



Student Manager 8.0

ADMINISTRATOR GUIDE

Flexible, Scalable, Powerful
Student Registration Software

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Student Manager Administrator's Guide

Welcome to Student Manager, the ultimate registration management system. This guide covers the key set up issues you will need to address before implementing the Student Manager program:

Creating User Records

You must create a Student Manager user record for everyone who will access and use Student Manager. You must also determine access level (i.e. view only, add only, etc.) each user will have to the various modules and the reporting system.

Note: if your organization purchased the Single User version—AND—you only have one user who will log into the system, you may choose to disable the login process entirely. However, this is not recommended.

Determining Data Collection Needs

Fields in Student Manager can be enabled/disabled depending upon your data collection needs. For instance, if you don't assign coordinators to a course, you won't need to enable the Course Coordinator field for your users.

In addition, Student Manager provides you with user defined fields in the main modules which can be used to collect data specific to your organization (e.g. name of spouse, membership expiration date, etc.). These fields must be enabled and labeled before you can use them. Note: this step can be completed at a later time if you're don't know which fields you want to use right now.

Determining Student Manager Behavior

Many preferences affect the behavior of Student Manager. For example, you may enable the pop up list feature in validated fields, you may choose to record the firm address instead of the individual's home address, or you may choose to assign invoice numbers when billing records are created.

Defining Student Manager Codes

Some codes may have been imported when your data was converted. In addition, Student Manager ships with a "starter set" of codes for most of the main code areas (i.e. Occupation, Organization, Fee descriptions, Account codes, etc.).

These "starter" codes may need to be edited to meet your organization's coding needs. For instance, you may want to delete the "starter" Organization codes since they are not the codes you use. Or you may need to edit the demographic codes to meet your state reporting requirements.

Note: this guide only covers set up issues. For basic Student Manager coverage--such as using navigation tools, finding records, etc.--please visit our New User Resources page:

<https://www.aceware.com/customers/newusers.shtml>

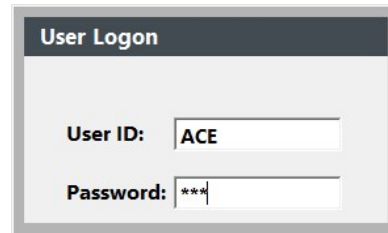
For in-depth Student Manager coverage, please visit the Online Reference Guide:

<https://www.aceware.com/SMHelp/>

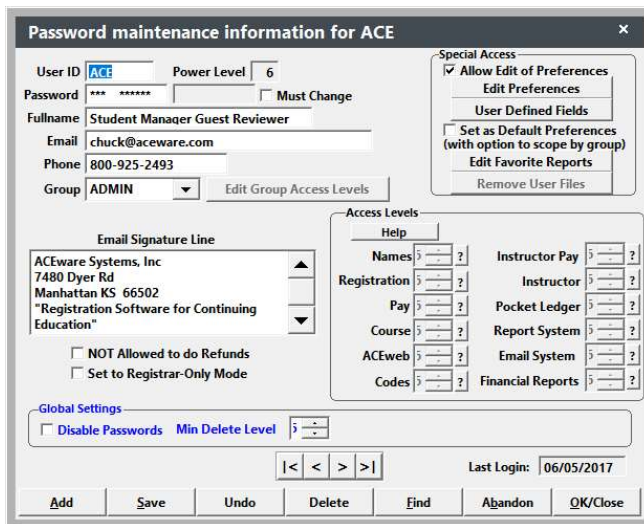
User Records

Your initial user ID and password to log into Student Manager will be:

User ID: ACE
Password: ACE



Once you log into Student Manager, you can access the Password Maintenance screen by selecting **Tools > Password Maintenance:**



Components of the Password Maintenance screen and user records:

User ID - the user's logon name. This value is stored in the Creator and Updated By field on records when the user creates and/or edits a record.



Group – the group to which the user is assigned. Assigning a user to a group allows you to mass assign a specific set of access levels for all members of a group. Student Manager ships with a set of default groups. You can edit the access levels of these groups or you can create new ones. To create a new group:

1. Enter the new Group name in the *Group* field.
2. Press the **TAB** key. You'll be asked if you want to create a new group.
3. Click the **Yes** button.

This will save the new group and make it available to assign to user records.

Access Levels

Student Manager allows you to determine what users can do in the various databases. The following is a list of actions a user can perform at each Access Level.

Record Access--All Databases

These are the basic access levels across most Student Manager databases.

- 0-No Access. Menu items and icons are not available to user.
- 1-View Records Only. User can only view records. Adding/editing options are not available.
- 2-Add Records Only. User can add new records to the database. No editing options are available.
- 3-Add/Edit Records. User can add and edit record information.
- 4-Add/Edit Code Lists (Module > Codes; individual code's + button is enabled)
- 5-Delete Records*

*Minimum delete level can be changed by Student Manager Administrator.

