ACTO

Admin Guide to Learn

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

Learning Objectives

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

Quick Access

ACTO

How to Access ACTO on a Computer

ACTO's admin portal is only accessible via computer browser. Please use Google Chrome or Mozilla Firefox to sign in. User mode is accessible on both computer and mobile devices.

1. Enter your **company URL** into the browser's address bar. Your company URL (e.g., company.acto.com) and other key account information can be found in the first email you receive inviting you to ACTO.
2. Click Sign in with Email.
3. Enter your email address and create a password.
4. Please reach out to support@actoapp.com if you need assistance.

How to Access Learn

Owner, admin, drafter, and draft manager roles can create training on **Learn**.

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

Click the arrow to expand or detract the **Navigation menu** from anywhere on the platform. This menu gives you access to all the platform's different tools and capabilities.

Click your name on the upper right of the screen. Select **Switch Role** from the menu that opens up. This allows you to switch between **user mode** and **administrative mode**.
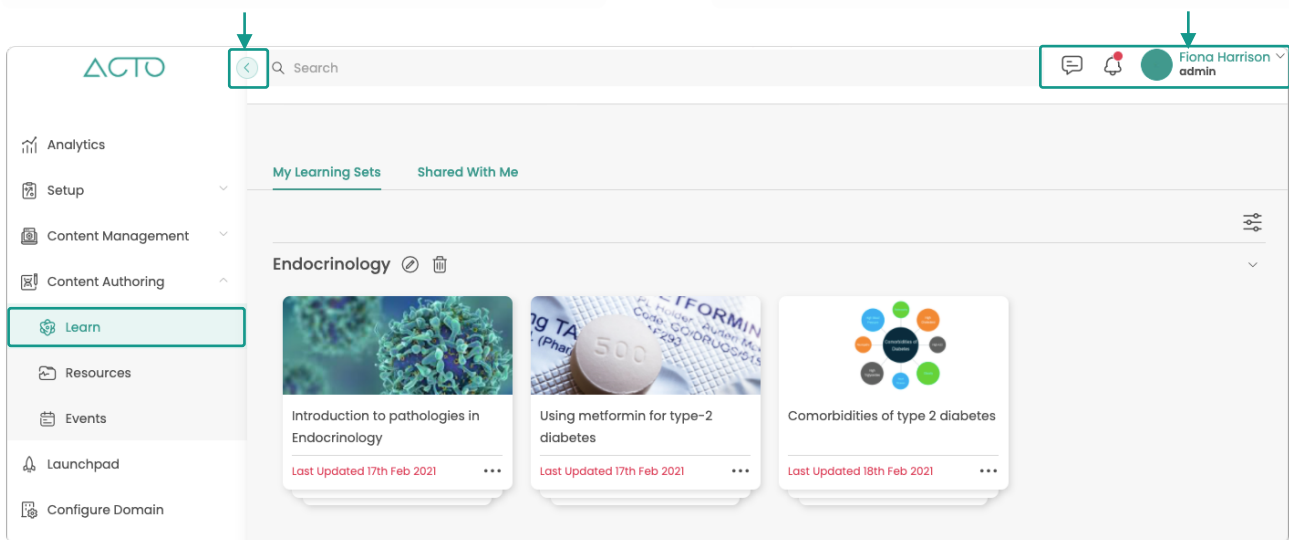
Click **Content Authoring** and select **Learn.**

1. Log in to ACTO on a computer. **Please use Google Chrome or Mozilla Firefox.**
2. Make sure you are in administrative mode. Users cannot access ACTO's backend.
3. Expand the **Navigation menu** on the left of your screen.
4. Click **Content Authoring** and select **Learn.**

Learn Quick Overview

- Content on **Learn** is organized into Categories, Learning Sets and ActionPacks.

- Learning Sets are 'folders' that contain one or more micro-learning modules called ActionPacks.

- Learning Sets are organized by Category. Categories are based on any number of classifications e.g., therapeutic area; product, clinical, or sales training; onboarding. ActionPacks within Learning Sets are further grouped together based on training type, subject, a specific product, etc.

- ActionPacks may contain engaging multi-media and resources like documents, videos, and images. ActionPacks may also contain interactive resources like checklists, quizzes, digital signatures.

How to Create a Category

1. Click Content Authoring from the Navigation menu. Select Learn.

2. Click the Create button on the top-right of the Learn homepage. Select Category.

3. Enter the Category name. Click Create.

4. To edit a Category click the **Pencil icon**. To delete a Category click the **Trashcan icon**.
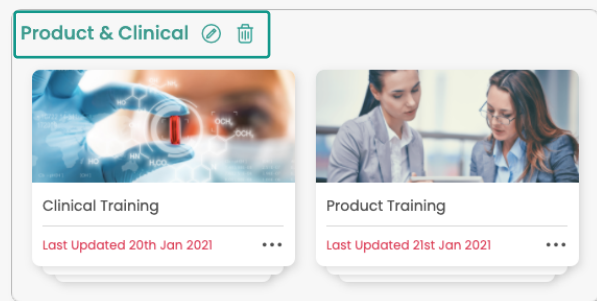
How to Create a Learning Set

Learning Sets are groups of ActionPacks organized in a 'folder' (i.e., Learning Set). Before creating a Learning Set, please create the Category it will live in. *Instructions on how to create Learning Sets are on the following page*

NOTE – Click Save after each section. Click Next Step from the wizard menu to move to the next section.

