

PowerHouse Workforce User Guide _{V.7.3}

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1. The Administration Portal

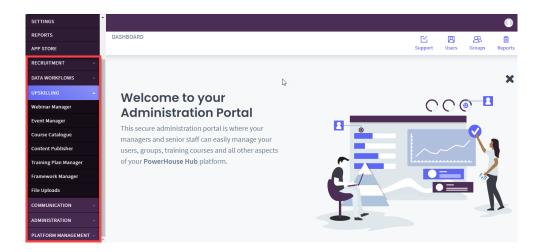
The secure Administration Portal is where you access your main log in for all editing and management on the platform from the back end. You would give Admin access to those that are either management or senior staff. The log in page is identical to that of the other users, yet once logged in under your credentials, all viewing, accessibility, and permissions are unique.

To log in, simply:

- 1. Enter your username
- 2. Enter your password
- 3. Click the Login button

Hub PowerHouse	Home	Privacy Policy	Terms Communities	rHouse
			N Username Type username Password Type password	
			Login	Forgot Username/Password?

To access the modules within the platform, click the menu items within the left-hand side menu. As you click each section, it will expand to show all child modules.



2. Parent Modules

Parent modules can be found in the left-hand menu:

PowerHous Hub	е
ADMIN DASHBOARD	
SETTINGS	
REPORTS	
APP STORE	
RECRUITMENT	-
DATA WORKFLOWS	-
UPSKILLING	-
COMMUNICATION	-
ADMINISTRATION	~
PLATFORM MANAGEMENT	•
	-

2.1 Dashboard

This is the default screen that you see once logged into the portal. The dashboard is where your managers and senior staff can easily manage your users, groups, training courses and all other aspects of your PowerHouse Hub platform.

2.2 Settings

This parent module is related to the pages of the learner portal. In this module you can adjust the Google Analytics settings, the email addresses that are used on the site, and enable or disable the available modules for certain user licenses. Settings such as CPD and re-induction for courses can also be adjusted here.

2.3 Reports

Reports play an important role in the management of this platform. Each feature has an auto generated report already available. If you want a customized report, you can easily generate this by clicki8ng the Create custom report button.

2.4 App Store

A selection of Apps has been integrated into the PowerHouse Workforce Platform to provide you with additional functionality and services. Select an App and follow the configuration settings to add the solution to your platform.

2.5 Recruitment

This parent module is where HR and hiring managers can easily create and manage current Jobs and talent pools. Recruitment is an optional module and will only display if enabled.

2.6 Data Workflow

This parent module allows you to create workflows and welcome emails for your new hires. These welcome emails will include a comprehensive Onboarding or Pre-screening Workflows with Content

Pages, a Personal Information section, a File Upload section and Verification Tasks. You can also add Care Advantage assessments and Police and Work Rights check in you have the App enabled.

2.7 Upskilling

This parent module has many features that will help build the foundation of your platform. Most importantly: Skills, File Uploads, Framework Manager to help create the backbone for all users to increase their professional development. You can also build your courses/training programs through the Content Publisher and create upcoming Events and Webinars.

2.8 Communication

This parent module allows you to publish News to your Users, create surveys for interaction and insight and upload all relative resources that your Users may need to complete any required training or tasks.

2.9 Administration

This parent module is your direct source for creating User Accounts, building Group Management for reporting purposes and content distribution across the platform; Group Branding to showcase your organisations colour schemes and imagery. This module also allows you to edit automated email templates and create relevant certificates for completions across all training.

2.10 Platform Management

This Parent Module provides access to Web Content Editor which is the source where you can edit all front-end content on your ecommerce/website page (Login Page). You not only can use this to showcase your general Privacy and Terms and Conditions yet also upcoming events in your organisation or community supports etc. Web Content Editor can be used to tailor your own banners, imagery, and external public announcements if desired. Web Content Editor will also allow you to configure your Talent Communities page if you have the Recruit Parent Module enabled.

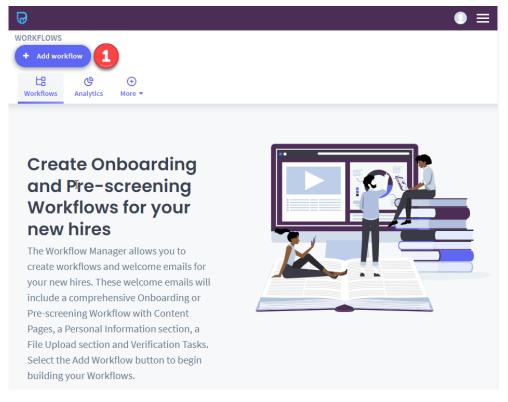
3. Data Workflows

3.1 Workflow Manager

Create Onboarding and Pre-screening Workflows for your new hires

The Workflow Manager allows you to create workflows and welcome emails for your new hires. These welcome emails will include a comprehensive Onboarding or Pre-screening Workflow with Content Pages, a Personal Information section, a File Upload section and Verification Tasks.

1. Click the Add Workflow button to begin building your Workflows.



- 2. Click Build from scratch, if you want to build a workflow from scratch and then skip to step 4
- 3. Click duplicate from existing workflow if you have an existing workflow that you want to copy. You can then select the workflow you want to copy from the drop-down box that appears and click save.
- 4. If you selected Build from scratch in step 2, add a workflow title
- 5. Select the workflow type from the dropdown box option are:

Pre-Screen: A Pre-Screen Workflow is used to qualify candidates before you select the successful candidate for a role. The candidates can add their personal information, upload compliance and credential files, self-assess against required skills and assign themselves to Talent Pools.

Onboarding: An Onboarding Workflow is used to introduce your new hires to your company. You can request additional compliance and credentials files, complete Police Checks and Work Rights Checks and have your new staff complete induction courses. **General:** A General Workflow allows you to create a workflow unique to your organisation. Build your own workflow using the various Workflow Tasks available, including file uploads, Police Checks, courses and self-assessed skills

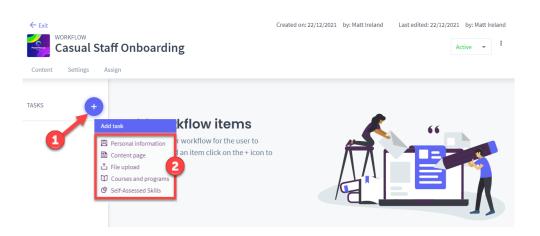
- 6. Add a description to give more context to the Workflow.
- 7. Set the status of the workflow. Active means users can access the workflow. Disabled means users will not be able to view the workflow on the platform.
- 8. Click Save to save changes

ADD NEW WORKFLOW			
Workflow details	Choose template	3	
Provide some introduction to your onboarders on what you need them to do next.	~	° –	
Workflow Type	<u> </u>	Le	
A workflow can be used in specific ways for different user types. Workflow Types include:	Build from scrate	h Duplicate from existing w	orkflow
Pre-Screen: A Pre-Screen Workflow is used to qualify candidates before you select the successful candidate for a role. The candidates can add their personal information, upload		If you duplicate from existing workflow it n Workflow Type	nust be the same
compliance and credential files, self-assess against required skills and assign themselves to Talent Pools.	Workflow title *		
Onboarding: An Onboarding Workflow is used to introduce you			
compliance and credentials files, complete Police Checks and	Workflow Type *		
Work Rights Checks and have your new staff complete induct	Please Select		Ŧ
General: A General Workflow allows you to create a workflow	Description		
unique to your organisation. Build your own workflow using the various Workflow Tasks available, including file uploads, Polities Checks, courses and self-assessed skills.			
	0/250		
	Status		
	Active -		
-			

3.2 Adding workflow items

This is where you can add items to your workflow for the user to complete.

- 1 To add an item click on the + button
- 2 Select the required task



3.2.1 Personal Information

The preset name of this form is personal information, however, you can create any type of form for your business needs by renaming and deleting fields.

Before populating this task, ensure you have created Custom Fields for your personal information form.

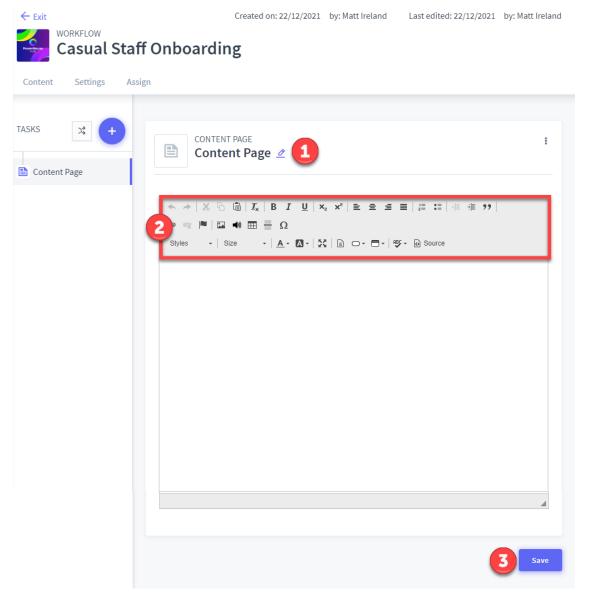
- 1 To change the title, click the edit icon, type in the desired title and click save button
- 2 In the CK editor add a brief description regarding the users next steps
- 3 Click Add Standard Field if you need to add another default field to your form
- 4 Click Add Custom Field if you need to add a custom field to your form
- 5 Click Rename to change name of field. Add a new title in the custom title field and press rename field button.
- 6 Click Remove field to delete field from the form
- 7 Click and drag the hamburger option to reorder fields
- 8 When all required fields are showing click Save

= Exit			Created on: 22/12/2021 by: Matt Ireland	Last edited: 22/12/202	1 by: Matt Irela
	f Onboarding				Active 👻
	e				
ontent Settings Ass	Ign				
KS 33 🗭					
KS 🕺 🕂	PERSONAL INFORMATION				1
Personal Information	Personal Informatio	on 🖉 🥊			
r cisonar mormation					
				# 🖾 📣 🖽 🚆 🤇	2
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		6			
	body p				4
	Personal 3	+ Add Stand	ard Field + Add Custom Field		
	The following fields will be			5	
	displayed to the user to complete, you can toggle them	Role			
	to be mandatory.	1		_	Û
				6	
		Title		-	
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					_
		Mob	ile		1
		1	+61 * 412 345 678		Û
		E	il address *		
		Ema	it address "		 ✓ ✓
					-
					8 Save
					-

3.2.2 Content Page

The content page is used to provide general information relevant to your business.

- 1 To change the title, click the edit icon, type in the desired title and click save button
- 2 Use the options in the CK Editor to make your content more appealing
- 3 Once finished click the Save button



3.2.3 File Uploads

File Uploads is where candidates can upload documents to ensure their business is compliant.

Before populating this task, ensure you have created files for your candidates to upload in the File Uploads module

- 1. To change the title, click the edit icon, type in the desired title and click save button
- 2. Provide a general introduction in the CK Editor that explains what you want the user to do
- 3. Select the file upload
- 4. Name the file
- 5. Toggle YES if you want the file upload to be mandatory
- 6. Toggle YES is if the file has an expiry date. i.e drivers license and CPR certificates have an expiry date

7. Click Save to save changes. To add an additional File upload task to your workflow add another File Upload workflow item.

← Exit	Created on: 22/12/2021 by: Matt Ireland Last edited: 22/12/2021 by: Matt Ireland
WORKFLOW Casual Staff C	Onboarding
Content Settings Assign	
TASKS 13 +	FILE UPLOAD File Upload 2 File Upload 2
	File Upload Select the file you want your users to upload. You can give it a different name. Showing 0 File uploads
	<u>ی</u>
	3 Choose File
	File Name
	5 This file is mandatory
	5 Expiry Date Required
	7 Save

3.2.4 Induction Courses

This is where your candidates can complete relevant induction courses prior to commencing their employment.

Before populating this task, ensure you have created courses and learning programs for your candidates to complete. You can do this through the Content Publisher and Training Plan Manager modules.

- 1. To change the title, click the edit icon, type in the desired title and click save button
- 2. Provide a general introduction in the CK Editor that explains what you want the user to do
- 3. Select the course(s) that will be assigned to the workflow
- 4. Select the Training Plans that will be assigned to the workflow
- 5. Click Save to save changes.

← Exit		Created on: 22/12/2021	by: Matt Ireland Last edited: 04/01/	/2022 by: Matt Ireland
	Onboarding			Active -
Content Settings Assign				
content settings Assign				
TASKS 🛪 +	COURSES AND PROGRAMS			ı.
D Induction Courses				
		<u>U</u> x _a x ^a E ≤ z ≡ ::: :: :: U - X D ⊂ - □ - ♥ - @ Source	≉ ?? ∞ ∞ № ⊑ 40 ⊞ ≣ :	Ω
		2		
				A
	Assign Courses Select the courses that will be	Q To search, start typing course name		
	assigned to the Onboarding Workflow.	HR Basics		
		Onboarding Workplace Health and Safety		P
			\checkmark	
	Assign Training Plans	Q To search, start typing training plan n	ame	
	Select the Training Plans that will be assigned to this Onboarding	Certified Care Service Excellence (CCSE)	Program	
	Workflow.		\checkmark	
				5 Save

3.2.5 Self-Assessed Skills

This is where your candidates can self-assess themselves against the skills that you require for the role. Before populating this task, ensure you have created the required skills in the Skills module.

- 1. To change the title, click the edit icon, type in the desired title and click save button
- 2. Provide a general introduction in the CK Editor that explains what you want the user to do
- 3. Select all the relevant skills you want users to self-assess against
- 4. Click Save to save changes

Exit WORKFLOW Casual Staff	Onboarding	Created on: 22	2/12/2021 by: Matt Ireland	Last edited: 04/01/2022 by: Matt Ireland
Content Settings Assign				
Self-Assess Skills	SELF-ASSESS SKILLS Self-Assess Skills	: 2 1		1
		[U x,x* E ≤ ≤ ≡];; []-]X, x* E ≤ ≤ ≡];;		
		•		
		2		
				*
	Select Skills Select all the relevant skills you want users to self-assess against.	Q Search Skill	All Skill Categories	~
	You can add and edit the skills by visiting the <u>Skills module.</u>	 Ability to Work as Part of a Ability to Work Autonomou Ability to Work Under Pres 	usly	
		Attention to Detail Communication	June -	•
		Project Management Scrum Master		
			\sim	

3.2.6 Workflow Settings

- 1. To edit the settings, click on the Settings link
- 2. Click in the Title field if you need to make any changes
- 3. This is the image that will be shown to users on their dashboard. Click Choose file and select relevant file
- 4. Click in the Description field if you need to make any changes
- 5. Toggle ON and select a timeframe for completion if required
- 6. Toggle ON and select the relevant reminder
- 7. Ability to change the Status. Active means workflow is live and can be viewed by the learner. Disabled means users wont be able to see the workflow on their dashboard
- 8. Assign a certificate from the drop down box
- 9. Toggle ON to send overdue alerts to the user's manager
- 10. Click Save to save changes

← Exit	Created on: 22/12/2021 by: Matt Ire	land Last edited: 04/01/2022 by: Matt Ireland
Casual Staff Onboarding		Active 👻 🗄
Content Settings Assign		
0		
EDIT ONBOARDING WORKFLOW SETTINGS		
Workflow description	Title *	Thumbnail
Provide title and a short description to explain to users why they need to take this onboarding workflow.	Casual Staff Onboarding	Choose File No file chosen 3
	Description	
	•	
		4
	0/250	
Timeframe and reminders	Assign Time Frame Set Re	ninders
You can set a timeframe that the workflow has to be completed in and also set completions reminders.	5 🔍	
		eek before ay before
		the day
Workflow Type A workflow can be used in specific ways for different user	Workflow Type * Onboarding	
types. Workflow Types include:	onboarding	•
Pre-Screen: A Pre-Screen Workflow is used to qualify candidates before you select the successful candidate for		
a role. The candidates can add their personal information, upload compliance and credential files, self-assess		
against required skills and assign themselves to Talent Pools.		
Onboarding: An Onboarding Workflow is used to		
introduce your new hires to your company. You can request additional compliance and credentials files, complete Police Checks and Work Rights Checks and have		
your new staff complete induction courses.		
General: A General Workflow allows you to create a workflow unique to your organisation. Build your own		
workflow using the various Workflow Tasks available, including file uploads, Police Checks, courses and self-		
assessed skills.		
General Settings	Status * Assign Certificate	
Provide general information on the onboarding workflow by filling out the details.	Active 7 - No Certificate	8 -
	Send overdue manager alerts.	0 —
Cancel		10 Save

3.2.7 Assigning Workflow's

Please Note: Once you have assigned users to this workflow, some sections will no longer be editable. You will not be able to add or delete items.

- 1. To assign a workflow to the relevant groups, click the Assign link
- 2. Assign the group that workers and Managers that will have access to
- 3. Select the groups that you would like the user to be assigned to upon successful completion of this workflow
- 4. Toggle YES to send a notification email to all assigned users
- 5. Click Save to save changes

← Exit	Created on: 22/12/2021 by: Matt Ireland Last edited: 04/01/2022 by: Matt Ireland
Casual Staff Onboarding	Active 👻 🗄
Content Settings Assign	
0	
ASSIGN ONBOARDING WORKFLOW	
Assign Workflow to Groups Workers and Managers assigned to the following groups will have access to this workflow. *Polease Note: Once you have assigned users to this workflow, some sections will no longer be editable. You will not be able to add or delete items. Please check the following items and ensure they are correct: 1. Personal Information - Page fields being mandatory or not 2. File Uploads 3. Courses / Training Plans	Q To search, start typing a group name Human Resources Recruit Job Posts test
Transfer after completion Select the groups that you would like the user to be assigned to upon successful completion of this Onboarding Workflow. If you do not choose a group/s here, the user will remain assigned to the default groups assigned above.	 To search, start typing a group name Human Resources Recruit Job Posts test
Notification Email Tick to send all assigned users an email to notify a workflow has been assigned.	Would you like to send a Notification Email? Yes, send a notification email to all assigned users
Cancel	S Save

4. Upskilling

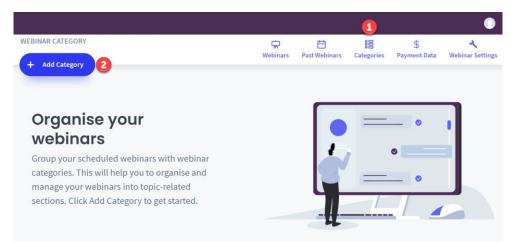
4.1 Webinar Manager

The webinar manager is a digital alternative to the Events module. The Webinar Manager enables you to organise and host CPD webinars and online seminars. Fill out the webinar form with the start date and time, cost, certificate and then assign it to your user groups.

4.1.1 Creating categories

Categories are used to create structure in the Webinar Manager. Categories help to organise and manage webinars into topic related sections.

