

# Lumens PRO Level 2 Program – For Lumens iPRO Lumens Intermediate



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### Level 2 Program Overview

Introduction

#### Welcome to Augusoft Lumens!

One organization indicated, "If a Student cannot find what they need in less than 30 seconds, there is a good chance you are going to lose them." Lumens search and registration ease, benefits your students and your program.

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 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 2 program is designed to build on the basic knowledge in Level 1 and begin preparation and support of your production site.

Lumens PRO Level 2 will include intermediate training on the following topics:

- System Options
- Course Management
- Students
- Registrations
- Instructors
- Class Information

# Level 2 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.



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



**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.



**Questions** indicates questions for review and 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 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 new content.

#### Template Management

Objectives for Intermediate System Options:

- Review templates for webpages and emails
- Add optional and custom fields
- Discuss User Roles
- Define and create a promotion
- Summarize list value management

This section of the workbook will focus on the design and development of templates, user roles, optional fields, and promotions for your site as well as a review of List Value Management.

#### System Options > Template Management > **Webpage Templates**

Name	Description	Action
Web page templates		
A/R Payment Processing	Payment Processing Page displays upon successful completion of a registration.	Edit
Add household page	Add household page	Edit
Add Member page - staff	Add Member Page	Edit
Add Member-Student Page	Add Member Page	Edit
Add Student Page - Staff	Staff Member Adds new student profile	Edit
Add Student Profile - Student	Student creates a new student profile	Edit
Affiliates text	Affiliates text. (This is an 'extra' blank screen in Lumens. It can be linked from the banner or from another screen within Lumens.)	Edit
Choose profile - select Profile type	Choose Profile page	Edit
Company Welcome	Company Welcome Page (For Lumens CT and/or B2B modules)	Edit
Contact page text	Contact information displayed on your Contact page. (Display URL: Create link: /index.cfm?fuseaction=1003)	Edit
Course class list	Course class list page	Edit
Courses page footer	Displays at the bottom of the Courses page.	Edit
Courses page header	Displays at the top of the Courses page.	Edit
Courses: Search Results	This text will display at the top of the ?Course: Search Results? screen	Edit
FAQ	Frequently Asked Questions	Edit
Featured Classes header	Displays at the top of your Featured Classes page.	Edit
Gift Card	Gift Card Message	Edit
Home Page text	Displays on the front page of your Lumens site.	Edit
Instructor Welcome	Instructor Welcome Page	Edit
Make a Donation	Displays at the top of the Make a Donation screen	Edit

Simple text editor

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Knowledge of HTML code not needed for basic text entry / changes.

Ability to insert hyperlinks, images, tables.

Power User access not required.

Some things to think about as you design your templates:

- What is your unique selling position?
- What Image do you want to project to your target audiences?
- Do you have important benefits you provide to your students?



**Template Management – Continued** 

enotes required inform escription*			
•	Contact information displayed on your Contact page. (Display URL: Create link: /index.cfm?fuseaction=		
e Title	Augusoft - Contact Us	ר<	Arrows can
words		>	be opened
a Description			to reveal
		> T	details and maximum
		-	field
blay URL	/index.cfm?fuseaction=1003		options.
-		1	
			Toolbar offers
			standard
<u>IU</u> S×2		- F	word
			processing
tyles - Forr	nat • Font • Size • 🔺 🖾 • 🔀 🗊 ?		and in addition,
			fields for
		- II	IFrame,
		— II	Flash, and
			various developer
			tools such
	Sava		as button
	Save Cancel		builds.

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Webpages contain a statement such as – *update your site by replacing this text* – to encourage your organization to customize these public facing pages. Staff members with Administrative access (Staff Profiles with "grant administrative privileges" assigned) can edit webpage templates. Power User access is required if HTLM code, JavaScript, or CSS code is added to any of the webpages.

Your organization can try a variety of looks on your staging site (sandbox) before deciding about what look and feel to use for your production site. While building your site, keep in mind the following:

- You can add hyperlinks, graphics, tables, etc. to your public facing webpages.
- Limiting the different fonts you use on a page is a good practice.
- Don't forget to build font colors into your color scheme to avoid clashing colors or overuse of multiple colors/shades.

**Template Management - Continued** 

Name	Description	Action
Web page templates		
A/R Payment Processing	Payment Processing Page displays upon successful completion of a registration.	Edit
Add household page	Add household page	Edit
Add Member page - staff	Add Member Page	Edit
Add Member-Student Page	Add Member Page	Edit
Add Student Page - Staff	Staff Member Adds new student profile	Edit
Add Student Profile - Student	Student creates a new student profile	Edit
Affiliates text	Affiliates text. (This is an 'extra' blank screen in Lumens. It can be linked from the banner or from another screen within Lumens.)	Edit
Choose profile - select Profile type	Choose Profile page	Edit
Company Welcome	Company Welcome Page (For Lumens CT and/or B2B modules)	Edit
Contact page text	Contact information displayed on your Contact page. (Display URL: Create link: /index.cfm?fuseaction=1003)	Edit
Course class list	Course class list page	Edit
Courses page footer	Displays at the bottom of the Courses page.	Edit
Courses page header	Displays at the top of the Courses page.	Edit
Courses: Search Results	This text will display at the top of the ?Course: Search Results? screen	Edit
FAQ	Frequently Asked Questions	Edit

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Some webpages are available only if you are using the functionality.

For example, the membership webpage templates on the previous page would not be used if memberships were not being used.

#### Question:

Does your team have an idea of how you want your site to look? If not, what are your thoughts? Record below.

Additional Reference:

QRA available in Customer Support > Document Center > Quick Reference Library > Webpages-Adding Images, Links, and Anchors

#### **Retention Activity:**

Start thinking about who will manage these pages? Do you have someone experienced in HTML coding? Can your Marketing Department help you? Will you be promoting things on your home page periodically? If so, who will update this page?





#### System Options > Template Management > Email & Print Templates

Lumens generates automatic emails 24x7, Staff can also manually send emails. For example:

- When a Student registers for a class, he/she receives an automatic *Learner Confirmation*, provided his/her profile includes a valid email address.
- The system automatically sends *Class Reminders* so many days before a class starts or after Staff confirms the class. (How many days before is set at the Power User level)
- Lumens generates an automatic email when Staff adds a Student to a class waiting list.

In addition, Staff can manually:

- Send a class roster or class sign-in sheet to an Instructor
- Send an Instructor his/her username or password

We recommend customizing these templates to reflect the right message and tone.

Email Subject / Template Name	Email to:	Auto / Manual?	Sent-to?	Reply-to?
Cancellation Notice – Student	Students enrolled in a class when cancelled.	Auto	All Students registered in cancelled class.	None
Learner Reminder	Students enrolled in a class when confirmed.	Auto	Email address entered in Student profile.	None
Class Reminder	Students enrolled in the class a set number of days prior to class start.	Auto	All Students registered in a class.	None
Instructor Class Reminder	Instructor(s) a set number of days prior to class start.	Auto	Email address entered in Instructor profile.	None
Learner Profile Notice	Student when profile is created.	Auto / Manual	Email address entered in a Student profile.	None
Learner Confirmation	Student when registered for a class, regardless of who completes he registration.	Auto	Email address entered in a Student profile.	None
Learner Transfer Confirmation	Student when transferred by a Staff from one class to another class.	Auto	Email address entered in a Student profile.	None
Forgot Password	Student when he/she forgets password and needs to reset it.	Auto	Email address entered in Email field on Reset Password Request Page.	None

#### 

#### Lumens iPRO Customer Information

- Colleague
- PeopleSoft
- Banner

We recommend your organization look at your email communications early in the process to ensure you have prepared and update your emails to best meet your various functional needs.

#### 



#### System Options > Template Management > Email and Print Templates

Staff may insert data elements (dynamic text) into the templates. <u>Only</u> Power Users have editing privileges for email and print templates. Email and Print templates play a significant role in the creation of your site. Be sure to allocate enough time to the organization of the content.

Email and print templates		
Cancellation Notice - 3rd Party	Sent to the 3rd Party Payer when a class with a student that they paid for is cancelled	Edit
Cancellation Notice - Student	Sent to students when a class in which they are registered is cancelled	Edit
Class End Reminder	Emailed to student registered in an Open-Ended/Time-Limited Class a defined time before the end of the Time-Limit	Edit
Class Reminder	This note will be emailed to all students a set number of days prior to the start of a class	Edit
Class Waiting List Notification	Automatic email to student when student or staff adds Learner to Class Waiting List	Edit
Company Profile Notice	Company Profile Notice	Edit
Course Series Waiting List Notification	Automatic email to student when student or staff adds Learner to Course Series Waiting List	Edit
Course Waiting List Notification	Emailed to a student when the student to be added to a Waiting List for a Course.	Edit
Donation Confirmation	Sent to students after they have completed a transaction that includes a donation.	Edit
Draft Learner Profile Notice	This is sent to staff member, when a draft student profile has been created	Edit
Early Membership Purchase Reminder	Sent to Members so that they can purchase new membership before their current Membership Expiration date	Edit
Electronic Merchandise Distribution	This note will be emailed to a Student email address after a user has purchased a Merchandise Item with Delivery Type = Email/Download	Edit
External Room Reservation	Sent when an external room reservation takes place. (NA for Lumens Standard)	Edit
Forgot Password	This email will be sent to all users when forgot password link is used	Edit
Forgot Username	This email will be sent when forgot username	Edit
Gift Card Notification	This note will be emailed to the recipient email address of an eGift Card purchase	Edit
Instructor Class Reminder	This note will be emailed to the instructor(s) a set number of days prior to the start of a class and/or if you use go/nogo to confirm a class	Edit

As with webpage templates, some email and print templates are available only <u>if</u> you are using the functionality. For example, the *Gift Card Notification* and/or *Online Class Templates*.

#### <u>Question:</u> Who will take ownership of your templates on your site?

### Retention Activity:

Between sessions, each person should take at least one email template and modify the text and test it. Try with the following templates; Learner Confirmation (test by registering for a class), Class Reminder (test by manually sending a class reminder), Forgot Password (test by clicking on that to reset your password), and / or Student Profile Completion (test by creating a new student profile). These templates are easy to test (see details on testing for each in parenthesis).





**Template Management – Continued** 

Template Edit: Le	arner Confirmation	٦	
*denotes required informatio			Send HTML
Send HTML Email*	●Yes ONo		Email no =
Description*	Confirmation message sent to students when they register for a class.	ור	sending email in
Instructor Details	Instructor Name  Instructor Email Instructor Alternate Name Instructor Bio Name  V		plain text
*Instructor Details merge fie	Id content will display in email only if the template is html enabled.	H	= X
Text	(Bad Weather Text)		
	(Book Fee Cost) (Building Fee Cost) (Certificate Category)		Text = These are the dynamic text
*to add dynamic text to your	message please click the field above.	н	fields available
🖻 Source 🔒 🗋 🗟		1	for this email
BIUS×, x*	[] [] [] [] [] [] [] [] [] [] [] [] [] [		(each are
		h.	modified to the
Styles - Normal	• Font • Size • 🔺 🖾 • 🕃 🗊 ?	TI.	intended
(Todays Date)		^	audience)
	(Organization Name) (Organization Address) (Organization City), (Organization State) (Organization Zip) (Organization Phone) (Organization Catalog Requests Email) r a (Organization Name) class! The following information is everything you need to know in preparation for the class. If you contact us. If for any reason your class is cancelled you will be notified by a staff member via phone. <i>Thank you for</i>		Tool bar = Much like the Web Page template.
registering!			
(Learner Name) (Learner Address)			
(Learner Address 2)			
(Learner City State, Zip)			
body cfoutput cfoutput	p		
	Save		
		_	

To add dynamic text:

- Place curser in applicable location of email
- Click on the text you wish entered
- Text will pull from within your Lumens site
  - e.g. Organization Name is located in System Preferences, Learner name comes from the learner profile of the registrant.

#### Ripple Effect:

Emails apply to all your programs, so they should relay the tone and voice of your organization not any given program. We recommend assigning one person to the job of editing *Email and Print templates*. As a result, the writing style and tone is consistent.



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### Optional Field Set Up



#### System Options > Optional Field Setup

You can customize information you want to collect for various profiles. This is most commonly used for Student profiles to collect demographic information. If you don't see the element you want to capture in the *Optional Fields* menu, you can activate *Customer Fields*.

etup Setup Optio	onal Fi	elds	
nens Syst			
tumens System Optio	onal Fields (	Go To Custom	Fields)
ate new option	-		-
Generate HTML code for al	l Optional Forn	n Fields	
Activate new optional field			data value firs
Activate new optional field	s loi reports (	enter at least one	data value firs
Label	Classes	uired? Field Type Is I	and the line
Instruction Mode	Customized? Req	Select Box	Edit
Instruction Type		Select Box	Edit
Section Number		Text-	Edit
	Learners		
Label		uired? Field Type Is I	Enabled Action
Academically Disadvantaged		Radio	Edit
Alumni	•	Radio	Edit
Birthdate	•	<ul> <li>Text-date</li> </ul>	Edit
CIP Code of Major		Text-	Edit
Company Type	•	Select Box	Edit
Country		Select Box	Edit
County	•	Select Box	Edit
Displaced Homemaker		Radio	Edit
E-mail Preference Economically Disadvantaged Family or Individua	•	Radio Radio	Edit
Educational Level	' <b>.</b>	Select Box	Edit
Employee		Radio	Edit
Employer		Text-	Edit
Ethnicity	•	Select Box	Edit
Gender	•	Radio	Edit
How you heard about us	•	Select Box	Edit
In Directory		Radio	Edit
Individual with Disabilities		Radio	Edit
Job Title	•	Select Box	Edit
Limited English Proficiency		Radio	Edit
Major Type		Select Box	Edit
Race Remote Campus	•	Multi-Select box Select Box	Edit
Resident		Select Box Radio	Edit
Senior		Radio	Edit
Single Parent	-	Radio	Edit
Social Security Number	•	Text-integer	Edit
Transfer		Radio	Edit
Transfer FICE Code		Text-	Edit
Tuition Exemption/Waiver Code		Select Box	Edit
Tuition Status of CE Students		Select Box	Edit
U.S. citizen		Radio	Edit
	Locations		
Label	Customized? Requ	uired? Field Type Is I	Enabled Action
Location Type		Select Box	Edit



At minimum, it's a good practice to collect birthdate, gender, job title / occupation. Think about what data you are asking for – if you are not planning to use it, do not ask the Student for the information.

Each time you make an update to an *Optional Field*, click *Generate HTML code for all Optional Form Field* link <u>before leaving this</u> <u>screen</u>. This pushes the update out to the applicable affected profile types in Lumens.

Once Staff enters data into the field, return to this menu and click *Activate new optional fields for reports* link. This ensures data appears in applicable report fields.

**Optional Field Set Up** 

#### 

Lumens iPRO Customer Information

- Colleague
- PeopleSoft
- Banner

There are certain optional fields that will be implemented as part of the ERP integration (as applicable).

