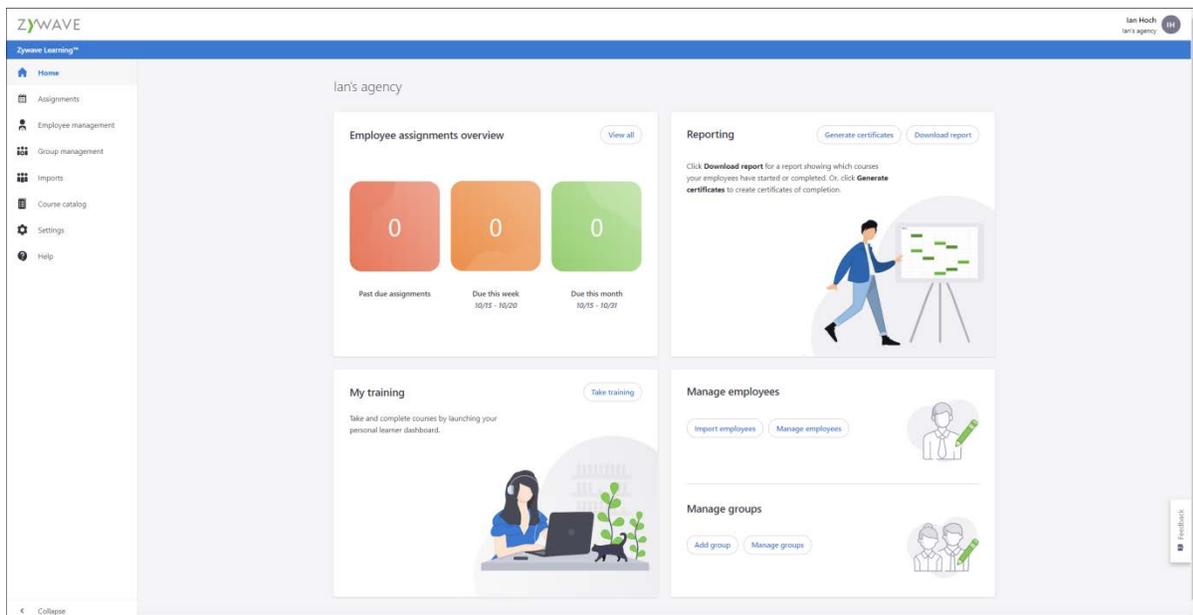


# Getting to know the Zywave Learning Dashboard

Login to Zywave Learning at <https://lms.zywave.com>

Use the side navigation or click on one of the quick actions in the employer admin dashboard to get to where you want.