- 1. Select Categories tab
- 2. Click Add Category



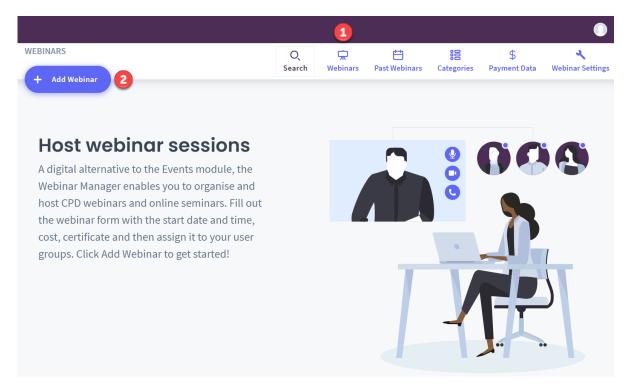
- 3. Add the category title
- 4. Add a category description
- 5. Click Save to save changes

						0
ADD CATEGORY		点 Webinars	E Past Webinars	20 Categories	\$ Payment Data	م Webinar Settings
Q.						
ADD WEBINAR CATEGORY						
Webinar Category Details	Category Title *					
Add a category for your webinars by adding the name and a short description (if	3					
required).	Category Description					
	4					4
Cancel						Save

4.1.2 Add Webinar

- 1. Click on the webinars tab
- 2. Click add webinar

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- 3. Complete fields in General Information. If Show On Frontend tick box is selected, the webinar will be displayed on the login screen.
- 4. Select if the user will receive an attendance certificate after watching the webinar
- 5. Assign Webinar to the relevant category
- 6. Set Webinar Status. **Active** means the users can view and register for the webinar. **Disabled** means the user won't be able to
- 7. Set the date and time for the webinar
- 8. Click choose file to upload an image. The user will see the image on their portal
- 9. Select the applicable fee option for the webinar
- 10. If the Webinar has a fee you are able to set a different price per group. To do this, click add group price, enter a price and assign to a group. This can be done multiple times
- 11. Click Save to save changes

VEBINAR		لي Webinars	E Past Webina	88 rs Categorie	\$ s Payment Data	Kebinar Sett
ADD WEBINAR			Settings	Description	Assign to Groups	CPD Category
General Information	Webinar Title*					
with one of our apps HERE. Fick 'Show on frontend' to display the webinar on the eCommerce landing page.	Webinar Unique Ide	ntifier				
	Contact Name*			Email*		
	Contact Phone			Mobile		
	Show On Fronter	nd				
Webinar settings 4	Certificate No Certificate	5 v ~	Vebinar Categ Select a webi	-	Webinar Status Active	¥
Date & time Provide information on the date and duration of the webinar.	Start Date * 05/01/2022	Start Time 09:00		Finish Date *	Finish Time	,•
Thumbnail The thumbnail image should be 500 pixels vide and 500 pixels high. If the image uploaded has other dimensions, it will be esized and stretched accordingly.	Thumbnail not uplo Upload Thumbnail Choose File No 1					
Nebinar fee ielect the applicable webinar fee option, an provide the details as follows.	 This webinars is This webinars had a second se					
	Default Price \$ (eg. 10	00.00)				
	If a group is assign for the user	ed to more	than one price	, the system w	rill display the che	apest price
	Group Price \$ (eg. 10 100		roup Assigned uman Resourc		nt	×
10						
10	+ Add Group Price					

4.1.3 Webinar Action Buttons

- 1. Allows the Webinar Details to be edited. Also, there is a new option called Tag This Webinar to a Skill, which awards attendees these skills after they watch the webinar
- 2. Mark Attendance. This can only be done once the Webinar date has passed using Past Webinars tab (6)
- 3. Download Attendee List. This can only be done after attendance has been marked
- 4. Delete this webinar
- 5. Sync Webinar with Zoom Meeting. Ensure Zoom integration has been enabled in App Store

					6			0
WEBINARS			Q Sear		Past Webinars	2000 Categories	\$ Payment Data	🔧 Webinar Settings
Below is a list of all we	binars currently listed c	on the site. To edit	the detai	s of an webinar c	lick the 'Edit this	Webinar' icon	in the 'Actions' o	olumn.
	Webinar title	Access code	URL	Start	End		Status	Registrations
▲匹子⊗⊃	Innovation Meeting			05/01/2022 09:00	AM 06/01/	2022 05:00PM	Active	0
2 4 Page: 1 of 1								

4.1.3 Webinar Description

- 1. Click the webinars tab
- 2. Click on the webinar title

EBINARS			0		eth	22	¢	
			O Search	、 Webinars	Past Webinars	88 Categories	\$ Payment Data	Webinar Setti
+ Add Webinar								
+ Add Webinar								
	ebinars currently liste	d on the site. To edi	t the details	s of an webinar o	click the 'Edit th	is Webinar' icc	on in the 'Actions	' column.
	ebinars currently liste Webinar title	d on the site. To edi Access code		s of an webinar o Start	click the 'Edit th End	is Webinar' ico	on in the 'Actions Status	' column. Registrations

- 3. To add a description, click on the Description link
- 4. Add a summary. This will display inside the webinar thumbnail on the learner portal
- 5. Add a description. This is what the learners see when they select the See More option
- 6. Click Save to save changes

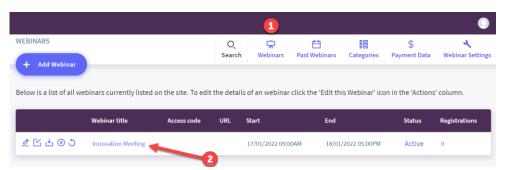
ADD WEBINAR		💭 Webinars	Past Webinars	Categories	\$ Payment Data	Kebinar Settin
ADD WEBINAR			Settings D	escription A	ussign to Groups	CPD Category
Webinar description Provide general information about your webinar.	4 Summary		3			
	0 / 300					h
	◆ → X ℃ 2= == ④ 排 Styles - 5	,, m = 2	⊨ = =	$\Xi \equiv \Omega$		
						4
Cancel						6 Save

PowerHouse Hub ™

4.1.4 Assign Webinar to groups

This enables the webinar to be assigned to relevant groups. Learners from the selected groups can then register and attend the webinar.

- 1. Click the webinars tab
- 2. Click on the webinar title



- 3. To assign the webinar to relevant groups, click on the Assign to Groups link in the top right menu
- 4. Select the relevant groups
- 5. Click Save to save changes

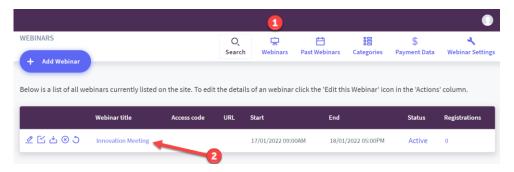
						0
ADD WEBINAR		💭 Webinars	Past Webinars	88 Categories	\$ Payment Data	🔧 Webinar Settings
ADD WEBINAR			Settings D	Description	Assign to Groups	CPD Category
Assign Webinar Assign this webinar to any of the following groups. This will show the webinar on 'Recommended for you' for your user(s).	Q To search, sta Human Res Recruit Job test	ources	oup name	3		
Cancel					(5 Save

4.1.5 CPD Category

CPD Settings need to be enabled for the CPD Category link to appear. To activate this, navigate to the Setting module, and select CPD from the Platform dropdown.

To set the CPDE Category:

- 1. Click the webinars tab
- 2. Click on the webinar title



- 3. Click the CPD Category link
- 4. Enter the CPD hours
- 5. Select the CPD Category
- 6. Click Save to save changes

								0
ED	IT WEBINAR				Ħ	000	\$	×
				Webinars	Past Webinar	s Categories	Payment Data	Webinar Setting
	WEBINAR DETAILS				Settings	Description	Assign to Groups	CPD Category
							3	
	Assign CPD Hours and Categories		CPD hours				-	
	Categories	4	0.00					
			CPD Categories					
		5	CPD training					
	Cancel							6 Save

4.2 Event Manager

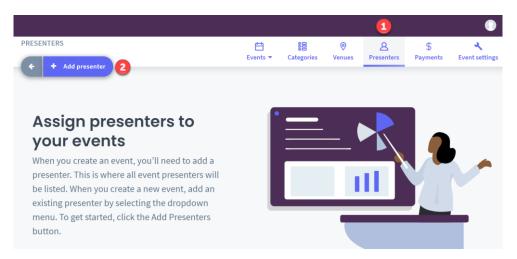
The Event Manager allows you to create and manage face-to-face training sessions, seminars and instructor-led learning. See a snapshot of attendance and waitlists at any time with powerful reporting capabilities. Fill out all applicable fields, including cost, venue and presenter, and then assign the event to your user groups.

You will need to pre create venues, presenters and event categories before you can add an Event.

4.2.1 Presenters

This is where all event presenters are listed. When you create a new event, you can add an existing presenter by selecting the dropdown menu.

- 1. Click the Presenters tab
- 2. Click add Presenter



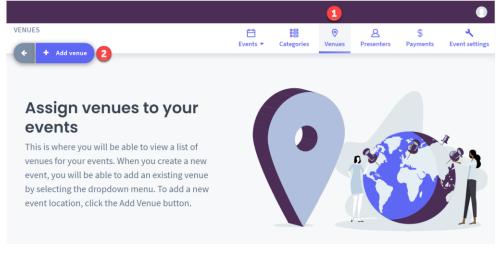
- 3. Fill in the first and last name of the presenter
- 4. Click Save to save changes

							0
ADDING PRESENTER		Ħ	800	0	8	\$	×
← Back		Events 🔻	Categories	Venues	Presenters	Payments	Event settings
_							
ADD PRESENTER 🔓							
Event Presenter Details	First Name*						
Add the first and last name of the event presenter.							
3	Last Name*						
	Last Name						
Cancel							Save
Cancer							Save

4.2.2 Venues

This is where all venues are listed. A new event can be added to an existing venue, or a new event location can be created. To add a new venue:

- 1. Click the Venues tab
- 2. Click add venue



3. Add relevant information PowerHouse Hub ™

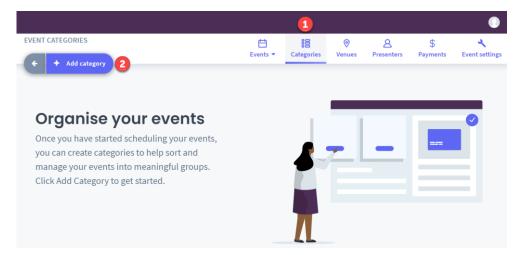
4. Click Save to save changes

							0
ADDING VENUE		Events 🔻	88 Categories	⊘ Venues	8 Presenters	\$ Payments	م Event settings
🗲 Back		Events	categories	venues	rresenters	rayments	Lvent settings
ADD VENUE							
							_
Event Venue Details	Venue Name*						
Add venue details, including the name and address.							
	Street Address 1*						
	Street Address 2						
E E							
	City *		State*		Postco	ode*	
	Status						
	Active	Ŧ					
							_
Cancel						4	Save

4.2.3 Categories

Categories help to sort and manage events into meaningful groups.

- 1. Click the Categories tab in top right menu
- 2. Click add category



- 3. Add an event category title and event category description
- 4. Click Save to save changes

						0
ADDING CATEGORY	Ē	000	0	8	\$	×
+ Back	Events 🔻	Categories	Venues	Presenters	Payments	Event settings
_						
ADD EVENT CATEGORY						
Event Category Details Add a category for your events by adding the name and a short description (if required).	Event Category Title *					
Cancel					4	Save

4.2.4 Adding an Event

- 1. Click the Events tab and click Upcoming/active events from the drop down
- 2. Click Add event



- 3. Complete fields in General Information section. If Show On Frontend tick box is selected, the event will be displayed on the login screen.
- 4. Select if the user will receive an attendance certificate after attending the event
- 5. Click Choose file to upload a thumbnail image
- 6. Select the applicable fee option for the webinar
- 7. If the Webinar has a fee, you are able to set a different price per group. To do this, click add group price, enter a price and assign to a group. This can be done multiple times
- 8. Click Save to save changes

EVENT		Events •	88 Categories	Venues	8 Presenters	\$ Payments	K Event set
Back							
EVENT DETAILS		Ger	neral Descrip	tion Sess	ions Assign t	o Groups 🛛 C	PD Category
General Information Create a new event by adding the event title and the unique identifier. Tick 'Show on	Event Title *						
frontend' to display the event to your users.	Event Unique Ide	entifier					
	3 Status			Event (Category		
	Active		Ÿ	Proje	ct Manager Ess	entials	×
	Show On Fro	ntend					
Attendance Select the certificate users will receive after attending this event.	Certificate No Certificate						٣
Thumbnail	Upload Thumbn	ail					
The thumbnail image should not exceed 500 pixels wide and 500 pixels high. If the image uploaded has other dimensions, it will be resized and stretched accordingly.	5 Choose File	No fil e chos	en				
Registration Cost Select the applicable registration fee option and provide the details as follows.	 This events is This events h 						
	Default Price \$ (eg	g. 100.00)					
	120						
	• If a group is ass for the user	igned to m	ore than one p	rice, the sy	stem will displ	ay the cheap	est price
	Group Price \$ (eg. 99	. 100.00)	Group Assig			×	
	+ Add Group P	rice					

4.2.5 Event Session

- 1. Click on the Sessions link
- 2. Select a venue from the drop down
- 3. Select a presenter from the drop down
- 4. Add the date and time of the event
- 5. Set maximum number of attendees
- 6. Set the status. **Active**: Event is live on the platform and users can register and attend. **Disabled**: Event cannot be seen on the platform.
- 7. Toggle ON to allow registration between start and finish date
- 8. If you have multiple sessions of the same event, click Add Session and fill out the details. This can be done multiple times.
- 9. Click Save to save changes

DEVENT		H	88	0	8	\$	4
Back		Events 🔻	Categories	Venues	Presenters	Payments	Event setting
				•			
EVENT DETAILS		Ger	neral Descript	tion Sess	ions Assign t	o Groups CF	PD Category
Session 1 Details	Venue			Presen	tor		
Provide general information about the details of each session, such as the venue and			Ŧ		se select		- 3
presenter. Each session can be edited independently and can occur on multiple	Start / Finish Da	ate Time *	Max Attend	ees *	Status	5	
dates at several venues.			3		Acti	ve	• 6
	Allow registrati	on between	Start and Finis	h Date			
2	OFF						
					8	+ Add S	ession
Cancel						9	Save

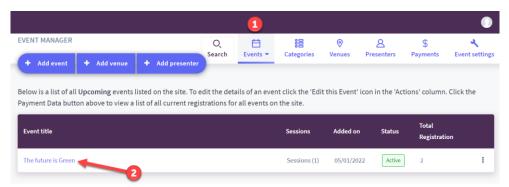
4.2.6 Event Action Buttons

- 1. Allows the Event Details to be edited. Also, there is a new option called Tag this event to a skill, which awards attendees these skills after they attend the event
- 2. Download Registration details
- 3. View Payment Data
- 4. Mark Attendance. This can only be done once the event date has passed
- 5. Duplicate Event
- 6. Delete Event

									0
EVENT MANAGER		a venue Add presenter Search Events Categories Venues Presenters Payments Event settings a venue Add presenter Search Events Categories Venues Presenters Payments Event settings a venue Added on The future is Green Sessions (1) Added on							
+ Add event +	Add venue	+ Add presenter		Events 🔻	Categories	Venues	Presenters	Payments	Event settin
Below is a list of all Uncon	ning events	isted on the site. To	edit the de	tails of an eve	nt click the 'Eo	dit this Ever	nt' icon in the 'A	Actions' colum	nn Click the
	Event title				Ses	sions	Added on	Status	
3,5									Registration
⇙↵▤⊻↵⊗	The future	e is Green			See	ssions (1)	05-Jan-2022	Active	2
2 4 6 Page: 1 of 1									

4.2.6 Event Description

- 1. Click the Events tab and click Upcoming/active events from the drop down
- 2. Click on the event title

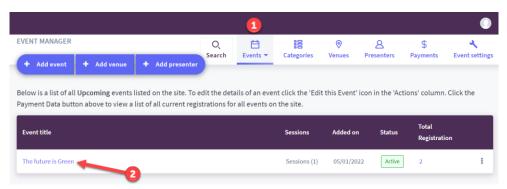


- 3. To add a description, click on the Description link
- 4. Add a summary
- 5. Add a description
- 6. Click Save to save changes

								0
AD	DEVENT		—		0	8	\$	R
-	Back		Events 🔻	Categories	Venues	Presenters	Payments	Event settings
	_			3				
	EVENT DETAILS		G	eneral Descrip	otion Sess	ions Assign	to Groups C	PD Category
	Event Description	Summary						
	Provide general information on the event.	Summary						
	4							
								ti.
		0 / 300						
		Description						
				× В <i>I</i> <u>U</u>				
				B 👷 🏴 🖬				
		Styles -	Size	• <u>A</u> • 🛛 •		- □- ♥-	Source	
	5							
							-	_
	Cancel						6	Save

4.2.7 Assign the Event to Groups

- 1. Click the Events tab and click Upcoming/active events from the drop down
- 2. Click on the event title



- 3. Click on the assign to groups link
- 4. Select the relevant groups
- 5. Click Save

							0
ADD EVENT		_ #	88	0	8	\$	×
← Back		Events 🔻	Categories	Venues	Presenters	Payments	Event settings
					•	3	
EVENT DETAILS		Ger	neral Descrip	tion Sess	ions Assign	to Groups C	PD Category
Recommend Event	Assign event						
Assign this event to any of the following groups. This will show the event on							
'Recommended for you' for your user(s).	Q To search	n, start typing	g a group name				
	🕨 🗌 Human	Resources					
4		Job Posts					
	test			\sim			
Cancel						6	Save

4.2.8 CPD Category

CPD Settings need to be enabled for the CPD Category link to appear. To activate this, navigate to the Setting module, and select CPD from the Platform dropdown.

- 1. Click the Events tab and click Upcoming/active events from the drop down
- 2. Click on the event title

EVENT MANAGER		O Search	Events 🔻	88 Categories	⊘ Venues	8 Presenters	\$ Payments	م Event setting
+ Add event + Add venue +	Add presenter							
					t this Event'	icon in the 'Ac	tions' column	. Click the
Below is a list of all Upcoming events lister Payment Data button above to view a list o Event title					t this Event' Added or		tions' column Total Registrat	

- 3. Click the CPD Category link
- 4. Enter CPD hours
- 5. Select CPD Category
- 6. Click Save to save changes

							0
ADD EVENT		Events 🔻	2000 Categories	⊘ Venues	8 Presenters	\$ Payments	م Event setting:
EVENT DETAILS		Ger	neral Descrip	tion Sessi	ons Assign	to Groups Cl	3 PD Category
					Ŭ		
Assign CPD Categories	CPD hours						
	CPD Categories						
	5 CPD trai	ning					
Cancel						6	Save

4.2.10 Custom Fields

Custom fields allow you to ask the users questions regarding the event. If the user answers the questions incorrectly, they will be automatically blocked from registering for the event.

- 1. Click the Events tab and click Upcoming/active events from the drop down
- 2. Click on the event title

		1					•
EVENT MANAGER + Add event + Add venue + Add presenter	Q Search	Events 🕶	E Categories	⊘ Venues	8 Presenters	\$ Payments	م Event settings
Below is a list of all Upcoming events listed on the site. To e Payment Data button above to view a list of all current regis				t this Event' i	con in the 'Act	tions' column.	Click the
Event title			Sessions	Added on	Status	Total Registratio	on

- 3. Click on the Custom Fields link
- 4. Type your question
- 5. Select a question type
- 6. Select if the question is mandatory
- 7. Click Add Field to add another question
- 8. Click Save to save changes

							0
EDITING EVENT		Ħ	:00	0	8	\$	×.
← Back		Events 🔻	Categories	Venues	Presenters	Payments	Event settings
EVENT DETAILS Ge Current Custom Fields	neral Description	Sessions	3 Custom fields	Assign t	o Groups — W	/aiting list CP	'D Category
Refresh Add More Fields Custom fields allow you to ask the users questions regarding the event. If the user answers the questions incorrectly, they will	Type your questio	on					h
be automatically blocked from registering for the event.	Field Type						
5	Select a questio	on type					Ţ
6	Is this question " Yes No Add Field	Mandatory"	?				
Cancel						8	Save

4.2.11 Waiting List

This is where you can view a list of all the learners who have applied to register for the waiting list for this event, as the maximum attendees has been reached. However, if you go back to the Sessions tab and change the max attendees, you are now able to register the learner to this session by selecting the Add Attendee button when inside the Waiting List tab.

- 1. Click the Events tab and click Upcoming/active events from the drop down
- 2. Click on the event title

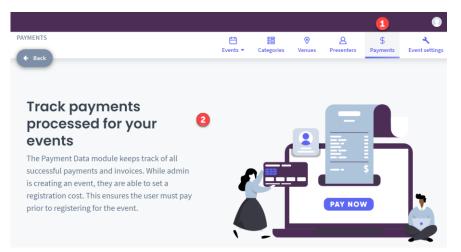
		1					0
EVENT MANAGER	Q Search	Events 💌	20 Categories	⊘ Venues	8 Presenters	\$ Payments	ع Event settings
Below is a list of all Upcoming events listed on the site. To e Payment Data button above to view a list of all current regi				t this Event'	icon in the 'Act	tions' column	Click the
Event title			Sessions	Added on	Status	Total	
				Added on	Status	Registrati	on

- 3. Click on the Waiting list link
- 4. Click add attendee to add them to the event
- 5. Click Save to save changes

NG EVENT Back				Events 🔻	Categories	⊘ Venues	8 Presenters	\$ Payments	Event se
EVENT DETA	ILS	General	Description	Sessions	Custom fields	Assign	to Groups	3 Waiting list C	PD Category
Session	Venue	First Name	Last Name	Email	Ph	one Da	ite	Action	
Session 1	Mediasphere office	Joe	Thomas	joe@nowhe	re.com	05	5/01/2022	Add Attend	ee

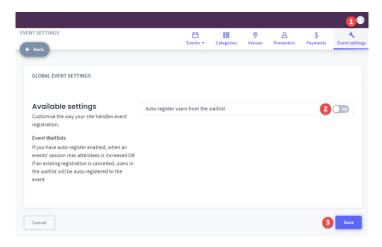
4.2.12 Event Payments

- 1. Click on the payments tab
- 2. Once a learner has purchased an event from their portal the payment information will be displayed



4.2.13 Event Settings

- 1. Click on the Event settings tab
- Toggle ON to enable auto-register from the wait list. This will come into effect when an events' session max attendees is increased OR if an existing registration is cancelled, users in the waitlist will be auto-registered to the event
- 3. Click Save to save changes

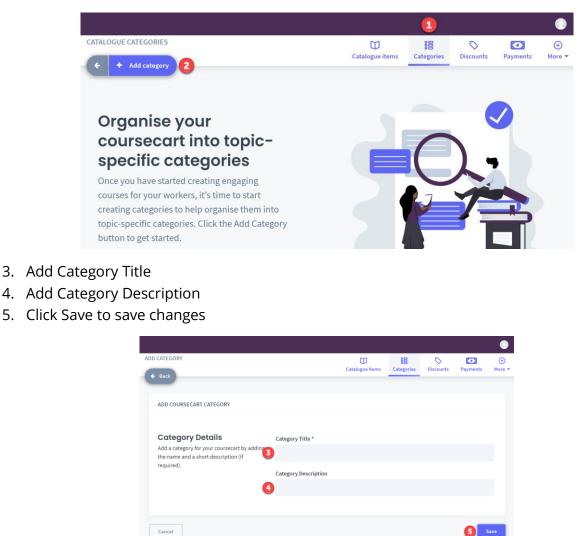


4.3 Course Catalogue

The Course Catalogue allows you to add and sell courses via the Buy Courses module on the learner portal.

