Student Manager 8.0

NEW USER GUIDE

Flexible, Scalable, Powerful

Student Registration Software

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Student Manager Demo

This guide is meant to be used with a current copy of the Student Manager Demo. Examples and exercises use records from the demo dataset.

We suggest you download a current demo before using the guide. You can download the demo on our ACEware website:

https://www.aceware.com/demos/sm.shtml

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Student Manager New User Guide

Welcome to the Student Manager application, the ultimate registration management system. This guide gives you an overview of Student Manager, telling you how to launch the program, navigate to the various modules, add/edit/find/delete records, and run reports.

Note: you can find more detailed information in the Online Reference Guide:

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

Launching Student Manager

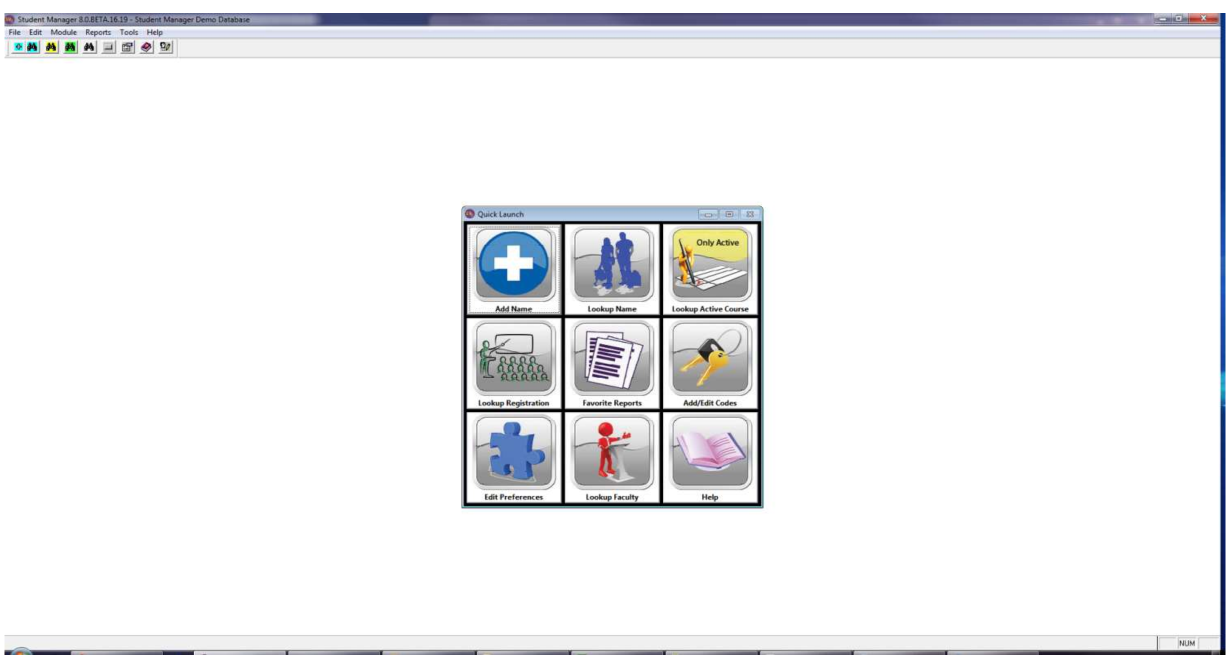
To launch Student Manager:

1. Double-click the icon on the computer's desktop to start Student Manager: (or wherever your system administrator placed the shortcut)

2. The **Login** screen opens. Enter the login information given to you by your Student Manager Administrator, then press the **Enter** key to log in.

   Note: if you are using the Single-User version and have passwords disabled, this step will be skipped.

You'll now be at the **Main Student Manager** screen.



Navigation Tools

Student Manager provides the following tools to help you complete tasks.

Main Menu

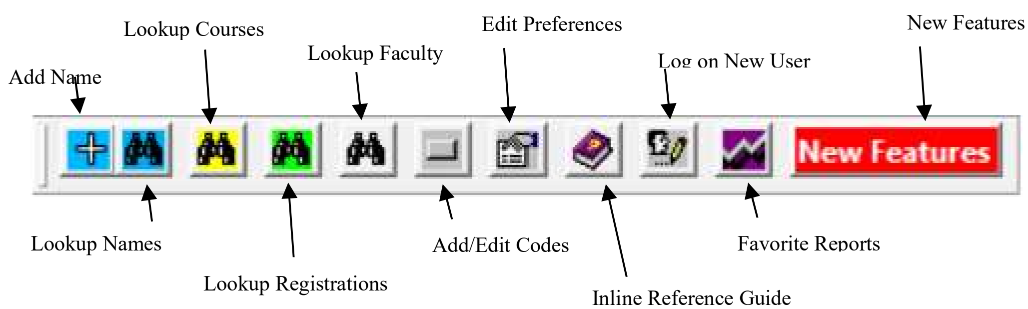
Access the following from the Main Menu*:

- **File** – Create new records, Find records, Save changes to current record, and Exit Student Manager.
- **Edit** – Undo, Copy, Edit, Paste, Clone and Paste Name record, Preferences and User Profile.
- **Module** - Access Names, Course, Registration, Firms, Zip Codes, Locations, Holidays, and Optional modules.
- **Reports** - Run reports.
- **Tools** - Import/Export Reports (Report Tools), Browse databases (Database Admin), Set/Remove filters, Import/Export data, Update Counts, Manage Credit Cards, Set up Users (Password Maintenance), and check for Callbacks and Reminder Notes.
- **Help** - Access Help, Technical Support Information, the Student Manager website, and Student Manager System information (About Student Manager).

*See Appendix F: Student Manager Menu maps for menu maps.

Main Toolbar

Perform the following actions with the button on the Main Toolbar:



Student Manager Quick Launch

Perform common actions from the Quick Launch screen.

- Add a Name record
- Lookup an Active Name record
- Lookup an Active Course record
- Lookup Registrations
- Access Favorite Reports
- Add/Edit Codes
- Edit Preferences
- Lookup Faculty records
- Access Help

Module Buttons

Student Manager screens (i.e. Course, Names, Registration, etc.) provide you with a Navigation Toolbar. Use the buttons to perform the following actions:

I<	-- Moves to the first record of the database (Top).*
<	-- Moves forward one record (Next).*
>	-- Moves backward one record (Previous).*
>I	-- Moves to the last record of the database (Bottom).*
Add	-- Create a new record.*
Save	-- Saves any edits you have made.
Undo	-- Undo any edits made since your last save.**
Delete	-- Marks the record for deletion.
Find	-- Locates a specific record from the database.*
Abandon	-- Cancels any edits and closes the screen.**
OK/Close	-- Saves edits and closes the screen.*

*These buttons SAVE changes made before navigating to the next record.

**These buttons close the screen WITHOUT saving any changes made to the record.

Keyboard Conventions

- Press the Alt key + the underlined letter to activate menu items or buttons (e.g. Alt+F opens the File Menu)
- Press the Esc key to close windows without navigational buttons or to escape without saving.
- Move forward through fields by pressing the Tab key.
- Move backward to fields by pressing the Shift + Tab keys.

For a complete list of keyboard shortcuts, see Appendix E.

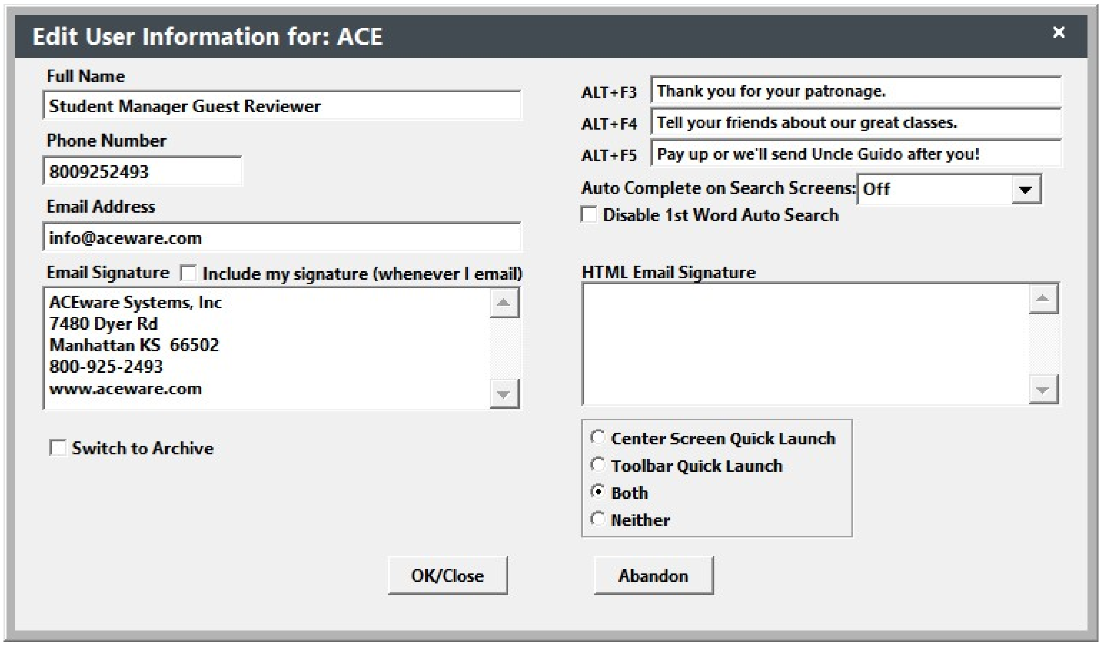
Mouse Conventions

- Select Menu items and Buttons with one click of the mouse button.
- Remove assessed items (e.g. Interest codes assigned in a Name record) from windows by double clicking with the mouse button.

Editing Your User Information

Before you begin working in Student Manager for the first time, you should ensure your User Information is correct and set your User preferences.

To view/edit your User Information, select **Edit | My User Profile**.



After editing the information, click the **OK/Close** button to save your changes and close the screen.

Adding Records

There are several ways to add records such as a Name, Course, Instructor, etc.:

- **File | New Menu** - select File | New | then the appropriate record type to create a new record in that particular table. For example, to create a new Name record, select **File | New | Names**.
- **Module Menu** – select Module | appropriate module | Add … to create a new record. For example, to create a new Course record, select **Module | Courses | Add Course**.
- **From the Module Screen** – if you have the appropriate screen open, you can click the **Add** button in the module's Button bar to create a new record.
- **Shortcut Keys** – use shortcuts key to create new records. For example, to create a new Name record, press **Alt+A**. A complete list of shortcut keys is in Appendix E.

Entering Data in Records

Here are some hints to help you easily enter data in records:

- **Field Capitalization** - many field entries are automatically capitalized (e.g. First Name). For this reason, we strongly discourage using the using the **CAPS LOCK** key when entering data.
- **Move to Next Field** - press the **Tab** key to move to the next field. For example on a new Name record, tabbing will move you from First Name to Middle Initial to Last Name.

- **Move to Previous Field** - press **Shift+Tab** to move to a previous field. For example, to move back from the Last Name field to the First Name field, press **Shift+Tab** twice.
- **Removing a Value from a drop down type field** – to remove a value from a field with a drop down list, click into the field then press the **Delete** key. The value is removed from the field.
- **Checkboxes** – check/uncheck a box by clicking it with your mouse or pressing the **Space Bar** when you tab to the checkbox. Note: a highlighted box's label is surrounded by a dotted line.

Saving Changes to Records

You have several options to save changes to a record:

- **File | Save** – you can save any changes to the open record by selecting **File | Save**.
- **File | Save and Close** - you can save any changes to the open record AND close the screen by selecting **File | Save and Close**.
- **Save Button** – you can save any changes to the open record by clicking the **Save** button in the module's Navigation Toolbar.
- **OK/Close Button** - you can save any changes to the open record AND close the screen by clicking the **OK/Close** button on the module's Navigation Toolbar .
- **Other Navigation Buttons** - the **Top**, **Prior**, **Next**, **Bottom**, **Add** and **Find** buttons also save changes to the record before moving on to the next record you select.

