Augusoft®

Lumens PRO Level 1 Program
Lumens Basics

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Level 1 Program Overview
Introduction

Welcome to Augusoft Lumens!

Some organizations have reported within 12 months (or less) that they have experienced an online self-registration rate increase of up to 50%!

The time-savings you will experience after implementing Lumens is measurable. Lumens will allow you to spend your time on less mundane tasks. Start thinking of what you are going to do with your extra time to help grow your program once your site is up and taking live registrations! Let's get started.

Let's take a moment to discuss the format of your workbook:

- This workbook contains screen captures of the Lumens software, which can be used as a reference tool during the learning process. Lumens has three web templates you can choose from to build your site, so you may see slight variances between the screen captures, however it's important to note that the screen navigation paths are the same.

- There are three workbooks providing training for Basic, Intermediate and Advanced Skills in Lumens.

- Each topic and subtopic is sorted based on the menu and submenus in Lumens. This workbook was designed to make it easy for you to follow along with trainings and to reference as you build your site.

The Lumens PRO Level 1 program is designed to provide the basic knowledge necessary to begin preparation and support of your production site.

Following this program is the Intermediate and Advanced Lumens programs. These programs will provide the basics for using a Lumens PRO license version. Additional sessions can be provided based on your organization's needs such as Room Management, Instructor Contracts, Accounts Receivable, and Reports.

Lumens PRO Level 1 will include basic training on the following topics:

- System Options
- Room Management
- Instructor Set Up
- Course Management
- Student Profiles
- Registration

Level 1 Program Overview
Introduction - Icons

There are several icons used in the manuals. Each icon has a visual value:

I Wish Lumens Could… Lumens thrives on user feedback to influence new features and updates – indicates an area where you may be able to think about what else Lumens can do for your program.

Information indicates informational items, things to consider as you set up your site, tips based on best practices or common practices of other Lumens customers.

Retention Activity indicates something to be done after or outside of the training.

Questions indicates questions for review and to frame thoughts about the way you will set up your site.

Ripple Effect indicates the importance of understanding the information, as well as how it impacts other areas that may well be downstream or dependent on the setup

Try it! is a suggested place in your training to stop and practice what you are learning.

Additional Reference indicates a process not formally addressed in the workbook. Additional resources will be indicated, such as a QRA (Quick Reference Aid or resource indicated, outside this training).

Knowledge Check is at the end of a section, designed to review content.

Over the course of your training program, you will create multiple user names and passwords, as you explore various user roles in the system. Please keep track of them on this page (you can pull this from your manual and place in the front or other location that will help you during each session).

Staff Staging Profile

User Name _____

Password _____

Student Staging Profile

User Name _____

Password _____

Instructor Staging Profile

User Name _____

Password _____

Company Staging Profile

User Name _____

Password _____

Staging Site web address

_____.augusoft.net

Production Site web address

_____.augusoft.net

Level 1 Program Overview
Background

Lumens is an enrollment management system. It was designed to ease the process of managing Student registrations and to provide a streamlined approach to registrations and report documentation.

From this Workbook, you will learn the basics of Lumens using a variety of learning methods including hands on activities, reviews, discussions, and knowledge checks.

The Lumens PRO Level 1 (Basics) program is expected to be completed in approximately 4 hours. This program can be run in one session or broken up into multiple sessions.

Credit Cards

Lumens uses various credit card gateways. While, training mock credit card information is used.

Visa 4111 1111 1111 1111   Exp. 12/2025   NO CVV Needed
Mastercard 5111 1111 1111 1111   Exp. 12/2025   NO CVV Needed

List the class below that you registered for:
_____

What did you like about completing the registration process?
_____

Is there anything you would change?
_____

Level 1 Program Overview
Overview of Lumens

These are some of the views available to <u>all</u> visitors of your Lumens website. The Admin Menu will vary based on user role set up but will only be viewable by <u>Staff</u>.

Objectives for Basic System Options:
- Discuss the System Preferences
- Review and discuss the Financial Policies settings
- Create a term in the Instructional Calendar

This section of the workbook focuses on the initial steps necessary to begin using your Lumens site. Our training program is a series of building blocks to develop the site, then populate the site, and prepare your site for use by your Staff and Learners alike.

Below is a diagram of the site development process, also the content of this workbook:

Build System Base	Build Locations and Instructors	Build Courses & Classes
Configurations	Locations & Rooms	Catalogs
Financial Policies	Instructors	Categories
Instruction Calendar		Subcategories
		Courses
		Classes

iPRO PRO CLTV STND
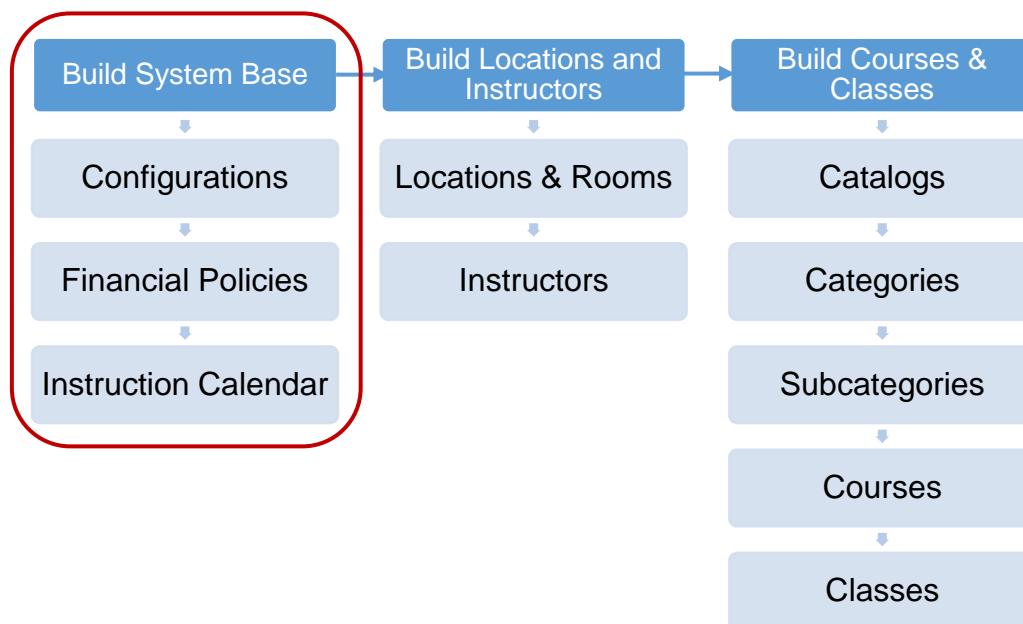
*System Options > **System Preferences***
This section provides your organization's location information.
All fields noted with an asterisk (*) indicate required fields.

Privacy Data Masking: These are fields you may choose to mask (make non-viewable) to Staff.

"Bad Weather" phrase: Where a Student should look for school closings, such as a phone number, recording, local radio / TV stations, social media, etc. It has a 255-character allowance.

Meta Tag Keywords: Are used for search engine optimization and apply to searches in sites like Google and Yahoo.

Mailboxes: Email addresses are defined here, used in sending and receiving email for multiple communications.
Many fields from this section will appear on emails and webpages in Lumens.

Site Title: Set in the *System Preferences* (example from Google Chrome).
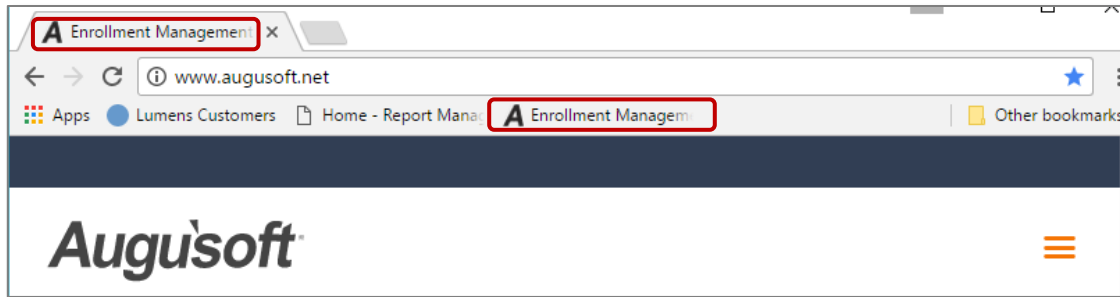
Retention Activity:

Discuss what the appropriate information should be on this screen.

- Assign one individual from your organization update to section #1:
  _____

- Decide on the information to be added for sections #2 & #3.
- Update your Staging Site to ensure you see its effects before adding to Production.

Basic System Options
Financial Policies

For reporting purposes, at what level do you need to summarize money taken in (payments) versus money going out (refunds)? You have control of the depth of what you want to track in course / class creation.

System Options > ***Financial Policies***

You may need to use separate accounting codes for these fees. (i.e., lab fee, book fee, program fee, etc. These fees are configured with your organization before you start building your production site). You may need to consult with the department at your organization that handles finance to make sure you are capturing everything necessary for reporting purposes.

You may turn on or off the use of Accounting Codes and where you want these fields to display at specific levels. Staff may also indicate whether an Accounting Code is required by selecting the appropriate box.

Decide whether you want to use Accounting Codes for selected fees.

If you add your organizations' Tax ID, it will display on all transaction receipts produced by Lumens.

You may create and download an MS Excel or comma delimited file for your A/R or QuickBooks® system. If you do not use QuickBooks, you may disregard.

▼ Accounts Receivable / Quickbooks Accounts

The next entries are required to use the QuickBooks extract file or other Accounts Receivable tracking.

For Quickbooks users, To record a journal entry for a sale on account, one must debit a receivable and credit a revenue account. When the customer pays off their accounts, one debits cash and credits the receivable in the journal entry.

These entries must match account names as shown on your QuickBooks chart of accounts.

Debit account for receivables

Credit revenue account for receivable

Debit cash account for receivables payments

Ripple Effect:
How your organization decides to use Accounting Codes affects options within reporting and accounting fields that display in a variety of locations, including courses and classes.

Retention Activity:
Review the accounting needs for your organization. Determine how / if you want to track revenue with accounting codes. If you are not sure, meet with your finance team prior to building your production site. Practice in your Staging site to ensure you see the effects of using these codes.

*System Options > **Instructional Calendar***

Add a new term or edit an existing term. Your class display date must be equal to or before registration dates.

Term Code: This code may be up to 8 characters. Term Name is up to 25 characters

Earliest Class Start Date and **Latest Class Start Date**: The first and last dates a class can start (class does not have to end in term).

Display Starts/Ends on: The first date and last date a class assigned to a term will *display* on your website.

Public/Staff Registration Begins: These are the dates in the term Learners and Staff can *register* for classes (do not have to be same).

Early bird discount ends: This is the last date a Student can get a discount for early registration.

Age as of Year: This discount is used as example for children or seniors. Apply if offering discounts to Learners are *under or over* a certain age.

Number of Catalogs Distributed and **Marketing Costs**: If Class Performance feature is active but not using paper/mailed catalogs, enter *1*.

Report Membership Purchases in Term: If you wish to track these sales by term choose "Yes" (Revenue Report). If using, refer to your implementation specialist on effect of overlapping terms.

OCP Active: Selecting *Yes* enables the auto-import feature for activated online courses.

In this example, when a class is assigned to a term:

Term code *	YR2017
Term name *	Year Round 2017
Earliest Class Start Date *	1/1/2017
Latest Class Start Date *	12/31/2017
Public Display starts on *	12/01/2016 12:00 AM
Public Registration Begins *	12/01/2016 12:00 AM
Public Display ends on *	12/31/2017 12:00 AM
Staff Display starts on *	12/01/2016 12:00 AM
Staff Registration Begins *	12/01/2016 12:00 AM
Staff Display ends on *	12/31/2017 12:00 AM
Early bird discount ends on	mm/dd/yyyy hh:mm am/pm
Age As of Year *	2017
Number of Catalogs Distributed *	1000
Report Membership Purchases in Term *	○ Yes ● No
OCP Active ?	○ Yes ● No OCP auto update imports classes to this term.

Submit Cancel

Earliest Class Start Date: The class must start between 1/1/2017 and 12/31/2017 (The class can end at any time)

Public Display starts on: The class may be set to display to Students as early as 12/1/2016 to 12/31/2017.

• Display dates are editable at the class level if necessary.

• A class must have a display date equal to or before <u>any</u> registration dates.

• Student registration is available as early as 12/1/2016 but can be adjusted.

