



101 Things you can do with Student Manager...

by
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The Student Manager and ACEweb software from ACEware Systems, Inc. offers a complete solution for programs that offer classes, courses, workshops and conferences. Though by no means all-inclusive, this list highlights key features and benefits. (For complete info about the entire ACEware product line, visit our web site at www.aceware.com)

- 1) **Time savings** - Enter data faster (add a name in 20 seconds, add registration, pay and print a receipt in 30 seconds), generate reports faster, and look up and edit existing data faster.
- 2) **Improvements in data quality** - With built-in data validation routines, easy access to code setup and update, it helps your data entry staff... so they enter accurate, valid data.
- 3) **One Time Data Entry** - With reference look ability on students, firms/vendors, and ability to clone (duplicate) courses, staff should never have to enter data twice (See item # 1).
- 4) **Flexibility** - You can collect as much (or as little) information as you like. Turn data fields on and off! You have complete control of what you choose to record and use.
- 5) **User Control** - There are over one hundred user definable options that you can set up to fit your situation. Turn features on and off with a mouse click!
- 6) **Built-in Mailing List, Contact Management, Broadcast Email and Marketing tracking tools** - With unlimited coding, manage multiple lists and track results of your promotions.
- 7) **24 hour a day support** - Our support program offers round the clock support—24-7, with REAL people answering the phone. 95% of calls receive an answer on the first call.
- 8) **Support staff who know the business and are committed to your success!** - Our staff has over 113 years of experience in the field of community and continuing education. ACEware staff go the extra mile to get you the answers you need, when you need them!
- 9) **Your own personal support representative** – You are assigned a specific support technician as your personal representative. They get to know you and your program and are better able to help advise you and help you when you have a problem.
- 10) **Flexible, extendable and powerful Report System** - integrated Report System has 84 different report categories, and is delivered with over 280 ready-to-run reports.
- 11) **An integrated Report Builder** - Built-in report writer allows an end user (a.k.a. a normal human being) to modify and create reports.
- 12) **Powerful Integrated Financial Reports** – We know you need the “bottom-line!” Our financials let you track income, expenses, per program, per department... and the integrated statistical analysis reports let you drill down to get the data you need to make tough calls.

- 13) **Over 200 report functions** – Functions that offer users an extensive tool box to help them format reports, organize data, and summarize information.
- 14) **Special extensions**– These extensions let (advanced) users add custom code to reports to extend their functionality (ability to provide for sophisticated sorting, and data selection routines, and ability to add automatic “batch data update” routines to reports.)
- 15) **Expandable, customizable, and affordable Software configurations** - With our no-penalty upgrade program, order the program that you need and can afford right now, then upgrade later to add additional modules and functions as your budget allows.
- 16) **On-going Upgrades and Enhancements** - - Our Research and Development staff talk daily with users, asking their opinions, and listening to their suggestions. That information becomes the basis for new features and updates for the software, to help it do more for you. Our user suggestion program encourages and rewards user feedback.
- 17) New in 7.2: **New Membership Management Support** (With special OLLI features) - - Our newly released 7.2 Version has several tools to help you manage a membership program. You may choose to set different membership expiration options, and can make membership a Pre-Requisite to enroll in a free class (OLLI folks.. are you listening??).

Special user tools like:

- 18) **F2** – Key (Quick Count) offers a pop-up listing of upcoming courses (NOTE: this tool may be accessed while the user is in the middle of some other task).
- 19) **Ctrl+F2** – Key (Quick Room Use) offers a pop-up listing of the class meeting dates, times, and locations for upcoming courses (NOTE: this tool may be accessed while the user is in the middle of some other task).
- 20) **F3** – Key (Faculty Talent Search) pops-up a form where the user can enter key faculty criteria (skills, subjects taught, biographical info) and get an instant list of faculty meeting that criteria (to find instructors who could teach particular courses).
- 21) **F5** – Key (Name Finder) Gives you “Google-ish” search options for people in the database. ...only know a first name, not a problem, only know the street NAME of a student, no problem... use Name Finder to seek them out.
- 22) **F7** – Key (Pay Grabber..) One of our recurring customer questions was: I need to find a payment where..... the F7 Pay Grabber key is to payments what the F5 key is to names.
- 23) **F9** – Special Dashboard Interface (pops-up a form where user can get a list of classes with low enrollment, classes that are close to full and a quick summary of registrations and income by day/week/month/quarter. (Perfect for Administrators and Managers).
- 24) **Ctrl+F9** (Quick list of Pay History) When viewing a student, registration, or payment record (data screen), pressing Ctrl+F9 displays a complete payment history for the student.
- 25) **ALT+3** – (pressed when viewing a name record) copies the complete name, address, phone # & email to your clipboard. To paste the complete name info into another document (an email, a word doc, etc) press Ctrl+V (paste).

