

Augu'soft[®]

Lumens Power User

System Set Up and Modification Options



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Power User Program Overview

Introduction

Welcome to Augusoft Lumens!

Let's take a moment to discuss the format of your workbook:

This workbook contains screen captures of the Lumens software, which can be used as a reference tool during the learning process. Lumens has three web templates you can choose from to build your site, so you may see slight variances between the screen captures, however it's important to note that the screen navigation paths are the same.

Each topic and subtopic is sorted based on the menu and submenus in Lumens. This workbook was designed to make it easy for you to follow along with trainings and to reference as you build your site.

The Lumens Power User Workbook will ensure you have the knowledge needed to identify the system settings, features, and functionality assigned to those with Power User access.

The Lumens Power User Workbook will include training on the following topics:

- System Options – including the Power User settings
- Registration and Course Management
- Reports

Power Users are individuals who have a significant amount of access to your Lumens site, and who can make system-wide changes affecting functionality, reports, and financial tracking. Augusoft encourages you to assign power user rights judiciously. In addition, the number of Power Users for your site is based on your Lumens license. You can purchase additional Power Users if needed. Ask your Implementation Specialist for details.

Those serving as Power Users must be registered with Augusoft. Once we receive your Power User form, Augusoft will assign power user rights for the staff listed. A copy of the Power User Registration Form can be found on *Customer Support > Document Center > General Documents > **Power User Registration Form.***

Augusoft recommends that any individual assigned Power User access have attended the entire Lumens implementation training and / or have been using the Lumens software for at least one year.

Power User Program Overview

Introduction - Continued

What does it mean to be a Power User?

Knowledgebase Article Description

Article ID: [17024] Article : What administrative functions does a Power User have?

What administrative functions does a Power user have?

In addition to managing Power User System Settings; a Power User can:

- Edit the refund method for a "cancelled registration" or "transfer with refund"
- Change the status of a term in the Instruction Calendar
- Move a Course to a different Category/Subcategory
- Edit email & print templates with System Options / Template Management
- Add/Edit staff profiles
- Assign a class to a different term
- Delete custom reports created by other staff members

What is the difference between a Power User and a Super User?

Knowledgebase Article Description

Article ID: [22223] Article : What is the difference between Super User and Power User?

What is the difference between Super User and Power User?

Super User and Power User can be rather confusing. However, Super User is a user role you assign to certain individual staff members, where as Power User is someone who is registered with Augusoft and Augusoft assigns these rights. Augusoft recommends Power User access to staff that attended the entire implementation training presented by an Augusoft Implementation & Training Specialist, or is someone with a minimum of 12 months experience using Lumens.

A **SUPER USER** with 'Grant administrator privileges' can access all System Options submenus EXCEPT Power User. If you do not grant administrative privileges, staff can only access System Options submenus: User Roles and Response Analysis Setup.

A **POWER USER** has rights to all System Options submenus, including Power User... this menu selection is where **you configure how you want your Lumens system to function**. In addition to managing the system settings, a registered power user can...

- Edit the **refund method** for a 'cancelled registration' or 'transfer with refund'
- Change the **status of a term** in the Instruction Calendar
- Move a **Course** to a different 'parent' Category / Subcategory
- Edit **email & print templates** with System Options / Template Management
- Manage **Staff profiles** to secure staff members' Username & Password
- Assign a **class** to a different term
- Delete **custom reports** created by other staff members

Power User Program Overview

Introduction - Continued

Power User Grid

<i>Highest Administrative Access Level</i>		POWER USER <i>May be assigned to ANY Staff Member to enhance User Role</i>			
MENU ACCESS	Sub Menu Access		SUPER USER	SUPER USER	STAFF MEMBER
			<i>WITH Grant Administrator Privileges</i>	<i>WITHOUT Grant Administrator Privileges</i>	<i>Select Menus as assigned by User Role</i>
REGISTRATION		X	X	X	X
STUDENTS		X	X	X	X
COURSE MANAGEMENT		X	X	X	X
CLASS INFO		X	X	X*	X
INSTRUCTORS		X	X	X	X
ROOM MANAGEMENT**		X	X	X	X
REPORTS		X	X	X	X
FINANCIAL MANAGEMENT		X	X	X	X
USAEPAY		X	X	X	X
CUSTOMER SUPPORT		X	X	X	X
TRACKER		X	X	X	X
CONTRACT TRAINING**		X	X	X	X
SYSTEM OPTIONS		X	X	X	X*
	System Preferences	X	X		X*
	Site Configuration	X	X		X*
	Power User	X			
	Instructional Calendar	X	X*		X*
	Financial Policies	X	X		X*
	Promotions	X	X*		X*
	Staff Members	X			
	Optional Field Setup	X	X		X*
	List Value Management	X	X		X*
	User Roles	X	X		X*
	Email Servers	X	X		X*
	Template Management	X	X*		X*
	Response Analysis Set Up	X	X	X	X*
	Audit Info	X	X	X	X*
	Inactive/Deleted	X	X	X	X*
	Dashboard Admin	X			

* Limited Access

Three submenus under System Options can only be accessed by a designated Power User - Power User, Staff Members and Dashboard Admin.

Additional Resources:

This grid is available online.

[Customer Support > Document Center > Quick Reference Library > User Access Grid](#)



Instructor Management 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.

System Options

Power User Settings




Objectives for System Options for Power Users:

- Update and review the Power User view
- Add a Staff Member to Lumens
- Review changing the status of a term in the Instruction Calendar
- Update Email Templates

This section of the workbook will focus on the System Option menu items available to Power Users. From the System Options menu item, Power Users can manage a variety of items when updates or changes are needed.

The functions displayed will only be available to a staff member with Power User access. In order to be given this access in your production site, you must have an active Power User Registration form on file with your name listed. The most updated form can be found on your Lumens site: *Customer Support > Doc Center > General Support Documents > **Power User Registration Form***



*System Options > **Power User***

The Power User system setting options are:

- 3rd Party Payment Settings
- Address Verification Configuration
- Class Listing Display Settings
- Class Refund Policy Management
- Class Set-up Settings
- Course Display Settings
- Donation Settings
- Fiscal Year Management
- General Settings
- Global Skip Dates
- Grade Settings
- Graphics
- Hours of Operations
- Merchandise Display Settings
- Merchandise Return Policy Management
- Merchandise Settings
- Release Form Management
- Report Settings
- Slim Profile Management
- User Navigation Labels

The next several pages will go over each group individually. These options are available based on a Professional License in Lumens. Other license options may provide more or less available Power User settings.



System Options

Power User Settings – 3rd Party Payment Settings



System Options > **Power User** *Click on 3rd Party Payment Settings.*

Power Users: System Settings: Edit Third Party Payments Settings

* denotes required information.

Allow Companies to Register Students? * Yes No

Allow companies to make payments to AR? * Yes No

Allow companies to make payments to only invoiced charges? * Yes No

Display Response Analysis Question to Company * Yes No

'Student' Displays to Company as *

Allow Students to Request 3rd Party Payment? * Yes No

Email for Student Requests

Default Search for Invoices * Registrations Transactions Contract

Default Search for Payments * Registrations Transactions Contract

Use Credit Memos? * Yes No

Send Email to Student when Payment is made to Student's A/R Account * Yes No

Send Email to Student when Payment is made to Student's Balance on a Company's A/R Account * Yes No

Send Email to Company when Payment is made to Company's A/R Account * Yes No

Send Transaction Receipt to Student during Registrations Cancellation? * Yes No

Send Transaction Receipt to 3rd party during Registration Cancellation? * Yes No

3rd Party Settings are active if your site is configured to use Accounts Receivable.



Additional References:

Customer Support > Document Center > Lumens Lite > 3rd Party Payment Settings



System Options



For Company:

Allow Companies to Register Students? *	<input checked="" type="radio"/> Yes <input type="radio"/> No
Allow companies to make payments to AR? *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Display Response Analysis Question to Company *	<input type="radio"/> Yes <input checked="" type="radio"/> No
'Student' Displays to Company as *	<input type="text" value="Student"/>

Allow Companies to register students?: Allow Companies to register students associated with their company. This can be inactivated at the company level.

Allow Companies to make payments to AR?: Allows a payment option for outstanding accounts receivables.

Display Response Analysis Question to Company: If response analysis is activated, then you will have the option to display this with company registrations.

Student Displays to Company as: Here you can change what you call the student within the site. For example, you can change it to employee, Staff, Student, etc.

For Students:

Allow Students to Request 3rd Party Payment? *	<input checked="" type="radio"/> Yes <input type="radio"/> No
Email for Student Requests	<input type="text"/>

Allow Students to request 3rd Party Payment?: This allows a student to request a company pay for their registration. This request does not actually reserve a seat for the student or request a payment but creates a communication with the school and the company to decide approval or deny.

Email for Students Requests: If the above is activated, this is the email address that will receive the request at the school.

System Options

Power User Settings – 3rd Party Payment Settings - Continued



For Staff:

Default Search for Invoices *	<input checked="" type="radio"/> Registrations	<input type="radio"/> Transactions
Default Search for Payments *	<input checked="" type="radio"/> Registrations	<input type="radio"/> Transactions
Use Credit Memos? *	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Send Email to Student when Payment is made to Student's A/R Account *	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Send Email to Student when Payment is made to Student's Balance on a Company's A/R Account *	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Send Email to Company when Payment is made to Company's A/R Account *	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Send Transaction Receipt to Student during Registrations Cancellation? *	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Send Transaction Receipt to 3rd party during Registration Cancellation? *	<input type="radio"/> Yes	<input checked="" type="radio"/> No

Default Search for Invoices / Payments: These set the default search method in AR for payments and invoicing.

