VitalSource®

Customer Experience **Roadmap**

Adopt | Manage | Deliver | Learn | Analyze

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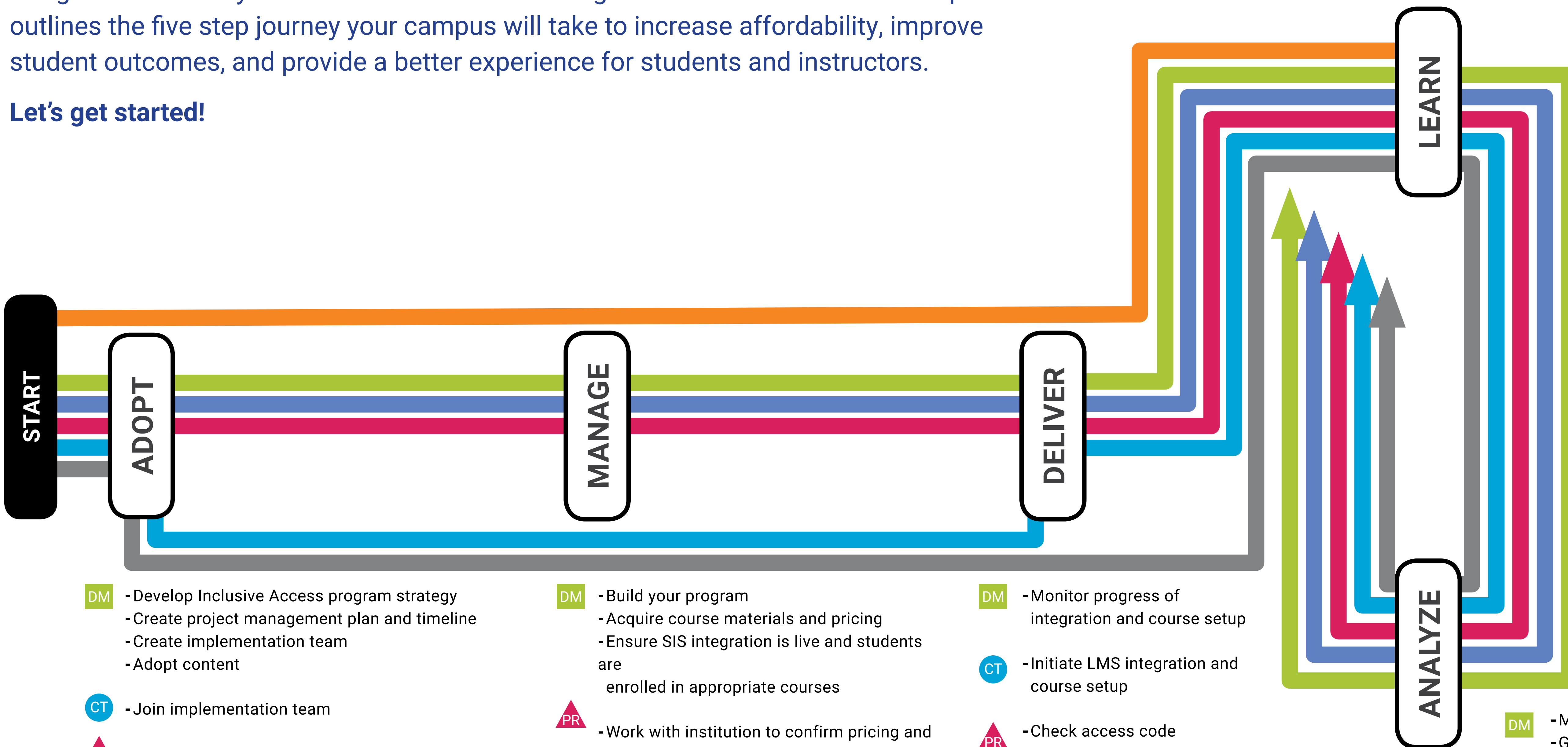
VitalSource | CUSTOMER EXPERIENCE MAP

Congratulations on your decision to transition to digital course materials! This map outlines the five step journey your campus will take to increase affordability, improve student outcomes, and provide a better experience for students and instructors.

Let's get started!



ADOPT

DM
- Develop Inclusive Access program strategy
- Create project management plan and timeline
- Create implementation team
- Adopt content

CT
- Join implementation team

PR
- Secure Inclusive Access adoptions

IS
- Select course materials for upcoming term and submit to campus store

CS
- Guide all stakeholders through program setup

MANAGE

DM
- Build your program
- Acquire course materials and pricing
- Ensure SIS integration is live and students are enrolled in appropriate courses

PR
- Work with institution to confirm pricing and deliver materials

CS
- Quarterback catalog creation

DELIVER

DM
- Monitor progress of integration and course setup

CT
- Initiate LMS integration and course setup

PR
- Check access code availability, if needed
- Conduct courseware training

CS
- Provide industry-leading technology expertise
- Ensure a seamless integration experience

LEARN

DM
- Complete go-live checklist
- Execute opt-out/in user communication

CT
- Ensure LMS integration is live and students are enrolled in appropriate courses

PR
- Conduct first day of class presentations

IS
- Begin teaching course

ST
- Access course materials on day one
- Understand opt-in/opt out process

CS
- Provide 24/7 student and instructor support
- Provide insights on how to get the most out of VitalSource tools

ANALYZE

DM
- Monitor impact and engagement
- Gather stakeholder feedback

DM CT PR IS
- Review lessons learned and outcomes
- Identify improvements for future terms

IS
- Use Instructor Dashboards to monitor student engagement and identify at-risk students

CS
- Conduct outcomes study in partnership with institution (optional)

KEY

- DM Digital Program Manager
- CT Campus Technology
- PR Publisher Representative
- IS Instructor
- ST Students
- CS Customer Success Manager

INFORMATION

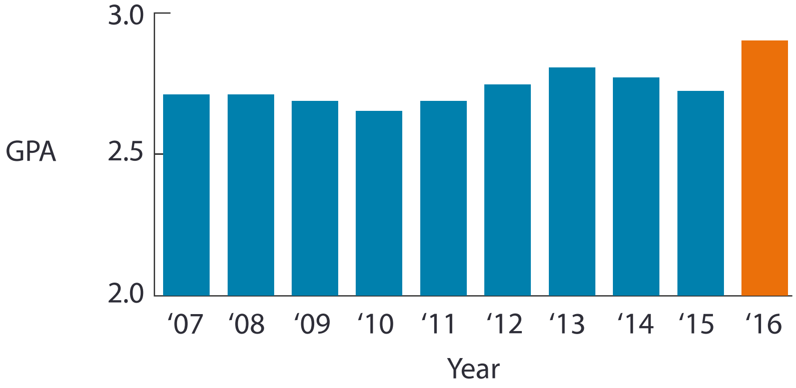
Your Customer Success Manager:

Email:

Introduction

VitalSource is excited to partner with you to launch and grow your digital course materials program. Your decision to transition to digital on campus will result in increased course materials affordability and a better student and faculty experience. Evidence also suggests that institutions that transition to digital course materials and Inclusive Access see improvements in student grades and outcomes.

IMPROVED STUDENT OUTCOMES



INCREASE COURSE MATERIALS AFFORDABILITY

In the 2017–2018 academic year, VitalSource saved students over $74 million off the cost of new print materials, and nearly $17 million off the cost of already low-cost digital materials. This translates to a savings of $109 per item off the cost of new print materials, and nearly $25 per item off the cost of digital materials purchased on the open market.

ARE YOU READY TO GET YOUR INSTITUTION ON THE PATH OF SAVINGS AND SUCCESS WITH DIGITAL MATERIALS?

This journey includes five stations:

- **Adopt:** At this station you'll set your program strategy and develop your program timeline.
- **Manage:** At this station, you'll build your program using our simple yet powerful tools.
- **Deliver:** When your program is built, you'll begin to deliver content to students and instructors.
- **Learn:** This station is where the real magic of going digital comes to life. Here, you'll see students go straight to learning on day one of courses. Instead of being lost in the confusing maze of course materials, students will be ready to learn with the correct content on day one.
- **Analyze:** At this station, you'll work with VitalSource and stakeholders on your campus to assess your program's effectiveness in terms of student savings and engagement.

Now that we know where we're going, let's introduce the team of people coming along for the ride:

ST **Students:** Students are the reason we do what we do, so they will be considered at each stop—even if they are not taking any action beyond learning and engaging with course materials.

IS **Instructors:** Instructors play a vital role in course material selection and adoption, and are ultimately the key group engaging students to learn and succeed.

IL **Institutional and academic leadership:** A campus is made up of many constituencies, and we've accounted for many of the steps and decisions that campus leaders need to make when moving to Inclusive Access.

DM **Digital program manager:** The role of the campus bookstore is always evolving. In order for an institution to successfully transition to Inclusive Access, the bookstore (likely the bookstore manager) will play the lead part in coordinating the implementation team.

CT **Campus technology:** From security and data considerations to LMS integrations, there is an array of technical considerations to think through. We'll partner with your IT team to set you up for success.

PR **Publisher representatives:** Publishers will be involved in the process from start to finish. Let VitalSource help you facilitate a comprehensive discussion with all of your publishing partners to make the process easy.

CS **VitalSource Customer Success Manager:** An expert in Inclusive Access, integration technologies, and your institution's primary interests, your Customer Success Manager (CSM) will ensure that all the moving pieces fall into place.

You'll see these icons throughout the map to let you know who is responsible for or interested in each action.

Let's get started!

ADOPT

In this section, we will help you create your implementation team, develop your program strategy, and build your project timeline. Once your team is assembled and strategy is determined, we'll take the first steps to begin setting up integrations with your campus systems and begin adopting course materials that will be used in your program.

AT THIS STATION, WE WILL COVER HOW TO:

- DM Create your implementation team
- DM Develop your Inclusive Access program strategy
- DM How to create your project management plan and timeline
- CT Uncover the benefits of LMS rostering
- DM Adopt content

AT THIS STATION, YOU MAY INTERACT WITH THESE PRODUCTS (BRIEF PRODUCT OVERVIEWS ARE PROVIDED FOR REFERENCE):

- Collect
- Manage
- Studio

ALSO OF INTEREST AT THIS STATION:

- Glossary of course material content types

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ADOPT

Create Your Implementation Team

The first step on your path to increased course materials affordability and a seamless student and instructor experience is to assemble a cross-functional implementation team to help get your program moving. Your VitalSource Customer Success Manager will work with your implementation team through every step of the journey to provide expertise and insights. Think of your Customer Success Manager as the train conductor responsible for delivering your program successfully and on time.

ALL INCLUSIVE ACCESS PROGRAMS HAVE THE FOLLOWING STAKEHOLDERS

- ST Students
- IS Instructors
- IL Institutional and academic leadership
- DM Digital program manager (usually an individual or team who works in the campus store)
- CT Campus technology (LMS administrator, course designer, and/or campus IT)
- PR Publisher representatives
- CS Technology vendor partners (for your institution, this is VitalSource)

WHO SHOULD JOIN YOUR IMPLEMENTATION TEAM?

While each Inclusive Access program is unique, we find that the most successful programs have representatives from the following areas:

DM **Campus store:** In our experience, the campus store is best positioned to manage the day-to-day aspects of Inclusive Access programs. Due to their existing expertise with the course materials ecosystem, integrations with critical campus systems like the SIS, ability to charge student accounts for course materials, relationships with faculty and students, and engagement with external partners like publishers and technology vendors, the campus store is an ideal champion for Inclusive Access programs and a critical member of your implementation team.

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CT **Campus technology:**

- LMS admin or course designer: Because of the need to integrate course materials with your campus learning management system, it is important that someone from the LMS admin or course design team joins your implementation team.
- IT support specialist: When students and faculty on your campus need technical support related to the LMS, they will reach out to your existing IT support team. It is important that a member of your IT support team joins the implementation team to allow them to receive tier one support training from VitalSource. This will also allow them to work with VitalSource to develop escalation paths from your campus to VitalSource.
- Student information system administrator: In order to place charges or refunds on student accounts, VitalSource will require limited student information system (SIS) data. Based on your Inclusive Access program strategy, which you will design in the next step of this guide, your SIS administrator will work with VitalSource to either complete an integration or set up a secure FTP site to share information to process charges and refunds based on student activity.

IL **Administration:** In our experience, the most successful programs have a champion in academic or institutional administration. This champion helps your implementation team navigate roadblocks, create program awareness, generate buy-in across campus departments and functional areas, and publicize program success. We recommend that you seek a program sponsor or champion to join your implementation team. This person could be a provost, dean, senior faculty member, director of e-learning, VP of academic affairs, chief technology officer, chief financial officer, etc.

CS **VitalSource Success Manager:** As noted above, your VitalSource Customer Success Manager will work with your implementation team through every step of the journey to provide expertise and insights. Your Customer Success Manager is the “train conductor” responsible for ensuring your program is delivered successfully and on time.

