

A close-up, low-angle shot of several large, vibrant teal leaves. The leaves are arranged in a way that creates a sense of depth and texture, with prominent veins visible. The lighting is soft, highlighting the natural patterns of the foliage.

User Guide

Learning Management System

Powered by Zywave
Updated February 2021

Risk Consulting for Businesses,
Employee Benefits and Individuals



AN EBSCO COMPANY



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Q: What is the Learning Management System (LMS) platform?

A: LMS allows you to provide training courses to your employees through an online portal. Courses can be assigned with due dates and automatic reminders to minimize administrative management. Track course assignments and participation or download reports to see which courses are active and/or completed. Plus, generate certificates of completion for record keeping.

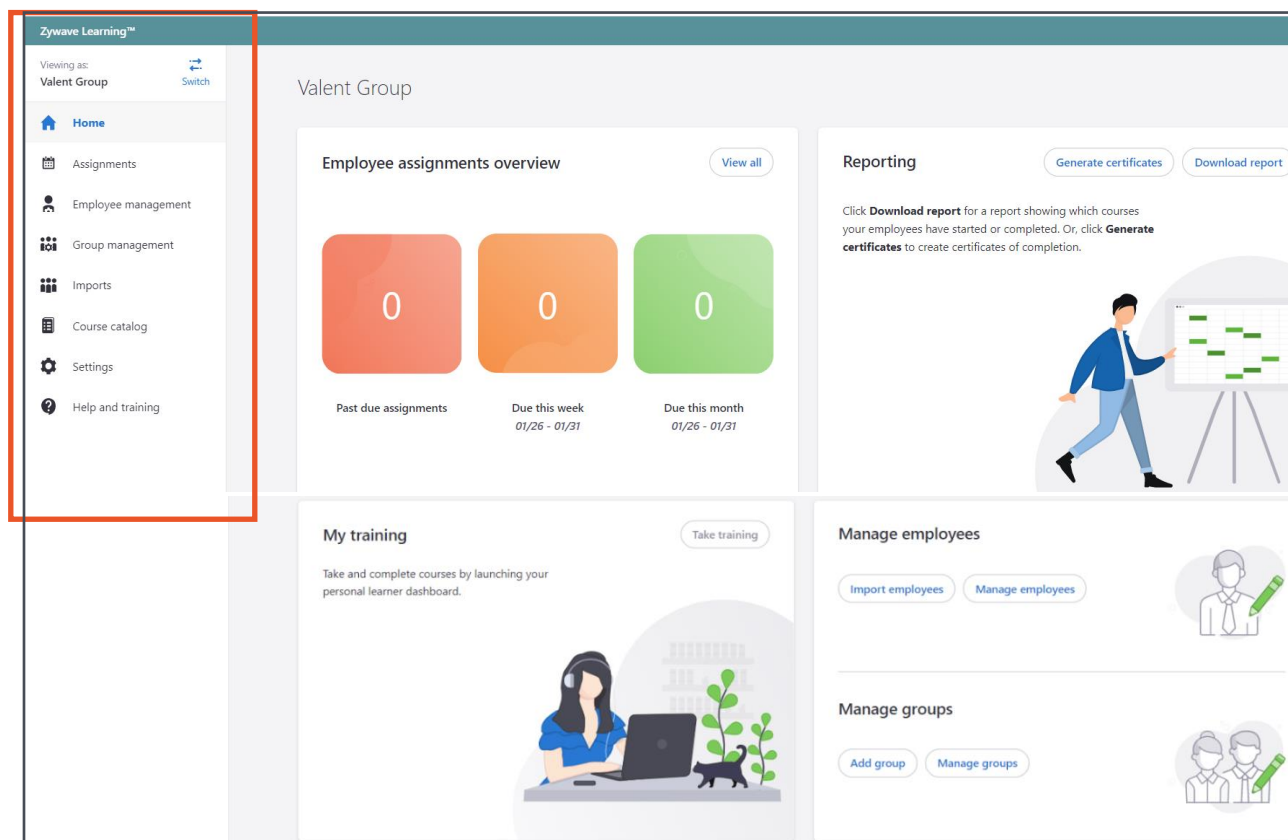
LMS includes access to a prepopulated course catalog. Customized or third-party courses can be uploaded provided they are compatible file types. Employees can be granted access to the entire course catalog should they desire to take additional courses of interest beyond assigned requirements.