Use Credit Memos?: If yes, the credit memo menu option displays.

Send email to...: These 3 options set the defaults for when payments are applied to AR accounts the email template is located in *System Options > Templates*. These options will display at the time of payment and can be modified.

Send Transaction Receipt to...: These 2 options set the defaults for when payments are applied to AR accounts and if a transaction receipt is automatically sent or not. These options will display at the time of payment and can be modified.

Questions:

Will your organization use accounts receivables in Lumens?

If so, will you allow Companies to access their profile and / or assign students to a company?



System Options

Power User Settings – Address Verification



System Options > Power User Click on *Address Verification*

The address verification feature leverages the United State Postal Service address database to provide address validation and cleansing. This is a free service from the USPS, but each Lumens customer must register for their own account.

These fields accept your assigned username and password.

Power Users: System Settings: Edit Address Verification Configuration

USPS API Username

USPS API Password

You must first request access to the Address Information API from the USPS. Once you have that you can set it all up here by choosing *Edit* from the Address Verification Configuration section of Power User settings.

Do not set up your address verification process in staging, only in your production site. The setup is only for use on a single site. If set up in staging, it will not work in production.



Additional References:

Customer Support > Document Center > Quick Reference Aid > Address Verification



System Options

Power User Settings – Class Listing Display



System Options > **Power User** Click on *Class Listing Display Settings*

Power Users: System Settings: Edit Class Listing Display Settings

Class Listing Settings: First Line		Second Line
Class Name	Cost	
Course Number	Materials Fee Cost	
Instructor	Member Cost	
None	Available Discounts Link	
None	Available Merchandise Link	
None	None	

Class Listing Settings: Third Line

Class Schedule
Class Times
Days of the Week
None
None
None

Class Listing Settings: Fourth Line (Staff Only)

None
Capacity
None
None
Seats Left

Class Listing Settings: Custom Labels for Cost fields

Class Cost Label	Materials Cost Label	Member Cost Label
Tuition:	Materials Cost:	Member Cost:

Class Listing Settings: Other

Group Online Course Provider Classes In Class Listing	<input type="radio"/> Yes <input checked="" type="radio"/> No
Group Other Classes In Class Listing	<input type="radio"/> Yes <input checked="" type="radio"/> No
Display Registration Close Date on 'Class Information' screen	<input type="radio"/> Yes <input checked="" type="radio"/> No
Display On the 'Class Information' screen	<input type="text" value="Course Number"/> <input checked="" type="text" value="Class ID"/> <input type="text" value="Section Number"/>
Default Class Listing Sort Method	<input type="text" value="Start Date"/>
Enable Sort and Filter by Term	<input type="radio"/> Yes <input checked="" type="radio"/> No

These fields define what displays and in what order.

Labels

Default settings

System Options

Power User Settings – Class Listing Display - Continued



First 3 lines will display to public: Each has a total of 6 available fields to display.

Example of the display (staff view)

Line 1

- Class Name

Line 2

- Class Start Date
- Class End Date
- Cost

Line 3

- Location
- Classroom
- Instructor
- Course URL

Line 4 (Staff view only)

- Total / Filled Seats
- Internal Comments
- GoNumber

Active Leadership
– Edit
Start date: 08/11/18
End date: 09/01/18
Tuition \$55.00
Location : Cedar Falls Center
Room : 111
Instructor : Multiple
Total/Filled: 20/0 (OE 8/0 Reserved 12/0)
Target Class Receipts: \$0.00

Line 1-3 Examples:

- Course Title
- Course URL
- Class Name
- Course Number
- Class ID
- Section Number
- Class Schedule
- Class Times
- Class Start Date
- Class End Date
- Class Rating
- Number of Sessions
- Number of Weeks
- Days of the Week
- Cost
- Member Cost
- Materials Fee Cost

- Available Discounts Link
- City
- Location
- City / Location
- Classroom
- Instructor
- Special Notice
- Class Ages
- # Seats Left
- Contact Hours
- CEUs
- Instructional Method
- Course URL Text
- Class URL
- Class URL Text
- Class Rating Graphic

Line 4 Examples:

- Total / Filled Seats
- Capacity
- Internal Comments
- Location
- Classroom
- Available Discounts
- Go Number
- # Seats Left
- Contact Hours
- CEUs

System Options

Power User Settings – Class Listing Display - Continued



Labels & Default Settings

Custom Labels for Cost fields:

Cost labels can be customized to reflect your program’s nomenclature. For example, “tuition” may be termed “session fee” in your organization.

Group Online Course Provider Classes in Class Listing: Check yes if you want online classes to be grouped together for display in your site.

Group Other Classes in Class Listing: Select Yes here if you want multiple sessions to display grouped together.

Display Registration Close Date on Class Information screen: Do you want the public to know when registration closes for each class?

Display On the Class Information screen: Choices to display in drop down are Course Number, Class ID, and or Section Number. (Multiple choices available by using control + alt key select.) Which number is used by your organization?

Default Class Listing Sort Method: Deciding sort method will affect how your classes are located. Pay careful attention to meet the needs of your students.

Enable Sort and Filter by Term: Choose Yes or No.

System Options

Power User Settings – Class Refund Policy Mgmt.



System Options > **Power User** Choose *Class Refund Policy Management*

Refund Policy Name: This will display in the drop down when you associate the refund policy with a course or class.

Default Refund Method: During a cancel or transfer, this will display as the default. Other methods will be available in the drop down.

Day Type: This is the number of days before the system will calculate a service fee.

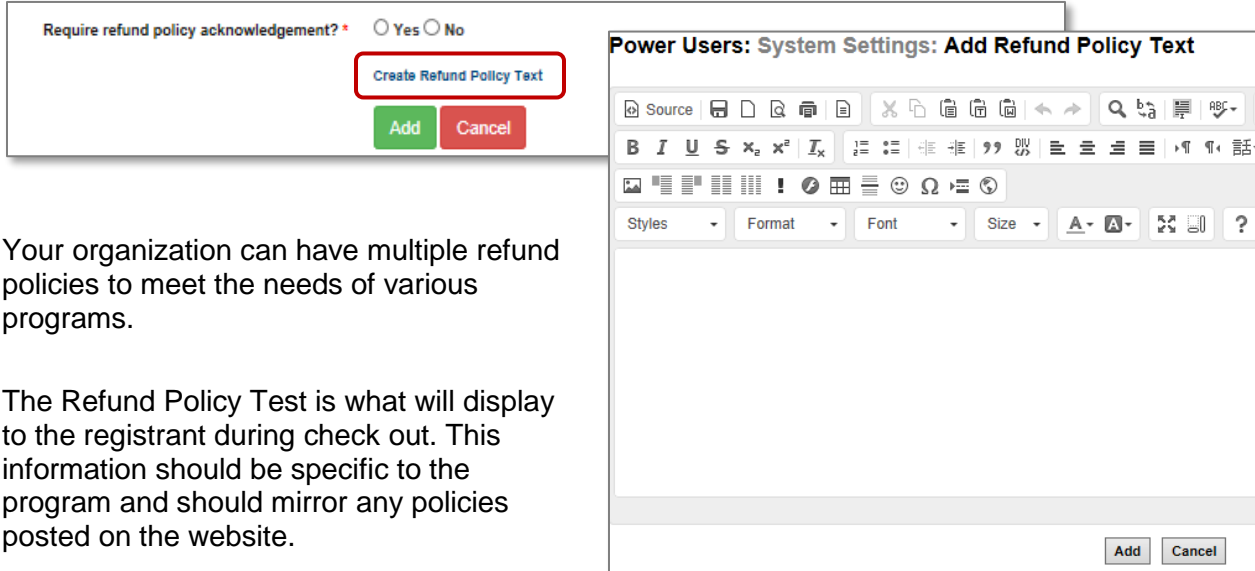
Days before class start to cancel without incurring a service fee: Lumens will automatically list a service fee at a cancel or transfer based on the number of days listed. During cancel or transfer the processor will have the ability to not charge the fee.

Cancellation service fee method: Determine whether the fee be a flat fee or a calculated percentage of tuition.

Cancellation rate or amount: If flat fee, enter an amount, if percentage, use decimal. (for example: 10.0 = 10%).

Require refund policy acknowledgement: If checked, it will require the registrant to check a box indicating they have read the refund policy.

System Options



Your organization can have multiple refund policies to meet the needs of various programs.

The Refund Policy Test is what will display to the registrant during check out. This information should be specific to the program and should mirror any policies posted on the website.

Refund Policy

A refund policy can be assigned at the Category, Subcategory, Course, or Class level. Refund policies will apply to both cancellations and transfers but can be bypassed by staff during the cancellation or transfer process.

If you use any Online Course Providers (OCPs), these refund policies will display. Do not change these policies as they were created by the OCP.

Try It!:

Modify the existing Standard Refund Policy:

- Edit the Refund Policy Text
- Add a Service fee of \$10.00
- Set the fee to apply 5 calendar days before class start



Refund policies should be posted on your website (FAQs) as well as creating the pop up that displays at registration.



System Options

Power User Settings – Class Set Up Settings



System Options > **Power User** Select Class Set-up Settings.

Power Users: System Settings: Edit Class Set-Up Settings

Close registration how many days prior to class start date?

Late registration how many days after class end date?

Cancel/Transfer registration how many days after class end date?

Use Registration Age Limits? Yes No

Quality Score upper Limit*

Allow Class Proof-of-Completion templates?*

Send class reminders to students ? # of Days

Send class reminders to Instructors ? # of Days

Send reminders to students before time-limited classes end?* Yes No

Default time period before time-limited classes end* Qty: Interval:

Default for Class Costs to Calculate Go/No Go Number?*

Default Class Cost Multiplier Values:*

Add

Special	<input type="text" value="1.0"/>
Standard	<input type="text" value="1.0"/>

Close registration: This is the default setting for registrations in relation to Class start date.