Power Level

The user's Power Level is the lowest of Course, Names, Pay, Registration, Instructor, Pocket Ledger, and Report System. The Power Level is used when determining rights to administrative procedures such as editing User records, purging credit card numbers, voiding receipt/invoice numbers, etc.

Power Levels:

- 3-Backup Data
- 4-Update Counts
- 5-Pack/Reindex and Edit UDF Labels
- 6-Can run all Admin procedures

ACEweb

The ACEweb access level is mostly used to determine staff access to ACEweb Administration procedures.

For more information about Access Levels, see these topics in the Online Help:

https://www.aceware.com/smhelp/#Set_Up/Users/AccessLevel.htm

<https://www.aceware.com/smhelp/#ACEweb/Admin/AWAccess.htm>

Set as Default Preferences

Assign a specific user's preference set to other users in the group or all users in the system.

1. Open the user's record which has the set of preferences you want to assign to others.
2. Check the *Set as Default Preferences* box.
3. Click the **Save** button.
4. Click **Yes** on the Set DEFAULT PREFERENCES window.
5. On the SCOPE FOR DEFAULT PREFERENCES window, click the **NO** button to assign preferences to members of the specified group. Click the **YES** button to assign the preferences to all users in the system.

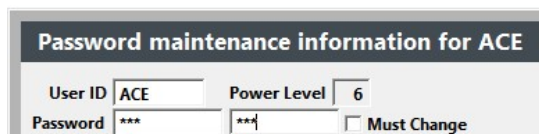
Global Settings

Disable Passwords – for organizations who only have one user who accesses the system.

Min Delete Level – the minimum access level a user must have to mark a record for deletion.

Creating User Records

1. Click the **Add** button to add a new user record.
2. Enter a *User ID*. The user ID can be up to 8 characters in length.
3. Enter a *Password*. The password can be up to 10 characters in length. You must enter the password twice, so when you press **TAB**, the cursor moves to the 2nd password field.



The screenshot shows a form titled "Password maintenance information for ACE". It contains the following fields: "User ID" with the value "ACE", "Power Level" with the value "6", and "Password" with two masked fields (***). There is also a checkbox labeled "Must Change" which is currently unchecked.

4. Press the **TAB** key again. Once you press the **TAB** key, the remaining fields become available so you can continue adding information.
5. Check *Must Change* field IF you want users to change the password the first time they log in.
6. Enter the user's *full name* and *phone number*. Note: the users will be able to edit this information and enter their email address and signature once they log into Student Manager (from Edit > My User Profile).
7. Select the appropriate User Group from the *Group* drop down list.
8. Set the User's Access Levels.
9. Click the **Save** button to save the new User record.

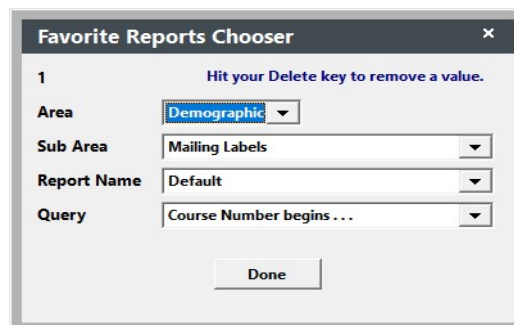
Repeat steps 2-10 until all users have been added.

Report Favorites

Student Manager users can identify up to 10 reports as Favorites so they can be easily found and run. To set a user's Report Favorites:

1. Click the **Edit Report Favorites** button.
2. Click the **Set Report** button to set up a new report or edit a current one.
3. On the Favorite Report Chooser window, select the report area, sub area, name and query.
4. Click the **Done** button.

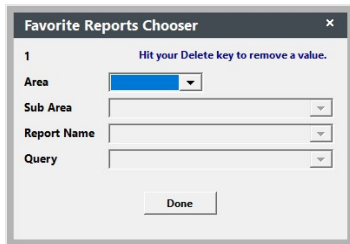
When you click **Close** on the Report Favorites screen, you will be returned to the Password Maintenance screen.



The screenshot shows a window titled "Favorite Reports Chooser". It contains the following fields: "Area" with the value "Demographic", "Sub Area" with the value "Mailing Labels", "Report Name" with the value "Default", and "Query" with the value "Course Number begins ...". There is a "Done" button at the bottom.

Deleting a Report Favorite

1. Click the appropriate **Set Report** button.
2. The Area value will be highlighted. Press the Delete key on your keyboard to clear the value. When you clear the Area, the other fields will also be cleared.

