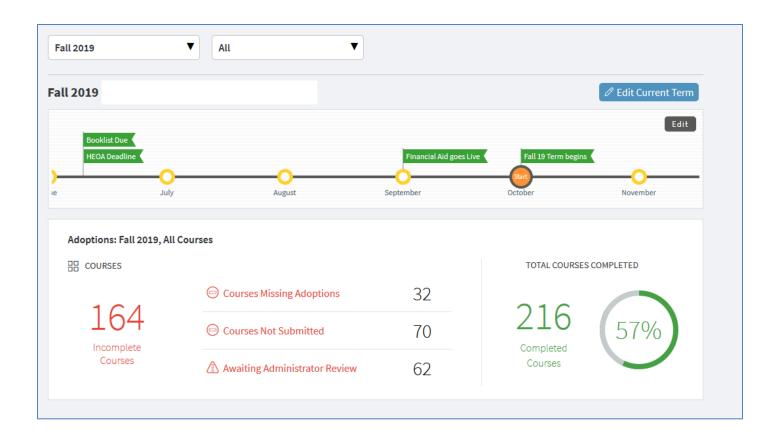
# AKADÉMOS Adoption & Analytics Portal



User Guide: Administrators

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## Introduction

Welcome to the Akademos Adoption & Analytics Portal – a software platform that's part of our Online Bookstore service designed to make the adoption of textbooks and course materials easier and more valuable for the entire campus community.

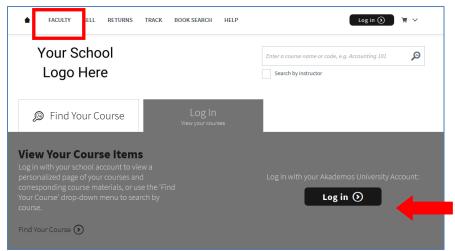
#### Key benefits include:

- Time savings and improved productivity for Faculty and Administrators
- Streamlined communication: the Portal replaces multiple email chains
- Access to course history and a recommendation tool highlighting additional options
- Transparency and clarity around course materials pricing and process deadlines
- Enhanced reporting and analysis for Administrators

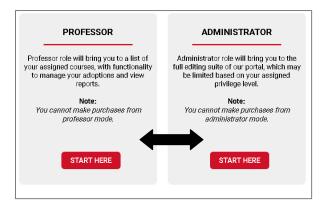
This document reviews how Administrators can use the Portal to set up a term, add and review adoptions, contact Faculty, and view reports. Key features will be highlighted along the way.

# **How to Access the Adoption & Analytics Portal**

To access the Adoption & Analytics Portal, visit the Online Bookstore website. You can either click the "Faculty" button on the top of the page or the "Log in" button to access your account. Then, log in using your Administrator username and password (these should be the same credentials you use to log in to your school's system) or the credentials provided to you by your Client Success Manager.



- \*\*If you have administration rights to the Bookstore and are also a faculty member or a student, you will be asked to select which account you want to review after you log in with your school account.
- \*\* Administrators will only have access to view and edit courses within the term, campus, and departments assigned to them. For example, a global Administrator will be able to edit all courses and term information, while department chairs will only have the ability to view and edit courses within their respective department.



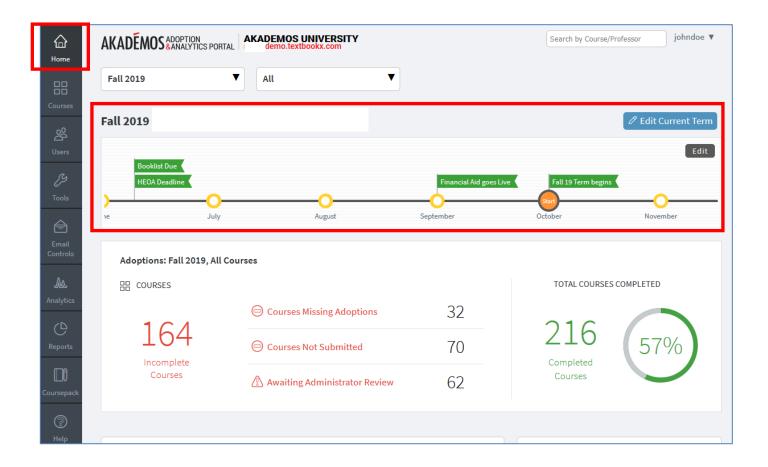
# Part 1: Term Setup

Since your school has integrated with the Online Bookstore, a lot of crucial information for each term will automatically be pulled into the Adoption & Analytics Portal. This information is sent daily, but can be increased during key points of the term (ex. during a time when Faculty are frequently assigned or removed from courses close to the start of the term).

#### Information sent via Integration:

- **Course list** The full course list (including course names, codes, departments and campuses will be pulled from your course registration system into the Portal.
- **Term start and end dates** The first and last day of the term will be pulled from the course registration system into the Portal.
- **Users** Faculty accounts will be pulled directly from your school's information system into the Portal. Faculty course assignments will align with the information pulled from the course registration system. When Faculty log in, they will only have access to view and edit the courses assigned to them.

While Administrators will not be able to edit information being pulled directly to the site, there are other key features that will need to be set up for each term on the Home page.



#### **Edit Current Term & Timeline**

At the top of the Home page there will be a timeline for the upcoming term. It is important for the Global Administrator, in consultation with their Akademos Client Success Manager, to determine and then add key dates and milestones so Faculty can easily reference deadlines. You can drag and move the timeline to display prior or future events within the term selected.



