Adoption & Analytics Portal

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

Key benefits include:
• Time savings and improved productivity for Faculty and Administrators
• Streamlined communication; as the portal replaces multiple email chains and interoffice memos
• Access to course history and a recommendation engine highlighting additional high-quality, low-cost options
• Transparency and clarity around course materials pricing and process deadlines
• Enhanced reporting and analysis for Administrators

In this document we will review how Administrators can use the portal to setup a term, add and review adoptions, contact Faculty, view reports, and more. Key features will be highlighted along the way.

How to Access the Adoption & Analytics Portal
To access the Adoption & Analytics Portal simply go to your school’s Online Bookstore website, powered by TextbookX. Click the “Faculty” button in the header, and login using your Administrator credentials.

Having trouble logging in?
Log in using your Administrator username and password (these should be the same credentials you use to login to your school’s system) or the credentials provided to your by your Account Manager.

Please contact your Account Manager if you are having any trouble.

NOTE: Administrators will only have access to view and edit courses within the term, campus, and departments assigned to them. For example, a global Administrator will be able to edit all courses and term information, while a campus or department chair will only have the ability to view and edit courses within their respective campus or department.
Part 1: Term Setup

Since your school has integrated with the Online Bookstore, a lot of crucial information for each term will be pulled into the Adoption & Analytics Portal automatically.

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

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

At the top of the “Home” page there will be a timeline for the upcoming term. This timeline will appear for all Faculty and Administrators when they log in. It is important for the global administrator to add key dates and milestones so Faculty can easily reference deadlines. You can drag and move the timeline to display prior or future events within the term selected.

Click the “Edit” button to edit, add, and remove dates from the timeline. At a minimum, we recommend Global Administrators work with their Account Manager to establish and add the following dates into the timeline:

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

Term start and end dates will be pulled automatically from the term’s booklist and cannot be edited.

When you are done adding all the key dates and milestones, simply click the “Close” button to return to the Home page.

To review the timeline for a different term, use the drop down menu located just above the timeline.
**Edit Users**

While Administrators will not be able to edit user information pulled directly into the site, they can visit the User page to view account info and to add, remove, or edit other Administrator users.

To view user details, simply click on the user’s name and a pop-up will appear.

When viewing a Faculty user, all courses assigned to that user will be listed beneath “Assigned Courses.”

Administrator user details will display what level of access the user has (ie. what departments are assigned to their account).

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

- First Name
- Last Name
- Username
- Email
- Password

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

Once you have added all the user details, click “Create” to add the Administrator to the system.
Add Recommended Items

During the adoption process, Faculty are shown recommended items based on the subject category of the course selected. Contact your Account Manager to discuss overriding these recommendations with specific materials.

Below are some examples of override recommendations that can be made:
- Graphing calculator for all Math courses
- Lab Coats and Goggles for Chemistry courses
- Online Tutoring for any subject area
Part 2: Adoptions

Administrators can review and edit faculty adoptions or add their own adoptions for a course. Administrators can also make bulk adoptions through the Quick Adoption Loader tool. Changes and updates made to a course will be saved in real-time.

Review Status of Faculty Adoptions

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

<table>
<thead>
<tr>
<th>Incomplete Courses</th>
<th>Completed Courses</th>
<th>Needs Administrator Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>119</td>
<td>46</td>
<td>14</td>
</tr>
<tr>
<td>No Faculty Submission</td>
<td>Completed Courses</td>
<td>Needs Administrator Review</td>
</tr>
<tr>
<td>Incomplete Faculty Submission</td>
<td>Needs Administrator Review</td>
<td></td>
</tr>
<tr>
<td>Not Submitted</td>
<td>Needs Administrator Review</td>
<td></td>
</tr>
</tbody>
</table>

For a more detailed report of adoption status, visit the Courses page.

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

Use the search bar at the top of the page to search for a particular instructor or course or use the drop down menu and panel on the left of the screen to filter options by a particular term, department, course, or adoption status.

