



NEO

by CYPHER LEARNING

Getting started guide for Administrators

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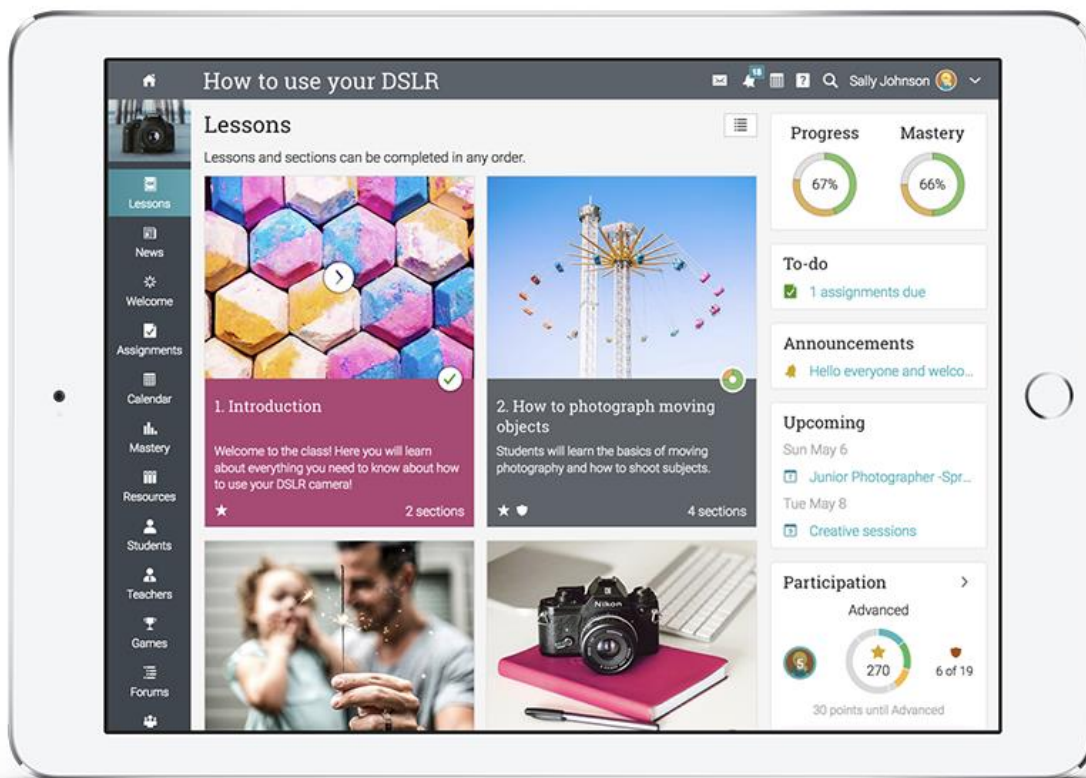
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Introduction

NEO is a world-class, award-winning learning management system (LMS) for schools and universities. The platform is known for delivering a great user experience while incorporating all the essential tools schools need to support effective teaching and learning.

NEO is a product of CYPHER LEARNING, a company that specializes in providing learning platforms for organizations around the world. CYPHER LEARNING provides a similar LMS for use by businesses called MATRIX and an LMS for use by entrepreneurs called INDIE. CYPHER LEARNING products are used by over 20,000 organizations, have millions of users, and have won several awards.



Getting started guide for Administrators

We want you to get the best results when using our site, especially when you are just starting out. That is why we created [three getting started guides](#) for the main types of users on NEO: administrators, teachers and students.



[Getting started guide for Administrators](#) (this guide) explains topics such as: navigating in NEO, configuring features, customizing the platform and managing users.



[Getting started guide for Teachers](#) explains topics such as: creating a class, using competencies and grading assignments.



[Getting started guide for Students](#) explains topics such as: enrolling in classes, submitting assignments and communicating with teachers.

This guide covers the most common steps [administrators](#) go through when they start using NEO. Please consult the table of contents if you want to find a specific topic.

If you have any additional questions or want to explore more of the platform's features, please browse the Help Center or visit our support forum.



Creating the school portal

To create your NEO site, go to the sign up page on our main [website](#), fill in the required information, then click the sign up button. We recommend choosing a short and simple URL, that can be easily remembered by users.

Start using NEO right away

Sign up for the free plan, which includes a 14-day trial of all Enterprise features.

Name	<input type="text" value="University of Arts"/>		
URL	http://	<input type="text" value="artsuniversity"/>	.neolms.com (select URL for your site, letters and digits only)
State	<input type="text" value="California"/>	Country	<input type="text" value="United States"/>
First name	<input type="text" value="James"/>	Last name	<input type="text" value="Stevens"/>
Email	<input type="text" value="jamesstevens@email.cc"/>	Confirm email	<input type="text" value="jamesstevens@email.cc"/>
User ID (3+ chars)	<input type="text" value="james"/>		
Password (5+ chars)	<input type="text" value="....."/>	Confirm password	<input type="text" value="....."/>

Congratulations! You have created your NEO site and now you're ready to start setting it up. We will be covering some basic options in the next sections.

Getting started guide for Administrators

Navigating the platform

The administrator dashboard is the first page you see when you log in to your account. Here you can see an overview of the most important site information. There is also information related to your account such as your calendar, to-do list, notifications, and more.

The screenshot displays the administrator dashboard with the following components:

- Header:** "Dashboard" title, navigation tabs for "Teaching", "Groups", and "Admin", and a "Class catalog" button.
- Left Sidebar:** A vertical menu with icons and labels for "Classes", "Paths", "Groups", "Dashboard" (highlighted), "News", "Welcome", "Users", "Organizations", "Resources", "Reports", "Compliance", and "Admin".
- Main Content Area:** A grid of widgets:
 - Classes:** 13 Active, 4 Archived, 5 Templates
 - Users:** 38 Students, 6 Parents, 16 Teachers, 15 Administrators
 - Groups:** 19 School, 4 Class
 - App center:** 45 Installed, 6 Not installed
 - Resources:** 8546 Files, 70 School
 - Enrollments:** 157 Active, 48 Deactivated, 30 Completed, 488 Awards
 - E-commerce:** \$176 Revenue, 8 Orders, \$22 Average order
 - Organizations:** 3 Organizations
 - Plan:** Free, 400 Max students, 625 days Premium trial
- Right Sidebar:** A vertical stack of utility widgets:
 - Calendar:** May 2018 calendar grid.
 - To-do:** 15 assignments to grade.
 - Site wide game:** Progress indicator showing 2 stars and 0 of 4 points.
 - Notifications:** 1 photos to moderate, 1 user reports.
 - Announcements:** A list of recent site announcements.
 - Today:** "Open Doors Day" event.

Getting started guide for Administrators

Icons and navigation

You will see various icons in the platform that are used for adding, editing, deleting, and other actions.

Here is an overview of the most important icons:



[Add](#) content such as classes, rules or portal pages.



[Remove](#) items from your platform.



[Edit](#) a page or an item.



[Configure](#) different areas of the platform.



[Delete](#) items.



Access your [messages](#) through the messages icon in the top right bar.



[Notifications](#) allow you to keep up with different changes in the system.



The [trash](#) icon opens a pop-up with deleted content such as classes.



Your [shopping cart](#) contains your ordered learning items (if e-commerce is enabled).



This icon provides access to the [NEO Help Center](#).

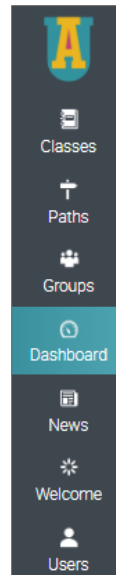


Use the [search](#) icon to find specific content on your site.

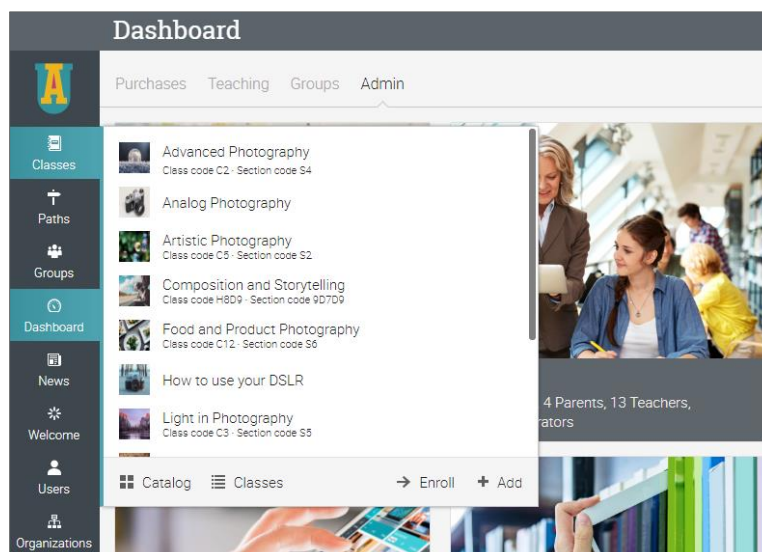
Getting started guide for Administrators

Left bar

The left bar displays tabs that allow you to quickly navigate to the main areas of the site, such as Classes, Groups, Dashboard, News, Welcome, Users, Resources, Reports, Organizations, Compliance and Admin.

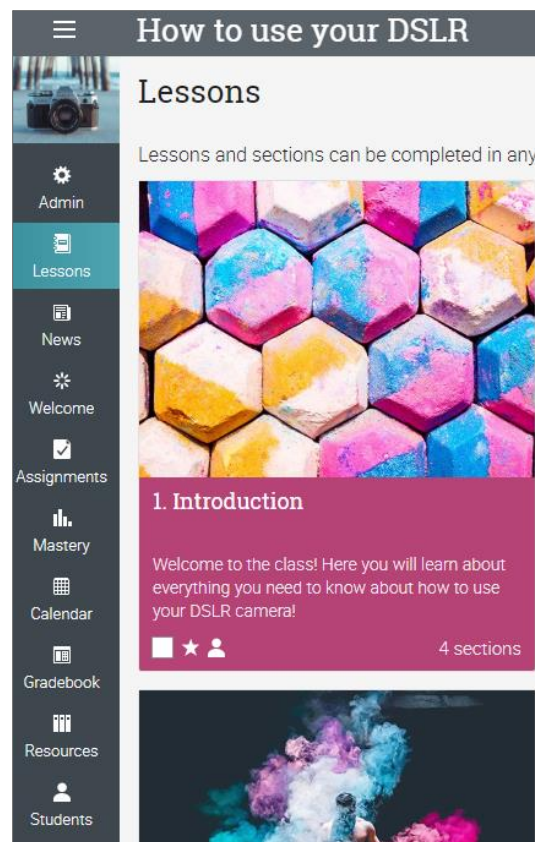


The left bar gives you access to these tabs no matter where you are in the site. If you hover over a tab, a pop-up window will appear with the most important options for that area.



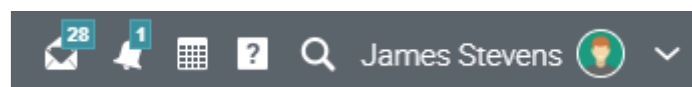
Getting started guide for Administrators

For example, when you visit a class, the main left bar is minimized, allowing you to navigate within any area of the site by simply hovering over the main menu in the top left side of the page. The class left bar shows tabs lead you to class areas such as: news, lessons, calendar, assignments and the gradebook.



Top right bar

The top right bar displays icons with access to your messages, notifications, calendar, trash can, help center, search and profile.



Getting started guide for Administrators

Right bar

In the right bar, you can find your to-do list, announcements, upcoming events, and a list of minimized windows. To see more details, just click on an item.

The screenshot displays the right bar interface with three main sections:

- Calendar:** A monthly calendar for April 2018. The date 18 is highlighted. Below the calendar are links for "full calendar" and "hide".
- To-do:** A section titled "To-do" with a plus sign icon. It shows "30 assignments to grade" with a pencil icon.
- Announcements:** A section titled "Announcements" containing five items, each with a bell icon:
 - "The class starts on Mond..." from Geography
 - "Hi everyone, We're alway..." with subtext "UI update: Calendar tweaks"
 - "Hi everyone, We've almos..." with subtext "Terminology update: Curricul..."
 - "Hi everyone, Here are thi..." with subtext "Latest posts from the NEO Bl..."
 - "Hi everyone, You can no..." with subtext "New canned message: Achie..."

Getting started guide for Administrators

News feed

The news feed aggregates news items from users, classes, groups and school. Product News announcements usually contain updates from the NEO team. By default, a news feed only shows the latest news and you can scroll down the page for more items.

The screenshot displays the 'News' feed interface. On the left is a navigation sidebar with icons for Classes, Paths, Groups, Dashboard, News (highlighted), Welcome, Users, Organizations, Resources, and Reports. The main content area shows a list of posts:

- Zsolt Bertalan > Mastering photography**
If you take this path you will become a better photographer.
Apr 23, 2:03 pm Like Comment Edit Delete Remove sticky
- Zsolt Bertalan > Mastering photography**
Welcome to the Photography learning path!
Apr 23, 2:03 pm Like Comment Edit Delete Remove sticky
- Karen Richards > How to use your DSLR**
Hello everyone and welcome to 'How to use your DSLR'! I am Karen, your new teacher!
Apr 20, 1:55 pm Like Comment Edit Delete Remove sticky
3 people like this.
- Sally Johnson**
Hi!
Apr 20, 11:03 am Like Comment Edit Delete
1 person likes this.
- Zsolt Bertalan > Advanced Photography**
Group meeting begin on Monday.
Apr 12, 12:26 pm Like Comment Edit Delete Remove sticky
- Zsolt Bertalan > How to use your DSLR**
Hello Everyone!
Apr 6, 1:14 pm Like Comment Edit Delete Remove sticky
2 people like this.

On the right side, there are four panels:

- Notifications**: 1 photos to moderate, 1 user reports
- Announcements**: If you take this path you ... Mastering photography, Hello everyone and welco... How to use your DSLR, Group meeting begin on ... Advanced Photography, Hi everyone, Classes, bun... New feature: Purchase sum..., Hi everyone, Here are thi... Latest posts from the NEO BL...
- Today**: Exhibition: Best photos fr... Sport Photography, Feedback evaluation Color Photography
- Upcoming**: (empty)

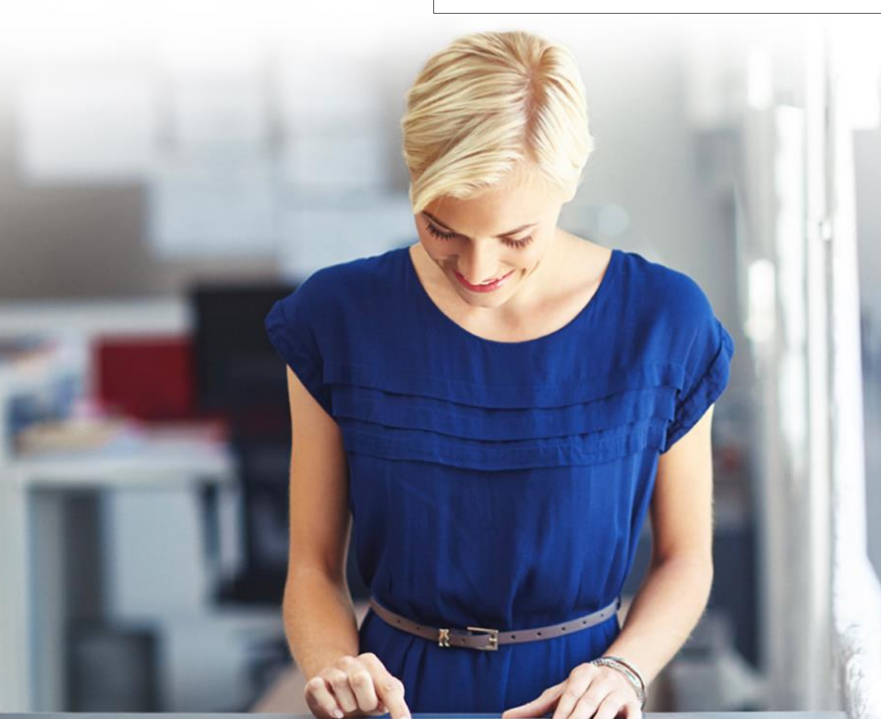
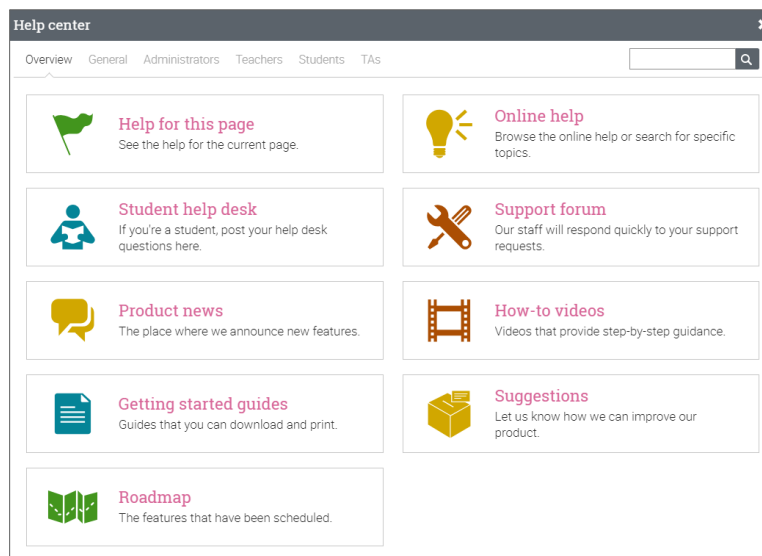


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Help Center

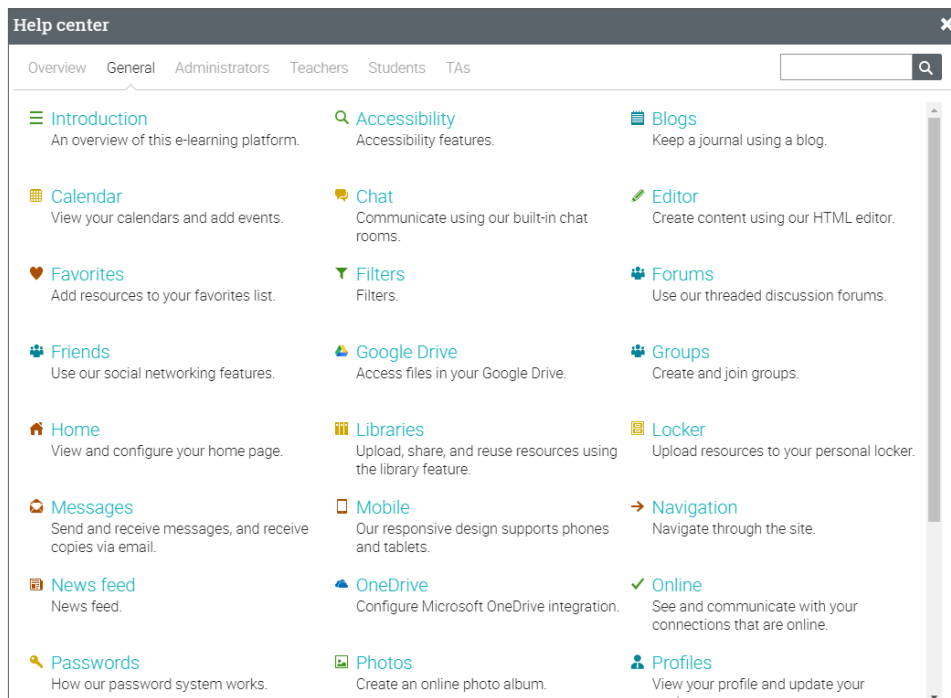
We provide extensive support at every step of our collaboration. To access the Help Center, click the icon in the top right bar.

