

Getting Started with ASAP

Simply put, you will enter details about your organization, create classes and put those classes online so your customers can register for those classes. This guide will show you how to do this.

There are a LOT of bells and whistles available in ASAP. This guide is designed to show you the basics so you can quickly see how easy ASAP is to use. It skips steps that many companies don't use and focuses on the fundamentals.

There are several basic tasks that you need to carry out on the admin side to get your system up and running.

1. Create New Time Period
2. Configure Calendar
3. Creating New Courses
4. Create New Classes
5. Configure Preferences
6. Create/edit Registration Forms
7. Configure Online Registration

To begin, bring up your admin site. Go to <http://app.asapconnected.com> . Enter your unique Company ID, user name and password to enter the site.

While you are creating your school environment on the admin side, you can view what your public sees by visiting the public page. To view your configuration changes on the Public Online Registration Pages, go to

<http://register.asapconnected.com/default.aspx?org=xxx>

(xxx=your Company ID).

You may also click "View Online Registration" from your app.asapconnected.com homepage.



Keep this page open in a separate window. To view your changes online, visit this page, click refresh and view your configurations. Courses and classes will not appear online until you have "configured" online registration (see: #7 above **Configure Online Registration**).

Get to know the Dashboard and Left Navigation (Nav) Panel

The Dashboard is your front page, the thing you see when you first login to ASAP. You can customize this so you see the things that are important to you as you begin your session.

The Left Nav Panel is a series of links, with more nested beneath, to allow you to create and use ASAP.

Time Period: All Active

Welcome C. Loo-Garcia! Logout

Time Period drop down allows you to select a specific time period, all active time periods or all time periods.

Home-Brings you back to the dashboard
Quick Enroll-Allows you to quickly enroll students into classes from your admin site
Find-Allows you to search for specific things (classes, students, etc.)
Create-Allows you to create new elements (time periods, sites, etc.)
Configure-Allows you to make configuration decisions (online registration, preferences, etc.)
View Reports-Allows you to run a variety of reports to get information about your data
Get Help-Allows you to access the ASAP support site and/or submit problems/suggestions
Quick Links-Helps you to quickly return to recently viewed pages

Quick Links
 Last Class
 Last Student
 Last Report
 Last Page

Class Name	Capacity	Enrolled	Pending	Waitlist	Open
FRST4M01 - 4 M F	40	0	0	0	40
V1ATT02 - A	15	1	1	0	13

Transactions by Application

Now you are ready to begin! Here is a checklist of what you should collect before you begin building:

- Your organization's holiday calendar
- Site/Room information—names and addresses of the sites/buildings you will be using and a list of rooms within these sites
- Staff information —names, email addresses, phone numbers, any details you want to include for your staff. Aside from name and email address, all other fields are optional and can be entered later.
- Your latest Course Catalog (you may take the Course Group/Course details from here). Full detailed descriptions can be entered later.
- A system for coding Courses—this is flexible, but it's best to decide on a system from the start and be consistent
- Course fees
- For classes (multiple offerings of each course with specific details associated with each) you will need the following information for each class:
 - A system for coding classes (built on your course code system)
 - Start and end date ranges
 - Start and end times
 - Capacity
 - Instructor
 - Room

Create New Time Period

Time Periods tell the system what session these classes are for. Time Periods encompass the date range within which the classes will be held. When you schedule a class, you place it in a Time Period. Some organizations offer multiple Time Periods such as spring, summer, fall, winter. Some use semesters or quarters. Others use calendar or fiscal years.

Time Periods are also independent from each other and can be separately turned on and off for online registration. This gives you a lot of control over when you post your classes for online registration.



From the left nav panel, select **1** Create and **2** Time Period

In the Time Period Code field type a **3** brief code (you are limited to 10 characters). Leave **4** Time Period Identifier blank
Specify a **5** start and end date

Type a **6** name for your time period. Make the name meaningful. This is the text that you will look for when scheduling classes, in reports and when searching for items in your ASAP admin site. This is the text that you will search for/with on your admin site. You might call a Time Period something like Spring Semester 2012 or Calendar Year 2012.

Leave **7** Registration Fee For this Time Period and G/L Account blank.