Staff Registration Begins: Staff can register a Student as early as 12/1/2016. Default time is editable.

<u>Ripple Effect</u>:
Term dates directly affect the dates you can assign within a class. Classes assigned within a term must <u>start</u> within the term dates. Registration start dates and display dates carry over to classes assigned to the term.

Sample of instructional calendar view:

Instruction Calendar
You cannot delete terms that have classes associated with them.

Add

Select	Term name	Status	Earliest Class start date Latest Class start date
	Fall2017	Active	01/01/2017 12/31/2017
Edit Inactivate Change Status	World Education	Active	01/01/2015 01/01/2020
	1Jul2017 - 31Dec2017	Future	07/01/2017 12/31/2017
○	Fall 2018	Future	07/01/2017 12/31/2017
○	Summer workouts	Future	05/22/2017 06/01/2017
○	Fall 2016	Expired	09/12/2016 12/09/2016

In the radio dial select column
- Terms can be edited and inactivated.
- Terms can be deleted, if no classes have been assigned to them.

Term status column
- **Active:** If class start and end dates encompass the current date.
- **Future:** If class start and end dates have yet to occur.
- **Expired:** Once the latest class start date has passed (new classes cannot be assigned to an expired term).

Questions:
How does your organization set up terms?

What might you need to keep in mind when developing your terms?

Try It!:
Have one person create two terms. Create one term that is good for the year (classes will be assigned to this term, to ensure they are viewable during training). The other term should be similar to a term currently used in your organization. What Term name and Term code was used? List the dates given: display dates, start dates, registration dates.

Basic Financial Management
Accounting Codes

Objectives for Basic Financial Management:

- Discuss what accounting codes you may wish to use in Lumens

This section of the workbook focuses on the initial steps necessary to decide where and what account codes will display in Lumens and defining which will be available where. This will drive which accounting codes will be available when creating courses, classes, etc.

Accounting Codes

If your decision to use Accounting Codes has been confirmed, you will then need to input your accounting codes into Lumens. You access the Accounting Code Management Screen below. If you consulted with your organizations' financial office on whether or which codes to use, you may want to refer to that authority again for the codes themselves.

*Menu > Financial Mgmt > **Accounting Codes***

Accounting codes

Accounting Code	
Available for	Categories / Classes / Courses / Misc. Charges / Misc. Credits
Status	▾

Search   Reset

Add

Select	Accounting code	Status	Available For
○	1414	Active	Classes
○	4141	Active	Multiple
○	123-456-1111	Active	Multiple
○	123-456-2222	Active	Multiple

Additional Reference:
For detailed step-by-step guidance on how to use Accounting Codes in Lumens, please go to: *Customer Support > Document Center > Quick Reference Library > **Accounting Code Management.***

Basic Room Management
Program Overview

Objectives for Basic Room Management:
- Add locations to your Lumens site
- Create basic room features
- Add rooms to your locations in Lumens

This section of the workbook will focus on the basic development of locations (buildings). Since each class must be assigned to a location, (you can use a TBD location), your locations must be added to your site before you can create a class.

Room Management has various utilities (if you choose to use the functionality), and we will discuss those features in future Lumens training sessions. Your license package dictates whether you will have *Locations* or *Locations* and *Rooms*.
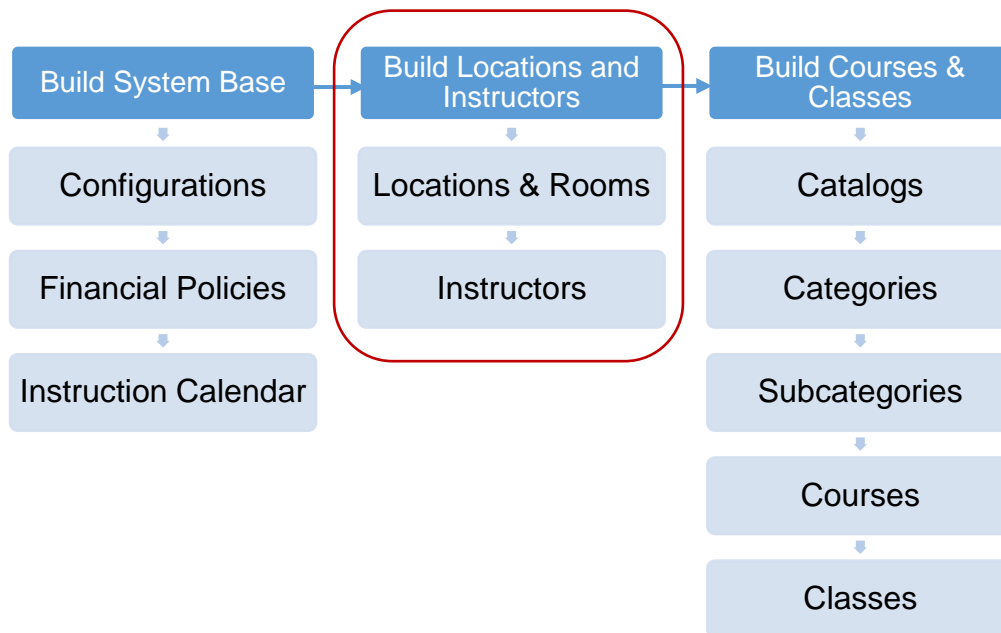
Build System Base	Build Locations and Instructors	Build Courses & Classes
Configurations	Locations & Rooms	Catalogs
Financial Policies	Instructors	Categories
Instruction Calendar		Subcategories
		Courses
		Classes

*Menu > Room Management > **Locations** or Menu > Course Management > **Locations***

All fields noted with an * in Lumens are required fields.

Use location names all Staff are familiar with.

A graphic can be added to the location, viewable by Guest and Learners. Image max size is 50KB.

If *Room Management* is active and *Contact Email* entered, Lumens automatically sends *Room Reservation Request* (email template), if activated, to this person on associated room.

Enter directions to location, can be viewed and / or printed by leaners. Often included in *Class Confirmation* (email template).

Information:
To ensure the location is plotted on the *Maps* feature, enter the actual street address on *Address Line 1*. Do not use suite, bldg., etc. on this line.

A location can be edited. Click *Edit* to access the location view.

Locations

Search using location name		City	
State		Zip	
Contact Person		Contact Email	
Phone		Location Status	

Search

Use any part of the location name to search.
For a complete location listing, clear the search field, then press Search.

Select	Location	Status
Add		
▼	GoToMeeting Online	Active
Edit		
Delete		

- **Inactivate/Activate a location:** If a location is no longer in use, it can be inactivated. A warning message appears to ensure this is your intention. The location moves to the inactive view (end of the list). Note that the location may be reactivated if necessary.
- **Delete:** A room can be deleted only if there are no classes assigned to the room.
- **Rooms:** A Location can have rooms assigned to it (when using the Room Mgmt feature).

Ripple Effect:
Locations must be assigned to a class (TBD locations can be created) however rooms can also be assigned later. If room management is <u>off</u>, you can enter the room name or number in a text field when creating a class. In this case, the *Room Management* menu option will not be available. Locations will be found under the *Course Mgmt* menu.

Try it!
Create a location:

- Each individual will create a location.
- Keep the email address as your own.
- You can create generic directions for the staging site.

Questions:
How difficult / easy was the process? _____
What information will you want available when adding locations to your Production site? _____

Basic Room Management

Rooms

Before you create a room, Lumens has an option called *Room Feature.* This option allows you to add unique characteristics about a room that may help you determine if the room is suitable for a class.

You may have rooms that are actual labs (e.g. medical labs), or rooms with computers, web conferencing functionality, specific software, cement floors, etc.

Room Management > **Room Feature**

Room Features

Feature name	Status	Action
		Add
No features are defined.		

Add a room feature

Feature name _____

Feature description [   ]

Submit

Try It!:

Create a feature:

- Each individual will create a different feature. (e.g. Overhead projector, Instructor computer station, Theatre Seating, Kitchen Facilities, etc.)
- Keep the description simple.

Questions:

What types of features will your rooms have?

_____

Will you use the Room Management feature? _____

*Room Mgmt > Locations > **Rooms** (next to the location name)*

When you create a class, you can choose a location and a room. Room schedules can be managed within Lumens. The *Automatically Generate Email Reservation Request* feature, when selected, will send an email to the contact entered when a room or location is requested.

*Room Mgmt > Locations > **Rooms** (next to the location name)*

Rooms - Abbe Center for Community Care

Select	Room Name	Room Capacity	Status
Add			
○	Classroom	40	Active
	Classroom 2	20	Active

Edit
Delete
View Blocks
Combine

Back

Once a room is created, the rooms can be edited. Besides the choice to edit, there are other available options for rooms.

- **Delete**: This option is only available if no classes have been assigned to a room
- **Inactivate**: If a room has been assigned to a class, the option to inactivate is enabled. This will remove the room for assignment in future classes.
- **Blocks:** Time blocks can be added to indicate intervals of time a room is not available for class assignment.
- **Combine**: This becomes available if two or more rooms exist. It allows the organization to use a room that has dual spaces that can be assigned separately or together.
- You must create a combined room record in Lumens linking two existing Colleague rooms and assign this combined room record to the class schedule. We are then simply duplicating every class meeting record for both rooms.

Try It!:

Create a room:

- Create two rooms in the location you created earlier.
- Name the room anything you choose.
- Add at least one feature to the room.

Questions:

Think about your locations. Are there rooms you want to schedule through Lumens?
_____

Would you find this beneficial? _____

Objectives for Basic Instructors:
- Add an Instructor profile
- Review Job Titles for Lumens
- Discuss Education Level and Company Type details in Lumens.

This section of the workbook focuses on the design and development of Instructor profiles for your site. Additional features apply to the Instructors including payment tracking (if you choose to use the feature). We will discuss this in more detail later in Lumens training.

Instructor > ***Instructor Profiles***

Instructors

Last Name		**First Name**	
Lumens Instructor ID		**City**	
State		**Zip**	
Phone Number		**Email**	
Instructor Status	Active		

Search   Reset

To restore a complete instructor listing, press Reset; then press Search.

Showing records 1 through 10 of 11.

Name	Status		Action
			Add

- To be consistent, we recommend that you create a naming convention for Instructor usernames and passwords. <u>Remember, usernames must be unique throughout your Lumens website.</u>

- Creating a TBD Instructor allows your organization to create a class even if you're unsure who will teach. You can update this later when you determine the Instructor.

- An Instructor cannot create his or her own profile. Only Staff may create Instructor profiles.

- Instructors <u>cannot</u> edit their picture, bio, or accessibility (i.e. accessibility rights such as ability to update grades and / or attendance). Only Staff can update these options.

- Instructors can have multiple biographies. Once the first biography is added, save the Instructor. Then edit the profile and add the additional bios. A single biography displays to the public with the class your Instructor has been assigned to.

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Username: minimum 6, maximum 255 characters

Username*

Password: minimum 8, maximum 255 characters

Password* _____ Strength

Re-enter password*

Identity Verification Question [None specified ▾]

Identity Verification Answer

Password hint*

First name*

Middle initial

Last name*

Alternate name

Employer

Company type [None specified ▾]

FICE Code

Job title [None Specified ▾]

Instructor ID

line 1 > Address*

line 2 > Address

City*

State [Virginia ▾]

Zip*

Zip+4

Phone* [None specified ▾] **Ext**
999-999-9999

Additional phones [None specified ▾] **Ext**
999-999-9999
[None specified ▾] **Ext**
999-999-9999
[None specified ▾] **Ext**
999-999-9999

E-mail

Add instructor photo (file 50K or less) [Browse...]

Bio Name* **Bio Details***

[Spell Check]

Make public [None ▾]

Allow Email to Students? ⦿ Yes ○ No

Allow Instructor to Enter Grades? ○ Yes ○ No

Days after class end grades can be recorded by Instructor
(leaving blank means Instructor cannot record grades)

Allow Instructor to Record Attendance? ○ Yes ○ No

Birth date
m/d/yyyy

Educational level [None specified ▾]

Gender ○ Female ○ Male

Internal comments

MyVCCS Email
Used for MyVCCS and Blackboard

[Submit]

Alternate Name: Optional; if used, this is the name that displays online and included in Learner Confirmation (email template).

FICE Code: Optional; federal code for specific college or university.

Instructor ID: Optional; if the Instructor has an ID from another system it can be used to link data from the two systems.

Email: Required _if_ you allow Instructors to email their Students.

Instructor Photo: Accommodates a maximum size of 50kb.

