USER GUIDE

Platform User Guide

Omnichannel User Guide

This is a full platform guide for ACTO Omnichannel end-users. **End-users,** or **Learners**, refers to individuals who are deployed content and other training and resources on the platform. This document is organized into sections, each of which explores a capability or feature a learner may come across.

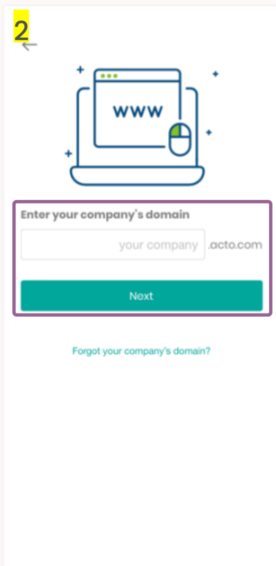
Click into any of the sections below to get started!

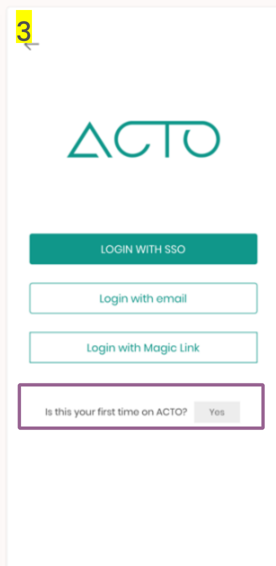
Table of Contents

How to Log in to the ACTO Platform

How to Log in to ACTO on a Mobile Device

Download ACTO Omnichannel from the Apple store. Please follow the step-by-step image guides below to log in to ACTO on your mobile devices including iPhones and iPads.

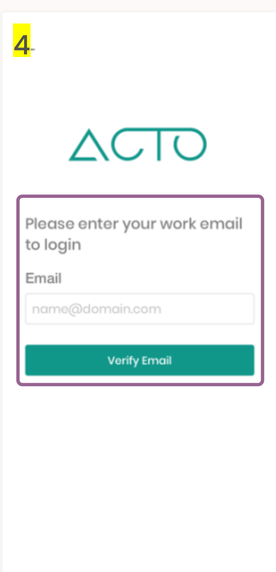


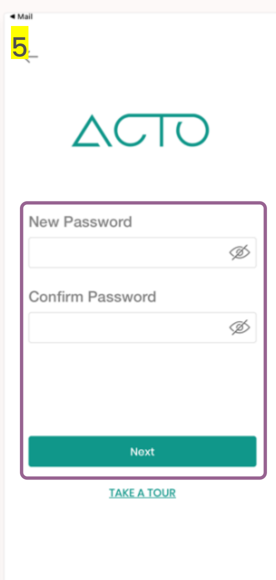


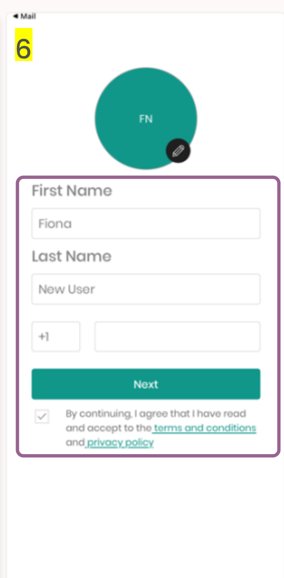
1. Open the app after downloading it. Then click the Login button.

2. You will be asked to enter your company **domain name**. This can be found in the email welcoming you to the platform. Enter it and click

3. If this is your first time on ACTO click Yes to verify your email. Check your email inbox for an email from ACTO titled **Verify Email**. Click the Verification link in the email.







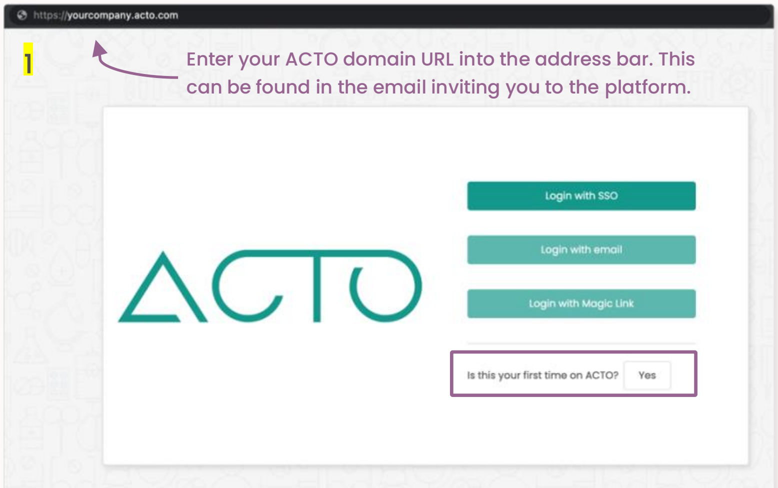
4. Once you verify your email, you will return to the login page. Enter your email. Click Verify Email.

5. Create and confirm a password. Click Next.

6. Enter your first and last name. Click the **Terms and Conditions and Privacy Policy** checkbox. Then click Next. This will log you in to the app.

How to Log in to ACTO using a Web Browser

The user experience when logging in to ACTO via web browser is similar to your mobile device. When logging in to ACTO on your computer, please use **Google Chrome** or **Mozilla Firefox** browsers for the best experience.



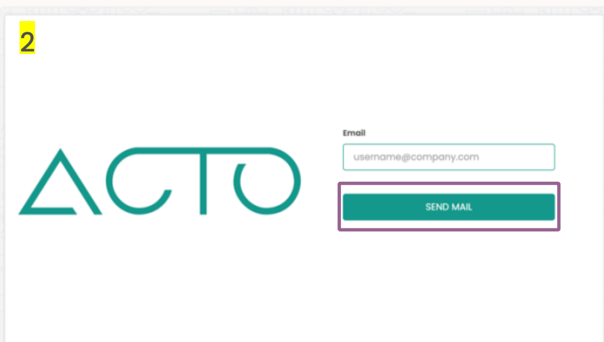
1. Enter your company's ACTO URL in your browser's address bar. This will usually be formatted like: **companyname.acto.com**. If this is your first time logging in, click Yes.