You may also find it useful to make the following departments on campus aware of the plan to transition to Inclusive Access:

Student government: We recommend inviting students from your campus student government association to have a seat at the table.

Accessibility office: Because students enrolled in Inclusive Access courses may have special needs, we recommend that you invite your campus team responsible for assisting students with special needs to learn more about VitalSource’s industry-leading commitment to accessibility. In the appendix to this guide, you will find a variety of resources to help explain our commitment to accessibility.

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ADOPT

Develop Your Inclusive Access Program Strategy

Before you begin building your program and adopting content, it's important to understand your institution's goals for the program, as well as your unique institutional needs. The questions below will help determine your program strategy and your institutional needs. We recommend that you answer these questions in collaboration with your implementation team and your VitalSource Customer Success Manager.

- What are your three primary goals for transitioning to Inclusive Access?
- How will you measure the success of your program?
- How many courses will participate in your Inclusive Access program at launch?
- What are the student enrollment projections for these courses?
- How many term starts are there per year?
- When is the census date, or the last date by which students may opt-out/opt-in to your program?
- When are students given access to courses in the LMS?
- Is your campus a BYOD environment, or do you supply students with laptops or other devices used to consume course materials?
- Which campus department is responsible for understanding student engagement data?
- Who on your campus requires access to operational reports?
- How do you plan to charge student accounts: via a one-time charge to the student account after the census date or via continuous charges?

Once your implementation team has answered the questions above, your VitalSource Customer Success Manager will help you adjust your project plan and timeline to account for any unique needs of your program.

ADOPT

How to Create Your Project Management Plan and Timeline

From start to launch, building your program will take eight to twelve weeks. While some programs may launch on a shorter timeline, we recommend allowing plenty of time for a smooth and stress-free experience for all stakeholders.

This worksheet will help you outline your program launch plan. Simply enter your desired launch date—ideally the first day of the term you plan to launch Inclusive Access—in the field labeled “Launch Date” (cell I5), and the spreadsheet will automatically calculate all the dates for the phases of your journey.

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Digital Implementation Project Timeline

Academic Term: [Implementation Term for Digital Adoptons]
DIGITAL PROGRAM MANAGER: [Project Manager's name]
CAMPUS NAME: [Institution Name]
LAUNCH DATE: Wednesday, August 1, 2018

PHASE		DETAILS			Date Range	
	Personas:		Number of days before launch		Date Range	
1	Digital Program Manager	Determine digital strategy	180	120	February 2, 2018	April 3, 2018
		Start collecting textbook adoptions	150	75	March 4, 2018	May 18, 2018
		Print Buyback Period - helps determine digital/IA adoptions	130	60	March 24, 2018	June 2, 2018
		Begin faculty recruitment process for upcoming IA Programs	120	90	April 3, 2018	May 3, 2018
		Build Program/Ensure items are loaded into Connect	90	60	May 3, 2018	June 2, 2018
		Adoptions for Summer/Fall are due	60	45	June 2, 2018	June 17, 2018
		Ensure SIS integration is live	60	30	June 2, 2018	July 2, 2018
		Finalize IA Adoptions	60	30	June 2, 2018	July 2, 2018
		Charge Student Accounts	-25	-15	August 26, 2018	August 16, 2018
2	Campus Technology (LMS Admin / Course Design / IT	LMS Upgrades/System Maintenance	90	60	May 3, 2018	June 2, 2018
		Ensure SIS integration is live	60	30	June 2, 2018	July 2, 2018
		Course Copy Process	50	20	June 12, 2018	July 12, 2018
		Course Link Creation	50	20	June 12, 2018	July 12, 2018
		Course Back Up Process	50	20	June 12, 2018	July 12, 2018
3	Publisher Representatives	Secure IA adoptions	200	100	January 13, 2018	April 23, 2018
		Work with institution to confirm pricing and deliver materials	190	75	January 23, 2018	May 18, 2018
		Create access code availability	100	75	April 23, 2018	May 18, 2018
		Conduct courseware trainings	60	15	June 2, 2018	July 17, 2018
		Conduct first day trainings	10	-10	July 22, 2018	August 11, 2018
4	Instructors	Select course materials	160	75	February 22, 2018	May 18, 2018
		Familiarize yourself with Bookshelf	160	5	February 22, 2018	July 27, 2018
		Teach your course using enhanced digital materials	0	-120	August 1, 2018	November 29, 2018
		Monitor engagement, reach out to at-risk students	0	-120	August 1, 2018	November 29, 2018
5	Students	Make decision to opt-in or opt-out of digital course materials	1	-14	July 31, 2018	August 15, 2018
		Learn using Bookshelf's enhanced study tools	1	-120	July 31, 2018	November 29, 2018
6	Customer Success Manager	Guide all stakeholders through program set up	180	ongoing	February 2, 2018	Ongoing
		Quarterback catalog development	120	30	April 3, 2018	July 2, 2018
		Use technical expertise to ensure seamless integration experience	120	-120	April 3, 2018	November 29, 2018
		Provide 24/7 support for instructors and students	60	-120	June 2, 2018	November 29, 2018
		Conduct outcomes study in partnership with institution	-10	-180	August 11, 2018	January 28, 2019

ADOPT

Uncover the Benefits of LMS Rostering

Transitioning to an Inclusive Access model, where all students get access to required learning materials on day one, is about more than reducing costs for students. Day-one digital access offers:

- A simpler and better course materials experience for students and instructors
- Access to powerful student engagement analytics for instructors and administrators
- A reduced workload for campus technology

Making the most of your investment is easy. Simply provide VitalSource with your LMS roster and we'll take care of the rest. By taking full advantage of your investment in day-one access, your institution will:

- Reduce the need to manually add links into individual courses, freeing up weeks of work for your campus LMS team
- Decrease support inquiries from students and instructors around course materials access via the LMS
- Ensure that 100% of students are licensed the correct learning materials before day one of courses
- Guarantee the best online and offline experience using VitalSource's industry-leading tools
- Provide day-one access to students via every delivery method, including online, offline, and native apps on the first day of class

VitalSource is committed to providing students and instructors with the best possible teaching and learning experience while maintaining the highest standards in user data privacy. Today, we integrate with your campus student information system (SIS) to facilitate charging student accounts for course content, and we have completed all security verifications required to access student information.

ADOPT

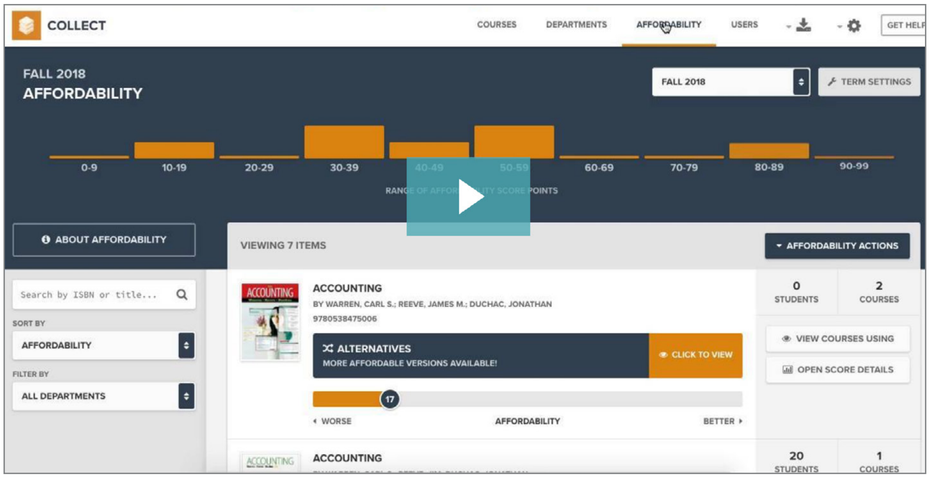
Adopt Content

Once your implementation team has determined your digital strategy, it's time to begin thinking about which courses to enroll in your Inclusive Access program. This step coincides with the work your campus store does each term to collect instructor course material adoptions.

Using Verba Collect, or your preferred adoptions tool, collect instructors' course material adoptions. Once adoptions are collected, you'll be able to target courses for inclusion in your Inclusive Access program based on:

- Course enrollment
- Potential student savings with Inclusive Access

This video provides a useful overview of how to use Verba Collect to target courses for inclusion in Inclusive Access.



You'll want to begin socializing your planned Inclusive Access program with instructors to generate interest in the program. Publisher sales reps are a great partner to help you spread the word on campus, and they are regularly discussing Inclusive Access with instructors.

Verba **Collect**

An online adoptions tool that integrates with bookstore back-office systems to increase the speed and efficiency by which adoptions are gathered from professors and department coordinators.

Users

Professors, department coordinators, and adoptions managers (typically bookstore staff or provost offices) use Verba Collect to submit and finalize adoptions for all courses at an institution.

Key Features

- Simplified instructor experience including pre-populated course assignments, easy-to-adopt past adoptions, and smart book search.
- Affordability scores and alternates badges help professors and department coordinators adopt the best version of a title for their students.
- Robust communication tools within Verba Collect help adoptions managers coordinate adoptions information in an organized way.
- Integration with almost all point of sale systems in the independent bookstore channel to easily send data back and forth.

ADOPTIONS FACT

Research shows that earlier adoptions from professors strongly correlate with bookstores offering lower cost textbooks for students.

How to Access

Verba Collect sends out customized emails to professors and department coordinators with a unique link that logs them into the professor walkthrough without any need for a username or password. Connect is accessed by adoptions managers via customized URLs that are specific to the institution.

Integration with VitalSource Product Suite

Verba Collect sends adoptions back to the bookstore back-office system, which then communicates to the Verba Compare, Compete, and Connect tools. It does not currently integrate with any of the VitalSource labeled products, but there are plans to roll the VitalSource digital catalog into Collect in the future.

Training and Support

Unlimited training and support for adoptions managers is available weekdays from the hours of 8:00am to 5:00pm PT. Department coordinators will be trained during the onboarding process, while professors will be trained by adoptions managers once they are trained themselves.

VitalSource **Manage**

Manage is VitalSource's robust content management system. Clients can search for content, assign distribution rights, manage custom pricing, and receive access to VitalSource platforms and solutions.

Users

Content owners (publishers) and distributors (institutions) use Manage. Publishers use Manage to control the distribution and pricing of their content. Institutions use Manage to request access to materials, keep record of the content they distribute, and maintain access to VitalSource solutions such as Bookshelf and Studio.

Key Features

- Searching for assets
- Book List Manager solution for content requests
- Managing distribution and pricing
- Creating codes for eBooks and courseware
- Help Desk portal for technical troubleshooting

PRO TIP

Communicate any changes in your publisher relationships to your Customer Success Manager as soon as possible. Those relationships must be accurately reflected in Manage in order to distribute content according to the right business rules.

How to Access

After receiving system credentials from your Customer Success Manager (CSM), clients can access Manage at https://manage.vitalsource.com. The Book List Manager solution is part of the Manage product suite and is available at https://booklist-manager.vitalsource.com.

Integration with VitalSource Product Suite

Manage interacts with Bookshelf to deliver authorized content to users at the appropriate license durations and price.

Training and Support

Work with your Customer Success Manager to coordinate Book List Manager training to help the content adoption process progress smoothly, as well as Help Desk training for your campus technology team to help in supporting faculty and students.

Studio

VitalSource Studio is an easy-to-use digital content authoring tool that helps users create digital-first, fully-responsive, and accessible content.

Users

Instructors, instructional designers, and content authors use Studio to create interactive learning materials such as open educational resources (OERs), orientation packets, and original content, or to remix and enhance existing content and OER.

Key Features

- No HTML or coding skills are required to build digital-first content
- Create responsive, interactive, and fully accessible content
- Customize OER material or original content
- Easily distribute content with Bookshelf
- Add in-text assessment, videos, slideshows, and audio

DO MORE WITH OER

Remix, reuse, or create OER using Studio and give your students accessible, high-quality digital materials while tracking engagement using our Instructor Dashboard.

How to Access

To access Studio, log in to https://studio.vitalsource.com/auth/. Studio requires a login and password. Your Customer Success Manager will set up access to Studio for the appropriate team at your institution.

Integration with VitalSource Product Suite

Studio allows you to easily publish content to Bookshelf and view student engagement through the VitalSource Instructor Dashboard.

Training and Support

Studio contains a walkthrough to train users on the application. Additionally, your Customer Success Manager will provide you with details on training and support materials.

Glossary of Course Material Content Types

There are three types of digital course materials that may be adopted as part of your program:

- Digital textbooks
- Courseware
- OER

DIGITAL TEXTBOOK FORMAT TYPES?

Fixed layout
Fixed-layout eTextbooks maintain the look and feel of a bound book—the text is fixed and the screen size determines the size of the text. These eTextbooks work best on large-screen devices and do not contain any embedded media or interactives.