Bio Name and **Bio Details** are required; 500 characters maximum.

Make Public: Select which data elements (phone, email, or both) to include in the Learner Confirmation (email template); Data does not display online, Instructors with access can edit this field.

Allow Email to Students: Staff can disable this on an individual basis, while still allowing other Instructors email functionality (Instructors do not see this field).

To edit an Instructor, *Instructors > Instructor Profiles > **Edit***

Instructors

Last Name		First Name	
Lumens Instructor ID		City	
State		Zip	
Phone Number		Email	
Instructor Status	Active ▼		

	Instructor Name	Instructor Status
Add		
▼	Alvarado, Anin 📷	Active

Edit
Inactivate
Profile Notice

Active Instructors are editable. Click *Edit* and Instructor profile view displays.

Inactivate/Activate an Instructor: If an Instructor is no longer teaching for your organization, his / her profile can be inactivated. A warning message appears to confirm your request. Once completed, the Instructor's status changes to inactive. He / she can be reactivated if needed. Inactive Instructor profiles are not available to be assigned to classes.

Delete: An Instructor profile can only be deleted if he / she has <u>never</u> been assigned to teach a class.

Profile Notice: This allows you to view, print, and / or email the Instructor his / her password and user name.

Earnings & Payments: *This is an optional feature in Lumens and is only viewable if active. Earnings & Payments are reviewed at a later point in training.*

Try It!:
Create an Instructor:

- Create an Instructor (only one).
- Each participant should use his or her own name for practice purposes (try this format – 'Your First Name' Instructor – e.g. John Instructor).
- Make sure the username is unique, you may want to discuss a common style.
- Add a picture if you have one available.

Questions:
Do you have pictures you want to upload? _____
What about biographies? _____
      Imports are also available if needed.

Basic Instructors

Job Titles, Education Levels, and Company Types

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Job Titles, Education Levels, and Company Types can be edited and inactivated. The items can be deleted only if they have not been associated with an Instructor or Staff member profile.

*Instructors > **Instructor Job Titles***

Job Titles
You cannot delete or inactivate the default job title or delete job titles that are in use.

Job Title	Status	Action
		Add

Instructor is the default title. Job titles are also selectable within Staff profiles.

*Instructors > **Education Levels***

Educational Levels
You cannot delete or inactivate the default value or delete values that are in use.

Educational Level	Status	Sort Order	Action
			Add
None specified	Active	999	Edit

None specified is the default. Education levels are also selectable within Staff profiles.

*Instructors > **Company Types***

Company Types
You cannot delete or inactivate the default company type or delete company types that are in use.

Company Type	Status	Action
		Add
None specified	Active	Edit

None specified is the default.

You may want to add specialization or industry for Instructor experience or Staff awareness. Examples: Education, Health Care, High Tech, Legal, Manufacturing, Non-Profit, Science, Social Services, etc.

Each item added creates a drop-down list of options. These options become available in the Instructor profile creation. In addition, these same lists are available when a Power User is creating a Staff profile.

Retention Activity:
Create a list of Job Titles, Education Level, and Company Types you may want to use for Instructor profiles and / or for Staff profiles.

Objectives for Basic Course Management:

- Create Categories and Subcategories in your Lumens site
- Develop a Course
- Add a Class within your Course
- Discuss Catalogs in Lumens

This section of the workbook focuses on the development of your organization's class offerings. The first step is to access Course Management and create your categories and subcategories (create a catalog first if you choose to use). There is more to learn about Courses and Classes as we progress through training.

iPRO PRO CLTV
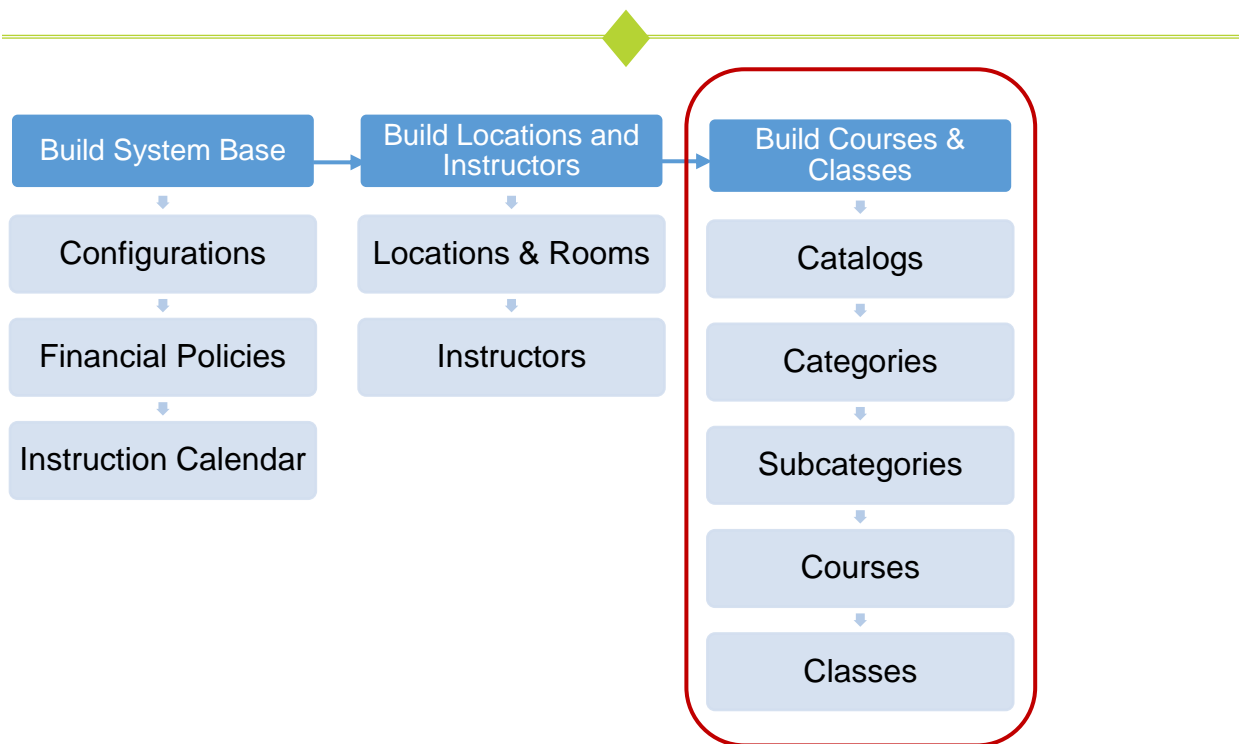
*Course Management > **Catalogs***

You may modify the default name label Catalog to your own term.
(e.g.: Programs, Schedules, Locations, etc.…)

The Catalog feature in Lumens, is designed to allow you to segment / market your course offerings by location, delivery method, day of week or groups of people (i.e. Adult Education, Kids College, Leisure Learning, etc.)

- If this feature is activated, up to 7 catalogs are available based on your Lumens license.
- If you choose to use online programs, (i.e. Pro Train, Pearson, World Ed, and UGotClass, etc.) those classes can be set up in separate catalogs without affecting your total allotment.
- To add another catalog when all are in use, you must inactivate or delete one of the existing (active) catalogs. (Discuss with your implementation manager the number of catalogs you may need).
- The *Add* link will display only when you have the option of adding a catalog.
- Catalogs can only be deleted if no courses or classes have been assigned to it.
- Catalogs can only be inactivated if there are no active classes assigned to it.
- Once a catalog has been inactivated, it <u>cannot</u> be reactivated.
- You cannot delete or inactivate catalogs that have active classes. Also, for reporting purposes, you cannot delete catalogs that have classes that have run or have been cancelled. You can only inactivate such catalogs.

You can hide a catalog from view if you wish to only use that catalog as an internal segmentation tool. Catalogs are not required to be part of your print catalog options. This is also an option in your catalog view.

Action		Catalog Name	Available for Mailed Catalog Request?	Hide from Menu?	Catalog ID/ Status
You have reached the maximum number of catalogs for which you are licensed. If you wish to add more catalogs, please contact customer support.					
Action ▼	▲ ▼	Career Training	☑	☐	1 Active
Action ▼	▲ ▼	Professional	☑	☐	2 Active
Action ▼	▲ ▼	Online Courses	☑	☐	3 Active

☑ Enable "All Catalogs" option?

Save Catalog Information

If you are using the *Send Me A Catalog* feature, remember that someone on your Staff must manually send an e-book or physical catalog out to the requestor.

Free Course Catalog by Mail

Thank you for your interest in our program. Please fill out the form below to receive your free catalog.

* denotes required information.

Catalog to request*

Career Training
Professional
Online Courses

To select multiple catalogs, press and hold the 'Ctrl' key
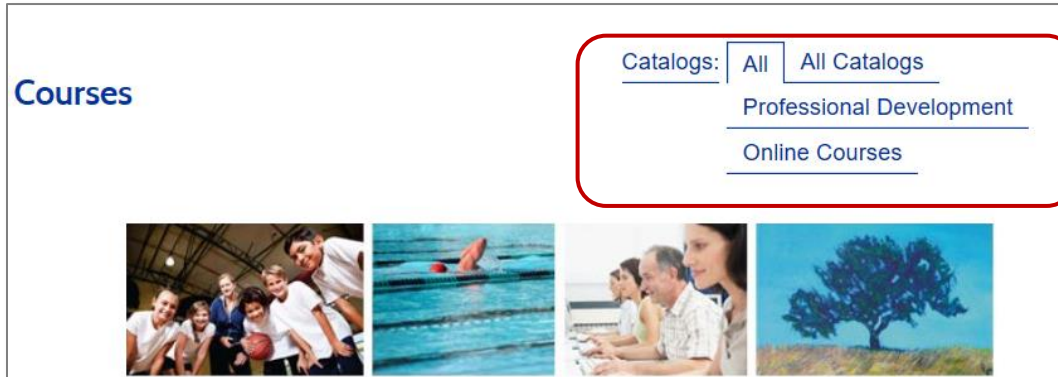
First name*

Middle initial

You will learn more on this feature in a separate workbook under the topic: Catalog Requestors

When multiple catalogs are used, you can choose to have your site configured to have a view of each individual catalog on your courses page.

Additionally, (or as an alternative) you can create a graphic for each catalog and attach a link to the graphic that will open each catalog view for the Learner. These graphics can be placed in multiple locations.
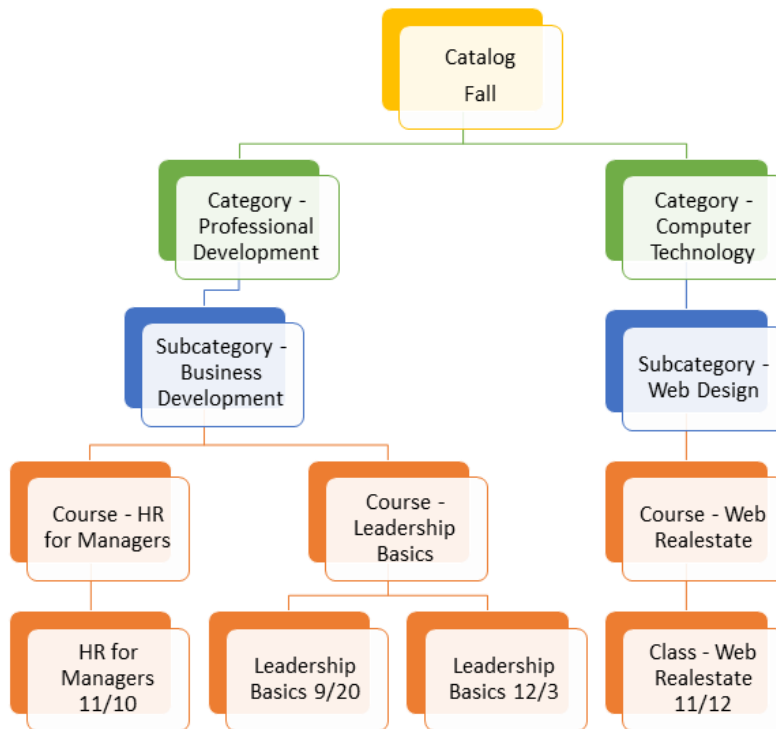
The following diagram demonstrates the basic structure needed to ensure a class is successfully added to your site.

In Lumens, a class is built from a course; a course is linked to a subcategory, which resides below a category. Consequently, you must build the hierarchy structure in the appropriate order.

