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

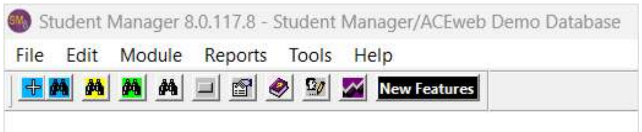
Throughout the manual there are screen shots, mostly of preference screens. These should be replaced with screen shots of your preference screens.

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 automagically 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.

Table of Contents

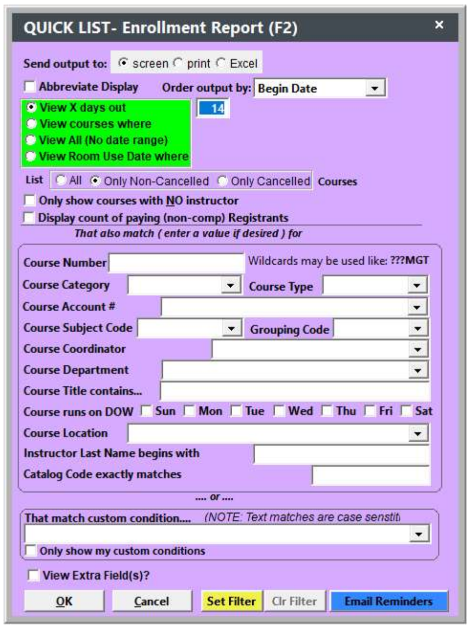
General Information

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

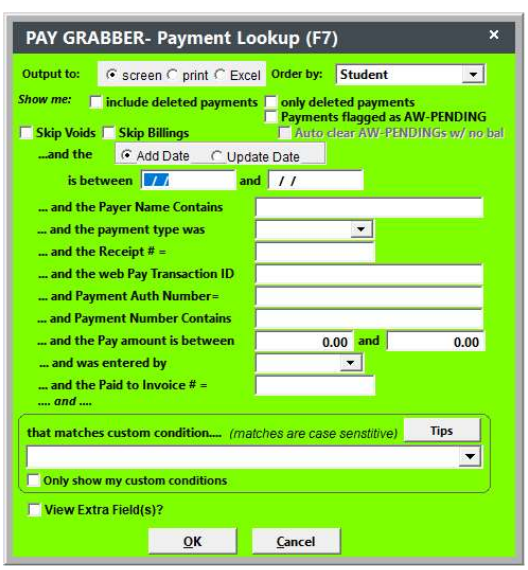


F6 resets system to recover from many errors. NOTE: any unsaved changes will be lost.

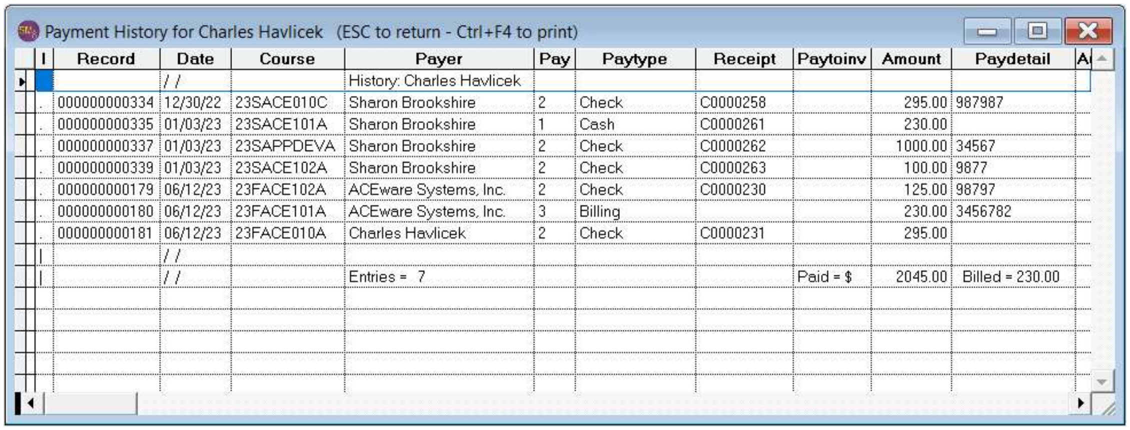
F2 is the **Quick Count** Enrollment Report



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



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



Payment History for Charles Havlicek (ESC to return - Ctrl+F4 to print)