#### Click "Edit Current Term" to add the following:

- Faculty Portal Open Date
- Adoption Due Date
- Student Bookstore Open Date

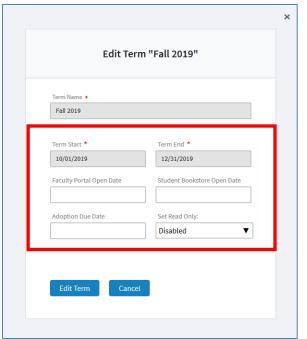
Once these key dates are entered, they will trigger email reminders to Faculty and other Users that are assigned to enter in course material adoptions.

Administrators and Client Success Managers can put the Portal into "Read Only" mode so that Faculty can review but no longer make changes to their courses. This is done to ensure that any late or last-minute adoption changes can be closely monitored and approved.

#### To edit the timeline, click "Edit"

We recommend adding the following dates to the timeline:

- HEOA deadline
- Booklist due date for Faculty
- Bookstore launch date (when the bookstore opens for students)
- Financial aid launch and close dates (if applicable)

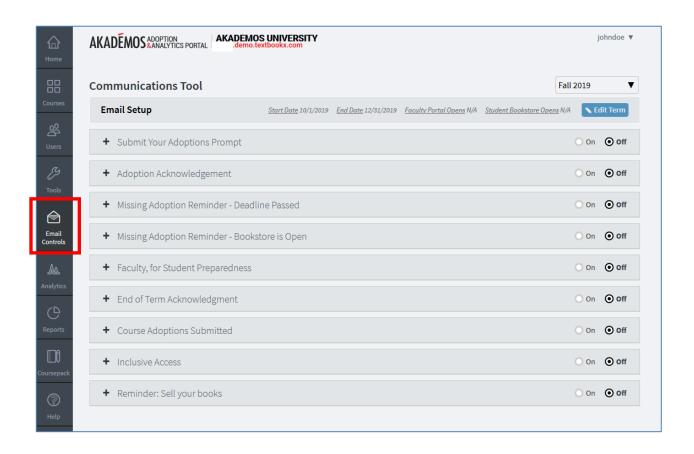


ilestones:		
HEOA Deadline	No Triggered Events	▼ 06/10/2019 × Delete
Booklist Due	No Triggered Events	▼ 06/10/201! × Delete
Financial Aid goes Live	No Triggered Events	▼ 09/01/201! × Delete
Fall 19 Term begins	No Triggered Events	▼ 10/01/201! <u>× Delete</u>
dd New Milestone		
Event Title	No Triggered Events	▼ 02/15/2020

#### **Set and Schedule Emails**

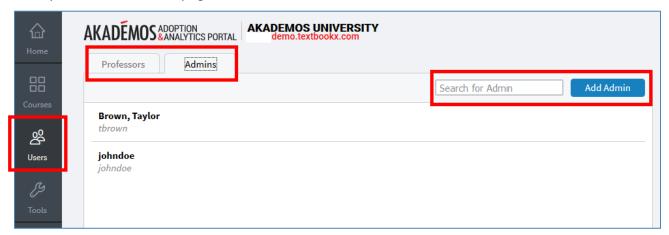
Akademos Client Success Managers and Global Administrators can choose to turn on email reminders that go out to Faculty or other Users reminding them to submit course material adoptions. Each email has a trigger send date based on the dates entered in the "Edit Current Term" feature. If those dates are not entered into the Portal, the emails will not generate.

While each email has a default send date, you can change that date and select a different one.



#### **Edit Users**

While Administrators cannot edit User information that is automatically pulled into the Portal, they can visit the Users page to view account information or add, remove, and edit other Admins.



To view User details, click on the User's name and a pop-up will appear.

When viewing Faculty, all courses assigned to them will be listed beneath "Assigned Courses."

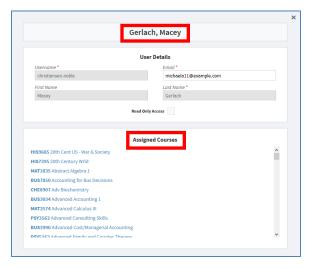
Administrator details will display what level of access the User has (i.e. what departments are assigned to their account).

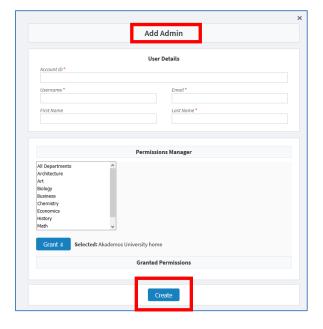
To add an Administrator, switch to the Admin tab and click the blue "Add Admin" button. Enter all User details, including:

- Account ID
- Username
- Email
- First Name
- Last Name

Next, use the drop-down menu to select all terms and departments that should be assigned to the User. The new User will only have access to view and edit courses selected under their assigned departments.

Once you have added all the User details, click "Create" to add them to the system.





# **Part 2: Adoptions**

Administrators can review and edit adoptions or add their own adoptions to a course. Changes and updates made to a course will be saved in real time.