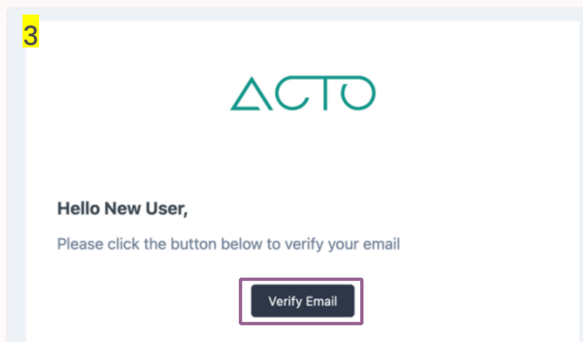
2. Enter your email address and click Send email. You will be sent a verification email.

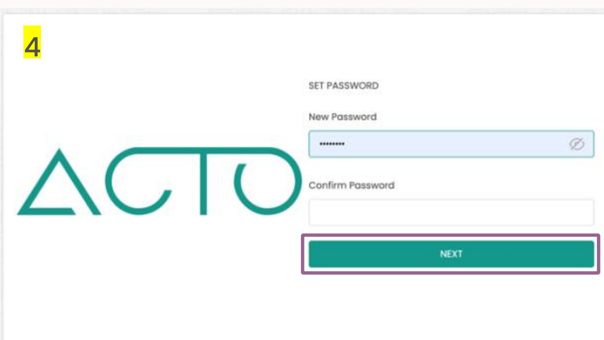
3. In the verification email, click Verify Email. This will return you to the login page.

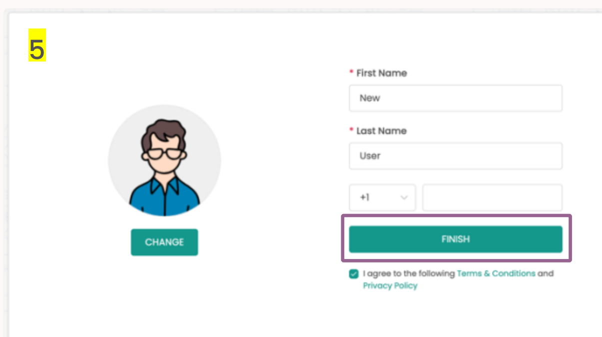
4. Create a new password. Click Next.

5. Enter your first and last name. Click the **Terms and Conditions and Privacy Policy** checkbox. Then click Finish to log in.









User Guide to Platform Navigation

How to Navigate Your ACTO Homepage

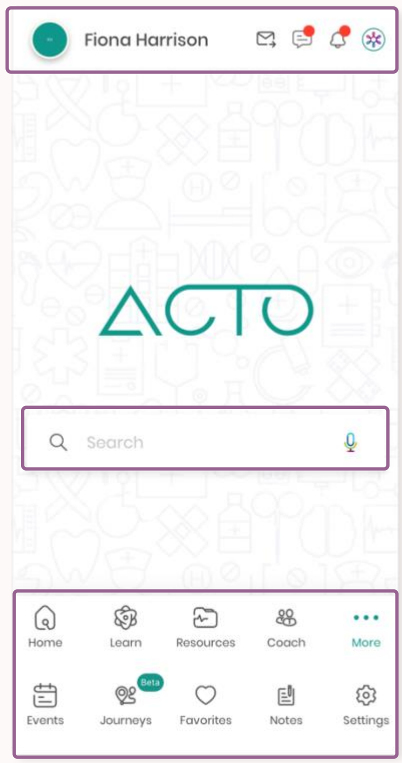
When you first log in to ACTO you will see the **Home screen**. You can access your Profile, Messages, Notifications, Settings, an app-wide Search Bar, and all the platform's tools that are enabled for your account from here.

Click the circle to the left of your name for your learning profile, account details, and settings.

This Search bar is your main concierge. It allows you to search globally through the entire portal.

Click the **microphone** next to the Search bar to use LAICA, ACTO's voice-automated assistant, to search for content and resources.

The Navigation menu is available in every section of the app. Click into each icon to access that tool.



Click the **Bell icon** for Notifications. This is where you receive all your in-app notifications. Clicking into a new content or resource notification will take you directly to that content or resource.

Click the **Chat bubble icon** for Messages. If this messaging tool is enabled, this is where you can receive and/or send messages.

Click the **Envelope icon** to view sent emails and associated data.

Click More to expand or detract the main Navigation menu.

ACTO Navigation Menu Overview

ACTO's **Navigation menu** will always be on the bottom of your mobile screen and to the left on your computer browser. Please note that all the tools below may not be enabled for your organization's ACTO portal.

- Home Your landing page when you sign in. Access the platform-wide search bar here.
- Learn Where you will find all the training content deployed to you.
- Resources Your digital briefcase containing all the resource Collections shared with you.
- Coach Where you access the scenarios, certifications, or field coaching reports that apply to you.
- Events Where you access and register for the events that have been deployed to you.
- Favorites A place to quickly access and organize resources you have favorited across the platform.
- Notes A place to quickly access and organize notes you have added to resources.
- Settings Click to update your profile, change your password, update notification settings, or log out.

User Guide to Learn

The Learn tool on ACTO provides learners with engaging microlearning experiences by breaking complex information down into easy-to-access training modules called ActionPacks.

Click into any of the links below to get started.