Select **8** Configuration is complete, make this time period available within the system. If you have this selected, you can register a customer on your admin site, once you have a Class created within this Time Period, Leave this unselected until you are ready register students into Classes in this Time Period on your admin site. This does **not** make the Time Period available on your public site. This will be covered after you have created a Class.

Click **9** Save.

The image shows a form for creating a new time period. The fields are as follows:

- Time PeriodCd:** A text input field containing '2012'. A box with the number '3' is next to it. A note says '(ex: "SPRNG08", "FALL08", etc)'. The field is highlighted in light blue.
- Time Period Identifier:** An empty text input field. A box with the number '4' is next to it.
- Start Date:** A date picker field showing '1/1/2012'. A box with the number '5' is next to it.
- End Date:** A date picker field showing '12/31/2012'. A box with the number '5' is next to it.
- Name:** A text input field containing '2012'. A box with the number '6' is next to it. A note says '(ex: "Fall Semester, 2008", etc)'. The field is highlighted in light blue.
- Registration Fee For This Time Period:** An empty text input field. A box with the number '7' is next to it.
- G/L Account:** A dropdown menu. A box with the number '8' is next to it.
- Configuration is complete, make this time period available within the system:** A checkbox that is checked. A box with the number '8' is next to it.
- Buttons:** At the bottom right, there are two buttons: 'Cancel' and 'Save'. A box with the number '9' is next to the 'Save' button.

Configure Internal/Admin Calendar

The Internal/Admin Calendar is used to tell the system when classes will be held. The Holiday feature is used to tell the system when classes will not be scheduled/held in the event of an observed holiday. If you are going to use ASAP to take attendance, Holidays will not be available as dates for taking attendance. To configure holidays in the calendar, do the following:



From the Left Nav Panel, select **1** Configure, then select **2** Calendar

Select **3** Create New Holiday

Type a **4** Name and select the **5** Date of the Holiday

Type any **6** Details you want to include about the holiday (optional)

When finished, click **7** Save



You will see a **8** message at the top of your page confirming that you successfully saved the holiday.

Create a New Course

Imagine courses as the master screens in a print shop. The classes within the course are carbon copies of the course with the addition of the variable information such as individual start and end dates and times, sites, capacities and teachers.

Courses are not set in stone. They are flexible and can be edited by administrators after they are created. It's best to be as complete and as accurate as possible, but changes can be made later.

From the left nav panel, select **1** Create **2** Course

Type a **3** Title for the course. This will also be the title of all classes offered from this course.

Type a **4** code for the course. This is the identifier that makes each Course unique. You can use letters and/or numbers. Choose any pattern you like, but consistency is best.

Select **5** Add New Course Group (after you've made a course group, it will be available the next time you create a course from the **6** group drop down).

Course Groups are like a table of contents. They are the broadest category in ASAP and your customers will navigate your public site via these categories.

Type a **7** Group Name (remember that this is what your customers will see on the left nav of your public site) and a **8** Group Description.

Tick **9** Show Online and click **10** Save and make sure the Course Group you made is selected

Upload any **11** image that you may have for this course (optional).

Give the course a **12** short description (This only appears in Featured Items)

Type a **13** full description of what this course is about. This will be useful for students who want to learn more about what this class will be like. This information will appear for each class that is created from this course and is not editable at the class level.

Type any **14** additional information you may want to provide for your students. This will appear on invoices and email confirmations and is editable at the class level.

Skip **15** credit value, **16** grade, **17** prerequisites and **18** deposit amount.

**Create New Course/
Create New Class**

Course fees are applied to any classes that are made from the courses. You can also delete course fees from classes and add separate fees at the class level.

Select the **19** fee type, type the **20** fee amount and click **21** Add Fee. Note that there is a field for G/L codes. If you will be using G/L codes, you will need to go back and enter these. Also note that there is a tick box labeled Discountable. This tick box must be checked for a discount to work with this class. The discount still must still be created.

Fee Type	Customer Type	Amount	G/L Account	Discount	Action
Registration Fee	Regular Participant	\$100.00		0	True Delete
Fee Sum:		\$100			

Note that the **22** fee is visible. Click **23** save. You will be taken to the Course Detail screen for the course that you just created (shown below).