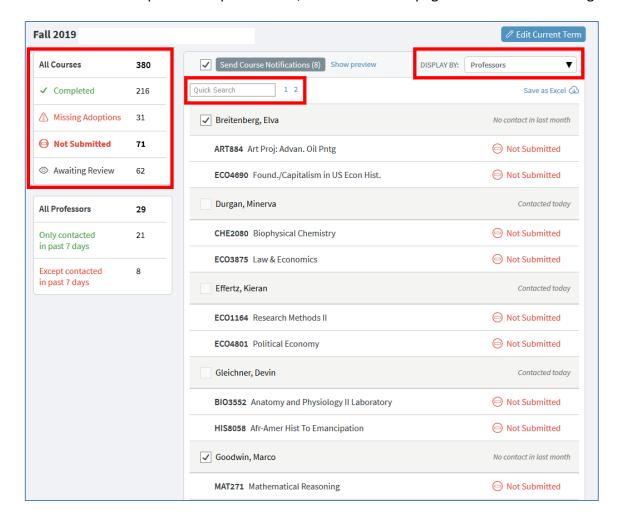
# **Review Status of Faculty Adoptions**

As an Administrator, you may be in charge of reviewing and approving adoptions. On the Home page you will see an overview of how many courses need to be approved.

\*Many schools do not require that an Administrator approve adoptions. You can ask your Client Success Manager to adjust the Portal so that "Awaiting Review" is turned off.



For a more detailed report of adoption status, visit the Courses page on the left-hand navigation.



#### **Adoption Results:**

Administrators will see results for all terms and departments assigned to them. For example, a Global Admin will see all departments within a term, while a Department Chair will only see the courses within their department. Results can be displayed in one of two ways: grouped by professors (default) or grouped by courses.

Use the search bar at the top of the page to search for a particular instructor or course.

The panel on the left side of the screen allows you to filter by adoption status:

- All Courses (default): Results include all courses assigned to the term selected in the top drop-down menu
- Completed: Results include courses where adoptions have been submitted by Faculty and (when applicable) approved by Administrators
- Missing Adoptions: Results include courses where Faculty have not yet started the adoption process
- Not Submitted: Results include courses where Faculty began the adoption process, but did not complete it.
- Awaiting Review (when applicable):
   Results include courses where Faculty have submitted their adoption, however Administrators have not yet reviewed and approved the adoption

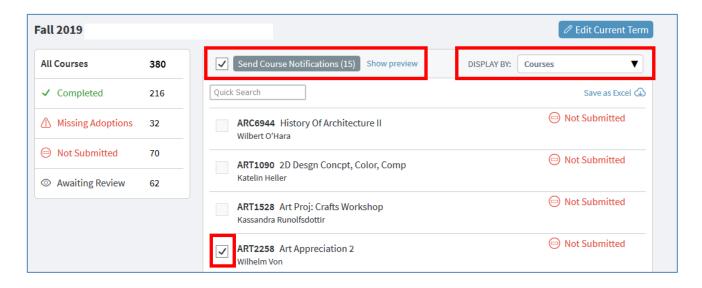
All Courses	380
✓ Completed	216
Missing Adoptions	32
○ Not Submitted	70
<ul> <li>Awaiting Review</li> </ul>	62
All Professors	31
Only contacted in past 7 days	23
Except contacted in past 7 days	8

# **Contact Faculty**

The Course page can also be used by Administrators as a communications module to email Faculty members. Emails will be sent to the Faculty member's email address on file, and will appear in the Adoption & Analytics Portal the next time they log in.

Administrators can use the filters to select the Faculty they want to notify. For example, to notify all Faculty who have not yet submitted their adoptions, click the "Not Submitted" filter on the left side of the page. Select all Faculty in the results by clicking the top checkbox, or select individual Faculty one by one.

Once an eligible Faculty member has been selected, a "Send Course Notifications" button will appear. Click that button to send an email. Note, the Portal will not allow you to email anyone who has been notified within the past 24 hours regarding the course(s) displayed.



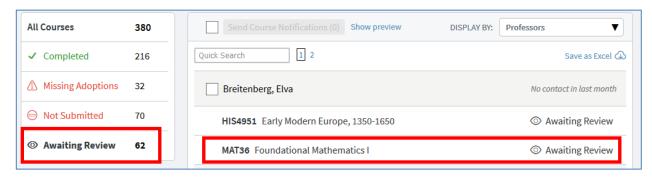
#### There are two standardized emails that can be sent to Faculty:

- Course View Email: If you click "Send Course Notification" when results are displayed <u>by courses</u>, the professor will get a unique email for each course that appears in the search results. For example, the professor may receive two unique emails; each email would be specific to one of their two incomplete courses.
- Multi-Course Email: If you click "Send Course Notification" when results are displayed <u>by professor</u>, the professor will get an email that lists the adoption status for all courses assigned to them for the designated term. For example, the professor will receive one email with all four of their courses listed, along with the adoption status of each (incomplete or complete).

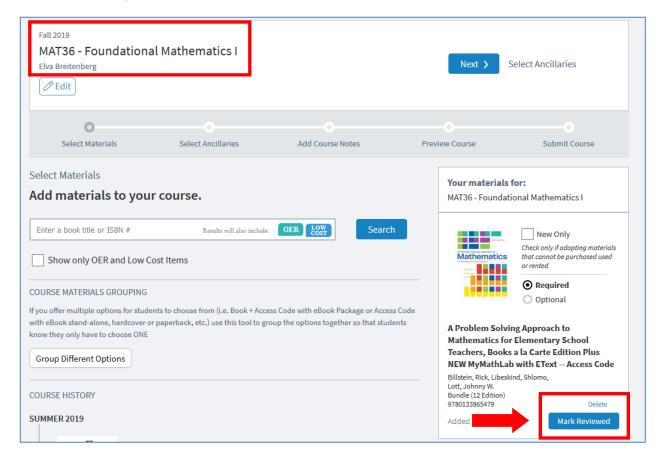
In both cases, the email will provide a snapshot of what Faculty see when they log in to the Portal. Links will direct them to the designated location where they can fix any outstanding issues. A copy of all emails sent will appear in the "Notifications" section of your Home page.

