QUICK START GUIDE

BY

Academy of Mine

STEPS

01 Introduction

The Quick Start Guide has been created for our clients to help them get comfortable with their new platform and provide a clear step-by-step process for configuring their LMS. Below you will find the most important steps to consider when building out your platform, listed in the order that works best for the majority of clients.

Nonetheless, with our large client base of many different types of businesses we have seen that some steps may be more important than others. As such, clients that use our platform to provide internal training to employees may not leverage our eCommerce functionality and perhaps will not need to set up Products. Clients that are selling courses in bulk to multiple organizations certainly will consider using our Groups feature to scale this process but business-to-consumer clients may decide to refrain from doing so.

We have therefore segmented the steps in *Required* and *Optional* steps, presented in that order. For the steps 08 to 12 you will also see an optional tag that indicates that the necessity of completing the step largely depends on the nature of your business and use case for the LMS. Furthermore, the order of these steps is largely suggestive and you will certainly want to consider running some in parallel. The course creation step, for example, is often a longer process that should be started as early as possible but will take some time to complete for most clients (certainly if content is still to be built from scratch). It is a good habit to complete other steps in the meantime when possible.

With each chapter below, you will find links to related help articles and video tutorials originating from our Help Documentation that will guide you through the process. Many of these will seem rather straightforward to you, though for some steps you will certainly benefit from having the resources at your disposal.

If you are ever running into complications during the set up and the help articles are not resolving this for you, you can always reach out to our incredible support team at help@academyofmine.com who will be happy to help.

Lastly, we recommend starting with our Video Tour of the Admin Dashboard (12 min), as it will provide you with a basic understanding of the framework and organization of your new platform.

02 Admin Users

The very first thing we want to do is make sure that all our team members that need full administrative access to the platform have been set up with their Admin account. The platform has a couple of different user roles, with the Admin role providing full privileges to configure the LMS. The Academy of Mine team has already provided you and perhaps some colleagues with an account when initiating the platform but it is good to make sure any other critical team members also have the access they need.

To learn more about Users and setting up Admin accounts, see Introduction to Users.

03 Branding

This step is incredibly easy but it is a lot of fun. Changing the branding settings for your platform to match those of your business really makes the LMS your own right off the bat. You can change the platform logo, theme color, and more, to make sure you and your students truly feel they are engaging with *your* platform.

To learn how to change the Branding of your platform, see Customize Your Branding

04 General Settings

The next thing we want to take care of are the General Settings of our platform. This is just to make sure that values such as the title of the site, the default timezone, and date formats, are set according to your preferences. This is not incredibly exciting but important to take care of right away.

To learn where to change the General Settings, see Platform General Settings

05 Menus & Pages

This is the first step where the configuration will differ substantially between clients. Some clients already have a marketing website and are simply looking to link to their new LMS. Others are looking to build many landing pages and use the platform also for marketing purposes. What approach fits best for you is something you will want to think about with the team. In particular, the main consideration here will be “How are we getting students to the LMS?”. It may very well be that you are indeed looking to direct potential students from your existing marketing website to the Course Catalog of the LMS and you do not need any other pages hosted here. Or perhaps you would like to create one or more additional pages after all on your platform that will provide additional information to visitors.

Menus & Pages tie into each other here. Once you have determined what pages you would like to host on your platform and what pages you already have on an external marketing page and may simply want to link to, you will also have an idea of what links you want to show in the website menu of your platform. It may even be that you do not want any pages in addition to your LMS, not even the Course Catalog (we see this often for clients that use our system for internal training).

To learn more about creating Pages and configuring Menus, see [Introduction to Site Pages]

06 Courses

Courses are the meat and potatoes of your platform. What is a Learning Management System without Courses? Creating your courses, however, is for most clients also the most intensive process. It’s a process that starts with thinking about the end product that you are looking to provide to your students. Once you have a clear picture about how the students should be consuming the content, you will be better able to structure it across Products, Courses, Sections, and Modules. It is therefore also important that you understand these different constructs and how they relate to each other.

A course is the single item that a student is enrolled into, it has a title, an expiration date (if set), potentially a certificate that can be earned upon completion of the course, and it is the object that has student progress tied to it. As a student, when I am looking at my Dashboard, I will see the courses that I am enrolled into and I can choose to launch a course right there. The actual educational content that is provided in the course is its curriculum.

The curriculum of the course is built up out of Modules that are ordered based on your preferences. As such, a very simple curriculum may start with a video module, followed by a PDF module, followed by a quiz module which acts as a final exam. A more complex curriculum may contain dozens of modules from all different types.

Sections are very convenient for dividing the curriculum in logical increments. They act more as a visualization than anything else but they will break a long list of modules into different sections, grouping them together and making it more digestible. As such, a curriculum of 20 modules may have an Introduction section that contains 4 modules, followed by a Part I, and a Part II that each contain 8 modules.

