Lumens Contract Training Essentials

Lumen Pro Add On

Contents

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 menus and submenus in Lumens. This workbook was designed to make it easy for you to follow along with training and to reference as you build your site.

Following this program, you will begin to establish the necessary components to run and manage a contract or customized training program.

The Contract Training (CT) program is designed to provide you with the tools necessary to effectively use the CT features and functionality. In addition, the Company can manage some of the registration needs of the program and run certain reports to track the progression of the programs they run through your organization.

Following this program, you will begin development of your companies and the process you will choose to use in Lumens to manage your Contract Training.

The Contract Training program includes the following topics:

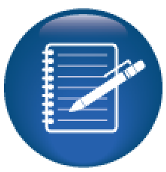
- Creation of Companies
- Creation of Contract Training (CT) Classes
- Assignment of Students to applicable CT Classes
- Contract Training Reports
- Company Views to help them manage the access you provide

This program assumes basic experience with Lumens.

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 an opportunity to check your knowledge retention and is designed to review new content.

Company Profiles

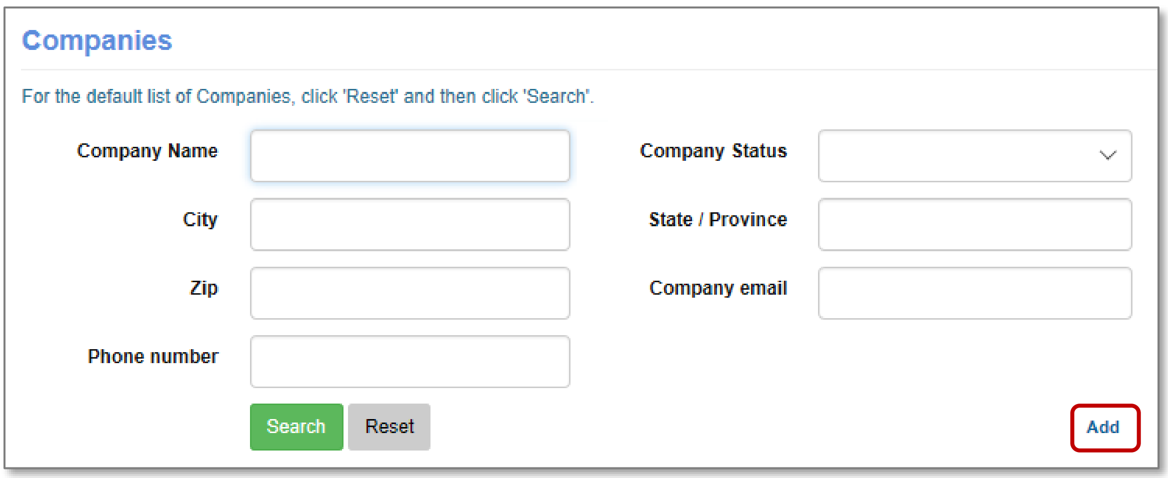
Company Information

Objectives for Company Profiles:

- Create the Company Information
- Define the Contact Names
- Determine Division Creation

This is the essentials or basics, of Contract Training. You need Company profiles to begin creating Classes and assigning Students.

Access *Contact Training* > ***Companies*** click *Add*



<u>Information:</u>

You can use the following information when choosing to pay for a Class created for a company in your staging site.

- Visa (mock account)
- 4111111111111111 (that's a total of 15 - 1's)
- Expiration date – any future date will work - MMYY

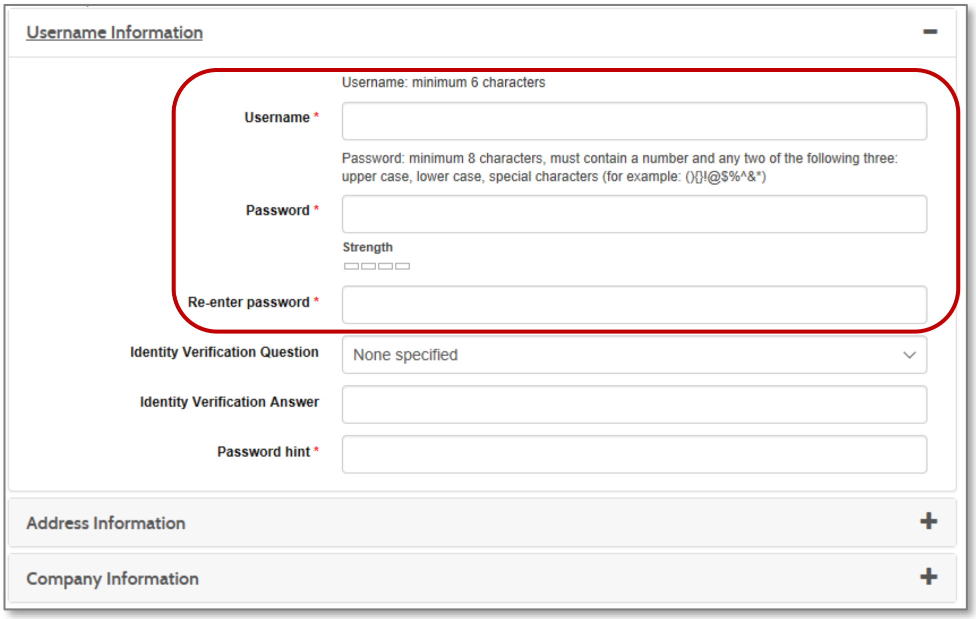
<u>Ripple Effect:</u>

Staff must create the Company profile. Lumens does not automatically notify the Company of their login credentials; this information must be communicated to the Company through an Organization Staff member.

Company Profiles

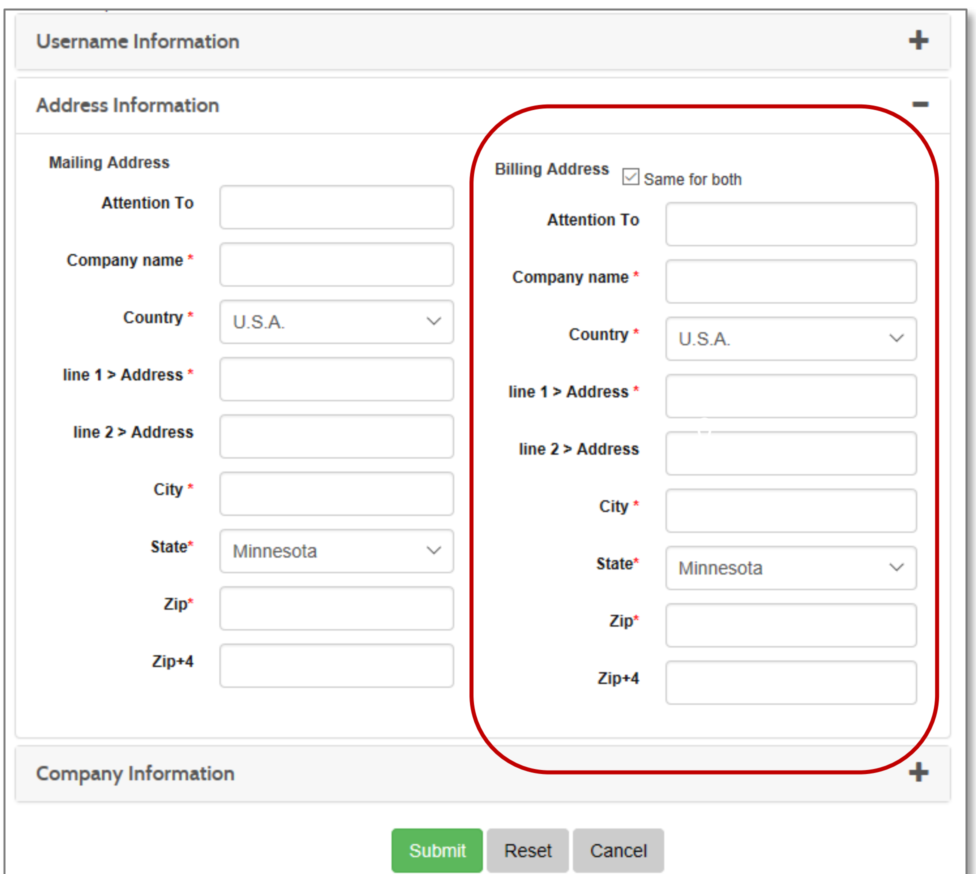
Company Information - Continued

Create a company profile.



Username and password are required

(even if you choose not to have the Company access Lumens).



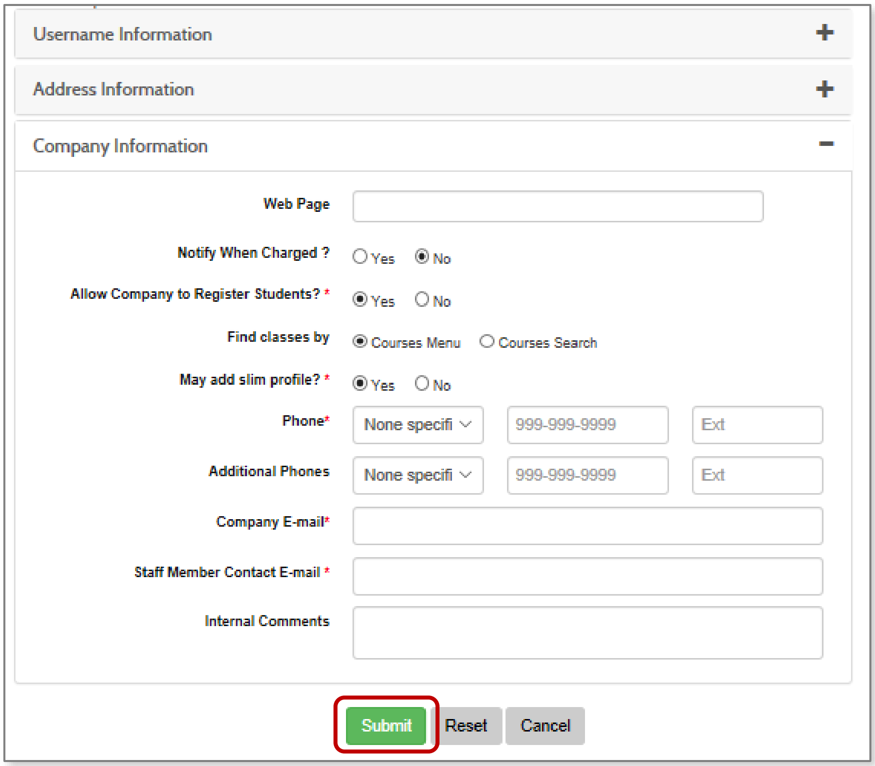
Company name will be used in drop down lists and search criteria.

If Company mailing and billing address are the same, enter the mailing address first then click, *Same for both*.

Using the *Attention To* field can be helpful.

Company Profiles

Company Information - Continued



Notify When Charged: Will automatically inform the Company email address when a CT Class is charged to the Company in their accounts receivable.

Allow Company to Register Students: Applies to open enrollment Class registration.

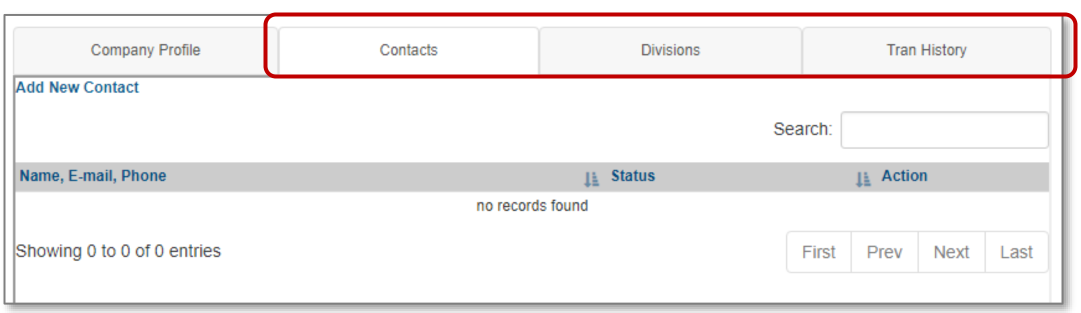
Company Email: is a primary email address for the Company.

May Add Slim Profile?: if Slim Profiles are active, this allows Company to add a slim profile.

Staff Member Contact Email: is the individual in <u>your</u> organization who owns the relationship with the Company (sales person).

Click *Submit* when all required fields are completed.

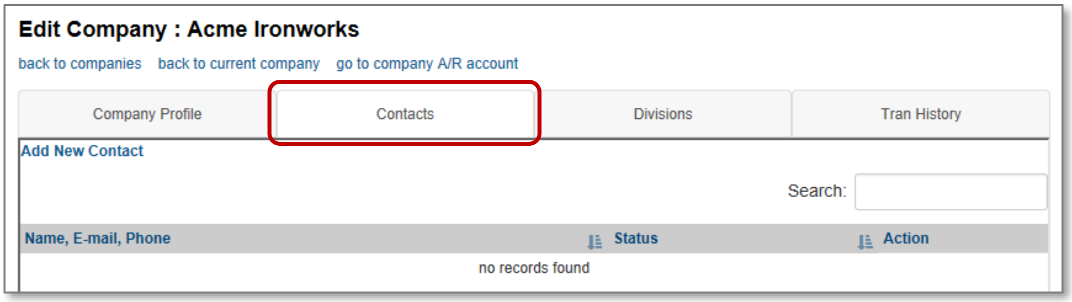
Once Submit is chosen, the following tabs will appear; Contacts, Divisions, Trans History.