23

Create a New Class

Because you will be on the Course Details screen, you can use the **1** Create Single Class link in the Course Details screen.

You can also create a class by clicking **2** Create **3** Class (if you use this method, you will also need to tell the system which Course you are choosing to build a Class).

The **4** title and **5** description come from the Course and is not editable at the Class level.

Make sure that **6** status is set to Active, Select **7** New Location. Select the **8** site and type the **9** name of the new facility. Click **10** Save facility.

The facility name will now be available on the **11** Facility/Room drop down (not shown). When you create another class, this facility will be available in the Facility/Room drop down. Make sure the facility you just created is selected.

Select **12** New Instructor. Type the **13** first name, last name and user name for this instructor. Select **14** teacher as Employee Type. Click **15** Save Instructor.

The instructor name will now be available on the **16** Primary Instructor drop down (not shown). When you create another class, this teacher will be available in the Primary Instructor drop down. Make sure the instructor you just created is still selected.

Create New Class

Class Fees

Default Fees(s)

Fee Type	Customer Type	Amount	G/L Account	Discount	Action
Registration Fee	Regular Participant	\$100.00		True	Delete Edit
Fee Sum:		\$100.00			

Add a new fee:

Note that the **17** fee is coming over from the course. If you need to add extra fees specifically for the class, use the same method you used when creating the class fees.

Class Schedule

the schedule for this class is TBD

Time Period: 2012

Every:

On: Mo Tu We Th Fr Sa Su

Beginning on: 1/12/2012 and ending on: 3/22/2012

From: 06:00 PM To: 09:00 PM start times vary from day-to-day

this is an overnight class

[View Class Instances](#)

"To view and exclude specific Class instances, save page, then return to view and modify Class instance schedule."

Select the **18** time period that the class is being scheduled in, select whether this class will be held **19** weekly or monthly (weekly is most common), select the **20** day(s) of the week this class will be held on, select **21** start and end dates and **22** start and end times.

Additional Class Details (Hide Details)

Code: BEGTSCR01 Class Capacity: 15

Min Enrollment: 0

Student age requirements:

Min Age: 0 yrs 0 mos Max Age: 200 yrs 0 mos No age requirement

Show Online Recurring Fee Allow wait list uses Scan Check-In Attendance

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

Please alert us immediately if you have any vinyl or rubber allergies.

[Design](#) [HTML](#) [Preview](#) Words: 12 Characters: 69

Type the remainder of the **23** code (the first part of the code comes from the course code), a **24** capacity and verify that there is a tick in the **25** show online tick box. This will be ticked automatically. The **26** additional information may be edited at the Class level. Skip all of the other steps in this section—you can learn more about these later.

Click **27** Save and Close.

Class Detail

Time Period: All Active

 **Beginning T-Shirt Screen-Printing**
Class Code: BEGTSCR01

Print Shop
Fairley, Shepard
Age Range: 0 - 200

Course: Beginning T-Shirt Screen-Printing
[Move class to new course](#)

Fees: Regular Participant \$100.00

1/12/2012-3/22/2012
Thursday, 06:00 PM - 09:00 PM

[View Class Media](#)
[Manage instructors and sponsors](#)
[View Class Instances](#)
[Edit Grades/Credits](#)
[Show / Hide Class Question](#)
[Show Links to Online Registration](#)
[Register \(w/Quick Enroll\)](#)

Enrolled Waitlisted Pending Drop

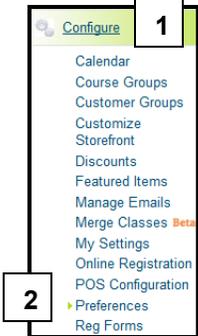
Registration Info Revenue Info Expenses

No record found. Enrolled: 0

You will be brought to the **28** Class Detail page.

Configure Preferences

There are many Preferences that you can change to make sure your organization has accurate details. Preferences are separated into 3 primary categories. This is a brief glance at some of the areas that might be useful early on. Each of the line items is editable by clicking the Edit button on the bottom right of the category, making changes and saving.



