Augusoft®

Lumens PRO Level 2 Program – For Lumens iPRO

Lumens Intermediate

Contents

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

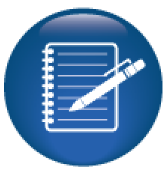
Level 2 Program Overview

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.

Information indicates informational items, things to consider as you set up your site, tips based on best practices or common practices of other Lumens customers.



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

Questions indicates questions for review and 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.

Intermediate System Options

Template Management

iPRO PRO CLTV STND

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

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

Ability to insert hyperlinks, images, tables.

Power User access not required.

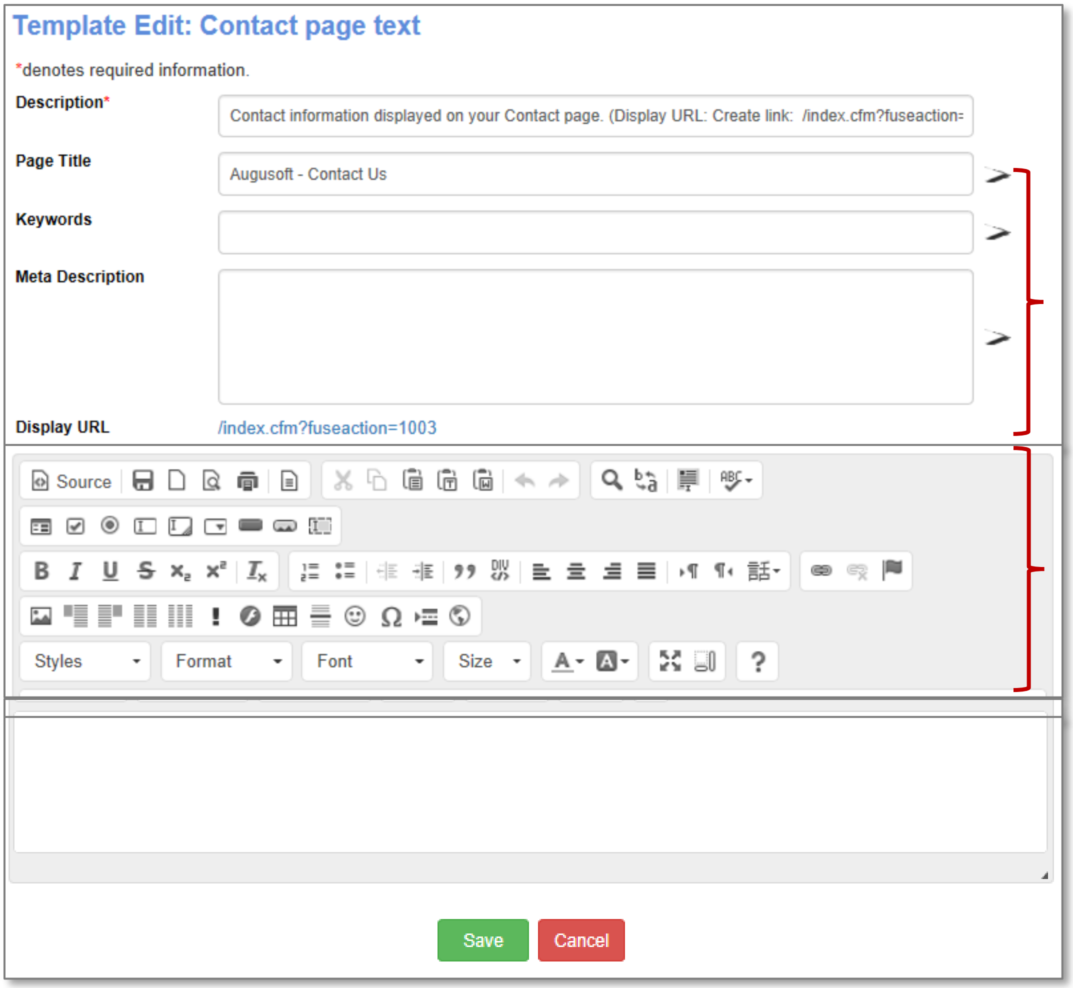
Some things to think about as you design your templates:

- 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?

Intermediate System Options

Template Management – Continued

iPRO PRO CLTV STND



Arrows can be opened to reveal details and maximum field options.

Toolbar offers standard word processing and in addition, fields for IFrame, Flash, and various developer tools such as button builds.

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.

Intermediate System Options

Template Management - Continued

iPRO PRO CLTV STND

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

Some webpages are available only <u>if</u> 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.

<u>Question</u>:
Does your team have an idea of how you want your site to look? If not, what are your thoughts? Record below.

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<u>Additional Reference</u>:
QRA available in *Customer Support* > *Document Center* > *Quick Reference Library* > ***Webpages-Adding Images, Links, and Anchors***

<u>Retention Activity:</u>

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?

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*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.

Intermediate System Options

Template Management – Continued

iPRO PRO CLTV STND

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

Staff may insert data elements (dynamic text) into the templates. Only 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 if you are using the functionality. For example, the *Gift Card Notification* and/or *Online Class Templates.*

Question:
Who will take ownership of your templates on your site?

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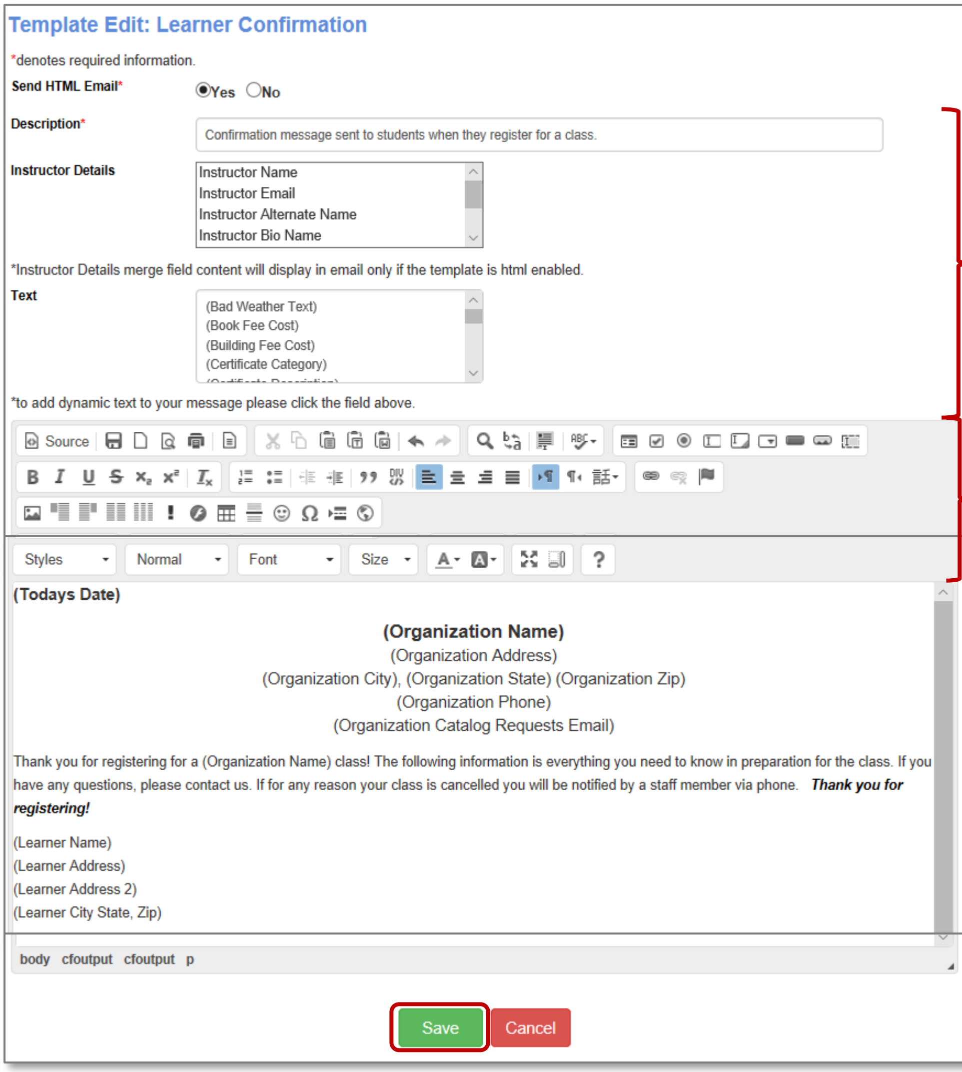
Retention Activity:
Between sessions, each person should take at least one email template and modify the text and test it. Try with the following templates; Learner Confirmation (test by registering for a class), Class Reminder (test by manually sending a class reminder), Forgot Password (test by clicking 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).



Send HTML Email no = sending email in plain text

Instructor Details = X

Text = These are the dynamic text fields available for this email (each are modified to the intended audience)

Tool bar = Much like the Web Page template.

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

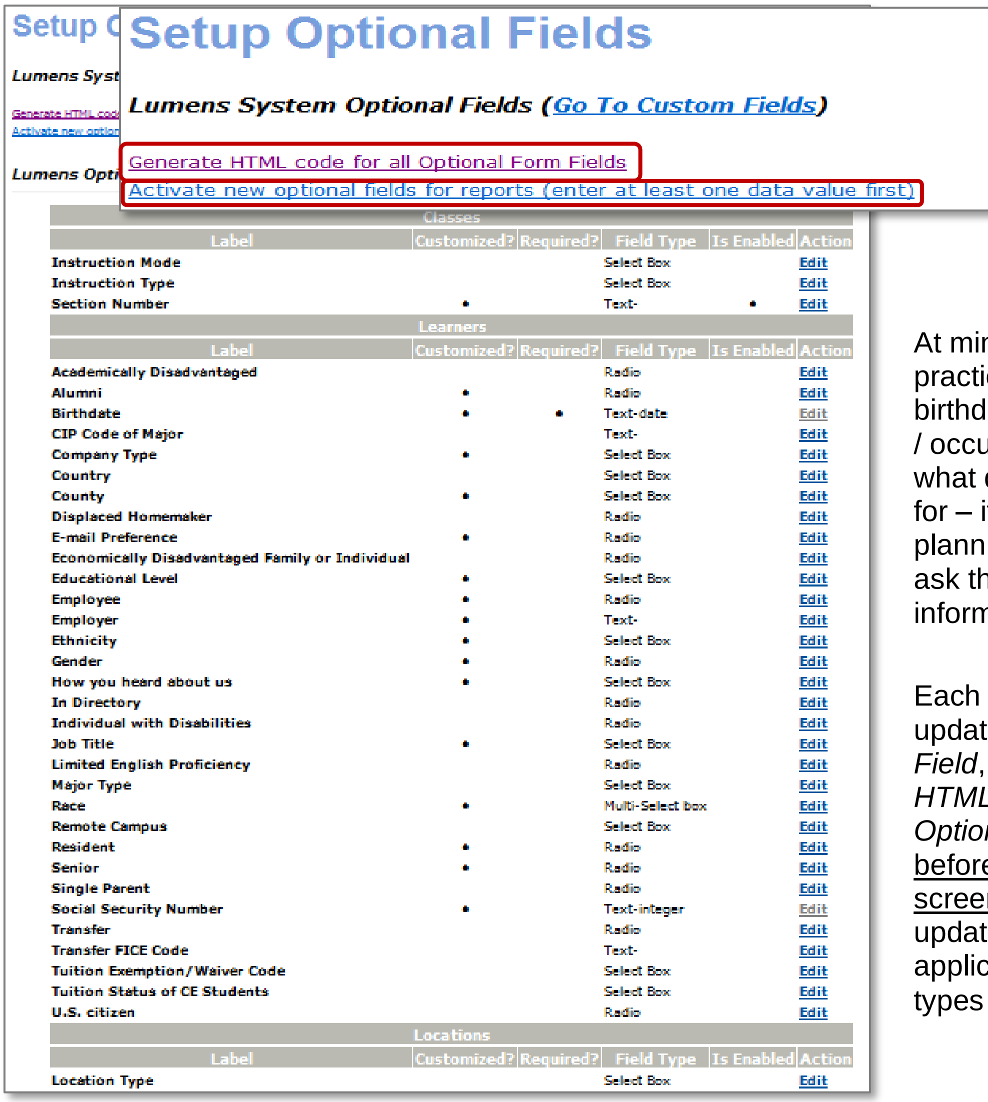
  e.g. Organization Name is located in System Preferences,
  Learner name comes from the learner profile of the registrant.

<u>Ripple Effect</u>:

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.

*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.*



Setup Optional Fields

Lumens System Optional Fields (Go To Custom Fields)

Generate HTML code for all Optional Form Fields

Activate new optional fields for reports (enter at least one data value first)

Lumens Optional Fields

Label	Customized?	Required?	Field Type	Is Enabled	Action
Classes					
Instruction Mode			Select Box		Edit
Instruction Type			Select Box		Edit
Section Number	•		Text-	•	Edit
Learners					
Academically Disadvantaged			Radio		Edit
Alumni	•		Radio		Edit
Birthdate	•	•	Text-date		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	•		Radio		Edit
Economically Disadvantaged Family or Individual			Radio		Edit
Educational Level	•		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	•		Multi-Select box		Edit
Remote Campus			Select Box		Edit
Resident	•		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					
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 before leaving this screen. 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.

Intermediate System Options

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

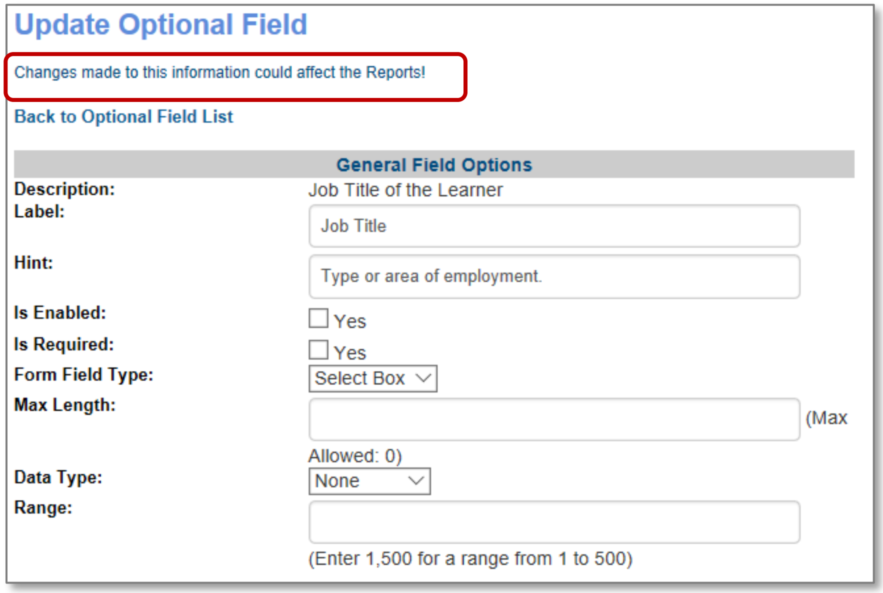
When there are field values involved, Lumens will display an additional column to reflect the coordinating ERP code

Field Values					
Field Text	Field Value/Code	ERP Code	Sort Order	Default	Display
Add new row					
None specified			1	◉	☑

Intermediate System Options

Optional Field Set Up - Continued

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.



Label: this is editable to provide an accurate description of the field.

Hint: Displays below the field for users.

Is Enabled: *Yes*, will activate on the website.

Is Required: If *Yes*, will display a red asterisk *****, indicating it is required.

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. NOTE: to ensure encryption, you must contact Augusoft.

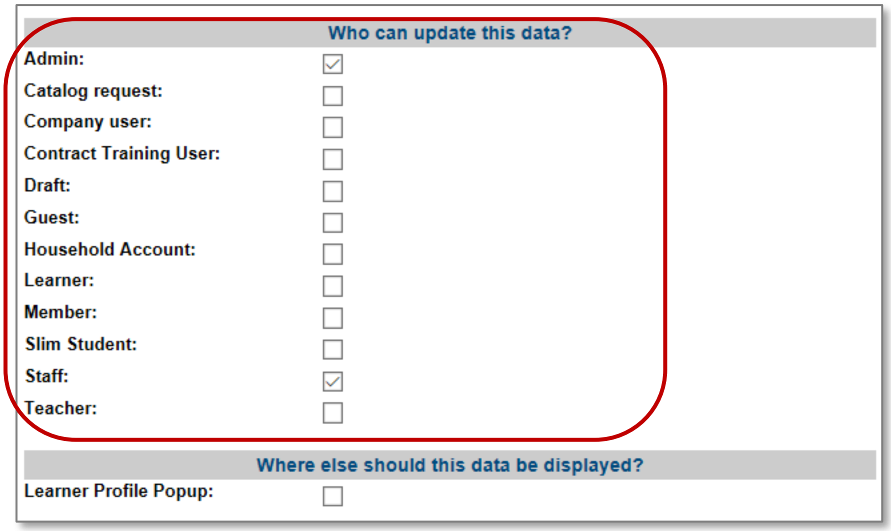
To create a social security field on the Leaner Profile, Staff must enable *Alternative Learner ID* in *Optional Fields* and change the label (to Social Security Number). If using SSN, it is important to store the field as encrypted data. To encrypt, the field must be unique.

Intermediate System Options

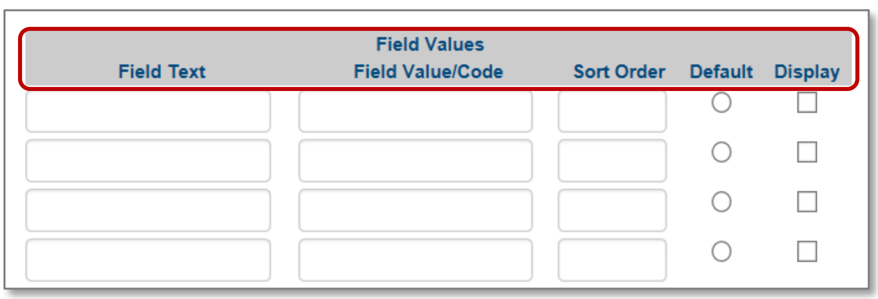
Optional Field Set Up - Continued

iPRO PRO CLTV STN

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, no one can see the field on the record.