# **Approve Adoptions**

If your school requires that course materials adoptions be approved by an Administrator, click the "Awaiting Review" filter on the Courses page. Then click the course you want to approve.



On the right side of this page, you will see a list of all books adopted to that course. If no changes need to be made, click "Mark Reviewed" for each book.



If you want to delete a book from the course, click "Delete" located above the review button.

After reviewing every book assigned to the course, you can:

- · Click "Next" to review ancillaries, course notes, and course files associated with that course
- Click back to the Courses page to go to the next course that needs your review

## **Add Adoption to a Course**

Administrators can submit adoptions and set up a course in the same way Faculty can. For example, Administrators may need to submit course adoptions for a class being taught by an Adjunct Professor. Whatever the reason, Administrators can navigate to the course adoption process from the Courses page. Simply click on a course name to begin the adoption process.

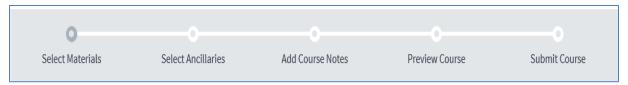
On the course page you will see term, course, and instructor name. All course information is pulled directly into the Portal and cannot be edited by Administrators or Faculty.



#### The steps of the Adoption process:

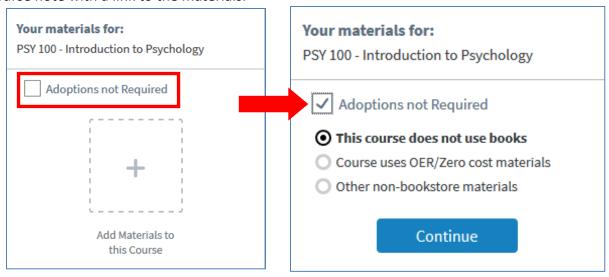
All steps of the adoption process are listed on top of every page so you can track where you are.

- Step 1: Select Materials adopt textbooks or choose "Adoptions not Required"
- Step 2: Select Ancillaries (optional) add supplemental materials to your course
- Step 3: Add Course Notes (optional) add course notes and/or files to your course
- Step 4: Preview Course view what your course will look like to students
- Step 5: Submit Course submit your adoptions



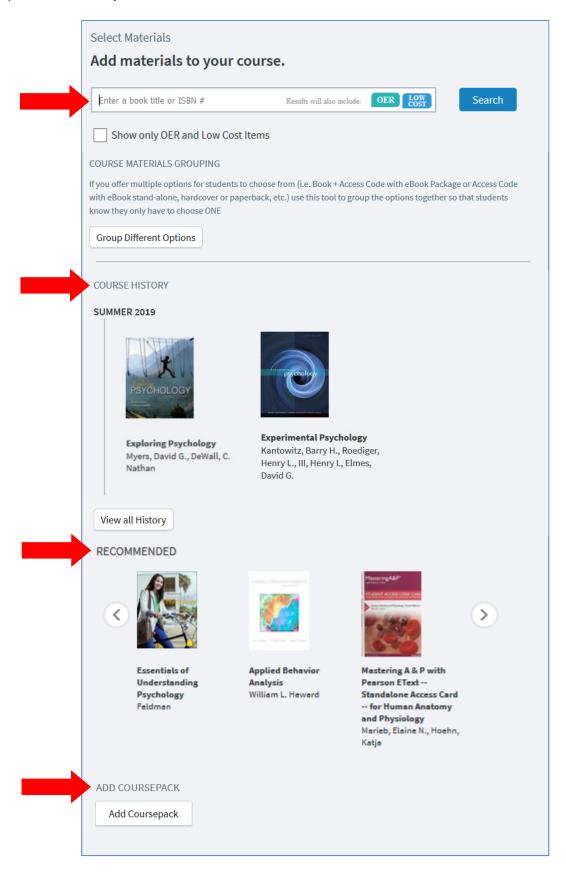
#### **Adoptions not Required**

If the course does not require textbooks, check the box, "Adoptions not Required" and select the reason why. Then, click "Continue" to finish submitting. When students visit the bookstore, they will see messaging saying that they do not need to purchase materials for this course. You can add an additional note if you like. For example: if you are using Open Educational Resources, like OpenStax, you can choose the "Course uses OER/Zero cost materials" below and then add a course note with a link to the materials.

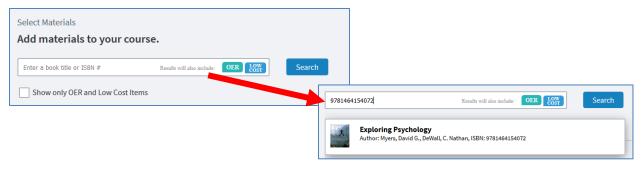


## **Step 1. Adopt Course Materials**

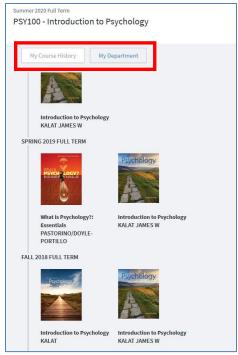
If the course does require textbooks, use the (1) search box, (2) course history, or (3) recommendation engine to adopt or re-adopt course materials. You can also choose to create a (4) custom Coursepack.



