Welcome to Brainshark!

You just received a great communication from Your Supplier and would like to share it with your customers. The information is valuable and you know it is accurate and sanctioned by them. Brainshark helps you and your Supplier work together to communicate pertinent information quickly and easily to all who need to know it. This document will help you get started viewing, customizing, and sharing content.

Get Comfortable with Brainshark

What is Brainshark?

Brainshark is a cloud-based application that will allow you to: view, share, and report on video presentations. Your Supplier can make content available to you so you can learn about process or policy changes, deliver product updates, train your employees, market to your customers, and generate leads using the core message they provide. Your Supplier can also make these presentations available for you to distribute to *your* customers.

Content and Functionality

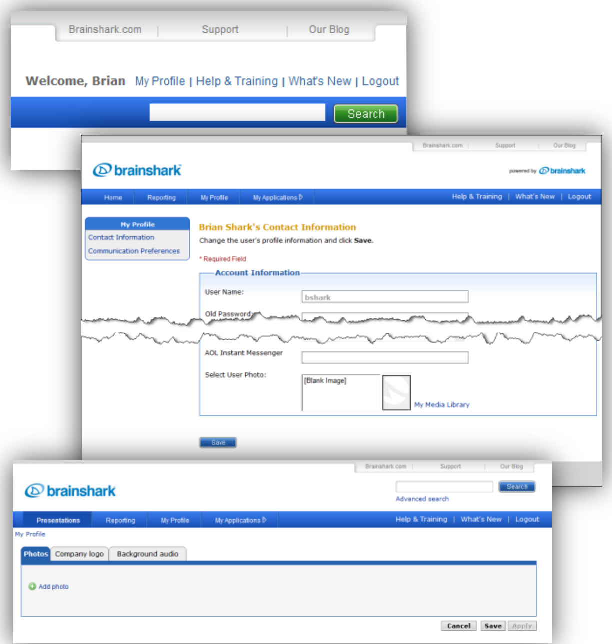
The following list is all of the functionality you have in your Brainshark portal.

- View Brainshark video presentations
- Share Brainshark video presentations
- Customize and co-brand Brainshark video presentations using the Personalize feature
- Add attachments
- Tracking and Reporting
    - Receive view receipts via email
    - Online reporting (date, time and duration of each view, and optional viewer specific tracking)

How to Set Up Your User Profile for Branded Presentations

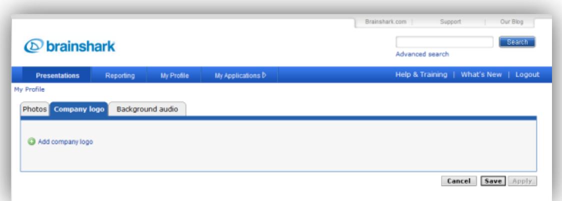
Once you have access to Brainshark, you should upload your company logo and your personal photo so your customers and prospects will recognize that presentations you choose to share are coming from you, their trusted advisor.

Add Your Author Photo



1. After logging into your *Content Portal*, click **My Profile** in the upper right corner of the screen.
2. Scroll to the bottom of your *Profile* and click **My Media Library**.
3. Click **Add Photo**.
4. Click **Browse** to locate your GIF or JPEG photo sized at 60X75 pixels.
5. Enter a name for the image.
6. Click **Save**.
7. Enter the Presenter Name and Presenter Title and click **Apply** to save changes and remain in *My Media Library*.

Add Your Company Logo



1. In **My Media Library, s**elect the *Company Logo* tab.
2. Click **Add company logo**.
3. Click **Browse** to select the logo image file, in GIF or JPEG format, sized 174x56 pixels.
4. The file name will populate the *Image Name* field, but you can enter a new name, if desired. Click **Save** to upload the file.
5. After the file uploads, you can add additional logos, rename the logo, or delete the logo. Make any changes needed and click **Save** to save your changes and exit the *Media Library*.

Get Back to the Main Screen of Your Content Portal

After you add your logo and photo in **My Profile** > **My Media Library**, select **Home** on the blue navigation bar at the top of the screen to return to the main page in your content portal to access presentations.

How to Customize a Presentation

Personalizing a presentation with your custom slides preserves the core presentation so that its author can make the changes necessary to keep it updated and ensure those changes funnel through to your customized copy of the presentation as well. Depending on what the presentation author has enabled, you can “wrap” the presentation (add your own slides to the front and back of the presentation), or replace up to 2 slides.