How to Create a Learning Set (continued)

1. Click Content Authoring from the Navigation menu. Select Learn.

2. Click Create on the top-right of the Learn homepage. Select Learning Set.

3. Proceed through the wizard. Enter the information in the following fields: Essentials, Stakeholders.

4. Click Save or Update after <u>each section</u>. Click Next Step from the wizard menu to move forward. When you have entered all the relevant information click Complete.

- **Essentials** Enter the Learning Set name, a short description, and select its category.

  Click **Certification** to have users receive a PDF certificate upon completion of the Learning Set.

  Upload a cover image and select a brand color to customize branding.

- **Stakeholders:** Add other administrative roles as collaborators. Set permissions for them.

- **Review & Complete:** Review all the information you have entered and click Complete.

How to Create an ActionPack

ActionPacks are micro-learning modules. Before creating an ActionPack, create the Learning Set it will live in.
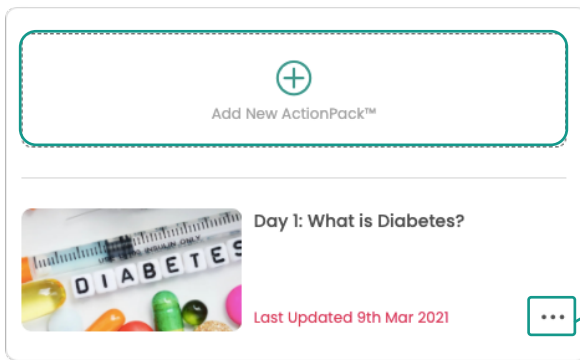
Click the **More icon** ••• on the side of an ActionPack to go back into to the wizard and **edit** or **update** the ActionPack at any time.

Click the **More icon** ••• on the side of a Learning Set to go back into to the wizard and **edit** or **update** the Learning Set at any time.

1. Click Content Authoring from the Navigation menu. Select Learn.

2. (1) Click into a Learning Set. Click Add New ActionPack on the top of the menu OR (2) Click Create on the top-right of the Learn homepage and select ActionPack.

3. Proceed through the wizard. Enter the information in the following fields: Essentials, Setup ActionPack, Competencies, and Tagging.

4. Click Save or Update after <u>each section</u>. Click **Next Step** from the wizard menu to move on.

- **Essentials** Select the Category and Learning Set the ActionPack belongs to.

- **Setup ActionPack** Click **Add New ActionPack**. Enter the ActionPack name and description. Enter a completion message for users to see once they complete training. Click **Sequential** if this ActionPack is part of a sequence of modules.

- **Tagging** Select relevant ActionPack tags.

- **Competencies** Select which user type(s) the ActionPack will be deployed to and what competencies they will be assessed on.

Key Structural Elements of an ActionPack

- **Topic.** An ActionPack is broken down into two sections: **Topics and Lessons**. A **Topic** is a main section within the ActionPack. A **Lesson i**s a sub-section within the Topic.

- **Lesson.** People learn better when accessing short and engaging content at their own pace. It is recommended to keep Lessons 5 to 7 minutes long, on average.

- **ActionPack Menu.** On the left of an ActionPack is the ActionPack menu. This gives users a bird's eye view of how the module is organized. It also allows you add, delete, and reorder Topics and Lessons and add **Forms** into the ActionPack.

How to Add Topics and Lessons to an ActionPack

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

NOTE – On the user side, the ActionPack Table of Content guides learners through the module and provides them with a bird's eye view of what to expect as their training progresses.

Glyatin for Type 2 Diabetes

Topic 1

Lesson 1
Add New Lesson

New Topic
Add New Lesson

Add
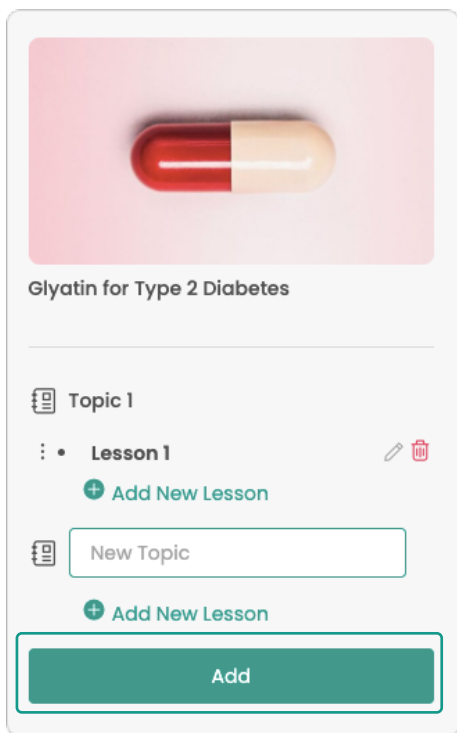
1. Click into an ActionPack from within its Learning Set.

