

## ROLE: Publisher Administrator

### New Features:

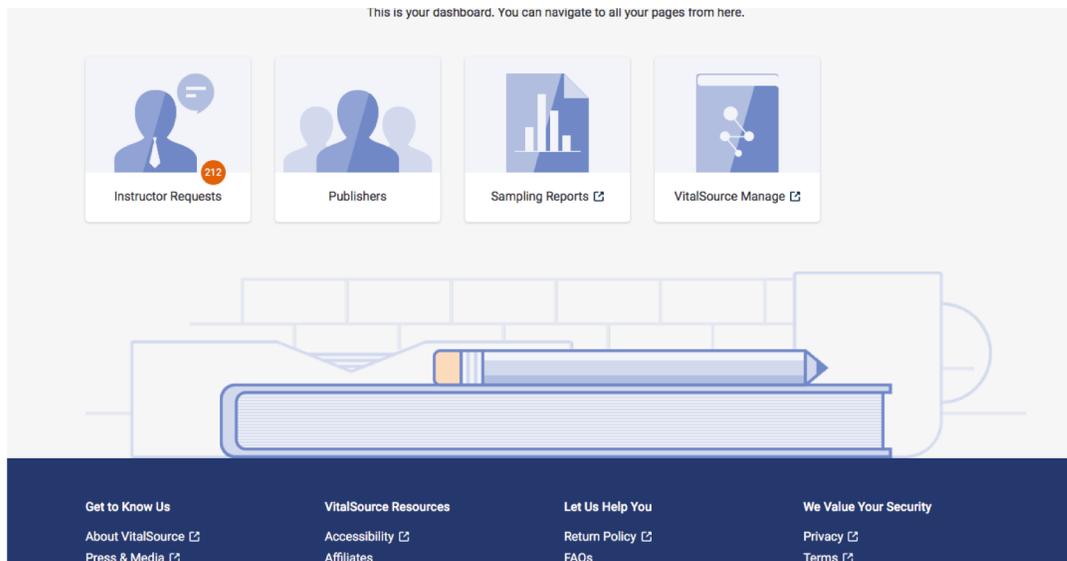
- *New Sampling Dashboard/Menu*
- *New Instructor Request Review Page*
- *Ability to Bulk Approve/Deny Instructor Requests*
- *New Publishers Menu (Manage Reps)*

### New Sampling Dashboard/Menu

**Before:** When the Publisher Administrator user logs in to the Sampling Portal, the user lands on the “Instructor Request” page. The Publisher Administrator can then switch to other views by clicking on the notebook icon in the upper right-hand section of the page. This login view has been replaced with a new Publisher Administrator dashboard.

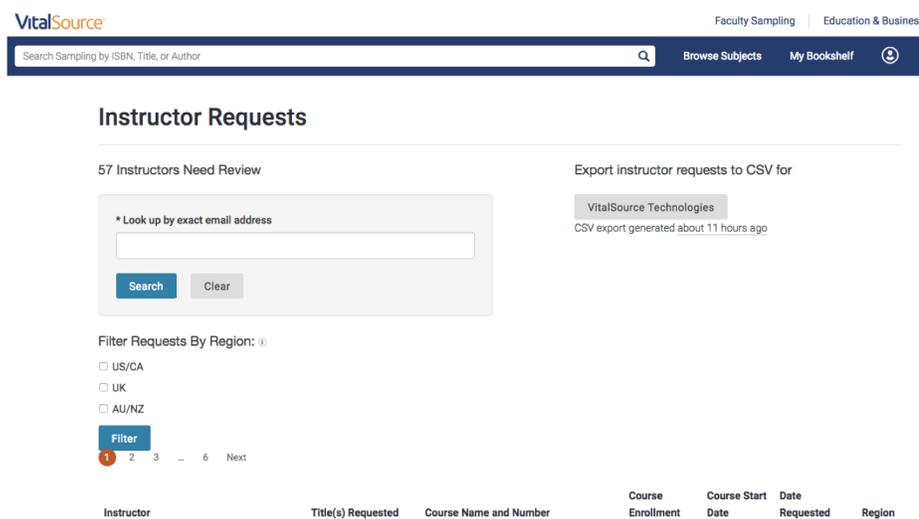
The screenshot displays the 'Instructor Requests' page in the VitalSource Sampling Portal. At the top, there is a search bar with the text 'Search Sampling by ISBN, Title, or Author' and a search icon. To the right of the search bar are links for 'Browse Subjects' and 'My Bookshelf'. Below the search bar, the page title is 'Instructor Requests'. There are two main sections: '57 Instructors Need Review' and 'Export instructor requests to CSV for VitalSource Technologies'. The 'Export' section shows a 'CSV export generated about 11 hours ago'. Below these sections is a 'Filter Requests By Region' section with radio buttons for 'US/CA', 'UK', and 'AU/NZ', and a 'Filter' button. A pagination bar shows '1 2 3 ... 6 Next'. Below the filter section is a table with columns: 'Instructor', 'Title(s) Requested', 'Course Name and Number', 'Course Enrollment', 'Course Start Date', 'Date Requested', and 'Region'. At the bottom, there is a 'My Bookshelf' menu with icons for a user profile, a globe, and a document. The menu items are: 'Instructor Requests', 'Sampling Reports', 'Import Status', 'VitalSource Manage', and 'Administration'.

