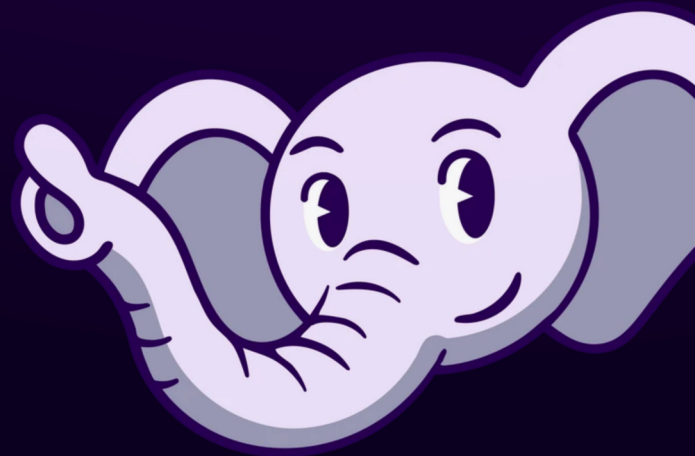




YOUR SELF-GUIDED QUICK START

Get Started with Empath Learn

About 30 minutes. No call required.

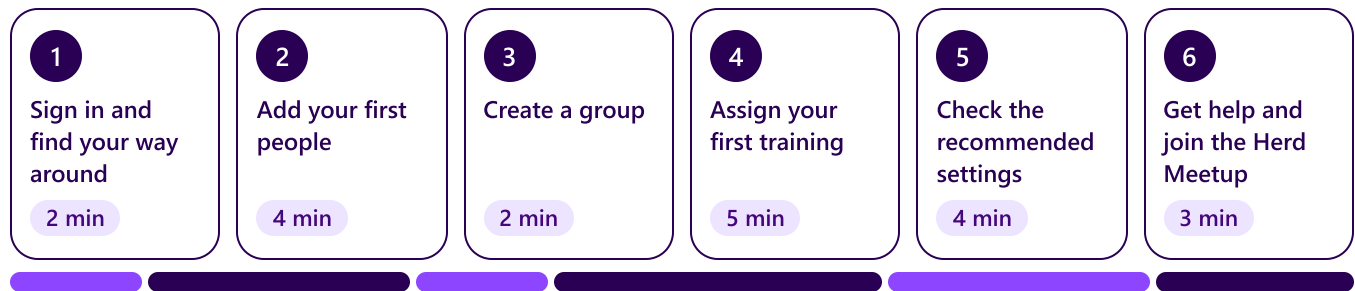


OVERVIEW

At a glance

Our goal is that your team gets real value out of Empath and keeps getting it long term. The steps below are built around the habits that have worked best for that, so it's worth doing them in order.

About 30 minutes. No call required. Work through the steps in order, or stop and pick it back up later. Each step stands on its own.



By the end you will have:

- ☐ signed in and found your way around
- ☐ invited at least five people
- ☐ created a group
- ☐ assigned your first training, with a due date
- ☐ looked at Empath's recommended settings
- ☐ found where to get help

TIP

Who this is for. Whoever is setting Empath up for your company. If the person who bought Empath and the person who will run training day to day are different people, do this together, or hand it to the person who will run training.

TIP

Prefer a person? You can book a guided onboarding call at any point. See "When to book a call" near the end of this guide.

Three things now will save you trouble later.

1. Let Empath's emails through

CAUTION

Ask whoever manages your email security or IT to allow this domain and sender:

Domain: `app.empathmsp.com`
Sender: `notifications@app.empathmsp.com`

Invitations and sign-in links come from that address, and filtered email is the most common early problem. Details are in [Comprehensive Domain & Service Whitelist](#).

2. Use Chrome or Edge

These are the [officially supported browsers](#).

3. Know how you sign in

You sign in at `app.empathmsp.com` with an emailed magic link, or with a Microsoft or Google work account. There are no passwords.

TIP

Good to know

- ☐ The email you sign in with has to match the email you were invited with.
- ☐ Personal addresses such as Gmail can use the emailed link only.
- ☐ The first time a company uses Microsoft sign-in, someone in your Microsoft account may need to approve the Empath app. If that happens, the emailed link works in the meantime.

More in [How to Log In to Empath](#).

If your company needs enterprise single sign-on (SAML), Empath sets that up with you directly. See [Single Sign-On \(SSO\) Setup for Empath](#) and book a call (see "When to book a call").

