



# IMPLEMENTATION QUICK START GUIDE



**BIZ**  **LIBRARY**  
YOUR ONLINE LEARNING PARTNER



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## Important Information

My site name: \_\_\_\_\_

Login information:

- Username \_\_\_\_\_

- Password \_\_\_\_\_

The implementation call will always live in your implementation library if you'd like to refer back to it.

My Client Success Manager is:

\_\_\_\_\_

Questions for my CSM and implementation support team:

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# Introduction

## Welcome to BizLibrary!

We're happy to have started this partnership with you. This document will serve as a quick-start guide while your organization goes through the implementation process. We aim to make this a seamless and user-friendly experience.

Don't forget, if you have questions at any time you can reach out to your Client Success Manager.

In this guide, we have highlighted the minimum actions you should take to get your learning platform ready to launch. Take a few minutes to review the action items outlined here for you.

## Let's Get Started!

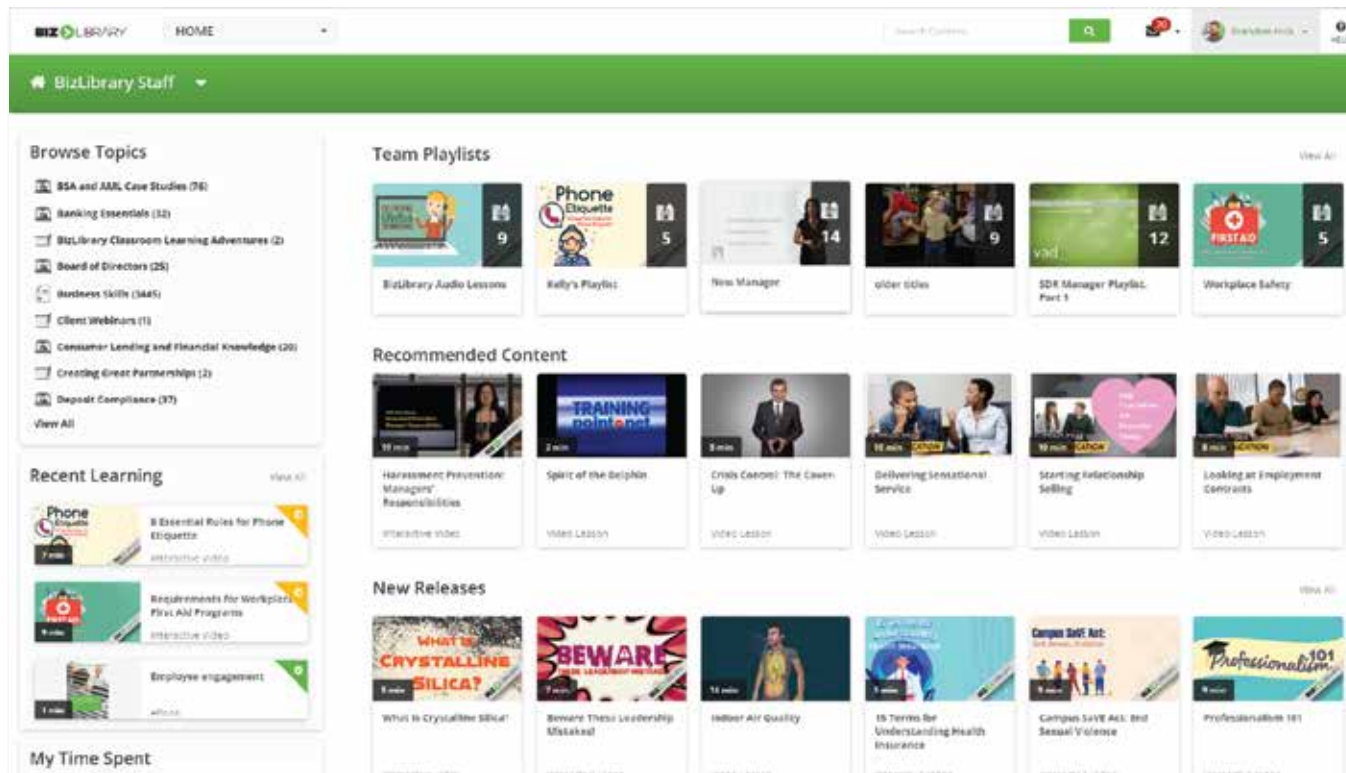
First, open any internet browser and type in your site name. An example site name might look like this: [companyname.bizlibrary.com](http://companyname.bizlibrary.com).