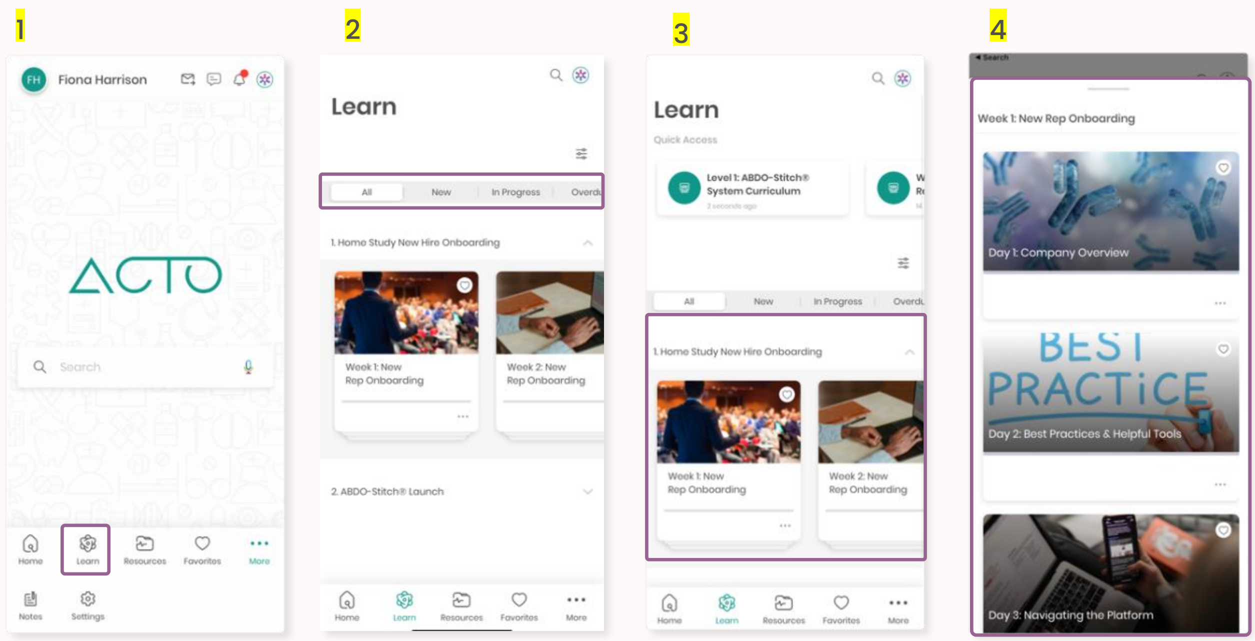
Table of Contents

What is Learn?

- Learn contains all the training modules, known as ActionPacks, assigned to learners.
- ActionPacks are grouped into folders called Learning Sets. Learning Sets are grouped into broader Categories, for example type of training, product category, clinical category.
- ActionPacks contain engaging and interactive resources like videos, PFDs, checklists, and images. ActionPacks may also contain quizzes, surveys, polls, and digital signature requirements.
- Users may be able to take certain actions with resources in an ActionPack **depending on the permissions administrators set**. This includes the ability to favorite, download, email, share, present, or print resources.

How to Navigate through Learn

Users may access Learn on their mobile devices or computer browsers. **When using a computer browser to access the platform, please use Google Chrome or Mozilla Firefox for the best experience.**



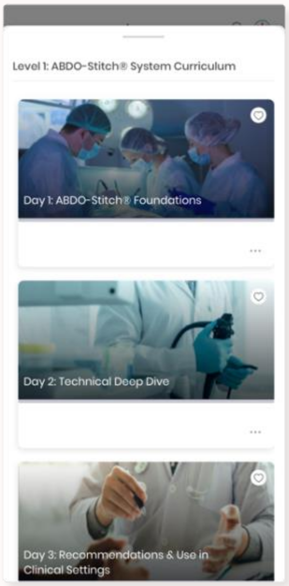
1. Click into Learn from the **Navigation Menu**. This menu is on the bottom of the mobile app and to the left on the web platform.
2. Click through the New, In Progress, Overdue, Completed, or All Tabs on the top of Learn to filter through your training content.
3. Click the up or down arrows to the right of each **Category** within Learn to expand or detract it. Once a Category is expanded, scroll left or right to view the **Learning Sets** in that Category,
4. Click into a Learning Set to view the **ActionPack(s)** within it. Click into an ActionPack to get started.

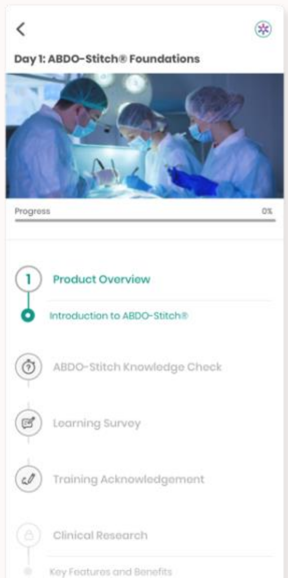
PROTIP The **Quick Access** bar on the top of the Learn capability – and other capabilities across the platform - allows you to quickly access your most recently viewed content.

How to Navigate through an ActionPack

An ActionPack is a learning module in ACTO. ActionPacks live within Learning Sets. To view an ActionPack, click into it from its Learning Set. This takes you to the Table of Contents. Click into the first Lesson to get started. Upon completion you may go back and reference the training in an ActionPack.

ActionPack Table of Contents



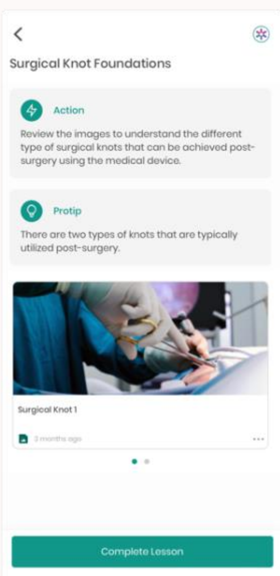


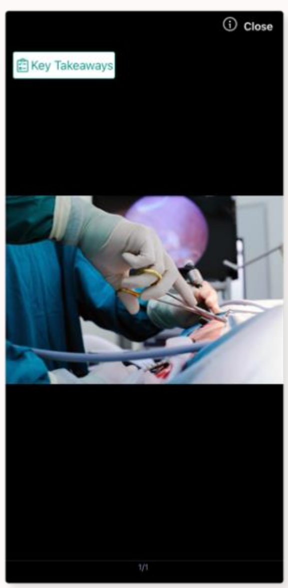
ActionPacks are organized into Topics and Lessons. Topics are main sections and Lessons are subsections related to the Topic.

In this example *Product Overview* is the first Topic in the ActionPack. Click the Lesson below this section to get started.

PROTIP The first Lesson in this module is highlighted, and others are grayed out. This means the ActionPack is meant to be completed sequentially. Once a Lesson is complete, you may navigate forward.