From the left nav panel, select **1** Configure **2** Preferences

Organization Info

 Name : Western Media Arts Center and Museum
 URL : www.wmacm.org
 ASAP URL: <http://www.asaponlinereg.com/film>
 Description : Western Media Arts Center and Museum is a non-prof
 Site Headquarters : Western Media Arts Center and Museum Headquarters
 From Email : hildy@wmacm.org
 Contact Name : Hildy Johnson **3**
 Contact Phone : 310-555-1212
 Contact Email : hildy@wmacm.org
 Tax Id : 9999999999 [Edit](#)

Payment And Transaction Configuration

Credit Cards Accepted : Visa ,Master Card ,American Express
 Accept Electronic Check Payments : No
 Allow Online Registrants to 'Pay Later?' : Yes
 Allow users to pay deposit-only for valid courses : Yes
 Allow Generic Credits: Yes **4**
 Allow customers to make partial payments on existing invoices: No **4**
 Accept Online Payments: Yes **5**
 ConfirmationBCC : mel@wmacm.org **5**
 Sales Tax: 9.25 **5**
[Update Gateway Information](#)
[Add/View Custom Payment Types](#)
[Edit](#)

Preference

Allow waitlists : Yes **6**
 Allow registration after classes begin: Yes
 Auto-send class reminders before first class: No **7**
 Allow automatic prorating of class fee : No
 Allow students to transfer classes online : Yes
 Allow Students to select their own member type during registration : Yes **8**
 Assign G/L codes to all fees : Yes **8**
 Show class openings : Yes **8**
 Require manual entry of coupon codes for in-house registrars : No
 Validate customer schedules: No
 Track computers and devices to transactions. (requires device registration): No **9**
 Time Zone: PST **9**
 Default State: CA **9**
 Security: Minimum Password Strength **10**
 AsapConnected : None
 Online Registration : None
 Collapse Threshold: 3 [Edit](#)

The Organization Info section includes items that pertain to your organization information. The **3** contact information (Name, Phone and Email) appears in the Contact Us area of your public site.

The Payment and Transaction Configuration contains items that focuses on payment information. Make sure **4** Accept Online Payments is marked Yes if you will be accepting online payments and use the **5** Update Gateway Information link to set up your payment gateway.

The Preferences section gives you a lot of options. You can **6** allow waitlists (you still need to select which classes will have waitlists enabled), **7** allow registration after classes begin, **8** enable G|L codes (you still need to set them up and assign them), set your **9** time zone (used for online registration periods) and your **10** default state (this state will show up automatically on registration forms but students can select a different state)

Configure Registration Forms

Your admin site is already set with a default registration form that will be available to you when you register new students on your admin site and when a student registers on your public site. You also have the flexibility to create additional registration forms and to edit and customize the default registration form to meet your organization's needs.

From the left nav panel, select **1** Configure then **2** Reg Forms

To edit the default registration form, select **3** Reg Form from the dropdown.

As you are editing the reg form, select **4** Preview to see what the registration form will look like on your admin site.

The instructions are the same for all but the last category. To make a field visible during registration, select the **5** tick box to the left of the text boxes. To make the field required during registration, select the tick box to the **6** right of the text boxes

To edit the terminology of a field, select **7** edit to the right of the line item, change the terminology and save changes. For example, you might want to change Secondary Phone Number to Mobile Phone Number or Fax Number. This allows you to do that.

Continue to **8** select/deselect fields from the rest of the categories

Configure Registration Form/Featured Items

The final category (Other) behaves a bit differently from the rest. It allows you to type questions and have your students select from a dropdown (that you provide) or type the response in a text box. The visible/required/edit options from the previous categories are used here. To enter a new question, **9** type in the field below Add New Question. Type the question. Select **10** required if the response is a requirement. Select whether it is a **11** text box or a dropdown response. If it is a dropdown, you will type a series of words that your students will select from. When finished, select **12** Add.

Select your own Featured Items

Featured Items are the classes that you can promote on your public homepage. If you don't select them yourself, fear not! The system is designed to select randomly from your scheduled classes.

From the left nav panel, select **1** Configure then **2** Featured Items.