Colleague

- Instructional Methods
- Ethnicity
- Race

PeopleSoft

- Date of Birth
- Gender
- Ethnicity
- Race

Banner

- Date of Birth
- Social Security Number
- Ethnicity
- Race

When there are field values involved, Lumens will display an additional column to reflect the coordinating ERP code

Field Values						
Field Text	Field Value/Code	ERP Code	Sort Order	Default	Display	
Add new row						
None specified			1	۲	$\checkmark$	

**Optional Field Set Up - Continued** 

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The profile type of the Optional Field dictates its location on your site. In this example, the job title field displays in the Learner profile.

Update Optiona	I Field		Labal (bis is adius bis (s
Changes made to this informa	tion could affect the Reports!		Label: this is editable to provide an accurate
Back to Optional Field Lis	st		description of the field.
	General Field Options		
Description:	Job Title of the Learner		Hint: Displays below the
Label:	Job Title		field for users.
Hint:	Type or area of employment.		Is Enabled: Yes, will
Is Enabled:	Yes		activate on the website.
Is Required:	Yes		
Form Field Type:	Select Box 🗸		
Max Length:		(Max	Is Required: If Yes, will display a red asterisk *,
	Allowed: 0)		indicating it is required.
Data Type:	None $\checkmark$		indicating it is required.
Range:			
	(Enter 1,500 for a range from 1 to 500)		

#### Form Field Type:

- Select Box: Creates a drop down.
- Multi-Select Box: Creates a drop down and allows multiple selections.
- Radio: Creates a list to select one option from.
- Text: Allows a written response. Select Box and Radio button are changeable, but a Text field remains as text.

Max Length: Applies to the text box field and the number of characters allowed.

**Data Type:** Option helps define the data field; applies to text fields. Options such as credit card, currency, date, email, integer, numeric, range, telephone, time, URL, zip code.

Range: If data type is range, set the min and max of the numeric range allowed.

**Use Privacy Mask:** When set to *Yes,* the field is masked based on the settings in System Options > System Preference.

**Store as encrypted data:** It is important to check the option to mask any field (e.g. SSN) for optimum data security. <u>NOTE:</u> to ensure encryption, you must contact Augusoft.

To create a social security field on the Leaner Profile, Staff must enable *Alternative Learner ID* in *Optional Fields* and change the label (to Social Security Number). If using SSN, it is important to store the field as encrypted data. To encrypt, the field must be unique.



**Optional Field Set Up - Continued** 



Be sure to click the box next to the role that can update the field. All fields should have at least *Admin* and *Staff* checked. If left unselected, <u>no one can see the field</u> on the record.

	Who can update this data?	
Admin:		
Catalog request:		
Company user:		
Contract Training User:		
Draft:		
Guest:		
Household Account:		
Learner:		
Member:		
Slim Student:		
Staff:		
Teacher:		
	Where else should this data be displayed?	
Learner Profile Popup:		

Also, note that you need to select *Guest* if you want the field to display before or when a new profile is being created. If the fields should be editable after the Student creates the profile, then select Learner. (Same goes for *Household* and *Member* is these are activated in the site.)

	Field Values			
Field Text	Field Value/Code	Sort Order	Default	Display
			0	
			$\bigcirc$	
			$\bigcirc$	
			$\bigcirc$	

**Field Values:** Available if the form field is set up as Select Box, Multi-Select Box, or Radio (previous page). <u>NOTE:</u> Augusoft can change the *Field Text* if needed.

**Field Value/ Code:** This is not required and is an internal field. **Sort Order:** Indicates the order this list displays to the user.

**Default:** Staff may select one field as the default and any field can be unchecked to not display. **Display:** check box allows Staff to activate/inactivate accordingly.

#### Question:

Which optional fields will your organization enable? (Keep in mind, Augusoft can edit field text or add additional fields if needed.)



Write down the fields you may want to activate on your Lumens site:

**Optional Field Set Up - Custom** 

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### System Options > **Optional Field Setup**

Setup Op	tional Fields	
Lumens Syst	tem Optional Fields (Go To Custom Fields)	
	code for all Form Fields	
Activate new of	Setup Optional Fields	
	Custom Fields (Go To Lumens System Optional Fields)	
	Generate HTML code for all Form Fields Activate new custom fields for reports (first enter at least one data value, then click this link	<u>k the next day)</u>
	-	Add Custom Field

#### Click, Add Custom Field.

Custom Fields are like Optional Fields in functionality.

Update Custom F	ield	c
	remember that reporting on custom fields will be limited. to be collected, contact Augusoft so that they may be added to the ter.	Ŷ
Back to Custom Field List		s
	General Field Options	
Custom Field applies to:*	Catalogs V	
Label:*		C
Hint:		C
Is Enabled:	V Yes	
Is Required:	 Yes	L C
Form Field Type:*	Text V	l h
Max Length:*	(Max Allowed: 1000)	1.1
Data Type:*	None V	17
Range:	(Enter 1,500 for a range from 1 to 500)	
Use Privacy Mask:	Ves	L
		N
Admin:	Who can update this data?	
		C
Catalog request:		
Company user:		L C
Contract Training User:		
Draft:		
Guest:		
Household Account:		
Learner:		
Member:		
Slim Student:		
Staff:		
Teacher:		
	Save Cancel	

Custom Field applies to:

You can multi-select what records this applies to, such as:

Catalogs, Classes, Courses, Instructors, Learners, Household, Locations, Members, Organizations, Catalog Requester,

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# Intermediate System Options

Optional Field Set Up - Custom

Customer Fields can apply to many different areas in Lumens. Some fields, such as catalogs, program sections, and contract training will not apply if the feature is not active on your site.

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The field selected defines where the custom field displays <u>and</u> what report(s) it may be available in.

Form Field Type:*	Multi-Select box Radio Select Box Text	custom field from the list. Yo times as needed. NOTE: You are not allowed	is and you don't have space bel u will see 4 empty value boxes to remove values once you ente ing. Therefore, enter the values Field Values	to add more. You ma er them because that	y do tł	nis as many
		Field Text	Field Value/Code	Sort Order De	fault	Display
					0	
f Multi-Selection, I	Radio, or Select Box				0	
are chosen, the fie display.	ld values below will				0	
uspiay.					0	
			Save (	Cancel		J

#### If Text is chosen, various Data Type fields are available.\_

Form Field Type:*	Text	V No	
		cre	ditcard
		dat	e
Max Length:*		em	ail
	Allowed: 1000)	inte	eger
Data Type:*	None	✓ nur	meric
Same (Jpo)	None	ran	ige
		SS	N
Range:		tele	ephone
	(Enter 1,500 for a range from 1 to 500)	tim	e
Use Privacy Mask:	Yes	UR	L
	1.00	zip	code

Things to consider with labels and editing:

- Add label names understandable by all users. In some cases, the user may be a Learner or Staff. The hint may display as a hover or display in small text below the field.
- If the *enabled* box is <u>not</u> checked, the field is not active. This is how to inactivate the field if no longer applicable.
- If the *Required* box is checked, the field displays with a red asterisk \* like other required fields in Lumens. When the field is required, the system does <u>not</u> permit the user to save / submit the record until the field is populated.

#### Ripple Effect:

Custom fields can slow down the response time on any given site. The maximum number of custom fields for any site is 45, however we recommend <u>no more than 20</u> <u>fields</u> in any given profile type (i.e. Learners, classes, catalogs) etc.).





**Optional Field Set Up - Custom** 

#### 

Lumens iPRO Customer Information

- Colleague
- PeopleSoft
- Banner

When activating fields in Lumens, those with radio, select, or multi select will display field values. The first column of field values is a Lumens Value, this must have an entry. The second column is the ERP code. This code will match the ERP and is what ensures the information is integrated.

	Fiel	d Values			
Field Text	Field Value/Code	ERP Code	Sort Order	Default	Display
Add new row					
None specified			1	۲	$\checkmark$

Custom fields will be defined during the fit/gap session. If additional fields are determined, refer to the integration team for applicable requirements.

#### List Value Management

Update Cost Field Values



#### System Options > List Value Mgmt

List Value Management allows Staff to customize the field text for different lists found within Lumens. Currently available are *Cost Fields, Instructional Methods, and Provider Type*. Click *Edit* to view the list.

List Value Mana	gement	Fields		
V Label	-	ement Fields Field Type Is	Enabled	Action
		~ .	Enabled	
Cost Fields		Select Box		Edit
Instructional Method	•	Select Box	•	Edit
Provider Type		Select Box	•	Edit

• The value management fields are pre-populated.

• Staff can also add a hint, add a new field, change the sort order, set the default, select online type(s), and determine which fields to display or not.

1

Manage the Cost labels for the	Cost Fields that display	on the Class. Course Series	and Certificate scr	eens using the table b	elow	Cost Fie	elds and	Instr	uctional	
		Field Values	Add			Method				
Cost Name	Cost Type	Sort Order		o LERN Cost	Editable Label Display	Method	uispiay	5 11 0	ass sei	
Organization's Material C	Material ~			?s Material Cost		up.				
Facilities	Facilities ~		Other Costs			· ·				
Marketing Costs	Marketing ~	-	Marketing Co							
Other	Marketing ~		Other Costs		42 2					
Collateral Pieces	Marketing ~	-	Marketing Co	osts						
Class Prep	Instructor Cost ~		Other Costs	Update In	structional Meth	nod				
Curr. Dev.	Instructor Cost ~	_	Other Costs							
FICA	Instructor Cost ~		Other Costs	Changes made to	this information could affect th	e Reports!				
Other	Instructor Cost ~	-	Other Costs	Back to Field Li	et					
Per Diem	Instructor Cost ~		Other Costs		51					
Teaching	Instructor Cost ~	-	Other Costs	-		General Field Inf	ormation			
Travel	Instructor Cost ~	-	Other Costs	Description:		Type of the class deliv	/ery			
Overhead	Overhead ~	·	Other Costs	Label:		Instructional Method				
Catering	Facilities ~	3	Other Costs	Hint:						
		Submit Ca	ncel							
				Is Enabled:		Yes				
				Is Required:		Yes				
				Form Field Type	e:	Select Box				
Update Provider	r Type Value	s				Field Values	Add			
						ield Value/Code	Sort Order	Default	Online Type?	Display
Manage the Provider Type lab	els for the Provider Type	e Field that display on the Ci	ompany profile scre	een using the table be	OW.		1	۲	$\checkmark$	$\checkmark$
								0		_
Back to Field List							2	۲		$\checkmark$
		General Field Inf	ormation					0	_	
							3	0		
Description: Label:		Category of Provider C Provider Type	ompany					0		
Hint:							4	0		
Is Enabled:							5	0		
Is Required:		✓ Yes					5	0		
Form Field Type:		Yes Select Box					6	0		$\checkmark$
		OCICCI DOX								
						Save Car	ncel			
Field Text		Field Values Field Value/Code	Add	Sort Order	Default Display					
Group Home	1	Field value/Code	1	Solt Older		Provide	r Type o	display	vs in	
					) ]		•••	• •	, •	
Supportive Living	2		2		$\bigcirc$	compar	iy profile	<i>э</i> .		
Group Home & Suppo	rti 3		3		$\circ$					
Other	4		4		$\circ$					
		Save Ca	ncel							

#### **User Roles**



#### System Options > User Roles

User Roles allow access to be tailored per Staff role, granting access to menus that are pertinent to them and limiting or removing access to certain menus. Each role or actor has menu access assignments.

User Roles			
Select		Name	Status
	Add		
0	Administrator Default: Administrator		Active
Edit	iness Manager		Active
( Assign Clone	Users anager tract Manager		Active
Inactiva	ate jager Default: Course Manager		Active
0	Instructor Manager Default: Instructor Manager		Active
$\bigcirc$	Locations Manager Default: Locations Manager		Active
0	Program Manager Default: Program Manager		Active
0	<b>Registrar</b> Default: Registrar		Active
0	Student Manager Default: Student Manager		Active

Options available:

**Add**: Create a user role from "scratch."

**Edit**: Allows you to edit an existing user role.

**Clone**: Copies an existing user role and allows you to modify. **Inactive**: Inactivates an existing role (can be reactivated).

Edit User Role							
		* denotes require	ed information.				
Role Name*		Administrator					
Description		Default: Adminis	strator				
Default DashBoard Display		Staff Welcome	Page			~	
Assigned Users							
		Name				Status	Action
No assigned users.							Add
Menu Items Allowed							
Label		Nav.Path		Screen Na	ne	Status	Action
REGISTRATION	•			-		Active	Add Remove
student management	REGISTRATION/stude	ent management		student management		Active	Remove
Select Staff members	s to add to User	Role					
	Name			Login	Status	Se	elect?
Profile, Training				training	Active		
		Submit	Cancel				

• Assign users by clicking add. The list of staff will display.

• Menu items can be added or removed for each user roles. The menu options define exactly what items the person assign to that role can access in Lumens. **User Roles** 

#### 

Lumens iPRO Customer Information

- Colleague
- PeopleSoft
- Banner

For user roles, integration customers should consider a Security Person(s) that may control the creation and management of user roles and creation of staff profiles.

A security role in the organization would require Power User access but it would not impact the number of available Power User accesses available to the organization. The integration team can assist with this role.

To modify access more specifically within each role, click *Add* on *Menu Items Allowed*. When modifications are complete, click *Submit*. The *Access Selection* view will display.

	Label	Nav.	Path	Screen Name	Select
Send me a Catalog		-		Send me a Catalog	
my profile		-		my profile	$\checkmark$
Admin Menu		-		Admin Menu	
Shipping Costs: Sur	mmary	/Shipping Costs: Summary		Shipping Costs: Summary	
my favorites		REPORTS/my favorites		my favorites	
		A see a Calas			_
	opriate levels of access for				Vie
Please select the appr Screen/Function Name	opriate levels of access for Nav. Path			ing options. Access Options	Vie with
Screen/Function		the following links by selec			
Screen/Function Name	Nav. Path	the following links by select Action/Link	cting one of the follow		with car dis as
Screen/Function Name	Nav. Path COURSE MGMT/courses/classes COURSE	the following links by select Action/Link Save Quality Score	Cting one of the follow		with car dis

Views and tasks within each menu can be modified to display and hide as well as modifying specific features.

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User Role	(Super User) Registrar Student Manager Course Manager Locations Manager Instructor Manager
	Contract Manager Program Manager Administrator
	Intern

Super User is a default role in Lumens; you cannot delete this role. When managing Staff profiles, the user role drop down includes Super User and any other user roles activated / added by your organization. It is extremely important to assign the (Super User) role to at least one or two Staff members. This role is automatically updated with any new menus / submenus released in Lumens, by Augusoft. Staff with Super User access may assign the new menus to any other user roles as needed.

#### Additional References:

For more information review the QRA available in Customer Support > Document Center > Quick Reference Library > *User Roles* and check out User Reference Guide.

