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Introduction – Welcome to ANCOR

ANCOR users are encouraged to take training courses a minimum of two times during these training periods. As departments “go live” it is anticipated that these training have prepared individuals with the requisite skill base to perform all anticipated job functions without incident.

Training sessions, which include working in a live "sand box" environment, are held at the Public Safety Building (55 Commercial Ave - 2nd Floor Computer Room) as well as alternate locations.

The following pages contain an overview of the main features of ANCOR. Additional trainings covering more advanced ANCOR features will be available in 2011/2012. Please click on the “Register for Training” green button on the ANCOR web site (<http://ancor.rutgers.edu>) to see when and where courses are offered.

Please consult with Debra L. Niece, Assistant Director of Enrollment Services for Non-Credit Programs for any system issues. She is available via e-mail at: dniece@docs.rutgers.edu

ANCOR Training Course Descriptions:

Creation of Courses and Student Registration

This course introduces the administrator on ways to develop and manage web registration course details including scheduling, unique and variable fees, discounts, descriptions, locations, instructors, and textbooks. It also explores the various search methods to locate information within the system, which include searching by course code or sections, adding new student records, tracking enrollment, registering students in one or multiple classes, and generating class rosters.

Exploring Financials & Reports in ANCOR

This course combines course material that covers both the financial and report elements in ANCOR. Additionally, users are provided with a brief overview of ScholarChip. A user-friendly exploration of ANCOR's accounting features. ANCOR users are provided with a brief overview of the functions of ScholarChip. Users also learn how to generate a wide variety of reports including those associated with course attendance and enrollment, and student-centered information including registrations, schedules, and demographics. Financial reports like profit/loss, receivables, and balance due statements are highlighted. Marketing features including generating brochures and statistics are available in ANCOR.

Advanced Features and Functions in ANCOR

This course is for ANCOR users who wish to expand their familiarity with the myriad of functionalities available in ANCOR. Topics include: Discounts, Profit/Loss, Classifications, Program Groups, and Running of Certificates

ANCOR works best when used with:

Browser Compatibility: Mozilla Firefox – Version 1 and above and Microsoft Internet Explorer – Version 7.0 and above

NOTE: If you do not see a pop-up screen – chances are that it is layered right behind the other screen you are viewing. Hit F10 on a MAC and the screen will come to the front.

PART ONE

Client Web Registration: Using Online Registration

How The Student (Client) Experiences the Online Course Selection/Registration Process

Home Page Screen Components: Home, Login, My Account, and Course Search

Note: The ANCOR system uses the word “client” for student.

HOME PAGE - <http://noncredit.rutgers.edu>

This is what your prospective client will see when beginning their educational journey. This page mirrors the existing information available to current clients. The left side contains live links to continuing education program units.

LOGIN – Located on Upper Right

This page allows an existing registrant to login or a new registrant to create his/her profile via pop-up screens.

MY ACCOUNT - Located on Left Hand Side of Screen

Contains a drop-down menu that includes:

MyAccount Home – Lists current registrations and latest news from RU.

Edit Profile/Password - Registrant Profile page. A new registrant enters his/her personal information on this page, while a returning registrant can edit this information if it has changed.

Manage Members - Family members or organizations can group registrants in this module. A new member – such as a family member – can be added from this screen by clicking on ADD NEW MEMBER.

Print Reports - Print student registrations.

Registrations - View confirmed registrations.

View Cart - The registrant will see every course he/she has added to his/her cart. One can remove courses, search more, or start the checkout process at this point.

Note: ANCOR checks for duplicate registrant records and notifies the potential registrant that a record already exists.

COURSE SEARCH - Located on Left

Hit the tab entitled “Course Search”

You are now viewing an actual working model of the standard version of the ANCOR Web Registration Module. This module is currently 100% active and connected to the live data of our ANCOR demonstration site.

Clients can search for courses by various search fields:

Keyword, Unit/Branch, Day of Week and Start Dates

Use one or more of the Course Search options to search for upcoming courses:

The **Keyword** field searches by: course codes, titles, descriptions, and instructor names.

EXAMPLE:

Course Search Options: Using a Keyword – Training

After inputting a keyword search a new screen appears listing search results. These results include information such as:

SEARCH RESULTS

Title/Facility	Session	Dates	Times	Days	Fee	Status
Financials In ANCOR	June	6/07/11	9:00 AM	M	0	Registration Available
Computer Lab	6/07/11	12:00 PM				

COURSE DETAILS –

Once a client selects a course by clicking on the link in the Title/Facility or Status fields, a new screen COURSE DETAILS appears indicating the specifics for that particular selection.

The registrant now sees the full course details and description.

Students will have the ability to purchase courses in different units. Revenue will be allocated to the appropriate General Ledger (GL).

Notice that in the location field is a link to a map that makes it very easy for your clients to know exactly where your courses are. You enter the map URL for your sites and they will display here as links directly to maps. To add maps you can use Google maps and select the “get link” feature and cut and paste it in.

You also control which fees display for each course and have options to include fees other than just tuition, i.e., textbooks, T-shirts, etc.

Registering on the COURSE DETAILS screen:

If a client wants to register for the course his/she hits the tab ADD TO CART at the bottom of the screen. Alternatively, a client can select BACK that will bring the individuals back to the SEARCH RESULTS screen.

Note: Clients are required to LOGIN or create a New Account in order to add courses to their cart.

ADDING A COURSE TO YOUR CART **YOUR CART**

Once the client has selected a COURSE and has added to his/her cart, a YOUR CART screen appears. The registrant will see the course they have added to their cart. They can hit the back button to go back to the previous screen, search more by clicking the SEARCH MORE button provided (or by clicking on Course Search on the left side of the screen), or start the checkout process. Even activities that have no cost can be included such as orientations or free seminars.

CHECK OUT-REVIEW

This screen enables the registrant to verify the order information and then click on the "Place Order" button to complete his/her order. The client must accept the refund and cancellation policies before he/she can PLACE ORDER.

PLACE ORDER – PAYMENT

For training use the credit card number Visa 4111111111111111 with any CVV (i.e., 123) and an expiration date beginning with the year 2012.

After accepting the REFUND and CANCELLATION POLICY, the registrant is brought to SCHOLARCHIP to pay for the course(s). ORDER DETAILS are revealed, followed by a request for PAYMENT requiring valid credit card information and address for the cardholder. The registrant then is able to review his/her order via ORDER SUMMARY, and finally an ORDER CONFIRMATION is given.

Registrants are able to cancel their order during processing.

Registrants can print a receipt of their transaction.

PART TWO

COURSE CREATION & STUDENT REGISTRATION

from the Admin Side:

OPERATION BASICS, EXPLORING ANCOR MENUS, COURSE CREATION (Checklist), SELECTS MENUS and STUDENT REGISTRATION

Operation Basics

Browser Compatibility

1. Mozilla Firefox – Version 1 and above
2. Microsoft Internet Explorer – Version 7.0 and above

ANCOR Home Page

1. Open your web browser.
2. Enter the URL address: <http://ancor.rutgers.edu/>
3. Select from three function login options that are color-coded:

RED - ANCOR Admin Login

(Enter your user name, password, and access PIN # , and branch.)

GREEN – Register for Training

BLUE - ScholarChip Login

(Enter your user ID and password.)

PURPLE – Sand box Login

(Enter your user name, password, and access PIN # provided by your system administrator, and branch.) For training – use the branch: TRAIN. Once the system goes live, use your regular branch.

Note:

- If you forget your password, Deb Niece - your system administrator can set a new password for you.
- Passwords are case sensitive.
- If you forget the access PIN #, contact your system administrator.

Tip:

- To speed the login process, create a shortcut on your desktop directly to the URL or add the URL to your web favorites list.
- The system will prompt you to periodically change your password. Changing your password helps reduce the possibility that someone else could obtain and use your login and password.

NOTE: If you do not see a pop-up screen – chances are that it is layered right behind the other screen you are viewing. Hit F10 on a MAC and the screen will come to the front.

Logging Out of ANCOR

1. Use the Logout option instead of the Windows Close button to logout.
2. From header, click on the logout option.

EXPLORING THE MAIN MENU

Screen Components

Once you have logged on to ANCOR the Dashboard screen appears. To become familiar with ANCOR, you will need to identify the screen elements. The following is a list of the screen elements in ANCOR and the titles for those areas.

TOOL BAR – Located on the upper left and contains a variety of function buttons:

Main Menu |Reports| Admin| Dashboard

Menus are only visible if the user has permission for the one or more of the submenus for the respective menu. To activate a menu click on the menu option name to move to that section.

Overview of Navigation in ANCOR: (a) Navigating through Menus, (b) Records, and (c) Forms

The screenshot shows the 'Schedule/Details' page in ANCOR. On the left is a navigation menu with categories: Clients, Courses, Supplemental, and Accounting. The main area contains search filters for Course ID, Days of Week, Period, Session, End Date, and WIA Type, along with dropdowns for Course Status, Facility, Room, and Teacher 1. A table at the bottom displays 4 records for 'Introduction to Trigonometry'. Red callouts are placed as follows: 1 on the 'Attendance' menu item, 2 on the 'New' button, 3 on the 'End Date' field, 4 on the table, 5 on the 'Page 1 of 1' indicator, and 6 on the bottom right of the page.

Form Tabs

A horizontal navigation bar with seven tabs: 'Info' (highlighted in red), 'Registration', 'Profile', 'Outcomes', 'Family', 'Case Notes', and 'Checklist'.

A vertical navigation menu with the following sections:

- Clients**
 - Clients
 - Attendance
 - Case Notes
 - Course Work
 - Employment
- Courses**
 - Course Info
 - Schedule/Detail
- Supplemental**
- Accounting**

 At the bottom, there are links for 'Admin Menu' and 'Report Menu'.

Navigation Skills

There are three types of Navigation in ANCOR: (a) Navigating through Menus, (b) Navigating through Records, and (c) Navigating through Forms. The following will demonstrate each.

Navigating through Menus:

There are three main sets of menus:

Main Menu (default menu when you first log into ANCOR)

The Main menu contains the submenu options of Clients, Classes, Accounting, and Selects (A-D) (E-M) (N-Z).

Report Menu

The Report Menu is broken down by the types of reports available in ANCOR such as: Attendance, Clients, Courses, Financial, Government, Marketing, Outcomes, Personnel, System.

Admin Menu

The Admin Menu is broken down by the various types of administrative settings and functions such as: Client Functions (fee groups, adding residency, etc.), Course Functions (changing start and end dates, deleting sections, etc.), Export Functions (client contact data) System Tools (system administration like staff functions), and organizational information (Settings). Depending on the permissions assigned to your user name, all these menu options may not be visible.

Clicking on **Dashboard** brings you back to the main split screen that lists **News and Information** from Xenegrade - the software manufacturing company - with updates to the system on the left side, and updates from Rutgers DoCS on the right side.

QUICK SEARCH – Located on the top of the screen in the middle

You must ALWAYS search for an existing client record prior to entering a new client record.

Quick Search enables you to quickly access information on either a client or a course by using partial data like:

Client's Last Name Or Course Code

Client SS# Or Course Title

Example:

A returning client calls and wants to register for a course. You want to search to pull up their record. You enter the first few letters of their last name or the first few numbers of the course in which he/she wants to enroll.

For the purposes of this example we will search by name. There are two ways to do this.

Searching for Client Records:

1. Using Quick Search – reveals the first 1000 records. For example: If the client's last name is Timoney, type Timoney in the **Quick Search** box. Make sure that **Client: Last Name** appears in the box located directly to the right of Quick search.

Next, click on the **MAGNIFYING GLASS** located directly to the right of the Quick Search box. Scroll down and see the first 50 listing of clients named Timoney. Click on the client's name from this list. The **CLIENT SCREEN** appears. (You can also search by course code, social security number, etc.) See **Searching for Client Records** on Page 31 for more detailed information on searching for client records.

CREATING COURSES – THE QUICK START CHECKLIST:

Main Menu

Prior to creating courses or sections, the following **required** information must be completed: facility types, facilities, buildings, locations, cancellation and refund policies, sessions, staff, department, and textbook information (if selling textbooks for the course).

Note: **Locations** are made up of three elements – Example:

Facility: Computer Lab (street address can be included here)

Building: Public Safety Building

Room: Room 205A

This is how the location for your course is displayed on the web (Facility, Building, Room – i.e., Computer Lab, Public Safety Building, Room 205A). Think about how you wish the location for your course to appear and write this down before beginning.

Quick Start Checklist

Selects Main Menu>Selects A - Z

Explaining Facility Types, Facilities, Buildings and Locations.

- 1 **Facility Types:** Main>Selects E-M>Facility Types **Must have at least one type added**
These do not show on the web – i.e., Restaurant, Campus, Pool, etc.

- 2 **Facilities:** Main>Selects E-M>Facilities **Must have at least one facility added**
This is the first way your client's searches to find the location of your course.
First, ask yourself, "How does my client look for the course location?"
This is the first word to describe the location – i.e., Senior Citizen Center, Online Course
Highland Park, Garden Club, Cook Campus, etc. Addresses are included in this field.

- 3 **Buildings:** Main>Selects A-D>Buildings **Must have at least one building added**
This could be Public Safety Building, Marriot Hotel, Western Monmouth Education Center,
Ballroom, etc.
You can use a "-" for one of the Buildings when the Facility is the Building. Example: New
Brunswick High School might only have 1 building, but it is the Facility - just use the dash.

- 4 **Locations:** Main>Selects E-M>Locations. Locations are made up of a Facility, Building and
Room. This is where you include the room: Computer Lab (street address can be included
here.), Public Safety, 205A, etc. This can also contain a link to a map of the location. This link will
show on a Course Detail in Web Registration. **Students can locate courses by searching for
locations in Course Search. Must have at least one building added.**

- 5 **Cancellation and Refund Policies:** Main>Selects>N-Z Policy. Create Cancellation and Refund
Policies that will later be attached to course sections. Can create numerous policies.

- 6 **Sessions:** Main>Selects N-Z >Sessions. A Session must be set to Display Online and Display
Cart for courses in that session to show and be purchased. **Must have at least one Session
added.**

- 7 **Staff:** Main>Selects N-Z>Staff. Enter your Instructors in this area. If you do not know your
instructors prior to a course, add a Staff member called TBD – To Be Determined.
The staff code is like a ClientID. It must be unique. Many organizations use first initial last name.

- 8 **Textbooks:** (Needed only if textbook are sold separately in the course – other wise omit.)
Main>Selects N-Z>Textbooks. Enter the textbook name and vendor information. Then click on
name in menu – click on Textbook Inventory and complete info.

COURSES



[Courses](#)

CREATING A COURSE –

Laying the Groundwork

Now that you have input the required “Quick Start Checklist” information for a course and section, you can start building your course information.

Additional options are available such as creating discounts and program groups, which will be discussed during the section on SELECTS menus.

CREATING A COURSE: Main Menu>Courses>Courses>New

A Pop Up window appears requesting the following information that will aid you in creating a course:

Course ID, Course Title, Category, Activity Type, Required (Elective or Required), Description, Prerequisites, etc.

Overview

Courses, classes, and programs are various terms used by educational organizations to identify the activities that students register for and attend. In this case, ANCOR will utilize the term Course for this purpose. A complete detailed Course is made up of two elements - Course Info and Section Info (also known as Scheduling Info). Course Info includes the basic information that does not typically change over a program year or session such as course title or description. The second part, the Schedule, contains the data elements that change from event to event such as start date, location, instructor, days of the week.

Both the Course and the Section have their own ID code, when combined become the full Course Code. For example: An Auto Chassis course has a Course ID of "AUTO" and has three sections with IDs of "101", "102", and "103". The full Course Code would be "AUTO101", "AUTO102" and "AUTO103" respectively. This Course design reduces data entry for multiple offerings or sections of the same course and allows for more flexible search options when filtering data for reports.

TO ADD A NEW COURSE: Click on the NEW button in the Toolbar – Fill out the required information (Course ID and Course Title are required). After completing click OK.