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

- **All Courses** (default): Results include all courses assigned to the term/department selected in the top drop-down menu
- **Completed**: Results include courses where adoptions have been submitted by Faculty and approved by Administrators
- **Incomplete**: Results include courses where Faculty have not yet started the adoption process
- **Not Submitted**: Results include courses where Faculty began the adoption process, but did not submit adoptions for review
- **Needs Review**: Results include courses where Faculty have submitted their adoption, however Administrator have not yet reviewed/approved the adoption

<table>
<thead>
<tr>
<th>Status</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Courses</td>
<td>165</td>
</tr>
<tr>
<td>Completed</td>
<td>46</td>
</tr>
<tr>
<td>Incomplete</td>
<td>6</td>
</tr>
<tr>
<td>Not Submitted</td>
<td>99</td>
</tr>
<tr>
<td>Needs Review</td>
<td>14</td>
</tr>
</tbody>
</table>
Contact Faculty

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

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

Once an eligible instructor has been selected, a “Notify Selected Instructors” button will appear. Click that button to send the automated email (set up in the system) to all those selected. Note, the portal will not allow you to email instructors who have been notified within the past 24 hours regarding the course(s) displayed.

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

- **Multi-Course Email**: If you click “Notify Selected Instructors” when results are displayed by professor, the professor will get an email that lists the adoption status for all courses assigned to them for the designated term. For example, the professor will receive 1 email with all 4 of their courses listed, along with the adoption status of each (incomplete or complete).

- **Course View Email**: If you click “Notify Selected Instructors” when results are displayed by course, the professor will get a unique email for each course that appears in the search results. For example, the professor may receive 2 unique emails; each email would be specific to one of their two incomplete courses.

In both cases, the email will provide a snapshot of what Faculty see when they log in to the Adoption & Analytics Portal. Links will direct them to the designated location where they can fix any outstanding issues. A copy of all emails you send will appear in the “Notifications” section of your Home page.
Approve Faculty Adoptions

To begin review of pending adoptions, click the “Needs Review” filter on the Courses page. Then click the course name of the first course you want to review and approve.

On the right hand side of the course detail page you will see a list of all books currently adopted to that course (scroll down to see additional materials). If no changes need to be made, simply click the “Mark Reviewed” button for each book.

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

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

- Click next to review the ancillaries, course notes, and course files associated with that course
- Click back to the Courses page to go to the next course that needs your review
Add Adoption to Course

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

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

Winter 2015
PSYCH 201 - General Psychology (Class nbr - 30165; Session: REG)  Next  Add Course Notes

Dana Alston

All steps for adoption will be listed on top of the page so you can track where you are in the process.

No Books Required

If the course does not require textbooks, simply check the box next to “This course does not use textbooks” and click “Continue” to continue setting up the course.
Adopt a Textbook
If the course does require textbooks, you can use the search box, course history, or recommendations to find the book you wish to adopt. You can also choose to create a custom CoursePack.

1. **Search Box**: Enter a book title or ISBN in the search box. As you begin typing, a list of books will appear – continue typing to narrow the results. If a book does not appear, please confirm the ISBN number is typed correctly. Notify your Account manager if the ISBN needs to be added to our system.

2. **History**: Review books that have been assigned to this course previously. Books that you have assigned to this course in previous terms will automatically appear. Click “View All History” to view your full course history (all books you have assigned to this course in prior terms) and department history. Department history will show all adoptions made by other Faculty for this same course.

3. **Recommendations**: Review all recommended materials. Recommendations may be based on the subject category of the course, or may have been chosen by an Administrator at your school.
4. **CoursePack**: Create a custom CoursePack for the course. When you click the “Add Coursepack” button you will be taken to the CoursePack creation tool. Follow the on-screen process to create your custom CoursePack and add it to your course.

CoursePacks are a great way to build custom materials for a course. Selections from books, articles, magazines and other literature, in addition to course notes, PowerPoint slides, course syllabus and other handouts may be combined into one CoursePack. Many instructors take advantage of this low-cost option.

Click “Back to Admin Mode” to return back to the Adoption & Analytics Portal.
Once you click on a book, you will be taken to a book detail page complete with bibliographic information, pricing details, and edition alerts (when applicable).

The pricing section offers a real-time snapshot of student pricing and is subject to change based on availability and inventory sourcing.

If there is a new edition alert, click “view” to see a comparison table of the two editions.

After reviewing all book details, click “Adopt” and the book will be added to the course. Once a book is added, it will appear on the right hand side of the screen. By default, the book will be listed as “Required” and “Used Ok.”

