Augusoft®

Lumens Power User for Lumens iPRO

*System Set Up and Modification Options*

# Contents

# 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

| Highest Administrative Access Level | | POWER USER | May be assigned to ANY Staff Member to enhance User Role | | |
|---|---|---|---|---|---|
| **MENU ACCESS** | **Sub Menu Access** | | **SUPER USER** *WITH Grant Administrator Priveleges* | **SUPER USER** *WITHOUT Grant Administrator Priveleges* | **STAFF MEMBER** *Select Menus as assigned by User Role* |
| 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** | | | |
| | Instrucional 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.

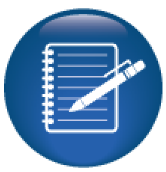
<u>Additional Resources:</u>

This grid is available online.

*Customer Support > Document Center > Quick Reference Library > **User Access Grid***

There are several icons used in the manuals. Each icon has a visual value:

**I Wish Lumens Could…** Lumens thrives on user feedback to influence new features and updates – indicates an area where you may be able to think about what else Lumens can do for your program.



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

**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.

**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).

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

**Questions** indicates questions for review and also to frame thought about the way you will setup your site.

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

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

# System Options

## Power User Settings

iPRO PRO CLTV STND

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***

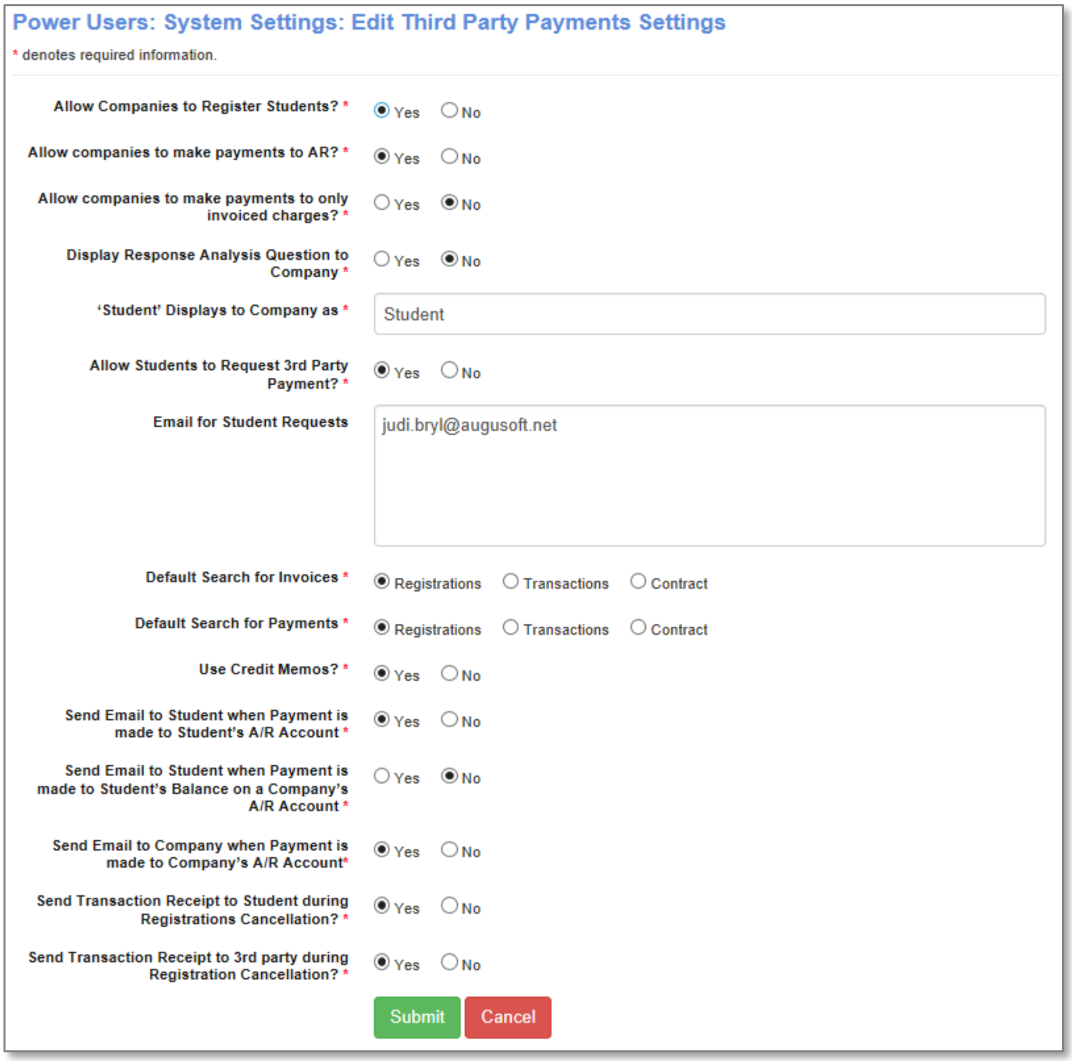
*System Options > **Power User***

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 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 * | Student |
| Allow Students to Request 3rd Party Payment? * | (•) Yes ( ) No |
| Email for Student Requests | judi.bryl@augusoft.net |
| 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 |

Submit Cancel

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

Additional References:

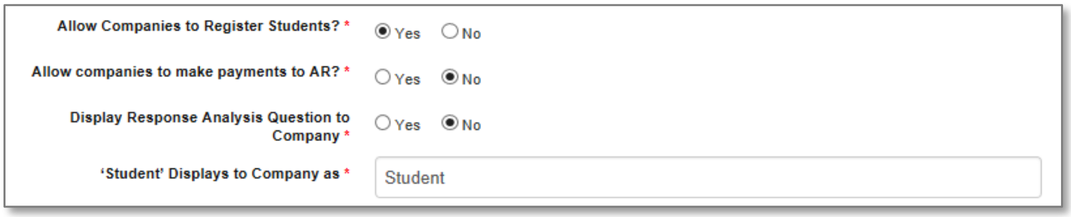
*Customer Support > Document Center > Lumens Lite >* ***3rd Party Payment Settings***

# System Options

## Power User Settings – 3rd Party Payment Settings - Continued

iPRO PRO

For Company:


Allow Companies to Register Students? * Yes No
Allow companies to make payments to AR? * Yes No
Display Response Analysis Question to Company * Yes No
'Student' Displays to Company as * Student

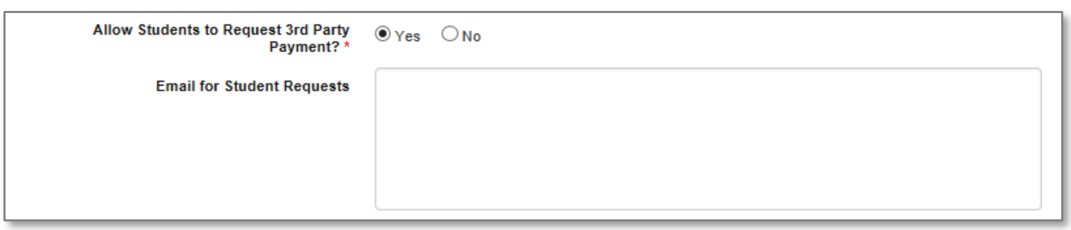
**Allow Companies to register students?:** Allow Companies to register students associated with their company. This can be inactivated at the company level.

**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? * Yes No
Email for Student Requests

**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.

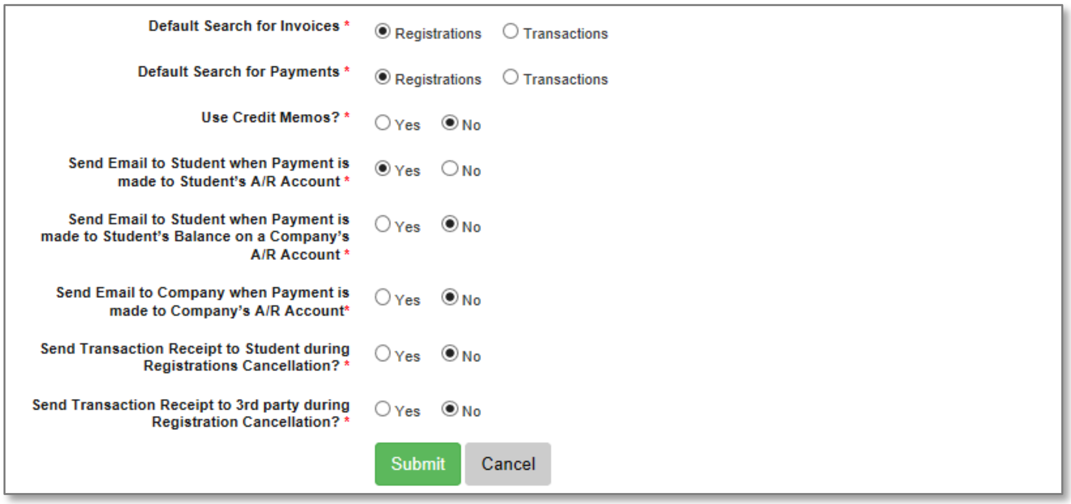
**Email for Students Requests:** If the above is activated, this is the email address that will receive the request at the school.

# System Options

## Power User Settings – 3rd Party Payment Settings - Continued

iPRO PRO

For Staff:




**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

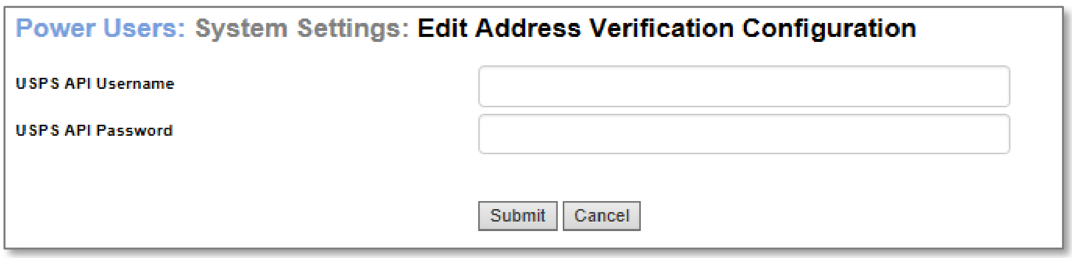
## Power User Settings – Address Verification

iPRO PRO CLTV STND

*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.



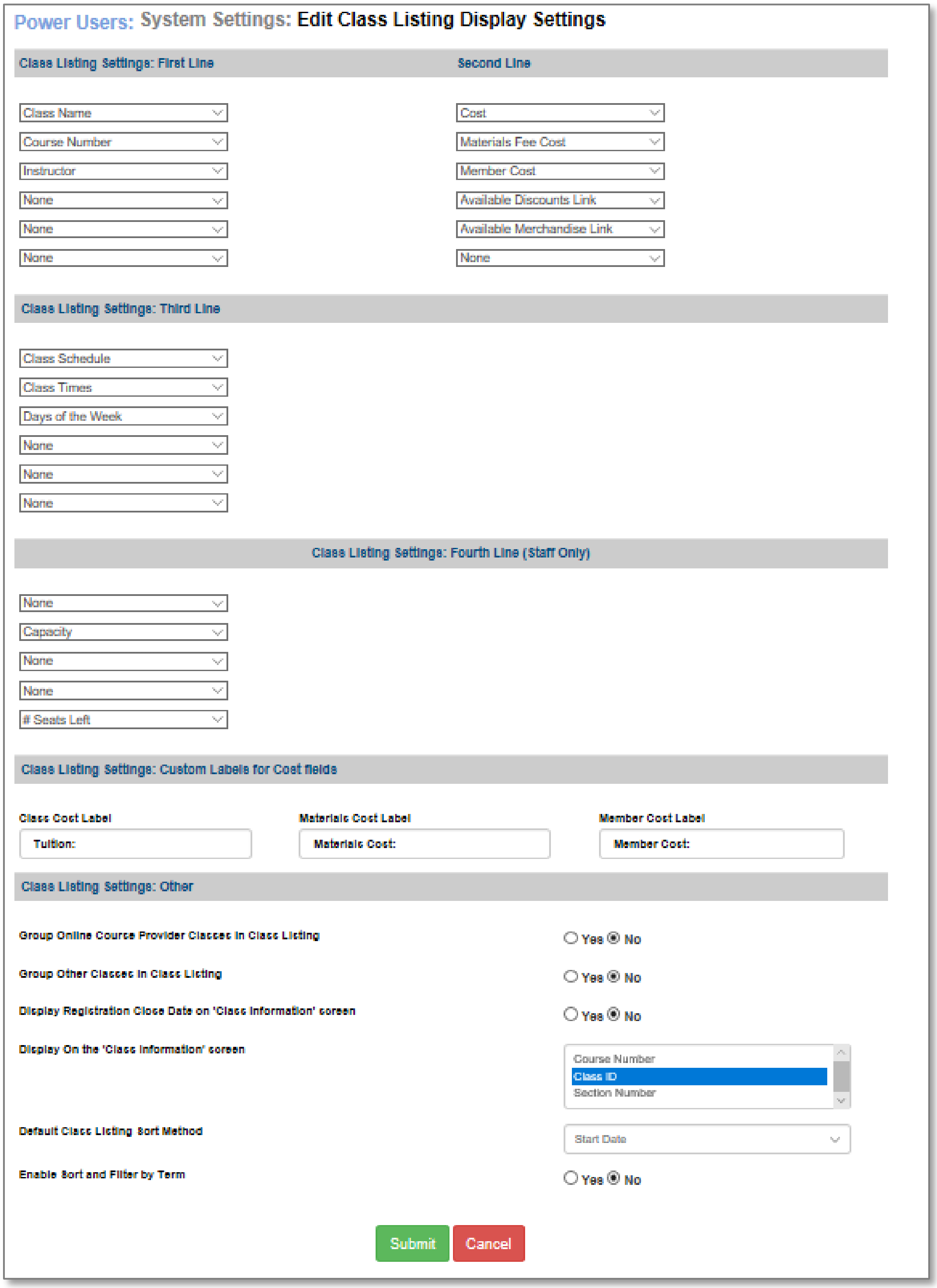

You must first request access to the Address Information API from the USPS. Once you have that you can set it all up here by choosing *Edit* from the Address Verification Configuration section of Power User settings.

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.

<u>Additional References:</u>

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

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




These fields define what displays and in what order.