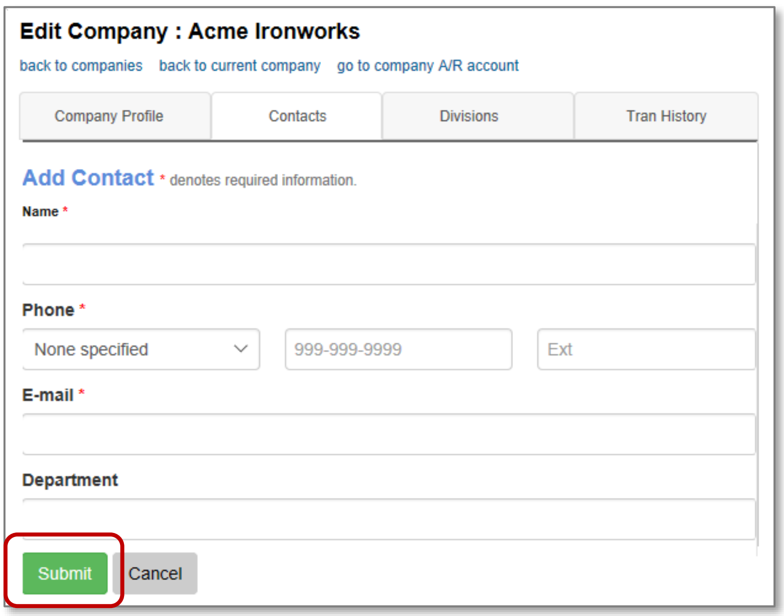
Company Profiles

Company Contacts

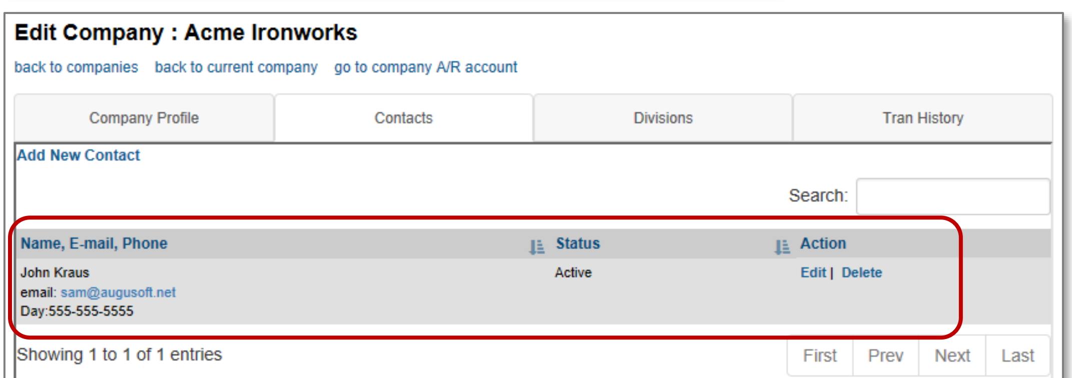
Create Company Contact:



Choose the Contacts tab and click on *Add New Contact.*



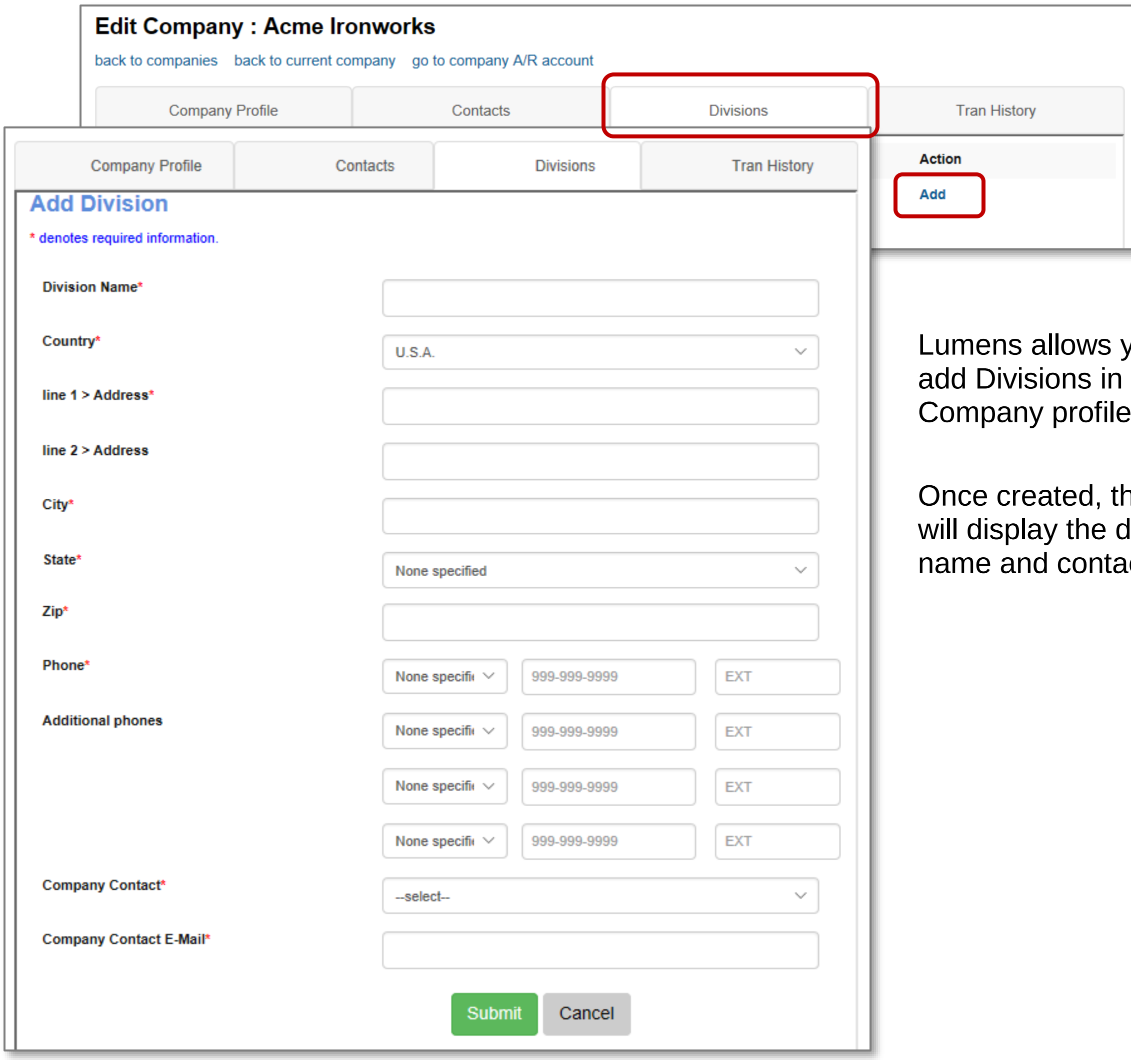
Enter name, phone number and email address. Click, *Submit.*



You many add multiple contact names. The names will display in a drop-down contact list associated with each Company.

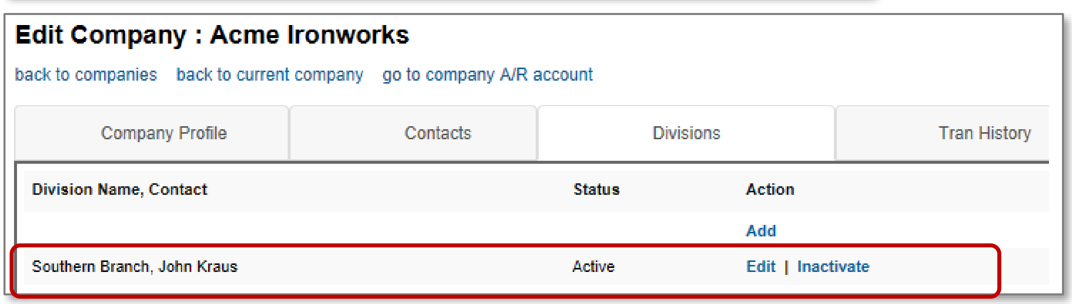
Divisions are an optional way of dividing sectors of a Company.

Access *Contract Training* > ***Companies*** Click *Edit* and select the *Divisions* tab. Click *Add* to add a new Division.



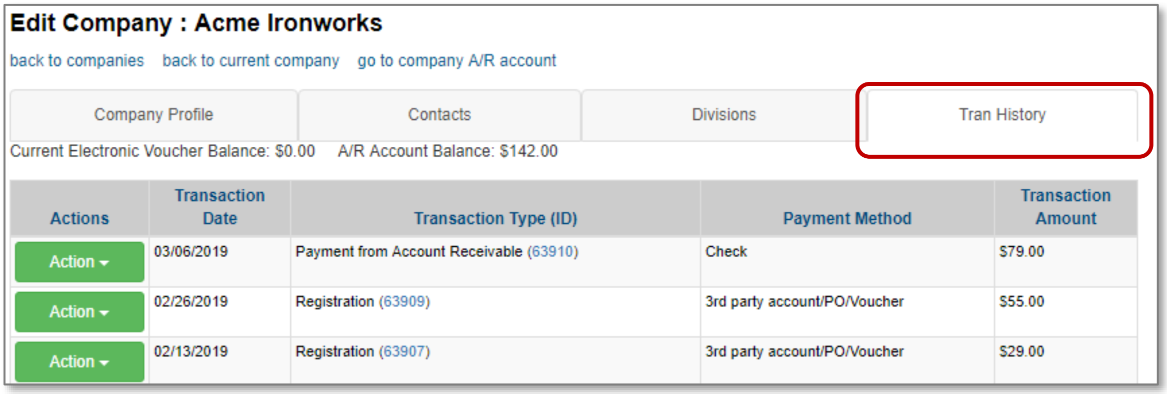
Lumens allows you to add Divisions in the Company profile.

Once created, the view will display the division name and contact email.



Company Profiles

Company Transaction History



Edit Company : Acme Ironworks

back to companies   back to current company   go to company A/R account

Company Profile | Contacts | Divisions | Tran History

Current Electronic Voucher Balance: $0.00   A/R Account Balance: $142.00

Actions	Transaction Date	Transaction Type (ID)	Payment Method	Transaction Amount
Action	03/06/2019	Payment from Account Receivable (63910)	Check	$79.00
Action	02/26/2019	Registration (63909)	3rd party account/PO/Voucher	$55.00
Action	02/13/2019	Registration (63907)	3rd party account/PO/Voucher	$29.00

Staff and Company representatives have access to the Company's transaction history to review what payments have been made.

Each transaction has a print view option (action button). If the Company has an Electronic Voucher and/or an AR (Accounts Receivable) Account Balance, each will display above the transaction listings.

Try It!:

Create a Company with at least one contact name.

Example:

- Create Workforce Services, 132 Main St, Anytown and (your state and zip)
  – OR -
- Create a profile for an existing company.

Lumens staging site email functionality works; therefore, do not enter real email addresses in staging. Use your personal email address to receive the message created for the company.

Document the Company you entered:

- Company Name ______________________________
- User Name and Password ______________________________
- Contact Name ______________________________

Ripple Effect:

When working with multiple organizations with the same name, we recommend creating a Company profile for each location if they prefer to be billed separately or act as separate entities. When defining the naming convention, we suggest using name and street or location (for example: "Workforce Services on Summit").

Contract Training Classes

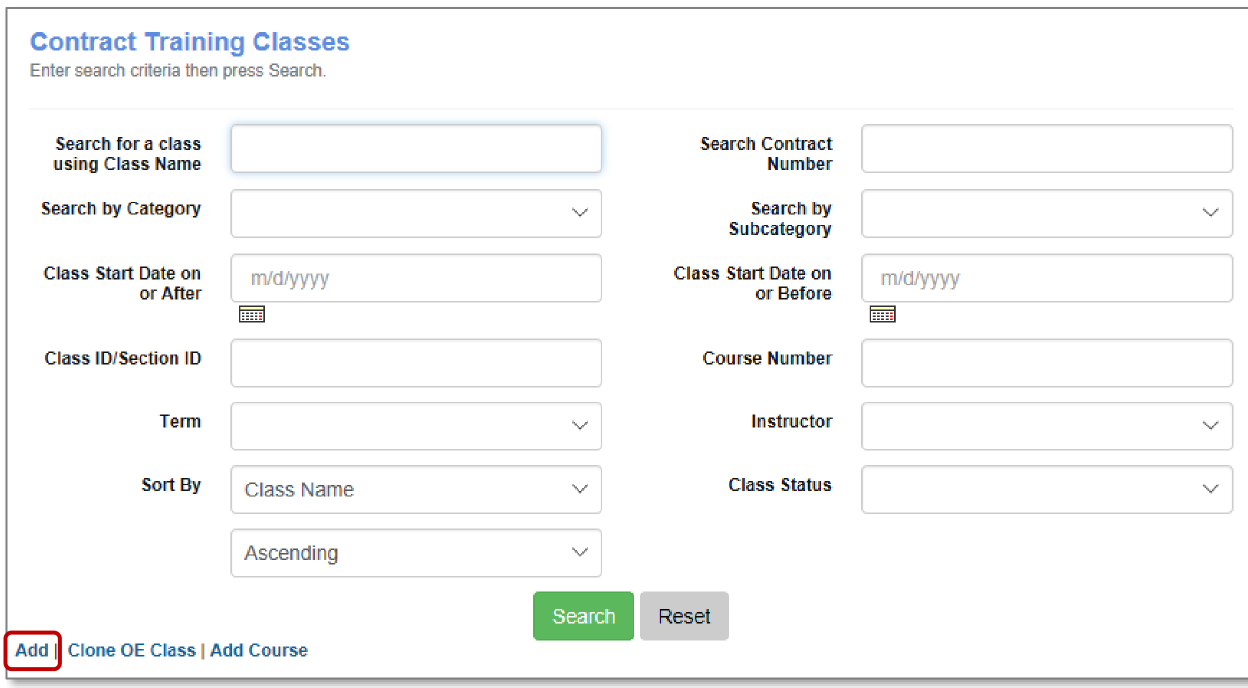
Adding a Course

Objectives for Contract Training Classes:

- Review Course Creation
- Create CT Classes
- Assign Students to CT Classes
- Discuss Rosters & Sign in sheets
- Demonstrate Charging the Class to the Company

Once you have a Company created, the goal is to be able to document the programs you will offer them easily and to assign applicable attendees to these programs (classes). This section of the workbook will focus on the creation of CT Classes.

Access *Contact Training* > ***Classes*** click on *Add*
Or *Clone OE Class* to clone an existing open enrollment Class *or Add Course* if neither has been built. Adding a Course here will allow it to show up in the Course Management section.

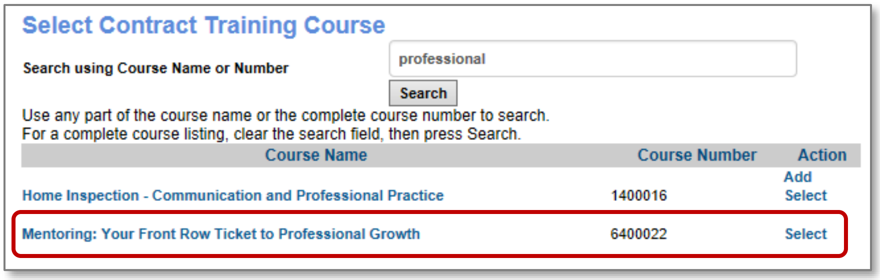


<u>Ripple Effect:</u>
To create a CT Class, just like Open Enrollment (OE) Classes, you must have a Course. A Course is not <u>defined</u> as either an OE or a CT Course. Courses can be associated with either or both OE and CT Classes.

Contract Training Classes

Adding a Course - Continued

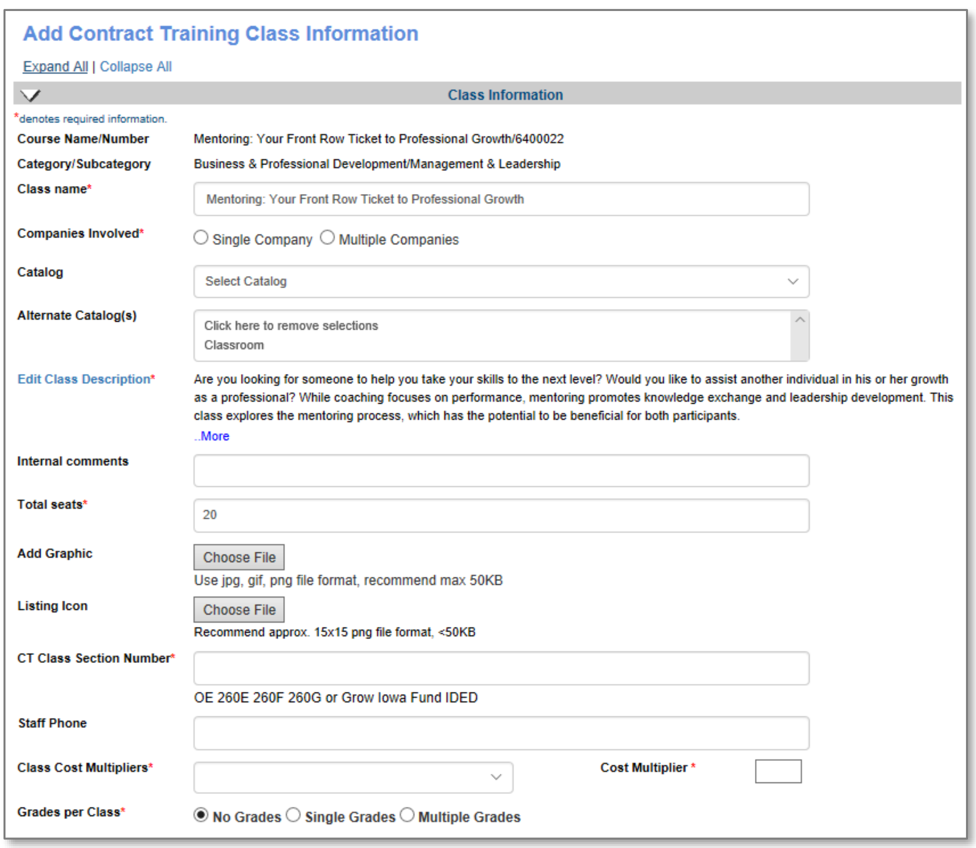
Click *Add* and the list of existing Courses will display. You can enter the Course Name or Number in the search view to narrow your options.