Fixed-layout eTextbooks support a wide range of features, including (but not limited to): notes, highlights, text-to-speech, printing, syncing across devices, and more.

Fixed-layout eTextbooks are primarily PDF format.

Reflowable
Reflowable eTextbooks do not maintain the layout of a traditional bound book. Reflowable eTextbooks work well on any device, and respond to device screen size and shape much like a typical website. Reflowable eTextbooks may also contain embedded audio, video, or interactive components in addition to Bookshelf's standard study tools. These books conform to EPUB3 industry standards.

Reflowable eTextbooks support a wide range of features, including (but not limited to): notes, highlights, text-to-speech, printing, syncing across devices, and more.

Courseware
Non-eBook instructional content that is delivered as a standalone course or bundled with a corresponding eBook. Courseware varies by publisher and purpose, but is almost always walled off by a user-specific access code and can be delivered through an LMS integration or directly through Bookshelf.

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MANAGE

After determining your Inclusive Access strategy and making the upcoming term's adoption selections, you're ready to finalize your book list and pricing. VitalSource has several platforms and resources to make managing and scaling your Inclusive Access program easy and efficient.

AT THIS STATION, WE WILL COVER HOW TO:

DM Build your program

DM Acquire course materials and confirm pricing

DM Ensure SIS setup is live and students are enrolled in appropriate courses

AT THIS STATION, YOU MAY INTERACT WITH THESE PRODUCTS (BRIEF PRODUCT OVERVIEWS ARE PROVIDED FOR REFERENCE):

- **Manage** will be used to request content as well as confirm content availability and pricing when Collect and Connect are not in use
- **Collect** will be used to submit course material adoptions and finalize pricing
- **Connect** will be used to negotiate content pricing

MANAGE

Build Your Program

Creating a book list for the upcoming term will allow you to organize all of your content adoptions against their corresponding courses. Your Customer Success Manager, plus tools like Connect and Manage, can help you gather all of the materials you'll need.

Acquire Course Materials

You may have agreements directly with publishers for custom content or need to acquire custom ISBNs. Connect and Manage will allow you to keep track of the status of this content. As content becomes available, it will be distributed to you for item creation in Connect. From there, you can negotiate and finalize pricing to ensure you start the term with the most reliable and accurate data.

Ensure Student Information System (SIS) Setup Is Live

Your Customer Success Manager will work with you directly to set up an SFTP for enrollment file communication. You'll get instructions and a walkthrough, and we'll do some test file trial runs. Once confirmed, your student enrollment information will be pulled into Connect for tracking course content and student charges.

VitalSource **Manage**

Manage is VitalSource's robust content management system. Clients can search for content, assign distribution rights, manage custom pricing, and receive access to VitalSource platforms and solutions.

Users

Content owners (publishers) and distributors (institutions) use Manage. Publishers use Manage to control the distribution and pricing of their content. Institutions use Manage to request access to materials, keep record of the content they distribute, and maintain access to VitalSource solutions such as Bookshelf and Studio.

Key Features

- Searching for assets
- Book List Manager solution for content requests
- Managing distribution and pricing
- Creating codes for eBooks and courseware
- Help Desk portal for technical troubleshooting

PRO TIP

Communicate any changes in your publisher relationships to your Customer Success Manager as soon as possible. Those relationships must be accurately reflected in Manage in order to distribute content according to the right business rules.

How to Access

After receiving system credentials from your Customer Success Manager (CSM), clients can access Manage at https://manage.vitalsource.com. The Book List Manager solution is part of the Manage product suite and is available at https://booklist-manager.vitalsource.com.

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Training and Support

Work with your Customer Success Manager to coordinate Book List Manager training to help the content adoption process progress smoothly, as well as Help Desk training for your campus technology team to help in supporting faculty and students.

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Integration with VitalSource Product Suite

Verba Collect sends adoptions back to the bookstore back-office system, which then communicates to the Verba Compare, Compete, and Connect tools. It does not currently integrate with any of the VitalSource labeled products, but there are plans to roll the VitalSource digital catalog into Collect in the future.

Training and Support

Unlimited training and support for adoptions managers is available weekdays from the hours of 8:00am to 5:00pm PT. Department coordinators will be trained during the onboarding process, while professors will be trained by adoptions managers once they are trained themselves.

Verba **Connect**

A digital discovery and management tool for Inclusive Access programs.

Users

Digital program managers (also known as textbook managers) use Connect to explore viable candidates for Inclusive Access and manage their programs, while students use the Verba Connect Portal to manage participation status.

Key Features

- Automatic matching of adoptions lists to the VitalSource catalog to provide workflows for digital program managers to easily negotiate market competitive pricing directly with publishers and activate items for Inclusive Access (IA) courses.
- Email communication tools to keep students in the loop about their participation in the program across a number of filters and timelines.
- Dedicated student "customer service" page for bookstores to help better serve students.
- Consolidated, flexible billing and invoicing—stores pay one invoice for all IA content.
- Tracking all necessary student census, opt out, and item and section information for easy student charging and reporting to publishers.
- Dashboard highlighting KPIs about the overall health of the program.

How to Access

Verba Connect is accessible to digital program managers at www.verbaconnect.com. Access requires a username and password. Your Customer Success Manager will set this up for the relevant members of your campus implementation team.

Integration with VitalSource Product Suite

Verba Connect pulls in the VitalSource catalog so administrators can easily locate and activate digital materials at the right price. Once items are activated for their given courses, Customer Success Managers will help campus IT link up digital resources within their learning management system using our LTI integrations for day-one access.

Training and Support

Unlimited training and support for Connect administrators is available weekdays from the hours of 8:00am to 5:00pm PT. Emergency and after hours support is also available.

DELIVER

Delivering your eBook and courseware content on the first day of class is easy with an LMS integration powered by VitalSource. Once your adoptions are in and you've finalized your content, you're ready to integrate.

AT THIS STATION, WE WILL COVER HOW TO:

- CT Initiate learning management system (LMS) integration and course setup
- CT Seek industry-leading technology expertise from your VitalSource team
- CT Achieve a seamless integration experience
- DM Monitor progress of integration and course setup
- DM Train and communicate across campus

AT THIS STATION, YOU MAY INTERACT WITH THESE PRODUCTS OR HANDBOOKS (BRIEF PRODUCT OVERVIEWS ARE PROVIDED FOR REFERENCE):

- LMS guides
- Course Dashboard
  - Student
  - Instructor
- Portal
- Rosters

VitalSource

DELIVER

Initiate LMS Integration and Course Setup

VitalSource has many integration capabilities, and one of the most widely used is the Learning Tools Interoperability (LTI) standard. For any LTI-compliant LMS or platform, VitalSource can act as a tool provider. Installation is as simple as a one-time LTI tool configuration and link setup in the location of your choosing.

1. **CONFIGURE THE LTI TOOL**
   Your VitalSource Customer Success Manager will provide you with the credentials you need to access our LTI provider. You'll need to enter a consumer key and shared secret to access your content, as well as a launch (or base) URL. The LTI tool configuration step is also where you'll select security preferences for regulating which data is passed to VitalSource. As a best practice, we recommend allowing the following data points to be sent on all launches from your LMS: tool consumer information, context, course, LTI user ID, and LTI role. To provide your campus with the most robust user experience and analytics, it's preferred to make as much data as possible public to the VitalSource tool provider. As a best practice, we suggest configuring the LTI tool at the Global, System, or Account level in your LMS so that it can be accessed from all courses to which the tool is made available.

2. **PAIR COURSES TO CONTENT**
   To avoid having to place a content-specific link in each course, you can provide VitalSource with your roster or your course/book pairing. Your Customer Success Manager can ensure that our system recognizes the context passed in the LTI launch to present the user with the corresponding course content. Details about VitalSource's rostering capabilities can be found in the rostering guide that follows; we can also accept a .csv of your course IDs and their paired ISBNs.

3. **CREATE CONTENT LINKS**
   Link creation and placement can be done in a variety of ways. However, we recommend adding links to modules or courses to enable faculty to have the most options for organizing their courses as they see fit.

DELIVER

Seek Industry-Leading Technology Expertise From Your VitalSource Team

Because every LMS can have its own vocabulary and implementation, there can be times that you need an expert to consult with you about your unique configuration. Your Customer Success Manager may bring in an Integration Manager to review your setup and create a tailored solution that works for your campus.

Achieve a Seamless Integration Experience

After your integration is configured, we recommend executing several test launches from your courses while your Customer Success Manager monitors our logs. This will ensure that we are receiving all data points that we need for analytics and a smooth go-live. Additionally, this test will highlight any areas of the user experience that you'd like to change or tweak prior to launch.

Monitor Progress of Integration and Course Setup

While the LMS admin is likely going to be doing the majority of the steps at the Deliver stop, the digital program manager should stay involved in the process to stay up to date on progress and have an understanding of the overall technical solution.

Train and Communicate Across Campus

With the integration in place and testing completed, it's time to start bringing all of your key stakeholders into the fold. Outside of the core implementation team, it's a good idea to socialize the new program and digital content with the broader campus audience.

VitalSource has a suite of resources for getting the most out of training on our tools and solutions. If you have the resources to conduct continued education for your faculty and staff, we will provide you with training materials to facilitate those sessions. The tools provided in our Train the Trainer program include training scripts, presentations, and learning activities with defined objectives and outcomes. If you are interested in learning more about Train the Trainer, your Customer Success Manager will be happy to get you started.

VitalSource **LTI Tool for Canvas**

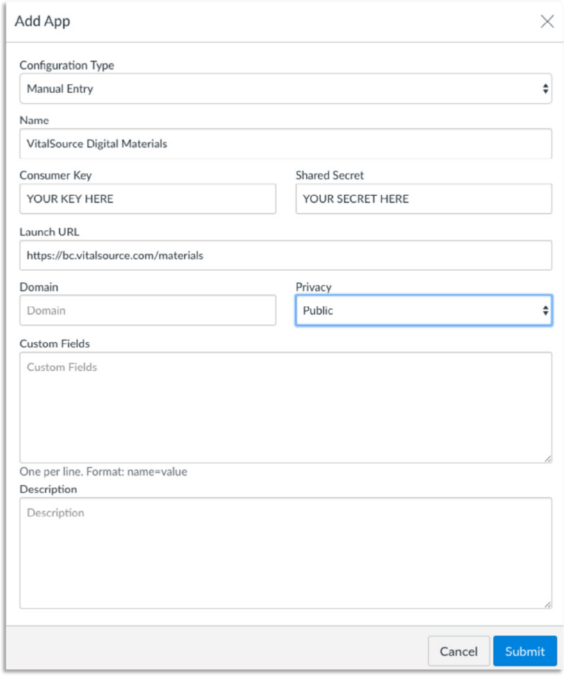
The VitalSource LTI tool provides an easy integration with Canvas, allowing seamless access to VitalSource Bookshelf and Analytics tools.

Users

Campus Canvas administrators can quickly and easily install the VitalSource LTI tool in order to provide students and faculty seamless access to VitalSource Bookshelf and Analytics tools.

How to Install

ACCOUNT LEVEL CONFIGURATION OF LTI EXTERNAL TOOL*



1. Log in to Canvas, navigate to the **Admin** tab, and select the account under which the VitalSource-enabled courses are set up.
2. Select **Settings** from the left navigation menu.
3. Select the **Apps** tab.
4. Select the **View App Configurations** button.
5. Click on **+App**.
6. Enter the following configurations:
   - **A. Name:** Enter a name that will make sense for your campus (Recommended: VitalSource Digital Materials).
   - **B. Consumer Key & Shared Secret:** As provided by VitalSource Customer Success team.
   - **C. Launch URL****
     - I. Multi-Course dashboard: https://bc.vitalsource.com/materials
     - II. Single-course dashboard: https://bc.vitalsource.com/books
     - III. Direct to a specific book: https://bc.vitalsource.com/books/[VitalSourceBookIdentifier]
   - **D. Privacy:** Select the privacy option that makes the most sense for your campus. We recommend selecting Public. If you have questions about how this will affect the faculty and student experience, let your VitalSource Customer Success Manager know.
7. Select **Submit.**

**The LTI External Tool can also be configured at the course level if that is the preferred method for your campus*
***For multi- and single-course dashboard, the VitalSource Customer Success team will work with your bookstore to gather your school's book adoptions and pair them to your LMS courses. For a direct launch to a specific book, you will need to enter the VitalSource Book Identifier in your URL.*

VitalSource **LTI Tool for Canvas**

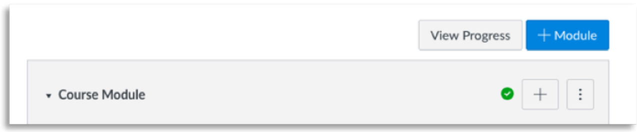
MANAGING LINK PLACEMENT

Once the LTI External Tool is installed, we recommend adding links to a Module within the relevant Canvas courses. Modules allow instructors to organize the link within their course as they wish.