#### Question:

Do you anticipate a need for User Roles? If so, list some possible roles below:



System Options > **Promotions** 

Promotions

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#### Promotions The actions Search: available to the You cannot delete promotions that have been used. Add Promotional Discount Promotions are Edit or Inactivate. Setting the Code/bigten 10/23/2017 10% Comp 10% Active Action -12/31/2017 promotion to Spring discount Classes/5 Flat \$10.00 Active 02/01/2017 Action inactivate, allows 02/15/2017 you to disable the Classes Promo 3 Classes/3 20% 09/13/2012 Inactive 10/31/2012 promotion before it has run. Add Promotional Discount \* denotes required information. Promotion name Promotional discount method \* Flat rate O Percent Discount amount or rate \* Promotion start date \* mm/dd/yyyy Promotion end date \* mm/dd/yyyy Accounting Code $\sim$ Create this discount \* OBased on dollar amount OBased on classes in cart Based on code Code based Promotion Code \* Create this discount \* OBased on dollar amount Based on classes in cart OBased on code # of Class Promotions # of items ' Create this discount \* Based on dollar amount OBased on classes in cart OBased on code Dollar amount Dollar amount \* Promotion Submit Cancel

There are three types of Promotions available: dollar amount, number of classes and code.

A Promotion applied to a transaction, cannot be inactivated. Once the end date occurs the promotion expires and cannot be reactivated.

Promotions reduce tuition in the Shopping Cart, but do not apply towards the fees (material, book, etc.) attached to the class.

**Promotions – Continued** 

#### Ripple Effect:

Promotional discounts affect the shopping cart. This means it is not class-specific so be aware of how the discount is created.

#### Question:

Does your organization currently use promotions? If not, list a couple you might try on your new site.

#### Try It!:

Each member of the team will create a promotion.

- 1. Dollar Amount: Create a \$10.00 promotion for any shopping cart with \$100 or more in it and name it *Your Name Dollar Promo*. Enter today's date as the start date and make the end date 2 weeks from today.
- 2. Classes in Cart: Create a promotion based on 3 classes in the cart and include a \$25.00 discount amount. Enter the promotion name as *3-Classes Promo*. Enter today's date as the start date and make the end date 1 months from today.
- 3. Classes in Cart: Create a promotion based on 4 classes in the cart. Enter a promotion percentage of 5%, and use the name *4-Classes Promo*. Enter today's date as the start date and make the end date 10 days from today.
- 4. Code: Create a promotion based on the code EMP99. Enter a promotion amount of \$10.00, and label it *Employee Code Promo*. Enter today's date as the start date and make the end date 2 months from today.

If there are more than 4 on your team, add another promotion based on the code WEB2015. Enter the name as Web Promo 2015 and enter a promotion amount of \$5.00. Enter today's date as the start date and make the end date 4 weeks from today.

#### 

#### Lumens iPRO Customer Information

- Colleague
- PeopleSoft
- Banner

No matter the ERP, any created promotion must be assigned to an accounting code.





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#### Discounts

IPRO PRO CLTV

Objectives for Intermediate Course Management:

- Add discounts to a course and class
- Create an Online Course
- Add a lesson release statement in Lumens

This section of the workbook will focus on using some of the additional functionality for courses and classes. We will discuss creating discounts at the course level, creating an online course and development of lesson release times.

There are more advanced functionalities in Course Management. We will review and/or learn the additional options in the Advanced section of training.

*Course Mgmt* > *Courses* / *Classes* Click on the radio button next to desired class, select Discounts from drop down.

Discounts are set within your web site's feature configuration, and all discounts reduce the tuition only. Discounts do <u>not</u> affect material fees or any other fees associated with a class.

Select		Course	Dia man	Course N		Categ		Course Typ
Select		Course	Name		iumber 🔺	Subcate	lory egory	Course Typ
Add								
	Access I			260135 🗸		Profit:Computer		Classroom
Clone Discounts	Access II			260002		Profit:Computer		Classroom
Edit Waiting List	Access III			260003 🏏		Profit:Computer		Classroom
Truting List								
	unte							
		e part of a tra	insaction record	d.				
You cannot edit or dele Only one Early Bird Di	ete discounts that an scount can be active	e at any time.	insaction record	d.				
You cannot edit or dele Only one Early Bird Di Course Number/Name:	ete discounts that an scount can be active	e at any time.	insaction record	1.				
You cannot edit or dele Only one Early Bird Di Course Number/Name:	ete discounts that an scount can be active KTCO-3010e /#1 Ex	e at any time.	Insaction record	i. Fee/Discount	Start		Status	Action
You cannot edit or dek Only one Early Bird Di Course Number/Name: Course Fee: \$500.00 Name/Co	ete discounts that ar scount can be active KTCO-3010e /#1 Ex ndition	e at any time. cel			Start End I		Status	Action
Course Disco You cannot edit or dek Only one Early Bird Di Course Number/Name: Course Fee: \$500.00 Name/Co Discount: Age as of Se No discounts have been	ete discounts that ar scount can be active KTCO-3010e /#1 Ex ndition ptember 1,2018	e at any time. cel					Status	Action
You cannot edit or dek Only one Early Bird Di Course Number/Name: Course Fee: \$500.00 Name/Co Discount: Age as of Se	ete discounts that ar scount can be active KTCO-3010e /#1 Ex ndition ptember 1,2018	e at any time. cel					Status	Actior
You cannot edit or dek Only one Early Bird Di Course Number/Name: Course Fee: \$500.00 Name/Co Discount: Age as of Se No discounts have been	ete discounts that ar scount can be active KTCO-3010e /#1 Ex ndition ptember 1,2018 set for this option.	e at any time. cel					Status	Action
You cannot edit or dek Only one Early Bird Di Course Number/Name: Course Fee: \$500.00 Name/Co Discount: Age as of Se	ete discounts that ar scount can be active KTCO-3010e /#1 Ex ndition ptember 1,2018 set for this option.	e at any time. cel					Status	Actior
You cannot edit or dek Only one Early Bird Di Course Number/Name: Course Fee: \$500.00 Name/Co Discount: Age as of Se No discounts have been	ete discounts that ar scount can be active KTCO-3010e /#1 Ex ndition ptember 1,2018 set for this option.	e at any time. cel					Status	Actior
You cannot edit or dek Only one Early Bird Di Course Number/Name: Course Fee: \$500.00 Name/Co Discount: Age as of Se No discounts have been	ete discounts that ar scount can be active KTCO-3010e /#1 Ex ndition ptember 1,2018 set for this option.	e at any time. cel					Status	Action

The discount amount is the Course Fee *minus* the discount. For example, if your class costs \$75.00, and you want to give a \$10.00 discount, enter the discounted fee as \$65.00, the *net amount* of the class after subtracting the \$10.00 discount.

#### Ripple Effect:

Staff creates discounts at the Course level, and the discount is immediately available to new classes on a go-forward basis. Staff also have the option to apply the discount to any existing active classes.



Lumens iPRO Customer Information

- Colleague
- PeopleSoft
- Banner

For Colleague and Banner customers the accounting code <u>must</u> be selected for any created discount. Below are screen examples from a Code Discount.

PeopleSoft customers will not be required to add or select an accounting code.

ADD	COURSE DISCOU	NTS - CODE OPTION		ourse Discounts -	
* denotes r	equired information.		Code*		
ode*					
		Code must be alpha-numeric. No other characters.	Discount nar	me*	
scount r	name*				
			Banner Code	<b>P^</b>	~
lleague	Code*	~	Discounted f	fee*	
			Discounted i	lee	0.00
scounte	d fee"	0.00			Please be sure to enter the course fee net of the discount, NOT the discount amount.
		Please be sure to enter the course fee net of the discount, NOT the discount amount.			
Addt	his discount	No Active Classes		iis discount rresponding	No Active Classes
	rresponding classes?	NO ACTIVE Classes	classes		
Other	discounts allowed?*	⊖ Yes <sup>®</sup> No	Other	discounts allowed?*	⊖ Yes   ● No
Start	date/time*		Start d	late/time*	
		[m/d/yyyy h:mm	Start u	late/time	
		AM/PM]			mm [ m/d/yyyy h:mm AM/PM]
End d	ate*		End da	ate*	
		[m/d/yyyy]			m [m/d/yyyy]
Descr	iption		Descri	ption	
		Submit Cancel			Submit Cancel

#### 

**Discounts – Continued** 

The *Age as Of Discount* issues a discount automatically when the birthdate in the Student's profile matches the criteria defined in the Discount. It is intended to give a discount to younger Students; like the way a Senior Discount gives a discount to older Students. The discount automatically applies during the checkout process.

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Staff must enter the age as of date in *System Options > Power User > General Settings* Add or Edit the Age as of Date field.

	Add Course Fees Option Age as of September 1,2018 * denotes required information. Course Number/Course Name: CLFI-1540 /Yoga for Every Body Course Fee: \$45.00					
	Age for Discount*	13	13			
	Discount Name*	Yoga 4 Yo	uth Discount			
	Discounted fee*	50.00				
Add Course Discounts - Code Option  denotes required information.  Course Number/Course Name: CLFI-1540 /Yoga for Every Body				No Active Classes		
40 /Yoga for Every Body	Other discounts allowed?*		⊖ Yes ● I	No		
Course Fee: \$45.00			6/1/2018 2	:00 am	🚃 [ m/d/yyyy h:mm	
Code*			AM/PM]			
	End date*		8/31/2018		[m/d/yyyy]	
	Description		Summer S	eries Discount		
0.00	_		Submit	Cancel		
NOT the discount amount. No Active Classes Yes No Implication No Implication Index Notes I		and/or st code dur checkout available paramete a time ca end date There is	udents ing the t proce the sa er inclu an ever will als also ar	to enter shoppin ss. The ame day, ides a st be spe so be ch n option	the specific ng cart discount is as the start art date and cified. An osen. to allow the	
	40 /Yoga for Every Body	• dendes required information. Course Number/Course Nar Course Fee: \$46.00 Age for Discount* Discount Name* Discount dee* Please be sure to enter the cou- NOT the discount amount. Add this discount for corresponding classes? Other discounts allowed?* Start date* End date* Description 0.00 Please be sure to enter the course fee net of the discount, NOT the discount amount. No Active Classes Yes  No Image: Im/d/yyyy h.mm AM/PM] Image: Im/d/yyyy h.mm	<ul> <li>* denotes required information.</li> <li>Course Number/Course Name: CLFI-1540 /Yoga for Course Fee S45.00</li> <li>Age for Discount*</li> <li>Discount Name*</li> <li>Discount Name*</li> <li>Discount amount.</li> <li>Add this discount for corresponding classes?</li> <li>Other discount allowed?*</li> <li>Start date*</li> <li>End date*</li> <li>Description</li> <li>0.00</li> <li>Please be sure to enter the course fee net of the discount.</li> <li>NOT the discount allowed?*</li> <li>Start date*</li> <li>End date*</li> <li>Description</li> <li>0.00</li> <li>Please be sure to enter the course fee net of the discount.</li> <li>No Active Classes</li> <li>Yes          <ul> <li>Yes              <li>No</li> <li>Im/d/yyyy h:mm</li> <li>AM/PMI</li> <li>Im/d/yyyy h:mm</li> <li>AM/PMI</li> <li>Im/d/yyyy h:mm</li> </li></ul> </li> </ul>	• denotes required information.         Course Numes: CLFI-1540 /Yoga for Every Boc         Course Fee: \$45.00         Age for Discount*         Discount Name*         Voga 4 Yo         Discount armout.         Oliscounted fee*         Please be sure to enter the course fee net of the discount.         Add this discount armount.         Add this discount for corresponding classes?         Other discounts allowed?*         Ves •         Image: Start date*         AM/PMI         Bescription         0.00         Please be sure to enter the course fee net of the discount,         NO Active Classes         Yes • No         Image: I	Course Number/Course Name: CLFI-1540 /Yoga for Every Body Course Fee: 345.00 Age for Discount* Discount Name* Discount Name* Discount dee* Please be sure to enter the course fee net of the discount. NO Active Classes Other discounts allowed?* Ves  No Active Classes Other discounts allowed?* Ves  No Active Classes Other discounts allowed?* Please be sure to enter the course fee net of the discount. NO Active Classes Other discounts allowed?* Ves  No Code Discount: Cancel Please be sure to enter the course fee net of the discount. No Active Classes Ves  No Code Discount: Requir and/or students to enter code during the shoppir checkout process. The fa available the same day, parameter includes a st a time can even be spee end date will also be ch There is also an option discount to pertain to co classes.	

#### Question:

Would your organization use either of these discounts? If so, for what purpose?



Discounts

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**Early Bird Discount:** Automatically applies to anyone registering for a class prior to the *Early Bird* discount date.

Add Course Discount * denotes required information. Course Number/Course Name: CLFI-154 Course Fee: \$45.00		Managing this discount requires Staff to enter an
Discount name*	Early Bird	early bird end date for each term (in the
Discount Fee*	0.00	instructional calendar).
Please be sure to enter the course fee net of t NOT the discount amount. Add this discount for corresponding classes? Other discounts allowed?* Description	he discount, No Active Classes Yes No	This discount expires for all classes in the term on the same date. Staff can override this expiration date if necessary.

**Date Discount:** Date discounts automatically apply to a class registration during the date range as defined within the discount.

Add Course Discounts Date Option * denotes required information. Course Number/Course Name: CLFI-1540 /Yoga for Every Body Course Fee: \$45.00		
Discount name*		
Discounted Fee* Please be sure to enter the course fee net of the discount,	0.00	
NOT the discount amount. Aud this discount for corresponding classes?	No Active Classes	
Other discounts allowed?*	⊖ Yes ● No	
Start date/time*		[m/d/yyyy h:mm AM/PM ]
End date*		[m/d/yyyy h:mm AM/PM ]
Description		
	Submit Cancel	

Discount can be applied at the class level.

To activate immediately, set the discount to start on the current date and set the time to any upcoming time, to the minute.

#### Question:

Would your organization use either of these discounts? If so, for what purpose?



**Discounts – Continued** 



### Student Profile Attribute Discounts (Optional or Custom):

Add Course Discounts Stude	ent Profile Optional Attribute	
Course Number/Course Name: CLFI-1540 /Yoga fo Course Fee: \$45.00	or Every Body	
Discount name*		This discount is based on any
Discounted Price*	0.00	Optional Field activated on the
Please be sure to enter the course fee net of the discount NOT the discount amount.	t,	Learner profile.
Learner Attribute*	Equals Obes Not Equal	Create this discount by selecting any <u>enabled</u> optional field set up as a radio button or select drop
Add this discount for corresponding classes?	No Active Classes	down list.
Other discounts allowed?*	○ Yes   No	
Description	Add Course Discounts * denotes required information. Course Number/Course Name: CLFI-1 Course Fee: \$45.00 Discount name*	Student Profile Custom Attribute 1540 /Yoga for Every Body
	Sub Discounted Price*	0.00
	Please be sure to enter the course fee net NOT the discount amount.	of the discount,
	Learner Attribute*	~
		~
	Add this discount for corresponding classes?	No Active Classes
	Other discounts allowed?*	⊖ Yes  ● No
A similar discount is available f <i>Custom Fields.</i>	Or Description	
		Submit Cancel

Membership-based discounts are also available and will be addressed in a later training, if applicable.