Late Registration: This number defines the list of Classes that will display when choosing the Late Registration link. For example, if a class ended on November 1 and the late registration was set for 30 days, the class will no longer display in the late registration view after November 30. The system will allow up to 999 days.

Cancel / Transfer: Just like late registration, this is the number of days a class will continue to display in the student view when the cancel or transfer link is chosen.

System Options

Power User Settings – Class Set Up Settings - Continued



Use Registration Age Limits?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Quality Score upper Limit*	<input type="text" value="5"/>
Allow Class Proof-of-Completion templates?*	<input type="text" value="Single"/>
Send class reminders to students ?	<input type="text" value="Neither of the above"/> # of Days <input type="text"/>
Send class reminders to Instructors ?	<input type="text" value="Neither of the above"/> # of Days <input type="text"/>
Send reminders to students before time-limited classes end?*	<input type="radio"/> Yes <input checked="" type="radio"/> No
Default time period before time-limited classes end?*	Qty: <input type="text" value="2"/> Interval: <input type="text" value="Weeks"/>
Default for Class Costs to Calculate Go/No Go Number?*	<input type="text" value="Instructor Costs"/> <input type="text" value="Organization's Material Cost"/> <input type="text" value="Class Prep"/> <input type="text" value="Overhead"/>
Default Class Cost Multiplier Values:*	
Add	
<input type="text" value="Special"/>	<input type="text" value="1.0"/>
<input type="text" value="Standard"/>	<input type="text" value="1.0"/>
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

Use Registration Age Limits?: If set to Yes, provides a field in the Course / Class set up so you can place minimum and maximum ages for a class. This is a nice option for youth Courses.

Quality Score Limit: If you track quality scores by class, this sets the highest number that can be entered. For example, using score of 1-5, then 5 would be the number entered.

Allow Class Proof-of-Completion templates: If you want to allow either Staff and or Students to print proof completion documents, you must decide if you will use a single proof of completion document for all classes or if you use different documents for specific classes.

Additional Reference:

The Class Proof-of-Completion templates have a training available for review.

*Customer Support > Document Center > Training Review Documents > **Class Proof-Of-Completion***



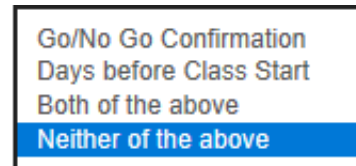
System Options

Power User Settings – Class Set Up Settings - Continued



Send class reminders to...?: Both Instructors and students have this option. You can choose when reminders are sent out to Students after registration.

- **Go / No Go Confirmation:** Students will receive a reminder when the class is confirmed on the Go / No Go screen.
- **Days before Class Start:** students will receive the reminder email the number of days listed before class start.
- *Both of the above* will send the reminder at both points – number of days AND class confirmation.
- *Neither of the above* a class reminder will not go out.



Send Reminders to students before time-limited classes end?: This defines if reminders will be sent and if set to yes, the Quantity and Interval prior to the classes end date is also set.

Default for Class Costs...: This provides defaults based on the items active in your site that can be used to support your Go / No Go number. Enhanced Costs features affect the number of fields available.

The multiplier values can be set and chosen at class creation.

System Options

Power User Settings – Course Display Settings



System Options > Power User **Course Display Settings**

Power Users: System Settings: Edit Course Display Settings

Course Display Settings: First Line		Second Line	
Course Name	▼	Description	▼
None	▼	None	▼
None	▼	None	▼
None	▼	None	▼

Course Display Settings: Other

Enable Course Search? Yes No

Submit Cancel

These display settings will be effective if you choose to enable Course Search (see explanation below). It provides the option to search for a course when the *search does not* return any active classes. This page is similar to Class listing display settings, and therefore, staff control what fields display.

Enable Course Search:

If the Course Search feature is used, when a student searches for a Class and no active Classes are found, *Courses* are also searched and will be displayed so the student knows that the Course may be available at a different time and can receive notification next time it is available. The course search feature can be accessed by the Search menu item, or in the search field at the top right-hand side of screen.

Classes starting on or after

Classes starting on or before

Instructor ▼

Course name

System Options

Power User Settings – Donation Settings



System Options > **Power User** Click on *Donation Settings*

Donations will display if your site has activated the feature. The donation feature allows your program to offer supporters a way to donate any dollar amount to your program whether they have an active profile with Lumens or not.

Donate / Donation displays as: This provides the option to modify the term donation to what fits your organization.

Display Donate option in Left Hand Nav / shortcut bar: This allows you to determine where on your site this link is to display.

Donate Graphic: Available if you'd like to display an image next to the link.

System Options > Power User Click on *Donation Setting* and edit *Donation Types*.

You can have one or more active donation types.

Donation Type Name: When more than one is built, provides a drop-down list.

Sort Order: Identifies where in the drop down list this type will display.

Description: Provide a description to ensure it is clear the purpose of each donation type.

System Options

Power User Settings – Fiscal Year Management



System Options > **Power User** Click on *Fiscal Year Management*

A screenshot of a web form titled 'Power Users: System Settings: Add Fiscal Year'. The form contains three input fields: 'Fiscal Year Name *', 'Fiscal Year Start Date', and 'Fiscal Year End Date *'. The 'Fiscal Year Start Date' and 'Fiscal Year End Date' fields have calendar icons to their right. At the bottom of the form are two buttons: a green 'Submit' button and a grey 'Cancel' button.

To create a fiscal year financial reporting option, first your organization must request the fiscal year feature to be activated.

If your organization requires the ability to track financials specific to a fiscal year, such as a Student registering for a class that will be held in 2019 fiscal year, but the registration occurs in 2018 fiscal year, the Deferred Revenue report will report on the registration for the 2019 fiscal year. If your program does not use deferred revenue, there is traditionally no reason to use the Fiscal Year Management feature.

To set up a Fiscal Year, enter:

- Year Name
- Year Start Date
- Year End Date

Then click *Submit*. This will create an option available in reports to pull revenue specific to that fiscal year based on the class dates that fall within the fiscal year.

The following reports support Fiscal Year Management:

- Deferred Revenue
- Tuition Listing Report

Additional Reference:

There is a quick reference aid on Fiscal Year Management to assist in information.

*Customer Support > Document Center > Quick Reference Library > **Fiscal Year Management***



System Options

Power User Settings – General Settings



System Options > **Power User** Click on *General Settings*

Registration Fee: Only displays if activated. Presets a registration fee. The fee applies based on the 2 fields below – days or term (applying a fee by day defined or by term). The system will auto generate the fee based on these criteria and each Student’s registration.

Use Membership benefits: Only displays if Membership feature is in use. Provides an additional feature within memberships.

Memberships / Member display as: If Membership in use, provides the option to use a different default term for members / membership.

Allow Student Ratings: If set to Yes, the student has the option to rate the class in his / her transcript once the Class has ended.

Student Holds: If yes, provides an option to place a hold on a student account (profile) that will not allow the profile to register for classes. A pop up appears indicating the student should contact the school for further information.

Age as of Date: This is a discount option (if chosen) that can be applied to a class to grant a discount to students who are under a certain age. This must be defined before a discount can be added to a class.

Maximum refund override variance: The amount entered will impact cancels and transfers. The refund amount is automatically calculated based on the refund policy. This allows the processor to modify the amount up or down based on the dollar amount listed.

System Options

Power User Settings – General Settings - Continued



Electronic voucher valid for	<input type="text" value="12"/>
	number of months
Sell Gift Cards	<input checked="" type="radio"/> Yes <input type="radio"/> No
Course Series Sorting Method	<input type="text" value="Course Series Display First"/>
Enable Online Course Providers	ProTrain <input checked="" type="radio"/> Yes <input type="radio"/> No
	UGotClass <input checked="" type="radio"/> Yes <input type="radio"/> No
	Pearson Workforce Education <input checked="" type="radio"/> Yes <input type="radio"/> No
	World Education <input checked="" type="radio"/> Yes <input type="radio"/> No
Default Setting for Applying Electronic Vouchers	<input checked="" type="radio"/> Apply Electronic Vouchers <input type="radio"/> Do Not Apply Electronic Vouchers
Show Company Field to Students	<input type="radio"/> Yes <input checked="" type="radio"/> No
Show social media links	<input checked="" type="radio"/> Yes <input type="radio"/> No

Electronic voucher valid for: If using electronic vouchers, this indicates the amount of time the voucher will be valid in the system.

Sell Gift Cards: If selected, the gift card link will display. To ensure proper financial tracking, associate an accounting code to gift cards (Financial Mgmt > Acct Codes).

Course Series Sorting Method: This option displays if you have course series active. Provides the option to set series classes to display ahead, intermingled, or after classes.

Enable Course Provides: Lumens has several Online Course Providers (OCPs) to choose from. Checking Yes will add menu option necessary to set up the OCP (see below).

Default Setting for Applying Electronic Vouchers: Apply / Do Not Apply, tells the system to apply during a staff registration automatically any applicable voucher. When a student registers, the voucher amount is always automatically applied.

Show Company Field to Students: If Yes, provides a company drop down list for students to self-assign. The drop-down list is based on the company profiles created in your site.

Show Social Media Links: If Yes, your media links display on the class details page. This only applies to production sites, not staging.

Additional Reference:

There are several quick reference aids on the various OCPs offered.