Once you're on the login screen, you will enter the username and password that has been set up for you.

*Tip: Make sure to change your password after implementation. All users will be prompted every 90 days to change their password for security purposes.*

# Login & Homepage Screens



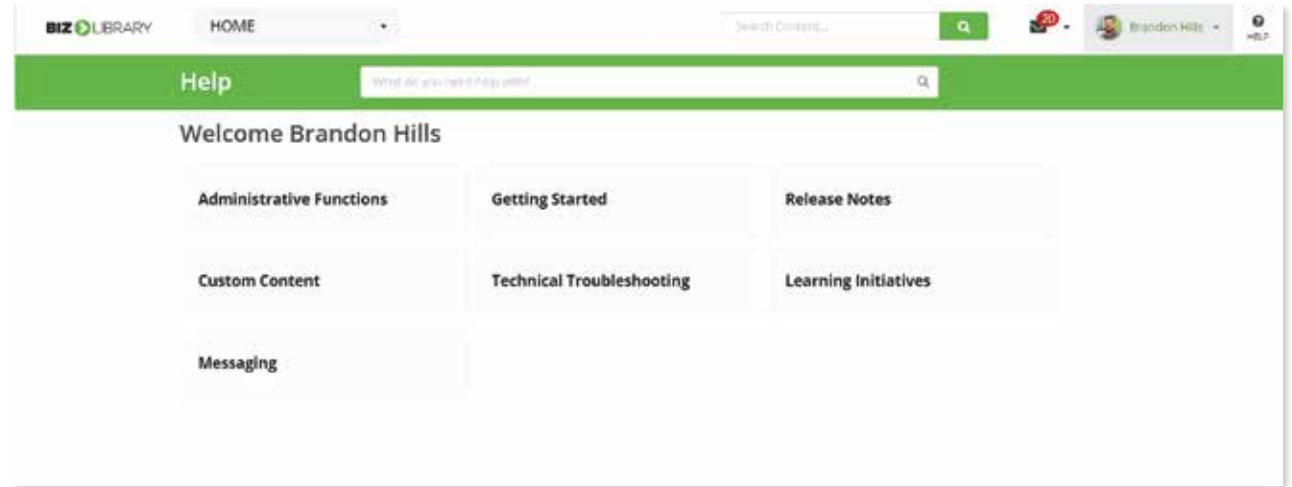
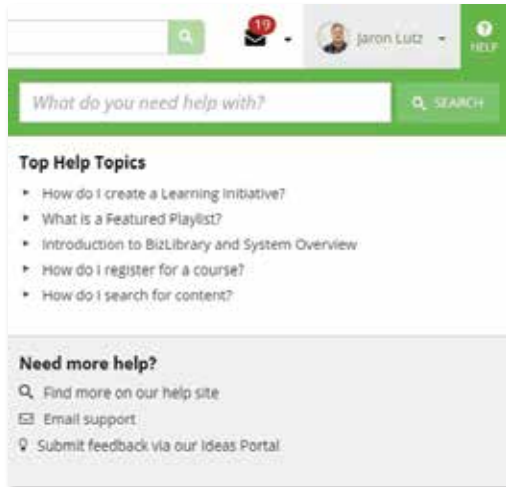
Once you're logged into the desired learning platform, you will automatically be taken to the homepage screen. This homepage is the same for administrators and learners alike.

