



Academic Center Administration Software

<http://www.engineerica.com>

Reference Manual for AccuSQL/AccuTrack 2019

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WELCOME TO THE WORLD OF ACCUSQL & ACCUTRACK

Congratulations! You have acquired a very powerful software solution for your center. We are sure you and your visitors will enjoy and benefit greatly from the many features of AccuSQL/AccuTrack. From the beginning, this software was built on the feedback of administrators and staff members in academic centers such as yours. AccuSQL/AccuTrack has grown over the years from a basic attendance program to truly comprehensive learning center software.

Here are just a few of its capabilities:

- Tracking and reporting on students' attendance.
- Reporting on the usage and utilization of your services.
- Providing a student intake system (waiting list)
- Managing appointments, including matching students and staff, scheduling, email notification and reminders, room reservations, and no-show tracking.
- Enabling staff to submit their own appointment schedules for review and approval by system administrators.
- Tracking walk-in sessions.
- Keeping a session log and session questionnaire
- Tracking loaned material.
- Analyzing traffic and peak usage times via *Excel* charts and tables.
- Rating staff.
- Tracking staff work-hours and calculating pay.
- Collecting feedback via periodic visitors surveys.
- Reporting on visitors' demographics / profile information with custom queries.
- Program Assessments.
- Tracking student athletes and their required hours.
- Managing registration and attendance tracking for seminars or workshops.
- Automatic report delivery scheduling for instructors.
- Sophisticated capabilities for controlling how each of your centers' are configured and behave using Local Lab Assignments, all in one database!

- Aiding in student retention through the use of Student Success Plans.
- Providing a Messaging Center with multiple delivery methods.
- Portable attendance tracking with Apple devices using iAccu.
- Powerful custom query generator.
- And much more!

All in one convenient package!

With your help and support, we will continue to improve and expand AccuSQL/AccuTrack. Please submit your suggestions via the online suggestion box:

<http://accu.uservoice.com>

Finally, we would like to thank you for ordering AccuSQL/AccuTrack. We hope you will enjoy using the software as much as we enjoy developing it.

Sincerely,

Mon Nasser,

Product Manager

WHAT IS THE DIFFERENCE BETWEEN ACCUSQL AND ACCUTRACK?

AccuSQL and AccuTrack usage is almost identical. The difference between the two programs is related to the database they use. AccuSQL uses a Microsoft SQL Server database while AccuTrack uses a Microsoft VFP 9 database. While this manual uses AccuSQL for most of the screen shots in the program, the functionality of those screens is almost identical to AccuTrack. Sections in this manual that are specific to AccuTrack will be indicated with a “For AccuTrack only” tag. The “For AccuTrack only” sections are related exclusively to database operations.

HOW TO USE THIS MANUAL

This manual contains detailed descriptions of the AccuSQL/AccuTrack screens and functions. Before using this manual we recommend that you go through the accompanying AccuSQL/AccuTrack *Quick Start* Manual. The Quick Start manual shows the “big picture” and how the various AccuSQL/AccuTrack parts fit together. It also provides a quicker introduction to AccuSQL/AccuTrack.

After reading the Quick Start Manual read this manual for a detailed look at the software. This manual has the same structure as the AccuSQL/AccuTrack screens. You can use this manual as a reference for detailed information on a certain screen by going to the pages describing it.

AccuSQL/AccuTrack can be customized via its options screen to match your center’s needs. One of the many items you can customize is terminology. For example, a tutoring center can use the term “tutor”, while an advising center can use the term “advisor” Other terms you can change include category, activity, semester, and seminar. Further, as of version 2016, you can even control terminology at the Local Labs level. **Keep this in mind while you read the manuals.** For example, if you are using the software in an advising center, think “advisor” whenever you see the word “tutor”, and so on.

Also keep in mind that the background image of the software and also the button colors and title bars can be customized, so these elements might be different for you than the one shown in this manual. For this manual, the background of AccuSQL/AccuTrack has been set to the default Gray background and the button and title bar colors are the default blue.

Finally, if you find errors in this manual or if you have ideas on improving it, please email us at support@accutrack.org. We look forward to hearing from you!

INSTALLATION

For AccuSQL/AccuTrack, you will be installing the software on all of the various sign in stations and administrator computers that will be using it. The other part of the installation involves transferring a database to SQL Server. This can be either an older AccuTrack database, if you are upgrading from AccuTrack, or creating a new blank database. If you have an older AccuSQL database that you want to upgrade for use with a newer version of AccuSQL, there is a file called SQLDataUpdater.exe that you would run against the database to upscale it to the latest version.

If you have an older version of AccuTrack or AccuSQL installed on the PC, you can install the 2019 version alongside the older version. If you intend however to uninstall the older product first, it is recommended that you do so before installing the newer version.

HARDWARE REQUIREMENTS

You can run AccuSQL/AccuTrack on XP, Vista, 7, 8, 10 and Windows Server versions later than Windows Server 2003. For optimal performance, we recommend at least this configuration for the clients:

- 2 GHz or faster processor.
- 1GB or more of RAM.
- 200 MB of free hard drive space (modern computers come with > 100 GB).
- SVGA Video Card capable of displaying at least 256 colors at a screen area of 1024*768.
- 17" monitor.
- A printer for printing out reports. You can use a local or a network printer.
- USB drive for installing the software.
- Keyboard and mouse.
- Microsoft Excel (needed for charting and for some high-level administrative reports).
- A network card and connection to access the data remotely. 1 Gigabit preferred.
- An ID reader. We provide readers that were tested with the AccuSQL/AccuTrack software.

 **Note:** AccuSQL/AccuTrack was designed for a screen area of **1024*768**. If your computer is running at a larger area, AccuSQL/AccuTrack will be centered on your computer's screen.

For the server, we recommend at least Windows Server 2003 with SQL Server 2005 or later. We use the standard requirements by for Microsoft for [MS SQL Server 2008R2](#) for our server requirements.

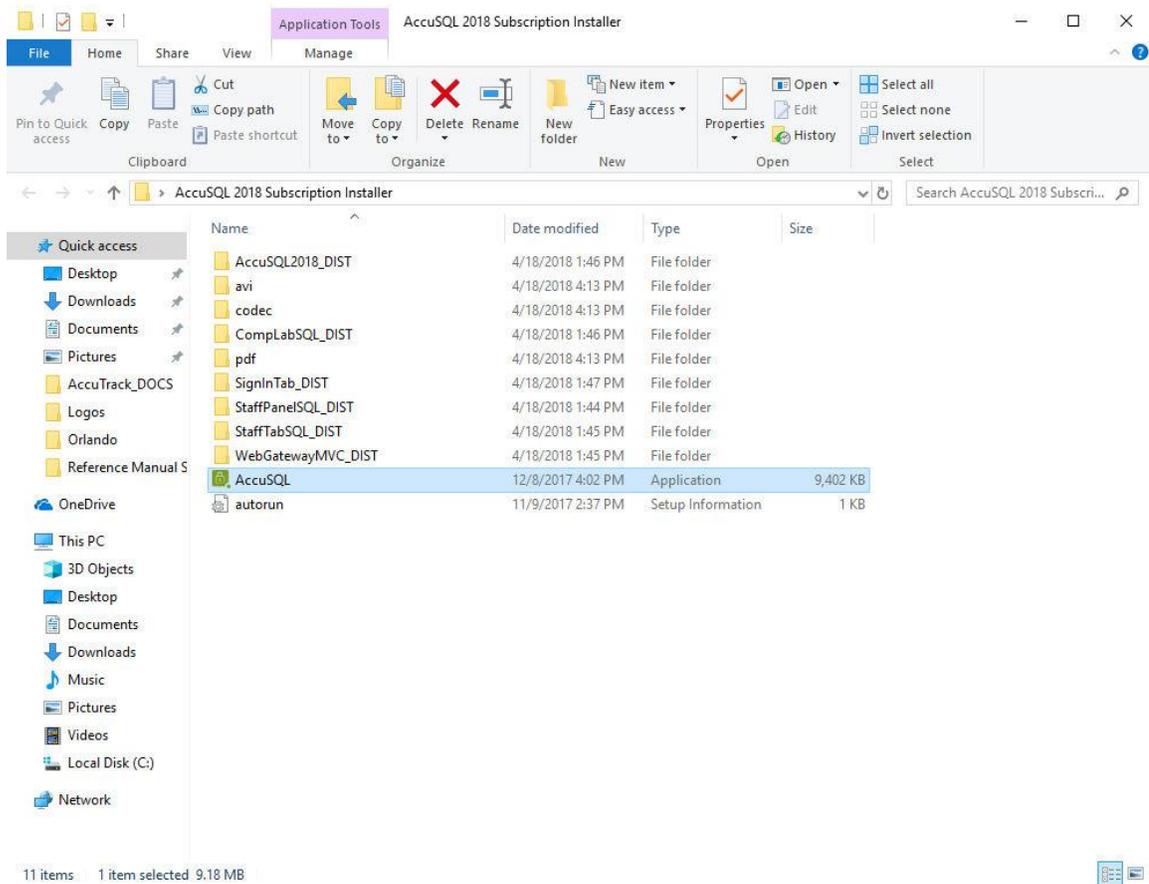
INSTALLING ACCUSQL/ACCUTRACK

- [View a video](#) on installing AccuSQL 2019
- [View a video](#) on installing AccuTrack 2019

AccuSQL/AccuTrack comes with an easy to use installation program.
Insert the Engineerica USB key. Note: Your contents may look slightly different.



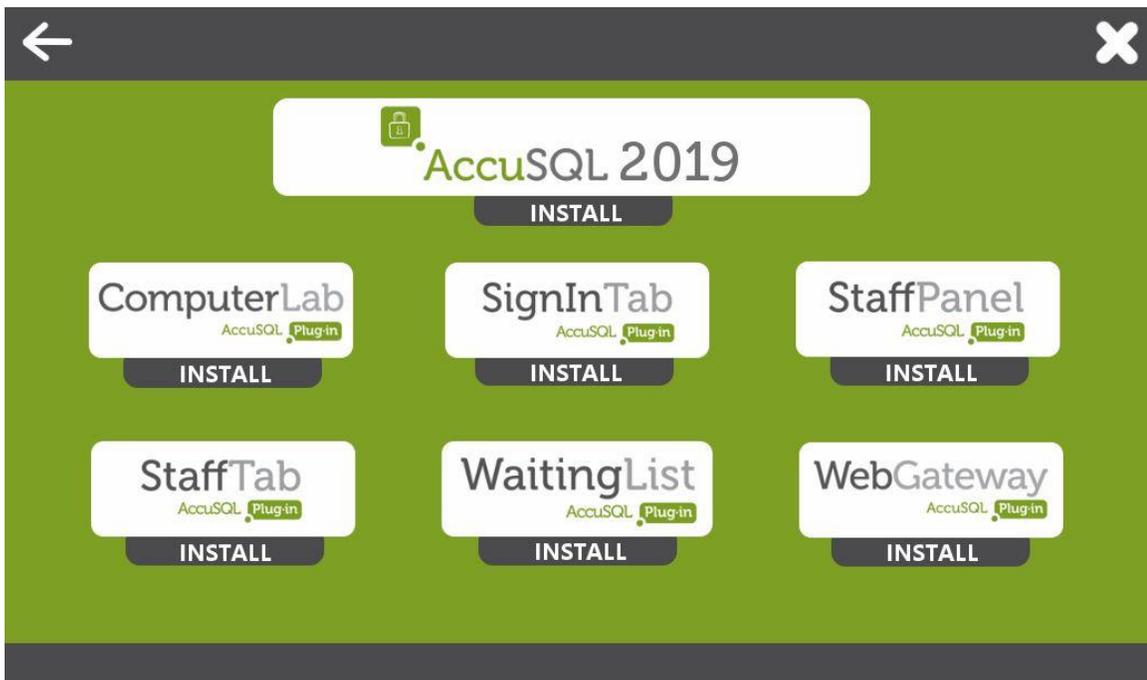
1. Click on the option to “Open folder to view files”



2. Run the Installer launcher AccuSQL.exe or AccuTrack.exe file by double clicking on it.



3. Click on the product you would like to install. **Note:** If you prefer to install the software directly, you can run the setup.exe program from the AccuSQL2019_DIST folder for AccuSQL or setup.exe from the Accu2019_DIST folder for AccuTrack.



4. Follow the onscreen instructions to install AccuSQL/AccuTrack, Staff Panel, Staff Tab, Computer Lab Plug-in, or Web Gateway MVC. Note: Depending your license type, you may not have all of these options available.

 **Tip:** You can go directly to the AccuSQL2019_DIST folder and run setup.exe to install AccuSQL 2019 or for AccuTrack, go to the Accu2019_DIST folder and run setup.exe to install AccuTrack 2019.

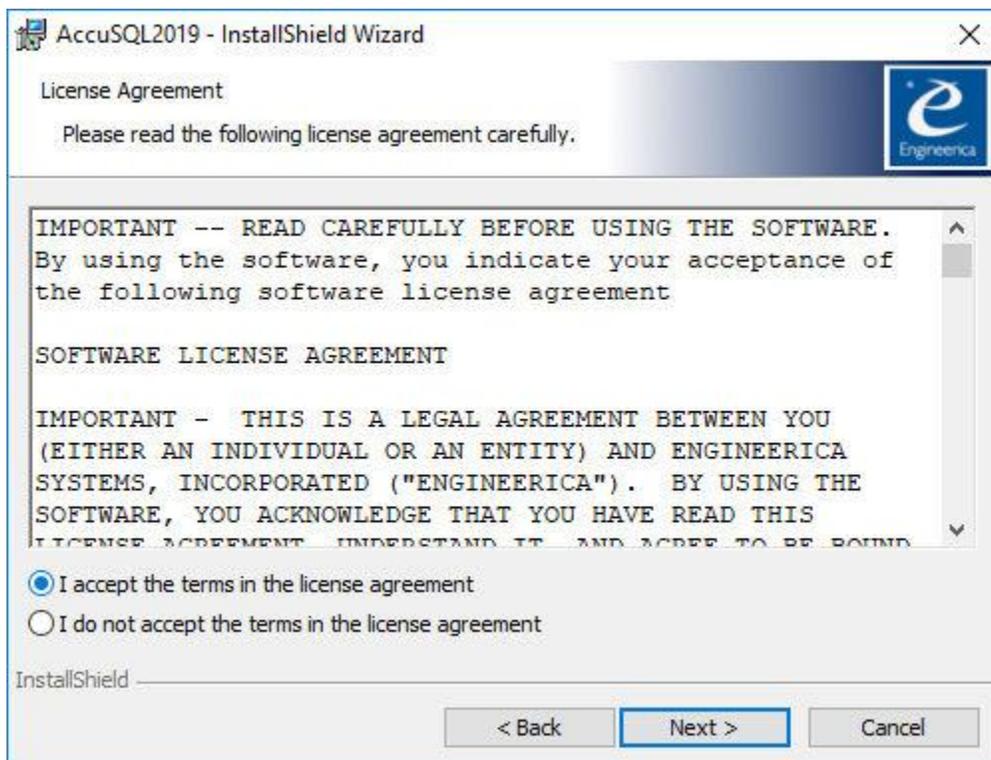
 **Note:** If you need to install the software at more than one lab or center, make sure that you have a license that allows that. If you are not sure what type of license you have, contact the AccuSQL/AccuTrack support team.

Here is a walk-through of the installation wizard for AccuSQL 2019. AccuTrack would have very similar screens and the same functionality.

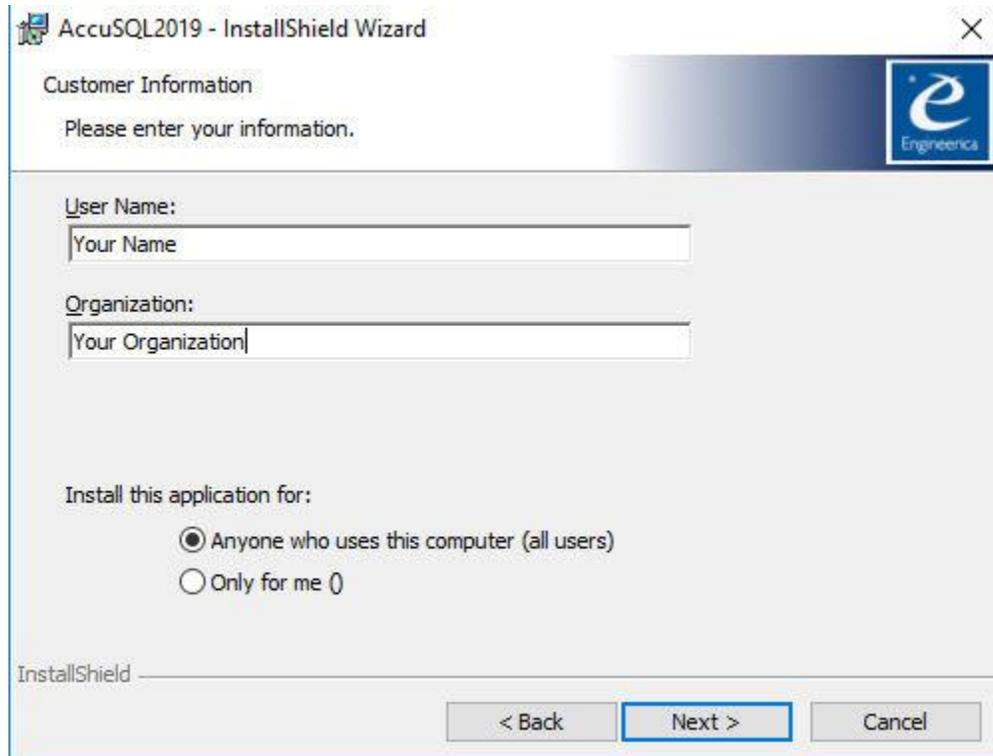




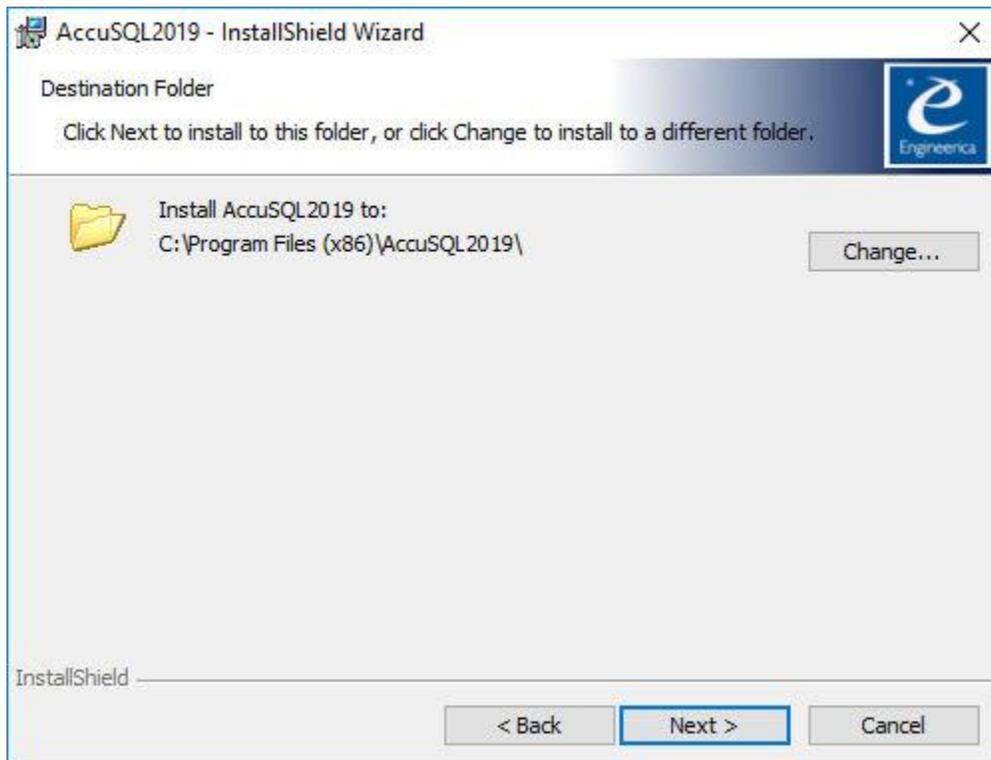
You will see the software’s license agreement. Read it, and if you agree to it, click “Accept”



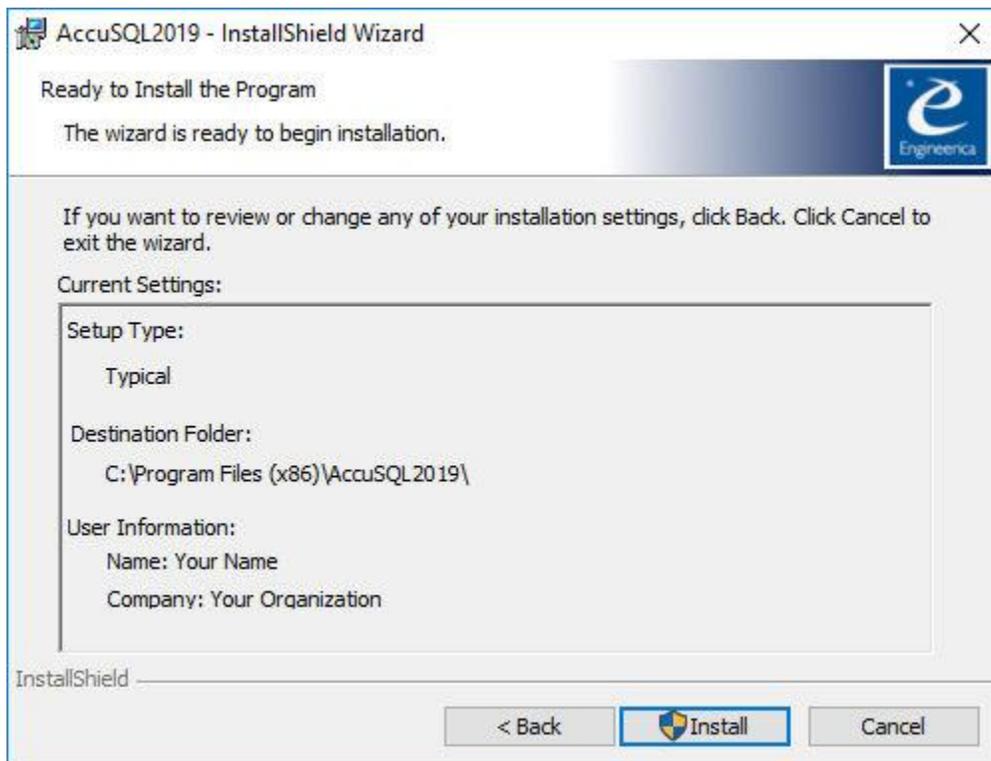
Click “Next”. You will see a screen for entering your name and company name. It is also recommended that you install the program for “Anyone who uses this computer (all users).” Do so and then click “Next”.



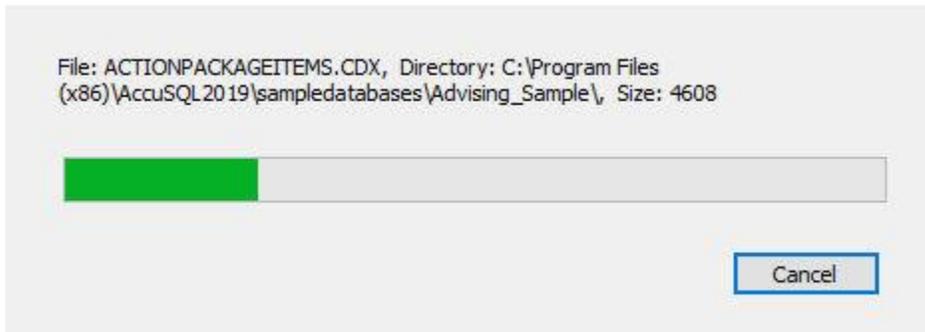
You will see the Destination folder install location. The default location is fine, but you can change it if you so desire, although keeping the default folder is recommended.



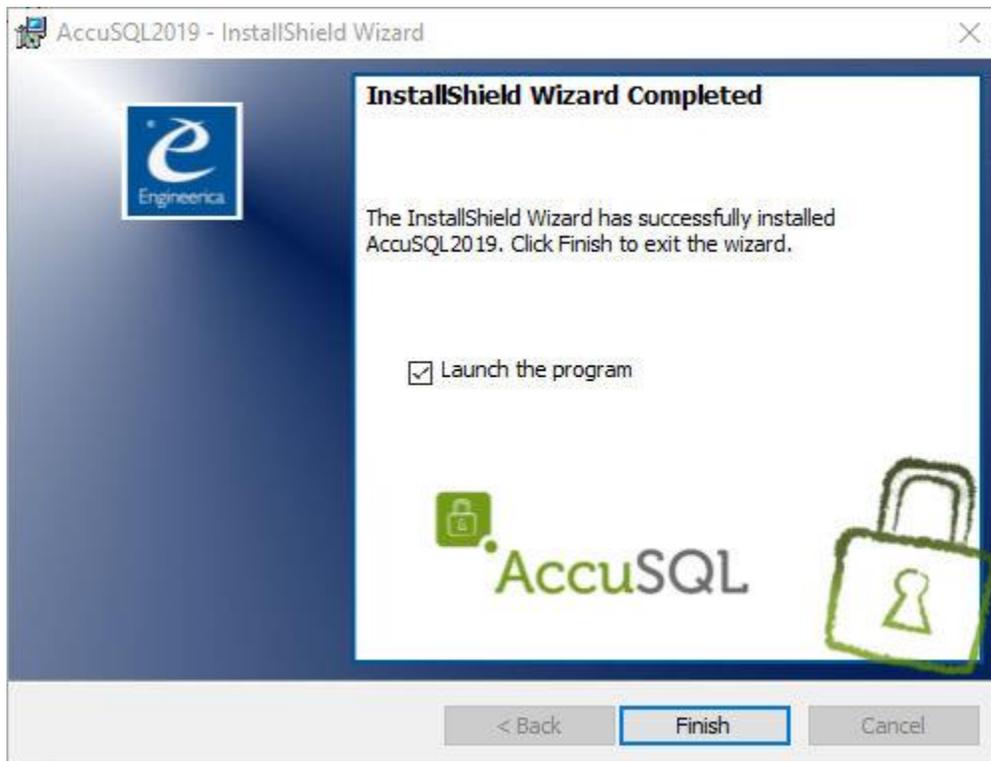
Review all information and then click the "Install" button.



The installation will begin and you will see an installation progress bar:

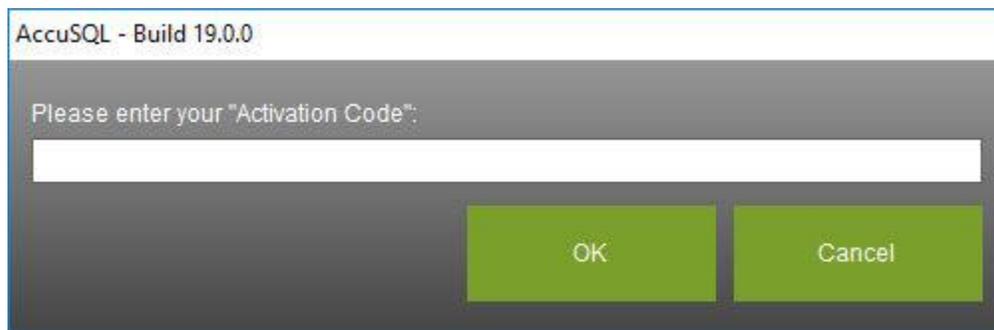
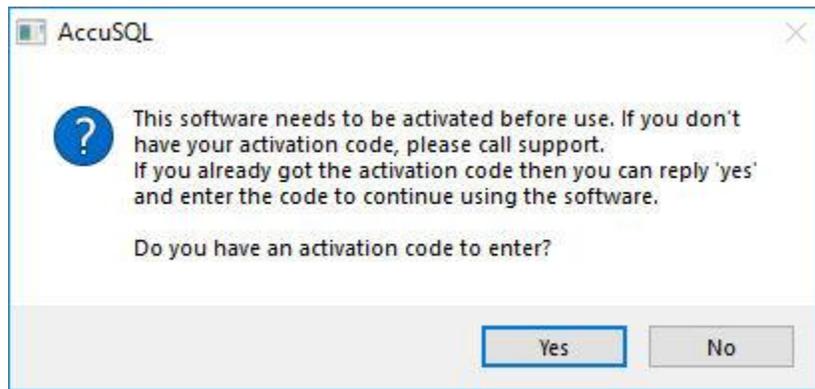


When installation is finished, you will see this screen:



Click "Finish". The installation is completed. If you leave the Launch the program checkbox selected, then AccuSQL or AccuTrack copy some files it needs to run and then will open to a Tutoring Sample database running from its own drive. If you want to explore the software using this sample database, type 11111111 in the User ID field and press Enter and then type NEW in the password field and press Enter. That will log you in to the main System Administration screen.

After you open AccuSQL 2019 or AccuTrack 2019, it will ask you if you have an activation code. Click Yes and then paste in the code provided to by us when the software was delivered to you. If you do not know the code, you can ask your AccuSQL or AccuTrack administrator for it or contact us at support@accutrack.org to request that code.



This activation code need only be entered once for each client installation.

Note: You need a live connection to the internet to register you activation code. If you are installing AccuSQL or AccuTrack on a PC that does not have an internet connection, please contact us at support@accutrack.org to activate your software.

LAUNCHING ACCUSQL/ACCUTRACK

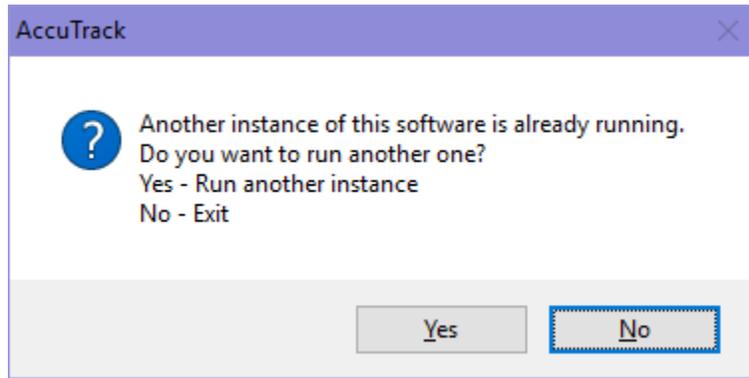
Setup will create a program group for AccuSQL/AccuTrack and will make it available on the Start menu. Use this group to launch AccuSQL/AccuTrack.



You can also launch AccuSQL/AccuTrack by using the shortcut on your desktop:



Note: If AccuSQL/AccuTrack is already running on the computer and you try to launch another instance of it, you will see a message asking you to confirm running an additional instance. If you confirm AccuSQL/AccuTrack will launch the additional instance.



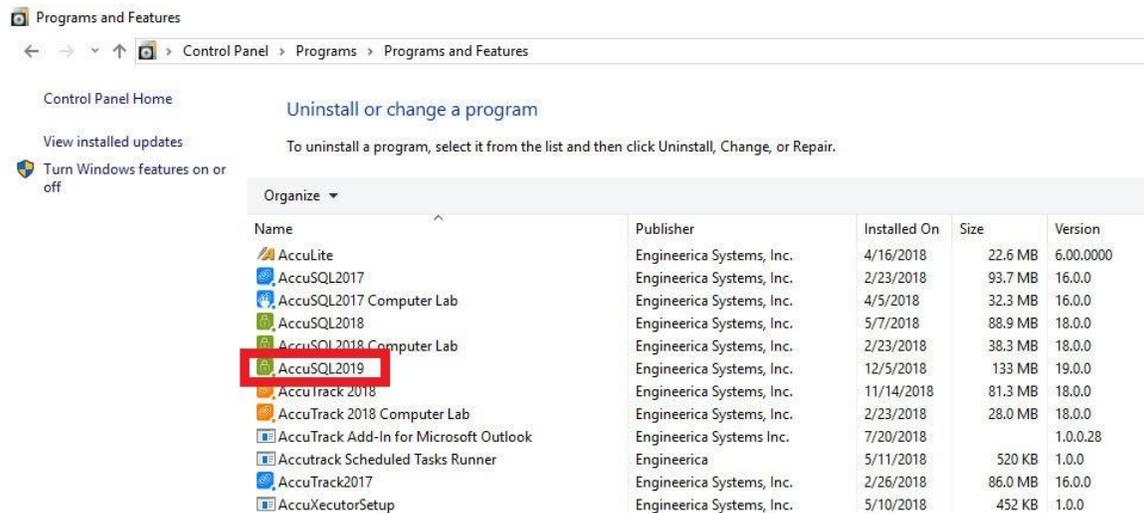
SHARED DATA INSTALLATION

While you can open AccuSQL 2019 and run it in “native mode”, you will want an SQL Server Administrator to transfer a database to MSSQL Server for you as soon as he or she can so you can use the product in SQL Server mode. The SQL Server Administrator would need “sa” access to be able to do the transfer and he/she uses AccuSQL itself to perform the work. This only applies to the AccuSQL version of the software.

Tip: If you cannot get an SQL Administrator to transfer your database right away, you can still begin setting up AccuSQL/AccuTrack in native mode. Any of the settings that you have created or records you have either entered or imported would be transferred to SQL Server, so you would not lose any work that you have already completed.

UNINSTALLING ACCUSQL/ACCUTRACK

To remove AccuSQL/AccuTrack from a client machine, run the Windows Programs and Features and then select AccuSQL 2019 or AccuTrack 2019 from the list and click “Uninstall”.



SWITCHING TO A BLANK DATABASE

When you first open AccuSQL/AccuTrack after you install it, you may notice that it copies some files into your "C:\Users\Public\Public Documents" document area. It is copying the Tutoring_Sample database, the Advising_Sample database, and some other support files it needs to run into that area in a folder called ACCUTRACK. After it is done, AccuSQL or AccuTrack will open in "native" (non SQL server database mode) and automatically be pointing to the tutoring sample database. AccuTrack does not have a "native" and SQL Server mode and can thought of as running "native" only. The tutoring_sample database is a great place to practice using AccuSQL/AccuTrack, but you will at some point want to point AccuSQL/AccuTrack to a blank database so you can begin building your own center.

To do so for the AccuSQL version:

You will need your SQL Server system administrator to login to AccuSQL and then select Database >> Create Blank DB in SQL.

If you already have a database you have been using for an older version of AccuSQL, you can continue using that database however, you will need to run the SQLDataUpdater.exe located in the folder where AccuSQL 2019 is installed with sa permissions in order to add the new tables, columns, triggers, etc. that the 2017 version of AccuSQL needs to run properly.

For detailed information on the above for AccuSQL, please see:

For AccuTrack Only: You will need to copy the AccuData and the DataDic folder from the installation folder of AccuTrack 2019 (default is C:\Program Files(x86)\Accu2019) out to the server where you want to put the database. You can then set the AccuTrack 2019 computers to that shared data path. You should create a folder above the folder where you will be putting to AccuData and DataDic folders. You also can use either a unc path or drive mapping to connect to the database.

Important: You must give read/write/modify access to the user accounts that will be signing into AccuTrack and using the shared database.

Here are some examples using a unc path and a mapped drive to connect to the shared database.

- 1) **Using a unc path:** Let's say you have a server on the network called MYSERVER. On the MYSERVER computer, you create a folder called AccuFiles. Under the AccuFiles folder, you copy the AccuData (a blank database) and the DataDic folder from the folder where you installed AccuTrack on your client computer (default is C:\Program Files(x86)\Accu2019). You would login to AccuTrack on your client computer and then go to Database >> Database Location and enter \\MYSERVER\AccuFiles\AccuData for the Data Path. Click Save and then completely exit and reopen AccuTrack for the changes to take effect.
- 2) **Using a mapped drive:** You create a mapped drive (let's say Z:\) that resolves to the MYSERVER\AccuFiles folder. You would login to AccuTrack on your client computer and then go to Database >> Database Location and enter Z:\AccuData for the Data Path. Click Save and then completely exit and reopen AccuTrack for the changes to take effect. **Note:** Since drive mapping

can change, it is recommended that you use a unc path to connect to the database folder on your network.

For detailed information on the above for AccuSQL, please see:

USING DATA FILES FROM AN OLDER VERSION OF ACCUSQL/ACCUTRACK

AccuSQL 2019 includes a built-in data upgrade tool for users of previous versions of AccuSQL. This data upgrade tool will automatically convert your older AccuSQL data 12, 14, or 15) into version 16 (2017) format. This preserves your current data and even configuration. To upgrade an existing AccuSQL database, we provide a utility in your AccuSQL installation folder called SQLDataUpdater.exe. This utility allows you to pick the SQL Server database you want to upgrade, then will add alter the table structures as needed to upgrade the database for use with the current version. This utility must be run against the database with “sa” permissions so you would need to have your SQL Server Administrator perform the upgrade.

For AccuTrack, the upgrade process is run based on the data version of the database versus the Data dictionary (DataDic). In the database folder (typically AccuData), you can open the file dataversion.inf in Notepad to determine the data version. You can do the same in the DataDic folder to determine its version. Please review the video below for details about the upgrade process.

 **Important:** You must upgrade your older AccuSQL or AccuTrack database prior to using it, or AccuSQL/AccuTrack 2019 will give you errors when it opens. The errors are related to the program looking for tables and fields in the database that do not yet exist. If you see errors when you open AccuSQL/AccuTrack, the chances are very good that the data has not been upgraded yet.

- [View a video](#) on how to install AccuTrack and also upgrade an older AccuTrack database to version 2019. Note: If this is a new installation, then you would merely copy the AccuData (blank database folder) and DataDic folder from the folder where AccuTrack 2019 is installed and then put them out on the server under a folder called AccuFiles (or whatever you want). All AccuTrack stations that are going to be pointing to that database must have read/write/modify access to the top lever folder (AccuFiles) and all folders and files under it. Learn about all of these topics in the AccuTrack 2019 Database Operations video at: <https://www.youtube.com/watch?v=JIBLF1b6glw>
- [View a video](#) on how to install AccuSQL 2019. If you want to know how to update an older AccuSQL database to version 2019, please review the [AccuSQL database operations](#) video.

USING AN ID-READER

The ID-reader speeds up the sign-in and sign-out process by automating the ID number entry into AccuSQL/AccuTrack. Instead of typing the ID numbers manually, students only need to “swipe” their ID card into the reader.



If the read is good, a green LED will light up and you will hear a short beep. If the student is signing in, his or her ID # will momentarily appear in the main sign-in screen and then the Activities or New User screen will appear. If the student is signing out, a sign-out confirmation message will appear.

 **Note:** Students can still use the keyboard for ID entry if they forget their ID card.

The reader is installed into a PC system by simply plugging it into an available USB port. It will install the drivers it needs automatically.

The reader by default will read whatever you have encoded on your card. If you need to read a specific track and/or parts of a track, the reader itself needs to be configured. If you have purchased the reader from us, we will assist you in configuring your readers. Please contact us at support@accutrack.org to schedule a meeting with us.

The reader mounts easily on any flat surface and no external power source is required.

 **Note:** There are two types of ID readers: magnetic stripe and barcode. Order the one that matches your ID card.

CONFIGURING ACCUSQL/ACCUTRACK FOR YOUR CENTER

AccuSQL/AccuTrack is flexible software and offers many configuration and setup options. To prepare the software for use at your center, you will need to set it up first. This section explains how.

 **Tip:** It might be easier if you use the software functions gradually. For example, start by using the software for tracking student attendance. When you get comfortable with that, add tutors and assign them activities and schedules, set up appointment scheduling, setup surveys, setup workshops, setup media checkouts, and so on. Since AccuSQL and AccuTrack are so flexible, you can configure the software to collect exactly what you want based on how you do business at your center.

SETTING UP THE STUDENT ATTENDANCE TRACKING MODULE

1. Setup the **semester's** date

2. Enter the **student's categories** and **activities**
3. Set up the sign-in screen **options**.
4. If you want to track which tutor the student meets with during the visit, enter the **tutors**, their **schedule**, and turn on the Tutor Selection **option**.
5. If you want to show instructors in the Activities screen, enter the **instructors** and turn on that **option**.
6. If you want to track demographics data, set up the **profile questions**.

SETTING UP FEEDBACK ON SERVICES

1. Set up the student's survey / feedback **question**.
2. Set up the survey frequency and **options**.

SETTING UP TUTOR RATINGS

1. Set up the staff-rating **questions**.
2. Set up the survey frequency and **options**.

SETTING UP WORK-HOURS TRACKING / PAY CALCULATIONS:

1. Enter **tutors**.
2. If you are planning on tracking tutor activities, enter the **tutor's tasks**.
3. Turn the tutor activities screen on or off and check the maximum tutor sign-in period.
4. If you want to calculate pay with AccuSQL/AccuTrack, enter the tutor's pay scales and rounding rules.

SETTING UP APPOINTMENTS MANAGEMENT

1. Enter **tutors**.
2. Enter tutor **schedules**.
3. If you want to send appointment confirmation or reminders by email, configure the **email parameters**.
4. Set up the appointments options.
5. If you want AccuSQL/AccuTrack to send appointment reminder, set up the appointment reminder utility.

SETTING UP THE MEDIA CHECKOUTS MODULE

1. Enter your **media stock**.
2. Set up the **checkout** options.

SETTING UP OTHER MODULES:

- Program Assessment module – enter the student’s grades.
- Student Athletes tracking – enter the sports, team members, and required hours.
- Seminar registration tracking – enter seminars.

Also don’t forget to change the default administrator **ID and password** and be careful, it can be easy to lock yourself out!

MAINTAINING ACCUSQL/ACCUTRACK

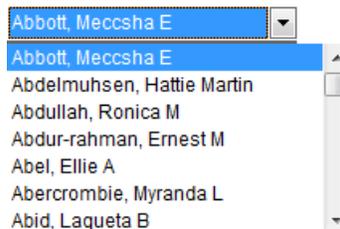
AccuSQL/AccuTrack requires little maintenance. If you will be running in SQL Server mode, almost all of the maintenance is performed in MSSQL Server. Your dba will automate backups and also perform various maintenance tasks for you using SQL Server Management Studio (SSMS).

If you are running AccuTrack, you can use the Database >> Clean feature to commit any deletions and to re-index the database. If you ever get a message that something becomes corrupted in your AccuTrack database, use Database >> Repair. **Important:** You must have exclusive access to the AccuTrack database to perform either of these operations.

USING CONTROLS

AccuSQL/AccuTrack uses two types of controls: standard Windows controls and special controls. The following explains the controls you will encounter while using AccuSQL or AccuTrack.

LIST BOXES

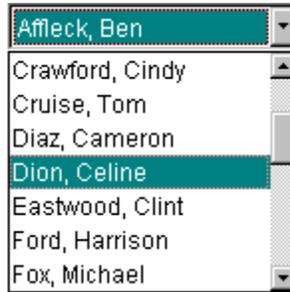


List boxes are used to display items in a scrollable window. The items appear in alphabetical order. If there are more items than the list box can show, use the up  and down  buttons in the vertical scroll bar to see all the choices. For a faster movement, drag the scroll button in the scroll bar up and down. To select an item from the list, click on it. The selected item will appear highlighted.

Drop-down list boxes



Drop-down list boxes provide you with scrollable lists that contain a number of options. In a drop-down list box, only one item is visible, but you can click the down button  to display a scrolling list of all the items in the drop-down list box.



You can select an item in the list by clicking on it. The selected item will be visible when the scroll list disappears. 

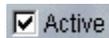
 **Tip:** To speed up the selection process in a drop-down list box, just type the first character of the item you're seeking. The list box will search for the first item that starts with the typed character and will display it in the selection window. To see the next item that starts with this character, press the character's key again.

OPTION BUTTONS



Option buttons allow you to select one of a number of choices. This eliminates the possibility of entering invalid data through typos or other mistakes. To select the appropriate option, simply click on it with the mouse. The selected option will have a dot in its circle.

CHECK BOXES



Check boxes allow you to enable or disable an item by specifying its Boolean state: True (T) or False (F). To select the feature, click on its check box so an "✓" appears in it . To cancel the feature, click on the check box so that it appears empty . You can also press the <Space> key on your keyboard to toggle the '✓' on and off.

TEXT BOXES



Use the text box control to add or edit text. Just click on the text box with the mouse and type your entry.

Tip: You can use the Windows copy, cut, and paste feature with text boxes. To copy text from the text box, highlight it and then hit Ctrl-C on your keyboard. To cut text, highlight it and hit Ctrl-X. To paste text in the box, hit Ctrl-V.

SPINNERS



A spinner is a special text box for entering numbers. You can make choices by typing the values in the spinner box or by “spinning” through values by using the arrow keys. Note that the spinner box has minimum, maximum, and jump values.

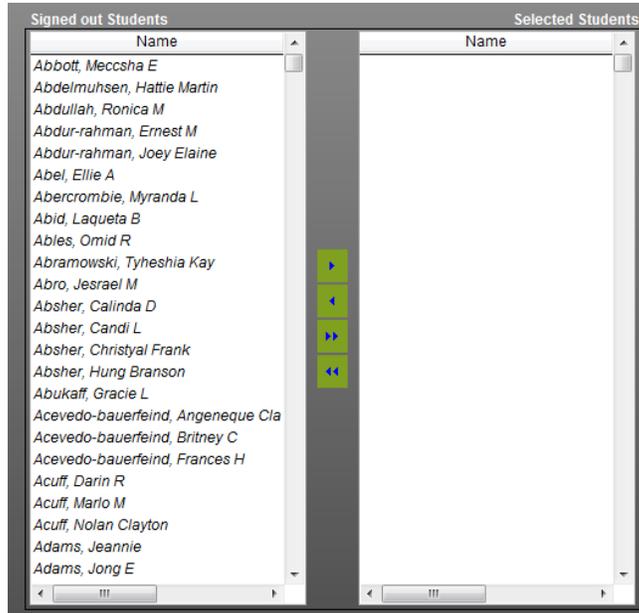
PAGE FRAMES

Staff Name	Service	Student	Date	Start	End
Basoz, Cetin	ICP305 - Intro C++ Programming [Course Tut	Blodgett, Chadd	09/11/2018	08:00 AM	08:30 AM
Basoz, Cetin	JP4400 - Java Programming [Course Tutoring	Conner, Jenelle	10/08/2018	03:30 PM	04:00 PM
Basoz, Cetin	ENG405 - Software Engineering [Course Tuto	Graff-Rapoza, Steffanie	11/12/2018	11:30 AM	12:00 PM
Guzman, Julian	ENG405 - Software Engineering [Course Tuto	Graff-Rapoza, Steffanie	11/27/2018	08:00 AM	09:00 AM
Guzman, Julian	New Student [Advising]	Graff-Rapoza, Steffanie	11/26/2018	11:20 AM	12:20 PM
Guzman, Julian	JP4400 - Java Programming [Course Tutoring	Rodriguez, Santiago	11/27/2018	08:00 AM	09:00 AM

A page frame is a container for pages. Pages in turn contain controls. The page frame is used when the controls we want to display don't fit on one page. To "thumb through" the pages, simply click on the page tab at the top of the page frame.

SPECIAL ACCUSQL/ACCUTRACK CONTROLS

SELECTION LIST BOXES



The *Selection List Boxes* are actually two list boxes grouped together to allow you to easily select one or more available items. The list box on the left displays the available items, while the list box on the right displays the selected items. You can move items between the two lists in one of two ways:

- 1) Double click: Double clicking on an item with the mouse will move it from one list to the other.
- 2) Arrow Keys: You can highlight one or more items in one list box then click on the arrow button pointing to the other list box and the items will be moved. If you click on the button with the double arrow  all the items will move to the other list box.

 **Tip:** The Selection List boxes have built in search and sort capabilities. To sort by a column, click on the header of that column. To search, click on any item in the column and start typing the item you are seeking.

QUICK LOCATE BOX

To help you find a particular record faster, AccuSQL/AccuTrack includes a Quick Locate tool that you can access by clicking on the binocular icon . The Quick Locate box will pop up:

Student	Id	Category	Activity	Tutor	Sign-In Time	Sign-Out Time	Period (hrs)
Conner, Jenelle	7777777				11/19/2018 08:14 AM	11/20/2018 08:54 AM	24.67
Torres, Julia	6666666	Computer Us	Academic Us		09/11/2018 11:55 AM	09/11/2018 01:49 PM	1.90
Conner, Jenelle	7777777	Computer Us	Academic Us		11/16/2018 02:39 PM	11/16/2018 03:40 PM	1.01

Category	Activity ID	Activity
Advising		Adv Appt
Advising		Career Placement
Advising		Degree Audit
Advising		Grad Check
Advising		Graduation Meeting
Advising		New Student
Computer Use		Academic Use
Computer Use		Non-Academic Use
Course Tutoring	ACP400	Advanced C++ Programming
Course Tutoring	ALG301	Algebra 1
Course Tutoring	ALG302	Algebra 2
Course Tutoring	CAL401	Calculus
Course Tutoring	ENG405	Software Engineering
Course Tutoring	ICP305	Intro C++ Programming
Course Tutoring	JP4400	Java Programming
Math Tutoring	ALG301	Algebra 1
Math Tutoring	ALG302	Algebra 2
Math Tutoring	CAL401	Calculus
Math Tutoring	PCA401	Pre-Calculus
Success Center	ACP400	Advanced C++ Programming

Initially, the large list box shows all the available records. However, if click on the grid itself on one of the columns you want to search in, you can type one or more letters of the record you're looking for in the grid, the list will only show matching records.

SUPERTABLE

A *SuperTable* is a powerful control for presenting information. Not only can you view and select records from this table, but you can also sort, search, filter, print, and export the data as well!

ACTIVE ROW HIGHLIGHT

The active row in a *SuperTable* is automatically highlighted to make it easier for you to identify it.

Student Name	Student Id	Active	Card Id
Abbott, Meccsha E	487592683	Yes	1236655
Abdelmuhsen, Hattie Martin	924335362	Yes	
Abdullah, Ronica M	013207962	Yes	
Abdur-rahman, Ernest M	473279562	Yes	
Abdur-rahman, Joey Elaine	340844191	Yes	
Abel, Ellie A	696887398	Yes	
Abercrombie, Myranda L	246577141	Yes	
Abid, Laqueta B	078864002	Yes	
Ables, Omid R	911923779	Yes	
Abramowski, Tyheshia Kay	247657342	Yes	
Abro, Jesrael M	366591663	Yes	
Absher, Calinda D	346546164	Yes	
Absher, Candi L	463993250	Yes	
Absher, Christyal Frank	706746564	Yes	
Absher, Hung Branson	912564557	Yes	
Abukaff, Gracie L	501967439	Yes	
Acevedo-bauerfeind, Angeneq	581723436	Yes	
Acevedo-bauerfeind, Britney C	453635231	Yes	
Acevedo-bauerfeind, Frances I	322529517	Yes	

SORTING

To **sort** by a certain column, simply click on its header with the mouse. An up arrow appears in the header of the table to indicate the sorting order. An up arrow indicates A to Z (ascending) order. You can reverse the sort order by simply clicking on the header again, to make it descending. A down arrow appears in the header of the table.

Student Name	Student Id	Active	Card Id
Zylstra, Levita Elizabeth	828387923	Yes	
Zurita, Stuart P	934082959	Yes	
Zurita, Nayra M	383165056	Yes	
Zurek, Anhtuyet L	834234435	Yes	
Zuniga, Yishian	820828455	Yes	
Zuniga, Annabell L	951171916	Yes	
Zulfiqar, Khadija	708440670	Yes	
Zulfelder, Rubie	780132285	Yes	
Zulfelder, Brad Joe	086776735	Yes	
Zugner, Jomarc L	818549119	Yes	
Zucker, Jessa G.	860101891	Yes	
Zubia, Mobutu	085986877	Yes	
Zuber, Aukeisha C	227980619	Yes	
Zouak, Deshea Sue	652022830	Yes	
Zlaket, Gazal S	651127552	Yes	
Ziyaae, Kimberlyn D	599541809	Yes	
Ziyad, Adrienne J	559050999	Yes	
Zinck, Shannen G	379165693	Yes	
Zinck, Neysa Allen	804034005	Yes	

SEARCHING

The *SuperTable* also offers incremental **search** capability. For example, if you would like to quickly go to “Tom Hanks”, first sort the records by first name then click on any of the fields in the First Name column and type “Tom”. You will notice that the First Name label in the column header will change to show the letters you are typing, and you will jump to the first record that matches the entered letters. If there is no match, you will stay on the same record.

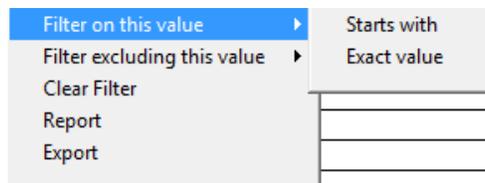
 **Tip:** To start another search, use the backspace key to delete the previous search, or switch away from the control

 **Tip:** To search date fields, enter the date in this format: YYYYMMDD.

COWL	Student Id	Active Card Id
Cote, Joy Lisa	640478485	Yes
Cote, Lorina Cano	379825932	Yes
Cotten, Brahim J	632124040	Yes
Cotten, Magen Rene	784873665	Yes
Cotter, Krystle E	974958444	Yes
Coulter, Jenisue M	653131796	Yes
Coulter, Kerwyn Ann	598301478	Yes
Cousins, Kristal Louise	931669821	Yes
Couvillon, John Garcia	024208675	Yes
Cowley, Katy G.	180648107	Yes
Cowley, Omelia S	932209270	Yes
Cowley, Sokha Michelle	328830752	Yes
Cox, Francoise Wayne	203899287	Yes
Cox, Levita	290556881	Yes
Coy, Taryn L	877468489	Yes
Cradock, Cindi N	482159406	Yes
Craft, Cornelio R	172909163	Yes
Crambell, Meng	247229589	Yes
Crane, Vanessa Christina	837639797	Yes

FILTERING

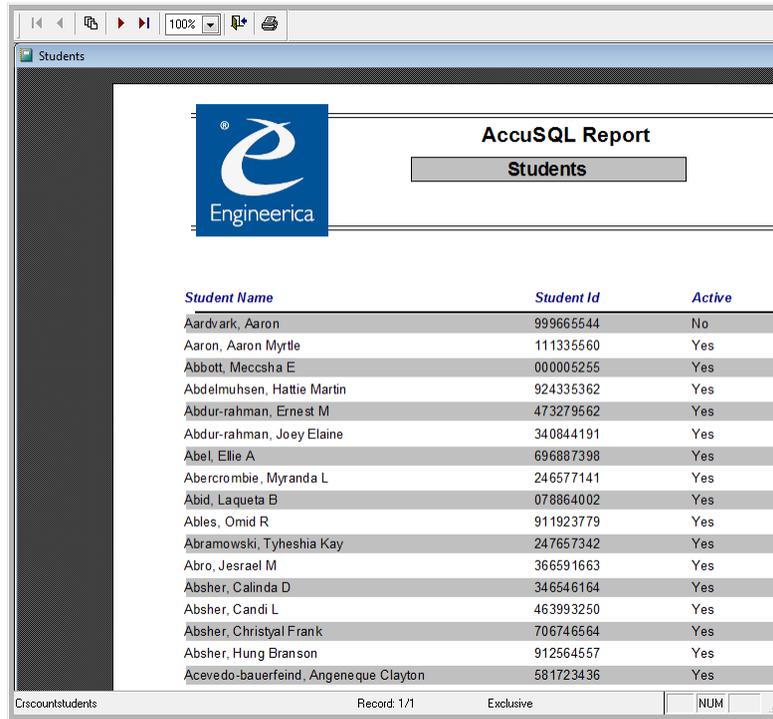
To filter the records appearing in a SuperTable, click on a cell using the RIGHT mouse button, you will see a pop-up menu:



You can now set the filter on the value in the cell, exclude the records with the value in the cell, or clear the filter.

PRINTING

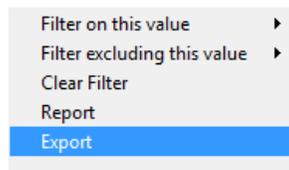
To print the records appearing in a SuperTable, hit the F5 key on your keyboard or select Report from the right click menu options.



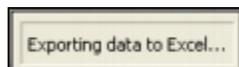
You will see a report with the data of this table. You can now use the Report's Control button to print out this report.

EXPORTING THE TABLE DATA

To export the data displayed in a *SuperTable*, hit the F6 key on your keyboard or select Export from the right click menu options. You can also right click in the grid and then select Export.



Using either method, you will see this box on the screen once the export begins:



And in a few seconds Microsoft Excel will open with the data:

1	Student Name	Student Id	Active	Card Id
2	Aardvark, Aaron	999665544	No	
3	Aaron, Aaron Myrtle	111335560	Yes	
4	Abbott, Meccsha E	000005255	Yes	
5	Abdelmuhsen, Hattie Martin	924335362	Yes	
6	Abdur-rahman, Ernest M	473279562	Yes	
7	Abdur-rahman, Joey Elaine	340844191	Yes	
8	Abel, Ellie A	696887398	Yes	
9	Abercrombie, Myranda L	246577141	Yes	
10	Abid, Laqueta B	078864002	Yes	
11	Ables, Omid R	911923779	Yes	
12	Abramowski, Tyheshia Kay	247657342	Yes	
13	Abro, Jesrael M	366591663	Yes	
14	Absher, Calinda D	346546164	Yes	
15	Absher, Candi L	463993250	Yes	
16	Absher, Christyal Frank	706746564	Yes	
17	Absher, Hung Branson	912564557	Yes	
18	Acevedo-bauerfeind, Angeneque Clayton	581723436	Yes	
19	Acevedo-bauerfeind, Britney C	453635231	Yes	
20	Acevedo-bauerfeind, Frances H	322529517	Yes	
21	Acuff, Darin R	933603018	Yes	
22	Acuff, Marlo M	990737792	Yes	

You can now save this sheet and use Excel functions on the data.

ROW RESIZING

Sometimes you will need to adjust the width of a column in a *SuperTable* for best viewing. To adjust the width, move the mouse pointer in the column header area. The cursor will change to a down arrow ↓. Move the cursor vertically above the column line until it changes to vertical resize cursor ⇅. Now click on the mouse button and drag the column left or right to resize it (move the mouse while keeping the mouse button down)

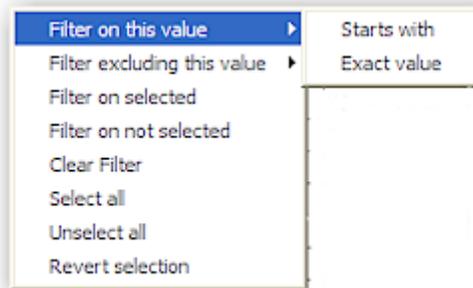
For even faster resizing, double click on the line separating the columns in the header row. The *SuperTable* will automatically resize the column to fit its widest record.

MULTIPLE SELECTION TABLE

ACCUSQL/ACCUTRACK 2019 REFERENCE MANUAL

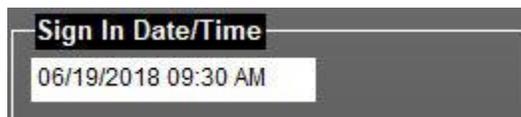
Student	ID	Appt Date	From	To	Activity	Tutor
<input type="checkbox"/> Blodgett, Chadd	9999999	09/11/2018	08:00 AM	08:30 AM	ICP305 - Intro C++ Programming [Course Tutor	Basoz
<input checked="" type="checkbox"/> Graff-Rapoza, Steffanie	3333333	09/11/2018	08:00 AM	08:30 AM	ICP305 - Intro C++ Programming [Course Tutor	Basoz
<input checked="" type="checkbox"/> Graff-Rapoza, Steffanie	3333333	11/27/2018	08:00 AM	09:00 AM	ENG405 - Software Engineering [Course Tutor	Guzm
<input type="checkbox"/> Rodriguez, Santi	4444444	11/27/2018	08:00 AM	09:00 AM	JP4400 - Java Programming [Course Tutoring]	Guzm
<input type="checkbox"/> Thongpaen, Tawan	8888888	09/13/2018	09:30 AM	10:00 AM	CAL401 - Calculus [Math Tutoring]	Guzm
<input checked="" type="checkbox"/> Graff-Rapoza, Steffanie	3333333	10/30/2018	11:00 AM	11:30 AM	ENG405 - Software Engineering [Course Tutor	Basoz
<input checked="" type="checkbox"/> Graff-Rapoza, Steffanie	3333333	11/26/2018	11:20 AM	12:20 PM	New Student [Advising]	Guzm
<input checked="" type="checkbox"/> Graff-Rapoza, Steffanie	3333333	11/12/2018	11:30 AM	12:00 PM	ENG405 - Software Engineering [Course Tutor	Basoz
<input checked="" type="checkbox"/> Graff-Rapoza, Steffanie	3333333	09/18/2018	01:00 PM	01:30 PM	ALG301 - Algebra 1 [Math Tutoring]	Guzm
<input checked="" type="checkbox"/> Graff-Rapoza, Steffanie	3333333	09/20/2018	01:00 PM	01:30 PM	ALG301 - Algebra 1 [Math Tutoring]	Guzm
<input type="checkbox"/> Thongpaen, Tawan	8888888	09/14/2018	01:00 PM	01:30 PM	CAL401 - Calculus [Math Tutoring]	Guzm
<input checked="" type="checkbox"/> Graff-Rapoza, Steffanie	3333333	09/14/2018	01:30 PM	02:00 PM	ALG301 - Algebra 1 [Math Tutoring]	Guzm
<input checked="" type="checkbox"/> Graff-Rapoza, Steffanie	3333333	09/26/2018	03:00 PM	03:30 PM	ALG301 - Algebra 1 [Math Tutoring]	Guzm
<input checked="" type="checkbox"/> Graff-Rapoza, Steffanie	3333333	10/16/2018	03:00 PM	03:30 PM	ENG405 - Software Engineering [Course Tutor	Guzm
<input type="checkbox"/> Conner, Jenelle	7777777	10/08/2018	03:30 PM	04:00 PM	JP4400 - Java Programming [Course Tutoring]	Basoz
<input checked="" type="checkbox"/> Graff-Rapoza, Steffanie	3333333	10/08/2018	04:00 PM	04:30 PM	ENG405 - Software Engineering [Course Tutor	Basoz

This table is used when it is possible to select several records. Each record has a check box on its left column. To select a record, click on the check box in its row. You can also click on a record with the **right** mouse button and use the pop up menu to filter and then select records.



Tip: When you open a Multiple Selection Grid, if you click on a record it will select its checkbox automatically. To avoid that, simply press the Tab key on your keyboard to tab directly on the column you want to work with and you can then begin typing an entry to drill down to it or use the right click menu options for that column.

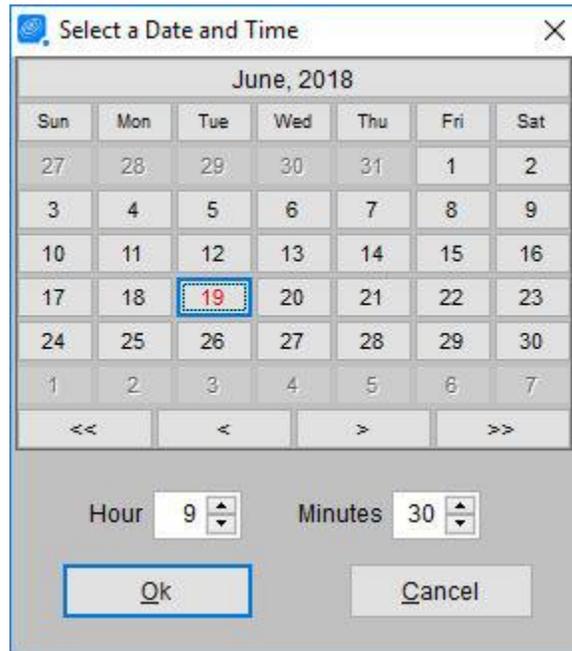
DATE AND TIME ENTRY BOX



Some screens in system administration utilize the *Date and Time Entry box*. This makes it easier to enter and select the date and time by providing you with keyboard shortcuts and a Calendar Control. When using this special text box, you can type in the desired values, or you can use the Calendar.

To manually enter the date and time, click on the text box and type them in. Enter the dates in an **mm/dd/yyyy** format, and enter the time in **hh:mm** format. Type “A” after the time for AM, and “P” for PM.

To invoke the **Calendar Control**, click on the *Date and Time Entry box* with the RIGHT mouse button, or press the <?> key. This will cause the calendar to popup.



The calendar shows the current month. You will notice the date entered in the *Date and Time Entry box* appearing in red, and the time appearing in the hour and minutes text boxes at the bottom of the control.

To change to a different date, simply click on it. The new selection will appear in red. To view a different month, use the single arrow buttons. The right arrow button “>” will increment the month, while the left arrow “<” will decrement it. To view a different year, use the double arrow buttons. The double right arrow button “>>” will increment the year, while the double left arrow button “<<” button decrement it. To change the time, use the spinner up and down arrows, or type in the time manually.

When you finish selecting the date and time, click on the “OK” button, and the Date and Time Entry box will be updated with the selected date and time values.

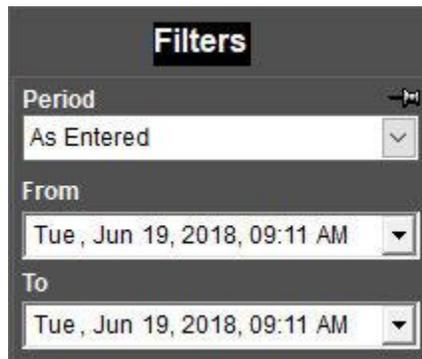
CALENDAR DATE AND TIME ENTRY BOX



This control is also used for selecting date and time and is similar to the one discussed above. Here is how to use it:

- To enter the time, type it in or highlight the hour or minute and use the spinner control.
- To enter the date, type it in or click on the Calendar icon. When the calendar is up, you can change the month by clicking on the current month and selecting a different month from the pop-up list box:
- To change the year, click on the current year and use the pop-up up and down arrow keys to select a different year:
- To change the month, use the two arrow keys on the sides of the calendar:

PERIOD SELECTION BOX



The Period Selection box consists of a drop-down box and two *Date and Time entry boxes*. Use the drop-down box to select a preset period such as last week, and next month. When you make a selection from this drop-down box, the “From” and “To” *Date and Time entry boxes* will automatically update to reflect the selected period.

If you would rather use a specific period instead of one from the drop-down box, simply enter the date and time in the “From” and “To” boxes. You can make the entry via keyboard or via the calendar as explained in the *Date and Time Entry box* section above.

 **Tip:** The dates appearing when “This Semester” is selected are set up via the Setup – Center Setup – Semesters Setup screen.

USING ACCUSQL/ACCUTRACK SCREENS

To make it easier for you to use AccuSQL/AccuTrack, we designed a standard interface for their screens. Once you learn how to use this interface, you can easily use any AccuSQL/AccuTrack screen using this interface.

The standard interface will have a *SuperTable* (see above for info on this powerful control). Under this table you will see controls for data entry – usually text boxes. In most screens you will also see a check box marked “Active”. Under the data entry controls, you will see three buttons marked “Add”, “Edit”, and “Delete”.

 **Tip:** You can use the standard *SuperTable* functions to locate a specific record. These include sorting, searching, and filtering. You can also print the data in the *SuperTable* and export it.

When you have data records to view, the *SuperTable* will display these records. When you select one of these records by clicking on it, its information will appear in the data entry controls under the *SuperTable*. This way you can see the details of each record by simply clicking on it.

To add new records, simply click “Add”. The data entry controls will be enabled and blanked out. Also the “Add” and “Edit” buttons will change to “Save” and “Cancel” (or “Revert”)

You can now use the text entry controls to enter the information. For example, type in the text boxes. When finished, click the “Save” button. The text entry boxes will be disabled again, and you will see the new record appear in the *SuperTable*. The new record will be highlighted in the table.

To edit an existing record, first select it in the *SuperTable* and then click on the “Edit” button. The record’s info will appear in the data entry controls. You can now update the records and click “Save” to keep the changes or “Revert” to undo them.

 **Tip:** You can also edit a record by simply double clicking on it in the *SuperTable*.

To delete a record, simply select it and click “Delete”. AccuSQL/AccuTrack will ask you to confirm this action. If you answer “Yes” the record will be deleted.

Note that in most screens, the data entry controls include a check box labeled “Active”. Active records are those currently used in your system. If you no longer need a record, it is highly recommended that you make it inactive instead of deleting it. This way the record will no longer show in most screens, but it will still be available for historical reporting.

THE INTRO SCREEN

When you launch AccuSQL/AccuTrack, the Intro Screen will appear.



You will notice your college name and license type appearing in the licensing box Splash screen. After a few seconds, the intro screen will disappear and you will see the Main Sign-in Screen. Also, you may see a Tool Tips screen that provides helpful hints about AccuSQL/AccuTrack usage.

MAIN SIGN-IN SCREEN

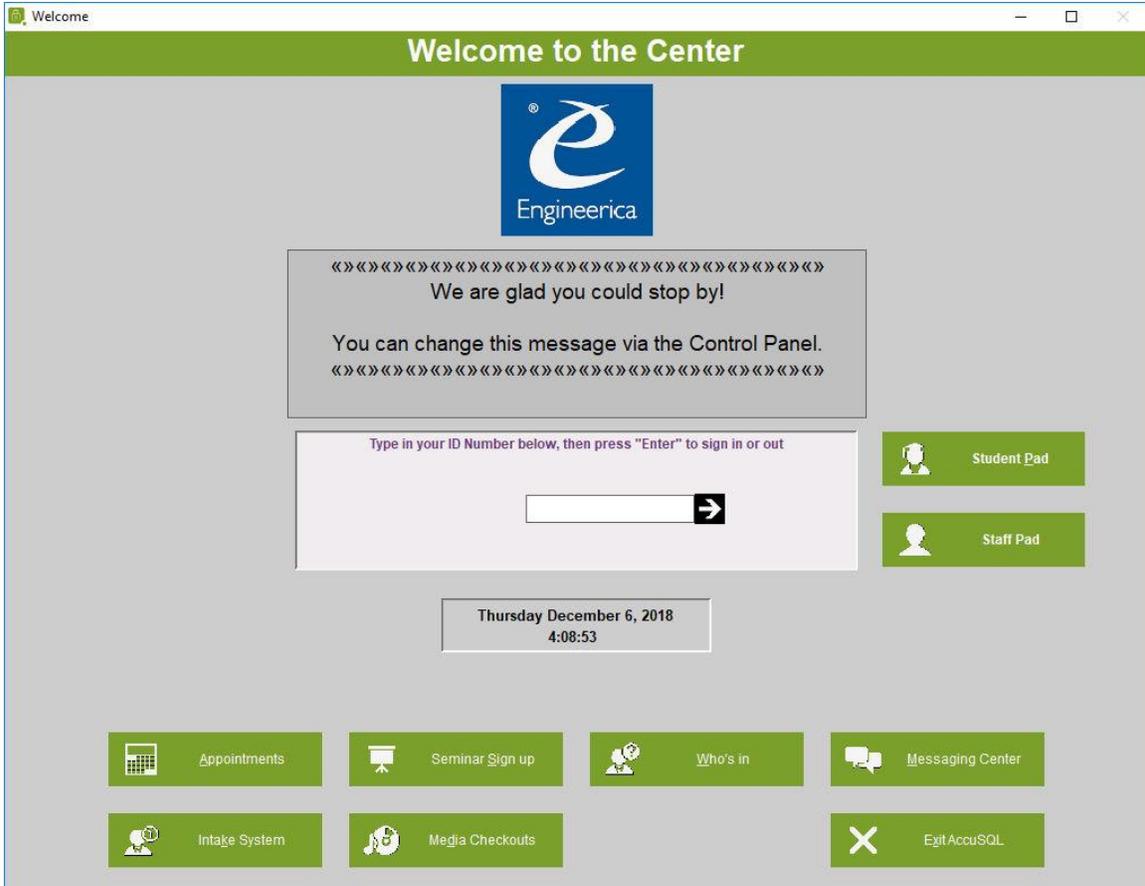
Module: Sign-in

Purpose: Main screen for students, tutors, and administrators to sign-in and sign-out.

Access: This screen is opened at AccuSQL/AccuTrack's launch.

Tip: When you open AccuSQL/AccuTrack, it will be in full screen (kiosk) mode by default. Kiosk mode should be used for any sign-in stations where students will be signing into the system. For administrators, you would typically want to turn off kiosk mode so you can minimize

AccuSQL/AccuTrack when you are not using it. That is accomplished in the Sign-in Setup >> Setup screen by unchecking the Run in Kiosk mode (Applies to this station) checkbox and clicking Save.



The Main **Sign-in** screen has a welcome message at the top. You can change this message in the Sign-in Setup >> Setup screen. Under this message, you will see your college logo. The AccuSQL/AccuTrack staff programmed this logo for you before shipping the software. Under the logo you may see a general announcement box. You can change the text and visibility of this box also in the Sign-in Setup >> Setup screen. Under the general announcements box you will see an ID Entry box. The current date and time appear under the ID Entry box.

Note: AccuSQL/AccuTrack depends on your computer's clock when recording the sign-in and sign-out times. Make sure the clock is accurate and check it periodically. You can do this easily by checking the date and time shown in the sign-in screen.

To sign in, simply enter your ID number in *the ID Entry box* and press the <Enter> key on your keyboard or click on the arrow with the mouse.

Tip: The sign-in ID is set to a 9 digit format by default (XXXXXXXXX), however, you can

change the ID format to whatever you like via the System >> Setup >> ID Settings Options screen - up to 40 characters long. The minimum length is 4 characters. You can also use a secondary card ID, discussed in more detail later.

When you enter an ID in the box, one of the following will happen:

1. If you enter a new ID number that is not in the database, you will see the *New User* screen.
2. If you enter a student ID for a student that is in the database and the student is signed out, you will see the Activities screen. If enabled, you may also see a Join the AccuSQL/AccuTrack Communities pop-up screen (if it is a first-time student sign in). This can be enabled or disabled in the Sign in Setup >> Setup >> Welcome Screen Options menu.
3. If you enter a student ID for a student that is in the database and the student is signed in, you will be signed out and you will see a sign-out confirmation message. Depending on the setup, you might also see a feedback collection form.
4. If you enter a student ID for a student showing up for an appointment, and the software is set up to automatically pick up the activity, you will be signed in and you will see an appointment sign-in confirmation message.
5. If you enter a tutor ID number for a tutor, you will see the tutor control pad.
6. If you enter an administrator ID number, you will see a password box.

SIGNING IN OR OUT CONFIRMATION MESSAGE

The sign-in confirmation message appears when the student successfully signs into the system from the Main screen.

Jenelle Conner signed in at 06/19/2018 09:35 AM

The sign-out confirmation message appears when students sign out. The message shows the student's name, sign-out date and time, sign-in period for current session, and total time spent on the activity and in the center.

```
Jenelle Conner signed out at 06/19/2018 09:38 AM.
In for 00:03 hours.

```

To	This Week		This Semester	
	Visits	Time	Visits	Time
ICP305 - Intro C++ Programming [Course Tutoring]	1	3 min.	1	3 min.
Center	1	3 min.	8	5 hr 2 min.

Have a good day.

 **Note:** the 'semester' statistics are calculated from semester's start date. The weekly

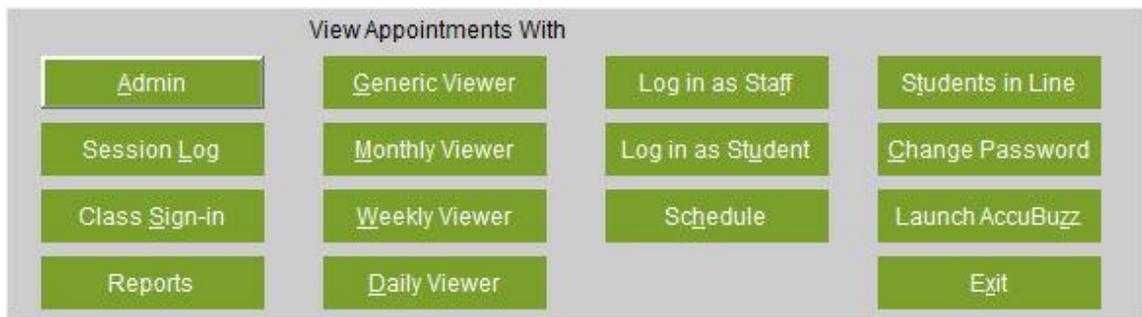
statistics are calculated from the first day of the week as it is set up in the Options screen.

Note: If you turn positive hours on in the Options screen, the statistics in the sign-out confirmation box will be displayed in positive hours.

Tip: The confirmation message box will appear on the screen for a few seconds. You can increase or decrease the default display period via the Option screen. However, the next student does not need to wait for the confirmation box to disappear. Moving the mouse or typing on the keyboard (e.g. typing a sign-in ID number) will make the box disappear. The typed numbers will be preserved and passed to the sign-in box.

TUTOR SIGN-IN

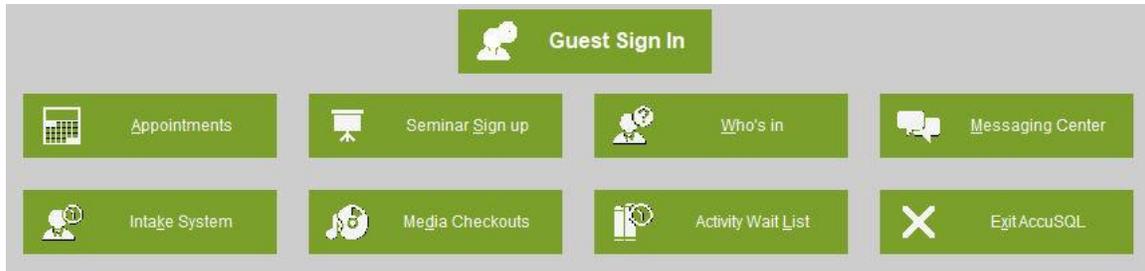
You can use AccuSQL/AccuTrack to track your tutor’s work hours. When tutors sign in, they will see the Tutor Control Pad:



Anyone you have added in the Users >> Tutors screen will be accessing the Tutor Pad at sign in. If the tutor is signing in to work, he/she would click on the “Log in as Staff” button. Depending on how the software is configured, the tutor will be signed in at this screen, or AccuSQL/AccuTrack will display the tutor’s Tasks screen.

If the tutor is signing in as a student (e.g. to get help from another tutor), then he/she would click the “Log in as Student” button. AccuSQL/AccuTrack will proceed with a regular student sign-in procedure. Any of the buttons available on the Tutor Pad can be disabled in the System >> Setup >> Student and Tutor Pad Options screen. The Tutor Pad is discussed in greater detail later in this document.

SIGN-IN SCREEN BUTTONS



The buttons at the bottom of the Main Sign-in screen give students the ability to use certain screens in AccuSQL/AccuTrack. If you like, you can make some or all of these buttons disappear by updating the settings in the Options screen. Here is an explanation of the functionality of these buttons:

Guest Sign in: Clicking this button will allow visitors to sign in who have not been entered yet as students. They would get the normal student sign-in screens. In reports, all sign-ins for guests are listed under the heading “AccuTrack Guest”.

Appointments: Click to enter a student ID, view appointments, and open either the *Quick Scheduler* or *Appointments Wizard*, which is used for scheduling appointments. Enable this button if you want students to be able to schedule appointments from the Main Sign-in screen.

Seminar Sign-up: Clicking this box will bring up the seminar registration screen. Useful if you want students or student groups to be able to sign up for seminars or workshops via AccuSQL/AccuTrack.

Who’s in: Brings up a list of tutors who are signed in. You can also make this screen display students who are signed in by changing an option in Options screen.

Messaging Center: Brings up the Messaging Center to enable students to send email and AccuSQL/AccuTrack messages to other AccuSQL/AccuTrack users.

Intake System: Clicking this button allows students to see where they are in line if you are using the Intake System option. Admins can also sign students in using this option.

Intake System: Clicking this button will bring up the tutor waiting list screen.

Media Checkouts: Use to check media in or out. Useful if system is used by tutors who signs students in and out and check media out.

Activity Waiting List: If you enable the Waiting List function, this button will show students who are currently on the waiting list.

Exit AccuSQL/AccuTrack: If you want students to exit the software from the Main Sign-in screen, enable this button.

NEW STUDENT SCREEN

Module: Student sign-in.

Purpose: To collect information about new student.

Access: This screen appears to student during sign-in if they are not already in the database, or if they are in the database but the administrator clicked the “Update Profile” button in the Options screen. You can decide whether you want to show the New Student screen or not when AccuSQL/AccuTrack does not find a match for the ID entered at sign in. This option is located in Sign in Setup >> Setup >> New Student options.

Important: While students can enter themselves into the system using this option, it is preferable to import the student data if possible to keep the data as “clean” as possible. Please see the “Import” section of this manual. Also, you can disable new students in the Users >> Setup New Student Options screen by unchecking the “Allow new students” checkbox.

New Student

Student ID:
571687161

Please fill in the information below then click on "Continue"

Name					
First: <input style="width: 90%;" type="text" value="Stephanie"/>	Middle: <input style="width: 90%;" type="text" value="Maria"/>	Last: <input style="width: 90%;" type="text" value="Consuelo"/>	E-mail: <input style="width: 90%;" type="text" value="mconsuelo@mycollege.edu"/>		
Contact					
Phone: <input style="width: 90%;" type="text" value="(407) 554-5454"/>	Address: <input style="width: 90%;" type="text" value="226 Anderson St"/>	City: <input style="width: 90%;" type="text" value="Orlando"/>	FL <input style="width: 20px;" type="text"/>	Zip: <input style="width: 90%;" type="text" value="32811"/>	
Cell: <input style="width: 90%;" type="text" value="(407) 554-5455"/>	<input type="checkbox"/> Do not send SMS messages		Grad Date	<input style="width: 90%;" type="text" value="04/09/2015"/>	

<p>Gender? <input style="width: 90%;" type="text" value="Female"/></p> <p>Ethnic Background? <input style="width: 90%;" type="text" value="Hispanic"/></p> <p>Did you graduate from high school? <input style="width: 90%;" type="text" value="Yes"/></p> <p>If you did not graduate, do you have a GED? <input style="width: 90%;" type="text" value="N/A"/></p> <p>Age Group? <input style="width: 90%;" type="text" value="22 Or Under"/></p>	<p>Program? <input style="width: 90%;" type="text" value="ARC"/></p> <p>Classification? <input style="width: 90%;" type="text" value="Junior"/></p> <p>Residency? <input style="width: 90%;" type="text" value="In-state"/></p> <p>Enrollment status? <input style="width: 90%;" type="text" value="Full-time"/></p> <p>Referred by? <input style="width: 90%;" type="text" value="Advisor"/></p>
--	---

● Required

The New Student screen shows your sign-in ID number at the top. This screen will collect some information from the visitors. Note that this screen will only appear to new visitors if you decide to show it.

 **Tip:** The minimum information required in this screen is the visitor's first and last name. The rest of the fields can be set as optional. The administrator can even remove all other fields on this screen.

Starting with the field on the left, type in your first name, use the mouse or <Tab> button on the keyboard to move to the next field and fill in your middle and then your last name.

 **Tip:** You do not need to hold the <Shift> key down while entering the first letter of the name. AccuSQL/AccuTrack will automatically **capitalize** the first letter as you type it. You can also configure the software to automatically fix the capitalization of all the names at once.

After typing the name, enter the rest of the contact information such as the e-mail address, city state, zip, etc. If the software is configured to send email notifications when appointments are set or canceled, the Email address you enter here will be used to send these notifications. If you are going to use text messaging, the Cell field will be the number used to send text messages to the student.

If your center tracks demographics, you will also see the student profile questions. For each question, select the answer that applies to you from the drop-down list box.

 **Tip:** Depending on how the software is configured, the profile questions may or may not be visible. The configuration will also determine whether an answer is required for the question. Required questions are shown with a red dot next to them.

 **Tip:** The phone prefix, email suffix, city and state can be prefilled by entering the information in the Sign in Setup >> Setup >> New Student options screen. You can also show or hide these options for new students in the same setup screen.

After filling in all the information, click on the “**Continue**” button to proceed with the sign in. This will take you to the **Activities** screen.

ACTIVITY SELECTION SCREEN

Module: Student sign-in

Purpose: To allow the student to select the activity he/she will be using.

Access: This screen can appear to student during sign in, or if so desired, you can bypass it completely. In that case, however, you would only be collecting the sign in and sign out times.

AccuSQL

Tutoring Center Services

Stefanie Graff-Rapoza

Please select the service you are going to use today.

Category

- Advising
- Computer Use
- Course Tutoring
- Math Tutoring
- Success Center

Service Type:

- Self Study
- Required Hours
- For Lab Hours
- Not Applicable
- Tutoring
- Testing

Service

- ACP400 - Advanced C++ Programming
- ALG301 - Algebra 1
- ALG302 - Algebra 2
- CAL401 - Calculus
- ENG405 - Software Engineering
- ICP305 - Intro C++ Programming
- JP4400 - Java Programming

Instructor:

- Alvarez, Laura
- Foster, David

Continue
Cancel

If enabled, this screen is displayed to students at every sign-in. The Activity Selection screen allows asking the student for four types of information:

1. **Category:** The menu is grouped into categories for easier identification. First, select the category of the activity by clicking on it in the upper list box. Next select the **activity itself** by clicking on it in the lower left list box.
2. **Service Type:** To select the type of service you want to use, simply select it from the *Service Type* drop-down box.
3. **Instructor:** When you select an activity, its instructor or instructors (typically professors that teach the class) are shown in the Instructor list box. Select the instructor of the activity by clicking on him or her.

After selecting the above options, click the **"Continue"** button to continue with the sign-in. Depending on how you setup the system, you may get a box asking if you want to report the visit to the instructor. Reported visits can be used to automatically send scheduled reports to the instructors. Click either Yes or No to continue.

Note: Items appearing in the Activity Selection screen are entered via screens in the Sign-in

Setup section of the software. This includes the categories & activities, instructors, and service types. The administrator can also change the text labels appearing in this screen, and can make these boxes disappear if not needed.

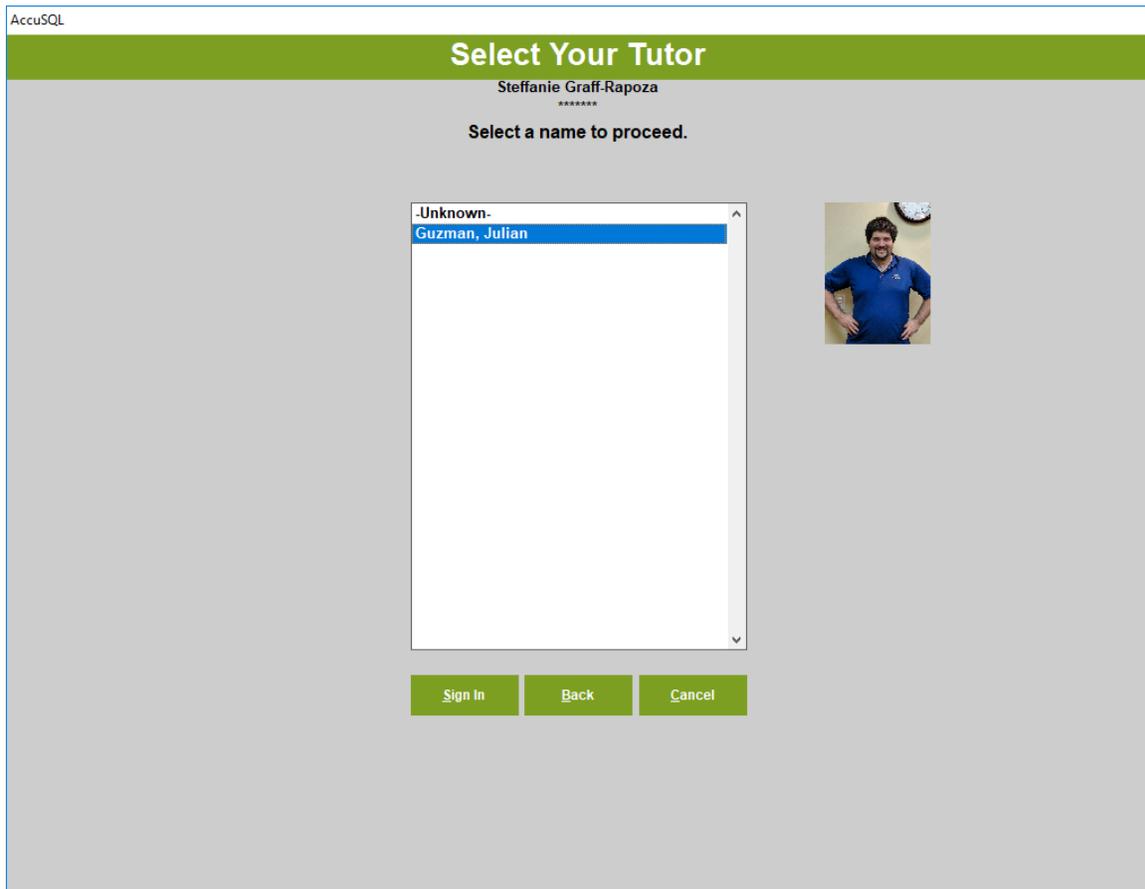
 **Note:** The Activity Selection screen can be turned off completely if not needed. If you do not need to know what students do during their visits, you can disable the display of this screen via an option in the Options screen.

TUTOR SELECTION SCREEN

Module: Student sign-in.

Purpose: To track which tutor the student met with during the visit.

Access: If setup, this screen appears to students after the Activities screen during sign-in.



The large list box in the middle of this screen lists the tutors available for the activity you selected in the

Activity Selection screen. Select the tutor you are seeing by clicking on his or her name, and then click “Sign In” to complete the sign-in. Tutors are the people that work in the center and help students.

 **Tip:** You can also double click on the name to sign in to it.

You will see a confirmation message showing your name, sign in date, and sign in time.

Jenelle Conner signed in at 06/19/2018 09:35 AM

The system is now waiting for the next student to sign in or out.

 **Note:** If the student selects “Unknown” from the list, AccuSQL/AccuTrack will ask the student to indicate which tutor he met at **sign-out** time. The student can also select “None” to indicate that he is not meeting with a tutor (e.g. self-study).

FEEDBACK SCREEN

Module: Student sign-in.

Purpose: To collect feedback from students.

Access: If setup, this screen appears to student during sign-out time.

If configured to do so, AccuSQL/AccuTrack will display a survey screen at student sign-in or out. AccuSQL/AccuTrack can present two types of surveys: Tutor ratings and services. Here is an example of a survey:

Feedback Survey

To help us plan our services for you, we would like some information. Please take some time to fill out the survey.

I received prompt service ▼

The staff was friendly and courteous ▼

The tutor listens and responds well to my questions or concerns ▼

The environment was conducive to learning ▼

The lab is a welcoming and relaxed environment for working on my assignments ▼

The lab's computers have adequately met my academic needs ▼

I am satisfied with the lab's hours of operation ▼

Overall, I am satisfied with the level of service I have experienced in this lab ▼

Please add additional comments if needed?

Done Reset

The student can use the drop-down boxes to answer a survey question. The student can also enter comments in the edit box at the bottom of the survey screen. The administrator sets the questions and the answers scale.

 **Tip:** Questions that require an answer are marked with blue font for easier identification. AccuSQL/AccuTrack will prompt you to answer all required questions before completing the sign

out.

Click on "Done" to complete the sign-out process.

SEMINAR SIGN-UP

Module: Seminar registration.

Purpose: To allow the student to register to seminars and workshops.

Access: This screen appears to student when clicking the "Seminar sign-up" button in the main sign in screen.

Please select the workshop you would like to take:

Title	Start	Presenter	Registered
Robotics Seminar	03/09/2019 12:30 PM	Dr. Light Yagami	<input checked="" type="checkbox"/>
Orlando Training AccuSQL	07/09/2019 11:31 AM	Julian McMahon	<input checked="" type="checkbox"/>
Robotics Seminar 2	07/19/2019 02:30 PM	Dr. Light Yagami	<input type="checkbox"/>
Robotics Seminar 3	11/22/2019 01:30 PM	Dr. Light Yagami	<input type="checkbox"/>

Workshop Title
Robotics Seminar 2

Start: 07/19/2019 02:30 PM **End:** 07/19/2019 03:30 PM **Registration Deadline:** 07/19/2019 02:45 PM Closed

Seats available: 5 **Location:** City of Tomorrow Stadium **Presenter:** Dr. Light Yagami

Description
A truly magnificent experience with world- renowned Robotcist, Dr. Light Yagami. With him will be his latest creation - The Reploid X Prototype!! How exciting!!! The Reploid X Prototype will be the first reploid ever to have the power of 'choice.' Only five participants can take part in this seminar, so only the chosen will marvel in the Future!!!!

Register **Drop**

The screen lists open seminars in the list box at the top. To sign up for a seminar, the student can click the "Register" button. The "Register" button will be disabled if the registration date/time has passed or if that seminar's registration is closed, cancelled, or filled.

 **Tip:** If the student is already registered for the seminar, a check will appear in the checkbox in the Registered column.

After registering to the seminar, the student should click on the "Close" button to return to the main sign-in screen.

 **Note:** New for version 2016 and later, you can now initiate a Seminar Sign-in from the Tutor Pad and then determine which students that signed up for the seminar actually showed up for it. You can also allow only select students or a student group to be allowed to register.

APPOINTMENTS SIGN-UP

Module: Appointments.

Purpose: To allow the student to find open slots and schedule appointments.

Access: This screen appears to student when clicking the "Appointments" button in the main sign in screen.

Clicking on "Appointments" in the student main sign-in screen will bring up a box asking the student for his or her ID number. Once entered, the student has the options to view and or cancel existing appointments, or to create new ones.

If View/Cancel Appointment is selected, then the Cancel Appointment window will open. To cancel an appointment, the student would click the checkboxes next to one or more of the appointments then click the Cancel Appointment button at the bottom of the screen.

AccuSQL - Build 19.0.0

Cancel Appointment

Click on a Appt Date, Class, or Staff header to sort by it

All Future Appointments

Student	ID	Appt Date	From	To	Class	Staff	Exclusive	Default Instructoi
Graff-Rapoza, Steffanie	3333333	12/14/2018	02:30 PM	03:00 PM	ENG405 - Software Engineering [Course Tutori	Basoz, Cetin	Yes	Nasser, Mon
Graff-Rapoza, Steffanie	3333333	12/11/2018	03:00 PM	03:30 PM	Adv Appt [Advising]	Guzman, Julian	Yes	
Graff-Rapoza, Steffanie	3333333	12/14/2018	04:00 PM	04:30 PM	Adv Appt [Advising]	Guzman, Julian	Yes	

Cancellable Appointments

Student	ID	Appt Date	From	To	Class	Staff	Exclusive	Default Instru
<input checked="" type="checkbox"/> Graff-Rapoza, Steffanie	3333333	12/14/2018	02:30 PM	03:00 PM	ENG405 - Software Engineering [Course Tutori	Basoz, Cetin	Yes	Nasser, Mon
<input type="checkbox"/> Graff-Rapoza, Steffanie	3333333	12/11/2018	03:00 PM	03:30 PM	Adv Appt [Advising]	Guzman, Julian	Yes	
<input type="checkbox"/> Graff-Rapoza, Steffanie	3333333	12/14/2018	04:00 PM	04:30 PM	Adv Appt [Advising]	Guzman, Julian	Yes	

Cancel Appointment

 **Tip:** You can set rules about appointment cancellations in the View Appointments >> Setup >> Restriction Options screen.

 **Note:** If you want to enable students to be able to make appointments via a Web-browser, the Web Gateway MVC plugin is a perfect solution for you. Please contact us at info@engineerica.com to get the details.

If Schedule New Appointment is selected, then either the Appointment Wizard or the Quick Scheduler screen will open, depending in which scheduler you choose to present to your students in the Set Appointments >> Setup screen.

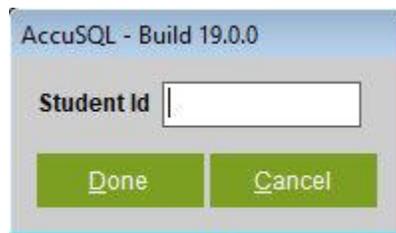
 Use Appointment Wizard instead of Quick Scheduler for student's appointments.

SCHEDULING AN APPOINTMENT USING QUICK SCHEDULER

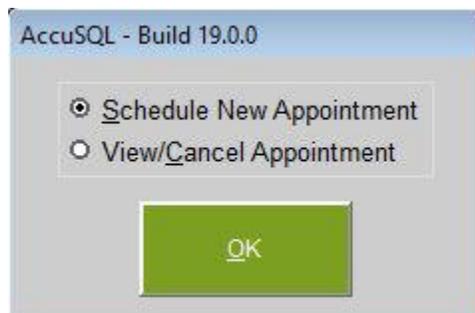
From the main sign-in screen, the student would click the Appointments button:



Then enter his/her ID in the Student ID box:



The Create or View/Cancel Appointments screen will open:



If Schedule New Appointment is selected, after the student press OK, the Quick Scheduler screen will open:

AccuSQL [Steffanie Graff-Rapoza]

Quick Scheduler

(1) Select Category

- Advising
- Computer Use
- Course Tutoring
- Math Tutoring
- Success Center

(2) Select Class

- Adv Appt
- Career Placement
- Degree Audit
- Grad Check
- Graduation Meeting
- New Student

(3) Select Date < Tue, Dec 11, 2018 >

(4) Select an open slot

Tutor	07 AM	08 AM	09 AM	10 AM	11 AM	12 PM	01 PM	02 PM	03 PM	04 PM	05 PM	06 PM	07 PM	08 PM	09 PM	10
Guzman, Julian	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Bright, Cindy		0	0	0	0	0	0	0	0	0	0					

Appt. Duration is minimum 30 minutes and maximum 60 minutes Appointments can start at 30 minutes increments

Close

Click a Category on the left (1) and the activities listed for that category will appear in the (2) Select Activity list. Click the activity for which the appointment will be scheduled. Next, click the date when the appointment will occur. You can click the left or right arrows to scroll day by day, or click the drop-down box next to the date display to select a day from a calendar view.

A list of tutors that are available for the selected activity and for the selected day (based on the tutor activity assignments and tutor schedules you have created) will appear in the (4) Select an open slot display area.

To schedule the appointment, click on the O (which stands for open) on a time slot adjacent to the desired tutor. The Scheduling Appointment box will appear:

AccuSQL [Steffanie Graff-Rapoza]

Quick Scheduler

(1) Select Category

- Advising
- Computer Use
- Course Tutoring
- Math Tutoring
- Success Center

(2) Select Class

- Adv Appt
- Career Placement
- Degree Audit
- Grad Check
- Graduation Meeting
- New Student

(4) Select an open slot

Tutor	07 AM	08 AM	09 AM	10 AM
Guzman, Julian	O	O	O	O
Bright, Cindy	O	O	O	O

AccuSQL - Build 19.0.0

Category:

Class:

Staff:

Time:

Appointment Note (Max 100 characters):

Duration:

Appt.Duration is minimum 30 minutes and maximum 60 minutes

Appointments can start at 30 minutes increments

Based on your appointment rules (min and max appointment length settings you can click the Duration drop-down box to expand the appointment length. You can also add any notes for that appointment. Click the Schedule button to schedule the appointment. After you click Schedule, the system will send an appointment confirmation to the tutor and student and remove the O (open) slot from the appointment grid.

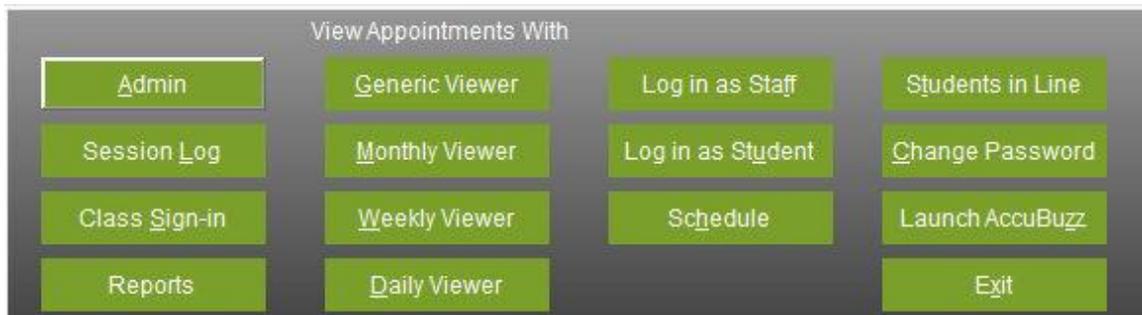
Note: If you use group appointments, then the O (open) slot will remain until the max number of students in group appointment settings are reached, then the open slot will be removed.

TUTORS SIGN-IN

You can use AccuSQL/AccuTrack to track your tutor work hours. Tutor sign-ins are saved in their own table and are reported separately.

To track tutor work hours, first enter the tutor info in the Tutor screen. When a tutor signs in:

The *Tutor Pad* will appear:



Note: The Tutor Pad can be configured to either require an ID and password for tutor logins, or require an ID only. These settings are discussed in the Tutor Pad options, found later in this document.

The *Tutor Pad* has the following buttons:

- **Admin:** If the admin gives the tutor access to the administration screen, this button will be enabled. Clicking on it will take the tutor to the System Administration screen. Note: The options available for tutors to access in Admin is set in the System Access >> System Access Groups screen. Select the Tutors group and then select Edit to modify those settings.
- **Session Log:** Launches the Session Log screen where tutors can enter notes for any sessions they have had with students and/or fill out the Session Questionnaire.
- **Class Sign-in:** Starts a class sign-in session. Details below.
- **Reports:** Allows tutor to generate reports as determined by the. Reports Access for the Tutors access group.
- **Generic Viewer:** Launches a generic appointment viewer.
- **Monthly Viewer:** Launches a monthly appointment viewer.
- **Weekly Viewer:** Launches a weekly appointment viewer.
- **Daily Viewer:** Launches a daily appointment viewer.

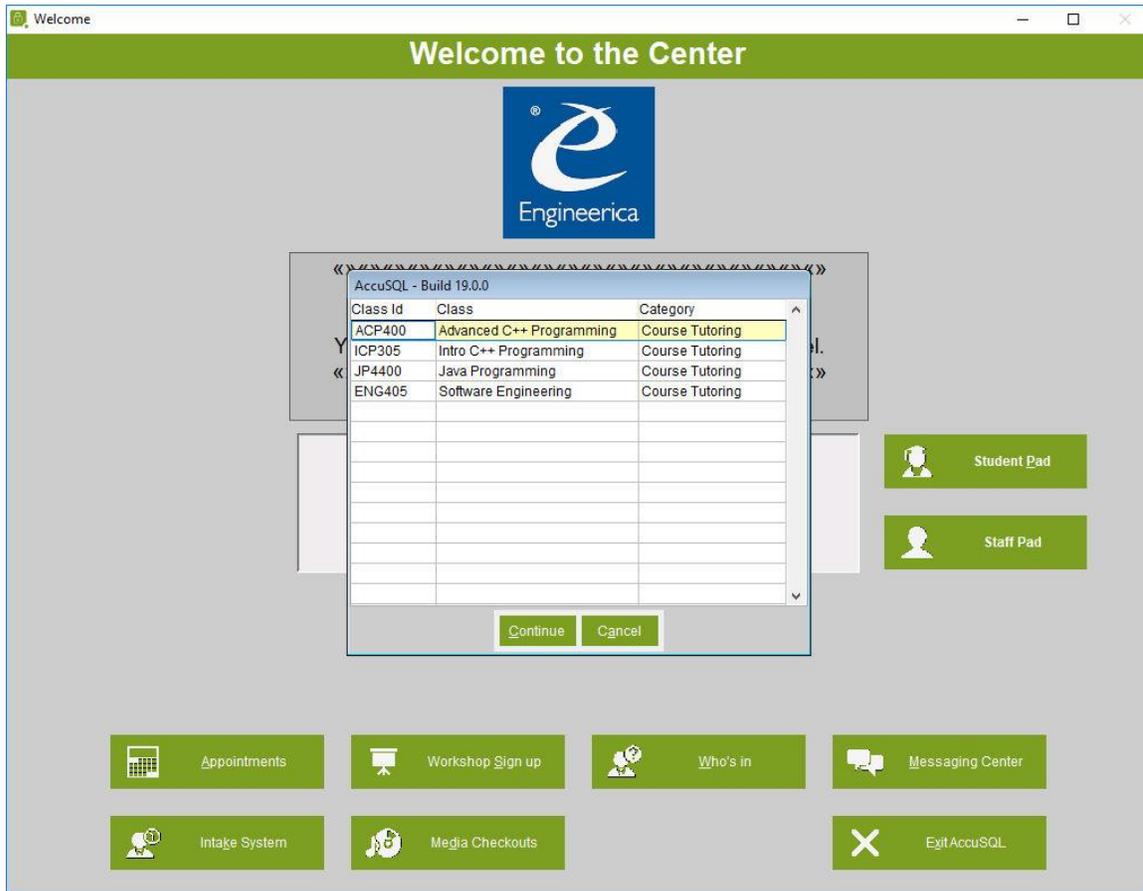
- **Log in as Staff:** Sign in as a tutor. You have the option to either have the tutors sign in and record their work period, or you can setup Tutor Visits Tracking >> Tasks to create categories and then tasks under them that that tutors can select from at sign-in.
- **Log in as Student:** Sign in as a student to use the center’s services. Note: You can add tutors and students in AccuSQL/AccuTrack using the same ID. This is the only condition where any users can have the same ID entered in the system.
- **Schedule:** Displays tutor’s schedule and allows tutor to create their own regular (semester) or custom schedules.
- **Students in Line:** If Intake System is turned on and admin allows it, tutors can see the students waiting to see them and then sign the students in.
- **Seminar Sign in:** If any seminars are available (i.e. are set to start in the next 30 minutes), click this button to select the seminar and then students can sign into it so you can collect attendance. Details below.
- **Launch AccuBuzz:** Allows tutors to receive alerts at their computers when a student signs in to see them or is placed in the Intake System. The alerts appear as pop-up boxes from their windows taskbar. Note: the AccuBuzz program runs external to AccuSQL/AccuTrack.
- **Change Password:** Allows the tutor to change his or her password.
- **Exit:** Close the *Tutor Control Pad*.

CLASS SIGN-IN

If you have a large group of students signing in to the same activity and working with the same tutor, you can use the class sign-in mode to quickly sign these students in. This is useful, for example, for signing students into SI (Supplemental Instruction) classes. To start a Class Sign-in session, the tutor needs to click on the *Class Sign-in* button:



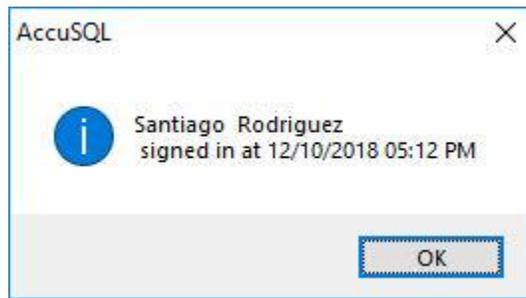
AccuSQL/AccuTrack will display a list of the activities the tutor is associated with:



The tutor can then select the activity he/she wants to mass students to by double clicking on it. The message on top of the ID Entry box will change to indicate the mass sign-in mode. The mass sign-in class and tutor's name will appear in the message:



AccuSQL/AccuTrack will sign the tutor in. Students can now sign in by simply entering their ID number. The class and tutor are automatically selected.

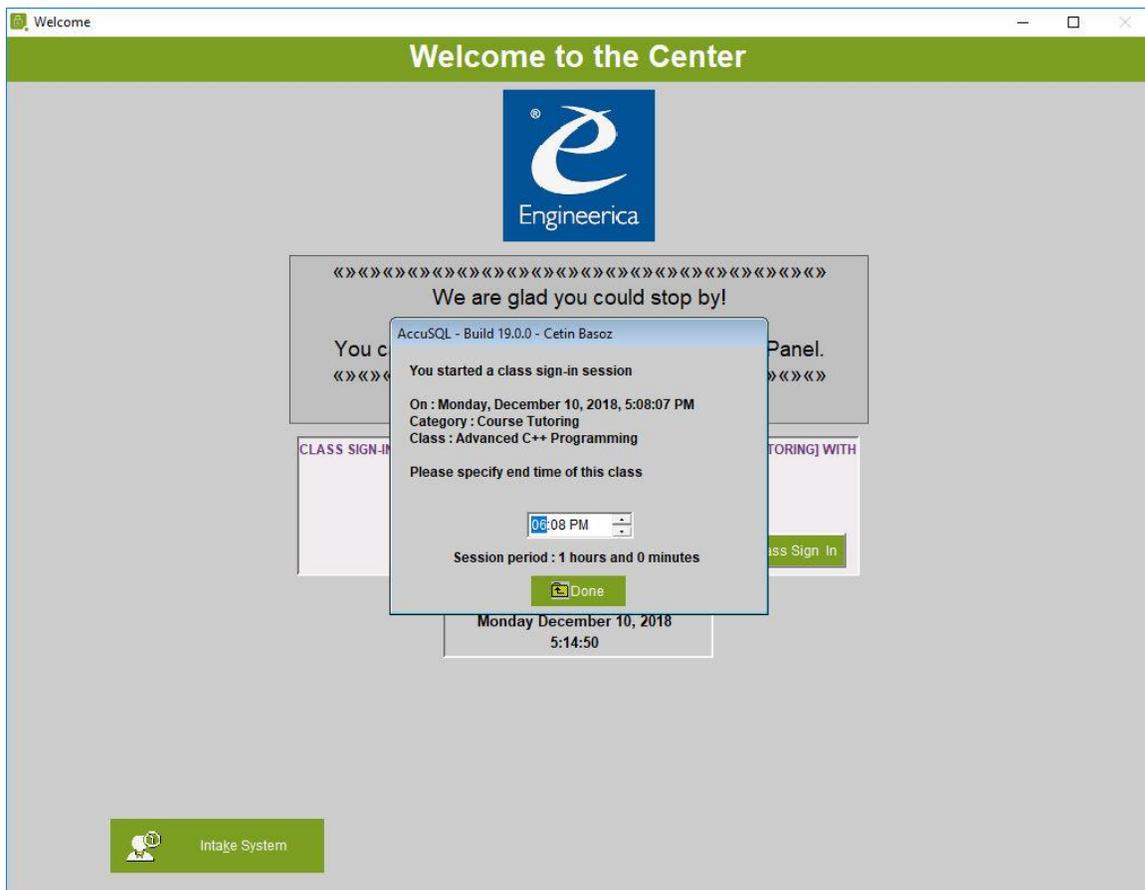


To end class sign-in, click on the “End Class Sign in” button.

Note: Only students who are already in the AccuSQL/AccuTrack database can sign in while in class sign-in mode. New students are not allowed while in this mode.

CLASS SIGN OUT

When the tutor who activated a class sign-in session signs out, AccuSQL/AccuTrack will display this box:



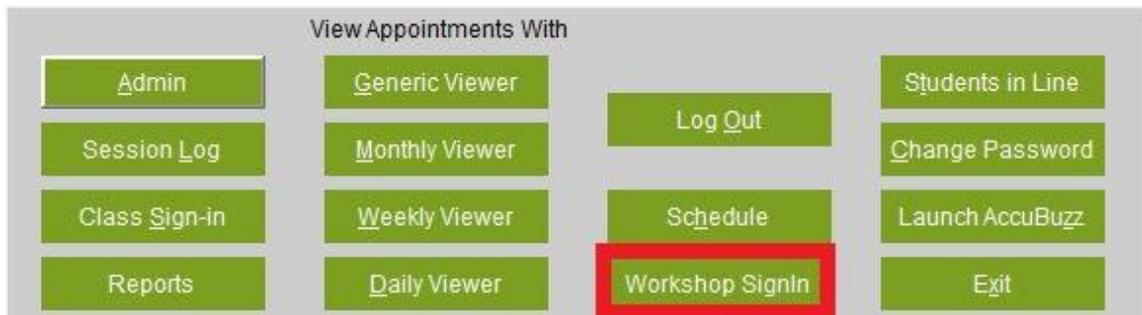
The tutor can keep the default session end-time, which defaults to one hour, or he/she can adjust it and click “Done”. AccuSQL/AccuTrack will sign the tutor out and will also sign out all the students of the class sign-in session.

 **Note:** You can password protect the End Class Sign in Option in the Users >> Setup >> Student and Tutor Pad Options screen.

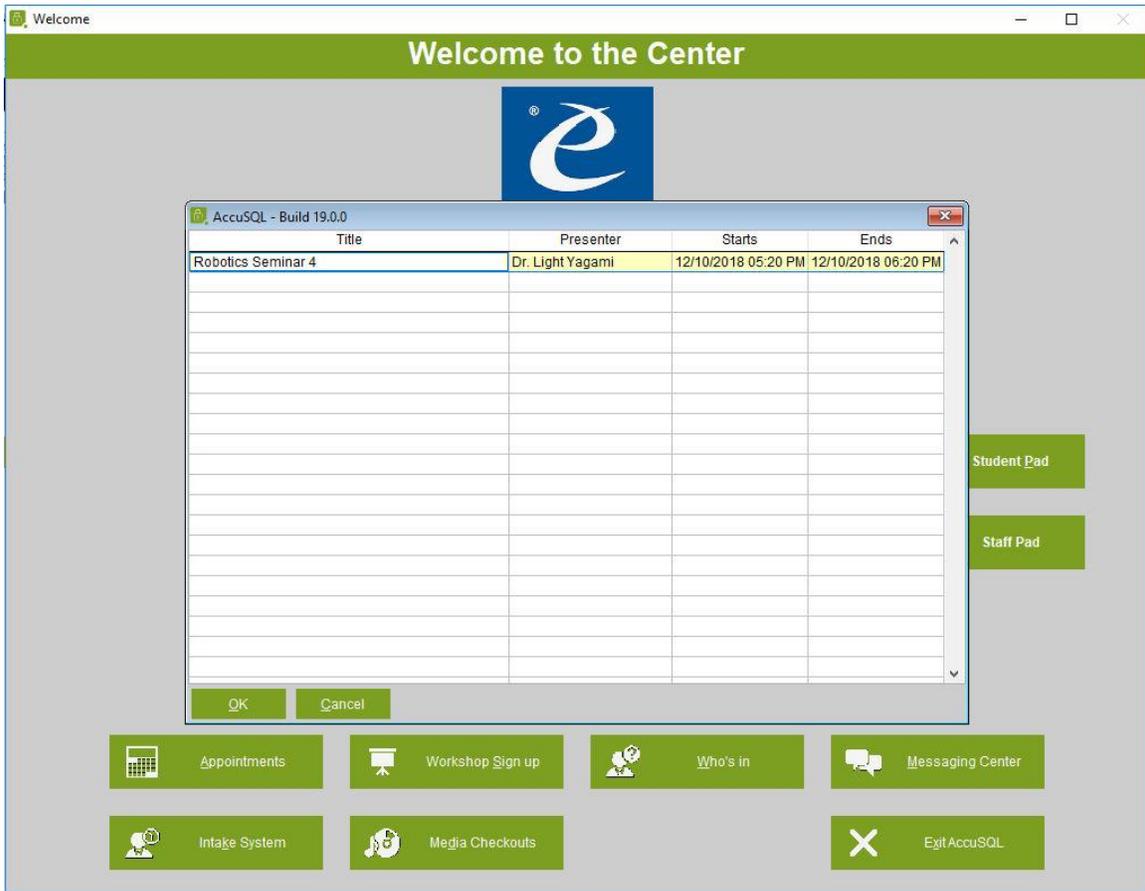
SEMINAR SIGN IN

When you create Seminars in AccuSQL/AccuTrack, there are settings for the date and time when the seminar starts and when it ends. Using those settings, a tutor can initiate the Seminar Sign in for the seminar. 30 minutes before the seminar is set to being, it will automatically be available in the Seminar Sign-in Pick list.

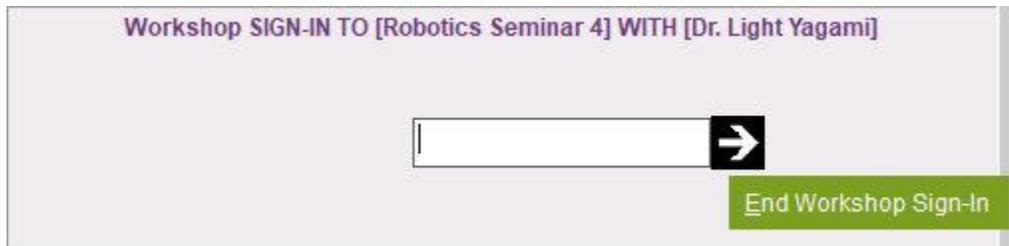
To initiate the Seminar sign in, login as a tutor and then select the Seminar Sign In button from the Tutor Pad:



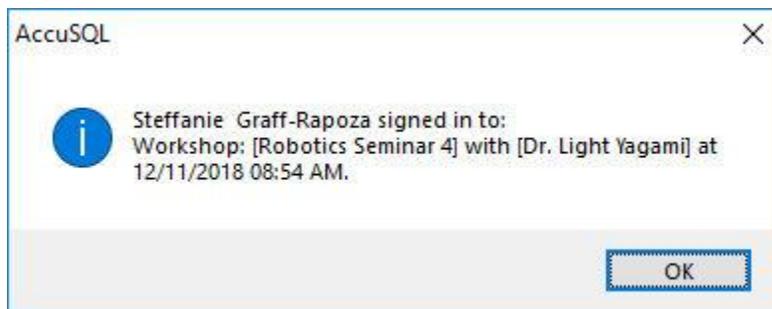
Any seminars that will be starting within a 30 minute window will be available from the pick list. Select the seminar students will be signing into and click OK.



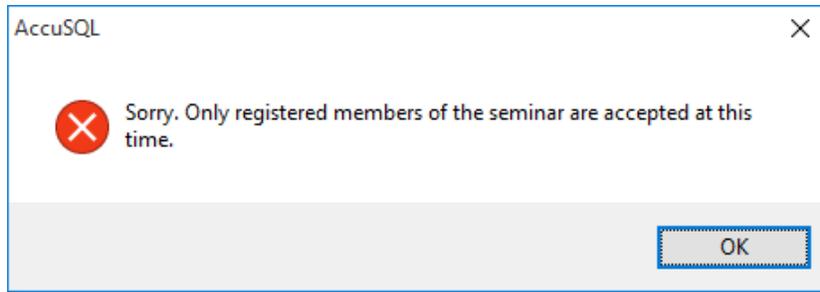
You will be returned back to the Main Sign in Screen with that seminar selected.



Students can then sign into the seminar by entering their IDs.



If the student tries to sign in and is not registered for the seminar, they will get a message indicating they cannot sign in.



Tip: Since the AccuSQL/AccuTrack station will be locked down while the seminar sign-in process is active, if you need to register a student for the seminar “on the fly” so they have the capacity to sign-in, you can open a second AccuSQL or AccuTrack, login as an admin and then go to Seminars >> Seminar Status to register the student .

SYSTEM ADMINISTRATION SCREEN

Module: System Administration

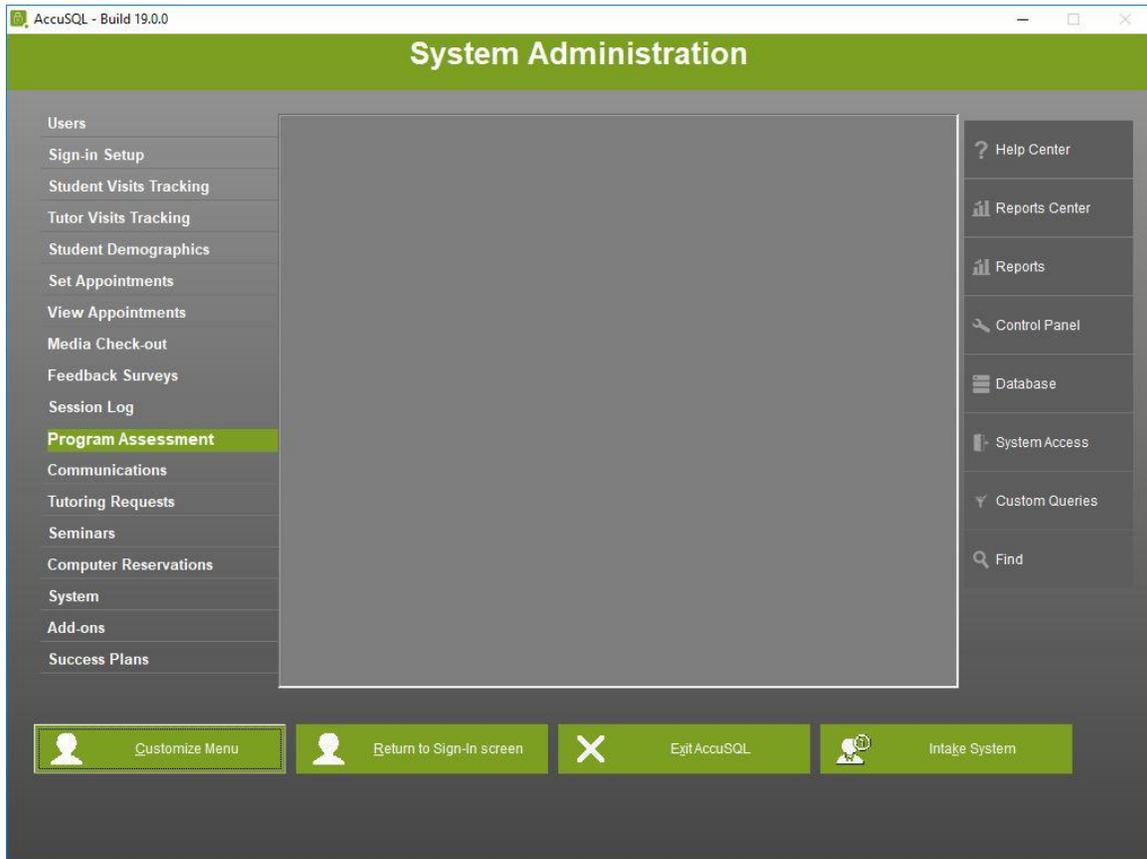
Purpose: To setup the software configuration settings, add data, and generate reports.

Access: From the Main Sign-in screen, enter the System Administration ID and password.

The System Administration screen provides access to setting up the software and generating reports. To access the System Administration screen, you need to enter the **administrator ID** and **password**. For new installations, the ID is “11111111” and the password is “NEW” (all upper case):

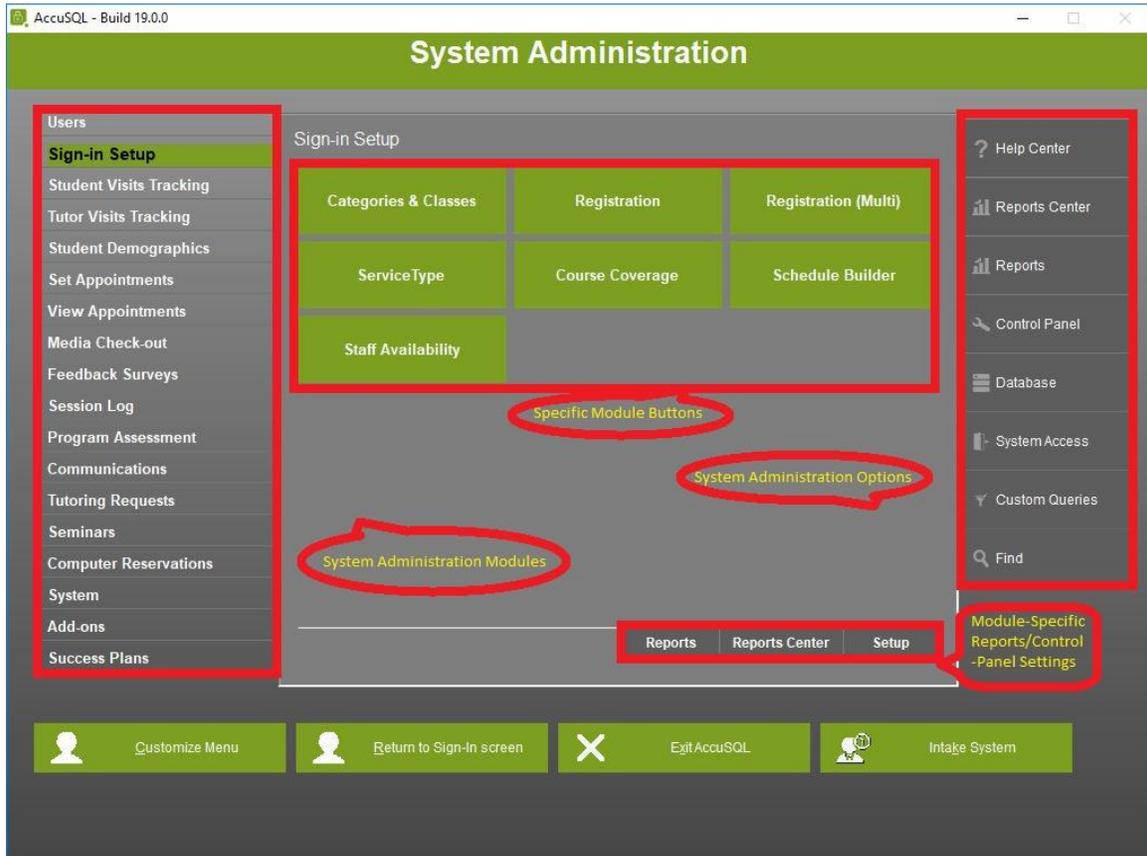


Enter the ID and press the Enter key on the keyboard. Now enter the password and press the Enter key on the keyboard. If you enter the correct ID and password, you will see the **System Administration** screen.