- If the book is optional please change that selection
- If you have a custom bundle, or a book that requires an access card, you should update your “Used OK” selection to “New Only”

If you decide that you no longer want to adopt that book, you can click “Delete” at anytime.

After adding all the textbooks and/or Course Packs you want to assign to the course, click the “Next” button at the top of the page.
Add Ancillary Materials

Ancillary materials can be added to the course during step 2 of the adoption process. Recommendations may include items related to the books you have adopted (study guides, supplements, etc.) to the course or may be materials selected by an Administrator.

If you want to create a CoursePack of handouts, course syllabus or other related items, you have the option to do so again here.

Click “Skip this Step” if no ancillaries need to be added to the course.
Add Course Notes

Notes and files can be added to the course during step 3 of the adoption process. Any note or file that is added here will be displayed to students when they are viewing your course at the Online Bookstore.

After typing a course note, and editing the font type, click “Save” to add it to your course.

If you want to add course files, such as a syllabus, PPT slides, or handouts, you can drag and drop the file from your computer, or click “Add Course Files” to select the file location from your computer. Click the pencil next to the file name to edit how the file is displayed to students.

Once all course notes and files have been added, click “Next” at the top of the page.
Preview Course
The course preview page will show you what the course will look like to students when they are shopping at the Online Bookstore.

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

If you need to make any changes to course, click the “Add More Materials” button at the top of the screen, or click the relevant step in the adoption process.

Click “Submit” found at the top of the page to complete the adoption. When Administrators submit a course adoption it will be automatically marked as “complete” and will not need additional review.

After submission, a confirmation page will appear. Faculty can copy and paste the direct link to their course in their syllabus or in other student outreach.

Course Submitted!

You submitted this course on June 14th, 2015

✓ Books Added
✓ Ancillaries Reviewed
✓ Course Notes Reviewed

Share a link to your course in a syllabus or learning management system:

http://occtest.textbooks.com/institutional/index.php?action=browse#b...
Add Course Adoptions in Bulk

Administrators can use the “Quick Adoption Loader” to upload course adoptions in bulk. The tool can be accessed through the Tools tab.

The Quick Adoption Loader:
- Enables Department Chairs to post book adoptions in a more efficient manner
- Allows Administrators to adopt multiple textbooks to their assigned departments and courses in a single session

![Quick Adoption Loader](image)
Part 3: Reports
The Adoption & Analytics Portal has added enhanced reporting capabilities for Administrators. In addition to checking sales and financial aid reports, Administrators can now track the status of adoption in real-time.

Home Page Reports
The Home page is the best way to get an overview of adoptions for the upcoming term. All data on this page is updated in real-time.

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

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

- **No Faculty Submission**: Faculty have not yet added any materials to their course
- **Incomplete Faculty Submission**: Faculty have added adoptions to their course, but have not yet submitted their adoptions
- **Needs Administrator Review**: Faculty have submitted their adoptions and an Administrator needs to review

The number of courses with complete adoptions will be highlighted in green. These are the courses where Faculty have submitted their adoptions and they have been approved by an Administrator.
The “Materials” box will display notifications from the Akademos inventory team. The number of submitted adoptions that are on backorder or have new editions will be highlighted here.

Below the materials box, there is a breakdown of adoptions by sub-department. If you are looking at the full term, you will see a breakdown by campus or department (depending on the set up of your school).

This is a great way to compare the adoption rate of departments.

The notifications panel will list all emails you have sent to Faculty through the Adoption & Analytics Portal. Click on “See All” to see a full list of your outbound messages and search by date range. Click on an email name to see a copy of the email that was sent. In the preview pane, you will also have the option of resending the email.
Sales Reports

Administrators will still have access to real time sales reports, found on the Reports page.

The real-time sales report allows you to compare key statistics (sales, savings, orders, items, average items per order, average cost per item, and % financial aid) against the prior year. On the right you will also see a breakdown of book type.

Administrators can also filter results by date, customer name, order number, ISBN/Title, or Department. Be sure to click the “Apply Filter” button to update the results.

Part 4: Questions?

Visit the Help page in the portal to view detailed user guides and how-to videos. Contact your Account Manager if you have any additional questions.