

ACEware Systems, Inc.

**Student Manager
SOP Template**



Revised August 2023

Welcome!

The Student Manager SOP Template is intended as a basic outline for your organization to complete and expand as needed, keeping in mind that these procedures will evolve with time and will therefore need periodic review and revision.

The manual is not intended to take the place of the online help guide, or your tech. And, since no two organizations are the same, it is understood that the template will not cover every unique use of Student Manager. That said, we encourage you to customize the template, scratching out things that don't/won't represent your staff's methods, and adding details that reflect *your* way of getting the job done.

Most SOP manuals provide intricate step-by-step instructions for completing specific tasks. ACEware has an extensive library of online help topics that does just that. This manual will record preferences and settings, roles and responsibilities, and periodic tasks. Think of this as the set of instructions that you would leave on your desk for your successor, or, alternately, the manual you wish you had received on the first day of your job.

As always, we welcome discussion, suggestions, and changes.

A few words about using this template

Throughout the manual there are screen shots, mostly of preference screens. These should be replaced with screen shots of your preference screens.

The template was created using Microsoft Word 2010. Subject headers are defined as Header 2. If you continue this practice the Table of Contents can be updated automatically by going to the References ribbon, Table of Contents, Update Table. This will allow you to add new sections, delete pages, and update page numbers.

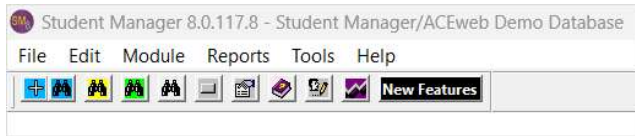


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General Information

The Student Manager version number is listed in the upper left corner of the screen.



F6 resets system to recover from many errors. NOTE: any unsaved changes will be lost.

F2 is the **Quick Count** Enrollment Report

The screenshot shows the "QUICK LIST - Enrollment Report (F2)" dialog box. It has a purple background and contains various filter options. At the top, there are radio buttons for "Send output to:" (screen, print, Excel). Below that are checkboxes for "Abbreviate Display" and "Order output by:" (Begin Date). There are four radio buttons for "View X days out:" (1, 2, 3, 4). Below these are four radio buttons for "View X days out:" (View courses where, View All (No date range), View Room Use Date where). There are also radio buttons for "List:" (All, Only Non-Cancelled, Only Cancelled) and "Courses:" (Only show courses with NO instructor, Display count of paying (non-comp) Registrants). A text field for "That also match (enter a value if desired) for" is present. Below this are several dropdown menus for Course Number, Course Category, Course Type, Course Account #, Course Subject Code, Grouping Code, Course Coordinator, Course Department, Course Title contains..., Course runs on DOW (Sun, Mon, Tue, Wed, Thu, Fri, Sat), Course Location, Instructor Last Name begins with, and Catalog Code exactly matches. There is a text field for "That match custom condition..." and a checkbox for "Only show my custom conditions". At the bottom, there are buttons for "OK", "Cancel", "Set Filter", "Clr Filter", and "Email Reminders".

F7 is the **Pay Grabber Report** that may help solve payment issues.

The screenshot shows the "PAY GRABBER- Payment Lookup (F7)" dialog box. It has a green background and contains various filter options. At the top, there are radio buttons for "Output to:" (screen, print, Excel) and a dropdown for "Order by:" (Student). Below that are checkboxes for "Show me:" (include deleted payments, only deleted payments, Payments flagged as AW-PENDING, Auto clear AW-PENDINGs w/ no bal). There are checkboxes for "Skip Voids" and "Skip Billings". Below these are radio buttons for "...and the:" (Add Date, Update Date). There are two text fields for "is between" (MM/DD and / /). Below these are several text fields for "and the Payer Name Contains", "and the payment type was", "and the Receipt # =", "and the web Pay Transaction ID", "and Payment Auth Number=", "and Payment Number Contains", "and the Pay amount is between" (0.00 and 0.00), "and was entered by", and "and the Paid to Invoice # =". There is a text field for "that matches custom condition..." and a checkbox for "Only show my custom conditions". At the bottom, there are buttons for "OK" and "Cancel".

