

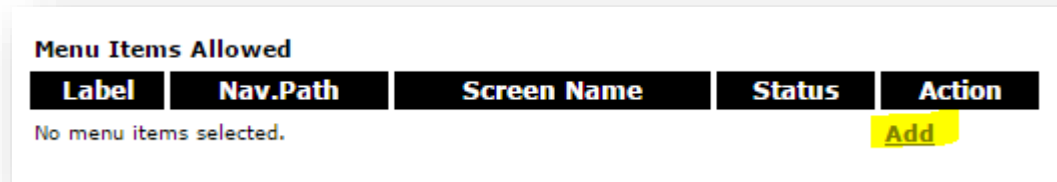
## QRA: Estimated and Actual Class Cost and Expense Tracking

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

Label	Nav.Path	Screen Name	Status	Action
COURSE MGMT	-	COURSE MGMT		<input checked="" type="checkbox"/>
catalogs	COURSE MGMT/catalogs	catalogs		<input checked="" type="checkbox"/>
categories	COURSE MGMT/categories	categories		<input checked="" type="checkbox"/>
<b>courses/classes</b>	<b>COURSE MGMT/courses/classes</b>	<b>courses/classes</b>		<input checked="" type="checkbox"/>

- 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

#### Access Selection

Please select the appropriate levels of access for the following links by selecting one of the following options.

Screen/Function Name	Nav. Path	Action/Link	Access Options
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Hide
  View Access Only
  Edit Access

## 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?

Late registration how many days after class end date?

Cancel/Transfer registration how many days after class end date?

Use Registration Age Limits?  Yes  No

Quality Score upper Limit\*

Allow Class Proof-of-Completion templates?\*

Send class reminders to students and Instructors?

Send reminders to students before time-limited classes end?\*  Yes  No

Default time period before time-limited classes end\* Qty:  Interval:

**Default for Class Costs to Calculate Go/No Go Number?**

Default Class Cost Multiplier Values:\* [Add](#)

**Cost Selection:**

- Curr. Dev.
- Curr. Dev.
- Marketing Costs
- FICA

- 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	<input type="text" value="0.00"/>	<input type="text"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No
Facilities	Facilities	<input type="text" value="25"/>	<input type="text"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No
Marketing	Marketing Costs	<input type="text" value="100"/>	<input type="text"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No
	Other	<input type="text" value="0.00"/>	<input type="text"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No
Overhead Cost multiplier :	<input type="text" value="1"/>				
Overhead	Overhead	\$0.00	<input type="text"/>	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
<a href="#">Cancelled/Deleted Classes</a>	Standard	<a href="#">Run / Schedule</a>   <a href="#">Edit</a>   <a href="#">Edit Description</a>   <a href="#">Add to my favorites</a>   <a href="#">Help</a>
<a href="#">Catalog Mailing List</a>	Standard	<a href="#">Run / Schedule</a>   <a href="#">Edit</a>   <a href="#">Edit Description</a>   <a href="#">Add to my favorites</a>   <a href="#">Help</a>
<a href="#">Catalog Production - Multiple</a>	Standard	<a href="#">Run / Schedule</a>   <a href="#">Edit</a>   <a href="#">Edit Description</a>   <a href="#">Add to my favorites</a>
<a href="#">Catalog Production - Single</a>	Standard	<a href="#">Run / Schedule</a>   <a href="#">Edit</a>   <a href="#">Edit Description</a>   <a href="#">Add to my favorites</a>   <a href="#">Help</a>
<a href="#">Catalog Production II - Single</a>	Standard	<a href="#">Run / Schedule</a>   <a href="#">Edit</a>   <a href="#">Edit Description</a>   <a href="#">Add to my favorites</a>   <a href="#">Help</a>
<a href="#">Class Capacity</a>	Standard	<a href="#">Run / Schedule</a>   <a href="#">Edit</a>   <a href="#">Edit Description</a>   <a href="#">Add to my favorites</a>   <a href="#">Help</a>
<a href="#">Class Cost Comparison</a>	Standard	<a href="#">Run / Schedule</a>   <a href="#">Edit</a>   <a href="#">Edit Description</a>   <a href="#">Add to my favorites</a>
<a href="#">Class Information</a>	Standard	<a href="#">Run / Schedule</a>   <a href="#">Edit</a>   <a href="#">Edit Description</a>   <a href="#">Add to my favorites</a>   <a href="#">Help</a>
<a href="#">Company Information</a>	Standard	<a href="#">Run / Schedule</a>   <a href="#">Edit</a>   <a href="#">Edit Description</a>   <a href="#">Add to my favorites</a>   <a href="#">Help</a>
<a href="#">Course Information</a>	Standard	<a href="#">Run / Schedule</a>   <a href="#">Edit</a>   <a href="#">Edit Description</a>   <a href="#">Add to my favorites</a>   <a href="#">Help</a>
<a href="#">Course Series Capacity</a>	Standard	<a href="#">Run / Schedule</a>   <a href="#">Edit</a>   <a href="#">Edit Description</a>   <a href="#">Add to my favorites</a>   <a href="#">Help</a>
<a href="#">Course Series Participants</a>	Standard	<a href="#">Run / Schedule</a>   <a href="#">Edit</a>   <a href="#">Edit Description</a>   <a href="#">Add to my favorites</a>   <a href="#">Help</a>
<a href="#">Course Suggestions</a>	Standard	<a href="#">Run / Schedule</a>   <a href="#">Edit</a>   <a href="#">Edit Description</a>   <a href="#">Add to my favorites</a>
<a href="#">Data verification</a>	Standard	<a href="#">Run / Schedule</a>   <a href="#">Edit</a>   <a href="#">Edit Description</a>   <a href="#">Add to my favorites</a>   <a href="#">Help</a>
<a href="#">Instructor Mailing List</a>	Standard	<a href="#">Run / Schedule</a>   <a href="#">Edit</a>   <a href="#">Edit Description</a>   <a href="#">Add to my favorites</a>   <a href="#">Help</a>
<a href="#">Instructor Utilization</a>	Standard	<a href="#">Run / Schedule</a>   <a href="#">Edit</a>   <a href="#">Edit Description</a>   <a href="#">Add to my favorites</a>   <a href="#">Help</a>

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- 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**

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