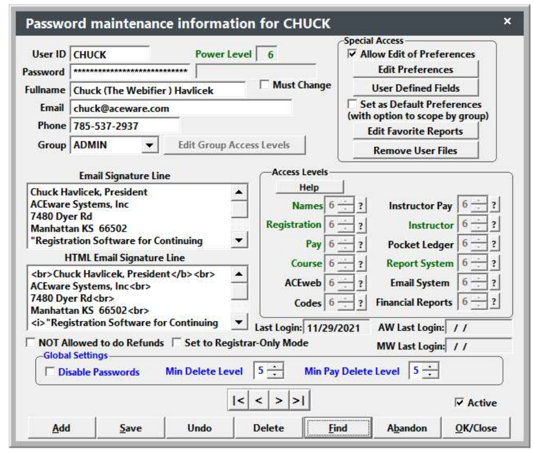
I	Record	Date	Course	Payer	Pay	Paytype	Receipt	Paytoinv	Amount	Paydetail	A
		/ /		History: Charles Havlicek							
.	000000000334	12/30/22	23SACE010C	Sharon Brookshire	2	Check	C0000258		295.00	987987	
.	000000000335	01/03/23	23SACE101A	Sharon Brookshire	1	Cash	C0000261		230.00		
.	000000000337	01/03/23	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	________
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____

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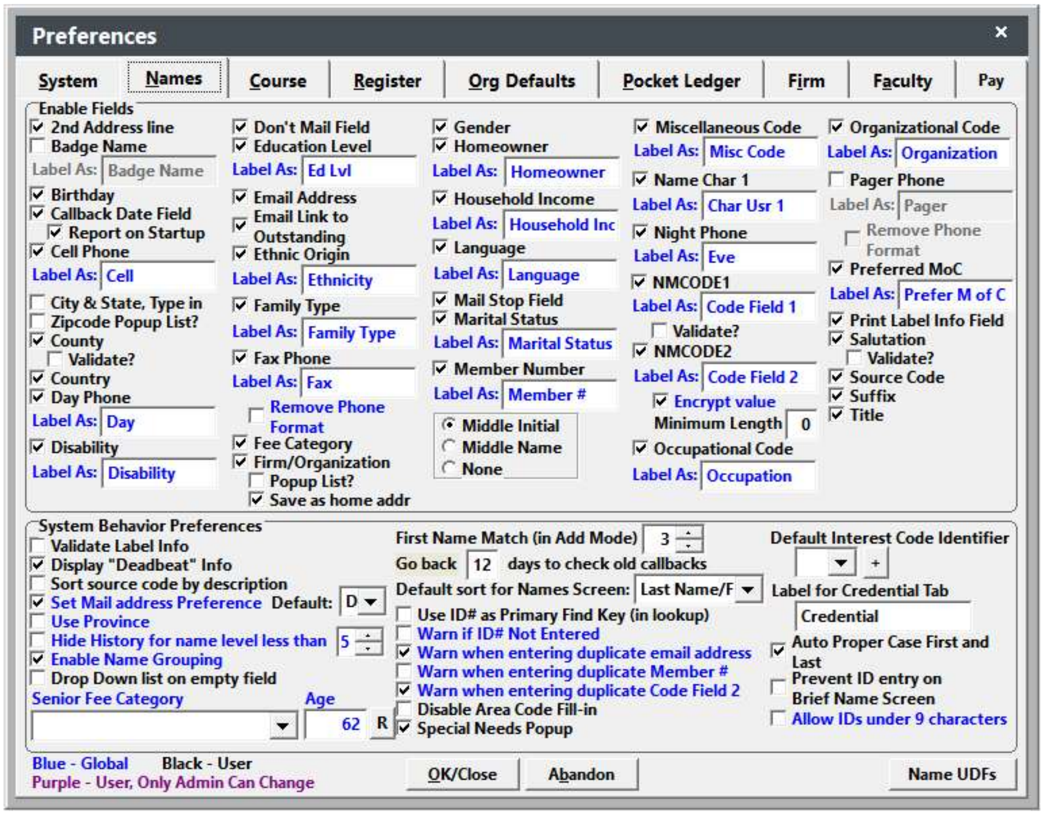
Pay	________	Pocket Ledger	________
Course	________	Report System	________
ACEweb	________	Email System	________
Codes	________	Financial Reports	________

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:



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

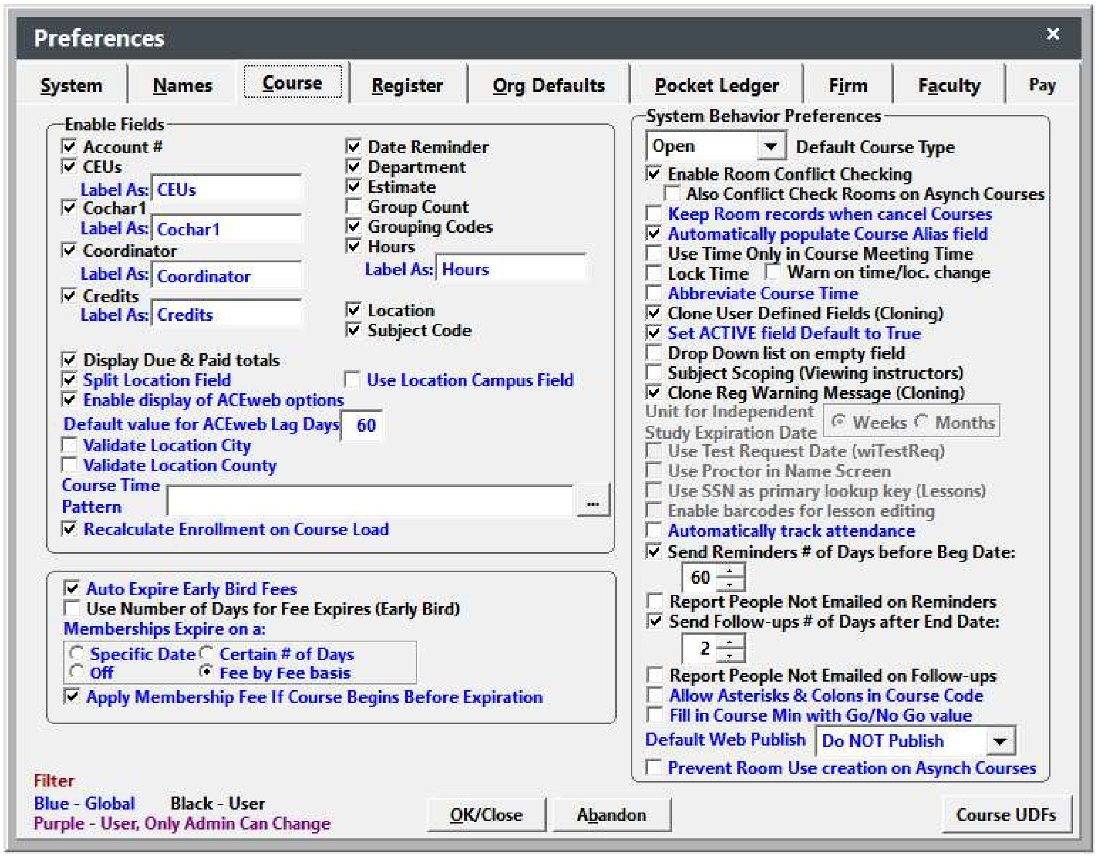
NOTE*: If multiple emails are stored in the email field on the name screen, the first email is used as the login for ACEweb*

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:



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:

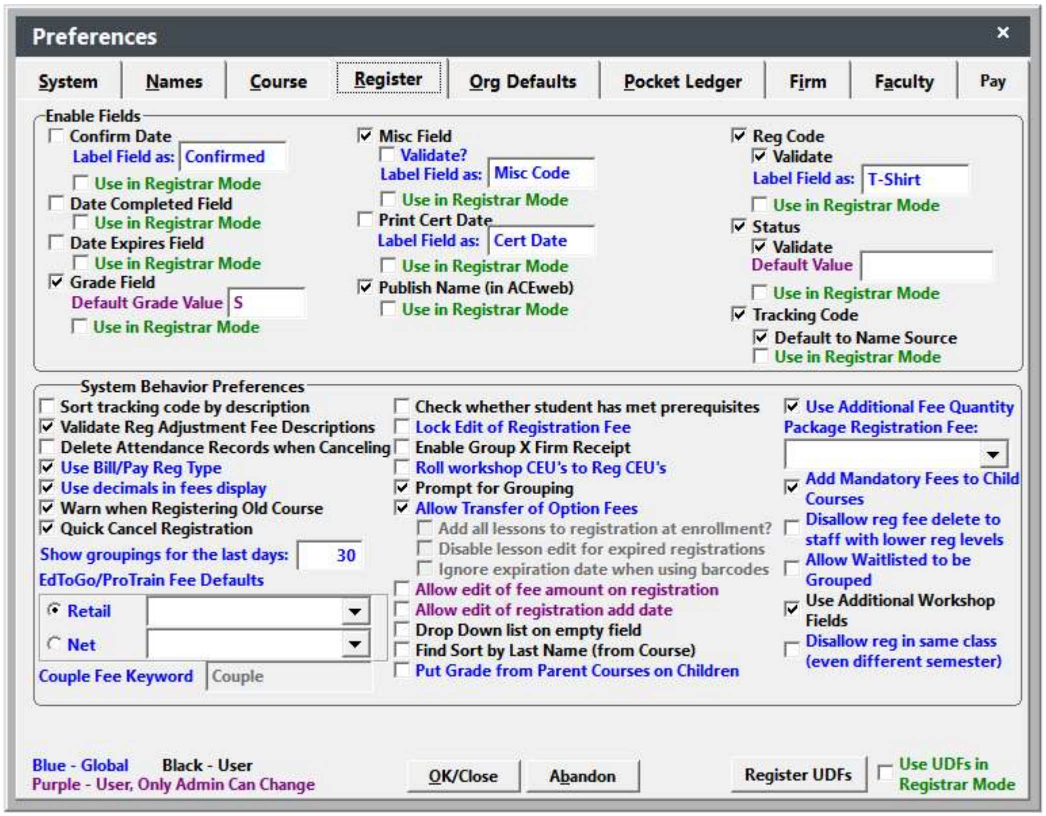
____ All courses

____ 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:



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.

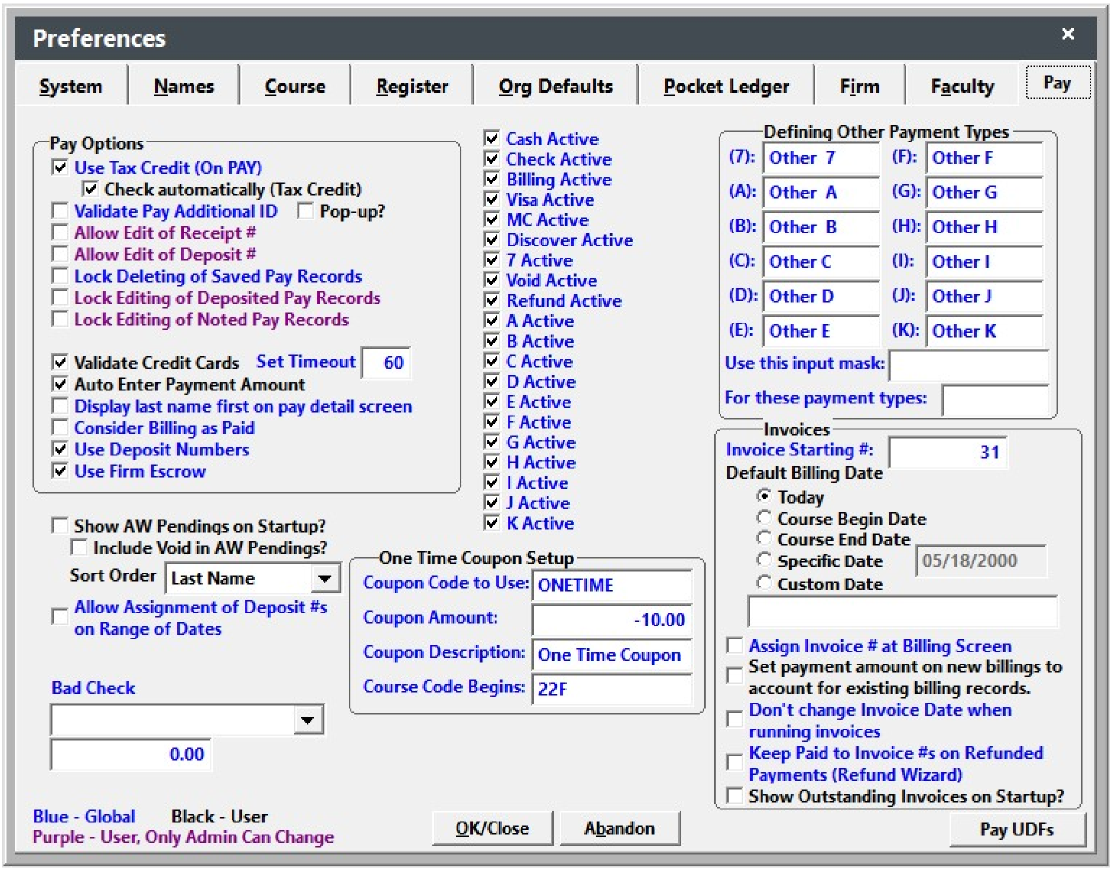
Additional help is available in the Student Manager online help guide.

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).