If you are interested in including customized courses, [contact](#) your Valent Group team.

Q: How do I access my LMS?

A: Login at lms.zywave.com and your personalized dashboard should appear (see image below). Immediately you can view assignments that are late, due this week and due this month. You can also download a report of employee course activity or generate certificates of completion.

NOTE: *If you need assistance with setting up a login, [contact](#) your Valent Group team.*



Q: How do I navigate the LMS platform?

A: From anywhere in LMS, you can access the navigation bar, which appears on the left side of the screen (see orange box above). Simply click on the section you wish to open.

Q: How do I control the settings?

A: Under the Settings section of the navigation pane, you can set the organization's name and address as well as when employees begin receiving reminders about their course due dates.

Due date reminder settings
Adjust when employees will receive due date reminder emails.

Send daily email reminders starting before due date until employee has completed the course.

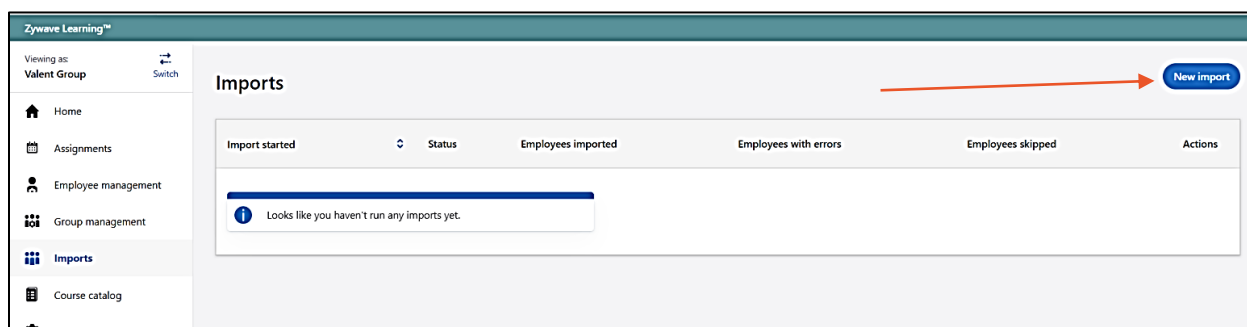
Send daily past due email reminders ending after due date until employee has completed the course.

Q: How do I add employees?

A: Your Valent team will help you with your initial upload and any bulk imports you would like to do in the future. To begin, enter your employee information (at minimum name and email address) in this excel formatted [import template](#).

This template can also be found online through your system:

- + Go to the **Imports** section through your navigation pane (see below).
- + Click the “**New Import**” button (see red arrow below).
- + Next click “**Download template**” (also shown below).
- + Alternatively, select **Employee Management** in your navigation and click “**Import Employees.**”



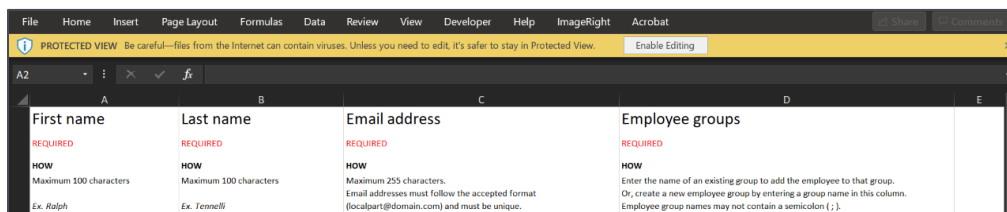
Step 1: Upload a file

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 (;)

Once you click the download button, the Employee import Excel file will download.