#### Question:

Would your organization use either of these discounts? If so, which one and for what purpose?



**Discounts – Continued** 

#### <u>Try It!:</u>

Locate the discount you created, apply the following:

- 1. Code Discount
- Add a Code Discount using the Code AA11
- Use the Code Name Test Code AA
- Enter a discount amount (remember it is a *net* course amount)
- Use current date to active for 1 week
- <u>No</u> other discounts allowed
- 2. Date Discount
- Add a Date Discount
- Use the Code Name Test Date AA
- Enter a Discount Amount (remember it is a *net* course amount)
- Use next Monday (date discounts cannot start same day) active for 1 month
- <u>Allow</u> other discounts
- 3. Code Discount
- Add a Code Discount using the Code BB22
- Use the Code Name Test Code BB
- Enter a Discount Amount (remember it is a *net* course amount)
- Use current date active for 1 month
- <u>Allow</u> other discounts
- 4. Date Discount
- Add a Date Discount
- Use the Code Name Test Date BB
- Enter a discount amount (remember it is a *net* course amount)
- Use next Sunday active for 1 week
- <u>No</u> other discounts

If more team members need an activity each participant can create a new code and/or date and use an activity above.

When complete, register your Student for the discounted class you created. Have the Student pay with check.



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#### Lesson Release Times



#### Course Management > Lesson Release Times

Lesson Release Times is an optional feature that discloses when your organization issues online sessions. This is available for in-house classes only.

Lesson Release List You cannot delete lesson release times that are in use.	To create a new
Lesson Release Time     Status     Action       Add   No lesson release times.	release time, click Add
Add Lesson Release Time Blue type denotes required information. Lesson Release Time Submit	• Enter the time you want to release the online lesson.
Lesson Release List You cannot delete lesson release times that are in use.	• When you add lesson release times, a select

Lesson Release List		
You cannot delete lesson release times that are in use.		
Lesson Release Time	Status	Action
		Add
after 6pm on Wednesdays.	Active	Edit   Delete
at your own pace in this 100 hour course.	Active	Edit   Delete
at your own pace.	Active	Edit   Delete
available ongoing.	Active	Edit   Delete

• When you add lesson release times, a select drop down list becomes available for Staff to select from when creating in-house online classes.

#### Ripple Effect:

Lesson Release Times are available for both Open-Ended and Scheduled Online classes.

#### **Retention Activity:**

Think about any in-house online classes your organization offers. Do you release lessons at various times? If so, make a list of these times and make note of who will enter these into your production site under *Course Mgmt* > *Lesson Release Times* 



In-House Course Creation -Online and Hybrid



#### Course Mgmt > Courses / Classes

Add Course Expand All   Collapse All				Click Add
$\checkmark$	Course Inform	nation		
* denotes required information.				Delivery Type:
Course Name*				
	Spell Check	Subcategory Name*		Online or Hybrid.
Category Name*	select Category    select Category		Select SubCategory	
Alternate Subcategories (optional, for display only) 0 selected	Computer Incomposity - Computers for dov- Computer Technology: editing Started Computer Technology: Office Productivity Computer Technology: Programming & Scripting Computer Technology: Vendor Certification Computer Technology: Vendor Certification		•	Schedule Type: Scheduled, Open Ended (Instructor-led or online)
Course Number*		CIP Code		,
Meta Tag Keywords				Entering of URL in
Add Course Description *		Add Course Notes		Entering a URL is
Delivery Type*	Select a Delivery Type	ו		required when creating
Schedule Type*	Select a Schedule Type			an Online or Hybrid
Allow Make-up Hours?*	Ves  No	)		course. It will display as a
hours scheduled in the Basic URL	ted as replacement attendance for c Schedule	URL Text		hyperlink in the class listing.
Total Seats*		Add Olana		
Add Graphic	Choose File No file chosen	Add Class		
	Use jpg, gif, png file format, recommend max 50KB	Expand All   Collapse All		Olana Information
Add Listing Icon	Choose File No file chosen	*denotes required information.		Class Information
	Recommend approx. 15x15 png file format, <50KB	Course Name/Number	Leadership Today/BUS101	
		Category/Subcategory	Business & Professional Development/B	Business Careers
		Class name*	Leadership Today	
Open-Ende	<b>d:</b> <u>Online</u> class	Catalog*	Select Catalog	Ŧ
creation for o type.	open-ended schedule	Aiternate Catalog(s)	Click here to remove selections All Catalogs Licensure/Recertification Learn at Your Leisure Youth	▲
	ct, Self-Paced and	Term*	Select Term	<b>T</b>
then	complete class	Duration*	Self-Paced Time-Limited	
creat	ion.	Lesson Release Times	None specified	•

- Lesson Release Times are an option.
- Select, *Time Limited* and enter quantity of days, weeks, or months.

#### Ripple Effect:

For open-ended classes, both self-paced and time limited, class begins upon Student registration.

#### Additional Reference:

QRA available in Customer Support > Document Center > Quick Reference Library > **Online Open-Ended Classes** 



In-House Course Creation - Online and Hybrid - Continued



$\checkmark$		Class	Schedule Informat	tion		
Term*	Select Term	Duration (in	0	Lesson Release Time	es None specified	Y
Class Dates	M/D/YYYY - M/D/	Weeks)	0.00	⊞ Contact Hours	<sup>0</sup> None specif After 12am	fied Fridays
Structure	Basic	•			After 6pm o at your own	1 pace
Select ID Start Da Add Recurring Schedules	End Date	Instruct. Method	Start Time	End Time Pat	Available or	very WED and FRI
Add Recurring * denotes required inform						
Instructio	onal Method *	Online			Ŧ	
	Start Date *				<b></b>	<ul> <li>Assign <i>Term</i></li> <li>Select Lesson Release</li> </ul>
	End Date *				<b></b>	Times (if used) and / or click
		OR				Add Recurring Schedule.
Duratio	on (in weeks) *					
Recur	ring Pattern *	O Daily O Weekly	Monthly	Online 24/7		
Number	of sessions	0				
Contact hours	per session	24.00				
с	ontact Hours	0.00 Hrs				
		Edit Contact Hou	s			
		Continue	ncel			

#### **Scheduled:** <u>Online</u> class creation for a Scheduled course type.

- Instructional Method limited to those methods identified as Online in System Options > List Value Mgmt.
- Select Online 24/7 if there are no face-to-face meetings.
- Select *Daily, Weekly,* or *Monthly* if class has synchronous learning; (Student and Instructor meet online at a specified time).
- Contact Hours are editable.
- Lesson Release Times are available in the Class Add / Edit screen for classes created in-house.

In-House Course Creation - Online and Hybrid - Continued



Scheduled: For courses with Delivery type as <u>Hybrid</u> and Schedule Type as Scheduled.

- Hybrid used when in person and online components needed for same class
- Option: Lesson Release Times (if used)
- Select Basic, Flexible or Combination structure

Class Schedule Information										
Term*	Select Term	Duration (in weeks)	0	Lesson Release Times	None specified	Ŧ				
Class Dates	ilass Dates M/D/YYYY - M/D/YYYY		0.00	E Contact Hours 0.00						
Global Skip Date(s) Class Skip Date(s) Skip dates only apply to Ba structures.	Add Isic recurring schedule	Allow Make-up Hours?* Make-up Hours wi replacement atten scheduled in the E	dance for hours							
Structure Basic V										
Select ID Start Da Add Recurring Schedules	ite End Date	Instruct. Method	Start Time	End Time Patter	n City/Location	Room				

#### **Basic Structure:**

• If using the Hybrid delivery type, *Instruction Method* displays <u>all</u> online and classroom options. For example: Online class 24/7 and weekly meetings on Fridays in Lab setting.

Add Recurring Schedule *denotes required information.				Add Recurring Schedule *denotes required information.		
Instructional Method*		nline		Instructional Metho	od* Lab 🗸	
Start Date*		lassRoom ecture		Start Date*	1/16/2015	
		ab linical		End Date*	3/20/2015	
End Date*	3/22/2015	nline - Lecture			OR	
OR		/orldwide Learning		Duration (in weeks	<b>)*</b> 10	
Duration (in weeks)*	12		1	Recurring Pattern*	◯ Daily	
Recurring Pattern*	◯ Daily ◯ Weekly ◯ Month	nly 🖲 Online 24/7			Repeat every 1 week(s) on:	
	Number of Contact	hours 24.00			Sunday Monday Tuesday Wednesday	
	sessions per ses	sion			🗌 Thursday 🗹 Friday 🗌 Saturday	
Contact Hours	0.00 Hrs			Start Time*	9:00AM (Example: 8:15AM)	
Edit Contact Hours				End Time*	11:00AM (Example: 9:15AM)	
Conti	nue Cancel		J	Contact Hours	20.00 Hrs	
				City, Location*	Mpls V Marshall HS V	
					OR	
				Any city, Location*		
				Assign room now?*	● Yes ○ No	
				C	Continue Cancel	
Class ID: 175			L			
Tuition: \$199.00						
Schedule Information:	_					
Instructional Method	Dates	Class Days	Times	;	Instructor(s)	
Online	1/9/2015-3/22/2015	Online 24/7	NA O	nline	Jim Berkman	
Lab	1/16/2015-3/20/2015	Weekly -Fri	9:00 A	M - 11:00 AM	Sandy Green	
	J		0			

Guest view - class details page

In-House Course Creation - Online and Hybrid – Continued



Flexible Structure: Ability to add multiple dates. Available for all delivery methods.

Structure Flexible Dates		Flexible					
Select	ID	Instruct. Method	Start Time	End Time	City	Location	Room

Add dates, choose calendar, click on applicable dates, then click "done."

Flexible Dates										
		Add								
Select	ID	Instruct.	Method	Start Time	End Time	City	Location		Room	
Select All										
4/24/2018	1	Select	Ŧ			Select City	Select Location	7	Select Room	Ŧ
							Adv	anced	Search   Add Roo	m Det
5/22/2018	2	Select	•			Select City	Select Location	·	Select Room	۳
							Adv	/anced	Search   Add Roo	m Def
Add Details fo	vr Sal	acted Re	move Selec	hat						
Add Details to	лое	ecied Re	nove belet	sted						

Add details for selected dates

- Instructional Method options on list value management for your organization
- Start and end time
- Location, choose applicable city, then location, then room. Is based on location set up

**Combination Structure:** Ability to add recurring schedule <u>and</u> flexible dates. Available for all delivery methods. Combination structure allows for <u>both</u> *recurring schedules* and *flexible dates*.

• If Course *delivery type is Hybrid*, when Staff creates schedule, instruction method displays <u>all</u> online and classroom options.

Class ID: 177				
Tuition: \$139.00				
Schedule Information:				
Instructional Method	Dates	Class Days	Times	Instructor(s
Online	1/6/2015-7/7/2015	Online 24/7	NA Online	Linda Cooper
Online - Lecture	1/28/2015	Wed	9:30 AM - 11:00 AM	Josh Finney
Online - Lecture	2/19/2015	Thu	9:30 AM - 11:00 AM	Josh Finney
Online - Lecture	3/24/2015	Tue	9:30 AM - 11:00 AM	Josh Finney
Online - Lecture	4/15/2015	Wed	9:30 AM - 11:00 AM	Josh Finney
Online - Lecture	5/15/2015	Fri	9:30 AM - 11:00 AM	Josh Finney
Online - Lecture	6/22/2015	Mon	9:30 AM - 11:00 AM	Josh Finney
Online - Lecture	7/8/2015	Wed	9:30 AM - 11:00 AM	Josh Finney

Guest view - class details page

### **Intermediate Students**

#### Members

IPRO PRO CLTV

Objectives for Intermediate Students:

- Discuss Memberships
- Define and review Student emails and confirmations
- Locate and review catalog requestors

This section focuses on additional Student features and an overview of memberships (this training will be offered later if interested). We will look at other Student functionality such as emailing Students, Student confirmations, and catalog requestors (if activated).

Students > **Membership Types** 

Membership Types							
You cannot delete or inactivate the default Membership type or delete any types that are in use.							
To restore a complete Membership listing, click Reset; then click Search							
Membership Name			Status	~			
Membership Code			Sort Order				
Membership Fee			Max # of Member(s)				
Membership Expires?	🔿 Yes 🔿 No		Membership Duration				
Search Reset							
Select	Membership Code / Membership Name	Status/ Sort Order	Membership Fee / Early Renewal Fee	Max Member / Expire?			
Add							

Memberships are available in Lumens. This feature is like any standard membership program which consists of Student paying a defined fee to receive various classes at a discounted rate. Lumens allows you to segment groups of people and allow them access to certain classes.

In addition, you can also opt to offer benefits to your members, either allow members to take a specified number of classes or spend a specified amount of money per calendar year or term with their membership (excellent option for your Organization's employees).

Question:

Do you anticipate using the membership feature?



Memberships are available IF the membership has a \$0 cost.

# **Intermediate Students**

Student Communications: Emails and Confirmations



#### Students > Email to Students

Staff can send an additional 100 emails daily from Lumens, this is in addition to the automatic messages sent from Lumens triggers by an action (Registration Confirmation, Password Reset, etc.).

Send E-Mail Message to Students	Step 1	
You may send 100 additional e-mail messages to s	tudents today.	
Class ID		
Registration Status	Active	T
Registration date on or after	mm/dd/yyyy	Ħ
Registration date on or before	mm/dd/yyyy	=
Term		•
Catalog(s)	Combined Catalog Totals All Catalogs ed2go Online Courses Licensure/Recertification	* *
Category		T
	Submit Reset	

To email Students. • search for the Students by entering at least one search filter.

