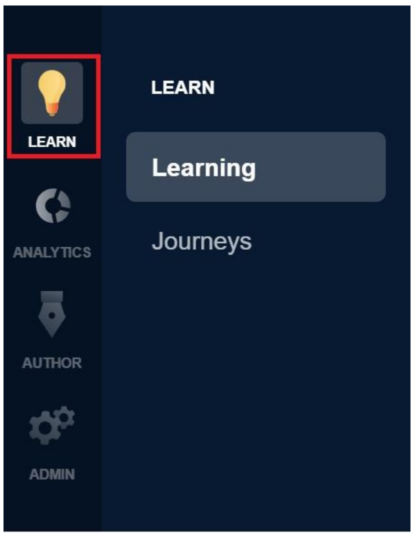
NAVIGATION OVERVIEW 2023-08-20

This "How-To" PDF Guide will assist you in learning to navigate through the SafetyNow LMS eLearning platform, supported by Bridge & Bongarde/SafetyNow, in partnership with Texas Mutual Insurance. To view the full How-To video, please visit [https://texasmutualstg.wpengine.com/texas-mutual-help/].

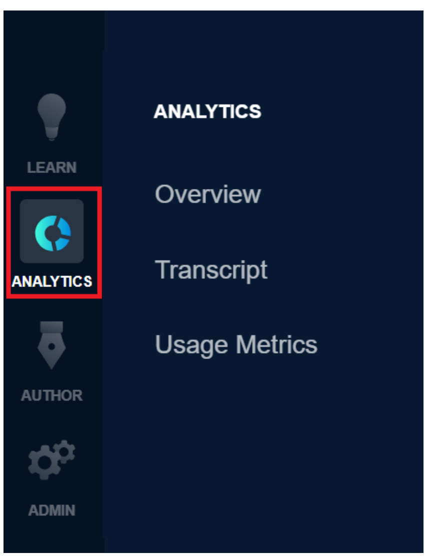
Learning to Navigate and Utilize the Admin Functions

As a user with "Administrator" permissions, you have access to the full array of administrative functions and tools necessary for managing, creating, and assigning eLearning & training courses online. All of the admin functions are accessible by navigating to the left pane, where you will see "Learn", "Analytics", "Author" and "Admin". In this "How-To" guide, we'll be covering what functions each of these menu options serve.



LEARN

The "LEARN" tab is the landing page of the LMS platform. Whether you are a user with admin permissions, or a standard learner, this is the first screen you will see once you are logged into your SafetyNow eLearning account. From this screen, you will be able to see all courses assigned to you. Whether those courses are "Required", "Recommended" or "Available in Library", this is the page from which you will access all training content. It's important to note, this page is the **only** page accessible to standard "Learner" users on the platform. The "Journeys" sub-section of the "Learn" tab is where users will be able to access their "Journeys". Journeys are a special kind of program that can be built by users with Admin permissions, to group training content. For example, you may wish to create a Journey for "Onboarding", "New-Hire Training", "Office Staff", "Field Technicians", etc. The options are near limitless with Journeys, when it comes to creating custom programs for your learners to complete and track their progress.

