Student Manager 8.0

TRAINING GUIDE

Flexible, Scalable, Powerful

Student Registration Software

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Training Guide Use

This guide is a supplement to the training session. While, it includes examples of several techniques, we tailor each training session to the needs of the students attending. Therefore, the trainer may use different examples.

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 training guide. You can download the demo on our ACEware website:

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

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UNIT 1

INTRODUCTION TO STUDENT MANAGER

Unit Objectives

In this unit, you will learn to:

- Start Student Manager
- Log in
- Use the Navigation Tools
- View/Edit User Information
- Access Help
- View/Edit Preferences
- Add/Edit Codes

Opening and Logging into Student Manager

Double-click the icon on the computer's desktop to start Student Manager:

For this training session, enter the following User ID and Password:

User ID: *ACE*
Password: *ACE*

Checking the *Remember Me on This Computer* saves your credentials so you don’t need to enter your credentials when starting Student Manager.

Note: this user name and password is only used when accessing the training system. When you log into your organization’s system (i.e. at your workstation), you will enter the user name and password your Student Manager administrator gave you.

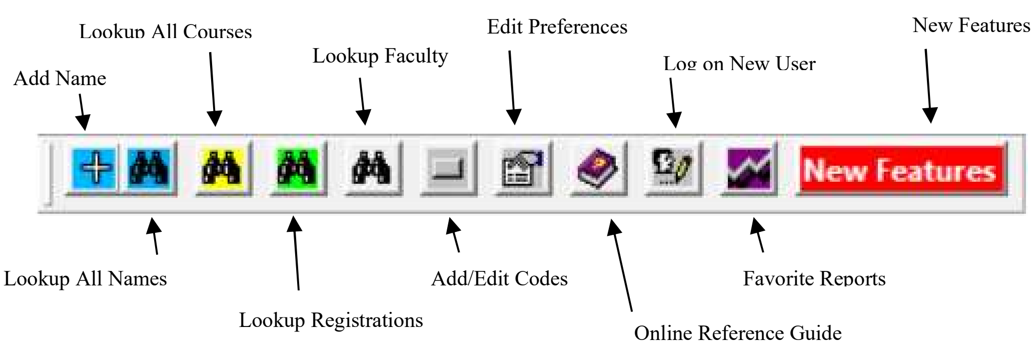
Student Manager Main Menu

Access the following from the Student Manager Main Menu:

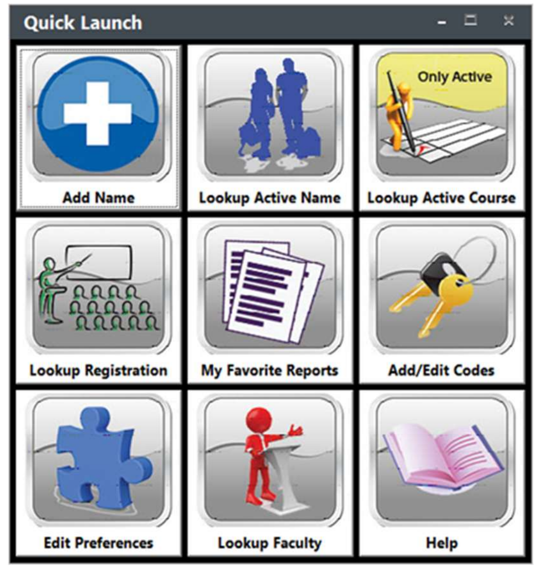
- File – Create and Find records, Save changes to current record, and Exit Student Manager.
- Edit – Undo, Copy, Edit, Paste, Clone and Paste Name record, Preferences and User Profile.
- Module - Access Names, Course, Registration, Firms, Zip Codes, Locations, Holidays, and Optional modules.
- Reports - 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).

Student Manager Toolbar

Perform the following actions from the Student Manager 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

-- Moves to the first record of the database.*

-- Moves to the next record.*

-- Moves to the previous record.*

-- Moves to the last record of the database.*

-- Create a new record.*

-- Saves any edits you have made.

-- Undo any edits made since your last save.

-- Marks the record for deletion.

-- Locates a specific record from the database.*

-- Cancels any edits and closes the screen.**

-- Saves edits and closes the screen.*

*Changes are saved to the record before navigating to the next record or closing the screen.

**Closes 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 A.

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.

Viewing/Editing User Information

You can view and edit, your User Information by selecting **Edit > My User Profile**. Your user information is used in reports and in emails sent within Student Manager.

Note: you can store messages in the *Alt+F3, F4, or F5* fields that can be recalled into a Student Manager field/query by using the appropriate shortcut key.

Accessing Help

Student Manager provides you with an Online Reference Guide to help you make the most of the program. You access the Guide from within Student Manager in one of the following ways:

✓ Click the Help icon on the Student Manager Toolbar.

✓ Click the Help icon on the Student Manager Quick Launch.

✓ Select **Help > Help**

The Online Reference Guide will open in your web browser.

Student Manager Preferences

Determine what fields you will use and behavior options for the various modules from the Student Manager Preferences screen. You can access Student Manager Preferences in one of these two ways:

✓ Click the Preferences icon on the Student Manager Toolbar.

✓ Click the Edit Preferences icon on the Student Manager Quick Launch.

✓ Select **Edit > Preferences**.

Preferences are grouped on tabs. Preferences on the tabs are color-coded:

- Black - are user specific (they affect the user only).
- Blue - are global (effect every user). You must have level 6 access to edit preferences in blue.
- Purple - require a security level 6 to change--AND the user must be a level 6 in the particular area to use the option (e.g. user must have a level 6 in Pay to edit receipt numbers).

Note: your Student Manager Administrator can dis-allow your ability to edit preferences. If your Preferences icon is grayed out (on your own system at your organization), you don't have rights to edit your preferences. Please see your Student Manager administrator for more information.

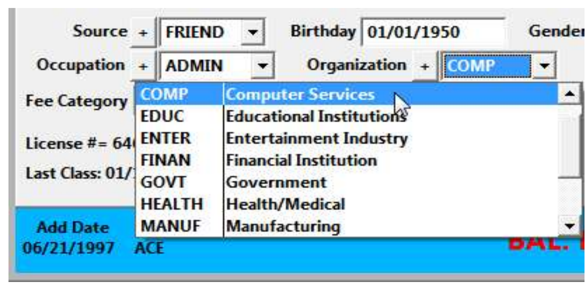
Student Manager Codes

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

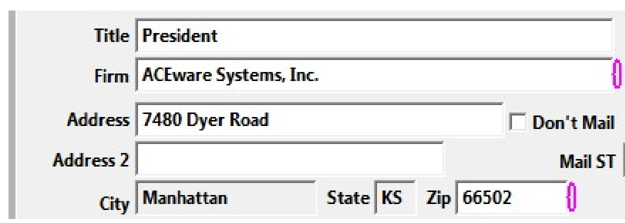
- You cannot enter an invalid date such as April 31st.
- Each name record must have a unique ID number.
- Each course record must have a unique Course Code.
- A course must exist in the database before you can register anyone in the course.
- A registration must exist in the database before you can make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

Field Validation

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



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



The system checks the Data Validation list and if the code does not exist, you are given the opportunity to add a new code. E.g. if entering a firm that is not in your Firms database.

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

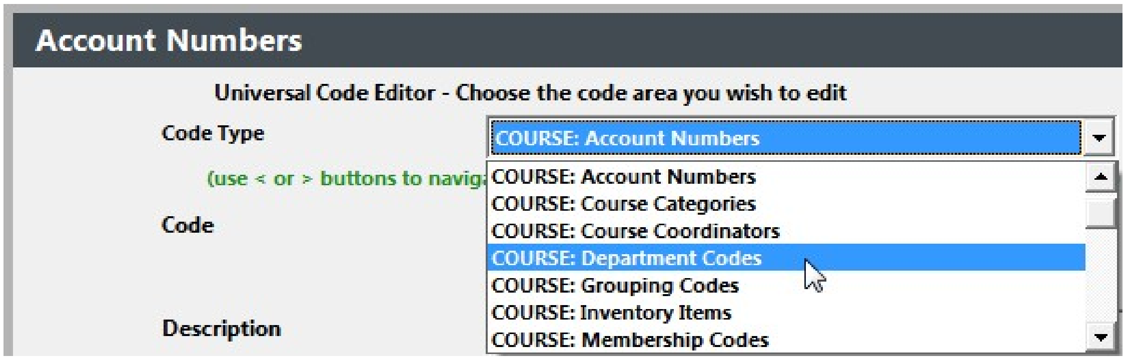
Most codes are added/edited on the Codes screen. You can access the screen in the following ways:

✓ Click the Add/Edit Codes icon on the Student Manager Toolbar.

✓ Click the Add/Edit Codes icon on the Student Manager Quick Launch.

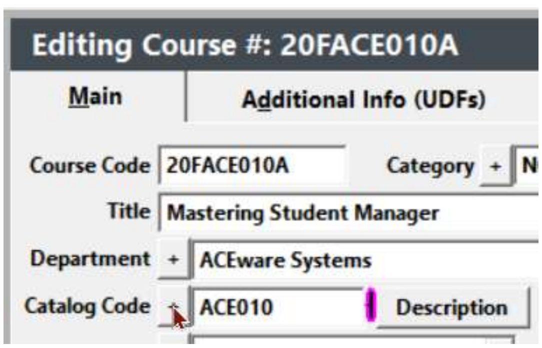
✓ Select **Module > Codes**.

To edit a code, select the code type from the *Code Type* drop down list.



Once you select the code type, you can click the **FIND** button to select a specific code for that code type, or click the Add button to add a new code for the code type.

Note: you can also add a new code for a specific code type from the module record by clicking the Plus sign [+] button next to the appropriate field. This opens the **CODES** screen for the particular code. You are already placed in 'Add' mode so enter the *Code* and *Description* in the appropriate fields then click the **OK/CLOSE** button to save the new code and close the **CODES** screen. The new code will now be available in the Code list (drop down menu).



Other Codes

Codes not added/edited on the Codes screen are accessed in these ways:

- ✓ Locations – **Module > Locations.**
- ✓ Holiday Dates – Holiday Dates are technically not codes but the system takes them into account when calculating course ending dates and room scheduling so they must be set up before you schedule a course. Add/edit Holiday Dates from **Module > Holidays**.
- ✓ Catalog Codes – **Module > Catalog > Catalog Codes**
- ✓ Firms – **Module > Firms**
- ✓ Zip Codes – **Module > Zip Codes**

UNIT 2
ADDING/EDITING COURSES

Unit Objectives

In this unit, you will learn to:

- Look up course records
- Add course records
- Clone course records
- View/Customize Room Use records
- Change Course Status
- View/Edit Course Type
- Print Course Quick Reports

Looking Up Courses

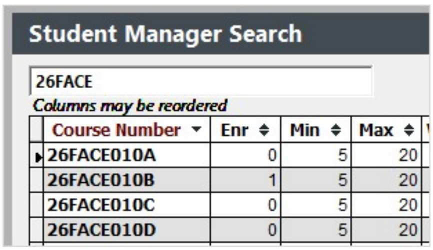
Look up courses in any of the following ways:

✓ Click the Lookup Active Course icon on the Quick Launch screen.

✓ Click the Lookup Course icon on the Student Manager Toolbar.

✓ Select **File > Find > Courses** or **Module > Courses > Find Course**

✓ Press Alt+J



Exercise: find and open the 26FACE010A course.

Finding Record

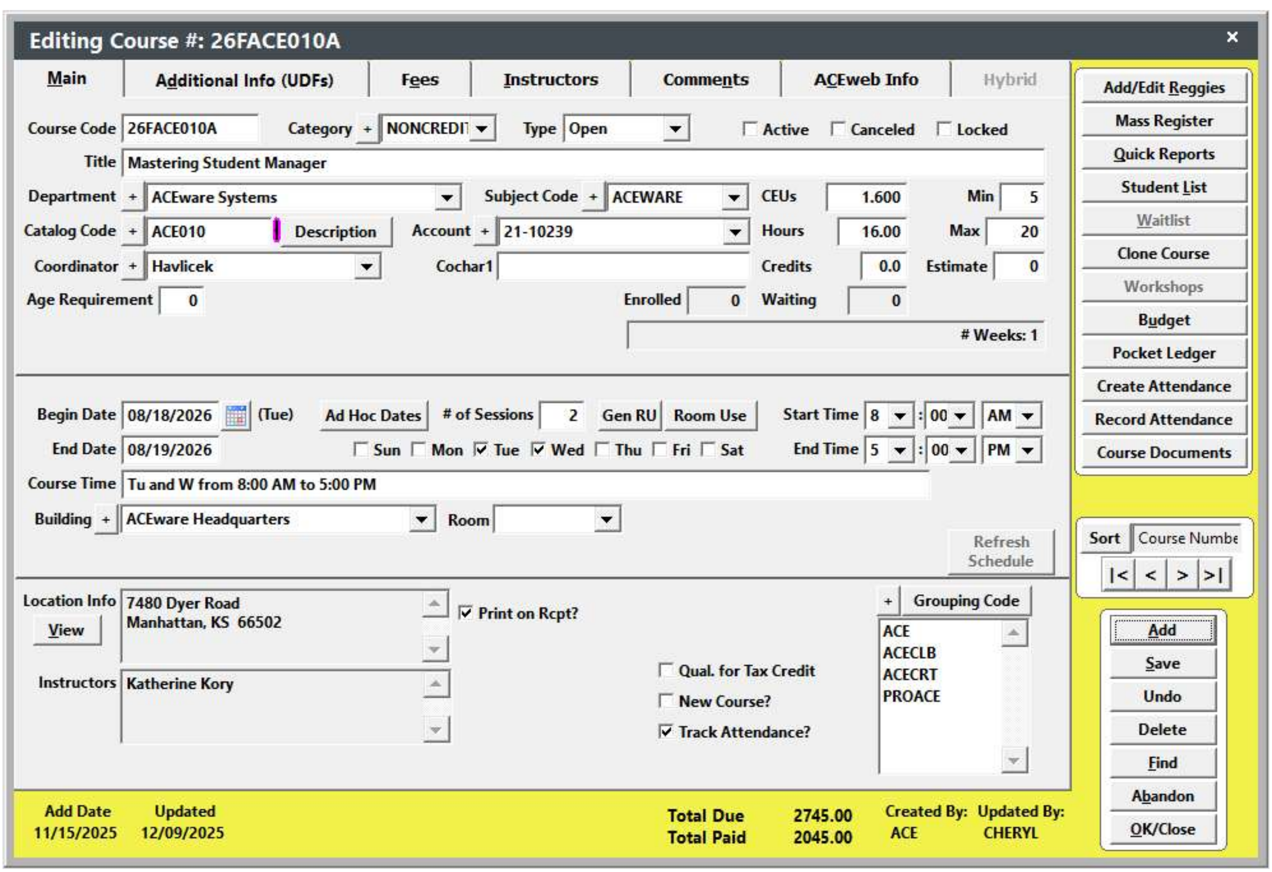
Type a search term and the system will return records containing your search term in the Search Key fields.

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

Double-click the entry or press the Tab key to move from the Search field to the list of records, use your arrows to scroll to the one you want, and hit enter.

Course Screen



The **COURSE** screen consists of 7 tabs:

- Main Tab – Course information such as Code, Title, Location, Start Time, # of Sessions, is entered on this tab.
- Additional Info Tab – Registration Times, Email Attachment, Alternate Course Display Code, Person to Notify and Course User Defined Fields are entered on this tab.
- Fees Tab – Main registration fees and Other fees tab (i.e. Optional fees, Mandatory fees, coupon codes (ACEweb) and Inventory Items) are set up on this.
- Instructors – Course instructors are assigned on this tab. You can also set pay details, presentation notes, and evaluation codes.
- Comments Tab – Course notes are entered on this tab such as notes that will print on receipts, internal notes, and registration warning messages.
- ACEweb Info Tab – ACEweb options are set on this tab such as Web display properties, Workshop minimums, special pages, etc.
- Hybrid Tab – number of physical seats and virtual notes are entered on this tab.

Adding A New Course Record

To add a new course record:

✓ Select **File > New > Course**

✓ Select **Module > Courses > Add Course**

✓ If the **COURSE** screen is open, click the **ADD** button.

EXERCISE: create a new course record:

1. Enter the following in the appropriate fields:

Course Code	*26FPRGMNG*	Begin Date:	*12082026*
Title	*Introduction to Programming*	#of Sessions	*6*
Department	*Information Systems*	Days	*T, Th*
Subject Code	*COMPUTER*	Start Time	*9*
Catalog	*PRGMNG*	St Time Min	*00*
Account	*21-10239*	AM/PM	*AM*
Coord	*Havlicek*	End Time	*11*
CEUS	*2.4*	E Time Min	*45*
Hours	*24*	AM/PM	*AM*
Min	*15*	Building	*Nebraska Center*
Max	*25*	Rm	*112*
Estimate	*20*	Check the *Print On Receipt* Box	

2. Click the **SAVE** button.

When you save the record, the other tabs become available.

Adding Course Fees

Select the Course Fees tab. Course Fees are divided into two categories:

Main Fees – the main registration fee individuals pay when registering for a course. A course can have an unlimited amount of Main fees. However, a registrant can only be assessed one Main fee, i.e. the registration fee for which he/she qualifies.

Other Fees – other fees associated with the course such as Lab fees, Parking fees, Textbook fees, etc. Other fees can also be set up as Mandatory. Mandatory fees are automatically assessed to a registrant when he/she enrolls in the course. A course can have an unlimited amount of Other fees, and registrants can be assessed an unlimited amount of Other fees.

EXERCISE: add the following Main Fees:

1. Select the Fees tab.
2. Click the **ADD MAIN FEE** button.
3. Select *Early Bird Fee* from the Fee Description drop down menu.
4. Enter *250.00* in the Amount field.
5. Enter *30* in the Expires field.
6. Click the **ADD MAIN FEE** button again to add another Main Fee:
7. Select *Registration Fee* from the drop down menu.
8. Enter *300.*00 in the Amount field.

EXERCISE: add the following Other Fees:

1. Click the **ADD OTHER FEE** button.
2. Select *Book* from the Fee Description drop down menu.
3. Enter *55.00* in the Amount field.
4. Select *Yes* in the Mandatory column.
5. Click the **ADD OTHER FEE** button to add another Optional Fee:
6. Select *Calculator* drop down menu.
7. Enter *45.00* in the Amount field.

Deleting Fees

To mark a fee for deletion:

1. Select the fee you want to delete.
2. Click on the White box to the left of the Fee Description field. This will turn the box Black.
3. Click the **SAVE** button to save your changes.

Un-delete Fee

To un-delete the Fee, click the box to turn it white again.

Adding Instructor(s)

Select the Instructors tab.

