Augusoft®

Lumens Instructor Management

Earnings, Payments and Contracts

Contents

Instructor Management Program Overview
Introduction

Welcome to Augusoft Lumens!

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.
- Each topic and subtopic are 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 Instructor Management Workbook will ensure you have the knowledge needed to manage Instructor financials in Lumens, including Contracts and Earnings and Payments.

The Lumens Instructor Management Workbook will include training on the following topics:

- Instructors – including earnings, payments, and contracts
- Reports

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 also to frame thought about the way you will setup your site.

Ripple Effect indicates the importance of understanding the information as well as how it impacts other areas that will 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 new content.

Instructor Profile

Instructor Profile

Objectives for Instructors:
- Review an addition of an Instructor profile
- Review Instructor Earnings and Payments in Lumens
- Create an Instructor Contract Template in Document Editor
- Create individual and multiple contracts in Lumens using Document Editor.

This section of the workbook focuses on the design and development of Instructor profiles for your site.

Instructors > **Instructor Profiles**

Review from other workbooks:
You may want to create a naming convention for Instructor usernames to be consistent. Remember, they must be unique.

Creating a TBD Instructor allows the organization to create a Class even if unsure who will teach.

An instructor cannot create his or her own profile nor can they edit their picture, bio, or access (for example, the ability to update grades and/or attendance). A Staff member must create instructor profiles and make certain modifications.

Instructor Profile
Instructor Profile - Continued

To add an Instructor, Click *Add* in the action column.

Among the many required fields, Bio Name and Bio Details are required.

Additional fields may be added in Optional and Custom Fields.

The maximum size allowed for an Instructor photo is 50KB.

Instructor Profile
Instructor Profile - Continued

An active Instructor can be edited. Click the radio button so the drop-down menu appears. Click *Edit* link so the profile view will display.

Select	Instructor Name	Instructor Status
Add		
○	Abramson, Maurice 🔗	Active
Edit Inactivate Earnings & Payments Profile Notice	Adams, Howard 📷	Active
	Adkins, Chris	Active

Inactivate / Activate an Instructor: An Instructor profile can be inactivated. A warning message displays to confirm inactivation of the record. Once completed, the Instructor's status changes to inactive (click the status option in the search view). He or she can be reactivated if needed.

Earnings & Payments: This is an optional feature in Lumens and is only viewable if active. We will review this feature later in training.

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

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

[Image] 📷 : The camera indicates the profile has a picture associated with it.

[Image] 🔗 : The link indicates the site is using linked profiles and this profile is linked to a Student or Staff profile.

Instructor profiles can be imported for a small service fee. If interested, talk to your Implementation Specialist.

<u>Try It!:</u>
Modify an existing Instructor:
- Locate an Instructor
- Add a Bio (look at the existing and a complementary second bio, e.g. Excel Expert Bio, add a PowerPoint Expert Bio.
- Add a picture (if you have one available)
- Click, Submit when complete.

<u>Questions:</u>
Do you want to allow Instructors to view the earnings and payments in their profile? If yes, notify Augusoft Customer Service to activate this option.

Instructor Profile
Earnings & Payments

Instructors > ***Instructor Profiles***

To use this feature, you must request to configure your site to use Instructor Earnings and Payments. The information in earnings and payments is based on the payment type and rate entered in Class details.

Select	Instructor Name	Instructor Status
Add		
○	Abramson, Maurice	Active
○	Adams, Howard	Active
	Adkins, Chris	Active

Edit
Inactivate
Earnings & Payments
Profile Notice

Ripple Effect:

Instructor Earnings & Payments is <u>not</u> a payroll module. This is an internal way to track gross payments to an Instructor. Use of this feature will allow you to use the Instructor Contracts feature.

Questions:

Do you currently track Instructor earnings or payments outside of a payroll feature? If so, what do you track?

Approve Instructor Earnings

Instructor Profile
Earnings & Payments - Continued

The screen displays Classes and payments that are Unapproved, Approved, and Payments tracked. To move a payment amount from Unapproved to Approved, click *Approve*.