Details

- Course ID field cannot be duplicated in more than one record and is a required field. Can include up to 15 alpha and numeric characters. Only alpha, numeric, the asterisk, the dash, and the underline characters can be used. Spaces and special characters (such as !, @, #, \$, %, ^, &, *) are not allowed. Note that use of the asterisk character is allowed but can adversely affect searches as an inappropriate use as a wild card character.
- Course Category list is user defined.

SECTIONS

ADDING A NEW SECTION: From the Info tab of the New Course, you've just created click the Sections Tab.

NEXT: You'll need to add a section by Main>Courses>Section>New

Click on the **SECTIONS** tab, which brings you to another screen.

Next: Click on the **NEW** tab over on the right.

That creates a pop-up that has tabs on the top:

INFO, SCHEDULE, PROGRESS, OTHER, WEBREG – here's what needs to be completed in each of those tabs:

Beginning with **INFO**, complete the requested information that includes: **Section ID, Session, Course Status, Start and End Dates, Text (if needed) start and end times, Department (ScholarChip code), etc.**

Required fields that must be completed include: Section ID, Course Status and Department.

Note: Department: Main>Selects>A-D>Department. Enter the department name, department manger (optional – from staff menu), alt. e-mail address (contact person), and ScholarChip Department Code. For the launch, the department codes have already been added. Going forward if any new departments are added – this is where you will input the department information.

Next: Click on the **SCHEDULE** Tab in the pop-up this contains information like: Days of the week that the course meets, contact hours per day, total number of class minimum and maximum enrollment, teacher, location, number of CEU's, etc.

Required fields with this screen: Minimum Enrollment, Maximum Enrollment, Calculation Method registration either by per quantity (individual) or per registration (company)., **Maximum Qty. Purchase** numeric value limiting number of seats one person can purchase for course – i.e., one person can buy up to 10 seats-Max. Qty = 10)., **Teacher, Location, Cancellation Policy, Refund Policy. Cancellation and Refund Policies are drop down menu's that have been completed as part of the Quick Start Checklist. You must also include a Maximum Enrollment number or the course will not show on the web.**

The **PROGRESS** tab primarily deals with grading – many of you may not use this.

Next: The **OTHER** tab lists a variety of info. related to a client's status i.e., homeless, workplace literacy, corrections, etc. Most units/braches won't use this either.

Next: The **WEBREG** Tab **controls what information is seen online**, and when it is displayed, and includes the cart button, links and alternate display features (New, Update, Available Slots, etc.). You must click on "Yes" for the course to display online.

After completing all information in these tabs in the pop-up (Info, Schedule, Progress, Other, WebReg) Click on OK.

Now that you have completed the first part of adding a Section– let’s fill in the rest of the needed information!

You’ll notice a **View Icon** (it looks like a sheet of paper) at the far right of the row of information noting course section information. Click on the **View Icon**. (Alternatively, you can use the **Go To** drop down located at the right of the screen to fill out the following information:

This brings you to a screen with the following tabs:

Info., Enrollment, Finances, Materials, Coursework, Calendar, Program Groups, Roster Log, and Skills Profile.

INFO TAB:

- Click on **Edit** in the toolbar to change information on this tab.
- Section ID: Section ID field cannot be duplicated in more than one record of the same Course and is a required field. Can include up to 15 alpha and numeric characters. Only alpha, numeric, the asterisk, the dash, and the underline characters can be used. Spaces and special characters (such as !, @, #, \$, %, ^, &, *) are not allowed. Note: use of the asterisk character is allowed but can adversely affect searches as an inappropriate use as a wild card character.
- Course Status is not user defined and is a required field. Options include: Offered, Cancelled, Inactive, Pending.
- Start Date Text and End Date Text: Text entered into these fields will replace Start and End Date fields in the WebReg module when actual Start and End Dates are not entered. Optional.
- Information that is displayed here can be controlled by settings within the Branch Profile: Admin>Settings>Branch Profile, which is regulated by the system administrator.

ENROLLMENT TAB:

Allows user to filter, view, and edit the list of Client Assignments for the Course Section. Includes same records as Client Registration Assignments.

Details

- Results List opens by default to list of "Enrolled/Active" Assignments. If there are no "Enrolled/Active" Assignments, the list will be empty. Change the filter using the status drop down option to change the results list to a different Enrollment Status value.

FINANCES TAB:

Financial Fees – Adding Fees to Course Sections

In **COURSES>SECTIONS>FINANCES>Fees>New**

Click on **FEES> NEW** located on the upper right corner

This brings up a pop-up window that has the following information:

Required fields in Add Fee: Revenue Item (Drop down of tuition, meals, accommodation, etc.), primary fee (do not use commas), unsubsidized fee, minimum payment, fee group, fee method, and income account. After filling out required fields click **OK**.

In Detail:

Adding Course Section Fees

- Go to view mode of the Course Section desired.
- Go to the **Finances** tab.
- Click the New button to the upper right of the Fees window.

- Add field values as appropriate.
 - Revenue Item: The type of revenue associated with this fee (i.e., tuition). Revenue Item is a user defined list. Required field.
 - Primary Fee: The amount of the fee. Must be a positive number. Required field.
 - Unsubsidized Fee. Leave as 0.00. Required fee.
 - Allow Minimum Payment: This field is used to enable or disable the Minimum Payment feature for this course section in the WebReg module.
 - Minimum Payment: The amount a client can pay as a minimum deposit when making a purchase using the WebReg Module. If the amount is less than the fee, the balance of the fee will be entered as a billing transaction. This feature is only in effect when the following settings are valid in the Branch Profile field and the Course Section Fee field called Allow Minimum Payment is Yes.
 - Fee Group: The Fee Group list is user defined and more than one can be selected (multi-select). At least one should be selected. Fees without a Fee group will not register or be charged correctly in the Web Registration module or in Balance Due calculations.
 - Include in Balance: If checked, this fee is included in all Balance Due calculations. At least one fee must be tagged as Include In Balance to display in the WebReg module. Fees not tagged as Include in Balance = Yes will not be included in Balance Due calculations in the Admin module and in the amount due calculation in the WebReg module.
 - In Minimum Due: Check this box if this revenue Item should be included in a minimum amount due such as a deposit. This value also copies to Program Enrollment Invoice using the Auto Invoice function. This field is only available when the Use Program Tracking field is enabled from the Branch Profile >> Preferences.
 - Fee Method: There are three types of variable/optional fees are available. If not selected or set to "Required", the fee is considered a Required Fee and not a Variable or Optional Fee. Required field.
 - Required: The value for all fees unless a variable or optional fee.
 - Pick One: Two or more fee options are available and client must pick only one.
 - Pick Multi: Two or more fee options are available and client must pick one but can pick more than one.
 - Optional: One or more fees are available but are all optional. Client does not have to select any optional fees. (Note: Optional Fees cannot be used alone without a Required, Pick One or Pick Multi Fee.)
 - **Fee Label:** Each fee can have a separate label to identify the choice. Enter up to 25 characters to identify the fee. When Fee Method is "Required", the label will display next to the Revenue Item name in the Course Detail page of the WebReg module. **This is important because it impacts how data and fees are classified as revenue.**
 - Default Pick: This field is used only to pre-select an option for determining an aggregate fee in the WebReg module before a client has logged in and the Fee Group is unknown. If checked, the fee will be included in the aggregate fee for the course on the Search Results and Course Display pages. Once logged in, the client will see accurate fees based on their Fee Group rather than the default fee total. Only used when Fee Method is not "Required".
 - Income Account: The account attached to the fee. If selected, will override the default value selected as the Revenue Account identified in the Course Section.

Adding Different Rates for Regular Fees to a Course Section

Fee amounts can vary for different Fee Groups. When the Client logs into the WebReg module, the fees displayed and charged match those for their Fee Group. Fee Group also determines which fees are used when making a Balance Due calculation.

- When entering fees as noted above, select only the Fee Group(s) for the desired fee.
- Make sure all Fee Groups have fees associated with the group. If not, amount due and balance due calculations will not calculate as desired.

Sample Fees: In this example, three fee records are added, two for Tuition Fee and one for Supply Fee.

- Fee Group = Regular
 - \$100 Tuition Fee
 - \$15 Supply Fee
 - \$115 total
- Fee Group = Employee
 - \$50 Tuition Fee
 - \$15 Supply Fee
 - \$65 total

Adding Variable and Optional Fees

Variable and Optional fees allows for flexible fees to be added to course sections. Can be used in conjunction with or without a regular, required fee. The use of Fee Groups is supported for Variable and Optional Fees just as it is for Required Fees. When adding a new Assignment to a Client for a Course Section with Variable/Optional Fees, a prompt will appear for selecting the choices for that Client. Those options can be edited at any time from the Client Assignment Results List screen (Edit Fee Options).

- Fee Method: There are three types of variable/optional fees are available. If not selected or set to "Required", the fee is considered a Required Fee and not a Variable or Optional Fee.
 - Pick One: Two or more fee options are available and client must pick only one.
 - Pick Multi: Two or more fee options are available and client must pick one but can pick more than one.
 - Optional: One or more fees are available but are all optional. Client does not have to select any optional fees. (Note: Optional Fees cannot be used alone without a Required, Pick One or Pick Multi Fee.)
- Fee Label: Each fee can have a separate label to identify the choice. Enter up to 25 characters to identify the fee.
- Default Pick: This field is used only to pre-select an option for determining an aggregate fee in the WebReg module before a client has logged in and the Fee Group is unknown. If checked, the fee will be included in the aggregate fee for the course on the Search Results and Course Display pages. Once logged in, the client will see accurate fees based on their Fee Group rather than the default fee total.

Sample Variable and Optional Fees

- Sample Fees for a Three Day Conference
 - Required:
 - Registration Fee = \$25 (All Clients will pay this fee)
 - Pick One:
 - Three Day = \$450 (default)
 - Two Day = \$325
 - One Day = \$200

- Pick Multi:
 - Lunch Day 1 = \$20
 - Lunch Day 2 = \$20
 - Lunch Day 3 = \$20
 - Dinner Day 1 = \$30
 - Dinner Day 2 = \$30
- Optional:
 - Membership Fee = \$150
 - Audio/Video Collection of Conference = \$295
- Sample Fees for a Weekly Yoga Class with Up To Five Day Option
 - Required Fee = None
 - Pick Multi:
 - Monday = \$25 (default)
 - Tuesday = \$25
 - Wednesday = \$25
 - Thursday = \$25
 - Friday = \$25
 - Optional:
 - Yoga Pad Kit = \$50
- Sample Fees for a Ballroom Dance Class for Singles or Couples
 - Required Fee = None
 - Pick One:
 - Single = \$125 (default)
 - Couple = \$195

Adding Minimum Deposit Fees

Minimum Deposit Fees are used when the Client is allowed to pay an amount less than the total amount due at the initial purchase via the WebReg module. When a course section has a minimum payment option and all valid settings are in effect, the client will see an option to enter an amount of the payment. The default will be the total amount. The client can enter a numeric value between the lowest allowed value (minimum payment) and the total due. If the client enters a value lower than the minimum, the value will be changed to the minimum. If the client enters a value higher than the total, the value will change to the total due. The difference between the Amount Paid and the Total Due will be entered as a "Bill" transaction. This must be enabled through the Branch profile settings.

***Note:** You can check how your course section will appear on the web by:*

Clicking on the Check Web Search button on the blue tool bar located on the Section Info. screen.

Creating Discounts

Main Menu > Selects > Discounts. Discounts for course tuitions display when a customer registers for a course section that meets the discount qualifications. The discounts display on the Cart, Checkout Review, Order Complete, and email confirmations. The discounts record in the General Ledger as Payment Type = Discount.

1. Discounts are connected to Invoices so they reflect an accurate invoice balance.
2. The Single and Multi-Assignment function will add eligible discounts automatically but can be removed from the invoice if desired.
3. A Discount can always be added manually to Invoice Items if needed.
4. When a Discount gets added to the Invoice Line Items, it uses a Revenue Type = Discount.

There are three types of discounts: Early Bird, Promo Code, and Quantity.

Numerous criteria can be set that expands the possible course sections the discount can be applied to.

- The discount can either be a set amount or a percentage, but not both.
- When a discount is applied and the calculation results in a number with three or more decimal places, the discount amount is rounded using the standard rounding rule as follows:
 - A number such as 24.495 would round up to 24.50.
 - A number such as 24.494 would round down to 24.49.
- Multiple discount creation is supported. However, only one discount will ever be automatically applied per registration. The following rules are in effect if multiple discounts exist for the same course section:
 - If the multiple discounts vary per discount type, the order in which they are queried and applied is based on the Branch Profile > Preference > Discount Order. Debra Niece will meet with branch/unit heads to set these in the system.
 - If the multiple discounts are for the same discount type, they are queried in descending order first by the discount amount and then second by the discount percentage.
 - During the discount query process, the first eligible discount that is reached is the discount that is applied. The discount query process for the specific course section stops at that point and continues for the next course section.
 - This query method increases the probability the client will receive the highest discount available, but does not assure that the highest resulting discount is always selected in every situation.
- When a Client using the WebReg module adds items to the cart, the discount table is queried to see if any eligible discounts exist and if so, applies one. The same process occurs when a user in the Admin module uses the Multi-Pay grid from the Client Payment screen. Note that if a course section has a valid Promo Code discount, the discount is listed automatically in the Multi-Pay grid without having to enter the Promo Code. In the WebReg module, the Promo Code must be entered by the client to enable the discount.
- The Quantity discounts only apply as follows:
 - WebReg Module: When the registrations that qualify for the Quantity discount are all in the Cart for the same purchase at the same time.
 - Admin Module: When the registrations that qualify for the Quantity discount all contain the same Registration Date and the Registration date is the same date the Multi-Pay grid is being used to make the payments. If using the Multi-Pay grid to make payments after the Registration Date, the Quantity discount evaluation will not include those registrations. If the Quantity discount is still valid, the discount transaction must be entered manually.
- If a discount is greater than the amount due, the resulting amount will be zero. A discount will never result in a negative amount due.
- When the discount transaction is recorded, the Discount title is saved with the transaction for future reference and marketing analysis.
- When the discount transaction is recorded, the Discount reason is saved in the Refund/Discount reason field if an existing record exists in the Refund Reasons table spelled exactly as follows. Refund/Discount Reasons can be added at Main Menu > Selects > Refund Reasons.
 - Early Registration discount
 - Promo Code discount
 - Quantity discount

- If any value of a Discount is modified after the Discount has been used, any existing transactions that used the Discount are not modified. Only future transactions are affected by the modification.