EXERCISE: assign the following instructor to the course:

1. Select the Instructors tab.
2. Click the Plus Sign [+] button to the left of the Current Instructor field to select an instructor.
3. Select *Bill Clark* from the list.
4. Select the *Per Class Session* pay type.
5. Enter *200.00* in the Pay rate field.

Assigning Another Instructor

To assign another instructor to the course, click the Plus Sign [+] button again and select the instructor. Each instructor will have his/her own payment/presentation record. To view a specific instructor's information, select the appropriate instructor from the *Current Instructor* list.

Adding Course Notes

Select the Comments tab. There are three types of Course Comments:

- Registration Warning Message - notes entered in this field will pop up whenever you register an individual in the course (useful for notifying registration staff of special instructions or requirements).
- Note (May be printed on receipt) - include notes that you want to print on registration receipts (useful to notify individuals of special instructions, such as a reminder to bring course materials to the first class).
- Comments (Reminder Note) - notes for yourself or another user, such as the date the catering order should be submitted.

EXERCISE: add the following course notes:

1. Enter *Bring supervisory manual to first class* in the Notes (may be printed on receipt) field.
2. Enter *Order coffee and rolls from caterer* on the Comments (Reminder Note) field.
3. Enter *ACE* in the Remind field.
4. Enter tomorrow's date in the Date field.
5. Click the **SAVE** button to save your changes to the course record.

NOTE: We'll utilize this course record throughout the exercises in this guide.

Cloning Courses

Cloning a course allows you to copy the information from a course record into a new course record (including fees, location, instructor, notes). All you'll need to do is change the course code (e.g. change the semester or section characters) and enter the dates of the new course. To clone a course:

1. Look up the *26FPRGMNG* course.
2. Click the **CLONE COURSE** button.
3. Enter the new course code: *27SPRGMNG.* Then click the **OK** button.
4. The system creates a course record with the new course number and copies the information from *26FPRGMNG* into it. All you will need to do is enter the Begin date and select days of week.
5. Change the Begin Date to: *01052027*
6. Click the **SAVE** button.

Viewing/Customizing Room Use Records

When the course is created, the system creates a room use record for each session. To view the room use records, click the **ROOM USE** button.

Course Room Use records are customizable. You may change the Session Date, Start Hour, Start Min, End Hour, End Min, and Location of each session. For instance, you may need to schedule one session at a different location or change the meeting time of a session.

To customize the Room Use records:

1. Open the course record.
2. Click the **ROOM USE** button to open the **EDIT ROOM USE** screen.
3. Highlight the record you want to change.
4. Make the necessary changes in the Date, Start, End, Building, and Room fields.
5. Click the **SAVE** button to save your changes.
6. Click the **OK/CLOSE** button to close the **EDIT ROOM USE** screen.

Changing Course Status

When you create a course record, it's *Active* by default. Active courses are open for enrollment and appear in all registration routines.

Other Course Status Options

You also have the option of deactivating, canceling, and/or locking courses.

<u>Deactivating Courses</u> - removes it from the active courses list when you register individuals from the regular registration routines. To deactivate a course, uncheck the *Active* box.

You may still register individuals with the **ADD/EDIT REGGIES** button on the Course screen or from **Module > Registrations > Add/Edit Registrations (by Course)**.

Canceling Courses - canceling a course removes the course from all Registration routines. In addition, canceled courses will not be included in most reports unless you specifically request to include canceled records in the report.

To cancel a course that has no registrations, un-check the *Active* box then check the *Canceled* box. However, if the course has registrations, you must run the Cancel Course Wizard. We'll discuss the Wizard in a later section.

Locking Courses - locking a course restricts all users from making any changes to the course record, registrations, or payments. To lock a course, check the *Locked* field. Locking a course is useful for accounting purposes to lock records after a course has finished.

Mass Update/Change

Mass Update/Change allows you to deactivate or lock a series of courses. It also allows you to change web publish/register status, archive, assign fees, purge waitlists, and delete old room use records. To run Mass Update/Change:

1. Select **Module > Courses > Mass Change/Update/Delete/Archive** to open the **MASS UPDATE/CHANGE** screen.
2. Select the action you want to perform (e.g. deactivate courses, purge waitlists).
3. Select courses beginning between dates and/or scope by course number.
4. To preview the courses, click the **PREVIEW** button.
5. Click the **OK** button to make the change.

Viewing/Changing Course Type

The Course Type is an internal code identifying the type of course. Course behavior is determined by the selected type.

- Open – standard type course.
- Pending – courses under development. Pending courses are automatically deactivated.
- Online – adds the Date Opened for Enrollment field to the **COURSE** screen to set the date the course will be opened for enrollment (note: you don't enter a Begin date on Online courses).
- Membership – used with Membership option.
- Donation – used with ACEweb's donation option.
- Event – allows users to purchase multiple tickets.
- Workshop (optional module) – create workshops for the course. The Workshop type does NOT allow multiple registrations.
- Ind Study – only used with Independent Study Module.
- Inventory – identifies a course record used for inventory.
- Contract – private course (e.g. for employees of a specific company).
- Package1 and Package2 – only available with course Packaging module. Identifies course as the parent of a package.
- Hybrid - set up Hybrid courses where you have physical and virtual attendees.

Course Quick Reports

The Course Quick Report button allows you to print rosters, name tags, mailing labels, certificates, course description, or faculty contracts for the particular course.

EXERCISE: print a course quick report.

1. Look up the 26SACE010A course record.
2. Click the **QUICK REPORTS** button to open the **QUICK REPORTS** screen.
3. Check the *Name Roster* box (if any other boxes are checked, un-check them).
4. Click the **OK** button to preview/print the report.

Notes:

- The system will print all marked reports (checked ones), one right after the other.
- If your organization has the Email module, you can also email rosters to instructors, email regular and waitlisted registrants from Quick Reports.
- If the course has no registrations, you will only have the option to print class descriptions and faculty contracts.
- If you want waitlisted registrants included in reports, you must check the *Show waitlists (on rosters)* box.

UNIT 3
ADDING/EDITING NAMES

Unit Objectives

In this unit, you will learn to:

- Look up name records
- Add name records
- Set Flag fields
- Enter Call Backs
- Keep Contact Log
- Clone Names
- Add Firms
- Group Names
- Print Name Quick Reports

Looking Up Name Records

Look up Names in any of the following ways:

✓ Click the Lookup Name icon on the Quick Launch screen.

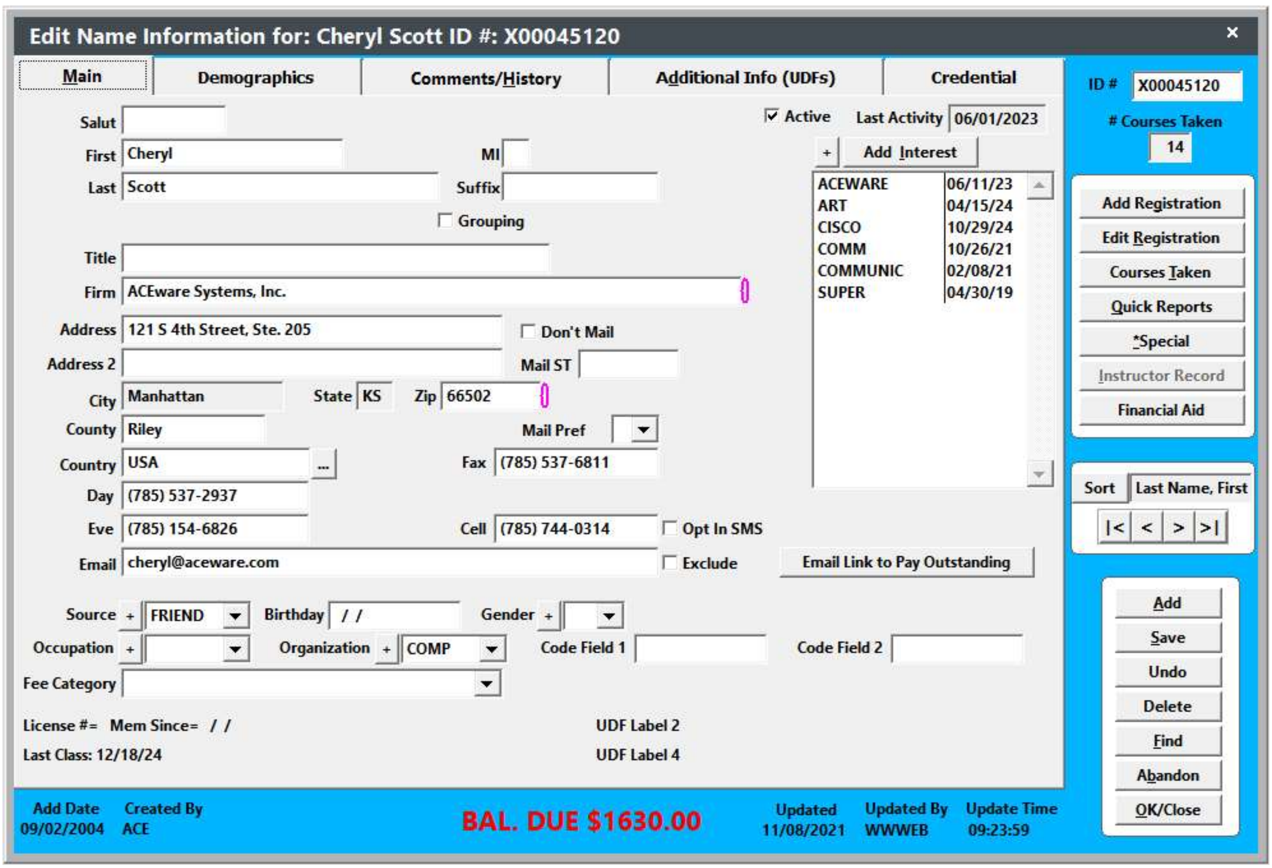
✓ Click the Lookup Names icon on the Student Manager Toolbar

✓ Select **File > Find > Names or Module > Names > Find Name**

✓ Press Alt+L

When the **STUDENT MANAGER SEARCH** window opens, look up Cheryl Scott.

Names Screen



The **NAMES** screen consists of 5 tabs:

- Main Tab - Individual's personal data such as Name, Address, Phone Numbers, etc.
- Demographics – additional demographic data, flags to help with reports, membership information.
- Comments/History Tab - Comments, Contact Log, Special Needs are entered on this tab.
- Additional Info - Name User Defined Fields are entered on this tab. Contents of user defined fields can also be displayed on the Main tab (under Fee Category field).
- Credential Tab - Credentials are multi-purpose records which allow you to track other information about the student such as courses from other sources and job placement information.

Adding a New Name Record

To add a new Name record:

✓ Click the **ADD NEW NAME** icon on the Student Manager Toolbar.

✓ Select **File** > **New** > **Name** or **Module** > **Names** > **Add New Name**

✓ Press <u>Alt+A</u>

EXERCISE: create a new name record:

1. Enter the following information:

Salut	*Mr.*	<u>*****IMPORTANT*****</u> Most character fields are automatically capitalized. Because of this we STRONGLY discourage using CAPS LOCK when entering data.
First	*Adam*	
Middle	*A*	
Last	*Miller*	
Suffix	*No suffix*	
Address 1	*1000 Any Lane*	
Zip Code	*66502*	
Day	*5553333*	
Eve	*5554444*	
Email	*aamiller@imaginary.com*	
Fee Category	*Senior Citizen*	*Set a default fee category for an individual's future registrations. The individual will automatically be assessed the fee--IF it has been set up in the course and IF that fee is the lowest they qualify for..
Birthday	*01/01/1980*	
Sex	*M*	

2. Click the **SAVE** button to save your new record. Note that the system assigns a computer generated ID to the record (in the SSN/ID field).

Assigning Codes

The Name Codes fields track how an individual heard of your program (Source), occupation (Occupation) and type of company (Organization), and interests (Interest).

1. Enter the following Codes:

Source	*FRIEND*
Occupation	*SALES*
Organization	*RETAIL*

2. To add Interest codes, click the **ADD INTEREST** button. Select the following Interest Codes (<u>Ctrl+Click</u> to select multiple codes), then click the **OK** button to add them to the record and return to the Names screen.

Interest Code	*Market*
Interest Code	*Sales*

Note: to remove an interest code from a record, double-click the entry in the Interest Code window.

Flag Fields

The Names screen offers the following flag fields to help with mass mailing and reporting needs:

- Don't Mail Flag - check this field to identify individuals who don't want to receive mass mailings.
- Excl Flag (Email Module Users Only) - check this field to identify individuals who don't want to receive mass emailings.
- Label Flag - check this field to include the individual in one-time mailing lists or generate mailing labels for an eclectic (non-permanently defined) group. Note: an optional field, located just under the Label Flag, is also available to use in tandem with the Label Flag. In this field, you identify the type of mailing to send to the individual (e.g. brochure, catalog, flyer).
- Report Label Flag - check this field (just above the Label Flag, see above) to include individuals in subsets of records for special reporting purposes.

EXERCISE: check the Print Label Flag on Adam's record then enter *Brochure* in the Label Info field.

Note: we'll see how the Print Label option works in the Reporting unit.

Call Back System

Student Manager offers a feature that will remind users to call individuals on a specific date. If enabled, the system will check for call backs during startup and display the call back list for that date. Scope the call backs by user and the system will only list the call backs for the particular user.

1. Enter the current date in the Call Back date field.
2. Click the **OK/CLOSE** button on the Maintain Names screen.
3. Close Student Manager (**File > Exit**).
4. Restart Student Manager.

During Student Manager's startup process, the system will check for call backs and display a list of call backs for you (if any).

*Special Call Back Tool

There is a *Special tool available that allows you to schedule a Call Back (for yourself) 10 days in the future. To use this tool, click the ***SPECIAL** button then click the **CALLBACK** button.

Adding Comments

Add comments about the individual, such as special needs or contact information on the Comments/History tab. This tab contains 3 fields into which you can enter comments:

- Comments - internal notes about the individual.
- Contact History - log contacts with individual (e.g. emails sent via Student Manager, phone calls, etc.).
- Special Needs - an individual's special needs. Messages in this field will pop up when someone accesses the name record.

EXERCISE: add a comment to Adam's record.

1. Enter *Adam is hearing impaired* in the Special Needs field.
2. Click the **OK/CLOSE** button to save the changes and close the **NAMES** screen.
3. Look up Adam's record again--the message should pop up when the record opens.

Contact Log

Student Manager provides you with a tool that allows you to log your contacts with individuals. To use this tool:

1. Select the Main tab.
2. Click the ***SPECIAL** button
3. Click the **CONTACT HISTORY** button.

This will insert a new line at the top of the Contact History field (Name Comments/History tab) and stamps the current date and username at the beginning of the line. Simply add your comments then close the window. Every time you need to log another contact, just repeat the process.

Additional Info

The Names User Defined Fields are on the Additional Info tab. These are fields that your organization can use to collect data specific to your organization (e.g. name of individual's spouse, hotel in which registrant is registered, etc.).

EXERCISE: enter *12345* in the License # field and enter *01012000* in the Mem Since field.

Note: you can display UDF entries on the Main tab of the name record. To see this option, click the **SAVE** button to save your changes. When you save the record, you are moved back to the Main tab and you should now see the UDF data just under the Fee Category field:

Adding Firm

When entering the firm in a Name record, the default behavior is to save the Firm address and phone number (day phone) into the Name record.

EXERCISE: create a Name record for yourself and enter your firm into the Firm field.

1. Use one of the Add options (see page 18) to add a Name record.
2. Enter your name, title and firm into the appropriate fields.
3. Since there is no record for your firm in the system, when you tab out of the Firm field the system will bring up the Find firm window. Press the ESC key to close the window.
4. The system will then ask if you want to create a firm record. Click the **YES** button.
5. This opens the **FIRM** screen. Enter your address, zip code, and phone number (firm name will already be added for you).

6. Click the **OK/CLOSE** button on the **FIRM** screen. You'll be returned to the Name record with the firm information entered into the appropriate fields.
7. Continue entering your name data then click the **SAVE** button to save your record.

Cloning/Pasting Records

You can copy information from one record and paste it into a new one. This is useful when adding members of the same household or firm to the Names database.

EXERCISE: create a record for Adam Miller's wife, Andrea, using the Clone/Paste Name routine.

1. Open Adam Miller's record.
2. Select **Edit > Copy Name** to copy the information.
3. Click the **ADD** button to create a new record.
4. Select **Edit > Paste Name** to paste the information into the new record.
5. Enter *Andrea* in the First name field.
6. Click the **SAVE** button to save the new record.

Name Grouping

Group a series of Name records together and set one member as primary contact for the group (useful when you want you want to send catalogs to only one member of the group). Note: A name that is pasted from another record is automatically grouped with the record you pasted from.

EXERCISE: group Tom and Debra Jones together and set Debra as the Primary member:

1. Since the Name Grouping option is not enabled in the demo, we must enable it first. To do so, close the **NAMES** screen, then open the Preferences screen and select the Names tab. Now, check the *Enable Name Grouping* box (lower left of tab) then click the **OK/CLOSE** button to save your changes.
2. Look up Tom's record.
3. Check the Grouping box to open the **NAME GROUPING** screen. Tom's name is already added to the list.
4. Click the **ADD NAME** button.
5. Select Debra Jones. When you select her record, you'll be returned to the **NAME GROUPING** screen and her name will be added to the list.
6. Click on Debra's name in the window.
7. Click the **SET AS PRIMARY** button to set Debra as the primary contact.
8. Click the **OK** button to close the screen and return to the Name record.

This routine saves the primary contact's SSN/ID # in the Nmgroupid field on all name records in the group. There is a special report in the Mailing Labels area that only prints one label for the group's primary contact instead of printing one for each family member. We'll take a look at that report in the Reporting Unit.

Name Quick Reports

The Names **QUICK REPORT** button allows you to print fax cover, envelope, transcript, or letter for particular individual.

EXERCISE: print a name quick report.

1. Look up Adam Miller's name record.
2. Click the **QUICK REPORTS** button.
3. Click the **OK** button to preview/print the report.

Notes:

- If your organization has the Email module, you can email the individual from Quick Reports.
- If your organization has the Customer Relationship Management module, you can record a contact from Quick Reports.
- If you always print the same Quick Report and just want to send it to the printer when you click the Quick Reports button, uncheck the *Continue to display this screen* box.

UNIT 4

REGISTERING INDIVIDUALS IN COURSES

Unit Objectives

In this unit, you will learn to:

- Add Registrations
- Assess Fees
- Make Payments
- Print Receipts
- Make Partial Payments
- Create Billings
- Void Payments
- Cancel Registrations
- Issue Refunds
- Transfer Registrations
- Transfer Payments
- Group/Ungroup Registrations

Looking Up Registration Records

Look up registrations in any of the following ways:

✓ If you have the name record open, click the **EDIT REGISTRATION** button.