Closing Record Without Saving Changes

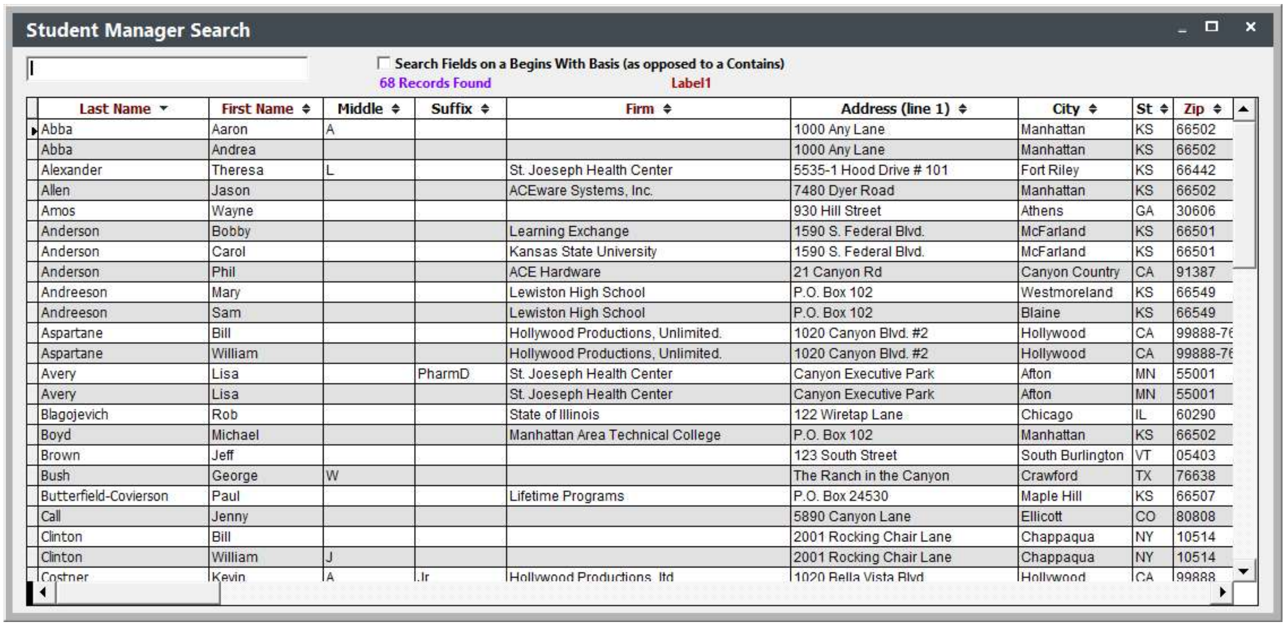
To close a record without saving the changes to it, you MUST click the **Abandon** button or press the **ESC** key. If you are asked to confirm the Abandon routine, click the **Yes** button.

Finding Records

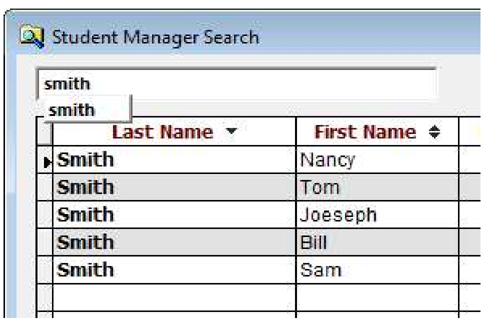
You have several options to find a particular record:

- Click one of the Lookup buttons on the Main Toolbar (e.g. **Lookup Name**).
- Select a Lookup item from the File | Find Menu (e.g. **File | Find | Name**).
- Click the **Find** button on a module screen (e.g. **Find** button on the **Names** screen).

When you select a Find routine, the STUDENT MANAGER SEARCH window open with the list of records in the selected table so you can search for the one you want to open.



Last Name	First Name	Middle	Suffix	Firm	Address (line 1)	City	St	Zip
Abba	Aaron	A			1000 Any Lane	Manhattan	KS	66502
Abba	Andrea				1000 Any Lane	Manhattan	KS	66502
Alexander	Theresa	L		St. Joeseph Health Center	5535-1 Hood Drive # 101	Fort Riley	KS	66442
Allen	Jason			ACEware Systems, Inc.	7480 Dyer Road	Manhattan	KS	66502
Amos	Wayne				930 Hill Street	Athens	GA	30606
Anderson	Bobby			Learning Exchange	1590 S. Federal Blvd.	McFarland	KS	66501
Anderson	Carol			Kansas State University	1590 S. Federal Blvd.	McFarland	KS	66501
Anderson	Phil			ACE Hardware	21 Canyon Rd	Canyon Country	CA	91387
Andreeson	Mary			Lewiston High School	P.O. Box 102	Westmoreland	KS	66549
Andreeson	Sam			Lewiston High School	P.O. Box 102	Blaine	KS	66549
Aspartane	Bill			Hollywood Productions, Unlimited.	1020 Canyon Blvd. #2	Hollywood	CA	99888-76
Aspartane	William			Hollywood Productions, Unlimited.	1020 Canyon Blvd. #2	Hollywood	CA	99888-76
Avery	Lisa		PharmD	St. Joeseph Health Center	Canyon Executive Park	Afton	MN	55001
Avery	Lisa			St. Joeseph Health Center	Canyon Executive Park	Afton	MN	55001
Blagojevich	Rob			State of Illinois	122 Wiretap Lane	Chicago	IL	60290
Boyd	Michael			Manhattan Area Technical College	P.O. Box 102	Manhattan	KS	66502
Brown	Jeff				123 South Street	South Burlington	VT	05403
Bush	George	W			The Ranch in the Canyon	Crawford	TX	76638
Butterfield-Covierson	Paul			Lifetime Programs	P.O. Box 24530	Maple Hill	KS	66507
Call	Jenny				5890 Canyon Lane	Ellicott	CO	80808
Clinton	Bill				2001 Rocking Chair Lane	Chappaqua	NY	10514
Clinton	William	J			2001 Rocking Chair Lane	Chappaqua	NY	10514
Costner	Kevin	A	Jr	Hollywood Productions, ltd	1020 Bella Vista Blvd	Hollywood	CA	99888



Finding Record

Type a search term and the system will return records containing your search term.

Date Search: enter the date in mm/dd/yy format. You can also enter a partial date, e.g. 06/02 (June 2nd).

Opening Record

Press the Tab key to move from the Search field to the list of records.

Search Keys

You will have several search keys depending on what Find Records option you are accessing. For instance, in the Find Names routine, you can search for records by Name, SSN/ID, Firm, Zip Code, Day Phone or Home Phone.

You can enter partial words. E.g. Hav Ch. Enter a space between words.

The Find routine will return records that have your search value in any of the searchable fields.

Deleting Records

You can click the **Delete** button to "mark" a record for deletion. However, the record is not removed from the table until you run a procedure called "Pack" (see Student Manager Help for more information about the Pack procedure).

Deleting Parent/Child Records

You CANNOT delete "parent" records until you have deleted all associated "child" records. For example, you cannot delete an individual's Name record if the individual has enrolled in courses. You must first delete the registration records then you can delete the Name record.

Deleting Payments

We strongly suggest you DO NOT delete payment records. It's always better to void a record rather than delete it. Voiding a payment removes it from Total Paid routines in Student Manager (i.e. Registration screen, Courses Taken window, etc.). It keeps the payment record in your system so you can account for all receipt/invoice numbers with your auditors.

Exiting Student Manager

Before exiting Student Manager, you must close all module screens and/or reports. Once you close the module screens, you can exit Student Manager in any of the followings ways:

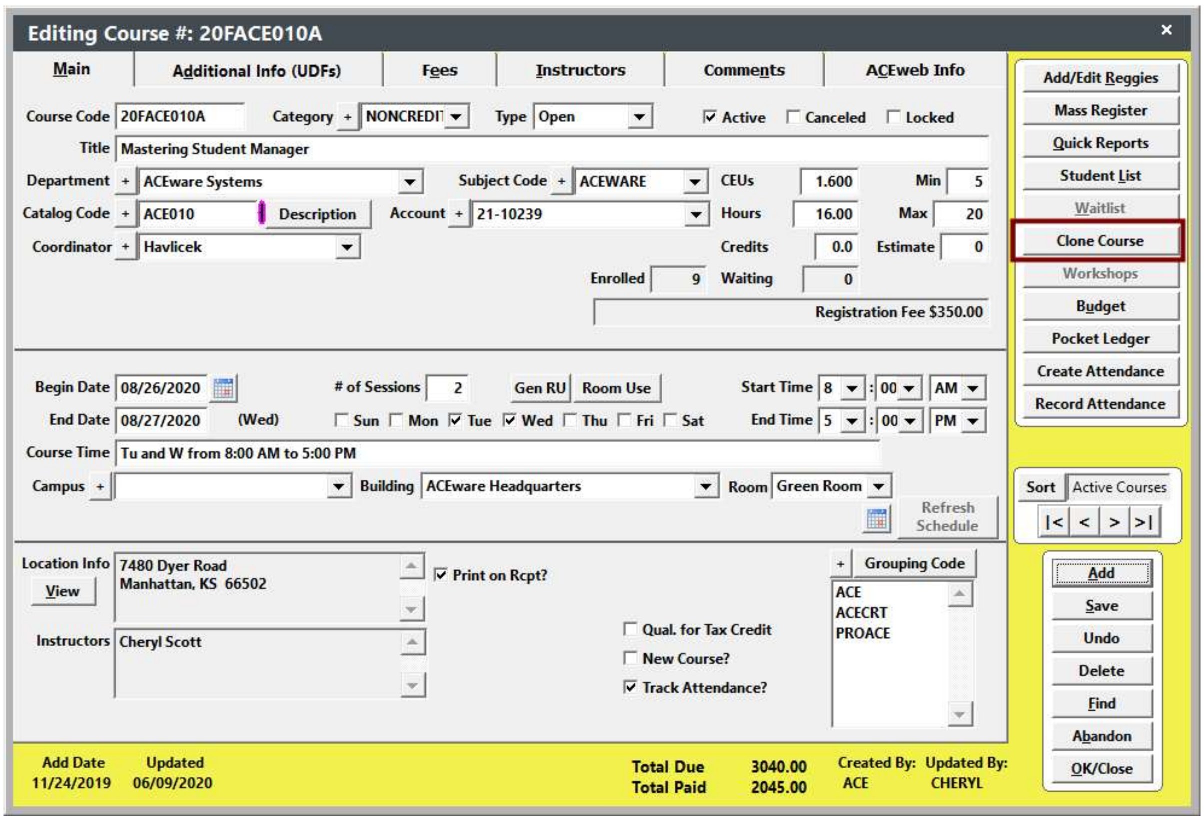
- **File Menu** – select **File | Exit** to exit Student Manager.
- **Shortcut Key** – press **Alt+Q** to exit Student Manager.
- **Windows Exit Button** - click the **X** button in the top right of the Student Manager screen (standard Windows button).

Creating/Cloning Courses

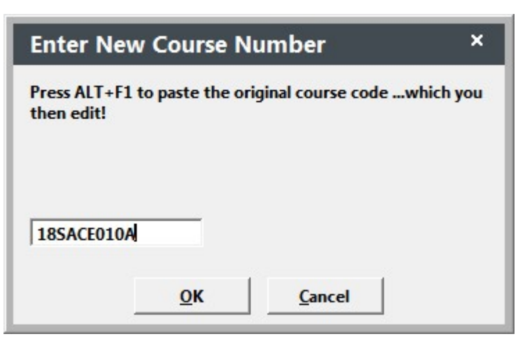
You have two ways to create a new course record. Which you choose will depend on if you have previously offered the course.

- **New Courses** (not previously offered) – if you have never offered the course before, you can add a new course record using one of the Add options discussed on page 7.
- **Previously Offered Course** – if you have offered the course before, you can 'clone' the course record. Cloning a course allows you to copy the course information into a new course record (including fees, location, instructor, and notes). To clone a course:

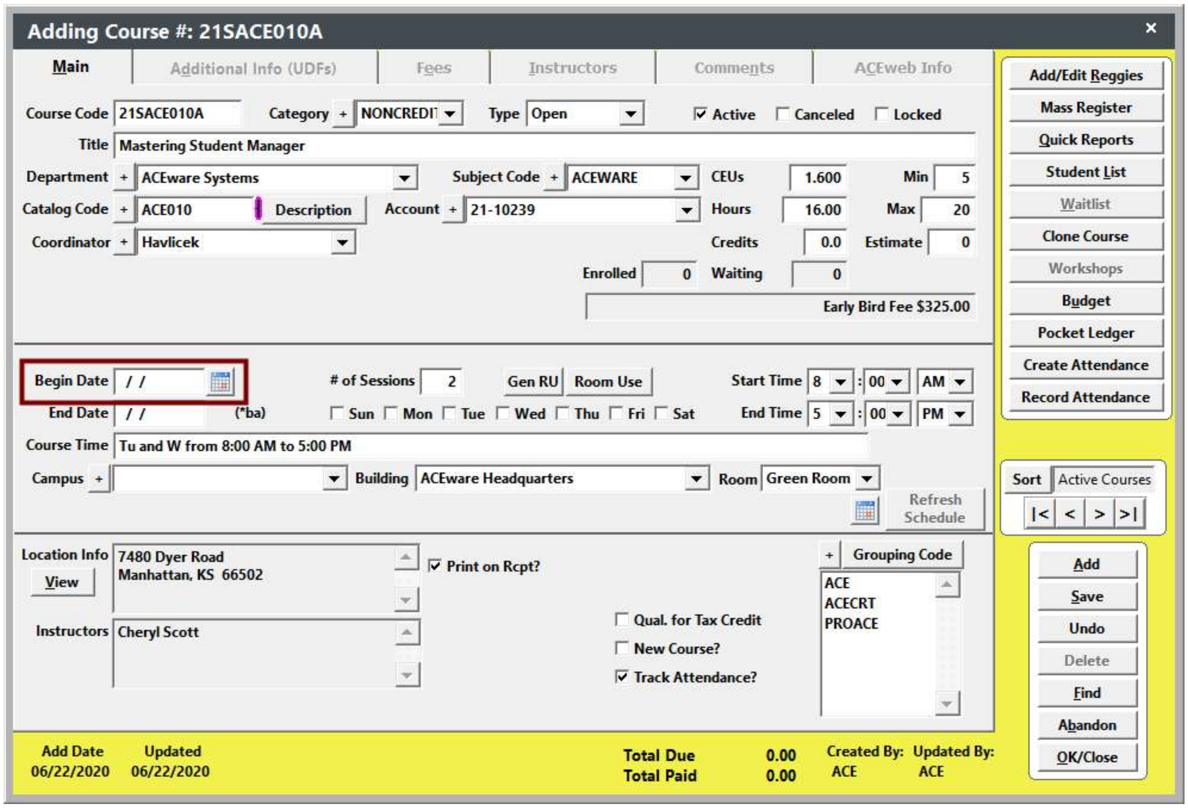
1. Open the course record you want to clone.
2. Click the **Clone Course** button.



