

QRA: World Education® OCP Initial Setup

The first time you set up World Education online classes in your site you must follow these steps. This process focuses on the initial set up and import of World Education 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.

Step 1: Enable Online Course Provider

Power Users: System Settings: Edit General Settings

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

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

- Locate *World Education*
- Click, **Yes** to enable
- Click, **Submit**

Step 2: Configure Course Provider

Course Providers: Edit Provider: World Education
* denotes required information.

Default Import Catalog *	All Catalogs
Customer/Unit Code *	<input type="text"/>
Requires Registration Fee? *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Display Graphic *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Alternate Graphic	<input type="text"/> <input type="button" value="Browse..."/> <small>Recommend approx. 15x15 png file format, <50KB</small>
Contact Email *	<input type="text"/> <small>OCP related updates will be sent to this email.</small>
Default Refund Policy *	<input type="text"/>
Default Acct Code for Class Cost *	<input type="text"/>
	<input type="button" value="Submit"/> <input type="button" value="Cancel"/>

Course Mgmt > Online Course Mgmt

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

Fill out the required fields

- **Customer/ Unit Code:** School Name
- **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 World Ed Refund
- **Account Code:** Choose applicable
- Click, **Submit**

Step 3: Manage Categories

Manage World Education Categories

Provider Category Provider Subcategory	Current Lumens Category Current Lumens Subcategory	New Category New Subcategory
Alternate Languages Alternate Languages	OCP Category has not been mapped, select Category and Subcategory to map.	<input type="text"/> <input type="text"/>
Alternate Languages Business And Professional	OCP Category has not been mapped, select Category and Subcategory to map.	<input type="text"/> <input type="text"/>

Re-assign existing courses & classes to the new category/subcategory selections? Yes No

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

Step 4: Import Courses

Course Providers: Import Data: World Education

Import To Catalog

Import To Term

Provider Category
Career Training Programs
Professional Enrichment

Provider Subcategory
Business and Professional
Career Advantage

Select Refund Policy

Course/Class Cost Accounting Code

Course Mgmt > Online Course Mgmt

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

The Category (displayed left side) 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*

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 Category:** Choose the provider categories to import.
- **Provider Subcategory:** Choose the provider subcategories to import.
- **Select Refund Policy:** Choose the policy specific to the activated OCP
- Click *Start Import*

Course Providers:Import:Results:World Education

- Created **11** new Course records
- Updated **0** Course records
- Inactivated **0** Course records

- Created **31** new Class records
- Updated **0** Class records
- Inactivated **0** Class records

- Created **8** new Instructor Profile records
- Updated **25** Instructor Profile records
- Inactivated **0** Instructor Profile records

- Created **8** new Instructor Bio records
- Updated **13** Instructor Bio records

Edit Courses **Return to Course Providers**

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.

Step 5: Edit Course (Make Available)

Course Providers : Course Edit :

Available? Not Available

Initial Course Import Dates
From To

Last Course Update Dates
From To

Category and/or Subcategory

Course Name

Course Number

Search Clear Filters Cancel

Edit Courses

Course Mgmt > Online Course Mgmt

- Click the *Action* drop down
- Select *Edit Course*

Filter by *Not Available* and click *Search*.

Course Name (CourseID)	Category:Subcategory	Course Number	Cost MSRP	Price	Action	Available? check all
Accounting Math Professional (3785)	Business & Professional Development: Business Careers	<input type="text"/>	2,395.00 n/a	0.00	Edit	<input type="checkbox"/>
Actualización y Capacitación en Forrajes Conservados (3710)	Life & Leisure: Language	<input type="text"/>	150.00 n/a	0.00	Edit	<input type="checkbox"/>
Advanced Nutrition: Super Foods for the Family (3925)	Life & Leisure: Fitness	<input type="text"/>	150.00 n/a	0.00	Edit	<input type="checkbox"/>

Showing 1 to 10 of 197 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

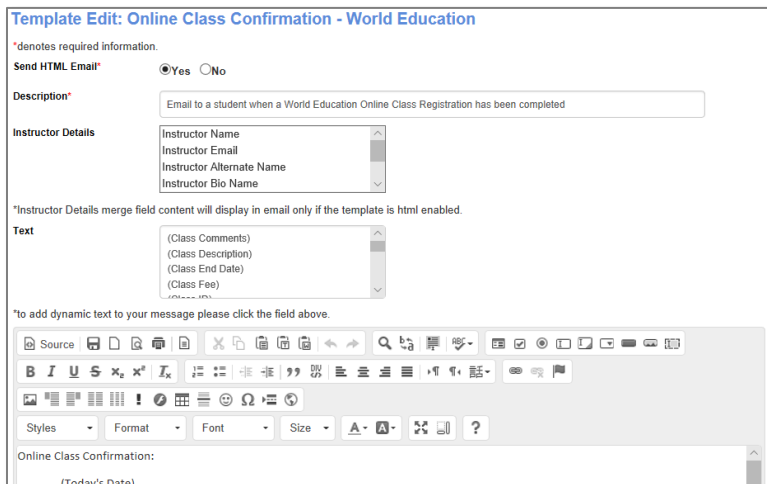
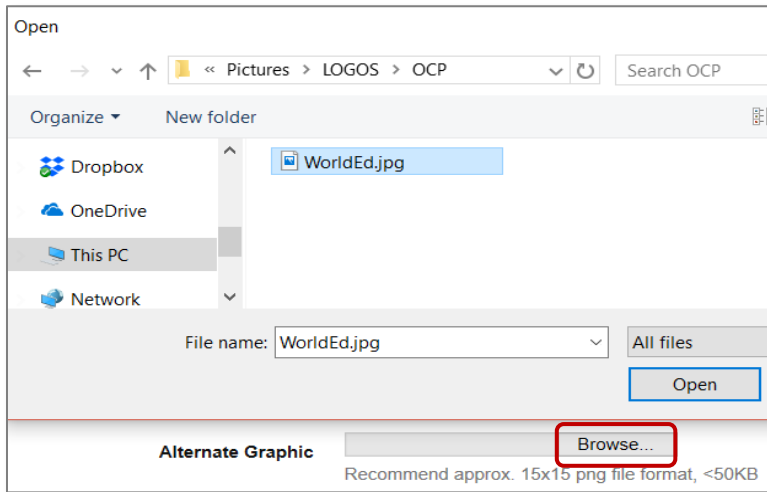
Submit Cancel

- Enter Course Numbers if your program manually creates course numbers.
- Enter price
- Select the Checkbox under *Available?* Column for each class you wish to offer.
- Click Submit per page to make each Course/Class available and visible for registration.

Additional Tools/Options:

OCP Active? Yes No
 OCP auto update imports classes to this term.

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



Your initial import / setup for World Education online classes is complete!

See *Lumens Integrated Online Maintenance QRA* to manage your World Education Courses

- Ongoing general maintenance should be performed as part of your process to prepare for a new term. This will ensure you have the most updated Courses/Classes on your website.
- 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?

Alternative 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* select image from your files and upload.

Email Template System Options > **Template Mgmt**

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

Review template.

- This email template only applies to World Education registrations.
- We recommend minimal modifications to the template

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: [College Name] | **Search**

Reviewed?: No

ID	Key Details	Status	Type	Notify User	Created Date	Last Modified Date	Actions
1571154212_15	Class ID : 2081 ERP ClassID : 137941 Class Name : AUTOCAD FUNDAMENTALS	Processed	Class	[User Name]	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*