✓ Click the Lookup Registration icon on the Quick Launch.

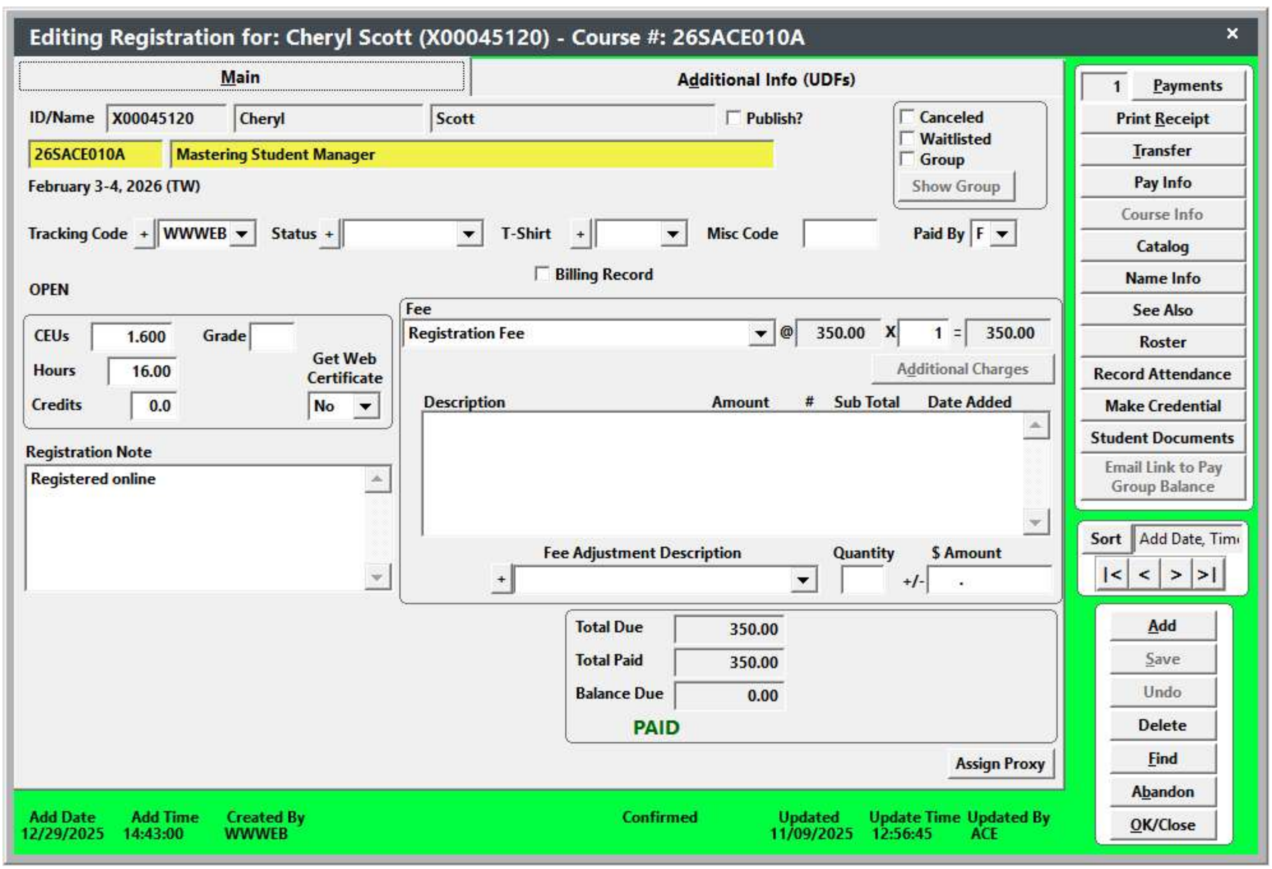
✓ Click the Lookup Registration icon on the Student Manager Toolbar.

✓ Select **File > Find > Registration** or **Module > Registrations > Add/Edit Registrations (by Registrant)**

✓ Press <u>Alt+G</u> to highlight the **Module > Registrations > Add/Edit Registrations (by Registrant)** menu item, then pressing the <u>Enter</u> key to select the menu item.

EXERCISE: look up Charles Havlicek's name record and click the Edit Registration button to view his registrations. Then click the Find button and select the *26SACE010A* registration.

Registration Screen



The **REGISTRATION** screen consists of 2 tabs:

- Main Tab - Registration information is entered on this tab such as fee assessed and CEU/Hours/Credits/Grade earned.
- Additional Info - Registration User Defined Fields are entered on this tab.

Registering an Individual

The recommended method for registering individuals is through the **NAMES** screen. This allows you to verify and make any necessary changes to the individuals' contact information before enrolling them.

EXERCISE: register Adam in a course. To do so:

1. Lookup Adam's Name record.
2. When the **NAMES** screen opens, click the **ADD REGISTRATION** button.
3. Select the *26FPRGMNG* course.

The **REGISTRATION** screen now appears with the Registration information auto entered into the appropriate fields (i.e. ID and name, course info, main fee, total due, etc.). Adam received the Early Bird fee because he registered more than 30 days before the course begins. He was also assessed the mandatory Book fee (in the Additional Charges window).

Assessing Additional Charges

To manually assess Additional Charges:

1. Click the **ADDITIONAL CHARGES** button.
2. Select the appropriate fee (i.e. Calculator). The charge is added to the Additional Charges window and the *Total Due* is updated.
3. Click the **SAVE** button to save the registration.

Assessing Fee Adjustments

You can also assess fee adjustments to a registration such as special charges (e.g. NSF fee) or discounts (e.g. coupon offering).

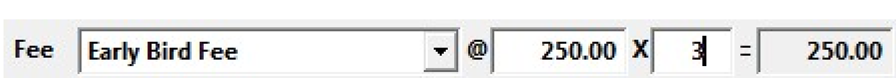
EXERCISE: add a coupon discount to this registration.

1. Click on the Fee Adjustment Description drop down and select *Coupon Adjustment*.
2. Tab to the Amoun*t* field and enter *-25.00*. Note: if you are assessing a discount, you must enter the minus sign (-) as the first character of the amount, e.g. -25.00.

3. When you type the last zero in the Amount field, the entry will automatically move into the Additional Charges window and the Total Due will be updated.

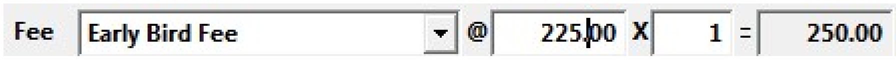
Other Fee Options

<u>Charging Multiple Course Fees to a Registration</u> - you can charge a registration multiple course fees by entering the number of fees to be charged in the Fee Number field (to the right of the X label):



When you tab out of the field, the *Course Fee Amount* will be multiplied by the *Fee Number* and the total will be entered in the Registration Fee Amount field:

<u>Assessing a Custom Course Fee</u> - for organizations using the *Allow Edit of Fee Amount on Registration* preference: you can assess a custom fee amount. Enabling this preference allows users to enter the custom amount in the *Course Fee Amount* field (to the right of the @ label):

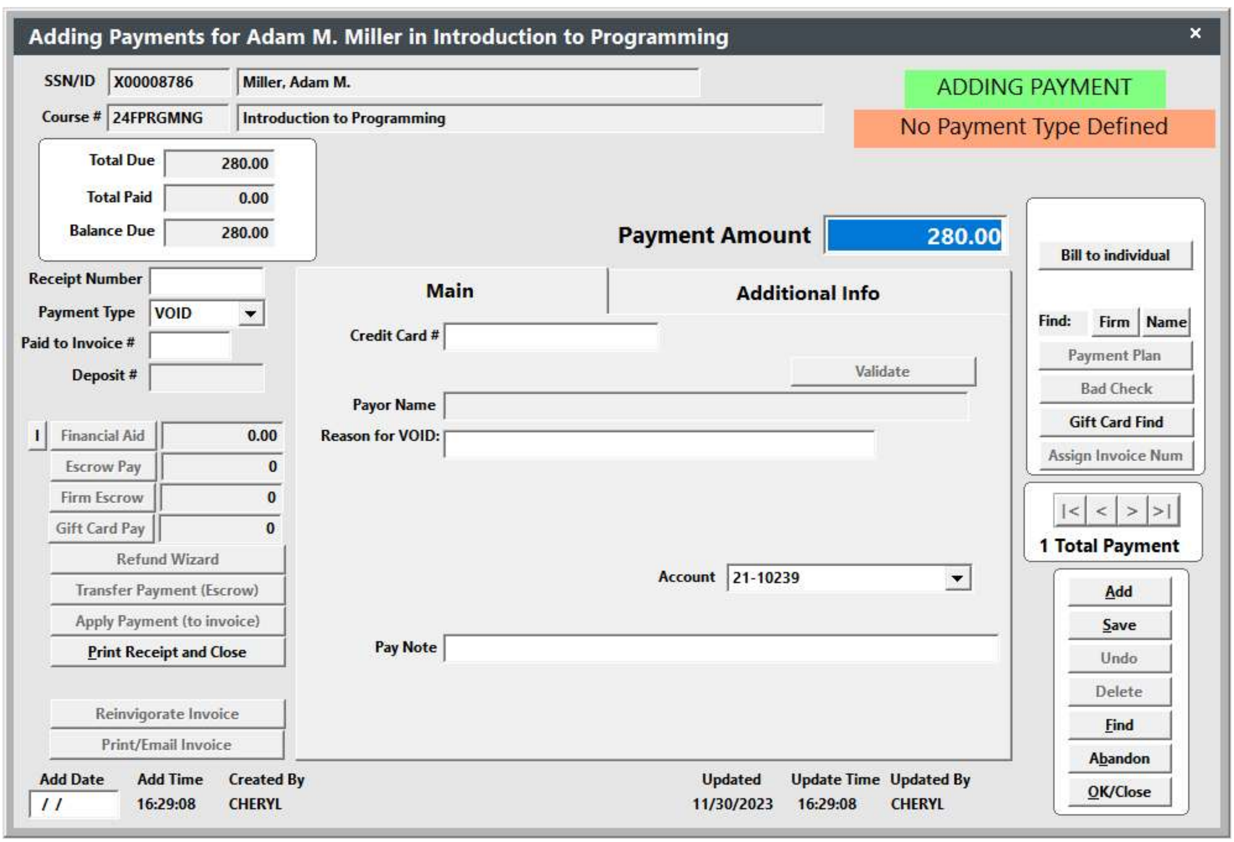


When you tab out of the *Course Fee Amount* field, the Registration Fee Amount (and Total Due) will be updated.

Making Payments

To make a payment:

1. Click the **PAYMENTS** button. This opens the **PAYMENT** screen with the total due automatically entered into the *Payment Amount* field.



2. Select the *Check* Payment Type. The Payment Detail fields now appear (note: which fields are available depends upon the payment type selected).
3. Enter the Check # *1234*.
4. Click the **PRINT RECEIPT AND CLOSE** button to open the **RECEIPT PRINTING OPTIONS** screen.
5. Select Default Report then click the **OK** button.

6. The receipt will open for you to preview before printing.
7. Close the **RECEIPT PREVIEW** window.
8. To print the report, select **YES** on the **SEND THIS REPORT TO THE PRINTER** window.

Once the report prints, the **PAYMENT** and **REGISTRATION** screens will close and you'll be returned to the screen you opened the Registration screen from (i.e. Names, Course, Search).

Note: you can also print a receipt from the Registration screen with the **PRINT RECEIPT** button. After printing the receipt, you are returned to the **REGISTRATION** screen.

Making Partial Payments to a Registration

You can make partial payments to a registration by entering the payment amount in the *Payment Amount* field before continuing the payment process (i.e. steps 2-8 above).

EXERCISE: add Adam into another course and make a partial payment.

1. Click the **ADD REGISTRATION** button.
2. Select *27SPRGMNG* from the Course list.
3. Click **NO** on the Grouping Registrations window (we'll talk about grouping later in this unit).
4. Click the **PAYMENTS** button to make a payment.
5. Enter *100.00* in the Payment Amount field.
6. Select *Cash* from the Payment Type list.
7. Click the **SAVE** button to save the payment.

Important Note About Partial Payments

When you click the **PAYMENTS** button you will **NOT** be placed in 'ADDING' mode because there is an existing payment record. Instead, you will be placed in 'EDITING' mode and will see the details of the payment you made earlier.

You CANNOT start entering the payment details or you will be CHANGING an existing payment record. You MUST click the **ADD** button to open a new payment record. You can then enter the amount in the Payment Amount field and continue with the payment process.

Creating Billings/Invoices

You can also create 'Billing' payments for the purpose of invoicing a customer.

EXERCISE: bill Adam for the remaining amount due for *27SPRGMNG*.

1. Click the **PAYMENTS** button.
2. Click the **ADD** button to add a new payment.
3. The remaining amount due is entered for you so you won't need to edit the amount field.
4. Select the *Billing* payment type. Note: by default, the bill will be directed to the person's Firm (in Payment Details) if there is a firm entered on the Name record. If no firm is entered, it will be directed to the individual.

5. Enter *12345679* in the PO # field.
6. Click the **SAVE** button to save the payment.

When you click the **SAVE** button, the payment record is created but no Receipt Number is assigned. This is because billing records are not actually payments and should not receive Receipt numbers. If you have Company Invoicing, you assign an Invoice Number when printing new invoices.

Payment Errors

Occasionally, you may find that there is an error on a payment record that cannot be corrected (e.g. a payment was accidentally made but the individual did not pay, the payment amount is wrong, etc.). In these cases, you have two options:

- Delete the payment - you may delete a payment--**IF**--it has not been assigned a receipt/invoice number yet (i.e. the Receipt Number field is blank).
- Void the payment - if the payment has been assigned a receipt/invoice number, you must void the payment instead.

EXERCISE: void a payment.

1. Open Adam's *26FPRGMNG* registration record.
2. Click the **PAYMENTS** button to open the **PAYMENT** screen.
3. Select *Void* from the Payment Type drop down menu.
4. Click **YES** on the **CHANGE PAYMENT TYPE** window.
5. Click **YES** on the **REMOVE CREDIT CARD NUMBER** window.
6. Enter a reason for voiding in the *Reason for VOID* field.
7. Click the **OK/CLOSE** button to save your changes and close the screen.

You should ALWAYS void payments if they have a receipt number assigned. This keeps the payment record so you can account for all receipt/invoice numbers with your auditors.

Void Receipt/Invoice Tool

Student Manager has a tool that allows you to void all payment records with the specified receipt or invoice number. This is an especially useful tool when you have more than one payment with the receipt/invoice number.

Exercise: run the Void Receipt/Invoice tool.

1. Select **Tools > Financial >Void Receipt/Invoice**.
2. Enter *C0000054* in the Receipt/Invoice # to Void field on the **VOID RECEIPT/INVOICE** screen.
3. Click the **PREVIEW** button to see the payment records that will be voided.
4. Press the Esc key to close the **PREVIEW** and return to the **VOID RECEIPT/INVOICE** screen.
5. Click the **CONTINUE** button to void the payment records.

Canceling Single Registration

How you cancel a single registration will depend on whether the registration has been paid or not.

Registrations that have NOT been Paid

To cancel a registration that has not been paid:

1. Look up Charles Havlicek's *26FACE101A* registration record.
2. Check the *Canceled* box in the upper-right of the **REGISTRATION** screen.
3. If the Quick Cancel Registration option is enabled on Registration Preferences, the system will clear out CEUS/HOURS/Credits and issue a fee adjustment to zero out the amount due.
4. If the registration has billing records, you'll be asked if you want to void them. Click **YES** to void the billing record, then add a reason for voiding the billing.

Registrations that have been Paid

If the registration is paid, use the Refund Wizard to cancel the registration and issue a refund:

1. Look up Jeff Brown's *25FACE010A* registration record.
2. Click the **PAYMENTS** button to open the **PAYMENTS** screen.
3. Click the **REFUND WIZARD** button to start the Refund Wizard.
4. Select the following options:
   a. Refund to *Payer*.
   b. *Total Amount Paid*.
   c. *Cancelation-Full Refund* description.
5. Click the **PROCESS** button.

The registration is canceled, the CEUs/Hours/Credits are zeroed out, the fee adjustment is applied, and the Total Due is reset to 0.00.

Refunding to Escrow

You can also refund the fees to an Escrow account. Refunding to Escrow creates a new registration record called **Escrow** and transfers the money to it. The money is held in the Escrow account until you apply it to another registration.

1. Look up Bobby Anderson's *25FACE102A* registration record.
2. Complete steps 1-5 of the Refund Wizard process, selecting Refund to *Escrow* in step 4a.

Applying the Credit to a Registration

1. Use a look up registration option to pull up Bobby' registrations (green screen).
2. Click the **ADD** button on the **REGISTRATION** screen.
3. Select the *26FPRGMNG* course from the course listing.
4. When you're returned to the **PAYMENTS** screen, click the **PAYMENTS** button.

5. Click the **OK** button on the **CREDIT ON FILE** window.
6. On the **PAYMENTS** screen, click the **ESCROW PAY** button.

Refunding Money without Canceling Registration

You can refund money without canceling the registration (e.g. in the case of an overpayment).

1. Look up Susan Kraft's 25*SACE010A* registration record.
2. Click the **PAYMENTS** button.
3. Click the **REFUND WIZARD** button.
4. Select the appropriate refund options: Refund to *Payer and Amount Overpaid*.
5. Click the **PROCESS** button. The refund is processed but the course is not canceled.

Cancel Course/Registrations Wizard

The Cancel Course Wizard will cancel a course, all registrations, and issue refunds to the students.

1. Select **Module > Courses > Cancel Course**.
2. Select *25SACE010D* from the course list.
3. The system will ask you to confirm the cancellation. Select the **YES – GET ON WITH IT** button.
4. Enter a reason for canceling (e.g. Low Enrollment).
5. If you have the Pocket Ledger module, the system asks if you want to clear Faculty and Pocket Ledger entries for the course. Select the appropriate option.
6. The **MASS CANCEL/REFUND OF REGISTRATIONS** window opens for you to select who to cancel/refund. Select the students who students who should be cancelled then click **DONE**.
7. The **CLASS LEVEL REFUND WIZARD** screen opens. Select the appropriate options.
8. If registrations have billings, you'll be asked to void them. Select the appropriate option.
9. You are now given the option to print a report. Select the appropriate report option.
10. Click the **OK** button to close the window and finish the Course Cancel Wizard.

Note: most of our payment gateways (i.e. Touchnet, Elavon) do not allow refunds through Student Manager. Currently PayPal is the only service that will allow you to refund through Student Manager. All others, you must process the refunds through the payment service site.

