

Augu'soft®

Lumens PRO Level 3 Program

Lumens Advanced



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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:

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 will be downstream or dependent on the setup.



Try it! Is a suggested place in your training to stop and practice what you are learning.



Additional Reference
indicates a process not formally addressed in the workbook. Additional resources will be indicated, such as a QRA (Quick Reference Aid or resource indicated, outside this training).



Knowledge Check is at the end of a section, designed to review new content.

Advanced System Options

Tracking Settings



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**

| | |
|-----------------------------|---|
| Google Analytics Settings | + |
| Google Tag Manager Settings | + |
| Conversion Tracking | + |
| Genoo Tracking Settings | + |
| Hubspot Tracking Settings | + |
| AddThis Tracking Settings | + |

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.

Question:

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



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:

Registration Date on or Before:

Includes Registrations On:

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

Term:

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*.



Advanced System Options

Inactive / Delete



System Options > *Inactive / Delete*

Audit Search for Inactivated/Deleted Items

From: mm/dd/yyyy

To: mm/dd/yyyy

Report Type: Student Profile

Report target:

- View Inactivated Items
- View Deleted Items
- View Both Inactivated and Deleted Items

Submit

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.

| Audit Details for Student Profile | |
|-----------------------------------|------------------------|
| Name / ID | Kinney, Robert / 47237 |
| Change Type | update |
| Change Date | 07/11/2011 10:34 |
| Change By | Shelton, Michael |
| Change Reason | duplicate record |
| ----- | |
| Change | Status |
| Old Status | Active |
| New Status | Deleted |

Advanced System Options

Dashboard Admin



System Options > Dashboard Admin

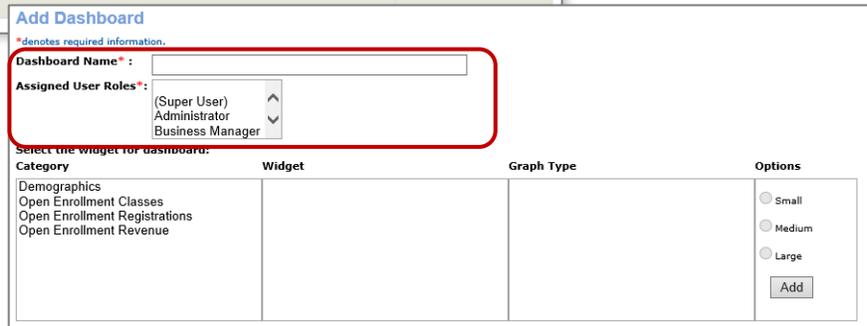
The Dashboard feature gives the opportunity to create snapshots of different areas of your program's business through graphical representation of data. Categories for data are; Open Enrollment Revenue, Contract Training Revenue, All Revenue (OE and CT), Registrations, Demographics, and Classes. Staff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



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

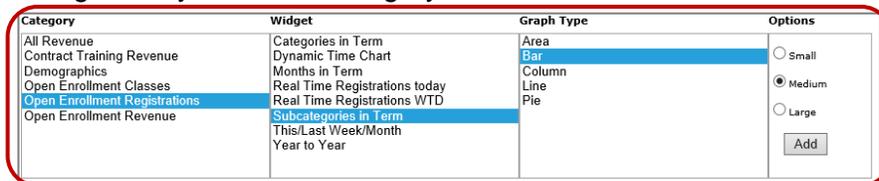
Dashboard Name: enter descriptive label; i.e., *Real Time Registration*.

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



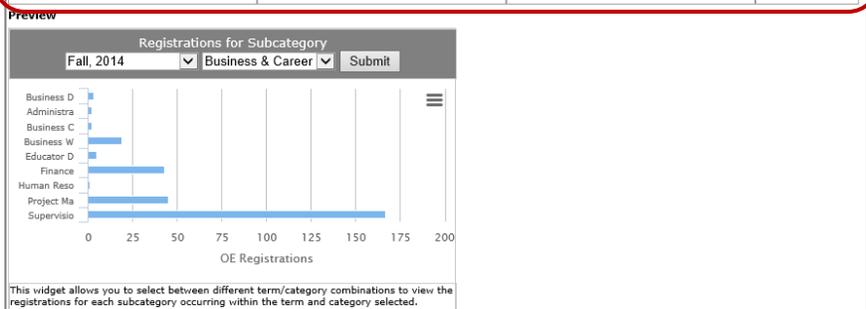
If you are not using User Roles there is less flexibility with access control.