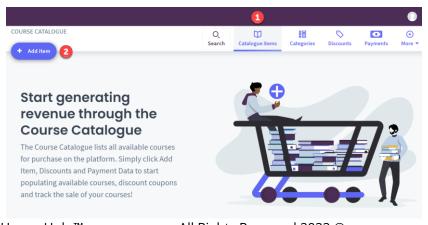
4.3.1 Adding a course category

- 1. Click on the categories tab
- 2. Click add category



4.3.2 Add Course Catalogue Item

- 1. Click catalogue items
- 2. Click add item



- 3. Add a course title
- 4. Set course catalogue status. **Active** means the course can be purchased from learner portal. **Disabled** means the user be able to see the course on the portal.
- 5. Assign Course to the relevant category
- 6. Select tick box to show on the front end of the platform
- 7. Select the if the course if free or has a cost.
- 8. If the course has a fee you are able to set a different price per group. To do this, click add group price, enter a price and assign to a group. This can be done multiple times
- 9. Click Save to save changes

CATALOGUE ITEM		Ø	88	Discounts		
Back		Catalogue items	Categories	Discounts	Payments	
CART ITEM DETAILS	Gene	ral Description	Video / Images	Assign Court	ses Recomm	nei
General Information	Course Catalogue Title *					
Please enter details of the course catalog item you wish to create, including the title						
and status.	Course Catalogue Status		Course Catalo	gue Category		
	4 Active	*	No category	assigned	6	3
	6 Show On Frontend					
Cart Cost To assign a cost to the course catalogue it select the applicable fee option and provi	- macoursecuremas a c					
the details as follows.	Default Price \$ (eg. 100.00)					
	120					
	If a group is assigned to r for the user	nore than one pric	e, the system v	vill display the	cheapest pri	ce
	Group Price \$ (eg. 100.00)	Group Assigne	ed			
	100	Find groups			×	
	8 + Add Group Price					

4.3.3 Assign Courses

- 1. Click Assign Courses
- 2. Select all courses to be assigned to this catalogue item
- 3. Click Save to save changes

						0
ADD CATALOGUE ITEM		Ο	000	\bigtriangledown	$\textcircled{\bullet}$	\odot
¢ Back		Catalogue items	Categories	Discounts	Payments	More ▼
CART ITEM DETAILS	Gener	ral Description	Video / Images	Assign Cour	ses Recomm	nend
Course Selection	HR Basics					
Select all courses to be assigned to this	💟 Workplace Health and S	afety				
catalogue item.	Onboarding					
	Building Relationships v	with Customers				
9	Empathy					
	Active Listening					
	People Management					
	You must select at least one	e course to assign t	o this catalogue	item		
Cancel					3	Save

4.3.4 Course Catalogue action buttons

- 1. Click Catalogue items
- 2. Action buttons include:
 - Edit
 - Download registration
 - Delete

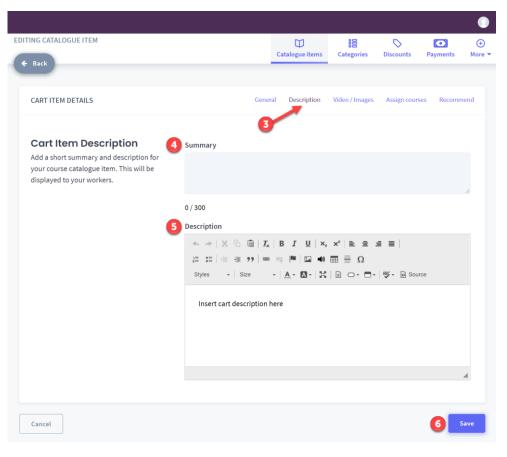
		1				0
+ Add item	O, Search	Catalogue items	2000 Categories	Discounts	Payments	(+) More
Cart item title			Autho	r	Added o	on

4.3.5 Catalogue Description

- 1. Click on the catalogue items tab
- 2. Click the edit button

		1				0
+ Add item	Q Search	Catalogue items	88 Categories	Discounts	Payments	(+) More

- 3. Click on the Description link
- 4. Add a summary
- 5. Add a description
- 6. Click Save to save changes



4.3.6 Adding Videos and Images

- 1. Click on the catalogue items tab
- 2. Click the edit button

			•			
COURSE CATALOGUE	Q Search	Catalogue items	88 Categories	Discounts	Payments	(+) More •
Cart Item title			Author		Added on	
🖉 📩 🛞 Work Place Health and Safety			Matt Ireland		14-Jan-2022	

- 3. Option to enter the URL to an embedded video (YouTube, Vimeo etc). The learner will see the video when clicking the View Details button (of the course) in their portal.
- 4. Click choose file to upload the main image for the course. The learner will see this image when click Buy Courses in their portal.
- 5. Click choose file to upload up to 6 further images. The learner will see this image(s) when clicking the View Details button (of the course) in their portal.
- 6. Click Save to save changes

ING CATALOGUE ITEM		Catalogue items	88 Categories	Discounts	Payments	(+) More
CART ITEM DETAILS	Genera	Description	Video / Images	Assign course	es Recomm	end
Video Please provide the URL to an embedded version of an externally hosted video, if required.	Video URL (Vimeo/YouTube					
Images Each image should be 500 pixels wide and 500 pixels high. If the image uploaded is different it will be resized and stretched accordingly.	Main Image Choose File No file chose Image 1 Choose File No file chose		Image 2 Choose File	No file chose	n	
	Image 3 Choose File No file chose	n	Image 4 Choose File	No file chose	'n	
	Image 5 Choose File No file chose	n	Image 6 Choose File	No file chose	:n	

4.3.7 Recommend (Assign Course to a Group)

- 1. Click on the catalogue items tab
- 2. Click the edit button

		1				0
+ Add item	Q Search	Catalogue items	88 Categories	Discounts	Payments	(+) More
Cart Item title			Author		Added	on
🖉 📩 🛞 Work Place Health and Safety			Matt Ireland		14-Jan-2022	

- 3. Click the Recommend link
- 4. Assign cart item to a group(s)
- 5. Click Save to save changes

						0
EDITING CATALOGUE ITEM		U	800	\Diamond		•
← Back		Catalogue items	Categories	Discounts	Payments	More 🔻
					•	
CART ITEM DETAILS	Gene	ral Description	Video / Images	Assign course	es Recomm	end
Assign to Groups						
Recommend this course catalogue item to any of the following groups. This will show the Catalogue Item on 'Recommended for	Q To search, start typi	ng a group name				
you' for your user(s).	🔻 🗹 Human Resources	;				
	🛛 🗹 Recruitment					
	People Skills					
	Recruit Job Posts					
		````	/			
						_
Cancel					<b>5</b>	ave

#### 4.3.8 Adding a discount coupon

- 1. Click on the Discounts tab
- 2. Enter a code
- 3. Set the discount %
- 4. Enter an expiry date
- 5. Click add coupon

					1		
SCOUNTS					Discounts		↔ More ▼
🗲 Back			Catalogue items	Categories	Discounts	Payments	More *
ADD COUPON		COUPONS					
Code							
Discount (1-99) % Expiry	date						
<b>5</b> A	dd Coupon						

# 4.3.9 View Payment Data

- 1. Click on the Payments tab
- 2. When a course has been purchase it will show here

				1	•
PAYMENTS	Catalogue items	88 Categories	<b>Discounts</b>	Payments	(+) More ▼
2 <u></u>		_			
Ľ	No payment data found.				

### 4.3.10 More - E-commerce Settings

- 1. Click on the More tab
- 2. Click E-commerce setting from drop down

OURSE CATALO	OGUE	O Search	Catalogue items	2000 Categories	<b>Discounts</b>	Payments	Mor
+ Add item				_	2 <	E-commerce	e settin

3. You will be taken to the Payment Settings

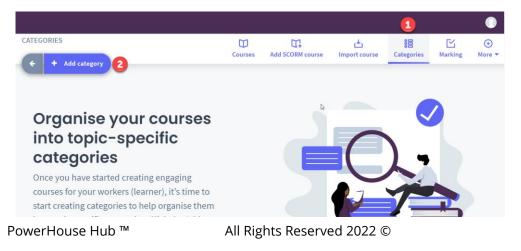
						0
AYMENT SETTINGS		\$ E-commerce	🛋 Display 🔻	₽latform ▼	>  Developers •	Abou
← Back		E-commerce	Display 🔻	Platform *	Developers 🔻	ADOU
PAYMENT GATEWAYS						
				R		
Below are the payment gateways we offer as sta	ndard to integrate with. Click (	on the configure	button to add y	our credentia	ls to get started	
PayPal Configure	stripe Stripe Configure					
PAYMENT SETTINGS						
Tax Settings	Business Number					
Add a Business Number (eg: ABN, GST Number, CRN, Companies House Number						
etc) to show on any invoices produced by the portal.	Business Number Label (to	appear on all inv	voices):			
Customise the currency and currency symbol that will apply to all eCommerce items on the	eg: ABN, GST Number, CRN	I, Companies Ho	use Number etc	:		
site.	Payment Currency			Currency		
Assign and customise a tax percentage that will be applicable to all purchases made on	Australian dollar (AUD)		Ŧ	Symbol		
this site.				\$		
	Include Tax on Purchases	Tax Text		Tax Percer	tage	
	OFF	GST		10 9	ò	
		You can enter a textual name for your tax GST, VAT, etc.				
Alternative Login Page	Display the eCommerce log	in panel in differ	ent areas:			
Adjust the eCommerce login panel.	Default (In the Middle)				~	
	Display the eCommerce iter Use your mouse to drag and			ou desire.		
	,					

# 4.4 Content Publisher

Enhance your workers (learner) skills by adding or importing courses to your online training platform.

#### 4.4.1 Categories

- 1. Click on the Categories tab
- 2. Click Add category



- 3. Add a category title
- 4. Click Save to Save changes

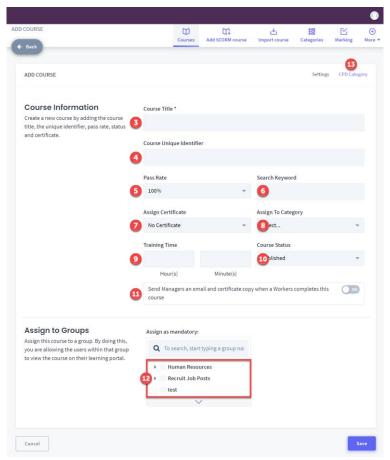
ADD COURSE CATEGORY	Courses	Add SCORM course	یے Import course	88 Categories	Marking	↔ More ▼
ADD COURSE CATEGORY						
Course Category Information Add the title of the new category.	Category Title *					
Cancel					4	Save

#### 4.4.2 Adding a course

- 1. Click on the Courses tab
- 2. Click Add course

		1					0
ONTEN 2 BLISHER + Add course × Reorder courses	Q, Search	Courses	Add SCORM course	산 Import course	88 Categories	Marking	(+) More +
Start creating cour	202						
Enhance your workers (learner) skills b	y adding				66		
or importing courses to your online tra platform. Ensure compliance in your w today. Click Add Course to start!			$\Lambda$			-	

- 3. Add a course title
- 4. Add a course unique identifier if needed
- 5. Set the pass rate for the course
- 6. Add a search keyword to help learners find the course easily
- 7. Assign a certificate
- 8. Assign to a category
- 9. Enter the training time needed to take the course
- 10. Set Course Status. Published: Learner will be able to take the course. Draft: Learner won't be able to see the course in the portal
- 11. Toggle Yes to email send the manager a copy of the course certificate once the learner has completed the course
- 12. Select the group(s) that you want to assign the course to appear on the learner portal
- 13. When all Settings have been filled out, click CPD Category link



- 14. Enter the CPD hours
- 15. Select the CPD Category
- 16. Click Save to save changes

						6
		CT Add SCOPM course	<u>ب</u>	88 Catagorias	Marking	↔ More
_	Courses	Add SCORM Course	Import course	Categories	Marking	MOR
				Settings	CPD Cate	gory
CPD hours						
14 0						
						_
		ading				L
		ading				L
						_
	CPD hours 14 0 CPD Categor Categor Categor Categor Categor Categor Categor	CPD hours CPD Categories CPD Category 1	CPD hours CPD categories CPD Category 1 S Professional Reading	CPD hours CPD Categories CPD Category 1 SP Professional Reading	Course     Add SCORM course     Import course     Categories       CPD hours       0     CPD Categories       CPD Categories       CPD Category 1     Settings	CPD hours CPD Categories Category 1 S Professional Reading

# 4.4.3 Building the course skeleton

- 1. Click on the Courses tab
- 2. Click edit course

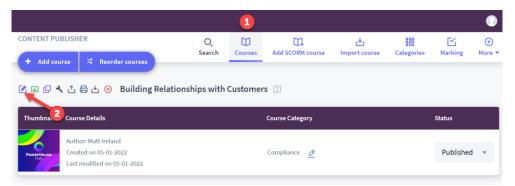
		1					
CONTENT PUBLISHER  + Add course	Q Search	Courses	CT Add SCORM course	لی Import course	2 Categories	└ Marking	(+) More ▼
[ 프 다 Վ 슈 클 쇼 ⓒ Building Relation	ships with	Customer	'S I Course Category			Status	
Author: Matt Ireland Created on 05-01-2022 Last modified on 05-01-2022			Compliance 💋			Published	i v

- 3. Click add section to add multiple sections
- 4. Click to edit the section name, enter the section name and then click the save icon
- 5. Use section icons to build the course section as required. Section icons include:
  - Re-arrange Items
  - Add Section Page
  - Add Section Practice Test Practice tests are not graded and will not affect the learners overall grade
  - Add Section Test
  - Add Section Scenario
  - Add Section Survey
  - Delete Section

						0
EDITING COURSE: ONBOARDING	Courses	CT Add SCORM course	لطے Import course	88 Categories	└ Marking	(+) More
	• 🗹	🗹 👛 📼				
5 ス 🗅 ∠ 🗹 📽 ☆ ⊗ Rename Section 🗉 ◀━━	4					
🕞 🖍 🏂 🕻 🗐 🕁 🛞 Rename Page 🝸						
ト 🖍 🌣 🕻 🗐 🛃 🛞 Rename Page 🝸						

#### 4.4.4 Course Actions Items

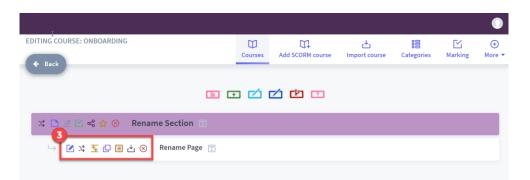
- 1. Click on the Courses tab
- 2. Click edit course



- 3. Use page icons to view your course. Page icons include:
  - Edit this page -insert templates and creative assets through the CK editor
  - Re-arrange items re-order pages in the section
  - Move this page move the page into another section