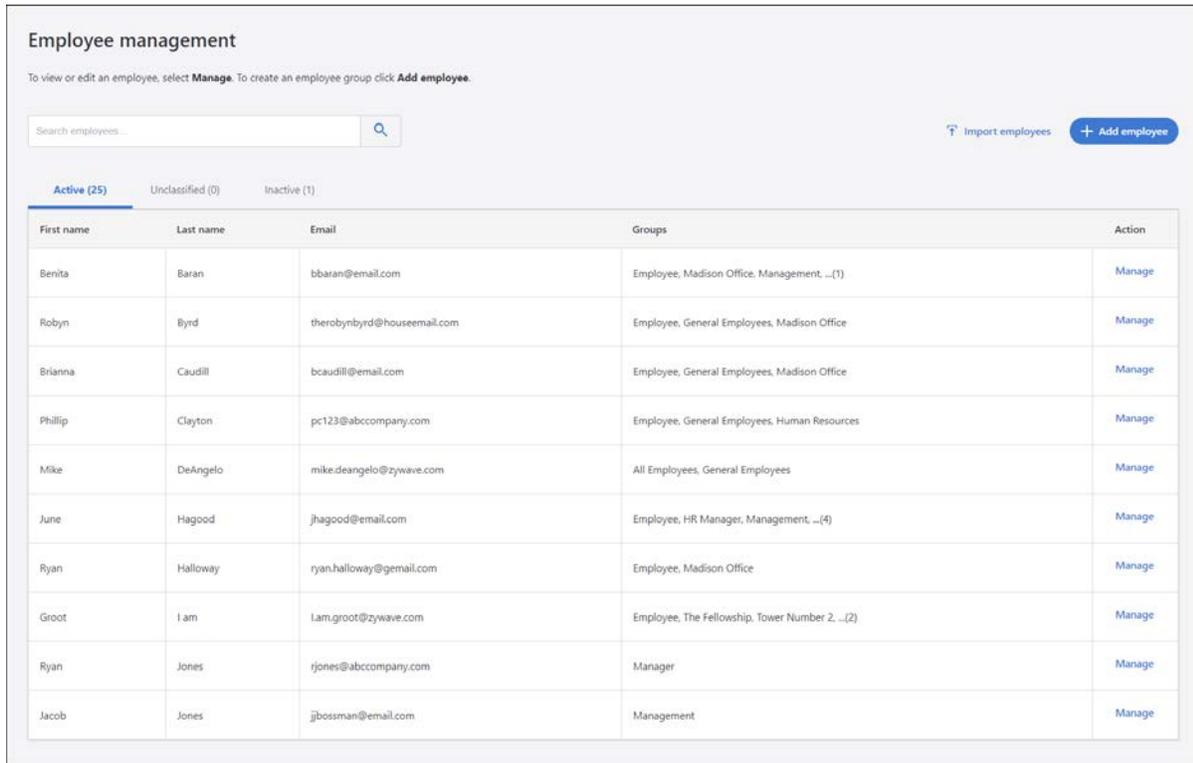
## Quick actions

Jump straight into a task using the quick actions on the dashboard:

- Get an overview on your employees' course progress with the employee [assignments](#) overview
- Use the actions in the [reporting](#) card to download a course progress report or generate [course completion certificates](#)
- **My training** takes you to **your** personal [learner dashboard](#), so you can take and complete courses
- Jump into [employee management](#) or [group management](#), or quick add a single [employee](#) or [group](#).

# Employee Management

The **Employee management** page is your hub for adding, deleting, and managing employees in Zywave Learning.



The screenshot shows the 'Employee management' page. At the top, there is a search bar and two buttons: 'Import employees' and '+ Add employee'. Below the search bar, there are three tabs: 'Active (25)', 'Unclassified (0)', and 'Inactive (1)'. The main content is a table with the following columns: 'First name', 'Last name', 'Email', 'Groups', and 'Action'. The table contains 10 rows of employee data.

First name	Last name	Email	Groups	Action
Benita	Baran	bbaran@email.com	Employee, Madison Office, Management, ...(1)	Manage
Robyn	Byrd	therobybyrd@houseemail.com	Employee, General Employees, Madison Office	Manage
Brianna	Caudill	bcaudill@email.com	Employee, General Employees, Madison Office	Manage
Phillip	Clayton	pc123@abccompany.com	Employee, General Employees, Human Resources	Manage
Mike	DeAngelo	mike.deangelo@zywave.com	All Employees, General Employees	Manage
June	Hagood	jhagood@email.com	Employee, HR Manager, Management, ...(4)	Manage
Ryan	Halloway	ryan.halloway@gmail.com	Employee, Madison Office	Manage
Groot	I am	Iam.groot@zywave.com	Employee, The Fellowship, Tower Number 2, ...(2)	Manage
Ryan	Jones	rjones@abccompany.com	Manager	Manage
Jacob	Jones	jjbossman@email.com	Management	Manage

## Employee Table

The employee table contains a list of all employees you've invited to join Zywave Learning, broken into three categories:

- **Active** employees have been invited to join and belong to at least one group.
- **Unclassified** employees have been invited to join, but have not been assigned to any groups.
- **Inactive** employees have had their access to Zywave Learning revoked by you or another administrator
  - **Note:** inactive employees' course completion statuses will still appear in [reporting](#).

## Adding employees

There are two ways to add employees to Zywave Learning:

- Create an [import](#) to add several employees simultaneously
- Use the [Add employee](#) button to add individual employees

## Managing employees

To edit [employee details](#), the [groups](#) they belong to, or send [messages](#) or [invites](#), click **Manage** on that employee's row in the table.

# Importing Employees

If you want to add more than one employee at once, you can use Zywave Learning's import feature. Just use the sidebar to navigate to the [imports](#) page, or go to [employee management](#) and click **Import employees**.

## Filling out the template

Before you can import your employees, you'll need to fill out the provided import template.

