Lumens PRO Level 3 Program

Lumens Advanced

Contents

Level 3 Program Overview

Introduction

Welcome to Augusoft Lumens!

In this workbook, you will learn the advanced features of Lumens such as tracking methods, course series, reports.

If you did not complete Lumens Basics and Intermediate, you may need some assistance in fully understanding the navigation of Lumens to participate in this module.

The Lumens PRO Level 3 program is designed to build on the basic knowledge in Levels 1 and 2 and begin preparation and support of your production site.

Lumens PRO Level 3 will include advanced training on the following topics:

- Advanced System Options
- Advanced Course Management
- Advanced Instructors
- Reports
- Advanced Registration
- Advanced Financial Management

Before we begin, access your staging site which we have been using since Day 1 training (your sandbox). Throughout the training process, please follow along and access the same views as we do in the workbook.

List your Organization’s staging site address:

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Level 3 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 also to frame thought about the way you will setup your site.

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

Advanced System Options

Tracking Settings

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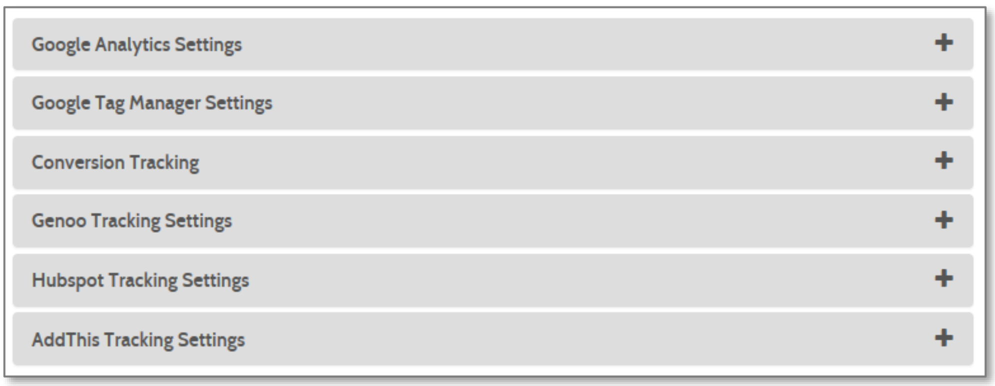
Objectives for Advanced System Options:

- Describe Tracking Methods
- Discuss Response Analysis options
- Define the Inactive/Active view in Lumens
- Review Dashboard Admin

*System Options > **System Preferences***



Here are a few Marketing Tools available to you.

Genoo Tracking: Genoo® is a full featured cloud-based marketing tool that enables your organization to automate your marketing efforts and better target communications with your customers and prospects. You can capture website interest and track engagement levels among prospective Students and corporate clients (customers). Genoo provides many additional marketing tools. There is an annual fee. If interested, contact your Implementation Manager.

Google Analytics: is a basic website tracking tool. This is a free service from Google.

Google Tag Manager: is a tag management tool used by marketing teams.

Google Conversion Tracking: is a free tool that shows what occurs after a customer clicks on your ads.

Hubspot Tracking: is a marketing software platform.

Add This: offers a widget that allows a visitor to bookmark and share your site.

<u>Question</u>:

These are various Marketing tools. Do you have a contact point in your organization, to discuss these options?

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System Options > ***Response Analysis Setup***

The Response Analysis tool is available on your Lumens site. This tool provides a single question, which can be used to gather information about registrants during the registration check out process. Only one question will post at a time. When creating a new question, the previous question will inactivate.

Response analysis setup: Define question

Add new question

Question	Status	Last change date	Action
How did you hear about our offerings?	Active		Edit | Edit answers | Inactivate
How did you hear about our school?	Inactive	11/15/2016	

Report Filter: Response Analysis

No Saved Filters

Search Filter

Registration Date on or After: m/d/yyyy

Registration Date on or Before: m/d/yyyy

Includes Registrations On

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

Term: Calendar 2019, Calendar 2018

Augusoft encourages the use of this tool to help your marketing team identify what brings people to your programs. The Response Analysis report is capable of gathering data at the class registration level.

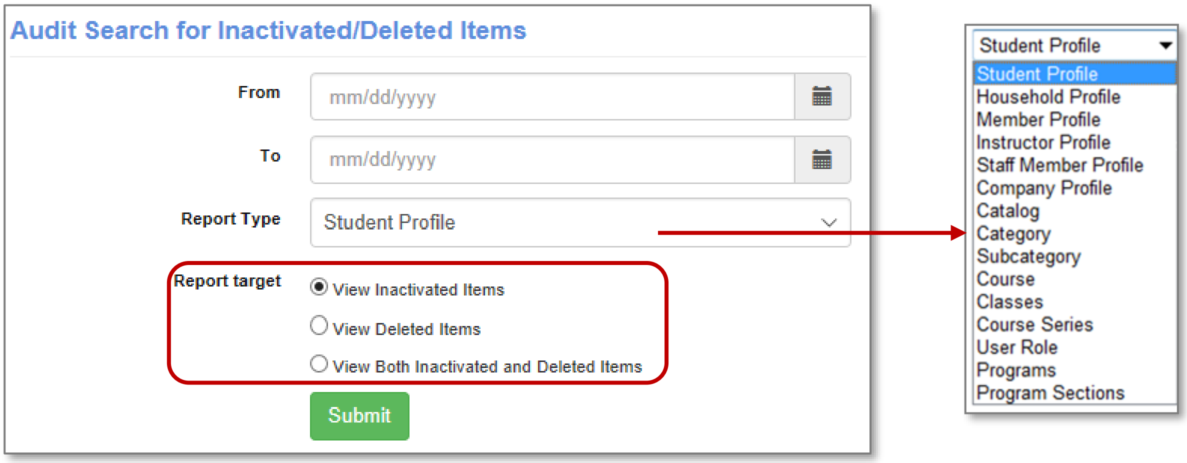
Includes registrations from April 1, 2013 to November 20, 2013

Answers	Total Student Answers	% of Student Answers	Total Staff Answers	% of Staff Answers	Total Answers	% of Total Answers
Question: How did you hear about Westwood Lake College?						
	14	24.56	43	75.44	57	100.00
A friend attends	1	50.00	1	50.00	2	3.51
Billboard	1	50.00	1	50.00	2	3.51
Catalog	4	40.00	6	60.00	10	17.54
E-mail	3	27.27	8	72.73	11	19.30
No answer	5	17.86	23	82.14	28	49.12
Radio Ad	0	0.00	4	100.00	4	7.02

Additional Reference:

QRA available in *Customer Support* > *Document Center* > *Quick Reference Library* > ***Response Analysis*** and reports are available in your Lumens site *Reports* > *Marketing* > ***Response Analysis.***

*System Options > **Inactive / Delete***

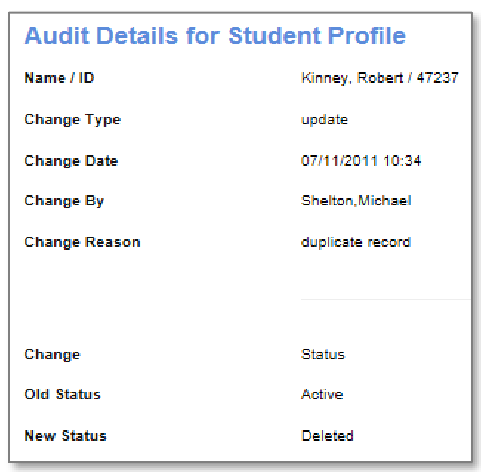


Occasionally, you may need to search for a Student, class, user role, etc. which may be inactive or deleted. When you cannot find it using the standard search function you can use this advanced search method.

Date fields are not required. The report type defaults to Student profile with other options available. Then select your Report Target; inactive or deleted items, or both and click Submit.

When you locate the file, click on, View.

The audit detail displays and tracks when the file was changed, by whom, and the reason documented at the time of the change.



Advanced System Options

Dashboard Admin

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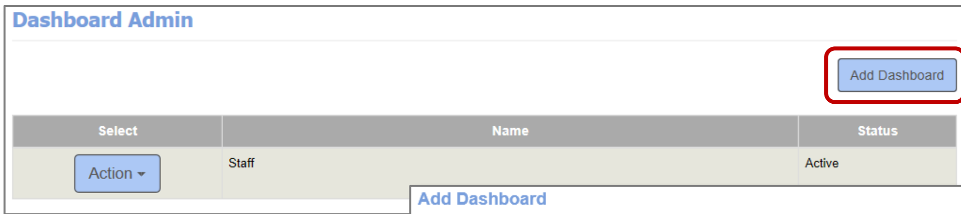
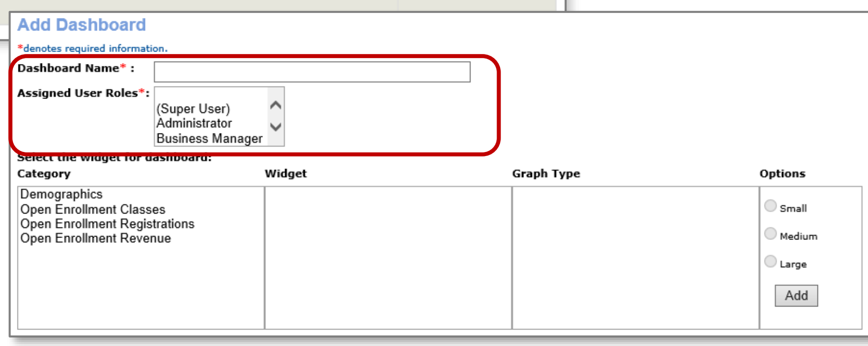
*System Options > **Dashboard Admin***

The Dashboard feature gives the opportunity to create snapshots of different areas of your program's business through graphical representation of data. Categories for data are; Open Enrollment Revenue, Contract Training Revenue, All Revenue (OE and CT), Registrations, Demographics, and Classes. Staff can create, edit, manage, and inactivate different dashboards for various Staff profiles and user roles.



To add a new Dashboard, Click *Add Dashboard.*



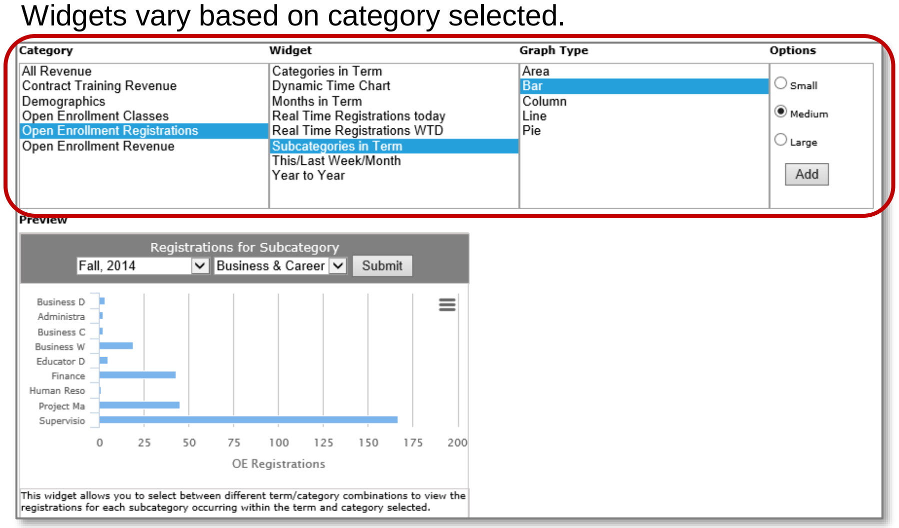
Dashboard Name: enter descriptive label; i.e., *Real Time Registration.*

Assigned User Roles:

If you have active User Roles, Staff can assign dashboard to one or more of these roles

If you are not using User Roles there is less flexibility with access control.

Category: organizational method for widgets; category selection determines widgets available, click *Open Enrollment Registrations.* A widget is a small application with a specific function. Widgets vary based on category selected.

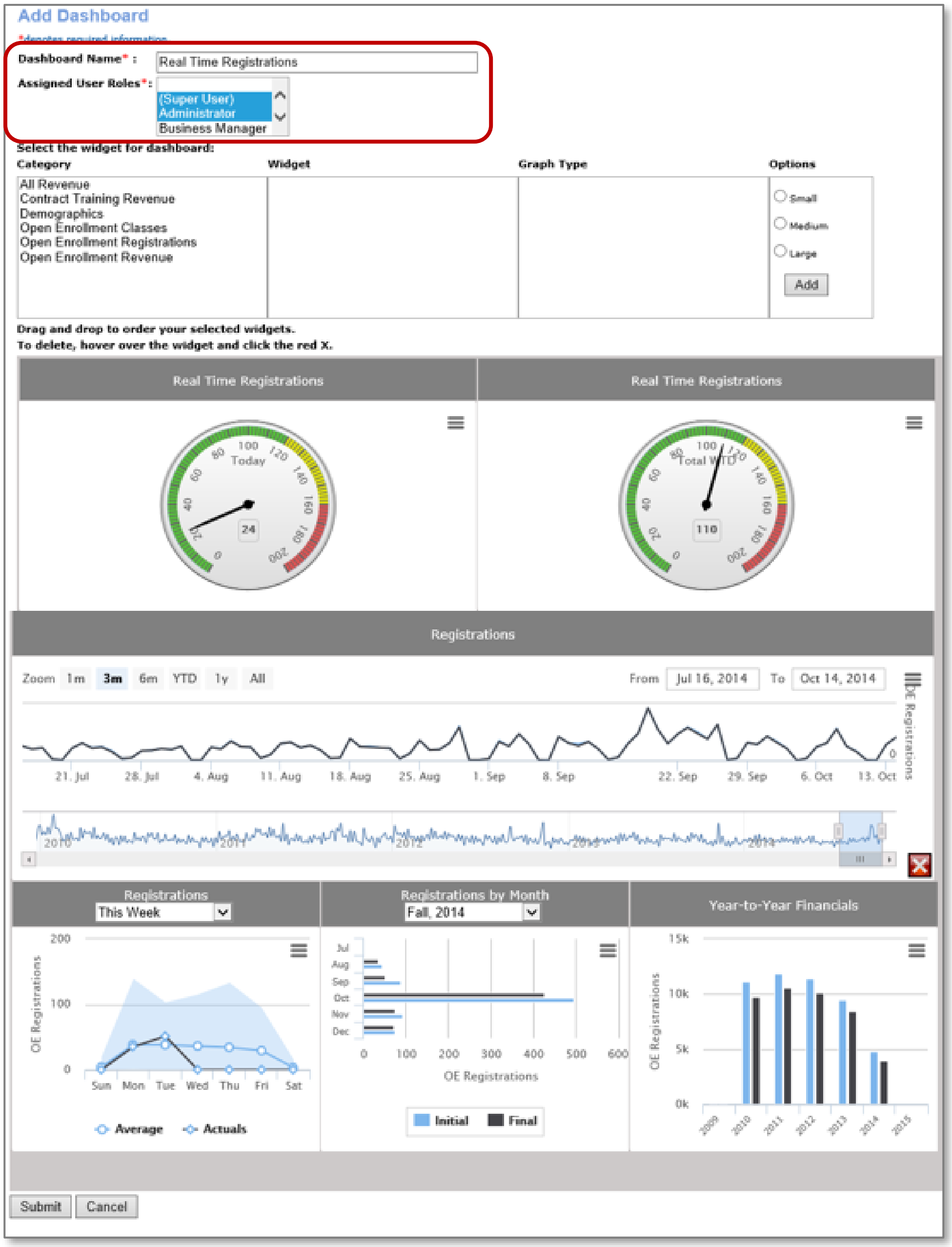


Graph Types: Is determined by category and widget.