*Customer Support > Document Center > **Quick Reference Library** In the library, search by OCP name.*



System Options

Power User Settings – General Settings - Continued

A screenshot of a web-based system options form. It contains several settings with radio buttons and dropdown menus. The settings are: 'Display Last Viewed' (Yes/No), 'Display Class Instructional Method to Public?' (Yes/No), 'Require Email address as Username' (Yes/No), 'Use Facebook Login' (Yes/No), 'Allow Unapproved Earnings in an Instructor Contract?' (Yes/No), 'Default Super User Dashboard' (dropdown menu with 'Super' selected), 'Record Attendance Default Display' (Record Attendance for Each Class Session / Consolidate Class Sessions for Each Day), and 'Display Location/Room details on Transaction Receipt?' (dropdown menu with 'Location' and 'Room' selected).

Display Last Viewed: Classes the Guests and Students have previously looked at will display at the bottom of the screen.

Display Class Instructional Method: If yes, the instructional method chosen at class creation will display with the class to the public.

Require Email address as Username: Offers some automation in profile creation. When a Student creates a profile, it will automatically use their email as their username (see below).

Use Facebook Login: This feature, although available is not recommended. Facebook logins are not traditionally as secure as we recommend.

Allow Unapproved Earnings in Instructor Contract?: This applies to organizations using Instructor Contracts.

Default Super User Dashboard: This will allow you to display the Dashboard to Staff who are Super Users when they log in.

Record Attendance Default Display: Provides options for how attendance will display when Staff or Instructors are updating.

Display Location / Room details on Transaction Receipt?: Provides an option to include on transaction receipt.

Additional Reference:

There are several quick reference aids on Emails as a Username and one on uploads.
*Customer Support > Document Center > Quick Reference Library > **Email as Username***



System Options

Power User Settings – General Settings - Continued

A screenshot of a settings panel titled 'System Options'. It contains several configuration items, each with a label and radio button options. The 'Upload student files to transcript for*' dropdown is set to 'Classes'. The other options are: 'Display uploaded files to Student?' (Yes selected), 'Allow students to edit profile?' (Yes selected), 'Allow instructors to edit profile?' (Yes selected), 'Allow Students to Print Class Proof-of-Completion documents?' (Yes selected), 'Allow Staff to Email Class Proof-of-Completion documents?' (Yes selected), 'Solicit Volunteer Liaisons during Lottery Requests?' (Yes selected), and 'Hide Waiting List Rank on Student Display?' (No selected).

Upload Student Files to Student?: Provides a way to upload all kinds of files to the Student’s profile so they and or staff can access it when needed (see below).

Display Uploaded Files to Student: Provides the option to display any uploaded files for to the Student to view.

Allow Students / Instructors to edit profile: The default is set to yes, however, you can remove the option so either of these individuals will not be able to modify their website profile.

Allow Students to Print Class Proof-of-Completion documents?: A link is provided for the student on their transcripts. The document can also be printed by staff if no is chosen.

Allow staff to email Class Proof-of-Completion documents?: The staff will have an email option available to them in the student’s transcript view.

Solicit Volunteer Liaisons during Lottery Requests?: This only applies if Lottery is activated on your site. If yes, additional options display within the Lottery feature.

Hide Waiting List Rank on student display?: Students will be unable to see their ranking when they add themselves to a wait list. This only applies if your site is using the wait list feature.

Additional Reference:

There is a quick reference aid on Student Uploads and Lottery Settings.
*Customer Support > Document Center > Quick Reference Library > **Upload File to Student Profile and Lottery Settings***



System Options

Power User Settings – General Settings - continued



Allow Students to override Schedule Conflict warning? *	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Allow student to make payments to AR? *	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Show Categories in Menu? *	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Send Learner Confirmation email to students who win the lottery for a class with registration price = \$0?*	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Password Expires in Days *	Students	<input type="text" value="0"/>
	Company	<input type="text" value="0"/>
	Instructors	<input type="text" value="0"/>
	Staff	<input type="text" value="0"/>
	PowerUsers	<input type="text" value="0"/>
		<input type="button" value="Submit"/> <input type="button" value="Cancel"/>

Allow Students to override of Schedule Conflict warning?: If a conflict exists between two classes, registrant receives a pop-up notification but can still register for the class. This can be effective for schools that have open ended classes where it may only appear to conflict.

Allow student to make payment to AR?: Students with an accounts receivable balance will have a link to apply a payment towards that amount. Same payment options apply (CC). This only applies if your organization is using the AR feature.

Show Categories in Menu?: Provides the option to have your categories display in the upper right of your website.

Send Learner Confirmation email to students who the Lottery for a class registration?: This will only display if Lottery is activated on your site. It provides the option of sending Student confirmations even if the class price is \$0.00.

Password Expires in Days?: This feature allows you the option to set password expirations based on a certain number of days. If left to 0, passwords will not expire.

Retention Activity:

Several of the General Settings will require conversations throughout your organization. Document the top three that should be reviewed in the next 3-5 business days.



System Options

Power User Settings – Global Skip Dates



System Options > Power User > **Global Skip Dates**

Power Users: System Settings: Add Global Skip Date

* denotes required information.

Date *

Skip Date Description

Global Skip dates are typically holidays, school breaks, or dates your organization has decided not to hold classes. When these dates are added, they are automatically considered when a Class schedule is created.

To create a date:

- Enter the date
- Enter the description (this will display along with the date on the conflict pop up).

Dates can be added any time, however newly added Global Skip Dates will not take into consideration Classes previously created, nor notify you. It is best to set up skip dates prior to Course / Class creation if possible.

Try It!:

Work together and each add an applicable skip date (For example: Thanksgiving, Labor Day, etc.):

- Let your implementation specialist know when complete.

Retention Activity:

Assign one person in your group to add several Global Skip Dates to your site before the next training session.

Ripple Effect:

Global Skip Dates affect your class schedule. Any time a class meeting conflicts with a Global Skip Date a pop-up message appears. The message is a notification that allows the creator the option to override and schedule the class that day any way or not to use the date (which may extend the class end date).



System Options

Power User Settings – Grade Settings



System Options > **Power User** Click on *Grade Settings*

This option will display if you have the Gradebook feature activated.

Use Grade Scales: The option to create grade scales display

Final Grade an average of all grades: If yes, the student final grade will display as the average of all the grade data collected for a given class.

Allow Instructors to set up grades?: This provides an option in each Instructor’s profile to set up grades for a class to which the Instructor is assigned.

Allow Students to view Class Grade Detail?: This allows the Student to see the grade detail document. This is an item built using a document editor template.

Default Grade Management Level?: The options are: None, Record Grades, or Gradebook. This is the default set in each class, however can be adjusted at each course creation.

Access the Document Editor to create a Class Grade Details template. Can be used like a report card.

Additional Reference:

If you wish to use Gradebook, additional Quick References are available.

*Customer Support > Document Center > Quick Reference Library > **Gradebook, Using Gradebook, and Document Editor***



System Options

Power User Settings – Grade Settings - Continued



Add Grade Scale

Complete the fields below. If you wish to add another grade option within the scale, select the 'Add Grade' button

Grade Scale Name

Grade Name	Description (optional)	Lowest Value in Grade (required)	Highest Value in Grade (required)	Sort Order	Active
Add Grade					
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No

Grade Scale Name: This will be listed in the grade scale drop down at Course and Class creation.

Grade Name, Description, Lowest / Highest Value in Grade, Sort Order, Active.
See example below for A-F.
Other examples may be Pass / Fail, Level, etc.

Add Grade Scale

Complete the fields below. If you wish to add another grade option within the scale, select the 'Add Grade' button

Grade Scale Name

Grade Name	Description (optional)	Lowest Value in Grade (required)	Highest Value in Grade (required)	Sort Order	Active
Add Grade					
<input type="text" value="A"/>	<input type="text" value="A"/>	<input type="text" value="91"/>	<input type="text" value="100"/>	<input type="text" value="1"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No
<input type="text" value="B"/>	<input type="text" value="B"/>	<input type="text" value="81"/>	<input type="text" value="90"/>	<input type="text" value="2"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No
<input type="text" value="C"/>	<input type="text" value="C"/>	<input type="text" value="71"/>	<input type="text" value="80"/>	<input type="text" value="3"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No
<input type="text" value="D"/>	<input type="text" value="D"/>	<input type="text" value="61"/>	<input type="text" value="70"/>	<input type="text" value="4"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No
<input type="text" value="F"/>	<input type="text" value="F"/>	<input type="text" value="1"/>	<input type="text" value="60"/>	<input type="text" value="5"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No

Select	Grade Scale Name	Record Grade As	# of Grades	Grade Range
<input type="radio"/>	A-F	Number	5	1.00-100.00

System Options

Power User Settings – Graphics



System Options > **Power User** Click on *Graphics*

Power Users: Report Graphic Settings: Edit Report Graphic Settings

Orientation* Left-Justified Center-Justified Right-Justified

Graphic Width

Graphic Height

This graphic is set to display in your reports, no other location in Lumens. This feature is used when an organization wishes to pull reports directly from Lumens to send elsewhere and wants an image displaying on the report, such as a logo.

You can define the orientation and the height and width of the image.

Report Graphics [Edit](#)

The allowed file types are: .jpg, .gif or .png. Your choice of orientation will impact the size allowed.

Orientation
Graphic Width
Graphic Height

Last Viewed sub-Category graphic

Uploaded File:
Upload Report Graphic

Use jpg, gif, png file format, recommended maximum size 50KB

You can upload a variety of image types, JPG, .GIF, .PNG. The maximum size of the image should be no more than 50KB.

Ripple Effect:

This image will display on all reports generated in Lumens but can be suppressed at the report run / schedule page.



Questions:

Do you traditionally have a logo or organizational image included in reports to send to other areas?



