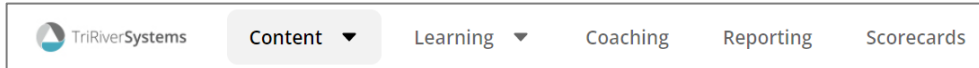


# Brainshark Roles and Privileges

**Introduction** In Brainshark, roles are assigned to users registered in the company’s site granting them access to one or more of the applications (Content, Learning, Coaching and Scorecards).



A user can be assigned multiple roles in one or more applications in the site. When the role is assigned, the user automatically inherits the privileges of that role.

**Brainshark Roles** This document addresses each Brainshark application and the roles and privileges related to each one.

(Click the application name or matrix to advance to that section)

Application	Roles	Roles & Privileges Matrix
Content	Viewer Author Folder Administrator Company Administrator	<a href="#">Content Matrix</a>
Learning	Student Learning Author Group Manager Learning Manager Learning Administrator	<a href="#">Learning Matrix</a>
Coaching	Activity Creator Head Coach Activity Participant Activity Reviewer	<a href="#">Coaching Matrix</a>

Brainshark  
Roles,  
continued

Application	Roles	Roles & Privileges Matrix
Scorecards	User Author Manager Group Manager Head Coach Learning Manager Learning Administrator Company Administrator	<u>Scorecard Matrix</u>

## Content Matrix

**Introduction** The Content application has four (4) roles. The same person can be assigned multiple roles in the Content application or other applications. The roles are defined below and the [matrix](#) on the following page shows default privileges held by each role.

### Roles

Role	Description
Viewer	Although Brainshark content can be sent out and viewed by anyone with internet access, a Brainshark Viewer is a registered site user who has been given a username and password, so they are able to view content that requires a login.
Author	A Brainshark Author is a registered user who can view and create content, distribute new and existing content, and generate reports on self-created content.
Folder Administrator	A Brainshark Folder Administrator has limited administrative privileges. They can modify/rename their folders and descriptions, manage which users have access to their folders, and create additional subfolders. They can also be given additional privileges (via a site level setting) to manage the presentations that are in their folders. These include changing the author, modifying settings, deactivating/deleting, and editing the presentation. Folder Administrators access this functionality via the Administration link. A Folder Administrator can also run reports on all content within the folders that they manage. Folder Administrators cannot configure global settings, including the creation and deletion of users and groups.

Roles,  
continued

Role	Description
Company Administrator	Within a Brainshark site, the Company Administrator oversees the setup of the site and maintains the aspects of the site that relate to how all users interface with it and its content. This person is a resource for internal users and is responsible with adding, deleting, and granting privileges to users, adding deleting, and establishing settings for groups, adding, deleting, and setting permissions for folders, as well as reporting.

## Content Matrix

**Introduction** When a Content role is assigned, the user automatically inherits the privileges of that role. Depending on the privileges needed, users may be assigned more than one role.

PRIVILEGES <sup>(1)</sup>	ROLES			
	VIEWER	AUTHOR	FOLDER ADMINISTRATOR <sup>(2)</sup>	COMPANY ADMINISTRATOR <sup>(3)</sup>
View Presentations that require a login	X (requires folder viewing privileges)	X	X	X
Create new presentation		X		
Edit presentations		X	X (site-level setting must be enabled)	X
Archive presentations		X		X
Run presentation reports		X (their content only)	X (only content in their designated folders)	X
Add Users to folders			X	X
Create folders				X
Modify / rename folders			X	X
Add subfolders			X	X
Approve content			X	X
Create groups				X
Access all global setting under Manage Company				X
Add Users				X
Edit Users				X
Delete Users				X
Inactivate Users				X
Add users to groups				X
Change presentation author			X (site-level setting must be enabled)	X
<p><sup>(1)</sup> Additional privileges can be granted to each role by the Company Administrator by accessing: Administration &gt; Manage Users &gt; Action &gt; Edit Profile</p> <p><sup>(2)</sup> Folder Administrators can also be given additional privileges (via a company level setting) to manage the presentations that are in their folders. These include changing author, modifying settings, deactivating/deleting, and editing the presentation.</p> <p><sup>(3)</sup> Company Administrators may create presentations when they also have Author privileges. They can also perform certain functions in Brainshark Learning, including enroll students, edit course, send reminders, as well as manage folder, users, groups and content.</p>				

## Learning

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**Introduction** The Brainshark Learning application has five (5) roles. The same person can be assigned multiple roles in Learning and/or other applications. The roles are defined below and the [matrix](#) on the following page shows default privileges held by each role.