Graph size: The default is small.

After category, widget, graph type and size selected, preview pane displays. If graph is acceptable, click *Add* button to move into dashboard. Continue this process as needed (adding more widgets). Dashboards require a minimum of 1 graph up to a maximum of 9 graphs.

After all widgets have been added; click Submit at the bottom of the page.



<u>Ripple Effect:</u>

Now, when a (Super User) or Administrator signs in to Lumens, he / she has access to the Real Time Registrations dashboard.

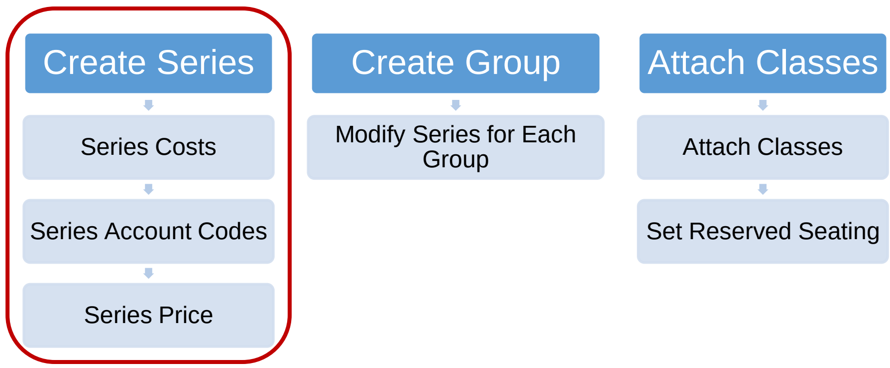
Advanced Course Management

Course Series

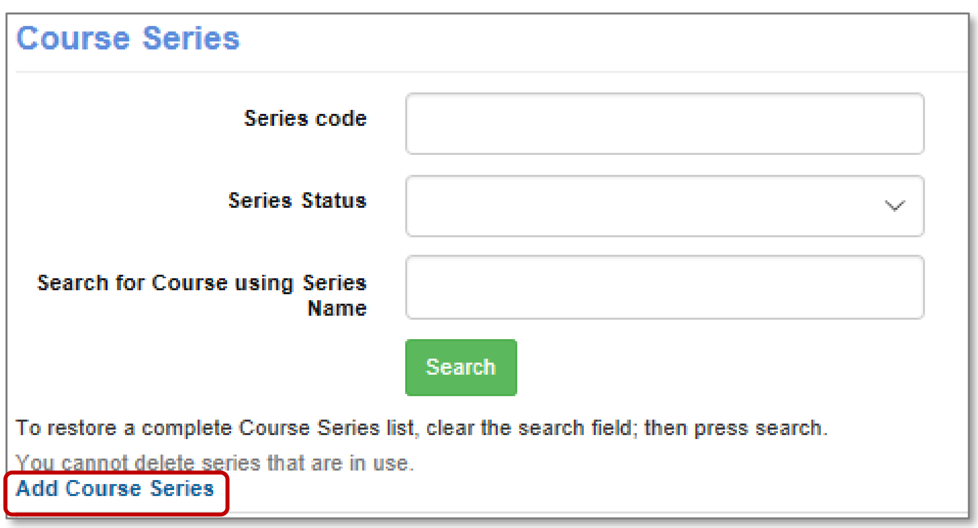
Objectives for Advanced Course Management:

- Review a Course Series in Lumens
- Discuss Evaluations
- Prepare to set up Online Course Management

This section of the workbook will focus on creating a course series in Lumens typically this is a group of classes offered at a discounted price. In addition, we will briefly review the evaluation tool and discuss online course management options for World Education, ProTrain, and UGotClass online courses in Lumens.

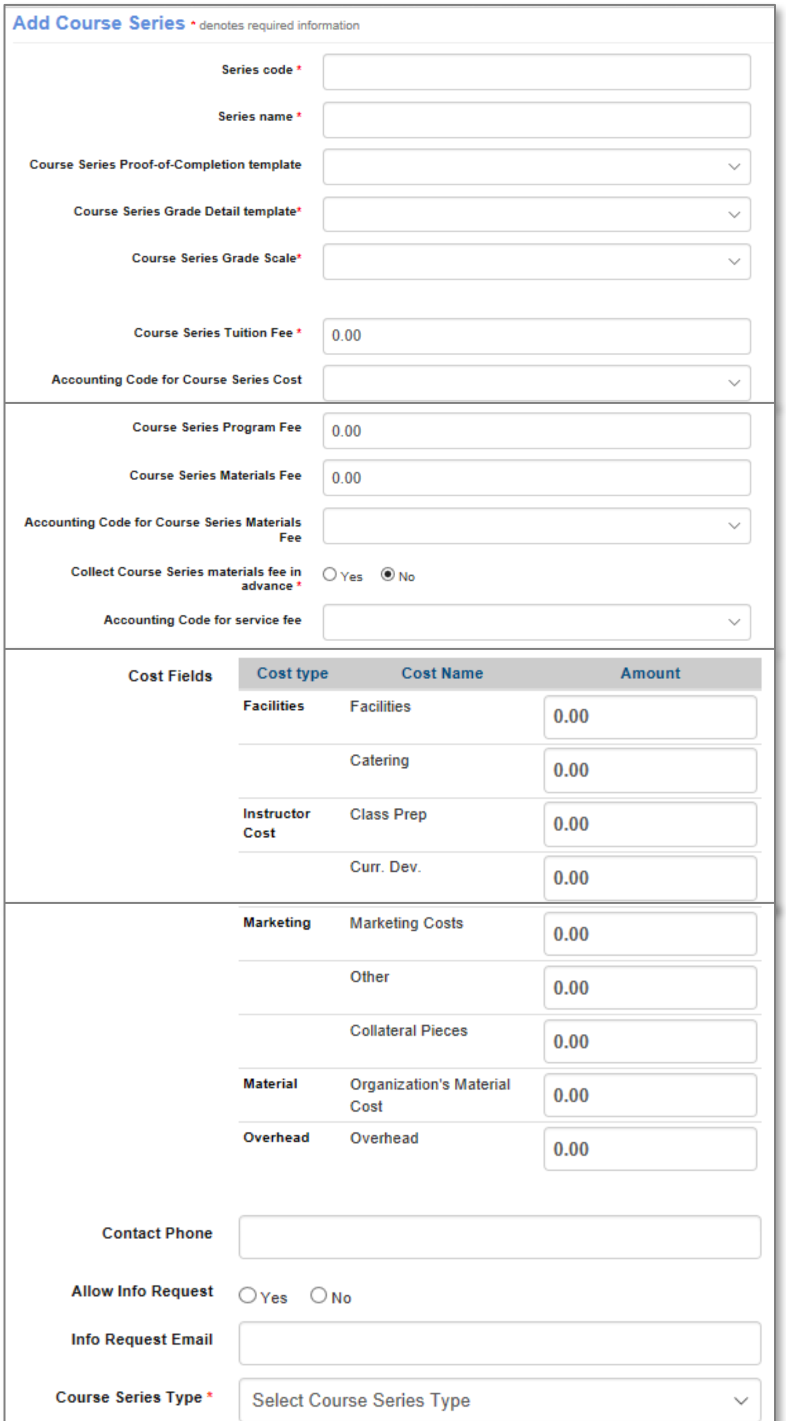


Course Mgmt > ***Course Series***



Click *Add Course Series* to create a Course Series. The classes added to the series must already be in your course/class listings.

A Course Series is a set of classes that are intended to be enrolled in at the same time for a single price. The series bundles classes and encourages a Student to register for multiple classes at a discount (discount is optional).


Add Course Series * denotes required information

Series code *

Series name *

Course Series Proof-of-Completion template

Course Series Grade Detail template*

Course Series Grade Scale*

Course Series Tuition Fee * 0.00

Accounting Code for Course Series Cost

Course Series Program Fee 0.00

Course Series Materials Fee 0.00

Accounting Code for Course Series Materials Fee

Collect Course Series materials fee in advance * Yes No

Accounting Code for service fee

Cost Fields

Cost type	Cost Name	Amount
Facilities	Facilities	0.00
	Catering	0.00
Instructor Cost	Class Prep	0.00
	Curr. Dev.	0.00
Marketing	Marketing Costs	0.00
	Other	0.00
	Collateral Pieces	0.00
Material	Organization's Material Cost	0.00
Overhead	Overhead	0.00

Contact Phone

Allow Info Request Yes No

Info Request Email

Course Series Type * Select Course Series Type

Add Series code and Series Name.

Enter the tuition fee the Series will cost, and any additional fees.

Add Accounting codes (optional).

Enter any series associated cost information

Do you want to alllow viewers to request more information?

Advanced Course Management

Course Series - Continued

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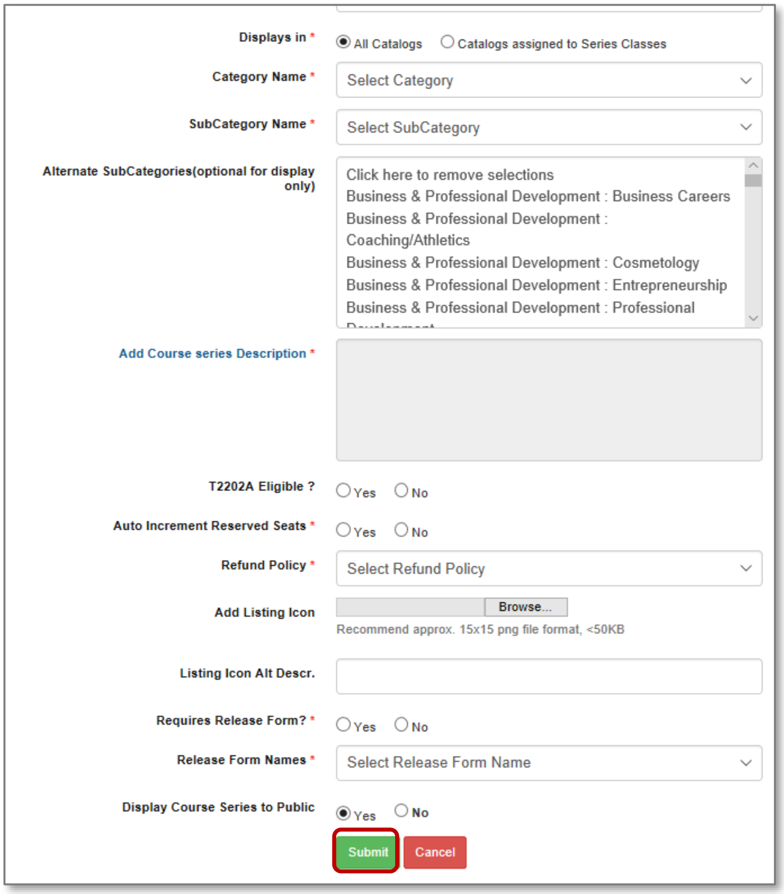
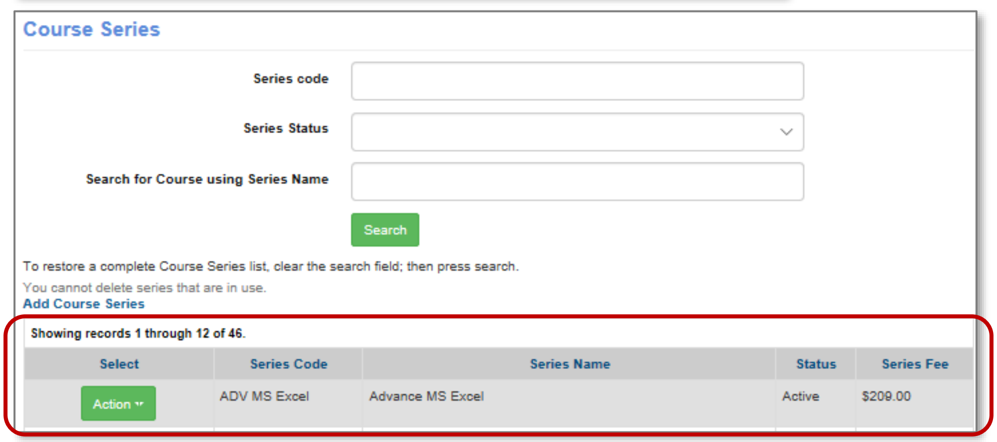


Display information is defined here.

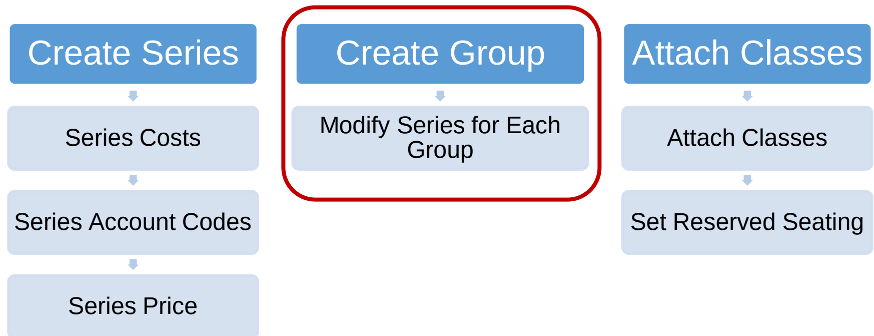
Auto Increment Reserved Seats: When reserved seats are full, the system will draw from any open enrollment seats up to the number entered here.