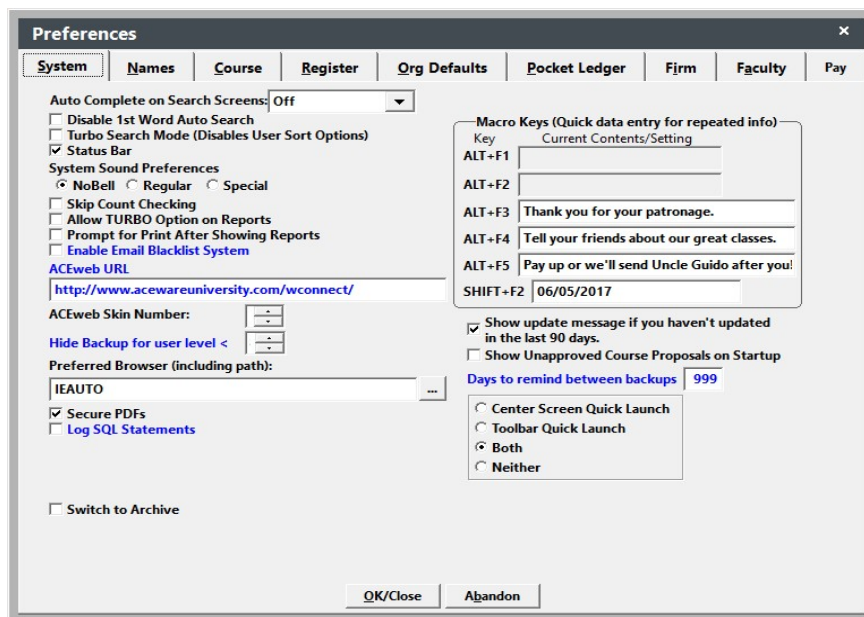


3. Click the **Done** button.

Student Manager Preferences

Enable Student Manager fields and options through the **Preferences** screen. You can access the **Preferences** screen for a user by clicking the **Edit Preferences** button. Preferences are grouped on tabs. Preferences on the tabs are color-coded:

- **Black** - are user specific (they effect the user only).
- **Blue** - are global (effect every user). You must have level 6 access to edit preferences in blue.
- **Purple** - require a security level 6 to change (will not appear on screen if user's security level is lower than 6). **AND** the user must be a level 6 in the particular area to use the option (e.g. user must have a level 6 in Pay to edit receipt numbers).



Once you make the preferences changes, click the **OK/Close** button to save the changes, close the **Preferences** screen, and return to the **Password Maintenance** screen.

For a full listing of Student Manager Preferences, see the Student Manager Topics > Preferences section of the Online Help:


https://www.aceware.com/SMHelp/#Set_Up/Preferences/SMPrefs.htm

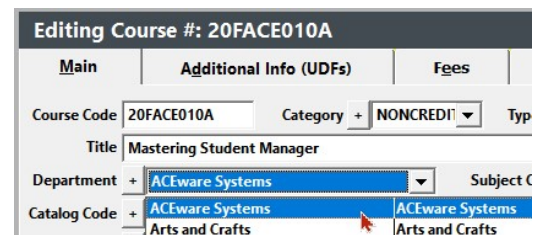
Student Manager Codes

Garbage in-garbage out has become a computer cliché. It refers to collected data that becomes worthless if there is no coordination of how data is entered into the database. To combat this problem, Student Manager uses data validation tools to ensure information conforms with rules set up for specific data elements. Some of these rules are built into Student Manager:

- You cannot enter an invalid date such as April 31st.
- Each name record must have a unique ID number.
- Each course record must have a unique Course Code.
- A course must exist in the database before you can register anyone in the course.
- A registration must exist in the database before you can make a payment to the registration.
- Codes for validated fields must be defined (added to the field's Code list) before they can be used in records.

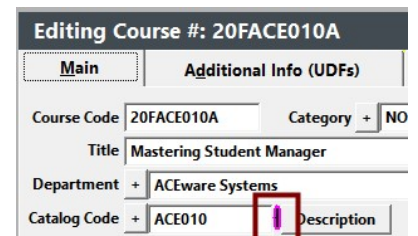
Field Validation

Many of the fields in Student Manager are automatically validated. Most of the validated fields have drop down menus from which you select the appropriate code (access menu with the Down Arrow  button to the right of the appropriate field):



Editing Course #: 20FACE010A			
Main	Additional Info (UDFs)	Fees	
Course Code	20FACE010A	Category + NONCREDI	Typ
Title	Mastering Student Manager		
Department +	ACEware Systems		Subject C
Catalog Code +	ACEware Systems	ACEware Systems	Arts and Crafts

Other validated fields have purple hash marks to the right of the field (Firm field in this example-these are usually fields which have too many codes to display in a drop down menu). In these fields, you type in the code then tab out of the field.