Overview of a Lesson



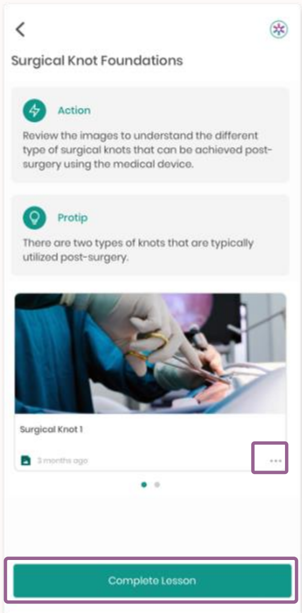


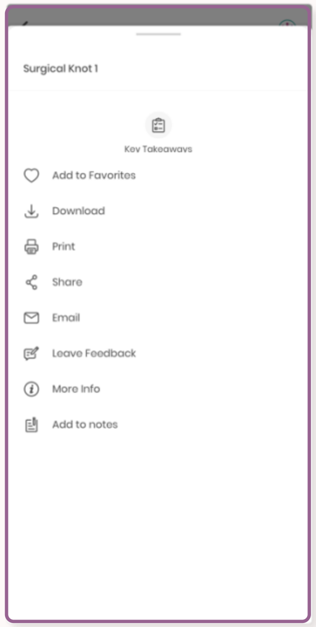
- Lessons may contain a number of resource types. For example, Actions and Protips. These provide learners with context and guide them through the Lesson.
- Lessons may also contain resources like videos, images, documents, and more. Swipe through the resources to view each one. **Click into a resource to view it in full screen.**
- Click the **More icon** ••• on the bottom right of a resource to view a list of actions you can take with the resource.

PROTIP Once you have reviewed the content in a Lesson, please click the **Complete Lesson** button to save your progress and move onward to the next Lesson.

What are Resource Permissions?

To access resource permissions, click the **More icon** ••• on the side of a resource. Each resource deployed to you has custom permissions. Depending on the permissions your administrator has set for a particular resource, you may be able to access some or all the menu options below.





PROTIP The Notes tool is a place to link to resources and add your personal notes related to that resource.

Notes are organized by date added. You can add a title to a note to further organize it. Access Notes at any time by clicking Notes from the Navigation menu.

Key Takeaways – Checklists or videos may be attached to summarize, highlight, or break down key information from a resource. **If a resource has Key Takeaways, you will see it here, and in the form of a little clipboard icon when you open the resource.**

Add to Favorites – Add resource to your favorites for quick access or reference. You may also click the **Heart icon** on a resource to quickly add it to a Favorites folder.

Download – Download the resource.

Print – Print the resource.

Share – Share the resource externally via text or other device apps.

Email – Email the resource to a client or external stakeholder from within the app.

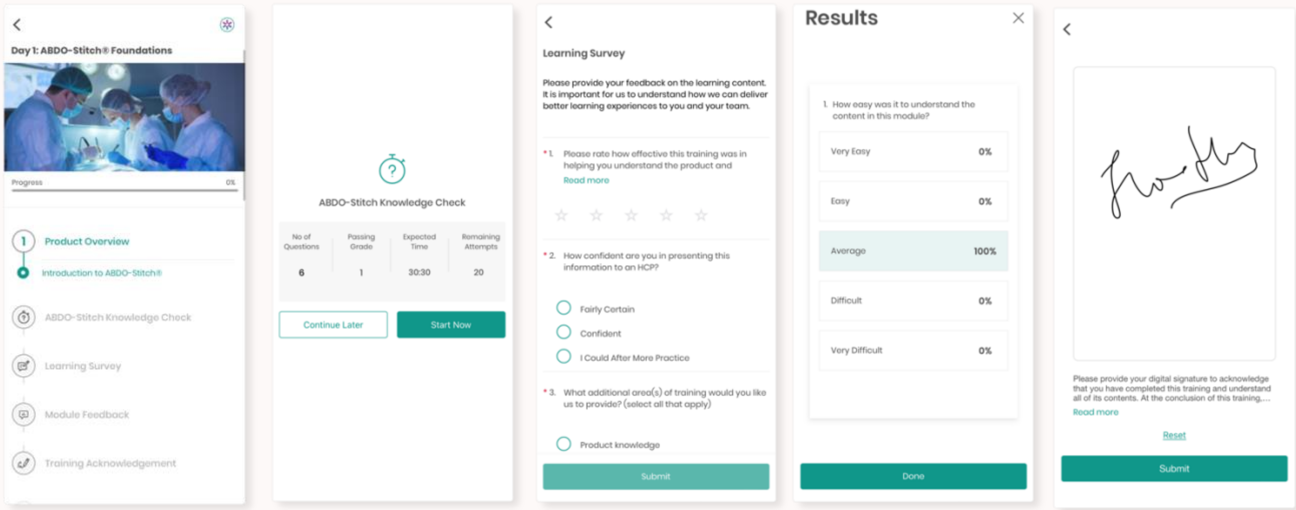
Leave Feedback – Add feedback to a specific resource for your own reference.

More Info – Access general information about the resource including file type, size, date created, and date updated.

Add to Notes – Add a note relating to this resource. You will be able to reference the note later in the Notes section of the app.

NOTE End-users may take actions with resources <u>only</u> if these permissions have been set and approved by administrators. Resource permissions include the ability to download, print, share, and favorite, a resource. Click the **More icon** (three dots) on individual resources to view which permissions are enabled.

Interactive Resources in an ActionPack



ActionPacks may contain interactive resources like Quizzes, Surveys, Polls, and Digital Signatures. These resources will pop up as you proceed through the module. You will also see them in the ActionPack Table of Contents. Each resource provides instructions in how to complete it

