

Onspring Web Training is an on-demand learning solution for admin users, giving you access to instructional videos and downloadable guides from the comfort of your desk. We update our Web Training resources with every release, so you'll always be informed and ready to employ new features.

Web Training Highlights

- Web Training is for administrative users who will be configuring the Onspring platform for your organization.
- The program will guide you through Onspring platform functionality so you know how to configure apps, reports, dashboards, messaging, users, surveys, automation functions, and more.
- Web Training content is available through the **Onspring Community** (community.onspring.com). Your Client Success Manager will create your initial user accounts, and you can use the Access Requests form on the site to request logins for individual team members.
- Web Training resources include video training sessions, downloadable guides, solution documentation, and searchable online help.



Web Training Learning Modules

Navigating & Working in Onspring

Take a tour of the Onspring user interface. Learn how to manage your user profile, and explore dashboards, reports and content records from the left-hand menu.

Apps & Field Types

Learn about the structure and purpose of apps and the field types you can use to capture data. Understand how to manage app properties, create and edit fields, and design app layouts for end users.

Data Relationships (Reference Fields)

Understand how to define relationships between records. Learn best practices for reference fields, and see how content in one app can be used in another.

Data Import

Understand how to import data into Onspring on an ad-hoc basis. See how to set up your data file and load it into your target app. Also learn troubleshooting techniques.

Users & Access

Learn how to add users and organize them into groups. Also explore roles for granting access to content and administrative functions.

Reports & Charts

Learn how to build live reports to display information in text or chart format. Understand report filters, scheduled reports, export options, and temporary report creation.

Dashboards

Learn how to group reports, key metrics, and action items onto dashboards to give users quick access to the data and functions they need.

Portals

Learn about Onspring's Portal feature; a branded, dashboard-driven experience for both internal and external users. Understand use cases, how to configure portals, and best practices.

Formulas

Understand how to auto-calculate field values, such as statuses, ratings and due dates. Explore the Onspring formula builder and step through a variety of use cases, including cross-app calculations.

Triggers & Outcomes

Learn how to automate functions in Onspring based on logical rules. Discover how to auto-set field values, dynamically alter app layouts, generate documents, auto-create records and more.

Messaging

Discover how to inform users via email and text message when content changes or assignments require attention. Also see how to configure date-based reminders.

Workflow

Understand the workflow builder for gathering input, review and approval for app and survey records. Learn how to configure stages with assigned reviewers and automated emails.

Surveys

Learn how to configure surveys to collect data from internal or external parties. Understand question types, branching, scoring, campaigns, and reporting.

Dynamic Documents

Learn how to auto-generate documents such as audit reports, BCDR plans, policies, and more. See how to pull values from records into a polished, branded deliverable.

Instance Packaging

See how you can move configurations between instances. Learn how to define package components, select import actions, and run the packaging process.

System Information

Understand all the settings available for your entire Onspring system. These settings include choosing a color palette, a default time zone, whether to enforce a password reset, and designating which users should receive Onspring communications.

Questions about the Onspring Web Training program? Please email training@onspring.com.