In the next sections we will discuss how to build:

- **Categories:** The way in which your categories will display is dependent on the site template of your choice (Pepin, Nokomis, Minnetonka). (we recommend no more than eight)
- **Subcategories:** Display on the courses page by its Category and helps Learners narrow their search.
- **Courses**: A course defines the topic for classes and resides beneath subcategories but does not display to Students. Courses can be thought of as a shell and is used for the creation of classes in Lumens.
- **Class:** This is specifically what is offered to the Learner. The class is an individual instance of a course that includes an assigned Instructor, location, start and end dates, and meeting times.

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*Course Management > **Categories***

If you elected to use *Accounting Codes* at the category level, you add them here. The refund policy listed at this level becomes the default for this category / subcategory. The *Description* for the Category is required, but only viewable to Staff. Certain characters can be read as HTML by a browser so please do not use characters such as: #, &, @ in any of the description fields. This can cause complications in your site.

Sort order: changes the display from alpha order to the numeric order assigned. (e.g.; if sort order remains 100, those categories will display in alpha order from left to right on the courses page. If a certain order is needed, assign a numeric order of 100, 200, 300, (or some variation) etc.)

Email Confirmations: *Yes,* is the default. When set to *No,* the following automated emails will <u>not</u> be sent: Learner Confirmation, Class Confirmation, Transfer Confirmation, and Student Reminder.

<u>Ripple Effect:</u>
If a Refund Policy is changed at the category level, it filters all the way down to the class level as the default. This can be changed at any level in between. The accounting codes display <u>if</u> you chose the category level within *Financial Policies* page.

<u>Questions:</u>
Do you anticipate using Accounting Codes at this level? _____
Discuss the categories that are effective for your organization. _____

Edit a Category: A category can be edited at any time. However, the changes are <u>immediate</u> and affect all courses and classes linked to the category, even classes from the past. For example, if you rename the category, classes display under the new category name, reports display the new category name, and the class details display the new category name.

Delete a Category: When you create a category, it can be deleted if no subcategories have been created under the category.

Inactivate a Category: You can inactivate a category if there are no active classes under the category and subcategory group.

This a quick audit search, results display changes made to the Category / Subcategory. Includes: change type, change date, change by, and change reason.

Check Report for Category/Subcategory Changes   Add New Category

Action	ID	Category	Sort Order	Status
Action ▾	4	Alternate Languages	100	Active
Action ▾	5	Business and Professional	100	Active
Action ▾	6	Career Advantage	100	Active
Action ▾	1	Career Training Program	100	Active

<u>Try It!</u>

Create a category:

- Each person creates a category for your site. (e.g. Business / Management, Health & Wellness, Computer / Technology, Language / Arts, etc.)
- Leave the standard refund policy as the default.
- Add a description of the types of classes you want in this category.
- For now, leave the accounting codes blank. (add later if accounting codes are used at this level)
- Leave the sort order at 100 (for this activity).

*Course Mgmt > Categories > Click on Category name > **Add Subcategories***

Accounting codes can also be assigned at this level but are not required.

The subcategory description displays to the public. This field accepts HTML code if you want the detail to display in a certain format.

The Base Course Number affects the auto-numbering feature. This number must be 2 or 3 digits (no alpha).

This number must be unique!

The default in Lumens is Automatic Course numbering, the system will generate a number based on order of creation. If you require the use of your own course numbers, *Manual Course Numbering* may be enabled. Sort order will still be applied to manual entries. *Manual Course Numbering* also accommodates alpha or numeric characters.

Try It!:

Create Subcategories:

- Each person creates two subcategories under the category you created.
- Leave the standard refund policy as the default and accounting codes blank (for now).
- Add a description.
- Add a base course number. (recommend consistency – e.g.; 100, 200, 300, 400, etc.)
- Leave the sort order at 100 (for this activity).

Basic Course Management

Categories / Subcategories - Continued

Subcategories - Before & After School Programs

Show ALL subcategories (regardless of category)   Add Subcategory

Action	ID	Subcategory	Sort Order	Base Course Number	Status
Action ▾	83	Cheerleading	100	200	Active
Action ▾	84	Dance Team	100	300	Active
Action ▾	85	Football	100	400	Active
Action ▾	91	Soccer	100	600	Active
Action ▾	86	Swimming	100	500	Active

Back to categories

Show all Subcategories link will allow you to see a list of all categories, subcategories, and <u>all</u> base course numbers on one page. (This is useful when building your production site to eliminate using duplicate base course numbers and avoid the warning message!)

Subcategories

Action	ID	Subcategory	Sort Order	Base Course Number	Status
Action ▾	101	Academic Traveler:Day Trip	100	13	Active
Action ▾	1	Arts:Crafts	100	11	Active
Action ▾	2	Arts:Culinary	100	12	Active
Action ▾	3	Arts:Music	100	14	Active
Action ▾	83	Before & After School Programs:Cheerleading	100	200	Active
Action ▾	84	Before & After School Programs:Dance Team	100	300	Active
Action ▾	85	Before & After School Programs:Football	100	400	Active
Action ▾	91	Before & After School Programs:Soccer	100	600	Active
Action ▾	86	Before & After School Programs:Swimming	100	500	Active
Action ▾	99	Conferences:Activities	100	613	Active
Action ▾	94	Culinary Arts:Bar B Que	100	20	Active
Action ▾	95	Culinary Arts:International Cooking	100	30	Active
Action ▾	92	Culinary Arts:Kids Cook	100	100	Active
Action ▾	93	Culinary Arts:Pastry	100	10	Active
Action ▾	100	Hockey:Fundamentals	100	700	Active
Action ▾	90	Ohlone For Kids:All Locations	100	501	Active
Action ▾	89	Ohlone For Kids:Fremont Campus	100	401	Active
Action ▾	87	Ohlone For Kids:Newark Campus	100	201	Active
Action ▾	88	Ohlone For Kids:Newark Memorial High School	100	301	Active
Action ▾	35	Swimming :Swimming Ages 0-3	100	133	Active

Under the *Action* view:

Edit, Delete: Indicates there are <u>no</u> courses associated with this subcategory.

Edit, Inactivate: Indicates there are courses associated with the subcategory.

Edit: Indicates this has courses <u>and</u> active classes associated with this subcategory.

Once you have created Categories and Subcategories you can begin to create Courses. Courses are a shell used to create Classes. Classes are the actual event and are scheduled with an Instructor and registered for by the Learner.

Category   *Subcategory*   *Course/Class*

Courses

This is the Courses Page Header Template.

Catalogs: All | Online

Professional

Business & Industry

Management

Cooking

Gardening

An Overview of Project Management

Project management is the planning, organizing, directing, and controlling of company resources in the short-term with the purpose of comple... View More

3400003 **Start date:** 01/03/18 Weekly - Wed 10:00 AM - 12:00 PM (1/3/2018-12/26/2018) 10 Seats Left

52 sessions. Days of the Week : Weekly - Wed . **Tuition:** $150.00 Instructor : Test Instructor1

Add to Cart »

View Details »

*Course Management > **Course/Classes***

Once you have created Categories and Subcategories you can begin to create Courses.

Course Management

You cannot delete or inactivate courses that have active classes or that are part of an active series.Use any part of the course name or the complete course number to search.For a complete course listing, clear the search field, then press Search.

Course Name		
Course Number		Class ID
Category	Select Category	Subcategory	Select SubCategory
Course Type	Select Course Type	Schedule Type	Select Course Type
Course Status	Active	Course description	

Search   Reset

Add
✔ indicates courses with Active or Confirmed classes
Showing records 1 through 10 of 509.

Select	Course Name ▼	Course Number ▼	Category Subcategory ▲	Course Type ▲
○	101 Tips Demo	240298 ✔	Business Classes:Business	Classroom
○	101 tips demo	240301	Business Classes:Business	Classroom
○	2017 Annual Exposition 📷	6130001	Conferences:Activities	Classroom
○	25 Home Based Businesses to Start for Under $1000 📷	240001	Business Classes:Business	Classroom
○	25 Home Based Businesses to Start for Under $1000	240004	Business Classes:Business	Classroom

For example, if you offer a Microsoft Word class you may want to create a course titled 'Microsoft Word.'

Keeping the titles same or similar, will allow you to only need to create a class from that course. The name, category and subcategory, description, and other details are auto-filled in the class detail during creation.

Therefore, when you create the class, your class would display titled 'Microsoft Word' – March 23rd and 24th from 7pm to 9pm, located at the Center for Learning room 112. Keep this in mind as you develop your Courses.

Now that you have experienced the site navigation from the public view, let's look at what it takes to build the courses. From the *Course Management* screen, click *Add*.

Add Course
Expand All | Collapse All

Course Information

* denotes required information.

Course Name*

Spell Check

Category Name* Select Category ▼   Subcategory Name* Select SubCategory ▼

Alternate Subcategories
(optional, for display only)
0 selected

Click here to remove selections
Academic Traveler : Day Trip
Arts : Crafts
Arts : Culinary
Arts : Music
Before & After School Programs : Cheerleading
Before & After School Programs : Dance Team
Before & After School Programs : Football

Course Number*   CIP Code

Meta Tag Keywords

Add Course Description *   Add Course Notes

Delivery Type* Select a Delivery Type ▼

Schedule Type* Select a Schedule Type ▼

URL   URL Text

Total Seats*

Number of CEU's * 0

Add Graphic Choose File No file chosen
Use jpg, gif, png file format, recommend max 50KB

Add Listing Icon Choose File No file chosen   Listing Icon Alt Descr.
Recommend approx. 15x15 png file format, <50KB

Proof-of-Completion
Template
None Selected
0_Certificate_template.tx
0_ProofOfCompletion_template.tx
0_KTCTranscriptSample_template.tx

Evaluation None Selected ▼

<u>Additional Reference</u>
QRA available in Customer Support > Document Center > Quick Reference Library >
Categories, Subcategories, and Course Numbers

# Basic Course Management
Courses – Continued

Category/Subcategory: Defines class display on courses page. Option to add multiple categories and subcategories

Course Number: Auto-fills unless using manual course numbering, plan your manual numbering (must be unique).

CIP Code: Classification of Instructional Programs (Optional).

Meta Tag Keywords: Assists in search engine optimization (SEO).

Course Description: Typically displays in print catalog so limit to a marketing message. More detail can be used in class descriptions.
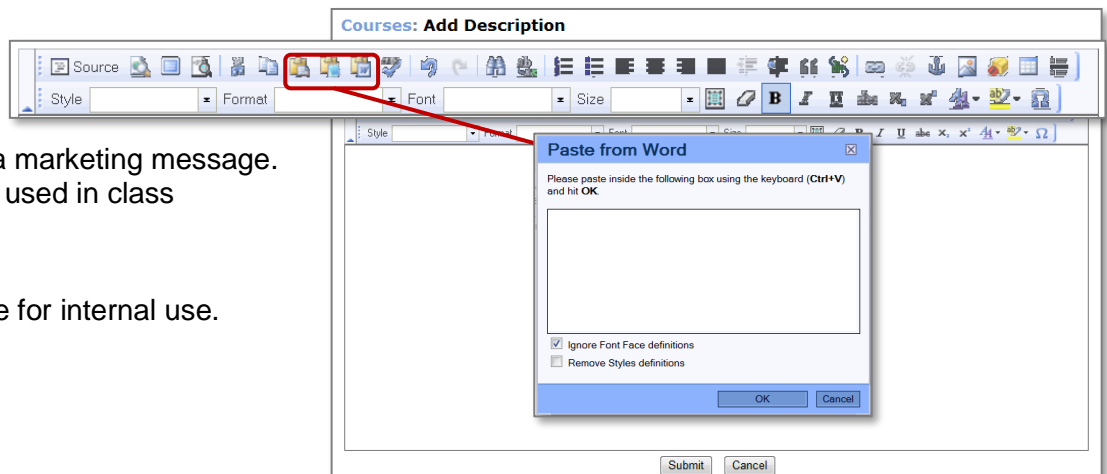
Course Notes: Are for internal use.

During course / class creation, click *Add Description* link and text editor opens.

When entering text into Lumens, be cautious <u>not</u> to use special characters as the system can mistake these characters as programming language or code. Stay away from: "(Double quotes)" 'single' quotes are OK, the # (pound sign), &, (ampersand). Instead spell out the word 'and.'

When copying text from a Word document or other documents, we recommend using the *Paste from Word* option on the toolbar. Occasionally, content copied directly into the text editor may carry embedded code only viewable behind the scenes. By using *Paste from Word* this cleans up the text and removes any unwanted code. See icons circled in screen capture.