System Options

Power User Settings – Hours of Operation



System Options > **Power User** Click on *Hours of Operations*

Power Users: System Settings: Edit Hours of Operations

The Hours of Operations feature performs two actions:

1. It sets the allowed times during which classes may be scheduled. If a class schedule is set up outside the times below, Lumens will provide a warning to the user. This warning may be over-ridden.
2. It sets the baseline for the 'Room Utilization' report. That report will compare the hours a classroom was in use during a specified time-period against the total possible hours available, defined by the schedule below, during the same time-period and provide a percentage of the time that the room was in use.

To enable this feature, set the 'Starting Time' and 'Ending Time' fields appropriately and select the 'Submit' button.
To disable this feature, select the 'Clear' button, which will clear the values from the 'Starting Time' and 'Ending Time' fields, and then then select the 'Submit', which will save those NULL values

Use Hours Of Operations Yes No

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Starting Time	07:00AM	07:00AM	07:00AM	07:00AM	07:00AM	07:00AM	07:00AM
Closing Time	10:00PM	10:00PM	10:00PM	10:00PM	10:00PM	10:00PM	10:00PM

The hours of operations feature:

- Sets times a class can be scheduled. This can be overwritten.
- Sets a baseline for the Room Utilization report. This compares the hours a classroom was in use during a specified period of time and the total possible hours available.

Try It!:

One person, enter the times your organization runs classes. The example above indicates an organization open from 7:00 AM to 10:00 PM.

- Let your Implementation Manager know when complete.



System Options

Power User Settings – Merchandise Settings



- ▶ Merchandise Display Settings
- ▶ Merchandise Return Policy Management
- ▶ Merchandise Settings

These options only display if the Merchandise feature is active.

System Options > **Power User** Click on *Merchandise Display Settings*.

Power Users: System Settings: Edit Merchandise Display Settings

Merchandise Display Settings: First Line	Second Line
Item Name <input type="text"/>	Item Description <input type="text"/>
Item SKU <input type="text"/>	Student Purchase Start Date <input type="text"/>
Item Price <input type="text"/>	Item Expiration Date <input type="text"/>
None <input type="text"/>	Quantity Available <input type="text"/>

Merchandise Display Settings: Third Line (Staff Only)

Taxable? <input type="text"/>
Available To Students <input type="text"/>
Staff Purchase Start Date <input type="text"/>
Student Display Start Date <input type="text"/>

These settings are similar to the Class Listing Display Settings. You can control what displays to Students regarding your merchandise.

- **1st Line Options:** Item Name, Item SKU, Item Price
- **2nd Line Options:** Item Description, Student Purchase Start Date, Item Expiration Date, Quantity Available
- **3rd Line Options (only viewable to staff):** Taxable?, Available to Students, Staff Purchase Start Date, Quantity Available, Staff Display Start Date

Class Syllabus

Item SKU: MAT-1001

Price: \$0.00

Class Syllabus

ADD TO CART »

System Options

Power User Settings – Merchandise Settings - Continued



System Options > **Power User** Click *Merchandise Return Policy Management*

Power Users: System Settings: Add Merchandise Return Policy

* denotes required fields

Return policy name *

Default refund method *

2nd default refund method *

Return processing fee method *

Return processing fee rate or amount*

Use '12.5' to enter 12.5%

Require return policy acknowledgement * Yes No

Charge processing fee on non delivered items * Yes No

Create Return Policy Text *

Source Save Undo Redo Cut Copy Paste Find Print Help

B *I* U ~~S~~ \times_e \times_r \times_x \times_y \times_z \times_{font} \times_{size} \times_{color} $\times_{\text{background}}$ \times_{border} \times_{list} \times_{table} \times_{link} \times_{unlink} \times_{code} \times_{help}

Styles - Format - Font - Size - A- A+ \times_{font} \times_{size} ?

Like the class refund policy set up, you can create a refund policy or multiple refund policies specific to the merchandise you are offering.

Return policy name: This is what will display in the drop down and reports.

Default refund method 2nd default refund method: This sets the default, it can be changed.

Return processing fee method / Return processing fee rate or amount: This provides an option to set a fee, either a rate or a flat fee, for returns. This is similar to a service fee.

Change processing fee on non-delivered items: Sets the option to use the processing fee for returned items never delivered.

Create Return Policy Text: This HTML template is the same used in the refund policy text.

System Options

Power User Settings – Merchandise Settings - Continued



System Options > **Power User** Click on *Merchandise Settings*

Power Users: System Settings: Edit Merchandise Settings

'Merchandise' displays as *

Sales Tax for Merchandise Yes No

Merchandise Sales Tax Rate *
Use '12.5' to enter 12.5%

Merchandise Measurement Type * Imperial

Delivery Type(s) Available *

e-distribution to student at transaction completion? Yes No

Pick Up Locations Multiple Single

Shipping

Flat Rate +

United States Postal Service +

FedEx +

United Parcel Service +

Use Min./Max. values for Merchandise? * Yes No

Minimum Quantity *

Maximum Quantity *

Name can be modified.

Choose Sales Tax Rate and list.

Set applicable delivery options.

Pick Up Locations allow a single or multiple location available for selection.

See next page on shipping.

Min / Max allows you to choose if there is a minimum or maximum quantity when requesting merchandise.

If the Power User setting is set to use minimum and maximum values and required with registration items is chosen, the Minimum Value and Maximum Value boxes will display. If set to No, those fields are not available.

Example of screen display if minimum and maximum is active allowing these fields to be edited. Minimum and maximums are available when associating an item to a class.

Required w/ Registration?	Set Price to \$0 w/ Class?	Minimum Value	Maximum Value
<input checked="" type="checkbox"/> UnSelect All	<input type="checkbox"/> Select All	<input type="text" value="1"/>	<input type="text" value="2"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="1"/>	<input type="text" value="1"/>

System Options

Power User Settings – Merchandise Settings - Continued



For Delivery Type(s) Available to display, configuration must include shipping.

Email / Download: Indicates the Student download this item after they pay. If yes, this will trigger delivery and prompt Student to download item immediately after purchase. If no, staff will need to ensure delivery at a later date.

Pick Up Locations: Identify single or multiple pick up locations and choose locations (defaulted from pre-defined list).

Ship: Rates may be determined by a flat rate or use real-time rates for their selected carriers (options are USPS (US only), Canada Post (Canada only), FedEx, and UPS).

The screenshot shows the 'Shipping' configuration page for a 'Flat Rate' service. It includes a section for 'Flat Rate' with an 'Enabled?' toggle set to 'Yes', an 'Amount' field containing '25.00', and an 'Accounting Code' dropdown menu. Below this, there are expandable sections for 'United States Postal Service', 'FedEx', and 'United Parcel Service', each with a plus sign to indicate it can be expanded.

Shipping options are a Flat Rate or from a selectable service.

Flat Rate is used if you charge a single rate for all shipping. Amount is the amount of the flat rate shipping charge.

This screenshot shows the expanded 'United States Postal Service' shipping settings. It features an 'Enabled?' toggle set to 'No', a 'User ID' field, a 'Services Enabled' list with checkboxes for 'Priority Mail Express', 'Priority Mail', 'First-Class Mail', and 'USPS Retail Ground', and an 'Accounting Code' dropdown menu. Below the settings are expandable sections for 'FedEx' and 'United Parcel Service'.

This screenshot shows the expanded 'United Parcel Service' shipping settings. It includes an 'Enabled?' toggle set to 'No', a 'Key' field, a 'User Name' field, a 'Password' field, a 'Services Enabled' list with checkboxes for 'UPS Express Critical', 'UPS Next Day Air', 'UPS 2nd Day Air', and 'UPS 3 Day Select', and an 'Accounting Code' dropdown menu.

Carriers available:

- FedEx
- United Parcel Service (UPS) (US Only)
- Canada Post (Canada Only)
- United States Postal Service (USPS) – US Only

Available carriers have settings for their specific API / account information - these fields may vary by carrier. Customers create API accounts for the carriers for which they want to use real-time rates.

System Options

Power User Settings – Release Form Management



System Options > **Power User** Click on *Release Form Management*

Power Users: System Settings: Add Release Form
* denotes required information.

Release Form Name *

Alternate Title
If entered, will replace "[release form name]: Release Form" on input popup.

Responses Editable?

Create Release Form Text *
NOTE: You can click drag the release form fields below to change the order.

Emergency Contact Name * Required Optional Do Not Use

Emergency Contact Phone #1 * Required Optional Do Not Use

Emergency Contact Phone #2 * Required Optional Do Not Use

Emergency Contact Email * Required Optional Do Not Use

Additional Fields Required? *

Power Users: System Settings: Add Release Form Text

text

(Class Address)
(Class Address 2)
(Class City, State, Zip)
(Class Comments)

Power Users: System Settings: Additional Release Form Fields
* denotes required information

Field Name *

Required? * Required Optional Do Not Use

You must create the release form in advance of the class to have it available to associate or attach to a class.

Additional Reference:

If you wish to use Release Forms a Quick Reference is available.

*Customer Support > Document Center > Quick Reference Library > **Release Forms***



System Options

The screenshot shows a web form for configuring release forms. It includes the following fields and options:

- Release Form Name ***: A text input field.
- Alternate Title**: A text input field with a note below it: "If entered, will replace "[release form name]: Release Form" on input popup."
- Responses Editable?**: A dropdown menu currently set to "No".
- Create Release Form Text ***: A section for defining the form's content, with a red note: "NOTE: You can click drag the release form fields below to change the order."
- Emergency Contact Name ***: Radio buttons for Required, Optional, or Do Not Use.
- Emergency Contact Phone #1 ***: Radio buttons for Required, Optional, or Do Not Use.
- Emergency Contact Phone #2 ***: Radio buttons for Required, Optional, or Do Not Use.
- Emergency Contact Email ***: Radio buttons for Required, Optional, or Do Not Use.

