

Quick Start Guide

For Learners

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Sign In

1. In a browser, navigate to your Percipio sign in page.

Let's	get started!
Email or logi	n name
Next	
Login with	your corporate credentials using SSO

2. Enter your user name and password, this maybe your network or corporate credentials if your organization configured Percipio single sign-on.

Note: Passwords are case-sensitive

3. Select Log in.

Explore the Home Page



Use the Percipio home page to find and access content.

- 1. Logo: Select to access the Percipio home page.
- 2. <u>Library</u>: The library contains all of your available content. This is where you can browse by topic.
- 3. Language selector: Select to change your Percipio site language.
- 4. **My Profile**: Select to access your My Learning, My Settings, Help, Log out.
- 5. Search: Enter keywords or let the auto fill guide you to the learning content you want.
- 6. <u>Role</u>: Select or change your job role to get recommendations on skills needed to advance in that role
- 7. **Recent Learning**: Access the content you've started but not yet completed.
- 8. Live learning: If you are entitled, you can see the schedule of upcoming live courses. Find one and register for it.
- 9. Skill Benchmarks: Skill Benchmarks are a way for you to gauge your proficiency in a particular skill.
- 10. Playlist: View content you've added to your Playlist. Playlists provide a quick and easy way for you to organize content that is of interest to you.
- 11. **Promotion strip:** If your company chooses to, they can add a strip of recommended content.
- 12. <u>Selected Skills</u>: Percipio recommends content based on what you selected for skills and job role. Each skill you selected shows on a different tab.
- 13. **Recommendations for you**: View recommendations based on your Recent activity and see what content is trending across Percipio in Popular Channels. You can also see recommendations for achieving skills associated with your job role and view Top-Rated content, those with the

highest customer ratings. Select it to remove the content you're not interested in.

- 14. <u>Top picks for your role</u>: Gives recommendations based on your assigned/selected job role.
- 15. My Settings: Shows you your user profile information including email and password, as well as notification, leaderboard and language settings.
- 16. My Learning: The home of all of your learning: past, current and upcoming.
- 17. My Achievements: Get insights about your achievements, goals, and other activity you are doing in Percipio.

Role and Skill Ratings

If the setting is enabled by your organization, role and skill ratings allows you to identify and rate your skill level for both skills associated with your job role and other skills you want to develop. You get content recommendations based on your job role and the specific skills that you select.

If you set an aspirational role, you must manage that from the Role Advisor page. The Role and Skill Ratings page only tracks your current role and skills associated with that role.

Role selection

If available on your site and if your administrator has not provided a job role for you, you can specify your job role or a job role you aspire to become from a predefined list of roles. When you specify a role, you see recommendations for learning skills associated with that role on your home page on the Top picks for your role strip and from Percipio home page. From the Role tab in the top section on the Percipio home page, you can access Role Advisor for a full set of recommendations and skill benchmarks. The Role Advisor page can also be found in the left navigation bar.

You can find the full list of job roles, here.

If your role is added by your administrator, you cannot change it. Otherwise, you can change your job role to the next-level job role or a different role at any time.

Add your job role from the Home Page

To add your job role from the home page:

If your administrator did not add one for you, you can add your job role.
 Select the **Role** tab in the top section on the Percipio home page. If you do not see the Role tab, your administrator has this feature disabled.

Assignments	Programs	Role	Recent Learning	Live Learning	Skill Benchmarks	Pla
. •			learning experience			
Role Advisor recommends learning to help you level up, shows you what skills others in your role are building, and highlights new content to keep your skills current.						
	Select a role					

- 2. Select **Select a role** if you never specified a role before, or **Change role** to update your current selection.
- 3. Enter a new job role and select **Save**.

Add or change your job role

To add or change your job role:

- If your administrator did not add one for you, you can add or change your job role. Go to My Learning > Role and Skill Ratings, or select Role Advisor from the left navigation bar.
- 2. Select **Add a role** if you never specified a role before, or **Change role** to update your current selection.