Classes displaying in Red are in *Run* status.

A pop up appears. Comments are encouraged but not required. The Approved Earnings date is auto populated with the payment amount, but both can be edited (if you are paying a different amount than what was entered in the Class payment field). The approval date defaults to current but can be edited. If the date is edited to a future date, the Class information will not move to approved until that date.

Comments can be viewed in the Instructor Payment Report. The Class name is a link to review the Class in the category view.

Click *Approve*.

Ripple Effect:
The details posted are coming from the information entered at the Class level including, the payment type / rate / hours and instructional method. The Payment Amt displayed is calculated based on the type / rate / hours.

The payment amount approved, will move to the Approved Instructor Earnings field along with all the Class details and the coded approval date.

Click *Edit* to adjust the approval and the comments entered.

Click *Pay,* to document a payment to the Instructor.

A pop up appears (like the approval). The payment amount does not default; you must enter a payment amount. The Payment Date defaults to current date, but this can be edited. Like approvals, if a future date is entered, the Class details will not move to the Instructor Payment view until that date. Comments are required to complete the payment documentation.

When complete, click *Save*.

Partial payments can be documented by adjusting the amount of the payment in the payment field. If the full amount is not being paid, the balance will stay under Approved Earnings and the payment amount will display under Instructor Payments. This process can be done until all the approved amount has been paid.

Instructor Profile
Earnings & Payments - Continued

Instructor Earnings and Payments for Chris Adkins

Back to Instructors

Classes listed in Red are in Run status.

	Class	Class Name	Start Date	Payment Type	Rate or %	Hour(s) to be paid	Instructional Method	Payment Amt
				Unapproved Instructor Earnings				
Approve	27585	Advanced Microsoft Tables & Graphs	6/18/2018	Hourly Rate	20	21.00	Classroom	$420.00
Approve	27661	12 Lead EKG Interpretation	7/9/2018	Flat Rate	150	8.00	Classroom	$150.00
Approve	27589	Continuous Color for Your Garden	8/9/2018	Flat Rate	50	0.00	Classroom	$50.00

	Class	Class Name	Approval Date	Payment Type	Rate or %	Hour(s) to be paid	Instructional Method	Amt Approved	Amt Paid	Balance Remaining
				Approved Instructor Earnings						
No Approved Earnings at this time.										

	Class	Class Name	Payment Date	Payment Type	Rate or %	Hour(s) to be paid	Instructional Method	Amt Approved	Amt Paid	Balance Remaining
				Instructor Payments						
Edit	27278	Continuous Color for Your Garden	8/8/2018	Flat Rate	50	0	Classroom	$50.00	$50.00	$0.00
Edit	26916	Advanced Microsoft Tables & Graphs	8/8/2014	Hourly Rate	20	21	Classroom	$420.00	$420.00	$0.00

The Class displays the Instructor payment as paid and displays a paid date. If partial payment was made, the amount paid will display under Instructor Payments as well as a Class view under Approved Instructor Earnings that will display the balance of the approved amount. To complete those payments, follow the same payment tracking process.

We would recommend that this is tracked in accordance with your Instructor pay system. Tracking in Lumens can support an overall picture of a program including Instructors costs and payout dates.

Try It!:
- Locate an Instructor with a Class associated (may use a previously built Instructor).
- Approve at least one Class payment.
- Do not complete the payment yet (we will review that with the Instructor contracts.

Document the Instructor and Class you approved.

_____

Instructor Profile
Earnings & Payments - Continued

My Profile

Login name	k0003422
Password hint	
First name	Chris
Middle initial	
Last name	Adkins
Employer	
Company type	Other
Job title	Instructor
Lumens Instructor ID	154
Instructor ID	****3422
Country	U.S.A.
Address line 1	162 Charmaine Lane
Address line 2	
City	Cedar Rapids
State	IA
Zip	52404
Zip+4	
Phone(s)	806-426-2683 - Evening
E-mail	testing4@augusoft.net
Make public	None
Birth date	
Educational level	None specified
Gender	Male
Earnings Last Calendar Year	$0.00
Payments Last Calendar Year	$0.00
Earnings This Calendar Year	$3,135.00
Payments This Calendar Year	$50.00
Total balance	$3,085.00

This will display in the Instructor's profile if your site is configured to display earnings and payments to Instructor.