Release Form Name: This is the name that will display on the drop down.

Alternate Title: This will display on the form itself if you do not want the name of the form displaying.

Responses Editable?: This defines whether the entries can be modified at a later date.

Create Release Form: This is the text content of the release form.

Emergency Contact Name / Phone / Email: You can make these fields required, optional, or not in use.

Additional Fields Required?: This allows you to add other fields for example T-Shirt Size.

These fields are all text fields. These forms can be accessed in the student registrations and the Release Form Report.

Ripple Effect:

When you create a release form and assign it to a Course / Class, that release form will pop up at registration. The registrant must complete all the required fields before he / she can continue the registration.



Questions:

Do you currently have an emergency contact form you use for certain classes?
Do you have other information you want to gather on behalf of your organization or the Instructor before the class begins?



System Options

Power User Settings – Report Settings



System Options > **Power User** Click Report Settings

Power Users: System Settings: Edit Report Settings

*denotes required information.

Use sign-in sheets? * Yes No

Allow Instructors to access Release Forms? * Yes No

Allow Instructors to print class evaluations? * Yes No

Allow Instructor to view student information on the Class Sign In: *
Name
Learner ID
Phone number
Email
Company

Allow Staff Members to view student information on the Class Sign In: *
Name
Learner ID
Phone number
Email
Company

Provide Columns on Class Sign In for*
 One Column per Day
 One Column per Class Session

Allow Student information on the Instructor Roster:*
Name
Phone number
Email
Company

Allow Student information on the Staff Roster:*
Name
Phone number
Email
Company

Allow Total Attendance on Instructor Sign-In sheet?:* Yes No

Allow Final Grade on Instructor Sign-In sheet?:* Yes No

Submit

Use Sign in Sheets?: This provides sign in sheet availability for staff and instructors.

Allow Instructors to access Release Forms?: This is a default view, that can be managed at the instructor profile level if default is Yes.

Allow Instructors to print class evaluations?: Only displays if using evaluations.

Allow Instructors / Staff Members to view Student information on the class sign in: This list controls what Student data will display on sign in sheets.

Allow Student information on Instructor Roster / Staff Roster: This list controls what displays regarding the student on the rosters.

Allow Total Attendance / Final Grade on Instructor Sign-in?: This gives the option to record attendance and grades on the sign in sheets.

System Options

Power User Settings – Slim Profile Management



System Options > **Power User** Click on Slim Profile Management

	Use in Slim Profile?	Required?	Use Company Values?	Sort Order
First Name	Yes	Yes		1
Last Name	Yes	Yes		2
Email	Yes	Yes	<input type="checkbox"/>	3
Middle Name	<input type="checkbox"/>	<input type="checkbox"/>		<input type="text"/>
Maiden Name	<input type="checkbox"/>	<input type="checkbox"/>		<input type="text"/>
Company	<input type="checkbox"/>	<input type="checkbox"/>		<input type="text"/>
Country	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Address Line 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Address Line 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
City	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
State/Province	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Zip/Postal Code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Zip+4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Phone	<input type="checkbox"/>	<input type="checkbox"/>		<input type="text"/>
Additional Phone #2	<input type="checkbox"/>	<input type="checkbox"/>		<input type="text"/>
Additional Phone #3	<input type="checkbox"/>	<input type="checkbox"/>		<input type="text"/>
Additional Phone #4	<input type="checkbox"/>	<input type="checkbox"/>		<input type="text"/>

This option will display if using the Slim Profile feature. This allows you to identify the details you want to gather through a Slim Profile versus your full student profile. Name and email are still required. Slim profiles are not captured by our duplicate profile detection.

This feature is most commonly used for schools wanting to track company employee profiles.

Additional Reference:

There is a Lumens Lite supplemental training document related to creation of slim profiles which goes into more detail here: *Customer Support > Document Center > Lumens Lite > **Slim & Fast Company Registrations.***



System Options

Power User Settings – User Navigation Labels



System Options > Power User – User Navigation Labels

The screenshot shows the 'User Navigation Labels' configuration page. A red box highlights the 'Guest User' row, and a red arrow points from it to the 'Edit Course Series Type Labels' dialog box. The dialog box shows a table for 'Course Series Type Labels' with columns for 'Course Series Type Name' and 'Course Series Type Label'. The table contains three rows: 'Certificate', 'Certificate Series', and 'Series'. The 'Certificate' row has a text input field with 'Certificate' entered. The 'Certificate Series' row has a text input field with 'Certificate Series' entered. The 'Series' row has a text input field with 'Series' entered. There are 'Submit' and 'Cancel' buttons at the bottom of the dialog box.

Lumens provides options to modify menu labels for various viewers. The example above is showing the modification view for a Guest User.

Course Series Type Labels: Apply to Class Series labels. When you create a Series in Lumens, a Course Series Label drop down appears. Lumens displays some default labels, but the user can build labels applicable to their organization’s offerings.

Ripple Effect:

These menu items are listed in the site configuration. If custom menus have been added, they too will display. Also, the menu changes will only apply to the specific view edited (Guest, Student, etc.), to keep continuity in your site, changing a menu item such as Sign In, should be changed under all views to match.



System Options

Staff Members: Create Profiles



System Options > Staff Members

Staff

Last Name First Name

Add Staff Member
Designates Power User

Action	Name	Email	Phone 1	Login	Status
--------	------	-------	---------	-------	--------

Add Staff Member * denotes required information.

Username *
minimum 6, maximum 255 characters

Password *
strength
□□□□
Minimum 8 characters, must contain a number and any two of the following three: upper case, lower case, special characters (for example: !@#\$%^&*)

Re-enter password *

Identity Verification Question

Identity Verification Answer

Password hint *

Default region *

Find classes by which method? Courses Menu Courses Search

Grant administrator privileges? Yes No

User Role

Default Dashboard Display

Consider using email as username or some other consistent nomenclature for staff usernames.

The Super User role is an internal user role created and maintained by Augusoft. This group will automatically receive new menus and submenus. You want to ensure, when creating staff profiles, that at least one person is assigned Super User for their user role.

Power Users are frequently assigned the Super User role, and by granting them Grant Administrative Privileges will ensure full system access.

Editing a Profile: Staff who are not Power Users, have a profile view that allows them to make basic adjustments to their profile, but not user roles.

System Options

Staff Members - Create Profiles - Continued



An active profile can be edited by clicking *Edit* from the drop down Action down box, and the profile view will display. The username cannot be edited but all other fields can be. Notice, you cannot view the password, therefore the password hint is very important.

The screenshot shows the 'Staff' management interface. At the top, there are search fields for 'Last Name' and 'First Name', and 'Search' and 'Clear' buttons. Below this is an 'Add Staff Member' button with a note '* designates Power User'. The main part of the interface is a table with columns: Action, Name, Email, Phone 1, Login, and Status. The table shows three staff members: Steven Crespo, Marion Davis, and Steven Dumas, all with 'Active' status. A red box highlights the 'Inactivate' option in the 'Action' dropdown for the first row. A confirmation dialog box is open, asking 'Are you sure you want to INACTIVATE this staff member?' with 'OK' and 'Cancel' buttons. Another dialog box titled 'Change Reason' is also open, asking for a reason for the change and featuring a 'Save' button.

Activate / Inactivate a profile:

If a Staff member no longer requires access to your Lumens website, a Power User can inactivate the profile. A warning message will appear to ensure this is what you want to do. The profile will move to the inactive profiles (end of the list). The profile can be reactivated if necessary.

This screenshot shows the 'Staff' management interface after a profile has been inactivated. The table now only contains one entry: Steven Crespo, whose status is 'Inactive'. An 'Activate' button is visible below the table row.

Try It!:

Create your Staff profile. For training purposes, give your role Super User and Grant Administrative Privileges access. Production site access may require differing access based on your organizational role.

- Let your Implementation Specialist know when complete.



System Options

Instruction Calendar - Edit a Calendar



System Options > *Instruction Calendar*

Instruction Calendar			
			Search: <input type="text"/>
Add Term You cannot delete terms that have classes associated with them.			
Select	Term name	Status	Earliest Class start date Latest Class start date
Action ▾	Fall 2018	Active	09/01/2018 12/31/2018
Action ▾	Full Year 2018	Active	01/01/2018 12/21/2018
Action ▾	Summer 2019	Future	05/01/2019 08/31/2019
Action ▾	Spring 2019	Future	01/01/2019 04/30/2019
Action ▾	Summer 2018	Expired	05/01/2018 08/31/2018

Instruction Calendars can be built by anyone with access, however, only Power Users can modify the status of a term.

- **Active:** Indicates it is currently available for classes to be assigned.
- **Future:** Classes can be assigned to a future term and display dates will be based on those in the term.
- **Expired:** The term is no longer available for class assignment. The term stays on the list; reports from that term can still be generated.
- **Inactive:** The term dates may still be current, but the term cannot be accessed for class assignment.

Ripple Effect:

A reactivated term allows new classes to be added to it. This can affect reports that may have been created, submitted, and closed out.



System Options

Instruction Calendar - Edit a Calendar - Continued



Instruction Calendar

Search:

Add Term
You cannot delete terms that have classes associated with them.