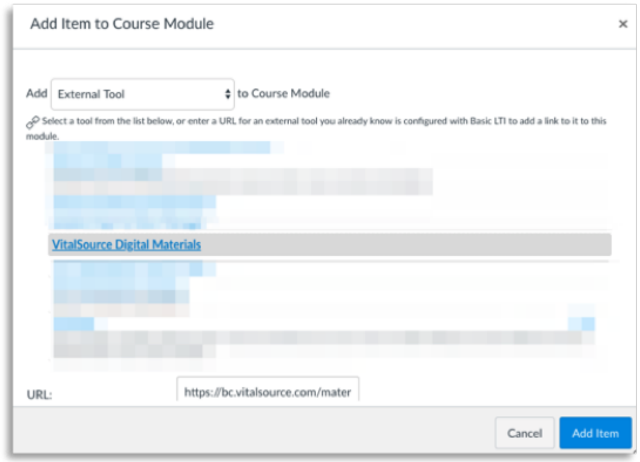
STEPS FOR ADDING A LINK TO A MODULE

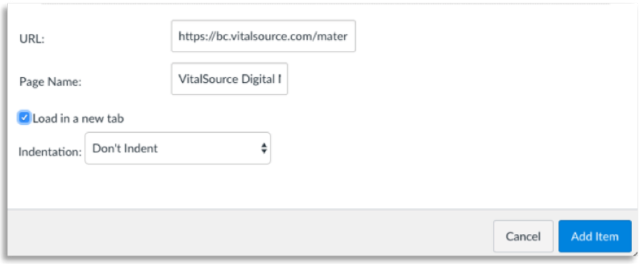
1. Within a course in Canvas, navigate to the **Modules** tab.
2. If no Modules exist, create one by clicking **+Module** and providing a name for your module.
3. Once in the Module where you will add the LTI Link, click the **+** button to add an item. Choose the following to add your LTI Link:
   a. Choose External Tool from the drop-down menu and select the VitalSource External Tool. The tool will be listed under the name used in Step 6a of the LTI App Configuration.
   b. The **URL** will be auto-populated and should not be edited.
   c. **Page Name** will auto-populate and can be edited if desired.
   d. Check the box for **Load in new tab.**
   e. Click **Add Item.**
4. Don't forget to publish your Module and the LTI Link to make them visible to students!

STEP 1-2

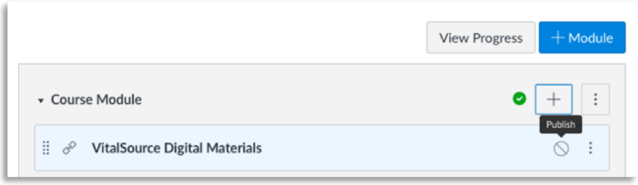


STEP 3





STEP 4



Training and Support

Your Customer Success Manager will provide you with details on Bookshelf training and support materials for the VitalSource LTI tool and VitalSource Bookshelf.

VitalSource **LTI Tool for Brightspace/D2L**

The VitalSource LTI tool provides an easy integration with Brightspace, allowing seamless access to VitalSource Bookshelf and Analytics tools.

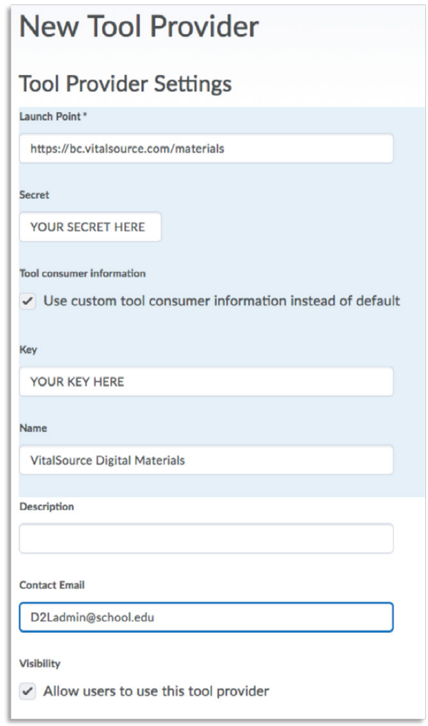
Users

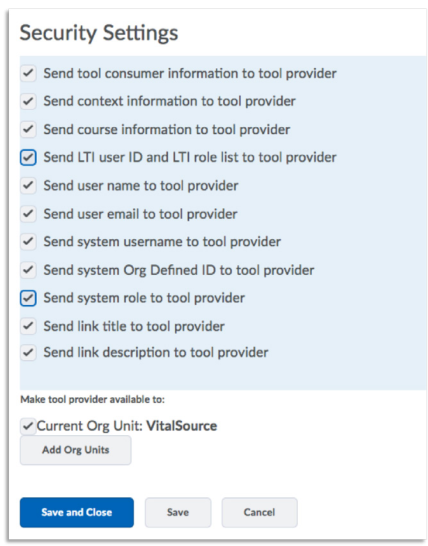
Campus Brightspace administrators can quickly and easily install the VitalSource LTI tool in order to provide students and faculty seamless access to VitalSource Bookshelf and Analytics tools.

How to Install

SETUP STEPS FOR D2L/BRIGHTSPACE

1. Log in to Brightspace and navigate to **Admin Tools > External Learning Tools.**
2. Click on **Manage Tool Providers.**
3. Click on **New Tool Provider.**
4. Populate the tool provider form with the following information:
   - **A. Launch Point****
     - **I. Multi-course dashboard https://bc.vitalsource.com/materials**
     - **I. Single-course dashboard https://bc.vitalsource.com/books**
     - **I. Direct link to a specific book https://bc.vitalsource.com/books/[VitalSourceBookIdentifier]**
   - **B. Secret:** As provided by VitalSource Customer Success team.
   - C. Check the box to use custom tool consumer information instead of default.
   - **D. Key:** As provided by VitalSource Customer Success team.
   - **E. Visibility:** Check the box to allow users to use this tool provider.
5. Security Settings: Our recommendation is to check all boxes. At minimum, the following are required:
   - a. Send tool consumer information to tool provider.
   - b. Send context information to tool provider.
   - c. Send course information to tool provider.
   - d. Send LTI user ID and LTI role list to tool provider.
   - e. Send link title to tool provider.
6. Select Save and Close.





**The LTI Tool Provider can also be configured at the course level if that is the preferred method for your campus*

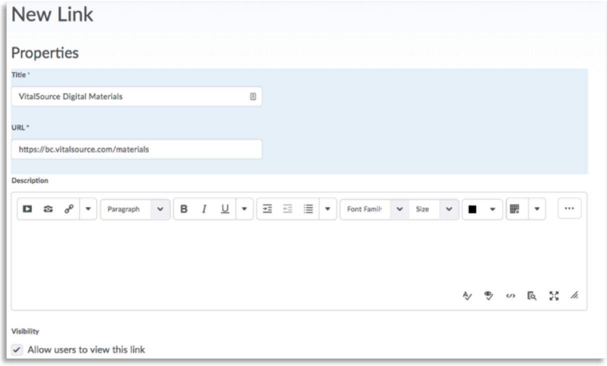
VitalSource **LTI Tool for Brightspace/D2L**

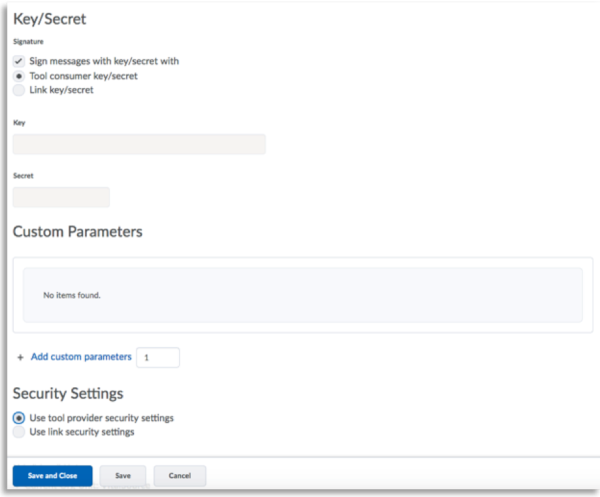
***For multi- and single-course dashboard, the VitalSource Customer Success team will work with your bookstore to gather your school's book adoptions and pair them to your LMS courses. For a direct launch to a specific book, you will need to enter the VitalSource Book Identifier in your URL.*

SETUP STEPS FOR D2L/BRIGHTSPACE

System Level Configuration of LTI External Learning Tool Links

1. Once you've added the Tool Provider, click the **Manage External Learning Tool Links** tab.
2. Click **New Link.**
3. Enter the following properties:
   - **a. Title:** Enter the name for the link you'd like to display in your courses (Recommended: VitalSource Digital Materials).
   - **b. URL:**
     - **I. Multi-course dashboard: https://bc.vitalsource.com/materials**
     - **II. Single-course dashboard: https://bc.vitalsource.com/books**
     - **III. Direct link to a specific book: https://bc.vitalsource.com/books/[VitalSourceBookIdentifier]**
   - c. Visibility: Check the "Allow users to view this link" box.
   - d. ey/Secret: Tool consumer key/secret.
   - e. Security Settings: Use tool provider security settings.
4. Click **Save and Close.**





VitalSource **LTI Tool for Brightspace/D2L**

MANAGING LINK PLACEMENT

Once the LTI External Tool is installed, we recommend adding links to a Module within the relevant Brightspace courses. Modules allow instructors to organize the link within their course as they wish.

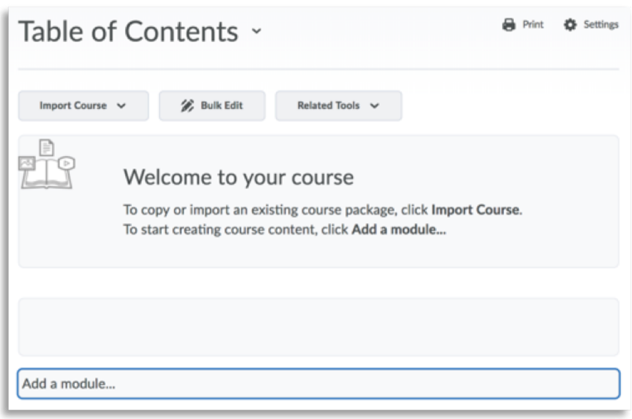
STEPS FOR ADDING A LINK TO A MODULE

1. Within a course in Brightspace, navigate to the Table of Contents.
2. If no Modules exist, create one by providing a name for your module.
3. Once in the Module where you will add the LTI Link, click Existing Activities > External Learning Tools.
4. Click Create New LTI Link and select the VitalSource link.

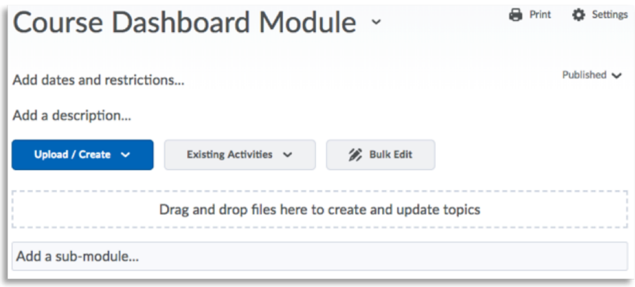
Training and Support

Your Customer Success Manager will provide you with details on Bookshelf training and support materials for the VitalSource LTI tool and VitalSource Bookshelf.

STEP 1



STEP 2



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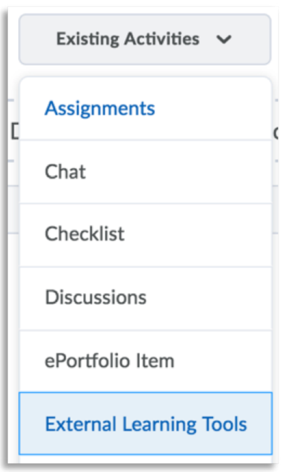
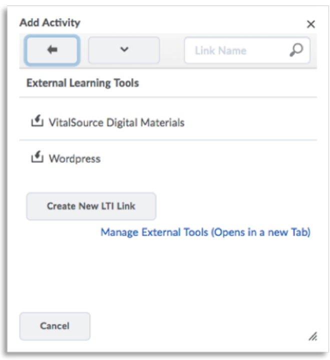


STEP 4



VitalSource **LTI Tool for Moodle**

The VitalSource LTI tool provides an easy integration with Moodle, allowing seamless access to VitalSource Bookshelf and Analytics tools.

Users

Campus Moodle administrators can quickly and easily install the VitalSource LTI tool in order to provide students and faculty seamless access to VitalSource Bookshelf and Analytics tools.

