

Onspring

PEOPLE-POWERED AUTOMATION

Web Training

Program Overview

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

Web Training Highlights

- Web training is for admin 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.
- The Web Training site (webtraining.onspring.com) is available to anyone on your team. Please use the Access Requests form on the site to request logins for individual team members.
- The Web Training site provides video training sessions, downloadable guides, solution documentation and searchable online help.



Web Training Learning Modules

Onspring Navigation

Take a tour of the Onspring user interface. Learn how to manage your active role, 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 fields 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.

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 onto dashboards to give users access to the data and functions they need. Also learn how to bundle dashboards into containers.

Surveys

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

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.

Email Messaging

Discover how to inform users via email when content changes or assignments require their attention. Also see how to configure reminders based on date values.

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.

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.

Visual Workflow

Understand the visual workflow builder for managing content review and approval. Learn how to configure stages with assigned reviewers and automated emails.

Instance Packaging

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

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