WORDS YOU WILL SEE

If you've never run a learning platform before, these are all the words you need.

Library

The full catalog of Empath courses. It's big, so this guide gives you a short list to start from.

Pathway

Several courses in a set order, like a project plan for learning.

Knowledge Check

A quiz. A short set of questions inside a course that checks people understood the material.

Member

Someone who learns. Typically an employee.

Admin

Everything a manager can do, plus account settings and creating new content.

Course

One topic, made of short lessons.

Assignment

Giving a person or a group a course, usually with a due date. By default, only assigned training counts toward a person's record and reports.

Group

A named set of people. Assign once to the group instead of person by person. (The screen is titled *Teams* in some places.)

Manager

Sees their team, adds and removes users, and manages training assignments and reporting.



🕒 Step 1 · about 2 min

Sign in and find your way around

- 1 Go to app.empathmsp.com in Chrome or Edge.
- 2 Enter the email you were invited with, then choose the emailed link, or sign in with your Microsoft or Google work account.
- 3 Look at the top of the screen. You should see three items: **Dashboard**, **Library** and **Admin**.

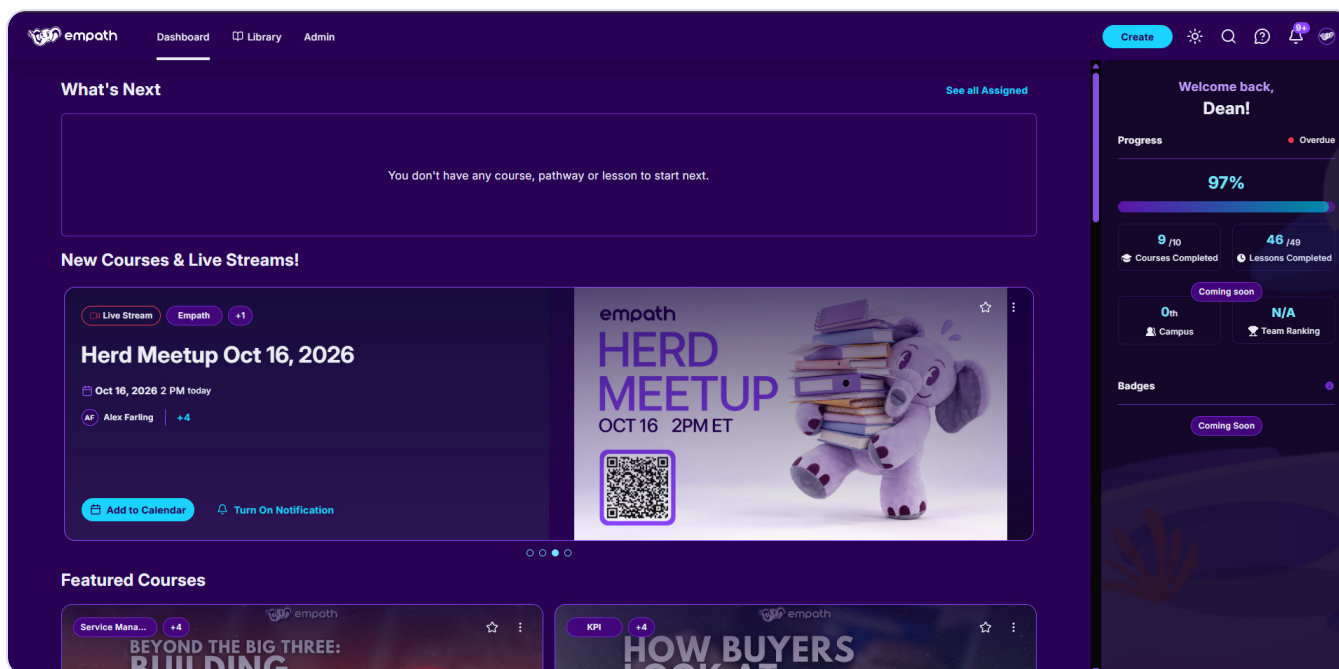
WHERE	WHAT IT'S FOR
Library	The training lives here. Browse and find courses, and assign them.
Dashboard	Your home view. It shows what's next for you, and reporting for your team.
Admin	Where you run Empath. The left menu has Dashboard and Learning Progress (how your team is doing), Members (add people), Groups (organize them), and a Company section with Account Settings and Notification Settings .