- 26) **ALT+0 (zero)** – (pressed when viewing a name record) If you are editing a name record and need to over-ride the auto-complete feature (enter zip code and automatically fill in city and state), pressing ALT+0 will open up the City and State fields for manual editing (handy when entering international addresses).
- 27) **ALT+F1** – Repeats the last course code edited (from editing Course or Registration Record). Handy when running reports, and you want to search by last course you edited.
- 28) **ALT+F2** - in running queries, repeats the last character search value entered.
- 29) **Shift+F2** – Pastes today’s date into any data entry field.
- 30) **ALT+F3, ALT+F4, ALT+F5** – User definable text macro (store boilerplate text, string and recall it/paste it into a data field).

Integrated Special Function Modules offer extra benefits and payback to users

- 31) **Email Module** - lets you send registration confirmations (with option to attach files), mass mail participants in a class, set up sophisticated “merge emails”, and do traditional email blasts (under the control of your reporting system within Student Manager).
- 32) **Budget Builder Module** - Provides ability to “cost out” programs. Enter projected enrollments, projected fees, estimated expenses, and the tool calculates the go/no go number, break even point, and provides you the projected profit/loss at any given enrollment point.
- 33) **Pocket Ledger** - Tracks expenses for specific programs. Generates profit and loss reports.
- 34) **Catalog Builder** - Create a reference file of Course Data (Description, marketing info, and contact info). Lets you set pre-requisites, related and follow up courses.
- 35) **Workshop Tracker** - Track breakout sessions for a course or conference. Set maximum size limits on workshops, and optionally assign fees.
- 36) **Faculty Manager** - Tracks instructors, addresses, pay, and performance. A full featured address database for instructors, with special features like availability, skills searching, and pay preferences. You may set up instructor subject scoping and set automatic pay calculation (per hour, class, student, or session, and % of gross income).
- 37) **Company Invoicing Module** - Generate cumulative invoices (for one billing entity) for all charges to that entity for the time period you specify. When you receive a payment (for that invoice), make only ONE payment entry, and the pay will be distributed to all registrations on that invoice. Automatically generates invoices, can re-run old invoices, and has a 30-60-90 aging report.
- 38) **Integrated PCI Compliant Credit Card Processing** – We support over a dozen different payment gateways... including TouchNET, Authorize.Net, CashNet, Verisign, PayPal, NelNet..and many more.
- 39) **Extended Credit Module** - create an unlimited number of (varying levels) credits for any one class. The system allows you to define (at the person level) their ‘Preferred’ credits, and then only assign to the student, those credits which they are interested in.

- 40) **Correspondent Study Module** - process and manage independent study classes, track and log lessons, when received, when returned, and record lesson grades.
- 41) **CRM Module** - track all contacts you have with individuals interested and/or involved in your programs. Log all personal contacts and phone calls you have with individuals. Automatically log mailings and emails. Quick view of all contacts with an individual.
- 42) **Attendance Tracking Module** - track attendance on a day by day per class basis (tied to the class room use schedule). May record # of hours attended for the day, an absence code, and a daily score/grade!
- 43) **ACEweb On-line Registration Module** - A Data driven, flexible, customizable and full featured web course publishing and web registration portal that connects real-time, live to the Student Manager. It offers some outstanding benefits, including:
 - 40) Real-time Data Driven publishing (reads data from your Student Manager).
 - 41) Real time web registration. Students who enter their name and enroll via the web, are automatically entered into your Student Manager Database.
 - 42) Students can log in and view history of courses taken.
 - 43) Instructor Portal – view class lists and optionally send mass emails to class members.
 - 44) Several marketing tools, including “Tell a Friend” viral marketing, and an “Amazon” type ... if you like this class you might also like ...
 - 45) Administrative access via a web browser for system setup and an optional calendar format for publishing courses (a nice calendar view of your class schedule).
 - 46) Accounts Payable Access – Student can log in & pay off an outstanding account.
 - 47) User Modifiable email confirmations.

