



Questionmark Conference 2017  Santa Fe

# Participants in the Portal: Boosting user experience

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# Learning Objectives

- ▶ Understand which options you can offer to help your participants authenticate—securely (password management, SSO)
- ▶ Explore profiles and use demographics for rich reporting
- ▶ Learn about customizing the look and feel of the Portal

# Authentication Options



# Local login

Questionmark

## User account

Log in

[Request new password](#)

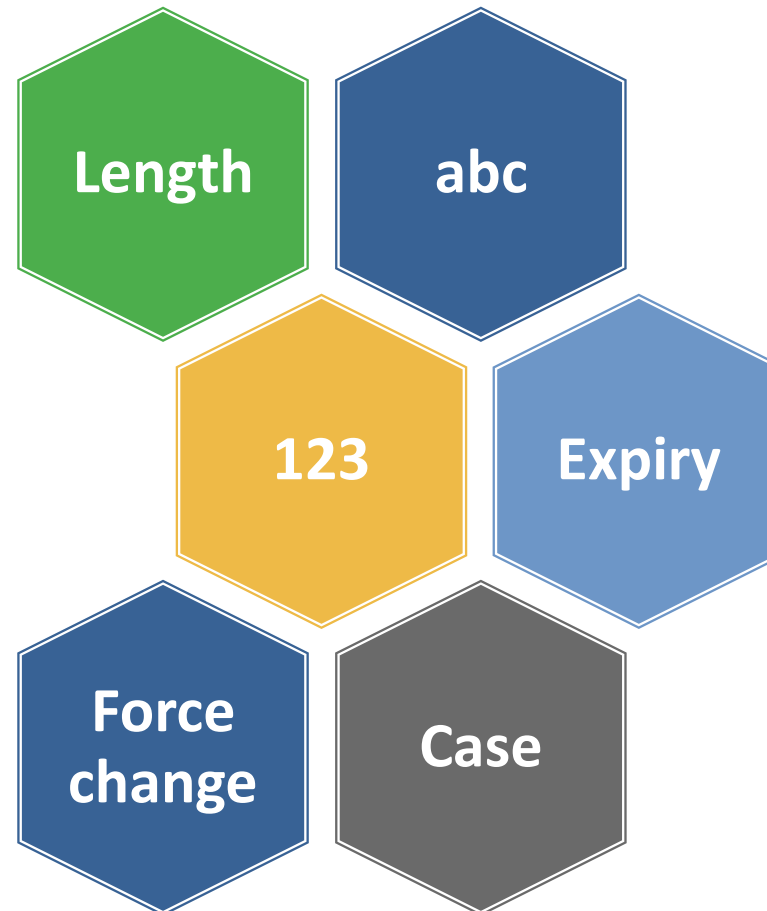
**Username \***

**Password \***

Log in

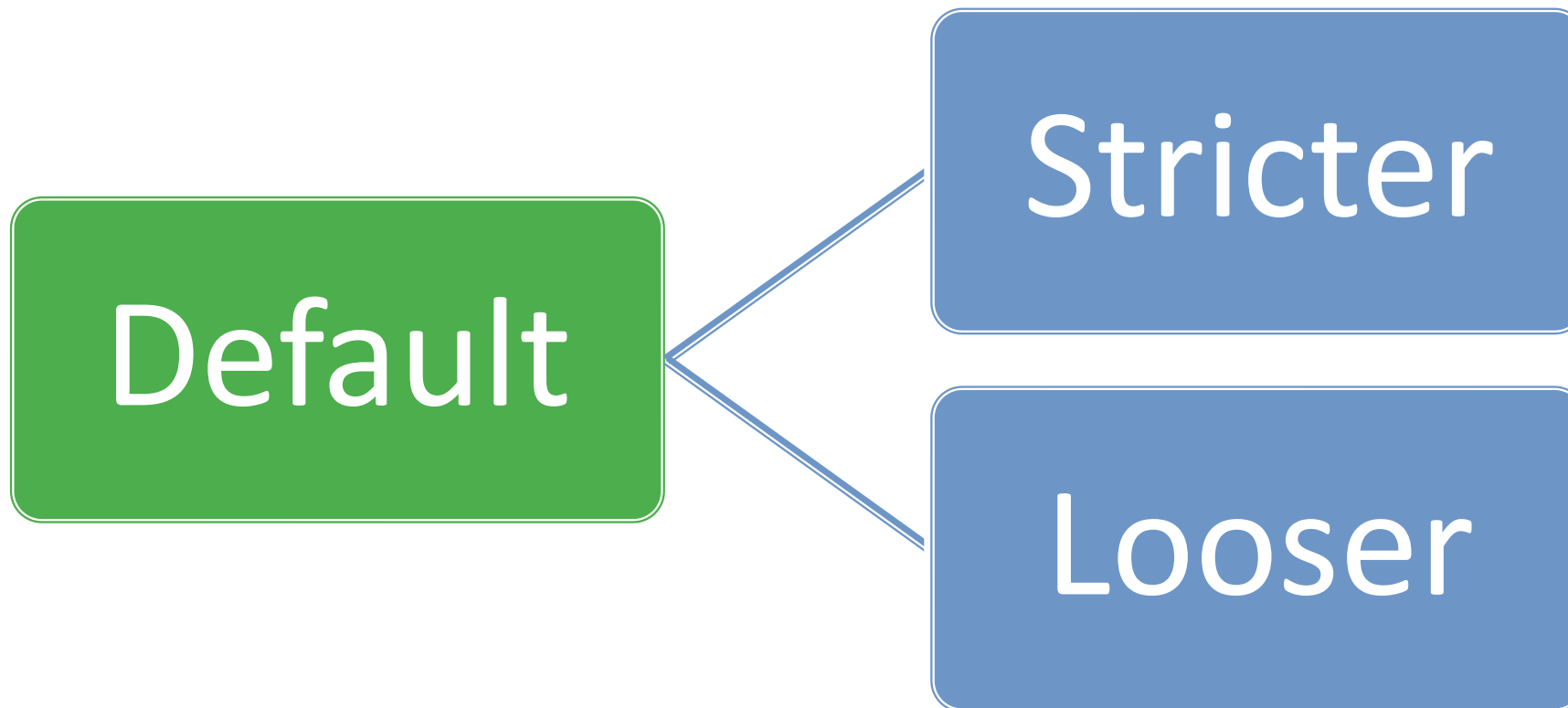


# Password Requirements





# Policy





# External login: Single Sign-On

Questionmark

## User account

Log in

[Request new password](#)

**Username \***

**Password \***

Log in

or

Log in with my organization credentials



# Profiles and Demographics in Reporting





# Several profile sections make up a user's profile

Account Main Organization Primary Address Secondary Address Details

**Current password**

Enter your current password to change the E-mail Address or Password. Request now password.

**E-mail address +**

ibart.hendricko@questionmark.eu

A valid e-mail address. All e-mails from the system will be sent to this address. The e-mail address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by e-mail.