Lastly, click *Submit.* Thus far, the preliminary data has been set up for the Course Series.

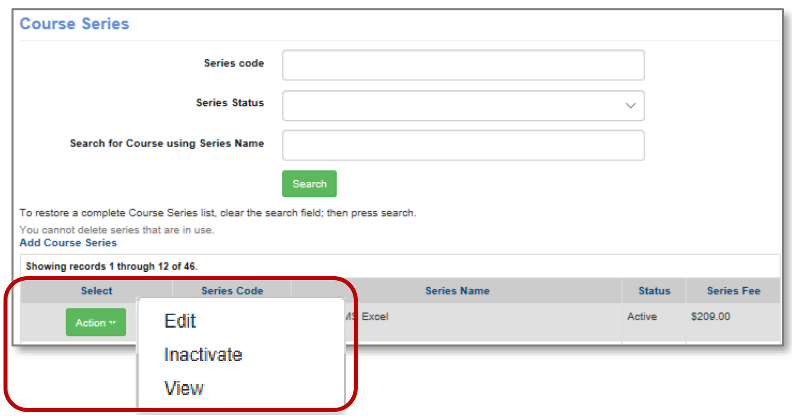


Ripple Effect:

Creating a course series is a way to connect current active classes on your site. Thus, allowing a Student to register for the set of classes all at once, and usually receiving a discount. Students can still register for the individual classes but will not receive the discount.

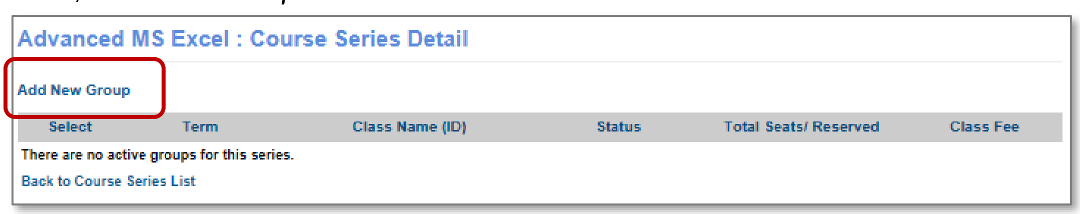


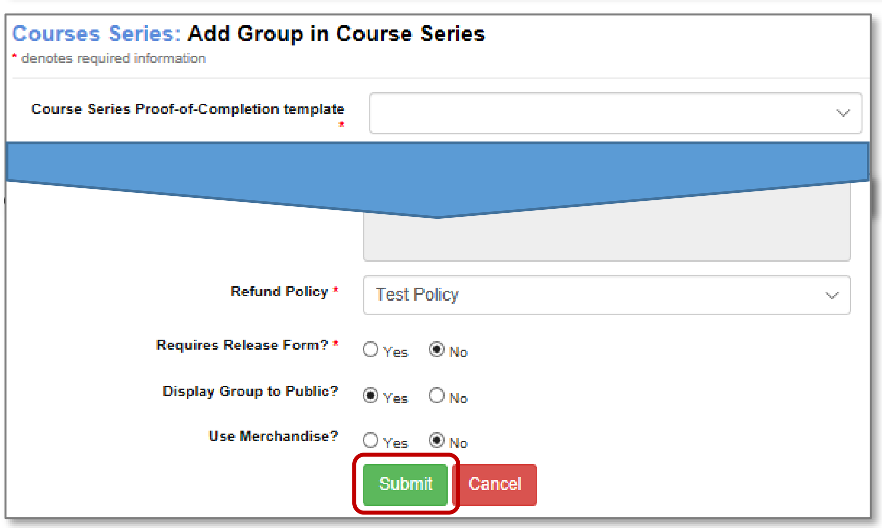
The next step in creating a Course Series is to create a group.



Click *Action* then *View* to create a series group.

Click, *Add New Group.*





The Series Group information flows from the <u>base</u> Series and is editable.

Advanced Course Management

Course Series - Continued

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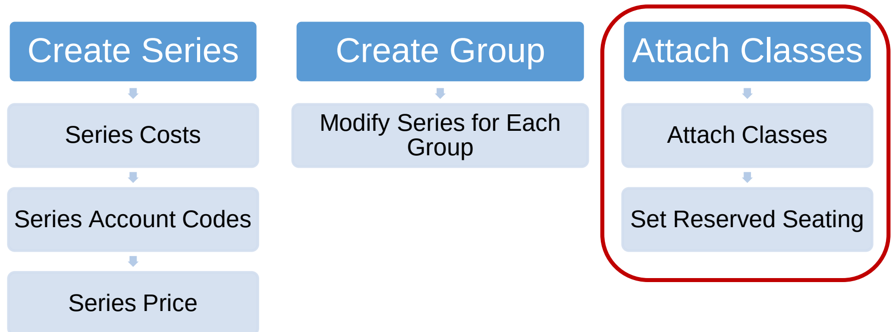
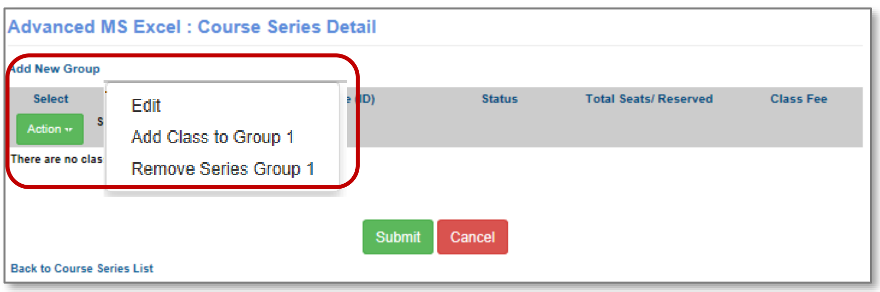
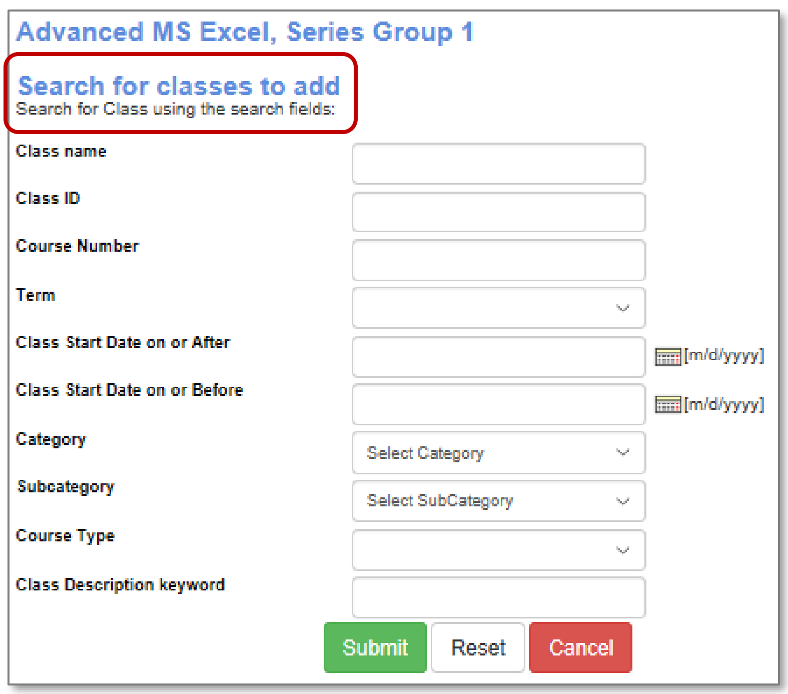


Click *Action* then *Add Class to Group*

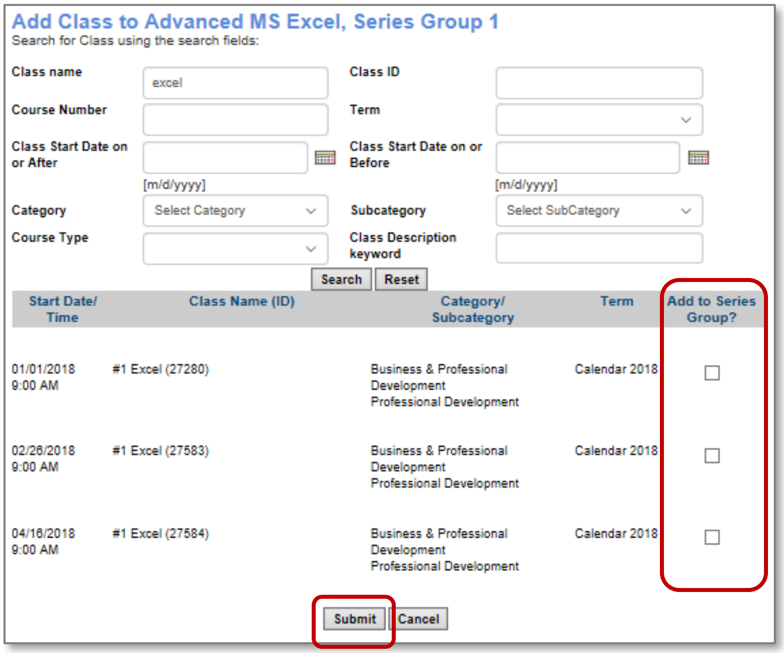




Multiple groups can be added, thereby allowing you to create multiple series with various sets of classes.

Advanced Course Management

Course Series - Continued

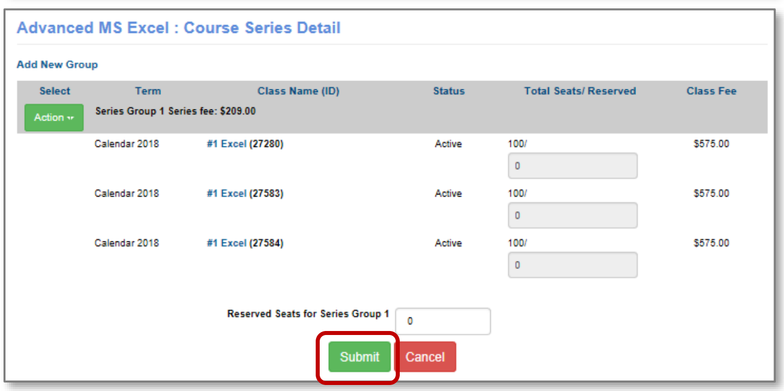


Search for classes using any of the search fields.

The class search is not limited by Category, Subcategory, term, or Course type.

Next, select any applicable classes and click *Submit.*

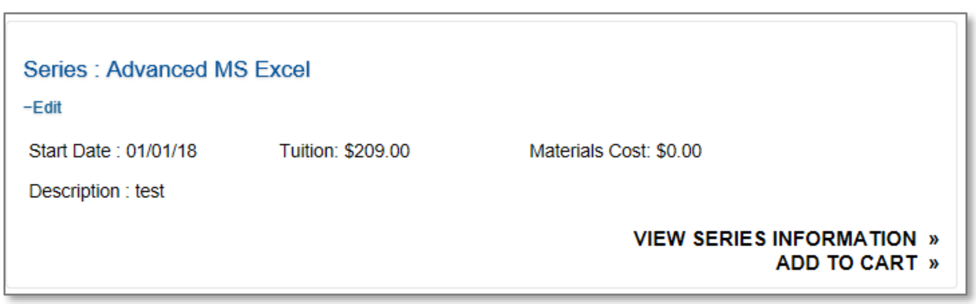
(Continue adding classes until your series is complete.)



Total seats are the number of seats per class.

Enter the number of reserved seats for Series 1.

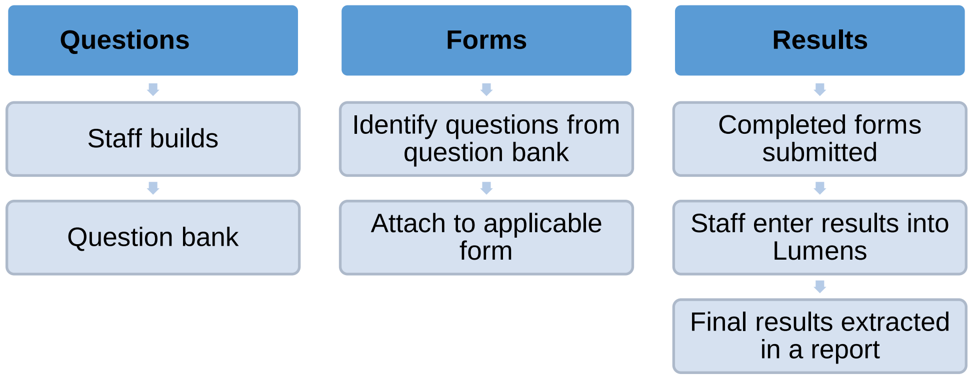
Upon clicking *Submit* Reserved seats populate each class.



This is a Series displaying for the Student.

Additional Reference:
Your website can also have a *Course Series* link added to any public facing webpage. Directions for adding a Course Series link can be found in *Customer Support > Knowledge Base > **Article #18864***

Course Management > ***Evaluation Questions***
Click on Action button and select View Evaluations.



The evaluation tool in Lumens is for creating and tracking class evaluations. Gather Student feedback about classes, instructors, training, facilities, etc. This tool allows you to create a bank of questions to select from to create any type of survey you need: Classroom evaluation, General feedback, Instructor evaluation, Lecture / Lab evaluation, etc. Once the evaluation is added, attach it to a course and / or associated classes. The form may be printed and copies provided to the Instructor. When the evaluations have been filled out, the Instructor returns the forms to your organization. Staff can record the results for the class to compose or print a summary report.

Questions can be entered with a Numeric Scale, True / False, Yes / No or Comments.