Lables

Default settings

# System Options

## Power User Settings – Class Listing Display - Continued

iPRO PRO CLTV STND

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

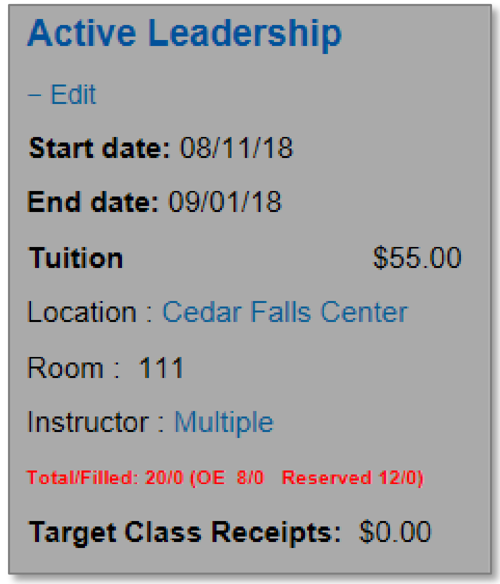
- Class Start Date
- Class End Date
- Cost

Line 3

- Location
- Classroom
- Instructor
- Course URL

Line 4 (Staff view only)

- Total / Filled Seats
- Internal Comments
- GoNumber



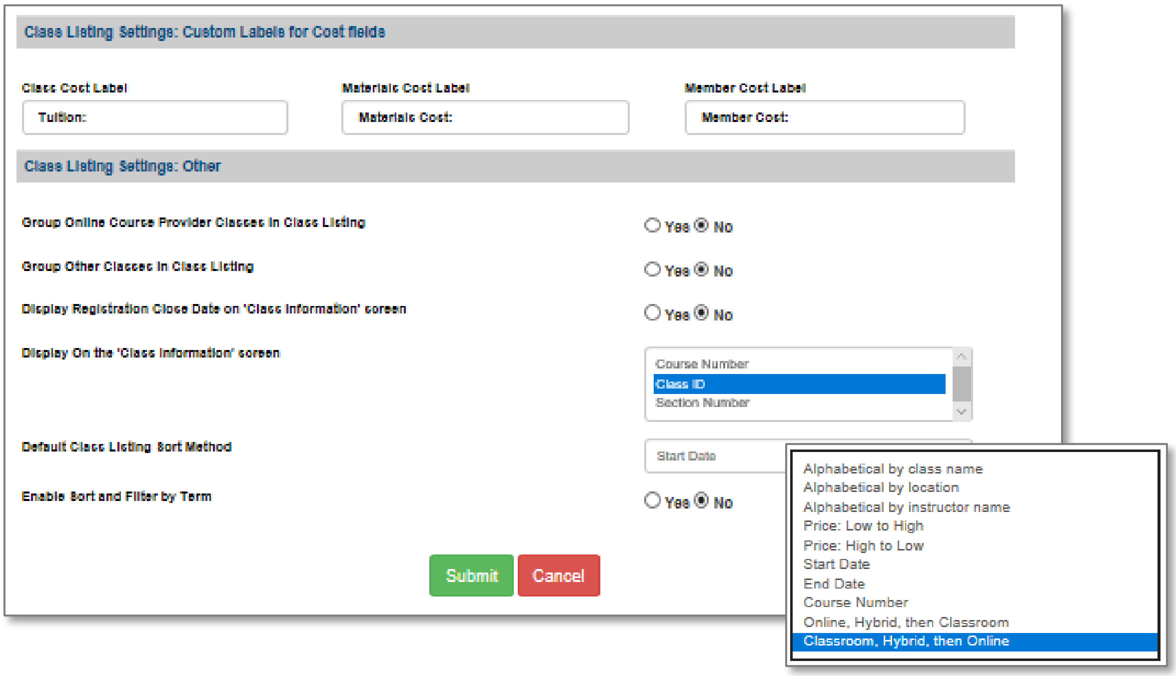

Line 1-3 Examples:

- 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

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.

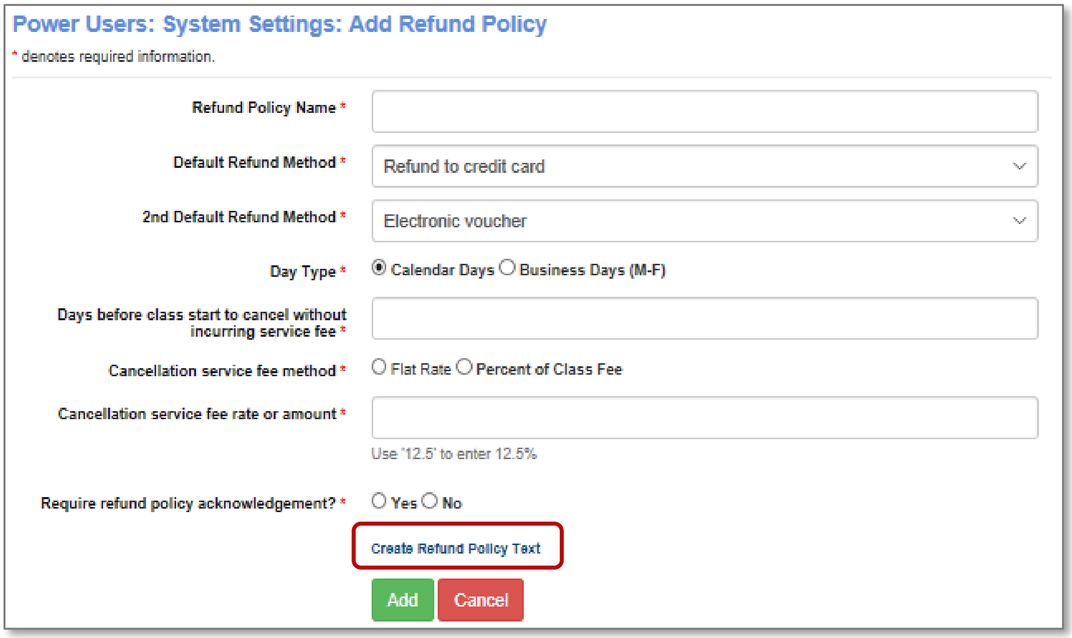
**Enable Sort and Filter by Term:** Choose *Yes* or *No*.

# System Options

## Power User Settings – Class Refund Policy Mgmt.

iPRO PRO CLTV STND

*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.

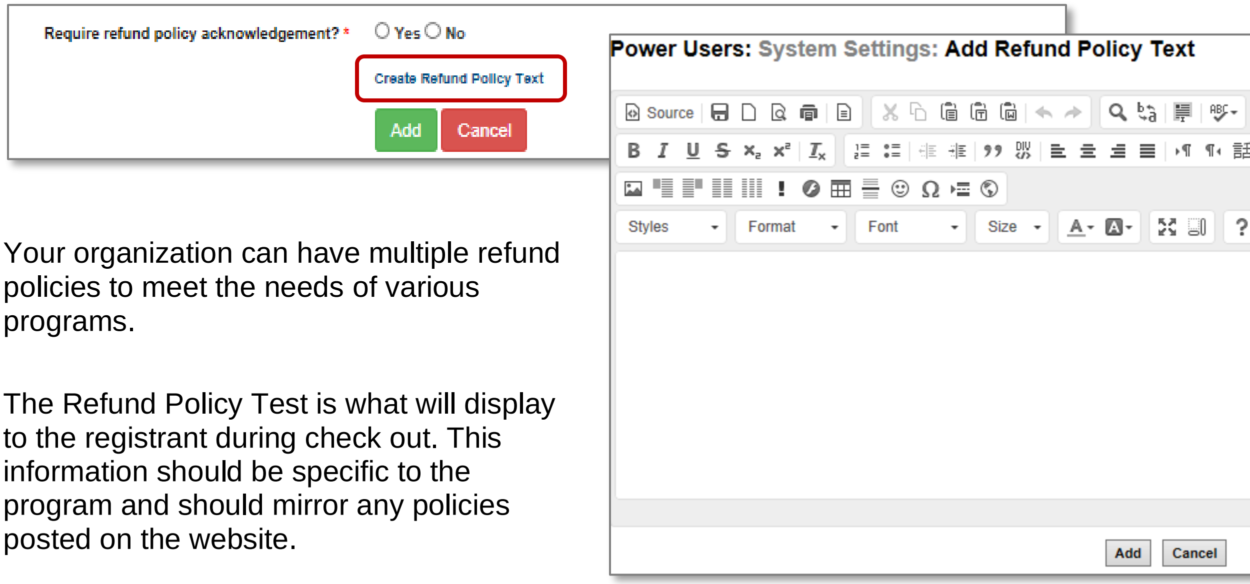
**Day Type:** This is the number of days before the system will calculate a service fee.

**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.




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.

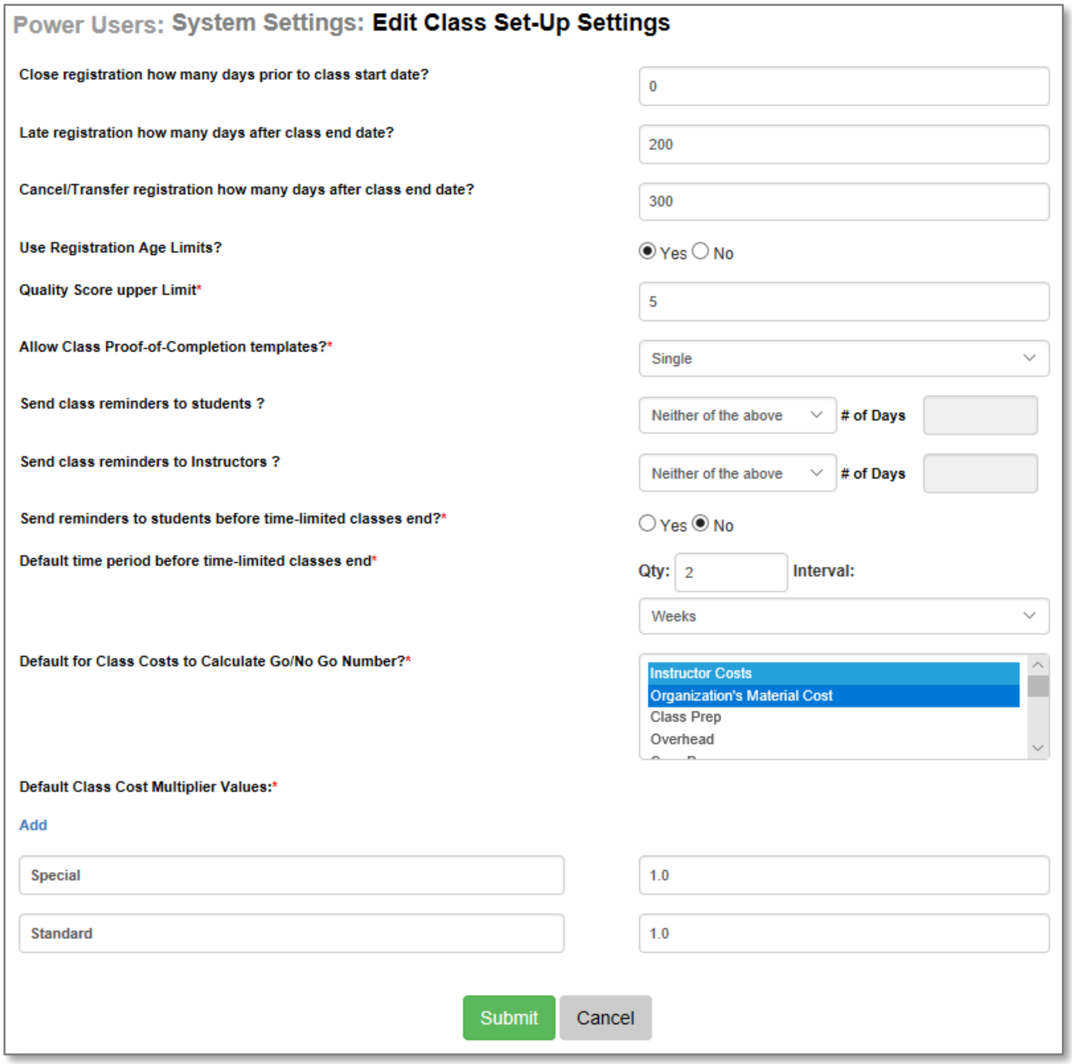
<u>Try It!:</u>

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*** Select *Class Set-up Settings.*


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

Close registration how many days prior to class start date? 0

Late registration how many days after class end date? 200

Cancel/Transfer registration how many days after class end date? 300

Use Registration Age Limits? Yes No

Quality Score upper Limit* 5

Allow Class Proof-of-Completion templates?* Single

Send class reminders to students ? Neither of the above # of Days

Send class reminders to Instructors ? Neither of the above # of Days

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

Default time period before time-limited classes end* Qty: 2 Interval: Weeks

Default for Class Costs to Calculate Go/No Go Number?* Instructor Costs, Organization's Material Cost, Class Prep, Overhead

Default Class Cost Multiplier Values:*

Add

Special 1.0

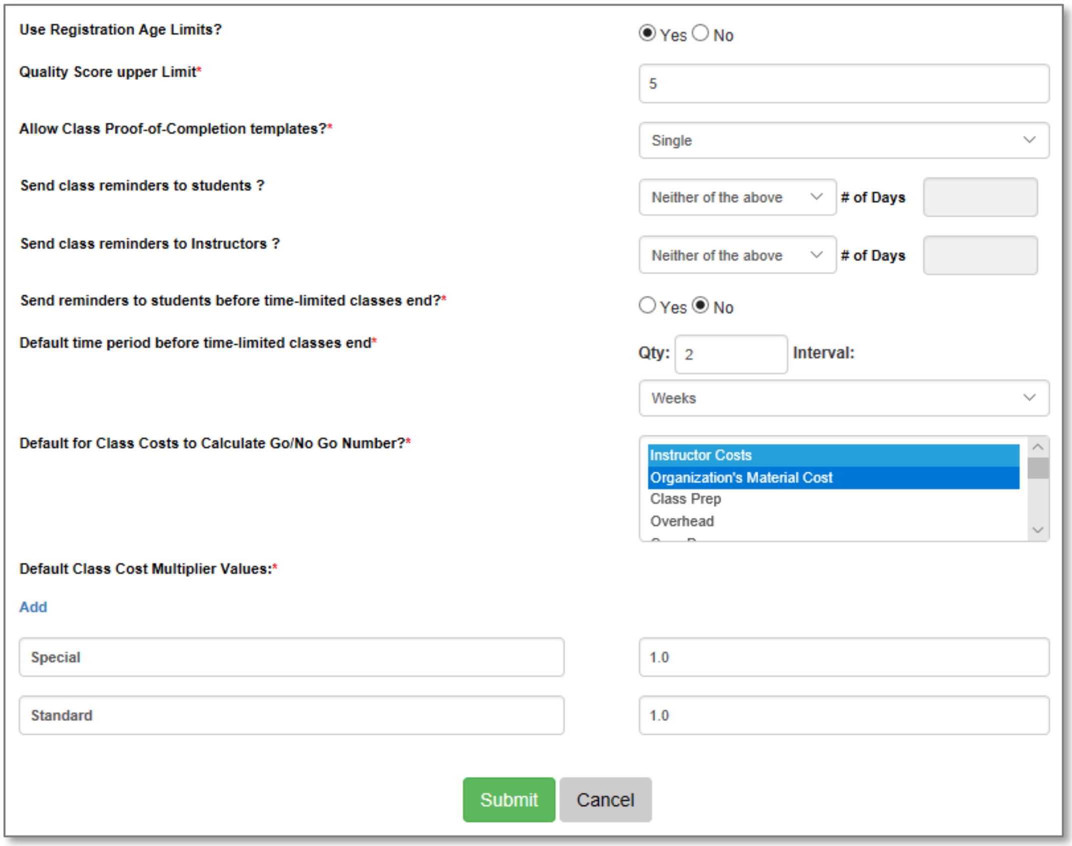
Standard 1.0

Submit Cancel

**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.




**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.

<u>Additional Reference:</u>
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

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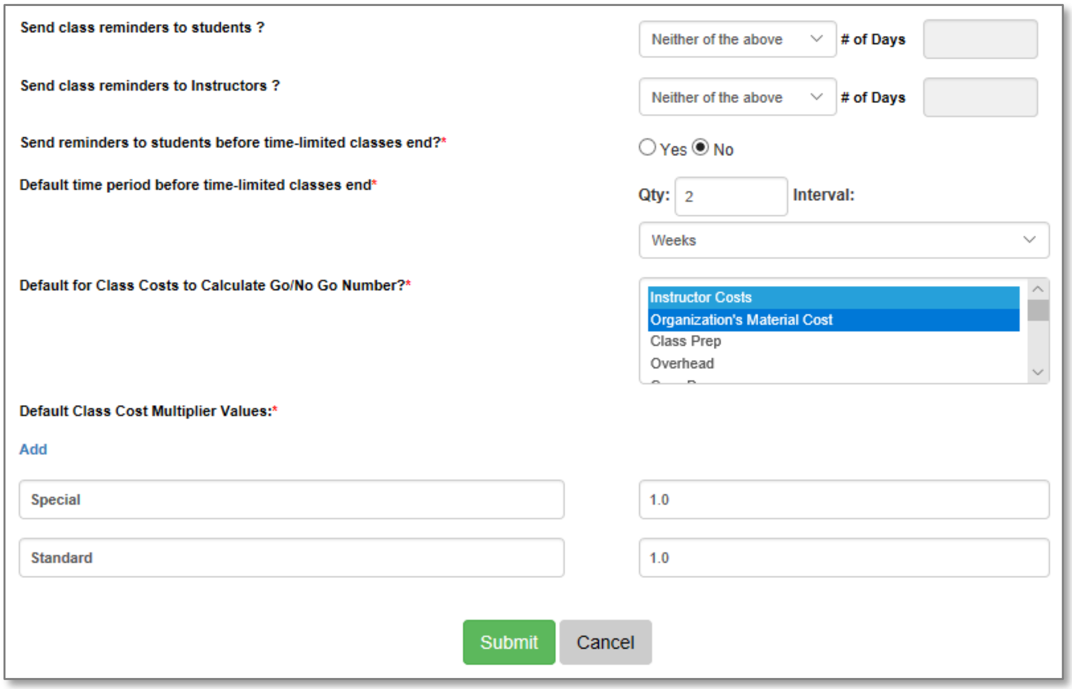
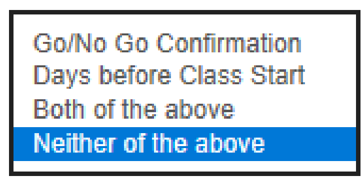



**Send class reminders to…?:** Both Instructors and students have this option. You can choose when reminders are sent out to Students after registration.

