Platform Configuration Playbook for the Academy of Mine LMS

This playbook is created for our new clients to help them configure their platform for launch. Each step has one or multiple associated help articles that originate from our Help Documentation, which is a great place to learn more about the different functionality of your LMS. If you still have a question left unanswered, be sure to reach out to our support team at help@academyofmine.com.

❏ **1. Admin Users are created.** All Client Admin users are created for me and my colleagues that need access to the platform.
Introduction to Users

❏ **2. Custom branding has been applied.** The branding settings are changed for our platform to make it fit with the branding of our business (e.g. a custom logo, new theme color, etc.).
Customize Your Branding

❏ **3. General settings have been configured.** The general settings of the platform have been configured.
Platform General Settings

❏ **4. Website menu is changed and pages are removed/edited/added.** We have thought about what pages we want to show on the website of the LMS, as well as what links we want to show in the navigation menu of the website, and we have configured these to our liking.
Introduction to Site Pages

❏ **5. Courses and modules are created.** The courses are created with all their associated information, we have created/added all the modules that are part of the course, and we have tested them by enrolling ourselves in the courses and going through it.
Introduction to Courses

❏ **6. Certificates are created and linked to Courses.** (Optional) Certificate templates for the certificates that we want to issue upon the completion of the course have been created, we have linked them to the courses, and have set the grading criteria that determines when somebody should receive the certificate.
Creating a New Certificate & Creating and Updating a Course - Grading & Certificates

❏ **7. eCommerce settings and payment gateway have been configured.** (Optional) We have thought about whether we want to make courses available for purchase via the Course Catalog of the LMS website, and if so, have configured the eCommerce settings and integrated a payment gateway (like Stripe, or Authorize.net) so we can accept payments.
Introduction to eCommerce

❏ **8. Products are created and linked to Courses.** (Optional) We have thought about whether we want to make courses available for purchase via the Course Catalog, and if so (even if we are looking to provide them for free), have created the Products for those and have linked them to the correct courses.
Using Products to Offer Course Enrollment

❏ **9. Automated emails are configured.** The automated email settings have been configured, changing the general email settings, and enabling, disabling, and modifying the templates for the automated email triggers that we want to use.
Introduction to Automated Emails

❏ **10. Needed Integrations have been configured.** (Optional) We have considered the different Integrations that we need (for example, if we are looking to use Zoom for our Webinars, or send data to a 3rd party application via Webhook) and have configured them accordingly.
Integration Zoom Meetings for Live Webinars, Webhooks for Custom Integrations, Integration with GoToWebinar & GoToTraining, and more.

❏ **11. Group Admin permissions have been configured.** (Optional) We have thought about whether we want or need to use the Groups feature in the platform to provide courses in bulk to organizations, as well as how we want to provide the courses seats to those organizations/groups, and have configured the Group Admin permissions that determine what privileges that representatives of the Group have when it comes to managing their Students.
Introduction to Groups (Group Permissions article is still in the works).