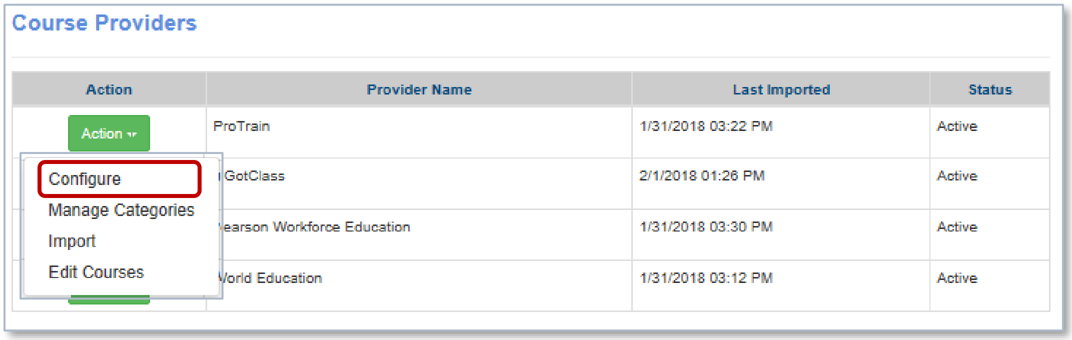
Lumens calculates the average score and the results are available in report format. This tool is valuable for tracking the effectiveness of certain types of classes, or for gathering Student feedback about a particular course. This tool is optional.

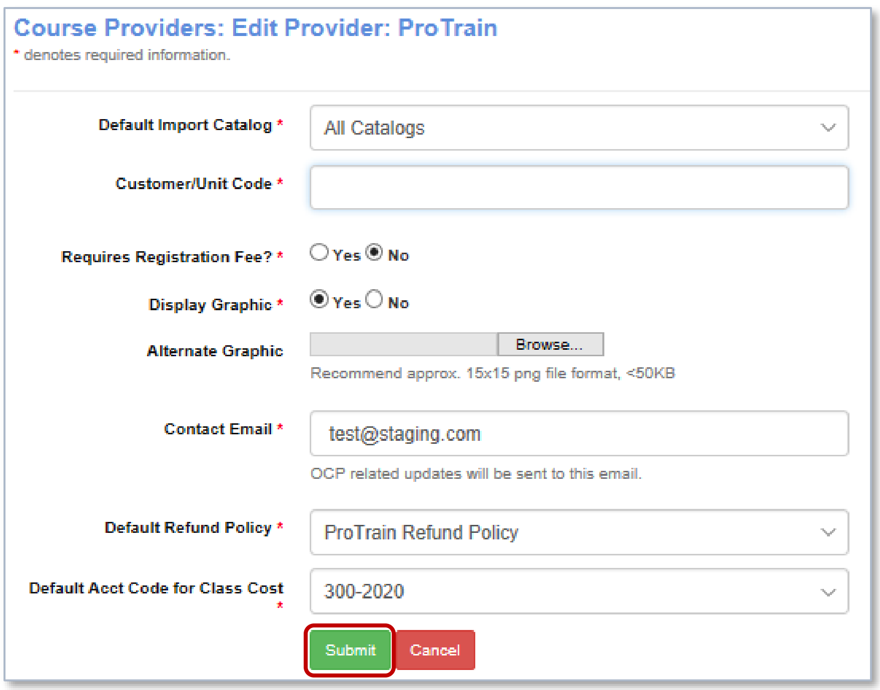
There is a QRA available in *Customer Support* > *Document Center* > *Quick Reference Library* > ***How to Use Evaluations***

<u>Retention Activity</u>:
Do you think you might use Evaluations? If so, think about what questions you want to add to the bank.

Course Mgmt > ***Online Course Mgmt***

Click Action then Configure





The Online Course Provider (OCP) supplies the codes necessary for upload to production. Your implementation specialist can assist gathering this information.

From this view, Staff can add a registration fee (if activated) and display a graphic brand your online classes. The Online Provider logos are available, you can also insert your own, using the Alternate Graphic field, or you can leave it blank.

<u>Information:</u>
The information currently in your staging site allows you to practice the import process and update without a fee involved. The class access for these courses will not apply, and the registration link is only a test function for staging.

<u>Ripple Effect:</u>
You must activate each individual Online Provider in *Power User* > ***General Settings*** in order for the option to appear.

If you are interested in using any of these online course providers, we highly recommend reading the appropriate QRA, and then contact your implementation manager to help you set up the provider(s) correctly.

The QRAs are available in *Customer Support* > *Document Center* > ***Quick Reference Library*** Search for *Initial Setup* to locate the intended instructions.

Lumens offers the above online providers. You can manually enter online classes or create a link on a Lumens web page if you are using other providers.

Process recommendation for external online classes:

- Create the class as an online class in Lumens (self-paced or time limited).
- Create and schedule a custom report (registration analysis is a good option).
    - Report includes Students registered for your in-house online class.
- Staff emails report to provider managing the online class
- Provider emails registrants access information to his / her class
- Ask Provider to notify you when class is completed, then Staff can enter Student's completion date on the class roster, which automatically updates the Student's transcript.

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

Question:
Does your organization currently offer World Education,® Pearson Workforce,® ProTrain® or UGotClass® online classes? If so, do you plan to integrate into Lumens?

Reports

Reports Groups

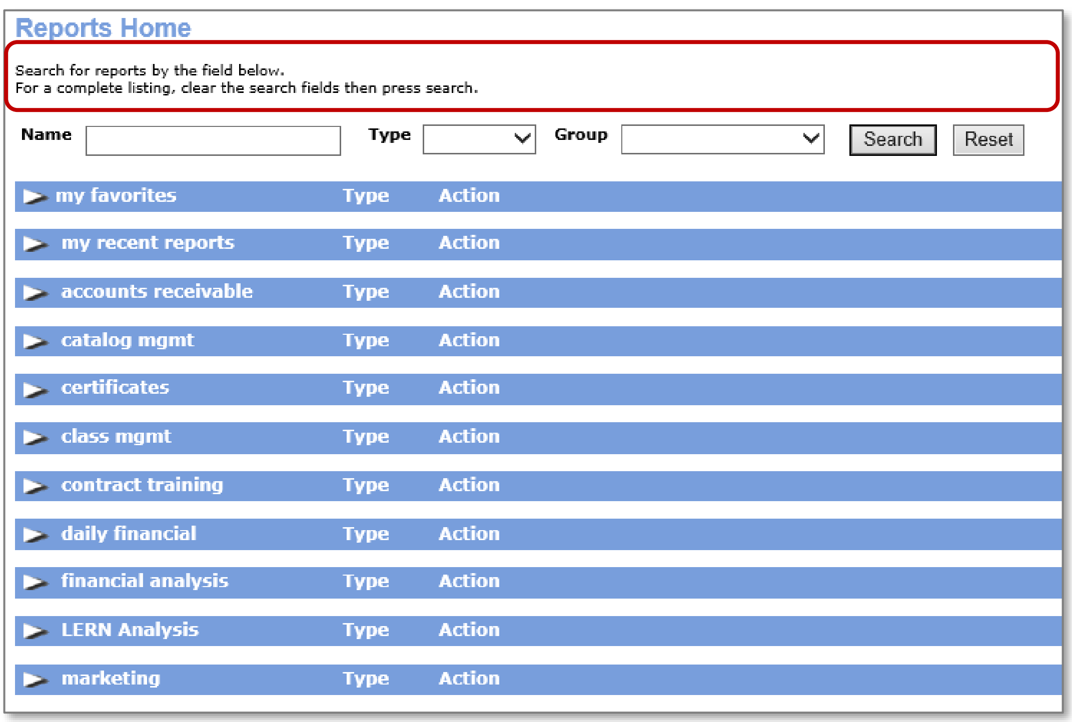
Objectives for Reports:

- Review report groups
- Run a report in Lumens
- Create a scheduled and a custom report
- Discuss standard and advanced filters

This section of the workbook reviews various report groups. There is a separate Reports Workbook available that goes into more detail.

*Reports > **Report Groups****

From the Reports Home menu, you have the option to search for a specific report(s).
Search filters include:
Name: report name
Type: standard or custom
***Group:** every report is assigned to a group: Accounts Receivable, Catalog Mgmt, Class Mgmt, Daily Financial, Financial Analysis, LERN Analysis and Marketing.



My Recent Reports display the 10 most recently used reports by the Staff person logged in.

Reports

Report Groups - Continued

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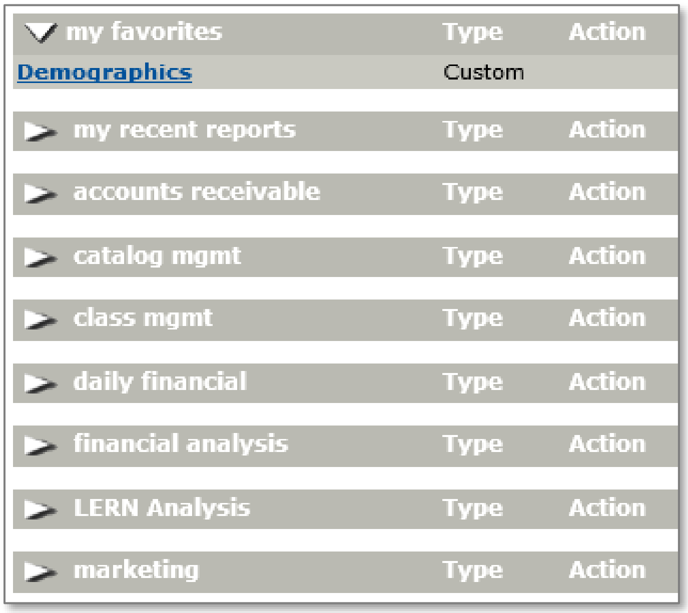
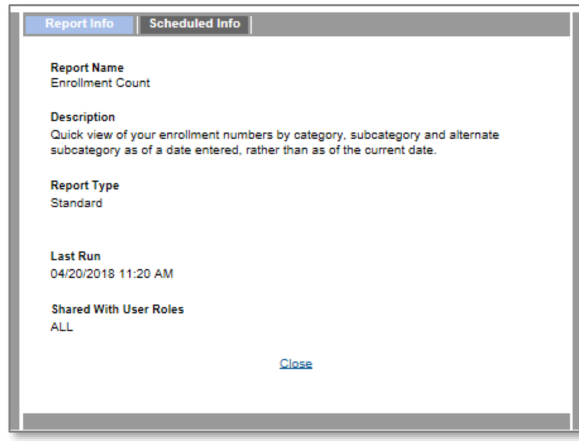
Report Groups





Reports are broken into groups (as seen above) and are categorized for knowledge purposes. We can classify reports into three types of knowledge categories.

1. **Marketing Function**:
   These reports provide a variety of data details to help your marketing staff identify who is registering for what type of classes.
   The groups include; Marketing, LERN Analysis, and Catalog Management
2. **Financial Function**:
   These reports will provide daily, weekly, monthly, and other financial tracking.
   The groups include; Financial Analysis, Daily Financial, and Accounts Receivable
3. **Class/Program Function:**
   These reports provide the information on class/programs you may be running in your organization.
   The groups include; Class Management and LERN Analysis

Every report offers details on the report itself. Click on the report name and report details will display.

The Action column displays the available options for reports.

Run / Schedule: allows a user to process the report and create a scheduled report.
Edit: allows a user to create a custom report from the base standard report.
Add to my favorites: allows user to add preferred report(s) to favorites list.
Help: launches help feature for specific report.
Delete: only available if the user created a custom report (or if a Power User).

Reports

Report Groups (Marketing) - Continued

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Who is buying your product?

Can you answer this question quickly, easily, and accurately?

Reports that can effectively support marketing endeavors are located in the Marketing, LERN Analysis, and Catalog Management groups.

Reports such as:
Demographics: Report displays student profile information and is based on student activity (profile create/edit or registration); excellent report to use for mailing lists or student data verification.

LERN Market Segments: This report provides both class and student profile data segmented by category, subcategory, and course name for marketing purposes. Useful for managing segmented mailing lists. LERN members can use this report with their Market Segment Analysis tool. There are quick reference aids available for LERN reports.

Response Analysis: Provides summary view of customer and staff responses to your customizable registration survey question.

<u>Try It!:</u>
There are many reports you can use to identify 'who is taking your classes'. Lumens tracks all the registration data to support your marketing efforts.
Run the following reports:

- Market Segments (a LERN Analysis option)
- Registration Analysis
- Response Analysis (there is a QRA that helps explain how to use this tool)

<u>Questions:</u>
Do you ask a learner what prompted a class registration at the time of registration?

Do you have a plan for mailing brochures, catalogs, and tabloids? Lumens can track the frequency of registrations and track it against addresses to help you make better decisions on who to target and when to send out marketing materials to each target market.

Do you look at the student population, demographics? For example, what classes appeal to your generation X or to male millennial's?

Reports

Report Groups (Financial) - Continued

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We recommend running reconciliation reports daily but at a minimum, weekly.

Every day a participant can register for a class. With that in mind, your organization should be consistently reviewing the registrations against the deposits that occur.

The reports we recommend reviewing:

Transaction Journal: Each transaction for date range specified is detailed; including student name and class name, transaction type, payment/refund method and amount, accounting code, and total discount amount. This is the only report to find VOID transactions. Transaction time stamp is Central Time (whereas USAePay is Pacific Time) and includes who processed the transaction.

Credit Card Activity: Provides listing of every credit card transaction by payment/refund method, credit card type, number of items, transaction amount, and identifies the staff person who processed the transaction. Plus, totals for each credit card type and date range total.

Accounting Code: This report is designed to track the total receipts and refunds per accounting codes on a daily basis. Although the report can be run for a specified date range, each day is totaled independently.

Activity Summary: This is your primary activity report and is recommended for daily reconciliation. Report provides totals for all financial transactions from open enrollment and from payments made to AR. Details include daily total, plus both gross and receipt totals.

Try It!:
As you have created classes and completed various registrations in your staging site to test, you now have enough data to give you an idea of what a reconciliation process may look like for your organization. Run the following reports:

- Transaction Journal
- Credit Card Activity
- Accounting Code

Questions:
Do you accept Cash and/or Checks? What is your deposit process?

For Credit Card reconciliation, who receives the gateway batch reports? Compare that report against the Credit Card Activity report daily to confirm charges.

Reports

Report Groups (Class/Program) - Continued

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Are you tracking the path of your classes? We encourage you to keep track of which classes have revenue that outweigh the associated costs. In addition, there are reports for day-by-day measures such as attendance, sign in sheets, rosters, etc.

Reports we recommend viewing:

Class Information: Displays class attributes for all classes regardless of status, including draft status. This report is helpful in obtaining all the possible attributes for a single class (including operating margin and go number

Class Performance: This report is designed to be extracted and loaded directly into LERN's Program Planner Tool. Allows marketing, instructor, organizational and materials costs to be evaluated.