A pop-up box will open with different options. Use the searchable online help to browse different help topics. If you are on a certain page and need guidance, a help for the current page option will also appear. Here you can also find access to our Support forum and Product news, where we frequently post updates on new features.



Getting started guide for Administrators

Users can find help topics organized by account type in the searchable online help. Most topics have detailed instructions with screenshots. The Help Center is a pop-up so you can browse through the topics without leaving your current page.



Getting started guide for Administrators

Profile

Your profile page shows your basic information, account details, photos, and more. The information that is visible depends on your account type and the portal's security settings.

To start setting up your profile, go to the top right bar and click on the profile button. Then, click on the Edit button in the top right.

The screenshot displays a user profile page for William Taylor. At the top, the name "William Taylor" is shown next to a search icon and a notification bell. Below the name are two tabs: "Info" and "About", with "About" currently selected. In the top right corner of the profile area, there is a red-bordered button with a pencil icon and the text "Edit".

The main content area is divided into three sections:

- About:** "Admission Board administrator."
- Info:** "Basics"
 - Organization: [Admission board](#)
 - Location: CA, United States
- Miscellaneous:** "Logins: 0"

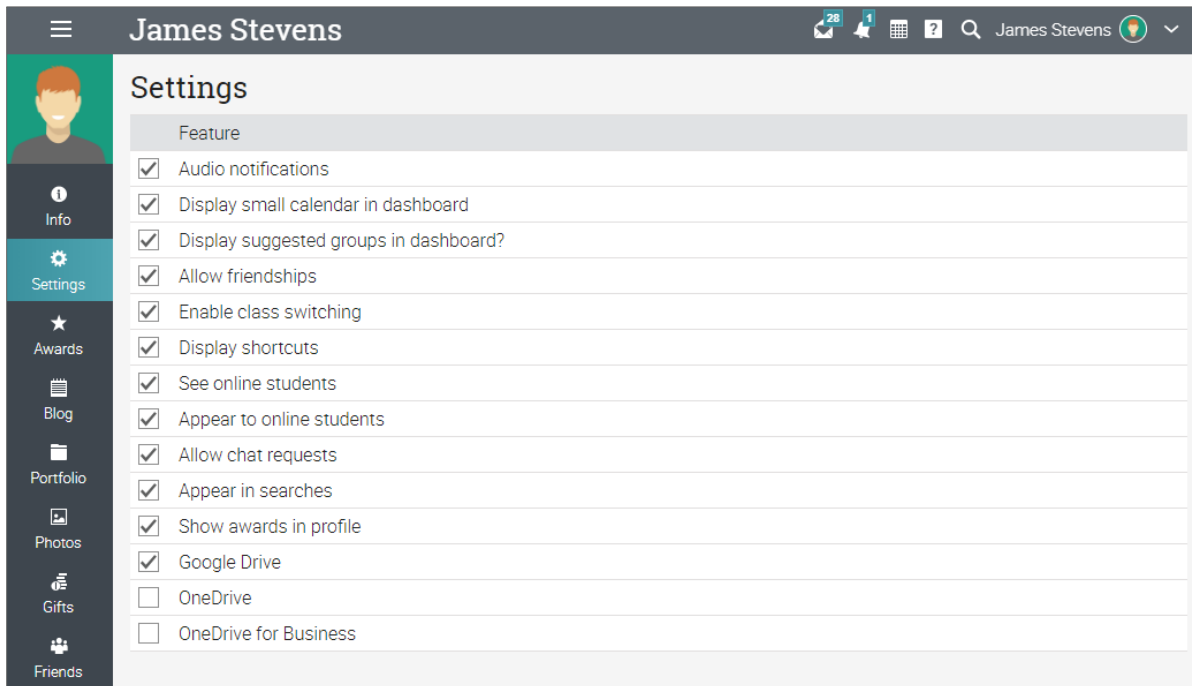
On the right side, there are three summary boxes:

- School:** University of Arts, Schools of arts
- Organization:** Admission board
- Account:**
 - Type: Administrator
 - Joined: Apr 18, 2018
 - Last login: never
 - [Login credentials](#)
 - [Reset password](#)

A dark sidebar on the left contains a menu with icons and labels: Info, Settings, Awards, Blog, Portfolio, Photos, Gifts, Friends, Login history, and Notes.

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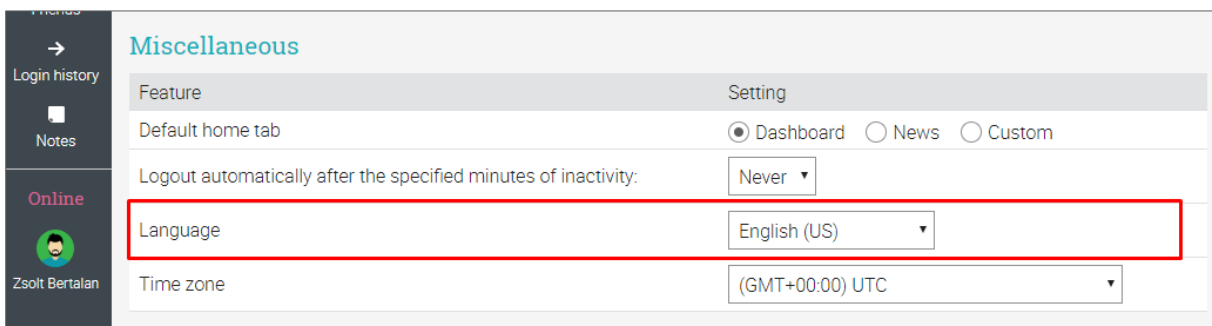
Go to the Settings tab in the left bar to choose different options related to your profile, such as displaying your online status for students or allowing users to request to chat with you.



The screenshot shows the 'Settings' page for James Stevens. The left navigation bar has 'Settings' selected. The main content area is titled 'Settings' and contains a table of features with checkboxes.

Feature	Setting
<input checked="" type="checkbox"/> Audio notifications	
<input checked="" type="checkbox"/> Display small calendar in dashboard	
<input checked="" type="checkbox"/> Display suggested groups in dashboard?	
<input checked="" type="checkbox"/> Allow friendships	
<input checked="" type="checkbox"/> Enable class switching	
<input checked="" type="checkbox"/> Display shortcuts	
<input checked="" type="checkbox"/> See online students	
<input checked="" type="checkbox"/> Appear to online students	
<input checked="" type="checkbox"/> Allow chat requests	
<input checked="" type="checkbox"/> Appear in searches	
<input checked="" type="checkbox"/> Show awards in profile	
<input checked="" type="checkbox"/> Google Drive	
<input type="checkbox"/> OneDrive	
<input type="checkbox"/> OneDrive for Business	

Change your language in the Miscellaneous section:



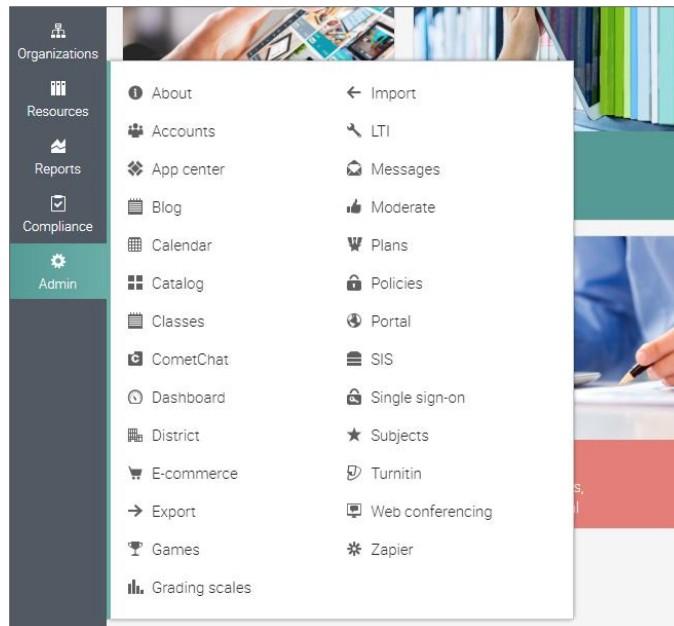
The screenshot shows the 'Miscellaneous' settings page. The 'Language' setting is highlighted with a red box. The 'Language' dropdown menu is set to 'English (US)'.

Feature	Setting
Default home tab	<input checked="" type="radio"/> Dashboard <input type="radio"/> News <input type="radio"/> Custom
Logout automatically after the specified minutes of inactivity:	Never ▼
Language	English (US) ▼
Time zone	(GMT+00:00) UTC ▼

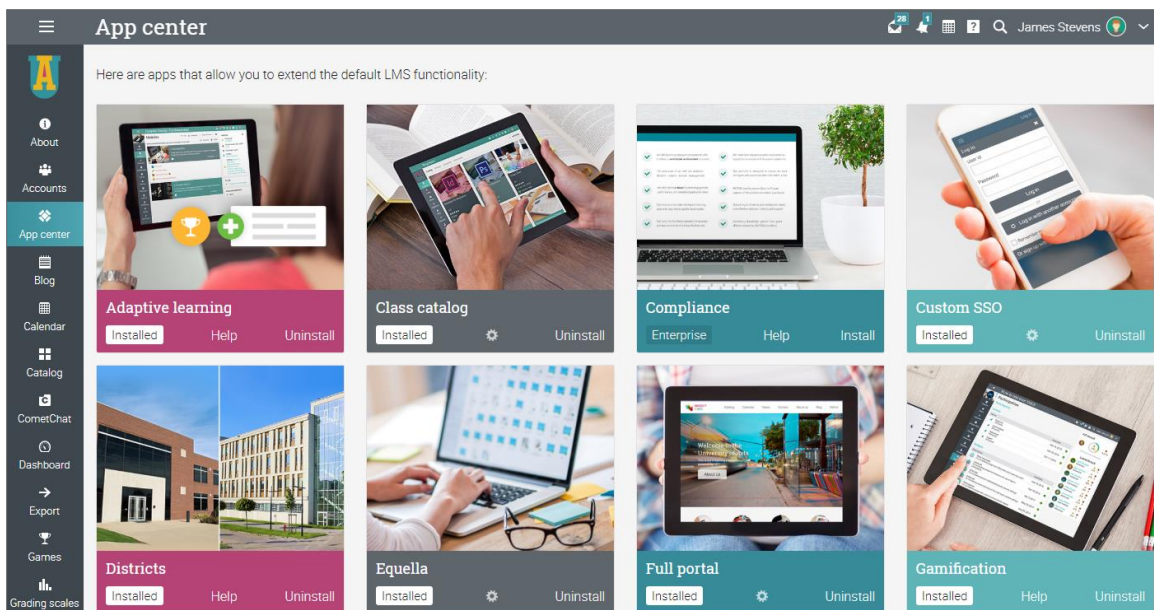
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Configuring features

As an administrator, you are responsible for configuring the site, including enabling or disabling features. It's easy to do so by using the Admin menu in the left bar.

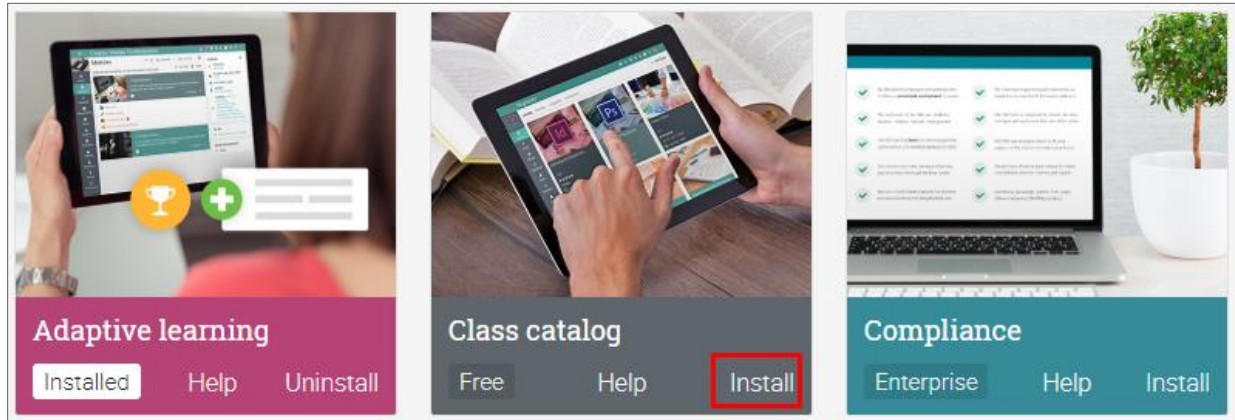


Features can be configured through our App center, which can be found under Admin/App center.

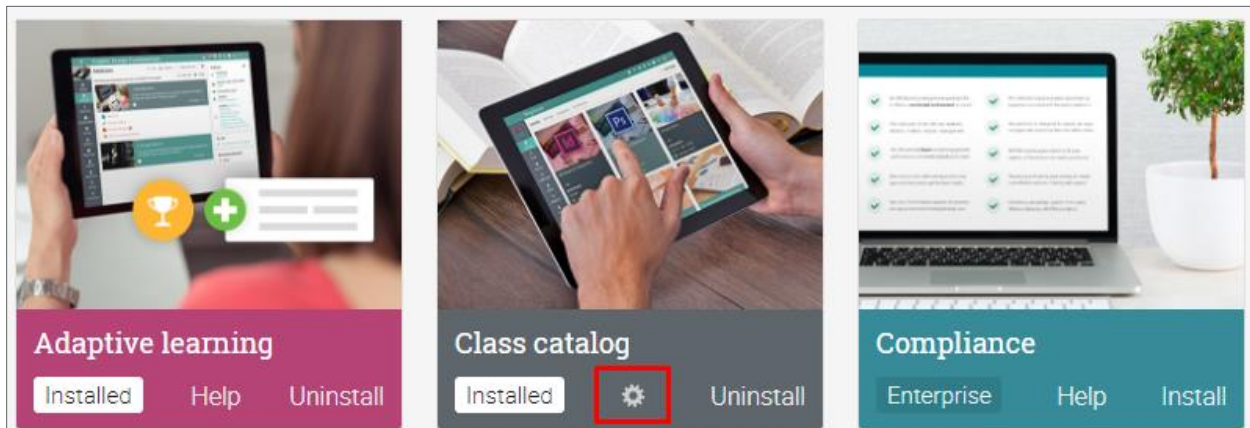


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First, you must install the app:



Then click on the configure button to start setting it up:



Here you can find features such as Gamification, Adaptive learning or Groups. You can also find the available integrations, including Google Drive, OneDrive or Turnitin.

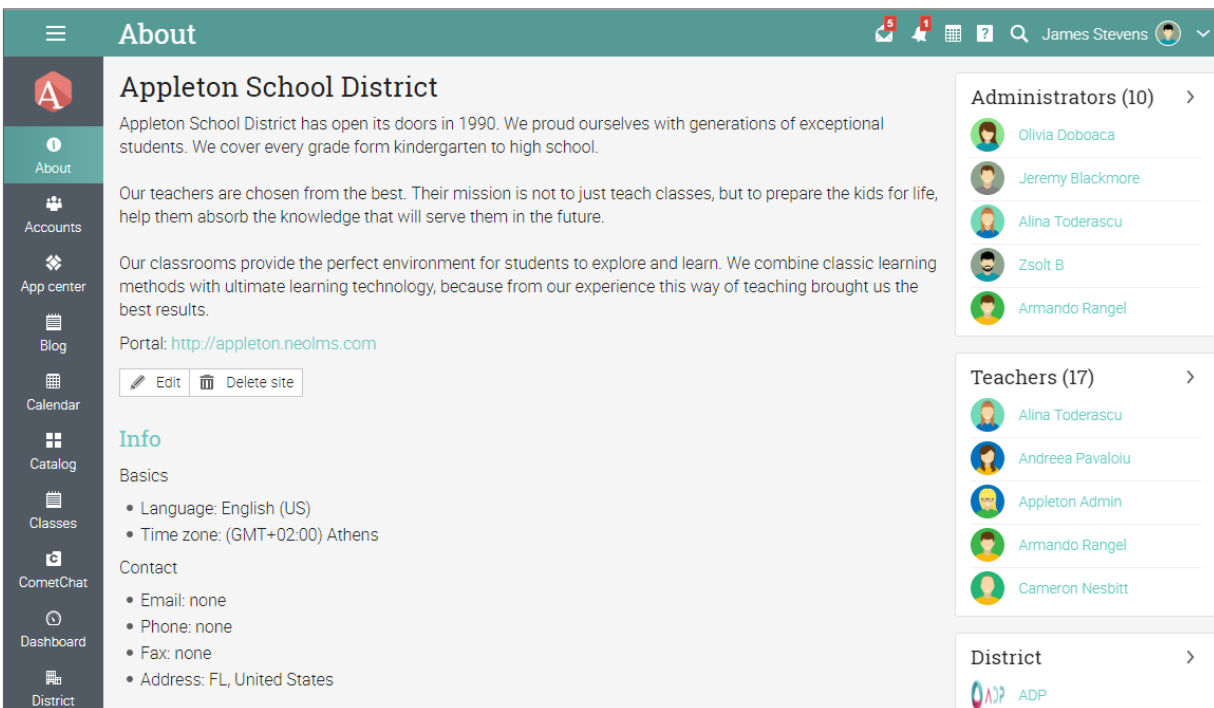
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Customizing the school portal

You can customize many aspects of your school's portal, including the color scheme, adding your organization's logo and changing the terminology. In NEO, it's easy to configure what visitors and users see and you also have more advanced options such as adding Custom CSS.

Portal name, description and details

To set up details about your organization, visit the Admin/About section. Here you can edit your organization's name, add a description and website, add a contact email, select your language, and more. To make changes, click the Edit icon.