	A	B	C	D
	<b>First name</b> <small>REQUIRED</small> <b>HOW</b> Maximum 100 characters <i>Ex. Ralph</i>	<b>Last name</b> <small>REQUIRED</small> <b>HOW</b> Maximum 100 characters <i>Ex. Tennell</i>	<b>Email address</b> <small>REQUIRED</small> <b>HOW</b> Maximum 255 characters. Email addresses must follow the accepted format (localpart@domain.com) and must be unique. <i>Ex. ralphtennell@prosports.com</i>	<b>Employee groups</b> <small>REQUIRED</small> <b>HOW</b> Enter the name of an existing group to add the employee to that group. Or, create a new employee group by entering a group name in this column. Employee group names may not contain a semicolon (;). <b>NOTE:</b> To add an employee to multiple groups during upload, separate the groups with a semicolon (;). <i>Ex. Managers ; Employees</i>
1				
2	Bill	Batterman	<a href="mailto:Bill.batterman@fhghtas.com">Bill.batterman@fhghtas.com</a>	Employees
3				
4				

In order for an employee to be imported, you must fill out all four required fields: **first name**, **last name**, **email address**, and **groups**.

- **Note:** You can fill in groups you've already created in group management, or you can create a new group by entering its name in the **Employee groups** column.

## Uploading file

Once your template is ready, click New import to start the import process.

**Step 1: Upload a file** [Download template](#)

Add employees by using the [provided template](#). Use the following guidelines when filling out your spreadsheet:

- Employee email addresses must be unique
- Use a semicolon (;) to separate multiple employee group names
- Employee group names may not contain a semicolon (;)

[Choose file](#)

[Import without invitation](#) [Customize invitation](#)

Click **Choose file** to select the completed template from your computer.

## Invite now or later

Once you've chosen your file, you can decide whether you want to send out employee invitations right away, or if you'd prefer to do so later. If you'd like to wait, select **Import without invitation**. Employees will be added to the system, so you can add them to [groups](#), but they won't be able to access Zywave Learning until you [invite individual employees](#) or [group members](#) later.

If you'd like to send invitations right away, click **Customize invitation**.

**Step 2: Customize invitation**

**Subject**

**Message title**

**Message body**

[Back](#) [Complete import](#)

You can use the default text, or create your own custom invitation message. Once you're happy with your message, click **Complete import**.

**Note:** Depending on the file size, some imports may take some time to show up in the system. You can always check on the status of your import from the [imports](#) page. Additionally, you'll receive an email notification once your import is complete.

# Group Management

In Zywave Learning, groups offer you a way to organize employees and give them access to the appropriate courses (e.g., giving manager-specific courses to members of the "Managers" group). The group management page provides you with a list of all groups you've created in Zywave Learning, as well as the actions you need to manage or communicate with those groups.

Group management

To view or edit an employee group, select **Manage**. To create an employee group click **Add group**.

Search employee groups...

Group name	Members	Courses	Action
All Employees	1	3	<a href="#">Manage</a>
Employee	17	50	<a href="#">Manage</a>
General Employees	6	0	<a href="#">Manage</a>
Group Two	2	20	<a href="#">Manage</a>
HR Manager	5	2	<a href="#">Manage</a>
Human Resources	2	13	<a href="#">Manage</a>
Madison Office	5	14	<a href="#">Manage</a>
Management	5	10	<a href="#">Manage</a>
Manager	3	0	<a href="#">Manage</a>
Milwaukee Office	0	0	<a href="#">Manage</a>

< 1 2 > 1

From the group management page, you can click the **+ Add group** button to create a new group. Or, click **Manage** to access the [group details](#) page, where you can add or edit [employees](#) or [courses](#) for that group.