Editing Course #: 20FACE010A			
Main	Additional Info (UDFs)	Fees	
Course Code	20FACE010A	Category + NO	
Title	Mastering Student Manager		
Department +	ACEware Systems		
Catalog Code +	ACE010	Description	

The system checks the Data Validation list and if the code does not exist, you will be asked if you want to create a new code record.

Some fields offer optional validation (e.g. Department field on Course, Salutation on Names). Validation will only occur in these fields if the Validate option is enabled. Enable data validation in these fields on the module's Preferences Tab.

Code System

Student Manager offers a powerful tool in the form of the Code System. But like most tools, unless you use them (and use them correctly) they are worthless. To make the Student Manager Code System work for you, you must:

1. Determine which codes you should use to help you meet your reporting needs.
2. Once you determine which codes to use, enable/disable the appropriate code fields on the module's Preferences tab.
3. Add/edit/delete code values from the sample code set that is shipped with Student Manager to meet your specific coding needs.

Most Student Manager codes are added/edited from [Module > Codes](#).

For a full list of Student Manager code fields, see the Student Manager Topics > Codes > Code Overview topic in the Online Help:

https://www.aceware.com/SMHelp/#Set_Up/Codes/CodesOV.htm

Course Codes

The course code is the unique code that identifies the course. ACEware strongly suggests generating course codes using the following format: 20FYSUP103A.

Year	Semester	Audience (Optional)	Department	Class #	Section
20	F	Y	SUP	103	A

1. Year designated by a two character code (e.g. 20-2020, 21-2021)
2. Semester designated by a single character code that will make the semesters fall in chronological order within a school year. (e.g. F-Fall, S-Spring, U-Summer, W-Winter).
3. Audience designated by a single character code (e.g. Y-Youth, A-Adult).
4. Department designated by a three character code (e.g. SUP-Supervision, BUS-Business).
5. Class number designated by a three/four character code (e.g. 103, 3065)
6. Section number designated by a single character code e.g. A, B, C; or 1, 2, 3).

This coding scheme aids in generating reports (e.g. to run a report for all courses offered in 2020, just run a course number begins with 20 query) and helps the registrar register students in classes (i.e. registrars will easily find courses in the Find list if sorted by year/semester/department/class #/section). And, setting up next year's courses is simple. Just change the year, semester and section. There's no need to change the audience, department or class #.

Variations - while we feel the ACEware course coding scheme is the most efficient system, organizations can devise their own procedure as long as they follow three rules:

1. The maximum size of the course code is 12 characters.
2. Each different course record entered must have a unique course code.
3. Keep all codes the same length (i.e. use four digits for all department codes). If you number your courses from 1-999, fill in the starting numbers with leading zeros (e.g., 001, 099).

Workshop Codes

Your workshop coding scheme should aid in generating reports and registering students. For those reasons, ACEware suggests generating workshop codes using the following format: AA01

Day	Time Period	Session in Time Period
A	A	01

1. Day (A=Mon, B=Tue, C=Wed, etc.)
2. Time Period (A=8am-9am, B=9am-10am, C=10am-11am, etc.)
3. Sessions in Time Period (01=session 1 in time period A, 02=session 2 in time period A, etc.)

Sample Workshop Schedule

Day	8:30-10:15	10:30-12:15	1:30-3:15	3:30-5:15
Monday	AA01 (session 1)	AB01 (session 1)	AC01 (session 1)	AD01 (session 1)
	AA02 (session 2)	AB02 (session 2)	AC02 (session 2)	AD02 (session 2)
Tuesday	BA01 (session 1)	BB01 (session 1)	BC01 (session 1)	BD01 (session 1)
	BA01 (session 2)	BB02 (session 2)	BC02 (session 2)	BD02 (session 2)
Wednesday	CA01 (session 1)	CB01 (session 1)	CC01 (session 1)	CD01 (session 1)
	CA02 (session 2)	CB02 (session 2)	CC02 (session 2)	CD02 (session 2)

What does this coding scheme do for you?


Your workshops will be sorted first by day, then by time period, then by session. Registration staff can easily tell which sessions are offered in each given time period, and guarantee individuals enroll in only one workshop per session. It also alerts staff to any additional fees--this allows them to notify individuals of those additional fees before enrolling them.