3. Enter a course number for this course then click the **OK** button. Note: course numbers must be unique (i.e. can't be assigned to another course in your system).



4. The system now creates a new course record with the course number you entered and the data from the cloned course, putting the cursor in the *Begin Date* field for you to set the begin date of the new course.



5. Enter the *Begin Date* and check the appropriate *Day* boxes. The system will calculate the End Date for you.

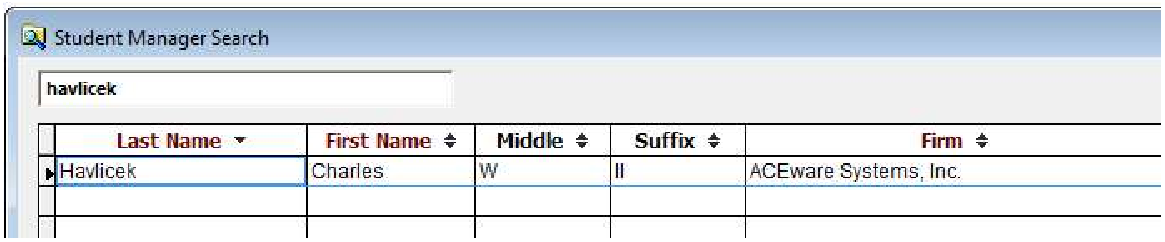
6. Click the **Save** button. Once you save the record, you can edit any necessary information, i.e. time, location, fees, instructors, etc. (note: the other course tabs are not available until you click the **Save** button).

For more detailed information about creating/cloning courses, see the Student Manager Reference Guide (instructions to access the Guide are on page 3).

Registering an Individual in a Course

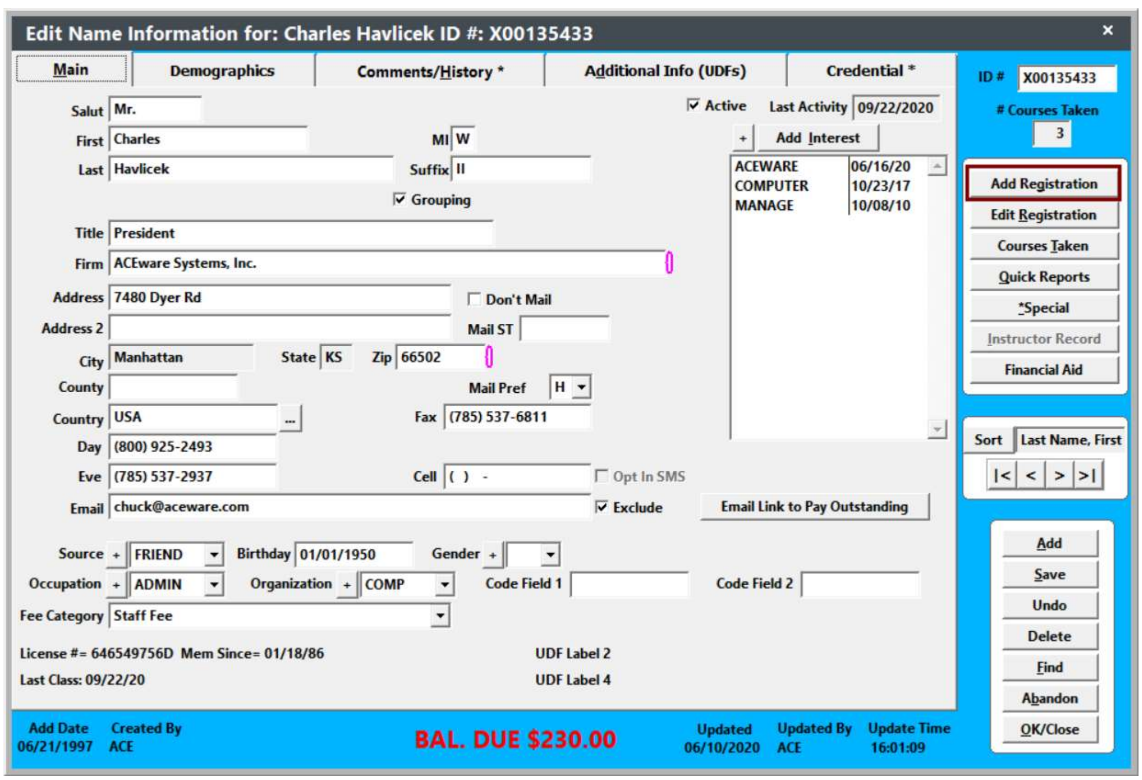
The following is the suggested method to enroll an individual in a course:

1. Look up the individual's Name record* (using one of the Find methods listed in the Finding Records section, page 9).



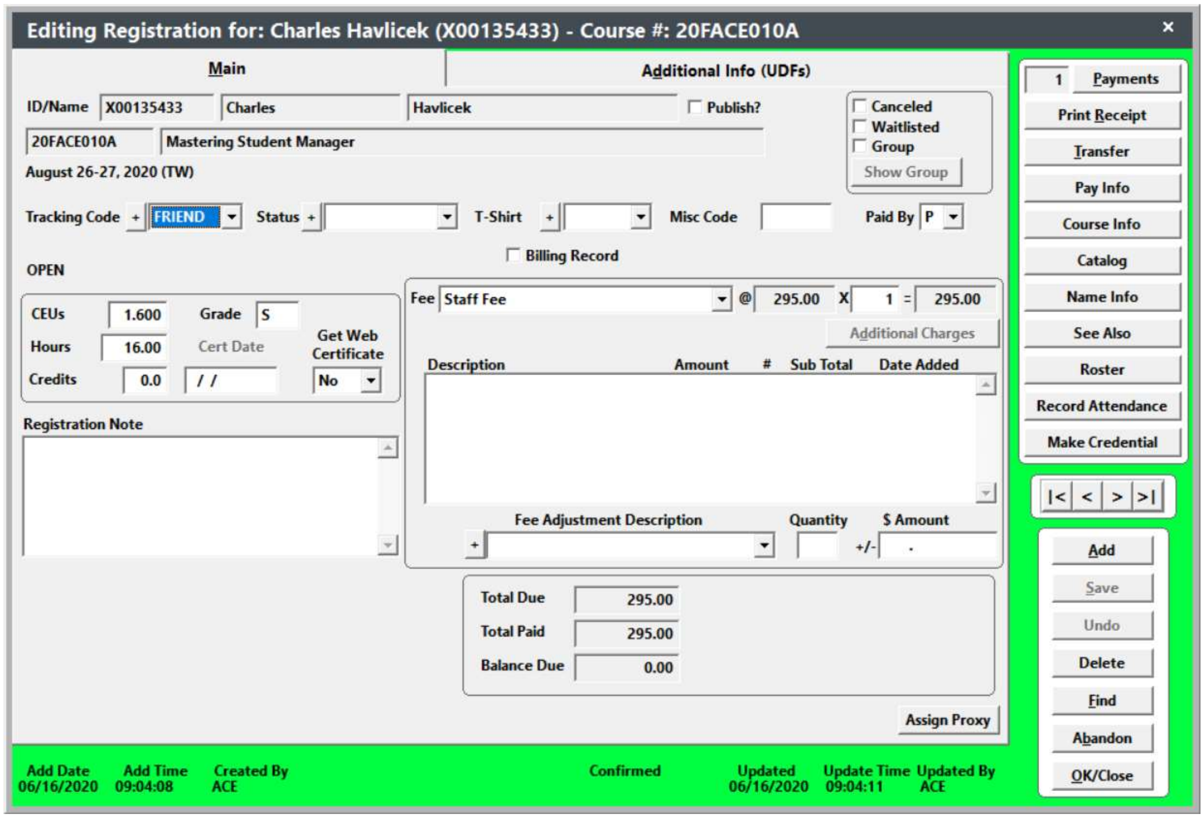
*If you don't find a record for the individual, press **ESC** to close the FIND window then select one of the Add options (on page 8) to add a new Name record. Once you create the new record, continue to step 2.

2. Click the **Add Registration** button



3. Select the appropriate course from the SELECT COURSE-NEW REGISTRATION window.

4. The registration screen now opens. Add/edit any necessary information (e.g. enter a tracking code, add Additional Charges etc.).

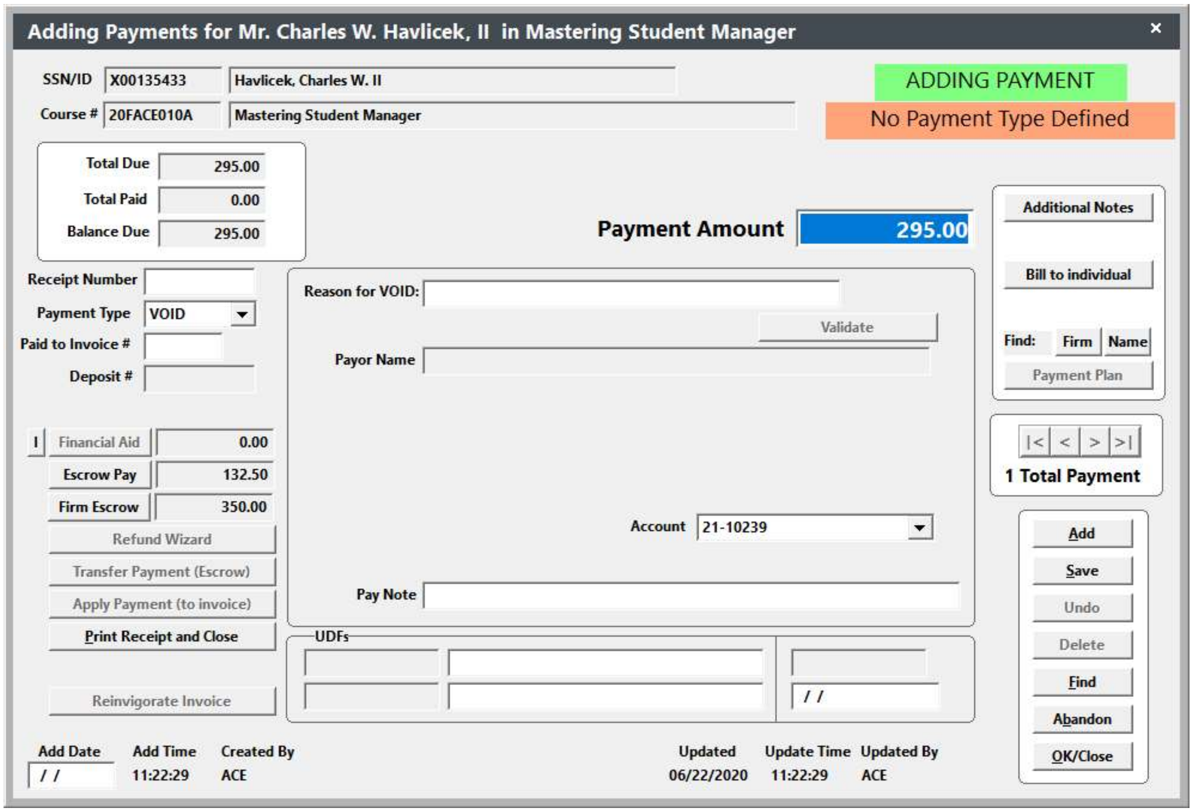


5. Click the **Save** button to save the new registration.

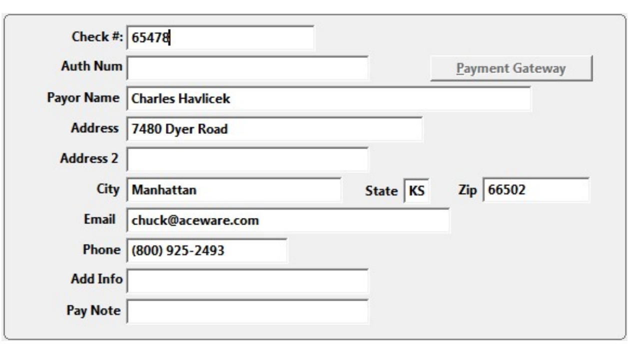
Making a Payment to the Registration

To make a payment to the registration:

1. On the **Registration** screen, click the **Payments** button. This opens the **Payments** screen in 'Add' mode since this is the first payment you've made to the registration.