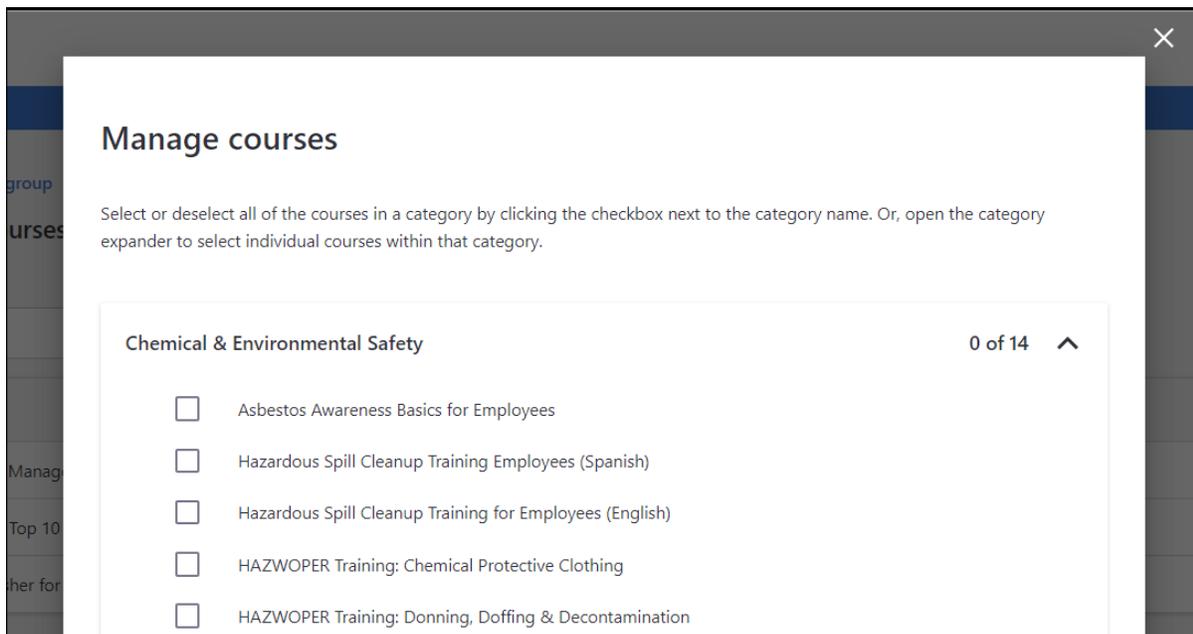
# Group Course Management

All course titles that your or other administrators have made available to members of this group will appear on this page.



## Editing available courses

To add or remove courses, click **Edit available courses**.



Then, select or deselect the checkbox beside the course title. When you're finished making your selections, click **Save**.

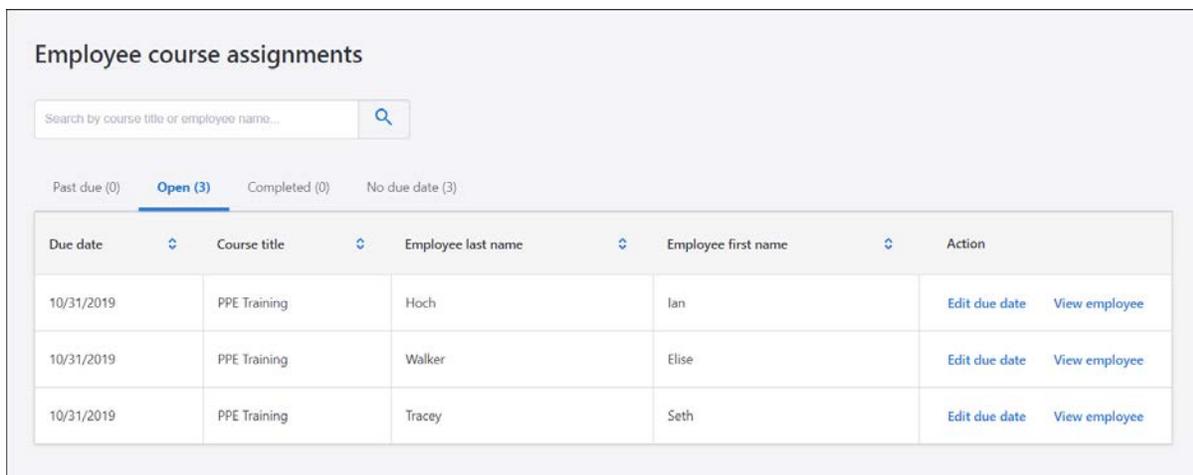
**Note:** If you'd like to see descriptions for these courses, go to the [course catalog](#).

# Assignments

Employee course assignments let you set due dates and automated reminders that help your employees finish their courses before upcoming deadlines. If you're simply interested in granting access to courses, you can do that via [group course management](#).

## Employee assignments table

The employee assignments table allows you to see all course assignments for all employees you've added to Zywave Learning.



Employee course assignments

Search by course title or employee name...