Ripple Effect:
Save time and effort when entering your course descriptions, use *Copy & Paste from Word* on the toolbar.
.

Before setting up a schedule (in Courses) you must first select a *Delivery Type* and *Schedule Type.*

Delivery Type indicates method of teaching or delivery of training.

Select from: *Classroom, Online,* or *Hybrid*. Additional delivery methods can be added within *System Options > **List Value Management.***

- **Hybrid:** Allows class to display as a combination of delivery methods. For example, online and classroom components used on the same class.

Schedule Type refers to a scheduled course vs. open-ended course.

Scheduled: This option allows for a basic recurring schedule, flexible schedule, or a combination of the two. A flexible schedule allows you to select / enter any dates you'd like. Flexible strongly recommended for a single class meeting. We go over this more during class scheduling.

Open Ended: When creating an online class; Staff determines the duration, either *Self-Paced* or *Time Limited*. In either case, classes start on the day the Student registers. The end date is based on Student completion date (entered into Lumens by Staff) or quantity / time period (days, weeks, months).

Allow Make-up Hours? When delivery type = Classroom, make-up hours are available on a class by class basis. (feature configuration setting)

URL & URL Text: Applies to Online Courses. Add URL details.

Total Seats: The number of registrations allowed before class is filled.

Number of CEU's: (Continuing Education Units) add number if using CEU's, but not required and can be adjusted at a class level.

Add Graphic: Image feeds down to the class and is viewable by the public.

URL		URL Text	
Total Seats*			
Number of CEU's *	0		
Add Graphic	Choose File No file chosen		
Add Listing Icon	Use jpg, gif, png file format, recommend max 50KB Choose File No file chosen	Listing Icon Alt Descr.	
Proof-of-Completion Template	Recommend approx. 15x15 png file format, <50KB None Selected 0_Certificate_template.tx 0_ProofOfCompletion_template.tx 0_KTCTranscriptSample_template.tx		
Evaluation	None Selected ▼		

Add Icon Listing/Icon Description: Small image displays on course listing.

Proof-of-Completion Template: Option to provide completion document(s) to Student(s). Either multi-select list or single document; dependent on *Power User* > **Class Set-up**, click *Edit: Allow Class Proof-of-Completion templates? Multiple or Single.*

Evaluation: Option to provide Instructor feedback on a class-by-class basis. Select evaluation for course, flows down to classes, editable at class level

Course Price Information			
Tuition Fee*	0.00	Accounting Code for Class Cost	▼
Lab Fee	0.00		
Insurance Fee	0.00		
Building Fee	0.00		
Book Fee	0.00		
Program Fee	0.00	Accounting Code for Program Fee	▼
Materials Fee	0.00	Accounting Code for Materials Fee	▼
Collect Materials Fee in Advance	○ Yes ◉ No	Accounting Code for Service Fee	▼
Allow Deferred Payment Processing	○ Yes ◉ No		

Course Price Information is filled out when creating a Course.

Tuition Fee: Editable at class level.
Additional Fees include: Material, lab, insurance, building, book, program, materials, and service. (based on feature configuration setting)
Accounting Codes: Display if selected within Financial Policies.
Collect Materials Fee in Advance: If *yes*, fee collected during checkout process. If *no*, fee collected by Instructor at class. Instructor Roster identifies if material fees have been collected or not.

Information regarding registration will be specified here:

Enhanced Membership Feature

Minimum/Maximum Age: Used when course has age restriction, requires activation in *Power User > **Class Set-up Settings***

Requires Release Form: If *yes*, then select applicable release form from the drop-down list.

Allow Public Registration: If *no*, class displays contact number.

Contact Number: Default number populated from System Preferences; editable.

Allow quantity registration*:* The quantity registration feature does not have profiles for the Learner(s) that were quantitatively added on.

Registration Fee: Available if configured on site; amount set in Power User settings.

Public Registration Closes: Sets up the registration close time for either the class start date or class end date. The time is editable at the class level.

Refund Policy: Choose applicable refund policy. Editable at the class level

Allow Info Request/Info Request Email: If set to *yes* on class details page, a *Request More Info* button displays. When selected, Lumens opens an automated email with predefined email address from the course.

If your organization chooses to use *Lumens Enhanced Membership* feature the following fields will be available: Limit Self-Registration to Membership

- Counts towards Membership Benefit
- Check to save as draft

Ripple Effect:
The course information auto-populates the information in the class record.

Try It!:
Create a Course with these parameters:

- If you brought a catalog with you, add a real example Course title, just replace the information below with your own data.
- Enter an original Course name so no one else uses the same for this activity. (We'd like everyone to use a different name, so you don't run into issues.)
- Assign the Course to the Category you created and Subcategory of your choice.
- Describe the Course; enter only a sentence or two at this time.
- This is not an online class, but a face to face meeting.
- Make this a *Scheduled* course.
- Add 25 seats
- Tuition for the class can be $89.00
- No release form is required
- Public Registration = Yes
- Quantity Registration = No
- Allow Info request = Yes
- For Info Request E-mail, enter your e-mail address.
- Public Registration Closes = Class Start at 11:59PM (end of day)
- Select the *Standard Refund Policy*

When complete, return to the courses page and locate your course. Access the course via the edit feature. Read carefully and review your work for quality. If you have time, create a second course.

Questions:
How difficult / easy was the process?
_____

What details will you need when you are creating courses at your desk?
_____
_____
_____

Now that you have built the Course (or "shell"), you can create the needed Classes. Classes are built using Course information. The functional flow of information to the class saves time in the creation process.

Course → Class

Locate your Course and click on *Course Name* link.

Course Management

> You cannot delete or inactivate courses that have active classes or that are part of an active series. Use any part of the course name or the complete course number to search. For a complete course listing, clear the search field, then press Search.

Course Name			
Course Number		Class ID	
Category	Select Category ▼	Subcategory	Select SubCategory ▼
Course Type	Select Course Type ▼	Schedule Type	Select Course Type ▼
Course Status	Active ▼	Course description	

[Search] [Reset]

Add

✔ indicates courses with Active or Confirmed classes

Showing records 1 through 10 of 509.

Select	Course Name ▼	Course Number ▼	Category Subcategory ▲	Course Type ▲
○	101 Tips Demo	240298 ✔	Business Classes:Business	Classroom

Click *Add* to create a new class.

Classes
Course: 101 Tips Demo [240298]

Select	Class Name (ID)	Start Date	Remaining Seats

Add | Back to Course List

Clone: Once a class is created, new classes can be cloned from it. All class details transfer to the new class (clone) except for specific dates and the term. Additionally, most details are editable when necessary. Cloning is an excellent time saver.

Courses can be cloned too.

Try It!:

Find the Course you want to use as your base (shell) to create a new class.

You can create a class immediately following course creation by following the *Create a Class* link, or you can create a class later. To add classes later, from the left navigation bar, hover over Course Mgmt., from the Sub Menu, click Courses / Classes, search / locate the Course, then click the *Course Name*, and click the *Add* link under the Select column header.

Add Class
Expand All | Collapse All

► Class Information
► Class Schedule Information
► Class Instructor Information
► Class Cost Information
► Class Price Information
► Class Registration Information

☐ Check to save as draft

Submit | Cancel Setup

When you click *Add* class, this view is presented and quickly opens to the expanded view. When you *Edit* a class the view remains collapsed, and you can open / close the individual title bars. As usual when all data is entered, click *Submit*.

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Course Name / Number, and Category / Subcategory auto-populate, or flow from the Course. Class name flows from the course and is editable.

Add Class

Expand All | Collapse All

Class Information

*denotes required information.

Course Name/Number   #1 Excel/KTCO-3010e

Category/Subcategory   Business & Professional Development/Professional Development

Class name*   #1 Excel

Catalog*   Select Catalog

Alternate Catalog(s)
Click here to remove selections
All Catalogs
Licensure/Recertification
Learn at Your Leisure
Youth

Alternate Subcategories
(optional, for display only)
0 selected
Click here to remove selections
Business & Professional Development : Business Careers
Business & Professional Development : Coaching/Athletics
Business & Professional Development : Cosmetology
Business & Professional Development : Entrepreneurship
Business & Professional Development : Professional Development
Business & Professional Development : Project & Resource Management

Edit Class Description*   Excel

Special notice

Comments

Internal comments

Total seats*   100

Catalog: Select if applicable (will not display if catalogs are not used).

Alternate Subcategories: May be edited or added.

Class description: Defaults from the course, may be edited and formatted. This description displays to Students.

Special Notice: Displays in red as *Please Read…* on class listing page. This is information Students should know before they register for the class.

Comments: Typically appear on the Class Confirmation. This is information you want the Student to know <u>after they register</u> for the class.

Internal Comments: Display to Staff only.

Total # Seats: Comes from the course; editable at the class level.

URL	
URL Text	
Listing Icon	Browse...
	Recommend approx. 15x15 png file format, <30KB
Listing Icon Alt Description	
Number of CEUs*	0
	Enter CEUs with tenths only unless expressing a 1/2 hour. Format: nn.nn
Class Section*	
Class Attributes	None Specified / Assessment / Certification / Professional Development
	'Click-Ctrl' to select multiple options
Proof-of-Completion Template	None Selected / 0_Ananda_template.docx / 0_PianoCertificate_template.docx / 0_ClassCompletion_template.docx
Evaluation	None Selected ▾

URL & URL Text: If creating an online class, the URL will appear for the Student.

Listing Icon, **Description:** Flow from the course and are editable at class level.

Number of CEU's (Continuing Education Units): must be entered to award class registrants CEU's at the end of the class.

Class Section: Optional (this view the site has chosen it to be required).

Class Attributes: Optional.

Proof-of-Completion Template: Optional**.** Flows from course, editable at class level.

Evaluation: Option to select preferred form.

Ripple Effect:
When Staff selects more than one Cost Multiplier, Lumens automatically sets the default value to the highest corresponding cost multiplier from those selected.

Class Schedules are created as part of creating a class.

Select Term the class is offered. Only active and future terms are listed.

The Duration, Class Dates, Number of Sessions, and Contact Hours automatically populate as you create the schedule.

Class Skip Dates: Only apply to this class, i.e. Instructor not available on X date.
Allow Make-up Hours: Requires *classroom delivery method*.
Structure - Basic, Flexible, Combination:

- **Basic Structure**: For classes that recur week after week; i.e., *MS Excel 2010* meets on Monday and Thursday from 1:00 – 3:30pm for 8 weeks.
- **Flexible Structure:** For one class meeting on a single date, or for a class with a very irregular schedule. Calendar widget available to select individual dates.
- **Combination Structure:** For classes with both a recurring schedule and an irregular / flexible schedule i.e. every Monday at 8:00am and Wednesdays at 12:00pm.

Click *Add Recurring Schedule* to add basic schedule

Information:
When the term is selected, any *Global Skip Dates* within the term automatically generates a *View* link for Staff to see these dates. Any *Global Skip Date(s)* will automatically apply if the schedule coincides with a *Global Skip Date(s)*.

- You do have the option to schedule the class on a global skip date.
- To view global skip dates at the class level, the skip dates must be pre-populated in *System Options > Power User > **Global Skip Dates.***

If the *Room Management* feature is <u>active</u>, click *Add Recurring Schedule.*

Weekly Recurring Pattern: Allows Staff to select which day(s) of the week your class meets and set manner of repetition.

Enter class start date

Enter class end date
OR in place of end date

Enter duration in weeks (by doing so, the system automatically calculates the class end date).

Set recurring pattern and manner of repetition.

Select which day(s) class meets.

Contact Hours are editable.

If Room Mgmt is active, assigning a room continues in next steps.

Daily Recurring Patterns:
Every X number of days, every weekday or weekend.

Monthly Recurring Patterns: Allows the day of the week / month and frequency of occurrence.

Basic Course Management
Classes – Assigning Rooms

When Room Management is <u>active</u>, and *Assign Room Now* is set to yes.

Select appropriate room at designated location. View features to ensure room meets your needs.

Available Rooms for 101 tips demo

Current search criteria
City, Location: Any Location
Total seats: 5
Class meetings: Weekly: Mon, 9:00AM-11:00AM; March 26, 2018

Location/Room name	Room Capacity	Match status	Action
		|Back to Class Setup||Refine search|	
Woodbury Commons Red room	10	Match No conflict	Select	View features
Apple Valley-DCTC Funny Room	25	No Conflict	Select	View features
Apple Valley-DCTC Rm 120	35	No Conflict	Select	View features

Match Status is determined by capacity, within 20% of the number needed (low-end) and up to twice the number (high end).

