Student Manager New User Training Agenda

Day 1:

Student Manager Intro

- Launching Student Manager
- Navigation Tools
- Shortcut Keys
- View/Edit User Information
- User Levels (impact on users)
- View/Edit Preferences
- User Defined Fields
- Add/Edit Codes
- Entering Data

Using the Online Help

- How to Access
- Table of Contents
- Searching for Topics
- Filtering Search
- Remove Highlighting
- Expanding/Collapsing Sections
- Emailing Topic Link

Day 2

Names

- Name Components
- Adding a Name
- Name Flags
- Call Backs
- Contact Log
- Cloning
- Adding a Firm
- Grouping Names
- Name Quick Reports
- Find Names (F5)

Courses

- Course Components
- Course Types Explained
- Adding Courses
- Clone Courses
- Room Scheduling
- Instructors
- Changing Course Status
- Course Quick Reports
- Find Courses/Quick Counts (F2)

Day 3

Registrations/Payments

- Add Registrations
- Assess Fees
- Group/Ungroup Registrations
- Make Payments
- Print Receipts
- Partial Payments
- Billing/Invoices
- Void Payments
- Cancel Registrations
- Issue Refunds
- Transfer Registrations
- Transfer Payments
- Find Registrations (F4)
- Find Payments (F7)

Day 4

Preparing for ACEweb

- Course Setup
- Catalog Descriptions
- Fees
- Previewing Course Information Page
- Course Groups
- Interests/Source/Tracking Codes

Reporting

- Student Manager Reports
- Quick Reports
- Reports Menu
- Running a Report
- Creating/Emailing a PDF
- Special Use Reports
- Report Favorites