




APRIL, 2022

YMCA ENROLLMENT PORTAL

USER'S GUIDE AND MANUAL

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Definitions

Classes

A class is a course or event offered at the Y in which patrons can enroll. Each class created within the Y enrollment portal represents a single schedule offering of a course (e.g., there can be multiple groups of swimming lessons each with different participants; each group is called a “class”).

Schedule

Every class in the software has a configurable schedule. A class’s schedule contains any number of individual schedule sessions. A schedule session has a few attributes:

- **First Date**—the first (or only) date of the schedule session entry.
- **Start Time**—time of day when the session starts.
- **Duration**—length of the session in minutes.
- **Recurrence**—each of the sessions can repeat at an interval, or not at all. Sessions can repeat:
 - Never (only occurs once).
 - At a fixed interval of days for a specified number of occurrences.
 - At a fixed interval of days for an indefinite period.

Each class can have a schedule with a complex set of repeating and/or non-repeating sessions to cover situations such as:

- Meeting once a week on one or more days every week.
- Meeting on a series of specific days, or a single specific day.
- A single-day event such as a run.
- Meeting every week for rehearsals, then having one or more performance(s).

Note: *Changes cannot be made to a schedule if at least one patron is enrolled.*

Enrollment

Every class can offer either a fixed or unlimited number of seats. Users can enroll and take these seats within the duration of a specified enrollment period. Class offerings can also vary depending on whether a patron holds a valid Y membership.

By setting separate member and non-member enrollment times, classes may be offered earlier (or even exclusively) to membership holders. To make a class exclusive to valid members, disable enrollment for non-members.

Note: *Before any patrons can enroll in a class, the class must also be enabled for enrollment (i.e., check the checkbox labeled “Allow Enrollment”).*

Pricing

Optionally, a class can require a payment to enroll. Setting a price of zero will allow enrollment with no fee payment. There can be two separate prices for members and non-members.

Payments are required at the time of enrollment; thus, any enrolled patron must have paid their fee.

Prerequisites

To allow multiple classes with the same or similar course content, a class can have two sets of alphanumerical “prerequisite codes:”

- **Required**—These are the prerequisites which must be fulfilled to enroll.
- **Fulfills**—These prerequisites will be added to a member’s account if they pass the class.

The prerequisite codes indicate both course content which courses require before starting, and content which the course teaches which can be useful in later classes.

If a patron passes a class, the “fulfills” set of prerequisites will be added to their account as “fulfilled.” In a case where an admin wishes to manually override a user’s prerequisite fulfillment (e.g., to allow them to enroll in a class they previously could not), they can view a user account to add or remove earned prerequisites.

Accounts

Multiple types of accounts can exist, depending on whether a user is a valid Y member and/or a YMCA admin. An account can be an admin or a member with mutual exclusivity, such that a Y admin can use their same account to both manage classes and participate.

Each account is associated with a single individual and a unique email address.

Admin

If an account is an admin, they can manage class and user data. This includes access to enrollment histories for classes and users, the ability to grant admin privileges to other accounts, the ability to create classes, the ability to modify and cancel classes, and the ability to change user data and delete accounts.

An account marked as an admin is all-powerful in the application and can access sensitive information. Only Y employees should be able to access admin options and should use them with discretion.

Non-member

An account is considered a “non-member” if the user has no active membership (i.e., they never had one, or their membership is expired). Non-members may be limited in what classes they can join, and when they can join them. It may also affect pricing for some classes.

Member

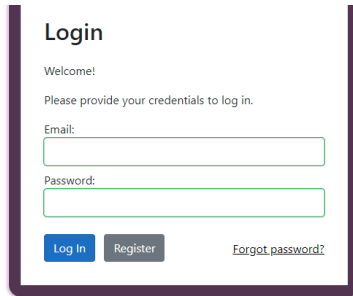
An account is considered a “member” if the user has a valid membership. A non-member can be granted membership (or have their membership renewed) by entering a new membership expiration date in the user management section.