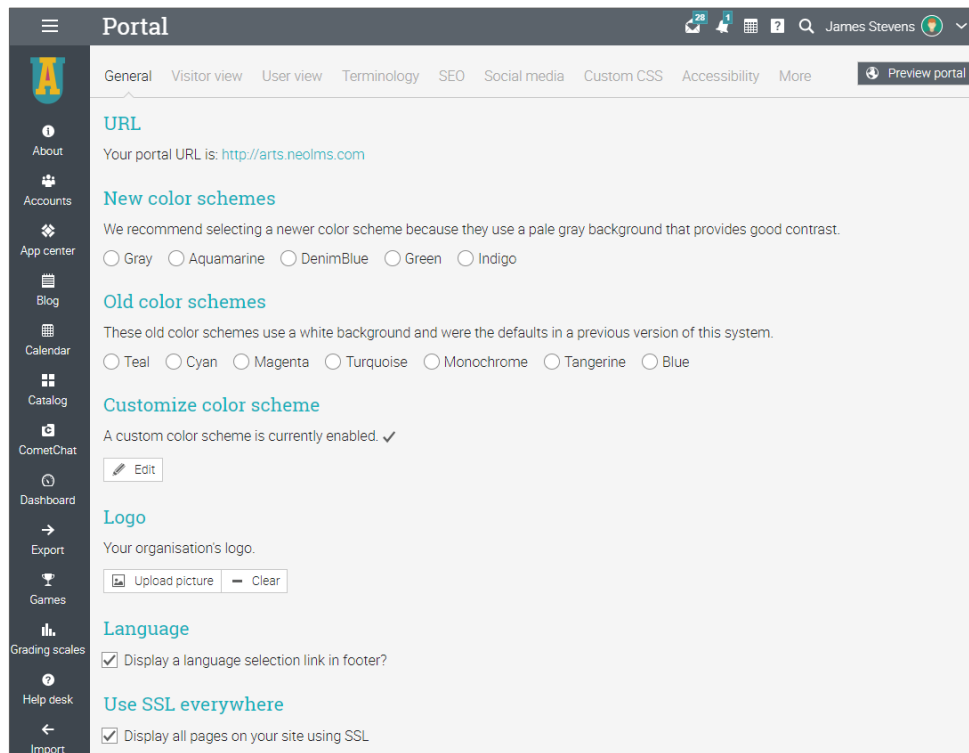
The screenshot displays the 'About' page for Appleton School District. The page is organized into several sections:

- Header:** 'About' title, user profile for James Stevens, and notification icons.
- Organization Info:**
 - Appleton School District:** Description of the district's history and mission.
 - Mission:** 'Our teachers are chosen from the best. Their mission is not to just teach classes, but to prepare the kids for life, help them absorb the knowledge that will serve them in the future.'
 - Classrooms:** 'Our classrooms provide the perfect environment for students to explore and learn. We combine classic learning methods with ultimate learning technology, because from our experience this way of teaching brought us the best results.'
 - Portal:** <http://appleton.neolms.com>
 - Buttons:** 'Edit' and 'Delete site'.
- Info Section:**
 - Basics:**
 - Language: English (US)
 - Time zone: (GMT+02:00) Athens
 - Contact:**
 - Email: none
 - Phone: none
 - Fax: none
 - Address: FL, United States
- Administrators (10):** List of administrators including Olivia Doboaca, Jeremy Blackmore, Alina Toderascu, Zsolt B, and Armando Rangel.
- Teachers (17):** List of teachers including Alina Toderascu, Andreea Pavaloiu, Appleton Admin, Armando Rangel, and Cameron Nesbitt.
- District:** Logo and name 'ADP'.

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Portal customization

Click on Admin/Portal in order to start setting up your options.



The portal administrator page is split into separate categories:

- ✓ **General** - set up your URL, color schemes, logo and language;
- ✓ **Visitor view** - configure how your portal will look for your site's visitors, with options for portal type, title, logo, pages, pictures, menu, panels and footers;
- ✓ **User view** - configure how your portal will look for logged-in users, with options for avatar display, menu bar decoration, home left bar picture, home tabs, left bar, welcome pop-up, shortcuts, and footers;

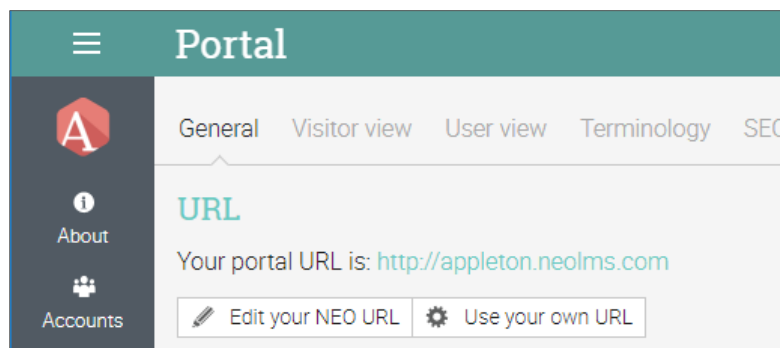
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- ✓ **Terminology** - customize the terminology of your site by adding one or more substitutions;
- ✓ **SEO** - choose if you want your site to be indexed or not, set up a meta-description, catalog URLs and keywords;
- ✓ **Social media** - set up which social media icons you want to show up on your portal, in both the visitor and user view;
- ✓ **Custom CSS** - you can use custom CSS to personalize the site;
- ✓ **Accessibility** - enable portal accessibility options for users with disabilities;
- ✓ **More** - configure options session timeout, default video dimensions, Google analytics, URL redirection, bottom HTM and Whitelisted IP addresses.

Next, we will go over the most important options you need to know in the first phase of customizing the portal.

URL

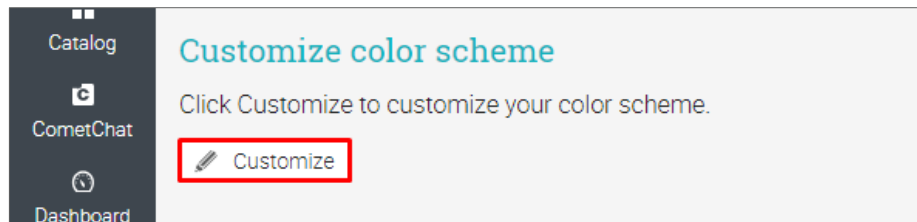
This section displays the current URL of your portal. To change it, click “Edit your NEO URL”, and select a new subdomain. We also provide a way to use your own URL, for which you can find instructions under the Portal topic in the Help Center.



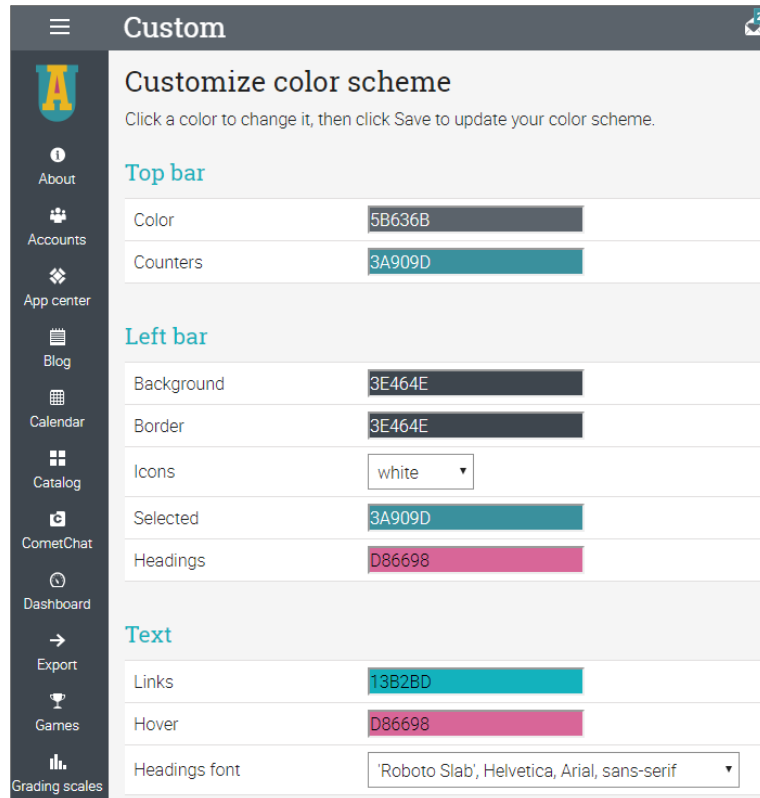
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Color schemes

Choose between our new or old color schemes or you can create/edit your own custom scheme using the Customize button:



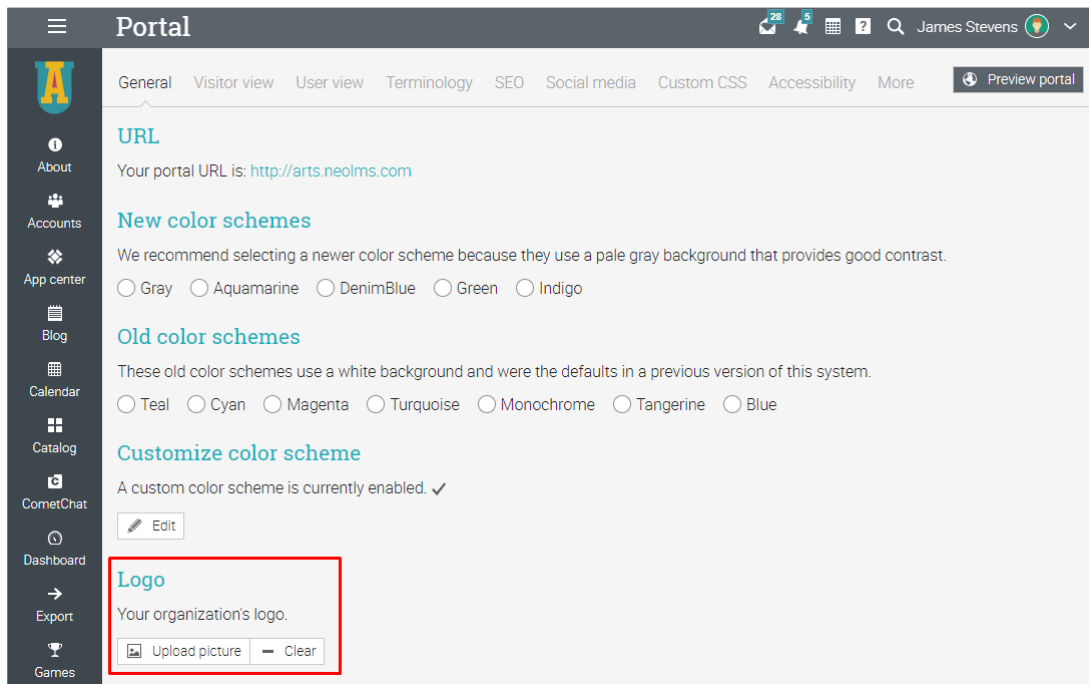
Then select the color values for each graphic element using either the color picker or by directly entering the hex values into the input boxes.



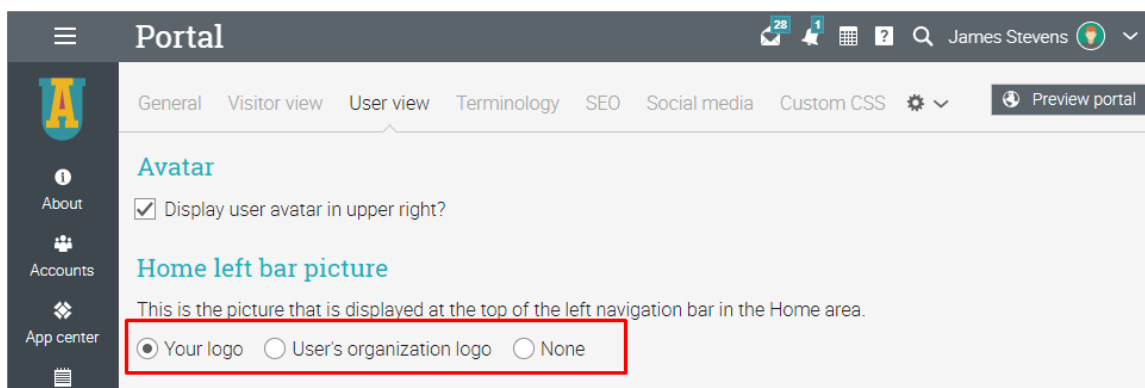
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Logo

To upload a logo, select it from your computer, then click Save.



You can choose whether or not the logo is shown in the home page left bar by clicking the appropriate checkbox in User view.



Getting started guide for Administrators

Portal pages

You can configure Portal pages under Visitor view. Portals have default pages such as Calendar, Catalog, News or Contact. Only those that are enabled show up in the carousel and each page can be edited separately. You can also click on Add to create a custom page.

Portal pages				
Title	Edit	SEO	Enable?	Delete
Catalog	-	-	<input checked="" type="checkbox"/>	-
Calendar	-	-	<input checked="" type="checkbox"/>	-
News	-	-	<input checked="" type="checkbox"/>	-
Contact		-	<input checked="" type="checkbox"/>	-
Sign up		-	<input checked="" type="checkbox"/>	-
About us		+	<input checked="" type="checkbox"/>	
Blog	-	-	<input checked="" type="checkbox"/>	-
Terms and conditions		-	<input checked="" type="checkbox"/>	-

[+ Add](#)

Portal panels

The visitor portal can also be customized using panels. Currently, we have support for the following types of panels:

Add portal panel ✕

Select the type of panel to add:

- Carousel**
A customizable picture carousel
- Clickable text blocks**
Up to six clickable blocks of text
- Counters**
A graphical background with up to three counters
- Custom**
Custom HTML
- Image blocks**
Up to four images, each with a title, text, and a button
- Simple text and button**
A colored background with some text and an optional button
- Text and buttons**
A graphical background with a title, some text, and up to two buttons

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Carousel

The carousel option allows you to add custom pictures, text, HTML and action buttons. To add a new slide, click Add.

The screenshot shows the 'Carousel' configuration page. At the top right is a 'Return' button. Below the title 'Carousel' is a 'Slides' section with a 'Delete' button. A table lists four slides with columns for 'Title', 'Page', 'Edit', and 'Enable?'. Below the table is an 'Add' button. The 'Speed' section shows a dropdown menu set to '6' seconds.

Title	Page	Edit	Enable?
Welcome to the University of Arts	About us		<input checked="" type="checkbox"/>
Follow your passion	Contact		<input checked="" type="checkbox"/>
Catalog	Catalog		<input checked="" type="checkbox"/>
Easy and enjoyable	Sign up		<input checked="" type="checkbox"/>

Counters

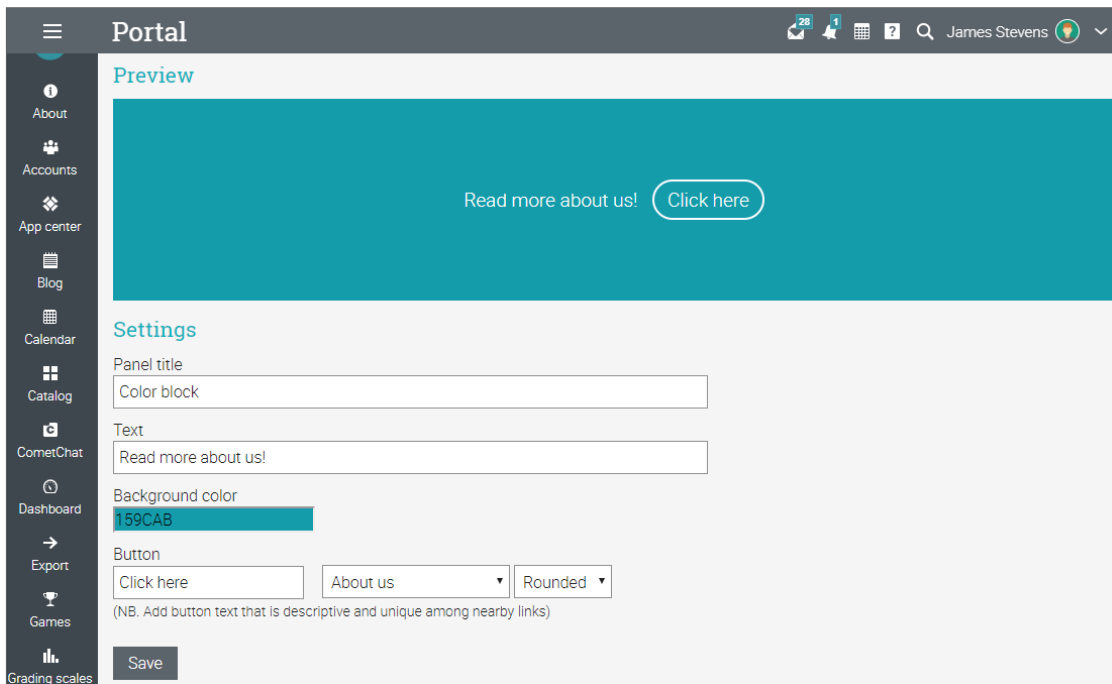
This option allows you to add a graphical background with up to three counters with relevant information for your school. Enter the text and numbers for each counter, choose a picture and click Save.

The screenshot shows the 'Counters' configuration page. At the top is a 'Preview' section with a background image of a washing machine drum. Three counters are displayed: '200 Teachers', '500 Subjects', and '12 Years of excellence'. Below is a 'Settings' section with a 'Panel title' field set to 'University of Arts'. A note states: 'Note that if you leave the counter value of a block blank, the block will be hidden.' Three counter settings are shown: Counter 1 (200, Teachers), Counter 2 (500, Subjects), and Counter 3 (12, Years of excellence). A 'Background' field is at the bottom.

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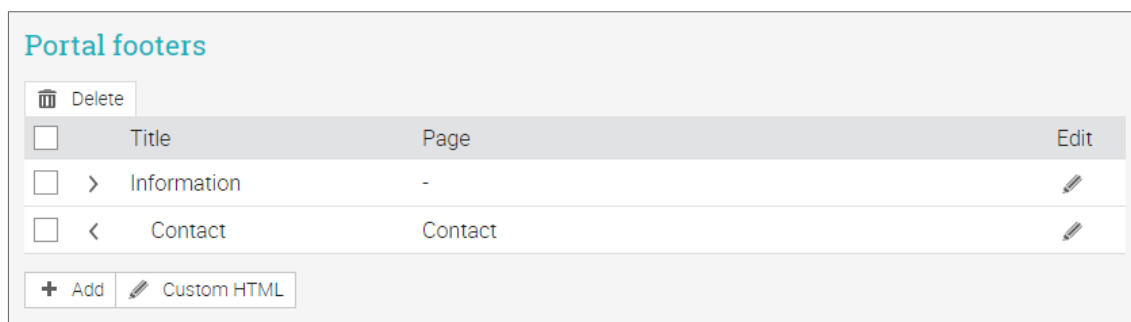
Simple text and button

If you want to separate two panel types that are very graphical, you can add a colored background with text and an optional button.