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: Available if the form field is set up as Select Box, Multi-Select Box, or Radio (previous page). NOTE: 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:

Intermediate System Options

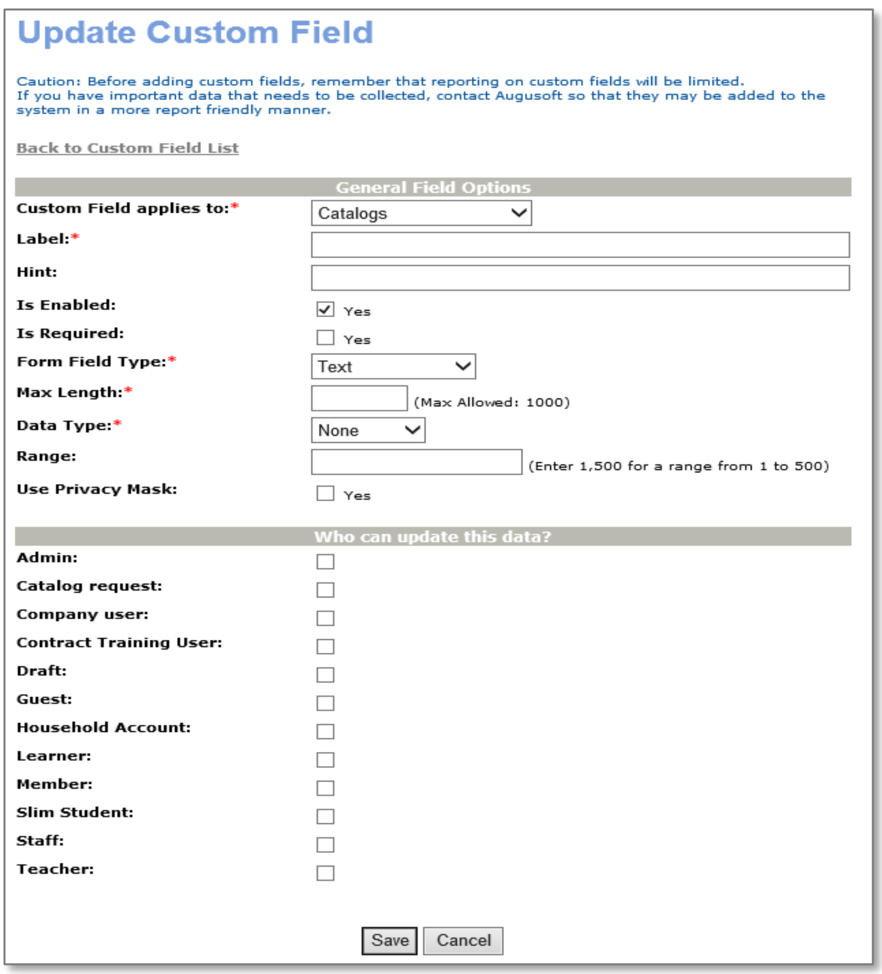
Optional Field Set Up - Custom

iPRO PRO CLTV

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

Click, *Add Custom Field.*

Custom Fields are like Optional Fields in functionality.



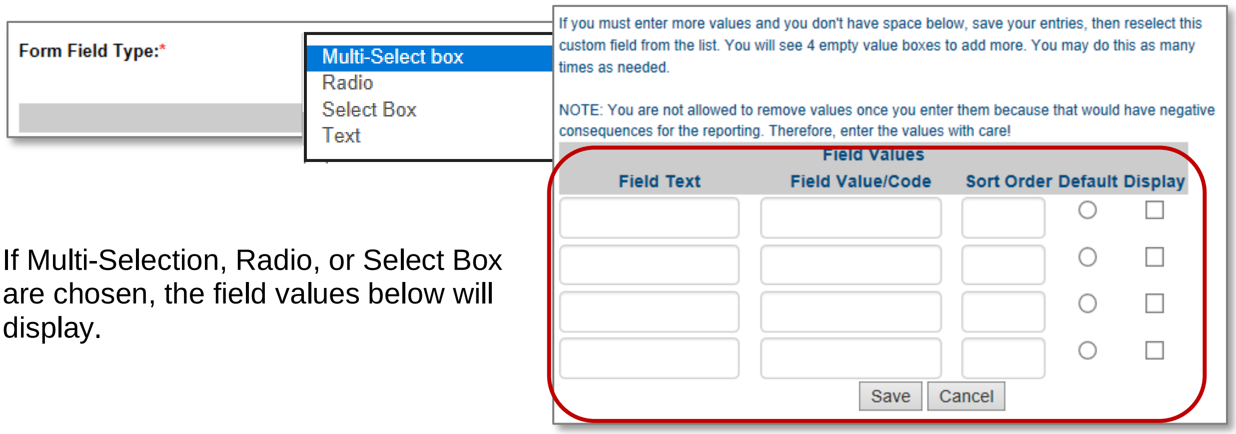
Custom Field applies to:
You can multi-select what records this applies to, such as:

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

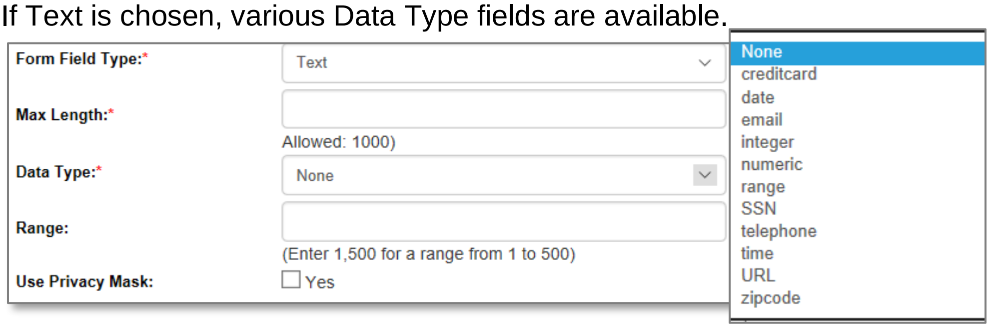
Customer Fields can apply to many different areas in Lumens. Some fields, such as catalogs, program sections, and contract training will not apply if the feature is not active on your site.

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

If Multi-Selection, Radio, or Select Box are chosen, the field values below will display.



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



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.

<u>Ripple Effect:</u>
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 fields</u> in any given profile type (i.e. Learners, classes, catalogs) etc.).

Lumens iPRO Customer Information

- Colleague
- PeopleSoft
- Banner

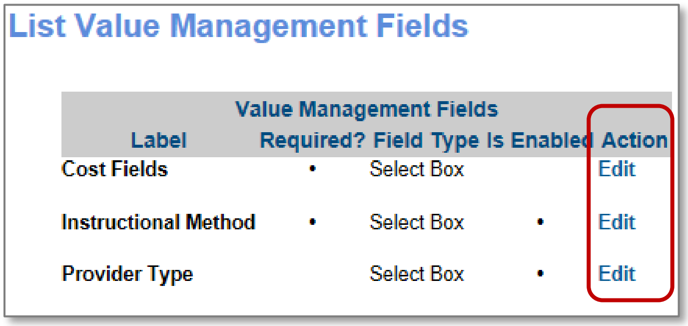
When activating fields in Lumens, those with radio, select, or multi select will display field values. The first column of field values is a Lumens Value, this must have an entry. The second column is the ERP code. This code will match the ERP and is what ensures the information is integrated.

Field Values					
Field Text	Field Value/Code	ERP Code	Sort Order	Default	Display
Add new row					
None specified			1	◉	☑

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

*System Options > **List Value Mgmt***

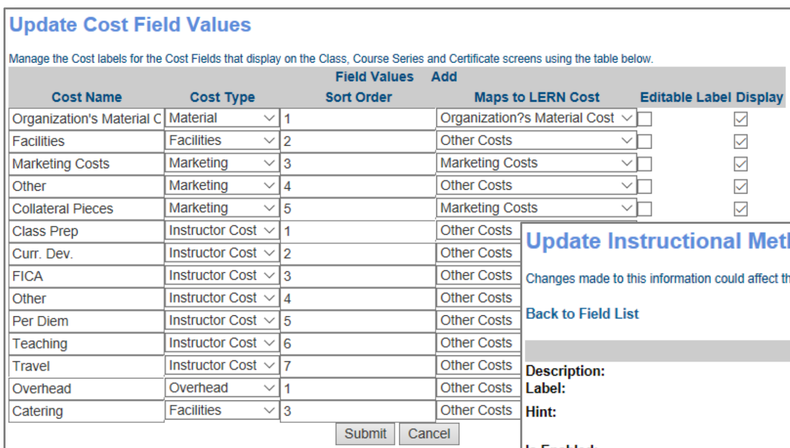
List Value Management allows Staff to customize the field text for different lists found within Lumens. Currently available are *Cost Fields, Instructional Methods, and Provider Type*. Click *Edit* to view the list.



List Value Management Fields

Label	Required?	Field Type	Is Enabled	Action
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.

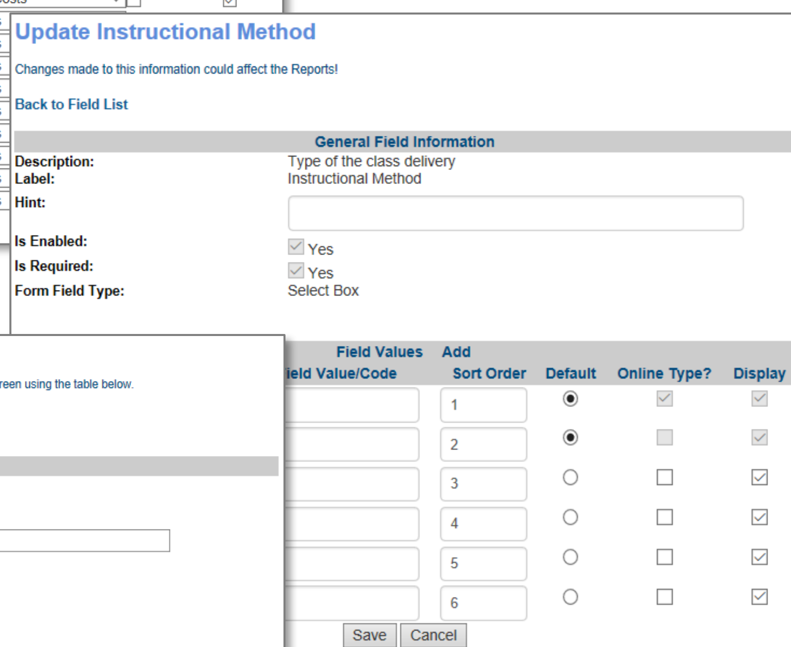


Update Cost Field Values

Manage the Cost labels for the Cost Fields that display on the Class, Course Series and Certificate screens using the table below.

Cost Name	Cost Type	Sort Order	Maps to LERN Cost	Editable Label	Display
Organization's Material C	Material	1	Organization?s Material Cost	☐	☑
Facilities	Facilities	2	Other Costs	☐	☑
Marketing Costs	Marketing	3	Marketing Costs	☐	☑
Other	Marketing	4	Other Costs	☐	☑
Collateral Pieces	Marketing	5	Marketing Costs	☐	☑
Class Prep	Instructor Cost	1	Other Costs		
Curr. Dev.	Instructor Cost	2	Other Costs		
FICA	Instructor Cost	3	Other Costs		
Other	Instructor Cost	4	Other Costs		
Per Diem	Instructor Cost	5	Other Costs		
Teaching	Instructor Cost	6	Other Costs		
Travel	Instructor Cost	7	Other Costs		
Overhead	Overhead	1	Other Costs		
Catering	Facilities	3	Other Costs		

Submit Cancel



Update Instructional Method

Changes made to this information could affect the Reports!

Back to Field List

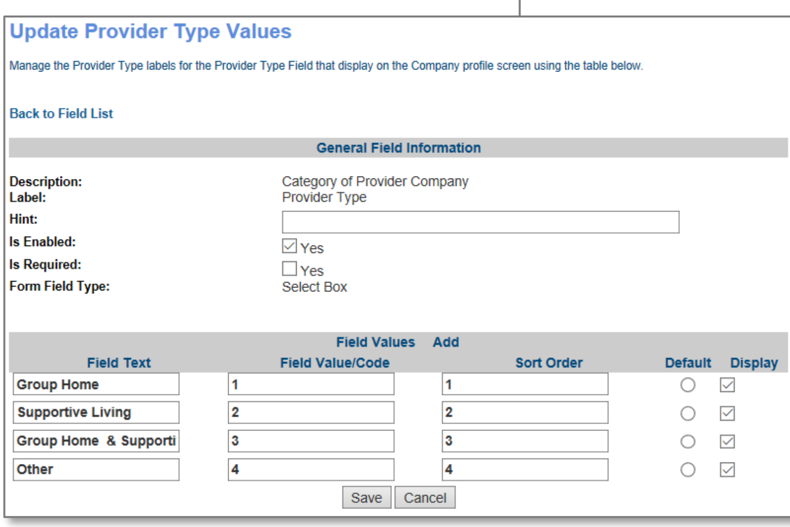
General Field Information

Description: Type of the class delivery
Label: Instructional Method
Hint:
Is Enabled: ☑ Yes
Is Required: ☑ Yes
Form Field Type: Select Box

ield Value/Code	Sort Order	Default	Online Type?	Display
	1	◉	☑	☑
	2	◉	☐	☑
	3	○	☐	☑
	4	○	☐	☑
	5	○	☐	☑
	6	○	☐	☑

Save Cancel

Cost Fields and Instructional Method displays in class set up.



Update Provider Type Values

Manage the Provider Type labels for the Provider Type Field that display on the Company profile screen using the table below.

Back to Field List

General Field Information

Description: Category of Provider Company
Label: Provider Type
Hint:
Is Enabled: ☑ Yes
Is Required: ☐ Yes
Form Field Type: Select Box

Field Text	Field Value/Code	Sort Order	Default	Display
Group Home	1	1	○	☑
Supportive Living	2	2	○	☑
Group Home & Supporti	3	3	○	☑
Other	4	4	○	☑

Save Cancel

Provider Type displays in company profile.

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.

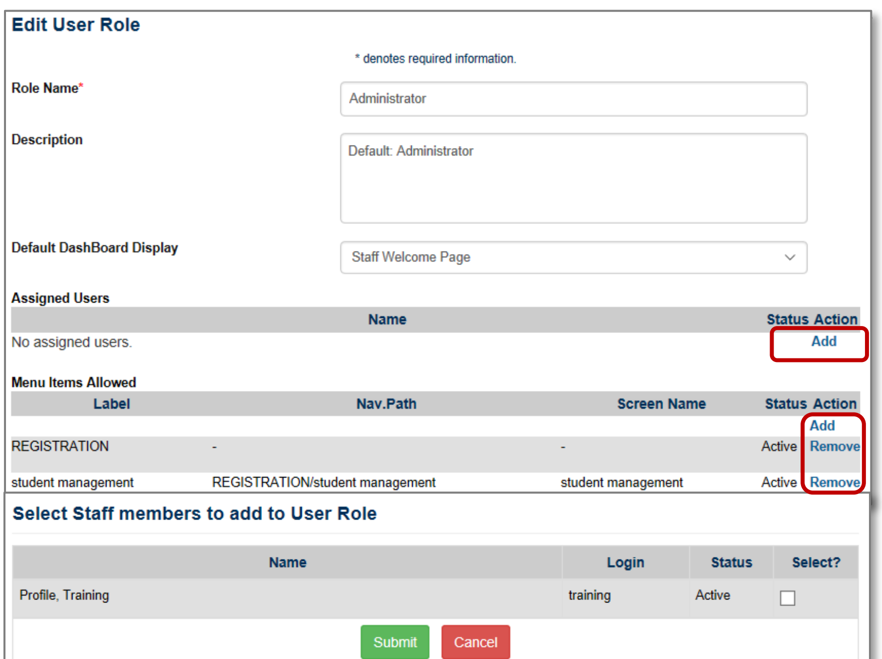
Options available:

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).



- 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.

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.

Intermediate System Options

User Roles – Continued

iPRO PRO CLTV STND

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.

Add Selected Menu Items to User Role

Label	Nav.Path	Screen Name	Select
Send me a Catalog	-	Send me a Catalog	☐
my profile	-	my profile	☑
--- Admin Menu ---	-	--- Admin Menu ---	☐
Shipping Costs: Summary	/Shipping Costs: Summary	Shipping Costs: Summary	☐
my favorites	REPORTS/my favorites	my favorites	☐

Submit Cancel

Access Selection

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

Screen/Function Name	Nav. Path	Action/Link	Access Options
Save Quality Score	COURSE MGMT/courses/classes	Save Quality Score	○Hide ◉Display
Add Course	COURSE MGMT/courses/classes	Add Course	○Hide ◉Display
Clone Course	COURSE MGMT/courses/classes	Clone	○Hide ◉Display
Course Discounts	COURSE MGMT/courses/classes	Discounts	○Hide ○View Access Only ◉Edit Access

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

User Role	
	(Super User)
	Registrar
	Student Manager
	Course Manager
	Locations Manager
	Instructor Manager
	Business 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.

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

<u>Question:</u>
Do you anticipate a need for User Roles? If so, list some possible roles below:

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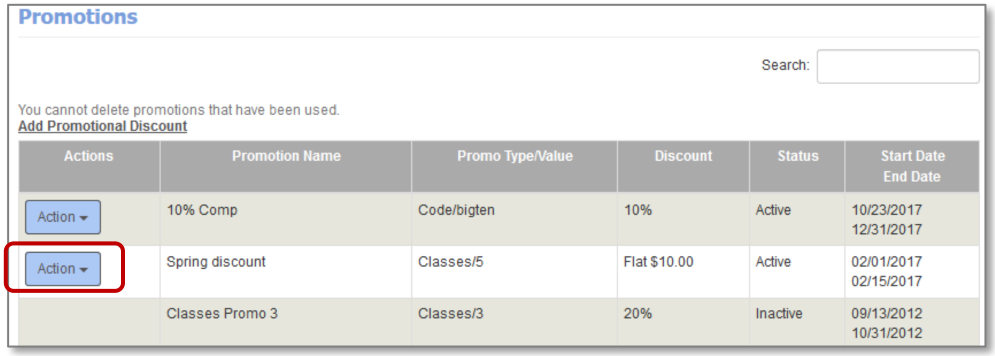
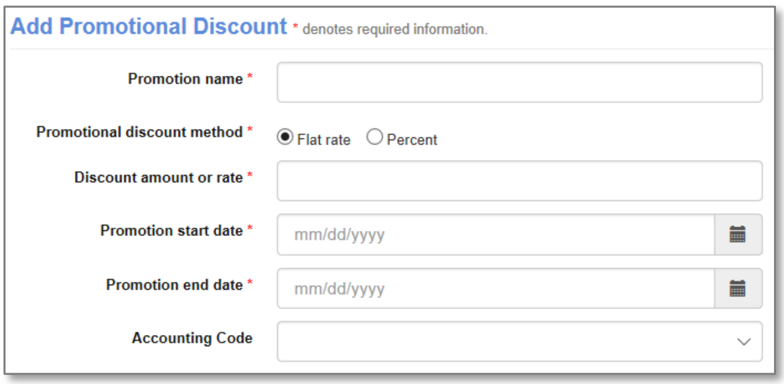
System Options > ***Promotions***

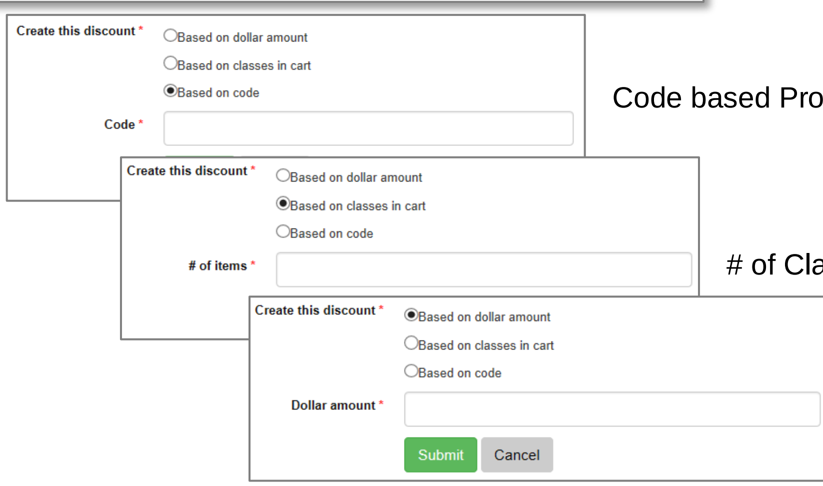


Actions	Promotion Name	Promo Type/Value	Discount	Status	Start Date End Date
Action	10% Comp	Code/bigten	10%	Active	10/23/2017 12/31/2017
Action	Spring discount	Classes/5	Flat $10.00	Active	02/01/2017 02/15/2017
	Classes Promo 3	Classes/3	20%	Inactive	09/13/2012 10/31/2012

The actions available to the Promotions are *Edit* or *Inactivate*.