Past due (0) **Open (3)** Completed (0) No due date (3)

Due date	Course title	Employee last name	Employee first name	Action
10/31/2019	PPE Training	Hoch	Ian	<a href="#">Edit due date</a> <a href="#">View employee</a>
10/31/2019	PPE Training	Walker	Elise	<a href="#">Edit due date</a> <a href="#">View employee</a>
10/31/2019	PPE Training	Tracey	Seth	<a href="#">Edit due date</a> <a href="#">View employee</a>

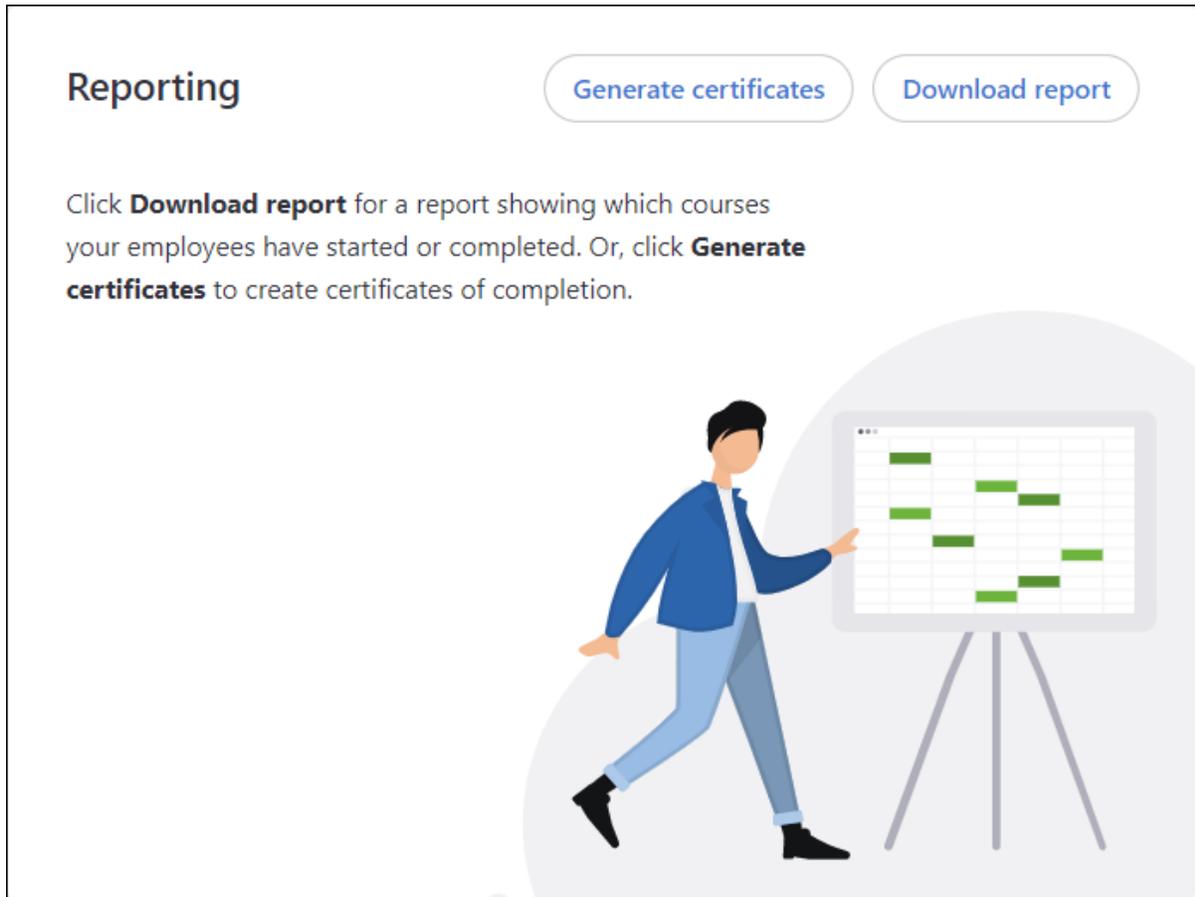
Use the search bar to search for a specific employee or course title. Or, use the tabs to browse through course assignments. There are four tabs:

- **Past due:** Incomplete assignments with a due date in the past
- **Open:** Incomplete assignments with a due date in the future
- **Completed:** Assigned courses that have been completed
- **No due date:** Courses that employees have access to but for which they haven't been assigned a due date.

In the **Action** column for any assignment, you can go to the [employee details page](#) by clicking **View employee**. You can also click the **Edit due date** button to [change that due date](#), or [set a due date](#) on the **No due date** tab by clicking **Set due date**.