Class Completion: Displays information about students including grades, attendance, and CEUs for all non-cancelled classes. Information displays one line per student per class, grouped by class.

What's Happening: Displays a schedule of classes or events meeting on a given date. The report is designed to provide a list of each class meeting, organized by date. An asterisk (*) is used to designate the "last class meeting" so end-of-class details can be prepared.

<u>Try It!</u>
What types of things do you need to know about your classes?

- Class Performance (if you are a LERN member think about the analysis option sorting your Stars, Cash Cows, Problem Children, and Dogs)
- Class Completion (can be run by class start or class end date)
- Class Information

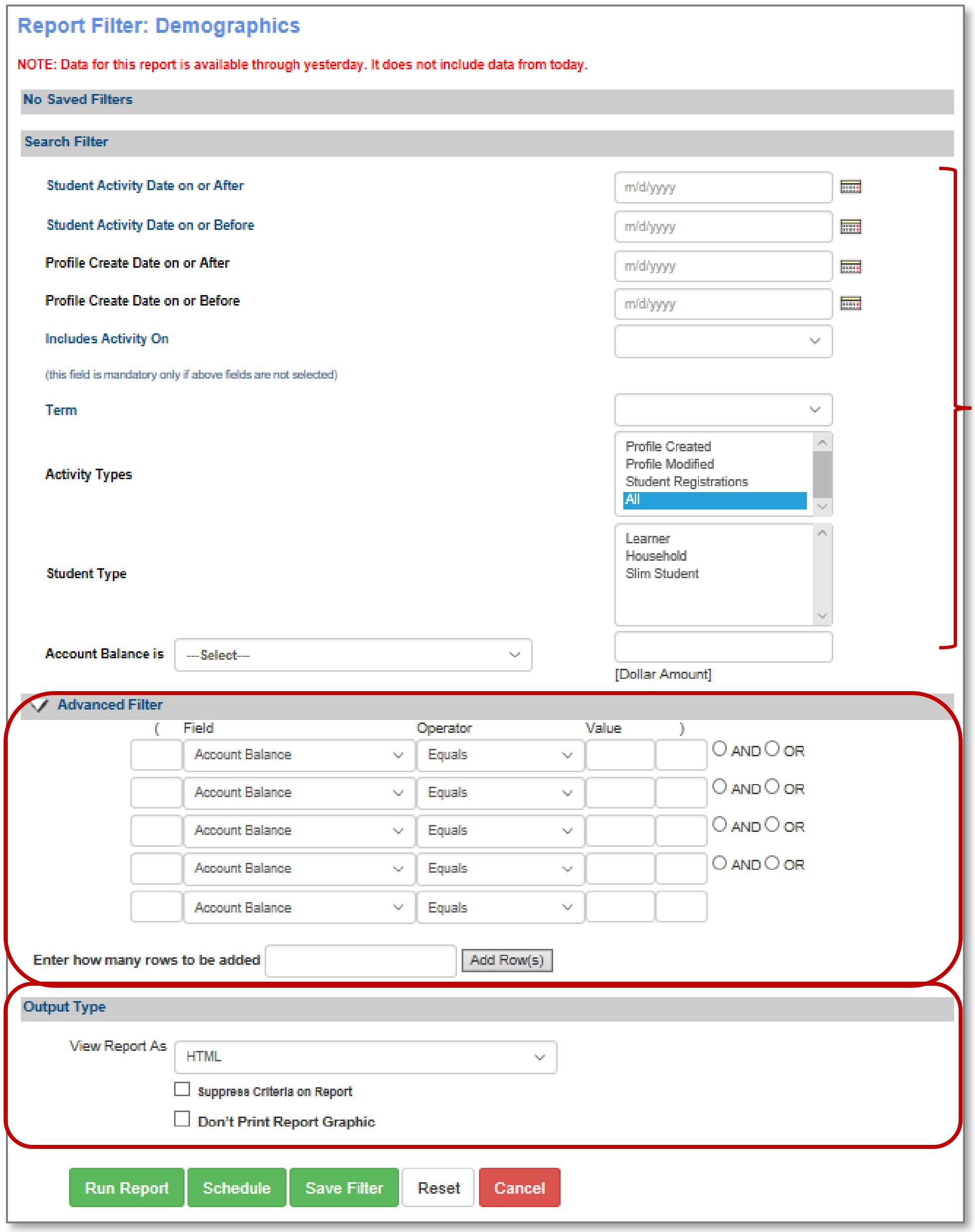
<u>Question:</u>
Are we tracking our class performance (class costs versus class revenue)?

____

Do we have state reports on registrations? Does your report base its numbers on the dates a class is run and registrations for the class or is it based on true registration dates? (be sure to select the report that filters the way you need the data)

____

Lumens Reports have several features including; custom reports, filters (both basic and advanced), scheduled (automatic) reports, and various output types.



A red notation on a report indicates a limitation in report options.

Search Filter: Each report provides various search filters.

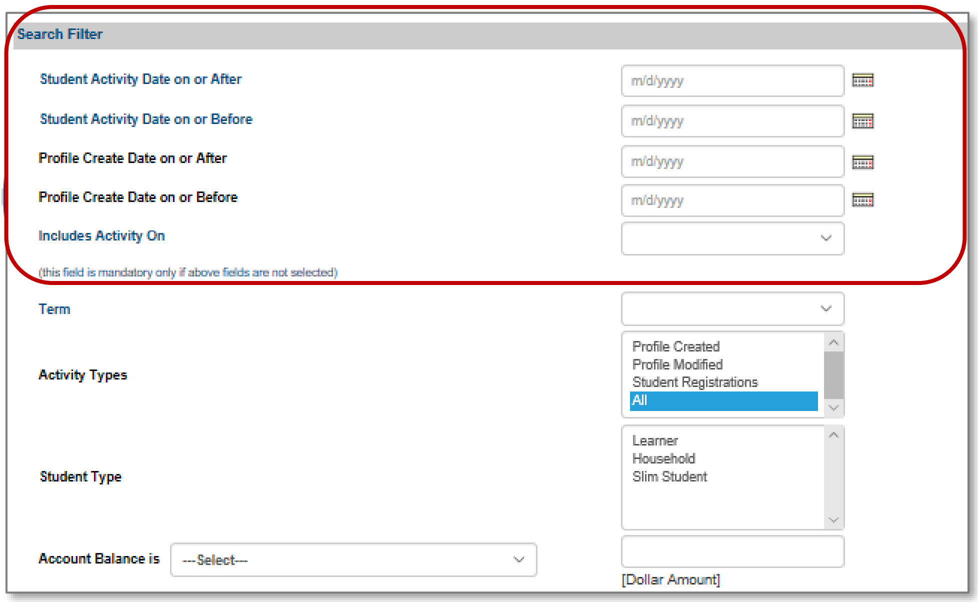
Advanced Filter: Narrow your search by selecting the Field Name(s), Operator and Value columns.

Output Type: Options include, HTML, comma / tab delimited, excel, maps, charts, PDFs.

Saved Filters: Many times we use the same search criteria when running a report. This filter allows you to save the specific criteria for the next time you want to run the same report.

Additional Reference:
There is a QRA available in *Customer Support > Document Center > Quick Reference Library > **Reports Selection Guide***

Search Filter



Each report view is similar when you choose the Run/Schedule link. Your *Search Filter* will be based on a variety of options.

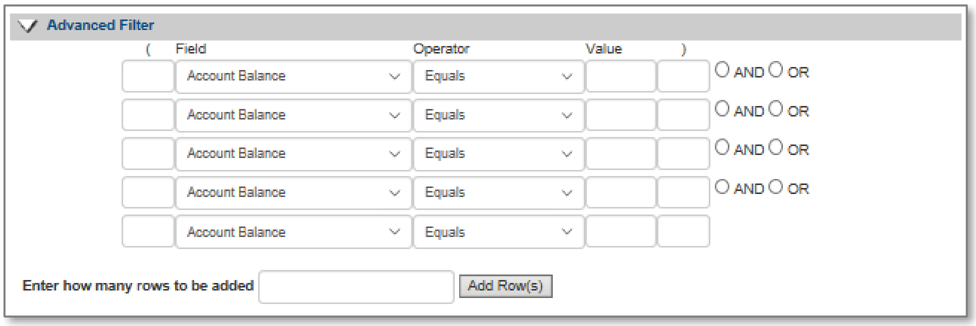
The search filter above is based on Student Activity, other search filters include: Transaction Activity Dates, Registration Dates, Class Start Dates, Category / Subcategory and Accounting Codes, etc.

Output Type

Output options are based on the report. HTML is most commonly used to view the data and available for most reports. The other options available are excel, comma or tab delimited, maps, charts, and pdfs.

Additional Reference:
There is a QRA available in *Customer Support > Document Center > Quick Reference Library > **One Click Report Creation***.

Advanced Filter

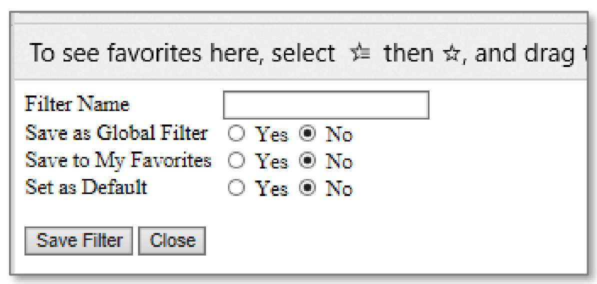


The Advanced Filter offers specific Fields, Operators, and Values to acquire specific information. For example, the standard search filters will search for a specific class, and then use advance filters to acquire a specific learner. You can create filters to narrow your search by adding second and third options then choosing the and / or feature.

The field options are based on the content of the specific report. The Operation choices will change based on the field chosen. The value is either entered or provides a choice (based on the field chosen, e.g. may only offer yes or no as a value).

Save Filter

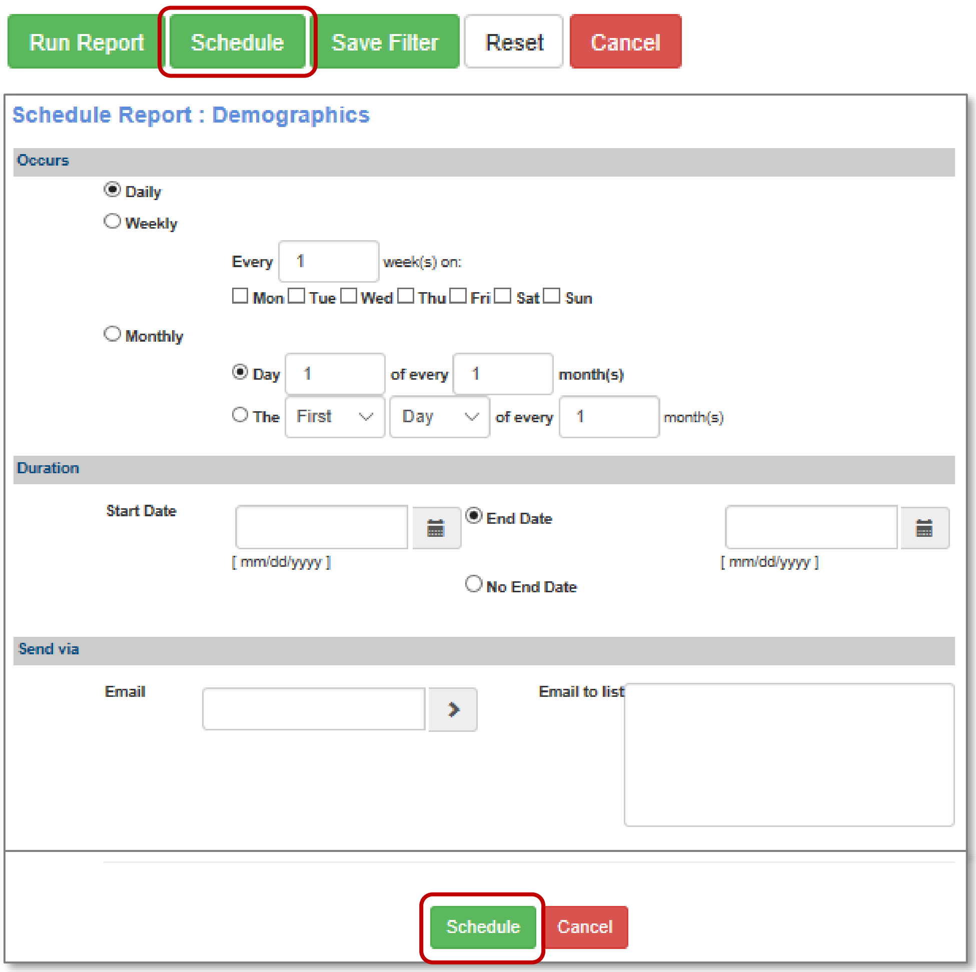
If you use an advanced filter regularly, you can name the report (and add any additional information) and choose, *Save Filter*.



<u>Ripple Effect:</u>
The advance filter drop down will include (at the bottom of the list) optional and custom fields you may have added to the classes. These fields are based on the type of report. For example, the Class Information report gathers class details, so the optional and custom fields for classes are listed.

<u>Try It!:</u>
Run any standard report from the list and choose an applicable search filter range.
Use an Advanced Filter.
Did you report produce results? If not, do you know why?

Scheduled Report



Choose the report frequency.

- Daily
- Weekly
- Monthly

Choose the duration.

- Start Date
- End Date or
- No End Date

Who will receive?