- To locate Students in • a specific class, first enter the course, and then the list of classes will populate in the dropdown list.
- Click Submit •

Send E-Mail Messa	ge to Students Ste	p 2					
You may send 100 additional e-mail mes	sages to students today.						
There are 9 students with valid e-mail ad	dresses shown on this display.						
There is 1 student that met your search o	criteria that did not have a valid e-mail addre	ess.	<ul> <li>Lumens indicates when a Student</li> </ul>				
Student	Send E-Mail?		does not have an er	nail addross			
Alexieff, Paul	$\checkmark$	_	uses not have an er	nali autress.			
Anderson, Angie		_					
Badura, Joanna	<b>v</b>	_	<ul> <li>Select the Stud</li> </ul>	ent(s) to receive the			
Baniak, John	<b>√</b>	_	email and click Submit.				
Bartnick, Wendell	<b>v</b>						
Charles, Bonnie	$\checkmark$	E-Mail Mes	sage for Students				
Dent, Stu	<b>v</b>		ect and message text, then press Submit. An e-mail il address with this site.	will be sent to all students enrolled in the class who have			
Parentis, Terri			* denotes require	ed information.			
Student, Terri		Subject*					
Waterman, Sally	No valid email address on file.	Reply-to*	steve@augusoft.net				
	Unselect all Emails	C	c jerry@augusoft.net;meg@augusoft.net	(Add additional email address separated with semicolo			
	Submit	Message text*					
				<u>_</u>			
Curatana Ontiona Cura		Attachment	1	Browse			
System Options > Sys	tem Preferences	Attachment	2	Browse			
Mailbox 4: Reply to		Attachment	3	Browse			
Mailbox 3 and 5: Carbo	on Copy (CC:)	Attachment	4	Browse			
Staff may affix up to for	ur attachments		Sub	mit			

Staff may affix up to four attachments

Click Submit to generate email.

with semicolon)

# **Intermediate Students**

Student Communications: Emails and Confirmations - Continued IPRO PRO CLTV STND

### Students > **Student Confirms**

Generate Student Confir * denotes required fields.	mations-Search	• Staff ma
Term	<b>T</b>	Learner con a per class t
Instructor	•	
Course Name		Enter se and click Su
Course Number		
	Submit	

y send firmations on pasis.

arch criteria ıbmit.

Course Number	Class Name (ID)	Start Date	Instructor	Action
KTCO-3010e	#1 Excel (27280)	01/01/2018	Abramson, Maurice	View Students
100055	No Fee Class (27289)	01/08/2018	Cain, John	View Students
123456	Sarah s Online Test (27550)	02/26/2018	Abramson, Maurice	View Students
KTCO-3010e	#1 Excel (27288)	03/05/2018	Abramson, Maurice	View Students
CLFB-1005	Basic Cake Decorating (27279)	03/06/2018	Turner, Denise	View Students
CLAR-3012	Art of Digital Photography 101 (27572)	06/04/2018	Jackson, Randall	View Students
CHDE-4000	Dental Radiography Update (27556)	06/15/2018	Magnuson, Henry	View Students

**Click View Students** • to see list of all Students in the class.

Generate Student Confirmations		
Class Name/ID: Dental Radiography Update/27556		
Start Date: 06/15/2018		
Student/Registration Name	Act	tion
Abad, Shirley/Abad, Shirley	Email	Print
Abbott, Anthony/Abbott, Anthony	Email	Print
Bryan, AnnaBanana/Bryan, AnnaBanana	Email	Print
Crabtree, Candice/Crabtree, Candice	Email	Print
Rea, Rachel/Rea, Rachel	Email	Print
	Select all Emails Submit	Select all Prints Reset

• The *Print* option displays a printable confirmation notice.

• If no email address available, the checkbox is grayed out and nonfunctional.

Upon Submit, this • view displays with the Reply To: prepopulated.

#### Ripple Effect:

Class Confirmation List

These confirmations do not override the automatic Learner Confirmation Students receive after he/she registers for a class / classes. In addition, Students have access to their own confirmations via his/her current registrations view.



# Intermediate Students

### **Catalog Requests**





When the catalog request feature is active, Guests can submit an online request for your catalog(s).

You can enable the catalog request menu item to display in *Configuration* > *Feature Configuration* > *Communication.* You will learn more about this in a separate training on how to set up your layout templates, colors, and graphics.

Free Course Catalog by Mail							
Thank you for your interest in our program. Please fill out the form below to receive your free catalog.							
<ul> <li>denote</li> </ul>	denotes required information.						
	Adult Education Leisure Learning Kids College To select multiple catalogs, press and hold the 'Ctrl' key						
First name*							
Middle initial							
Last name*							
line 1 > Address*							
line 2 > Address							
City*							
State*	Minnesota V						
Catalog reques	sts* terri@augusoft.net						
Waiting I	ist* meg@augusoft.net						
Email to instructo	prs* jerry@augusoft.net						
Email to studen	nts* steve@augusoft.net						
Gener	ral* cammy@augusoft.net						

• A Student can request a Catalog by filling out this form.

• Notice the similarity to a Student profile, but with much less detail.

• When the Guest user submits the request, an email is sent to the Catalog Request mailbox.

Mailbox 1, per the email address preferences in *System Options* > *System Preferences*.

#### Ripple Effect:

The mailboxes initially set up when building your site are important. In this case, be sure the Catalog Requests mailbox is monitored regularly so the catalog can be sent in a timely manner. Think about who this should be in your organization.





udents						
rch for Students by th a complete list of Stud		w. nd then click 'Search'.				To manage the information submitted b
Last Name	I		First Name			Catalog Requestors, St
Zip			Phone Number			must search for Catalog Requestors.
City			State		T	
Email			Learner ID			
Student Type	Catalog Requ	estor	v Student Status	Active	v	
Company Name			Learner Address			
User Name						
	Search	leset				<ul> <li>Staff can Edit,</li> </ul>
			Add New :	(Select Profile Type)	•	Convert, or Inactivate th
owing records 1 throu	ugh 12 of 2319.					profile.
Select		Name	Student Type	Membership Type	Status	
Stude	nt Profile		Catalog Requestor		Active	
Conve			Catalog Requestor		Active	
Inactiv	ate	imes A	Catalog Requestor		Active	
0	Ackley, Sco	tt	Catalog Requestor		Active	
STEP-1 ST	EP-2 STEP					

nis is the convert page. When you convert a catalog requestor to a Learner profile, the data provided in the request automatically transfers to the Student profile.

Staff must enter the • balance of the required information to create a full Learner profile.

Primary Address			Secondary Address		
			Same as Prima	ary Address	
Primary Address Type*	select one	$\checkmark$	Secondary Address Type	select one	$\sim$
Country*	U.S.A.	$\checkmark$	Country	U.S.A.	~
line 1 > Address*	136 Jacolyn Dr. S	W #9	line 1 > Address		
line 2 > Address			line 2 > Address		
City*	Cedar Rapids		City		
State*	Iowa	$\sim$	State	None specified	~

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Registrations – Late, Transfers, and Cancels

Objectives for Intermediate Registration:

- Process a transfer and a cancelation of a class
- Review the late registration process
- Place Students on waiting list

This section of the workbook focuses on intermediate processes for registrations.

Our program is a series of building blocks. These registration situations are more diverse than the basics of registration. These include completing transfers and cancellations.

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### Registration > **Student Management** select the Student and choose Late Registration.

Late Registration	choose to register			
Registering Jackie Aaberg		Students into the class		
Course Name	even after it has moved to a 'run' status. When this			
computers		occurs, the Late		
Class ID		<i>Registration</i> feature is used.		
Search		When Staff selects Late Registration, classes		
<ul> <li>Check box to select a class for late registration, then click on "</li> <li>Classes already registered for are indicated by a box.</li> </ul>	Add To Cart"	display in the <i>Run</i> status based on your Late Registration settings.		
Series Late Registration Certificate Late Registration		Search the course name		
Computer Certificate Programs		or number or scroll through the list. Once the		
Advanced Workplace Computing Certificate [CCCP-5200]		class is located and selected, click <i>Add to</i>		
Advanced Workplace Computing Certificate (Class ID 27166) Instructor 9:30 PM; 8 sessions starting 5/2/2017, ending 5/25/2017	: Gregory Meyer, Weekly -	<i>Cart</i> . Process as any registration.		

### Ripple Effect:

The number of days late registration classes display to Staff for registration is configured by a Power User. A change in the late registration number of days must be entered by a Power User through System Options > Power Users > **Class Set-up Settings**.





*Registration* > *Student Management* find the Student from the list, click *Transfer* on the drop down.

Current Registrations Tra	inscripts Tran History	Merchandise	Transfer	Cancel	Waiting List			
Current Registrations for Aaberg, Sarah								
* Indicates payment includes On Account								
Select	Class name (ID) Registration name				Start date	Class cost		
Transfer Class	12 Lead EKG Interpretation (2 Aaberg, Sarah	7157)			05/08/2017	\$295.00		
	Motorcycle Training: Basic Rider Course Io (27175) Aaberg, Sarah			09/23/2017	\$225.00			

- Locate the applicable class and click *Transfer Class*.
- Use search feature to locate the new class either by name or course number.

Transfer	Class List		
Search using	course or class name or course number or class id		Search
For a comple	of the course or class name or the complete course number to search. te course listing, clear the search field, then press Search. rds 1 through 12 of 24.		
Course Number	Class Name (ID) /Date	Class Cost / Rem Seats	Action
KTCO-3010e	#1 Excel (27280) Schedule : Weekly - Mon 9:00 AM - 11:00 AM; 26 sessions; starting 1/1/2018, ending 6/25/2018	\$560.00 99	Late Registration Transfer in
KTCO-3010e	#1 Excel (27288) Schedule : Multiple Class Schedules: Classroom: Weekly - Mon 9:00 AM - 11:00 AM; 4 sessions starting 3/5/2018, ending 3/26/2018. Classroom: Wed 8:00 AM - 10:00 AM; 1 session on 03/21/2018.	\$500.00 99	Transfer in

• Next, click *Transfer In* to move the student to the applicable class.

If the class is in run status, you can still transfer the Student using *Late Registration* at the top of the page and complete the transfer the same as a late registration.

You do not have to transfer a Student into the exact same class on a different day. The transfer feature works the same way when moving a student from Excel Beginners to Word Advanced, for example. If there is a price difference, payments or refunds are prompted.

Ripple Effect:

Both transfers and cancels are based on the number of days set in *System Options* > *Power User* > *Class Set-up Settings* for these types of transactions. Typically, organizations set up transfers and cancels to occur within 60 - 90 days after the class end date.



Registrations - Late, Transfers, and Cancels

#### 

Lumens iPRO Customer Information

- Colleague
- PeopleSoft
- Banner

Transfers are not available on any of the ERPs. The option will not display on the drop-down list for the learner and will not display on the learner dashboard view.

To transfer a learner, complete a class cancellation, then a registration to the new class. Process mapping would have been built during the fit/gap or subsequent meetings.

Current Regist	rations	Transcripts	Tran History	Cancel	Waiting List	
Back to Students Back to Current Student Account						

Registration
Register
Late Registration
Current Registration
Transcripts
TranHistory
Waiting List
Cancel

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Registrations - Late, Transfers, and Cancels - Continued



### **Transfer Registration Transaction Review**

\* denotes required information. If computed service fee is under \$1.00, it is not displayed.

				Deview alass	turnefer	
Student ID : Student Name		55127 : Sarah A	aberg	Review class details for acc		
Registration Name		Aaberg, Sarah		before processing the		
Registration ID : Date		85543 : 04/27/20	)17	transfer.		
Transaction ID : Date		69763 : 04/27/20	)17			
Memo		[None]				
Transaction Balance (Original payments minus previous refund			\$295.00 - \$0.00 = \$295.00			
Payment method(s)		Check : \$295.00				
Payments made			Transferring from		Transferring to	
Number of registrations in	Class ID		27157		27280	
original transaction	Class Name		12 Lead EKG Interpretation	on	#1 Excel	
Registration fee	Start date		05/08/2017		01/01/2018	
	End date		06/01/2017		06/25/2018	
	Days until class		Started		Started	
Choose whether to	Tuition fees (Fee minus discounts)		\$295.00 - \$0.00 = \$295.0	0	\$500.00 - \$0.00 = \$500.00 (Fee minus discounts)	
charge the service fee or	Prepaid lab fee (Fee minus discounts)		\$0.00 - \$0.00 - \$0.00 = \$0	0.00	\$10.00	
not. Additionally, other fees may or may not be	Prepaid book fee (Fee minus discounts)		\$0.00 - \$0.00 - \$0.00 = \$0	0.00	\$10.00	
refunded. If a payment or refund is due based on the transfer, an additional	Prepaid program fee (Fee minus discounts)		\$0.00 - \$0.00 - \$0.00 = \$0	0.00	\$40.00	
screen for payment or	Charge \$20.00 service fe	e?*	●Yes ◯No			
refund will display. The view is very similar to the	Code Discount					
shopping cart.			Con	tinue Cancel		

### Ripple Effect:

Lumens automatically determines the service fee according to the refund policy assigned to the class. When transferring a student, you can opt to charge the service fee or not. We recommend including a statement in your refund policy about any fees related to transfers if you plan to charge a service fee.



Registrations – Late, **Transfers**, and Cancels - Continued



-	ation Transaction Rev tion. If computed service fee is und		Review the Transfer To			
Student ID : Student Name	•	55127 : Sarah Aaberg	and <i>Transfer From</i> fields for accuracy. Confirm the amount of refund or payment (if			
Registration Name		Aaberg, Sarah				
Registration ID : Date		85543 : 04/27/2017				
Transaction ID : Date		69763 : 04/27/2017	any).			
Transaction Balance (Original payments minus previ	ious refunds)	\$295.00 - \$0.00 = \$295.00				
Payment method(s)		Check : \$295.00				
Payments made						
Number of registrations in		1				
original transaction		Transferring from	Transferring to			
Registration fee	Class ID	27157	27280			
Registration lee	Class Name	12 Lead EKG Interpretation	#1 Excel			
	Start date	05/08/2017	01/01/2018			
	End date	06/01/2017	06/25/2018			
	Days until class	Started	Started			
Tuition fees (Fee minus discounts ) ) Prepaid lab fee		\$295.00 - \$0.00 = \$295.00	\$500.00 - \$0.00 = \$500.00 (Fee minus discounts)			
	Prepaid lab fee (Fee minus discounts )	\$0.00 - \$0.00 = \$0.00	\$10.00			
	Prepaid book fee (Fee minus discounts )	\$0.00 - \$0.00 = \$0.00	\$10.00			
	Prepaid program fee (Fee minus discounts )	\$0.00 - \$0.00 = \$0.00	\$40.00			
	Merchandise Costs (Including Taxes)	\$0.00	\$0.00			
ransfer service fee	Total Merchandise Item Discounts	\$0.00	\$0.00			
ayments Made for Merchandise Item	15	Sarah Aaberg : \$0.00				
ayment Made (Does not include Reg		Sarah Aaberg : \$295.00				
uggested Payment Amount:		\$285.00	If a Service Fee is			
			charged or the class has			
ayment Options: Sarah Aaberg:S	uggested Amount = \$285.00		a higher cost, Lumens w			
ou may process a payment amount	of zero if you choose not to require payment or	to issue a refund.	request an additional payment, and the			
arah Aaberg Suggested payment an	nount:	285	payment method view w			
uggested action:			be available on the next			
you need to change the payment a	mount, please process an UNDERPAYMENT o	r OVERPAYMENT from the next page	screen. If a refund is due			
Payment $\bigcirc$ Refund $\bigcirc$ Zero amount			a refund method screen will display.			

Registrations – Late, Transfers, and Cancels - Continued



Staff option to add memo to transfer transaction.