Footers

You can customize the footer area of your portal. To add a new footer, click on Add, enter its name, URL, and choose whether or not a new window is displayed when the footer is clicked, then click Save.



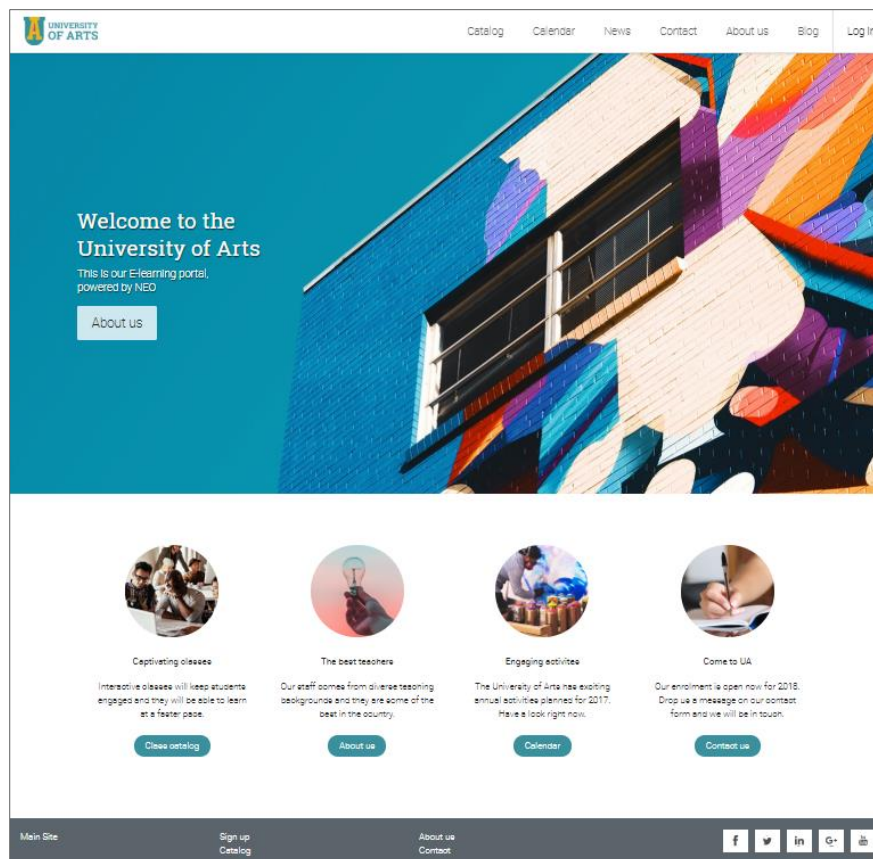
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Terminology

You can customize the terminology of the platform adding one or more substitutions. These substitutions apply to all built-in text which appears on tabs, buttons, headings, instructions and tips. Click on Add, then enter the original text and its replacement.

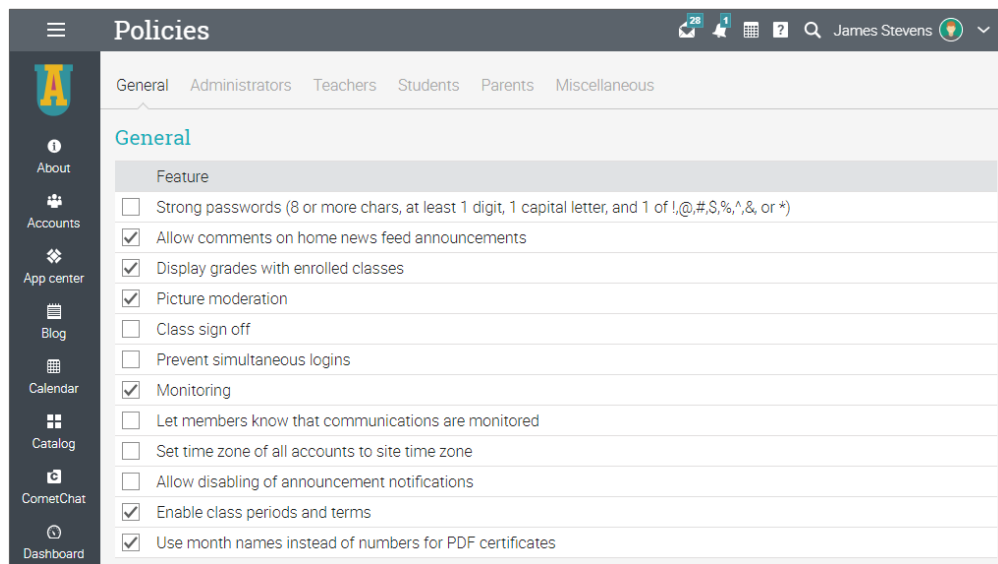


Here is how a school portal can look like for visitors:



Setting up policies

There are many policies that you can set for your site, such as the features that students, teachers, administrators and parents can access. It is one of the most important things for an administrator to do. Go to Admin/Policies to start setting up your options.



Here are more details on some of the options:

Monitoring

If enabled, you can create monitor accounts. Monitors are read-only administrators that can access most pages of a site but cannot change anything. If you enable monitoring, you can also enable it for use by teachers, in which case they can monitor the communications of students in their classes.

Prevent simultaneous logins

If this feature is enabled, a student can only be logged on via a single session. When they start a new session, any of their previous sessions are automatically terminated.

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Let members know that communications are monitored

If you check this option, it lets members know their communications are monitored. They will see a small notification: "your school monitors communications for offensive language", when composing messages or using chat rooms.

Set time zone of all accounts to site time zone

If enabled, set all user time zones to the time zone of your school.

Allow comments on home news feed announcements

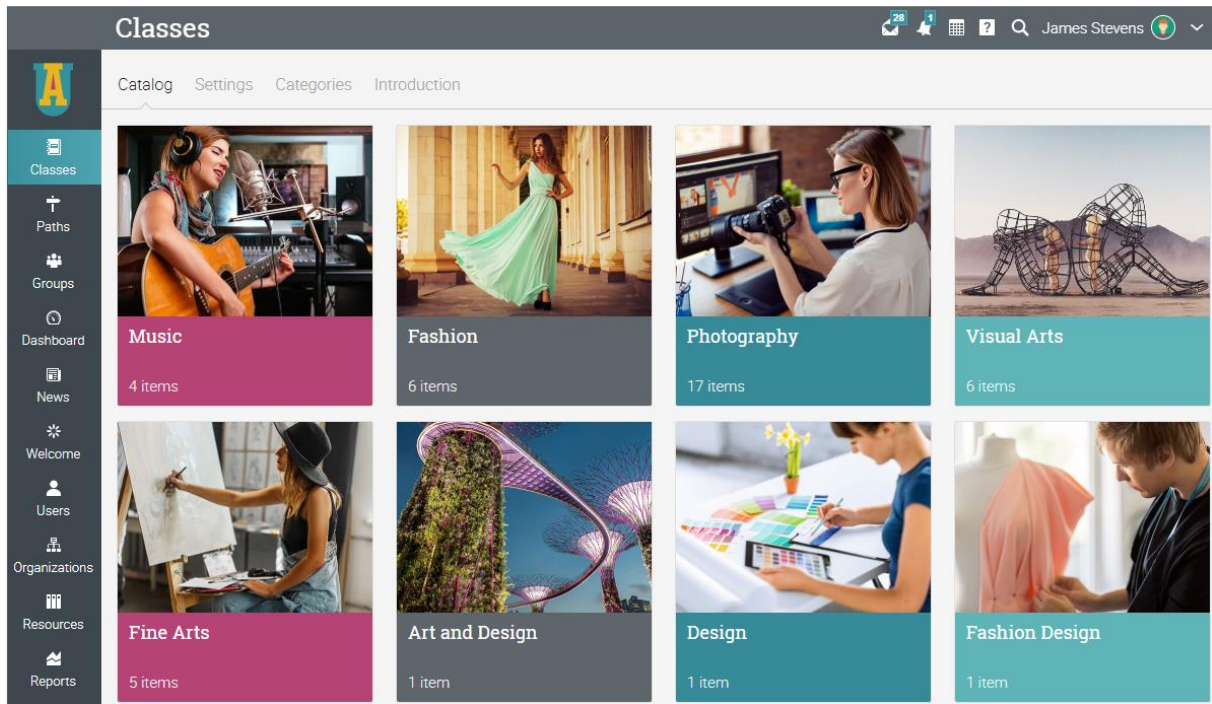
If enabled, users can add comments on home news feed announcements.



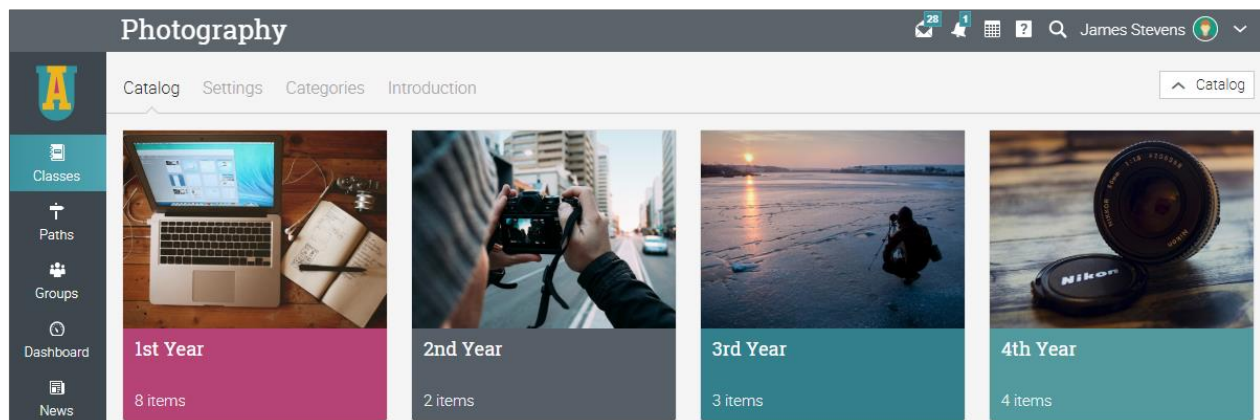
Getting started guide for Administrators

Configuring the class catalog

The class catalog showcases the classes that are available for students. You can find it under Classes/Catalog.



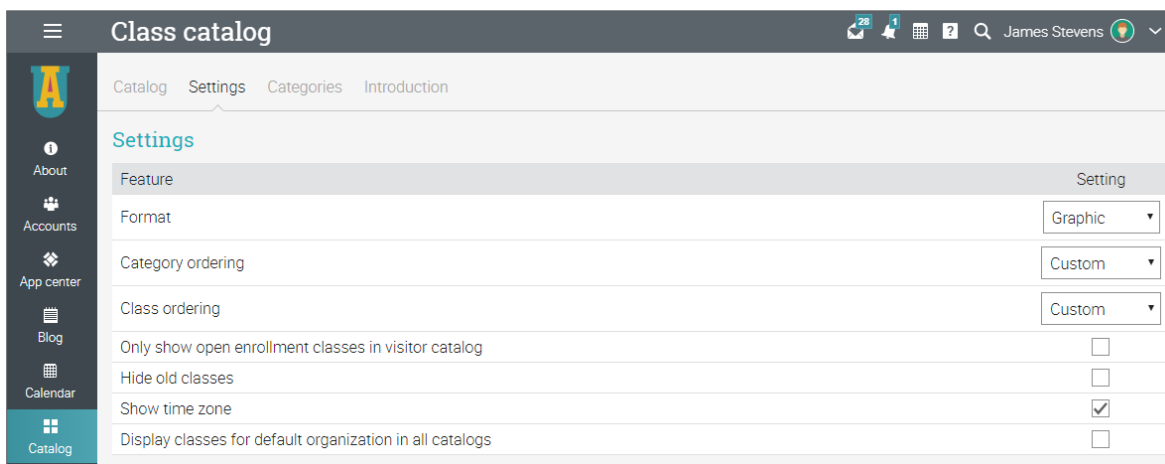
Items are organized by categories and subcategories to make it easier for students to find them.



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To configure the class catalog, visit the Settings area. Your options are as follows:

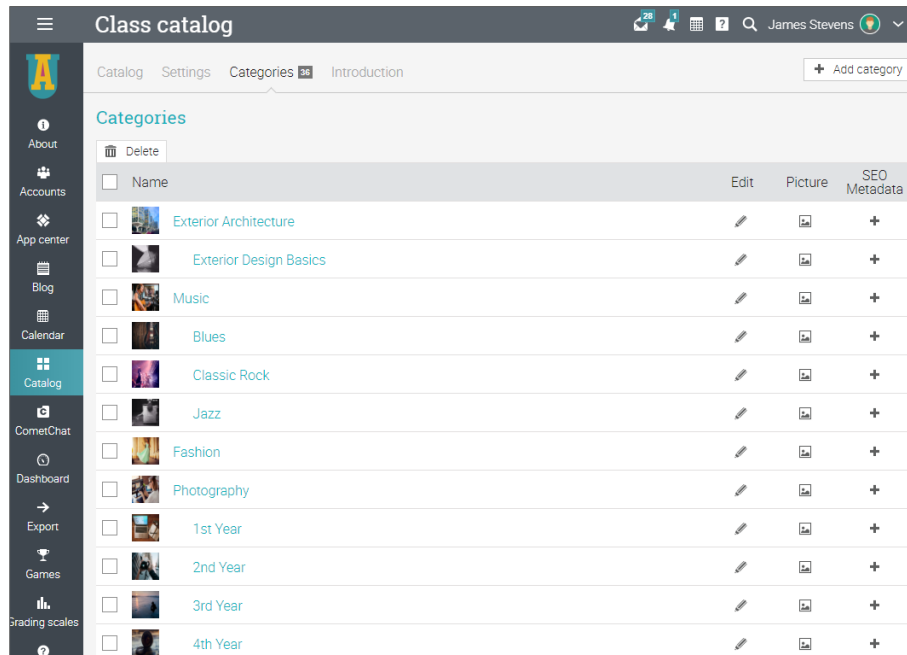
- ✓ [Format](#) - choose between Flat, Hierarchical, or Graphic;
- ✓ [Category ordering](#) - choose between Alphabetical or Custom. If you choose Custom, you can reorder the categories using drag and drop;
- ✓ [Class ordering](#) - choose between Alphabetical or Custom. If you choose Custom, you can reorder the classes using drag and drop;
- ✓ [Only show open enrollment classes in visitor catalog](#) - you can set classes to have an open enrollment for visitors of your site. With this option they can only see what is available to them;
- ✓ [Hide old classes](#) - hide classes that have started over a week ago;
- ✓ [Show time zone](#) - include the class time zone in the listings;
- ✓ [Display classes for default organization in all catalogs](#) - if you have enabled multiple organizations for your platform, the default organization's classes will appear in all catalogs.



Getting started guide for Administrators

Categories

All currently used categories and subcategories are listed in the Categories section. You can change the descriptions and the picture associated with a category. You can even add a metadata description and keywords for a category, under SEO Metadata.

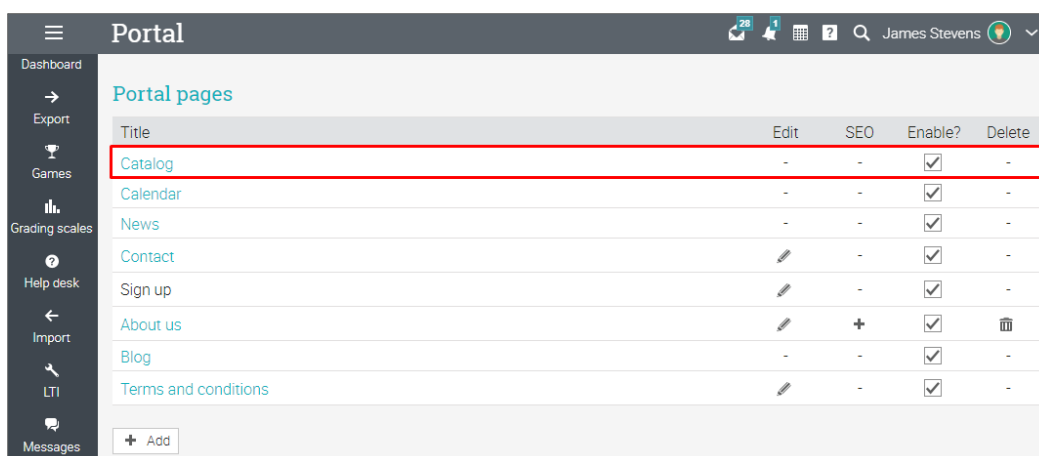


The screenshot shows the 'Class catalog' interface. The top navigation bar includes 'Catalog', 'Settings', 'Categories', and 'Introduction'. A 'Delete' button is visible above the table. The table lists various categories with columns for 'Name', 'Edit', 'Picture', and 'SEO Metadata'.

Name	Edit	Picture	SEO Metadata
Exterior Architecture			
Exterior Design Basics			
Music			
Blues			
Classic Rock			
Jazz			
Fashion			
Photography			
1st Year			
2nd Year			
3rd Year			
4th Year			

Configure visitor access to the catalog

To allow portal visitors to browse the catalog, go to Admin Portal and find the Visitor view tab. Enable Catalog from the Portal pages section.



The screenshot shows the 'Portal' interface. The top navigation bar includes 'Dashboard', 'Export', 'Games', 'Grading scales', 'Help desk', 'Import', 'LTI', and 'Messages'. The 'Portal pages' section contains a table with columns for 'Title', 'Edit', 'SEO', 'Enable?', and 'Delete'. The 'Catalog' row is highlighted with a red border.

Title	Edit	SEO	Enable?	Delete
Catalog	-	-	<input checked="" type="checkbox"/>	-
Calendar	-	-	<input checked="" type="checkbox"/>	-
News	-	-	<input checked="" type="checkbox"/>	-
Contact		-	<input checked="" type="checkbox"/>	-
Sign up		-	<input checked="" type="checkbox"/>	-
About us		+	<input checked="" type="checkbox"/>	
Blog	-	-	<input checked="" type="checkbox"/>	-
Terms and conditions		-	<input checked="" type="checkbox"/>	-

Configuring grading scales

Grading scales can be configured via Admin/Grading scales. You can set the default grading scale that every class is initialized with. You can edit the default grading scale and add your own.