2. To add a Topic to an ActionPack click Add from the ActionPack menu and select Topic. To add a Lesson to a Topic click Add New Lesson beneath the Topic.

3. To add content into a specific Lesson, click into the Lesson.

4. To reorder a Topic or Lesson, hover over it. **Three vertical dots** will show up. Use them to drag and drop the Topic or Lesson to the desired location within the Table of Contents.

5. To edit the name of a Topic or Lesson click the **Pencil icon.**

6. To delete a Topic or a Lesson click the **Trashcan icon**.

7. To add a Form into an ActionPack click Add and select the type of form. This pulls up forms that were previously created in the Content Management tool. Forms are interactive resources like quizzes, polls, surveys, and digital signatures.

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How to Add Content into a Lesson

Lessons contain a range of content and resources from videos and images to checklists and documents.
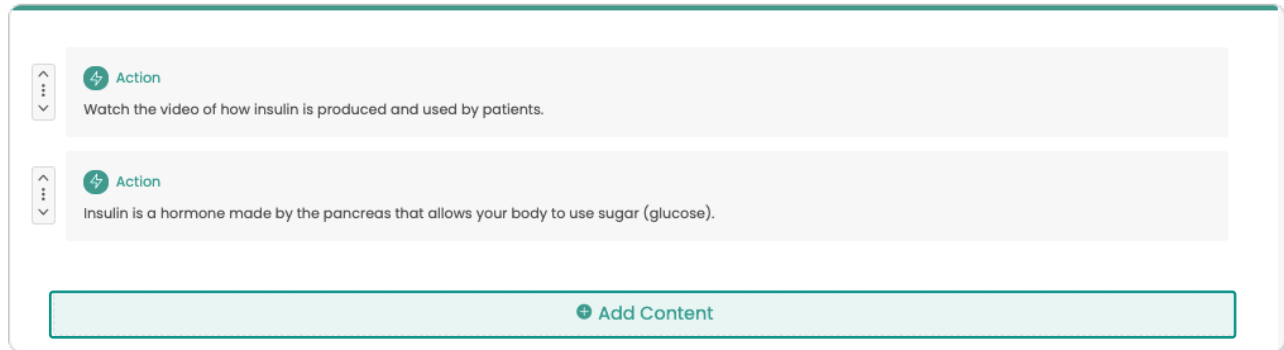
1. Click into the Lesson you would like to add content into. Click **Add Content**. Select a type of content or resource to add into the ActionPack.

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

3. Once you have entered all the content in a Lesson click **Save and Complete**.

> **NOTE** – When editing or updating a Lesson please make sure to click **Save** and **Complete** otherwise the updates will not be saved.

Available Resource Types in a Lesson

The following types of resources may be added into a Lesson when you select the **Add Content** button.

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

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

- **Description** – A formattable text box for additional 'nice to have' content that may not fit into existing resource types.

  NOTE - Actions, Protips, and Descriptions are created directly in Lessons. All other resource types are pulled into Lessons from the **Content Hub** where they have already been uploaded or created.

- **Image** – Images can include product, technical, and clinical-related images.

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

- **YouTube** – Embedded YouTube videos.

- **Checklist** – Important information that is broken down, highlighted, or reiterated in the form of a checklist.

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

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

- **Clinical Paper** – Uploaded clinical papers.

- **PDF** – Uploaded documents in PDF format.

- **SCORM** – SCORM files.

NOTE – The resources referenced here are uploaded or directly created in the **Content Hub**. Once they exist in the Content Hub, they can be pulled into ActionPacks and Collections.

Permissions for each resource are also set in the Content Hub.

To learn more, please reference the ACTO 3.0 Admin Guide to Content Management.

What are Forms?

Forms are interactive resources that can be added to ActionPacks. Forms do not exist within Lessons; they can be added independently in an ActionPack before or after a Lesson. Forms are created within Content Management using the Forms tool. They may be re-used across different ActionPacks.

The following Forms can be added into ActionPacks: Quiz, Survey, Poll, and Digital Signature.

- **Quiz** – Quizzes assess learner retention. Quizzes can be formatted in single choice, multiple choice, fill in the blank, matching, and long answer.

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

- **Poll** – Polls ask users to respond to a poll

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

If you have any questions, please reach out to support@actoapp.com. We are here to help.