Onboarding Guide

Getting Started with Absorb!

Welcome to Absorb! We are thrilled you have chosen Absorb as your LMS provider and are eager to assist you in getting your system set up!

This guide provides a general overview of the people you'll be working with, the 6 stages of the Onboarding process as well as the support available to you throughout.

Contents

Preparation

Preparation is key! The first step to getting started with Absorb is to review the below information and prepare for your Kick Off call with your dedicated Onboarding Specialist.

Help Desk Account

The first step you will want to complete is to create a Help Desk Account. This site is a resource for announcements about our software, articles and videos, discussion boards and access to our Client Advocates when you need assistance.

Start your Learning!

Absorb Academy training is broken into 5 different curricula based on the 5 default roles: System Admin, Admin, Instructor, Reporter and BI Reporter. This is great resource to leverage to better understand the LMS capabilities. Get started right away!

Resource Planning Guide

For information on who you might want to add to your project team; take a look at our Resource Planning Guide.

Prep Tasks

- [ ] Create Help Desk Account
- [ ] Use Absorb Academy to start your training right away!
- [ ] Review Resource Planning Guide

Your Absorb Team

We'll be working with you every step of the way!

Onboarding Specialist

- Your main point of contact during the Onboarding Phase. Your Onboarding Specialist is responsible for ensuring a successful implementation of Absorb and providing one on one training during the set-up process.

Account Manager

- Main point of contact for anything account or contract related. Your Account Manager is responsible for managing any new features or changes you would like to make to your Subscription.

Implementation Specialist

- If you have taken advantage of one of our Featured Add On Services, an Implementation Specialist will work directly alongside you to gather requirements and execute the integration.

Client Advocacy Team

- Your primary point of contact for support after launching. Absorb Support can be reached by opening a ticket in the top right corner of this support site or by emailing support@absorblms.com. Your Onboarding Specialist will transition you to Absorb Support as part of your launch.

Billing Team

- Reach out to the Billing team for any invoice or billing related questions. They can be reached by emailing billing@absorblms.com.

Project Phases

Now that you know who you will be working with, let's review the 6 stages of the Onboarding process.

Your Onboarding Specialist will be in touch to schedule a kick off call to officially begin your implementation. The purpose of this call is to meet the project team members, establish scope, and identify deliverables & timelines. Key stakeholders should be included on this call, but technical team members like developers are usually not needed. Separate technical calls will be scheduled to discuss integrations if applicable.

Kick Off Call

We'll start with a non-technical call to gather some high-level requirements. Please feel free to invite anyone that will have a daily role during implementation or afterwards. The Scoping Call generally takes less than an hour. Please note that additional technical calls will be scheduled after the initial kick off to discuss integration details (if applicable).

1. Introductions
2. Overview of your in-scope requirements:
    a. Courses
    b. Learner Demographics
    c. Learner Experience
    d. Admins & Departments
    e. Web Domain
    f. Integrations
    g. Reporting
3. Branding & Portal Creation
4. Certificate Branding Instructions
5. Administrator Training
6. Communication & Support
7. Timeline & Go Live
8. Next steps

Project Management

Your Onboarding Specialist will send weekly project updates. If there are certain people you would like included on these or other types of communications please let your Onboarding Specialist know.