```
PowerHouse Hub ™
```

- Duplicate this page copy the page
- Preview this page view the course from the back end
- Import SCORM to this page you must have SCORM files to use this option
- Delete this page



### 4.4.5 Creating Course Pages Using the CK Editor

- 1. Click the edit this page icon
- 2. Create pages similar a word doc using CK editor options
- 3. Click Save to save changes or Save and Close when finished

						•
EDITING COURSE: ONBOARDING	Courses	Add SCORM course	년 Import course	20 Categories	Marking	↔ More ▼
← Back	courses		mport course	categories	marking	MOTO -
	<b>D</b>	🗹 🖆 🗊				
ス 🗅 🖉 📽 😭 🛛 Rename Section 🗉						
🕞 🔀 💥 🛬 🗗 🗏 占 🛞 Rename Page 🝸						•
1			]E 99   000 on∑   ⁴	⊎∣⊑⊒ =0 ⊞	Ω	ľ
Insert content here						
I						
body p						
Close			3	Save & Close	Save	

### 4.4.6 Creating Course Pages from a Template

- 1. Click the edit this page icon
- 2. Click the Templates icon, select desired template and add page content
- 3. Click Save to save changes or Save and Close when finished

						•
EDITING COURSE: ONBOARDING	Courses	Add SCORM course	년 Import course	20 Categories	<b>⊡</b> Marking	⊕ More ▼
+ Back						
	• 🗹	🗹 🛍 🗈				
ス 🗅 🧷 🗹 😪 🏠 🛞 🛛 Rename Section 📳						
🛶 🖸 🌣 🕵 🗗 🗏 🛃 🛞 🦷 Rename Page 🝸						
			E 99 000 m2	• 🖬 🖷	$\equiv \Omega$	
Styles - Size - 🛕 - 🔯 - 💈	Templates	-				
2						
						-
body h3						
					_	4
Close			3	Save & Close	Save	

# 4.4.7 Uploading images and audio files

- 1. Click the edit this page icon
- 2. Click the image or audio button (depending on, which option you need)
- 3. Click Browse Server

EDITING COU	RSE: ONBOARDING		Courses	Add SCORM course	ٹے Import course	88 Categories	└ Marking	↔ More ▼
				선 변 🖂				
쟈 🗅 🧕	2 🗹 希 🏠 🗵	Rename Section 🔳						
→ [	☑ ⇉  @ @ 。	🖞 🛞 Rename Page 🝸				2		
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		Image Properties		×				
		URL Alternative Text	Browse	Gerver 3				
		Width Height						
		Alignment None Align Left Align Ce	_	gn Right				
	body div							
	body div							
	Close					Save & Close	Save	

- 4. Click New Folder it's best practice for each Course should have its on media folder.
- 5. Name the folder and click Create New Folder

ASSET MANAGER - FILE BROWSER			
Konned	CREATE NEW FOLDER	×	
Q Keyword	New folder name: Building Relationships with Customers		Search
The Asset Manager Module allows you	®		•
Current Folder : /	Create New F	older	
		Refresh	

- 6. Click the new folder
- 7. Click Upload File
- 8. Click Choose File and select relevant file from your hard drive
- 9. Click Upload

ASSET MANAGER - FILE BROWSER		
UPLOAD NEW FILE (IMAGES)	×	
Q, Keyword		
Choose a file to upload	5	
Choose File No file chosen		
The Asset Manager Module allows you		
Current Folder: /	(2) Upload	
Building Relationships		
with Customers		
		2

#### 10. Hover over file and click Insert

ASSET MANAGER - FILE BI	ROWSER					
Q Keyword		File Type Select all file types	×		Search	
The Asset Manager Module	e allows you to upload and organi:	se files that are required throughout the platfo	orm.			
Current Folder : / Building	Relationships with Customers /					
Building Relationships with Customers	Customer Relationshi p.png 10 INSERT DELETE					
				Refresh	Upload File	New Folder

11. Select centre align and click OK

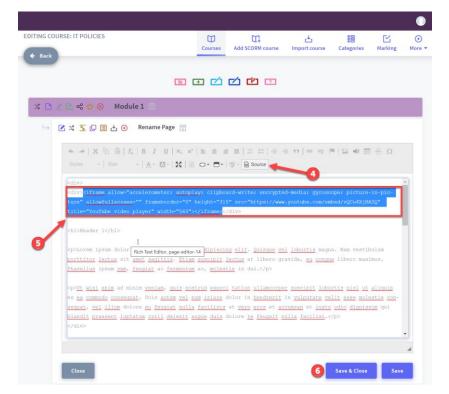
Image Properties		×
URL		
/file/1/Customer Relation	nship.png	Browse Server
Alternative Text		
Width	Height	
742	568	
Alignment None Align Lef	t OAlign Cen	iter 📃 Align Right
	11	Cancel

# 4.4.8 Adding a video

- 1. Click the edit this page icon
- 2. Click the Templates icon
- 3. Click page start, full-width video

						۲
EDITING COURSE: PEOPLE MANAGEMENT	Courses	Add SCORM course	import course	88 Categories	Marking	⊕ More ▼
( Back						
	⊡ 🗹 (	<b>Zi (Ľi</b> ) 📼				
치 🖸 🖉 📽 🕸 🛞 Rename Section 🙃						
다 🛛 🌣 🛣 🗗 🗐 🕁 🛞 Rename Page 🝸						
• *   X & @   Ix   B I U   X. × [	k 2 3	■   # <b>#</b>   # 4	E 99   00 100  M	🖬 🐠 🌐	Ξ Ω	
Paragraph - Size - A - M - R C	o- 8- 19	- O Source				
Insert con Content Termines	tor	×				
2 Page Start, Full Will Start you content page with image.	th Image ge with a stand o	out full-				
3 Department and the set of the s	th Video ge with a stand o	out full-				
Replace actual contents						
body p		Cancel				
Close				Save & Close	Save	

- 4. Click Source
- 5. Replace code between <div> and </div> tags with the embed code for the video that you would like to use (as highlighted in image)
- 6. Click Save & Close



## 4.4.9 Course Settings

After you've added a course, a few additional options can be configured in the course settings.

- 1. Click the courses tab
- 2. Click course settings icon

CONTENT PU	BLISHER	Q Search	Courses	Add SCORM course	년 Import course	88 Categories	Marking	() More
+ Add cou	rrse 🧏 Reorder courses							
2 🖬 🗗 🖣	🗘 🖶 🗄 🛞 🛛 People Mana	gement 🗉						
Thumbnail	Course Details	gement I		Course Category			Status	

- 3. Using the dropdown menu, select the course Expiration type. By selecting this, your users will lose access to the course after a specified amount of time has passed.
- 4. Using the dropdown menu, select the course Re-Induction type. Select this if a user needs to re-submit a course after a specified amount of time has passed. This generally applies to users who complete annual re-induction courses, such as Workplace Health & Safety.
- 5. A training based skill can be acquired when completing a course that has a skill assigned.
- 6. Click Save to save changes

Course Expiration	Select Course Expiration Type
Using the dropdown menu, select the course Expiration type. By selecting this, you are choosing to have your user/s lose access to a	Does not expire *
certain course after a specified amount of time has passed.	
Re-Induction	Select Re-Induction Type
Using the dropdown menu, select the course Re-Induction type. Select this if a user is to submit a course after a specified amount of	Disabled
submit a course after a specified amount of time has passed. This generally applies to users who complete annual re-induction courses, such as Workplace Health & Safety.	
Assign to Groups	Assign as mandatory:
Assign this course to a group. By doing this, you are allowing the users within that group to view the course on their learning portal.	Q To search, start typing a group nz
to view the course on their learning portal.	Human Resources
	Recruit Job Posts     test
	$\checkmark$
Assign CPD Hours and	CPD hours
Categories	0.00
	CPD Categories
	CPD training
Tag this course to a skill A training based skill can be acquired when completing a course that has that skill	Click to select one of more skills or just start typing to search
assigned. You can add and edit the skills by visiting the <u>skills area in the Framework module</u> ,	

### 4.4.10 Export Course

- 1. Click the Courses tab
- 2. Click the export button
- 3. Click export course and a zip file will download to your hard drive

		1					
CONTENT PUBLISHER	O,	Ø	CT.	<u>ٹ</u>	800	Ľ	٠
+ Add course X Reorder courses	Search	Courses	Add SCORM course	Import course	Categories	Marking	More 🔻
🗹 🖬 🗗 🥄 🖆 🖶 🖄 IT Policies 🗉							
EXPORT COURSE 2							
<b>Export Course</b> Exporting a course will save all content, assessments, to a single file that can be used to import it again.							
Cancel					<b>3</b> Ex	port Course	

# 4.4.10 Add SCORM Course

Our platform allows the import of SCORM with pass or fail reporting capabilities. There are two options for exporting SCORM. These files can either be added to the page, which allows for the addition of other course pages, or as a separate course entirely, which will have the course sitting by itself. Should you wish to have more detailed reports, it is recommended to use our platform to build your assessments.

To populate a SCORM course 'by itself' with no other course pages required, steps are as follows:

- 1. Click Add SORM course tab
- 2. Add a course title
- 3. Add a course unique identifier if needed
- 4. Add a search keyword to help learners find the course
- 5. Click Choose File to upload a SCORM file
- 6. Select the SCORM version
- 7. Select tick box for SCORM to open in a pop up window when workers access it
- 8. Assign a certificate
- 9. Assign to a category
- 10. Enter the training time needed to take the course
- 11. Set Course Status. Published: Learner will be able to take the course. Draft: Learners wont be able to see the course in the portal
- 12. Toggle Yes to email send the manager a copy of the course certificate once the learner has completed the course
- 13. Select the group(s) that you want to assign the course to appear on the learner portal
- 14. Click Save to save changes

Add a SCORM course by entering the course 2 title, the unique identifier, the SCORM version, and upload the SCORM file. Uploa 5 Ch Maxim (2ip) 7 Op Check	e Title * e Unique Identifi d Scorm Object coose File No filk		للسومد دسته Search keyw	Categories Settings	CPD Category
Basic Information Add a SCORM course by entering the course (2) (2) (2) (2) (2) (2) (2) (3) (2) (3) (4) (4) (5) (6) (6) (7) (9) (7) (9) (8) (8) (8) (8) (8) (9) (9) (9) (9) (9) (9) (9) (9	e Unique Identii d Scorm Object oose File No file		Search keyw		CPD Category
Basic Information Add a SCORM course by entering the course (2) (2) (2) (2) (2) (2) (2) (3) (2) (3) (4) (4) (5) (6) (6) (7) (9) (7) (9) (8) (8) (8) (8) (8) (9) (9) (9) (9) (9) (9) (9) (9	e Unique Identii d Scorm Object oose File No file		Search keyw		(PD Category
Add a SCORM course by entering the course 2 title, the unique identifier, the SCORM version, and upload the SCORM file. 3 Uploa 5 Cht Maxim (zip) 7 0 pc Check Assigr 8 No C	e Unique Identii d Scorm Object oose File No file		Search keyw	ord	4
titile, the unique identifier, the SCORM 2 version, and upload the SCORM file. 2 3 Uploa 5 Che Maxim (zip) 7 0 op Check Assign 8 No C	d Scorm Object oose File No file		Search keyw	ord	4
3 Uploa 5 Ch Maxim (zip) 7 Op Check Assign 8 No C	d Scorm Object oose File No file		Search keyw	ord	4
5 Ch Maxim (2ip) 7 Op Check Assign 8 No C	oose File No file				•
5 Ch Maxim (2ip) 7 Op Check Assign 8 No C Traini	oose File No file				
Maxim (zip) 7 Op Check 8 No C Traini		e chosen		Scorm Version	•
(zip) Check Assign 8 No C Traini	num file size is 50			<ul> <li>Scorm 1.2</li> <li>Scorm 2004</li> </ul>	6
Check Assign 8 No C Traini		00 Megabytes. Accep	table file type:	Edition	+ 310
Assign 8 No C Trainin	en Scorm in ne				
8 No C		o open in a popup wi			
Traini	n Certificate		Assign To Cat	tegory	0
	Certificate I		Select		
<b>60</b>	ng Time		Course Statu	s	-
			Published		
	Hour(s)	Minute(s)			
12 Send cour		mail and certificate o	opy when a Work	ers completes this	S NO
Assign to Groups Assig	gn as mandatory	y:			
0	To search, sta	art typing a group na			
that group to view the course on their learning portal.	Human Res	ources	1		
<b>(B)</b> •	Recruit Job	Posts			
	test		1		
		~			

### 4.4.11 Import Course

- 1. Click Import course
- 2. Click choose file to upload the course zip file from your hard drive or drag and drop the course zip file into the box
- 3. Assign a course certificate from drop down box
- 4. Click import all

PORT COURSE(S)	Ŭ	Cî.	4	:00	Ľ	÷
Back	Courses	Add SCORM course	Import course	Categories	Marking	More
IMPORT A NEW COURSE/S						
						_
	Drag and drop	files here				
	or					
Q	Choose I	File				
	Maximum file size is	500 Megabytes				
If you would like to assign a certificate to Assign Certificate	the course/s, please choose one f	rom the list below.				
No Certificate	¥	]				
it_policies_7.3.zip			Done		6	3

### 4.4.12 Marking

- 1. Click the Marking tab
- 2. Click the edit icon for the course you would like to mark

								1	
ARKING ASSES	SMENTS			Courses	Add SCORM course	止 Import course	88 Categories	Marking	(+) More
Submit Date	Mark	Worker (Learner) ID	Name	Assessn	nent				
22/07/2021	1	18	Sarah Cook	Sales 1	actics and Approach	Management_ Sho	wcase - Assess	ment	
22/07/2021	1	11	Jason Holmes	Sales 1	actics and Approach	Management_ Sho	wcase - Assess	sment	
22/07/2021	1	15 2	Rayna Greenburg	Sales 1	factics and Approach	Management_ Sho	wcase - Asses	ment	
07/07/2021	1	13	Stacey Phipps	Sales 1	actics and Approach	Management Test	1 - Assessment		

- 3. Select if the answer is correct or incorrect
- 4. Click Save to notify the user

DITIN	G ASSESSMENT MARKING	Courses	Add SCORM course	بلے Import course	88 Categories	Marking	(+) More
Q1	It is best practice to wine and dine your potential clie User Answers : False Correct Answers : False	ents in order to ma	ke a sale.		User Ar Correct	nswer is : t	
Q2	You are a sales rep seeking to build your portfolio. W Choose the most relative response. User Answers : b) Review your current business strat development currently used.				Correct	nswer is : t	
Q3	Correct Answers : b) Review your current business st business development currently used. Why aren't you able to wine and dine clients to achie		our approach based o	ff successful		nswer is :	
	User Answers : Naughty Correct Answers : It is not best practice to constantly be using business bottom line, prior to a potential return on investmen		butcomes, based on th	is hitting your	Selec	t value	¥
Q4	What is the correct order for a sales pitch and outcon User Answers :	ne?			User Ar	nswer is :	

## 4.4.13 More – Global Settings

- 1. Click on the More tab
- 2. Click E-commerce setting from drop down
- 3. You will be taken to the System Setting

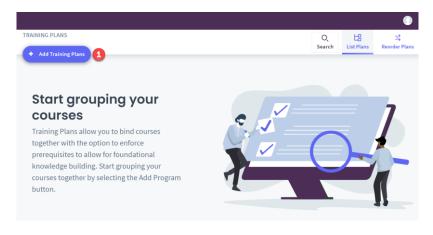
MSETTINGS	S III E-commerce Display → Pl	atform • Developers •				
Back	E-commerce Display *	atform • Developers •				
SYSTEM SETTINGS	Global	Registration/Forms Security				
Homepage Template Change the home page template.	Homepage Template Visitor	*				
	Recruit integration					
	Redirect all home page visitors to the Communities homepage	ge instead				
Username Settings	Automatically generate a suggested username in "firstname.	lastname" format 🔵 🕫				
Aodify the behaviour of user forms.	Force the user to use the suggested username					
	Allow managers to modify usernames					
	Allow businesses to modify usernames	ND				
Cookie Policy	B I   # # #   # ~					
You can provide your own cookie policy if you're not happy with the default version. A cookie policy is required for all sites and cookies must be allowed by the end-use in order to login and/or access any part of this platform.	We use cookies to collect and analyse information to give ence on our website. If you continue, we'll assume that you all cookies on the website. To find more about our cookie nation	u are happy to receive				
Course Settings						
L. Enable or disable the ability for admins to	Enable PDF Export	YES				
export a course to PDF that can then be distributed to workers. 2. Enable or disable the ability for admins to mark courses as complete for worker, randidate and visitor user types. Note: This is	Allow courses to be 'auto-marked' by Admin					

# 4.5 Training Plan Manager

Training Plans Manager allows you to bind courses together with the option to enforce prerequisites to allow for foundational knowledge building.

#### 4.5.1 Adding a training plan

1. Click Add Training Plans



- 2. Add a title for the training plan
- 3. Select a recommended timeframe that you would like the learner to complete the training plan in
- 4. Click choose file to upload an image from your hard drive
- 5. Assign a certificate
- 6. Toggle Yes to show the certificate on the learner dashboard once awarded
- 7. Toggle Yes to ensure courses must be completed one at a time
- 8. Select a re-induction option if you would like the learner to re-submit a training plan after a specified amount of time has passed. This generally applies to users who complete annual re-induction courses, such as Workplace Health & Safety.
- 9. Add a summary
- 10. Add a description that will be displayed to the learner
- 11. Click Save to save changes

TRAINING PLAN		
Back		u
ADD TRAINING PLAN		
ADD TRAINING PLAN		
Training Plan details	Training Plan Title *	
Provide general information on the training plan details.		
_	Recommended Timeframe Main Image	
E	Not Applicable    Choose File No file chosen	
	Assign Certificate Enable Prerequisites *	
E C	No Certificate    Courses must be completed  one at a time	NO
G	If applicable, show this III applicable, show this IIII applicable (learner) dashboard when awarded.	
Re-Induction	Select Re-Induction Type	
Using the dropdown menu, select the course Re-Induction type. Select this if a user is to re-		Ŧ
submit a training plan after a specified amount of time has passed. This generally	Induction Date	
applies to users who complete annual re- induction courses, such as Workplace Health	10/01/2023	
& Safety.	(DD/MM/YYYY)	
	Reset Induction Allow users to reset their induction 1 month before their re-induction date	NO
	Induction Reminders	
	1 month before	D
	1 week before	D
	1 day before	D
	On the day	D
Description Provide a short description for your Training	Summary	
Plan. This description will be displayed to your workers (learner). Your description should have 75 to 150 words.		11
	0 / 300	
1		
	◆ ☆   X ℃ 園   X   B I リ × x ²   E 초 ゴ ≡   に に   非 非 33   ■ 型 ■ 国 ■ 田 Ξ Ω	
	Styles -   Size -   🛕 - 🚺 -   💥   🖻 🔾 - 🚍 -   💖 - 🕞 Source	
		4
Cancel		Sav

# 4.5.2 Tagging a skill to a training plan

1. Click the training plan title

				0
TRAINING PLANS     Add Training Plans		Q Search	List Plans	्रे Reorder Plan
Title 1	Status	Added		Modified
_ × ⊗ IT Security	Active	15-Jan	-2022	15-Jan-2022

2. Click the general link

- 3. Type in the skill(s) the learner will achieve after completing the training plan
- 4. Click Save to save changes

TRAINING PLAN DETAILS		2 General	Description	Assign courses	Assign to groups
General Information	Main Image				
Provide general information on the training plan details.	Choose File No file chosen				
	Training Plan Title *				
	IT Security				
	Recommended Timeframe		Training Pla	n Status *	
	2 Months	*	Active		*
	Assign Certificate		Enable Prer	equisites *	
	No Certificate	*	Courses m one at a ti	ust be completed	YES
	If applicable, show this certificate on the worker dashboard when awarded.	YES			
Re-Induction Using the dropdown menu, select the course Re-Induction type. Select this if a user is to re-	Select Re-Induction Type Disabled				•
submit a training plan after a specified amount of time has passed.This generally applies to users who complete annual re- induction courses, such as Workplace Health & Safety.					
Tag this Training Plan to a skill	3 Click to select one of more ski	lls or just sta	art typing t		
A training based skill can be acquired by					
completing a Training Plan that has that skill assigned. You can add and edit the skills by visiting the skills area in the Framework module.					

# 4.5.2 Assign Courses

1. Click the training plan title

TRAINING PLANS		O v Search	List Plans Reorde	·
+ Add Training Plans				
+ Add Training Plans	Status	Added	Modified	

- 2. Click the Assign courses link
- 3. Select the course(s) that will be assigned to the training plan
- 4. Click Save to save changes

T TRAINING PLAN		List F
		2
TRAINING PLAN DETAILS	Gene	eral Description Assign courses Assign to groups
Assign Courses Select the courses that will be assigned to	Course	CPD Hours
this Training Plan. Use the search filters to identify your courses with competency-	HR Basics	0.00
tagged assessment.	Workplace Health and Safety	0.00
	Onboarding	0.00
	Building Relationships with Customer	rs 0.00
	Empathy	0.00
	Active Listening	0.00
	People Management	0.00
	Cyber Security	0.00
	<ul> <li>Risk Management</li> <li>IT Policies</li> </ul>	0.00
		0.00

# 4.5.3 Assign Training Plan to Groups

1. Click the training plan title

			•
TRAINING PLANS  Add Training Plans		Q Search Li	t Plans Reorder Plans
Title 1	Status	Added	Modified
<u> </u>	Active	15-Jan-202	2 15-Jan-2022

- 2. Click Assign to Groups link
- 3. Select to group(s) you want to assign the training plan to
- 4. Click Save to save changes

TRAINING PLAN		t
Back		List
TRAINING PLAN DETAILS	General Description Assign courses	2 Assign to groups
Assign to Groups		
Assign this Training Plan to a group. By doing this, you are allowing the users within that group to view the Training Plan on their	<b>Q</b> To search, start typing a group name	