Alt + 9 provides a listing of all payments for a specific user. This option is only available while on a name or registration screen.

Record	Date	Course	Payer	Pay	Paytype	Receipt	Paytoinv	Amount	Paydetail
000000000334	12/30/22	23SACE010C	History: Charles Havlicek	2	Check	C0000258		295.00	987987
000000000335	01/03/23	23SACE101A	Sharon Brookshire	1	Cash	C0000261		230.00	
000000000337	01/03/23	23SAPPDEVA	Sharon Brookshire	2	Check	C0000262		1000.00	34567
000000000339	01/03/23	23SACE102A	Sharon Brookshire	2	Check	C0000263		100.00	9877
000000000179	06/12/23	23FACE102A	ACEware Systems, Inc.	2	Check	C0000230		125.00	98797
000000000180	06/12/23	23FACE101A	ACEware Systems, Inc.	3	Billing			230.00	3456782
000000000181	06/12/23	23FACE010A	Charles Havlicek	2	Check	C0000231		295.00	
	//								
	//		Entries = 7				Paid = \$	2045.00	Billed = 230.00

Online help is available at: <https://www.aceware.com/SMHelp/>

Recordings of training webinars are available at: <https://www.aceware.com/webinars/>

User Accounts

ACEware suggests that every organization have a minimum of one admin user as specified on the Password Maintenance screen under groups. (Password maintenance is located on the Tools menu). Admin Student Manager users are:

Other groups with predefined roles include:

NOTE: Power level details are available by clicking the question mark to the right of each category.

Names	_____	Instructor Pay	_____
Registrations	_____	Instructor	_____
Pay	_____	Pocket Ledger	_____
Course	_____	Report System	_____
ACEweb	_____	Email System	_____
Codes	_____	Financial Reports	_____

Names	_____	Instructor Pay	_____
Registrations	_____	Instructor	_____
Pay	_____	Pocket Ledger	_____
Course	_____	Report System	_____
ACEweb	_____	Email System	_____
Codes	_____	Financial Reports	_____

Names	_____	Instructor Pay	_____
Registrations	_____	Instructor	_____
Pay	_____	Pocket Ledger	_____
Course	_____	Report System	_____
ACEweb	_____	Email System	_____
Codes	_____	Financial Reports	_____

Additionally, users may have customized roles to meet specific requirements.

Names

The Student Manager name screen can be customized via the Preferences Screen. A screen shot of our current Names preference screen is below:

The screenshot shows the 'Preferences' window with the 'Names' tab selected. The window is divided into several sections:

- Enable Fields:** A grid of checkboxes for various fields. Checked fields include: 2nd Address line, Badge Name, Birthday, Callback Date Field, Report on Startup, Cell Phone, County, Day Phone, Disability, Don't Mail Field, Education Level, Email Address, Outstanding, Ethnic Origin, Family Type, Fax Phone, Fee Category, Firm/Organization, Save as home addr, Gender, Homeowner, Household Income, Language, Mail Stop Field, Marital Status, Member Number, Miscellaneous Code, Name Char 1, Night Phone, NMCODE1, NMCODE2, Occupational Code, Organizational Code, and Preferred MoC.
- System Behavior Preferences:** Includes options like 'Validate Label Info', 'Display Deadbeat Info', 'Set Mail address Preference', 'Use Province', 'Hide History for name level less than', 'Enable Name Grouping', 'Drop Down list on empty field', 'Senior Fee Category', 'Age' (set to 62), 'R', 'First Name Match (in Add Mode)' (set to 3), 'Go back' (set to 12 days), 'Default sort for Names Screen' (set to Last Name/F), 'Warn if ID# Not Entered', 'Warn when entering duplicate email address', 'Warn when entering duplicate Member #', 'Warn when entering duplicate Code Field 2', 'Disable Area Code Fill-in', 'Special Needs Popup', 'Default Interest Code Identifier', and 'Label for Credential Tab' (set to Credential).
- Legend:** Blue - Global, Black - User, Purple - User, Only Admin Can Change.
- Buttons:** OK/Close, Abandon, Name UDFs.