Setting the promotion to inactivate, allows you to disable the promotion before it has run.





Code based Promotion

# of Class Promotions

Dollar amount Promotion

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.

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.

Intermediate Course Management

Discounts

Objectives for Intermediate Course Management:

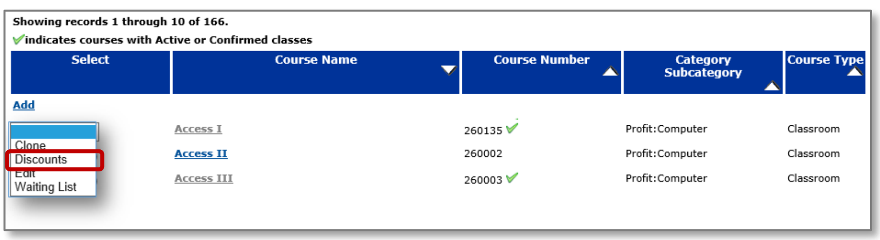
- Add discounts to a course and class
- Create an Online Course
- Add a lesson release statement in Lumens

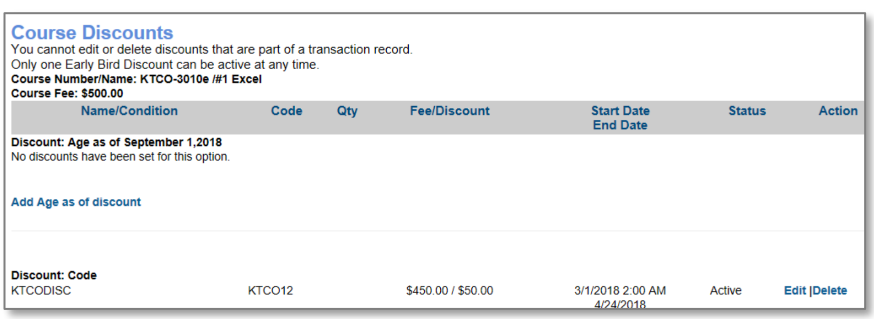
This section of the workbook will focus on using some of the additional functionality for courses and classes. We will discuss creating discounts at the course level, creating an online course and development of lesson release times.

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.





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.

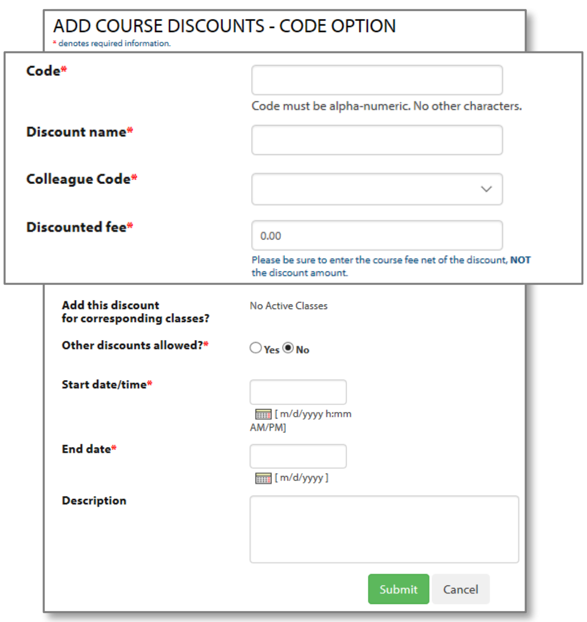
<u>Ripple Effect:</u>
Staff creates discounts at the Course level, and the discount is immediately available to new classes on a go-forward basis. Staff also have the option to apply the discount to any existing active classes.

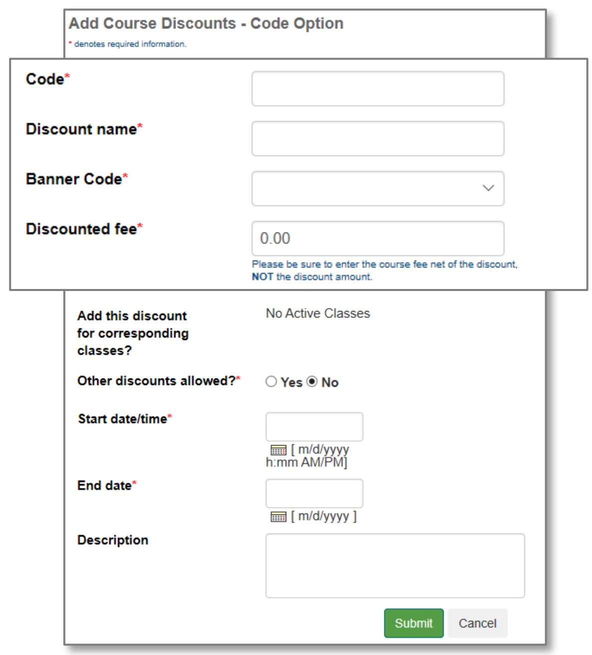
Lumens iPRO Customer Information

- 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.

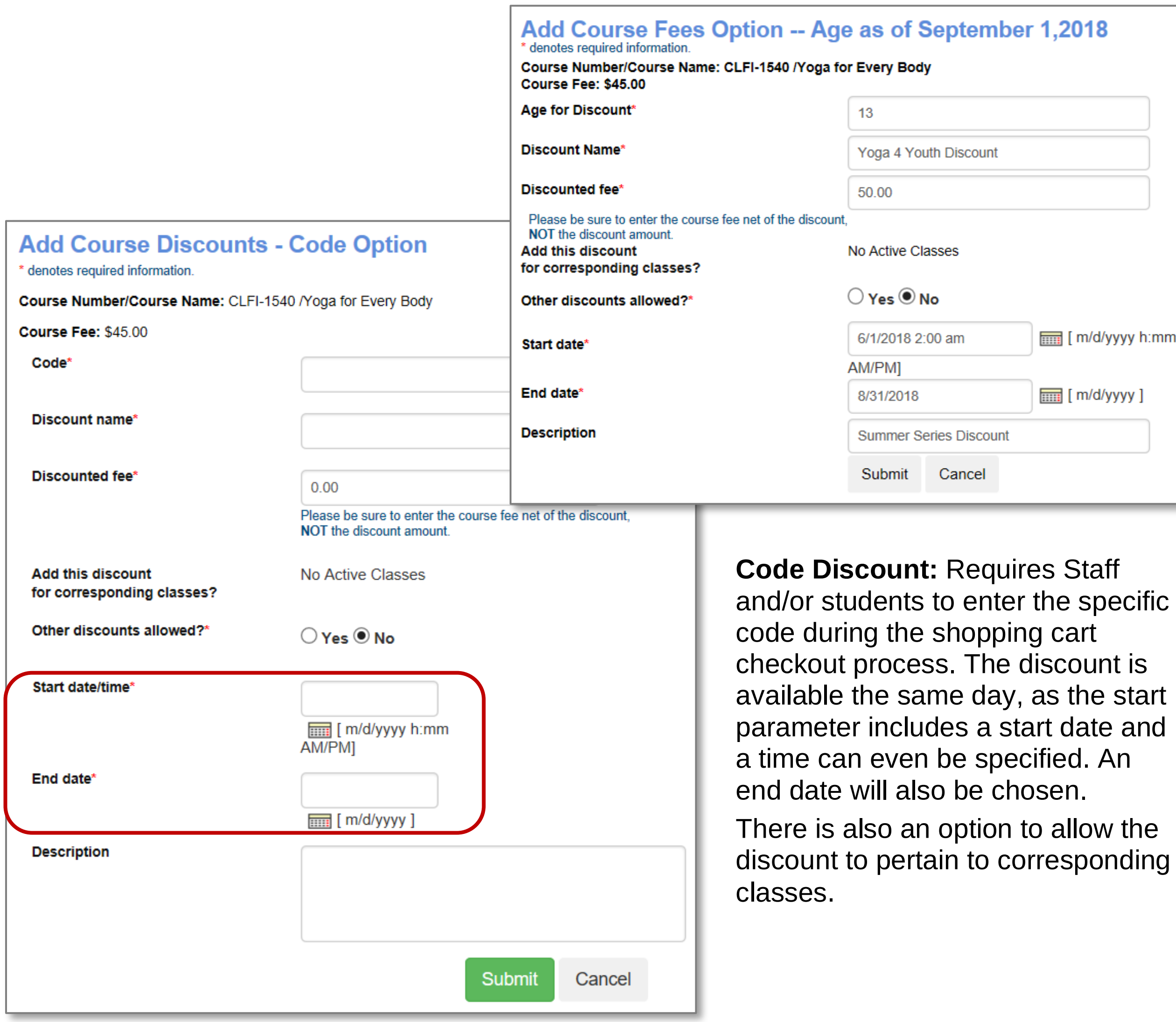
PeopleSoft customers will not be required to add or select an accounting code.





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.

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



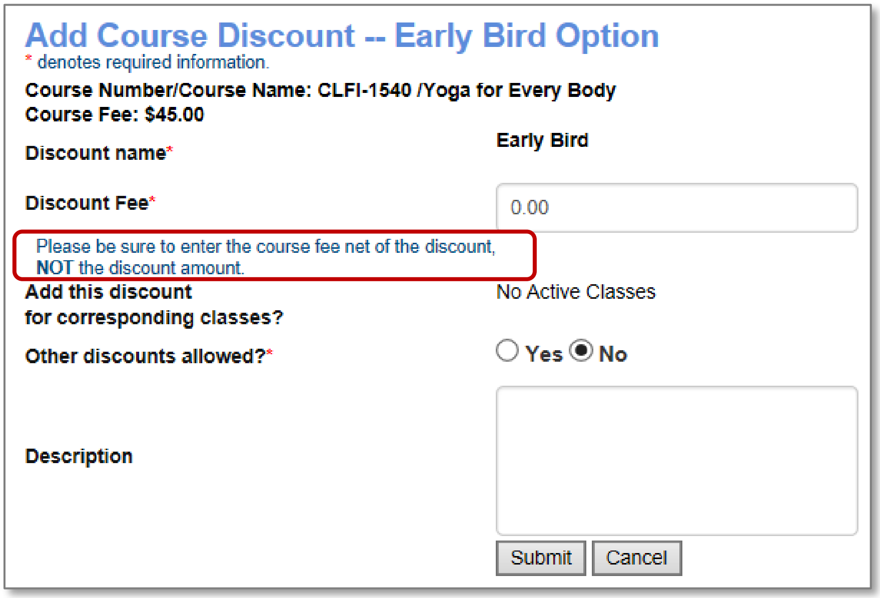
Code Discount: Requires Staff and/or students to enter the specific code during the shopping cart checkout process. The discount is available the same day, as the start parameter includes a start date and a time can even be specified. An end date will also be chosen.

There is also an option to allow the discount to pertain to corresponding classes.

<u>Question:</u>

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

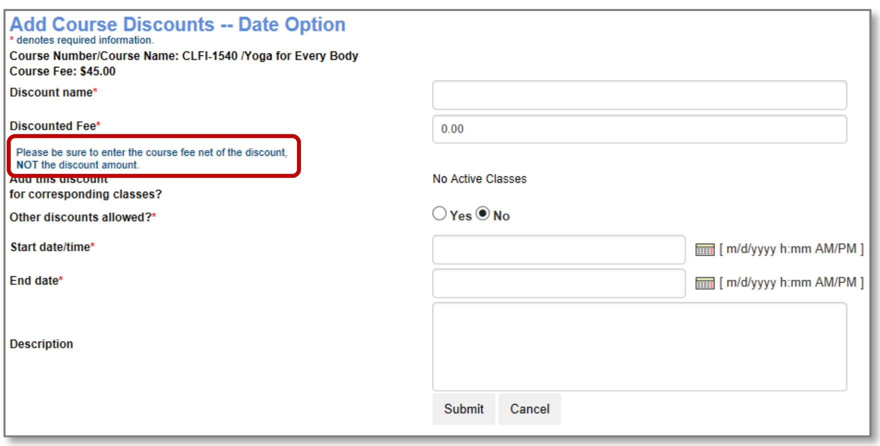
Early Bird Discount: Automatically applies to anyone registering for a class prior to the *Early Bird* discount date.


Add Course Discount -- Early Bird Option
* denotes required information.
Course Number/Course Name: CLFI-1540 /Yoga for Every Body
Course Fee: $45.00
Discount name* Early Bird
Discount Fee* 0.00
Please be sure to enter the course fee net of the discount, NOT the discount amount.
Add this discount for corresponding classes? No Active Classes
Other discounts allowed?* Yes No
Description
Submit Cancel

Managing this discount requires Staff to enter an early bird end date for each term (in the instructional calendar).

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* 0.00
Please be sure to enter the course fee net of the discount, NOT the discount amount.
Add 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.

<u>Question:</u>
Would your organization use either of these discounts? If so, for what purpose?

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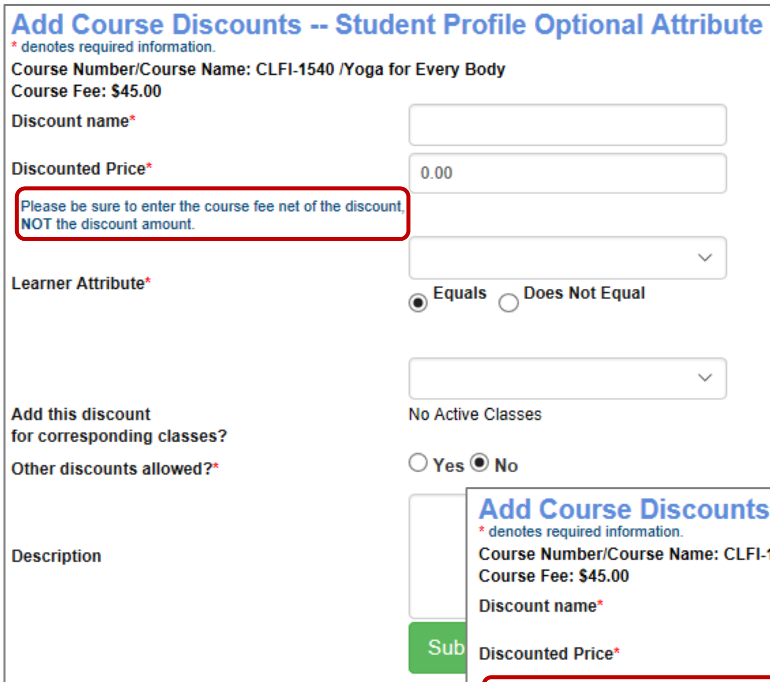
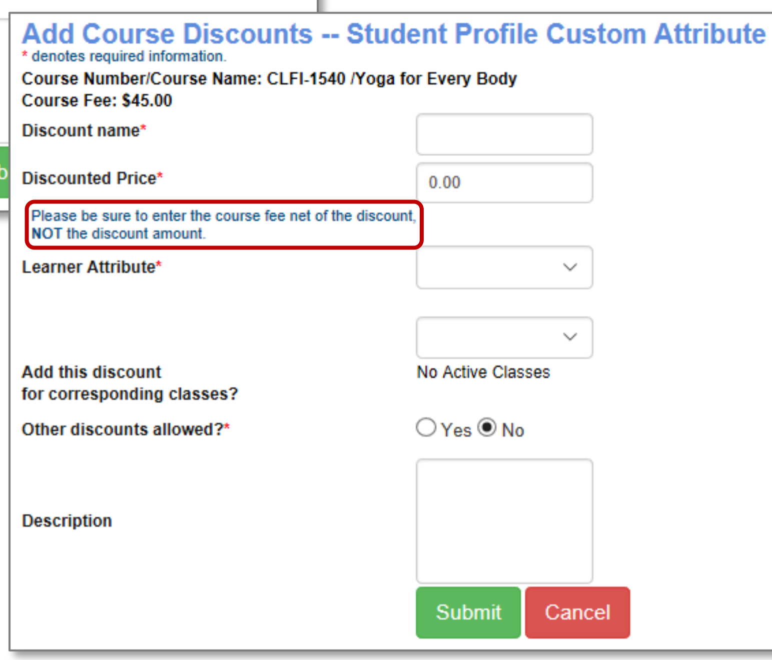
Student Profile Attribute Discounts (Optional or Custom):



This discount is based on any *Optional Field* activated on the Learner profile.

Create this discount by selecting any enabled optional field set up as a radio button or select drop down list.



A similar discount is available for *Custom Fields.*

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?

____

____

Try It!:

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
- No 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
- Allow 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
- Allow 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
- No other discounts

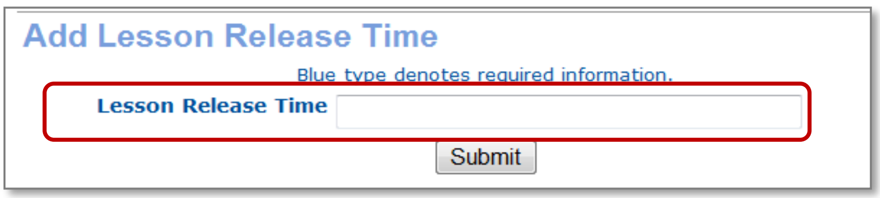
If more team members need an activity each participant can create a new code and/or date and use an activity above.

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

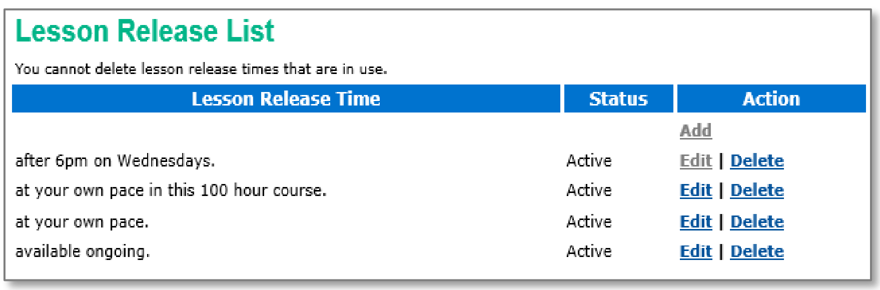
Course Management > ***Lesson Release Times***

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

- To create a new release time, click *Add*



- Enter the time you want to release the online lesson.

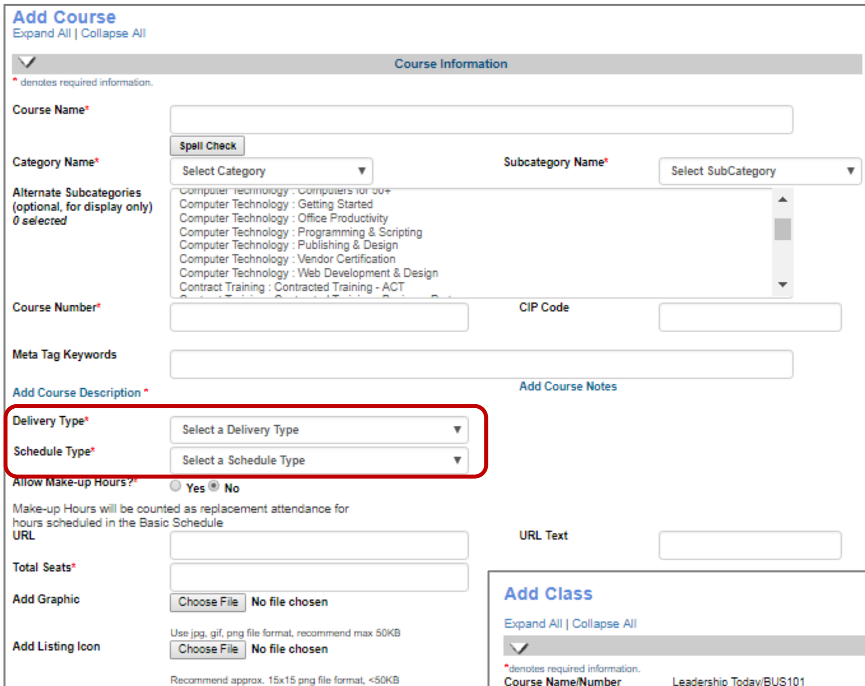


- When you add lesson release times, a select drop down list becomes available for Staff to select from when creating in-house online classes.