Steps to Creating a Discount

- Step 1: Add a New Discount
 - Go to Main Menu > Selects > Discounts.
 - Click the New button in the toolbar.
 - Select the Discount Type from the list of three options: Early Reg, Promo Code, Quantity. This is not a user defined list and is a Required field. It is highly suggested that once a discount is created the Discount Type is not modified.
 - Create a Discount Title. This is the name of the discount that will appear for the Admin module user or WebReg client will see when a discount is applied. In the WebReg module, the discount title will be followed with the '(discount)', so the word 'discount' does not need to be added to the title. Discount Title must be unique and is a Required field.
 - Add either a Discount Amount or a Discount Percent. Only one value can be greater than zero and neither field can be left blank.
 - Add a Discount Description if desired. This is an Optional field for reference purposes only and does not display anywhere a client would be able to view the field's content.
 - Click on the Settings tab. The fields on the Settings tab will vary based on the Discount Type selected.
- Step 2: Setting the Parameters for the Discount.
 - Early Reg
 - Enter a positive number for the number of days before the course start date when the Early Bird discount expires. A value of zero will allow for the discount to be applied up to the start of the course section. The Course Section must have a Start Date for the Early Reg discount to calculate correctly.
 - Promo Code
 - Enter the Promo Code the client will enter to trigger the discount. Promo Codes are not case sensitive. Use single words and refrain from using spaces. Up to 12 characters can be entered. The client will see a Promo Code entry field in the Cart page of the WebReg module if a promo code discount is available. In the Admin module when using the Multi=Pay grid, if a promo code discount is in effect, it will display automatically without entering the promo code.
 - If this Promo Code should only be used one time, check the box for One Time Use. If checked, when the discount query process occurs, the existing discount transactions are searched. If the discount has been used, the discount is ignored and not applied. This is a One Time Use across all clients, not per client.
 - Quantity
 - Enter a positive number for the quantity of courses required to obtain the discount. The value must be greater than one for the discount to apply. Note that the Quantity field of a Registration is used as part of the discount eligibility process. For example, if a Registration Quantity of 3 would qualify for a Quantity Discount of 3.
- Step 3: Setting the Restrictions for the Discount.
 - Early Reg

- Select an End Date for the discount to end. The discount will expire on the date listed. Optional.
 - Promo Code
 - Select a Start Date for the discount to start. The discount will start on the date listed. Optional.
 - Select an End Date for the discount to end. The discount will expire on the date listed. Required.
 - Quantity
 - Select a Start Date for the discount to start. The discount will start on the date listed. Optional.
 - Select an End Date for the discount to end. The discount will expire on the date listed. Required.
 - If registrations for Account members of the client can be used towards qualifying for a Quantity discount, check the box for Include Members. Otherwise, Members' registrations are ignored.
 - All Discounts
 - The following additional restrictions are available for all Discount Types. One or more of these restrictions can be used together to target a discount. Note that if too many restrictions are set, the possible result could be that no course section meets the qualification eligibility.
 - Course: Select a Course if ALL sections of the course qualify for the discount.
 - Section: Select a Section if the ONE course section qualifies for the discount.
 - Category: Select a Category if ALL sections for courses with this Category qualify for the discount.
 - Program Group: Select a Program Group if ALL sections or courses with this Program Group qualify for the discount.
 - Session: Select a Session if ALL sections with this Session qualify for the discount.
 - Fee Group: Select a Fee Group if the discount only is valid for clients with the specified Fee Group.
 - Examples:
 - Course and Session are selected: All sections for the specified Course will qualify but only for the specified Session.
 - Category and Session are selected: All sections with Courses that are in the specified Category will qualify but only for the specified Session.
 - Section is selected: Only this one Course Section will qualify.
 - Fee Group and Session are selected: All clients with the specified Fee Group will qualify but only for the specified Session.
- Step 4: Save the Discount
 - The discount is immediately available for use based on the parameters and restrictions set.

Overview

Client Profile Questions allow for special questions to be asked of a client during the registration process.

- The questions appear when the cart is submitted and before the payment information is collected based on the registrations in the cart.
- The fields require the client to submit a reply even if the reply is None or NA. The question cannot reply be left blank.
- If the Client's Profile already contains a reply for the question, it will populate the answer and allow the client to change the answer.
- The reply is saved as soon as the client submits the page even if they cancel the order before the final checkout process.
- If the cart contains registrations for the Client and for Client's members, the questions will be listed for all clients in the cart even if the questions are repeated.
- These questions only appear in the WebReg module. However, all these values can be entered in the Admin module on a manual basis.
- Some of these questions may also be in the Client's profile, but will display again if the registrations in the cart require the display.

There are two types of Client Profile Questions:

- Classifications Questions
 - The replies for these questions are recorded under the Client Profile tab under the Classifications heading.
 - The reply is either defined by the user (select list reply) or the client (text reply).
 - The name of the classification is recorded for the Client Classification and the reply for the question is recorded in the Notes field.
 - Client Info Questions
 - The replies for these questions record directly into a specific existing field within the Client's Info section and not in the Client Classification section.
 - The replies are preset to match the specific field selected.
 - Note that these fields must be enabled in the Client Custom Form in order to view the field values in the Client Info record.

Adding a Classification Question

- Go to Main Menu >> Selects >> Classifications.
- Click the New button in the blue toolbar to start a new record.
- Enter a Classification Name. This will be the name displayed in the Client Classification record so it should have some type of name recognition to a user. Duplicate Classification names cannot exist. Names such as Single Parent and Single Parent 1 can both exist. However, each will save as separate classifications under the Client Classification section.
- The Classification Category field is optional. Entering a value may be helpful for reporting.
- Description is optional.
- Set Program Display = No. This field is not required or used in this case.
- Set Web Display = Yes. If set to No, the question will never appear in the WebReg module.
- Set the AutoOption = No. This field is not required or used in this case.
- Question Settings:

- Question: Enter the question exactly as you want the question to display to the client including punctuation. Include instructions such as “Enter None if not relevant”.
- Type of Answer: Select either Text or Select. If Text, the Client will see a text field to enter the reply. No formatting is enforced so even dates will be entered as text. If Select, the Client will see a select list from the list created in the next field.
- Select List: Enter all the items for the list separated by commas, but no spaces between the list items. For example: ‘NA,Yes,No’ would show a Client three options.
- Select the restriction when the question should display. More than one restriction can be selected. However, there is no need to duplicate values across fields when the results are redundant. For example, if a Course Section is selected, there is no need to also select a Course and Session.
 - Course: All registrations matching one course
 - Section: All registrations matching one specific course section
 - Category: All registrations matching one course category
 - Program Group: All registrations matching one program group in a course or section
 - Session: All registrations matching one session in a course section
 - Fee Group: All registrations matching one client fee group

Adding a Client Info Question

- Go to Main Menu >> Selects >> Classifications.
- Click the New button in the blue toolbar to start a new record.
- Enter a Classification Name. The name must match one of the options listed below and entered exactly as the reserved word is listed below. Duplicate Classification names cannot exist. Names such as Web-Allergy and Web-Allergy1 can both exist. Both will save in the exact same location.
 - Web-Allergy: This value will record in the Client’s Info >> Other tab. Text reply as entered by client.
 - Web-BirthDate: This value will record in the Client’s Info >> Demographics tab. Formatted date reply as entered by client.
 - Web-CellPhone: This value will record in the Client’s Info >> Address/Phone tab. Formatted text reply as entered by client.
 - Web-DominantLanguage: This value will record in the Client’s Info >> Demographics tab. Select list reply from Languages table.
 - Web-Ethnicity: This value will record in the Client’s Info >> Demographics tab. Select list reply from Ethic table.
 - Web-Gender: This value will record in the Client’s Info >> Demographics tab. Select list reply of M or F.
 - Web-GradeCurrent: This value will record in the Client’s Info >> Demographics tab. Select list reply using list from -1 to 12 where -1 = pre-school, 0 = kindergarten and 1-12 = the year of school.
 - Web-Guardian: This value will record in the Client’s Info >> Info tab. Text reply as entered by client.
 - Web-HomePhone: This value will record in the Client’s Info >> Address/Phone tab. Formatted text reply as entered by client.
 - Web-LicensePlate: This value will record in the Client’s Info >> Other tab. Text reply as entered by client.

- Web-Medical: This value will record in the Client's Info >> Other tab. Text reply as entered by client.
- Web-Nationality: This value will record in the Client's Info >> Demographics tab. Select list reply from Countries table
- Web-SchoolCurrent: This value will record in the Client's Info >> Demographics tab. Text reply as entered by client or select reply as pre-entered by user.
- Web-WorkPhone: This value will record in the Client's Info >> Address/Phone tab. Formatted text reply as entered by client.
- The Classification Category field is required and must be 'WebReg'. If the Category does not, it must be added on the Main Menu in Selects A-D.
- Description is optional.
- Set Program Display = No. This field is not required or used in this case.
- Set Web Display = Yes. If set to No, the question will never appear in the WebReg module.
- Set the AutoOption = No. This field is not required or used in this case.
- Question Settings:
 - Question: Enter the question exactly as you want the question to display to the client including punctuation. Include instructions such as "Enter None if not relevant".
 - Type of Answer: This option is not used with the Client Info Questions as the replies are preset.
 - Select List: This option is not used with the Client Info Questions as the replies are preset.
 - Select the restriction when the question should display. More than one restriction can be selected. However, there is no need to duplicate values across fields when the results are redundant. For example, if a Course Section is selected, there is no need to also select a Course and Session.
 - Course: All registrations matching one course
 - Section: All registrations matching one specific course section
 - Category: All registrations matching one course category
 - Program Group: All registrations matching one program group in a course or section
 - Session: All registrations matching one session in a course section
 - Fee Group: All registrations matching one client fee group

Funding

In the left corner of the screen there is a drop down menu that lists both Fees and Funding. Choose Funding and click on new to create information on funding.

MATERIALS Tab **Overview**

List of instructor requests for equipment by Course Section. This also includes where textbooks are added. Could also be used for other requests such as room layouts, copying, facility needs, field trip plans, or similar needs.

Details

- Equipment name field is user defined and is a required field. Can be found in the Main>Selects>Equipment.

To Add Textbooks: *Note: Textbook information should already be entered in Main> Selects > Textbooks as part of your Quick Start Checklist. You must have entered this information while setting up the course.*

This section describes how to sell textbooks online via the Web Registration module.

How to Add A Textbook for Online Sales:

- Go to **Main Menu >Courses > Sections**.
- Locate and go to View mode for the course section desired.
- Go to the Materials tab and filter for Textbooks.
- Click the New button for a new textbook.
- Select the desired textbook and check the Sell Online option, and click OK to save.
- The Sales Price plus the Sales Tax values associated with the most recent textbook Inventory record tagged as "Opening Balance" or "Order". Inventory records tagged as "Returns" are ignored for determining price. If no relevant inventory record exists, the textbook will not display in Web Registration.
- The textbooks will display on the Course Display screen of Web Registration along with the price. The client is provided the option to select each textbook at the time they select the course section for the cart.
- If the same textbook is available for more than one course section, it must be attached to each course section.
- If the client is a Corporate Primary Account, the ability to select quantity will also display.
- When recorded in the client payment table, the quantity is also recorded.
- A new field for Delivery Date is available in the Client Payment to record when the textbook(s) were delivered to the client.
- A Textbook sale will record as a separate transaction in the General Ledger.
- A Revenue Item must exist called "Textbook" and is not included in Balance Due calculations.

COURSEWORK Tab:

Overview

List of instructor assigned student work by Course Section. Coursework can include homework assignments, quizzes, exams, projects, extra credit, or any task an instructor desires to record and/or grade a student on. Once created, the user adds Course Work to Clients at Main Menu > Clients >Course Work.

Details

- Coursework ID is user defined and is a required field. Suggested example: H120205 could mean homework assignment on 12/2/05.
- Coursework Category list is user defined and is a required field.
- Due Date is date Coursework is due to be completed.

CALENDAR Tab:

Overview

Allows user to create a separate, individual calendar for this Course Section.

Details

- It is not necessary to create a separate calendar if this Course Section follows the settings in the master Calendar. If a Course Schedule Calendar exists, it takes precedence over the master Calendar in some reports.

PROGRAM GROUPS Tab:

Overview

Program Groups are used to organize Courses and/or Sections into categories. Program Groups is one of the few categorization fields that is both in Courses and Sections, and is multi-select in both areas. If all Sections of a Course the same Program Group, it is not necessary to tag all the Sections of that Course to the Program Group. Program Groups are often used to show all the courses for a certificate or degree course, but can be used for many different types of organization desired.

Before adding a Program Group for a Course Section – make sure that a Program Group already exists:

Navigation: *Main Menu > Selects > Program Groups*

Details

- Group Code and Group Title are required fields.
- Web Display: Display on Web Registration search page as separate search option.

Sequences

The Sequence feature provides the ability to create a list of all the required courses for a certificate or degree program and identify the general order they should be taken

To Create a Program Group for a Course Section

- Go to Main Menu > Courses > Sections.
- Search for the Section to which a Program Group is to be added.
- Go to view mode for the Section.
- Go to the Program Group tab.
- Click the New button to the upper left of the Results List window.
- Select a Program Group from the list.
- Click OK to save. Add as many Program Groups desired.
- To modify a Program Group selection, you must delete the desired Program Group and add a new Program Group.

ROSTER LOG Tab:

Overview

Allows user to create a Roster Log for the Course Section to help you track when attendance rosters are due, received, and recorded.

Details

- This data feature creates a log assisting an organization track overdue attendance rosters and analyze lag time between due dates and completion dates.

Special Functions

Copy:

This function copies an existing Roster Log from another Course Section. When prompted, enter the Course Code from the other course section. Only the Due Dates will copy.

SKILLS PROFILE Tab:

Overview

The Skills Profile section allows a user to create a master profile template of identified skills for a course section to later be used to add the profile to clients.

Note:

- Up to three Skills Profile templates can be created per Course Section.
 - Content 1: Skills related to the content of the course.
 - Content 2: Alternate skills related to the content of the course.
 - Universal: Skills related to a universal set of foundations.
- A master Skills Profile must exist for a Course Section before the profile can be added to a matching Client Assignment.

AFTER COMPLETEING ALL THE COURSE AND SECTION TABS – you can CLONE SECTIONS

CLONING SECTIONS – Located in the light blue tool bar

Main>Course>Section>Clone Section

After you create a section you have the opportunity to make another section by Cloning that section.

When creating multiple sections this feature enables you to create a series of sections with minimum effort. **When cloning – you need only input data that is DIFFERENT from the prior section.** The rest of the information is transferred from the initial section so leave the fields that remain the same blank.

You'll need to enter a **New Section ID**, and then make any adjustments if there are changes to: New Session, New Status, New Facility/Room, New Staff, New Days, New days, New Start Date, New End Date, New Start Time, New End Times.

After entering the Section ID, and any information that has **CHANGED** from the prior course section, click on OK to process or CANCEL to exit.

Now – check to see that the course and sections display on the web!

Why Courses Do Not Display in the WebReg Module – CHECKLIST:

The following is a checklist of the most common reasons a course section does not display the WebReg Module. If a course section does not display, print and review this checklist until you discover the reason and correct it.

- [] Does the Course have a Course Section?
- [] Is the Course Section set to Display Online = Yes?
- [] Is the Course Section field for Display Online Date set to a date in the future?
- [] Is the Course Section set to Display Cart Button = Yes? (This will not prevent display, but will prevent ability to purchase)
- [] Is the Maximum Enrollment for the Course Section set to a number value greater than zero?
- [] Is there at least one Fee set for the Course Section?
- [] Is the Fee set to a number value of zero or greater and set to Include In Balance = Yes, and select Account Number?
- [] Does the Fee have at least the Fee Group that matches the Default Fee Group as set in the Branch Profile?
- [] Does at least one Fee have a Revenue Item that matches the Default Revenue Item as set in the Branch Profile?
- [] In Session (Selects>Session) did you select “yes” for Display Course in Popup on the Add Session>Session Info. Page

If all the above items are checked, the Course Section should display in the WebReg Module.

Why a Course does not process in ScholarChip:

The most common reason a course does not process in ScholarChip are because the income account and Department codes are incorrect or not included.

Fees>Income Account and Course Sections>Departments must be filled out correctly to enable Scholar Chip to function.

COUNTBOOK

CountBook

Navigation: *Main Menu > Courses > Countbook*

Overview

CountBook allows the user to view immediate updated course offering information such as min/max, hand count, actual count, days of the week course is offered, start date, etc.

CountBook is designed to assist a user to view immediate enrollment and schedule information, especially when on the face-to-face or phone with a customer. Data cannot be added or edited from the CountBook.

Next, let's turn our attention to the SELECTS menus on the Main Menu.

The “SELECTS” Menus contain a substantial amount of information. When in doubt – check out the SELECTS menus – chances are your questions can be answered by searching alphabetically for a topic – i.e., facilities. It is most often where you create master lists that are later used in drop-down menus.

SELECTS A-D



[Selects A-D](#)

Exploring sub-menus that include: (Noete: Depending on your permission level, you may not see all categories)

Account Groups - Master list of account codes used for categorizing revenue and expense in Client Payments and all General Ledger records.

Accounts - Master list of Account numbers for a Branch. Used in Courses Sections, General Ledger (Client Payments), and Payroll.