You'll use all of these in the next steps. Don't worry about learning them now.

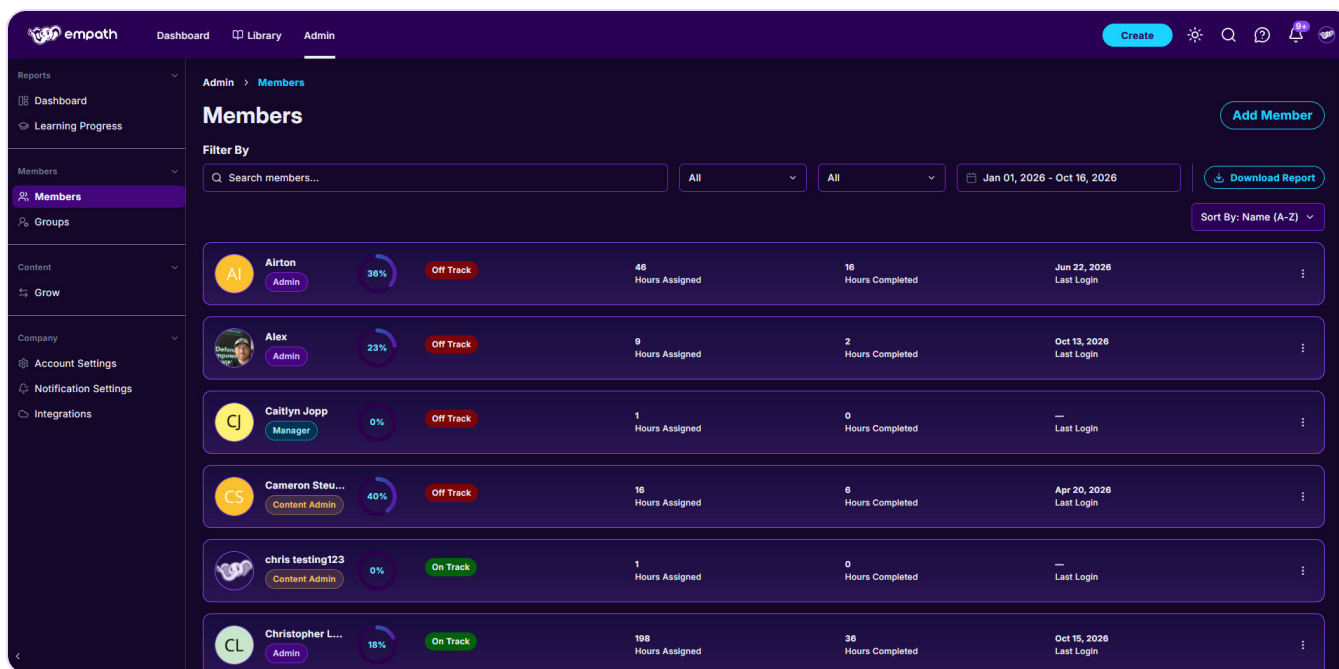
STEP 1 · CONTINUED

⚠ CAUTION

Don't see Admin? You're probably signed in with a Member role. Ask the person who set up your Empath account to change your role to Manager or Admin, then sign out and back in. If you're not sure who that is, [contact Empath support](#).



Dashboard, with Dashboard, Library and Admin across the top. Screenshot from Empath's Internal Demo Tenant.



Admin left menu and the Members screen. Screenshot from Empath's Internal Demo Tenant.

Knowledge Base: More on who sees what: [Member vs Manager and Admin Views in Empath](#).

2

🕒 Step 2 · about 4 min

Add your first people

🔄 HABIT NUDGE

Goal: invite at least five people now. Include a couple of people who aren't leadership, such as a team lead or a senior technician. A team made up only of leaders doesn't tell you much about whether Empath will work for everyone else.

- 1 Click **Admin > Members** in the left menu.
- 2 Click **Add Member**.
- 3 Enter the person's name and email. Use the exact address they will sign in with.
- 4 Pick their role:
 - **Member** for learners
 - **Manager** for team leads and anyone who will manage reporting and assignments
 - **Content Admin** for an admin or anyone who will create contentA person can have more than one role.
- 5 Leave **Assign Content** blank. You'll assign training in Step 4, where you can set a due date.
- 6 Click **Send Invite**. The person gets an email from `notifications@app.empathmsp.com`.