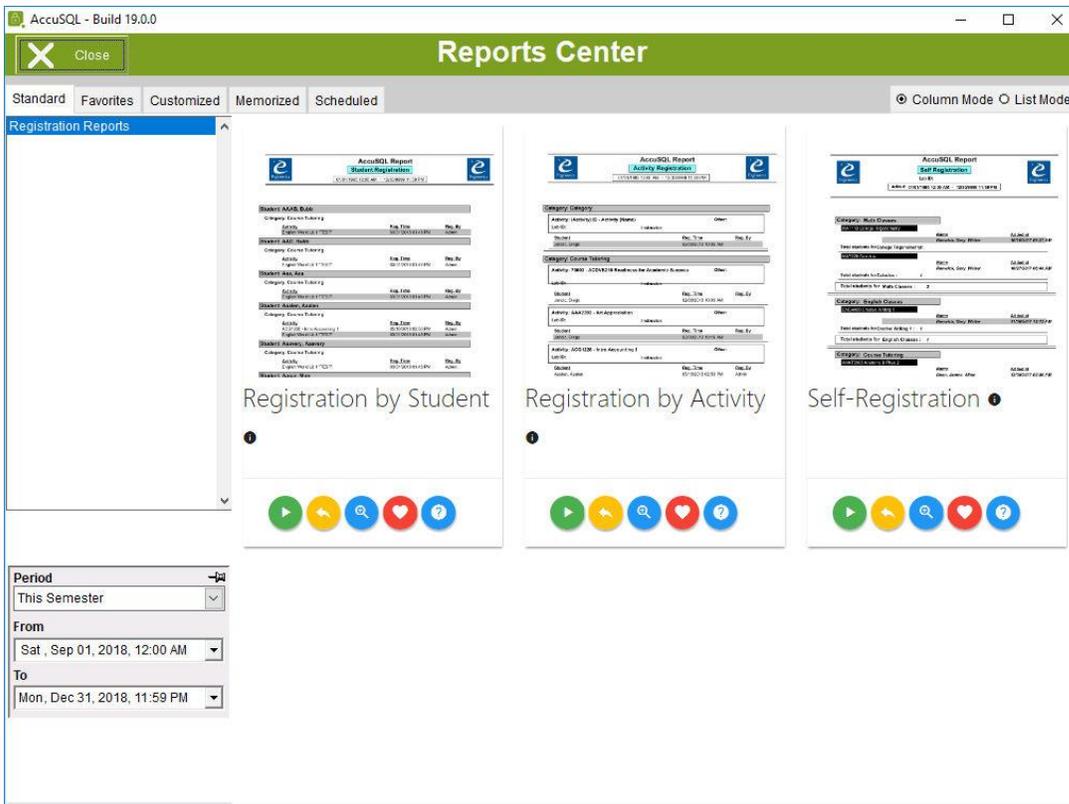
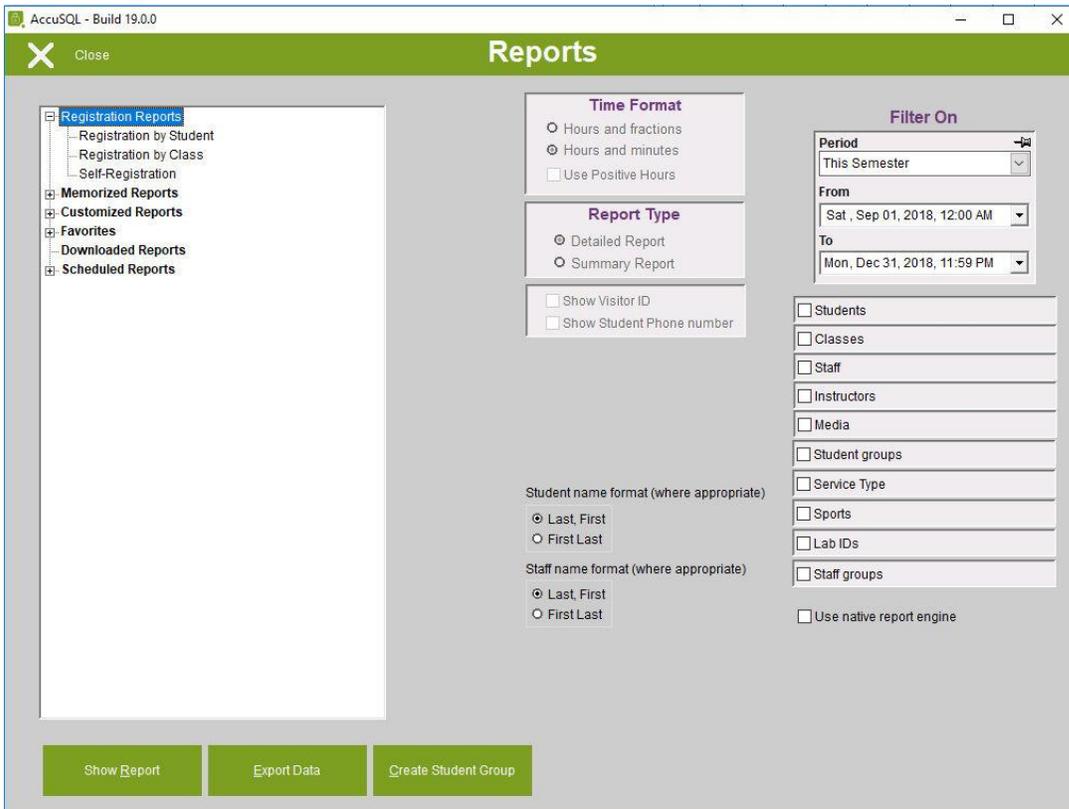
ORGANIZATION OF THE SYSTEM ADMINISTRATION SCREEN

The System Administration screen contains several elements. Please review the following screen to see how these elements are organized.

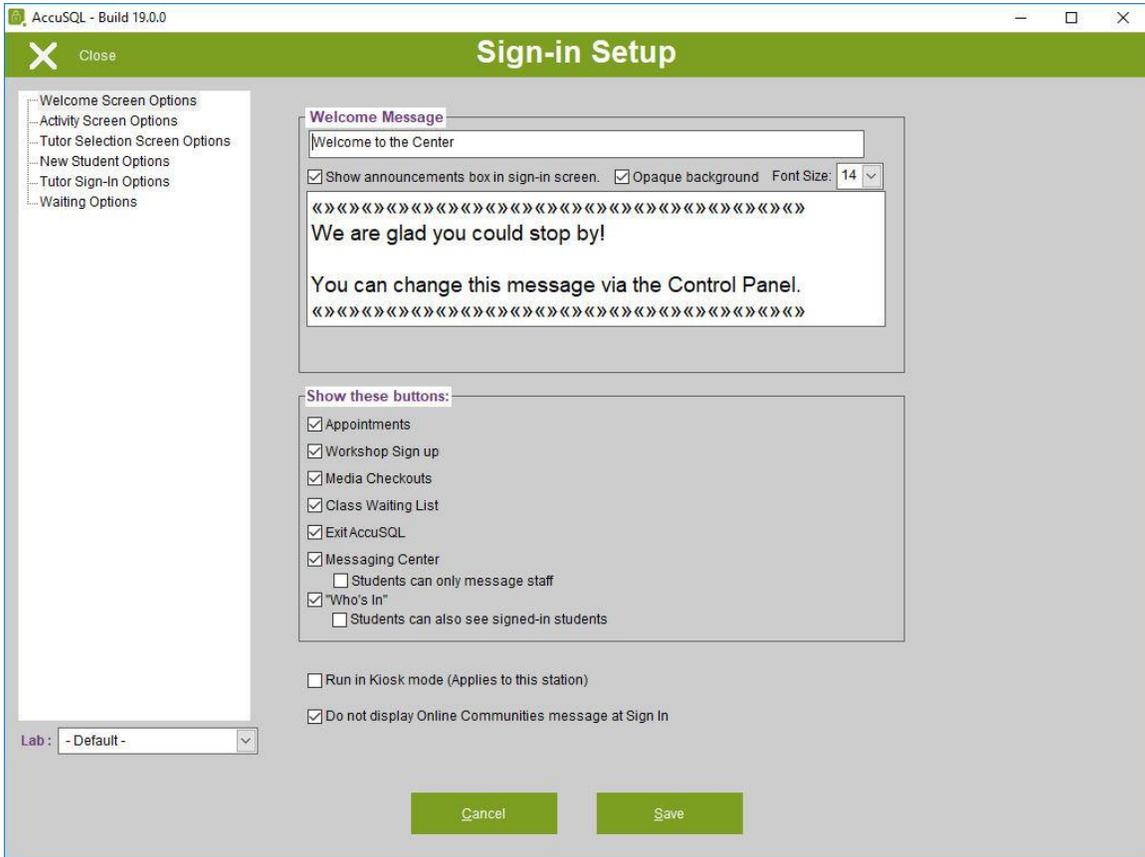


The left side of the System Administration screen contains the System Administrative Modules you will be accessing in AccuSQL/AccuTrack. If you click on one of the available modules, then the buttons associated with that module will appear in the center. For example, if you clicked on Sign-in Setup, then the modules associated with Sign-in Setup will appear in the center area.

Since the Sign-in Setup module was selected from the System Administrative Modules, if you click the Report link or the Reports Center link (both at the bottom right of the screen) you will be accessing the Sign-in Setup Reports available in AccuSQL/AccuTrack.



If you click the Setup link (bottom right of screen) you will see the various Control Panel options related to Sign-ins Setup.

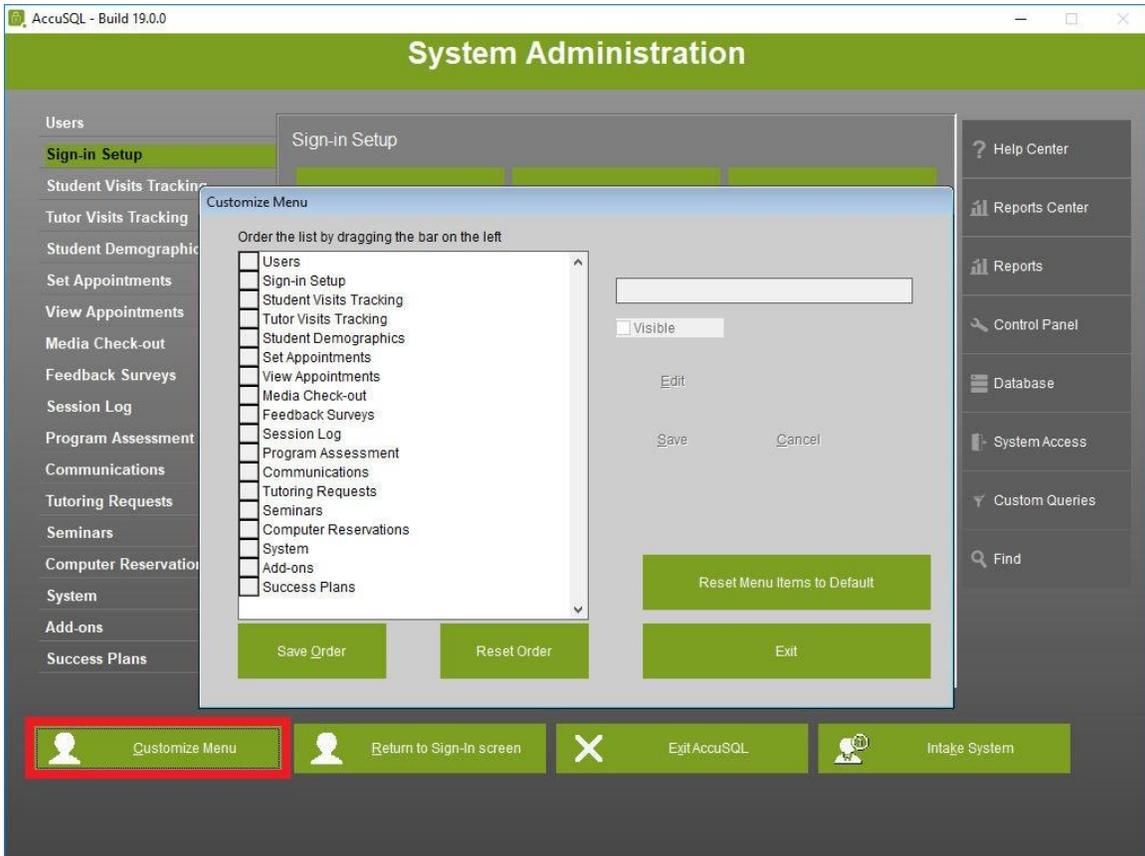


Each of the modules will behave in the same way. So for example, if you click Users (yours may be called Students, but is it the top left option in the System Administrative Modules), you will see the setup screens for Users (students, tutors, instructors, etc.). If you click Reports, you will see all reports related to Users and if you click Setup, you will see the Control Panel options for Users.

Note: Depending on your access level, some of the options on this screen may not be available to you. The options available for access levels are setup using Access Groups.

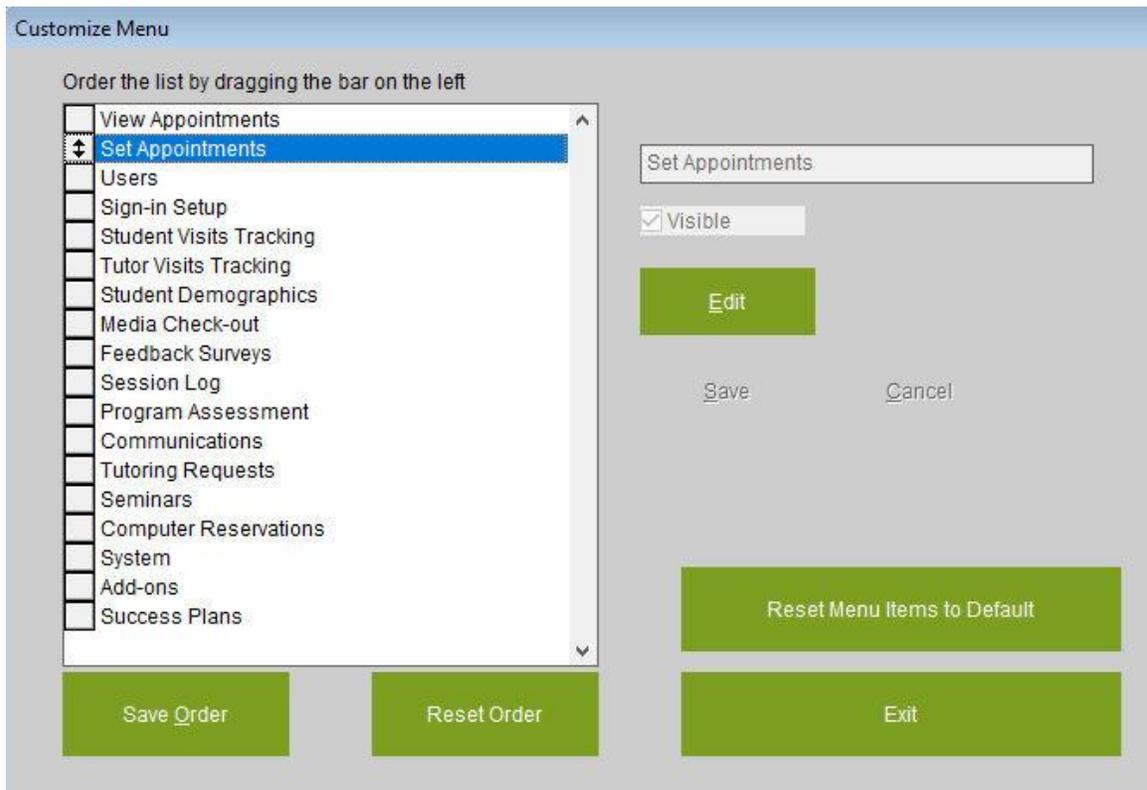
CUSTOMIZING THE MAIN MENU OPTIONS

You can reset the order of your Main Menu options and also change the labels for what those menus display. To do so, click Customize Menu from the System Administration screen.

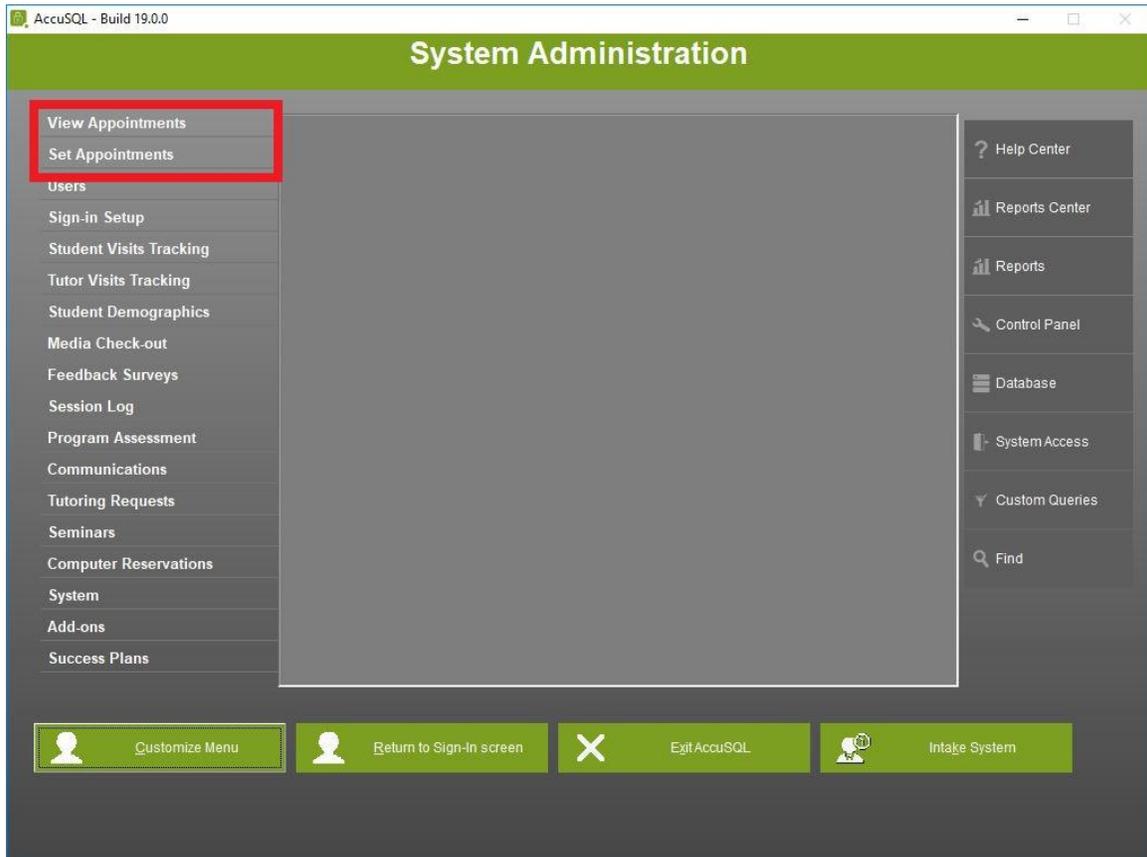


To change the order of a module, click on it in the list on the left, then you can hold the left mouse button and drag the item either up or down to its new position. After you are done, click the Save Order button to save your changes. Also, you can click Reset Order to put the list items back to their original order.

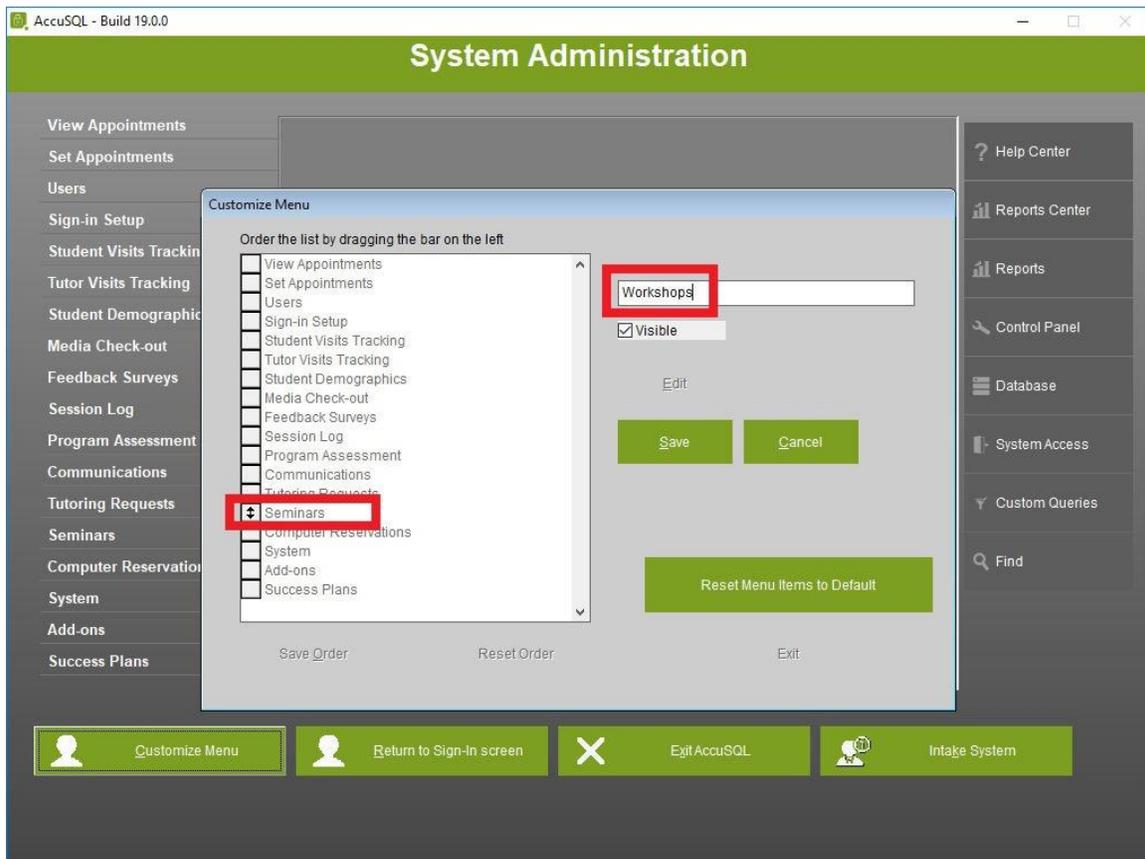
In the following example, the View Appointments and Set Appointments modules have been moved to the top position in the list.



After clicking Save Order, and then Exit, the changes will be reflected in the System Administration screen.



In the Customize menu screen, you also have the option to change the menu labels and also to hide the menu options that you will not use. To change a label, click on it in the list on the left, then click the Edit button. In the following example, the label Workshops has been changed to Seminars.



After you have changed the label, click Save and then Exit. Your changes will be reflected in the System Administrative Modules options.

To hide a module, click on it in the Customize Menu screen, then click Edit. You can then uncheck the “Visible” checkbox to hide the menu item. After you are done, press Save and Exit and your changes will be reflected in the System Administrative Modules.

Note: If you want to reset the modules to their original settings, click the “Reset Menu Items to Default” button.

USERS SETUP

When you click on Users from the Main Menu, you will see the following options. **Note:** Depending on your version, this option may be labeled as “Students”.

- Students: Use to set up students’ data.
- Tutors: Use to set up tutor’s data.
- Instructors: Use to add or edit instructors.
- System Administrators: Use to set up system administrators and assign them an access group.

- Student Groups: Allows you to view and manually build student groups. These groups can be used as filters in several places in the system.
- Student Athletes: Allows you to create sports and then register students in them. You can also create required hours for members of these teams.
- Grants Recipients: Allows you to create grant definitions and then assign them to students.
- Tutor Groups: Allows you to view and manually build tutor groups. These groups can be used as filters in several places in the system.

The following sections contain more information on the above screens.

STUDENTS

Purpose: To add a new student or modify the information for existing students.

Access: Users >> Students.

The screenshot shows the 'Students' management interface in AccuSQL. The main form contains the following fields:

- ID:** 3333333
- First:** Steffanie
- Middle:** (empty)
- Last:** Graff-Rapoza
- E-mail Address:** juliang@engineerica.com
- Card ID:** (empty)
- Address:** 299 West Lane Hwy
- City:** Sanford
- State:** FL
- Zip:** 32773
- Phone:** Home () - , Cell () - , Other () -
- Phone note:** (empty)
- Comments:** (empty)
- Birth Date:** (empty)
- Active:**
- Do not send Text Messages:**

Below the form is a table of students:

Student Name	Student Id	Active Card Id
Basoz, Cetin	5550666	Yes
Blodgett, Chadd	9999999	Yes
Bright, Cindy	4440555	Yes
Conner, Jenelle	7777777	Yes
Crabtree, Sarah	555555555	No
Crabtree, Sarah	5555555	Yes
Graff-Rapoza, Steffanie	3333333	Yes
Guest, AccuSQL	_AccuTrackG	No
Guzman, Julian	1234567	Yes
Rodriguez, Santiago	4444444	Yes
Schmidt, Paul	2222222	Yes
Thongpaen, Tawan	8888888	Yes
Torres, Julia	6666666	Yes

At the bottom of the window, there are buttons for '+ Add', 'X Delete', and 'Edit'. Below the table, it says '13 Students' and 'Hide inactive students'. At the very bottom, there is a navigation bar with buttons for 'Show Web', 'Proper Case', 'Set Active/Inactive', 'Profile', 'Assign Picture', 'Tutoring Request', 'Attachments', 'Change Password', 'Appointments', 'Registration', 'Visits', 'Tutors', 'Groups', 'Tutoring Requests', 'Seminars', and 'Advanced'.

You will notice a list of students sorted alphabetically by last name. The list box has four columns. The first column shows the student’s last name, first name, and middle name. The second column shows the student’s sign-in ID. The third column shows the user’s status. A “Yes” in the Active column indicates the user is active, while a “No” indicates an inactive user. The fourth column shows the secondary (Card ID

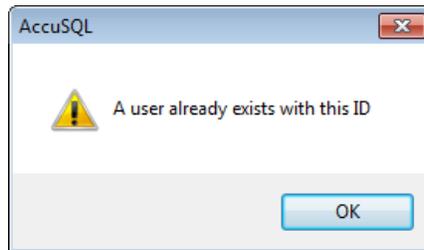
that can be used for the student as alternate sign-in credential. **Note:** The Card ID option for students is enabled in the Control Panel >> ID Settings Options screen.

ADDING A STUDENT

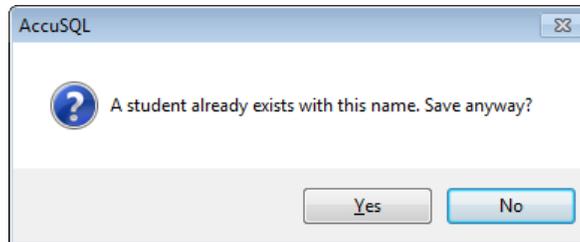
To add a new student, simply click the **Add** button and then fill in his or her ID number and name. You can also fill in the contact info and the also click the Profile button to answer to the profile questions. Click the **Save** button to save your entry.

 **Tip:** You do not need to hold the <Shift> key down while entering the first letter of the name. AccuSQL/AccuTrack will automatically **capitalize** the first letter of the name as you type it.

If the **user ID** you are saving is already in the database, you will see a warning message, and you will not be allowed to save the duplicate ID.



If the **name** you are entering matches another name in the database, you will see a warning message. However, you will be allowed to save the duplicate name if it has a different user ID number.



Click on the **Yes** button to save the record, or click on the **No** button to cancel.

EDITING A STUDENT

To **edit** a student record, first highlight the name by clicking on it. If you don't see the name, use the up  and down  buttons in the vertical scroll bar, or the scroll bar itself to find it. You can also click in the grid area under student name or student ID and start typing the last name or Student ID to find the record. To edit the record, click on it and then click the **Edit** button. You can also double click on the record to go into edit mode. The student's info will be copied to the text boxes and become editable. Make your changes and then click the **Save** button to keep the changes, or click on the **Cancel** button to keep the data as is.

MAKING A STUDENT INACTIVE

To **inactivate** a student, edit the student as described above, uncheck the "Active" check box, and save the record. When the student is inactive, a "No" will appear in the active column of the list box. Inactive students are not allowed to sign in, however you can still run reports on them.

HIDE INACTIVE STUDENTS (PIN)

If you inactivate students not in the import file when performing a Student Information import or set students to inactive manually, you can now hide and pin the student view grid to show inactive students or not.

When the pin is like this, it is in an unpinned state:

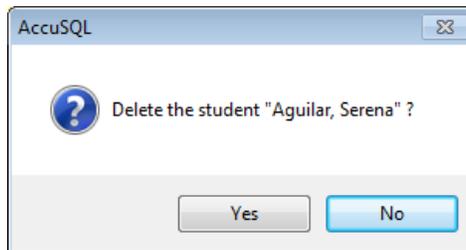


To hide inactive students, click the checkbox. If you want to pin to always hiding inactive students, click the checkbox and then click the pin. It will then display in a pinned state.

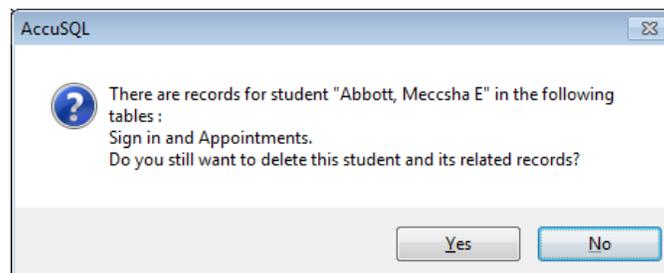


DELETING A STUDENT

To **delete** a student, first highlight the name, and then click on "Delete". You will see a confirmation message:



If you answer "Yes", AccuSQL/AccuTrack will check the database to see if there are related records in other tables. If no related records exist, AccuSQL/AccuTrack will delete the student; otherwise, AccuSQL/AccuTrack will display a message:



The message above says that this student has sign-in records and some messages. If you answer "Yes", AccuSQL/AccuTrack will delete the student's record and all related records, such as sign-in records, appointments and messages.



Warning: Be extremely careful about deleting ANY information. If you delete data, you will lose all associated data with that deleted record. It is highly recommended you instead inactivate the record.

CHANGING THE CAPITALIZATION OF THE ENTERED NAMES

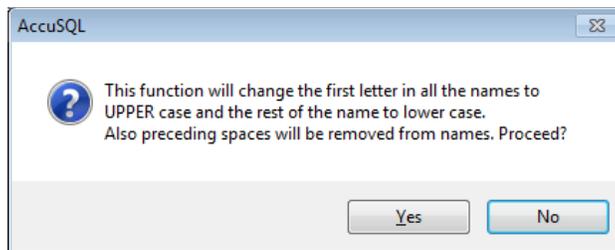
If students enter their names during their first sign-in session, the names might have the wrong capitalization. Some names might be in all UPPER caps, or in REVERSE caps. You can force proper name capitalization in two ways:

- 1) By setting the option "Force proper name capitalization..." in the Options screen.
- 2) By using the proper name capitalization function in the Modify Students screen.

To use the proper capitalization, click on the "Proper Case" button.



AccuSQL/AccuTrack will display a confirmation message:



Click "Yes" to proceed.



Note: This function will change the first letter in the name to upper cap, and the rest of the name to lower cap. It will not fix capitalization of names like "McDonald".

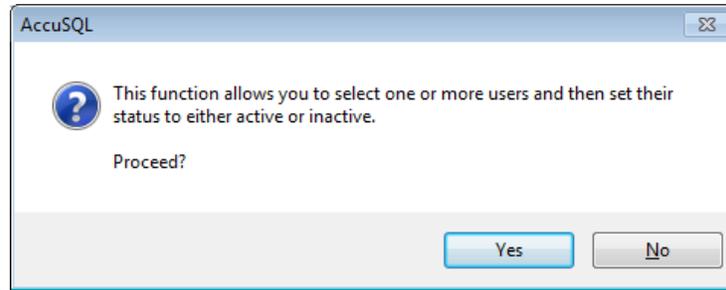
SHOW WEB (REGISTRATIONS)

Use this button if you have the AccuSQL/AccuTrack *Web Gateway* module and you allow students to register via the web. When you click on this button you will see a list of students who signed up as new

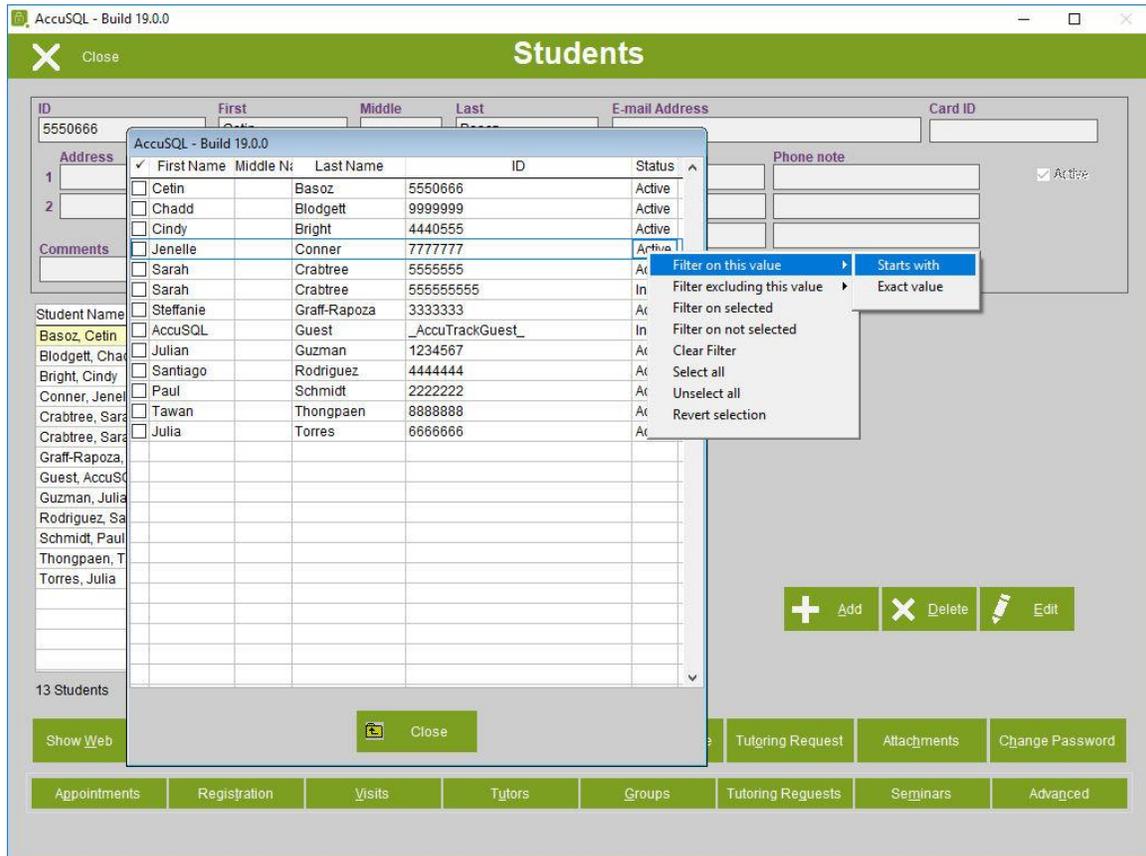
students via the web. To allow these students to schedule appointments, edit these records and make them active.

SET ACTIVE/INACTIVE

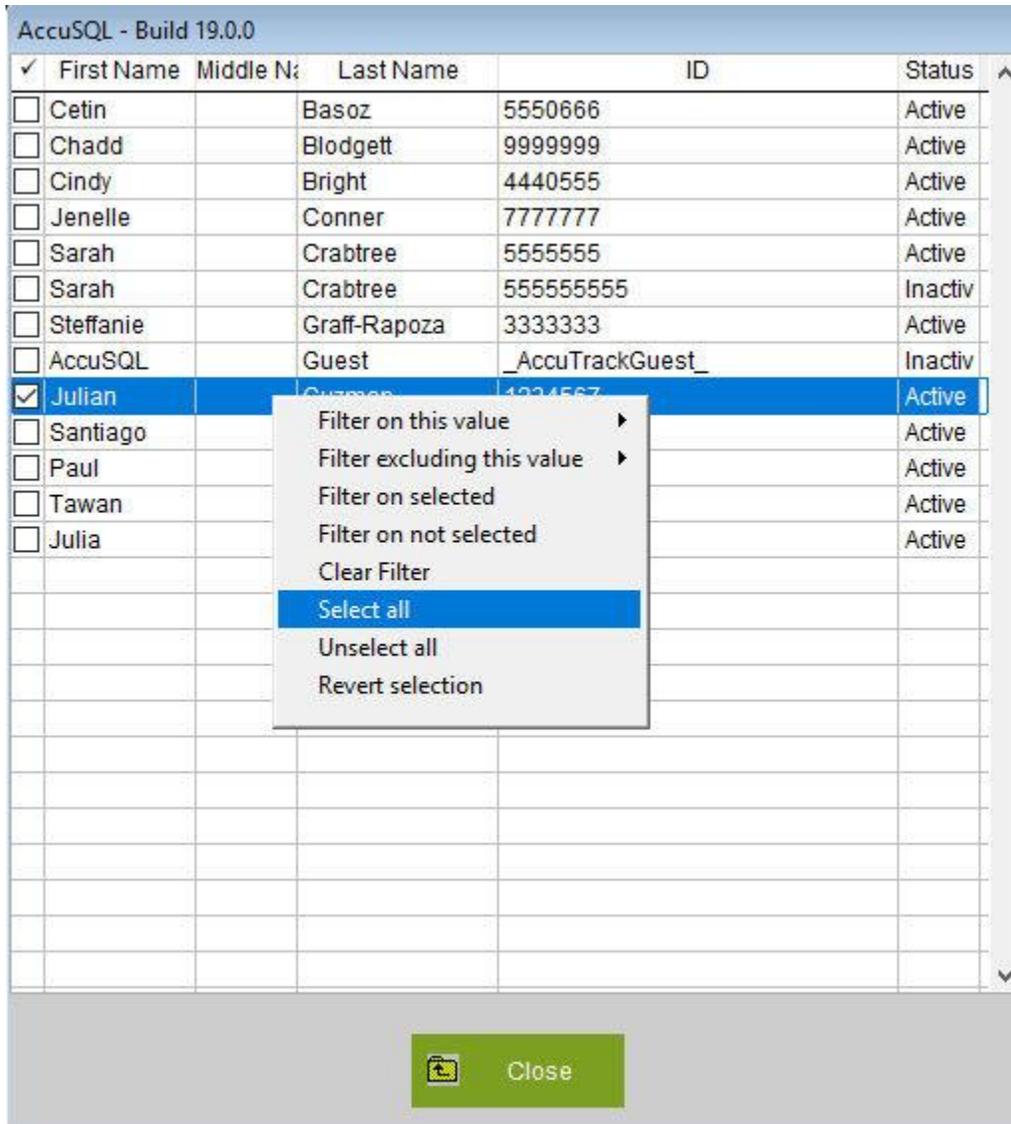
Use this button to activate or inactivate one or more students. When you click Set Active/Inactive, you will be presented with an information box about this function. Click Yes to proceed.



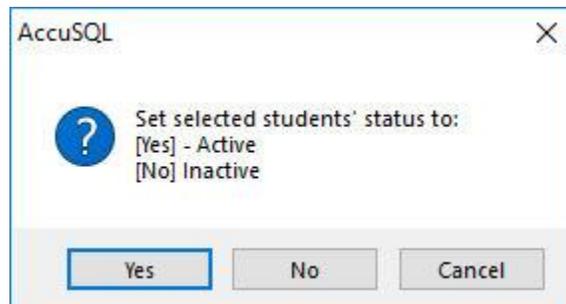
In the grid select any records, you want to activate, or inactivate and then click Close. Tip: If you right click on the Status grid for either an Active or Inactive record, you can then select "Filter on this value" >> "Starts with" to show only active or inactive records:



Tip: After you have filtered on Status, you can then right click in the grid and choose Select All to select all the records:

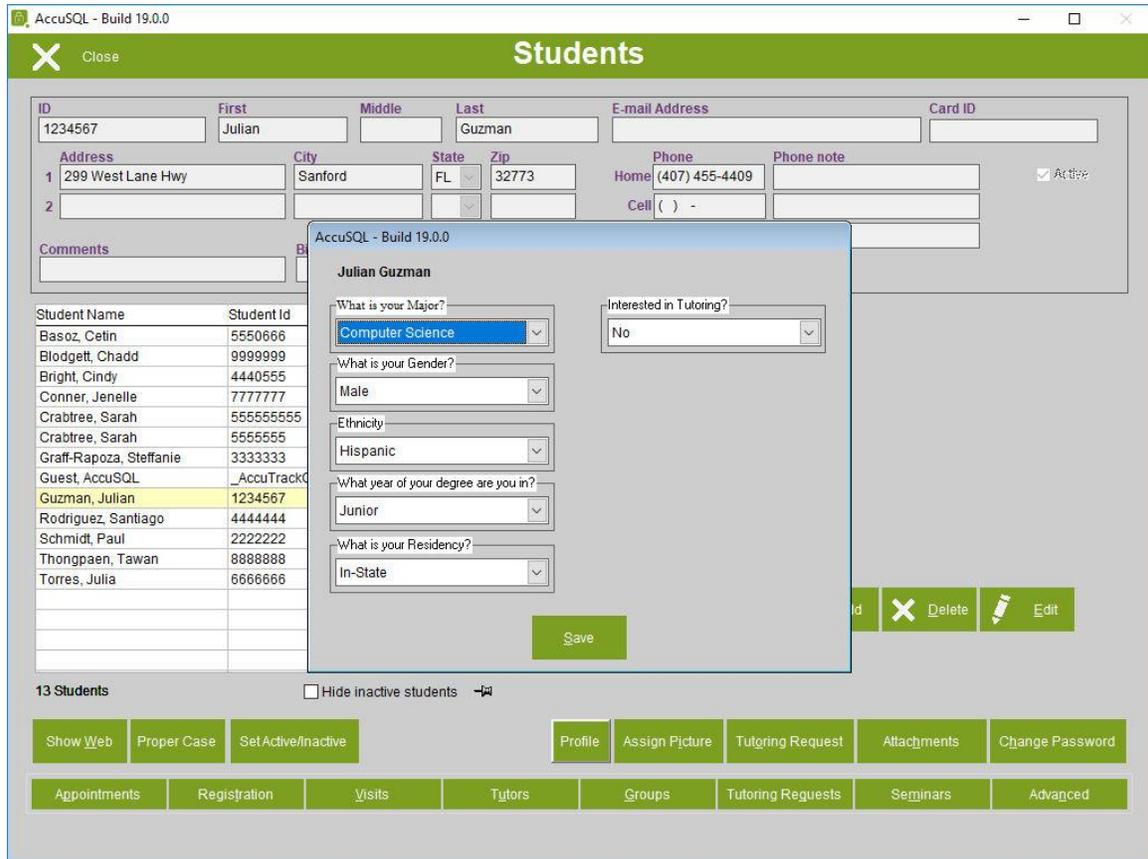


Click Close after selecting the records you want, and then click Yes to set the selected records to Active or No to set them to Inactive.



ADDING PROFILE DATA TO A STUDENT RECORD

Select a student and then click the Profile button to add profile information for the student. Profile questions and answers allow you to collect additional information, such as demographic data, or anything you would like to collect about your students. When you click the Profile button, you can add or edit any of the 10 profile fields that are available.



Click save to save your selections, or Cancel to discard them. **Note:** Profiles fields and their values are setup in the Student Demographics >> Profile Setup screen.

ASSIGN PICTURE

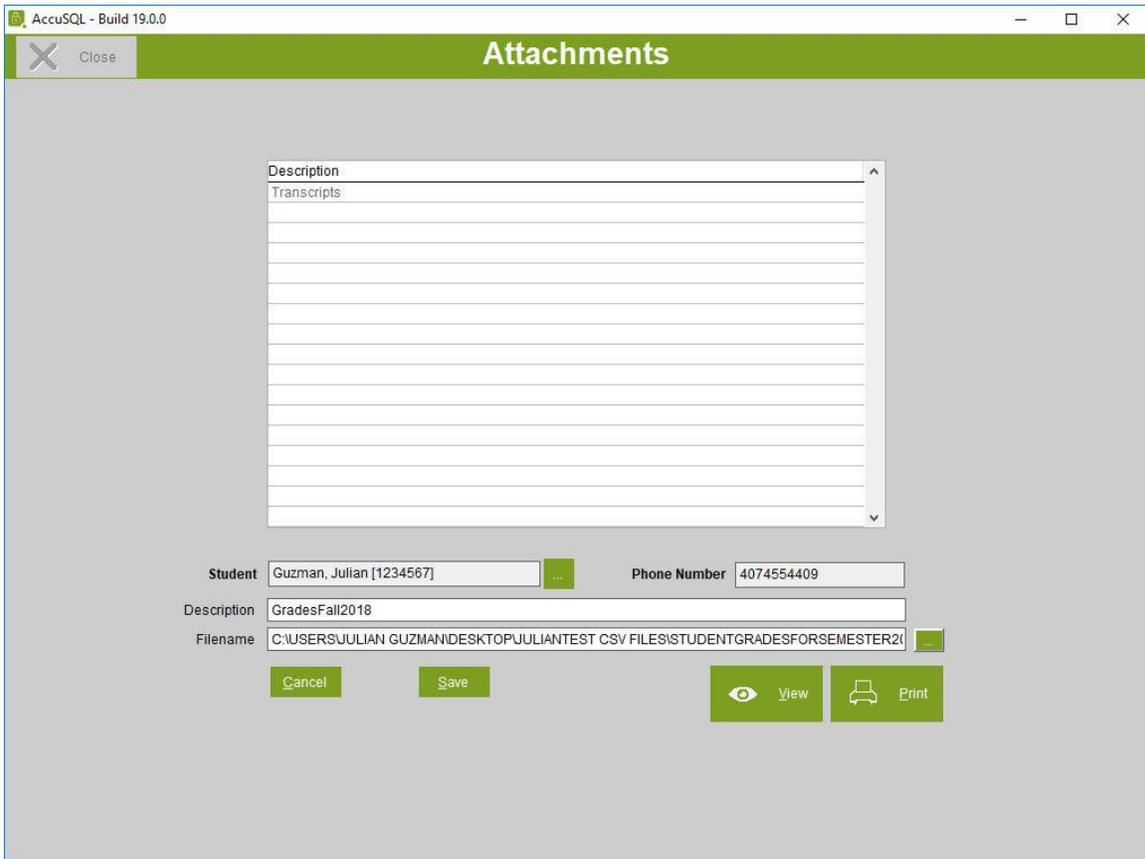
Click this button to assign a picture for the selected student. Recommended size is 200x200 pixels and you can use a .bmp, .png, .jpg or .gif file. When you click Assign Picture you will be presented with an Open Picture navigation screen where you can locate the picture you want to use and then click OK.



The selected will display on the Students screen for that student. **Tip:** If you want to assign photos to several students at once, you can use the Database >> Import >> Student Photos option.

ATTACHMENTS

Use this option to assign external files with the selected student record. When you click Attachments, a screen will open where you can click Add to add a new attachment:



Student: By default, it selects the current student you have selected in the main Students screen. If you want to select a different student, click the ... button to find them.

Phone Number: System populated.

Description: Enter a name for the attachment.

Filename: Click the ... button to navigate to the file you want to attach. After selecting the file click OK.
 Note: If it is not a Word document, change the Files of Type drop-down to see all files.

Save: Click to save the attachment link.

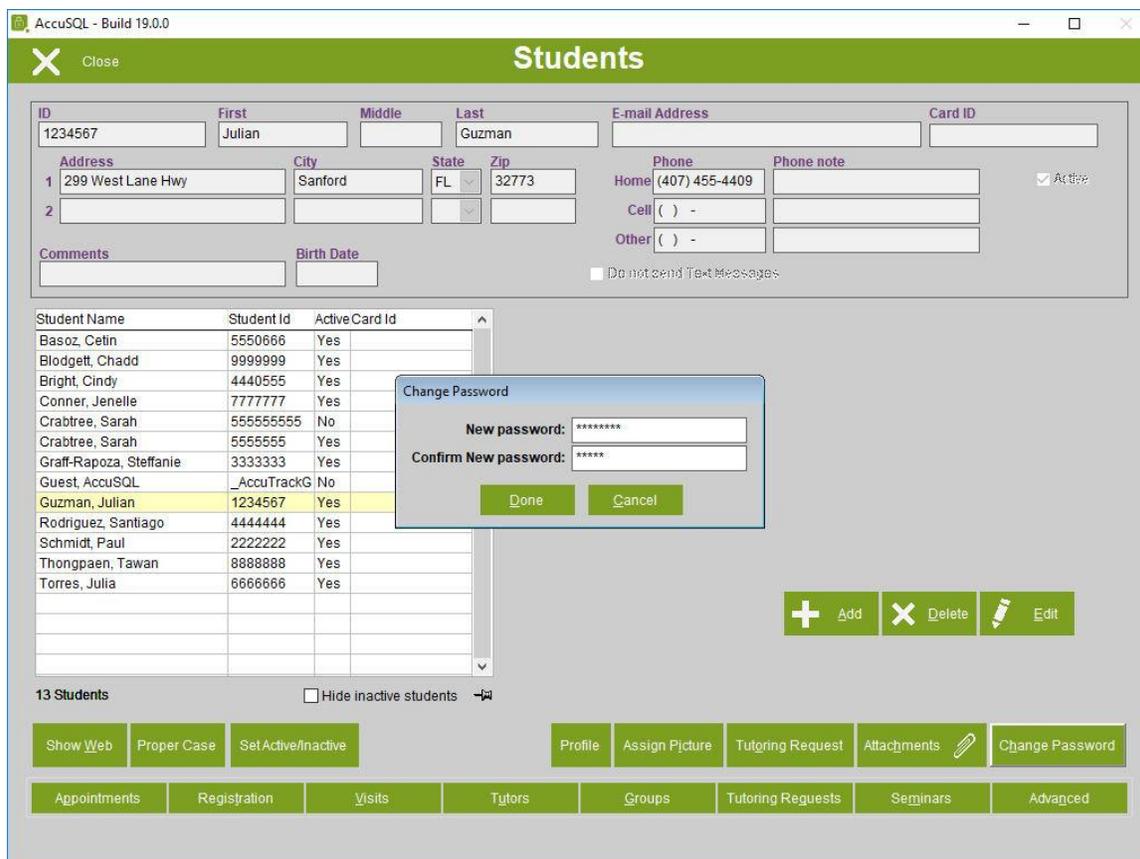
View: Click to view the attachment in the default program associated with it.

Print: Click to print the document. Warning: when you click Print, it will print the document immediately.

CHANGE PASSWORD

Click this button to change the current password for the selected student. Passwords are used when students log into the Student Pad, use Web Gateway to make appointments, or use sign into the Computer Lab Plugin and you have Add-ons >> Setup >> Computer Lab Options set to require student password at sign-in. After you click Change Password, a screen will open where you can enter the new

password and then enter it again to confirm and click Done. The passwords are case-sensitive. If you do not want to change the password, you can click the Cancel button.



Tip: If you want to set all of the student passwords to either the same as their IDs, or to their lower case last name, you can do so in the System Access >> Reset Student Passwords screen. You can also import password for students as part of the Student Information import. Passwords are required for students to be able to access the Student Pad from the main AccuSQL/AccuTrack sign in screen, to login to Web Gateway MVC to make an online appointment, and can optionally be used for the Computer Lab plugin sign in screen.

USING THE STUDENTS CENTRAL TOOLBAR



The bottom of the Modify Student screen has a toolbar that provides detailed information on the selected student. Start by selecting the student from the Students list box, and then click on one of the available buttons:

Appointments: Shows the scheduled appointments for the selected student (current semester).

Registration: Shows the activities (classes) to which the selected student is registered.

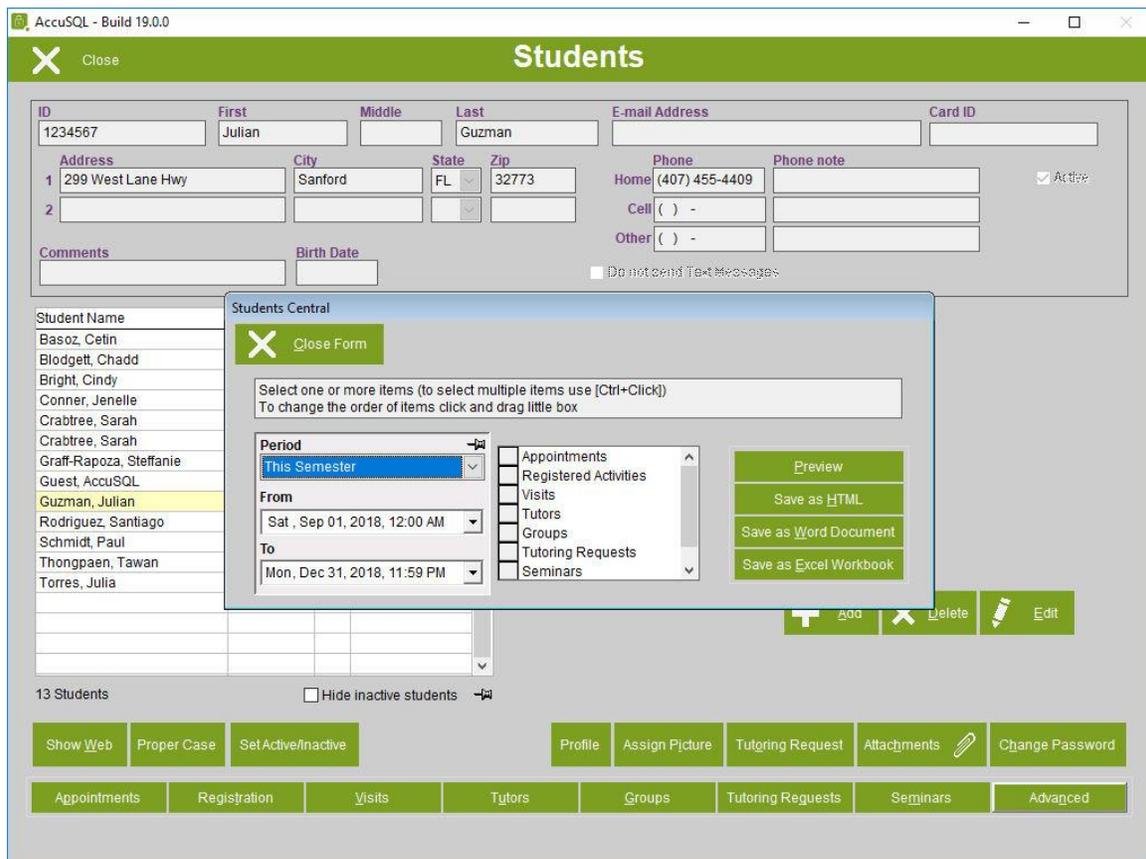
Visits: Shows the visits for the selected student (current semester).

Tutors: Shows the tutors that helped the student this semester.

Groups: Shows the student groups of which the student is a member.

Tutoring Requests: Shows the tutoring requests the selected student made this semester.

Advanced: Provides you with more control on the reports, including changing the reporting period and exporting the report to an html form, a Word document, or an Excel sheet.

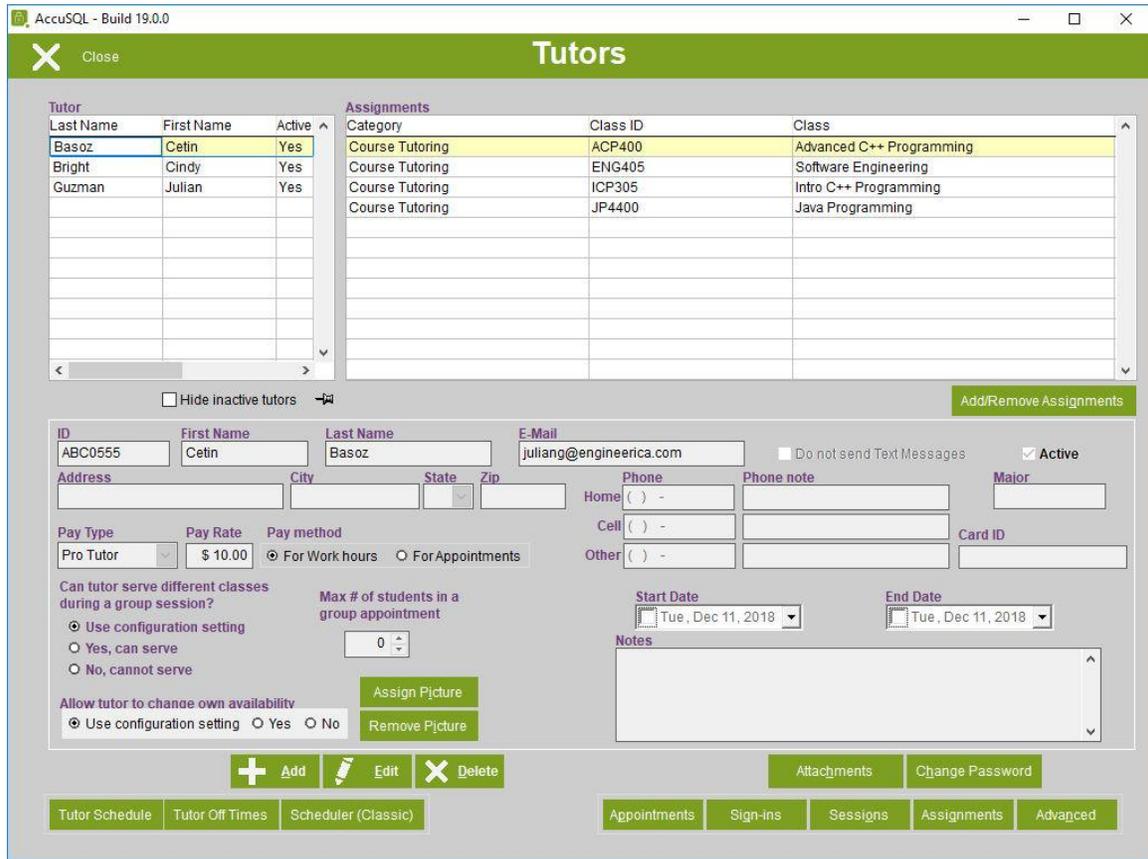


TUTORS

Module: Tutor Setup

Purpose: Enter and modify tutors.

Access: From System Administration, click on **Users >> Tutors**.



ADDING A TUTOR

To add a new tutor, Click the Add button and enter his or her ID number and enter the first and last name. You can also enter the phone number, e-mail address, and street address, among other items. The e-mail address will be used if you want to send e-mail notifications of appointments or use other types of email messaging for the tutor. The street address is useful if you want to print address labels for the tutors. The cell phone number will be used if you decide to use text messaging.

PAY RATES

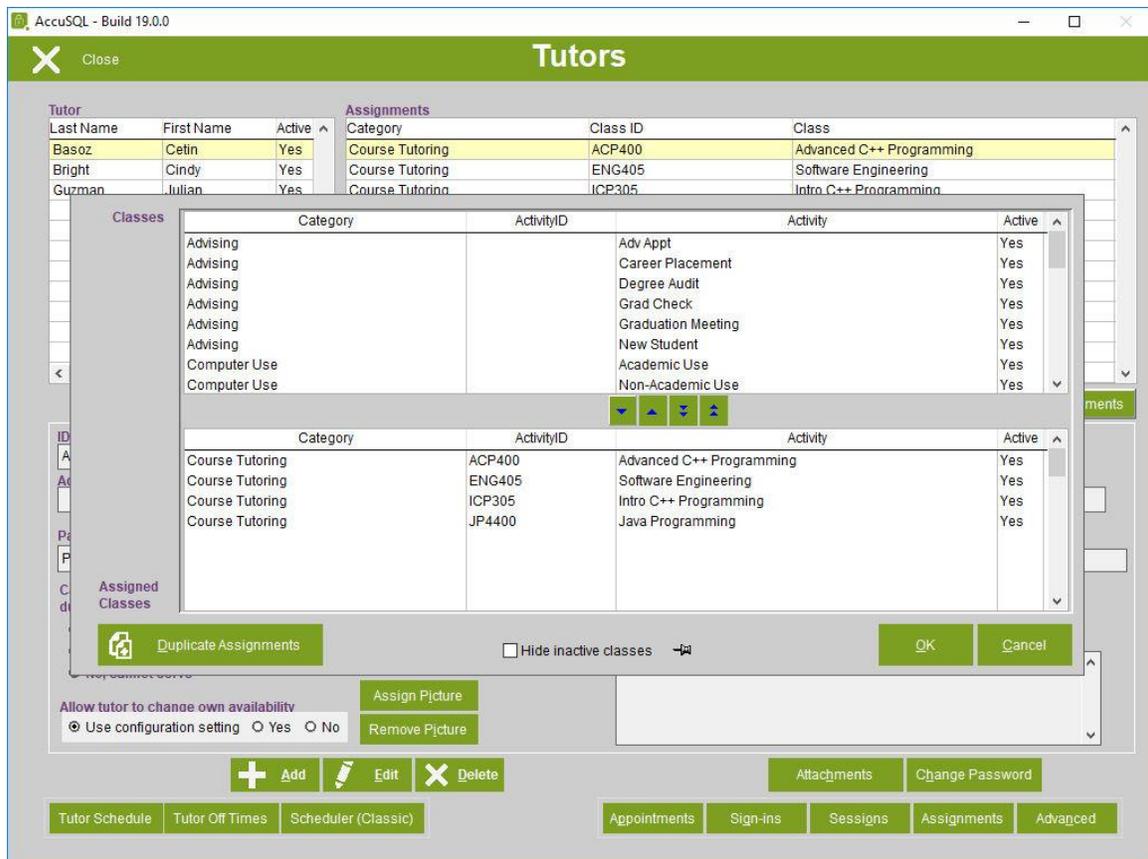
Next, you can define the pay type for this tutor. This is useful if you want AccuSQL/AccuTrack to calculate the pay for the tutor. Select the pay rate by using the drop-down box. The default pay rate will be shown in the "Pay rate" Text box. You can change the default by typing in a different rate if needed.

AccuSQL/AccuTrack will make sure the entered amount is between the minimum and maximum pay rate for this pay type. Next select how the tutor is paid: For Work Hours or For Appointments by using the Pay

Method options group. This definition will determine how AccuSQL/AccuTrack calculates the tutor’s pay.
Note: Tutor pay rates are defined in the **Tutor Visits Tracking >> Pay Rates** screen discussed later in detail.

ADD/REMOVE ASSIGNMENTS

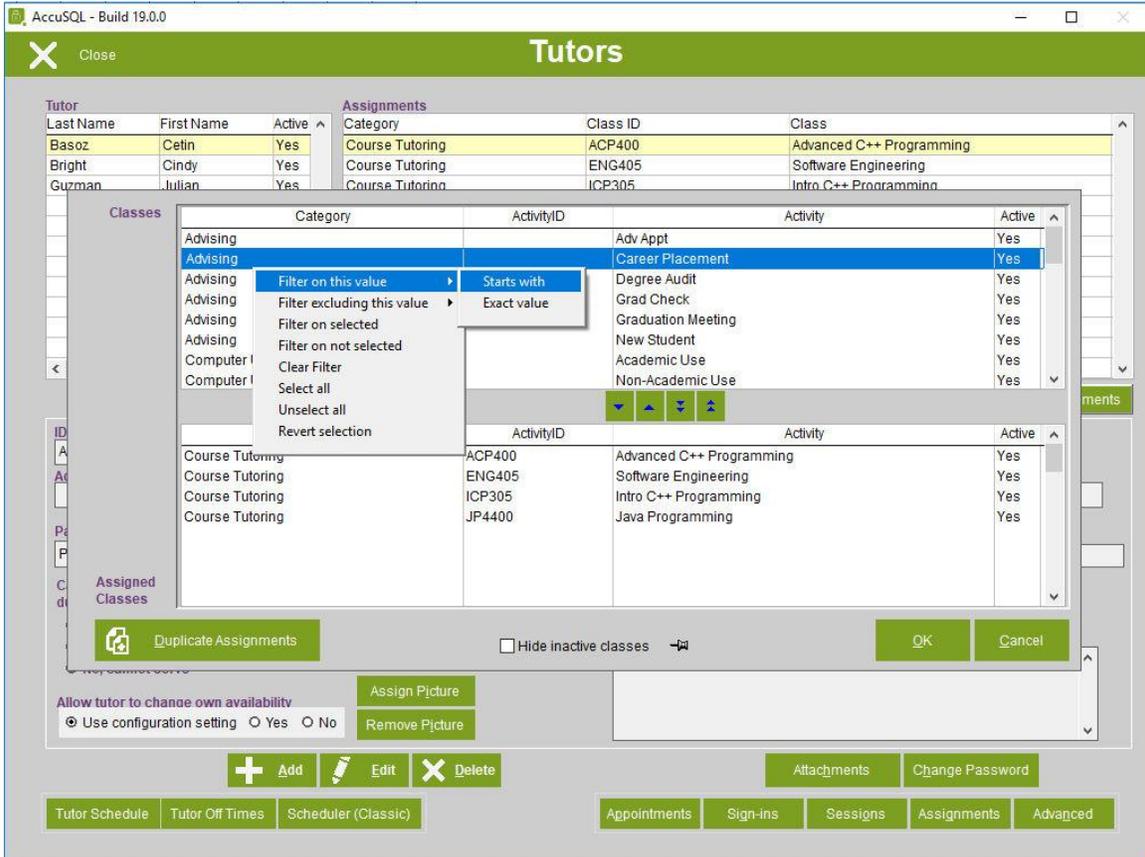
Next, you need to tell AccuSQL/AccuTrack the **activities** or services this tutor provides by clicking the Add/Remove Assignments button and then using the *Selection List Boxes* control. You must assign the activities to the tutors if you want the student to pick a tutor when they sign in to the system. When the student signs into the center (or makes an appointment if you enable that) then the tutors that show up in the Tutor Selection pick list are the tutors who have the activity the student selected assigned to them. Also, if you plan to use appointment scheduling, then you must setup the tutor activity assignments as well as create a Tutor Schedule (discussed later).



The list box at the top of the screen shows the available activities as you entered them (or imported them) in the Activities screen. The list box on the bottom shows the activities associated with the selected tutor. To select an activity, double click on it or use the *Selection List Boxes* buttons. When you are done selecting activities, click on "OK" to add them for the selected tutor. Tutor activity assignments determine, along with the tutors’ schedule, if the tutor will show up in the pick list when a student signs in and picks that activity. So if a student selects English Composition 1, for example, the tutors that have English Composition 1 as an activity assignment and also have a schedule indicating they are working will show up in the pick list when a student signs in or schedules an appointment.

Tip: click in the grid for a column you want to sort on and then begin typing to zoom in on that value. After you have the value you want, right click on the grid to filter on that value, among other options. For example, in the following screen the Category Math Classes has been typed.

By right clicking in the grid now, you can filter on values that have a Category of Math Classes:



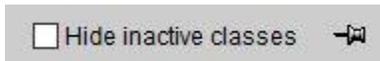
The list would then only contain activities that are assigned the Tutoring category. You can then click the first value and then hold the Shift key on the keyboard and select the last value and then click the down arrow to move all of those activities to the Assigned Activities portion of the screen.

Tip: If you want the student to pick a tutor after they choose an activity, you would select the Show Tutor Selection at sign-in screen option in Sign-in Setup >> Setup >> Tutor Selection Screen Options.

HIDE INACTIVE ACTIVITIES

If you have activities that are not active - as determined by your “selected” options for the current Semester, mentioned in detail later -, you can hide and pin the active view grid to show inactive activities or not.

When the pin is like this, it is in an unpinned state:

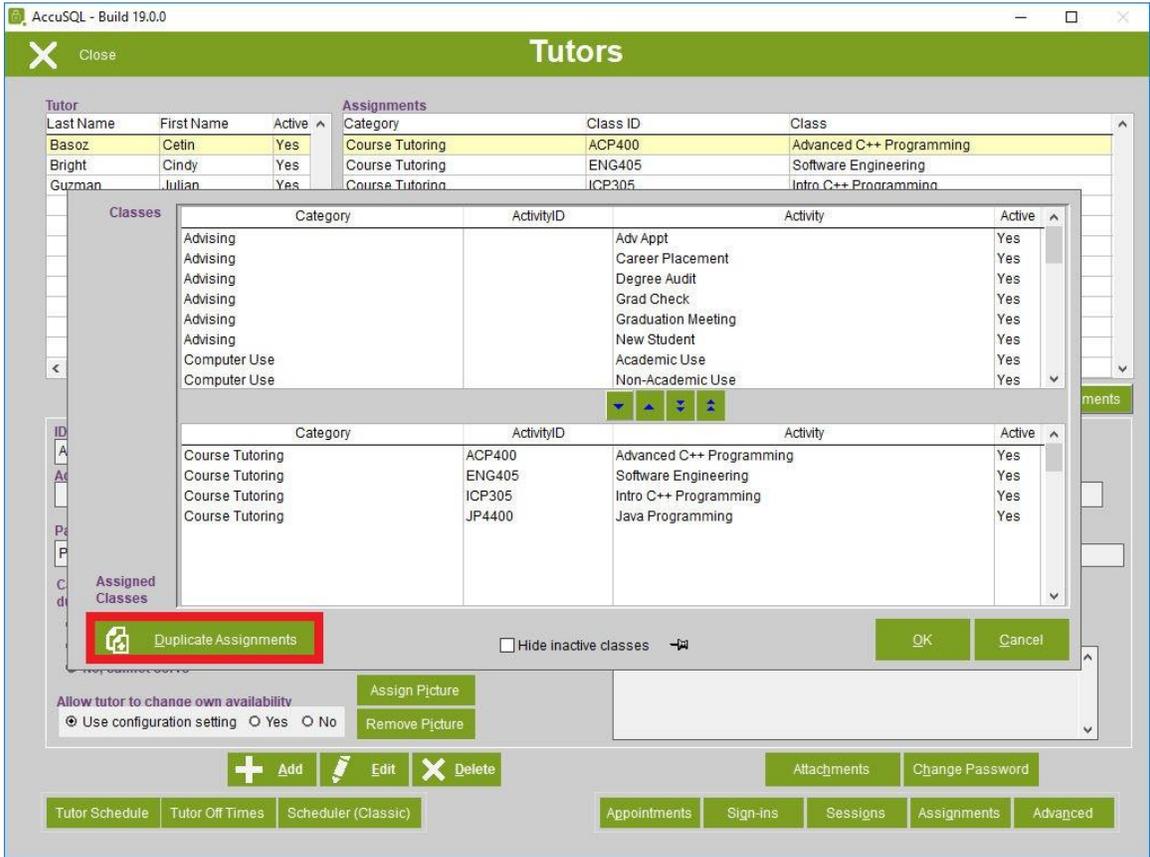


To hide inactive activities, click the checkbox. If you want to pin to always hiding inactive activities, click the checkbox and the click the pin. It will then display in a pinned state.

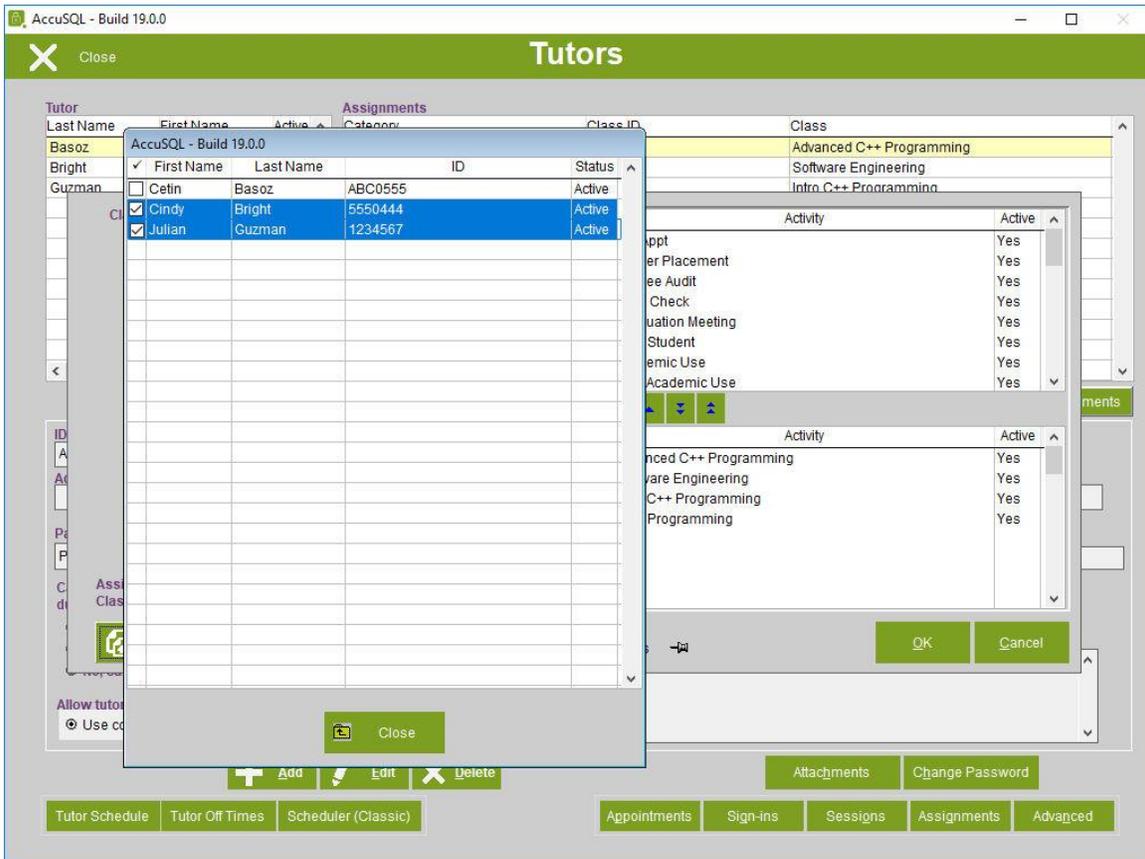


DUPLICATING ACTIVITY ASSIGNMENTS

Once you have assigned the activities to a tutor, then you can duplicate those assignments to one or more other tutors automatically by clicking the Duplicate Assignments button. To duplicate assignments, click on the tutor whose assignments you would like to duplicate and then click the Add/Remove Assignments button.

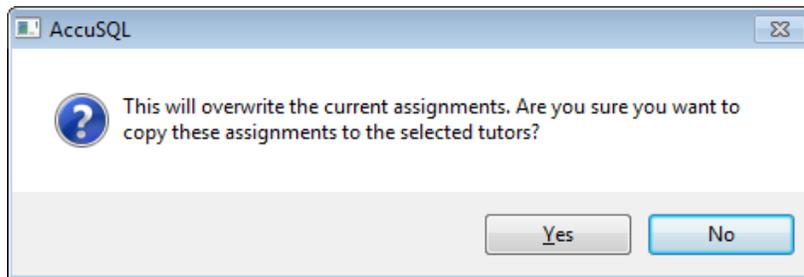


Click the Duplicate Assignments button to open a list of tutors. Click the tutors you want to duplicate the schedule to and then click the Close button:



The system will check to make sure you are not creating orphaned appointments by duplicating the assignments. If appointments will be orphaned, the assignments will not be copied for the tutor or tutors that would cause that condition.

A confirmation message will then appear where you can confirm that you want to duplicate the assignments. Click Yes to complete the action or No to cancel it.



You can select a tutor to whom you duplicated the assignment to see the results.

EDITING A TUTOR

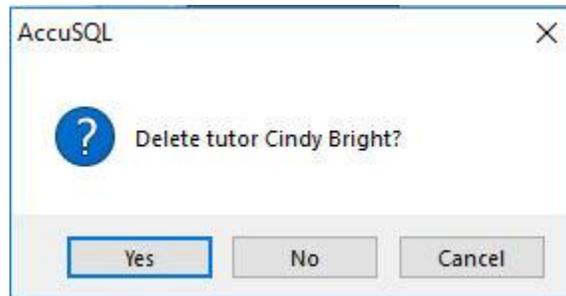
To edit a tutor record, double click on the tutor’s name in the tutor list box on the left side of the screen. When you are done editing, click on “**Save**” to keep the changes or on “**Cancel**” to void them.

MAKING A TUTOR INACTIVE

Tutors you enter in the Tutors screen will show up in the *Tutor selection* screen during student sign-in and in the scheduling appointments screens. If you no longer wish for a tutor to appear in these screens, you can make him or her “inactive”. To do this, edit the record by double clicking on the name in the Tutor list box, then click on the “Active” check box to clear it. Click on “Save” to keep the changes. You will notice “No” appearing in the *Active* column for this tutor.

DELETING A TUTOR

To delete a tutor, select her name in the Tutor list box by clicking on it and click on “Delete”. If this tutor does not have any other related records, you will see this message:



Answer “Yes” to proceed.



Warning: Be extremely careful about deleting ANY information. If you delete data, you will lose all associated data with that deleted record. It is highly recommended you instead inactivate the record.

ENTERING TUTOR SCHEDULES

Module: Users >>Tutors

Purpose: Enter and modify tutor’s schedule.

Access: From Tutors screen.

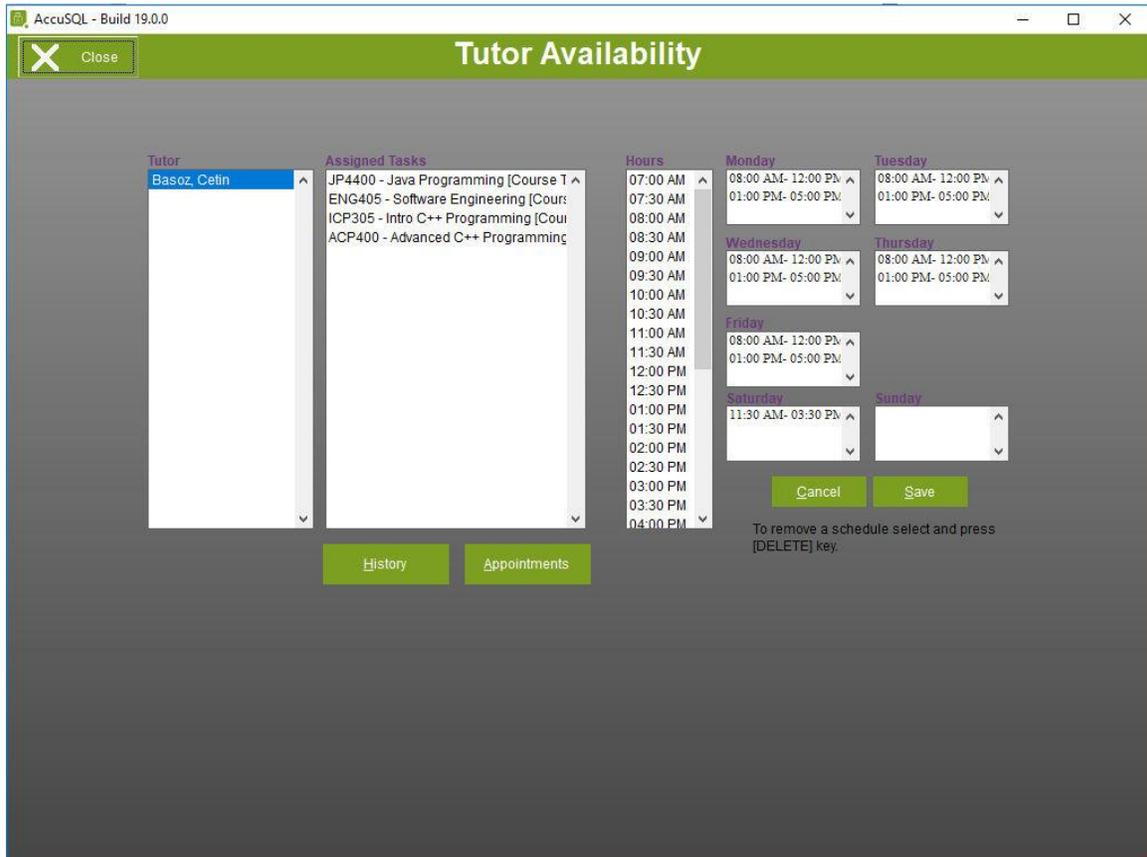


Before using the appointments scheduling module, you will need to tell AccuSQL/AccuTrack the work hours of your tutors. You can also create regular (semester) schedules, custom schedules and off times for tutors. These options are discussed in more detail in the sections that follow.

SCHEDULER (CLASSIC)

Use Scheduler (Classic) to drag the tutor schedules into the days of the week indicating when tutors will be available for appointments. The Scheduler (Classic) is used to creating recurring schedules through the end of the current semester. If you need to create custom schedules that change from week to week or month to month, you can define the semester schedule here and then create custom schedules over top of the semester schedule using the Tutor Schedule Option.

Note: The schedule you create using Scheduler (Classic) is the same as the Regular schedule you define using the Tutor Schedule option. Think of it as the “now until the end of the semester” schedule. If you update a schedule using Scheduler (Classic), that schedule will also be updated for Regular schedule in the Tutor Schedule screen and vice-versa. Custom schedules can only be defined using the Tutor Schedule screen. Custom schedules are handy if your tutors work different hours from week to week.



On the left of the screen you will see the tutor you are currently working with. The list box next to it shows the activities assigned to the selected tutor. To the right of this list box you will see the "Hours" list box. You can use this box to select the work hours for the tutor. On the right side of the screen you will see seven small boxes representing the days of the week. The selected tutor’s work hours are dragged into these boxes.

Entering Tutor Schedule

To enter the schedule for a tutor, follow these steps:

1. Select the time period of the first shift in the Hours list box. For example, if the tutor is scheduled to work 8:00 AM to 12:00 PM, click on the 8:00AM time with the mouse, and press the *Shift* key and hold it down and then click on the 12:00 PM time. This will highlight all of the time values between 8AM and 12PM.
2. Drag the highlighted time to the appropriate day list box. For example, If the selected tutor works 8 AM to 12 PM Mondays, Wednesdays and Fridays, click on one of the highlighted times above once with the mouse and hold the left mouse button down and move the mouse pointer to the Monday list box and let go of the mouse button. You will see the hours 8:00 AM to 12:00 PM appear in the Monday box. Next drag and drop the same value to the Wednesday and to the Friday boxes.
3. Enter the rest of the times following steps 2 and 3 above. For example, if the tutor works from 1:00PM to 5:00 PM on Monday, Wednesday, and Friday, follow the steps to add this time period to the appropriate day boxes.
4. Click on "Save" to keep the changes.

Adjusting Tutor Schedule

You can add hours to an entered schedule by simply dragging the new time and dropping it in the appropriate day box. To remove a time period from one of the Day list boxes highlight the period then press the **Delete** key on your keyboard. Click on "Save" to keep the changes.

You can use the **History** and **Appointment** buttons at the bottom of the screen to see the past sign-ins and scheduled appointments by students for the selected tutor.

Allow Tutor to change own Availability

New for version 2017, you can enable tutors access to create their own custom schedules using either AccuSQL or Web Gateway MVC. If enabled, tutors can use the Schedule button from the Tutor Pad in AccuSQL to set their schedules on a weekly basis or in Web Gateway MVC, they would use the Custom Weekly Availability option to set their weekly schedules. Any schedules created by the tutors using this method will be added as automatically as Custom schedules in the Tutor Schedule screen.

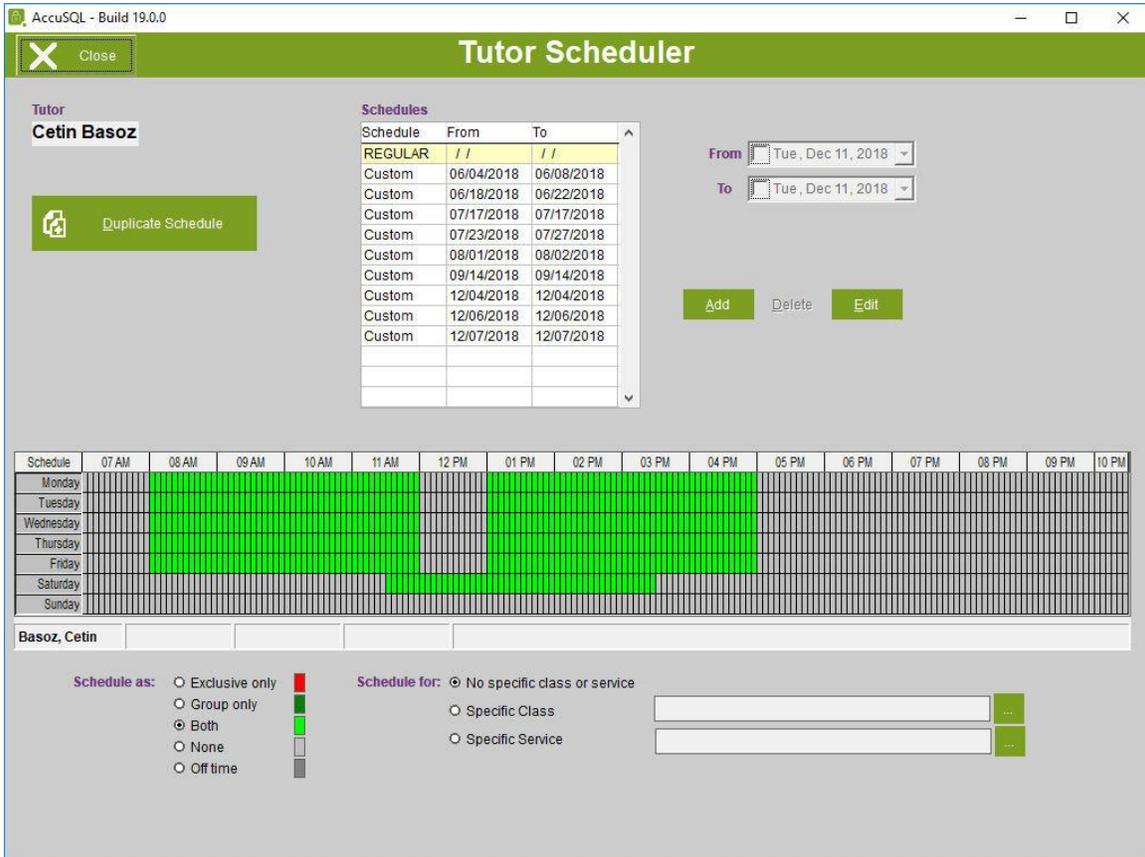
There are three options for determining if tutors can set their own custom schedules or not. Use configuration settings will apply the rules for the tutor as determined by the Appointments Options >> Allow tutor to change own availability X days in advance settings. Yes means the selected tutor can add his/her own schedule regardless of the Appointments Options >> Allow tutor to change own availability X days in advance settings. No means the selected tutor cannot add his/her own schedule regardless of the Appointments Options >> Allow tutor to change own availability X days in advance settings.

TUTOR SCHEDULE SCREEN

The Tutor Schedule screen is used if you would like to define a regular (semester) and/or a custom schedule for the tutor. For tutors to show in in the students pick list when they sign in to AccuTrack/AccuSQL or when they schedule an appointment, the tutors must typically have two items: activity assignments and schedule

 **Note:** If you prefer to not use tutor schedules at all, you can show all tutors whether or not they have a schedule in the Sign-in Setup >> Setup >> Tutor Selection Screen Options by selecting the “Tutor list includes all tutors assigned to an activity regardless of their availability” checkbox. In this case, when a student selects a particular activity to sign into, all tutors that have that activity assigned to them will show up in the pick list, whether or not they have a tutor schedule. Remember, you must use tutor schedules if you intend to use appointment scheduling.

After you select a tutor in the Tutors, screen, click the Tutor Schedule button to open the screen where you can enter the tutor’s availability using this option.



Tutor Scheduler

Tutor: **Cetin Basoz**

Schedules

Schedule	From	To
REGULAR	//	//
Custom	06/04/2018	06/08/2018
Custom	06/18/2018	06/22/2018
Custom	07/17/2018	07/17/2018
Custom	07/23/2018	07/27/2018
Custom	08/01/2018	08/02/2018
Custom	09/14/2018	09/14/2018
Custom	12/04/2018	12/04/2018
Custom	12/06/2018	12/06/2018
Custom	12/07/2018	12/07/2018

From: Tue, Dec 11, 2018
To: Tue, Dec 11, 2018

Add Delete Edit

Schedule	07 AM	08 AM	09 AM	10 AM	11 AM	12 PM	01 PM	02 PM	03 PM	04 PM	05 PM	06 PM	07 PM	08 PM	09 PM	10 PM
Monday																
Tuesday																
Wednesday																
Thursday																
Friday																
Saturday																
Sunday																

Basoz, Cetin

Schedule as: Exclusive only Group only Both None Off time

Schedule for: No specific class or service Specific Class Specific Service

To enter a Regular (semester) schedule for the tutor, perform the following steps:

- 1) Make sure you have REGULAR selected in the Schedules grid.
- 2) Click your mouse button in the bottom day and time grid to drag the schedule for the tutor into the grid. You SHOULD NOT click Add first, just directly drag in the grid (Add is used to add a custom schedule only).
- 3) Click Save.
- 4) In the following example, the tutor has a schedule for 8AM to 12PM, then an hour off then from 1PM to 5PM.

AccuSQL - Build 19.0.0

Tutor Scheduler

Tutor
Cetin Basoz

Duplicate Schedule

Schedule	From	To
REGULAR	//	//
Custom	06/04/2018	06/08/2018
Custom	06/18/2018	06/22/2018
Custom	07/17/2018	07/17/2018
Custom	07/23/2018	07/27/2018
Custom	08/01/2018	08/02/2018
Custom	09/14/2018	09/14/2018
Custom	12/04/2018	12/04/2018
Custom	12/06/2018	12/06/2018
Custom	12/07/2018	12/07/2018

From: Tue, Dec 11, 2018
To: Tue, Dec 11, 2018

Schedule	07 AM	08 AM	09 AM	10 AM	11 AM	12 PM	01 PM	02 PM	03 PM	04 PM	05 PM	06 PM	07 PM	08 PM	09 PM	10 PM
Monday																
Tuesday																
Wednesday																
Thursday																
Friday																
Saturday																
Sunday																

Basoz, Cetin [Tuesday] - [06:00 PM]

Schedule as:

- Exclusive only
- Group only
- Both
- None
- Off time

Schedule for:

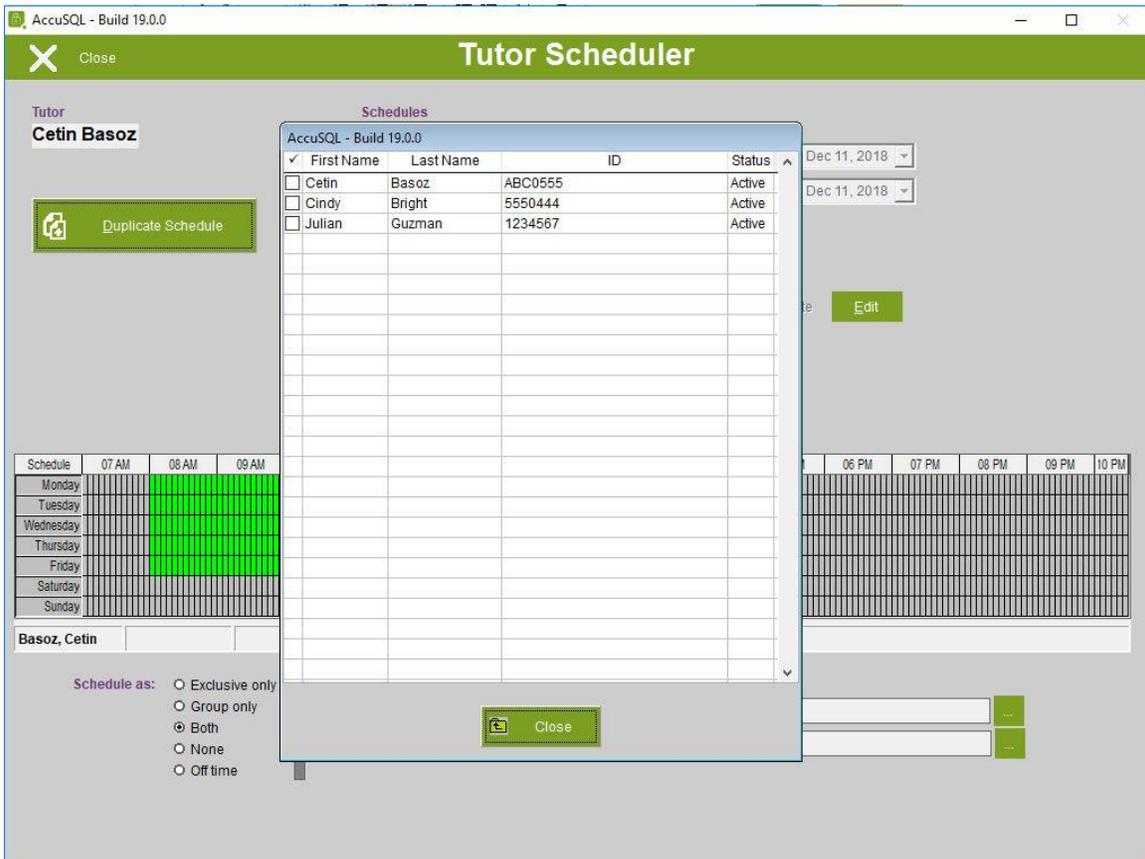
- No specific class or service
- Specific Class
- Specific Service

DUPLICATING A SCHEDULE

Once you have created a REGULAR schedule for a tutor, then you can duplicate that schedule to one or more tutors automatically by clicking the Duplicate Schedule button. To duplicate a schedule, click on the tutor whose schedule you would like to duplicate and then click the Tutor Schedule button.

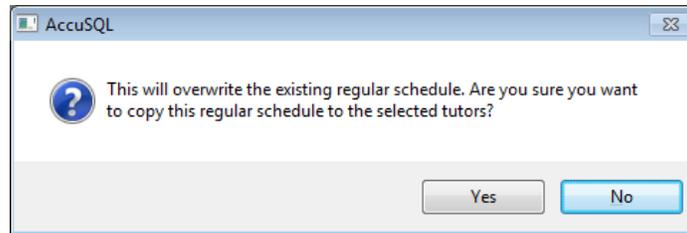
Note: Only REGULAR schedules can be duplicated. Custom schedules cannot be duplicated.

Click the Duplicate Schedule button to open a list of tutors. Click the tutors you want to duplicate the REGULAR schedule to and then click the Close button:



The system will check to make sure you are not creating orphaned appointments by duplicating the schedule. If appointments will be orphaned, the schedule will not be copied for the tutor or tutors that would cause that condition.

A confirmation message will then appear where you can confirm that you want to duplicate the schedule. Click Yes to complete the action or No to cancel it.

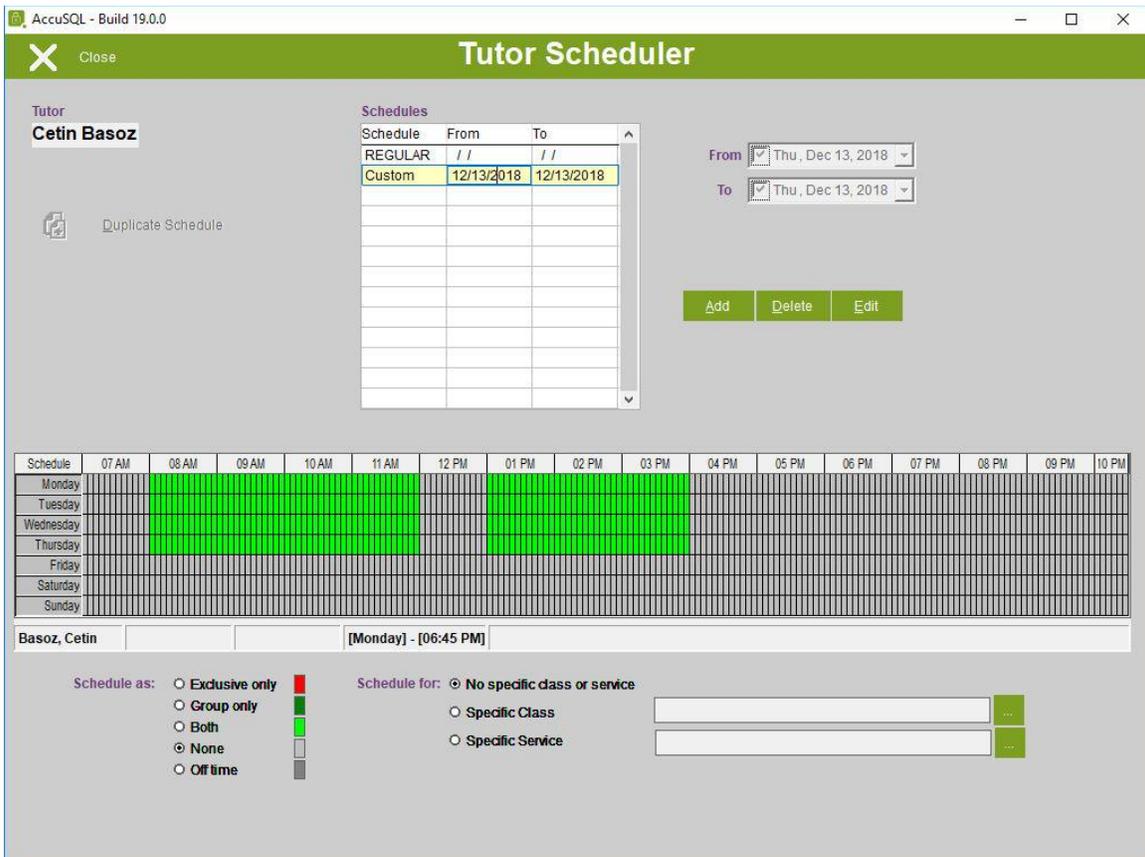


You can select a tutor to whom you duplicated the schedule and then click the Tutor Schedule to see the results.

ADDING A CUSTOM SCHEDULE

The Default option in the Schedules grid shows the REGULAR “semester” schedule (if any) for the tutor as defined in the Tutor Schedule screen.

To add a custom schedule for a specific date range, click the Add button. In the From and To boxes click the start and end date for this schedule (or can be for a week, a month, or whatever range works for you) and then you will drag in the grid for when the tutor works for that date range then click Save. Look at the display below the grid to see the time you are dragging for. Now click Add again and go through the same process for the next From and To period of time (if necessary) until you have built the schedule the way you want. In the following example, the tutor has a REGULAR schedule from 8AM to 5:00PM. If however, you click on the Custom schedule in the grid, the tutor works also from 8AM to 12PM and 1PM to 4PM from December 13th.



Green in the grid indicates you are scheduling the tutor for both drop-in only (one on one) and group appointments. You can choose the Schedule as radio buttons on the bottom left of the screen to create the time as something different than that. In the Schedule for: area you can specify the tutor schedule for a specific activity and/or service. That means the student will only see the tutor as available if they select that specific activity and/or service and 1) the tutor has that activity assignment and 2) the tutor has that specific activity scheduled here. In the following example a tutor has a schedule from 8AM to 12PM then 1PM to 4PM. He is only available for both exclusive and group tutoring for Java Programming since a specific activity was selected for that Custom schedule.

The screenshot shows the 'Tutor Scheduler' window for 'Cetin Basoz'. It includes a 'Schedules' table, date pickers for 'From' and 'To', and a grid showing availability from 07 AM to 10 PM. The grid shows green blocks for Monday through Friday from 08 AM to 12 PM and 01 PM to 04 PM. Below the grid are radio buttons for 'Schedule as' (Exclusive only, Group only, Both, None, Off time) and 'Schedule for' (No specific class or service, Specific Class, Specific Service). The 'Specific Class' is set to 'JP4400 Java Programming [Course Tutoring]'.

Schedule	From	To
REGULAR	//	//
Custom	12/13/2018	12/13/2018
Custom	12/14/2018	12/14/2018

Schedule	07 AM	08 AM	09 AM	10 AM	11 AM	12 PM	01 PM	02 PM	03 PM	04 PM	05 PM	06 PM	07 PM	08 PM	09 PM	10 PM
Monday		Green	Green	Green	Green	Green		Green	Green	Green						
Tuesday		Green	Green	Green	Green	Green		Green	Green	Green						
Wednesday		Green	Green	Green	Green	Green		Green	Green	Green						
Thursday		Green	Green	Green	Green	Green		Green	Green	Green						
Friday		Green	Green	Green	Green	Green		Green	Green	Green						
Saturday																
Sunday																

Schedule as: Exclusive only Group only Both None Off time

Schedule for: No specific class or service Specific Class Specific Service

JP4400 Java Programming [Course Tutoring]

And finally, the same tutor is available from 6PM to 8PM on December 19, but only for Exclusive appointments for Java Programming.

The screenshot shows the 'Tutor Scheduler' window for 'Cetin Basoz'. It features a 'Schedules' table, date pickers for 'From' and 'To', and a grid view of the week. The grid shows appointments for Monday, Tuesday, Wednesday, and Thursday, with a specific appointment highlighted for Monday from 05:25 PM to 06:00 PM. Below the grid, there are configuration options for 'Schedule as' (Exclusive only, Group only, Both, None, Off time) and 'Schedule for' (No specific class or service, Specific Class, Specific Service). The 'Specific Class' dropdown is set to 'JP4400 Java Programming [Course Tutoring]'.

Schedule	From	To
REGULAR	//	//
Custom	12/13/2018	12/13/2018
Custom	12/14/2018	12/14/2018
Custom	12/19/2018	12/19/2018

Schedule	07 AM	08 AM	09 AM	10 AM	11 AM	12 PM	01 PM	02 PM	03 PM	04 PM	05 PM	06 PM	07 PM	08 PM	09 PM	10 PM
Monday																
Tuesday																
Wednesday																
Thursday																
Friday																
Saturday																
Sunday																

Basoz, Cetin [Monday] - [05:25 PM]

Schedule as: Exclusive only Group only Both None Off time

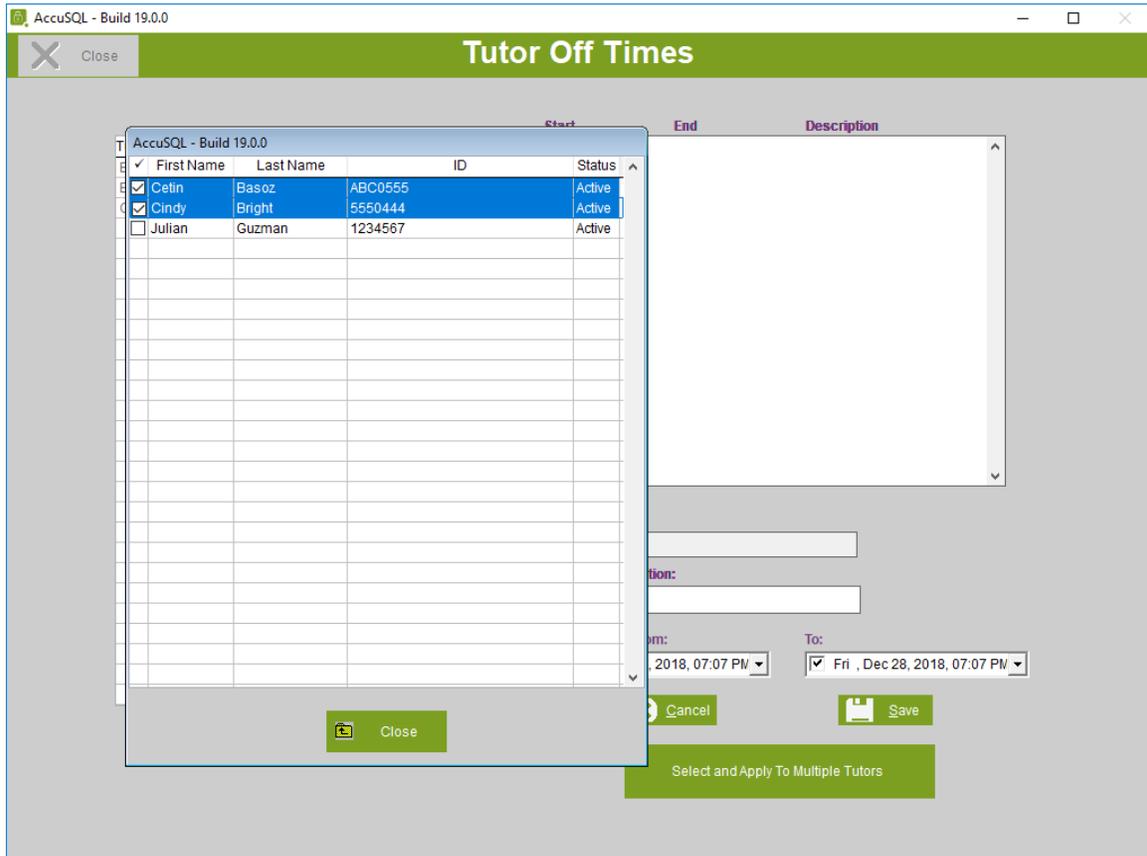
Schedule for: No specific class or service Specific Class Specific Service

JP4400 Java Programming [Course Tutoring]

Tip: If you move your mouse over a specific block of time, you can see the particular activity or service you have specified for the tutor in the display area below the data grid. You can also use the area below the data grid to know the exact start and end times you are dragging in the grid.

TUTOR OFF-TIMES

This feature allows you to set off-times for Tutors. You can also apply the off-time to multiple tutors if the time applies.



ALLOW TUTOR SCHEDULING USING WEB GATEWAY MVC

Web Gateway MVC is a plugin module for AccuSQL that allows students to schedule appointments, register for seminars/workshops, take surveys, and more all from the convenience of a web browser. New for version 2019 and later, you can now allow tutors to create their own “semester” or custom schedules through Web Gateway. These schedules are then reviewed and approved by AccuSQL admins.

ATTACHMENTS

Use this option to assign external files with the selected tutor record. When you click Attachments, a screen will open where you can click Add to add a new attachment:

Student: By default, it selects the current tutor you have selected in the main Students screen. If you want to select a different tutor, click the ... button to find them.

Phone Number: System populated.

Description: Enter a name for the attachment.

Filename: Click the ... button to navigate to the file you want to attach. After selecting the file click OK.

Note: If it is not a Word document, change the Files of Type drop-down to see all files.

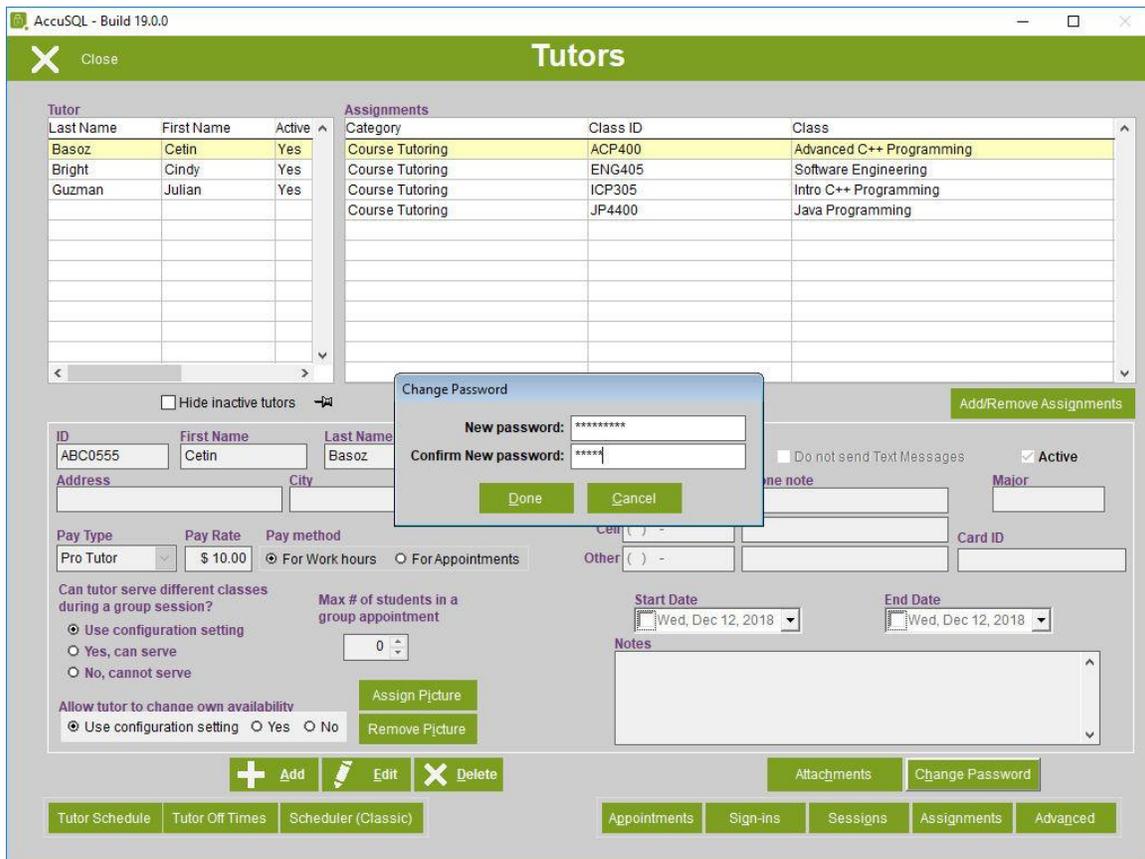
Save: Click to save the attachment link.

View: Click to view the attachment in the default program associated with it.

Print: Click to print the document. Warning: when you click Print, it will print the document immediately.

CHANGE PASSWORD

Click this button to change the current password for the selected tutor. Passwords are used when tutors log into the Tutor Pad, or use Web Gateway to view or cancel appointments. After you click Change Password, a screen will open where you can enter the new password and then enter it again to confirm and click Done. The passwords are case-sensitive. If you do not want to change the password, you can click the Cancel button.



Tip: If you want to set all of the tutor passwords to either the same as their IDs, or to their lower case last name, you can do so in the System Access >> Reset Student Passwords screen. Select the Tutor checkbox only if you want to only reset tutor passwords and not student passwords too.

USING THE TUTOR CENTRAL TOOLBAR

At the bottom of the Tutors screen you will see the Tutor Central Toolbar. This toolbar contains buttons that will provide more information on the selected tutor. This information includes:



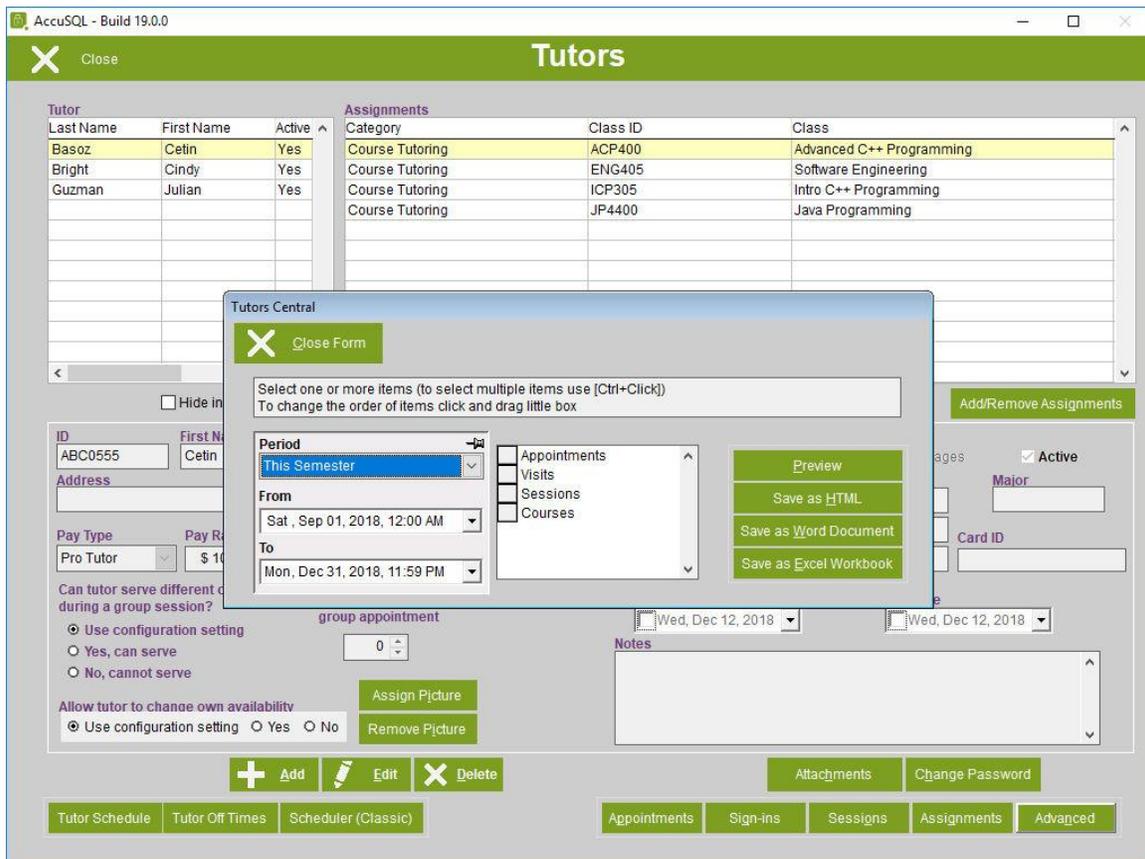
Appointments: Shows this semester’s appointment for the selected tutor.

Sign-ins: Shows this semester’s sign-ins for the selected tutor.

Sessions: Shows the tutoring sessions for the selected tutor during the current semester.

Assignments: Shows the tutoring assignments for the selected tutor during the current semester.

Advanced: Shows a form that allows you more control of the reports on the selected tutor. This includes changing the reporting period (from the default ‘this semester’ period) and the ability to export the report to html format, Word document, or Excel sheet.



INSTRUCTORS

Module: Users >>Instructors

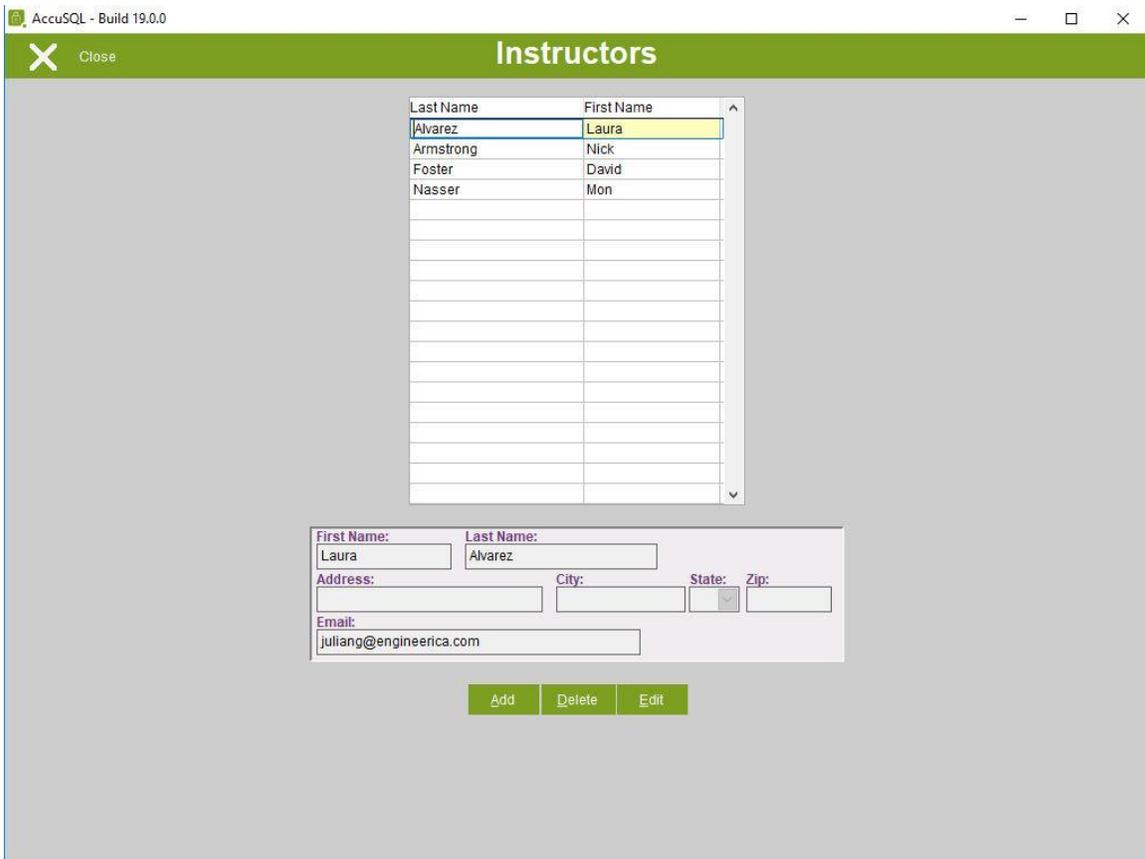
Purpose: Enter activity (course) instructors.

Access: From Users click on **Instructors**.

There are at least five advantages of entering instructors in AccuSQL/AccuTrack:

- 1) To generate a report for each instructor detailing the activity of his or her students. For example, if you have an ESL instructor that gives her students extra credit for attendance at your lab, you can generate a report for that instructor detailing her students' attendance.
- 2) You can schedule reports to go out to all your instructors for the dates and times you specify and for a particular period of time using the Set schedule for instructor's attendance reports screen in the Control Panel >> Activity Screen Options menu.
- 3) To show the instructors for a class in the Activity Selection screen. This will help the students identify their class for selection.
- 4) To print out address labels for instructors
- 5) You can have tutors email their session notes directly to the instructors after they record them.

To enter instructors, click Users >>> Instructors:



The list box in the center of the screen displays the current instructors. To add a new instructor, click Add and type his or her name in the *text boxes*. You can also enter the instructor’s address and email address. Click on the “**Add**” button to complete the entry. The name will move from the text boxes to the list box.

Note:

To edit an instructor, double click on the name in the list box. The data will be copied to the *text boxes* where you can make the changes. Click the “**Save**” button to keep the changes.

To delete a name in the list, first highlight it and, then click on the “**Delete**” button. AccuSQL/AccuTrack will ask you to confirm before proceeding with the deletion.

 **Tip:** If you import your instructors while you are importing your activities (classes) then the Instructors will automatically be added not only to the activity, but also to the Instructors screen. If you plan to send out attendance reports to instructors, they must have a valid email address entered.

SYSTEM ADMINISTRATORS

Use this option to add new system users to AccuSQL/AccuTrack and assign them to Access Groups. This option is discussed in detail in the System Access >> [System Administrators](#) section of this document.

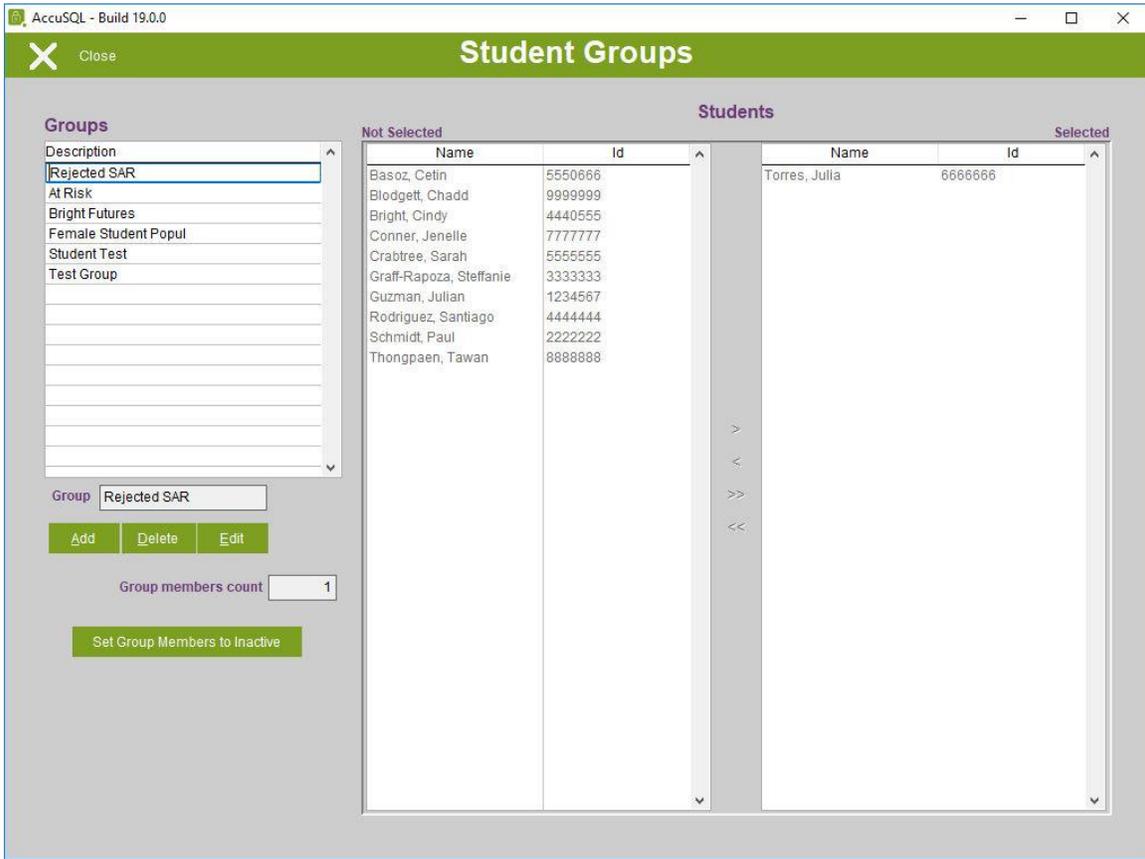
STUDENT GROUPS

Purpose: To create groups of students.

Access: From System Administration, click on Users>>Student Groups.

In this screen you will be able to group students by some kind of classification you can create for your needs. For example, you may have a group of First Year, or At Risk students that you would like to add to a group. The groups you create can be used in several places, perhaps most importantly as a report filter. For example, you could run a Zero Visits report for students in your At Risk group to determine who may be in need of intervention. Student Groups are used in numerous places throughout the software, including:

- Student groups can be used as a report filter in numerous reports.
- You can register student groups to activities.
- You can manually sign in student groups.
- You can message student groups.
- You can present custom surveys to student groups.
- You can limit seminar registrations for specific members of student groups.



You will notice a list of groups on the left. When you select one of the groups, its members are shown in the “Selected” box.

ADDING A STUDENT GROUP

To **add** a new group, click on “**Add**” and enter the group name. Next select the students you want to add to this group using the *Selection List Boxes* control. Click the “**Save**” button to add your entry.

 **Tip:** You can also create a group from an import file using the Import Wizard, via the Reports screen and/or via the Profile Query screen.

EDITING A STUDENT GROUP

To **edit** a group record, first highlight the group by clicking on it. If you don't see the group, use the up and down buttons in the vertical scroll bar to find it. To edit the record, click on the “**Edit**” button. The group's description will be copied to the text boxes. Make your changes there and add or remove group members if needed. Click on the “**Save**” button to keep the changes, or click on the “**Cancel**” button to keep the data as is.

DELETING A STUDENT GROUP

To **delete** a group, first highlight the group, and then click on “**Delete**”. You will see a confirmation message. Click “**Yes**” to delete the group.

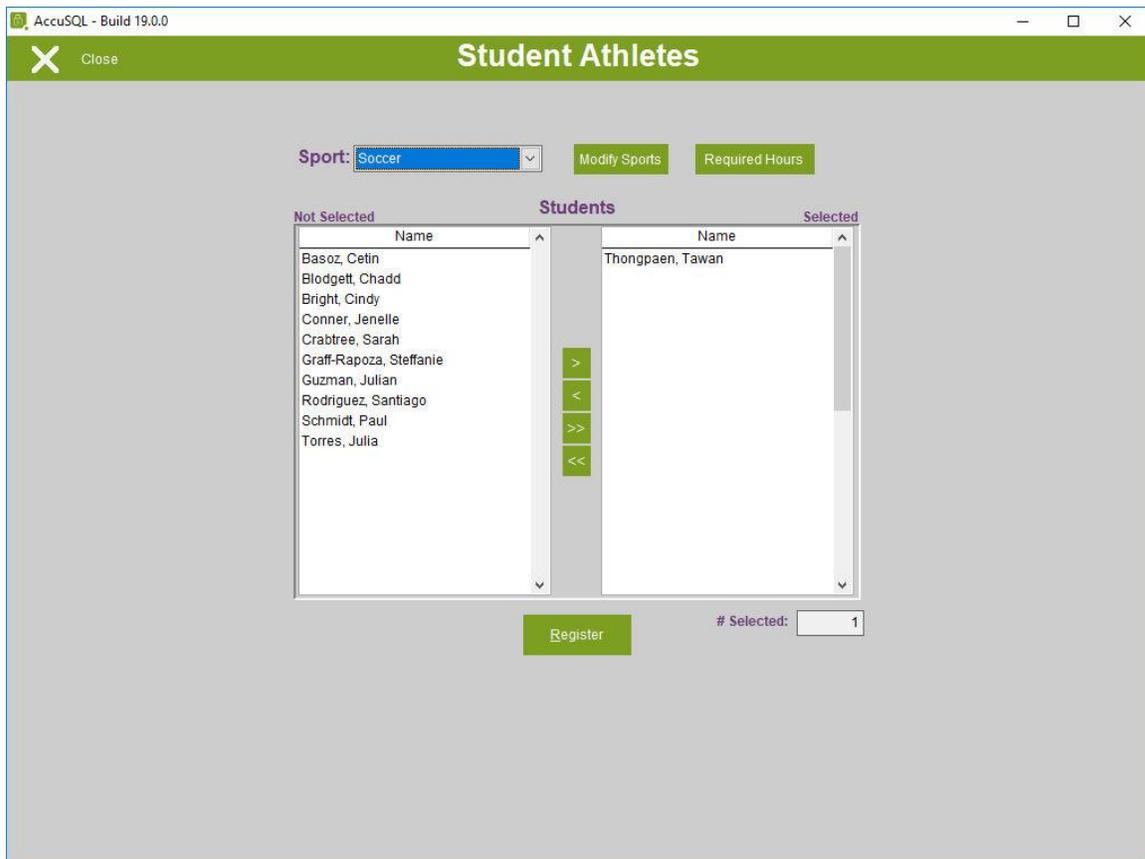
SETTING GROUP MEMBERS TO INACTIVE

If you click the Set Group Members to Inactive button, you can set every member of the Student Group to inactive. Setting to inactive will inactivate the student record for each student in the group. Remember, if students are set to inactive you will still retain all of their sign in and other data, but they will be unable to sign into the system.

STUDENT ATHLETES

Purpose: To add and edit Sports for athlete tracking and required hours.

Access: From System Administration, click on Users>>Student Athletes.

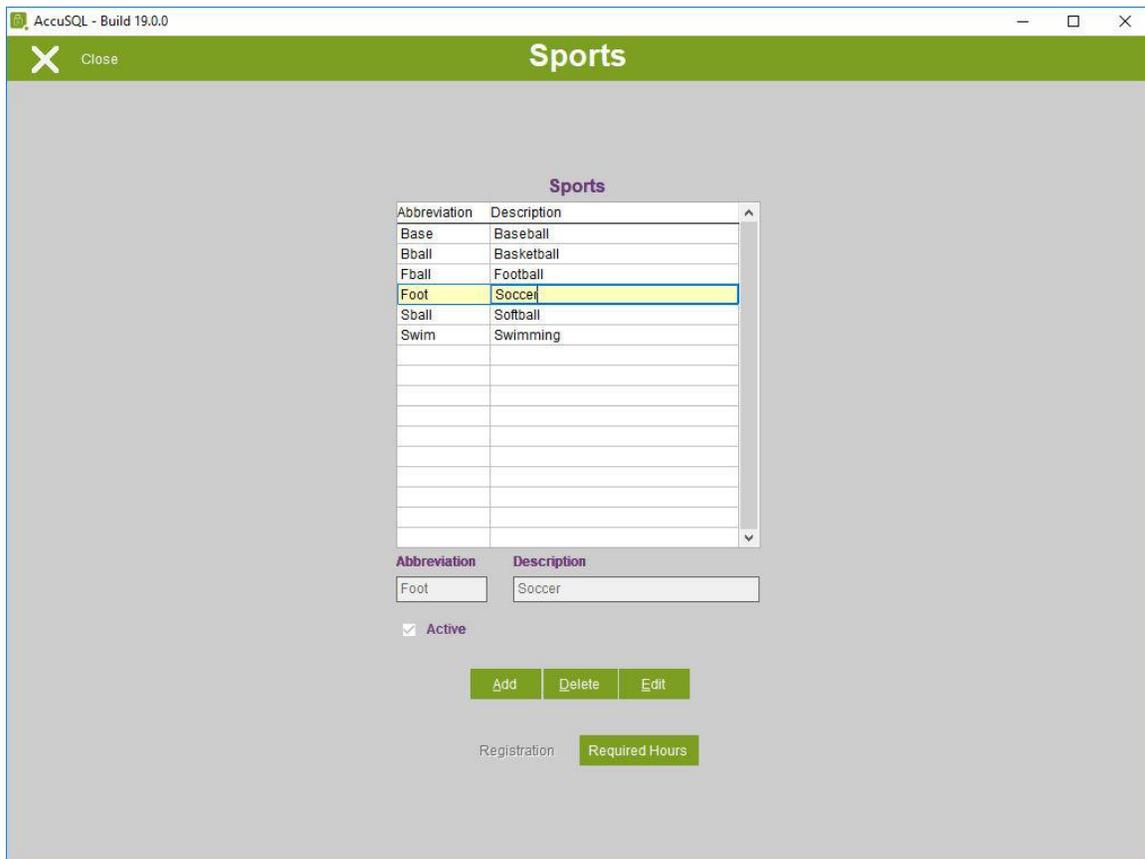


To register a student in a sport, use the *Selection List Boxes* control. Start by selecting the sport from the Sport drop-down box. If you do not have any sports defined, you will need to click Modify Sports to create them (discussed in a minute). Next select the students that are members of the selected sport by moving their names to the "Selected" box on the right. Finally, click on "Register".