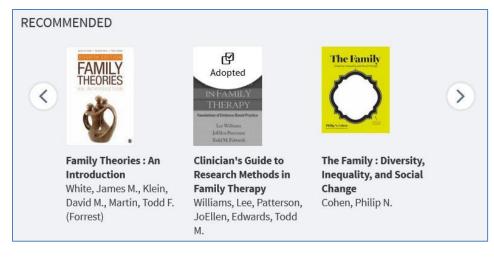
1. **Search Box**: Enter an ISBN or book title in the search box. As you type, a list of books will appear. If an ISBN doesn't appear, contact your Client Success Manager to have it added to our system. You can choose to check the box "Show only OER and Low Cost Items" if you would like to limit search results to materials within those two categories. The Low-Cost indicator defaults to any item that retails for \$25 or less. Contact your Client Success Manager if you would like to adjust these parameters.



2. History: Books that were selected for this course in previous terms will automatically appear. Using the history option is the fastest way to re-adopt textbooks. Click "View All History" to view all books assigned to this course in prior terms. Or click "My Department" to view adoptions made by other faculty for the same course.

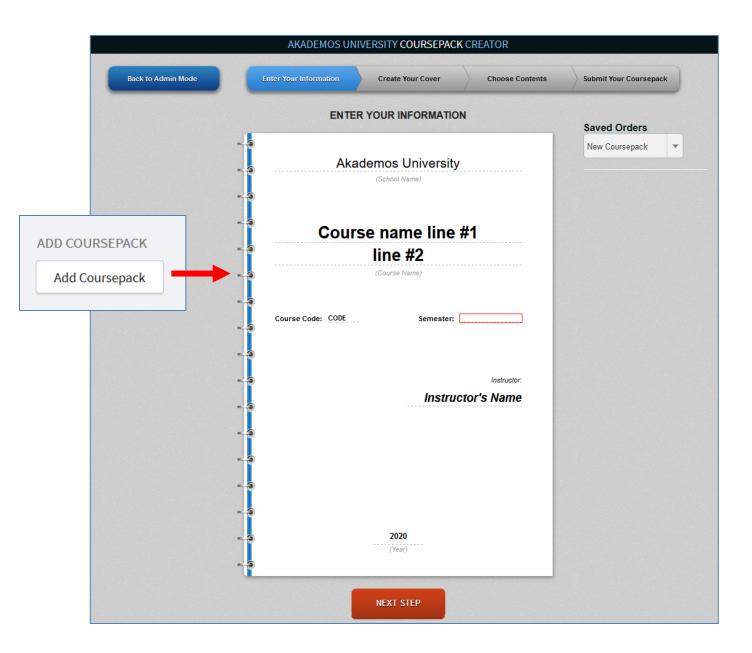


**Recommendations**: During the adoption process, Faculty can be shown recommended items based on the subject category of the course selected. Contact your Client Success Manager to discuss adding specific materials, such as study guides, graphic calculators, or lab coats.

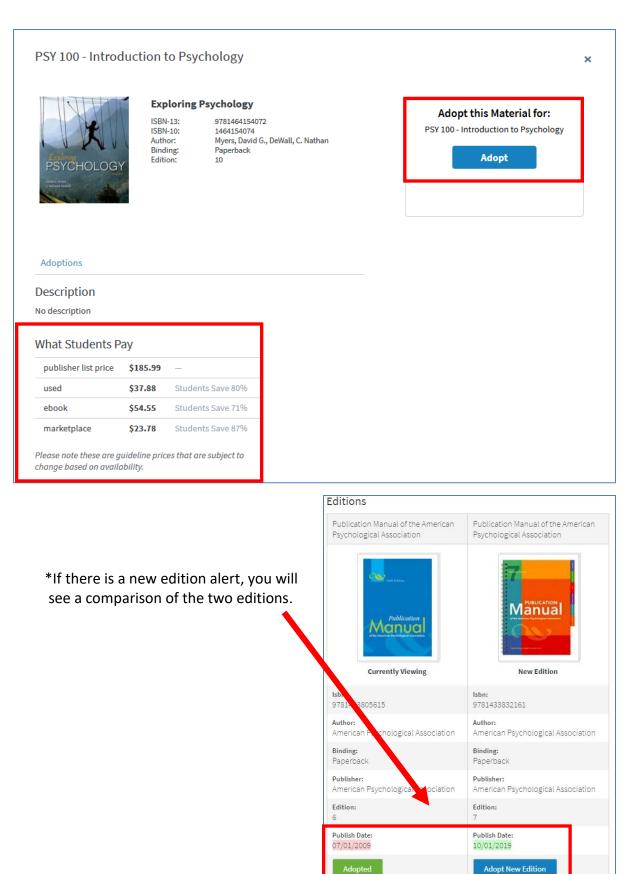


4. **Coursepack**: Coursepacks are a great way to build custom materials for a course and save your students money. Selections from books, articles, magazines and other literature, in addition to course notes, PowerPoint slides, course syllabus, and other handouts may be combined into one Coursepack. Many instructors take advantage of this low-cost option.

Akademos partners with CoursePacks etc. to create coursepacks. When you click the "Add Coursepack" button you will be taken to the CoursePack creation tool in a separate window. Follow the process to create your custom Coursepack and then add it to your course. For more information on Coursepacks, see separate handout.