- Email Address
- Click Arrow to add to list

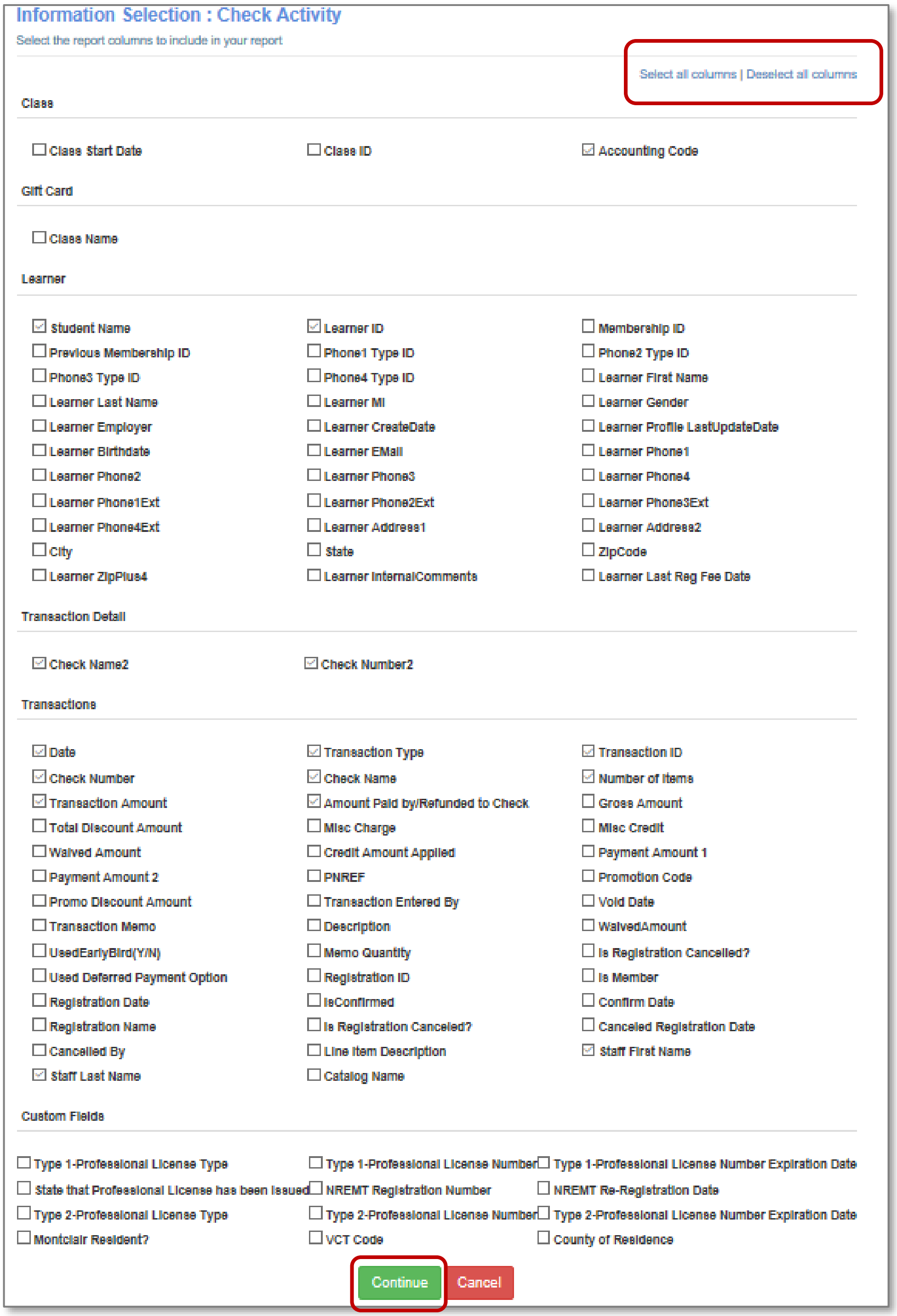
You must choose, the *includes activity on* option *when creating a scheduled report.*

<u>Additional Reference</u>:
There is a QRA available in *Customer Support > Document Center > Quick Reference Library > **Scheduled Report FTP Delivery Option***

<u>Try It!:</u>
Create a Scheduled Report. Use whichever standard report you would like.

- Set up the scheduled report to come weekly, starting right away and ending at the end of next month
- Enter your office email (you will begin seeing these reports in your mail bin later)
- Click *Schedule*

Custom Reports



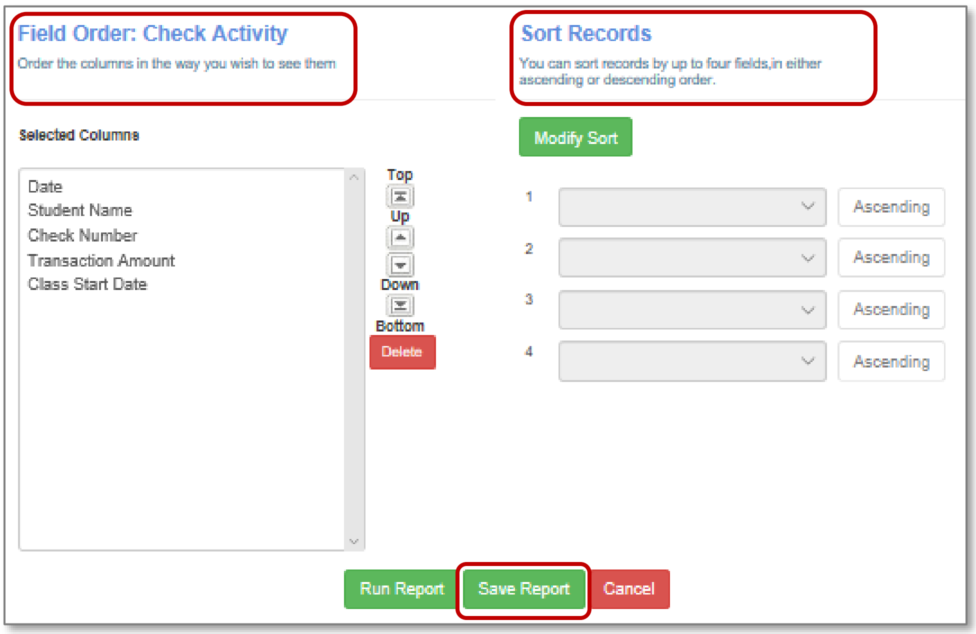
A custom report can be created from any Report that is editable.

Deselect all columns (makes it easier to choose the fields you want)

Check the fields you would like in your custom report

Once you have chosen the fields you want, click Continue.

Some reports have several field sections such as Learner, Instructor, Transaction, etc. When you enter the view, the fields checked are the fields that display in the Standard report. Optional and Custom fields display at the bottom of the information selection screen if you have added and activated the new optional or custom fields.



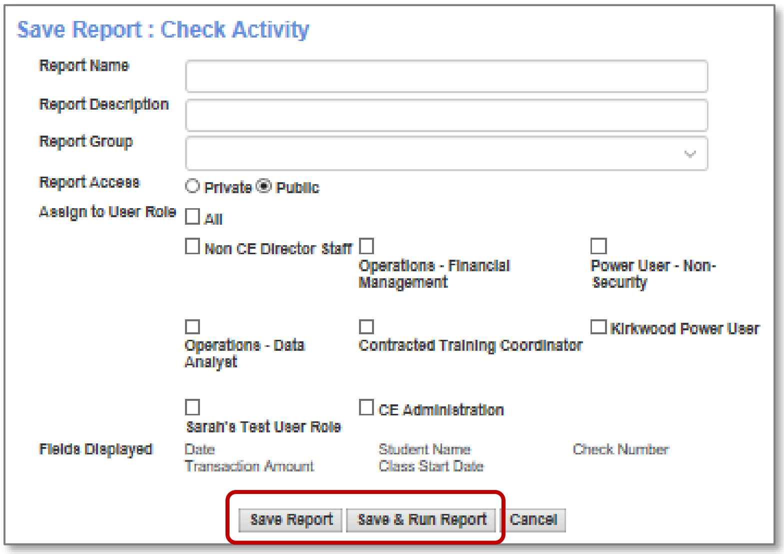
Field Order: is the <u>display order</u> from left to right when you view the report. You can move the fields up and down, bottom, and top by using the arrow buttons.

Sort Records: determines the way the report will sort. Click on ‘modify sort’ to adjust your sort fields.

When the fields are in the order you want displayed and sorted, click *Save Report* (if you click *Run Report*, it will create the report as a onetime only run).

<u>Questions:</u>
Do you have specific reports that need to display a certain way or sort according to a certain item?

____



Report Name: Enter a Report Name, this will display in the report listing
Report Description: Enter a description. This will display in the report pop up.
Report Group: Choose a Report Group. Your custom report will be located under this group.
Report Access: We recommend Public.
Assign to User Role: If there are specific user roles that should be able to access the report, choose those roles (otherwise choose *All*).
Fields Displayed: The fields displayed are the fields you chose on the previous screen.

The same search and advanced filters are available to you on this custom report as were available in the Standard Report you developed this report from

<u>Ripple Effect:</u>
The roles displayed as options are the roles created in the User Roles view of System Options.
Custom reports will display a Delete option for the report creator and Power Users.

<u>Try It!:</u>

Create a Custom Report using whichever report you want (make sure it has an edit link).

- Add 6-8 fields, create a sort, and modify if desired.
- Choose the same report group that the original standard report is assigned
- Assign the report to all users (only option if no user roles have been created)
- Save and run the report based on applicable search criteria

Advanced Registration

Cart Reservations

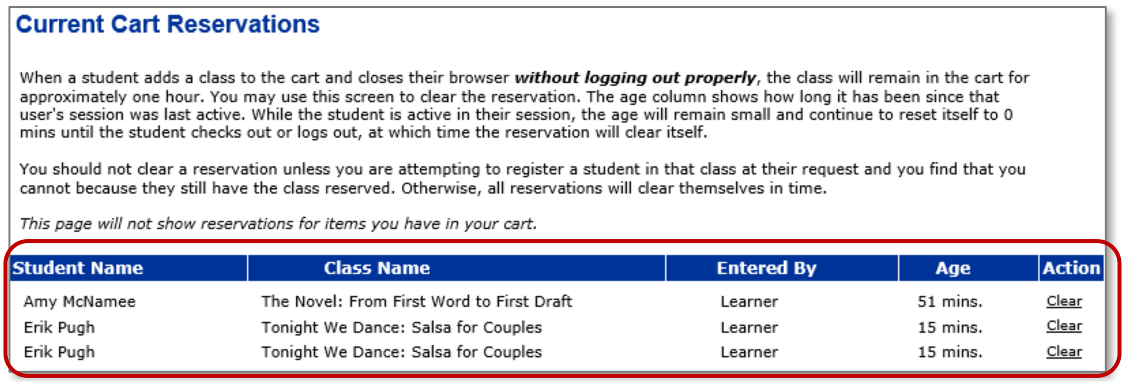
iPRO PRO CLTV STND

Objectives for Advanced Registration:

- Review Cart Reservations
- Discuss an overpayment, underpayment, and split payment registration

This section of the workbook will focus on registration menu items to ensure you have the information necessary to manage your registration needs.

*Registration > **Current Cart Reservations***



Current Cart Reservations

When a student adds a class to the cart and closes their browser ***without logging out properly***, the class will remain in the cart for approximately one hour. You may use this screen to clear the reservation. The age column shows how long it has been since that user's session was last active. While the student is active in their session, the age will remain small and continue to reset itself to 0 mins until the student checks out or logs out, at which time the reservation will clear itself.

You should not clear a reservation unless you are attempting to register a student in that class at their request and you find that you cannot because they still have the class reserved. Otherwise, all reservations will clear themselves in time.

This page will not show reservations for items you have in your cart.

Student Name	Class Name	Entered By	Age	Action
Amy McNamee	The Novel: From First Word to First Draft	Learner	51 mins.	Clear
Erik Pugh	Tonight We Dance: Salsa for Couples	Learner	15 mins.	Clear
Erik Pugh	Tonight We Dance: Salsa for Couples	Learner	15 mins.	Clear

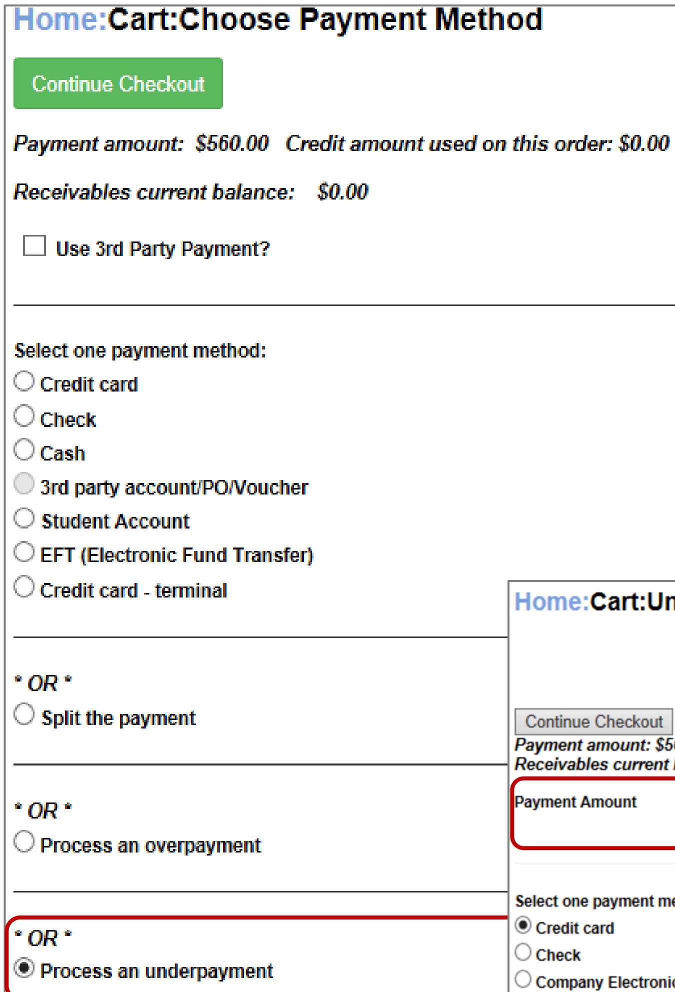
This reservation view is applicable to Student and reservations. You may need to clear this in order to register a Student that has indicated they were having difficulties.

*Registration > **Clear Shopping Cart***

When you click the *Clear Shopping Cart* submenu, anything you have in your cart is removed.