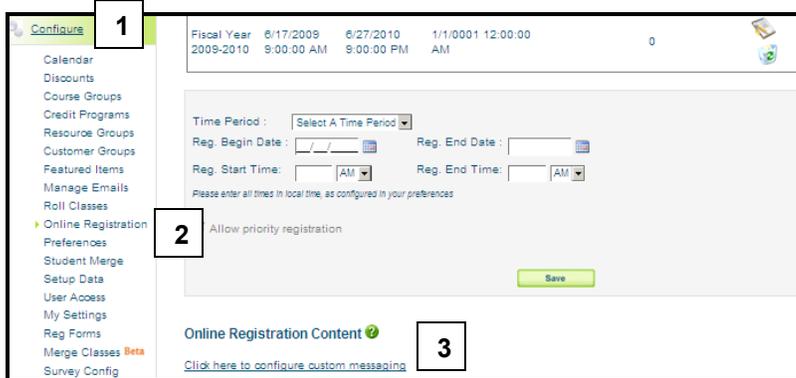
You will typically be selecting featured classes, rather than creating your own custom HTML page. To select featured classes, select **3** I want to select featured classes.

To select classes, choose from the **4** dropdowns. Select **5** Save.

This is an **6** example of what your featured items might look like.

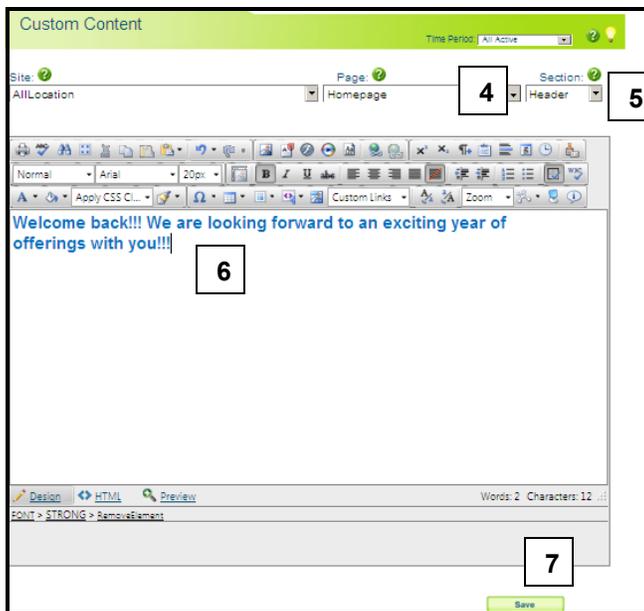
Configure custom messaging on your Public Site

You have the ability to add text to most of the pages on your public site. This is very useful if you want to quickly give information to your customers.



From the left nav panel, select **1** Configure then **2** Online Registration.

Scroll to the bottom and select **3** Click here to configure custom messaging

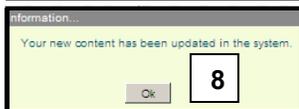


Select the **4** page on which you want the text to appear

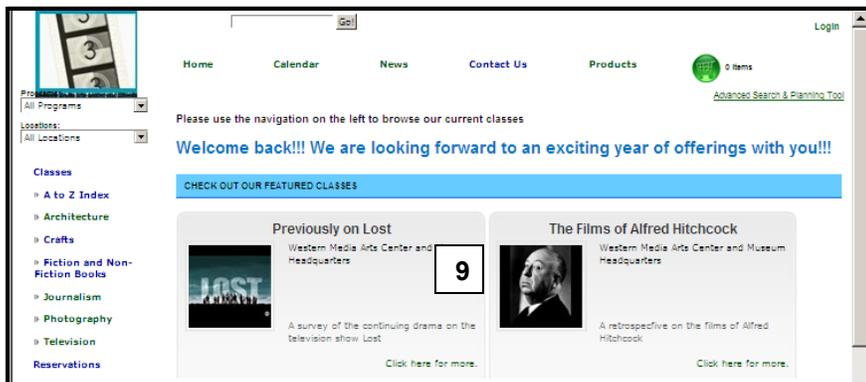
Select the **5** section of the page on which you want the text to appear (header is most commonly used)

Type the **6** text, making any formatting changes you want to make

Click **7** Save



You will see a message that confirms that you have updated your text. Click **8** Ok



This is what your **9** custom messaging might look like on your public page.

Configure Online Registration

When your class is created and checked to make sure that all data are accurate, the final step to do is Configure Online Registration to tell the system when to turn the classes on so that they appear on the front end public webpage.