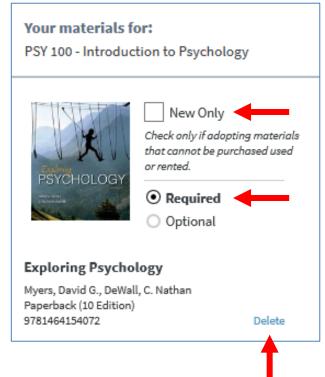
**Selecting a textbook for a course:** Once you select a textbook, you will be taken to the book detail page, complete with bibliographic information, pricing details, and edition alerts. The pricing section offers real-time information, which is subject to change based on availability and sourcing.



After reviewing textbook details, click "Adopt" and it will be added to the course. By default, the textbook will be listed as "Required" and all available formats will be listed for sale (new, used, eBook, rental, Marketplace).

- Required vs. Optional: If students are not required to purchase the book, you can list it as "Optional" instead.
- **New Only:** Select "New Only" if any of the following apply:
  - You created a custom book, bundle, lab manual, or workbook
  - You're using a book that requires an access code
- \* IMPORTANT: "New Only" means that the bookstore will only list new versions of the textbook for students to buy because used, eBook, rental, & Marketplace options do not come with access cards or customization.

If you decide that you no longer want to adopt that textbook, click "Delete."



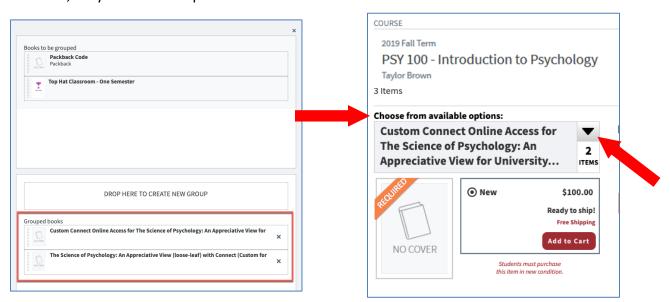
\*To add another textbook to the course, repeat the process.

After adding all course materials, click "Next" at the top of the page.

#### **Course Materials Grouping:**

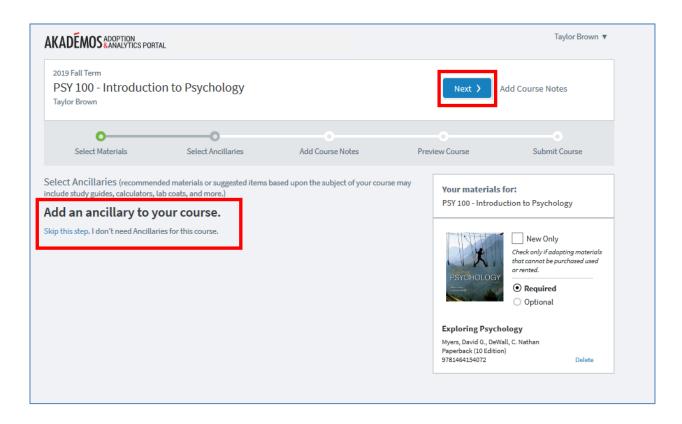
If you offer multiple options for students to choose from, such as a textbook and Access Code with eBook Package, or Access Code with eBook stand-alone, use the "Course Materials Grouping" tool to combine the options together so that students known they only have to choose ONE.

To group materials, click "Course Materials Grouping." The textbooks already added to the course will appear. You can then drag and drop materials into a group. When a student visits the bookstore, they will see a drop-down arrow that shows them their different choices.



## Step 2. Add Ancillary Materials (Optional)

Ancillary materials such as study guides or other materials related to the course materials you have adopted may appear as a recommendation on this page. You can choose to add them to the course or simply skip this step by clicking on "Next." If you have ancillary materials that you would like to add to the Portal's system, contact your Client Success Manager.

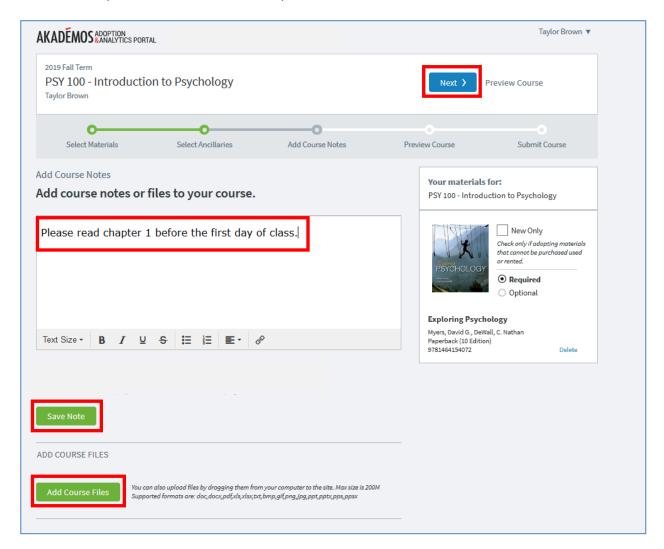


#### **Step 3. Add Course Notes (Optional)**

You can add a note to the course during this step.

For example, if you want students to read the first chapter of a textbook before the first day of class, you can indicate that during this step and it will be displayed to students when they are viewing the course at the Online Bookstore.

You can also upload files such as a class syllabus.



After typing a course note, click "Save Note" to add it to the course listing.