Repeat for at least five people.

Have more than five people? Invite five by hand now so you see how it works. Then use **Import CSV** in the same window for everyone else. Download the template, fill in these columns, and upload it after you finish this guide:

```
name,email,roles
Jordan Lee,jordan@example.com,member
Sam Rivera,sam@example.com,manager
```

Want to build your own content? It's possible, and it's a good project for a Content Admin. You can upload your own content, embed outside content (the YouTube import tool makes that easy), and edit content already on the platform. It isn't part of this quick start. The [Learning Manager section](#) of the Knowledge Base has up-to-date instructions.

⚠ CAUTION**Good to know**

- **Send the invitations before anyone tries to sign in.** Someone who signs in without an invitation creates a separate account that only Empath Support can remove.
- **Use work email addresses.** Personal addresses such as Gmail can use the emailed link only.
- **To resend an invitation,** open the three-dot menu on the person's row and choose **Resend invitation email**. This only works for people who have never signed in.
- **Deactivate** stops someone signing in but keeps their training data, and it doesn't free their seat. **Delete** is permanent and frees the seat.

The Add Member window (titled Invite User). Screenshot from Empath's Internal Demo Tenant.

Knowledge Base: [How to Add or Remove Members in Empath](#)

3

⌚ Step 3 · about 2 min

Create a group

Groups let you assign training to a set of people at once, and see progress by team.

- 1 Click **Admin > Groups** in the left menu. The screen may be titled *Teams*.
- 2 Look at the **All** group. Empath creates it automatically and keeps everyone in it. **Don't rename it.**
- 3 Click **Create** and name a group after the team you want to start with, such as **Service Desk** or **L1**. If you're not sure, call it **Test group**. You can rename it later.
- 4 Open the group, click **Add Members**, and pick the people you just invited.

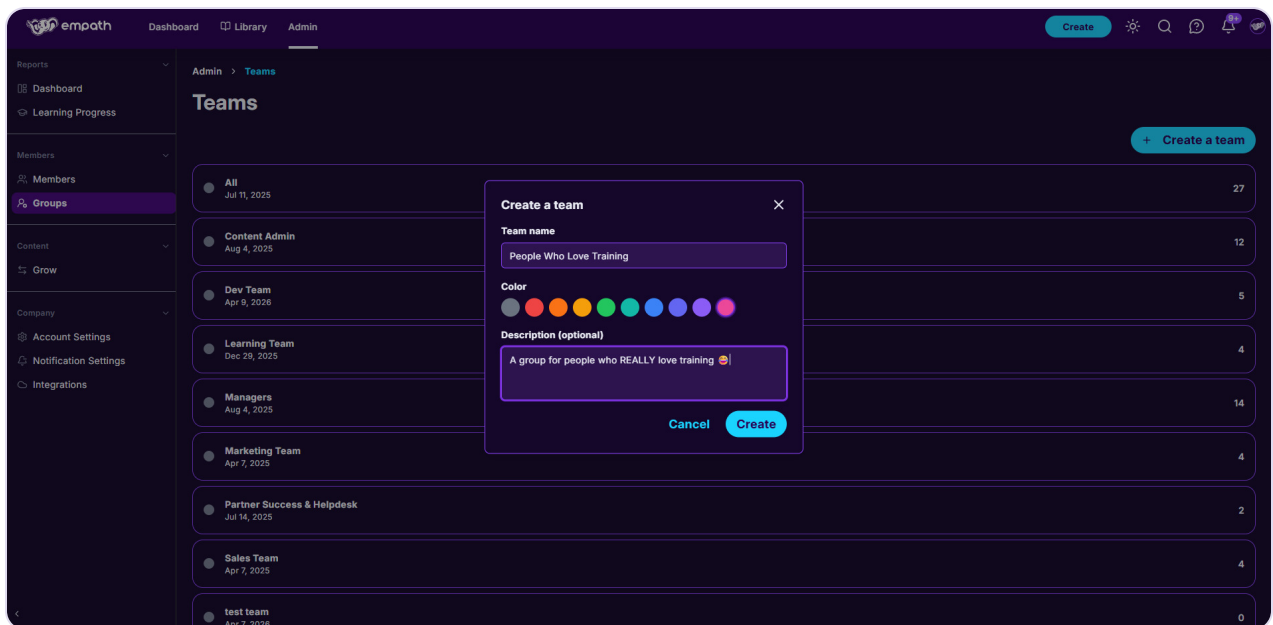


STEP 3 · CONTINUED

A person can be in several groups at once. Someone can be in All, in a team group, and in a level group like L1. Think of it as layers.