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### Roles

Role	Description
Student	A Student is an individual enrolled to take learning courses in Brainshark. They can print or save certificates of completion and generate a report on their own transcript. A Student does not have access to any other reports. Students may also self-enroll in courses that are available as open enrollment in the Course Catalog. They can run a Student Transcript Report.
Learning Author	<p>A Learning (Course) Author may define/create, archive, inactivate and/or expire their Brainshark courses and curriculums. A Learning Author establishes completion criteria, enrolls students, and groups, schedules and sends email reminders, and generates reports to track student enrollment, progress, and results. They can run reports on their own content.</p> <p>Learning Authors who need to create courses that are coaching activities must also be designated as an Activity Creator and/or Head Coach in their user profile.</p>

## Learning

Roles,  
continued

Role	Description
Group Manager	<p>A Group Manager is an individual who requires the ability to track and report on the progress of their group or team members. They can enroll their group or individual members in open and limited enrollment courses and curriculum from the Course Catalog. Their reporting access is limited access to the Enrollment Report for Group Managers that shows completion and enrollment statuses for their group. Group Managers may request to receive system-generated emails with copies of their group's completion certificates. When the Enhanced Group Management functionality is enabled in the site, Group Managers can also add or remove existing users/students/members from their groups. Group Managers can add new users/students/members to the Brainshark site and add them to their group, if enabled by the Company Administrator. If the Group Management Deactivation feature enabled in the site, the Group Manager can also remove a user/student/member from their group and inactivate the member's access to Brainshark.</p>
Learning Manager	<p>The Learning Manager has limited administrative privileges for managing Students and Groups. They can add and edit student profiles and assign Learning Authors and/or Learning Manager privileges. A Learning Manager can also create, edit, and remove groups and assign group membership, verify student course enrollments, enroll students in new courses, set student's status complete, and generate reports.</p>

## Learning

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**Roles,**  
continued

Role	Description
Learning Administrator	The Learning Administrator has the same privileges as the Learning Manager with the added ability to configure the site's overall learning settings. They are responsible for customizing the default email templates used for enrollments and reminders, defining the content types for any non-Brainshark courses, and managing the Learning Topics used in the Course Catalog. The Learning Administrator has access to all the learning content to enroll students/groups and send email invitations. Learning Administrators may change or reassign the author of an existing course, edit, inactivate or expire any course provided the Company Administrator has requested Brainshark Support "Enable Learning Admins to Edit Courses" setting. They also have full Student and Group Management privileges to create, edit, inactivate, and delete users and/or groups; and assign privileges to establish individuals as a Learning Author, Learning Manager and or Group Manager. For course access and creation, they assign privileges to individual Students or Groups to folders created by the site's Company Administrator.

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## Learning Matrix

**Introduction** All Brainshark Learning Roles require individuals to be registered and authenticated with Brainshark to access Learning. When the individual's registration profile is created, and their role(s) assigned, they automatically inherit the privileges of the role(s).

Privileges	ROLES					
	Student	Learning Author	Learning Manager	Group Manager	Learning Administrator	Company Administrator
Add Users / Students			X	X <sup>(1)</sup>	X	X
Edit Users / Students			X		X	X
Delete Users / Students					X	X
Inactivate Users / Students				X <sup>(2)</sup>	X	X
Create Groups					X	X
Add User / Student to Group			X	X <sup>(1)</sup>	X	X
Remove User/ Student from Group			X	X <sup>(1)</sup>	X	X
Edit Group			X	X <sup>(1)</sup>	X	X
Delete Groups			X		X	X
Create Course		X				
Edit Course(s)		X (only their content)			X <sup>(3)</sup> (or must be Course Author)	X
Expire Course(s)		X (only their content)			X <sup>(3)</sup> (or must be Course Author)	X (Administration / Manage Content)
Inactivate Course(s)		X (only their content)			X <sup>(3)</sup> (or must be Course Author)	X (Administration / Manage Content)
Archive Course(s)		X (only their content)			X <sup>(3)</sup> (or must be Course Author)	
Enroll Students / Groups		X	X	X	X	X
Send Course Invitations and Reminders		X			X	X
View Course that require a login	X	X	X	X	X	X
Generate Brainshark Learning Reports	X (only their transcript)	X	X	X (limited – Group Manager Enrollment Report)	X	X
Change Course Learning Author					X <sup>(3)</sup> (Administration / Manage Content)	X (Administration / Manage Content)
Create / Modify Folders and Access			X (requires Folder Administrative Privileges)		X (requires Folder Administrative Privileges)	X
Access all Brainshark Learning Settings					X	X