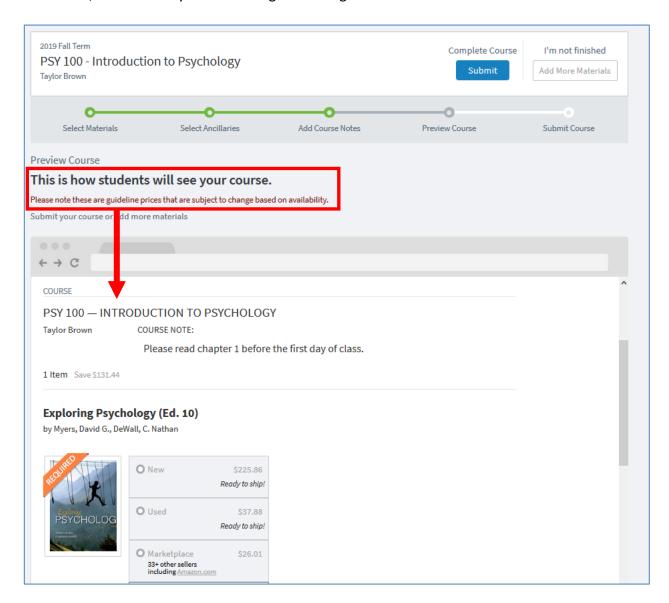
If you want to add course files like a syllabus, PPT slides, or handouts, click "Add Course Files" to select the file from your computer. Click the pencil next to the file name to edit how the file is displayed to students.

Once all course notes and files have been added, click "Next" at the top of the page.

## **Step 4. Preview Course**

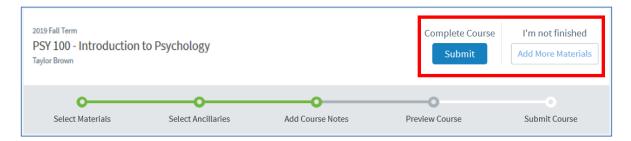
The course preview page will show you what the course will look like to students when they are shopping at the Online Bookstore.

**Note:** Pricing and availability of course materials are subject to change. For example, if you recently added a new book, it may appear as out of stock or on backorder. Once the adoption is submitted, our inventory team will begin sourcing all materials.

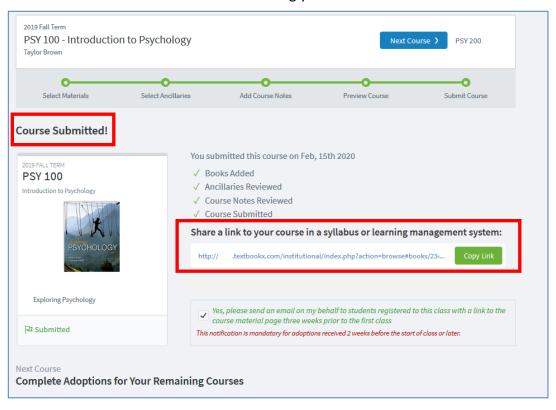


#### **Step 5. Submit Course**

If you need to add another textbook to the course, click "Add More Materials" to return to the first step. Once you have added everything, click "Submit" to complete your adoption for this course.



A confirmation page appears after you click submit, which includes a direct link to the course as it appears on the Online Bookstore. We encourage you to share the link when you communicate to students. You will also receive an email confirming your submission.



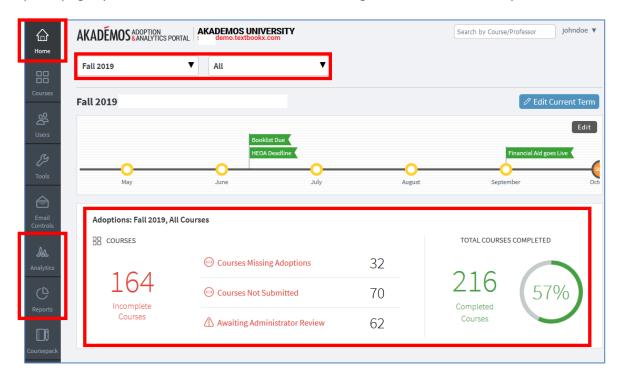
Multicourse Editor: The Portal will check if you are teaching more than one section of a course to allow you to apply the same adoption to them. Books, course notes, and files will be updated.



# Part 3: Reports

The Adoption & Analytics Portal has enhanced reporting capabilities for Administrators.

The Home page provides detailed information on adoptions and Portal activity. The Analytics and Reports pages provide information on student ordering behavior. All data is updated in real time.



# **Home Page Reports**

The Home page is the best way to get an overview of adoptions for the upcoming term.

Below the term's timeline, Administrators will see an adoption overview. Data will be shown for the term/department/course selected in the drop-down menu found at the top of the page. When you drill down to a specific department/course, all adoption statistics on the page will be updated.

The number of incomplete courses will be highlighted in red. There are three statuses that explain why a course is listed as "incomplete":

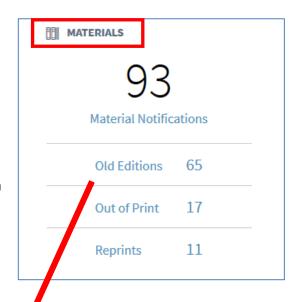
- Courses Missing Adoptions: Faculty have not yet added any materials to their course
- **Courses Not Submitted:** Faculty have added adoptions to their course, but have not yet submitted their adoptions
- Awaiting Administrator Review: Faculty have submitted their adoptions and an Administrator needs to review