2. The total amount due is auto-entered for you. If the individual is paying the total amount due, continue to step 3. If not paying the total due, adjust the *Payment Amount* field accordingly.
3. Select the payment type from the *Payment Type* list (i.e. Cash, Check, etc.). Once you select the payment type, the Payment Details fields appear:
4. If necessary edit the payment details (e.g. if the firm is paying, click the **Paid by Firm** button to update the details with the firm information).

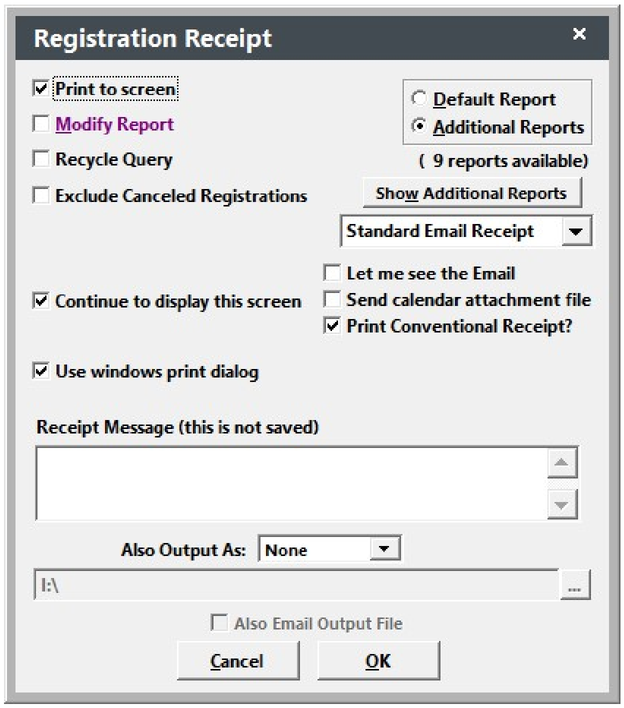


5. Click the **Save** button to save the new payment.

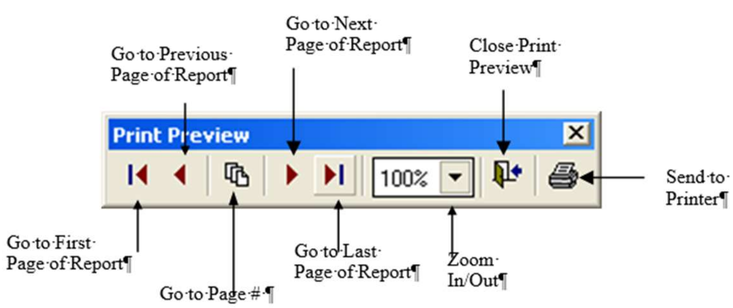
Printing a Receipt

To print a receipt:

1. On the **Payment** screen, click the **Print Receipt and Close** button. This opens the the RECEIPT PRINTING OPTIONS window.
2. Select your printing options then click the **OK** button.



3. The PRINT PREVIEW window opens for you to preview the report. Click the **Send to Printer** button on the Print Preview toolbar to print the report.



4. To close the Print Preview and print the receipt, click the **Close Preview Window** button.

Running Reports

Student Manager provides over 250 pre-designed report templates for you to view/print the information in your database. Run reports from these areas:

Quick Reports (Module Quick Reports and Receipts)

You may run a report for a specific record with the Quick Reports button on the module screen:

- **Course** screen **Quick Report** button – print rosters, name tags, mailing labels, certificates, course description, or faculty contracts for particular course.
- **Names** screen **Quick Report** button– print transcript, envelope, or letter for individual.
- **Registration** screen **Print Receipt** button OR **Payments** screen **Print Receipt and Close** button – print receipts for particular registration or grouped registrations.
- **Pocket Ledger** screen **Print Requisition** button – print a requisition order for the Pocket Ledger record (requires Pocket Ledger module).
- **Budget Builder** screen **Quick Repts** button – print budget reports for the for the open course.

Student Manager Reports Menu (Main Menu Item)

This is the main reporting area in Student Manager. In these report areas, you run an appropriate query to get the data you want displayed on the report. Reports are grouped according to the type of information contained in the report:

- **Accounting** – Income, Cash Box, Financial, Deadbeat
- **Demographics** –Name information, Firm information, Mailing Labels, and Transcripts
- **Courses** – Details, CEU Reporting, Course Income/Enrollment Summary, and Catalog
- **Registrations** – Registration Details, Receipts, Rosters, Transcripts, Name Tags, and Certificates
- **Faculty** – Agreements, Instructor Lists, Performance Data, Check Requests, Faculty Reports
- **Invoices** – Invoices, Aging Reports
- **Pocket Ledger** – Income/Expense Listings, Balances, Budgets
- **Workshops** – Rosters, Enrollment Summary
- **Statistics** – Names Demographic Sorting and Performance Summary, Tracking Codes, Course Data Summary and Performance Review.
- **Codes** – Student Manager Codes Listings

Special Reports

These are special reports:

- **Dashboard** - gives you a quick look at courses with low enrollment, courses full or nearly full, summary of enrollments and income (for the day, week, quarter, year), and counts of web enrollments. To run this report, press **F9** from the **Main Student Manager** screen.

- **Quick Counts** - view or print enrollment counts for upcoming courses. To run this report, press the **F2** key from the **Main Student Manager** screen.
- **Quick Room Use** –view or print room use information for upcoming courses. To run this report, press **Ctrl+F2** from the **Main Student Manager** screen.

Special Search Tools

These tools help you find records:

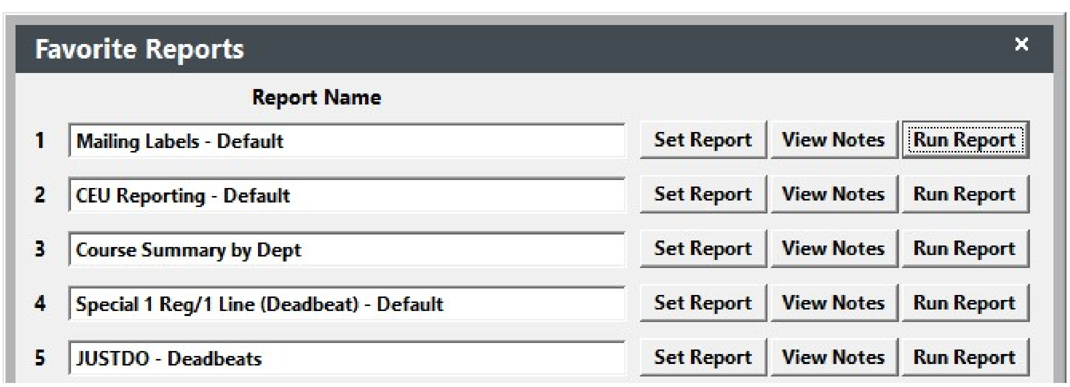
- **Name Search** – find Name records that match your search criteria. To run this report, press **F5** from the **Main Student Manager** screen.
- **Registration Search** – find Registration records that match your search criteria. To run this report, press **F4** from the **Main Student Manager** screen.
- **Faculty Talent Search** – search for faculty who meet specified criteria. To run this report, press **F3** from the **Main Student Manager** screen, the **Course** screen, or the **Faculty** screen.
- **Pay Grabber** - view/edit/print a list of payments matching your search criteria.

Favorite Reports

You can set up your favorite reports to be easily found and run. Favorite Reports can be access from:

- Click the **Favorite Reports** icon on the Main Toolbar.
- Click the **Favorite Reports** button on the Quick Launch screen.
- Select **Reports > Favorites**
- Use the keyboard shortcut **Ctrl+F1**

When the **Favorite Reports** screen opens, click the appropriate **Run Report** button.



Finding the Right Report

The following are answers to the most common questions about the Reporting system in Student Manager.

How do I start?

Before running a report, you must first determine what you want contained in your report. If you can put into words what the desired output will be, you are half way there. The output will often sound like: "I want a report that shows who has done this but not that between these dates. And I want it in this order." For instance, "I want to generate letters to all individuals who currently have a credit balance, informing them of the dollar amount of that balance and proposing that they use it for an upcoming class."

Where do I go to get the report?

Once you've decided what information you want on your report, you must determine which report to use. Begin by determining what reporting area accesses that information. For instance, to get information on registrants, you would choose the Registration reporting area--not the Faculty reporting area.

See the Report Area Guide in Appendix G for more information about Student Manager reporting areas including data available in each reporting area.

What is the difference between a query and a report?

What is a query? A query is a request for records—you're telling the system what records you want included in your report. For example, if you run a Course Number Begins query in a registration report area, the system will only return registration records for courses that begin with the value you entered.

A report is a template with the data from the records you requested (in your query) laid out in a specific format. For example, if you run a Mailing label report with an Interest Code begins query, you get all Name records that have the Interest Code you specified in your query. The report displays information from those records laid out in a mailing label format.

What is the difference between default and additional reports?

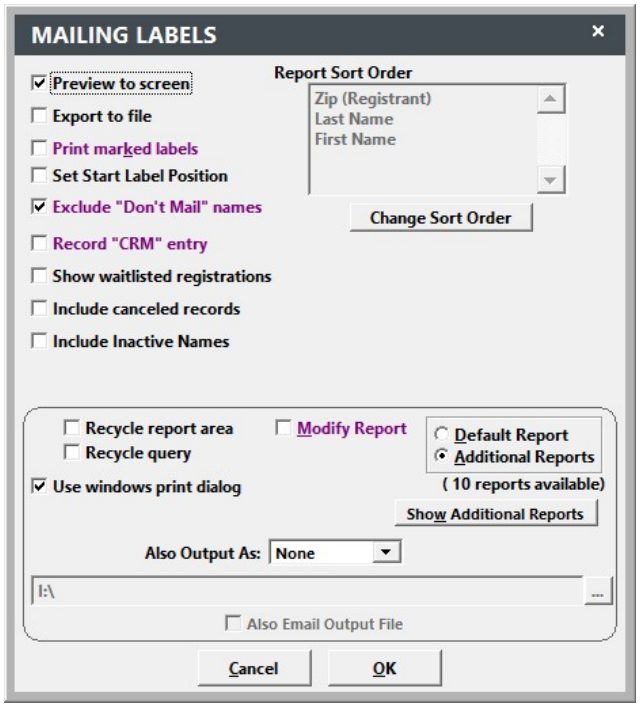
Every report area provides one default report that displays the most common elements for the particular report area. For example, the default Course Details w/fees report lists details of the course such as code, name, beginning date, and meeting times.

Most report areas also provide additional reports. These are other report templates that may display the same data as in the default report but in a different format—or—they are templates designed for specific purposes. For instance, the Course Details w/fees additional report area contains templates that allow you to print financial summaries, course setup forms, etc.

Note: you can determine which report is your default report in all report areas by modifying the report and saving it as your default report.

Printing Options Window

When selecting a report from the Reporting Menu, the report's PRINTING OPTIONS window opens.



Most of the Printing Options are available in all report areas such as *Print to screen* and *Modify report*. Some are only available in certain report areas. For instance, only areas that access registration information will display the *Show Waitlisted Registrations* option.

Here a brief description of the available printing options:

- **Print to screen** – check to see an on-screen preview of the report before sending it to the printer.
- **Export to file** – check to export the data in the report to an external file (i.e. Microsoft Excel, Text file, etc.).
- **Print New Invoices** (Invoices | Run Invoices Only) – if checked, will print invoices for all billing records which have not yet been assigned an invoice number (must have Company Invoicing module).
- **Print Marked Labels** (Demographics | Mailing Labels Only) – if checked, all Name records which have the Print Label checked are included in your report. Note: you aren't given the opportunity to run a query if you select this option.
- **Set Start Label Position** (Demographics | Mailing Labels and Registrations | Nametags) – for use when printing on a partially used label/nametag sheet. If checked, the system will allow you to enter the number of the label/nametag where you want to start printing.
- **Exclude "Don't Mail" Names** (Demographics | Mailing Labels Only) – if checked, will not include any Name record which has the Don't Mail box checked.
- **Record "CRM" Entry** (Demographics | Mailing Labels and Registrations | Receipts) – if checked, after the report runs you'll be given the opportunity to create a CRM entry for all Name records in the report (must have optional CRM Module).