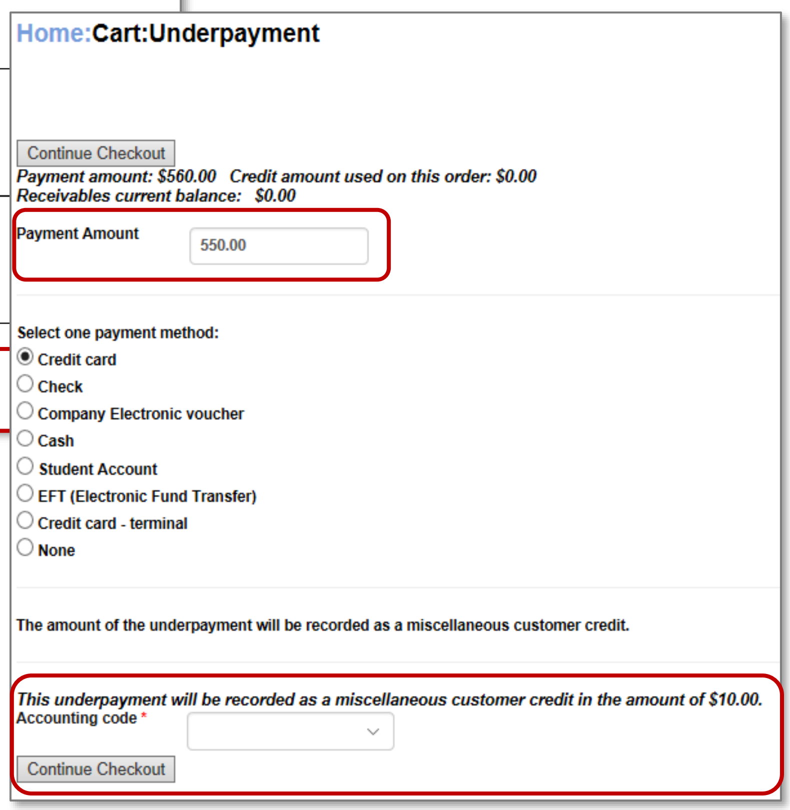
The Cart icon: Anytime you click on the cart icon, you will be placed into the cart view. If you have a transaction in progress, you can return to it. If you do not, the display will indicate there are no items in your shopping cart. The cart icon is customizable if you choose to upload your own icon.

Registration > ***Student Management*** Select *Registration*



When Staff registers a Student and has agreed to take less than the amount in the shopping cart (without ever expecting to receive the additional monies), select *Process an Underpayment*.

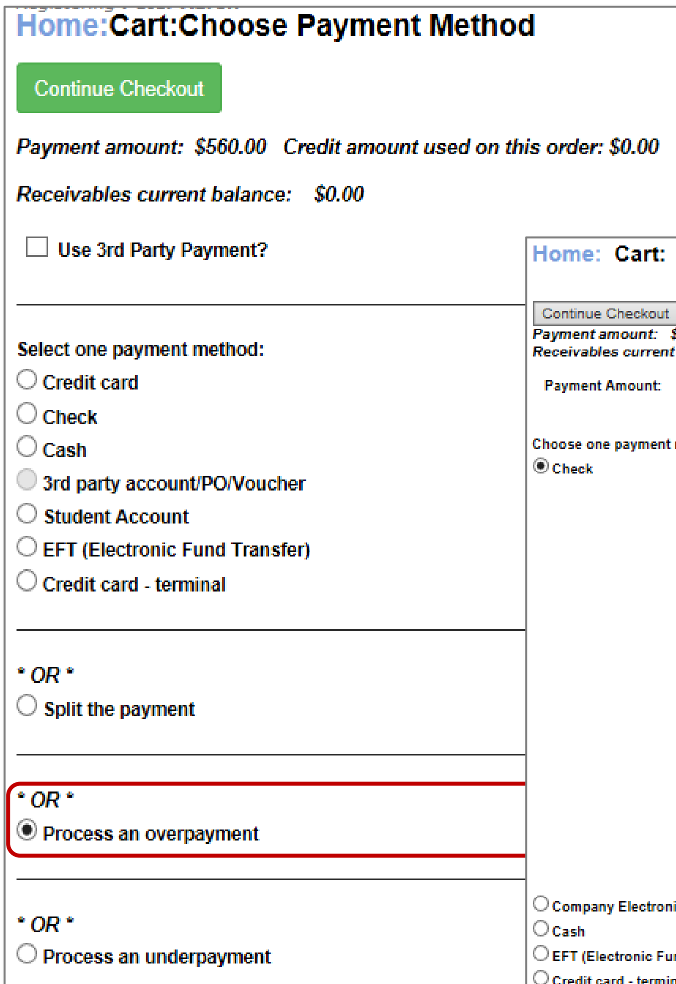
Then click *Continue Checkout*.



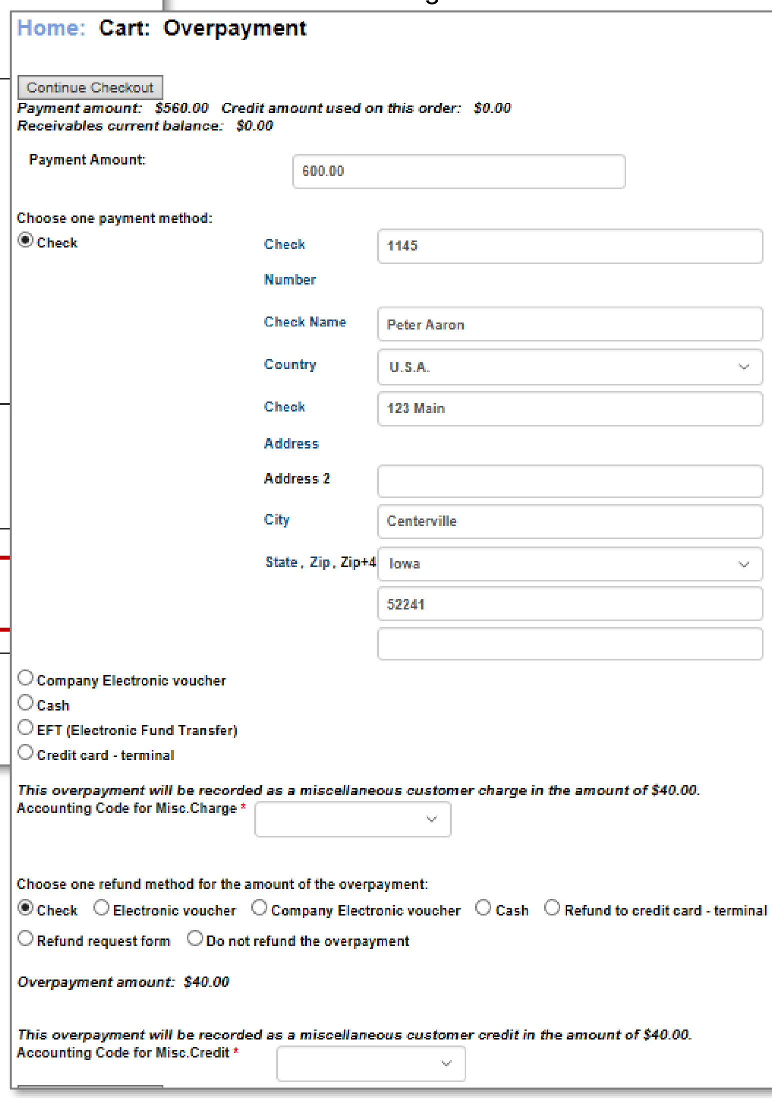
Enter the amount you are accepting.
Select the payment method
then click, *Continue Checkout.*

System Options > ***Financial Policies*** This is where your misc. credit accounting details are located.

Registration > ***Student Management*** Select *Registration*



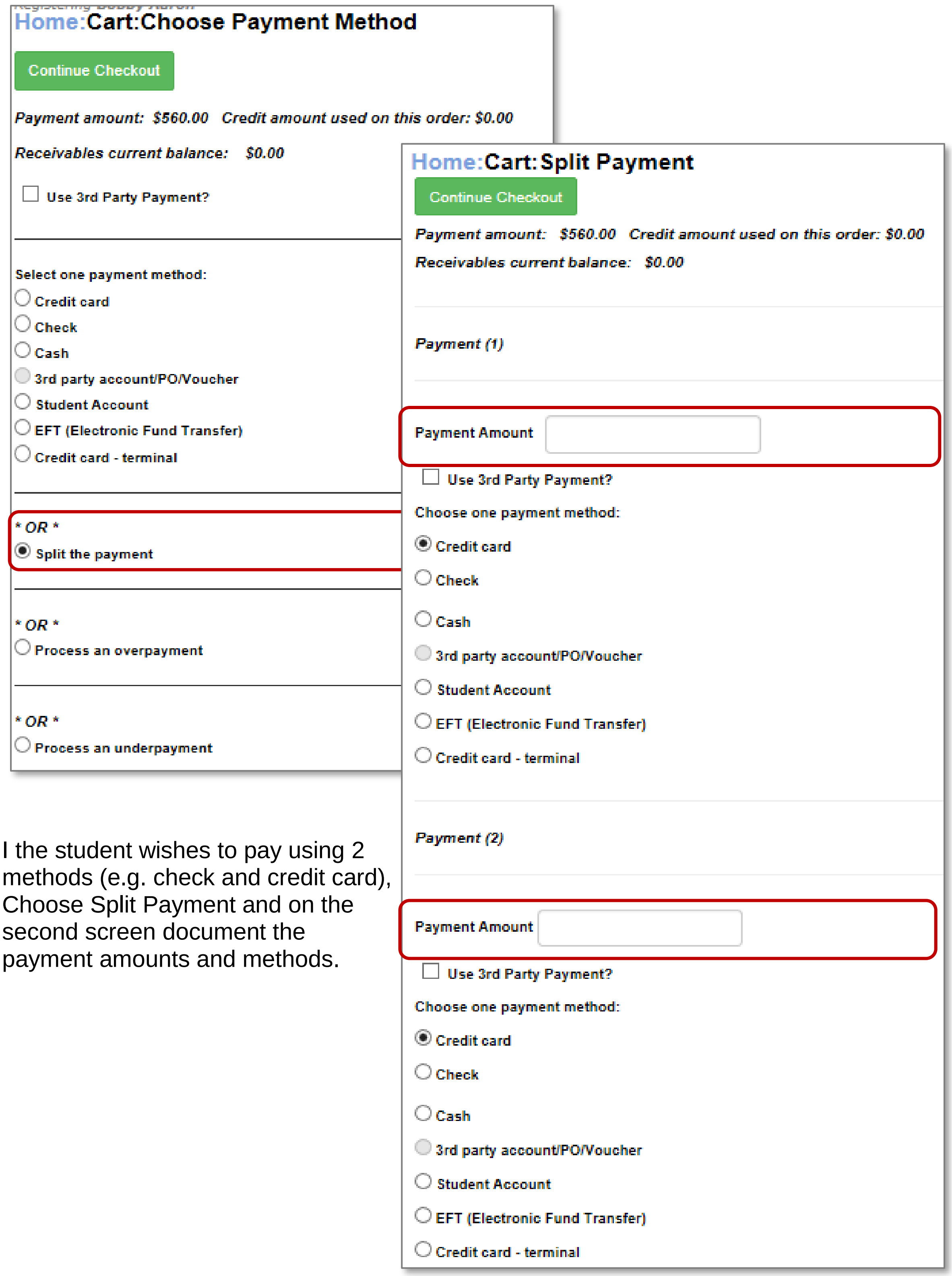
If you received an amount more than the tuition due, an overpayment option is available which will allow you to refund the overage.



Enter the amount of the payment. The system will automatically identify the overage.

Then choose how to refund the overage. If not refunded it will become a misc. credit.

Registration > ***Student Management*** Select *Registration*



I the student wishes to pay using 2 methods (e.g. check and credit card), Choose Split Payment and on the second screen document the payment amounts and methods.

Financial Management

Credit Vouchers

iPRO PRO CLTV STND

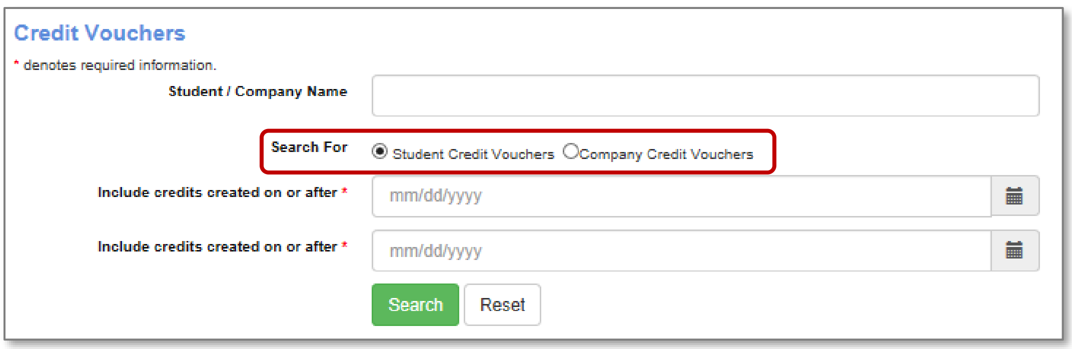
Objectives for Advanced Financial Management:

- Review the Credit Voucher view
- Discuss gateway processes

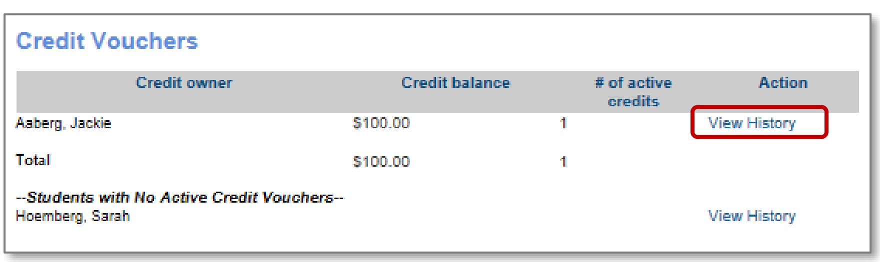
This section of the workbook will focus on the basics of what is available in the Financial Management structure of Lumens. There is also a separate Accounts Receivable workbook.

In addition, we will discuss various gateways used to process credit card transactions and the credit voucher feature available in Lumens.

*Financial Management > **Credit Vouchers***



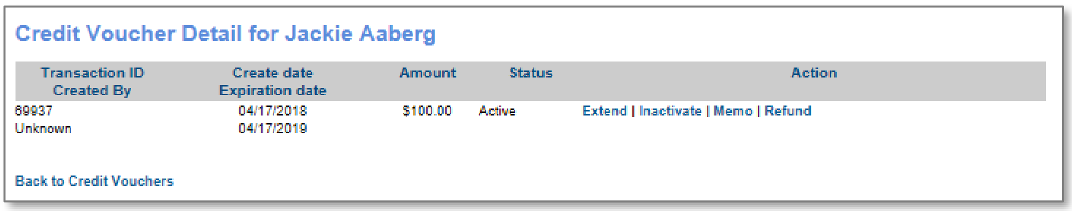
Electronic vouchers are cash-equivalent refunds Staff can issue to Students who either cancel a class registration or transfer to a class that costs the same or less than the originally registered class. When a credit voucher is issued as a refund, it can be automatically attached to the Student's profile for use on his/her next registration. Staff may also manually create an electronic voucher for a Student who may have been unhappy with a course he / she attended, a partial refund, and/or for any reason your organization determines valid.