Operation

To Add A New Account List Record

1. Click on the New button in the Toolbar.
2. Enter all the necessary account information.
3. Click OK to close and save.

Achievements - Master list of Achievements used to identify the outcomes of Client Goals.

Assessments - Master list of Assessments used to identify the evaluation results of Clients.

Attendance Codes - Master list of attendance codes used for tracking type of Client Attendance record such as absent, attended, etc.

Attendance Zone - Master list of Attendance Zones used in the Client Info / Other tab.

Block Types - Master list of Block Types in conjunction with Client Blocks.

Buildings - Master list of Buildings used in conjunction with Facilities and Rooms to identify locations for Courses.

Certificate Text - Certificate text allows the creation of text used to print certificates for Clients. The text entered in the Certificate Text records can be merged with Client and Course data to provide great flexibility in creating completion, award, participation, honor, and just about any type of certificate.

Certifications - Master list of Certifications used to identify Staff credentials.

Checklist Groups - Master list of Checklist Groups used to segment Master Checklist records.

Checklists - Master list of Checklist tasks or requirements used in Client Checklist.

CIP Codes - Master list of CIP Codes and descriptions used in primary Course Info.

Details

- CIP = Classification of Instructional Programs. The CIP is a taxonomic coding scheme that contains titles and descriptions of primarily postsecondary instructional programs.

Classifications - Master list of Classifications used to identify Client populations such as disabilities, testing modifications, or specific reporting groups.

Classifications Category - Master list of Classification Categories used to segment Classifications.

Client Infractions - Master list of Infractions used in Client Case Notes.

Client Interventions - Master list of Interventions used in Client Case Notes.

Client Penalties - Master list of Penalties used in Client Case Notes.

Comments - Master list of Comment expressions used in Client Progress/Grading.

Completion Codes - Master list of Completion Codes used in Client Assignments and Client Checklists.

Counties - Master list of Counties used in Client residency areas such as school districts and Client Residency.

Countries - Master list of Countries used in Client native country field and country field in ZIP Code records.

Course Activity Types - Master list of Activity Types used in Course Info.(i.e., certification, conference, etc.)

Course Categories - Master list of Categories used to identify and sort Courses. i.e., training
Details

- Category name field can not be duplicated in more than one record and is a required field.
- Category is used extensively as a search field option throughout ANCOR. With careful thought and preparation, the names entered in this Category list enhance the ability to sort and filter search results with greater efficiency and more useful flexibility.

Course Formats - Master list of Formats used to identify Courses. i.e., distance learning, classroom, etc.

Coursework Category - Master list of Categories used in Course Section Coursework.

Degree Types - Master list of Degree Types used in Courses to identify the degree, certificate or diploma obtained upon completion.

Departments - Master list of Department Names used in Course Sections to identify the responsible department or business unit.

Discounts - Master list of Discounts used during registration to reduce the amount due for a course section.

SELECTS E-M



[Selects E-M](#)

Exploring sub-menus that include:

Employment Cycles - Master list of Cycle descriptions used in Client Employment verification records.

Equipment - Master list of Equipment used in the Materials request section of Course Sections.

Ethnicity - Master list of Ethnic categories used in the Client Demographics section.

Facilities - Master list of facilities used in conjunction with Buildings and Rooms to identify locations for Courses.

Details

- Facility: Name field can not be duplicated in more than one record and is a required field.
- Facility Type: List is user defined. Field is required.
- Contact information is optional.
- Map URL: The URL to a website for mapping or to a map page on an organization's website. Used as a link in the WebReg module.
- Driving Directions: Step by step directions to the facility.

Facility Types - Master list of Type descriptions used in Facility records.

Family Structures - Master list of Family Structure values used in the Client Family Structure field.

Fee Groups - Master list of Group names used in Client memberships and Course Section Fees.

FTE Types - Master list of Type names used in identifying FTE reimbursement in Course Sections.

Funding Sources - Master list of Funding Sources used to track Clients, Courses, or Payments.
Details

- Status: Active or Inactive status of the funding source.
- Funding Source: Field cannot be duplicated in more than one record and is a required field.
- Agency Source: List is a user defined from the Sponsors table.
- Grant Status list is not user defined.
- Fund Category list is not user defined.
- Eligibility Criteria is for reference only and does not activate an automatic record entry in other areas such as Client.

Global Fees - List of Fees used to link with a Course Section in a bulk add process used in Course Section Fees or auto import into Client Invoices.

Goal Category - List of Categories used to segment Client Goals.

Goals - Master list of Goals used in Client Goals.

Grading Category - Master list of Categories used in Course Section Progress settings for grading segments such as attitude, projects, homework, etc.

Grading Codes - Master list of Grading crosswalk or legend for setting a range of numeric values for alpha grades.

Grading Ranks - Master list of Ranks used in the Grading Code legend.

Grading Scale - Master list of Scale comments such as Excellent, Above Average, Average, and Good used in the Grading Code legend.

Job Category - Master list of Job Categories used to identify placement types in the Client Registration Placements table.

Job Openings - Master list of Job Openings used to identify placement types in the Client Registration Placements table.

Job Titles - Master list of Job Titles used to identify personnel titles in Client Employment and Staff tables.

Languages - Master list of Languages in the Client record Native Language field.

Locations - Master list of locations consisting of a Facility, Building and Room, and used to identify locations for Courses.

Details

- Room Name/Number field can be duplicated in more than one record and is a required field.
- Facility and Building are user defined tables and required fields.
- Room Type is user defined and is a required field.

Marketing Sources - Master list of Marketing Sources used to track marketing efforts in Client and Client Assignment record How Heard fields.

SELECTS N-Z



[Selects N-Z](#)

Exploring sub-menus that include:

Name Prefixes - Master list of Name Prefixes used in records to identify the salutation such as Mr., Ms., Mrs., Dr., etc.

Payment Types – Master list of Payment methods used for revenue records in Client Payments, Transaction Report, and General Ledger.

Details

- Payment Type records cannot be deleted or added. However, user can change settings to display only the Payment Types desired.
- **If you change values after data entry has started, the change effects all prior data as well.**
- Balance Due: Identifies how a Payment Type is handled in Balance Due calculations. Payment Types tagged as "Include" are included in the balance due calculation. Payment Types tagged as "Exclude" are excluded in the balance due calculation.
- Order: Sort order desired to display in drop down lists.
- Display Option: Check to display payment type as an option.
- Display On-line: Check to display payment type as an option in the Web Registration module.
- Allow Refund: Check to enable display of the "R" refund button on a Client Payment transaction for the matching payment type.

Policies – Master list of Cancellation and Refund Policies.

Postal Codes - Master list of Postal Codes associated with City, State, and Country. Allowed length of postal code and address format throughout system is based on the Admin Menu > Settings > Branch Profile > Preferences field called Address method.

Program Groups - Master list of Program Groups used to categorize groups of Courses and/or Course Sections, and to set Course Sequences. Most often used to create a series of courses such as a certificate or degree program

Details

- Group Code and Group Title are required fields.
- Web Display: Display on Web Registration search page as separate search option.

Sequences

The Sequence feature provides the ability to create a list of all the required courses for a certificate or degree program and identify the general order they should be taken. As an example, think of this as all the courses required for a four year degree credit program and the order a student would take the courses. The Sequence would list all the courses required each of the four years.

There are two methods to sequences:

- The Course table contains a field called Sequence/Level
- To Add a Sequence to Program Group
- Go to Main Menu > Selects > Program Group and locate the Program Group desired.
- Click on the View button for the Program Group.
- Go to the Sequences tab while in view mode.
- Click the New button in the upper right of the Sequences window.
- Enter an Active Date for the sequence. Each Program Group can have numerous sequences but require an Active Date as the start date the sequence is considered active. The Active date cannot be repeated in another sequence for the same Program Group.
- Click OK to save sequence.
- Click on the View button for the Sequence date.
- Go to the Courses tab while in view mode.
- Click the New button in the upper right of the Courses window.
- Select a Course ID from the available list. Required field. A Course ID cannot be listed more than once in a sequence.
- Select a [Sequence Level](#) from the available list. Required field.
- Select a [Sequence Term](#) from the available list. Optional field.
- Select a [Sequence Type](#) from the available list. Optional field.
- Click OK to save sequence course.
- Continue to add courses to Sequence until complete.

How to Clone a Sequence

- Go to Main Menu > Selects > Program Group and locate the Program Group desired.
- Click on the View button for the Program Group.
- Go to the Sequences tab while in view mode.
- Click the View button for the desired Sequence.
- Click the Clone button in the toolbar.
- Enter an Active Date for the new sequence.
- Click OK to save the new sequence.
- The new Sequence is now an exact duplicate of the original Sequence.
- Modify the new Sequence as desired. Where enforced, Program Group Sequences are differentiated and enforced by their Active Date.

Refund Reasons - Master list of Refund/Discount Reasons used to identify payment records in General Ledger and Client Payment.

Revenue Items - Master list of Revenue Items used to identify the item purchased in revenue records of Client Payments and General Ledger.

Details

- Revenue Item is a required field.
- Type list is not user defined and is a required field.

Revenue Item Funding

Used in conjunction with the Client Invoicing process. Used to determine if the Client or the Funding Source pays the fees associated with registration.

- Funding Source: Required field. Cannot be used more than once per Revenue Item.
- Covers Difference: If checked Yes, Funding Source pays difference between regular and unsubsidized Fee fields.

•

Room Types - Master list of Type descriptions used in Location records.

School Contacts - List of names and contact information for personnel at Schools.

School Districts - aster list of School Districts used to categorize Home Schools and indirectly track the school district residency of Clients.

School Names - Master list of School locations used to track the school district residency of Clients.

Sequence Levels - Master list of Levels used in setting [Program Group Sequences](#).

Sequence Terms - Master list of Types used in setting [Program Group Sequences](#).

Sequence Types - Master list of Types used in setting [Program Group Sequences](#).

Sessions - Master list of Sessions used to identify periods of year when Courses are scheduled to run. Also used to identify the quarter periods of Progress Reports and Report Cards.

Session Info Tab

- **Session Name:** This is the name of the session. Can be alpha/numeric such as Fall2011. Spaces are allowed. The field cannot be duplicated in more than one record and is a required field.
- **Year:** Year session covers. Optional and for reference only. Does not affect any other field or function.
- **Display in Course Popup:** If Yes, determines if course sections tagged to this session will display in the Display Course Popup used throughout the system. If No, course sections do not display in the popup. More than one session can be tagged yes.
- **Sequence:** Order in which sessions are held. Optional and for reference only. Does not affect any other field or function.
- **Type:** Determines if session is a regular partial year session or the start/end of the full year. Optional and for reference only. Does not affect any other field or function.

Session Dates Tab

- **Start / End Dates:** The start and end dates of the session. Optional. Used also to determine certain functions when using the automated Client Invoicing functions.
- **Start /End Times:** The start and end times of the session. Optional and for reference only. Does not affect any other field or function.
- **Preregistration Start / End Dates:** The start and end dates of the session's Preregistration period. Optional. Used also to determine display of certain functions in Client and Client Assignment if registration is restricted to certain dates only.
- **Registration Start / End Dates:** The start and end dates of the session's Registration period. Optional. Used also to determine display of certain functions in Client and Client Assignment if registration is restricted to certain dates only.
- **Drop/Add Start / End Dates:** The start and end dates of the session's Drop/Add period. Optional. Used also to determine display of certain functions in Client Assignment if registration modifications are restricted to certain dates only.
- **Orientation Date:** The orientation date for the session. Optional and for reference only. Does not affect any other field or function.
- **Roster/Grades Due Date:** The date when attendance and grades are due for the session. Optional. Used also to determine access to Admin Men functions for Add Grades and Exit Assignments if registration modifications are restricted.

Withdraw Info Tab

- **Dates:** The dates determining refund amounts for the session for dropped registrations. Optional and for reference only. Does not affect any other field or function.
- **Percent:** The percentage of refund amounts for the session for dropped registrations. Optional and for reference only. Does not affect any other field or function.

Web/Other Tab

- **Display Online:** This field is used in conjunction with the Client Web Registration module. If the Display Online field is checked Yes, all course sections checked as Display Online will appear in the course lists of the Web Registration module.
- **Display Cart:** This field is used in conjunction with the Client Web Registration module. If the Display Cart field is checked Yes, all course sections checked as Display Online and Display Cart will display the cart button in the course detail page of the Web Registration module.
- **Brochures Mailed:** The total number of course catalogs/brochures mailed for this session. Optional and for reference only. Does not affect any other field or function.
- **Brochures Distributed:** The total number of course catalogs/brochures distributed for this session. Optional and for reference only. Does not affect any other field or function.

Sponsor Types - Master list of Type descriptions used in Sponsor records.

Sponsors - List of firms and companies used in a variety of areas including Funding Sources, Client Sponsors, Client Payments, Textbook Vendors, and Employers. Any field select list that refers to a firm or company name in anyway is derived from this user defined list.

Staff - List of personnel associated with the organization such as instructors, counselors, clerical staff, and administrators. Any field select list that refers to staff is derived from this user defined list.

States – Master list of states.

Status Codes - Master list of Status Codes used in Client Assignments and Client Checklists.

Termination Reasons - Master list of Termination Reasons used to identify Client Intake/Exit, Client Employment, and Assignment exit reasons.

Test Types - Master list of Test Type names used directly in Tests List and indirectly in Client Testing.

Tests List - Master list of Test Names used in Client Testing.

Textbooks - List of Textbooks available for sale and used in Courses.

Details

- Textbook name field cannot be duplicated in more than one record and is a required field.
- Vendor list is user defined from the Sponsor table.
- **Inventory Tab:** Log of inventory dates and quantities of the current Textbook record. Inventory tab displays only when in View Mode of Textbooks.

Transportation Zone - Master list of Transportation Zones used in the Client Info./Other tab.

Work Areas - List of Work Areas used for identifying content areas Staff are qualified to or are available to work in.

How to Search and Register Students (Clients) who Call, Mail or Walk-in their Registrations

Student (Client) Registration – Entering and Locating Student Data

Clicking on **Main Menu** on the tool creates a menu with a list of functions on the left side of the screen. The Main Menu contains the submenu options for most all data entry as seen below. Click on the respective folders icon to display the available options.

CLIENTS



Clients - Menu - To obtain specific information on a topic listed, click on the folder – (i.e., “Clients”) and a drop down submenu appears. (Depending on your permission level, you may not see all the categories listed below in your submenu.)

Submenu - For assistance on categories in the submenus – click on a topic – (i.e., “Client Info.”) and then click on “Help” in the toolbar.

Client Info – Client Info records basic pertinent information for one client.

Attendance - Allows user to enter attendance for every client assigned to a course or for one individual client in one assignment.

Case Notes - Allows user to record an unlimited number of case notes for individual clients. Note: Case Notes are accessible through the Main Menu > Clients as well as in Client view.

Coursework - Allows user to view all course work entries for all clients and add new course work entries for an individual client. Master coursework records should be created in view mode of a Course Section before adding Client Course Work records.

Employment - Allows user to record unlimited Employment records for Client. Both pre-employment and post-employment can be recorded.

Goals/Achievements - Allows user to record an unlimited number of Goals and Achievements for a client.

Progress/Grading - Allows user to view, add, edit, and delete client progress reports and report cards.

Skills Profile - The Skills Profile section allows a user to create a profile of identified skills for a client and rank each of the skills up to five times with a user defined ranking scale.

SEARCHING FOR A CLIENT RECORD:

Navigation Menu: *Main Menu > Clients > Client Info*

Searching for a Client Record:

1. On the **Main Menu** – double click on the word **Clients** and a drop down menu appears. Click on **Client Info**. Enter the client’s first and last name (or course code, etc.) and then hit the **Search** button located on the right of the screen.

Using Client Info Page: this provides a more comprehensive search then Quick Search – and is the preferred method if the only information you have is a name.

