New User Training Checklist

responsive
formerly RFPIO

Welcome to Responsive! Get the most out of your Responsive experience by following the checklist below. Each step includes Help Center articles and Pro Tips to set you up for success. Happy responding!

1. Account Setup

This is completed as a part of onboarding/ or within a week of starting as a new user

Setup Your Account:

Login to Responsive
Setup profile (Name, Time Zone, Job Title, Phone Number, Location)
Select which email newsletters you would like to receive from Responsive
Setup display preferences
Find 'My Work' where your tasks and notifications live
Setup calendar sync to keep track of your tasks

Additional Setup Resources:

Access our Help Center
Contact our support team

2. Introduction to the Answer Library

This is for users who will be searching, reviewing, and using content in the Answer Library

Get started learning about the Answer Library: Introduction to Importing, Mircrolearning: Answer Library Advanced Search
Learn the different ways to leverage the keyword and advanced search in the Content Library
How to create and implement saved searches
Using content
Learn the different ways the Content Library can be organized
How to be a content owner and review it on a regular basis
How to add content to the Content Library

3. Introduction to Projects

For users who will be involved in projects in Responsive

Get started learning about Projects: Foundations of Project Management
Find your assigned work under the 'My Work' tab
Learn how to respond to the questions you are assigned and utilize the Recommendation Engine How to collaborate with your team using comments
Learn the importance of the save in Answer Library toggle

Responsive resources

Help Center Articles - Product Release Notes - Contact Support - RFPIO University - Responsive Blogs - Responsive webinars - LinkedIn User Group