To drop a student, simply move the name back to the "Not Selected" box and click on "Register".

ADDING A SPORT

To **add** a new sport, click Modify Sports, fill in the sport's abbreviation, and then the description. Click the "**Save**" button to save your entry.



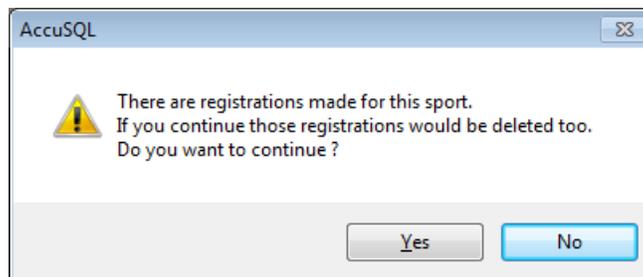
EDITING A SPORT

To **edit** a sport, first highlight the sport by clicking on it. To edit the record, click on the "**Edit**" button. The sport's info will be copied to the text boxes. Make your changes there and then click on the "**Save**" button to keep the changes, or click on the "**Cancel**" button to keep the data as is.

DELETING A SPORT

To **delete** a sport, first highlight the sport, and then click "**Delete**". If this sport does not have any registrations, you will see a confirmation message. If you answer "Yes", the sport will be deleted.

If the sport has students registered to it, AccuSQL/AccuTrack will display a message:



The message above says that this sport has registered students. If you answer "Yes", AccuSQL/AccuTrack will delete the sport's record and all related records.

REQUIRED HOURS SCREEN

Purpose: To add required attendance hours for each student athlete.

Access: From System Administration, click the Student Athletes>> Required Hours button.

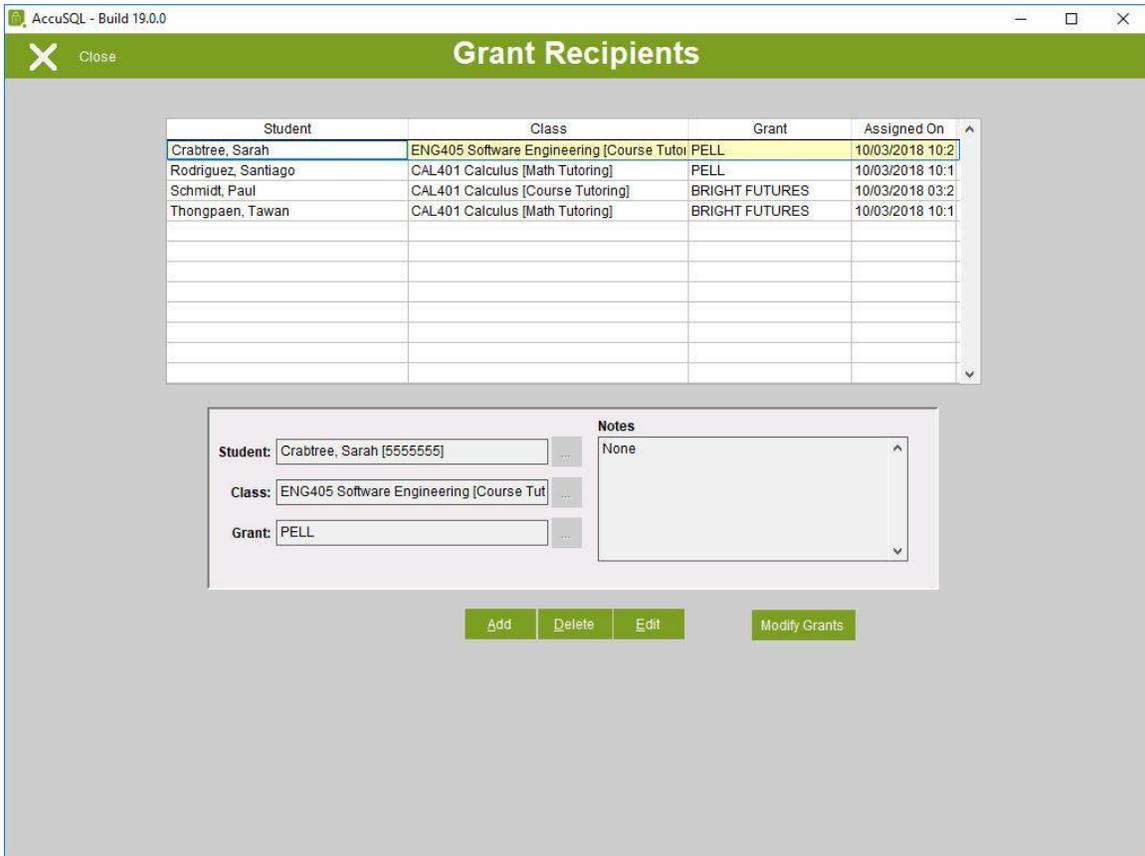
The screenshot shows the 'Required Hours' configuration screen in AccuSQL. At the top, the window title is 'AccuSQL - Build 19.0.0'. The main header is green and contains a close button and the text 'Required Hours'. Below the header, there is a 'Sport:' dropdown menu set to 'Soccer' and a green button labeled 'Current Assignments for this sport'. The main area is divided into three sections: 'Not Selected' (empty), 'Registered Students' (containing a list with 'Thongpaen, Tawan'), and 'Selected' (empty). Between the 'Not Selected' and 'Registered Students' lists are four green arrow buttons (down, up, down, up). To the right, there is a 'Weeks' selection grid with three rows checked: '12/9/2018 - 12/15/2018', '12/16/2018 - 12/22/201', and '12/23/2018 - 12/29/201'. Below the grid is a 'Required Hours' spinner box set to '4' and a green 'Save' button.

Use this screen to indicate the required weekly attendance hours per student athlete. Start by selecting the sport from the Sport drop-down box. Next select one or all athletes registered to this sport by using the *Selection List Boxes* control. Next select the weeks you want to assign hours using the selection grid on the right. Finally, select the number of required hours you want to assign using the spinner box. Click on **“Save”** to record your changes.

GRANTS RECIPIENTS

Purpose: To define the grants for specific students and activities.

Access: From System Administration, click Users>>Grants Recipients.



Use this screen to record your grant’s assignments. To add a new assignment, click on the **"Add"** button. Select the student by using the ... button next to Student. Select the class by using the “...” button next to the “Activity” box. Finally, select the grant by using the “...” button next to the Grant. If you like, you can also add notes in the Notes box. To keep your changes, click the “Save” button. If you do not have any grant types defined yet, click the Modify Grants button (discussed in the next section).

To edit a grant assignment, select it from the list box and then click on the “Edit” button. Make your changes and click on the **"Save"** button.

MODIFY GRANTS

To create new grant types, click the Modify Grants button from the Grants Recipients screen.

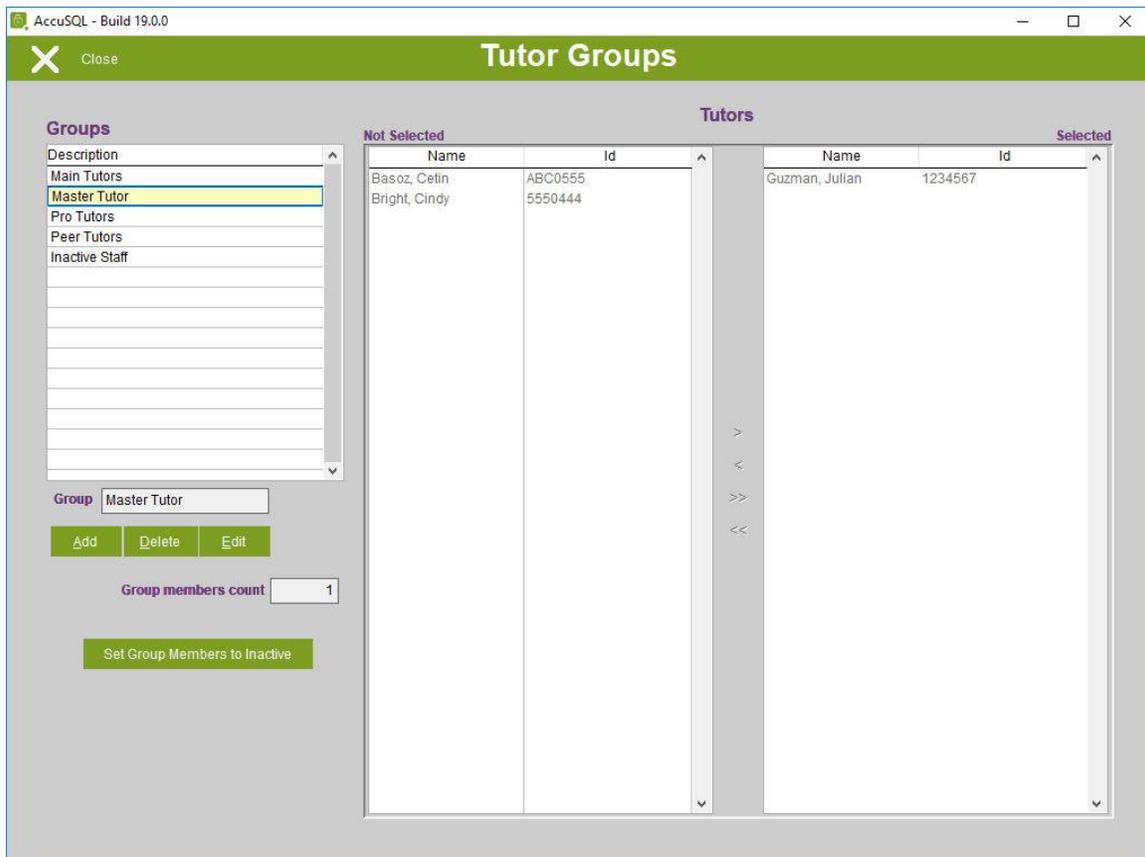
To enter a grant, click on “Add”, type the grant’s name, and enter any comments you like. Click on “Save” to add the grant:

To edit a grant, select it from the list box located at the top of the screen and click Edit. Make your changes and click on "Save".

TUTOR GROUPS

Purpose: Create groups to place your tutors into.

Access: From System Administration, click Users>>Tutor Groups.



The tutor group option allows users to place tutors into different categories. This feature is useful in separating full-time from part-time tutors, social sciences tutors from math tutors, etc. The tutor groups can then be used to filter certain reports, for group messaging, and more.

ADDING A TUTOR GROUP

To **add** a new group, click on “Add” and enter the group name. Next select the tutors you want to add to this group using the *Selection List Boxes* control. Click the “Save” button to add your entry.

Editing a Tutor Group

To **edit** a group record, first highlight the group by clicking on it. To edit the record, click on the "**Edit**" button. The group's description will be copied to the text boxes. Make your changes there and add or remove group members if needed. Click on the "**Save**" button to keep the changes, or click on the "**Revert**" button to keep the data as is.

DELETING A TUTOR GROUP

To **delete** a group, first highlight the group, and then click on "**Delete**". You will see a confirmation message. Click "**Yes**" to delete the group.

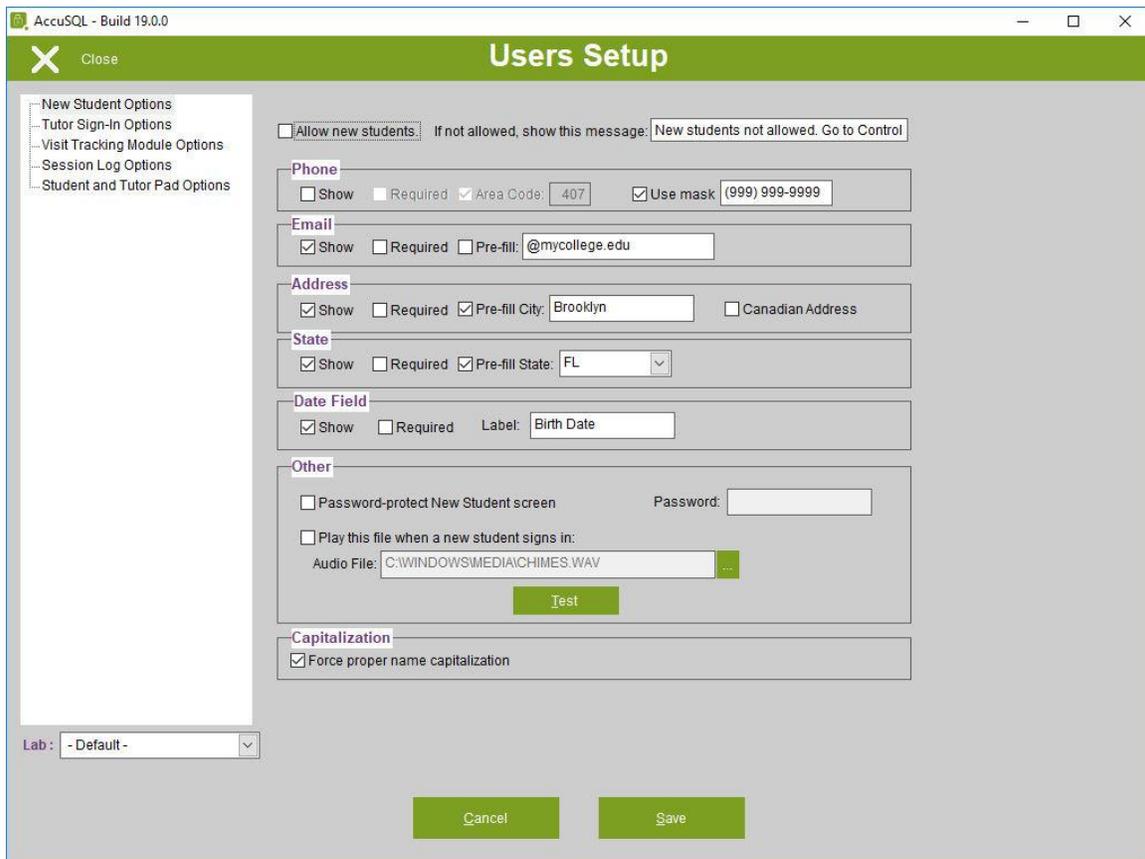
SETTING GROUP MEMBERS TO INACTIVE

If you click the Set Group Members to Inactive button, you can set every member of the Tutor Group to inactive. Setting to inactive will inactivate the tutor record for each tutor in the group. Remember, if tutors are set to inactive you will still retain all of their sign in and other data, but they will be unable to sign into the system.

Tip: If you have a tutor that is also a student with the same ID number and you inactivate the tutor record, then they tutor will not be able to sign in as a student or a tutor. You can get around that by editing the tutor record and changing the ID number perhaps by changing the first digit to an I for inactive. By changing the tutor ID, it will enable the user to sign into the system in a student capacity as long as their student record is still active.

USERS SETUP OPTIONS

While you can use the Control Panel option on the right side of the System Administration screen to access all of the various setup options in the system, there is a better way. First, select an option on the left menu, then click the Setup option at the bottom right of the System Administration screen to show all of the Control Panel settings for that option. If you click Users (your terminology may say Students) from the main System Administration screen, then select Setup, you will be presented with a Control Panel Options view that shows context specific setup options for the Users screens.



Here are the Control Panel options for Users:

- **New Student Options** – Used to configure the options for when and how you deal with new students in AccuSQL/AccuTrack
- **Tutor Sign-in Options** – Used to configure how tutors sign into the system and rules about those sign-ins.
- **Visits Tracking Module Options** – Used to control student sign in workflow and to enable or disable guest sign-ins.
- **Session Log Options** – Used to create rules about how tutors enter session notes about their tutoring experiences with the various students they have helped.
- **Student and Tutor Pad Options** – Used to show or hide the Student and Tutor Pad on the main sign-ins screen and also to determine what students and tutors can access from the Student or Tutor Pad.

NEW STUDENT OPTIONS

To access the New Student Setup options, click Users in System Administration, then the Setup tab. The New Student Options screen should be selected by default. If not, click on it on the left side of the Options screen.

Use this screen to configure the New Student screen. Among other things, you can decide whether to collect contact information, and if so the default values for these entry boxes.

Allow new students: Check this box if you want students who are not already in the AccuSQL/AccuTrack database to be able to sign in. Whether a student (or any other users for that matter) exists in the system is determined by checking against their ID. If the ID does not already exist as a student, then students will be allowed to enter their own information at first sign in if this option is checked. If this option is not checked, you can enter the message that AccuSQL/AccuTrack will display when a new student tries to sign in. If you have the capability to import students into the system, then the Allow new students box would typically be set to unchecked. **Note:** Importing data is the preferred method to ensure data integrity. Go the Database >> Import screen and then click the Need help? Click here button to find out all about imports.

Phone:

Show: Check to show the phone box. **Required:** Check if you want to require students to enter their phone number. **Area Code:** Enter the default area code here. If you like, you can also change the phone mask from the default US format. This is useful if you are in a country outside of the U.S. Click the **Use mask** box if you want to format the way phone numbers display. Use 9 as a placeholder. **Note:** If you use a mask, then if you import student records, do so only as numbers, i.e. 5554443434.

Email:

Show: Check to show the email box. **Required:** Check if you want to require students to enter their Email address. **Pre-fill:** You can put the common college email address extension here (e.g. @yourcollege.edu).

Address:

Show: Check to show the address box. **Required:** Check if you want to require students to enter their address. **Pre-fill City:** Enter a default city. **Canadian Address:** Check if you want to show Canadian provinces instead of US states.

State:

Show: Check to show the state drop-down. **Required:** Check if you want to require students to select a state. **Pre-fill State:** Select the default state from the drop-down.

Date Field:

Show: Check to show a date entry box in the New Student screen. **Required:** Check if you want to require students to enter a date. **Label:** Enter the label of the date box (e.g. Birth Date or Grad Date).

Password-protect New Student screen:

Turn this option on if you want to control the addition of new students to the AccuSQL/AccuTrack database. If this option is on, when a new student signs in, AccuSQL/AccuTrack will display a password entry box. If the correct password is entered, then the New Student screen will be displayed and the student will be able to proceed. This feature is useful if you want to approve the addition of new students after verifying they are eligible for your services. You can have one of your staff members verify the student and then enter the password to allow the sign-in. If this option is enabled, enter the password you want to use in the *Password* text box.

Play this file when a new student signs in:

Use this box if you want AccuSQL/AccuTrack to flag new students by playing a sound file when they first sign in. Use the Audio File entry box to type the path and name of the audio file. You can also use the browse “...” button to select the file. To test the audio file, click the Test button.

 **Note:** The sound file must be in wave (.WAV) format. Use this feature to alert you when new users sign-in. This is useful if you offer first-time users need special assistance or instructions.

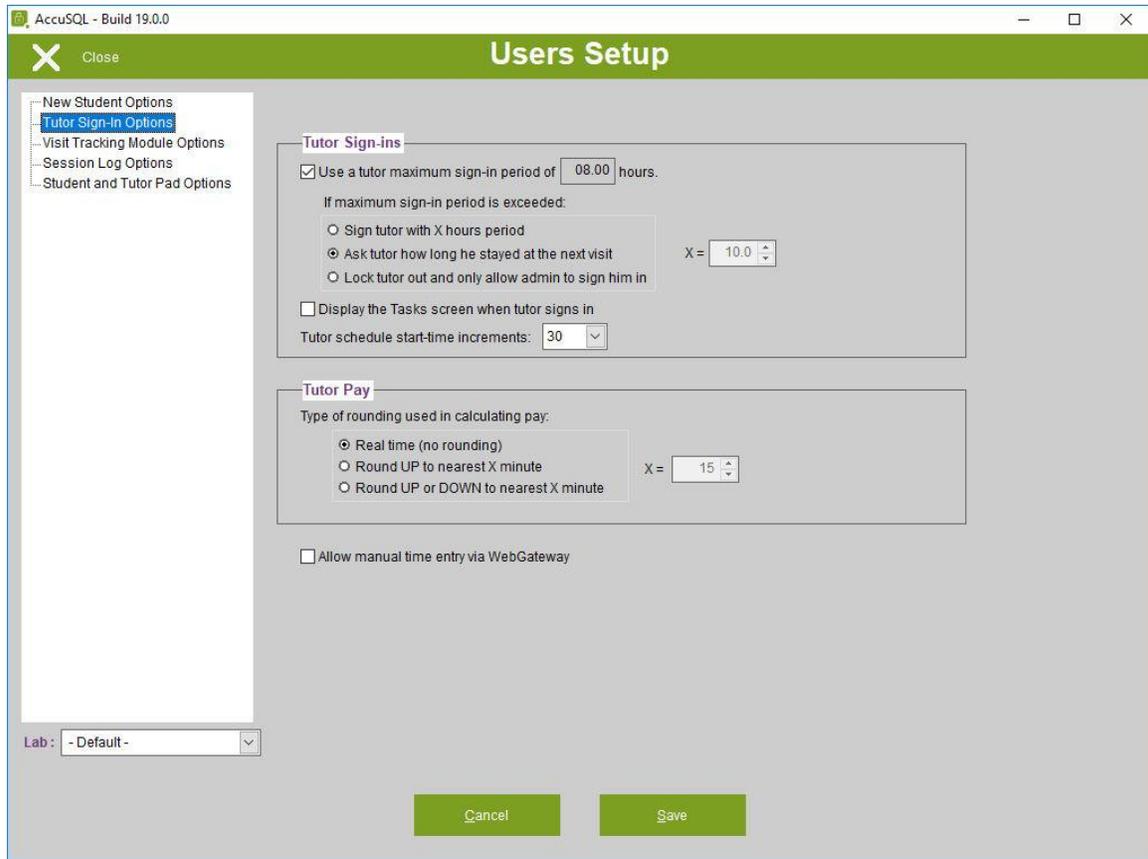
If you have the play function enabled, AccuSQL/AccuTrack will play the selected sound file when the user clicks on "Next" in the New Student screen.

Force Proper Name Capitalization:

Check this box if you want AccuSQL/AccuTrack to automatically convert names entered in the New Student screen to title format (first letter in upper case, and the rest in lower case.).

TUTOR SIGN-IN OPTIONS

To access the Tutor Sign-in Setup options, click Users in System Administration, then the Setup tab in the bottom right of the screen. Now click on Tutor Sign-in Options on the left side of the Options menu to select it.



If you track your tutors’ works hours, use this screen to control the tutor sign-in options:

Use a tutor maximum sign-in period of X hours: Use this option to enter the maximum sign-in period for tutors. Next use the radio buttons to determine what happens when this maximum sign-in period is exceeded:

- Sign tutor with X hour period: Choose this option if you want tutors who exceed the maximum sign-in period to get signed out with X sign-in period. Set X to whatever you like using the X= spinner box.
- Ask tutor how long he stayed at the next visit: Choose this option to have AccuSQL/AccuTrack ask the tutor at the next visit to enter the sign-in period for the previous visit in which the maximum sign-in period was exceeded.
- Lock tutor out and only allow admin to sign him in: Choose this option for maximum control over the accuracy of the sign-in records. With this option selected, when a tutor exceeds the maximum sign-in period AccuSQL/AccuTrack will lock the tutor out. To unlock the tutor's record, the tutor must be signed out via the System Administration – Edit Sign-in Logs – Tutors – Sign out screen.

Important: Tutor auto sign outs and numerous other automated tasks in AccuSQL/AccuTrack rely on a background process called AccuTaskRunner. AccuTaskRunner (or optionally the standalone AccuTRConsole.exe located in the folder where AccuSQL or AccuTrack is installed) must be running for these background processes to work. Please see  [Installing AccuTaskRunner \(PDF\)](#) for more information.

Display the Tasks screen when tutor sign in: Check this box if you want to track what tutors do with their work time. If you only want to track the sign-in and sign-out times, uncheck this box.

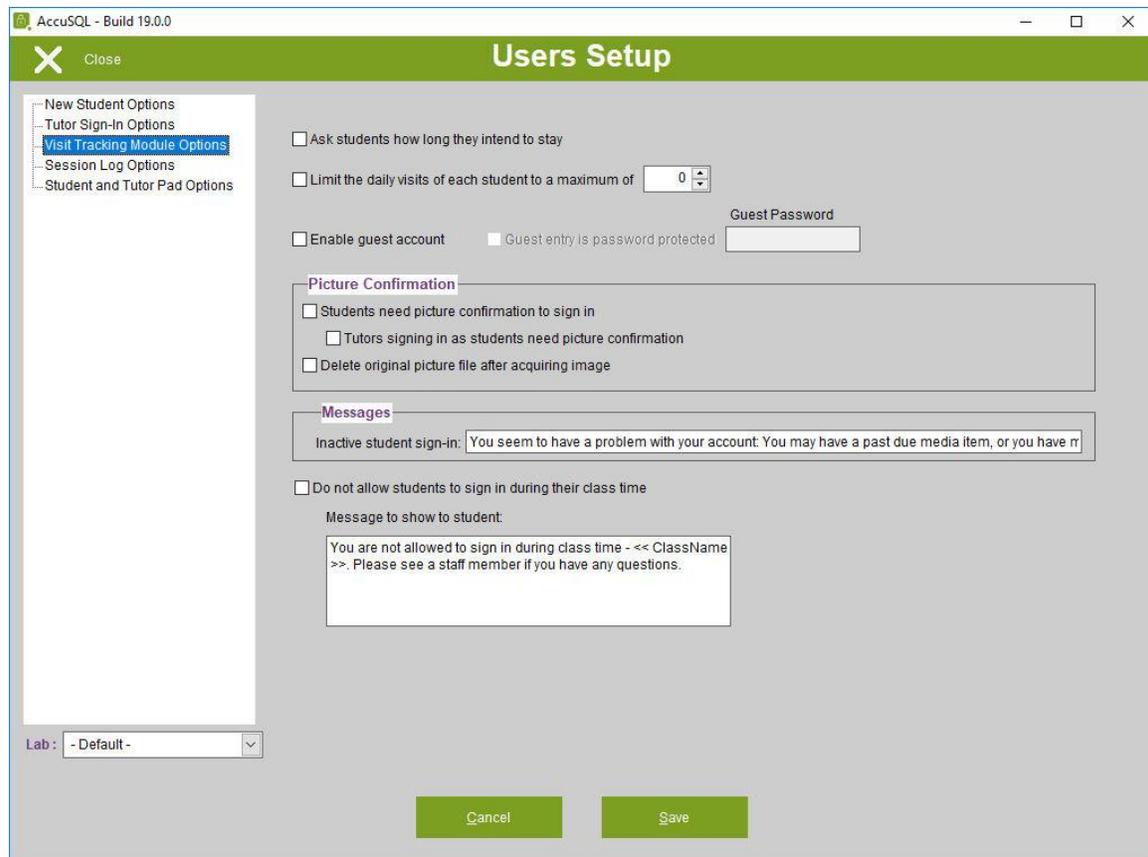
 **Note:** If you use this option, make sure to enter the staff Tasks via the **Tutor Visits Tracking >> Tasks** screen.

Tutor schedule start-time increment: Use the drop-down box to select the increment of the list box used to enter the tutor's schedule. For example, if you use "30", then the tutor's schedule can start and end at 8:00, 8:30, 9:00, and so on. Tutor schedules, along with tutor activity assignments, are used to determine when and if a tutor is available to assist a student either through a sign in from the main screen or to via appointment scheduling.

Tutor Pay rounding: Use this box to determine the rounding rules when calculating the tutor's pay. Rounding is applied to each session and not to the accumulated time. Select the first option if you do not want to do any rounding. Select the second option if you want to round the time up (e.g. if X=15, 47 minutes are counted as one hour for pay purposes). Select the third option if you want to round up or down to the nearest X minutes (e.g. if X=15, 47 minutes are counted as 45 minutes, while 53 minutes are counted as 60 minutes).

VISIT TRACKING MODULE OPTIONS

To access the Visit Tracking Module Setup options, click Users in System Administration, then the Setup tab in the bottom right of the screen. Now click on Visit Tracking Module Options on the left side of the Options menu to select it.



Ask students how long they intend to stay: If this option is checked, AccuSQL/AccuTrack will ask students how long they intend to stay when they sign in. This is useful if you don't want your students to sign out but would like them to select their sign-in period up front. By default, students will be signed in and signed out with the total period equal to what they select for their intended visit period.

Limit the daily visits of each student to a maximum of: Check this box to set the maximum number of sign-ins any student can make in a day. If checked, then set the maximum number using the spinner box.

Enable Guest Account: Check this box if you want to enable guests (not entered in AccuSQL/AccuTrack as students, tutors, or admins) to sign in. Checking this box will add a Guest Sign in button to the main sign in screen. When guests sign in, they will be available on reports all grouped under the name "AccuSQL/AccuTrack Guest". Also if you enable guest sign-ins and are using the Intake Systems, guests will be asked to enter their name so you will know who to call when they are ready to be signed in. The name is only saved temporarily and is not stored permanently in the database.

Guest Entry is password protected: If you enable guest sign-ins, you can require the guests to enter a password to access the sign in options. That password is entered here and is case sensitive.

Picture Confirmation Box

Students need picture confirmation to sign in: check this box if you want to display student's picture at sign in.

Tutors signing in as students need picture confirmation: check this box if you want to show tutor's pictures too when these tutors sign in as students.

Delete original picture file after acquiring image: Check to delete original file after copying it.

Messages:

Inactive student sign-in: type in the message you want to appear when inactive students attempt to sign in.

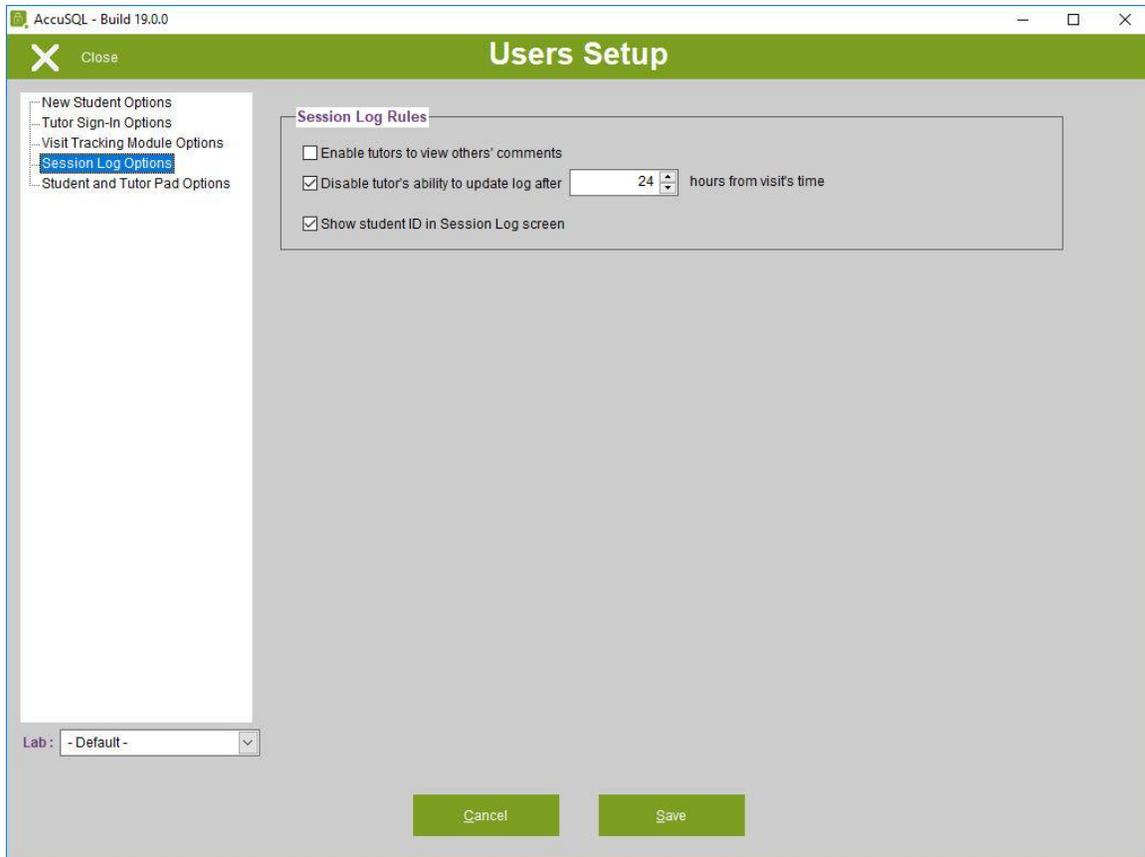
Do not allow students to sign in during their class time

If you are using Activity Schedules for your activities (classes) then check this box if you want to disable the students' ability to sign in when they are supposed to be in class. The system uses the activity schedule in conjunction with Sign-in Setup >> Registration to make this determination.

Message to show to student: If you are not allowing sign-ins during scheduled class time, enter the message you want to display to students when they attempt to sign in when they are supposed to be in class. Note: <<ClassName>> is a merge field that will show the class the student is supposed to be in when they attempt the sign in.

SESSION LOG OPTIONS

To access the Session Log Setup options, click Users in System Administration, then the Setup tab in the bottom right of the screen. Now click on Session Log Options on the left side of the Options menu to select it.



Enable tutors to view others' comments: This option affects comments displayed when a tutor signs in to the Session Log screen via the Tutor Pad or through the [Staff Panel](#) application. Check this option if you want each tutor to be able to view the comments made by other tutors. If this option is not checked, tutors can only view their own comments.

Disable tutor's ability to update log after X hours from the visit's time: Check this option to limit the amount of time that a tutor has to edit the sign-in logs via the Tutor Pad. If this option is checked, you can enter a value in the spinner box. For example, if you set this option on and the spinner box to 24, then tutors can update the comments up to 24 hours from the visit's sign-in time. No edits will be allowed after the 24 hours has passed. This is useful if you want to make sure tutors update the comments while the session is still fresh in their minds, or if you want to prevent tutors from changing the history of the sessions.

Show student ID in session log screen: Check this option to display the student ID in the session log screen.

STUDENT AND TUTOR PAD OPTIONS

To access the Student and Tutor Pad Setup options, click Users in System Administration, then the Setup tab in the bottom right of the screen. Now click on Student and Tutor Pad Options on the left side of the Options menu to select it.

The screenshot shows the 'Users Setup' window in AccuSQL - Build 19.0.0. The window has a green header with 'Users Setup' and a 'Close' button. On the left, there is a tree view with the following items: New Student Options, Tutor Sign-In Options, Visit Tracking Module Options, Session Log Options, and Student and Tutor Pad Options (which is selected and highlighted in blue). Below the tree view is a 'Lab:' dropdown menu set to '- Default -'. The main area of the window contains two columns of checkboxes. The left column is for 'When [Student Pad] is shown student can access:' and includes: Show [Student Pad] button (checked), Reports (checked), Survey (checked), Appointments (checked), Seminars (checked), Media Checkouts (checked), Messaging Center (checked), Profile (checked), and Change Password (checked). The right column is for 'When [Tutor Pad] is shown, tutor can access:' and includes: Show [Tutor Pad] button (checked), Exit Tutor pad once a button is clicked (checked), Tutors MUST enter their password to do any operation (unchecked), Admin (checked), Session Log (checked), Class Sign-in (checked), Reports (checked), Generic Viewer (checked), Monthly Viewer (checked), Weekly Viewer (checked), Daily Viewer (checked), Log in as Tutor (checked), Log in as Student (checked), Log Out (checked), Schedule (checked), Show advanced scheduler (unchecked), Students in Line (checked), Change Password (checked), and Launch AccuBuzz (checked). At the bottom, there is an 'Other' section with a checkbox for 'Ending Class Sign-in Session requires a password.' and a 'Password:' input field. At the very bottom of the window are 'Cancel' and 'Save' buttons.

Use this screen to configure the student and tutor access options. Each box that is checked off will display a different button on the Student pad or Tutor Pad. From those screens, the users will be able to jump to whatever feature they need to use. If you uncheck a selection, then the button for the selection will be grayed out in the Student or Tutor Pad respectively.

Tip: Tutors will automatically access the Tutor Pad when then sign in using Tutor credentials. You are not required to show the Tutor Pad button on the main screen for this to happen. If you want to hide the Tutor pad button from the main screen, you should first select the Show Tutor Pad button, then you can check or uncheck the options you want to appear in it and then you can uncheck the Show Tutor Pad button and click Save at the bottom of the screen to save your changes.

Note: Please see Student and Tutor Pad Options later in this document for an explanation of the various options available, as well as a Video Learning Series video.

Ending a Class Sign-in Session requires a password. If you check this box, then the tutor will be required to enter a password to end a sign in for a class. This is helpful to prevent students who are signing into the class from inadvertently ending the class sign-in prematurely. BUBBA

SIGN-IN SETUP

When you click on Sign-in Setup from the Main Menu, you will see the following options:

1. **Categories & Activities:** Use to set the activities (or courses) that are available for students to select at sign-in.
2. **Registration:** Use to manually register students for classes. Typically this information is entered via a data import.
3. **Service Type:** Use to add or edit Services. You can present the Services to students at sign-in in the Services selection box.
4. **Course Coverage:** Use to check the tutors that are assigned schedules for the various appointment scheduling blocks.
5. **Schedule Builder:** Use to review the schedules that have submitted by your tutors, edit the submissions as necessary, save the schedules, save them as the default schedule and to email tutors with their approved schedules.
6. **Tutor Availability:** Use to create available or preferred time for tutor schedules which at then reviewed and approved in the Schedule Builder screen. Admins can use this screen to manually assign schedules per tutor, and tutor can access this screen from the Tutor Pad where they can modify inly their schedules.

The following sections have more information on the above screens.

CATEGORIES & ACTIVITIES SCREEN

Purpose: To add new activities or modify current student activities.

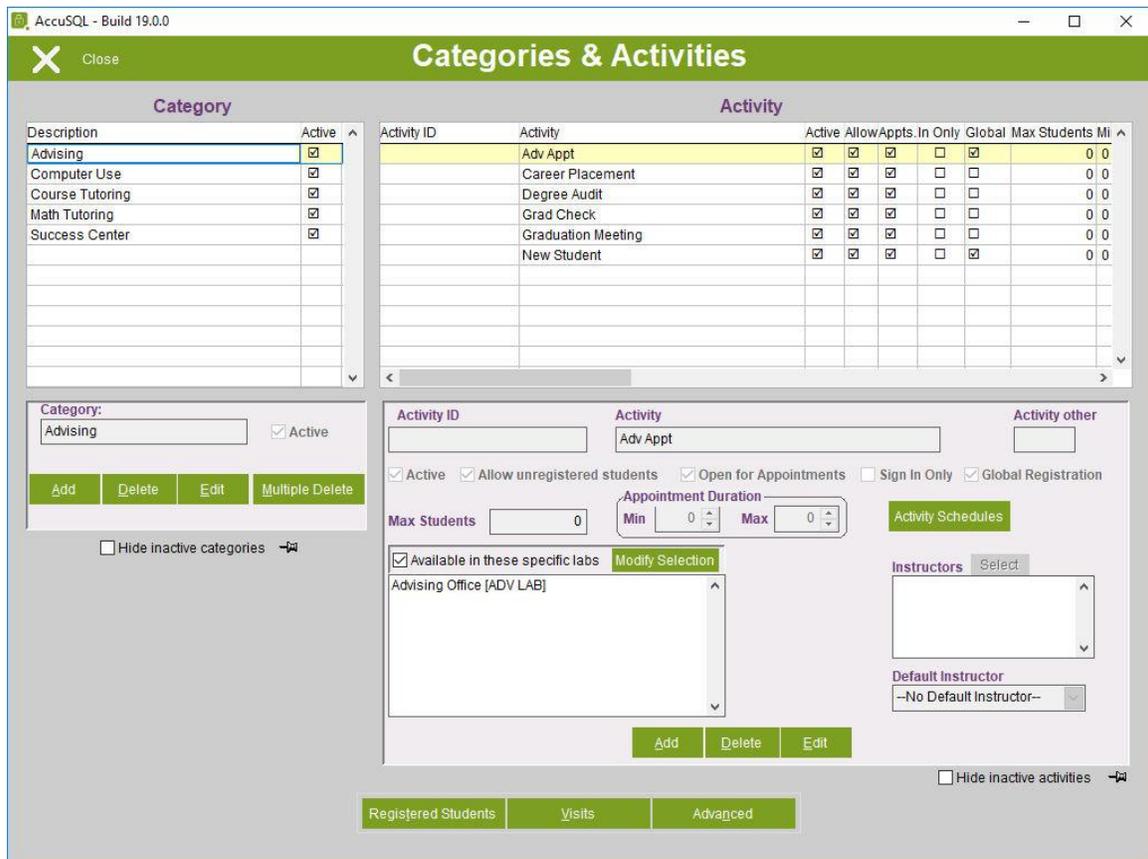
Access: From System Administration, click on **Sign-in Setup** then on **Categories & Activities**.

Activities represent what students do at your center. If you have a tutoring center, the activities are the tutored classes. If you have an advising center, the activities are the advising services you offer. When students sign in, AccuSQL/AccuTrack will display a list of activities and ask the student to select the one they are using. Collecting this data makes it possible for AccuSQL/AccuTrack to report on the usage of your services. See other parts of this manual for sample Activity reports.

AccuSQL/AccuTrack gives you the flexibility to define and enter activities as appropriate for your center. Related activities are grouped together under “**Categories**”. Each category consists of at least one activity. You can have as many categories and activities as you like. However, you should make the

number reasonable so it is easy for your students to find the appropriate selection. If you use student registration, discussed later, then this would be a non-issue.

Before you enter the activities, think about what you need to track and report on. Create a list, and group related activities in categories. When you're ready, enter the categories and activities. If you decide that you want a selection from the courses you offer, then you would be much better served importing your activity (class) information into AccuSQL/AccuTrack from a CSV file (discussed later).



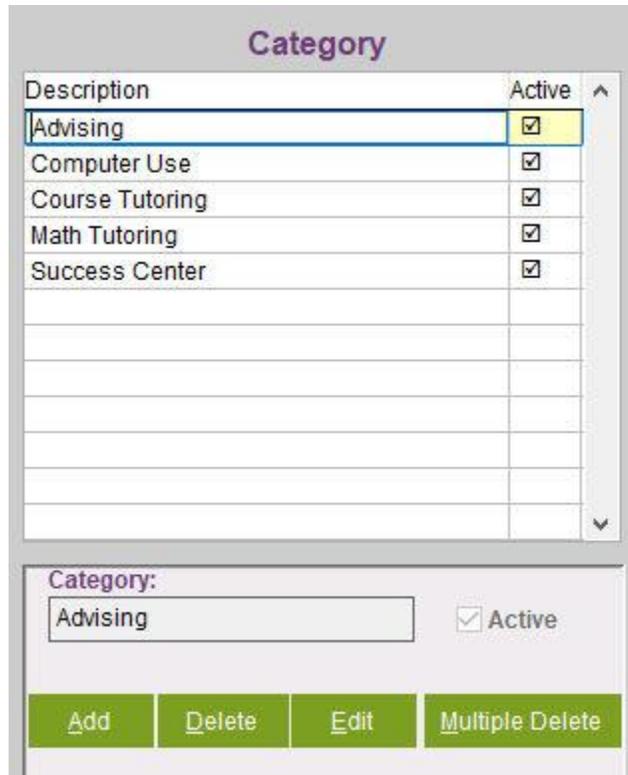
You will see two list boxes displaying the current categories and activities. The list box on the left shows the categories. The list box on the right shows the activities under the selected category.

Tip: The screen uses a *SuperTable*. See page 404 for tips on doing searches and other useful functions provided by this powerful control.

WORKING WITH CATEGORIES

ADDING A CATEGORY

To add a new category, click the **Add** button on the left then type its name in the *category entry box*, and click the **Save** button. The category’s name will move from the text box to the **Category** list grid.

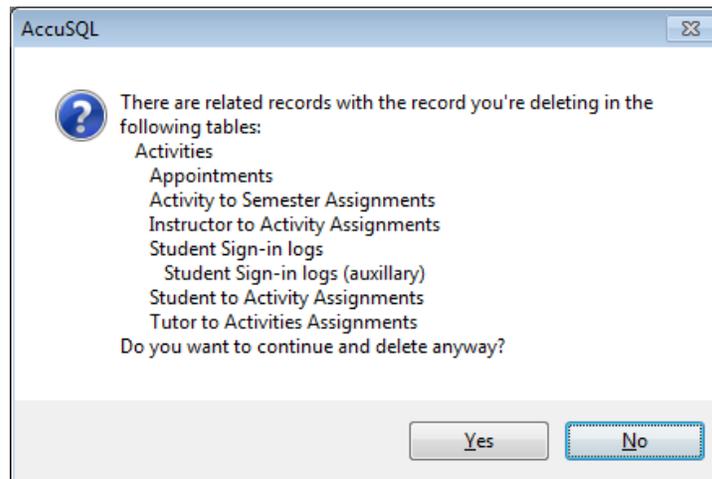


EDITING A CATEGORY

To **edit** a category, highlight it in the **Category** list box by clicking on it, and then click on the **“Edit”** button under the Category text box. You can also double click on the category name to edit it. The category will be copied to the *entry text box* where you can make the changes. When you click the **“Edit”** button, the **“Save”** and **“Cancel”** buttons appear. If you want to keep your changes, click the **“Save”** button. If you want to keep the category as it appears in the **Category** list box, click on the **“Cancel”** button.

DELETING A CATEGORY

To remove a category from the list, highlight it by clicking on it and click on the **“Delete”** button. AccuSQL/AccuTrack will check to make sure that the category does not have activities under it. If so, it will display a confirmation message.



Important: If you delete a category or activity that has records associated with it, you will also lose the associated records. For example, if students sign into a MATH 1101 College Algebra class and you deleted that class, you will also lose the record of any sign ins into that class.

If you answer “**Yes**”, the category will be deleted.

If the category has activities under it, you can delete it using the Multiple Delete button. Be very careful using this option, since you do not want to lose any sign-ins associated with the activities. It is often a better option to make the category *inactive* if you want it to appear in any reports or at student sign-in.

MAKING A CATEGORY INACTIVE

If you need to remove a category from the sign-in screens because it is no longer needed, and you are not able to delete it because it is needed for reports, you can make the category inactive. Inactive categories do not appear in the sign-in screens, but are still available for historical purposes.

To make a category inactive, first highlight it and click on “**Edit**”, then uncheck the *Active* check box by clicking on it, and then click “**Save**.” An Active checkbox that is unchecked will appear next to any category that is inactive.

WORKING WITH ACTIVITIES

Activity

Activity ID	Activity	Active	AllowAppts.	In Only	Global	Max Students	Mi
	Adv Appt	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0 0
	Career Placement	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0 0
	Degree Audit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0 0
	Grad Check	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0 0
	Graduation Meeting	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0 0
	New Student	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0 0

Activity ID **Activity** **Activity other**

Active
 Allow unregistered students
 Open for Appointments
 Sign In Only
 Global Registration

Max Students
Appointment Duration
 Min Max
Activity Schedules

Available in these specific labs Modify Selection

Advising Office [ADV LAB]

Instructors Select

Default Instructor
--No Default Instructor--

Add
Delete
Edit

ADDING AN ACTIVITY

To add an activity, follow these steps:

- 1) Select the Category under which the activity will be added by clicking on the category in the left of the screen.
- 2) Click on the “**Add**” button under the Activity text box. The activity screens will now be available for you to enter the information. The minimum information you must enter is the Activity.
- 3) Enter the activity’s name in the “*Activity*” entry box located under the Activity label. You can optionally enter an *Identification Number* (e.g. the Class Registration Number), and you can also enter text in the *Activity Other* (e.g. section number).
- 4) (Optional) Select the instructor from the “Instructor” Select button. To select multiple instructors, click the checkboxes next to each instructor you want to add.

- 5) (Optional) If this activity is only offered at a certain lab, select the Available in these specific labs checkbox and then click the Modify Selection button to select in which other labs you offer this activity. You may associate each activity to multiple labs, if necessary. If you are not using the Local Labs feature, leave the lab empty. **Tip:** You can make multiple activities available in a Local Lab in the System >> Lab IDs screen, discussed later in this document.
- 6) If you do not want new students to sign in to this activity, clear the “Allow unregistered students” check box.
- 7) If you want this activity to appear in the appointments screen, make sure the “Open for Appointments” check box is checked.
- 8) If you want people to only sign in to this activity without having to sign out, check the “Sign in Only” check box.
- 9) If you want this activity to be available for all students to select at sign-in regardless of whether they are registered for that activity or not, make sure the “Global Registration” box is checked. If you have “only show registered activities checked in the Sign-in Setup >> Setup >> Activity Screen Options screen, then students will see the classes (activities) they are registered for and also any activities set to Global Registration.
- 10) You can assign this activity to one or more labs by checking the “Available in these specific labs” checkbox and then clicking Select labs button to select the lab(s) where it should be available. Local labs are discussed later in this document.

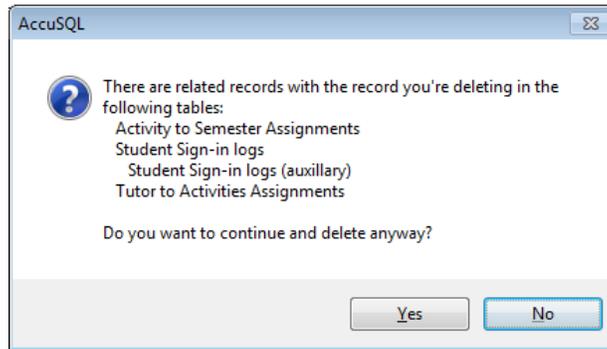
 **Tip:** The items available in the instructor’s selection box are set up in the Instructors screen. Activities and their instructors are also importable.

EDITING AN ACTIVITY

To **edit** an activity, highlight it in the **Activity** list box by clicking on it, and then click on the “**Edit**” button under the Activity List box. You can also double click on the activity’s name to edit it. The activity will be copied to the *Activity entry box* where you can make the changes. If you want to keep your changes, click the “**Save**” button. If you want to keep the activity as it appears in the list box, click on the “**Cancel**” button.

DELETING AN ACTIVITY

If you enter an activity by mistake, and wish to remove it from the list, highlight it by clicking on it and click on the “**Delete**” button under the activity list box. AccuSQL/AccuTrack will check to see whether anyone signed in to this activity. If so, it will show this message:



Important: If you delete an activity that has records associated with it, you will also lose the associated records. For example, if students sign into a MATH 1101 College Algebra class and you deleted that class, you will also lose the record of any sign ins into that class.

Answer “**Yes**” to delete the activity.

If you want to keep the activity for the reports, you can make the activity *inactive*. This means the activity will not appear in the sign-in screens, but it will still exist in the database for use in reports.

Tip: You can make activities active or inactive in the System >> Semesters screen.

MAKING AN ACTIVITY INACTIVE

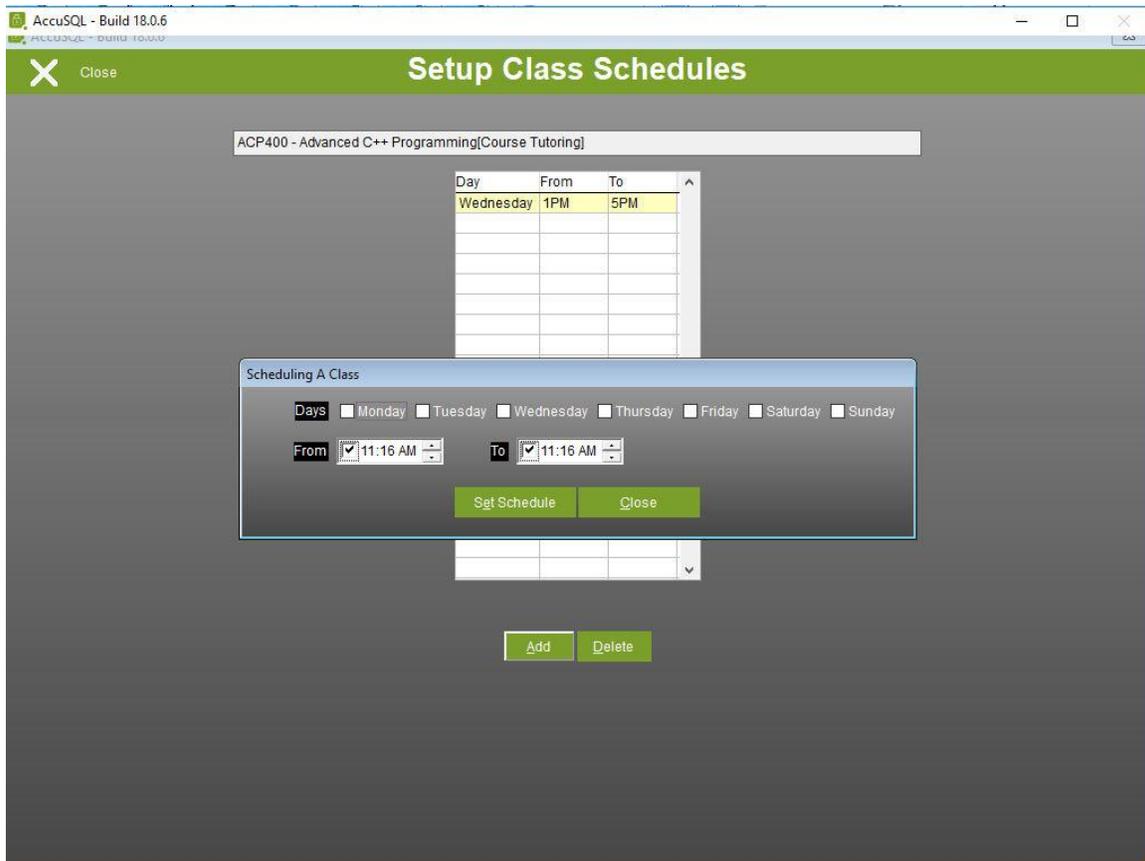
To make an activity **inactive**, first highlight it and click on “**Edit**”, then uncheck the *active* check box by clicking on it, then click “**Save**.” An empty check box in the activity row under the “Active” column indicates that the activity is inactive.

 **Tip:** If the activity is not appointments-related, uncheck the “Open for Appointments” box and the activity will not appear in the Appointments screen. For example, if the activity “Self-Study” does not require appointments with a tutor, you should uncheck the “Open for Appointments” checkbox when you add that activity.

 **Tip:** If the activity does not require a sign out, check the “Sign In Only” box and AccuSQL/AccuTrack will sign the student out at the same time they sign in. This is useful for example if you want to know the number of visitors to an activity but do not care to know how long they stayed.

ACTIVITY (CLASS) SCHEDULES SCREEN

To create a new class schedule, click the Add button.

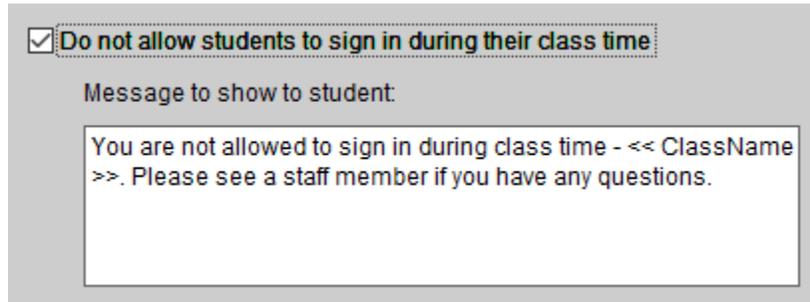


In the Days area, check the boxes for the days of the week when the class is scheduled. In the From and To boxes enter the time when this class takes place for the days you have selected

After you are done creating the class schedules, you would need to make sure there are students registered for the classes. The students who will not be able to sign in during class are checked against who is registered for that class. Class (activity) registration for students, can be done manually in the Sign-in Setup >> Registration screen, but is typically done via a Student Registration import (discussed later).

If you have lots of students and classes to add, you can import the class schedules using the Database >> Import option in AccuSQL/AccuTrack. The target table is Class Schedules. The Class Schedules import is discussed later in this document.

To prevent students from signing in during the date and time of the classes, click Setup from the Users screen, then click Visit Tracking Module Options. In that screen, click the Do not allow students to sign in during their class time checkbox. You can also specify the message that student will see if they try to sign in during their class time.



Note: <<ClassName>> is a merge field and should be kept intact if you want to display the class the student is scheduled for in the pop-up message.

USING THE ACTIVITY CENTRAL BUTTONS

The Modify Activities screen has a tool bar at the bottom:



To get information on a specific activity, first select it in the **Activity** list box by clicking on it. You can then click on one of the following buttons:

1. **Registered Students:** Shows a list of students registered to this activity. Students can be registered to an activity via importing the registration table, by registering them via the Registration screen, or by simply signing in to the activity (if allowed). When you click on this button, registered students will be displayed. Here is an example:

The screenshot shows a window titled "Registered Students" with a table of registered students. The table has columns for Student Name, Registered On, and Registered By. The data is as follows:

Student Name	Registered	
	On	By
Abbott, Meecsha E	08/06/2013 09:37 AM	Admin
Dee, Mickey	08/06/2013 09:37 AM	Self
Harrison, Jennifer	08/06/2013 09:38 AM	Self
Karki, Belinda	08/06/2013 09:37 AM	Admin
Keeton, Jon R	08/06/2013 09:37 AM	Admin
Lawler, Guadalupe O.	08/06/2013 09:37 AM	Admin
Lawler, Susy P	08/06/2013 09:37 AM	Admin
Lawrence, Nancy M	08/06/2013 09:37 AM	Admin
Seruntine, Lei B.	08/06/2013 09:37 AM	Admin
Sesy, Llana L.	08/06/2013 09:37 AM	Admin
Sewell, Izzat A	08/06/2013 09:37 AM	Admin
Sharpe, Goldie G	08/06/2013 09:37 AM	Admin
Total:12		

2. **Visits:** Shows a list of students who used this service during the current semester. Here is an example of this screen:

Visits to [Anatomy and Physiology II (Registered Classes)]

Student Name	Sign In	Sign Out	Period	Tutor	Instructor	Service
Dee, Mickey	08/06/2013 09:38 AM	08/06/2013 10:48 AM	01:10	Bates, Liz	Allen, Woody	Self Study
Harrison, Jennifer	08/06/2013 09:38 AM	08/06/2013 11:18 AM	01:40	Bates, Liz	Foster, Richard	Required Hours
Total2						

3. **Advanced:** This button displays a form that gives you more control over the reports available on the selected activity. You can change the reporting period from the default 'semester' period to any period you like. You can then select which report to show (Registered Students, Visits, or both). Finally, you can select the format of the report: Preview will show the report on the screen, "Save as HTML", will save the report as a web html format, "Save as Word Document" will save the report as MS Word document, and "Save as Excel Workbook" will save the report in MS Excel format.

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Categories & Activities

Category	Activity	Active	AllowAppts	In Only	Global	Max Students	Mi
Advising	ACP400 Advanced C++ Programming	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0
Computer Use	ALG301 Algebra 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0
Course Tutoring	ALG302 Algebra 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0
Math Tutoring	CAL401 Calculus	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0
Success Center	ENG405 Software Engineering	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0
	ICP305 Intro C++ Programming	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2	0
	JP4400 Java Programming	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0

Activities Central

Select one or more items (to select multiple items use [Ctrl+Click])
To change the order of items click and drag little box

Period: This Semester

From: Sat, Sep 01, 2018, 12:00 AM

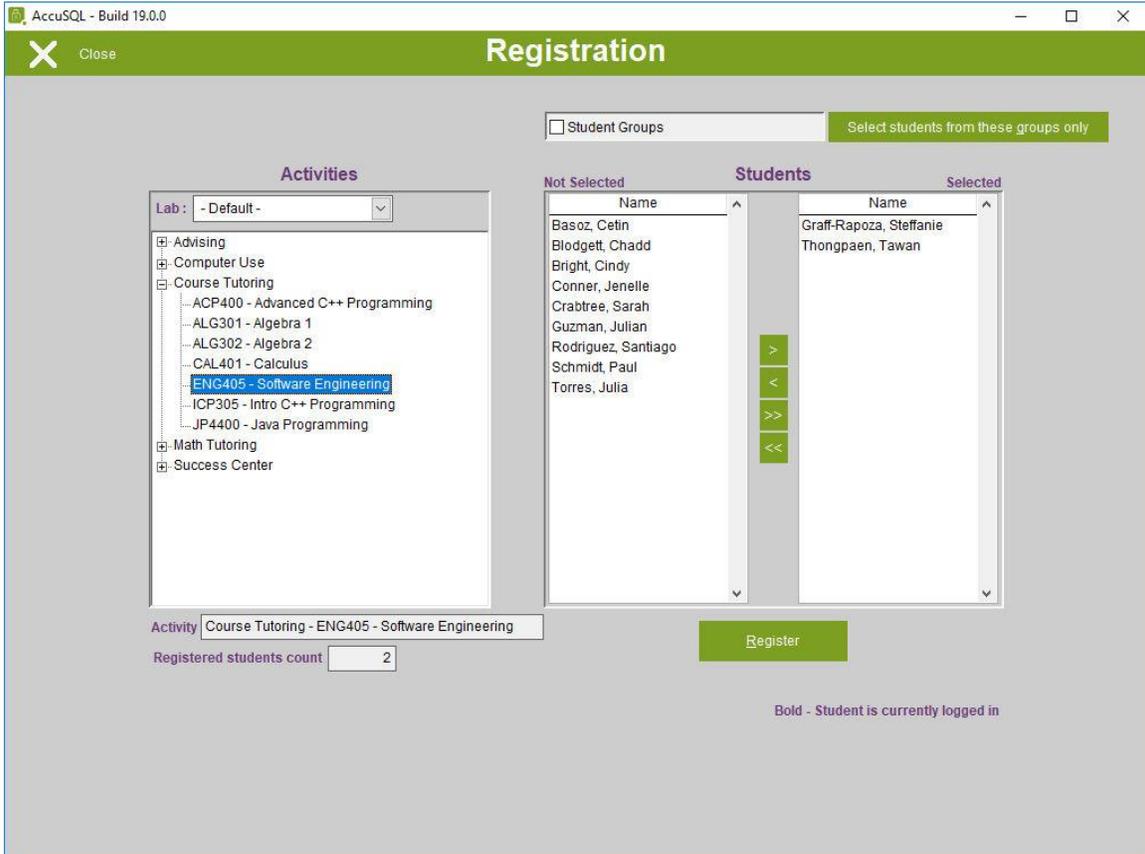
To: Mon, Dec 31, 2018, 11:59 PM

Registered Students
 Visits

REGISTRATION SCREEN

Purpose: To view and modify students’ registration to classes / activities.

Access: From System Administration, click on Sign-in Setup>>Registration.



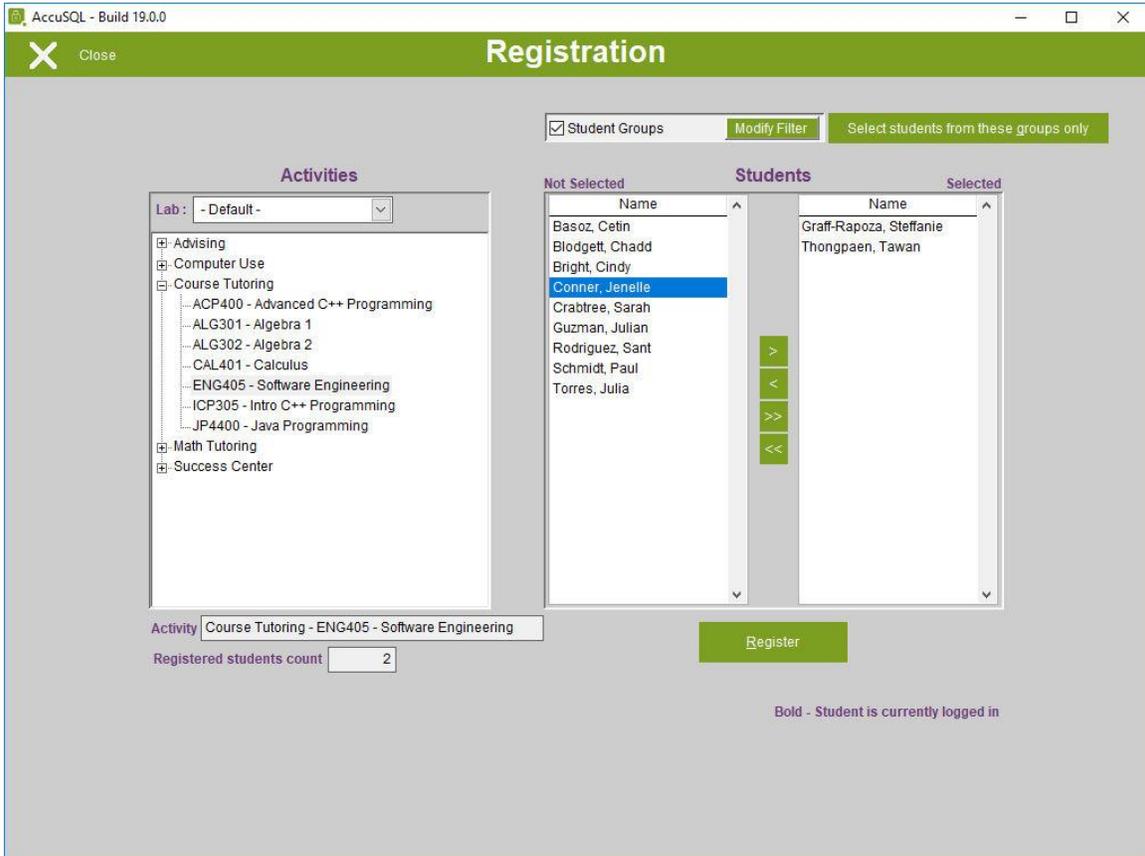
To view or modify the registration of a certain class, first select the class from the tree control on the left side of the screen. When a class is selected, AccuSQL/AccuTrack displays its registered students in the “Selected” list box on the right side of the screen. The software also shows the number of registered students in the class in the “Registered Students Count” box.

To drop a student from a class, simply highlight the name in the "selected" list box and move it to the "Not selected" list box. To add a student to a class, simply move the name from the "Not Selected" to the "Selected" list box. When you are finished with the changes, click on "Register" to save them.

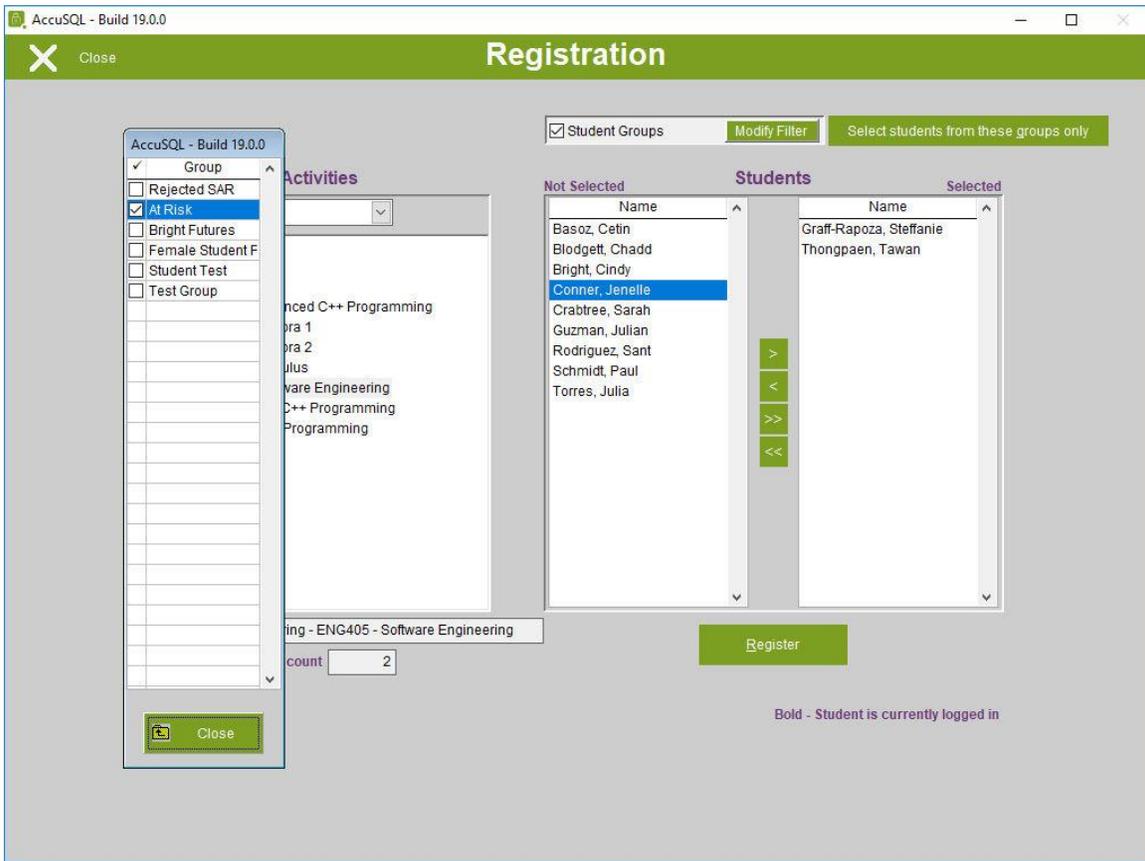
Tip: If you want to register student for all the classes under a particular category, select the category itself and click the Register button.

REGISTERING A STUDENT GROUP

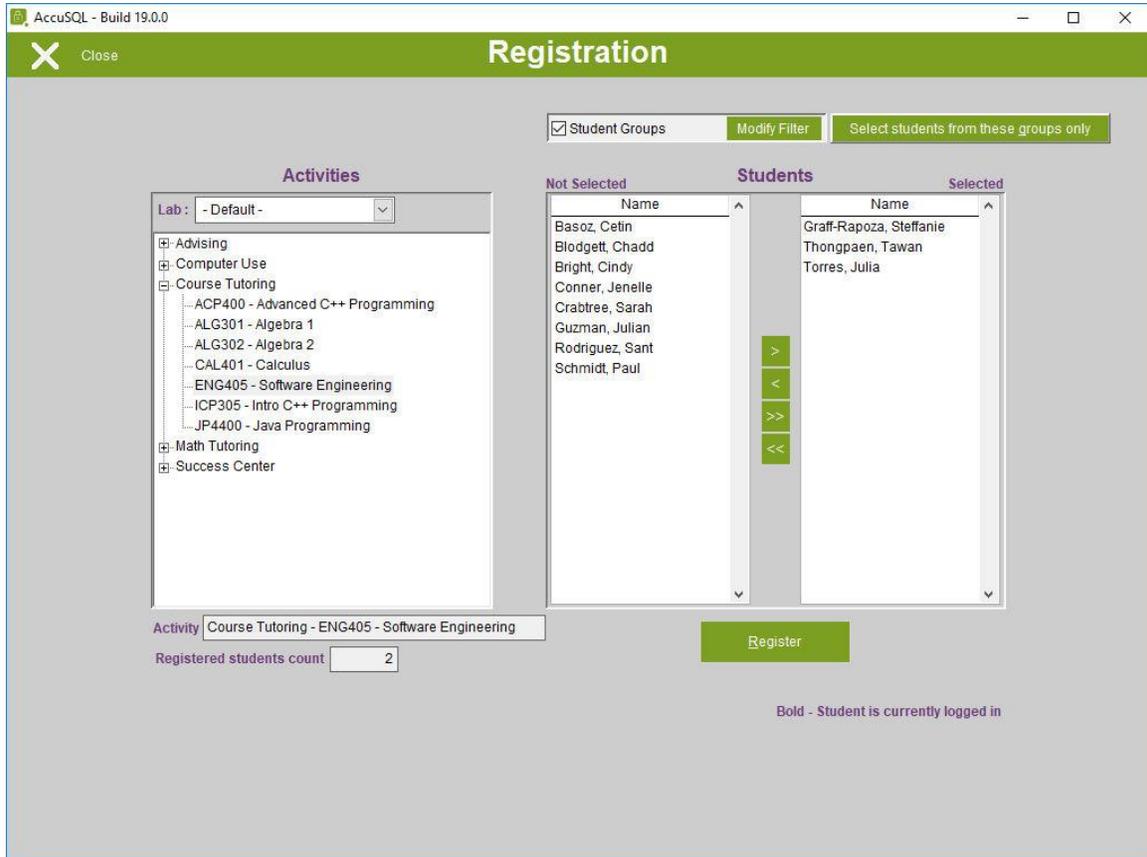
To register a group of student to a class, first select the desired class in the grid on the left and then click the Student Groups checkbox. The Set Filter button will appear.



Click Set Filter to select students from one or more groups and then click Close.



Now click the Select students from these groups only button and the students in the group(s) will automatically be moved to the “Selected” side of the Students grid.



Finally, click the Register button to complete the registration.

REGISTRATION SOURCES

Note that there are 5 sources for registration data:

1. Registration data import via the *Import Wizard*.
2. Manual registration via the Registration screen in System Administration.
3. Manual registration of a student group via the Registration screen in System Administration.
4. Student self-registration: This occurs when a student signs into a new class that he or she is not registered. When this happens, first AccuSQL/AccuTrack will display a message to make sure student did not select the class by mistake: If the student answers “Yes”, AccuSQL/AccuTrack will add him to the selected class. Note that you can get a report of ‘self-registration’ that show students who added themselves to a class. You can also turn off this option completely, discussed in Sign in Setup >> Setup >> Activity Screen Options later in this document.

- Registration via admin sign-in: This occurs when an administrator signs the student to a class via the “Sign Student In” screen. If the student is not registered in the class, AccuSQL/AccuTrack will add the student to the registration list.

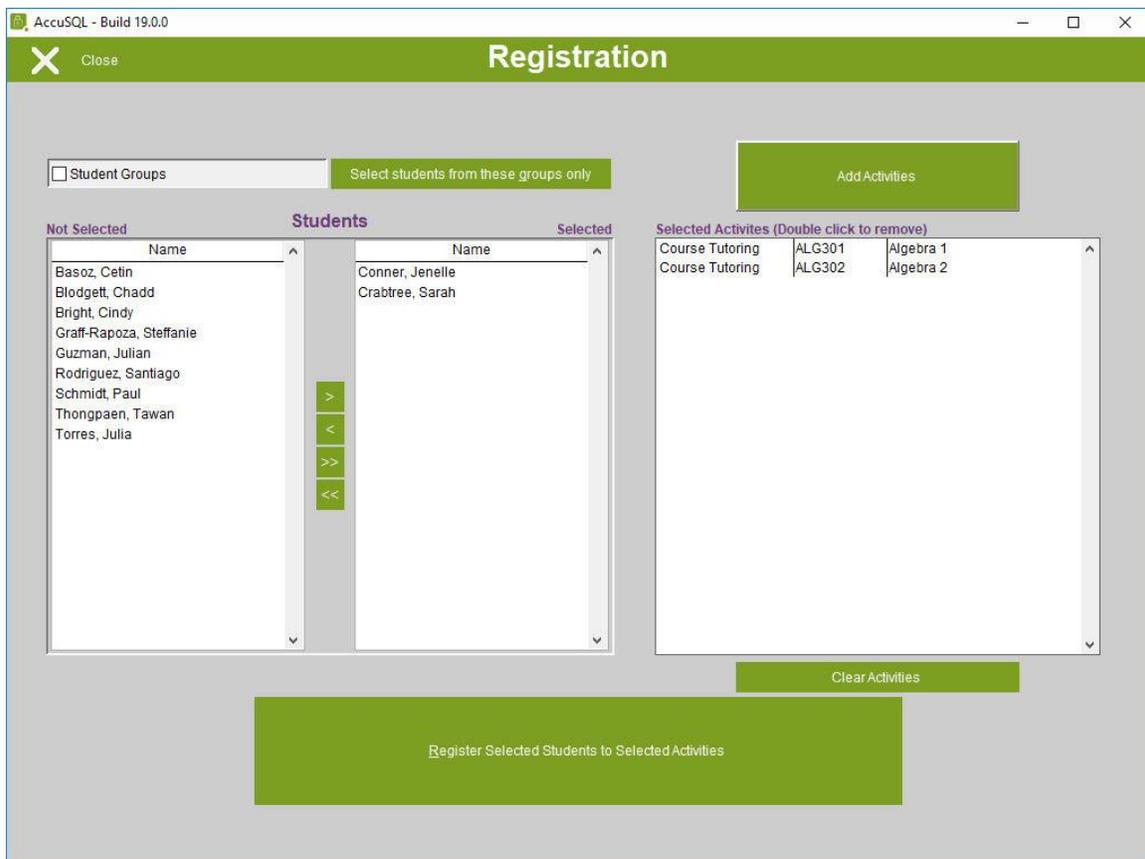
REGISTRATION (MULTI) SCREEN

Purpose: To view and modify multiple students’ registration to one or more classes / activities.

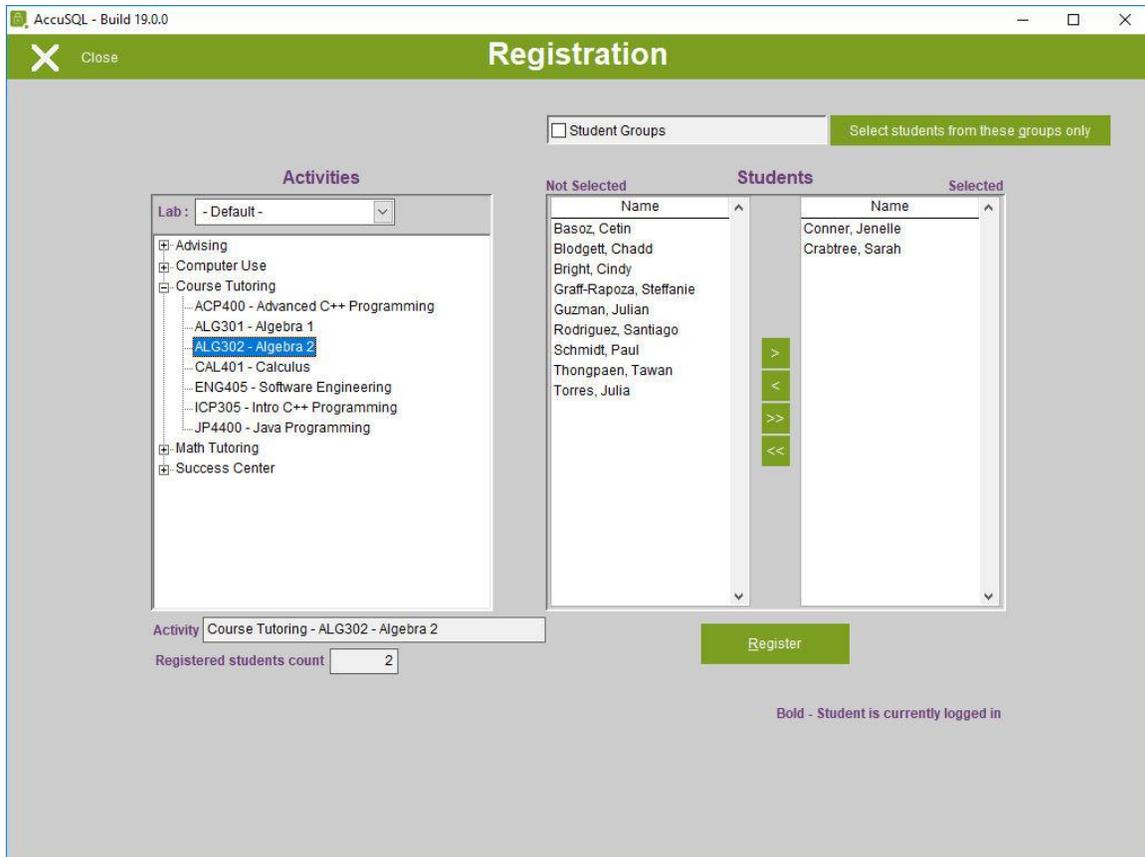
Access: From System Administration, click on Sign-in Setup>>Registration (Multi)

Registration (Multi) screen enables you to register multiple students either from a student group or from a select list for one or more activities at the same time. While the current Registration screen already allows you to register students for all of the activities under a single category, this new feature offers more flexibility to select the exact activities to which you want to register students.

In the following example a student group of former military personnel (selected from Student Groups > Modify Filter) is selected and the students that comprise that group will be registered for three activities under an Advising category:



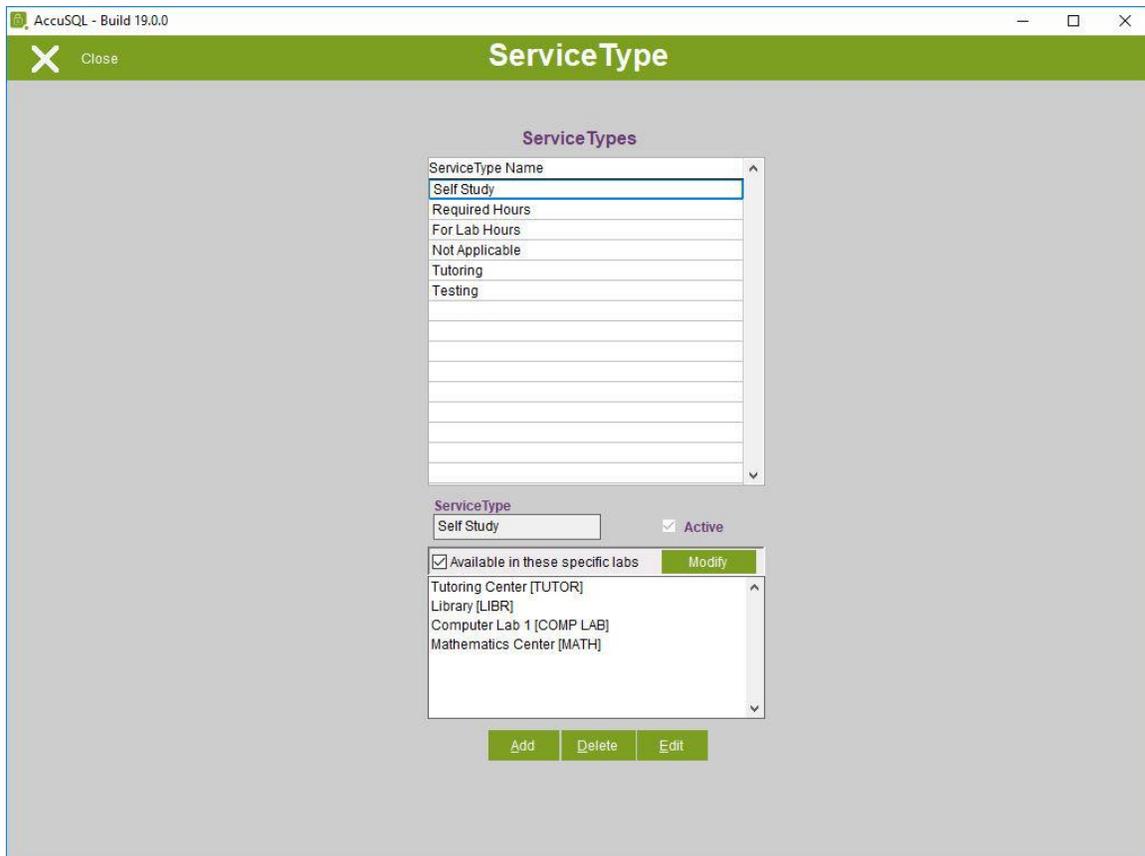
Once the process is completed, the registration can be reviewed in the Sign-In Setup >> Registration screen:



SERVICE TYPE SCREEN

Purpose: To set up the type of services used by students.

Access: From System Administration, click Sign-in Setup >>Service Type.



Use this screen to add the types of services used at your center. AccuSQL/AccuTrack can display a “Service Type” drop-down box in the Activity Selection screen. You can also assign a particular Service Type to one or more local labs. The students can then select the type of service they are using. The items appearing in the drop-down box are set up in this screen.

To add a new service type item, click on the “**Add**” button, type the item in the Service box, and then click on “**Save**”. To edit an item, select it and click on “**Edit**”, edit the text, and then click on “**Save**”.

 **Tip:** If you have no use for the Service Type drop-down box, you can make it disappear from the Activities screen by unchecking the Show “Service” list box option in the Activity Screen Options screen.

COURSE COVERAGE

Purpose: To view the tutors, advisors and/or staff that have been assigned activities and to determine to courses that are covered for the various appointment scheduling blocks.

Access: From System Administration, click Sign-in Setup >> Course Coverage.

AccuSQL - Build 19.0.0

X Close **Course Coverage**

Semester: Activity:

Coverage	07 AM	08 AM	09 AM	10 AM	11 AM	12 PM	01 PM	02 PM	03 PM	04 PM	05 PM	06 PM	07 PM	08 PM	09 PM	10 PM	Hours	
Monday			2	2	2	2	1	1	1	2	2	2	1	1			15.0	
Tuesday		1	1	2	2	2	2	2	2	1	1						13.5	
Wednesday		1	1	1	1	1	1		1	1	1	1	1	1			8.0	
Thursday		1	1	2	2	2	2	1	1	2	2	2	1	1	1		14.0	
Friday			1	1	1	1	1		1	1	1	1	1	1			8.0	
Saturday																		
Sunday																		
Total		3	3	8	8	8	8	8	3	3	6	6	8	8	6	5	4	58.5

Tutors (Click on a slot):

By default, you will be viewing the current semester for all activities. If you click on a scheduling block for a particular day of the week and time, you can view the tutors that are scheduled for that block.

The Hours column on the right indicates the cumulative hours for all the tutors that have an schedule with activity assignments for the whole hours that comprise the day of the week.

The Total row at the bottom of each scheduling block indicates the total number of tutors that have an activity assignment and a schedule for that particular whole hour or partial hour scheduling block for the week.

If you click on a number in the scheduling grid, you can view the names of the tutors that have a schedule and at least one activity assignment for the selected block.

You can use the Semester drop-down box to view the coverage for the current semester (the default selection) or if you define semesters in advance (using the System >> Semesters screen) then you can view coverage for upcoming semesters.

If you want to see the coverage for a particular activity, you can click the  button next to the Activity field and then select the activity you want to filter on in the pop-up selection grid. Once selected, then the numbers in the Coverage grid will be based only on that selected activity. Click a value in the grid to see the tutors that are covering the block for the selected activity.

AccuSQL - Build 19.0.0

 Close **Course Coverage**

Semester: Activity: 

Coverage	07 AM	08 AM	09 AM	10 AM	11 AM	12 PM	01 PM	02 PM	03 PM	04 PM	05 PM	06 PM	07 PM	08 PM	09 PM	10 PM	Hours
Monday			1	1	1	1	1	1	1	1	1						8.0
Tuesday		1	1	1	1	1	1	1	1	1	1		1	1	1	1	7.5
Wednesday		1	1	1	1	1	1	1	1	1	1						8.0
Thursday		1	1	1	1	1	1	1	1	1	1						8.0
Friday			1	1	1	1	1	1	1	1	1		1	1	1	1	8.0
Saturday																	
Sunday																	
Total		3	3	5	5	5	5	5	5	5	4		2	2	2	2	39.5

Tutors [Tuesday 10:00 AM]

Basoz, Cetin

SCHEDULE BUILDER

Purpose: To view, edit, save and approve and/or broadcast the tutor, advisor and/or staff schedules that have been submitted for usage as your default semester schedule for appointment scheduling. Schedules that have been submitted by tutor, advisor and/or staff via Web Gateway MVC are populated into this grid as either Available or Preferred blocks. Admins use this screen in order to “convert:” these blocks to Assigned blocks where they are then used as the default “semester” schedule.

Access: From System Administration, click Sign-in Setup >> Schedule Builder.

AccuSQL - Build 19.0.0

Schedule Builder

Close

Select Day: Monday Tuesday Wednesday Thursday Friday Saturday Sunday

Draft for: Fall Semester 2018

Mode: Tutor Activity Tutor Group

Tutor: --All Tutors-- ...

Activity: --All Activities-- ...

Tutor Group: --All Tutors-- ...

Add Assignment Remove Assignment

Resolution (min.): 30

Tutor Name	07 AM	08 AM	09 AM	10 AM	11 AM	12 PM	01 PM	02 PM	03 PM	04 PM	05 PM	06 PM	07 PM	08 PM	09 PM	10 PM	Hours	
Basoz, Cetin	A	A	P	P	X	X	X	X	X	X	A	A	P	P	X	X	X	8.0/39.5
Bright, Cindy			A	A	X	X	X	X	X	X	X	X	X	X	A	A		7.0/19.0
Guzman, Julian			A	A	P	P	P	P	P	P	P	P	P	A	A	A	A	

Tutor Name	07 AM	08 AM	09 AM	10 AM	11 AM	12 PM	01 PM	02 PM	03 PM	04 PM	05 PM	06 PM	07 PM	08 PM	09 PM	10 PM	Hours		
Daily Sessions			2	2	2	2	2	1	1	1	1	2	2	2	2	1	1	15.0	
Weekly Sessions			3	3	8	8	8	8	8	3	3	6	6	8	8	6	5	4	58.5
Weekly Tutors (Count)			1	1	2	2	2	2	2	2	2	2	2	1	1	1	1		

A Available
 P Preferred
 X Assigned

Save Draft
 Use As Default Schedule
 Broadcast Schedule

Select Day: Pick a day of the week to select the schedule for that day. The Tutor display grid will show the schedules for the tutors for the day indicated for the semester selected in the Draft for drop-down display.

Draft for: Select the semester for which you are setting the schedule. By default, the current semester is selected. Using this option, you can set schedules for the current or future semesters. Note: Semesters are defined in the System >> Semesters screen.

Mode: Click a radio button if you want to filter the Tutor display grid based on a particular tutor, activity, or tutor group. Once selected, click the ... button adjacent to the mode selected and then select the tutor, activity, or tutor group you want to filter on in the pop-up selection grid. Once selected, then the numbers in the Tutor display grid will be based only on that selected value.

Add/Remove Assignment: If click the Add Assignment radio button, then when you drag in the Tutor Name display grid you can change A (Available) or P (Preferred) display grid values to X (Assigned) values. If you want to remove X (Assigned) values, click the Remove Assignment radio button, then when you drag in the grid, the values will be converted to their original A (Available) or P (Preferred) as determined in the Tutor Availability (Availability Data) screen, discussed in a moment.

Resolution (min.): To display the Tutor Name display grid in various resolutions, select a value from the drop-down box. The Tutor Name display grid will display the minute increments for each hour in the grid

with the granularity specified. Note: If you select a smaller resolution (20 minutes or less), then you can side scroll in the Tutor Name display grid to view additional hours in the grid display.

Tutor Name (grid): Each tutor will be listed in the grid display. If the background is red, then that tutor does not have any Available or Preferred schedule entered for the day selected. If the background is blue, then the tutor has some availability entered. If you click on a tutor name, then that tutor's record will open in the Tutor Availability (Availability Data) screen (discussed later). Tip: For each tutor you click, the Tutor Availability (Availability Data) screen will open in a new window. Using this method you can work on adding available or preferred availability for numerous tutors at the same time. Of course, then premise is for tutors to create their own availability data by logging into Web Gateway MVC to submit their own schedules via the web, so it would only be necessary for admins to set availability data if they want to adjust the available or preferred times already submitted.

Save Draft: Click Save Draft to save the schedules as you are assigning them. A draft is considered a schedule that has not yet been approved hence the Use as Default Schedule has not yet been clicked.

Use as Default Schedule: Once you are ready to use the schedule, click this button to set the schedule for all tutors. This will become the Regular schedule for all tutors. Tip: You can also look at those schedules by selecting a record in the Tutors screen and then clicking with the Tutor Schedule button or Scheduler (Classic button).

Broadcast Schedule: Click Broadcast Schedule if you want to send the tutors and email with their approved default schedules. To use this feature, you must have the mail server setup in the Control Panel >> Email Settings Options and tutor must also have a emails entered in their Users >> Tutor records.



Warning: Clicking the Use as Default Schedule button will overwrite any Regular schedules that have been created in the Tutors >> Tutor Schedule or Scheduler (Classic) screens. Also, if tutors do not have a schedule entered here, it will completely remove the tutors Regular schedules from those screens.

TUTOR AVAILABILITY

Purpose: To view, edit, and save the tutor, advisor and/or staff regular semester Available or Preferred schedules that have been submitted for usage as your default semester schedule for appointment scheduling. The submitted schedules here are then “converted” to Assigned schedules using the Schedule Builder screen mentioned previously.

Access: From System Administration, click Sign-in Setup >> Tutor Availability.

AccuSQL - Build 19.0.0

Close **Availability Data**

Cetin Basoz

Assignments

Category	Activity ID	Activity
Course Tutoring	ACP400	Advanced C++ Programming
Course Tutoring	ENG405	Software Engineering
Course Tutoring	ICP305	Intro C++ Programming
Course Tutoring	JP4400	Java Programming

E-Mail: Cell: Major:

Pay Type: Pay Rate: Pay method: For Work hours For Appointments

Can tutor serve different activities during a group session?
 Use configuration setting
 Yes, can serve
 No, cannot serve

Max # of students in a group appointment:

Day/Time	07 AM	08 AM	09 AM	10 AM	11 AM	12 PM	01 PM	02 PM	03 PM	04 PM	05 PM	06 PM	07 PM	08 PM	09 PM	10 PM	Hours
Monday	A	A	P	P	P	P	P	P	P	P	P	P	A	A			14.0
Tuesday	A	A	P	P	P	P	P	P	P	P	P	P	A	A			14.0
Wednesday	A	A	P	P	P	P	P	P	P	P	P	P	A	A			14.0
Thursday	A	A	P	P	P	P	P	P	P	P	P	P	A	A			14.0
Friday	A	A	P	P	P	P	P	P	P	P	P	P	A	A			14.0
Saturday																	
Sunday																	

Semester:

Available
 Preferred
 Not Available

When you click a tutor name from the Schedule Builder screen, that tutor’s Availability Data will open. Typically, this data is populated from the tutors themselves using Web Gateway MVC, however you can review the submitted hours and change them as needed as an AccuSQL administrator using this screen.

If you choose to add available hours, preferred hours, or remove availability, click the Available, Preferred or Not Available radio button and then drag in the grid for the days and times for which you are setting that status and then click Save to save the changes. In the following example, an additional block from 7AM to 12:30PM has been added as a Preferred time for the tutor Cindy Bright:

AccuSQL - Build 19.0.0

Availability Data

Cetin Basoz

Assignments

Category	Activity ID	Activity
Course Tutoring	ACP400	Advanced C++ Programming
Course Tutoring	ENG405	Software Engineering
Course Tutoring	ICP305	Intro C++ Programming
Course Tutoring	JP4400	Java Programming

E-Mail: juliang@engineerica.com **Cell:** () - **Major:**

Pay Type: Pro Tutor **Pay Rate:** \$ 10.00 **Pay method:** For Work hours For Appointments

Can tutor serve different activities during a group session?
 Use configuration setting
 Yes, can serve
 No, cannot serve

Max # of students in a group appointment: 0

Day/Time	07 AM	08 AM	09 AM	10 AM	11 AM	12 PM	01 PM	02 PM	03 PM	04 PM	05 PM	06 PM	07 PM	08 PM	09 PM	10 PM	Hours
Monday	A	A	P	P	P	P	P	P	P	P	P	A	A	P	P	P	14.0
Tuesday	A	A	P	P	P	P	P	P	P	P	P	A	A	P	P	P	14.0
Wednesday	A	A	P	P	P	P	P	P	P	P	P	A	A	P	P	P	14.0
Thursday	A	A	P	P	P	P	P	P	P	P	P	A	A	P	P	P	14.0
Friday	A	A	P	P	P	P	P	P	P	P	P	A	A	P	P	P	14.0
Saturday																	
Sunday																	

Semester: Fall Semester 2018

Available
 Preferred
 Not Available

Save **Discard**

After you have modified and saved the availability data for a tutor, then you can finalize that modified schedule back in the Schedule Builder screen for that tutor. The grid will reflect the current status of that time block:

AccuSQL - Build 19.0.0

Schedule Builder

Close

Draft for: Fall Semester 2018

Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday
 Sunday

Mode: Tutor
 Activity
 Tutor Group

Tutor: --All Tutors--
 Activity: --All Activities--
 Tutor Group: --All Tutors--

Add Assignment
 Remove Assignment

Resolution (min.): 30

Tutor Name	07 AM	08 AM	09 AM	10 AM	11 AM	12 PM	01 PM	02 PM	03 PM	04 PM	05 PM	06 PM	07 PM	08 PM	09 PM	10 PM	Hours	
Basoz, Cetin	A	A	P	P	P	P	P	P	A	A	P	P	P	P	P	P	A	A
Bright, Cindy			A	A	P	P	P	P	P	P	P	P	P	P	P	P	A	A
Guzman, Julian																		

Tutor Name	07 AM	08 AM	09 AM	10 AM	11 AM	12 PM	01 PM	02 PM	03 PM	04 PM	05 PM	06 PM	07 PM	08 PM	09 PM	10 PM	Hours
Daily Sessions																	
Weekly Sessions																	
Weekly Tutors (Count)																	

A Available P Preferred X Assigned

Save Draft Use As Default Schedule Broadcast Schedule

And then you can drag in the grid to add that assignment and then either Save Draft if you are still building or Use as Default Schedule if you want to “post” that schedule immediately.

AccuSQL - Build 19.0.0

Schedule Builder

Close

Select Day: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday

Draft for: Fall Semester 2018

Mode: Tutor, Activity, Tutor Group

Tutor: --All Tutors--
Activity: --All Activities--
Tutor Group: --All Tutors--

Add Assignment
 Remove Assignment

Resolution (min.): 30

Tutor Name	07 AM	08 AM	09 AM	10 AM	11 AM	12 PM	01 PM	02 PM	03 PM	04 PM	05 PM	06 PM	07 PM	08 PM	09 PM	10 PM	Hours	
Basoz, Cetin	A	A	P	P	X	X	X	X	X	A	A	P	P	X	X	X	X	8.0/8.0
Bright, Cindy			A	A	P	P	P	P	P	P	P	P	P	A	A	A		
Guzman, Julian																		

Tutor Name	07 AM	08 AM	09 AM	10 AM	11 AM	12 PM	01 PM	02 PM	03 PM	04 PM	05 PM	06 PM	07 PM	08 PM	09 PM	10 PM	Hours
Daily Sessions			1	1	1	1	1	1	1	1	1		1	1	1	1	8.0
Weekly Sessions			1	1	1	1	1	1	1	1	1		1	1	1	1	8.0
Weekly Tutors (Count)			1	1	1	1	1	1	1	1	1		1	1	1	1	

Available
 Preferred
 Assigned

SIGN-IN SETUP OPTIONS

If you click Sign-in Setup from the main System Administration screen, then select Setup, you will be presented with a Control Panel Options view that shows context specific options for your Sign-in Setup screens.

Here are the Control Panel options for Sign-in Setup:

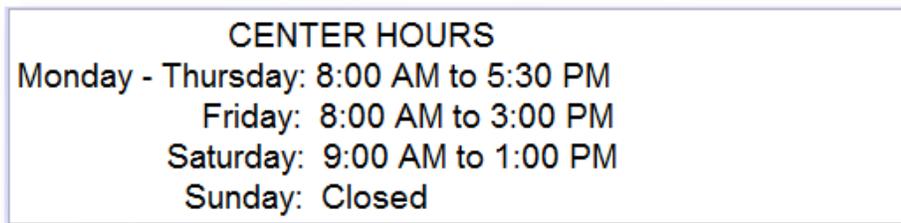
- Welcome Screen Options – Used to configure the welcome message on the main sign in screen, determine which buttons to show on the main sign in screen, and determine if you want the current station to run in Kiosk (full screen) mode or standard mode.
- Activity Screen Options – Used to determine the items that appear when students sign in. Also used limit student activity selections to only the classes they are registered for and to set automatic reports that go out to instructors to send them the center attendance for students in their classes.
- Tutor Selection Screen Options – Used to determine if and when students select a tutor when they come into the center for help..

WELCOME MESSAGE



Use the text box at the top of this page to modify the welcome message that appears at the top of the AccuSQL/AccuTrack sign-in screen. To change the welcome message, simply edit its text.

ANNOUNCEMENTS BOX



Use the announcement box in this screen to change the announcement box that appears in the AccuSQL/AccuTrack Sign-in screen. Use this box to display information such as hours of operation, holiday notices, extended hours during finals week, or anything else you want you want to announce.

To use this box, make sure that the "Show announcements ..." check box is checked. If you uncheck this box, the announcements box will not appear in the Sign-in screen. Use the edit box to enter the announcement. The edit box is the same size as the one in the sign-in screen, so text will appear here exactly the same way it will appear in the sign-in screen. You can control the font size in this edit box by using the drop-down list box labeled "Font Size." By default, the message box has a transparent background. If you would rather have an opaque background, check the "Opaque background" box. The opaque background will make it easier to read the welcome message.

 **Tip:** The message you enter will automatically be centered on the Main Sign-in Screen.

SHOW THESE BUTTONS

Show these buttons:

- Appointments
- Seminar Sign up
- Media Checkouts
- Activity Waiting List
- Exit AccuSQL
- Messaging Center
 - Students can only message tutors
- "Who's In"
 - Students can also see signed-in students
- Run in Kiosk mode (Applies to this station)
- Do not display Online Communities message at Sign In

The show these buttons checkboxes control the display of buttons in the main Sign-in screen. The following is an explanation of these buttons:

- Appointments:** Display this button if you want the students to schedule their own appointments.
- Seminar Sign-up:** Display this button if you want to enable students to register for seminars or workshops via AccuSQL/AccuTrack.
- Media Checkouts:** Display this button if you want students to check media out themselves.
- Activity Waiting List:** Display this button if you want to use the waiting list feature of AccuSQL/AccuTrack.
- Exit AccuSQL/AccuTrack:** Display this button if you want students or other users to have the ability to exit AccuSQL/AccuTrack.
- Messaging Center:** Display this button if you want students to send messages to tutors and possibly to other students.
- Who's In:** Display this button if you want students to check the sign-in status of tutors and/or other students.
- Run in Kiosk mode (Applies to this station).** Check this box if you want the current station to display in full screen mode. In this mode, the main sign in screen of AccuSQL or AccuTrack will take up the entire monitor. Typically, you would set your student sign-in stations to run in Kiosk mode and your admin computers would not.

ACTIVITY SCREEN OPTIONS

To access the Activity Screen Setup options, click Sign-in Setup in System Administration, then the Setup tab. In the Sign-in Setup screen, click on Activity Screen Options on the left side of the screen.

REMOVING THE ACTIVITIES SELECTION SCREEN ENTIRELY

If you don't need to track the activities at your center, check the "Do not show the Activity selection screen during sign-in" box. This is useful if you only want to track student's sign-in and sign-out time without tracking the reason for their visit.

LABELS BOX

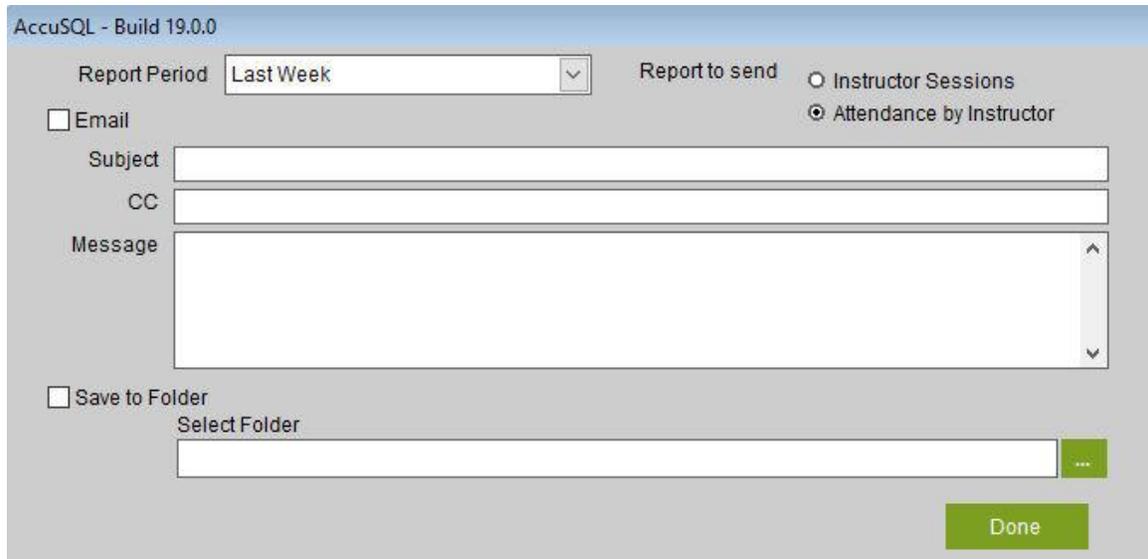
The top text box allows you to specify the title of the Activities screen. The second text box allows you to enter a line of instructions to users. This line appears under the screen’s title. The third text box allows you to change the label of the Category box (e.g. Category, Subject, etc.), and the fourth text box allows you to change the label of the activity box (e.g. Service, Class, Section, etc.).

Show Instructors box: Check this check box to show the instructors in the Activity Selection screen. Displaying the instructor in the Activities box is useful in making activities more identifiable to the students. It is also used if you want to send scheduled attendance reports to instructors.

 **Tip:** If you did not assign instructors to activities, clear this check box.

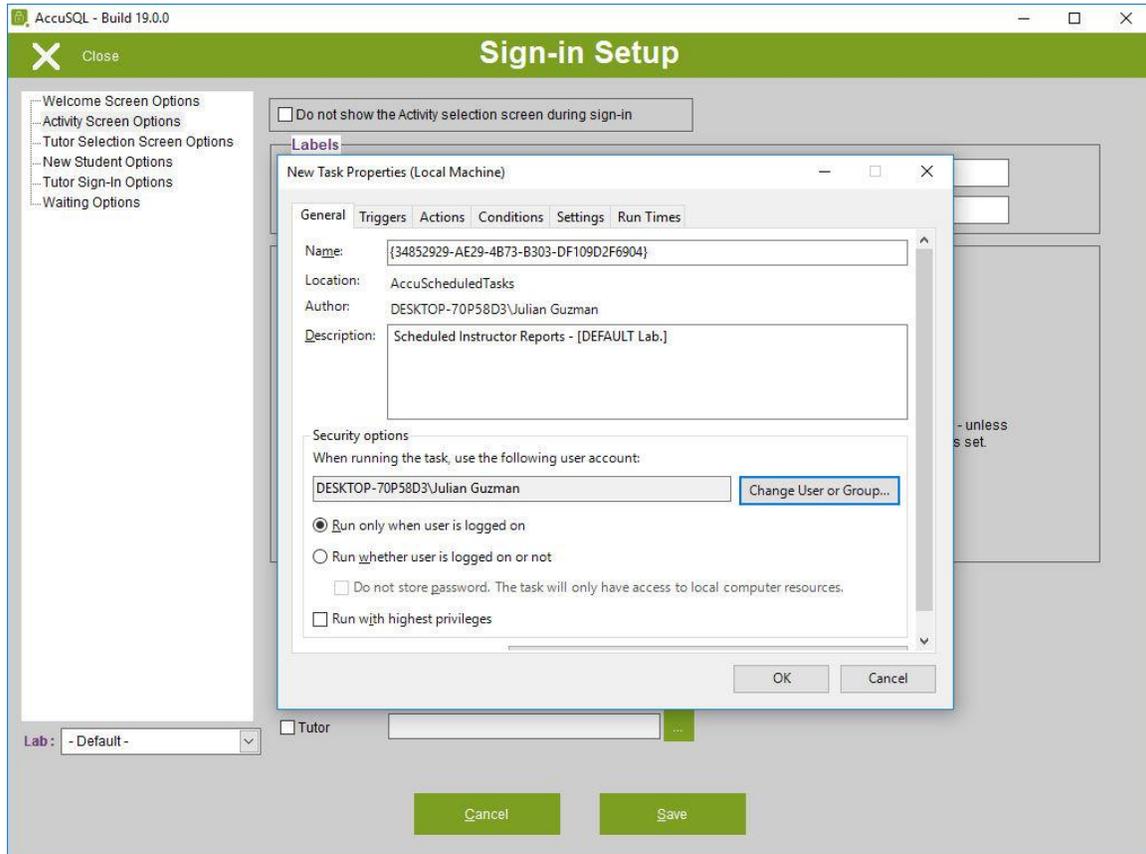
Instructor selection is required: Check this box if you are showing the instructor selection box and you want the student to select an instructor before being able to proceed with the sign in.

Ask student whether to report session to instructor: Check this box if you want students to have the choice to report their center visits to their instructors. An attendance report will be generated and emailed to the instructor. You can configure the schedule for the instructor’s attendance report from this screen by clicking the Set Reports Schedule button.



The screenshot shows the 'AccuSQL - Build 19.0.0' interface. At the top, there is a 'Report Period' dropdown menu set to 'Last Week'. To the right, under 'Report to send', there are two radio buttons: 'Instructor Sessions' (unselected) and 'Attendance by Instructor' (selected). Below this, there is an 'Email' checkbox (unchecked). Under 'Email', there are three text input fields: 'Subject', 'CC', and 'Message'. At the bottom left, there is a 'Save to Folder' checkbox (unchecked) and a 'Select Folder' text input field with a dropdown arrow icon. A green 'Done' button is located at the bottom right of the form.

Click done when you have completed the configuration in the screenshot above, and you will be taken to the Windows Task Scheduler screen to create the task. After the task is created, you can go through the AccuTask Scheduler feature to edit the task or look at the logs for that task. AccuTask Scheduler will be discussed later in this reference manual.



Tip: Instructors are typically the professors that teach a particular course and one or more of them can be tied to each course in the Sign-in Setup >> Categories & Activities screen. The student picks their instructor at sign in to that course and then the instructors are emailed an instructor attendance report based on the students that picked them. If you want to use this feature, each instructor needs to have a valid email address in the Instructors setup screen.

Show Service list box: Check this box if you want to display the “Service” selection box at sign-in. The Service selection can be used to collect more information regarding the visit.

Service selection is required: Check this box if you are showing the service selection and want to force the student to select a service type.

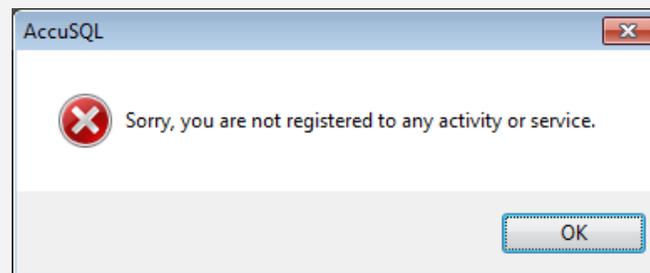
Note: To enter items appearing in the service type selection box, use the “Service” screen

which is accessible via the Sign-in Setup >> Service screen.

Only show registered activities in the Activities screen: Use this check box to only show activities (classes) students are registered for at sign-in. If this option is turned on, when a student signs in she will only see registered classes in the Activity Selection screen.

 **Tip:** If you did not import student registration information, clear this check box.

 **Note:** When this option is selected, students that are not registered to any classes will not be able to sign in. Instead, the student will see an informational message like this one:



You can also set activities to “Global registration” in the Sign-in Setup >> Categories & Activities screen. If you select the Global registration checkbox for an activity, then all students can select that activity at sign in whether they are registered or not.

Do not automatically register students for activities they are signed into: If this box is left unchecked, then when students signs into activities, they are automatically registered for those activities. This can be handy if you want students to build their own registered activities list. If you are controlling the registrations from a registration import, then you can disable auto-registrations by checking this box.

Retrieve the following data from last visit:

Category and Activity: Loads the category and activity used during the last visit and automatically highlights them. This speeds up the sign-in process for returning students who are using the same activity.

Instructor: Loads the instructor selected during the last visit and automatically highlights it.

Service: Loads the service type used during the last visit and automatically highlights it.

Lock the selection on Sign in for:

These options are used to lock the sign-in selection for a specific category, activity, instructor, and/or service. Users can also lock the tutor assigned at sign-in. When locked, only the option indicated will display on the sign in screen, and the option will be locked so it cannot be changed. To lock a particular item, first click the checkbox next to the item you are locking and then click the ... button next to the item and a pop-up box will appear.

Lock the selection on Sign In for:

<input type="checkbox"/> Category	<input type="text"/>	...	Note: Implicitly locks related category.
<input type="checkbox"/> Activity	<input type="text"/>	...	
<input type="checkbox"/> Instructor	<input type="text"/>	...	
<input type="checkbox"/> ServiceType	<input type="text"/>	...	
<input type="checkbox"/> Tutor	<input type="text"/>	...	

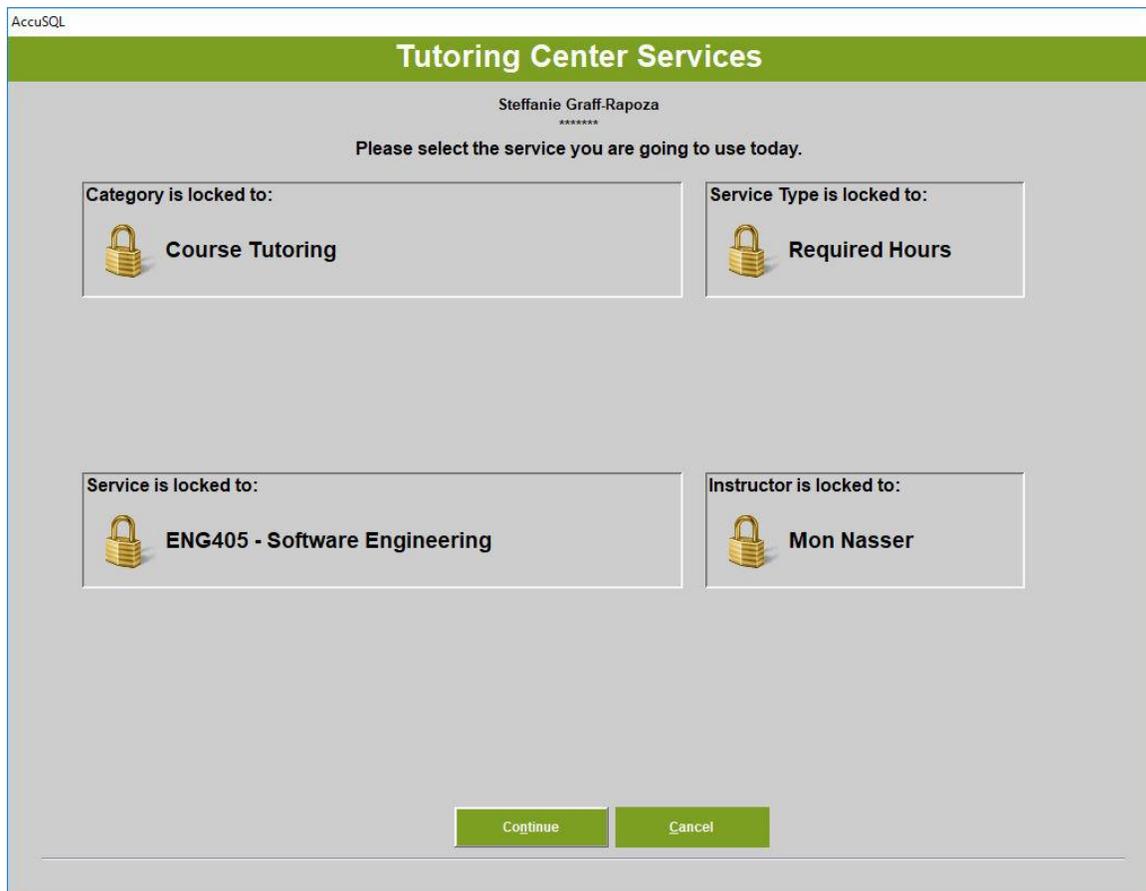
Now click the item you want to lock to and click OK. You can lock any combination of items using the same method.

AccuSQL - Build 19.0.0

Activity ID	Activity	Category
	Academic Use	Computer Use
	Adv Appt	Advising
	Career Placement	Advising
	Degree Audit	Advising
	Grad Check	Advising
	Graduation Meeting	Advising
	New Student	Advising
	Non-Academic Use	Computer Use
ACP400	Advanced C++ Programming	Course Tutoring
ACP400	Advanced C++ Programming	Success Center
ALG301	Algebra 1	Course Tutoring
ALG301	Algebra 1	Math Tutoring
ALG301	Algebra 1	Success Center
ALG302	Algebra 2	Course Tutoring
ALG302	Algebra 2	Math Tutoring
ALG302	Algebra 2	Success Center
CAL401	Calculus	Course Tutoring
CAL401	Calculus	Math Tutoring
CAL401	Calculus	Success Center
ENG405	Software Engineering	Course Tutoring

OK

When a student signs in, they will see a lock on the items you have indicated as such.



TUTOR SELECTION SCREEN OPTIONS

To access the Tutor Selection Screen Setup options, click Sign-in Setup in System Administration, then the Setup tab. In the Sign-in Setup screen, click on Tutor Selection Screen Options on the left side of the screen.

The first three options control the display of the Tutor Selection screen.

- Show Tutor Selection screen at sign-in
- Show Tutor Selection screen at sign-out only
- Do not show Tutor Selection screen (unless feedback on tutor is set)

Select the **first** option if you want the Tutor Selection screen to appear after the Activity Selection screen during the student’s sign-in. Select the **second** option if you want to show the Tutor Selection screen when students sign out (useful if students only know who the tutor was after the session). Select the **last** option if you do not wish to show the Tutor Selection screen (i.e. you do not want to track which tutor the students met with).

If you do decide to show the Tutor Selection list, you can control other options:

Add “None” as an option to the tutor list: With this option selected, AccuSQL/AccuTrack will add “None” and also “Unknown” to the tutor’s list. This is useful if some students don’t meet with tutors.

Do not show activities that do not have an assigned tutor: If this option is selected, AccuSQL/AccuTrack will only show activities that have associated tutors. Activities that don’t have associated tutors will not be displayed in the Activity Selection screen.

Tutor selection lists all tutors assigned to an activity regardless of the availability: Check this box to show all tutors regardless of their tutor schedules. Tutors will be displayed in this case strictly based on their activity assignments.

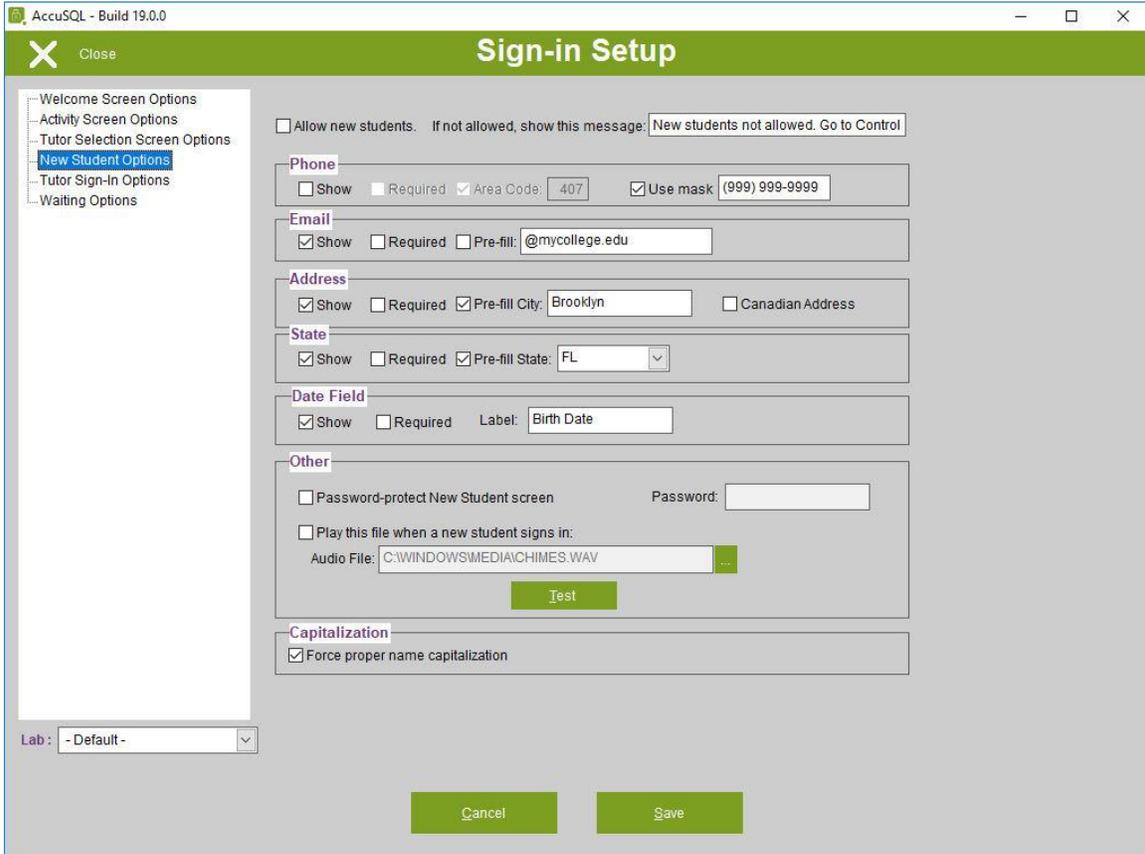
Screen Title: Enter the title for the Tutor Selection screen here.

Instructions: You can change the instructions line in the Tutor Selection screen here.

Email tutor when a student signs in to see him: Tutors will receive an email at the time a student selects him or her during the sign-in process.

NEW STUDENT SCREEN OPTIONS

To access the New Student Setup options, click Sign-in Setup in System Administration, then the Setup tab. In the Sign-in Setup screen, click on New Student Options on the left side of the screen.



Allow new students: Check this box if you want students who are not already in the AccuSQL/AccuTrack database to be able to sign in. If this option is not checked, you can enter the message that AccuSQL/AccuTrack will display when a new student tries to sign in the Visit Tracking Module Options screen.

Phone:

Show: Check to show the phone box. Required: Check if you want to require students to enter their phone number. Area Code: Enter the default area code here. If you like, you can also change the phone mask from the default US format. This is useful if you are in a country outside of the U.S. **Note:** When importing data into the phone fields, you should not have any phone formatting in the import file (just numbers) since AccuSQL/AccuTrack will add the mask itself.

Email:

Show: Check to show the email box. Required: Check if you want to require students to enter their Email address. Pre-fill: You can put the common email address here (e.g. @yourcollege.edu).

Address:

Show: Check to show the address box. Required: Check if you want to require students to enter their address. Pre-fill City: Enter a default city. Canadian Address: Check if you want to show Canadian provinces instead of US states.

State: Show: Check to show the state drop-down. Required: Check if you want to require students to select a state. Pre-fill State: Select the default state from the drop-down.

Date Field:

Show: Check to show a date entry box in the *New Student* screen. Required: Check if you want to require students to enter a date. Label: Enter the label of the date box (e.g. Birth date or Grad date).

Password-protect New Student screen: Turn this option on if you want to control the addition of new students to the AccuSQL/AccuTrack database. If this option is on, when a new student signs in, AccuSQL/AccuTrack will display a password entry box. If the correct password is entered, then the New Student screen will be displayed and the student will be able to proceed. This feature is useful if you want to approve the addition of new students after verifying they are eligible for your services. You can have one of your staff members verify the student and then enter the password to allow the sign-in. If this option is enabled, you can enter the password in the *Password* text box.

Play this file when a new student signs in:

Use this box if you want AccuSQL/AccuTrack to flag new students by playing a sound file when they first sign in. Use the Audio File entry box to type the path and name of the sound file. You can also use the browse “...” button to select the file. To test the sounds file, click the Test button.

 **Note:** The sound file must be in wave (.WAV) format. Use this feature to alert you when new users sign-in. This is useful if you offer first-time users special assistance or instructions.

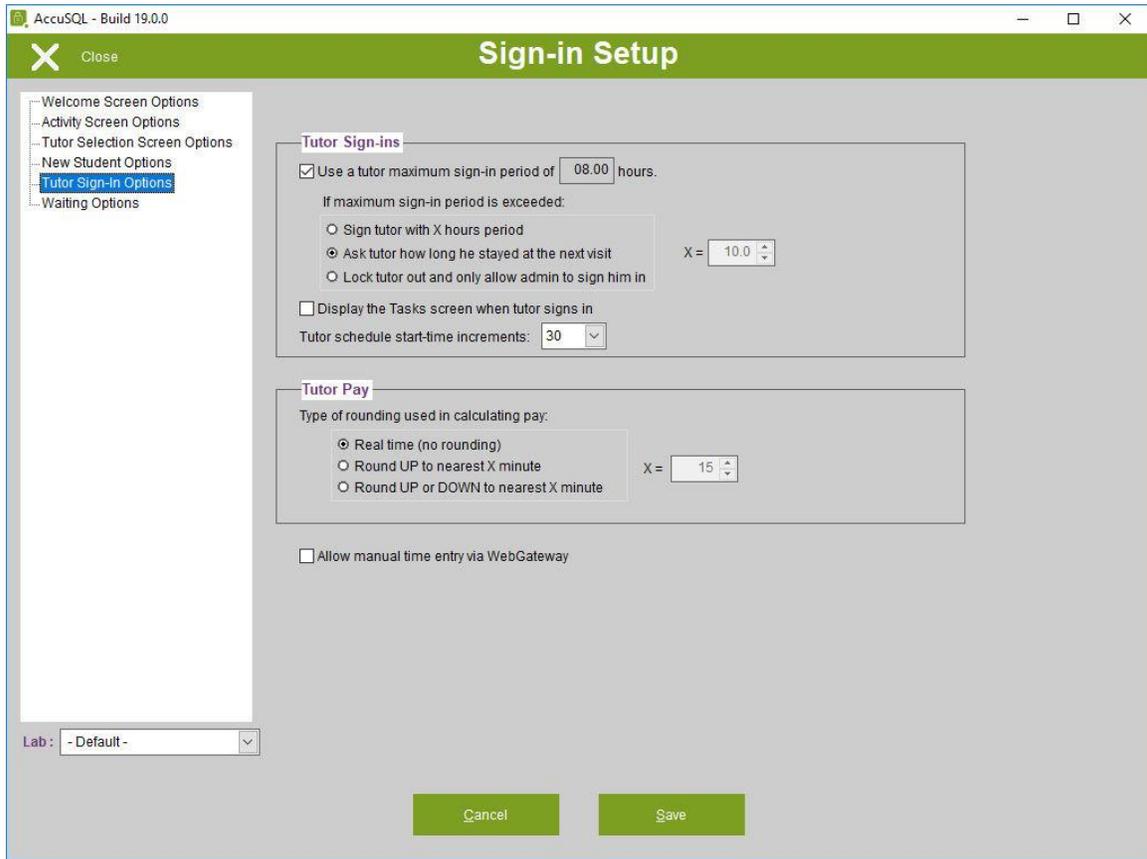
If you have the play function enabled, AccuSQL/AccuTrack will play the selected sound file when the user clicks on "Next" in the New Student screen.