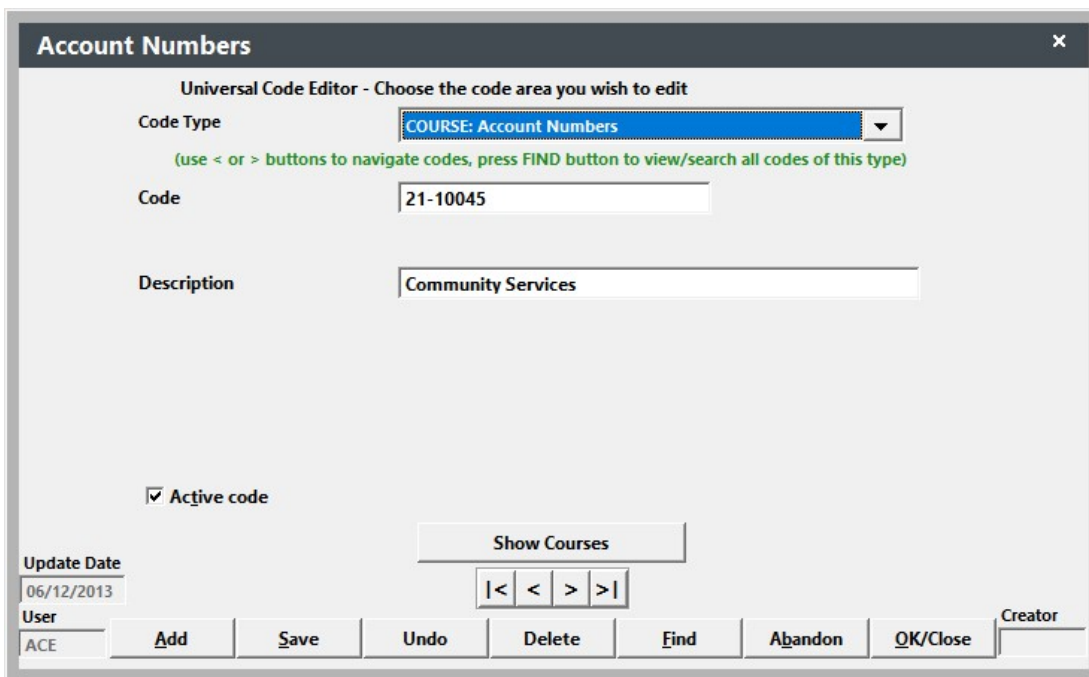
Descript/Info –Catalog code for workshop. Add edit workshop catalog codes from [Module > Catalog > Catalog Codes](#).

Fee Description – Workshop (Tuition) Fee Descriptions for workshop. This list is generated from FEES: Course Main Fee Descriptions on [Module > Codes](#).

Codes Screen (Module > Codes)

Most codes are added/edited from the [Codes](#) screen. Access the [Codes](#) screen by:

1. Clicking the [Add/Edit Codes](#) button on the Main Toolbar: 
2. Selecting [Module > Codes](#).



Account Numbers [X]

Universal Code Editor - Choose the code area you wish to edit

Code Type: COURSE: Account Numbers

(use < or > buttons to navigate codes, press FIND button to view/search all codes of this type)

Code: 21-10045

Description: Community Services

Active code

Show Courses

Update Date: 06/12/2013

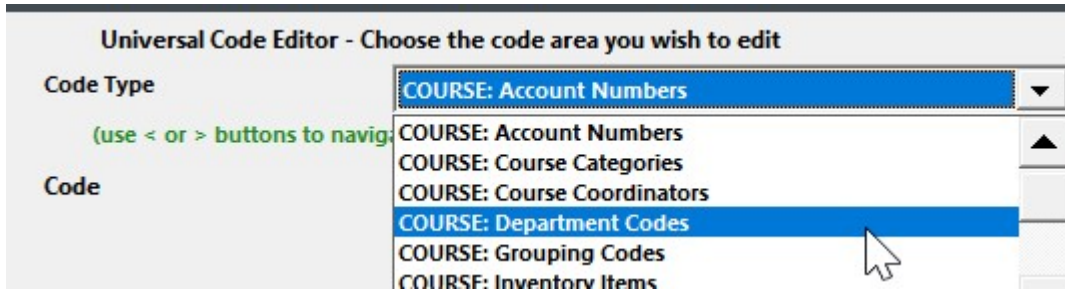
User: ACE

Navigation: |< < > >|

Buttons: Add, Save, Undo, Delete, Find, Abandon, OK/Close

Creator: []

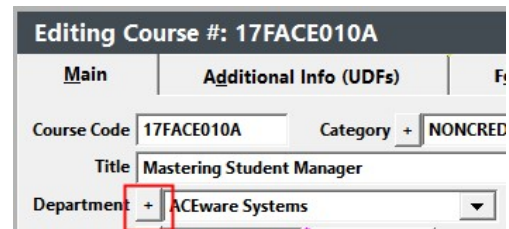
3. Select the code list you want to edit from the *Code Type* drop down list.



4. Click the **Find** button to select a specific code for that Code Type, or click the **Add** button to add a new code for the code type.

You can also add a new code for a specific code type from the module record by clicking the Plus sign [+] button next to the appropriate field.