1. Select the presentation you would like to customize.
2. Click **Personalize this content**.
3. If you have already uploaded the slides you will use to customize the presentation, you can select from the slides shown on the screen, or click **Find Other Slides**.
    a. Click **Search** to locate and select presentation slides you have uploaded.
    b. **Skip to Step 5 below**.
4. If you do not have slides uploaded to Brainshark, or would like to upload new slides which you can use to personalize presentations, click **Upload More Slides**.
    a. Click the green **Upload a PowerPoint** button.
    b. **Browse** for the PowerPoint file you want to use, select it and click **Open**.
    c. Your file will start converting, click **Next** when the button appears.
    d. You’ll be presented with the Add Audio window.
        i. You can add audio now using your telephone or microphone.
        ii. You can choose to **Skip Adding Audio** for now and add or upload audio later.
5. Select the slides you want to use. You’ll see the slides you just added in the main section of the window.
6. There are two options for customization: wrapping and replacing
    a. Wrapping
        i. If your supplier has allowed you to “wrap” the presentation, they will determine how many, if any, slides to allow you to place before or after the core presentation.
        ii. Starting at the core presentation and working out, drag and drop each slide you would like to add.
        iii. As you add slides, Brainshark will tell you how many spaces are remaining, and the next spot will open up. You can add as many slides as you want, up to the limit set by the author.

iv. You can click **Apply** at any time during the process to save your work. If you make a mistake, drag the slide back to the slide bank to remove it.

v. When you are finished, click **Save** to preserve your changes and return to the *Presentation Properties* tab.

b. Replacing

i. The slides that may be replaced in the presentation you are customizing will be grayed out and bordered with a red dotted line.

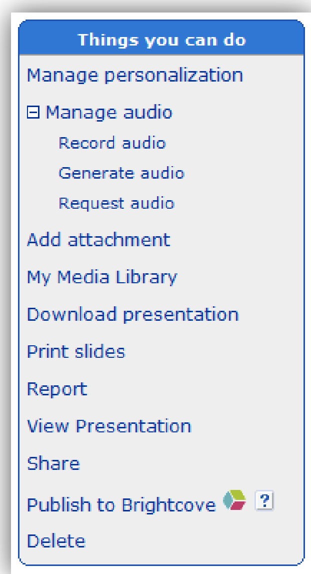
ii. Drag and drop the replacement slides to their appropriate locations, one at a time.

7. If you have pre-recorded audio files to associate with your presentation slides, click the **Audio** link below each slide to upload one file per slide. Then click **Browse > Open** to select the audio file.
8. Click **Save** to preserve your changes and return to the *Presentation properties* tab with the *Things you can do* menu at the left.
9. If you need to change the replacement slides you selected, select **Manage personalization** on the *Things you can do* menu and repeat process steps 3 through 6 above.

Add Audio to a Presentation

If you didn't add audio after you uploaded your slides, or if you need **Request audio** from a Guest Author, you can do so from the **Manage audio** option on the *Things you can do* menu. If you need to upload pre-recorded audio files, you can do so from the **Manage personalization** option on the *Things you can do* menu.

<u>Add Your Own Voice</u>



1. Select **Manage audio** on the *Things you can do* menu.
2. Select **Record audio**.
3. Follow the onscreen instructions to use the phone or a microphone to record audio. For more detailed instructions please see the [Adding and Managing Audio](#) document.
4. To cancel out of recording audio, click the **<u>Edit <Presentation Name></u>** link at the top of the window.
5. Click **Manage audio** > **Record audio** at any time to add or re-record audio on the presentation.

Request Audio from a Guest Author

1. Before you send out a guest audio request, ensure that Require User ID and password to view presentation is not selected on the Security tab so guests can access your presentation regardless of whether they have a Brainshark login.
2. Select **Manage audio** on the *Things you can do* menu.
3. Select **Request audio**.
4. Click **Send a New Guest Voice Request**.
5. Enter the Guest Author's email address in the **To** field, or click **Find** if the Guest Author is a registered user in the site.
6. Make changes to the email message as needed, being careful not to change any items in between **<< >>**, especially the **<<GuestAuthoringLink>>**.
7. Click **Send Invitation**.

Upload Pre-recorded Audio

1. Select **Manage personalization** from the *Things you can do* menu.
2. Click the **Audio** link under the slide where you want to upload the audio.
3. Click **Browse** and locate the file.
4. Double-click, or select and click **Open**.
5. Repeat steps 1-4 above as needed.
6. Click **Save**.

Add Attachments or URLs

1. Select **Add Attachment** from the *Things you can do* menu.
2. Locate the file you would like to attach or enter the full path of the web page (http://www.domain.com)
3. Change the *Title*, if desired.
4. Click **Save**.
5. You will be directed to the *Attachments* tab, and you can remove or edit the details of any attachment you have included. You can reorder multiple attachments by dragging them into the correct order.
6. Click **Save** to save any changes.
7. Repeat these steps to add another attachment.

Brand Your Presentation before You Share

Although you have added your company logo and your personal photo to your Brainshark site, you can still choose whether to include either or both of those items prior to sharing.

Apply Your Company Logo to the Presentation

Once your company logo is in the Media Library, it is easy to apply it to a presentation.

1. Select the *Options* tab.
2. In the Display section, select **Company logo**. Brainshark will automatically use the default logo you uploaded to *My Media Library*. If you have uploaded more than one logo, use the drop down to select the desired logo.
3. Click **Apply** to save your changes and remain in *Edit Presentation*.

Apply Your Author Photo to the Presentation

Once your photo is in the Media Library, it is easy to apply it to a presentation.

