

## **Manage My Site**

Now that your Brainshark site is active, you are faced with the responsibility and challenge of getting things right for everyone who will use it. This document will help you determine the best Brainshark settings for your Company and your Authors so everyone can be successful with Brainshark.

### **Consider Your Company**

The changes you make in the Administration section of your site align the use of Brainshark to your Company's needs. Brainshark allows administrators to mirror existing network policies and restrict access to the site and its contents where necessary. Simply logging into Brainshark and accessing the Administration options enables you to manage roles and permissions, viewing access, user authentication, and password requirements, history and lockout thresholds.

### **Think about the Impact**

When you change a setting in Administration, it affects the entire site. You'll need to consider how authors across your company will be using Brainshark as well as what information you need from your audience now and in the future. Any Administration setting can be changed as your needs change and your use of Brainshark evolves.

To start, ask yourself:

- How will your company policies and processes affect the settings in your Site?
- What generally accepted principles guide creation of communications at your Company?
- Do you need to restrict access to the site?
- What user authority levels will exist?
- How will you determine who can create content?
- Will your Authors need to create both public and private content?

If there are hard and fast rules that your authors need to follow, then this is the time to establish those guidelines in Brainshark.

## Use Your Resources

As you begin to incorporate Brainshark as part of your communication strategy, be sure to use these Help and Training tools:

- [Create Content](#): The tutorials in this section will help authors scope, script and create content.
- [Edit Content](#): The tutorials in this section will help authors identify and enable the appropriate combination of Brainshark features and settings to meet presentation goals.
- [Get Certified](#): While becoming Brainshark Certified, authors are exposed to the features and functionality in Brainshark and how to use them at the right time and in the right place in communications.
- [Online Training](#): Authors can register for a wide range of online classes to learn how to get started or hone their Brainshark skills.
- [Brainshark Support](#): Support is always there to help with questions or technical issues.

## How To

*Access the Manage Company Section of Administration*

1. Log into Brainshark
2. Select **My Applications** from the main navigation ribbon
3. Select **Administration**

## Manage Company > Display Information

The Display Information page lists the current contact information for your Company's Brainshark site. It is important to keep this information updated; if there is any erroneous information, or at any time the contact changes, please [email](#) our Technical Support Team with the updated information.

## Manage Company > General Preferences

The General Preferences page contains controls for four general settings. These settings impact the global site; be sure to consider your Company's policies and use of Brainshark as you adjust them.

### *Default Application*

This setting controls the page users see upon login. Options may include: Presentations, Administration, Campaigns, Rapid Learning, and Content Portal.

**NOTE:** Not all options are available on all sites.

**Presentations:** The presentation creation module, where content creators quickly and easily turn business materials into powerful voice-enriched Flash presentations, is Brainshark's 'core' application. This application contains complete authoring, editing, interaction, delivery, tracking, and reporting capabilities.

**Rapid Learning:** This module combines the ease of Brainshark content creation with Learning Management System (LMS) functionality, including creating, assigning and tracking completion of eLearning courses and curriculums for individuals and groups; includes exception and analysis reporting on the individual, group, manager and administrative levels.

**Content Portal:** Optional view of existing site content; the content that a user will see when logged in is governed by folder permissions set at the User level.

Choose one of three recommended settings:

- ✓ Set to **Presentations** to enable users to log in directly to the place where they can create content.

OR

- ✓ Set to **Rapid Learning** when Students are logging into the site; upon login, immediately provides them with a view of currently assigned courses and curriculums.

OR

- ✓ Set to **Content Portal** to enable search, ranking and rating of content.

### *Email Report Options*

This setting controls the format for emailed reports. It allows for the conversion of the report to a zip format for larger file sizes.

Choose one of three settings:

- ✓ Set to **Zip attachment (and customize size in MB)** and any report less than the designated size will be attached to the email in its raw format (.csv, .xml, PDF); any report larger than the designated size will be attached in a zip file.

OR

- ✓ Set to **Always zip attachment** and all reports will be attached to the email in a zip format.

NOTE: If your Company restricts access to or blocks zipped files, do not select this option.

OR

- ✓ Set to **Never zip attachment** and all reports will be attached to the email in its raw format (.csv, .xml, PDF); no files will be zipped, no matter the size of the file.

### *Quick Login*

This setting controls whether or not the application will save a cookie on the user's computer to store user name and password data for faster subsequent login.

### *Forget Password*

This setting controls whether or not the application will automatically generate a response email with a link to reset forgotten passwords. If this is set to **No**, the Administrator will have to manually reset all user passwords.

## **Manage Company > Presentation Settings > General Properties**

The General Properties page contains controls for five general presentation settings. These settings impact the global site; be sure to consider your Company's policies and use of Brainshark as you adjust them.

### *Author per slide*

This setting controls whether or not presentation Authors have the ability to change the presenter photo on any slide to reflect someone other than the presentation author.