The **Clients** screen includes ID info., as well as Address/Phone, School Information, Assignment Status, etc.

ADDING A NEW CLIENT RECORD:

Overview

Client Info records basic pertinent information for one client. ANCOR uses the term "Client" to identify students, participants, trainees, or whatever definition your organization uses to identify your customers. You may not collect all the data listed below.

Operation

To Add A New Client Record

1. Click on the New button in the light blue Toolbar.
2. The add Client Info pop up window will appear.
3. Complete the required fields. A red * is placed alongside each required field. Required fields are: Last Name, First Name, Branch/Share, Client Type (i.e., individual or corporate). The client ID number is auto generated.
4. You can also include any additional info. you may have – including marketing info. such as how the client heard about the course found in Intake/Exit – How Heard.
5. Click OK to close and save the record when done.
6. Clicking on OK brings you to the INFO tab screen.

Info Tab Screen

- Client ID's are Auto Generated (required). Client IDs cannot be duplicated for more than one record.
- Name, Residence and Mailing Address, Contact Info, etc.
- Enables you to review the information.
- If you need to edit anything, hit the EDIT button on the light blue toolbar above the Info screen.
- Remember to click on OK after making changes, or your new data will not be saved.

Profile/Intake-Exit Tab

Navigation Menu: *Main Menu >> Clients >> Client Info (view + Profile >> Intake/Exit)*

Overview

Allows user to record and track additional client profile data related to Intake and Exit.

Note: These fields were previously part of the Client Info section prior to 1/25/12.

- How Heard: Determines how client heard about the program. List pulls from Marketing Sources. This field differs from the "How Heard" field in Assignment where "How Heard" refers to each individual Assignment versus the overall program organization as it does here.
- Referred By: Referral source. List pulls from user defined Sponsor table.
- Previous Year: Was client enrolled with your organization last year? Yes/No checkbox
- History: Text field listing program years client was enrolled in programs such as 03-04, 04-05, 05-06.
- Termination Date: Date of final termination when client will no longer be enrolled in ANY program. This date may or may not be the same as an end date for a specific assignment.
- Re-Entry Date: If client was terminated and returned in the same program year, the date of return. Clear out the termination information and client remains enrolled. You may desire to make a notation in the Client Case Notes of these details. If the return is in a different year, client should be considered as reenrolled.

- Carry Over: Should client be carried over into next program year? Yes/No checkbox. This is one of several options for carrying data forward into the next program year.

To Add A New Corporate Client Record

1. Click on the New Corporate button in the Toolbar.
2. The Client Info pop up window will appear.
3. Complete the necessary fields on the Client Info tab. The fields are the same as when using the New Client button except any required fields which are not relevant to a corporate client such as gender are not required.
4. Click the next tab.
5. Click OK to close and save the record when done

Exploring the Grey Tabs

Look across the top of the Info Tab Screen – you will see grey boxes that list additional tabs that include:

Registration (to add an assignment a.k.a. - course).

Remaining tabs are not applicable to all programs: Profile (classification, eligibility, intake/exit, assessment, funding and Fee Group) , **Outcomes** (goals & achievements, etc.), **Family** (relationship & contact info.), **Case Notes** (info. on client & follow-up), **Checklist** (activities & dates), **Documents** (title, file, etc.), **Blocks** (blocks registration), **Members** (adds relatives, co-workers, etc. associated with this account. Each member must create own initial account)

Note about Blocks: Once a client is put on hold from two branches then no other branch can accept registrations from this individual until the problem(s) is resolved. An example of a reason for a block: A student who has an invoice exceeding 120 days should automatically be placed on block. To determine what if any students have invoices exceeding 120 days, it is necessary to run Aged Invoices reports.

Tool Bar Functions - Located on light blue background directly above grey tabs. (Some are self-explanatory)

- **Search** (brings back to main screen to search by various methods), **New** (creates new client), **Edit** (used to edit client Info.) **Delete**, **Refresh**, **Add Assignments** (used when registering client for multiple classes), **Class Schedule**, **Balances Due** (Previews report of all registration Assignments and the payments balance due), **Credits on Account**, (A list of all transactions tagged as Credit Given and Credit Used), and **Transcript**.

Putting this information to use:

EXAMPLE: Using SEARCHES to REGISTER a client for an ASSIGNMENT.

Situation: A prospective client calls you because he/she is interested in registering for a course.

To REGISTER a Client for a course he/she is calling about – first let’s search to see if they already have a client record.

Searching for Client Records:

1. On the **Main Menu** – double click on the word **Clients** and a drop down menu appears. Click on **Client Info**. Enter the client’s first and last name in the fields provided and then hit the **Search** button located on the right of the screen.

If he/she already is in the system then you will next:

(If he/she is not in the system then you will need to first create a new client record. Refer to Page 32.)

ADDING SINGLE AND MULTIPLE ASSIGNMENTS

To REGISTER a client for a SINGLE ASSIGNMENT click on:

Registration - located in a gray box on the screen

To add a course or in ANCOR vocabulary **ASSIGNMENT**, click on the box labeled **NEW**, located on the far right of the cream colored screen. (Next to the word “Assignment.”)

An **ADD ASSIGNMENT** PopUp window appears requesting the **Course Code**.

If you already know the course code input it in the designated slot. If you don’t know the complete course code, click on the viewer (sheet of paper) icon. The viewer icon creates a menu of courses. Click on the course the client requests. If you have an idea of the first three or four letters/numbers of the course, type those in and then click on the viewer icon. The course search will sort those course titles that most closely match those letters/numbers you entered.

Next, press **Entry Info.** - a new window appears.

Enrollment Status* is a required field. It is a drop down field where you find all potential enrollment statuses – from Applicant/Wait List to Did Not Enroll Course Cancelled. This is the screen and field you will use if the client’s enrollment status changes. i.e., was on Wait List and is now Enrolled/Active. Enrolled/Active denotes that a student is registered for a class.

Review the other gray tabs (Exit Info Grade/Outcomes and Other/Notes). These do not pertain to initial enrollment, except for Other/Notes section that can contain information if the client has special needs – i.e., note taker for class, etc.

Click on **OK** located at top of screen. This will then change back to the client screen showing that the course has been “assigned” or registered.

Explaining New Icons: Pencil, and \$ Symbols

You’ll notice that in addition to the course (or assignment) appearing on screen new icons appear. The **Pencil** denotes the ability to edit a record – click on this and you can change information on the record.

The **\$** icon enables you to log client payment information. Client payments include **NEW**, and **MULTIPLE** (using more than one payment method). Explained in **TAKING A PAYMENT FOR AN INVOICE SECTION**.

Explaining Go To drop down menu:

The **Go to** Box provides the menu to choose where you would like to go next:

Invoice

Print Registration

Print Session Schedule

Note: A **HELP** button located on the light blue toolbar is also there to assist with questions and can used throughout the different navigation screens.

When registering a student, the system automatically issues an invoice number.

To REGISTER this client for the MULTIPLE ASSIGNMENTS click on:

Registration - located in a gray box on the screen

To add a course or in ANCOR vocabulary **ASSIGNMENT**, click on the box labeled **MULTIPLE**, located on the far right of the ecru colored screen. (Next to the word “Assignment.”) If you know the course codes including the sections you can input that information in the tabs provided. If you have some information, such as the beginning of the course code you can begin entering that information then click on the view feature (it looks like a sheet of paper) located to the right of the tab. That will produce a listing of courses that have those beginning letters or numbers you have entered. Select the correct course and section from the list. If you do not see the correct course, you will need to locate the correct course code. You may do this by performing a search for Courses.

Note: When registering clients for multiple assignments, all courses must have a single fee. Courses such as conferences that may have several fee options (meals, books, accommodations, etc.) must be registered as a single assignment. Multiple assignments auto generate one invoice.

(Alternatively, you can add multiple assignments by clicking on **Add Assignments** on the light blue toolbar.)

SEARCHING FOR A COURSE:

Navigation Menu: *Main Menu > Courses > Courses*

Searching for a Course:

The same basic principles you used when searching for a client applies to searching for a course. Enter as much information as you have in the Search Criteria Fields and then click on **Search**

PART FOUR FINANCIALS IN ANCOR

INVOICES, CREDITS & REFUNDS, DEPOSITS, EXPENSES, GENERAL LEDGER

INVOICES:

Navigation Menu: *Main Menu>Client>Client Info>Registration>*

After an assignment(s) is created an invoice is auto generated. To view the invoice, use the drop down menu located on the top left side of the cream screen and click on **Invoices**. This will show you all the invoices assigned to the client. It includes information on amounts due as well as payment information. In addition, on the blue tool bar you will see the Balance Due for a client, as well as if he/she has any money On Account.

Clicking on the invoice number brings you to a new screen that lists the line items associated with that particular invoice. You can also create new line items on this invoice (use New button) or edit (using the pencil icon) existing ones.

Clicking on the light blue **Invoice** tab and then clicking on the edit button located right above it enables you to edit information and include **Sponsor, Funding, Purchase Order** and **Notes** information.

Note: You cannot delete an invoice from this screen once a payment has been made.

PROCESS: *Assignment>Invoice>Payment*

TAKING A PAYMENT FOR AN INVOICE:

Navigation Menu: *Main Menu>Client>Client Info>Registration*

There are several ways to take a payment for an invoice

If you are on the Assignment screen and have created an assignment:

The invoice has been auto generated. Click on the \$ sign. That brings you to the **Add Client Payment** screen. You'll see that the Client Invoice Number has been auto generated. Next, click on the gray **Transaction** tab. On the Transaction tab complete the following **required** information:

Payment Type (Check, and various credit cards)

Revenue Item (Tuition, accommodations, meals, etc.)

Amount (Insert dollar amount)

There are also fields for Check Numbers, and a variety of other fields (refunds, notes, deposit dates, etc.).

Payment Types

If the client is paying by personal check complete the required information on the **Transaction** tab and then click on OK.

If the client is paying by company check, then complete the required information on the **Transaction** tab and then click on the **Payee/Billing** tab and complete the Sponsor and contact information. Additional fields may be completed as well.

If the client is paying by a purchase order, after the assignment is completed, click on OK. Then use the drop down menus to go to the Invoice screen. Click on the Edit (pencil) icon. Edit the invoice by completing the sponsor (previously set up in the Main>Selects>Sponsors) and purchase number as well as any other notes.

To accept a payment use the drop down menus to select Payment. The Add Client Payment screen appears. The client invoice number is auto generated. Click on the Transaction tab. Complete the required fields: Payment Type, Revenue Item, Amount.

Next, click on the gray Payee/Billing tab. Indicate to whom the receipt is being issued (it can be issued to either the client or the payee). Select the Sponsor information from the drop down menu. Complete all address, phone, email, Sponsor Invoice number, and Date information. Click on OK.

If the client is paying by credit card: Once you indicate that the client is paying by credit card the ANCOR system will then send you over to ScholarChip (the portal for paying by credit card) to process the payment. There is no need to enter credit card information on the ANCOR screen.

1. Click New in payments or Add payment from an Invoice Go to... or Click the "\$" on an existing payment for an invoice if you need to add another payment.
2. Make sure it is the correct Invoice number.
3. Go to Transaction Tab and Select a Payment Type of Visa, MC, or any of the Credit cards that you are accepting.
4. Enter an amount.
5. If you want to record a different person or Company that is paying go to the Payee/Billing tab to enter Sponsor and/or Contact Person.
6. No other fields need to be filled out at this time.
7. Click OK and you will be connected with ScholarChip.

8. Complete the transaction.
9. ScholarChip will send you back and the payment record will automatically be entered into XenDirect (ANCOR).
10. You will be given a prompt telling you that the Process is complete.
11. Click OK and the page will refresh and the widow will close.

If you are on the client Invoice screen (located on upper left side of client screen in drop down menu)

Single payment: use the **Go To** drop down menu and click on **Add Payment**. Complete the Add Client Payment screen.

For Multiple Payments: use the **Go To** drop down menu and click on **Add Payment**. Complete the Add Client Payment screen. For the next payment type, complete the Add Payment functions indicating the different payment type.

From Assignment on the upper left drop down: Click on the \$ icon - that will bring you to the Add Client Payment screen.

Note: After a payment is taken the balance due amount changes. You'll see that amount change in the dark blue tool bar by the client's name. If the amount does not change automatically, click on the Refresh button located on the light blue tool bar.

CREATING AN INVOICE MANUALLY:

Navigation Menu: *Main Menu>Accounting>Invoice*

After an assignment (single or multiple) is created an invoice is automatically generated.

If, however, you need to need to create an invoice manually after adding an assignment, click on **Invoice** in the Accounting Sub Menu. That will bring you to an add **Invoice** screen. You must input the **Client ID number** and then hit the **Invoice** tab. The system will auto generate an invoice number and default to the current date. You must fill out the required information: invoice status from the drop down menu (Active, Released, Voided). You can also enter any notes and the click on OK.

This field is also where you note the **Funding Source**, **Sponsor**, **Purchase Order** number and any **Notes**. Follow Taking a Payment on an Invoice procedures.

CHANGE FROM WAITLIST TO ENROLLED:

Navigation Menu: *Main Menu>Client>Client Info>Registration>*

When seats become available in a section that previously was filled, in accordance with your branch policies, reach out to the client to see if he/she still is interested in taking the course. If the individual indicates that he/she wants to enroll the course, you must first change their enrollment status from Wait List to Active/Enrolled on the Client Info screen. You accomplish that be editing (using the pencil icon) on the client record, and changing his/her Enrollment Status to Enrolled/Active, which will create an invoice (no invoice is created when a client is on a waitlist). Follow Taking a Payment on an Invoice procedures.

THIRD PARTY INVOICE: Note: Sponsor Information must first be entered in
Main>Selects>Sponsors

Navigation Menu: *Main Menu>Client>Client Info>Registration>*

After an assignment has been made click on the \$ icon from the Assignment screen, or use the upper left hand corner drop down and select Payment.

The Add Client Payment screen appears. The client invoice number is auto generated. Click on the Transaction tab. Complete the required fields: Payment Type, Revenue Item, Amount.

Next, click on the gray Payee/Billing tab. Indicate to whom the receipt is being issued (it can be issued to either the client and the payee). Select the Sponsor information from the drop down menu. Complete all address, phone, email, funding source, Sponsor Invoice number, and Date information. Click on OK.

RECREATING INVOICES IN ANCOR:

Navigation Menu: *Main Menu>Course>Course>Registration>Auto Invoice>Line Item*

This information is for units with clients having outstanding invoices. Financial information is not brought over to ANCOR, therefore, you must manually create invoices for any outstanding financials.

Here is the process:

On the Main Menu select Courses and then Courses on the drop down. This brings you to the Courses search criteria field.

Enter the Course ID information in the tab provided.

Click on the Search button.

Click on the course you wish to examine.

Click on the Sections button.

Click on Enrollment from the drop down menu located to on the far right of the screen.

Select a client.

Click on the Registration button.

Select Invoices from the drop down menu located on the upper left of the screen.

Click on the Auto Invoice button located on the upper right side of the cream screen.

Select the Course ID from the drop down menu.

Click on OK.

Click on the view button (the sheet of paper icon) located next to this new assignment.

Select Line Items NEW.

Select Tuition in the Item field from the drop down menu.

DO NOT select an option from the Course Code drop down menu.

Enter 1 in the Quantity field.

Enter Course fee in the Rate field.

Enter “Transferred from _____ system (whatever database system you were previously using – i.e., CERKit) into Notes field.

Click on OK button.

If you wish to print this invoice go to the Invoices screen and select Print Invoice from the drop down menu located to the far right of the invoice. You can print or save the invoice to PDF.

CREDITS AND REFUNDS:

Navigation Menu: *Main Menu>Client>Client Info>Registration>Invoices*

Overview:

The process of issuing a refund is as follows: first an assignment is made, then an invoice is created, then an invoice is paid, then a credit is issued, and then a refund is issued. Credit = fees paid by client that are being used for either another course or a refund.