Transferring Registrations

You may transfer an individual to another class (registration)—or—transfer the registration (class) to another individual.

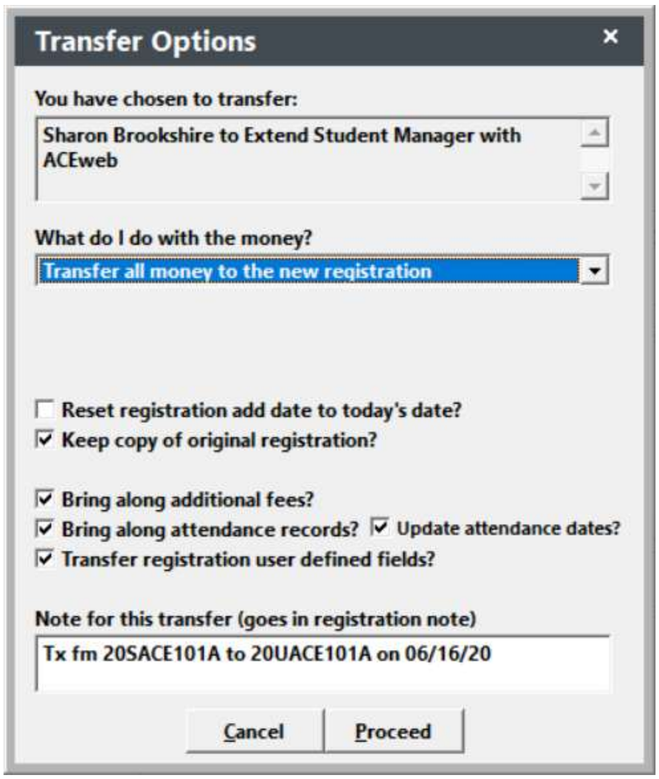
1. Look up Susan Kraft's *26SACE101A* registration record.
2. Click the **TRANSFER** button.
3. The **TRANSFER MODE** window opens for you to select the appropriate option.

a. Click the **CLASS** button to transfer the student to another course. Select the course then follow the Transfer Wizard instructions below.

b. Click the **STUDENT** button to transfer the registration to another individual. Select the individual to whom you want to transfer registration then follow the Transfer Wizard instructions below.

For this exercise, click the **CLASS** button.

4. Select *26UACE101A* from the course list.
5. The Transfer Wizard now opens.



6. Verify transfer information and select the appropriate Fee Transfer option (Transfer all money to the new registration, Hold back a transfer charge, Leave all money with the old registration).
7. Select the other options, i.e. Reset registration add date to today's date, Keep copy of original registration, Bring along additional fees?, etc.
8. A note is auto-entered about the transfer. You can edit or add to the note if desired.
9. Click the **PROCEED** button.

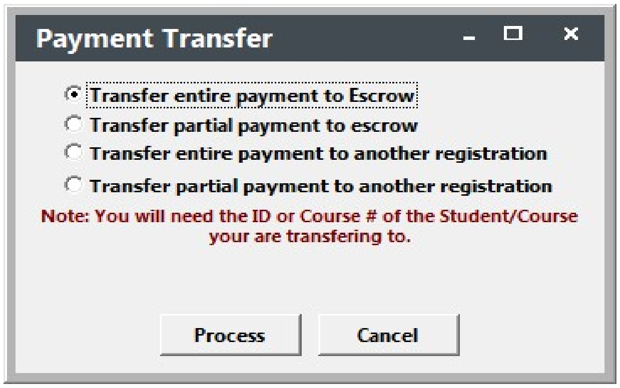
Transferring Payments

You can transfer a single payment to another registration or to Escrow.

1. Look up Susan Kraft's *25FFIN205A* registration record.
2. Click the **PAYMENTS** button to open the **PAYMENTS** screen.
3. Click the **TRANSFER PAYMENT (ESCROW)** button to start the Transfer Payment Wizard.

4. The Payment Transfer window opens for you to select the appropriate option:

   Note: if transferring a partial payment amount, you must also enter the amount to be transferred.



5. Select *Transfer entire payment to another registration*.
6. Click the **PROCESS** button.

   Notes:

   - If you are transferring the payment to Escrow, the payment is transferred, the Payment screen is closed and you are returned to the **REGISTRATION** screen.
   - If you are transferring the payment to another registration, you must select the appropriate registration from the list.
7. Select Susan's *26FFIN205A* registration from the list**.

The payment is now transferred.

**You can only look up registrations by SSN/ID # or course number. If you are transferring to another person, you will want to look up that person's SSN/ID # before you transfer the payment.

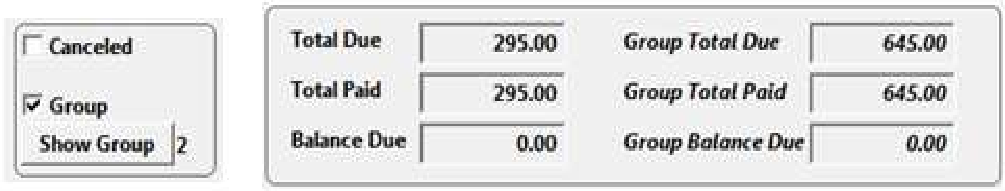
Grouping Registrations

The Grouping feature allows you to group any number of registrations together. You then make a single payment that the system automatically distributes among the registrations in the group. You can also print a single receipt that will show the payment detail for the grouped registrations.

EXERCISE: group registrations together.

1. Look up your name record.
2. Click the **ADD REGISTRATION** button.
3. Select the *26FPRGMNG* course.
4. When the **REGISTRATION** screen opens, click the **SAVE** button to save the registration.
5. Click the **ADD** button (on the **REGISTRATION** screen).
6. Select the *27SPRGMNG* course.
7. The system will ask you if you want to group the registrations. Click **YES**.

When you're returned to the **REGISTRATION** screen, you'll see the Group field is checked. You'll also see new information in the Totals Box (Group Total Due, Paid, and Balance).



Viewing Group Members

You can view the members of your group by clicking the **SHOW GROUP** button. This allows you to verify that you have grouped the correct records together before making a payment. You can also navigate between grouped members' registration records by highlighting the registration you want to view and pressing the <u>ENTER</u> key.

Making a Payment to the Group

You can now make one payment that will be distributed among the registrations in the group.

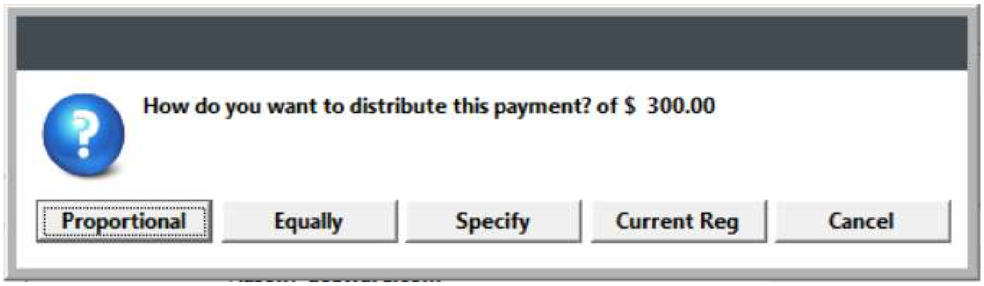
1. Click the **PAYMENTS** button. The total due for the group will be auto-entered into the Payment Amount field.
2. Enter the payment details (e.g. payment type, etc.).
3. Click the **OK/CLOSE** button to save the payment and close the **PAYMENTS** screen. When you save the payment, the system creates a payment record for each member of the group and assigns the same receipt number to all the payment records.
4. Click the **PRINT RECEIPT** button.
5. Click **OK** on the **RECEIPT PRINTING OPTIONS** screen. The receipt shows registration and payment detail for all group members.

Making Partial Payments to the Group

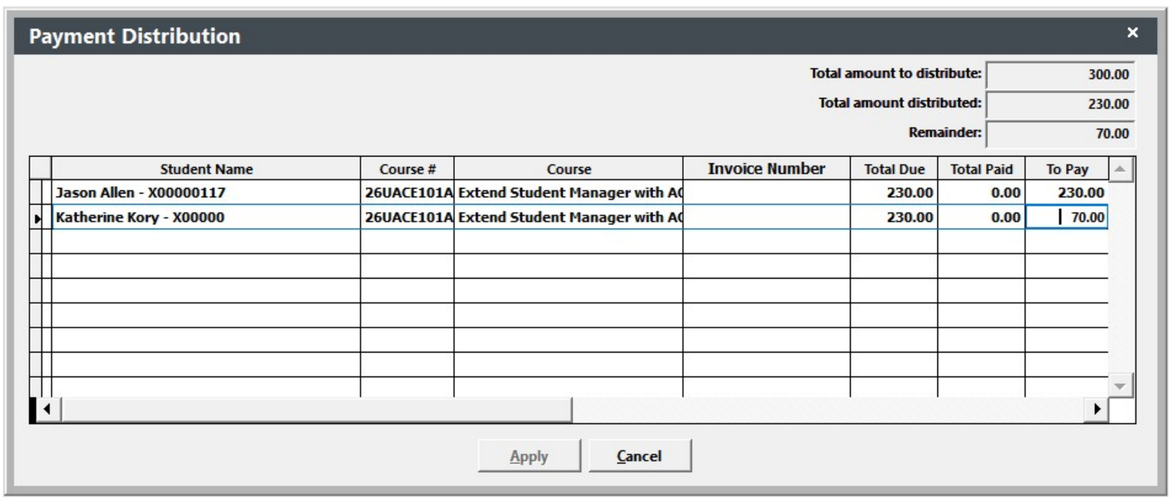
You may also make a partial payment to grouped registrations.

1. Look up Jason Allen's *26UACE101A* registration
2. Click the **PAYMENTS** button.
3. Enter 3*00.00* in the Payment Amount field.
4. Select the *Cash* payment type.
5. Click the **SAVE** button.

6. The system will ask you how you want to distribute the payment.



- Proportional - applies percentage of payment to each registration (e.g. 40% of total due is assessed to one registration, so 40% of payment is applied to that registration).
- Equally - applies an equal amount to each registration.
- Specify - allows you to determine how much to apply to each registration. Enter the amount you want to apply to each registration in the To Pay field. Then click the **APPLY** button.



7. Once you select your option, the system applies the partial payments to all registrations in the group.

Grouping Existing Registrations

You can group existing records together also (e.g. employees of a company register in courses that will be paid by the company with one check).

1. Look up Lindsey Lieberman's *26UACE101A* registration record.
2. Check the Group box.
3. You'll be asked if you want to link the registration with another group. Select **YES**.
4. Find and select Cheryl Scott's *26UACE101A* registration.
5. After you select the course, you'll be returned to the **REGISTRATION** screen.

Ungrouping Registrations

Sometimes you may need to remove a registration from a group. For example, ACEware recommends you ungroup a registration before issuing a refund or transferring a registration.

1. Look up Lindsey Lieberman's *26UACE101A* registration record.
2. When the **REGISTRATION** screen opens, uncheck the *Group* box.
3. Select *Remove this record from its current group*.

This removes the record from the group and the Group Totals information from the **REGISTRATION** screen. However, it does not alter any payments already made. If you made a payment before ungrouping, that payment will still exist with the originally assigned receipt number.

UNIT 5
RUNNING REPORTS

Unit Objectives

In this unit, you will learn to:

- Finding the Right Report
- Run Main Reports
- Run Queries
- Print Reports
- Set and Run Report Favorites
- Run Special Reports
- Reports without Queries
- Statistical Reports
- Output Reports in Other Formats

Student Manager provides over 200 predesigned report templates for you to view/print the information in your database.

Module Quick Reports

We've already seen some reports in the Quick Reports/Receipts areas:

- Course Quick Reports button – print rosters, name tags, mailing labels, certificates, course description, or faculty contracts for particular course.
- Names Quick Reports button– print fax cover, envelope, transcript, or letter for particular individual.
- Registration/Payment Print Receipt button – print a receipt or letter of credit for particular individual.

Quick reports give you data for the particular record you have open. For example, if you had the Master Course Record open to a specific course, the reports would display data for that course only.

Student Manager Report Menu (Command Bar Item)

Reports for a series of records (e.g. a series of courses) are run from the Reports menu. Reports are grouped according to the type of information contained in the report:

- Accounting – Cashbox, Daily Income, Income/Enrollment Summary, Income Detail by Registrant, Special 1 Reg/1 Line (Deadbeat)
- Demographics – Names data reports, Firm data reports, CRM reports, Mailing Labels
- Courses – Courses Details, CEU Reporting, Income Summary, Room Use, Waitilists, Catalog
- Registrations – Registrations with fees and payments, Optional Fee Counts, Receipts, Rosters, Transcripts, Name Tags, Certificates, and Tabletents
- Faculty – Contract Agreements, Instructor Lists, Performance Data, Check Requests, Faculty Only 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, Tracking Codes
- Codes – Student Manager Codes Listings

Most of the reports in these areas require you to run a query—a request for specific data to be displayed on the report you select.

Finding the Right Report

You must know the following information to find the right report:

1. What type of report you want to run, i.e. do you want to print mailing labels or a course roster?
2. What reporting area to access. Each report area contains specific information from the data tables, so you must know which area will give you the information you want. For example, to print course rosters you would choose the Reports > Registrations > Rosters reporting area. You would not choose a Faculty reporting area because registrant information is not available in the Faculty reporting areas.

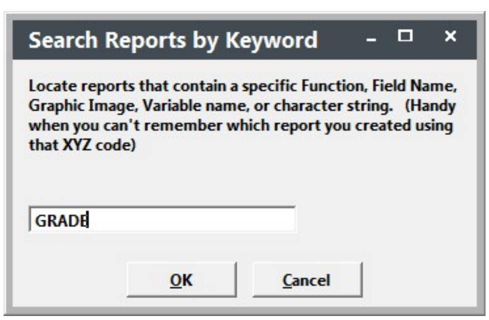
   The Report Area Guide (Appendix B) tells you what information is available in the various reporting areas. In addition, a map of the Report Menu is in Appendix D.
3. What records to include in the report. With most reports, you must run a query that tells the system which records to include in your report. For example, to print rosters for all courses beginning in the month of October, you would run a 'Courses Beginning between 2 dates' query and enter the date range. The system will search the data and return registrations for all courses beginning between the dates you entered.

Once you know this information, you're ready to run a report.

Searching for Reports

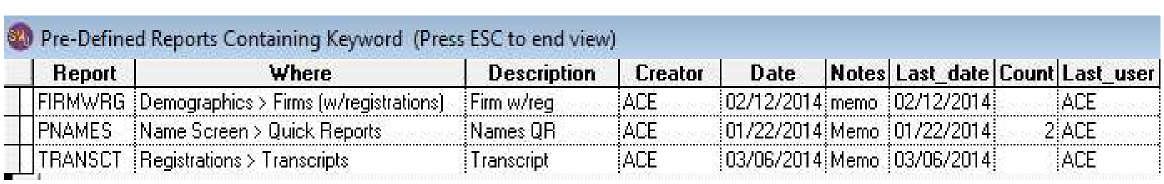
You can search for a report with the Search Report tool, which allows you to search reports by report title, field/variable name, function or character string.

1. Select **Tools > Reports > Search Report for Keyword**.
2. Enter your search string:



3. Click the **OK** button.

Student Manager will search all reports and give you a list of Master Reports and User Reports (separate lists) that contain the search string.



Pre-Defined Reports Containing Keyword (Press ESC to end view)

Report	Where	Description	Creator	Date	Notes	Last_date	Count	Last_user
FIRMWRG	Demographics > Firms (w/registrations)	Firm w/reg	ACE	02/12/2014	memo	02/12/2014		ACE
PNAMES	Name Screen > Quick Reports	Names QR	ACE	01/22/2014	Memo	01/22/2014	2	ACE
TRANSCT	Registrations > Transcripts	Transcript	ACE	03/06/2014	Memo	03/06/2014		ACE

EXERCISE: determine where to go to run a Name Roster report.

Running a Report

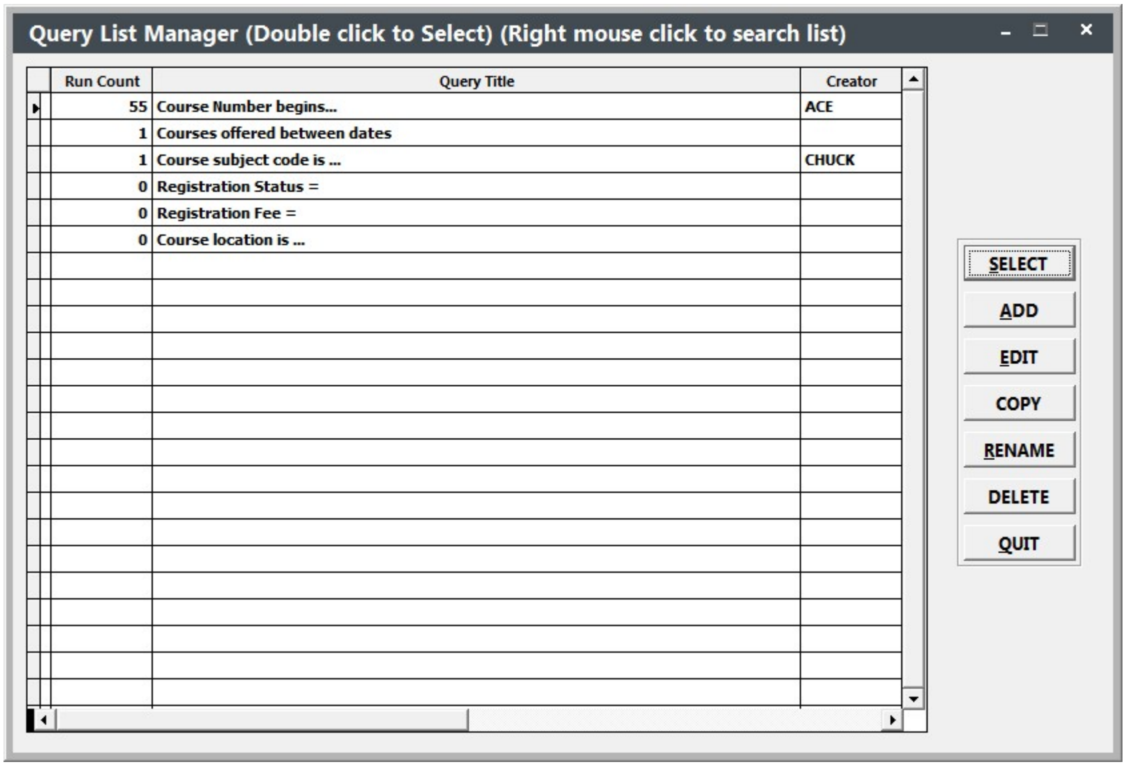
Select the appropriate report area from the Reports menu. When you select the report area, the **REPORT OPTIONS** screen opens. Here's a brief description of the available printing options. Note: listed options are not available in all report areas:

- Preview to screen – see an on-screen preview of the report before sending it to the printer.
- Export to file – export report data to an external file (i.e. Microsoft Excel, Text file, etc.).
- Print New Invoices (Invoices > Run Invoices Only) –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) –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, Registrations > Nametags) - allows you to print on a partially used label/name tag sheet. If checked, the system will ask you to specify on which label/name tag the system should 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).
- Show Waitlisted Registrations – include waitlisted registrations in your report.
- Include canceled records – include canceled records in your report.
- Include Third Party Billing Reggies – include registrations marked as billing records.
- Recycle Report Area – if checked, you'll be returned to the **REPORT OPTIONS** screen 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 file formats.
- Modify Report – check to modify the report.
- Default/Additional Report – select the report you want to run.
- Show User Reports – view the list of additional 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.

