



Managing Multiple Programs in PowerFTO

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A Few Things to Note:

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After this session, you will be able to:

- Add a new Program in PowerFTO.
- Navigate to different programs in PowerFTO.
- Designate Users as Program Coordinators in PowerFTO.
- Review setting options available for program coordinators in PowerFTO.



Adding a new Program in PowerFTO?

1. Choose a [New Program to add](#).
2. Decide to [use template or create from scratch](#).
3. [Elect Program Coordinators](#) for new program.
4. [Decide on program setting adjustments](#) (I.E., performance categories, forms, etc.)



Permission Roles



Site Administrator

Full access to program

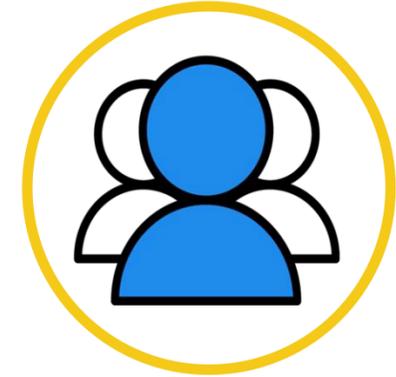
Only users with full access to all programs and features



Program Coordinator

Complete Program Control

Can manage specific programs and add users to program.



Supervisor

Can access forms in that stage

Can access forms in that stage.

Permission Roles



Trainers

Access to forms in that stage.

Users will have access only over their trainees.



Trainees

Anyone in a program selected as trainee

Assigned content from the trainer to complete



Adding/Customizing Performance Categories

Program Coordinators and Site Admins can [add/customize a Performance category](#) – Program Settings>Performance>Add Performance Category

- The ratings tab will let you adjust the numerical rating for all categories.
- Headings can be added to group your performance categories.
- You can re-order by left clicking the ten-dot menu and dragging/dropping in place.

The screenshot shows a software interface with a modal dialog box titled "Add Performance Category". The dialog box has a close button (X) in the top right corner. It contains the following fields and options:

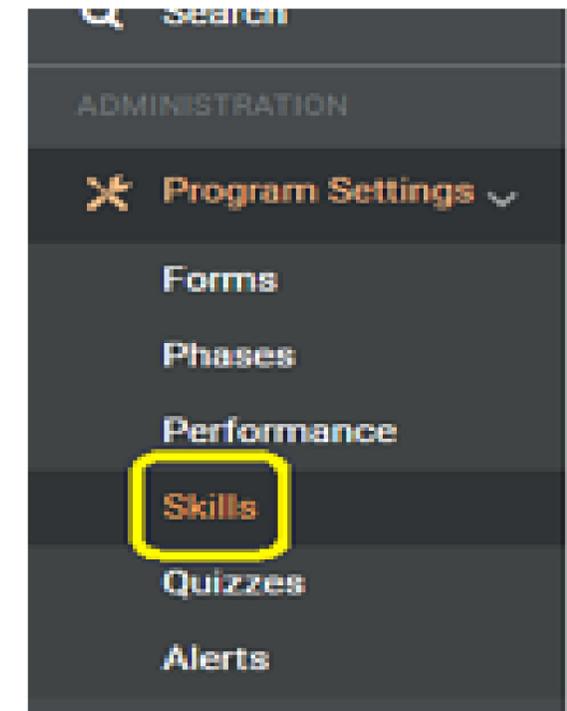
- Name:** A text input field.
- Performance Category Heading:** A dropdown menu currently showing "No heading".
- Detailed description:** A text area with a "Detailed description" link and the instruction "This allow trainers to understand the intent of the category."
- Common Responses:** A text area with a "Common Responses" link and the instruction "Trainers will use these as a base for entering their comments."
- Grade on every call activity:** A checkbox that is currently unchecked.
- Buttons:** "Cancel" and "Save" buttons at the bottom.

In the background, a list of performance categories is visible, with a red arrow pointing to a blue "Add Performance Category" button in the top right corner.

Adding/Customizing Skills

Program Coordinators and Site Admins can [add skills](#)
Program Settings>Skills>Add Skill

- Master list of skills is in site settings>site lists>skills.
- Program coordinators can pull in existing skills into the program OR create entirely new as needed.
- You can re-order by left clicking the ten-dot menu and dragging/dropping in place.



Adding/Customizing Call Types

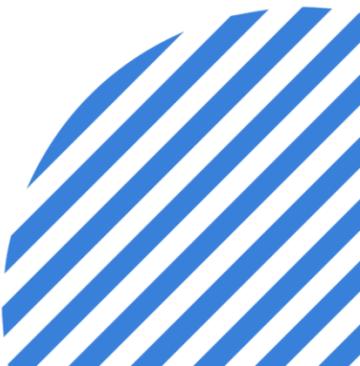
Site Admins can create call types – Site Settings>Site Lists>Call Types

- The ratings tab will let you adjust the numerical rating for all categories.
- Headings can be added to group your performance categories.
- You can re-order by left clicking the ten-dot menu and dragging/dropping in place.
- [Creating and Managing Call Types](#) can be customized according to needs.

The screenshot shows the 'Add Performance Category' dialog box. It includes a 'Name' field, a 'Performance Category Heading' dropdown menu, a 'Detailed description' section, a 'Common Responses' section, and a checkbox for 'Grade on every call activity'. The background shows a table with columns for 'Performance Responses' and 'Call Activity', and a red arrow pointing to the 'Add Performance Category' button.

You should now be able to:

- Add a new Program in PowerFTO.
- Navigate to different programs in PowerFTO.
- Designate Users as Program Coordinators in PowerFTO.
- Review setting options available for program coordinators in PowerFTO.



Questions?

