4/5/2023 Emtrain Admin Training Series
Session Recap & Helpful Links:

Below are the items we covered in our 4/5/2023 session. We recommend bookmarking this Help Center link for additional learning on the Emtrain platform. Here are some key pages:

Project Outline: *This project outline gives you a high-level overview of how to fully set up your training from start to finish. This is helpful for brand new admins and seasoned admins alike.*
https://answers-support.emtrain.com/hc/en-us/articles/360055043551-Getting-Started

New Admin Activation: *For administrators having trouble logging in/navigating Emtrain. Use this for 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: *Look here if you're adding employees either via a roster import or manually (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

Create Training Groups: *Here's a guide on creating dynamic and static groups. 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: *Before launching 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: *Learn about what details to include in your campaign configuration, how to plan your communication and messaging, and what templates we have available to get you started.*

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

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