**Password** Password strength:

**Confirm password**

**Status**

Blocked

Active

**Roles**

authenticated user

Admin

Assessment Author

Item Author

Item Bank Administrator

Monitor

Participant

Publisher

Reporter

Reviewer

Role Manager

Scheduler

Test Center Administrator

Translation Manager

**Language settings**

**Language**

English

**Locale settings**

**Time zone**

Europe/Brussels: Friday, February 17, 2017 - 15:40 +0100

Account Main Organization Primary Address Secondary Address Details

**First Name**

**Last Name**

**Middle Name**

**Alternate Name**

**Title**

**Gender**

**Date of Birth**

Month Day Year

**Details**

**URL**

**Salutation**

**Correspondence**

Account Main Organization Primary Address Secondary Address Details

**Organization Name**

**Job Title**

**Department**

**Manager**

**Assistant**

Account Main Organization Primary Address Secondary Address Details

**Address (Line 1)**

**Address (Line 2)**

**City**

**State**

**Country**

**Postal/ZIP Code**

**Phone**

**Fax**

Account Main Organization Primary Address Secondary Address Details

**Address (Line 1)**

**Address (Line 2)**

**City**

**State**

**Country**

**Postal/ZIP Code**

**Phone**

**Fax**

**Secondary Email**

Account Main Organization Primary Address Secondary Address Details

**Details 1**

**Details 2**

**Details 3**

**Details 4**

**Details 5**

**Details 6**

**Details 7**

**Details 8**

**Details 9**

**Details 10**

**Details 11**

**Details 12**

**Details 13**

**Details 14**

**Details 15**

**Details 16**

**Details 17**

**Details 18**

**Details 19**



# Several profile sections make up a user's profile

Account Main Organization Primary Address Secondary Address Details

Current password

Enter your current password to change the E-mail address or Password. Request new password.

E-mail address \*

ispant.hendrickx@questionmark.eu

If valid e-mail address. All e-mails from the system will be sent to this address. The e-mail address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by e-mail.

Password  Password strength: \_\_\_\_\_

Confirm password

Status

Blocked

Active

Roles

authenticated user

Admin

Assessment Author

Item Author

Item Bank Admin

Monitor

Participant

Publisher

Reporter

Reviewer

Role Manager

Scheduler

Test Center Administrator

Transition Manager

Language settings

Language:

Locale settings

Time zone:

**Account**

Account Main Organization Primary Address Secondary Address Details

First Name

Last Name

Middle Name

Alternate Name

Title

Gender

Date of Birth

Month  Day  Year

Details

URL

Salutation

Correspondence

**Main**

Account Main Organization Primary Address Secondary Address Details

Address (Line 1)

Address (Line 2)

City

State

Country

Postal/ZIP Code

Phone

Fax

**Primary Address**

Account Main Organization Primary Address Secondary Address Details

Organization Name

Job Title

Department

Manager

Assistant

**Organization**

Account Main Organization Primary Address Secondary Address Details

Address (Line 1)

Address (Line 2)

City

State

Country

Postal/ZIP Code

Phone

Fax

Secondary Email

**Secondary Address**

Account Main Organization Primary Address Secondary Address Details

Details 1

Details 2

Details 3

Details 4

Details 5

Details 6

Details 7

Details 8

Details 9

Details 10

Details 11

Details 12

Details 13

Details 14

Details 15

Details 16

Details 17

Details 18

Details 19

**Details**



# You can map Portal profile fields to special fields in results

Special Field Settings	Value
S1	First_Name ▾
S2	Last_Name ▾
S3	Primary_Email ▾
S4	Department ▾
S5	Primary_Address_1 ▾
S6	Primary_ZIP_Code ▾
S7	▾
S8	▾
S9	▾
S10	▾



# Demographics are available in reports after participant takes assessment

## Coaching Report

Maximum score	1
Percentage score	100%
Assessment outcome label	Pass
Special 1	Jane
Special 2	Doe
Special 3	jane.doe@qmportaltestad.onmicrosoft.com
Special 4	HR
Special 5	1348 70 street
Special 6	T6X1K9