learning portal.	Human Resources     Information Technology	
	People Skills	
	Recruit Job Posts	
	~	1
		-
Cancel		4 Save

### 4.6 Framework Manager

Frameworks allow you to bind courses and mandatory compliance and credential files together with the option to enforce prerequisites to allow for foundational knowledge.

Before building a framework you will need to make sure you have already created the required training courses and the required file uploads (skill evidence, compliance, credentials and vaccination).

#### 4.6.1 Adding a category

1. Click the categories button

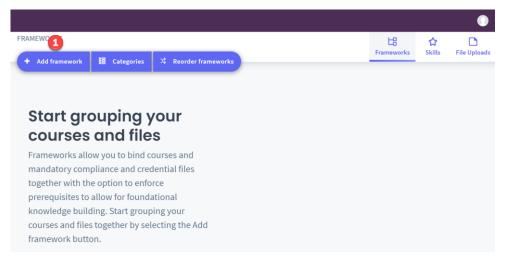
						0
MEWORKS	1			8	☆	
Add framework	😫 Categories	戏 Reorder frameworks	)	Frameworks	Skills	File Uploads
Start gro	ouping y	/our				
courses	and file	S				
rameworks allo	ow you to bind c	ourses and				
nandatory com	pliance and cree	dential files				
ogether with th	e option to enfo	rce				
rerequisites to	allow for found	ational				
nowledge build	ding. Start group	oing your				
ourses and files	s together by sel	ecting the Add				
	0					

- 2. Enter the category name
- 3. Click Save to save changes

FRAMEV	EDIT FRAMEWORK CATEGORIES	×		<b>File Uploads</b>
+ A	Framework categories	+ Add new		
St	Name 2			
<b>C</b> Frai mai	Cancel	3 Save		
Ŭ	ether with the option to enforce prerequisites			

#### 4.6.2 Adding a framework

1. Click Add framework



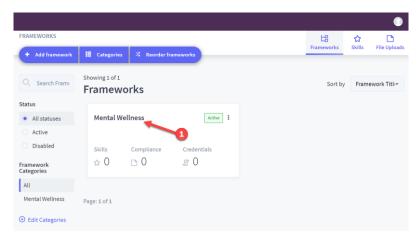
- 2. Add the framework title
- 3. To upload a thumbnail for the framework, click choose file and upload an image from your hard drive
- 4. Set the status. Active means the framework is live and ready for learners to complete. Disabled means the leaner and won't be able to see on their portal
- 5. Select the category that you just created in the last step from the drop down list
- 6. Click Save to save the changes

RAMEWORK		 Frameworks	<b>☆</b> Skills	File Uploa
ADD FRAMEWORK		Set	ttings D	escription
Framework introduction Framewor Provide a title and an image.	rk title			
Thumbna 3 Choose	il File No file chosen			
General Settings Status	Category			
Select the Status and Category associated to 4 Active this Framework.	Please Select Please Select Mental Wellness			•

## 4.6.3 Skills

Please note that training based skills (courses) and skills evidence (file uploads) need to be created before you can complete the skills section.

1. Click on the Framework title

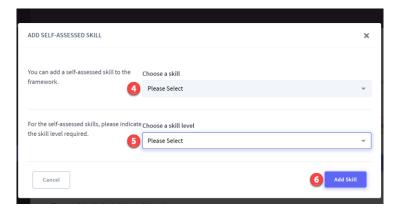


- 2. Click on the Skills tab
- 3. Click Add skill to add a self assessed skill. This is where the user can assess themselves against a desired skill (basic, intermediate and advanced). A Manager can verify the skill level and change/update it at any time.

						_
- Exit						
					Active 👻	1
General Skills File Uploads Work History	Job Match	Work Ready Shield	Workflows	Assign		
SKILLS		Dont forget to cl	ick 'Save' below	if you make	e anv changes	
		-				
				_		
Self Assessed skills				3		
Add a skill the user should assess themselves				_		
on.						
There are 3 levels - basic, intermediate and advanced.						
A Manager can verify the skill level and change/update it at any time.						
To Add a self assessed skill to the framework, click on 'Add Skill'						
Click on the self-assessed skill title to edit						

- 4. Choose a skill that the learner can self assess against
- 5. Set the skill level that you require for this position

6. Click add skill



- 7. To add further skills, click add skill again
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					•
FRAMEWORK Mental Wellness					Active 👻
eneral Skills File Uploads Work	History Job Match	Work Ready Shield	Workflows	Assign	
SKILLS				010 WA	
SKILLS		Dont forget to cli	ck 'Save' below	if you make	e any changes
				0	+ Add Skill
Self Assessed skills Add a skill the user should assess themselves	Self-assessed skills 1				TO AND SAIL
on.					
There are 3 levels - basic, intermediate and	People Skills Empathy				
advanced.					
advanced. A Manager can verify the skill level and	Target Level				
A Manager can verify the skill level and	Target Level	•••			
A Manager can verify the skill level and change/update it at any time. To Add a self assessed skill to the framework,	Target Level				
	Target Level	•• •			

8. Select the training-based skills (courses) that the learner can complete and give them the skills that they need for the role.

Training based skills	Courses assigned:	
Assign training that have the required skills. You can search by the relevant training name or by skill or skill categories.	Q Search Course Q Search Skill	All Skill Categories 👻
A training based skill is acquired when the training that has that skill assigned, has been	🔍 🌠 Workplace Health and Safety	Communication
completed.	🖾 🋃 Empathy	Empathy
You can add and edit the skills visiting the	Active Listening	Active Listening
skills area. You can add and edit your courses in the	People Management	Active Listening Empathy + more
Content Publisher.	$\checkmark$	
You can add and edit your events in the <u>Event</u> <u>Manager</u> .		
You can add and edit your webinars in the Webinar Manager.		
You can add and edit your Training Plans in the <u>Training Plan Manager</u> .		

- 9. Select the skills evidence files (File Uploads) that will enable the learner to upload their evidence showing that they can perform the skill properly. Their manager can then review and confirm the learner has the required skill.
- 10. Click Save to save changes

Empathy People Management
Active Listening

#### 4.6.4 File Uploads

Please note that you will need to create (file uploads module) the required compliance, credential and vaccination evidence that need for this role. In the below example credential files aren't appearing because they haven't been created.

- 1. Click the File Uploads tab
- Select the required compliance files required for the role PowerHouse Hub ™ All Rights Reserved 2022 ©

- 3. Select the required vaccination files required for the role
- 4. Click Save to save changes

FRAMEWORK Mental Woness	Active 👻
	inauny sourmaturi noin-neany-sinau noinnonas naangi
ASSIGN FILE UPLOADS	Dont forget to click 'Save' below if you make any changes
Select the required compliance files to be uploaded by the users with this framework assigned. You can add and edit your compliance files visiting the <u>File Uploads</u> module.	Compliance files required:  Compliance files required:  Compliance files required:  Police Check  V
Assign vaccination files Select the required vaccination files to be uploaded by the users with this framework	Vaccination files required: <b>Q</b> To search, start typing a file name
assigned. You can add and edit your vaccination files visiting the <u>File Uploads</u> module.	Vaccination 1st dose
	~

## 4.6.5 Work History

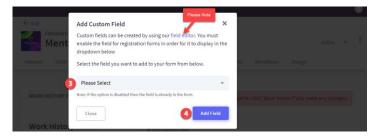
In this section you can add questions about the candidate's work history.

- 1. Click the work history tab
- 2. Click add custom field

General	Skills	File Uploads	Work History	Job Match	Work Ready Shield	Workflows	Assign	
WORK H	ISTORY PRO	DFILE			Dont forget to o	lick 'Save' below	if you make ar	ny changes
Add que history t	hat are relev	t the candidates w vant for this job.	ork	2 d Custom Field				
module.	, .	the <u>User Accounts</u>						
History of	questions ar	d to use for the Wo e dropdowns as th b Match Profile.						

- 3. Select the question that you want to add from the drop down box
- 4. Click add field

Please note, if you haven't already created a question, you can do so by clicking the field editor link



- 5. Choose the required answer from the drop down box
- 6. Click add custom field to add multiple questions
- 7. Click Save to save changes

Exit FRAMEWORK Mental Wellness				Active 👻
eneral Skills File Uploads Work	Job Match	Work Ready Shield	Workflows Assign	1
WORK HISTORY PROFILE		Dont forget to o	lick 'Save' below if you ma	ake any changes
Work History Profile Add questions about the candidates work history that are relevant for this job.	+ Add Custom Field			
You can add and edit the custom fields required by visiting the <u>User Accounts</u> module.	Do you have	experience metal wellbe	ing *	<ul> <li>✓</li> <li>✓</li> </ul>
The best custom field to use for the Work History questions are dropdowns as these can scored in the Job Match Profile.				
Cancel		Ð		7 Save

### 4.6.6 Job Match

Select the items and the corresponding percentage to create your Job Match Profile. This is displayed in the pipeline for each candidate.

- 1. Click the Job Match tab
- 2. Select the items you would like in your Job Match and rate the importance as a percentage. All selected items must add up to 100%
- 3. Click Save to save changes

Exit FRAMEWORK Mental Wellness	0	Active 👻
General Skills File Uploads Work	History Job Match Work Ready Shield Workflows As	sign
JOB MATCH PROFILE	Dont forget to click 'Save' below if y	ou make any changes
Job Match Profile Add items and the corresponding percentage to create your Job Match Profile. This is	2 Skills Evidence File Uploads	Percentage
displayed in the pipeline for each candidate. Important Notes: When adding the work history items to the job match profile, please choose the minimum option the candidate	<ul><li>Active Listening</li><li>Empathy</li></ul>	10
can choose to receive the match score.	Self Assessed Skills	Percentage
	Empathy	50
	Completed Courses	Percentage
	C Active Listening	
	Empathy	20
	Total Percentage of Job Match	
	Total must add up to 100	
Cancel		3 Save

## 4.6.7 Work Ready Shield

Add items to your Work Ready Shield to display the core capabilities and credentials that are required for the candidate to be Work Ready. The shield will be displayed in the pipeline for each candidate.

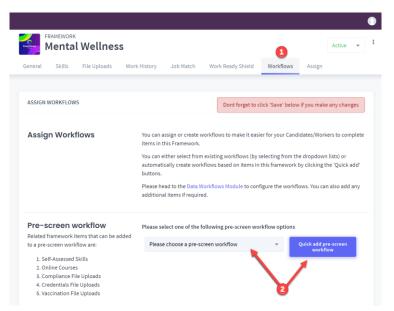
- 1. Click the Work Read Shield tab
- 2. Select the items you require for the candidate to be ready for work
- 3. Click Save to save changes

Mental Wellness		1			Active 👻
General Skills File Uploads Work	History Job Match	Work Ready Shield	Workflows	Assign	
ASSIGN WORK READY SHIELD ITEMS		Dont forget to	o click 'Save' belo	w if you mak	e any changes
Work Ready Shield Add items to your Work Ready Shield to	Skills Evidence File U	Iploads:			
display the core capabilities and credentials that are required for the candidate to be Work Ready. The shield will be displayed in the pipeline for each candidate.	<ul> <li>Empathy</li> <li>Self-Assessed Skills:</li> <li>Empathy</li> </ul>				

#### 4.6.8 Workflows

You can assign or create workflows to make it easier for your Candidates/Workers to complete items in this Framework. You can either select from existing workflows (by selecting from the dropdown lists) or automatically create workflows based on items in this framework by clicking the 'Quick add' buttons.

- 1. Click the Workflows tab
- 2. Select a pre-existing pre-screen workflow from the job down box or click Quick add pre screen workflow



3. Select a pre-existing onboarding workflow from the job down box or click Quick add onboarding workflow

4. Click Save to save changes

Mental Wellness						Active 👻
eneral Skills File Uploads Wor	k History	Job Match	Work Ready Shield	Workflows	Assign	
ASSIGN WORKFLOWS			Dont forget to	click 'Save' below	if you make	any changes
Assign Workflows	items in You can	this Framework. either select fron	vorkflows to make it eas n existing workflows (by kflows based on items ir	selecting from the	e dropdowr	lists) or
	Please h	ead to the Data V al items if require	Vorkflows Module to con ed.	figure the workflo	ows. You ca	n also add any
Pre-screen workflow Related framework items that can be added to a pre-screen workflow are:		elect one of the i	following pre-screen wo	orkflow options		
to a pre-screen worknow are: 1. Self-Assessed Skills 2. Online Courses 3. Compliance File Uploads 4. Credentials File Uploads 5. Vaccination File Uploads	Mellu	n weiniess rie-3				
Onboarding workflow Related framework items that can be added	Please se	elect one of the t	following onboarding w	orkflow options		
to an onboarding workflow are: 1. Self-Assessed Skills 2. Online Courses 3. Compliance File Uploads 4. Credentials File Uploads 5. Vaccination File Uploads 6. Skills Evidence File Uploads 7. Training Plans	Pleas	e choose a onbo	arding workflow		Quick : onboarding	

### 4.6.9 Assign Framework

- 1. Click the Assign tab
- 2. The selected group(s) will be required to complete all the skills, compliance and credentials selected.
- 3. Click Save to save changes

General       Skills       File Uploads       Work History       Job Match       Work Ready Shield       Workflows       Assign         ASSIGN       Dont forget to click 'Save' below if you make any changes         Assign to Groups       The selected groups will be required to complete all the Skills, Compliance and Credentials selected.       Image: Complex click 'Save' below if you make any changes         Image: Complex click is selected.         Image: Complex click is selected.       Image: Complex click is selected.       Image: Complex click is selected.       Image: Complex click is selected.         Image: Complex click is selected.       Image: Complex click is selected.       Image: Complex click is selected.       Image: Complex click is selected.         Image: Complex click is selected.       Image: Complex click is selected.       Image: Complex click is selected.       Image: Complex click is selected.         Image: Complex click is selected.       Image: Complex click is selected.       Image: Complex click is selected.       Image: Complex click is selected.         Image: Complex click is selected.       Image: Complex click is selected.       Image: Complex click is selected.       Image: Complex click is selected.         Image: Complex click is selected.       Image: Complex click is selected.       Image: Complex click is selected. <t< th=""><th>FRAMEWORK</th><th></th><th></th><th></th><th>1</th><th>Active 👻</th></t<>	FRAMEWORK				1	Active 👻
Assign to Groups The selected groups will be required to complete all the Skills, Compliance and Credentials selected.	General Skills File Uploads	Work History Job Match	Work Ready Shield	Workflows	Assign	
Assign to Groups The selected groups will be required to complete all the Skills, Compliance and Credentials selected.						
Assign to Groups The selected groups will be required to complete all the Skills, Compliance and Credentials selected. U To search, start typing a group name U Human Resources C People Skills	ASSIGN		Dont forget t	o click 'Save' bel	ow if you ma	ake any changes
People Skills			Controlyce		on in you me	and any changes
<b>V</b>	The selected groups will be required to complete all the Skills, Compliance and	<b>Q</b> To search, star				
	The selected groups will be required to complete all the Skills, Compliance and	Human Reso	t typing a group name			
	The selected groups will be required to complete all the Skills, Compliance and	Human Reso     People Skills	t typing a group name			
	The selected groups will be required to complete all the Skills, Compliance and	Human Reso     People Skills	t typing a group name			

# 4.7 File Uploads

The File Uploads module allows you to keep your organisation compliant. It allows your learners to upload certificates and other important documentation.

This module is part of the building blocks that helps bring together the workforce wallet, particularly the Skills Evidence section.

Best practice in building your foundation, is to ensure the Skills module is populated with relevant skills. It's important for you to have a full list of skills populated prior to adding Skills Evidence within File Uploads, as the Skills module allows candidates to provide evidence toward a certain skill set. For example, learners may be required to upload evidence, showing that they can perform a certain task.

# 4.7.1 File Types

Throughout the File Uploads module there are five file types. These include:

- General
- Compliance
- Credentials
- Skills Evidence
- Vaccinations

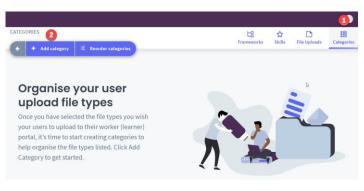
All these file types help candidates build their professional workforce wallet, ensuring best suitability for employment.

USER UPLOADS			멶	☆		800
+ Add general file	+ Add cate	gory	Frameworks	Skills	File Uploads	Categori
O Search Files	Showing resu File type: Genera Clear all filters	al ×				
File Types	Clear all filters	S				
General						
O Compliance	Showing 3 of: General					
Compliance Credentials	Showing 3 of 3					
			Category			Status
Credentials		l Files	<b>Category</b> Employee Relations			Status Active
<ul> <li>Credentials</li> <li>Skills Evidence</li> </ul>	General	l Files _{Name}			-	

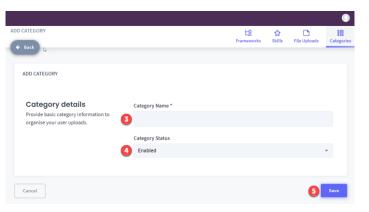
### 4.7.2 Categories

Once you have selected the file types you wish your users to upload to their worker (learner) portal, it's time to start creating categories to help organise the file types listed.

- 1. Click on the Categories tab
- 2. Click Add category



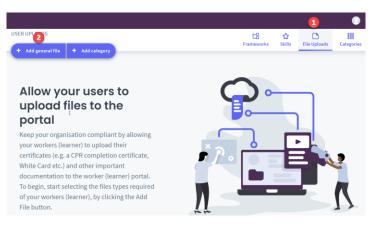
- 3. Add a category title
- 4. Set the status. **Active**: Category is live on the platform and users can upload their certificates. **Disabled**: Category cannot be seen on the platform.
- 5. Click Save to Save changes



### 4.7.3 Adding a File

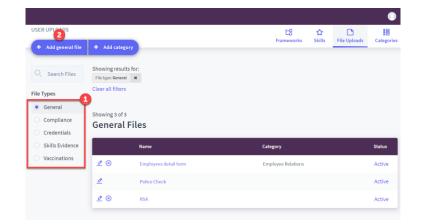
When adding a file for the first time you will only have the option to add a general.

- 1. Click on the File Uploads tab
- 2. Click Add General File



When adding subsequent files (general, compliance credential, skills evidence or vaccination) your screen will look slightly different.

- 1. Select the File Type you need
- 2. Click Add file

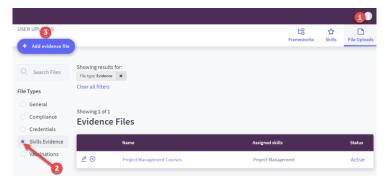


- 3. Enter the File Name
- 4. Select the category
- 5. Set the file status. **Active**: File is live on the platform and users can upload their certificates. **Disabled**: File cannot be seen in the users portal.
- 6. Add a summary
- 7. Toggle ON/OFF if a expiry date is required
- 8. Toggle YES/NO if the manager should advise that they have viewed the original document
- 9. Assign to the relevant group(s)
- 10. Click Save to save changes

FILE			Frameworks	☆ Skills	File Uploads	Cate
васк						
ADD FILE - GENERAL						
File details Create a new file type for your users to	File Name *					
upload. Enter the file name and the status.	3					
You can also provide a summary of the file and why the user needs to upload a copy.	Category		File Status*			
	Please Select	٣	Enabled			*
	Summary					
	3					
	0 / 300					4
File Settings Indicate whether the file requires an expiry	Expiry Date Required				Q	NO
date as mandatory. You can also allow your managers to advise that the original document has been viewed, if required.	Manager should advise that t	hey have view	ved the original	documen	t 🖸	NO
Assign to Groups						
	<b>Q</b> To search, start typing a	a group name				
	+ 🔄 Human Resources					
	Information Technolo	ogy				1
	People Skills					1
			$\sim$			_

# 4.7.4 Adding a Skills Evidence File Upload

- 1. Click on the File Uploads tab
- 2. Select Skills Evidence
- 3. Click Add evidence file



 Enter the File Name PowerHouse Hub ™

- 5. Set the file status. **Active**: File is live on the platform and users can upload their certificates. **Disabled**: File cannot be seen in the users portal.
- 6. Add a summary as to why the learner needs this skill
- 7. Toggle ON/OFF if an expiry date is required
- 8. Toggle YES/NO if the manager should advise that they have viewed the original document
- 9. Assign to the relevant group(s)
- 10. Tag this evidence to a particular skill(s)
- 11. Click Save to save changes

FILE		Frameworks	<b>☆</b> Skills	<b>File Uploa</b>
Back				
ADD FILE - EVIDENCE				
File details Create a new file type for your users to	File Name *			
upload. Enter the file name and the status.	File Status*			
and why the user needs to upload a copy. Evidence Files require a Manager to review	Enabled v			
and confirm the file. Eg: Learners may be required to upload evidence showing that they can perform a specific task.	Summary			
Evidence Files must be assigned to a Skill so 6 when an Evidence File has been approved by their Manager, the Learner will be assigned				li.