Weekly Project Updates

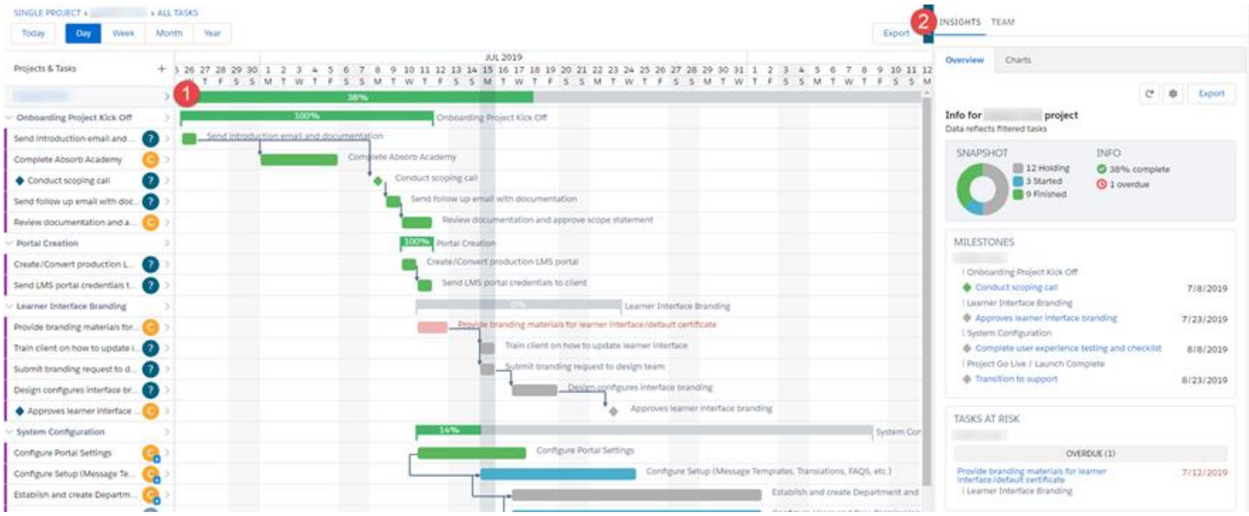
As part of your Onboarding Project, you will receive a link to a Project Planner, or Gantt chart. Every week your Onboarding Specialist will send out weekly updates with items that have been completed as well as next steps for the following week. As you complete tasks, inform your Onboarding Specialist.

Gantt View

You will notice some items are assigned to myself, and others to "C" or Client. That represents who is responsible to complete that task.

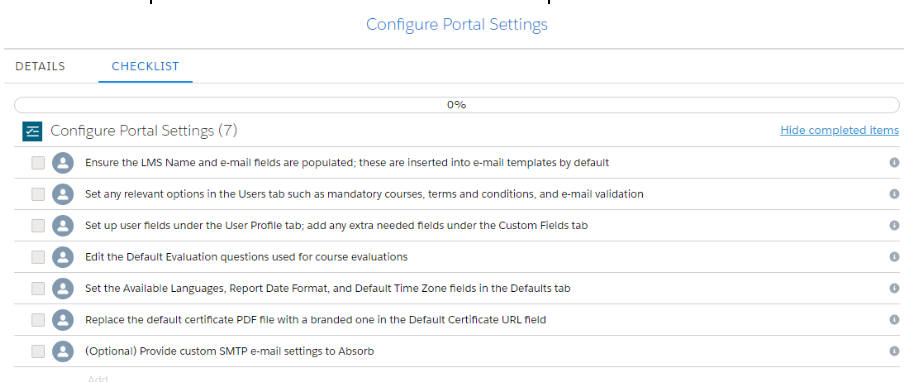
Insights View

Insights (available from the right hand menu) will provide you with a snapshot of task completed and at risk (or overdue).



Checklist

Each task has a list of items to be completed for that task. Review and complete each item.



Planning

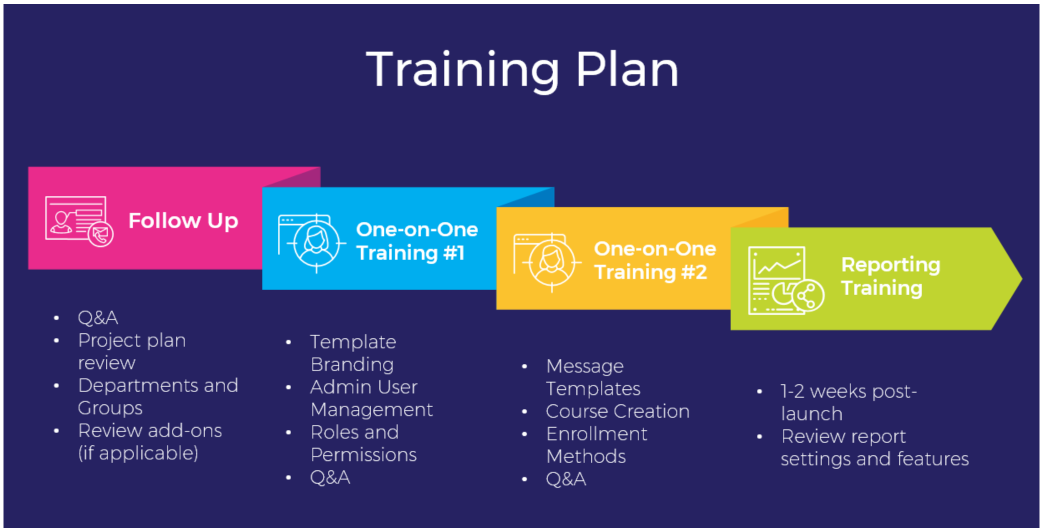
An integral part of doing anything is knowing how! The planning phase of your Onboarding project will consist of training to better understand the many features and functionality of the system, how you can customize and apply specific branding to provide a unique look and feel for your learners, and finally determining the workflows within it to complete your desired outcomes.

