Using Propello Help

Your learning style is as unique as you are. While some of us like to read and slowly absorb all the details, others want a quick video that cuts to the chase. And sometimes, we want someone to show us what to do, step-by-step. Propello help offers all those options.

Objectives

- Using the Help Menu
- Using Getting Started Tasks
- Additional Help Features

Using the Help Menu

Help is available from every page in the application.

The Search field works like the search function in an internet browser.

The list narrows with each letter you enter.

The more information you enter, the more focused the results.

The search results divide into guided learning options at the top and articles and videos at the bottom.

Guided learning flows, identified by this icon, walk you through a process, step by step.

Knowledge articles offer written help, valid for field definitions and application processes.

The document icon indicates a knowledge article.

Short videos that you can watch right here in the product have a play icon.

Just click it to launch one.

When you clear the search, the latest software release article is pinned to the top of the list.

You'll find Help content divided into topic folders, like the Propello menu panel.

Notice the different icons.

Below is a specific new user article, a video showing you around the software, and a guided learning flow that takes you on a quick tour.

When you open any article, you have some additional search options.

Use the shortcut Ctrl F to search within the displayed page.

Type in the search bar on any document to look for related articles.

You can search for an exact word or phrase by enclosing the term in quotes.

Using Getting Started Tasks

We designed the Getting Started Tasks tab to help you learn about content related to the page you are on.

Notice how the tasks appear here on the home page.

When you navigate to purchasing, the list updates to reflect the training needed for tha*t* topic.

Users can only navigate to pages that their permissions settings allow.

As you complete each item, the application crosses it off the list *and* updates the percent completed.

Some tasks will launch a video for you to watch, and others will open a knowledge article that you can read.

Some tasks will even begin a guided learning flow that will take you through an actual process or give you a tour.

For example, we will choose to Add a New Purchase Order and follow along, letting the text move us through the process.

Just click the X at any time to cancel the help.

Additional Help Features

Many pages have a launcher that offers a tour of that part of the application and explains various features.

If you cannot find what you are looking for, try a different search term.

If that does not work, select the link to let us know to add it.

When you log in for the first time following a version update, you will see a banner with a link to learn more about the new features and enhancements.

And the home screen always lets you know what version you are on.

Recap

The help menu lets you find answers to your questions as they come up. New hires have an easy path to learn their role and track their training progress. And advanced search features let you dial into the content you need along with launchers and banners to keep you up to speed.

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