<u>Ripple Effect</u>:
Lesson Release Times are available for both Open-Ended and Scheduled Online classes.

<u>Retention Activity</u>:
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***

Course Mgmt > ***Courses / Classes***

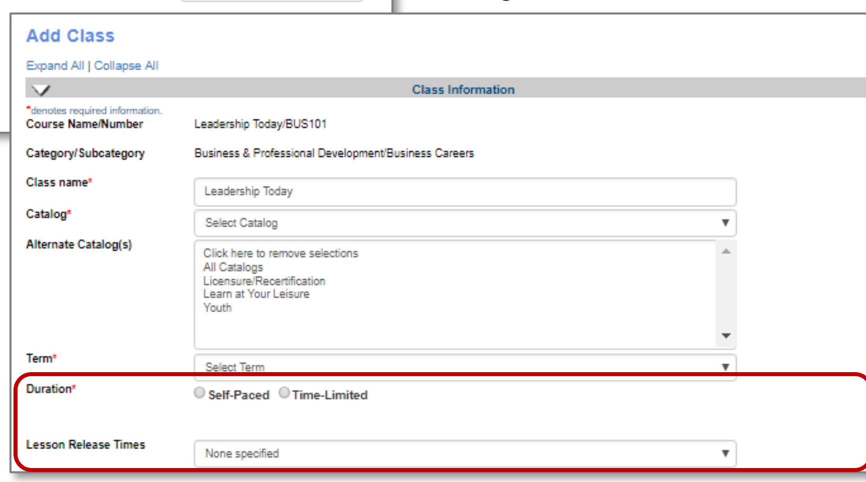


Click Add

Delivery Type:
Online or Hybrid.

Schedule Type:
Scheduled, Open Ended (Instructor-led or online)

Entering a URL is required when creating an Online or Hybrid course. It will display as a hyperlink in the class listing.



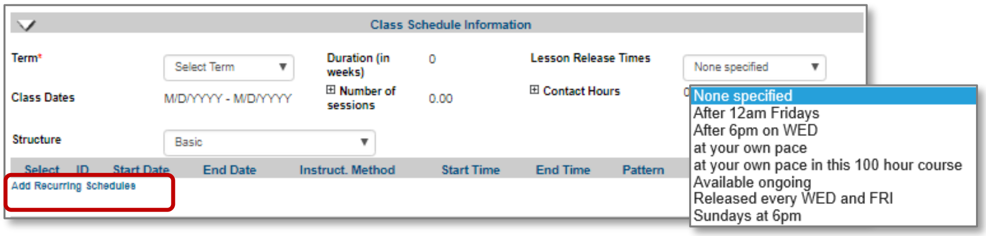
Open-Ended: <u>Online</u> class creation for open-ended schedule type.

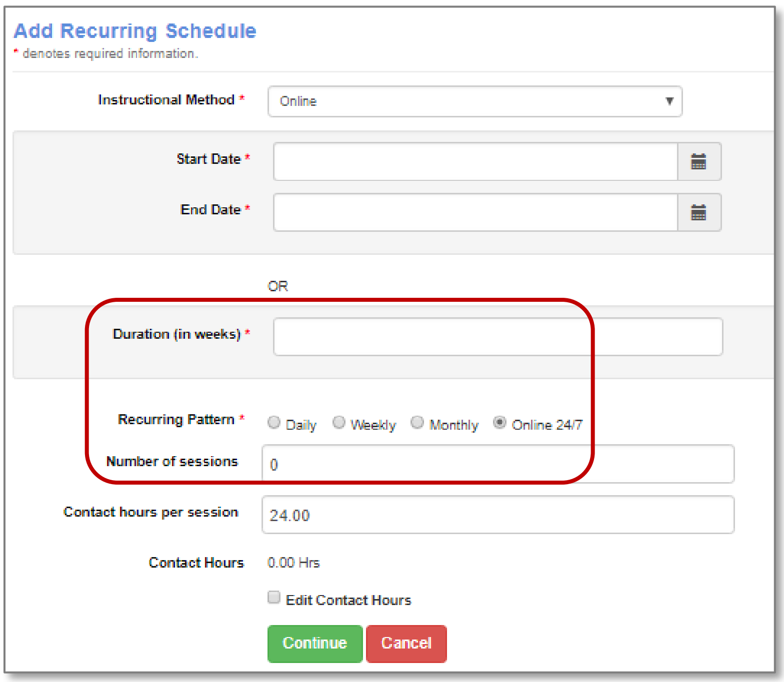
- Select, Self-Paced and then complete class creation.
- Lesson Release Times are an option.
- Select, *Time Limited* and enter quantity of days, weeks, or months.

<u>Ripple Effect</u>:
For open-ended classes, both self-paced and time limited, class begins upon Student registration.

<u>Additional Reference:</u>
QRA available in Customer Support > Document Center > Quick Reference Library > ***Online Open-Ended Classes***

Scheduled: Online class creation for a Scheduled course type.



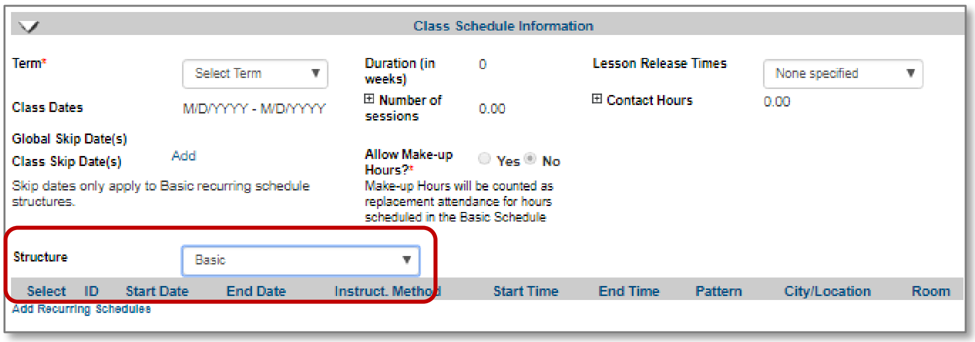


- Assign *Term*
- Select Lesson Release Times (if used) and / or click, *Add Recurring Schedule*.

- 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.

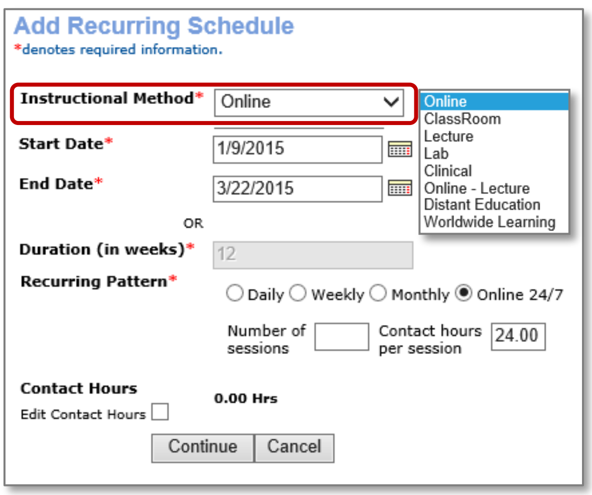
Scheduled: For courses with Delivery type as Hybrid and Schedule Type as Scheduled.

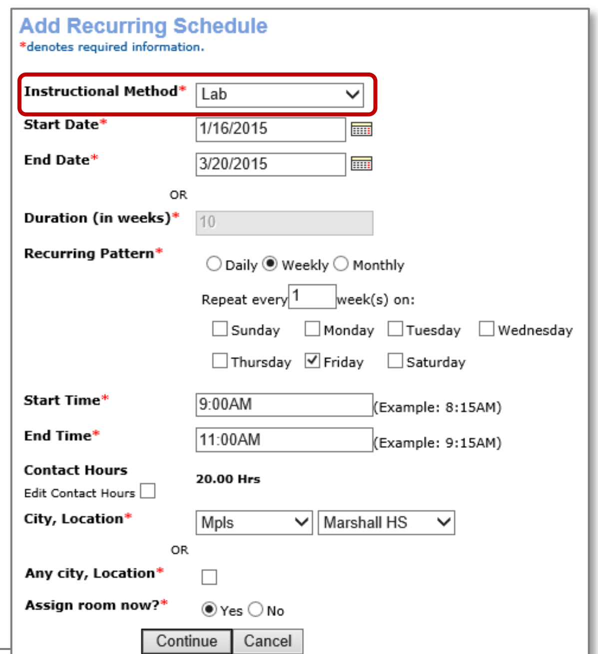
- Hybrid used when in person and online components needed for same class
- Option: Lesson Release Times (if used)
- Select *Basic, Flexible* or *Combination* structure

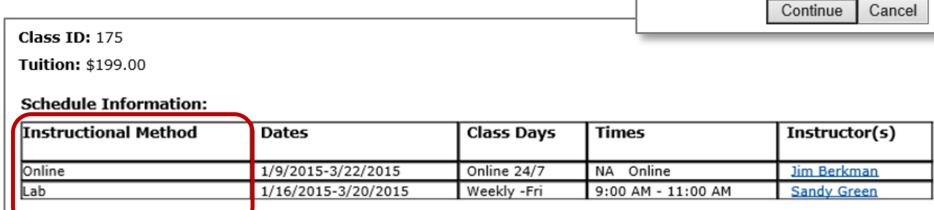


Basic Structure:

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

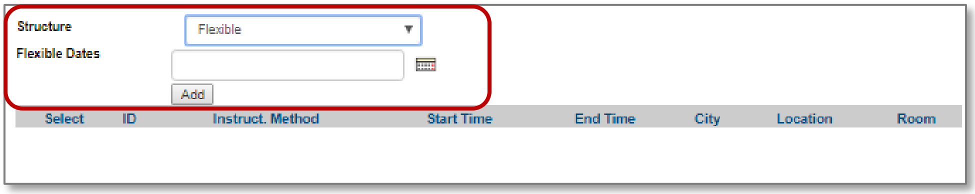




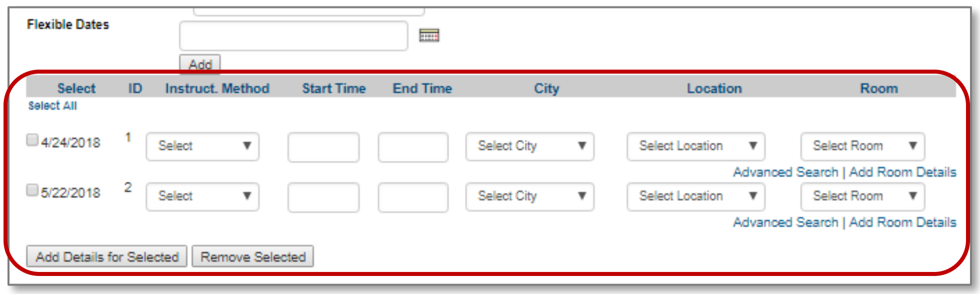


Guest view - class details page

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



Add dates, choose calendar, click on applicable dates, then click “done.”

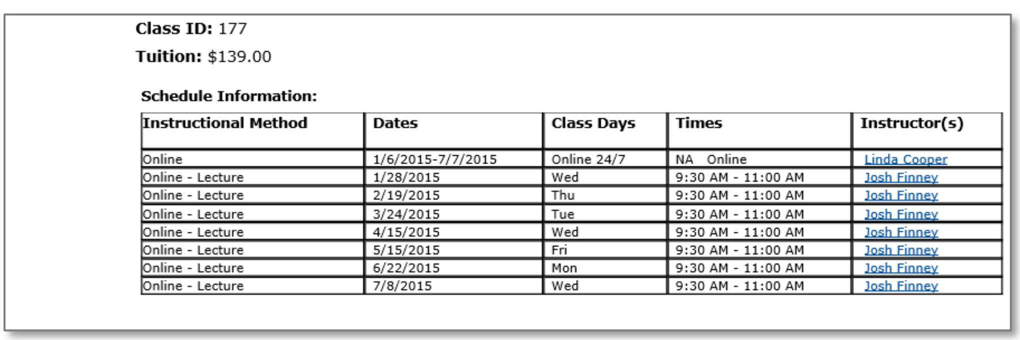


Add details for selected dates

- 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

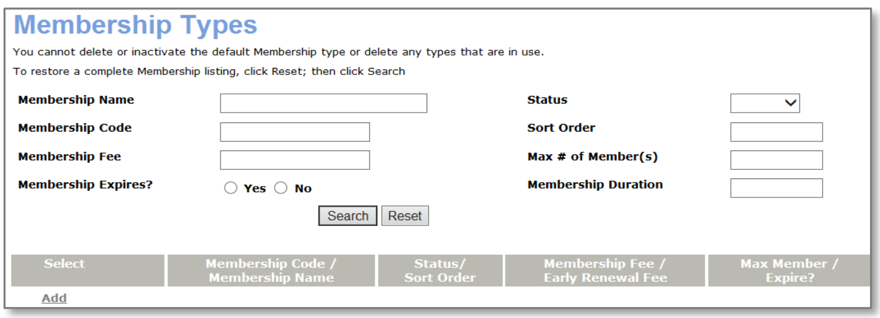
Members

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?

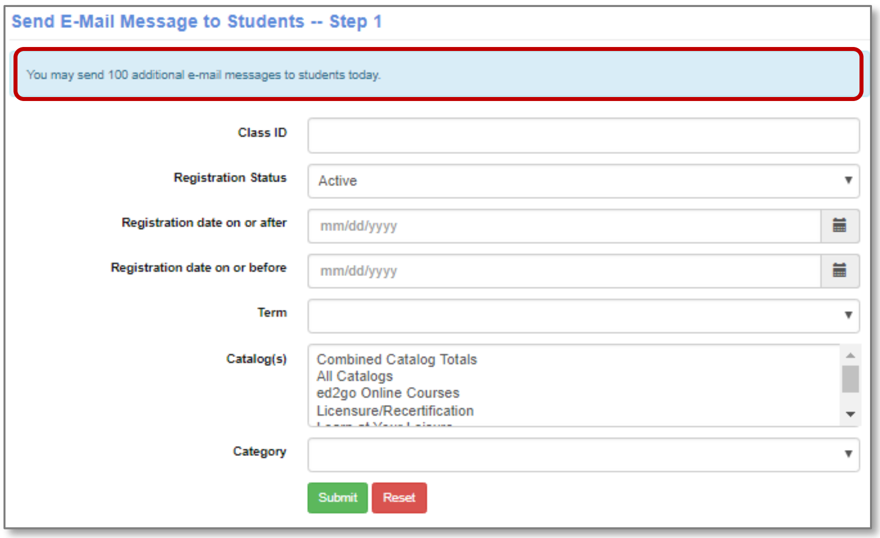
____

Lumens iPRO Customer Information

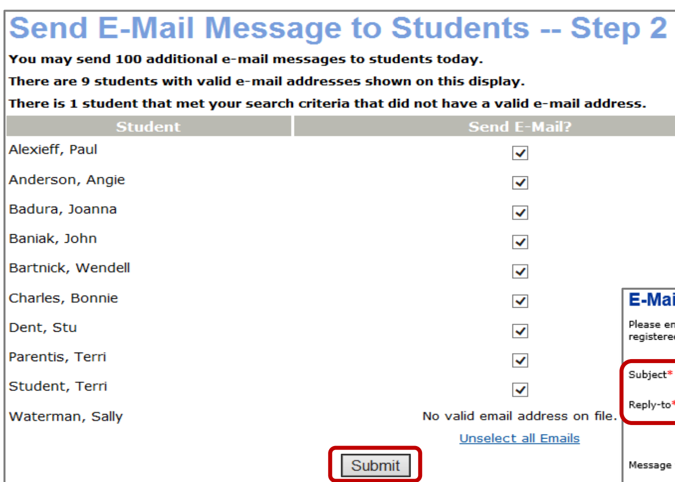
Memberships are available IF the membership has a $0 cost.

Students > ***Email to Students***

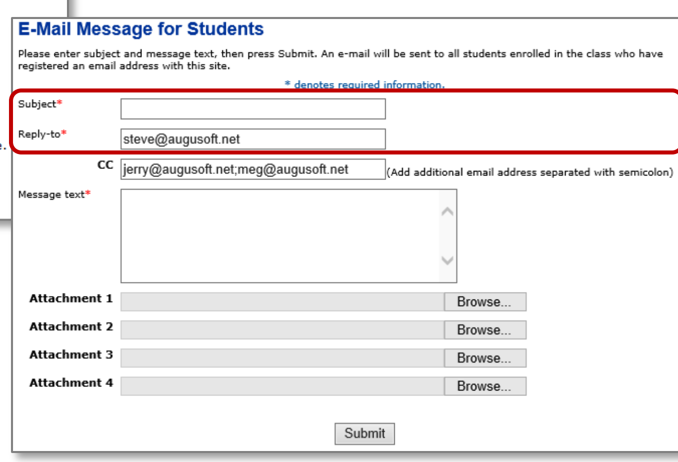
Staff can send an additional 100 emails daily from Lumens, this is in addition to the automatic messages sent from Lumens triggers by an action (Registration Confirmation, Password Reset, etc.).



- 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 drop-down list.
- Click *Submit*



- Lumens indicates when a Student does not have an email address.
- Select the Student(s) to receive the email and click *Submit*.

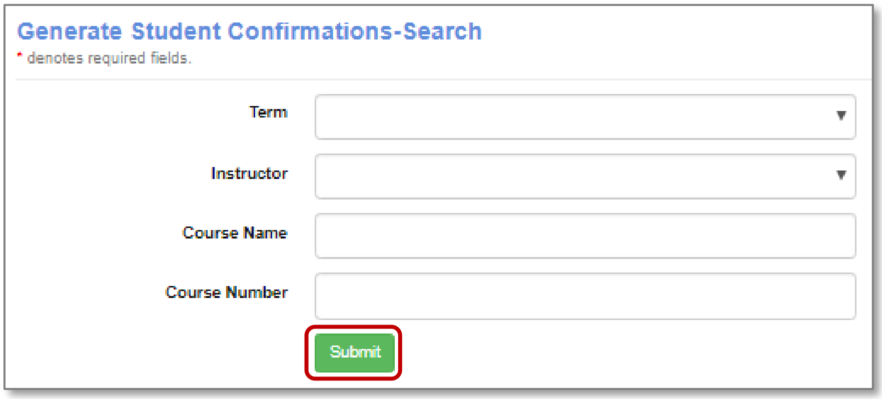


System Options > ***System Preferences***
Mailbox 4: Reply to
Mailbox 3 and 5: Carbon Copy (CC:)

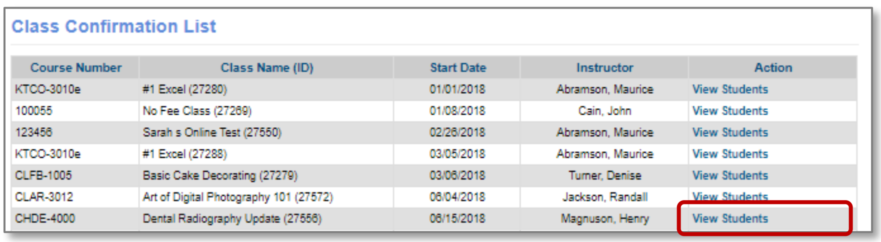
Staff may affix up to four attachments

Click *Submit* to generate email.