The standard registration process allows every user to register at the same time. Priority registration allows a specific group of students to register before all others. For example, you might want to allow current students to register in a popular class before new students. You can learn more about this later.

On the left nav, click **1** Configure **2** Online Registration.

Select the **3** Time Period you are working on, select the **4** start and end dates and times. The times selected will reflect the time zone specified in Preferences.

Remember, this is *not* when the Time Period starts. You set those dates when you created the Time Period. These are the opening and closing dates and times for registration and will likely differ from the actual dates of the Time Period.

When finished, click **5** Save.

The screenshot shows the 'Configure' page with a left-hand navigation menu. Callout 1 points to the 'Configure' header. Callout 2 points to 'Online Registration' in the menu. Callout 3 points to the 'Time Period' dropdown menu. Callout 4 points to the 'Reg. Begin Date' and 'Reg. End Date' fields. Callout 5 points to the 'Save' button at the bottom right.

Now you are ready to see what your class looks like on your public site!

<http://register.asapconnected.com/default.aspx?org=xxx> (xxx=your Company ID).

You may also click View Online Registration from your app.asapconnected.com homepage.

The screenshot shows the 'Dashboard HOME' with a navigation menu on the left. The 'View Online Registration' link is circled in the main content area.

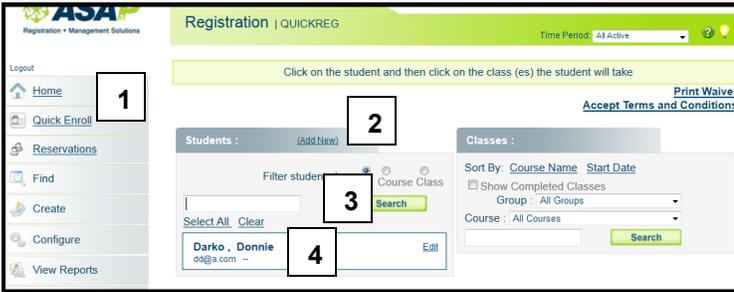
This is the Course Group, Course and Class that was just created.

The screenshot shows the public website interface. The 'PRINTMAKING' section is highlighted. A class titled 'Beginning T-Shirt Screen-Printing' is listed. Below it is a table with class details:

Register Now!	Section	Location	Instructor	Start	End	Days	Start Time	End Time	Fees	Details
Register Now!	BEGTSCR01	East Campus Print Shop	Fairey	01/12/2012	03/22/2012	Th	06:00 PM	09:00 PM	\$100.00	View

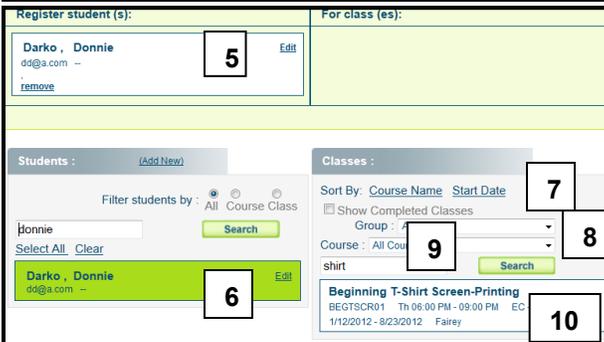
Quick Enroll

Quick Enroll allows you to (quickly) enroll students on your ASAP admin site. This method allows you to register one student for one or for multiple classes, but does **not** allow you to register multiple/unrelated students on the same invoice.



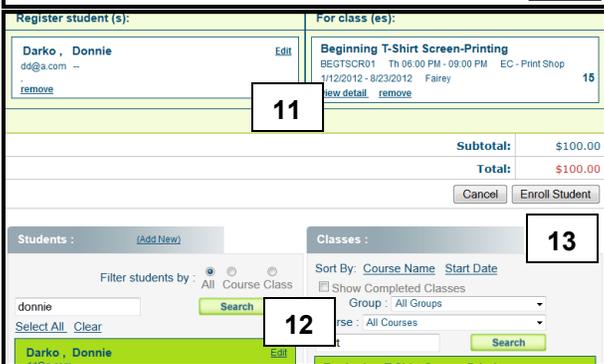
From the left nav, select **1** Quick Enroll. Click **2** Add New and fill out the registration form for the student and save your work. When you have students in your database, you can simply type a portion of the registrant's name and click **3** Search.