- + Open the file and click “Enable Editing” if the protected view banner appears at the top.
- + Add in each employee’s information on a separate line.
- + Courses are assigned through groups, so indicate a group name in **column D**. Use the same group name for everyone if all employees will have access to the same courses (e.g., General or All Employees). For more information, see page 6.



- + Save the file when you are finished.

Uploading Your File to LMS

Click the **Choose file** button on the upload screen.

A file explorer window will open.

- + Find and select the file you saved and click “Open.” The file name will appear in the box.
- + You can import the employee records without notifying the employees using the “Import without invitation” button.
- + Or send notification emails simultaneously by selecting the “Customize invitation” button.

Welcoming Employees to LMS

On the next screen you will be provided with a template message welcoming employees to the LMS.

- + This message is editable. Update the subject line, title or body as you like before sending.
- + Click the **“Complete import”** button, which will upload the file and send the notification emails.

Step 2: Customize invitation

Subject

Message title

Message body

You have been invited to join Zywave Learning, a learning management system that allows you to take training courses assigned to you by your employer.

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

Adding Individual Employees

You can also add individual employees without a mass upload.

- + On the **Employee management** screen click **“+ Add employee.”**
- + Enter their name and email address.
- + Optional: assign them to a content group (see next section for groups).
- + Send them an invitation email from this add screen.

Status: Unclassified


Employee details
First name

Last name

Email

[Save](#) [Cancel](#)

0
Groups
[Manage](#)

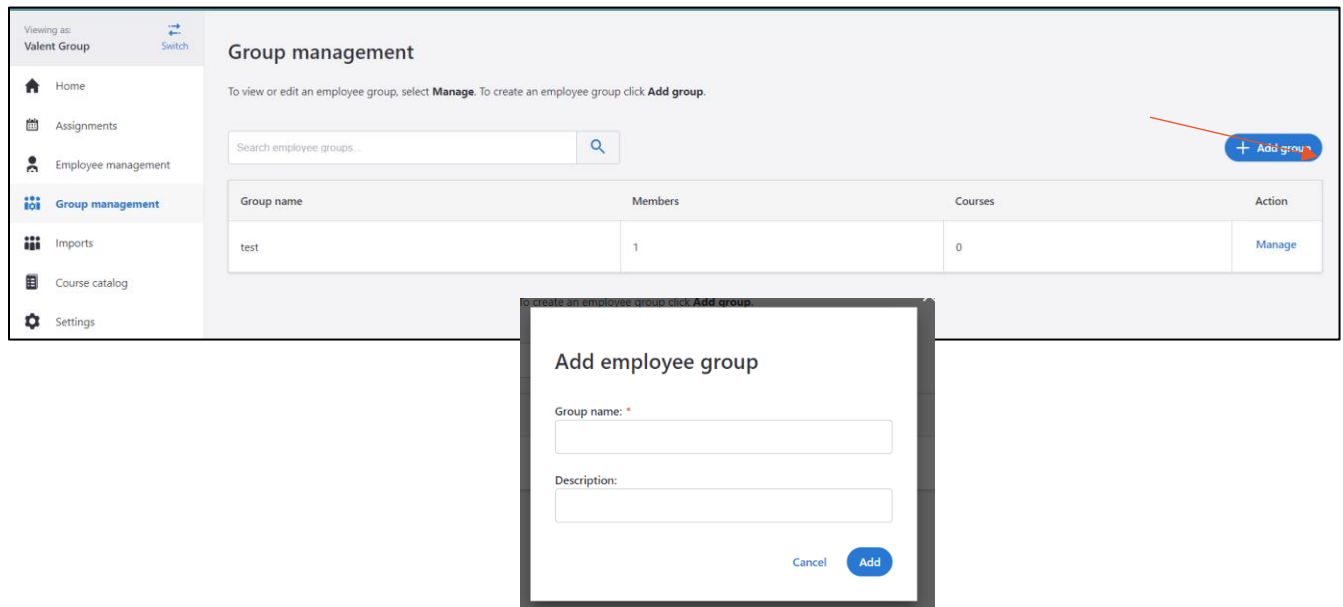

[Message employee](#) [Send invite](#)

Q: How do I assign groups?