Note about credit card refunds:

After a student registers and submits a payment through ScholarChip and requests a refund you must take that ScholarChip transaction number and amount and check it against ANCOR. Once a refund is processed through Scholarchip, you must return to ANCOR and update the client financial record to reflect refund has been issued.

INITIAL PROCESS: Assignment made> then Invoice created> Then payment taken.

NEXT STEPS: Then either:

1. Credit/Refund is issued

OR

2. Credit is Given/Credit is Used.

Issuing Credit/Refund: This is a two-step process. First a credit is issued, then a refund is issued.

On the Client Registration>Invoices screen, use the drop down menu on the right side of the screen (located next to the invoice you wish to credit) and select Credit/Refund. The Add Credit/Refund Record screen appears. You must first issue a credit. Select Credit. Type in the credit amount. Select the reason (i.e., course cancelled), and then click on Submit. Then click on Close when this prompt appears.

Next, you must issue a refund. (After issuing the credit, the system sends you back to the Assignment screen. You must click on Invoices on the upper left of the screen to take you back to the correct screen to complete the refund.)

On the Invoices screen associated with the client record, select Credit/Refund from the drop down menu associated with the invoice you wish to refund. Select Refund. Include the refund amount. Select the reason for refund. Select the Refund Pay Type. Next, click on close when that prompt appears.

An alternate way to accomplish Issuing Credit: Pull up the client's record. Click on the Registration tab. On the Assignment screen change the client's enrollment status from enrolled to "Did Not Enroll – Course Cancelled," or whatever explanation fits the situation, by using the edit (pencil) feature and click on OK. A new screen will appear asking Do you want to automatically issue Given Credit to this Client for this dropped course? Click OK to process or CANCEL to exit. Hit the Refresh button on the light blue toolbar. The money is now recorded in red in the "On Account" section located on the dark blue toolbar after the client's name. If a refund needs to be issued then complete the refund process as explained above.

Note: Refunds are issued in the same manner payment is accepted. For example, if the client paid by check, a check is issued. If the client paid by credit card, you must enter all this information in ANCOR, and then complete the transaction by issuing a refund to the credit card through ScholarChip. **To issue a credit card refund, login to ScholarChip via the ANCOR home page at ANCOR.rutgers.edu.**

Issuing Credit/Credit Given: Use then when a student is not being issued a refund – but rather issued a credit to their account in accordance with your cancellation/refund policies.

On the Client Registration screen select Payment from the drop down menu located on the upper left of the screen. Click on the New button on the right side of the cream screen. On the Add Client Payment pop up in the Transaction tab select **Credit Given** in the required Payment Type

field. Fill out the remaining required fields of Revenue Item and Amount. Credit Given appears as “On Account” on the blue tool bar of the student record.

Using Credit/Credit Used:

After a Credit Given has been applied to a student account, University policy states that that money can be held for up to 90 days. During that time a student may register for a new course. When the student registers for the new course you apply the credit towards the fee for the new course. Here’s how: On the Client Registration screen select Payment from the drop down menu located on the upper left of the screen. Click on the New button. On the Add Client Payment pop up in the Transaction tab select **Credit Used** in the required Payment Type field. Fill out the remaining required fields of Revenue Item, Amount.

Transferring Credit:

Client>Registration>Go To> Select **Credit Transfer** option. You’ll need to know the invoice number that you wish to apply the credit towards. Include the invoice you are transferring the money from, and the invoice number you are transferring the credit to.

Additionally, you can use the Auto Use Credit function that will add money and take money to pay it against outstanding balances. If you disable this function using “No”, ANCOR will give credit but won’t use it immediately.

CREATE A PREPAY/OVERPAYMENT INVOICE:

Navigation Menu: *Main Menu>Client>Client Info>Registration>Invoice>Line Item*

Here is the process:

- Create an invoice
- Take a payment on that invoice
- Issue credit to that invoice, and then
- Issue a refund or transfer credit
- You must first issue a credit prior to issuing a refund in accordance with your branch’s refund and cancellation policies.

Go to the Client Invoice Screen – add a New line item manually to create an prepayment or an overpayment. On the Add Line Item screen complete the required fields are: Item (using the user - defined drop down menu), Quantity (1), Rate (Dollar amount of pre or overpayment), and Extension (0.00).

Next, take a payment on the invoice by navigating using the drop down menu located on the upper left side of the screen. Once the payment information has been completed click OK. Then use the drop down menu on the right side of the screen that is located next to the invoice you wish to credit and select Credit/Refund. The Add Credit/Refund Record screen appears. The Add Credit/Refund Record screen will issue a credit or refund to this invoice. Select from the options. Complete the required fields of Credit/Refund and the amount and click Submit. (Note: You must first issue a credit, and then you may issue a refund.)

Now, to take a transfer payment on a prepay/overpayment invoice:

Client>Registration>Go To> Select **Credit Transfer** option. You’ll need to know the invoice numbers that you wish to apply the credit towards. Include the invoice you are transferring the money from and the invoice number you are transferring the credit to.

Additionally, you can use the Auto Use Credit function that will add money and take money to pay it against outstanding balances. If you disable this function using “No”, ANCOR will give credit but won’t use it immediately.

To WITHDRAW a client from an assignment – (Provided it meets the refund cancellation policies)

Typically you will edit the assignment and change the enrollment status to something other than Enrolled/Active. Typically one of the Did Not Complete or Did not Enroll statuses depending on the situation.

Next, you will give them a Credit back to their Invoice. Per university guidelines (consult ANCOR web page POLICIES) a unit may not hold funds for more than 90 business days.

To cancel an ENTIRE SECTION, or MULTIPLE SECTION of a course:

ADMIN Menu>Course Functions>Cancel Section

Select one or more Course Codes and set all options as desired. It allows you to cancel up to five sections of a course at one time. It also changes the enrollment status of all students enrolled in those canceled sections to “Did Not Enroll – Course Cancelled” or another reason available on the drop down menu.

Send e-mail notifications:

It also enables you to send an e-mail to all students advising them that the course has been cancelled. In order to accomplish this, you must FIRST create a letter in the Marketing section located on the Reports menu (REPORTS>Marketing>Create Merge Text) and include the word “Cancel” in the title of the letter. For example, you could call the letter simply “Cancel Letter.”

Update Financial Options:

This feature enables you to add a credit transactions to all students enrolled in the course.



ACCOUNTING

The Rutgers accounting system is designed as a three-pronged approach reconciling financial data.

These three things that must be reconciled:

1. **ANCOR**
2. **ScholarChip**
3. **RIAS**

Note: You’ll need to check ScholarChip payments against what is listed in ANCOR and update that information on the Student Records Account.

Exploring additional sub-menus that include: Deposits, Expenses & General Ledger



[Accounting](#)

Deposits

Navigation Menu: *Main Menu > Accounting > Deposits*

Overview

Allows user to review, edit, and delete Client Payment transactions.

Operation

Deposits: Procedure

1. **The report will show checks attached to the invoices.**
2. **Print the Closeout Deposit report and reconcile the data.**
3. **Click on Closeout Deposit.**

To Make a New Deposit

1. When the page is opened, only transactions that do not have a deposit date are displayed.
2. Review the transactions on the screen or run a Review Report using the Preview Report button. Do not select a date using the Previous Deposit field.
3. Review the results and make changes as necessary by adding, editing or deleting transactions.
4. Once satisfied that the deposit is correct, click the Closeout Deposit tool bar option. A window will popup with the following options:
 1. Date Format: Select the date which will be used to enter into the deposit date field.
 2. Cashier: Select the user name to update only the transactions entered by this user. Optional.
 3. Department: Select the department name to update only the transactions where the Course Section is tagged to the same Department. Optional.
 4. Facility: Select the facility name to update only the transactions where the transaction is tagged to the same Facility. Optional.
 5. Click RUN to proceed or Cancel to quit. All transactions without a deposit date will now be updated based on the selections.

To View a Previous Deposit

1. When the page is opened, only transactions that do not have a deposit date are displayed.
 2. Select any Search and Report Options as desired.
 3. Select a Previous Deposit Date using the Previous Deposit field select list.
 4. Click the Preview Report button.
-

Tool Bar Functions

- Refresh: Refresh the data on the current screen
- Closeout Deposit: Update all transactions without a deposit date to the current date and time and print deposit report
- Help: Launch the On-Line Help files in a new window

Expenses

Navigation Menu: *Main Menu > Accounting > Expenses*

Overview

Allows user to add and edit expense transactions as part of the General Ledger table. Expenses can include salaries, food and coffee, and various miscellaneous expenses.

Tracking expenses is critical in compiling accurate profit/loss data concerning courses and sections.

Operation

To Add an Expense

1. Click the New Expense Button.
 2. Enter a course code.
 3. Click the Ledger Tab.
 4. Enter all the necessary account information.
 5. Click OK to close and save.
-

Details

- Account: Account number or name. (from Accounts table) Required field. User defined.
- Details: Details about Expense transaction.
- Vendor: Vendor name. (from Sponsor table) User defined.
- Amount: Amount of expense. Must be numeric value. Required field.
- Cleared: Has the transaction entry cleared the books.
- Memo: Additional information regarding expense transaction.

General Ledger (Transaction Report also yields the same data)

Navigation Menu: *Main Menu > Accounting > General Ledger*

Overview

The main table for all financial transactions – both expenses and payments. All accounting areas are integrated into the General Ledger table.

Details

See the following areas for data field details:

- Accounts Receivable
- Deposits
- Revenue
- Expenses

PART FIVE

Running Reports in ANCOR

EXPLORING MENUS in REPORTS and NAVIGATING THE SYSTEM

Attendance, Clients, Courses, Financial, Government, Marketing, Outcomes, Personnel, System

**** Denotes most commonly used**

Reports Menu

Exploring sub-menus that include:

Daily Attendance, Enrollment Counts, Enrollment List, Rosters

The **Report Menu** contains submenus for all reports and e-mail functions including the ability to export reports.

Attendance



[Attendance](#)

Navigation: *Report Menu > Attendance*
Attendance, Assignments, and Enrollments

Overview

Group of reports related to attendance, assignments, and enrollments.

Daily Attendance

Detailed and summary options for printing daily attendance.

- Ignore Residency: If No, all clients are included despite Residency records. If Yes, only clients with a Residency record tagged as "Academics" and active for the current date are included.
- Define Date Search: Defines what fields the Date Search searches on.
- Define Number Search: Defines what fields the Number Search searches on.
- When Define Number Search is selected as "Number of Absences", the filter searches on the total number of absences per client per course regardless of any date or range of dates filter.
- Display District Counselor: If Yes, enables display of residency record Counselor, job title, and phone number.

**** Enrollment Counts**

Quick enrollment counts per course. In number format not name.

- Blank template: Prints report with header data only and without client and assignment data.
- Basic Counts template: Count column includes all registrations as filtered using the Enrollment Status search field.
- Monthly Counts template: Start date of the 12 month range from the search screen Course Start Date start. If blank, uses default Branch Program Year Start Date.
- Unduplicated Counts template: Calculates an unduplicated client count based on the Group By report option. Only the Alternate Title and Group By report options are used in this report. Other report options are ignore.

**** Enrollment List**

Course Enrollment Lists or Waiting Lists. Lists names of clients enrolled in courses. Serves as ROSTER. Job Titles are also included on this list if filled in by user.

Report Options:

- When Template = Waitlist, subgroup order is first by waitlist date and time, then secondly by client name.
- **WAITLIST: Print waitlist reports by assignment. Process for waitlist: go down list and contact individual's by day and time stamp.**
- When Template = CEU, CPE, or Credit:
 - Hours, Days, and Grade fields only display if group By = Course Code.
 - Credit will display as Earned when Enrollment Status = any status starting with "C".
 - Credit will display as Declined when Enrollment Status = any status starting with "D".

- Credit will display as Pending when Enrollment Status = any status starting with "E" or "A".
- When Template = Fee Options, the following Report Options are not used: Course Header, Display Details.
- Note that every Report Option is not used with every report template.
- Name Tag templates use the following Avery formats. Note that font size is set for most first name lengths but may cut off first names longer than 18-20 characters.
 - Name Tag 1 = Avery 2-1/3" X 3-3/8" adhesive name tag format.
 - Name Tag 2 = Avery 2" X 4" adhesive name tag format.
- Name Tags:
 - Alternate Title: If report option is used, replaces Organization Name in the name tag header.
 - Display Details: If report option = Details, Course Title will appear below last name.
- Session Exclude: If not blank, the report will include all searched Clients that do not have an Assignment for the Excluded Session. This report option works for all the templates except the Over Enrolled template.

**** Rosters**

Attendance rosters used to collect attendance data. **Blank data fields are filled in by instructors.**

- Report Date: Required. Enter a date for the report to be run. This date will determine which clients are listed and what dates display on the report. Clients will display if they have an active assignment during the dates of the report using their Assignment start and end dates. If a client is not active during the dates chosen for a report, they will not display. Default date is current date.
- Blank Roster: Yes/No option to print the report without client names and with a blank grid under the course header. This option is not valid for Daily Scan and Weekly Scan.
- Filter By: Select between filtering active clients based on Assignment Dates, Assignment Status, or Ignore both (default).
 - Dates: Using the Report Option Report Date, roster will include clients based on their Assignment Start and End Dates. If the Report Date is blank, it defaults to current date. Enrollment Status is ignored.
 - Status: Include active clients with active including these status = "Enrolled/Active", "Enrolled/Hold" and "Approved Visitor". Dates are ignored
 - Ignore: Option ignores both Assignment Dates and Assignment Enrollment Status.
- Scan roster templates have various L (left) and T (top) margin settings. The user may have to test print the templates to determine which template aligns correctly for the printer being used.
- The following three display options will change the report row height based on the options chosen and may cause rows to wrap to more pages. These options are ignored for Monthly, Daily Scan, and Weekly Scan. (a) Display Phone Numbers, (b) Display Residency, (c) Display Roster Notes.
- Number of Classes Roster Template: This roster template looks up the Total Number of Classes for each class and selects to display either 4, 8, 12, or 18 columns. If Total Number of Classes is not set or is zero, 18 columns display.
- Quantity: If a Corporate client has a Quantity greater than one in the Assignment record, the Quantity will appear after the name in the roster as (##) such as (7).

CLIENTS



[Clients](#)

CLIENT REPORTS

Navigation: *Report Menu > Clients*

Overview

Group of reports entirely related to clients including schedules, certificates, labels, and more.

Case Notes

Client case notes reporting.

- **Course Search Option:** Because a Course Code can exist in Case Notes based on an Assignment or a Course Code in the actual Case Note record, if you use a Course Code, Course ID, Section ID, date restriction, Session, Activity Type, Period, or Course Status search field, you must determine which course is referenced. The default is the Course associated with the Case Note.
- **Staff Search Option:** Because a Staff record exist in Case Notes based on the staff record associated with an Assignment, Course Code in the Case Note record, or Staff in the Case Note record, if you use the Staff search field, you must determine which staff is referenced. The default is the Staff associated with the Case Note staff field.
- **Restrict Dates:** Restrict Case Notes based on the Case Note date to within the start and end dates of the Course Section. See Course Search above.

Certificates

Print certificates, honors, and awards using pre-bordered certificate paper or blank paper.

- **Certificate Name:** Pull from Certificate Text select list.
- See Guidelines on ANCOR homepage for policies around certificates.

Classifications

Client classifications reporting.

- **Exclude Blanks:** Use this special filter to include or exclude records based on Client records that have or do not have Classification records.
- **Display Medical Alerts** is disabled when Group By = Classifications.

** Client Lists – Alpha list of clients with contact information.

A variety of Client List templates.

- **Alert List:** List of Client address, email, and phone contact information along with parent/guardian and medical/allergy alerts from Client Info.
- **Blocked List:** List of Client Blocks that are not yet released.
- **Contact Info:** List of Client address, email, and phone contact information.

Content Completion

Client Attendance records with content completion as listed in the Completed field in the Attendance table. Used to track what course content was completed on specific date such as a distance learning packet.