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.

Advanced System Options

Dashboard Admin – Continued



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

Add Dashboard

Required information:

Dashboard Name*: Real Time Registrations

Assigned User Roles*: (Super User), Administrator, Business Manager

Select the widget for dashboard:

| Category | Widget | Graph Type | Options |
|-------------------------------|--------|------------|------------------------------------|
| All Revenue | | | <input type="radio"/> Small |
| Contract Training Revenue | | | <input type="radio"/> Medium |
| Demographics | | | <input type="radio"/> Large |
| Open Enrollment Classes | | | <input type="button" value="Add"/> |
| Open Enrollment Registrations | | | |
| Open Enrollment Revenue | | | |

Drag and drop to order your selected widgets. To delete, hover over the widget and click the red X.

Real Time Registrations (Gauge: Today 24, Total WTD 110)

Registrations (Line Chart: Jul 16, 2014 to Oct 14, 2014)

Registrations This Week (Line Chart: Average vs Actuals)

Registrations by Month Fall 2014 (Bar Chart: Initial vs Final)

Year-to-Year Financials (Bar Chart: 2009-2015)

Submit Cancel

Ripple Effect:

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



Advanced Course Management

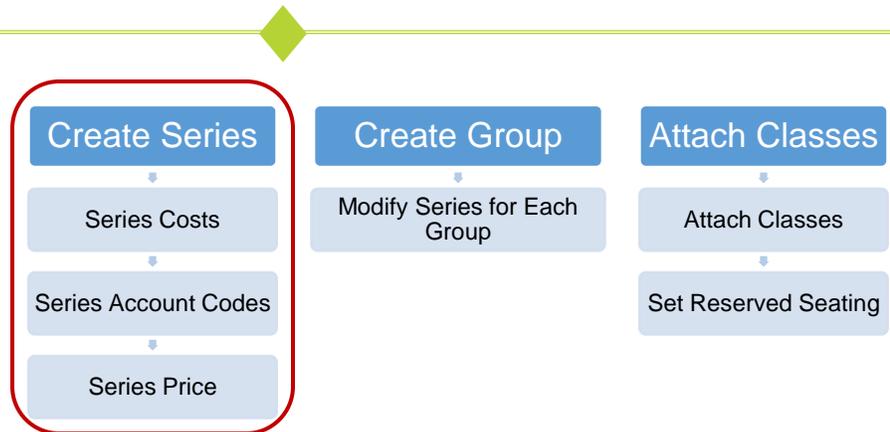
Course Series



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**

Course Series

Series code

Series Status

Search for Course using Series Name

To restore a complete Course Series list, clear the search field; then press search.
You cannot delete series that are in use.

[Add 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.

Advanced Course Management

Course Series - Continued



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 *

Accounting Code for Course Series Cost

Course Series Program Fee

Course Series Materials Fee

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 | <input type="text" value="0.00"/> |
| | | Catering | <input type="text" value="0.00"/> |
| Instructor Cost | | Class Prep | <input type="text" value="0.00"/> |
| | | Curr. Dev. | <input type="text" value="0.00"/> |
| Marketing | | Marketing Costs | <input type="text" value="0.00"/> |
| | | Other | <input type="text" value="0.00"/> |
| | | Collateral Pieces | <input type="text" value="0.00"/> |
| Material | | Organization's Material Cost | <input type="text" value="0.00"/> |
| Overhead | | Overhead | <input type="text" value="0.00"/> |

Contact Phone

Allow Info Request Yes No

Info Request Email

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 allow viewers to request more information?