Once you select your printing options, click the **OK** button to continue.

Query List Manager

When you click **OK** on the **PRINTING OPTIONS** screen, the Query List Manager opens for you to run a query that selects the records you want to view on your report.

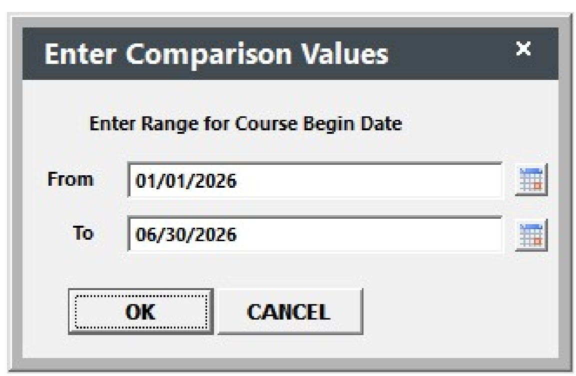


Query List Manager Elements

- Run Count - the Run Count indicates the number of times the query has been run. By default, queries are sorted by the Run Count so your most often used queries are always at the top.
- Query Title – this is a descriptive title telling the user what the query does.
- Query Buttons – buttons to run/manager queries. These buttons will be covered in Unit 6.

To run a query:

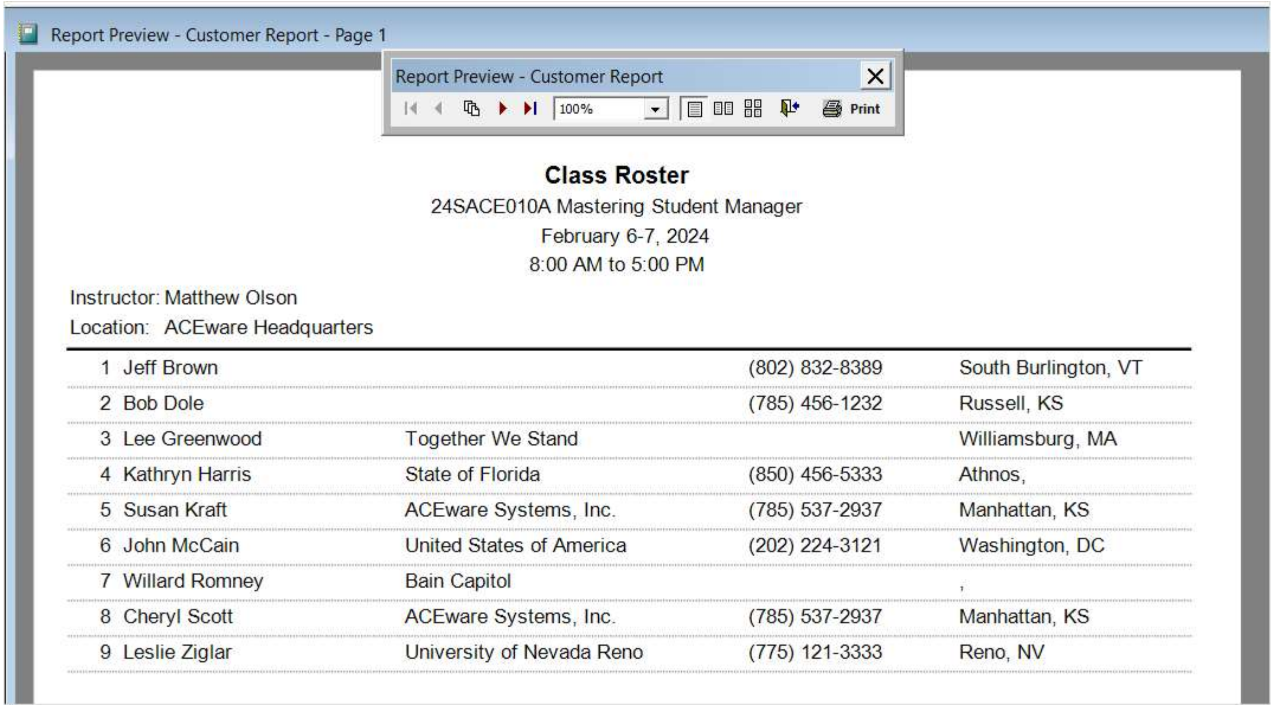
1. Highlight the query you want to run.
2. Click the **SELECT** button.
3. Enter your search value. For instance, if you select the *Courses offered between dates* query, you must enter the date range for courses you want included.
4. Click the **OK** button to continue.



EXERCISE: select the Course offered between two dates query and enter *01/01/2026* in the From field, and *06/30/2026* in the To field.

Print Preview Window

After the query runs, the Report **PRINT PREVIEW** window opens for you to view the report. Note: the **PRINT PREVIEW** window opens ONLY if you selected the *Preview to screen* option in the report's Printing Options.

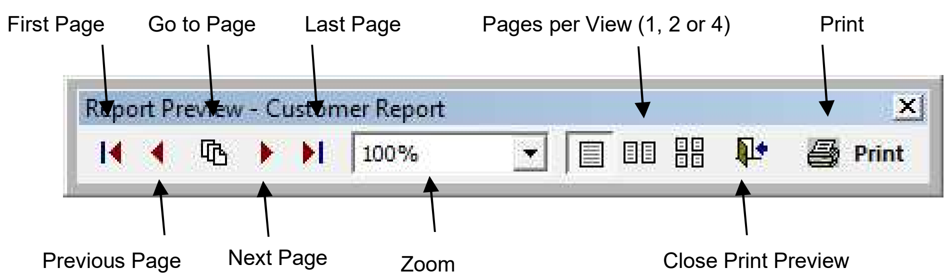


Class Roster
24SACE010A Mastering Student Manager
February 6-7, 2024
8:00 AM to 5:00 PM

Instructor: Matthew Olson
Location: ACEware Headquarters

1	Jeff Brown		(802) 832-8389	South Burlington, VT
2	Bob Dole		(785) 456-1232	Russell, KS
3	Lee Greenwood	Together We Stand		Williamsburg, MA
4	Kathryn Harris	State of Florida	(850) 456-5333	Athnos,
5	Susan Kraft	ACEware Systems, Inc.	(785) 537-2937	Manhattan, KS
6	John McCain	United States of America	(202) 224-3121	Washington, DC
7	Willard Romney	Bain Capitol		,
8	Cheryl Scott	ACEware Systems, Inc.	(785) 537-2937	Manhattan, KS
9	Leslie Ziglar	University of Nevada Reno	(775) 121-3333	Reno, NV

Use the Print Preview Toolbar to view pages of the report, zoom in or out, print the report or close the Report Preview Window.



Report Favorites

Student Manager users can identify up to 10 reports as Favorites so they can be easily found and run.

EXERCISE: run a favorite report.

1. Select **Reports > Favorites** or use the keyboard shortcut Ctrl+F1.
2. Click the **RUN REPORT** button next to the *Mailing Labels – Default* option.
3. Select the report options: Preview to Screen, Exclude "Don't Mail: names.
4. Click the **OK** button.
5. Enter *26SACE010A* into the *Course Number begins with* query box.
6. Click the **OK** button.

The mailing label report now runs.

EXERCISE: add a favorite report.

1. Select **Reports > Favorites** or use the keyboard shortcut Ctrl+F1.
2. For favorite # 6, click the **SET REPORT** button.
3. Select *Registrations* from the Area drop down list.
4. Select *Certificates* from the Sub Area drop down list.
5. Select *Default* from the Report Name drop down list.
6. Select *Courses End Date between two dates* from the Query drop down list.
7. Click the **DONE** button.
8. Click the **SAVE** button on the **FAVORITE REPORTS** window.

The report is saved to your Favorites list and can now be run.

Global Favorites

The Student Manager Administrator can also identify global report favorites that can be run by all users.

To run a global report favorite:

1. Select **Reports > Global Favorites**.
2. Click the **RUN REPORT** button next to the Name Roster option.
3. Click the OK button on the **REPORT OPTIONS** window.
4. Enter *26SACE010A* into the *Course Number begins with* query box.
5. Click the **OK** button.

The Name Roster report now runs.

Special Reports

There are several special-use reports that can be run from the main Student Manager screen:

- F2 Quick Counts – view or print enrollment counts for upcoming courses.
- Ctrl+F2 Quick Room Use - see what classes are meeting today.
- F3 Instructor Talent Search –search for instructors based on various criteria.
- F5 Person Locator - search for Name records based on various criteria.
- F7 Pay Grabber - search for Payment records based on various criteria.
- F9 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.
- Membership – for customers who have Membership programs. The Membership Retention Wizard returns student retention status, courses taken, or a list of students meeting specified membership criteria.
- Financial Aid – available with the Financial Aid module that allows you to track Financial Aid disbursements. The Financial Aid report returns information about student awards/draws.

Reports without Queries

Some reports don’t require you to select a query. For example, the Marked Label report. If you've checked the Label Flag on selected Name records, all you need to do is check the Print Marked Labels box on the Mailing Labels **REPORT OPTIONS** screen to run a report for the records.

EXERCISE: run the Marked Labels report.

1. Select **Reports > Demographics > Mailing Labels**.
2. Check the *Print Marked Labels* box on the **PRINTING OPTIONS** screen.
3. The system will now search for all records that have the Label box checked and include them in the report:

Note: the entry you entered in the Label Info field (i.e. *Brochure*) is displayed on the label as well so you know what to send the individual.

4. Close the **PRINT PREVIEW** window.
5. Click **NO** on the **SEND TO PRINTER** window.
6. The system will ask you if you want to clear the Label flag (i.e. uncheck the box on the Name records). Click the **YES** button.
7. Look up Adam’s record and verify that the Label Flag box is now un-checked.

Other reports that don’t access the regular Query List Manager are Cashbox, Print New Invoices, and Snap Shot.

Statistical Reports

Student Manager also offers various statistical report options:

Reports > Statistics > Course

- COURSE DATA SUMMARY - course statistics based on various criteria. E.g. a Department Summary report with how many courses per department, enrollment, income and expenses.

All Departments	Total Classes Number	Total Classes Percent	Enrolled	Income	Expenses	Net Income
Business	5	13.8%	20	$3537.50	$0.00	$3537.50
Information Systems	12	33.3%	51	$14980.00	$3590.00	$11390.00
Management	14	38.8%	60	$20177.00	$2440.50	$17736.50
Mathematics	3	8.3%	11	$2184.90	$0.00	$2184.90
Statistics	2	5.5%	5	$865.00	$0.00	$865.00
Totals	36		147	$41744.40	$0.00	$41744.40

- COURSE PERFORMANCE REVIEW - look at course performance based on income, enrollment, or CEUs or hours generated.

06/16/2020

Top Dog Report

List of your top 10 courses based on Income Generated (OWED)

COCRSE = "20S

Rank	Course	Begins	Course Income Due	Course Income Paid	Course Income Balance	Expense	Net	Enrolled	Generated CEUS	Generated Hours
1	20SSCA60871 Great Trains and Grand Canyon	03/08/2020	$4,740.00	$1,150.00	$3,590.00	$0.00	$1,150.00	2	0.00	0.00
2	20SACE010A Mastering Student Manager	01/22/2020	$3,475.00	$2,075.00	$1,400.00	$3,078.50	-1,003.50	10	16.00	160.00
3	20SWORD101A Introduction to Word Processing	01/23/2020	$3,150.00	$1,750.00	$1,400.00	$0.00	$1,750.00	9	12.00	120.00
4	20SACE010B Mastering Student Manager	03/04/2020	$2,800.00	$0.00	$2,800.00	$0.00	$0.00	8	14.40	144.00
5	20SART101A Art Appreciation	02/05/2020	$2,500.00	$250.00	$2,250.00	$0.00	$250.00	10	21.60	216.00
6	20SAPPDEVA Application Development Seminar	01/07/2020	$1,345.00	$1,345.00	$0.00	$0.00	$1,345.00	1	2.40	24.00
7	20SACE010C Mastering Student Manager	04/09/2020	$645.00	$0.00	$645.00	$0.00	$0.00	2	3.20	32.00
8	20SMGT500 Strategic Management Conference	08/03/2020	$595.00	$595.00	$0.00	$0.00	$595.00	1	2.40	24.00
9	20SACEPACK Student Manager Certificate	03/04/2020	$525.00	$0.00	$525.00	$0.00	$0.00	1	0.00	0.00
10	20SMGT101A Introduction to Management	01/30/2020	$525.00	$175.00	$350.00	$0.00	$175.00	3	3.60	36.00

Reports > Statistics > Names

- DEMOGRAPHIC SUMMARY - demographic statistics based on various criteria. E.g. look at the semester's breakdown of registrants by city.

	# of Names *(Nose Count)	%	**Total Registrations (from these names) Count	%	$ Paid	%	Average Course Fee
Fort Riley	1	2.8%	8	12.3%	$1380.00	10.8%	$172.50
Manhattan	10	28.5%	51	78.4%	$10374.50	81.2%	$203.42
Topeka	1	2.8%	6	9.2%	$1009.95	7.9%	$168.32
Totals		12	65		$12764.45		$196.37

- NAMES PERFORMANCE SORTING - find out individuals who were your biggest spenders, earned the most CEUs or hours, or took the most courses for a given period.

Rank	Name	City, ST Zip	Fees Paid	# Courses	CEUS	Hours
1	Michael Boyd	Manhattan KS 66502	$1,220.00	8	9.50	95.00
2	Kevin A Costner	Hollywood CA 99888	$2,009.95	8	10.00	100.00
3	Carol Anderson	McFarland KS 66501	$784.95	8	9.50	95.00
4	Monique M Fortmann	Topeka KS 66601	$824.95	8	11.20	112.00
5	William J Clinton	Chappaqua NY 10514	$455.00	7	7.50	75.00

Reports > Statistics > Tracking Codes

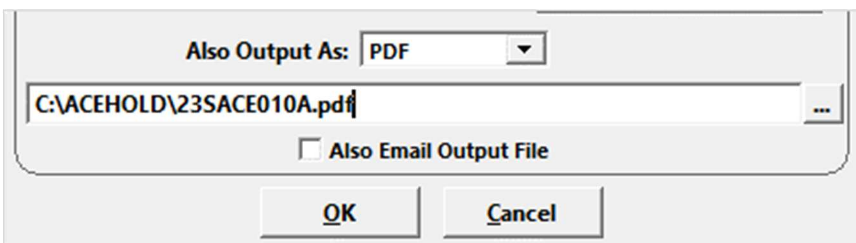
- TRACKING CODE REPORT - determine the success of your various advertising campaigns.

TRACK	Number of Registrations	%age of Total	Total Income	Promotion Cost	Return on Investment	# Broch Mailed	% Return (for Mailings)
NO CODE	8	22.2%	0	0	---		
No Code Identified	2	5.6%	195	1	195.0		
Bulletin Board	6	16.7%	350	75	4.7		
Cable Promo for New Classes	3	8.3%	295	750	0.4		
Mailing Winter 2000	3	8.3%	545	782	0.7	2,500	0.12
Newspaper Display Ad	4	11.1%	600	950	0.6		
Cable TV Info AD	3	8.3%	350	500	0.7		
Referred by friend	4	11.1%	754	1	754.1		
Referrals	3	8.3%	195	1	195.0		
Totals:	36		3,284				

Output Reports in Other Formats

You can also save your report in various formats. To do so:

1. Select the appropriate Report area (e.g. **Reports > Registrations > Rosters > Name Rosters**).
2. On the **PRINTING OPTIONS** screen, select the desired output format from the Output As drop-down:



3. Enter the path (location for the saved file)* and name for the file. You can enter it directly into the path field, or you may click the Ellipsis button to the right of the Path field and select the location and enter the file name.

   *We STRONGLY discourage saving files into your Student Manager directory. Instead, create a folder on your C:\ drive called ACEHOLD and save the Output files to this location.

4. Select any other appropriate printing options (e.g. Include Canceled Records, Additional Report, etc.), then click the **OK** button.
5. Select and run the appropriate query. If you selected Additional Report, select the appropriate report after running the query.
6. The file will now be created.

UNIT 6

MANAGING QUERIES

Unit Objectives

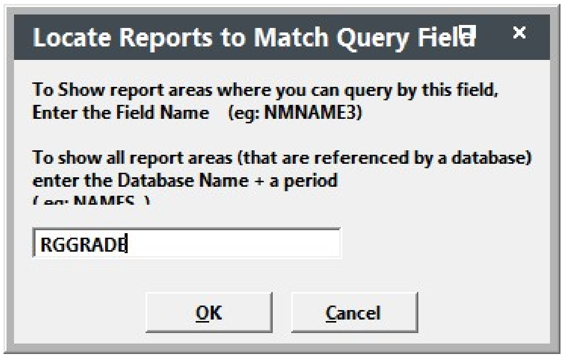
In this unit, you will learn to:

- Search for Queries
- Sort Queries
- Use Character Type Query Options
- Add Queries
- Edit Queries
- Rename Queries
- Copy Queries
- Delete Queries

Searching for Queries

At times, you may need to query by a certain field but you don't know what reporting areas will allow you to query by that field. To find out, you can search queries for the specific field. To do so:

1. Select **Tools > Reports > Search Queries for field**.
2. Enter the field name*.



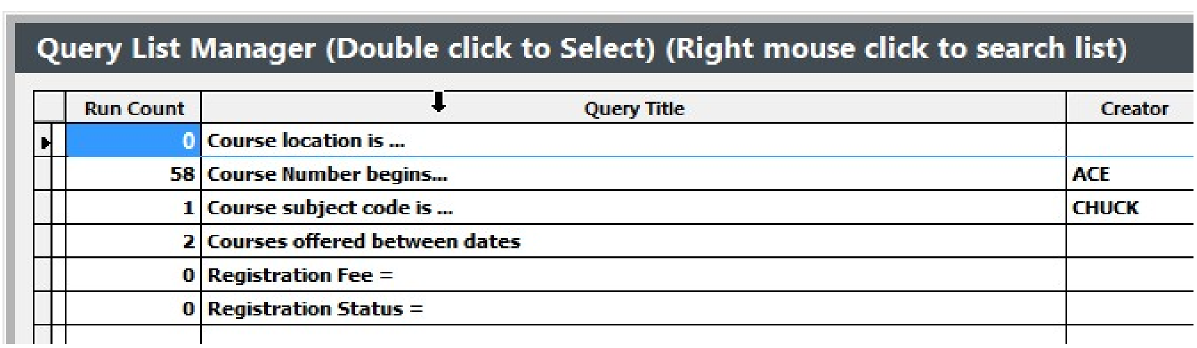
3. Click the **OK** button. The system will return a list of all reporting areas in which the specified field is available.