From here, users can browse content by Topic, Format, Library, or Curated Learning Paths – all based on what they have access to. Users will also see various playlists that they have access to, and the learning Games that they're a part of.

*Tip: Featured Playlists are designated by the administrator, My Playlists are the user's personal playlist that they can share with other learners, and Shared with me are playlists that other learners have shared with that user.*

The user can also see **Featured News, Your To-Do List, Recommended for You content, Recent Learning, or submit an external training request from the homepage screen.**

## Inline Help



Know that you're not alone! If you need help, click the HELP icon at the top of the system. This will display suggested help articles for the page that you're on. From this section, you can also contact our support team, submit product ideas, or view additional help articles by clicking **Find more on our help site**.

*Tip: Client Support contact information is always listed at the bottom of the system for quick reference.*

### Contact Support

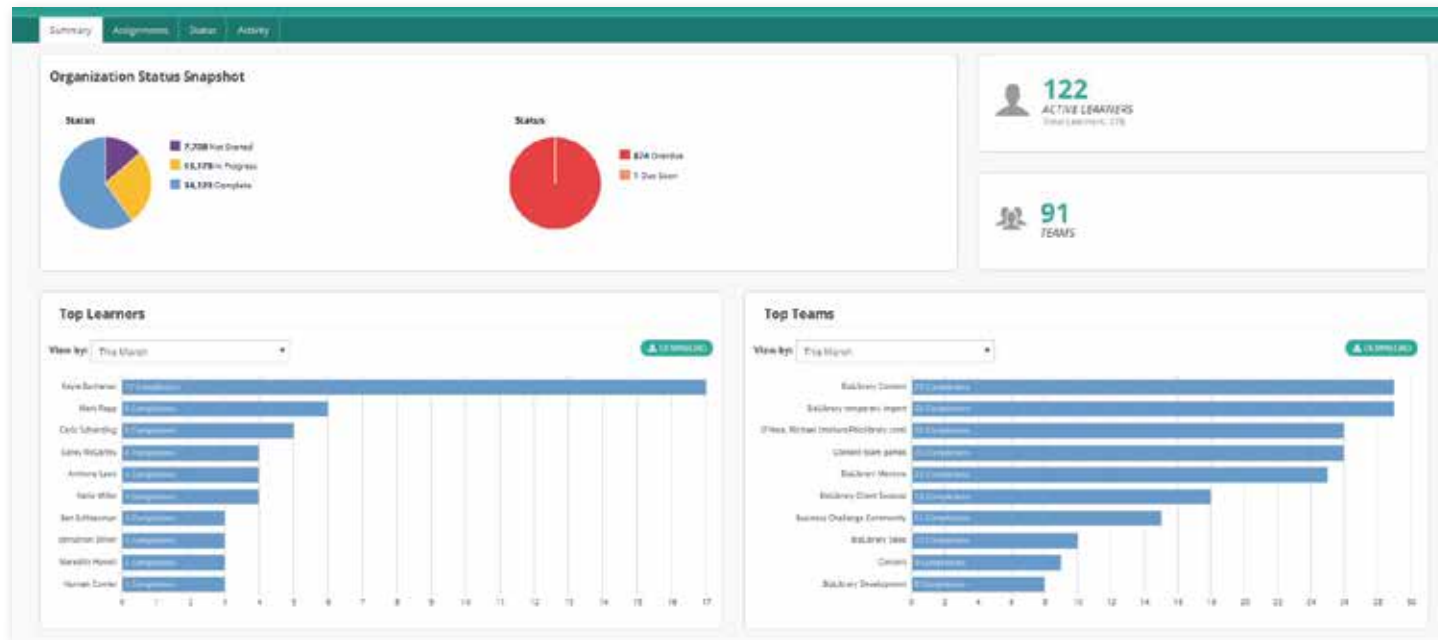
1.888.315.8707

[support@bizlibrary.com](mailto:support@bizlibrary.com)

Monday - Friday: 7:00AM - 7:00PM CST

Saturday - Sunday: 8:00AM - 5:00PM CST

# Administration Dashboard & Menu



By going to the main menu and clicking on Administration, you will be taken to the Administration dashboard. Here, you will quickly see the status snapshot for the organization, your number of active learners and team, top learners, top teams, an activity stream, recent assignments, and approval requests.