Match: number of seats and room capacity agree with formula; good match!

No Conflict: does not meet formula, however room is available.

Match Conflict: agrees with formula; however, another class is already booked in the room at the same time.

Match Block Conflict: There is a room block some time during class meeting(s).

Review Room Selection

for 101 tips demo

City, Location:	Woodbury, Woodbury Commons
Room:	Red room
Class schedule:	Weekly: Mon, 9:00AM-11:00AM; March 26, 2018
Setup instructions	
Notes	

Click 'Continue' to finalize your room selection and complete class setup.
Click 'Back' to cancel your room selection and return to search for a different room.

[Continue]   [Back]   [Back to Class Setup]

Add any setup instructions and / or notes.

Reports available to schedule and auto-email to person(s) managing your rooms.

Start Time*		(Example: 8:15AM)
End Time*		(Example: 9:15AM)
Contact Hours	0.00 Hrs	
Edit Contact Hours ☐		
City, Location*	Select City ▾	Select Location ▾
Classroom*		

[Continue] [Cancel]

Select *Instructor* for the class and *Biography.* If Instructor has multiple biographies, select the appropriate one that correlates with the selected class.

Select *Rate Type* and *Rate or Percentage* for Instructor payment (if earnings and payments are active). Then enter *Hrs. to Pay,* if applicable.

Select Accounting Code from drop down list for Instructor payment if tracking.

Select *Use in Go#?* If you want to use these values in the Go/No Go calculation.

Click *Confirmed*? if Instructor is already confirmed to teach the class. It can be added later. This is found in *Class Info > **Instructor Checklist**.*

Multiple Instructors can be added, click Add in upper left corner.

There is also an option to remove an Instructor.

Basic Course Management

Classes – Class Cost Information

This view allows Staff to enter costs (expenses) associated with running the class. Select appropriate accounting code(s), and whether to use the cost to compute the Go/No Go Number (click *Yes* or *No*).

Class Price Information: Data flows from the course and is editable at the class level.

Additional Fees: Can be added at the class level, if activated on your website.

Accounting Codes: Available at the class level if selected within Financial Policies.

Computed Go Number: Calculated based on either the Number of Registrations or by Class Receipts. This is your organization's choice.

Override Go Numbers: Allows Staff to enter a different number than the one calculated. If the override number remains blank, the computed value is used in applicable reports.

Basic Course Management
Classes - Class Registration Information

Public Display start and end dates: Automatically populate from Term. Class display dates cannot be earlier than term chosen.

Featured Classes display dates: Allow Staff to promote / feature a class for a set period.

Public Registration Begins and Closes dates: Based on *class dates,* Course *Public Registration Closes On,* and term.

Staff Display Starts and Ends: Parameters set for when Staff can view classes online. Remember that Staff must see the classes to register Students.

Staff Registration Begins date: If dated before *public registration begins date*, allows Staff to preregister Students.

Requires Release form?: Whether it is required and which form is required can be edited. The default is based on what was entered at the Course level.

Display to Public: Allows Staff to create a class <u>not</u> viewable to anyone except Staff.

Display Instructional Method: Can be set to display at the individual class level. Staff must activate in *Power User > **General Settings** <u>and</u> Power User > **Class Listing Display Settings***

Allow Pubic Registration: Populates from the course, editable.

Allow quantity registration: Allows a Student to add others to the class, in one transaction. If activated, the quantity registration feature does not save profile data for the additional people added to the class. You will only have the extra Student's name, but not a profile.

Allow multiple registrations per Student? Feature allows Student to register for the same class multiple times if desired.

If your organization chooses to use Lumens Enhanced Membership feature.

Limit Self-Registration to Membership: Staff can limit self-registration for one or more membership types.

Counts towards Membership Benefit: If activated, benefits allow the Member to take X number of classes <u>or</u> spend X amount of money tuition-free for a term or calendar year. Staff assigns the membership type(s) that receive the benefit when a member registers for a class. Editable at the class level.

Registration Fee: Populates from the course (editable, amount set in *Power User > **General Settings***)

Marketed in Catalog: This is tied to the Class Performance feature.

Check to save as draft: Enter minimal information required and return later to finish building the class.

Click *Submit* when all required and necessary data has been entered.

- Class ID (11304) is automatically assigned by the system.

Staff can create several different class schedules. In addition to a basic recurring class schedule, Staff can add various schedule structures: flexible and combination.

*Course Mgmt > Course/Classes > Course Name > **Add Class***

Flexible Scheduling Structure: Allows Staff to select single dates for very irregular schedule structures or one class meeting on a single date or assign different Instructors to certain portions of the class.

- **Structure**: Select *Flexible*

- **Flexible Dates**: A*dd* various dates, use calendar widget, click *Done*.

Or

Flexible Dates: Enter Single Date, click *Add* button.

<u>Repeat</u> for each individual date, as needed.

After entering a single date or selecting multiple dates, from this screen Staff can,

Add details for each row individually, using the select drop down lists.

Click checkbox in front of *Date(s)* or *Select All*

Click *Add Details* button to assign specific class details for multiple sessions at one time.

- Instructional Method drop down list originates from *System Options > **List Value Management***
- Contact Hours are editable.

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With *Room Management* activated you may assign a room.

With *Room Management* deactivated manually enter classroom.

Combination Schedule Structure: Is another class schedule structure for classes with both recurring schedules and irregular or flexible schedule needs.

- Structure: Select *Combination*
- Add Recurring Schedule(s)
- Add Flexible Dates

This is great for a recurring schedule with a few anomalous dates in the schedule that do not match the regular pattern.

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Add Recurring Schedule:

Enter *Instructional Method*

Enter *Start* and *End Date* or enter *Start Date* and *Duration* (in weeks).

Weekly Pattern: Select which day(s) of week and set mode of repetition.
Monthly Pattern: Enter the day of week / month, enter frequency of occurrence.
Daily Pattern: Enter every number of days or click every weekday or click every weekend.

<u>Try It!</u>:
Create a class with the following parameters:
Add a class to the course you created earlier (you can adjust the name of the class just for fun). If you created a course based on your catalog, replace the information below with an applicable match to your course.

- Keep the class description from the course description added earlier.
- Special Notice: *Must know how to…XXX* (fill in an applicable response)
- Class Comments: *Please bring …* (applicable content)
- # of CEU's: Add 1.2 CEU's (you can bypass this if you don't use CEU's)
- Select term
- Click *Add Recurring Schedules* (Basic structure schedule)
- Select *Instructional Method*
- Class Start Date: use calendar widget, select a Tuesday in the future (skip end date)
- Enter Duration: 3 weeks
- Make the schedule weekly every Tuesday and Thursday from 1pm – 3pm
- Assign city and location, skip room assignment
- Instructor: Choose an Instructor you created earlier
- Rate Type & Rate / Percentage: Select Hourly Rate at $55.00 an hr.
- Enter applicable Class Cost Information.
- Enter any additional Class Price Information, i.e. $10.00 Materials Fee if applicable
- Release Form: select No, not needed in this instance
- Display Instructional Method: select *Yes*
- Public Registration: Choose *Yes*
- Refund Policy: use the standard policy

<u>Clone</u> the class you just created, select a Wednesday start date in the future, and schedule a Monthly meeting for 6 months.
Document the following information:

Display Start Date   _____

Display End Date   _____

Public Registration Begins   _____

Public Registration Closes   _____

Staff Registration Begins   _____

_____

<u>Questions:</u>
How difficult/easy was the process? _____
What details will you need readily available when you are creating classes?
_____

Objectives for Basic Student Management:
- Create a Student profile
- Locate Student profile information
- Discuss Student demographics

This section of the workbook will focus on the Student profile and covers the steps necessary to create a profile and locate information regarding that profile. In addition, your team will discuss the types of demographics your organization wants to gather.

Students > Student Management

Household Profiles are available if active on site.
Household profiles work best for family registrations where a parent or guardian is registering child/children in a single household making a single payment. We'll discuss later if applicable.

When a Student registers for a class, he / she creates a Learner Profile. On occasion, Staff may need to help develop the profile or build it for the Student.

The next few pages cover the necessary information to create a Student profile.

The example listed is the standard profile for a Learner. Later in training, we will review how to add additional demographics using the optional and custom field tools. Examples of items you can add to the Student Profile:
- Date of Birth
- Gender
- Job Title
- Resident

These profile items can be used for demographic reports and defining certain discounts. There are a variety of uses for demographic details.

Optional Demographic Fields: used to collect data from your Students. Only collect information you plan to use. (internal note that you can reference or speak to)

- Academically Disadvantaged
- Alternate ID
- Alumni
- Birthdate
- CIP Code of Major
- Company Type
- Country
- County
- Displaced Homemaker
- Email Preference
- Economically Disadvantage Family or Individual
- Preferred Race -
- Education Level
- Employee
- Employer
- Ethnicity

- How did you hear about us
- In Directory
- Individual with Disabilities
- Job Title
- Limited English Proficiency
- Major Type
- Race
- Remote Campus
- Resident
- Seniors
- Single Parent
- Gender
- Transfer
- Transfer FICE Code
- Tuition Exemption / Waiver Code
- Tuition Status of CE Students

Questions:

Do you know what type of demographic information you need to gather about your Learners? List some here. _____

How does your organization use demographics – reports, discounts, marketing? _____

Retention Activity:

Discuss which of these fields may be applicable for your organization. *Optional Fields* will be covered later in training. At that time, you can enable applicable fields. *Custom Fields* may also be developed.

To ensure uniqueness of profiles and restrict duplicate profile creation, Augusoft recommends enabling the *Email As User Name* feature.

As a result, when Staff creates a Student's profile, he / she receives a separate email containing a link to establish his / her password in Lumens (refer to email template, *Student Profile Completion*). Upon Student access, he / she is required to set his / her own password.

Add Student

Update your site by replacing this text with your own message.
*denotes required information.

Profile

Registration Hold ☐

no email ☐

This will be the student's username on this site.
E-mail * [   ]

Re-enter Email * [   ]

Username* Username: minimum 6 characters
[   ]

Registration Hold ☐

no email ☑

E-mail [   ]
Re-enter Email [   ]

Password* Password: minimum 8 characters, must contain a number and any two of the following three: upper case, lower case, special characters (for example: (){}!@$%^&*)
[   ] Strength ☐☐☐☐

Re-enter password* [   ]

Requires activation in *System Options > Power User > **General Settings***

When a Student builds own profile, a password is required. As a result, the Student does <u>not</u> receive an email to create a password.

Both Student and Staff can change Student's username.

When Student does not have an email, Staff checks the *no email* box. Activating no email displays the username field for Staff to manually enter preferred username. An email entered here is not used as a username, only for the purpose of communication. As a result, when an email is included, Student receives the same email with link to create his / her own password.

If email address is <u>not</u> entered, then Staff can change the Student's password.

Ripple Effect:
In keeping with Internet security best practices, if the *Email Address* field is populated, the password is not available for editing by Staff. Instead, instruct Student to access sign-in page and click, *Forgot Your Password?*

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Students

Search for Students by the search fields below.
For a complete list of Students, click 'Reset' and then click 'Search'.

Last Name		First Name		Search Reset
Zip		Phone Number	
City		State	
Email		Learner ID	
Student Type		Student Status	Active
Alternate Learner ID		VCCS SIS ID	
Company Name		Learner Address	

Showing records 1 through 10 of 101.   **Add New :**

(Select Profile Type)
Student
Household Profile
Household Profile from existing Student

Add Student

*denotes required information.

Profile

Registration Hold	☐
no email	☐
E-mail *	This will be the student's username on this site.
Re-enter Email *	
Identity Verification Question	None specified
Identity Verification Answer	
First name*	
Middle Name	
Last name*	
Company	None specified

Primary Address   **Secondary Address**

Address Type Line 1*		Address Type Line 2	☐ Same as Primary Address
Country*	U.S.A.	Country	U.S.A.
line 1 > Address*		line 1 > Address	
line 2 > Address		line 2 > Address	
City*		City	
State*	Alabama	State	Alabama
Zip*		Zip	
Zip+4		Zip+4	

Phone*	None specified Ext 999-999-9999
Additional phones	None specified Ext 999-999-9999
	None specified Ext 999-999-9999
	None specified Ext 999-999-9999

Registration Hold:
Allows Staff to block Student from adding classes to shopping cart. May be activated or inactivated as needed.

Email as username: If already in use, alert pops up stating that the email is not unique.