Start with one group. A focused first group tends to finish more training than "everyone at once," and more groups make reports harder to read. You can add more later.



The Groups screen (titled Teams) and the Create a team window. Screenshot from Empath's Internal Demo Tenant.

Knowledge Base: [How to Create and Manage Groups in Empath](#)

4

Step 4 · about 5 min

Assign your first training

This is the step that makes Empath work. Training that is assigned, with a due date, gets finished. Training that's just sitting in the Library mostly doesn't. Do this step now, not later.

The Library is big, and most people feel overwhelmed the first time they open it. So don't browse. Pick from this short list of popular starter courses. Assigning one is also the quickest way to see how assigning works, how finding things works, and what Empath's content looks like.

FOR	COURSE
Anyone who will be a Manager or Content Admin	How to Use and Administer Empath
Anyone serious about managing Empath	So You're a Learning Manager
Leadership	Achieving Results on Repeat: The Expectation Flywheel (Kyle Christensen)
Revenue and sales	Selling AI Transformation as a Service (Tim Hickel)
Technical staff	Time Tracking: What Every MSP Employee Needs to Know
Anyone, or you're not sure	New MSP Employee 101: The Essentials for Everyone

These are courses, not pathways. If you bought Empath mainly to train new employees, assign the **T1 Pathway Template: Express Edition** (about 10 hours, beginner level) instead.

STEP 4 · CONTINUED

How to assign

- 1 Open **Library**.
- 2 In the filters on the left, scroll to **Publisher** and select **Empath**. This limits the Library to Empath's own core content.
- 3 Scroll down to **More filters**, open it, choose **Content type**, and select **Course**.
- 4 Search for the course by its exact name.
- 5 Click the course card, then click **Assign Course**.
- 6 Choose a **group**, or click **Select Members** to pick individuals. Assign it to the people you invited.
- 7 Set a **due date no more than two weeks out**.
- 8 Confirm, then check **See Assigned** to see your assignment.

TIP

Why only assigned training counts. Empath's suggested best practice is that managers assign content, and that is how your account is set up by default. Only assigned content counts toward a person's record and reports, so someone browsing the Library on their own gets no credit.

HABIT NUDGE

Start small. One or two courses per person is plenty for now. You'll build from there once people are in the habit.

Knowledge Base: [How to Assign a Course in Empath](#) and [How Does Assignment and Progress Tracking Work?](#)

5

Step 5 · about 4 min

Check the recommended settings

Empath has settings that control what your people see and what notifications they get. You don't need to understand all of them today. The point of this step is to set Empath's recommended starting settings, and to show you that these settings exist, that they're documented, and that you can change them any time.

⚠ CAUTION

You need an admin-level login to see these. If you can't see them, ask whoever set up your account.

Notification Settings

Open **Admin > Notification Settings** in the **Company** section.

Notifications are controlled in two places. You set company-wide defaults here and can lock them. Each person can adjust their own settings under **My Account**, but can't override anything you've locked.

Under **Notification types**, set these:

SECTION	SET TO
Learner rows (assigned training, due dates, overdue, completions, new courses)	In-app on, email on, delivery Recommended , audience People it's about
Manager rows, in general	In-app audience Managers & admins ; email delivery Recommended , audience Managers & admins
At-risk team alerts	Email delivery Immediate , audience Managers & admins . Lock it.
Coaching prompts	In-app audience Managers & admins ; email delivery Digest , audience Managers & admins . Lock it.
Low adoption alerts, content authoring, account and system alerts	Leave as they come

At the bottom of the screen you can **pause all notifications**. It's good to know it's there.