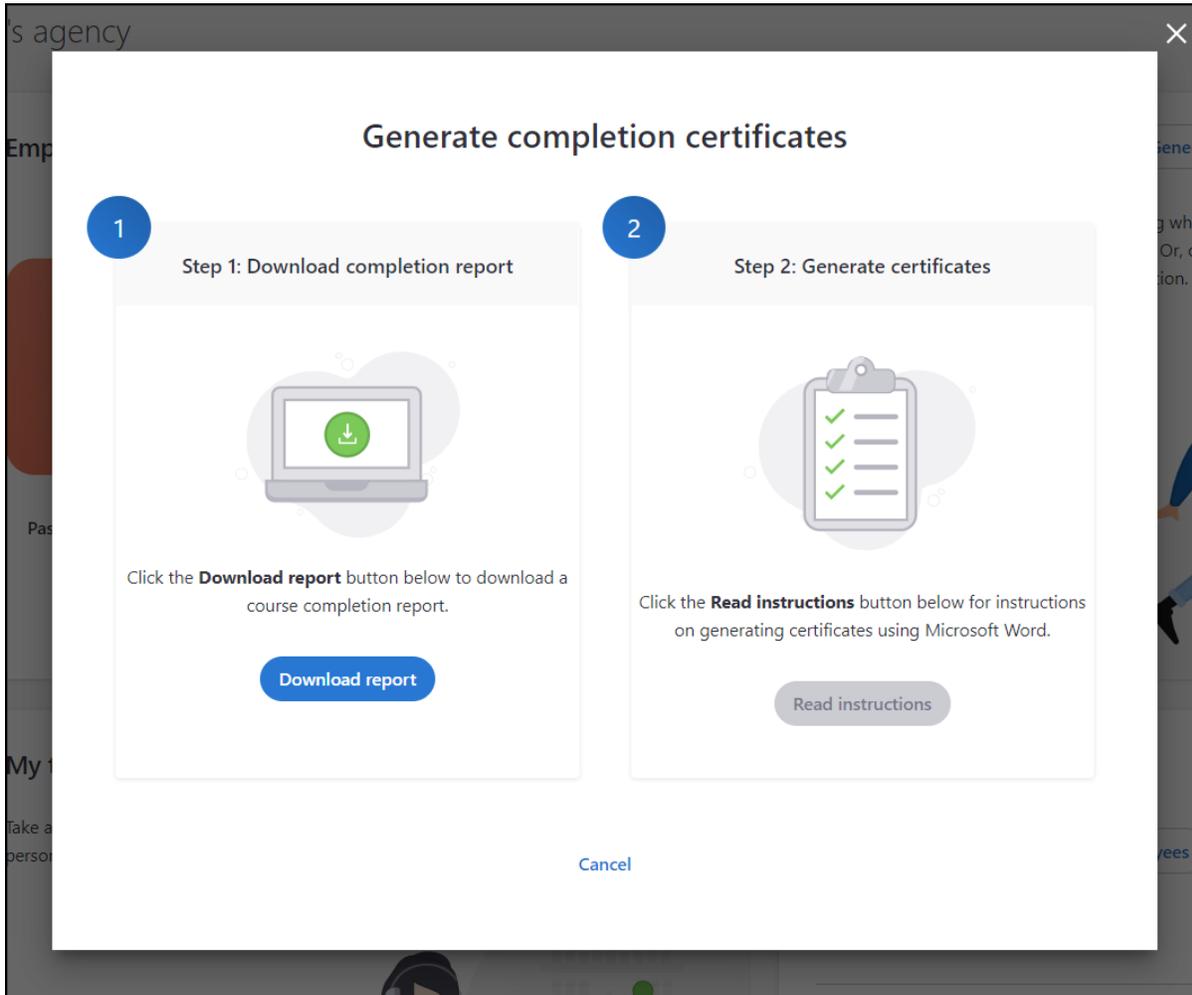
# Reporting

In order to see which employees have started or completed courses, you can download a course status report.



Just click the **Download report** button on the [dashboard](#) to start downloading the Excel file. Once it's downloaded, you'll be able to sort by any column header, including name, group, date, course status, or completion date.

You can also [generate certificates of completion](#) for your employees by clicking **Generate certificates** and following the instructions that appear in the modal.



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