The software does not offer a method of purchasing membership. Patrons should instead buy a membership in person or over the phone, and a Y admin should enter the changed or renewed membership data in the software.

Registering a New Account

Patrons and Y admins both self-register through the registration form. Users follow through a few steps:

- Navigate to the registration form. This can be found when not logged in and viewing the login form.



The screenshot shows a 'Login' form with a purple border. It includes a 'Welcome!' message, a prompt to provide credentials, and input fields for 'Email' and 'Password'. At the bottom, there are 'Log In' and 'Register' buttons, and a link for 'forgot password?'.

Login

Welcome!

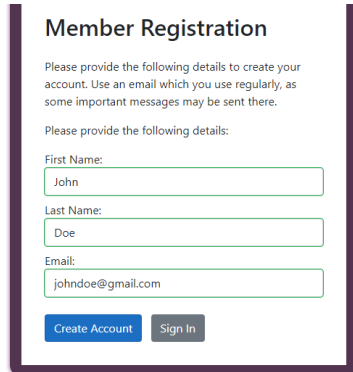
Please provide your credentials to log in.

Email:

Password:

[Log In](#) [Register](#) [forgot password?](#)

- Enter user information to start the registration process.



The screenshot shows a 'Member Registration' form with a purple border. It includes a prompt to provide details for account creation, a list of required details, and input fields for 'First Name', 'Last Name', and 'Email'. At the bottom, there are 'Create Account' and 'Sign In' buttons.

Member Registration

Please provide the following details to create your account. Use an email which you use regularly, as some important messages may be sent there.

Please provide the following details:

First Name:

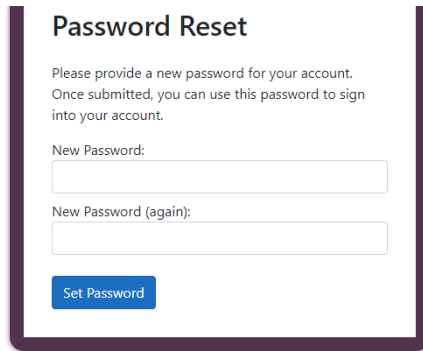
Last Name:

Email:

[Create Account](#) [Sign In](#)

Note: the email must not be associated with any existing accounts.

- Click “Create Account.” A confirmation email will be sent to the specified email address. Be sure to check the spam folder.
- Using the link provided in the email, continue the registration process.



Password Reset

Please provide a new password for your account. Once submitted, you can use this password to sign into your account.

New Password:

New Password (again):

[Set Password](#)

- Enter a secure password and repeat it where prompted.
- Click “Set Password” to complete the registration.
- The user can now log in with that password.

Convert to Admin

The new account can be converted into an admin. To do so, follow these steps:

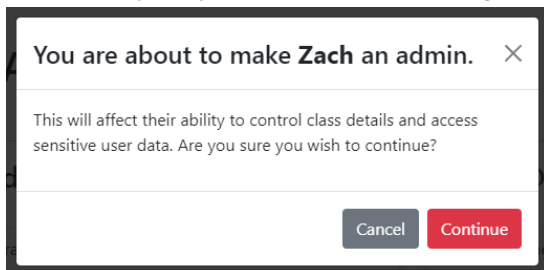
- While logged in as an admin, navigate to “Member Accounts” in the sidebar.
- Find the new account (use filters in the top right) and click “Edit.”
- Use the “Make Admin” button (if the button displays “Make Not Admin,” note that the user is already an admin).



◀ User Account Editor

[Delete User](#) [Make Admin](#)

- You will be prompted to confirm the change.



Convert to Member

- Find the account in the “Member Accounts” page. Click “Edit.”
- Enter a new membership expiration date in this card. This is the date when the new membership will expire.

A form titled "Membership Expiration". The text inside says: "Zach is not a member. To make them a member, enter and save an expiration date." On the right side, there is a label "Expiration Date:" followed by a text input field containing the placeholder "mm/dd/yyyy" and a calendar icon. Below the input field is a blue "Submit" button.

