

QRA: ProTrain® OCP Initial Setup

The first time you set up ProTrain online classes in your site you must follow these steps. This process focuses on the initial set up and import of ProTrain courses. The maintenance of your online classes should coincide with the preparation of your other term offerings. You will want to re-import the courses every term to ensure you are offering the most updated content.

Prior to configuration, email info@protrainedu.org to request your **Customer/Unit Code**, indicate you are a Lumens customer.

Step 1: Enable Online Course Provider

Power Users: System Settings: Edit General Settings

Enable Online Course Providers	Provider	Yes	No
<input checked="" type="radio"/>	ProTrain	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	UGotClass	<input type="radio"/>	<input checked="" type="radio"/>
<input type="radio"/>	Pearson Workforce Education	<input type="radio"/>	<input checked="" type="radio"/>
<input type="radio"/>	World Education	<input type="radio"/>	<input checked="" type="radio"/>

System Options > **Power User**
Open General Settings and Click *Edit*

- Locate *ProTrain*
- Click, Yes to enable
- Click, *Submit*

Step 2: Configure Course Provider

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

Default Import Catalog *

Customer/Unit Code *

Requires Registration Fee? * Yes No

Display Graphic * Yes No

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

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

Default Refund Policy *

Lead/Info Request Notifications

Default Acct Code for Class Cost *

Course Mgmt > **Online Course Mgmt**

- Click the *Action* drop down
- Select *Configure*

Fill out the required fields

- **Customer/ Unit Code:** Enter code received from Protrain
- **Requires Registration Fee?:** Select Yes or No
- **Display Graphic:** Select Yes or No
- **Alternate Graphic:** See additional tools
- **Contact Email:** Enter OCP contact
- **Refund Policy:** Choose Protrain Refund
- **Lead / Info Request Notifications:** Decide where to send Student inquiries for specific classes.
- Click, *Submit*

Step 3: Manage Categories

Course Mgmt > Online Course Mgmt

- Click the *Action* drop down
- Select *Manage Categories*

The Category (displayed left site) is the Provider Category. You must map the categories you wish to import.

- Select your Category / Subcategory to map using the drop-down menu
- **Reassign existing courses & classes:** Choose *Yes* or *No*
- Click *Submit*.

Step 4: Import Courses

Course Mgmt > Online Course Mgmt

- Click the *Action* drop down
- Select *Import*

Choose Criteria

- **Import to Catalog:** Select Catalog (if applicable)
- **Import to Term:** Choose Term
- **Provider Subcategory:** Choose the provider subcategory to import
- **Select Refund Policy:** Choose the policy specific to the activated OCP
- Click *Start Import*

Note: Enter accounting code if applicable.

Import Complete

Upon completion, the results list will appear. The results list how many new records were created at both the Course and Class level, how many were updated and if any of the records were inactivated.

Note: Once the OCP Course is created through import, subsequent imports (updates) only create additional classes

Step 5: Edit Course (Make Available)

Course Providers : Course Edit : ProTrain

Available? Not Available

Initial Course Import Dates
From To

Last Course Update Dates
From To

Category and/or Subcategory

Course Name

Course Number

Search

Course Mgmt > **Online Course Mgmt**

- Click the *Action* drop down
- Select *Edit Course*
- Filter by *Not Available*
- Click *Search*.

Course Name (CourseID)	Category:Subcategory	Course Number	Cost MSRP	Price	Action	Available? <small>check all</small>
AutoCAD Revit Architecture 1 - Residential Buildings (3549)	Computer Technology: Web Development & Design	<input type="text"/>	645.00 645.00	<input type="text" value="645.00"/>	Edit	<input type="checkbox"/>
Business Management/Leadership Certificate (3550)	Business & Professional Development: Entrepreneurship	<input type="text"/>	2,325.00 2,325.00	<input type="text" value="2325.00"/>	Edit	<input type="checkbox"/>
Business Strategy and Operations (3551)	Business & Professional Development: Entrepreneurship	<input type="text"/>	2,325.00 2,325.00	<input type="text" value="2325.00"/>	Edit	<input type="checkbox"/>

Showing 1 to 10 of 107 entries

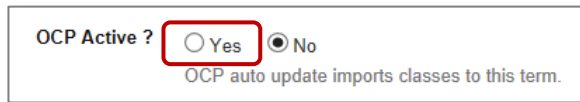
Update the cost based on the above entries for all classes starting on or after this date