Ripple Effect:
The Instructor payments and earnings can also be viewed in the Instructor Payment report (under Financial Analysis). Additionally, if configured, Instructors can see this information on their own profile.

Instructor Contracts

Default Templates

*Instructors > Instructor Contracts > **Create Default Template***

The document editor view for Instructors Contracts will have an example template loaded. Click on Show Saved Documents and click on the sample template.
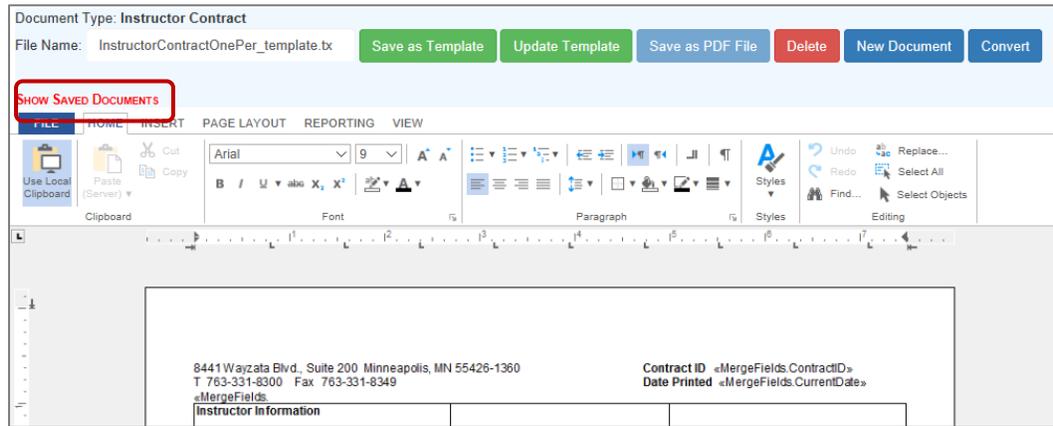
We recommend a contract template for each type of Instructor (internal and external).

Tabs are similar to those available on Microsoft Word. The above screen displays the home tab, additional tabs are:
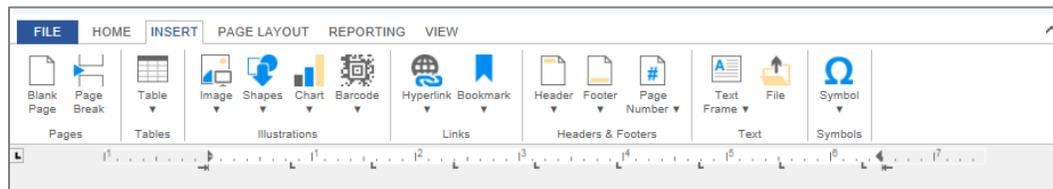
Insert
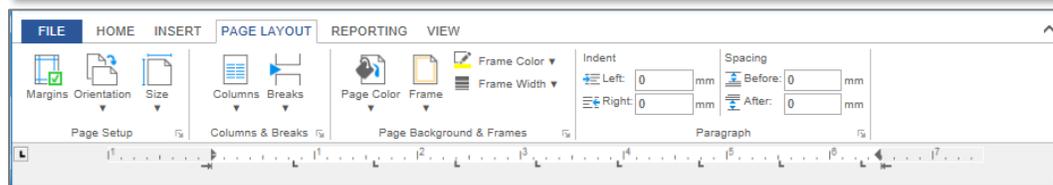
Page Layout
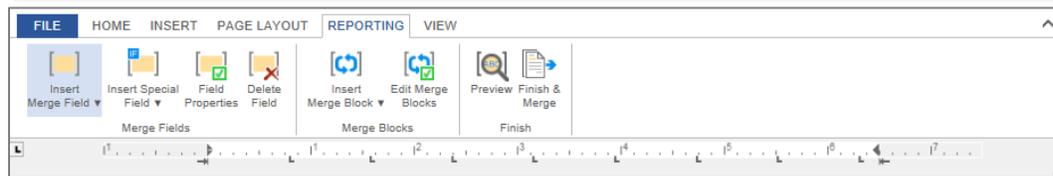
Reporting
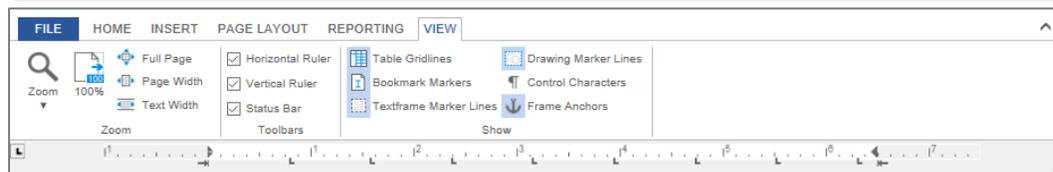
View