How to Install

SETUP STEPS FOR MOODLE

System Level Configuration of LTI Tool Provider*

1. Log in to Moodle and navigate to **Site Administration > Plugins > Activity Modules > LTI > Manage External Tool Types.**
2. Click Add **External Tool Configuration.**
3. Enter the following Tool Settings:

    a. Tool Name: Enter the name for the tool that makes sense to your campus program (Recommended: VitalSource Digital Materials).

    b. Tool Base URL**

    - **I. Multi-course dashboard: https://bc.vitalsource.com/materials**
    - **II. Single-course dashboard: https://bc.vitalsource.com/books**
    - **III. Direct link to a specific book: https://bc.vitalsource.com/books/[VitalSourceBookIdentifier]**

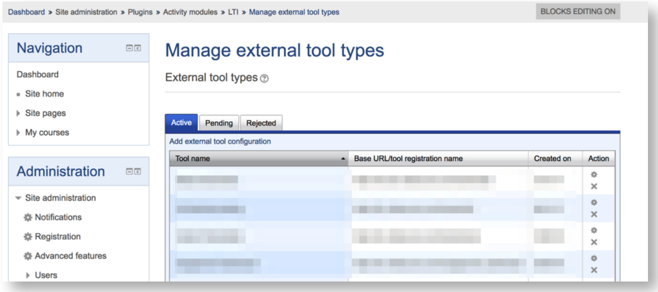
    d. Consumer Key: As provided by the VitalSource Customer Success team

    e. Shared Secret: As provided by the VitalSource Customer Success team

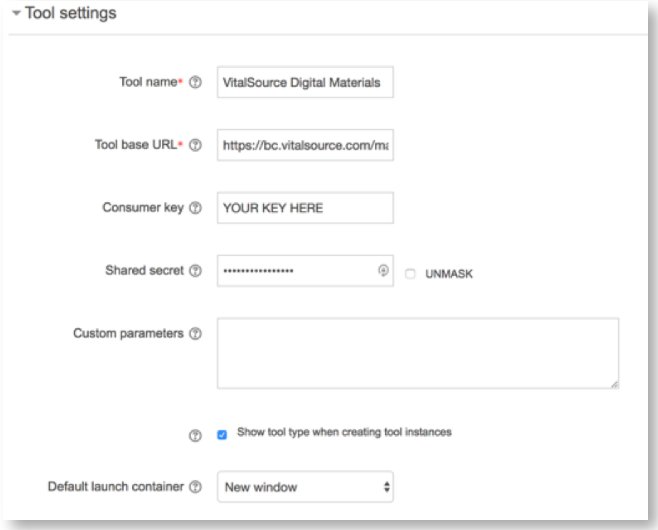
    f. Show tool type when creating tool instances: Check the box

    g. Default Launch Container: New Window

STEP 1-2



STEP 3



VitalSource **LTI Tool for Moodle**

4. Privacy Settings: Our recommendation for the following is to select **Always.** If you have questions about how we use this data, let your Customer Success Manager know.
    a. Share launcher's name with tool
    b. Share launcher's email with tool
    c. Accept grades from the tool
5. Click **Save Changes.**

***The LTI Tool Provider can also be configured at the course level if that is the preferred method for your campus*

***For multi- and single-course dashboard, the VitalSource Customer Success team will work with your bookstore to gather your school's book adoptions and pair them to your LMS courses. For a direct launch to a specific book, you will need to enter the VitalSource Book Identifier in your URL.*

MANAGING LINK PLACEMENT

Once the LTI External Tool is installed, links should be added in the relevant courses.

Steps for Adding a Link to a Course

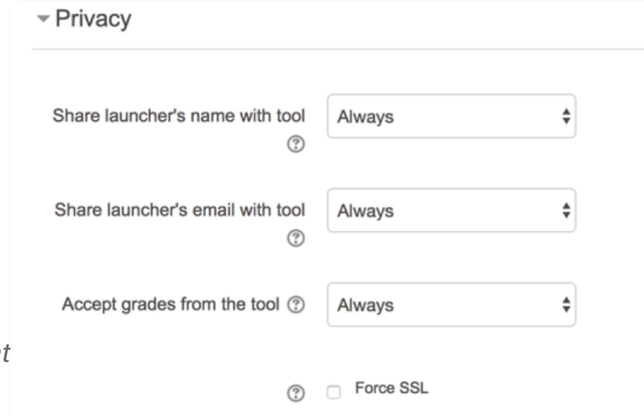
1. Within a course in Moodle, turn editing on.
2. In the relevant section of your course, select **Add an Activity or Resource.**
3. Select **External Tool** and click **Add.**
4. Name the activity and choose the previously created External Tool Type from the drop-down menu.
5. All other settings will be taken from the External Tool Type defaults that were selected during tool installation. Click either **Save and Return to Course** or **Save and Display.**

Training and Support

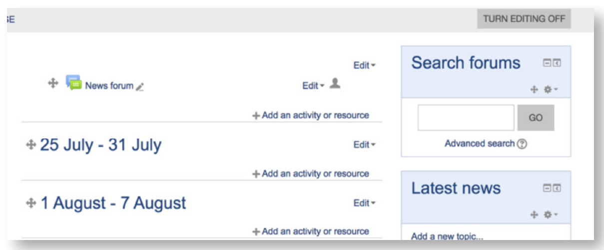
Your Customer Success Manager will provide you with details on Bookshelf training and support materials for the VitalSource LTI tool and VitalSource Bookshelf.

VitalSource®

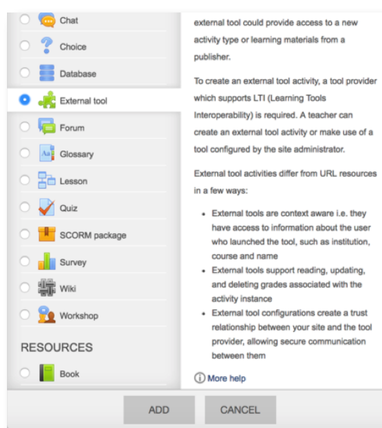
STEP 4



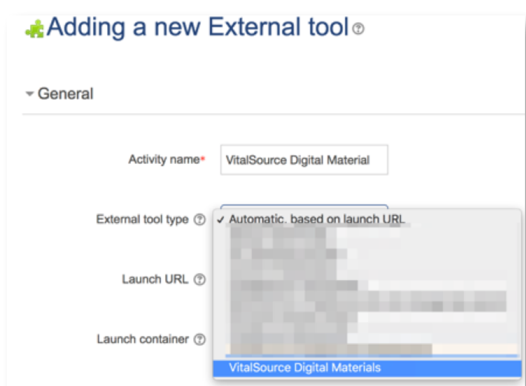
STEP 1-2



STEP 3



STEP 4



VitalSource **Course Dashboard**

The Course Dashboard provides a central resource for students and instructors to access all of the VitalSource resources adopted for their school's Inclusive Access program.

Users

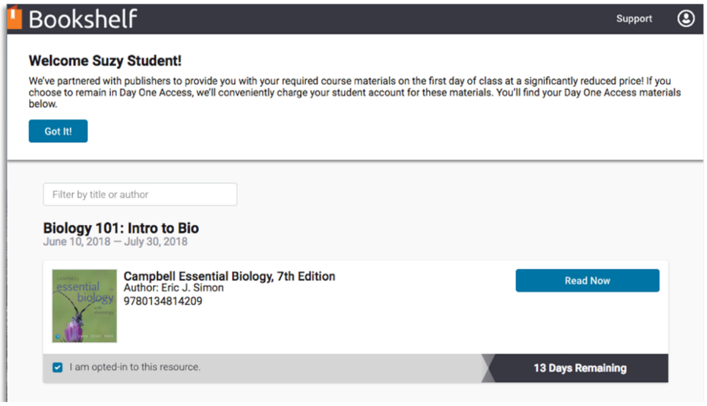
Students can update their opt-out decisions and launch to their digital content from Course Dashboard . Instructors can view their digital content and launch to additional resources of interest, like the VitalSource Instructor Dashboard.

Key Features

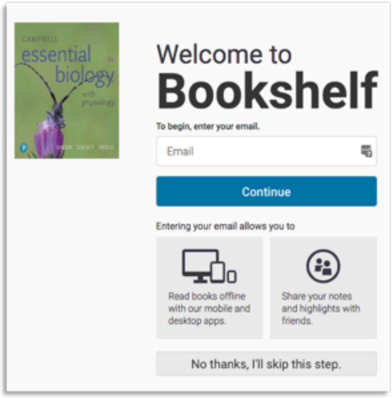
- Users accessing the VitalSource Course Dashboard from their LMS will benefit from:
  - » A seamless login experience.
  - » A centralized location for students to manage their opt-out decisions and for instructors to access additional VitalSource resources, like our Instructor Dashboards for viewing student engagement.
  - » Easy access to course materials.
  - » Once in Bookshelf, users can enjoy features like notes, highlights, text-to-speech, flashcards, and search.

Student Experience
The first time a student launches one of their digital materials, they will see an interstitial sign-on page. They can choose to create or log in to a VitalSource Bookshelf account, or continue to their digital material without registering for an account.

Students will only see this screen the very first time they launch. After that, we'll remember their decision and take them straight to Bookshelf.



FIRST TIME VISITOR

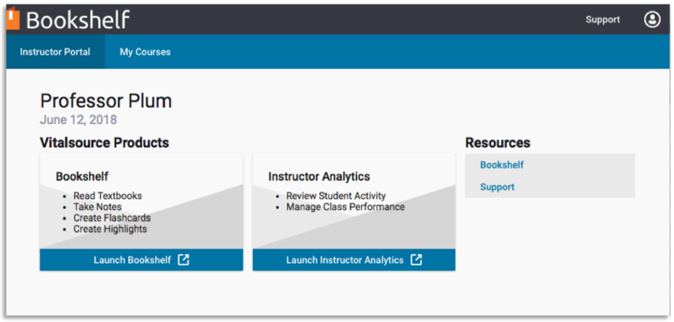


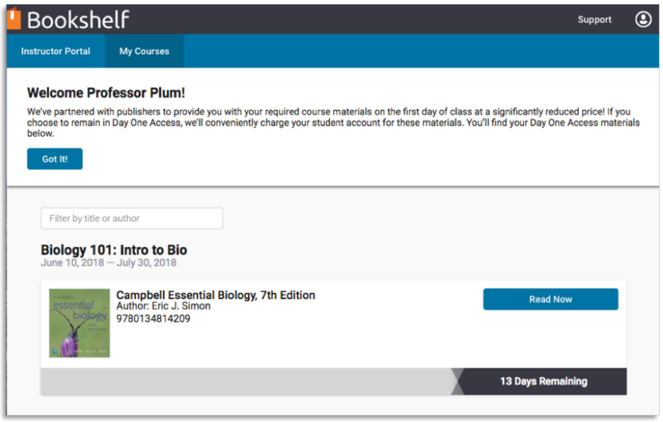
RETURNING VISITOR

VitalSource®

VitalSource **Course Dashboard**

Instructor Experience





How to Access

Course Dashboard is accessible from your LMS. The configuration for the VitalSource LTI External Tool is quick and easy. You will need to work with the VitalSource Customer Success team to obtain your consumer key and secret. The team will also work with your bookstore to collect your digital adoptions and associate them with your courses. This allows you to use a generic link for all classes without adding a step for instructors to adopt the digital materials they have already chosen for their classes.

Integration with VitalSource Product Suite

Course Dashboard integrates with your LMS via our standard LTI integration capability. From Course Dashboard , VitalSource will SSO users directly into their Bookshelf accounts.

Training and Support

Your Customer Success Manager will help you determine the best user experience for your institution. The CSM will provide demos and training to make sure you feel comfortable with the integration and steps for both instructors and students.

Verba **Connect Portal**

A personalized student hub for Inclusive Access materials

Users

Any student assigned to courses with Inclusive Access materials at institutions that utilize the Verba Connect platform.

Key Features

- Accessible from multiple touch points including one-click email links, Verba Compare, and LMS single sign-on.
- Students can easily manage their participation in Inclusive Access programs through dedicated opt-in/opt-out buttons on the item level.
- When a student decides to opt out, they are prompted to provide their reason for doing so, allowing the bookstore to synthesize and act on responses.
- All Inclusive Access information (title, status, pricing data, item-specific notes, access code details, etc.) exists in one consolidated interface.

ADOPTION FACT

Most students report opting out of Inclusive Access items because they believe the book is either A. Too expensive, or B. They prefer the print version of the resource.

How to Access

Verba Connect sends out customized emails to students enrolled in Inclusive Access courses with a unique link that logs them into the portal without any need for a username or password. They can also access the portal through LMS single sign-on links and Verba Compare.

Integration with VitalSource Product Suite

The Verba Connect Portal is integrated with VitalSource's product suite through Verba Connect. It also integrates via single sign-on with the LMS via existing VST integrations.

Training and Support

Verba Connect administrators will be trained on Verba Connect and the Connect Portal during onboarding, and have unlimited support throughout the length of their contract. Administrators will also receive a "train the trainer" demonstration from their Customer Success Manager, which will enable them to support individual students.