- **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.

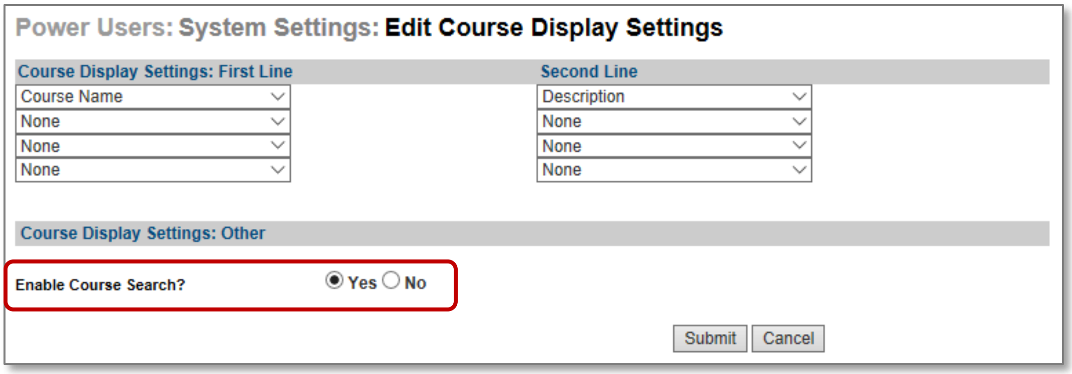



**Send Reminders to students before time-limited classes end?:** This defines if reminders will be sent and if set to *yes*, the Quantity and Interval prior to the classes end date is also set.

**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* ***Course Display Settings***




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.

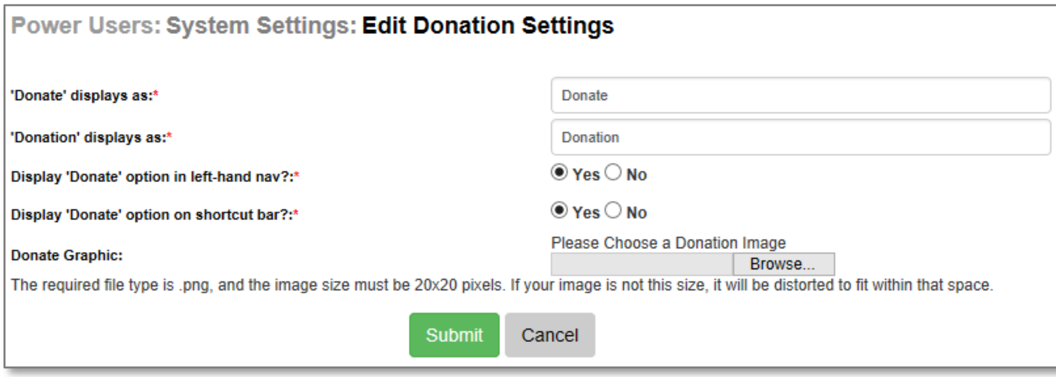
**Enable Course Search**:
If the Course Search feature is used, when a student searches for a Class and no active Classes are found, *Courses* are also searched and will be displayed so the student knows that the Course may be available at a different time and can receive notification next time it is 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.

# System Options

## Power User Settings – Donation Settings

iPRO PRO CLTV STND

*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.

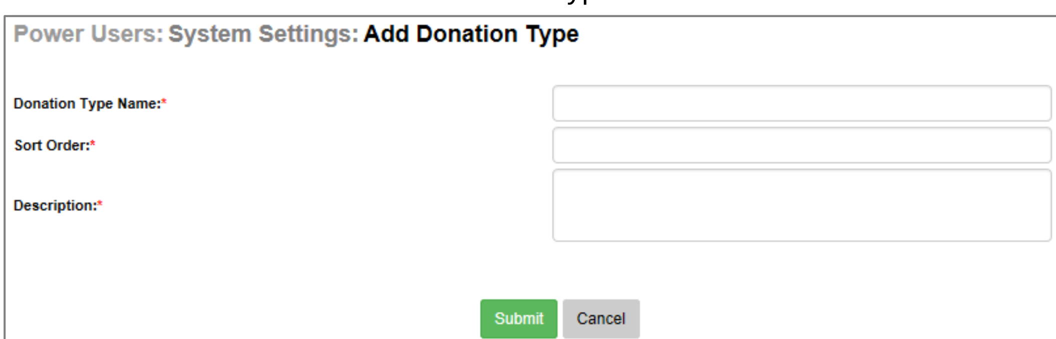
**Donate / Donation displays as:** This provides the option to modify the term donation to what fits your organization.

**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.



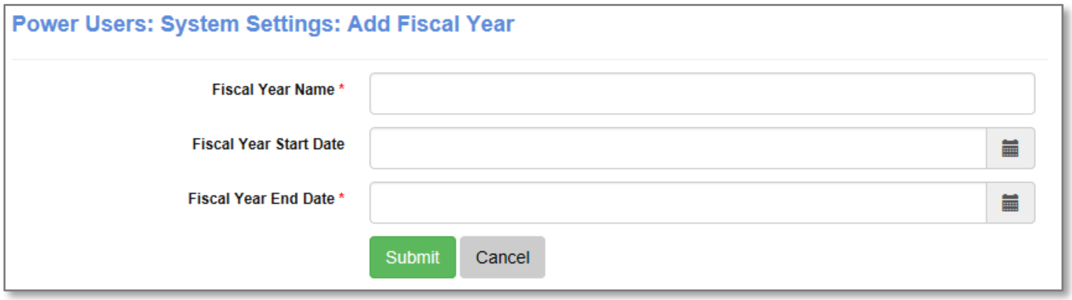

**Donation Type Name:** When more than one is built, provides a drop-down list.
**Sort Order:** Identifies where in the drop down list this type will display.
**Description**: Provide a description to ensure it is clear the purpose of each donation type.

# System Options

## Power User Settings – Fiscal Year Management

iPRO PRO CLTV

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




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:

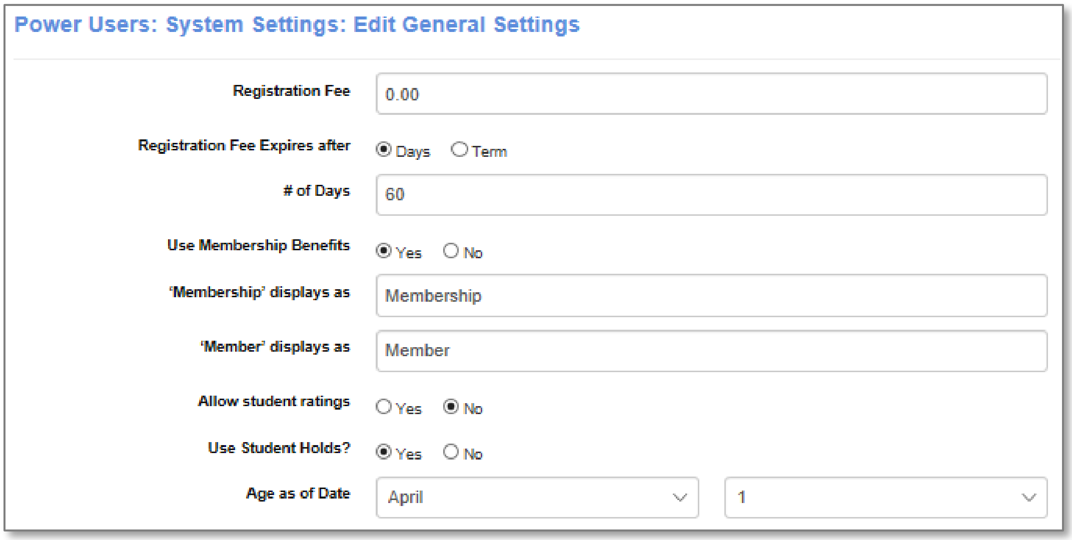
- Deferred Revenue
- Tuition Listing Report

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.

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Lumens iPRO Customer Information

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

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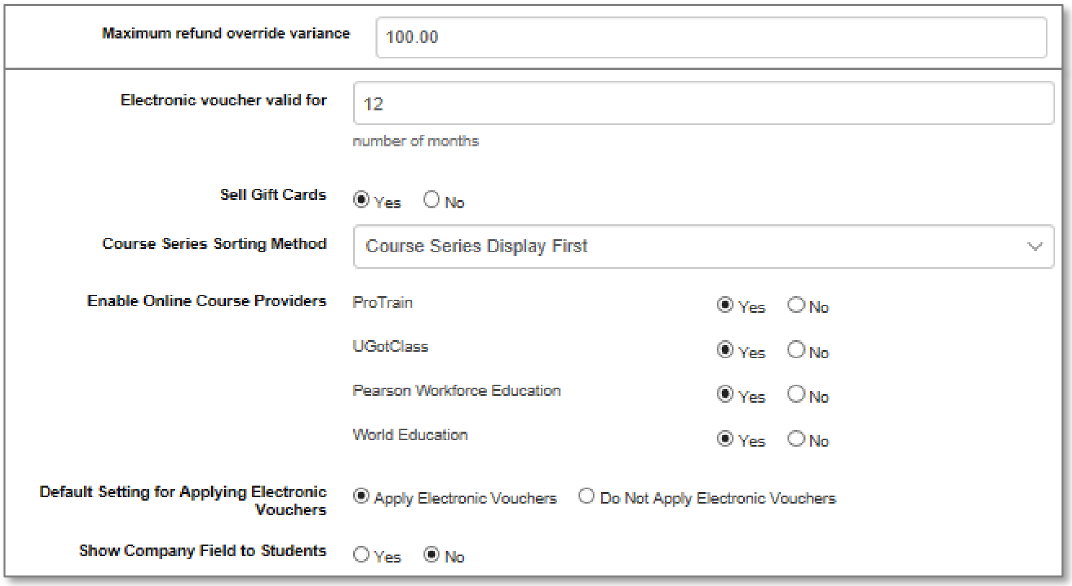
# System Options

## Power User Settings – General Settings - Continued

iPRO PRO CLT STN




**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.

**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.

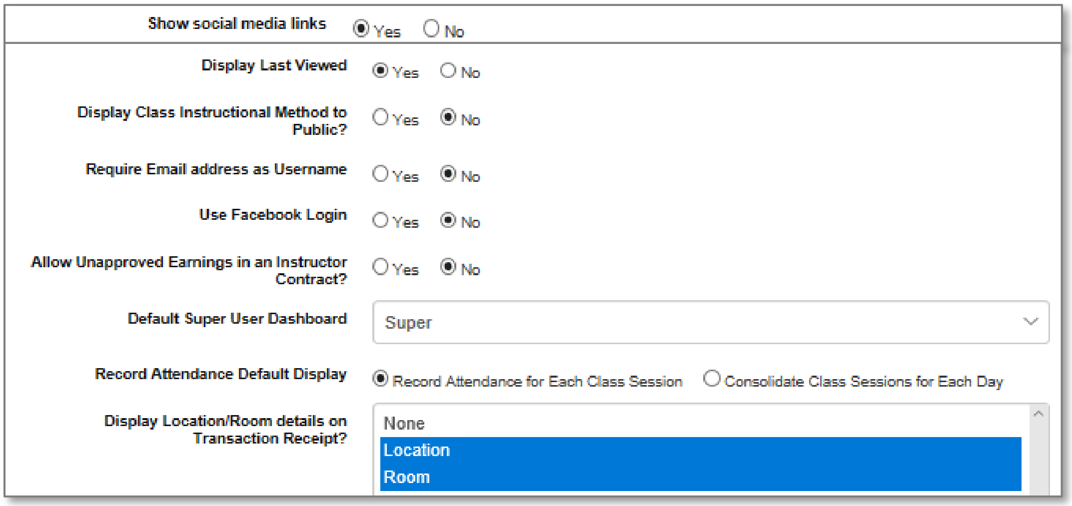
**Show Company Field to Students:** If *Yes*, provides a company drop down list for students to self-assign. The drop-down list is based on the company profiles created in your site.

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

iPRO PRO CLTV STND




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

**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.

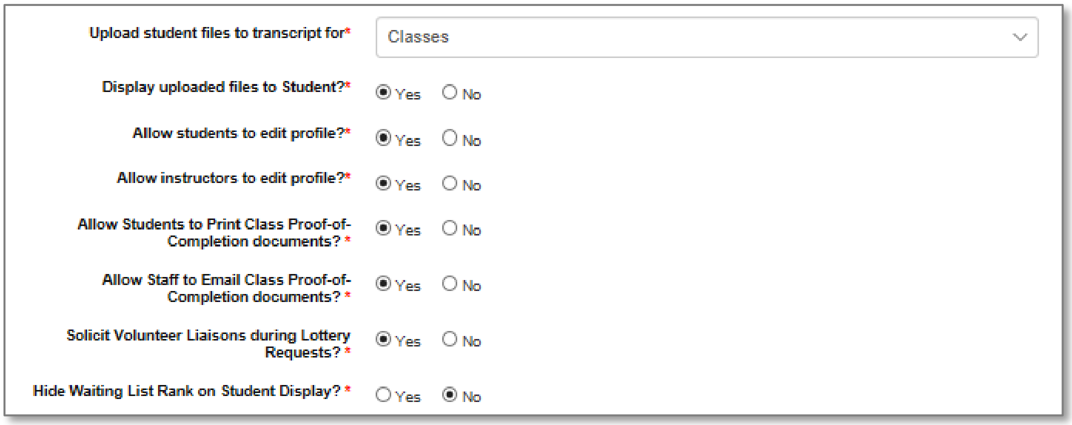
**Allow Unapproved Earnings in Instructor Contract?:** This applies to organizations using Instructor Contracts.