Edit Role	×
Product Manager	
 We use this information to recommend learning to help you: level up your role see skills that others in your role are building stay up to date with new courses, books, and job role journeys 	
Clear selection	
Cancel	Save

- 3. In the **Your role** field, enter your new role. Enter at least three consecutive letters to see available options.
- 4. Select **Save** to save the change. When you go to your Top picks for your role strip, you now see the new role and new recommendations. You can only have one active role at a time.

Remove your job role

Every learning journey is unique and fluid. To support your journey, if you no longer want to receive recommendations based on your job role, you can remove it.

To remove your job role:

 If your administrator did not add one for you, you can remove your job role. Go to My Learning > Role and Skill Ratings, or select Role Advisor from the left navigation bar.

- 2. If you are on the Role and Skill ratings page, select **Change role**. If you are on the Role Advisor page, select **Edit**.
- 3. From the Edit role pop up, select **Clear selection** to remove your current role.
- 4. Select **Save** to save your changes.

Skill selection

For each job role, Skillsoft identified focus skills that people who are successful in that role have. For each skill, we identified content that would help you acquire that skill. Within this structure, we also identified 5 levels of competency for each skill and mapped our content to each level.

Skill Profile

Your role is currently set to: Product Manager

🖌 Change role 🛛 🔆 Visit your Role Advisor page

Skills - Add, update and rate

Rate your skills on a scale from 1 to 5. Your skill profile will personalize your learning recommendations.

Core Product Manager skills



Skills listed for each job role vary, but the rating system for each skill is as follows:

1. Level 1: Novice. You have a fundamental awareness of the skill with limited practical experience. You are able to perform basic tasks with strong guidance.

- 2. Level 2: You have a solid understanding of applying the skill. You can perform basic tasks independently and more advanced tasks with guidance.
- 3. **Level 3:** You have a full understanding of applying the skill. You can perform most tasks with minimal guidance.
- 4. Level 4: You have extensive knowledge of the skill and can apply it independently for all tasks. You can direct the work of others and contribute to their skill development.
- 5. Level 5: Advanced. You are considered a subject matter expert of the skill and can handle complex and unique challenges with ease. You are able to coach and mentor others at all levels.

After you add a job role (or your admin defines one for you), you can see all associated skills. For each skill, you can:

- Add or edit a rating
- Prioritize it for content recommendations
- Explore content associated with it

If you do not see a skill listed that you have or think you need, you can add it to your **Manage other skill ratings** section. When you add a skill to this section, the system will make content recommendations for you.

To add a skill:

- In the Manage other skill ratings section, enter the skill in the Add a skill box.
- 2. Select from the list that best matches the skill you want to add. The skill is added to your list.
- 3. You can now rate the skill or explore associated content.

Add or edit your skill rating

To add or edit a rating:

 If you are adding a rating for the first time, to the left of the skill name, select the +. If you are editing a rating, select the number.



2. Indicate the level you have achieved with the skill by selecting the appropriate dot, Novice level is to the left, Advanced level is to the right.



3. Select Save.

Prioritize skill content recommendations

If you are not interested in receiving content recommendations for a particular skill, you can de-prioritize that skill. To de-prioritize a skill, select the **Actions** menu **i**, and then **Not interested**.

To re-prioritize the skill, select the **Actions** menu **i**, and then **Undo**.

Explore skill content recommendations

To see content associated with the skill and the level you selected, select the **Actions** menu **i**, and then **Explore this skill**. You see a Skill page

recommending content you can use to increase your skill level for your job role. If Percipio can't find specific content based on your criteria for skill, level, and job role, you can follow the link to View all content to see a Search results page that you can sort and filter to identify the most meaningful content for you.

Select Your Skill Interests

The first time you sign into Percipio, you are prompted to select the skills you want to develop. Based on your selections, Percipio shows you personalized recommendations for content available to you in your <u>library</u> that you are likely to find the most interesting and relevant. The content displays in a navigable strip on the home page, making it easier to discover content important to you.