Transfor Pogistra	ation Transaction S	lummany	٦
Inalisier Registra	ation mansaction a	builling	
	Student ID	856	
	Student name	Phyllis Adams	
	Student Address	8513 Ganttcrest Dr.	
		Austin, TX 78749	Transfer confirmation
	Registration for $\lambda$	Adams, Phyllis	is sent automatically to
	Old Registration	New Registration	Student with valid email
Registration ID	7030	7032	address in profile.
Registration date	01/07/2012	01/07/2012	
Transaction ID	7044	7045	<ul> <li>Staff can print if</li> </ul>
Transaction date	01/07/2012	01/07/2012	desired.
	Transferred from	Transferred to	The transfer email is
Class ID		9559	
	MS Excel for Beginners	MS Excel for Beginners	located in System
	01/03/2012	03/06/2012	Options > Template
	01/20/2012	03/23/2012	Management > Learner
			Transfer Confirmation
	Product	Amount	
Payment Amount		\$325.00	
Refund Amount		(\$325.00)	
Total payment		Frank Albertson 4352 Sampson Dr.	
Add memo text to the	transfer-in transaction	Minneapolis, MN 51235	
Print view		Student Class Transfer Ticket	
Print student transfer	confirmation	the class. If you have any questions, please contact us.	iccessfully processed! ess Basics I.The following information is everything you need to know in preparation Confirmation Date: 06/03/2011 Confirmation Number: 1846 Course Number/Name: y, 9:00 AM - 11:00 AM; 18 sessions starting June 13, 2011, ending July 11, 2011 (N
Back to transfer/cance	el student selection	Class of May 30, 2011, May 31, 2011)	
		Important Info:	
		Please bring the materials fee (MaterialsCost) to the first	tclass. Instructor:
		EMailLearnerTransferConfirmationQry.InstrName Instructor's Phone(s):763-331-8300 Instructor's Email: yvette@augusoft.net	
		Things to Know or Bring:	
		Class Location: Warnke Hall 1234 College Drive	
		Collegeville, MN 55555	
		Classroom: TBD	
		Directions to Class Location: Hwy 169 N to Cty Road 42 E Turn Right	
		Thank you for registering!	

#### Ripple Effect:

When a transfer occurs, the funds from the original transaction do not follow the transfer. If the transfer is even, Lumens will display a waived fee (because the fee was already paid), if more than the original transaction, a payment screen will become available. If the class is less than the original transaction, a refund method screen will display.



Registrations – Late, Transfers, and Cancels - Continued



### Registration > **Student Management** search the Student name, select Cancel

View Registration Details for Michelle Aaron Current Registrations Transcripts Tran History M Current Registrations for Aaron, Michelle Select Certificate Cancel Class name (ID) Registration name Select AI Alternating Current (23427)	Start date Class cost	<ul> <li>Select class to cancel, then click continue.</li> <li>Staff can cancel multiple classes or choose to refund the class with no cancellation notification.</li> </ul>
Aaron, Michelle  Molorcycle Training: Basic Rider Course to (27175) Aaron, Michelle  Cancel Registration(s) Refu	Cancel Registration Tran	
	Student ID : Student Name	40926 : Michelle Aaron
The Transaction Review displays the original transaction details. Do you want to refund	Registration Name	Aaron, Michelle
	Registration ID : Date	83026 : 08/16/2012
	Transaction ID : Date	67124 : 08/16/2012
<ul> <li>Do you want to refund any of these fees?</li> </ul>	Memo	[None]
	Payment method(s)	Amerigas : Company Account: \$1,000.00
	Total AR Payments	
	Class ID : Name	23427 : Alternating Current
	Staff Registration Begins	10/23/2011, Self-Paced
	Days until class	Started
	Class Registration	\$1,000.00
	Number of registrations in original transaction	8
	Registration fee	\$0.00
	Refund Tuition Fee? *	●Yes ◯No
	Service Fee	\$20.00
	Charge Service Fee?*	●Yes ◯No
	Add Memo	

### Ripple Effect:

Just like transfers, a cancellation service fee is determined based on the refund policy assigned to the class. In this situation, the refund policy dictates a charge of \$20.00. The system always provides the option of charging the service fee or not.



Service fee

**Total Refunds** 

**Total Credits to AR** 

Registrations - Late, Transfers, and Cancels - Continued



			<ul> <li>The transaction balance</li> </ul>			
Cancel Registration Transacti	on Review	- Step 2	is the total registration amount.			
* denotes required information.			The default refund			
Student ID : Student Name	40926 : Aaron, Michelle		method originates from			
Registration Name	Aaron, Michelle	2	the refund policy. Staff can edit here.			
Class ID : Name	23427 : Alterna	ating Current	<ul> <li>The refund amount is</li> </ul>			
Transaction Balance (Original payments minus previous refunds)	\$2,594.00 - \$0.	.00 = \$2,594.00	editable, but limited by an amount set by Power			
Payment Method(s)	Amerigas : Cor	mpany Account: \$1,000.00	Users.			
Payments made to AR Account						
Class Registration	\$1,000.00					
Promotion Code : Discount Amount	None : \$0.00					
Service Fee	\$20.00					
Send Transaction Receipt to Student	○ Yes ● No					
Send Transaction Receipt to 3rd Party	⊖ Yes ● No					
		Totals	Amerigas			
Class Registration						
Refund		(\$0.00)	0.00			
Credit to AR		\$(1,000.00)	1000.00			

Transaction amount is the refund amount. Also displayed is a breakdown of how the amount is

\$20.00

(\$0.00)

(\$980.00)

20.00

Transaction amount is the refund amount. Also displayed is a breakdown of how the amount is calculated. In this case, there was \$20 service fee and the Materials Fee was not part of the refund.

#### Ripple Effect:

When your organization sets up a *Maximum Refund Override Variance*, this applies as the maximum amount Staff can change a refund when cancelling a registration. Any change will result in a misc. charge/credit. Managing this amount can protect the organization against excessive override amounts. *This variance is set up in System Options > Power Users > General Settings.* 



(\$0.00)

\$(980.00)

Registrations - Late, Transfers, and Cancels

Lumens iPRO Customer Information

- Colleague
- PeopleSoft
- Banner

When cancelling a student out of a class in either Colleague or Banner, Lumens will display a Cancel Type' This field is required and is designed to match the cancel options in the applicable ERP.

Cancel Type*	~	
Effective Date	mm/dd/yyyy	
Add Memo		
	Continue Back	

Registrations – Late, Transfers, and Cancels - Continued

Review before you begin:

- To complete this activity, you will benefit from having a second class created.
- Access the Course you built previously.
- Click on the Course name to locate the Class.
- Click on 'Clone' to clone a class you built initially.
- Clone a new class with a new date (remember the instruction calendar that is in your system, have you crossed over to a new term?)
- Complete the cloned class.

### Questions:

Did you have any difficulties finding the course/class you created?

Did you have any difficulty cloning the class? If so, what was missing?

### Try It!:

Each person:

- Locate the Student you created (or create another one).
- Register the Student for your class (if not already registered) and one of your team mate's classes.
- Now transfer your Student from the original class you created to the new one you just cloned. Do not charge a service fee.
- Now cancel the Student from the class he/she was registered.
- Finally, check the Student's *Transaction History* and *Current Registrations*.











**Registration - Waiting List** 

### Registrations > Waiting Lists

When a class is full, the waiting list button displays on the Subcategory page.

Select	Class Name(ID)	Days Until Start	Status	Total Seats/Filled Seats % Booked/ # on Wait List
0	Anatomy-Human Body Function (27551) Mon 8:30 AM - 7:00 PM; 1 session on 02/26/2018	-25	Run	1 / 1 100% / 1

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If the waiting list feature is <u>not active</u>, Students and guests see *Filled*. Whereas Staff sees *Full Override* button and can register the Student.

To manage class waiting lists, from the left navigation bar hover over *Registrations* and click *Waiting Lists*.

Search for Waiting	Lists				
Search for Waiting Lists using	he search field below				
Class/Course/Course Se	ries Name				Staff can find a specific
Class Starts On or After			mm/dd/yyy	y ]	waiting list by using various search filters or
Class Starts On or Befor	e		mm/dd/yyy	y ]	click Search to retrieve all
Includes Classes Startin	g On	~			class waiting lists.
Class ID					
Search For		Class Waiting Lists	~		
Term			~		
Category		Arts Play			
Subcategory					
Class Status	(	Active Confirmed			<b>-</b>
For a complete class listing, cle	ar the search field above then pres	s search.			To view the waiting list,
Classes without a waiting	list are not shown.				click the radio button next
Select Cl	ass Name(ID)	Days Until Start	Status	Total Seats/Filled Seats % Booked/ # on Wait List	to the Class Name.
Beginning French Fri 9:00 AM - 11: 09/26/2014	(90) 00 AM; 1 session on	3	Active	12 / 12 100% / 3	

Registrations - Waiting List - Continued



The Class Waiting List displays the Student Name, who added the student to the waiting list, and his / her rank on the list.

Class Waiting List Course Number (2400001) Beginning French (90) Fri 9:00 AM - 11:00 AM; 1 session on 09/26/2014 Available Seats: 0 Total Seats: 12 % Booked: 100% # on WaitList: 3								
Search for Students using Last Name Search For a complete student listing, clear the search field above then press search.								
Select	Email Students	Name (ID)	Added On Added By	List Rank				
Add student to waiting list	Select All							
Devictor		<u>Olson, Eddie</u> (10095)	09/22/2014 Administrator	1				
Register Remove		Clooney, George (10102)	09/22/2014 Self	2				
Move to Course Waiting Li	st 🗌	Damon, Matt (10103) 09/22/2014 3 Self						
	Select All Email Students							

Staff can register a Student if:

- a seat opens due to a cancellation (mailbox 2 receives an email indicating a cancellation for the class with a wait list)
- if the class size was increased or
- if the organization has decided to over-enroll the class.

Other wait list management abilities Staff have:

- Remove a Student from the waiting list.
- Move a Student from a Class wait list to a Course wait list in the instance to be considered for the next session.
- Ability to email Students in bulk when space becomes available to notify them they can complete registration on a firstcome-first-serve basis.
- Add a Student to the wait list, Student receives a ranking based on the order added. An automatic email notifies student when this occurs.

ith semicolon

Staff can override the wait list and directly register a Student for a class. Access
 *Registrations > Waiting Lists*, locate the Student and select *Register* and complete the
 transaction process. Or move the Student to the Course waiting list as previously
 described.

Registrations – Waiting List - Continued



A student can add his / herself to the waiting list.

Basic Cake Decorating			
CLFB-1005	Instructor : Denise Turner		
Tuition: \$89.00	Materials Cost: \$0.00	Member Cost: \$89.00	
Available Merchandise			
Schedule : Weekly - Tue 6:30 PM - 9:00 PM; 5 sessions; starting 5/1/2018, ending 5/29/2018			
			ADD TO WAITING LIST

### A Student can sign in and view their waitlist list.

my dashboard	my profile	current registrations	my transcript	my transactions	merchandise	
my waiting list						
<b>Class Waiting</b>	List					
Remove		Student Name (ID)	Class Name - Course #/Class ID/Section #			Rank
0		Steck, Larry (11771)	Basi	1		
No Course Waiting Lis	st					
No Course Series Wa	iting List					

From my waiting list view, the Student sees his / her rank on the list, and has the option to remove self from the wait list. Whether or not the Student can see their rank in the waiting list is set up under *Power User Settings* > *General Settings*.

#### Retention Activity:

After training, place some Students on a waiting list and manage the list by registration or removal. Then sign in as a Student and add yourself to a waiting list to experience the Student's view. You do not have to register in order of their placed rank.



# **Intermediate Instructors**

Email and Confirmations to Instructors

Objectives for Intermediate Instructors:

- Review email to Instructors using Lumens
- Process Instructor confirms for classes

This section of the workbook will focus on the follow up processes for Instructor communications.

Payment tracking and Instructor contracts comes later in training.

### Instructors > Instructor Confirms

The Instructor confirmation gives Instructors the opportunity to review their class content before Staff finalize the class (and if creating a catalog, before the catalog print).

Generate Instru	ctor Confirmations-Searc	h						-	
Term		•	Instructo	or	•		ct your se as approp		0
Catalog(s)	Combined Catalog Totals All Catalogs ed2go Online Courses Licensure/Recertification	•					list of cla		•
Category		Ŧ	Subcatego	Y	Ŧ				
Course Name			Course Numb	er					
Class Start Date on or After	mm/dd/yyyy	<b>#</b>	Class Start Date o or Befor		y 🗎				
	When searching using the class start open-ended classes will be returned b the 'staff registration begins' date set class	ased on							
Class ID/Section ID			Generate In	structor Con	firmations - Search				
	All Results to One Screen?				Choose only one action from	m the action column I.			
	Submit		Showing records 1	through 12 of 29.				_	
			Course Number	Catalog	Class Name (ID)	Start Date	Instructor		Action
			KTCO-3010e	All Catalogs	#1 Excel (27280)	1/1/2018	Abramson, Maurice	Email	Print
			123458	All Catalogs	Sarah s Online Test (27550)	2/26/2018	Abramson, Maurice	🗆 Email	Print
			KTCO-3010e	All Catalogs	#1 Excel (27288)	3/5/2018	Abramson, Maurice	Email	Print
			1010047	All Catalogs	Fall is Full of Color! (27287)	6/4/2018	Akers, Patricia	🗆 Email	Print

### Ripple Effect:

Using Instructor Confirm does not confirm an Instructor in Go/No Go feature.

### Retention Activity:

Customize the Instructor Confirmation template to give the tone of your organization. System Options > Template Management > Email & Print Templates > Instructor Confirmations



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# Intermediate Instructors

Email and Confirmations to Instructors - Continued



### Instructors > Email to Instructors

Staff can easily communicate with Instructors by emailing directly from your site.

Select Instruct	ors to E-Mail ·	Step 1	<ul> <li>Each filter narrows your results, click Submit</li> </ul>
Taught Class in Categor	у	~	to search.
Taught Class In Term		~	You can select
Taught Class In Location	n	~	individual Instructors or Select <i>All</i> , then click
Accounting Code Association		~	Submit.
Acctg. Code			
Taught Class in Catalog Instructor E-Mail Message for Instruct Please enter subject and message text, the * denotes required information. Subject * Reply-to * Message text *	ed2go Online C Licensure/Rece	Abramson, Maurice Adams, Howard Adkins, Chris Aguon, Paul Akers, Patricia Ambriz, Patrick Andersen, Maria	<ul> <li>Staff can enter the subject and message text, change the Reply-to and send up to 4 attachments.</li> <li>Instructor emails or any emails out of the system do not count against the daily quota.</li> </ul>
	Browse Maximum combined file size < 20MB Browse		
Attachment 2	Maximum combined file size < 20MB		

# **Intermediate Class Information**

Go / No Go

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Objectives for Intermediate Class Information:

- Discuss the Go/No Go feature in Lumens
- Manage the Action Items list
- Review Instructor Checklist
- Complete a class status change
- Describe the option to record attendance, grades, and CEU's
- Discuss the Release Forms feature in Lumens

This section of the workbook will focus on the tools located under the Class Information menu. We will go over the features and tools available in Lumens to help with various class management functions.