Click *Select* when you locate the applicable Course.

You may find it easier to create a generically named location for customer sites at the time of Class creation; alternatively, a Class may be saved as a draft until you have the needed details.

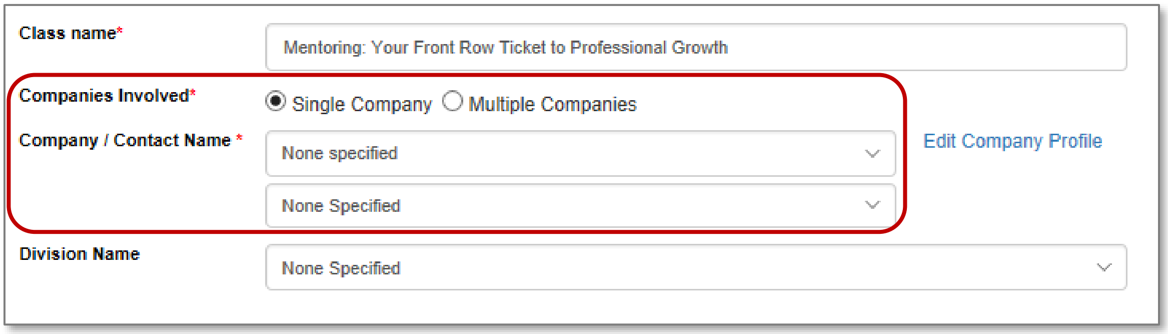
Courses are assigned to a Category and Subcategory. If you wish to change, this requires the creation of a new Course.



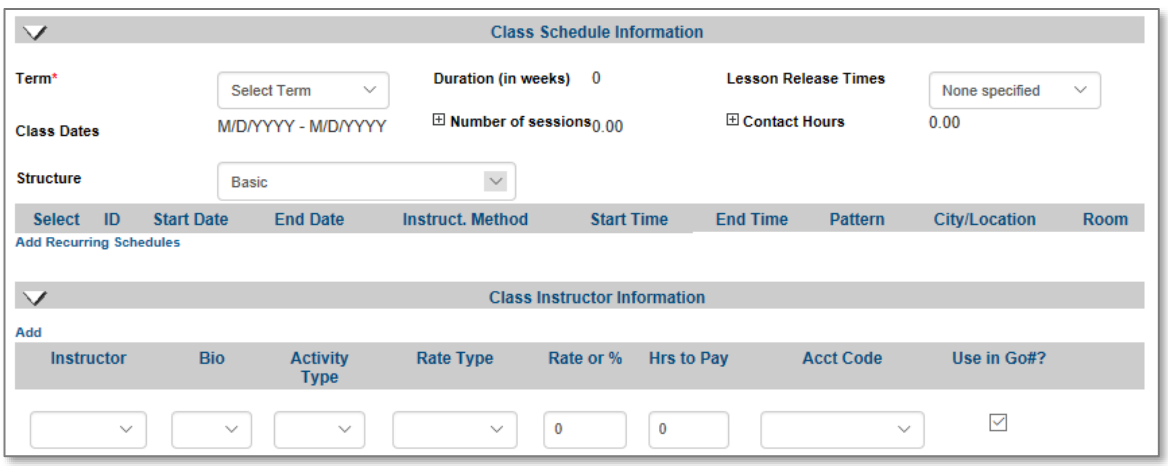
Contract Training Classes

Class Creation

You must associate a Company with the CT Class before you can assign a Student.

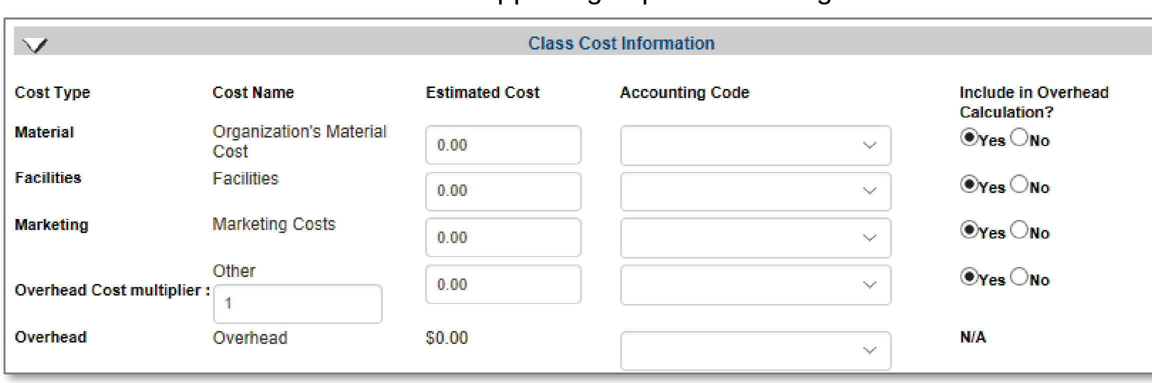


Add the details needed for the schedule (reminder, a location may be a company location. If so, creation of a generic location such as 'Company Site' can be effective). Class Contact Hours and other details can be adjusted.



Add an Instructor, this information can be edited later if you aren't certain who will lead the Class at the time of setup.

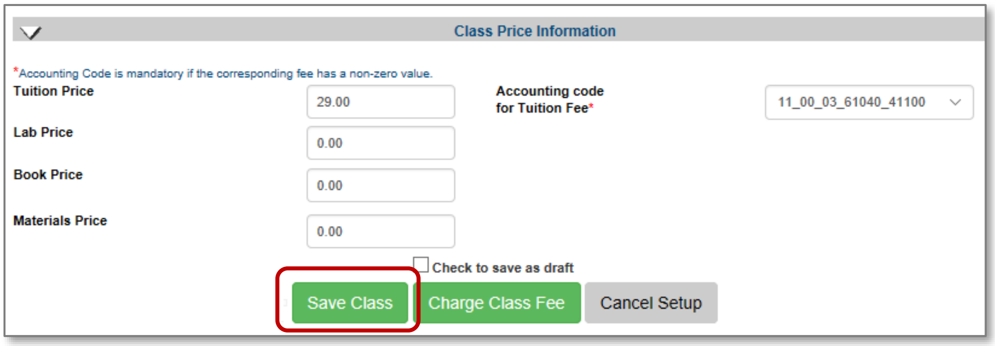
Class cost information can assist in supporting expense tracking.



Contract Training Classes

Class Creation - Continued

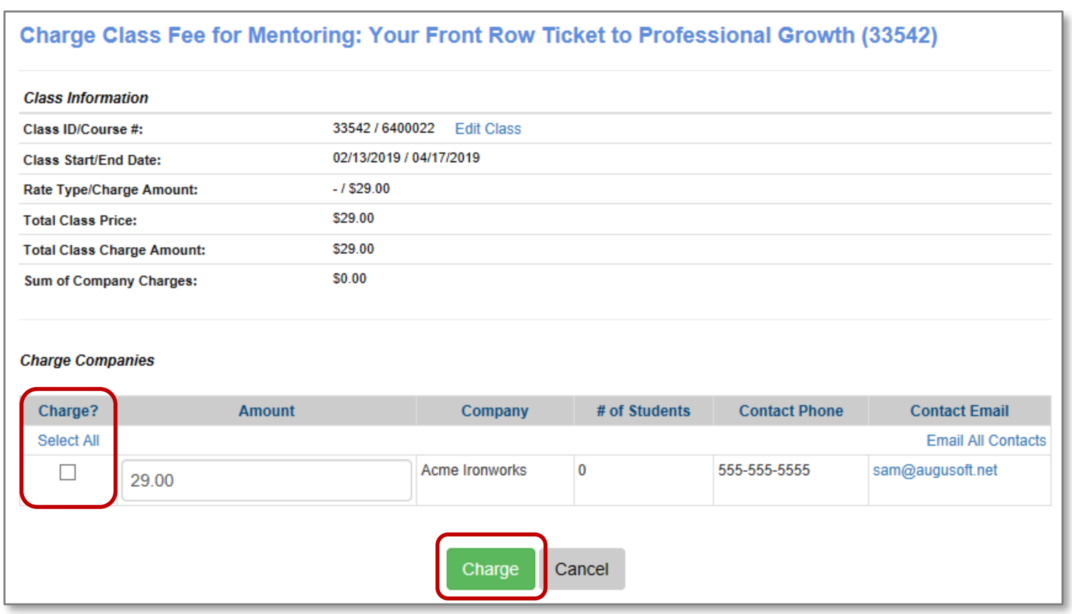
Tuition Price for Class is total Contract cost. If accounting codes are active for classes, you can modify the accounting codes for the CT class.



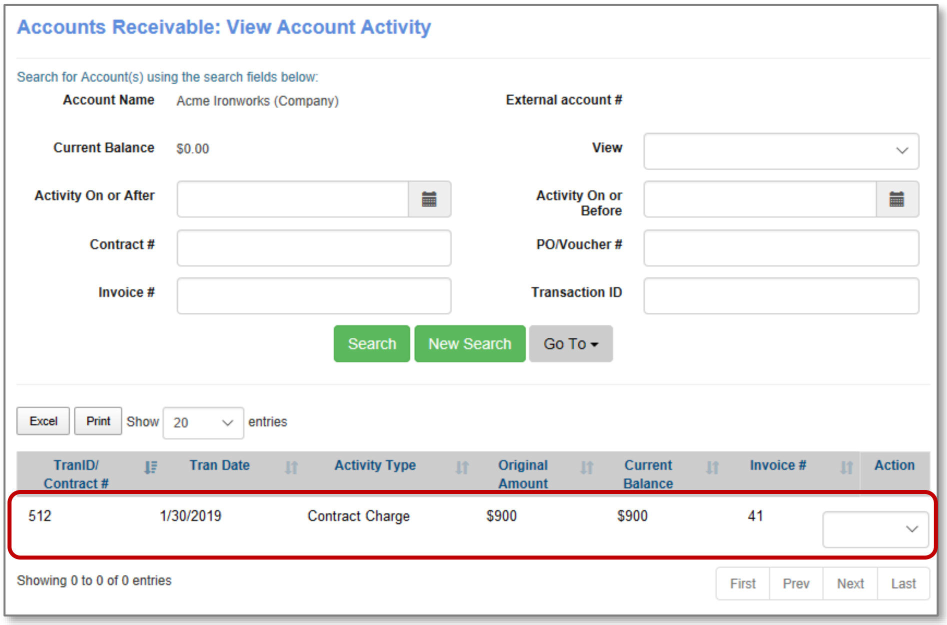
Save the class to add students/employees to the class.

<u>Information</u>:
You may choose to have CT Courses availble for use in building CT classes. You can set up these courses specific to CT programs and lesaving the tuition at $0.00 to be modified for each contract.

Choosing ‘Charge Class Fee’
Classes can be invoiced to a Company when a charge is created. Invoice process is the same as 3rd party invoice except the charge is a Contract Charge rather than an OE Charge.



Financial Mgmt > Acct Rec Mgmt locate the Company and select *Account Activity.*



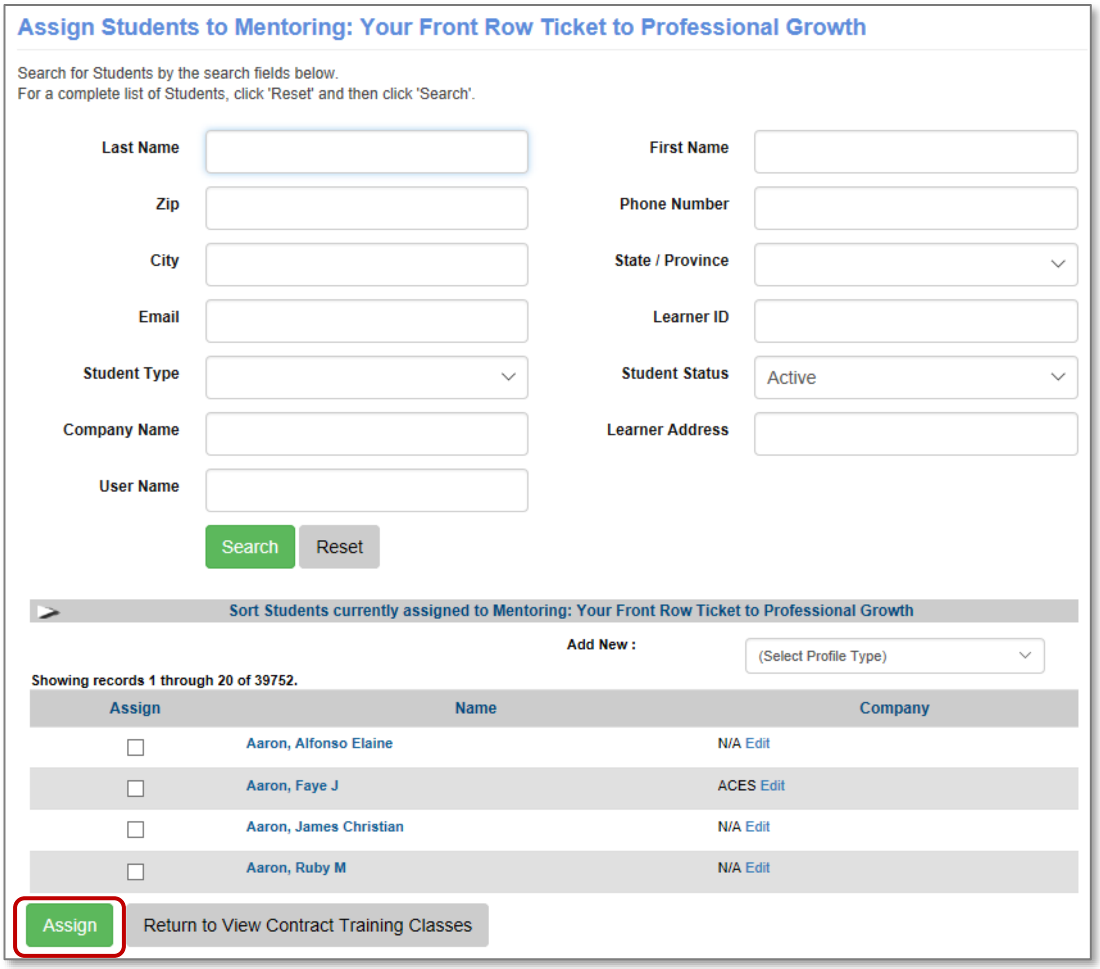
To invoice the Class (or Classes), click on Charge Class Fee and an Accounts Receivable (AR) record will be created. The charge will appear as a Contract Charge. CT Classes are not viewable on the Courses / Classes page.