**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.

<u>Additional Reference:</u>
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***




**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.

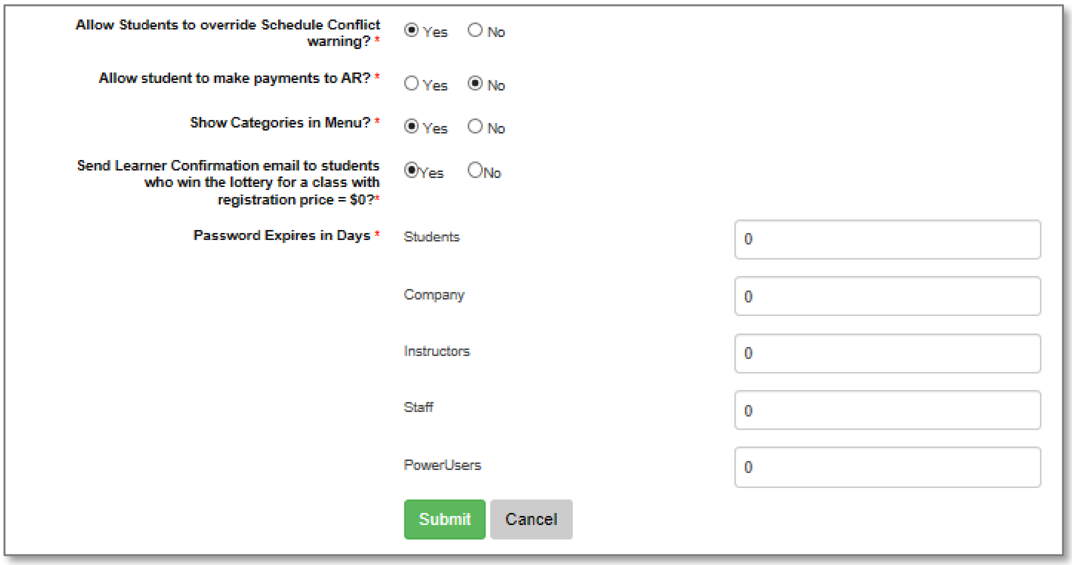
**Allow Students to Print Class Proof-of-Completion documents?:** A link is provided for the student on their transcripts. The document can also be printed by staff if no is chosen.

**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.

<u>Additional Reference:</u>
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***




**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.

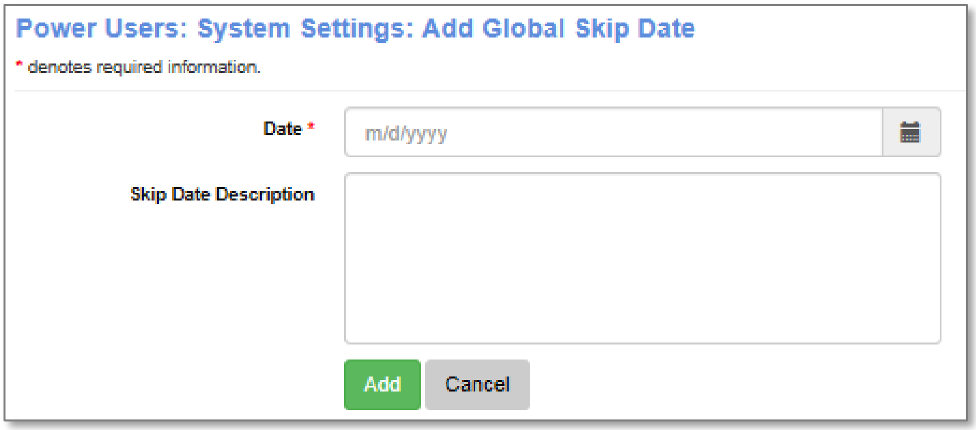
<u>Retention Activity:</u>
Several of the General Settings will require conversations throughout your organization. Document the top three that should be reviewed in the next 3-5 business days.

______________________________________________

______________________________________________

______________________________________________

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




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.

<u>Try It!:</u>
Work together and each add an applicable skip date (For example: Thanksgiving, Labor Day, etc.):

- Let your implementation specialist know when complete.

<u>Retention Activity:</u>
Assign one person in your group to add several Global Skip Dates to your site before the next training session.

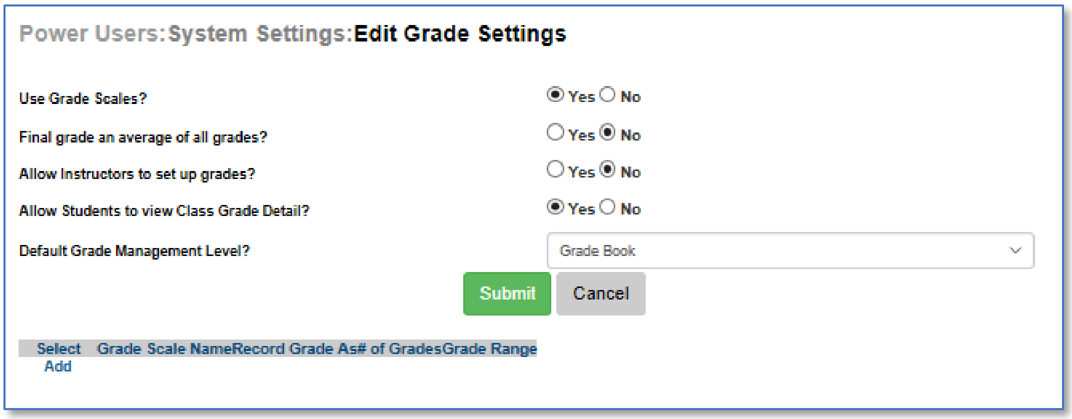
<u>Ripple Effect:</u>
Global Skip Dates affect your class schedule. Any time a class meeting conflicts with a Global Skip Date a pop-up message appears. The message is a notification that allows the creator the option to override and schedule the class that day any way or not to use the date (which may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

# System Options

## Power User Settings – Grade Settings

iPRO PRO

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




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

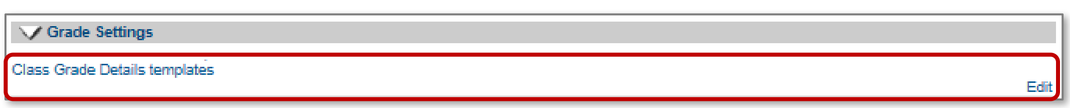
**Use Grade Scales:** The option to create grade scales display

**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.

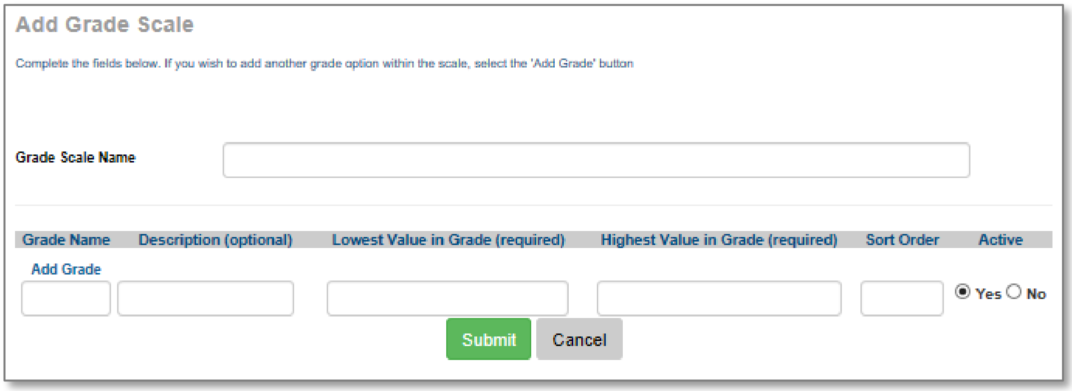
**Default Grade Management Level?:** The options are: None, Record Grades, or Gradebook. This is the default set in each class, however can be adjusted at each course creation.




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

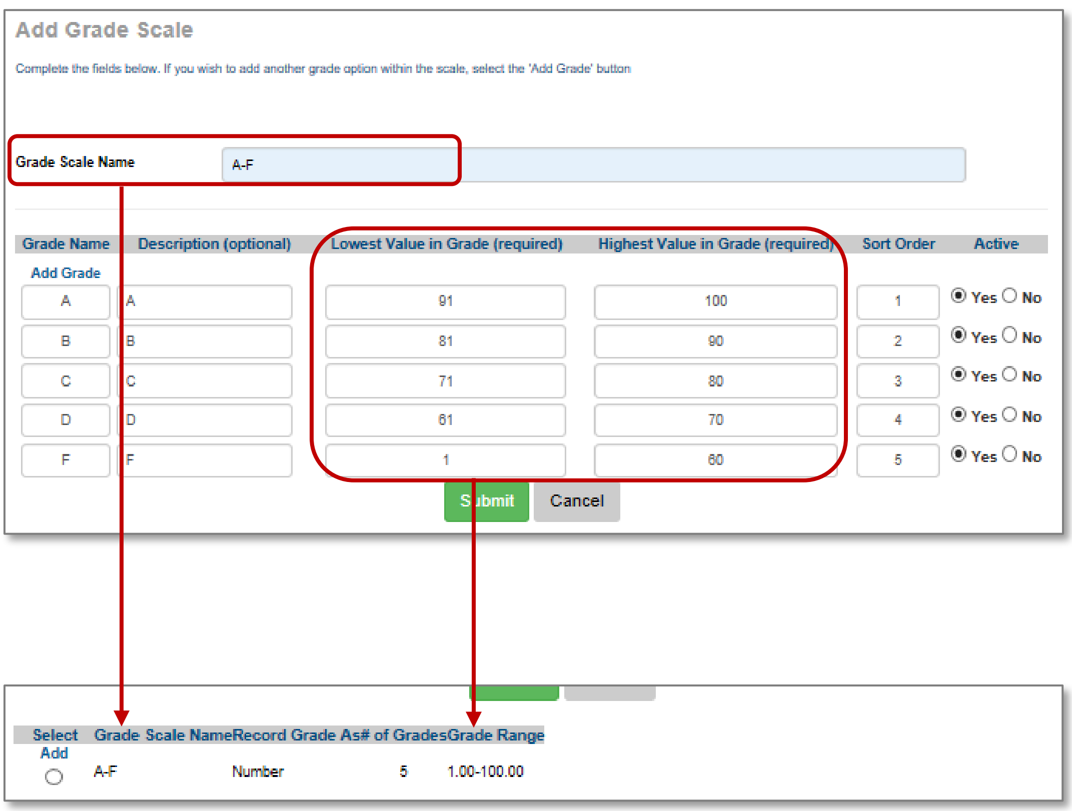
Additional Reference:

If you wish to use Gradebook, additional Quick References are available.
*Customer Support > Document Center > Quick Reference Library >* ***Gradebook, Using Gradebook,*** *and* ***Document Editor***

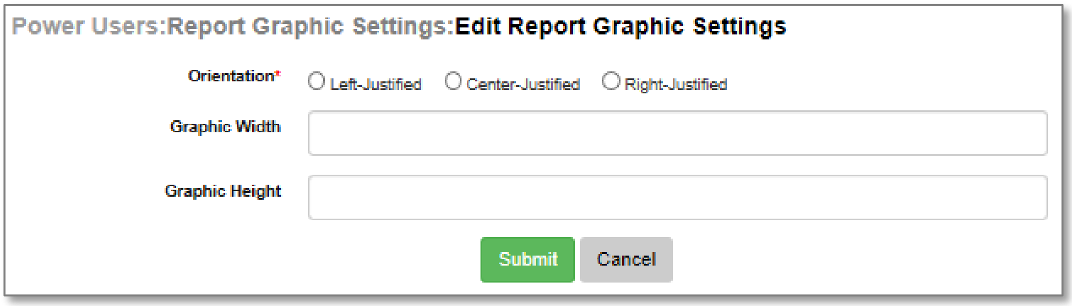



**Grade Scale Name:** This will be listed in the grade scale drop down at Course and Class creation.

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.

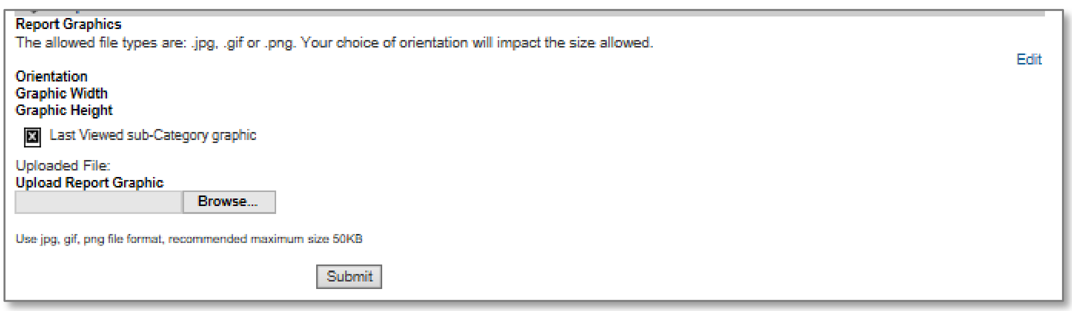


*System Options* > ***Power User*** Click on *Graphics*




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.



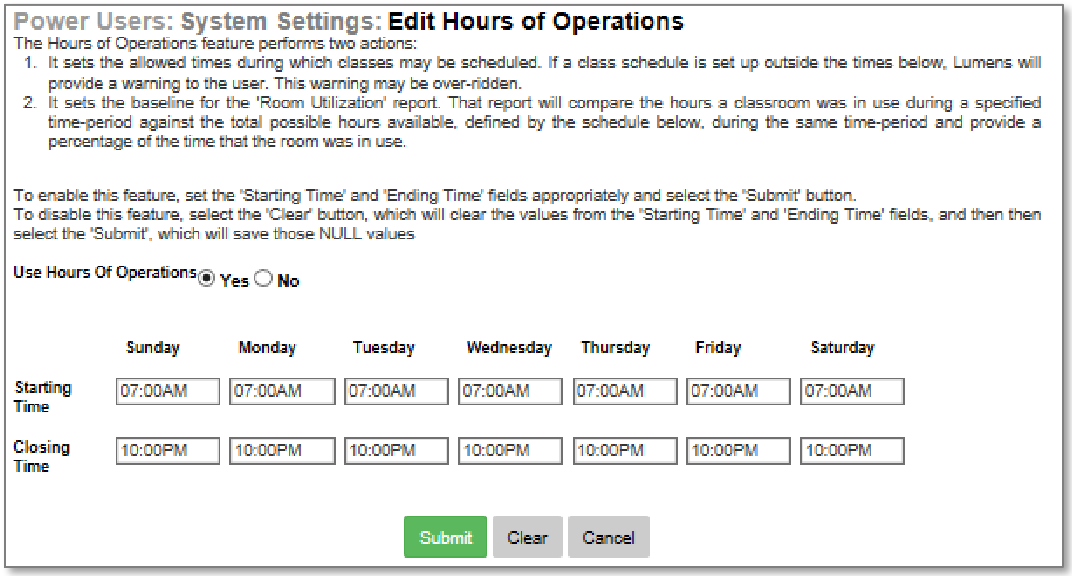

You can upload a variety of image types, JPG, .GIF, .PNG. The maximum size of the image should be no more than 50KB.