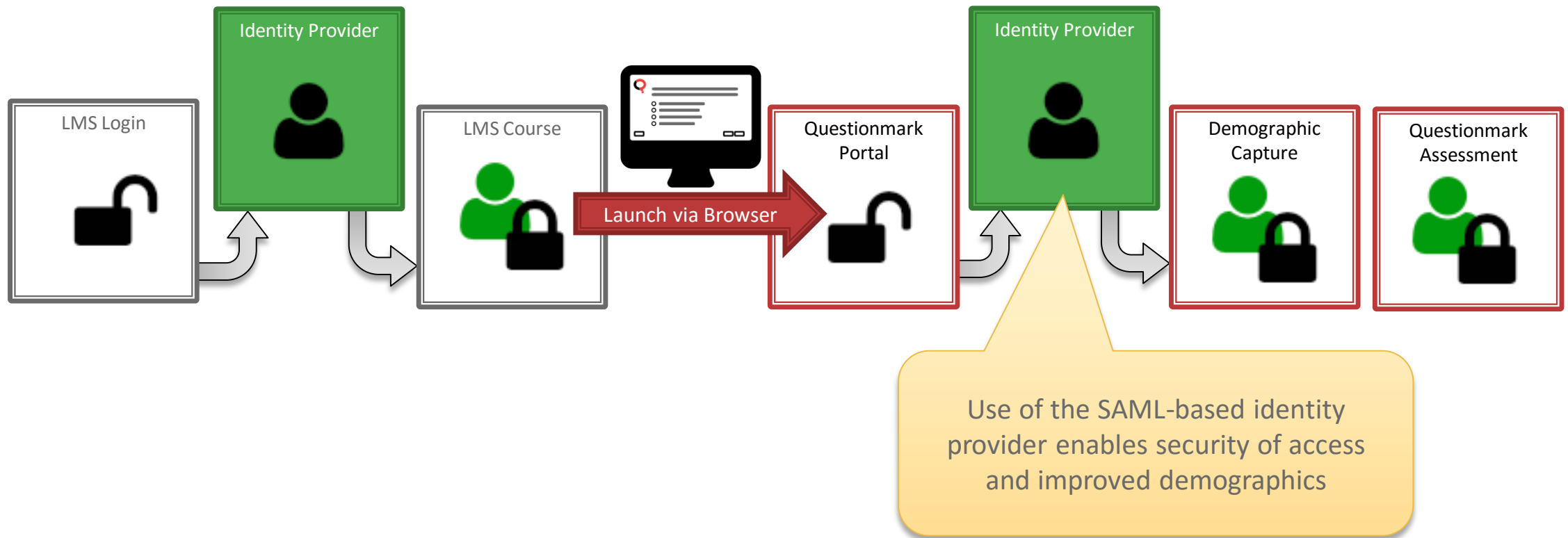


# SCORM and SAML

- ▶ SAML authentication enables customers to use an external identity provider to authenticate users
- ▶ SCORM enables customers to launch and track assessments from their LMS
- ▶ SCORM and SAML used together
  - Demographics can be captured from the identity provider and used in reporting
  - Questionmark can securely verify the identity of the participant on launch
  - Approach could be extended to other PIP-enabled launches in future



# SCORM Launch with SAML





# SAML attributes are mapped to Portal profile fields

**First Name**

<http://schemas.xmlsoap.org/ws/2005/05/identity/claims/givenname>

**Last Name**

<http://schemas.xmlsoap.org/ws/2005/05/identity/claims/surname>

**Department**

<http://schemas.microsoft.com/identity/claims/department>

**Address (Line 1)**

<http://schemas.microsoft.com/identity/claims/primaryaddress1>

**Postal/ZIP Code**

<http://schemas.microsoft.com/identity/claims/primaryzipcode>

**Which attribute from simpleSAMLphp should be used as user mail address**

<http://schemas.xmlsoap.org/ws/2005/05/identity/claims/emailaddress>



# Participant is authenticated via SAML and these attributes are sent (excerpt)

```
<AttributeStatement>
  <Attribute Name="http://schemas.xmlsoap.org/ws/2005/05/identity/claims/givenname">
    <AttributeValue>Jane</AttributeValue>
  </Attribute>
  <Attribute Name="http://schemas.xmlsoap.org/ws/2005/05/identity/claims/surname">
    <AttributeValue>Doe</AttributeValue>
  </Attribute>
  <Attribute Name="http://schemas.microsoft.com/identity/claims/department">
    <AttributeValue>HR</AttributeValue>
  </Attribute>
  <Attribute Name="http://schemas.microsoft.com/identity/claims/primaryaddress1">
    <AttributeValue>1348 70 street</AttributeValue>
  </Attribute>
  <Attribute Name="http://schemas.microsoft.com/identity/claims/primaryzipcode">
    <AttributeValue>T6X1K9</AttributeValue>
  </Attribute>
  <Attribute Name="http://schemas.xmlsoap.org/ws/2005/05/identity/claims/emailaddress">
    <AttributeValue>jane.doe@qportaltestad.onmicrosoft.com</AttributeValue>
  </Attribute>
</AttributeStatement>
```






# Customizing the Look and Feel of your Portal



# Login pages

Administration ▾

- Scheduling / Group Membership
- Schedules
- Email Broadcast
- Server Management
- Login Pages



## Create Login page

Target \*

Name of the alternative login page (you use this as a parameter in the URL).