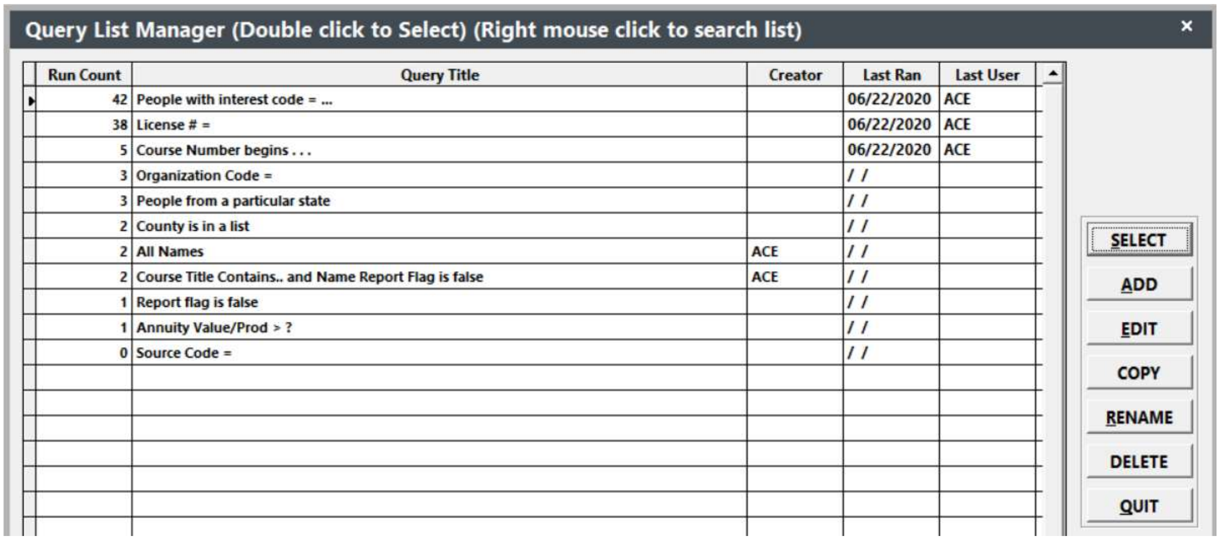
- **Default/Specify Sort Order** (Various Report Areas) – allows you to change the sort order for records included in report (e.g. change sort order of mailing labels from Zip+Last Name+First Name to State+Last Name+First Name). CAUTION: you may receive unexpected results because report grouping and justdoit functions will override your sort order options.
- **Show Waitlisted Registrations** (Registration Reports Only) – check to include waitlisted registrations in your report.
- **Include canceled records** – check to include canceled records in your report (i.e. canceled courses, registrations, etc.).
- **Include Third Party Billing Reggies** – check to include registrations marked as billing records in your report.
- **Recycle Report Area** – if checked, you'll be returned to the report area's Printing Options window after running the report. This is useful when you need to run a series of reports in the same area.
- **Recycle Query** – if checked, you'll be able to run reports in this report area with the same query. Once, again, this is useful when you need to run a series of reports in the same area and using the same criteria (e.g. courses between two dates).
- **Also Output As** – export the report in various formats (e.g. as a PDF file).
- **Modify Report** – check to modify the report. For more information, see the following section: Modifying Reports.
- **Default/Additional Report** – select the report you want to run.
- **Show Additional Reports** – click this button to see the list of user-defined reports in this reporting area.
- **Use Windows Print Dialog** – this option opens the standard Windows Print Dialog box when you print the report. You can then select the printer and printer options (i.e. number of copies, pages to print, etc.). If you don't select this option, the report will automatically be sent to the default printer when you print the report.

Note: if you want to send the report directly to the default printer and also want to print multiple copies, un-check the box then enter the number of copies in the *Number of Copies* field.

To run the report, select the appropriate options then click the **OK** button. The QUERY LIST MANAGER window now opens (unless you selected the *Print Marked Labels* or *New Invoices* options).

Query List Manager

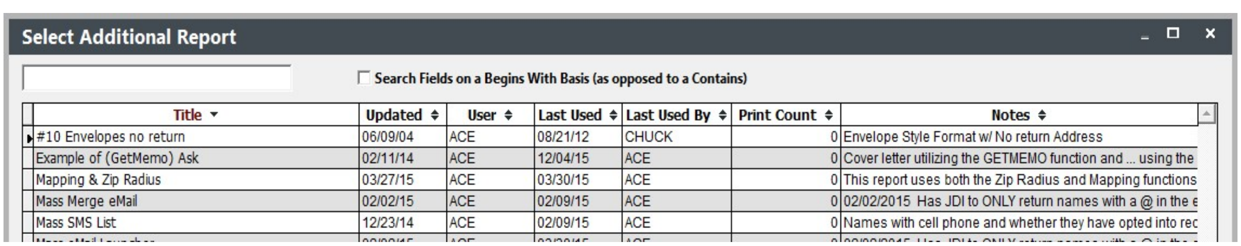
After you've selected your printing options, the QUERY LIST MANAGER window opens.



To run a query:

1. Highlight the appropriate query (e.g. Courses offered between dates).
2. Click the **Select** button—OR—press the **ENTER** key.
3. Enter the search criteria. For instance, if you selected the Courses Number begins query, enter the appropriate starting value for the course number then press the **OK** button.

4. If you selected *Additional Reports* on the PRINTING OPTIONS window, the user defined report window will open next. Select the report you want to run then press the **ENTER** key.

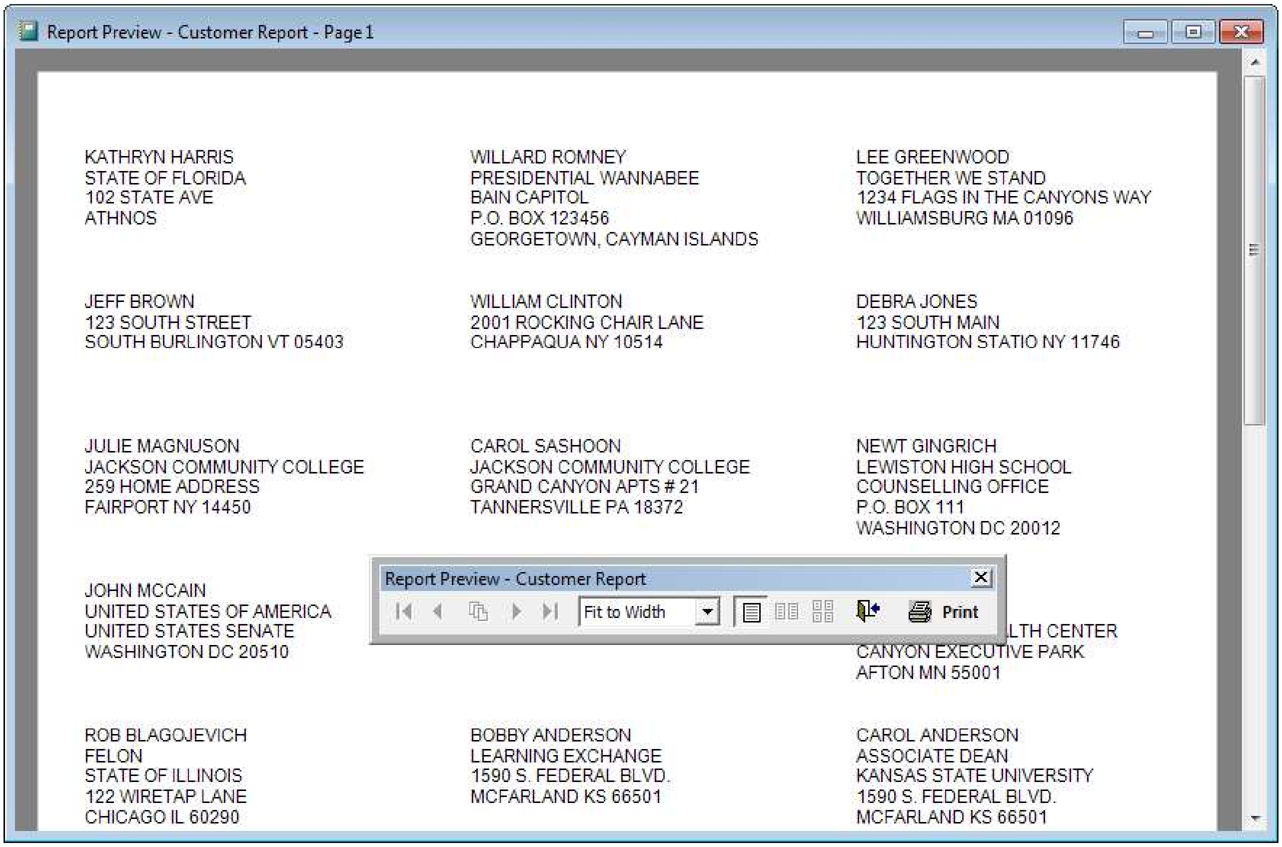


If you selected *Default Report* on the PRINTING OPTIONS window, you will not select a report. The system will go on to step 5.

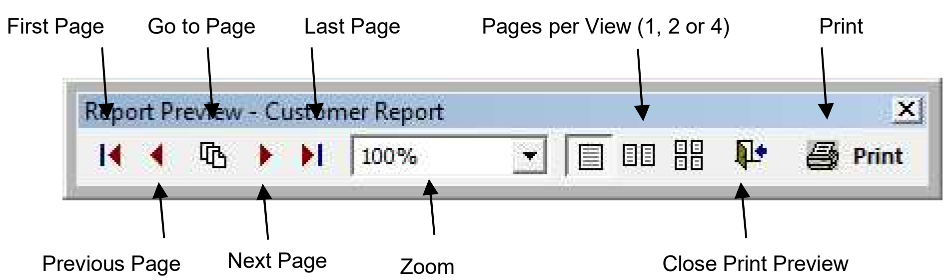
5. The PRINT PREVIEW window now opens.

Print Preview Window

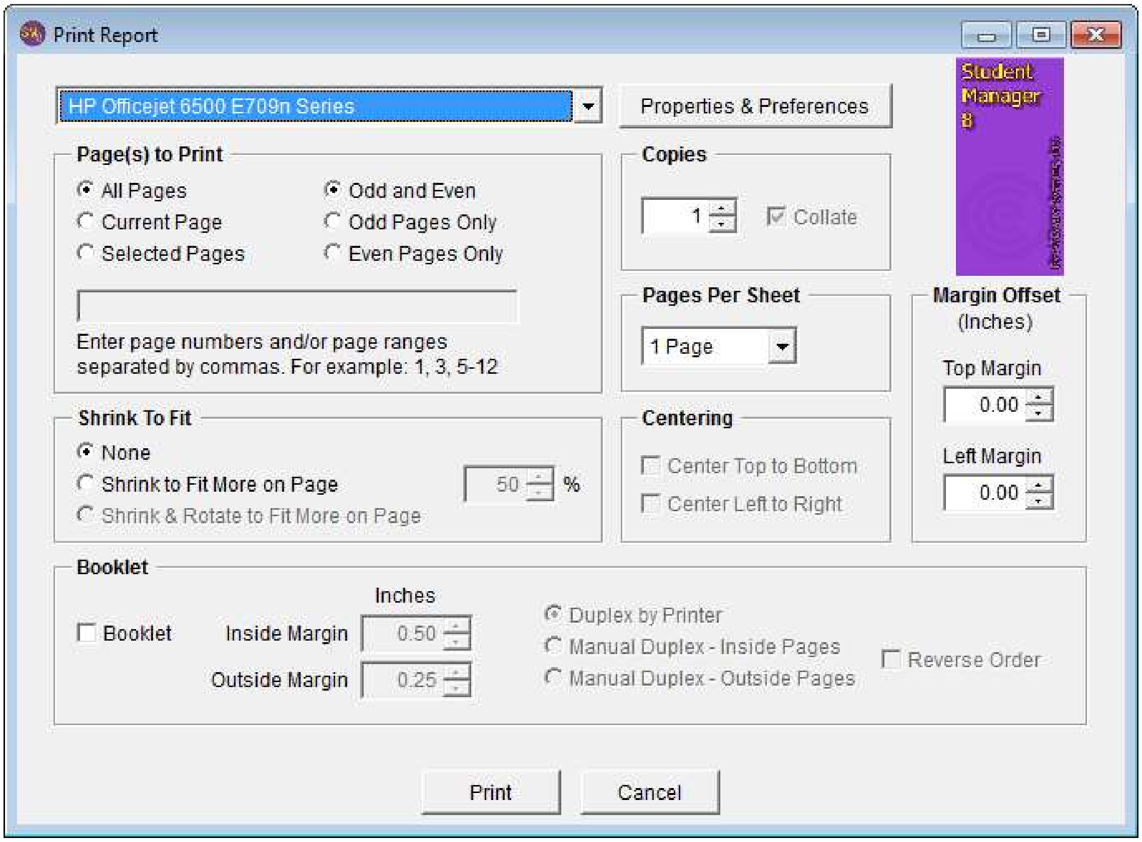
If you selected the *Print to Screen* option on the report area's PRINTING OPTIONS window, after you select/run your query the PRINT PREVIEW window opens.



Use the Print Preview Tool Bar to view pages of the report, zoom in or out, or close the PRINT PREVIEW window.



If you click the **Print** button, the PRINT REPORT window opens:



Appendix A: Student Manager Modules

There are several modules available for Student Manager. Some are basic modules included in all versions of Student Manager. Others are optional modules that are part of the Professional version or that can be purchased separately.