<u>Ripple Effect:</u>
This image will display on all reports generated in Lumens but can be suppressed at the report run / schedule page.

<u>Questions:</u>
Do you traditionally have a logo or organizational image included in reports to send to other areas?

___

*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 |

Submit Clear Cancel

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.

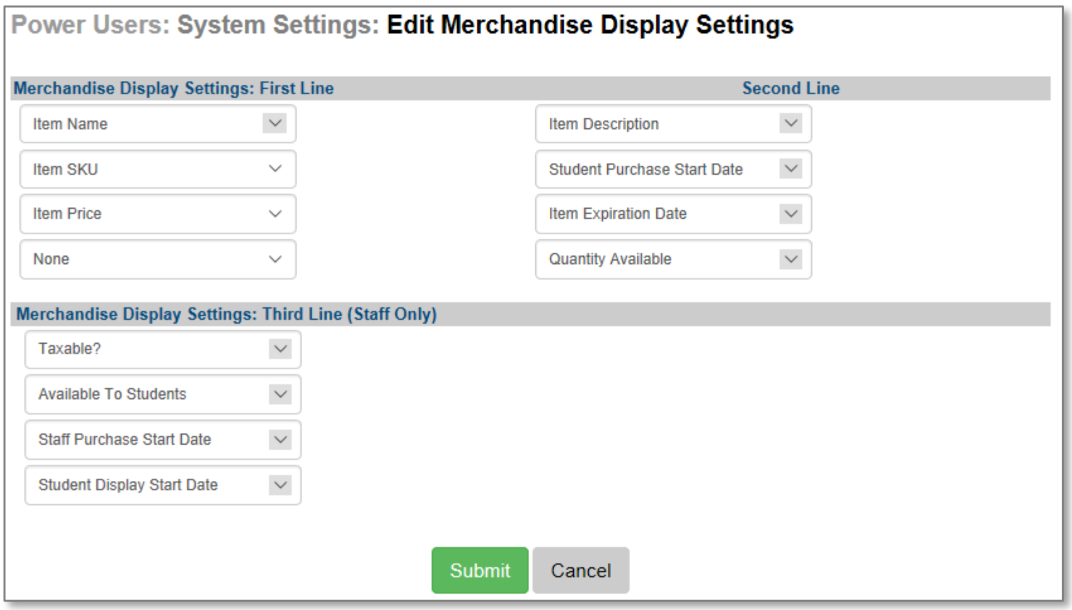
# System Options

## Power User Settings – Merchandise Settings

iPRO PRO

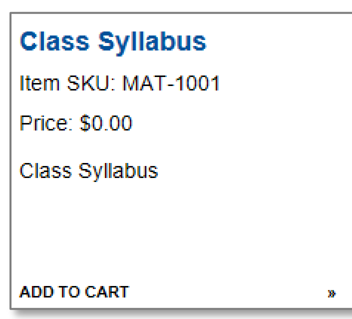

These options only display if the Merchandise feature is active.

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




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

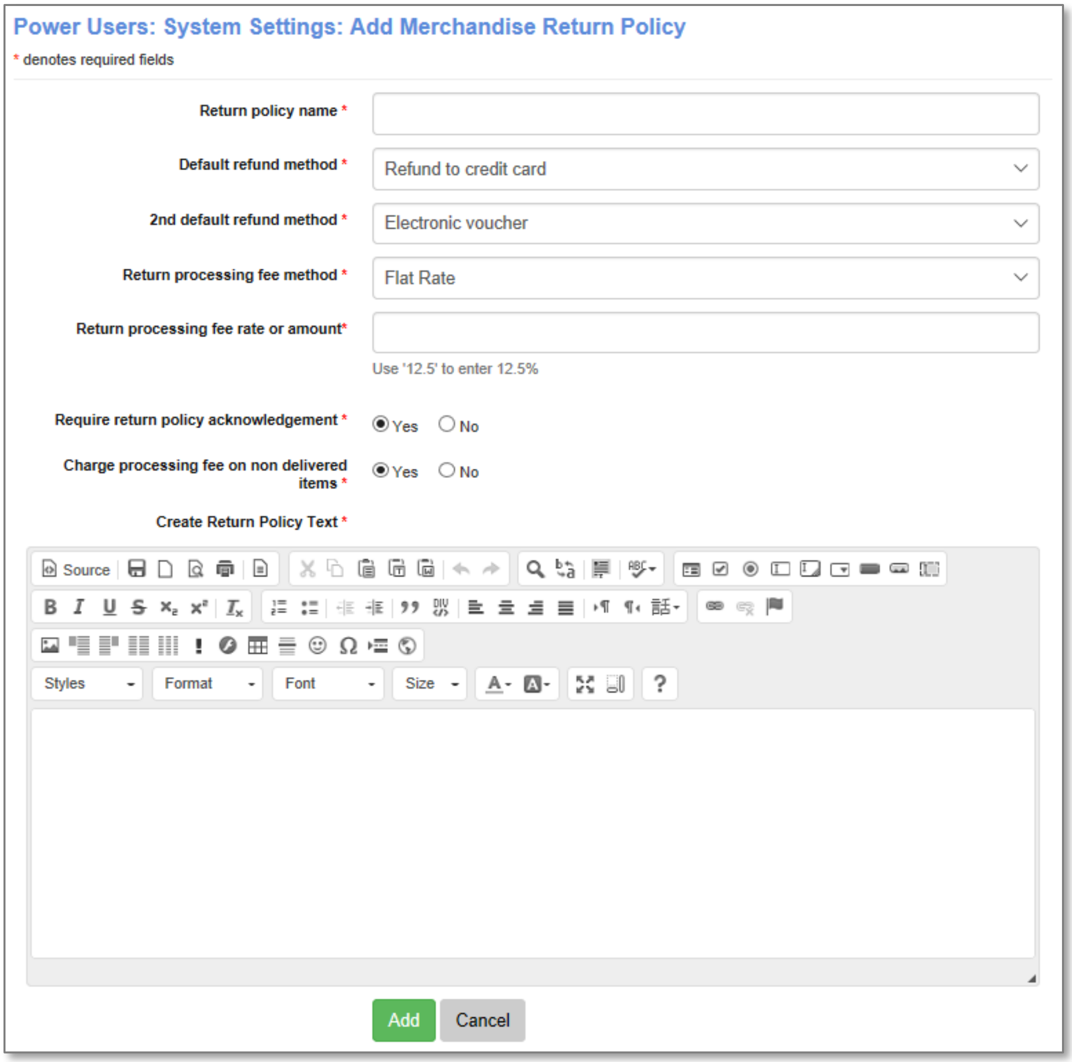


# System Options

## Power User Settings – Merchandise Settings - Continued

iPRO PRO

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




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.

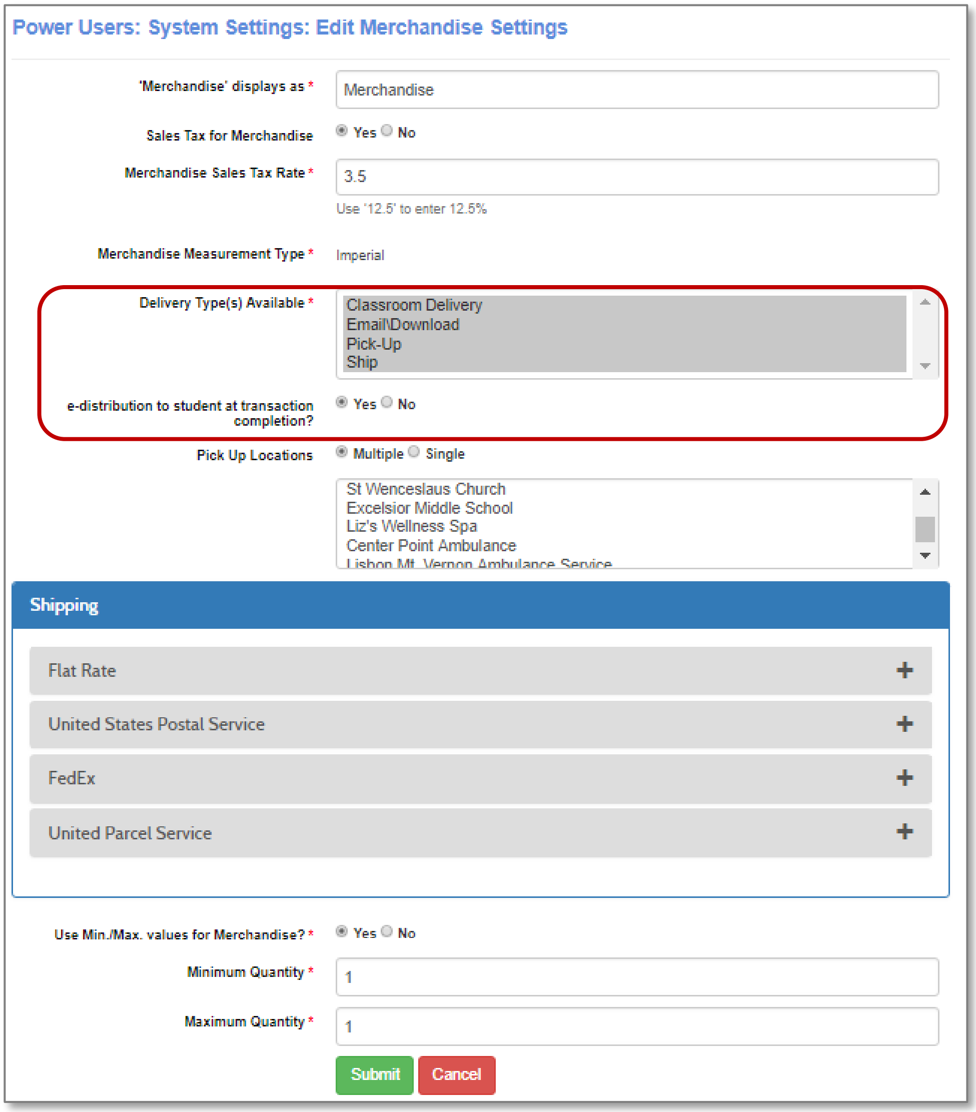
**Create Return Policy Text:** This HTML template is the same used in the refund policy text.

# System Options

## Power User Settings – Merchandise Settings - Continued

iPRO PRO

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




Name can be modified.

Choose Sales Tax Rate and list.

Set applicable delivery options.

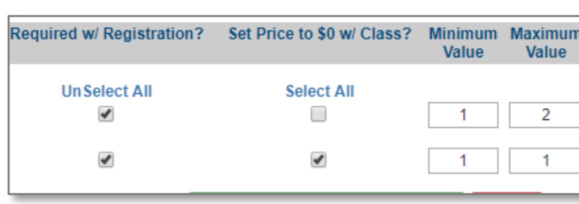
Pick Up Locations allow a single or multiple location available for selection.

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.

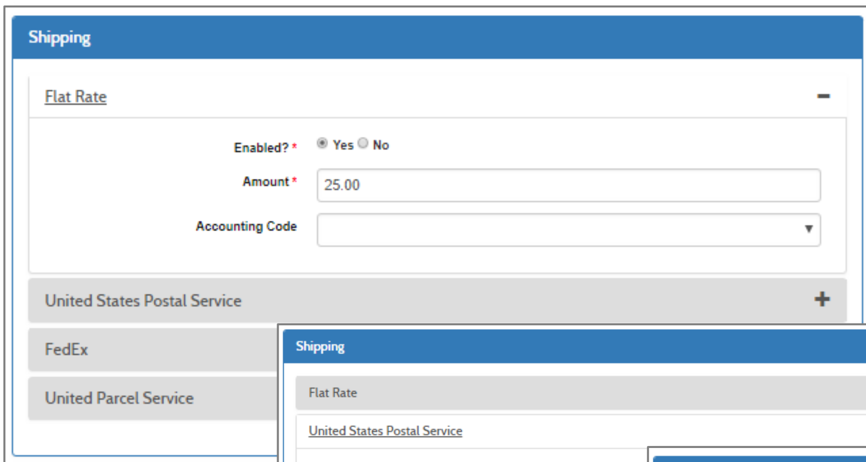


For Delivery Type(s) Available to display, configuration must include shipping.

**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.

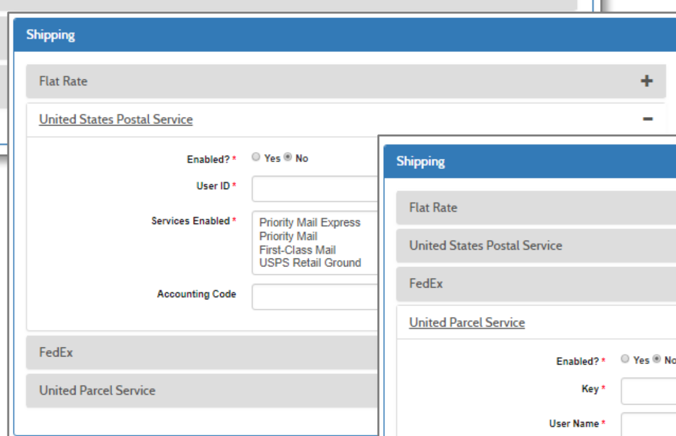
**Pick Up Locations:** Identify single or multiple pick up locations and choose locations (defaulted from pre-defined list).

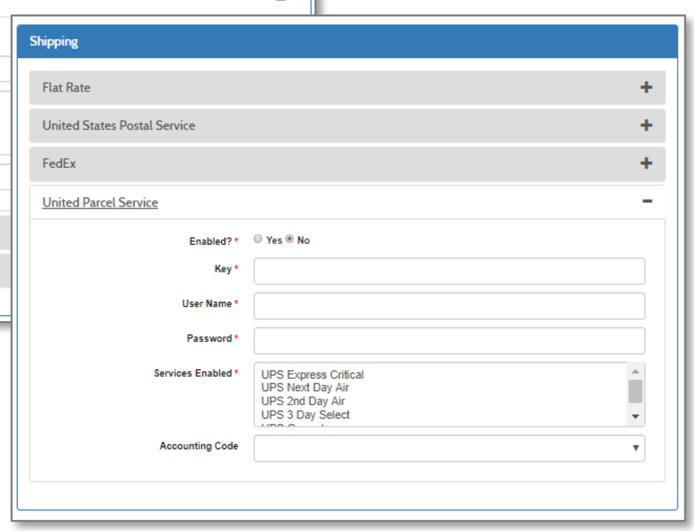
**Ship:** Rates may be determined by a flat rate or use real-time rates for their selected carriers (options are USPS (US only), Canada Post (Canada only), FedEx, and UPS).




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.