Text before

Text after



Issues logging on? Questions about the exam process?

`<a href="mailto:helpdesk@acme.com">Email</a> or call us at +1  
555 123 4567`



# Login pages

**Username \***

**Password \***

Log in

Issues logging on? Questions about the exam process?

Email or call us at +1 555 123 4567



# Logo

**Questionmark**

## User account

Log in

[Request new password](#)

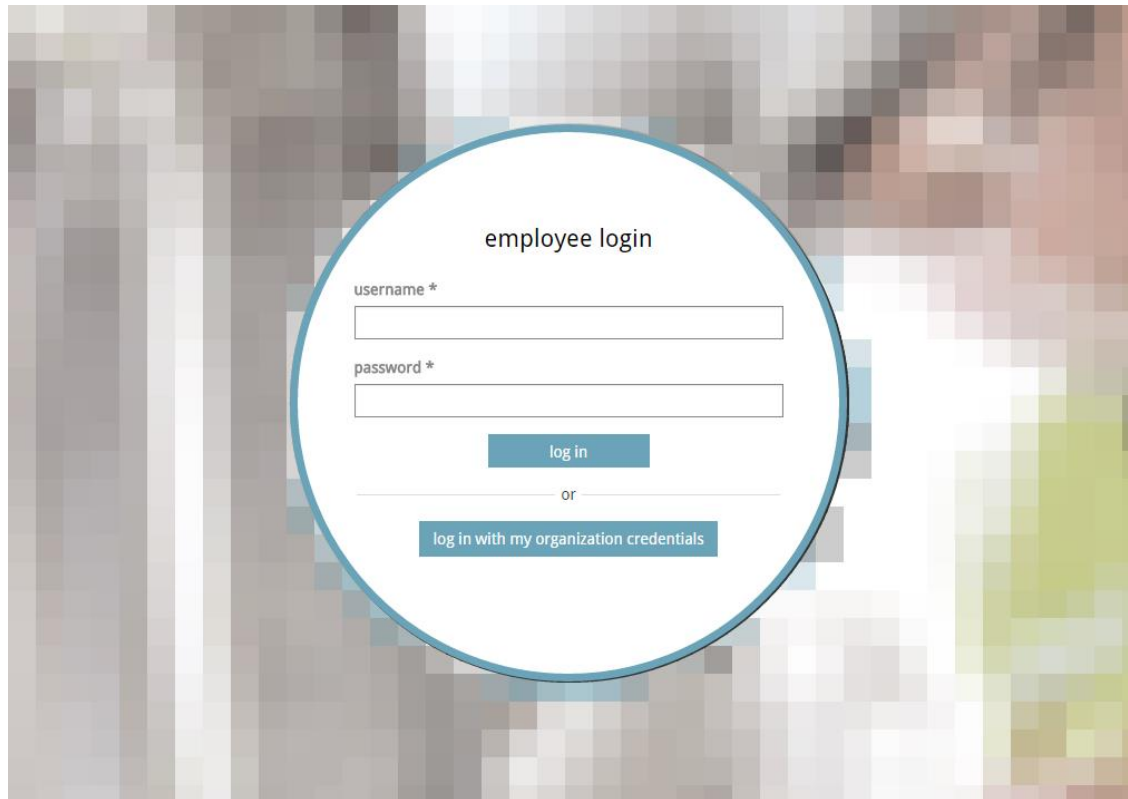
Username \*

Password \*

Log in

- ▶ We can upload your logo to your portal
- ▶ It will apply to all pages, except when delivering assessments (those use delivery templates)

# Style sheet



- ▶ We can update the style sheet of your portal
- ▶ This allows for advanced customization



# Examples of customization

## Demo

# Wrapping Up



# More information

- ▶ [Password policies](#)
- ▶ [What is SAML and how does it work?](#)
- ▶ [How can I copy demographic data to answer tables in the Questionmark?](#)
- ▶ [Login pages](#)