Social Security Numbers:

We do ___ do not ___ store social security numbers in the ID# field. *This practice is not recommended by ACEware*

We do ___ do not ___ store social security numbers in the nmcode2 field. If social security numbers are stored in the nmcode2 field they are ___ are not ___ encrypted.

Name grouping ___ Yes, we group members of the same family
 ___ No, we mark members of the same family "do not mail" but do not group

NOTE: If multiple emails are stored in the email field on the name screen, the first email is used as the login for ACEweb

Mandatory Fields on the name record include: _____

Courses

The Student Manager course screen can be customized via the Preferences Screen. A screen shot of our course preferences screen is below:

Preferences

System | **Names** | **Course** | **Register** | **Org Defaults** | **Pocket Ledger** | **Firm** | **Faculty** | **Pay**

Enable Fields

- Account #
- CEUs
Label As: CEUs
- Cochar1
Label As: Cochar1
- Coordinator
Label As: Coordinator
- Credits
Label As: Credits
- Date Reminder
- Department
- Estimate
- Group Count
- Grouping Codes
Label As: Hours
- Hours
- Location
- Subject Code

Display Due & Paid totals

Split Location Field

Enable display of ACEweb options
Default value for ACEweb Lag Days: 60

Use Location Campus Field

Validate Location City

Validate Location County

Course Time: _____

Pattern: _____

Recalculate Enrollment on Course Load

Auto Expire Early Bird Fees

Use Number of Days for Fee Expires (Early Bird)

Memberships Expire on a:

Specific Date Certain # of Days

Off Fee by Fee basis

Apply Membership Fee If Course Begins Before Expiration

System Behavior Preferences

Open ▾ Default Course Type

- Enable Room Conflict Checking
 - Also Conflict Check Rooms on Asynch Courses
 - Keep Room records when cancel Courses
- Automatically populate Course Alias field
- Use Time Only in Course Meeting Time
- Lock Time Warn on time/loc. change
- Abbreviate Course Time
- Clone User Defined Fields (Cloning)
- Set ACTIVE field Default to True
- Drop Down list on empty field
- Subject Scoping (Viewing instructors)
- Clone Reg Warning Message (Cloning)

Unit for Independent Study Expiration Date: Weeks Months

- Use Test Request Date (wiTestReq)
- Use Proctor in Name Screen
- Use SSN as primary lookup key (Lessons)
- Enable barcodes for lesson editing
- Automatically track attendance
- Send Reminders # of Days before Beg Date: 60
- Report People Not Emailed on Reminders
- Send Follow-ups # of Days after End Date: 2
- Report People Not Emailed on Follow-ups
- Allow Asterisks & Colons in Course Code
- Fill in Course Min with Go/No Go value

Default Web Publish: Do NOT Publish ▾

Prevent Room Use creation on Asynch Courses

Filter

Blue - Global Black - User
Purple - User, Only Admin Can Change

OK/Close Abandon Course UDFs

The characters in our course numbers have significance. For example:

23W101COMPA

Character 1 & 2 – The academic year of the course

Character 3 – Term

Characters 4, 5 & 6 – The class number

Characters 7, 8, 9 & 10 – Type of class and/or area

Character 11 – Indicates the first time offered this term

Canceling a course

Before canceling a course, remove all registrations and payments

Waitlisting

A waitlist is a list of students waiting for open seats in a full course. You can add students to a waitlist when the course is full then move them from the waitlist to enrolled status if a seat becomes available.

When a student is waitlisted:

- The *Waitlisted* box is checked on their registration record.
- While the appropriate Main fee is selected and any Mandatory fees added, they are not actually assessed and the Total Due is 0.00.