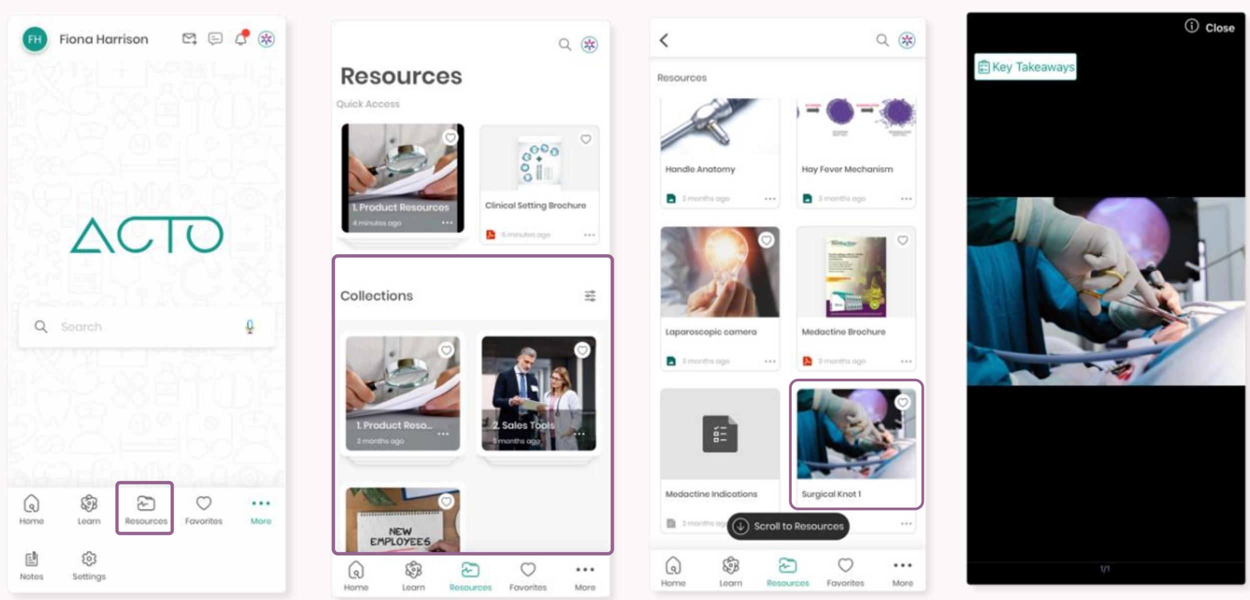
User Guide to Resources

The **Resources** tool gives learners quick access to sales, marketing, clinical, and other approved content. Use **Resources** for pre-call prep, to refresh on messaging, to pull key takeaways from content, and much more.

How to Access Resources

Resources is your digital briefcase. It contains all the resources that have been shared with you. Access Resources using a mobile devices or computer browser. **If you are using a computer browser, we recommend Google Chrome or Mozilla Firefox for the best experience.**

Resources are organized into folders called Collections. To access Collections, click into **Resources** from the Navigation menu on the bottom of your mobile screen or left side of your web browser. Click into a Resource **Collection** to view the resources within it. Click into a resource to view it in full screen.

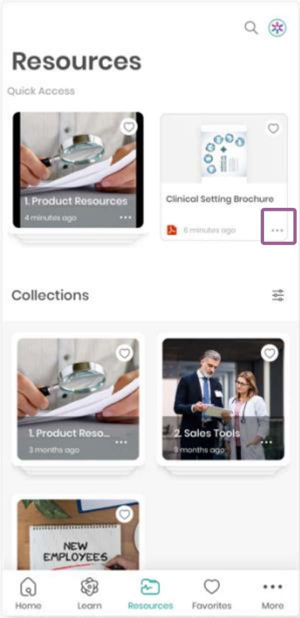


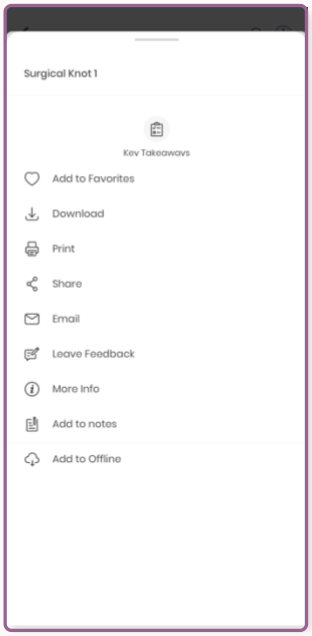
PROTIP Click into a **Collection** to view the resources it contains. The **Quick Access** section on top of the **Resources** section allows you to quickly access the Collections and resources that you most recently accessed.

What are Resource Permissions?

Each resource shared with you has permissions set for that particular resource. This means that depending on what has been enabled by your platform administrators, you may be allowed to take certain actions with resources like downloading, sharing, printing, or adding the resource to your Favorites.

To access the more options menu, please click the three dots on the bottom right of a resource or Collection.





What are Key Takeaways?

If your platform administrator has added a checklist or supplemental video to your resource, you will find it in the resource's Key Takeaways.

Where do you find Key Takeaways?

If a resource has Key Takeaways, click into the resource menu and select the Key Takeaways button. You may also click into a resource and select the Key Takeaways clipboard icon on the bottom of the resource.

Key Takeaways – Checklists or videos may be attached to summarize, highlight, or break down key information from a resource. **If a resource has Key Takeaways, you will see it here, and in the form of a little clipboard icon when you open the resource.**

Add to Favorites – Add the resource to your favorites for quick access or reference. You may also click the **Heart icon** on a resource to quickly add it to a Favorites folder.

Download – Download the resource.

Print – Print the resource.

Share – Share the resource externally via text or other device apps.

Email – Email the resource to a client or external stakeholder from within the app.

Leave Feedback – Add feedback to a specific resource for your own reference.

More Info – Access general information about the resource including file type, size, date created, and date updated.