The Administration sidebar menu will always be present when in the Administration area of the system. From the sidebar menu, administrators have access to three main sections - People, Learning, and System.

You will want to focus on these three areas during your implementation!

## People - Managing Learners and Teams

Under People, administrators can set up Teams, Learners, and Approval Agents.

### Teams

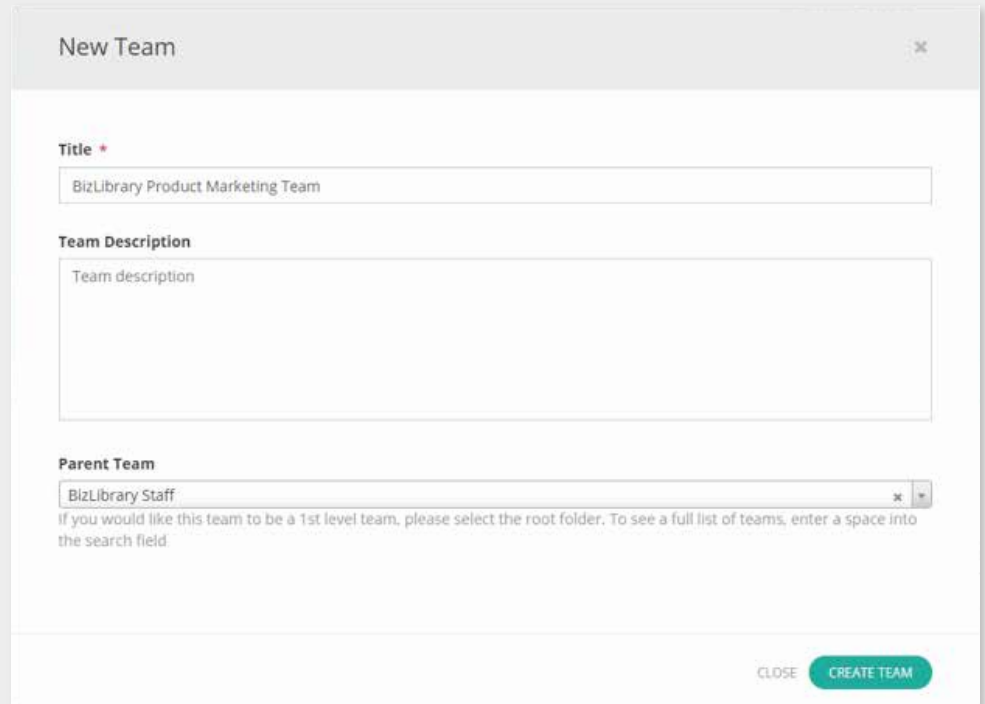
Teams are groups of learners that administrators create based on their assigning and reporting needs. Teams can be different departments, different divisions, or even different committees that you have in your organization.

## ACTION ITEM: SET UP YOUR TEAMS

Before setting up any teams, think of how you'll need to report. You may want to setup your teams by department, division, or even committee.

To set up Teams, select the People icon from the sidebar menu and select Teams. Select New Team from the top right corner.

1. Title your team
2. Enter a description for the team
3. Select a parent team
4. Select Create team



The screenshot shows a 'New Team' modal window with the following fields and options:

- Title \***: A text input field containing 'BizLibrary Product Marketing Team'.
- Team Description**: A large text area with the placeholder text 'Team description'.
- Parent Team**: A dropdown menu with 'BizLibrary Staff' selected.