CAPITALIZATION

Force Proper Name Capitalization: Check this box if you want AccuSQL/AccuTrack to automatically convert names entered in the New Student screen to proper format (first letter upper case, and the rest in lower case).

TUTOR SIGN-IN OPTIONS

To access the Tutor Sign-in Setup options, click Users in System Administration, then the Setup tab in the bottom right of the screen. Now click on Tutor Sign-in Options on the left side of the Options menu to select it.



If you track your tutor works hours, use this screen to control the tutor sign-in options:

Use a tutor maximum sign-in period of X hours: Use this option to enter the maximum sign-in period for tutors. Next use the radio buttons to determine what happens when this maximum sign-in period is exceeded:

- Sign tutor with X hour period: Choose this option if you want tutors who exceed the maximum sign-in period to get signed out with X sign-in period. Set X to whatever you like using the X= spinner box.
- Ask tutor how long he stayed at the next visit: Choose this option to have AccuSQL/AccuTrack ask the tutor at the next visit to enter the sign-in period for the previous visit in which the maximum sign-in period was exceeded.
- Lock tutor out and only allow admin to sign him in: Choose this option for maximum control over the accuracy of the sign-in records. With this option selected, when a tutor exceeds the

maximum sign-in period AccuSQL/AccuTrack will lock the tutor out. To unlock the tutor's record, the tutor must be signed out via the Tutor Visits Tracking >> Sign Out screen.

Display the Tasks screen when tutor sign in: Check this box if you want to track what tutors do with their work time. If you only want to track the sign-in and sign-out times, uncheck this box.

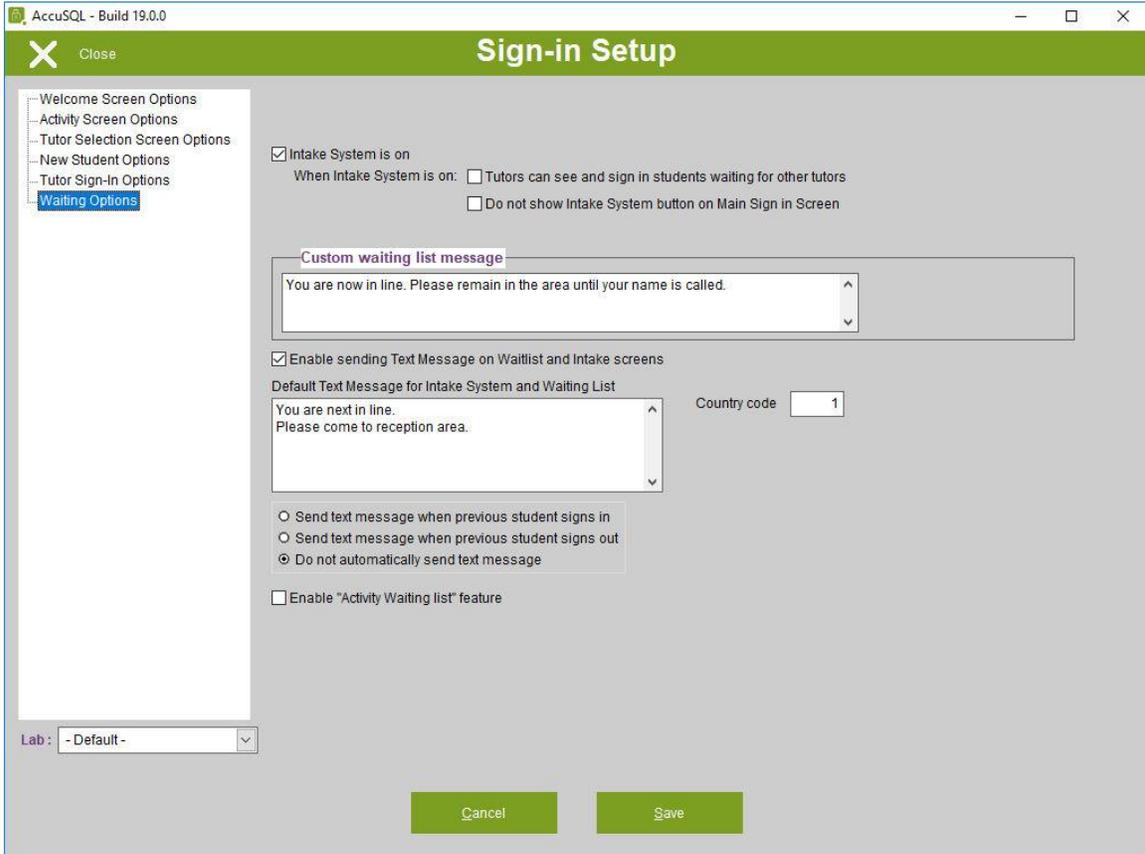
 **Note:** If you use this option, make sure to enter the staff Tasks via the Tutor Visits Tracking >> Tasks screen. If you enable the Tasks screen at sign in, but have not created the tasks the tutors would select at sign-in, you will get a "no tasks defined" message.

Tutor schedule start increment: Use the drop-down box to select the increment of the list box used to enter the tutor's schedule. For example, if you use "30", then the tutor's schedule can start and end at 8:00, 8:30, 9:00, and so on.

Tutor Pay rounding: Use this box to determine the rounding rules when calculating the tutor's pay. Rounding is applied to each session and not to the accumulated time. Select the first option if you do not want to do any rounding. Select the second option if you want to round the time up (e.g. if X=15, 47 minutes are counted as one hour for pay purposes). Select the third option if you want to round up or down to the nearest X minutes (e.g. if X=15, 47 minutes are counted as 45 minutes, while 53 minutes are counted as 60 minutes).

WAITING OPTIONS

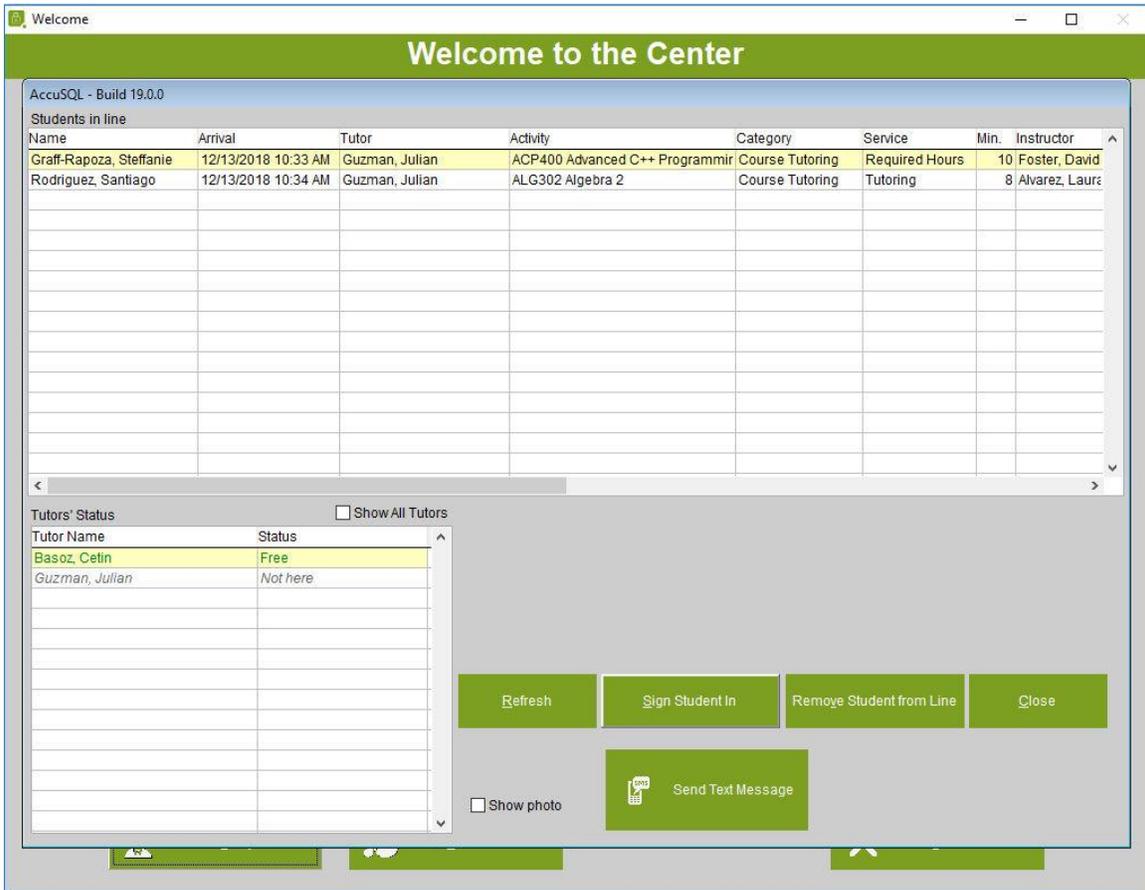
To access the Waiting Options Setup options, click Users in System Administration, then the Setup tab in the bottom right of the screen. Now click on Waiting Options on the left side of the menu to select it.



Intake System is on: Check this box if you want visitors to go on to a waiting list (intake system) before being signed in with the tutor or advisor. Either intake system admins or tutors/advisors can then sign students in from the intake queue when they are ready to see the student.



Tutors can see and sign in students waiting for other tutors: If you enable the intake system, then you can check this box so tutors can see student waiting for other tutors. Tutors control the student sign-ins through the Students in Line option on their Tutor Pad. Using this option, the tutors can see and then sign in students waiting not only for them, but students waiting for any tutor.



Tip: If you select the “Tutors can see and sign in students waiting for other tutors” option, then you can disable tutor selection by students completely if so desired. So the student would select a category/activity, but not a tutor. Then any available tutor could “pick the student off the list” to sign the student in with him or her.

Do not show the Intake System button on the Main Sign in Screen: If you want to use the Intake System, but you do not want students to be able to access it, check this box. This can be useful if students are signing into “sensitive” activities, for example academic probation or health services and you do not want other students to see what the others are waiting for.

Custom waiting list message: Enter the message that will be displayed when the student signs in, indicating they are in line waiting to be seen.

Enable sending Text Message on Waitlist and Intake screens: Check this box if you would like to send text messages from either the Activity Waiting List or Intake System in AccuSQL/AccuTrack. If you select this option, you can customize the message that will be sent in the edit box. If you are in the U.S. you would leave the country code as 1. Using this method, the students will receive a text message on their cell phones when they are ready to be helped.

 **Note:** For this feature to work, you will need to configure text messaging in the Communications >> Setup >> Text Messaging Configuration screen. Students will also need to have their cell phone number entered in their student records.

Enable Activity Waiting list feature: Check this box if you want to restrict the number of students signing into a certain activity. The number of students that can be in the activity at any one time is controlled by the Max Students field value entered for the activity in the Sign-in Setup >> Categories & Activities screen.

 **Tip:** The Intake System will place all students signing in into a waiting list where they are then signed in by staff members as they are ready to see them. The Activity Waiting List allows you to control how many students are allowed to be signed into any one activity at the same time.

STUDENT VISITS TRACKING

When you click on Student Visits Tracking from the Main Menu, you will see the following options:

- Who's In: See who is currently signed into AccuSQL/AccuTrack.
- Sign In: Used to manually sign students in.
- Sign Out: Used to manually sign students out.
- Edit Sign-in Logs: To view and edit the student sign-ins that have been recorded in the system.
- Activities Waiting List: If enabled, allows you to sign students in who are waiting for an open slot for a particular activity.

WHO'S IN SCREEN

Purpose: Check which students and tutors are currently signed in

Access: From System Administration >> Students Visits Tracking, click on “Who’s In”.

Name	ID	Date In	Time In	Activity	Category	Tutor
Conner, Jenelle	7777777	12/13/2018	11:56 AM	ENG405 - Software Engineering	Course Tutoring	Guzman, Julian
Crabtree, Sarah	5555555	12/13/2018	11:26 AM	ALG302 - Algebra 2	Math Tutoring	
Thongpaen, Tawan	8888888	12/13/2018	11:57 AM	CAL401 - Calculus	Math Tutoring	
Torres, Julia	6666666	12/13/2018	11:55 AM	Academic Use	Computer Use	

The *SuperTable* in the screen lists signed in users in **alphabetical** order by last name. For each user, you will see the date and time of the sign in and the activity, tutor, etc. You can sort the list by clicking on and of the header columns. You can also right click on the grid (as you can with any SuperTable). To filter on certain values, export the data directly to Excel, etc.

Click the Tutors radio button to toggle to signed-in tutors.

To see a list of users who are signed out, click on the “**Show Out**” button.

If you have student and tutor photos loaded, you can click the Show pictures checkbox to see a photo of the student or tutor you currently have selected in the list.

 **Tip:** You can make the “Who’s In” screen accessible to students by selecting the “Who’s In” checkbox in the Sign-in Setup >> Setup >> Welcome Screen Options screen. You can also set this up

so students can only see the sign-in status of tutors and not other students.

SIGN IN (STUDENTS) SCREEN

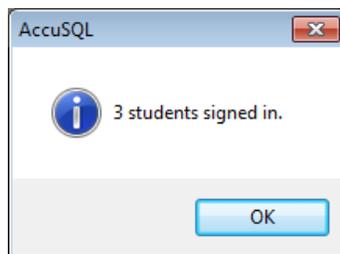
Purpose: To manually sign students into AccuSQL/AccuTrack.

Access: From System Administration, click Student Visits Tracking >> Sign In.

This option might be needed if a student forgot to sign in, couldn't sign-in because the system was off line, or because the tutoring session took place outside of the center. It would also be used if you do not have students sign themselves in, but prefer to sign them in yourself. Here are the steps for manually signing a student in:

1. Select the category from the "Category" drop-down box.
2. Select the activity from the "Activity" drop-down box. By default, AccuSQL/AccuTrack will display the students registered for the selected activity. If you want to see all students, uncheck the Show registered students only checkbox.
3. (Optional) Select the tutor from the "Tutor" drop-down box.
4. (Optional) Select the instructor from the "Instructor" drop-down box.

5. (Optional) Select the service type from the “Service” drop-down box.
6. Enter the sign-in date and time. By default, it displays the current date and time when the screen was opened.
7. Select the student or students using the *Selection List Boxes control*.
8. (Optional) If you want to sign student **in and out**, check the box “Give a sign-in period of” and enter the sign-in period using the hour and minute spinner boxes. By default, this option is selected and set to credit the student with a one our period.®
9. Click on “Sign In”. You will see a confirmation message:



 **Tip:** When you launch this screen, the date and time box will show current date and time. If you want to sign students in at a different time, then change the values in this text box. You can do this by typing values in, or you can use the Calendar by clicking on the box with the right mouse button.

 **Tip:** You can also filter the students to sign-in to a certain group of students. This is helpful if for example you have a certain group of students that you need to periodically sign in via the Sign In Students screen. To do this, first check the “Student Groups” checkbox, click on “Set Filter”, and then select the group (or groups). Next click on the “Select students from these groups only” button. The students in the group(s) you selected will automatically be added to the Selected Students list.



ROUND-TRIP SIGN-INS

The Sign Student In screen has a check box to enable signing the student in and out at the same time. This feature is useful for entering visits from a sign-in sheet or off-site meetings for example.

To use this feature, check the box “Give a sign-in period of” and enter the sign-in period.



(To sign in and out)

Give a sign-in period of:

Hours Mins.

1 30

The screenshot shows a user interface element for setting a sign-in period. It features a checked checkbox labeled "Give a sign-in period of:". Below this, there are two spinner controls: "Hours" with the value "1" and "Mins." with the value "30". The entire control set is enclosed in a light gray box.

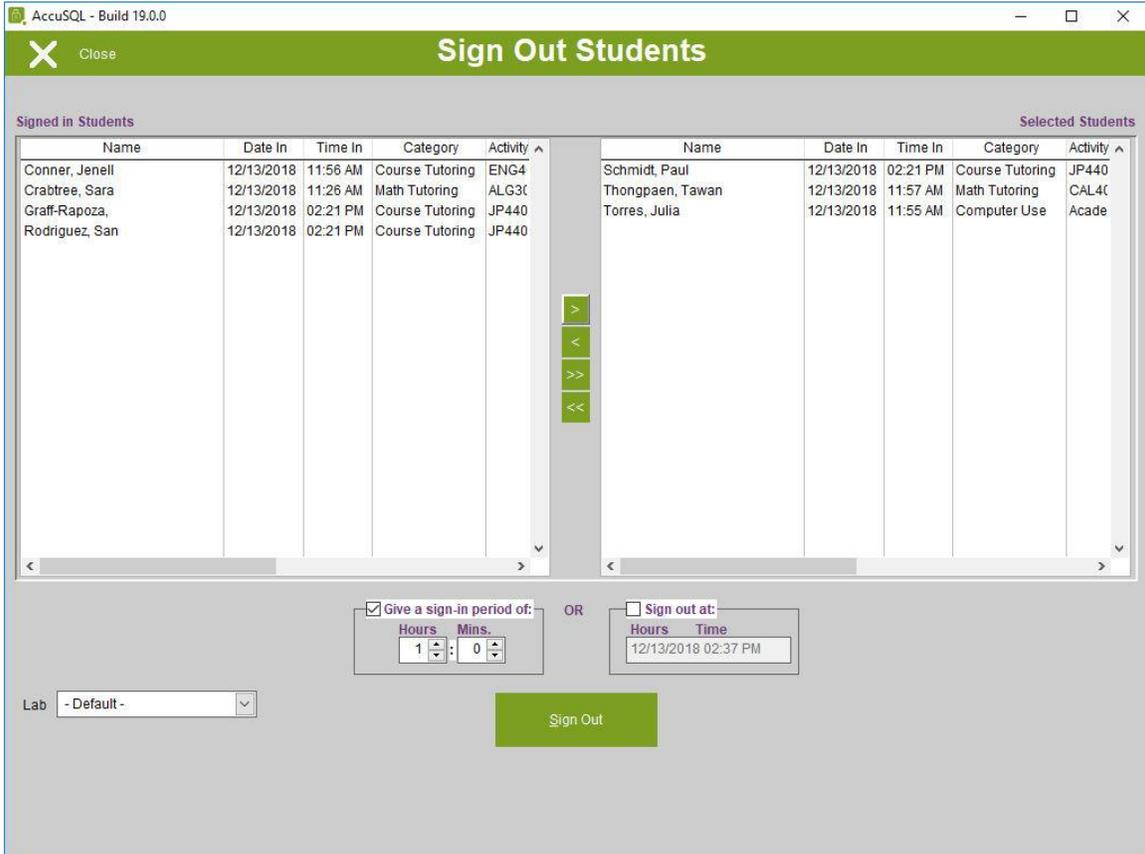
 **Tip:** The Sign Student In screen uses a *SuperTable* control to show the lists of students. This means you can zoom in on a name by typing it in the list.

 **Note:** The screen has a drop-down filter at the top to restrict the view to students using a certain lab.

SIGN STUDENTS OUT SCREEN

Purpose: To manually sign students out.

Access: From System Administration, click on Student Visit Tracking >> Sign Out.



On some occasions, you may want to manually sign students out. This might be because a student forgot or neglected to sign out, or because its closing time and you want to sign everyone out quickly.

The list box on the left is labeled “**Signed in Students**” and displays the names, sign-in dates, and sign-in times of all students who are currently signed in. The list box on the right is labeled “**Selected Students**,” and lists the students you have selected to sign-out. This list box will be empty when you first access this screen.

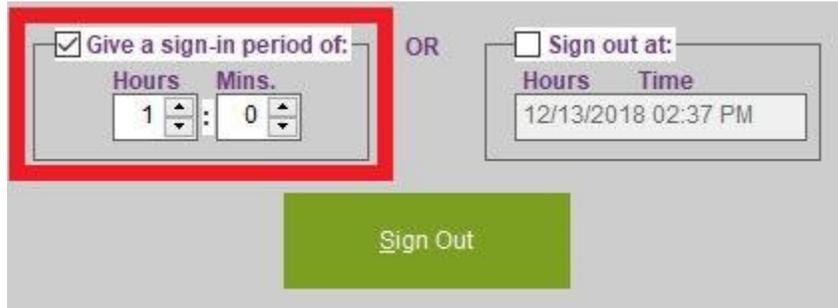
To sign students out, follow these steps:

1. Select the students using the list boxes and the mover buttons.
2. Select the sign-in period to give to the selected students **or** select the sign-out time.
3. Click on the “Sign Out” button.

When the sign out process is completed, a confirmation message appears:



Tip: Use the spinner boxes to specify the sign-in period to be given to each person. For example, you can give each person a one hour and 30 minute sign-in time by first checking the "Give a sign-in period of" check box and then entering '1' in the hours box and '30' in the minutes box



Tip: You can also select to enter the sign-out time for each person. To do this, first check the "Sign out at" check box, and then enter the desired sign-out time. You can enter the time by typing the value in or by clicking on the box with the right mouse button and using the calendar.



Important: When you sign a student out and the sign out date/time you specify is in the future, the student will remain in the Signed in Students side of the screen until that date/time is reached and then they will automatically be removed from the Sign in Students display list. So for example, if you give the student a sign in period of 1 hour and it is currently 10AM, that student will remain in the Sign in Students list until 11AM.

In the Sign Out screen of System Administration, you can now filter students by the currently lab they are signed into in order to sign one or more of them out from that lab. And if you select the – Default – lab, then you can view all students signed into all labs:

Signed in Students

Name	Date In	Time In	Category	Activity
Conner, Jenelle	12/13/2018	11:56 AM	Course Tutoring	ENG4I
Crabtree, Sarah	12/13/2018	11:26 AM	Math Tutoring	ALG3C
Graff-Rapoza, St	12/13/2018	02:21 PM	Course Tutoring	JP440
Rodriguez, Santi	12/13/2018	02:21 PM	Course Tutoring	JP440
Schmidt, Paul	12/13/2018	02:21 PM	Course Tutoring	JP440

Selected Students

Name	Date In	Time In	Category	Activity
Thongpaen, Tawan	12/13/2018	11:57 AM	Math Tutoring	CAL4C
Torres, Julia	12/13/2018	11:55 AM	Computer Use	Acade

Give a sign-in period of: **Hours** **Mins.** 1 : 0
 OR Sign out at: **Hours** **Time** 12/13/2018 02:37 PM

Lab: - Default -
 - Default - | DEFAULT
 Advising Office | ADV LAB
 Computer Lab 1 | COMP LAB
 I don't Know | APC
 Library | LIBR
 Mathematics Center | MATH
 Music Room | MUSIC

Sign Out

EDIT (STUDENT) SIGN-IN LOGS SCREEN

Purpose: To edit student sign-in records.

Access: From System Administration, click on Student Visits Tracking >>Edit Sign-in Logs.

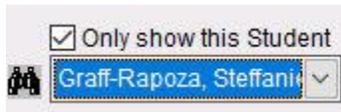
Student	ID	Sign-in Time	Sign-out Time	Period (hrs)	Activity
Blodgett, Chadd	9999999	09/11/2018 01:45 PM	09/11/2018 04:46 PM	3.01	ICP305 - Intro C++ Programn
Blodgett, Chadd	9999999	09/26/2018 04:18 PM	09/26/2018 05:18 PM	1.00	JP4400 - Java Programming
Conner, Jenelle	7777777	09/11/2018 11:50 AM	09/11/2018 01:48 PM	1.98	ALG302 - Algebra 2
Conner, Jenelle	7777777	09/26/2018 01:18 PM	09/26/2018 04:17 PM	2.98	ALG302 - Algebra 2
Conner, Jenelle	7777777	11/16/2018 02:39 PM	11/16/2018 03:40 PM	1.01	Academic Use
Conner, Jenelle	7777777	11/19/2018 08:14 AM	11/20/2018 08:54 AM	24.67	
Conner, Jenelle	7777777	12/13/2018 11:56 AM		0.00	ENG405 - Software Engineer
Crabtree, Sarah	5555555	09/11/2018 11:50 AM	09/11/2018 05:50 PM	6.00	ALG302 - Algebra 2
Crabtree, Sarah	5555555	09/26/2018 01:17 PM	09/26/2018 01:19 PM	0.02	ALG302 - Algebra 2
Crabtree, Sarah	5555555	09/26/2018 01:19 PM	09/26/2018 01:48 PM	0.48	ALG302 - Algebra 2
Crabtree, Sarah	5555555	09/26/2018 01:48 PM	09/26/2018 01:49 PM	0.01	ALG302 - Algebra 2
Crabtree, Sarah	5555555	11/16/2018 02:23 PM	11/20/2018 08:54 AM	90.51	ALG302 - Algebra 2
Crabtree, Sarah	5555555	12/10/2018 01:41 PM	12/10/2018 05:29 PM	3.80	ALG302 - Algebra 2
Crabtree, Sarah	5555555	12/13/2018 11:26 AM		0.00	ALG302 - Algebra 2
Graff-Rapoza, Steffanie	3333333	09/11/2018 11:46 AM	09/11/2018 01:48 PM	2.03	ALG301 - Algebra 1
Graff-Rapoza, Steffanie	3333333	09/14/2018 12:42 PM	09/14/2018 01:45 PM	1.05	ALG301 - Algebra 1
Graff-Rapoza, Steffanie	3333333	09/14/2018 12:45 PM	09/14/2018 01:45 PM	1.00	ALG301 - Algebra 1
Graff-Rapoza, Steffanie	3333333	09/14/2018 12:50 PM	09/14/2018 02:17 PM	1.45	ALG301 - Algebra 1
Graff-Rapoza, Steffanie	3333333	09/26/2018 04:16 PM	09/26/2018 04:19 PM	0.04	ENG405 - Software Engineer
Graff-Rapoza, Steffanie	3333333	09/26/2018 04:40 PM	09/26/2018 04:41 PM	0.02	ENG405 - Software Engineer
Graff-Rapoza, Steffanie	3333333	09/26/2018 04:42 PM	09/26/2018 04:42 PM	0.00	ENG405 - Software Engineer
Graff-Rapoza, Steffanie	3333333	09/27/2018 05:23 PM	09/27/2018 08:23 PM	3.01	ENG405 - Software Engineer
Graff-Rapoza, Steffanie	3333333	09/28/2018 01:55 PM	09/28/2018 04:56 PM	3.01	ENG405 - Software Engineer
Graff-Rapoza, Steffanie	3333333	10/02/2018 05:36 PM	10/02/2018 08:36 PM	3.01	ENG405 - Software Engineer
Graff-Rapoza, Steffanie	3333333	10/04/2018 05:35 PM	10/04/2018 08:36 PM	3.01	ENG405 - Software Engineer
Graff-Rapoza, Steffanie	3333333	10/25/2018 12:02 PM	10/25/2018 12:03 PM	0.01	ENG405 - Software Engineer
Graff-Rapoza, Steffanie	3333333	11/07/2018 04:35 PM	11/07/2018 04:35 PM	0.01	ENG405 - Software Engineer
Graff-Rapoza, Steffanie	3333333	11/09/2018 09:42 AM	11/09/2018 09:49 AM	0.11	ALG301 - Algebra 1
Graff-Rapoza, Steffanie	3333333	11/09/2018 09:52 AM	11/09/2018 09:52 AM	0.01	ENG405 - Software Engineer
Graff-Rapoza, Steffanie	3333333	11/14/2018 11:30 AM	11/14/2018 12:09 PM	0.64	ENG405 - Software Engineer

On some occasions you may need to edit the sign-in logs. This might be because the student selected the wrong class or tutor during the sign-in. AccuSQL/AccuTrack provides you with a powerful tool for editing the records as necessary.

The *SuperTable* in this screen displays the student, sign-in time, sign-out time, sign-in period, activity, and category for each sign-in record. Use the horizontal scroll bar to see all the columns.

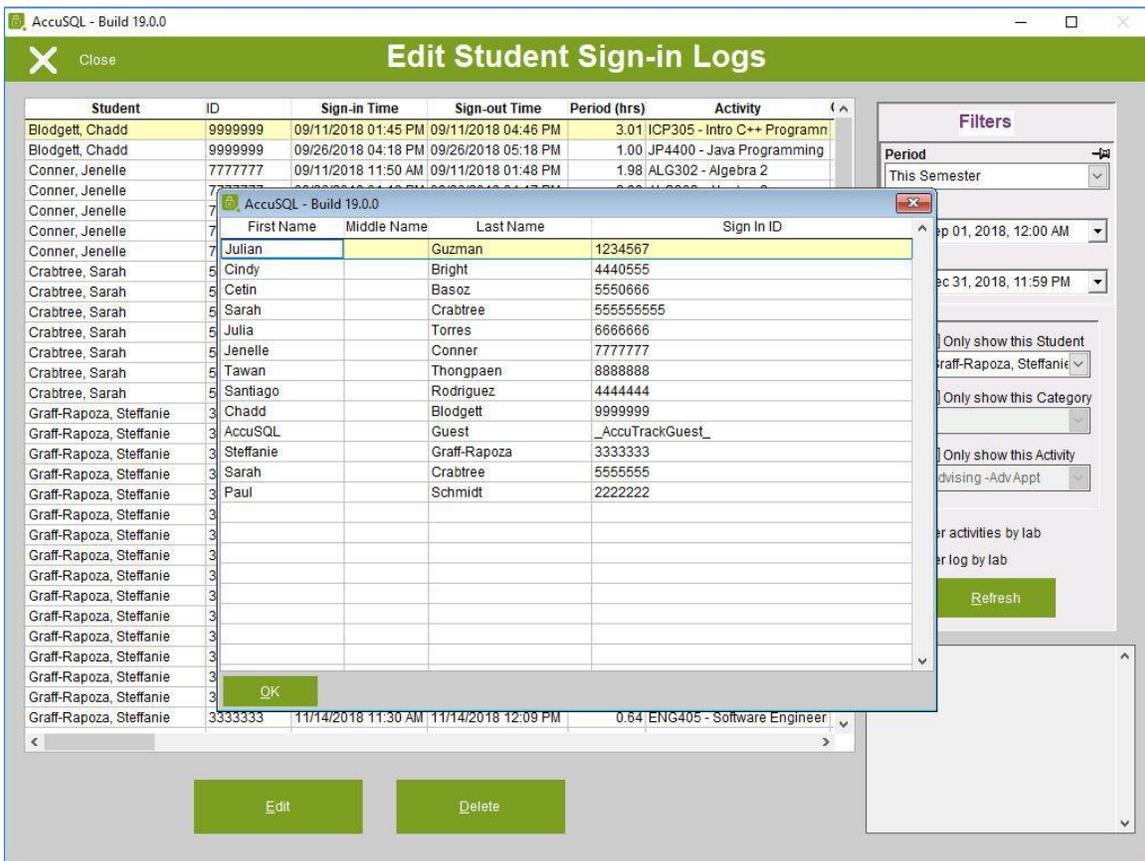
FINDING THE RECORD

You can use the filters or combinations of filters on the right side of the screen to find the record you want to change. Start by restricting the viewed records to a certain time period by entering the “From” and “To” date and time Period. You can also restrict the viewed records to a certain category, activity, or student by using the drop-down boxes. For example, to see the sign-in records for a certain student, first make sure the “Only show this student” box is checked, then select the appropriate student from the drop down:



Click on the “Refresh” button to apply the filter.

Tip: You can click the binocular icons to search for a particular student based on first name, last name, or Sign in (student) ID. You can click in the grid and then begin typing in any of the fields to zoom in on the value you are looking for.

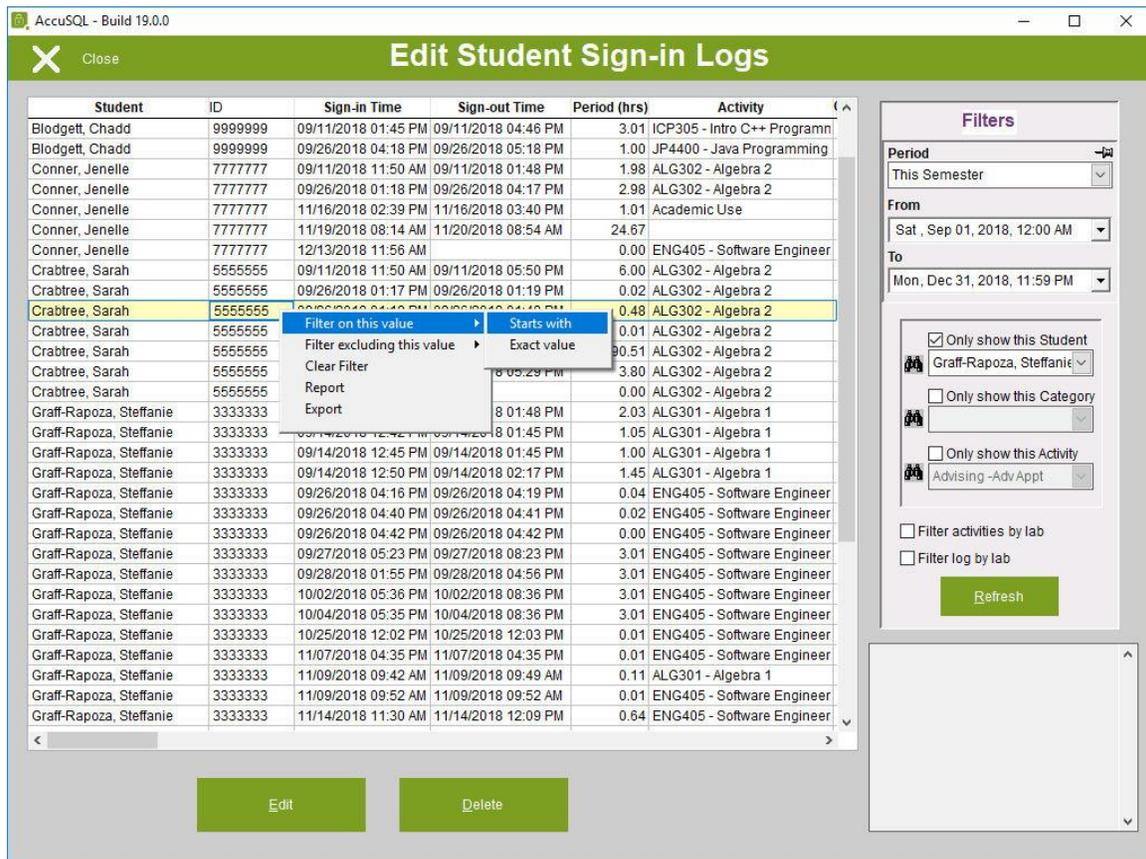


You can also use the binocular icons to search for a specific category, activity ID, or activity.

Note: After you have set the filters the way you want, click the Refresh button to update the results in the main Edit Student Sign-in Logs display grid.

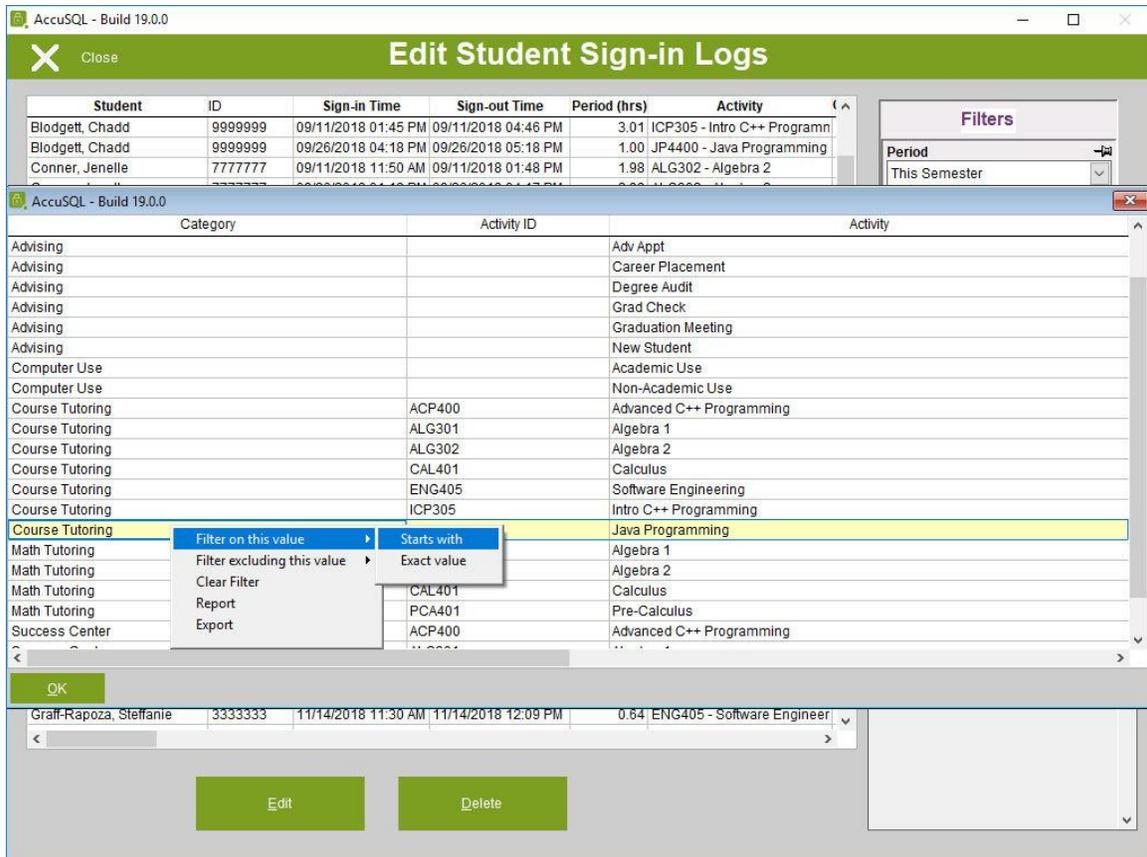
If you are set to a Local Lab, you can also check the boxes to filter the logs to only show the sign-ins for the current lab you are set to. If you are not using Local labs, this filter would not apply. If you set a local lab filter, make sure you click Refresh to display the updated results.

 **Tip:** The display grid that shows the sign-in logs for each student contains several other columns you cannot see unless you use the scroll bar at the bottom of the grid to scroll to the right. If you want to get the information from the grid out quickly to see the whole display, right click in the grid and select Export to open it directly in Excel. This option exists in all *SuperTables* such as this one.



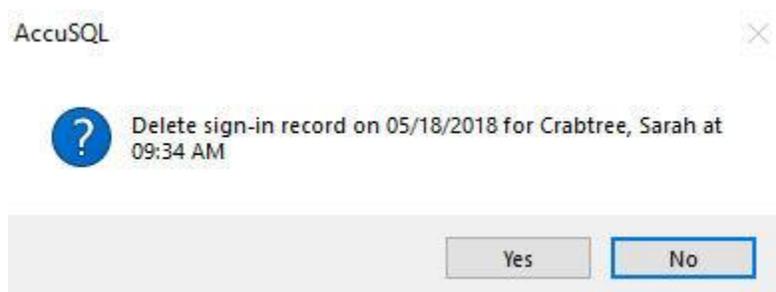
Student	ID	Sign-in Time	Sign-out Time	Period (hrs)	Activity
Blodgett, Chadd	9999999	09/11/2018 01:45 PM	09/11/2018 04:46 PM	3.01	ICP305 - Intro C++ Program
Blodgett, Chadd	9999999	09/26/2018 04:18 PM	09/26/2018 05:18 PM	1.00	JP4400 - Java Programming
Conner, Jenelle	7777777	09/11/2018 11:50 AM	09/11/2018 01:48 PM	1.98	ALG302 - Algebra 2
Conner, Jenelle	7777777	09/26/2018 01:18 PM	09/26/2018 04:17 PM	2.98	ALG302 - Algebra 2
Conner, Jenelle	7777777	11/16/2018 02:39 PM	11/16/2018 03:40 PM	1.01	Academic Use
Conner, Jenelle	7777777	11/19/2018 08:14 AM	11/20/2018 08:54 AM	24.67	
Conner, Jenelle	7777777	12/13/2018 11:56 AM		0.00	ENG405 - Software Engineer
Crabtree, Sarah	5555555	09/11/2018 11:50 AM	09/11/2018 05:50 PM	6.00	ALG302 - Algebra 2
Crabtree, Sarah	5555555	09/26/2018 01:17 PM	09/26/2018 01:19 PM	0.02	ALG302 - Algebra 2
Crabtree, Sarah	5555555			0.48	ALG302 - Algebra 2
Crabtree, Sarah	5555555			0.01	ALG302 - Algebra 2
Crabtree, Sarah	5555555			00.51	ALG302 - Algebra 2
Crabtree, Sarah	5555555			3.80	ALG302 - Algebra 2
Crabtree, Sarah	5555555			0.00	ALG302 - Algebra 2
Graff-Rapoza, Steffanie	3333333			8 01:48 PM	
Graff-Rapoza, Steffanie	3333333	09/14/2018 12:42 PM	09/14/2018 01:45 PM	1.05	ALG301 - Algebra 1
Graff-Rapoza, Steffanie	3333333	09/14/2018 12:45 PM	09/14/2018 01:45 PM	1.00	ALG301 - Algebra 1
Graff-Rapoza, Steffanie	3333333	09/14/2018 12:50 PM	09/14/2018 02:17 PM	1.45	ALG301 - Algebra 1
Graff-Rapoza, Steffanie	3333333	09/26/2018 04:16 PM	09/26/2018 04:19 PM	0.04	ENG405 - Software Engineer
Graff-Rapoza, Steffanie	3333333	09/26/2018 04:40 PM	09/26/2018 04:41 PM	0.02	ENG405 - Software Engineer
Graff-Rapoza, Steffanie	3333333	09/26/2018 04:42 PM	09/26/2018 04:42 PM	0.00	ENG405 - Software Engineer
Graff-Rapoza, Steffanie	3333333	09/27/2018 05:23 PM	09/27/2018 08:23 PM	3.01	ENG405 - Software Engineer
Graff-Rapoza, Steffanie	3333333	09/28/2018 01:55 PM	09/28/2018 04:56 PM	3.01	ENG405 - Software Engineer
Graff-Rapoza, Steffanie	3333333	10/02/2018 05:36 PM	10/02/2018 08:36 PM	3.01	ENG405 - Software Engineer
Graff-Rapoza, Steffanie	3333333	10/04/2018 05:35 PM	10/04/2018 08:36 PM	3.01	ENG405 - Software Engineer
Graff-Rapoza, Steffanie	3333333	10/25/2018 12:02 PM	10/25/2018 12:03 PM	0.01	ENG405 - Software Engineer
Graff-Rapoza, Steffanie	3333333	11/07/2018 04:35 PM	11/07/2018 04:35 PM	0.01	ENG405 - Software Engineer
Graff-Rapoza, Steffanie	3333333	11/09/2018 09:42 AM	11/09/2018 09:49 AM	0.11	ALG301 - Algebra 1
Graff-Rapoza, Steffanie	3333333	11/09/2018 09:52 AM	11/09/2018 09:52 AM	0.01	ENG405 - Software Engineer
Graff-Rapoza, Steffanie	3333333	11/14/2018 11:30 AM	11/14/2018 12:09 PM	0.64	ENG405 - Software Engineer

When editing a student sign in log, you can also filter the activity selection by activities that are currently active or inactive.



DELETING SIGN-IN RECORDS

To delete a sign-in record, first select the record by clicking on it in the *SuperTable*, then click on the "Delete" button. You will see a confirmation message:



Click on "Yes" to delete the record, or "No" to cancel.



Warning: If you delete a sign-in record, it will be gone forever, so be careful using this option.

EDITING STUDENT SIGN-IN RECORDS

To edit a record, select it by clicking on it in the grid, then click on the "Edit" button. This will bring up the Edit Record box.

The screenshot shows the 'Edit Student Sign-in Logs' interface. At the top, there's a table with columns: Student, ID, Sign-in Time, Sign-out Time, Period (hrs), and Activity. Below the table, an 'Edit Sign In Record' dialog box is open, containing the following fields:

- In:** 09/11/2018 11:46 AM
- Out:** 09/11/2018 01:48 PM
- Period:** 2.03
- Category:** Math Tutoring
- Activity:** ALG301 - Algebra 1
- Name:** Graff-Rapoza, Steffanie
- Tutor:** Guzman, Julian
- Service Type:** Required Hours
- Instructor:** Foster, David
- Lab:** Tutoring Center

On the right side, there is a 'Filters' panel with the following options:

- Only show this Student (Graff-Rapoza, Steffanie)
- Only show this Category
- Only show this Activity (Advising - Adv Appt)
- Filter activities by lab
- Filter log by lab

Buttons for 'Save', 'Restore', 'Edit', and 'Delete' are visible at the bottom of the interface.

The box shows the sign-in record. The first box is labeled "In" and shows the sign-in date and time. The second box is labeled "Out" and shows the sign-out date and time. If the out box is empty then the student has not signed out yet. The third box is labeled "Period" and shows the sign-in period in hours and fraction of an hour.

Under these boxes you will see six drop-down boxes. The first drop-down is labeled "Category" and shows the category signed into. The second drop-down is labeled "Activity" and shows the activity signed into. The third drop-down is labeled "Name" and shows the name of the student. The fourth drop-down is labeled "Tutor" and shows the name of the tutor if a tutor was selected at the time of sign-in. The fifth is the Service Type that was selected. The sixth is the Instructor that was selected.

To change the sign-in date or time, simply enter the corrections in the box. The same can be done with the sign-out date and time. As usual, you can right click on the date boxes to use the calendar. Note that

the sign-in period is calculated every time you change the sign-in or sign-out date and leave the time box. If you prefer, you can enter the period directly and it will adjust the Out time accordingly. To change the category, activity, student, instructor, local lab, tutor, etc. simply select the appropriate one from the drop-down window, or use the binocular icons to search for values where available.

To keep your changes, click the "Save" button.

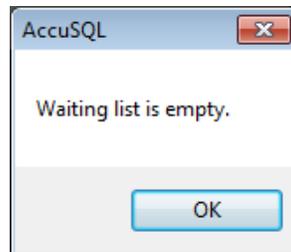
 **Tip:** If you enter a period value, you can quickly add the period of time that the student was in which will automatically update the Out value. So if the student signed in on 4/13/2019 at 10:00 AM for example, and you enter .5 (press Tab on your keyboard after that to update the display) the Out date/time will automatically be set to 4/13/2019 at 10:30 AM.

ACTIVITIES WAITING LIST SCREEN

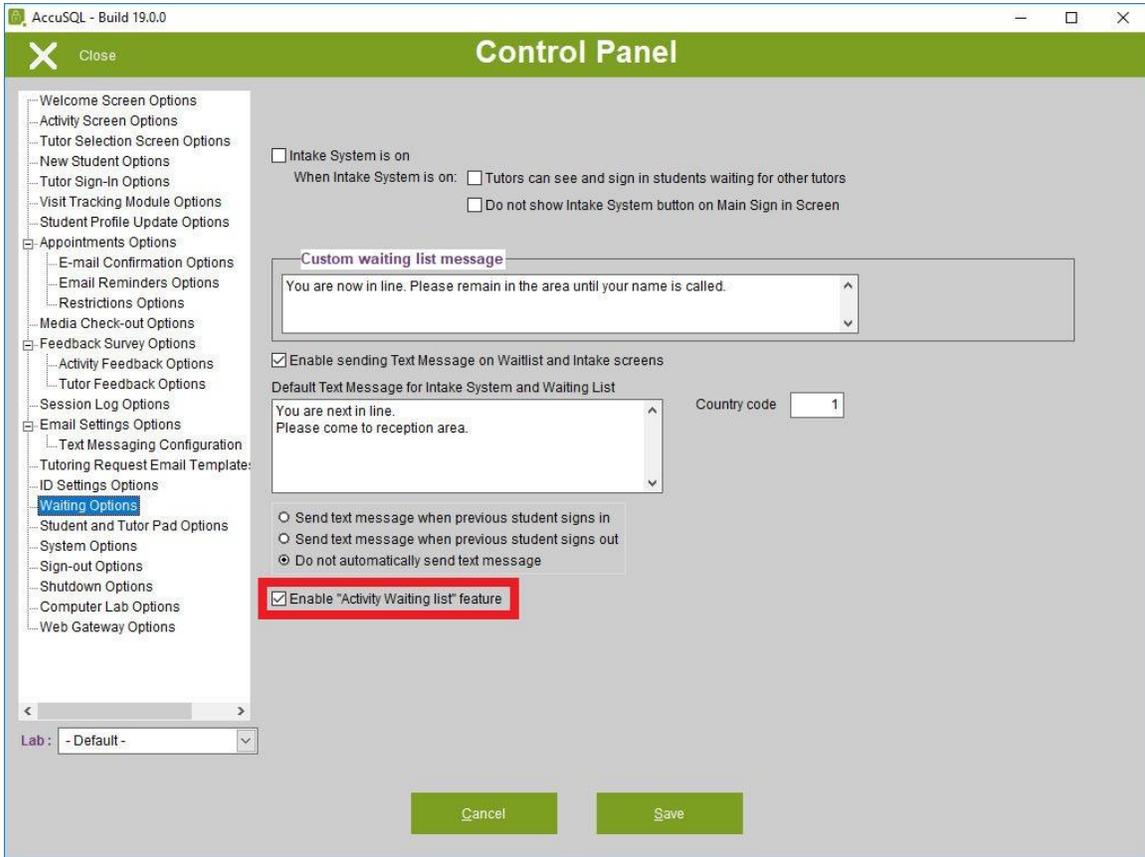
Purpose: To monitor, sign in, or remove students waiting for help with a particular activity.

Access: From System Administration, click on Student Visits Tracking >>Activities Waiting List.

To use the Activities Waiting List, there are a few items that need to be setup. If you have not set those items up and you click this option, you will see the following screen:



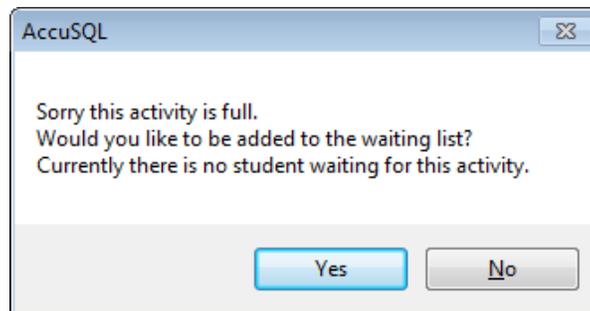
First, you will need to access the Sign-in Setup >> Setup >> Waiting Options screen and check the Enable Activity Waiting list feature checkbox.



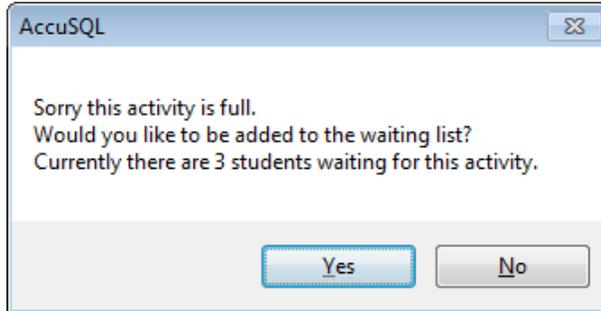
The Activity Waiting List controls the maximum number of students that can be signed into a particular activity at the same time. This can be done on a per activity basis. To enter the maximum number that can be in the activity, go to the Sign-in Setup >> Categories & Activities screen and then select the activity you are configuring and click Edit. In the Max field for the activity record, enter the value for the maximum number of students that can be in the activity at once. In the following example, there is a Guitar class offered in the Music Room that allows for a maximum of 2 students to be in at once.

The screenshot shows the configuration interface for an activity. The 'Max Students' field is highlighted in red and contains the value '2'. Other fields include 'Activity ID', 'Activity' (Adv Appt), 'Activity other', 'Appointment Duration' (Min 0, Max 0), 'Available in these specific labs' (Advising Office [ADV LAB]), 'Instructors' (Select), and 'Default Instructor' (--No Default Instructor--). There are also checkboxes for 'Active', 'Allow unregistered students', 'Open for Appointments', 'Sign In Only', and 'Global Registration'. Buttons for 'Add', 'Delete', and 'Edit' are at the bottom.

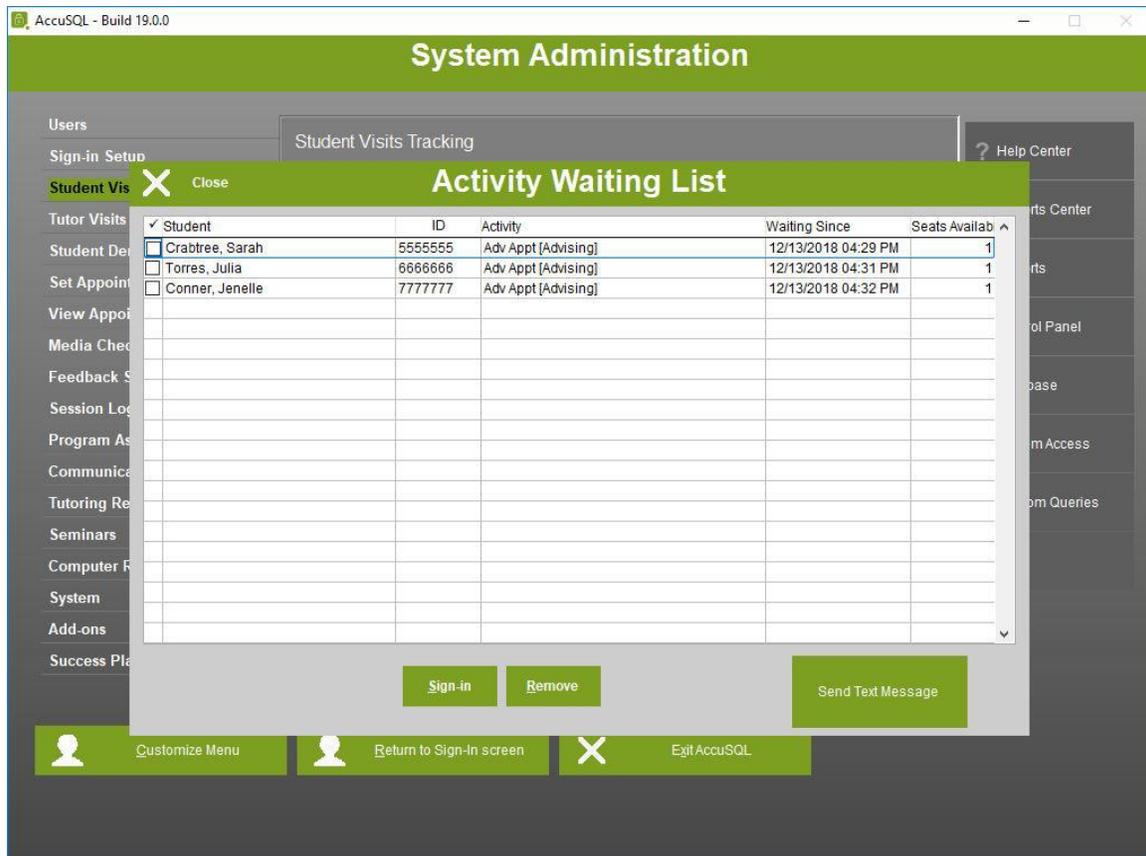
When this maximum is exceeded, AccuSQL/AccuTrack puts the extra students on a waiting list in order of arrival. So using the above example, two students would be able to sign into Guitar, then when the third student signs in (and if the other two had not signed out yet) he/she would see the following message.



As other students sign into that same activity, they will see how many students are waiting in front of them, so they can make the determination if they want to wait (by clicking Yes) or if they want to try again later (by clicking No).



Activity Waiting List admins, can monitor the list either by clicking the Activity Waiting List button on the main sign in screen, or by selecting Activities Waiting List from the System Administration >> Student Visits Tracking module.



This screen shows students currently on the waiting list. The *SuperTable* shows the waiting student’s name, activity, waiting since time, and seats available. Click the checkbox next to the student’s name to sign him/her into the activity indicated. You will only be able to sign them in if there are enough seats available to allow it.

Also, when a student who is signed in to the full activity signs out, the Waiting List will pop up from the main sign in screen and will allow an administrator to sign a student on the waiting list to this activity.

STUDENT VISITS TRACKING SETUP OPTIONS

If you click Student Visit Tracking in Setup from the main System Administration screen, then select Setup, you will be presented with a Control Panel Options view that shows context specific options for your Student Visit Tracking Setup screens.

Here are the Control Panel options for Visit Tracking Module Options in Setup:

- Visit Tracking Module Options – Used to configure specific rules that control how students sign into AccuSQL/AccuTrack.

Ask students how long they intend to stay: If this option is checked, AccuSQL/AccuTrack will ask students how long they intend to stay when they sign in. This is useful if you don't want your students to sign out but would like them to select their sign-in period up front. By default, students will be signed in and signed out with the total period equal to what they select for their intended visit period.

Limit the daily visits of each student to a maximum of: Check this box to set the maximum number of sign-ins any student can make in a day. If checked, then set the maximum number using the spinner box.

Enable Guest Account: Check this box if you want to enable guests (not entered in AccuSQL/AccuTrack as students, tutors, or admins) to sign in. Checking this box will add a Guest Sign in button to the main sign in screen. When guests sign in, they will be available on reports all grouped under the name “AccuSQL/AccuTrack Guest”. Also if you enable guest sign-ins and are using the Intake Systems, guests will be asked to enter their name so you will know who to call when they are ready to be signed in.

Guest Entry is password protected: If you enable guest sign-ins, you can require the guests to enter a password to access the sign in options. That password is entered here and is case sensitive.

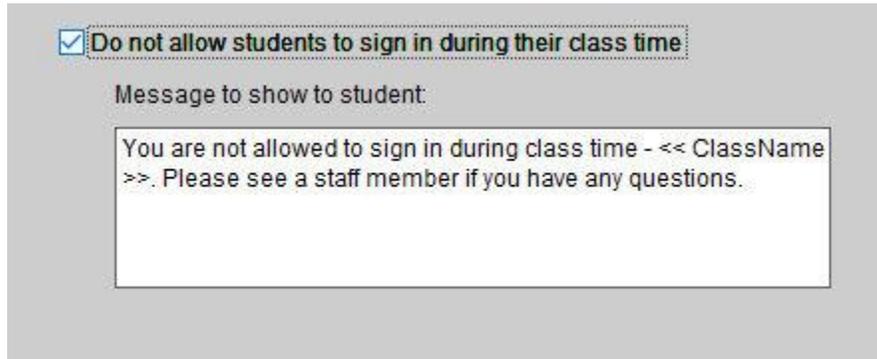
Picture Confirmation Box: Students need picture confirmation to sign in: check this box if you want to display student’s picture at sign in.

Tutors signing in as students need picture confirmation: check this box if you want to show tutor’s pictures too when these tutors sign in as students.

Delete original picture file after acquiring image: Check to delete original file after copying it.

Messages: Inactive student sign-in: type in the message you want to appear when inactive students attempt to sign in.

Class Time Scheduling:



The screenshot shows a configuration interface. At the top, there is a checked checkbox labeled "Do not allow students to sign in during their class time". Below this checkbox is a text input field labeled "Message to show to student:". The text inside the field reads: "You are not allowed to sign in during class time - << ClassName >>. Please see a staff member if you have any questions." The field is surrounded by a dashed border, indicating it is a text input area.

If you have set class schedules for classes using the System Administration >> Sign-in Setup >> Categories & Activities >> Activity Schedules option (or better yet, imported the class schedules), select the Do not allow students to sign in during their activity time checkbox to disable the students’ ability to sign into AccuSQL/AccuTrack during their scheduled class times. If you check the box, then you can enter the custom message that you want to display when students attempt to sign in under these conditions. <<ClassName>> is a merge field and should be kept intact if you want to display the class the student is scheduled for in the pop-up message.

 **Note:** “Do not allow students to sign in during their class time” is used in conjunction with the activity schedules and also with the Sign-in Setup >> Registration options. You must have both of these items setup in AccuSQL/AccuTrack for this option to work properly.

The *SuperTable* in the screen lists signed in users in **alphabetical** order by last name. For each user, you will see the date and time of the sign in and the task, tutor, etc. You can sort the list by clicking on and off the header columns. You can also right click on the grid (as you can with any SuperTable). To filter on certain values, export the data directly to Excel, etc.

Click the Tutors radio button to toggle to sign in tutors.

To see a list of users who are signed out, click on the **“Show Out”** button.

If you have student and tutor photos loaded in, you can click the Show pictures checkbox to see a photo of the student or tutor you currently have selected in the list.

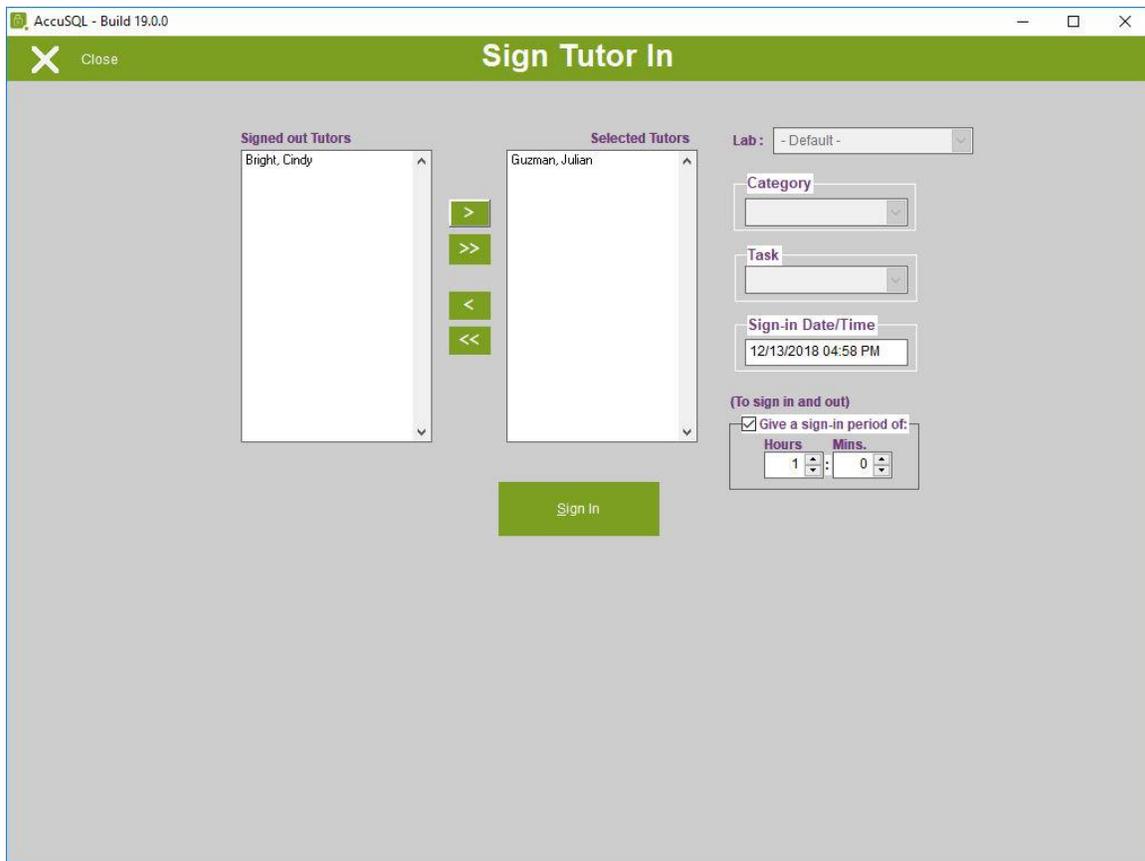
 **Tip:** You can make the “Who’s In” screen accessible to students by selecting the “*Who’s In*” checkbox in the Sign-in Setup >> Setup >> Welcome Screen Options screen. You can also set this up so students can only see the sign-in status of tutors and not of other students.

SIGN IN (TUTORS) SCREEN

Purpose: To manually sign tutors into AccuSQL/AccuTrack.

Access: From System Administration, click Tutor Visits Tracking >> Sign In.

You can use this screen to manually sign tutors in. This could be used if a tutor forgot to sign in or was for some reason unable to sign in. It is also a quick way to sign in multiple tutors at one time.



Here are the steps for manually signing in tutors:

1. Select one or more tutors using the *Selection List Boxes*.
2. Select the Category from the "Category" drop-down box.
3. Select the Task from the "Task" drop-down box.
4. Enter the sign-in date and time.
5. (Optional) If you want to sign the student out too, enter the length of the sign-in session.
6. Click on "Sign In". You will see a confirmation message:



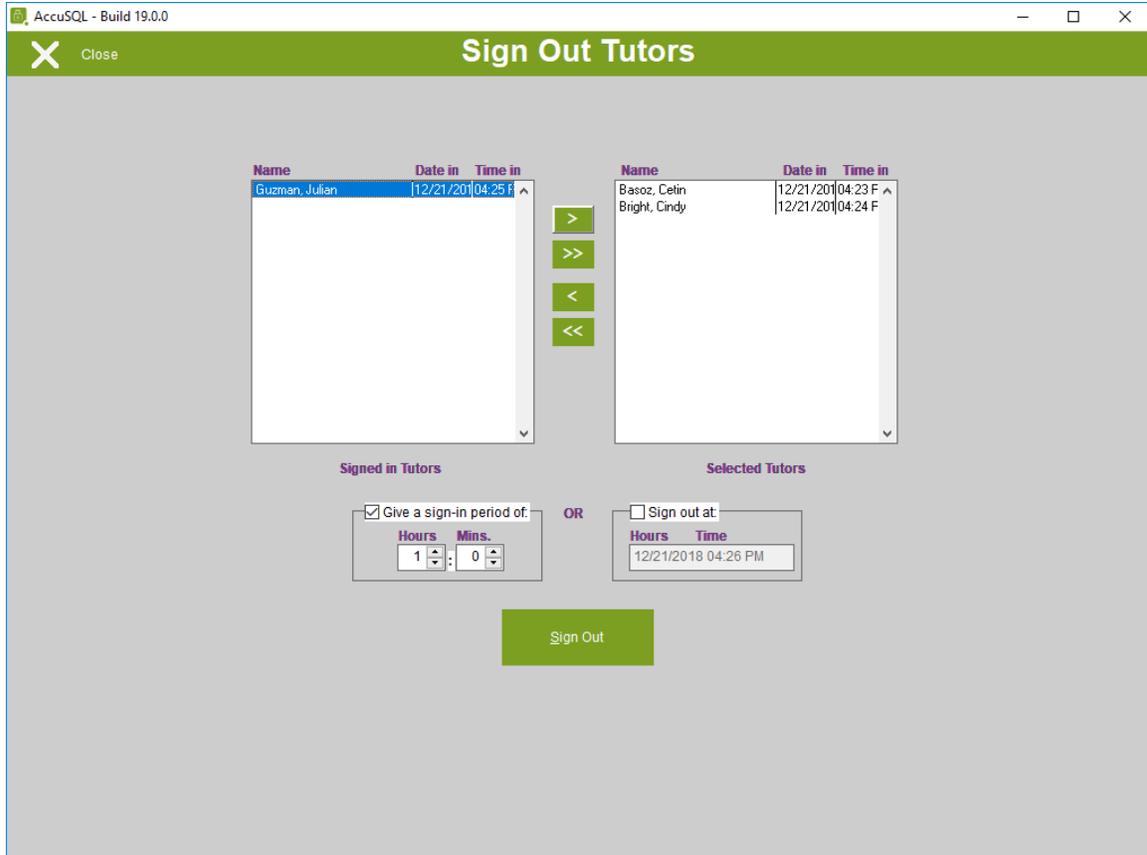
 **Tip:** When you launch this screen, the date and time box will show the current date and time. If you want to sign students in at a different date and/or time, change the values in this text box by typing values in, or you can use the Calendar by clicking on the box with the right mouse button.

 **Tip:** The tutor category and task drop-down boxes will be disabled if you choose not to ask tutors to select a task when they sign in. Otherwise the boxes will be enabled.

SIGN OUT (TUTORS) SCREEN

Purpose: To manually sign tutors out of AccuSQL/AccuTrack.

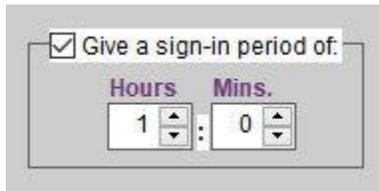
Access: From System Administration, click Tutor Visits Tracking >> Sign Out.



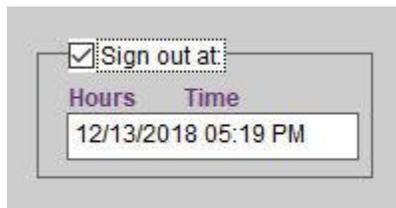
The screen has two list boxes. The list box on the left is labeled "**Signed in Tutors**" and lists the names, sign-in date, and sign-in times of all tutors who are signed in. The list box on the right is labeled "**Selected Tutors,**" and lists the tutors you have selected to sign-out. This list box will be empty when you first access this screen.

Use the *Selection List Boxes* control to select one or more tutors. Before signing the selected tutors out, you need to assign them a sign-in period. AccuSQL/AccuTrack allows you to do this in one of two ways:

- 1) Enter the sign-in period to be given to each person. For example, you can give each person one hour of sign-in time. AccuSQL/AccuTrack will calculate the sign-out time automatically. To do this, first check the "Give a sign-in period of" check box and enter the amount of time you want to give to each person.

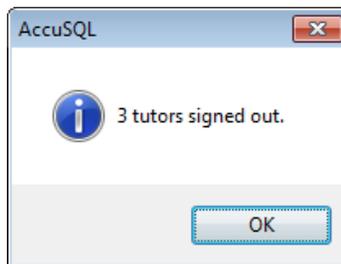


- 2) OR enter the sign-out time for each person. AccuSQL/AccuTrack will calculate the appropriate sign-in period, taking in consideration the maximum sign-in period set in the Options screen. To do this, first check the "Sign out at" check box, and enter the desired sign-out time.



 **Tip:** You can right click on the Sign out at date display to use a calendar picker to change the date and time.

Click on "Sign Out". You will see a confirmation message:



EDIT (TUTOR) SIGN-IN LOGS SCREEN

Purpose: Modify tutor sign-in records.

Access: From System Administration, click on Tutor Visits Tracking >> Edit Sign-in Logs.

Tutor	ID	Category	Task	Sign-in Time	Sign-out Time
Guzman, Julian	1234567	Tutoring	Regular Hours -	09/11/2018 11:48 AM	09/11/2018 09:48 P
Basoz, Cetin	ABC0555	Tutoring	Regular Hours -	09/11/2018 01:47 PM	09/11/2018 11:47 P
Basoz, Cetin	ABC0555			10/15/2018 08:47 AM	10/15/2018 10:31 A
Basoz, Cetin	ABC0555	Tutoring	Regular Hours -	10/24/2018 03:48 PM	10/31/2018 05:44 P
Basoz, Cetin	ABC0555			10/31/2018 01:18 PM	10/31/2018 01:18 P
Basoz, Cetin	ABC0555			10/31/2018 01:19 PM	10/31/2018 01:20 P
Basoz, Cetin	ABC0555			10/31/2018 01:20 PM	10/31/2018 05:44 P
Basoz, Cetin	ABC0555	Tutoring	Regular Hours -	11/14/2018 12:12 PM	11/20/2018 08:54 A
Guzman, Julian	1234567			11/16/2018 08:39 AM	11/20/2018 08:54 A
Basoz, Cetin	ABC0555			11/16/2018 08:42 AM	11/16/2018 08:42 A
Basoz, Cetin	ABC0555			11/16/2018 02:19 PM	11/20/2018 08:54 A
Bright, Cindy	5550444			11/20/2018 11:08 AM	11/26/2018 11:24 A
Basoz, Cetin	ABC0555			11/26/2018 08:16 AM	11/26/2018 11:24 A
Basoz, Cetin	ABC0555			11/27/2018 08:23 AM	11/27/2018 05:20 P
Basoz, Cetin	ABC0555			11/30/2018 02:30 PM	12/03/2018 06:05 P
Basoz, Cetin	ABC0555			12/10/2018 05:08 PM	12/10/2018 06:08 P
Basoz, Cetin	ABC0555			12/13/2018 10:43 AM	

The procedure to edit tutor sign-in records is very similar to the one used when editing the Student's sign-in records.

The table in this screen displays the tutor, category, task, sign-in time, sign-out time, and sign-in period for each sign-in record.

FINDING A RECORD

You can use the filters on the right side of the screen to zoom to the record you want to change. Start by restricting the viewed records to a certain time period by entering the "From" and "To" date and time. You can also restrict the viewed records to a certain category, task, or tutor by using the drop-down boxes. Click on the "Refresh" button to apply the filter.

Use the binocular icons to search for a specific tutor, name or ID, and/or a specific category or task. After selecting the values you want, click the refresh button to update the values in the Edit Tutor Sign-in Logs display grid.

DELETING SIGN-IN RECORDS:

To delete a sign-in record, first select the record by clicking on it in the grid, then click on the "Delete" button. You will see a confirmation message. Click on "Yes" to delete the record, or "No" to cancel.



Warning: When you delete a record, it will be gone forever, so be careful using this option.

EDITING SIGN-IN RECORDS

To edit a record, select it by clicking on it in the grid, then click on the "Edit" button. This will bring up the Edit Record box.

The screenshot shows the 'Edit Tutor Sign-in Logs' window in AccuSQL. The main window has a table with columns: Tutor, ID, Category, Task, Sign-in Time, and Sign-out Time. A modal dialog titled 'Edit Tutor Sign In Record' is open, containing fields for In (10/24/2018 03:48 PM), Out (10/31/2018 05:44 PM), and Period (169.94). Below these are drop-down menus for Category (Tutoring), Task (Regular Hours -), and Tutor (Basoz, Cetin). The dialog has 'Save' and 'Restore' buttons. To the right is a 'Filters' sidebar with options for Period (This Semester), From (Sat, Sep 01, 2018, 12:00 AM), To (Mon, Dec 31, 2018, 11:59 PM), and checkboxes for 'Only show this Tutor', 'Only show this Category', and 'Only show this Task'. At the bottom of the window are 'Edit' and 'Delete' buttons.

The first box is labeled "In" and shows the sign-in date and time. The second box is labeled "Out" and shows the sign-out date and time. If the out box is empty then the tutor has not signed out yet. The third box is labeled "Period" and shows the sign-in period in hours and fraction of an hour.

Under these boxes you will see three drop-down boxes. The first drop-down is labeled "Category" and shows the category signed into. The second drop-down is labeled "Task" and shows the task tutor signed into. The third drop-down is labeled "Tutor" and shows the name of the tutor.

To change the sign-in date or time, simply enter the corrections in the box. The same can be done with the sign-out date and time. As usual, you can right click on the date boxes to use the calendar. Note that the sign-in period is calculated every time you change the sign-in or sign-out date and leave the time box. You can also enter the period directly and it will adjust the Out time accordingly. To change the category, activity, student, or tutor, simply select the appropriate one from the drop-down window, or use the binoculars icon to search for a record.

If you want to revert to the saved record without making changes, click on the "Restore" button. If you want to save your changes, click on the "Save" button. To close the Edit Record box, click on "Close".

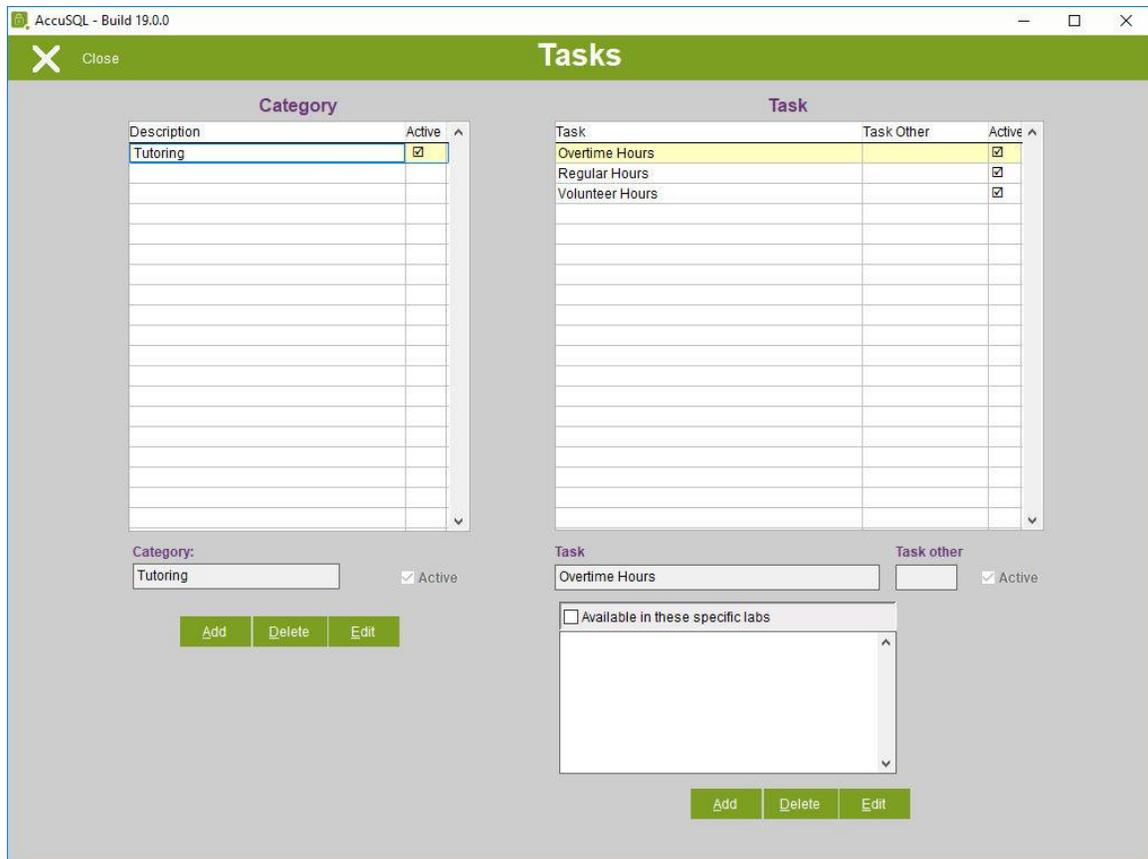
TUTOR TASKS SCREEN

Purpose: Enter and modify tutor’s tasks.

Access: From System Administration, click on Tutor Visits Tracking>> Tasks.

If you plan on tracking tutors’ work hours, you might also be interested in tracking what they do with their time by setting up a list of tasks for them to sign in to.

You will see two list boxes displaying the tutor’s current categories and tasks. The list box on the left shows the categories. The list box on the right shows the activities for the selected category. For new installations, both boxes will be empty.



If the sign in station is set to either the Tutoring Center or the Mathematics Center and tutor task selection is enabled for that lab, then that selection, and any others that are assigned to those labs, will appear in the tutor sign in task selection pick list:

AccuSQL

Tutoring Center Services

Cetin Basoz

Please select the service you are going to use today.

Category Tutoring

Service Overtime Hours -
Regular Hours -
Volunteer Hours -

Sign In
Cancel

Note: Students' activities are for tracking what students do during their visits and they get displayed when students sign in. Tutor's tasks are for tracking what tutor does when working and they get displayed when tutors sign in. The two are separate from each other.

Adding a Category

To **add** a new category, click "**Add**" on the left and then type its name in the category entry box and then click on the "**Save**" button under it. The category's name will move from the text box to the **Category** list box

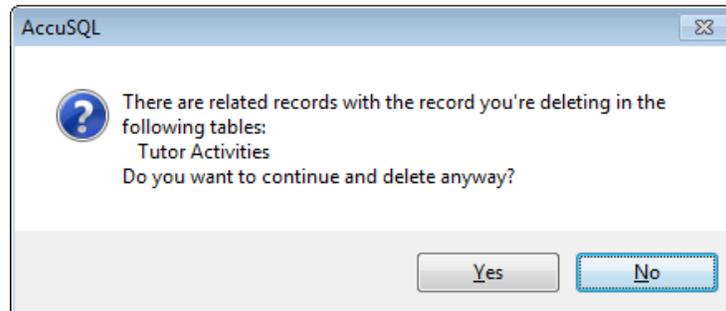
Editing a Category

To **edit** a category, highlight it in the **Category** list box by clicking on it, then click on the "**Edit**" button under the Category text box. You can also double click on the category name to edit it. The category will be copied to the entry box where you can make the changes. When you click the "**Edit**" button, the

"Save" and "Cancel" buttons appear. If you want to keep your changes, click the "Save" button. If you want to keep the category as it appears in the **Category** list box, click on the "Cancel" button.

Deleting a Category

If you enter a category by mistake, and wish to remove it from the list, highlight it by clicking on it and click on the "Delete" button. AccuSQL/AccuTrack will check to make sure that the category was not used in sign-ins, and if so, it will display a message as follows:



If you answer "Yes", the category will be deleted.

Important: If the category was used in the sign-ins, you should make the category inactive and not delete it if you still want to run reports on it.

Making a Category Inactive

If you need to remove a category from the sign-in screens because it is no longer needed, and you are not able to delete it because it is needed for the reports, you can make the category inactive. Inactive categories do not appear in the sign-in screens, but are still available for reports.

To make a category inactive, first highlight it and click on "Edit", then uncheck the active check box by clicking on it, and then click on "Save".

Adding a Task

To **add** a task, follow these steps:

1. Select the Category under which the task will be added by clicking on the category.
2. Click Add (right side)
3. Enter the activity's name in the Task entry box, located under the Task list box on the right.
4. Click on the "Save" button under the Task text box. The activity's name will move from the text box to the Task list box.

Editing a Task

To **edit** a task, highlight it in the **Task** list box by clicking on it, and then click on the "Edit" button under the Task List box. You can also double click on the activity's name to edit it. The activity will be copied to the Activity entry box where you can make the changes. If you want to keep your changes, click the "Save" button. If you want to keep the activity as it appears in the list box, click on the "Cancel" button.

Deleting a Task

If you enter a task by mistake, and wish to remove it from the list, highlight it by clicking on it and click on the "**Delete**" button under the activity list box. AccuSQL/AccuTrack will check to make sure that no one has signed in to this task before, and if so, you will see a confirmation message. Answer "**Yes**" to delete the activity.

If the task was signed in to, it will be needed for the reports, and you will not be allowed to delete it. In this case you can make the task inactive. This means it will not appear in the sign-in screens anymore, but it will still exist in the database for use in reports.

Making an Task Inactive

To make an activity **inactive**, first highlight it and click on "**Edit**", then uncheck the active check box by clicking on it, and then click on "**Save**".

 **Tip:** Displaying the Tutor Tasks screen is optional. If you want to display it, make sure that the option "Display the Task screen when tutor sign in" is checked in the Tutor Visits Tracking >> Setup >> Tutor Sign in Options screen. If this box is not checked, AccuSQL/AccuTrack will not display the Tasks screen to tutors and will record their sign-in time without recording any task selection.

PAY RATES SCREEN

Purpose: Enter tutor pay rates for calculating pay.

Access: From System Administration, click on Tutor Visits Tracking>> Pay Rates.

Use this screen to define your center's pay grades. For each pay grade, you can define the minimum and maximum pay. You can also define bonus pay including preparation time, no-show pay, and groups of 2, groups of 3, and groups larger than 3 pay.

Note: The above items are optional, so if you do not pay for preparation time, for example, enter 0 in that field.

Adding a Pay Rate

To add a new pay rate, click on the "Add" button, next, enter the pay type, the no-show rate, and preparation rates (both percentages). You can also enter the pay increment for groups of 2 students, group of 3 students, and group of more than 3 students (in dollars and cents). These values are calculated

based on tutor group appointments and will be added to the basic pay rate of the tutors. Next, enter the minimum and maximum pay rates for this group. Click on Save to add the new pay rate.

Editing a Pay Rate

The list box at the left side of the screen shows the current pay rates. To edit the information for one of these pay rates, click it and then click Edit. AccuSQL/AccuTrack will enable the data fields and copy the data to them. You can then make your changes. When you are done editing click on **"Save"** to keep the changes.

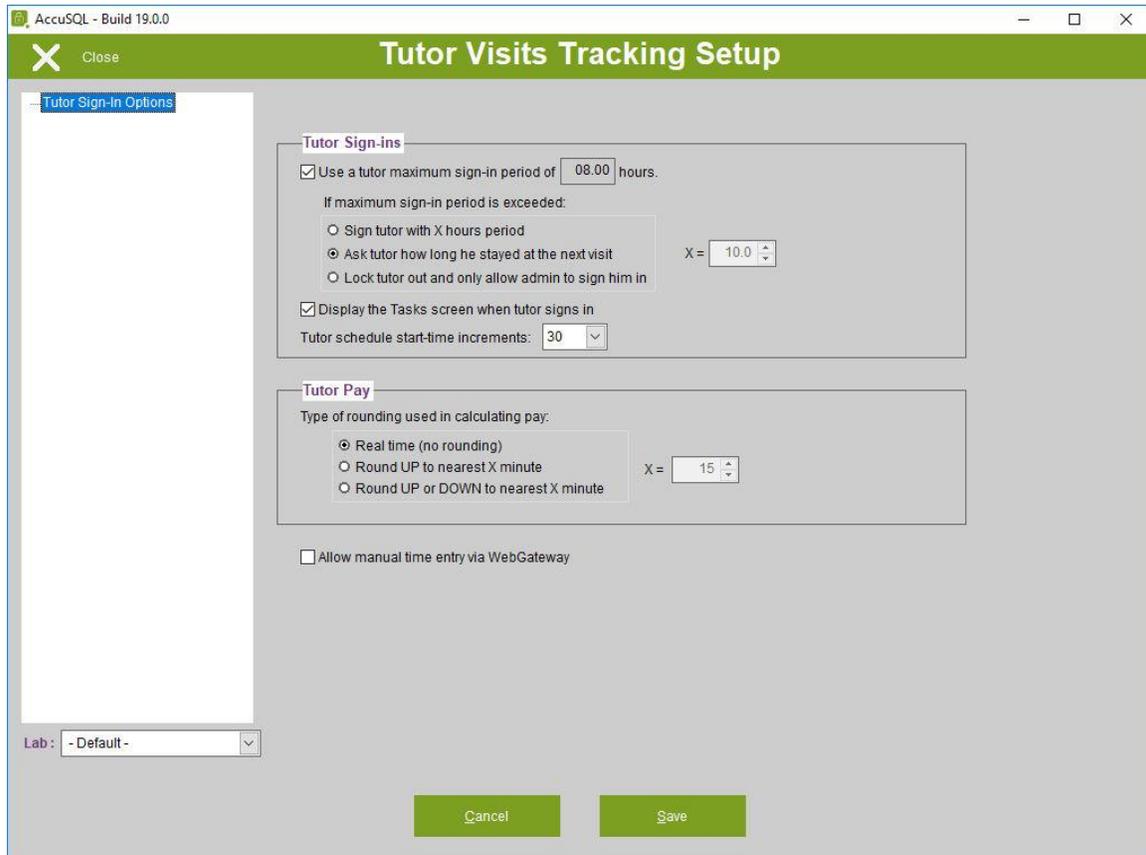
 **Note:** After you have the pay rates created, they are then added to the tutor records in the Users >> Tutors screen in the Pay Type and Pay Rate field. The pay rate will populate with the minimum basic rate but can be adjust up to the maximum basic rate you have entered for that pay type.

TUTOR VISITS TRACKING SETUP OPTIONS

If you click Tutors Visit Tracking in from the main System Administration screen, then select Setup, you will be presented with a Control Panel Options view that shows context specific options for your Tutor Visits Tracking Setup screens.

Here are the Control Panel options for Tutor Visit Tracking Setup Options in Setup:

- Tutor Sign-in Options – Used to configure specific rules that control how tutors sign into AccuSQL/AccuTrack.



Use a tutor maximum sign-in period of X hours: Use this option to enter the maximum sign-in period for tutors. Next use the radio buttons to determine what happens when this maximum sign-in period is exceeded:

- Sign tutor with X hour period: Choose this option if you want tutors who exceed the maximum sign-in period to get signed out with X sign-in period. Set X to whatever you like using the X= spinner box.
- Ask tutor how long he stayed at the next visit: Choose this option to have AccuSQL/AccuTrack ask the tutor at the next visit to enter the sign-in period for the previous visit in which the maximum sign-in period was exceeded.
- Lock tutor out and only allow admin to sign him in: Choose this option for maximum control over the accuracy of the sign-in records. With this option selected, when a tutor exceeds the maximum sign-in period AccuSQL/AccuTrack will lock the tutor out. To unlock the tutor’s record, the tutor must be signed out via the System Administration – Edit Sign-in Logs – Tutors – Sign out screen.

Display the Tasks screen when tutor sign in: Check this box if you want to track what tutors do with their work time. If you only want to track the sign-in and sign-out times, uncheck this box.

 **Note:** If you use this option, make sure to enter the staff Tasks via the Tutor Visits Tracking >> Tasks screen.

Tutor schedule start increment: Use the drop-down box to select the increment of the list box used to enter the tutor's schedule. For example, if you use "30", then the tutor's schedule can start and end at 8:00, 8:30, 9:00, and so on.

Tutor Pay rounding: Use this box to determine the rounding rules when calculating the tutor's pay. Rounding is applied to each session and not to the accumulated time. Select the first option if you do not want to do any rounding. Select the second option if you want to round the time up (e.g. if X=15, 47 minutes are counted as one hour for pay purposes). Select the third option if you want to round up or down to the nearest X minutes (e.g. if X=15, 47 minutes are counted as 45 minutes, while 53 minutes are counted as 60 minutes).

STUDENT DEMOGRAPHICS

When you click on Student Demographics from the Main Menu, you will see the following options:

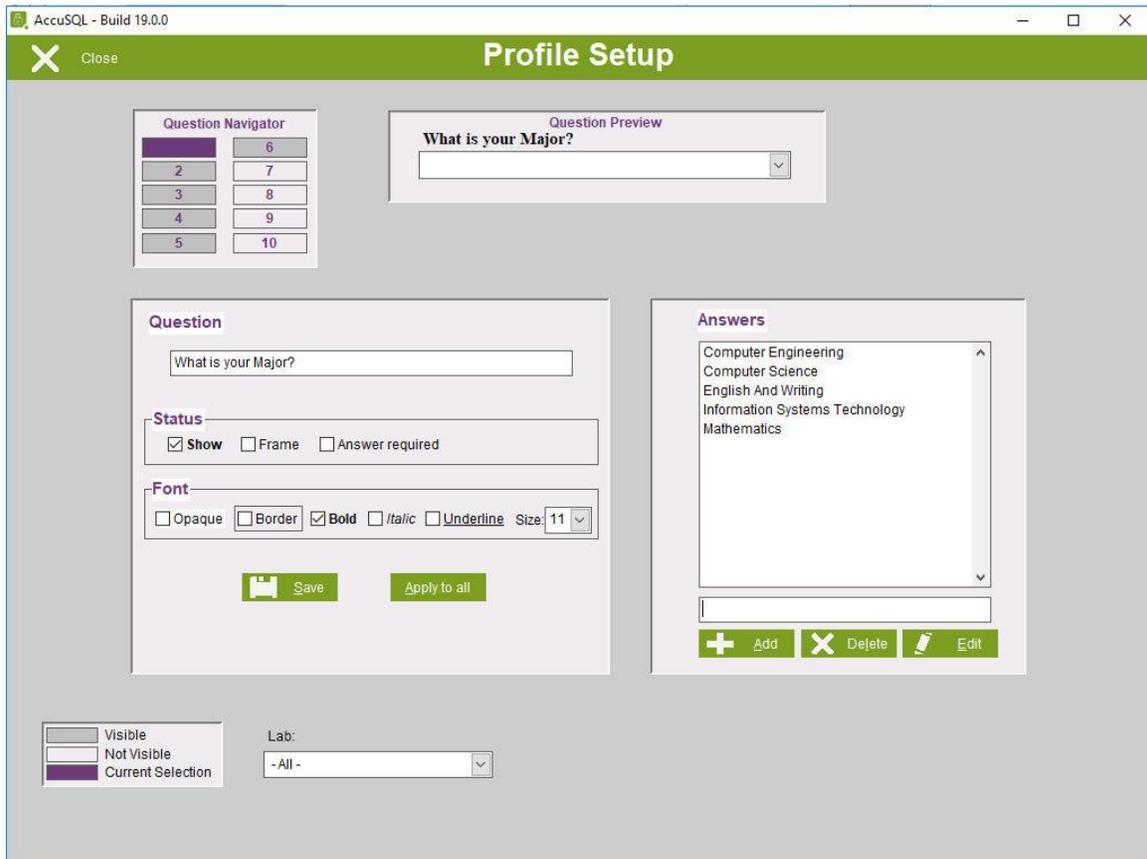
1. Profile Setup: Used to setup the profile questions and their values to assign to your student records.
2. Student Profile: Used to view and assign profile values to your students.
3. Profile Query: Used to run searches based on your various profiles and then report on, or create student groups with those searches.

PROFILE SETUP

Purpose: Setup profile questions and answers to collect additional information for students.

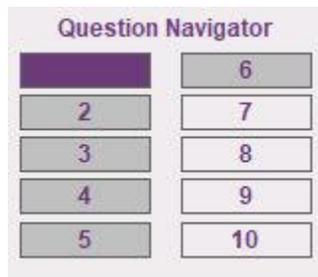
Access: From System Administration >> Student Demographics, click on Profile Setup.

When a new student signs-in, AccuSQL/AccuTrack will display the "New Student" screen used to collect contact information and demographics data. AccuSQL/AccuTrack gives you the flexibility to define up to 10 demographics questions in this screen. You can have students update their own profile values, you can assign them manually, and you can also import them.



Following is an explanation of the elements that comprise this screen:

QUESTION NAVIGATOR



The Question Navigator box allows you to select the question you want to set up. The Student screen has the capacity to show up to 10 profile questions. These questions are arranged in two columns, and each column has five questions. To select one of the questions, simply click on its position in the “Question Navigator” box. For example, to select the seventh question in the second column, simply click on it. The selected question will appear highlighted in a solid color.

QUESTION PREVIEW BOX

The “Question Preview” box shows how the selected question will appear in the Student screen. Use this box to preview the looks and format of the selected question.

QUESTION BOX

This box allows you to edit the text of the selected question.

STATUS BOX

The Status Box allows you to define the status of the selected question. There are three options in this box:

- **Show:** Check this box if you want the question to be visible in the *New Student* screen. If you do not need this question, uncheck the *Show* box.

- **Frame:** Check this box if you want a frame or a border to appear around the question and the answer box.
- **Answer Required:** Check this box if you want force students to answer this question. When this box is checked, AccuSQL/AccuTrack will not allow the student to proceed with a sign in until an answer is selected from the drop-down box.

FONT BOX

The font box allows you to define the appearance of the question:

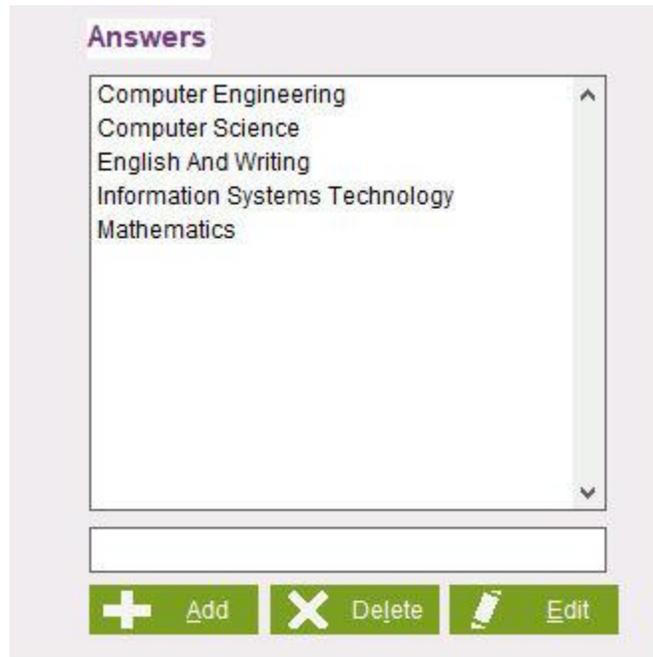
- **Opaque:** Check this box if you want the question to have a colored background. Uncheck the box to use a transparent background.
- **Border:** Check this question if you want to have a border around the question
- **Bold:** Check this box to show the question in **bold** font.
- **Italic:** Check this box to show the question in *italic* font.
- **Underline:** Check this box to underline the question.
- **Size:** Use the drop-down box to select the size of the font.

 **Tip:** Use the Question Preview box to see how the question will appear when you make changes in the Font box.

 **Tip:** If you want all questions in the New Student screen to have the same font and status as the current question, click on “**Apply to all**” button.

 **Tip:** Questions that will not appear in the New Student screen because they are set to be invisible will have a transparent box.

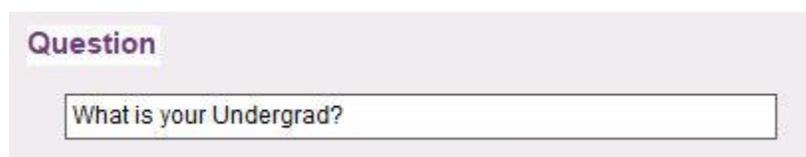
ANSWERS BOX



The answers box shows the available answers for the selected question. You can use this box to add new answers or to edit or delete existing answers.

MODIFYING A QUESTION

To change a question, simply select it in the *Question Navigator* then change the text in the “Question” box.



You can also change the status and appearance of the question.

Click on “**Save**” to keep your changes.

Tip: You should only change the questions before students use the system. Changing the questions after students use the system will lead to inaccurate data. For example, let’s say the first question is “College: Business, Engineering, Art and Science” and a student selected “Business” as the answer. You change the question to read “Standing: Freshman, Sophomore, Other”. Now the answer to this question for the student that selected “Business” has changed to refer to “Freshman” (first answer of the question). This may or may not be the correct answer for this

student.

ENTERING THE ANSWERS TO A QUESTION

For each question you enter, you will need to define the answers that appear in the question's drop-down list box. First select the question using the *Question Navigator* box, and then use the *Answers* box on the right side of the screen.

The image shows a screenshot of a software interface. At the top is a text entry box containing the text "English And Writing". Below this box are two buttons: a green button with a white 'X' icon and the text "Cancel", and a green button with a white floppy disk icon and the text "Save".

To add an answer, simply type it in the entry box and click on **"Add"**. To edit an answer, highlight the answer and click on **"Edit"**. The answer will be copied to the entry box. Make your changes and click on **"Save"** or **"Cancel"**. To delete an answer, highlight the answer then click on **"Delete"**.

 **Note:** You should only change the answers to questions before students use the system. Changing the answers afterwards can lead to inaccurate data.

 **Tip:** The answers to the profile questions may change from semester to semester. For example, the student's standing might change from "Freshman" to "Sophomore". To have students review and update their profile answers, click on the "Update Profile" button in the Options screen.

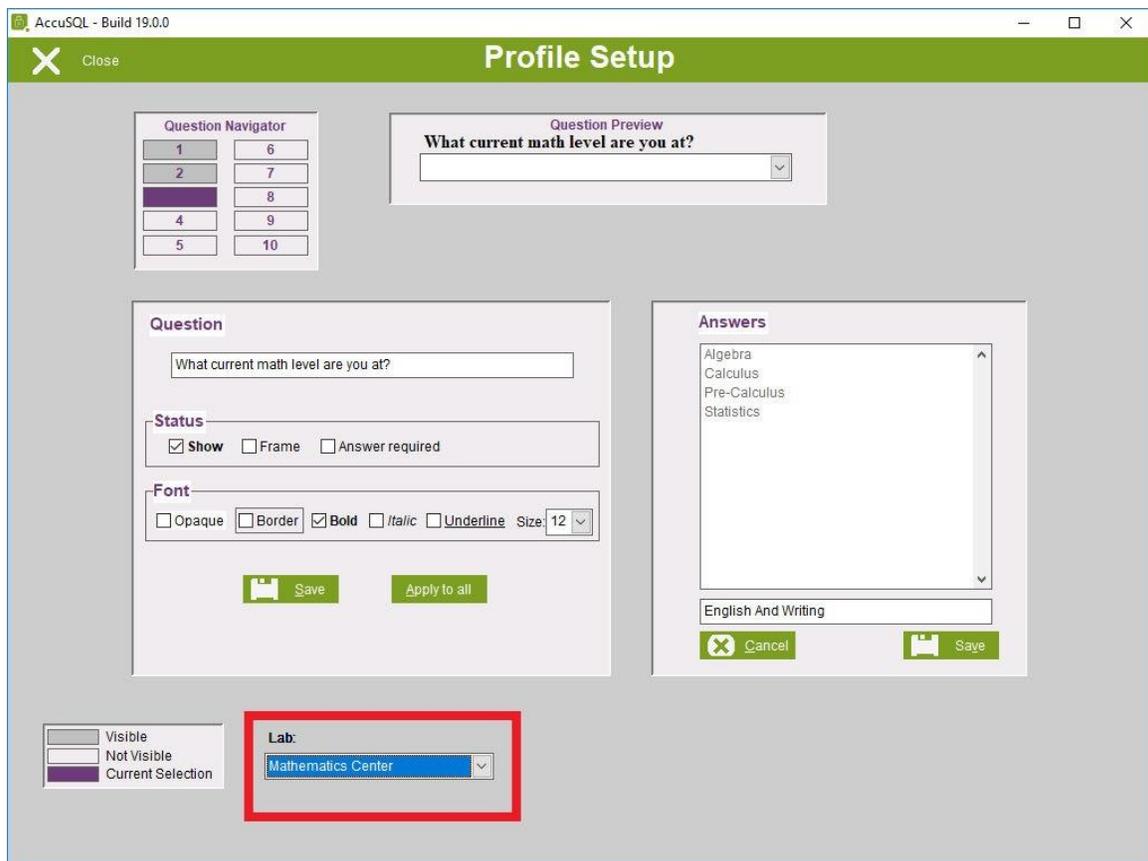
 **Tip:** If needed, you can correct the student's answer to a profile question by editing the record in the Modify Students screen.

 **Tip:** You can import the answers to the profile questions along with other students' info by using the Student Information Import Wizard.

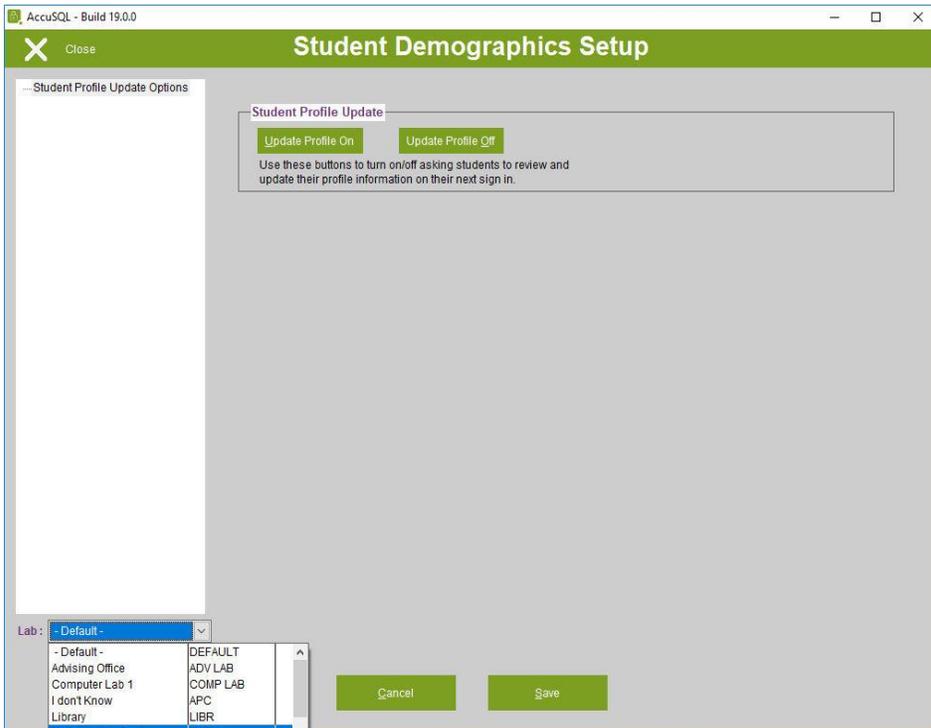
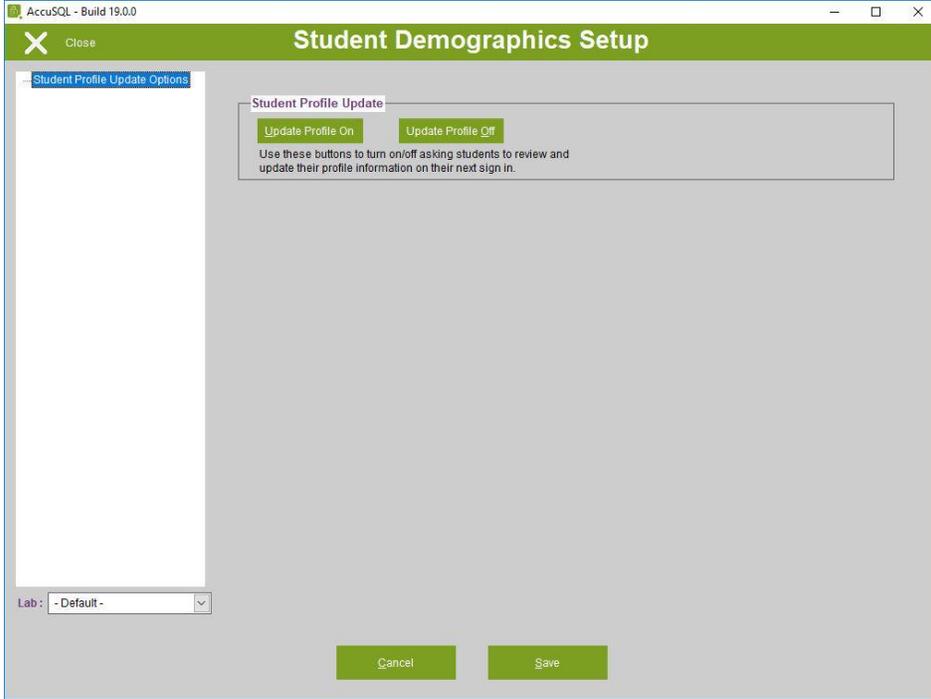
USING PROFILE FIELDS FOR LOCAL LABS

New for version 2015 and beyond of AccuSQL and AccuTrack, you can now create profile fields specifically for Local Labs. The sign in stations that have the local lab assignment you are creating the profile questions for will display the lab specific profile questions after the default questions are displayed. This section will show you an example of that functionality.

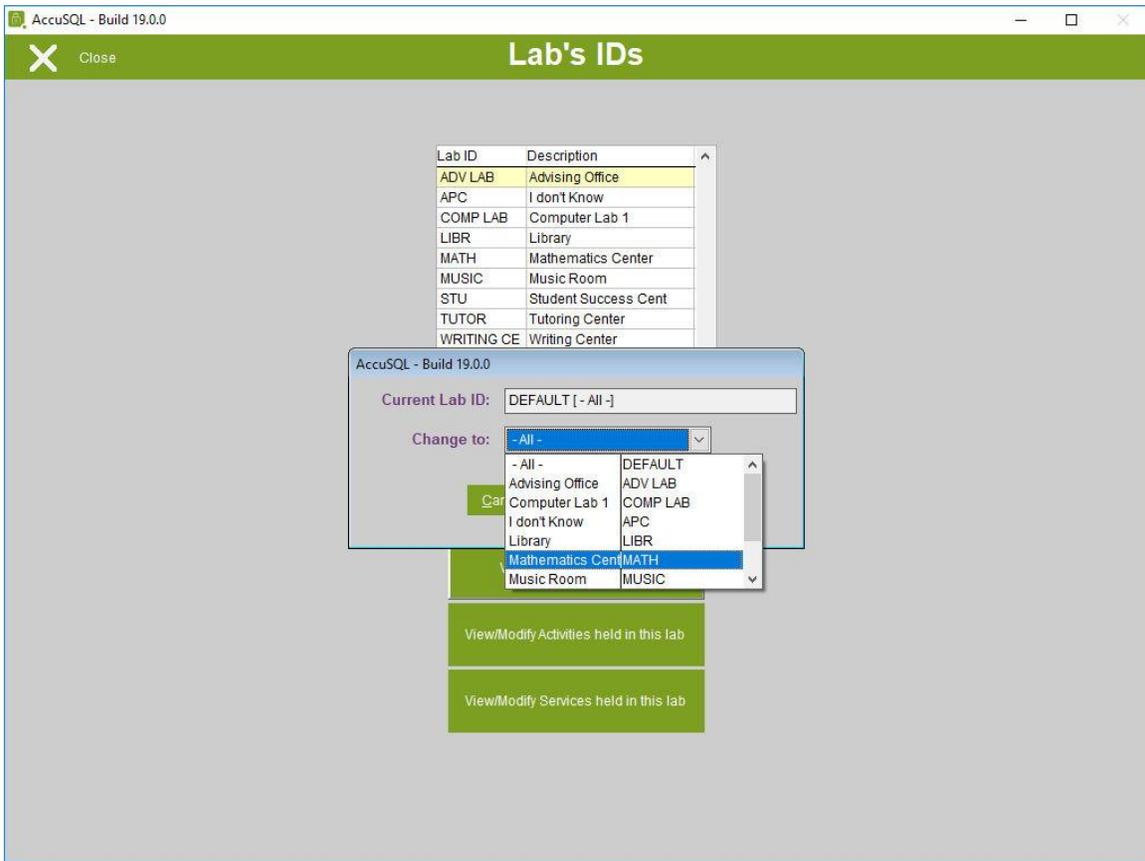
First, you need to click the Lab drop-down box and select the lab you are creating the profile for. In this case, I have a MATH lab. Once you change the lab, you will be able to create 10 more profile questions specific to the lab. In the following screen, 3 profile questions (and answers) have been setup specifically for the Math Lab:



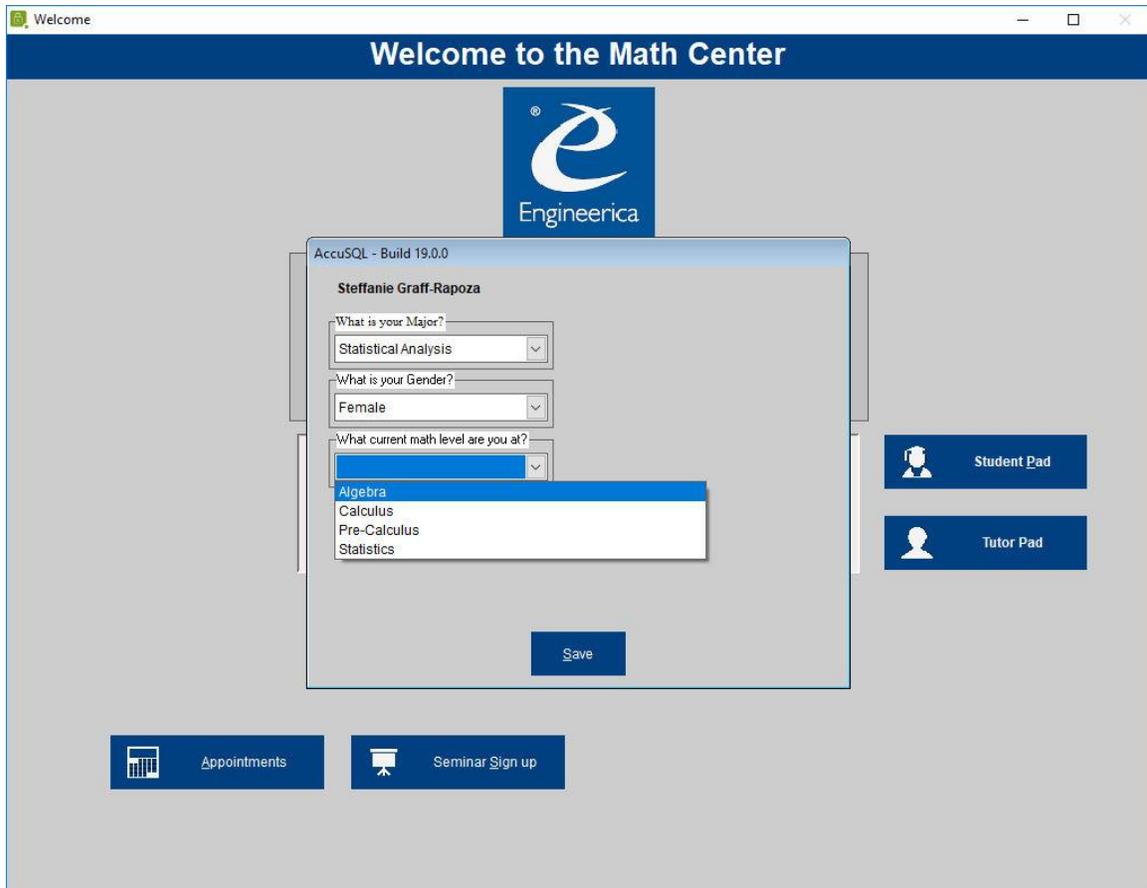
Now in Student Demographics >> Setup, the Lab would be selected and then to enable the profile update, the user would need to click the Update Profile On button. Make sure you have the lab selected you want to update the profiles for in the bottom-left Lab: drop-down box!



And then the System >> Lab ID should be set to the Math Lab.



Now when then student signs in, they will get the 10 Default profile questions (if there are any) and then will be presented with the 3 profile questions specific to the Math Lab:

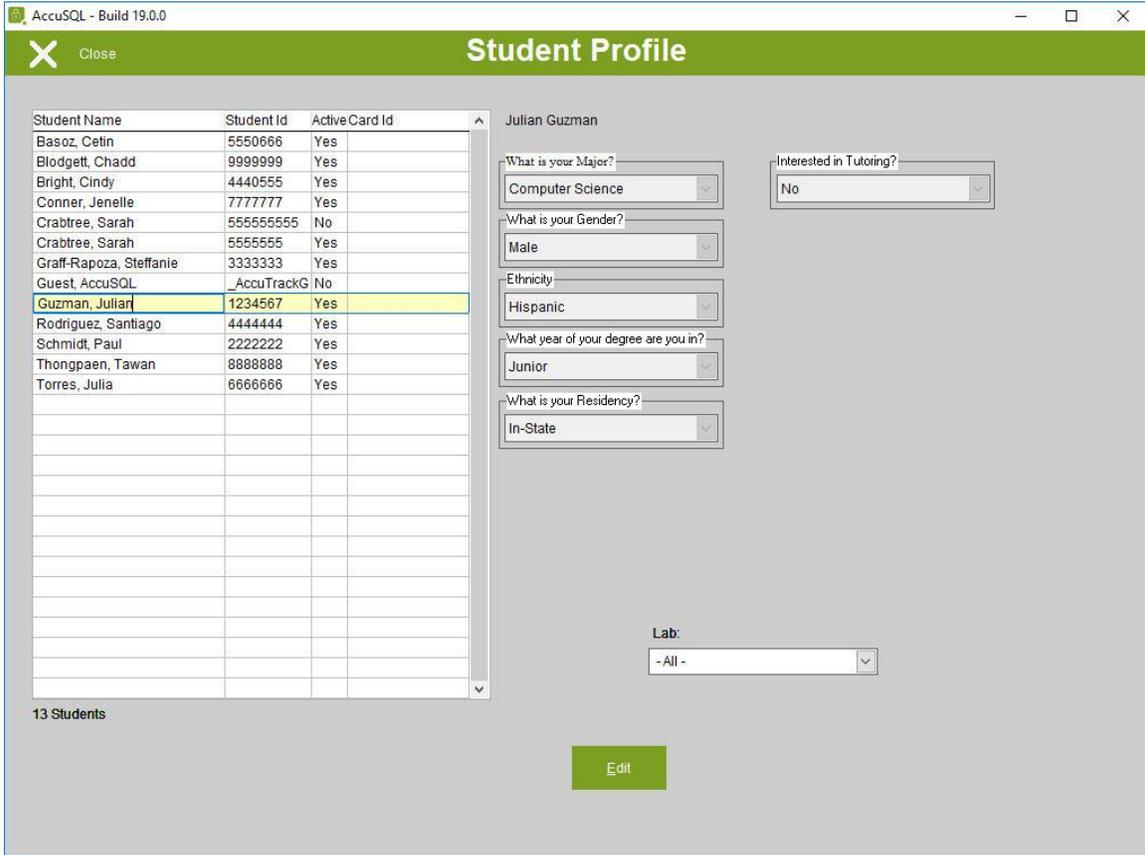


After the questions are answered and the student clicks Save, then he/she would go about the normal sign-in process.

STUDENT PROFILE

Purpose: View and/or add profile values for students.

Access: From System Administration >> Student Demographics, click on Student Profile.



Click on a Student Name to select the record, and then click Edit if you want to change any of the profile values for the student. Save when you are done. If you want to find a particular student in the list, you can click in the grid on either Student Name, or student ID and then begin typing either the last name, or the student ID, depending in the column where you are typing.

If you would like to view or edit profile information for a specific lab, select the Lab from the drop-down box and the screen will show the profile fields specific to the selected lab. By default, the profile questions being displayed will be the ones for the current lab you are set to in System >> Lab IDs >> View/Modify Local Lab ID.

Student Name	Student Id	Active Card Id
Basoz, Cetin	5550666	Yes
Blodgett, Chadd	9999999	Yes
Bright, Cindy	4440555	Yes
Conner, Jenelle	7777777	Yes
Crabtree, Sarah	555555555	No
Crabtree, Sarah	55555555	Yes
Graff-Rapoza, Steffanie	3333333	Yes
Guest, AccuSQL	_AccuTrackG	No
Guzman, Julian	1234567	Yes
Rodriguez, Santiago	4444444	Yes
Schmidt, Paul	2222222	Yes
Thongpaen, Tawan	8888888	Yes
Torres, Julia	6666666	Yes

Steffanie Graff-Rapoza

What is your Major?
Statistical Analysis

What is your Gender?
Female

What current math level are you at?

Lab:
Mathematics Center

13 Students

Edit

 **Note:** If you have lots of students you want to assign profile values for, you would be much better served importing that data into AccuSQL/AccuTrack. Data Imports are discussed later in this document.

PROFILE QUERY

Purpose: To query the profile information.

Access: From System Administration, click on Student Demographics >>Profile Query.

AccuSQL - Build 19.0.0

Close

Profile Query

What is your Major? Set

What is your Gender? Set

Ethnicity Set

What year of your degree are you in? Set

What is your Residency? Set

Interested in Tutoring? Set

Filters

Limit results to period:

Period: This Semester

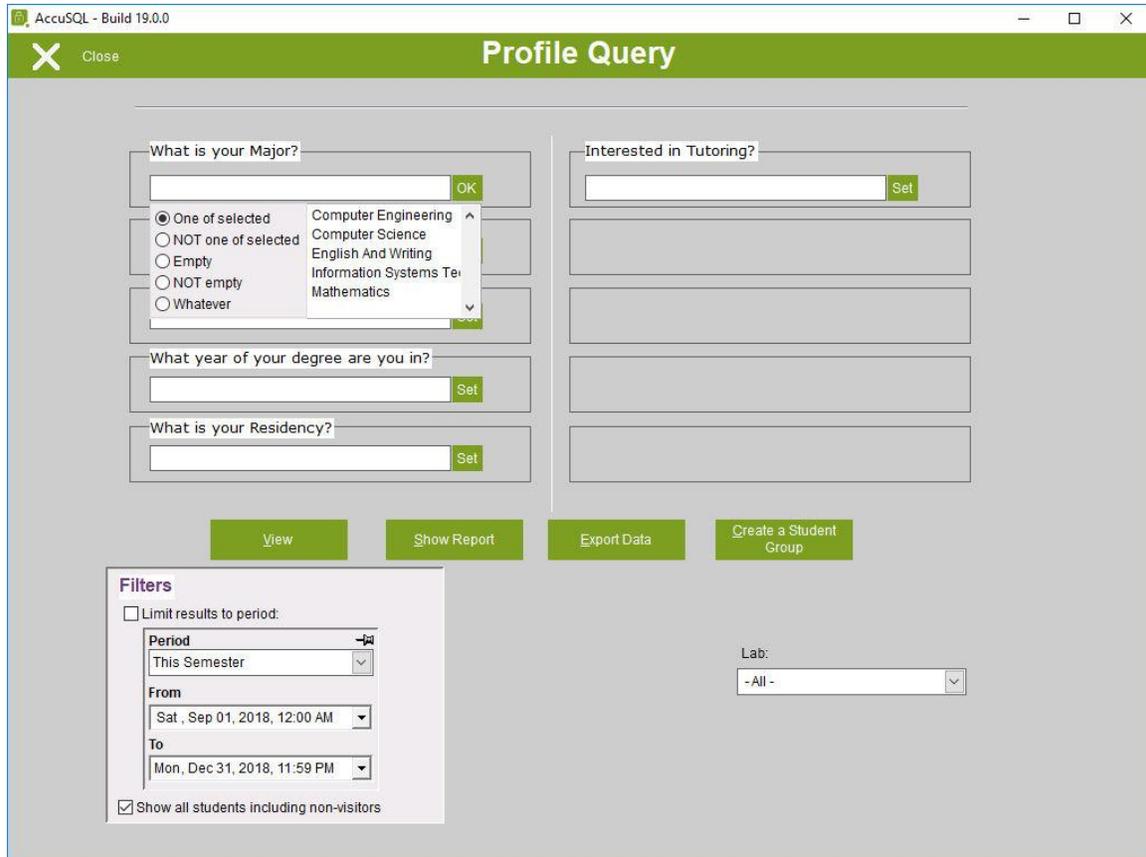
From: Sat, Sep 01, 2018, 12:00 AM

To: Mon, Dec 31, 2018, 11:59 PM

Show all students including non-visitors

Lab: - All -

This screen shows the profile questions as you entered them in the Profile Setup screen. Each answer has a button with the caption “Set” next to it. Click on this button to setup the query. A selection menu will pop up showing the available selection for that question:



Start by selecting your filter for this question. Here are the available filters:

- One of the selected: Show students who selected one of the highlighted answers.
- NOT one of selected: Show students who did not select one of the highlighted answers.
- Empty: Show students who did not answer the question.
- NOT Empty: Show students that did answer the question.
- Whatever: Do not use this option for filtering data at all (show all regardless of how they answered the question).

If you use one of the first two options, use the mouse to select the answers you want from the answers list box on the right. To select more than one answer, hold the <Ctrl> key down and click on the answers. When done, click on the “OK” button.

Do the same filtering on the other or combinations of questions as you like.

AccuSQL - Build 19.0.0

Close **Profile Query**

What is your Major?
Information Systems Technology

What is your Gender?
Female

Ethnicity

What year of your degree are you in?

What is your Residency?

Interested in Tutoring?

Filters

Limit results to period:

Period: This Semester

From: Sat, Sep 01, 2018, 12:00 AM

To: Mon, Dec 31, 2018, 11:59 PM

Show all students including non-visitors

Lab: - All -

If you would like to query based on the profile fields for a specific lab, select it from the Lab drop-down box, and then use those values to build your query. By default, the profile query values being displayed will be the ones for the current lab you are set to in System >> Lab IDs >> View/Modify Local Lab ID.

PERIOD FILTER

The Profile Query screen has a reporting period selection box. If you use this box, the screen will only show the profile data of students who signed in during the selected period.

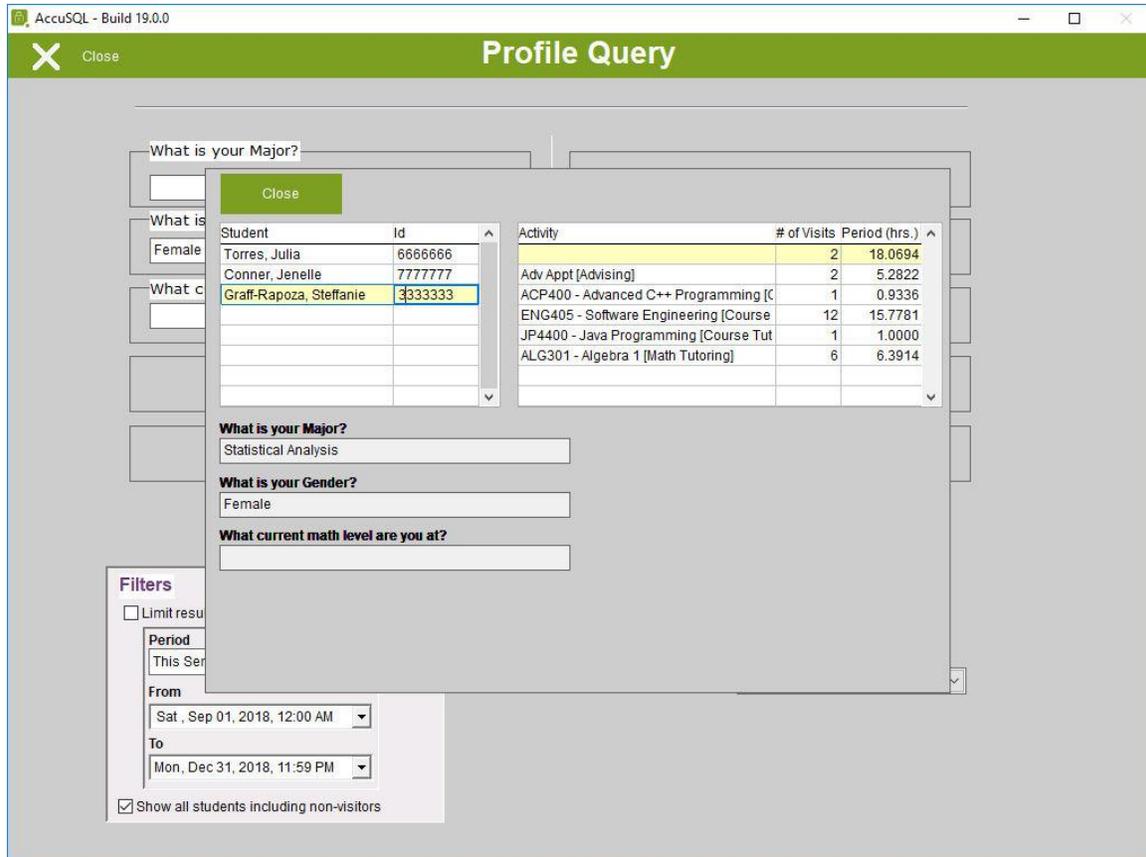
Tip: If you want to query all visitors, including those who did not visit your center, make sure to the box “Show all students including non-visitors”.