VitalSource **Rostering**

Make the Most of Your Investment in Day-One Access

Transitioning to an Inclusive Access model, where all students get access to required learning materials on day one, is about more than reducing costs for students. Day-one digital access offers:

- A simpler and better course materials experience for students and instructors
- Access to powerful student engagement analytics for instructors and administrators
- A reduced workload for campus technology

Making the most of your investment is easy. Simply provide VitalSource with your LMS roster and we'll take care of the rest. By taking full advantage of your investment in day-one access, your institution will:

- Reduce the need to manually add links into individual courses, freeing up weeks of work for your campus LMS team
- Decrease support inquiries from students and instructors around course materials access via the LMS
- Ensure that 100% of students are licensed the correct learning materials before day one of courses
- Guarantee the best online and offline experience using VitalSource's industry-leading tools
- Provide day-one access to students via every delivery method, including online, offline, and native apps on the first day of class

VitalSource is committed to providing students and instructors with the best possible teaching and learning experience while maintaining the highest standards in user data privacy. Today, we integrate with your campus student information system (SIS) to facilitate charging student accounts for course content, and we have completed all security verifications required to access student information.

Frequently Asked Questions

Why do you need my LMS roster data?

At VitalSource, we are committed to helping your institution improve student outcomes while also reducing the cost of course materials. We do this by making it easier for students to learn on day one, and by offering instructors and administrators valuable insights into student engagement. To achieve these goals, we rely on LMS data to match students and instructors to their assigned course content. Providing your LMS data to VitalSource automates manual setup processes and offers valuable insights and functionality for your campus.

VitalSource **Rostering**

Make the Most of Your Investment in Day-One Access

What do you do with LMS data?

We use LMS data to grant students access to their required learning materials. We also use LMS data to power VitalSource Analytics, which gives instructors and administrators on your campus access to valuable student engagement data to identify and support at-risk students. We do not share student or instructor information with any third party, unless specifically requested by your institution.

How does my institution provide the roster to VitalSource?

It's easy! All you need to do is securely provide VitalSource a key/secret, to your campus LMS to access your course section and roster data. Once you've provided us the authorization via that key/secret we do the rest. Contact your customer success manager to get started.

When will VitalSource pull LMS roster data?

We use only the LMS data that is required to grant students and instructors access to their required learning materials. Once we know a course is using VitalSource technology, we will refresh the data at least daily during the term to ensure data is up to date across the breadth of VitalSource-powered products used at your institution.

What about data for students not enrolled in courses using VitalSource-powered technology?

Any course not using a VitalSource-powered product or service will be ignored and purged after roster ingestion. Learn more about our commitment to privacy at get.vitalsource.com/privacy-overview.

LEARN

Welcome to the Learn stop. You have arrived At this station because your digital implementation strategy is complete, content has been adopted, and you completed the SIS and LMS integration setup. Now your digital content implementation is ready for launch.

AT THIS STATION, WE WILL COVER HOW TO:

- DM Complete your go-live checklist
- DM Execute opt-out/in user communication
- CT Ensure LMS integration is live and students are enrolled in appropriate courses
- IL IS DM Encourage students to access course materials on day one
- IS DM Help students understand the opt-in/opt-out process
- ALL Take advantage of 24/7 student and instructor support (all)
- ALL Benefit from VitalSource insights to get the most out of your tools (all)

AT THIS STATION, YOU MAY INTERACT WITH THESE PRODUCTS (BRIEF PRODUCT OVERVIEWS ARE PROVIDED FOR REFERENCE):

- Bookshelf
- Course Dashboard
  - Student
  - Instructor

LEARN

Complete Your Go-Live Checklist

The Go-Live Checklist will help to manage all of the required tasks across departments and ensure they are completed by the assigned stakeholder(s) prior to launch. Use this tool to keep members of the implementation team on track toward project completion.

Execute Opt-Out/In User Communication

It is imperative that students have a clear understanding of the opt-out/opt-in process and the actions they need to take. We recommend that you establish a communication plan at least 90 days prior to launch and send student communication as close to the term start as is feasible so that students are aware of their role in the process. This will help to ensure that student decisions are captured and access to content is adjusted appropriately.

Encourage Students to Access Course Materials on Day One

One of the primary benefits of enabling a VitalSource integration is that students will have the ability to access content on the very first day of class. It's important to remind students to click on the links in their LMS as soon as possible so that they can start taking advantage of learning materials early and often.

Help Students Understand the Opt-in/Opt-out Process

If a student wishes to purchase course materials elsewhere or perhaps already has a particular course's content from an earlier semester, she can select out of acquiring the content within the add/drop window.

Ensure LMS Integration Is Live and Students Are Enrolled

Work with the VitalSource Success Manager to test the LMS integration in the days leading up to the digital implementation launch. The testing should be completed before students receive access to courses and content in case adjustments need to be made. Some questions to answer during the testing process include:

- Do the digital content files open from the links created?
- Is the content displaying appropriately in Bookshelf or the courseware platform used?
- Is the assignment of content to courses still accurate, or have changes been requested?

Be sure to transition courses from a testing environment to a live environment once testing is complete so that students can enroll. On the day of launch, we suggest that you monitor activity on your campus and schedule periodic check-ins with faculty to help gauge whether there are any outlier integration or content issues that need to be resolved.

Take Advantage of VitalSource's 24/7 Student and Instructor Support

Although you will have ongoing support from a Customer Success Manager, communicate with your faculty and students about the 24/7 availability of VitalSource's Customer Support team. This team of technical specialists will be able to help with integration and product-related questions and can be a point of escalation for your own technical support team. Submit requests and receive help via phone or message chat at https://support.vitalsource.com.

Benefit From VitalSource Insights

The training your team receives during the onboarding process and the conversations you have with the Customer Success Manager will arm you with tools and use cases in order to take full advantage of what the products and solutions have to offer. Use resources such as Best Practices for Teaching With Digital to guide your instructors through the initial use of Bookshelf and prepare them to answer some fundamental student questions. Also, encourage instructors to use the Course Dashboard to keep track of how students are engaging with the digital content. It could prepare them to have performance-related conversations with students sooner rather than later, potentially increasing overall performance throughout the course.

LEARN

Inclusive Access “Go-Live” Checklist

DM DIGITAL PROGRAM MANAGER

STATION 1: ADOPT

- Determine digital strategy
  - How many courses will be offered?
  - Align the program with an academic start (fall, spring, summer)
  - Identify stakeholders (campus learning and development/accessibility officers, learning management system (LMS) administrators, bursars officers)
  - Determine reporting needs
  - Determine campus stakeholder training and communication needs
  - Identify support personnel (for eTextbook adoptions)
- Complete Digital Implementation Project Timeline
- Begin faculty recruitment
- Collect adoptions
  - eTextbook adoptions
    - Will content be launched via LMS?
    - Is there a preferred format? (PDF vs EPUB)
    - Is there a platform preference?
      - Mobile
      - Desktop
        - Is your campus a “bring your own device” (BYOD) campus?
    - Determine eTextbook student license lengths (rental vs. non-rental)
    - Determine eTextbook faculty complimentary license lengths

LEARN

- » Courseware adoptions
    - Single publisher?
    - Multiple publishers?
    - Access code delivery?
    - Are shelf hang tags required?
    - Will there be a point of sale (POS) integration?

STATION 2: MANAGE

- Build your program/ensure items are adopted in Connect
- Acquire course materials and pricing
- Ensure SIS integration is live and students are enrolled in the appropriate courses
- Monitor progress of integration and course setup

STATION 3: DELIVER

- Monitor progress of integration and course delivery

STATION 4: LEARN

- Complete this checklist!
- Execute opt-in/opt-out communications

STATION 5: ANALYZE

- Monitor impact and engagement
- Gather stakeholder feedback
- Review lessons and outcomes
- Identify improvements for the future

VitalSource®

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Inclusive Access “Go-Live” Checklist

CT CAMPUS TECHNOLOGY (LMS ADMIN/COURSE DESIGNERS/IT SECURITY)

STATION 1: ADOPT

- Join the campus digital implementation team
- Review VitalSource’s VPAT and Accessibility statements
- Complete any privacy compliance reviews
- Configure SIS integration and begin sharing roster data with VitalSource

STATION 2: MANAGE

- Ensure SIS integration is live and students are enrolled in the appropriate courses

STATION 3: DELIVER

- Initiate any LMS integration and course setup
    - » Configure the VitalSource-provided consumer key and secret pair in the LMS
    - » Set up the link(s) in the appropriate master course or course sections
    - » If applicable, configure the Instructor Dashboards

STATION 4: LEARN

- Ensure LMS integration is live and students enrolled in the appropriate course can view content

STATION 5: ANALYZE

- Review lessons and outcomes
- Identify improvements for the future

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Inclusive Access "Go-Live" Checklist

PR PUBLISHER REPRESENTATIVES

STATION 1: ADOPT

- Secure Inclusive Access adoptions
- Confirm internally that requested content is available via VitalSource

STATION 2: MANAGE

- Work with institution to confirm pricing and deliver materials
- Ensure rights and pricing are assigned to the institution in VitalSource systems

STATION 3: DELIVER

- If applicable, check access code availability
- Conduct courseware training

STATION 4: LEARN

- Conduct first day of class presentations

STATION 5: ANALYZE

- Review lessons and outcomes
- Identify improvements for the future

LEARN

Inclusive Access "Go-Live" Checklist

IS INSTRUCTORS

STATION 1: ADOPT

- Select course materials for the upcoming term and submit to campus store
  - » Will you use courseware, eTextbooks, OER, or print materials?
  - » Obtain your complimentary desk copy

STATION 3: DELIVER

- If applicable, access your course materials via the LMS
  - » Prior to course start, work with campus technology to customize digital materials to the online course environment

STATION 4: LEARN

- Begin teaching course(s)
- Implement best practices for teaching with digital materials

STATION 5: ANALYZE

- Access Instructor Dashboards to monitor student engagement and identify at-risk students
- Review lessons learned and outcomes
- Identify improvements for the future

VitalSource **Bookshelf**

VitalSource Bookshelf gives students anytime, anywhere access to the materials they need to succeed. Instructors and students want quality learning materials that lead to successful learning outcomes. The world's leading platform for distributing, accessing, consuming, and engaging with those materials is Bookshelf—the eReader that can be accessed online or 100% offline on most devices.

Users

Students and instructors use Bookshelf. Students use Bookshelf to read, study, and engage with their learning materials. Instructors use Bookshelf to discover review materials for course adoption, plan their course, and engage with students using Assignments, shared notes and highlights, and more.

Key Features

- Easy navigation and search
- Notes and highlights
- Sharing of annotations
- Review Mode
- Flashcards
- Text-to-speech capability
- Offline capability on Mac, Windows, iOS, and Android devices
- Labs—get sneak previews of new Bookshelf features and leave us feedback so we can continue to improve your learning experience.

How to Access

Bookshelf is available online at https://online.vitalsource.com and via a variety of native apps for Mac, Windows, iOS, and Android. Students and instructors can visit their preferred app store or support.vitalsource.com for links to download Bookshelf applications.

Integration with VitalSource Product Suite

Bookshelf integrates with your campus LMS for seamless student and instructor access. Bookshelf also records real-time engagement activity, which is used to power VitalSource Analytics, including instructor dashboards, engagement dashboards, etc.

Training and Support

Your Customer Success Manager will provide you with details on Bookshelf training and support materials, including our Train the Trainer program. For a self-guided course on how to use Bookshelf, access our Bookshelf Introductory Course.

VitalSource **Course Dashboard**

The Course Dashboard provides a central resource for students and instructors to access all of the VitalSource resources adopted for their school's Inclusive Access program.

Users

Students can update their opt-out decisions and launch to their digital content from Course Dashboard . Instructors can view their digital content and launch to additional resources of interest, like the VitalSource Instructor Dashboard.

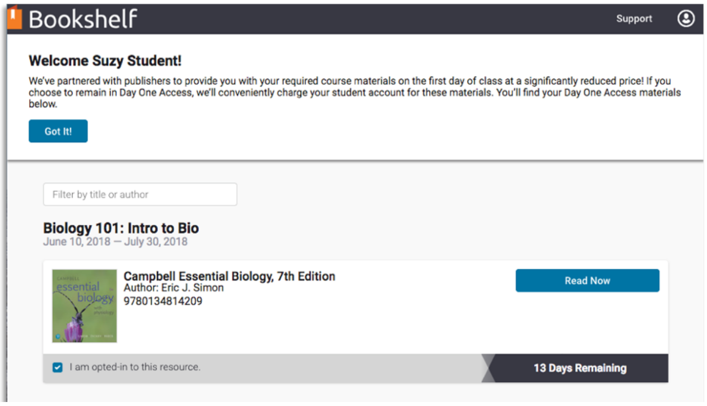
Key Features

- Users accessing the VitalSource Course Dashboard from their LMS will benefit from:
  - A seamless login experience.
  - A centralized location for students to manage their opt-out decisions and for instructors to access additional VitalSource resources, like our Instructor Dashboards for viewing student engagement.
  - Easy access to course materials.
  - Once in Bookshelf, users can enjoy features like notes, highlights, text-to-speech, flashcards, and search.

