



# ***Hands-On New User Training Part I***

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# ***Session 1 Topics***

## ***Setting Classes Up for Enrollment***

- Setting Up the Basics
- Creating Courses and Classes
- Online Registration
- Checklist and Useful Reports



## ***Required Info for Classes:***

- Set up **holidays** first so they are excluded from the class schedules.
- Configure **time periods** to make classes available within the system.
- Set up **sites and facilities (rooms)** to easily select a class location.
- Specify **instructor**.



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## ASAP User Conference

# Holidays

Search

Students Go

Quick Enroll

Find

Create

Tools

**Configure**

- Calendar
- Course Groups
- Customer Groups
- Customize Storefront
- Departments
- Discounts
- Manage Emails
- My Settings
- Online Registration
- Online Registration Site
- POS Configuration
- Preferences
- Reg Forms
- Setup Data
- Subjects
- Subject Levels
- Survey Config
- User Access
- Waivers

View Reports

Switch View

Get Help

ASAP Beta

Create New Holiday

Name \*  
TIME TO CHILL

Date \*  
October 2019  
S M T W T F S  
6 7 8 9 10 11 12  
13 14 15 16 17 18 19  
20 21 22 23 24 25 26  
27 28 29 30 31

Details (optional)  
SAVE THE DATE TO RELAX AFTER LEARNING SO MUCH ABOUT THE SYSTEM.

Design HTML Preview Words: 0 Characters: 0

<< Cancel Save

Holidays & Notes

Sort By: Calendar Date Room A-Z Z-A

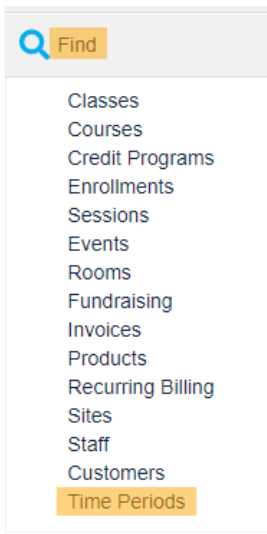
Holiday	Memorial Day	5/27/2019		Add Notes.	Save
Holiday	Presidents Day	2/18/2019		Edit	



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# Fiscal Years



The screenshot shows the 'Fiscal Years' interface in ASAPConnected. At the top, there is a 'View: Fiscal Years' dropdown menu. To its right is a link 'Add new Fiscal Year' with an orange arrow pointing to it. Below this is a table with the following data:

#	Name	Start Date	End Date	Amount	Edit
1	FY 17-18	6/30/2017	7/1/2018	\$0.00	<a href="#">Edit</a>
2	FY 18-19	7/1/2018	6/30/2019	\$0.00	<a href="#">Edit</a>

Below the table is a modal window titled 'ASAPConnected'. It contains the following fields:

- Fiscal Year Name: FY 19-20
- Start Date: 7/1/2019
- End Date: 6/30/2020
- Fiscal Year Fee: Enter unit price
- Is Discountable? ☐

At the bottom right of the modal are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with an orange box.





# Time Periods

Search Add New Default Time Period: FALL 2019 [edit](#)

View: Active Time Periods

ID	Code	Identifier	Description	Configured	Start Date	End Date	Edit	Delete	Archive
31984	F 2019	FALL19	FALL 2019	<input checked="" type="checkbox"/>	9/2/2019	11/29/2019	<a href="#">Edit</a>		
23448	SP 2018	SPRING 18	SPRING2018	<input checked="" type="checkbox"/>	3/15/2018	5/31/2018	<a href="#">Edit</a>	<a href="#">Delete</a>	
31985	W 2018	WINTER 2018	WINTER2018	<input checked="" type="checkbox"/>	12/3/2018	2/28/2019	<a href="#">Edit</a>		<a href="#">Archive</a>

Fiscal Year:

FY 2019-2020

[Add new Fiscal Year](#)

Active Classes:

0

Time PeriodCd:

F 2019

(ex: "SPRING08", "FALL08", etc)

Time Period Identifier:

FALL19

Start Date:

9/2/2019

End Date:

11/29/2019

Name:

FALL 2019

(ex: "Fall Semester, 2008", etc)

Registration Fee For This Time Period:

0

☐ Discountable

Family Time Period Fee:

☐

☒ Configuration is complete, make this time period available within the system.