OUTPUT OPTIONS

When you are done with setting up the profile query filters, you can run the query and view the results in one of the following formats:

VIEW:

Click on the “View” button to see the results of your query on the screen:



The list box at the left side of the screen lists the students that passed the filter(s). You can select any of these students by clicking on the name. When you select a student, the activities the student used will show up in the “Activity” list box on the right side of the screen. The box lists each activity, the number of visits, and total time. Under the two list boxes, you will see the profile questions and the answers selected by the highlighted student.

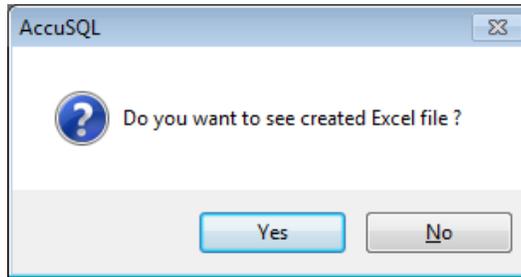
 **Tip:** If you click in the grid for Student or Activity, press the F6 key on the keyboard to immediately export that data to Excel.

SHOW REPORT:

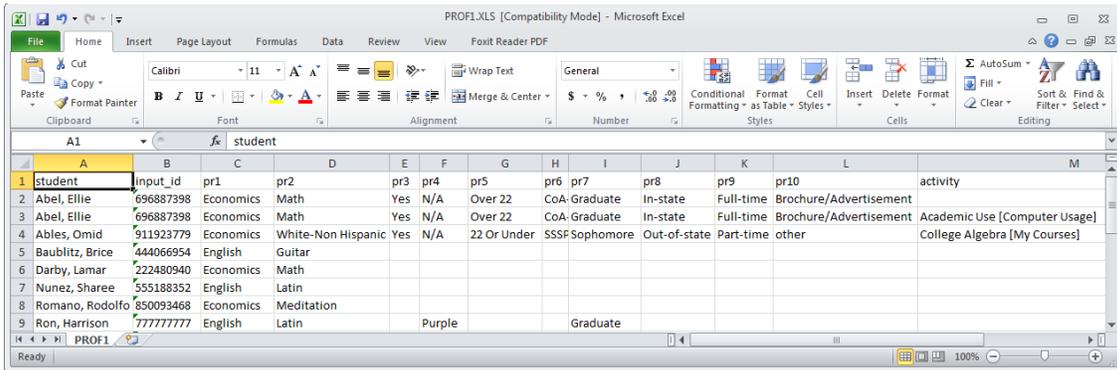
Click on the “Show Report” button to view students who meet your filter in a report. The report shows student’s name, sign-in ID, activity used, and number of visits and total time spent on that activity. The bottom of the report shows a count of the total visits and total time spent by all students that pass the filter.

EXPORT DATA:

Click on the “Export Data” button to send the data that meets your filter to an Excel file. You will see a browse window. Use this to select the location where you want to save the exported file and its name. Click on “Open” to proceed. AccuSQL/AccuTrack will save the file and will then ask you whether you want to see the file:



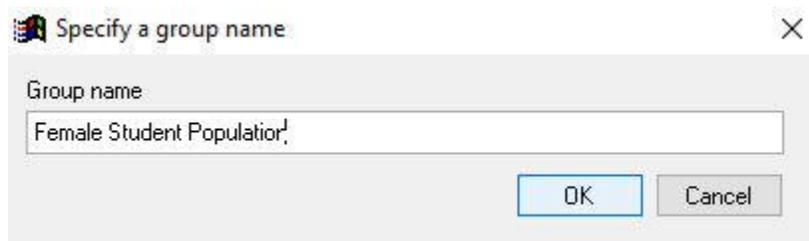
If you click on “Yes”, AccuSQL/AccuTrack will launch MS Excel and will load the file. The exported file will have the following fields: Student’s name, sign-in ID, profile answers (P1 column is first Profile Question answer, and so on), activity (with the category between two square brackets []), the number of visits of that student to this activity, and the total time (in seconds).



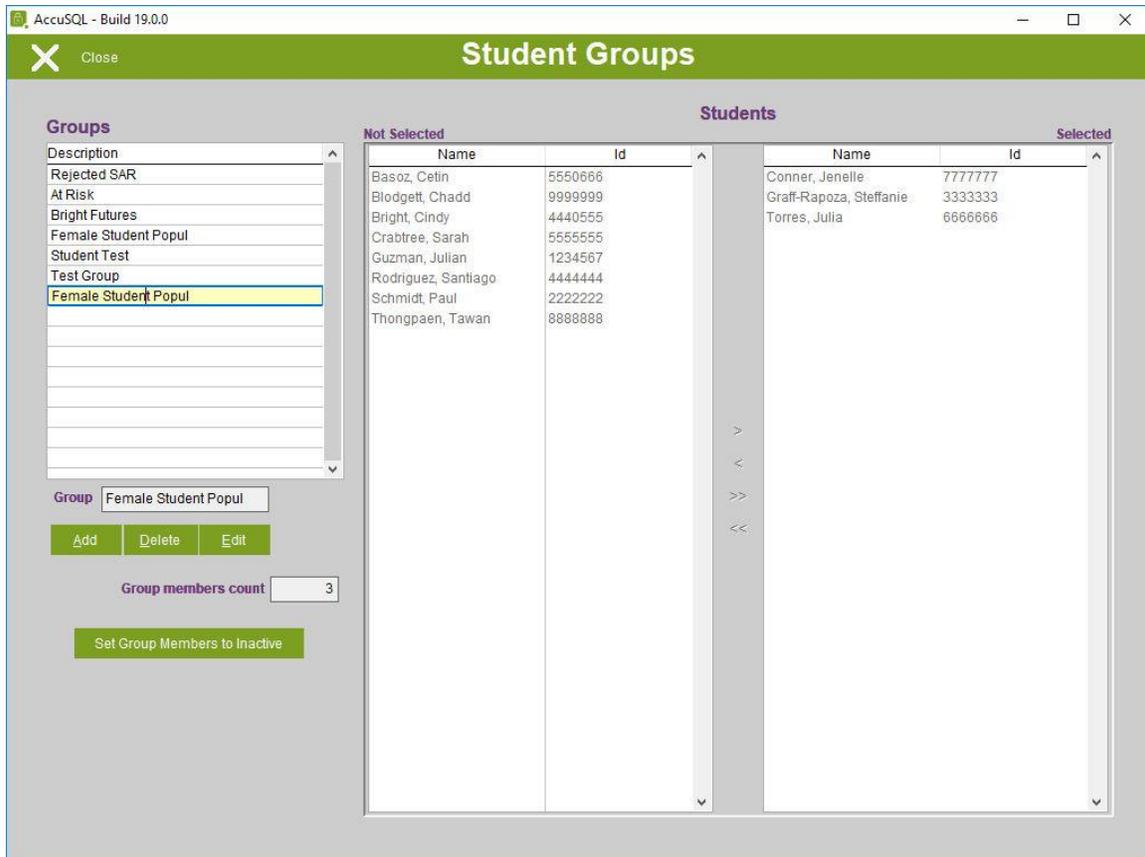
CREATE A STUDENT GROUP

Click on Create a Student Group to add the student returned from your query into group. Student Groups can be used in several places in AccuSQL/AccuTrack, including report filters.

In the Specify a group name box, enter the name for the student group, and then click OK.



You will receive a message indicating the group is created. The group will consist of the students that were returned by your profile query and is viewable in the Users >> Student Groups screen:

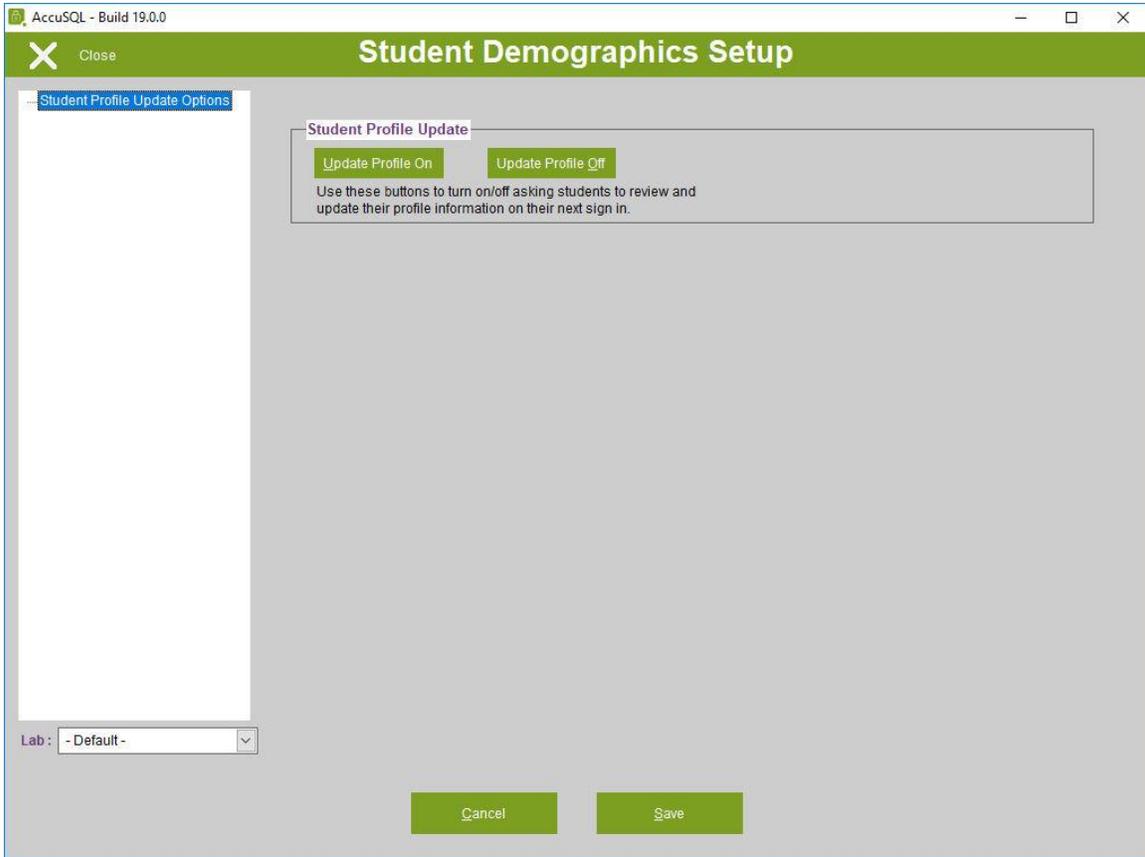


STUDENT DEMOGRAPHICS SETUP OPTIONS

If you click Student Demographics from the main System Administration screen, then select Setup, you will be presented with a Control Panel Options view that shows context specific options for your Student Demographics Setup screens.

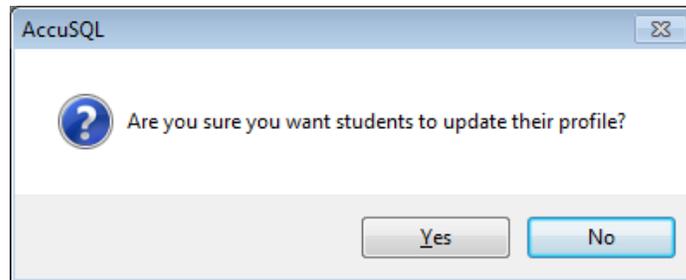
Here are the Control Panel options for Student Demographics Options in Setup:

Student Profile Update Options – Used to display the Modify Students screen when students sign in.

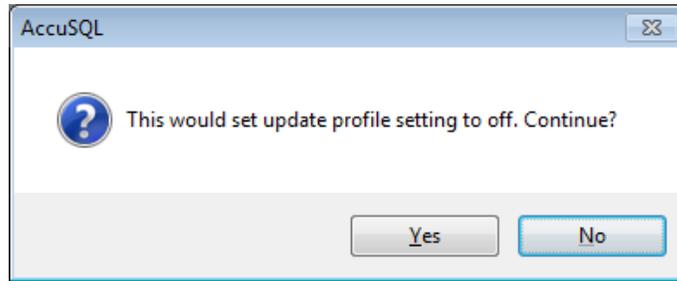


- Update Profile On: Click this button to activate the profile update mode. When this mode is activated, AccuSQL/AccuTrack will display the New Student screen pre-filled with the student’s information and will ask students to review and update this information if needed. This will happen once per student.
- Update Profile Off: This reverses the button above and cancels the profile update mode.

When you click the Update Profile On button, you will get a confirmation message. Click Yes to turn on profile updates.



And if you turn it off, you will receive a different confirmation.



When the student signs in for the first time after the profile update has been turned on, they will see the Update Info screen with their student record displayed. They will be required to fill in any of the required fields and then click Next to continue with the normal sign in process.

Update Info

Student ID: 3333333
Please fill in the information below then click on "Next"

Name			
First: <input type="text" value="Steffanie"/>	Middle: <input type="text"/>	Last: <input type="text" value="Graff-Rapoza"/>	E-mail: <input type="text" value="julliang@engineerica.com"/>
Contact			
<input type="text"/>	Address: <input type="text" value="299 West Lane Hwy"/>	City: <input type="text" value="Sanford"/>	FL <input type="text" value="32773"/>
Cell () - <input type="text"/>	<input type="checkbox"/> Do not send Text Messages	Birth Date <input type="text"/>	
What is your Major?	Interested in Tutoring?		
<input type="text"/>	<input type="text"/>		
What is your Gender?			
<input type="text"/>			
Ethnicity			
<input type="text"/>			
What year of your degree are you in?			
<input type="text"/>			
What is your Residency?			
<input type="text"/>			

SET APPOINTMENTS SCREEN

When you click on Set Appointments from the Main Menu, you will see the following options:

- Appointment Wizard: Use to set up an appointment for a student using the Appointment Wizard.
- Set by Activity: Use to set up an appointment for a student by first selecting the activity.
- Set by Student: Use to set up an appointment for a student by first selecting the student.
- Quick Scheduler: Use a quick method to setup an appointment for a student.
- Appointments Central: Use to access many appointments features all in one screen.

The following sections have more information on the above screens.

APPOINTMENTS WIZARD SCREEN

Purpose: To view open slots and schedule appointments.

Access: From System Administration, click on Set Appointments>>Appointment Wizard.

The Appointment Wizard offers a centralized interface for appointment scheduling. You can use the Wizard to select a class, or a class and a tutor, and see the available open slots. Either the Appointment Wizard or the Quick Scheduler (discussed in a bit) can be specified as the method students use to schedule Appointments through the main sign in screen when they click the Appointments button.

USING THE APPOINTMENT WIZARD

To use the Appointments Wizard, click on Set Appointments in System Administration then click Appointment Wizard.

Note: Students access the Appointment Wizard from the Main Sign in Screen by clicking the Appointments button, entering their ID, and then selecting Schedule New Appointment.

Tip: Remember you can use the Web Gateway MVC plugin so students can make appointments via the Web.

AccuSQL - Build 18.0.17

Close Appointment Wizard

(1) Select Category

- Advising
- Computer Use
- Course Tutoring
- Math Tutoring
- Success Center

(2) Select Activity

- Adv Appt
- Career Placement
- Degree Audit
- Grad Check
- Graduation Meeting
- New Student

(3) Select Tutor [Optional]

- View all tutors--
- Bright, Cindy
- Guzman, Julian

(4) Select Day(s) for the Appt. (Optionally change period)

Bright, Cindy

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday

Period: AS Entered

From: Mon, Dec 17, 2018, 08:12 AM

To: Mon, Dec 31, 2018, 11:59 PM

(5) Go to Next Page

Next Page

Open - empty
 Open - with others
 Closed - group
 Reserved - different activity
 Closed - exclusive
 Off

Appt.Duration is minimum 30 minutes and maximum 60 minutes

Appointments can start at 30 minutes increments

Start by selecting the category and activity from the list boxes on the left. If you like, you can also select a tutor from the *Tutor* list box, or optionally view all tutors schedules. Next select the day or days of the week by checking the appropriate day box, and click on **Next Page**. This will bring up the next step in the Appointment Wizard.

AccuSQL - Build 18.0.17

Close

Appointment Wizard

(1) Select Category

- Advising
- Computer Use
- Course Tutoring
- Math Tutoring
- Success Center

(2) Select Activity

- Adv Appt
- Career Placement
- Degree Audit
- Grad Check
- Graduation Meeting
- New Student

(3) Select Tutor [Optional]

- View all tutors--
- Bright,Cindy
- Guzman,Julian

(4) Select Day(s) for the Appt. (Optionally change period)

- Adv Appt
 - Monday
 - Tuesday
 - Wednesday
 - Thursday
 - Friday
 - Saturday
 - Sunday

Period: As Entered

From: Mon, Dec 17, 2018, 08:12 AM

To: Mon, Dec 31, 2018, 11:59 PM

(5) Go to Next Page

Next Page

Open - empty
 Open - with others
 Closed - group
 Reserved - different activity
 Closed - exclusive
 Off

Appt.Duration is minimum 30 minutes and maximum 60 minutes

Appointments can start at 30 minutes increments

You will see the above screen if you did not select a tutor, but instead selected View All Tutors. The screen shows the schedules of all tutors that work with the selected class. Use the vertical scrollbar (if present) to see all the schedules. You can also narrow your results by entering a desired time period for your appointment by using the filters above. Hit the refresh button to see the filtered results. Once you have located the appropriate appointment slot, select the tutor from the “Selected Tutor” drop-down box and click on “Next Page”. You will see schedule of the selected tutor.

The screenshot shows the 'Appointment Wizard' window with the following details:

- Window Title:** AccuSQL - Build 18.0.17
- Buttons:** Close, Refresh, Back, Next
- Filters:**
 - Adv Appt
 - Monday
 - Tuesday
 - Wednesday
 - Thursday
 - Friday
- Period:** As Entered
- From:** Mon, Dec 17, 2018, 08:12 AM
- To:** Mon, Dec 31, 2018, 11:59 PM
- Selected Activity:** Adv Appt
- Select Tutor:** (1) Select Tutor: --Select tutor--

Tutor	Date	07 AM	08 AM	09 AM	10 AM	11 AM	12 PM	01 PM	02 PM	03 PM	04 PM	05 PM	06 PM	07 PM	08 PM	09 PM	10 PM
Guzman, Julian	Wed, Dec 19, 2018	Open															
	Thu, Dec 20, 2018	Open															
	Fri, Dec 21, 2018	Open															
	Wed, Dec 26, 2018	Open															
	Thu, Dec 27, 2018	Open															
Bright, Cindy	Fri, Dec 28, 2018	Open															
	Wed, Dec 19, 2018	Open															
	Thu, Dec 20, 2018	Open															
	Fri, Dec 21, 2018	Open															
	Wed, Dec 26, 2018	Open															

Legend:

- Open - empty (light green)
- Open - with others (dark green)
- Closed - group (purple)
- Reserved - different activity (orange)
- Closed - exclusive (red)
- Off (grey)

Notes:

- Appt.Duration is minimum 30 minutes and maximum 60 minutes
- Appointments can start at 30 minutes increments

Now click Next and select the appointment start time by using the appropriate drop-down box. Next select the duration of this appointment from the “Select Duration” drop-down box. If the administrator permits it, you can also change the appointment’s type (exclusive or one-to-many). Finally, select the appointment’s dates from the selection list boxes. You can select a single date for a one-time appointment, or you can select more dates for a recurring appointment. You can also double click on an appointment block to select the date automatically.

AccuSQL - Build 18.0.17

Appointment Wizard

(6) Select Start Time:

(7) Select Duration: 30 (minutes)

(8) Select Appointment Type: Exclusive

Dates NOT Selected

(9) Select Appointment Dates

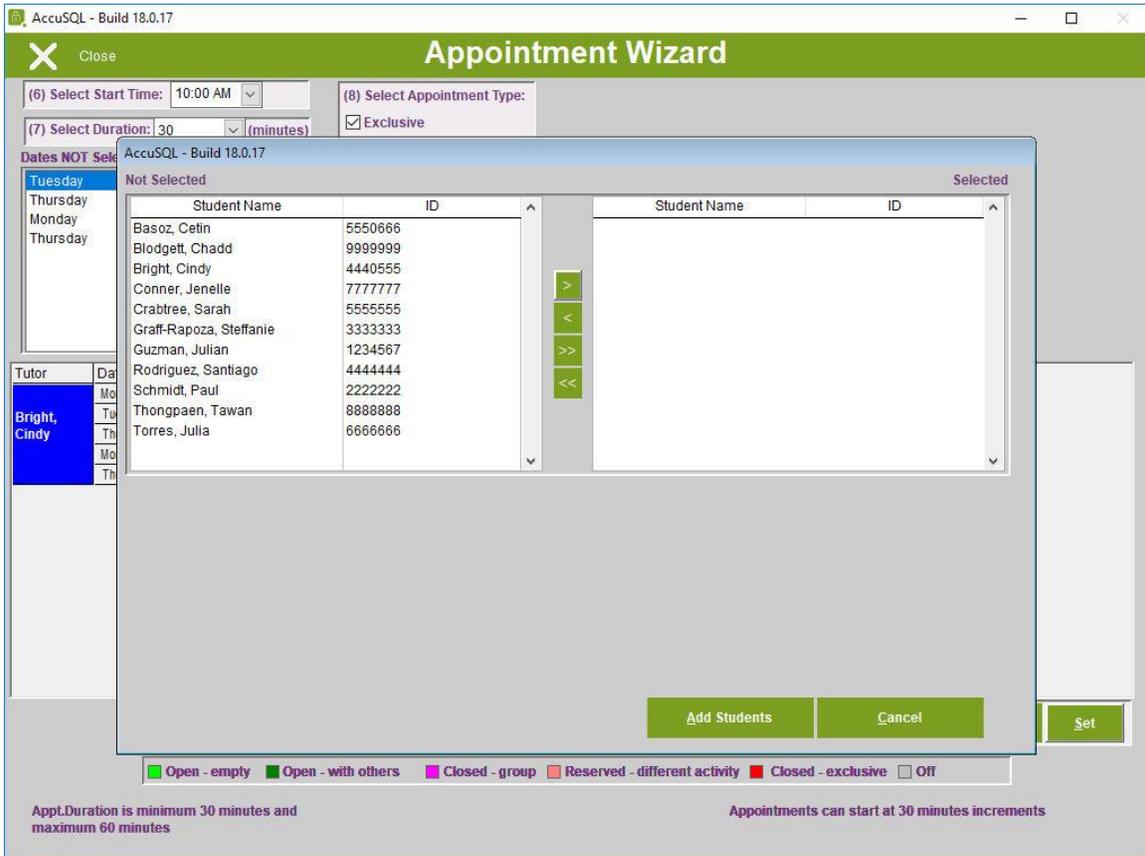
Tutor	Date	07 AM	08 AM	09 AM	10 AM	11 AM	12 PM	01 PM	02 PM	03 PM	04 PM	05 PM	06 PM	07 PM	08 PM	09 PM	10 PM
Bright, Cindy	Mon, Dec 17, 2018																
	Tue, Dec 18, 2018																
	Thu, Dec 20, 2018																
	Mon, Dec 24, 2018																
	Thu, Dec 27, 2018																

(10) Set Appointment

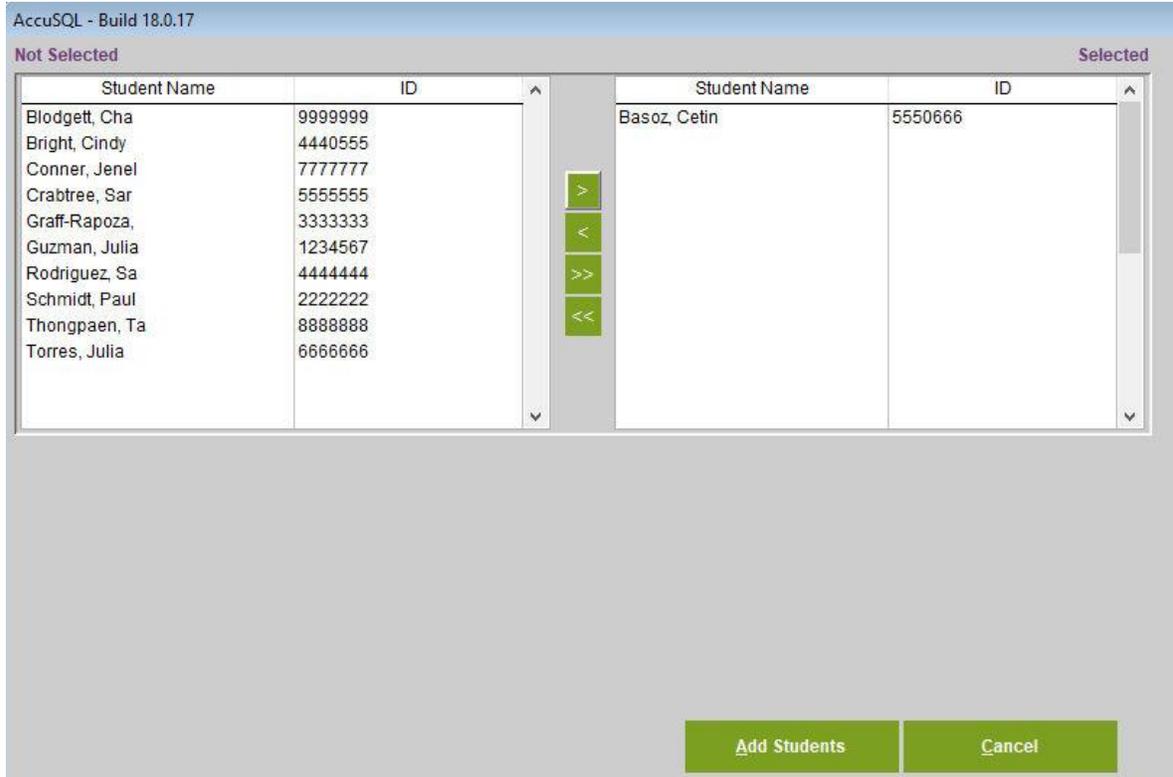
Open - empty
 Open - with others
 Closed - group
 Reserved - different activity
 Closed - exclusive
 Off

Appt.Duration is minimum 30 minutes and maximum 60 minutes Appointments can start at 30 minutes increments

When finished, click “Set” to schedule the appointment. If the appointment is being created from the main sign in screen by a student, then the student will automatically be displayed. If the Appointment Wizard is being accessed by an administrator, AccuSQL/AccuTrack will display a student selection screen and may also show an Appointment Notes screen, depending on the configuration.



Simply select one (or more if a non-exclusive appointment) student from the *SuperTable* on the left. AccuSQL/AccuTrack will check the selected student against defined appointment restrictions. If clear, the student's name will appear on the list box on the right:



After selecting the student or students, click on “Done” to schedule the appointment.

If on the other hand there is a restriction, you see a screen similar to this:

AccuSQL - Build 18.0.17

Not Selected
Selected

Student Name	ID		Student Name	ID	
Bright, Cindy	4440555	>> << >> <<	Graff-Rapoza, Steffanie	3333333	
Conner, Jenelle	7777777				
Crabtree, Sarah	5555555				
Guzman, Julian	1234567				
Rodriguez, Santi	4444444				
Schmidt, Paul	2222222				
Thongpaen, Tawan	8888888				
Torres, Julia	6666666				

Students violating center policies

Restrictions Codes

NTR - No Tutoring-Request

NR - Not Registered

ONS - Over NoShow limit

OCL - Cancellation over limit

ODL - Over Daily appts. limit

OWL - Over Weekly appts. limit

VD - Violates duration settings

O - Overlapping appointment

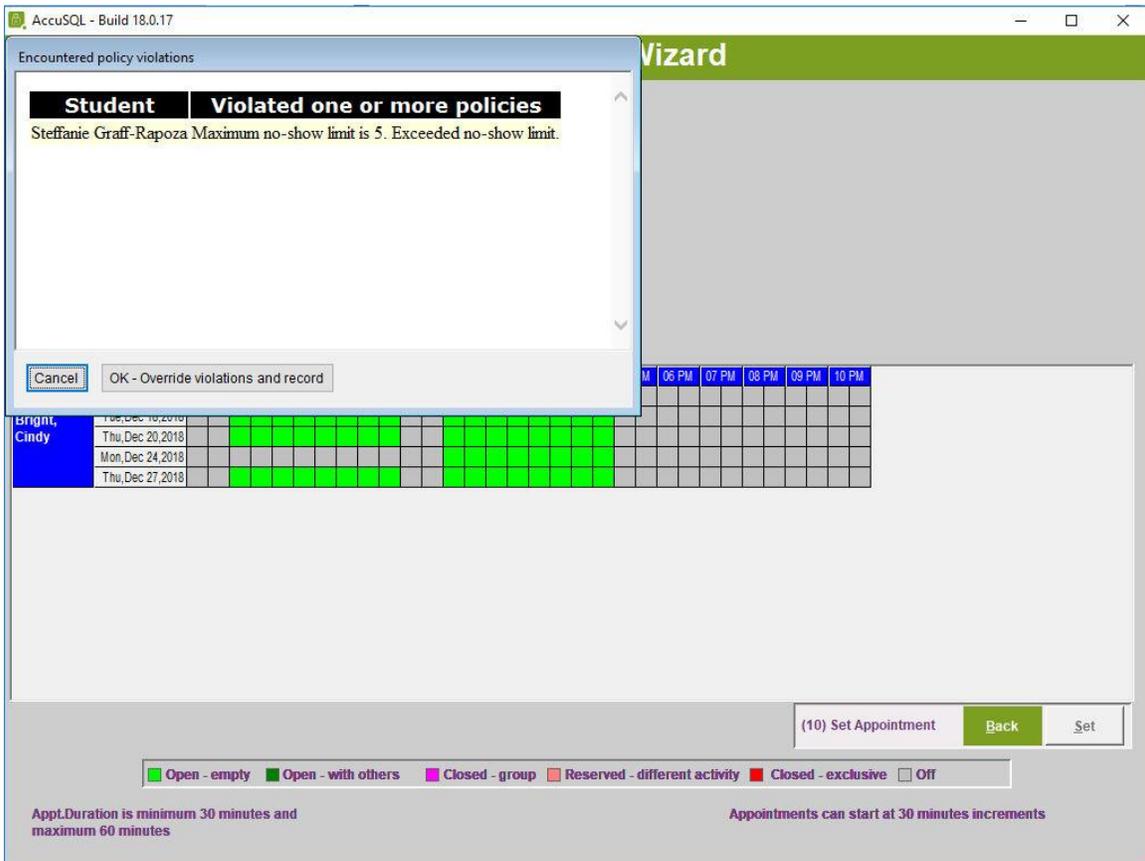
MX - Violates max student per appt.

CS - Overlaps activity schedule

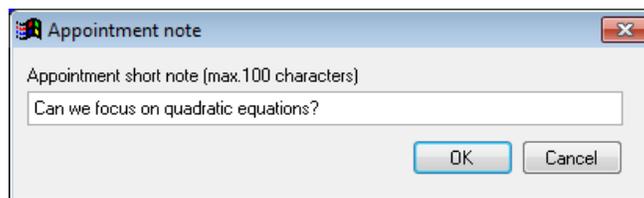
Student Name	Student Id	NTR	NR	ONS	OCL	ODL	OWL	VD	O	MX	CS
Graff-Rapoza, Steffanie	3333333	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>						

Add Students
Cancel

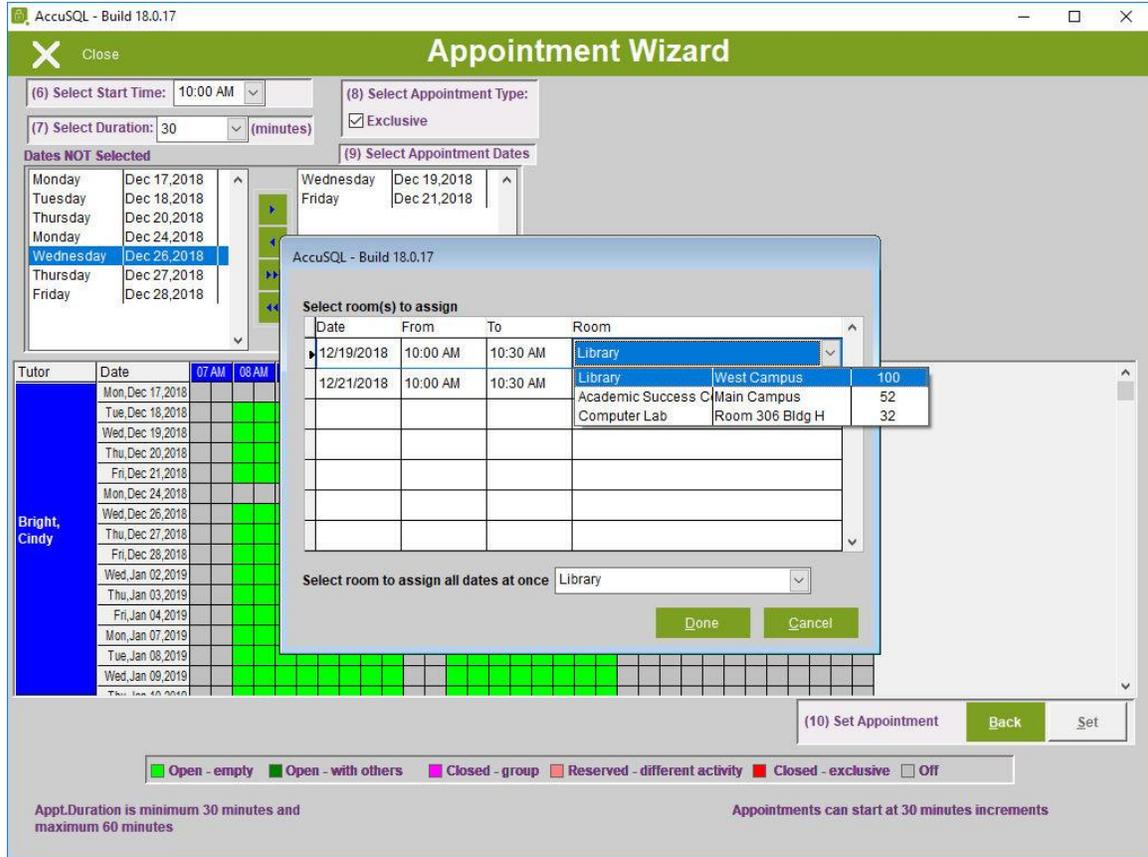
The list box on the bottom shows students with a restriction. For each name, there are several columns. If the box in the column is checked, the corresponding restriction applies to this student. The restrictions codes are shown on the left side of the screen. In the screenshot above, the student has an “NR” restriction, which means the student is not registered for the selected class and a restriction is set that students can only schedule appointments for their registered classes. You can still over-ride the restriction as an administrator and schedule the appointment anyway by clicking on “Schedule Appointment” and then “OK – Override violations and record” in the Encountered policy violations pop-up screen, or you can end the process by clicking on “Cancel”.



When you click on “Schedule Appointment” you will be asked if you would like to add any appointment notes through a pop up screen. The notes screen is optional and you can choose to add a short note, or turn notes off completely in the Set Appointments >> Setup >> Appointments Options screen by unchecking the Add a short note to appointment made checkbox.



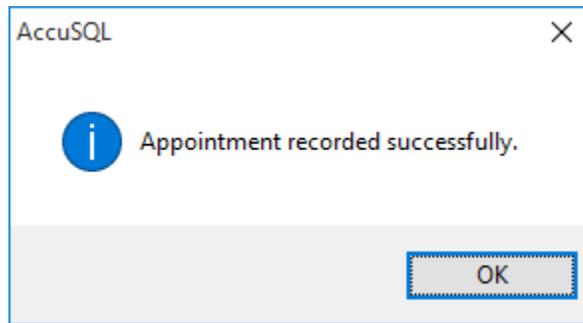
If you have the option to schedule rooms for appointments turned on and you are making the appointment as an admin and not a student, you will be able to assign a room for the scheduled appointments:



Using the above box, you can select a room for each appointment. **Note:** Rooms are created in the System >> Rooms screen. To select a room for an appointment, simply select the room from the Room drop-down in the same row. If you would like to assign all the appointments to the same room, use the drop-down box at the bottom of this screen. Click on “Done” to complete the room assignments. This will complete the appointment scheduling process.

You will then see a screen where you can print out an appointment confirmation slip. Do this by checking the appropriate student or tutor checkbox and clicking on “Print.” This step can also be bypassed by hitting the Cancel button and can be turned off completely in the Set Appointments >> Setup >> Email Confirmation Options screen by unchecking Show Appointment Confirmation Slip print-out box.

You will then see a confirmation message indicating the appointment was successfully created.



SET BY ACTIVITY SCREEN

Purpose: To quickly schedule appointments.

Access: From System Administration, click on Set Appointments>>Set by Activity.

Step 1 & 2: Select the category and activity and a tutor that provides it.

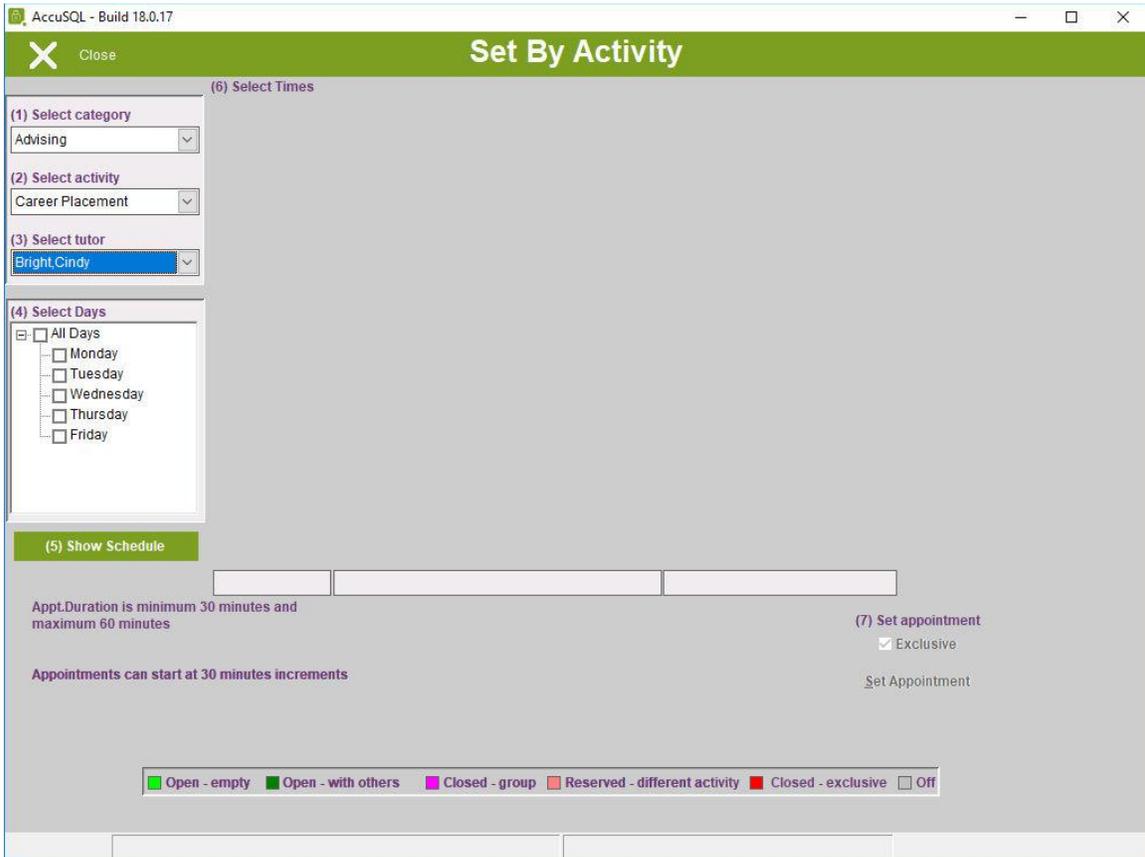
Start by selecting what you want to schedule an appointment for by selecting the Category and then the Activity from the drop-down boxes.

Step 3: Select the tutor

Next select the tutor you want to schedule the appointment with. Note that the categories and services are set up in the Modify Activities screen and the tutors that are available for the activity selected are based on the Activity Assignments you give the tutors in the Users >> Tutors screen and also on the tutors' schedules, setup in the Users >> Tutors >> Tutor Schedule and/or the Users >> Tutors >> Tutor Advanced Scheduler screen.

Step 4: Select the days of the week you want to schedule the appointment:

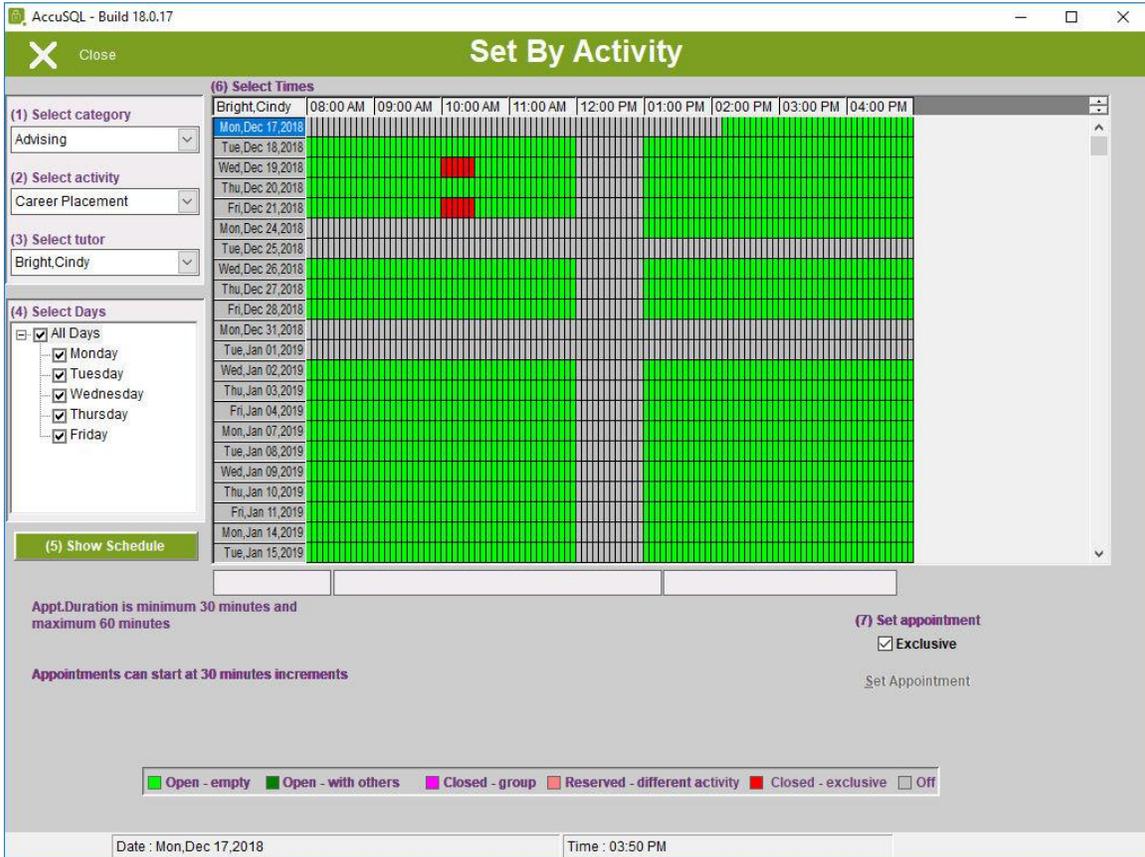
When you select a tutor in the step above, AccuSQL/AccuTrack will show the days of the week this tutor is available. For example, when we selected Morgan Freeman the “Select Days” box shows he is available Monday through Friday:



You can select any or all of these days. To select one of the days, click on its box. A check mark will appear in the box to indicate that it is selected. To quickly select all the available days, select All Days:

Step 5: Show the schedule

Click on the “Show Schedule” button to see the schedule of the selected tutor during the selected days. The schedule will appear in a graphical chart like this:



The name of the tutor appears in the upper left corner. Each row in this chart represents a date, which is shown in the left column. For example, the first row in the screenshot above represents Thursday, June 14, 2019. The columns represent the time. For example, the column first above shows the time period 12:00 PM to 1:00 PM.

Tip: Each hour in the chart is divided into 12 blocks. Each one of these blocks represents a 5-minute increment.

The time blocks are color-coded. Here’s what the colors mean:

BLOCK	COLOR	MEANING
	Light green	Tutor is available during this time slot. Currently no one is scheduled during this time slot, so it is available for either 1-to-1 or 1-to-many appointments.
	Dark Green	Tutor is available during this time slot. One or more students are already scheduled during this time slot, but there is room for more. The slot is only available for 1-to-many appointments.
	Pink	This is a 1-to-many time slot that reached its full capacity (i.e. maximum number of students allowed per tutor has been reached).
	Orange	Tutor is booked for a different service and not available during this time slot.
	Red	Tutor has a 1-on-1 (exclusive) appointment and not available during this time.
	Gray	Tutor is not scheduled during this time slot.

 **Tip:** The orange block is displayed only if you specify that 1-to-many students must be in for the same service. If you allow tutors to provide more than one service during the same time period, the pink slots will be shown in dark green instead.

 **Tip:** To see which students are scheduled for a certain appointment, pass the mouse pointer over this appointment. The list of students will appear in the “Student(s)” list box:

Step 6: Select an open time slot

With the appointment chart in front of you, select an open time slot for the appointment you want to schedule.

 **Tip:** When looking for an open time slot, look for green blocks.

To select the time slot, simply highlight the time with the mouse. For example, to select 9:00 AM to 10:00 AM, place the mouse pointer on the 9:00 AM block and click the mouse button and keep it down. Now drag the mouse button to the right until you reach the 10:00 block. If you want to schedule the same appointment over several days, simply drag the mouse down to select these days.

 **Tip:** AccuSQL/AccuTrack will show you the selected time and date in the selected time boxes under the appointment chart. Here's an example:

Step 7: Select appointment type:

After selecting the appointment time slots, specify the appointment type by using the “Exclusive” checkbox. If you want this appointment to be a 1-to-1 appointment, make sure the Exclusive check box is checked, otherwise, make sure the checkbox is not checked. Note that you can only change the default appointment type if the admin has enabled this feature in the Options screen.

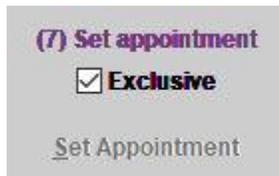


Step 8: Click on “Set Appointment”

To schedule the appointment, click on the “Set Appointment” button. When you do this, pay attention to the caption on this button. If all the times you selected for the appointment are open, the button will look like this:



However, if there is conflict somewhere, the button will look like this:



The button will look like this is if the Auto Cut-Off feature will be used when scheduling the appointments.



There are two reasons why this might happen:

1. One or more of the appointment slots you selected is already taken. For example, if you schedule an appointment every Wednesday from 9:00AM to 10:30 till the end of the semester, and on the second Wednesday there is already an exclusive appointment from 10:00 AM to 10:50, then your appointment cannot be set from 9:00 AM to 10:30. With auto cut-off, the software will schedule you from 9:00 AM to 10:00 AM on that day.

 **Tip:** When a conflict is detected, AccuSQL/AccuTrack will display a list box showing the conflicting times.

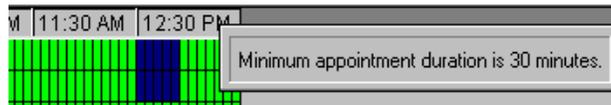
2. The start time selected is not allowed. For example, if the administrator sets the appointment's start time increment to 30 minutes, and you try to set an appointment at 9:25 AM, the auto cut-off function will activate, and your start time will be automatically changed to 9:30 AM instead of 9:25 AM.

 **Tip:** If you set an appointment and the appointment does not get set for the exact time you selected, then the auto cut-off was probably activated. The caption of the Set Appointment button will give you a hint when this happens.

 **Note:** The "Set Appointment" button will be grayed out if you have not selected a time slot that meets the appointment rules.



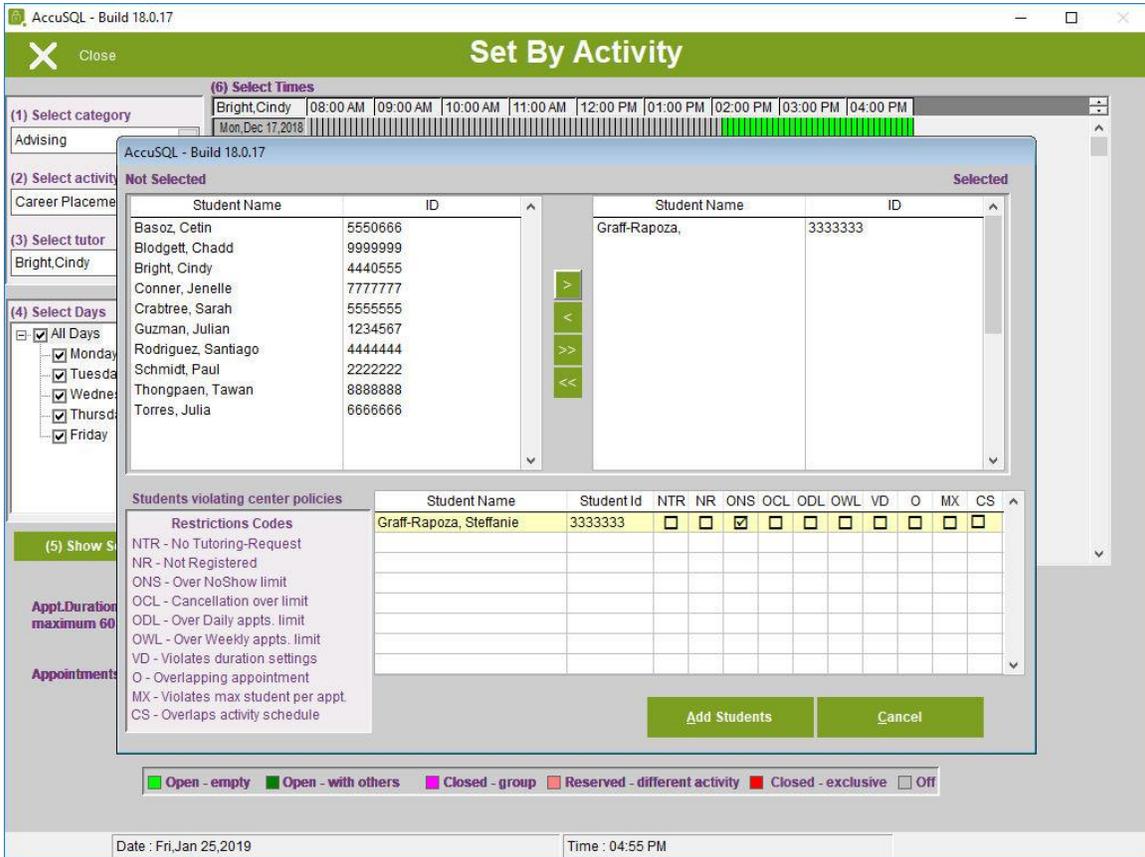
For example, if the minimum appointment duration is 30 minutes, and you select an appointment slot that is 20 minutes long, the "Set Appointments" box will be grayed out, and you will see a message when you select the time slot alerting you to the problem:



Step 9: Select the student(s)

When you click on the "Set Appointment" button, AccuSQL/AccuTrack will display a selection list box with your students. The *Selection List Boxes* make it easier to select more than one student for one-to-many appointments.

If the selected student has a restriction, you will see another *Selection List Boxes* that shows the restriction:



The list box on the bottom shows students with a restriction. For each name, there are several columns. If the box in the column is checked, the corresponding restriction applies to this student. The restrictions codes are shown on the left side of the screen. In the screenshot above, the student has an “NR” restriction, which means the student is not registered for the activity for which you are scheduling the appointment and you have that restriction activated. The following are the restriction codes used in this box:

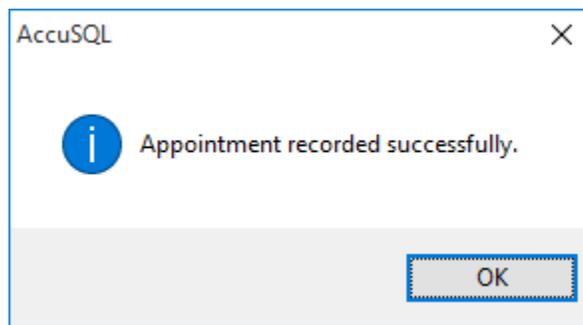
- NTR – No Tutoring Requests:
- NR – Not Registered: Restriction applies if admin selects the option to only allow registered students for appointments:
- ONS – Over No-show Limit: Student exceeded the maximum number of no-shows allowed.
- OCL – Over Cancellation Limit: Student exceeded the maximum number of appointment cancellations allowed.
- ODL – Over Daily appointments Limit: Student has other appointments on the selected day and the maximum number of daily appointment is exceeded.

- OWL – Over Weekly Appointments Limit: Student has other appointments on the selected day and the maximum number of daily appointments is exceeded.
- VD – Violates Duration settings:
- O – Overlapping Appointment: Student already has an appointment on the selected date and time.
- MX – Violates maximum student per appointment

You can still over-ride the restriction and schedule the appointment anyway by clicking on “Done”, or you can cancel the process by clicking on “Cancel”.

If you have the options turned on, you may be presented with a screen to add a short note, select a room, and/or print out a slip for the appointment. Please see the Appoint Wizard section for details on those screens.

After you are complete, you will get a confirmation screen indicating the appointment was created successfully.

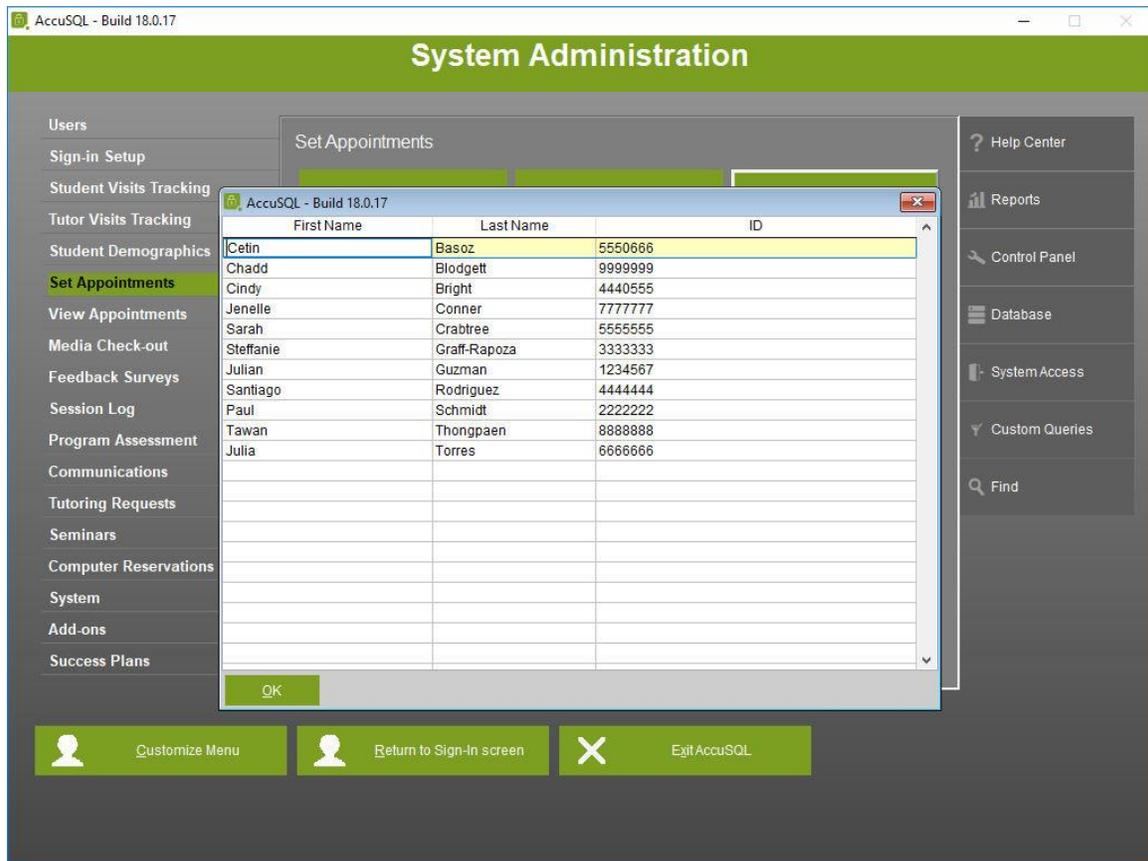


SET BY STUDENT

Purpose: Another method for quickly scheduling appointments.

Access: From System Administration, click on Set Appointments >>Set by Student.

First click on the student(s) you are scheduling the appointment for and then click OK.



From this point forward, the appointment scheduler behaves exactly like the Set by Activity option. Please see the previous section, Set by Activity for detailed information.

QUICK SCHEDULER

Purpose: Another method for quickly scheduling appointments.

Access: From System Administration, click on Set Appointments >>Quick Scheduler.

Click a Category on the left (1) and the activities listed for that category will appear in the (2) Select Activity list. Click the activity for which the appointment will be scheduled. Next, click the date when the appointment will occur. You can click the left or right arrows to scroll day by day, or click the drop-down box next to the date display to select a day from a calendar view.

Tip: If you do not see any tutors showing up in your open slots when you first open Quick Scheduler, check your Setup Appointments >> Setup >> Appointment Options to see if you have a value entered for “Do not allow setting appointments on the same day”.

A list of tutors that are available for the selected activity and for the selected day (based on the tutor activity assignments and tutor schedules you have created) will appear in the (4) Select an open slot display area.

To schedule the appointment, click on the O (which stands for Open) on a time slot adjacent to the desired tutor. The Scheduling Appointment box will appear:

AccuSQL

Quick Scheduler

(1) Select Category

- Advising
- Computer Use
- Course Tutoring
- Math Tutoring
- Success Center

(2) Select Activity

- Adv Appt
- Career Placement
- Degree Audit
- Grad Check
- Graduation Meeting
- New Student

(3) Select Date < Mon, Dec 17, 2018 >

(4) Select an open slot

Tutor	07 AM	08 AM	09 AM	10 AM	11 AM	12 PM	01 PM	02 PM	03 PM	04 PM	05 PM	06 PM	07 PM	08 PM	09 PM	10
Guzman, Julian									O	O	O					
Bright, Cindy									O	O	O					

Appt.Duration is minimum 30 minutes and maximum 60 minutes

Close

Appointments can start at 30 minutes increments

Based on your appointment rules (min and max appointment length settings you can click the Duration drop-down box to expand the appointment length. You can also add any notes for that appointment. Click the Schedule button to schedule the appointment. After you click Schedule, the system will send an appointment confirmation to the tutor and student and remove the O (open) slot from the appointment grid. If you are using Quick Scheduler as an admin, you will be asked to pick the student(s) for the appointment.

Note: If you use group appointments, then the O (Open) slot will remain until the max number of students in group appointment settings are reached, then the open slot will be removed.

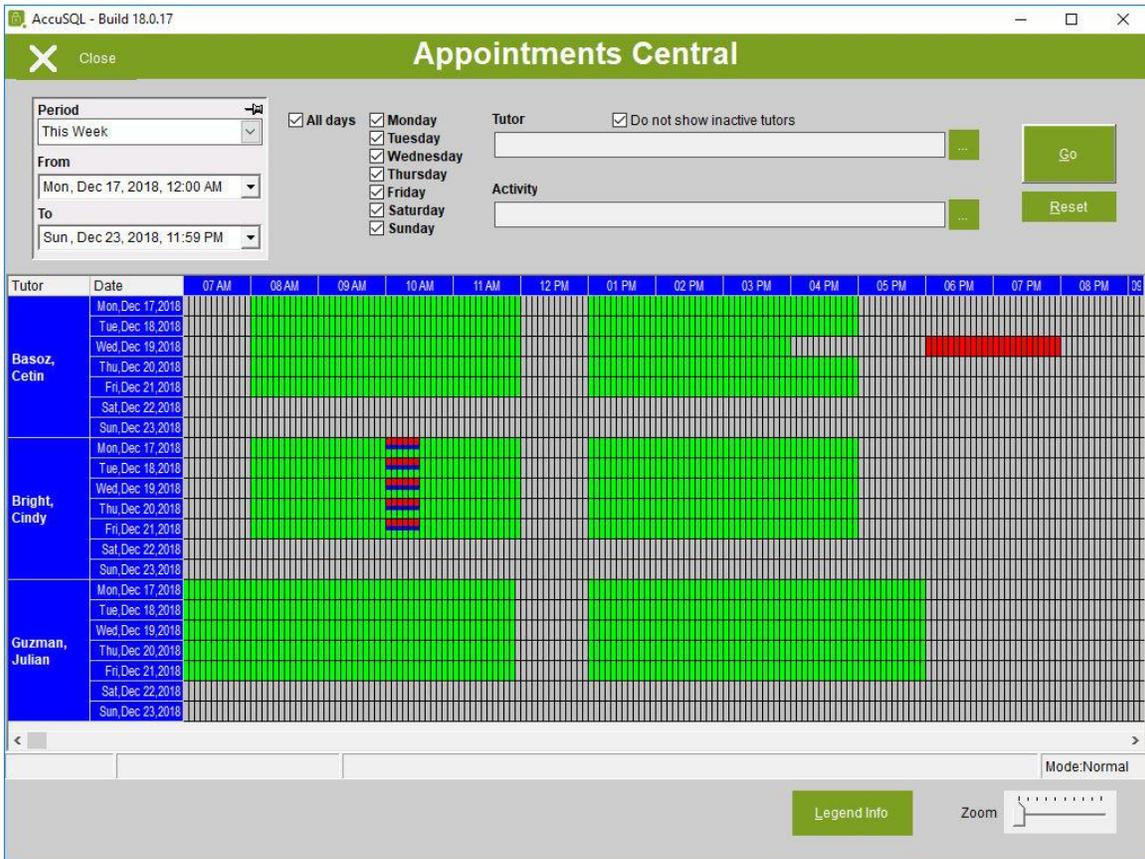
APPOINTMENTS CENTRAL SCREEN

Purpose: A centralized location for handling lots of appointment tasks in one place.

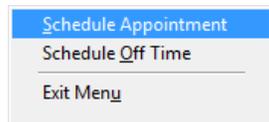
Access: From System Administration, click on Appointments>>Appointments Central

The Appointments Central screen allows you to filter appointment schedules based on tutor, activity, period of time and day of the week. If no filters are selected, all tutor schedules will be displayed when you click Go. If specific filters are selected, the screen will display a schedule that looks something like this when you set whichever filters and click Go.

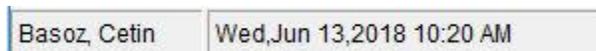
The grid shows available time slots in light green and also any scheduled appointments. There are several options available by clicking the mouse button in the grid. The options differ, however, depending where you click in the grid. If you click in the grid for dates/times that are in the past, for example, then you will get a message that only says "Exit Menu.", indicating there are no options for past dates/times.



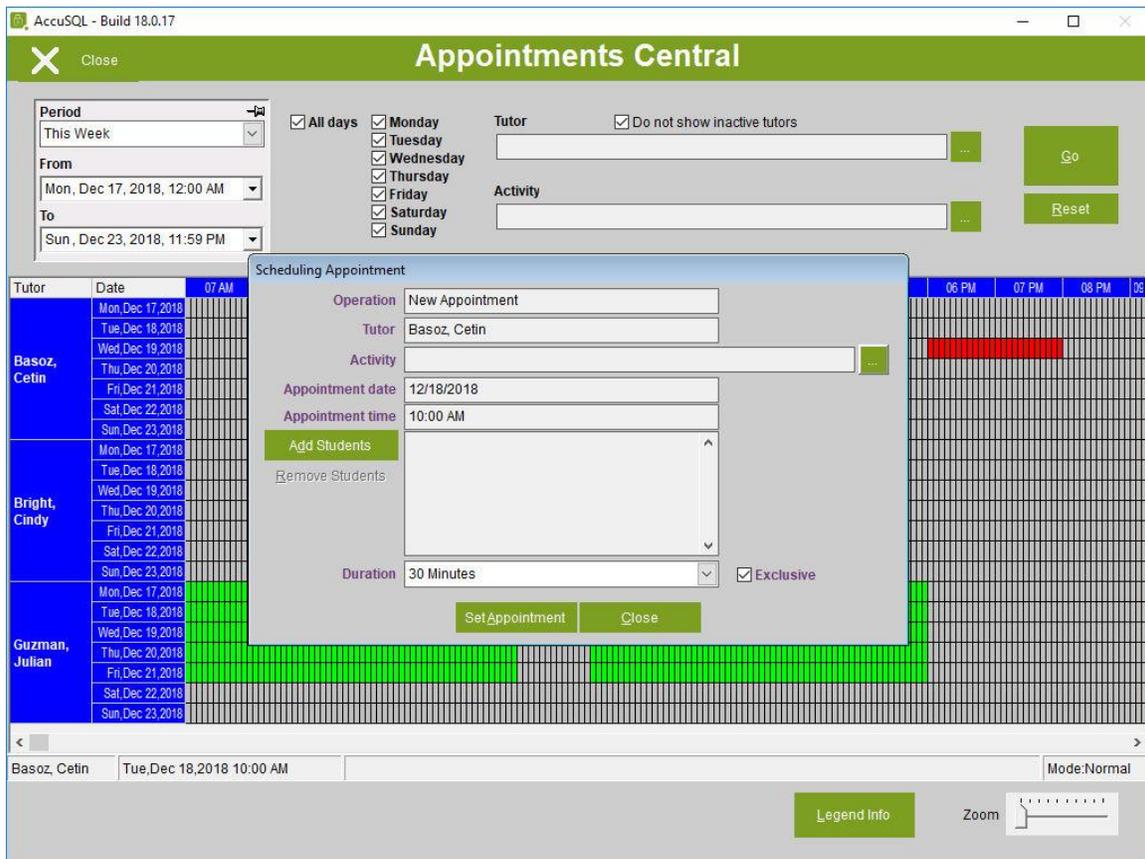
If you click in a light green portion of the grid on a date/time that is in the future, you will get the following pop-up menu choices:



Select Schedule Appointment to schedule an appointment starting in the time slot where the click originated. You can see exactly where you are clicking in the grid by looking at the status bar at the bottom of the grid.



If you click Schedule Appointment for the slot you want, the Schedule Appointment screen will open where you can create the appointment.



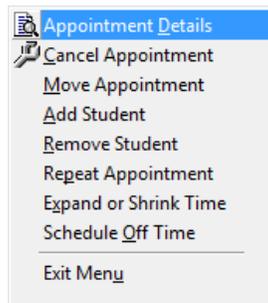
- **Operation** – System maintained field.
- **Tutor** – Will automatically select the tutor you are scheduling the appointment for as selected in the main grid.
- **Activity** – Click the ... button next to this field to select the activity (class) you are creating the appointment for.
- **Appointment Date** – This field will automatically be populated based on the date you selected in the main grid.
- **Appointment Time** - This field will automatically be populated based on the time you selected in the main grid.
- **Add Students** – Press this button to add one or more students to the appointment. If you do not allow group appointments, then only one student would be selected. If you allow group appointments, then you can add as many students as you have specified in the “max number of students in a group appointment” in your Set Appointments >> Setup screen.
- **Remove Students** – Allows you to remove student(s) that you have previously added.
- **Duration** – From the drop-down menu, select the length of the appointment. The scheduling min/max, and increments are specified in the Set Appointment Setup menu.

- **Exclusive** – Check this box if you want the appointment scheduled to be a one-to-one appointment with the tutor and student. This will prevent other students to be added to it later.
- **Set Appointment** – After you have entered the desired information above, click this button to create the appointment.

After you click Set Appointment, you may have the system setup to enter appointments notes, to select a room for the appointment, and/or print a confirmation slip. These options are configured in the Set Appointments Setup options.

AccuSQL/AccuTrack will then send out the appointment confirmation emails if you have it setup to do so and then you will be returned to the main Appointments Central screen with the appointment showing either in dark green (if a group appointment) or red if it is an exclusive appointment.

For a group appointment the following options are available:



- Appointment Details
- Cancel Appointment
- Move Appointment
- Add Student
- Remove Student
- Repeat
- Expand or Shrink Time
- Schedule Off Time
- Exit Menu

These options are discussed in more detail in the following sections.

Appointment Details

Click to view the specifics of the appointments in a table view.

Appointment Details					
Tutor Name	Basoz, Cetin				
Appointment Date	Tuesday, December 18, 2018				
Activity ID	Activity	Category			
ENG405	Software Engineering	Course Tutoring			
Student	From-To	Exclusive	Set		
			By	When	From Web
Crabtree, Sarah	10:00 AM - 10:30 AM	Yes	King, Supreme [Admin] [Staff]	12/17/2018 03:33 PM	No

Cancel Appointment

Click to cancel an existing appointment. This option will cancel the appointment for all students and for the tutor. If you click the radio button for Student in the Appointment is cancelled by: area, then the cancellation will count against all students for you rules about maximum cancellations restriction. This may not be fair in a group appointment, so you would likely click either the Tutor radio button or the Admin radio button. Either of these options will prevent the students from getting the cancellation counted against them. You can also enter a reason for the cancellation in the Reason to Cancel text area. After you are done, click Cancel Appointment(s) to complete the cancellation process.

Cancel Appointment

Appointment is cancelled by:

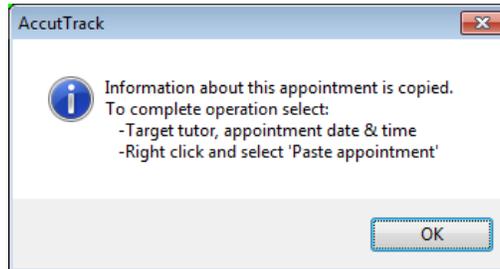
Student
 Tutor [Bright, Cindy]
 Admin [Super User]

Reason to cancel:

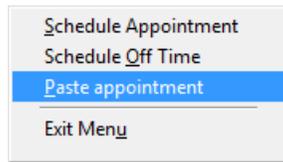
Cindy emailed and said there was a family emergency.

Move Appointment

Click to move the appointment's date and time to another date and time in the future. When you select this option, you will get a popup screen indicating that the appointment information is copied.



You can now right click in the grid (in the future) and then select the Paste Appointment option to move that appointment to the new date/time indicated.



The information from the original appointment will be moved to the new date and time indicated. Click the ... button to select the Activity and you can adjust any other information as needed.

After the move is complete, you will notice the appointment will now show up in main Appointments Central grid in its new date and time slot.

Add Student

Click to add students to the appointment. You will be able to add as many students as you have specified in your maximum number of students in a group appointment value in the Set Appointments >> Setup options.

After you select Add Student, you will be presented with a screen where you can move the students you want to add to the appointment to the Selected (right side) of the screen. Also notice in the title bar of the screen, you will see the number of students that can be added to the group appointment. In this example, I have two slots available because I have a maximum of four students in any group appointment and two students have already been added, hence two are remaining.

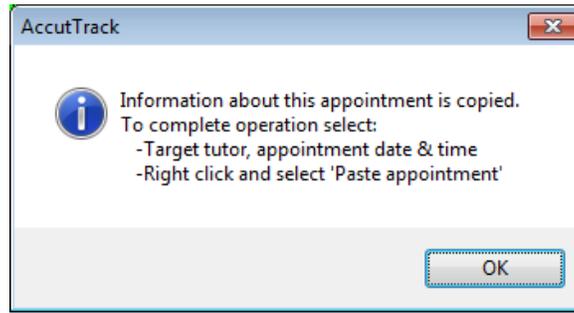
After you have moved the desired students to the Selected side, click Schedule Appointment to complete the process.

 **Note:** If all of the slots are already filled for the group appointment, this option will not appear in the pop-up selection list when you click the appointment from the Appointments Central grid.

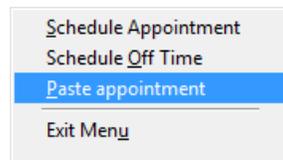
Remove Student

Repeat Appointment

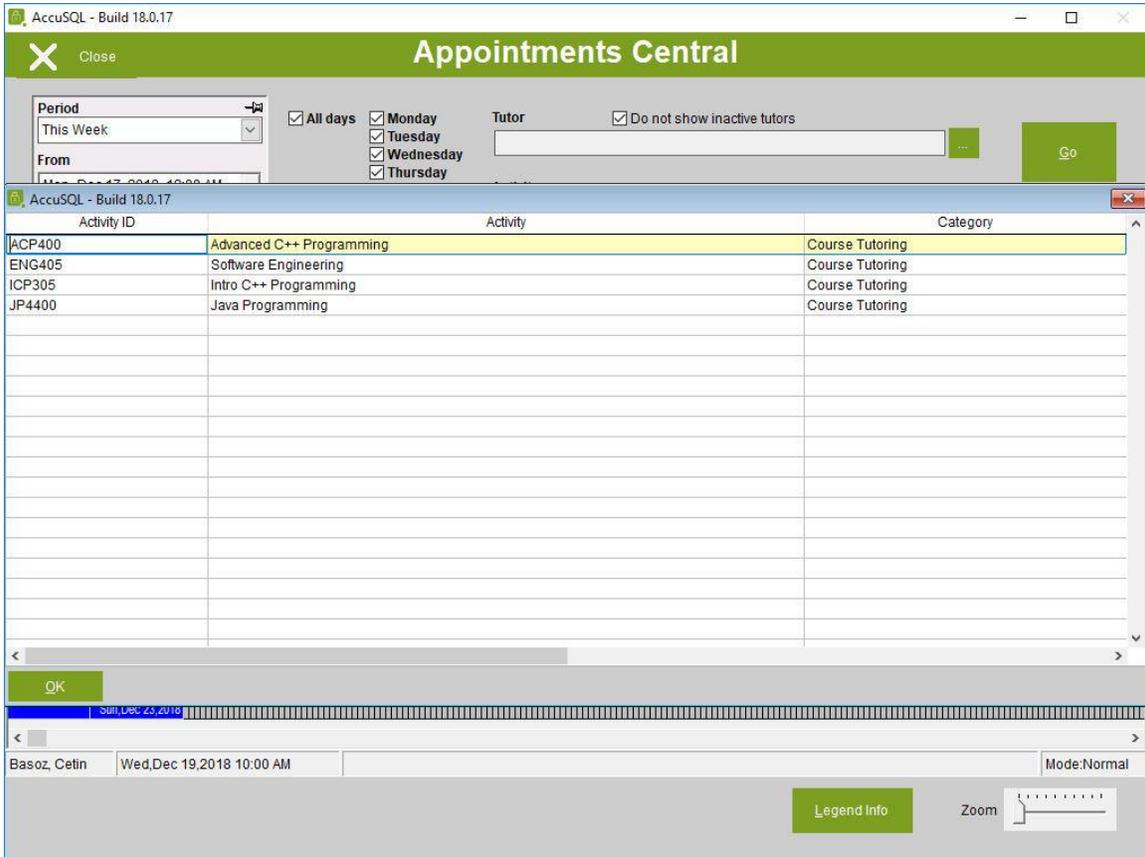
Click to copy the appointment's date and time to another date and time in the future. When you select this option, you will get a popup screen indicating that the appointment information is copied.



You can now right click in the grid (in the future) and then select the Paste Appointment option to move that appointment to the new date/time indicated.



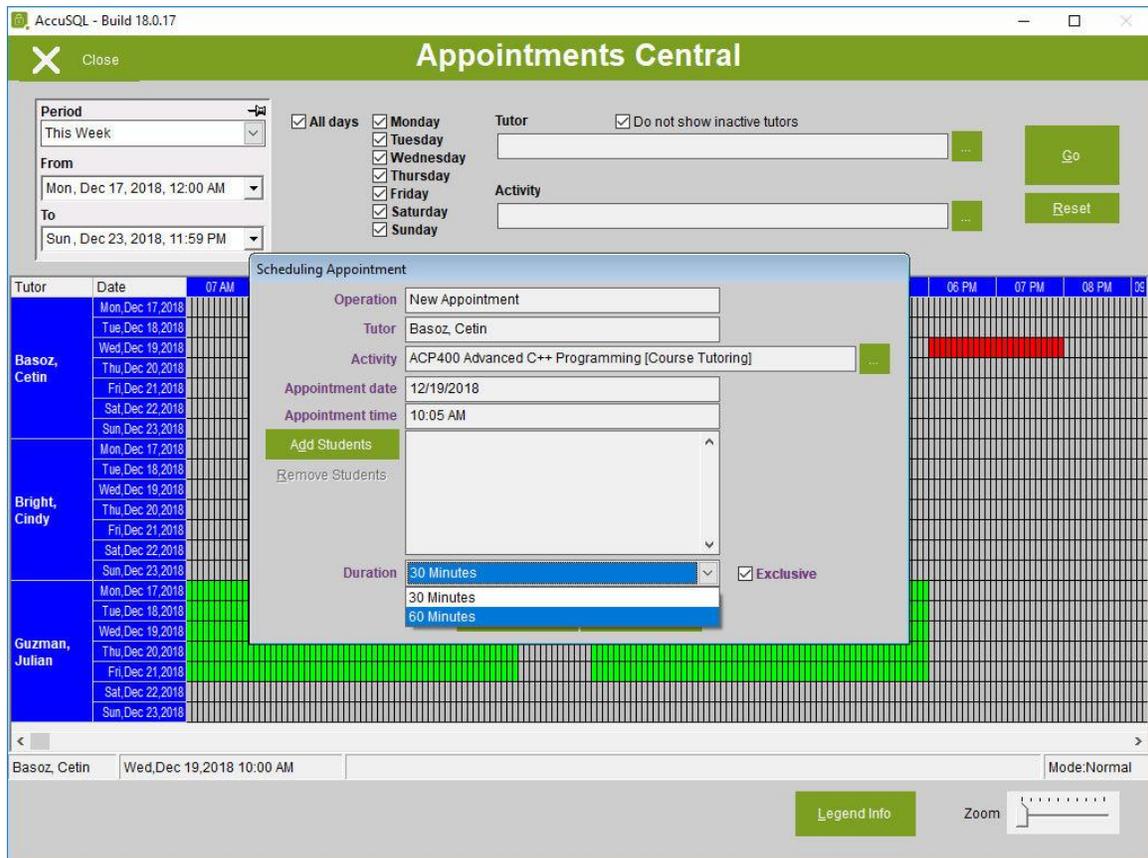
The information from the original appointment will be copied to the new date and time indicated. Click the ... button to select the Activity and you can adjust any other information as needed.



After the copy is complete, you will notice the appointment will now show up in main Appointments Central grid in its new date and time slot.

Expand or Shrink Time

Click to increase or decrease the length of time for the appointment. After you select this option, you will be presented with a screen that shows the appointment details. In the New Duration drop-down box, select the new length of time for the appointment.



After the time has been adjusted, you will notice the appointment will now show up in main Appointments Central grid in its updated length.

Schedule Off Time

Click to schedule a block of time as off time for the selected tutor. After you click this option, you will be able to enter the To period for the off time. The No Available From value is based on what you click in the main Appointments Central grid. You can also enter a reason for the off time. After you are done, click Set Off Time to complete the process.

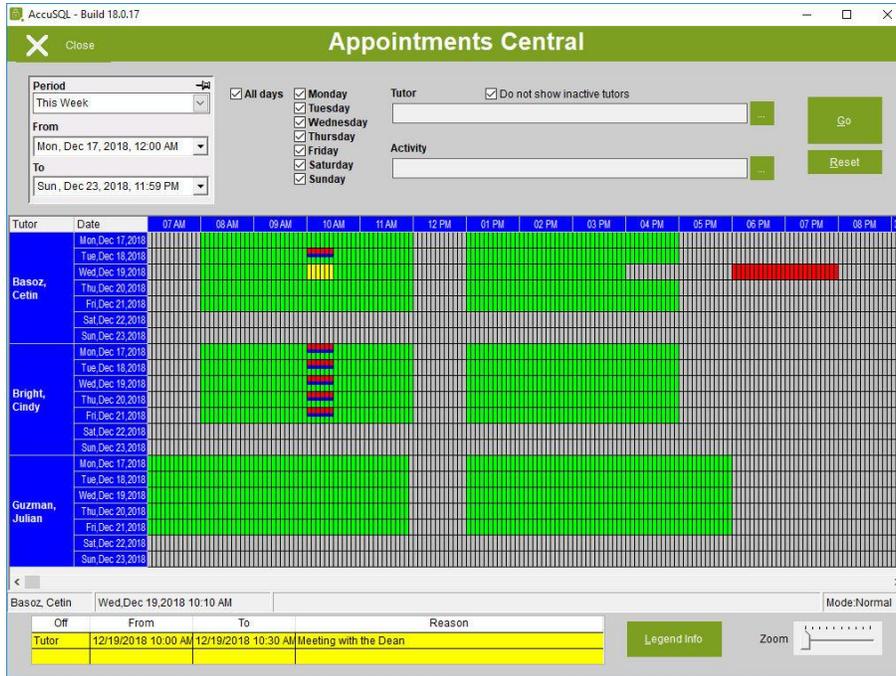
The screenshot shows the 'Appointments Central' window in AccuSQL - Build 18.0.17. The interface includes a search filter at the top with options for 'Period' (This Week), 'From' (Mon, Dec 17, 2018, 12:00 AM), and 'To' (Sun, Dec 23, 2018, 11:59 PM). There are checkboxes for 'All days' and individual days (Monday through Sunday). A 'Tutor' field is set to 'Basoz, Cetin' and 'Do not show inactive tutors' is checked. An 'Activity' field is empty. 'Go' and 'Reset' buttons are present.

The main grid displays tutor availability for three tutors: Basoz, Cetin; Bright, Cindy; and Guzman, Julian. The columns represent time slots from 07 AM to 08 PM. Green bars indicate available time, and red bars indicate off time. An 'Off Time Info' dialog box is open, showing the following details:

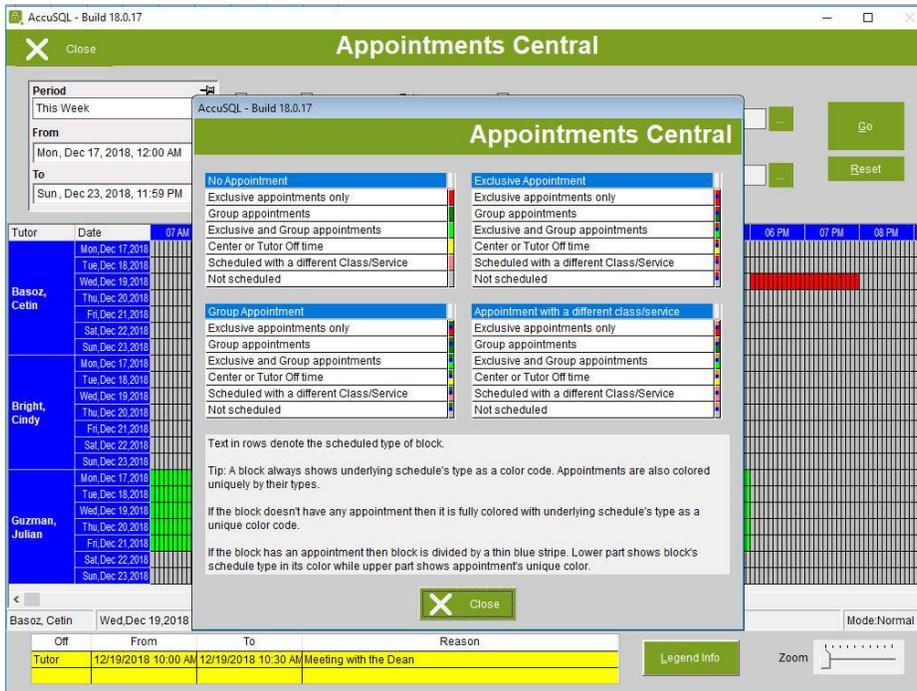
- Tutor: Basoz, Cetin
- Not Available From: Wed, Dec 19, 2018, 10:00 AM
- To: Wed, Dec 19, 2018, 10:00 AM
- Reason: Meeting with Dear

The dialog box has 'Set Off Time' and 'Close' buttons. At the bottom of the window, there is a status bar showing 'Basoz, Cetin' and 'Wed, Dec 19, 2018 10:00 AM', along with 'Legend Info' and 'Zoom' controls.

After the off time has been scheduled, you will notice the block of time you scheduled off will appear in yellow on the main Appointments Central grid.



Tip: Click the Legend Info button at the bottom of the Appointments Central screen to see what the various colors, or combinations of colors, on the grid mean.



For an exclusive appointment (colored in Red in the Appointments Central grid), the options are exactly like those you would see when you click on a group appointment, with the following exceptions:

- Add Student Details – Since it is an exclusive appointment, there would be no need to add more students to the appointment.
- Remove – Since it is an exclusive appointment, there would be no need to remove the student from the appointment. In this case, you would select Cancel Appointment or perhaps Move Appointment.

SET APPOINTMENTS SETUP OPTIONS

Before creating appointments, you will need to enter your tutors, their schedules, and the services they provide (their activity assignments). See other sections in this manual for instructions on how to do this. You will also need to set up your appointments preferences as explained below.

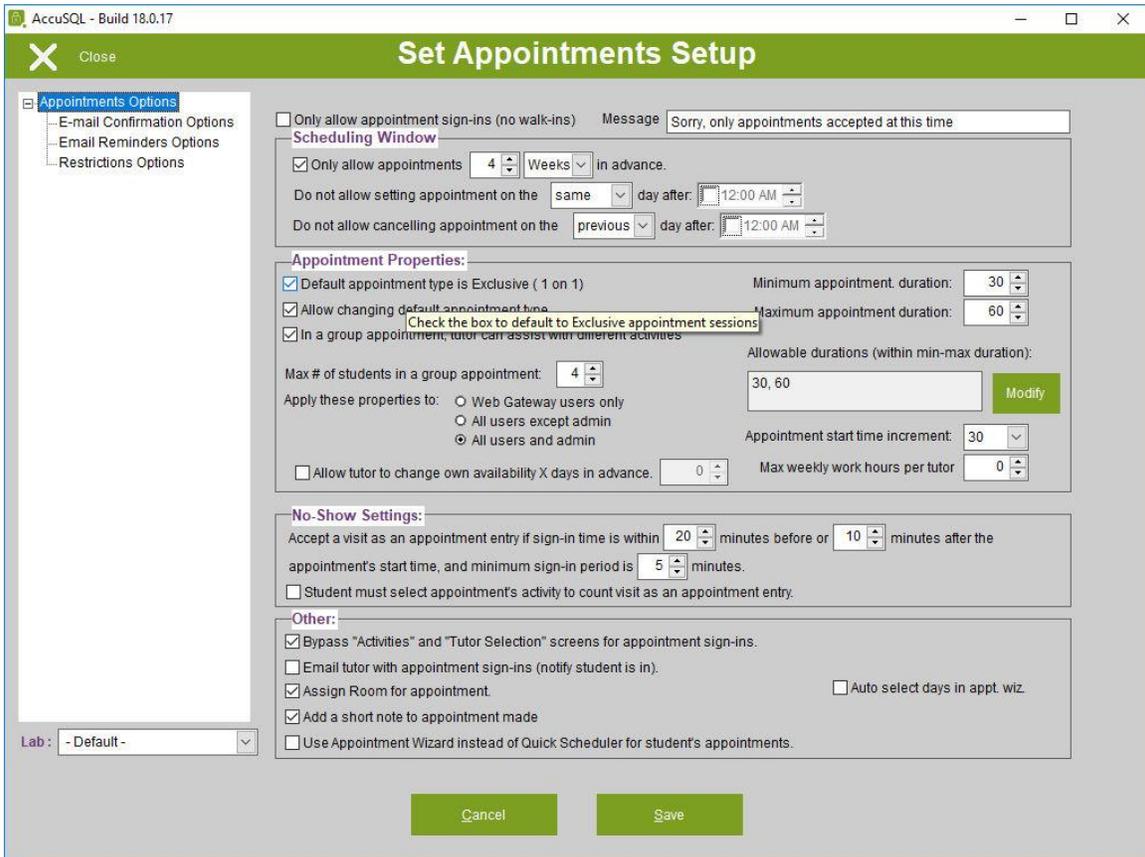
If you click Set Appointments from the main System Administration screen, then select Setup, you will be presented with a Control Panel Options view that shows context specific options for your Set Appointments screens.

Here are the Control Panel options for Set Appointments in Setup:

- Appointments Options – Used to configure how appointments can be scheduled, including when and for how long. Also used to setup how you handle group appointments and to make rules to determine how early or late the student can be and still receive credit for the appointment.
- Email Confirmation Options – Used to configure the various emails that go out for students and tutors when appointments are created, rescheduled, or cancelled.
- Email Reminders Options – Used to configure the emails that can go out to students reminding them of their upcoming appointments and/or configure the emails that go out when students fail to show up appointments.
- Restrictions Options – Used to configure various appointment restriction settings.

APPOINTMENTS OPTIONS

To access the Appointments Setup options, click Set Appointments in System Administration, then the Setup tab. The Appointments Options screen should be selected by default. If not, click on it on the left of the Options screen.



Only allow appointment sign-ins (no walk-ins): If this option is checked, AccuSQL/AccuTrack will only allow students to sign in if they are signing in for an existing appointment. Students who have not scheduled an appointment in advance will not be able to sign in.

Only allow appointments X in advance: This is the maximum number of days or weeks in advance that an appointment can be scheduled. For example, if you set this value to 2 weeks, appointments can be scheduled up to 2 weeks in advance. If you don't use this option, AccuSQL/AccuTrack will allow appointments until the end of the semester without restrictions on how far in advance they can be scheduled.

Do not allow setting appointment on the X day after X: Use these settings to specify the cut off time for scheduling a new appointment. For example, if you select "Same" and 6:00 AM, students will not be able to schedule appointments for the same day after 6 AM.

Do not allow cancelling appointment on the X day after X: Use these settings to specify the cut off time for appointment cancellations. For example, if you select "Previous" and 12:00 AM, the ability for students to cancel appointments will end at 12:00 AM on the day before the appointment.

Default appointment type is Exclusive (1 on1): Use this option to indicate the default appointment type. If checked, the default appointment will be exclusive (1 tutor working with 1 student). If not checked, the default appointment type will be a group appointment.

Allow changing default appointment type: If you want students to be able to change the appointment type (from group to exclusive or vice-versa), check this box.

 **Tip:** If you only do one type of appointments in your center, set the default appointment type to the allowed type and uncheck the "Allow changing default appointment type" box. For example, if you only do 1-on-1 appointments check the box "Default appointment type is Exclusive" and uncheck the box "Allow changing..." This will restrict the appointments to only the type you use.

Minimum and Maximum appointment duration: Use these boxes to set the minimum and maximum appointment duration. For example, the screen above shows that the minimum allowed appointment type is 30 minutes, and the maximum is 60 minutes.

 **Tip:** If the duration of appointments at your center is fixed, set the minimum and maximum values to this fixed duration. For example, if all your appointments are always 30 minutes long, set the minimum and maximum appointment duration to 30.

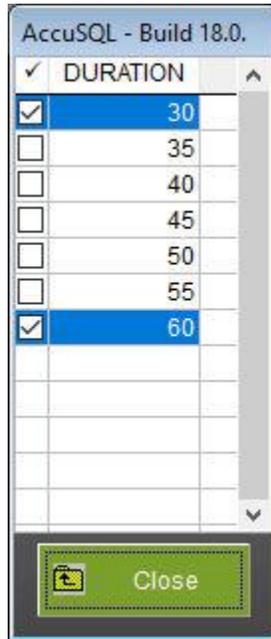
In a group appointment, tutor can assist with different activities: If this option is checked, tutors will be able to help students with different classes during the same time slot. For example, a tutor who helps with Algebra and Calculus can meet with students from both these classes during the same time slot. If this option is not checked, then the tutor will only be able to provide assistance with a single class (the first class selected for that time slot) during the same time slot.

Max # of students in a group appointment: Use this option to specify the maximum number of students than can have an appointment with the same tutor during the same time slot. For example, if this value is set to 4, the tutor can meet with up to 4 students at the same time slot. This option would only apply if you allow for group appointments.

Apply these properties to: If one of these options is checked, the previous appointment restrictions will only apply to the selected option: Web Gateway users only, All users except admin, All user and admin.

Allowable durations (within min-max duration)

This setting determines the scheduling blocks that can be selected within the minimum and maximum appointment duration settings. Click the Modify button to select the blocks within the min/max.



Appointment start time increments also come into play here. So for example, let's say we are set to min 30, max 60, appointment start time increments of 30 and allowable durations of 30 and 60.

When a student, schedules the appointment via AccuSQL/AccuTrack or Web Gateway for that matter, the settings would be reflected as such:

So the appointments start every 30 minutes and can be scheduled on the hour or on the half hour for either 30 or 60 minutes (notice the Duration drop-down box).

Now let's change the allowable duration to be 30, 45, and 60. In this case, the appointments are still allowed on the hour and half hour but now a 15 minute duration is allowed.

Appointment start time increment: Use this value to set the start time increment of each appointment. For example, if you set this value to 15, appointments can only start at one of the following times: Top of the hour, 15 minutes after the hour, 30 minutes after the hour, or 45 minutes after the hour. AccuSQL/AccuTrack will enforce this value in the Appointments screen automatically via the auto cut-off features. For example, if you set this value to 15 and the user selects an appointment period that starts 10 minutes after the hour, AccuSQL/AccuTrack will automatically change this to 15 minutes after the hour.

Max weekly work hours per tutor: Use this spinner box to enter the maximum weekly appointment hours per tutor. Zero means no maximum is set. Any other value will set the maximum weekly hours. Once a

tutor reaches this maximum, he or she will no longer appear in the appointment scheduling screen. In other words, the tutor will no longer be available for appointments that week.

Accept a visit as an appointment if sign-in time is within X minutes before or X minutes after the appointment's start time and the minimum sign-in period is X: This option controls how appointment's no-shows are calculated. The first two values define the appointment's sign-in window. If the student does not sign in during this window, he or she will be considered a no-show. For example, if the first value is 20 and the second value is 15 and the appointment's start time is 9:00, then the appointment window is 8:40 to 9:15. The third value defines the minimum sign-in period for the appointment. For example, if this value is 10, then sign-in period must be at least 10 minutes.

Note: Here's how AccuSQL/AccuTrack calculates the appointment's sign-in period for **no-show determination**:

Sign-in Period = End Time - Start Time, where:

End Time = earlier of (sign-out time and appointment's scheduled end time)

Start Time = later of (actual sign-in time and the appointment's scheduled start time).

Note: A student must be signed in for a period that includes some time of the actual appointment, else he/she will be considered a no-show. For example, if a student has an appointment from 9AM to 10AM and then signs in at 8:45AM and then signs out at 8:59AM, then the appointment will be a no show since the student signed out one minute before the appointment actually started.

Student must select appointment's activity to count as an appointment entry: If this option is checked, then the student must sign in to the appointment's activity to be considered as present for the appointment. If this option is not checked, then student can sign in to any class and still be considered as present for the appointment (as long as the sign-in was during the appointment window).

Bypass Activities and Tutor Selection screens for appointment sign-ins: If this option is checked and the student is signing in during his or her appointment's window, AccuSQL/AccuTrack will sign the student into the appointment's activity and tutor automatically. For example, if the appointment is scheduled for Tutoring - College Algebra with Cindy Bright, AccuSQL/AccuTrack will automatically sign the student to this activity and tutor without asking the student to select them. **Note:** At sign in, the student will get a message indicating they are signing in for the appointment but he/she will not be required to select an activity or a tutor.

Email tutor with the appointment sign-ins (notify student is in): Check this box if you want AccuSQL/AccuTrack to automatically send an email message to the tutor when a student signs in for a scheduled appointment.

Assign Room for appointment: If you want to schedule a room for appointments, make sure this checkbox is checked. Rooms are setup in the System >> Rooms screen. **Note:** Rooms are only assigned when an admin makes the appointment for the student.

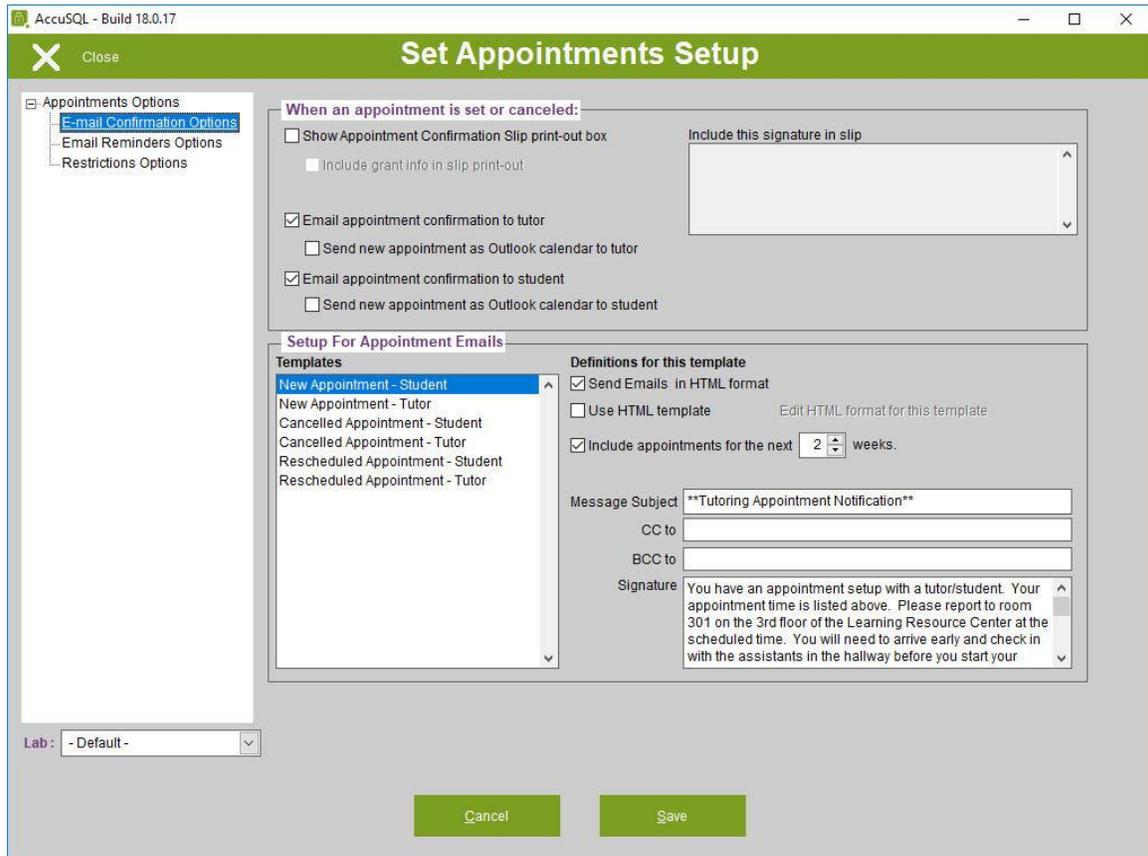
Add a short note to appointment made: Check this box if you want to add a note to a specific appointment. Notes are entered near the end of the appointment scheduling process by admins and students and are included in the email confirmations sent to students and/or tutors.

Auto select days in appt. wiz: If this box is checked, when users access the Appointment Wizard the day selection panel will appear with the days automatically selected. If you do not select this box the days will not be selected, then student will pick the days they want from the list. **Tip:** If the Appoint Wizard is behaving sluggishly, you may want to uncheck this box.

Use Appointment Wizard instead of Quick Scheduler for student’s appointments: If checked, students will be presented with the Appointment Wizard when they click the Appointments button from the main sign in screen and then schedule an appointment. If unchecked, then the students will use the Quick Scheduler to create the appointments.

EMAIL CONFIRMATIONS SETUP OPTIONS

To access the Email Confirmations Setup options, click Set Appointments in System Administration, then the Setup tab in the bottom right of the screen. Now click on Email Confirmation Options on the left side of the Options menu to select it.



Show Appointment Confirmation Slip print-out box: Check this box if you want to print out an appointment confirmation slip after scheduling an appointment. The Appointment Confirmation will

automatically print all the appointment information, but if you want you can customize it by adding your own text in the text area that will appear in the print-out. Also, if you choose, you can include any grant information in the print-out slip.

Email appointment confirmation to tutor: Check this box if you want to email an appointment confirmation message to the tutor when an appointment is scheduled or canceled. If you check this box, you can also check the box under it to send the new appointment via Outlook calendar to the tutor.

Email appointment confirmation to student: Check this box if you want to email an appointment confirmation message to the student when an appointment is scheduled or canceled. If you check this box, you can also check the box under it to send the new appointment via Outlook calendar to the student.

Templates (Setup for Appointment Email area):

Use this area to set up your appointment e-mails. You may send a new appointment confirmation, a cancelled appointment confirmation, or a rescheduled appointment confirmation to students and/or tutors. Check the “Send Emails in HTML format” to send an email using HTML. If this box is not checked, emails will be sent in plain-text format.

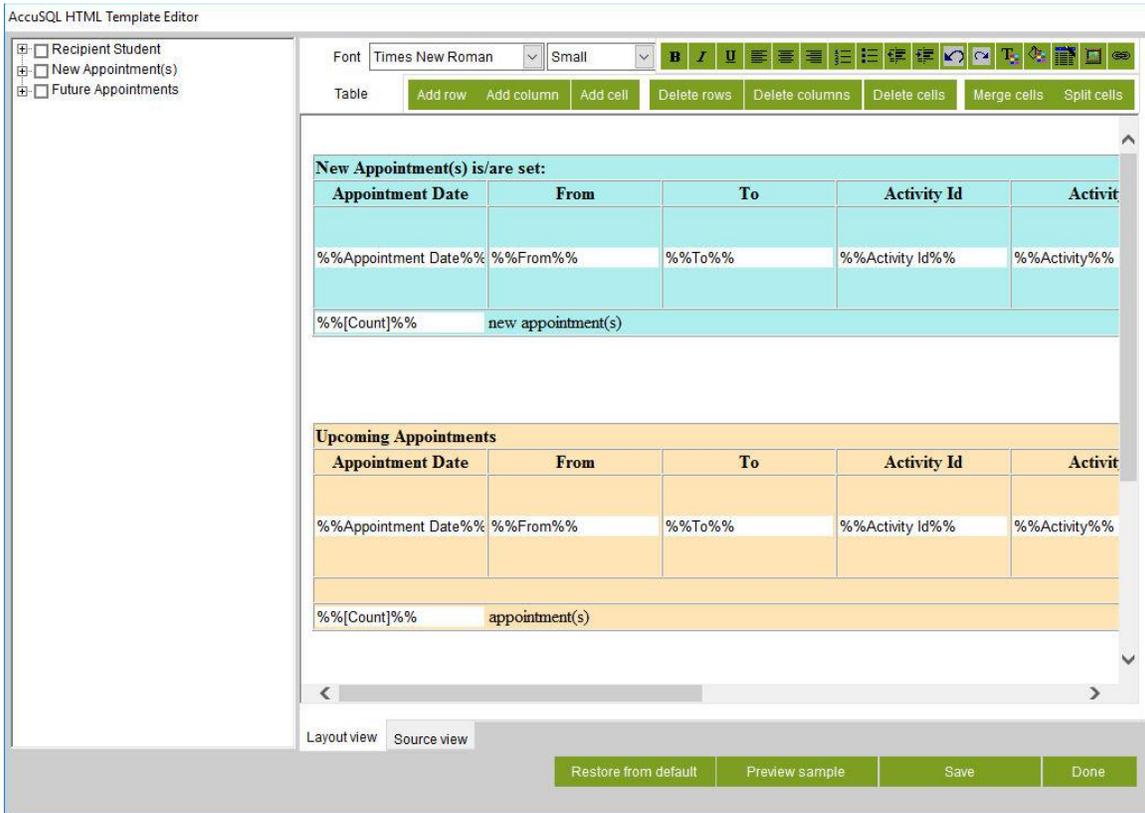
Use the CC to and BCC to boxes to enter an email address if you would like a carbon copy or blind carbon copy of the confirmation and cancellation email messages.

If you do not select the Use HTML template checkbox, then you can enter your email text directly in the Signature text area. **Important:** The text in the area is placeholder text and should be replaced with your own message. The appointment information will automatically appear in the emails, but the signature area is where you can add the text that will appear below the appoint details generated by AccuSQL/AccuTrack.

After you have customized the message for your New Appointment – Student template, you can then click on New Appointment – Student and then use your down arrow key on the keyboard to select the next template, for example New Appointment – Tutor. After modifying that template, you would then down

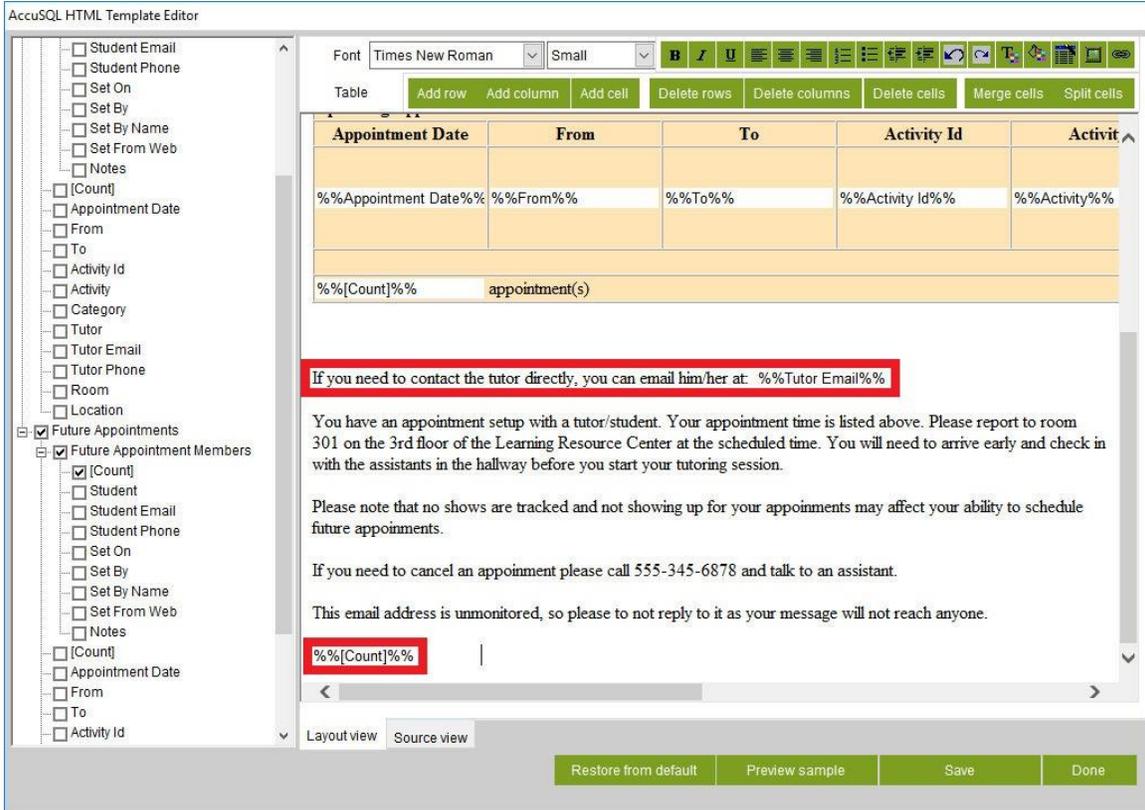
arrow to the Cancelled Appointment – Student template and modify that, arrow down to the Cancelled Appointment – Tutor template, etc. until you have all of the templates the way you want them.

If you choose to use HTML templates, you can check that box, and then click the Edit HTML format for this template button, you will be able to edit the templates in HTML.



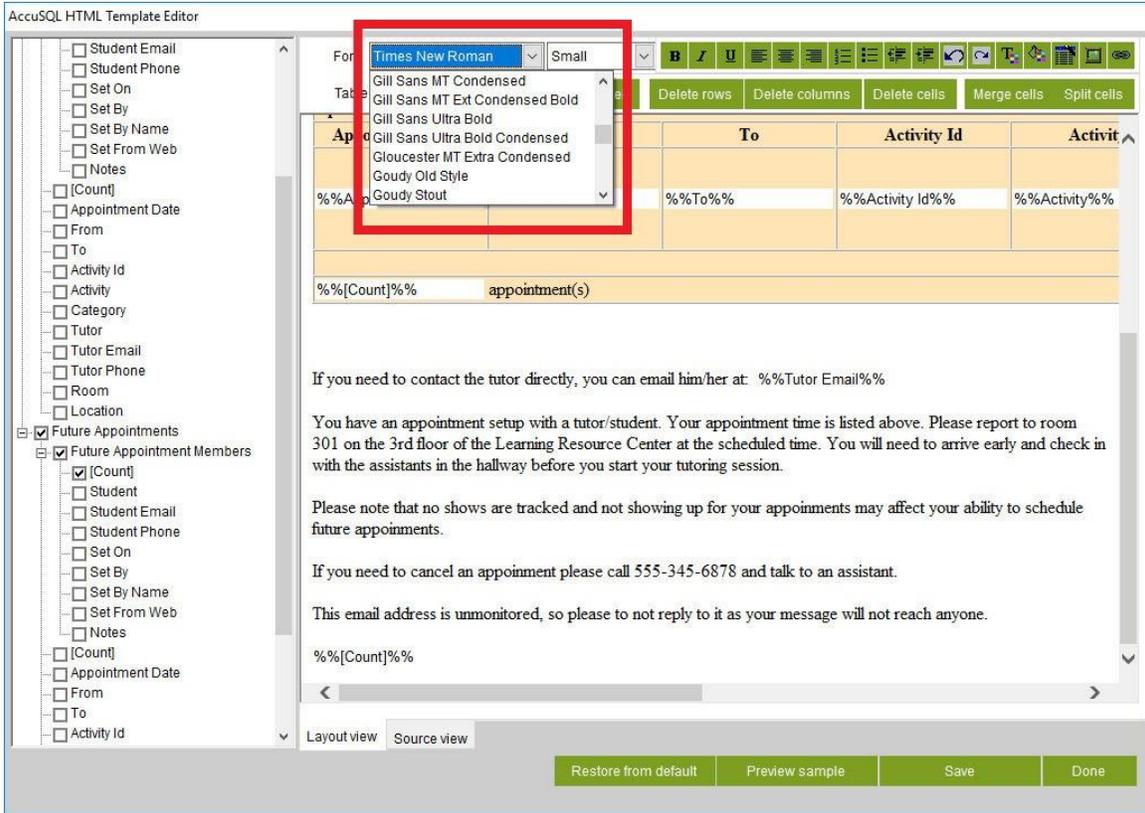
The fields enclosed with %% characters are merge fields. That means they will merge the data from the appointment details, student, and tutor into the email when it is sent. At the bottom of the template, you should change the “canned” text for the email to reflect your own information.

On the left of the screen are various other merge fields you can add to the template. To do so, click the + sign to expand the desired tree element, and then click the checkbox next the merge field you want to add to select it. Now click on the merge field and hold the left mouse and then drag it where you want it to appear in the template. In the following example next was added to indicate how the student can email the tutor and the Tutor Email merge field was added to the template:

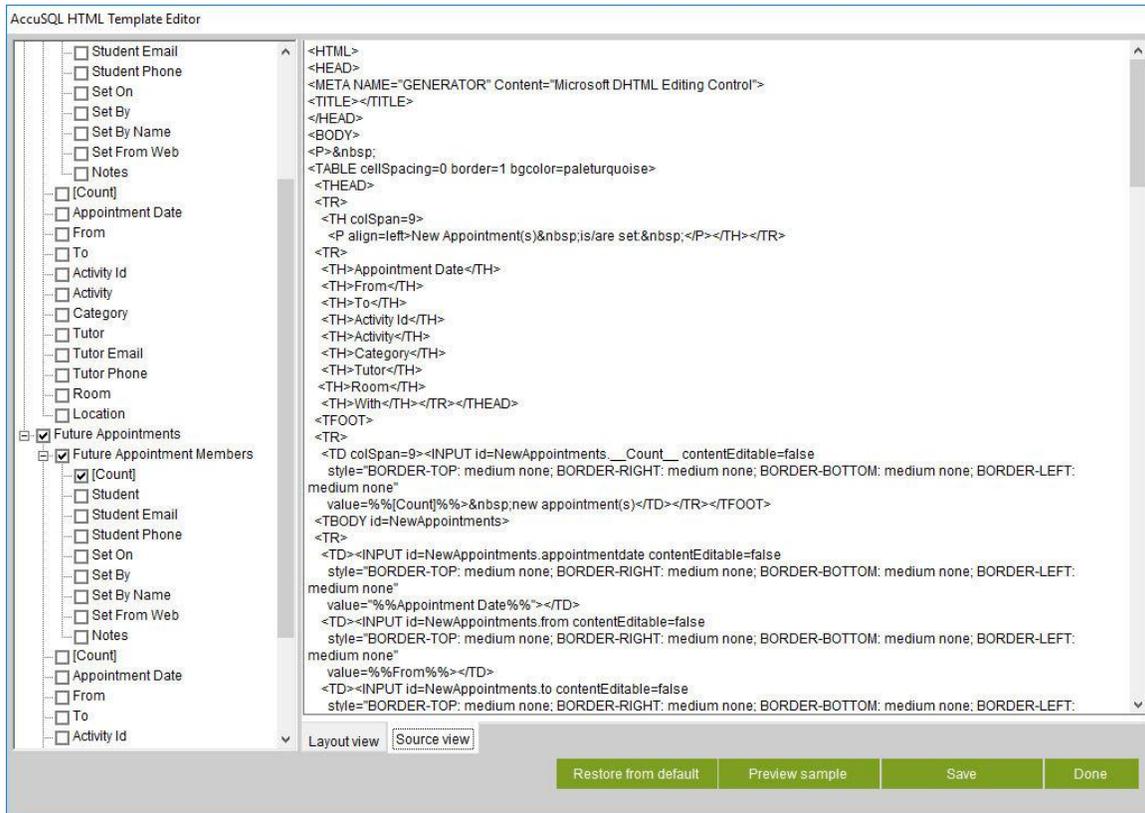


After you are done editing the template, click the Save button to keep your changes. If you want to set the template back to its default settings, you can click the Restore from default button.

Tip: If you want to change the font for the entire template click Ctrl and the a on the keyboard to select all, then click the drop-down font selector at the top of the editor and pick the new font.



Source view: If you click the Source View tab you can view the html for the template and edit it directly.



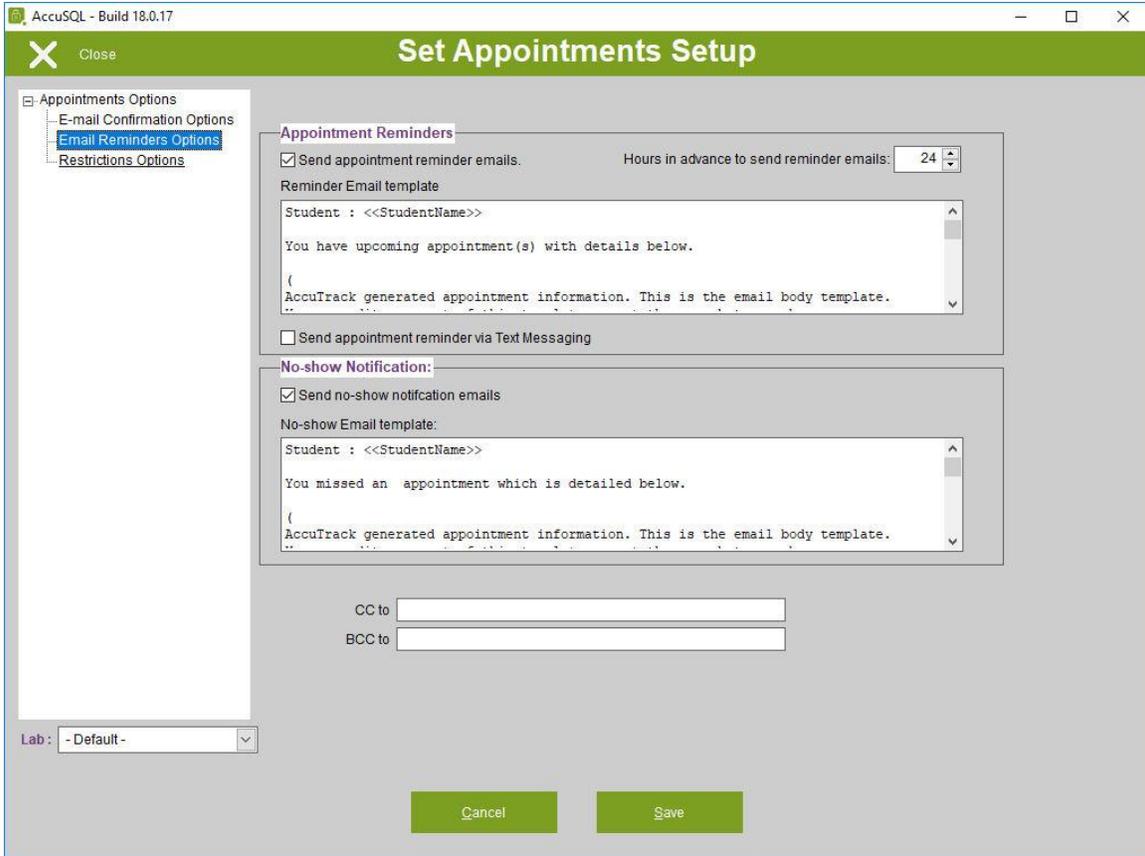
The DHTML is strictly interpreted here, so be careful or you make “break” the template and then have to Restore from default to fix it and start over. It is a good idea to do Ctrl a on the keyboard to select all the source code and then paste it into Notepad as you make changes so you do not lose what you have done.

 **Important:** If you see a message that indicates a component is missing when you click the Edit HTML format for this template using this button, you do not have the Microsoft DHTML Editing Component installed on your computer. You can download that [here](#). Unzip the file and then run the DhtmlEd.msi file to install it.

 **Warning:** If you choose to edit the source view, then you must Save in that view directly and not go back to Layout view, else you will lose your changes!

EMAIL REMINDERS SETUP OPTIONS

To access the Email Reminders Setup options, click Set Appointments in System Administration, then the Setup tab in the bottom right of the screen. Now click on Email Reminders Options on the left side of the Options menu to select it.



AccuSQL/AccuTrack has a special utility that can automatically send email reminders to students. Use this page to set up this utility. The top half is for controlling the appointment reminder emails, while the bottom half is for controlling the no-show notification emails.

APPOINTMENTS REMINDERS

You can setup AccuSQL/AccuTrack to automatically send an email message to students to remind them of their upcoming appointments.

To setup this feature, make sure that the "Send appointment reminder emails" checkbox is checked and enter the number of hours in advance to send reminder emails:

You can also change the email template of the text of the email reminder message. You can type in any text you like. For variables that depend on the appointment, use the following (do not leave blank spaces between opening and closing angle brackets):

<<StudentName>>: This will be replaced by the student's name.

<<AppointmentInfoList>>: This will be replaced by the appointment's date, from date-time, to date-time, class and tutor.

<<DateTimeGenerated>>: This will be replaced by date and time appointment message is generated.

You also have the option of send the appointment reminders via text messaging by clicking the Send appointment reminder via Text Messaging checkbox. For text messaging, you will need to setup the Nexmo messaging service in the System Administration Communications >>Setup >> Text Messaging Configuration screen. You also need to have a cell phone number entered for your students and tutors.

NO-SHOW NOTIFICATIONS

You can setup AccuSQL/AccuTrack to automatically email a message to students who miss their appointments. To setup this feature, make sure that the "Send no-show notification emails" checkbox is checked.

To change the text of the no-show message, use the message template. See above for a detailed explanation on using the template.

 **Important:** In AccuSQL/AccuTrack 2014 and later, the appointment reminders and no-show notifications are sent by a utility called AccuTaskRunner. This utility is installed as a Windows Service, typically on the server. For detailed information about installing and configuring the AccuTaskRunner service, consult the [Installing AccuTaskRunner](#) document.

You can schedule the frequency of the emails via an option in the System >> Setup >> System Options >> Scheduled Tasks screen.

RESTRICTIONS OPTIONS

To access the Restrictions Options, click Set Appointments in System Administration, then the Setup tab in the bottom right of the screen. Now click on Restrictions Options on the left side of the Options menu to select it. This page allows you to configure restrictions on appointments:

Only allow students to schedule appointments with tutors assigned to them in the Tutoring Requests screen: Check this option if you would like to allow scheduling appointments only to students who have tutoring request assignments. Use this option if you are using the Tutoring Requests and Assignment function of AccuSQL/AccuTrack, else leave this unchecked.

Only allow registered students to schedule appointments: Check this option if you want to restrict appointments only to students registered in the class. With this option selected, students not registered in a class will not be allowed to schedule appointments for that class.

Freeze new appointments if no shows exceed X: With this option you can freeze future appointments when a maximum number of no-shows is reached. The number of no-shows is counted from the beginning of the semester. You can set the maximum no-shows here by typing the number in the box.

Note: You can over-write this restriction and void excused no-shows in the View Appointments >> View No-Shows screen.

Freeze new appointments if cancellations exceed X: You can set up AccuSQL/AccuTrack to freeze future appointments when a certain number of cancellations is reached. The number of cancellations is counted from the beginning of the semester. You can set the maximum cancellations here by typing the number in the box. **Note:** You can over-write this restriction and void excused cancellations in the View Appointments >> View Cancellations screen.

Maximum number of appointments per day: Use this box to set the maximum number of appointments allowed per day per student.

Maximum number of appointments per week: Use this box to set the maximum number of appointments per week per student.

VIEW APPOINTMENTS SCREEN

When you click on View Appointments from the Main Menu, you will see the following options:

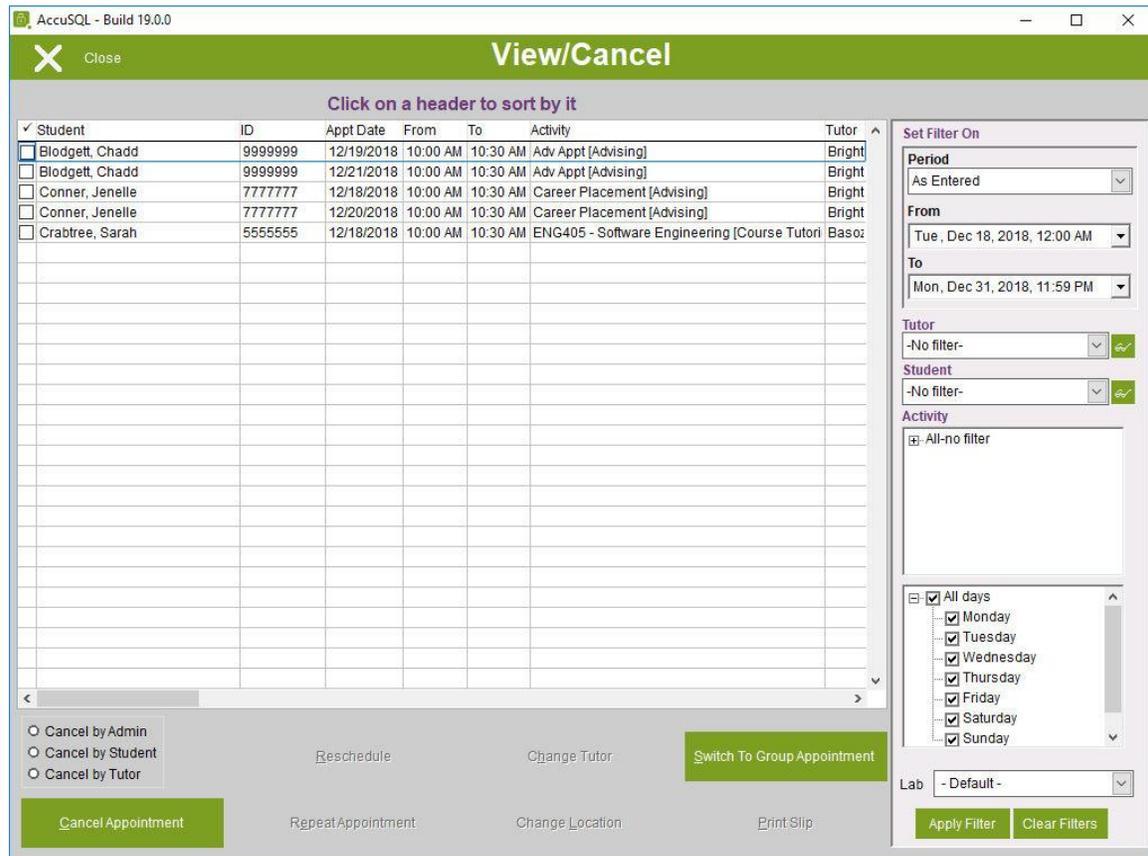
- View/Cancel: Use to find, view, and modify appointments and also to cancel them.
- Daily Viewer (detailed): Use to view tutor's daily appointment schedules.
- Daily Viewer (summary): Use to view tutor's daily appointment schedules.
- Weekly Viewer: View tutors' weekly schedules.
- Monthly Viewer: Launches a monthly appointment viewer.
- Appointments Quick Daily View: Launches a daily appointment viewer.
- Appointment Notes: View notes entered when appointments were scheduled
- View Cancellations: Use to view and void cancelled appointments
- View No-Shows: Use to view and void appointment no-shows, or to convert no-shows to cancellations.

The following sections have more information on the above screens.

VIEW/CANCEL

Purpose: To view, cancel, repeat, reschedule, etc. appointments.

Access: From System Administration, click on View Appointments>>View/Cancel.



The appointments are displayed in a *SuperTable*, which means you can sort the records by any column by clicking on its header.

To find appointments, you have several filter options available on the right side of the View/Cancel screen. You can use one or a combination of several filters to find the appointments you are looking for. Here are the available filters:

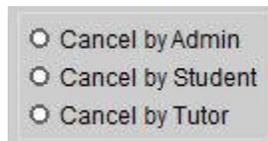
- **Period:** Click to filter your view to a specific period of time.
- **From and To:** If you prefer, you can enter and specific date and time range to filter your view.
- **Tutor:** From the drop-down you can filter on a specific tutor. If you click the eyeglasses icon next to this field, you can search for a specific tutor record.
- **Student:** From the drop-down you can filter on a specific student. If you click the eyeglasses icon next to this field, you can search for a specific student record.

- **Activity:** Click the + sign to expand the view and you will see a list of your categories. Click the + sign under the category to show the particular activities that are associated with it. Now click and activity to select it.
- **Days:** Click the checkboxes on the days of the week you would like to filter on. By default All Days are selected.
- **Labs:** Select the dropdown menu and select the Lab you which to filter on. If default is selected, you will see appointments across all Labs.

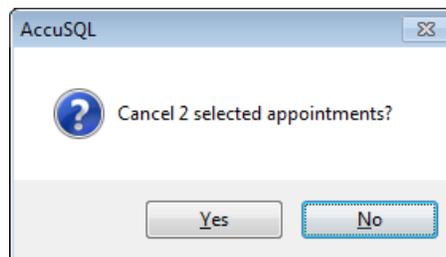
After you have set your filters as desired, click the Apply Filter to filter the results in the display grid. If you want to reset back to the default, click the Clear Filters button.