Basic Modules

- **Course** – holds information related to the programs you offer such as department, account number, location, dates, times, fees, instructors, etc. From within this module you can also view student lists, access course registrations, and print quick reports (e.g. rosters, certificates, etc.).
- **Names** – holds information related to the individuals involved in your programs such as name, address, interests, occupation, demographics, etc. From within this module you can also register individuals in courses, keep a contact log, and print quick reports.
- **Registrations** – holds information related to individuals enrolled in your programs such as fees paid, status, grade, contact hours earned, etc. From within this module, you can also cancel and transfer registrations, make payments and print receipts.
- **Payments** – holds information related to payments made to registrations such as payment type (e.g. credit card, check), payment amount, payor information, etc. From within this module, you can also refund payments and transfer payments to other registrations.

  Note: unlike the other modules which can be accessed from the Student Manager Menu (e.g. File | Find | desired module), the Payments module can only be accessed from the **Registration** screen (e.g. you must look up a registration then click the **Payments** button on the **Registration** screen to open the **Payment** screen).
- **Locations** – holds information related to the locations at which your courses are scheduled. Organizations have the option of only entering the building name, or they can use the Split location option (enabled on Course Preferences) to enter the building and room.
- **Firms** – holds information related to the firm at which individuals work such as address, contact person, billing address, etc. Vendor records are also stored in the Firms database (Pocket Ledger users).
- **Instructor** – holds information pertaining to the instructors who teach your courses such as name, SSN, phone number, etc.
- **Holidays** – holds information related to dates courses are not held. Note: holiday dates must be entered into the system BEFORE you schedule courses or they will not be included when the system calculates the room schedule and end dates.
- **Zip Codes** – holds information related to zip codes including zip code, city, county, state, area code and country. Zip codes are used in the Names, Firm, and Faculty Manager (see below) modules.
- **Reporting System** – offers over 250 pre-designed templates for you to view/print the information in your database. Print quick reports from module screens or go to the main reporting menu and print reports for a group of records (e.g. rosters for a series of courses, etc.).

  The reporting system also includes a full-featured report writer that allows you to modify any report template to fit your needs.

Optional Modules

Optional modules that are included in the Executive version of Student Manager are identified with an asterisk (*). The other modules must be purchased separately. For more information about pricing, please contact your ACEware technician.

- **ACEweb Online Registration Module** – allow students to view/enroll in your program offerings via the web. ACEweb reads the data directly from your Student Manager databases, so your course listing is always current. Web registrations are instantly recorded, so you can immediately "see" the registration within Student Manager.
- **Attendance Tracking** – allows you track session attendance.
- ***Budget Builder** - allows you to create course budgets with projected income/expenses. The system will calculate Go/No numbers, Break Even points, and Profit/Loss estimates based on the amounts you entered.
- ***Catalog Builder** - allows you to create course descriptions, assign course descriptions to sections of the course, and view descriptions when registering students. You can also export descriptions to word processing program for catalog publishing.
- ***Company Invoicing** - allows you to produce invoices for current billings and to post payments to those invoices. It is especially useful for organizations that have frequent instances of multiple registrations (for the same person or multiple people) billed to the same agency/firm.
- **Course Packaging** – allows you to bundle courses for discounting purposes.
- ***Customer Relationship Management** - allows you to track all contacts (e.g. phone, personal, mailings and emails) you have with individuals involved in your programs.
- **Electronic Credit Card Processor** - allows you to validate credit card payments within Student Manager and on ACEweb. Note: the Electronic Credit Card Interface module requires a third party software program called PCCharge Pro developed by Go Software, Inc.
- ***Email Module** - allows you to send emails from within Student Manager. You can mass email everyone in your Student Manager database--or--target your email to specific groups. You can also include attachments, email registration receipts/confirmations, send a quick email to an individual or to class registrants, and email rosters to instructors.
- **Extended Credit Module** – allows you to assign multiple credits (ceus, hours, units, etc) to a course. This module is intended for use in situations where multiple professional credits are assigned to a single course, and registrants for a course may want to receive a certain type of credit or multiple credit types.
- ***Faculty Manager** - allows you to track instructors, addresses, pay, and performance. With Faculty Manager, you can match instructor skills to courses, generate contracts, monitor instructor performance, set automatic pay calculation, and generate Instructor Call Back lists.
- ***Pocket Ledger** - allows you to track expenses/income for specific courses and generate profit/loss reports.
- ***Workshop Tracking** - allows you to set up courses/conferences with break out sessions, and register individuals in the sessions.

Appendix B: Glossary of Student Manager Terms

The following is a glossary of Student Manager terms:

Module –the different components of the Student Manager program, e.g. Names module, Course module, etc. There are several modules available for Student Manager. For a complete listing, see Appendix A: Student Manager Modules.

Screen –the form on which you enter data is called a Screen. For instance, the data form on which you enter an individual's personal information is called the **Names** screen.

Field – the data you enter—i.e. First Name, Day Phone, Course Title, etc.—is stored in fields. Fields in Student Manager fall into one of these four data types:

Character: fields that allow entry of letters, numbers and symbols. Names, titles, and codes are examples of Character fields.

Numeric: fields that only allow you to enter numbers. Dollar amounts and number of items are examples of numeric fields.

Date: fields that only allow you to enter dates. These fields always follow the MM/DD/YYYY format.

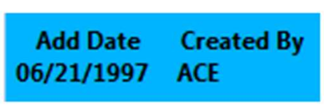
Logical: fields that are either true or false. Check boxes on module screens are examples of logical fields.

In addition to the data types, Student Manager uses three field types:

Editable Fields: fields that contain data which can be edited. These fields appear as white 3-D boxes with a descriptive label to the left of the box telling you what type of data to enter in the field. Examples are first name, course title, start date, etc.

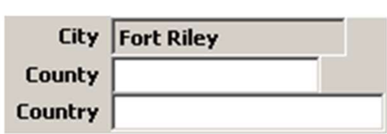
White 3-D boxes in which you enter data

Display Only Fields: fields that are populated by the system and are not editable. These fields are displayed as black text in gray boxes. Examples are Add Date and Update Time fields:



Display only fields show as data only on screens.

Optional Fields: fields that can be disabled if you don't use them. Examples are Name County and Country. If a field is disabled, the white 3-D box does not appear on the screen.



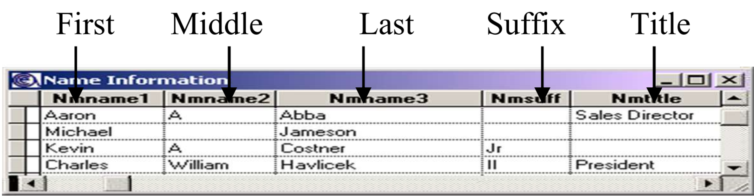
County and Country are enabled—the data entry boxes are visible.

Country is disabled—the data entry box and Label are no longer visible.

Record – a record is made up of all the field data pertaining to one individual, one course, etc. For example, a name record consists of all the data you entered in the various fields about the individual, i.e. first name, last name, address, city, etc.

Table - Tables are made up of columns and rows. Each column corresponds to a field in the table. For example, each field in the Names table has its own column. Each row corresponds to a record. In other words, a row contains all the data about the individual. Each record is different from the other records in the table so you would never have two rows with the same exact information.

Each field in the table has its own column:



Nmname1	Nmname2	Nmname3	Nmsuff	Nmtitle
Aaron	A	Abba		Sales Director
Michael		Jameson		
Kevin	A	Costner	Jr	
Charles	William	Havlicek	II	President

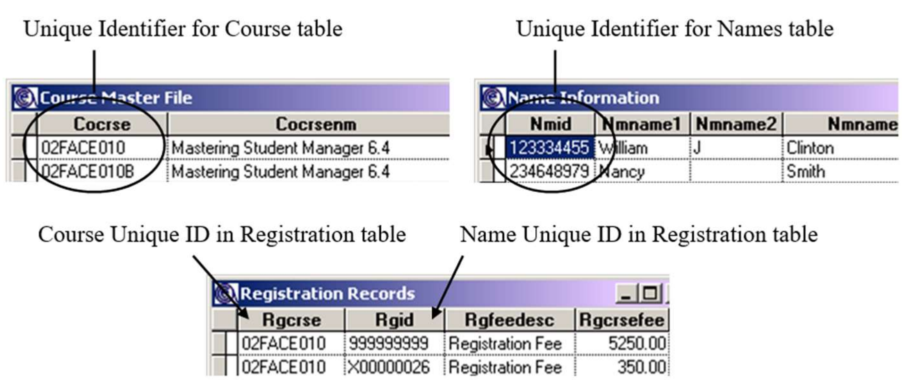
Each row in the table corresponds to one individual's data (fields).

Unique Identifier – each record in a table must have a unique identifier to distinguish it from the other records in the table. Records in the table may have some of the same data but NO two records in the table can have the same identifier. The unique identifier for the Names table is the SSN/ID field. The unique identifier for the Course table is the Course Code.

For instance, you may have two individuals with the same first and last name but each individual record must be given a different SSN/ID. If you try to enter the same SSN/ID on the second record, the system warns you that you already have a record created with that SSN/ID.

Relational Database – a relational database is a collection of tables with relationships between the tables to bring the data together on screens and in reports. These tables are often said to be parents and children of each other. A table is a child of another table if information in the parent table is needed to explain the information in the child table.

For example, in Student Manager the Names and Course tables are parent tables. The Registration table is a child of both Names and Courses. It stores information specific to the registration, i.e. the fee charged, grade assigned, etc. But it does not store information from the Name or Course tables, instead it stores the unique identifiers from the registrant's Name record and the Course record in which the registrant is enrolled.



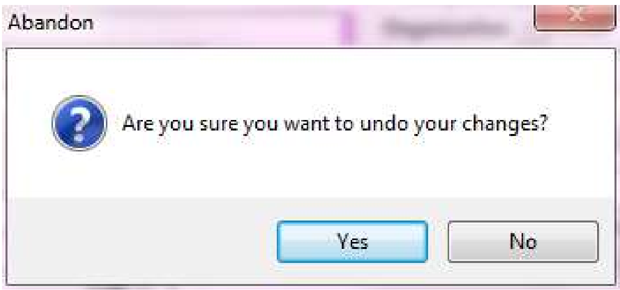
Cocrse	Cocrsenm
02FACE010	Mastering Student Manager 6.4
02FACE010B	Mastering Student Manager 6.4

Nmid	Nmname1	Nmname2	Nmname
123334455	William	J	Clinton
234648979	Nancy		Smith

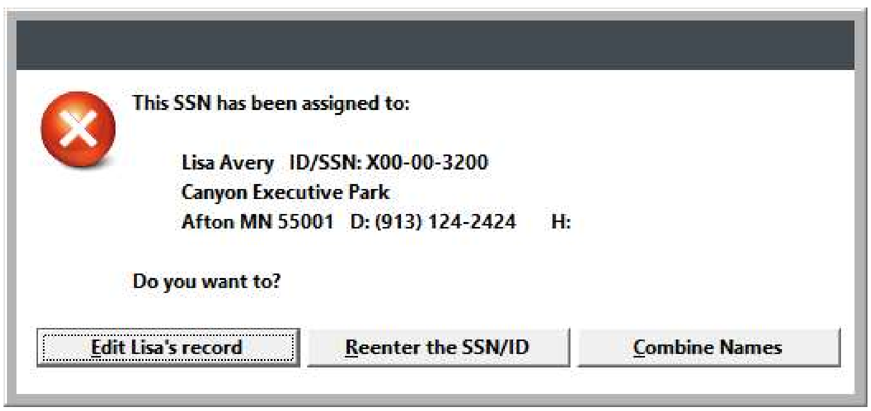
Rgcrse	Rgid	Rgfeedesc	Rgcrsefee
02FACE010	999999999	Registration Fee	5250.00
02FACE010	X00000026	Registration Fee	350.00

What does this mean? It means that you aren't required to re-enter data that is already stored in the Name and Course records such as the registrant's name, title of the course in which he/she is enrolled, etc. The system uses the unique identifiers to retrieve that data from the other tables and display it on the Registration screen and in Registration reports.

Window – these are informational messages which appear when performing certain tasks in Student Manager. Some windows require you to confirm your action by clicking **OK** or **YES** to continue with the task. Other windows give you additional options when performing tasks.



An example of a Student Manager window asking you if you want to abandon the record without saving your changes.



An example providing options from which you choose.

Appendix C: Field Validation in Student Manager

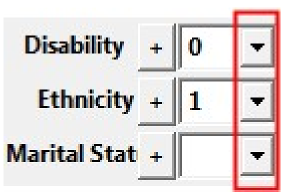
Garbage in - garbage out has become a computer cliché. It refers to collected data that becomes worthless if there is no coordination of how data is entered into the database. To combat this problem, Student Manager uses data validation tools to ensure information conforms with rules set up for specific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

- You can not 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. For example, before you can schedule a course at a particular location, you must first add the location record to the Location table.

  For a complete list of code fields, see Appendix D.

What are validated fields?