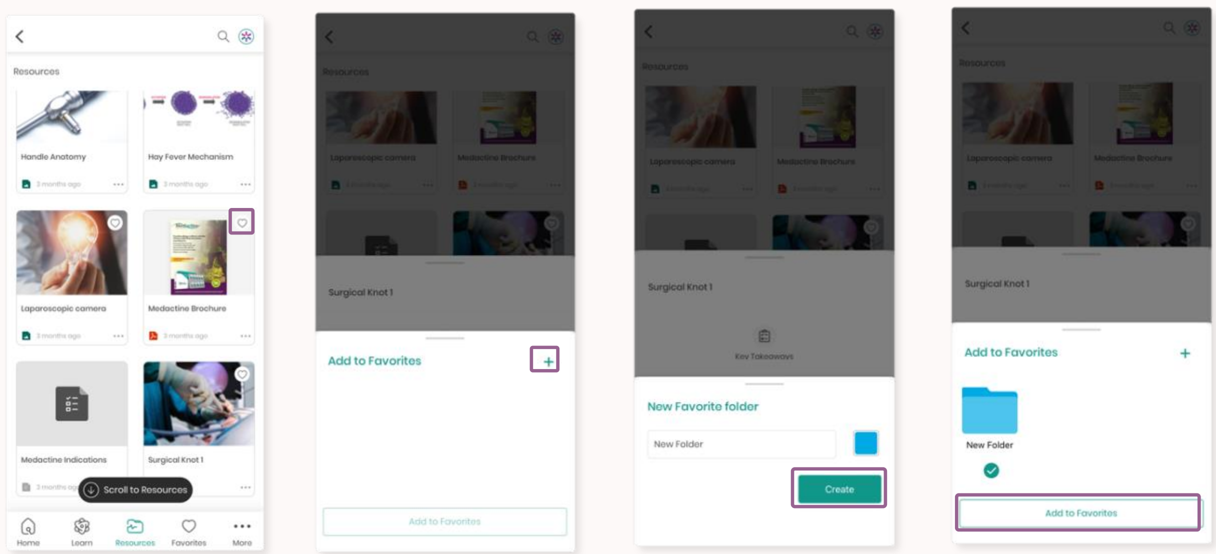
Add to Notes – Add a note relating to this resource. You will be able to reference the note later in the Notes section of the app.

Add to Offline – If offline mode is enabled for your platform, you will be able to add a resource, or an entire Collection to be downloaded for offline access. If you would like to remove a resource from offline mode, you would do it from the same menu.

PROTIP If you do not see one of the permissions shared here, it just means that it has not been enabled for the resource, or in the case of offline mode, for your platform.

How to Favorite Resources

Adding a resource to Favorites allows you to curate the resources shared with you into folders, highlighting, organizing and quickly accessing the content you find most useful. To add any resource into Favorites, click the **Heart icon** on the top-right of the resource or click Add to Favorites in the resource's options menu.



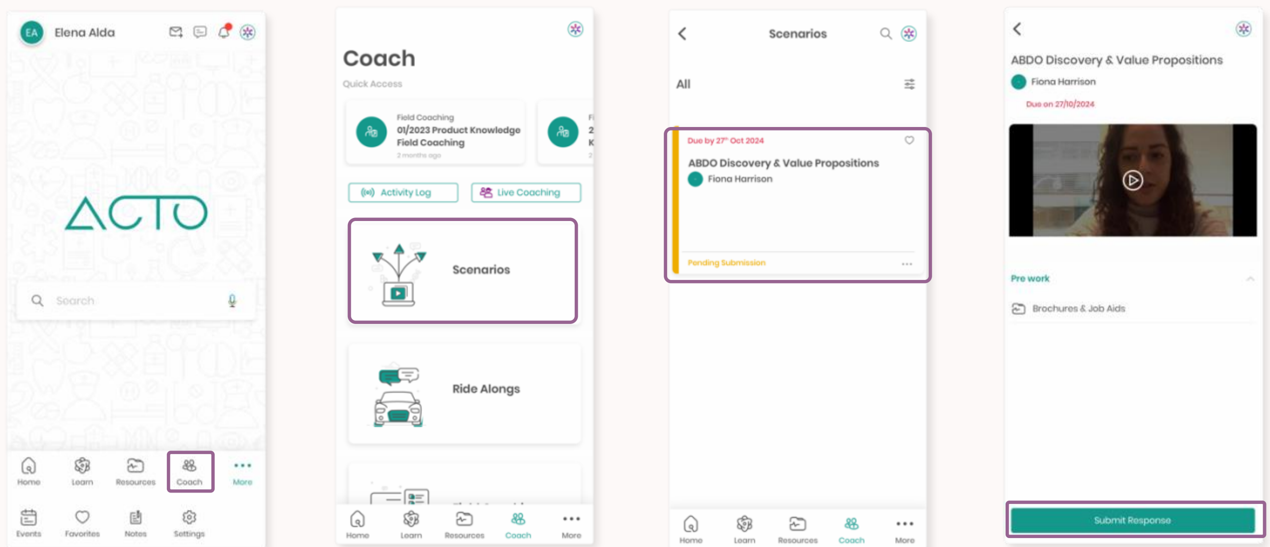
PROTIP To view content you have favorited, or to create or update your Favorite folders, click **Favorites** from the Navigation menu. Add content from Learn, and Resources Favorites.

User Guide to Coaching Scenarios

Coaching Scenarios allow you to engage in virtual role-play with your Managers and Mentors. **A Scenario is a specific situation around which a coaching opportunity or conversation may be initiated.** Using ACTO, your managers create and deploy Scenarios to you; and in turn you respond to the Scenario via video response.

How to Access Coaching Scenarios

Access **Coach** on your mobile device or computer browser. **If you are using a computer browser, we recommend using Google Chrome or Mozilla Firefox for the best experience.**



1. Click into Coach from the Navigation Menu.
2. Select Scenarios.
3. Click into a specific Scenario to view its details. Your Manager may have provided context with text instructions or an explainer video. Scroll down to view any **Pre-work** or additional resources related to the Scenario. Click into the content to access it.
4. When you are ready to submit the Scenario, click Submit Response. Click Camera and Start Recording to record a live submission. Once you are satisfied with your response click Stop Recording. Enter any relevant details and a response title and click Submit Response. **You may also click Gallery and select a pre-recorded submission if this permission is enabled for your scenario.**
5. To re-record click the back arrow on the top-left of your screen

Scenario Statuses

Pending Submission - You need to submit a response to the Scenario.

Pending Review - You have submitted a response and a Manger needs to view it.

Approved- Your response has been approved and this Scenario is complete.