Company: Used for *Third Party Pay*.

Ripple Effect:
Registration Hold does not prevent a Student from creating another profile.

Mail preference: *Catalog Mailing List* has a built-in filter that only includes profiles with Mail preference set to *Yes*

Email preference: Available as an optional field; you may opt to activate.

Demographics: Activated and added through optional and custom fields.

Internal Comments: Any notes entered are viewable by Staff only. After submitting, a red diamond displays next to the Student's name on the Student listing page indicating there are internal comments on the Student profile.

For more information on *Email as Username* (Staff view, new Student) or *Household Profiles* feature go to *Customer Support > Document Center > Quick Reference Library.*

Basic Student Management
Student Profiles

During verification of Unique Profile - any <u>two</u> of the following fields are considered a possible match.

- First Name <u>and</u> Last Name
  - Address 1 <u>and</u> City
    - Phone Type <u>and</u> Phone Number
      - Email Address
      - Birthdate

Possible Duplicate Student Profile Detected

One or more student profiles with similar information already exists.
If the student verifies that one of these similar profiles is theirs and they have forgotten their username or password, click the 'This Student' button and follow the instructions, otherwise click the 'Create a New Profile' button to create a new profile!

Existing Student Profile		Information Just Entered	
Student Name:	Bonnie Abbott	Student Name:	Bonnie Abbott
Address:	123 Central	Address:	123 Central
City:	Waterloo	City:	Waterloo
State:	IA	State:	IA
Zip:	50703	Zip:	50703
Phone:	612-555-9898	Phone:	612-555-9898
Email:	bonnie@email.com	Email:	babbot@email.com
Birth Date:		Birth Date:	

This Student | Create a New Profile

Staff View

The *Record Found* displays common profile features (common name and address, different person). Staff can create the profile or search for the Student and bring up the existing profile.

Possible Duplicate Student Profile Detected

One or more student profiles with similar information already exists.
If you think that one of these similar profiles is yours and you have forgotten your username or password, click the 'This is Me!' button and follow the instructions, otherwise click the 'Create a New Profile for Me!' button to create a new profile!

Existing Student Profile		Information Just Entered	
Student Name:	Su*********th	Student Name:	Sue Smith
Address:	24****************	Address:	123 Main Street
City:	Smithfield	City:	Denver
State:	RI	State:	CO
Zip:	02917	Zip:	80017
Phone:	401-765-1367	Phone:	401-765-1367
Email:	ssmith@demo6.net	Email:	ssmith@demo6.net
Birth Date:	11/11/1983	Birth Date:	11/11/1983

This is Me! | Create A New Profile For Me!

Student View

If the Student recognizes the profile, he / she can click, *Forgot Password* button.

Try It!:

Use your organizational email address for the username

(Reminder: all usernames must be unique)

- Use a password that is easy to remember!
- Enter a hint and verification question / answer – important to be familiar with this feature.
- Use your own name or a variation. You will use this profile later in training.
- **Address:** Use a mock address or your office address.
- **Phone:** Add your office phone number.
- **Demographic or academic information:** Answer any of required details or information you want to include.
- Add an internal comment, such as Staff Member.

Document the following information: (Reminder to add user name and password to your tracking sheet)

Username _____

Password _____

Hint / Verification details _____

Locate your Learner profile, review the print view, and profile notice.

For your security normally, we would not encourage documenting the above information in a readily available resource, but we are using a staging site and want to use this profile again later in training. You should have easy access to the data during training.

Questions:

How difficult / easy was the process? _____

Do you anticipate having to create profiles for your Learners?

_____

Where you able to locate your profile information easily?

_____

Objectives for Basic Registration:

- Using your Staff member profile, register a Learner in Lumens
- Process various payments during the registration process

This section of the workbook will focus on Learner registrations. We will discuss the basics of registration along with several types of payment options.

These are basic tools. We will go into more depth as we continue through the training programs. This will provide a basic understanding of the registration options.

Staff can register Students for classes from Student Management or the Browse Menu.

Registration > **Student Management**

Students

Search for Students by the search fields below.
For a complete list of Students, click 'Reset' and then click 'Search'.

Last Name		**First Name**	Search Reset
Zip		**Phone Number**	
City		**State**	
Email		**Learner ID**	
Student Type		**Student Status**	Active
Company Name		**Learner Address**	

Showing records 1 through 10 of 41.

Add New : (Select Profile Type)

Student Profile
Edit
Inactivate
Print View
Create Voucher
Profile Notice
Buy Membership
Consolidate Profiles
Login as
Account
Gift Card
Buy Gift Card
Registration
Register
Purchase
Late Registration
Current Registration
Donate
Transcripts
TranHistory
Transfer
Waiting List
Cancel
Upload File
Class Mgmt
Record Grades
Record Attendance
Record Make-up Hours

	Name	Student Type	Status
	alexander, jason	Learner	Active

Register: Staff uses to register Learner for a class.

Late Registration: In some situations, Staff must register a Student for a class after the class has ended. Late Registration connects Staff to classes that have ended (run status). Your organization defines how far back (timeframe) to allow late registrations, it can be between 0-999 days after a class has ended. (Augusoft recommends no more than 30 days.)

Current Registrations: Displays all classes the Learner is registered for, where the class has not ended.

Transcript: Displays all classes the Learner is registered for that are in *Run* status. *CEU's, Grades,* and *Attendance* display on the transcript if activated.

Tran History: Provides a view of all the Learner transactions (registrations, cancelations, payments, transfers, etc.).

Waiting List: This view displays any classes, courses, or course series the Learner is on the waitlist for and his / her rank.

Cancel: Allows Staff to drop the Learner from a class. Like late registration, your organization defines the options cancellations can occur based on the class end date.

Go to *Student Management*, select the Student profile, and choose *Register* from the drop-down menu next to the Student's name.

Select	Name	Student Type	Membership Type	Status
	Alberts, Evelyn A	Learner		Active

Student Profile
Edit
Inactivate
Print View
Create Voucher
Profile Notice
Buy Membership
Consolidate Profiles
Login as
Account
Gift Card
Buy Gift Card
Registration
Register
Purchase
Late Registration
Current Registration
Donate
Transcripts
TranHistory
Transfer
Waiting List
Cancel
Upload File
Class Mgmt
Record Grades
Record Attendance
Record Make-up Hours

Locate Category
Click on *Subcategory Title*
Select *Class* and Click *Add To Cart*

Courses

To find a topic in a specific area, look under the headings below and then click on that subject to see related classes. You may also **search** for a course by its title, number or instructor.

Please let us know if you do not see a course you are looking for. We will do our best to help you!! Thank you for your business.

CERTIFICATES	THE MILL	COMPUTER TECHNOLOGY	HEALTH
Dental ›	The MILL ›	Computer Certificate Programs ›	Dental ›
Mobile Technology ›			Health Careers ›
Ms Certification ›			Nursing & Allied Health ›

Foundations for Healthcare Careers

– Edit

CAH145   Instructor : Instructor Alt Name

Tuition: $239.00   Materials Cost: $294.00   Member Cost: $239.00

Schedule : Weekly - Mon, Tue, Wed, Thu 9:00 AM - 2:00 PM; 8 sessions; starting 5/7/2018, ending 5/17/2018

Weekly - Mon, Tue, Wed, Thu 9:00 AM - 2:00 PM (5/7/2018-5/17/2018)

Days of the Week : Weekly - Mon, Tue, Wed, Thu .

4% filled   26 Seats Left

ADD TO CART »

From the Browse or *Main Course* page, click the preferred Subcategory.

Next, the system navigates you to the *Subcategory Listing* page.
Locate the preferred class and click *Add To Cart* button. This updates the Shopping Cart view.
Click *View Cart* or *Checkout.*

View Cart

The Student name, class name, and refund policy are links to access the Student profile, class details page, and view the refund policy.

Basic Registration

The Refund Policy is already checked for Staff. Bear in mind, when Students self-register he / she must manually check this box (To change this setting go to *Power Users > **Refund Policy -*** Click *Edit,* then click, *Require refund policy acknowledgement).*

Upon completion, click *Checkout.*

Shopping Cart

Now that you have added your class(es) to the shopping cart, to finalize check out you must agree to the refund policy. If you have any questions about your registration, please email nobody@augusoft.edu or call 612-331-8301. Have a great class!

Student Details	Class Details	Amount
Alberts, Evelyn (10900) testing4@augusoft.net 756 Jones Street Marion , IA 52302 817-563-0644	Foundations for Healthcare Careers, CAH145 Start Date: 5/7/2018, Instructor: Abramson	☑ Agree to Refund Policy Remove Class
	Tuition Fee	$239.00
	Material Fee	$294.00
Registration Fee		$10.00

Total	
Total	**$543.00**

Discounts and Checkout

Update your site by replacing this text with your own message.

Apply Gift Code

Checkout Donate Clear Cart Choose Additional Classes

Checkout

In addition, you may apply various codes from this view. We will discuss discounts, promotions, and gift cards later. Additional classes can still be added before payment process is complete. Click *Choose Additional Classes* button to find and add any other classes to the shopping cart.

When credit card is selected, click *Continue Checkout* to launch the credit card payment process.

Registering *Evelyn Alberts*
Home:Cart:Choose Payment Method

Continue Checkout

Payment amount: $543.00   Credit amount used on this order: $0.00

Receivables current balance: $0.00

☐ Use 3rd Party Payment?

Select one payment method:
◉ Credit card
○ Check
○ Cash
○ 3rd party account/PO/Voucher
○ Student Account
○ EFT (Electronic Fund Transfer)
○ Credit card - terminal

* OR *
○ Split the payment

* OR *
○ Process an overpayment

Continue Checkout

Credit card processing occurs using a separate gateway processing environment.

Augusoft Lumens College

Order Summary

Order Date	04/19/18
Order Amount	$543.00
Order Number	926093
Customer IP	72.50.219.82
Description	Foundations for Healthcare Careers

Credit Card Information

Card Type	Visa
Name as on Card	Evelyn Alberts
Card Billing Address	756 Jones Street
Card Billing Zipcode	52302
Card Number	
Card Expiration Date	
	MMYY
Card ID (CVV2/CID) Number	

What is the Card ID?

Process Payment >>   **Cancel**

You are navigated to the USAePay Gateway page (external credit card processing system) to enter credit card information.

At this stage enter the credit card information and click *Process Payment*.

Ripple Effect:
Credit Card Terminal provided by the merchant is used as an alternative method of credit card payment. Bear in mind, credit card terminal only updates Lumens. When used during registration, Staff must manually enter credit card information into a credit card gateway outside of Lumens.

When the payment is processed you are returned to the payment process page, which indicates the transaction is complete.

Home: Cart: Payment Process

Your transaction has been processed successfully.

Transaction Completed for Evelyn Alberts | Done
Register | Current Registrations | TranHistory

Add memo text to this transaction

Display printable receipt

Print confirmations

Back to Students screen

Registering Evelyn Alberts
Home:Cart:Choose Payment Method

Continue Checkout

Payment amount: $543.00   *Credit amount used on this order:* $0.00

Receivables current balance: $0.00

☐ Use 3rd Party Payment?

Select one payment method:
○ Credit card
◉ Check

Check Number	
Check Name	Evelyn Alberts
Country	U.S.A.
Check Address	756 Jones Street
Address 2	
City	Marion
State	Iowa
Zip	52302
Zip+4	

○ Cash
○ 3rd party account/PO/Voucher
○ Student Account
○ EFT (Electronic Fund Transfer)
○ Credit card - terminal

When the payment method is check, enter the Check Number.

The Learner information automatically populates from the Student's profile; this data can be changed on this screen to match the check provided.

Click *Continue Checkout* to process.

Check Payment

When the Learner pays with cash, select the cash option.

Registering *Evelyn Alberts*
Home:Cart:Choose Payment Method

Continue Checkout

Payment amount: $543.00 Credit amount used on this order: $0.00

Receivables current balance: $0.00

☐ Use 3rd Party Payment?

Select one payment method:
○ Credit card
○ Check
◉ Cash
○ 3rd party account/PO/Voucher
○ Student Account
○ EFT (Electronic Fund Transfer)
○ Credit card - terminal

* OR *
○ Split the payment

* OR *
○ Process an overpayment

Click *Continue Checkout* to process.

Home:Cart:Split Payment

Continue Checkout

Payment amount: $543.00   Credit amount used on this order: $0.00
Receivables current balance: $0.00

Payment (1)

Payment Amount [   ]

☐ Use 3rd Party Payment?