<< Cancel

Save

This time period **HAS NOT been configured for online registration**. Please go to the configure menu in the left nav and select 'Online Registration' to configure this time period.



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# Sites = Main Buildings

My Settings - Logout

Home

Quick Search

Students Go

Quick Enroll

Find

Create

Class

Course

Facility

Site

Staff/User

Student

Time Period

Tools

Configure

View Reports

Switch View

Get Help

ASAP Beta

## Site Information

Site Name: ASAP CANCUN

Abbreviation: ACUN

Primary Phone: 521998456972

Image: Upload

URL:

Short Description: Cancun Office

Site Capacity (people): 30

Display as Contact: ☒

Is Archived: ☐

☐ This is an external site and is only used for Events

## Site Address

\* To delete the site address, you must empty all the address fields, including state.

Street Address 1: Avenida 5

Street Address 2: Calle 2

City: Cancun

State: NON-US

Postal Code: 77500

## Custom Fields

[Add New Custom Field](#)

<< Cancel

Save





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## ASAP User Conference

# Facilities = Rooms

Room: New Room Time Period: All Active

Site: ASAP CUNCUN

Group: Facility Group Create New Room  
For use with the Reservations Module. If you are using Reservations, select the appropriate Group here. If you are not using Reservations, skip this step.

Name: Conference Room

Image Filename: Upload

Short Description: Round Table

Description: The Conference Room is equipped with a Round Table and all the needed technology to gather ideas with your team.

Additional Information (displays on printed invoices and email confirmations):

Tags: Book it

Total Available: 1

Capacity: 8

Make this Facility reservable online. ☐ Yes ☒ No

<< Cancel Save

Make this Facility reservable online. ☒ Yes ☐ No

Charge fees per person, or per Facility /resource? ☐ Per Person ☒ Per Facility/Resource

User Type	Fee Schedule Type	Fee Amount	Deposit Amount

[Add New Fee Schedule](#)

Fee Type: Facility

Schedule Types: Hour

User Type: Regular Student

GICode Type: REVENUE - Revenue

Fee Amount: 10.00

Deposit Amount: 5.00

Save

[Add Custom Resource Question](#)

Add

<< Cancel Save

Room Reservable Online

For use with the Reservations Module. If you are using Reservations, tick this box. If you are not using Reservations, skip this step.



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## ASAP User Conference

# Staff Members

**Staff Info**

Staff Type:  ☒ This user is an instructor ☐ Archived ☐ Show Online

Department:

Job Title:

Staff No (Optional):

User Name:

Password:

Confirm Password:

Staff Details:

[Design](#) [HTML](#) [Preview](#) Words: 0 Characters: 0

**Subject(s)**

[Add a New Subject](#)

To select multiple subjects, hold control (PC) or command (mac)

Fee Tier:

☐ Allow access to all customers ?

☐ Limit access to a single site/location ?

☐ Send me an email if there are classes with open slots and a waitlist

**Personal Information**

First Name:

Middle Name:

Last Name:

Gender: ☐ Female ☐ Male

Email:

Primary Phone:

Secondary Phone:

Birth Date:

Picture:  [Upload](#)

Hire Date:

**Address Information**

Street Line 1:

Street Line 2:

City:

State:

Postal Code:

From System

[Add New Custom Field](#)

[Save](#)

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## ***Creating Courses and Classes:***

- Understanding Course Groups
- Creating and Editing Courses
- Creating and Editing Classes





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# Course Groups

Home

Quick Search  
Students ▼ Go

Quick Enroll

Find

Create

Tools

Configure

Calendar

Course Groups

Customer Groups

Departments

Discounts

Group Courses Configure Programs



Create or modify **Course Groups** to simplify course browsing.

**Courses Available:**

Course :  **Search**

**COURSE101**  
CREATING COURSES

**Selected Courses:**

Course Group: BASIC INFORMATION  
[Add New](#) [Edit](#) [Delete this Group](#)

Group Name: BASIC INFORMATION  
Image:  [Upload](#) [Delete Image](#)

Description:  
Required Info for Classes

[Design](#) [HTML](#) [Preview](#)

[Manage Prerequisites](#)

The person must have:  
[select one option]

[<< Cancel](#) [Save](#)

[Save](#)

**Selected Courses:**

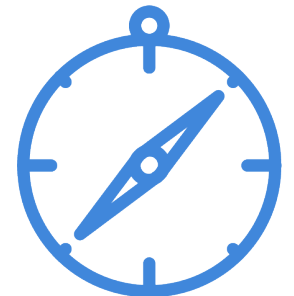
Course Group:  
BASIC INFORMATION  
[Add New](#) [Edit](#) [Delete this Group](#)

**BASIC INFORMATION**

☒ Show Online

**COURSE101**  
CREATING COURSES

[Save](#)



# *Courses vs Classes*

A course includes general information:

- Name, codes (Course Code and CIP/A-22), course groups.
- Short and full description plus additional info.
- Grade level, sensitive personal information checkbox.
- Prerequisites (if any), custom fields and course fees.