*If you don't know the field name, you can look it up in Online Help.

https://www.aceware.com/smhelp/Content/ScreenLayout.htm

Sorting Queries

By default, queries are sorted by the Run Count. To sort queries by Query Title, click on the Query Title Column Header (the gray bar named Query Title).



This will sort your queries in A-Z order. Other Sort options include:

- To sort queries in Z-A order, click the Query Title Column Header twice (i.e. the first time will sort them in A-Z order. The second time will sort them in Z-A order).
- To sort queries by Run Count, click the Run Count Column Header.

Character Type Queries

Queries that have Character type elements (e.g. Course Number begins, Subject Code is, etc.) offer users the ability to select a query item from the list of available field values. For instance, a Course Number Begins query allows you to select the course number from a list of all course records in your system.

The query item is selected by clicking the Ellipsis button (button with 3 dots [...]) to the right of the Query field. This opens the list of available values for the query element. Double-click a value in the list to select it and add it to the Query field.

Creating Queries

The most common queries are already created in Student Manager reporting areas. However, most organizations will need to create or modify queries to meet their specific needs. Here are some general rules to follow when creating queries:

- The field you want to use in your query must be available in the reporting area.
- You may create an unlimited amount of queries in each reporting area. Although, it is best to only maintain those queries that you most commonly use.
- Queries can only be used in the particular reporting area in which they were created.
- Unless you check the *Include Cancelled Records* box on the **PRINTING OPTIONS** screen, cancelled records will not be included in your report—no matter what you add to the query.

To create a new query:

1. Click the **ADD** button on the Query List Manager.
2. Enter a title for your new query (i.e. a descriptive name such as 'Courses between two dates').
3. After you enter the title, the **QUERY** window will open for you to add query elements.
4. Click the **ADD** button to add a query element.
5. On Step 1: Select a field, select the field from the list (e.g. for course number is between two dates, select Course Begin Date).
6. On Step 2: Pick Operator, select the comparison you want to make on the field (e.g. for courses between two dates, you would pick 'Between two dates').
7. On Step 3, enter Lower & Upper Dates. Most of the time you should select **ASK LATER**. This keeps the query as generic as possible so that it can be applied in a variety of ways.

Adding Additional Elements

Sometimes you want to add additional elements to the query. For example, you want to query on course dates and course number. You do this by simply pressing the **ADD** button again and selecting the connector you want between the two elements:

- **AND** means that BOTH items must be true for a record to be included in the result.
- **OR** means that if 'EITHER ONE' of the items is true it will be included.

After choosing the connector, repeat steps 5-7 (above).

Multiple Element Queries

You may occasionally need to create a query with a combination of elements. For example, you need courses between two dates except for courses which have "MGT" in the course code and are offered by a specific department.

Note: with multiple element queries, you must keep in mind is whether you want one, some, or all the conditions to be true:

- All conditions must be true - make certain you use the AND connector. This means that if any single condition is not met, the record is not included (e.g. the course must begin between the two dates, AND not include "MGT" in the course code, AND have a specific coordinator).
- One of the conditions must be true - use the OR connector. This means that if the record meets one of the conditions, it will be included (e.g. the course must begin between two dates, OR must not contain "MGT" in the course code, OR must have a specific coordinator).
- Combination of conditions must be true - you may need to use a combination of connectors along with the bracketing feature (see below) to govern how the query is analyzed.

Switching Element Connectors

If you used the wrong connector with a query element (e.g. **OR** instead of **AND**), you can switch the connector by clicking the **SWITCH** button, then clicking the element you want to change.

Moving Query Elements

You can also change the order of elements with the **MOVE** button. For instance, you added the element 'Course Number begins with or matches' as the third element but you realize it needs to be first. To move a query element:

1. Click the **MOVE** button.
2. Click the query element you want to move (e.g. Course Number begins with or matches).
3. Click where you want to move the query element (e.g. if you want it to be the first in the list, click the first query element)

The element moves to your chosen position--the other query elements will be shifted down.

Bracketing

Some queries cannot be reliably used unless elements are bracketed to determine the order of execution of the elements. Conditions inside the brackets will always be evaluated before any conditions outside of the brackets.

To insert brackets:

1. Click the **BRACKET** button.
2. Click the **INSERT** button.
3. Click the first condition you want included inside the brackets.
4. Click the second condition you want to include inside the brackets.

The selected elements will now be surrounded with parenthesis ().

Copying Queries

To copy an existing query, highlight it then click the **COPY** button. Give the copy a new name then click **OK**.

Editing Queries

To edit an existing query:

1. Highlight the query you want to edit.
2. Click the **EDIT** button.
3. The **QUERY** screen opens for you to make changes to the query elements.
4. To edit a query element, click the **EDIT** button on the **QUERY** screen.
5. Click the element you want to edit. Note: if there is only one element in your query, the system will skip this step and take you to step 6.
6. The **QUERY EDITING INSTRUCTIONS** window opens. After reading the instructions, click **OK** to close the window.
7. When editing query elements, the system starts with Step 3 of the Adding Query Element routine and works backwards through the steps.
   - If you need to edit Step 3: Enter Value only - make the necessary change and click the **OK** button. This will return you to the **QUERY** screen
   - If you need to edit Step 2: Pick Operator - click the **CANCEL** button. This returns you to Step 2. If the change you need to make is on Step 2 (i.e. change from 'Begins with' to 'Exactly Matches') you can make it now. The system will then move you forward to Step 3.
   - If you need to edit Step 1: Select a Field - click the **CANCEL** button on Step 3 then click 'Step Back' on Step 2. This will return you to step 1 where you can select a different field. Since you selected a new field, you must complete Steps 2 (pick the operator) and 3 (enter a comparison value) again.
8. After completing the steps, you'll be returned to the **QUERY** screen. Click the **OK** button to save your query changes.
9. You'll be returned to the **QUERY LIST MANAGER** window.

Renaming Queries

Query Names should be as descriptive as possible so that all users know what information the query will request from the data tables. If you edit a query, then you may need to rename it. To rename a query:

1. Highlight the query.
2. Click the **RENAME** button.
3. Make the appropriate changes to the name.
4. Click the **OK** button to save the new name and return to the **QUERY LIST MANAGER** window.

Deleting Queries

Part of your query management is to periodically delete old or unused queries. To delete a query:

1. Highlight the query you want to delete.
2. Click the **DELETE** button.
3. Confirm the delete procedure by clicking **YES** on the Confirmation dialog box.
4. The query is removed from the **QUERY LIST MANAGER** window.

UNIT 7

INTRODUCTION TO THE REPORT DESIGNER

Unit Objectives

In this unit, you will learn to:

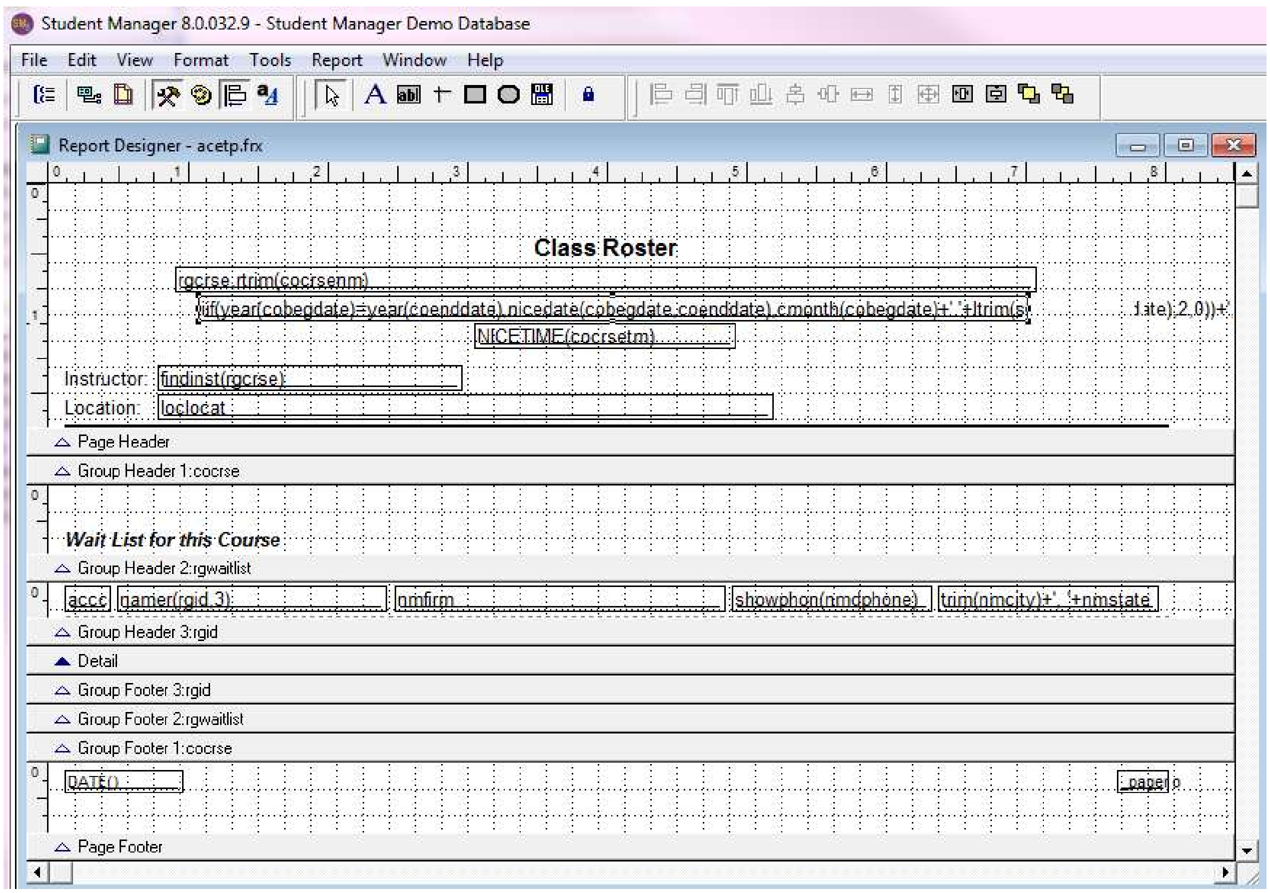
- Open the Report Designer
- Add report elements
- Set element format (color, font, etc.)
- Move report elements
- Align report elements
- Delete report elements
- Change Page Setup
- Save reports

Report Designer

The report templates included with Student Manager may or may not fulfill your organization's needs. That's why Student Manager also provides you with a full-featured report designer. With it, you can modify any existing report to fit your needs.

To modify a report:

1. Select your report (e.g. **Reports > Registrations > Rosters > Name Rosters**).
2. On the report's **PRINTING OPTIONS** screen, check the *Modify Report* box.
3. Select and run your query.
4. The **REPORT DESIGNER** now opens.



The report template consists of white spaces separated by gray horizontal bars called bands. The white space above each band contains the report elements that will display on the report (e.g. text entries, expressions, lines, etc.).

Before we begin discussing the report template, preview the report by selecting **File > Print Preview** (or use the shortcut Ctrl+I).

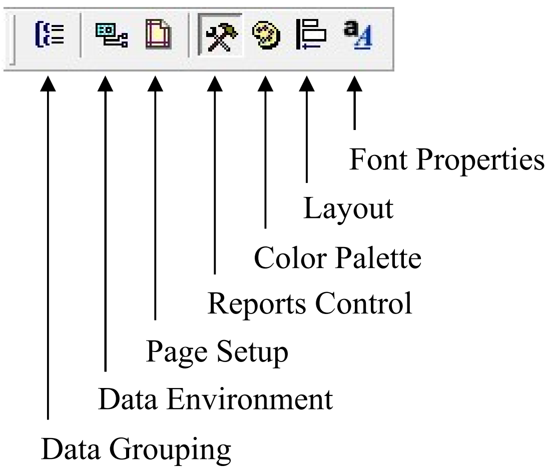
When you return to the report template, you'll begin to see the relationship between the gibberish on the template and the finished product. For instance, notice that the *Namer(rgid,3)* field box is located in the same area on the report template as the individual's name on the report preview.

Report Modification Tools

Student Manager's report designer provides you with several tools to help simplify your report modification.

Report Designer Toolbar

With the Report Designer Toolbar you can display dialog boxes and open report control toolbars.



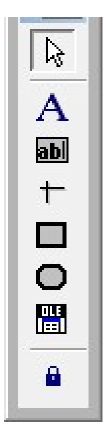
Tools Menu

Tools can also be accessed with the Report Designer Menu options:

- File – Close Report, Page Setup; and Print Preview.
- Edit – Cut, Copy, Paste, Select All, etc.
- Format - Alignment and Sizing options; Element Grouping and Order, Formatting options for text, lines, and boxes (e.g. color, font, line size, fill color and type).
- Report - Banding; Variables, Data Grouping; Set Default Font for Report.
- Window – Lists current report window.
- Help – Access Report Help.

Report Controls Toolbar

Use the Report Control Toolbar icons to add and modify report elements:



With the Select tool, you select report elements to modify or move.

The Label tool is used to create text entries up to 256 characters in length.

The Field tool is used to draw expression boxes in which to place data.

Draw vertical and horizontal lines with the Line Tool

Draw rectangular boxes on your report with the Rectangle tool.

Draw round-edged boxes with the Round Rectangle tool.

Draw a box for a picture with the Picture tool.

The Button Lock will keep the current tool selected for multiple additions.

Adding Text Elements

To add a text entry to your report:

1. Click the Label tool on the Report Controls Toolbar.
2. Click where you want to place the text. You'll see a blinking cursor where you clicked.
3. Begin typing your text.
4. Click out of the text box when you're finished.

Note: Each text box can hold 256 characters--that **includes** spaces, punctuation and hard returns.

Adding Lines

To add a line to your report:

1. Click the Line Tool on the Report Controls Toolbar.
2. Click and drag the line--either vertically or horizontally--to the length you want.
3. Release the mouse button to stop drawing the line.

Adding Boxes

To add a box to your report:

1. Click on the Rectangle tool or the Rounded Rectangle tool.
2. Click where you want to place the rectangle and draw a box.
3. Release the mouse button to stop drawing the box.

Adding Pictures

To use a picture in a report, such as your organization's logo, you must place it within the Student Manager folder first. Then follow these steps to link to the picture:

1. Click on the Picture tool on Report Controls Toolbar.
2. Click where you want to place the graphic and draw a box.
3. When you release the mouse button, the **REPORT PICTURE** window opens.
4. Click the Ellipsis button to the right of the File field to select the picture file.
5. Select the picture then click **OK**. This will return you to the **REPORT PICTURE** window.
6. You must now determine the picture sizing option:

- Clip Picture – If the picture is bigger than the box you created, shows a section of the picture. You cannot see the portion of the picture that extends beyond the box.
- Scale picture, retain shape (Recommended) - Displays the whole picture retaining the relative proportions of the picture. This will protect your picture from vertical or horizontal distortion.
- Scale picture, fill the frame - Display the whole picture, filling the box completely. If necessary, the picture will be distorted vertically or horizontally to fit the box.

7. Click the **OK** button to close the Report Picture box and return to the **REPORT DESIGNER**.

Adding Fields

There are two ways to add fields to your report:

Adding Fields from the Data Environment List**

When your run a report, the system creates a temporary file called a 'cursor' in which it places data from the records that match your query. To add one of the fields from the cursor to your report:

1. Click the Data Environment icon on the Report Designer Toolbar.
2. Scroll through the list of available fields to the field you want to include in your report.
3. 'Pick up' the field (with the mouse) and drag it to the report.

Adding Fields with an Expression Box**

You can also add fields to your report by creating an expression box and entering the field name into the Expression field. To create an expression box:

1. Click the Field tool on the Report Controls Toolbar.
2. Click where you want to place the expression and draw a box.
3. When you release the mouse button, the **REPORT EXPRESSION** window will open.
4. Type the field name into the Expression field.
5. Click the **OK** button to close the **REPORT EXPRESSION** window.

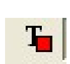
**If the field does not exist in the report cursor, you will receive an error message when you preview the report. In these cases, you must use a report function to add the field to your report if it is not in the report cursor (see Unit 8 for more information about report functions).

Changing Report Element Colors

You can change the color of reports elements. To change the color of an element:

1. Click the Color Palette icon on the Report Designer Toolbar to open the Color Palette.
2. Highlight the appropriate report element.
3. Click the appropriate icon on the Color Palette to set foreground/background color:

Background Color – set the background color of an element. Use this tool to set the fill color of boxes. Note: this is the default option when you open the Color Palette (will be ‘pressed’ down). If you don’t want to set the background color of an element, you must click it to de-select it (so it’s not ‘pressed’ down).



Foreground Color – set the foreground color of an element. Use this tool to set the font color, line color and border color of boxes.

If you don’t see the color you want on the Palette, click the **OTHER COLORS** button to open the **CUSTOM COLORS** window.

Changing the Font of Report Elements

To change the font of a report element, highlight the element then select **FORMAT > FONT** and make the appropriate changes.

Note: you can set the default font for all NEW elements added to the report from **REPORT > DEFAULT FONT**.

Setting Line Style

To set the line style:

1. Highlight the line.
2. Select **FORMAT > PEN**.
3. Select the appropriate option.

Setting Fill Type

To set the fill type of a box:

1. Highlight the box
2. Select **FORMAT > FILL**.
3. Select the appropriate fill type.

Note: when you set a fill color/type, you may need to send the box behind other elements or they won't be visible. To do so, click on the box then select **FORMAT > SEND TO BACK**.

Formatting Fields

You may need to apply special formatting to some fields so that they display properly. For instance, you may want a dollar sign in front of money, a SSN or a phone number formatted properly. To apply formatting to a field:

1. Double-click the field to open the **REPORT EXPRESSION** window
2. Click into the Format field and type the appropriate format*.