Training

All system Administrators have access to our in-depth administrator training available through their portal via the Help and Support menu:

- Absorb Knowledge Base - Access to over 450 Articles in addition to Product Release notes: Best practices recommendations-based feature usage Information regarding product releases whether scheduled and or unscheduled for maintenance. Frequently asked questions client admins ask. Ability to submit a support ticket, track support tickets
- Absorb Assistant - Search for and pull up self help articles for easy reference. The Absorb Assistant is embedded into the right corner of the LMS, getting you immediate answers to your questions during your workflow. Walk Thru Guides provide hands on training and step by step guidance for 38 different topics in 3 different categories.
- Absorb Academy - Absorb Academy training is broken into 5 different curricula based on the 5 default roles: System Admin, Admin, Instructor, Reporter and BI Reporter. This is great resource to leverage to better understand the LMS capabilities,
- One-on-One Training can be scheduled with your Onboarding Specialist after you've completed the courses in Absorb Academy and had a chance to play with the system. We'll take this time to answer any outstanding questions you may have including any workflows or features that are specific to your organization.

Training Plan



Configuration Review

This is an integral part of setting up the LMS and how your LMS is organized and administrated as well as how your learners' access and use it.

Branding

Portal Branding

Absorb LMS offers powerful branding tools (Templates and Themes) for System Admins so that they can apply their organization's colors and images to the Learner user interface. Changes to your style are immediate and can be updated at any time, by any System Admin. As part of our Onboarding process, you have access to our Design team to create an initial template and theme for your portal. Pass along your Client Portal Specifications to your Onboarding Specialist to get started.

Certificate Branding

Absorb LMS offers the ability to issue certifications of completion to your learners upon completion of a course or curriculum. A default certificate for the entire LMS can be set, as well as course or curriculum specific certificates. Certificate Templates in PDF format can be customized to match your branding.

User Management

Department and Groups determine how your LMS is organized and administrated. User Management is an integral part of the LMS and it is essential that these steps be considered early in the Onboarding Process. The two methods of User Management we will be showcasing here are Departments and Groups.

Departments	Groups
•Departments are used to manage users, deploy training activities and gather information. If you have different reporting needs for different sets of users, you may want to set them up into Departments to utilize the Absorb Department-based reporting. •Departments are arranged in a hierarchical parent-child relationship. Most reports, settings and rules in Absorb can reference a specific Department, or a Department along with its sub-departments.	•In the Groups report there are no child or parent associations. The report displays an overview of the number of Users in each, how the Users are added, as well as created and edited dates. Unlike Departments, Groups are primarily used for performing bulk actions on otherwise unrelated Users.

Resources

- The Department and Groups webinar provides a live walkthrough of understanding and setting up your department structure.
- You try! The Department and Group Worksheet help you determine your own department structure.
- Here are a few additional articles to help you get started:
  - Admin Roles & Permissions- Tips for managing admin user access.
  - Admin User Management- Tips for restricting admin access to only certain subsets of users.

Course Management

Determining how your courses should be organized and structured will simplify the import and update of your courses later. Courses can be organized into Categories for ease of administration as well as to increase searchability. You will also want to determine if your content should be organized in a Course, Curriculum or Bundle.

We offer integrations with 3rd party course libraries to allow quick & easy delivery of world-class course content.

Resources

- The Effective Use of Enrollments Webinar provides a walkthrough of all enrollment options and best practices.
- Here are a few additional articles to help you get started:
  - Third Party Course Authoring Guide - Tips for publishing 3rd party courses from Storyline and Captivate, as well as suggestions for exporting video.
  - Availability Rules - Tips for setting up availability rules - applies to many things in the portal including course Self-Enrollment rules.