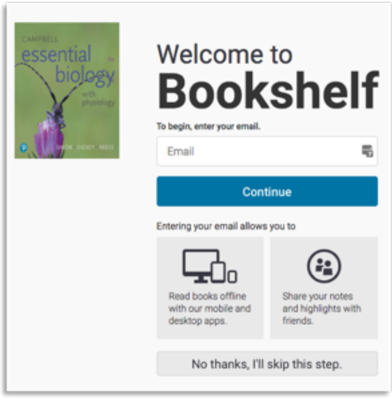
Student Experience

The first time a student launches one of their digital materials, they will see an interstitial sign-on page. They can choose to create or log in to a VitalSource Bookshelf account, or continue to their digital material without registering for an account.

Students will only see this screen the very first time they launch. After that, we'll remember their decision and take them straight to Bookshelf.



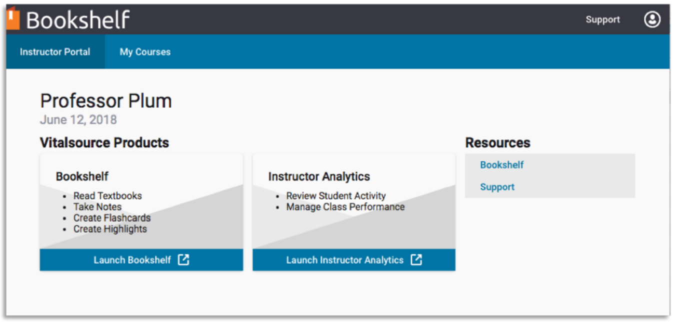
FIRST TIME VISITOR

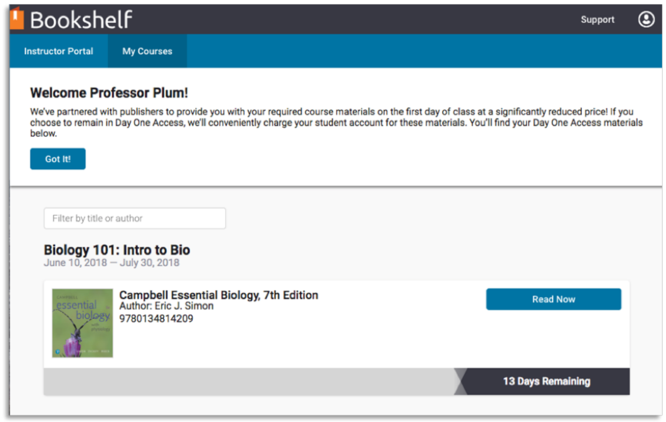


RETURNING VISITOR

VitalSource **Course Dashboard**

Instructor Experience





How to Access

Course Dashboard is accessible from your LMS. The configuration for the VitalSource LTI External Tool is quick and easy. You will need to work with the VitalSource Customer Success team to obtain your consumer key and secret. The team will also work with your bookstore to collect your digital adoptions and associate them with your courses. This allows you to use a generic link for all classes without adding a step for instructors to adopt the digital materials they have already chosen for their classes.

Integration with VitalSource Product Suite

Course Dashboard integrates with your LMS via our standard LTI integration capability. From Course Dashboard , VitalSource will SSO users directly into their Bookshelf accounts.

Training and Support

Your Customer Success Manager will help you determine the best user experience for your institution. The CSM will provide demos and training to make sure you feel comfortable with the integration and steps for both instructors and students.

ANALYZE

One of the premier benefits to using digital course materials is the ability to track student engagement and usage. This data allows you to determine intervention points in the semester at which it might be possible to get lagging students back on track. VitalSource has many different dashboards and reports that make it easy to see key data points such as page views, session length, device or platform, and opt-out rate by course and/or content. Use these metrics to track students during the term, and tap into them again at the completion of a semester to review growth and progress of the program as a whole.

AT THIS STATION, WE WILL COVER HOW TO:

- DM IL CT Monitor your program's impact and engagement
- IS Use instructor dashboards to monitor student engagement and identify at-risk students
- DM Gather stakeholder feedback
- ALL Review lessons learned and outcomes (all)
- ALL Identify improvements for future terms (all)
- ALL Consider whether to conduct an outcomes study (all)

AT THIS STATION, YOU MAY INTERACT WITH THESE PRODUCTS (BRIEF PRODUCT OVERVIEWS ARE PROVIDED FOR REFERENCE):

- Instructor Dashboard
- Engagement Data Feeds
- Operational Reports

ANALYZE

Monitor Your Program's Impact and Engagement

The data and analytics provided by VitalSource can be invaluable tools to measure progress of your Inclusive Access program. Once classes have started, it's recommended that the digital program manager make a point to review engagement data for students and faculty in the program. If your implementation team has previously agreed to success criteria, VitalSource's data can show you how your participants are tracking toward their goals.

Use Instructor Dashboards to Monitor Student Engagement and Identify At-Risk Students

One of our most popular analytics tools is the instructor dashboards. Easily accessible from the Course Dashboard or at analytics.vitalsource.com, the instructor dashboard is a great tool for faculty to quickly gauge student usage and engagement with course materials. By comparing the data from instructor dashboards to your students' grades and participation, you can get a clear picture of who is excelling in the course, as well as who may benefit from some additional help.

Gather Stakeholder Feedback

To prepare for term end, we recommend gathering feedback from all of the people who participated in the Inclusive Access program. It's important to understand all of the perspectives of your diverse team, including representation from the bursar's office, academic leadership, IT, faculty, and students. Hosting a town hall, sending out surveys, or opening up a virtual suggestion box are all great ways of soliciting input from your team and finding out what they thought about the semester.

VitalSource

ANALYZE

Review Lessons Learned and Outcomes

After you've reviewed the feedback from your participants, it's a good idea to do a formal lessons learned session as an implementation team. During this session, you can highlight key takeaways from the semester (both positive and negative), and summarize student engagement and performance.

Identify Improvements for Future Terms

The lessons learned will help you identify areas for improvement and growth in your next semester. Your VitalSource Customer Success Manager can help you change aspects of your program that you'd like to modify, as well as help you grow your participating student population and adoption size.

Consider Whether to Conduct an Outcomes Study

Our research has shown that engagement with the course materials early and often in the semester results in predictably better student outcomes. VitalSource would be happy to help you aggregate your engagement data with student outcomes data to help you identify the most accurate intervention point. This type of study is something that VitalSource is very familiar with, and your Customer Success Manager can guide you to make sure your program is getting the most out of our key insights.

VitalSource **Instructor Dashboard**

Manage is VitalSource's robust content management system. Clients can search for content, assign distribution rights, manage custom pricing, and receive access to VitalSource platforms and solutions.

Users

Instructors use the dashboard for the powerful data it provides, which unlocks insights into student study habits. The dashboard allows for timely intervention with potential at-risk students, and can help lead to improved outcomes, as well as inform content decisions.

Key Features

- Aggregate data on how long students spend in a study session and how many pages have been read
- Data availability at student, book, course, or institution level
- Smart filters for deeper dives where needed
- Data feeds based on the IMS Caliper standard

FUTURE-PROOF YOUR INTEGRATION

Using the dashboard, instructors can ensure that students are reading early and often. Our research suggests that students who have first-day access to course materials and interact with content regularly show higher retention rates and have better outcomes.

How to Access

The dashboard is accessible through your campus LMS for seamless instructor access.

Integration with VitalSource Product Suite

Engagement activity comes via Bookshelf, our world-leading digital content platform.

Training and Support

The dashboard contains a walkthrough to train users on the application. Also, your Customer Success Manager will provide you with details on training and support materials, including our Train the Trainer program.

VitalSource **Data Feeds**

The VitalSource engagement data feeds are based on the IMS Caliper standard and provide data from student interactions with their course materials.

Users

Institutional leaders can utilize the information gleaned from the feeds to customize student portals, deliver interventions based on recent behavior, power research projects, or simply see if students have completed a reading assignment before class.

Key Features

- Data is delivered in IMS Caliper 1.1 formatting
- Data can be extracted in near real-time or periodic pickup
- Data can be combined with data collected from other campus-wide analytics platforms for a holistic approach to student engagement and behavior

FUTURE-PROOF YOUR INTEGRATION

Data collected from the feeds can be used for powerful predictive analysis to better understand how student behavior can predict success and drive outcomes.

How to Access

Data can be accessed through the VitalSource platform and on a Google Cloud Storage bucket. The direct URL is https://analytics.vitalsource.com/auth/vst/multi_login. Talk to your Customer Success Manager about the best solution for your campus.

Integration with VitalSource Product Suite

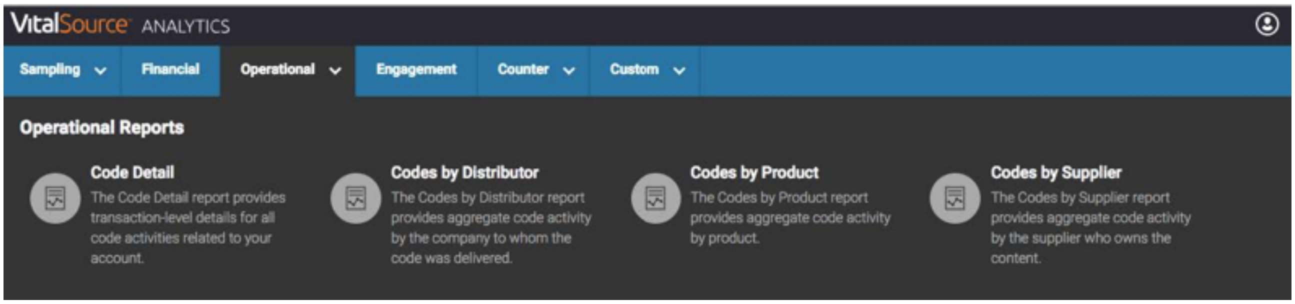
The data feeds are deeply integrated with Bookshelf, our world-leading digital content platform. Bookshelf powers the dashboards where the feeds are located. All activity that happens inside Bookshelf is recorded and stored.

Training and Support

Your customer success manager will provide you with details on engagement data feeds based on the solution that best fits your campus.

Operational Reports

VitalSource's suite of operational reports are specifically designed to facilitate easy access for you to see how your institution is interacting with digital content. Using these reports, you'll be able to see code activity from the last week, or even the last several years, in a matter of sections.



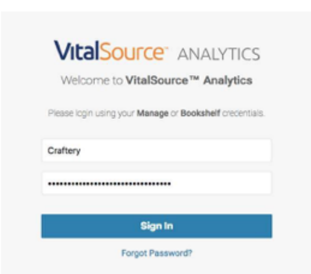
Users

Our reporting is designed to meet the needs of all of our customer types. Whether you're with an institution looking to review sales from last term or a publisher interested in seeing how your content is being distributed across channels, we have a report for that.

Key Features

See code detail, codes by distributor, codes by product, or codes by supplier to get a complete view of how your organization is consuming or distributing digital materials.

How to Access



Reports are accessible via the Analytics link in Manage or by visiting analytics.vitalsource.com directly using your Manage credentials. Depending on your role within your organization, you'll be able to access sampling reports, financial reports, operational reports, and even engagement reporting. Reports are organized by category within the Operational menu.

PRO TIP

VitalSource has conducted studies in partnership with our institutions to advise on best data practices. Ask your Customer Success Manager how you can get the most from your data with our analysis and resources.

Integration with VitalSource Product Suite

Bookshelf codes created by VitalSource's Manage platform are reportable through the Analytics site. Virtually all of your interaction with the VitalSource product ecosystem can be reported on through Operational Reports.

Training and Support

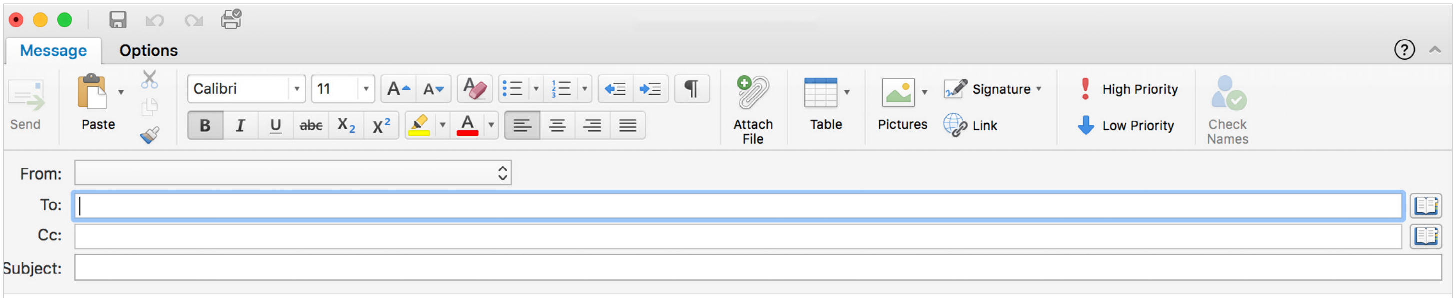
Your Customer Success Manager will be happy to help you find the report that is right for your analysis needs. Customer Success will help you navigate the platform as well as teach you best practices for reporting on your program.