Validated fields only allow pre-specified data (called ‘codes’ in Student Manager) to be entered in them. Most of these validated fields have drop down menus from which you select the appropriate code. For example, in this example you can see the down arrow next to the Source, Occupation and Organization fields:



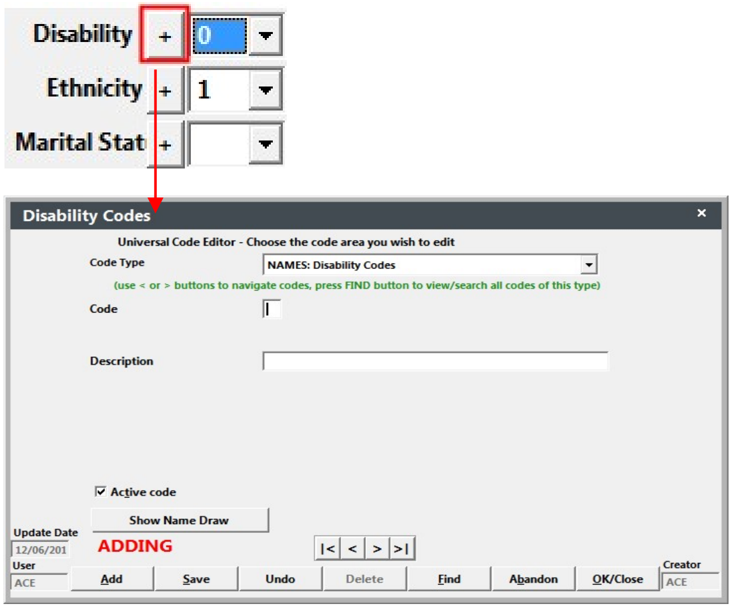
You click on the down arrow to view/select an entry for the field:

Note: the list will also drop down automatically when you tab into the field.

How do you add codes?

If the code you want to enter in the field isn't visible in the drop down list, you can add it in one of two ways:

- Plus Sign Button [+] – you can click the Plus sign button next to the field to open the Code list in 'Adding' mode.

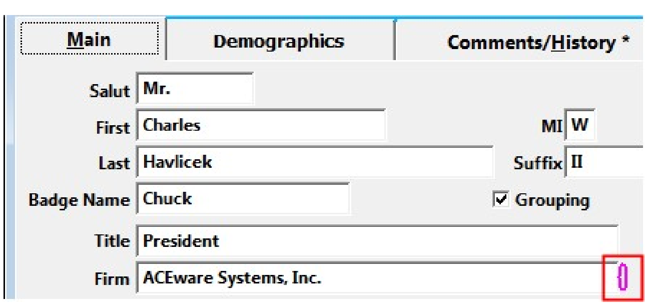


You enter a code and description then click the **OK/Close** button. You'll be returned to the module screen--you can then select the new value from the drop down list.

- **Module | Codes** – select this option from the menu to open the Code Editor screen. You then select the appropriate code list from the *Code Type* drop down.

Other Validated Fields

Some validated fields have purple hash marks to the right of the field. These are codes that serve as links to records stored in secondary tables in Student Manager. The system uses the code to retrieve data from the secondary table for display on the screen and in reports.



You can view all the codes for the specified field with this option, allowing you to make any necessary changes to the codes (i.e. add/edit/delete code entries).

To find a specific code, click the **Find** button.

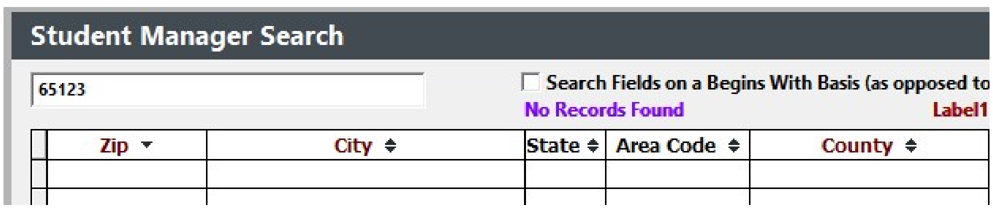
To add a new code, click the **Add** button.

In these fields, you type in the code then tab out of the field. The system will check the appropriate secondary table. If it finds a record that matches your entry, it enters the information in the field(s).

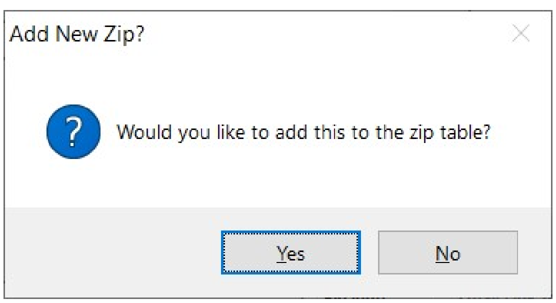
For example, when you enter a Zip Code into a Name record, it accesses the Zip Code table.

If it finds a record with the zip code you entered, it retrieves the City and State from the record and enters it into the appropriate fields in the Name record.

If it can't find a record with that zip code, the Search window opens with possible matches. In this example, none were found.



If you press the **ESC** key, you are given the opportunity to add a new code.



Appendix D: Student Manager Codes

The following is a list of Code fields on each of the Student Manager screens. Unless otherwise stated, these codes are added/edited from **Module | Codes**.

Attendance Screen

- Attendance Codes - attendance code (e.g. arrived late, didn't show, etc.).
- Module Codes - session type (e.g. test, lecture, etc.)

Course Screen

- Course Code - Unique user defined code that identifies course.
- Category - Category for course.
- Type - System generated code identifying the type of course. Course behavior is determined by this code entry (e.g. if type is workshop, the workshop screen is accessible).
- Department - Department that offers the course.
- Subject Code - Subject associated with course. This code will be added to students' Interest code list when they enroll in the course (unless the code has already been assigned to the individual).
- Catalog Code - Course description. Add/edit catalog codes on Catalog screen.
- Account - Account number assigned to course.
- Coordinator - Coordinator assigned to course.
- Location – Building, Room, and Campus where the course is held. Add/edit location on Location screen.
- Grouping Codes - Group to which course belongs--mainly for ACEweb users.

Fees Tab (Course Screen)

- Main Fee Descriptions - Main (Tuition) Fee Descriptions for course.
- Other Fee Descriptions - Optional Fee/Coupon Code Descriptions for course
- Inventory Items - Inventory items for course.
- Membership Code - if using the Membership feature, the code that identifies the membership.

Instructor Tab (Course Screen)

- Pay Type - System generated code to identify what pay type is used to calculate Instructor pay.
- Account - Account number assigned to Instructor pay record.
- Exp Class Code - Expense classification type assigned to Instructor Pay record.
- Type - Instructor type (i.e. Instructor, Keynote Speaker, Presenter, etc.).

Location Screen

- City - validation can be enabled for this field.
- County - validation can be enabled for this field.
- Room Record Internal ID - System generated identification assigned to location record. This code should NOT be edited.
- Location/Room ID # - Internal Room ID that is assigned to the room by your organization. The Location/Room ID number can then be used when running statistical reports.

Names Screen

- ID # - Unique identification code for Name record. This code can be user defined or system generated.
- Salutation - Individual's salutation (e.g. Mr., Ms., etc.). Field Validation for Salutation is optional.
- Zip Code - Individual's zip code. Add/edit zip codes on Zip Code screen.
- County - Individual's county. Field Validation for County is optional.
- Mail Preference - System generated code identifying individual's preferred mailing address.
- Fee Category - Main fee type for which individual qualifies (e.g. Senior Citizen discount).
- Source - Promotional item which generated Name.
- Occupation - Individual's occupation (Clerical, Administrative, Nurse, Plumber, etc.).
- Organization - Individual's organization type (Government, School, Retail, Medical, etc).
- Interest - Subjects in which individual is interested (Computers, Management, etc). An unlimited amount of interest codes can be added to a name record.
- Gender - Individual's gender.
- Education level - Individual's education level.
- Disability - Individual's disability (if any).
- Language - Primary language spoken by individual. This field can be relabeled and used to collect user defined demographic data.
- Ethnicity - Individual's ethnic origin. This field can be relabeled and used to collect user defined demographic data.
- Call Back Users - Student Manager user who should make call back.
- Household Income - Individual's household income level.
- Marital Status - Individual's marital status.
- Family Type - Individual's family type.
- Dwelling Type - Individual's dwelling type.
- Misc Code - field that can be labeled and used to collect data specific to your organization.
- Credential Tab > Testing & Certification Types - credential type.

Firm Screen

- Firm ID - System generated identification number assigned to firm record. This code should NOT be edited.
- Zip Code - Firm's zip code. Add/edit zip codes on Zip Code screen.
- Org Code - Firm's organization type (Government, School, Retail, Medical, etc).
- # of Employees - Firm size code.
- Size (in $000's) - Firm Sales Amount code.
- Firm Type - System generated code identifying Firm type (i.e. firm or vendor).

Registration Screen

- Tracking - Promotional item which generated Registration.
- Status Codes - Status of registrant (e.g. Participant, Speaker, Panelist, No Show, etc.).
- Reg Codes - User defined code with which you can track registrant data specific to your organization (e.g. T-Shirt size, Hotel code, etc.). Organizations can define the label for this field.
- Misc Code - User defined code with which you can track registrant data specific to your organization (e.g. T-Shirt size, Hotel code, etc.). Organizations can define the label for this field (rgmisc field).
- Who Paid - Internal code identifying who paid for registration.
- Fee - Main fee (i.e. fees set up in course record) to be assessed to registrant.
- Additional Charges - Other fees (i.e. fees set up in course record) that can be assessed to registrant.
- Fee Adjustment Description - Fee adjustments that can be assessed to registrant. Field validation for Fee Adjustment Descriptions is optional.

Payment Screen

- Type - System generated code identifying payment type. Organizations can define the label for three of the payment types.
- Add Info - User defined code with which you can track payment data specific to your organization (e.g. Medicare code, Account number, etc.).
- Refund Notes - Refund note entered as Fee adjustment description when refunding money to a registration.

Financial Aid Screen

- Financial Aid Types - type of financial aid.

Catalog Screen

- Code - Unique user defined code that identifies the Catalog record (e.g. COMP1001 for Introduction to Computer course description, E_MAIL for Email template, etc.).
- Kind - System generated code used to identify the Catalog record type.
- Subject - Subject associated with Catalog record.

Faculty Manager Screen

- Faculty System ID # - System generated identification number assigned to faculty record. This code should NOT be edited.
- Zip Code - Faculty member's zip code. Add/edit zip codes on Zip Code screen.
- Source - Promotional item which generated Faculty member.
- Occupation - Faculty member's occupation (Clerical, Administrative, Nurse, Plumber, etc.).
- Organization - Faculty member's organization type (Government, School, Retail, Medical, etc).
- Subject - Subjects which instructor can teach. An unlimited amount of interest codes can be added to a faculty record.
- Call Back User - Student Manager user who should make call back.
- Pay Type - System generated code identifying pay types that can be used to calculate Instructor Pay record.

Pocket Ledger Screen

- Expense Classification - Expense classification type assigned to Pocket Ledger record.
- Major Expense Category - Major category for Expense Classification code.
- Account - Account number assigned to Pocket Ledger record.
- Vendor - Vendor who provided item. Vendor records are stored in the Firm table.

Appendix E: Student Manager Shortcut Keys

Activate Main Menu Items

Alt+F = Activates File Menu
Alt+E = Activates Edit Menu
Alt+M = Activates Module Menu
Alt+R = Activates Reports Menu
Alt+T = Activates Tools Menu
Alt+H = Activates Help Menu
Alt+G = Activates Module > Registrations Menu
Alt+P = Activates Module > Pocket Ledger Menu
Alt+S = Activates Reports > Statistics Menu

Student Manager Actions

F1 = Show List of Student Manager shortcut keys
Ctrl+U = Shows who is logged into Student Manager (Tools > Show Users)
Ctrl+B = Checks for Student Call Backs (Tools > List Student Callbacks)
Alt+K = Checks for Instructor Call Backs (Tools > List Instructor Callbacks)
Ctrl+E = Opens System Information window (Help| About Student Manager)
Alt+Q = Exits Student Manager (File > Quit)
Alt+1 = Opens course Mass Change/Update/Delete/Archive screen.

Module Shortcuts

Alt+C = Opens new Course record (Module > Courses > Add Course)
Alt+J = Opens Find Course window (Module > Courses > Find Course)
Ctrl+K = Opens Find Active Course window (Module > Courses > Find Active Course)
Alt+A = Opens new Name record (Module > Names > Add New Name)
Alt+L = Opens Find Names window (Module > Names > Lookup Name)
Ctrl+F = Opens Find Firm window (Module > Firms > Find Firm)
Alt+I = Opens new Faculty Manager record (Module > Faculty > Add Instructor)
Ctrl+I = Opens Faculty Manager Find window (Module > Faculty > Find Instructor)
Alt+Z = Speed Registration Entry routine (Module > Registrations > Speed Registration Entry)
Alt+O = Opens Find Outstanding Invoices window (Module > Invoices > Outstanding Invoices)

Course Record Shortcuts

Alt+3 = Copies code, title, dates, instructor(s) names, time, description, location, and main registration fee from the open Course record to the Clipboard.

Ctrl+T = Copies all of the email addresses of students in the course, separated by semicolon, onto your clipboard.