A: Once the employees have been added to the system, they must be assigned to content groups (if this was not done as part of the import.)

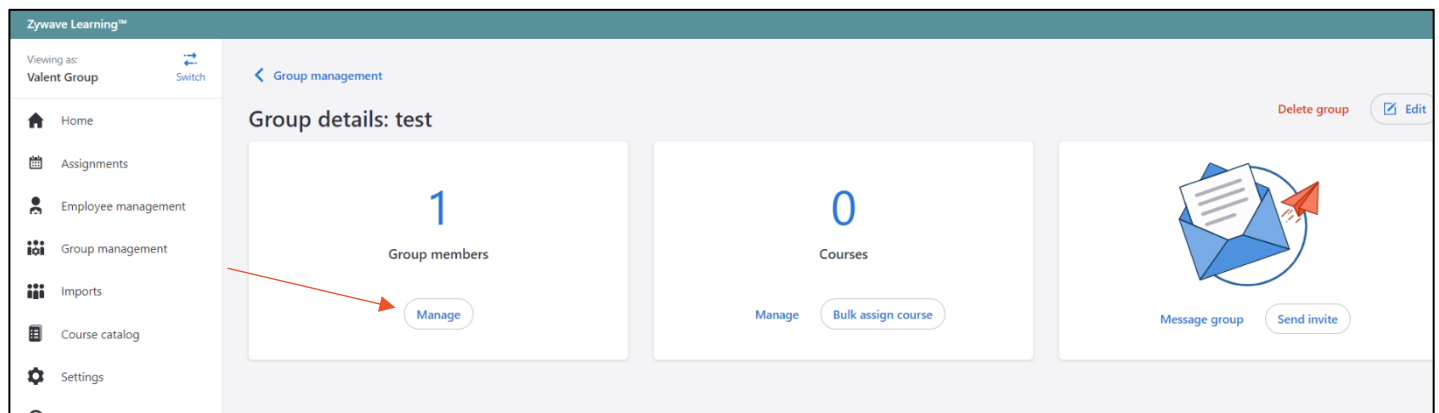
Creating New Groups

- + Go to the **Group management** section in the navigation pane.
- + Click **+ Add Group** button.
- + Give the group a name and optional description.
- + Click **"Add."**



Adding Employees to a Group

- + Click **"Manage"** next to the name of the group to add an employee to it. (see arrow below)
- + Click **"+ Add employees."**



- + Select employees by clicking the **green plus sign** to the right of their name (shown below).

- + Their name will then appear under the “**Selected**” column to the right.
- + To remove them, click the red “X” icon that will appear next to their name.
- + Search for employees using the **search bar** or filter to show only those who have not been put into a group by checking the box next to “**Show only unclassified.**”

Add employees to test

Click the + icon to add employees to this group

Cancel Save

Employees: 1

Jane Doe

☐ Show only unclassified
 ☐ Show not active employees

Selected: 0

Selected:

Employees: 1

Jane Doe

☐ Show only unclassified
 ☐ Show not active employees

Selected: 1

- + Only **active employees** will be shown.
 - o To see **deactivated employees** listed, check the box next to “**Show not active employees.**” This may be helpful if you do not see an employee whom you expect to find in the system.
- + Once you have selected the employees you want added to this group, click the “**Save**” button.
- + You will be taken back to the group details page.

You can send welcome emails to those you added to the group if you did not send them as part of a mass upload. You can also send a message to the members of the group if you wish.

Zywave Learning™

Viewing as: Valent Group

Switch

- Home
- Assignments
- Employee management
- Group management
- Imports
- Course catalog
- Settings

< Group management

Group details: test

1

Group members

Manage

0

Courses

Manage Bulk assign course

Message group Send invite

Send invite to test

Send an invitation which includes a link for employees in this group to set up their Zywave Learning accounts.