Below the dropdown menu, there is a note: 'If you would like this team to be a 1st level team, please select the root folder. To see a full list of teams, enter a space into the search field.'

At the bottom right of the modal, there are two buttons: 'CLOSE' and 'CREATE TEAM'.

## Learners

Each account within the system is deemed a learner. Learners log in to interact with the system's features. All administrators are also learners. Not all learners are administrators.

## ACTION ITEM: ADD YOUR LEARNERS

To add new learners, you have two options – individual adds or import.

### 1. Learner Credentials

Username is typically a user's entire email address but can be a unique employee identification number as well. Create an initial password for each user – upon first-time login, employees will be prompted to reset their password.

### 2. Profile information

At a minimum, you'll need to have handy:  
First name  
Last name  
Email

*Tip: You can also include phone number, city, state, and country*

### 3. Client information

You will select the team the learner will be on here.  
You might also want to include the company name, department, title, job code, employee id (if applicable), learner's supervisor, hire date, and whether or not they're an instructor.

### 4. Review and create learner!

You can go back to make edit if necessary. Just click the X in the top right corner if you wish to abort creation of this learner.

**To import learners, select Import/Export Learners from the top right corner**

1. Select Import and download the import template to prepare your learner file.
2. Choose the team that the learners will be going on
3. Browse your local device and select the prepared import file
4. Select upload

The screenshot shows the 'Create New Learner' form at the first step, 'Learner Credentials'. The progress bar at the top indicates four steps: 1. Learner Credentials (active), 2. Profile Information, 3. Client Information, and 4. Review Information. The form contains three input fields: 'Username' with the value 'CCarpenter@CO.com' and a green message 'Username is available', 'Password' with masked characters, and 'Confirm Password' with masked characters. A 'CANCEL' button and a green 'NEXT >' button are at the bottom right.

The screenshot shows the 'Create New Learner' form at the second step, 'Profile Information'. The progress bar at the top indicates four steps: 1. Learner Credentials, 2. Profile Information (active), 3. Client Information, and 4. Review Information. The form contains several input fields: 'First Name' with 'Christian', 'Last Name' with 'Carpenter', 'Email' with 'CCarpenter@CO.com', 'Phone Number' with '314-555-5555', 'City' with 'St. Louis', 'State' with 'MO', and 'Country' with 'United States'. A 'CANCEL' button and a green 'NEXT >' button are at the bottom right.



## Approval Agents

Approval Agents allow administrators to track external training credits. Approval agents can also be used if the learner should request approval before they can take any internal lessons. Approval can be designated at any time!

## Learning - Managing Content

Under the Learning menu option, administrators have access to a wealth of functionality related to managing their training content.

### Libraries

Libraries are a collection of courses that are available for a learner to browse and view.

### Access to Libraries

Libraries are a collection of courses that are available for a learner to browse and view.

## ACTION ITEM: GRANT LIBRARY ACCESS TO LEARNERS

1. To grant library access, select Learning from the sidebar menu and then select Libraries.
2. Select the library for which you are wanting to grant access, choose the Access tab, and click +New Access.
3. Then, choose the desired team(s)/learner(s), and select +Grant Access.
4. From this same window, administrators can choose to select specific topics to grant access. If you are subscribed to the Boosted BLC – where learners can enroll to receive follow-up emails to reinforce training – you may also configure how enrollment works for assigned and self-directed content here.



## Curriculum Builder

Curriculum Builder enables administrators to search and explore content within the administration area of the platform while providing more advanced options to easily find content, make assignments, build curricula, and manage training with ease. The interactions an administrator has with content while in Curriculum Builder won't affect their personal learning status, scores, or transcripts. Administrators can specify search criteria to quickly narrow down the results of content and see exactly what the learner will see during their experience, including support materials and optional boosters!