Instructor Contracts
Default Templates - Continued

If you have an existing contract, you can copy/paste that contract into the document editor. If not, enter the appropriate information for your contract details. The document editor works like a word processing program.

The merge fields are used to pull details into the contract specific to the Instructor and the Class.
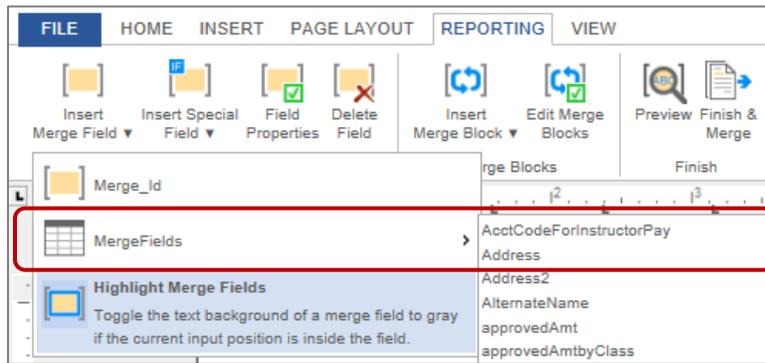
To remove a merge field, highlight the field and click *Delete Field.* This ensures the connection to the data field is entirely eliminated.

If you have multiple details to display, such as multiple classes, add fields to "merge."
From the template view Choose Reporting > Insert Merge Block > Merge Block > Select the applicable table columns that are multiple fields. This indicates that the field may have multiple fields to display. To remove the Merge Block, use the Edit Merge Block option.

Once you have created a template, enter a file name, and click *Save as Template*.
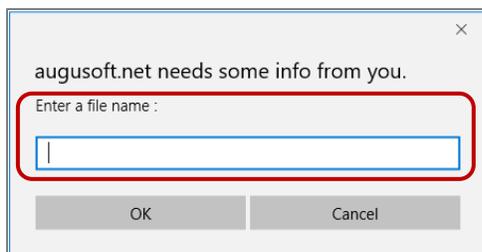
The template will now be displayable under Show Saved Documents. Multiple templates can be created.

Retention Activity:
Build a sample contract in Document Editor.
Test the example in staging with an Instructor and Class.