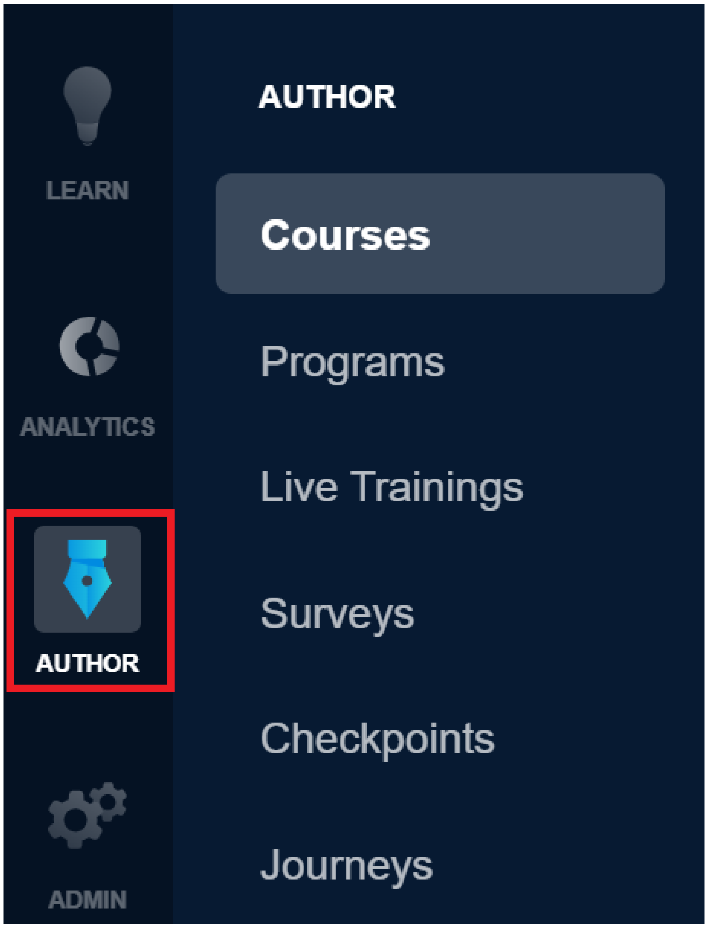


ANALYTICS

The "ANALYTICS" tab is where you can access high level, or granular statistics on all enrollment data. Reports can be exported and scheduled for delivery from the various Analytics tools.

The "Overview" page presents you with a plethora of data, primarily presented in images, such as pie charts, bar graphs, line graphs, and other physical representations of enrollment history & data.
The "Transcript" page will present you with the same enrollment data, with the same level of specificity available through the various filters and search fields. The information is presented in a chart/table form, similar to an "Excel" format.

The "Usage Metrics" page presents a more high level view of enrollment data, similar to the "Overview" page, with less specificity.



AUTHOR

The "AUTHOR" tab is where you can view, manage & create training content.

"Courses" will show your full course library. You can also Upload or Create courses from here.

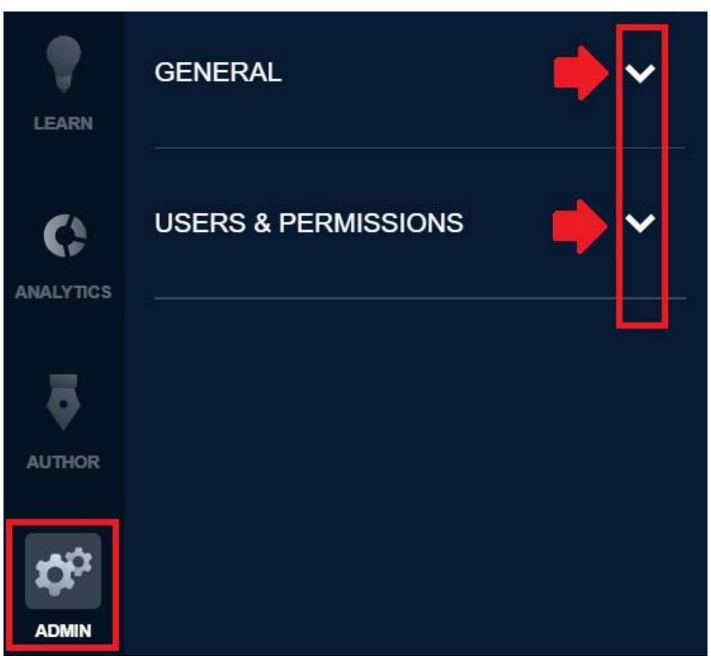
"Programs" is where you can access existing programs or create new ones, to assign to learners. Much like Journeys, Programs are used to compartmentalize your training, for example "Fire Safety", or "Driver Safety".

"Live Trainings" allow you to create and host in-person or virtual live training sessions, and still track attendance & completion for compliance.

"Surveys" are exactly that – you can build, manage & assign surveys here.