Demographics

Client demographics reporting.

- Display Ethnic: Select which Ethnicity value is displayed in the report, Default or User Defined. Report totals only display Default values.

Family/Emergency

Print list, labels, envelopes or merge letter for Client Family records.

- Display Family: Only valid for "List" template. Controls display of family member report row.
- Display Alerts: Only valid for "List" template. Controls display of Client's medical alert and allergies row.
- Merge Text: Only valid for "Merge Letter" template.
- Display Return Address: Only valid for "Envelope" and "Merge Letter" templates. Controls display of return address.
- Display 'Parent Of': Only valid for "Envelope", "Labels", and "Merge Letter" templates. Controls display of additional line "Parent of (Client Name)".
- Display Course Info: Only valid for "Merge Letter" templates. Controls display of course section data.

Funding

Client funding reporting.

Labels/Envelopes

Print labels or envelopes for Clients.

- Template:
 - Labels Mailing: Uses standard Avery 5160/8160 labels
 - Labels Shipping: Uses standard Avery 5164 labels
 - Envelope: Uses standard #10 envelope
 - Row Format: Prints data in row format for easy export and use with other third party software
 - ZIP Count: Prints count of records per ZIP Code
- Include Return Address: Option only for Envelope template
- To Parent Of: Display text "To the Parent Of:" before the name field
- Client/Family: Determines what data area report prints from.
 - Client Mailing: Client mailing address fields
 - Client Residence: Client residence address fields
 - Family (unfiltered): Family address without the Receives Mail field filtered
 - Family (All mail): Family address with the Receives Mail field filtered for All mail
 - Family (Discipline mail): Family address with the Receives Mail field filtered for Discipline mail
 - Family (Progress mail): Family address with the Receives Mail field filtered for Progress mail
 - Family (Recognition mail): Family address with the Receives Mail field filtered for Recognition mail
 - Family (Warnings mail): Family address with the Receives Mail field filtered for Warnings mail
- Do Not Call List Option for Report:
 - If selected to "Exclude" any client with "Postal" in the Do Not Call field will not be sent an email.
 - If selected to "Include" all clients included in the search will be sent an email.

Merge Letters

Uses the Merge Text templates to merge with Client data in a letter format.

- See Marketing Reports for creating templates.
- Do Not Call List Option for Email:
 - If selected to "Exclude" any client with "Email" in the Do Not Call field will not be sent an email.
 - If selected to "Include" all clients included in the search will be sent an email.
- Do Not Call List Option for Report:
 - If selected to "Exclude" any client with "Postal" in the Do Not Call field will not be sent an email.
 - If selected to "Include" all clients included in the search will be sent an email.

Registrations

Print completed Client registration forms.

Schedules

Prints client activity/course schedules.

Test Results

Client Testing records.

- Gain Method: Choose the method used to calculate gain between similar tests. The "Gain/Level Based On" field in the Test List must have a pre-set value. If not, Gain does not calculate. Options are: (a) First/Last - by test date, (b) Min/Max - by lowest and highest scores, or (c) Pre/Post - by pre-test and post-test (Note: when Pre/Post method is used, only test records tagged as pre-test and post-test are included.)
- Client Test Filter: Choose which Clients are included - All, Clients With Tests, Clients Without Tests, Clients Without Pre-Test, Clients Without Post-Test. (Note: When using the Clients Without Pre or Post-Test filter, at least one Test Name must be selected.)
- Gains Flag: Display a flag on the report when the gain meets the parameter(s) entered.

Transcripts

Print Client course and grade transcripts.

- Notes:
 - The Transcript report uses a temporary table to display data. This method allows the report to run faster and provide for data consistency in a live data entry environment so consecutive runs of the report can be run without having data change.
 - If the data is recorded using the separate data per program year method, this temporary table will include all data from the current and prior year databases.
 - The report will be blank unless the temporary table is populated. To populate the temporary, use the Recalculate option in the toolbar before running the report. The temporary table populates based on the user running the report. Once recalculated, the Recalculate option does not need to be run again each subsequent report. It is only necessary to recalculate again when live data has changed and the user desires to update the data in the temporary table.
 - For XenEnterprise users, if a Client has Progress Report or Report Card records, one record must be tagged as Final = Yes. If not, the course assignment will not display in the Transcript. Also, the grade displayed in the Transcript is pulled from the record tagged as Final.
 - Search fields do not affect the data populating the temporary table. Search fields only affect what data displays in the printed report.

- Search fields work differently in the Transcript report than other reports. The searches here work to determine which clients appear in the report but their courses assignments are not restricted.
 - Example: If searching for course code "ALS1001" and Enrollment Status = "Enrolled/Active", the Transcript report will include all course assignments for all students who are Enrolled/Active in course ALS1001. No other students will appear in the report but the students that do appear, all course assignments will appear.
- Assignment Status Include versus Exclude: The single select search option for Assignment Status Include will include in the report only the value chosen, if selected. The multi-select search option for Assignment Status Exclude will exclude from the report each of the values selected, if any are selected.
- Report Options:
 - Group By: Select order in which groups of transcripts are printed.
 - Sort Courses: Select order in which courses display on each transcript.
 - Signature Line: Select a staff/title record to display at the end of the transcript.
 - Display Disclaimer: Option to display a disclaimer statement at end of report that transcript is not official without an official signature.
 - Alternate Title: If text is entered, changes the report title.
 - Display Grades As: Option to display grades As Entered, as GPA, as Percentages, or as Letters.
 - Display Averages As: Option to display grade averages as GPA or Percentages. Averages cannot be displayed as Letters.
 - Calculate Averages: Option to calculate averages based on Straight Averages (no credit hours weighting) or Credit Averages (weighted based on the Credit Hours in the Course Section).
 - Display Credits: Option to display Course Credit, CEUs, CPEs, or none.
 - Credits Location: Select credits from with Course Section or Client Assignment. If Client Assignment, first display is from Transcript Credit field. If blank, uses Earned Credit field.
 - Credits Status: Select which status values earn credit. If "Enrolled and Completed", all status values starting with "Enrolled" or "Completed" get credit. If "Completed Only", then only status values starting with "Completed" get credit. All other status values do not earn credit.
 - Display Hours: Option to display Course Hours (Total Hours field from Course Section), Days Attended (from actual attendance), Hours Attended (from actual attendance), or none. Days Attended displays attended days only and only displays an accurate number of days if entered per day.
 - Display Details: Option to display details and totals.

COURSES



[Courses](#)

Navigation: *Report Menu > Courses*

Overview

Group of reports entirely related to courses and sections including schedules, labels, and more.

Course Lists

Course Section list formatted reports.

- Course Running: Searches for course sections running within the start and end dates selected. If the start and end date range are the same, the search also checks if the course sections run on the specific day of the week. All other searches ignore day of week.
- Detailed List 1 and 2: Detailed 2 also includes the course description and alternate description fields. Detailed 1 does not include these.
- Missing Fees: Displays course sections that have no fees at all or are missing a fee for one or more fee groups. Analysis compares only fees tagged as Include In Balance = Yes and where Revenue Item = Default Revenue Item set in Branch Profile.

Labels

Print various label format for Course Sections and instructors.

Merge Forms

Uses the Merge Text templates to merge with Course Section data in a forms or document format.

- See Marketing Reports for creating templates.

Merge Letters

Uses the Merge Text templates to merge with Course Section data in a letter format.

- See Marketing Reports for creating templates.

Sequences

Prints Sequences grouped by Program Group displaying all courses in the sequence order.

Sign In Forms

Prints sign in forms for course instructor.

FINANCIAL



[Financial](#)

Navigation: *Report Menu > Financial*

Overview

Group of reports entirely related to transactions in the General Ledger including receipts, revenue reports, and more.

Note: ScholarChip assigns a tracking code in Xendirect under any credit card payment – it is listed as a credit card transaction number.

Balance Due

Prints list of clients and courses with balance due fees.

The Balance Due report shows Invoices that are associated with a particular Course.

- Amount Due includes all fees per invoice tagged as "Regular" fee group and Include In Balance = Yes.
- Payment Amount includes all payments where the Payment Type is tagged as "Debit", the payment is not a refund, and matching those in Fees tagged as Include In Balance = Yes.

- Refund/Credit Amount includes all payments where the Payment Type is tagged as "Credit" or the payment is a refund, and matching those in Fees tagged as Include In Balance = Yes.
- Payment Types tagged as "Ignore" are listed but no amount value will appear or be calculated in the Balance Due.
- Refunds entered as negative amounts will calculate incorrectly. Refunds should be entered as positive amounts.
- Account search uses Income Account from Course Section.
- If a Merge Text is selected from the Report Options, the format of the report changes to a statement formatted report per client with the Header and Body 1 displaying above the client's name and the Body 2 and Closing displaying after the payment transactions grid.
- Balance Due Calculation option:
 - Matched 1 will force the balance due calculation by matching course fees to revenue by matching Revenue Items but all unmatched will display when transaction details are displayed.
 - Matched 2 will force the balance due calculation by matching course fees to revenue by matching Revenue Items but all unmatched will display as a separate group after the matched group when transaction details are displayed.
 - Unmatched will force the calculation to be based on total fees and total revenue regardless of Revenue Items identified in both.
- Revenue Item transactions for "Textbook" are excluded in the balance due calculation.

Deleted Transactions

Prints list of transactions from the Deleted Transactions Log. Note that deleted payment transactions cannot be recovered once deleted. The Deleted Transactions Log report will provide enough information to recreate deleted payment records.

- Users only have access to view the report but do not have access to modify these records.

Profit/Loss – Need to add all real Expenses (instructor, equipment fees, room rental, etc.) to run this information.

Prints an aggregate list of course revenues, expenses, and net profit/loss as recorded in the General Ledger section including Client Invoice Payments.

- Include search criteria and course categories.
- Revenue Column: The Revenue column includes transactions tagged as Revenue except transaction tagged with the Payment Types of Discount and Entry Error, which are not included in the report as they do not represent actual revenue.
- Expense Column: The Expense column includes all General Ledger entries with a category value of Expense, Payroll Client, and Payroll Staff.
- Net Column: The Net column is determined by *Revenue - Expense*. Amount values must be a valid, positive number without a dollar sign. All numbers should be entered as positive numbers, even refunds and credits.

Receipts

Prints client receipts for payments transactions can be done in bulk.

- Template options allow for different receipt formats.
- Address display changes based on the following:
 - Client address displays: (1) When there is no Payee address and is no Sponsor address; (2) When the Full Page All template is selected.
 - Payee address displays: (1) When there is a Payee address and is no Sponsor address.

- Sponsor address displays: (1) When there is a Payee address and is a Sponsor address.
- If exists, Payee Name and/or Sponsor Name will display even if Client address is displayed.

Invoices

Prints reports for invoices, invoice lists, aging report.

- Report Template:
 - Invoices -
 - Aging List - list of receivables based on ranges – based on registration date and course start date.
 - Invoice - invoice format report

Transactions

Prints list of General Ledger transactions. (Prints everything in the GL.)

- Transactions includes all transaction that have taken place. Search criteria can be chosen from types, dates, etc.
- Top Portion of the field is a filter that contains Search Criteria.
- Bottom Portion of field is the Format part of the screen that contains Report Options.
- Searching Dates: The field "Which Date" determines which dates are used for the search filter. If not chosen, the Transaction Date is used.
- Time Cutoff: If a time is selected and a Search Date End range is entered, the results will filter for records less than or equal to the Date and Time. In no Time Cutoff is selected, the Search Date End range will filter based on date only regardless of time.
- Omit RegFees: If Yes, the report will not include the special Registration Fees as noted in the Support Center > Knowledgebase > Web Registration > Web Registration Settings.
- Credit Card fields will not display if set to be hidden in the Branch Profile.
- Gateway Proc Only: Processed through ScholarChip.

MARKETING



[Marketing](#)

Navigation: *Report Menu > Marketing*

Overview

Group of reports and functions related to marketing and emailing clients.

If the email notifications generated by the XenDirect Admin module and WebReg module are either not arriving or you are receiving a message that looks like the email cannot be delivered, you may need to have the Xenegrade email server “white listed”. Xenegrade sends the email notification To and From the email address you supplied in the Notification Email field in the Branch Profile. Therefore, some corporate mail servers will reject this email being sent. Contact your IT department to have the Xenegrade email server white listed. The Xenegrade email server address is mail.xenegrade.net.

Brochures

Print brochure style report with data in one column, three column, or row formats and ready for export to a publishing software or vendor.

Create Merge HTML

User created HTML templates used in Report Menu > Marketing > Send HTML Email.

- Use the WYSIWYG developer to create HTML templates or paste HTML code designed using other software. Use the Source button in the WYSIWYG interface to toggle between HTML preview and HTML source code.
- HTML emails cannot include or merge with content from the database as Send Text Email does. The Send HTML Email does allow for flexible searches, but no data can be placed into the HTML templates. See Send Text Email to merge email templates with data.
- The Subject field contains the Subject Line of the email when sent.
- Merge Type: Controls display of template in report options.
- Alternate Return Address: Displays this address as return address in letter merges rather than default address from Branch Profile.

Create Merge Text – Sending Bulk E-mails

User created text templates used in merge Merge Letters, Merge Forms, and Send Text Email.

- Text entered into the fields of the Merge Text record combine with preformatted templates and then combine with Merge Letter reports, Merge Form reports, or Send Text Email. Users have formatting options to display certain additional data such as course information or client contact information with the Merge Text and Send Text Email.
- Merge Name: Name of Merge Text record. Required field.
- Header/Subject: Text to be placed in Merge Forms Header section or the Subject Line of emails.
- Body 1: Text to be placed in merge document Body 1 section.
- Body 2: Text to be placed in merge document Body 2 section.
- Closing: Text to be placed in merge document Closing section.
- Population: Populations this Merge Text record would be used for.
- Merge Type: Controls display of template in report options.
- Alternate Return Address: Displays this address as return address in letter merges rather than default address from Branch Profile.

Adding a Link to a Merge Template

- Links added to merge templates will only display correctly as a link in emails.
- In the Body 1 or Body 2 sections of the merge template, add the link to a document or page on the web as follows: `Display text`
 - Example: `Click here to see features`

Scheduling an Automatic Email

This option allows for an email to be sent automatically to all clients in all course sections based on the send criteria. The primary purpose of the automatic email scheduler is to send an automatic email before a course section starts or after a course section ends. This option is very appropriate to be used as a reminder to students of a course that is about to start.

- This option is only available in the Create Merge Text templates.
- Emails are sent automatically between the hours of 1:00 and 3:00 AM EST on the day the criteria triggers an email event.
- Only clients with an Enrollment Status = "Enrolled/Active" or "Enrolled/OnHold" will receive an email using the scheduler.

- A maximum of 2 templates can be tagged to be schedule.
- To schedule an email, create a new or modify an existing text template, and add values to the following fields:
 - Scheduled: Tag this field Yes.
 - Include Course Info: If yes, the course details will be embedded into the email.
 - Course Date: Select if the Start Date or End Date of the Course Section should be used as the trigger.
 - Days Ahead/After: Enter the number of days before the date as a positive number or the number of days after as a negative number.
 - Example: Entering 10 and Start Date would send an email 10 days before the start date of the course sections.
 - Example: Entering -5 and End Date would send an email 5 days after the end date of the course sections.
 - Category: Select as many categories as desired that should be included in the send email process. At least one category must be selected.

Send HTML Email

Send Text Email

Function to send emails to clients.

IMPORTANT:

Email spamming can cause the IP address of the user's organization and/or the IP address of Xenegrade servers to be placed on a blocked email listing. Xenegrade requires all users to follow all rules, regulations, and laws regarding sending email including giving recipients an Opt-Out option to not receive emails. Xenegrade reserves the right to disable the email function of organizations that do not follow accepted email practices.