Whether you have created a new student or have found an existing student, the student(s) name(s) will appear below the search box. **4** Select the correct student.



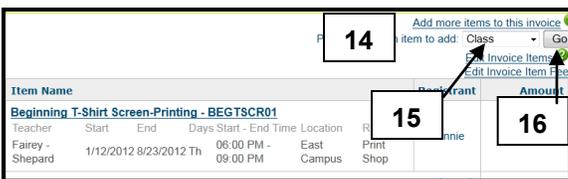
When you have selected a student, the student name will appear under **5** Register Student in white and under the **6** Student Locator in green.

Now, search for a class. You can narrow by **7** Course Group or **8** Course. You can also type a **9** key word in the search box and click search. When you have found the class you are looking for, **10** select the class (*classes that are green are already selected, classes that are grey are full*).

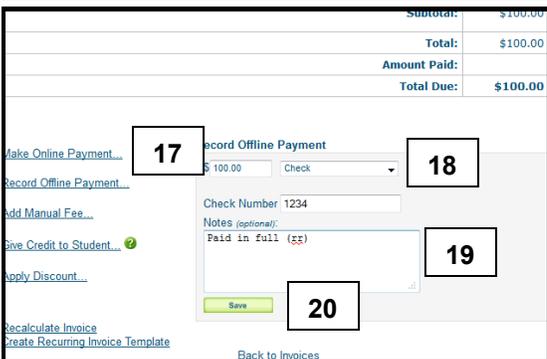


When you have both a student and a class selected, both will appear on the top of the screen in **11** white and on the bottom of the screen in **12** green. You can add as many classes as you want to add for this student. By following steps 7-10 above for the classes you are selecting.

Click **13** Enroll Student

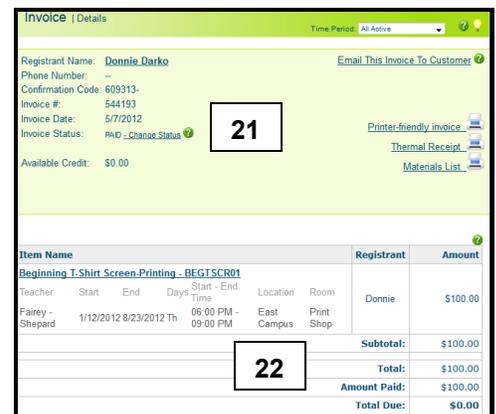


This takes you directly to the invoice. If you need to add further classes to the invoice (for this student or for students in this family account), click **14** Add more items to this invoice, select **15** Class and click **16** Go. This will take you back to Quick Enroll



When you are ready to process payment, scroll to the bottom of the invoice and select a **17** payment method (this example is selecting Record Offline Payment). Make any of the other **18** relevant selections for the payment method, adding any **19** notes you want to include. Click **20** Save.

You will now see the invoice status change to **21** Paid and a confirmation of the **22** payment details.



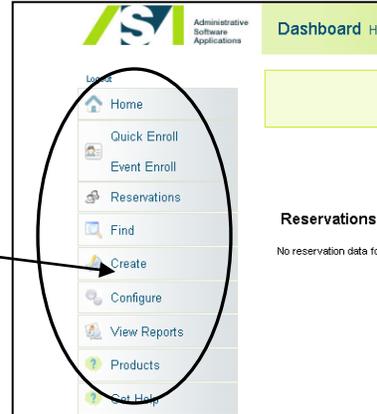
FAQ

Are there any special phone numbers or web addresses I should keep handy?

Our website is <http://asapconnected.com/> (but you already knew that!).
 The URL for your **admin** site is <http://app.asapconnected.com> and the ASAP **help** website can be found at <http://support.asapconnected.com/>
 The URL for your public site is <http://register.asapconnected.com/Default.aspx?org=xxx> (xxx=your Company ID)
 Submit a support ticket and browse for help on our support site (<http://support.asapconnected.com/>)

What's the panel on the left for? (using the navigation panel)

On ASAP, as well as on most websites, there is a consistent panel that you can refer back to in order to move around the site. This is called the Navigation (Nav) Panel. On ASAP, it's the panel that you see on the left edge of the screen.