the skill. You can add and edit skills in the Skills Module.	0 / 300			
File Settings Indicate whether the file requires an expiry date as mandatory.	Expiry Date Required		С	NO
You can also allow your managers to advise that the original document has been viewed, if required.	Manager should advise that they have viewed the original d	ocument	C	NO
Assign to Groups				
	<b>Q</b> To search, start typing a group name			
	9 Human Resources 9 Recruit Job Posts			
	- 🗆 test			
Tag this evidence file to a skill	Click to select one of more skills or just start typing to search	n		
An evidence based skill can be acquired when uploading a file that gets approved by their Manager that]has that skill assigned.				
You can add and edit the skills by visiting the skills area in the Framework module.				
Cancel			0	Save

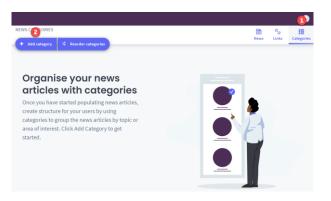
# 5. Communication

# 5.1 News Manager

Broadcast company updates and announcements to your users through the News Editor. You can also choose to email updates to your staff with the click of a button. Simply write your news update, consider adding relevant links or images, then assign it to user groups.

### 5.1.1 Adding a News Category

- 1. Click on the Categories tab
- 2. Click Add category

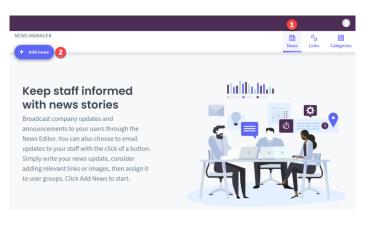


- 3. Add a category title
- 4. Add a description
- 5. Click Save to save changes

NEWS	P	Ś	
4 Back	News	Links	88 Categories
CATEGORY DETAILS			
News Category Details Category Title *			
Add a category for your news and links by adding the name and a short description (if required).			
Category Description			
0			
			h
			_
Cancel		3	Save

#### 5.1.2 Add News

- 1. Click on the News tab
- 2. Click Add news



- 3. Add a title
- 4. Set the status. Published: news article is live and can be viewed. Draft: Keeps new hidden from learner
- 5. Add a publish and removal date. Learners won't be able to view the news article until the selected publish date and won't be able to view after the removal date.
- 6. Toggle YES/NO to email news to users. This is useful for important news updates
- 7. Click choose file to upload a thumbnail image

Back				News	S Links Cate
ADD NEWS			Settings	Description	Assign to Groups
General Settings	Title *				
Create a news article by adding the news title, a summary, the author, the status and dates.	3				
uates.	Author *		Status *		
	Matt Ireland		Published		~
	Published Date	Removal Date			
	06/01/2022	31/01/2023			
	Email News to Users?				
Display Settings	Thumbnail				
		nmended Size: 100×			
		7			
		U			

- 8. Click the Description link
- 9. Add a summary
- 10. Add content using CK Editor options to make the article engaging

Back	News Links C
ADD NEWS	8 Settings Description Assign to Grou
News Content	Summary
Write your news story in the 'Content' section.	0
	0 / 300
	Content* ← → X ℃ @   I _x   B I U   x _x x* E ≥ ± =
	10 ≔ ≕   ⊕ ∉ ≯>   ∞ ∞ ♥   ■ ■ ● ⊞ ≣ Ω Styles -   Size -   <u>▲</u> - ⊠ -   ½   ⊡ ⊖ - ⊟ -   ॐ - ⊡ Source
	Insert news content here

- 11. Click the Assign to Groups link
- 12. Assign news article to the relevant group(s)
  - PowerHouse Hub ™

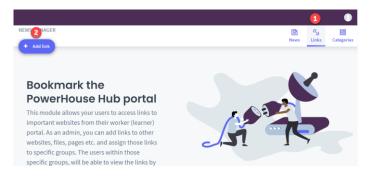
#### 13. Click Save to save changes

					0
ADD NEWS				S Links	
← Back			News	LINKS	Categories
_					
ADD NEWS		Settings	Description	Assign to	Groups
Assign to Groups Assign this news article to groups.	Assign to Groups				
	<b>Q</b> To search, start typing a group name				
	Human Resources				
	12 Recruit Job Posts				
	- C test				-
Cancel				13	Save

#### 5.1.3 Adding Links

This module allows your users to access links to important websites from their worker (learner) portal. As an admin, you can add links to other websites, files, pages etc. and assign those links to specific groups. The users within those specific groups, will be able to view the links by accessing the 'links' tab on their worker (learner) portal.

- 1. Click on the Links tab
- 2. Click Add link



- 3. Add a link title
- 4. Add link URL. Its always best practice to use the link that your organisation's website uses
- 5. Set the status. Published: Link is visible to learners. Draft: learners are unable to see the link
- 6. Add a publish and removal date. Learners won't be able to view the link until the selected publish date and won't be able to view after the removal date
- 7. Assign the link to the relevant group(s)
- 8. Click Save to save changes

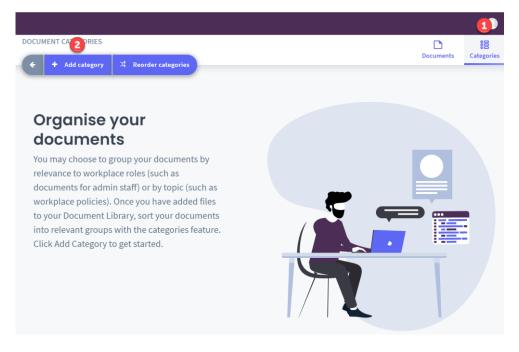
								0
EDI	TING LINK					B	\$	000
C	Back					News	Links	Categories
	_							
	LINK DETAILS							
	<b>Basic Link Information</b>	Link Title *						
	Provide the full URL (including the "http://") for the link you wish to include.	Contact Us						
		Link URL *						
	4	https://www.powerh	ouseworl	kforce.com/contact-us/				
	General Settings	Author *		Status *				
	Provide the general settings of the link, including the author and status.	Matt Ireland		Published	- 5			
	including the buttlot and status.							
	Data Banao		_					
	Add the published and removal dates.	Published Date 07/01/2022	Remova 07/01/					
	•	01/01/2022	01/01/	2025				
	Assign Link	Assign to Groups						
	Assign this link to groups.							
		<b>Q</b> To search, start	typing a	group name				
		🕨 🗌 Human Resor	urces					
		💈 💿 Recruit Job P	osts					
		- test						- 1
				Ť				
	Cancel						8	Save
							_	

# 5.2 Document Library

Store and distribute your key files, policies and documents to your users with the Document Library. Simply upload your files, add a description and assign the files to a category and your user groups.

#### 5.2.1 Adding a Category

- 1. Click on the Categories tab
- 2. Click Add category

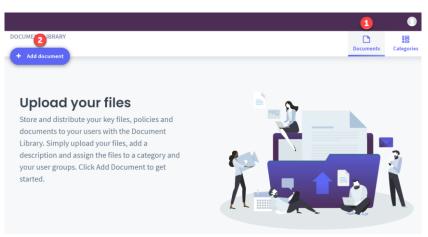


- 3. Add a category title
- 4. Add a description
- 5. Click Save to save changes

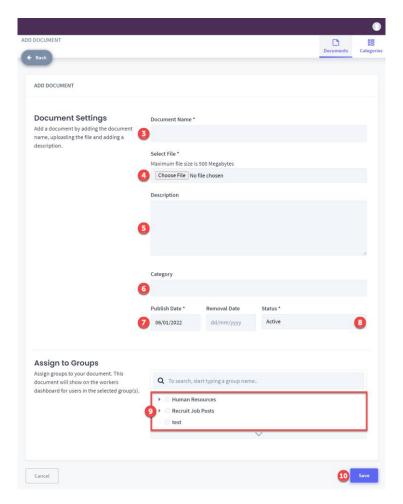
ADD CATEGORY		Documents	2000 Categories
← Back		botantina	categories
ADD CATEGORY			
Document Category Details Add categories to your document. Press and hold the 'Control' key to select multiple	Category Name*		
hold the 'Control' key to select multiple categories.			
	Category Description		
4			li.
	0 / 300		
			_
Cancel		5	Save

#### 5.2.2 Adding a Document

- 1. Click on the Documents tab
- 2. Click Add document



- 3. Add a document name
- 4. Click choose file and upload the relevant file from your hard drive
- 5. Add a description
- 6. Click in the box to add to add a category
- 7. Add a publish and removal date. This is ideal for when contracts are running out. To avoid document overlap set the publish date to when the old contract has expired.
- 8. Set the file status. **Active**: Document is live and can be downloaded from the platform. **Disabled**: Document is hidden from learner.
- 9. Assign the link to the relevant group(s)
- 10. Click Save to save changes

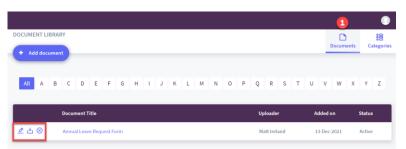


### 5.2.3 Document Library Actions

1. Click on the Documents tab

Documents action buttons allow you to:

- Edit the document
- Download the document
- Delete the document



# 5.3 Workforce insights

This is where you can choose from pre-made surveys or create your own surveys to get insight from your workforce. Surveys can be sent as a one off or automatically sent after a selected number of days.

### 5.3.1 Adding a survey

Please note there are 8 pre-created surveys that you can use and edit, which are highlighted in the red box below. These will be cover in more depth in section 5.3.4.

1. Click Add Survey

	Title	Result	Participation C	ategory Status
	Employee Satisfaction		No Users Assigned	Publishee
۹.	Employee Exit Survey		No Users Assigned	Publishe
×.	Employee Net Promoter Score Survey (eNPS)		No Users Assigned	Publishee
4	Customer Net Promoter Score		No Users Assigned	Publishee
۹.	Sentiment Check (Mood)		No Users Assigned	Publishee
×.	Initiative Check (Employee Reactions)		No Users Assigned	Publishee
۹.	Risk Assessment: Workplace Hazards		No Users Assigned	Published

- 2. Add a survey title
- 3. Set the survey status: Published: Survey is live and is ready to be completed. Disabled: Learners won't be able to see the survey on the platform.
- 4. Toggle ON to repeat the survey, select repeat frequency and start on date
- 5. Assign the survey to the relevant group(s)
- 6. Select where you want the survey to be seen on the learner's portal
- 7. Toggle ON to show group results after completion
- 8. Click Save to save changes

		i.
SURVEY DETAILS		
Survey information	Survey Title *	
Please provide basis supury information	2	
	Survey Status *	
	3 Published	*
	Repeat Survey* Repeat Frequency   Please Select   Start On	
	Please Select 07/01/202 1 Day Assign To Groups * 3 Days	22
	Q To search, start typing a 30 Days	
	▶	
	Recruit Job Posts test	
	~	
	Categories No categories that have been created, please create a new category first.	
	6 Show Survey *	
	Surveys Page Dashboard	
	On Login	
	Show Group Results After Completion 2 0	

9. Click on the title of the survey you just created



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- 10. Click to edit title
- 11. Toggle On and click to edit intro to add introduction text
- 12. Click to add question. There are 5 question types:
  - Mood question. Answers include Bad, Okay and Good
  - Thumbs question. Answers include No, Somewhat and Yes
  - Star question. Answers include No, Somewhat and Yes
  - Time question. Answers include Never, Sometimes and Often
  - Quality question. Answers include Low, Medium and High

EDIT SURVEY QUESTIONS: ONBOARDING SURVEY	Questions	C Report	<b>ب</b> Settings
Onboarding Survey 🖉 🔨			
INTRODUCTION TEXT	<b>e</b>	OFF	Ø
+ Add question 12			

- 13. Click to edit question
- 14. Click to type your question
- 15. Type your follow up question for the three answers. This will be seen by the learner after they have answered the question
- 16. Click Save and then add as many questions as needed to complete the survey

F SURVEY QUESTIC Exit survey	ONS: ONBOARDING SURVEY	Questions Report Set
nboarding S	urvey 🖄	
INTRODUCTION	техт	00F) 💆
MOOD QUESTIO	Ν	<b>13</b> ℤ⊗
Type your quest		
B I 1 = :	<b>=</b>   <b>68 e</b> ² ₂	
Please enter	your question 3	
		4
Please enter	Your question	4
		4
Answer	Follow Up Question	
Answer Bad	Follow Up Question Type a follow up question	
Answer Bad Okay	Follow Up Question Type a follow up question 15 Type a follow up question 15	۲ ۲ ۲ ۲ ۲ ۲ ۲ ۲ ۲

# 5.3.2 Settings

- 1. Click the Settings tab
- 2. This is where you can make changes to the survey information

T SURVEY SETTINGS Exit survey		Questions	Report	Set
SURVEY DETAILS				
Survey information	Survey Title *			_
Please provide basic survey information	Onboarding Survey			
	Survey Status *			
	Published			-
	Main Image			
	Choose File No file chosen			
	Repeat Survey *			
	000			
	Assign To Groups *			
	<b>Q</b> To search, start typing a group name			
2	Community 1 - Powerhouse Hub 2 - Sub Pool 3			
	Human Resources			
	Recruit Job Posts			
	Recruitment Teacher			
	est test			
	~			
	Show Survey *			
	Surveys Page			
	Dashboard			
	On Login			
	Show Group Results After Completion			

### 5.3.3 Report

- 1. Click on the Report tab
- 2. Review the results of your chosen survey

Assigned Human Resources, Recruitment	Overall Result					
Human Resources, Recruitment			Participation			
	17%	83%	40%			
RESULTS OVER TIME		KEYWOR	D CLOUD			
	1 32/2021 04/26		songere replaced duest? en gene i gene i matage ny bite	bo na to sh	crazy chata wate My	
USER LEADERBOARD		GROUP	EADERBOARD			
Rank User Re 1 Joe Thomas 1 Eliza Holloway	sutts	1	Group Human Resources Recruitment	Results		
QUALITY ANSWER						
Question How would you rate your happiness at wor	k?					
Answers						
Low				/otes (0%)		
<ul> <li>Medium</li> <li>High</li> </ul>				/otes (0%) /otes (100%)		

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### 5.3.4 Pre-made Surveys

- 1. There are 8 pre-made survey's that you can edit
- 2. Click on the survey title to edit

	Title	Result	Participation Categ	ory Status
×.	Employee Satisfaction		No Users Assigned	Publishe
4	Employee Exit Survey		No Users Assigned	Publishe
٩.	Employee Net Promoter Score Survey (eNPS)		No Users Assigned	Publishe
4	Customer Net Promoter Score		No Users Assigned	Publishe
۶.	Sentiment Check (Mood)		No Users Assigned	Publishe
٩.	Initiative Check (Employee Reactions)		No Users Assigned	Publishe
e.	Risk Assessment: Workplace Hazards		No Users Assigned	Publishe

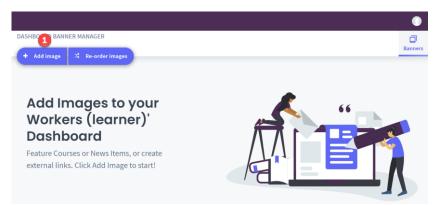
- 3. Click to edit survey title and click save
- 4. Toggle On and click to edit intro to add introduction text
- 5. Click to add another question
- 6. Click to view survey reports
- 7. Click to edit survey settings

C PowerHouse				6	7
Hub	EDIT SURVEY QUESTION	IS: EMPLOYEE SATISFACTION	C Questions	Report	حر Settings
ADMIN DASHBOARD			Quesdons	Report	secongs
SETTINGS	Employee Satis	faction 2 3			
REPORTS	,				
APP STORE	INTRODUCTION T	XT		_	2
DATA WORKFLOWS ~			- <b>Y</b>	OIL	<u>~</u>
UPSKILLING ~			_		
COMMUNICATION	QUALITY QUESTIO	N			
News Manager					
Document Library	How would you rat	e your happiness at work?			
Workforce Insights	Answers	Follow Un Occasion			
User Dashboard Banner		Follow Up Question			- 1
Dashboard Surveys	Low	Oh, just 'low'? Why is that?			
ADMINISTRATION ~	😑 Medium	Okay, is there anything you'd like to see improved?			
PLATFORM MANAGEMENT ~	High	Great! Is there anything else you'd like to add?			
	QUALITY QUESTIO	N			
	Constally how ma	nageable is your day-to-day workload?			
	Generatly, now ma	iageable is your day-to-bay workload:			_
	Answers	Follow Up Question			
	e Low	Oh, just 'low'? Why is that?			
	e Medium	Okay, is there anything you'd like to see improved?			
	🔵 High	Great! Is there anything else you'd like to add?			
	+ Add question	8			

# 5.4 User Dashboard Banner

Dashboard banner module allows you to feature courses or news items, or external links to a learners dashboard banner

1. Click add image



- 2. Add image title
- 3. Click Choose File and upload image form your hard drive. Recommended image size is 1400x420 pixels
- 4. Add an image caption
- 5. Click the drop down box to link the image to an image. Options include a course, a news item, an external link
- 6. Assign the banner image to a group(s)
- 7. Click Save to save changes

BANNER IMAGE		(
Back		Bar
ADD IMAGE		
Dashboard Banner Image	Image Title *	
Add an image and details to show to Workers (learner) on their dashboard. Recommended image size: 1400 x 420 pixels.		
Recommendeu image size. 1400 x 420 pixels.	Image File *	
	Choose File No file chosen Allowed file types: JPG, JPEG, PNG, GIF, SVG	
	Image Caption	
	<b>,</b>	
Add a Link to the Image Add a link to show to Workers (learner) on	Link Image to an item Please Choose	
their dashboard. If you link a course or news item, ensure you assign this image to the same groups.	Please Choose A Course A News Item An External Link	
Assign to Groups		
Assign this banner image to a group, only images assigned to users groups will display on the Worker (Learner) dashboard.	<b>Q</b> To search, start typing a group name	
Note: If you have chosen a News Item or Course to link, please ensure to assign to the same groups as the chosen item.	Human Resources	

# 5.5 Dashboard Surveys

Dashboard Surveys can collect valuable data for your organisational needs. Create short polls and surveys that display on each worker (learner) dashboard. Once the worker (Learner) has responded to the poll or survey, the system automatically collects and analyses the responses.

### 5.5.1 Add a Poll (True & False Question)

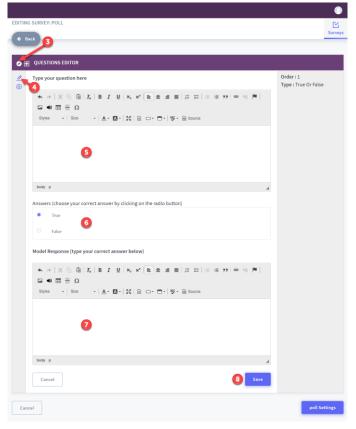
1. Click Add poll



2. Click edit to add questions

HBOARD SURVEYS		
Add poll + Add quiz		Su
DASHBOAF 2 LLS		Add Poll Survey
Survey Details	Туре	
Author: Created on: 06-01-2022	poll	

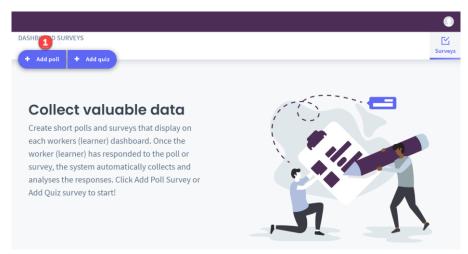
- 3. Click to add true and false question
- 4. Click the edit question icon
- 5. Click in box to type your question
- 6. Choose the correct answer by clicking on the radio button
- 7. Click in box to type the correct answer
- 8. Go back to step 2 to add additional questions. When finished click Save to save changes



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# 5.5.2 Add a Poll (Multiple Choice Question)

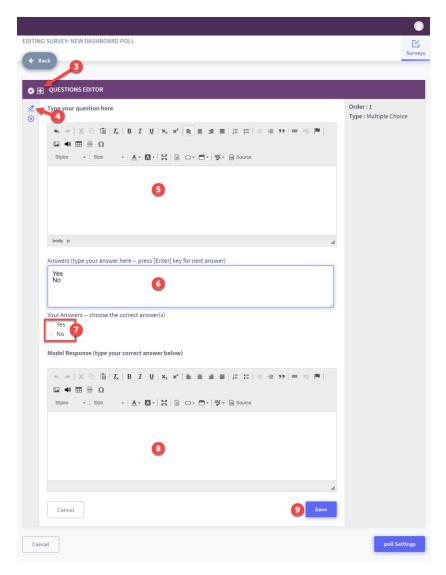
1. Click Add poll



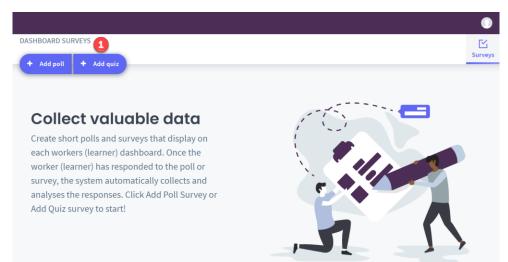
2. Click edit to add questions

Add poll + Add quiz		
Add port - Add quiz		
DASHBOAR 2 LLS		Add Poll Surve
🖉 🔍 🛞 New Dashboard Poll		
Survey Details	Туре	
Author: Created on: 06-01-2022	poll	

- 3. Click to add multiple choice question
- 4. Click the edit question icon
- 5. Click in box to type your question
- 6. Click in box to type your multiple-choice questions. Press [enter] key to type next multiplechoice answer. You can add as many answers as you need
- 7. Select the tick box next to the correct answer
- 8. Click in box to type the correct answer
- 9. Go back to step 2 to add additional questions. When finished click Save to save changes



- 5.5.3 Add a quiz (True & False Question)
  - 1. Click add quiz



2. Click edit to add question

IBOARD SURVEYS Add poll Add quiz		[ Su
DASHBOARD C 2 ZES		Add Quiz Survey
Survey Details	Туре	
Author: Created on: 07-01-2022	quiz	

- 3. Click to add true & false question
- 4. Click edit question
- 5. Click in box to type your question
- 6. Click on the radio box to choose your correct answer
- 7. Click in box to type the correct answer
- 8. Go back to step 3 to add additional questions. When finished click Save to save changes

	• • • • • • • • • • • • • • • • • • •
EDITING SURVEY: NEW DASHBOARD QUIZ	Ľ
e Back 3	Surveys
O E & QUESTIONS EDITOR	
Type your question here Order : 1 3 Type : Tr	ue Or False
Styles -   Size -   A - M -   K   D O - O -   🕸 - D Source	
Please enter your question	
5	
A	
Answers (choose your correct answer by clicking on the radio button)	
True 6 False	
Model Response (type your correct answer below)	
★ →   X ℃ 面 図 B I U   X, X [*]   E Ξ Ξ Ξ   □ □   ◎ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □	
Styles - Size - A - 🖸 - 🔀 a 🕸 - 🕲 Source	
4	
Cancel Save	
Cancel	quiz Settings

### 5.5.4 Add a Quiz (Add Multiple Choice Question)

1. Click add quiz



2. Click edit to add question



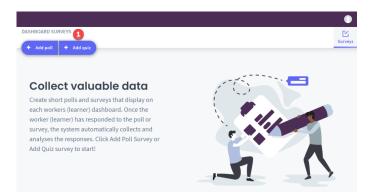
- 3. Click to add multiple choice question
- 4. Click edit question
- 5. Click in box to type your question
- 6. Click in box to type your answer. Press [enter] key to type next multiple choice answer
- 7. Select the correct answer
- 8. Click in box to type the correct answer
- 9. Go back to step 3 to add additional questions. When finished click Save to save changes

E QUESTIONS EDITOR	
Yope your question here	Order : 1 Type : Multiple Cho
Please enter doyour question	
body p	4
Answers (type your answer here press [Enter] key for next answer) bilue green red	
Your Anywers - choose the correct answer(s) blue green red	
Model Response (type your correct answer below)	
Styles -  Stell +  A + Ω +  X   B − + Ξ +  V + B Source	
0	

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### 5.5.5 Add a Quiz (Short Answer Question)

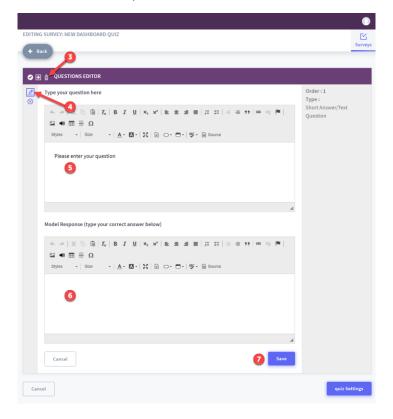
1. Click add quiz



2. Click edit to add question

		s
Add poll + Add quiz		_
DASHBOARD C 2 YES		Add Quiz Surve
🖉 🔍 New Dashboard Quiz		
🖉 🛞 New Dashboard Quiz Survey Details	Туре	

- 3. Click to add short answer question
- 4. Click edit question
- 5. Click in box to type your question
- 6. Click in box to type the correct answer
- 7. Go back to step 3 to add additional questions. When finished click Save to save changes



### 5.5.6 Poll and Quiz Settings

- 1. Click the settings icon
- 2. Click to edit Poll/Quiz title
- 3. Option to present questions in the order they were created or to randomise questions
- 4. Set Status. Published will set the Poll/Quiz live. Draft will stop to Poll/Quiz from being seen by learner.
- 5. Assign Poll/Quiz to groups
- 6. Click Save to save changes

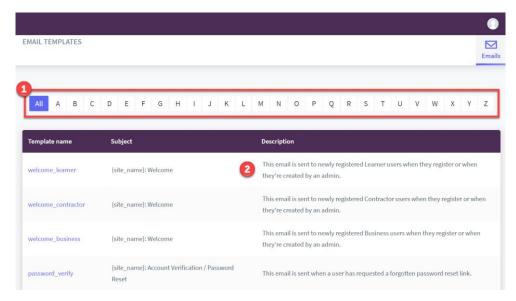
		•
DASHBOARD SURVEYS		Surveys
+ Add poll + Add quiz		Surveys
DASHBOARD POLLS		Add Poll Survey
🖉 🔧 🛞 Poll		
	POLL SETTINGS	
	To edit this Poll, please update the details below.	
2	Poll Title* Poll	
	Question Order	
	Present all questions in order as created	