(1) *Enhanced Group Management feature – requires site activation*  
(2) *Group Management Deactivation feature – requires site activation*  
(3) *Enable Learning Admins to Edit Courses feature – requires site activation*

**Note:** Learning Authors who need to create courses that are coaching activities must also be designated as an Activity Creator and/or Head Coach in their user profile

## Coaching

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**Introduction** Coaching is a great way for people to improve their skills through practice, reinforcement, and feedback. It is also a way to assess and reinforce skills and preparedness, certifying that participants can clearly communicate and demonstrate your company's goals, strategies, products, services and more. Whether it's just for practice or about capturing the best examples to foster peer learning and improve organizational performance, coaching activities ensure everyone is confident and prepared.

Please note that the terms "coaching activity" and "coaching challenge" are used interchangeably.

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**Roles** Coaching has four (4) roles. The same person be assigned multiple roles in Coaching or other applications. The roles and best practices are defined below. The [matrix](#) shows default privileges for each.

- [Activity Creator](#)
  - [Head Coach](#)
  - [Activity Participant](#)
  - [Activity Reviewer](#)
-

## Coaching

### Activity Creator

An Activity Creator can create an activity and edit, copy, or delete an activity they created. They invite users (individuals or groups) to participate and designate reviewers. They can send reminders to both participants and reviewers. An Activity Creator is automatically added as a reviewer when creating the activity, but they have the option to remove themselves as a reviewer. They can save activities such as Brainshark content.

### Best Practices

Recommended best practices:

Topic	Description
Reminders	Set activity reminders to ensure participants complete the activity on time. Set reviewer reminders so that participants' submissions are reviewed in a timely fashion. Reminders are only sent when a video hasn't been submitted or reviewed by someone.
Rubrics	For activities that will be scored, create a rubric to establish guidelines around rating and responding to each criterion. Rubrics help ensure consistent feedback and quantifies what would be a 10-star or 7-star rating, for example. They provide guidance to participants who need to try again to improve their score and demonstrate how to reward the best submissions with higher scores.

	A	B	C	D	E	F	G
1	<b>Example Ratings Guide - for Reviewers</b>						
2		<b>Participant Feedback</b>					
3	<b>Category</b>	<b>Description</b>	<b>1 Star</b>	<b>2 Stars</b>	<b>3 Stars</b>	<b>4 Stars</b>	<b>5 Stars</b>
4	<b>Knowledge</b>	The presenter has a demonstrable grasp of the content tested	No handle on the material - study the content again	Too many incorrect and/or missing elements of the material - review the content	Please take another look at the material to improve your grasp of it	Very good grasp of the material - minor points can be improved	Excellent Grasp of the material
5	<b>Content</b>	The presenter is using visuals and a script that is clear, concise and of high quality	Not acceptable quality!	Too long and repetitive and therefore not clear.	Okay but not great. Needs to be tightened up	Very good length of presentation - might be a little tighter	Excellent - brief and to the point
6	<b>Flow</b>	The presentation make sense in the order presented and is easy to follow	Too confusing and meandering. Lacks structure and definition of the path	Needs better structure to be effective. Think about the viewers experience when ordering content	Good overall but could benefit from a rework of a few items to flow better	Very good flow, could benefit from a tighter connection between items	Excellent - makes perfect sense. Good framework and follow through
7	<b>Presentation</b>	The presenter demonstrates confidence, professionalism, good eye contact, good tone and smooth overall delivery	Too many pauses and vocal hiccups. Showed some lack of mastery of material and overall lack of confidence	Starting to see it - needs quite a bit more rehearsal to demonstrate confidence and smoothness of delivery	Good, but could benefit from a bit more practice and mastery of the content so that it is delivered more professionally	Well done. Remember to maintain a feeling of confidence when speaking so that the viewer believes that you believe what you are saying	Excellent presentation. Well delivered, clear demonstration of mastery and confidence of the material
8	<b>Accuracy</b>	The content is factually correct, accurately represents products and services and leaves nothing out.	Review all the material again, too many errors and omissions	Beginning to master the content but still not completely accurate. Review and rehearse some more.	Good but there are a couple items that need to be reviewed for accuracy and fixed	Very good job. A couple minor oversights that would be helpful to review	Excellent, thorough presentation of this material
9	<b>Value</b>	The presentation clearly shows the value obtained or risk avoided	Spend some time understanding the value this brings to customers and rehearse it	A couple key value/ benefit and risk statement left out of the presentation. Review the full benefit/risk information and practice delivery.	Good job. Still missing a couple very helpful elements of benefit/risk data. Review the info and try again	Very good grasp of benefits/risks. Could benefit from some additional practice at positioning them in the most effective manner	Excellent grasp of the benefits and risks. Well positioned with the customer and compelling in nature.