Waitlist policy:

- We do not allow waitlisting for any course
- We allow waitlisting for some courses
- We allow students to waitlist for any full course

We use do not use Budget Builder to build a budget for each class

We use do not use Pocket Ledger to track expenses

The following users have access to Budget Builder and Pocket Ledger:

We build a budget in Student manager for:

- All courses
- Some courses
- No budgets are kept in Student Manager

Registrations

The Student Manager registration screen can be customized via the Preferences Screen. A screen shot of our registration preferences is below:

The screenshot shows the 'Preferences' window with the 'Register' tab selected. The window is divided into several sections:

- Enable Fields:**
 - Confirm Date (Label Field as: Confirmed) Use in Registrar Mode
 - Date Completed Field Use in Registrar Mode
 - Date Expires Field Use in Registrar Mode
 - Grade Field (Default Grade Value: 5) Use in Registrar Mode
 - Misc Field (Label Field as: Misc Code) Validate? Use in Registrar Mode
 - Print Cert Date (Label Field as: Cert Date) Use in Registrar Mode
 - Publish Name (in ACEweb) Use in Registrar Mode
 - Reg Code (Label Field as: T-Shirt) Use in Registrar Mode
 - Status (Default Value:) Use in Registrar Mode
 - Tracking Code (Default to Name Source) Use in Registrar Mode
- System Behavior Preferences:**
 - Sort tracking code by description
 - Validate Reg Adjustment Fee Descriptions
 - Delete Attendance Records when Canceling
 - Use Bill/Pay Reg Type
 - Use decimals in fees display
 - Warn when Registering Old Course
 - Quick Cancel Registration
 - Show groupings for the last days: 30
 - EdToGo/ProTrain Fee Defaults:
 - Retail
 - Net
 - Couple Fee Keyword: Couple
 - Check whether student has met prerequisites
 - Lock Edit of Registration Fee
 - Enable Group X Firm Receipt
 - Roll workshop CEU's to Reg CEU's
 - Prompt for Grouping
 - Allow Transfer of Option Fees
 - Add all lessons to registration at enrollment?
 - Disable lesson edit for expired registrations
 - Ignore expiration date when using barcodes
 - Allow edit of fee amount on registration
 - Allow edit of registration add date
 - Drop Down list on empty field
 - Find Sort by Last Name (from Course)
 - Put Grade from Parent Courses on Children
 - Use Additional Fee Quantity Package Registration Fee
 - Add Mandatory Fees to Child Courses
 - Disallow reg fee delete to staff with lower reg levels
 - Allow Waitlisted to be Grouped
 - Use Additional Workshop Fields
 - Disallow reg in same class (even different semester)

Legend: Blue - Global, Black - User, Purple - User, Only Admin Can Change. Buttons: OK/Close, Abandon, Register UDFs, Use UDFs in Registrar Mode.

Payment is _____ is not _____ required for a registration to be considered complete

The standard confirmation is emailed _____ and/or mailed _____

Our standard receipt is the default receipt _____ or an additional report called _____

Our email receipt is the default _____ or a user defined email receipt called _____

We do _____ do not _____ group registrations. If registrations are grouped it is when _____

Marketing

Course descriptions are maintained under Module / Catalog / Catalog codes.

To export catalog information for use in MS Word:

- 1) Select Reports >> Courses >> Generate Catalog Copy.
- 2) Follow the exporting routine to export your catalog information.