Standard grading scales

Grading scales

Here are your standard grading scales:

Standard regular grading scale (Default)

Number of classes, class templates, and assignments using this percentage grading scale: 24

Grade	Minimum%	Letter%
100	95	97.5
A	90	92.5
A-	85	87.5
B+	80	82.5
B	75	77.5
B-	70	72.5
C+	65	67.5
C	60	62.5
C-	55	57.5
D+	50	52.5
D	45	47.5
D-	40	42.5
F	0	20

[+ Add standard grading scale](#)

[Edit](#) [Reset to initial values](#) [Make all classes use this grading scale](#)

Community grading scale

No classes, class templates, or assignments using this percentage grading scale.

Grade	Minimum%	Letter%
A+	95	97.5
A	90	92.5
A-	85	87.5
B+	80	82.5
B	75	77.5
B-	70	72.5
C+	65	67.5
C	60	62.5
C-	55	57.5
D+	50	52.5
D	45	47.5
D-	40	42.5

Getting started guide for Administrators

If you have multiple grading scales, when you create a class, you can select the grading scale for that specific class. See the Options tab in the Add class pop-up. You can also add a different grading scale for each assignment.

The screenshot shows a dashboard interface with a sidebar on the left containing navigation icons for Classes, Paths, Groups, Dashboard, News, Welcome, Users, Organizations, Resources, Reports, and Admin. The main content area is titled 'Dashboard' and features a 'Teaching' section with an 'Add a class' pop-up window. The pop-up has two tabs: 'Overview' and 'Options', with 'Options' selected and highlighted by a red box. The 'Options' tab contains several form fields: Language (English (US)), Time zone (GMT+00:00 UTC), Course (*), Section (*), Period (*), Term (*), Semester (*), Credits (*), and Organization (University of Arts). A 'Grading scale' dropdown menu is also present, highlighted by a red box, and is open, showing a list of options: Standard regular grading scale (highlighted in blue), Community grading scale, Europe grading scale, Grading scale, Grading scale for Arts, Standard pass/fail grading scale, Standard pass/fail grading scale, and Sweden grading scale. A 'Save' button is visible at the bottom right of the pop-up. The background dashboard includes a calendar for April 2018, a 'Class catalog' button, a 'Site wide game' section with a progress indicator, and 'Notifications' and 'Announcements' sections.

Creating accounts

Everyone who wants to use the site must have an account. The types of accounts that can be created in NEO are:

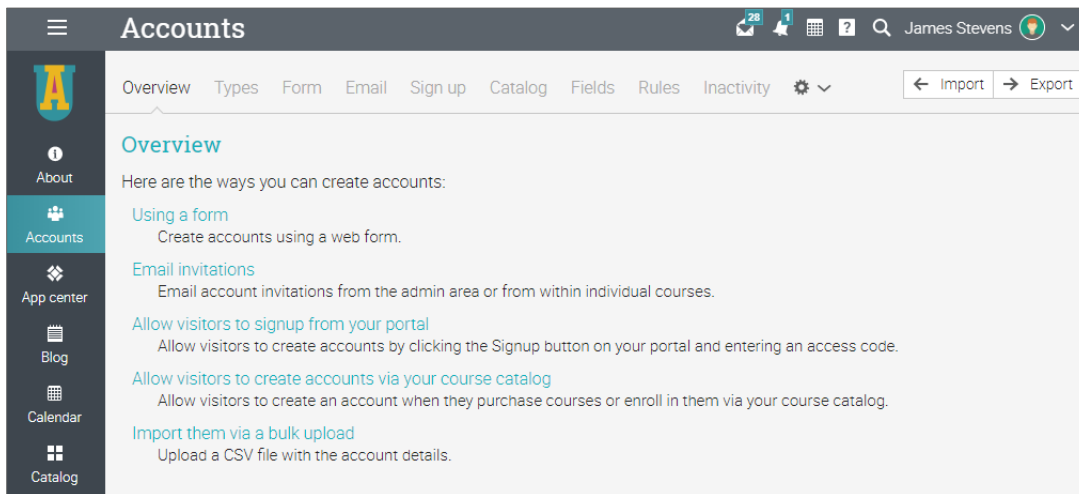
- ✓ **Student** - can enroll in classes, submit assignments, communicate with teachers and friends, use collaboration tools;
- ✓ **Teacher** - can create and teach classes, create and grade assignments, communicate with students;
- ✓ **Administrator** - has full privileges on the site, can customize the site, set policies, create accounts;
- ✓ **Teaching assistant** - can help teachers run classes but cannot change class content or delete a class;
- ✓ **Parent** - can access the site as well as track their children's progress;
- ✓ **Partial administrator** - can administer only certain aspects of the site;
- ✓ **Monitor** - read-only administrator that can access most pages of a site but cannot change anything.



Getting started guide for Administrators

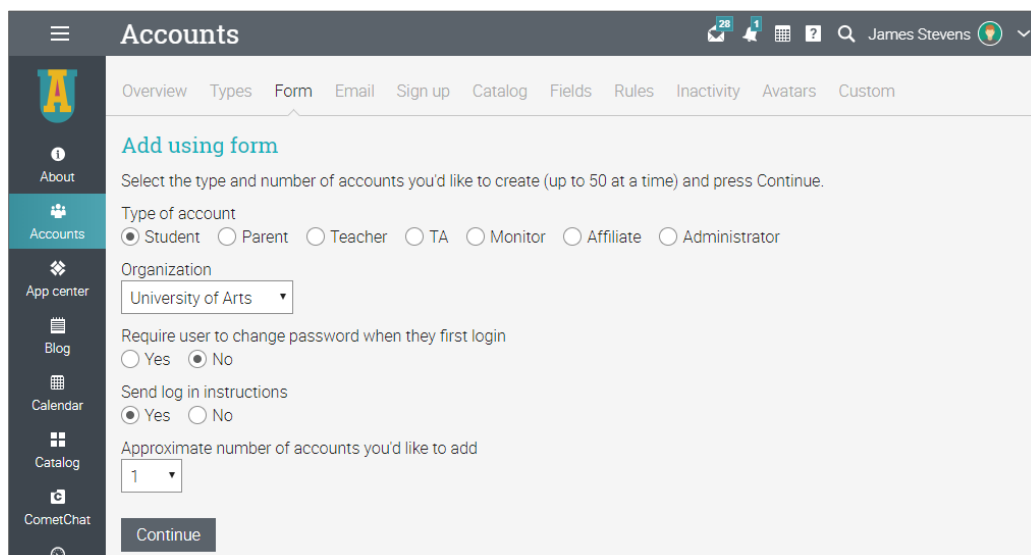
Adding accounts

Go to Admin/Accounts to find your options for adding accounts:



Add accounts using a form

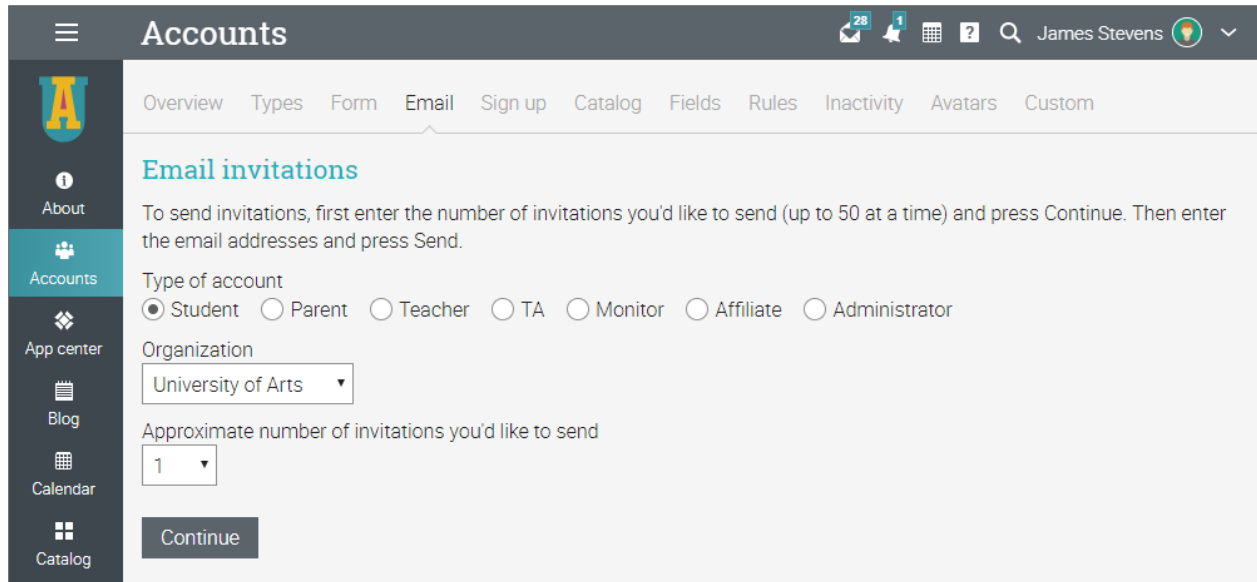
This option allows you to quickly add accounts using a form. To start adding accounts visit the Form tab. Select the initial type of account you want to create, whether you want to send login instructions, whether you require the users to change their passwords when they first log in, and the approximate number of accounts you want to add.



Getting started guide for Administrators

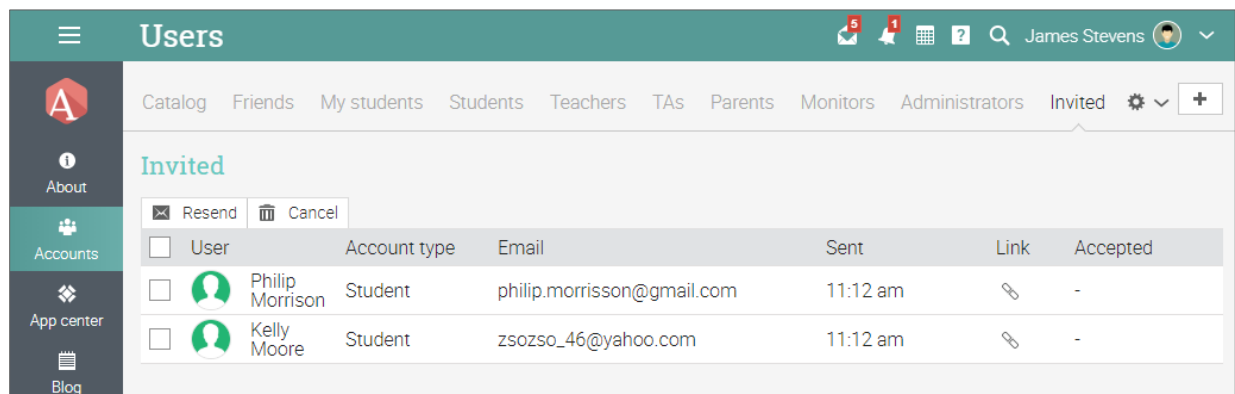
Email invitations

To invite users via email, visit the Email tab. Select the initial type and approximate number of invitations that you want to send, then click Continue.







The screenshot shows the 'Accounts' interface with the 'Email' tab selected. The page title is 'Accounts' and the user is 'James Stevens'. The 'Email' tab is active, showing the 'Email invitations' section. The instructions state: 'To send invitations, first enter the number of invitations you'd like to send (up to 50 at a time) and press Continue. Then enter the email addresses and press Send.' The form includes a 'Type of account' section with radio buttons for Student (selected), Parent, Teacher, TA, Monitor, Affiliate, and Administrator. The 'Organization' is set to 'University of Arts'. The 'Approximate number of invitations you'd like to send' is set to '1'. A 'Continue' button is visible at the bottom.

The email invitation is sent but the account is not created until the user accepts the invitation and then goes through the normal sign up process. You can see a list of invited people by going to the Users catalog in the left bar, under the Invited tab. Resend the invitations if needed.



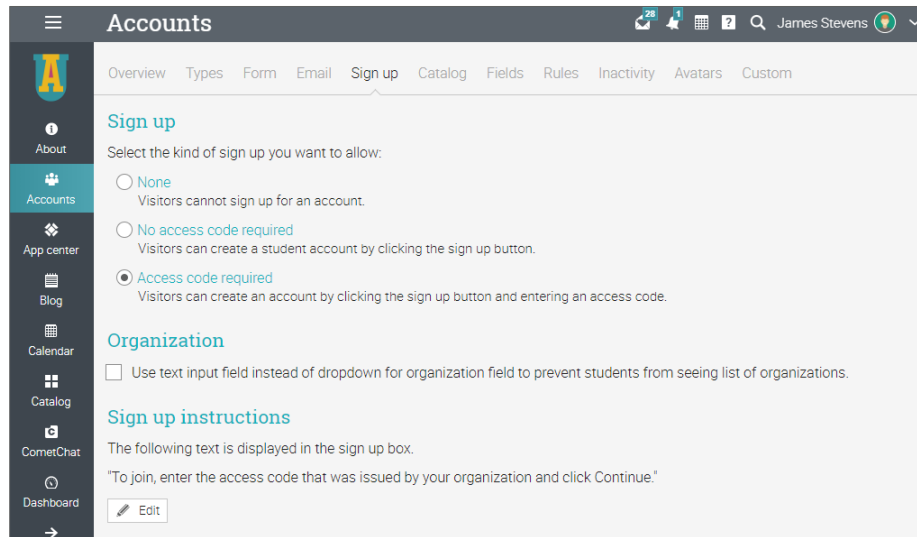
The screenshot shows the 'Users' interface with the 'Invited' tab selected. The page title is 'Users' and the user is 'James Stevens'. The 'Invited' tab is active, showing a table of invited users. The table has columns for 'User', 'Account type', 'Email', 'Sent', 'Link', and 'Accepted'. There are two rows of data.

<input type="checkbox"/>	User	Account type	Email	Sent	Link	Accepted
<input type="checkbox"/>	 Philip Morrison	Student	philip.morrisson@gmail.com	11:12 am		-
<input type="checkbox"/>	 Kelly Moore	Student	zsozso_46@yahoo.com	11:12 am		-

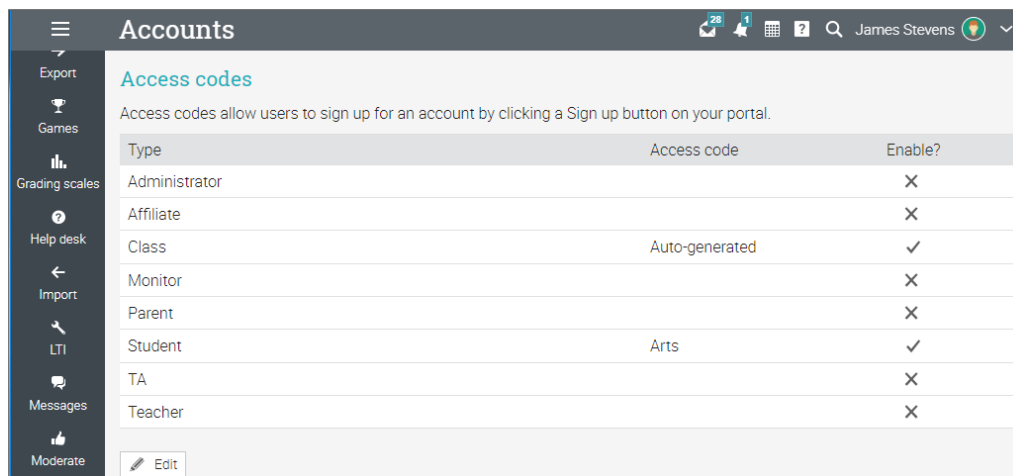
Getting started guide for Administrators

Configure sign up

Generate access codes that allow users to create accounts. To start configuring sign up, visit the Sign up tab.



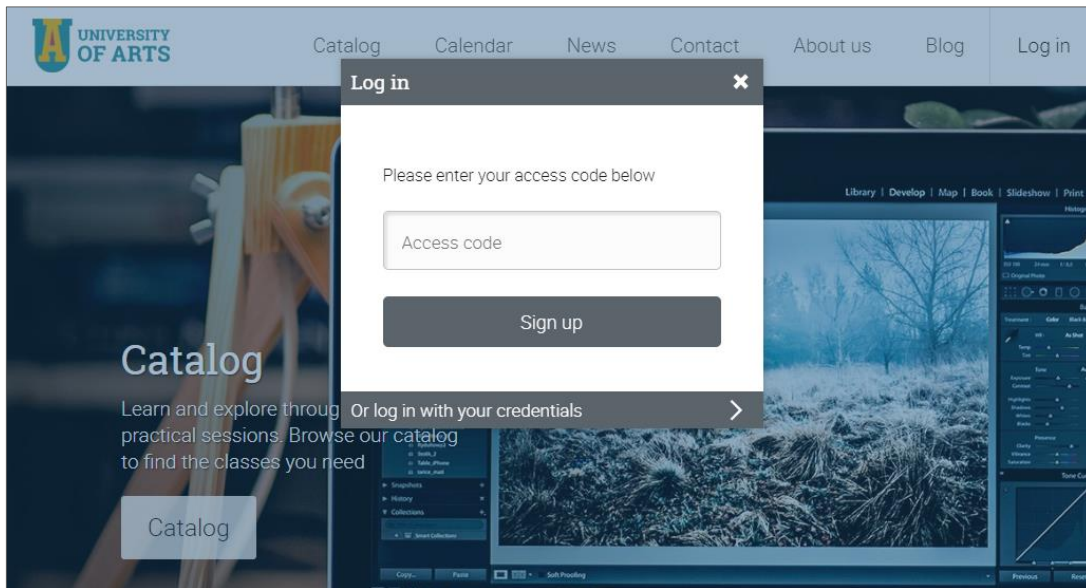
If you choose the sign up option without an access code, users can create accounts just by clicking the Sign up button, then entering their account details. If you want to use access codes, you can set them up in the Access codes area.



Each user type can have its own access code. Codes can be either active all the time or for a limited period.