Students > ***Student Confirms***



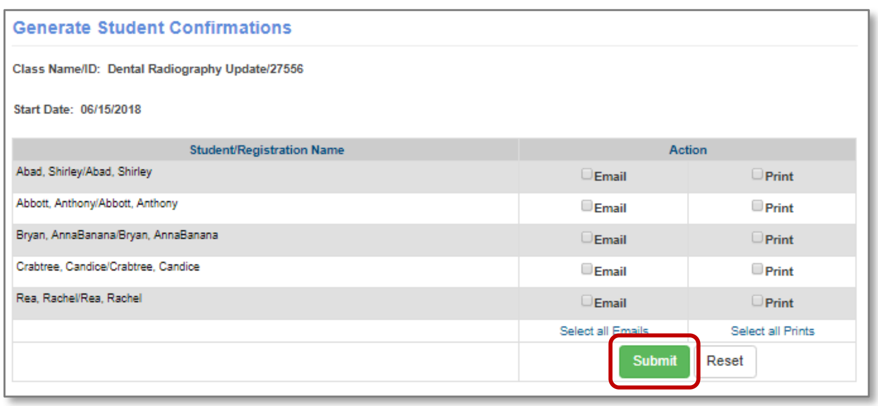
- Staff may send Learner confirmations on a per class basis.
- Enter search criteria and click *Submit.*



Class Confirmation List

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 (27269)	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	Action	
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	Select all Prints
	Submit	Reset

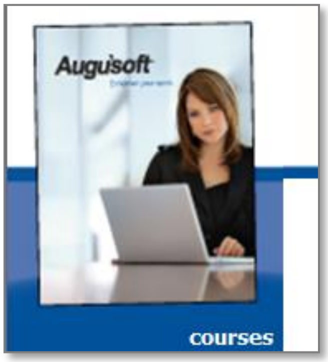
- The *Print* option displays a printable confirmation notice.
- If no email address available, the checkbox is grayed out and non-functional.
- Upon Submit, this view displays with the Reply To: prepopulated.

<u>Ripple Effect:</u>
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

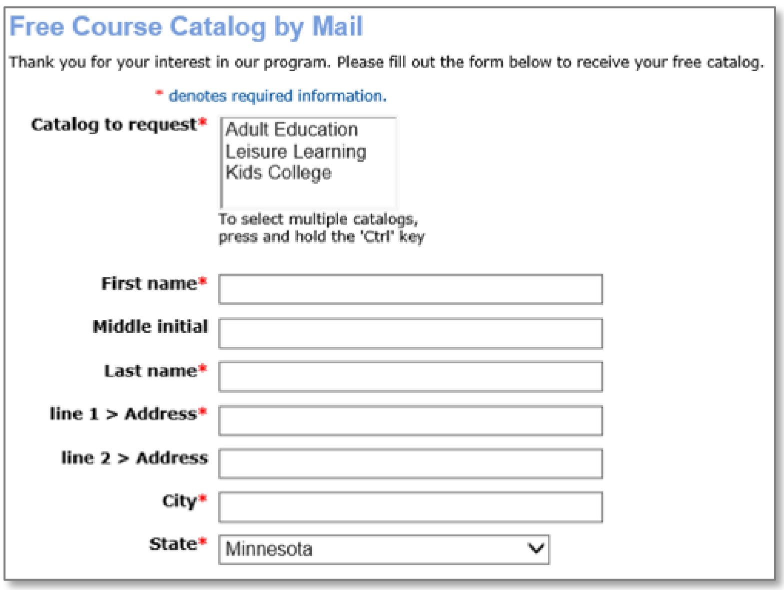
Catalog Requests

iPRO PRO CLTV STND



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.

* denotes required information.

Catalog to request*: Adult Education / Leisure Learning / Kids College

To select multiple catalogs, press and hold the 'Ctrl' key

First name*

Middle initial

Last name*

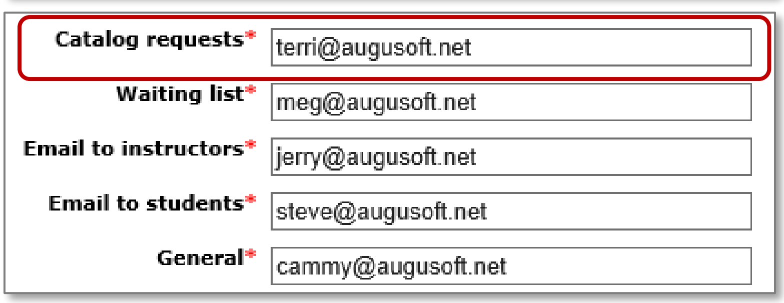
line 1 > Address*

line 2 > Address

City*

State*: Minnesota

- 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.



Catalog requests*	terri@augusoft.net
Waiting list*	meg@augusoft.net
Email to instructors*	jerry@augusoft.net
Email to students*	steve@augusoft.net
General*	cammy@augusoft.net

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

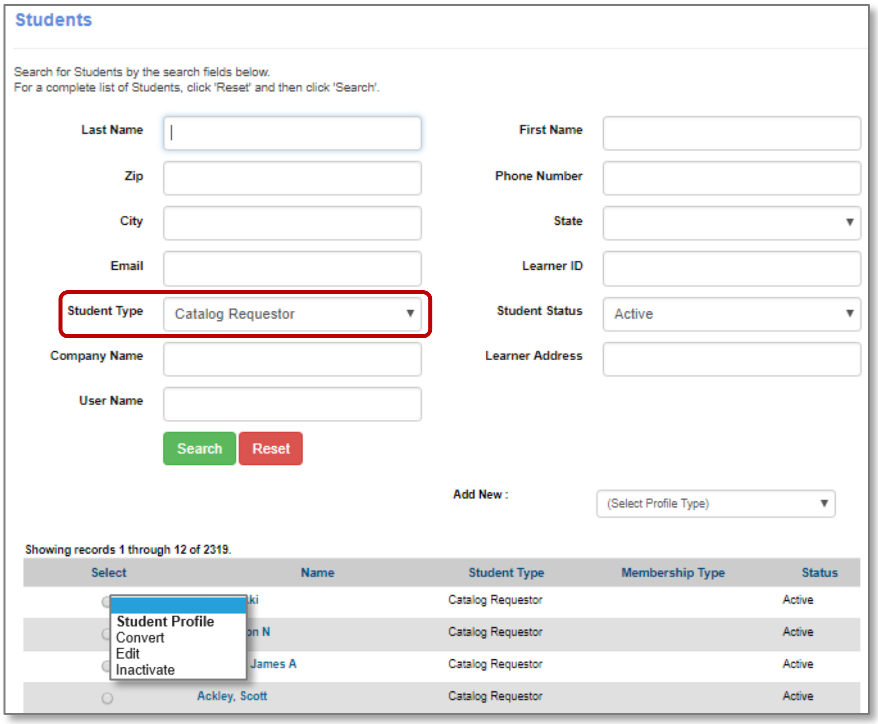
<u>Ripple Effect:</u>
The mailboxes initially set up when building your site are important. In this case, be sure the Catalog Requests mailbox is monitored regularly so the catalog can be sent in a timely manner. Think about who this should be in your organization.

Intermediate Students

Catalog Requests - Continued

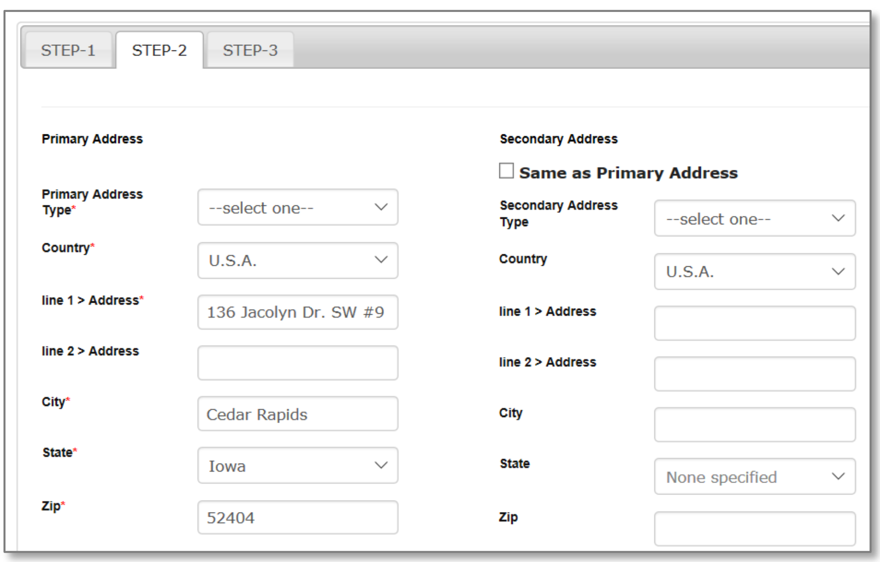
iPRO PRO CLTV STND

Students > Student Management > Student type - ***Catalog Requestor***



To manage the information submitted by Catalog Requestors, Staff must search for Catalog Requestors.

- Staff can Edit, Convert, or Inactivate the profile.



- This 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.

Intermediate Registration

Registrations – Late, Transfers, and Cancels

iPRO PRO CLTV STND

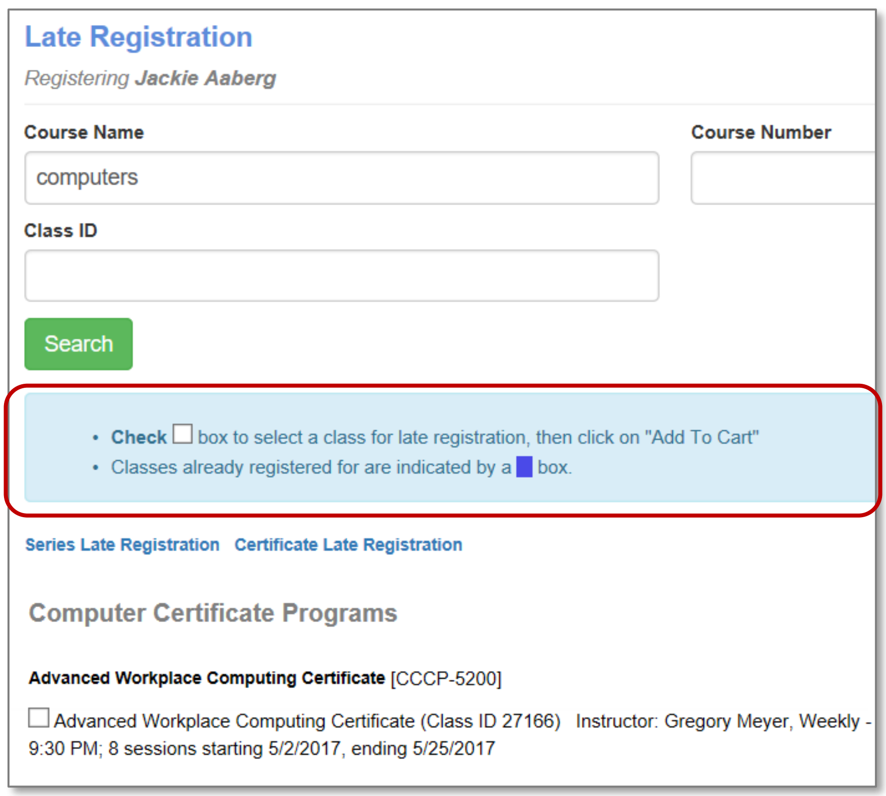
Objectives for Intermediate Registration:

- 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.

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



Your organization may still choose to register Students into the class even after it has moved to a 'run' status. When this occurs, the *Late Registration* feature is used.

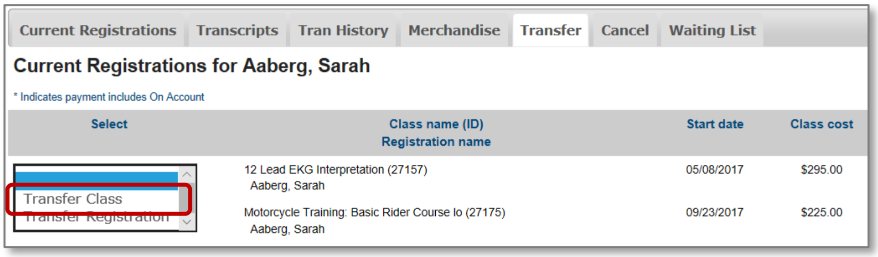
When Staff selects Late Registration, classes display in the *Run* status based on your Late Registration settings.

Search the course name or number or scroll through the list. Once the class is located and selected, click *Add to Cart*. Process as any registration.

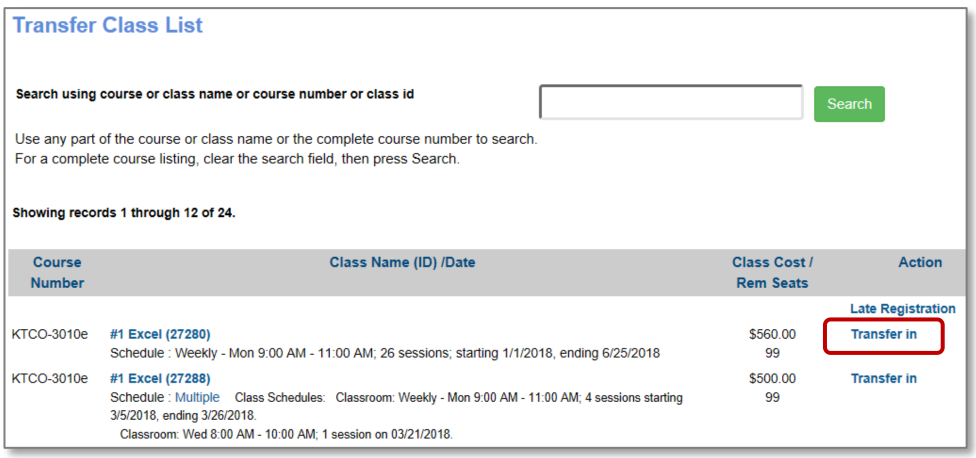
<u>Ripple Effect:</u>

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.



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



- 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.

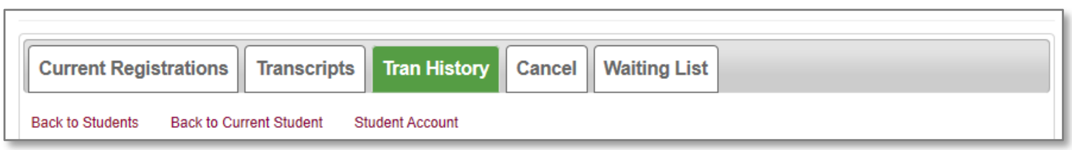
<u>Ripple Effect:</u>
Both transfers and cancels are based on the number of days set in *System Options* > *Power User* > ***Class Set-up Settings*** for these types of transactions. Typically, organizations set up transfers and cancels to occur within 60 - 90 days after the class end date.

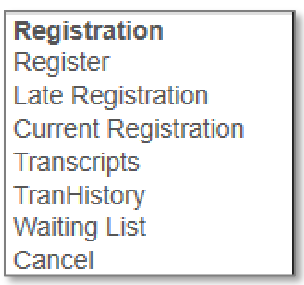
Lumens iPRO Customer Information

- 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.





Transfer Registration Transaction Review

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

Student ID : Student Name	55127 : Sarah Aaberg
Registration Name	Aaberg, Sarah
Registration ID : Date	85543 : 04/27/2017
Transaction ID : Date	69763 : 04/27/2017
Memo	[None]
Transaction Balance (Original payments minus previous refunds)	$295.00 - $0.00 = $295.00
Payment method(s)	Check : $295.00
Payments made	
Number of registrations in original transaction	
Registration fee	

Review class transfer details for accuracy before processing the transfer.

	Transferring from	Transferring to
Class ID	27157	27280
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)	$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 = $0.00	$10.00
Prepaid book fee (Fee minus discounts)	$0.00 - $0.00 - $0.00 = $0.00	$10.00
Prepaid program fee (Fee minus discounts)	$0.00 - $0.00 - $0.00 = $0.00	$40.00
Charge $20.00 service fee? *	◉Yes ◯No	
Code Discount		

Continue Cancel

Choose whether to charge the service fee or not. Additionally, other fees may or may not be refunded. If a payment or refund is due based on the transfer, an additional screen for payment or refund will display. The view is very similar to the shopping cart.

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.

Transfer Registration Transaction Review - Step 2

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

Student ID : Student Name	55127 : Sarah Aaberg
Registration Name	Aaberg, Sarah
Registration ID : Date	85543 : 04/27/2017
Transaction ID : Date	69763 : 04/27/2017
Transaction Balance (Original payments minus previous refunds)	$295.00 - $0.00 = $295.00
Payment method(s)	Check : $295.00
Payments made	
Number of registrations in original transaction	1
Registration fee	

	Transferring from	Transferring to
Class ID	27157	27280
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))	$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
Total Merchandise Item Discounts	$0.00	$0.00

Transfer service fee	
Payments Made for Merchandise Items	Sarah Aaberg : $0.00
Payment Made (Does not include Registration Fees)	Sarah Aaberg : $295.00
Suggested Payment Amount:	**$285.00**

Payment Options : Sarah Aaberg: Suggested Amount = $285.00

You may process a payment amount of zero if you choose not to require payment or to issue a refund.

Sarah Aaberg Suggested payment amount: 285

Suggested action:

If you need to change the payment amount, please process an UNDERPAYMENT or OVERPAYMENT from the next page

(•) Payment ( ) Refund ( ) Zero amount

Continue Cancel

Review the *Transfer To* and *Transfer From* fields for accuracy.

Confirm the amount of refund or payment (if any).

If a Service Fee is charged or the class has a higher cost, Lumens will request an additional payment, and the payment method view will be available on the next screen. If a refund is due, a refund method screen will display.

Staff option to add memo to transfer transaction.

Transfer Registration Transaction Summary

Student ID	856
Student name	Phyllis Adams
Student Address	8513 Ganttcrest Dr. Austin, TX 78749
Registration for	Adams, Phyllis

	Old Registration	New Registration
Registration ID	7030	7032
Registration date	01/07/2012	01/07/2012
Transaction ID	7044	7045
Transaction date	01/07/2012	01/07/2012

	Transferred from	Transferred to
Class ID	9557	9559
Class name	MS Excel for Beginners	MS Excel for Beginners
Start date	01/03/2012	03/06/2012
End date	01/20/2012	03/23/2012

Product	Amount
Payment Amount	$325.00
Refund Amount	($325.00)

Total payment

Add memo text to the transfer-in transaction

Print view

Print student transfer confirmation

Back to transfer/cancel student selection

Frank Albertson
4352 Sampson Dr.