Advanced Course Management

Course Series - Continued



Displays in * All Catalogs Catalogs assigned to Series Classes

Category Name *

SubCategory Name *

Alternate SubCategories(optional for display only)
Business & Professional Development : Business Careers
Business & Professional Development :
Coaching/Athletics
Business & Professional Development : Cosmetology
Business & Professional Development : Entrepreneurship
Business & Professional Development : Professional Development

Add Course series Description *

T2202A Eligible ? Yes No

Auto Increment Reserved Seats * Yes No

Refund Policy *

Add Listing Icon
Recommend approx. 15x15 png file format, <50KB

Listing Icon Alt Descr.

Requires Release Form? * Yes No

Release Form Names *

Display Course Series to Public Yes No

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.

Course Series

Series code

Series Status

Search for Course using Series Name

To restore a complete Course Series list, clear the search field; then press search.
You cannot delete series that are in use.
[Add Course Series](#)

Showing records 1 through 12 of 46.

| Select | Series Code | Series Name | Status | Series Fee |
|---------------------------------------|--------------|------------------|--------|------------|
| <input type="button" value="Action"/> | ADV MS Excel | Advance MS Excel | Active | \$209.00 |

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.

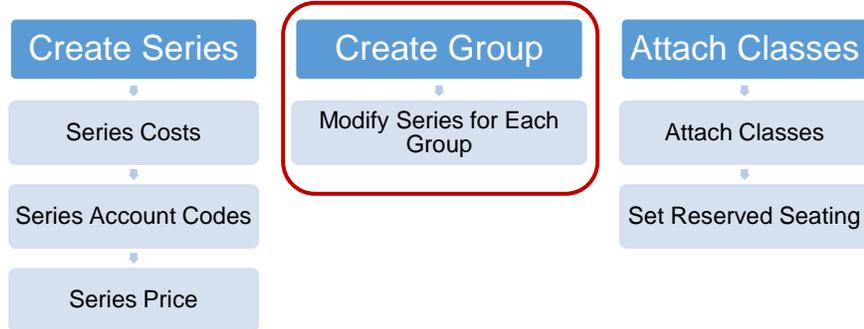


Advanced Course Management

Course Series - Continued



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



| Select | Series Code | Series Name | Status | Series Fee |
|--------|-------------|-------------|--------|------------|
| Action | Excel | Excel | Active | \$209.00 |

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

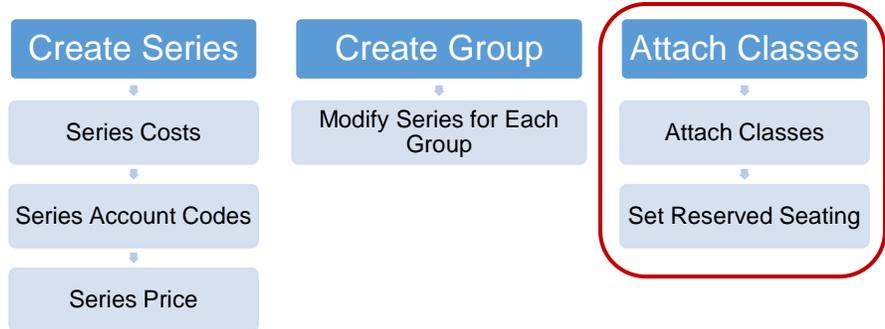
Click, *Add New Group*.

| Select | Term | Class Name (ID) | Status | Total Seats/ Reserved | Class Fee |
|---|------|-----------------|--------|-----------------------|-----------|
| There are no active groups for this series. | | | | | |

The Series Group information flows from the base Series and is editable.

Advanced Course Management

Course Series - Continued



Click *Action* then *Add Class to Group*

Advanced MS Excel : Course Series Detail

Add New Group

| Select | Edit | (ID) | Status | Total Seats/ Reserved | Class Fee |
|--------|-----------------------|------|--------|-----------------------|-----------|
| Action | Add Class to Group 1 | | | | |
| | Remove Series Group 1 | | | | |

There are no classes

Submit Cancel

Back to Course Series List

Advanced MS Excel, Series Group 1

Search for classes to add

Search for Class using the search fields:

Class name

Class ID

Course Number

Term

Class Start Date on or After [m/d/yyyy]