CT Classes are located in *Contract Training > Classes*. The Class will not be listed in the *Course Mgmt > Courses / Classes* (that is for OE Classes).

Edit: Class can be edited.
Assign Students: Students are assigned rather than registered.
Cancel: Class can be cancelled.
View Roster: Displays roster based on assigned Students.
Print Roster: Ability to print out roster.
Sign in Sheet: Ability to print out sign in sheet.
Clone: Class can be cloned and used again for same or different Company.

Assign Students

Contract Training > ***Classes.*** Select the Class and click *Assign Students.*



The list will display all Student names. Search options include locating by Company name. If Student is associated with a Company, he / she will display using that search criteria. Any Student profile can be assigned to a CT Class. They do not need to be associated with the Company nor be a CT Exclusive profile.

When you select more than one Student, make sure you click on the *Assign* button before clicking to the next page. Otherwise, the selected Students will not be assigned to the Class. If the Student is not on the list, he / she can be created.

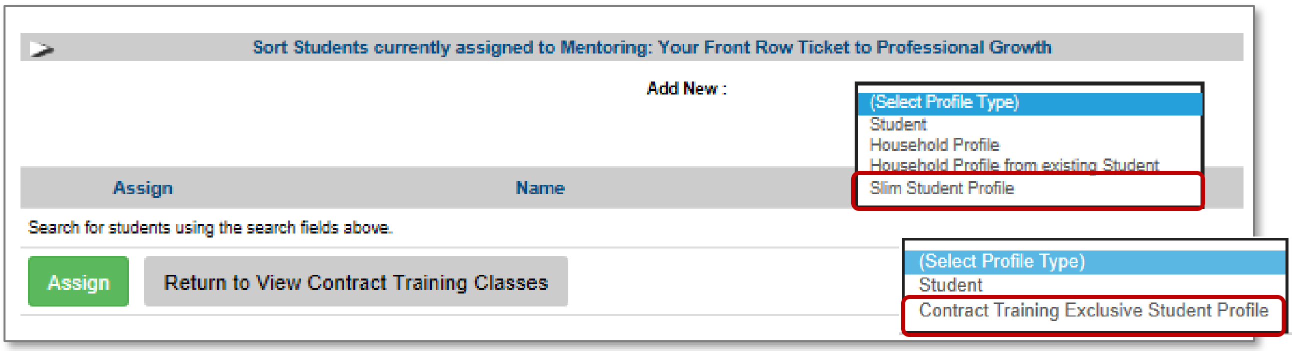
Ripple Effect:

Standard Student profiles can have Students associated with a Company, which can make locating applicable Students easier.

Contract Training Classes

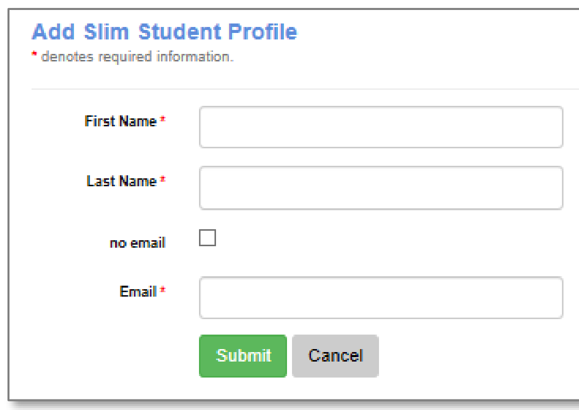
Assign Students – Continued

If you need to add a new Student, you can do so. You may click *Add New* to create a new profile. You will either see an option to add a Contract Training Exclusive profile or a Slim Student Profile, depending upon whether you have Slim Profiles activated or not.



Contract Training profiles do not require an email or password as the Student will not be managing them. Only Program Staff and Company Representatives will manage their activity. Slim profiles require, at minimum, a first / last name and can be later converted into a Student profile. Power Users can add additional fields as desired. Optional / Custom fields can apply to a CT Exclusive profile if necessary.

You may also add a Student Profile, or a traditional open enrollment profile or a Household Profile, if that is activated or appropriate.

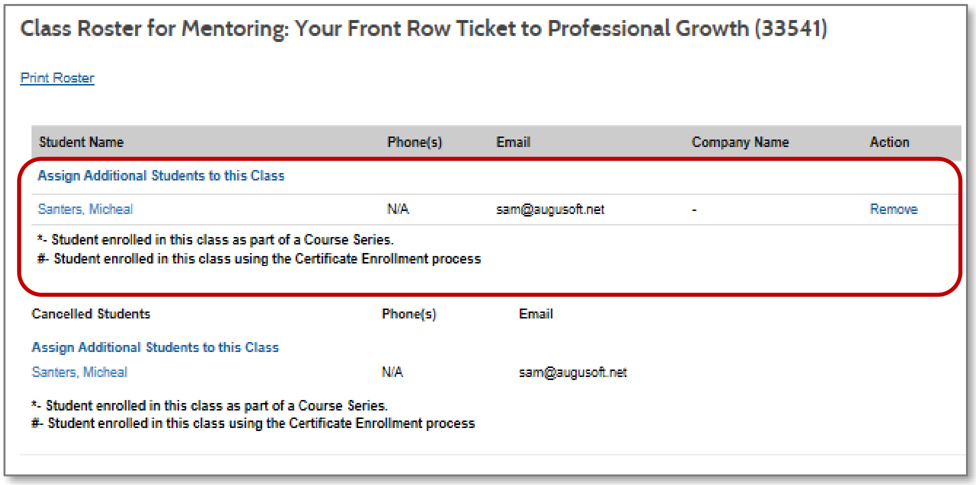


<u>Ripple Effect:</u>
If Slim Profiles is activated, Contract Training Exclusive profiles will not be available.

Contract Training Classes

Assign Students – Continued

Students assigned or removed will be tracked in the Class Roster.



Class Roster includes registered / assigned and cancelled / removed Students.

Class date and other Class specifics will display.

Class fee is the tuition amount listed for the Class – Contract price.
Continue to Add / Assign Students from this view or back at the assign Students view.

Question:

Would you allow your Companies to assign their own Students?

____

____

Try It!:

Create a Class using your current Course offerings.

- Create a Class
- Give the Class a price of $1500.00
- Charge the Class Fee (after creation or edit later)
- Assign Students
- Review the roster

Retention Activity:

Look over your current Course offerings. Are they easily converted (cloned) to a Contract Training Class? Or do you need to revise your Categories and Subcategories?

Contact Log

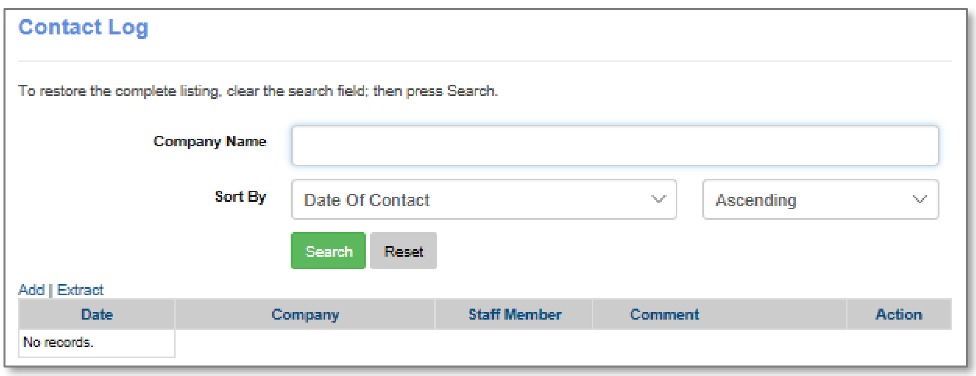
Contact Log Creation

Objectives for Contract Training Contact Log:

- Create a Contact Log
- Run an extraction of a Contact Log

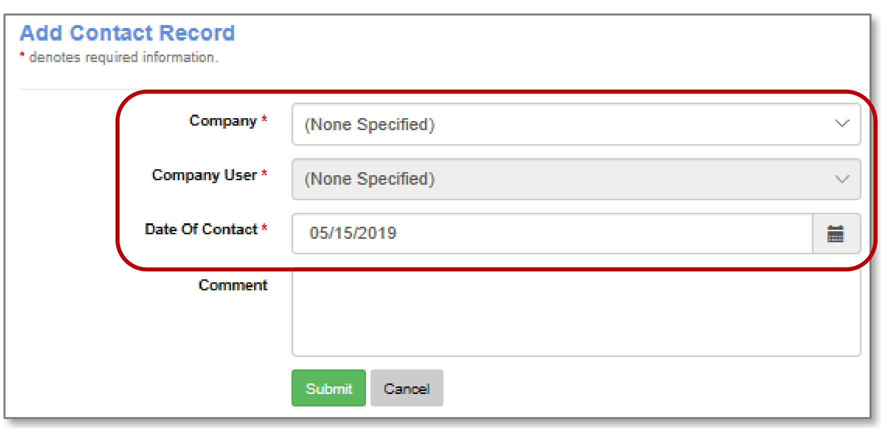
In the prospective stage of soliciting a new Company for contract, Sales Staff traditionally make notes regarding the contact they have with a Company. Once that Company is created in Lumens, you can begin to create a Contact Log as a simple means of tracking the communications that have occurred.

Access *Contract Training* > ***Contact Log*** click *Add* to log a new entry.



Required fields are:

- Company Name
- Company User
- Date of Contact

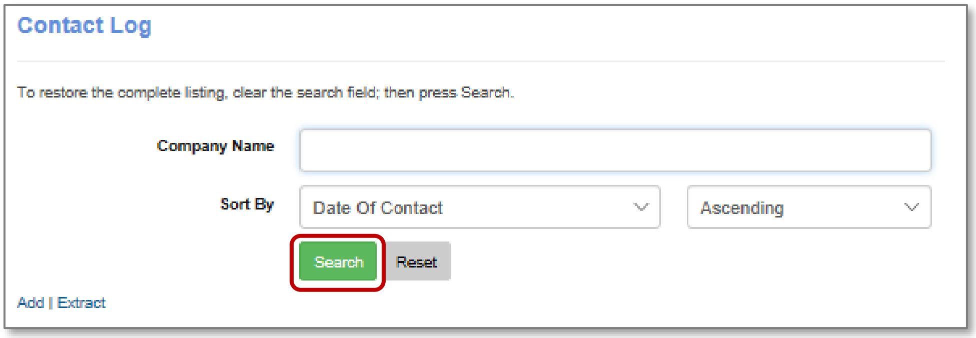


Company Logs may be edited.

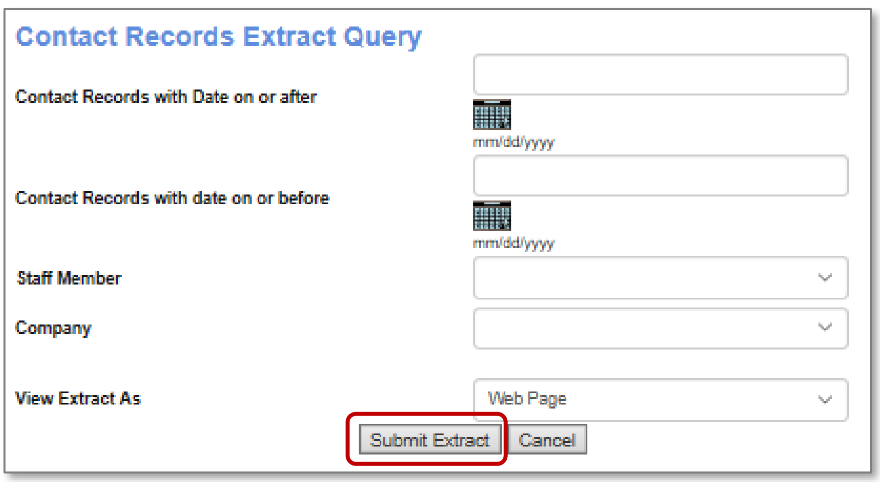
Contact Log

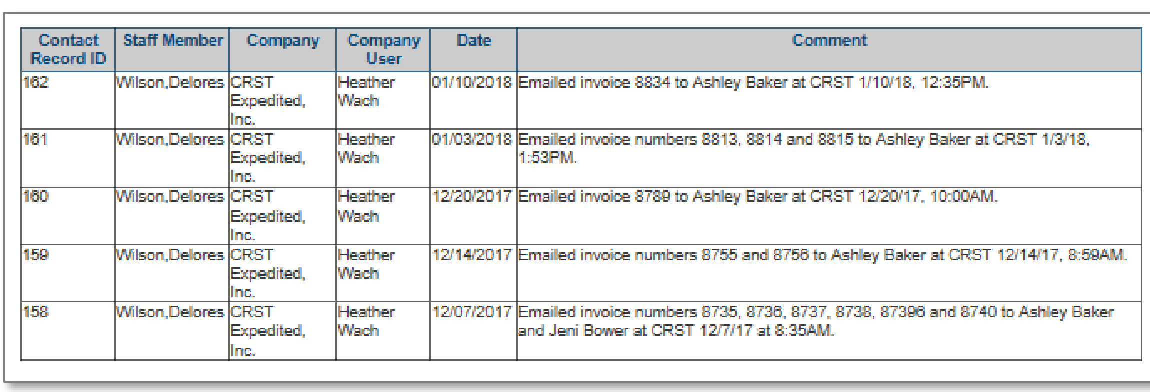
Contact Log Extract

Access *Contract Training > Contact Log* click on *Submit Extract.*



No fields are required. Filter by defining a date range, choosing a Staff member who entered the log, Company and choose extract format.





Contact Record ID	Staff Member	Company	Company User	Date	Comment
162	Wilson,Delores	CRST Expedited, Inc.	Heather Wach	01/10/2018	Emailed invoice 8834 to Ashley Baker at CRST 1/10/18, 12:35PM.
161	Wilson,Delores	CRST Expedited, Inc.	Heather Wach	01/03/2018	Emailed invoice numbers 8813, 8814 and 8815 to Ashley Baker at CRST 1/3/18, 1:53PM.
160	Wilson,Delores	CRST Expedited, Inc.	Heather Wach	12/20/2017	Emailed invoice 8789 to Ashley Baker at CRST 12/20/17, 10:00AM.
159	Wilson,Delores	CRST Expedited, Inc.	Heather Wach	12/14/2017	Emailed invoice numbers 8755 and 8756 to Ashley Baker at CRST 12/14/17, 8:59AM.
158	Wilson,Delores	CRST Expedited, Inc.	Heather Wach	12/07/2017	Emailed invoice numbers 8735, 8736, 8737, 8738, 87396 and 8740 to Ashley Baker and Jeni Bower at CRST 12/7/17 at 8:35AM.