Minneapolis, MN 51235

Student Class Transfer Ticket

Your class transfer request at Augusoft, Inc. has been successfully processed!
You have been officially transferred from Access I to Access Basics I.The following information is everything you need to know in preparation for the class. If you have any questions, please contact us. Confirmation Date: 06/03/2011 Confirmation Number: 1846 Course Number/Name: 260001 Access Basics I Class Date(s):Monday, Tuesday, 9:00 AM - 11:00 AM; 18 sessions starting June 13, 2011, ending July 11, 2011 (No Class on May 30, 2011, May 31, 2011)

Important Info:

Please bring the materials fee (MaterialsCost) to the firstclass. 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

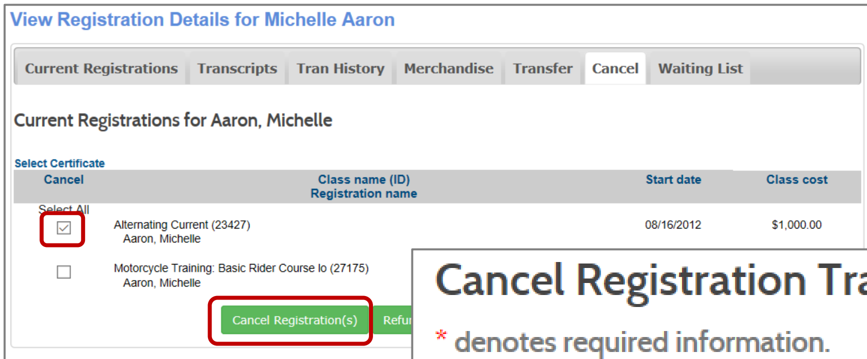
Thank you for registering!

- Transfer confirmation is sent automatically to Student with valid email address in profile.
- Staff can print if desired.
- The transfer email is located in *System Options > Template Management >* ***Learner Transfer Confirmation***

Ripple Effect:

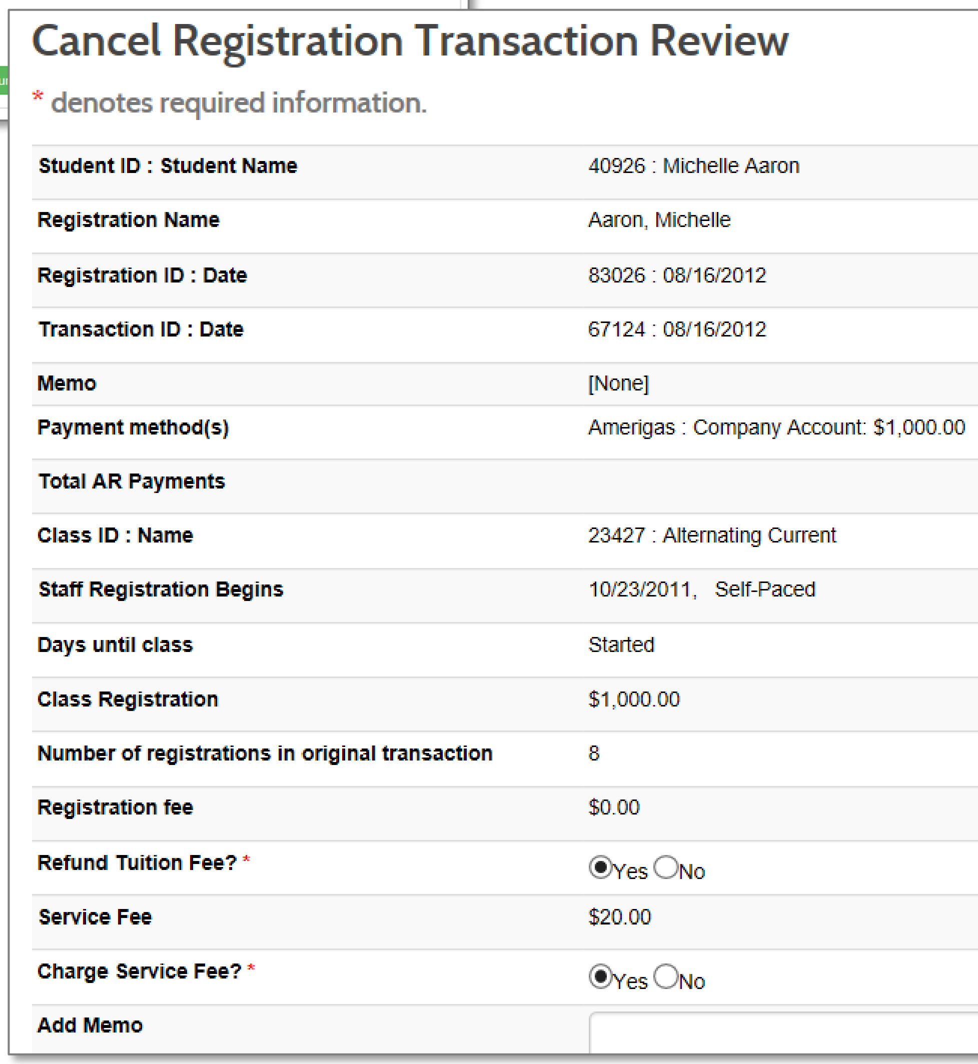
When a transfer occurs, the funds from the original transaction do not follow the transfer. If the transfer is even, Lumens will display a waived fee (because the fee was already paid), if more than the original transaction, a payment screen will become available. If the class is less than the original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

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



Select class to cancel, then click continue.

- Staff can cancel multiple classes or choose to refund the class with no cancellation notification.



Cancel Registration Transaction Review

* denotes required information.

Student ID : Student Name	40926 : Michelle Aaron
Registration Name	Aaron, Michelle
Registration ID : Date	83026 : 08/16/2012
Transaction ID : Date	67124 : 08/16/2012
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	

- The Transaction Review displays the original transaction details.
- Do you want to refund any of these fees?

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.

Cancel Registration Transaction Review - Step 2

* denotes required information.

Student ID : Student Name	40926 : Aaron, Michelle
Registration Name	Aaron, Michelle
Class ID : Name	23427 : Alternating Current
Transaction Balance (Original payments minus previous refunds)	\$2,594.00 - \$0.00 = \$2,594.00
Payment Method(s)	Amerigas : Company Account: \$1,000.00
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
Service fee	\$20.00	20.00
Total Refunds	(\$0.00)	(\$0.00)
Total Credits to AR	(\$980.00)	\$(980.00)

- The transaction balance is the total registration amount.
- The default refund method originates from the refund policy. Staff can edit here.
- The refund amount is editable, but limited by an amount set by Power Users.

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.

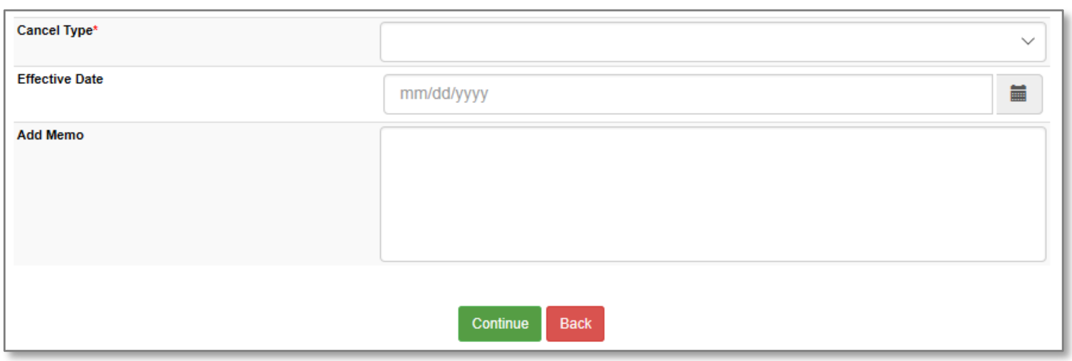
Ripple Effect:

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.***

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.



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*.

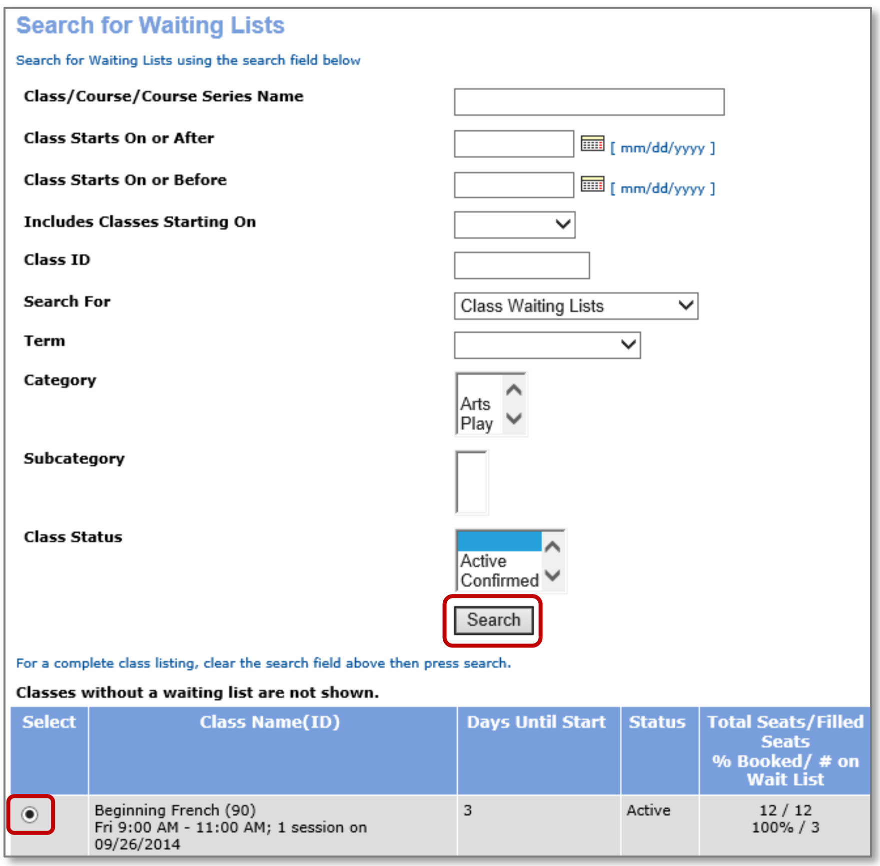
Registrations > ***Waiting Lists***

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
○	Anatomy-Human Body Function (27551) Mon 8:30 AM - 7:00 PM; 1 session on 02/26/2018	-25	Run	1 / 1 100% / 1

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.

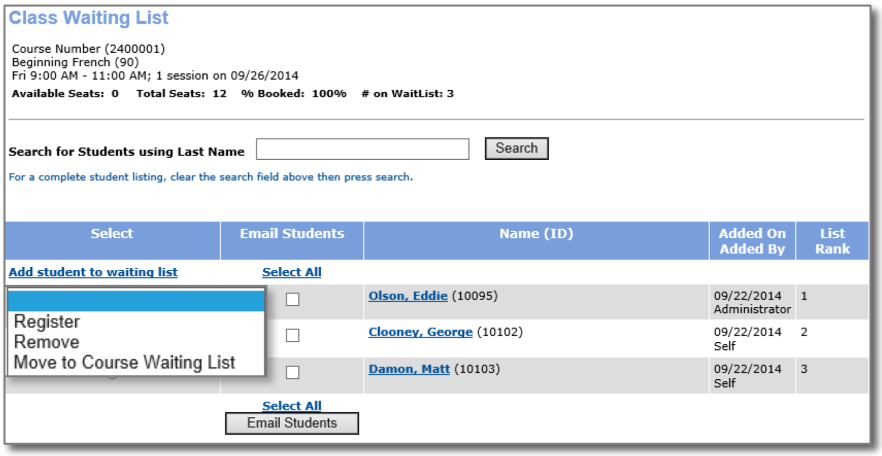
To manage class waiting lists, from the left navigation bar hover over *Registrations* and click *Waiting Lists*.



Staff can find a specific waiting list by using various search filters or click *Search* to retrieve all class waiting lists.

To view the waiting list, click the radio button next to the Class Name.

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

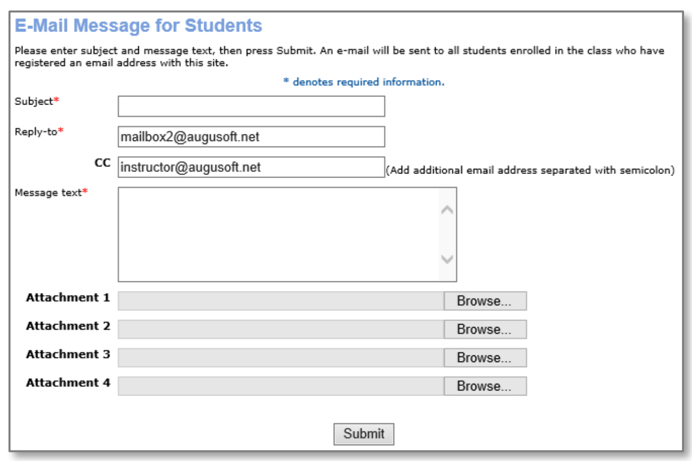


Staff can register a Student if:

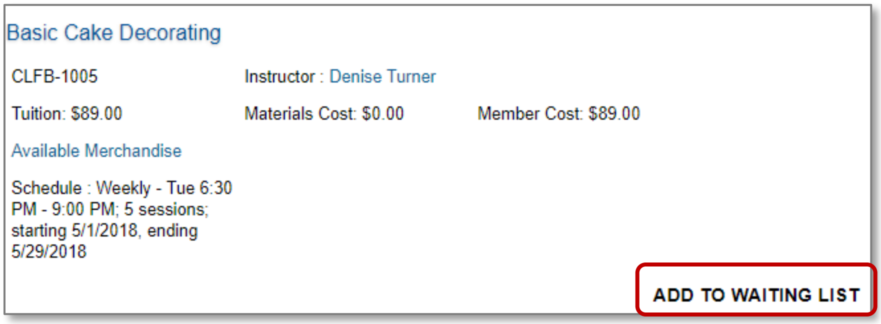
- a seat opens due to a cancellation (mailbox 2 receives an email indicating a cancellation for the class with a wait list)
- if the class size was increased or
- if the organization has decided to over-enroll the class.

Other wait list management abilities Staff have:

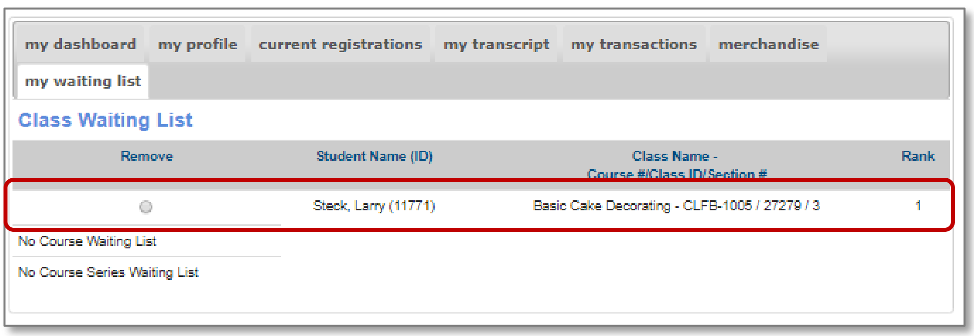
- Remove a Student from the waiting list.
- Move a Student from a Class wait list to a Course wait list in the instance to be considered for the next session.
- Ability to email Students in bulk when space becomes available to notify them they can complete registration on a first-come-first-serve basis.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



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



A Student can sign in and view their waitlist 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.

Objectives for Intermediate Instructors:

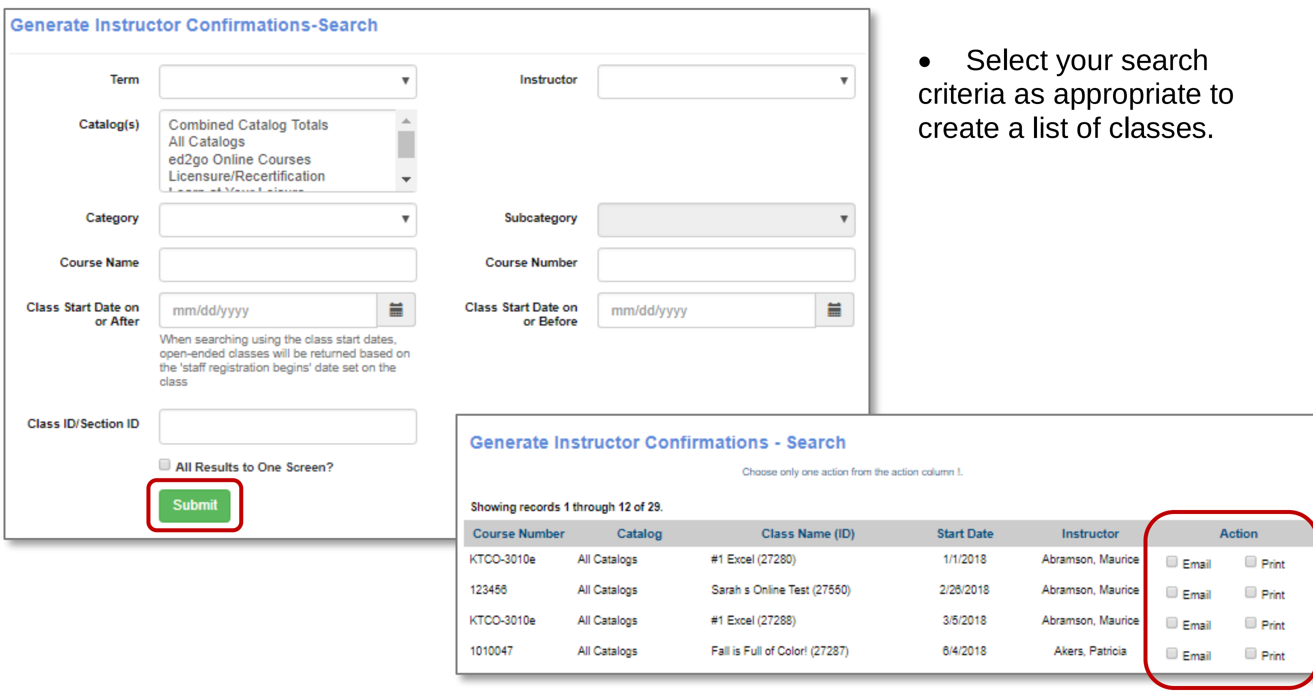
- Review email to Instructors using Lumens
- Process Instructor confirms for classes

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).



- Select your search criteria as appropriate to create a list of classes.