To edit your skill choices

- 1. Select Skill Interests in My Learning from the left navigation bar.
- 2. Choose a skill you want to develop
- 3. Select the rating that best describes your proficiency in that subject.
- 4. Select Save.

Explore the Library

The Percipio Library contains all of the learning assets available to you. These assets are organized into a hierarchy to help you find content quickly and easily. You can explore the library, <u>search</u> for content, and add your favorite assets to your playlist.

Note: You can explore the library in the selected Percipio language only. To see more content offerings you may be entitled to, <u>change your language setting</u>, then explore again.

Explore the Library

To explore the Library:

- 1. From the left navigation bar, select Library.
- 2. From the Library page, you can:
 - ° Use a quick link to jump to a specific type of content
 - ° Select the specific area and then a subject
 - ° Browse available certifications
 - Form the Discover section, explore specific content such as an Aspire Journey, the Bookshelf, CAISY AI simulations, Live learning calendar, and Skill Benchmarks.

Users						
Home						
器 Library	Provide feedback					
See all that ou	ır learning library has to offe	r!				
Quick Links	Live Learning Calendar	Aspire Journeys	Bookshelf	() () ()	Simulati	ons (7) Skill Benchmarks
Company Inc	. skill areas					
Akara New H	ire Orientation	Akara processes	1			Manager Development
Skill Areas						
Artificial Intellige	nce (AI)	Business Operations				Cloud Services
Data		Digital Transformation	n			Diversity, Equity, & Inclusion
Prepare for a	certification					
	erican Society for lity (ASQ)	S AWS		bcs iii:	BCS Pro Institute	fessional
C [*] Institute C++	Institute	Cisco		CompTIA	CompTI	A
Digital Marketing						
) Digi Inst	EC-Countries EC-Co	ell EC-Council		Google	Google	
Discover the l	earning method that's be	est for you!				
	Follow a guided path	e curriculum with				ge in live learning
	Aspire Journeys deliver a comprehensive curriculum w hands-on practice and assessments towards a unique goal.					or with a centralized portal to register for and access
	Aspire Journeys Aspire Journeys for Business Skill	s 🕨				earning Calendar 🕨
	Aspire Journeys for Business Skills Aspire Journeys for Codecademy					ft Leadercamps 🕨
	Aspire Journeys for Leadership					
	Departies comments it in the	CAICY	614ª		Den	a lister of the st
- 1	CAISY makes crucial conversations eas space to practice and receive real-time f	er by providing a safe		Explore	or listen on the go a library of books, audiobooks and summaries. ad the Percipio app and download audiobooks for the	
	Explore CAISY Scenarios	A			road.	e the Bookshelf
						ft's The Edge Podcast 🕨
	Gauge your skill proficiency					
	provide personalized recommendations					
	Visit Role Advisor					

Library page organization

The Library page is organized to help you easily find the content you need. Quick links show first taking you directly to a page showcasing all items of a particular type.

Next you may see is content your organization curated for you. Under that you see Skill Areas. Within each of these categories, you see topic areas. Drilling down into topic areas, you see subjects related to that topic. Going still deeper, within a subject, you see channels, which are very focused groups of content organized by content type.

- **Category:** on the Percipio library page, you see the Skillsoft menu category: Skill Areas. Custom areas and subjects can exist here or in a custom category for your company. If a custom category gets created, it displays above Skill Areas.
 - Custom category: If your admin creates a custom menu category, you see custom areas and subjects specific to your organization in this category.
 - **Skill Areas:** The main category that contains all Skillsoft areas and possibly some custom areas depending on how your admin has configured your library.
- Areas: broad groupings of content that display under the standard or custom categories. Areas are arranged alphabetically in the library under their category.
- **Subject:** topic-level grouping of content that display under an area. Select an area to see its subjects.
- **Channels:** Channels are the core building blocks of the library. A channel further refines the subject into sub-topics of related content presented in an organized way. You cannot complete a channel.