4	Published -	
	Assign to Groups	
	Q To search, start typing a group name	
	Human Resources     People Skills     Recruit Job Posts	
	~	
	Cancel Save	
Survey Details	Туре	
Author: Created on: 06-01-2022	poll	

# 6. Administration

# 6.1 Email Templates

Email templates are pre-created emails that the platform automatically sends once an action has been triggered. For example, send a welcome email to a new user. All templates can be edited if you need to change the wording.

- 1. Click on a letter to only display the templates names starting with that letter
- 2. The description field describes what the template is used for



### 6.1.1 Editing an email template

1. Click on the template name

		•
EMAIL TEMPLATES		Emails
All A B C	D E F G H I J K L	M N O P Q R S T U V W X Y Z
Template name	Subject	Description
welcome_learner	{site_name}: Welcome	This email is sent to newly registered Learner users when they register or when they're created by an admin.
welcome_contractor	{site_name}: Welcome	This email is sent to newly registered Contractor users when they register or when they're created by an admin.
welcome_business	{site_name}: Welcome	This email is sent to newly registered Business users when they register or when they're created by an admin.
password_verify	{site_name}: Account Verification / Password Reset	This email is sent when a user has requested a forgotten password reset link.

- 2. Only administrators can view the email description. It is advised that this text isn't changed
- 3. Only edit the email subject text. Don't edit the code, which is anything in brackets or directly after the brackets {} for example {site_name}:
- 4. Only edit the email content text. **Don't edit the code, which is anything in brackets or directly after brackets {} for example** {password}
- 5. Click Save to save changes

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TING EMAIL TEMPLATE		E
Back		
EDIT EMAIL TEMPLATE		
Email template Here you can edit the details of the email sent to your users.	Email Name welcome_learner Email Description This email is sent to newly registered Learner users when they register or when they're created by an admin.	
	Email Subject * (site_name): Welcome	h
4	Email Content * Welcome to (site_name). You have successfully registered and can now access the (site_name) portal.	
	Your login details are: Username : (username) Password : (password) To login please follow this link: https://(domain)/	
	Regards, (site_name)	~
	259 / 2000 Email Variables (site_name), (firstname), (lastname), (username), (password), (domain)	
		Save

# 6.2 Certificate Manager

The Certificate Manager allows you to create your own custom certificates. These can then be assigned to courses, events, and webinars.

1. Click add certificate

		0
CERTIFICATE MANAGER	O,	f
+ Add certificate	Search	Certificates
Title Added	ı	Modified
· 호 호 Ourse Completition 08/12,	2021	08/12/2021

- 2. Add a title
- 3. Click choose file to upload a background image from your hard drive. The background image must be a valid image file (.jpg, .png) and should be the same width and height as defined in the red box below
- 4. Edit the certificate content (intermediate to advance options)
  - Text edit text, for example, This is to certify that
  - Font change the font name between the brackets |Arial|
  - Size change the font number between the brackets |16|
  - Colour change the Hex code between brackets |#a1a1a1|
- 5. Click Save to save changes

ADD CERTIFICATES				
Certificate settings	Title *			
Add a certificate by completing the title, background image and content.	2			
	-			
	Background Image *			
	Choose File No file			
	The background imag and height as defined		e (.jpg, .png) and should be the same widt	h
	Content*			
		BI80ICertificate of Co	mpletion	
	Center/Anail 16/#ai Center/Anail30/#ai Center/Anail216/#ai Center/Anail216/#ai Center/Anail16/#ai Center/Anail26/#ai Center/Anail20/#oc	a1a1  110  This is to 000  B118  Gearner_t a1a1  130 of 0000  B138 Company a1a1  170  has succ 0000  B178  Course_t a1a1  1190  on 0000  B198  Complete	mpletion certify that name) Name sestuily completed the <u>tile</u> ) <u>ed_date</u> )	
Dimensions	Width*		Height*	_
All values are in millimetres (mm).	210		297	
	(default: 210mm)		(default: 297mm)	
	Left Margin *	Top Margin *	Right Margin *	_
Configuration Instructions:	20 Default: 20mm	5 Default: 5mm	20 Default: 20mm	
Line Structure: ALIGNMENT FONT SIZ	20 Default: 20mm !!E COLOR STYLE POSITIONY TE	5 Default: 5mm	20	
Line Structure: ALIGNMENT FONT SI2 Possible Fonts: Arial, Courier, Helveti	20 Default: 20mm KE[COLOR]STYLE]POSITIONY[TE ca, Symbol, Times	5 Default: 5mm	20	
Line Structure: ALIGNMENTJFONTJSIZ Possible Fonts: Arial, Courier, Helveti Variables: The range of variables available are deter CPD CERTIFICATES (SIZE: 210W X 297H):	20 Default: 20mm EE[COLOR]STYLE]POSITION/ITE ca, Symbol, Times mined by where the certificate	5 Default: 5mm xt is assigned. WEBINAR CERTIFICATI	20	
Line Structure: ALIGNMENT[FONT[S12 Possible Fonts: Arial, Courier, Helveti Variables: The range of variables available are deter CPD CERTIFICATES (SIZE: 210W X 297H): (learner, name)	20 Default: 20mm EE[COLOR]STYLE]POSITION/ITE ca, Symbol, Times mined by where the certificate	5 Default: 5mm XT Is assigned. WEBINAR CERTIFICATI (learner_name)	20 Default: 20mm	
Line Structure: ALIGNMENT[FONT[SIZ Possible Fonts: Arial, Courier, Helveti Variables: The range of variables available are deter CPD CERTIFICATES (SIZE: 210W X 297H): [learner_name] [completed_date] [(pd_p.rofile]	20 Default: 20mm EE[COLOR]STYLE]POSITION/ITE ca, Symbol, Times mined by where the certificate	s Default: 5mm xt wEBINAR CERTIFICATI (learner_name) (webinar_title) (completed_atae)	20 Default: 20mm	
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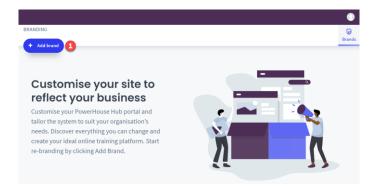
6. Click the download button to view your certificate

		0
CERTIFICATE MANAGER  + Add certificate	Q. Search	<b>E</b> Certificates
Title	Added	Modified
ප් 🖉 🛞 Course Completition	08/12/2021	08/12/2021

# 6.3 Group Branding

The branding module allows you to assign a different logo and colour scheme that can be assigned to a specific group

1. Click add brand



- 2. Add a brand name
- 3. Click choose file to upload a brand logo from your hard drive
- 4. Set Status. Active is live. Disabled means the brand wont be seen by the users
- 5. Select colour scheme by using the pre-set colour palette or by click in the primary / accent colour box.
- 6. Assign the logo and colour scheme to a group(s)
- 7. Click Save to save changes

ADD BRAND		
Brand details	Brand Name *	
Add your organisation's brand, including the name and logo.	2	
	Brand Logo *	
•	3 Choose File No file chosen	
	Allowed file types: JPG, JPEG, PNG, GIF, SVG Status	
•	4 Active	Ŧ
Colours		
Customise the colours on the portal to match your brand.	Use pre-set colour palette Slate Purple Orange Green Red	
	5 Primary Accent	
	CURRENT: #4C2D55 CURRENT: #5E67F3	
	CORRENT: MLZ2033 CORRENT: #32607F3 DEFAULT: #4C2055 DEFAULT: #5667F3	
	Reset colours to default	
	Reset colours	
Assign to Groups Choose the group(s) that you want this		
branding to appear for.	<b>Q</b> To search, start typing a group name	
Note: Any group that already has a brand assigned to it will not display here.	Human Resources     People Skills	
	Recruit Job Posts	
	$\sim$	

8. When logging in as a member of the Human Resources group, you will see that the logo and colour scheme has changed.

8		
Workforce	DASHBOARD	
TRAINING RECORD		
	ALERTS	View all
	There are no alerts	to
	display.	

#### 6.4 Visitor Manager

The Visitor Manager module allows you to create temporary account for users who require sitespecific induction courses.

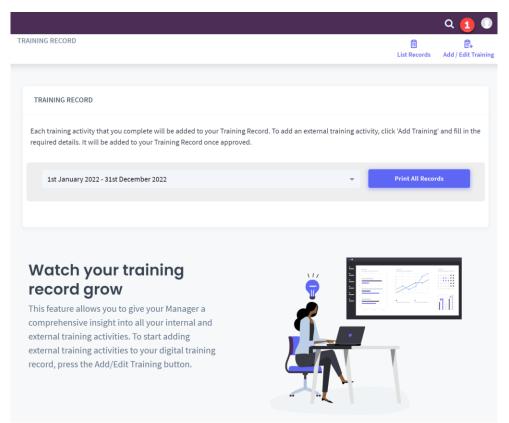
### 6.5 Training Records

This feature allows admins to have a comprehensive insight into all users' external training activities. Once the worker has imported external training records, the admin can view and accept or decline external training records.

#### 6.5.1 Adding an external training course for review

Workers can add external training certificates to their Training Record by:

1. Click add / edit training



- 2. Edit the date when the training was completed
- 3. Enter the training name
- 4. Upload a document relevant to the training. This field is mandatory
- 5. Click add

					Q 🔺 🔘
ADD TRAINING				List Records	🛱 Add / Edit Training
Date	Description	Documentation (Maximum file size: 500 MB)	Status	Edit/De	elete
D <b>2</b>	Activity 3	4 Choose File No file chosen		5 Ad	d
Cancel					

# 6.5.2 Accepting Training Records

- 1. Click Training records
- 2. Click on the hamburger icon
- 3. Click edit / view record

								<b>0</b>
RAINING RE	CORDS						Q Search	00 Training records
Name	Email	Date	Activity	CPD Category	CPD Hours	Documentation	2 Status	Action

- 4. Click link to download documentation for review
- 5. Ability to edit the activity date by clicking in the text box
- 6. Ability to edit the activity name by clicking in the text box
- 7. To approve the training record, click in the drop down box and select approved
- 8. Click Save to save changes

FING TRAINING RECORD		000
Back		Training reco
APPROVE TRAINING RECORD		
User Details	No. No. 1	
Users details. Click the file to download a	User Name: Joe Thomas	
сору.	User Email:	
	joe@nowhere.com	
	Documentation:	
•	4 Manager employee relations certificate.png	
Training Record Details	Activity Date:	
Edit the training record by amending these fields if required.	5 01/12/2021	
	Activity Name:	
•	6 Managing Employee Relations	
	CPD Category:	
	-	
	CPD Hours:	
	0.00	
Approval	Approval Status:	
Update the Approval status to Approved for this record to show in the users Training	Pending	~
Record list.	Pending	
	Approved	

9. When the worker clicks add / edit training they can see that there training record has been approved

DD TRAINING			Lis	t Records	Q 🧿 🕕 Add / Edit Training
Date	Description	Documentation (Maximum file size: 500 MB)	Status	Edit/De	elete
01/12/2021	Managing Employee Relations	Manager employee relations certificate.png	Approved		
10/01/2022	Certificate iv in work health and safety	Certificate iv in work health and safety.png	Pending		Edit Delete
Date	Activity	Choose File No file chosen		Ad	d

# 6.5.3 Delete a Training record

- 1. Click Training Records
- 2. Click the hamburger icon
- 3. Click delete record. The Training Record will now be deleted from the learners portal

RAINING F	ECORDS						Q Search Tr	oDD raining record
Name	Email	Date	Activity	CPD Category	CPD Hours	Documentation	Status (2	Action
Joe Thomas	joe@nowhere.com	01/12/2021	Managing Employee Relations	÷	0.00	Manager employee relations certificate.png	Approved	1
Joe Thomas	joe@nowhere.com	10/01/2022	Certificate iv in work health and safety		0.00	Certificate iv in work he-international safety.png	Edit/View Reco	rd I

### 6.6 User accounts

This feature allows you to create various user access levels. You have the option to create learners/workers, managers, businesses, and administrator accounts.

It's important that you understand the hierarchy order of user types and what access they have on the platform. You can also change the name of the User Accounts to suit your business acronyms.

### Administrator

Administrators have the highest level of access on the Platform. Administrators can grant permissions to other users on the Platform and edit any fields required. As an administrator you can also restrict other users accessibility across all module functions so they can only access what you want them to.

#### Manager

Managers are assigned based on the group structure, which is important when managers are seeking to run reporting on certain content. Based on the group structure Managers are assigned to; they have authorisation to oversee all Learner and Candidate users and are responsible for all management of those users.

### **Employee/Learner**

Learners strictly use the platform to complete set tasks/courses/events/workflows etc. which build into their workforce wallet to compile a detailed overview of their professional profile and development. Learners, just like Managers are assigned to a group structure so reporting and delegation of tasks are distributed correctly under each group.

#### Candidate

A Candidate user is only created automatically when they apply for a job within the Recruitment Service Module and are in the phase of being screened for suitability by Management. Once successful; this Candidate User is transitioned automatically into a Learner User License.

#### **User Creation Tip**

For bulk upload of user types this can be done by ensuring all relative fields are replicated and prefilled in a csv spreadsheet ready for upload. If you are choosing to bulk upload 20 x Users or more, you are permitted to send the spreadsheet to our Support Team for uploading.

### 6.6.1 Add a User Accounts

1. Click Add User

USER ACCOUNTS	.0	<b>Q</b> User Accounts	(+) Admin Permissio		Ez t/Export ▼	88 Forms & Labels ▼	€ Buy More Users	(+) More •
O _{Search} I	Showing 4 of 4 <b>Users</b>				S	ort by Last nar	me A-Z 👻 🔽	f Filter
User type	User account		Login name	Groups	User type	Status	Last login	
All user types     Admin     Manager	Business Bus	iness	business		Business	Active	a day ago	ı
Business Worker	Manager Mar	nager	manager 🔻		Manager	Active	a day ago	:
(Learner) Candidate	Learner Learn	ner	learner 🔻		Worker (Learn	er) Active	a day ago	1
• All statuses	Admin Admin	1	admin 🔻		Admin	Active	a day ago	:
<ul><li>Active</li><li>Disabled</li></ul>	Page: 1 of 1							

- 2. Select User Type (Worker (Learner), Manager, Business or Admin). The below screen shot shows required information when creating an amin account
- 3. Select Status. Active: the user can access the platform. Disabled: The account is not yet live
- 4. Complete General Information (this will change when a different User Type is selected).

DUSER	User Accounts	↔ Admin Permissions	Import/Export 🔻	88 Forms & Labels ▼	Buy More Users	Mor
ADD USER						
ADDOSER						
Account details Select the type of user you want to creat	User		Permission Sche Default			
	•					
		The fields below <i>may</i> c er or not they're linked				st.
General Information	Role		т	itle		
Provide as much detail as you can about user.	t this			Mr		-
			F	irst name *		
	Last r	ame *	A	ddress (Line 1)		
	Adda	ss (Line 2)		uburb / Town		
	Addre	ss (Line 2)	3	uburb / Town		
	City		s	tate / County		
	Post	ode / Zip code	c	ountry *		
				Please select		-
			Р	hone		
	Mobil	e	E	mail address *		

5. You have the option to upload a profile picture

- 6. Create a link between two or more user accounts providing the user the ability to easily switch between accounts from the menu in the top bar
- 7. Create login details for your new user (note that the password must be more than 6-12 characters
- 8. Assign the user to groups. By doing this, you are allowing the user accessibility to all course materials, events, webinars, documents etc. assigned to those groups
- 9. Click create

Profile Picture Add the profile picture for this user.	Lupload picture
Link Accounts	Business
Create a link between two or more user accounts providing the user the ability to	•
easily switch between accounts from the menu in the top bar.	
The second se	Manager 🗸 🗸
	Worker (Learner)
	Ť.
Login Details	Username *
Create login details for your new user (note that the username must be more than three (3) characters long).	username -
	Password *
	Confirm Password *
	I
	Must contain 6-12 characters     Passwords must match
Assign to Groups	Select Group
Assign the user to groups. By doing this, you are allowing the user accessibility to all	Q Hu
course materials, events, webinars, documents etc. assigned to those groups.	- Human Resources
	×

### 6.6.2 Assigning user groups

1. Click on a user from the User Accounts page

+ Add user		User Accounts	€ Admin Permissions	Import/Export 🔻	88 Forms & Labe	els ▼ Buy	(+) More Users	Mo
Q Search	Showing 8 of 8 Users				Sort by	ast name A-i	z 👻 🔽	Filter
All user types	User account	1 Logi	n name	Groups	User type	Status	Last login	
Admin Manager	Holli Bri	an holli	i@yourdomain.com	Human Resources	Admin	Active	Never	1
<ul><li>Business</li><li>Worker</li></ul>	John Do	e john	i.doe	Human Resources	Manager	Active	Never	;
Candidate	Matt Irel	and mat	Lireland	Human Resources	Contractor	Active	Never	1
Status <ul> <li>All statuses</li> </ul>	Matt Irel	and mat	ti@powerhousehub.com		Admin	Active	7 hours ago	1
<ul> <li>Active</li> <li>Disabled</li> </ul>	Business	Business busi	iness		Business	Active	13 days ago	1

PowerHouse Hub ™

- 2. Click Assigned Groups within the Profile Summary.
- 3. Select the relevant groups/subgroups you wish to assign or unassign to the user. By assigning groups to your user account, you are giving the user access to all courses, news, webinars, documentation, and events within that group.
- 4. Click Save to save changes

VIEWING USER: HOLLI BRIAN (#9)	User Accounts Add	⊕ min Permissions	₩ Import/Export ▼	88 Forms & Labels 🔻	€ Buy More Users	() () More
PROFILE SUMMARY						
Holli Brian HE Manager INFORMATION User ID: 9 User type: Adm Userrame: holl Joined: 17/1 \$tatus: Activ Last seem: New	@yourdomain.com 2/21 /e	CONTACT DET				
EDIT DETAILS	NOTES		2 ASSIGNED GROUPS	IM	IPERSONATE USER	
Assigned Groups Assign the user to groups. By doing this, are allowing the user accessibility to all course materials, events, webinars, documents etc. assigned to those group	Q To sea	arch, start typing nan Resources ruit Job Posts	a group name			]
Assigned Cpd Group Each user can only inherit I CPD Group Setting, please select the cpd parent gro for this user.	No cpd group	os avaliable.				
					0	Save

### 6.6.3 Impersonate User

- 1. Click on the hamburger icon next to the user that you want to impersonate
- 2. Click Impersonate user

+ Add user	U	Admin Permissio	ns Import/Export		E Cabels V Buy More Users	( Mo
O _, Search	Showing 8 of 8 Users			Sort by	Last name A-Z 👻	<b>T</b> Filter
User type	User account	Login name	Groups	User type	1 Status Latiogin	
All user types     Admin     Manager	Holli Brian	holli@yourdomain.com	Human Resources	Admin	Edit user	
<ul><li>Business</li><li>Worker</li></ul>	John Doe	john.doe	Human Resources	Manager	2 P Impersonate user	
Candidate	Matt Ireland	matt.ireland	Human Resources	Contractor	Active Never	
All statuses	Matt Ireland	matti@powerhousehub.co	om	Admin	Active 8 hours ago	
<ul><li>Active</li><li>Disabled</li></ul>	Business Busi	ness business		Business	Active 13 days ago	
	Manager Man	ager manager 🔻		Manager	Active 13 days ago	
	Learner Learn	er learner 🔻		Worker	Active 13 days ago	
	Admin Admin	admin 💌		Admin	Active 13 days ago	

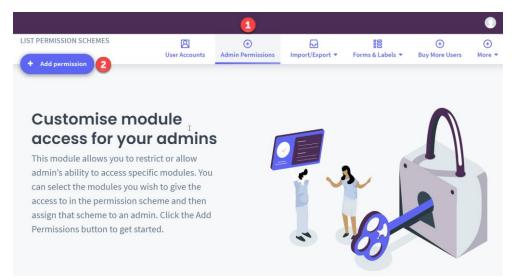
A new window will appear and allow you to navigate the platform and see exactly what that user will see. This can be used to test any settings made to the account or help problem solve if a user is having issues with the platform.

### 6.6.4 Admin Permissions

This module allows you to restrict or allow admin's ability to access specific modules in the left hand navigation. You can select the modules you wish to give the access to in the permission scheme and then assign that scheme to an admin.

Click the Add Permissions button to get started

- 1. Click the Admin Permissions tab
- 2. Click Add permission



- 3. Add permission scheme title
- 4. Select relevant the modules that this setting allows
- 5. Click Save

PERMISSION SCHEME	8	۲			$\odot$	Œ
Back	User Accounts	Admin Permissions	Import/Export -	Forms & Labels 🔻	Buy More Users	More
EDIT PERMISSION SCHEME						
Permission Schemes		sion Scheme Title				
Control what your Admin users can do admin portal. Access to individual mod	Perm	ission 1				
granted to users by these permissions.	Landin	g Page Module				
A permission scheme must grant access the configured landing page module.	sto	lmin Dashboard				
01-0	Allowe	d Modules				
	🖾 App	Store				
	Asse	essments				
	💙 🛛 Asse	essments				
	🖾 Asse	et Manager				
	Brar	nding				
	Cert	ificate Manager				
	Cou	rse Catalogue				
	Cou	rse Editor				
	Dast	nboard Banner				
		nboard Surveys				
		ument Library				