leaving blank will update cost on all classes starting on or after today's date

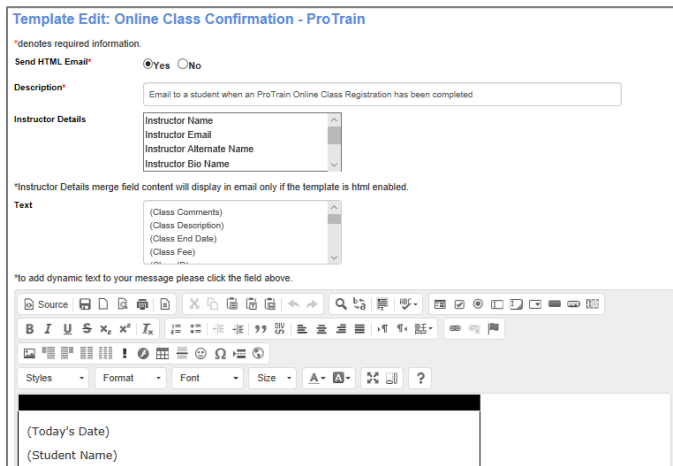
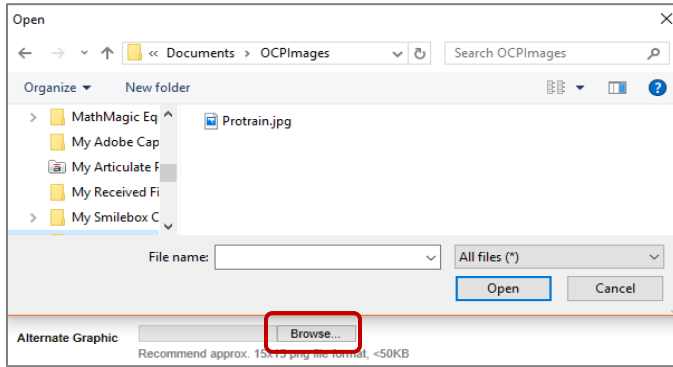
Submit

- Enter Course Numbers if your program manually creates course numbers.
- Enter Price (you will be charged for the Cost when the class is sold).
- Select the Checkbox under *Available?* column
- Click Submit per page to make each Course / Class available and visible for registration.

Additional Tools / Options:



You may set your classes to auto import (this occurs monthly). This setting is defaulted to No.



Note:

This email template only applies to ProTrain registrations. You will be held accountable for any discrepancies if you choose to update the policy in favor of the student.

Your initial import / setup for ProTrain online classes is complete!

See Lumens Integrated Online Maintenance QRA to manage your ProTrain Courses

- Automatic updates will ensure you have the most updated Courses / Classes on your website, however, enabling this setting will only update Courses / Classes that have already been imported. If you did not import all the Courses and Classes initially, and you want to add more, you will need to import again. If you do not enable automatic updates for every active term, manual maintenance should be performed as part of your process to prepare for a new term.

Please remember that Augusoft will be billing you for the online classes run through Lumens. You will receive a monthly invoice for the sum of the class cost for the classes sold, you keep the profit margin, or the amount between the price and the amount the student paid. We have streamlined this process to collect on behalf of third party vendors.

Auto Imports

System Options > **Instruction Calendar**

- Select the applicable term
- Click *Edit*
- Choose Yes for OCP Active?

Alternate Graphic

- You may choose a small icon to place next to your offerings. If you chose Display Graphic, the default graphic is the OCP logo stored in Lumens. If you wish to upload your own, click *Browse* and select image from your files to upload.

Email Template

System Options > **Template Mgmt**

- Locate Email Templates
- Select *Online Class Confirmation – ProTrain*
- Click *Edit*

Review this template.

- If you chose to modify this text, make your updates.
- Use the text select list when replacing dynamic text such as: Today's Date, Organization Name, Class Name, etc. The fields are noted in the text with parentheses.

For Lumens iPRO/Integration customers only

When OCP classes are loaded into your Lumens production site, with the first registration you will receive an email. The class will need to be synced with your ERP. You will get this notice only **once per class** with the **first** registration.

VIEW CLASS- AUTOCAD FUNDAMENTALS CERTIFICATE(1907)

Important! When editing classes, only one browser tab should be open. Using multiple tabs mixed between the two records.

Expand All | Collapse All

▶ Class Information

▼ (Your ERP) Specific Data

Sync to (Your ERP)

<https://xxxlmc.augusoft.net>

Transaction Type: All Types | Transaction Status: Processed | Select Start Date: 01/23/2020 12:00 AM | Select End Date: 01/24/2020 12:00 AM

Search Text: | Search In: Nothing selected | List of Colleges: [Dropdown] | **Search**

Reviewed?: No

ID	Key Details	Status	Type	Notify User	Created Date	Last Modified Date	Actions
1571154212	156 Class ID : 2081 ERP ClassID : 137941 Class Name : AUTOCAD FUNDAMENTALS	Processed	Class	[Link]	10/15/2019 09:43:32 AM	10/15/2019 09:43:52 AM	Action

Actions

Action

Mark as Reviewed

Course Mgmt > Courses/Classes

- Check the " Sync to ERP" box
- Click Submit at the bottom of the page

LMC process:

- Log into Production LMC

Search Settings:

- Transaction Type = All Types
- Transaction Status = Processed

Search Results

- Verify both Class and Student Registration appear. (Student Registration is not displayed in screen capture)

Review

- Click the Action drop down
- Select Mark as Reviewed