- Click “Submit” to save the change.
- If the entered date is after the current date, the patron is now a member.

Creating a Class

Class offerings are entered by Y admins before patrons can view them and enroll. There are several steps to set up different aspects of a class listing.

Below are a few operations which admins can perform.

Basic Details

This section focuses on entering basic class details such as the class name and description.

- As an admin, navigate to “Manage Classes” in the navbar. Click the plus sign to create a new class.



- First, enter basic class data such as a class name and short description. Optionally, add a longer description which will be displayed in the class’s detail page.

Manage details for 'New Class'

Class name:*

New Class

Class location:

Short description:*

Detailed description:

☐ Allow Enrollment (within dates)

☒ Show Publicly

Class Fulfills

Add +

Class Requires

Add +


- To set up prerequisites, use the “Add +” button to add “prerequisite codes.” The values for these fields are auto-filled from other classes in the software, but new prereq codes can be added by selecting “Create new code” from the “Add +” dropdown.
- Add the prerequisite codes which the class requires prior to enrollment.
- Add the prerequisite codes which the class fulfills.

Class Photos

Each class has slots for a customizable thumbnail and class page photo. Use the photo upload feature to add custom photos for the class.

Custom Course Photos


Thumbnail



Choose File

No file chosen

Page Photo




Choose File

No file chosen

The thumbnail will appear in the class listings.

Admin actions

Open early for Y members!




Swimming Lessons - Pike Level

Introductory swimming lessons for beginner to intermediate swimmers

Learn more

Admin actions

Open early for Y members!




Swimming Lessons - Shark Level (A)

A more advanced swimming course for stronger swimmers

Learn more

Admin actions

Open early for Y members!

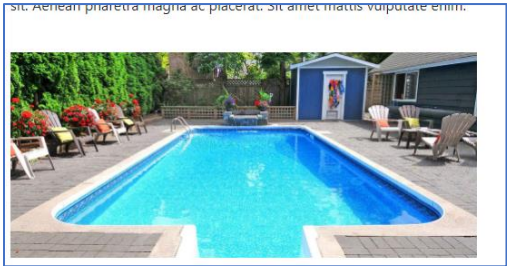


Swimming Lessons - Shark Level (B)

A more advanced swimming course for stronger swimmers

Learn more

The page photo will appear in the class details page.



Enrollment and Pricing

Use this section of the class editor to set enrollment window start date, duration in days, and pricing for members/non-members.

Click the checkbox labeled “Allow non-members to join this class” to allow non-member enrollment. This checkbox also shows the second enrollment window and price settings for non-members.

Pricing and Enrollment

Settings for Members

Enrollment start date:

04/24/2022

Length (days):

21

Class fee for members:

\$

0.00

Settings for non-members

☒ Allow non-members to join this class

Enrollment start date:

05/01/2022

Length (days):

21

Class fee for non-members:

\$

48.00

Note: Even if these enrollment periods are set, patrons cannot enroll unless the “Allow Enrollment” checkbox is ticked.

Enter a value in this card to set a seat limit on the class. Enter zero for unlimited seats.

Enrolled Patrons

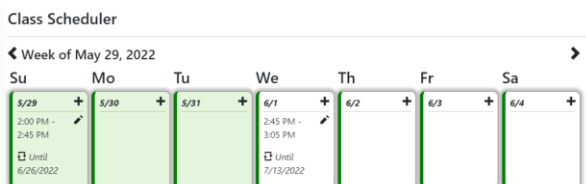
Enrollment status

Seat limit (zero for no limit):

8

Scheduling

Class schedules are configured using this week calendar at the bottom of the class editor.



- Use the “+” button to add a session on a particular day.
- Use the pencil button to edit an existing session on a particular day.
- Use the chevron buttons to move from week to week.

When creating or editing a class schedule session, enter the details in this popup dialog.

Edit Schedule for '5/29/2022'

First occurrence date:

05/22/2022

Start time

02:00 pm

Duration

45

(minutes)

☒ Session repeats

Recurrence Settings

Repeats every 7 days

and occurs for a fixed time.