- Journey: Journeys are another of the core building blocks of the library.
 A journey offers a defined learning path of related content presented in an organized way. You can complete a journey.
- **Content:** Content includes courses, videos, books, book summaries, audiobooks, audio summaries, live courses, Skill Benchmarks, Practice Labs, TestPreps, and any custom content your admin adds.

After the Skill Areas section, you see a section for Certifications available to you.

• **Certifications:** Certifications are a unique category within the Library. You can browse certifications from various vendors and select channels focused on presenting targeted content for a particular certification path. You only see certifications in the library if you are entitled to them.

After Certifications, you see a Discover section where you can find the best content type to meet your learning needs.

- Follow a guided path: This block contains:
 - Aspire journeys: Journeys are structured learning paths which provide content to achieve the skills for a specific job role or function. This block displays all Aspire journeys by topic for easy access.
- Engage in live learning: This block contains the Live Learning Calendar, as well as Skillsoft Bootcamps and <u>Leadercamps</u>Leadercamps that display if you are entitled to the content.
- **Practice conversations with CAISY:** This block takes your directly to all AI simulations helping you practice difficult conversations.
- **Read or listen on the go:** This block shows the Bookshelf where you can browse and search for books, audiobooks, and summaries that are entitled to you. You can also find podcasts.

• **Gauge your skill proficiency:** This block targets skills for your role and gaining skill proficiency. Access Skill Benchmarks or your Role advisor page.

The last section on the Library page, Browse full collections, showcases content contained in a specific collection to which you are entitled. It helps you easily see what is popular and newly added to the site.

Search for Content

Use Percipio search to quickly find content, such as courses, videos, books, skill benchmarks, channels and journeys. Percipio uses an intelligent search engine that displays suggested search queries as you enter text into the search field to help you quickly narrow your search.

If AI-assisted search is enabled on your site, you might see an AI-assisted response and related search terms if your query is supported by AI-assisted search.

From the initial search results, you can further filter or scroll to see top matches. As you scan the top matches, you see specific content item details.

Filter by		2,527 results for "excel"	Sort by: Best Mat
Type Article Aspire Journey	- 29 2		CHANNEL $ e 4 (2) $ Excel Excel is the powerful spreadsheet component of Microsoft Office. Discover Excel and its many uses.
 Audio Summary Audiobook Book Book Summary Channel 	5 11 402 6 5		CHANNEL \blacktriangleright CHANNEL CH
☐ Course ☐ Lab ☐ Lesson Show More ✓ Subject	223 10 2 +		COURSE $ ightarrow 4.4 (4248)$ Getting started in Excel 365 Excel Microsoft 365 (2021) Excel 365 is the spreadsheet application in the Microsoft 365 suite. In this course, you will explore how to find and open the Excel 365 application, 41m Skillsoft Beginner Jun 2021 From Channel: Excel TOSA Excel
Content Source	+	Excel 365	BOOK Microsoft Excel 365 Bible Your personal, hands-on guide to the latest and most useful features in Microsoft Excel 365 Excel 365 is Microsoft's latest cloud-based version
Duration	+		15h 4m Skillsoft Everyone Mar 2022 by Michael Alexander, Dick Kusleika From Channel: <u>Excel</u> Best Chapter Match: <u>Introducing Excel</u>
Training Credits Subtitles/CC ()	+		COURSE $ ightarrow 4.5 (2081)$ Adding & arranging data in Excel 365
			Excel Microsoft 365 (2021) In Excel 365, it is easy to add new content to workbooks and change how values are arranged. This course demonstrates how to add and manage 44m 43s Skillsoft Beginner Jun 2021 From Channel: <u>Excel TOSA Excel</u>

Depending on the type of item, you might see:

- New: Indicates that the content item was added in the last three months.
- **Content type**: Located above the title, this indicates the type of item such as course, video, book, etc
- **Status**: Located to the right of content type, this indicates whether you started or completed the item previously. If nothing shows, you have not yet accessed the item.