In the following formatting examples, 9s are entered as place holders, telling the system how many digits/characters to display. Note: you will also need to enter the @ sign and appropriate symbol ($ or R):

- <u>Currency</u> - @$ 999,999.99 (displays 6 digits of the amount and 2 digits of the cents with a comma at the thousand mark).
- <u>Phone Number</u> - @R (999) 999-9999 (places area code in parentheses and a dash between the exchange and number)
- <u>SSN</u> - @R 999-99-9999 (places dashes in number)

*You may also set the formatting on the Format window. To open it, click the Ellipsis [**…**] button to the right of the Format field. This window gives you formatting options for each field type (i.e. Character, Number, and Date). Select the appropriate option to see formatting options for the specific field type.

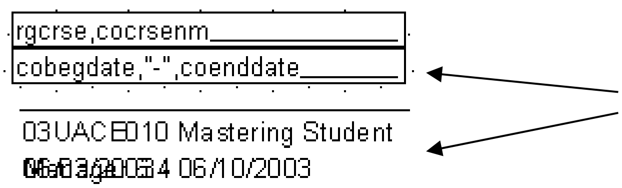
Stretch with Overflow

You have the option to let the contents of a field wrap to the next line if the expression box is not wide enough to display the entire field contents (e.g. a course title is longer than the box). To do so:

1. Double-click the field to open the **REPORT EXPRESSION** window.
2. Check the *Stretch with overflow* box.
3. Click the **OK** button to close the window.

Field Position

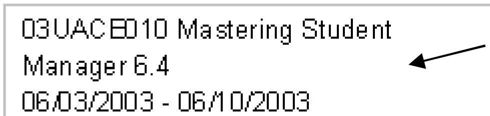
If you are using the 'Stretch with overflow' option (above) on a field, you may need to set the position of fields below it with the Field Position option. For example, if you set the course title to wrap to the next line but you have another field placed directly under it, the course title will print over the other field's contents if it wraps.



The cobegdate,'-',coenddate field is right under the rgcrse,cocrsenm field.

The wrapped Course Title prints over course dates.

To keep this from occurring, you must set any fields underneath your stretched field to "Float". Floated elements move down according to length of field information above it.



Cobegdate,'-',coenddate field is set to float. This allows the information to move down if the course title is wrapped to the next line.

Moving Report Elements

If you don't like where the report elements are presently located, you can move them. To move one item, pick up the element and drag it to where you want it. Or click on it to highlight it then use one of the Arrow keys to move it.

Selecting Multiple Elements

If you want to move more than one element at a time, highlight the elements in one of the following ways:

- Click on the first element. Hold down the Shift key while clicking on the other elements you want to move.
- With your mouse, draw a box around the elements you want to move.

Once they're highlighted, you can pick up and drag them to where you want them. Or use the Arrow keys to move them.

Resizing Report Elements

If you want to resize a report element (e.g. resize a field so it's wide enough to display the contents or resize a box), highlight it so you can access the adjustment handles, then grab the appropriate handle and drag it to expand or retract the element. Or, hold the Shift key down and use the appropriate Arrow key to resize the element.

Aligning Report Elements

After you have moved your elements, you may need to re-align them. To align elements:

1. Highlight the elements you want to align.
2. Click the Layout icon on the Report Designer Toolbar to open the Layout Toolbar.

Controls on the Layout Toolbar allow you to left, right, top, bottom, vertically or horizontally align elements. You can also vertically or horizontally center them, make them all the same height or width, and send them behind or in front of other elements.

Deleting Report Elements

If you want to remove an element from the template, just click on it then press the Delete key.

Page Setup

To add/edit columns within the report or change the page orientation (portrait vs landscape), select **File > Page Setup**. From here, you:

- Set the number of, width, and amount of space between columns
- Set the left margin
- Determine the print area
- Determine print order (if using columns)

To change the orientation of the page, click on the **PRINT SETUP** button. This will open the standard **WINDOWS PRINTING DIALOGUE** window where you can change the orientation, paper size, and default printer for the report.

Saving Changes

Once you have made all the report modifications, you're ready to save your changes:

1. Select **File > Close,** OR--Use the shortcut key: Ctrl + F4.
2. Click **YES** on the **SAVE CHANGES** window.
3. The **SAVING MODIFICATIONS** window will open next. If you modified a pre-defined report, you have these options.
   a. Saving your changed report as the pre-defined report: click the **SAVE AS DEFAULT** button. Next, you'll be given the option to replace the original pre-defined report or save the old report first. Select your desired option.
   b. Creating an additional report: enter a title in the *Report Title* field, then click **DONE**.

If you modified an additional report, the report will already be titled. You can:

a. Save the changes to the report by clicking the **DONE** button.
b. Create a new additional report. To do so, re-title the report, then click **DONE**.

TIP: when modifying or creating reports, write a short description about the changes in the *Report Notes* field. Writing notes reminds you what a report does (and lets others know too).

UNIT 8
ADVANCED REPORT WRITING

Unit Objectives

In this unit, you will learn to:

- Use report functions
- Write complex report expressions
- Add/Edit group bands
- Add print whens
- Create variables
- Use JustDoIts and JustAfters

Adding Functions to Reports

Functions are mini-programs that can access information not available in the report cursor, format information in a specific manner, or perform calculations on report data.

A function consists of a name followed by a set of parenthesis. Within the parenthesis, you enter parameters—these are pieces of data that the function needs to process/return information. Some functions require one parameter only, others require several. If you must enter more than one parameter, you separate them with a comma (,).

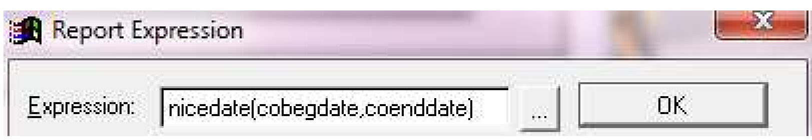
Take a look at these three simple functions to see examples of how a function should be written.

- **ADDCRSE** - returns a field from the Course table. You must pass it the course code field that is available in the report cursor (see Parameters: SSN/ID and Course Code below), and the name of the field you want to return in quotes.

  Example: ADDCRSE(cocrse,"codept”) returns the course department.

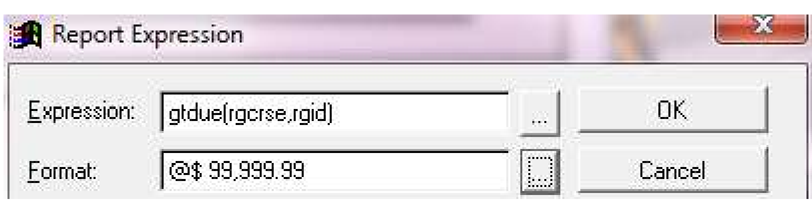
- **NICEDATE** – returns the date in text format. You must pass it the date field. You can also pass it a second date and it will give you the date range in text format.

  Example: NICEDATE(cobegdate,coenddate) returns course range of dates, e.g. December 1-5, 2026.



- **GTDUE** – returns total amount due for a registration. You must pass it the course code field and the name ID field.

  Example: GTDUE(rgcrse,rgid) returns the total amount due for an individual in a specific course, e.g. 250.00.



  Since this is a money field, we’ve also formatted it to display in currency format.

Parameters: SSN/ID and Course Code

Many functions require the individual’s SSN/ID and/or the course code. These fields exist in several databases and are named according to their respective database. For instance, the SSN/ID in the Names database is named NMID, in the Registration database it is named RGID. The course code is COCRSE in the Course database, RGCRSE in the Registration database.

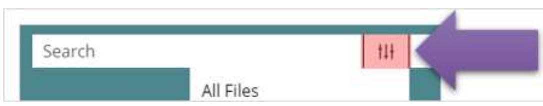
The report area determines which of the SSN/ID and course code fields are available in the cursor. For example, COCRSE is the available course code field in the Reports > Courses report area. But in the Reports > Registrations report area, RGCRSE is the available course code field.

In your functions, you may use whichever field is available in the report cursor. To see the list of available fields in your report cursor, click the Data Environment icon on the Report Designer Toolbar. Then you can scroll down the list of available fields to see which one is available.

Report Function Help

The Online Reference Guide lists all report functions available in Student Manager, their uses, required and optional parameters, and examples of function expressions. Access the Online Reference Guide at: aceware.com/smhelp/

To search for functions, select Reporting Functions from the Filter list.



Complex Expressions

Sometimes you will need to use more complex expressions to achieve the desired results. For instance, you may need to add a field to your report and format it. This can be accomplished in one report expression by combining functions.

Here are some examples of complex expressions:

- One function nested in another:

  NICEDATE(cobegdate,ADDCRSE(cocrse,”coenddate”))

  Adds coenddate to report then formats the course dates in text format.

- Several functions nested together in an IIF statement:

  IIF(EMPTY(nmname3),ADDNAME(rgid,"nmfirm"),NAMER(nmid,2))

  If the registrant's last name field is empty, then add the firm name to the report and display it, otherwise display the registrant’s name formatted with the NAMER function.

- Combining text elements and fields to create a paragraph in a confirmation letter:

  "The total cost for this course is $"+LTRIM(STR(due,8,2))+". We show that to date you have paid a total of $"+LTRIM(STR(paid,8,2))+". This leaves you a balance due of $"+LTRIM(STR(due-paid,8,2))

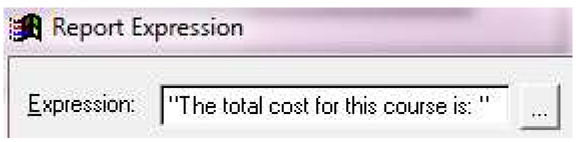
  Uses the STR function to convert the number fields due and paid to Text, and the LTRIM function to trim extra spaces from the left of the number fields. Then the text and fields are combined using the plus sign concantenator to form the paragraph.

Complex Expression Rules

When writing complex expressions, remember these rules:

1. Your expression cannot be longer than 256 characters (maximum number of characters the Expression field can hold). Don't forget that spaces, punctuation, etc. are counted as characters too and are therefore included in the maximum count (e.g. "The total cost for this course is:" = 38 characters even though the expression only contains 27 letters).
2. Every function MUST have an opening and a closing parenthesis.

3. Text elements must be enclosed in quotations (“”) in report expressions.



4. Fields in your expression must be the same type, or they must be converted to the same type using a report function such as Transform (i.e. number to character).

5. Combine elements in an expression using one of the following concatenators:
   a. Comma (,) - places a space between fields.

Returns:

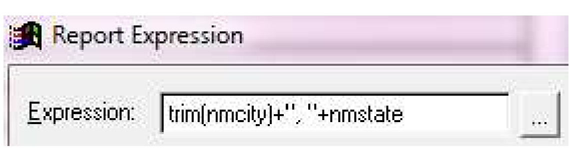
Chuck Havlicek

   b. Semi-colon (;) - places a carriage return between fields.

Returns:

President
ACEware Systems, Inc.

   c. Plus sign (+) - places nothing between elements.



Returns:

Manhattan, KS

Comparison Operators

The following Comparison Operators can be used in complex report expressions:

Numeric Comparison Operators

- = - Equal to specified expression (e.g. rgcrsefee=125.00 returns a registration if the registration fee is equal to 125.00).
- => - Equal to or Greater than specified expression (e.g. rgcrsefee => 125.00 returns a registration if the registration fee is greater than or equal to 125.00).
- <= - Lesser than or Equal to specified expression (e.g. rgcrsefee <= 125.00 returns a registration if the registration fee is lesser than or equal to 125.00).
- <> - Not equal to specified expression (e.g. rgcrsefee <> 125.00 returns a registration if the registration fee is not equal to 125.00).

Arithmetic Operators

- + - Addition
- - - Subtraction
- * - Multiplication
- / - Division

Character Comparison Operators

Note: character strings must be enclosed in quotation marks.

- = - Equal to specified expression (e.g. pytype='3' returns a payment if the payment type is 3 [Billing]).
- $ - Specified expression is contained in another expression:

  pytype $ '12456' returns a payment if the payment type is 1 [Cash], 2 [Check], 4 [Visa], 5 [Master Card], or 6 [Discover]

  'aceware.com' $ nmemail returns a name record if it has aceware.com in the email address

- <> - Not equal to specified expression (e.g. pytype <> '8' return a payment if the payment type is not 8 [Void]).

Logical Comparison Operators

- ! - Not equal to the specified expression (e.g. !rgcancel returns a registration if it is not canceled).

  Note: this operator can also be used with certain report functions. For instance, the Empty() function returns a value if the specified field is empty. !Empty() will return a value if the specified field is not empty.

Report Banding

The function of report bands is to give structure to the display of the report data. Some bands on a report template differentiate areas of the page layout (e.g. Title, Page Header). Other bands group records together in a hierarchical form. The following lists types of bands and their uses:

- Title - information that appears at the beginning of the report (e.g. title, introduction, cover page)
- Page Header - information that is printed at the top of each page in the report (e.g. date, report title, logo)
- Group Header - information that is printed at the beginning of each data group (e.g. course number and title, individual's name and address)
- Detail - information printed once for each record generated by the query (e.g. individuals registered in class, all individual's optional fees)
- Group Footer - information printed at the end of each data group (e.g. total enrolled in course, total amount due for each individual)
- Page Footer - information printed at the bottom of each page in the report (e.g. special notes or instructions, signature lines)
- Summary - information printed at the end of the report (e.g. summaries, conclusions, final totals)

Adding Group Bands

To add a Group Band to a report:

1. Click the Data Grouping icon on the Report Designer toolbar to open the Data Grouping window.
2. Click into the Group box and enter the field/expression on which to group (e.g. rgcrse, nmid, substr(nmzip,1,5) etc.).
3. Select the appropriate Group properties (e.g. start each group on a new page, reprint group header on each page, etc.).
4. Click the **OK** button to save the Group band and close the Data Grouping window. The group header and footer will be added to the report template.

Adding Title/Summary Bands

The Title and Summary Bands are optional bands that can be added to your report. To add the Title/Summary bands:

1. Select **Report > Title/Summary**.
2. Check the band you want to add to the report.
3. Select the paging option (i.e. if you want the title or summary band information to be displayed on its own page, select 'New Page').

Expanding/Contracting Bands

Bands can be resized. To adjust the amount of space in the band:

1. 'Pick up' the band with your mouse and drag it where you want it. OR--
2. Double-click the blue arrow on the band to open the band's properties window. Set the size you want the band to be in the 'Height' field.

Print Whens

You may determine when a field prints by setting a Print When. To do so, open the field's Report Expression window then click the Print When button.

- Print Repeated Values – 'Yes' allows the value to print repeatedly; 'No' prints the value only once per group.
- Also Print - 99.9% of the time you will leave these as they are.
- Remove Line if Blank - if you have fields on one line and all the fields have no values, the entire line will be removed--space and all.
- Print only when Expression is True – enter a condition the field must meet to be printed (e.g. only print if the field is not empty. You may use functions in your condition. For more information on functions, see the section 'Adding Functions to Reports'.

Adding Non-Printing Notes

You can also create non-printing notes on reports that are displayed in modify mode but don't print on the report (e.g. editing instructions). To do so:

1. Use the text tool to enter the desired note.
2. Double-click the text entry to open the **TEXT** Window; then click the **PRINT WHEN** button.
3. In the *Print only when expression is true* expression box, enter *.F.* (false).

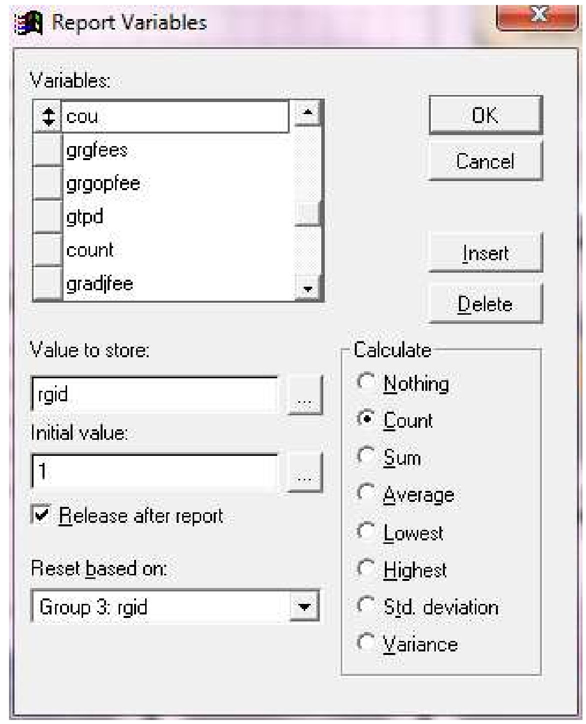
Creating and Using Variables

Variables are used to compare and manipulate data for display in a report. Variables are not saved to the database--their values are stored in the computer's memory while the report is running. After you exit the report, the variables are erased from memory.

You can use variables to:

- Generate record counts in a report (e.g. how many individuals took courses during a given semester).
- Generate numbered lists (e.g. 1. First person taking course, 2. Second person, etc.).
- Calculate values based on report data (e.g. add the payment amount to the total paid IF the pay type is Cash).
- Create shorthand representations of long expressions (e.g. variable Due represents the function gtdue(rgcrse,rgid) and variable Paid represents gtpaid(rgcrse,rgid)).
- Calculate values then use those values to calculate subsequent values (e.g. Due-Paid).

To create a variable, select **Report > Variables**. On this screen, you can add new variables, change or delete existing variables or change the order in which the variables are evaluated in a report. The Variable Definition dialog offers these options:



a. Variables: Name of the variable.

b. Value to store: Field/Expression which should be stored/calculated in this variable.

c. Initial value: Initial value of the variable BEFORE any calculations are performed

d. Release after report: Clears the report variable from memory after the report is printed. If not checked, the variable remains in memory until you exit Student Manager.

e. Reset at: Specifies the point at which the variable is reset to its initial value. End of Report is the default. Other options include End of Page, End of Column and groups you have created in the report.

f. Calculate: Specify a calculation that the variable performs. The variable begins calculating with its initial value, and continues until it is reset.

Variable Creation Notes

- Report variables are evaluated in the order that they appear in the list and can affect the value of expressions that use them. For example, if variable 1 is used to define the value of variable 2, variable 1 must appear before variable 2.
- If you use a variable in calculations, be sure that you initialize the variable with a non-zero value to avoid a division-by-zero error. If you don't specify a value, Visual FoxPro assigns a default value of 0.
- If you reorder the groups in your report, your report variables might not be resetting on the correct field. For example, if your report has two groups, the first grouping by country and the second grouping by date, and you switch the order of the groups, the variables still reset according to the original positions of the groups.