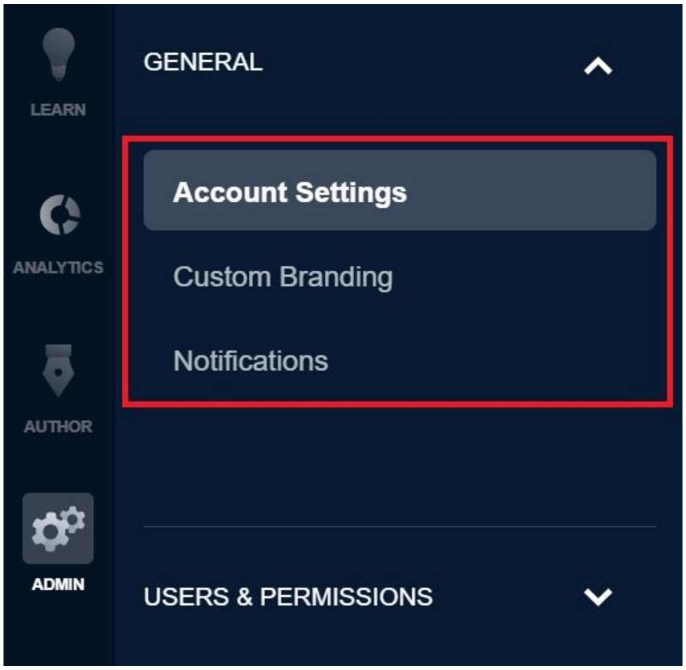
"Checkpoints" can be added to Programs or Journeys or assigned individually. A checkpoint is used where training requires approval by an admin or supervisor/manager.

"Journeys" are similar to programs, with more depth and features, including dynamic changes to content included within the Journey.



ADMIN

The "ADMIN" tab is where the majority of the admin functions are housed. You will notice, along the right vertical, there are arrows to expand each option. We'll break those menus down in more detail below. As you can see, the menu functions accessible from the "Admin" tab are: "General", and "Users & Permissions". You may also see "Learning" and "Tools", but there are no functions required for users with Admin permissions in either of those menus. Whether you are adjusting account settings, adding new learners/users to your account, creating/managing groups, or masquerading as a learner, the "Admin" tab is where you will find the majority of the tools accessible to you as an "Admin" user.

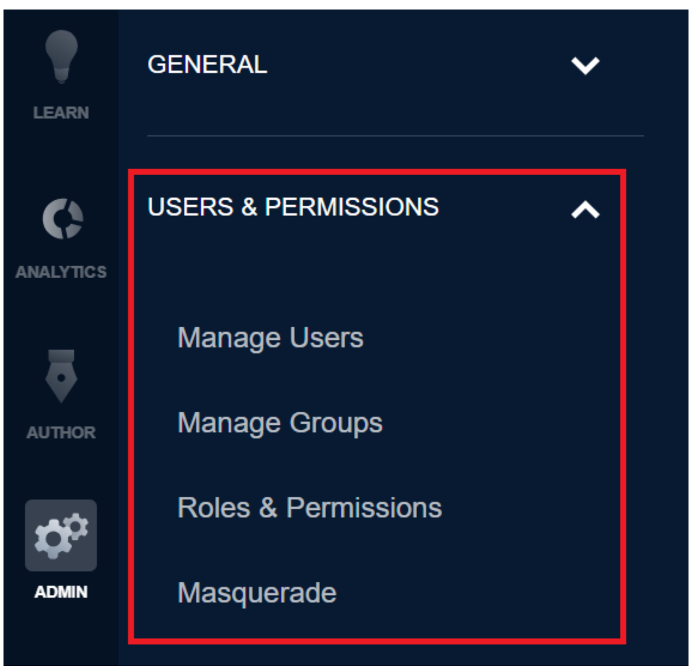


GENERAL

The "General" sub-menu, accessible from the "ADMIN" tab will allow you to view "Account Settings". These settings are typically pre-configured by our team, and are usually restricted to users in an "IT Admin" role. Your permissions and access to "Account Settings" may be limited.

"Custom Branding" is a menu which may be restricted, but this section allows for importing a company logo or color-scheme to personalize the "SafetyNow" platform with your company flair. Ask your Texas Mutual Safety Centre Support Team for more information!

"Notifications" are exactly that. You can disable/enable email notifications to your preference. By default, these will be toggled "ON" for all notification types.



USERS & PERMISSIONS

The "Users & Permissions" sub-menu allows management of users and groups.

"Manage Users" is where you can see and manage your full list of users.

"Manage Groups" is where you can create groups of users by department, team, location, etc.

"Roles & Permissions" are preconfigured, to assign appropriate permissions to the various roles that exist between the learner level and the administrator level.

"Masquerade" is a useful function, which allows you to view the platform exactly as a given user sees it while logged into their user profile. This is a helpful troubleshooting tool when providing support to your learners.

Now that you have reviewed this guide, you should have a high-level understanding of the Admin tools and functions accessible to you, and how to best navigate those tools and functions. For more information, or to watch the full "How-To" video, please visit **[https://texasmutualstg.wpengine.com/texas-mutual-help/].**