We have briefly touched on the relation between Courses, Curriculum, Sections, and Modules there. These all relate to how the student is consuming your educational content. There is one remaining item to complete the list, and this is called Products. In step 09 we will dive into the creation of Products a bit more but let us briefly touch on them here as they will play a role in how we think about providing courses. As mentioned, a student will only see courses in their Dashboard that they are enrolled in. The question then becomes: “how do students get enrolled into courses?” This will depend on how you are looking to use the LMS and varies a lot among clients. The main distinction is whether you want your courses publicly available for purchase or self-enrollment, or whether students will only be enrolled by administrators. If we decide that we indeed want students or organizations to be able to purchase or enroll into courses by themselves, we will want to create Products. Products are the items that show in the Course Catalog page of our website and are what makes this self-enrollment possible. A student or organization purchases a Product that *contains* one or more courses. As such, we can create a Product that simply provides enrollment into one course. However, we can also create a Product that enrolls into multiple courses, allowing us to create different bundles or packs if you will.

Now that we understand the relationship between these different concepts, we can determine how we would like to structure our courses and provide our educational content.

To learn more about creating and managing courses, and the different types of modules, see [Introduction to Courses]

07 Automated Emails

The platform automatically sends out emails to users based on a variety of events. As such, anytime a new account is created in the system - whether via self-enrollment or by admin creation - a New Account email is sent out which has a template associated with it, sharing the login credentials with the user. Similarly, when a student is enrolled in a course a Course Enrollment email is sent out which has its own template. There are over 15 different email templates with associated triggers that are automatically sent out, which can be disbaled/enabled, and for which you can customize the template including dynamic shortcodes that are replaced with the correct values (such as student name, course name, password, and so forth).

To learn more about the different automated email templates and how to edit them, see [Introduction to Automated Emails]

You have finished all the base steps for configuring your platform. Depending on the nature of your business and the use-case of your LMS, you will want to take a look at the additional steps that follow - such as creating certificates, configuring eCommerce settings, and more - and determine whether they are required for the configuration of your platform.

08 Certificates

optional **Only for clients that are looking to award their students with certificates upon completion of a course.**

Many of our clients are leveraging our automated certificate issuance functionality in their LMS, allowing them to award students with a certificate when they meet the grading criteria specified. Clients can set up a base certificate template that is populated with many dynamic fields such as course name, student name, issuance date, course credits, and more, which will all be filled with the appropriate data when a student earns the certificate.

To learn more about how certificates can be used in the platform, see Using Certificates of Completion in the Platform

09 eCommerce

optional **Only for clients that are looking to sell courses through their platform.**

If we would like to sell our courses directly via the catalog of our platform, whether to individual students or organizations, we will have to make sure our eCommerce is configured properly. In particular, we want to update the general eCommerce settings and decide to integrate with one of the eCommerce gateways that the Academy of Mine platform provides. Only when this integration is completed can we start accepting payments through the platform.

To learn more about configuring the eCommerce functionality, see Introduction to eCommerce

10 Products

optional **Only for clients that are looking to sell courses directly from the platform, or that want to make courses available for free self-enrollment.**

If we want to make courses available for students and organizations as such that they can self-enroll (whether paid or free), we will have to create Products which will show in the Course Catalog of the website. As indicated in the 05 Courses step, the items that show in the Course Catalog are actually Products that *contain* courses. When a student purchases a Product or uses it for free enrollment, they get enrolled in the courses it contains.

To learn more about how Products are used in the platform and how to create them, see Using Products to Offer Course Enrollment

11 Integrations

optional **Only for clients that want to leverage one of the many integration options of the LMS.**

The Academy of Mine platform allows clients to integrate with a variety of 3rd party applications. Perhaps you are looking to use Zoom or GoToTraining for your Webinars, you would like to send data to a 3rd party CRM when a student completes a course, or you are looking to set up a Single-Sign On with your existing employee system, the Integrations tab is the place to enable and configure these.

To learn more about the different Integrations your platform enables and how to configure them, go to your Integrations tab in the Admin Dashboard, and search our Help Documentation for tutorials on your specific integration.

12 Groups

optional **Only for clients that are looking to sell course seats in bulk to organizations or institutions.**

The Groups feature is one of those that gets clients incredibly excited. It has been developed based on feedback from B2B clients over the last years with the goal of allowing them to scale the selling of course seats in bulk. In short, the Groups feature allows clients to create different Groups that get their own administrator (a Group Admin), and allow them to delegate student management to said Group Admin. As such, they can create a Group for an organization they are selling their courses to, assign a representative of the organization as Group Admin, and assign the Group with a set number of seats to specific courses. Now, the Group Admin can issue those seats to their employees or students, enrolling them into the courses, and manage her own students.

Whether clients are executing their B2B sales off-platform and prefer to manually create the Groups, or they want to allow organization representatives to purchase multiple seats to a course via the Course Catalog, it is important to understand the core functionality of the Groups feature and how to set the permissions of the Group Admin role.

To learn more about how to leverage the Groups functionality, see [Introduction to Groups]