Additional Reference:
The Document Editor has tools available to assist you in creating applicable templates.
Customer Support > Document Center > Quick Reference Library > **Document Editor Fundamentals**
Customer Support > Document Center > Quick Reference Library > **Document Editor Mail Merge/Blocks**

Instructor Contracts

Create & Print Contracts

Instructor > ***Instructor Contracts***

Instructors :

Instructor Contracts

Search for Instructor by Instructor Last Name		
Contract Status	No Approved Earnings / Partial Approved Earnings / All Approved Earnings / All Recorded Payments / Cancelled	Term [dropdown]
Contract issue date before		Contract issue date after [____] [m/d/yyyy]
ClassID		Class Name [____]
Category	Select Category	Subcategory Select SubCategory

Search

Instructor Name ^	Class Name	Contract Issue Date ^	Contract Type	Contract Amt	Amt Paid	Bal Remaining	Contract Status ⌄	Action
								Create Default Template	Print Contracts
								One per Instructor ☐

No result to display

The Instructor contract view allows you to filter your view by Instructor name, contract status, contract dates, Classes, etc. Contract Status is a filter based on the earnings and payments view of each Instructor. You can locate multiple Instructors using the Advanced Search feature.

Before you begin:
- Ensure you have a Contract Template applicable to the Instructor needs
- Confirm earnings have been moved to Approved Status (see below)

Locate the instructor using applicable filters to narrow your search.

Instructor Name ^	Class Name	Contract Issue Date ^	Contract Type	Contract Amt	Amt Paid	Bal Remaining	Contract Status ⌄	Action
								Create Default Template	
Select all								Print Contracts One per Instructor ☐
☑ Adkins, Chris	27585 - Advanced Microsoft Tables & Graphs		Open Enrollment	$420.00	$0.00	$420.00	All Approved Earnings	

Click in the checkbox next to the name(s) of the Instructor/Class you want to create a contract for using the same template.

Click *Print Contracts* to begin the process.
- One Per Instructor, provides the option to create multiple contracts in one activity. If you have 3 contracts to build using the same template, you can check this box, each instructor and you will get a resulting document for each Instructor.

Information:
If the Power User setting (*System Options > Power User > General Settings*) is set to *Yes* under *Allow Unapproved Earnings in an Instructor Contract,* then unapproved earnings can be used in a contract.