Carriers available:

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

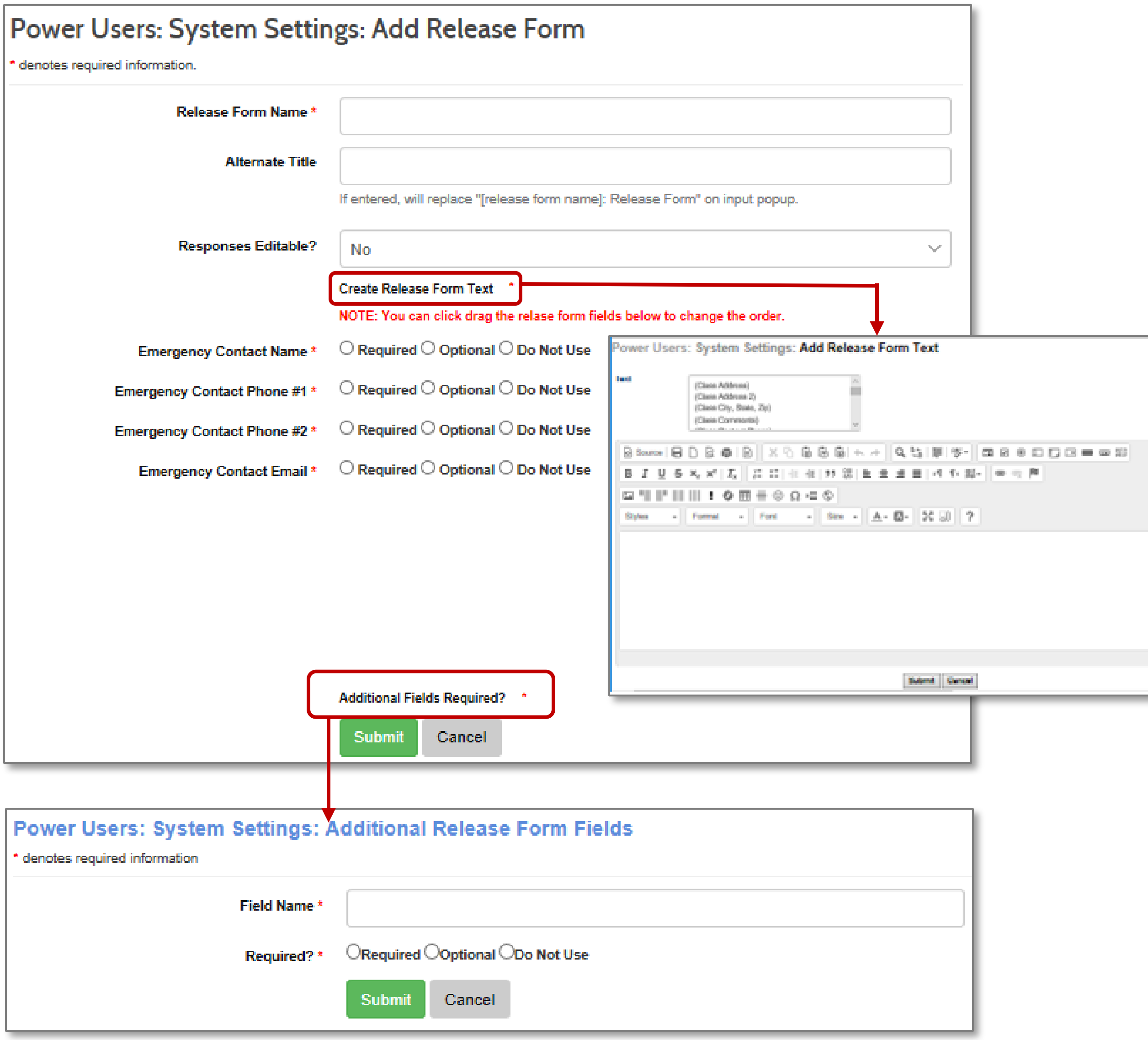
Available carriers have settings for their specific API / account information - these fields may vary by carrier. Customers create API accounts for the carriers for which they want to use real-time rates.

# System Options

## Power User Settings – Release Form Management

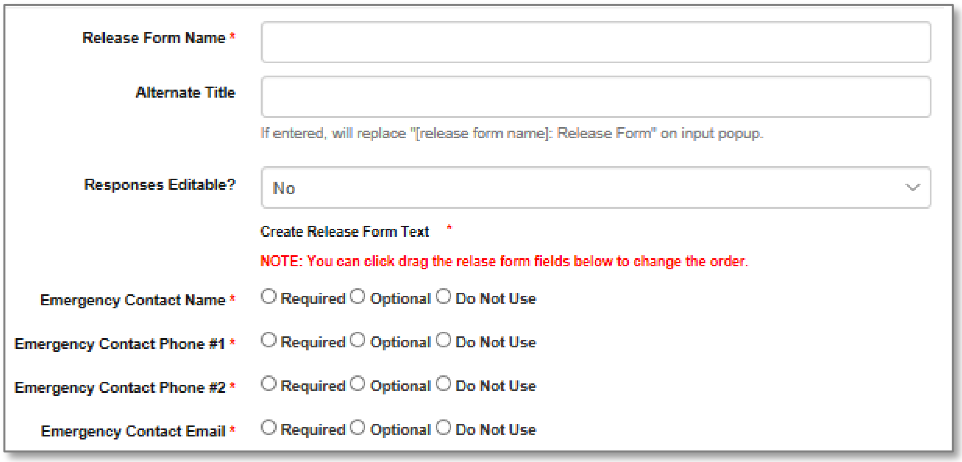
iPRO PRO CLTV STND

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




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

<u>Additional Reference:</u>
If you wish to use Release Forms a Quick Reference is available.
*Customer Support > Document Center > Quick Reference Library >* ***Release Forms***


Release Form Name *

Alternate Title

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

Responses Editable? No

Create Release Form Text *

NOTE: You can click drag the relase 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

**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?

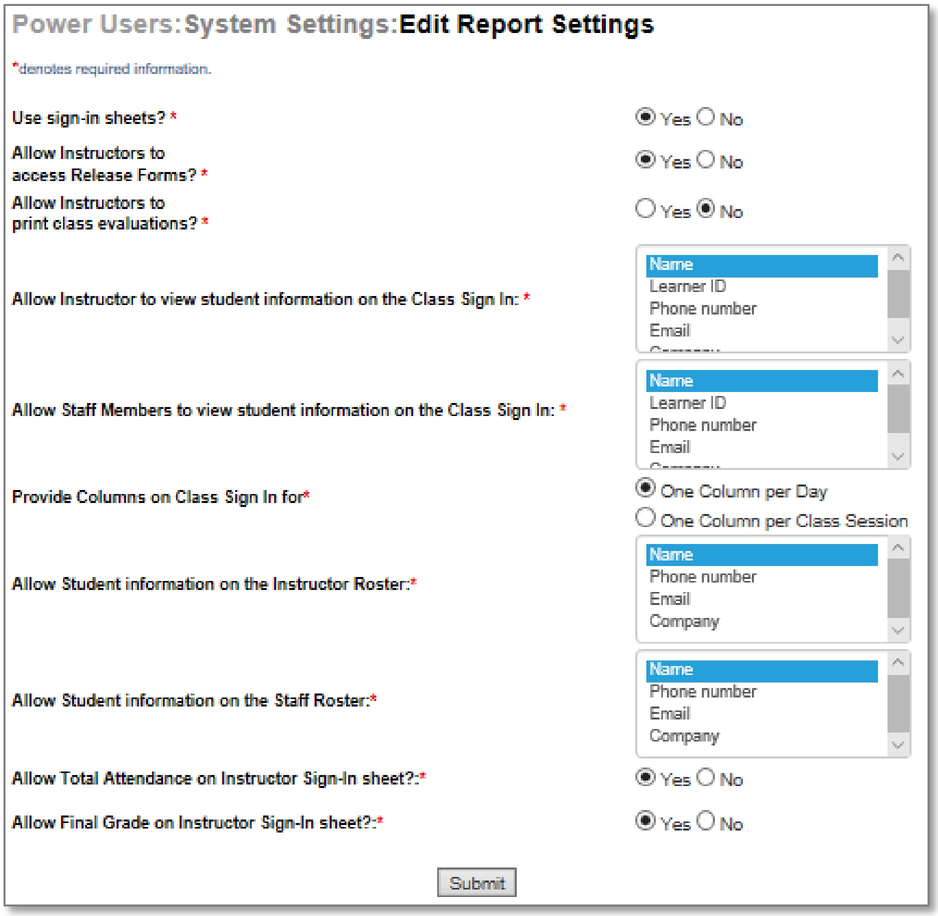
Do you have other information you want to gather on behalf of your organization or the Instructor before the class begins?

# System Options

## Power User Settings – Report Settings

iPRO PRO CLTV STND

*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<br>Learner ID<br>Phone number<br>Email |
| Allow Staff Members to view student information on the Class Sign In: * | Name<br>Learner ID<br>Phone number<br>Email |
| Provide Columns on Class Sign In for* | ◉ One Column per Day<br>○ One Column per Class Session |
| Allow Student information on the Instructor Roster:* | Name<br>Phone number<br>Email<br>Company |
| Allow Student information on the Staff Roster:* | Name<br>Phone number<br>Email<br>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

iPRO PRO

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

**Power Users: System Settings: 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 | ☐ | 3 |

### Lumens iPRO Customer Information

- Colleague
- PeopleSoft
- Banner

Slim Profiles do not integrate with ERPs. Full learner profiles are required even when using a Contract Training feature.

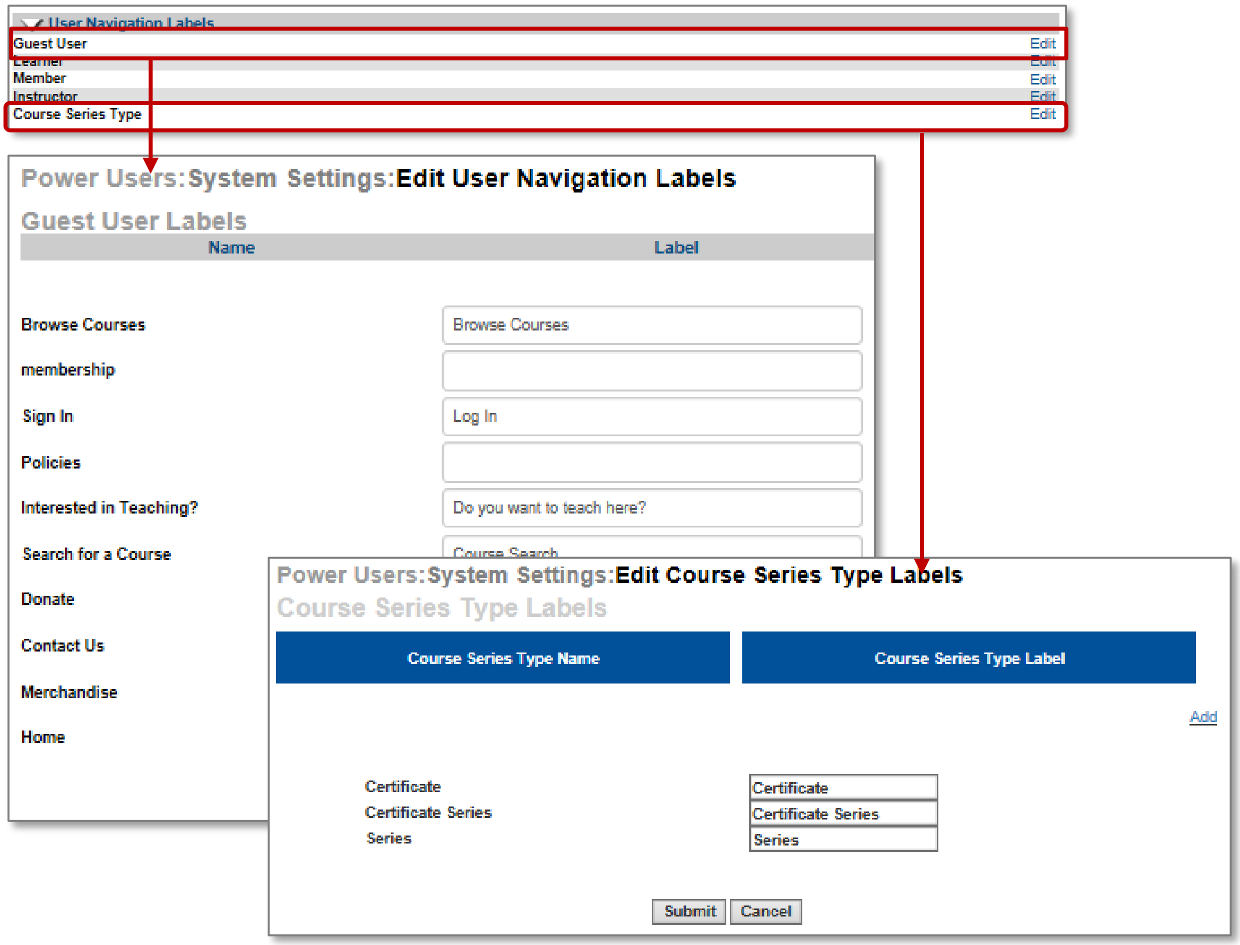
| | | | | |
|---|---|---|---|---|
| State/Province | ☐ | ☐ | ☐ | |
| Zip/Postal Code | ☐ | ☐ | ☐ | |
| Zip+4 | ☐ | ☐ | ☐ | |
| Phone | ☐ | ☐ | | |
| Additional Phone #2 | ☐ | ☐ | | |
| Additional Phone #3 | ☐ | ☐ | | |
| Additional Phone #4 | ☐ | ☐ | | |

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 – **User Navigation Labels***




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.

<u>Ripple Effect:</u>

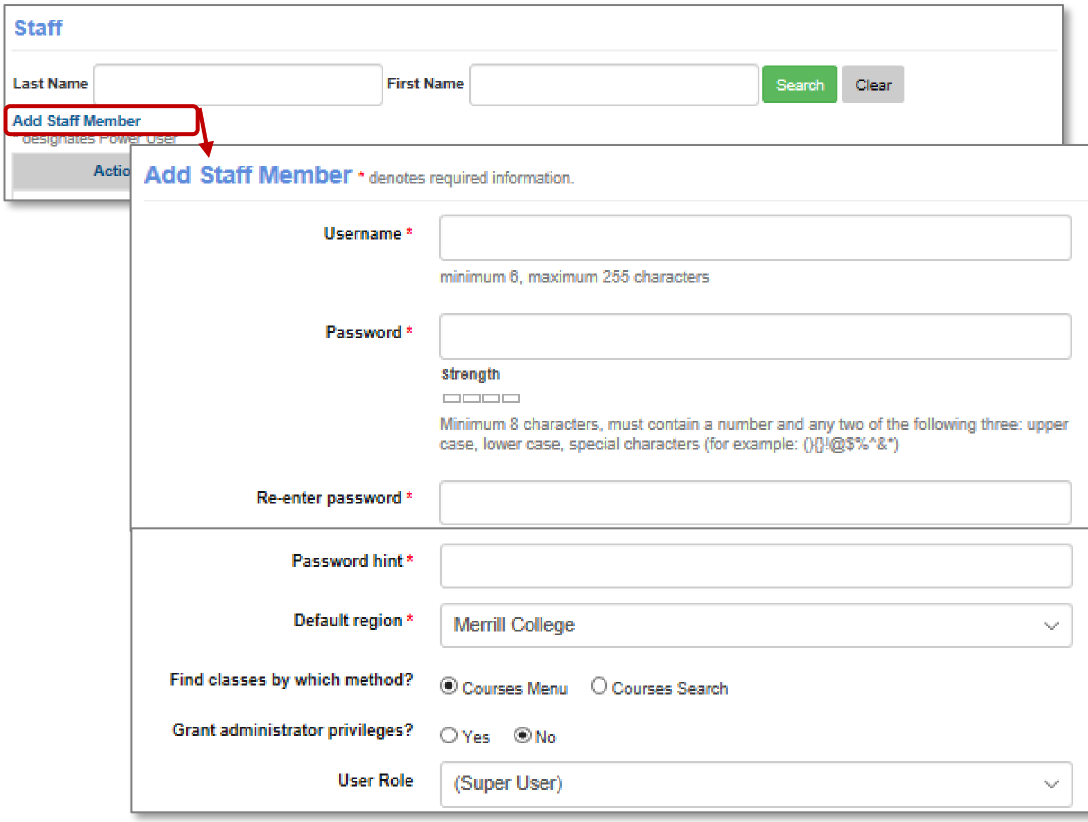
These menu items are listed in the site configuration. If custom menus have been added, they too will display. Also, the menu changes will only apply to the specific view edited (Guest,  Student, etc.), to keep continuity in your site, changing a menu item such as Sign In, should be changed under all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

# System Options

## Staff Members: Create Profiles

iPRO PRO CLTV STND

*System Options >* ***Staff Members***




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.