CANCEL APPOINTMENT

The View Appointments screen allows you to cancel one or more appointments. To cancel appointment(s), first select the appointment(s) by clicking on the check box(es) in the top grid, and then select one of the radio buttons in the bottom left of the screen to determine who is cancelling the appointment(s).



Now click on the “Cancel Appointment” button. AccuSQL/AccuTrack will display a confirmation message:



If you click on “Yes” the appointment(s) will be canceled. When you generate a report, the canceled appointment will appear with strikethrough text.

Note: If the appointment was canceled by the student, make sure that the “Cancel by Student” option is selected. If the appointment was canceled by the tutor or by an AccuSQL/AccuTrack administrator, make sure that the one of those options is selected. If one of the latter two is selected, the cancellation will not count against the student.

Note: Depending on the setting in the Options screen, AccuSQL/AccuTrack may send an E-mail message to both the student and tutor when an appointment is canceled.

RESCHEDULE

Clicking the “Reschedule” button will transport users to the Appointment Wizard. From this screen, the appointment time and date can be changed.

REPEAT APPOINTMENT

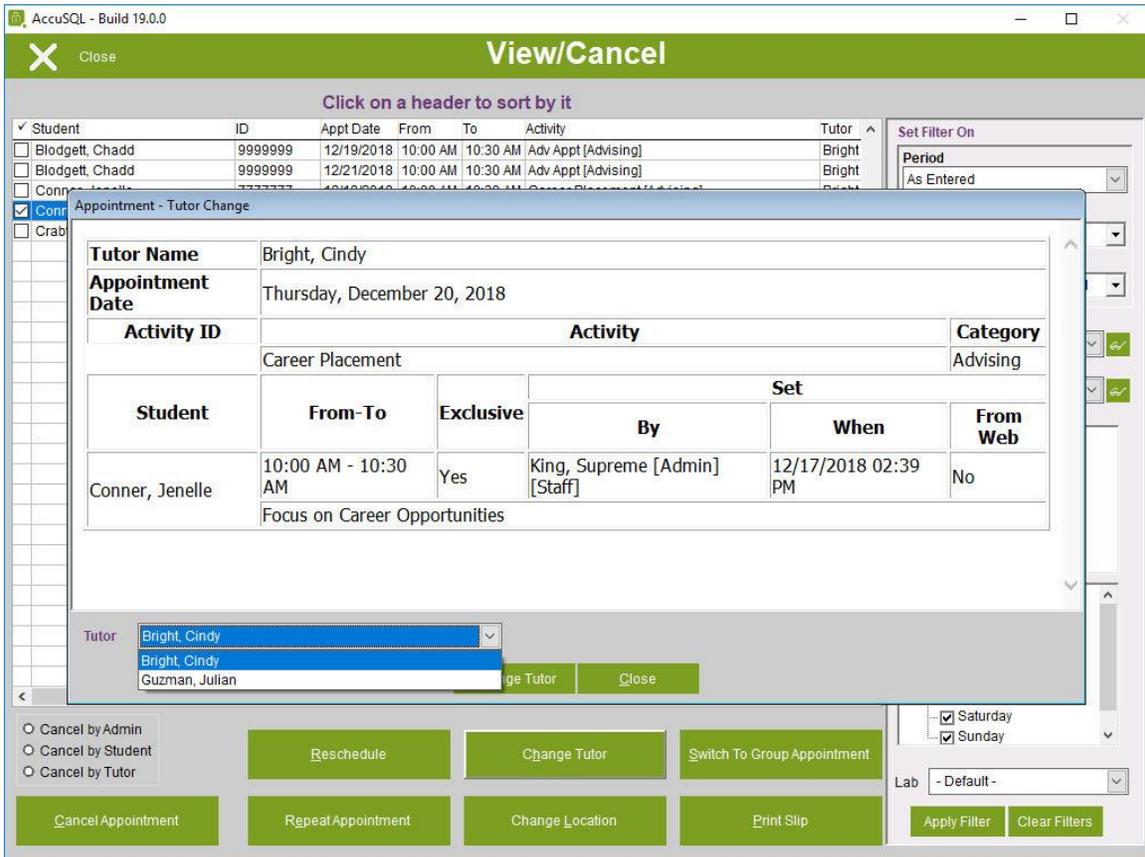
Users can easily create repeat appointments from existing sessions in the View/Cancel screen. Simply select which appointment you’d like to repeat from the SuperTable and click on the “Repeat Appointment” button. A separate screen will appear showing the existing appointment’s information, as well as a calendar drop-down box from which you can select which day to repeat the appointment.

The screenshot shows the 'View/Cancel' interface in AccuSQL. A table lists appointments with columns: Student, ID, Appt Date, From, To, Activity, and Tutor. A 'Scheduling Appointment' dialog is open, showing details for an appointment with Tutor Name 'Bright, Cindy', Appointment Date 'Thursday, December 20, 2018', Activity ID 'Career Placement', and Category 'Advising'. The dialog also displays a table for the appointment's schedule, including Student 'Conner, Jenelle', From-To '10:00 AM - 10:30 AM', Exclusive 'Yes', By 'King, Supreme [Admin] [Staff]', When '12/17/2018 02:39 PM', and From Web 'No'. At the bottom of the dialog, there is a dropdown for 'Appointment date to repeat on' set to 'Wed, Dec 19, 2018'. The main window has several buttons at the bottom: 'Cancel Appointment', 'Reschedule', 'Repeat Appointment', 'Change Tutor', 'Change Location', 'Switch To Group Appointment', 'Print Slip', 'Apply Filter', and 'Clear Filters'.

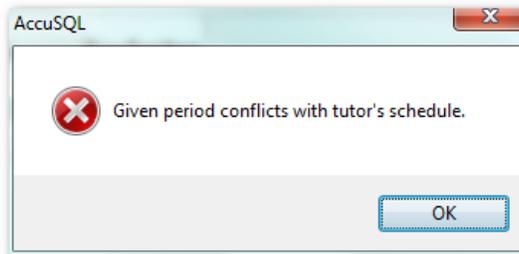
After you have selected the repeat date from the drop-down box, click Set Appointment. The appointment will be scheduled exactly like the one you selected to repeat, but with the new date.

CHANGE TUTOR

You can change the tutor for an existing appointment from the View/Cancel Screen. Simply click the appointment you want to change the tutor for and click the “Change Tutor” button and a new screen will appear with the existing appointment’s information.

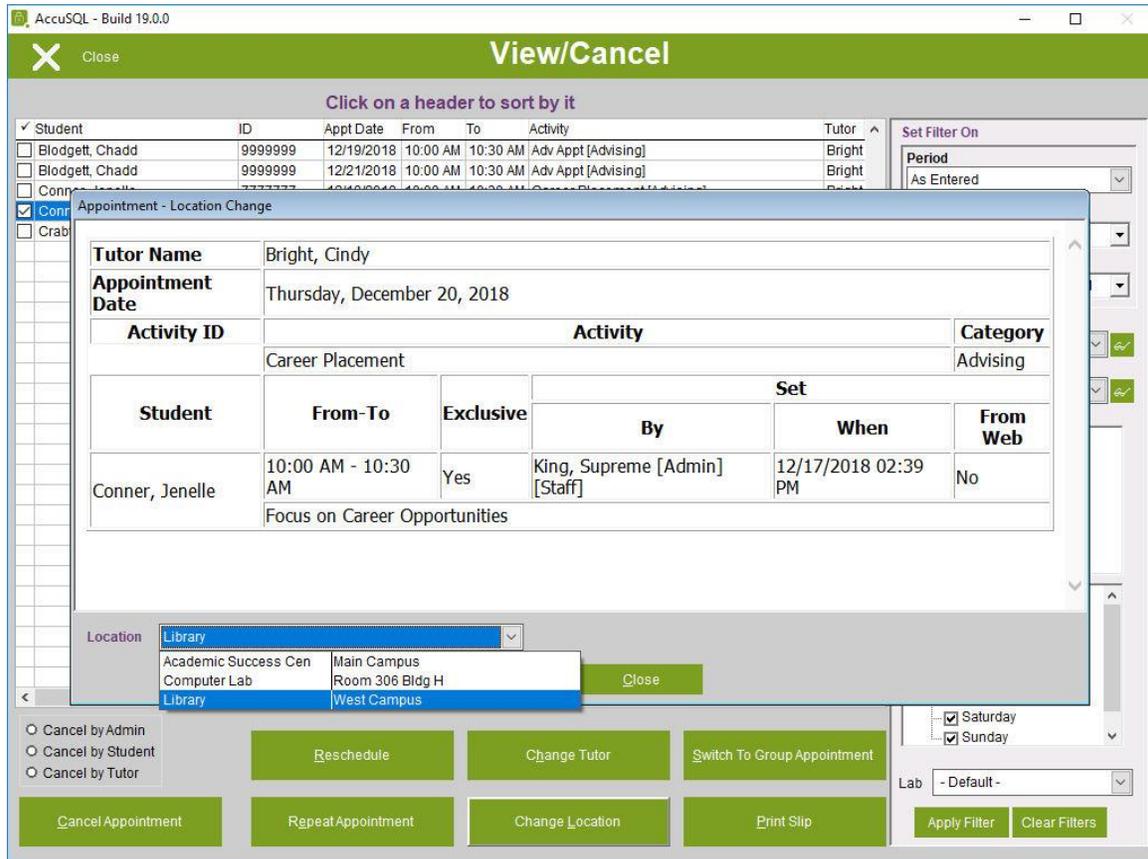


You can then choose a new tutor from the drop-down box and click the Change Tutor button. If the attempted change conflicts with the requested tutor’s existing schedule, this pop-up will appear:



CHANGE LOCATION

You can modify the location of an existing appointment by clicking the appropriate button on the View/Cancel Appointment screen and selecting a new location from the drop-down box and then clicking the Change Location button.



Note: The locations available for the appointments are setup in the System >> Rooms screen.

 **Tip:** The View/Cancel Appointment screen also allows users to reprint appointment confirmation slips. Just click on the “Print Slip” button and select the appropriate slip to print.

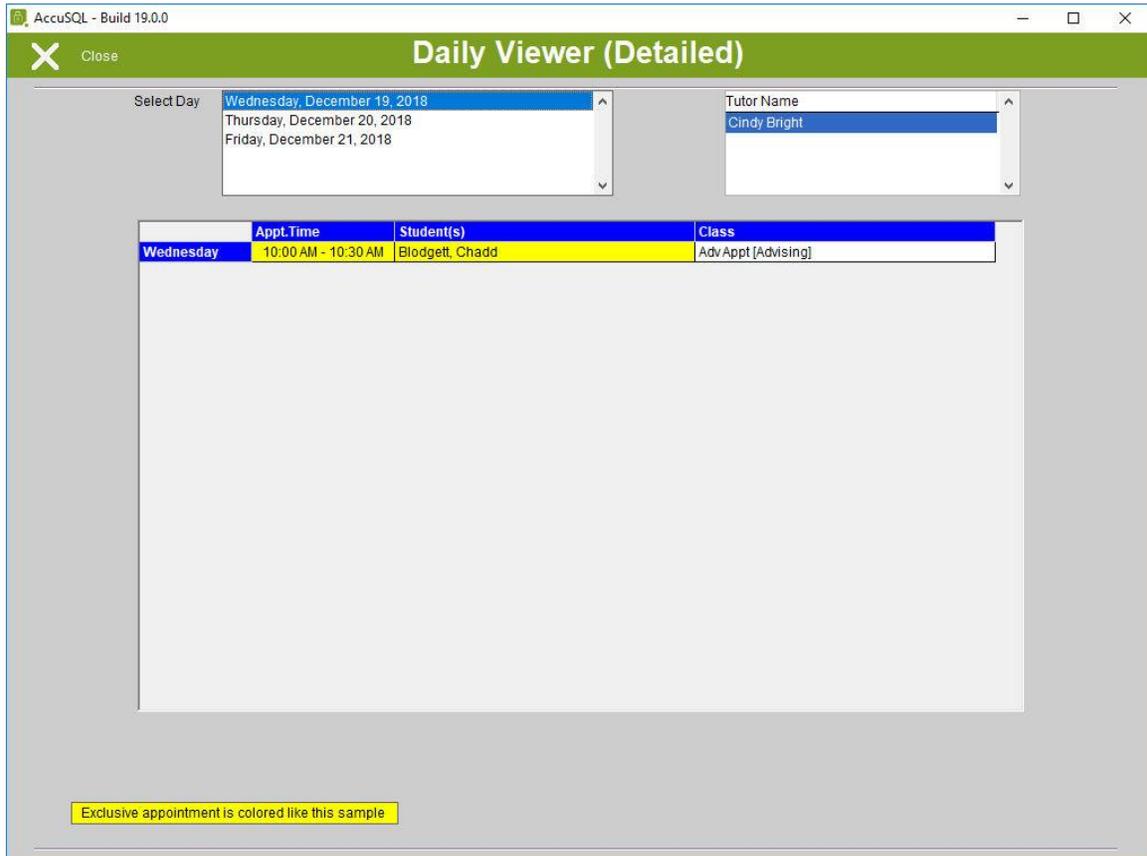
Switch to Group or Exclusive Appointment

You can switch a group appointment to an exclusive one, or vice-versa by selecting the appointment in the grid then clicking the Switch to Group Appointment or Switch to Exclusive Appointment button. The button will change depending on the current status of the appointment. Note: You will need to click Apply Filter to update the changes in the grid. You will notice that the Exclusive column in the grid will change to either Exclusive Yes or No, depending on what you changed it to.

DAILY VIEWER (DETAILED) SCREEN

Purpose: To view daily appointments per tutor.

Access: From System Administration, click on View Appointments >>Daily Viewer (detailed).

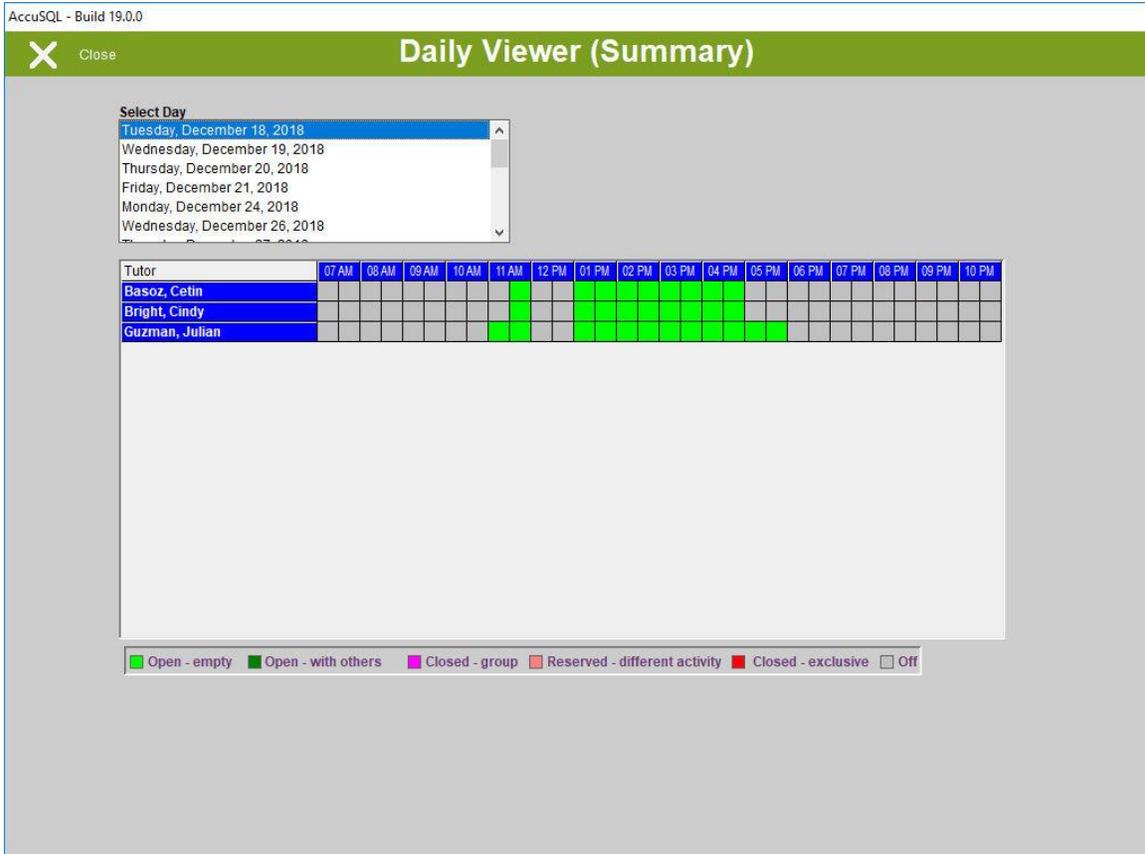


Start by selecting the day you want to view by clicking on it. AccuSQL/AccuTrack will display a list of tutors and will show their appointments for the selected day. Exclusive appointments are highlighted in yellow and group appointments are not highlighted at all.

DAILY VIEWER (SUMMARY) SCREEN

Purpose: To view daily appointments per tutor in a condensed view.

Access: From System Administration, click on View Appointments >>Daily Viewer (summary).

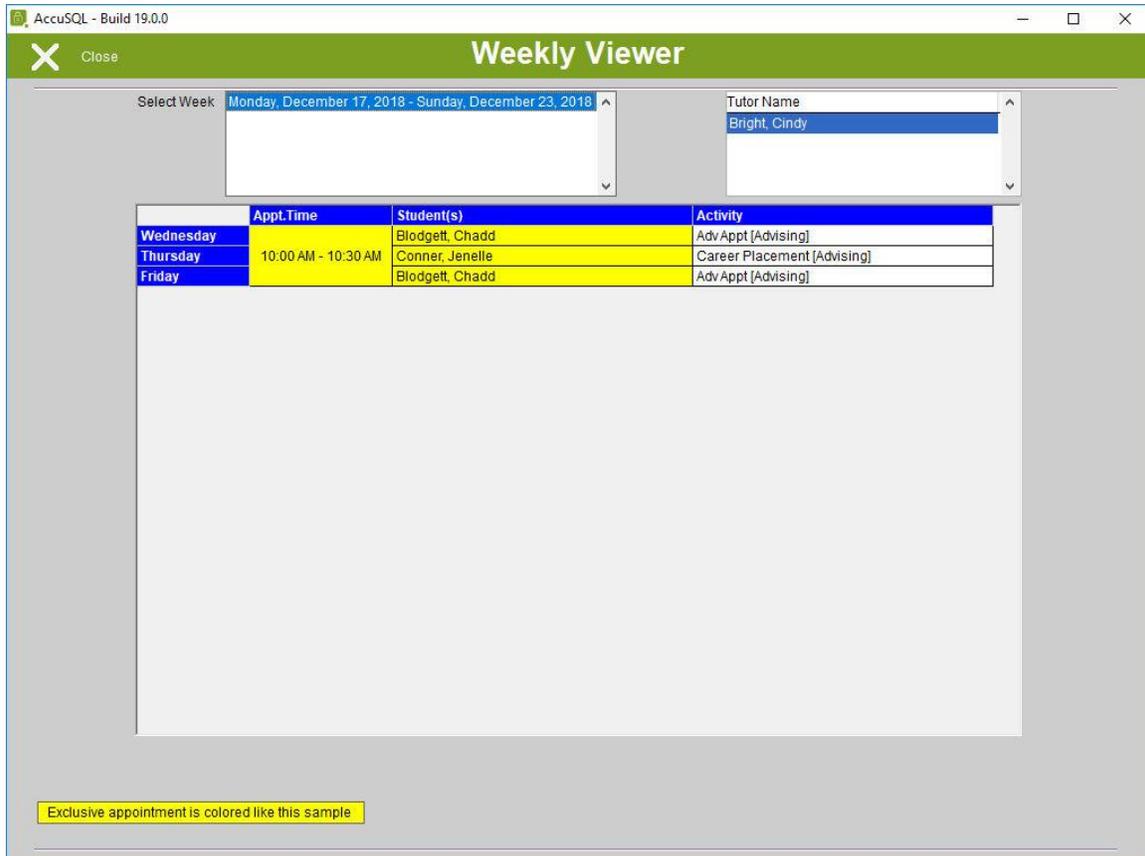


Select a day to view the appointments for all tutors on that day. If you mouse over a colored block, indicating an appointment is scheduled for that tutor for the time indicated, a box will appear in the screen showing the details for that appointment.

WEEKLY VIEWER

Purpose: To view tutors' weekly schedules.

Access: From System Administration, click on View Appointments>>Weekly Viewer.



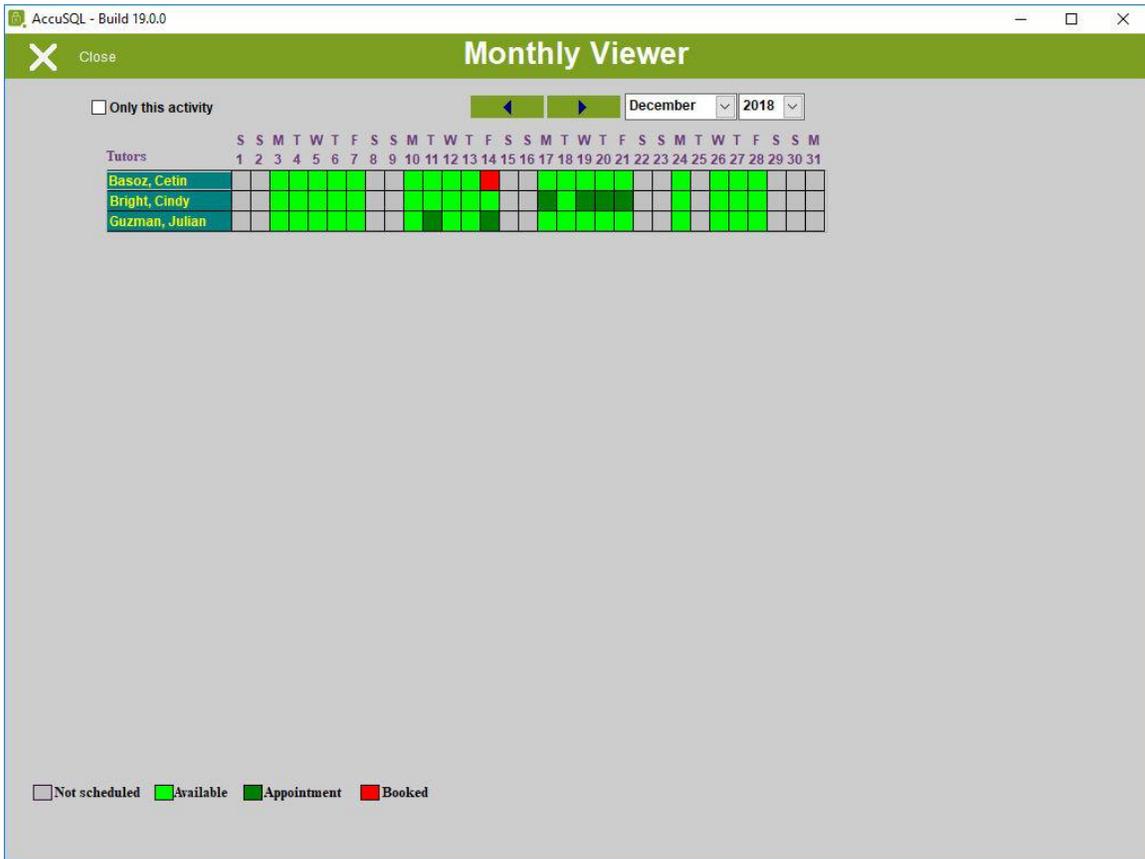
To view the schedule of a certain week, select the week from the list. Next select the tutor's name. AccuSQL/AccuTrack will display the appointments for the selected tutor during the selected week.

MONTHLY VIEWER

Purpose: To view tutors' monthly and daily schedules.

Access: From System Administration, click on View Appointments >> Monthly Viewer.

The Monthly Viewer screen shows a chart of appointments and schedules for all your active tutors. This chart is helpful in identifying open appointments slots and in gauging how busy your center is with appointments.



READING THE CHART

As you can see from the screenshot above, the viewer lists the active tutors in the left column. The list is sorted alphabetically by last name. For each tutor, you will see a row of blocks. Each block represents a day of the month. The days are displayed on top of the first row.

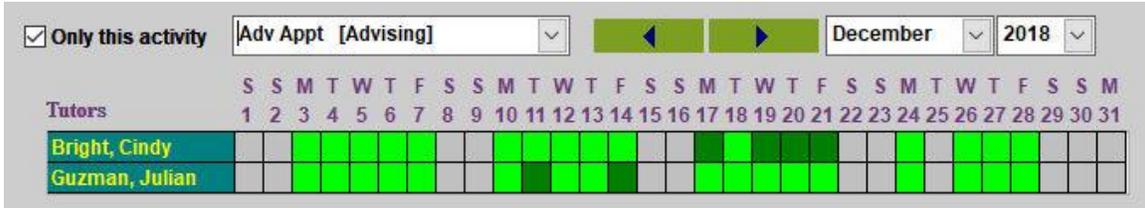
The color of each block depends on the appointment's status as follows:

- Gray block: Tutor is not scheduled to work on this day.
- Light green: Tutor is scheduled to work and does not have any appointments on this day.

 Dark green: Tutor is scheduled to work and has one or more appointments on this day.

 Red: Tutor is scheduled to work, but is completely booked on this day.

 **Tip:** You can restrict the displayed tutors in the Monthly Viewer to the tutors of a certain activity. To do this, click on the “Only this activity” check box at the top.



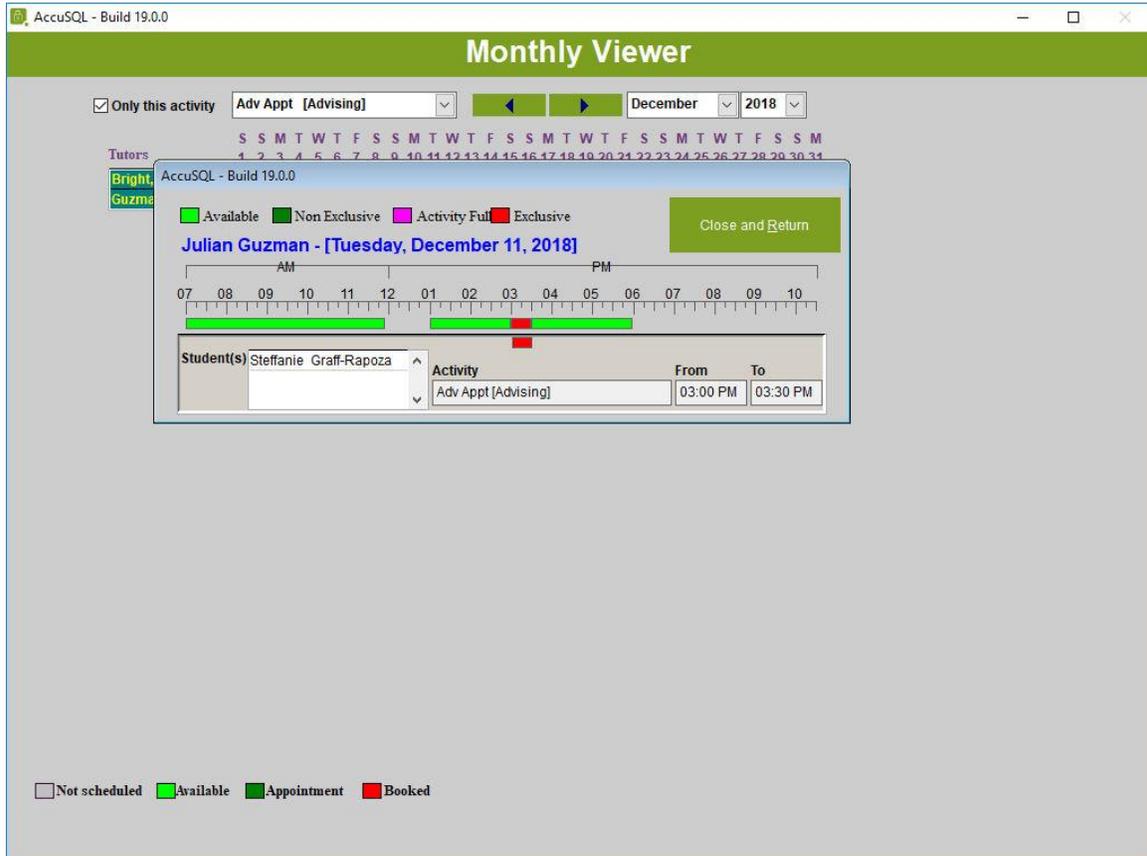
The screenshot shows a monthly viewer interface for December 2018. At the top, there is a check box labeled "Only this activity" which is checked. Next to it is a dropdown menu showing "Adv Appt [Advising]". To the right are navigation buttons (left and right arrows) and dropdown menus for the month "December" and the year "2018". Below this is a calendar grid with days of the week (S, S, M, T, W, T, F, S, S, M, T, W, T, F, S, S, M, T, W, T, F, S, S, M) and days of the month (1-31). Two rows of tutors are shown: "Bright, Cindy" and "Guzman, Julian". Bright, Cindy has dark green blocks on days 1, 2, 3, 4, 5, 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, and 31. Guzman, Julian has dark green blocks on days 1, 2, 3, 4, 5, 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, and 31.

To display all tutors again, simply uncheck the check box.

To see the schedules and appointments of a different month, you can use the next and previous month navigation buttons at the top or the month and year drop-down list boxes.

ZOOMING IN ON A DAY

To get a detailed view of a certain day of the month, simply click on its block in the Monthly Viewer. This will bring up a daily view of the appointments:



The title bar of the window shows the name of the selected tutor and the date being viewed. Use the **“Close and Return”** button at the top right corner to go back to the Monthly Viewer.

Under the tutor’s name, you will see a time ruler showing the hours of the day from 7AM to 10:30 PM. Under this ruler you will see a bar representing the schedule of the selected tutor during the corresponding hours.

The **color of the bar** depends on the schedule status:

Example	Color	Meaning
	Bright Green	Tutor is available and has no appointments during this time.
	Dark	A one-to-many appointment is scheduled. The time slot is still open for

	Green	more students.
	Pink	A one-to-many appointment is scheduled. However, the maximum number of students per tutor has been reached, and the slot is not available for new appointments.
	Red	An exclusive appointment is set. No other appointments can be made in this time slot.

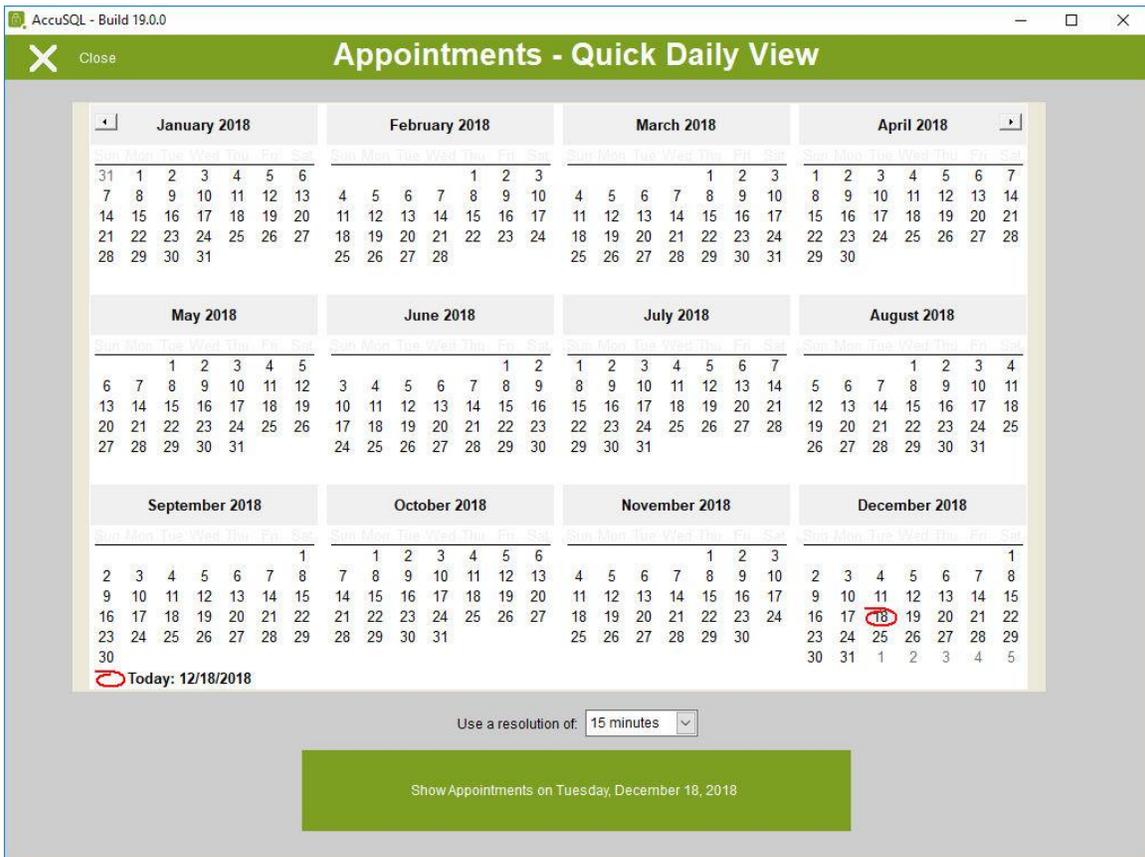
Each appointment is shown in a separate **appointment box**. The appointment box has a list box with the name(s) of student(s) scheduled for the appointment. The box also shows the activity (class) name, the start time, and end time of the appointment.

APPOINTMENTS QUICK DAILY VIEW

Purpose: View tutor schedules for a specific date.

Access: From System Administration, click on View Appointments>>Appointment Quick Daily View.

The Appointments Quick Daily Viewer screen allows you to select a specific date from an annual calendar view.



Once you have chosen the date that you would like to examine, click the button at the bottom of the screen and a new window will open showing the schedules of all tutors for that day. This schedule follows the previously mentioned AccuSQL/AccuTrack color coding.

	Basoz, Cetin	Bright, Cindy	Guzman, Julian
07:00 AM			
07:15 AM			
07:30 AM			
07:45 AM			
08:00 AM			
08:15 AM			
08:30 AM			
08:45 AM			
09:00 AM			
09:15 AM			
09:30 AM	Meeting with the Dean		
09:45 AM			
10:00 AM		10:00 AM - 10:30 AM Adv Appt	
10:15 AM			
10:30 AM			
10:45 AM			
11:00 AM			
11:15 AM			
11:30 AM			
11:45 AM			
12:00 PM			
12:15 PM			
12:30 PM			
12:45 PM			
01:00 PM			
01:15 PM			
01:30 PM			
01:45 PM			
02:00 PM			
02:15 PM			
02:30 PM			
02:45 PM			

APPOINTMENT NOTES

Purpose: View notes entered for any scheduled appointments.

Access: From System Administration, click on View Appointments>>Appointment Notes.

Tutor Name	Activity	Student	Date	Start	End
Basoz, Cetin	ICP305 - Intro C++ Programming [Course Tutorin	Blodgett, Chadd	09/11/2018	08:00 AM	08:30 AM
Bright, Cindy	Adv Appt [Advising]	Blodgett, Chadd	12/19/2018	10:00 AM	10:30 AM
Bright, Cindy	Adv Appt [Advising]	Blodgett, Chadd	12/21/2018	10:00 AM	10:30 AM
Basoz, Cetin	JP4400 - Java Programming [Course Tutoring]	Conner, Jenelle	10/08/2018	03:30 PM	04:00 PM
Bright, Cindy	Career Placement [Advising]	Conner, Jenelle	12/18/2018	10:00 AM	10:30 AM
Bright, Cindy	Career Placement [Advising]	Conner, Jenelle	12/20/2018	10:00 AM	10:30 AM
Basoz, Cetin	ENG405 - Software Engineering [Course Tutoring]	Crabtree, Sarah	12/18/2018	10:00 AM	10:30 AM
Basoz, Cetin	ENG405 - Software Engineering [Course Tutoring]	Graff-Rapoza, Steffanie	10/08/2018	04:00 PM	04:30 PM
Basoz, Cetin	ENG405 - Software Engineering [Course Tutoring]	Graff-Rapoza, Steffanie	10/30/2018	11:00 AM	11:30 AM
Basoz, Cetin	ENG405 - Software Engineering [Course Tutoring]	Graff-Rapoza, Steffanie	11/12/2018	11:30 AM	12:00 PM
Basoz, Cetin	ENG405 - Software Engineering [Course Tutoring]	Graff-Rapoza, Steffanie	12/14/2018	02:30 PM	03:00 PM
Basoz, Cetin	ICP305 - Intro C++ Programming [Course Tutorin	Graff-Rapoza, Steffanie	09/11/2018	08:00 AM	08:30 AM
Bright, Cindy	Adv Appt [Advising]	Graff-Rapoza, Steffanie	12/17/2018	10:00 AM	10:30 AM
Guzman, Julian	ALG301 - Algebra 1 [Math Tutoring]	Graff-Rapoza, Steffanie	09/14/2018	01:30 PM	02:00 PM
Guzman, Julian	ALG301 - Algebra 1 [Math Tutoring]	Graff-Rapoza, Steffanie	09/14/2018	01:30 PM	02:00 PM
Guzman, Julian	ALG301 - Algebra 1 [Math Tutoring]	Graff-Rapoza, Steffanie	09/14/2018	01:30 PM	02:00 PM
Guzman, Julian	ALG301 - Algebra 1 [Math Tutoring]	Graff-Rapoza, Steffanie	09/18/2018	01:00 PM	01:30 PM
Guzman, Julian	ALG301 - Algebra 1 [Math Tutoring]	Graff-Rapoza, Steffanie	09/20/2018	01:00 PM	01:30 PM
Guzman, Julian	ALG301 - Algebra 1 [Math Tutoring]	Graff-Rapoza, Steffanie	09/26/2018	03:00 PM	03:30 PM
Guzman, Julian	Adv Appt [Advising]	Graff-Rapoza, Steffanie	12/11/2018	03:00 PM	03:30 PM
Guzman, Julian	Adv Appt [Advising]	Graff-Rapoza, Steffanie	12/14/2018	04:00 PM	04:30 PM
Guzman, Julian	ENG405 - Software Engineering [Course Tutoring]	Graff-Rapoza, Steffanie	10/16/2018	03:00 PM	03:30 PM
Guzman, Julian	ENG405 - Software Engineering [Course Tutoring]	Graff-Rapoza, Steffanie	11/27/2018	08:00 AM	09:00 AM
Guzman, Julian	New Student [Advising]	Graff-Rapoza, Steffanie	11/26/2018	11:20 AM	12:20 PM
Guzman, Julian	JP4400 - Java Programming [Course Tutoring]	Rodriguez, Santiago	11/27/2018	08:00 AM	09:00 AM
Guzman, Julian	CAL401 - Calculus [Math Tutoring]	Thongpaen, Tawan	09/13/2018	09:30 AM	10:00 AM
Guzman, Julian	CAL401 - Calculus [Math Tutoring]	Thongpaen, Tawan	09/14/2018	01:00 PM	01:30 PM

As with the View/Cancel screen, you can apply any filters or combination of filters to find specific appointments based on dates, tutors, students, activities, etc. You can also click the Only show appointments with notes checkbox and then click Apply Filter to see only the appointments where notes were entered during the appointment scheduling process.

Tip: You can enable notes to be added to appointments when they are scheduled in the View Appointments >> Setup >> Appointments Options screen by selecting the Add a short note to appointment made checkbox.

VIEW CANCELLATIONS

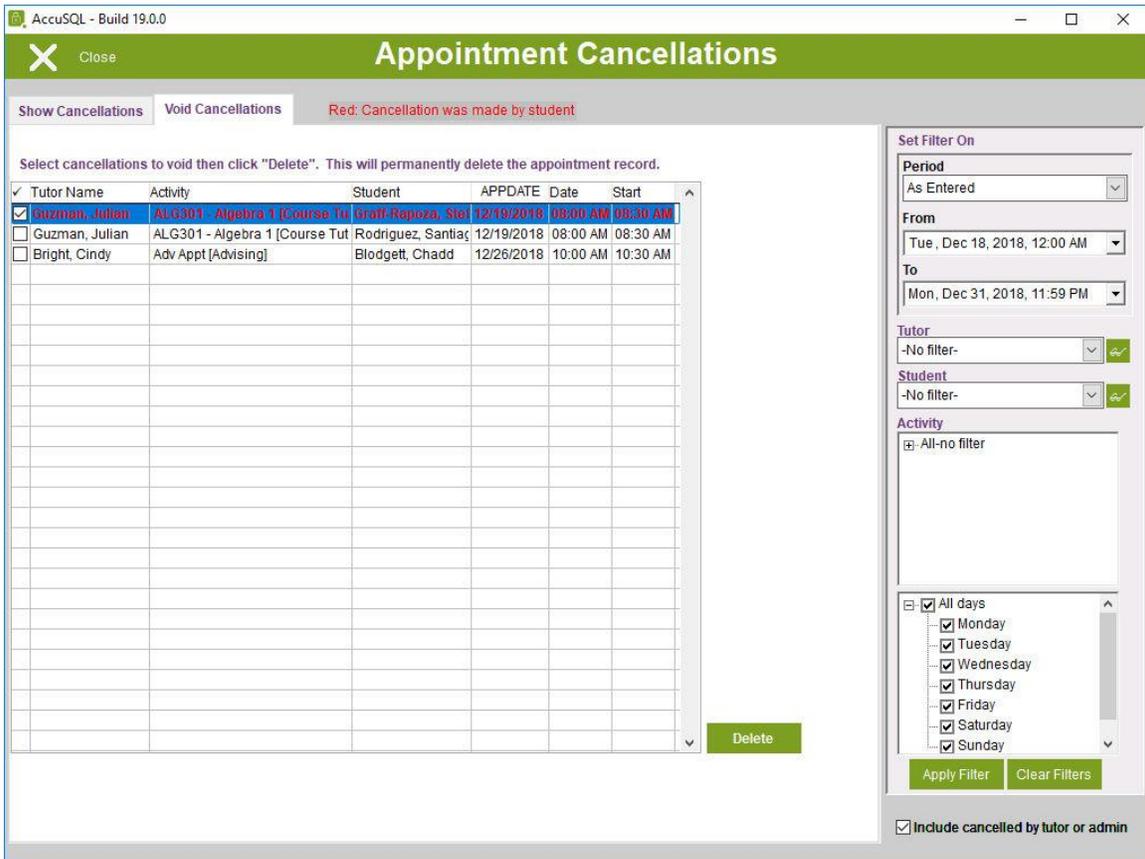
Purpose: To view and void cancelled appointments.

Access: From System Administration, click on View Appointments>> View Cancellations.

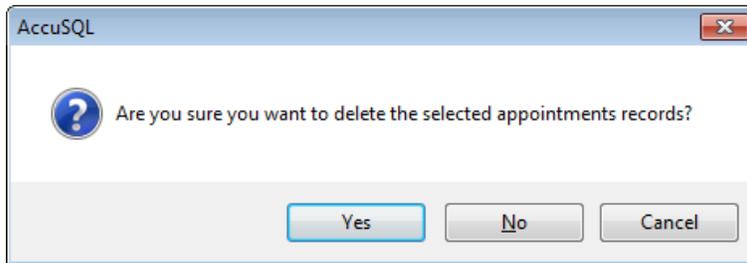
Tutor Name	Activity	Student	Date	Start	End
Guzman, Julian	ALG301 - Algebra 1 [Course Tutoring]	Graff-Rapoza, Steffanie	12/19/2018	08:00 AM	08:30 AM
Guzman, Julian	ALG301 - Algebra 1 [Course Tutoring]	Rodriguez, Santiago	12/19/2018	08:00 AM	08:30 AM
Bright, Cindy	Adv Appt [Advising]	Blodgett, Chadd	12/26/2018	10:00 AM	10:30 AM

This screen lists cancelled appointments. You can use the filters on the right side of the screen to filter the viewed list of cancellations. After you set your filters, click the Apply Filter button. You can reset it back by clicking Clear Filters. The cancellations that show up in red text have been cancelled by students.

If you like, you can also “void” a cancellation. Voiding a cancellation will delete the appointment record, thus neither the appointment nor the cancellation will appear in AccuSQL/AccuTrack Think of a void as the appointment never being scheduled in the first place. To void a cancellation, click on the “Void Cancellations” tab.



Select the appointment(s) you want to void by using the check boxes. To void the selected appointments, click on “Delete”. You will get a confirmation pop-up message. Click Yes to confirm the deletion.



Tip: You can setup AccuSQL/AccuTrack to freeze appointments when a certain number of appointment cancellations are reached. These cancellations only apply if the appointments were cancelled by the student and not by the tutor or an administrator.

VIEW NO-SHOWS

Purpose: To view missed appointments and enter comments. No-shows can also be voided or converted to cancellation using this option.

Access: From System Administration, click on View Appointments>>View No-Shows.

Tutor Name	Class	Student	Date	Start	End
Basoz, Cetin	ICP305 - Intro C++ Programming [Course Tut	Blodgett, Chadd	09/11/2018	08:00 AM	08:30 AM
Basoz, Cetin	JP4400 - Java Programming [Course Tutoring	Conner, Jenelle	10/08/2018	03:30 PM	04:00 PM
Bright, Cindy	Career Placement [Advising]	Conner, Jenelle	12/18/2018	10:00 AM	10:30 AM
Basoz, Cetin	ENG405 - Software Engineering [Course Tutor	Crabtree, Sarah	12/18/2018	10:00 AM	10:30 AM
Basoz, Cetin	ENG405 - Software Engineering [Course Tutor	Graff-Rapoza, Steffanie	11/12/2018	11:30 AM	12:00 PM
Basoz, Cetin	ENG405 - Software Engineering [Course Tutor	Graff-Rapoza, Steffanie	12/14/2018	02:30 PM	03:00 PM
Bright, Cindy	Adv Appt [Advising]	Graff-Rapoza, Steffanie	12/17/2018	10:00 AM	10:30 AM
Guzman, Julian	Adv Appt [Advising]	Graff-Rapoza, Steffanie	12/11/2018	03:00 PM	03:30 PM
Guzman, Julian	Adv Appt [Advising]	Graff-Rapoza, Steffanie	12/14/2018	04:00 PM	04:30 PM
Guzman, Julian	ENG405 - Software Engineering [Course Tutor	Graff-Rapoza, Steffanie	11/27/2018	08:00 AM	09:00 AM
Guzman, Julian	New Student [Advising]	Graff-Rapoza, Steffanie	11/26/2018	11:20 AM	12:20 PM
Guzman, Julian	JP4400 - Java Programming [Course Tutoring	Rodriguez, Santiago	11/27/2018	08:00 AM	09:00 AM

The *SuperTable* in this screen lists missed appointments or no-shows. Here are the fields in this table:

- Tutor Name: name of the tutor with whom appointment was scheduled
- Activity: The service appointment was scheduled for.
- Student: The student that missed the appointment.
- Date: The appointment's date.
- Start: The appointment's start time.
- End: The appointment's end time.

 **Tip:** You can use the *SuperTable* built-in search and sort functions.

NO-SHOW DEFINITION

AccuSQL/AccuTrack calculates missed appointments by comparing the sign-in records with appointments records and will consider a student as showing up for the appointment if all three conditions below are met:

- 1. Student signed in within the appointment's sign-in window:* The window is a period of X minutes before the appointment's time to Y minutes after it. The administrator defines the appointment's sign-in window by setting X and Y in the **Setup page** of the **Set Appointments** module, or through the **Control Panel**. For example, if X is set to 10 and Y is set to 15 and an appointment is scheduled at 9:00 AM, then the appointment's sign-in window is 8:50 AM to 9:15 AM. The student must sign in within this time period to satisfy the first condition.
- 2. Student signed out before some period of the actual appointment time:* The student must be present for at least some portion of the actual appointment time. So if an appointment is from 9AM to 9:30AM, the student must be signed in at least until 9AM or the system would mark them as a no-show for the appointment and their sign in/our period would be logged as a walk-in.
- 3. Student stayed more than the minimum time period:* The student must sign in for a minimum period of Z minutes during the appointment's time. The administrator defines this minimum period by entering it in the **Setup** page of the **Set Appointments** module, or through the **Control Panel**. For example, if the minimum period is set to 30 minutes, the student must sign in for 30 minutes or longer to satisfy this condition.
- 4. Student signs in to the appropriate class:* When the student signs in for the appointment, the student must sign in to the same class the appointment is scheduled. For example, if the appointment is scheduled for Algebra 1, the student must select "Algebra 1" in the Activity Selection screen. If the student selects English Comp 1 instead, the student will be flagged as no-show for the Algebra 1 appointment. If you choose, you can select the Bypass Activities and Tutor Selection screens for appointments sign-ins checkbox in the View Appointments >> Setup >> Appointment Options screen and the activity and the tutor selected at the time the appointment was made will automatically be used at the time of the appointment sign in, hence making this a non- item.

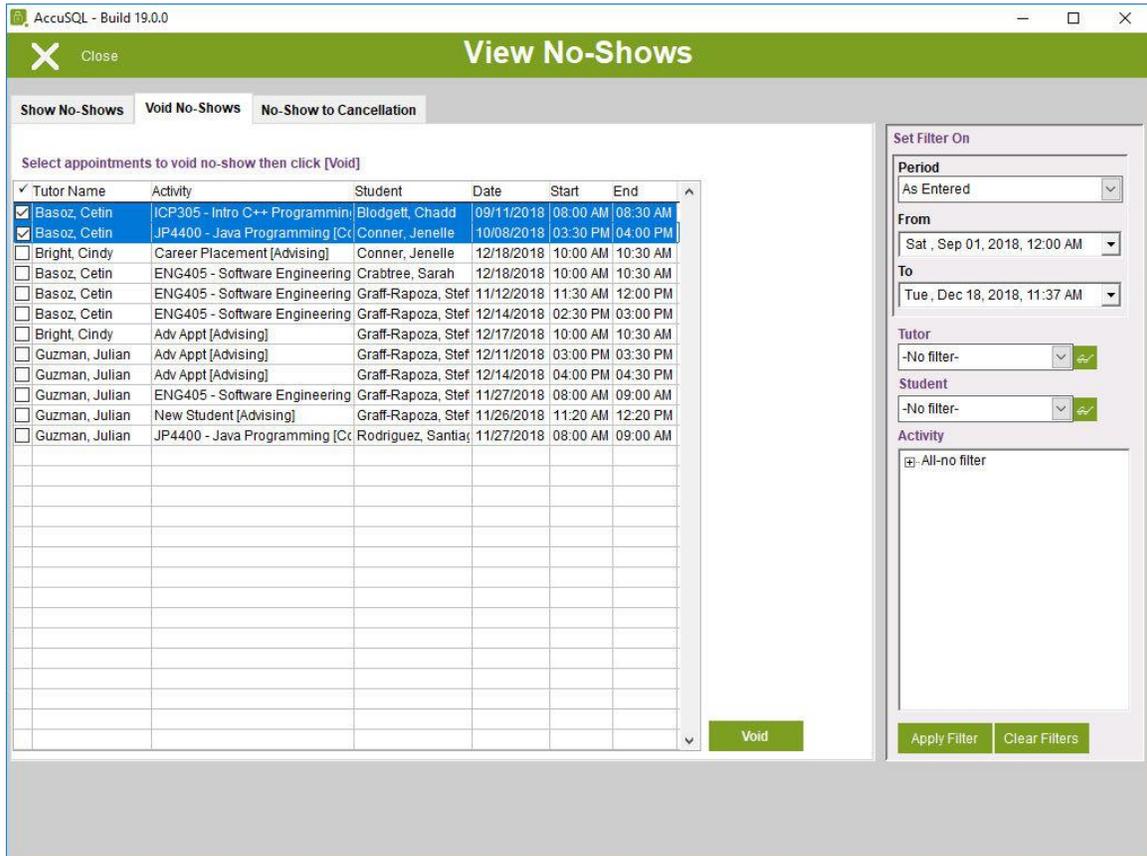
NO-SHOW COMMENTS

Use the edit box under the no-show table to enter the reason for the no-show. To enter a reason, simply select the appointment by clicking on it. The selected record will appear highlighted. After selecting, type the no-show reason in the edit box. The entry is saved automatically.

 **Tip:** The comments you enter here will appear in the no-show report.

VOIDING NO-SHOWS

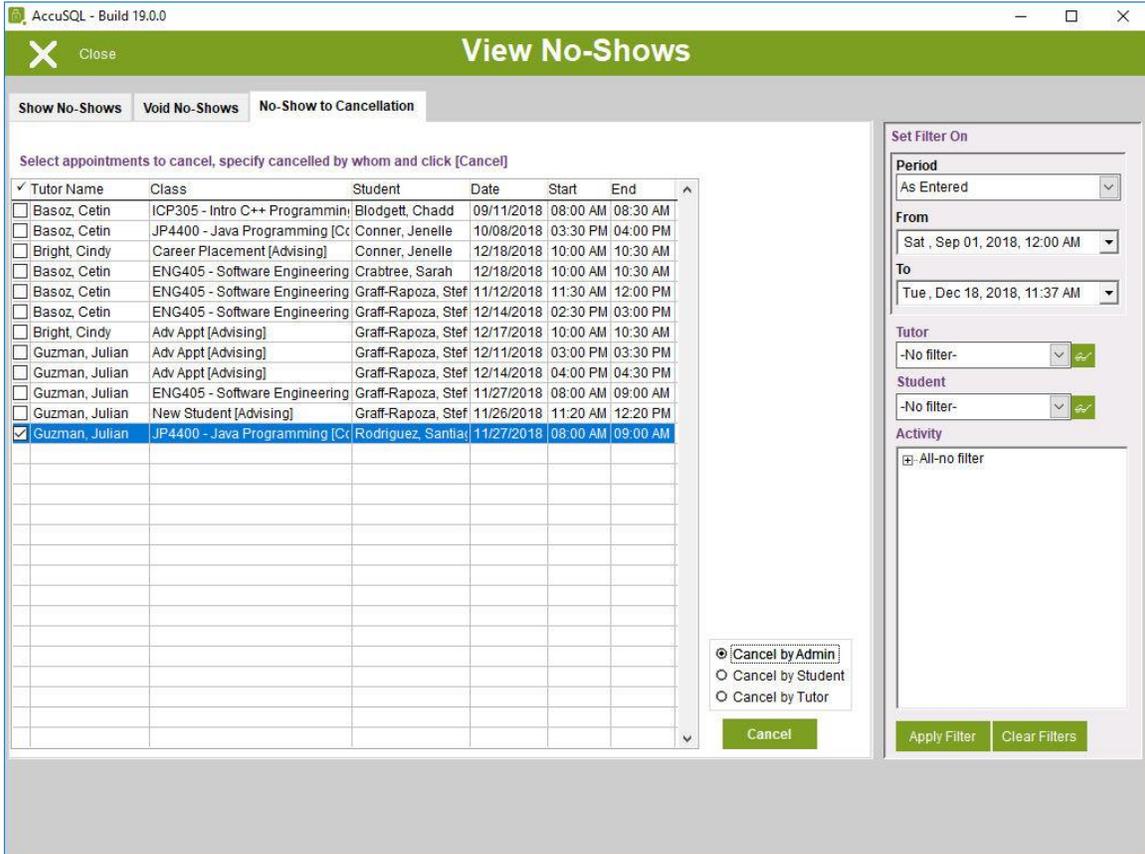
If you would like to void a no-show so it does not count against the student, click on the “Void No-shows” tab:



This screen is similar to the regular no-show screen, except that now each row has a text box that allows you to select it. To void a no-show, select it by checking its box then click on the “Void” button. Voiding a no-show means the no-show will no longer appear on the screen and will not count against the student when calculating the maximum allowed no-shows per student.

NO-SHOW TO CANCELLATION

If you would like to convert a no-show appointment to an appointment cancellation, click the “No-Show to Cancellation” tab.



This screen is similar to the regular no-show screen, except that now each row has a text box that allows you to select it. To convert a no-show appointment to a cancellation, select it by checking its box then click on the “Cancel” button. You may also choose who the appointment was canceled by. Select one of the three buttons, “Cancel by Admin”, “Cancel by Student”, or “Cancel by Tutor”.

VIEW APPOINTMENTS SETUP OPTIONS

The View Appointments Setup Options are exactly the same as the Setup options in the Set Appointments >> Setup screen. Please refer to the Set Appointments Setup Options discussed previously for detailed information.

MEDIA CHECK-OUT OPTIONS

When you click on Media Check-out from the Main Menu, you will see the following options:

- Media Stock: Allows you to create the media items you checkout to students.
- Media Check-In/Out: Allows you to check the media out to students.
- Express Media Checkout: A quicker method for checking out media to students.

The following sections have more information on the above screens.

MEDIA STOCK SCREEN

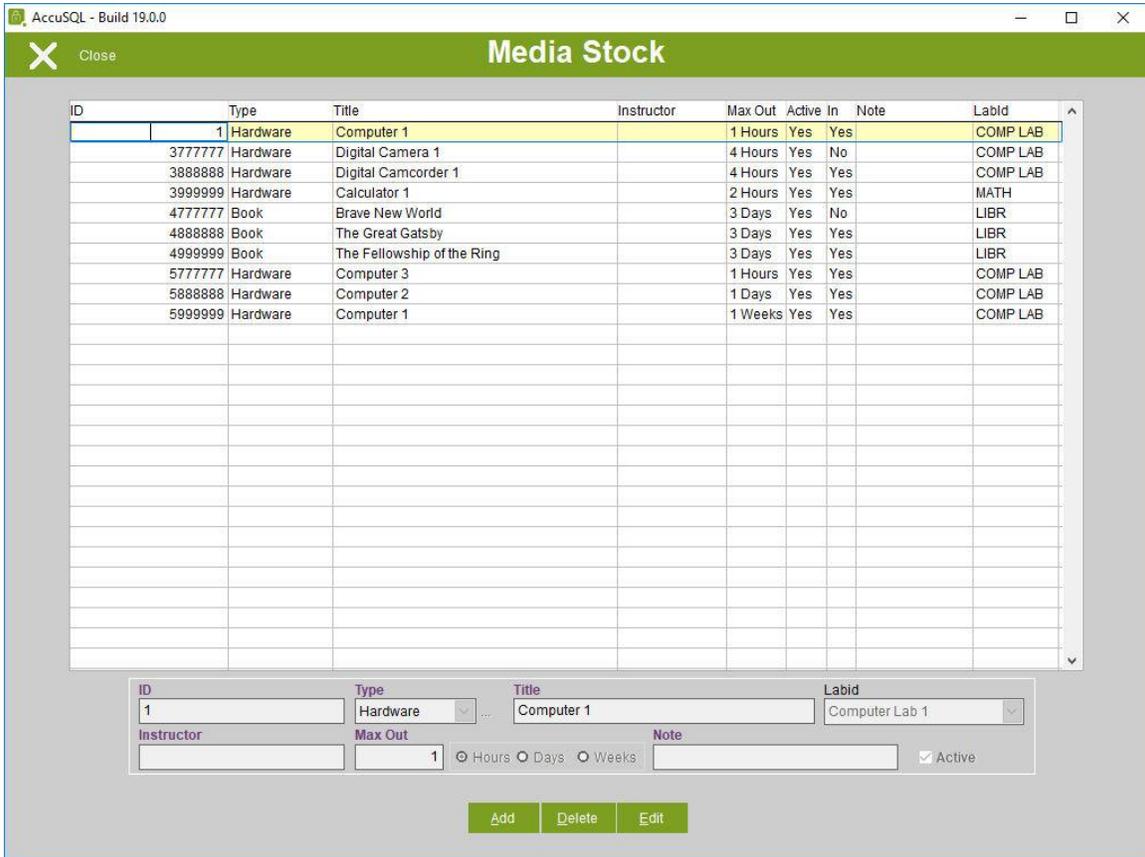
Purpose: To enter and maintain your media stock.

Access: From System Administration, click on Media Check-out → Media Stock.

You can use AccuSQL/AccuTrack to checkout and track loaned materials. For example, you can track laptops, DVDs, reference books, headphones, tablets, and anything else you loan to students. The software will track the material, report on checkouts, and tell you which material is past due.

To start tracking your loaned material with AccuSQL/AccuTrack, you need to assign each piece a unique ID number. Label each item with its number. The ID number will make the checkout and check-in process much quicker and more accurate.

After labeling your media with unique ID numbers, you need to enter them in AccuSQL/AccuTrack. Click on “Media Checkout” → Media Stock button to bring up the Media Stock screen:

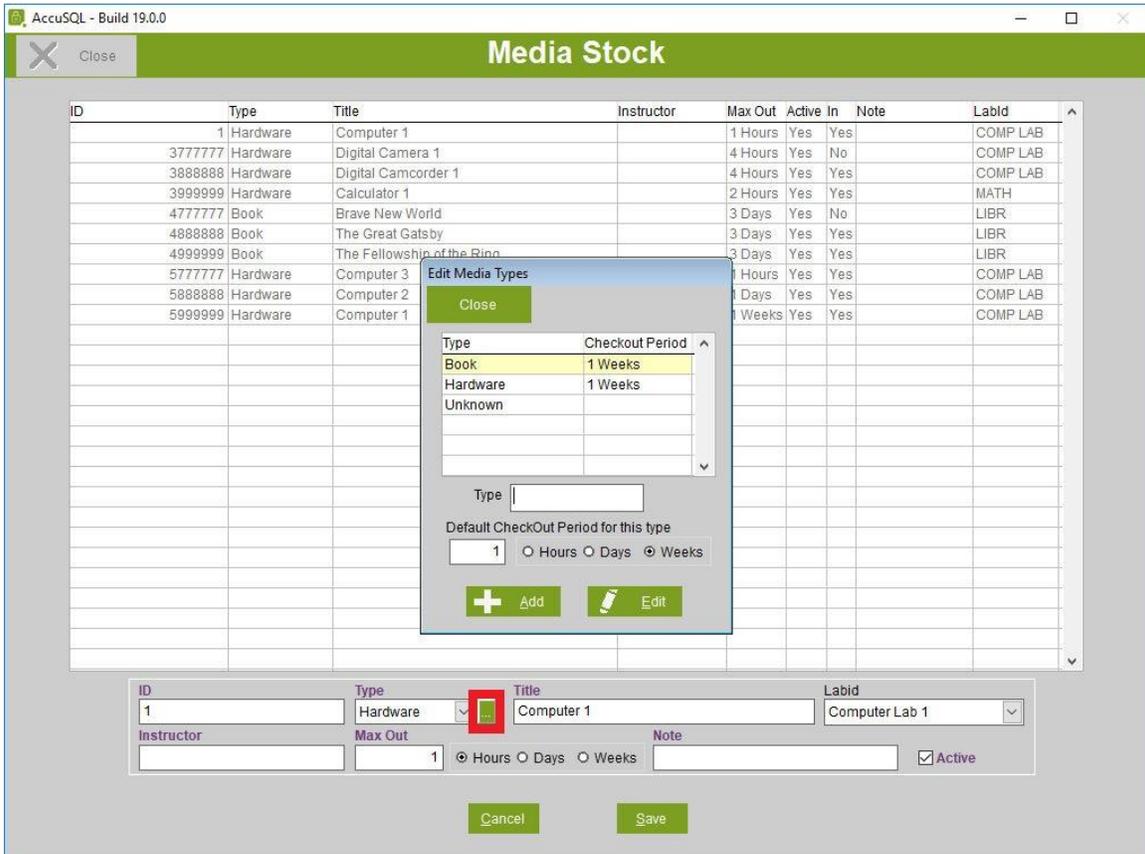


Here’s how to add a media item:

1. Start by selecting the “Add” button and typing in the unique ID number in the “ID” box.
2. Select the media type by using the drop-down list box. If the type is not there, you can add it by clicking on the “...” button.
3. Enter the media title in the “Title” box.
4. (Optional) Type the instructor in the “Instructor” box.
5. (Optional) Type the maximum checkout period in the “Max out” box. This value is for your own information.
6. (Optional) Type any notes regarding this piece in the “Notes” box. The notes can be anything you like such as “Two parts”, “65 minutes long”, or “hand out with instructor notes.”
7. Click on the “Save” button to save your entry.

Defining the Media Types

AccuSQL/AccuTrack allows you to custom define the media types you have available for checkout. You will need to add the Media Types and then you can assign your media stock items to their various Types. To create a new Media Type, first click the Add button. You will see a small button with the ... next to the Type drop-down box. Click that button to access the Edit Media Types screen.



To add a Media Type, simply enter the Type in the text field and then determine the checkout period for this type of item. For example, let's say you have some Laptops you loan to students. You can define the Type here and then determine the default checkout period for those laptops. The checkout period is what AccuSQL/AccuTrack will use in turn to determine when a media item is late where you can then automatically send out late media email reminders to your students

After you are done, click the Add button to save the new media type.

To edit an existing media type, select it and click on the "Edit" button.

Tip: The default media type checkout period you enter here takes precedence over the default check out period for the center (defined in the Setup screen).

You can now associate your Media Stock to specific Lab IDs

The screenshot shows the 'Media Stock' application window. At the top, there's a title bar with 'AccuSQL - Build 19.0.0' and a 'Close' button. Below the title bar is a green header with the text 'Media Stock'. The main area contains a table with the following columns: ID, Type, Title, Instructor, Max Out, Active, In, Note, and Labid. The table lists several items, including computers, cameras, calculators, and books. At the bottom of the window is a form for editing an item. The form has fields for ID (3777777), Type (Hardware), Title (Digital Camera 1), Instructor, Max Out (4), and Note. There are radio buttons for 'Hours', 'Days', and 'Weeks', with 'Hours' selected. A 'Labid' dropdown menu is open, showing a list of options: Computer Lab 1, Computer Lab 1, Library, Mathematics Center, Music Room, Student Success Cent, Tutoring Center, and Writing Center. The 'Computer Lab 1' option is highlighted. There are 'Cancel' and 'Save' buttons at the bottom of the form.

ID	Type	Title	Instructor	Max Out	Active	In	Note	Labid
1	Hardware	Computer 1		1 Hours	Yes	Yes		COMP LAB
3777777	Hardware	Digital Camera 1		4 Hours	Yes	No		COMP LAB
3888888	Hardware	Digital Camcorder 1		4 Hours	Yes	Yes		COMP LAB
3999999	Hardware	Calculator 1		2 Hours	Yes	Yes		MATH
4777777	Book	Brave New World		3 Days	Yes	No		LIBR
4888888	Book	The Great Gatsby		3 Days	Yes	Yes		LIBR
4999999	Book	The Fellowship of the Ring		3 Days	Yes	Yes		LIBR
5777777	Hardware	Computer 3		1 Hours	Yes	Yes		COMP LAB
5888888	Hardware	Computer 2		1 Days	Yes	Yes		COMP LAB
5999999	Hardware	Computer 1		1 Weeks	Yes	Yes		COMP LAB

 **Tip:** If you have your media stock in an electronic file, you can import the media stock via the database Import Wizard, which is discussed in a different section of this manual. You are required to define you Media Types prior to doing your media imports since media type is one of the fields you need to map for your import.

MEDIA CHECK-IN/OUT SCREEN

Purpose: To check media in or out.

Access: From System Administration, click on Media Check-out → Media Check In/Out.

To check media in or out, type the Media ID number in the Media ID box. One of three things will happen depending on the status of the media piece:

1) IF THE MEDIA IS CURRENTLY CHECKED IN

AccuSQL/AccuTrack will display a check mark “✓” in the *In* checkbox and will show the media information by filling out the Title, Instructor, Type, Max Out, and Media Note boxes from information you entered in the “Media Stock” screen. AccuSQL/AccuTrack will also calculate and display the media’s due date in the “Due Back” box. The checkout box will show current date and time, and the caption of the “Process” button will change to “Check Out”.

Note: AccuSQL/AccuTrack calculates the media’s due date like this:

1. If a default checkout time is defined for the media item in the Media Stock screen, this

default time is used.

2. If the item does not have a default check out time, and the media type has a default checkout time defined, the default media type checkout time is used.
3. If the default media type checkout time is not defined, the default center checkout time is used.

To check the media out, follow these steps:

1. Adjust the due back time if needed. You can do this by typing the adjusted value in the “Due Back” box or by clicking on the box with the right mouse button and using the calendar.
2. (Optional) Enter a checkout note in the “Note” box.
3. Enter the ID number of the student who wants to check out this piece in the “Student ID” box. When you enter the ID, AccuSQL/AccuTrack will automatically load the student’s name, phone number, and the number of media items the student currently have checked out. AccuSQL/AccuTrack will also list these media items in the “Student has” box.
4. (Optional) Select the student’s instructor from the Instructor’s drop-down box.
5. (Optional) Select the student’s class from the Class drop-down box.
6. Click on the “Check Out” button.

The software will also display information about the student who checked out the media including ID, name, phone, instructor, class, and whether the student is currently signed-in. The software will also change the caption of the “Process” button to “**Check In**”

2) IF THE MEDIA IS CURRENTLY CHECKED OUT

AccuSQL/AccuTrack will display a check mark “✓” in the *Out* checkbox and will show the media information by filling out the Title, Instructor, Type, Max Out, and Media Note boxes from information you entered in the “Media Stock” screen. AccuSQL/AccuTrack will also display the checkout information including the checkout time and due time and information on the student who has the media checked out. The caption of the “Process” button will change to “Check In”.

Checking Media In

To check the media in, all you need to do is click on the “**Check In**” button, and AccuSQL/AccuTrack will record the check-in date and time. AccuSQL/AccuTrack will show a confirmation message and will then clear the text boxes.

3) IF THE MEDIA ID IS NOT RECOGNIZED

If you enter a media ID that is not recognizable by AccuSQL/AccuTrack, you will see an error message:



 **Tip:** To find out which media a certain student has checked out, just enter his or her ID in the “Student ID” text box. You can then use the horizontal bar on the grid labeled “Student has” to read information such as media ID, title, type, checkout and due time.

 **Tip:** If you have a barcode reader, you can print an ID barcodes for the media items and scan the barcode to check media in or out.

 **Tip:** Instead of using the media ID number, you can use the lookup buttons at bottom of this screen. The “Available” button shows media that is checked in, the “Out” button shows media that is checked out, the “Late” button shows past due media, while the “All” button shows all media.



EXPRESS MEDIA CHECKOUT SCREEN

Purpose: To check media in or out.

Access: From System Administration, click on Media Checkout → Express Media Checkout.

The Express Media Checkout opens with the **Single Mode** radio button allows single items to be checked out.

AccuSQL - Build 19.0.0

Close

Express Media Checkout

Single Mode Multi Mode

Media:

Media ID Title Instructor

Type Max Out: Media Note: In Out Active

Student:

Student ID Name Phone # Out In Active

Student has

ID	Title	Type	Out	Due

Choose the Multi Mode radio button to quickly checkout multiple items to a single student.

The screenshot shows the 'Express Media Checkout' window in AccuSQL - Build 19.0.0. The 'Multi Mode' radio button is selected. The 'Media' section contains a table with the following data:

ID	Type	Title	Instructor	Max Out	Active	In	Note
3777777	Hardware	Digital Camera 1		4 Hours	Yes	Yes	
3888888	Hardware	Digital Camcorder 1		4 Hours	Yes	No	
3999999	Hardware	Calculator 1		2 Hours	Yes	No	

The 'Student' section includes fields for Student ID (77777), Name, Phone (() -), and # Out. There are also checkboxes for 'In' and 'Active'. Below these is a table for 'Student has' with columns for ID, Title, Type, Out, and Due.

Tip: If you have a barcode reader for the media and a magnetic stripe reader for the student sign in, you can combine them for the media checkout. The student swipes the card and you scan the barcode and you're done.

MEDIA CHECK-OUT SETUP OPTIONS

To access the Media Checkout Setup options, click Media Check-out in System Administration, then the Setup tab.

The screenshot shows the 'Media Check-out Setup' window in AccuSQL - Build 19.0.0. The window has a green header with the title 'Media Check-out Setup' and a 'Close' button. The main content area is titled 'Media Return Rules' and contains the following options:

- Allow Saturday check-in
- Allow Sunday check-in
- Media must be returned by: 09:45 AM PM
- Media default checkout period: 1 Hour Day Week
- Turn off pop up that asks if you would like to print a slip when you check out an item
- All media must be returned by: //

At the bottom of the window, there is a 'Lab:' dropdown menu set to '- Default -' and two buttons: 'Cancel' and 'Save'.

Use this screen to set up options for media checkouts. AccuSQL/AccuTrack uses the selections here in calculating the default media due-back time.

Allow Saturday and/or Allow Sunday check-in: Start by telling AccuSQL/AccuTrack whether you're open on weekends. If you're open Saturdays, check the Saturday check box, and if you're open Sundays, check the Sunday check box. If the check box is unchecked and the due-back date happens to be on that day, AccuSQL/AccuTrack will skip it and use the next business day instead for the return date.

Media must be returned by X AM/PM: You can also specify a time that the media needs to be returned. This is usually your closing time or just before that. For example, if you want all media back by 7:00PM, enter the time in the text box and select PM.

Media default checkout period X Hour, Day, Week: The last text box allows you to enter the default media checkout period for all media items. This can be in hours, days, or weeks.

Turn off pop up that asks you if you would like to print a slip when you check out an item: Checking this option will turn off the pop up asking if you would like to print a slip when checking out an item.

All media must be returned by X: This allows you to set a default date by which all media must be returned.

 **Note:** If you use the "Hour" selection, AccuSQL/AccuTrack assumes the media must be returned the same day, and will use the shorter of the closing time or media checkout period when calculating due-time. For example, if you select 2 Hours as the checkout period and 7:00 PM as the media-return time, and a student checks out the media at 6:00 PM, AccuSQL/AccuTrack will show 7:00 PM as the media due-back time.

AccuSQL/AccuTrack will use this time as the due time for all media unless you define a default *per media type* checkout time or a *per media item* checkout time in the Media Stock screen.

 **Note:** The default due back time you define here applies only if there is no default per-media-type time or a default per media item defined.

 **Note:** The calculated due-back time is shown in the media checkout screen and can be overwritten by the user.

FEEDBACK SURVEYS SETUP

When you click on Feedback Surveys from the Main Menu, you will see the following options:

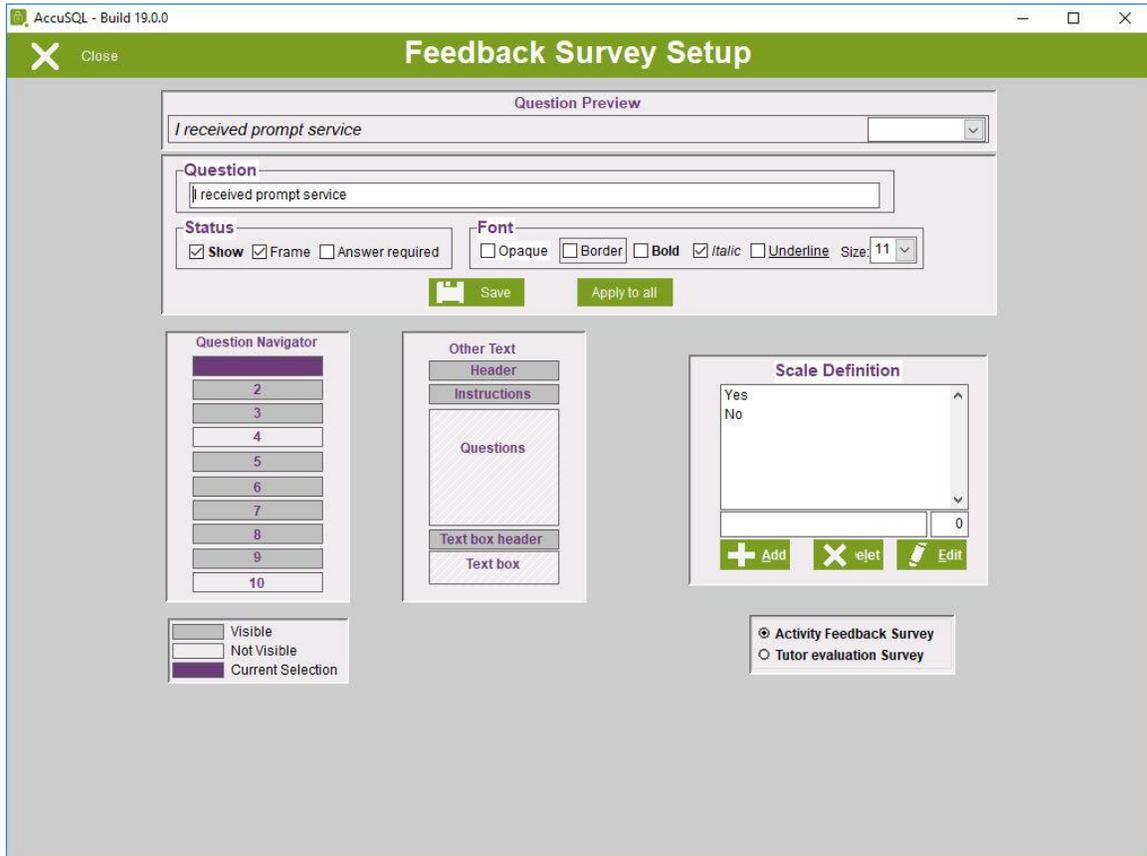
- **Create Feedback Survey:** Allows you to create surveys to present to students for activities and/or for tutor feedback collection.
- **Custom Surveys:** Allows you to create your own surveys using various form elements.
- **Publish Custom Surveys:** Used to determine when, where and to whom your custom surveys will be presented.
- **Custom Survey Reports:** Allows you to view reports for the publications of your custom surveys.

The following sections have more information on the above screens.

CREATE FEEDBACK SURVEY

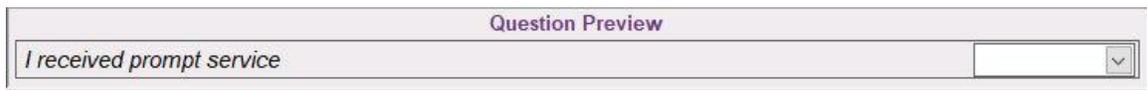
Purpose: To define the survey questions used in collecting feedback from students on services or tutors.

Access: From System Administration, click on Feedback Surveys >>Create Feedback Survey.



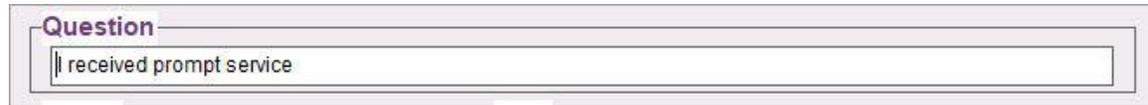
In this screen, you can decide which questions are displayed, enter the questions and define how they look. You can also define the answers scale. Here is an explanation of the elements of this screen:

QUESTION PREVIEW



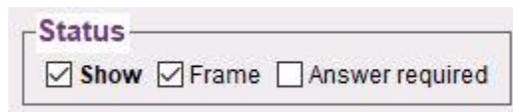
The “Question Preview” box shows how the selected question will appear in the survey. You can change the different options and see how they affect the appearance of the question.

QUESTION



The *Question* box allows you to edit the text of the selected question. The question is selected by clicking on the question number in the Question Navigator.

STATUS BOX



The Status Box allows you to define the status of the selected question. There are three options available:

- **Show:** Check this box if you want the question to be visible in the *Feedback* screen. If you do not need this question, uncheck the Show box.
- **Frame:** Check this box if you want a frame or a border to appear around the question and the answer box.
- **Answer Required:** Check this box if you want students to answer this question. When this box is checked, AccuSQL/AccuTrack will not allow the student to proceed with the sign out until an answer is selected from the drop-down box.

FONT BOX

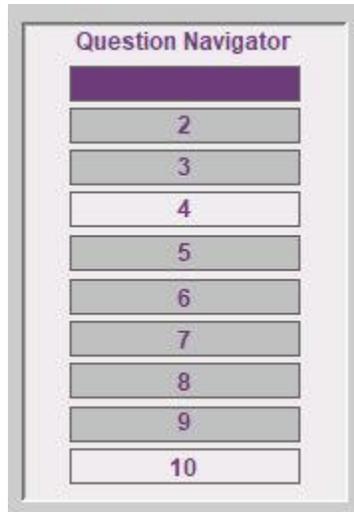


The font box allows you to define the appearance of the question:

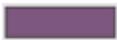
 **Tip:** Use the Question Preview box to see how the question will appear when you make changes in the Font box.

 **Tip:** If you want all questions in the Survey screen to have the same font and status as the current question, click on “**Apply to all**” button.

QUESTION NAVIGATOR

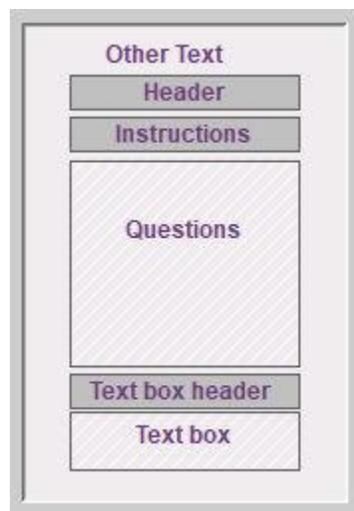


The *Question Navigator* box allows you to select the question you want to set up. The Survey screen has the capacity to show up to 10 questions. These questions are arranged in a single column. To select one of the questions, simply click on its position in the “Question Navigator” box. For example, to select the first question in the first column, simply click on it. The selected question will appear highlighted in a solid color.



 **Tip:** Questions that are set invisible will have a transparent block

OTHER TEXT



This box allows you to change the instructions and open comments text. Here is how:

CHANGING THE HEADER

To change the header title of the Feedback screen, click “Header” box and type in the new header in the Page Header text area. Click “Save” to keep the changes.

CHANGING THE SURVEY INSTRUCTIONS

To change the survey screen instructions, click the “Instructions” box and type in the new instructions in the Instructions text area. Click “Save” to keep the changes.

CHANGING THE OPEN COMMENTS TEXT

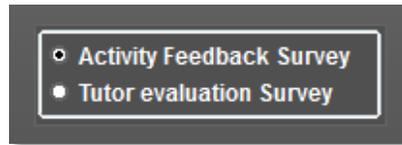
You can change the text appearing above the open comments text box. Simply click “Text box header and type in the new text in the Text Box Header text area. Click “Save” to keep the changes.

SCALE DEFINITION

The screenshot shows a window titled "Scale Definition". It contains a list box with two items: "Yes" (highlighted in blue) and "No". Below the list box is a text input field containing "Not Sure" and a weight input field containing "1". At the bottom of the window are three buttons: a green button with a plus sign and the text "Add", a green button with an 'X' and the text "delet", and a green button with a pencil icon and the text "Edit".

Use the scale definition box to define the scale for the survey. The scale applies to all the questions. Make sure to enter a weight for each item. AccuSQL/AccuTrack will use the weight when calculating the average response score for the question.

SURVEY TYPE SELECTION



The Survey Type options group is located in the lower right portion of the screen. To define the activity feedback questions, make sure that the “Activity Feedback Survey” option is selected. To define the tutor ratings questions, make sure that the “Tutor evaluation Survey” is checked.

The Feedback Survey Setup screen is really two setup screens in one. If you select the Activity Feedback Survey radio button in the bottom left of the screen, then you are setting up the survey that can be presented to students when they have selected a particular activity when they sign in. If you select the Tutor evaluation Survey radio button in the bottom left of the screen, then you are setting up the survey that can be presented to students to evaluate the tutor they have selected when they sign-in.

DEFINING THE SURVEY SCALE

To answer the survey, visitors will need to select one of the options in the drop-down menu. AccuSQL/AccuTrack allows you to define these options. The options can be any appropriate scale such as “Excellent, Good, Poor”, or “Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree”. **All questions will have the same options**, so you only need to enter the scale once.

In addition to entering the scale, you also need to define its weight. The weight is an integer number from 0 to 99. AccuSQL/AccuTrack uses this weight when calculating the average response for each question. For example, if your scale and weights are like this:

- Always: 5
- Most of the times: 4
- Sometimes: 3
- Occasionally: 2
- Never: 1

And 100 people answers this question as follows

- Always: 10 people selected this option
- Most of the times: 25 people selected this option
- Sometimes: 45 people selected this option

- Occasionally: 15 people selected this option
- Never: 5 people selected this option

AccuSQL/AccuTrack will calculate the average response to this question like this:

$$(10*5 + 25*4 + 45*3 + 15*2 + 5*1) / 100 = 3.3 \text{ (Sometimes)}$$

Important: The answers you enter in the Scale Definition area are used by every survey question. When you enter the questions for the survey, keep that in mind so the answers will make sense for every question.

 **Tip:** When entering non-answer options such as *Not Applicable*, *N/A*, and “Don’t Know”, use a weight of 0 and AccuSQL/AccuTrack will exclude this answer from the average calculation.

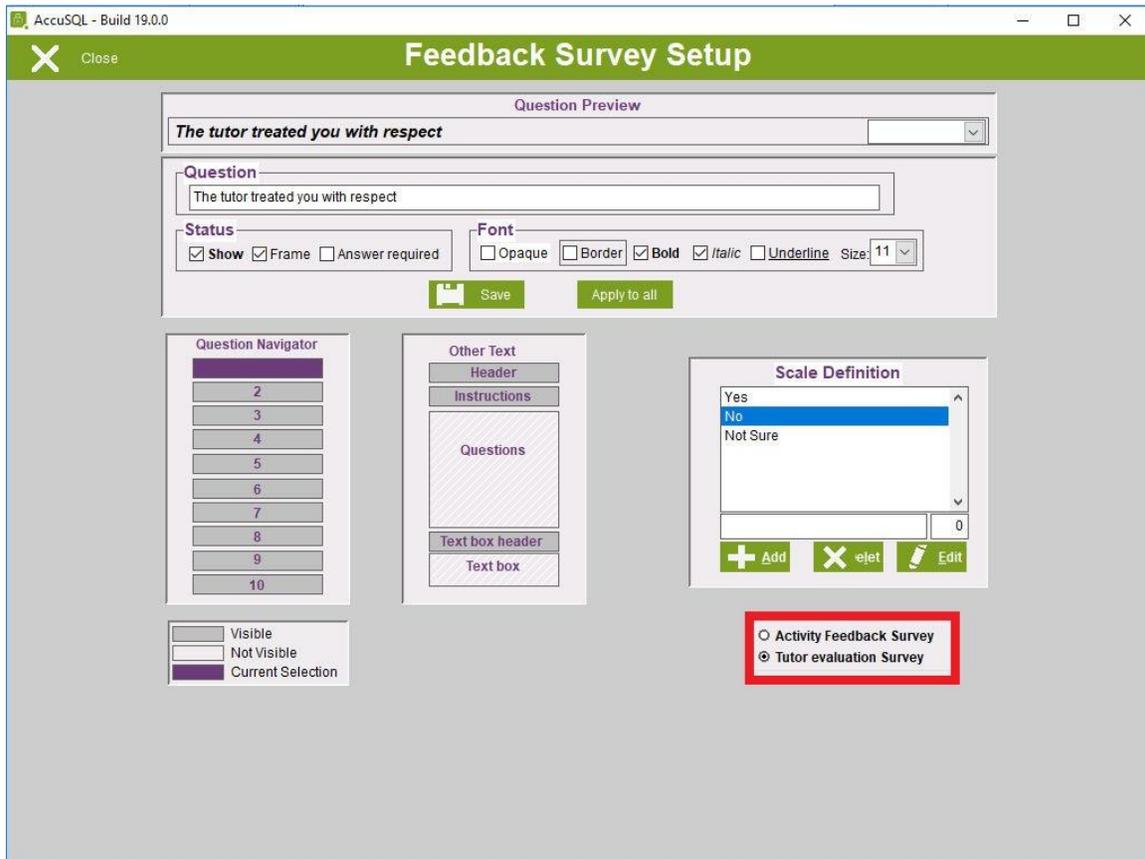
TUTOR EVALUATION SURVEY

You can also use the Feedback Survey Setup screen to collect tutor ratings. The process is identical to what we did above but instead of collecting feedback on activities we will be collecting feedback on the tutors.

ENTERING THE TUTOR SURVEY QUESTIONS

To set up the Tutor Rating module, start by setting up the tutor rating survey. From the System Administration screen click on Student Setup then click on Survey. You will an options group at the bottom of the screen that allows you to select whether you are setting up a service rating survey or a tutor rating survey. Click on the “Tutor evaluation Survey” option to set up the tutor ratings survey.

Enter the questions exactly as you did when setting up the Activity Feedback Survey.



If you are not sure how to do this check the sections above for details.

CUSTOM SURVEYS

Purpose: To define custom survey questions used in collecting feedback from students and or tutors at sign in or sign out.

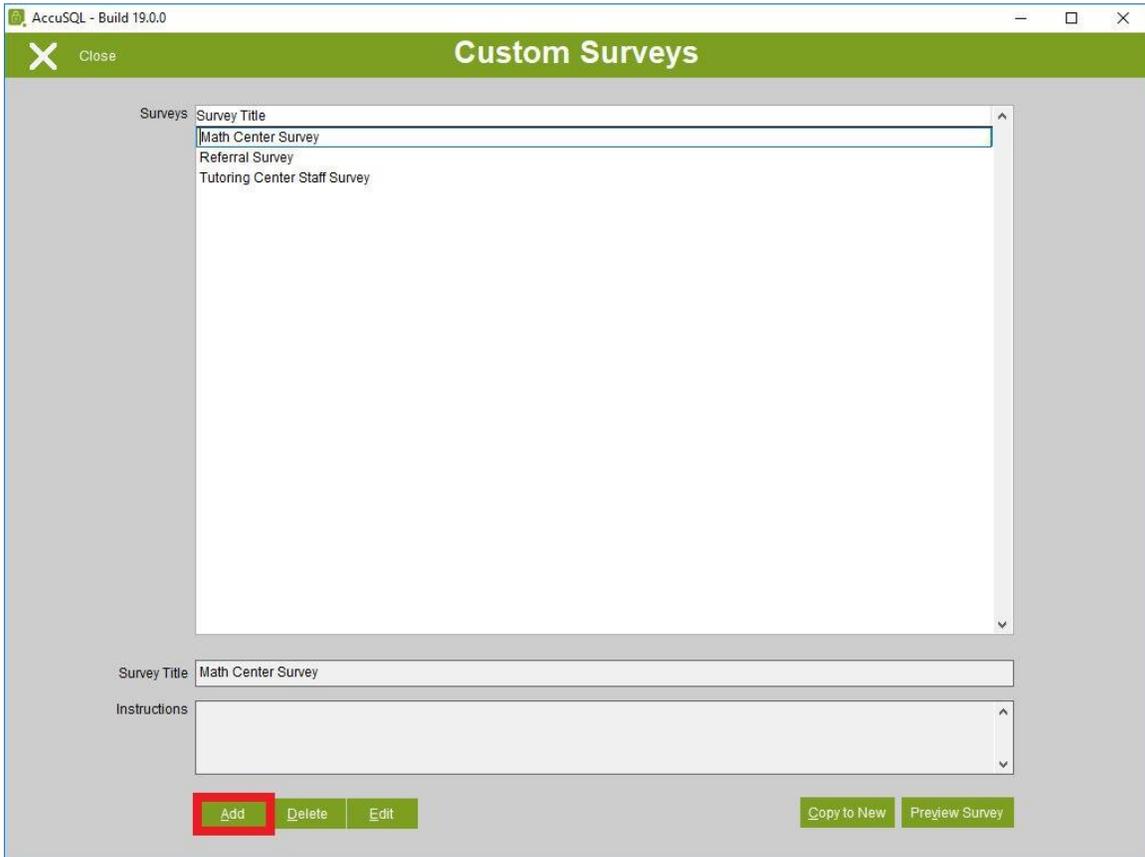
Access: From System Administration, click on Feedback Surveys >>Custom Surveys.

The Survey Manager offers the following advantages over the other AccuSQL/AccuTrack feedback module:

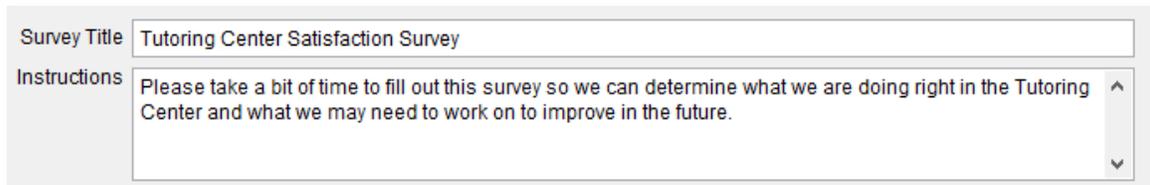
1. You can create unlimited numbers of surveys.
2. Each survey can have unlimited number of questions.
3. You can present the survey to either students or tutors.
4. You can present the survey to a specific Local Lab.
5. You can present the survey to specific students or to a student group.
6. You can present the surveys in the Web Gateway plugin module.
7. Several question formats are supported (radio buttons, check boxes, drop-down window, list box, and text entry).
8. Surveys appear in html format.
9. You can get powerful reports on published surveys, which include charts.

10. You can run a report that contrasts your survey responses with your student profile answers.

When you click the Custom Surveys screen, the first step is to click the Add button to add a new survey to the system. After you click Add from the Custom Surveys screen, you will be presented with the Survey Creator, where you can build the survey.



In the Survey Creator screen, start by typing in the survey’s title and instructions for use.



Next type in the first question and select the type of answer from the Answer Type menu on the right (radio button check boxes, etc.). Now click “Save Question” to add the question. If you want the answer to be required (survey takers cannot close screen unless they answer the question), then click the Answer required checkbox.

Next you need to add the answers for the question you just added. Verify that the question is highlighted, and type in an answer. You can optionally assign a numerical weight or a scale to this answer. Next click the “Save Answer” button. If there are multiple answers, add one then click Save Answer for each answer until you have them all completed for the selected question.

Note: If you are creating a Text answer type, you do not need to add answers.

You can now type in the next question, select its type, save it, and then enter its answers. Repeat this until all the questions and answers are entered. At any time you can click Preview Survey to see what the survey will look like:

Tutoring Center Satisfaction Survey

Tutoring Center Satisfaction Survey

Please take a bit of time to fill out this survey so we can determine what we are doing right in the Tutoring Center and what we may need to work on to improve in the future.

Answer required

Has the Tutoring Center been effective in helping you this semester?

Yes
 No
 Somewhat

What has helped you the most in the Tutoring Center (click all that apply)

The Staff
 The Technology
 The Self-Study Rooms

Answer required

Would you like to see more tutors available?

Did you have to wait more than 20 minutes to get helped?

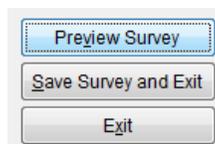
Would you like to see improvements in the following areas? (hold the Ctrl key to select multiple values)

Cleanliness
 Noise Level
 More Computers

Is there anything else you would like to add?

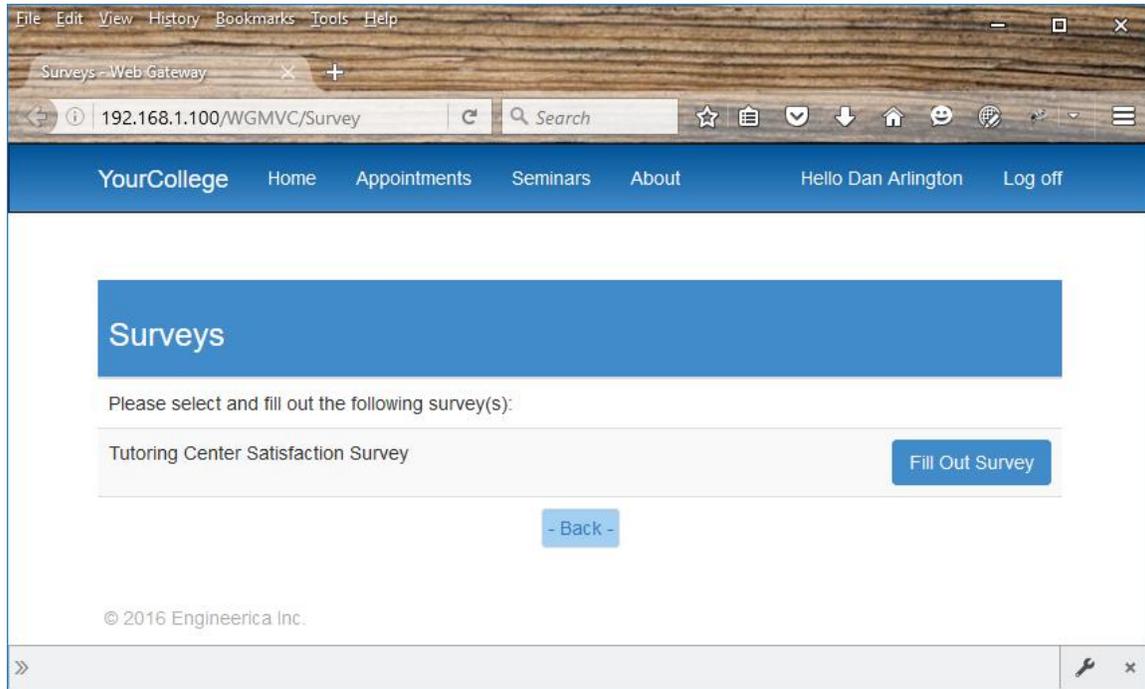
To edit a question, click “Edit” in the question’s row in the Questions grid. To edit an answer, click “Edit” in the answer’s row in the Answers grid.

To save the survey, click “Save Survey and exit”



Note: If you try to edit a survey that already has responders, AccuSQL/AccuTrack will prevent you from doing so. Instead you can click the Copy to New button to copy the existing survey then you can edit the copy. Also, you can delete an existing survey, but if you do so, you will lose all information about the survey responders.

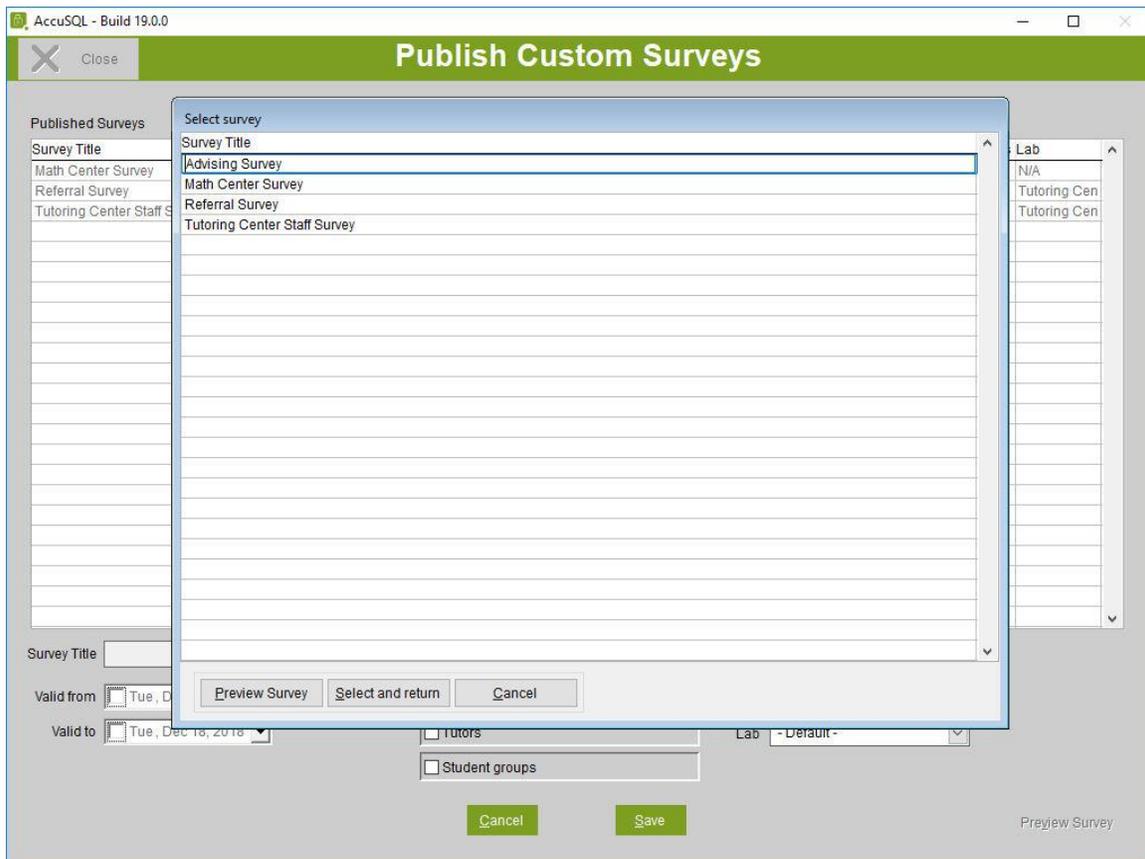
Once you are happy with your survey, the next step is to publish it. If the students and/or tutors fill out the survey via AccuSQL/AccuTrack, it will look just like the preview. In Web Gateway, when the student/tutor signs in, they will first see that a new survey is available:



and when they click the survey, they can fill it out online.

The screenshot shows a web browser window with the following content:

- Browser Header:** File Edit View History Bookmarks Tools Help. Address bar: 192.168.1.100/WGMVC/Survey/Pl. Search bar.
- Navigation Bar:** YourCollege Home Appointments Seminars About Hello Dan Arlington Log off
- Section Header:** Tutoring Center Satisfaction Survey
- Question 1:** Has the Tutoring Center been effective in helping you this semester?
 - Yes
 - No
 - Somewhat
 - Answer Required**
- Question 2:** What has helped you the most in the Tutoring Center (click all that apply)
 - The Staff
 - The Technology
 - The Self-Study Rooms
- Question 3:** Would you like to see more tutors available?
 - Dropdown menu: --Please select-- Yes, you need more tutors No, there are enough
 - Answer Required**
- Question 4:** Did you have to wait more than 20 minutes to get helped?
 - Dropdown menu: --Please select-- Yes No
- Question 5:** Would you like to see improvements in the following areas? (hold the Ctrl key to select multiple values)
 - Cleanliness
 - Noise Level
 - More Computers
- Question 6:** Is there anything else you would like to add?
 - Text input field
- Buttons:** Submit Reset Answers
- Footer:** © 2016 Engineeica Inc.

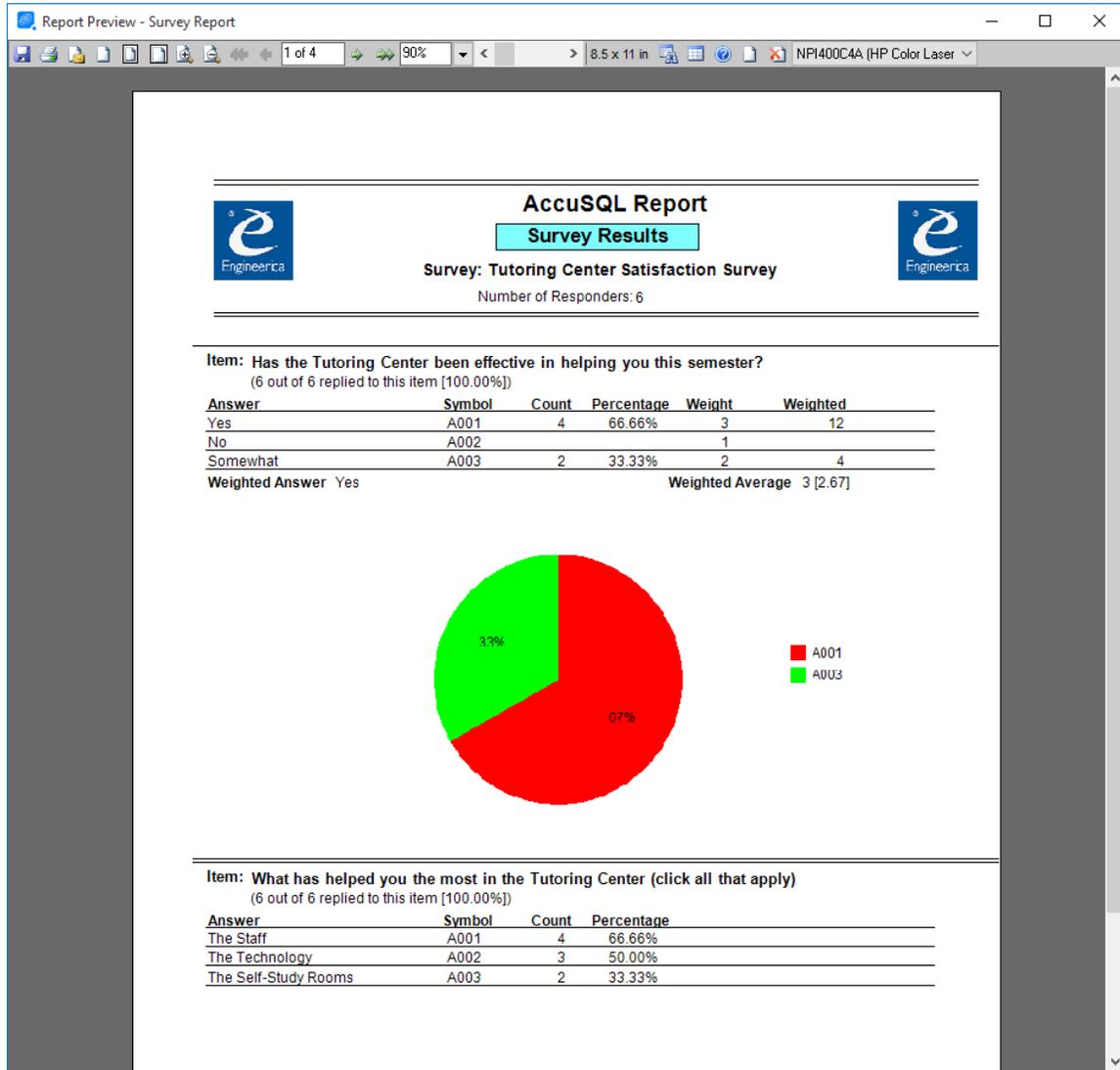


Back in the Publish Custom Survey screen, enter the Valid From and Valid To dates to present the survey. Also, select the Students and/or Tutors checkboxes if you want to present the survey to students, tutors, or both student and tutors. If you prefer, you can click Set Filter and present only to specific students or tutors (if you do not click Set Filter. All student and tutors will be selected by default).

If you want to present the survey in a specific lab, select the lab from the Lab drop-down box. If you want to present it to one or more student groups, click Student groups and then the Set Filter button to select the group(s).

If you want to present the survey at sign in (sign out is the default), click the Present at sign in checkbox. After you have entered the above, click Save to publish the survey and begin using it.

Here is a sample portion of a report:



Here is the same report with profiles:

Question	Answer	ProfileQuestion	ProfileAnswer	Classification?	College	Credits	Ethnicity	Gender					
		Grad Student	Junior	Non-Degree Seeking	Senior	CAS (blank)	100	60 (blank)	Caucasian	Hispanic	Female	Male	Undisclosed
Did you have to wait more than 20 minutes to get helped?	No	1	2	1	1	3	2	1	4				4
	Yes		1			1					1		
Has the Tutoring Center been effective in helping you this semester?	Somewhat		1		1	1	1	1		1			2
	Yes	1	2		1	3	1	1	3			1	2
What has helped you the most in the Tutoring Center (click all that apply)	The Self-Study			1	1	1	1	1		2			2
	The Staff	1	2		1	3	1	1	3		1		2
	The Technology		2		1	1	2	1	2	1			2
Would you like to see improvements in the following areas? (hold the Ctrl key to	More Computers			1	1	1	1	1		2			2
	Noise Level	1	3			3	1	1	3	2	2		2
Would you like to see more tutors available?	No, there are	1			1	2	1	1	2	3			2
	Yes, you need		3			2	1	1	2	1	2		2
Grand Total		5	16	7	5	21	12	5	6	22	11		22

FEEDBACK SURVEYS SETUP

After you have created your feedback surveys using the Create Feedback Survey screen, you will need to decide when and how often you will present those surveys.

If you click Feedback Surveys from the main System Administration screen, then select Setup, you will be presented with a Control Panel Options view that shows context specific options for your Feedback Surveys (more specifically, your Activity Feedback Survey and your Tutor Evaluation Survey).

Note: Custom Surveys are controlled directly from the Feedback Surveys >> Publish Custom Surveys screen and hence have no Setup options.

Here are the Control Panel options for Feedback Surveys in Setup:

- Feedback Survey Options – Used to when you will present your surveys.
- Activity Feedback Options – Used to configure how often you will present the Activity Feedback Survey and for which activities you will present it..
- Tutor Feedback Options Feedback Options – Used to configure how often and under what conditions you will present the Tutor Evaluation Survey.

FEEDBACK SURVEY SETUP OPTIONS

To access the Feedback Survey Setup Options, click Feedback Surveys on the left of the main System Administration screen, then click the Setup tab.

Use this page to configure when the activity and tutor feedback surveys will be displayed to students. The survey is used to collect information from the student about his or her experience at your center and with the tutor. You have the option to display the survey at sign in, sign out or only as an option on the Student Pad using the radio buttons.

AccuSQL - Build 19.0.0

Close

Feedback Surveys Setup

- Feedback Survey Options
 - Activity Feedback Options
 - Tutor Feedback Options

Display feedback survey at:

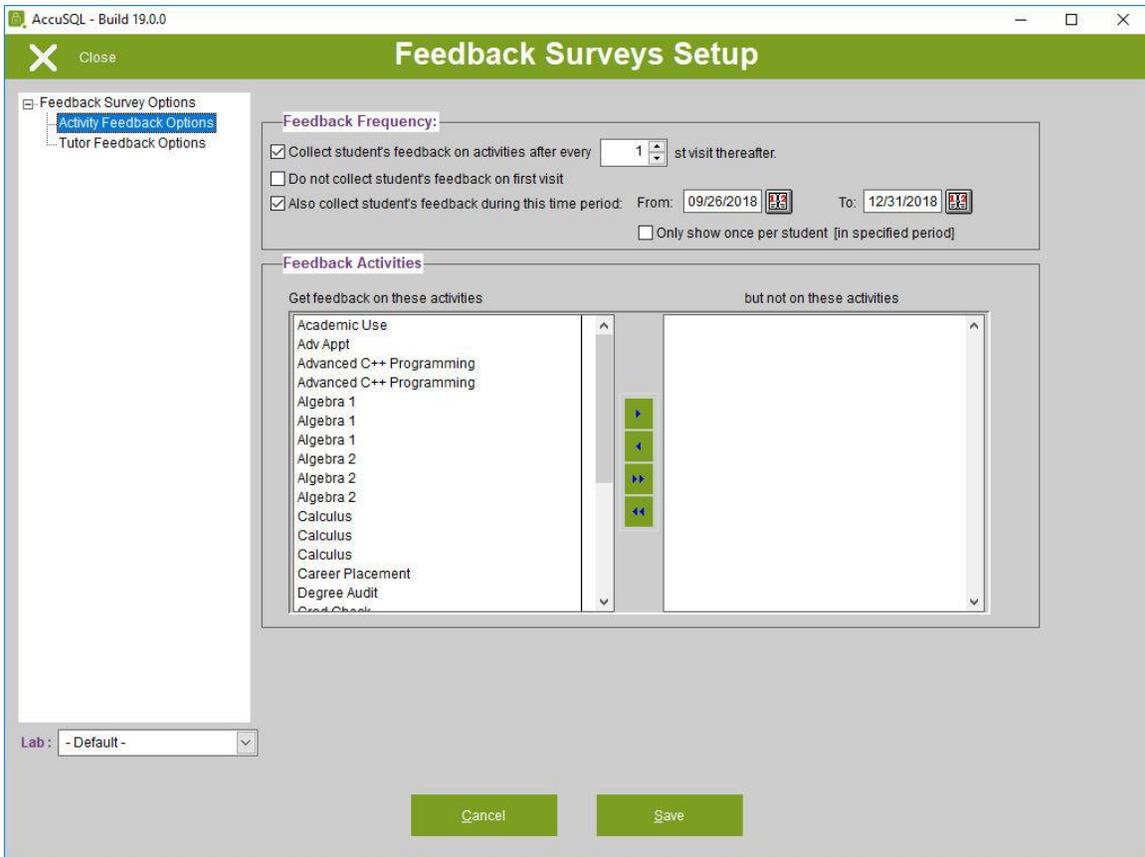
At sign out
 At sign in
 Only in the Student Pad

Lab: - Default -

Cancel Save

ACTIVITY FEEDBACK SETUP OPTIONS

To access the Activity Feedback Setup Options, click Feedback Surveys on the left of the main System Administration screen, then click the Setup tab. On the left side of the Feedback Surveys Setup screen, click Activity Feedback Options.



Use this page if you want to collect feedback from visitors on the activities at your center.

Start by setting up the frequency of the feedback collection and then select the activities you want to get feedback on.

Check the box for 'Collect student's feedback on activities after every (enter the frequency of the feedback collection) visit thereafter' if you want to collect feedback on services. If checked, you can also indicate how often to collect the feedback. For example, enter 2 if you want to collect feedback after every 2nd visit to the activity. The number of visits is counted from the beginning of the semester.

Note: When figuring out the number of visits, AccuSQL/AccuTrack will only count visits to the current activity. This is useful in cases where the visitor comes in for more than one activity.

Check the box for 'Do not collect student's feedback on first call' if you don't want to collect feedback on the first visit to an activity.

Feedback Frequency:

Collect student's feedback on activities after every st visit thereafter.

Do not collect student's feedback on first visit

Also collect student's feedback during this time period: From: To:

Only show once per student [in specified period]

Check the box for 'Also collect student's feedback during this time period' if you want AccuSQL/AccuTrack to collect feedback on services during a certain time period. Enter the start and end date of the time period using the date entry boxes. If you only want to show the feedback once per student during a specified, click this checkbox.

Feedback Activities

Get feedback on these activities

but not on these activities

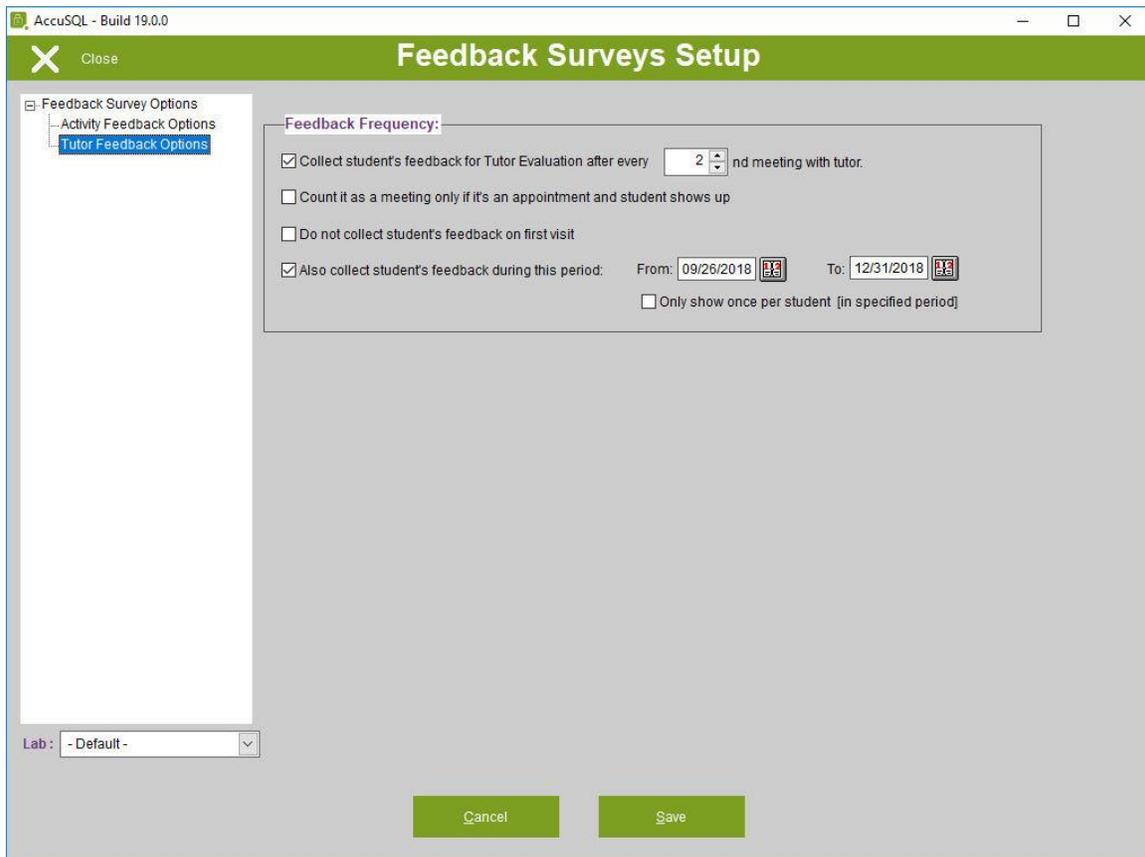
<ul style="list-style-type: none"> Academic Use Adv Appt Advanced C++ Programming Advanced C++ Programming Algebra 1 Algebra 1 Algebra 1 Algebra 2 Algebra 2 Algebra 2 Calculus Calculus Calculus Career Placement Degree Audit Cred Check 	<ul style="list-style-type: none"> ▶ ◀ ▶▶ ◀◀ 	
--	--	--

Use the *Selection List Boxes* control to select the activities you want to collect feedback on. By default, all activities are put in the "Do not collect feedback" box. Move the activities you want feedback collected on to the "Get feedback on these activities" box.

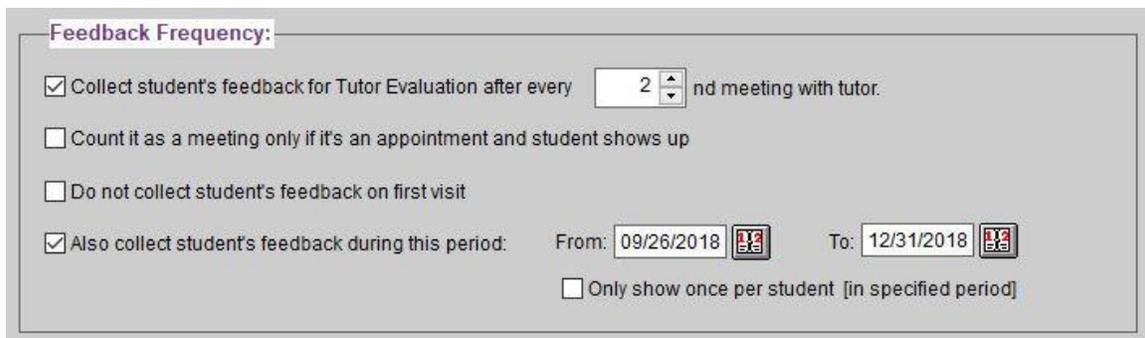
Note: You must have your Lab drop-down box set to –Default- to set your Activity feedback options.

TUTOR FEEDBACK SETUP OPTIONS

To access the Tutor Feedback Setup Options, click Feedback Surveys on the left of the main System Administration screen, then click the Setup tab. On the left side of the Feedback Surveys Setup screen, click Tutor Feedback Options.



Use this page if you want to collect feedback from students about their tutors.



If you want to collect feedback on tutors, check the checkbox for 'Collect student's feedback for Tutor Evaluation after every (enter the frequency of the feedback collection) meeting with tutor.' For example,

if you enter "2", AccuSQL/AccuTrack will collect feedback from the user on every 2nd visit with the tutor. If you do not wish to collect feedback from visitors on the tutors, simply uncheck this box.

Check the checkbox for 'Count it as a meeting only if it's an appointment and student shows up' if you want AccuSQL/AccuTrack to not count no-shows when counting the number of visits for determining whether to collect feedback.

If the checkbox for 'Do not collect student's feedback on first visit' is checked, AccuSQL/AccuTrack will not collect feedback after the first visit or meeting with the tutor.

Check the checkbox for 'Also collect students feedback during this period' to collect feedback during a certain time period. For example, you might select the final week of the semester here.

 **Tip:** Tutor Feedback surveys are used to collect information from students about their experience with a particular tutor. If you want to collect information from tutors about their experiences with students, you would direct the tutors to enter session notes using the Session Log. You can also create tutor Session Questionnaires in the Session Log >> Session Questionnaire Setup screen.

SESSION LOG SCREEN

When you click on Session Log from the Main Menu, you will see the following options:

- Session Log: Use to enter notes and answer a questionnaire about sessions with students.
- Session Questionnaire Setup: Use to set up the session questionnaire that is presented to tutors to answer questions about their sessions with students.

The following sections have more information on the above screens.

SESSION LOG

Purpose: To enter comments on sign-in sessions.

Access: From System Administration, click on Session Log >> Session Log.

If you wish, you can enter comments on each sign-in session AccuSQL/AccuTrack logs. This option is handy if you want to keep a journal of each sign-in session. For example, if you have a tutoring center, tutors can use this feature to keep track of what they did during their meeting with each student. These session notes could serve as a progress tracker for tutors, a method for tracking meetings for administrators, and as a record for the center.

To enter or view comments, click on the “Session Log” button.

USING FILTERS

Use the filters to locate specific sign-in records. Start by restricting the viewed records to a certain time period by entering the “From” and “To” date and time. You can also restrict the viewed records to a certain category, class, student, or tutor. Click on the “Refresh” button to apply the filter.

The Edit box under the grid shows the comment for the current sign-in session (if any). To enter or edit a comment, click on the “Add/Edit” Comments button and type the comment. When finished, click on the “Save Comments” button to keep your changes.

Tip: The sign-in records are displayed in a *SuperTable*. This means you can sort the records by clicking on a column header. You can also do a search by typing in the values. See the *SuperTable* instructions for the details.

 **Tip:** You can generate a report with session log comments that also includes the session questionnaire answers. See the “Session Log” reports for details.

Only show sessions with/without comments or all

Click this box and then click the Refresh button to only show session logs that contain comments, no comments, or all sessions regardless of comments.

Only show sessions with/without questionnaire or all

Click this box and then click the Refresh button to only show session logs that contain an answered session questionnaire, and unanswered session questionnaire, or all sessions regardless of the session questionnaire.

Disable auto refresh

By default the Session Log screen will refresh its data every 30 seconds. If you need more time to work with a record, you can disable this feature, and then simply click the Refresh button manually to load ant new records.

Add/Edit Comments

To enter a new comment, first select the sign-in session by clicking on it, and then click on the “Add/Edit Comment” button. You can now type your comment in the entry box under the sign-in table. You can edit an existing comment by following the same steps above. To view a comment, simply highlight the session by clicking on it.

Delete Comments

To delete a comment, first highlight the sign-in session then click on the “Delete Comment” button.

Email Comment

To email a selected comment to the instructor, click on the “Email Comment” button in the Session Log screen. For this to work, you need to assign an instructor to the class and enter the instructor’s email address. You must also have the correct parameters entered for your email server. If the instructor does not have an email entered for him or her in the Users >> Instructors screen, you can enter the email at the time you send to comments. If the instructor already has an emailed entered, then the comments will be sent automatically to the instructor.

Print Out Comments

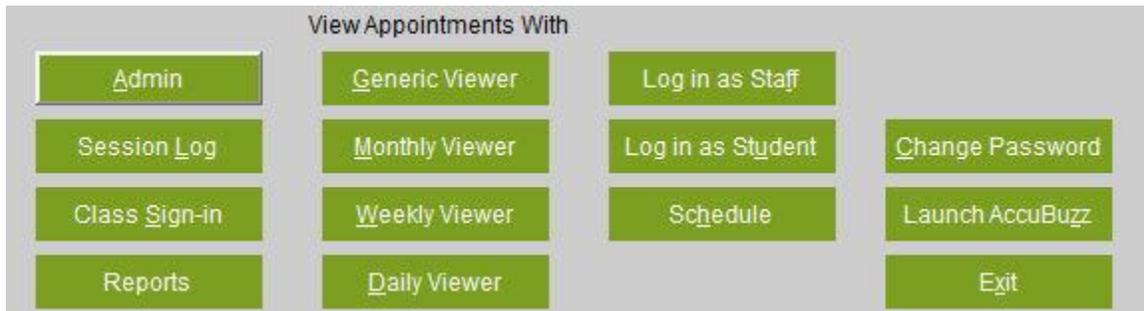
Click this button to send the selected comments to the default printer.

Session Questionnaire

Click to fill out the predefined session questionnaire for the tutoring session. If you do not have a questionnaire already created, please see Session Log >> Session Questionnaire Setup.

HOW TUTORS ENTER COMMENTS

Your advisors or tutors can access the Session Log screen from the sign-in screen. When tutors sign in, they will see a “Session Log” button in the Tutor’s Control Pad.



When the tutor clicks on the “Session Log” button, the tutor will see a list of his or her tutoring sessions only. The tutor can then enter comments on these sessions and also answer the Session Questionnaire, if present. This gives you better control than letting tutors enter the comments via System Administration since each tutor can only view or add comments on his or her sessions.

SESSION QUESTIONNAIRE SETUP

Purpose: Give tutors the opportunity to submit feedback regarding session outcomes in a questionnaire format. Can be used in conjunction with session notes.

Access: From System Administration, click on Session Log>>Session Questionnaire Setup.

The session questionnaire offers tutors the ability to provide feedback on sessions with students. By filling out the session questionnaire, accessible from the Tutor Pad, tutors can answer basic questions regarding student interactions and the tutoring session as a whole. Because these questions are totally customizable, users can cover a nearly boundless variety of topics. From feedback on the student’s preparedness, to an assessment of how well the student grasped the material, the session questionnaire can be useful tool in the evaluation process. Users can also generate reports showing questionnaire responses for specific students, or even create a questionnaire summary in which you can view the number of times an answer was selected, its weight, etc.

To create the session questionnaire, first click Add in the Question section, type your questions and then click Save. If you want the question to show up, make sure Active is selected. You can also make the question required by checking that box.

The screenshot shows a form titled "Question". It contains a text input field with the text "Did the Student come prepared for Algebra 1 Tutoring?". To the right of the input field are two checkboxes: "Active" (checked) and "Required" (unchecked). Below the input field is a "Type" section with five radio button options: "Radio" (selected), "Checkbox", "Combobox", "Listbox", and "Listbox (multiple selection)". At the bottom right of the form are two green buttons: "Cancel" and "Save".

After you have saved the question, click Add in the Answer section and enter the first answer and click Save. If you wish to collect the weighted average for the responses, enter the value for the answer in the Weight spinner box.

The screenshot shows a form titled "Answer". It contains a text input field with the text "Maybe". To the right of the input field are two checkboxes: "Active" (checked) and "Required" (unchecked). Below the input field is a "Weight" section with a spinner box containing the value "0" and a "Not Applicable" button. At the bottom right of the form are two green buttons: "Cancel" and "Save".

Continue adding answers until you have them all completed. You can then add your next question and answers using the same process. Click the Preview button to see what the questionnaire will look like.

Session Log Questionnaire

Session Log Questionnaire

Was student prepared?

Yes
 No
 Partially

(Answer required)

Would you work with student again?

Yes
 No

(Answer required)

Do you recommend a follow-up visit?