### *Email Receipts on URL*

This setting controls whether or not a presentation link or URL can be appended with a modifier that would send a view receipt notification to someone other than the person(s) designated by the presentation author.

### *Limit Amount of More Information*

This setting controls whether or not the **More** link in the presentation viewer displays specific presentation information. Selecting **Yes** will exclude the following information from display in this location: folder name, URL, author's email, company name, department and phone.

### *Background Audio*

This setting controls whether or not Authors have the ability to use background audio in their presentations. Separately controlled but still included in this section is the setting for allowing Authors to upload background audio files for use in their presentations. Considerations include copyright issues, as well as potential for upload of inappropriate audio files. Since the settings are not dependent on each other, you can grant Authors the ability to use Brainshark supplied- or Company approved-audio files without allowing for the upload of additional files by authors. (See also **Manage Company > Media Library > Background Audio.**)

### *Publish to YouTube\**

This setting controls whether or not Authors are able to publish presentations to YouTube.

NOTE: See the [Publish to YouTube](#) presentation for specific information and considerations.

## **Manage Company > Presentation Settings > Presentation Security**

The Presentation Security section contains controls for three basic security concerns affecting site access and presentations.

### *Login Required*

This setting control whether or not presentation Authors have the ability to create public presentations, set a login requirement for presentations they create and the default setting for all new presentations created in the site.

### *Presentation Expiration*

This setting allows an Administrator to designate the person(s) who will receive email notification of presentations expiring in the site, and at what timeframe intervals. The Primary Expiration Message and Expiration Instructions can be customized.

### *Presentation Copy*

This setting controls whether or not presentations are available for copying by other Authors in the site. Authors can be given the ability to override the chosen default.

## **Manage Company > Presentation Settings > Viewer Options**

The Viewer Options section enables Administrators to determine default settings for presentation features.

**NOTE:** Not all options are available on all sites.

### *Image Branding*

This setting controls image consistency across presentations. If there are multiple Company logos, Authors can be given the ability to override the default logo. If presenters differ from content creators, or there could be multiple presenters for a particular presentation, Authors can be given the ability to override the Author Photo.

### *IM Presence\**

This setting identifies the instant message vendor which will integrate with Brainshark. When enabled, this feature provides access between the presentation viewer and a designee through the viewing console of a presentation.

### *Slide Notes*

This setting controls the default setting which allows Authors to make presentation scripts/slide notes available to the viewing audience. Where scripts are not appropriate to share, Authors can be given the ability to override the default.

### *Email Invitations*

This setting controls whether or not viewers have the option of forwarding presentations to others from within the presentation viewing console. A site-wide default setting can be selected.

### *Embed Link\**

This setting controls whether or not the option to embed is presented to viewers of a presentation. Authors can be given the ability to override the selected default. Embedding a presentation shows the presentation directly in a web page without having to open a separate window or click a link.

### *Display Completion Indicator*

This setting identifies whether the Completion Indicator will display in the presentation viewing console for any presentation where a Completion Requirement has been set. Authors can be given the ability to override the default.

### *Unhooked Presentations\**

This setting provides Authors with the ability to allow presentations to be downloaded for offline viewing. A default can be selected for new presentations and the format of the download.

### *Email a Question*

This setting controls whether or not presentation viewers can be given email access to a designated subject matter expert through the presentation viewing console. Authors can be given the ability to override the default setting.

### *FAQ*

This setting identifies whether a presentation Author can create a frequently asked questions section in the presentation viewing console for viewers to access. Authors can be given the ability to override the default setting.

### *Print Slides*

This setting controls whether or not Authors can disable the Print option from the viewing console. If enabled, presentation viewers can print an HTML copy of the presentation content in the presentation. The script/slide notes are printed when the Slide Notes feature is also enabled for the presentation.

### *Presentation Sharing*

This setting controls the default setting enabling users to create custom introduction/closing slides and wrap existing presentations in the site.

## **Manage Company > Presentation Settings > Guestbook Options**

Adding a Guestbook to a presentation allows you to gather information from your viewers. The Guestbook Options section allows you to enable the fields your Company will make available to presentation Authors. At the presentation level, Authors determine the fields appropriate for that communication. If your Company needs exceed the available default fields, additional custom fields can be created here; further, Authors can be given the ability to override custom fields, creating an unlimited capacity for customization.

### *Remember Me*

This setting controls whether or not viewers of presentations can have a cookie stored on their computer for faster, subsequent completion of Guestbook fields. Authors can be given the ability to override the default.

### *Available Fields*

This setting controls the Guestbook fields which are made available for presentations created in the site. Check to enable or disable; customize the field label that displays to presentation viewers; and optionally create a drop-down list of selection options. Authors can be given the ability to override custom fields and all existing presentations can be updated with the displayed settings, if desired.