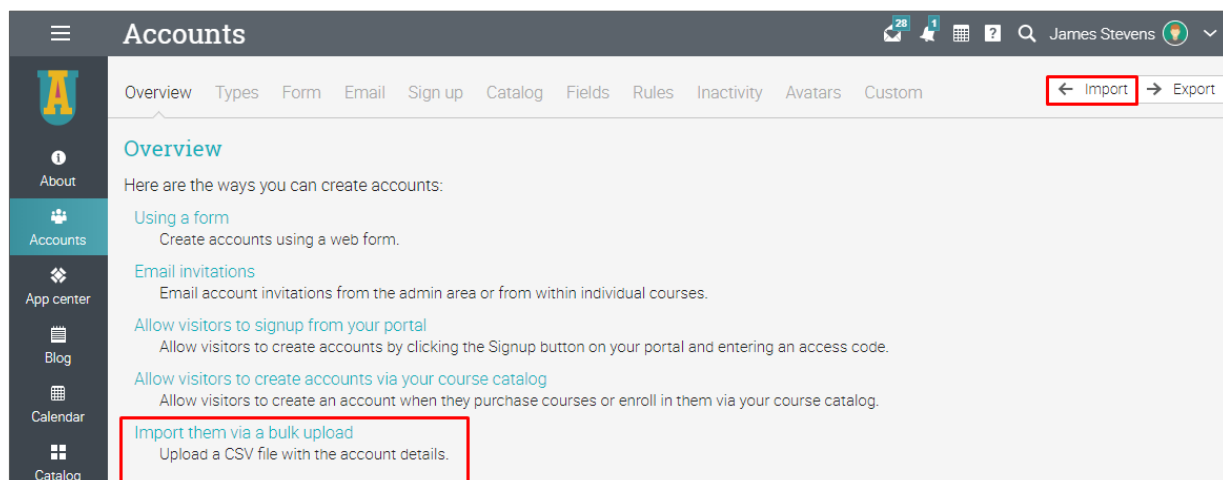
Getting started guide for Administrators

Students can then join the site by clicking the Sign up with an access code option, entering the code and the required account information.



Import accounts from a file

This option allows you to quickly create or update accounts by importing the information from a comma-separated value (CSV) file.



Getting started guide for Administrators

Select the initial type of account you want to create, then choose the file from your computer that contains the CSV rows and indicate which value is in which column.

The screenshot shows the 'Import accounts' interface. The 'File' section has a red box around the 'Add file' button. The 'Values' section is a table with columns 'Value' and 'Column'.

Value	Column
First name	None
Last name	None
Nickname	None
User ID	None
Password	None
Organization	None

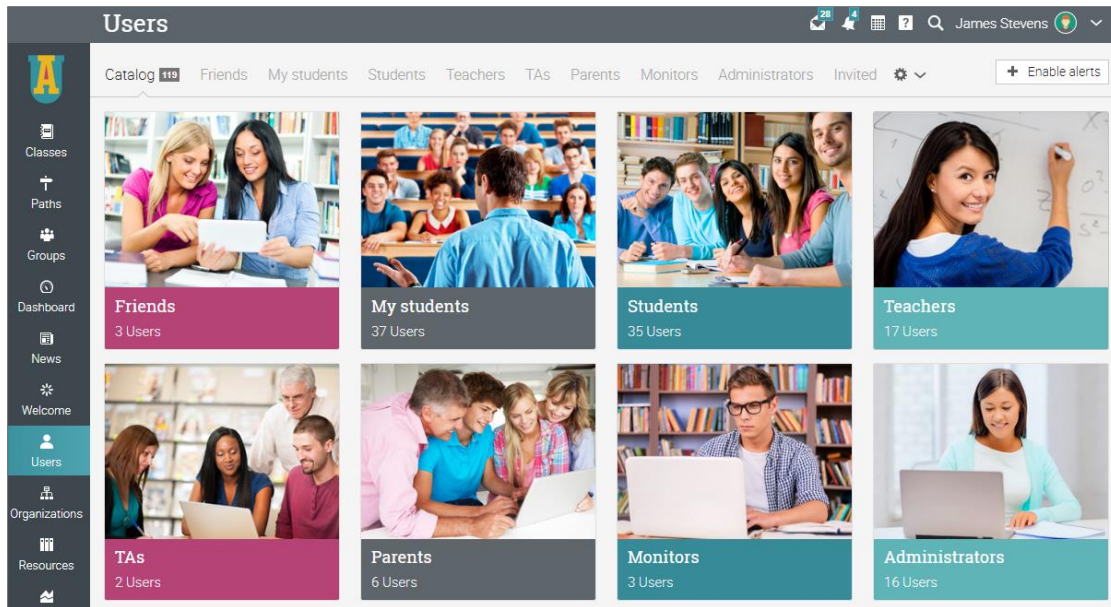
Every field except for the first and last name is optional. If you omit a user ID and/or password, they are given unique values automatically. You have a few more options such as requiring users to change password on their first login, the click Continue.

The screenshot shows the 'Options' section of the 'Import' interface. It includes a dropdown for 'Organization' (University of Arts), radio buttons for 'Dry run', 'Require user to change password', 'Update passwords', and 'Send log in instructions', and a 'Continue' button.

Getting started guide for Administrators

Managing users

You can see an overview of all users in the school by visiting the Users Catalog. Click on a category to see more details about a user group.



For example, if you click on Students, you can perform several actions such as: sending messages, viewing their grades, awarding badges and certificates, archiving students or even removal from the platform.

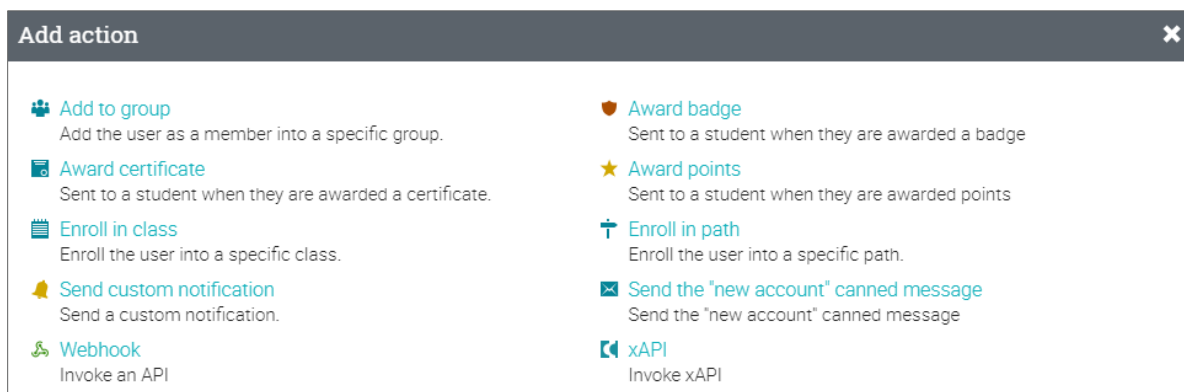
The screenshot shows the 'Users' interface with the 'Students' group selected. The top navigation bar is the same as in the previous image. The main content area is titled 'Students' and features a toolbar with icons for Message, Grades, Portfolio, Passwords, Award, Transfer, Edit, Remove, and Archive. Below the toolbar is a table with columns for Student, Classes, Completed, Deactivated, Groups, Awards, Parents, and Last visited. The table contains seven rows of student data.

Student	Classes	Completed	Deactivated	Groups	Awards	Parents	Last visited
<input type="checkbox"/> Bertalan, Zsolt	5	3	2	15	25		Online
<input type="checkbox"/> Blyne, Damian	3	2	2	6	19		1 day ago
<input type="checkbox"/> Dillon, James	1						13 days ago
<input type="checkbox"/> Doboaca, Olivia	3			7	8		about 22 hours ago
<input type="checkbox"/> Dove, Rob	1	2	2	5	8		62 days ago
<input type="checkbox"/> Duvan, Tom	8	2	1	6	13		63 days ago

Getting started guide for Administrators

Using automation

Automation allows you to set up rules that should be performed when students enroll in groups, complete classes and learning paths and even when they fall behind on their mastery levels. For example, you can define rules that trigger actions such as sending a custom message when students enroll in a class or sending a notification when an account becomes inactive. Administrators are usually responsible for setting rules for accounts, while teachers add rules for classes and learning paths. Here is a list of rules that you can add:

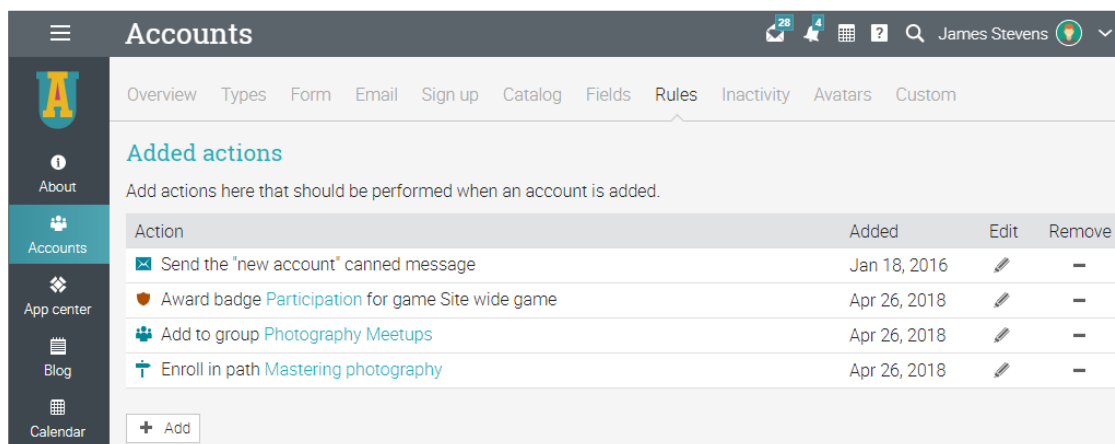


The 'Add action' dialog box displays a list of automation actions:

- Add to group**: Add the user as a member into a specific group.
- Award certificate**: Sent to a student when they are awarded a certificate.
- Enroll in class**: Enroll the user into a specific class.
- Send custom notification**: Send a custom notification.
- Webhook**: Invoke an API.
- Award badge**: Sent to a student when they are awarded a badge.
- Award points**: Sent to a student when they are awarded points.
- Enroll in path**: Enroll the user into a specific path.
- Send the "new account" canned message**: Send the "new account" canned message.
- xAPI**: Invoke xAPI.

Adding rules for accounts

You can define actions that occur when accounts are created. Accounts rules include actions that are triggered when users are added and when users are inactive. To add rules, visit the Accounts/Rules section:



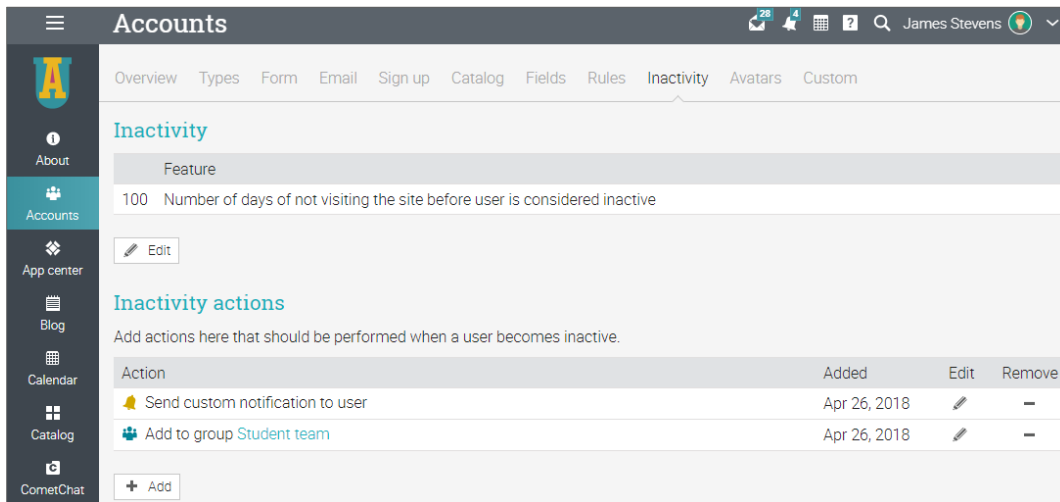
The screenshot shows the 'Accounts' section with the 'Rules' tab selected. The 'Added actions' section contains the following table:

Action	Added	Edit	Remove
Send the "new account" canned message	Jan 18, 2016		
Award badge Participation for game Site wide game	Apr 26, 2018		
Add to group Photography Meetups	Apr 26, 2018		
Enroll in path Mastering photography	Apr 26, 2018		

At the bottom of the table is an '+ Add' button.

Getting started guide for Administrators

To add inactivity actions, visit the Inactivity tab:



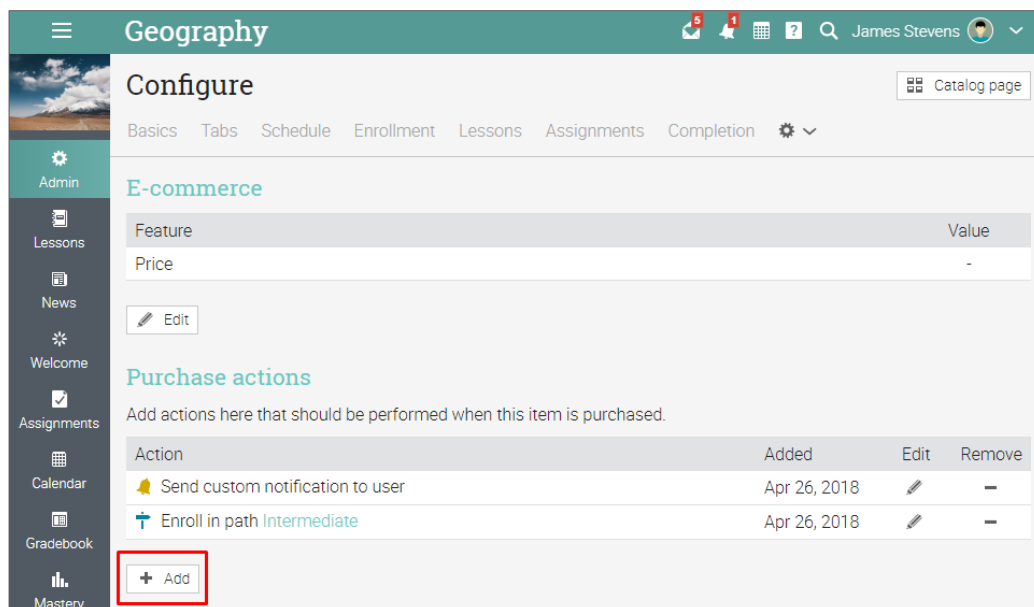
The screenshot shows the 'Accounts' configuration page in the 'Inactivity' tab. The page has a sidebar with navigation options: About, Accounts, App center, Blog, Calendar, Catalog, and CometChat. The main content area is titled 'Inactivity' and contains a table with one row: Feature '100' with the description 'Number of days of not visiting the site before user is considered inactive'. Below this is an 'Edit' button. The 'Inactivity actions' section is titled 'Add actions here that should be performed when a user becomes inactive.' and contains a table with two rows of actions:

Action	Added	Edit	Remove
Send custom notification to user	Apr 26, 2018		-
Add to group Student team	Apr 26, 2018		-

At the bottom of the actions table is an '+ Add' button.

Adding rules for e-commerce

If you have e-commerce enabled, you can also set up e-commerce rules for classes, subscriptions, bundles and so on. For example, to add a purchase actions from the E-commerce tab in the class configuration area:



The screenshot shows the 'Geography' configuration page in the 'Configure' tab. The page has a sidebar with navigation options: Admin, Lessons, News, Welcome, Assignments, Calendar, Gradebook, and Mastery. The main content area is titled 'Configure' and contains a table with one row: Feature 'Price' with the value '-'. Below this is an 'Edit' button. The 'Purchase actions' section is titled 'Add actions here that should be performed when this item is purchased.' and contains a table with two rows of actions:

Action	Added	Edit	Remove
Send custom notification to user	Apr 26, 2018		-
Enroll in path Intermediate	Apr 26, 2018		-

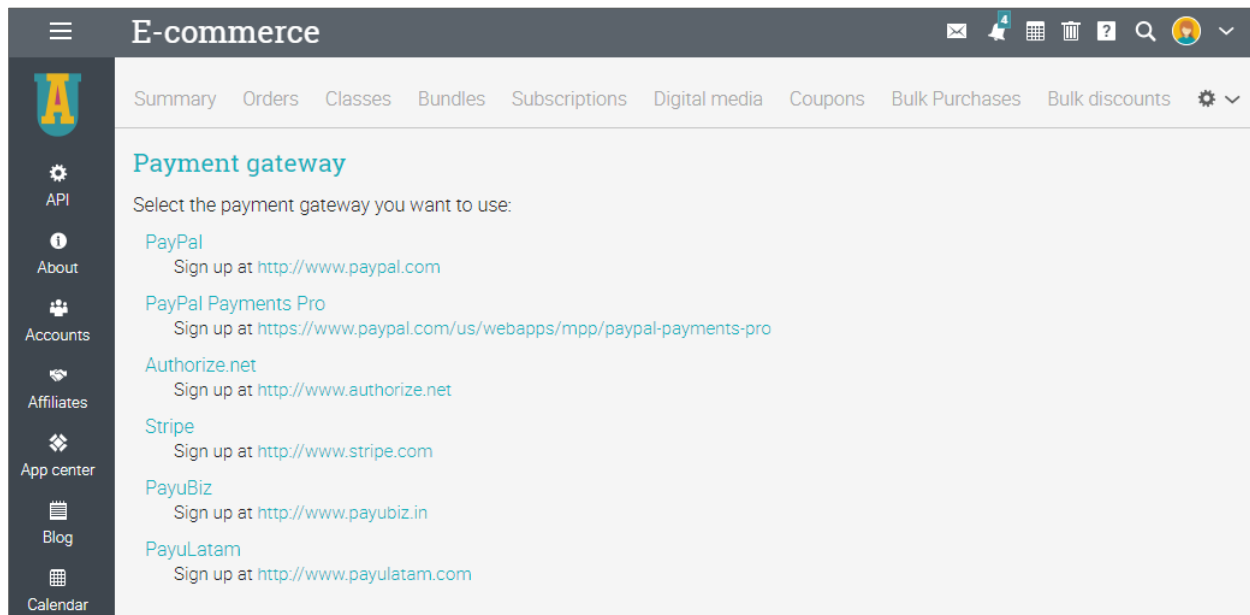
At the bottom of the actions table is an '+ Add' button, which is highlighted with a red box.

Configuring e-commerce

The e-commerce feature allows schools to sell classes, subscriptions, bundles, and digital media through their NEO portal. Visitors and users can browse the catalog, see a detailed description of the classes offered, use coupon codes and more. To enable E-commerce, go to Admin/App center and install E-commerce.

Payment gateway configuration

To configure the payment gateway, go to the Payment gateway tab. We currently have support for PayPal, PayPal Payment Pro, Authorize.net, Stripe, PayU LatAm and PayUbiz as payment gateways.

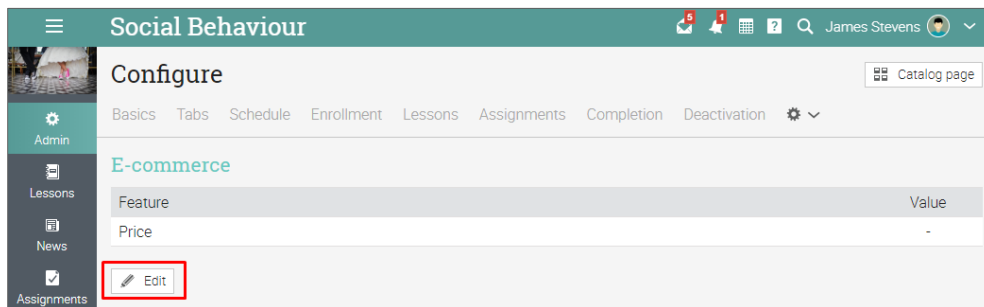


Choose one of them and link your existing account. More details on configuring each payment gateway can be found by visiting the Help Center under the E-commerce topic.