Knowledge Base: [How to Find Tenant-Level Admin Settings in Empath](#) and [Notification settings: an overview](#)



STEP 5 · CONTINUED

Learner Controls

Open [Admin > Account Settings > Learner Controls](#). This tab only shows for the account owner or an admin. Set it to Empath's recommended configuration:

SETTING	SET TO
Hide unassigned content	✓ On
Hide non-subscribed premium catalogs	✓ On
Allow background-tab playback	✗ Off
Allow seek-ahead	✗ Off
Allow extended playback speed	✗ Off
Allow self-assignment	✗ Off

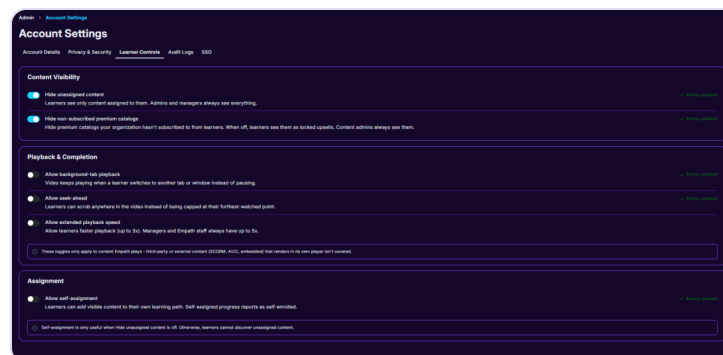
These are Empath's recommended settings. Each one is explained in the Learner Controls article below, and you can change any of them later.

TIP

Why some catalogs are hidden: Empath hides premium catalogs you don't have yet, so your team's Library stays focused. Admins and Content Admins can still see everything.

Take a quick look at reporting

Under [Admin](#), open **Dashboard**, then **Learning Progress**. You can choose a date range on the Dashboard and click **Download Report** for a CSV or PDF. Nobody has trained yet, so there won't be much to see. These reports fill in as your team trains.



Account Settings, Learner Controls tab. Screenshot from Empath's Internal Demo Tenant.

Knowledge Base:

- [Learner Controls in Empath: What Each Setting Does and How to Configure Them](#)
- [How to Use the Learning Progress Dashboard in Empath](#)

6

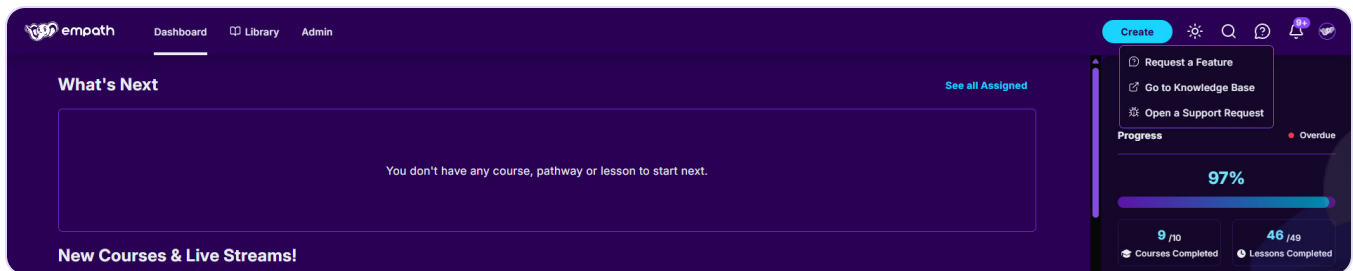
Step 6 · about 3 min

Get help and join the Herd Meetup

Know where help lives

Click the  icon in the top right of the app. You'll see **Request a Feature**, **Go to Knowledge Base** and **Open a Support Request**.

Support is staffed by people, not AI, so ask questions. Nobody minds. You can also email support@empathmsp.com. More in [How to Get Help and Support in Empath](#).



The ? menu in the top right of the app. Screenshot from Empath's Internal Demo Tenant.

Put the Herd Meetup on your calendar

The Herd Meetup is Empath's monthly partner call, where Empath shares feature updates and asks for your feedback. We recommend joining once or twice early in your rollout.

- 1 Go to **Library**, open the **Content type** filter and choose **Live streams**.
- 2 Sort by **newest**. The next Herd Meetup should be at the top.
- 3 Open it and use **Add to Calendar**, or assign it to the people who should attend.

Knowledge Base: More on how live sessions work: [How do Live Streams and Recorded 'Live' Streams Work?](#)



Where to go next

You're set up. A setup turns into a habit when training looks like the rest of the work.