Includes Several Utility Tools (at no extra cost)

- 48) **Duplicate Name check and Duplicate Name merge/purge**
- 49) **Archive Feature** - allows off-loading old data to a folder to get it out of the way of current activities. With options to access the old data instantly and run reports.
- 50) **Data Conversion/Upload tools** - import mailing lists, also may do a “mass register”. Import a list of names and automatically enroll them into a specific course (great for contract training or workforce education)..
- 51) **Social Security Number transmogrify tool** - remove/replace SSNs in the database, yet maintain data integrity with registration history.
- 52) **Upgrade Wizard** - easy system upgrades. Simply run the wizard, and it prompts the user through the upgrade. A typical upgrade takes 5-15 minutes.
- 53) **Address Standardization Tools:** Self Serve web registration is nice, but when students type in their own data.. the formats/spelling/proper casing are pretty wild. ACEware has several special tools to help you clean things up.

Special integrated features that support Continuing Ed processes

.... **At the Course Level:**

- 54) Automatically seed a Course Subject code to Name Interest/Mailing list codes. (Whenever a student enrolls in a course with a specific subject code, that code is added to the student's interest code portfolio).
- 55) Integrated support for tracking and managing class waitlists.
- 56) On a course by course basis, set class maximums. System warns you when class is full.
- 57) A Mass Register tool, where you can enroll EVERYBODY (or if you choose, just selected students) from one class into a different class. This is great for sequenced classes, where most people in a level I class enroll in level II.
- 58) Create holiday dates (days when classes are NOT held) globally or location by location.
- 59) Reporting system provides tools to locate reports by keyword search (in case you forgot what you called it or where you put it).
- 60) Users can export a report (to share with other ACEware users), and can import reports from other ACEware customers.
- 61) Course management system supports "early bird fee" management (automatically hide early bird fees when the deadline passes). Also supports Membership based discount fees.
- 62) Course has Pop-Up warning feature that allows you to enter a message that pops up when someone enrolls (e.g. Note new class location or second class session is rescheduled).
- 63) Course has reminder date (user may put in a tickler date...and on that date the program reminds user of some needed action)
- 64) For each course, user may reference a document (supports hyper-link type access to a reference doc, a contract, a syllabus, etc.)
- 65) To speed up re-scheduling of classes, system has two "clone" modes. Allows "pasting" of data from an old course into a new data record.
- 66) Mass Cancel/Refund option allows you to cancel and refund all registrants in a class at once (i.e. if instructor has to cancel)
- 67) Mass Change/Update tool allows users to change status (active/inactive, etc.) of a group of classes at one time (avoids having to navigate to each individual course).
- 68) New in 7.2: Instant "Web Preview". When setting up a course, you may click once and get a preview of exactly how the class will look on the web.

.... At the Names Level

- 69) Names Add Mode has safety check to avoid duplicate name entry (checks Name, SSN/ID, and Email for matches/duplicates).
- 70) Name Call Back. Set a callback reminder for a student, and on that date the program reminds user of some needed action. You may also choose to "assign" a callback to some other staff member, i.e. I want Mike to call ??? on ??? date.
- 71) With one click, send an email to the student and automatically log the contact.

