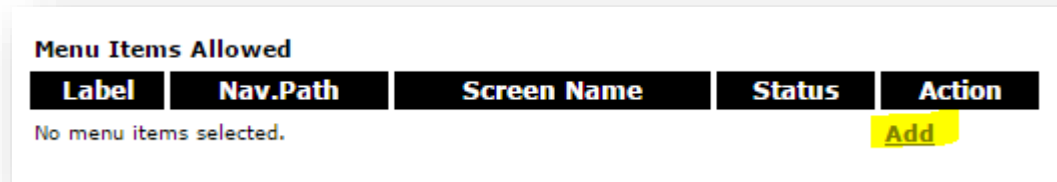# QRA: Estimated and Actual Class Cost and Expense Tracking

Staff can organize and track historical and current class costs and expenses using Estimated and Actual Class Cost and Expense Tracking. For example, filtering the new "Class Cost Comparison Report" by time period, staff can compare Spring 2013 to Spring 2015 to determine if costs have increased or decreased. (This feature must be configured-call Customer Support to configure for your Pro License)

Grant staff access within appropriate user roles

System Options > User Role

- Create a new user role by selecting "Add", name the user role, click "Submit". Click "add" under "Menu Items Allowed"
- If you need to edit an existing user role, click "Edit", then click "Add" under "Menu Items Allowed"

- Scroll until courses/classes is visible and check the box to add

- Click "Submit"
- At "Access Selection" decide whether user role may view or edit the "View Run/Canceled Class". Edit access allows Staff to change costs and expenses of classes in "Run" status

QRA: Enhanced Cost and Expense Tracking – Page 1

Costs of running the class

- Once Customer Support configures "Enhanced Class Cost and Expense Tracking", Power Users must edit "Class Set Up Settings" adding relevant costs

Power Users: System Settings: Edit Class Set-Up Settings

Close registration how many days prior to class start date?	0
Late registration how many days after class end date?	60
Cancel/Transfer registration how many days after class end date?	60
Use Registration Age Limits?	○ Yes ● No
Quality Score upper Limit*	5
Allow Class Proof-of-Completion templates?*	None ▼
Send class reminders to students and Instructors?	Neither of the above
Send reminders to students before time-limited classes end?*	● Yes ○ No
Default time period before time-limited classes end*	Qty: 1 Interval:
Default for Class Costs to Calculate Go/No Go Number?*	Curr. Dev. / Curr. Dev. / Marketing Costs / FICA

Default Class Cost Multiplier Values:*
Add

- Power users may include Instructor Costs, Material Costs, Preparation, Overhead, Marketing Costs, Teaching, or Travel as relevant costs
- As staff create new classes or edit run status classes, enter relevant costs and expenses

Add Class

Expand All | Collapse All

▶ Class Information
▶ Class Schedule Information
▶ Class Instructor Information
▼ Class Cost Information

Cost Type	Cost Name	Estimated Cost	Accounting Code	Used to Compute Go/No Go?	Include in Overhead Calculation?
Material	Organization's Material Cost	0.00		● Yes ○ No	● Yes ○ No
Facilities	Facilities	25		○ Yes ● No	● Yes ○ No
Marketing	Marketing Costs	100		○ Yes ● No	○ Yes ● No
	Other	0.00		● Yes ○ No	● Yes ○ No
Overhead Cost multiplier :		1			
Overhead	Overhead	$0.00		yes	N/A

- Go/No Go is separate from Class Costs. To be included in the report, the "Estimated Cost" must track and include "Overhead Calculations"

Enhanced Reports

- Access "Class Cost Comparison Report", under "Catalog Management"

catalog mgmt	Type	Action
Cancelled/Deleted Classes	Standard	Run / Schedule | Edit | Edit Description | Add to my favorites | Help
Catalog Mailing List	Standard	Run / Schedule | Edit | Edit Description | Add to my favorites | Help
Catalog Production – Multiple	Standard	Run / Schedule | Edit | Edit Description | Add to my favorites
Catalog Production – Single	Standard	Run / Schedule | Edit | Edit Description | Add to my favorites | Help
Catalog Production II – Single	Standard	Run / Schedule | Edit Description | Add to my favorites | Help
Class capacity	Standard	Run / Schedule | Edit | Edit Description | Add to my favorites | Help
Class Cost Comparison	Standard	Run / Schedule | Edit | Edit Description | Add to my favorites
Class Information	Standard	Run / Schedule | Edit | Edit Description | Add to my favorites | Help
Company Information	Standard	Run / Schedule | Edit | Edit Description | Add to my favorites | Help
Course Information	Standard	Run / Schedule | Edit | Edit Description | Add to my favorites | Help
Course Series Capacity	Standard	Run / Schedule | Edit | Edit Description | Add to my favorites | Help
Course Series Participants	Standard	Run | Edit Description | Add to my favorites | Help
Course Suggestions	Standard	Run / Schedule | Edit | Edit Description | Add to my favorites
Data verification	Standard	Run / Schedule | Edit | Edit Description | Add to my favorites | Help
Instructor Mailing List	Standard	Run / Schedule | Edit | Edit Description | Add to my favorites | Help
Instructor Utilization	Standard	Run / Schedule | Edit | Edit Description | Add to my favorites | Help

- Filters allow staff to track and compare actual and estimated costs and expenses
- Filter to track from year to year or from term to term to get historical information

Report Filter: Class Cost Comparison

No Saved Filters

Search Filter

Classes in Term	Spring 2015 / 2015 School Calendar
Category	Adult Education
Subcategory	Select SubCategory
Show Costs	Actual & Estimated Costs ▼