Contract Training Reports

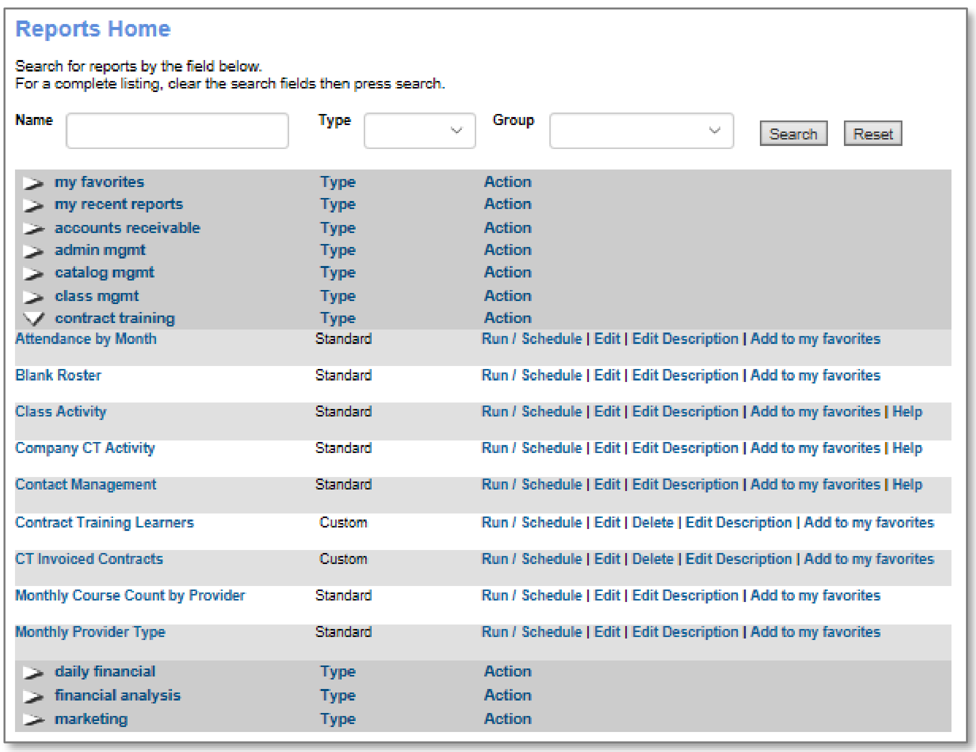
Reports

Objectives for Contract Training Reports:

- Review available reports
- Run examples of reports

Contract Training requires tracking. You want to track how well your Contract Training business is doing. You should also be able to track any given Company. Lumens provides reports that will help you keep track of these numbers.

Access the meu option *Reports* > ***Contract Training***



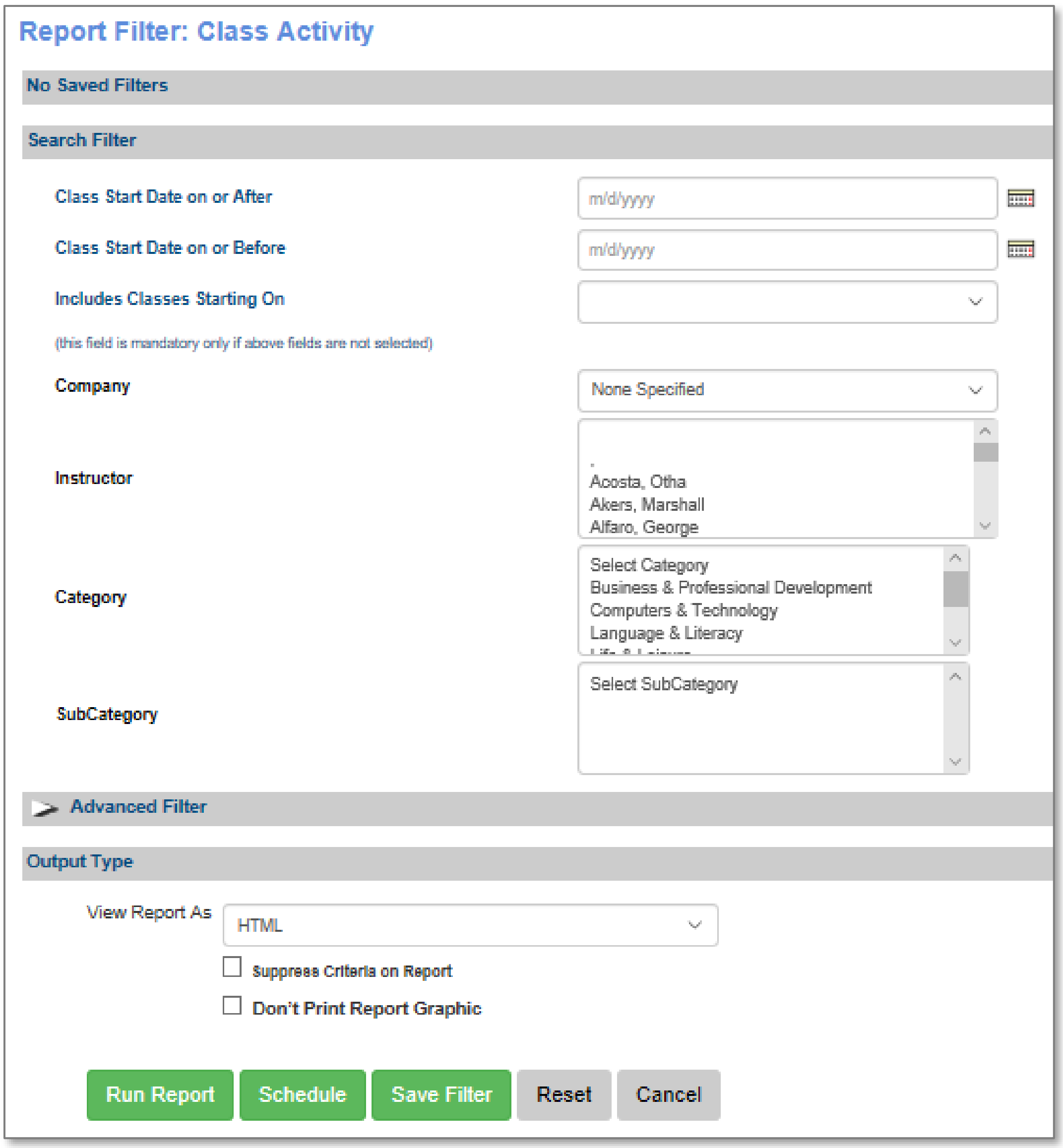
Try It!:
Take a few minutes and look at the contract training reports before we review them together.

Retention Activity:
Once you have built some sample data in your staging site, look over the reports available and the edit field for additional information you may need. Look at what you need for reports to properly track progression of a relationship.

Contract Training Reports

Reports – Class Activity

Reports > ***Contract Training*** Click on *Run / Schedule* for Class Activity.


Report Filter: Class Activity

No Saved Filters

Search Filter

Class Start Date on or After m/d/yyyy

Class Start Date on or Before m/d/yyyy

Includes Classes Starting On

(this field is mandatory only if above fields are not selected)

Company None Specified

Instructor
Acosta, Otha
Akers, Marshall
Alfaro, George

Category
Select Category
Business & Professional Development
Computers & Technology
Language & Literacy

SubCategory
Select SubCategory

Advanced Filter

Output Type

View Report As HTML

Suppress Criteria on Report

Don't Print Report Graphic

Run Report | Schedule | Save Filter | Reset | Cancel

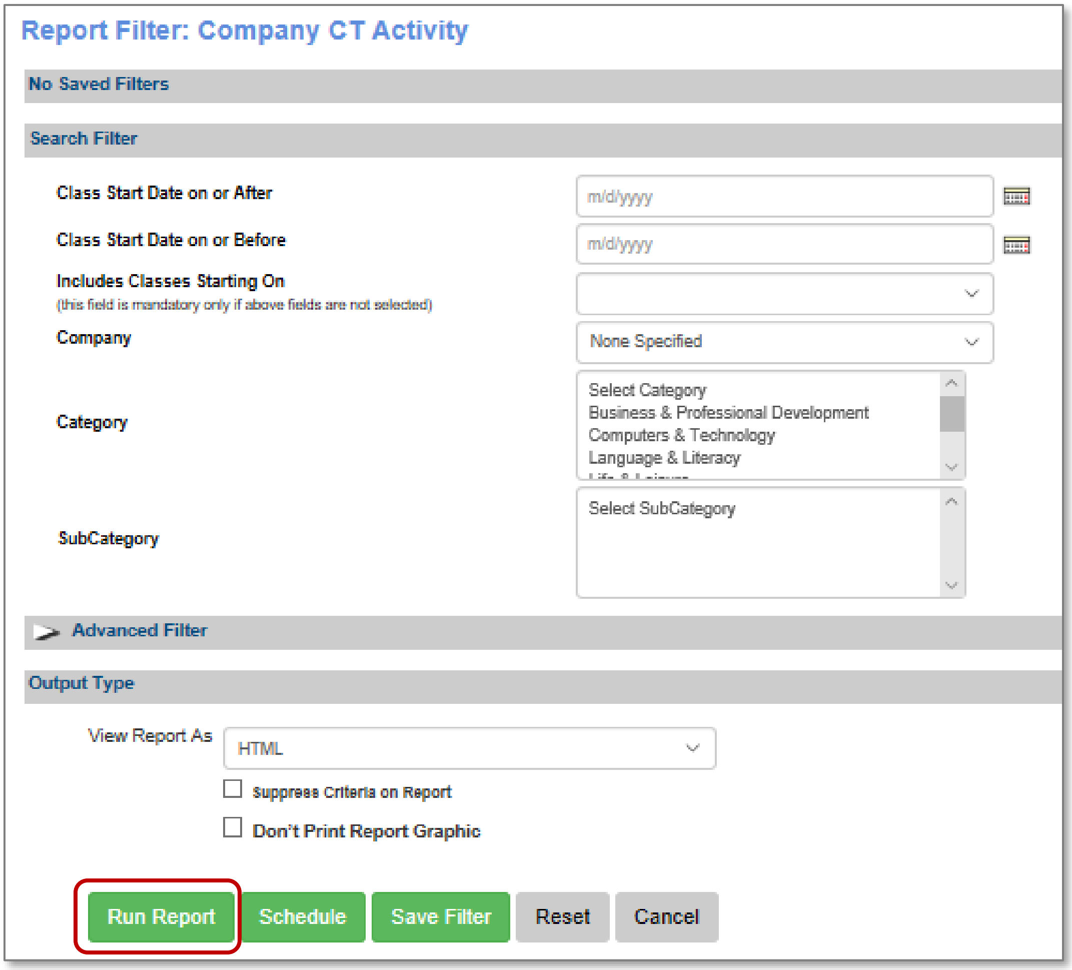
The report is created based on Class start dates because the report is organized around the Classes. This report can be filtered by individual companies. Staff owners of Companies may want to receive these reports on a regular basis for the company he / she manages. Remember, you can schedule this report.

The information in this report is similar to a Class activity report in open enrollment it includes, but isn't limited to: Class profile data, financial codes and number of Students assigned.

Contract Training Reports

Reports – Company Contract Training Activity

Reports > ***Contract Training*** Click on *Run / Schedule* for Company CT Activity.



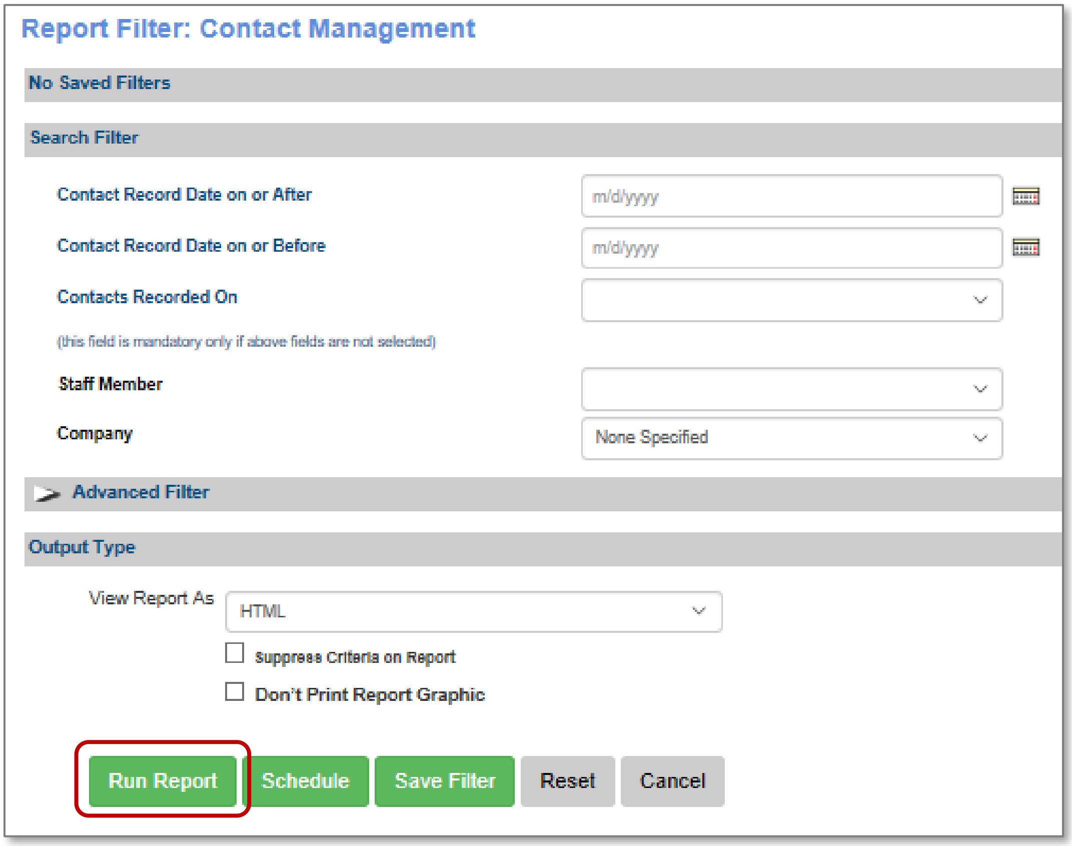
This report can be run without any filters, which will provide all the details for all companies and data in your site. It is a summary per company with the number of active proposals and contracts, total contract amount, number of Classes provided per company and the number of Students served.

<u>Information:</u>
You may want to run this with no date ranges but filter by Company. All the activity for any given company is returned.

Contract Training Reports

Reports – Contact Management

Reports > ***Contract Training*** Click on *Run / Schedule* for Contact Management.



Contract Management Report is a register of Staff communications with a Company and its assigned contact(s). It incorporates date search criteria and optional Staff member and / or Company selections.

If you are tracking your communications with any given organization, you can run this report to determine last contact and review what was documented or determine if a follow up action is needed. In addition, you can filter this by Staff members, which allows you to locate just the information for a particular sales person.

Contract Training Reports

Reports – Additional Contract Training Reports

Navigate to Reports > ***Contract Training*** for additional reports available for Contact Training.

Attendance by Month: is designed to provide Staff with attendance information summarized at the Course level for all CT Classes that start within a given month.

Attendance by Month

Report Criteria	Value
Classes in Term:	Spring 2019

March 2019

Course Name	Pre-Reg	Walk-Ins	No Shows	Total Attended
Mentoring: Your Front Row Ticket to Professional Growth	14	2	0	16
Total	**14**	**2**	**0**	**16**

February 2019

Course Name	Pre-Reg	Walk-Ins	No Shows	Total Attended
Mentoring: Your Front Row Ticket to Professional Growth	26	3	1	28
Total	**26**	**3**	**1**	**28**

Monthly Course Count by Provider: is designed to provide Staff with information on how many Students are being sent to CT Classes from each company within a particular month.