- 72) Unique catalog Fulfillment feature. Click the “Label Flag” field, and enter in the description box what you should send them. From the Reports/Demographic/Mailing label printing options screen, the “Print Marked Labels” option will automatically locate any Label Flag records, print them, and allow you to clear the Label Flag check.
- 73) A “Special Tool” button which let you perform several special functions (automatically stamp a date in the callback field, automatically stamp a date and your user name in the Name Comments Field, etc.)
- 74) Speaking of comments: if any data is entered in the Names Special Needs field, a pop-up message alerts the user (i.e. “Wheel chair bound”, “Spouse of the President”).
- 75) If your program offers special (discount) fees for particular groups of people (Staff, Senior Citizens, Students, ???), you can specify on the name record (Fee Category) what the “Fee Category” this student qualifies for. Then when this student enrolls in a course, if that fee category (“Staff”) is available for that course, the student will automatically be assigned that special fee (and of course, the registrar can always choose to over ride this).
- 76) Increase accuracy and save time with the zip code city, state, county, area code lookup. Enter the zip code, and the city, state, county, and area code are automatically filled in.
- 77) Firm Look-up. Once you enter a firm’s address, any subsequent registrants from that firm may have their address filled in automatically.
- 78) More on firms, when adding a firm, you can specify an alternate Billing Address for a firm
- 79) Firm Again! Also on firms, you can add a pop-up warning message to a firm (i.e. do Not allow any new Registrations, as the firm owes us BIG \$\$\$).
- 80) New in 7.2: In addition, you can create and assign a special discount fee category to a firm (and all employees of that firm will “inherit” the discount). This lets you promote Firm Participation.
- 81) Unique “Clone Name” feature. If you are adding several people from the same household or firm, on the 2nd, 3rd, ... names, press ALT+W and you can “Paste” in the address from the last name record you added/edited.
- 82) Dashboard Display (lower portion of name screen) shows you any outstanding balance owed, and the # of classes taken
- 83) On the name record, you can define up to 30 user data fields (many of which may be validated)
- 84) New in 7.2: Document Tracking. Now you can reference an UNLIMITED number of documents for a particular person (pdf’s of a Resume, an application, a transcript, etc.)

.... At the Registration Level

- 85) Allows “shopping cart” grouping of registrations. Lets you pay for a group of registrations (one name many courses; many names one course; many names many courses) in one pass.
- 86) Has several quick reference tools to help the registrar (show other students in the class, show class description, edit name record, view “mother” course record, show location, etc.)

- 87) Provides one button, two click option for transferring a registration (and payment) from one person to another, or from one course to another.
- 88) May add “fees on the fly”, or ad hoc discounts to a registration.
- 89) For mass entry of large groups (i.e. registering a list of participants for contract class), there is a special “Speed Entry” mode that lets you set up a class and add names with one click.
- 90) At the payment side, you can split/parse/join/divide payments any way you wish.
- 91) For billings, you can instantly create a “billing plan” to split a bill across several months.
- 92) Payments may be transferred between / across / among registrations
- 93) For Refunds, a Wizard guides you through the process (typically three steps and done!).
- 94) Integrated escrow system allows you to refund money to a student’s escrow account, for them to use later, letting you to avoid the cost and hassle of processing refunds.
- 95) New in 7.2: Can track the “approving supervisor” or “boss” or “sender”, and use that in your marketing.

.... And other goodies

- 96) Instructor Call Back. Set a callback reminder for an instructor, and on that date the program reminds user of some needed action
- 97) Special Statistical Reporting Section: Help you analyze your program’s data, instantly.
- 98) Utilities under the Tool section allow you to clean up data (i.e. combine and merge duplicate firm names, location references, and course descriptions)
- 99) The User Access control system lets the system administrator control access to the system. You can specify who gets to go where, and who has access to what.
- 100) A New Report Management System, which lets you activate/deactivate reports, and easily delete unneeded reports and rename reports.
- 101) A customer listserv – open to all customers with a paid up support agreement – provides a forum for discussion, sharing tips, getting advice, sharing resources, and connecting with other CE professionals

.... And perhaps the best of all (your 102nd reason we always give you MORE than you expect....)

- 102) Annual ACEware User’s Conference(s) that bring together customers from across the world to share tips, tricks, and techniques for using ACEware Systems software to help manage continuing ed programs. This year, we’ll convene our 15th annual User’s Conference in Las Vegas, May 4-6, 2011 (See our website for more info.)

To learn more about ACEware Systems and the Student Manager registration package, contact ACEware Systems, Inc at 800-925-2493 or go on line at www.aceware.com to download a free evaluation copy.