Yes
 No

(Answer required)

Do you recommend additional services?

Yes
 No

Did the student like the new AV room setup?

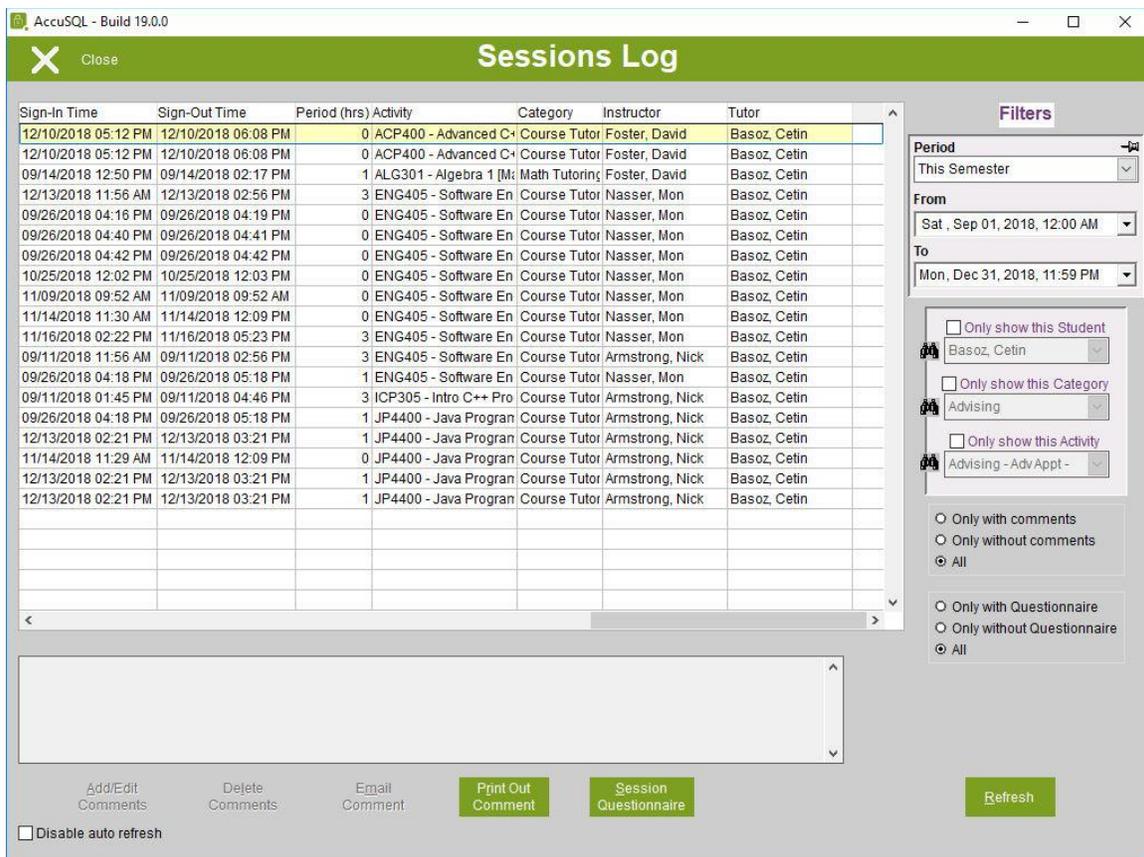
Yes
 No
 N/A

HOW TUTORS USE THE SESSION QUESTIONNAIRE

When tutors sign in, they will see a “Session Log” button in the Tutor Pad.



When the tutor clicks on the “Session Log” button, the tutor will see a list of his or her tutoring sessions only. The tutor can then enter comments on these sessions and also answer the Session Questionnaire by clicking the Session Questionnaire button from the Session Log screen.



ADDITIONAL FEATURES AVAILABLE WITH SESSION QUESTIONNAIRES FOR 2019

You can now create tutor session questionnaires that are both lab specific and activity specific. Here is an example session questionnaire that includes one radio button type question, a checkbox question, and a list box question. Also notice how the questionnaire is associated with the Tutoring Center (at the bottom-left of the screen) and it is also associated with the Algebra 1 activity (bottom-right of the screen):

The screenshot shows the 'Session Questionnaire Setup' interface. It includes a table for defining questions and their associated answer options.

Question	Active	Required	Type
Did the Student come prepared for Algebra 1 Tutor	Yes	Yes	Radio
What hindered the Tutoring session?	Yes	No	CheckBox
Do you recommend additional services?	Yes	No	ListBox (mu

Answer	Active	Weight
One additional session of Tutoring	Yes	1
Two additional sessions of Tutoring	Yes	2
Three additional sessions of Tutoring	Yes	3
4 additional sessions of Tutoring	Yes	4
No additional Tutoring needed	Yes	5

At the bottom of the window, the 'Lab' dropdown is set to 'Tutoring Center' and the 'Specific Activity' dropdown is set to 'ALG301 Algebra 1 [Course Tutoring]'. A 'Preview' button is also visible.

I can click Preview to see what the questionnaire will look like when presented to tutors:

Session Questionnaire

Session Questionnaire

Did the Student come prepared for Algebra 1 Tutoring?

Maybe Definitely Extremely Lacking Somewhat, but not really

* Answer is required

What hindered the Tutoring session?

The student was not prepared for the session The Tutor was not well-versed in Algebra 1

The student was not paying attention during the session

There were too many outside interruptions (Noisy room, too many interruptions by other students/staff, outside construction)

Do you recommend additional services?

-- Select one or more --

One additional session of Tutoring ^

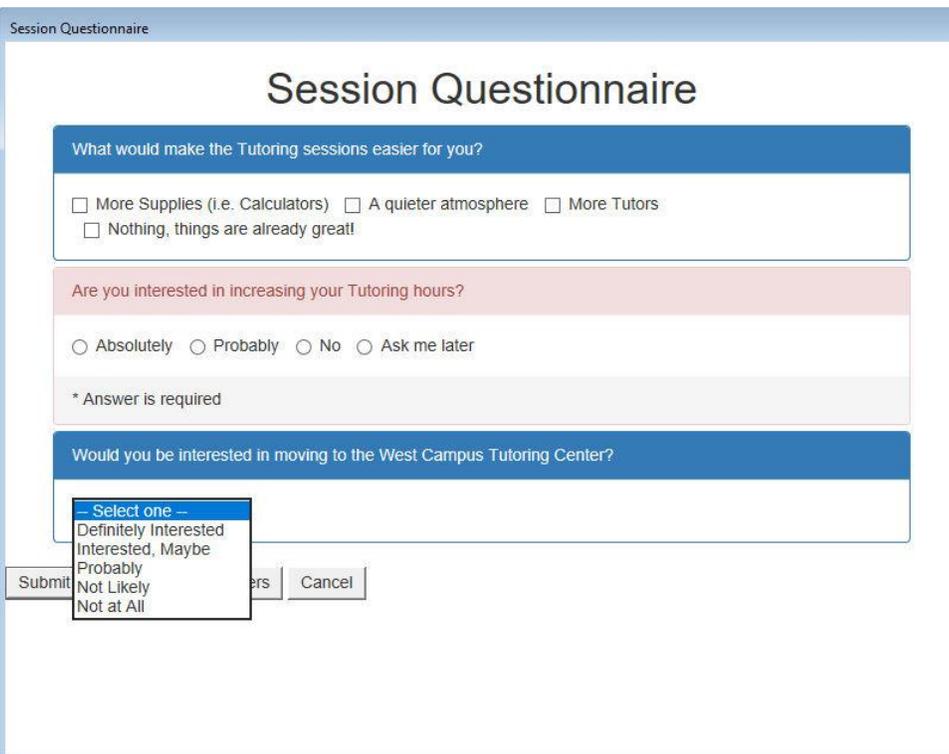
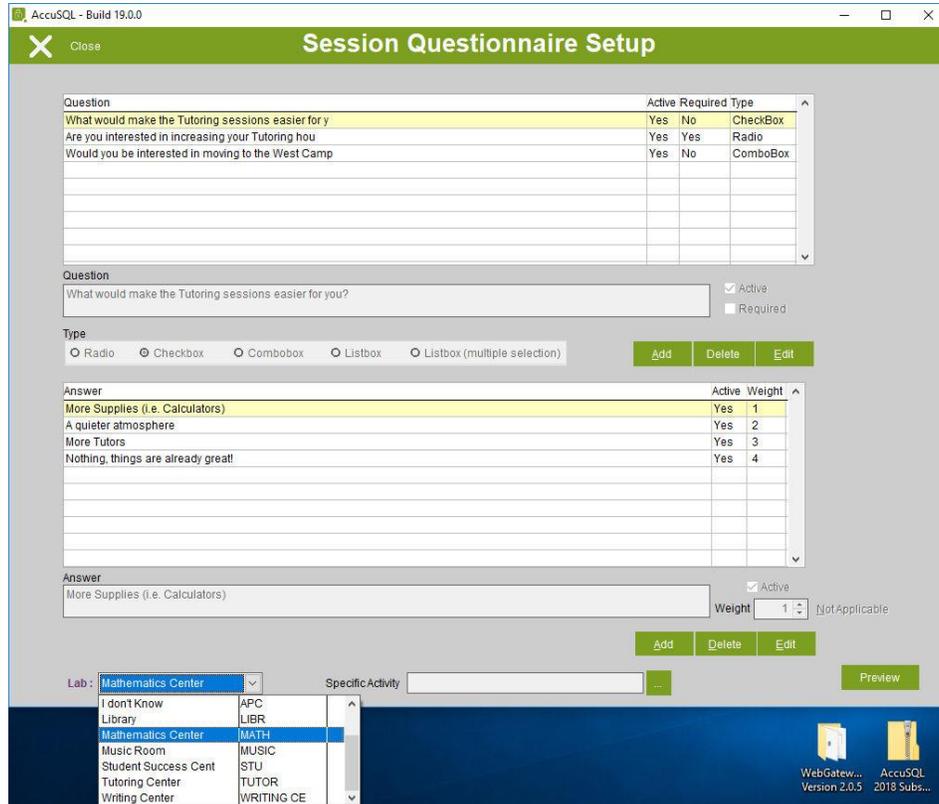
Two additional sessions of Tutoring

Three additional sessions of Tutoring v

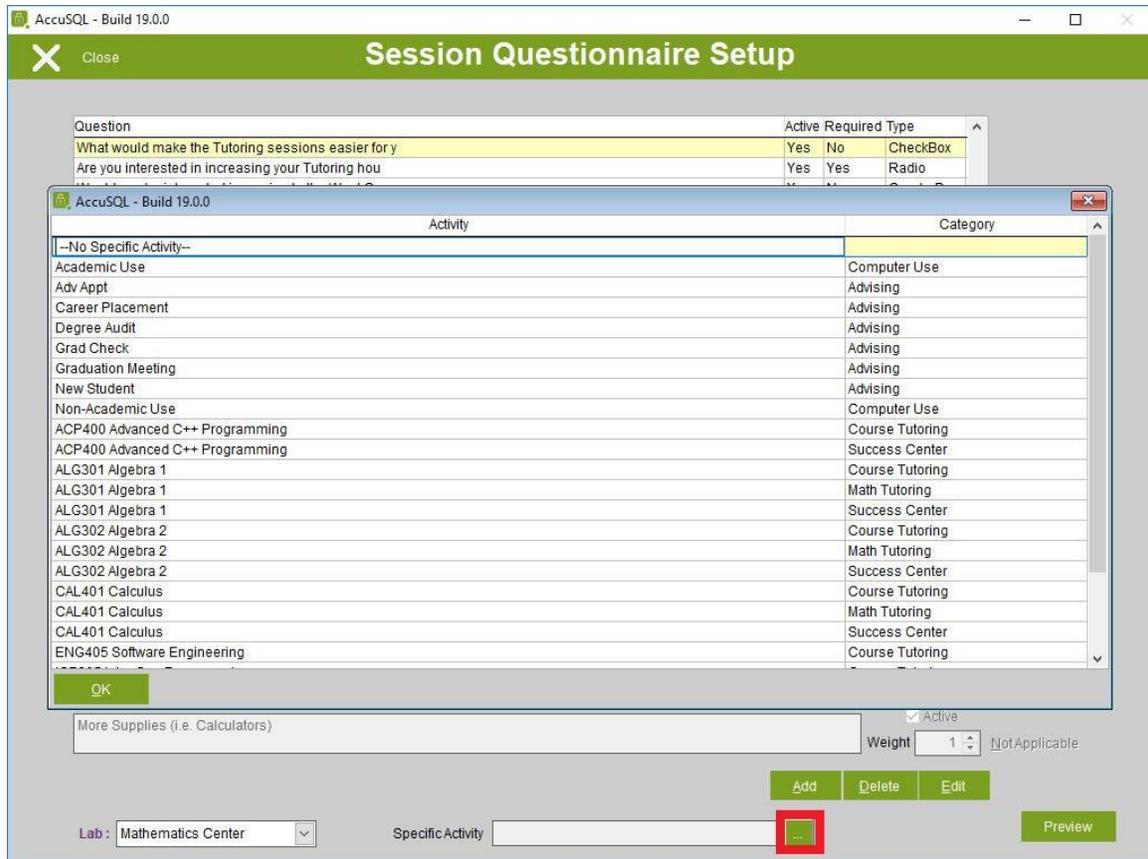
4 additional sessions of Tutoring

Submit Survey Reset Answers Cancel

If you select a different local lab in the Lab drop-down selector, you can then create a completely different questionnaire for the tutors that are working in the Math Lab:



You can also select an activity from the Specific Activity drop-down selector, to create a completely different questionnaire for the Tutors that are assigned to that particular activity.



PROGRAM ASSESSMENT SCREEN

When you click on Program Assessment from the Main Menu, you will see the following options:

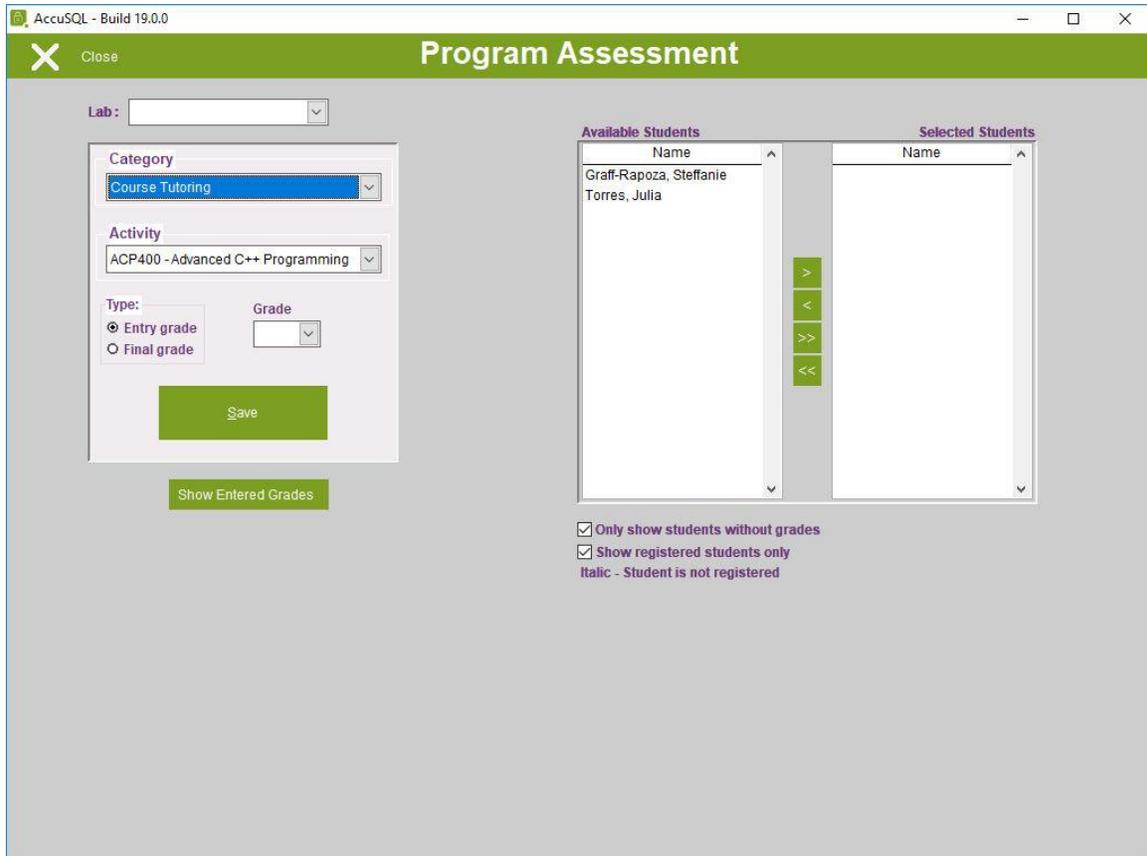
- Program Assessment: Use to enter notes and answer a questionnaire about sessions with students.
- GPA Definitions: Use to set up the session questionnaire that is presented to tutors to answer questions about their sessions with students.

The following sections have more information on the above screens.

PROGRAM ASSESSMENT

Purpose: To enter or view assessment indicators that will be used in generating program assessment reports.

Access: From System Administration, click on Program Assessment >> Program Assessment.



Use the Program Assessment module to evaluate your program’s success. AccuSQL/AccuTrack makes the evaluation by comparing grades before and after using your tutoring program. “Grades” used in this evaluation can be obtained from different sources:

1. Actual testing of students
2. Using an existing test score from instructors or from standard tests.
3. Asking students a question such as “What grade do you expect to receive in this course.”

Here is how it works:

1. Enter the grades of the students before they start using the center (e.g. at the beginning of the semester). We will refer to these grades as *entry grades*.

2. Enter the grades of the students after using the center (e.g. at the end of the semester). We will refer to these grades as *final grades*.
3. Run the assessment report from the Reports screen to examine at the assessment results.

ENTERING THE GRADES

Here is how to use this screen for entering grades:

- 1) Select the Category and then the class from the “Activity” drop-down menu. AccuSQL/AccuTrack will show you the students registered in the selected class. If you like, you can see all students by clearing the “Show registered users only” box.
- 2) Next, select whether you are inputting the entry grade or the final grade. AccuSQL/AccuTrack will display students whose grades have not been entered in the selection list boxes.
- 3) Select all the students who received the same grade by moving their names to the “Selected” list box. For example, select all the students who received “B” entry grade and move their names to the Selected list box.
- 4) Select the grade from the Grade drop-down box.
- 5) Click on “Save” to record the grades.

The screenshot shows the 'Program Assessment' window in AccuSQL. The left panel contains configuration options: 'Lab' (empty), 'Category' (Course Tutoring), 'Activity' (ACP400 - Advanced C++ Programming), 'Type' (radio buttons for 'Entry grade' and 'Final grade', with 'Entry grade' selected), and a 'Grade' dropdown. A green 'Save' button is at the bottom of this panel. Below the configuration panel is a 'Show Entered Grades' button. The right panel features two list boxes: 'Available Students' containing 'Graff-Rapoza, Steffanie' and 'Selected Students' containing 'Torres, Julia'. Between these lists are five green navigation buttons (down, up, double down, double up, and left). Below the lists are two checked checkboxes: 'Only show students without grades' and 'Show registered students only'. A legend below the checkboxes states 'Italic - Student is not registered'.

Repeat the above procedure for entering both grades (entry and final) for all the students.

 **Tip:** Check the “only show students without grades” box if you only want to see names of students whose grades have not been entered. Uncheck the Show registered students only box if you want to see all students whether or not they are registered for the selected class.

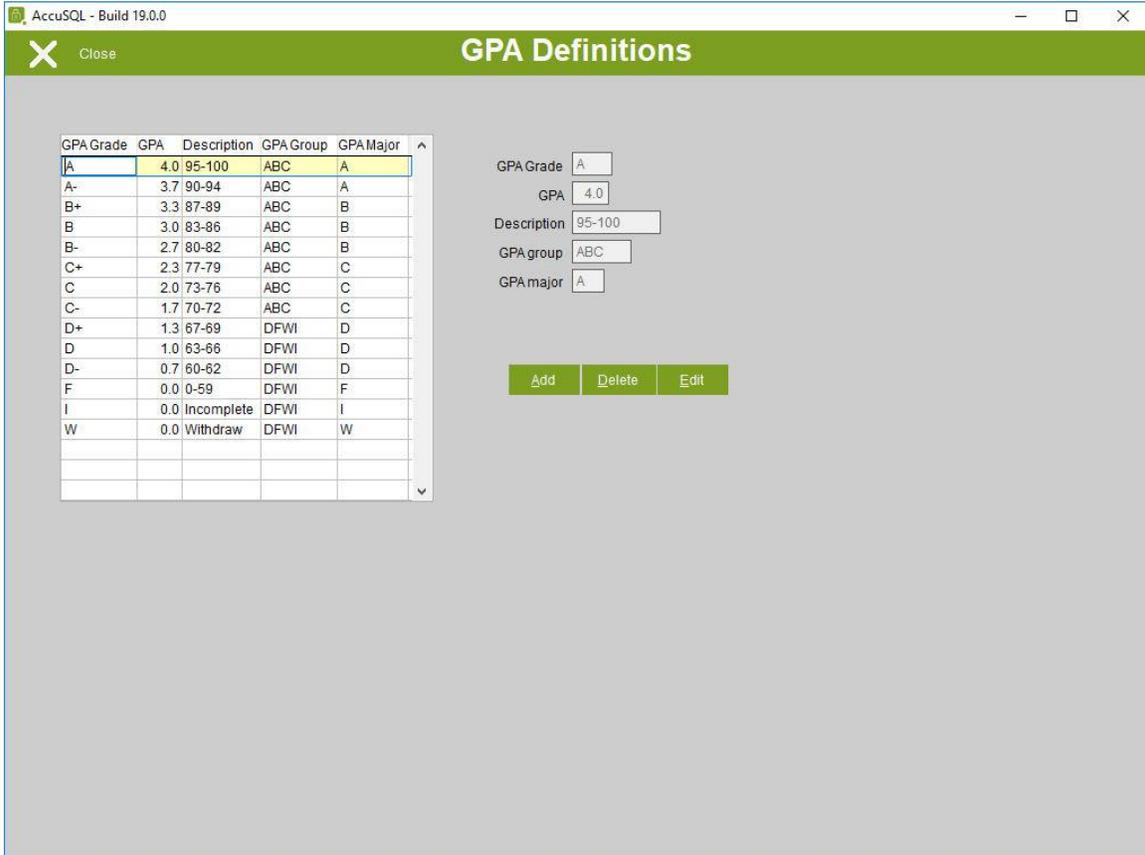
 **Tip:** If you have the grades in electronic format, you can import them using the AccuSQL/AccuTrack Import Wizard.

To correct a grade, clear the “Only show students without grades” box, select the student and re-enter the grade. The new grade will replace the older one.

GPA DEFINITIONS

Purpose: Change the student’s GPA definitions for program assessment grades.

Access: From System Administration, click on Program Assessment >> GPA Definitions.



Note: The GPA Definitions are prefilled for you and should typically be left alone since they are used programmatically to generate different reports and report pivot tables.

Note: Since all options are setup in the Program Assessment screen itself, Program Assessment does not contain Setup options.

COMMUNICATIONS SCREEN

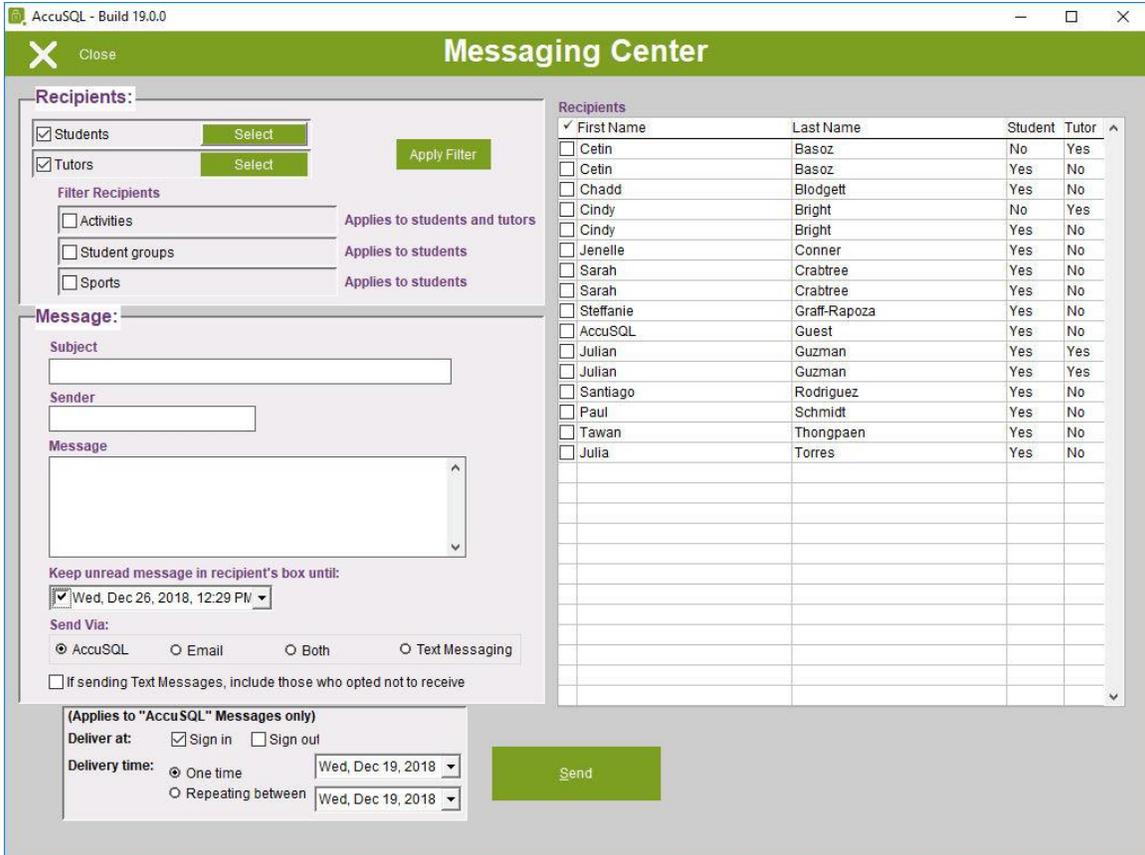
When you click on Communications from the Main Menu, you will see the following options:

- Messaging Center: Use to enter send messages to students, and/or using various delivery methods.
- Student Contacts: A quick method for entering notes for students.

MESSAGING CENTER

Purpose: Leave messages for students and/or tutors.

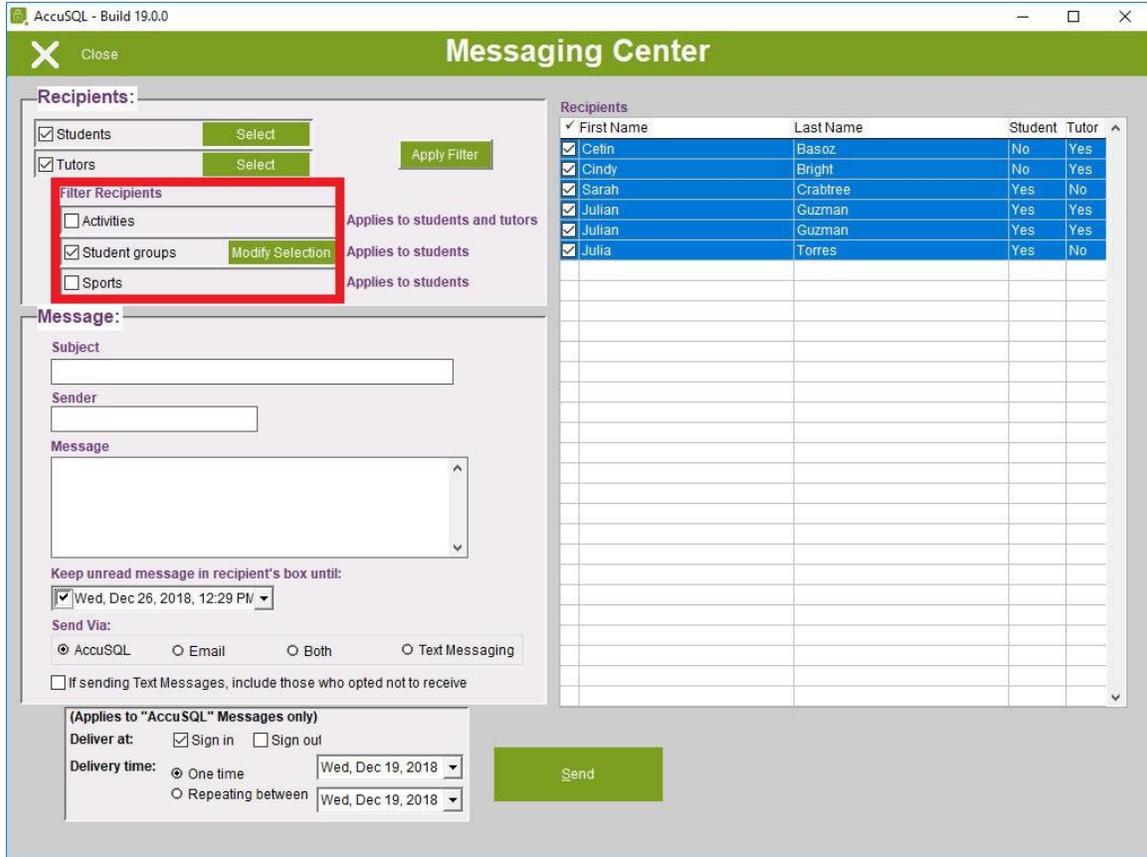
Access: From System Administration, click on Communications >> Messaging Center.



In the top left **Recipients** section of the screen, there are several selection control filters. By default, the Students and Tutors checkboxes are selected. If you leave these boxes checked and then click the Apply Filter button, every student and tutor in the database would be selected in the Recipients box. You want to be careful with this one!

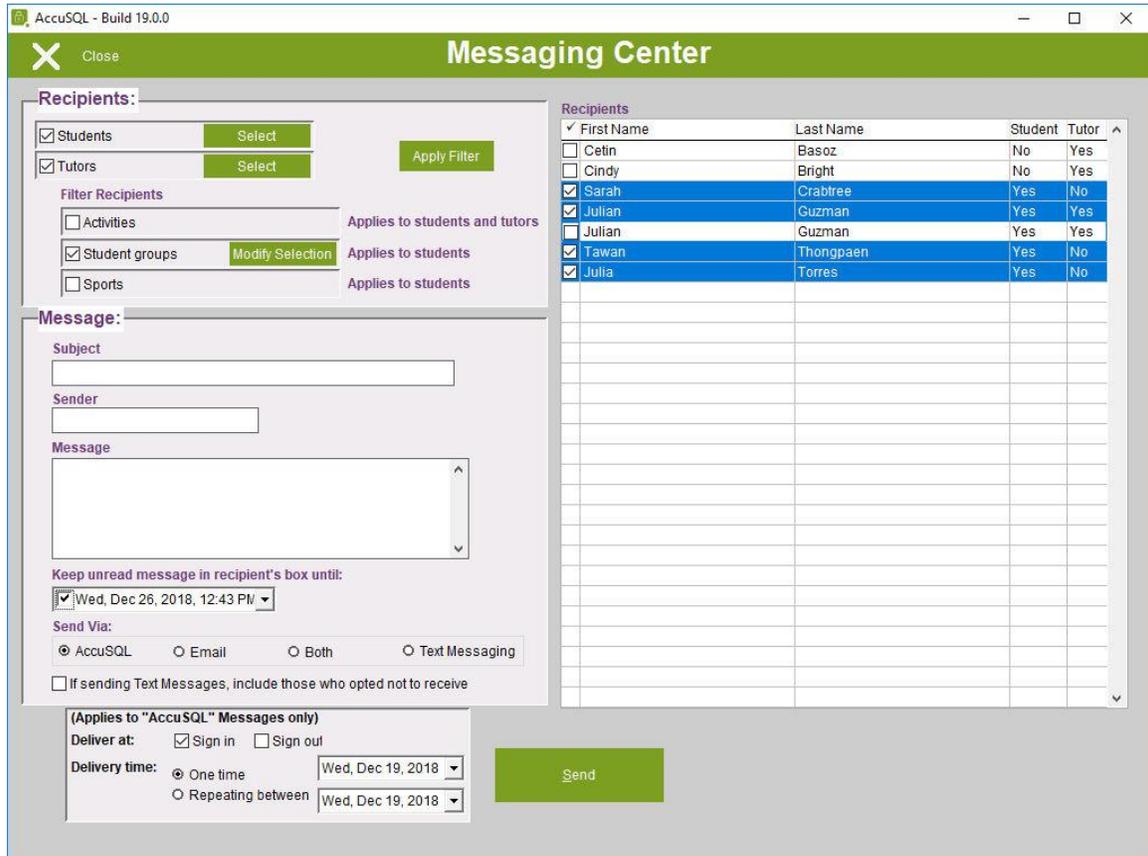
If you click on either the Students or Tutors checkboxes, you can click the Select buttons to select specific students and/or tutors as recipients. Simply select the ones you want, then click Close in the pop-up filter box, then click Apply Filter. The students and/or tutors you selected will be added entered into the Recipients list.

You can select recipients who are registered for a particular class or classes using the Activities filter. You can also filter on any Student Groups you have added, and/or any sports you have defined that have students assigned to them.



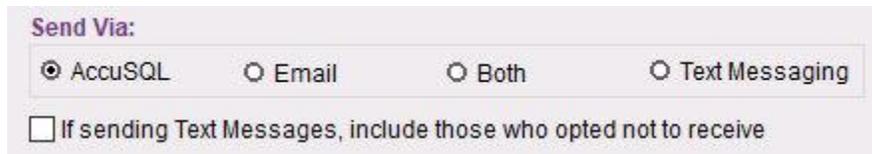
Tip: Remember you can combine filters too. For example, you could send a message to students who are registered for a particular set of classes who are in an At Risk Student Group and are on your Tennis team.

Based on your filters, after you click Apply Filter, the list box on the right, labeled “Recipients” shows users you select to receive your message. The users are all selected automatically in the Recipients list, but if you want you can deselect particular students or tutors directly in the list before you send the message.



SENDING MESSAGES

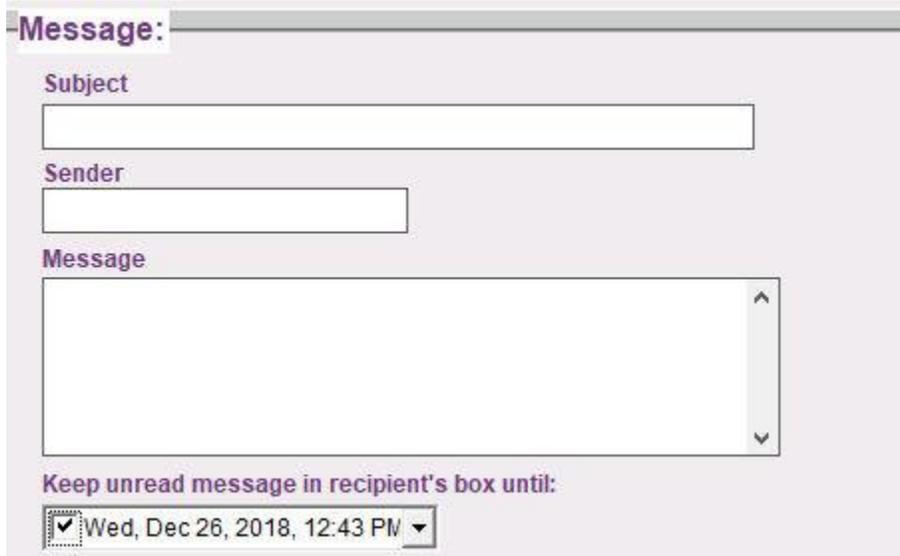
AccuSQL/AccuTrack can send the messages via the software itself, via Email, both AccuSQL/AccuTrack and Email, or Text Messaging. Send the message by checking the appropriate radio button. If you are sending a text message, you can include students who have “do not send text messages” selected on their student record by clicking the “If sending Text Messages, include those who opted not to receive” checkbox.



Now enter the subject of the message. Also enter the name of the sender. These fields are specifically helpful if you send the message via email. Type your message in the Message box.

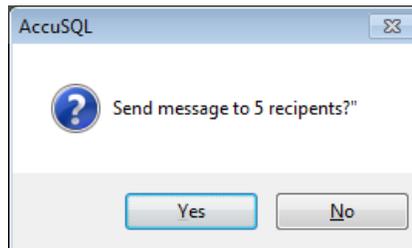
Note: For text messaging, only use the Message field is used. You need not enter a Subject or Sender.

If you are sending the message via AccuSQL/AccuTrack, use the date box under the *Message* edit box to enter the expiration date of the message. The default is one week from the date that your message is entered. If the recipient still did not read your message by the expiration date, the message will be deleted automatically. This function is useful for removing messages that are no longer relevant after a certain date.

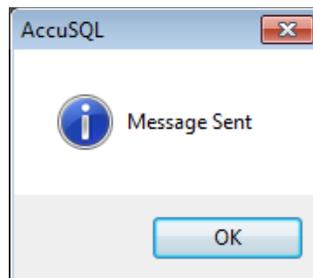


The screenshot shows a window titled "Message:". It contains three input fields: "Subject", "Sender", and "Message". Below these fields is a dropdown menu labeled "Keep unread message in recipient's box until:" with the selected date and time "Wed, Dec 26, 2018, 12:43 PM".

When you are ready to send the message, click on the "Send" button. If you selected more than one recipient, you will see a confirmation message:



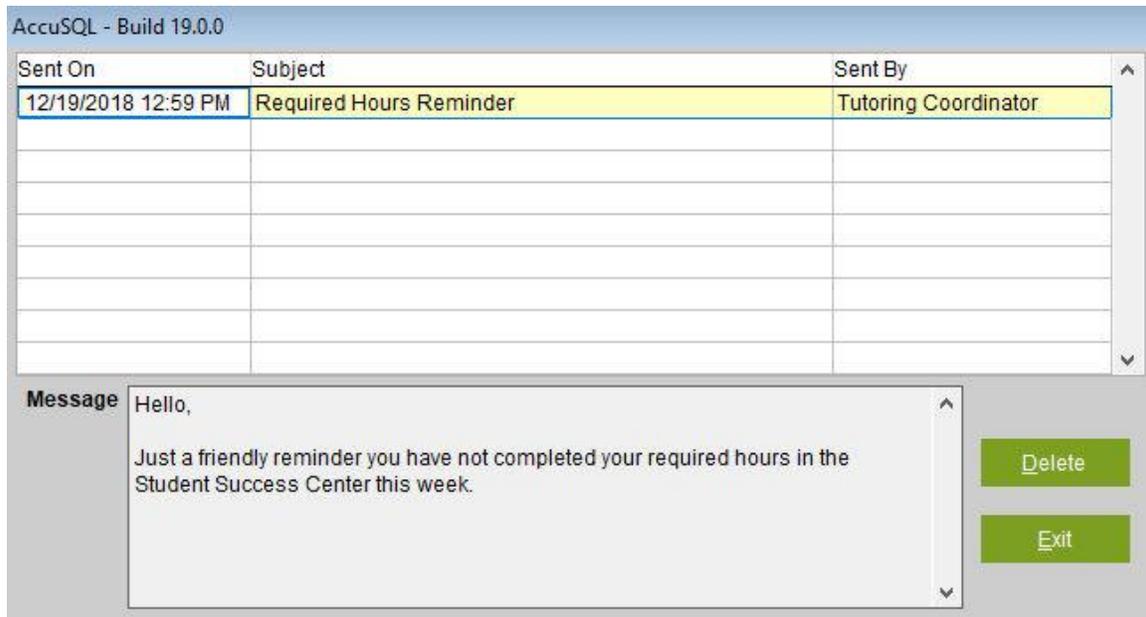
Click on "Yes" to send the message. You will see a confirmation:



Note: You can enable the Messaging Center for students too by enabling the Messaging Center button on the main sign in screen. Students, however, will not have access to text messaging and you can further set a restriction where students can message tutors only and not other students.

RECEIVING MESSAGES

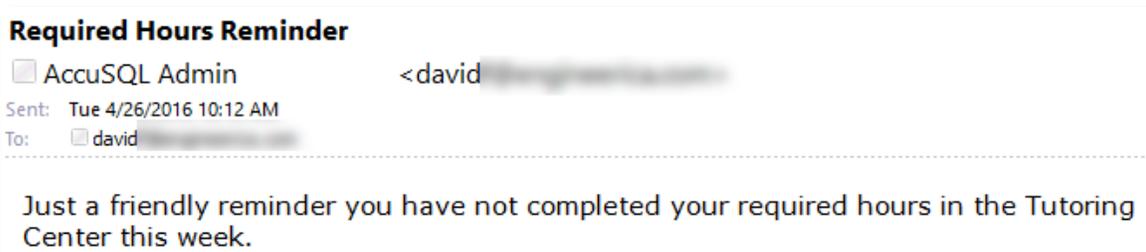
If you chose to send the message via AccuSQL/AccuTrack, when the recipient of the message signs in or out, the message delivery box will appear:



The "You have mail" screen lists all the messages you have received, the date and time the message was sent, the subject of the message, and its sender. When you select one of the messages in this list, the Message box will show the message itself.

The user has the option of deleting this message, or keeping as a reminder at the next sign in or sign out time.

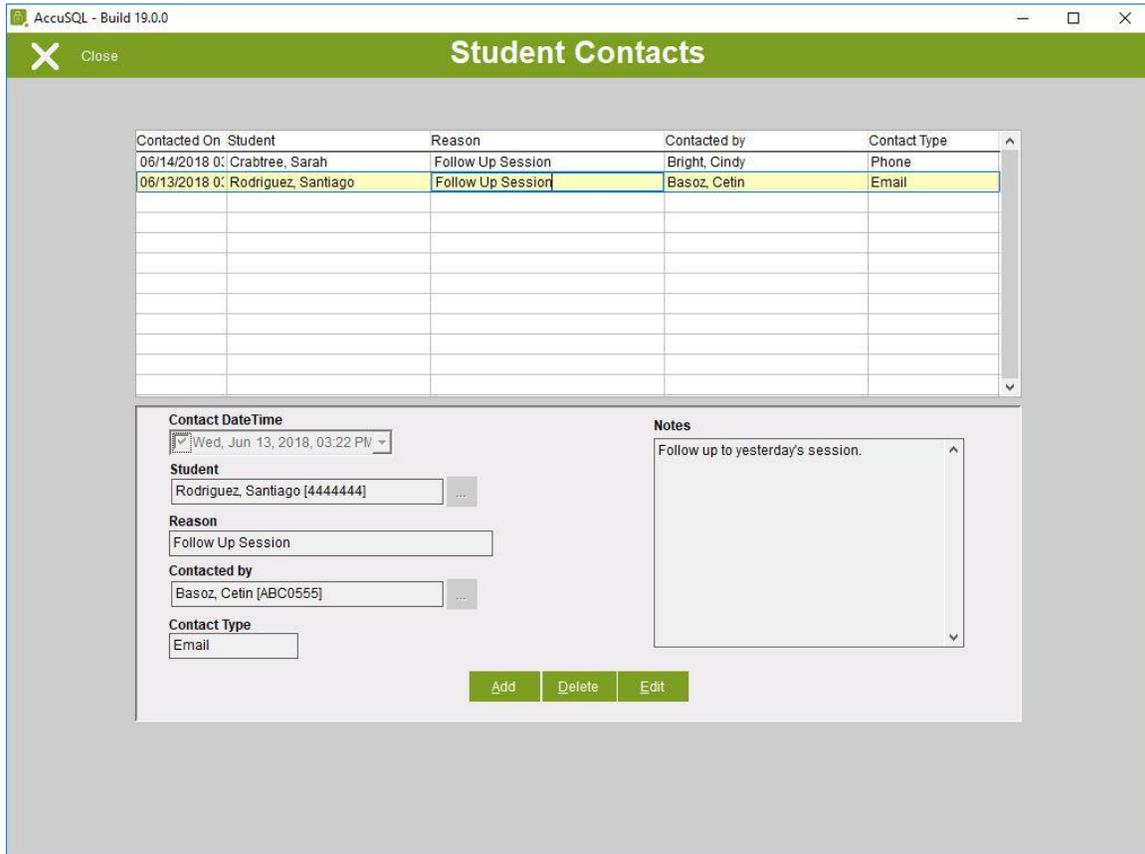
If you chose Email as the delivery method, it will be delivered to the recipients' email inbox, or if you chose text, then the recipients will receive a text message.



STUDENT CONTACTS

Purpose: Track your contact with students.

Access: From System Administration, click on Communications >> Student Contacts.



This module allows you to track contacts with visitors. For example, you can log phone calls, emails, and personal interactions in this screen. The available fields to register your contacts are:

- **Contact Date Time:** Date and time when student was contacted.
- **Student:** Student's name.
- **Reason:** The reason for the contact.
- **Contacted by:** Who contacted the student.
- **Contact type:** The type of contact. For example: phone, e-mail, personal interaction, etc.
- **Notes:** Here, you can enter comments, or the description of the subject of the contact, or any notes you like.

To add a new contact, click on the "Add" button. To edit a contact, select one from the list box located at the top of the screen by double-clicking on it. To record your selection, click on "Save".

COMMUNICATIONS SETUP OPTIONS

To access the Communications Setup options, click Communications in System Administration, then the Setup tab. The Email Settings Options screen should be selected by default. If not, click on it on the left of the Options screen.

Here are the Control Panel options for Users:

- Email Settings Options – Used to setup the mail server information that will be used to send emails via AccuSQL/AccuTrack.
- Text Messaging Configuration – Used to setup the text messaging information that will be used to send text messages in AccuSQL/AccuTrack.

EMAIL SETTINGS OPTIONS

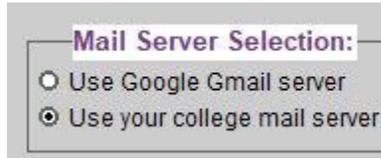
To access Email Settings Options , click Communications in System Administration, then the Setup tab. The Communications Setup Options screen should be selected by default. If not, click on it on the left of the Options screen.

AccuSQL/AccuTrack utilizes email in several ways:

- To send email notifications to tutors or students when an appointment is set or cancelled.
- To remind students about their appointments via email.
- To send email messages to students via the Messaging Center.
- To email Session Logs to the student's instructor.
- To email most AccuSQL/AccuTrack reports, either manually or via an automated schedule.
- To send late media reminder emails.

For the above functions to work, you must enter your email server's settings in this page:

MAIL SERVER SELECTION



A dialog box titled "Mail Server Selection:" with two radio button options. The first option is "Use Google Gmail server" and the second option is "Use your college mail server", which is selected with a filled radio button.

If you want to use a Gmail server, select that radio button. If you prefer to use your own mail server, select Use your college mail server.

Mail server



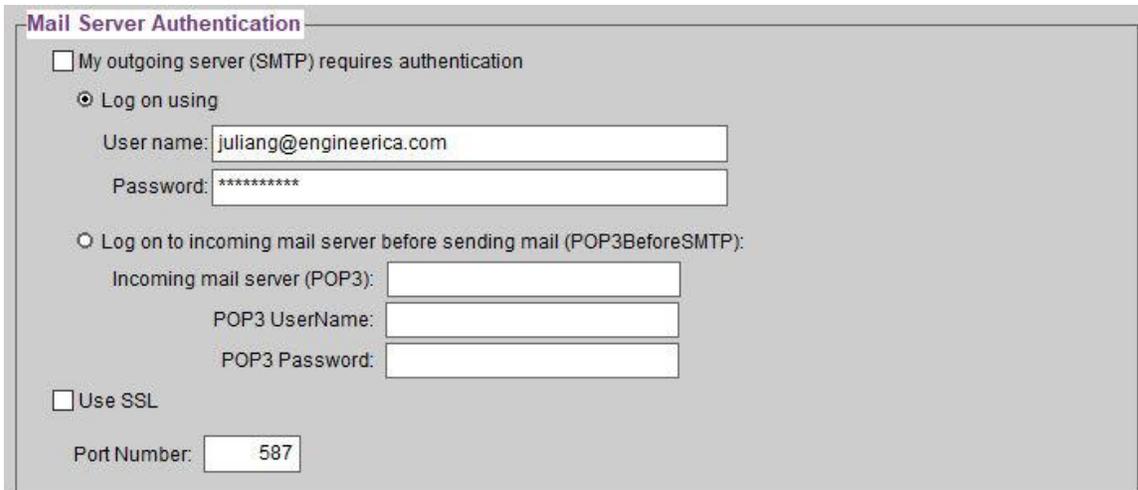
A form titled "Mail Server:" with three input fields. The first field is labeled "Outgoing mail server (SMTP)" and contains the text "mail.server271.com". The second field is labeled "Sender name:" and contains the text "Student Learning Center". The third field is labeled "Sender E-mail Address:" and contains the text "juliang@engineerica.com".

Outgoing mail server (SMTP): Use the "Mail server" entry box to type in the name of your outgoing Simple Mail Transfer Protocol (SMTP) mail server. It is important that you use the correct name or the email operation will fail. If you don't know the name, contact your System Administrator for help, or check the setup of your current email client for the correct name. If you are using a Gmail server, this information is already filled in for you.

Sender Name: Use this box to enter the sender's name as it will appear in the outgoing email messages.

Sender E-Mail: Use this entry box to enter the sender's email address as it will appear in the outgoing email message. This email address will be used if the recipient hits the "Reply" button or if the message bounces back and must be a valid email address.

Mail Server Authentication



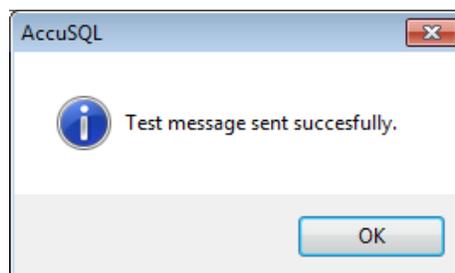
If your mail server requires authentication, you can use the options on this screen to set it up:

1. My outgoing server (SMTP) requires authentication: Check this box if your email server requires authentication. AccuSQL/AccuTrack supports two methods of authentication:
 - a. Log on using: Provide the user’s name and password to use for the log in.
 - b. Log on to incoming mail server before sending mail: This option is known as “POP before SMTP). If your server requires it, enter the POP3 user name and address. Note that AccuSQL/AccuTrack will not actually download any email messages on the POP3 server.

2. Port Number: The default is 25, but you can change it if needed. You can also use secure socket layer (SSL) if your mail server is setup what way. Note: If you are using a Gmail server, the SSL and port will automatically be entered for you.

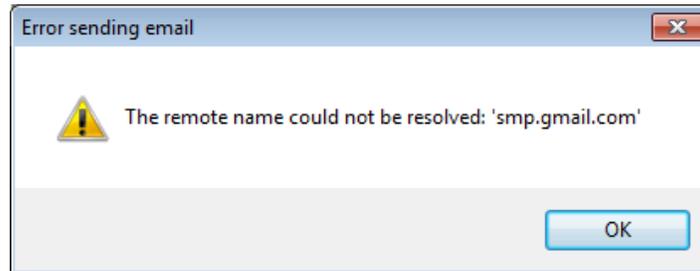
TESTING EMAIL SETTINGS

Click the Test Email Settings after you have entered the email server configuration to send a test email message. The message will be delivered to the email you specified in the Sender Email Address field. If configure properly, you will get this message after you click Test Email Settings.



If any problems occur, you will see an Error sending mail message. The message may change depending on what problem is encountered:

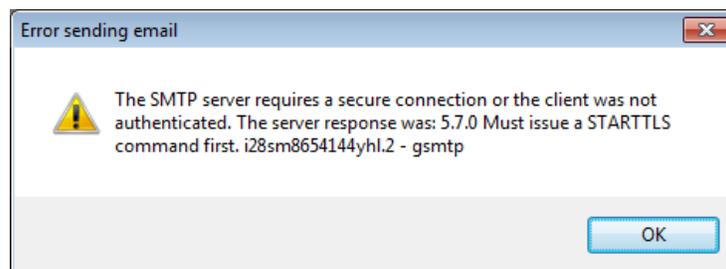
Email server entered incorrectly:



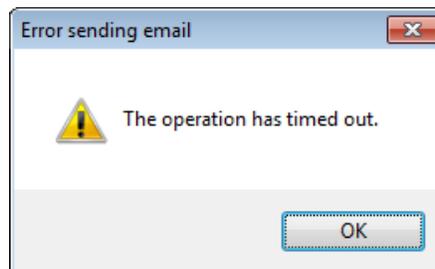
Wrong user name and password entered:



SSL required but not selected:



SSL selected but wrong port number specified:



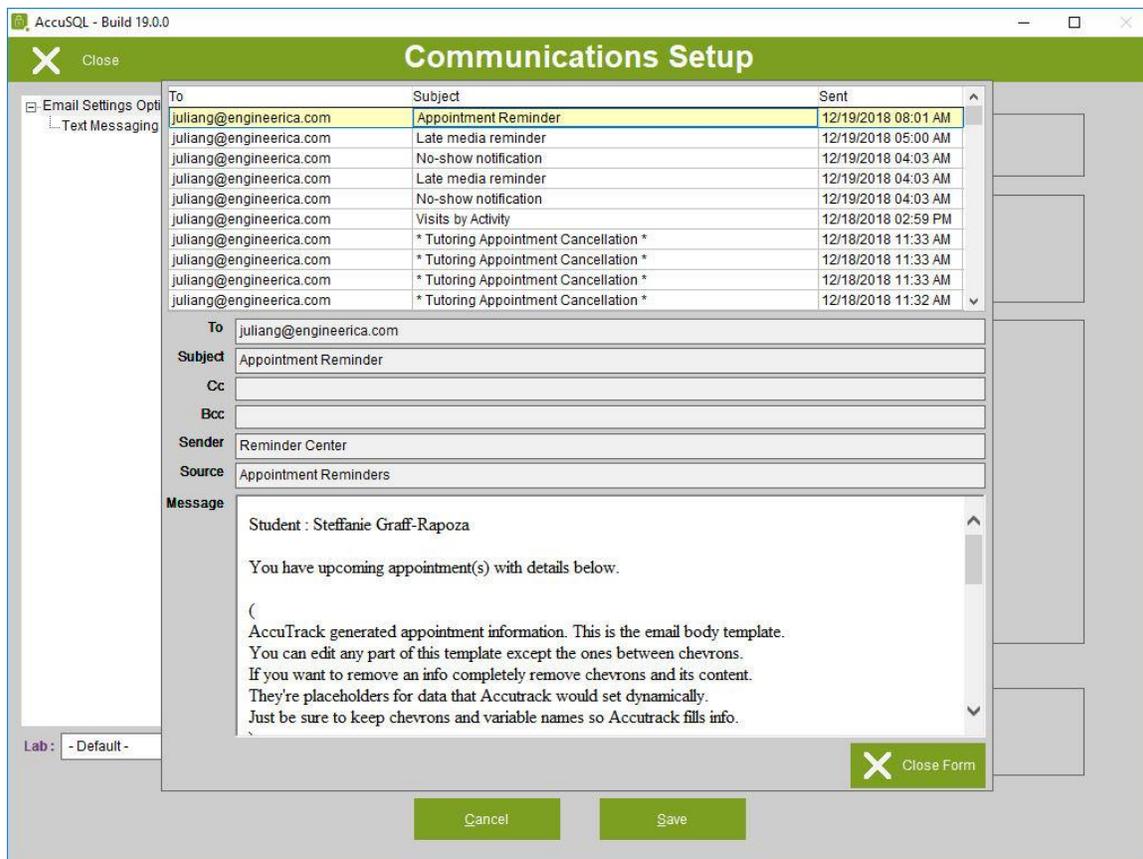
Use any error messages to troubleshoot your email settings. Depending on how your mail server is configured, you may need to get an IT person to unblock a port or adjust your firewall settings to allow for the outgoing mail.

Note: If you use a Gmail server, remember you must have a Gmail account available. If you do not have a Gmail account, you can sign up for one free at Google.com.

EMAIL LOG



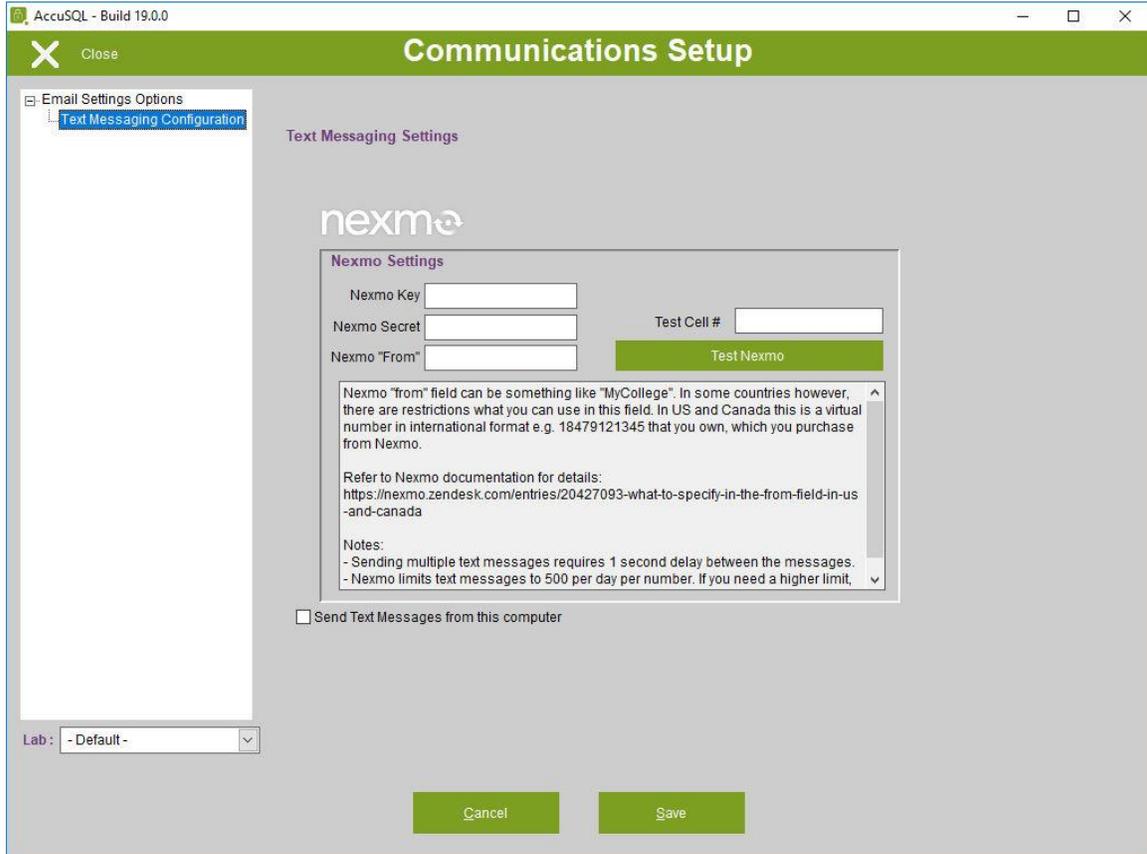
If you want AccuSQL/AccuTrack to log all outgoing email, check this box. Use the buttons to view or delete the log. If you are not getting emails, then you can check the log to further analyze what may be going wrong. All successful and unsuccessful email will be written to the log.



Tech Tip: More detailed logs are contained in the AutomatedLogs and AutomatedTasks tables.

TEXT MESSAGING CONFIGURATION

To access Text Messaging Options , click Communications in System Administration, then the Setup tab. On the left side of the screen, click Text Messaging Configuration.



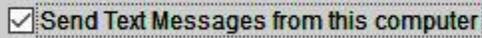
AccuSQL/AccuTrack can utilize text messaging in several ways:

- To send appointment reminders texts to students.
- To send text messages to students and tutors via the Messaging Center.
- To send text messages to students from the intake system or the activity waiting list.

Use this screen to setup the service you are using to deliver text messages to your students and tutors.

Due to its, reliability, affordability, and secure transmission protocol, we Nexmo services. When you create an account with this provider, you will be given the access information you will need to enter into the SMS Configuration screen. To find out more you can visit www.nexmo.com.

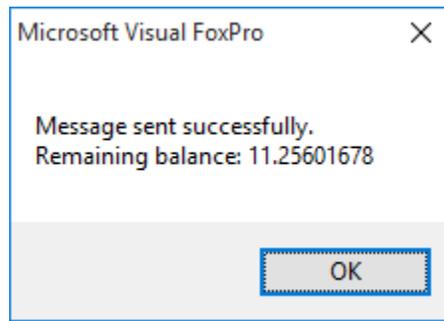
If you intend to enable text messaging right away, select the Send Text Messages from this computer to enable the messaging and click Save.



TESTING NEXMO

After you enter the Nexmo Key, Nexmo Secret, and Nexmo From information (provided by Nexmo after you have created a valid account) you can enter your own cell number (make sure to add a 1 in front of it) to test the messaging.

After you click Test Nexmo, you should see a pop-up message indicating the message was sent and you should also get a test message on your phone for the number you entered.



If you get a different message, check your Nexmo settings and retry. You may also want to check with IT to make sure there is no security or firewall policy in place that will prevent the outbound SMS traffic.

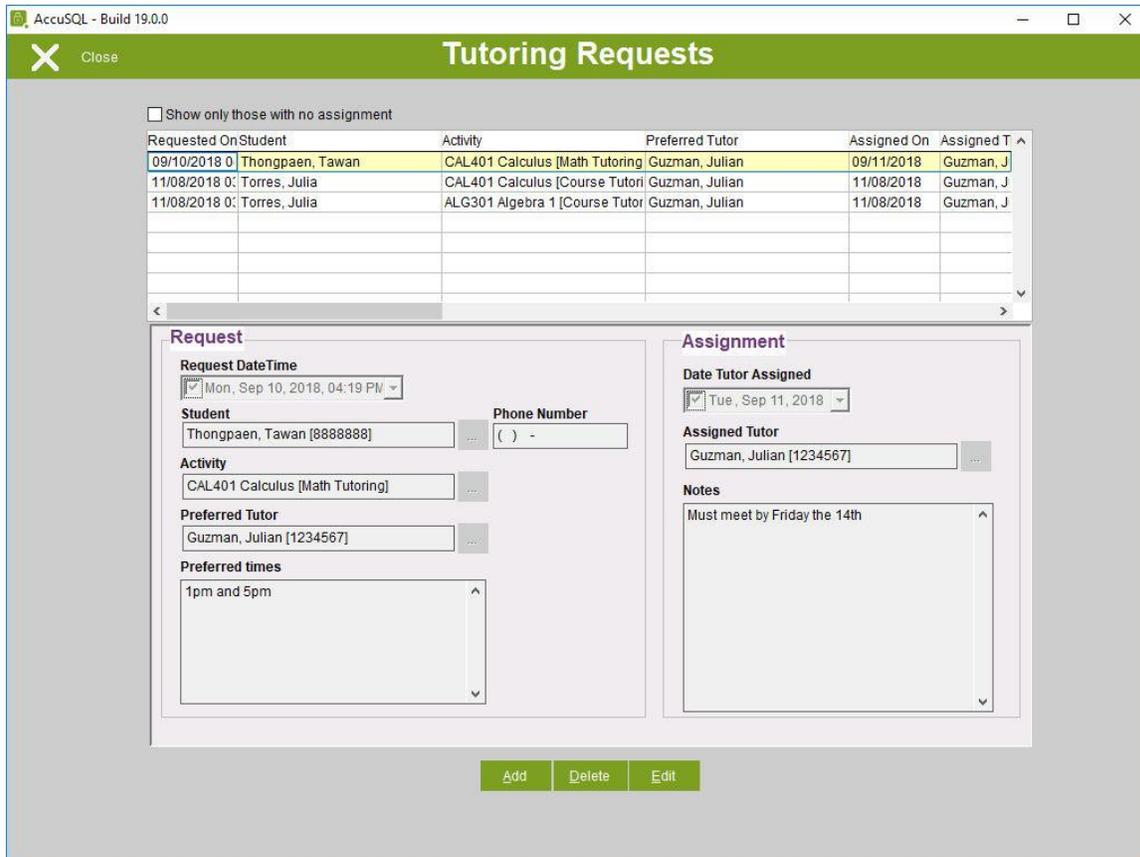
TUTORING REQUESTS SCREEN

When you click on Tutoring Requests from the Main Menu, you will see the following options:

- Tutoring Requests: Use to track service requests and assignments.

TUTORING REQUESTS

Access: From System Administration, click on Tutoring Requests >> Tutoring Requests.



If your center requires requests for tutoring and tracks these requests, you can use this screen to record the tutoring requests and assignments. Using Tutoring Requests, the student can select their preferred tutor for the session, but it is ultimately up to the person(s) controlling the Tutoring Requests to assign the tutor for the session.

Once a request has been assigned (thus approved) by the staff member(s) via the Tutoring Requests screen, then the student will be able to schedule the appointment for the date/time indicated.

Using Tutoring Requests gives you ultimate control over student appointments, however it has some limitations. The student is required to use some means of communication (email/phone/web form) to contact you to request the appointment (outside of AccuSQL/AccuTrack) and then that information is entered into the Tutoring Requests screen in AccuSQL/AccuTrack. Once that is done, the tutoring request also needs to be approved in AccuSQL/AccuTrack, also using the Tutoring Requests screen. Only then will the student have the capacity to make an appointment for the date/time specified via AccuSQL/AccuTrack, or Web Gateway.

Note: Tutoring requests are either enabled or disabled globally via the Set Appointment >> Setup >> Restrictions Options. If enabled, then all appointments for students must be assigned via the Tutoring

Requests screen. You cannot have some students that are approved via Tutoring Requests to make appointments and some that are not.

ENTERING A REQUEST

- Click on the “Add” button.
- Enter the requests date and time. This field is automatically filled with the current date and time, but you can enter change that to whatever date and time you wish.
- Select the student: You must select the student that made the tutoring request. Click the ellipses button  to see a list of students and select one.
- Select the Activity (class): You must select the Activity or class the student requested. Click the ellipses button  to see a list of activities (classes) and select one.
- (Optional) Select the student’s preferred tutor: To indicate the requested tutor, click the ellipses button  to see a list of tutors for the selected class and then select one.
- (Optional) Enter the preferred meetings times.
- Click Save to record the new request.

ENTERING ASSIGNMENTS

You can also register the tutoring assignments in the Tutoring Requests screen by following these steps:

- Select the tutoring request from the list at the top of the screen and click “Edit”.
- Enter the date the tutor assignment is made.
- Select the assigned tutor.
- (Optional) Enter comments on the assignment in the *Notes* box.
- Click Save.

 **Tip:** To only show requests with no assignment, click the “**Show only those with no assignment**” check box.

TUTORING REQUESTS SETUP OPTIONS

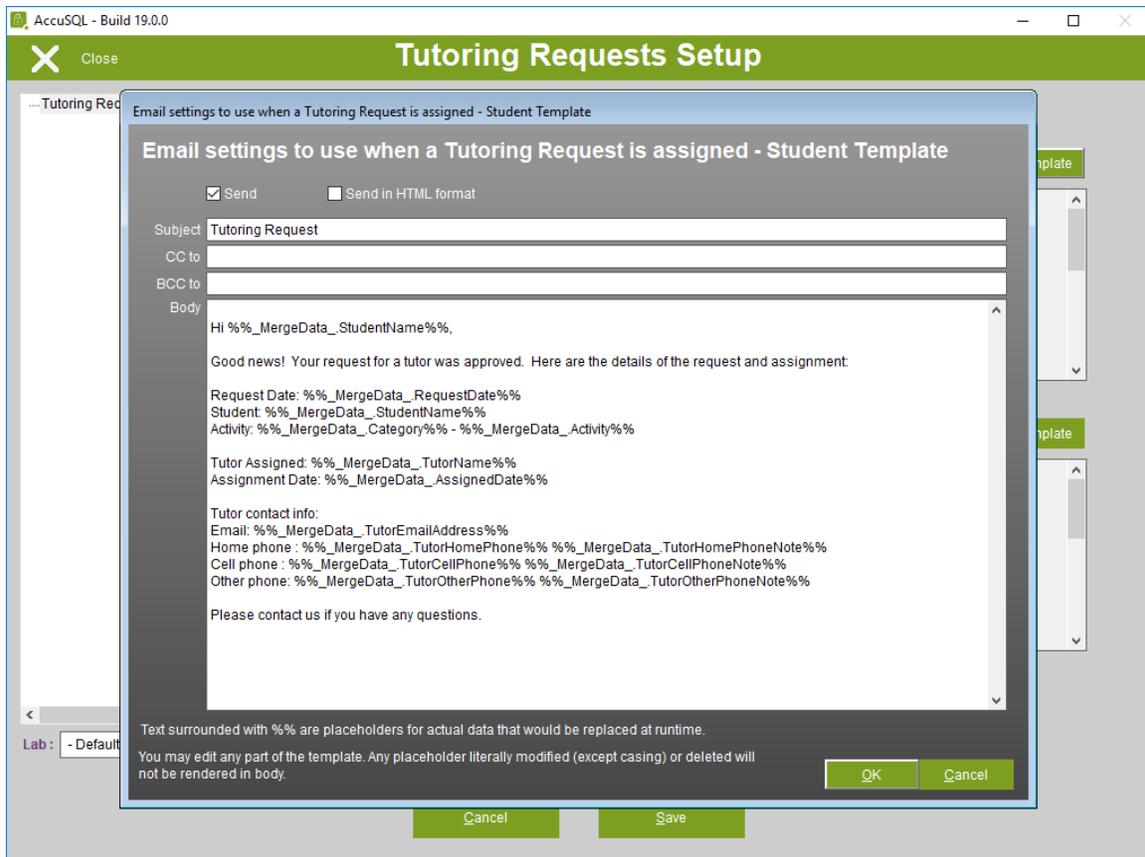
To access the Tutoring Request Setup options, click Tutoring Requests in System Administration, then the Setup tab. The Tutoring Request Email Template screen should be selected by default. If not, click on it on the left of the Options screen.

TUTORING REQUEST EMAIL TEMPLATE

Use this screen to edit the emails that will be sent when a tutoring request has been approved by and administrator. This option allows students to schedule appointments, but then they must be approved by a system administrator before they become *official* appointments.

The screenshot shows the 'Tutoring Requests Setup' window in AccuSQL - Build 19.0.0. The window has a green header with the title 'Tutoring Requests Setup' and a 'Close' button. On the left, there is a sidebar with a 'Tutoring Request Email Template' link. The main content area is divided into two sections: 'Student' and 'Tutor'. Each section has a 'Send' checkbox (checked), a 'Send in HTML format' checkbox (unchecked), and an 'Edit Template' button. Below these are text areas for email templates. The 'Student' template includes placeholders for subject, CC, BCC, and body, and a sample body text: 'Hi %%_MergeData_StudentName%%, Good news! Your request for a tutor was approved. Here are the details of the request and assignment.' The 'Tutor' template is similar but uses 'TutorName' in the salutation and body text. At the bottom left, there is a 'Lab' dropdown menu set to '- Default -'. At the bottom center, there are 'Cancel' and 'Save' buttons.

There are emails that are sent to the student and also the tutor when the Tutoring Request has been approved using the Tutoring Requests screen. You can edit these emails by clicking the Edit Template button for either the Student Email or the Tutor email. When you click Edit Template, you will be able change the text of the email who it is copied to (it goes to the student or tutor automatically). After you are done, click OK to save your changes.



Note: The templates use merge fields that enter the information from the Tutoring Request into the email. Merge fields look like this %%MergeData_FieldName%% and should be typically be left alone.

SEMINARS SCREEN

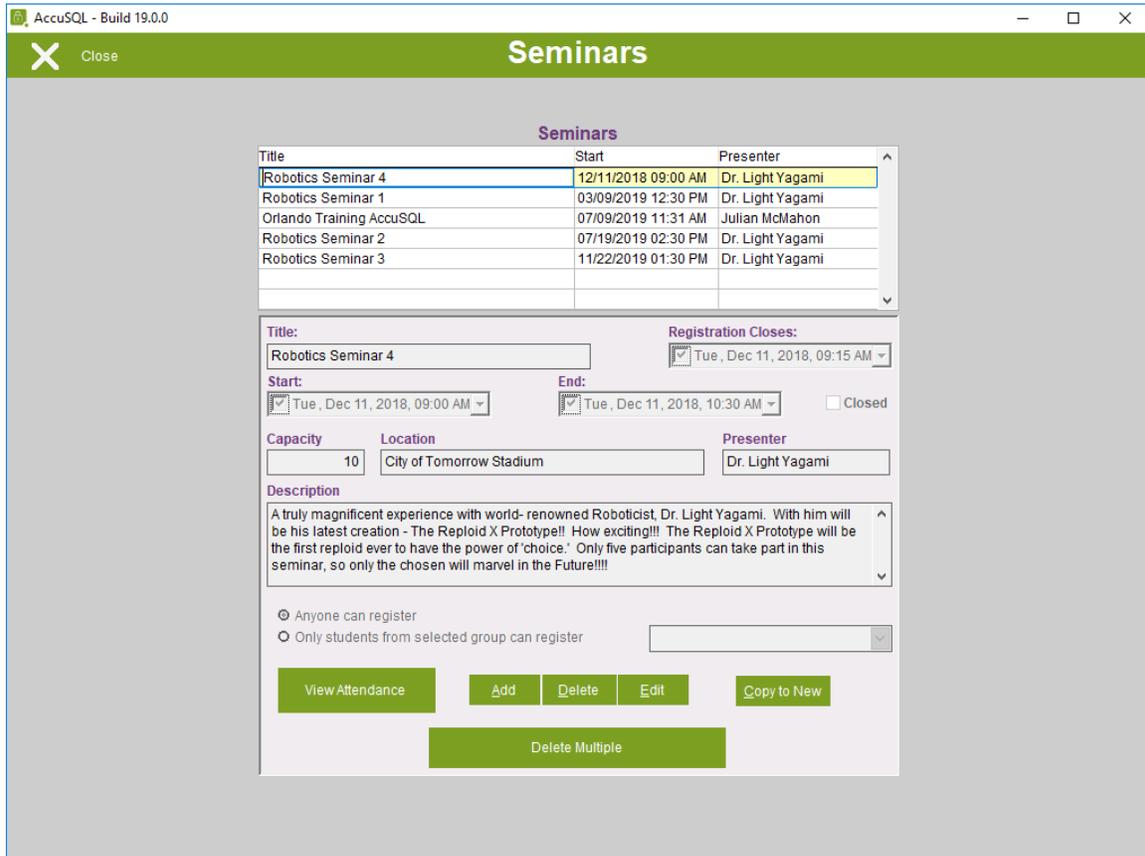
When you click on Seminars from the Main Menu, you will see the following options:

- Seminars: Use to create special events in your center. Students can then register for those events, indicating they plan to attend them.
- Seminars Status: Allows you to see who is currently registered for and events and the total seats remaining. You can also manually register student for events in this screen.

SEMINARS

Purpose: To add a new seminar or modify the information of current seminars.

Access: From System Administration, click on Seminars >> Seminars.



 **Tip:** You can change the term “seminar” to “workshop” via the terminology setup screen.

Adding a Seminar

To **add** a new seminar, simply click on the "Add" button, and then fill in the seminar's data:

- **Title:** Use to enter the title of this seminar.
- **Registration closes:** Enter the date the registration for the seminar closes.
- **Start:** Enter the date and time the seminar starts. This should be after the registration closes.
- **End:** Enter the date and time the seminar ends. This should be after the registration closes and also after the Start time.
- **Closed:** Check this box when registration for this seminar closes.
- **Capacity:** Enter the number of attendees the seminar is open for.
- **Location:** Enter the location where the seminar will take place.
- **Presenter:** Enter the name of the presenter of this seminar.

- **Description:** Use this box to enter a description of the seminar.
- **Anyone can register:** Select this value if you want the seminar to be available for all students.
- **Only students from selected groups can register:** Select this value if you only want students that are members of one or more student groups to be able to register for the seminar.

After filling those text boxes, click on the "Save" button to save the new seminar.

Editing a Seminar

To **edit** a seminar, first highlight the title of the seminar in the list. To edit the record, click on the "Edit" button. The seminar's info will be copied to the text boxes. Make your changes there and then click on the "Save" button to keep the changes, or click on the "Cancel" button to keep the data as is.

 **Tip:** You can also double click on a seminar's title name to edit its data.

Closing a Seminar

AccuSQL/AccuTrack will close registration to the seminar when any of these events occur:

1. When the number of registered students reaches the seminar's capacity.
2. When the date and time specified in the "Registration Closes" box arrives.
3. When the seminar's start date passes.
4. When admin checks the "Closed" box.

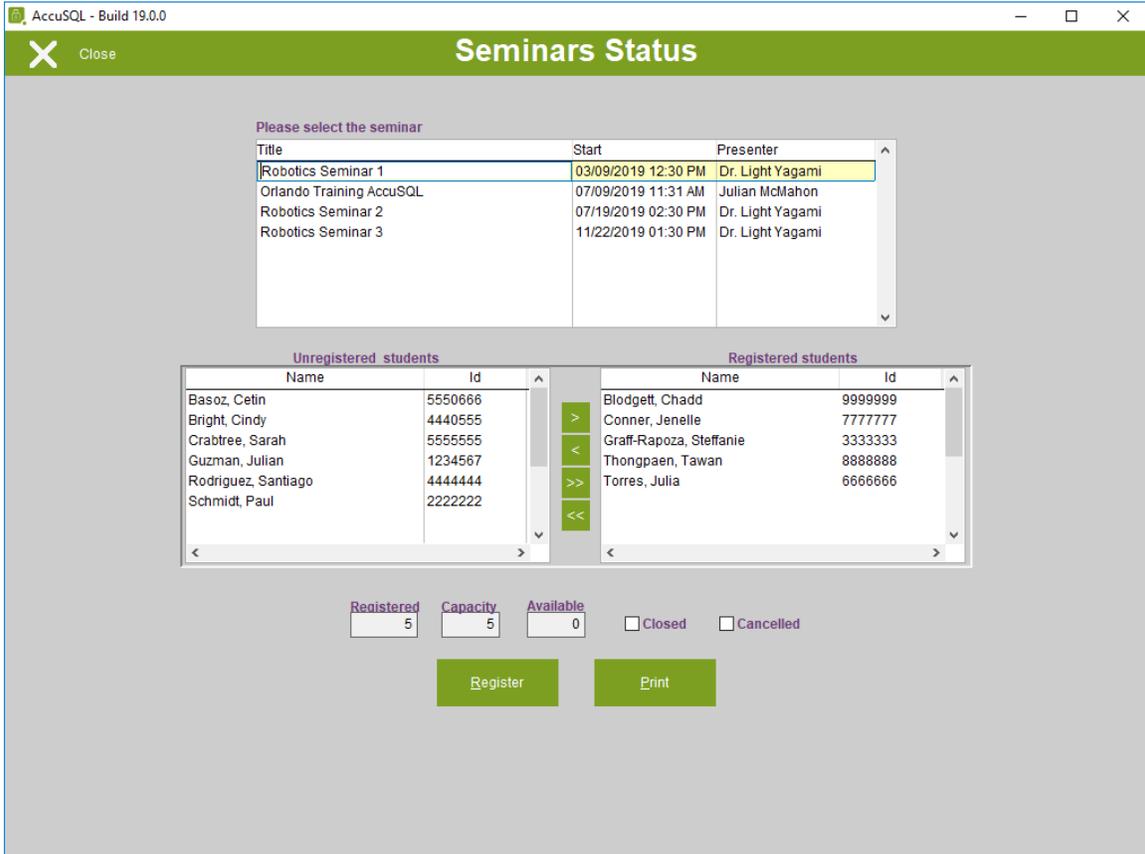
Deleting a Seminar

To **delete** a seminar, first highlight the name, and then click on "Delete". You will see a confirmation message. Answer "Yes" to delete the seminar.

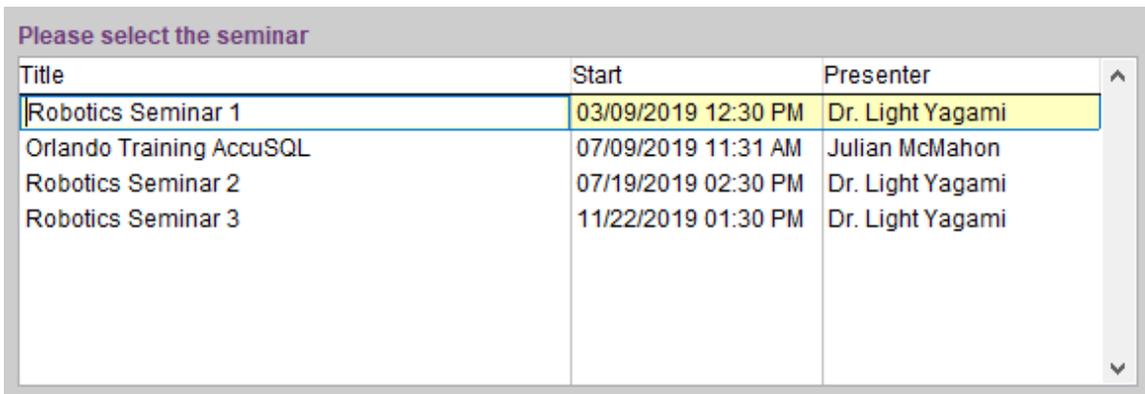
SEMINARS STATUS

Purpose: To track the status of seminars and edit registration.

Access: From System Administration, click on Seminars>>Seminars Status.

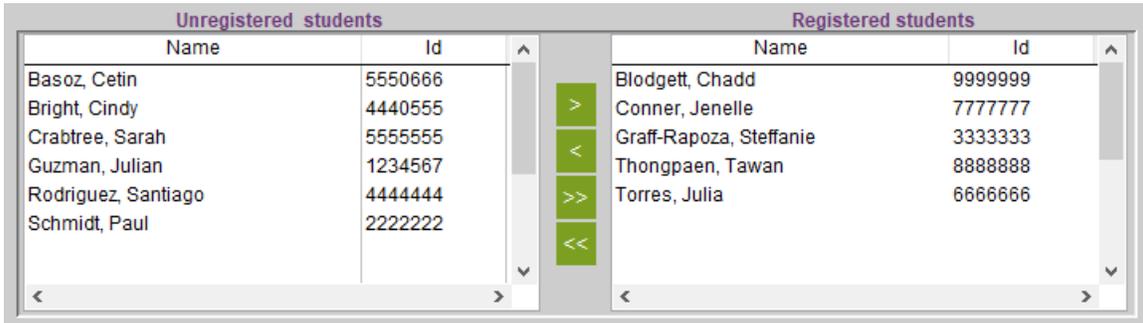


Use the “Please select the seminar” area to select the seminar in the grid you want to access. You will only see seminars that have not taken place yet in this grid and not seminars that have already occurred.



The *Selection List Boxes* control above shows students who are either unregistered or registered for the selected seminar. To edit the registration info, use the *Selection List Boxes* control to move people

between the *Unregistered* list box on the left and the *Registered* list box on the right. Click the Register button to save your changes.



The bottom portion of the screen shows the seminar's availability information: number of registered students, seminar's capacity, and number of available seats. You can also either close or cancel the seminar by checking either of those boxes. Of course, be careful with these options if students have already registered for the seminar.

Registered	Capacity	Available	<input type="checkbox"/> Closed	<input type="checkbox"/> Cancelled
5	5	0		

If you would like to get a quick report for the seminar registrations, click the "Print" button.

Closing a seminar

You can close the registration to any seminar just by clicking the "Closed" check box. When you close a seminar, AccuSQL/AccuTrack will not allow you, the user, or any other student to register for the selected seminar.

Canceling a seminar

Sometimes, a seminar needs to be cancelled for some reason, e.g., the presenter is not going to be there, or the quantity of registered students is not what was required. You can cancel any seminar just by clicking the "Cancelled" check box.

Note: Seminars do not have any Setup Options since all setup is handled through Seminars >> Seminar Status button.

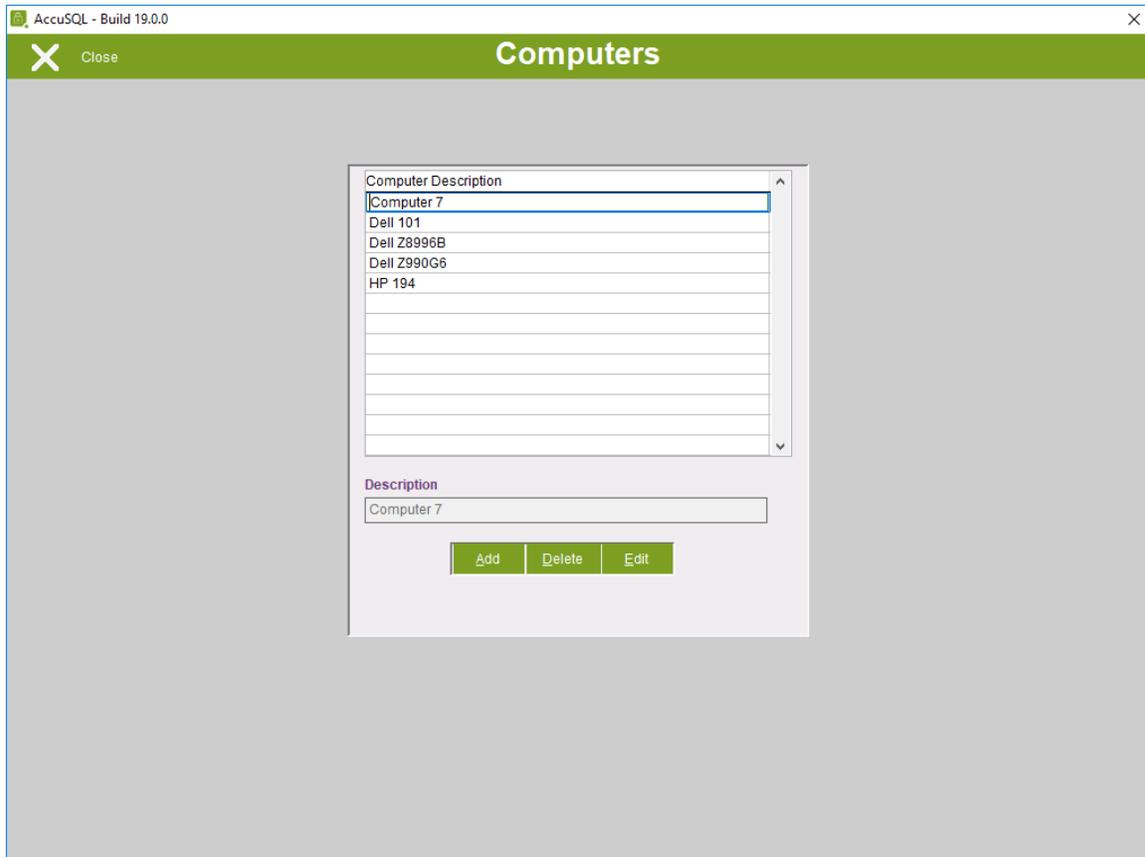
COMPUTER RESERVATIONS SCREEN

When you click on Computer Reservations from the Main Menu, you will see the following options:

- Computers: Use to create computer names that are then used for you to reserve time for students.
- Computer Reservations: Allows you to see allocate computer use to students for the computers you have created.

COMPUTERS

Access: From System Administration, click on Computer Reservations >> Computers.

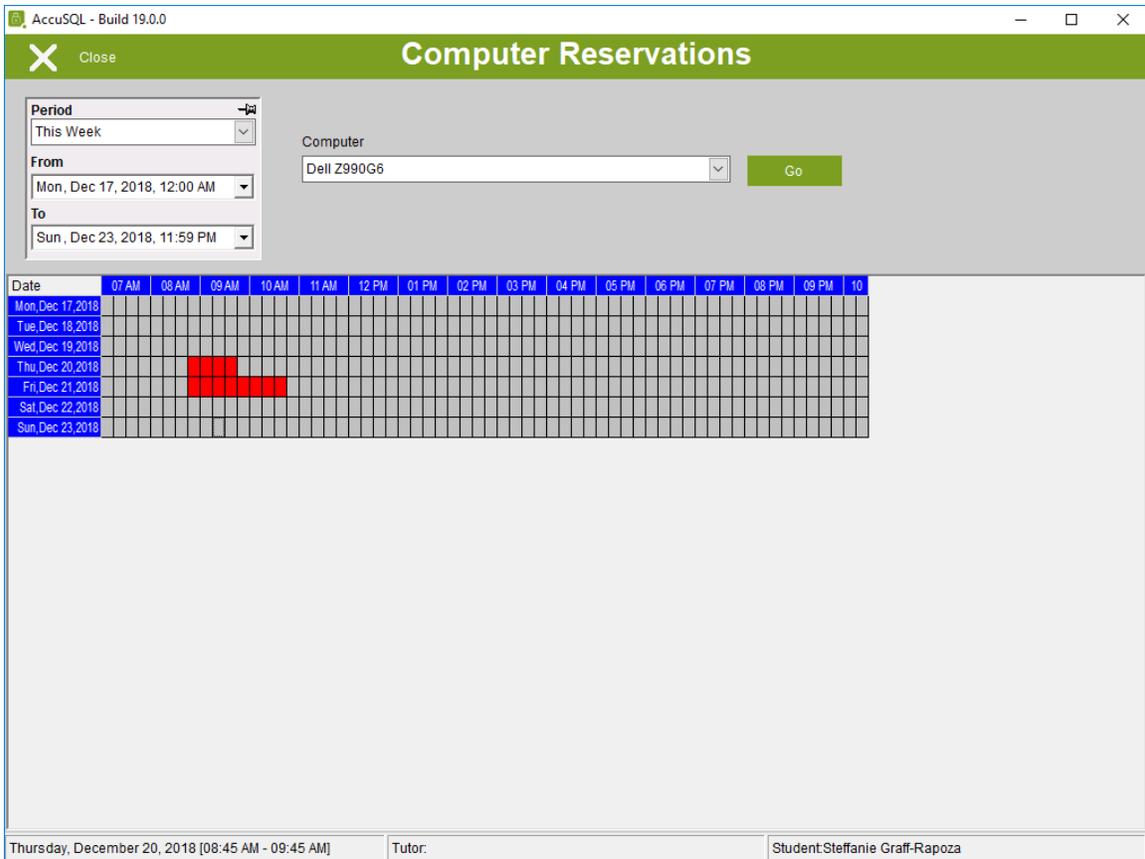


Click the Add button to add a new computer name. The names you create here are the computers that will be available to reserve for students. To edit an existing computer, click on it in the list and click Edit. After you are done, click Save.

COMPUTER RESERVATIONS

Access: From System Administration, click on Computer Reservations >> Computer Reservations.

When you first open the screen, you will see a Computer drop down box. Click to select the computer you want to view or add a reservation, and then click the Go button. You can also filter on a particular date range by using the Period filters on the left of the screen.

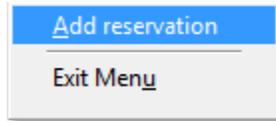


The time blocks are a colored red are reserved blocks. The light gray blocks are available.

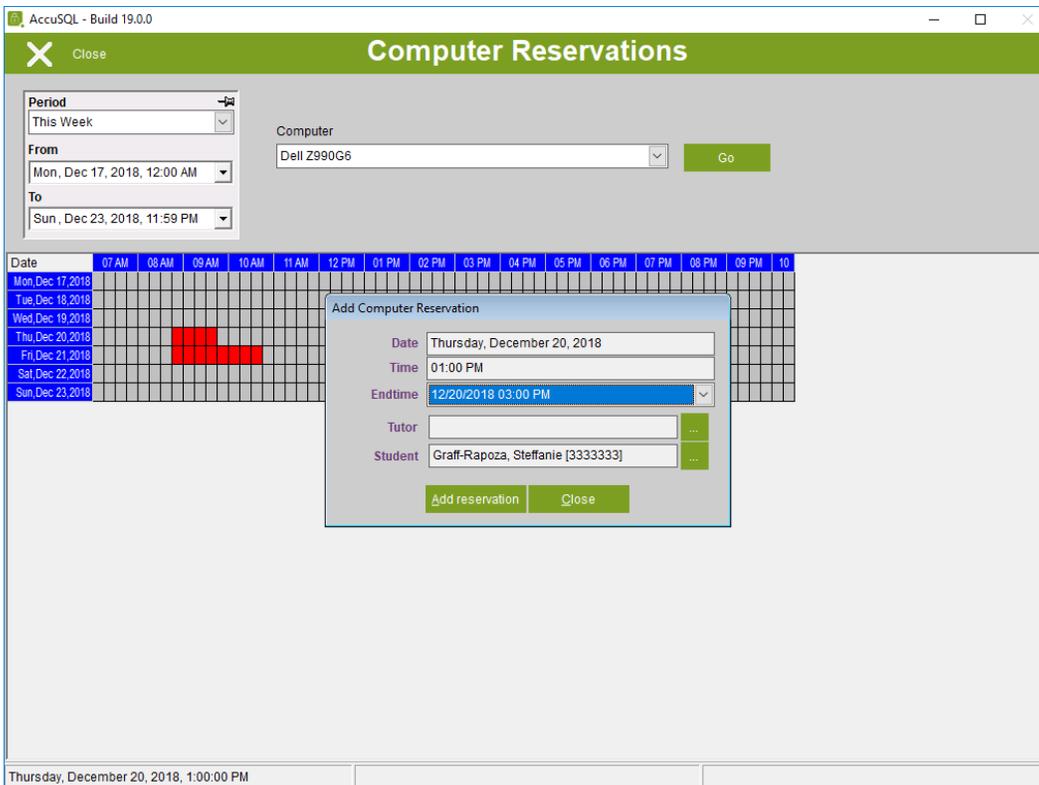
Adding a Computer Reservation

Note: Computer reservations are only available to be added for **dates and times in the future**. So for example, if you are displaying the current week and it is Friday, you would not be able to schedule a reservation for an earlier day in the week.

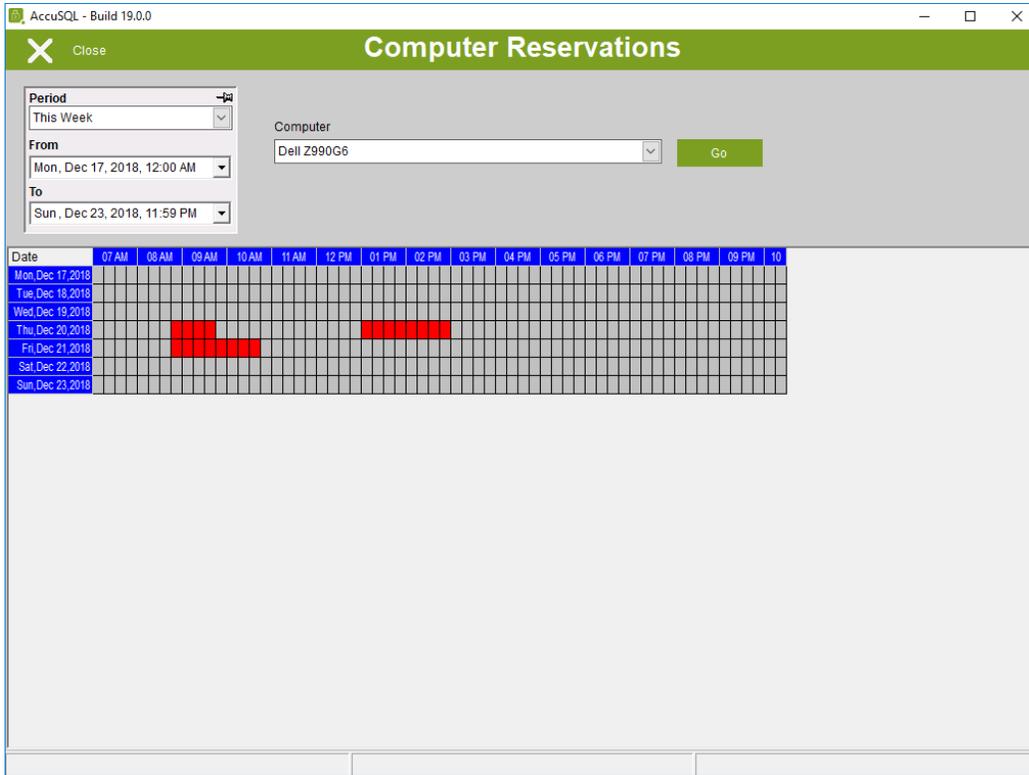
To add a reservation, click on the block of time for the Date you want in the grid. A pop-up box will appear. Click Add Reservation.



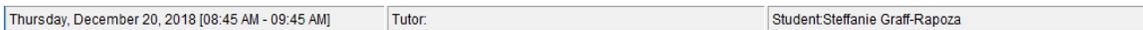
Now you will see the Add Computer Reservation box. In this box, the start date and time will automatically be filled in based on the block you picked from the grid. From the drop-down box, select then end time for the reservation, and the tutor (optional) and student for whom you are making the reservation.



Click Add Reservation to add it to the grid. You will see that block of time reserved now in the Computer Reservations grid.



If you move your mouse over a reserved, slot, you will see the details for that reservation in the status bar at the bottom of the Computer Reservations screen.



If you click on a reserved block, you will see options to remove the reservation or to expand or shrink the time for the reservation. Click the option you want from the options available.



Note: Computer Reservations do not have any Setup Options since all setup is handled through the main screen directly.

SYSTEM SCREEN

When you click on System from System Administration screen, you will see the following options:

- **Semesters:** Use to create the From and To date ranges for your various semesters.
- **Off Times:** Allows you to create off times for the entire center. Students will not be able to schedule appointments during center off times.
- **Rooms:** Allows you to create rooms that can then be used during appointment scheduling.
- **Lab IDs:** Used to create local labs.
- **Remote Shutdown Stations:** Used to shut log off or shutdown computers connected to AccuSQL/AccuTrack. **Note:** Based on Windows or Group Policy security settings, this may not be functional in all environments.
- **Export Reports:** Allows you to export any custom or memorized reports to a file where they can then be imported by other AccuSQL/AccuTrack users.
- **Import Reports:** Allows you to import custom or memorized reports created by other AccuSQL/AccuTrack users into your reports.

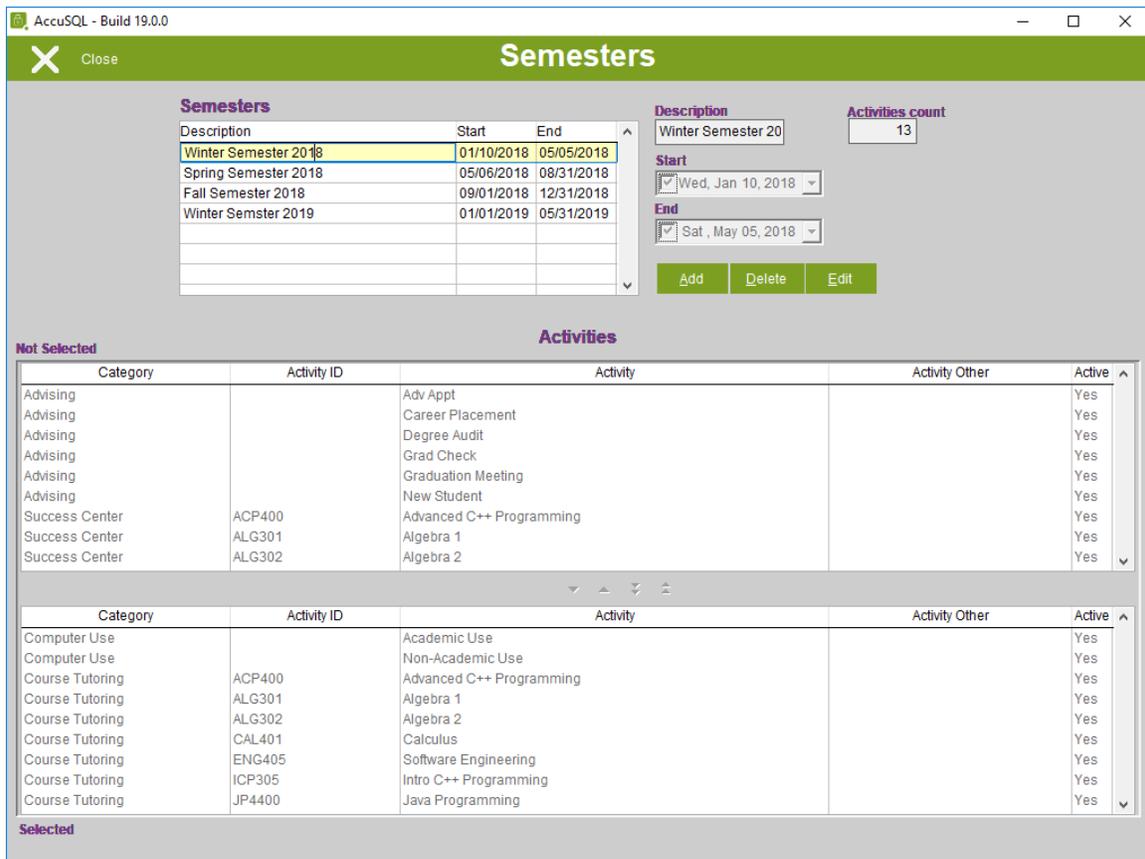
SEMESTERS

Purpose: To set up the semesters and the activities that will be available during those semesters.

Access: From System Administration, click on System >> Semesters.

Note: The semester dates are used to determine which activities are available for the given date. When AccuSQL/AccuTrack opens, it determines what today's date is and then any activities that are not selected for that day are automatically set to inactive in the system. If you get a "no activities are active" message when a student signs in, then you probably do not have any active activities or a semester setup that includes today.

Tip: The semesters you define can also be used for report filters.



This is an important screen as it allows you to define your semesters and assign them activities.

ADDING A NEW SEMESTER

To create a new semester, follow these steps:

1. Click on the "Add" button, type the description of the new semester in the text box, and enter the "Start" and "End" dates.
2. Select the activities that will be offered during this semester by using the Activities Mover List control to move activities to the right (Selected) grid.
3. Click the "Save" button to create the new semester. If the semester overlaps with an existing one, AccuSQL/AccuTrack will let you know and will not let you save the new semester until you fix the overlap.

MODIFYING A SEMESTER

To modify an existing semester, first highlight the semester in the list, and then click the "Edit" button. You can also double click on the semester's name to edit it. Make your changes and then click the "Save" button.

DELETING A SEMESTER

To remove a semester completely, click "Delete". Any activity assigned to that semester will also be removed from the semester.

REGISTERING ACTIVITIES TO A SEMESTER

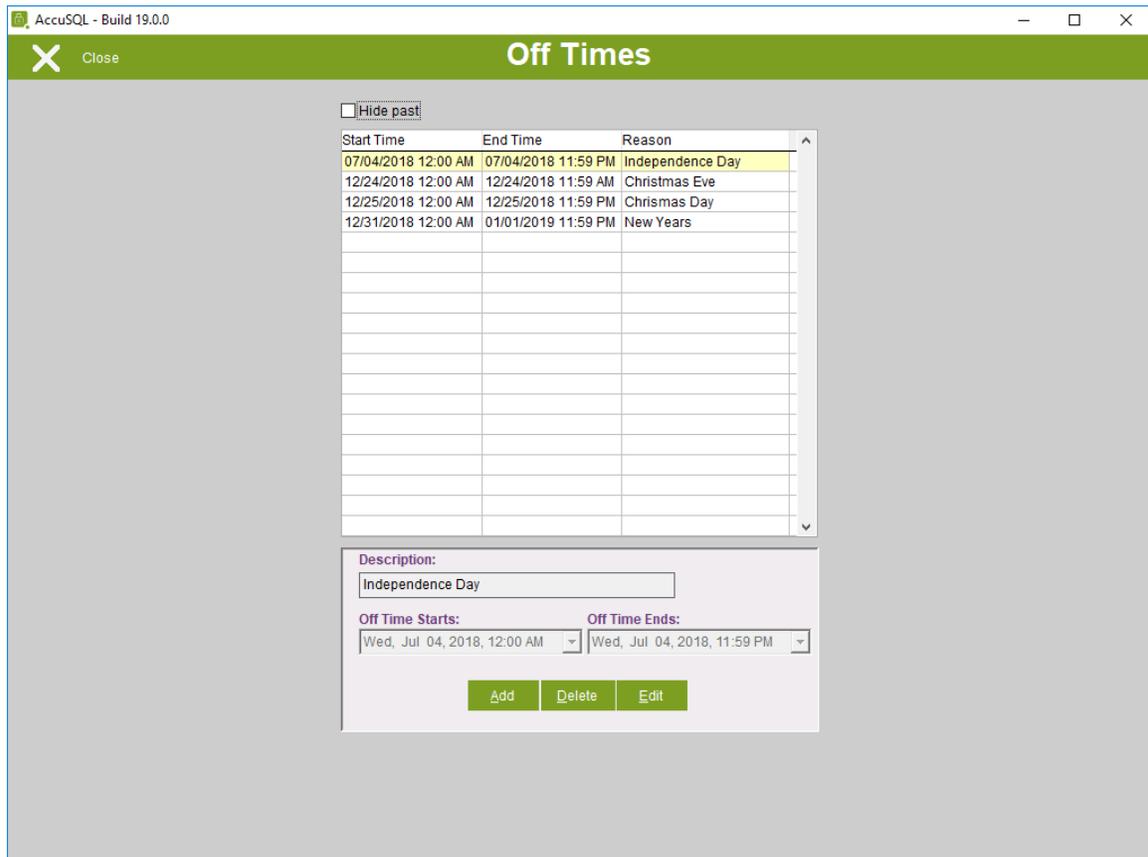
To register activities to a certain semester, edit the semester then move the activities from the "Not Selected" list to the "Selected" list by using the *Selection List Boxes* control. Once you have all the desired activities in the "Selected" list, click "Save". The Activities Count box at the bottom left side of the screen will show the number of selected activities (classes).

OFF TIMES

Purpose: To enter time periods during which appointments will not be offered.

Access: From System Administration, click on System >> Off Times.

On some occasions, your center will not be available for appointments (e.g. school holidays). Use this screen to enter these time periods. The periods you enter here will not be available for appointments.



The screen lists defined off periods. To enter a new period, enter a description and select the start and end time. Click on "Add" to complete the entry. To delete an off time, highlight it in the list by clicking on

it then hit the “Delete” button. You can also edit the off time by clicking on “Edit”, making the changes, then clicking on “Save”.

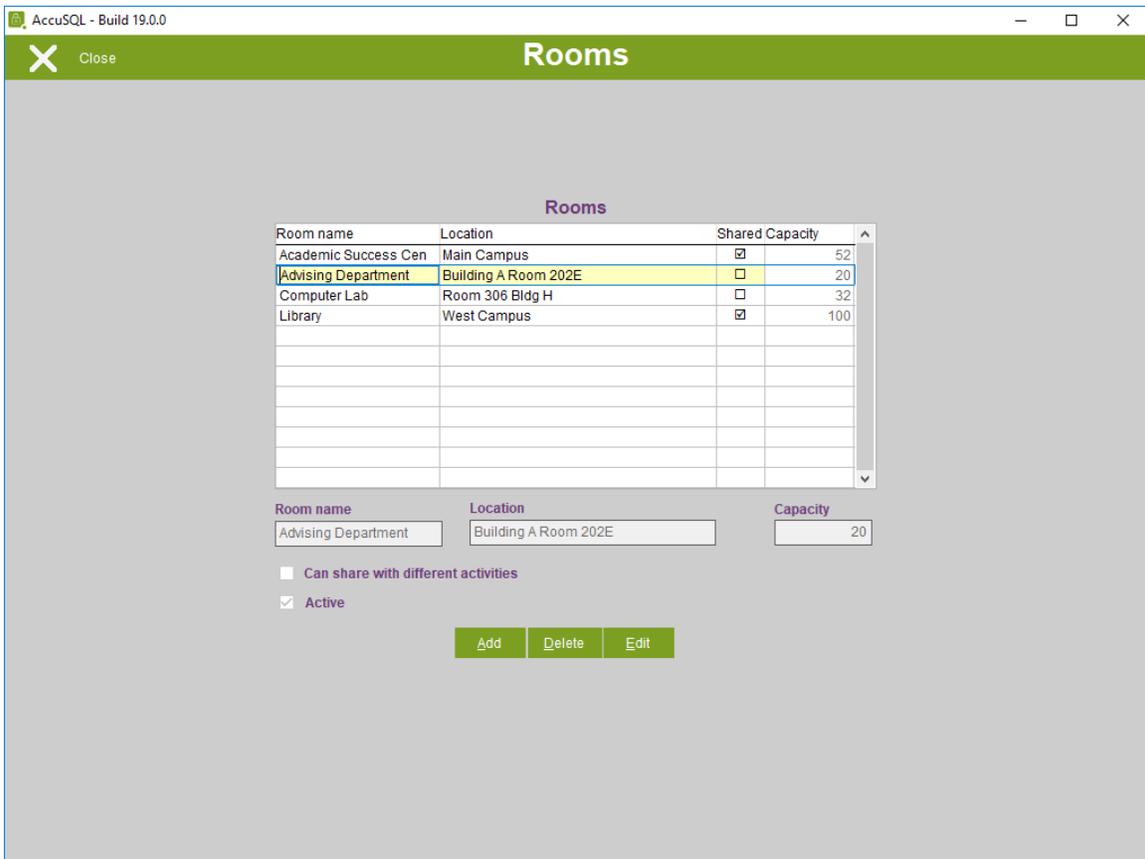
 **Tip:** You can use the calendar to enter the start and end times by clicking on the calendar icon.

 **Note:** It is important that you enter the off times **before** deploying the appointments scheduling module to ensure that no appointments are scheduled during off times.

ROOMS

Purpose: To add rooms that can be selected by admins or tutors during appointment scheduling.

Access: From System Administration, click on System>> Rooms.



Room name	Location	Shared	Capacity
Academic Success Cen	Main Campus	<input checked="" type="checkbox"/>	52
Advising Department	Building A Room 202E	<input type="checkbox"/>	20
Computer Lab	Room 306 Bldg H	<input type="checkbox"/>	32
Library	West Campus	<input checked="" type="checkbox"/>	100

Room name: Location: Capacity:

Can share with different activities
 Active

Note: Enable the room selection in the Set Appointments >> Setup >> Appointments Options screen by clicking the Assign Room for appointment checkbox.

ADDING A NEW ROOM

To create a new room, follow these steps:

1. Click the "Add" button, type the room's name, the location and the capacity (number of students that the room can hold). These text boxes are below the "Rooms" list:
2. Indicate whether the room can be shared with different activities by checking the appropriate box:
3. After you enter the required data, click the "Save" button to create the new room.

MODIFYING A ROOM

To modify an already registered room, first highlight the room in the list, then click on the "Edit" button. You can also double click on the room's name to edit it. Make your changes and then click on the "Save" button.

DELETING A ROOM

To remove a room completely, select it and click on "Delete".

LAB IDS

Purpose: To enter IDs of different labs sharing the same database.

Access: From System Administration, click on System>> Lab IDs.

If you are planning on using AccuSQL/AccuTrack in different areas (e.g. math area, reading area) or in multiple labs (e.g. Math Lab, Writing Lab), and you want all these areas and labs to share the same database, you will need to setup these areas in AccuSQL/AccuTrack

Note: If you are only running one center in AccuSQL/AccuTrack, then you would have no need to setup and use local labs at all.

Using local labs, you can have different sign in options, different activities (courses) displayed, different profile questions and answers, different custom surveys, and even a different look for each lab, all in one database. AccuSQL/AccuTrack knows which lab information to display by you setting the local lab assignment on the sign in stations to the local lab where that sign in station physically resides. For example, if you are setting up a Math Lab and a Writing Lab, you would create each local lab and set them up the way you want, and on the computer that is used for students to sign in in the Math Lab, you would set that computers local lab assignment to Math Lab in AccuSQL/AccuTrack. In the Writing Lab, you would set the lab on the sign in station to Writing Lab. A more detailed example of local labs appears later in the section.

When thinking whether or not to use local labs, you need to keep a few things in mind. Local labs have some advantages and also some disadvantages. If you have various centers and they are not concerned

about each other - for example, your Advising Center is collecting its own sign ins and is not interested in running reports for what is happening in the Tutoring Center - your best approach would not be local labs at all, but instead two different databases.

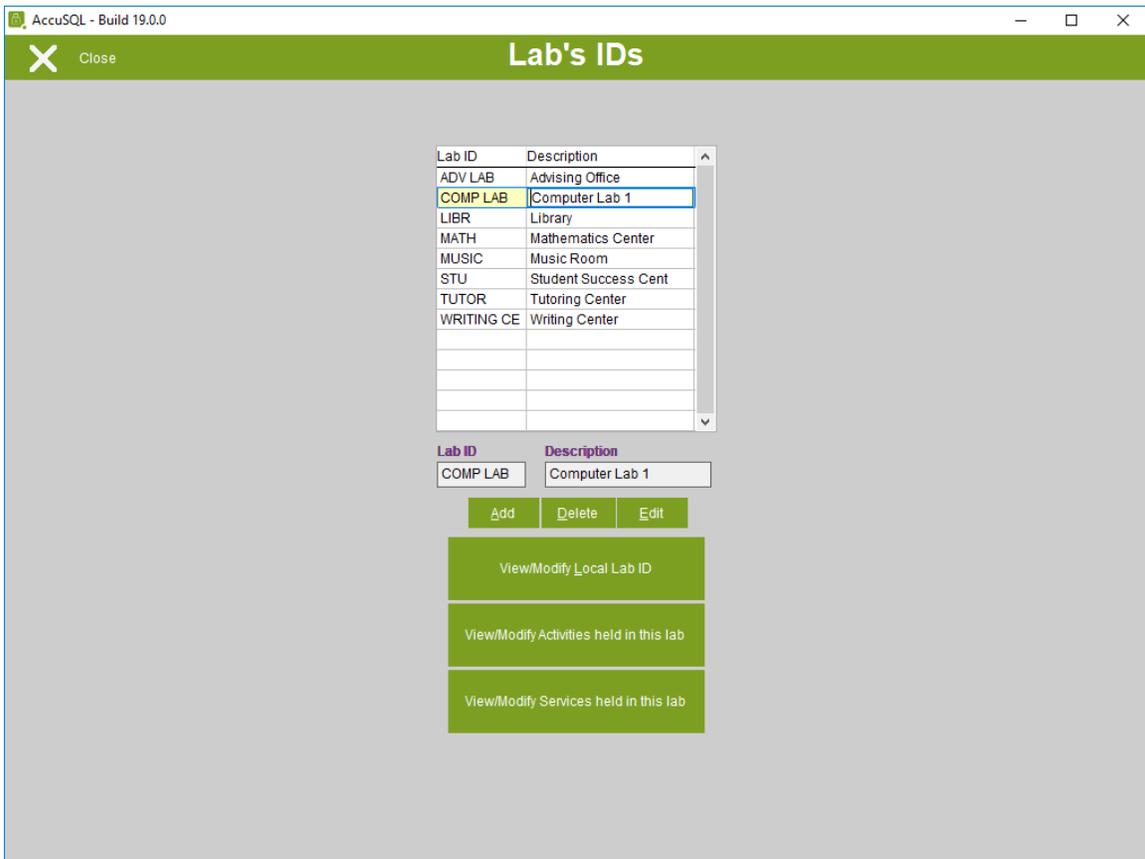
ADVANTAGES OF USING LOCAL LABS

The main advantage of using local labs is the ability to filter report information based on sign ins in those labs. For example, you might have a Math Lab and a Tutoring Center that offers help with College Algebra. Using local lab assignments, you can filter reports based on who received College Algebra help in either the Math Lab, the Tutoring Center, or both. SO, since you are using one database, if you need to run reports for the Math Lab and Tutoring center, you could do so without changing the database you where you are pointing AccuSQL/AccuTrack. Using the two different databases approach, that would be necessary.

Another advantage of using local labs is the ability to change the sign in workflow for various labs. For example, you could have a Tutoring Center and a Computer Lab. In the Tutoring Center you could have the students select form their registered courses and select, then select an available tutor and be put in an intake queue until they are called to be helped. In the Computer Lab you could have the students sign in and pick no activity or tutor at all. The reason you have this capability is because most the setup options in AccuSQL/AccuTrack can be applied differently to different labs.

CREATING A LOCAL LAB

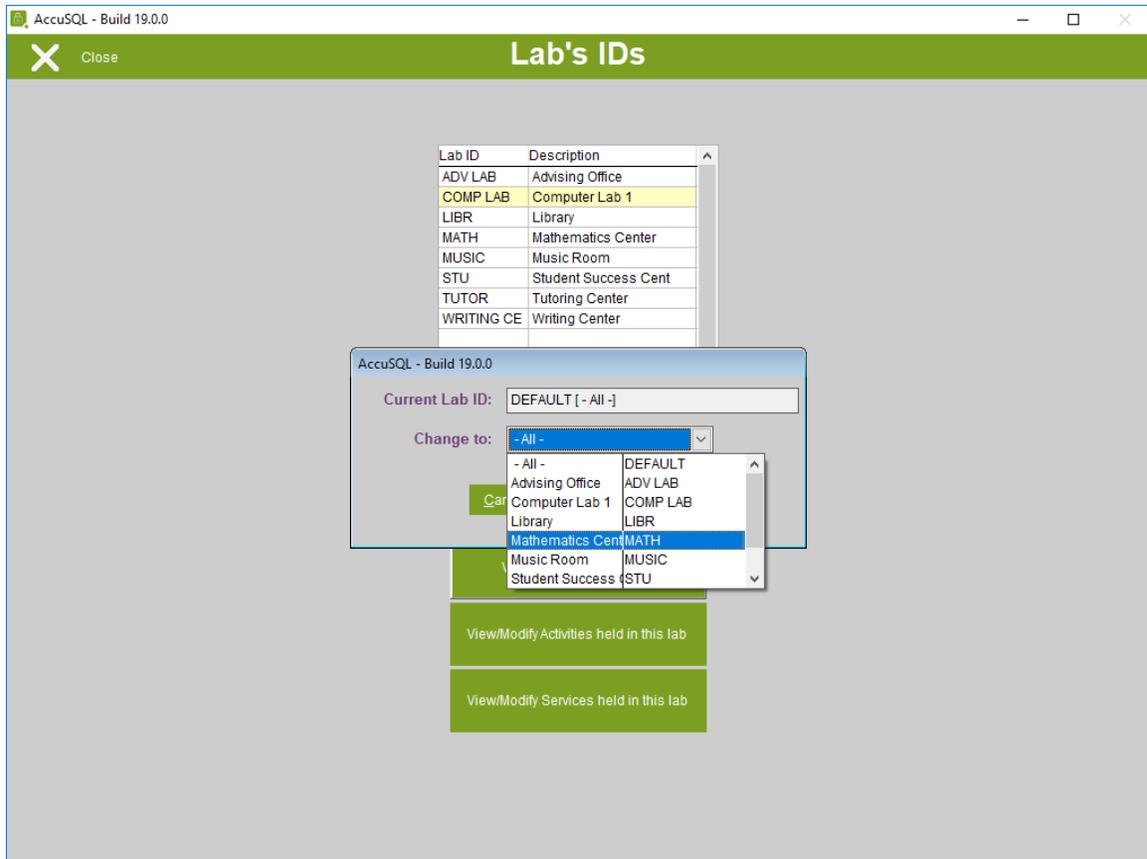
From System Administration, click on System>> Lab IDs.



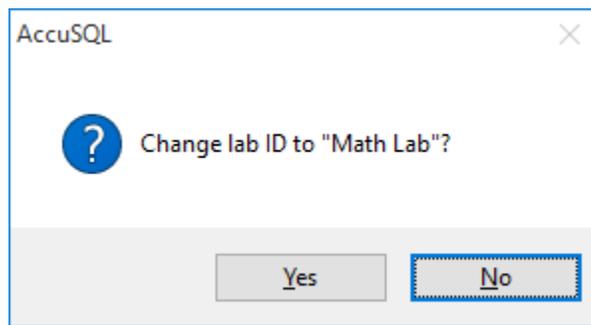
To add a new lab, simply click Add and type in the lab's ID and click Save. To Edit and existing lab ID, click it and click Edit, make the changes, and then click Save.

VIEW/MODIFY LOCAL LAB ID

To view or set the local lab ID, click on the “View/Modify Local Lab ID” button. This option tells the computer that it is to use the local lab configuration settings for sign ins, etc. To select the local lab for which you want to set the computer, click the Change to drop-down box and select the local lab from the list and click Save.



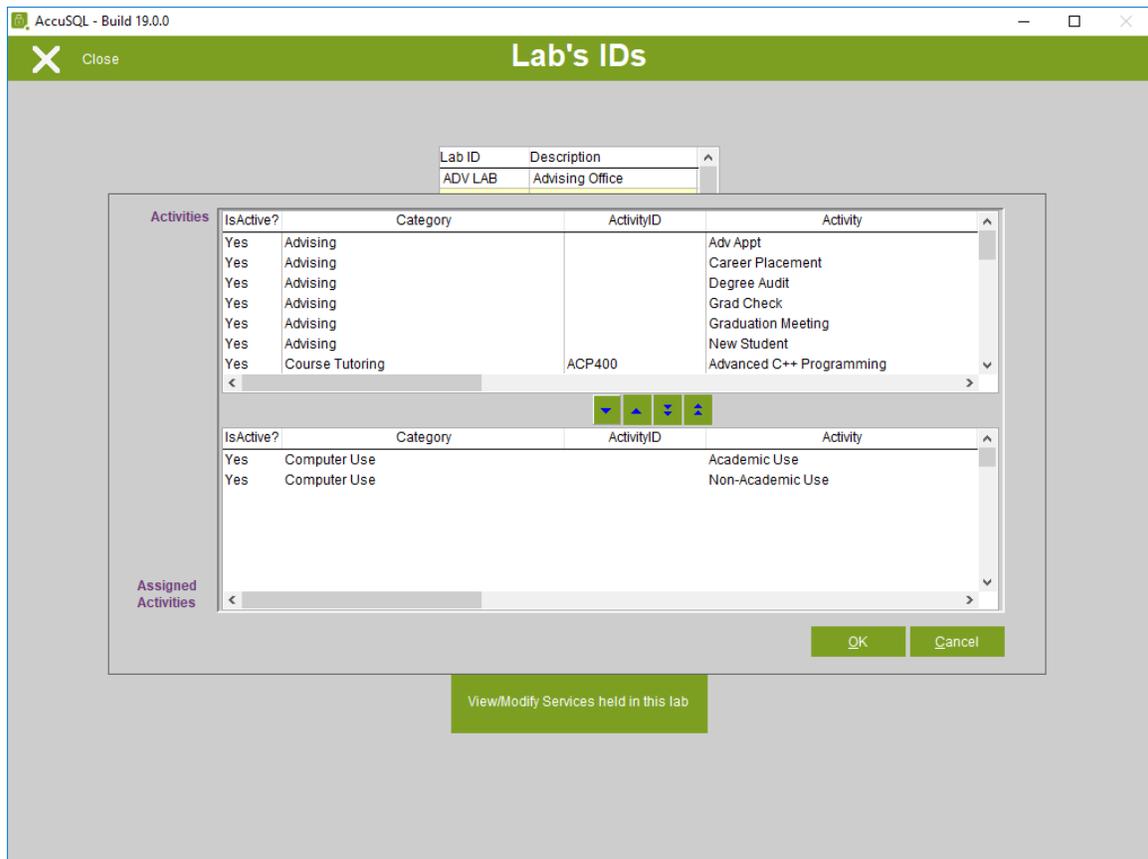
You will get a confirmation box. Click Yes to set the local lab to the one you selected.



Note: The IDs you enter here will appear in the various AccuSQL/AccuTrack screens that allow a per-lab view. For example, Options screen, Who’s In screen, Sign Student in screen, and Reports screen.

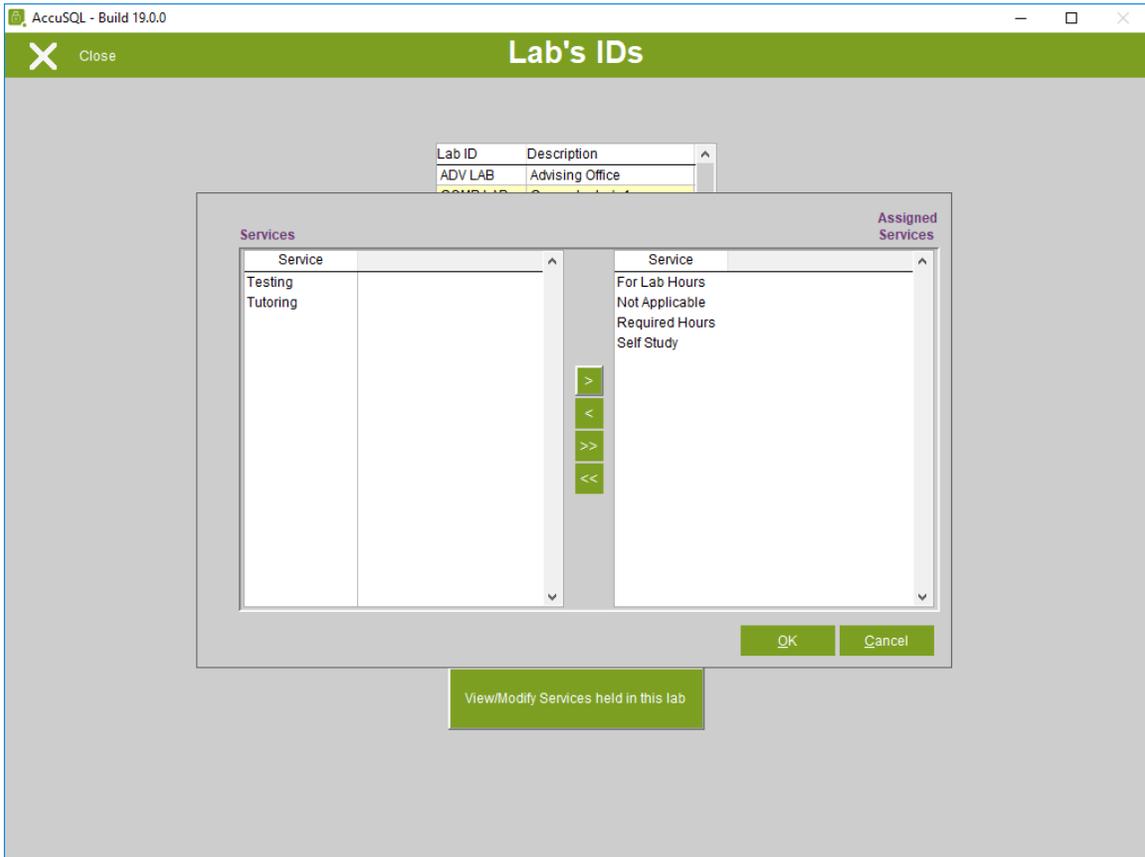
VIEW/MODIFY ACTIVITIES HELD IN THIS LAB

To view or set activities held in this lab, click on the desired lab in the grid, and then click on the “View/Modify Activities held in this lab” button. The activities that will be available for students to sign into in that lab will be displayed in the lower Assigned Activities grid. You can move activities to the Assigned Activities grid by double clicking on the upper grid. You can also use the Shift key to select a block of activities or the Ctrl key to select multiple records. After you have selected the activities you want, click the down arrow to move them either to the Assigned Activities grid or from the Assigned grid back to the upper “available” Activities grid.