APPENDIX

- Sample Email Template
- Project Plan
- Case Studies
- The VitalSource Accessibility Commitment
- VPAT
- Privacy Statement
- Leader in LTI
- Train the Trainer Materials

APPENDIX

External Email Template



Greetings, [Institution Name] team!

Verba/VitalSource is excited to partner with you to deliver digital content to your students and faculty. The first step for a successful implementation is to hold a kick-off call so that we may gather pertinent information and learn about your vision for your digital program. As your customer success manager, I will be facilitating this call between our teams.

Attached to this email is a guide to help you prepare for our kick-off call. In order to ensure a productive meeting, please review the document in advance of the call and prepare any questions for discussion.

You will have a team of people supporting the progress towards the launch of a digital program at your institution. Below is a brief introduction of each person who will be working with you during the initial phases and beyond.

[Account executive name], Account Executive
[AE name] was responsible for introducing you to VitalSource. He/She will be available to you even after your launch should you have any questions about your contract or have interest in additional Verba/VitalSource solutions.

[CSM name (s)], Customer Success Manager(s)
[CSM name (s)] will be your main point of contact throughout your digital program journey. I (we) will assist you with resolving any issues that arise and be your go-to person for anything related to your digital program initiative with Verba/VitalSource.

Please provide some dates and times that your team would be available for a one-hour kick-off call. It is important that the campus technology person (i.e. the learning management system (LMS) administrator or course designer) is available for this call.

Thank you. We all look forward to working with you!

APPENDIX

Project Plan

VERBA | VitalSource

Digital Implementation Project Timeline

Academic Term	[Implementation Term for Digital Adoptons]	CAMPUS NAME	[Institution Name]
DIGITAL PROGRAM MANAGER	[Project Manager's name]	LAUNCH DATE	Wednesday, August 1, 2018

PHASE	Personas:	DETAILS	Number of days before launch		Date Range	
1	Digital Program Manager	Determine digital strategy	180	120	February 2, 2018	April 3, 2018
		Start collecting textbook adoptions	150	75	March 4, 2018	May 18, 2018
		Print Buyback Period - helps determine digital/IA adoptions	130	60	March 24, 2018	June 2, 2018
		Begin faculty recruitment process for upcoming IA Programs	120	90	April 3, 2018	May 3, 2018
		Build Program/Ensure items are loaded into Connect	90	60	May 3, 2018	June 2, 2018
		Adoptions for Summer/Fall are due	60	45	June 2, 2018	June 17, 2018
		Ensure SIS integration is live	60	30	June 2, 2018	July 2, 2018
		Finalize IA Adoptions	60	30	June 2, 2018	July 2, 2018
		Charge Student Accounts	-25	-15	August 26, 2018	August 16, 2018
2	Campus Technology (LMS Admin / Course Design / IT	LMS Upgrades/System Maintenance	90	60	May 3, 2018	June 2, 2018
		Ensure SIS integration is live	60	30	June 2, 2018	July 2, 2018
		Course Copy Process	50	20	June 12, 2018	July 12, 2018
		Course Link Creation	50	20	June 12, 2018	July 12, 2018
		Course Back Up Process	50	20	June 12, 2018	July 12, 2018
3	Publisher Representatives	Secure IA adoptions	200	100	January 13, 2018	April 23, 2018
		Work with institution to confirm pricing and deliver materials	190	75	January 23, 2018	May 18, 2018
		Create access code availability	100	75	April 23, 2018	May 18, 2018
		Conduct courseware trainings	60	15	June 2, 2018	July 17, 2018
		Conduct first day trainings	10	-10	July 22, 2018	August 11, 2018
4	Instructors	Select course materials	160	75	February 22, 2018	May 18, 2018
		Familiarize yourself with Bookshelf	160	5	February 22, 2018	July 27, 2018
		Teach your course using enhanced digital materials	0	-120	August 1, 2018	November 29, 2018
		Monitor engagement, reach out to at-risk students	0	-120	August 1, 2018	November 29, 2018
5	Students	Make decision to opt-in or opt-out of digital course materials	1	-14	July 31, 2018	August 15, 2018
		Learn using Bookshelf's enhanced study tools	1	-120	July 31, 2018	November 29, 2018
6	Customer Success Manager	Guide all stakeholders through program set up	180	ongoing	February 2, 2018	Ongoing
		Quarterback catalog development	120	30	April 3, 2018	July 2, 2018
		Use technical expertise to ensure seamless integration experience	120	-120	April 3, 2018	November 29, 2018
		Provide 24/7 support for instructors and students	60	-120	June 2, 2018	November 29, 2018
		Conduct outcomes study in partnership with institution	-10	-180	August 11, 2018	January 28, 2019

Access the project plan template.

APPENDIX

Case Studies

How West Shore Community College Bookstore Pulled Off the Perfect Inclusive Access Pilot

How Colorado State University Bookstore Ditched Spreadsheets to Drive Inclusive Access at Scale

Fresno State Saves Big With Successful Inclusive Access Pilot

University of Missouri Saves Students $7 Million Over Three Years

APPENDIX

The VitalSource Accessibility Commitment

At VitalSource, we have a long-standing commitment to meet the needs of learners of all ability levels. For nearly two decades, we have worked to ensure our products are designed from the beginning with accessibility in mind.

AN ACTIVE PART OF THE ACCESSIBILITY COMMUNITY

VitalSource works closely with key members of the disability and advocacy communities who are committed to accessibility. We work with organizations such as the W3C, DIAGRAM Center, Book Industry Study Group, the Center for Accessible Materials Innovation, and the EDUPUB Alliance (EPUB for Education). We conduct user studies and a variety of research and usability studies on assistive technology use and on product prototypes. We collaborate with consultants and advocacy groups, such as the National Federation of the Blind, JISC, Tech for All, and others to grow the community and the capabilities of each part of the system working together. VitalSource goes beyond simply adhering to industry standards, as we are also actively involved in helping create those standards through participation and leadership with these partners.

TRANSPARENCY

Solving the needs of learners requires a great deal of collaboration and accountability. VitalSource demonstrates its Section 508 compliance by publishing the VPATs for its products. But our commitment goes beyond mere compliance. We are transparent about our capabilities because learners and partners need to know how we meet their needs.

NEED AN ACCESSIBLE ETEXTBOOK?

While we work with each of our publishing partners to provide accessible content that works with our platform, we recognize that this goal is not always possible to achieve. When an alternate format file is required, we will work with the publisher to understand what options are available and how to best provide the necessary accommodation in coordination with the appropriate departments at the institution. A request for a particular title to be enhanced for improved accessibility can be sent directly to the publisher contacts, or we can assist in the process by submitting this form.

VitalSource®

APPENDIX

ACCESSIBLE PUBLISHING

Created in collaboration with the BISG Accessible Publishing Working Group, VitalSource is pleased to help with the publication of the BISG Quick Start Guide to Accessible Publishing. This guide serves as the model for best practices in creating accessible digital content. This eBook offers a succinct introduction to the basics of accessibility, legal requirements, top tips, very practical advice on producing accessible content, and much more. You can obtain a free copy in English, French, Italian, German, Spanish, and Korean by visiting our store.

ACCESSIBILITY SUPPORT

We have a team of accessibility specialists to assist customers with questions or other needs. Customers in North America can visit our 24/7 Technical Support site anytime at https://support.vitalsource.com. We respond to most issues within 24 hours. You can also email your accessibility issue to accessibility@vitalsource.com or visit https://vitalsource.com/accessibility.

VITALSOURCE BOOKSHELF ACCESSIBILITY

Select the Bookshelf platform below for more information on how to use the platform, accessibility tips and issues, and accessibility documentation:

- Bookshelf for Windows
- Bookshelf for Mac OS X
- Bookshelf iOS App
- Bookshelf Android App
- Bookshelf Kindle
- Bookshelf Online

APPENDIX

VPAT

VitalSource is committed to providing rich, highly functional, long term solutions for the needs of the accessibility market. We are committed to working with partners to provide regular review and evaluation by actual users, and to make our solutions widely available. We will accomplish this primarily by taking advantage of the built in solutions provided by the computer or devices operating system, or by supporting open source alternatives. Additionally, we will work with the leading third-party vendors in the market to provide support for those users where possible. More information regarding VitalSource's commitment to accessibility can be downloaded here.

APPENDIX

Privacy Statement

WE ARE COMMITTED TO PROTECTING THE PRIVACY OF OUR USERS.

For VitalSource—and our educational and large business customers—data privacy and security has always been a priority. Our goal is to provide our customers with the tools to support our mutual commitment to user privacy.

Our privacy page offers our educational and corporate customers a quick reference and answers to frequently asked questions on how we handle privacy and comply with global privacy regulations. The information on this page is meant as a quick reference. For full details, please refer to our full privacy policy here.

As a global company with users in over 240 countries, we monitor and support dozens of privacy regulations. To learn more about how we support privacy regulations in your region, see the Global Regulations section.

APPENDIX

Leader in LTI

VitalSource leverages many IMS Global standards; their largest adoption by far is Learning Tools Interoperability (LTI), which provides the foundation for a seamless single sign-on and content provisioning experience for users launching from an LMS to learning tools such as Bookshelf. New VitalSource LTI integrations can usually be set up in a matter of minutes. Gone are the days of endless back-and-forth with LMS admins and software developers hashing out custom integrations! VitalSource supports over 1,000 LTI integrations with nearly 56 million LTI launches in the last year alone. LTI integrations save time, effort, and headache, and allow schools, educators, and technology partners to focus on what is really important—teaching and learning. *IMS Global Learning Consortium 2017 Annual Report*

APPENDIX

Bookshelf Train-the Trainer-Materials

Bookshelf Train-the-Trainer is a program designed to prepare clients to take over product training with their end users. Participating in the program will help to build a better understanding of the user experience, increase the aptitude to support end users, save time in training new faculty and students, and open communication with VitalSource to suggest new feature improvements.

AFTER PARTICIPATING IN TRAIN-THE-TRAINER, BOOKSHELF TRAINERS WILL:

- Be proficient in navigating the applications in the platform
- Teach course designers and/or faculty how to model behaviors for learners
- Identify real-world application of the Bookshelf tools
- Focus on the end result of learner adoption and use

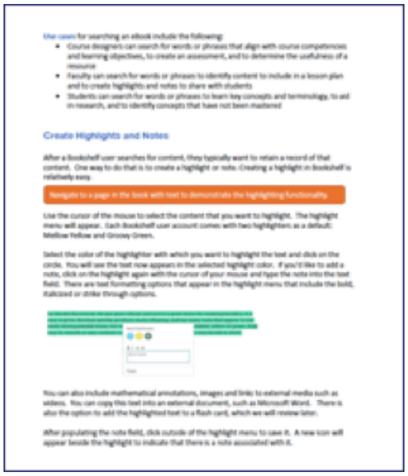
Before you get started, your Customer Success Manager will assess your readiness. If you fit the ideal client profile for the program, you will then work with the Success Manager to complete the [Bookshelf Training Client Assessment] to decide on the logistical details of the Train-the-Trainer delivery.

AS A TRAIN-THE-TRAINER PARTICIPANT, YOU WILL RECEIVE THE FOLLOWING RESOURCES:

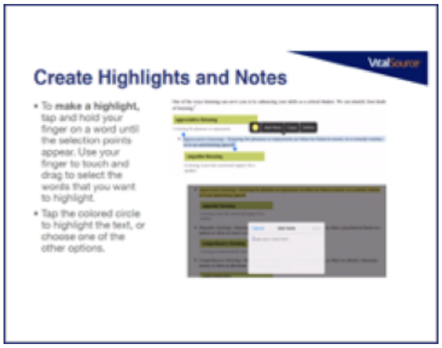

VitalSource
Bookshelf Training
Client Assessment

Planning tools: These documents will help the trainer to address the details involved in planning a training event. They include trainer notes, a training assessment, material selection form, agenda templates, training evaluation, and certificate of completion.

APPENDIX



Training scripts: One script is provided per application (Bookshelf Online, mobile, and desktop) to guide the trainer in the appropriate explanations of the platform's features and use cases for the audience.



Presentations: One PowerPoint presentation is provided per application to use in the event of a loss of internet connectivity.

Activities: Five learning activities are provided to supplement the instruction, encouraging trainees to engage with the applications and learn to articulate the platform's functionality, benefits, and solutions.

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