### Lumens iPRO Customer Information

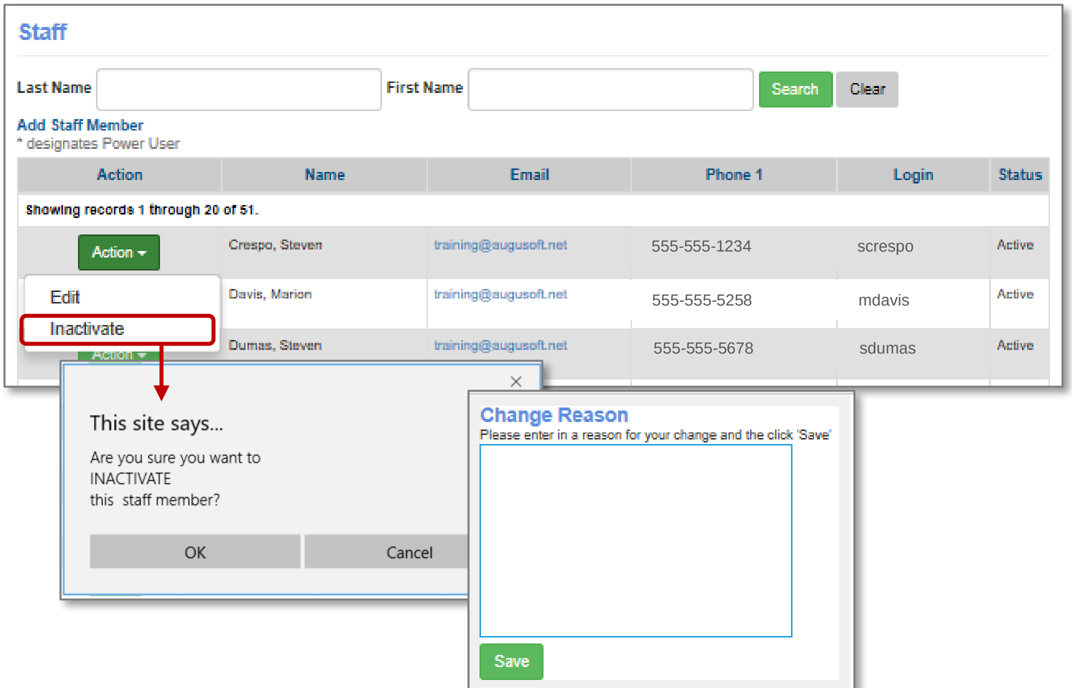
We recommend assigning a security person(s) that manages staff profile creations and user roles.

# System Options

## Staff Members - Create Profiles - Continued

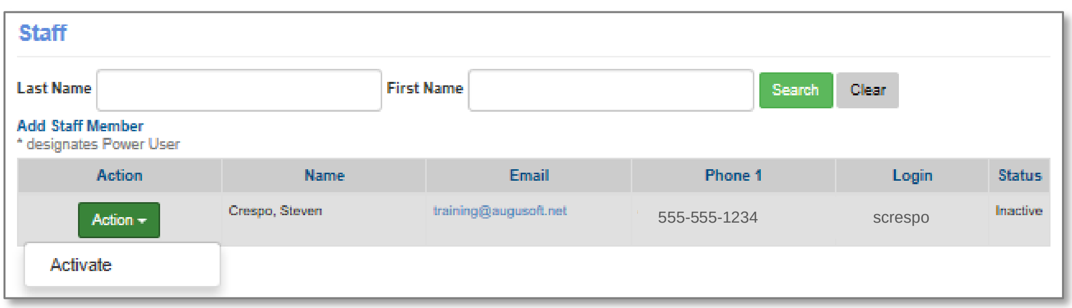
iPRO PRO CLTV STND

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.




<u>Activate / Inactivate a profile:</u>

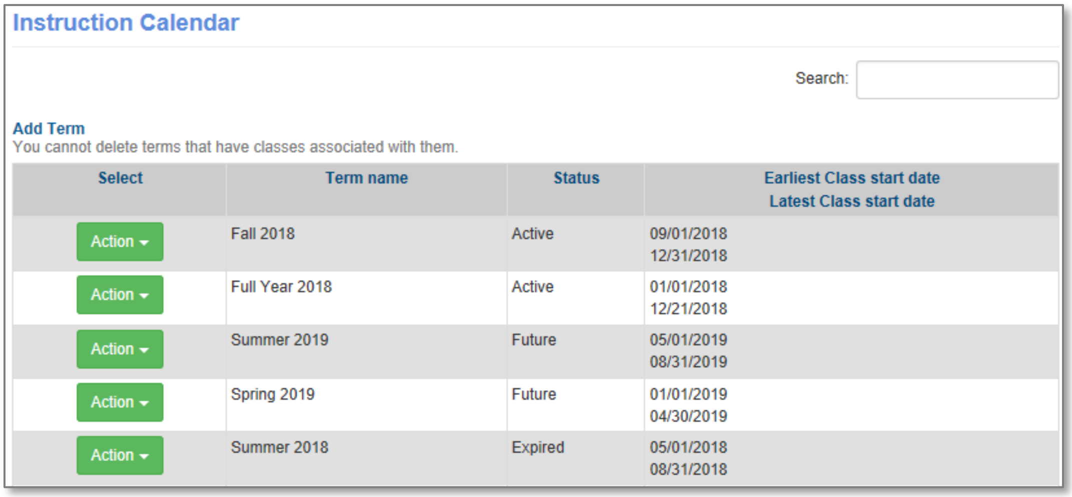
If a Staff member no longer requires access to your Lumens website, a Power User can inactivate the profile. A warning message will appear to ensure this is what you want to do. The profile will move to the inactive profiles (end of the list). The profile can be reactivated if necessary.




<u>Try It!:</u>

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.

*System Options > **Instruction Calendar***



Instruction Calendar

Search:

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

| Select | Term name | Status | Earliest Class start date<br>Latest Class start date |
|---|---|---|---|
| Action | Fall 2018 | Active | 09/01/2018<br>12/31/2018 |
| Action | Full Year 2018 | Active | 01/01/2018<br>12/21/2018 |
| Action | Summer 2019 | Future | 05/01/2019<br>08/31/2019 |
| Action | Spring 2019 | Future | 01/01/2019<br>04/30/2019 |
| Action | Summer 2018 | Expired | 05/01/2018<br>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.

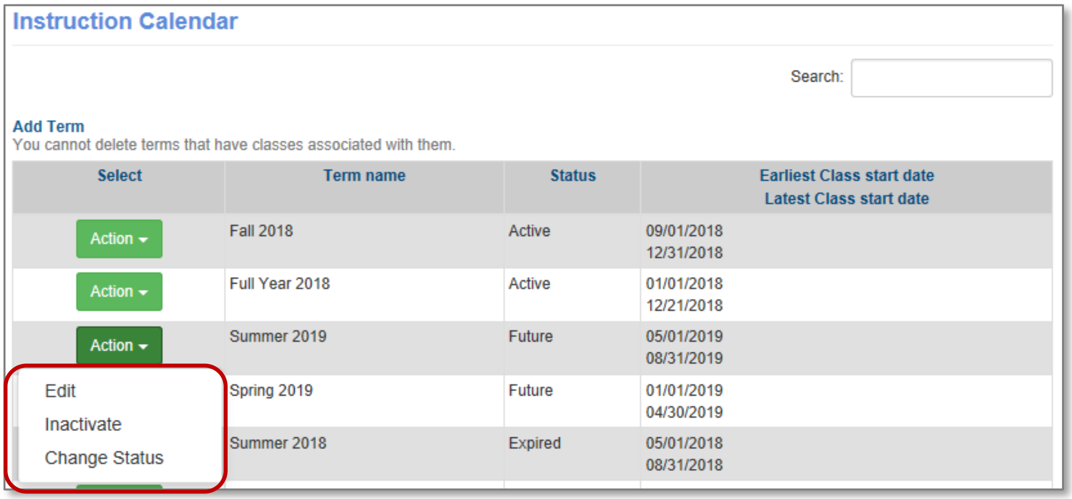
<u>Ripple Effect:</u>

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

iPRO PRO CLTV STND




Action Drop Down options:

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

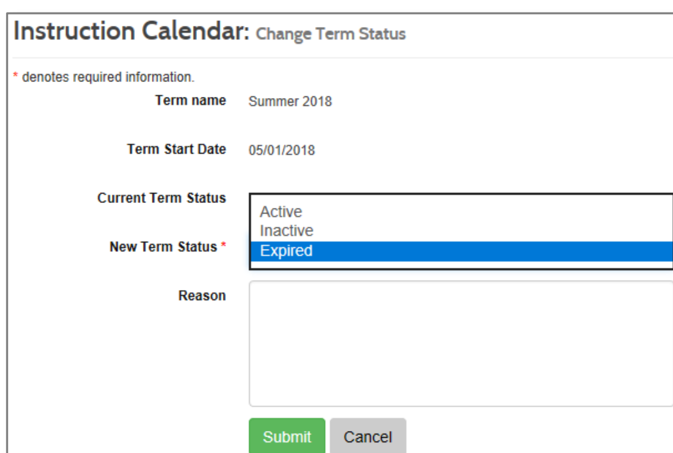
- **Edit**: This provides the options to edit details of the term. Editing the term will not automatically change existing classes associated with the term**.**
- **Delete**: This will only display if no classes have been associated with the term.
- **Inactivate**: If there are classes associated with 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*

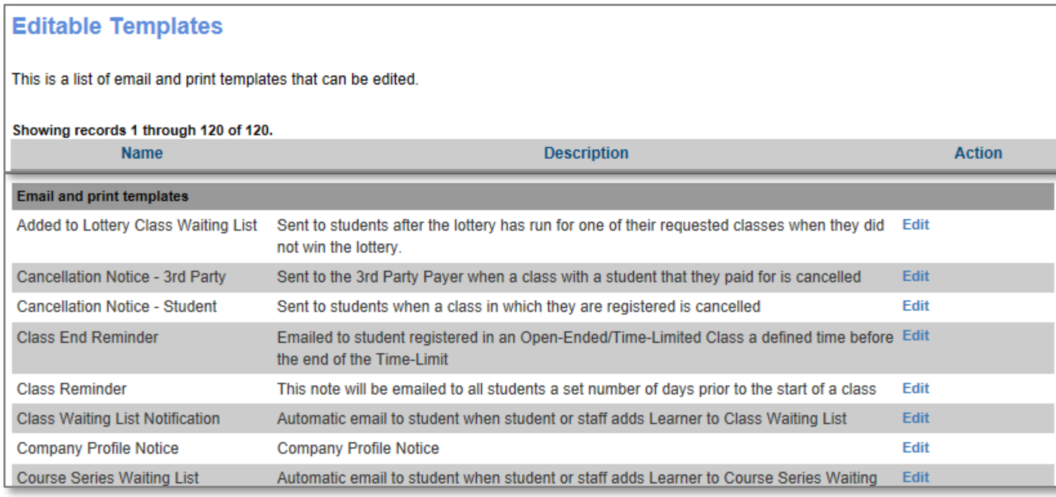


# System Options

## Template Management - Email Templates

iPRO PRO CLTV STND

*System Options >* ***Template Management***



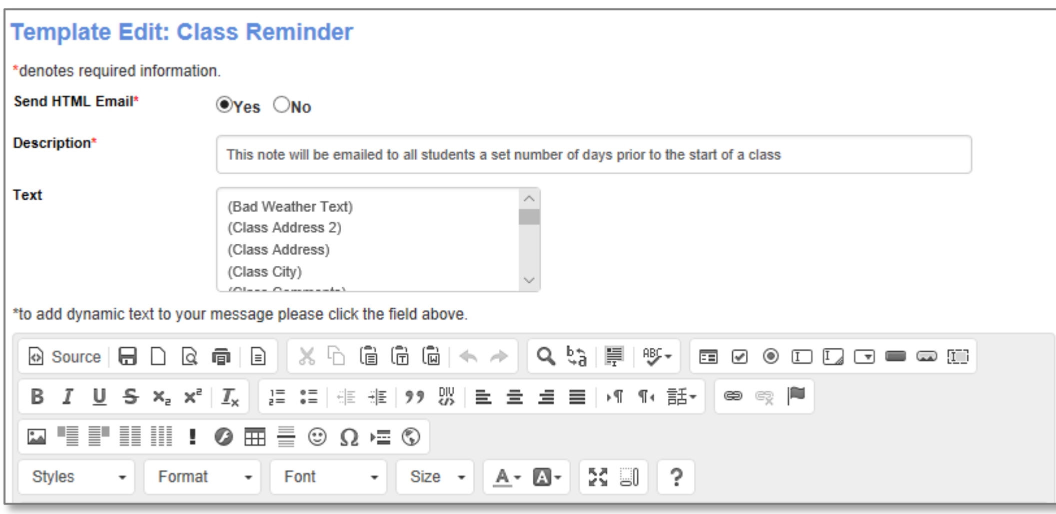
**Editable Templates**

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.