Select	Term name	Status	Earliest Class start date Latest Class start date
Action ▾	Fall 2018	Active	09/01/2018 12/31/2018
Action ▾	Full Year 2018	Active	01/01/2018 12/21/2018
Action ▾	Summer 2019	Future	05/01/2019 08/31/2019
Edit Inactivate Change Status	Spring 2019	Future	01/01/2019 04/30/2019
	Summer 2018	Expired	05/01/2018 08/31/2018

Action Drop Down options:

Active or Future status (Those with access to the instruction calendar can modify these)

- **Edit:** This provides the options to edit details of the term. Editing the term will not automatically change existing classes associated with the term.
- **Delete:** This will only display if no classes have been associated with the term.
- **Inactivate:** If there are classes associated with the term, it can be inactivated to ensure any of those classes are still available for reporting purposes, but no additional classes can be assigned to the term.

Expired or Inactive status

- **Change Status:** This provides the ability to change the status of the term to Active. This is only available to Power Users.

To change the term status, after clicking Change Status

- Choose the applicable New Term Status (required)
- Add a reason (not required)
- Click *Submit*

Instruction Calendar: Change Term Status

* denotes required information.

Term name Summer 2018

Term Start Date 05/01/2018

Current Term Status

New Term Status *
Active
Inactive
Expired

Reason

Submit Cancel

System Options

Template Management - Email Templates



System Options > Template Management

Editable Templates		
This is a list of email and print templates that can be edited.		
Showing records 1 through 120 of 120.		
Name	Description	Action
Email and print templates		
Added to Lottery Class Waiting List	Sent to students after the lottery has run for one of their requested classes when they did not win the lottery.	Edit
Cancellation Notice - 3rd Party	Sent to the 3rd Party Payer when a class with a student that they paid for is cancelled	Edit
Cancellation Notice - Student	Sent to students when a class in which they are registered is cancelled	Edit
Class End Reminder	Emailed to student registered in an Open-Ended/Time-Limited Class a defined time before the end of the Time-Limit	Edit
Class Reminder	This note will be emailed to all students a set number of days prior to the start of a class	Edit
Class Waiting List Notification	Automatic email to student when student or staff adds Learner to Class Waiting List	Edit
Company Profile Notice	Company Profile Notice	Edit
Course Series Waiting List	Automatic email to student when student or staff adds Learner to Course Series Waiting	Edit

The number of email templates that will display will be defined by which features you activated. For example, the Lottery emails will not display if the Lottery Feature is inactive.

Template Edit: Class Reminder

*denotes required information.

Send HTML Email* Yes No

Description*

Text

(Bad Weather Text)
(Class Address 2)
(Class Address)
(Class City)
(Class Comments)

*to add dynamic text to your message please click the field above.

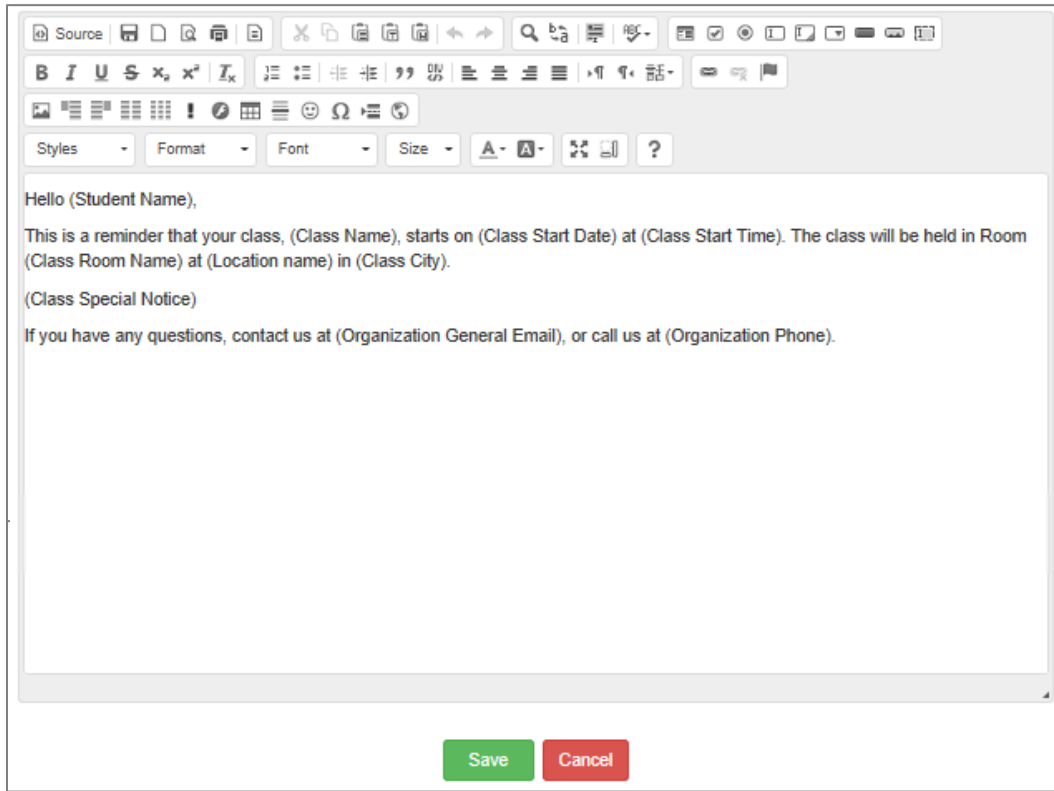
HTML email: Yes / No – If you use any HTML code or graphics, you must select Yes.

Description: This is a brief explanation of when or how the email is used in Lumens. It can be edited to clarify for your Staff.

Text: Dynamic Text (automated text) is data that is extracted from records within Lumens. The text options are different based on the email template. For example, the class confirmation email has text options based on class data.

System Options

Template Management -I Email Templates - Continued



Try It!:

Each participant should access a template to make updates. You can use the following templates. Make a minor modification, add an image, and add a dynamic text. Student Confirmation, Class Reminder, Instructor Confirmation, Instructor profile Notice.

- Let your Implementation Manager know when complete.



Questions:

Does your team have a sample communication your organization uses for things like confirmations, reminders, cancelled classes, etc.? _____

Who will have accountability to review and make updates to your templates? _____



Ripple Effect:

Dynamic text, if added to the body text, will include the city listed for the particular class based on what was entered when the class was created.

Do not change the Online Course Provider Partner email templates Steps 1-3. These steps provide specific information regarding that provider's classes, refund policies, etc.



Course Management

Courses and Classes: Edit a Category / Subcategory



Objectives for Course Management for Power Users:

- Change a course to a different Category / Subcategory and its review the impact
- Move a class to a different term

This section of the workbook focuses on the modification options for categories, subcategories, and terms only available to power users.

Course Mgmt. > Courses / Classes > **Edit Course**

Edit Course
Expand All | Collapse All

Course Information

* denotes required information.

Course Name*

Spell Check

Category Name* Subcategory Name*

Alternate Subcategories (optional, for display only)
1 selected

Click here to remove selections

- Business & Professional Development : Business Development & Entrepreneur
- Business & Professional Development : Career Development
- Business & Professional Development : Coaching & Athletics
- Business & Professional Development : Communication & Writing
- Business & Professional Development : Management & Leadership
- Business & Professional Development : Online
- Business & Professional Development : Project & IP Management

Course Number* CIP Code

Automated course numbering is a direct correlation to the assigned Category / Subcategory.

Information:

If reports have been run, moving the course to a different Category / Subcategory would produce different report results if those reports are run again. If a change is needed, new reports are recommended.



Ripple Effect:

Category / Subcategory changes affect the course number of any course listed. Therefore, the classes that are associated, and potentially reports that may be based on course numbers and/or categories and subcategories, will be affected.

When a Category / Subcategory is changed, it affects all classes associated – past, present, and future.



Course Management

Courses and Classes - Edit a Category / Subcategory - Continued



Edit Course

Expand All | Collapse All

Course Information

* denotes required information.

Course Name*

Category Name* Subcategory Name*

Alternate Subcategories (optional, for display only)
1 selected

- Business & Professional Development : Business Development & Entrepreneur
- Business & Professional Development : Career Development
- Business & Professional Development : Coaching & Athletics
- Business & Professional Development : Communication & Writing
- Business & Professional Development : Management & Leadership
- Business & Professional Development : Online
- Business & Professional Development : Project & HR Management

Course Number* CIP Code

Changing the Category / Subcategory will directly impact the course number.

If data is reviewed by Category or Subcategory, the information is affected. If you use Course numbers to identify certain revenue streams, this information will be affected.

Due to the far-reaching effects on reports, the only person(s) able to move a course to a different Category and / or Subcategory is a Power User. The change must be carefully considered. If necessary, determine what reports may be affected before you complete the change. Once the change is complete, ensure all applicable parties are notified. Document your site carefully to ensure a strong audit trail for the change.

Try It!:

Go ahead and edit a course changing the Category / Subcategory to some other option. Notice the course number change. No need to save.

- Let your Implementation Manager know when complete.



Course Management

Courses and Classes: Edit a Class Term



Course Mgmt. > **Courses / Classes** Locate the Course and click *Edit Class*

Edit Class- Applied Math(33149)

Expand All | Collapse All

Class Information

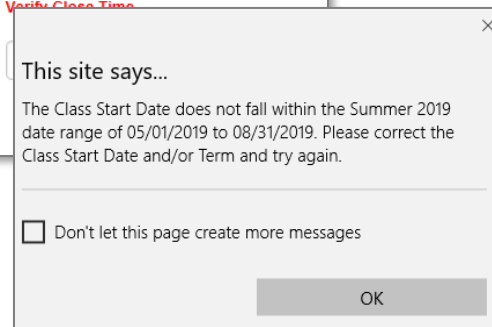
Class Schedule Information

Term*	Fall 2018	Duration (in weeks)	6	Contact Hours	48.00
Class Dates	9/17/2018 - 10/25/2018	Number of sessions	24		
Global Skip Date(s)	View	Allow Make-up Hours?	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Class Skip Date(s)	Add	<small>Skip dates only apply to Basic recurring schedule structures. Make-up Hours will be counted as replacement attendance for hours scheduled in the Basic Schedule</small>			

Occasionally, you may need to move a class from one term to another. Lumens allows Power Users to manage this function. However, if this change is made, the same class creation date rules apply (For example the class start date must be within the term dates).