Class Start Date on or Before [m/d/yyyy]

Category

Subcategory

Course Type

Class Description keyword

Submit Reset Cancel

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

Advanced Course Management

Course Series - Continued



Add Class to Advanced MS Excel, Series Group 1
Search for Class using the search fields:

Class name: Class ID:

Course Number: Term:

Class Start Date on or After: Class Start Date on or Before:

Category: Subcategory:

Course Type:

Class Description keyword:

| Start Date/Time | Class Name (ID) | Category/Subcategory | Term | Add to Series Group? |
|--------------------|------------------|---|---------------|--------------------------|
| 01/01/2018 9:00 AM | #1 Excel (27280) | Business & Professional Development Professional Development | Calendar 2018 | <input type="checkbox"/> |
| 02/26/2018 9:00 AM | #1 Excel (27583) | Business & Professional Development Professional Development | Calendar 2018 | <input type="checkbox"/> |
| 04/16/2018 9:00 AM | #1 Excel (27584) | Business & Professional Development Professional Development | Calendar 2018 | <input type="checkbox"/> |

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.)

Advanced MS Excel : Course Series Detail

Add New Group

| Select | Term | Class Name (ID) | Status | Total Seats/ Reserved | Class Fee |
|---------------------------------------|-------------------------------------|------------------|--------|--|-----------|
| <input type="button" value="Action"/> | Series Group 1 Series fee: \$209.00 | | | | |
| <input type="checkbox"/> | Calendar 2018 | #1 Excel (27280) | Active | 100/ <input type="text" value="0"/> | \$575.00 |
| <input type="checkbox"/> | Calendar 2018 | #1 Excel (27583) | Active | 100/ <input type="text" value="0"/> | \$575.00 |
| <input type="checkbox"/> | Calendar 2018 | #1 Excel (27584) | Active | 100/ <input type="text" value="0"/> | \$575.00 |

Reserved Seats for Series Group 1:

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.

Series : Advanced MS Excel

-Edit

Start Date : 01/01/18 Tuition: \$209.00 Materials Cost: \$0.00

Description : test

[VIEW SERIES INFORMATION »](#)
[ADD TO CART »](#)

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*



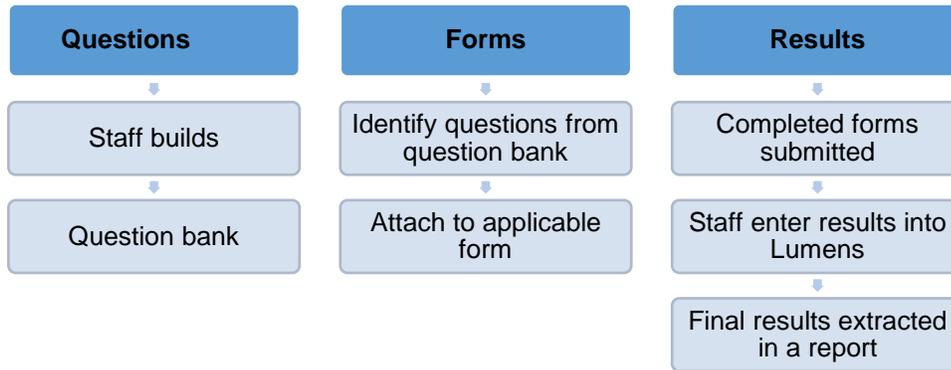
Advanced Course Management

Evaluations



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***



Retention Activity:

Do you think you might use Evaluations? If so, think about what questions you want to add to the bank.



Advanced Course Management

Online Course Management



Course Mgmt > **Online Course Mgmt**

Click Action then Configure

| Action | Provider Name | Last Imported | Status |
|-------------------|-----------------------------|--------------------|--------|
| Action ▾ | ProTrain | 1/31/2018 03:22 PM | Active |
| Configure | GotClass | 2/1/2018 01:26 PM | Active |
| Manage Categories | Pearson Workforce Education | 1/31/2018 03:30 PM | Active |
| Import | World Education | 1/31/2018 03:12 PM | Active |
| Edit Courses | | | |

Course Providers: Edit Provider: ProTrain
* denotes required information.