System Options > Power User > ***General Settings****.*

The Power User view defines the number of months electronic vouchers are valid. Lumens automatically applies the amount of an electronic voucher for partial or full payment on subsequent registrations. The credit remains until it is used to pay for transactions on your Lumens site, or until it expires.

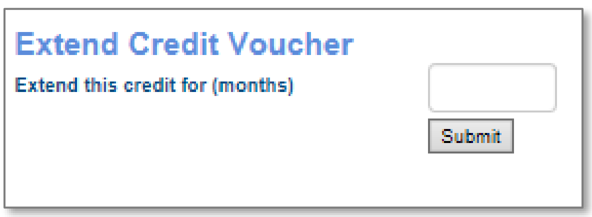
Electronic Vouchers can be extended, inactivated, refunded, and the memo viewed.



Credit Voucher Detail for Jackie Aaberg

Transaction ID Created By	Create date Expiration date	Amount	Status	Action
69937 Unknown	04/17/2018 04/17/2019	$100.00	Active	Extend | Inactivate | Memo | Refund

Back to Credit Vouchers



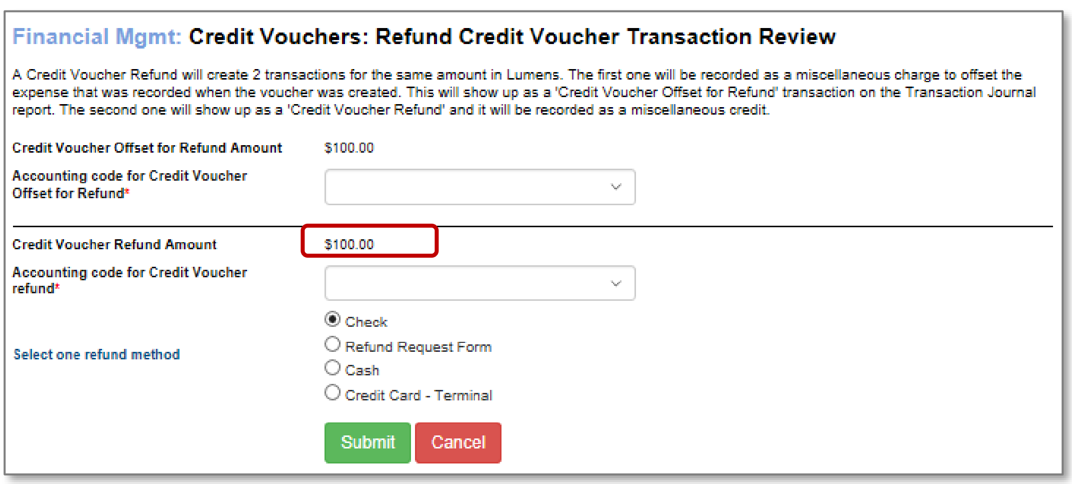
Extend Credit Voucher

Extend this credit for (months)

Submit

Click *Extend* and enter the number of months to extend.

Click *Inactivate* to immediately change the voucher status to inactive. Electronic Voucher is no longer valid.
Click Memo to view the memo that was added to the voucher when created.



Financial Mgmt: **Credit Vouchers: Refund Credit Voucher Transaction Review**

A Credit Voucher Refund will create 2 transactions for the same amount in Lumens. The first one will be recorded as a miscellaneous charge to offset the expense that was recorded when the voucher was created. This will show up as a 'Credit Voucher Offset for Refund' transaction on the Transaction Journal report. The second one will show up as a 'Credit Voucher Refund' and it will be recorded as a miscellaneous credit.

Credit Voucher Offset for Refund Amount $100.00

Accounting code for Credit Voucher Offset for Refund*

Credit Voucher Refund Amount $100.00

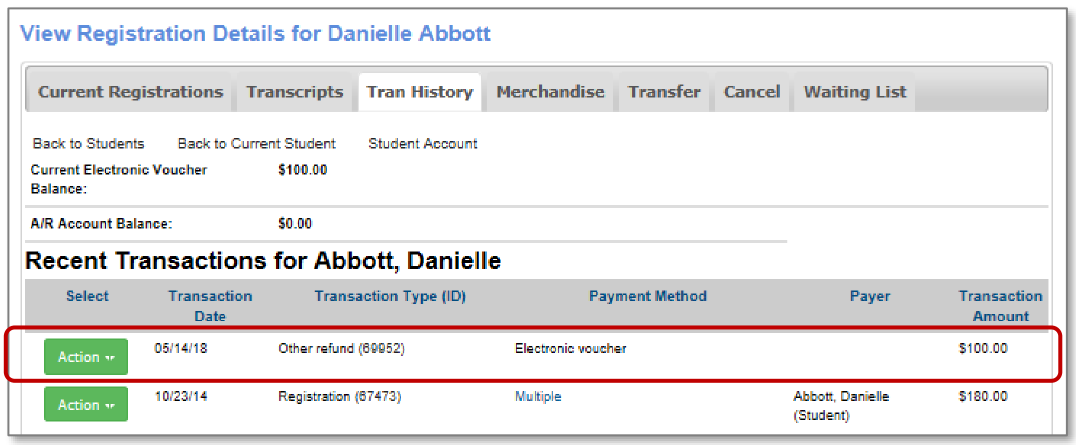
Accounting code for Credit Voucher refund*

Select one refund method
- Check
- Refund Request Form
- Cash
- Credit Card - Terminal

Submit Cancel

Click *Refund* to refund voucher to the Student and select refund method and Submit.

To create a credit voucher, go to *Students* > ***Student Management.***
Find the Student and select *Create Voucher.*

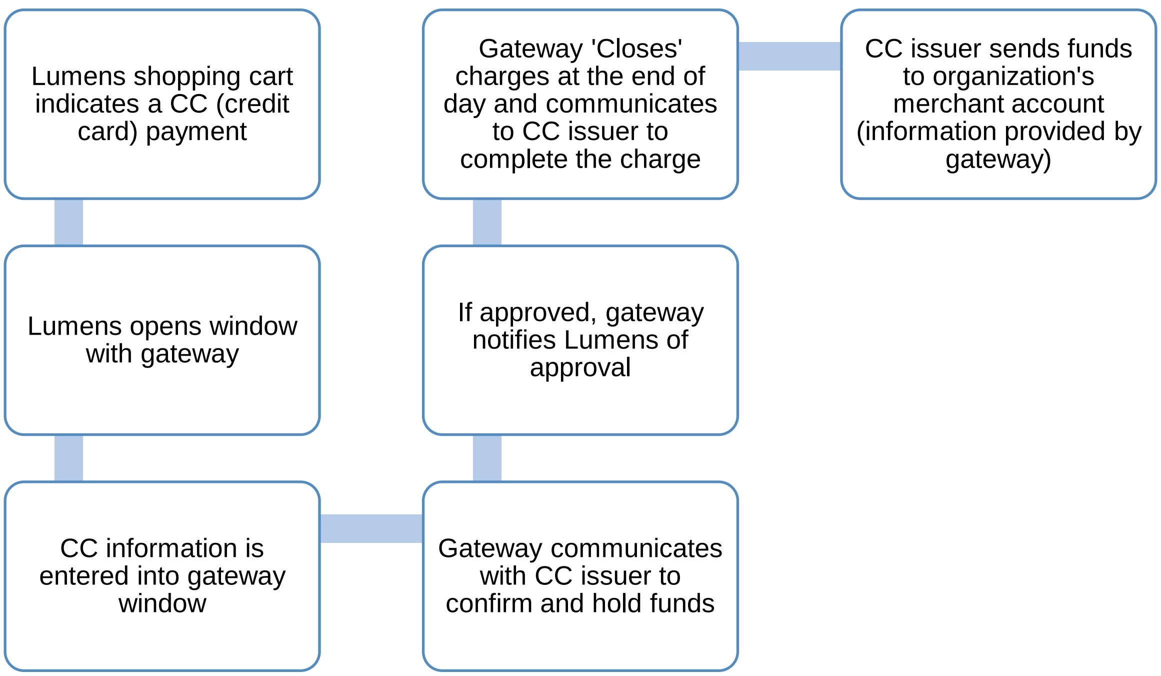


Ripple Effect:
When Staff refunds a voucher *by Check,* the Check Refunds Report provides the basic information to write refund checks. If Staff selects *Refund Request Form*, the Refund Request Report provides more detailed information in order to issue a refund by check for a cancelled or transferred registration. The report lists the various fees and accounting codes being refunded.

Questions:
Does your organization currently use credit vouchers?

Augusoft does not host your credit card processing system. To maximize security, your Lumens site is set up to automatically link to a secure credit card gateway system.

The gateway is used to communicate credit card data between Lumens, the credit card issuer, and the merchant account for your organization. The image below provides a basic outline of a gateway. (This is a general description, each gateway has very specific details for their process). Most importantly, credit card data is <u>not</u> stored in Lumens.



Knowledge Review

Advanced System Options Review

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

Objectives for Advanced System Options:

- Describe various market tracking methods
- Discuss Response Analysis options
- Define the Inactive/Deleted Items view in Lumens
- Create a Dashboard view

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

You can locate ____ under the System Options menu.

The Response Analysis tool allows a ____________________ question to be asked.

At what level does the Response Analysis collect data at: ____________________________.

Dashboards must display a minimum of 1 graph up to a maximum of ______________ graphs.

Widgets vary based on ______________________selected.

Knowledge Review

Advanced System Options Review Key

Review answer key:

You can locate ____________deleted and inactive records_________________ under the System Options menu.

The Response Analysis tool allows a _________single______ question to be asked.

At what level does the Response Analysis collect data at: _________class level______.

Dashboards must display a minimum of 1 graph up to a maximum of _________9 (nine)______ graphs:

Widgets vary based on _________category______ selected.

Additional Resources:

Customer Support > Document Center > Quick Reference Aids > ***Dashboards***

Customer Support > Document Center > Quick Reference Aids > ***Response Analysis***

Knowledge Review

Advanced Course Management Review

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

Objectives for Advanced Course Management:

- Create a Course Series in Lumens
- Discuss the evaluation tool available
- Prepare the Online Course Provider set up

To complete this review, use the *Advanced Course Management 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?).

Online Course Provider features must be activated through ________System Options > Power Users > General Settings___________________.

To acquire the configurations for the online providers, you must get the details from ____your online provider account manager OR ask your Implementation Manager to help you)______________________________.

When you create a course series, the classes are also available as standard ____single registration open enrollment___________________________________.

Course Series are created in the following order: ____Create the Series, create the group, and then attach the classes____.

The evaluation tool in Lumens provides the option of questions that are True/False, numeric scale, Yes/No, and ____comments/text____.

Knowledge Review

Advanced Course Management Review Key

Review answer key:

Online Course Provider features must be activated through ________System Options > Power Users > General Settings___________________.

To acquire the configurations for the online providers, you must get the details from ____your online provider account manager OR ask your Implementation Manager to help you_______________________________.

When you create a course series, the classes are also available as standard ____single registration open enrollment____________________________________.

Course Series are created in the following order: ____Create the Series, create the group, and then attach the classes____.

The evaluation tool in Lumens provides the option of questions that are True/False, numeric scale, Yes/No, and ____comments/text____.

Additional References:

*Customer Support > Online Training > **Course Evaluations***

*Customer Support > Online Training > **Course Series Enrollment Numbers***

*Customer Support > Online Training > **OCP Automatic Import Process / Initial Set Up (World Ed, UGotClass, ProTrain, Pearson)***

Knowledge Review

Advanced Registration Management Review

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

Objectives for Advanced Registration Management:

- Review Cart Reservations
- Discuss an overpayment, underpayment, and split payment registration

To complete this review, use the *Intermediate Registration 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. What does the 'Clear Shopping Cart' accomplish in Lumens?

- o Clears the Student shopping cart in progress
- o Clears the Staff shopping cart in progress
- o Clears a Company shopping cart in progress
- o All of the above apply

2. **T/F:** Clicking on 'clear' in the Current Cart Reservation will clear the Staff shopping cart in progress.

3. When an underpayment is completed, the system automatically creates a(n) _________.

- o Misc. credit in the financial reports
- o incorrect class sign in report
- o Both of the above
- o Neither of the above

4. When an overpayment is completed, the system automatically creates a(n) _________.

- o misc charge in the financial reports
- o incorrect class sign in report
- o Both of the above
- o Neither of the above

Knowledge Review

Advanced Registration Management Review Key

Review answer key:

Expected Results	**Related Information**
What does the 'Clear Shopping Cart' accomplish in Lumens? ○ Clears the Staff shopping cart in progress	
F: Clicking on 'clear' in the Current Cart Reservation will clear the Staff shopping cart in progress.	
When an underpayment is completed, the system automatically creates a(n) __________. ○ Misc. <u>credit</u> in the financial reports	
When an overpayment is completed, the system automatically creates a(n) __________. ○ misc <u>charge</u> in the financial reports	

Knowledge Review

Reports Review

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

Objectives for Reports:

- Discuss Reports features
- Review the available report groups
- Run a report in Lumens

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?).

As a Lumens user you can delete reports that you ____ unless you are a Power User.

Clicking on the report name will provide you details such as; Description, Report Type, ____, and Roles the can access the report.

A report can be customized if there is an __________________ option under action fields.

If reviewing the Reports Selection Guide, the standard filter criteria for reports are, by ___________________________ date, by _________________________/___________________________ date, and by _______________________.

Knowledge Review

Reports Review Key

Review answer key:

As a Lumens user you can delete reports that you
____________own________________________ unless you are a Power User.

Clicking on the report name will provide you details such as; Description, Report Type,
_____last run date/time________________, and Roles the can access the report.

A report can be customized if there is an ____edit_______ option under action fields.

If reviewing the Reports Selection Guide, the standard filter criteria for reports are, by
________class_____________ date, by ____registration_______/____transaction_________
date, and by _____term__________________.

Additional Reference:
*Customer Support Menu > Document Center > General Support Documents > **Reports Selection Guide***