**After:** The new landing page for a Publisher Administrator shows the different administration options that are available. As we continue to upgrade the sampling experience, this page will start to show information that will be helpful for the Publisher Administrator user (for example: release notes, new VitalSource Bookshelf® feature updates, etc.).



## New Instructor Request Review Page

**Before:** The Publisher Administrators could not bulk approve/deny instructor requests. When the Publisher Administrator reviewed the open instructor requests, they had to evaluate and approve or deny each user by clicking through to that user’s information and then clicking the approve or deny button. This functionality will still be available; however, we have added functionality to make it easier to approve and deny instructor requests on the main Instructor Requests page.



## New Instructor Page (cont'd)

The screenshot shows the 'Instructor Details' page. At the top, there is a search bar and navigation links for 'Browse Subjects', 'My Bookshelf', and user icons. The main content area is titled 'Instructor Details' and contains the following information:

- CDA CDA**
- cdeangelis@gmail.com**
- Institution:** Not Available
- Department:** Other
- Institution Type:** Unknown or Unclassified

On the right side, there are two buttons: a green 'Verify' button and a grey 'Deny' button. Below this, the 'Requested Samples' section shows a book cover for 'Bookshelf Tutorial' by VSM, published by VitalSource Technologies. A note states: 'This request is for MANAGEMENT CONTROL with 40 students enrolled. The course begins on 2017-10-09'. At the bottom, there is a link: 'Return to unverified instructors list'.

**After:** The Publisher Administrator will be able to bulk approve or deny instructor requests on the main Instructor Requests landing page. By checking the box on the left-hand side, they can check all or a portion of the users up for review and then click “Approve” or “Deny” without having to click through to each user’s info.

The ability to sort and filter by region or download the list of instructors who have made requests will continue to be available, as well as the ability to click through to a user’s request to view more information about the user and their request before approving or denying the user.

The screenshot shows the 'Instructor Requests' page. At the top, there is a search bar and navigation links for 'Faculty Sampling', 'Education & Business Solutions', and user icons. The main content area is titled 'Instructor Requests' and contains a search bar and a table of requests. The table has the following columns: 'Instructor Information', 'Course Information', 'Titles Requested', 'Date Requested', and 'Region'. There are five rows of data, each with a checkbox on the left for selection. Below the table, there is a footer section with links for 'Get to Know Us', 'VitalSource Resources', 'Let Us Help You', and 'We Value Your Security'.