Default Import Catalog *

Customer/Unit Code *

Requires Registration Fee? * Yes No

Display Graphic * Yes No

Alternate Graphic
Recommend approx. 15x15 png file format, <50KB

Contact Email *
OCP related updates will be sent to this email.

Default Refund Policy *

Default Acct Code for Class Cost *

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.

Information:

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.

Ripple Effect:

You must activate each individual Online Provider in *Power User* > **General Settings** in order for the option to appear.



Advanced Course Management

Online Course Management – Continued



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.

Reports Home

Search for reports by the field below.
For a complete listing, clear the search fields then press search.

Name Type Group

| | Type | Action |
|-----------------------|------|--------|
| ▶ my favorites | Type | Action |
| ▶ my recent reports | Type | Action |
| ▶ accounts receivable | Type | Action |
| ▶ catalog mgmt | Type | Action |
| ▶ certificates | Type | Action |
| ▶ class mgmt | Type | Action |
| ▶ contract training | Type | Action |
| ▶ daily financial | Type | Action |
| ▶ financial analysis | Type | Action |
| ▶ LERN Analysis | Type | Action |
| ▶ marketing | Type | Action |

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

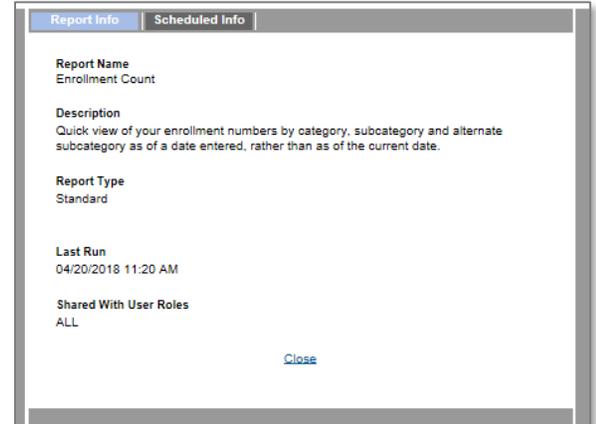
Reports

Report Groups - Continued



Report Groups

| ▼ my favorites | Type | Action |
|------------------------------|--------|--------|
| Demographics | Custom | |
| ▶ my recent reports | Type | Action |
| ▶ accounts receivable | Type | Action |
| ▶ catalog mgmt | Type | Action |
| ▶ class mgmt | Type | Action |
| ▶ daily financial | Type | Action |
| ▶ financial analysis | Type | Action |
| ▶ LERN Analysis | Type | Action |
| ▶ marketing | Type | Action |



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



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.

Try It!:

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)



Questions:

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



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



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.

Try It!

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



Question:

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)

Reports

Report Features



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

Report Filter: Demographics

NOTE: Data for this report is available through yesterday. It does not include data from today.

No Saved Filters

Search Filter

Student Activity Date on or After: m/d/yyyy

Student Activity Date on or Before: m/d/yyyy

Profile Create Date on or After: m/d/yyyy

Profile Create Date on or Before: m/d/yyyy

Includes Activity On: [Dropdown]

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

Term: [Dropdown]

Activity Types: Profile Created, Profile Modified, Student Registrations, All

Student Type: Learner, Household, Slim Student

Account Balance is: ---Select---

[Dollar Amount]

Advanced Filter

| Field | Operator | Value | |
|-----------------|----------|-------|--|
| Account Balance | Equals | | <input type="radio"/> AND <input type="radio"/> OR |
| Account Balance | Equals | | <input type="radio"/> AND <input type="radio"/> OR |
| Account Balance | Equals | | <input type="radio"/> AND <input type="radio"/> OR |
| Account Balance | Equals | | <input type="radio"/> AND <input type="radio"/> OR |
| Account Balance | Equals | | <input type="radio"/> AND <input type="radio"/> OR |

Enter how many rows to be added: [Input] Add Row(s)

Output Type

View Report As: HTML

Suppress Criteria on Report

Don't Print Report Graphic

Run Report Schedule Save Filter Reset Cancel

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*



Reports

Report Features: Filters and Output



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***.