Monthly Course Count by Provider

Report Criteria	Value
Classes in Term:	Spring 2019

March 2018

Acme Ironworks

Class Id	Class Start Date	Class Name	Total Attended
33541	03/19/2018	Mentoring: Your Front Row Ticket to Professional Growth	1
Total			1

Monthly Provider Type: is designed to provide Staff with information about how many Students are being sent to CT Classes from Companies with a particular Provider Type.

Blank Roster: is designed to allow Staff to collect profile information for Students in CT Classes on the first session of the Class. Frequently, Students who will be attending a CT Class are not confirmed until the first meeting, so this report provides space for Instructors or Staff to collect Student information that can later be entered into Lumens.

Questions:

While looking at these reports, do you see uses in your business?

____

Would the sales team find this information valued for making data-driven decisions?

____

Company Access

Company Views

Objectives for Company Access:

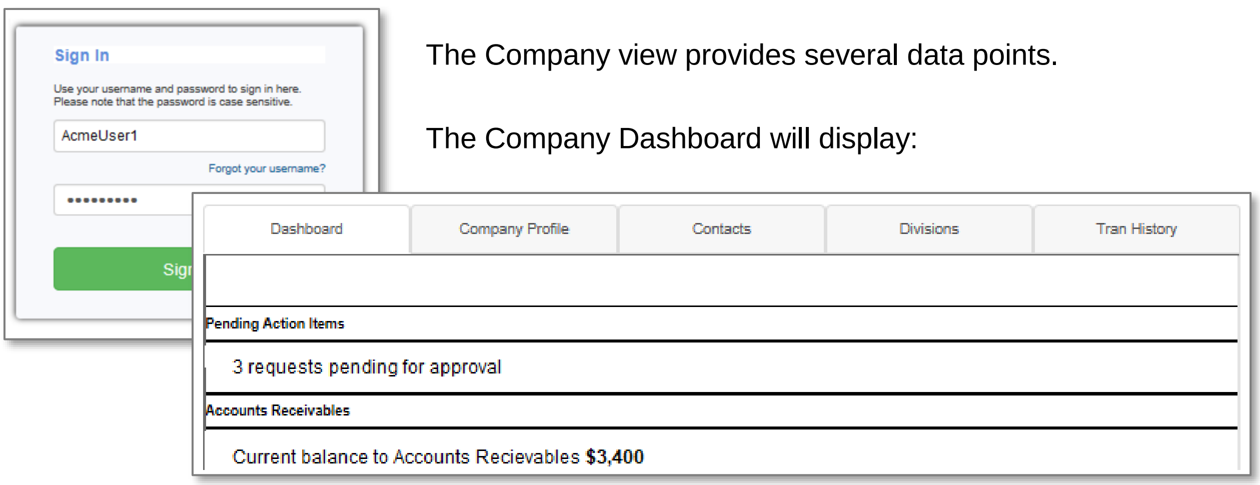
- Review Company Views
- Assign Students
- Discuss Report Options

Some organizations will choose to allow Companies to manage their own information to some degree. This section of the workbook will describe the features and functions available to a Company, <u>if</u> your organization authorizes the Company accessible.

Access the Sign In area on the homepage and enter Company username and password.

The Company view provides several data points.

The Company Dashboard will display:



- Pending Action Items: this is displayed <u>only</u> if you allow Students to request Companies pay for Classes (this information is part of 3rd party training).
- Accounts Receivable: the amount displayed is the total amount due your organization. The amount includes OE and CT charges.

<u>Try It!:</u>
Sign into your staging site using the Company profile you created.
What is your Company user name and password?

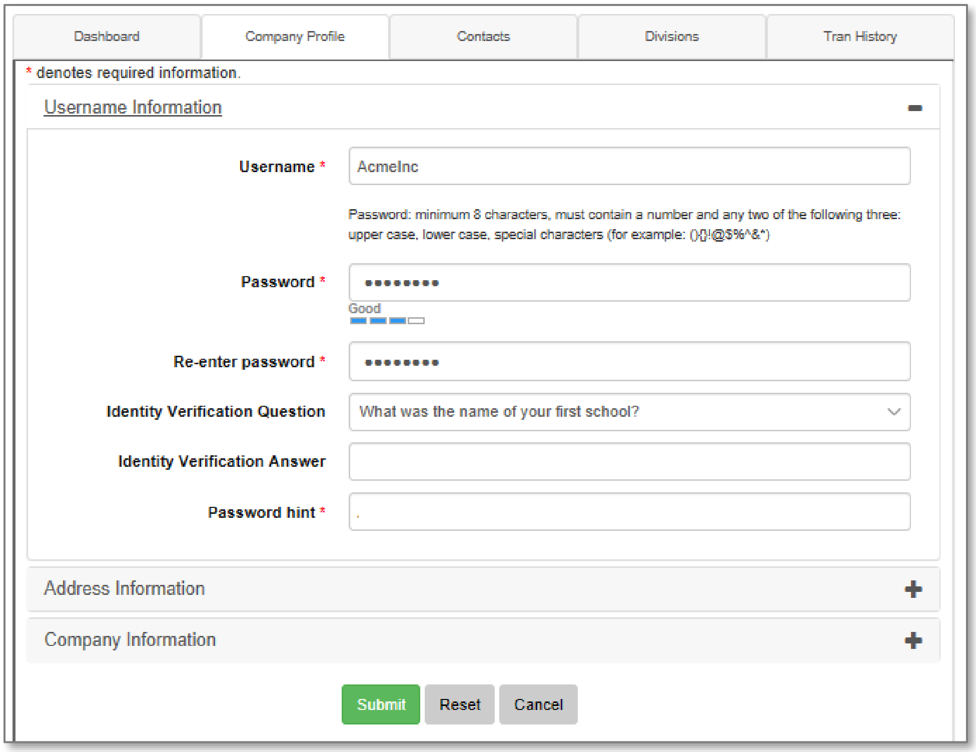
____

<u>Retention Activity:</u>
Take some time to familiarize yourself with the Company experience, especially before you allow your Companies to access.

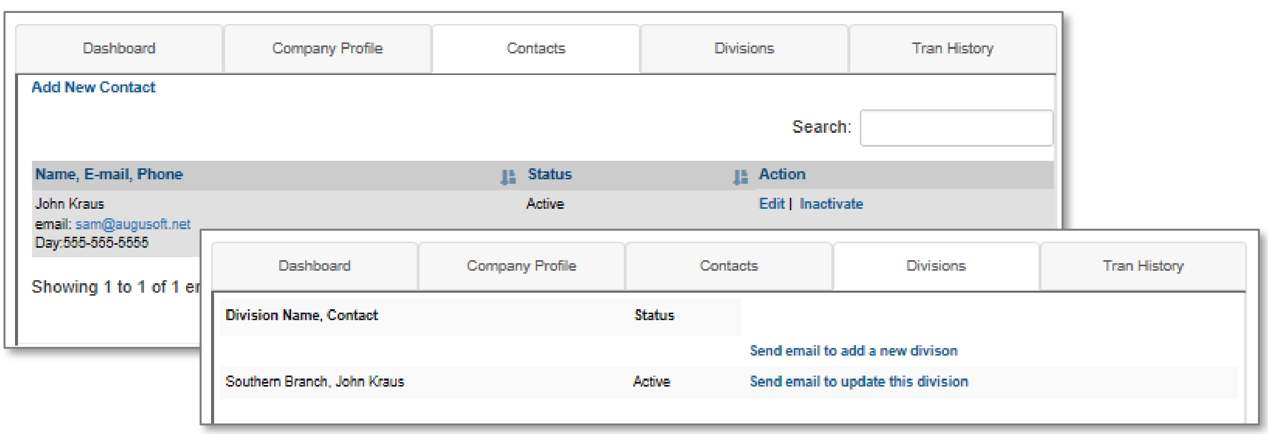
Company Access

Company Views - Continued

Company can update their profile. Staff will see all changes made in Staff views.



Companies can add more contacts and to create divisions. The expectations should be set with the Company regarding naming conventions and data you may need (for example: contact title listed with the contact name).

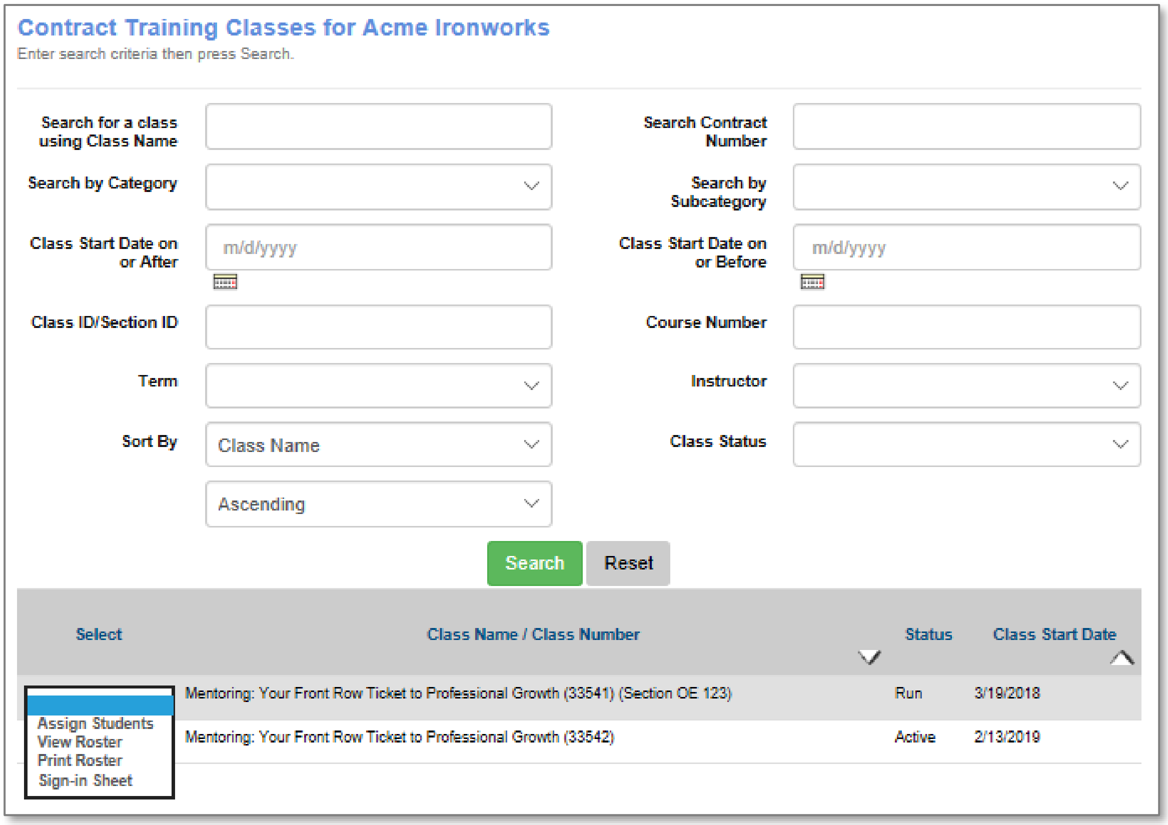


Company Representatives can also view their transactions history. Staff can see any changes the Company makes.

Company Access

Company Classes

Access ***Classes*** from the navigation panel.



The Classes view will display if the company has Contract Training Classes. The company will have the ability to assign Students that are currently associated with their Company.

The drop-down list related to each Class is:

- **Assign Students:** Allows a company to assign Students currently associated with them
- **View Roster:** Provide a roster of all Students currently assigned and one that have been removed from the Class.
- **Print Roster:** Provides print view of the Class roster.
- **Sign in Sheet:** Provides a printable version of the sign in sheet.

Class status does not affect drop down options. Contract number does not apply.

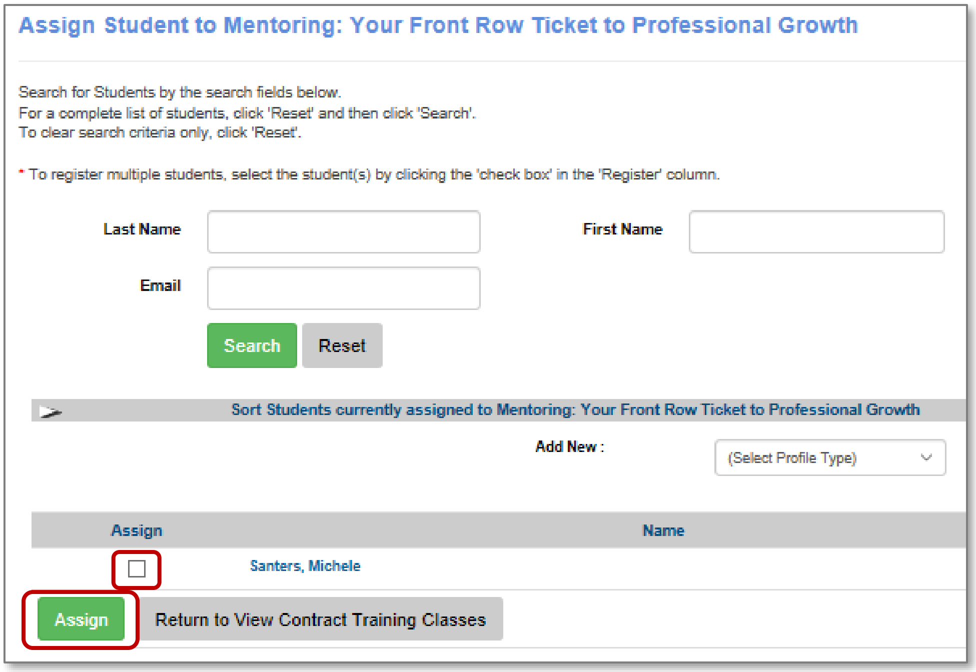
Ripple Effect:

When a CT Class is created, the Class becomes viewable by a Company with access.

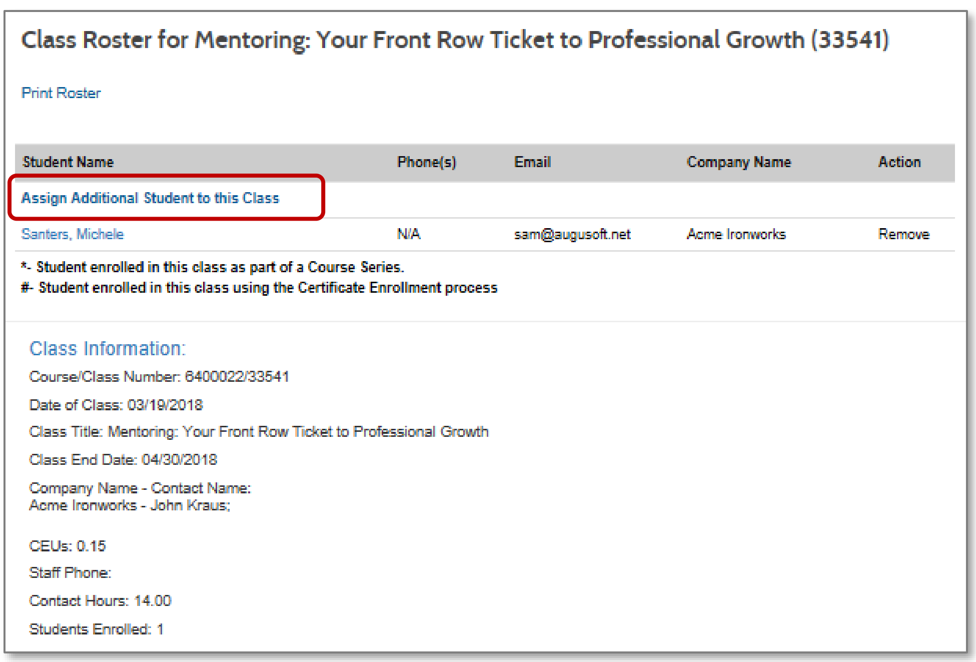
Company Access

Company Classes – Continued

Access ***Classes*** Select *Assign Students* from the drop-down menu next to the Class name.



