



Aptify®

Choice Class Description

Aptify Choice Class Description

Duration 1 - 5 days

Class starts promptly at 9:00 am. There will be a 15-minute morning break, an hour lunch break, and a 15-minute afternoon break each day. Class ends 4/ 5:00 PM every day - may vary depending on questions & projects.

Content

Clients choose from any/all **End User, Accounting, Administrator, Developer, Developer II, Web Developer**, and **E-Business** topics to create a personalized agenda. The **All Aptify Topics for Choice Training** section in this document outlines content options with relevant time frames. Clients can select entire classes if desired.

Content taught in any format; large or small groups, one on one, repeated over multiple sessions, etc.

Clients with employees who are new/need retraining are strongly encouraged to put them through an Aptify Basics ½ day session covering the topics: **Intro to Aptify, Aptify Fundamentals, Creating & Managing Records, Views, and Reports**. Aptify Basics is repeatable twice a day to ensure groups receive individual attention.

Clients can also choose sessions conducted in a **Q/A** format around topics, rather than traditional trainer led instruction. Time Frames for Q/A format estimated based on the Topics clients select in the outline, but can be expanded based on client wishes.

Clients can include sessions that function as hands-on workshops for building **Views and Dashboards**. Sessions conducted in the clients Production DB if desired.

If desired, all or sections of the training can be conducted on Desktop Aptify as well. A separate agenda can be distributed for Desktop specific topics.

Recording: Clients can request any End User, Accounting, or Reports and Dashboard topics be recorded. All Administrator level and Create topics will NOT be recorded

Manuals: At no additional charge, clients receive relevant Aptify manual chapters (in PDF) that reflect the content covered. If a client requests training on the entire course, clients receive the complete manual (in PDF).

Pricing

Price will vary depending on whether clients select from Basic or Advanced topics and is charged at an hourly rate:

Basic: End User, Accounting, Views & Dashboards and any Add On Module: Education, Fundraising, or Advertising

Advanced: Administrator, Developer, Developer II, Web Developer, or EBusiness

The time frames listed after each topic will be used to determine the agenda content and pricing. Hours will be added for non-instruction, trainer preparation time.

Clients should reach out to Jen Frantom (Jennifer.Frantom@CommunityBrands.com) for more information re: pricing and purchasing.

Timing/Preperation

Instructor will conduct a 1-2-hour pre-class phone conference to discuss the desired topics, agenda and class length with the designated Client POC/SMEs.

The assigned Trainer will instruct predominantly on the Client's Testing DB. It is therefore critical that the **client Staging DB be updated, or have been updated recently, to reflect the current Production DB**.

When covering topics such as List Views and Dashboards, users will be encouraged to access their **Production Org**. This will provide students, when applicable, the opportunity to interface with/edit, the live system. The trainer may also utilize the Aptify Training VMs for modular specific exercises and to showcase best practices.

Prior to the Class the Trainer will require:

1. Access to the Clients DB 1-2 weeks prior to Training in order to become acclimated
2. A technical walkthrough of the DB by a client SME that can explain ANY unique processes the client desires covered in class
3. Record and process examples that the client wants used as examples/replicated in the class

Who Should Attend

- Existing Clients (Post-Go Live) only
- Any users of Aptify at Client location
- Attendance is unlimited BUT should not exceed a 10-12 maximum for a given session

Setup

- Clients will need dedicated computer per attendee with wired network connections
- Clients will need to provide projector and facility space for training
- We will provide PDF of the manual

Please contact Jennifer Frantom / Dave O'Connell at Aptify for Pricing.

ALL Aptify Topics for Choice Training

End User Level Topics

Aptify Basics

Intro to Aptify (30 Minutes)

- Introduction to End User Training
- Log in to Aptify
- Navigating Aptify
- Aptify Terminology and Hierarchy

Aptify Fundamentals (30 Minutes)

- Aptify Display
- Applications and Favorites
- Settings Button
- Managing Settings
- Quick & Global Search
- Most Recently Used Records and Views
- Spaces
- Tabs

Creating & Managing Records (1 Hour 30 Minutes)

- Records Overview
- Creating a New Record
- Record Landing Page
- Create a Persons Record
- Address Options
- Review Record History
- Cloning Records
- Wizards
- Avoiding Duplication