Reports

Report Features: Filters & Output – Continued



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 advanced 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*.

Ripple Effect:

The advanced 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.



Try It!:

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?



Reports

Report Features: Scheduled Reports



Scheduled Report



Schedule Report : Demographics

Occurs

Daily
 Weekly
Every week(s) on:
 Mon Tue Wed Thu Fri Sat Sun

Monthly
 Day of every month(s)
 The Day of every month(s)

Duration

Start Date [mm/dd/yyyy] End Date [mm/dd/yyyy]
 No End Date

Send via

Email > Email to list

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.

Additional Reference:

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



Try It!:

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*



Reports

Report Features: Custom Reports



Custom Reports

[Run / Schedule](#) | [Edit](#) | [Add to my favorites](#) | [Help](#)

Information Selection : Check Activity
Select the report columns to include in your report

[Select all columns](#) | [Deselect all columns](#)

Class

Class Start Date Class ID Accounting Code

Gift Card

Class Name

Learner

Student Name Learner ID Membership ID
 Previous Membership ID Phone1 Type ID Phone2 Type ID
 Phone3 Type ID Phone4 Type ID Learner First Name
 Learner Last Name Learner MI Learner Gender
 Learner Employer Learner CreateDate Learner Profile LastUpdateDate
 Learner Birthdate Learner EMail Learner Phone1
 Learner Phone2 Learner Phone3 Learner Phone4
 Learner Phone1Ext Learner Phone2Ext Learner Phone3Ext
 Learner Phone4Ext Learner Address1 Learner Address2
 City State ZipCode
 Learner ZipPlus4 Learner InternalComments Learner Last Reg Fee Date

Transaction Detail

Check Name2 Check Number2

Transactions

Date Transaction Type Transaction ID
 Check Number Check Name Number of Items
 Transaction Amount Amount Paid by/Refunded to Check Gross Amount
 Total Discount Amount Misc Charge Misc Credit
 Waived Amount Credit Amount Applied Payment Amount 1
 Payment Amount 2 PNREF Promotion Code
 Promo Discount Amount Transaction Entered By Void Date
 Transaction Memo Description WaivedAmount
 UsedEarlyBird(Y/N) Memo Quantity Is Registration Cancelled?
 Used Deferred Payment Option Registration ID Is Member
 Registration Date IsConfirmed Confirm Date
 Registration Name Is Registration Canceled? Canceled Registration Date
 Cancelled By Line Item Description Staff First Name
 Staff Last Name Catalog Name

Custom Fields

Type 1-Professional License Type Type 1-Professional License Number Type 1-Professional License Number Expiration Date
 State that Professional License has been issued NREMT Registration Number NREMT Re-Registration Date
 Type 2-Professional License Type Type 2-Professional License Number Type 2-Professional License Number Expiration Date
 Montclair Resident? VCT Code County of Residence

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.

Reports

Report Features: Custom Reports – Continued



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 display order 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).

Questions:

Do you have specific reports that need to display a certain way or sort according to a certain item?



Reports

Report Features: Custom Reports – Continued



Save Report : Check Activity

Report Name

Report Description

Report Group

Report Access Private Public

Assign to User Role All

Non CE Director Staff Operations - Financial Management Power User - Non-Security

Operations - Data Analyst Contracted Training Coordinator Kirkwood Power User

Sarah's Test User Role CE Administration

Fields Displayed
Date Transaction Amount Student Name Class Start Date Check Number

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

Ripple Effect:

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.



Try It!:

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



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.

Advanced Registration

Registration Underpayment



Registration > **Student Management** Select Registration

Home: Cart: Choose Payment Method

[Continue Checkout](#)

Payment amount: \$560.00 Credit amount used on this order: \$0.00

Receivables current balance: \$0.00

Use 3rd Party Payment?

Select one payment method:

- Credit card
- Check
- Cash
- 3rd party account/PO/Voucher
- Student Account
- EFT (Electronic Fund Transfer)
- Credit card - terminal

* OR *

Split the payment

* OR *

Process an overpayment

* OR *

Process an underpayment

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*.