Class Registration Information

Public Display starts on*	6/1/2018 12:00 AM	Public Display ends on*	9/12/2018 11:59 PM
Featured Classes display starts on		Featured Classes display ends on	
Public Registration Begins*	6/1/2018 12:00 AM	Public Registration Closes*	9/12/2018 11:59 PM
Staff Display starts on*	12/18/2017 12:00 AM	Staff Display ends on*	
Staff Registration Begins*	1/11/2018 12:00 AM		



If the dates do not fall within the new assigned term, you will get a pop-up message alerting you to which dates do not comply with the new term. You must adjust the dates to save the change.

Information:

If the class has been part of any previous reports that have been run by term, the report will be affected. We recommend a strong audit trail to support the change. You could do this by adding in the reason the term change was made in the memo field.



Registration

Cancel or Transfer - Edit a Refund Method



Objectives for Registration for Power Users:

- Review the process for editing a refund method on a cancellation or transfer

This section of the workbook focuses on the power user modification options for refund methods.

Registration > Student Management Select the student name, from the drop down **Tran History**

Transaction Date	Transaction Type	Payment Method	Transaction Amount	Action
09/01/11	Registration	Credit card	\$79.00	Print view Add memo
05/21/12	Registration	Check	\$99.00	Print view Add memo
08/13/12	Registration	3rd Party Payment: United Hospital	\$466.20	Print view Add memo
09/12/12	Registration	Check	\$141.00	Print view Add memo
03/01/13	Cancel registration	Check	\$79.00	Print view Print with memo Edit memo Edit Refund Method
03/01/13	Transfer with refund	Split	\$11.00	Print view Add memo Edit Refund Method

Access the transaction history of a student is where a Power User will locate the option to edit a refund method. Other options are available, however, those are also available to others with transaction history access.

Changing refund methods after the fact, should be done only when necessary and ensure it is completed as quickly as possible in relation to the original transaction.

If you need to edit a refund method on a past transaction, you simply click on Edit Refund Method next to transaction and select the new refund method from the drop down. Then click submit.

Ripple Effect:

Editing a refund method changes the original transaction. It does not create a new transaction. If reports have been run for the date the original transaction occurred, these reports will be impacted and should be rerun.

Be aware of refunds that applied to a credit card, these may need to be manually reviewed in the payment gateway if a change is occurring same day.



Registration

Cancel or Transfer- Edit a Refund Method - Continued



Edit Refund Method

Student Information: Tina Student
12 Main
Carterville, MN 55445

Transaction Date: 03/01/2013 9:15 AM
Transaction ID: 346
Transaction Type: Cancel registration

Original Trans. Date: 09/12/2012 9:36 AM
Original Trans. ID: 326
Original Pmt. Method: Check

Registration ID Course/Class Number Registration Name	Class Name Class Schedule Class Cost	Amount
433 260002 /3758 Student, Tina	Access II Monday, 9:00 AM - 11:00 AM; 4 sessions starting November 12, 2012, ending December 3, 2012 Refund Class cost	Check (\$89.00)
Transaction amount		Check (\$79.00)
Current Refund method		Cash (\$79.00)

Select New Refund Method:

Dropdown Menu: Check, Check, Cash, Credit Card - Terminal, Refund Request Form, Electronic Voucher

Buttons: Submit, Cancel

Completion of this function will amend the refund method on the original transaction only. It does NOT create a new transaction. It does NOT change the date on the original refund transaction.

Completion of this function will amend the refund method on the original transaction only. It does NOT create a new transaction. It does NOT change the date on the original refund transaction.

Information:

As result, the change appears on the Transaction Journal for the actual date of the cancel or transfer. Any reports or communications created prior to this moment will not change.

Credit Card refunds are not automatic when editing the refund and must be done through your credit card gateway.



Try It!:

Each participant should access a class registration they completed previously. Access the transaction history and change the method of refund.

- Let your Implementation Manager know when complete.



Reports

Custom Report Deletion



Objective for Reports for Power Users:

- Review the deletion option on custom reports

This section of the workbook focuses on report options specific to Power User roles.

Reports > **Any Custom Report**

The screenshot shows the 'Reports Home' interface. At the top, there is a search bar with the text 'Search for reports by the field below. For a complete listing, clear the search fields then press search.' Below this are three search filters: 'Name', 'Type', and 'Group', each with a dropdown menu. To the right of these filters are 'Search' and 'Reset' buttons. The main area contains a list of reports with columns for Name, Type, and Action. The 'Auditor Report' is highlighted, and its 'Delete' action is circled in red. A confirmation dialog box is overlaid on the bottom right, titled 'This site says...' with the question 'Do you want to delete?' and 'OK' and 'Cancel' buttons.

Name	Type	Action
my favorites	Type	Action
my recent reports	Type	Action
accounts receivable	Type	Action
admin mgmt	Type	Action
catalog mgmt	Type	Action
class mgmt	Type	Action
Auditor Report	Custom	Run / Schedule Edit Delete Add to my favorites
Calendar Info for Outlook	Custom	Run / Schedule Edit Delete Add to my favorites
Calendar Schedule	Custom	Run / Schedule Edit Delete Add to my favorites
CDL Attendance for non hires	Custom	Run Edit Delete Add to my favorites
Class Attendance	Standard	
Class Attendance - Expanded	Standard	
Class completion	Standard	

When custom reports are created, the owner, (the individual who created the report), can delete and modify the report, as well as a Power User.

A Power User can access and delete all public viewable custom reports. However, if the report is set as private, the Power User cannot see the report, therefore, cannot delete it.

We do not recommend creating private reports unless necessary.

Knowledge Review

System Options Review

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

Objectives for System Options:

- Update and review the Power User view
- Add a Staff Member to Lumens
- Review changing the status of a term in the Instruction Calendar
- Update Email Templates



To complete this review, use the *System Options Module* as a resource.

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

The Power User can modify a _____ on a staff profile.

There can be an _____ number of refund policies created.

A Power User can modify the _____ after a class start date that a class will be available for late registrations and cancels or transfers.

Power Users can set _____ expiration days.

The _____ allows a person processing a refund to modify the refund amount (up or down) by the amount set in the field.

Class reminders can be set to be sent at both the _____ and a certain number of days _____ class start.

Knowledge Review

Advanced System Options Review Key

Review answer key:



The Power User can modify a User Role on a staff profile.

There can be an unlimited number of refund policies created.

A Power User can modify the number of days after a class start date that a class will be available for late registrations and cancels or transfers.

Power Users can set password expiration days.

The maximum override variance allows a person processing a refund to modify the refund amount (up or down) by the amount set in the field.

Class reminders can be set to be sent at both the class confirmation and a certain number of days before class start.

Additional Resources:

*Customer Support > Document Center > Quick Reference Aids > **Refund Policy Set Up***



Knowledge Review

Course Management Review

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

Objectives for Course Management:

- Change a course to a different Category/Subcategory and its impact
- Move a class to a different term



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



The _____ is affected when a course is changed from one category and / or subcategory to another.

If you have any reports that are based on _____ you want to check into the data affects BEFORE making a change to the category and / or subcategory.

If a term is changed on an existing class, the class _____ must be consistent with the new term's class date requirements.

A category / subcategory change effect all _____, past, present and future.

Knowledge Review

Course Management Review Key

Review answer key:



The automated course numbering is affected when a course is changed from one category and / or subcategory to another.

If you have any reports that are based on course number or category/subcategory you want to check into the data affects BEFORE making a change to the category and / or subcategory.

If a term is changed on an existing class, the class dates must be consistent with the new term's class date requirements.

A category / subcategory change effect all classes, past, present, and future.

Additional Reference: *Customer Support > Document Center > Quick Reference Library > **Categories, Subcategories and Course Numbers***



Knowledge Review

Registration & Reports Review

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

Objectives for Registration and Reports Modules:

- Review the process for editing a refund method on a cancellation or transfer
- Review the deletion option on custom reports

To complete this review, use the *Registration and Reports Module* as a resource.

- The review has four questions (multiple choice or True / False).
- Answer the questions to the best of your knowledge.
- Compare your responses against the answer key (how did you do?).



1. The following occurs when editing a refund:

- A new transaction is created
- A new date is applied to the transaction
- The new refund method, if credit card, will process automatically
- The original transaction is changed

2. **T/F:** A Power User can delete any existing reports.

3. **T/F:** A new refund method should be tracked and documented to ensure a clear audit trail.

4. When a refund is modified, previously run reports will _____.

- Not be impacted
- Be Incorrect and should be re-run
- Be correct as the new method will be updated
- None of the above

Knowledge Review

Registration & Reports Review Key



Review answer key:

Expected Results	Related Information
The following occurs when editing a refund: <ul style="list-style-type: none">○ The original transaction is changed	<i>This process does not create a new transaction and should be done with caution.</i>
F: A Power User can delete any existing reports.	<i>False – A power User can delete custom public reports.</i>
T: A new refund method should be tracked and documented to ensure a clear audit trail.	
When a refund is modified, previously run reports will _____. <ul style="list-style-type: none">○ Be Incorrect and should be re-run	<i>Any previously run reports that may have this refund information should be rerun to ensure accuracy.</i>



Additional References: *Customer Support > Document Center > Lumens Lite > **Refund it Right***