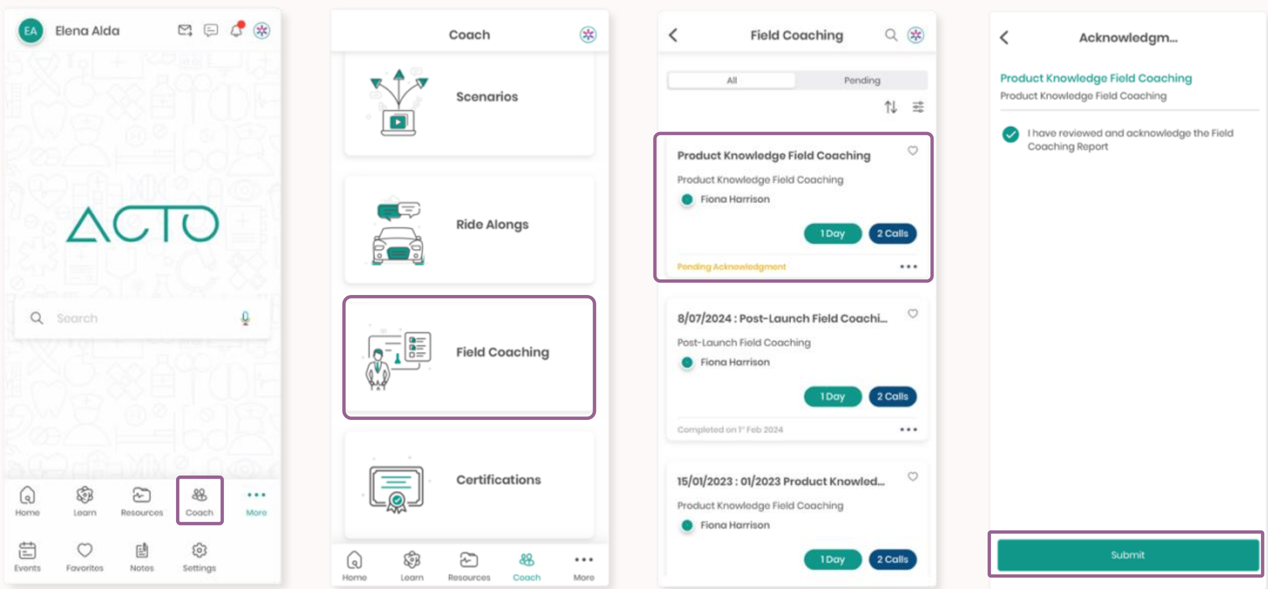
Resubmission Required -You are required to resubmit a response to the Scenario.

User Guide to Field Coaching

Field Coaching allows Managers to observe and evaluate rep activity in the field, and then use Field Coaching Report rubrics to document their assessments. Once submitted, reps may access this feedback in ACTO.

How to Access Field Coaching

Access **Coach** on your mobile device or computer browser. **If you are using a computer browser, we recommend using Google Chrome or Mozilla Firefox for the best experience.**



1. Click into **Coach** from the Navigation Menu.
2. Select the **Field Coaching** tab from within **Coach**.
3. Click into the field coaching you would like to view.
4. Scroll down and review your assessment. If an Acknowledgement is required, please click the **Acknowledgement** button. Read and click the Acknowledgement, and click **Submit**.

Acknowledgement

Your Manager may require you to acknowledge receiving your Field Coaching assessment. If this setting is enabled, once you review their Feedback, you will be prompted to sign off once you have reviewed your Field Coaching assessment.

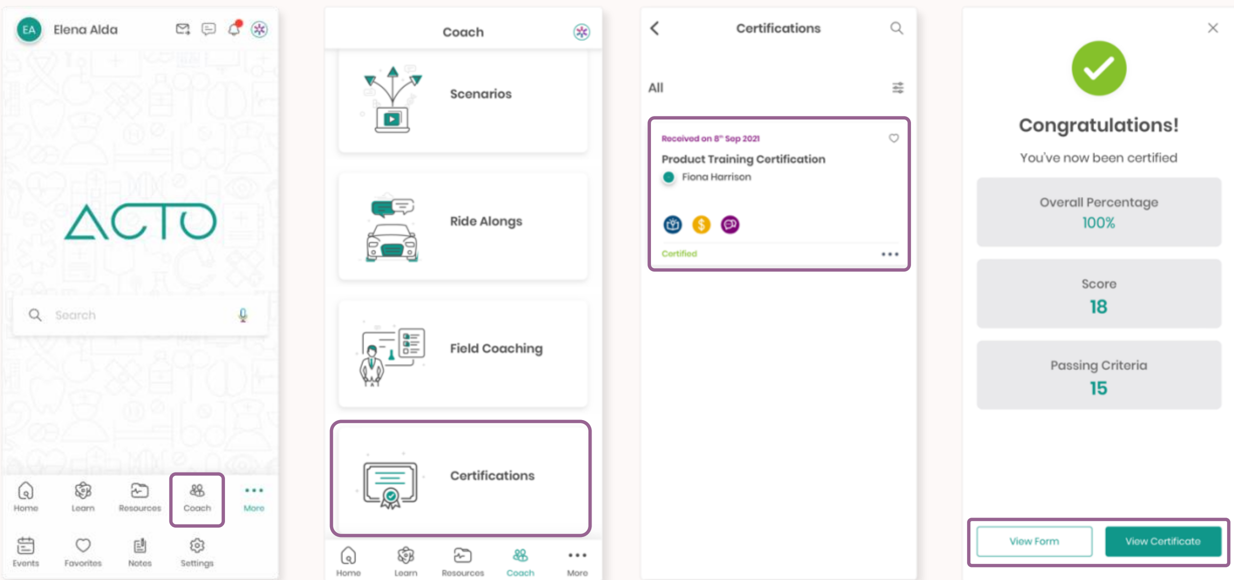
User Guide to Coaching Certifications

What Are Coaching Certifications?

Coaching Certifications allow managers to certify their team members. Certifications can be used to assess and certify that team members have successfully completed organizational requirements.

How to View and Access Your Certifications

Access **Coach** on your mobile device or computer browser to view your Certifications. If using a computer browser, we recommend using Google Chrome or Mozilla Firefox for the best experience.



Once you have been certified, you may view the Certification in ACTO's Coach tool. Click into **Coach** from the Navigation Menu, and into **Certifications**. Then click into the specific Certification you would like to view.

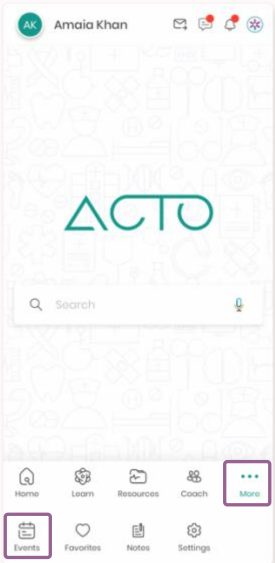
1. Click into Coach from the Navigation Menu.
2. Select the Certifications tab from within **Coach**.
3. Click into the certification you would like to view.
4. Scroll down and review your overall performance in the certification. Click View Form to see your manager's responses to your certification assessment questions. Click View Certificate to view your certificate document.