Home: Cart: Underpayment

[Continue Checkout](#)

Payment amount: \$560.00 Credit amount used on this order: \$0.00

Receivables current balance: \$0.00

Payment Amount

Select one payment method:

- Credit card
- Check
- Company Electronic voucher
- Cash
- Student Account
- EFT (Electronic Fund Transfer)
- Credit card - terminal
- None

The amount of the underpayment will be recorded as a miscellaneous customer credit.

This underpayment will be recorded as a miscellaneous customer credit in the amount of \$10.00.

Accounting code *

[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.

Advanced Registration

Registration Overpayment



Registration > Student Management Select Registration

Home: Cart: Choose Payment Method

[Continue Checkout](#)

Payment amount: \$560.00 Credit amount used on this order: \$0.00
Receivables current balance: \$0.00

Use 3rd Party Payment?

Select one payment method:

- Credit card
- Check
- Cash
- 3rd party account/PO/Voucher
- Student Account
- EFT (Electronic Fund Transfer)
- Credit card - terminal

* OR *

Split the payment

* OR *

Process an overpayment

* OR *

Process an underpayment

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

Home: Cart: Overpayment

[Continue Checkout](#)

Payment amount: \$560.00 Credit amount used on this order: \$0.00
Receivables current balance: \$0.00

Payment Amount:

Choose one payment method:

Check

Check Number:

Check Name:

Country:

Check Address:

Address 2:

City:

State, Zip, Zip+4:

Company Electronic voucher
 Cash
 EFT (Electronic Fund Transfer)
 Credit card - terminal

This overpayment will be recorded as a miscellaneous customer charge in the amount of \$40.00.
Accounting Code for Misc.Charge *

Choose one refund method for the amount of the overpayment:

Check Electronic voucher Company Electronic voucher Cash Refund to credit card - terminal
 Refund request form Do not refund the overpayment

Overpayment amount: \$40.00

This overpayment will be recorded as a miscellaneous customer credit in the amount of \$40.00.
Accounting Code for Misc.Credit *

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.

Advanced Registration

Registration Split Payment



Registration > **Student Management** Select Registration

Home: Cart: Choose Payment Method

[Continue Checkout](#)

Payment amount: \$560.00 Credit amount used on this order: \$0.00

Receivables current balance: \$0.00

Use 3rd Party Payment?

Select one payment method:

- Credit card
- Check
- Cash
- 3rd party account/PO/Voucher
- Student Account
- EFT (Electronic Fund Transfer)
- Credit card - terminal

*** OR ***

Split the payment

*** OR ***

Process an overpayment

*** OR ***

Process an underpayment

Home: Cart: Split Payment

[Continue Checkout](#)

Payment amount: \$560.00 Credit amount used on this order: \$0.00

Receivables current balance: \$0.00

Payment (1)

Payment Amount

Use 3rd Party Payment?

Choose one payment method:

- Credit card
- Check
- Cash
- 3rd party account/PO/Voucher
- Student Account
- EFT (Electronic Fund Transfer)
- Credit card - terminal

Payment (2)

Payment Amount

Use 3rd Party Payment?

Choose one payment method:

- Credit card
- Check
- Cash
- 3rd party account/PO/Voucher
- Student Account
- EFT (Electronic Fund Transfer)
- Credit card - terminal

If 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



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

Credit Vouchers
* denotes required information.

Student / Company Name

Search For Student Credit Vouchers Company Credit Vouchers

Include credits created on or after *

Include credits created on or after *

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.

Credit Vouchers

| Credit owner | Credit balance | # of active credits | Action |
|---|----------------|---------------------|------------------------------|
| Aaberg, Jackie | \$100.00 | 1 | View History |
| Total | \$100.00 | 1 | |
| --Students with No Active Credit Vouchers-- | | | |
| Hoemberg, Sarah | | | View History |

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 |
|------------------------------|--------------------------------|----------|--------|---|
| 89937 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)

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

Accounting code for Credit Voucher refund*

Select one refund method

Check
 Refund Request Form
 Cash
 Credit Card - Terminal

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*.