Then search for a name or select from the list of Students and select the *Assign* checkbox and click *Assign.*



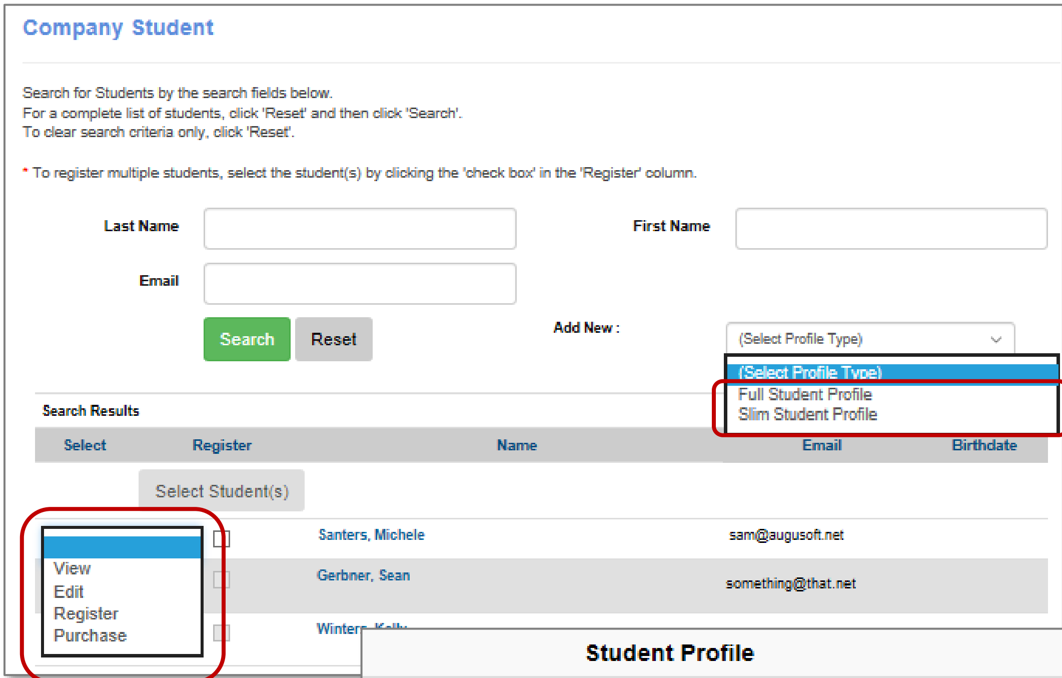
When a Company assigns Students, you are automatically navigated to the Class roster view. The ability to *Assign Additional Students to the Class* is available to continue to add Students.

Company Access

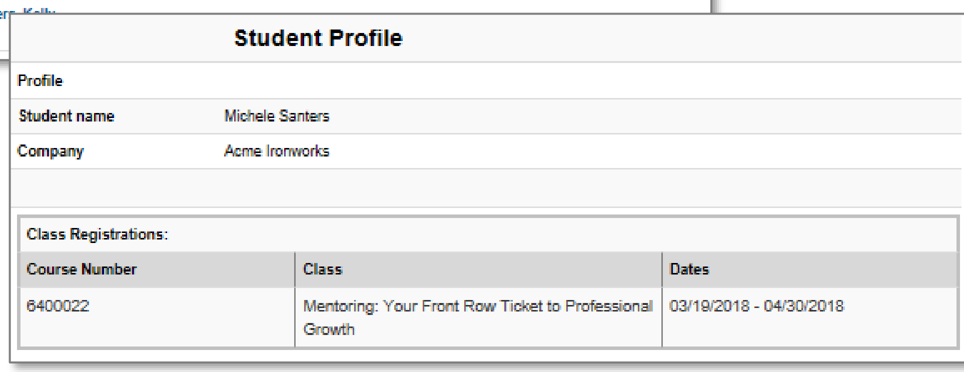
Company Students

Access ***Student*** select from the drop-down menu.

The Company can access the Student's profile to view Classes paid for by the Company. This includes both OE (Open Enrollment) and CT (Contract Training) Classes.



The Company has the option to create Full Student Profiles (or Slim Profiles if active).



First / Last name and email are required fields for Slim Profiles (unless no email is checked).

Information:

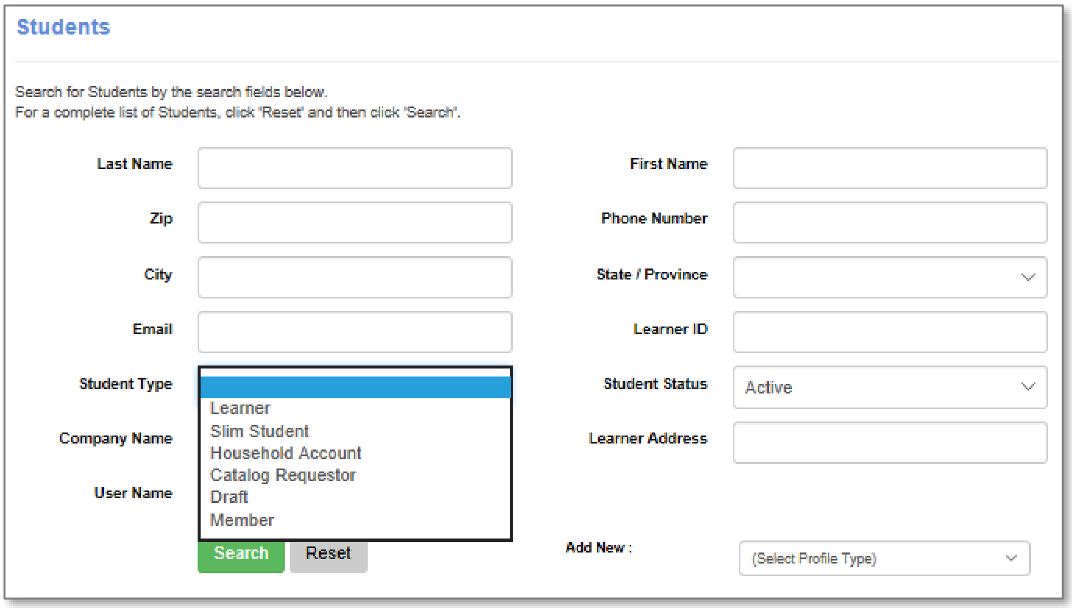
Slim profiles are automatically assigned to the company creating the profile. The Company can assign the slim profile immediately to the Class associated with their organization.

If the Company creates a Full Student Profile, the profile is set to a 'draft' status until the program staff member updates the profile to active.

Company Access

Company Students - Continued

Program Staff can view any full profiles created as a draft. *Access Students* > ***Student Management*** select *Draft* from the drop-down menu next to the Student's name.



A draft profile must be converted by a program Staff member with access to Student Management.

<u>Try It!:</u>
Create a draft profile in Company view. Access your staging site and convert the Student to a Student Profile or a Contract Training exclusive profile.

<u>Question:</u>
Did you convert to a Student profile or Contract Training Student profile? Why?

____

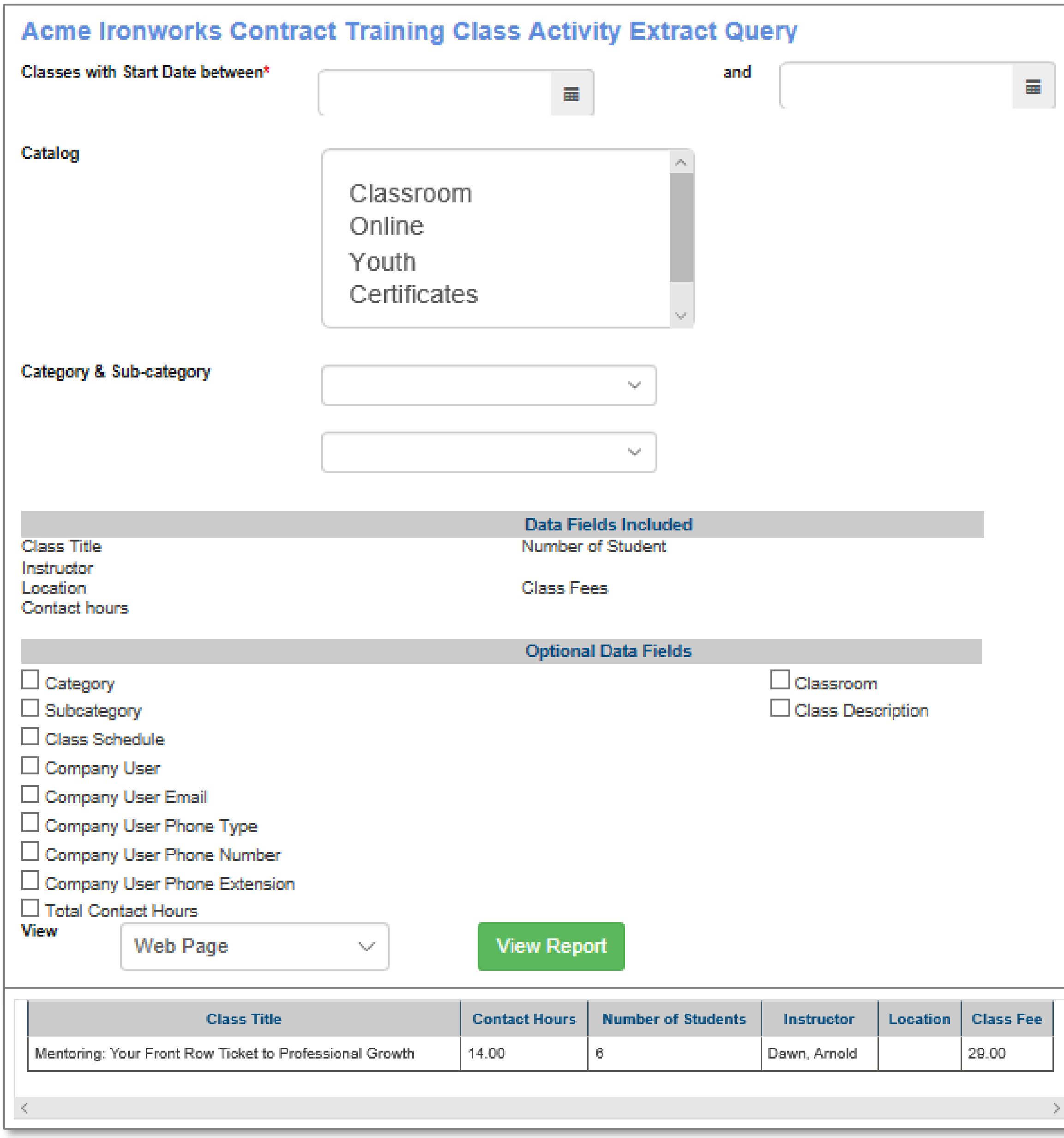
<u>Retention Activity:</u>
Learning the differences between a CT Learner Profile, a Slim Profile (if used) and Full Learner profile will help you better understand which profile will best meet the needs of your different customer segments.

Take some time and create a CT specific profile or Slim Profile and a Full Student Profile. Determine which might be needed by your customers. If using both, decide what optional fields and / or custom fields may be needed for the CT Learner / Slim Profiles.

Company Access

Company Reports

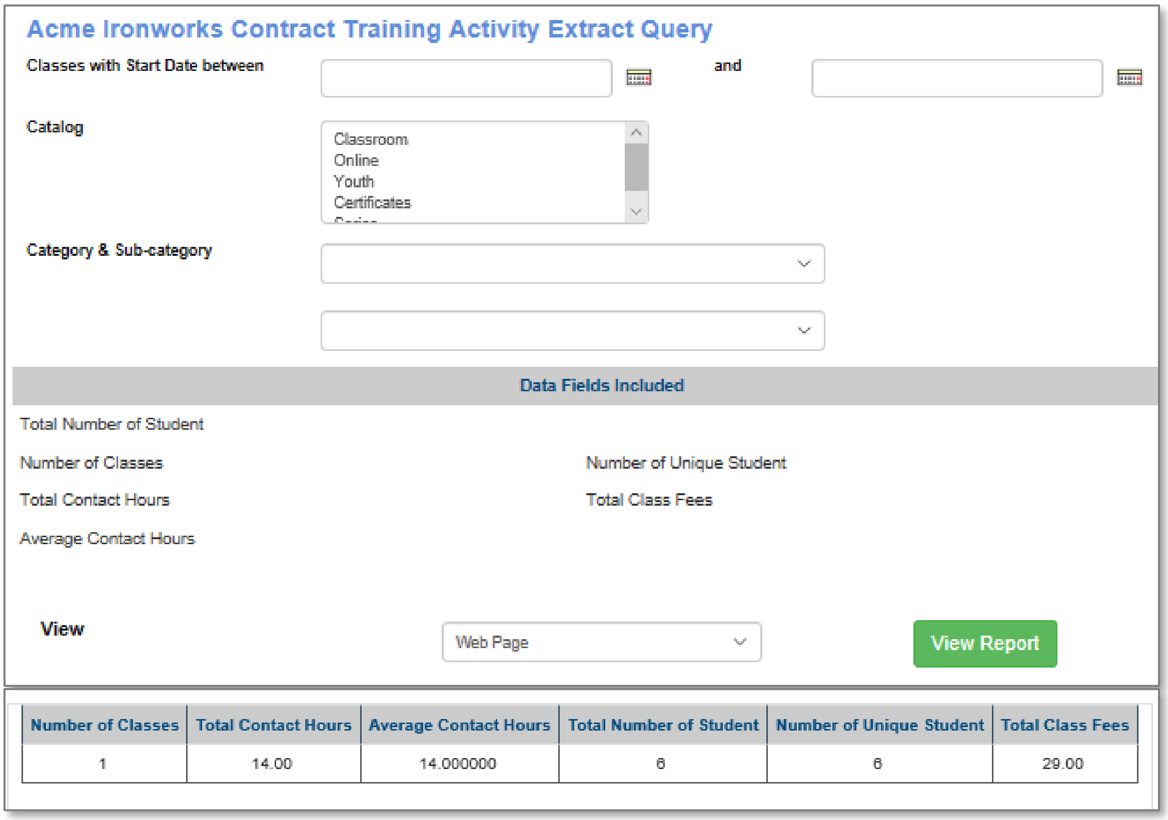
Logged in as a Company, Access ***Class Activity.*** The Class Activity Report includes optional fields the Company can add to their extract.