A class contains specific data:

- Schedules, location, instructors and class status.
- Class fees and requirements (capacity, age limit).
- Waitlists and attendance preferences and custom fields.






# Creating Courses and Classes

Course | Detail

Time Period: All Time Periods ▼



CREATING COURSES

[Hide Description](#)  
Creating Courses and Viewing Classes step by step.

Edit

Course Groups:

BASIC INFORMATION [Remove](#)

[Add more groups...](#)

Credential:

[Upload Course Media](#)

[Create Single Class](#)

[Create Multiple Classes](#)

[Copy Course Fees To Existing Classes](#)

[Show Time Period Notes](#)

[Copy This Course](#)

Create

Class

Course

Facility

Site

Find

Classes

Courses

Enrollments

Facilities

☐ Search in all time periods

show filters

Search

Add New

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# Course Details II

Course Fees:

Edit

[Add Custom Questions](#)

Custom Questions

Add

Custom Fields

CIP Code

3252

Scheduled Classes

ClassCd	Instructor	Start Date	End Date	Days	Start Time	End Time	Room	
COURSE101	TBD TBD	10/1/2019	10/31/2019	Mo Tu Th	10:00 AM	11:00 AM	Conference Room	<a href="#">View</a>

[Edit Existing Classes](#)

Historical Classes

Select Timeperiod: All Timeperiods ▼

ClassCd	Instructor	Start Date	End Date	Days	Start Time	End Time	Room	
COURSE.WEEK	TBD	12/3/2018	1/28/2019	Mo	09:00 AM	10:00 AM	TBD	<a href="#">View</a>

[Back to Courses List](#)





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## ASAP User Conference

# Class Details

Class Details

Title: CREATING COURSES

Description: Creating Courses and Viewing Classes step by step.

Status: Active ?

Department: --Select--

Class Location

New Location ?

Site: ASAP CANCUN Facility/Room: Conference Room

Primary Instructor

New Instructor ?

Primary Instructor: TBD

Pay Schedule: Select Payment Type

Class Fees

Default Fees(s)

Fee Type	Customer Type	Amount	G/L Account	1098 Eligible	Discount	Action
	Fee Sum:	\$0				

Add a new fee: Select Fee

Class Schedule

☐ the schedule for this class is TBD

Time Period: FALL 2019

Every: Weekly

The day pattern is chosen automatically, based on class start and end dates. Please review these selections, and choose any additional days on which the class will occur.

On: ☒ Mo ☒ Tu ☐ We ☒ Th ☐ Fr ☐ Sa ☐ Su

Beginning on: 10/1/2019 and ending on: 10/31/2019

From: 10:00 AM To: 11:00 AM Add Break

☐ this is an overnight class ☐ start times vary from day-to-day

[View Class Instances](#)

Additional Class Details (Hide Details)

Code: COURSE101 Class Capacity: 16 ?

Min Enrollment: 8

Instructional Setting: Select Internet Available: Select

Student age requirements:  
Min Age: 0 yrs 0 mos Max Age: & Up yrs 0 mos ☐ No age requirement

☒ Show Online ☐ Allow wait list ☐ uses Scan Check-In Attendance

Additional Information (displays on printed invoices and email confirmations):

Design HTML Preview Words: 0 Characters: 0

\*The text length of the additional information is restricted to 4000 characters.

Custom Fields

Add New Custom Field

Cancel Save and Create Another Class Save and Close



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# Class Details II

**Class Schedule**

☐ the schedule for this class is TBD

Time Period:


Every:

The day pattern is chosen automatically, based on class start and end dates. Please review these selections, and choose any additional days on which the class will occur.