- Action icons: Located to the right of status, these allow you to share the item with colleagues, rate, or save the item to your playlist.
- Title: Indicated by bold text, this shows the title of the item.
- **Description**: Located below the title and technology version, indicates what you can expect to learn from the content item.
- **Duration**: Located below the description when applicable, this shows the estimated time needed to complete the item in hours, minutes, and seconds.
- by: Located below the description when applicable, this shows the name of the author or instructor. You can select the name to view results for all of the content available by the author or instructor. After selecting the author or instructor, the search box displays Author:[author name];.
 You can append additional search terms following the semicolon in order to search for that term within the results for that author/instructor.
- **Technology title and version**: Located below the title when applicable, indicates the specific technology, such as Excel, and the technology version, such as Microsoft 365, that this item covers.
- **Content source**: Located to the right of duration in the content card when applicable, this indicates where the content comes from such as, Skillsoft, a partner, vendor, or custom content specification. Custom content added by your organization that meets your search criteria, displays under the Content source value specified in the Organization name.
- **Expertise level**: Located to the right of content source, this indicates the level of content contained in the item such as, for everyone, beginner, intermediate or expert.
- **Published date**: Located to the right of expertise level, this indicates when the item was published in Percipio or for books, the actual pub-

lisher's publish date. Skillsoft does not update the date when content is republished.

- If an item in the search results is:
 - part of a course, the **From Course** field links back to the associated course.
 - part of a channel, the **From Channel** field links back to the associated channel(s).
 - part of a journey, the **From Journey** field links back to the associated channel(s).
 - part of a career journey, to which the learner is entitled, the
 From Career Journey field links back to the associated
 Career Journey.
 - a book, the **Best Chapter match** field links directly to a chapter in the book that best matches your search terms.

The Percipio Search returns 20 results per page. To see additional results, click **Show More** at the bottom of the Search results page.

To search for content

1. In the top search bar, enter your search term.



2. Select \bigcirc or press **Enter**. The search results display.

Refine your search results

Use filters to refine your search results. These may vary based on the content returned in the original search results, filters selected, and the Search filter settings configured by your organization's administrators.

- Sort by: select Best Match to view the closest results based on your entered search terms, or use Newest to see the most recently-released content that matches your entered search terms.
- **Type:** provides all asset types available that match your search terms. Select the types of content for how you want to learn. The most commonly searched for content types are types pinned to the top of the list.
- **Ratings:** Use these filters to limit the results to content that has the selected rating. Content with that has not yet been rated is excluded from the search results.
- **Duration:** provides various search options for time to complete the content.

Note: The Duration filter is not available in ELSA.

- Language: only displays when the search results contain more than one language in the results. Use this filter to limit the results to the selected language.
- **Subject:** allows the learner to filter results by the Library subject(s) to which the content belongs. This can help learners narrow in on the topics they are targeting.
- **Content Source:** provides the vendor or provider who created and maintains the content. When your organization has added custom content items, custom journeys, live courses, and dynamic content, you can filter the Content source to the value defined in the Organization name.
- Expertise: provides various search options for level of knowledge.

Note: Books are tagged as **Everyone** and are only included in filtered Expertise results if you select **Everyone** as one of your filters. Channels do not have an explicit Expertise level, and are included in filtered results regardless of the Expertise filter selection.

- Training Credits: provides the option to search by training certifications.
- Subtitles/CC: when turned on, allows learners to see content in search results that have subtitles or closed captions. This is also important for users who are searching English courses and are looking for courses with subtitles that are translated into other languages.

To use filters

You can select multiple filters to narrow your search results.

The selected search filters display on the left of the Search page and the search results update with each selection.

Note: When using the filters, the counts update to reflect the new filtered results. If all of the selections are filtered out, the filter value is removed from the list. To get it back, unselect filters.

The filter options vary based on the content returned in the original search results.