## ACTION ITEM: SEARCH & PREVIEW CONTENT IN CURRICULUM BUILDER

To use Curriculum Builder, select Learning from the sidebar menu and select Curriculum Builder. You'll be taken to a search results view where you can choose various criteria to narrow down the content you wish to search for.

Example:

1. Select Business Skills from the Topics drop-down
2. Select 5 stars from the Average Rating drop-down
3. Select Quiz Required from the Features drop-down
4. Select Interactive Video from the Format drop-down
5. Select 5-7 minutes from the Duration drop-down
6. From here you can preview the content, feature a playlist, or create an assignment or learning initiative. Simply add courses to your Curriculum Draft by checking the boxes next to their titles. Click view Curriculum Draft, and choose whether you want to share, assign, or create!

The screenshot displays the Curriculum Builder interface. At the top, it says 'Curriculum Builder' and 'BizLibrary Staff'. Below that, there are filters for 'Active Filters' (The BizLibrary Collection, 5-STAR\*) and 'CLEAR ALL'. A search bar is present with 'Search content' and 'Search title only' options. Below the search bar, there are several filter buttons: 'Download All (195)', 'Export All (195)', and 'View Curriculum Draft (1)'. The main content area shows a table of search results with columns for Title, Duration, Code, Author, Format, and Archival Date. The selected item is 'Risk and Cost of Hiring Part-Time Workers' with a duration of 7 min, code SVL\_10558807, and format Interactive Video. A preview of the video content is shown below the table, including a thumbnail and a description: 'Welcome to the first and only of hiring Part-Time Workers' video lesson meant to explain the advantages and drawbacks of having part-timers on staff. This lesson is the second of six in the Hiring the Most of Part-Time Workers' video course, which is meant to educate everything about part-timers from the benefits of hiring them to tips for retaining them. Things like being well overhired and ordering the spent your time hiring part-timers on staff obsolete. Deplete the head of unnecessary and disconnectedness, part-timer's expertise can help fit in skill gaps and increase employee retention.' The interface also shows 'Support Materials' (Handout.pdf, Transcript) and a 'VIEW THUMBNAIL' button.

*Tip: Choose Release Date to view the newest content first.*

## Games

Games increase learner engagement with training content through social learning principles and friendly competition.

## Learning Insights

Drive company-wide utilization by comparing the average logins, launches, and completions by teams, as well as how your organization stacks up against other BizLibrary clients – within the same industry, top training companies, and total clients.

## System Features

Within the System section, administrators can control various aspects of the learning management system itself.

### Branded Sites

This controls the overall look of the platform. From this feature, administrators have the ability to make the system look like their own brand! You can modify your site name, add or change the logo displayed in the top left corner, add brand colors, edit or add an overlay color to the login screen, and change the login background image.

## ACTION ITEM: SETUP YOUR BRANDED SITE

To set up your branded site:

1. Enter your site's title
2. Determine your site name
3. Enter the hex value for your site's color palette
4. Enter the hex value for your login screen's background color. If you don't want a color overlay on the login screen, leave this field blank.
5. Add your logo file for additional branding
6. Choose a file for your login screen's background.