## Coaching

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**Head Coach/ Challenge Administrator** A designated Head Coach has the same privileges as an Activity Creator plus the additional privileges to edit, copy or delete an activity created by any Activity Creator. A Head Coach can see all participant's submissions, scores and feedback left by reviewers and provide feedback if the Activity Creator assigns them as a reviewer.

**Note:** Peer reviews are only visible to the participant.

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**Best Practices** Recommended best practices are the same as an Activity Creator.

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**Activity Participant** An Activity Participant is someone who received an invitation to complete a Coaching Activity. Their Activity Dashboard will display all of the activities they are to complete or have completed. If the setting is enabled, Participants can also view the Activity Leaderboard and leave peer feedback.

**Best Practices** Recommended best practices:

Topic	Description
Video Submission	<ul style="list-style-type: none"> <li>Record in a quiet space</li> <li>Use a built-in camera</li> <li>Clear area/desk of clutter</li> <li>Maintain eye contact</li> <li>Keep responses brief</li> </ul>
Practice Takes	The ability to practice is one of the key benefits of using coaching. Record multiple takes until you've perfected your pitch. (Only you can see them.)
Share Takes	Share your best take with colleagues to get their feedback before submitting your entry for review.

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## Coaching

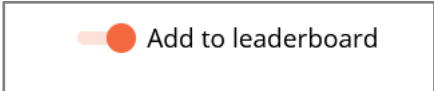
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### Activity Reviewer

The Activity Creator adds the Activity Reviewer(s) when the Activity is being created. They can watch, rate, and submit feedback for each submission. An Activity Reviewer can also view the leaderboard and send participant reminder emails.

### Best Practices

Recommended best practices:

Topic	Description
Timely Review	We recommend reviewing videos within 48 hours of submission.
Feedback	When reviewing submissions, always provide positive and consistent feedback for all categories. (Refer to Rubric for guidance.)
Overall Evaluation	Provide specific details to substantiate your evaluation, and if trying again would improve the participant's submission, recommend it in your evaluation.
Hide Submission from Leaderboard	<p>If the activity has a Leaderboard enabled and the submission receives a low score, you may want to toggle to the left for "Add to leaderboard".</p> <div style="text-align: center;">  </div>

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## Coaching Matrix

**Introduction** When the Coaching role is assigned, the user automatically inherits the privileges of that role. The same person can be assigned multiple roles in Coaching or other applications.

Privileges	Roles			
	Activity Creator	Activity Participant	Activity Reviewer	Head Coach
Create an Activity	X			X
Edit an Activity	X			X
Copy an Activity	X			X
Delete an Activity	X			X
Edit Activities by <u>any</u> creator				X
Review and comment on an Activity	X		X	X **
Take an Activity	X	X	X	X
View leaderboard *	X	X	X	X
Allow peer feedback*	X	X	X	X
Set reviewers	X			X
Send participant reminders	X			X
Send reviewer reminders	X			X
Save as Brainshark Content	X			X
* If the setting is enabled per activity.				
** If Head Coach is listed as reviewer				

**Note:** If an Activity Creator or Head Coach wants to create a course that is a coaching activity, they must also be designated as a Learning Author in their user profile.

## Scorecards

**Introduction** All Brainshark users have access to Scorecards when enabled by the Company Administrator. Each individual's access and Scorecard data is determined by their assigned role. The same person can be assigned multiple roles. The roles and access privileges are defined below and the [matrix](#) shows Scorecard access for each role.

### Roles

Role	Description
User	<b>Home tab:</b> displays your Learning and Coaching data and progress.
Author/ Learning Author	<p><b>Home tab:</b> displays your Learning and Coaching data and progress.</p> <p><b>Activities tab (Courses, Curriculums, Coaching and Presentations):</b> access to the courses, curriculums, and coaching activities and presentations you authored.</p> <p><b>Snapshots tab:</b> lists all saved and scheduled panel Scorecard Snapshots.</p> <p>Note: If an author has not created any content, their default access will be the same as a "User". Once they create content, their access automatically changes to that of the "Author".</p>
Coaching Activity Creator	<p><b>Home tab:</b> displays your Learning and Coaching data and progress.</p> <p><b>Activities tab (Courses/Coaching Activities):</b> access to the coaching courses or stand-alone coaching activities you created.</p>
Folder Administrator	<p><b>Home tab:</b> displays your Learning and Coaching data and progress.</p> <p><b>Activities tab (Presentations):</b> displays the data within folders where you have administrative permissions.</p>