- **Check that people got in.** Within the first week, open [Admin > Members](#) and confirm your invited people have signed in. Resend invitations to anyone who hasn't.
- **Make training look like work.** Most people in an MSP will pick a fire over a training module every time, so give training the same structure as everything else: a recurring training ticket in your PSA, on the same day and time each week, for 30 to 60 minutes, with real time entry and notes. Expect about five weeks in a row before it feels normal. See the [Recurring Training Ticket PSA Guide](#).
- **Let a manager decide when training gets skipped.** If a client emergency bumps a session, a dispatcher or manager says so, instead of the technician quietly skipping it. That keeps "my job is training unless someone tells me otherwise" true.
- **Notice the first win quickly.** When someone finishes their first course, say so in Teams or Slack that day, and tie it to something your company cares about, like accountability. Small, fast and public works better than big and late. Start with one value and one skill. See [How to Reinforce Training Behavior Using the MSP Dopamine Loop](#).
- **Hold off on adding more.** Add courses, groups and features once people have started the first course.
- **Come to a Herd Meetup.** Once or twice early on is plenty.

When to book a call

Nothing here is a test. Book a call whenever it would help.

IF YOU WANT TO...	DO THIS
Ask questions after you've tried this guide	Book a strategy session
Be walked through the setup from step one	Book a guided onboarding call
Set up single sign-on, or build your own content	Book a strategy session and say so

Book a call, or open a support ticket: support@empathmsp.com

Keep training, keep learning, keep growing your herd.



Troubleshooting

PROBLEM	LIKELY CAUSE	WHAT TO DO
Invitation email never arrives	Your email filter is blocking <code>notifications@app.empathmsp.com</code>	Ask your IT team to allow that sender (see the Domain & Service Whitelist article), then resend from the three-dot menu on the person's row.
Microsoft or Google sign-in fails	The sign-in email doesn't match the invited email, or Microsoft needs an admin to approve the Empath app	Sign in with the exact invited address, or use the emailed magic link instead.
Magic link doesn't work	Opened in a different browser, or expired	Request a new one on the sign-in page and open it in Chrome or Edge.
You don't see Admin at the top	You're a Member, not a Manager or Admin	Ask your admin to change your role in Admin > Members , then sign out and back in.
"A user with this email already exists"	The person is already in your account, signed in before being invited, or belongs to another company	Email <code>support@empathmsp.com</code> with the address. Only Empath Support can clear a stray account.
"Identity provider request failed" when adding someone	Your account has reached its seat limit	Email <code>support@empathmsp.com</code> . Don't keep retrying.
You invited someone with the wrong email	Emails can't be edited in the app	Invite the right address, and email <code>support@empathmsp.com</code> with both addresses.
A course doesn't show for someone	It hasn't been assigned to them, or unassigned content is hidden (the recommended setup hides it)	Assign it from the course card in the Library.
You can't see Learner Controls or Notification Settings	These need an admin-level login	Ask your account owner or admin.

If the fix isn't here, open a support request from the  menu, or email `support@empathmsp.com` with your company name, the user's email, what happened and what you expected.

Helpful articles

Keep these handy while you work through the steps.

SIGNING IN AND SETUP

Signing in	How to Log In to Empath
Supported browsers	Which Browsers Are Officially Supported by Empath?
Invitation emails not arriving	Comprehensive Domain & Service Whitelist
Single sign-on (SAML)	Single Sign-On (SSO) Setup for Empath

PEOPLE AND TRAINING

Adding and removing members	How to Add or Remove Members in Empath
Groups	How to Create and Manage Groups in Empath
What members see versus managers and admins	Member vs Manager and Admin Views in Empath
Assigning a course	How to Assign a Course in Empath
Why only assigned training counts	How Does Assignment and Progress Tracking Work?

SETTINGS AND REPORTING

Finding the admin settings	How to Find Tenant-Level Admin Settings in Empath
Learner Controls	Learner Controls in Empath: What Each Setting Does and How to Configure Them
Notifications	Notification settings: an overview
Seeing who finished	How to Use the Learning Progress Dashboard in Empath

CONTENT, HABITS AND HELP

Knowledge Checks (quizzes)	How to Create a Knowledge Check (Quiz) in Empath
Creating content	Creating Content in Empath: Understanding Lessons, Courses, and Pathways Creating a Course in Empath Using the YouTube Playlist Import Tool Learning Manager section
Herd Meetup and live streams	How do Live Streams and Recorded 'Live' Streams Work?
Building a training habit	Recurring Training Ticket PSA Guide How to Reinforce Training Behavior Using the MSP Dopamine Loop
Getting help	How to Get Help and Support in Empath