<u>Ripple Effect:</u>

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

<u>Retention Activity:</u>

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

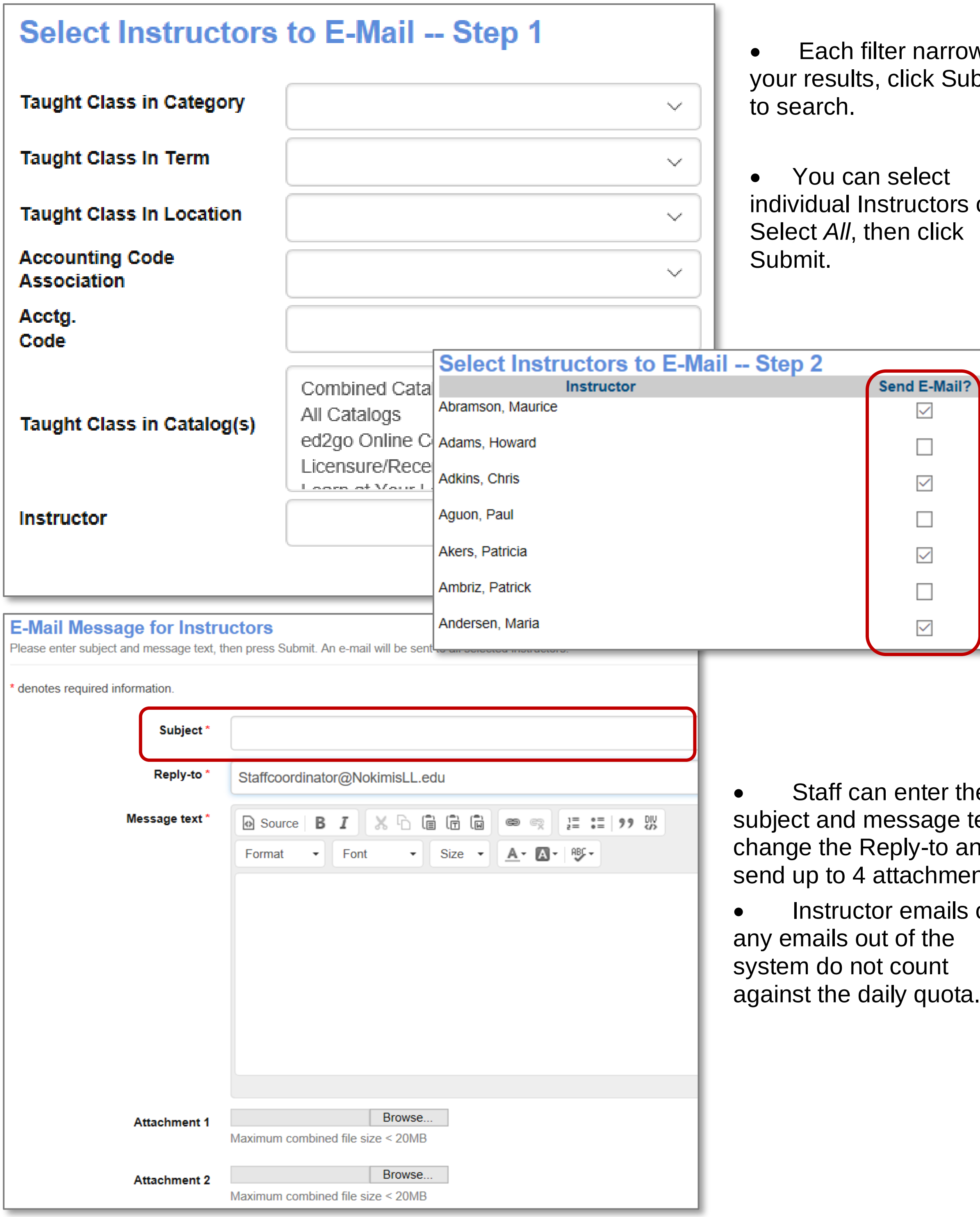
Intermediate Instructors

Email and Confirmations to Instructors - Continued

iPRO PRO CLTV STND

Instructors > ***Email to Instructors***

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



- Each filter narrows your results, click Submit to search.
- You can select individual Instructors or Select *All*, then click Submit.
- Staff can enter the subject and message text, change the Reply-to and send up to 4 attachments.
- Instructor emails or any emails out of the system do not count against the daily quota.

Intermediate Class Information

Go / No Go

iPRO PRO CLTV STND

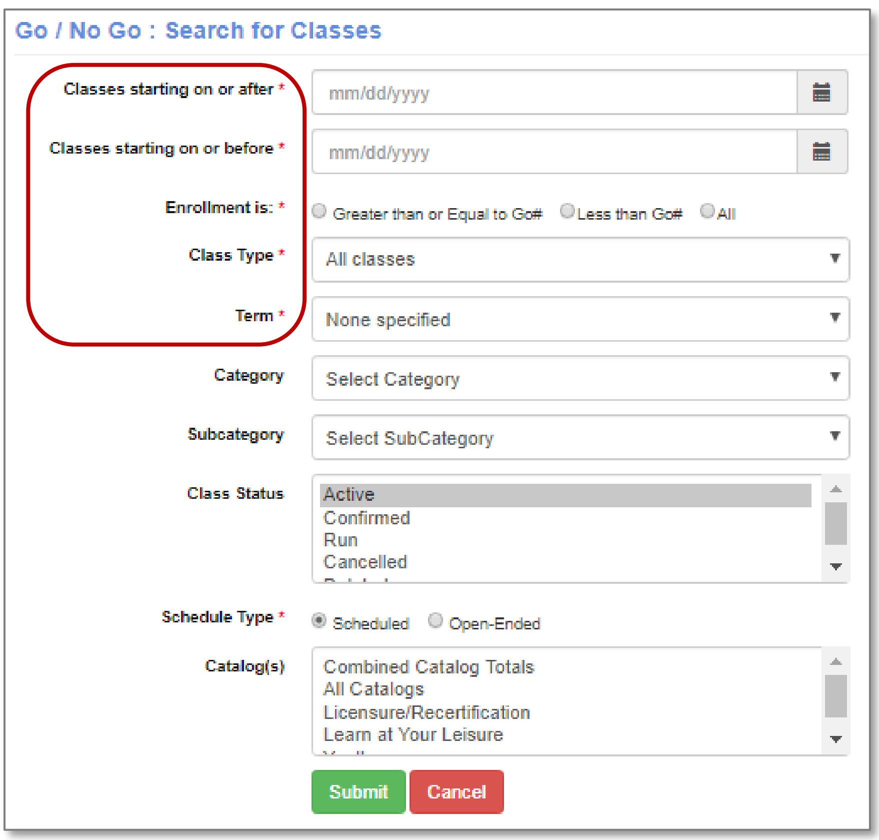
Objectives for Intermediate Class Information:

- 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.

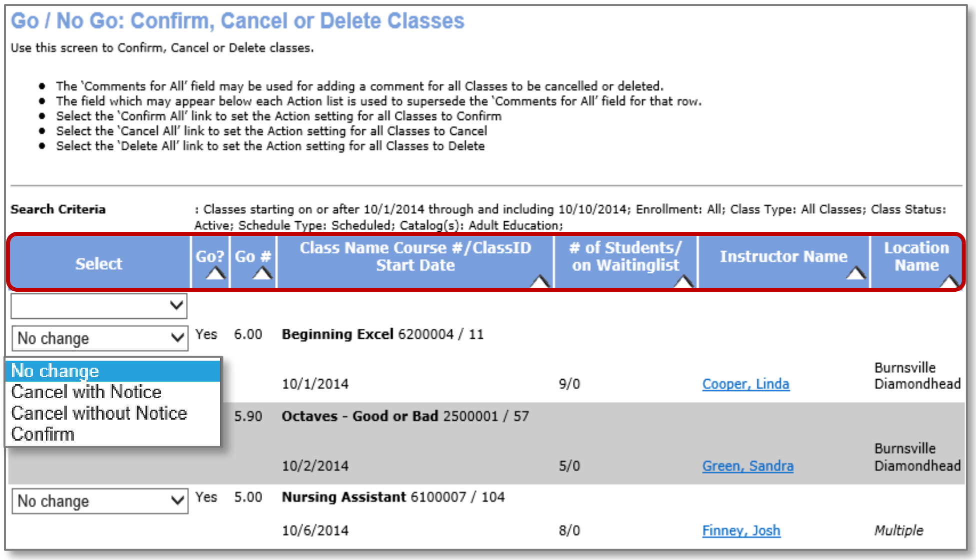


- You can choose to have the Go / No Go number calculated by either: the number of Student Registrations or by Class Receipts.

Other filter options:

- Enrollment is greater than / less than / or equal to *Go Number*
- Class type (Classroom, online, hybrid)
- Schedule Type (scheduled or open-ended)
- By Catalog, if they are used.

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



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:

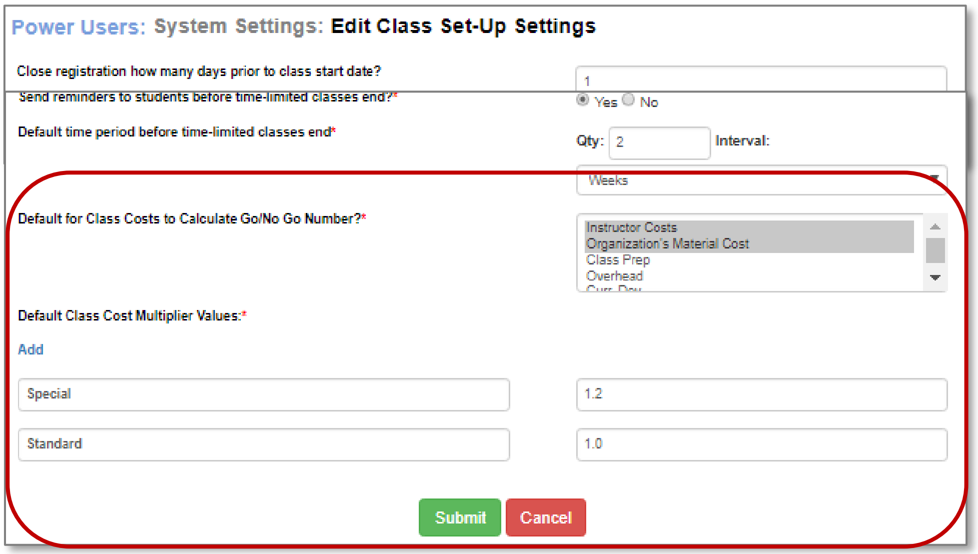
- Cancel with or without a notice, Confirm, or Delete (Delete is only available if there are no registrations).
- Changing the Status to Confirmed indicates the class will run.
- To speed up actions, Staff can select *all classes* from the select drop down list at the top of the page.
- The cancel or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

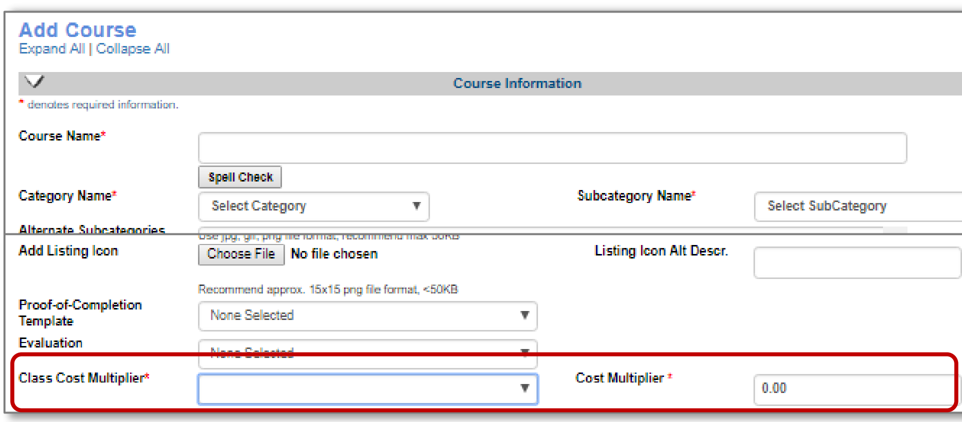
Cancel class without notice to Student requires Staff to follow up with Students. Reference *Class Info* and click on Action Items.

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.***

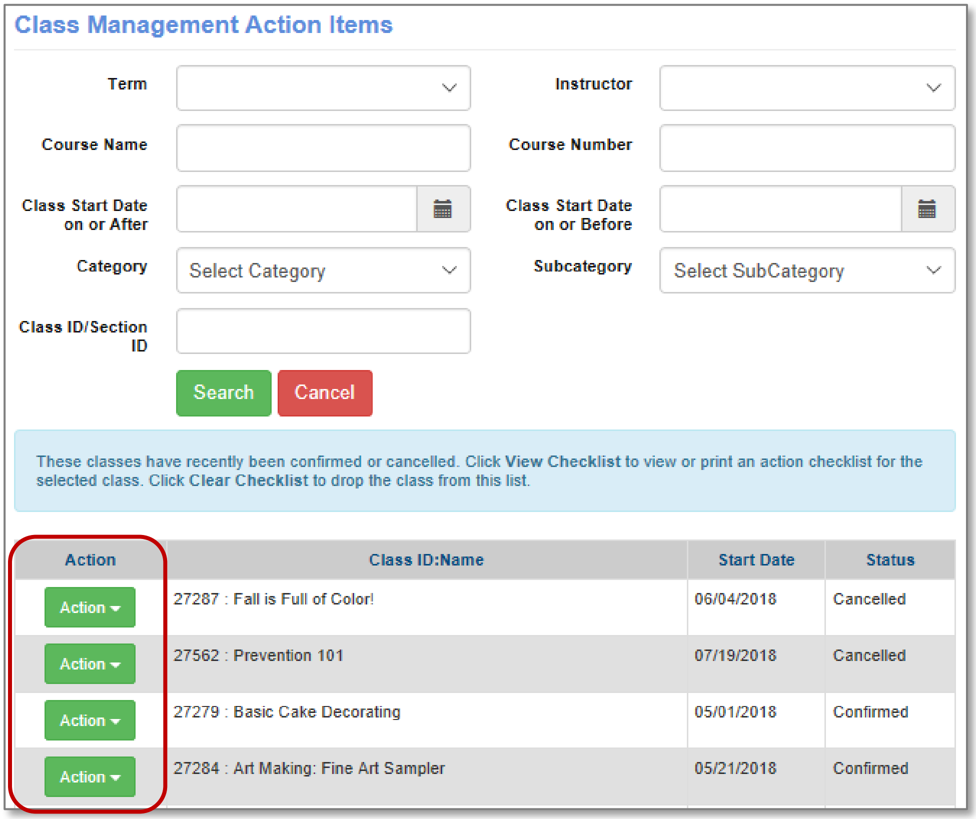


- Select default class costs to calculate Go / No Go number.
- Add/Edit names of class cost multipliers and default values.
- A cost multiplier sets a revenue amount to automate provide guidance in your Go / No Go decision.



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.

*Class Info > **Action Items***



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.

Intermediate Class Information

Class Management Action Items – Continued

iPRO PRO CLTV STND

The Cancelled Class Checklist may be printed.

Canceled Class Checklist

Back to Classes

Class Information:
Course/Class Number: 6200002/53
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 instructor? Completed By: __________ Completed On: ___/___/___
Jim Berkman
Phone(s):
612-555-7894 (Day)
612-999-5888 (Evening)
jberk@augusoft.net

Have you confirmed the location? Completed By: __________ Completed On: ___/___/___
Armstrong High School
Classroom: 110B
3618 36th Ave North
Plymouth, MN 55441
Contact Person: Susan Hanson
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.

Confirmed Class Checklist

Back to Classes

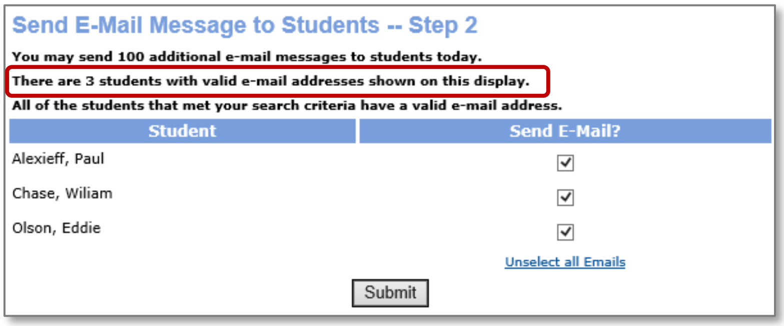
Class Information:
Course/Class Number: 6100007/104
Class Name: Nursing Assistant
Start Date: 10/06/2014
Time: 8:30 AM - 4:00 PM
Confirmed Date: 09/24/2014

Have you called the instructor? Completed By: __________ Completed On: ___/___/___
Josh Finney
Phone(s):
612-888-5555 (Day)
jfinney@augusoft.net

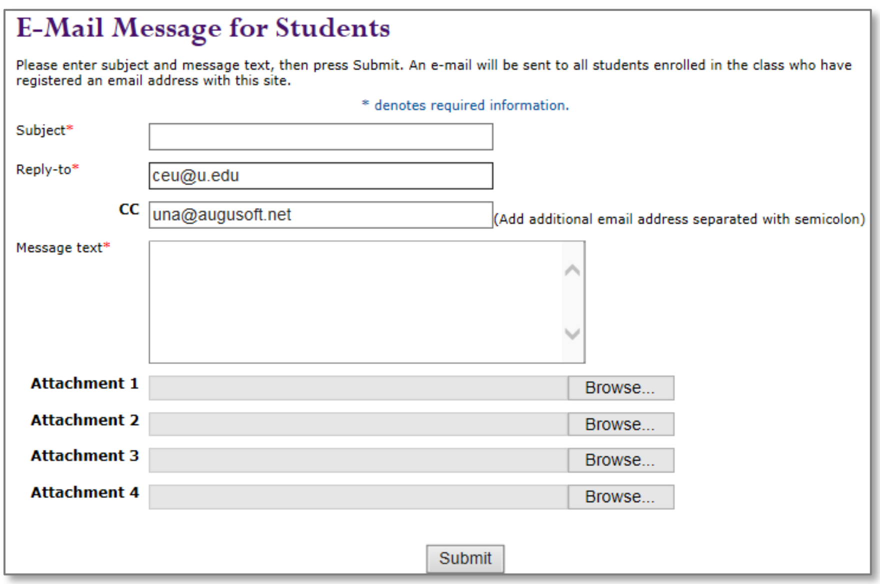
Have you confirmed the location? Completed By: __________ Completed On: ___/___/___
Apple Valley-DCTC
Classroom: 220
14200 Cedar Avenue
Apple Valley, MN 55124
Contact Person: Gloria Kowalczyk
612-555-7474 (Day)

- 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.

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.



- The Students won't display if you already cancelled them.
- If you previously cancelled the *class with a notice*, those Students have already received the *Email Template: Cancellation Notice-Student.*



- Upon *Submit,* or send, the same email message for Student 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.

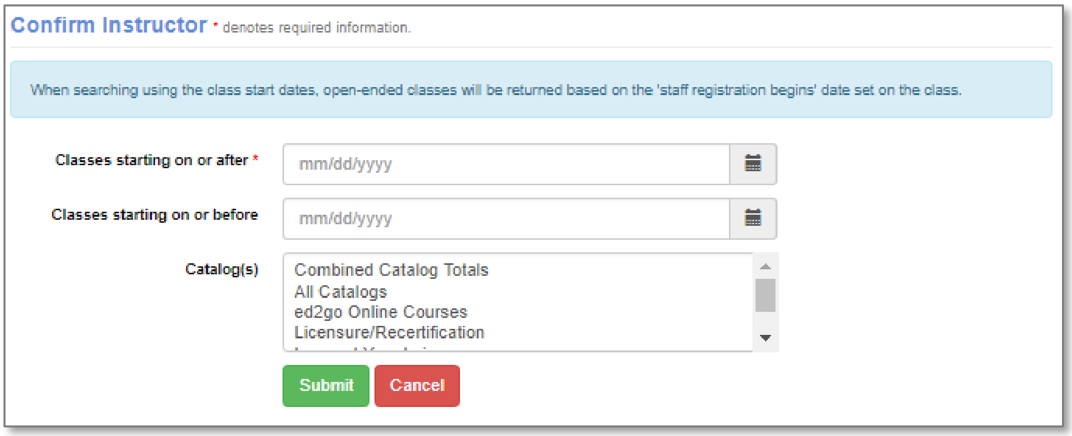
Intermediate Class Information

Instructor Checklist

iPRO PRO CLTV STND

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.