Views (2 Hours 30 Minutes)

- Understanding Views
- Creating List Views
- Using View Filters
- Display Fields
- Sorting Data in Views
- Advanced View Filters
- Additional Filter Options
- Using the Between Operator
- Creating a Multi-Prompt View
- Scheduling Views
- Creating a Bulk Message
- Base Views
- Creating a Chart View
- Creating a Calendar View
- Pivot Grids
- Topic Codes
- Managing and Sharing Views
- Copying and Editing Existing Views (Desktop)

Reports (30 Minutes)

- Exporting a view to Microsoft Excel
- How Reporting Works
- Running a Standard Export Report
- Running a Crystal Report

Modular Topics

Contact Logs (30 Minutes)

- Understand Contact Logs
- Creating a Contact Log Record from the Persons record.
- Using the New Contact Log Entry Wizard
- Contact Log Spaces

Case Management (30 Minutes)

- Creating Cases
- Tracking Cases

Committees (45 Minutes)

- Creating Committees
- Creating Committee Terms
- Adding Members to a Committee Term
- Editing Committee Member Information

Products & Inventory (1 Hour 15 Minutes)

- Understanding Products
- Creating a New Products Record
- Understanding Pricing
- Adding Prices to a Product
- Creating a Related Product Prompt
- Enabling Inventory Tracking
- Creating a Kit Product

Order Entry (1 Hour)

- Order Overview
- Ordering a Product
- Ordering a Multi-Line Order
- Creating a Quotation
- Company Only Orders
- Ordering a Kit Product
- Making a Partial Payment for an Order
- Applying a Discount
- Marking Orders as Shipped
- Creating a Bulk Order
- Canceling an Order with the Order Cancellation Wizard

Payments (30 Minutes)

- Making a Payment
- Multiple Payments to an Order
- A Single Payment to Multiple Orders and to Multiple Order Lines
- Processing Over Payments

Membership Dues & Subscriptions (1 Hour)

- Creating a Membership Dues Product
- Ordering a Membership Dues Product
- Manually Renewing Subscriptions
- Auto-Renewing Subscriptions
- Fulfilling the Auto-Renewal Standing Order
- Using the Order Cancellation Wizard to Cancel a Subscription

Campaign Management (45 Minutes)

- Setting up a Campaign
- Adding Prospects to a Campaign
- Creating a Campaign Segment
- Applying Campaign Discounts to an Order

Meeting Management (1 Hour)

- Using the New Meeting Wizard
- Creating Meeting Registrations
- Placing a Person on the Wait List
- Canceling a Meeting Registration
- Transferring a Meeting Registration
- Closing a Meeting

Awards (30 Minutes)

- Defining Award Types
- Tracking Award Nominations

Sales Force Automation (30 Minutes)

- Understanding Sales Force in Aptify
- Creating Opportunities Records

Expo Management (45 Minutes)

- Creating an Expos Record
- Venues & Floorplans
- Adding Booths to Floorplans
- Working with Booths
- Copying an Existing Floorplan
- Linking Meetings to Expos
- Taking an Order for an Expo Booth
- Canceling a Booth Reservation

Publication Functions (30 Minutes)

- Altering the Delivery Schedule of a Publication
- Understanding How to Use the Fulfillments Service
- Adding Publication Contributors

Accounting Topics

Accounting 101 (1 Hour) (Optional)

- Overview
- Accounts
- Key Accounting Concepts
- Double Entry Accounting
- Accounts Accrual Method
- Account Balances
- Account Adjustments
- Financial Management Systems
- Aptify Accounting

General Ledger (GL) Accounts (1 Hour 15 Minutes)

- Overview
- GL Accounts and GL Entries
- Creating GL Accounts
- GL Account Services
- GL Account Types
- GL Order Levels
- GL Entry Generation
- Placing an Order to Create GL Entries

Configuring Products (1 Hour)

- Overview
- Product GLs
- Tracking Inventory and COGS Product
- Creating a Product Category
- GL Accounts and the Organization Level
- Create a Product
- Adding Sales Tax and Jurisdiction
- Additional Tax Settings

- Order a Product
- Product Cost Tracking
- Cancellation Fees
- Create a Cancellation Fee Product