1. Select the *Options* tab.
2. In the Display section, select **Presenter photo and bio**. Brainshark will automatically use the default photo you uploaded to *My Media Library*.
3. Click **Apply** to save your changes and remain in *Edit Presentation*.
4. If you need to change the photo or author information displayed with the presentation, select Manage Personalization.
5. Click **Edit** under the first slide you need to change the author for.
    a. *Change author photo only*: Select **Use image library** and select the photo from the drop down.
    b. *Change author displayed*: Select **Use specific author** and select the author you would like to use.
    c. *Make changes to all slides*: Select **Apply author to all remaining slides**.

    NOTE: you can only change author information for the slides that you wrap or replace with. The core presentation slides will not be changed.
6. Click **Save** to save changes.

How to Share a Video Presentation

Once you have finished personalizing a Brainshark video presentation and are ready to send it out, you can either send it through your site, or paste the URL for the presentation into an e-mail using your e-mail application.

Share from within Brainshark

1. Select **Share:**
    a. After selecting the presentation in the Content Portal, under the presentation preview
    b. When editing, from the *Things you can do* menu
2. Enter the email address of the customer, separating multiple email addresses with a comma.
3. Modify the **Subject**, **Intro** and/or **Closing** message, as desired.
4. Select **Notify me when this is viewed** to receive a View Receipt email telling you when your presentation has been viewed. For more about view receipts, see the *Receive and Analyze View Receipts* section on the next page.
5. Click **Send**.

Share a URL through E-mail

1. You'll need to copy ([**Ctrl**] + [**C**] to copy) the link for the presentation to share through your email. Get it from:
    a. *Content Portal* view: click **Embed/Link** under the presentation preview.
    b. When editing, on the *Presentation Properties* tab: **Stand-alone Player URL** or **Landing Page URL.**
2. Paste the presentation URL ([**Ctrl**] + [**V**] to paste), into an e-mail to send it through your e-mail client.
3. Compose your email, address it, and send it.
4. Add a tracking code to the presentation URL if you want to know more about the person(s) viewing your presentation but decided against enabling the Guestbook. For more information on using tracking codes, please see the *Adding a Tracking Code* document.
5. You will receive *View Receipts* as long as the **Notify me when this presentation is viewed** checkbox is selected on the *Presentation properties* tab.

How to Report on Viewing Activity

Receive and Analyze View Receipts

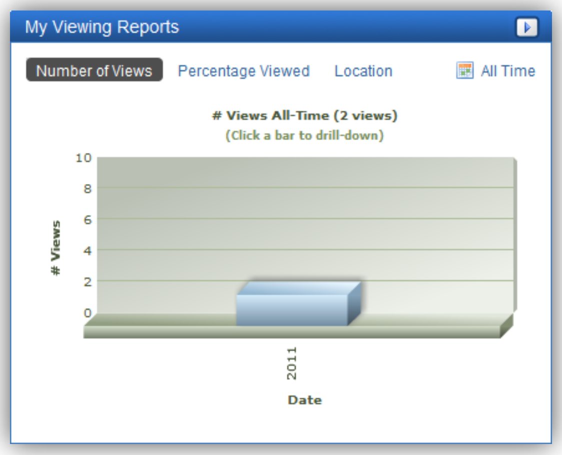
If you or the presentation author selected *Notify me when this presentation is viewed* prior to sharing, you will start receiving View Receipts in your e-mail Inbox when customers begin viewing the presentation. The View Receipts will give you information about:

- who viewed the presentation and for how long
- when the presentation was viewed
- how many slides were viewed
- answers to any questions or polls that were included

Once you get a View Receipt, you know your customer has just looked at the presentation you sent. This is the best time to follow-up with the customer. The longer you wait, the colder the lead gets. Use the information contained in the View Receipt to prepare for your follow-up call, but it is best not to start the call with “I just saw that you watched slides 1-4 then downloaded the attachment I included, ” as it may turn off your customer.

You’ll also begin to learn what time of the day and day of the week your customers are watching your presentations and can begin to target future presentations to the best viewing time for your customers. In our experience, the best day and time to send the presentation is Wednesday, mid-morning, customer time.

View Report Tiles



Basic reports are available from the main screen of the presentation. You’ll be able to see the number of total views, views by month, and views by day, for all time, year-to-date, and month-to-date. You can also see the percentage of views based on how many invitations were sent as well as where in the world the presentation was viewed.

1. If you are in *Edit* mode, click **Save** to return to the main screen.
2. Click the *My Viewing Reports* bar to expand reporting.
3. Double-click the bar on the graph to drill down.
4. Select the calendar to change the date range: *All Time*, *Year to Date*, *Month to Date*.

Run Viewing Detail Report

The Viewing Detail Report gives a more in-depth look at how your presentation is being viewed, including the date and time, the viewer (if a Guestbook was used), Viewing Time, Slides Viewed, % of Slides viewed, and the Tracking code (if one was included). **NOTE**: If the presentation was accessed via QR Code, “qr” will be listed in the tracking code field for that view.

From the *What Can I Do Now* menu in the content portal, select **Run Viewing Detail Report**.