- Send HTML Email uses the Merge HTML templates as the subject line and content of the email.
- Send Text Email uses Merge Text templates as the subject line and content of the email. Users have the option to detailed merge course information between the body 1 and body 2 merge text fields in the email when sending to a specific course or courses.
- How To Send Emails:
 - Create an email template (text or html).
 - From the Send Text Email or Send HTML Email, select the search and report options including the Merge Template desired.
 - Click the Print Preview button to review the list of clients resulting from the search options.
 - Close the report and refine the search if necessary. Repeat the Print Preview process until satisfied the list is correct.
 - Using the same search and report options, click the Send Email button.
 - A prompt will display confirming user intention to send email. Click Cancel to stop the email process or OK to send the email.
 - After the mail is sent, a completed prompt will appear. Click Ok to close.
- Email Tips and Notes
 - Always preview the report before emailing. The report details list of client names to receive the email. This list provides the user the opportunity to correct and refine the search options before sending the email. The report also displays which clients will not be sent an email based on lack of an email address or their client record is tagged as an email "Do Not Contact".

- It is best to send smaller numbers of emails rather than large numbers of emails. When large numbers of emails are to be sent, it is suggested to break the search into smaller groups.
- When an email is sent, a record is added to each Client's Case Notes including the email subject line and the date sent.
- A sample copy of every email is sent to the sender's email address for reference and confirmation.
- Session Include/Exclude: If Include is selected, only the Session listed in Search will be included. If Exclude is selected, the Session listed in Search will be excluded.
- Unsubscribe Option - If selected to "Include":
 - The email message will contain a statement similar to this: "If you no longer wish to receive marketing email messages, click here to unsubscribe. Even if you unsubscribe, you may still receive email business messages in regards to your enrollment in existing or future activities."
 - When the client clicks on the link, they will go to a browser window that will inform them the change has been confirmed. The Client Info record will be modified and "Email" will automatically be added to the Do Not Call field list of values. A case not will also be added as a record that the client requested the addition of the email to the Do Not Call list.
- Do Not Call List Option:
 - If selected to "Exclude" any client with "Email" in the Do Not Call field will not be sent an email.
 - If selected to "Include" all clients included in the search will be sent an email.

Statistics

Variety of reports providing useful information for program analysis.

- Paid Count: Matched will force the balance due calculation by matching course fees to revenue by matching Revenue Items. Unmatched will force the calculation to be based on total fees and total revenue regardless of Revenue Items identified in both.

OUTCOMES



[Outcomes](#)

Navigation: *Report Menu > Outcomes*

Overview

Group of reports related to client goals, achievements, employment, progress, and grading. Search criteria varies per report.

Employment

Prints list of client employment data.

Goals/Outcomes

Prints list of client's goals and achievements data.

Grade Reports (Enterprise)

Prints various formats of client grade reports. Search options and report options vary per XenDirect version. Uses the temporary Recalculated Progress Records from the Admin Menu > Client Functions > Recalculate Report Cards utility.

- Grade Search Criteria: Grades are searched as entered, not as converted for report display.
 - Letter Grades: Grades must be entered in the Grading Codes select list to display in the Letter Grades select list. Can be used in conjunction with the Numeric Grades field.
 - Numeric Grades: Valid for number grades from 0 to 100 including decimals. A grade of 100 can not be used in the "From" field of this range. Leave the "To" field blank to search from the starting grade and up. Leave the "From" field blank to search from the ending grade range and down. Can be used in conjunction with the Letter Grades field.
- Report Options:
 - Templates:
 - Grades Annual - A list of all quarter and final grades with attendance. Does not display for grades recorded in Assignments.
 - Grades List - A list of grades.
 - Grade Distribution - A distribution range of the grades for the period requested.
 - Grades Location: Choose the location where grades are recorded, either from Assignments or Outcomes/Progress. Note that the Grades Annual report does not function when this field = Assignments.
 - Display Grades As: Choose how to display the grades: As Entered (default), GPA, Letters, Percentages. Ranges must be entered in the Grading Codes select list for accurate conversions. Letter grades with a blank "high range" value do not convert such as I or Inc. GPA conversion are formatted to two decimal places. Percentage grade conversion are formatted to one decimal place. This option is only used in the Grades List template.
 - Progress Dates: Required when Grades Location = Progress. Choose the date to display in the report. Results will include only the attendance and grade information for the date selected unless the Progress Date Range field is selected as multiple dates. In that case records less than and equal to the Progress Date are included. This option is ignored when Grade Locations = Assignments.
 - Progress Dates Range: Choose to include only the data for the date selected or include all records less than and equal to the Progress Date. This option is ignored when Grade Locations = Assignments.
 - Display District Counselor: If Yes, enables display of residency record Counselor, job title, and phone number. Only active for Grades List and Annual Grades templates only.

Progress Reports

Prints client progress reports and report cards. Report format is designed to display addresses aligned for #10 window envelope. Note: This report uses a temporary data table to run the report for faster performance. The function at Admin Menu > Client Functions > Recalc Report Cards must be run to make sure the temporary table has the latest new and modified client records.

- Report Type: Choose the maximum date for the Progress Report or Report Card desired.
- Sort Order: Choose the sort order.
- Attendance Format: Choose to display absent and tardy counts as Actual, Credit, Both, or None.

- Template: Choose to print the report format or labels.
- Family Filter:
 - When not set to "Client Only", all Client Family records are used.
 - When set to "Family Mail Only", only those Client Family records tagged as Receives Mail = All or Progress are used.
 - When set to "Family Mail w/Client", those Client Family records tagged as Receives Mail = All or Progress are used as well as those Clients without a Family record.
 - When set to "All Family", all Family records are used regardless of the Receives Mail field value.
- Display Salutation: Choose how to display the name in the address location.
- Display Address: Choose which address to display.
- Display Grades: Choose to display grades.
- Display Grade Categories: Choose to display up to the five available grade categories and respective grades or not.
- Display Comments: Choose to display comments.
- Display Final Exams: Choose to display up to five final exams from Final Report Card record. Only final exams tagged as Display = Yes on record will display.
- Display Parent Conference: Choose to display job title for Parent conferences as noted in progress record.
- Display Signature Line: Choose to display Authorized Signature line at bottom of report.
- Display Course Stats: Choose to display Assignment Enrollment Status and Start/End Dates.

Related Lists

Prints content of select lists related to client outcomes.

Skills Profiles

Prints client skills profile reports.

- Profile Type: Choose either Content, Universal, or All as desired.
- Group By: Choose the grouping value.
- Display Comments: Choose to display comments field.
- Display Signature Lines: Choose to display the Student/Teacher lines for initials and date.

PERSONNEL



[Personnel](#)

Navigation: *Report Menu > Personnel*

Overview

Group of reports related to Staff, School Contacts, and Sponsors. Search criteria varies per report.

School Contacts

Prints list, labels, or envelope formatted report of School Contacts.

- 'Return Address' report option only used with Envelope template.
- 'Page Break' report option only used with List template.
- Envelope format based on standard #10 envelope.

- Label format based on standard 8.5 x 11 sheet with 3 columns, 10 rows.

Sponsor Email

Allows for email to Sponsor based on numerous filtering options and Merge Text.

- [Merge Text](#) is required.
- Preview Report displays the Sponsors that will and will not receive the email based on the search parameters selected.
- Search parameter tips:
 - Display Course Info = Yes: To send an email with client assignment data.
 - Return Email: To use an alternate return rather than the Branch default.
 - Salutation Format: To choose how name displays in email greeting.
 - All search fields except Sponsor will search based on the course section assignments linked to the Clients where the Client Company field matches the Sponsor.
 - Client Type: To filter either Individual Clients or Corporate Clients.
 - Prevent Duplicates: If yes, only one email per Sponsor will be sent regardless if the search results would return more than one record per Sponsor.
 - To send a generic email to one Sponsor without any client assignment data, set as follows:
 - Sponsor = select one
 - Do not set any other search field
 - Merge Text = select one
 - Display Course Info = No
 - Prevent Duplicates = Yes

Sponsor Lists

Prints list, labels, nametags, log, donations, stop/hold, merge letter, or envelope formatted report of Sponsors.

- 'Return Address' report option only used with Envelope and Merge Letter templates.
- 'Letter Date' and 'Salutation Format' report options only used with Merge Letter template.
- 'Merge Text' value required when Merge Letter template chosen.
- Envelope format based on standard #10 envelope.
- Label format based on standard 8.5 x 11 sheet with 3 columns, 10 rows.

Staff Email

Allows for email to Staff based on numerous filtering options and Merge Text.

- [Merge Text](#) is required.
- Preview Report displays the Staff that will and will not receive the email based on the search parameters selected.
- Search parameter tips:
 - Display Course Info = Yes: To send an email with client assignment data.
 - Return Email: To use an alternate return rather than the Branch default.
 - Salutation Format: To choose how name displays in email greeting.
 - All search fields except Staff will search based on the course section linked to the Staff where the Instructor field matches the Staff.
 - Prevent Duplicates: If yes, only one email per Staff will be sent regardless if the search results would return more than one record per Staff.
 - To send a generic email to one Staff without any client assignment data, set as follows:
 - Staff = select one
 - Do not set any other search field

- Merge Text = select one
- Display Course Info = No
- Prevent Duplicates = Yes

Staff Labels

Prints various label formats for Staff records.

Staff List

Prints various list of staff data.

- Templates include:
 - Certifications
 - List
 - Notes
 - Staff Development

CERKit Crosswalk – similar Report in ANCOR

RU Report

Bulk Invoice
 Certificate Generic
 Check Reciepts
 Confirmation Letter
 Credit Card Deposit List
 Daily Count
 Discount Report

 Enrollment Status
 Income Analysis
 Invoice

 Name Badge
 Offering List - Offerings with 0 Enrollments
 Offering List with Enrollments
 Offering List Summary
 Online Payment
 Payment Form - Roster based
 Payment Rostor
 Refunds
 Registration List
 Regular Student Roster

 Roster List with Options
 Sign in Sheet with Sessions
 Student Sign in Sheet
 Total Active Students

XenDirect Report

Financial>Receivables>Invoice Template
 Client>Certificates
 Financial>Transaction Report
 Client>Merge Letter
 Financial>Transaction Report
 Attendance>Enrollment Counts
 Financial>Transaction Report
 Attendance>Enrollment List>Enrollment List
 Template

 Financial>Receivables>Invoice Template
 Courses>Labels>Name Tag template or
 Attendance>Enrollment List>Name Tag 1 or 2

 Attendance>Enrollment Counts

 Financial>Transaction Report
 Seems like a Receipt?
 Financial>Transaction Report with Balance Due
 Financial>Transaction Report
 Similar to Transaction Report
 Attendance>Roster>Daily Signing
 Attendance>Enrollment List>Fee Options
 Template
 Attendance>Roster>Daily Signin
 Attendance>Roster>Daily Signin
 Attendance>Enrollment Counts

PART SIX

The Admin ANCOR Menu

EXPLORING MENUS in ADMIN and NAVIGATING THE SYSTEM

Admin Menu

Exploring sub-menus that include:

Client Functions, Course Functions, Export Functions, and Settings, System Tools,

The **Admin** menu contains submenus for system settings, and user security.

Clicking on **Admin**:

CLIENT FUNCTIONS



[Client Functions](#)

Add Fee Group - This is where you update the Fee Group field for clients missing a Fee Group value. Clients with an existing Fee Group value are not affected.

Add Residency - This is where you append a Residency record to all Clients currently without one. No duplicates will be created during this process.

Delete Clients - The Delete Clients function allows you to delete Client and related records in bulk based on the Last Modified Date of the Client record.

Delete One Client - The Delete One Client function allows you to delete a Client and related records in bulk based on the Client ID.

Import One Client - You must have the Client ID and archive year.

Merge Clients - Enter the Client ID for the client record to merge FROM as the SOURCE and the Client ID to merge TO as the TARGET. The Source Client records will be deleted after the merge is completed.

Transfer Attendance - This function will transfer attendance records for one Client from the Source Course Code to the Target Course Code. Dates are optional. Client must be assigned to Target Course Code for attendance to transfer successfully. Attendance not transferred remains with Source Course Code and is not deleted. Function prevents duplicated attendance for same client, course and date.

COURSE FUNCTIONS



[Course Functions](#) -

Add Assignments - The Add Assignments function allows you to add Assignments from existing course enrollments.

Change End Date – Add new end date.

Change Start Date - Add new start date.

Change Status - Drop down provides options.

Cancel Section

Navigation: *Admin Menu >> Course Functions >> Cancel Section*

Overview

This function allows a user to automatically cancel from one to five course sections and perform certain automated tasks at the same time. The additional options vary based on the system's Payment Method and will be performed automatically if enabled.

Only Client Assignments with an Enrolled Status will be included in the automated function. All other assignments will be ignored and remain unaffected.

Course Payment Method

- Enter from one to five valid course codes.
- Change Client Assignment Status: Select No or Did Not Enroll Course Cancelled
- Send Email Notification to Client: Select Yes or No. If Yes, select a Merge Template. Only clients with a valid email address will receive the email message.
- Send Email Notification to Instructor/Department: Select Yes or No. If Yes, select a Merge Template. Only instructors and departments with a valid email address will receive the email message.
- Add Client Case Note: Select Yes or No.
- Add Refund / Credit Transactions: Select No or from available list.
- Refund / Credit Reason: Select from user defined list.
- Void Bill: Select yes or No.
- Set Zero Balance Due: Select yes or No.
- Click Continue to start or Close to cancel.
- After process completes, a list of the Client Assignments affected are previewed in report format.

Invoice A Payment Method

- Enter from one to five valid course codes.
- Delete Client Assignment: Select yes or No.
- Change Client Assignment Status: Select No or Did Not Enroll Course Cancelled
- Add Client Case Note: Select Yes or No.
- Update Invoice: Select yes or No.
- Click Continue to start or Close to cancel.

Invoice B Payment Method

- Enter from one to five valid course codes.
 - Change Client Assignment Status: Select No or Did Not Enroll Course Cancelled
 - Send Email Notification to Client: Select Yes or No. If Yes, select a Merge Template. Only clients with a valid email address will receive the email message.
 - Send Email Notification to Instructor/Department: Select Yes or No. If Yes, select a Merge Template. Only instructors and departments with a valid email address will receive the email message.
 - Add Client Case Note: Select Yes or No.
 - Add Credit Transactions: Select No or from available list.
 - Credit Reason: Select from user defined list.
 - Click Continue to start or Close to cancel.
 - After process completes, a list of the Client Assignments affected are previewed in report format.
-

Exit Assignments - The Exit Assignments function allows you to modify basic exit information for an entire course enrollment.

Merge Sections – Used to merge two Course Sections. To run this utility, enter a valid source and target Course Code and click RUN.

Transfer Attendance - This function will transfer attendance records for all Clients from the Source Course Code to the Target Course Code. Dates are optional. Client must be assigned to Target Course Code for attendance to transfer successfully. Attendance not transferred remains with Source Course Code and is not deleted. Function prevents duplicated attendance for same client, course and date.

EXPORT FUNCTIONS



[Export Functions](#)

Exports data from a select list of data fields.

To Export Data

- Select from the export function from the available menu options. The export fields vary per menu option.
- Enter any search field options desired.
- Click the Export button. A popup window will appear.
- Highlight the fields to export. By default, all fields are highlighted.
- Choose from one of the three export formats.
- Click the Export button.
- From the Download window, click the Save button.
- Choose the location and enter a filename.
- Click the Save button to complete the process.

SETTINGS



[Settings](#)

Branch Profile - Data location where the primary information, system settings, and system defaults for the Branch are recorded. Administered by Bil Leipold and Debra Niece.

Calendar – Master Branch calendar listing dates scheduled, holidays, and deadlines.

Calendar Deadlines – Master list of deadline categories used in the master Calendar.

Organization Profile – Data location where the primary data for the XenDirect licensing organization is recorded.

Permission Groups – Security area where XenDirect group permissions are managed by Debra Niece and Bil Leipold.

Users - Security area where XenDirect user records and their related permissions are recorded by Debra Niece.