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

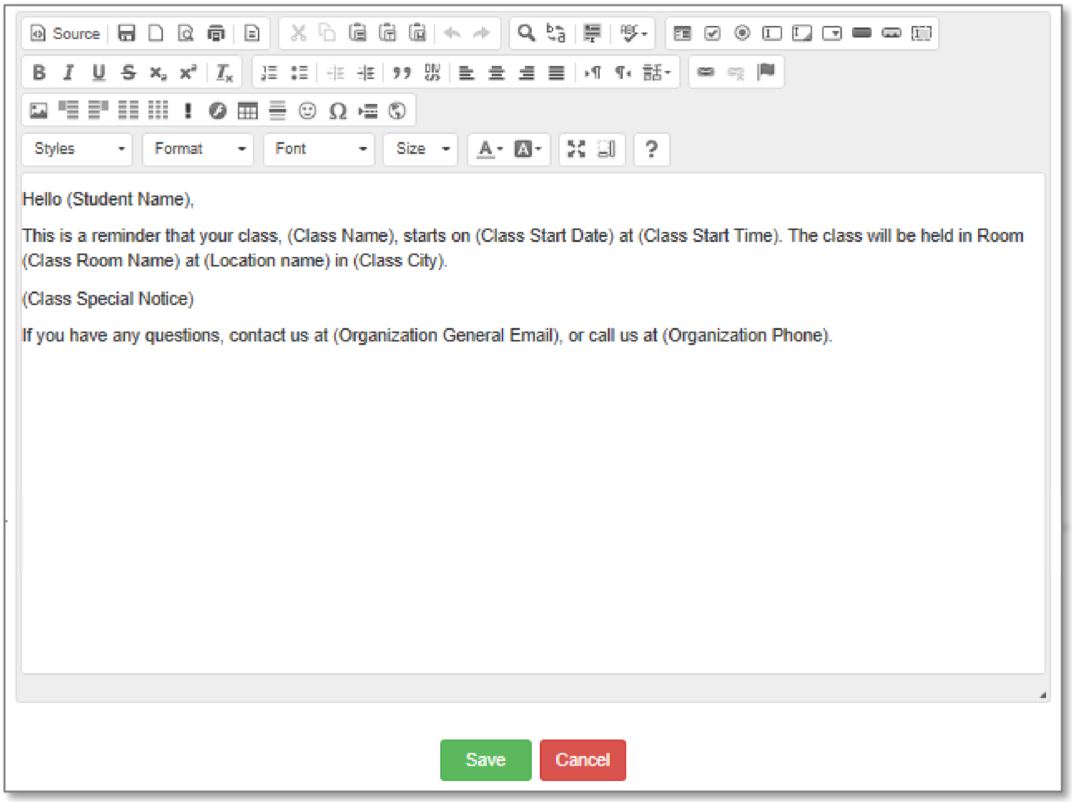
**Description:** This is a brief explanation of when or how the email is used in Lumens. It can be edited to clarify for your Staff.

**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 -l Email Templates - Continued

iPRO PRO CLTV STND




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

<u>Questions:</u>
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?

________________________________________________________________

<u>Ripple Effect:</u>
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

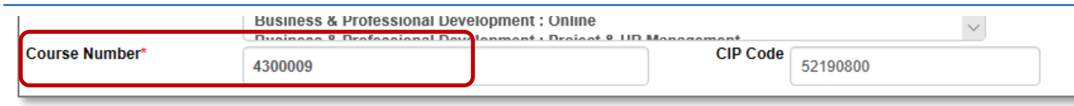
This section of the workbook focuses on the modification options for categories, subcategories, and terms only available to power users.

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


### Lumens iPRO Customer Information

- Colleague
- PeopleSoft
- Banner

Categories and subcategories cannot be edited on integrated sites. New ones must be created.




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.


### Lumens iPRO Customer Information

- Colleague
- PeopleSoft
- Banner

Categories and subcategories cannot be edited on integrated sites. New ones must be created.


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

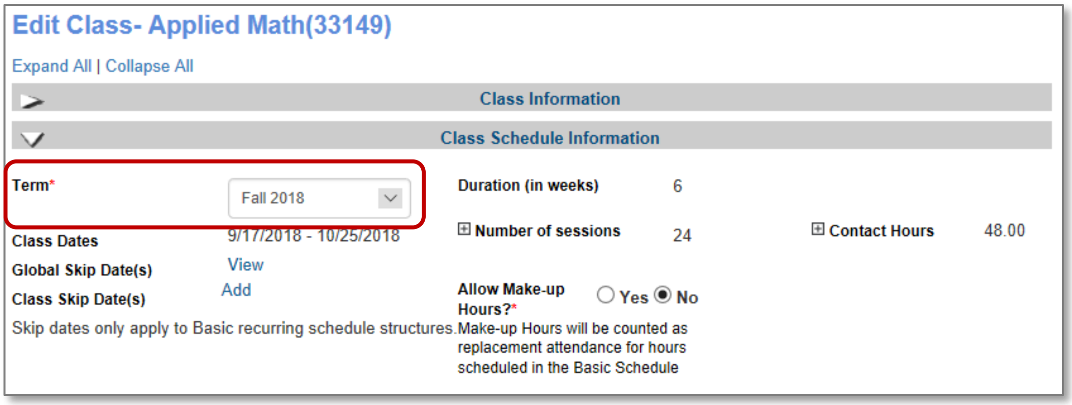
If data is reviewed by Category or Subcategory, the information is affected. If you use Course numbers to identify certain revenue streams, this information will be affected.

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.

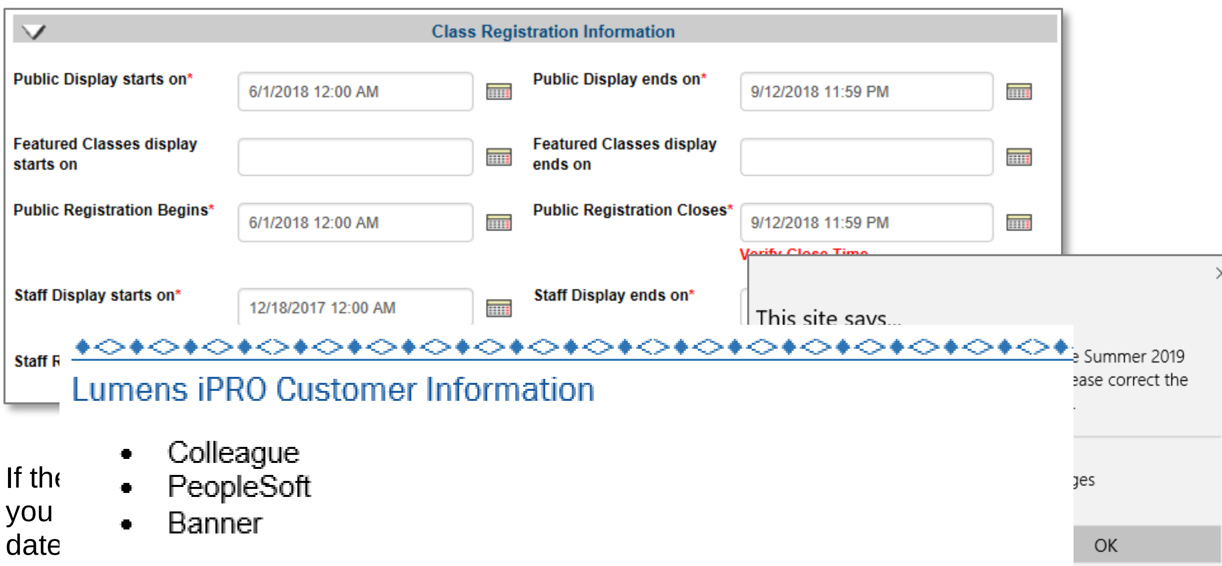
<u>Try It!:</u>
Go ahead and edit a course changing the Category / Subcategory to some other option. Notice the course number change. No need to save.

- Let your Implementation Manager know when complete.

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




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).




If the you date adju

### Lumens iPRO Customer Information

- Colleague
- PeopleSoft
- Banner

Class terms cannot be edited on integrated sites. New classes must be created.

<u>Information</u>:
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

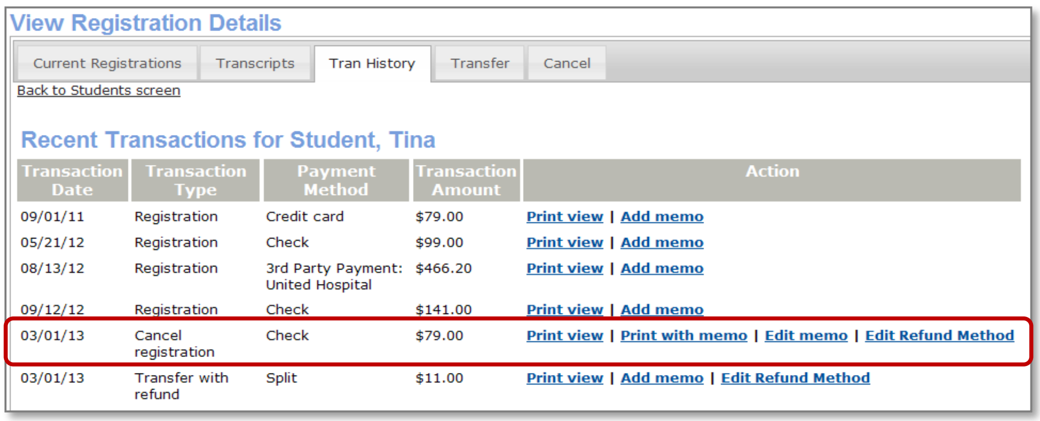
iPRO PRO CLTV STND

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**



View Registration Details

Current Registrations | Transcripts | Tran History | Transfer | Cancel

Back to Students screen

Recent Transactions for Student, Tina

| 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 |

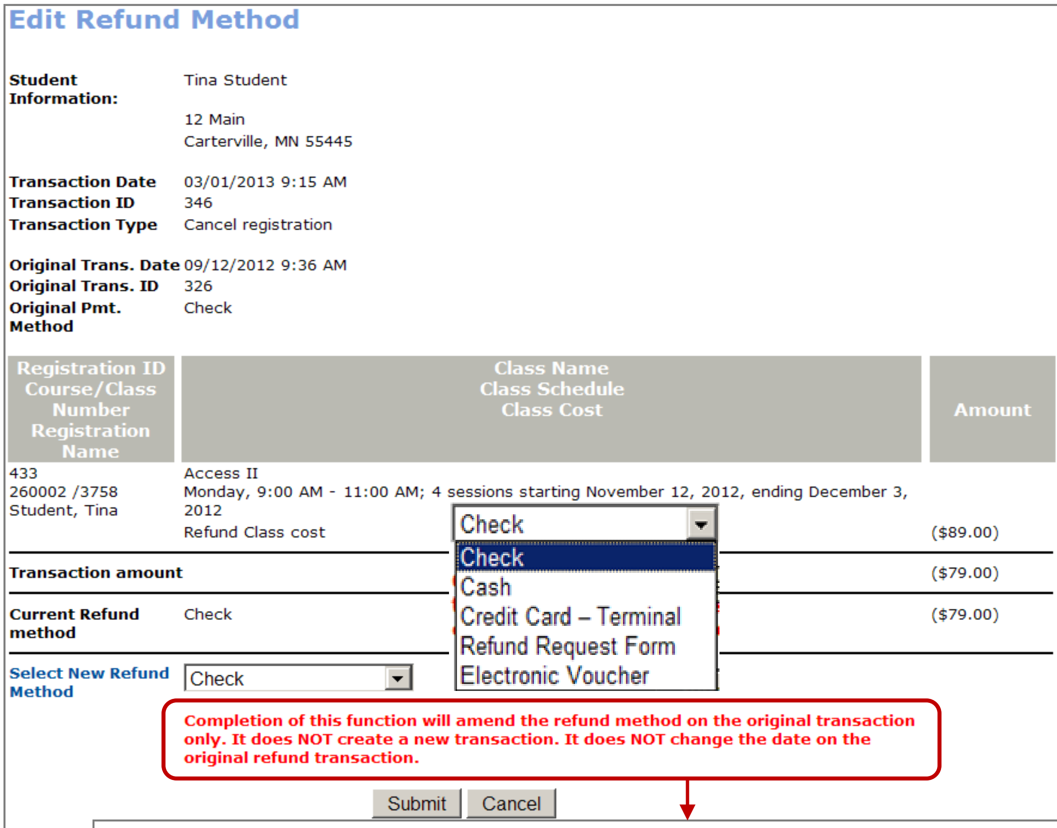
Access the transaction history of a student is where a Power User will locate the option to edit a refund method. Other options are available, however, those are also available to others with transaction history access.

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.



### Edit Refund Method

| | |
|---|---|
| **Student Information:** | Tina Student<br>12 Main<br>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<br>260002 /3758<br>Student, Tina | Access II<br>Monday, 9:00 AM - 11:00 AM; 4 sessions starting November 12, 2012, ending December 3, 2012<br>Refund Class cost | ($89.00) |
| **Transaction amount** | | ($79.00) |
| **Current Refund method** | Check | ($79.00) |
| **Select New Refund Method** | Check | |

Check
Check
Cash
Credit Card – Terminal
Refund Request Form
Electronic Voucher

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.

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.

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

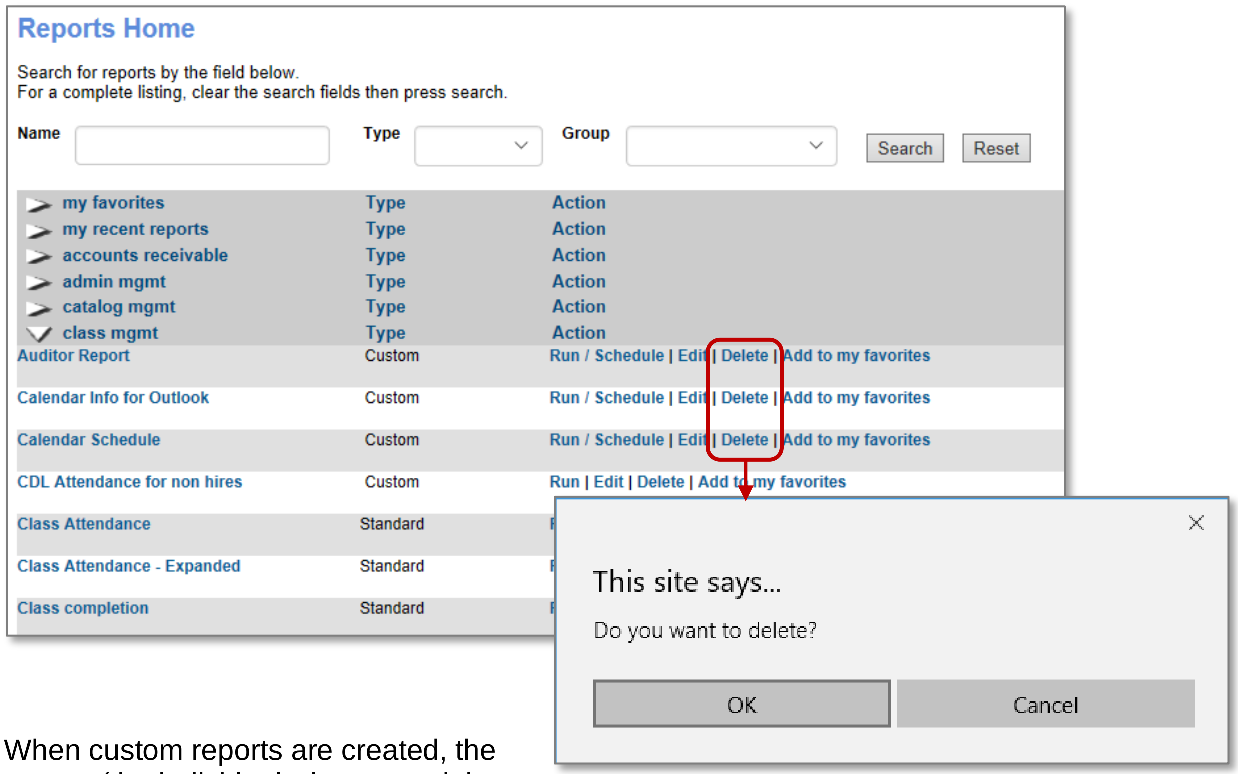
iPRO PRO CLTV STND

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***




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:<br>○ The original transaction is changed | *This process does not create a new transaction and should be done with caution.* |
| **F:** A Power User can delete any existing reports. | *False – A power User can delete custom public reports.* |
| **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 ___________________.<br>○ Be Incorrect and should be re-run | *Any previously run reports that may have this refund information should be rerun to ensure accuracy.* |
| | |

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