



5/3/2023 Emtrain Admin Training Series

Session Recap & Helpful Links:

Below are the items we covered in our 5/3/2023 session, which focuses on **assignment pro-tips directly from our CSMs**. We recommend bookmarking [this Help Center link](#) for additional learning on the Emtrain platform. Here are some key pages:

Project Outline: Check out this project outline, which gives you a high-level overview of how to fully set up your training from start to finish. This is helpful for brand new admin training and seasoned admin refreshers alike.

<https://answers-support.emtrain.com/hc/en-us/articles/360055043551-Getting-Started>

New Admin Activation: For administrators having trouble logging in or navigating the Emtrain platform. Feel free to use this yourself or send it to a fellow admin you're adding to your account for the first time.

<https://answers-support.emtrain.com/hc/en-us/articles/360054613912-Step-1-New-Admin-Activation>

Site Configuration: There are a handful of site settings you want to take a look at before setting up your training. We can help you with things like SFTP or SSO integrations, and you can browse some of the optional features that are available for you to customize.

<https://answers-support.emtrain.com/hc/en-us/articles/360054614052-Step-2-Site-Configuration>

Import/Update Roster: If you're looking to add employees either via a roster import or manually, check out this link in our Help Center (there's also a helpful roster template for you to get started with 😊):

<https://answers-support.emtrain.com/hc/en-us/articles/360055044031-Step-3-Import-Update-Roster>

Admin User Roles: Here is our guide on adding new admin user roles and making edits to existing learners in the platform:

<https://answers-support.emtrain.com/hc/en-us/articles/4404603905421-Admin-User-Roles>





Last session, we covered the roster import in a bit more depth while we went through the overall platform overview. Check out the recording here:

<https://answers-support.emtrain.com/hc/en-us/articles/360055043551-Admin-Guide-Getting-Started-with-Emtrain>

Create Training Groups: For a starter's guide on creating dynamic and static groups, we've got you covered. We also have a download that outlines our recommended group configuration for your annual PWH training!

<https://answers-support.emtrain.com/hc/en-us/articles/360054616432-Step-4-Create-Training-Groups>

Content Configuration:

- Course Catalog: Browse all of our available courses by downloading our Course Catalog: <https://emtrain.com/resources/emtrain-course-catalog/>
- **Policies:** Before launching any training, it's important to check whether or not the courses you are deploying require a company policy to be embedded ahead of time. Here's (1) a succinct list of those courses that require a policy, as well as (2) some instructions for configuring your content, including your policy.
 - (1) <https://answers-support.emtrain.com/hc/en-us/articles/360027770291-Programs-Requiring-Policies>
 - (2) <https://answers-support.emtrain.com/hc/en-us/articles/360054614132-Step-5-Content-Configuration>

Campaign Creation & Communication Strategy: When creating your campaigns, follow along to our videos! This page is packed with thorough instructions, helpful tips on communication and messaging, and templates to get started.

<https://answers-support.emtrain.com/hc/en-us/articles/360055100571-Step-6-Campaign-Creation-Communication-Strategy>

Allowlist Information - Here is our guide on Emtrain's allowlist information - this will ensure that your notifications will be received by your learners:

<https://answers-support.emtrain.com/hc/en-us/articles/360025956472-Allowlist-Information>

Emtrain Reports -





<https://answers-support.emtrain.com/hc/en-us/sections/360004023412-Reports>

Pre-Deploy Checklist: It's only natural to feel nervous before launching your first campaign. Don't worry though - go through all the right last-minute checks to make sure you've covered all your bases and your campaign will be a success.

<https://answers-support.emtrain.com/hc/en-us/articles/360055100591-Step-7-Pre-Deploy-Checklist>

Session Recordings:

<https://answers-support.emtrain.com/hc/en-us/articles/15254883786637-Admin-Training-Series->