Instructor Information	Course Information	Titles Requested	Date Requested	Region
<input type="checkbox"/> Instructor Name Email: Instructor Email Institution: Institution Department: Pima Community College - West Institution Type: Type	BIO 102 Students: 52 Start Date: Oct 24, 2017	324254655477 324254655477 324254655477	Oct 24, 2017 14:24:11 UTC	🇺🇸
<input type="checkbox"/> Instructor Name Email: Instructor Email Institution: Institution Department: Pima Community College - West Institution Type: Type	BIO 102 Students: 52 Start Date: Oct 24, 2017	324254655477 324254655477 324254655477	Oct 24, 2017 14:24:11 UTC	🌐
<input type="checkbox"/> Instructor Name Email: Instructor Email Institution: Institution Department: Pima Community College - West Institution Type: Type	BIO 102 Students: 52 Start Date: Oct 24, 2017	324254655477 324254655477 324254655477	Oct 24, 2017 14:24:11 UTC	🇺🇸
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<input type="checkbox"/> Instructor Name Email: Instructor Email Institution: Institution Department: Pima Community College - West Institution Type: Type	BIO 102 Students: 52 Start Date: Oct 24, 2017	324254655477 324254655477 324254655477	Oct 24, 2017 14:24:11 UTC	🇺🇸

VitalSource Faculty Sampling Education & Business Solutions

Search store by ISBN, title, or author

Browse by My Bookshelf Sampling Dashboard

### Instructor Requests

Search instructors by name or email

Displaying 5 results CSV

Instructor Information	Course Information	Titles Requested	Date Requested	Region
<input type="checkbox"/> Instructor Name Email: Instructor Email Institution: Institution Department: Pima Community College - West Institution Type: Type	BIO 102 Students: 52 Start Date: Oct 24, 2017	324254655477 324254655477 324254655477	Oct 24, 2017 14:24:11 UTC	
<input type="checkbox"/> Instructor Name Email: Instructor Email Institution: Institution Department: Pima Community College - West Institution Type: Type	BIO 102 Students: 52 Start Date: Oct 24, 2017	324254655477 324254655477 324254655477	Oct 24, 2017 14:24:11 UTC	
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[support@ingramcontentgroup.com](mailto:support@ingramcontentgroup.com)  
[\(800\) 555 - 5555](tel:(800)555-5555)

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Search Sampling by ISBN, Title, or Author

Browse Subjects My Bookshelf

### Instructor Details

**Kelly Greene**  
 Kelly.Greene@ingramdigital.com  
**Institution:**  
**Department:** Other

Verify

Deny

### Requested Samples



Title: TEST ASSET Thinking about Therapy?: What to Expect from "The Talking Cure".  
 ISBN-10: 0595213138  
 Author(s): Elaine Luddy Klonicki  
 Publisher: VitalSource Technologies  
 Copyright year: 2010  
 Edition:

This request is for PSY101 with 50 students enrolled. The course begins on 2018-09-12

[Return to unverified instructors list](#)

## New Publisher's Menu

**Before:** A Publisher Administrator had the ability to manage a number of functions in the Sampling Portal like Campaigns, Reps, Notifications, and Recommendations. On their main Publisher page, the Publisher Administrator could view the various companies they are associated with and can then manage the various aspects as needed. The user experience currently requires a lot of clicks to get to the functionality that the Publisher Administrator would like to manage.

### Manage Campaigns

VitalSource Technologies  
 Connect ID: 2  
 API Key: ETHYA\*\*\*  
 Legacy ID: VST

Manage Campaigns
Manage Admins
Manage Reps
Manage Notifications

Send Recommendations

### Manage Publisher Reps

VitalSource
Faculty Sampling | Education & Business Solution

Browse Subjects | My Bookshelf | Redeem | Sampling Dashboard

## VitalSource Technologies Reps

+ Grant Access
+ Grant In Bulk

### Manage Notifications

VitalSource
Faculty Sampling | Education & Business Solution

Browse Subjects | My Bookshelf | Redeem | Sampling Dashboard

Publishers / VitalSource Technologies / Manage Publisher Notifications

+ Add Email Notification

### Send Recommendations

VitalSource
Faculty Sampling | Education & Business

Browse Subjects | My Bookshelf | Redeem | Sampling Dashboard

Publishers / VitalSource Technologies / Send Recommendations

## Send Recommendations to Instructors in Bulk

Import a CSV file in the following format to send recommendations in bulk to instructors for VitalSource Technologies. You can export files in CSV format from various applications, such as Microsoft Excel or Google Sheets.