☐ Send only to employees in this group who haven't set up their accounts
☐ Send invite to all employees in this group

Subject

Welcome to Valent Group's Learning Management System

Message title

Welcome to Zywave Learning!

Message body

You have been invited to join Zywave Learning, a learning management system that allows you to take training courses assigned to you by your employer.

Cancel **Send invite**

Send email

Subject

Subject...

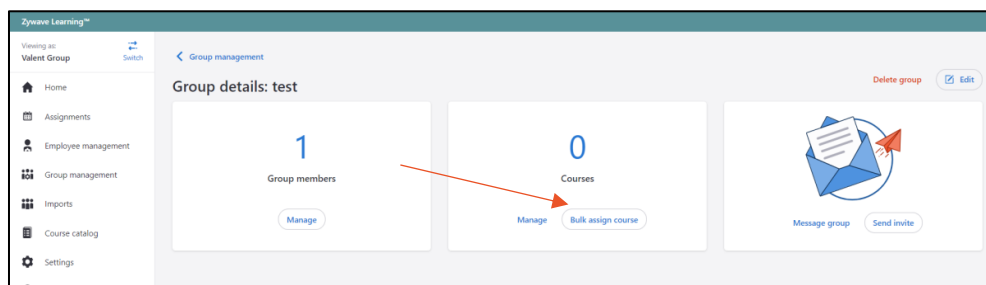
Message body

Message body...

Cancel **Send email**

Q: How Do I Assign Courses?

A: Once you have built a group and added employees to it, you can assign courses using the “Bulk assign course” button on the group details page.



- + Select a course from the dropdown menu in the pop-up window.
- + Set a due date.
- + Access settings for when employees will receive email reminders (this can also be accessed under the Settings section of the navigation pane).

Bulk assign course to test

Course:

Select a course...

Due date

27 Jan 2021 ☒ Only assign to employees who don't already have a due date for this course

Email reminders

☒ **EMAIL NOW** - An email indicating they've just been assigned a course

☐ **BEFORE DUE** - A daily reminder email starting 3 weeks **BEFORE** the due date

☐ **PAST DUE** - A daily past due reminder email ending 3 weeks **AFTER** the due date

Reminders will stop once your employees have completed the course. You can change reminders for all assignments in your settings.

Cancel **Bulk assign course**

Alternate Options

You can provide access to a specific course to a group without requiring it to be completed (the course is not officially assigned, and no reminder emails will be sent).

- + Click the **“Manage”** link next to the **“Bulk assign course”** button.
- + Click the **“Add courses”** button on the following page. (It may say **“Edit available courses”** if you already have some courses available.)
- + Click the down arrow next to a category to see the courses available.

Manage courses

Open the category expanders below to select courses.

Chemical & Environmental Safety	0 of 3	▼
Construction Safety	0 of 12	▼
Coronavirus Prevention & Response	0 of 3	▼

Chemical & Environmental Safety 1 of 3 ^

- ☒ Asbestos Awareness Basics for Employees (English-2021 Edition)
- ☐ Hazardous Spill Cleanup Training for Employees (English)
- ☐ Stormwater Pollution Awareness for Employees

- + Check the box of any class you want to include (example above).
- + **Scroll** down to the bottom of the pop-up window and click **“Save.”**
- + Now anyone in the group will be able to take that course if they wish.

Q: How Do I Track Employee Training?

A: On the home page you will see the employee assignments overview. To see more details:

- + Click on the **colored square** above the timeframe you are interested in seeing (i.e., the red square to see assignments that are late).
- + Or click the **View All** button in the top right corner of the section (see red arrow below) for full assignment details.
- + You can also access these details by going to the **Assignments** section in the navigation bar from anywhere in the LMS.