Instructor Contracts
Create & Print Contracts - Continued

Click *Show Saved Documents* to display the templates.
Click on the template you want to use to create the contract(s).
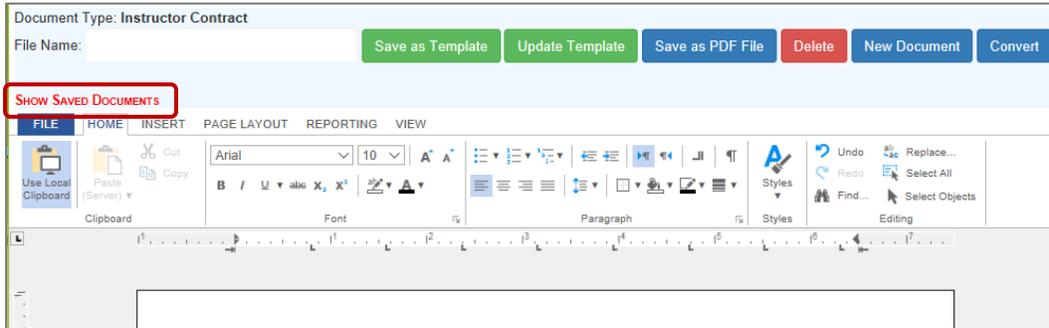
Click the Reporting tab and choose *Preview*.
The pop up will let you define the number of results, then click *OK*.
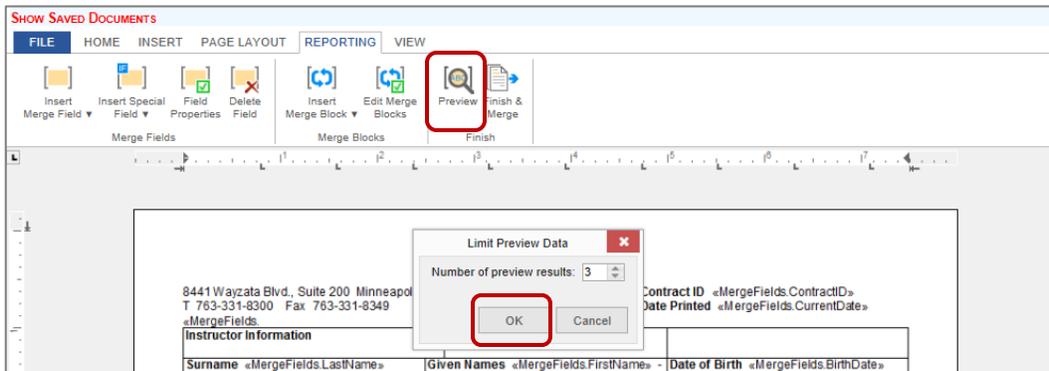
Contract preview will display. Review contract(s). If you have multiple contracts or multiple Instructors, the navigation arrows will display. Close the preview.
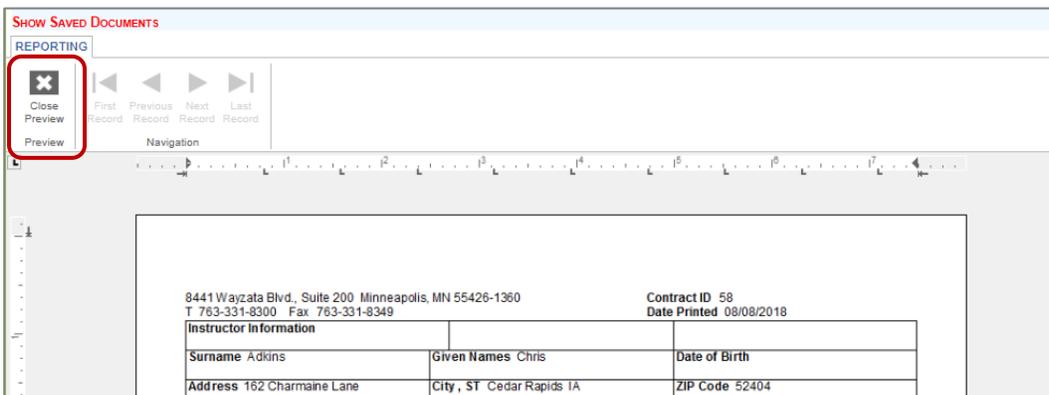
Instructor Contracts
Create & Print Contracts - Continued

After preview, click *Finish & Merge*, then click *Save as PDF File.*

The Pop up that appears will ask to Populate Contract Issue Date?

- If you choose *OK*, the main Instructor Contract view will display the current date as the Contract Issue Date.
- If you choose *Cancel* you will continue to save but the date will not be populated.
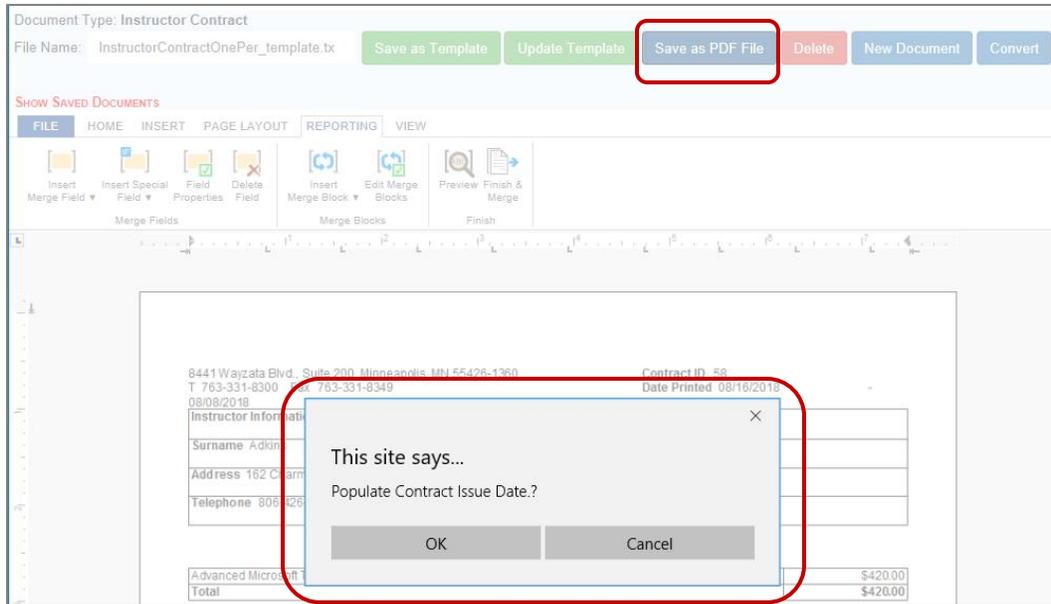
You will receive an option at the bottom of your browser to open, save or cancel.