Example: If you search for Java, then select **Course** from the **Type** filter, you will notice that **Codecademy** and **Cybervista** disappear from the **Content Source** filter. This happens because there are no Java courses for those sources. If you unselect **Course** from the **Type** filter, **Codecademy** and **Cybervista**re-appear under the **Content Source** filter.

Add Content to the Playlist

Playlists provide a quick and easy way for you to save content that is of interest so you can it take at a later time. By default everyone has a Save for later playlist where they can add items. Your organization may choose to offer you the option to create multiple playlists so you can organize and categorize your content into different playlists. With multiple playlists you have more control to create, edit, remove, and share them.

You can add content to your Playlist from almost anywhere in Percipio, including the home page, your <u>search results</u>, the <u>library</u>, and when accessing the content itself.

- From any content card, select the Actions menu . Select:
 - **Playlist add/remove:** This allows you to put the item in an existing playlist or a new playlist that you can create.
- To **access** your Playlist, select **My Learning** from the left navigation bar, then select **Playlists**.



Learning Goals

If your Percipio site administrators have the learning goals feature turned on, you can use Percipio to help you sustain a growth mindset through weekly learning in the following ways:

- Set weekly goals: learners can set a weekly goal to reflect the time they want to invest in learning.
- Track goal progress: learners can track the progress made against their weekly goal.
- Get learning reminders: learners can opt to receive reminders to help stay on track
- Schedule time: learners can schedule an appointment in their calendar to learn

Set a learning goal

Get started by determining how many minutes you want to commit to learning each week. Then specify it:

- You can set a learning goal when you first start using Percipio. Or, if you're already using Percipio, select My Learning from the left navigation bar, then choose My Achievements.
- 2. From the My Achievements page, find the box that says **Set Your Learning Goal**, then select **Set goal**. If you previously set a goal and you want to change it, you will see **Change goal** in the box with your goal progress.

From the mobile app, select Set a learning goal:



- Choose one of the following options for your weekly goal: 15, 30, 45, or
 60 minutes. A learning week in Percipio starts on Monday and ends on Sunday.
- 4. Select Save and continue.
- 5. Select one or more days and a time that is best for you to learn regularly.
- Select Add to calendar and choose the calendar software where the event displays. Your options are Google (online), Microsoft Outlook, or Apple Calendar.
- 7. Open the downloaded calender item and save it to your calendar.

Track goal progress

After you set your goal, Percipio tracks your progress. You can view your progress from My Achievements.

Content that is tracked for your goal includes: courses, videos, books, audio books, book summaries, audio summaries, Skillsoft bootcamps and leadercamps, labs, TestPreps, custom MP3 and MP4, and Wintellect. It also includes time spent in Skillsoft course knowledge checks and course tests.

Some content cannot be tracked against a goal because Percipio can't track its duration. This mostly occurs for items that are linked outside of Percipio and custom live courses (instructor-led training). If you launch an item that Percipio can't track, Percipio displays a message telling you that consuming this content won't count toward your weekly learning goal.

Learning streak

If you complete your learning goal for more than one week in a row, you're on a learning streak. You stop your streak if there is a week where you don't achieve your goal. You can see your current and best streak from My Achievements.

From the web:



From the mobile app:



Reminders

When you set a learning goal, reminders can help you complete your goal each week. To get reminders, allow notifications for Percipio in the mobile app. The reminders appear on Thursdays if you haven't completed your weekly learning goal yet.

Schedule time

Learners can schedule learning time on their calendar to complete their weekly learning goal. To schedule time:

- Select My Learning from the left navigation bar, then choose My Achievements. From the My Achievements page, find the box that says Set Your Learning Goal, select Set goal. If you have previously set a goal and you want to change it, you will see Change goal in the box with your goal progress.
- Choose one of the following options for your weekly goal: 15, 30, 45, or
 60 minutes.
- 3. Select Save and continue.
- 4. Select the desired days and time.
- Select Add to calendar and choose the calendar software where the event displays. Your options are Google (online), Microsoft Outlook, or Apple Calendar.
- 6. Open the calender item and save it to your calendar.