Download CSV Template

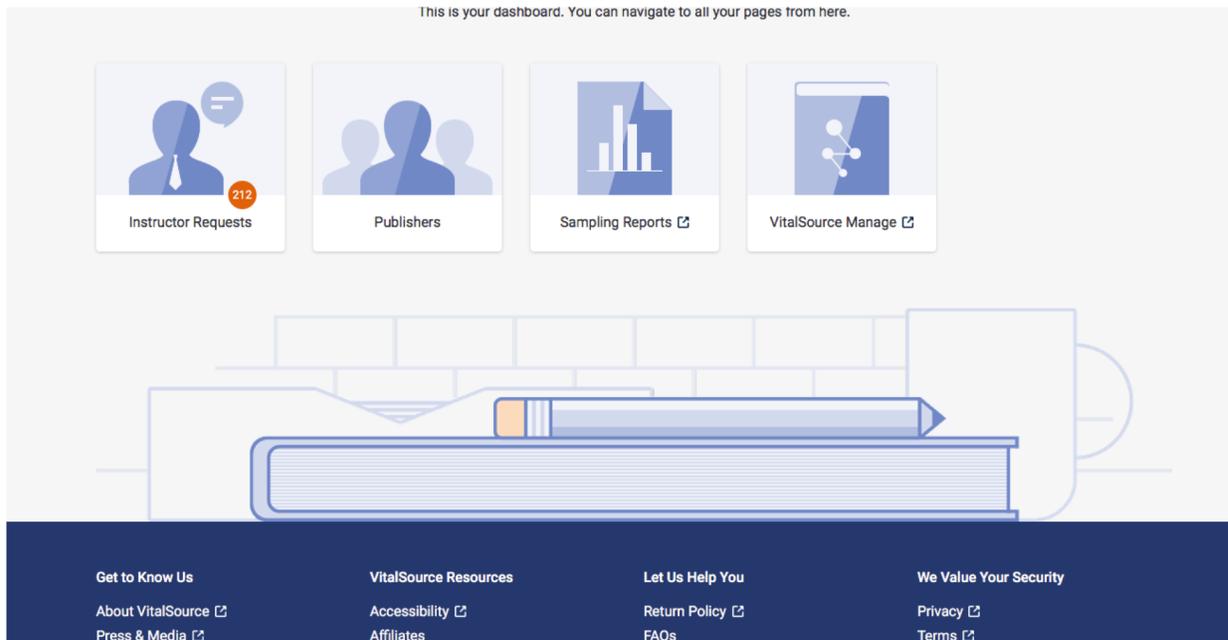
sales\_rep\_email,product\_id,email,first\_name,last\_name,country,school\_name,school\_id,institution\_id  
 sales.rep@vitalsource.com,9781234567890,anders.andersen@example.com,Anders,Andersen,US,The Ohio State University,,  
 sales.rep@vitalsource.com,1234567890,michelle.smith@example.com,Michelle,Smith,US,,1234

Campaign Code  
 vitalsource\_default

**After:** The Publisher Administrator will have a Publishers page link on their main dashboard. When they select the Publishers page, they will be able to view all of the companies they are associated with as a Publisher Administrator. The company setup shown in this area is based on the way that companies are set up in our Manage product. As part of the company info changes, the Publisher Administrator will be able to search across companies for the user, campaign code, etc. to ensure they click through to the correct company to manage events or persons.

Publisher Administrators will now be able to create other Publisher Administrators for the companies they are associated with and will not have to rely on a VitalSource administrator to add the Publisher Administrator user for them. In addition, they will continue to manage Publisher Reps, Campaigns, Recommendations, etc. in bulk or individually.