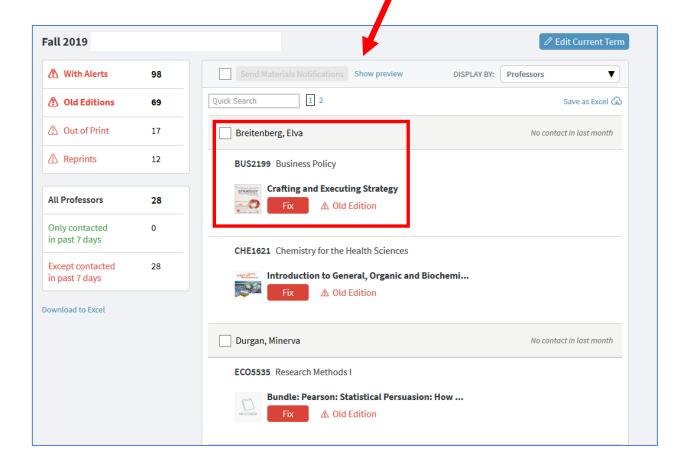
The number of courses with complete adoptions will be highlighted in green. These are the courses where Faculty have submitted their adoptions and they have been approved by an Administrator. If your school does not require an Administrator to review adoptions, once a Faculty member submits textbooks, it will immediately be listed as complete.

#### **Materials Notification:**

The "Materials" box, located next to the activity log, displays notifications from the Akademos inventory team. The number of submitted adoptions that are on backorder, out of print, or have new editions will be highlighted here.

Click on one of the notifications to review details. From this page, you can send messages to Faculty to let them know about the status and potential issues with their course material adoptions.

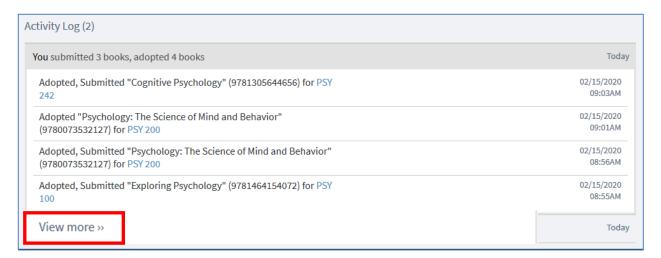




## **Activity Log:**

The activity log tracks all updates and changes made to courses tied to your account. Click on any activity to expand the full activity log. If you click "View more" at the bottom of the page, you will be able to search by ISBN, course, or User or select a date range to search.



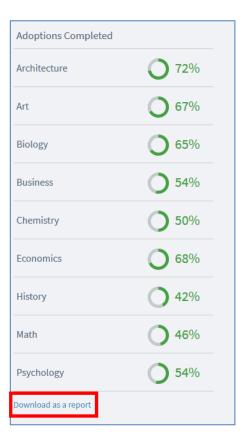


#### **Completed Adoptions:**

Below the materials box, there is a breakdown of adoptions by sub-department. If you are looking at the full term, you will see a breakdown by campus or department, depending on the set up of your school. You can click on any of the departments listed to review details.

This is a great way to compare the adoption rate of departments and decide which might need extra communication to stay on track for timely submission.

You can download this report as an excel file and share with Faculty and/or other Administrators at your school.

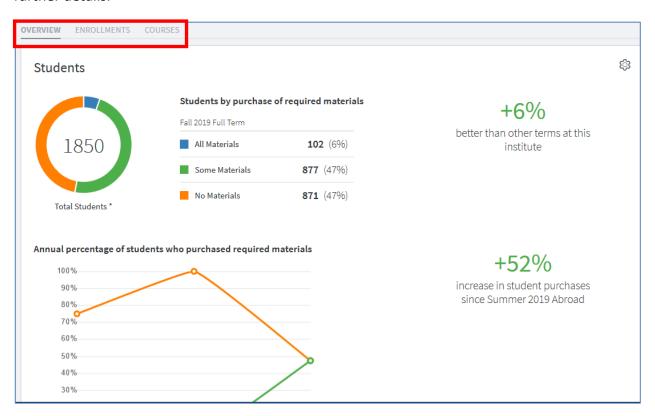


# **Analytics & Sales Reports**

The Analytics and Reports pages on the left-hand navigation provide Administrators will additional information about real-time sales, savings, orders, items, average items per order, average cost per item, and financial aid against the prior year.

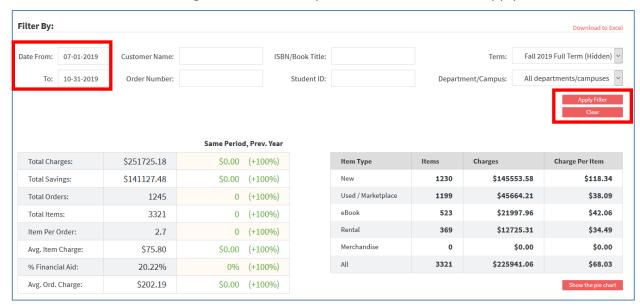
#### **Analytics:**

Click on Analytics to review an overview of student ordering behavior, types of materials purchased, and a review of sales by term. You can also click on the Enrollments or Courses tabs for further details.



#### **Reports:**

Select the dates and term to generate a sales report. Remember to click "Apply filter."



# Part 4: Help Page

#### Faculty Help:

Visit the Help page to view instructional videos and FAQs, or to contact your Client Success Manager with any additional questions.

Log in: Visit the website and log in with your school account username and password Click the "Help" button on the left-hand navigation and scroll down to send an email directly to your Client Success Manager.

#### **Student Help Page:**

Website: Students access their personalized page by logging in with their school account username and password and interact with the TextbookX platform/Customer Experience Team.

Email: Customerservice@textbookx.com