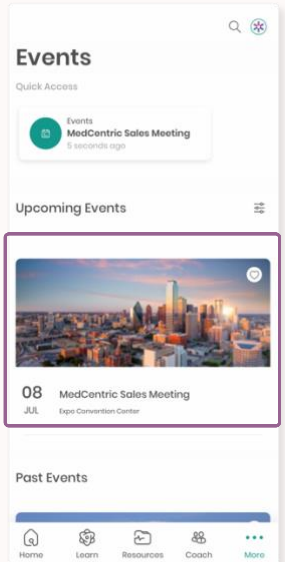
PROTIP To view your certificate, click into **View Certificate**. To learn more about the assessment criteria, click **View Form** to see your manager's responses to your certification assessment questions.

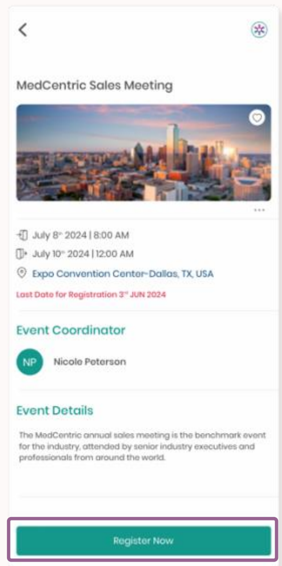
User Guide to Events

How to Access and Register for Events

Access **Events** on your mobile device by downloading the latest version of the ACTO Omnichannel app. If you are using a computer browser to access the platform, please use Google Chrome or Mozilla Firefox.







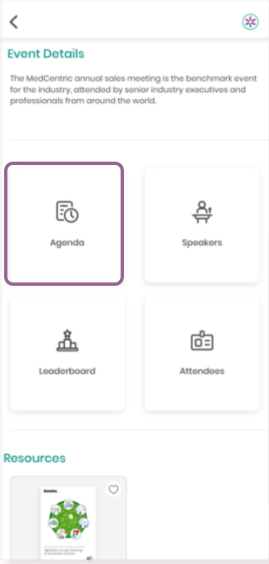
Click into Events from the main navigation menu.

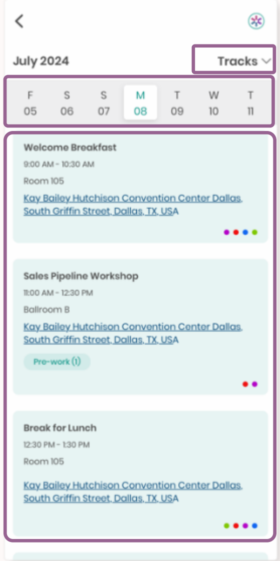
Upcoming Events shows the events that are coming up.

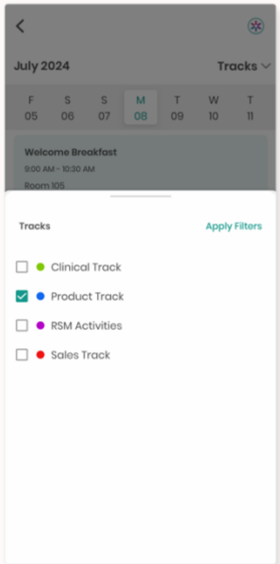
Click into an upcoming event. Scroll down and click Register Now to register for the event.

How to Navigate an Event Agenda

Click into an Event's **Agenda** tile to see the sessions you have been added into. You may filter your sessions according to track. Click into a particular session to see more details or any associated resources.







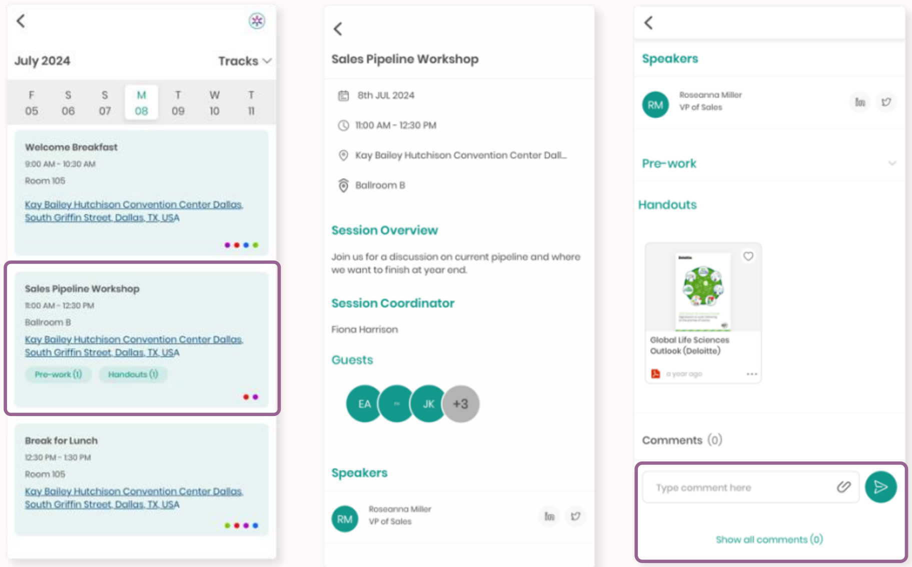
View Event Details within the Event page including the Agenda, Speakers, Attendees, and any event related resources.

Click into the event Agenda to view the sessions within it.

Click Tracks to filter event sessions by track.

How to Navigate a Session

Events may include resources associated with the entire event, or resources associated with specific sessions. **Click into a session to access the Learning Sets, Collections, or Handouts associated with it**. To access general content associated with the event, click into an event and scroll down until you see Resources.



Click into a specific Session to view session details including any associated prework and handouts.

PROTIP As you scroll through your Event sessions, please note the Comments section. This is a social and communal section where you may be directed to engage and interact with colleagues and team members during a session.