Zyrax Learning™

Viewing as: Valent Group Switch

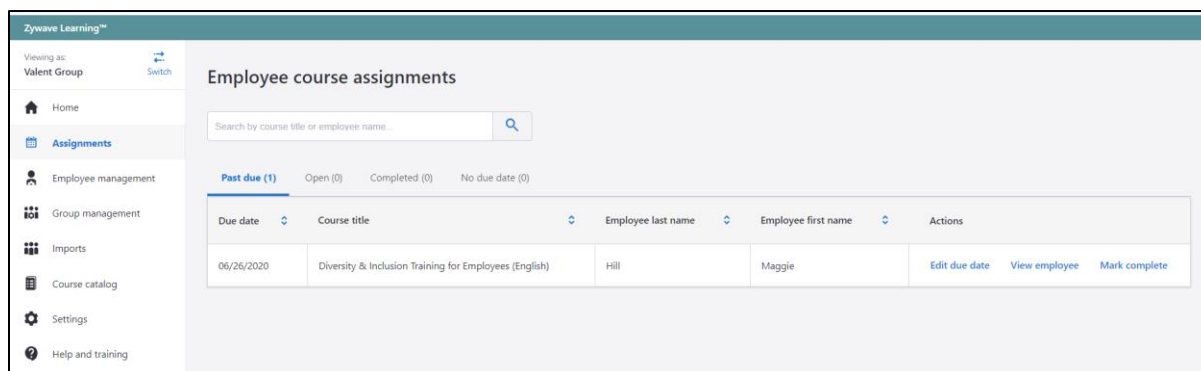
Valent Group

Employee assignments overview View all

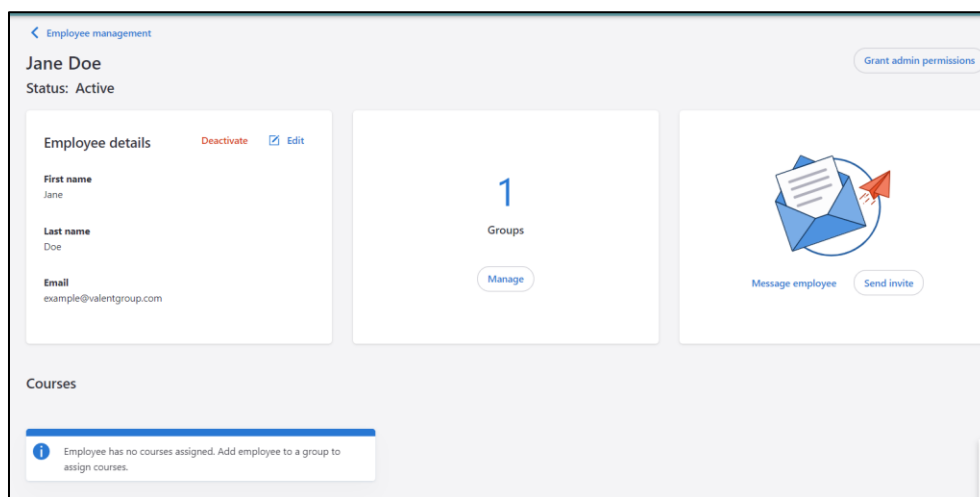
0	0	0
Past due assignments	Due this week 01/26 - 01/31	Due this month 01/26 - 01/31

You will be taken to the course assignments list view (see below), where you can see the course name, employee name and due date. These assignments are grouped by status (*i.e.*, past due, open, etc.).

- + Click the tabs above the table to view the assignments in each category.



From this view, you can also change the due date of the assignment, manually mark it complete or view the employee's detail page (see below). An employee's detail page shows their name and email address, the courses they have been assigned and how many groups they are in.



Adding to Additional Groups

- + Click the **“Manage”** button.
- + Send them a message or welcome email by clicking the **“Message employee”** link or **“Send invite”** button.

Granting Administrator Permissions

The **“Grant admin permissions”** button allows an employee to manage groups and course assignments.

Deactivating / Reactivating an Employee

You may remove an employee's access to LMS in the employee detail page, (usually done when an employee leaves the organization). Reactivating can be done here as well (the red **"Deactivate"** link is replaced by a red **"Activate"** button).