Create Credit Voucher for Danielle Abbott

This student does not currently have any active credits.

Blue type denotes required information.

Create credit for this amount

Misc Credit Accounting Code:*

Memo

Enter amount must be between \$.01 and \$5000.
Format: nnn.nn

View Registration Details for Danielle Abbott

Current Registrations
Transcripts
Tran History
Merchandise
Transfer
Cancel
Waiting List

Back to Students Back to Current Student Student Account

Current Electronic Voucher \$100.00

Balance:

A/R Account Balance: \$0.00

Recent Transactions for Abbott, Danielle

| Select | Transaction Date | Transaction Type (ID) | Payment Method | Payer | Transaction Amount |
|---------------------------------------|------------------|-----------------------|--------------------|----------------------------|--------------------|
| <input type="button" value="Action"/> | 05/14/18 | Other refund (89952) | Electronic voucher | | \$100.00 |
| <input type="button" value="Action"/> | 10/23/14 | Registration (87473) | Multiple | Abbott, Danielle (Student) | \$180.00 |

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?



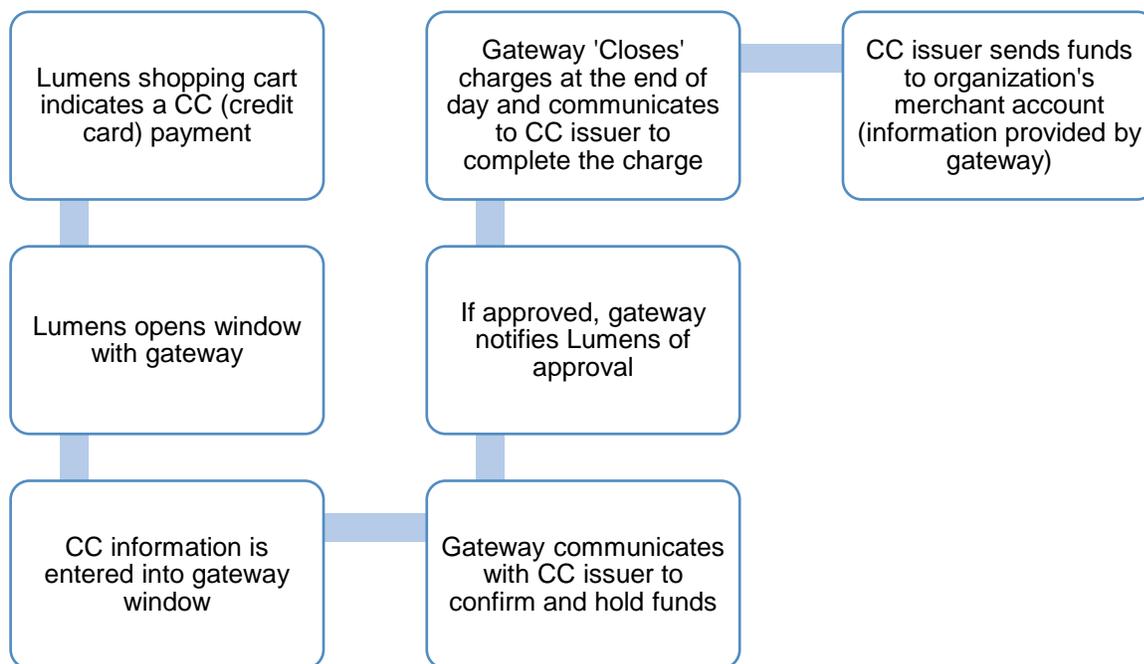
Financial Management

Gateways



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 not 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?

- Clears the Student shopping cart in progress
- Clears the Staff shopping cart in progress
- Clears a Company shopping cart in progress
- 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) _____.

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

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

- misc charge in the financial reports
- incorrect class sign in report
- Both of the above
- 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? <ul style="list-style-type: none">○ 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) _____. <ul style="list-style-type: none">○ Misc. <u>credit</u> in the financial reports | |
| When an overpayment is completed, the system automatically creates a(n) _____. <ul style="list-style-type: none">○ 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***