5 time(s).

(Last day would be Sunday, June 26, 2022)

Delete

Cancel

Submit

- Enter or change the “first occurrence date.”
- Choose a start time and duration.
- Decide whether the session repeats or occurs once.
- Enter settings to specify how the class repeats. (*optional*)
- Click “Submit.”

Note: *Class schedules cannot be edited if at least one patron is enrolled.*

Note: *No two class schedule sessions can overlap. The user will be presented with an error if they attempt to save a schedule session which conflicts.*

Note: *Class schedules cannot start before or during the class enrollment period.*

Note: *A schedule can contain any number of sessions, each of which can individually repeat or not repeat at their own intervals. Be aware that schedule sessions cannot conflict; the software performs checks.*

Class Actions

Admins can cancel and delete classes, each of which prompt for confirmation to avoid accidental actions. Use the “Save Changes” button to save any changes made within the class editor. None will take effect until saved.



Note: *After canceling a class, enrolled patrons will be able to see it is canceled.*


Note: *Deleting a class also deletes its enrollment history, and patrons will no longer see the class in the software.*

Enrolling in a Class

Patrons can browse and enroll in classes through the “Browse and Enroll” page found on the side navbar. Users


Browse and Enroll

Find fun new classes to add to your schedule




Swimming Lessons - Pike Level
Introductory swimming lessons for beginner to intermediate swimmers

Learn more



Swimming Lessons - Shark Level (A)
A more advanced swimming course for stronger swimmers

Learn more



Swimming Lessons - Shark Level (B)
A more advanced course for strong swimmers

Learn more

can search for a specific class by name, or just browse for a class and then click “Learn More.”

Class fees for members and non-members are listed in this side card. If non-members are not allowed to

Enrollment Information

Interested in this class? Continue reading to enroll.

Membership and Fees

Both members with paid memberships and public non-members may enroll and participate in this class.

\$48⁰⁰
For membership holders

\$96⁰⁰
Without membership

enroll, their price will be replaced with a lock icon.

Additional information and the class schedule is located in the enrollment card at the bottom right, which is also where enrollment eligibility is displayed.

Open Seats

Holding sessions
@ Main Pool

Starting on Sunday, May 22, 2022

This class opens for non-members starting **Sunday, May 1, 2022**

Class Schedule

◀ Week of May 22, 2022 ▶

Su	Mo	Tu	We	Th
5/22 5:00 PM - 5:40 PM	5/23	5/24	5/25	5/26

There are several things which can be displayed here.

Possible states include:

- **Enrollment is closed**—If the enrollment period has passed or is not yet open, or if enrollment is frozen, that will be displayed.
- **Not enough seats**—if all seats are taken, no more patrons can enroll, and a warning is displayed.
- **Exclusive to members**—if a class is unavailable to non-members and the patron is a non-member, they are notified.

- **Open for enrollment**—The patron can enroll, their specific price is shown, and a button to start the enrollment process is also displayed.
- **Schedule conflict**—The user could normally enroll, but the schedule would conflict with other enrollments.
- **Class is canceled**—If the class is canceled and the patron manages to browse to its detail page, they are notified of the cancelation.

If the “Enroll” button is visible, the user can enroll in the class. Click the button to begin. If the class has no fee, enrollment is already done!

If the class requires a fee payment, a dialog will show to accept payment information. Enter a credit or debit card.

The image shows a "Make a Payment" dialog box with a close button (X) in the top right corner. The form contains the following fields:

- Cardholder Name:** A text input field.
- Security Code:** A text input field.
- Card Number:** A text input field with a dotted pattern (.....) indicating where digits should be entered.
- Expiration Date:** A date picker showing "April 2022" with a calendar icon.
- Postal Code:** A text input field.

At the bottom right of the form, it says "Total due: \$20.00". Below this, there are two buttons: "Cancel" (gray) and "Pay" (blue).

The patron will be enrolled as soon as they successfully enter payment details and click “Pay.”