Date ranges are required to create the report extract. If your site does not have catalogs active, the catalog option will not display. Companies can extract their own Contract Training and Contract Training Class activity reports using these fields.

Data includes, number of students, contact hours, and fee. Optional fields are also available.

Logged in as a Company, Access ***Company Activity.*** The Company Activity Report includes number of students and Unique student (removing duplicates), number of classes, contact hours, and fees.

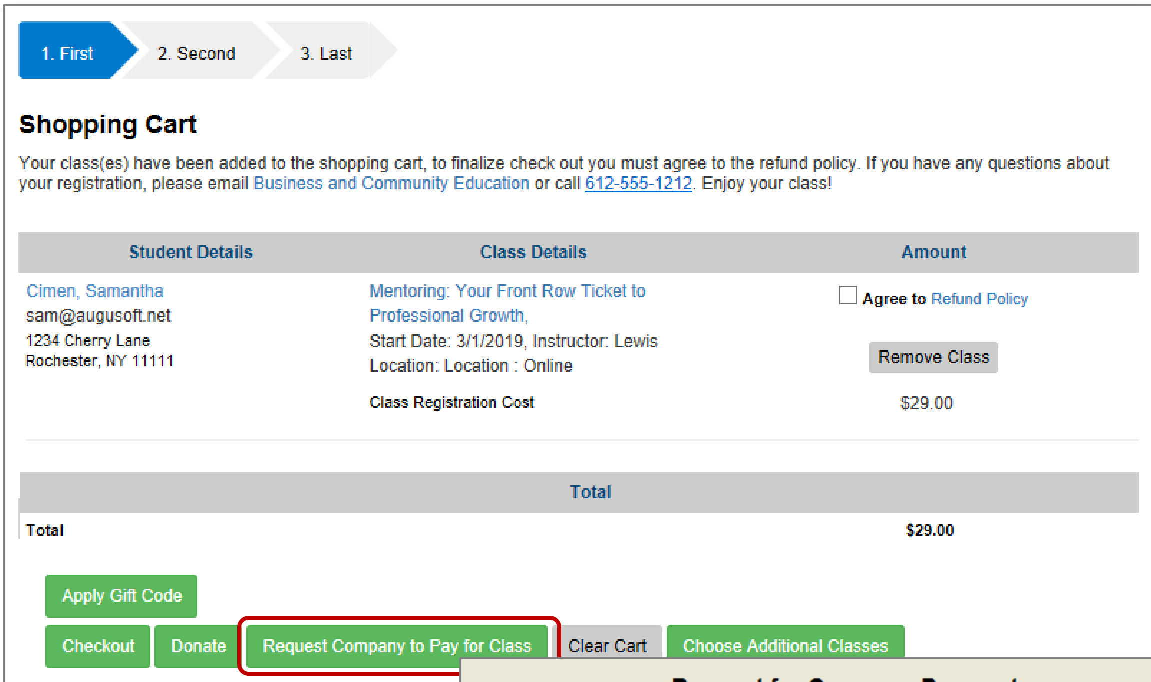


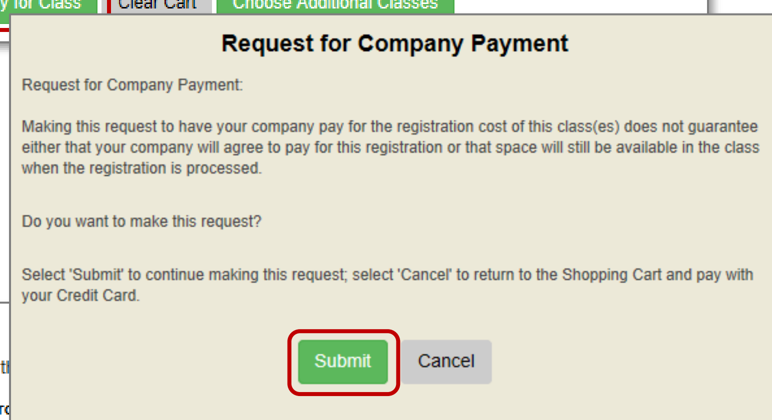
Company Users can also access their own activity report. It will show the number of classes and the number of students served.

Company Access

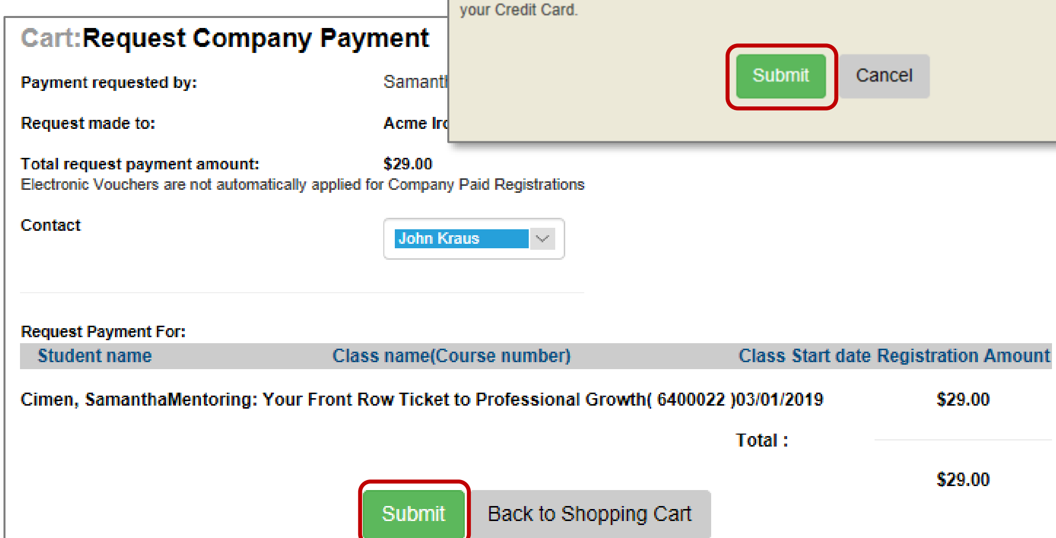
Manage Requests

Students can request that a Company pay for their Class if third party pay is enabled and if site is set up to allow. Below is a student example.





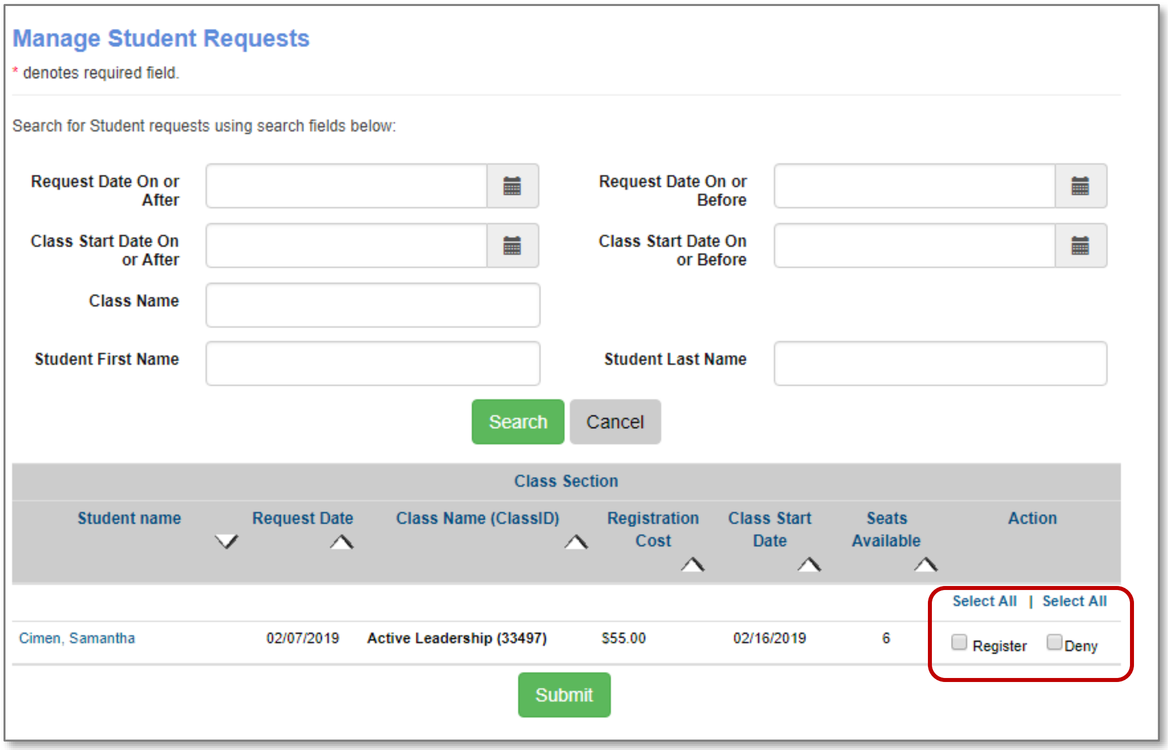
This is also described in the Accounts Receivable workbook.



Company Access

Manage Requests – Continued

Staff or Company representative can then log in and authorize the registration by acknowledging the request for payment.



<u>Ripple Effect:</u>
Student can only request a 3rd party pay for a class, if the site is set to allow, and a student is either associated with a compny or the site allows a student to self assocviate to a company.

These setting options are availble in *System Options > Power User > **General Settings*** Click *Edit* Show Company Field to Students be set to *Yes.* Lastly, third party pay must be enabled.

<u>Additional Reference:</u>
For addional information on Company-created Student profiles and how to covert profiles you may reference *Customer Support > Lumens Document Center > Quick **Reference Library*** and read the QRA titled, *Company Created Student Profiles.*

Knowledge Review

Company Profiles Review

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

Objectives for Company Profiles:

- Create the Company Information
- Define the Contact Names
- Determine Division Creation

To complete this review, use the *Company Profiles 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?).

The 'Staff Member Contact Email' is for ____.

In the Address Information tab, clicking on 'same for both' will _________________ the mailing address information into the billing address information.

Divisions are ____.

Contact names are _____________________________ for 3rd Party billing and CT class creation.

Company usernames and password ____ to the Company upon creation.

Knowledge Review

Company Profiles Review Key

Review answer key:

The 'Staff Member Contact Email' is for ____________the staff in YOUR organization with the company relationship_________________.

In the Address Information tab, clicking on 'same for both' will __duplicate_______________ the mailing address information into the billing address information.

Divisions are ____Not Required/Optional____________________________________.

Contact names are ___Required__________________________ for 3rd Party billing and CT class creation.

Company usernames and password ________________________are not automatically sent______________________________ to the Company upon creation.

Additional Resources:
Customer Support > Document Center > Lumens Lite > ***Managing Multiple Companies***

Knowledge Review
Contract Training Classes Review

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

Objectives for Contract Training Classes Module:

- Review Course Creation
- Create CT Classes
- Assign Students to CT Classes
- Discuss Rosters & Sign in sheets
- Demonstrate Charging the Class to the Company

To complete this review, use the *Contract Training Classes 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. Tuition on a CT Class is comprised of:

- ○ Per student tuition
- ○ Total contract amount
- ○ Per student tuition plus materials costs
- ○ None of the above

2. **T/F:** CT exclusive students are the only students that can be assigned to CT classes.

3. CT Exclusive students can have the following added to their profiles:

- ○ Optional Fields
- ○ Custom Fields
- ○ Both Optional AND Custom Fields
- ○ None of the Above

4. **T/F:** CT exclusive student profiles can be converted to standard learner profiles.

5. A Course is…

- ○ defined for open enrollment class creation use only
- ○ defined for contract training class creation use only
- ○ defined for use by either CT and/or OE class creation
- ○ Does not apply

Knowledge Review

Contract Training Classes Review Key

Review answer key:

Expected Results	**Related Information**
Tuition on a CT Class is comprised of: ○ Total contract amount	
F: CT exclusive students are the only students that can be assigned to CT classes.	*False: Full student profiles and Slim Profiles can be assigned to CT classes.*
CT Exclusive students can have the following added to their profiles: ○ Both Optional AND Custom Fields	
T: CT exclusive student profiles can be converted to standard learner profiles.	
A Course is… ○ defined for use by either CT and/or OE class creation	

<u>Additional Reference:</u>

For detailed information on contract training classes…

Knowledge Review

Contact Log Review

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

Objectives for Contact Log:

- Create a Contact Log
- Run an extraction of a Contact Log

To complete this review, use the *Contact Log 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?).

The contact log requires the following fields
____.

Before a Contact Log can be created you must first create a
____.

Extractions can be pulled by
____.

Company log can be _____________________________.

Contact logs can be sorted by ___________________________________ and Company name.

Knowledge Review

Contact Log Review Key

Review answer key:

The contact log requires the following fields ____________Company name, Company user, Date, Comment____.

Before a Contact Log can be created you must first create a ___Company Profile______________________________.

Extractions can be pulled by ____Company name and/or Staff members____.

Company log can be ___Edited____________________________.

Contact logs can be sorted by ______________________contact date_______________ and Company name.

Additional Resources:

Customer Support > Document Center > ….

Knowledge Review

Contract Training Reports Review

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

Objectives for Contract Training Reports:

- Review available reports
- Run examples of reports

To complete this review, use the *Contract Training 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 Contact Management report will provide ________________________________ as well as the company contact date and time information.

The three reports, Company Activity, Class Activity, and Contact Management can all be ______________________________ to be sent to an applicable party at regular intervals.

The Company Activity report does not require any ____________________________ to be created but filtering by Company name can be helpful.

The Class Activity report will display each ______________________________________ you have provided for your Company.

Knowledge Review

Contract Training Reports Review Key

Review answer key:

The Contact Management report will provide ___________the comment detail________________ as well as the company contact date and time information.

The three reports, Company Activity, Class Activity, and Contact Management can all be ________scheduled______ to be sent to an applicable party at regular intervals.

The Company Activity report does not require any ____Filters__________________ to be created but filtering by Company name can be helpful.

The Class Activity report will display each ___individual class_________________________ you have provided for your Company.

Additional Resources:

Customer Support > Document Center > Quick Reference Aids > ***Contract Training Report Additions***

Knowledge Review

Company Access Review

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

Objectives for Company Access Module:

- Review Company Views
- Assign Students
- Discuss Report Options

To complete this review, use the *Company Access 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 items will display on the Company dashboard?

- ○ Pending Requests
- ○ Accounts Receivable balance
- ○ Both of the above
- ○ None of the above

2. **T/F:** Once the Company profile has been built contacts and divisions can be added.

3. The Company student view allows companies to do the following:

- ○ Assign Students
- ○ Print the Roster
- ○ Print the Class Sign in Sheet
- ○ All of the Above

4. **T/F:** Once a student has been assigned to a CT class, the Company cannot remove the student from the class.

5. Which reports can a Company run regarding their CT programs?

- ○ Company Activity
- ○ Class Activity
- ○ Both of the above

Knowledge Review

Company Access Review Key

Review answer key:

Expected Results	Related Information
Which of the following items will display on the Company dashboard? ○ Both of the above	
T: Once the Company profile has been built contacts and divisions can be added.	
The Company student view allows companies to do the following: ○ All of the Above	*Assign students to a class IF the organization provides that access.*
F: Once a student has been assigned to a CT class, the Company cannot remove the student from the class.	*False: A student can be removed from a CT class at any time.*
Which reports can a Company run regarding their CT programs? ○ Both of the above	

<u>Additional Reference:</u>

For detailed information on company access…