Getting started guide for Administrators

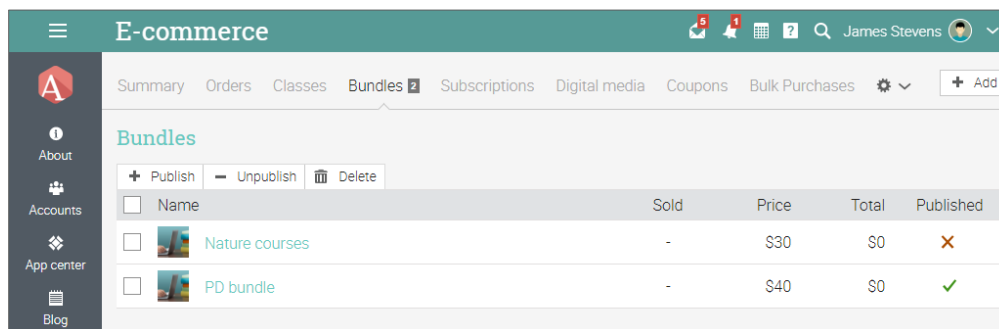
Setting prices for classes

To set a price for a class, go to the class configuration area and visit the E-commerce tab. Here you can add the price for the class and coupon codes:



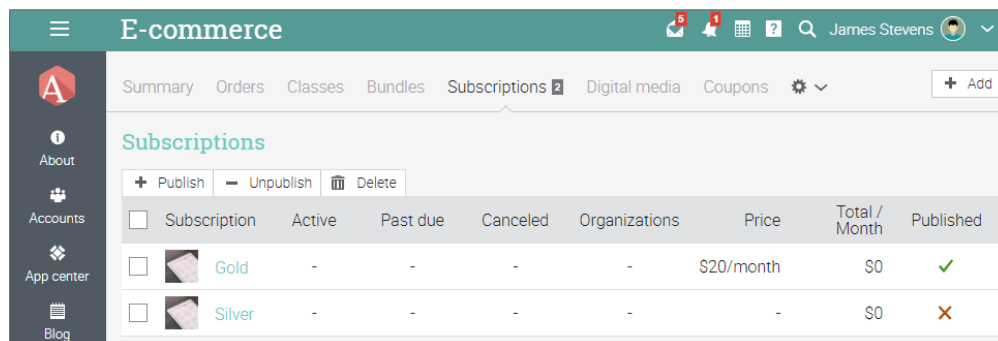
Adding bundles

You can combine classes and digital media into a bundle and sell them as a package. To create a new bundle, go to Admin/E-commerce and visit the Bundles tab:



Adding subscription plans

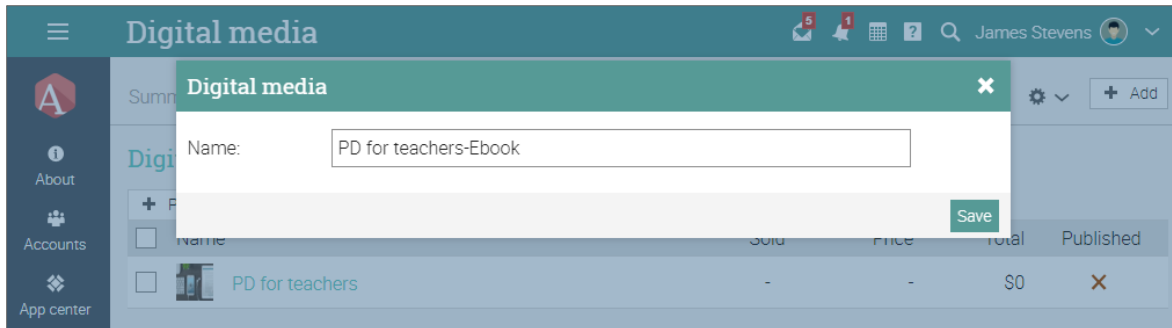
You can create subscription plans comprised of classes and digital media that visitors can purchase for a monthly or yearly fee. To create a new subscription, go to Admin/E-commerce and visit the Subscriptions tab.



Getting started guide for Administrators

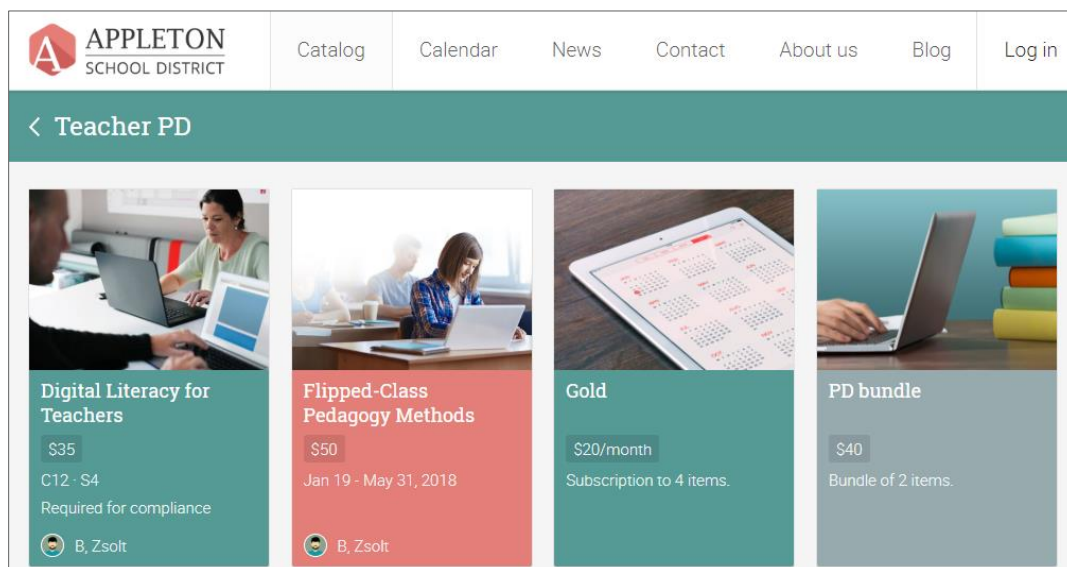
Digital media

You can also sell digital media items such as videos, audio files and pdf documents, just as you would sell classes. To add your files, visit the Digital Media tab under Admin/E-commerce.



Shopping and checkout experience

Site visitors can browse your classes and other learning items by accessing the class catalog on your main portal. Students can also purchase classes, digital media, bundles or subscriptions through the catalog.



Getting started guide for Administrators

Visitors can add items to their shopping cart. They can also use coupons and discounts and create an account if they don't already have one.

The screenshot shows the Appleton School District website. The top navigation bar includes links for Catalog, Calendar, News, Contact, About us, Blog, and Log in. The main content area is titled 'Digital Literacy for Teachers'. On the left, there is a sidebar with the instructor's name 'Zsolt B' and a 'Purchase for \$35' button highlighted with a red box. Below this, course details are listed: Category: Education, Teacher PD; Grades: K to HigherEd; Style: Self paced; Time zone: Athens; Course code: C12. The main content area features a 'Lessons' section with three items: 1. Introduction to Digital Literacy, 2. Digital Literacy and Education, and 3. Digital Literacy versus Computer Literacy. A 'Prerequisites' section below lists 'Flipped Classroom Methods'.

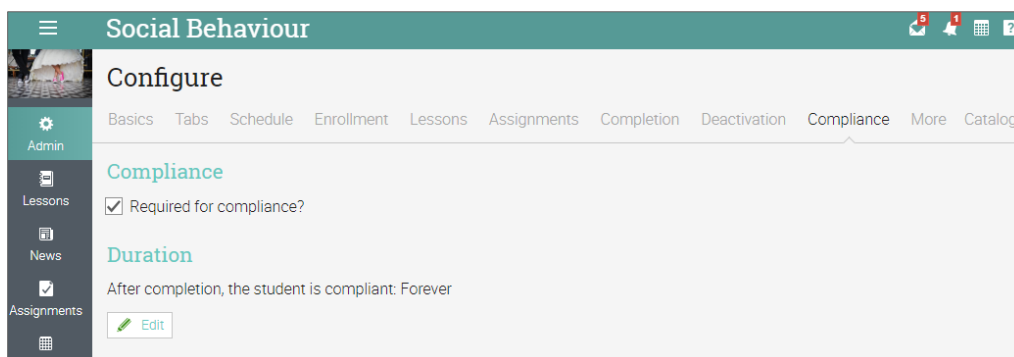
After the purchase, users can see the purchased items on their dashboard and enroll in the classes or access the items:

The screenshot shows a user's dashboard. The top navigation bar includes links for Enrolled, Purchases (selected), Groups, and Compliance. The main content area displays a list of purchased items: 'Portrait Photography' (Status: Deactivated, Quantity: 1, Amount: \$10.00), 'Photography' (Status: Deleted, Quantity: 1, Amount: \$20.00), and 'Gold' (Status: Deleted, Quantity: 1, Amount: \$35.00). A 'To-do' section on the right shows 'Set profile description' and '9 assignments due'. A 'Compliance' section shows 'How to use your DSLR'. A calendar for December 2017 is also visible, with the 13th highlighted.

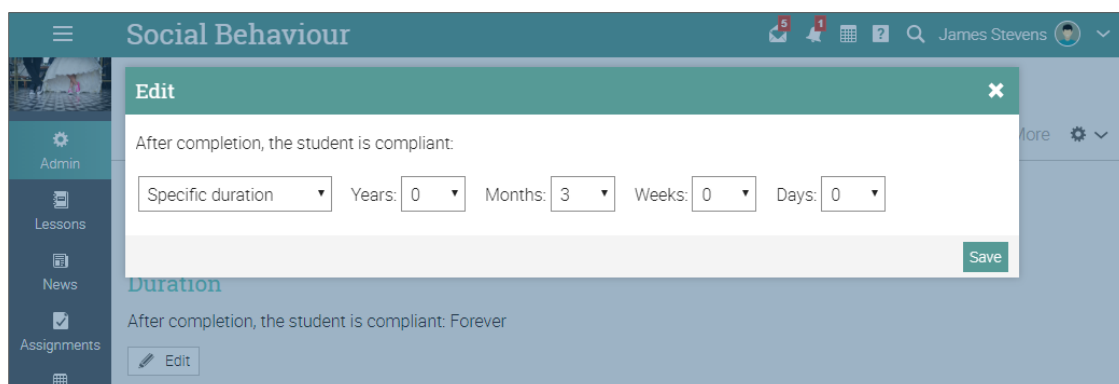
Configuring compliance

Compliance is a useful feature for schools that offer professional development programs for their teachers and wish to track teacher compliance. You can select classes that are required for compliance, then set up for how long the student is in compliance once they've completed the class and set up periodical renewal of compliance.

First, Compliance must be installed via the App center. Then visit the Admin/Configure area of a class and find the Compliance tab. Click the checkbox to make the class required for compliance:

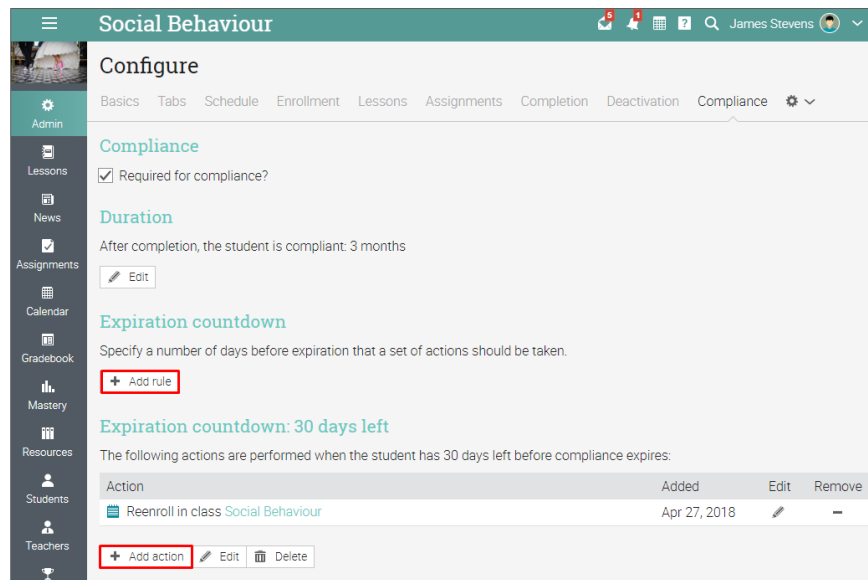


After enabling this option, when a student completes the class, they are deemed compliant for a specified period of time. By default, this period is "forever". To change the it, click on Edit. The following options are available: Forever, Specific duration, Until a specific date, and For date period. For example, if you want compliance to be available for 3 months choose a specific duration:



Getting started guide for Administrators

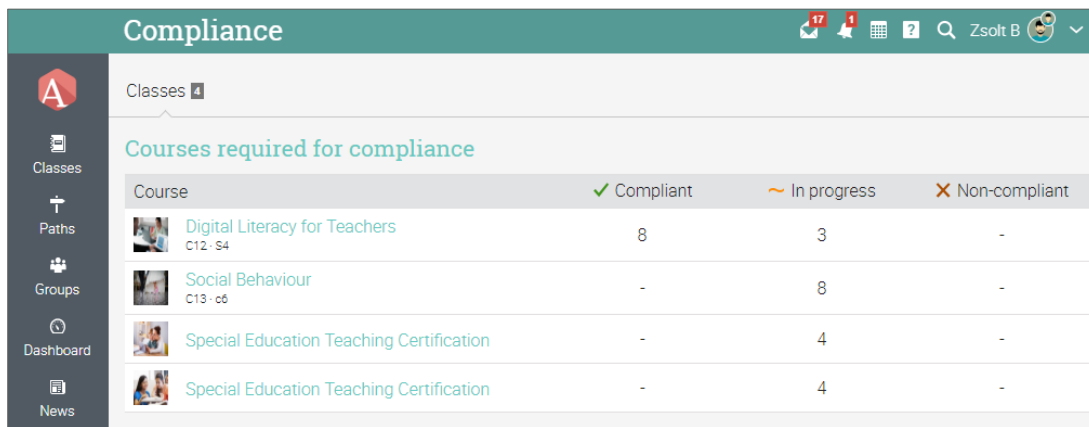
You can then add rules that specify what happens before compliance expires. For example, you might choose to start the countdown 30 days before expiration and choose to reenroll the students in the class:



The screenshot shows the 'Social Behaviour' class configuration page. The 'Compliance' tab is active. The 'Required for compliance?' checkbox is checked. The 'Duration' is set to 3 months. The 'Expiration countdown' is set to 30 days left. A table lists actions to be taken when the student has 30 days left before compliance expires:

Action	Added	Edit	Remove
Reenroll in class Social Behaviour	Apr 27, 2018		

To see all the classes required for compliance, visit Compliance from the main left bar. Here you can see the number of students who are compliant, in progress or non-compliant for each class.

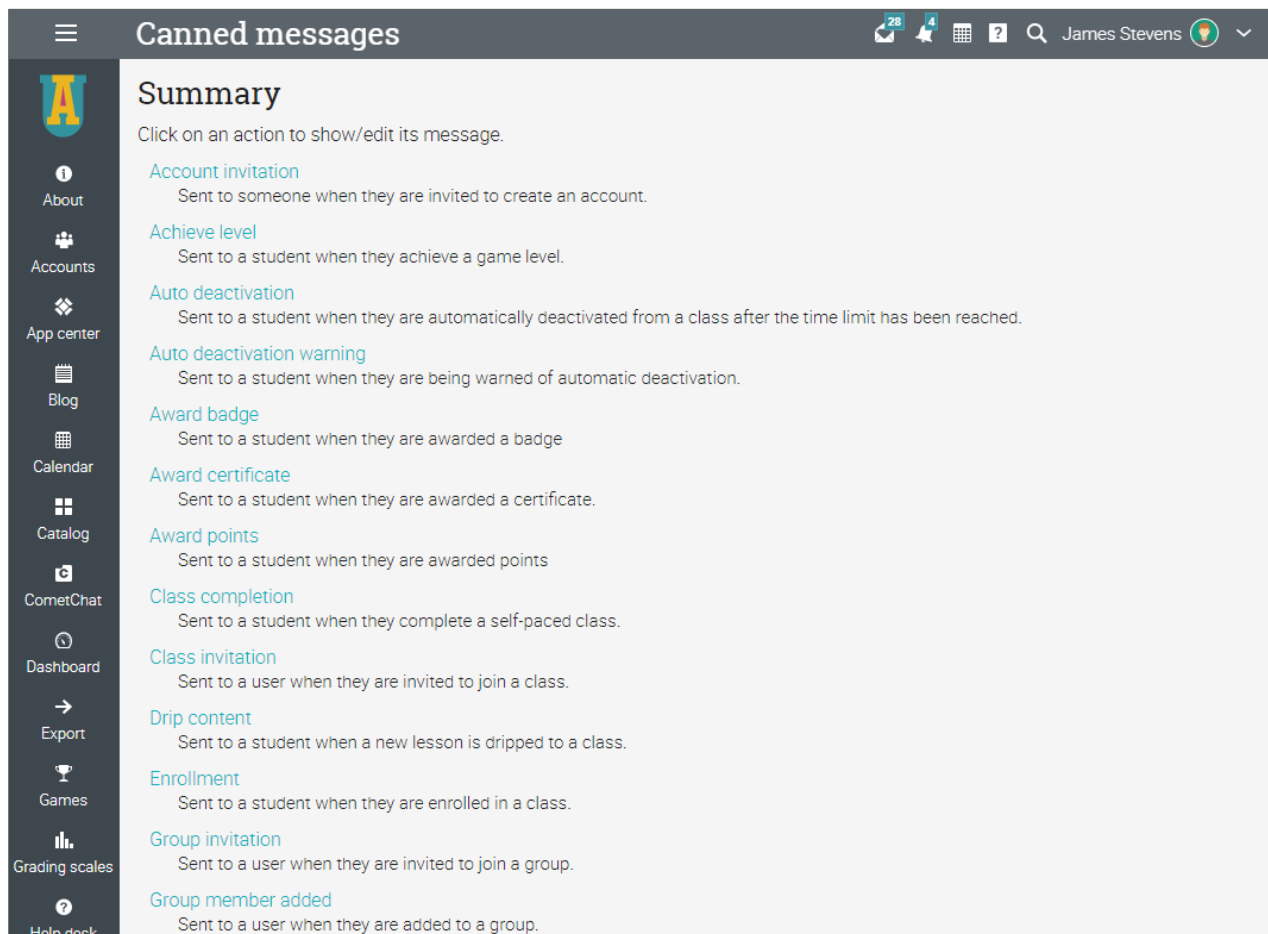


The screenshot shows the 'Compliance' page. The 'Classes' section is active. The table below shows the courses required for compliance:

Course	✓ Compliant	~ In progress	✗ Non-compliant
Digital Literacy for Teachers C12-S4	8	3	-
Social Behaviour C13-c6	-	8	-
Special Education Teaching Certification	-	4	-
Special Education Teaching Certification	-	4	-

Setting up canned messages

Many actions that users take in the platform such as enrollment, unenrollment and deactivation have associated messages that are sent to them. The content of these messages can be customized by going to Admin/Messages.