Choose one payment method:
◉ Credit card
○ Check
○ Cash
○ 3rd party account/PO/Voucher
○ Student Account
○ EFT (Electronic Fund Transfer)
○ Credit card - terminal

Payment (2)

Payment Amount [   ]

☐ Use 3rd Party Payment?

Choose one payment method:
◉ Credit card
○ Check
○ Cash
○ 3rd party account/PO/Voucher
○ Student Account
○ EFT (Electronic Fund Transfer)
○ Credit card - terminal

What if the Learner brings two payment types?

This screen displays two payment options, choose the applicable methods, and enter the amounts in the *Payment Amount* fields.

These two fields <u>must</u> equal the total payment amount due located at the top of the page.

Click *Continue Checkout* to process.

If one of your payments is a credit card, the credit card screen will follow.

Below are the options for *3rd Party Pay, Student Account, Overpayment,* and *Underpayment.* (Use of *3rd Party Pay* and *Student Account* are only available if the features are activated on your site.)

Registering Evelyn Alberts
Home:Cart:Choose Payment Method

Continue Checkout

Payment amount: $543.00   Credit amount used on this order: $0.00

Receivables current balance: $0.00

☐ Use 3rd Party Payment?

Select one payment method:
- ● Credit card
- ○ Check
- ○ Cash
- ○ 3rd party account/PO/Voucher
- ○ Student Account
- ○ EFT (Electronic Fund Transfer)
- ○ Credit card - terminal

* OR *
- ○ Split the payment

* OR *
- ○ Process an overpayment

Continue Checkout

Third Party Account: This option allows another party (instead of the Student) to pay for the registration. For example, an employer may have an agreement with your organization to pay for certain classes for their employees. *Third Party Accounts* will be discussed later in training.

Student Account: Selecting Student Account immediately creates an Accounts Receivable record in the Learner's name. This allows the Learner to register for a class on account or on credit. The organization then manages payments on the account using the A/R feature. If you do not use accounts receivable, the Student Account option will not display.

Overpayments: This provides for an immediate refund. The Student may have paid more for the class, not taking into consideration a discount or promotion, and left the payment with the registration office. Now Staff needs to refund the overpayment. You can choose different refund options including allotting the excess to an electronic voucher for the Learner to use on his / her next registration. This feature must be configured.

Underpayments: This option allows Staff to accept a lesser amount for the class with <u>no expectation</u> of receiving the balance later. An underpayment does <u>not</u> go on account pending additional funds. The underpayment creates a miscellaneous credit on the transaction (therefore a loss to your organization). This feature, like overpayments, is configured on your site.

Basic Registration

Basic System Options Review

This review is based on the *Basic System Options Module*. Use this review to check your knowledge of the topics and objectives of the module.

Objectives for Basic System Options:
- Discuss the System Preferences
- Review and discuss the Financial Policies settings
- Create a term in the Instructional Calendar

To complete this review, use the *Basic System Options Module* as a resource.
- The review has five questions (multiple choice or True / False).
- Answer the questions to the best of your knowledge.
- Compare your responses against the answer key (how did you do?).

1. Accounting Codes can be added to the following levels.
   - Category and Subcategories
   - Courses and Classes
   - Locations
   - All of the Above

2. T / F: Lumens provides an option to use different accounting codes for class fees.

3. Which fields are masked when *Data Masking* is used?
   - Names
   - Social Security Number / Alternate Learner ID
   - Addresses
   - All of the Above

4. T / F: A term can be deleted at any time.

5. A terms' display date affects whose ability to view the class?
   - Student's view
   - Staff's view
   - Both Students and Staff's view
   - Neither Students nor Staff's view

Knowledge Review
Basic System Options Review Key

Review answer key:

Expected Results	Explanation
Accounting Codes can be added to the following levels. o All of the Above	
T: Lumens provides an option to use different accounting codes for class fees.	
Which fields are masked when *Data Masking* is used? o Social Security Number / Alternate Learner ID	*You can choose full masking or partial masking.*
F: A term can be deleted at any time.	A term can only be deleted if no classes have been assigned to it.
A terms' display date affects whose ability to view the class? o Both Students and Staff's view	

Additional Reference:
*Customer Support > Document Center > Quick Reference Library > **Accounting Code Management***

Knowledge Review
Basic Room Management Review

This review is based on the *Basic Room Management Module*. Use this review to check your knowledge of the topics and objectives of the module.

Objectives for Basic Room Management:
- Add locations to your Lumens site
- Create basic room features
- Add rooms to your locations in Lumens

To complete this review, use the *Basic Room Management Module* as a resource.
- The review has five statements below.
- Add the missing information.
- Compare your responses against the answer key (how did you do?).

If Room Management is not activated on your Lumens site, locations will still be available. It will be located under the following menu _____.

Graphics for the location can be added. These graphics will be viewable to _____.

A location can be deleted if: _____.

If a location or room is inactivated it will not be _____but _____

A _____ are required when creating a location.

Knowledge Review
Basic Room Management Review Key

Review answer key:

If Room Management is not activated on your Lumens site, locations will still be available. It will be located under the following menu _____Course Management menu_____.

Graphics for the location can be added. These graphics will be viewable to _____Learners / Guest – anyone viewing the class with the location_____.

A location can be deleted if: ___no class has been assigned to the location_____.

If a location or room is inactivated it will not be ___viewable in location choices_____but _____can be reactivated_____

A _____contact person and directions_____ are required when creating a location.

Additional Reference: *Customer Support Menu > Document Center > Lumens Lite >* ***Room Management – Juggling Rooms***

Knowledge Review
Basic Instructors Review

This review is based on the *Basic Instructor Module*. Use this review to check your knowledge of the topics and objectives of the module.

Objectives for Basic Instructors:
- Add an Instructor profile
- Review Job Titles for Lumens
- Discuss Education Level and Company Type details in Lumens.

To complete this review, use the *Basic Instructor Module* as a resource.
- The review has five statements below.
- Add the missing information.
- Compare your responses against the answer key (how did you do?).

If *Earnings & Payments* is not activated on your Lumens site, this link does not display under the _____.

Images for the Instructor can be added. These images will be viewable to _____.

An Instructor can be deleted if _____.

If an Instructor is inactivated it will _____ and _____.

Job Titles, Education Levels, and Company Types will be available _____.

Knowledge Review

Basic Instructors Review Key

Review answer key:

If *Earnings & Payments* is not activated on your Lumens site, this link does not display under the _____Instructor Profile_____.

Images for the Instructor can be added. These images will be viewable to _____anyone browsing your site_____.

An Instructor can be deleted if
_____no class has been assigned to him / her_____.

If an Instructor is inactivated it will _____be viewable under the inactive status in search_____ and ____can also be reactivated_____.

Job Titles, Education Levels, and Company Types will be available
_____in drop down lists within the Instructor and Staff profile views_____.

Additional Reference:
Help (upper right corner), from contents, click *Instructors > Instructor Profiles > **Adding an Instructor Profile***

Knowledge Review
Basic Course Management Review

This review is based on the *Basic Course Management Module.* Use this review to check your knowledge of the topics and objectives of the module.

Objectives for Basic Course Management:
- Create a Student profile
- Locate Student profile information
- Discuss Student demographics

To complete this review, use the *Basic Course Management Module* as a resource.
- The review has five questions (multiple choice or True / False).
- Answer the questions to the best of your knowledge.
- Compare your responses against the answer key (how did you do?).

1. Which of the following fields are pulled from the Course and pre-populated into the class?
   o Category/Subcategory
   o Class Name
   o Total Seats
   o All of the above

2. **T/F:** The public display dates listed for a class have no impact on the staff registration dates.

3. How do class skip dates affect the schedule?
   o Class skip dates only affect the specific class the skip dates are assigned.
   o Class skip dates affect all classes created under that course.
   o Class skip dates affect all classes created under that subcategory.
   o Class skip dates have limited effect on the class itself.

4. **T/F:** The public registration time of 12:00am or 11:59pm is editable at the class level.

5. There is a required 'order' to class development. What is the required order?
   o First Course, then Class, then Category, and Subcategory
   o First Class, then Course, then Subcategory, then Category
   o First Subcategory, then Category, then Course, then Class
   o First Category, then Subcategory, then Course, then Class

Knowledge Review
Basic Course Management Review Key

Review answer key:

Expected Results	Related Information
Which of the following fields are pulled from the Course and pre-populated into the Class? o All of the above	Remember that course info flows down to the class.
T: The Public Display dates listed for a class have no impact on the <u>staff</u> registration dates.	True, when creating a class, the staff dates are separate from the public display dates, and therefore does not affect staff registrations.
How do class skip dates affect the schedule? o Class skip dates only affect the specific class the skip dates are assigned.	Class skip dates only affect recurring class schedules
T: The public registration time of 12:00am or 11:59PM is editable at the class level.	True – The time can be adjusted at the class level whether you choose the 11:59PM or the 12:00 AM option.
There is a required 'order' to class development. What is that required order? o First Category, then Subcategory, then Course, then Class	

Additional Reference:
*Customer Support > Document Center > Training Review Documents > **Training Triage: Course Creation***

Knowledge Review
Basic Student Management Review

This review is based on the *Basic Student Management Module*. Use this review to check your knowledge of the topics and objectives of the module.

Objectives for Basic Student Management:
- Create a Student profile
- Locate Student profile information
- Discuss Student demographics

To complete this review, use the *Basic Student Management Module* as a resource.
- The review has five questions (multiple choice or True / False).
- Answer the questions to the best of your knowledge.
- Compare your responses against the answer key (how did you do?).

1. **T / F:** Usernames cannot be changed.

2. Which of the following demographic information can be added to profiles?
- Date of Birth
- Gender
- Resident
- All of the above

3. **T / F:** Passwords cannot be changed by Staff.

4. Inactivated Student profiles can be located in the _____.
- Print View
- Profile Notice
- Student Status of Inactive
- The inactive profile is no longer available for viewing

5. **T / F:** Usernames must be unique.

Knowledge Review
Basic Student Management Review Key

Review answer key:

Expected Results	Related Information
F: Username can be changed by Staff and Student	False, Username can be changed by both Staff and the leaner.
Which of the following demographic information can be added to profiles? o All of the above	
T & F: Passwords cannot be changed by Staff.	Passwords cannot be changed by Staff. Unless using *email as username* and Staff has selected No Email and email address field remains blank, then Staff can change password.
Inactivated Student profiles can be located in the _____. o Student Status of Inactive	
T: Usernames must be unique.	True, All usernames must be unique, whether Learner, member, household, Instructor or Staff.

Additional Reference:
*Customer Support > Online Training >Student Experience > **Profile Creation***

Knowledge Review
Basic Registration Review

This review is based on the *Basic Registration Module*. Use this review to check your knowledge of the topics and objectives of the module.

Objectives for Basic Registration:
- Register a Learner in Lumens as a Staff member
- Process various payments during the registration process

Ask yourself if the module met the objective.

◆

To complete this review, use the *Basic Registration Module* as a resource.
- The review has five questions (multiple choice or True / False).
- Answer the questions to the best of your knowledge.
- Compare your responses against the answer key (how did you do?).

Choose the most applicable response.

1. **T / F:** A registration payment can be split between two payment types.

2. Which of these payment options are available in Lumens?
   - Check
   - Cash
   - Credit Card Terminal
   - All of the Above

3. **T / F:** Underpayments take the balance and apply it to the Student Account to be paid by the Learner at a later date.

4. Which of the following information is provided in the Trans History view?
   - All Transactions
   - Only Registrations
   - Only Transfers and Cancels
   - All Transcripts

5. **T / F:** Credit card processing occurs via an external system connection overlaid on your Lumens site, not actually within Lumens.

Knowledge Review
Basic Registration Review Key

Review answer key:

Expected Results	Explanation
T / F: A registration payment can be split between two payment types.	True
Which of these payment options are available in Lumens? ○ All of the Above	All of the Above
T / F: Underpayments take the balance and applies it to the Student Account to be paid by the Learner at a later date.	False – Underpayments become a misc. Student credit.
Which of the following information is provided in the Trans History view? ○ All Transactions	All Transactions
T / F: Credit card processing occurs via an external system connection.	True

Additional Reference:
*Customer Support > Online Training > **Staff Registration***
- Register using Credit Card (7.5 min)
- Register using Check (3 min)
- Register using 3rd Party (6.75)
- Register using Student Account (4 min)
- Register using Split Payment (7 min)
- Register using Underpayment (4 min)
- Register using Overpayment (3 min)