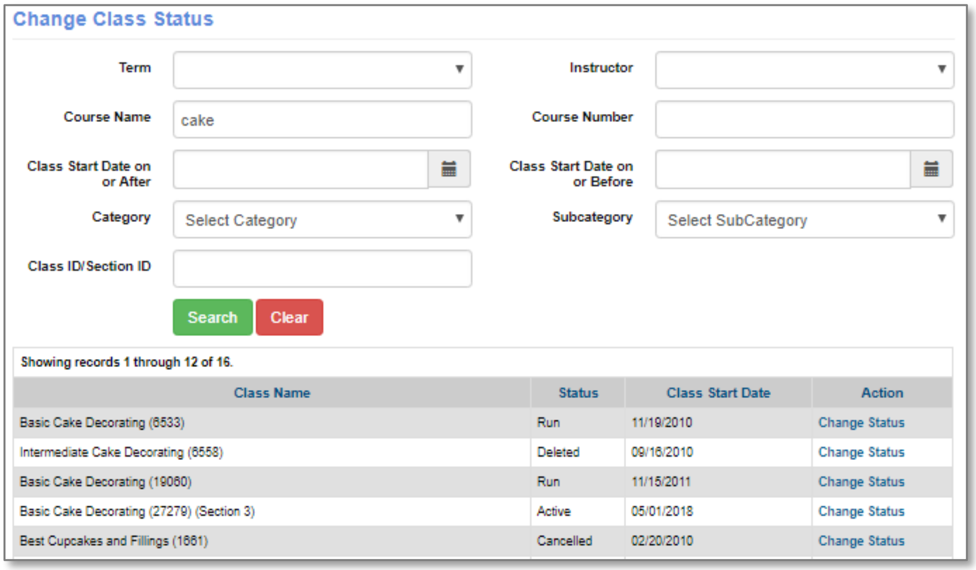


<ins>Additional Reference:</ins>
QRA available in *Customer Support* > *Document Center* > *Quick Reference Library* > ***Instructor Checklist***

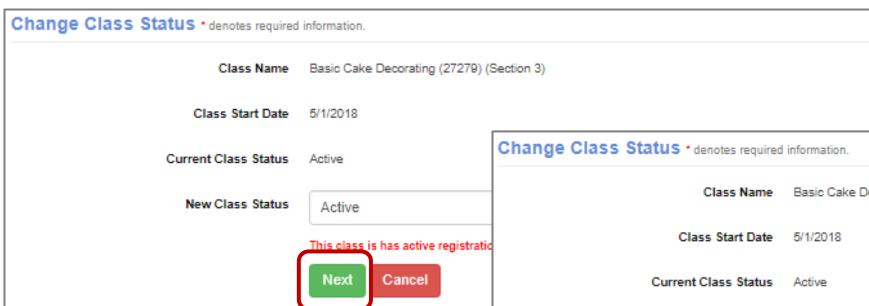
<ins>Ripple Effect:</ins>
Using the Instructor Checklist does confirm an Instructor in the Go / No Go feature.

*Class Info > **Class Status Change***

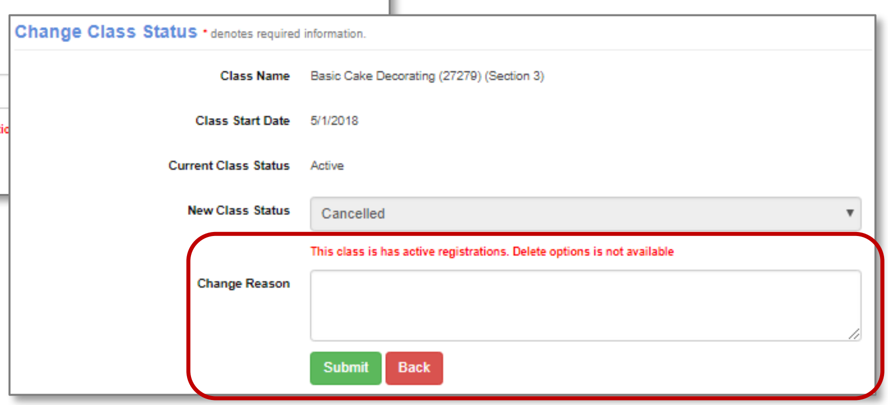
This feature allows Staff to change a class status manually.



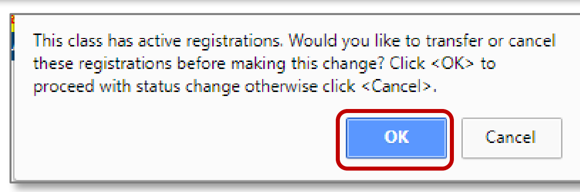
- Click *Change Status*



- From drop down, select the new status.



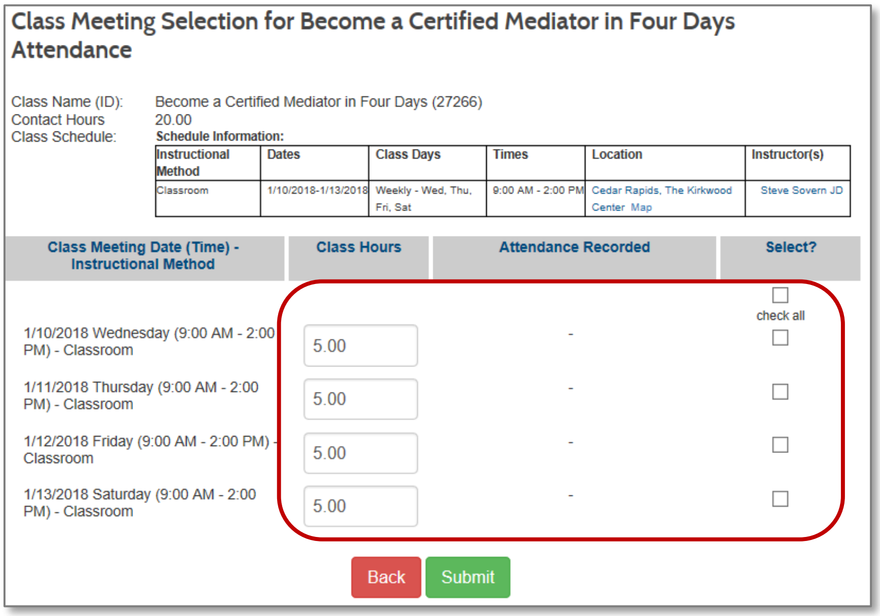
- When Staff changes a class status to cancel, if class has registrants, a pop-up opens.
- By clicking *OK*, the class is cancelled, and automatically moves to *Class Info > Action Items* for follow up tasks.
- Students do not receive any notification when this type of change is processed.
- This tool is very seldom used. It is primarily for adjusting the status temporarily to fix an error.



<u>Ripple Effect:</u>

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

*Class Info > **Record Attendance***



Class Meeting Selection for Become a Certified Mediator in Four Days Attendance

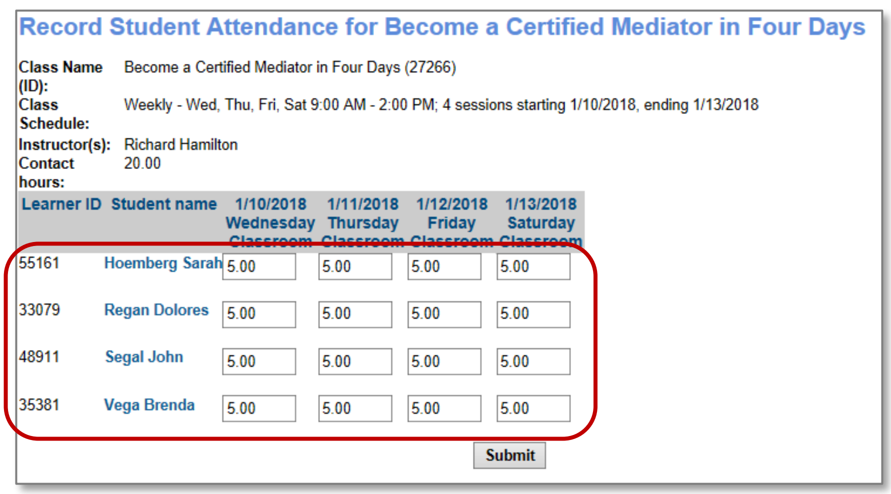
Class Name (ID): Become a Certified Mediator in Four Days (27266)
Contact Hours 20.00
Class Schedule: **Schedule Information:**

Instructional Method	Dates	Class Days	Times	Location	Instructor(s)
Classroom	1/10/2018-1/13/2018	Weekly - Wed, Thu, Fri, Sat	9:00 AM - 2:00 PM	Cedar Rapids, The Kirkwood Center Map	Steve Sovern JD

Class Meeting Date (Time) - Instructional Method	Class Hours	Attendance Recorded	Select?
			check all
1/10/2018 Wednesday (9:00 AM - 2:00 PM) - Classroom	5.00	-	
1/11/2018 Thursday (9:00 AM - 2:00 PM) - Classroom	5.00	-	
1/12/2018 Friday (9:00 AM - 2:00 PM) - Classroom	5.00	-	
1/13/2018 Saturday (9:00 AM - 2:00 PM) - Classroom	5.00	-	

Back Submit

- Attendance will display for any session that has past.
- The number of hours is based on the class schedule.
- Class hours can be changed for the entire session here.



Record Student Attendance for Become a Certified Mediator in Four Days

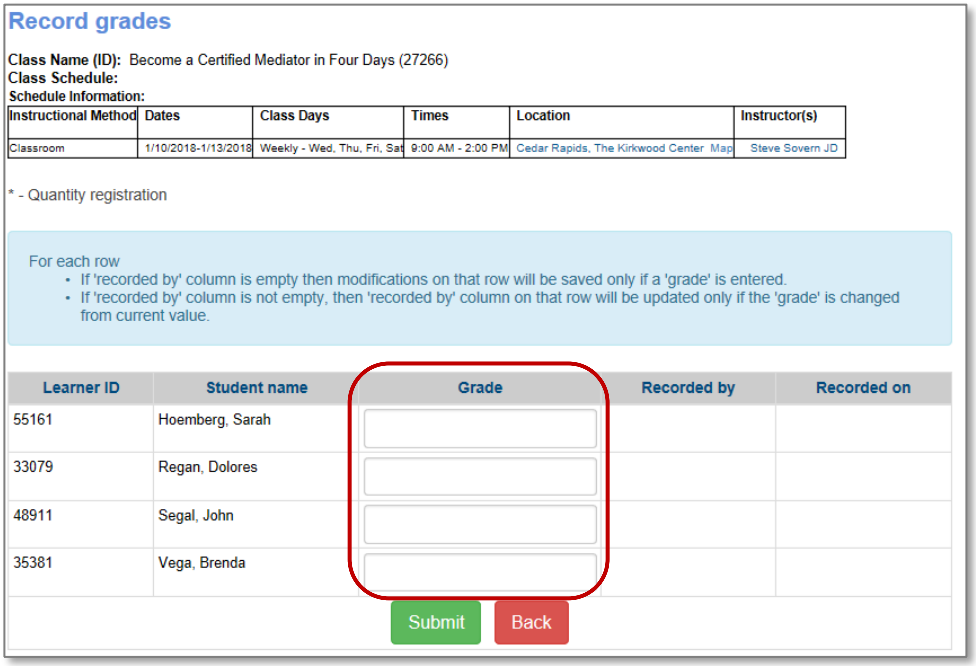
Class Name (ID): Become a Certified Mediator in Four Days (27266)
Class Schedule: Weekly - Wed, Thu, Fri, Sat 9:00 AM - 2:00 PM; 4 sessions starting 1/10/2018, ending 1/13/2018
Instructor(s): Richard Hamilton
Contact hours: 20.00

Learner ID	Student name	1/10/2018 Wednesday Classroom	1/11/2018 Thursday Classroom	1/12/2018 Friday Classroom	1/13/2018 Saturday 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

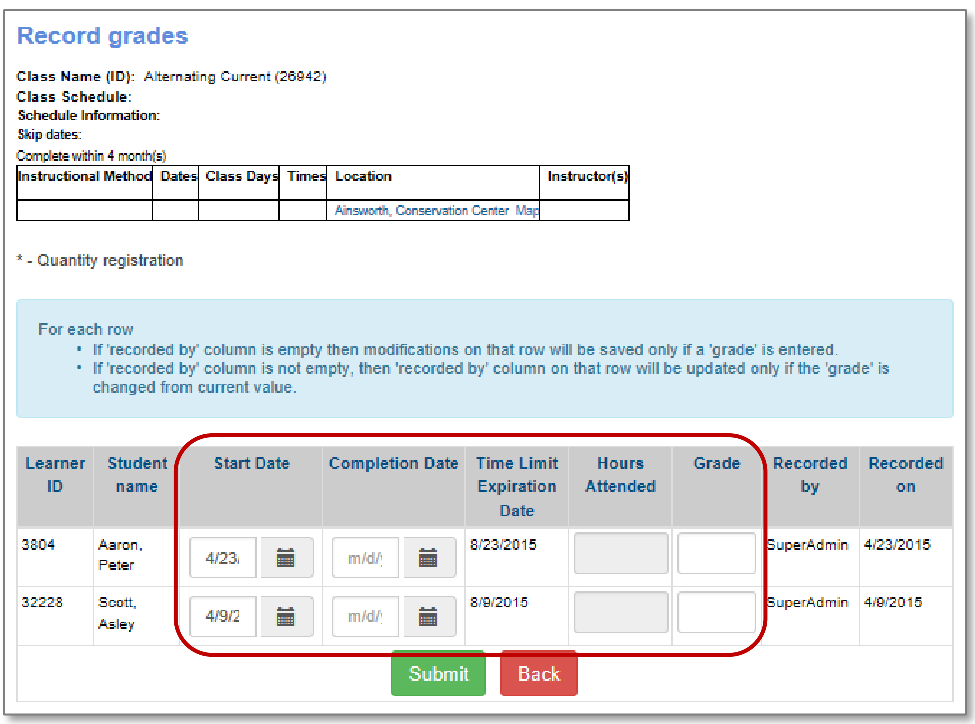
Submit

- Check applicable students to record attendance.
- Enter absences. If Student(s) absent record time attended.

*Class Info > **Class Grades***



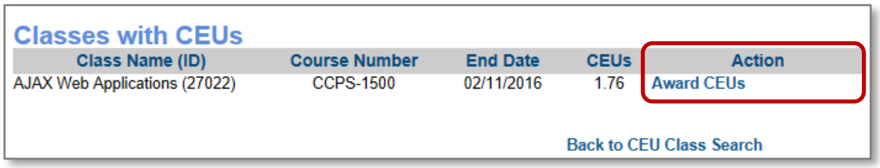
- Staff can record grades for current, future, and past classes.
- Assign grades to each registrant.



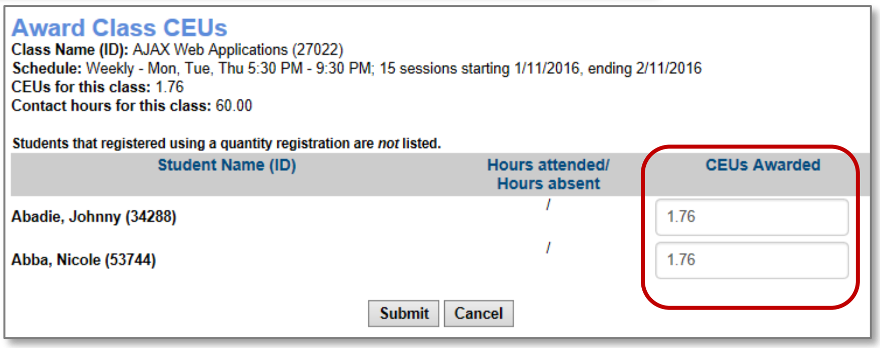
Online & Open Ended classes:

- Grades is where you will document class completion dates, hours (based on what is entered in the class), and grades.

Class Info > ***Record CEUs***



- Choose the action Award CEUs for the applicable class.



- 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

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

<u>Ripple Effect:</u>
Data from these features are included in Student transcripts available in Lumens.

Class Info > ***Release Forms***

Release Forms

Blue type denotes required information.

Include forms completed on or after	mm/dd/yyyy
Include forms completed before	mm/dd/yyyy
Release Form	None specified
Term	None specified
Select Results Sort	Student Name
Show Cancelled/Transferred Students?	Yes ◯ No ◯

- Search for a specific online release form completed during the registration

Release Forms

Student Name	Certificate/Class/Course Series	Form Completed On	Print Form?
Aaron, Michelle	75-hour Nurse Aide / 27006	10/20/2015	☐
Aaron, Michelle	Testing 4 - Go/No Go Example / 26989	11/10/2015	☐
Aaron, Ruth	Testing 4 - Go/No Go Example / 26989	09/09/2015	☐
Aaron, Ruth	75-hour Nurse Aide / 27006	11/16/2015	☐
Cage, Amy	#1 Lead Abatement Contractor Test / 26964	07/08/2015	☐
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

<u>Additional Reference:</u>
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*

Knowledge Review

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 up a Staff profile.

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.”

Knowledge Review

Intermediate System Options Review Key

Review answer key:

Promotions created apply to the entire __________shopping cart____________________

New User Roles are not _________required_____________________ to set up a Staff profile.

There are 4 types of form fields for the Optional Fields. They are ____Select Box, Multi-Select Box, Radio button, and Text ____.

To push an optional field out to your Lumens site, you must click on the ____Generate HTML code for all form fields link____.

To ensure optional fields display in reports after creation you must first ______________________populate the field in at least one location______________________________________ 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***

Knowledge Review

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?

- ○ 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)
- ○ Week(s)
- ○ Month(s)
- ○ 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.

Knowledge Review

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. **True**	
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? ○ All of the above	
If you create a 'lesson release time" statement, Lumens offers you two options; 'at your own pace' and 'weekdays. **False**	False: Lesson Release Time text can be any item you chose. It can be added and inactivated as needed.

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

Knowledge Review

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 __________________________________.

Knowledge Review

Intermediate Student Management Review Key

Review answer key:

A catalog requestor can be converted to ______a Learner profile_____________________

If a person submits a catalog request on the website, these request go to which mailbox ________________________________Organization Catalog Request Mailbox ____.

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

Student confirmations are viewable as both _______email & print__________________.

Additional Reference: *Customer Support Menu > Document Center > Lumens Lite >* ***What a (catalog) Production***

Knowledge Review

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?

- o Register
- o Remove
- o Email Students
- o 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
- o 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
- o Changing the Refund Method
- o None of the Above

Review answer key:

Expected Results	Related Information
Which of the following processes does the Staff have the ability to manage in the waiting list functionality? o All of the Above	
The service fee on a transfer/cancel is based on what Lumens functionality? o 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 o Changing the Refund Amount	

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

Knowledge Review

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 ____.

Knowledge Review

Intermediate Instructors Review Key

Review answer key:

Emails to Instructors allow the Staff to create a _________manual___________ email.

Instructor confirmations provide an opportunity to have the Instructor peruse the class content before the ________Catalog is created________.

The 'emails to Instructors' does not affect the number of _____daily emails the Staff can send____.

Additional Reference: *Customer Support Menu > Document Center > Quick Reference Library >* ***Instructor Email to Students***

Knowledge Review

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?).

Class confirmation completed using the ______________________________ does not send out an automated reminder email.

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 ______________________________ and generates the Learner reminder email to Learners.

The Go/No Go tool provides Staff with ______________________________.

Knowledge Review

Intermediate Class Information Review Key

Review answer key:

Class confirmation completed using the _____Class Status Change function_______ does not send out an automated reminder email.

The Action Items checklist is a ____Printable Tool_______________________.

You can send emails directly to registered students using the email Students feature in the ___Action Items view____.

The Go/No Go tool allows you to ___confirm a class__________________________ and generates the Learner reminder email to Learners.

The Go/No Go tool provides Staff with ________the go/no go number, and the registered Student number and the recommendation of whether to run the class or cancel_______________________________.

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