

# ZYWAVE LEARNING - Get Started

**Congratulations, you have been granted access to the Learning Management System (LMS) through our third-party partner, [Zywave](#)!**

**In this QuickStart Guide, we will outline the steps necessary for setting up your employees in the platform and assigning training courses.**

**If you prefer video training, please visit the [EducationHub](#) to view On-Demand videos or register for live training with an expert!**

**We encourage you to reference this guide as you progress through each step. If you have additional questions, you can find helpful articles on all topics at [support.zywave.com](http://support.zywave.com).**

## Accessing The Platform

To begin, you will need to access the training platform with your administrative privileges. Most people are able to access this by logging into the [Client Portal](#) provided to you and using the navigation pane on the left to select "LMS." However, it's possible you may have a slightly different setup and will need to go to [Zywave Learning](#) directly. If you have difficulty accessing Zywave Learning, please reach out to the agency providing your access.

## Update the System Settings

Your first order of business will be to add your company's information and set the cadence for your automated email reminders sent to employees once a course has been assigned. Access this by selecting "**Settings**" in the navigation pane on the left while working in the LMS. More details can be found [here](#).

## Add Your Employees

While you can easily add individual employees, it can be a lot easier to start by importing your entire employee roster at once. After your employees [have been entered](#) into the platform, you can [grant admin privileges](#) to anyone else who might need access to maintaining your employee list and to have the ability to assign courses.

It can make it easier to manage your staff by placing employees into "[groups](#)." This allows you to assign courses to a particular grouping of employees, such as all of your managers. It tends to be easier to do this while you are initially adding your employees, but you can always return to this to complete it later or make adjustments.

Some important things to note during this step is each email address can only be associated with ONE employee record. Additionally, after an employee has accepted an invitation, deleting their employee record in the system does **NOT** delete the account they created. Oftentimes deleting the employee record at this step can cause additional difficulty for them. Instead, we encourage you to provide the instructions noted in the next step to activate their account. If they continue to experience difficulty, feel free to reach out to [Zywave Support](#).

## Send Invitations to Create Login Credentials

Before your employees will be able to start accessing the training platform, they will need to be [invited](#) to create login credentials. This is accomplished by sending a “Welcome” email and having your staff use the button it contains to activate their account. This can be accomplished during the bulk import process, if you chose to go that route. Furthermore, we recommend sharing [this article](#) with your staff to avoid common missteps.

We also highly recommend verifying any new-hires have completed activating their company email addresses before sending them an invitation, as if it bounces back to us Zywave will need to take action before additional email communications will be delivered to them. Additionally, we encourage your staff to NOT add their Google/Microsoft Single Sign-On until *after* they’ve activated their accounts (adding SSO is completely optional).

You can monitor who has been invited and activated their access by referring to the [“Status” label](#) associated with their employee record in the system.

## Assign Training Course(s)

Now that you’ve set up your staff and invited them to the platform, you are ready to start [assigning courses](#)! As you most likely have several employees that need the same course assigned, we suggest using the “Group Management” option to make assignments in bulk. However, it’s important your staff has used the emailed invitation first, as they will not be able to utilize the links in their assignment reminders until they’ve done so.

## Monitor Employees’ Progress

As an administrative user for your organization, you also have the ability to monitor your employees’ progress. This can be accomplished by using the “Employee assignments overview” widget on the “Home” page, what we call the Employer Admin Dashboard. Clicking on any of the colored tiles will bring you to the course assignments that match the status you clicked on. From here, you can use the tabs towards the top to navigate between assignments that are open, past due, and completed.

Alternatively, you are also able to [download a full course report](#) that will include *all* of the assignments that have been made. This can be used to determine who may still need to complete training, the last time an employee completed a course, as well as the records for your terminated employees.

## Have Additional Questions?

If you have questions that are not addressed in this QuickStart Guide, there are several convenient resources at hand for you regarding *all* of the functions available in Zywave Learning. For example, if you prefer video training, we encourage you to take advantage of our step-by-step instruction on our [educate.zywave.com](#) site. Alternatively, there are several helpful guides within [Zywave’s Support Site](#), many of which are linked to this document already.

Lastly, [Zywave Support](#) can be contacted via multiple methods if you have any other specific questions!