Deferred Revenue & Scheduled Transactions (30 Minutes)

- Deferred Revenue Accounts
- Scheduled Transactions
- Scheduled Transaction Groups

Payments and Refunds (30 Minutes)

- Overview
- Payment Types
- Payment Levels
- Crediting A/R Accounts
- Issuing Credits and Refunds
- Applying Credits
- FMS Integration
- Pre-Paid Deposits

Reconciliation & Batching (30 Minutes)

- Types of Batches
- Reconciliation and Batching
- Accounting Periods
- Accounts Receivable Report
- Create and Orders Batch
- Cash Control Batches and Lock Boxes
- Create a Cash Control Batch

Multi-Entity Accounting (30 Minutes)

- Overview
- Organization GL Accounts
- Products & Product Categories
- Buying Products from Separate Entities

Administrator Topics

Administrator Training Overview (45 Minutes)

- Course Outline
- Training Goals

User Accounts (1 Hour)

- User and Group Administration Overview
- Importing a License Pack
- User Security Types
- Aptify Licenses
- Creating, Enabling, and Disabling Users
- Preferences and Profiles
- Modifying the Login Process

Advanced View Management (1 Hour 30 Minutes)

- Managing Views
- Advanced View SQL
- Creating and Copying Views
- Reassigning Views
- The Views Service

Creating Dashboards (2 Hours)

- Dashboard Structure (Areas, Parts, Components)
- Creating a Dashboard
- Building Button Bars
- Adding Views/Web Browsers
- Dashboard Display Logic
- Managing Dashboards for Users
- Assigning Dashboards

Bulk Messaging (1 Hour)

- Message Sources
- Creating Message Parts and Templates
- Generating Message Schedules
- Message Runs
- Message Systems
- External Mail Service Integration

Introduction to Entities (1 Hour 30 Minutes)

- Assigning Entities to Applications
- Modifying Entity Attributes
- Types of Fields
- Creating and Modifying Fields
- Entity Field Options
- Viewing Data Across Services
- Creating Multiple Base Views

Sub-Type Entities (1 Hour 30 Minutes)

- Creating Sub-Type Entities
- Creating Sub-Type Fields
- Adding Sub-Type Security
- Using the Virtual Field Wizard

Configuring Security (45 Minutes)

- User/Group Security Model
- Security Best Practices
- Security Types
- Creating Security Groups
- Entity Security
- Field Level Security
- Attachment Security
- Recordset Query Limitation

Form Template Administration (45 Minutes)

- Form Template Metadata Model
- Form Template Display Logic
- Copying Form Templates
- Using the Visual Designer
- Assigning Preview Panes
- Personalizing Tab Layout
- Preventing Form Modifications

Data Operations and Management (45 Minutes)

- Importing Data
- Creating Entity Bulk Operations
- The Process Pipeline
- Packing Data
- Database Maintenance

Developer I Level Topics

Architecture (1 Hour)

- Core Technologies
- Metadata Applications
- Metadata Services
- Data Model and Objects Introduction
- Aptify Framework Applications and Functionality
- Aptify Business Applications

Entity Configuration (4 Hours 15 Minutes)

- Entity Features
- Entity Field Basics
- Script-Based Validations
- Database Objects
- Entity Attributes
- Advanced Entity Topics
- Embedded Objects
- Direct Object Access
- Virtual Fields
- Optional Embedded Objects
- Virtual Entities
- Entity Best Practices
- Building the Class Project Entities

Process Pipeline (3 Hours)

- Process Pipeline Structure and Data Structure
- Process Flows
- Process Flow Steps
- Process Flow Components
- Process Flow Debugger

- Using Variables and Static Values
- Aptify Events
- Scheduled Execution
- Event Data Structure
- Event Definitions
- Event Handlers
- Synchronous and Asynchronous Execution
- Multiple Step Process Flows
- CRUD Components
- Value Tester and Value Retriever Components
- Staging Entities
- Record Validation
- Compilations
- Script Steps
- Sub-Processes
- VB Scripts

Form Templates (1 Hour)

- Visual Designer
- Visual Designer Actions
- Modifying Forms
- Adding and Removing Controls
- Adding a Single Field Control
- Adding a Data Combo
- Form Template Metadata
- Form Template Hierarchy