		il Templates				
	Ever					
		nework Manager				
		up Management				
		u Shortcuts				
		s Editor				
		uit Handover				
	Rep					
	Sett	eduled Tasks				
	Sup					
	125.00	ning Plan Manager				
		ning Records				
		Accounts				
		Uploads				
		or Manager				
		Content Editor				
		inar Manager				
		kflow Manager				
		kforce Insights				

The permission scheme you just created can be assigned when adding an admin user type (shown in image below).

Account details	User Type *	Permission Scheme (Edit)	Status *
Select the type of user you want to create	Admin	v Permission 1 v	Active
	Note: The fields be	elow <i>may</i> change depending on the type	of user you are creating, and
		y're linked to a business so it is advised	

### 6.6.5 Import Users

You can import bulk users onto the platform by uploading a CSV compatible file. This is suggested when you are adding 20+ Users or more.

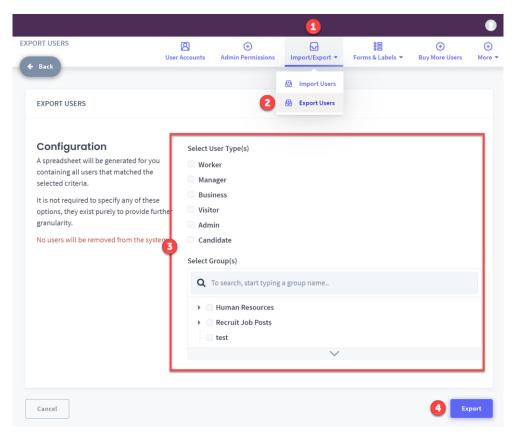
- 1. Click Import/Export dropdown box in the top menu panel
- 2. Click Import Users
- 3. Download CSV Template and fill out the form with all user information
- 4. Upload completed CSV
- 5. If you haven't added a password for each user in the CSV, please select an option from the drop down box
- 6. Click Validate & Import

PORT USERS	8	•		:00	<b></b>	(
🗲 Back	User Accounts	Admin Permissions	Import/Export 🔻	Forms & Labels 🔻	Buy More Users	Мо
		2	🔁 Import Users			
IMPORT USERS			🔁 Export Users			
Please select an LMS compatible CS	SV file to import. You	can obtain the require	d template by clickir	ng the "Download CS\	/ Template" link bel	ow.
Maximum file size: 500 MB						
Choose File No file chosen						
Download CSV Template						
Group Assignments:						
You can opt to assign a user to one			emplate itself, howe	ver first you must obt	ain the required gro	oup
key(s) found next to the group title You can then find the "groups" colu			particular user with	that group key (sepa	rate multiple group	
with a comma). For example: group			particular user with	that Broup Key (separ	are mattiple group.	2
CPD Group Settings:						
Each user will only inherit 1 CPD Gr	oup Setting, please e	nsure vou have assign	ed 1 CPD Group for e	ach user.		
Each user will only inherit 1 CPD Gr	oup Setting, please e	nsure you have assign	ed 1 CPD Group for e	each user.		
Duplicates:						
Duplicates:						
Duplicates: Any duplicate, or already existing a	ccounts will be ignore	ed and you will be noti	fied of these at the e	nd of import.	ey are blank we sho	uld:
Duplicates: Any duplicate, or already existing an Blank Password Handling: You are able to specify a password f	ccounts will be ignore	ed and you will be noti	fied of these at the e	nd of import.	ey are blank we sho	uld:
Duplicates: Any duplicate, or already existing ac Blank Password Handling:	ccounts will be ignore	ed and you will be noti	fied of these at the e	nd of import.	ey are blank we show	uld:
Duplicates: Any duplicate, or already existing an Blank Password Handling: You are able to specify a password f	ccounts will be ignore	ed and you will be noti	fied of these at the e	nd of import.	ey are blank we sho	uld:

### 6.6.6 Export Users

A spreadsheet will be generated for you containing all users that match the selected criteria. It is not required to specify any of these options, they exist purely to provide further granularity.

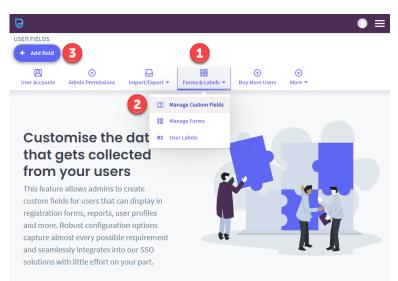
- 1. Click Import/Export
- 2. Click Export Users from the dropdown box
- 3. Select the relevant user type(s) and group(s) that they are associated to
- 4. Click Export



### 6.6.7 Manage Custom Fields

This feature allows admins to create custom fields for users that can display in registration forms, reports, user profiles and more. Robust configuration options capture almost every possible requirement and seamlessly integrates into our SSO solutions with little effort on your part

- 1. Click Forms & Labels
- 2. Click Manage Custom Fields from the dropdown box
- 3. Select Add Field



- 4. Select the type of field you want to create
- 5. Give the field a name
- 6. Add a description
- 7. Toggle Yes if you would like the fields to be included in reports that are created

- 8. Toggle Yes if you would like learners to complete the user fields under Edit Profile where they can complete these manually
- 9. Click Create

G	I									•	
	W USER FIELD										
	Back										
ι	Ser Accounts	Admin Permissions	Import/Export 🔻	Forms &	_	Our State Control Buy More Us	ers	⊕ More ▼			
					_						
	GENERAL INF	ORMATION									
	text. If you're not o <b>Type *</b>	le the type of field you quite ready to publish t								as help	
	Please Sel	lect		-							
	Title *										
E	My Custon	n Field									
	Description If provided, field.	the content below will	l be displayed below t	he field,	typically us	eful for provi	ding he	elpful infor	mation abou	ut the	
6	0/255									h	
	Here you can users profiles	& Permission s specify where you wa s, allow your users to n ustom fields can be syr hen the user signs in w	nt the field to appear, nodify it and more. nced with the SAML in							illy	
Z	Show in re	eports	0	NO	Show in u	iser profiles			$\subset$		8
	Cancel								9	Create	

### 6.6.8 Manage Forms

After User Fields are created, you can now build a custom form for your users to fill out. There are 3 Active forms to create for learners, contractors, and business users.

- 1. Click Forms & Labels
- 2. Click Manage Forms
- 3. Click Add form

			1		•
USER FORMS	↔ Admin Permissions	☐ Import/Export ▼	Forms & Labels	Buy More Users	) More
+ Add form		IM	lanage Custom Fields		
ACTIVE WORKER (LEARNER) FORM	ACTIVE CON		lanage Forms	USINESS FORM	
The currently active form showing for this type of user is: <b>Default Form O</b>	The currently showing for <b>Default Form</b>	y active form this type of user is:	: showin	rently active form g for this type of user : Form <b>0</b>	is:
USER FORMS					
Form title Active	User type	e F	Public	Fields	
	ou have no created ar	ny custom forms ye	et		

- 4. Add a page heading
- 5. Add a form title
- 6. Select the form type. Choose from Worker, Contractor, Business
- 7. Select Publicity option from the drop down box
- 8. Add an introduction
- 9. Assign the registrants to specific groups

ATE NEW FORM	2	$\odot$	6	800	$( \mathbf{f} )$	(
Create custom field	User Accounts	Admin Permissions	Import/Export 🔻	Forms & Labels 🔻	Buy More Users	Мо
GENERAL INFORMATION						
SERVERAE INFORMATION						
The LMS consists of 3 registration forms (learner) who belong to a Business). Th						kers
You can create your own forms from sco email address, first and last name. You you like.						er
Form description	4 Page H	eading				
Please provide the type of field you wan create, along with a title and an option	al	tration Form				
ntroduction that can be displayed atop th orm.		itle (Internal only) *	F	orm Type *		
	5			Please Select		- (
	Publici	ty *				
	7 Anyo	ne can register an acco	ount (defaul 👻			
		uction				
	-	*   X 🔓 🛍   <i>I</i> x	B I U X2 X	* = = = =		
	3=	:: -}E -99   ∞	n 💌 🖬 🗰	$\Omega \equiv \Omega$		
	Style	s • Size •	<u>A</u> • ⊠• X [		Source	
Group Assignments	Auto-a	ssign the following gr	oups:			
You can automatically assign registrant specific groups. Note that businesses w						
automatically be assigned to a system generated business group and contract	Q	To search, start typing	g a group name			
will automatically be assigned to those		Human Resources				٦
groups however you can select addition		Information Techno	logy			
groups to assign these users as well.						
groups to assign these users as well.	- <b>Y</b> -0	People Skills				

- 10. Click Add Standard Field to add a default field to your form
- 11. Click Add Custom Field to add or create a custom field to your form
- 12. Click Rename to change name of field
- 13. Click Remove field to delete field from the form
- 14. Click and hold the hamburger icon to re-order the fields
- 15. Click Create once the form is complete

RM B	UILDER	
+ Ad	d Standard Field + Add Custom Field	
1	Title Mr	12
-	Role	
	First name *	1
1	Last name *	ø
1	Email address *	ø
	Username *	ø
	Password *	
1	Confirm Password *	
	<ul> <li>Must contain 6-12 characters</li> <li>Passwords must match</li> </ul>	
	Terms & Conditions *	/

### 6.6.9 User Labels

You can modify the labels that are used to represent each user type and these labels will immediately appear in all areas throughout the platform.

Note: To reset a label back to it's default, leave it blank. Custom names won't be applied in Certificate variables or Email Template variables.

- 1. Click Forms & Labels dropdown box in the top menu panel
- 2. Click User Labels
- 3. If You would like to change the user type label, click in Singular name / Plural name field, delete current name and re type desired name.
- 4. Click Save to save changes

SER LABELS	P er Accounts Adı	• min Permissions	Import/Export ▼	€ Eorms & Labels ▼	€ Buy More Users	● More ▼
← Back			I Mar	nage Custom Fields		
<b>User Labels</b> You can modify the labels that are used to	User Type	Singular Name	88 Mai	nage Forms er Labels		
represent each user type and these labels w immediately appear in all areas throughout the platform.		Admin		Admins		
Note: To reset a label back to it's default, leave it blank. Custom names won't be applied in Certificate variables or Email	Manager	Manager	3	Managers	3	
Template variables.	Worker	Worker		Workers		
	Business	Business		Businesses		
	Contractor	Contractor		Contractors		
	Visitor	Visitor		Visitors		
	Candidate	Candidate		Candidates		
Cancel					4	iave

### 6.6.10 Buy More Users

1. Click Buy More Users

					<b>1</b>	
USER ACCOUNTS	8	<b>(</b> +)	6	800	<b>(+)</b>	<b>(+)</b>
+ Add user	User Accounts	Admin Permissions	Import/Export 💌	Forms & Labels 🔻	Buy More Users	More 🔻

- 2. Fill out the form
- 3. Click Submit and one of our friendly team members will be in contact with you shortly

	CENSING REQUEST		<b>•</b>				0
	<b>G</b> Back		\$ E-commerce	isplay ▼	Platform 🔻	Developers	<b>P</b> About
	CONTACT POWERHOUSE HUB						
	Purchase Additional Accounts Please complete the form below and one of	First Name *		Last Name *			
	our friendly team members will be in contact with you shortly.	Email *			Phone *	412 345 678	
2		Number of Accounts *					
		License Requirements *					
							te
	Cancel					3 Subr	nit

#### 6.6.11 More

- 1. Username setting will take you to System
- 2. Registration setting will take you to System

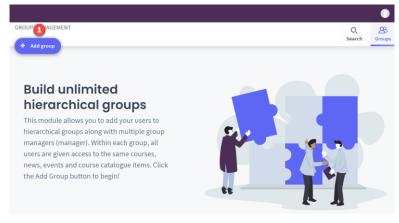
+ Add user		<b>Q</b> User Accounts	Operation           Admin Permissions	► Import/Export ▼	Forms &		Buy M	↔ Nore Users	(+) More ▼
						6	•	Username s	ettings
O _、 Search	Showing 8 of 8 Users				Sort by	Last	•	Registration	settings

### 6.7 Group Management

This module allows you to add your users to hierarchical groups along with multiple group managers (manager). Within each group, all users are given access to the same courses, news, events and course catalogue items.

### 6.7.1 Adding a group

1. Click add group



- 2. Add a group name and the group key will automatically populate
- 3. Add a short description. This is only visible to admins
- 4. Toggle ON to enable a group limit and then enter the maximum amount of workers that managers can assign to the group
- 5. Click Save to save changes

		0
DD GROUP		Groups
ADD GROUP		
Group Details To add a new group, enter the group name. The Group Key will automatically populate	Group Name *	
The Group Key will automatically populate. Add a short description of the group, if required.	Group Key *	
e	Short Description	ł.
Manager Group Limits You can set a limit for a group to ensure a Manager can only add/assign a maximum amount of workers to this group.	Enable Group Limit	
Cancel	Maximum amount of workers that managers can assign to this group.	Save

### 6.7.2 Adding a Subgroup

- 1. Click the hamburger icon
- 2. Click add subgroup

		•
GROUP MANAGEMENT		Q. 8
+ Add group		Search Group:
Total Groups: 1		
Group name	Description	Managers (manager) Users <b>0</b>
Human Resources		🛆 Edit group
Page: 1 of 1		2 th Add subgroup
		Assign users
		Assign branding
		🛒 Assign course catalogue
		C Assign courses
		Assign documents
		Assign events
		La Assign training plans
		Assign news
		Assign webinars

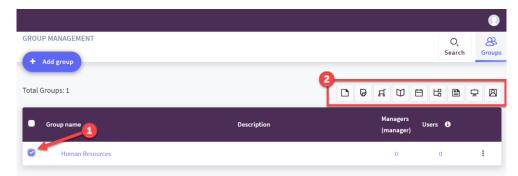
3. Add a short description. This is only visible to admins

- 4. Add a short description. Only the admins can see this
- 5. Toggle ON to enable a group limit and then enter the maximum amount of workers that managers can assign to the group
- 6. Click Save to save changes

Back	
SUB GROUP DETAILS	
Sub Group Details	Sub Group Name *
To add a new sub group, enter the group name. The Group Key will automatically populate. Add a short description of the group, if required.	3
	Group Key *
	Short Description
	•
Manager Group Limits You can set a limit for a group to ensure a	Enable Group Limit
Manager can only add/assign a maximum amount of workers (learner) to this group.	Worker (Learner) Limit
	0 Maximum amount of workers (learner) that managers (manager) can assign to this group.

#### 6.7.3 Assigning assets to groups

- 1. Select the group that you want to assign an asset to
- 2. Select the required asset. Options include:
  - Assign Documents
  - Assign Branding
  - Assign Course Cart
  - Assign Courses
  - Assign Events
  - Assign Training Plans
  - Assign News
  - Assign a Webinar
  - Assign Users



For the below example the Courses asset was selected

- 3. Select the courses you want to assign to the group
- 4. Click Save to save changes

GROU	PMANAGEMENT	Q Search	Groups
+	Add group	Search	Groups
	Items to Selected Groups (and sub-groups): In Resources, Recruitment)		
NB: Th	nis function only assigns selected groups to new items. It does not unassign.		
	Title		
0	Active Listening		
	Building Relationships with Customers		
	Building Relationships with Customers		
	Empathy 3		
	HR Basics		
	Onboarding		
	People Management		
	Workplace Health and Safety		
Ca	ncel	4	Save

### 6.7.4 Edit Group

#### 1. Click on the group name

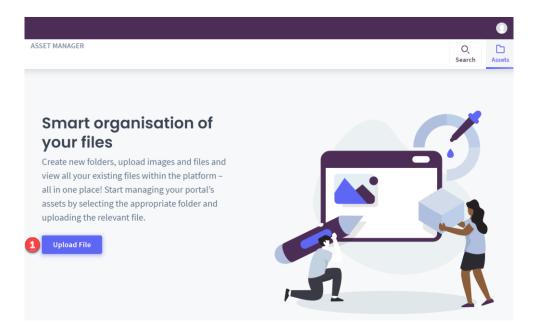
GROUP MANAGEMENT		Q, Search	Group
Total Groups: 1			
Group name	Description	Managers Users <b>(</b> (manager)	
Human Resources		0 0	

- 2. Make the required changes
- 3. Click Save to save changes

### 6.8 Asset Manager

Create new folders, upload images and files and view all your existing files within the platform – all in one place! Start managing your portal's assets by selecting the appropriate folder and uploading the relevant file.

1. Click upload file



### 6.9 Scheduled Tasks

A scheduled task is a job that runs at an interval automatically behind the scenes, the list below shows the currently enabled/disabled tasks on your platform.

- 1. Click to Disable and then click again to enable any schedule
- 2. Click view log to view the log

					Т
scheduled task is a job that atform.	runs at an interval automatically be	hind the scenes, the list below	shows the currently enabled	d/disabled tasks	on your
Schedule	Title	Last run	Next run		
Every day at 5:00am *	Course Delay	13/01/2022 05:09AM	13 hours from now	Disable	View L
Every day at 5:00am *	Course Expiries	13/01/2022 05:09AM	13 hours from now	Disable	View L
Every day at 5:00am *	Course ReInductions	13/01/2022 05:09AM	13 hours from now	Disable	View L
Every day at 12:00am *	CPD Renewal	13/01/2022 12:09AM	8 hours from now	Disable	View L
Every day at 5:00am *	License Expiry	13/01/2022 05:09AM	13 hours from now	Disable	View L
Once every 1 hours *	News Emailer	13/01/2022 03:03PM	1 minute from now	Disable	View L
Every day at 5:00am *	Program ReInductions	13/01/2022 05:09AM	13 hours from now	Disable	View L
Every minute *	Queued Jobs	13/01/2022 03:58PM	10 seconds from now	Disable	View Lo
Every 15 minutes *	Recruit Sync	13/01/2022 03:49PM	1 minute from now	Disable	View L
Every day at 5:00am *	Workflow Reminders	13/01/2022 05:09AM	13 hours from now	Disable	View Lo
Fasks may not run exactly at	t the time displayed.				

Please note:

- Tasks may not run exactly at the time displayed
- Tasks are intended to handle large time-consuming jobs more so than what a browser is patient enough to wait for, therefore you are unable to run these tasks manually on production servers.

# App Store

## Twilio Authy

This integration adds a secondary layer of security to login forms.

- You must have an account with Twilio Authy. If you don't, you can create one here.
- You must have created an application within the <u>Twilio Authy Console</u> and obtain the API key for that application to enter below.
- You should consider including the "Phone" field in your <u>registration forms</u> (it is included by default).
- The application name you choose will be visible to your users.
- The user must enable two-factor authentication themselves by providing a valid mobile number, or you can enable it for them by doing the same.
- The user will be required to enter a code that they will receive via SMS in order to login in future.
- If the OTP length does not match the settings within your Twilio Authy application, users will not be able to enter the code they receive correctly, wasting SMS messages and preventing the user from logging in, otherwise you may lock yourself and your users out.
- You must disable this integration prior to cancelling your Twilio Authy subscription.
- 1. Toggle ON to enable the integration with Twilio Authy
- 2. Login into your Twilio account and copy the API Key
- 3. Set the OTP Length. Please note this must match the setting with in your Twilio Authy account. If using with Google Authenticator you will need to set to 6 digits
- 4. Select an option to introduce your users to 2FA
- 5. Toggle YES if you want people to use other authenticators like Google Authenticator. This will allow us to provide users with a QR code that they can scan with their preferred authenticator app.
- 6. Click Save to save changes

Enable Integration	
APP SETTINGS	
API Key	
OTP Length Please Select 4	Introduce your users to 2FA by:
<ul> <li>Important: OTP length must match the settings within your Twilio Authy application.</li> <li>Enable Generic Authenticator Tokens:</li> <li>Allow users to use authenticators other than Authy.</li> </ul>	Do nothing Display an alert on their dashboard (until enabled) Force them to activate it by redirecting them to their profile.
Generic authenticator tokens must be also enabled in your Twilio Authy application settings if you want people to use other authenticators like Google Authenticator. This will allow us to provide users with a QR code that they can scan with their preferred authenticator app.	
	6 Save

- 7. To activate Two-factor authentication (2FA) click on the User Account Tab
- 8. Click on the name of the user account that you want to activate 2FA

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USER ACCOUNTS		User Accounts Admin Permission	ons Import/Exp	port 🔻 Fo	88 rms & La	ibels 🔻	Buy More Users	↔ More ▼
+ Add user								
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User type	User account	Login name	Groups	User type	2FA	Status	Last login	
All user types     Admin     Manager	Joe Thomas		Human Resources, Recruitment	Worker	•	Active	an hour ago	1
Business Worker Candidate	Eliza Hollow	8 ray eliza@nodomain.com	Recruitment, Human Resources	Worker	0	Active	4 days ago	I
Status <ul> <li>All statuses</li> </ul>	Holli Brian	holli@yourdomain.com	Human Resources	Admin	۰	Active	6 days ago	I
Active     Disabled	John Doe	john.doe	Human Resources	Manager	0	Active	4 days ago	i
2FA Enabled 🚱	Matt Ireland	matt.ireland	Human Resources, Recruitment	Contractor	0	Active	Never	ı
<ul><li>Enabled</li><li>Disabled</li></ul>	Matt Ireland	matti@powerhousehub.com		Admin	0	Active	25 minutes ago	•

- 9. Click Edit Details
- 10. Ensure a mobile number has been entered
- 11. Click to enable Two-factor authentication

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L Upload picture	User ID: User type: Username: Joined: Status: Last seen:	05/01/22 Active 11/01/22	<ul> <li>+61 4320</li> <li>Australia</li> <li>joe@noo</li> </ul>	3			
ACTIVITIES OVERVIEV	n	EDIT DETAILS	NOTES	ASSIGN	ED GROUPS	IMPERSONATE USER	
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