Calculations

Click the Calculate button to set field calculation options. The most common settings are the 'Count' and 'Sum' options. The other choices are unreliable at best. Even the count and sum can be tricky if improperly used. Calculations work best on reports where there is only one line of information in the report cursor per group (e.g. one line per course, one line per registration, etc.).

You may reset the calculations on any group band created in the report, at the end of each page, or at the end of the report. For example, if you have a field which calculates the total amount of optional fees per individual, you would reset every time the RGID field changes (sums optional fees for individual, then sets it to zero and resumes for next individual). .

Calculation Options

Nothing - No calculations are made on this variable.

Count - Counts the number of times a variable is printed per group, page, column, or report (depending on your selection in the Reset box). The calculation is based on the number of times the variable occurs, not on the variable's value.

Sum - Sums the variable values for a group, page, column, or report (depending on your selection in the Reset box).

Average - Computes the arithmetic mean (average) of the variable values within a group, page, column, or report (depending on your selection in the Reset box).

Lowest - Displays the lowest value that occurred in that variable for a group, page, column, or report (depending on your selection in the Reset box). Places in the variable the value of the first record in the group. When a lower value is encountered, the variable's value changes accordingly.

Highest - Displays the highest value that occurred in that variable for a group, page, column, or report (depending on your selection in the Reset box). Places in the variable the value of the first record in the group. When a higher value is encountered, the variable's value changes accordingly.

Std. Deviation - Returns the square root of the variance for the variable values within a group, page, column, or report (depending on your selection in the Reset box).

Variance - Measures the degree to which individual field values vary from the average of all values in the group, page, column, or report (depending on your Reset selection).

Special Functions

Some functions can only be used in a JUSTDOIT or a JUSTAFTER function. These are special functions that execute before or after a report runs.

JUSTDOIT

A JUSTDOIT is a specialized report function that uses SQL (Structured Query Language) to request and manipulate information from the data tables. With a JUSTDOIT, you can change the sort order of data in a report, filter out unwanted data, or execute specialized report functions. The JUSTDOIT executes the SQL commands BEFORE the report runs (before the data is displayed).

The JUSTDOIT application in Student Manager uses the SQL SELECT command and its elements to manipulate the data. The following table provides an explanation of each element of the SELECT command:

" ", ' ', [ ]	Delimiters used to enclose the Select statement and other elements in the JUSTDOIT.
select	Tells the system to select specific data from the cursor. Immediately followed by a statement telling the system what data to select.
* (asterisk)	Tells the system to select ALL data from the table that follows the FROM statement (see below).
as	Creates a field in the cursor and enters data you specify into the records (i.e. enter a static value or use a report function to get value)

0 as marker	Creates a field in the cursor and enters a zero (0) for every record in the cursor. This forces the JDI to run only once for a given report cursor (helps avoid circular logic problems).
from	Tells the system where to get the data that you are manipulating with the JUSTDOIT. In most cases it will be from Cursor5 (default cursor created when the report opens).
where	States a conditional clause that data must meet to be included in the report (e.g. where due-paid > 0.00).
group by	Groups data in the cursor by the field you specify, then removes all but one record for each group.
order by	Changes the sort order of data in the cursor. NOTE: conflicting report banding will cause unexpected results.
into cursor(cursor?)	Tells the system to place the data back into the cursor once it has finished executing all the select statements, making it available for the Report Print Preview.

The JUSTDOIT expression box may be placed anywhere on the report template but we recommend placing it in the header band of the report for purpose of quick identification. It's a non-printing element and will not display on the report itself.

JUSTDOIT Examples

- Change the Sort Order of Report with "Order By" Statement

  justdoit('select *,0 as marker from (cursor5) order by nmname3,nmname1 into cursor(cursor5)')

- Eliminating Duplicate records with the "Group By" Statement

  justdoit('select *,0 as marker from (cursor5) group by nmid,nmname3 into cursor(cursor5)')

- Filter the report with "Where" Statement

  justdoit('select *,0 as marker from (cursor5) where due-paid>0.00 into cursor(cursor5)')

- Add a field to the Cursor and then Sort by it

  justdoit('select *,addcrse(cocrse,"cobegdate") as date, 0 as marker from (cursor5) order by date into cursor(cursor5)')

JUSTDOIT Errors

- A common problem in JUSDOITs is mismatched delimiters Errors occur when you don't use matching ones, or when you try to use the same pair more than once.

  BAD: Mismatched Quotes are used to enclose the Select statement (double quote at the beginning and single quote at the end).

  JUSTDOIT("select *,0 as marker from (cursor5) where nmzip ='55401' into cursor (cursor5)')

  BAD: Same Quotes are used for the Select statement and the value in the Where statement.

  JUSTDOIT("select *,0 as marker from (cursor5) where nmzip ="55401" into cursor (cursor5)")

  Note: occasionally you may need to use a third set of delimiters in a JUSTDOIT. In these cases, you may use the square Brackets [].

- Another common problem is leaving out the 0 as Marker statement. Without the statement, the JUSTDOIT may execute a random number of times or become stuck in an infinite loop. No real damage done, but your report results will be unexpected and inconsistent.
- You cannot add a field to the cursor then attempt to do a comparison on the field contents in a Where statement. To accomplish this, you will need to add two JUSTDOITs to the report (see next section):

Using Multiple JUSTDOITs

You may occasionally find that you need to use more than one JUSTDOIT to accomplish your goal. For instance, if you want to add a field to the cursor then filter records based on the field contents.

To accomplish this, you will need to add two JUSTDOITs to the report. In the first one you add the field to the cursor. In the second one, you use the Where statement to filter the records:

justdoit(‘select *,addname(nmid,"nmocc") as Occupation from (cursor5) into cursor(cursor5)’)

justdoit('select *,0 as marker from (cursor5) where Occupation="MED" into cursor (cursor5)')

Notes:

When using more than one JUSTDOIT in a report, you only put the 0 as Marker statement in the last JUSTDOIT. If you place it in both JUSTDOITs, the second one will be ignored (it will not be executed).

Also, the JUSTDOITs must be added to the report in the correct order. For instance, if you add the Where Statement JUSTDOIT first and the Add Field one second, the system will execute the Where statement first because that was the one that was added to the report first, and you will receive an error because the field you are using in the Where statement doesn't exist yet.

Recycle Query Mode

If you are using the Recycle Query option and you run a report with a JUSTDOIT in it, you should leave the Recycle Query mode after running the report (i.e. click the EXIT button on the JUSTDOIT Warning window).

The reason for this is that the JUSDOIT changed the cursor and the changes will be applied to all subsequent reports you run in the area until you exit the Recycle Query mode.

JUSTAFTER

A JUSTAFTER is a specialized report function that allows you to stamp a value in a field, extract fields to an external file, or execute specialized report functions AFTER the report runs. Like the JUSTDOIT, the JUSTAFTER is a non-printing element that we recommend placing in the header band.

JUSTAFTER Examples

- JUSTAFTER('=CONFIRM()') stamps system date into Confirm field on the Registration screen. Use it to log the date confirmation letters were sent to registrants.
- JUSTAFTER('=NAMEEXP ("c:\myfile.dbf")') exports name and address information to a file called myfile.dbf on your hard drive (dBASE III format). This is most commonly used to create a mailing address file for Mailing Houses.
- JUSTAFTER('=DOEMAIL()') starts the Mass Email Wizard after the report runs. This is most commonly used to email everyone in a report (e.g. receipts, confirmation, second notices, etc.).

APPENDIX A: KEYBOARD SHORTCUTS

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 = Starts 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 (for recalling into a document, e.g. letter, email, etc.)

Ctrl+T = Copies all of the email addresses of students in the course, separated by semicolon, onto your clipboard (for pasting into an email client or document, etc.)

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

Screen Shortcuts Continued

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 B: REPORT AREA GUIDE

The following tables list the reporting area and the databases the report area accesses.

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
Credentials	Names, Nameudfs, Testing, Firms,
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 List ➢ 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 ➢ Snapshot	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
Firms Represented	Firm, Register
Tracking Codes	Names, Register
Course Data Summary	Courses
Course Performance Review	Courses

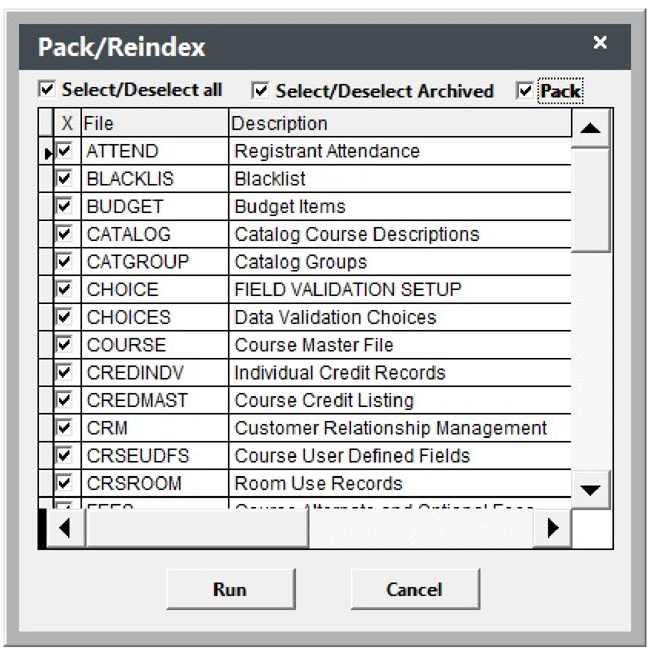
APPENDIX C: DATABASE MAINTENANCE

Pack/Reindex

At times you may need to rebuild the database indexes to insure optimal performance. You will also want to regularly remove the records that have been marked for deletion. To run the Pack/Reindex routine:

1. Confirm that all other users are logged out of Student Manager. To do this, select **Tools > Show Users**. The system will check for other users logged into the system and display the information for you:

2. Once you've confirmed that everyone else has logged out, select **Tools > Database Admin > Pack/Reindex**. This opens the **PACK/REINDEX** window.



While you may choose individual databases to reindex/pack by double-clicking them, most of the time you'll want to check 'Select All Files. If you also want to remove all records that have been marked for deletion, check 'Pack'. Then click the **RUN** button to start the process.

The length of time it takes to reindex/pack depends upon the number of records in your database, the network speed, and the speed of your machine.

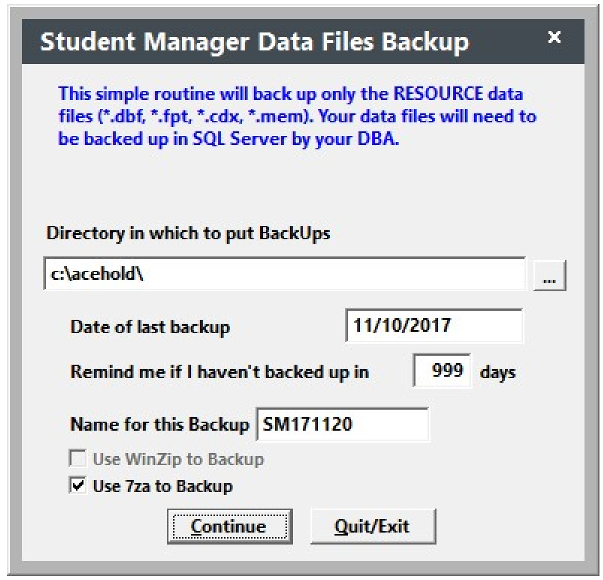
Note: if you are running the SQL version, you can only reindex some system tables.

Backing Up Student Manager Data

The Backup tool is only available with the VFP version (not available for the SQL version).

The loss of important data ranks as the greatest fear of most computer users. Recovery, if possible at all, can cost you precious time and money. Backing up your data regularly is vital insurance against such a "data catastrophe". And we've made it easy to backup your Student Manager data. Just follow these steps:

1. Get everyone else out of Student Manager.
2. Select **Tools > Backup Data**.
3. Enter the appropriate information then click the Continue button to start the backup procedure.



Note: if you are accessing Student Manager with a UNC path (UNC paths start with 2 slashes [e.g. \\ce\manager6\]. Mapped paths start with a drive letter [e.g. F:\manager6\]. To find out which type you are using, select **Help > About Student** Manager and look at the Data Path entry.), this routine will not work for you.

How Often Should You Backup Data?

The question to ask yourself is: how much data am I willing to recreate if my system crashes? If you're adding or modifying a great amount of records on a daily basis, then you will want to consider a daily backup. If you work with Student Manager less frequently, then you can consider backing up once or twice a week.

Backup Notes

- The Backup routine will NOT recognize paths with spaces in them, e.g. f:\Student Manager Backup\. Please back up to a folder with no spaces in the name, e.g. f:\ACEback\.
- The Backup routine will NOT recognize UNC paths, e.g. \\servername\backupfolder\. You must be running Student Manager from a mapped drive, e.g. f:\ACEback\, to use the built-in backup routine.
- The Backup routine will ONLY back up Student Manager data and log files. It will NOT backup images or files you have stored in the Student Manager folder (e.g. images you use on reports or files you are attaching to confirmation emails).
- We strongly encourage you to save your backup file to a location that is not on the Student Manager server. Or at the very least, to make a copy of the zip file after it's created and move it to a different server/machine. This ensures you have a backup of your data should the Student Manager server hard drive become corrupted or otherwise destroyed.

Combining Name Records

Despite your best efforts, you may find that two records exist for the same person (e.g. one with a computer generated ID and one with a SSN, or one with an correct SSN and one with an incorrect SSN). In these cases, you can combine the information and all associated registrations from both records into one. To combine two records:

1. Open the record you want to keep and write down the SSN/ID #.
2. Open the record you want to delete and replace the SSN/ID # with the SSN/ID # of the record you want to keep.
3. The system will ask you to confirm the SSN/ID # change. Click the **YES** button.
4. You'll be warned that the SSN/ID # has been assigned to someone else. Click the **COMBINE NAMES** button.
5. The system will ask you to confirm your intent to combine records. Click **CONTINUE**.

Duplicate Registrations

If the individual is enrolled in the same class under both names, you will not be able to combine the records until you delete the duplicate registration and associated payments.

Combining Records in Other Databases

You can also combine records in the following databases using the specified ID field:

- Faculty Records – use the Faculty System ID when combining records.
- Firm Records – use the Firm ID field when combining firm records.
- Location Records – use the Room Record Internal ID when combining records.
- Code Records – use the Code when combining records.

Updating Zip Codes

ACEware Systems, Inc. releases a Zip Code Update file yearly (usually in the summer). Full instructions to update your zip codes are in the Reference Guide in the Maintenance Tools section.

Updating Area Codes

ACEware Systems, Inc. also offers an Area Code Update Utility that allows you to update area codes on existing Name records. Full instructions to update area codes are in the Reference Guide in the Maintenance Tools section.

Upgrading Student Manager

ACEware Systems, Inc. frequently adds new features and makes them available to our customers through download from our Student Manager Resources web page:

https://www.aceware.com/customers/smresources.shtml

Deleting Additional Reports

You have the ability to delete Additional Reports that you don't use. To do so:

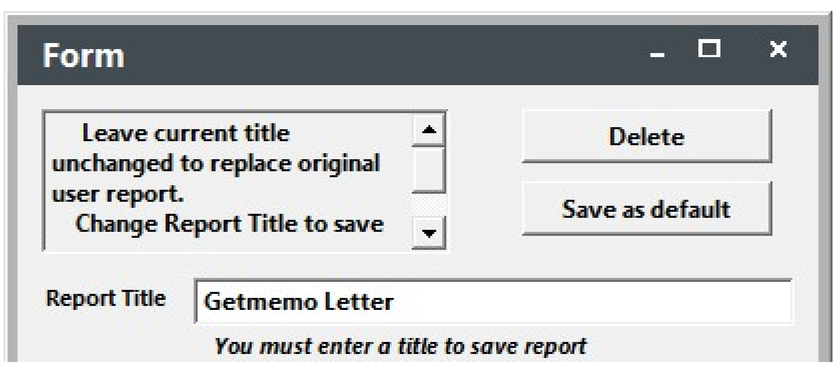
1. Select **Tools > Reports > Delete Additional Report**.
2. Select the Sort Option:
   - View-Natural Order – sorts reports by record number (e.g. newest reports at the bottom).
   - View-Name Order - sorts reports by Report Name (or Report Area).
3. The list of Additional Reports opens.
4. Check the box next to the report you want to delete.
5. Click the **DONE** button.

Deleting during Report Modification

You also have the ability to delete an additional report* when saving modifications to it. This is most useful if you've made a test report that you now want to delete. However, you can also use it to preview additional reports and delete those you don't want.

To delete a report while in Modification mode:

1. Close the **REPORT MODIFICATION** screen by selecting **File > Close** or by using the shortcut key: Ctrl+F4.
2. Click the **YES** button on the **SAVE CHANGES** window.
3. The Saving Modifications window opens. To delete the report, click the **DELETE** button.



4. Confirm the delete procedure by clicking the **YES** button on the Confirmation box.
5. Click the **DONE** button to close the Saving Modifications window.
6. The report is marked for deletion and will be removed when you Pack the system.

*You CANNOT delete a default report.

Training Evaluation

Please take a few minutes to give us feedback on your training session. Your comments are greatly appreciated and will be used in development of future training sessions.

Please check the box that most closely reflects your opinion on each evaluation item. If you select Disagree or Strongly Disagree, please clarify your response in the space provided.

Content

	Strongly Agree	Agree	Disagree	Strongly Disagree
Training guide was organized and easy to follow.				
Training objectives were relevant and useful.				
Adequate time was spent on each training objective.				
Objective exercises helped develop skills.				

Please clarify your answer(s), if necessary:

____

____

____

Instructor

	Strongly Agree	Agree	Disagree	Strongly Disagree
Identified and followed training objectives.				
Had a thorough knowledge of the subject matter.				
Was courteous and helpful.				
Encouraged/answered questions.				

Please clarify your answer(s), if necessary:

____

____

____

Overall

	Strongly Agree	Agree	Disagree	Strongly Disagree
The training session met my expectations.				
I will be able to apply the knowledge learned.				
I would recommend this training session to others.				

Please clarify your answer(s), if necessary:

____

____

____

Please see reverse side for Comments section. ➔

Comments

1. What was the most valuable aspect(s) of the training session?

2. What was the least valuable aspect(s) of the training session?

3. Were there topics/issues that you wished had been covered during the training session?

4. Are there other training sessions you would like to see ACEware offer in the future?

5. Additional Thoughts/Comments/Suggestions?

6. Optional:

Name: ____ Date: __________________

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www.aceware.com ● help.aceware.com

Resources

ACEware Website: www.aceware.com

Online Help: help.aceware.com

Student Manager Resources: aceware.com/customers/student-manager-downloads

ACEware Newsletter Archive: aceware.com/newsletters

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

Training Options: aceware.com/services/training