This opens the **Codes** screen for the particular code. You are already placed in 'Add' mode so enter the *Code* and *Description* in the appropriate fields then click the **OK/Close** button to save the new code and close the **Codes** screen. The new code will now be available in the Code list (drop down menu).



User Defined Fields

The following modules offer user defined fields that your organization can use to collect data specific to your organization (e.g. license #, High School, etc.).

- Names – 5 of each data type (character, date, logical, and numeric).
- Course – 4 of each data type
- Registration – 4 of each data type
- Faculty Manager – 4 of each data type
- Pay – 2 character type fields and 1 date type field.

User Defined Fields are displayed on the module's **ADDITIONAL INFO** tab:

Edit Name Information for: Charles Havlicek ID #: X00135433

Main | **Demographics** | **Comments/History *** | **Additional Info (UDFs)** | **Credential ***

Character Fields

License #	646549756D
High School	

Financial Aid

Logical Fields

Alumni	<input type="checkbox"/>
Permit	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>

Date Fields

Mem Since	01/18/1986
Hire Date	//
	//
	//
	//

Numeric Fields

Donations	0.00
	0.00
	0.00
	0.00
	0.00

Enabling/Labeling User Defined Fields

To enable and label User Defined Fields:

1. Select **Tools > Password Maintenance**.
2. Click the **User Defined Fields** button to open the **User Defined Fields** screen:

User Defined Field Setup

Names | **Course** | **Register** | **Instructor** | **Pay**

Enabled

<input checked="" type="checkbox"/> Character Field 1	License #	<input checked="" type="checkbox"/> Logical (Yes/No) Field 1	Alumni
<input checked="" type="checkbox"/> Character Field 2	High School	<input checked="" type="checkbox"/> Logical (Yes/No) Field 2	Permit
<input type="checkbox"/> Character Field 3		<input type="checkbox"/> Logical (Yes/No) Field 3	
<input type="checkbox"/> Character Field 4		<input type="checkbox"/> Logical (Yes/No) Field 4	
<input type="checkbox"/> Character Field 5		<input type="checkbox"/> Logical (Yes/No) Field 5	

Enabled

<input checked="" type="checkbox"/> Date Field 1	Mem Since	<input checked="" type="checkbox"/> Numeric Field 1	Donations
<input checked="" type="checkbox"/> Date Field 2	Hire Date	<input type="checkbox"/> Numeric Field 2	
<input type="checkbox"/> Date Field 3		<input type="checkbox"/> Numeric Field 3	
<input type="checkbox"/> Date Field 4		<input type="checkbox"/> Numeric Field 4	
<input type="checkbox"/> Date Field 5		<input type="checkbox"/> Numeric Field 5	

Edit UDF Display | **OK/Close** | **Abandon**

3. Select the appropriate tab.
4. Check the boxes of the fields you intend to use then enter labels for the fields in the box to the right of the field. Notes:
 - UDFs are user specific—you must enable the fields for each user who will need to access them (you can do this with the Top Dog option—see step 6).
 - UDF Labels are global--they are labeled the same for every user.
5. Click the **OK/Close** button to save your changes and close the screen.
6. If desired, when you are returned to the **Password Maintenance** screen, you can use the Top Dog option to assign your User Defined field preferences to all users (see page 6 for more information about the Top Dog option).

Note: the User Defined Fields screen can also be accessed from the module's Preferences tab with the **UDF** button.

Data Validation in User Defined Fields

You may set up User Defined fields for data validation by prefacing the label with a plus sign (+) [e.g. +Attendance].

Names	Course
Enabled	
<input checked="" type="checkbox"/> Character Field 1	License #
<input checked="" type="checkbox"/> Character Field 2	High School
<input checked="" type="checkbox"/> Character Field 3	+Attendance

You must also set up the Validation Codes. To do so:

1. Open a module record (e.g. for Name UDFs, open a Name record).
2. Select the **ADDITIONAL INFO** tab.
3. The field you set up for data validation will now have a Plus Sign [+] button to the left of the field. Click it to enter the values for the field.

Main	Demographics	Comments/History *	Additional Info (UDFs)
Character Fields			
License #	646549756D		
High School			
+Attendance			

4. The **User Defined Field Code** screen opens for you to create your codes. Enter the Code and description then click the **Save** button to save the code.
5. Click the **Add** button to add the next code.
6. Continue steps 4-5 until you have added all the codes.
7. Click the **OK/Close** button to close the screen and return to the **User Defined Fields** screen.

Displaying Names User Defined Fields on Names Screen

Organizations have the ability to display the entries for some of the Name User Defined Fields on the **Names** screen.