## **Manage Company > Presentation Settings > Guest Authoring\***

A Guest Author is anyone invited by an Author who is granted one-time access to create and add audio to a presentation. Limited authoring and presenter rights can be given to Guest Authors; presentations they create can either be inactive or active immediately upon creation, depending on approval or compliance limitations existing at your Company. **NOTE:** This feature is not automatically enabled for all sites but can be activated by emailing [Technical Support](#).

### *Allow Requesting Authors to edit/delete presentation they requested*

This setting controls whether or not Requesting Authors have the ability to edit or delete presentations they requested.

### *Allow Guest Authors to own presentations*

This setting allows Requesting Authors the ability to grant ownership of presentations to Guest Authors.

### *When completed, Guest Author presentations are active*

This setting controls whether or not presentations are automatically made 'active' when the Guest Author declares a Guest Author request complete. When set to **No**, the active/inactive status of a presentation is not changed when the request is declared complete.

## **Manage Company > Manage Templates > Email Templates**

A Brainshark Administrator can customize the email templates stored in the Company's site. Two templates are available for customization here.

### *Email Intro*

You can customize the default message displayed when using "Share" to invite others to view a presentation.

### *Email Footer*

This controls whether or not to remove the standard Brainshark message displayed when using "Share" to invite others to view a presentation.

### **Manage Company > Manage Templates > Quick Note Templates**

A Brainshark Quick Note is a one slide presentation generated from a template that is already stored in Brainshark. An Administrator can customize the background template so that any user can quickly access the Quick Note options and create a short communication. Examples include: meeting invitation or follow-up, new employee introduction, status update.

### **Manage Company > Manage Templates > Question Settings**

When an Author creates a presentation by uploading a PowerPoint slide deck, and then adds a Question Slide to the Brainshark presentation, the aesthetic from the uploaded PowerPoint will be automatically applied as the background for the question. It is possible for the Administrator to upload a custom background that will be used by default; if the Administrator has uploaded a default template, that template will take precedence over any uploaded presentation template. Additionally, Authors can be given the ability to override the default background and upload their own images in the Media Library. Settings here refer to the default background, colors, layout and footer.

### **Manage Company > Manage Templates > Certificate Templates**

A Brainshark Administrator can customize the certificate templates stored in the Company's site. Three templates are available for customization here.

**NOTE:** Not all options are available on all sites.

#### *Presentation Certificate Text*

Customize the default text displayed when a completion certificate has been enabled for a presentation or a Rapid Learning course.

#### *Course Certificate Text\**

Customize the default text displayed when a completion certificate has been enabled for a Rapid Learning course.

#### *Curriculum Certificate Text\**

Customize the default text displayed when a completion certificate has been enabled for a Rapid Learning curriculum.

### **Manage Company > Media Library > Company Logos**

The Media Library is a repository of images made available to Authors in the site for use as logos and presenter photos. Sources for images include: Administrators, the Authors themselves, or a combination of both. On this page, the Company Logo that displays to users while they are logged into the application can be customized and enabled as a live web link.

### **Manage Company > Media Library > Background Audio**

The Background Audio page allows Administrators to add background audio files which can be made available to Authors for inclusion in their presentations. Background audio can be added to a presentation to create a more compelling message to viewers. Use this page to rename, upload, download, replace and delete background audio files. (See also **Manage Company > Presentation Settings > General Properties.**)

### **Manage Company > Advanced Options > Logins & Passwords**

The Advanced Options section of Administration enables Administrators to control more secure or complex options.

#### *Launch a URL link on login*

You can designate a URL to be presented to new and existing users immediately upon login to the site. Perhaps a welcome presentation detailing use policies/procedures and training resources would be helpful to new users at your Company.

The remaining nine settings relate to the application of a password policy and can be adjusted as needed so that site passwords comply with your Company policy.

#### *Lockout Email*

This setting can be used to notify an individual or group whenever a user attempts to log into the site and is locked out for repeated unsuccessful attempts.

#### *Change Password on Next Login*

Clicking this button will cause all existing users to be forced to reset their passwords on their next login. This setting is useful when updating to a new password policy and existing users' passwords must also be changed to comply.

### **Manage Company > Advanced Options > Self Registration**

Our Technical Support team is available to help you set up self-registration preferences and templates for your site. [Contact us](#) to schedule a complimentary consultation.

### **Manage Company > Advanced Options > Restricting Site Access**

Our Technical Support team is available to help you restrict access to your site. [Contact us](#) to schedule a complimentary consultation.

### **Manage Company > Advanced Options > Content Portal**

The Content Portal view of your Brainshark site makes comments, ranking and rating of presentations available to your users, employees, and partners. This section of Administration allows you to control the Comments and Ratings settings.

#### *Comments*

Customize whether or not users who are logged in can comment on presentations in the site. Authors can be given the ability to override this setting.

#### *Ratings*

Customize whether or not users who are logged in can rate presentations in the site. Authors can be given the ability to override this setting.