Faculty Record Shortcuts

Alt+3 = Copies name, title, firm, address, day phone, and email address (in block format) from the open Faculty record to the Clipboard (for recalling into a document, e.g. letter, email, etc.)

F3 = Faculty Talent Search

Name Record Shortcuts

F5 = Find Names Tool

Alt +0 (Zero) = Manually edit the City and State

Alt+3 = Copies name, title, firm, address, day phone, and email address (in block format) from the open Name record to the Clipboard (for recalling into a document, e.g. letter, email, etc.)

Alt+F9 = Shows payment history of individual (can also be ran from Registration screen)

Alt+F12 = Opens Log CRM Entry screen

Alt +W = clones current Name record (Edit > Clone Name)

Alt+V = pastes data from cloned record into open Name record (Edit > Paste Name)

Alt+Y = create an Instructor record from the open Name record

Shift+F5 = Opens Blacklist

Shift+Alt+P = ACEweb Users Only: blanks the Password field

Firm Record Shortcuts

Alt+3 = Copies firm name, contact, address, and phone (in block format) from the open Firm record to the Clipboard (for recalling into a document, e.g. letter, email, etc.)

Registration Record Shortcuts

F4 = Find Registrations Tool

F8 = Mass Group Registrations

Alt+4 = Switches between open and validated Fee Adjustment Descriptions

Alt+F9 = Shows payment history of individual (can also be ran from Names screen)

Ctrl+F12 = Registration Import Wizard

Screen Shortcuts

Tab = Move FORWARD through fields

Shift +Tab = Move BACKWARD through fields

Esc = Escape screen WITHOUT saving changes; escape Find window WITHOUT selecting record

Ctrl+A = Selects all data in a field

Ctrl+Z = Undo

Ctrl+X = Cut

Ctrl+C = Copy

Ctrl+V = Paste

Ctrl+Y = Deletes characters from where the cursor is to the end of the field

Ctrl+Left Arrow Key = Moves the cursor to the front of next word in a field
Ctrl+Right Arrow Key = Moves the cursor to the front of the previous word in a field
Home = Moves to the beginning of a field
End = Moves to the end of a field
F4 = Opens drop down list

Open Report Shortcuts

Ctrl+M = Mailing Labels (Reports > Demographics > Mailing Labels)
Ctrl+P = Names w/codes (Reports > Demographics > Names w/code)
Alt+D = Deadbeat (Reports > Accounting > Special 1 Reg/1 Line [Deadbeat])
Ctrl+R = Name Roster (Reports > Registrations > Rosters > Name Roster)
F2 = Quick Count Enrollment Report
Ctrl+F2 = Quick Room Use Report
Ctrl+F3 = Course Packaging Report Area
F7 = Pay Grabber Report
F9 = Student Manager Dashboard
F10 = Membership Retention Wizard
F11 = Attendance Tracker
F12 = Financial Aid Reporter

Report Designer Shortcuts

Ctrl+I = Preview Report
Ctrl+F4 = Close the Modify Report screen

Special Action Shortcuts

Alt+F1 = Repeats last Course Code entered in Query, last course record edited, or last registration added
Alt+F2 = Repeats last text value entered into a query field
Shift+F2 = Stamps current date into a date field
Alt +F3 = Recalls user message/data into field (enter message on Edit > My User Profile screen)
Alt+F4 = Recalls user message/data into field (enter message on Edit > My User Profile screen)
Alt+F5 = Recalls user message/data into field (enter message on Edit > My User Profile screen)
F6 = Resets system to recover from error. NOTE: any unsaved changes will be lost

Appendix F: Student Manager Menu Map

Access the following from the Main Menu:

If there is a Keyboard Shortcut, it is listed next to the menu name.

File Menu

- New >
  - Names
  - Course
  - Registration
  - Firm
  - Zip Code
  - Location
  - Holiday
  - Ledger Entry
  - Instructor
  - Catalog Entry >
    - Catalog Code
    - Memo Text
    - E-Mail Template
    - Credit Type
  - Lesson

- Find >
  - Names
  - Course
  - Registration
  - Firm
  - Zip Code
  - Location
  - Holiday
  - Ledger Entry
  - Instructor
  - Catalog Entry >
    - Catalog Code
    - Memo Text
    - E-Mail Template
    - Credit Type
  - Lesson

- Save and Close
- Save
- Exit - Alt+Q

Edit Menu

- Undo - Ctrl+Z
- Cut - Ctrl+X
- Copy - Ctrl+C
- Paste - Ctrl+V
- Clone Name - Alt+W
- Paste Name - Alt+V
- Preferences
- My User Profile

Help Menu

- Help
- Technical Support
- Student Manager Resources
- Create HTML Formattaed Emails
- Keyboard Shortcuts – F1
- Newsletter Archive/Signup
- Webinar Archive
- SM Updates Forum
- About Student Manager – Ctrl+E
- Check for Newer Version

Module Menu

Names >
- Add New Name - Alt+A
- Lookup Active Name - Alt+L
- Lookup Name
- Deactivate Names
- Mass Delete/Purge
- Reset Name Quick Report Defaults
- Blacklist
- Person Locator - F5

Courses >
- Add Course - Alt+C
- Find Course - Alt+J
- Find Active Course - Ctrl+K
- Duplicate (Clone) a course
- Mass Change/Update/Delete/Archive
- Mass Delete
- Cancel Course
- Mass Registration Transfer (Crs -> Crs)
- Mass Clone
- Enrollment Report - F2
- Room Use Reporting - Ctrl+F2
- Clone Room

Registrations >
- Add/Edit Registrations (by Registrant)
- Add/Edit Registration (by Course)
- Speed Registration Entry - Alt+Z
- Reset Print Receipt Defaults
- Pay Grabber - F7
- Mass Group Registrations - F8
- Find Registrations - F4

Codes (no other menu items)

Firms >
- Add Firm
- Find Firm - Ctrl+F
- Add Vendor
- Find Vendor

Zip Codes >
- Add Zip Code
- Find Zip Code

Locations >
- Add Location
- Find Location
- Define Location Splits

Holidays >
- Add Holiday
- Find Holiday
- Clear old Holidays
- Generate Federal Holidays

Pocket Ledger >
- Ledger Entries – Single Cost Center
- Ledger Entries – All ledger entries
- Ledger Entries – Mass Entry
- Cost Center Codes

Faculty >
- Add Instructor - Alt+I
- Find Instructor - Ctrl+I
- Find Active Instructor
- Mass Update Faculty Fields
- Instructor Locator - F3

Catalog >
- Catalog Codes
- Course Proposals
- Memo Text
- E-Mail Templates
- Credit Types
- Marketing Campaigns
- SMS Templates

Invoices >
- Outstanding Invoices (All) - Alt+O
- Outstanding Invoices (by date range)
- All Invoices
- Pay Multiple Outstanding

Lessons - Independent Study Module >
- Add/Edit Lessons - Alt+F8
- Process Lessons - Barcode - Ctrl+F8

Reports Menu

Accounting >
- Cashbox
- Daily Income X Source by date
- Daily Income X Source by course
- Enrollment & Income Summary
- Income Detail by Registrant
- Special 1 Reg/1 Line - Alt+D

Demographics >
- Names (w/ codes) – Ctrl+P
- Names (w/registrations)
- CRM Info
- Mailing Labels – Ctrl+M
- Firms (w/employees)
- Firms (w/o names)
- Firms (w/registrations)

Courses >
- CEU Reporting
- Course Details (w/fees)
- Room Use List >
  - Date Sort
  - Location Sort
- Waitlists
- Income Summary
- Generate Catalog Copy
- Attendance
- Course Packaging – Ctrl+F3

Registrations >
- Registrations (w/fees & payments)
- Counts of optional fees
- Receipts
- Rosters >
  - Name Roster – Ctrl+R
  - Attendance Roster
- Transcripts
- Nametags
- Certificates
- Tabletents

Faculty >
- Contract Ageements
- Instructor Lst
- 1099 For
- Performance Data
- Check Request
- Faculty Only Reports
- Faculty CRM

Invoices >
- Run Invoices
- Run Aging Report

Pocket Ledger >
- Expense Listing >
  - Cost Center Grouping
  - Expense Class Grouping
  - Account Number Grouping
  - Vendor Grouping
- Income/Expense Balances >
  - Detail
  - Summary
  - Snapshot – Alt+Equals (=)

Workshops >
- Rosters/Certificates
- Enrollment Summary

Statistics >
- Names >
  - Demographic Summary
  - Performance Sorting
- Distribution of Participants
- Firms Represented
- Tracking Codes
- Course >
  - Course Data Summary
  - Performance Review

Codes >
- Course Category
- Course Grouping Codes
- Course Subject/Interest Codes
- Catalog Codes
- Occupational Codes
- Organizational Codes
- List Source/Tracking Codes
- Account Codes
- Registrant Status
- Ledger Expense Codes
- Coordinator Names
- Registration Fees
- Demographic Codes
- Department Codes
- Additional ID Codes
- Inventory Items

Reports Menu (continued)

Dashboard -F9

Membership

Financial Aid -F12

Favorites -Ctrl+F1

Global Favorites

Report Design Wizard

Search Reports for Keyword

Appendix G: Report Area Guide

The following tables list the reporting area, the databases the report area accesses, and the Query Fields List designation.

ACCOUNTING

REPORT	DATABASES
Cash Drawer ➢ Receipt Listing ➢ Refund Listing ➢ Cash Box Reconciliation	Names, Course, Crseudfs, Pay
Daily Income by Source (by Date)	Register, Pay, Course, Names
Daily Income By Source (by Course)	Register, Pay, Course, Names
Enrollment & Income	Course, Grouping
Income Detail By Registrant	Register, Course, Names, Pay
Special 1 Reg/1 Line	Names, Register, Course, Location

DEMOGRAPHICS

REPORT	DATABASES
Names (with Codes)	Names, Firms, Nameudfs, Namecode
Names (with Registrations)	Course, Register, Names, Nameudfs
CRM Info	CRM, Names
Mailing Labels	Names, Firm, Nameudfs, Register, Testing
Firms (w/ Employees)	Namecode, Nameudfs, Names, Firms
Firms (w/o Names)	Firm
Firms (w/ Registrations)	Course, Register, Firms, Names, Regfees

COURSES

REPORT	DATABASES
CEU Reporting	Course, Crseudfs, Location
Course Details (w/ Fees)	Course, Location, Grouping, Fees, Crseudfs
Room Use ➢ Date Sort ➢ Location Sort	Course, Location, Crsroom
Waitlists	Register, Names, Course
Income Summary	Course, Grouping, Crseudfs, Location, Linkinst, Instruct, Fees
Generate Catalog Copy	Catalog, Course, Location, Crseudfs, Instruct
Attendance	Attend, Course, Names, Register
Course Packaging	Course, Crsepack, Names, Register, Regudfs, Pay

INVOICES

REPORT	DATABASES
Run Invoices	Names, Course, Pay
Run Aging Report	Names, Course, Pay

REGISTRATIONS

REPORT	DATABASES
Registrations (w/Fees & Payments)	Register, Course, Pay, Names, Regudfs
Counts of Optional Fees	Register, Regfees, Names, Course
Receipts	Firm, Names, Course, Register, Pay, Regfees, Location
Rosters ➢ Name Roster ➢ Attendance Roster	Names, Namudfs, Firm, Register, Course, Regfees, Location, Regudfs, Pay
Transcripts	Names, Register, Course
Name Tags	Names, Nameudfs, Register, Course
Certificates	Names, Register, Course, Location
Tabletents	Names, Nameudfs, Register, Course

FACULTY REPORTS

REPORT	DATABASES
Contract Agreements	Instruct, Course, Linkinst, Firm, Location
Instructor List	Instruct, Course, Linkinst, Firm, Location
1099 Form	Instruct, Course, Linkinst, Firm, Location
Performance Data	Instruct, Course, Linkinst, Firm, Location
Check Request	Instruct, Course, Linkinst, Firm, Location
Faculty Only Reports	Instruct, Course, Linkinst, Firm, Location
Faculty CRM	Instruct, Course, CRM, Firm, Linkinst, Namecode

POCKET LEDGER REPORTS

REPORT	DATABASES
Expense Listing ➢ Cost Center Grouping ➢ Expense Class Grouping ➢ Account # Grouping ➢ Vendor Grouping	Ledgentr, Leddesc, Firm
Income/Expense Balances ➢ Detail ➢ Summary	Ledgentr, Leddesc, Firm
Budget Reports	Ledgentr, Leddesc, Firm

WORKSHOP REPORTS

REPORT	DATABASES
Rosters/Certificates	Wkshpmst, Courses, Names, Register, Wkshpind
Enrollment Summary	Wkshpmst, Courses

STATISTICAL REPORTS

REPORT	DATABASES
Names Demographic Sorting	Courses, Names, Register, Namecode, Nameudfs
Names Performance Sorting	Courses, Names, Register, Namecode, Nameudfs
Distribution of Participants	Firm, Register
Firms Represented	Firm, Register
Tracking Codes	Names, Register
Course Data Summary	Courses
Course Performance Review	Courses

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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