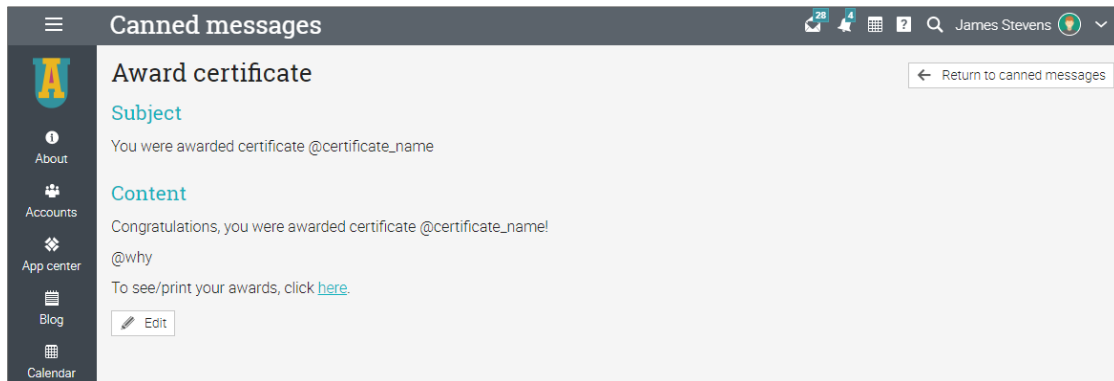


The screenshot displays the 'Canned messages' page. At the top, there is a navigation bar with a hamburger menu, the title 'Canned messages', and user information 'James Stevens'. A sidebar on the left contains various navigation options: About, Accounts, App center, Blog, Calendar, Catalog, CometChat, Dashboard, Export, Games, Grading scales, and Help desk. The main content area is titled 'Summary' and includes the instruction: 'Click on an action to show/edit its message.' Below this, a list of message types is shown, each with a brief description:

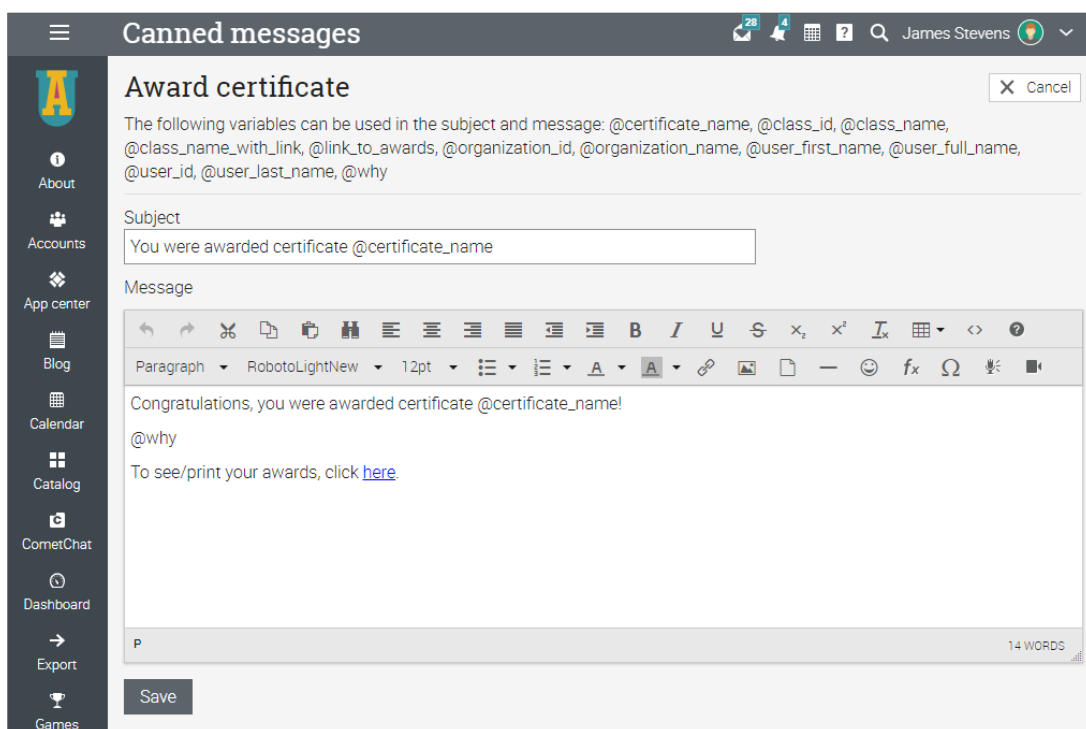
- Account invitation**: Sent to someone when they are invited to create an account.
- Achieve level**: Sent to a student when they achieve a game level.
- Auto deactivation**: Sent to a student when they are automatically deactivated from a class after the time limit has been reached.
- Auto deactivation warning**: Sent to a student when they are being warned of automatic deactivation.
- Award badge**: Sent to a student when they are awarded a badge.
- Award certificate**: Sent to a student when they are awarded a certificate.
- Award points**: Sent to a student when they are awarded points.
- Class completion**: Sent to a student when they complete a self-paced class.
- Class invitation**: Sent to a user when they are invited to join a class.
- Drip content**: Sent to a student when a new lesson is dripped to a class.
- Enrollment**: Sent to a student when they are enrolled in a class.
- Group invitation**: Sent to a user when they are invited to join a group.
- Group member added**: Sent to a user when they are added to a group.

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To change the canned message associated with an action, click on its Edit option, then enter the new subject and content.



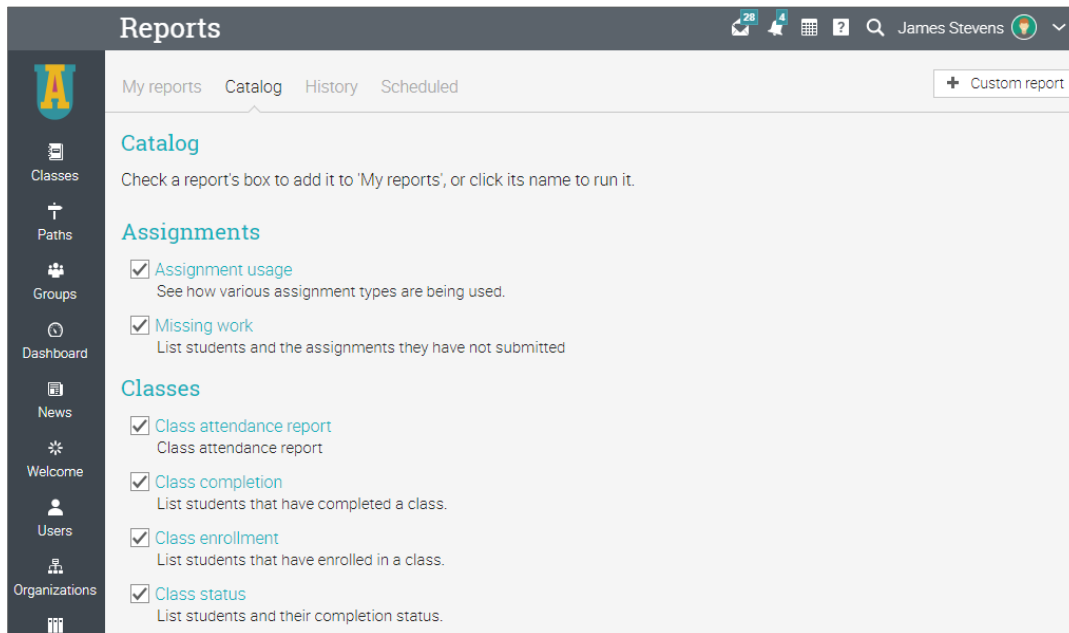
Each action has variables associated with it that can be inserted into the canned message using the "@" syntax.



Creating reports

You can create reports about many aspects of the platform such as system statistics, class completion and class enrollments. NEO also provides custom reports, which you can configure yourself.

Please note that this feature must be installed first via the App Center. Then go to the Reports menu in the left bar and click Catalog.



Here are some reports to get you started:

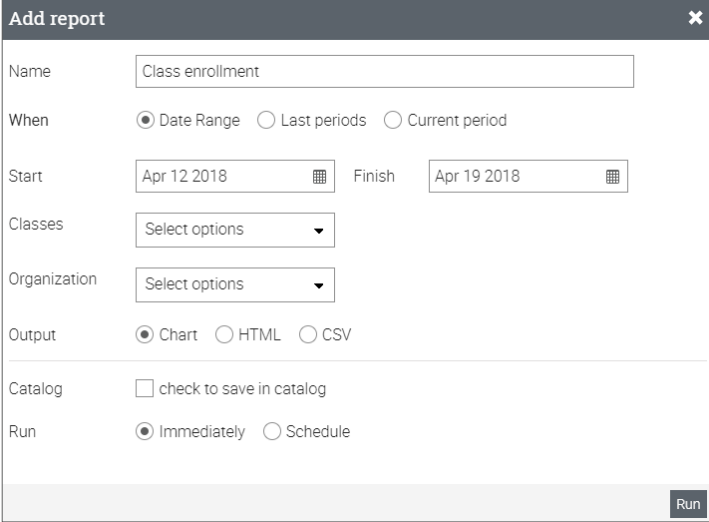
Site statistics

In this report, you will see statistics about the number of users, classes, enrollments, assignments, storage, and more. To generate the report, enter a name and click Run. When the report is done, you will get a notification. In the notification, you will have a link to the details of the report.

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Class enrollment

In the Class enrollments report you can see the enrollments for a class within a timeframe of your choice.



The screenshot shows a dialog box titled "Add report" with a close button (X) in the top right corner. The dialog contains the following fields and options:

- Name:** A text input field containing "Class enrollment".
- When:** Three radio buttons: "Date Range" (selected), "Last periods", and "Current period".
- Start:** A date input field containing "Apr 12 2018" with a calendar icon.
- Finish:** A date input field containing "Apr 19 2018" with a calendar icon.
- Classes:** A dropdown menu with "Select options" and a downward arrow.
- Organization:** A dropdown menu with "Select options" and a downward arrow.
- Output:** Three radio buttons: "Chart" (selected), "HTML", and "CSV".
- Catalog:** A checkbox labeled "check to save in catalog", which is currently unchecked.
- Run:** Two radio buttons: "Immediately" (selected) and "Schedule".

A "Run" button is located in the bottom right corner of the dialog box.

Class status

In the Class status report, you can see the enrollment status for the students of a class and the number of assignments that they have to do.

Class completion

In the Class completion report you can see the number of completions for a class in the period that you choose.

Assignment usage

In the Assignment usage report, you can see how teachers are using each type of assignment. Administrators can run the report on all teachers or on a specific teacher, and the totals for each assignment type are displayed at the bottom of the report.

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Missing work

In the Missing work report you can see the missing work of students from a class in the period that you choose.

Terms and conditions

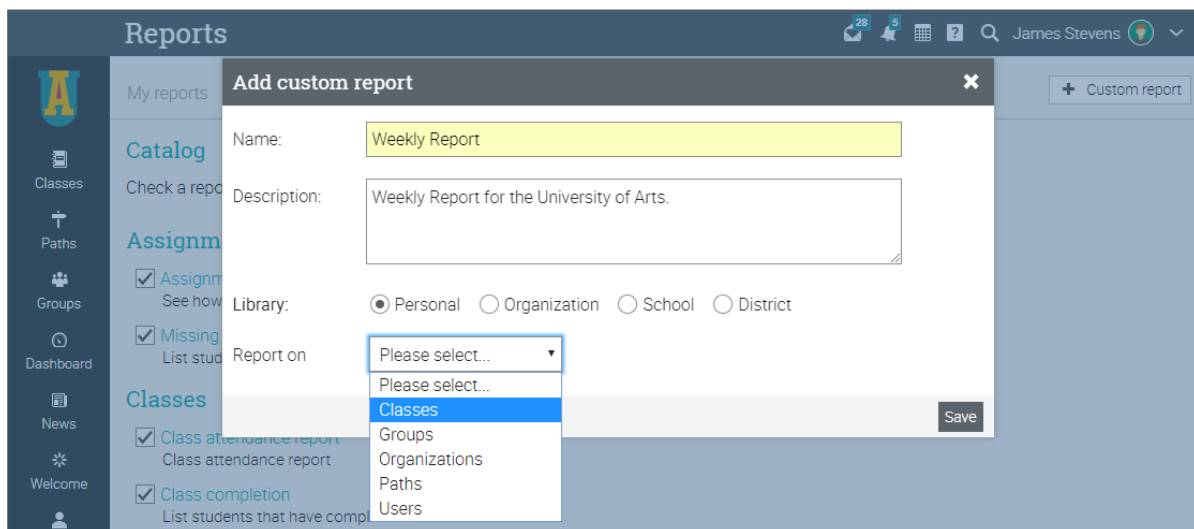
This report generates a list of users who have accepted the Terms and conditions of your portal.

Organization statistics

In the Organization statistics report you can see statistics about each organization you administer.

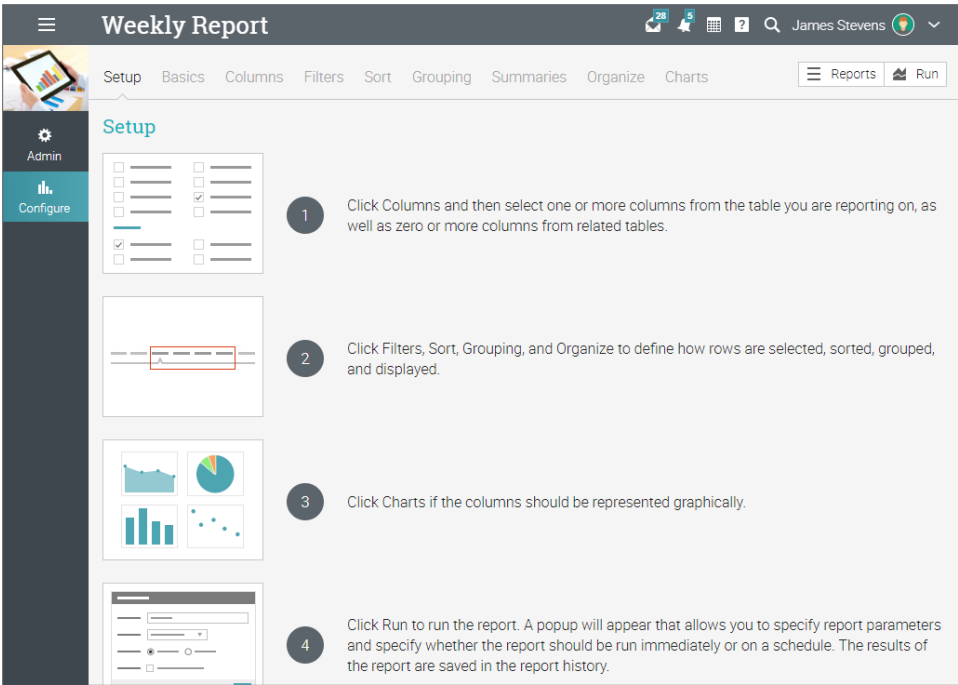
Custom reports

Custom reports allow you to select the data that they want to report on such as users, classes, paths, organizations, and more.

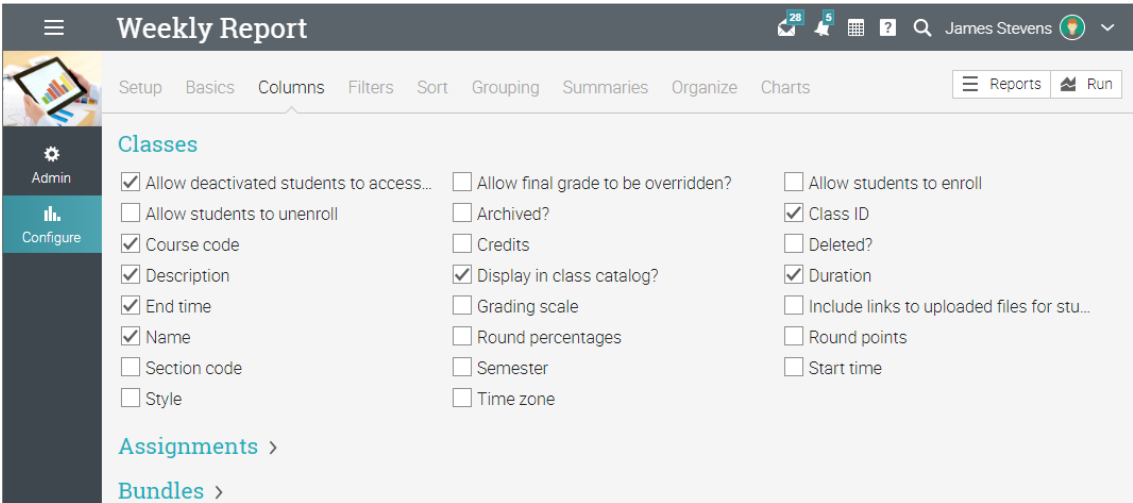


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You can also select a variety of fields, use filtering options, sort and group data by different parameters, and choose the chart output.



In the Columns tab, you can select which columns you want to report on, including your own custom account fields.



Upgrading to a premium plan

To purchase a premium plan, log in to your administrator account and click Admin/Plans. If you don't upgrade to a premium plan by the end of the 14-day trial of our Enterprise plan, you will be reverted by default to the non-expiring Free plan. The Free plan doesn't offer access to some of the premium features such as automation, ad-hoc reporting, customization options, technical support, and more.

To find out more about our pricing plans, please visit our website:

www.neolms.com/info/plans



Getting started guide for Administrators

Summary

The Getting started guide for Administrators provides the basic information that administrators need when they first start using NEO. Some of the topics we covered are: navigating in NEO, using the Help Center, customizing your site, creating accounts, setting up policies, configuring the class catalog and upgrading to a premium plan.

If you have any additional questions, please browse the Help Center or visit our support forum.

www.neolms.com