For more information, see the see the Student Manager Topics > User Defined Fields > Displaying UDFs on Names Screen Coding Options topic in the Online Help:

https://www.aceware.com/smhhelp/#Set_Up/UDF/NameUDFDisplayCoding.htm

Other User Defined Fields

Some fields on the various module screens can be relabeled for custom purposes. Fields are relabeled on the module's Preferences tab, with the Label As field.



Setting Up Optional Modules

If your organization purchased any of the following modules, you will need to perform some set up procedures to use them.

Email Module Requirements

1. SMTP Mail Server hosted on your institution's network which allows Relaying. Please note: the Email module will not function on a MAPI server.
2. Persistent connection to your SMTP Mail Server (i.e. LAN, WAN, ISDN, or DSL). The Email module will not operate with a dial-up connection.
3. Student Manager's Catalog Builder (email templates are stored in Catalog table).

Email Module Templates

The Email module uses templates for receipts. You may need to edit the header/footer paragraphs on these templates to meet your organization's needs. To do so:

1. Select **Module > Catalog > Email Templates**.
2. When the **Add/Edit Email Template** screen opens, click the **Find** button to select the appropriate receipt template.
3. Edit the Header/Footer text on the template. Note: the Body is a combination of labels and data from the registration record. Please contact your ACEware technician for help if you need to modify the Body.

4. Click the **Save** button to save your changes.

For more Email Module information, see the Email Module topic in the Online Help:

<https://www.aceware.com/SMHelp/#Email/Email.htm>

Credit Card Module

You will need to set up the Electronic Credit Card module to process credits from Student Manager. Select **Tools > Credit Card Management > Processor Settings** to open the **Processor Settings** screen.

Processor Setup [X]

Requires purchase of Credit Card Module from ACEware

Merchant ID#/Pay Service:

CC Processor Name

Card Processor Path:

Partner

Vendor Name

User Password

I use an external CC processor

Set Processor wait states:

Seconds to wait before timeout warning:

of timeouts to wait before resetting user served sequence:

Use Address Verification? Use Card Verification Value?

Reset the User Served Sequence? User: Now serving:

Hide first 12 digits of CC number in log file?

Is the Processing software on a computer (Local Computer) that is also used as a Student Manager workstation? YES NO

If a local computer is used enter machine name:

Directory where the Processor is located:

Settings

- Merchant ID#Pay Service - name of the Payment Service (e.g. TLINK6*, AUTHORIZENET*, PAYFLOWLINK*). If using a regular (non-redirect) payment service, the Merchant # may be entered in this setting.
- Card Processor Path - path to the Gatecop directory with the trailing slash at the end (e.g. r:\manager7\gatecop\). **IMPORTANT:** all Student Manager users who will be processing credit cards must be mapped to the Gatecop folder using the same drive letter (e.g. all mapped as r:\manager7\gatecop\).
- I Use an External CC Processor - check this box if you are using a redirect payment service, i.e. one that transfers you to a web site to enter the credit card information (e.g. Touchnet tLink, Authorize.net, Paypal, etc.).
- Note: because you don't enter the credit card information into Student Manager, this option will disable the Credit Card # and Expiration Date fields.
- Seconds to wait before timeout warning - how many seconds the system should wait before displaying the Timeout warning. For redirect services, we suggest a timeout value of at least 300 seconds (5 minutes).
- Partner, Vendor Name, User, and Password: these fields are ONLY used by the PayPal service when issuing refunds.

Legacy Payment Service Settings

These settings are only used for legacy services:

- CC Processor Name - code of your Credit Card Processor (e.g. VISA, .NOVA, etc.).
- Use Address Verification - check if you are set up to use Address Verification.
- Use Card Verification Value - only used for regular payment service--not redirect service. Check if your bank requires you to submit the 3 digit Card Verification number. This will add the CVV# field to the Pay screen for you to enter the number. However, for security reasons the CVV number is submitted to the payment gateway but not saved to the pay record.
- # of Timeouts to accept before the system resets the user served sequence - how many timeouts will be allowed before served sequence reset.
- Reset the User Served Sequence? - reset the user sequence to 1.
- Hide first 12 digits of CC# in log file - check if you want to hide the first 12 digits of the credit card # in the log file.
- Is the Processing software on a computer (Local Computer) that is also used as a Student Manager workstation? - If the processing software is installed on one of the Student Manager workstations, check Yes. If not, check No.
- If a local computer is used enter machine name - If you selected yes on the above setting, enter the workstation's Machine Name (available on Network Identification tab in System Settings)
- Directory where the Processor is located - If you selected Yes on the above setting, enter the workstation's payment processor software directory path (e.g. c:\pccw).

ACEweb Processor Settings

If using ACEweb, you will need to enter processor information in the ACEweb.ini.

ACEweb set up issues are not discussed in this guide. For information on ACEweb, please see the Online Reference Guide.