Execution

Now it's time to put all your knowledge into practice! Let's build your house and most importantly your support structures such as importing your users, loading your course content and determining the communication within your LMS

Import Users

If you're starting out with a blank slate, you can easily import users with a CSV file from the Users Report. The User Import option will walk you through the steps of adding users to your portal. A Sample Template is also available for you to complete. When importing in bulk, it's important to know that any automatic Message Templates that you have enabled - such as New User or Course Enrollment - will be triggered upon adding users into your portal.

Alternatively, we offer many other options for importing users, these can be found through the Data Import Guide or via RESTful API.

Load Course Content

The Courses report is where you can create Online Courses, Instructor Led Courses (ILCs), and Curricula as well as import any third-party content you may have. You can also Import Courses that are created via a Third Party Course Authoring software.

Engagement Guide

Now that you've got some great content into your LMS, how do you fully leverage the features in Absorb to maximize learner engagement, course completions and return logins? We have put together an Engagement Guide with some best practices that will increase learner motivation and decrease frustration.

Validation

Validation is key! The validation phase is testing the LMS to ensure when your learners enter the system your workflows are complete and their experience is as seamless as possible.

Set yourself up as a learner, test out the system, complete courses and assessments (you know all the answers!) Make sure you take the time to create different test users, assign them courses, and make sure your workflows are working the way you expect.

User Acceptance Testing

Completing User Experience Testing is an integral step in ensuring that the content you have added will function as you expect it to for your Learners. We have provided some User Acceptance Testing Guidelines on our Help Desk.

Refine Configurations

Take this time to refine your configurations based on your user experience testing.

Approval

Your Onboarding Specialist will schedule a call about two weeks prior to your launch date to review the Onboarding Checklist and ensure all tasks within the Onboarding process have been completed and that you feel confident to launch your system to your learners. Any items that require additional training or information will be reviewed prior to your Go Live date.

Launch Tasks

- [ ] Review Onboarding Checklist with your Onboarding Specialist
- [ ] Trigger New User Message
- [ ] Celebrate!

Go Live

Congratulations!! Now it's time to put all your hard work into action! Your Onboarding Specialist will work with you to make sure your launch is successful and can be readily available to assist with any minor adjustments as your learners begin to access the system

Post Go Live

Now that your LMS is live you will have access to our Client Advocacy team for any technical or program-related questions but don't worry, we're not going anywhere! We understand that support and assistance during this time is crucial, so your Onbording specialist will continue to monitor and assist with any questions 60 days post launch.

Support Transition

Your dedicated Onboarding Specialist will be available to assist you for the first 60 days. After that you will be transferred to our dedicated Client Services team for further support. Our Client Advocacy team is available when you need them, 24/7 globally, and offers immediate assistance to your technical and program related questions.

Need additional support post launch? Our clients still have the option of taking advantage of our Client Success Manager service, this service provides a dedicated CSM who will work with you post launch a dedicated resource to provide proactive and additional support for your program, such as training, Q&A and best practices on Absorb functionality, defining program KPI's, providing best practices to ensure your LMS is working for you and your learners!

Documentation Pack

Throughout this document we have shared some key Help Desk articles to assist with your set up process. We have linked to them below for quick access:

- Help Desk Account
- Absorb Academy
- Absorb Assistant
- Absorb Academy
- Resource Planning Guide
- Templates and Themes
- Certificate Templates
- Department and Groups (Webinar)
- Online Courses
- Instructor Led Courses (ILCs)
- Curricula
- Import Courses
- Effective Use of Enrollments (Webinar)
- Third Party Course Authoring Guide
- Engagement Guide
- User Acceptance Testing Guidelines
- Availability Rules
- User Import
- Sample Template
- Data Import Guide
- RESTful API

Additional Resources

Want to get the most out of your LMS? Here are some additional resources for you to check out.

- Absorb COVID – 19 Information and Resources (Complimentary)
- Keep your Staff Compliance While Working from Home (Blog)
- Use Absorb LMS to Help Employees Adapt to Working From Home (Blog)
- Back to Basics: What is an LMS? (Blog)
- Reporting 101 (Webinar)
- Custom SMTP (Help Desk Article)
- eCommerce Introduction (Help Desk Article)
- Zoom Integration (Help Desk Article)