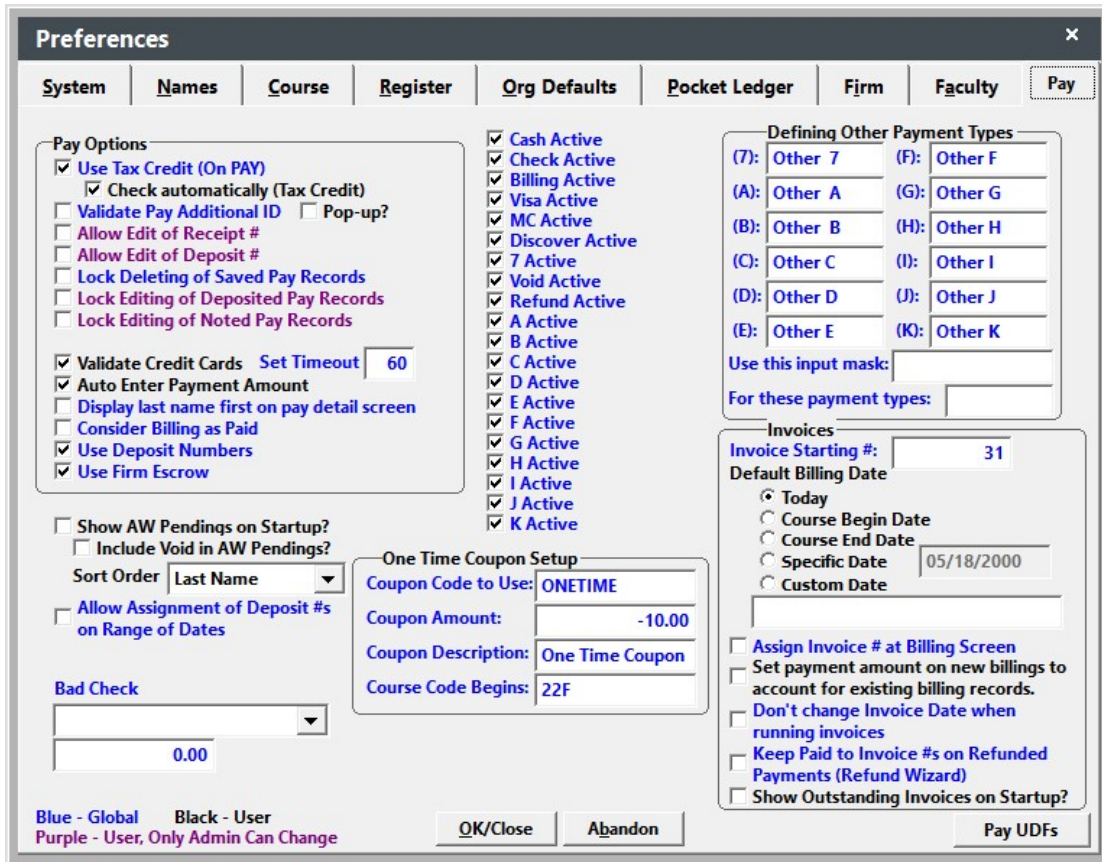
Additional help is available in the Student Manager online [help guide](#).

The Source/Tracking codes are used to track the promotion that generated the name or registration. From Module / Codes / Register: Tracking Codes you can obtain a count of names and registrations obtained as a result of this effort. Deactivate expired tracking codes at the end of each term.

Diligence regarding subject code on the course screen and interest codes on the name screen is mandatory. Student interest codes are automatically updated by the subject code on a course. When a student registers for a class, the subject code is automatically stamped in their list of interests. Like the source code, subject and interest codes can be tracked from Module / Codes / Names: Interest Codes. This is a shared list of codes, ie the list of subject codes and interest codes are identical.

Invoicing

Invoice preferences are on the pay tab of preferences. A screen shot of our pay preferences is below:



We are ___ are not ___ using the nine additional pay types

Our default billing date is set to: _____

We do ___ do not ___ allow assignment of an invoice number at the billing screen

We do ___ do not ___ allow editing of receipt numbers

We do ___ do not ___ consider billing as paid

Invoices are run: *(daily, weekly, twice monthly etc.)* _____
and are run by _____

_____ is responsible for tracking outstanding invoices.

Reporting

Hint: Looking for a report? Search existing reports for a keyword or field by using Tools / Reports / Search Reports for Keyword

Hint #2: You can print a listing of all the reports in your system from the Deadbeat Report area (Alt + D)

The following reports are used for daily, term/quarter and annual reporting:

NOTE: The following users are responsible for modifying reports: _____

Reports Run Daily

Report Area	Report Name	Query
_____	_____	_____
_____	_____	_____
_____	_____	_____

Reports Run at the End of Term or Quarter

Report Area	Report Name	Query
_____	_____	_____
_____	_____	_____
_____	_____	_____

Reports Run Annually

Report Area	Report Name	Query
_____	_____	_____
_____	_____	_____
_____	_____	_____

Preparing to run a class

The following documents/reports are needed to prepare the class folder.