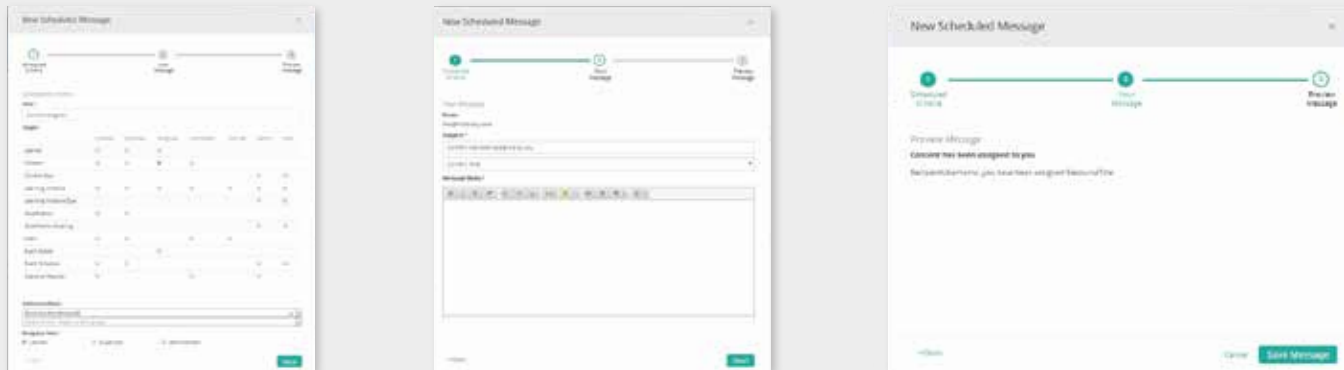
The screenshot shows a 'Create New Branded Site' form with the following fields and options:

- Site Title:** A text input field.
- Site Name:** A text input field with a dropdown menu showing 'bizlibrary.com'. Below it, a note reads: 'No special characters, no spaces, and all lower case letter required'.
- Brand Color:** A color picker field with a dropdown menu showing '#FFFFFF'. Below it, a note reads: 'Please provide color in a hex color format (e.g. #FFFFFF)'.
- Login Background Color:** A color picker field with a dropdown menu showing '#0070C0'. Below it, a note reads: 'Please provide color in a hex color format (e.g. #0070C0)'.
- New Logo:** A file upload section with a 'Choose File' button and a 'Clear' button. A 'No Preview Available' message is shown to the right.
- New Login Background:** A file upload section with a 'Choose File' button and a 'Clear' button. Below it, there is a checkbox labeled 'Show background overlay?'. A 'No Preview Available' message is shown to the right.

## Messages

Messages allow administrators to schedule system message based on certain triggers from the system.

### ACTION ITEM: SETUP YOUR SCHEDULED MESSAGES



To set up your scheduled messages, select New Scheduled Message from the top right corner.

- 1. Title your message and select the target criteria for which your message gets sent. For example, if you would like for your users to receive a message when they have been assigned content, then you would select the radio button corresponding with “Content” and “Assigned.” Likewise, if you wanted to remind them that a due date is fast approaching, you would select the button corresponding with “Content Due” and “Before”.**

*Tip: Some radio buttons will also allow you to enter a custom “Time Offset.” For example, if you want your assignment reminder to go out two days before an assignment’s due date, you would enter “2” and select the “Days” radio button.*

*For each message you want your Learners to receive automatically, you will need to set up a new scheduled message.*

- 2. Select Next to write your message. Please include a subject and a message body.**  
**If you want to personalize the email, you can choose to use the email replacement fields. This function takes values from the system and enters it into your email upon delivery.**
- 3. Select Next to preview your message. This is how your message will look to the recipient.**
- 4. Select Save Message to save your message to the system. All activities that meet this criteria going forward, will follow the triggered messaging rules you have just created.**

## News

The News area enables administrators to inform learners of new initiatives, deadlines, and features right on the homepage.

## Quick Set-up Checklist

- Determine how you'll set your learners' login info
- Find the recording of your implementation
- Find Inline Help articles
- Setup your Branded Site
- Add learners to your learning platform
- Create access to libraries
- Query a search in Curriculum Builder
- Notifications and Scheduled Message Setup
- Create an assignment for yourself

## Set-up Reminder

Don't forget, you always have access to Inline Help and our customer support team if you get stuck! We're here to help you through the implementation process.

### Contact Support:

1.888.315.8707

support@bizlibrary.com

Monday - Friday: 7:00AM - 7:00PM CST

Saturday - Sunday: 8:00AM - 5:00PM CST

## Additional Resources