On ☒ Mo ☒ Tu ☐ We ☒ Th ☐ Fr ☐ Sa ☐ Su

Beginning on:  and ending on:

From:  To:  [Add Break](#)

☐ this is an overnight class  ☐ start times vary from day-to-day

[View Class Instances](#)

**Additional Class Details (Hide Details)**

Code:  Class Capacity:

Min Enrollment:

Instructional Setting:  Internet Available:

Student age requirements:  
Min Age:  yrs  mos Max Age:  yrs  mos ☐ No age requirement

☒ Show Online ☐ Allow wait list ☐ uses Scan Check-In Attendance

Additional Information (displays on printed invoices and email confirmations):



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# Online Registration


## Online Registration Config


Time Period: All Active ▼

Use this page to configure the start and end dates for online registration, by Time Period.

Time Period	Reg. BeginDate	Reg. EndDate	PriorityRegBeginDate	PriorityRegType	PriorityTypeValue	Edit / Delete
SPRING2018	6/5/2017 12:35:10 PM	6/5/2018 12:35:10 PM				 

Time Period : FALL 2019 ▼

Reg. Begin Date : 9/1/2019 

Reg. End Date : 11/30/2019 


Reg. Start Time: 08:00 AM ▼

Reg. End Time: 11:30 PM ▼

Please enter all times in local time, as configured in your preferences

☐ Allow priority registration

Save

 Configure

- Calendar
- Course Groups
- Customer Groups
- Departments
- Discounts
- Manage Emails
- My Settings
- Online Registration
- Online Registration Site
- POS Configuration
- Preferences
- Reg Forms
- Setup Data
- Subjects
- Subject Levels
- Survey Config
- User Access
- Waivers





# Checklist

## Required Info for Classes

Whenever a class is created – whether as a new course or a new offering of an existing class – the following information is required:

### [Holidays](#)

The best practice is to set up holidays first, prior to creating/copying a class. Once the holidays are added, then these holidays are excluded from the class schedule.

### [Time Periods](#)

### [Sites and Facilities \(Rooms\)](#)

A class location – the site and facility – must have a capacity greater than 0.

### [Staff](#)

A class instructor must be specified. A class may have more than one instructor assigned to it.

## Courses and Classes

Review or Modify [Course Groups](#) as Needed.

Note: If you are using "Programs" (the parent to course groups) then [refer to this article](#) to learn more about this class hierarchy structure and how courses/classes are organized within ASAP.

### [Create New Courses](#) (if needed)

### [Create a New Class](#)

### [Edit a Course or Class](#)

Copy a class from an existing course by going to the "I want to" menu from a class details page and select "Copy a class."

## Configuring the System for Enrollments

When your organization is ready to start enrolling students, then there are still two steps you need to do:

- Set the [online registration period](#) to control when students can/cannot be enrolled into classes and set the visibility of your classes on the public site.

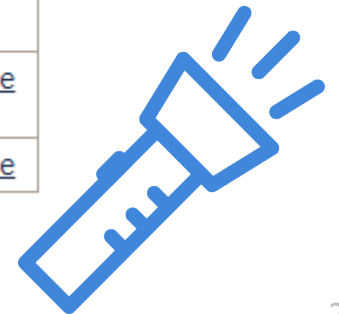


# Useful Reports

- [Class Roster Report](#)
- [Report Sample: Class Roster \(grid\) \(Students/Classes\)](#)
- [Report Sample: Class Summary Master \(Students/Classes\)](#)
- [Sample: Course Catalog \(Students/Classes\)](#)

Custom Queries		
★	All Active Staff	See all unarchived employees <a href="#">Unsubscribe</a>
★	All Course Groups By Organization	Displays List of all Course Groups by organization <a href="#">Unsubscribe</a>
★	All Courses By Organization	Displays List of all Courses by organization <a href="#">Unsubscribe</a>
★	All Courses in Tops Instr Program By Organization	Displays List of all Courses and Tops Instructional Program By Organization <a href="#">Unsubscribe</a>
★	All Credit Programs by Organization	Displays all Credit Programs by Organization. ID1 = 0 - Programs, ID1 = 1 - Programs and Requirement Groups <a href="#">Unsubscribe</a>
★	All Facilities for Organization	Displays List of all Facilities and related Sites for organization <a href="#">Unsubscribe</a>
★	All Time Periods By Organization	Displays List of all Time Periods by organization <a href="#">Unsubscribe</a>

[Click here to BROWSE our list of extended Custom Queries](#)



***Questions?***  
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