Wizards (1 Hour)

- Uses of Wizards
- Data Entry Wizards
- Batch Processing Wizards
- Entity Bulk Operations – Alternative to Wizards
- Development Methodologies
- Metadata Wizards
- Code-based Wizards
- Metadata Wizard Design
- Creating Metadata Wizards
- Controlling Wizard Page Flow

Reports (30 Minutes)

- Crystal Report Development
- Tools to Develop Crystal Reports
- Integrating Reports in Aptify
- Report Wizard at Run-time
- Creating a List Report/Creating a Grouped Report

Data Archiving (30 Minutes)

- Reasons for Archiving
- Key Areas
- Preventive Strategies
- Archiving
- Creating a Lists Archive

Configuration Migration (30 Minutes)

- Methodology
- Using the Entity Packer and Unpacker Wizards
- Using the Data Packer and Unpacker Wizard
- Packing Form Templates

Developer II Level Topics

Architecture (1 Hour)

- Required Technologies
- Configuration Design Methodology
- Introducing the Trouble Tickets System
- Installing the Trouble Tickets System

Aptify Form Template Layout Controls (2 Hours)

- Overview
- Understanding Form Template Layouts
- Hello World Form Template Layout Control
- Binding Variables to Controls
- Capturing Events and Controlling Behavior

Fundamentals of Aptify Code-Based Development (2 Hours)

- Overview
- Coding Methodology Overview
- The Five Critical Aptify Objects
- Generic Entity
- Aptify Application
- Exception Manager
- User Credentials
- Create Initial Trouble Ticket Activities Record (GE)
- Log the Correct Employee (User Credentials)
- Validating Software Titles (AptifyApplication and DataAction)

Process Flow Components (2 Hours)

- Overview
- Design Methodology
- Class Creation
- Trouble Tickets Email
- Use Message Runs

Entity Plugins (2 Hours)

- Overview
- Plugin Design Methodology
- Class Creation
- Installing an Entity Plugin in Aptify
- Validate Trouble Ticket
- Close Trouble Ticket Function

Advanced Form Template Layouts (15 Minutes)

- Overview
- Creating PC Type Buttons
- Controlling Data Transfer

Form Components (15 Minutes)

- Overview
- Design Methodology
- Class Creation
- Serial Number Control

Dashboard Components (15 Minutes)

- Overview
- Plugin Design Methodology
- Class Creation
- Installing a Dashboard Component in Aptify

Wizards (15 Minutes)

- Overview
- Design Methodology
- Class Creation
- PC Entry Wizard

Web Developer Level Topics

Configuration Migration Tool - Unpacking (1 Hour)

- Download and install the CM Tool
- Unpack the Trouble Tickets Application

Trouble Tickets Application Overview (1 Hour 30 Minutes)

- Data
- Application
- Entities
- Views
- Wizards
- Event Handlers
- Dashboard and Dashboard Components
- Form Templates and Form Components
- Web-Only Form Templates

Metadata Generation (30 Minutes)

- Generate HTML 5 Web UI Part Metadata Items
- Generate HTML 5 Web Entity Metadata
- Generate HTML 5 Web Form Template UI Parts
- Generate HTML 5 Web View Metadata
- Generate HTML 5 Web Dashboard UI Parts
- Generate HTML 5 Web Culture Metadata

Quick Search Configuration (1 Hour - 30 Minutes)

- Search Configurations
- Search Configuration Entities
- Create Trouble Tickets Search Configuration Entity
- Configuring Search Fields
- Setup a Search Configuration Entity for PCs
- Add the Primary User as a Search Field
- Advanced Search Algorithms

Entity Card Configuration (1 Hour - 30 Minutes)

- Design the Trouble Tickets Entity Card
- Fields on the Trouble Tickets Entity Card
- Create the Trouble Tickets Entity Card
- Create the HTML UI Part for the Card
- Create the Entity Card and Connect the HTML UI Part
- Test the Title-Only Card
- Complete the HTML UI Part
- Test and Debug the Full Card
- Add Fields to Return to the Search Configuration Entity

Auto Link Configuration (2 Hours)