## Dashboard: Publisher Menu Option



## Manage Administrators: Grant Access

VitalSource Faculty Sampling | Education & Business Solution

Search Store by ISBN, Title, or Author

Browse Subjects My Bookshelf Redeem Sampling Dashboard

### VitalSource Technologies Admins

Search by First Name or Last Name or Email Address

First Name	Last Name	Email Address

## Manage Representatives: Grant Access (individually)

VitalSource Faculty Sampling | Education & Business Solution

Search Store by ISBN, Title, or Author

Browse Subjects My Bookshelf Redeem Sampling Dashboard

### VitalSource Technologies Reps

Search by First Name or Last Name or Email Address

## Manage Representatives: Grant Access (bulk)

VitalSource Faculty Sampling | Education & Business Solutions

Search store by ISBN, title, or author

Search reps by name or email

Rep Name

	active
	active
	active
	active

Format: All Files

Options Cancel Open

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Education & Business Solutions

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## ROLE: Publisher Rep

### New Features:

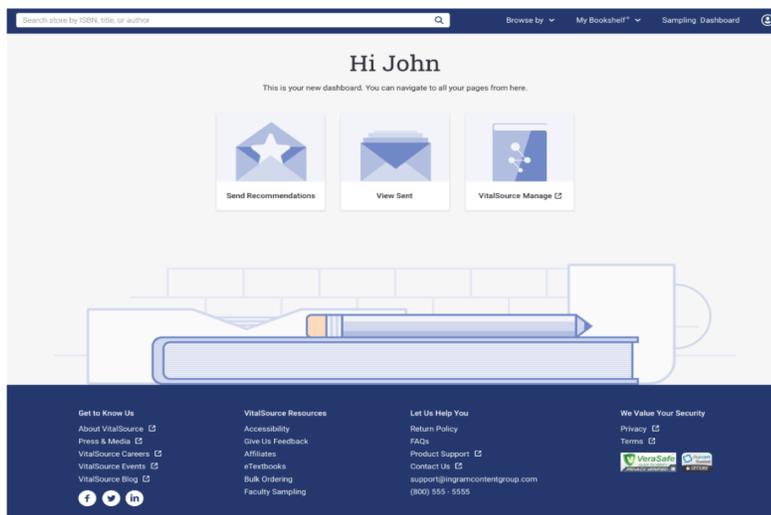
- *New Sampling Dashboard/Menu*
- *Ability to Send Bulk Recommendations*

### New Publisher Rep Dashboard/Menu

**Before:** Previously, Publisher Reps didn't have a dashboard to send recommendations or review sent recommendations. When logging in, the rep would be presented with a sampling landing page dedicated to the Publisher Rep role.



**After:** When the Publisher Rep logs in now, they have their own dashboard where they are able to send recommendations and view recommendations that were sent.



## Sending Bulk Recommendations

**Before:** A Publisher Rep was not able to send bulk recommendations prior to this new functionality—they had to ask their Publisher Administrator to send bulk recommendations for them as needed.

**After:** Publisher Reps can now send recommendations using a bulk template.

The screenshot shows the VitalSource web interface. At the top, there is a navigation bar with the VitalSource logo on the left and links for 'Faculty Sampling' and 'Education & Business' on the right. Below the navigation bar is a search bar with the placeholder text 'Search Store by ISBN, Title, or Author' and a magnifying glass icon. To the right of the search bar are links for 'Browse Subjects', 'My Bookshelf', 'Redeem', and 'Sampling Dashboard', along with a user profile icon.

Below the navigation bar is a breadcrumb trail: 'Publishers / VitalSource Technologies / Send Recommendations'. The main heading is 'Send Recommendations to Instructors in Bulk'. Below the heading is a paragraph of text: 'Import a CSV file in the following format to send recommendations in bulk to instructors for VitalSource Technologies. You can export files in CSV format from various applications, such as Microsoft Excel or Google Sheets.'

There is a button labeled 'Download CSV Template'. Below this is a code block showing the CSV format:

```
sales_rep_email,product_id,email,first_name,last_name,country,school_name,school_id,institution_id
sales.rep@vitalsource.com,9781234567890,anders.andersen@example.com,Anders,Andersen,US,The Ohio State University,,
sales.rep@vitalsource.com,1234567890,michelle.smith@example.com,Michelle,Smith,US,,,1234
```

Below the code block is a 'Campaign Code' dropdown menu with the selected value 'vitalsource\_default'.