Any of the employee detail pages can be accessed by going to the Employee management section of the navigation pane and then clicking **"Manage"** next to the employee's name.

Q: How do I view available courses?

A: Courses are listed in the **Course Catalog**, which can be accessed through the navigation pane. The duration and a brief description of each course is provided below. You can browse through the list (shown alphabetically), search for specific course titles or filter by category using the dropdown window.

*PLEASE NOTE: you **cannot** assign courses from the catalog, only view them.*

The screenshot shows the 'Course catalog' interface. At the top, there is a 'Filter by:' dropdown menu set to 'All Categories' and a search bar labeled 'Search course title...'. Below the filter and search bar, there are four course cards arranged in a row. Each card has a colored header, an icon, a title, a duration, and a brief description.

Course Title	Duration	Description
General Workplace Safety Accident Investigation Techniques for Managers	12 minutes	This training on accident investigations explains the steps to a thorough investigation, including investigative goals, securing an accident scene, interviews and more.
Workplace Harassment & Violence Active Shooter Attack Survival Training for Employees (English-2021 Edition)	15 minutes	Too often these days, we hear about active shooter incidents in workplaces. This safety video explains survival techniques recommended by law enforcement to help people get through an active shooter incident safely. Topics covered include preparing for the unpredictable, recognizing and surviving an attack, running from a shooter, hiding from
Workplace Harassment & Violence Active Shooter Attack Survival Training for Employees (Spanish-2021 Edition)	15 minutes	Too often these days, we hear about active shooter incidents in workplaces. This safety video explains survival techniques recommended by law enforcement to help people get through an active shooter incident safely. Topics covered include preparing for the unpredictable, recognizing and surviving an attack, running from a shooter, hiding from
Ergonomics Adjusting Workstations & Postures (English)	13 minutes	This course demonstrates how to adjust a workstation to maximize neutral postures and minimize pain, discomfort, and strain.

Q: How do I generate certificates of completion?

A: From the home screen,
+ Click **"Generate certificates"** button.
+ Then click the **"Download report"** button on the pop-up screen.

The screenshot shows a pop-up screen titled 'Generate completion certificates'. It contains two steps, each with an icon, a title, and a description.

- Step 1: Download completion report**
Click the **Download report** button below to download a course completion report.
Download report
- Step 2: Generate certificates**
Click the **Read instructions** button below for instructions on generating certificates using Microsoft Word.
Read instructions

- + Save the course completion report that downloads.
- + Click the **“Read instructions”** button that will activate after you download the report and follow the instructions there.

Q: What if I need help?

A: The Help and training section of the navigation pane will open Zywave’s help portal which offers instructions, articles, free webinars, etc. Alternatively:

- + View Valent Group’s training video [here](#).
- + Reach out to your Valent benefits consultant.
- + Contact our in-house Zywave administrator at PortalAdmin@valentgroup.com.
- + Contact Zywave’s customer service team at 866-499-9238.

Q: What do employees see?

A: Employees will be given access to a Learning Dashboard once they set up their account (this is done through a guided process with the invitation email sent from the admin). It will provide a summary of the courses they have access to and those that they have already started or completed.

By scrolling down, they can see the courses they have in progress as well as all the courses they have access to. Employees can search, filter or sort to find specific courses, and then they simply click on the course of interest to begin.

Welcome to your Learning Dashboard!

You can check on your progress, track your courses, and search for content related to your industry.

AVAILABLE

3

STARTED

2

COMPLETED

0

DAILY ACTIVITY

Activity

In Progress 1

Asbestos Awareness Basics for Employees (English-2021 Edition)

SCORM

Continue

What are you looking for?

Search

Filter by

Sort by

Category

Chemical & Environmental Safety (3)

Asbestos Awareness Basics for Employees (English-2021 Edition)

Chemical & Environmental Safety

Employers are required to provide basic awareness training for employees who may have to work around asbestoscontaining materials. This program covers topics where training is required by various government safety regulations, and forms the core of the two-hour asbestos awareness training requirement mandated by OSHA.

valent
GROUP

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