- | | |
|-------------------------|--|
| 1. Class Description | Quick Reports Default Report (Course Information Detail) |
| 2. Instructor agreement | Faculty Contract Course Quick Reports / Default Report |
| 3. Name Roster | Course Quick Reports / Default Report |
| 4. Attendance Roster | Course Quick Reports / Default Report |
| 5. Certificates | Course Quick Reports / Default Report |
| 6. Name Tags | Course Quick Reports / Table Tent w/Logo |

Once the course is complete run the following reports:

- | | |
|--|------------------------------|
| 1. Reports / Accounting / Daily Income by Source by Course | Default Report (by course #) |
| 2. Reports / Accounting / Cashbox / Receipt Listing | Tuition Fee Breakdown |
| 3. Faculty / Check Request | Default Report (by course #) |
| 4. Faculty / Performance Data | Default Report (by course #) |

We do ____ do not ____ lock completed courses. The person responsible for this task is:

Maintenance Schedule

Task	When	How	Who is Responsible?
*Backup databases	Daily to Weekly	Tools > Backup Data	
Test backup	Quarterly	With everyone out of the system, run a backup, make a single change, restore backup and check that change is eliminated	
Re-index databases	Monthly (or as needed)	Tools > Database Admin > Pack/Re-index	
*Remove records marked for deletion (Pack)	Monthly (or as needed)	Tools > Database Admin > Pack/Re-index	
Deactivate Courses (i.e. remove courses from registration searches)	Monthly (or as required)	Module > Courses > Mass Change/Update/Delete	
Run The Catch All tool	Weekly (or as needed)	Tools > Data Cleanup > The Catch-All ...	
Upgrade system Quarterly (or as needed)	Quarterly (or as needed)	Download file is available on our Downloads site	
Clean up User Records (- delete records, review access levels, etc.)	Quarterly	Tools > Password Maintenance	
Purge Waitlists	End of Term (or as desired)	Module > Courses > Mass Change/Update/Delete	
Clean up codes (e.g. remove unused codes, deactivate/combine codes, etc.)	End of Term	Module > Codes	
Deactivate Tracking Codes	End of Term	Module > Codes	
Combine Duplicate Names	End of Term	Tools > Data Cleanup > Combine Names	
Purge Room Use Records	End of Term/Year (for previous term/year)	Module > Courses > Mass Change/Update/Delete	
Combine Duplicate Firms	Twice annually	Tools > Data Cleanup > Part 2 Firms	

Cleanup Additional Reports	Twice annually	Tools > Reports > Delete Additional Report	
Cleanup Queries	Twice annually	From appropriate Report Area (e.g. Reports > Registrations > Rosters)	
Lock Courses	End of fiscal year	Module > Courses > Mass Change/Update/Delete	
Review of SOP Manual	End of fiscal year		

*VFP Users Only. Your SQL database administrator is responsible to back up the database; records are automatically deleted in an SQL database.

Detailed instructions for all maintenance procedures are available in the [Online Reference Guide](#).

Task	Last completed on	Task next due on:	Who is Responsible?
Backup databases			
Test backup			
Reindex databases			
Remove records marked for deletion (Pack)			
Deactivate Courses (i.e. remove courses from registration searches)			
Upgrade system Quarterly (or as needed)			
Clean up User Records (-delete records, review access levels, etc.)			
Purge Waitlists End of Term (or as desired)			

Clean up codes (e.g. remove unused codes, deactivate/combine codes, etc.			
Deactivate Tracking Codes End of Term			
Combine Duplicate Names End of Term			
Purge Room Use Records End of Term/Year			
Combine Duplicate Firms			
Delete Orphan records			
Cleanup User-Defined Reports			
Cleanup Queries Twice Yearly From appropriate Report Area (e.g. Reports			
Lock Courses			
Review of SOP Manual			

When & how to call your tech

Every customer is assigned a dedicated tech at ACEware. Our tech is _____

The tech is available at 800-925-2493 x_____

Although ACEware will talk with anyone from our organization, our Student Manager keeper of the flame/guru/diva/resident expert is _____. Most concerns should be filtered through _____ before a call is placed to ACEware.

A few last minute notes

To see which optional modules are included with your Student Manager installation, click Help / About Student Manager / Show Optional Modules

You should not delete a payment if the payment has been assigned a receipt number

Preferences on each tab are color-coded:

Black - are user specific (they affect the user only).

Blue - are global (affect every user). You must have level 6 access to edit preferences in blue. Note: these should not be changed without the permission of your Student Manager administrator.

Purple - user must be a level 6 in the particular area to use the option (e.g. user must be level 6 in Pay to edit receipt numbers).