Save the file in the appropriate <u>internal</u> location (Lumens does not save contract information.)

Save using an applicable naming convention. The default is the name of the template.

Instructor Contracts
Create & Print Contracts - Continued

If you choose to have the contract date populated, the field will display here.

Instructors :

Instructor Contracts

Search for Instructor by Instructor Last Name	adkin							
Contract Type	● Class ○ Project							
Contract Status	All Approved Earning: ⌄			Term	⌄			
Contract issue date before	[m/d/yyyy] ▦			Contract issue date after	[m/d/yyyy] ▦			
ClassID				Class Name				
Category	Select Category ⌄			Subcategory	Select SubCategory ⌄			

Search

Instructor Name ⌃	Class Name	Contract Issue Date ⌃	Contract Type	Contract Amt	Amt Paid	Bal Remaining	Contract Status ⌄	Action
Select all								Create Default Template | Print Contracts One per Instructor ☐
☐ Adkins, Chris	27585 - Advanced Microsoft Tables & Graphs	08/08/2018	Open Enrollment	$420.00	$0.00	$420.00	All Approved Earnings	Cancel

<u>Try It!</u>

Create a contract, using an Instructor and Class you created. Note where you saved the PDF (we want to ensure that PDF is later deleted as a test).

For which Instructor / Class did you create a contract? Did you populate the contract date?

_____

<u>Questions:</u>

Do you anticipate that your organization will use Instructor Contract capabilities?
What do you currently use to create and distribute Instructor contracts?

_____

Reports
Instructor Reports

Objectives for Reports:
- Discuss the details available in the Instructor Payment report
- Run the report to compare against activities
- Review Instructor Utilization report for informational purposes.

This section of the workbook focuses on the reports available to track Instructor financials.

◆

*Reports > Financial Analysis > **Instructor Payment***
The Instructor Payment report is run based on Class dates. This report can be run based on payment status and Class status to assist in confirming applicable details for payment.

Multiple choices are available by holding the Ctrl key down during selection of multiple status.

Payment Status Options are:
- No Approved Earnings
- Approved Earnings / No Recorded Payments
- Recorded Payments

Reports
Instructor Reports - Continued

Instructor Payment Report:
This is a general view of the Standard report. This report can be customized.

Report Criteria	Value
Term	Calendar 2018
Earning Payment Status:	Approved Earnings/ No Recorded Payments
Include Classes with Status:	Active ,Confirmed ,Run
Instructor Last Name Contains:	adkins

Instructor profile details

Instructor First Name	Instructor Last Name	Custom Instructor ID	Lumens Instructor ID	Instructor Address1	Instructor Address2	Instructor City	Instructor State	Instructor Zip Code	Instructor Zip+4	Instructor Email
Chris	Adkins	k0003422	154	162 Charmaine Lane		Cedar Rapids	IA	52404		testing4@augusoft.net

Class Details

Instructor Phone1 Number	Instructor Phone1 Extension	Instructor Phone1 Type	Catalog Name	Class Name	Course Number	Class ID	Class Start Date	Class End Date	# of Class Sessions	Class Contact Hours	Class Location
806-426-2683		Evening	All Catalogs	Advanced Microsoft Tables & Graphs	3000020	27585	06/18/2018	06/27/2018	4	12.00	Tippie Education Center