## Scorecards, Continued

Roles,  
continued

Role	Description
Head Coaches	<p><b>Home tab:</b> displays your Learning and Coaching data and progress.</p> <p><b>Teams tab:</b> select Coaches to access all Coaching Insight information.</p> <p><b>Activities tab (Coaching):</b> lists all Coaching Activities.</p>
Manager/ Group Manager	<p><b>Home tab:</b> displays your teams Learning and Coaching data and progress by type (curriculums, courses, and coaching activities) and status.</p> <p><b>Teams tab:</b> access to Management Hierarchy, Groups and Users to view your team's data and progress.</p> <p><b>Snapshots tab:</b> lists all saved and scheduled panel Scorecard Snapshots.</p>
Learning Manager	<p><b>Home tab:</b> displays all Learning and Coaching data and progress by type (curriculums, courses, and coaching activities) and status.</p> <p><b>Teams tab:</b> access to Management Hierarchy, Groups and Users to view your team's data and progress.</p> <p><b>Activities tab:</b> lists all created content by category (Curriculums, Courses, Coaching and Presentations).</p> <p><b>Snapshots tab:</b> lists all saved and scheduled panel Scorecard Snapshots.</p>



## Scorecards, Continued

Roles,  
continued

Role	Description
Learning Administrator	<p><b>Home tab:</b> displays all Learning and Coaching data and progress by type (curriculums, courses, and coaching activities) and status.</p> <p><b>Teams tab:</b> access to Management Hierarchy, Groups and Users to view your team's data and progress.</p> <p><b>Activities tab:</b> lists all created content by category (Curriculums, Courses, Coaching and Presentations).</p> <p><b>Snapshots tab:</b> lists all saved and scheduled panel Scorecard Snapshots.</p>
Company Administrator	<p><b>Home tab:</b> displays all Learning and Coaching data and progress by type (curriculums, courses, and coaching activities) and status.</p> <p><b>Teams tab:</b> access to Management Hierarchy, Groups, Users and Coaches to view your team's data and progress.</p> <p><b>Activities tab:</b> lists all created content by category (Curriculums, Courses, Coaching and Presentations).</p> <p><b>Snapshots tab:</b> lists all saved and scheduled panel Scorecard Snapshots.</p>

## Scorecards Matrix

**Introduction** All Brainshark Scorecard Roles require individuals to be registered and authenticated with Brainshark to access Scorecards. When the individual's registration profile is created and their role(s) assigned, they automatically inherit the privileges of the role(s). Individuals can be assigned multiple roles.

Privileges	ROLES									
	User*	Author* (1)	Learning Author* (1)	Folder Administrator* (2)	Group Manager/ Manager (3)	Coaching Activity Creator *(4)	Head Coach (4)	Learning Manager	Learning Administrator	Company Administrator
<b>Scorecard Tab (Access)</b>										
Home	X	X	X	X	X	X	X	X	X	X
Teams					X		X	X	X	X
o Management Hierarchy					X			X	X	X
o Groups					X			X	X	X
o Users					X			X	X	X
o Coaches							X			X
Activities		X	X	X			X	X	X	X
o Curriculums			X					X	X	X
o Courses			X					X	X	X
o Coaching			X			X	X	X	X	X
o Presentations		X	X	X				X	X	X
Snapshots			X		X			X	X	X
<b>Modify Layouts</b>										
o Home	X	X	X	X	X	X	X	X	X	X
o Team					X		X	X	X	X
o Activities		X	X	X		X	X	X	X	X
<b>Save Layouts</b>										
o Home								X	X	X
o Team								X	X	X
o Activities								X	X	X
<p>* These roles display the user's information on the Home tab.</p> <p>(1) If an author has not created any content their default access will be the same as a user. Once they create content their access automatically changes to "Author" or "Learning Author". All Authors can only see their content.</p> <p>(2) Folder Administrators see presentation/activity data within folder where they have assigned administrative permissions.</p> <p>(3) Group Manager and Managers only see the data for individuals that report to them.</p> <p>(4) If an Activity Creator or Head Coach wants to create a course that is a coaching activity, they must also be designated as a Learning Author in their user profile.</p> <p>Note: Snapshots are a picture of the scorecard panel and are accessed and managed on the Snapshots tab.</p>										

### Help & Support

If you have questions or need assistance, please contact [Brainshark Support](#).

Email: [support@brainshark.com](mailto:support@brainshark.com)  
Phone: 781.370.8222