### Class Info > Go / No Go

The purpose of the Go / No Go tool is to help Staff determine whether to confirm or cancel a class. You should discuss how often this should be completed.

Go / No Go : Search for C	lasses	
Classes starting on or after *	mm/dd/yyyy	=
Classes starting on or before *	mm/dd/yyyy	=
Enrollment is: *	◎ Greater than or Equal to Go# ◎Less than Go# ◎All	
Class Type *	All classes	Ŧ
Term *	None specified	T
Category	Select Category	•
Subcategory	Select SubCategory	T
Class Status	Active Confirmed Run Cancelled	,
Schedule Type *	Scheduled      Open-Ended	
Catalog(s)	Combined Catalog Totals All Catalogs Licensure/Recertification Learn at Your Leisure	•
	Submit Cancel	

• You can choose to have the Go / No Go number calculated by either: the number of Student Registrations or by Class Receipts.

Other filter options:

• Enrollment is greater than / less than / or equal to *Go Number* 

• Class type (Classroom, online, hybrid)

• Schedule Type (scheduled or openended)

• By Catalog, if they are used.

# Intermediate Class Information

Go / No Go - Continued



In this example, the Go/No Go number for each class is determined by Student Registrations.

Go / No Go: Confi	Go / No Go: Confirm, Cancel or Delete Classes					
Use this screen to Confirm, Ca	ancel or	Delete o	lasses.			
<ul> <li>The 'Comments for All' field may be used for adding a comment for all Classes to be cancelled or deleted.</li> <li>The field which may appear below each Action list is used to supersede the 'Comments for All' field for that row.</li> <li>Select the 'Confirm All' link to set the Action setting for all Classes to Cancel</li> <li>Select the 'Delete All' link to set the Action setting for all Classes to Delete</li> </ul>						
Search Criteria			ting on or after 10/1/2014 through and including ule Type: Scheduled; Catalog(s): Adult Educatio		t: All; Class Type: All Classes;	Class Status:
Select	Go?	Go #	Class Name Course #/ClassID Start Date	# of Students/ on Waitinglist	Instructor Name	Location Name
×	]					
No change 🗸	Yes	6.00	Beginning Excel 6200004 / 11			
No change Cancel with Notice			10/1/2014	9/0	Cooper, Linda	Burnsville Diamondhead
Cancel without Notice Confirm		5.90	Octaves - Good or Bad 2500001 / 57			
			10/2/2014	5/0	<u>Green, Sandra</u>	Burnsville Diamondhead
No change 🗸	Yes	5.00	Nursing Assistant 6100007 / 104			
			10/6/2014	8/0	Finney, Josh	Multiple

Staff can view Go / No Go details to make a decision about the class:

- Hover over the class name to see specific class details.
- View number of Students registered and how many on the wait list
- Instructor name, contact information and whether confirmed / not confirmed

Actions the Staff can take from this screen include:

- Cancel with or without a notice, Confirm, or Delete (Delete is only available if there are no registrations).
- Changing the Status to Confirmed indicates the class will run.
- To speed up actions, Staff can select *all classes* from the select drop down list at the top of the page.
- The cancel or delete option requires Staff to enter a comment/reason for tracking purposes.

Cancel class with a notice sends an email to Students registered indicating the class was cancelled. Refer to Email Template: *Cancellation Notice-Student* 

Cancel class without notice to Student requires Staff to follow up with Students. Reference *Class Info* and click on Action Items.



Go / No Go Number can also be based on Class Receipts received from Student registrations. Before you can use this, you must have your settings set correctly. You will need contact Customer Service so they can turn it on for you. Once your configuration is modified, access:

System Options >	Power Users >	System Settings >	Class Set-Up Settings.
------------------	---------------	-------------------	------------------------

Close registration how many days prior to class start date? Send reminders to students before time-limited classes end?*	1 • Yes      No	Select defa     class costs to
Default time period before time-limited classes end*	Qty: 2 Interval:	calculate Go / Go number.
Default for Class Costs to Calculate Go/No Go Number?* Default Class Cost Multiplier Values:*	Weeks Instructor Costs Organization's Material Cost Class Prep Overhead Curr. Dev.	Add/Edit     names of clas     cost multipliers     and default     values.
Add Special	1.2	A cost     multiplier sets
Standard	1.0 Cancel	revenue amou to automate provide guidar in your Go / No

ault No

а nt ice 0 Go decision.

Add Course Expand All   Collapse All			
$\checkmark$	Cor	urse Information	
<ul> <li>denotes required information.</li> </ul>			
Course Name*			
Category Name*	Spell Check Select Category	Subcategory Name*	Select SubCategory
Alternate Subcategories	Ose jpg, gri, prig nie iormas, recommend max ooke		
Add Listing Icon	Choose File No file chosen	Listing Icon Alt De	scr.
Proof-of-Completion Template	Recommend approx. 15x15 png file format, <50KB None Selected	T	
Evaluation	News Colorian	-	
Class Cost Multiplier*		Cost Multiplier*	0.00

You can determine at the course level, which cost multiplier value to use. (In the above example, you can choose Standard with a cost multiplier of 1.0, or Special with a cost multiplier of 1.5, which will display.) You can edit these cost multipliers at the class level if needed, but they default as set here.

# **Intermediate Class Information**

**Class Management Action Items** 

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#### Class Info > Action Items

Class Manag	ement Action Items			
Term	~	Instructor		~
Course Name		Course Number		
Class Start Date on or After	<b></b>	Class Start Date on or Before		
Category	Select Category ~	Subcategory	Select SubCateg	ory 🗸
Class ID/Section ID	Search Cancel			
	ve recently been confirmed or cancelled. C ick Clear Checklist to drop the class from		ew or print an action c	hecklist for the
Action	Class ID:Nam	ie	Start Date	Status
Action -	27287 : Fall is Full of Color!		06/04/2018	Cancelled
Action -	27562 : Prevention 101		07/19/2018	Cancelled
Action -	27279 : Basic Cake Decorating		05/01/2018	Confirmed
Action -	27284 : Art Making: Fine Art Sampler		05/21/2018	Confirmed

The Action Items are in order by class status. Cancelled classes are listed first, then Confirmed, then Run.

Staff should manage cancelled classes as soon as the decision is made. Ensure you have cancelled all class registrants (or transfer Students to another class session or a different type of class), cancel any room reservations, and notify the Instructor.

Confirmed classes display to allow Staff to contact the location and Instructor when you confirm a class. In addition, Staff can send a manual email to the Students with up to four attachments.

This page allows you to:

- View / print the checklist to keep a record of actions taken.
- When all necessary actions are complete, you can remove the class, clearing the checklist. If not cleared, the list remains for 60 days after the class has completed
- You can send email notes such as 'Thank you for attending X class' or notifying Students of a room change, etc.

**Class Management Action Items – Continued** 



### The Cancelled Class Checklist may be printed.

Canceled Class Checklist			
Back to Classes			
Class Information:			
Course/Class Number: 62000	002/53		
Class Name: Access II			
Start Date: 10/07/2014			
Time: 6:00 PM - 8:00 PM			
Cancelled Date: 09/23/2014			
Have you called the instru	ctor? Completed By:	Completed On://	
Jim Berkman			
Phone(s): 612-555-7894 (Day) 612-999-5888 (Evening)			
jberk@augusoft.net			
Have you confirmed the lo	cation? Completed By:	Completed On://	
Armstrong High School			
Classroom: 110B			
3618 36th Ave North			
Plymouth, MN 55441			
Contact Person: Susan Hanso	n		
8662897043 (Day)			
Student Name	Phone	Called This Student?	
Alexieff, Paul	612-888-9999 (Day)	Completed By: Completed On:/ Refund Method:	
Chase, Wiliam	777-458-9658 (Day)	Completed By: Completed On: Refund Method:	
Olson, Eddie	866-289-7043 (Day)	Completed By: Completed On: Refund Method:	

• The Checklist displays contact information for Instructor, Location, and Students.

• Instructor needs to be notified.

• Room to be cancelled.

• Contact the Students to either notify them of the cancellation (phone number readily displayed) and / or contact them about transferring to another session.

	<b>Confirmed Class Checklist</b>	
Back to Classes		
Class Information:		
Course/Class Number: 6100007/104		
Class Name: Nursing Assistant		
Start Date: 10/06/2014		
Time: 8:30 AM - 4:00 PM		
Confirmed Date: 09/24/2014		
Have you called the instructor?	Completed By:	Completed On://
Josh Finney		
Phone(s): 612-888-5555 (Day)		
jfinney@augusoft.net		
Have you confirmed the location?	Completed By:	Completed On://
Apple Valley-DCTC		
Classroom: 220		
14200 Cedar Avenue		
Apple Valley, MN 55124		
Contact Person: Gloria Kowalczyk		
612-555-7474 (Day)		
L		

• Provides Staff with contact information for Location and Instructor, allowing Staff to easily communicate a confirmed class.

• The 'Run' Class checklist displays the same information.

**Class Management Action Items – Continued** 

Each Student is preselected in the Email to Students, allowing Staff to uncheck any Student as needed. This feature is very effective for cancelling a class without notice; however, we recommend Staff contact each Student directly to increase the chances of transfer or new registrations.

Send E-Mail Message to Students Step 2				
You may send 100 additional e-mail messages to students today.				
There are 3 students with valid e-mail addresse	There are 3 students with valid e-mail addresses shown on this display.			
All of the students that met your search criteria have a valid e-mail address.				
Student Send E-Mail?				
Alexieff, Paul	$\checkmark$			
Chase, Wiliam	$\checkmark$			
Olson, Eddie				
Unselect all Emails				
Submit				

• The Students won't display if you already cancelled them.

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• If you previously cancelled the <u>class with a notice</u>, those Students have already received the <u>Email Template</u>: Cancellation Notice-Student.

E-Mail M	essage for Students	•
	t and message text, then press Submit. An e-mail will be sent to all students enrolled in the class who have address with this site.	r r
	* denotes required information.	
Subject*		ę
Reply-to*	ceu@u.edu	
CC	Una@augusoft.net (Add additional email address separated with semicolon)	•
Message text*		r
	^	(
		(
	~	
Attachment 1	Browse	
Attachment 2	Browse	(
Attachment 3	Browse	5
Attachment 4	Browse	á
	Submit	r

- Upon *Submit,* or send, the same <u>email</u> <u>message for Student</u> is sent.
- This is considered a manual email and does count against the daily quota.
- The automatic Cancellation Notice-Student does not count against this type of message.

### Try It!:

You confirmed and cancelled a class earlier. Now take a moment, look up each class, and review the checklist. When you are done, and because we are not printing the document for this example, clear the confirmed class checklist, but leave the cancelled class checklist intact, as you may want to review it later.



# **Intermediate Class Information**

Instructor Checklist

### Class Info > Instructor Checklist

Often, the class has been added months in advance and the Instructor may have been tentative or unassigned upon creation of the class. The Instructor Checklist allows Staff to track confirmation of the Instructor, confirming the Instructor has been secured for the class assigned.

Confirm Instructor • denotes required information.				
When searching using the class start dates, open-ended classes will be returned based on the 'staff registration begins' date set on the class.				
Classes starting on or after *	mm/dd/yyyy	<b>m</b>		
Classes starting on or before	mm/dd/yyyy	Ħ		
Catalog(s)	Combined Catalog Totals All Catalogs ed2go Online Courses Licensure/Recertification	* *		

<u>Additional Reference:</u> QRA available in *Customer Support > Document Center > Quick Reference Library > Instructor Checklist* 

<u>Ripple Effect:</u> Using the Instructor Checklist does confirm an Instructor in the Go / No Go feature.



# **Intermediate Class Information**

Class Status Change

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### Class Info > Class Status Change

This feature allows Staff to change a class status manually.

Change Class S	tatus							Oliale Obanava
Term			•	Instructo	r		۳	<ul> <li>Click Change Status</li> </ul>
Course Name	cake			Course Numbe	r			010103
Class Start Date on or After				Class Start Date or or Before				
Category	Select Category			Subcategor		gory		
Class ID/Section ID								
	Search Clea	ar						
Showing records 1 through	gh 12 of 16.							
	Class Nan	ne		Status	Class Start Date	Action		
Basic Cake Decorating (65				Run	11/19/2010	Change Status		
Intermediate Cake Decorat				Deleted	09/16/2010	Change Status		
Basic Cake Decorating (19				Run	11/15/2011	Change Status		
Basic Cake Decorating (27) Best Cupcakes and Fillings				Active	05/01/2018	Change Status Change Status		
Dest Cupcakes and Plinings	(1001)			Cancelled	02/20/2010	Change Status		1
Change Class Status • denotes required information. Class Name Basic Cake Decorating (27279) (Section 3)  • From drop down, select the new status.								
	Class Start Date	5/1/2018					3010	cet the new status.
	Current Class Status	Active		Change Class	Status • denotes require	d information.		
	New Class Status	Active		_	Class Name	Basic Cake Decorating	g (27279)	(Section 3)
		This class is has active	a ronistrati	in	Class Start Date	5/1/2018		
		Next Cancel			Current Class Status	Active		
					New Class Status	Cancelled		Ŧ
						This class is has active	e registrat	ions. Delete options is not available
<ul> <li>When</li> </ul>	n Staff cha	inges a			Change Reason			
class	status to	cancel, if						
class	has regis	trants, a						18
pop-u	up opens.					Submit Back		
<ul> <li>By clicking OK, the class is cancelled, and automatically moves to Classical Statement of Statem</li></ul>					lass Info	these registrati	ons be	egistrations. Would you like to transfer or cancel fore making this change? Click <ok> to nange otherwise click <cancel>.</cancel></ok>
<ul> <li>Students do not receive any notification when this type of change is processed.</li> </ul>								OK Cancel
• This	tool is very	/ seldom u	sed.	. It is primai	rily for			
adjus	sting the st	atus temp	orari	ly to fix an	error.			
Ripple Effect	<u>t:</u>							

Class confirms from this screen <u>do not</u> generate Student reminder emails.