Class Financials

Gross Tuition Fee	Class Costs Excluding Materials	Materials Cost	Class Costs & Material Cost	Material Fees Collected in Advance	Class Registration Payment	Students Enrolled	Electronic Voucher Payments	Misc. Credits/Charges	Total Promotions	Total Discounts	Class Acct Code For Class Fees
$79.00	$79.00	$0.00	$79.00	NO	$0.00	0	$0.00	$0.00	$0.00	$0.00	100-2020

Instructor Payment details

Class Acct Code For Class Fees	Instructor Payment Type	Instructor Payment Rate	Calculated Instructor Earnings Amount	Approved Instructor Earnings Amount	Recorded Instructor Earnings Amount	Payment Date	Instructor Earnings Approval Date	Staff Member who Approved	Class Status	Net Tuition Fees	Class Receipts
100-2020	Hourly Rate	$20	$420.00	$420.00	$0.00		08/08/2018	Poweruser 1, Terri	Run	$0.00	$0.00

Try It!:
- Run the report for the Instructor you approved.
- Review the details.

What amount is listed as approved and the amount paid?
Approved Amount_____
Payment Amount _____

*Reports > Catalog Management > **Instructor Utilization***

The Instructor Utilization report is run based on Class dates. This report will also provide a Contract Issue Date and you can customize to include payment information. Specifically, it will provide details about the Class the Instructor is assigned including registration numbers, contact hours, and Class status.

Knowledge Review
Instructors Review

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

Objectives for Instructors:
- Review an addition of an Instructor profile
- Create an Instructor Contract Template in Document Editor
- Review Instructor Earnings and Payments in Lumens
- Create individual and multiple contracts in Lumens using document editor.

To complete this review, use the *Instructors 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?).

An Instructor earning must be _____ in the earnings and payment view to display in the Instructor contract.

You must click *OK* in the pop-up message window when saving as a PDF in order to populate the _____.

You can create _____ Instructor contracts.

You can create _____ contracts just by choosing _____ Instructors and Classes in the Instructor contracts view.

Locating multiple Instructors / Classes in the Instructor contract view can be done by choosing the _____.

Knowledge Review
Instructors Review Key

Review answer key:

An Instructor earning must be in the _____approved status_____ in the earnings and payment view to display in the Instructor Contract (unless the settings allow otherwise).

You must click *OK* in the pop-up message window when saving as a PDF in order to populate the _____contract issue date_____.

You can create _____multiple_____ Instructor contract templates.

You can create _____multiple_____ contracts just by choosing _____multiple_____ Instructors and Classes in the Instructor contracts view.

Locating multiple Instructors/Classes in the Instructor contract view can be done by using the _____advanced search option_____.

Additional Reference:

*Customer Support > Document Center > Quick Reference Aids > **Instructor Contracts for Single Classes***

*Customer Support > Document Center > Quick Reference Aids > **Instructor Contracts for Multiple Classes***

*Customer Support > Document Center > Quick Reference Aids > **Instructor Earnings and Payments***

Knowledge Review
Reports Review

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

Objectives for Reports:
- Discuss the details available in the Instructor Payment report
- Run the report to compare against activities
- Review Instructor Utilization report for informational purposes.

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

The Instructor Utilization report can be filtered by specific _____.

The Instructor Payment report is run based on _____ start or end dates.

The _____ report also provides the Contract Issue Date created when a contract is built and saved.

The Instructor Payment report includes details on the Class financials such as, _____, _____, _____ and _____ .

Knowledge Review

Reports Review Key

Review answer key:

The Instructor Utilization report can be filtered by specific _____Instructors_____.

The Instructor Payment report is run based on _____Class_____ start or end dates.

The _____Instructor Utilization_____ report also provides the Contract Issue Date created when a contract is built and saved.

The Instructor Payment report includes details on the Class financials such as, ___tuition_____, _____materials_____, _____promotions_____ and _____ discounts_____.

Additional Reference:
*Customer Support > Document Center > Lumens Lite > **Instructors Earnings & Payments Report***