- Auto Link Configurations
- Auto Links
- Create an Auto Links record for Trouble Tickets
- Auto Links Beyond Spaces
- Soft Links
- Enable Soft Links for the Resolution field of Trouble Tickets
- Auto Links in HTML Form Components
- Convert the Trouble Tickets. Resolution Form Template to an HTML Text Field
- Test the Resolution Auto Links
- Create a Resolution Auto Link Configuration
- Create Auto Links
- Use the Resolution Auto Link Configuration
- Test the new Auto Link Configuration

Space Action Configuration (2 Hours)

- Create Space Actions
- Space Action Inputs
- Create Space Action Inputs
- Space Action Process Flows
- Input Properties
- Result Codes
- Create the Space Action Process Flow
- Test out your Space Action
- Add a Link to the Trouble Tickets in the Space Thread

Form Template Configuration (2 Hours)

- Form Template Bindings
- Bind able Properties
- Form Template Part Binding Filter Rules
- Trouble Ticket Titles
- Disable the Title
- Software Title Manufacturers
- Plan the configuration
- Create the Hidden Filter Function
- Test the Hidden Filter
- Disable the Manufacturer Linkbox

E Business Level Topics

E-Business Requirements (30 Minutes)

- Web Server Requirements
- Database Server Requirements
- Content Management System Requirements
- End User Browser Compatibility
- What's Available in E-Business
- Design Concepts

E-Business Sample Site (2 Hours 30 Minutes)

- Home Page
- Creating a Web User
- Products
- Online Order Entry Features
- Place an Order
- Meetings
- Register for a Meeting
- Purchase a Membership Product
- Education
- Customer Service
- Modify Profile Information
- Save and Load and Shopping Cart
- Pay a Balance on the Web
- Renew a Membership or Subscription
- Downloadable Products
- Community
- Create an Abstract
- Add a Member to the Directory
- Post on the Forum
- Create a Market Place Listing
- Participate in a Survey

- Enroll in a Committee
- View a Web Article
- RSS Feeds
- Chapter Management
- Manage My Group
- Edit Company Information
- Substitute a Meeting Attendee
- Add New People
- Enroll New Members
- Shopping Cart

Configuring E-Business with Metadata (2 Hours 30 Minutes)

- Web Users
- Creating Web Users
- Logging in to E-Business
- Web Groups
- Web Modules
- HTTP Module Security
- Tracking Web Activity
- Creating A Web Module
- Assigning Users to a Web Module
- Web Menu - Creating Web Menus
- Web Articles
- Creating and Managing Topic Code Web Articles
- Creating Web Articles

Working With Sitefinity (1 Hour)

- Changing Appearance without Changing Code
- Master Pages in ASP.NET 4.0
- Modifying the ICE Site's Appearance
- Modifying the Home Page's Content
- Add a Page for the Site Tools Menu

Creating New E-Business Pages and Controls (3 Hours 30 Minutes)

- Adding new functionality
- Creating User Controls in Visual Studio
- Error Handling
- Creating New Pages
- User Control Generator
- Moving Controls to E-Business
- Adding User Controls to Sitefinity
- Creating Web Pages
- Creating Menus
- Setting Redirect URLs for Web Pages

Modifying User Controls with Visual Studio (1 Hour)

- Modifying User Controls
- Record Controls
- Grid Controls

Development tools and Coding Best Practices (1 Hour)

- E-Business Development Tools
- Server Controls
- User Controls
- Aptify User Controls
- Coding Best Practices
- Overall Recommendations
- Developing New Site Areas
- Server Control Configuration
- Business Logic Changes

Debugging (30 Minutes)

- Debugging
- Viewing Session Exceptions

SQL Injection Prevention (30 Minutes)

- Overview
- Recommendations

Web Services (30 Minutes)

- Web Services
- Aptify Web Services Generator
- Creating Web Services
- Using Web Services with E-Business

Using the Generic Entity with E-Business (1 Hour 30 Minutes)

- Using the Generic Entity
- Preparing Aptify
- Preparing E-Business
- Creating Controls and Web Pages
- Adding Menus
- Testing

Class Project: Membership Application (1 Hour)

- Unpacking Membership Application
- Membership Application User Control
- Installation
- Testing and Analysis

E-Business Configuration Files (30 Minutes)

- Web.config
- Aptify_UC_Navigation.config