Record Class Grades, Attendance, and CEUs

### Class Info > Record Attendance

Class Meetin Attendance	g Selection	for Becon	ne a Certif	ied Mediate	or in Four Days		
Class Name (ID): Contact Hours Class Schedule:	Become a Certi 20.00 Schedule Informa	fied Mediator in F tion:	Four Days (2726	66)			Attendance will
	Instructional Method	Dates	Class Days	Times	Location	Instructor(s)	display for any session
	Classroom	1/10/2018-1/13/2018	Weekly - Wed, Thi Fri, Sat	u, 9:00 AM - 2:00 PN	Cedar Rapids, The Kirkwood Center Map	Steve Sovern JD	that has past.
Class Meeting		Class H	lours	Attendance	Recorded	Select?	
1/10/2018 Wednes PM) - Classroom		00 5.00		-		check all	<ul> <li>The number of hours is based on the class schedule.</li> </ul>
1/11/2018 Thursda PM) - Classroom	ay (9:00 AM - 2:00	5.00		-			
1/12/2018 Friday ( Classroom	9:00 AM - 2:00 PN	<i>I</i> ) - 5.00		-			Class hours can be changed for the entire
1/13/2018 Saturda PM) - Classroom	y (9:00 AM - 2:00	5.00		-			session here.
			Back Sul	bmit			

Class Name (ID):       Become a Certified Mediator in Four Days (27266) (ID):         Class       Weekly - Wed, Thu, Fri, Sat 9:00 AM - 2:00 PM; 4 sessions starting 1/10/2018, ending 1/13/2018 Schedule:         Instructor(s):       Richard Hamilton Contact         Learner ID       Student name Mednesday       1/11/2018       1/12/2018       1/13/2018         Wednesday       Thursday       Friday       Saturday         Classroom       Classroom       Classroom       Classroom         55161       Hoemberg Sarah       5.00       5.00       5.00	
Class Weekly - Wed, Thu, Fri, Sat 9:00 AM - 2:00 PM; 4 sessions starting 1/10/2018, ending 1/13/2018 Schedule: Instructor(s): Richard Hamilton Contact 20:00 hours: Learner ID Student name 1/10/2018 1/11/2018 1/12/2018 1/13/2018 Wednesday Thursday Friday Saturday Classroom Classroom Classroom	
Contact 20.00 hours: Learner ID Student name 1/10/2018 1/11/2018 1/12/2018 1/13/2018 Wednesday Thursday Friday Saturday Classroom Classroom Classroom	
Wednesday Thursday Friday Saturday Classroom Classroom Classroom Classroom	
55161 Hoemberg Sarah 5.00 5.00 5.00 5.00	
33079 Regan Dolores 5.00 5.00 5.00 5.00	
48911 Segal John 5.00 5.00 5.00 5.00	
35381 Vega Brenda 5.00 5.00 5.00 5.00	
Submit	

• Check applicable students to record attendance.

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• Enter absences. If Student(s) absent record time attended.

Record Class Grades, Attendance, and CEUs

### Class Info > Class Grades

Record grad	des									1
Class Name (ID): B Class Schedule: Schedule Informatior		Mediator in F	our Days (	27266)						
Instructional Method		Class Days		Times	Location	1		Instructor(s)		
Classroom	1/10/2018-1/13/2018	Weekly - Wed,	Thu, Fri, Sat	9:00 AM - 2:	:00 PM Cedar Ra	pids, The Kirkwood (	Center Map	Steve Sovern JD		Staff can
* - Quantity registra	ation									record grades current, future
<ul> <li>If 'record</li> </ul>	led by' column is led by' column is rent value.	empty then not empty, t	modificati hen 'recor	ons on tha rded by' co	at row will be s blumn on that	aved only if a 'g row will be upd	grade' is e ated only	entered. if the 'grade' is ch	anged	<ul> <li>Assign grato and past class</li> <li>Assign grato and regist</li> </ul>
Learner ID	Stude	nt name	$\bigcap$	Gr	rade	Rec	orded by	Reco	rded on	to each regist
55161	Hoemberg, Sa	rah								
33079	Regan, Dolore	5								
48911	Segal, John									
35381	Vega, Brenda									
				Submit	Back					
Record gra Class Name (ID): Class Schedule: Schedule Informat Skip dates: Complete within 4 mo	Alternating Curr	ent (26942)								Online & Ope
Instructional Meth		Days Times	Location		Ins	tructor(s)				Ended classe
		1	Ainsworth, C	Conservation	Center Map					Grades is
* - Quantity regis	tration									where you wi
<ul> <li>If 'record</li> </ul>	orded by' colum orded by' colum ied from current	n is not emp	nen modif ty, then 'r	fications o recorded t	on that row wi by' column or	ll be saved onl a that row will b	y if a 'gra be update	ide' is entered. ed only if the 'gra	de' is	document cla completion da hours (based what is entere the class), an
	dent Start me	Date C	Completio	on Date	Time Limit Expiration Date	Hours Attended	Grad	e Recorded by	Recorded on	grades.
3804 Aaron Peter	4/23i	i	m/d/		8/23/2015			SuperAdmin	4/23/2015	
32228 Scott, Asley	4/9/2		m/d/		8/9/2015			SuperAdmin	4/9/2015	
				Submit	Back					

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## **Intermediate Class Information**

Record Class Grades, Attendance, and CEUs - Continued



### Class Info > Record CEUs

Classes with CEUs Class Name (ID) AJAX Web Applications (27022)	Course Number CCPS-1500	End Date 02/11/2016	<b>CEUs</b> 1.76	Action Award CEUs	Choose the Award CEUs for applicable class	r the
			Back to C	EU Class Search		
CL Sc CE Cc	ward Class CEUS ass Name (ID): AJAX Web A hedule: Weekly - Mon, Tue, Us for this class: 1.76 intact hours for this class: 6 udents that registered using a	oplications (27022) Fhu 5:30 PM - 9:30	PM; 15 ses	sions starting 1/11/2016, ending	2/11/2016	
		Name (ID)		Hours attended/ Hours absent	CEUs Awarded	
At	adie, Johnny (34288)			/	1.76	
At	oba, Nicole (53744)			1	1.76	
			Submi	t Cancel		

- Requires CEU entry when class is created.
- Class CEU number is listed under the award (can be modified)
- Click Submit to award.

Instructors can be given permission to record attendance and grades

Additional Reference: QRA available in Customer Support > Document Center > Quick Reference Library > Instructor Aid: Record Attendance and Grades Grades, Attendance, and CEUs

**Ripple Effect:** Data from these features are included in Student transcripts available in Lumens.





# **Intermediate Class Information**

Release Forms

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#### Class Info > Release Forms **Release Forms** Blue type denotes required information. Include forms completed on or after ..... Search for a mm/dd/yyyy • specific online Include forms completed before mm/dd/yyyy ..... release form completed during Release Form None specified $\sim$ the registration Term None specified $\sim$ Select Results Sort Student Name $\sim$ Yes O No O Show Cancelled/Transferred Students? Release Forms Student Name Certificate/Class/Course Series Print Form Completed On Form? Aaron, Michelle 75-hour Nurse Aide / 27006 10/20/2015 Testing 4 - Go/No Go Example / 26989 Aaron, Michelle 11/10/2015 Testing 4 - Go/No Go Example / 26989 09/09/2015 Aaron, Ruth Aaron, Ruth 75-hour Nurse Aide / 27006 11/16/2015 #1 Lead Abatement Contractor Test / 26964 07/08/2015 Cage, Amy Cain, Anthony #1 Lead Abatement Contractor Test / 26964 07/08/2015 Hoemberg, Sarah #1 Lead Inspector/Risk Assessor Test / 27142 10/14/2016 Test, Sarah Testing 4 - Go/No Go Example / 26989 09/01/2015 Submit Reset

### Release forms are created in System Options > Power User > Release Forms Management

🔻 Release Form Management	
	Add Release Form
Conference	Edit/View Inactivate
Health	Edit/View Activate
Kids College	Edit/View Inactivate
Meal Preference	Edit/View Inactivate
Photo Waiver	Edit/View Inactivate

Additional Reference:

QRA available in Customer Support > Document Center > Quick Reference Library > *Release Forms.* A webinar available in Customer Support > Document Center > Lumens LITE > *Release Forms webinar* 



Intermediate System Options Review

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

Objectives for Intermediate System Options:

- Review and develop templates for webpages
- Add an optional field
- Discuss user roles
- Define and create a promotion



To complete this review, use the Intermediate System Options 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?).

Promotions created apply to the entire \_\_\_\_\_\_.

New User Roles are not	to set u	p a Staff	profile.
New User Noies are not.	10 361 0	p a Stan	prome

There are 4 types of form fields for the Optional Fields. They are

To push an optional field out to your Lumens site, you must click on the

To ensure optional fields display in reports after creation you must first then return

to the optional fields view and click "Activate optional fields for reports."

Intermediate System Options Review Key

Review answer key:
Promotions created apply to the entire <u>shopping cart</u>
New User Roles are not <u>required</u> to set up a Staff profile.
There are 4 types of form fields for the Optional Fields. They are <u>Select Box, Multi-Select</u> <u>Box, Radio button, and Text</u> .
To push an optional field out to your Lumens site, you must click on the <u>Generate HTML code for all form fields</u> link
To ensure optional fields display in reports after creation you must first <u>populate the field in at least one</u> <u>location</u> then return to the optional fields view and click "Activate optional fields for reports."
Additional Reference: Customer Support > Document Center > Quick Reference Aids >
Create and Edit User Roles

Intermediate Course Management Review

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

**Objectives for Intermediate Course Management:** 

- Add discounts to a course and class
- Create an Online Course
- Add a lesson release statement in Lumens



To complete this review, use the *Intermediate 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 discount is available based on additional information added to the Learner profile?
- o Attribute Discount
- Code discount
- Date Discount
- Early Bird Discount

2. **T/F:** An open-ended course offers both a Self-Paced and Time Limited option during class creation.

3. T/F: Staff adds Class discounts initially at the class level.

4. What are the 'time period' options for an Open Ended - Time Limited class?

- Day(s)
- $\circ$  Week(s)
- Month(s)
- o All of the Above

5. **T/F:** If you create a 'lesson release time" statement, Lumens offers you two options; 'at your own pace' and 'weekdays.

Intermediate Course Management Review Key

Review answer key:

Expected Results	Related Information
Which discount is available based on additional information added to the Learner profile? • Attribute Discount	
An open-ended course offers both a Self-Paced and Time Limited option during class creation. <b>True</b>	
Staff adds Class discounts initially at the class level. False	False: Discounts are added at the course level and are applied to new classes if desired.
What are the 'time period' options for an Open Ended - Time Limited class?	
If you create a 'lesson release time" statement, Lumens offers you two options; 'at your own pace' and 'weekdays. <b>False</b>	False: Lesson Release Time text can be any item you chose. It can be added and inactivated as needed.

<u>Additional Reference:</u> Customer Support > Online Training > **Course Creation Online Open-Ended** 



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### Intermediate Student Management Review

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

**Objectives for Intermediate Student Management:** 

- Discuss Memberships
- Define and review Student emails and confirmations
- Locate and review catalog requestors

To complete this review, use the Intermediate Student Management 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?).

A catalog requestor can be converted to \_\_\_\_\_

Catalog requests go to \_\_\_\_\_

Using the email Student function allows Staff to enter a \_\_\_\_\_\_ email to the Student(s) registered for a particular class.

Student confirmations are viewable as both \_\_\_\_\_\_.

Intermediate Student Management Review Key

Review answer key:
A catalog requestor can be converted to <u>a Learner profile</u>
If a person submits a catalog request on the website, these request go to which mailbox <u>Organization Catalog Request Mailbox</u>
Using the email Student function allows Staff to enter a <u>manual</u> email to the Student(s) registered for a particular class.
Student confirmations are viewable as both <u>email &amp; print</u> .
<u>Additional Reference:</u> Customer Support Menu > Document Center > Lumens Lite > What a (catalog) Production

Intermediate Registration Management Review

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

Objectives for Intermediate Registration Management:

- Process a transfer and a cancelation of a class
- Review the late registration process
- Place Students onto a waiting list
- Discuss voided registrations

To complete this review, use the *Intermediate Registration Management Module* as a resource.

- > The review has four 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 processes does the Staff have the ability to manage in the waiting list functionality?

- Register
- $\circ$  Remove
- Email Students
- All of the Above

2. The service fee on a transfer/cancel is based on what Lumens functionality?

- o Materials Fee
- o Program Fee
- o Registration Fee
- Refund Policy Fee

3. T/F: A class is in 'run' status when you use the late registration option to register a student.

4. When Staff issues a refund, which part of the transaction process does the maximum override refund variance affect.

- o Changing the Service Fee
- o Changing the Refund Amount
- Changing the Refund Method
- None of the Above



Intermediate Registration Management Review Key

Review answer key:

Expected Results	Related Information
<ul> <li>Which of the following processes does the Staff have the ability to manage in the waiting list functionality?</li> <li>All of the Above</li> </ul>	
The service fee on a transfer/cancel is based on what Lumens functionality? • Refund Policy Fee	
A class is in 'run' status when you use the late registration option to register a student. True	
When Staff issues a refund, which part of the transaction process does the maximum override refund variance affect <ul> <li>Changing the Refund Amount</li> </ul>	



<u>Additional Reference:</u> Customer Support > Document Center > Lumens Lite > **Cancel or Transfer** 



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Intermediate Instructors Review

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

Objectives for Intermediate Instructors:

- Review emailing Instructors using Lumens
- Process Instructor confirmations for classes

To complete this review, use the Intermediate Instructors Module as a resource.

- > The review has three statements below.
- Add the missing information.
- Compare your responses against the answer key (how did you do?).

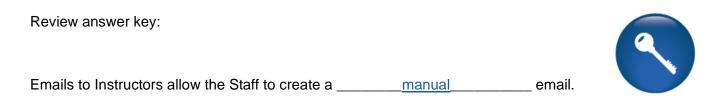


Emails to Instructors allow the Staff to create a \_\_\_\_\_\_ email.

Instructor confirmations provide an opportunity to have the Instructor peruse the class content before the \_\_\_\_\_\_.

The 'emails to Instructors' does not affect the number of

Intermediate Instructors Review Key



Instructor confirmations provide an opportunity to have the Instructor peruse the class content before the <u>Catalog is created</u>.

The 'emails to Instructors' does not affect the number of <u>daily emails the Staff can</u> <u>send</u>.

<u>Additional Reference:</u> Customer Support Menu > Document Center > Quick Reference Library > Instructor Email to Students



Intermediate Class Information Review

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

Objectives for Intermediate Class Information:

- Discuss the Go/No Go feature in Lumens
- Manage the Action Items list
- Review the Instructor Checklist
- Complete a class status change
- Describe the option to record grades, CEU's, and attendance
- Explain the Release Forms feature in Lumens

To complete this review, use the Intermediate Class Information 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 Action Items checklist is a \_\_\_\_\_

You can send emails directly to registered students using the email Students feature in the

The Go/No Go tool allows you to \_\_\_\_\_\_ generates the Learner reminder email to Learners. \_ and

The Go/No Go tool provides Staff with

Intermediate Class Information Review Key

Review answer key:	
Class confirmation completed using the <u>Class Status Change function</u> send out an automated reminder email.	_ does not
The Action Items checklist is aPrintable Tool	
You can send emails directly to registered students using the email Students feature <u>Action Items view</u> .	in the
The Go/No Go tool allows you to <u>confirm a class</u> generates the Learner reminder email to Learners.	_ and
The Go/No Go tool provides Staff with the go/no go number, and the regist Student number and the recommendation of whether to run the class or cancel	<u>tered</u>

<u>Additional Reference:</u> Customer Support Menu > Document Center > Quick Reference Aids > **Go/No Go Tool** 



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