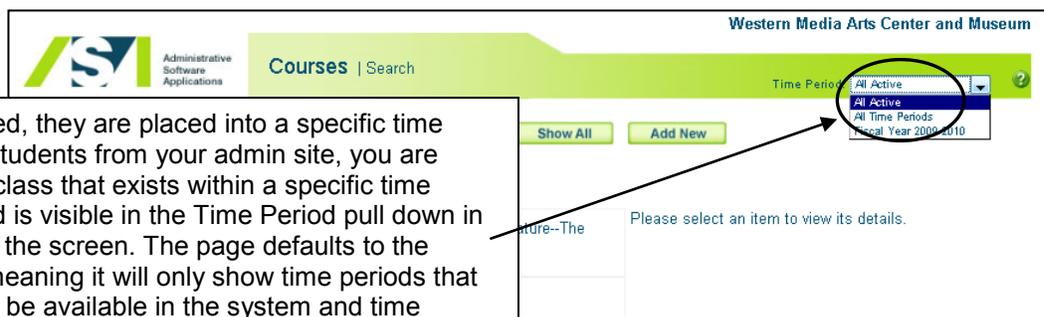


My screen looks different from some of the screens in this manual. Is something wrong?

Absolutely not! This guide is made using a database with all the bells and whistles. There are many modules that are available to you (Conferences, Events, Reservations, Products, for example), but you can run a fully operational database without them. Give us a call/shoot us an email for more information.

What time period are we in?

A time period is just that: a period of time. You might have several different time periods existing simultaneously—maybe you have an annual time period for some classes and events, as well as quarterly time periods for other groups of classes and events.



When classes are created, they are placed into a specific time period. When enrolling students from your admin site, you are searching for a specific class that exists within a specific time period. The Time Period is visible in the Time Period pull down in the upper right corner of the screen. The page defaults to the “Active Time Periods,” meaning it will only show time periods that have been configured to be available in the system and time periods with classes in them.

Select “All Time Periods” to show courses or classes that are historical, courses that don't yet have classes associated with them or for classes scheduled in a time period that isn't available within the system.

Which browser do I use?

A “browser” is the thing that you use to search on the internet. You may have not even considered that there are a variety of different ones that you can use. We recommend using Microsoft IE version 8 or later to get the full functionality out of ASAP, but the application will work with most browsers, including Firefox and Safari. ASAP can be used on both PCs and Macs!

What’s up with the green question marks?



Hover your cursor over the green question marks for In Page Help. These are bits of information to give you extra tips along the way. Keep a look out for more

Extra Terminology

Admin Site—the site you are working on when you register students—www.asapconnected.com. This is an internal administrative site, also referred to as the “backend engine” site. You can only access this if you have:

- An account with ASAP
- A valid login and password

For your organization you will use:

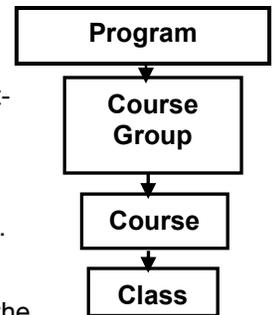
- Company ID _____
- User Name _____
- Password _____

Course/Class hierarchy

- **Program**—Optional. This is very flexible and is a level above the most basic level of organization, the Course Group,
- **Course Group**—the large umbrella that contains many courses. This is comparable to a department or category. English or Teens might be Course Groups.

Course Groups are the primary way that your customers will navigate your public site.

- **Course**—a smaller umbrella than the Course Group, the Course is the thing that is being taught. Journalism might be a specific Course within the English Course Group.
- **Class**—is the most specific of all. If English is the Course Group and Journalism is the Course, the Class would be each individual session Journalism is taught. Classes are multiple offering of a Course and each one will have specific details, including meeting times/dates and the teacher of record for each specific class.



Public Page: the page your customer can look at, also referred to as the “frontend” page. As the name implies, this is open to the public. Anyone can see this. Customers can register online from home by logging in here.

System time out: the ASAP system will time out and require users to login again after approximately 15 minutes of idle time. Simply logout and login again. This is a security feature.