Enabling Validation for Users

You will also need to enable Validation for each user who will be validating credit cards in Student Manager (i.e. check the *Validate Credit Cards* box on the Preferences' Pay tab).

Student Manager Tools

Student Manager offers tools to help you keep your data in tip-top shape.

- System Information - find out the number of records you have in each database, when the last update occurred in each database, or computer/user information
- Pack/Reindex - rebuild database indexes and remove records that are marked for deletion.
- Area Code Update Utility - update area codes on existing Name records.
- Zip Code Updates – update and add new zip codes to your Zip code database.
- Zap Charge – clear balances for particular courses

For more information about Maintenance tools, see the Maintenance topic in the Online Help:

<https://www.aceware.com/SMHelp/#Maintenance/SMMaintenance.htm>

Data Cleanup Tools

Change Course titles, Location records, Firm records, Code Areas, and Catalog records. You can also cleanup some types of duplicate and orphan records.

- Address Cleanup - proper case Name fields and set standardized abbreviations in address fields.
- Broken Firms - fix broken firm links on Name records.
- Catalog Records - edit catalog/workshop codes and titles.
- Code Areas - edit and delete Student Manger codes.
- Course Code Transmogrification - mass edit course numbers on existing course records.
- Firms - edit and combine Firm records.
- Locations, Course Names, Fees - edit Course Titles, Building/Room Names, and [Main] Registration Fee Descriptions.
- Name Interest Codes - remove blank, orphan and duplicate Interest Codes from Name records.
- Orphan Registrations and Payments - create course records and name records and move any orphaned records to them.
- The Catch-All – runs several cleanup tools including deleting duplicate registrations, names with same ID #, and course/name/register UDF records.

For more information about Cleanup tools, see the Data Cleanup Tools topic in the Online Help:

<https://www.aceware.com/SMHelp/#Maintenance/SMCleanup.htm>

Combining Names

When two records exist for the same person, combine them into one and delete the duplicate.

1. Open the record you want to keep and copy the ID #.
2. Open the record to delete and replace the ID # with the one you copied.
3. The system will ask you to confirm the SSN/ID # change. Click the **Yes** button.

4. On the warning window, click the **Combine Names** button.
5. The system will ask you to confirm your intent to combine records. Click **Continue**.

Combining a Series of Names

You can combine a series of names with the Name Combine tool. To run it, select **Tools > Data Cleanup > Combine Names**.

Combining Other Records

You can also combine duplicate faculty, firm, and location records. For more information, see the Combining Duplicate Records topic in the Online Help:

<https://www.aceware.com/SMHelp/#Maintenance/Combining.htm>

Removing Records Marked for Deletion

Student Manager has a safety feature that does not immediately remove records marked for deletion. For example, if you deleted a name record in the morning then realized later that you had deleted the wrong record, you can pull up the deleted record and ‘undelete’ it.

Because of this safety feature, it is necessary to run a special procedure called “Pack” to remove records marked for deletion. To run the Pack procedure:

1. Confirm that all other users are out of Student Manager by selecting **Tools > Show Users**.
2. Select **Tools > Database Admin > Pack/Reindex**.
3. On the **Pack/Reindex** screen, check the *Select All Files* and *Pack* boxes.
4. Click the **Run** button to start the procedure.

The system will now reindex all your files and remove any records marked for deletion.

Backing Up Data

Even though your network administrator may be backing up data, we strongly encourage to develop your own back up procedures, at least of your Student Manager data. Network data backup routines can break down, and your data will not be backed up until they are fixed. Also, if you have a data issue (e.g. a file becomes corrupted) it’s much quicker and easier for you to retrieve the file from your back up rather than waiting on your network technician to retrieve it from the server back ups.

Student Manager offers an integrated Back Up tool. The tool creates a zip file of all your data tables that can be placed on a CD or USB drive. For more information, see the Backing Up Student Manager Data topic in the Online Help:

<https://www.aceware.com/SMHelp/#Maintenance/BackingUp.htm>

Student Manager Reporting

Student Manager provides an integrated report system and over 290 ready-to-run reports. The built-in report writer allows you to modify any of those reports, or create new ones. For a full list of reporting tools, see the Student Manager Reporting topic in the Online Help:

<https://www.aceware.com/SMHelp/#Reporting/Reporting.htm>



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Resources

ACEware Website: www.aceware.com

Online Help: www.aceware.com/smhelp

Student Manager Resources: www.aceware.com/customers/smresources.shtml

ACEweb Resources: www.aceware.com/customers/awresources.shtml

ACEware Newsletter Archive: www.aceware.com/company/newsletterarchive.shtml

ACEware Webinar Archive: www.aceware.com/webinars/

Training Options: www.aceware.com/events/trainOptions.shtml