VIEW/MODIFY SERVICES HELD IN THIS LAB

You can assign specific Service Types that will appear for students to select at sign in for the local lab. To view or set services held in the lab, click on the desired lab in the grid, and then the “View/Modify Services held in this lab” button.

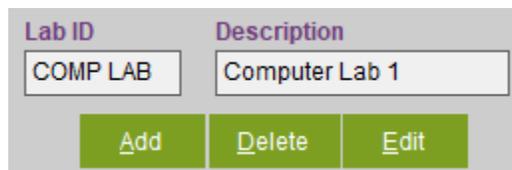


Move the services you want to be available in the lab into the Assigned Services grid (on the right) and then click OK.

Note: Service Types are created in the System Administration >> Sign-in Setup >> Service Type screen and are enabled at sign in in the System Administration >> Sign-in Setup >> Setup >> Activity Screen Options by clicking the Service Type checkbox.

LOCAL LAB USAGE EXAMPLE

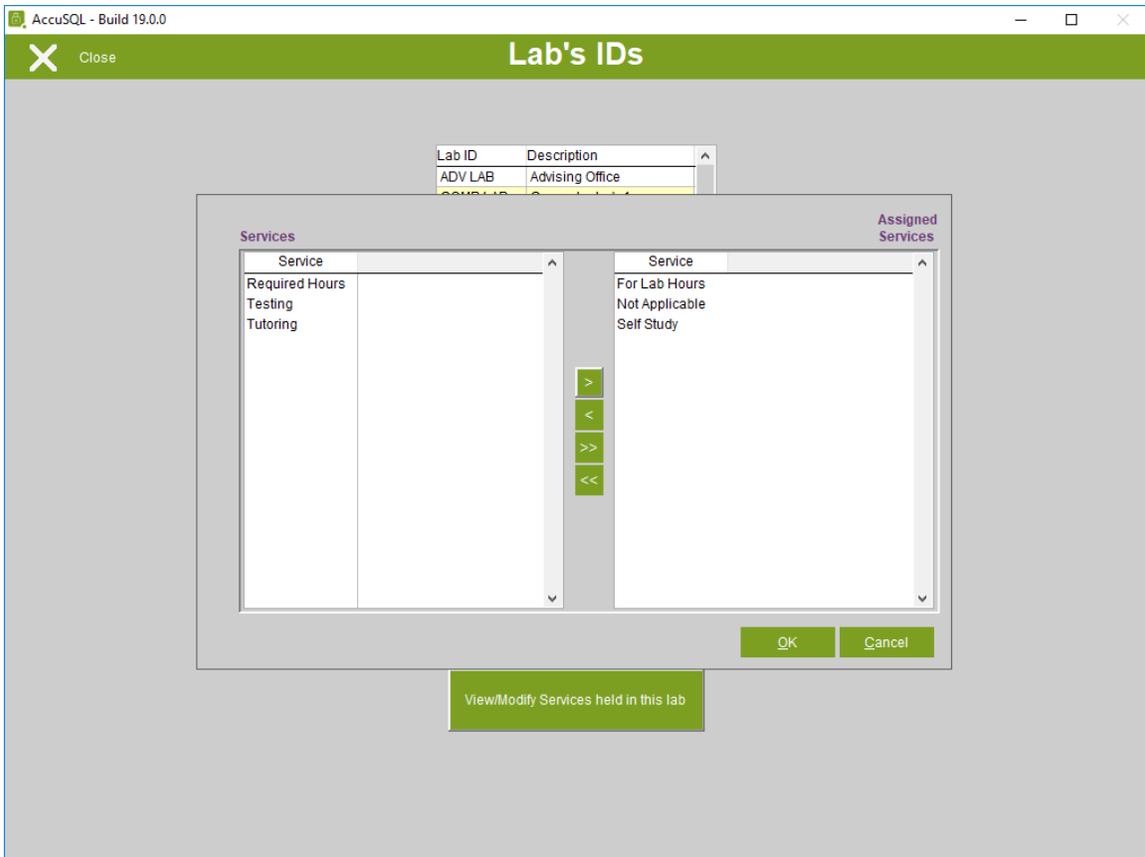
In the following example, a Computer Lab 1 (COMP LAB) lab has been created.



The Activities that will be available in the Computer Lab 1 have been created using the Sign-in Setup >> Categories & Activities screen. The activities are all entered under a category called Computer Use.

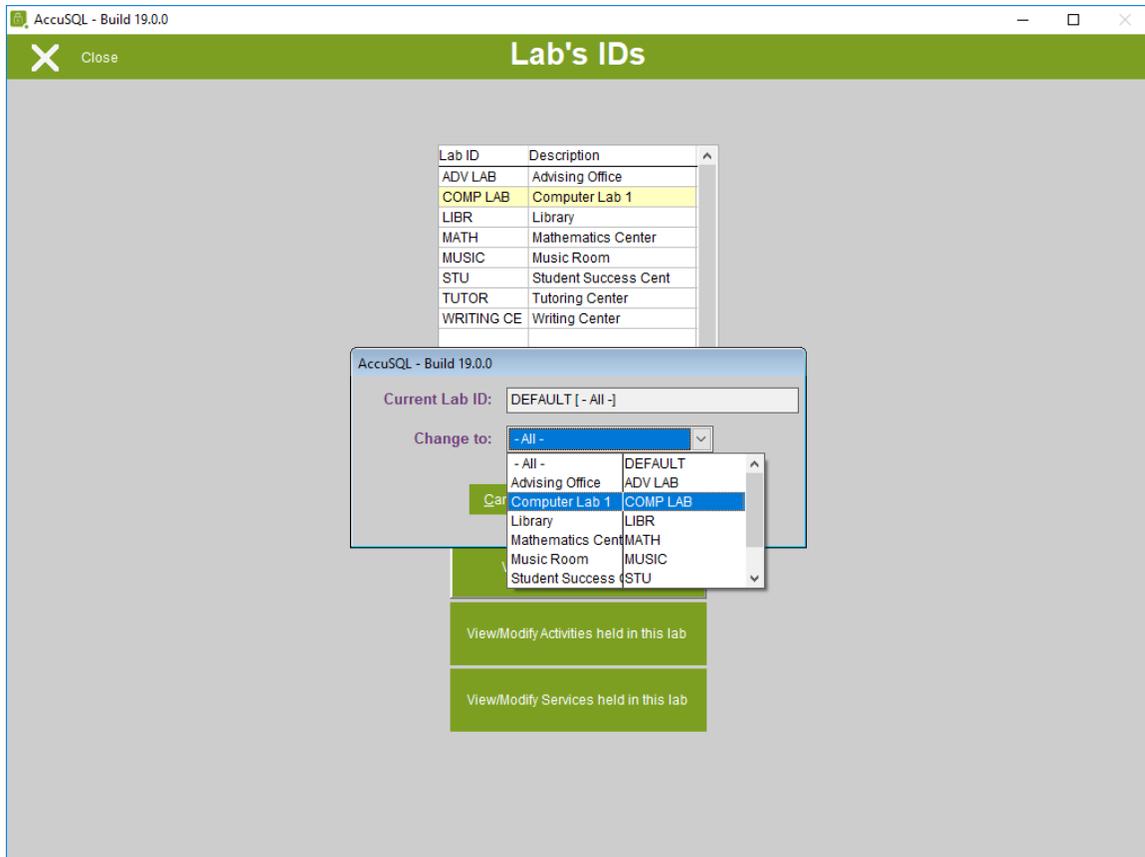
The screenshot shows the 'Categories & Activities' interface. On the left, the 'Category' list includes 'Computer Use', which is highlighted with a red box. The 'Activity' table on the right shows two activities: 'Academic Use' and 'Non-Academic Use'. Below the table, the 'Activity' form is visible, showing 'Academic Use' as the selected activity. The 'Available in these specific labs' section has a list box with 'Computer Lab 1 [COMP LAB]' selected and highlighted with a red box. The 'Appointment Duration' section shows 'Min' and 'Max' dropdowns both set to 0. The 'Activity Schedules' and 'Instructors' sections are also visible.

Now back in System >> Lab IDs, the activities that will be available in the Computer Lab 1 have been added using the View/Modify Activities held in this lab screen.



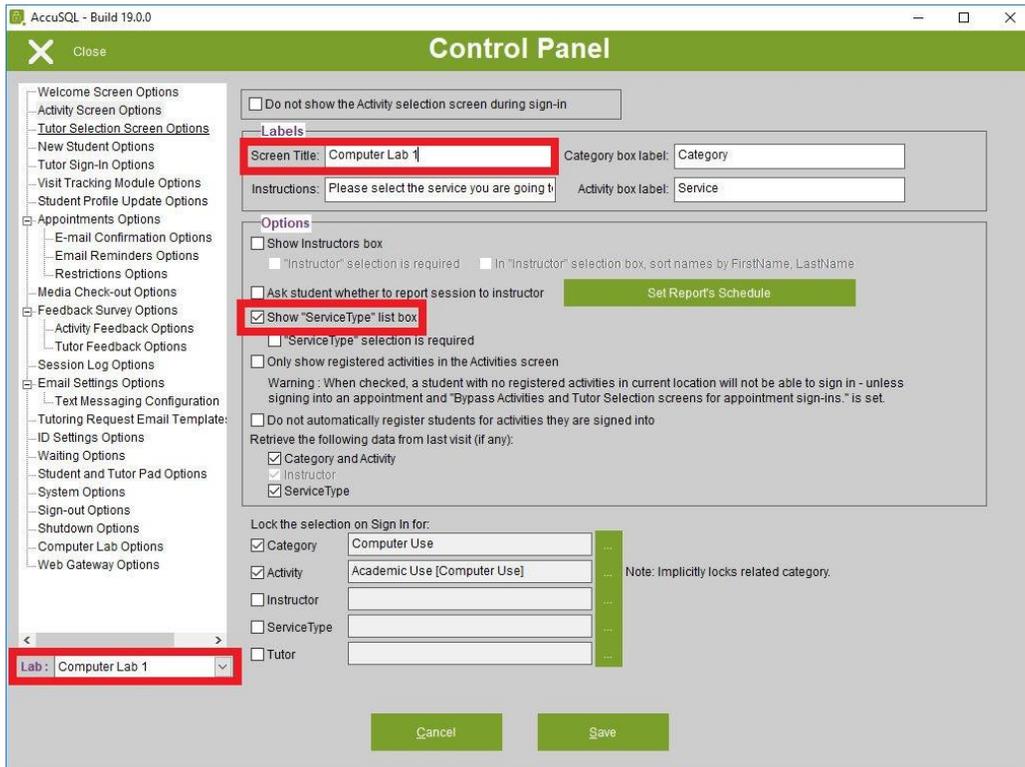
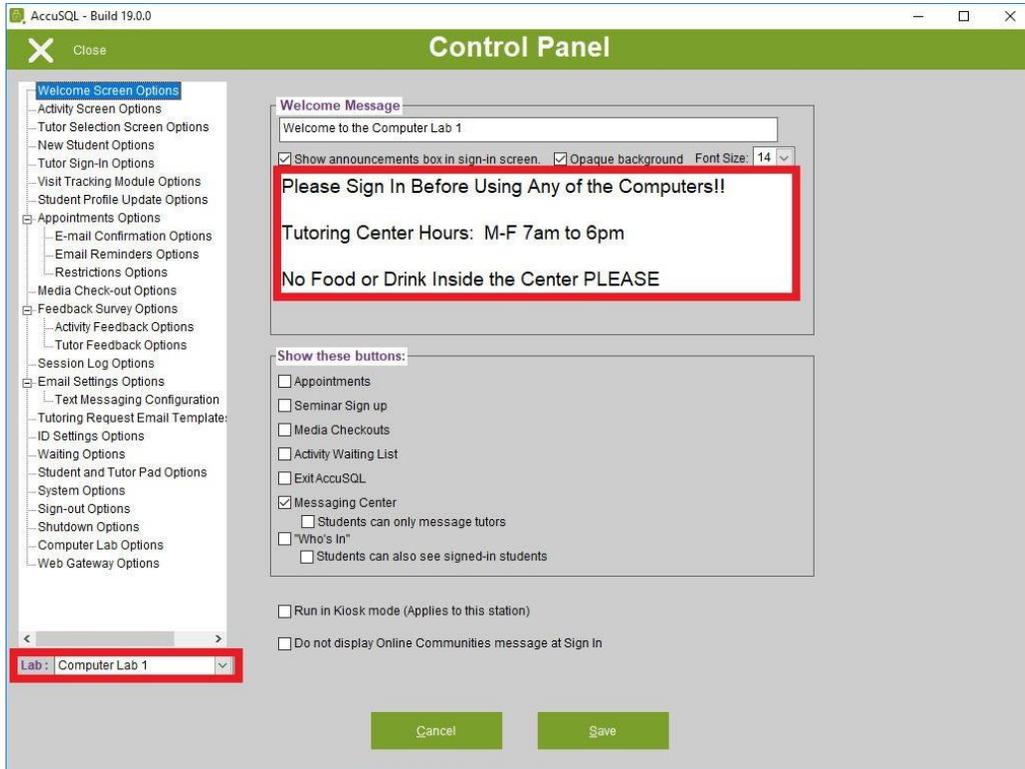
Specific Service Types that will be available in Music Room have also been added using the View/Modify Services held in this lab screen.

To make it easy to setup the various options for the Computer Lab 1, the View/Modify Local Lab ID has been set to Computer Lab 1 (COMP LAB)

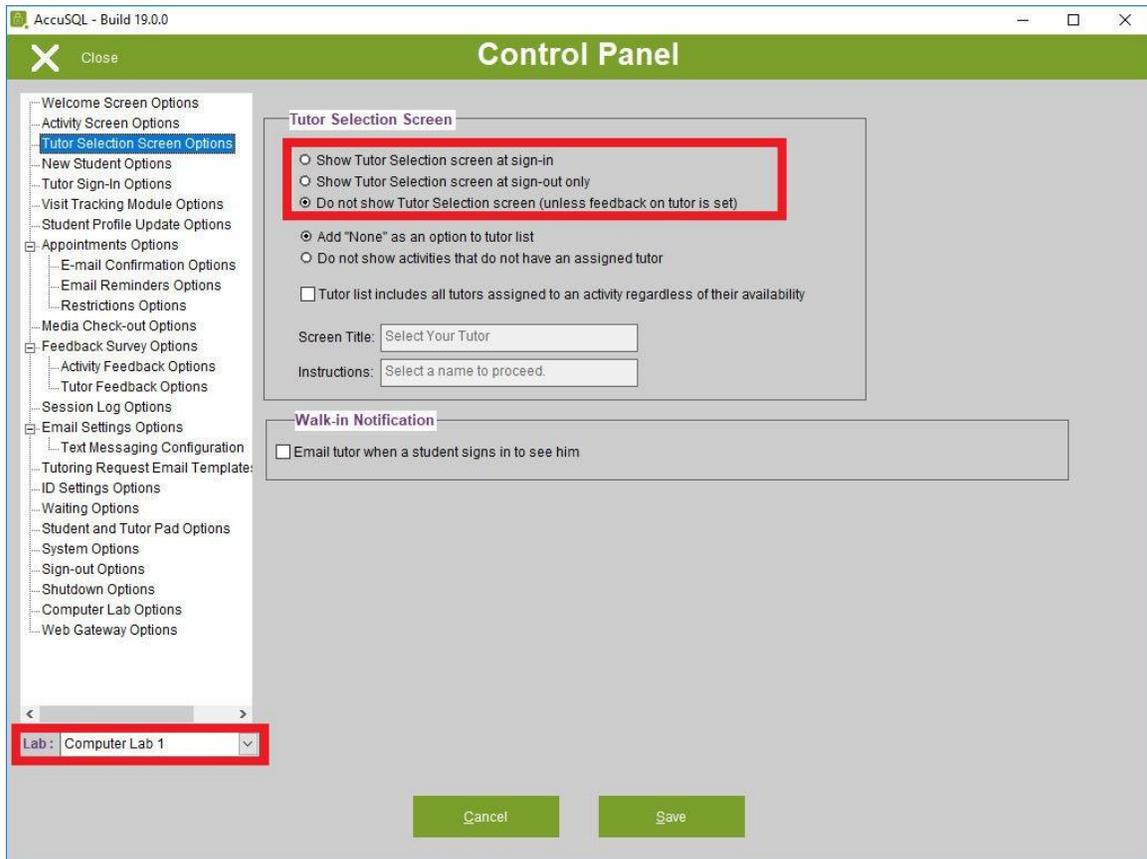


Now the options for how students will sign into the Music Room are setup using the different Sign-in Setup >> Setup >> screens. The Welcome Message Options Welcome Message is entered as Welcome to the Computer Lab 1 and the announcements have been edited accordingly.

In the Activity Screen Options, then various labels have been changed. Also the Service Type selection has been enabled.

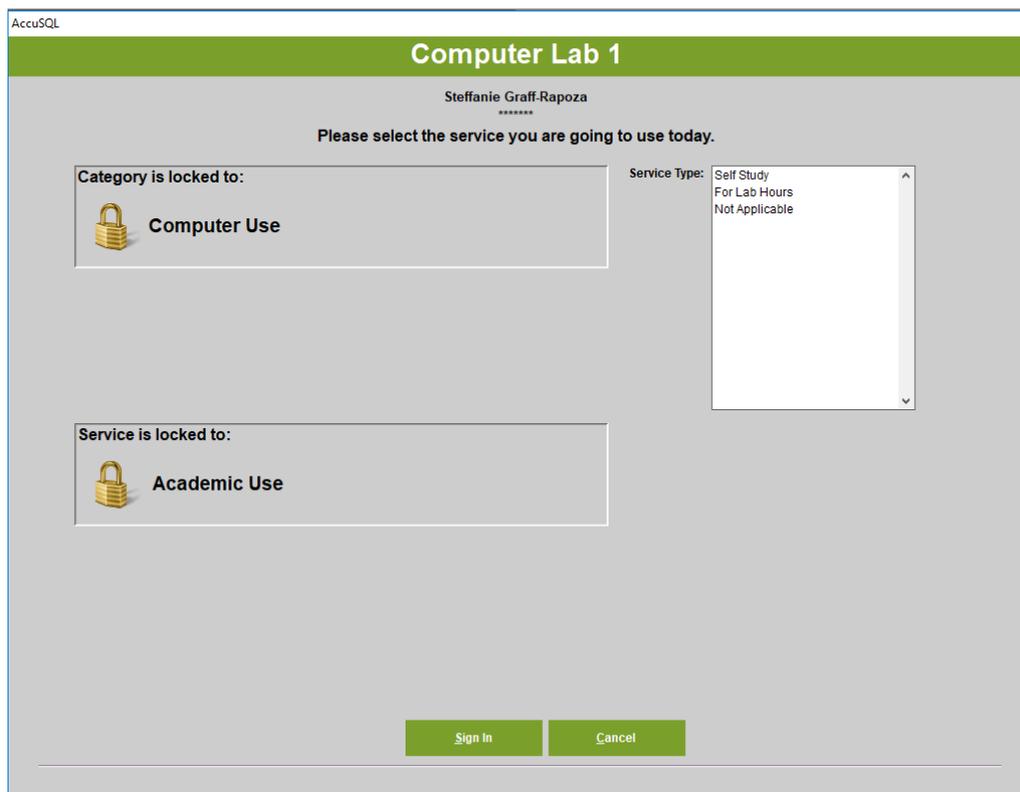
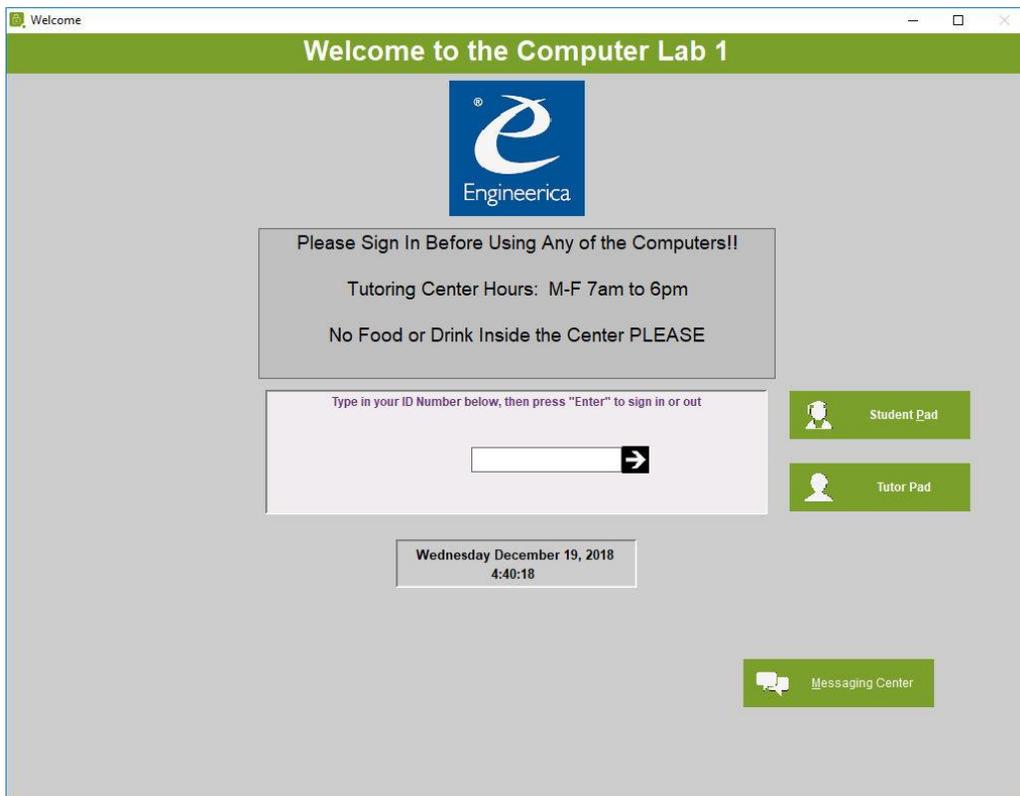


Finally, in the Tutor Selection Screen Options, selecting a tutor has been disabled completely.



In the System >> Setup >> System Options, the background for the Computer Lab 1 was changed as well.

When a student signs into the Computer Lab 1, it will appear like this:



Steffanie Graff-rapoza signed in at 12/19/2018 05:09 PM

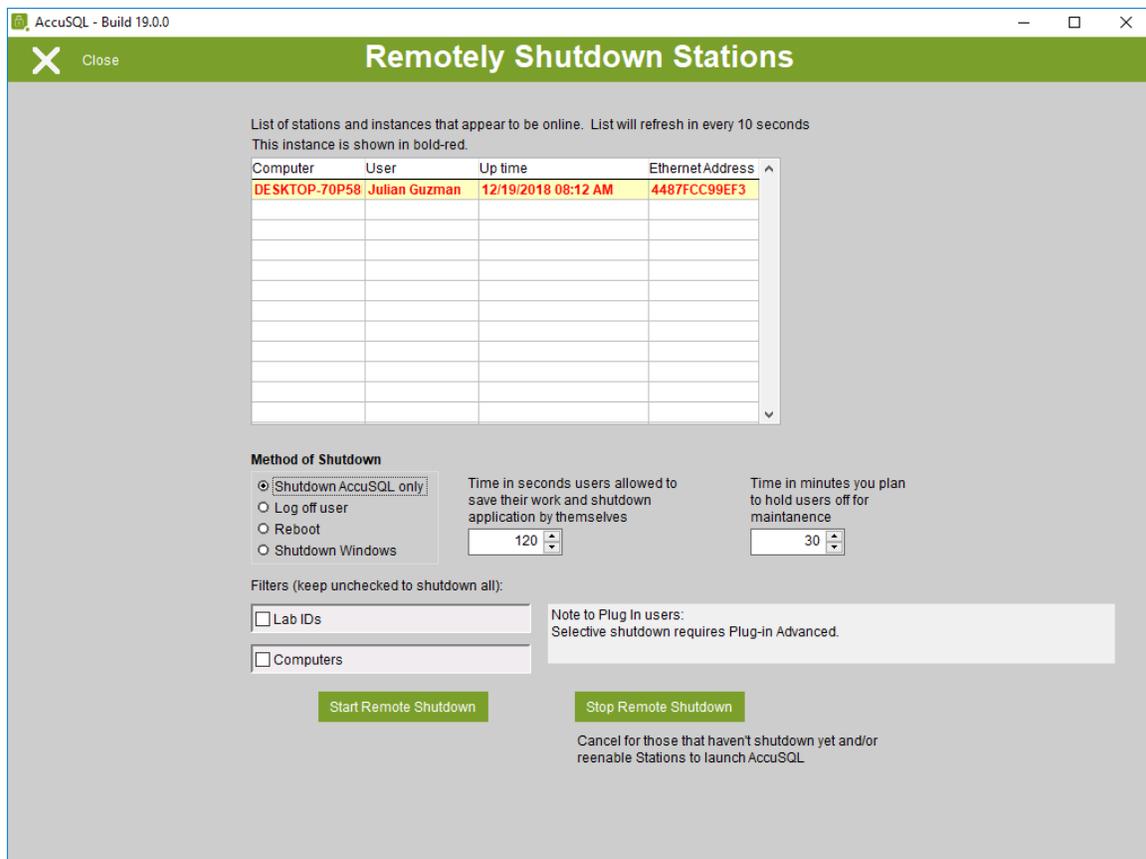
Now I can run reports for what is happening specifically in the Music Room using the Lab IDs report filter and setting it to Music Room.

REMOTE SHUTDOWN STATIONS

Purpose: To display information about computers sharing the database and to remotely shutdown administrator computers for maintenance

Access: From System Administration, click on System → Remotely Shutdown Stations.

Use Remote Shutdown to see which administrator computers are currently logged into AccuSQL/AccuTrack and to initiate remote shutdowns of those computers.



To make it more convenient for you to run database operations, this screen will display the computer stations currently sharing the database and it will allow you to exit AccuSQL/AccuTrack on these stations.

The *SuperTable* in this screen lists all computers using the database. This includes the computer's name, the user's name, the time AccuSQL/AccuTrack was launched on that computer, and Ethernet address of the computer running AccuSQL/AccuTrack. This list will periodically refresh itself.

 **Tip:** The computer you are using will appear in red font in this screen.

 **Note:** If a station experienced an improper shutdown (e.g. computer powered off without exiting AccuSQL/AccuTrack first) and was not restarted since, this station will appear in this screen even though it is not really running AccuSQL/AccuTrack.

To exit AccuSQL/AccuTrack on the other computers, set the following values:

1) Method of shutdown:

You have 4 methods available: Exit AccuSQL/AccuTrack only, log off from Windows, reboot the computer, or shutdown the computer. However, the last three methods might fail if the Windows account running AccuSQL/AccuTrack on these stations does not have enough privileges to carry out the shutdown command. For example, Windows policies might block shutdown of the computer. In this case, AccuSQL/AccuTrack will simply exit on these stations.

Note: If you need to shut down the sign in stations for AccuSQL/AccuTrack and not just administrator stations, you need to select Log off user, Reboot or Shutdown Windows.

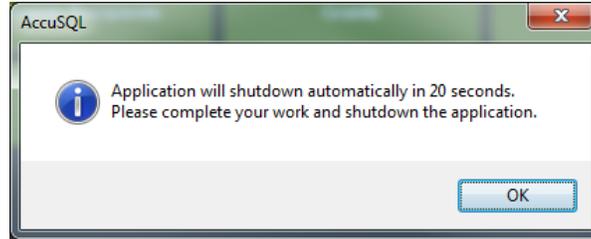
2) Time in seconds users are allowed to save their work:

Use this spinner box to indicate how many seconds you want to give users before exiting. In other words, this defines the countdown timing for exit. During this time users that they might be using AccuSQL/AccuTrack can finish what they are doing and exit. Add roughly 30 seconds to time you define here before all stations will be off. For example, if you use 60 seconds, expect all stations to be off in 90 seconds.

3) Time in minutes you plan to hold users off:

Use this spinner box to indicate how many minutes you plan to run the maintenance operations. During this time, users will not be allowed to launch AccuSQL/AccuTrack on other computers. Use higher values than what you estimate you will need. For example, if you think you need to keep users off for 10 minutes, use a value like 15. If you finish the maintenance work earlier you can click on “Stop Remote Shutdown” button or exit and restart AccuSQL/AccuTrack to allow other users to launch AccuSQL/AccuTrack.

After selecting the shutdown method, count down time, and how long you need everyone off the database, click the “Start Remote Shutdown” button. Other users of AccuSQL/AccuTrack will see the following box:



The countdown will continue on this box. To stop the countdown message, users can click “OK” and finish their work. If the users do not exit the software, or if the station is not being used, AccuSQL/AccuTrack will exit when the time expires.

If the user tries to log back while the maintenance window is still in effect, a message will appear indicating maintenance is still in progress.

Note: Depending on your computer security settings or group policy settings, this feature may not work if Windows prevents it. If a Shutdown AccuSQL/AccuTrack command does not work, you can try another method, but be careful, you could shutdown stations where people are still working!

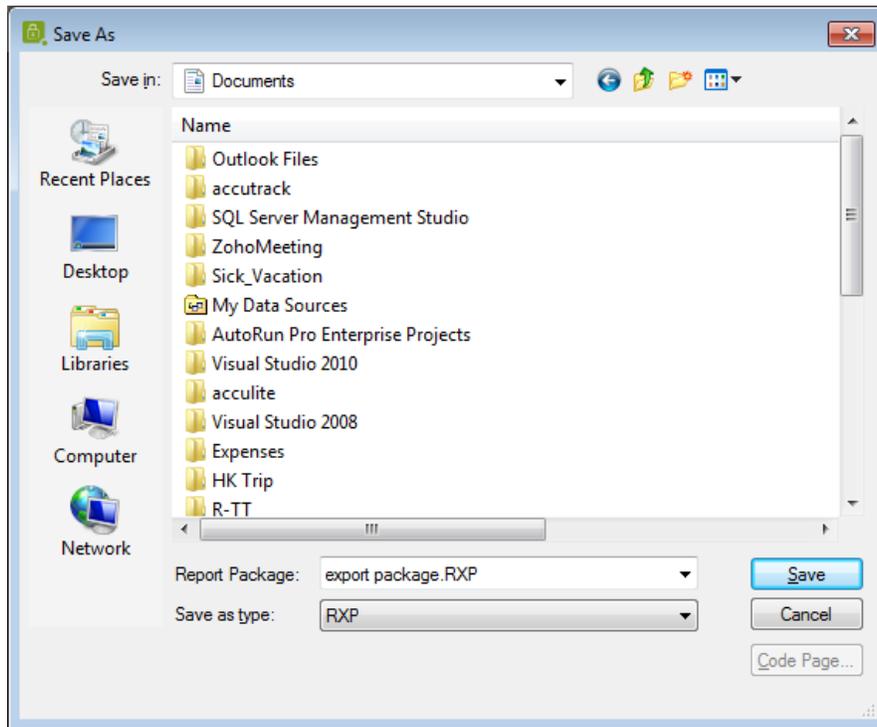
EXPORT REPORTS

Purpose: Exports student and tutor reports to hard drive.

Access: From System Administration, click on System → Export Reports.

Use Export Reports to save any customized or memorized reports to a file that can then be imported by other users. This is helpful if you are not all using the same application shared path, or using different databases, but want to share your customized or memorized reports with others. You can also use this feature if when you created the report, you made it only available to yourself but now you want other to be able to use it.

After you have selected the reports you want, click Close and you will be presented with a Save As screen. Navigate to where you want to save the reports and click the Save button.



Note: When you export reports, there are two files that are created, and EXPORT PACKAGE.FPT file and an EXPORT PACKAGE.RXP file. You will need both of these files for the report import process.

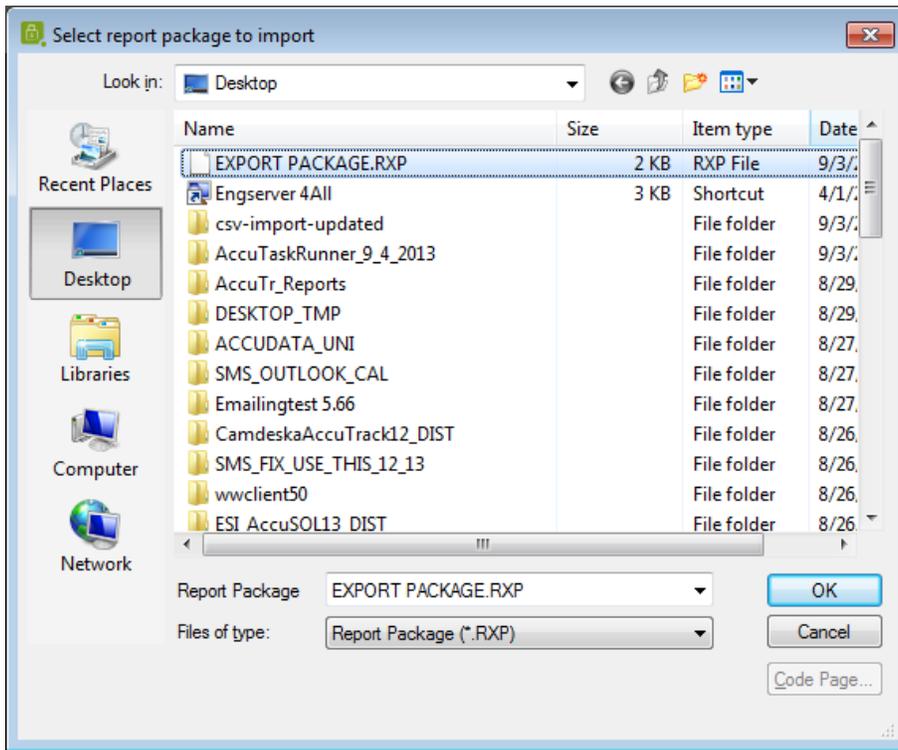
IMPORT REPORTS

Purpose: Imports data and reports from hard drive into AccuSQL/AccuTrack.

Access: From System Administration, click on System → Import Reports.

Use Import Reports to import any customized or memorized reports created by other users of AccuSQL/AccuTrack. If, for example, an AccuSQL/AccuTrack admin using a database in the math lab created a custom report, and you would like to use it for your tutoring center database, the person in the math lab could export the report and then you can use this option to import it so it will be available in your own Customized Reports report list.

After you click Import Reports, you will be presented with a Select report package to import screen. Navigate to where the EXPORT PACKAGE.RXP file is located and select it and click OK.

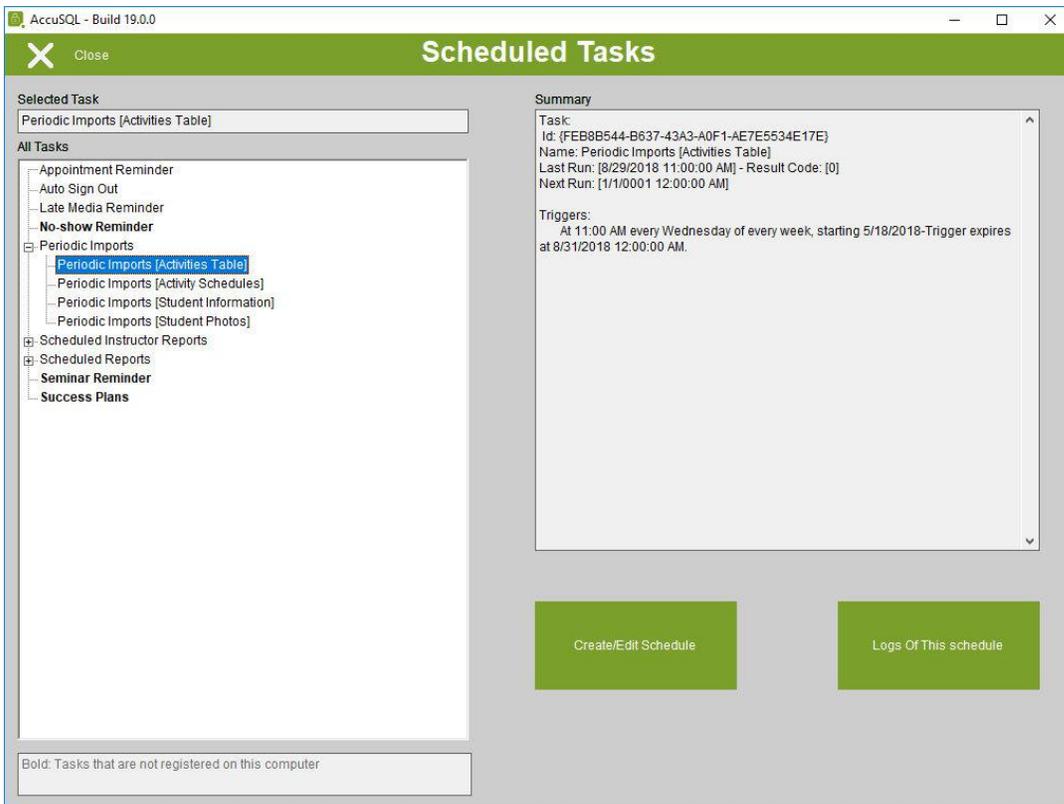


NEW AUTOMATED TASK SCHEDULER – ACCUTASK SCHEDULER

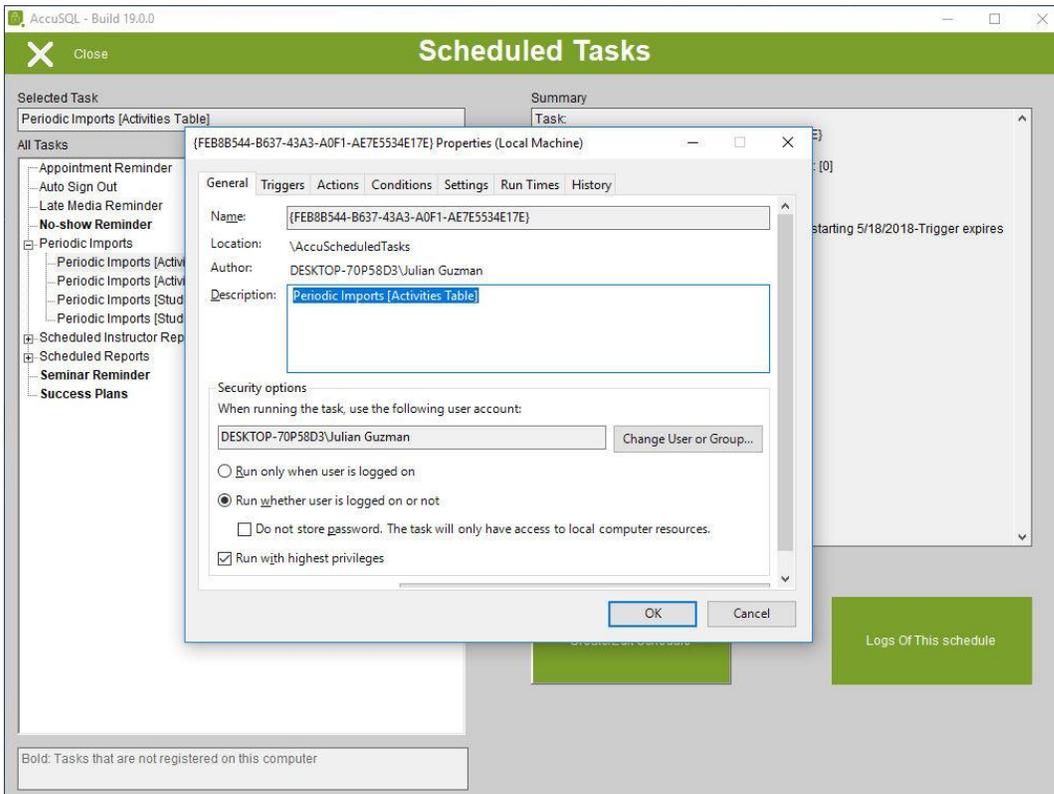
Purpose: Set automated tasks for Appointment Reminder, Auto Sign Out, Late Media Reminder, No-Show Reminder, Periodic Imports, Scheduled Instructor Reports, Scheduled Reports, Seminar Reminder, Success Plans

Access: From System Administration, click on System → Task Handler.

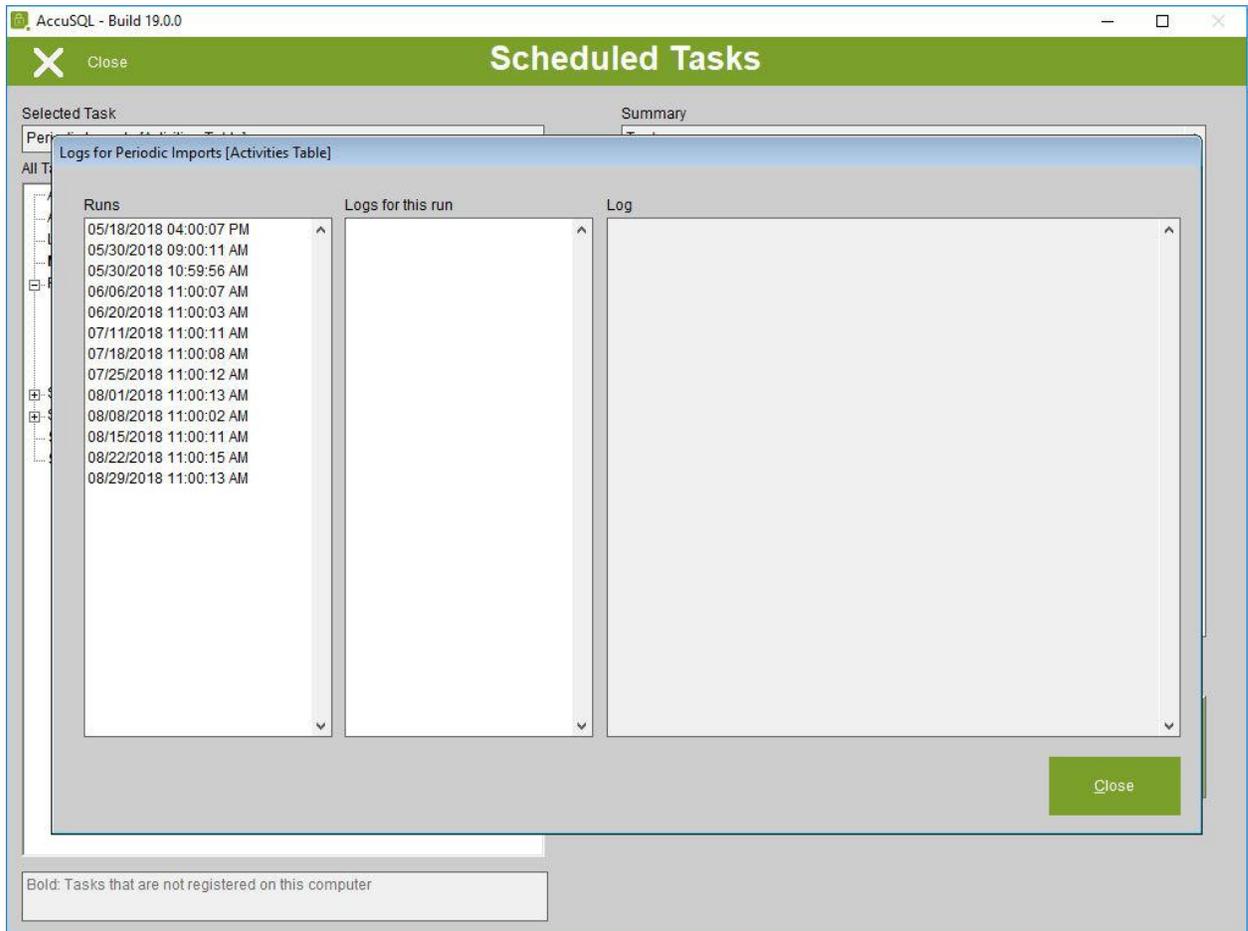
Click on Task Handler to launch the Scheduled Tasks screen. From this screen, you can select which task you would like to setup as an Automated Task.



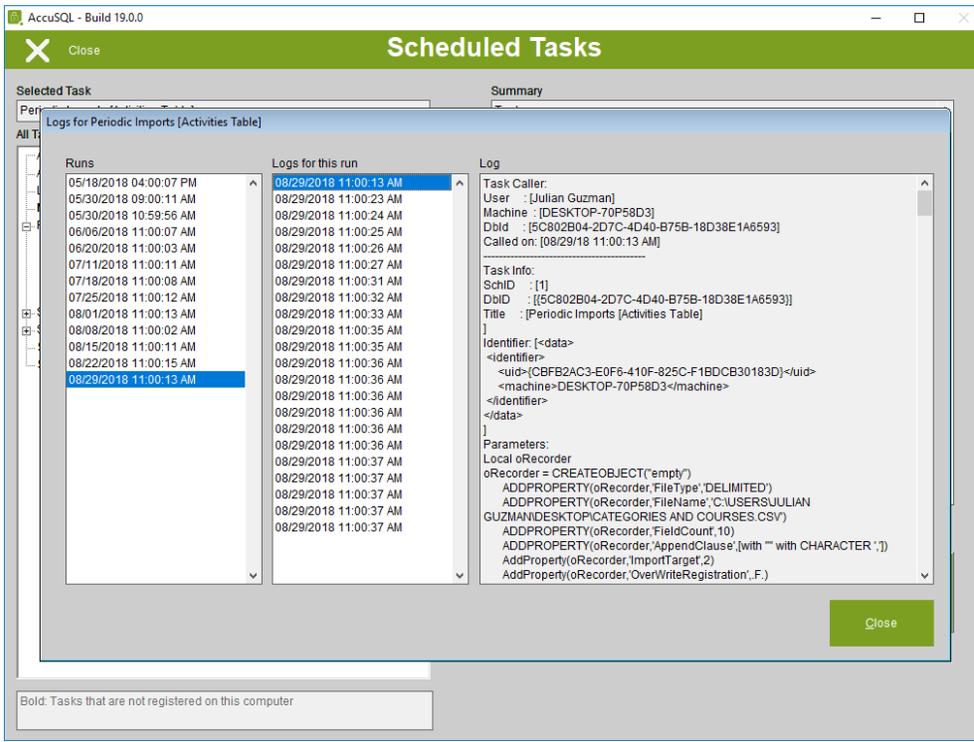
Click the **Create/Edit Schedule** button to launch the Windows Task Scheduler:



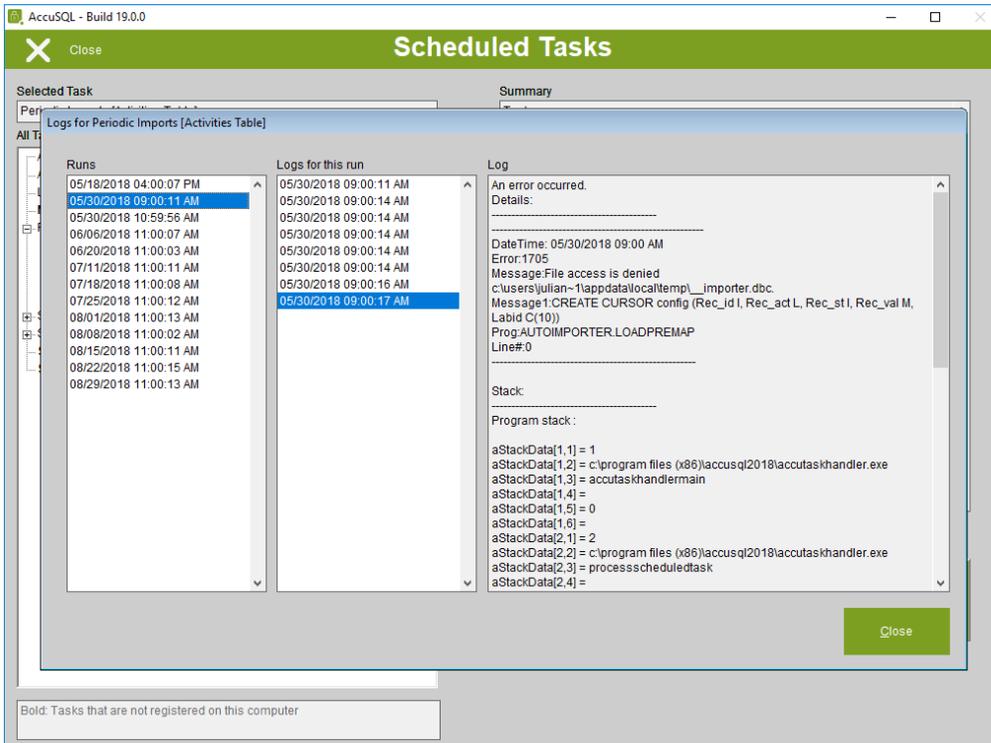
Click on the **Logs of this Schedule** button to look at past and current logs for that specific task.



The Logs show all the steps of that particular task all the way to completion:



If the task errors out, then the log will provide you with the step where the error occurred and an error message to troubleshoot.



SYSTEM SETUP OPTIONS

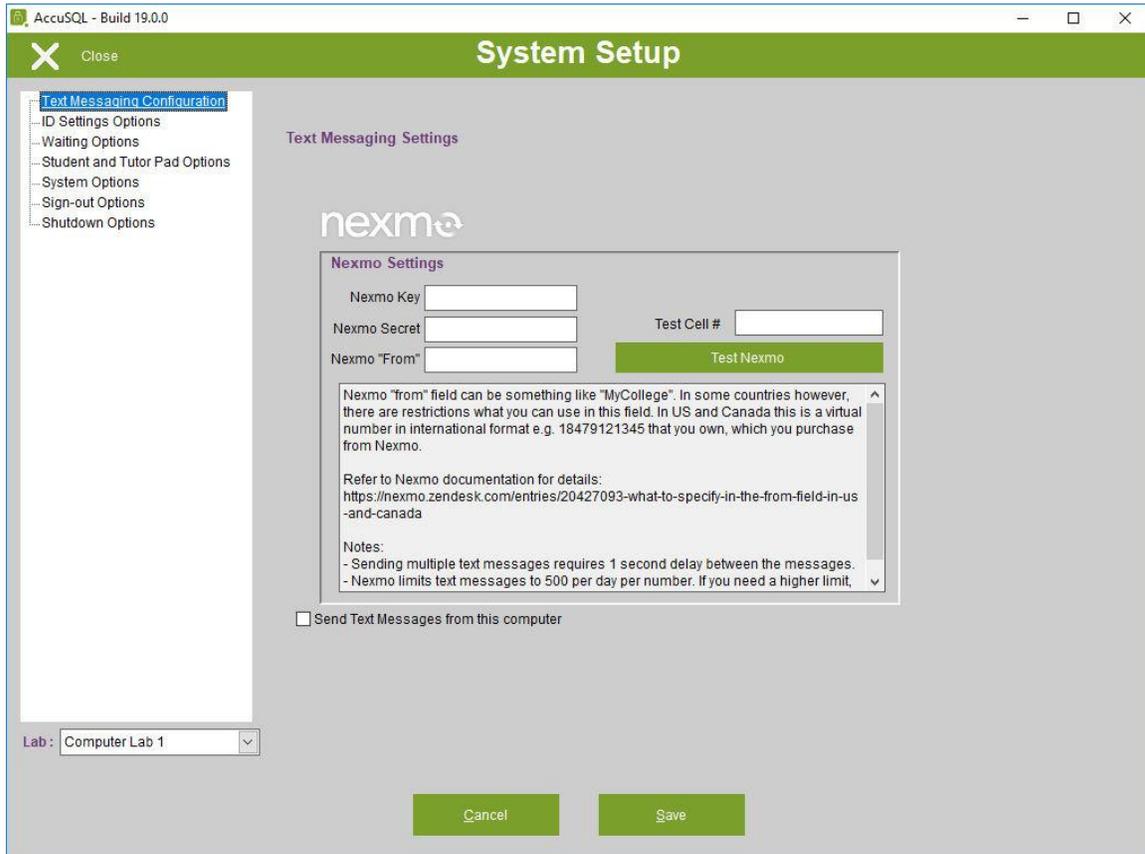
If you click System from the main System Administration screen, then select Setup, you will be presented with a System Setup Options view that shows context specific options for your System screens.

Here are the Control Panel options for System Setup:

- Test Messaging Configuration – Used to setup the text messaging information that will be used to send text messages in AccuSQL/AccuTrack.
- ID Settings Options – Used to setup the ID length and mask parameters for the people that will be logging into AccuSQL/AccuTrack, either as students, tutors, or administrators.
- Waiting Options – Used to enable either an intake queue or an activity waiting list in AccuSQL/AccuTrack. Using these methods, students sign in and then are placed in a waiting queue until they are ready to be seen by available staff.
- Student and Tutor Pad Options – Used to display or hide the Student and Tutor Pad buttons on the main sign in screen.
- System Options – Used to configure software updates, startup settings, and various system display settings.
- Sign-out Options – Used to setup rules for log in display statistics, and how to handle students that forget to sign out.
- Shutdown Options – Used to setup rules that run at for system shutdown.

TEXT MESSAGING CONFIGURATION

To access Text Messaging Options , click System in System Administration, then the Setup tab. On the left side of the screen, click Text Messaging Configuration.



AccuSQL/AccuTrack can utilize text messaging in several ways:

- To send appointment reminders texts to students.
- To send text messages to students and tutors via the Messaging Center.
- To send text messages to students from the intake system or the activity waiting list.

Use this screen to setup the service you are using to deliver text messages to your students and tutors.

Due to its, reliability, affordability, and secure transmission protocol, we use Nexmo services. When you create an account with this provider, you will be given the access information you will need to enter into the SMS Configuration screen. To find out more you can visit www.nexmo.com.

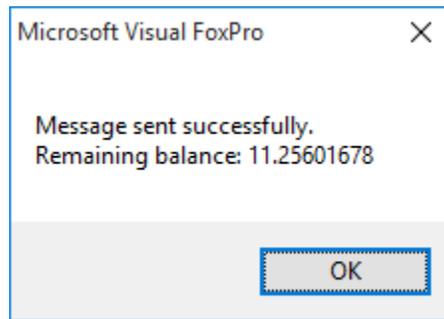
If you intend to enable text messaging right away, select the Send Text Messages from this computer to enable the messaging and click Save.

Send Text Messages from this computer

TESTING NEXMO

After you enter the Nexmo Key, Nexmo Secret, and Nexmo From information (provided by Nexmo after you have created a valid account) you can enter your own cell number (make sure to add a 1 in front of it) to test the messaging.

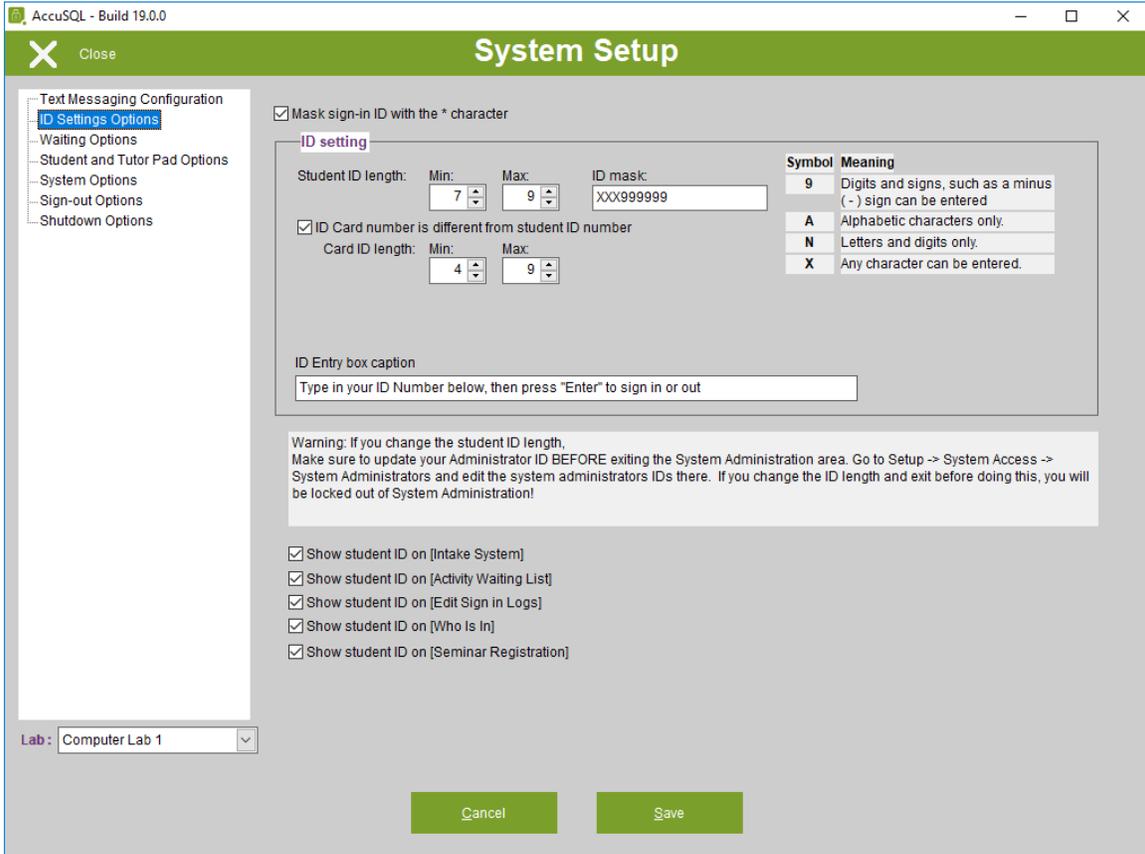
After you click Test Nexmo, you should see a pop-up message indicating the message was sent and you should also get a test message on your phone for the number you entered.



If you get a different message, check your Nexmo settings and retry. You may also want to check with IT to make sure there is no security or firewall policy in place that will prevent the outbound SMS traffic.

ID SETTINGS OPTIONS

To access ID Settings Options , click System in System Administration, then the Setup tab. On the left side of the screen, click ID Settings Options.



Use the ID Setting box to set up the format of the sign-in ID in AccuSQL/AccuTrack. AccuSQL/AccuTrack even allows you have variable ID length – from 4 up to 40 characters long. With this powerful feature your sign-in ID can even be an email address.

To specify the format of the sign-in ID, start by setting the minimum and maximum allowable ID length. For example, if your student ID can be 5, 6, or 7 digits long, then set the minimum to 5 and the maximum to 7. On the other hand, if your ID length is fixed, then set both the minimum and maximum to the same value.

Next you will need to set the student ID mask. The mask is useful in controlling the ID entry.

Here are the accepted symbols for the input mask:

Symbol	Meaning
9	Digits and signs, such as a minus (-) sign can be entered
A	Alphabetic characters only.
N	Letters and digits only.
X	Any character can be entered.

In addition to specifying the type of the input character, you can also use special symbols like ‘-’ and ‘(’. These characters serve as a separator and are not recorded as part of the sign-in ID itself. For example, the mask of the social security number format is “999-99-9999”.

AccuSQL/AccuTrack also allows you to use two IDs per student. This is useful for example if you want students to sign in with either a card ID number or a student ID number. They can swipe their ID cards to sign in with their college ID card, or they can type their student number if they forget their ID card. This screen allows you to configure the format of both IDs to match the ones you use at your center.

ID Card number is different from student ID number: If you want to use two different IDs per student, check this box. On the other hand, if you only want to use a student ID number, clear this box.

Card ID length: If you check the above box, enter the minimum and maximum number of characters of the card ID using this spinner box. Minimum value is 4 and maximum value is 40.

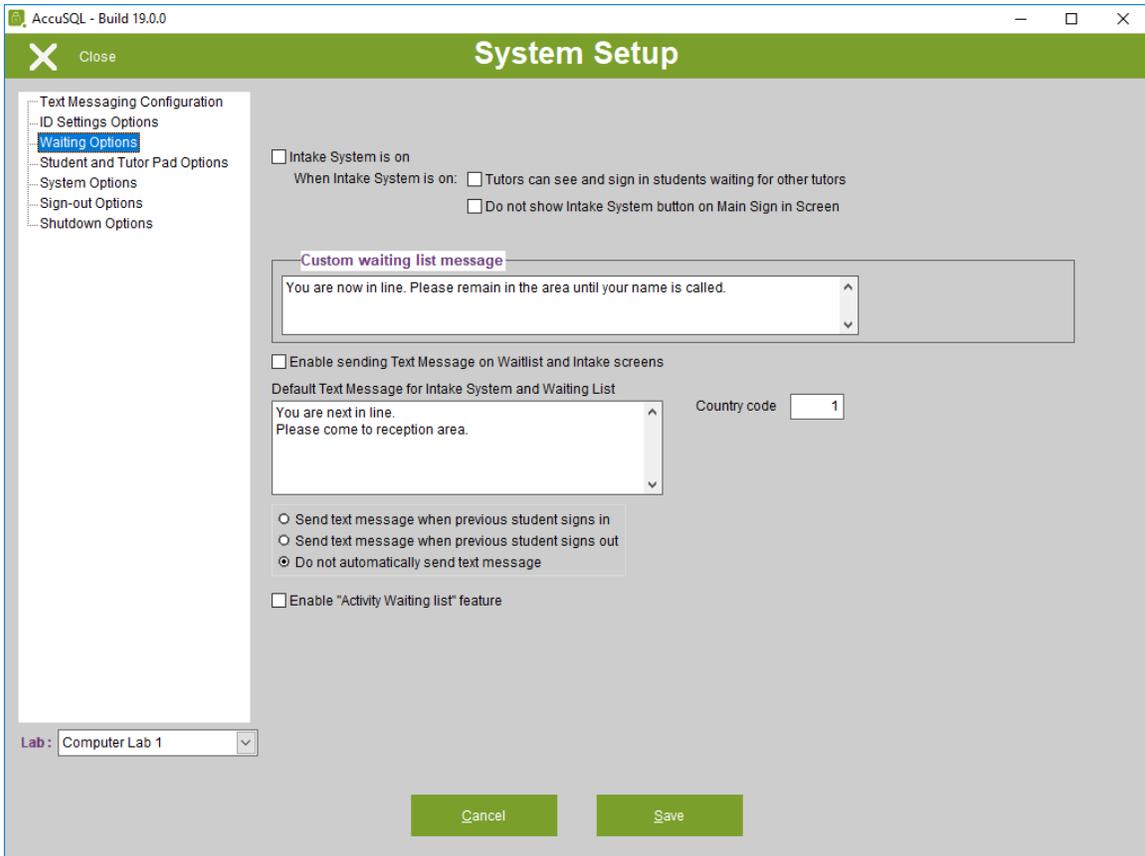
ID Entry box caption: Use this box if you want to change the instruction line above the ID Entry box. This will enable you to give the visitors specific instructions on which ID number to use.

Show student ID on X: Check these boxes to display the student ID on the various screen indicated.

 **Warning:** If you change your ID setting, you must make sure that your Root administrator’s ID matches that format or you will lock yourself out of AccuSQL/AccuTrack. When you change the format, a warning message will be displayed. Make sure you go to the Users >> System Administrators screen and update your system administrators’ IDs to match those in your ID Settings.

WAITING OPTIONS

To access Waiting Options , click System in System Administration, then the Setup tab. On the left side of the screen, click Waiting Options.



Intake System is on: Check this box if you want to enable the intake system for student sign ins. Using this feature, students are put in the waiting list at sign in and then can be signed in by either tutors or administrators when they are ready to be seen.

When Intake System is on Tutors can see and sign in students waiting for other tutors: Check this box if you want tutors to see students waiting for all other tutors. If left unchecked, tutors will only see students waiting for them.

Do not show Intake System button on Main Sign in Screen: Check this box if you want to hide the Intake System button from the main sign in screen. This can be useful if students are signing into sensitive activities and you do not want students to see what other students are waiting for.

Custom waiting list message: Enter the message students will see after they sign in to indicate to them they are now on the waiting list (if Intake System is set to on).

Enable sending Text Message on Waitlist and Intake screens: Check this box if you want students to get a text message when they are signed in from either the Intake Queue or the Activity Waiting List. Text Messaging is setup in the Communications >> Setup >> Text Messaging Configuration screen.

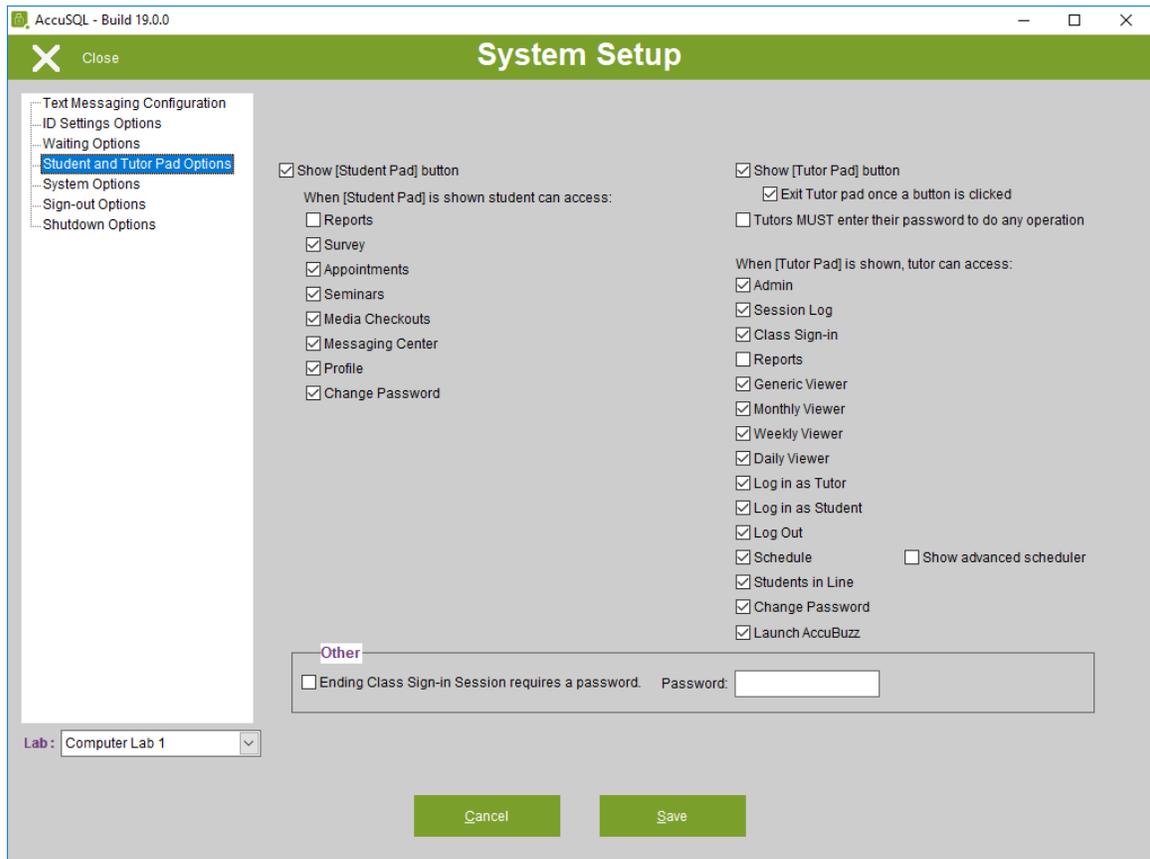
Country Code: Leave set to 1 if you are in the U.S or Canada. If on another country, enter the dialing code for that country.

Default Text Message on Intake System and Waiting List screens: Enter the text message that you want to send to students when they are ready to be signed in from the Intake System or Activity Waiting List. If you select this option, then click the radio button for when you want that message delivered.

Enable Activity Waiting List feature: Check this box if you want to turn on the Activity Waiting List for student sign ins. Remember, the Activity Waiting List controls the maximum number of students that can be signed into a particular activity at the same time. This can be done on a per activity basis.

STUDENT AND TUTOR PAD OPTIONS

To access Student and Tutor Pad Options , click System in System Administration, then the Setup tab. On the left side of the screen, click Student and Tutor Pad Options.



The Student and Tutors Pads can appear on the main sign in screen if you so desire by clicking the Show Student Pad button and/or Show Tutor Pad button. When students and tutors sign in, they will have

access to the options you select. **Note:** When a tutor signs in, they will automatically be presented with the Tutor Pad options you select.

The *Student Pad* has the following buttons:

- **Show Student Pad button:** Click to display the Student Pad on the main sign in screen.
- **Reports:** Allows students to view reports for their visits and appointments.
- **Survey:** Click to allow students to fill out any custom surveys you have defined and published.
- **Appointments:** Click to allow student to create, view, or cancel appointments.
- **Seminars:** Click to allow students to register for seminars.
- **Media Checkouts:** Click to allows students to check out and return media items.
- **Messaging Center:** Click to allow students to send messages via AccuSQL/AccuTrack or email to tutors.
- **Profile:** Click to allow student to update their information on their student record.
- **Change Password:** Click to allow students to change their password. Passwords are used to access the Student Pad and also when scheduling appointments via Web Gateway.

The *Tutor Pad* has the following buttons:

- **Show Tutor Pad button:** Click to display the Tutor Pad on the main sign in screen.
- **Exit Tutor pad once a button is clicked:** If checked, the Tutor Pad will close after the tutor selects an option.
- **Tutors Must enter their passwords to do any operation:** If clicked tutors will be required to enter a password to access the Tutor Pad options.
- **Admin:** If the admin gives the tutor access to the administration screen, this button will be enabled. Clicking on it will take the tutor to the System Administration screens they are allowed to access based on the Tutors Access Group options you have enabled.
- **Session Log:** Click to allow tutors to launch the Session Log screen where tutors enter notes and fill out session questionnaires for the tutoring sessions.
- **Class Sign-in:** Click to enable class sign-in sessions.
- **Reports:** Allows tutor to generate reports as determined by the Reports Access for the Tutors access group.
- **Generic Viewer:** Click to allow tutors to launch a generic appointment viewer.
- **Monthly Viewer:** Click to allow tutors to launch a monthly appointment viewer.
- **Weekly Viewer:** Click to allow tutors to launch a weekly appointment viewer.
- **Daily Viewer:** Click to allow tutors to launch a daily appointment viewer.
- **Log in as Tutor:** Click to allow tutors to sign in as a tutor so you can track their work hours.
- **Log in as Student:** If the tutor is also entered as a student, click to allow the tutor to sign in as a student.
- **Log Out:** Click to allow tutors to sign out from the Tutor Pad.
- **Schedule:** Click to allow tutors to display their schedules and allow them to create their own custom schedules.
- **Students in Line:** If Intake System is turned on and admin allows it, click to allow tutors to see students waiting to see them and to sign the students in.

- **Change Password:** Click to allow tutors to change their password.
- **Launch AccuBuzz:** Click to allow tutors to receive alerts at their computers when a student signs in to see them or is placed in the Intake System. The alerts appear as pop-up boxes from their windows taskbar. Note: The AccuBuzz program runs external to AccuSQL/AccuTrack.
- **Ending Class Sign-in Session requires a password:** Click and then enter the password that tutors must enter (case sensitive) to end a Class Sign in. This option is used to prevent students from ending the class sign in session prematurely.

SYSTEM OPTIONS

To access Systems Options , click System in System Administration, then the Setup tab. On the left side of the screen, click System Options.

Software Version Auto Update

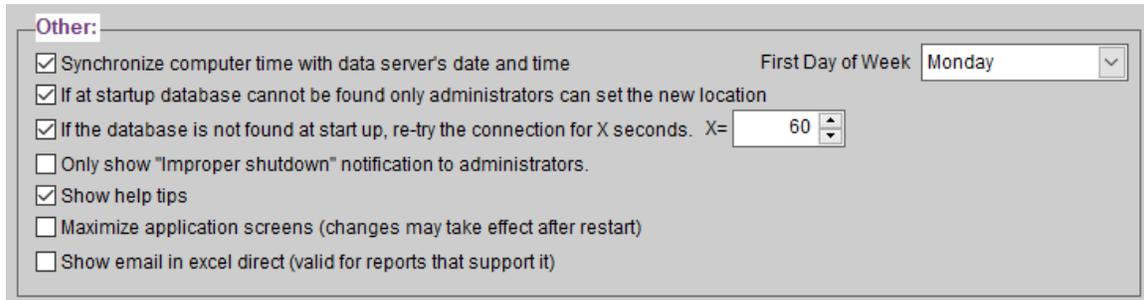
If the Application auto update is enabled box is checked, AccuSQL/AccuTrack will periodically check for free maintenance upgrades via the Internet. If a maintenance upgrade is found, AccuSQL/AccuTrack will ask whether you want to download it. Click on “Yes” to download and upgrade your software.

 **Note:** We strongly recommend that you turn auto update on. This will keep your software up-to-date with the latest fixes and enhancements.

When AccuSQL/AccuTrack downloads the upgrade, it will place a copy of it in a common folder (same folder that has your application shared path). The path and name of this folder appears in the screenshot above. This is useful in shared network installation because only one of the AccuSQL/AccuTrack installations needs to download the update file. It will then place a copy in the common update folder, and the other installations will update themselves with this file instead of downloading it again.

Note: If you have not created and UPDATES folder in the application shared path, then we recommend you do so. AccuSQL/AccuTrack will attempt to create the folder when updates are downloaded, but may fail if you have not created the folder first.

Other:



Synchronize computer time with the data server’s date and time: This option is useful in shared network installations. If checked, AccuSQL/AccuTrack will update the clock of the computer it’s running on by synchronizing it with the date and time of the server.

First Day of the Week: Use this option to select your first day of the week. This selection is used for some of the reports and when calculating the sign-out statistics (yellow box).

If at startup the database cannot be found, only the administrator can set the new location: Check this option if you want to password-protect the ability to change the database location from the sign-in computers. **Note:** This option does not apply to AccuSQL/AccuTrack.

If the database is not found at start-up, re-try the connection for X seconds: Check this option to re-try connection to a database for a specified (X) number of seconds if it cannot be found upon start up.

Only show the “Improper” shutdown notification to administrators: Check this option if you want to display the “Improper Shutdown” message to administrators only. If this option is not checked, the “Improper Shutdown” message will be shown at launch.

Show help tips: Help tips appear when you leave the mouse pointer on a control for a few seconds.

Maximize application screens: Click if you want to maximize the Administration screens in AccuSQL/AccuTrack. **Note:** The main sign in screen is maximized by clicking the “Run in Kiosk mode” checkbox in the Sign-in Setup >> Setup >> Welcome Screen Options on a per machine basis.

Use Positive Hours: Accept X minutes as 1 hour: This option was added at the request of colleges in California. These colleges count student attendance in *positive* hours. A positive hour is defined as 50 minutes of attendance time. However, AccuSQL/AccuTrack allows you to define the positive hours in different actual minutes too using the spinner box. If you want to use actual hours for student attendance, uncheck this box. **Note:** If this option is on, positive hours are shown in reports and when students sign out.

Show “Tip of the day” on this station during startup: Check to display a random usage tip when AccuSQL/AccuTrack starts.

This station is an Information Only Station: Check if you do not want students or tutors to sign in from this computer. If you have a computer running AccuSQL/AccuTrack that want to dedicate to appointment

scheduling, or media checkouts, for example, you could check box to allow for those options but not allows sign ins. If student or tutors try to sign in and this box is checked, they will receive a message indicating that the computer is designated as an "information only" terminal.

BACKGROUND IMAGE

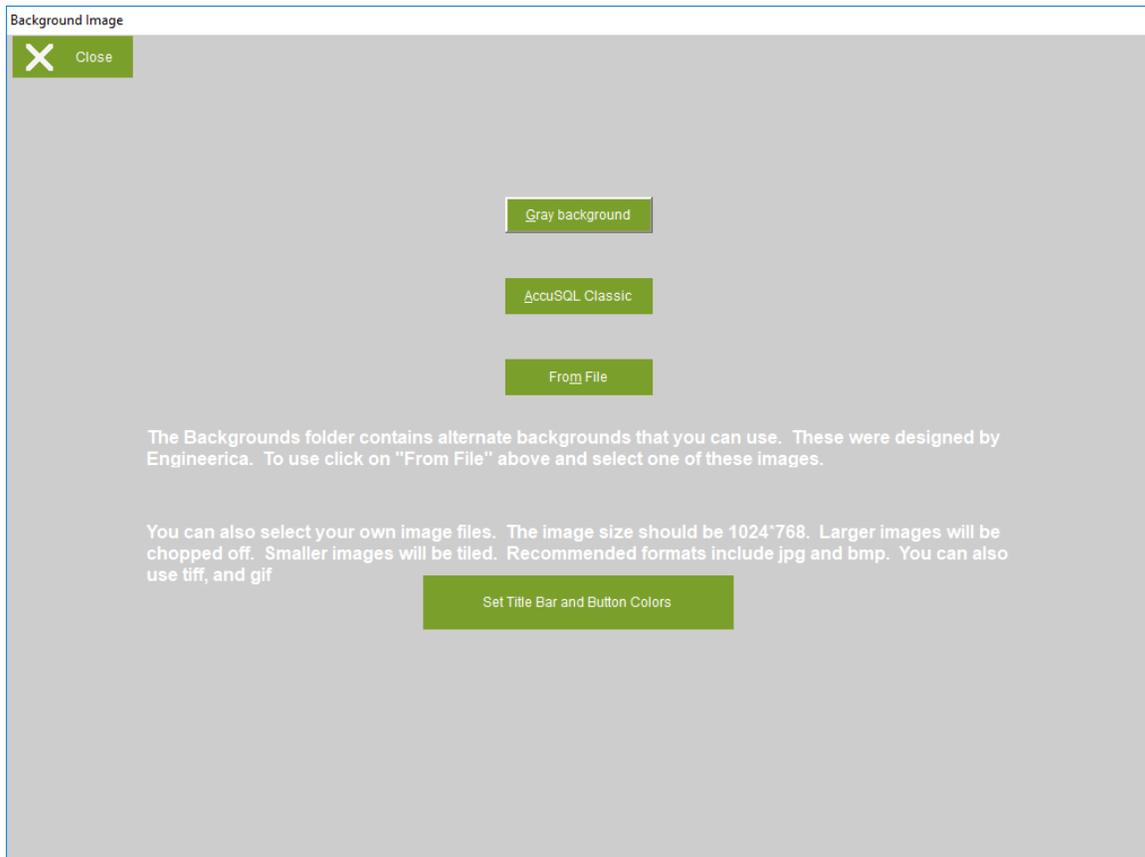
Click this button if you want to change the background image for the AccuSQL/AccuTrack screens. There are 3 options available:

1. **Gray background: (recommended):** Clicking this option uses the default graphical background from AccuSQL/AccuTrack screens.
2. **AccuSQL/AccuTrack Classic** This option loads the default AccuSQL/AccuTrack12 background.
3. **From File:** This option allows you to browse and select an image file for the background. This allows you to customize the background to your liking.

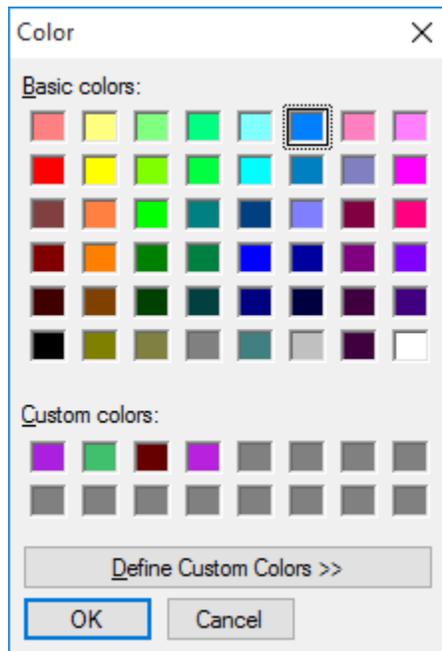
If you change the background, make sure you click on "Save" in the System Setup screen.

SET TITLE BAR AND BUTTON COLORS

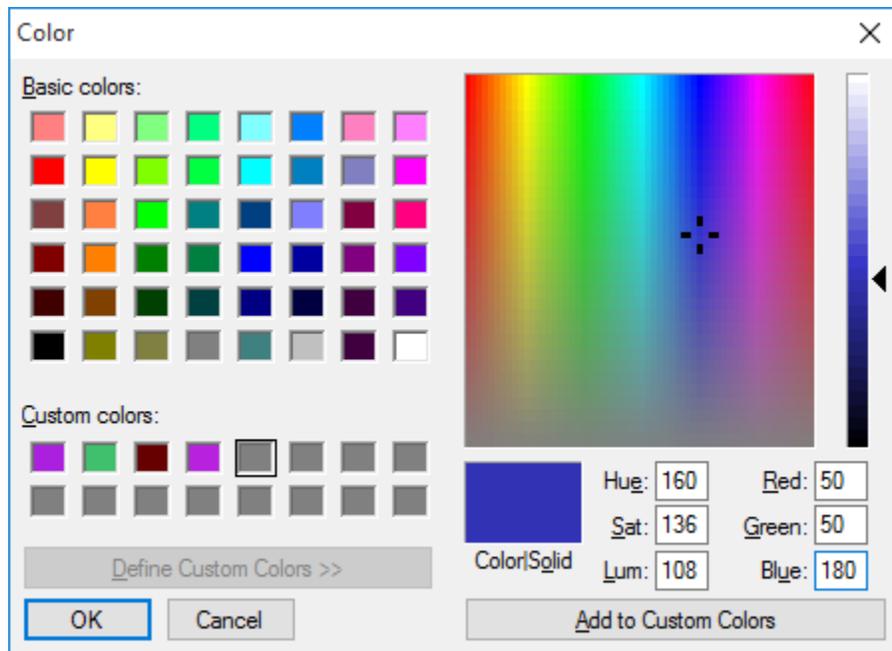
Click on Background Image, then click the Set Title Bar and Button Colors button to change the title bar and buttons colors in AccuSQL or AccuTrack 2019.



First click Choose Color to select the color you want to use. You can either select a Basic Color



Or click the Define Custom Colors button to either drag the crosshair pointer to a color, or use HSL, or RGB color values:



Based on the color you select, you will see a preview of the title bar and buttons in the screen. You then have the option to Keep this color setting or revert it:



Click Keep this color setting and the screen will close automatically. Now click Close again in the Background Image screen and then Save and the bottom of System Setup. Finally, click Return to Sign-in screen to see your changes.

Welcome

Welcome to the Computer Lab 1



Please Sign In Before Using Any of the Computers!!

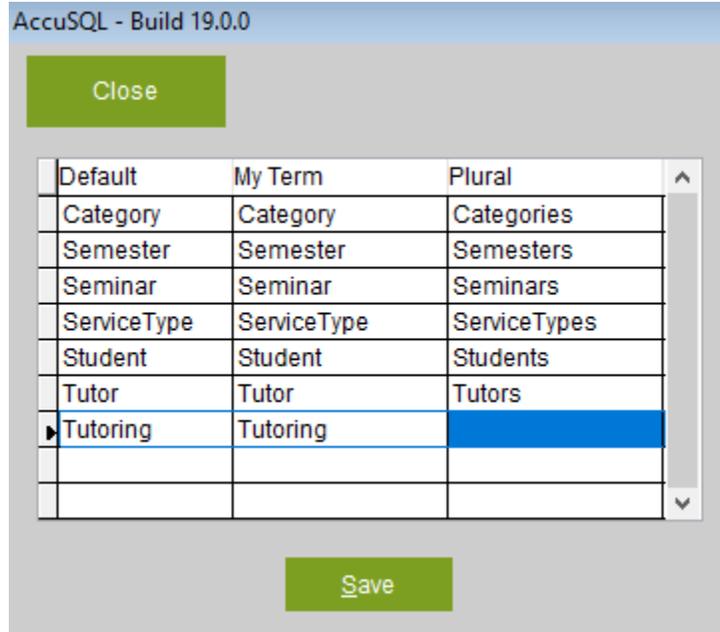
Tutoring Center Hours: M-F 7am to 6pm

No Food or Drink Inside the Center PLEASE

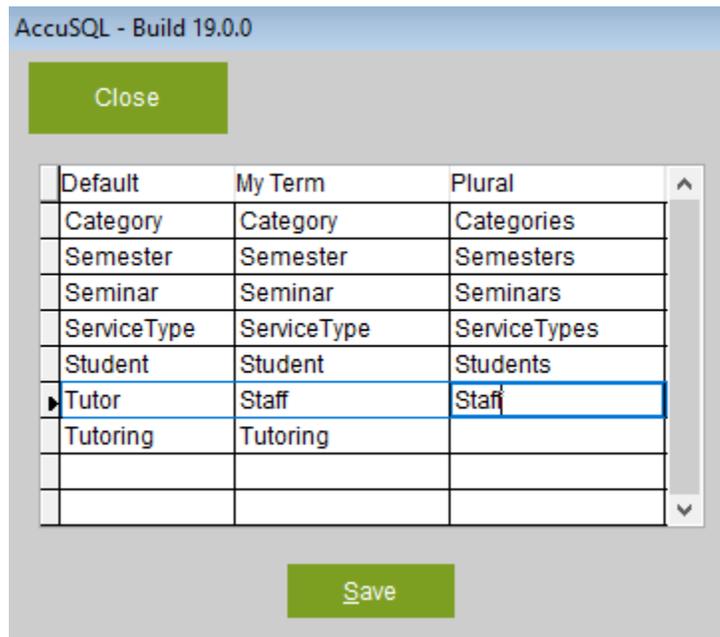
Type in your ID Number below, then press "Enter" to sign in or out

TERMINOLOGY

Click the Terminology button if you want to change the terms used in AccuSQL/AccuTrack:



When you first open the Terminology screen, it will automatically display the last items in the grid. Click the up arrow on the right to see more items you can change:



You can change the following terms: Activity, Student, Tutor, Service Type, Tutoring, Seminar, and Semester. For example, if you were using the software in an advising center, you might want to change

“Student” to “Client”, “Tutor” to “Advisor”, Activity to “Service” and “Tutoring” to “Advising”. You can also change “Seminar” to “Workshop” and “Semester” to “Quarter”.

If you change a term, your defined term will appear in the AccuSQL/AccuTrack screen, in application messages, and on the reports.

Note: If you change the Lab drop-down box in the lower-left of the main System Setup screen to a different Local Lab, you can create different terminology for different labs!

SIGN-OUT OPTIONS

To access Sign Out Options , click System in System Administration, then the Setup tab. On the left side of the screen, click Sign-out Options.

Sign-out statistics times out in X seconds: Use the spinner box to indicate how many seconds the yellow statistics box will be displayed. Note that if a key is hit or the mouse is clicked, the box will immediately disappear even if this time did not pass yet.

Show totals for the week: Check this option if you want the student to see their total hours for the week at sign out.

Show totals for the semester: Check this option if you want the students to see their total hours for the semester at sign out.

Sign-out statistics font size: Use the spinner box to determine the size of the font that will be used to display the sign out statistics.

Warn if sign-in period exceeds: Check this box if you want to display a warning message when the student's sign-in period exceeds a certain period. If selected, enter the max period in hours and fractions of hours in the text box.

Warning message: If you checked the box above, then enter the warning message that will be displayed when the maximum sign-in period is exceeded.

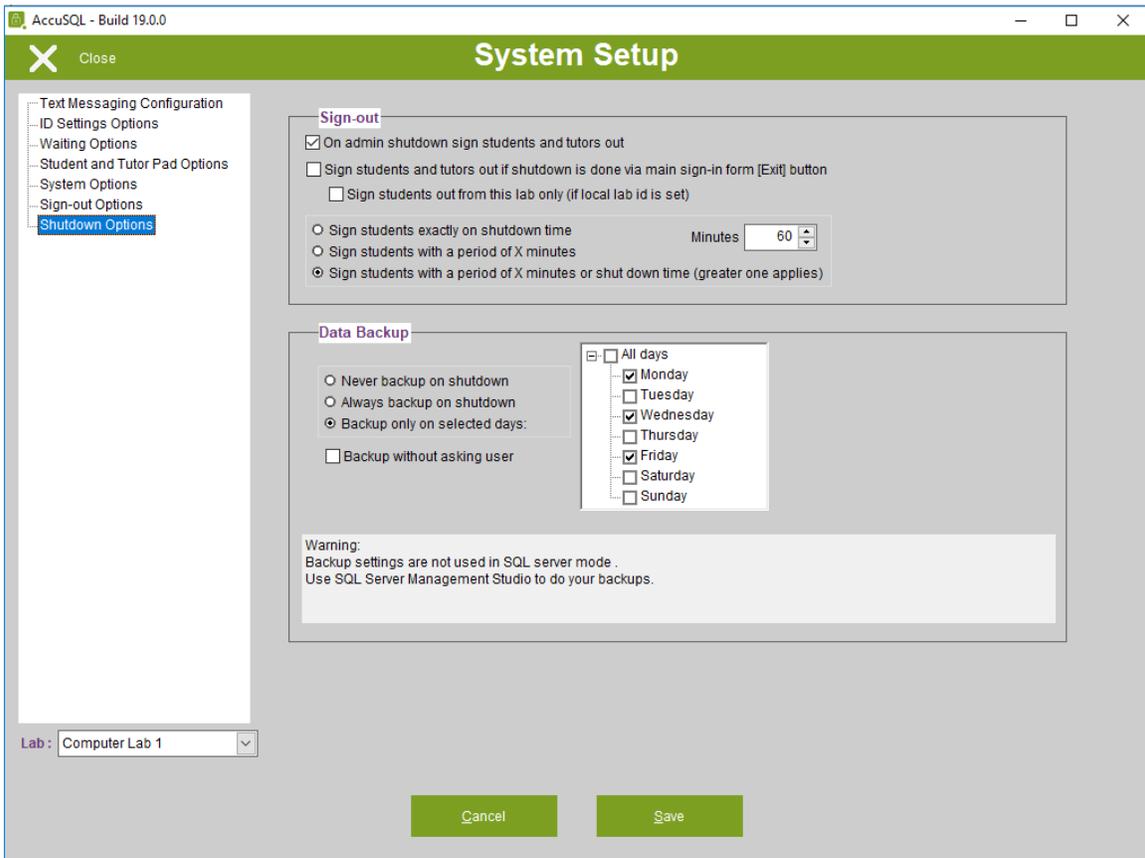
Use a maximum sign-in period: Check this box if you want to enter a maximum sign-in period for students. If selected, enter the max period in hours and fractions of hours in the text box. You can specify the action when this maximum is exceeded via one of the three radio buttons:

- **Sign student with X hour period:** Choose this option if you want students who exceed the maximum sign-in period to get signed out with X sign-in period. Set X to whatever you like using the X= spinner box.
- **Ask student how long he stayed at the next visit:** Choose this option to have AccuSQL/AccuTrack ask the student at the next visit to enter the sign-in period for the previous visit in which the maximum sign-in period was exceeded.
- **Lock student out and only allow admin to sign her in:** Choose this option for maximum control over the accuracy of the sign-in records. With this option selected, when a student exceeds the maximum sign-in period AccuSQL/AccuTrack will lock him or her out. To unlock the record, the student must be signed out via the Student Visits Tracking >> Sign out screen.

Use a minimum sign-in period: Check this box if you want to enter a minimum sign-in period for students. If they try to sign out before the minimum is reached, they will receive a warning message.

SHUTDOWN OPTIONS

To access Shutdown Options, click System in System Administration, then the Setup tab. On the left side of the screen, click Shutdown Options. Use this page to indicate actions to take when you exit AccuSQL/AccuTrack. These options include auto sign-out at exit and database backup.



Sign Out

On admin shutdown sign students and tutors out: If this feature is selected, when you exit AccuSQL/AccuTrack the software will ask whether you want to sign out any students or tutors who are still signed in.

Sign students and tutors out if shutdown is done via main sign-in form Exit button: Use this checkbox if you want AccuSQL/AccuTrack to check for sign-outs when the Exit button is pressed from the main sign in screen.

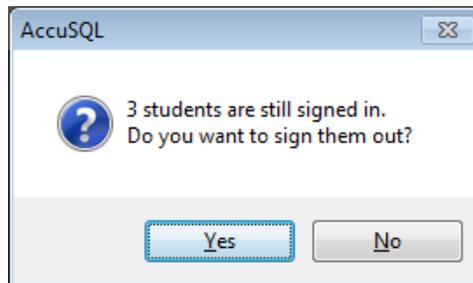
Sign students out from this lab only (of local lab is set): If you enable sign outs on shutdown, you can also indicate whether AccuSQL/AccuTrack should sign out all students and tutors in all the labs (if shared lab installation) or only sign out students and tutors who signed in this lab.

If you enable either one of the above options, you can also specify how the sign-out time is calculated with auto sign-out:

Sign students exactly on shutdown time Minutes
 Sign students with a period of X minutes
 Sign students with a period of X minutes or shut down time (greater one applies)

- Use the first option if you want the time of the shutdown to be used as the sign-out time.
- Use the second option if you want to give each signed in person a certain sign-in period. The sign-in period is entered in minutes using the spinner box on the right.
- Use the third box if you want the greater of the sign-in period or shutdown time to be used for the sign-out.

If auto sign-out is turned on, AccuSQL/AccuTrack will check if any students or tutors are still signed in when you click on the "Exit" button. If so, you will see a message box:



Click on yes to automatically sign out the students and tutors who are still signed in using the rules you selected in the Options page.

Data Backup

In AccuSQL all backups are handled in MSSQL Server. It is important that you verify with your MSSQLServer administrator that database backups are scheduled regularly for your database. For AccuTrack, you can set the backup schedule here.

Important: Back up your data often. It is always better to be safe than sorry!

ADD-ONS SCREEN

When you click on Add-ons from the Main Menu, you will see the following options:

- **Computer Lab Status:** Use to view the computers that have connected to AccuSQL/AccuTrack.
- **AccuWB:** Allows you to access the AccuSQL/AccuTrack Whiteboard used for online meetings and collaboration.
- **Time Clock:** Allows you to setup and then download or upload data using the AccuSQL/AccuTrack time clock.

COMPUTER LAB STATUS- TEST

Purpose: Shows computers running the Computer Lab Plug in software.

Access: From System Administration, click on Add-ons >> Computer Lab Status.

CL	Computer Name	Location	In use by	Since	Available
No	DESKTOP-B4674Q8		Admin - Supreme King	08/23/2018 05:32 PM	No
No	DESKTOP-ERGEV87		Admin - Supreme King	12/07/2018 02:19 PM	No
No	ESI-PC		Admin - Supreme King	03/05/2018 06:47 PM	No
No	HP-DESKTOP-NICK		Admin - Supreme King	02/26/2018 04:38 PM	No
No	LAPTOP-KMGF9Q24		Admin - Supreme King	11/09/2018 12:23 PM	No
No	DESKTOP-70P58D3	Computer Lab 1	Admin - Supreme King	12/20/2018 12:58 PM	No
No	HP-STREAM	Library		08/06/2018 08:49 AM	Yes
No	OFFICE3B-PC	Tutoring Center	Admin - Supreme King	02/23/2018 09:20 AM	No

This screen shows all computers that are currently signed into AccuSQL/AccuTrack and/or the various computer labs and the computers that are available (meaning they are running AccuSQL/AccuTrack, but no one is currently logged in).

CL: If Yes, indicates the computer listed is running the ComputerLab Plugin software. If No, computer is running AccuSQL/AccuTrack itself.

Computer Name: The name of the computer accessing either the Plugin or AccuSQL/AccuTrack.

Location: If the location is blank, it indicates the user is (or was) connected to the “Default All” local lab, else the location will show the local lab to which the user is (or was) connected.

In use by: The AccuSQL/AccuTrack user (student, tutor, or admin) that accessed either the ComputerLab or AccuSQL/AccuTrack.

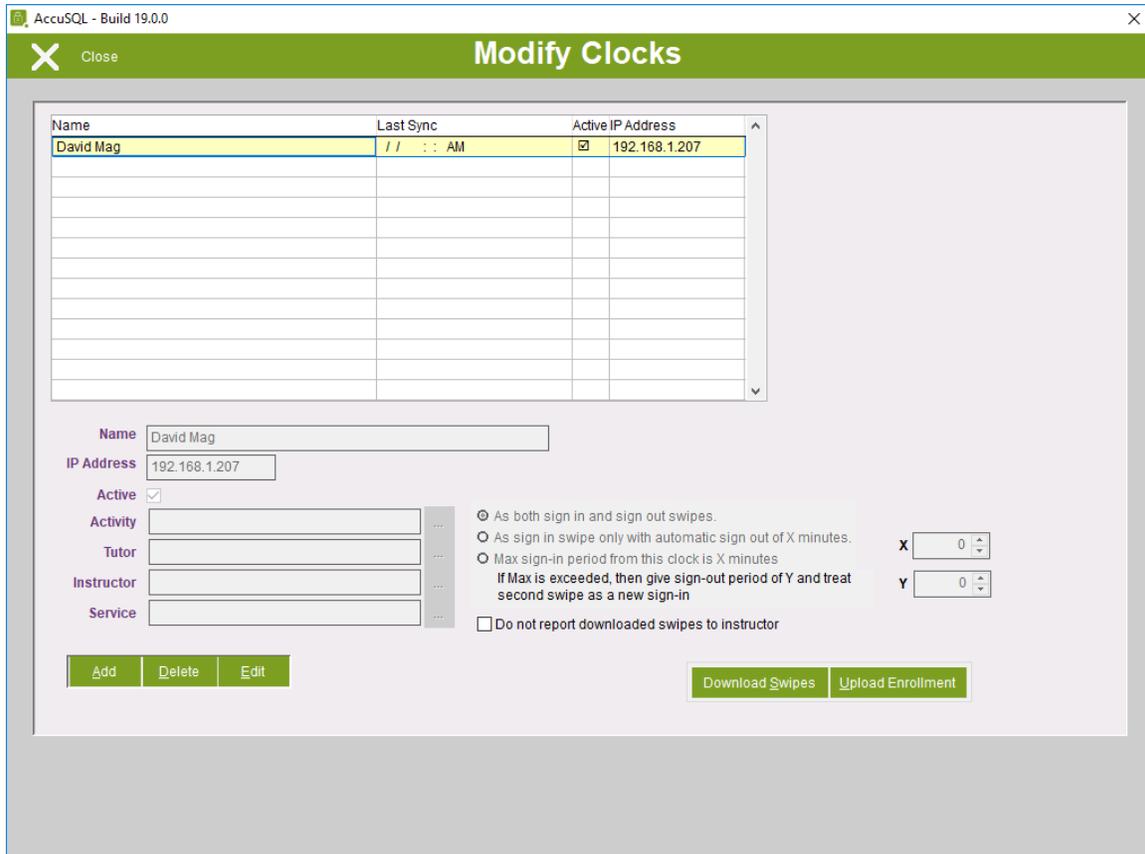
Since: Shows the last login for the Computer Name indicated.

Available: If Yes, the computer indicated is available for sign ins. If No, the computer is currently sign into by either a student, tutor (if AccuSQL/AccuTrack), or an admin

TIME CLOCK

Purpose: Used to download swipes from or upload enrollment to the AccuSQL/AccuTrack Time Clock device.

Access: From System Administration, click on Add-ons >> Time Clock.



Click Add to create a new clock entry or Edit to change the settings.

Name: Create a unique name for the clock.

IP Address: Each clock will have a unique IP address that you can assign to the device itself. Enter the IP address for the clock you are creating.

Active: Click this box if you want the device activated for use.

Activity: If you want the swipes from the clock to be associated with a particular activity (class) click the ... button and select the activity. Note: If you do not select an activity you will only be downloading the sign in and/or sign-out times.

Tutor: If you want the swipes from the clock to be associated with a particular tutor, click the ... button and select the tutor.

Instructor: If you want the swipes from the clock to be associated with a particular instructor, click the ... button and select the instructor.

Service: If you want the swipes from the clock to be associated with a particular Service Type, click the ... button and select the service.

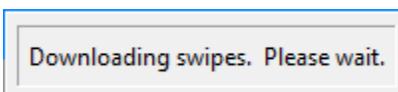
As both sign in and out swipes: If you want the students to both sign in and sign out from Time Clock, select this option to download both the sign in and sign out time. This option is used if you collect sign-ins when a session starts and sign outs when it ends.

As sign in swipe only with automatic sign out of X minutes: If you are only collecting sign ins from the clock, select this option and then enter the time you want to credit for the session in the X box. The value you enter is in minutes, so 60, for example, would equal 1 hour.

Max sign-in period from the clock is X minutes: If you want to use the sign in period to determine the credited period, check this box. Enter the max sign in period in the X box in minutes and then enter the period that will be assigned if the max is reached in the Y box. For example, if you have X set to 180 (3 hours) and Y set to 120 (2 hours), then the sign ins that exceeded 3 hours would be given credit for 2 hours. If a sign in and sign out from the clock does not exceed the maximum, then the actual sign in/sign out period will be used. So 3 hours would be given 2 hours in this case and 2.5 hours would be given 2.5 hours.

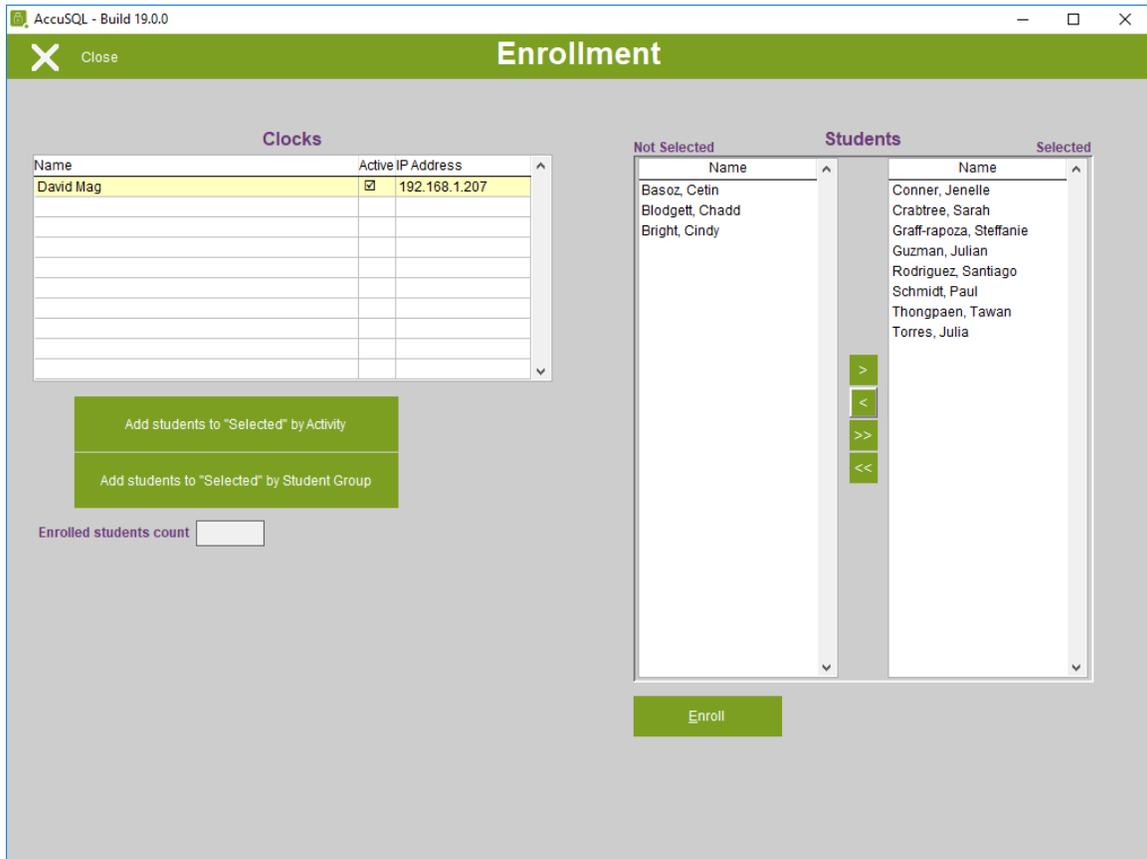
Do not report downloaded swipes to instructor: Check this box (in non-edit or Add mode) if you do not want the session reported to the instructor for the scheduled instructor attendance reports.

Download Swipes: Click this button to download the sign ins and/or sign out from the clock into AccuSQL/AccuTrack. After the process completes, the students will be credited for the time you have specified for the activity, tutor, instructor, and/or Service you have specified. While AccuSQL/AccuTrack is actively downloading swipes, you will see a small box at the top of your screen indicating the upload is in progress or when it has completed. You can continue working normally while the messages are being displayed.



Note: you can see the results of the download in the Students Visits Tracking >> Edit Sign in Logs screen.

Upload Enrollment: Click this button to upload the students who are registered for the activity (class) you have specified. **Note:** Students are registered for activities using the Sign-in Setup >> Registration screen or via imports.



Note: You can [find out more about the Time Clock](#) on our Website.

ADD-ONS SETUP OPTIONS

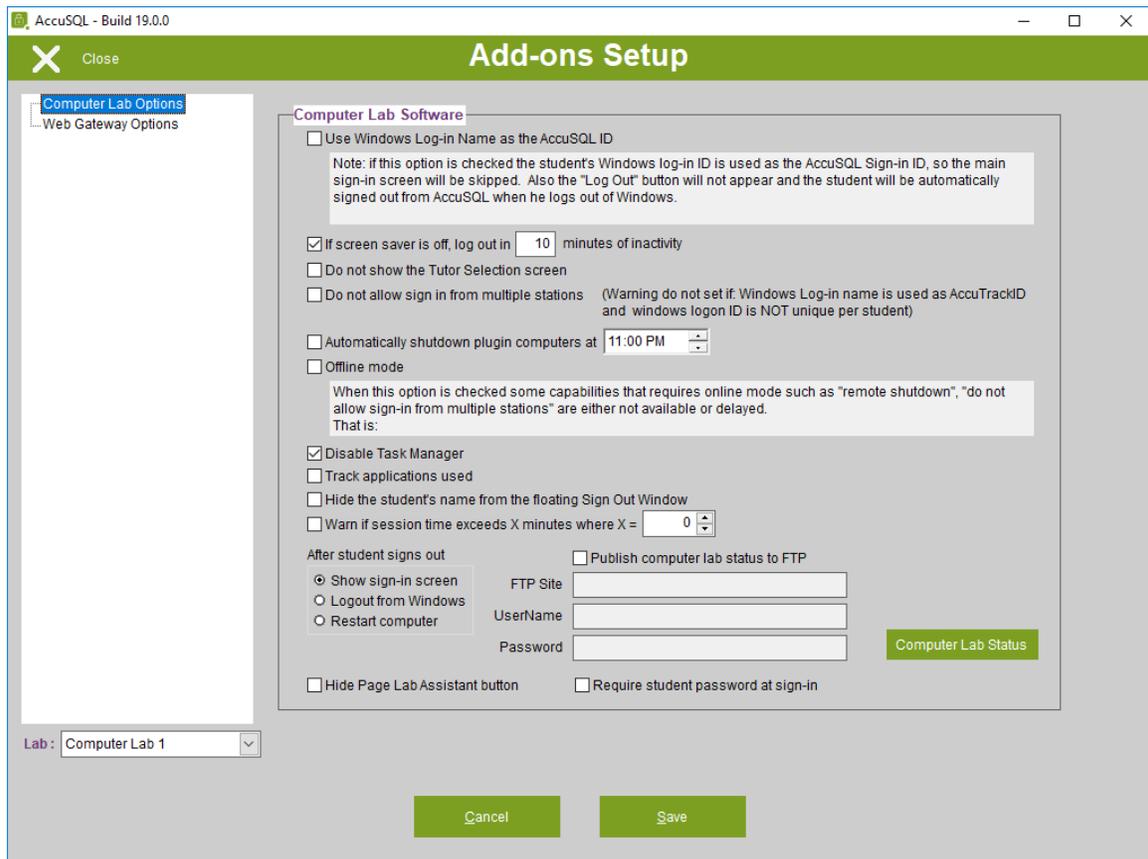
If you click Add-ons from the main System Administration screen, then select Setup, you will be presented with an Add-ons Setup Options view that shows context specific options for your Add-ons screens.

Here are the Control Panel options for Add-ons Setup:

- **Computer Lab Plug-in Options:** Used to setup the AccuSQL/AccuTrack ComputerLab Plugin software options.
- **Web Gateway Options:** Used to setup rules for the Web Gateway MVC module.

COMPUTER LAB PLUG-IN OPTIONS

To access the Computer Lab Plug-in Setup options, click Add-ons in System Administration, then the Setup tab in the bottom right of the screen. Now click on Computer Lab Plug-in Options on the left side of the Options menu to select it.



Use Windows Log-in Name as the AccuSQL/AccuTrack (ComputerLab Plug-in ID): Check this option if students using your computers must sign in to a Windows log-in account first. Instead of having these students log in twice (first to Windows and then to the ComputerLab Plug-in), you can check this option and AccuSQL/AccuTrack will automatically read the Windows log-in ID and sign the student in to ComputerLab Plug-in using this ID. Note that if this option is checked, the ComputerLab Plug-in will sign the student out when the student signs out of Windows.

If screen saver is off, log out in X minutes of inactivity: With this option checked, the ComputerLab Plug-in will sign the student out automatically if X number of minutes pass without activity. Note: If the screen saver is activated, the Plug-in software will sign the student out after the screen saver activates.

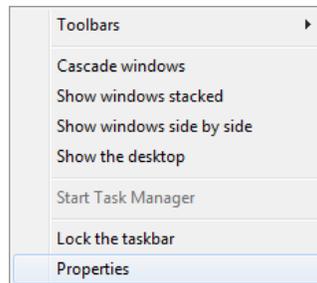
Do not show a Tutor Selection screen: Check this box if you are using the Plug-in software and you do not want to show the Tutor's Selection screen at sign in into the ComputerLab Plug-in.

Do not allow sign in from multiple stations: Use this option to restrict sign-in access from multiple locations. Student must sign-out completely from the ComputerLab Plug-in before being able to sign-in from another computer.

Automatically shut down plugin computers at X: Use this option to designate a time for computers running the plugin to shut down.

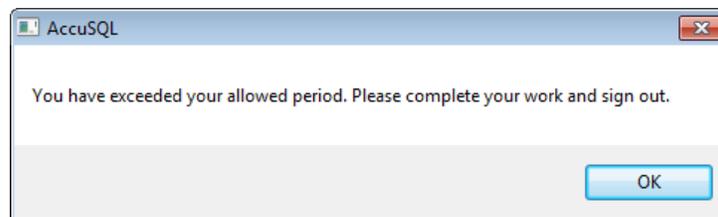
Offline mode: Use this option to restrict access to the web. Useful for labs where students should only be accessing offline programs such as writing labs. Note: Some Windows setup options can prevent this feature's functionality and need to be configured directly using Windows security options.

Disable Task Manager: When checked, will not allow students to run the Windows Task Manager. If selected, task Manager will be grayed out.



Hide the student's name from the floating Sign Out Window: Will not display the student's first and last name in the sign out window.

Warn if session time exceeds X minutes: Will warn students if they have been logged in longer than the period of time you define using X.



After student signs out: Determines what action the computer will take once a student signs out – return to the sign in screen, logout from Windows, or restart the computer.

Computer Lab Status:

Publish computer lab status to FTP: You can specify an ftp server to automatically publish the lab status report to that server.

Hide Page Lab Assistant button: Will not display the Page Lab Assistant button when students are signed into the plug in.

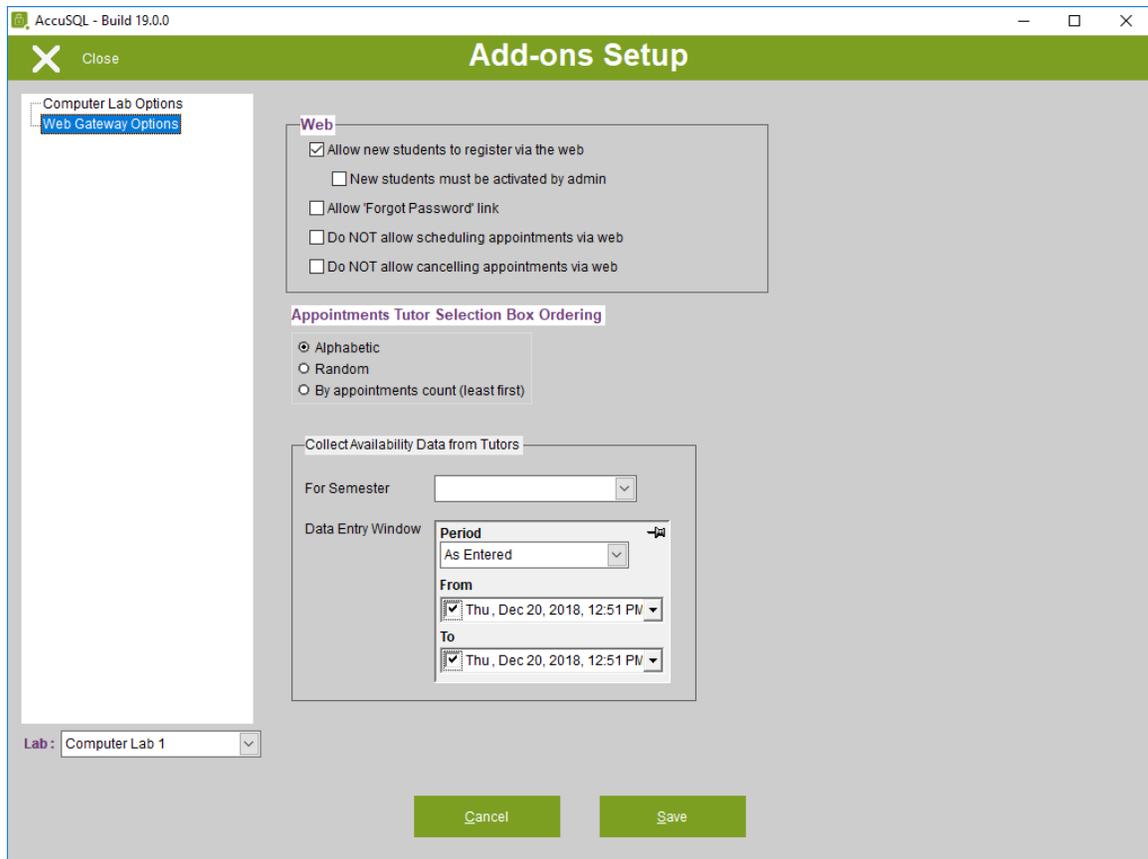
Require student password at sign-in: For an added level of security, you can require students to enter both their student ID and password to unlock the Computer Lab Plugin software. **Note:** You can set all

student passwords to either the same as the ID, or the lower case last name in the System Access >> Reset Student Passwords screen. Student passwords can also be imported.

Note: If you are interested in adding the Computer Lab Plugin for either AccuSQL or AccuTrack, please contact us at info@engineerica.com and we would be happy to assist.

WEB GATEWAY OPTIONS

To access the Web Gateway Setup options, click Add-ons in System Administration, then the Setup tab in the bottom right of the screen. Now click on Web Gateway Options on the left side of the Options menu to select it.



If you use the Web Gateway (web-based appointment plugin module for AccuSQL/AccuTrack), use this page to configure some related options:

Allow new student to register via the web: If this option is checked, AccuSQL/AccuTrack will allow new students to add themselves to the student database via the Web Gateway module.

New students must be activated by admin: If you check the option above, use this option to indicate whether new students have immediate access to appointment scheduling. If this option is checked, new students who registered via the web are set as “inactive”. The administrator can then view these

students in the AccuSQL/AccuTrack Students screen and activate them to give them access to appointments scheduling.

Allow forgot password link: If this option is checked, Web Gateway will allow students who forgot their passwords to request that their password be sent to them via email.

Do NOT allow scheduling appointments via web: If this option is checked, Web Gateway will NOT allow students to schedule appointments via the web.

Do NOT allow cancelling appointments via web: If this option is checked, Web Gateway will not allow students to cancel appointments via the web.

Note: If you are interested in adding Web Gateway for either AccuSQL or AccuTrack, please contact us at info@engineerica.com and we would be happy to assist.

SUCCESS PLANS SCREEN

When you click on Success Plans from the main System Administration Menu, you will see the following options:

- **Student Plans:** Use to view and complete student plans for a selected student.
- **Action Items:** Use to create action types and the action items that are grouped under action type. After creating to action types and items, you can create an action package from any of the items.
- **Bulk Assignment:** Use to assign action items or action packages to individual students or all member of a student group.

STUDENT PLANS

Purpose: View and complete action items for a student.

Access: From System Administration, click on Success Plans >> Student Plans.

AccuSQL - Build 19.0.0

Close Student Plans

Student: Thongpaen, Tawan [8888888] Show completed

Action Type	Mnemonic	Action Item	Assigned	Due	Complete	Completed
Academic Intervention	ADI	Initial Meeting with Mentor	07/11/2018 0	08/15/2018 0	<input type="checkbox"/>	
Advising	ADVED	Review your educational plan with your academic advisor	07/11/2018 0	07/16/2018 0	<input type="checkbox"/>	
Meet With Tutor	MT	Math Tutor	07/11/2018 0	08/15/2018 0	<input checked="" type="checkbox"/>	07/20/2018 1
Meet With Tutor	MT	Math Tutor	07/20/2018 1	08/03/2018 1	<input type="checkbox"/>	

Action Type: Academic Intervention | Action Item: Initial Meeting with Mentor | Mnemonic: ADI | Default Duration: 168

Date Assigned: 07/11/2018 02:53 PM | Date Due: 08/15/2018 02:53 PM | Assigned By: Supreme King

Assignment Notes: Please set an appointment with your assigned mentor from the Advising office or using the WebGateway.

Completed | Date Completed: | Completed By: | Completion Notes:

Add New Assignment(s) | Complete Assignment | Remove Assignment

Student: Click the  button to select a student. If the student has any action items assigned, they will appear in the display grid. Click on an item in the grid to view the details for that item.

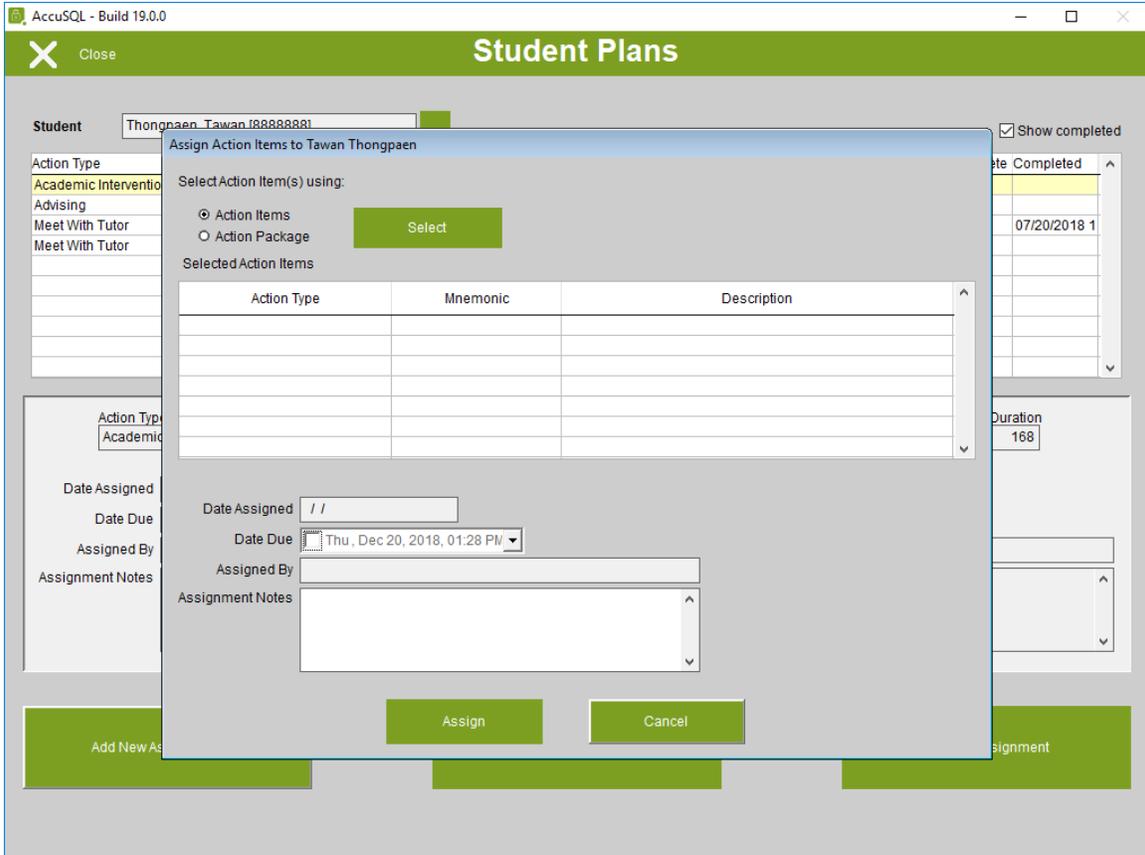
Show completed: After selecting a student, check this box to show both completed and non-completed items.

Action Details: After you select an action item for a student from the top grid, the center area of the screen will show the details on the selected item.

Note: Learn more about using Success Plans from our blog at: <http://accuideas.blogspot.com/2014/09/student-success-plans.html>

ADD NEW ASSIGNMENT(S)

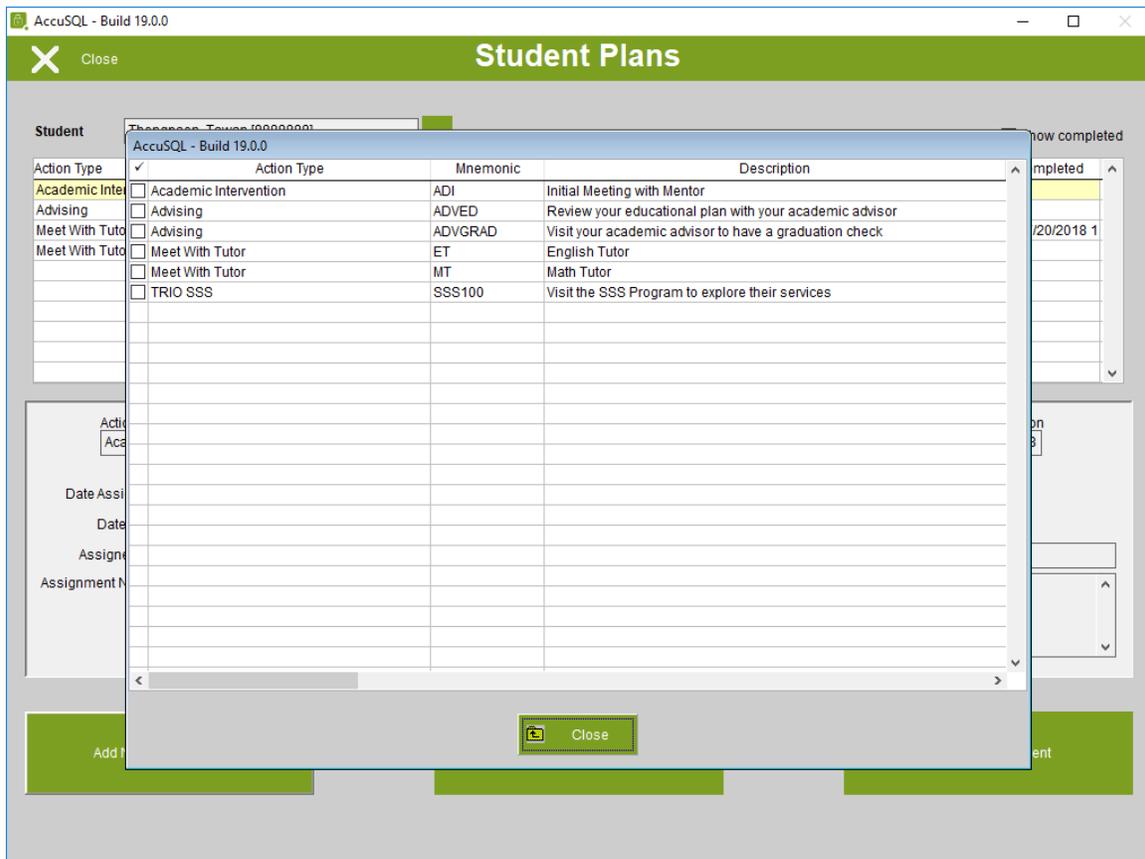
Use this button to add a new Action Item or Action Package for the selected student.



Action Items: If you would like to add a single Action item for the student, click this radio button. Action Items are created in the Success Plans >> Action Items screen and then assigning them here.

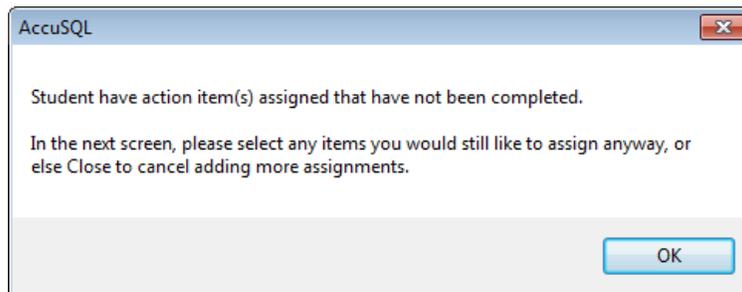
Action Package: If you would like to add a group of actions for the student, click this radio button. Action Packages are created in the Success Plans >> Action Items screen by first creating the Action Types and Action Items, creating an Action Package from the items, and then assigning them here.

Select: After you have selected either the Action Items, or Action Package radio button, click the Select button to add the item or package for the student. A screen will appear where you can select the action items you would like to add:



Select the desired items and then click the Close button. Back on the Assign Action Items screen, add any notes for the items and then click the Assign button.

If you have the same Action Item assigned to a student already and it is not marked as complete, when you assign the item(s), you will receive the following message:



Then in the Select Action Items pick list, you can select the items you would like to duplicate, or else do not select any items and then click Close to avoid adding any duplicate items:

Date Assigned: Automatically generated.

Due Date: This field will be populated with the Duration you entered when you created the Action Item initially. You can change the date and/or time the item is due to override the default due date.

Assigned By: This field will automatically be populated with the currently logged in AccuSQL or AccuTrack user who is creating the assignment.

Assignment Notes: Enter any notes you would like to include for the assignment.

Assign: Click this button to assign the item to the student. It will then be added to the Student Plan you have selected.

Cancel: Cancels current operation and returns you back to the main Student Plans screen.

COMPLETE ASSIGNMENT

After you have selected a student in the main Student Plans screen, any incomplete assignments will not have the Completed checkbox selected in the top display grid. Click on one of those assignments and the Complete Assignment at the bottom of the screen will become available. Click Complete Assignment and you will be presented with a screen where you can enter any completion notes.

AccuSQL - Build 19.0.0

Completion Notes Student met with Mentor and he confirmed weekly appointment availability to assist with mentoring for Health Sciences

Date Completed Thu, Dec 20, 2018, 01:33 PM

Complete Cancel

Enter your notes, if desired, and then click the Complete button. The screen will close and you will be returned to the main Student Plans screen with that item marked as complete. Click on the item to display the details for it.

Mnemonic: Enter a short code for the action item.

Description: Enter the description for the action item.

Duration: First select the hours, days, or weeks radio button, then enter a number based on that value. This is when the action item is due after the date/time it is assigned to the student. **Note:** After saving, the number will convert to hours automatically. This is expected and should be left as is.

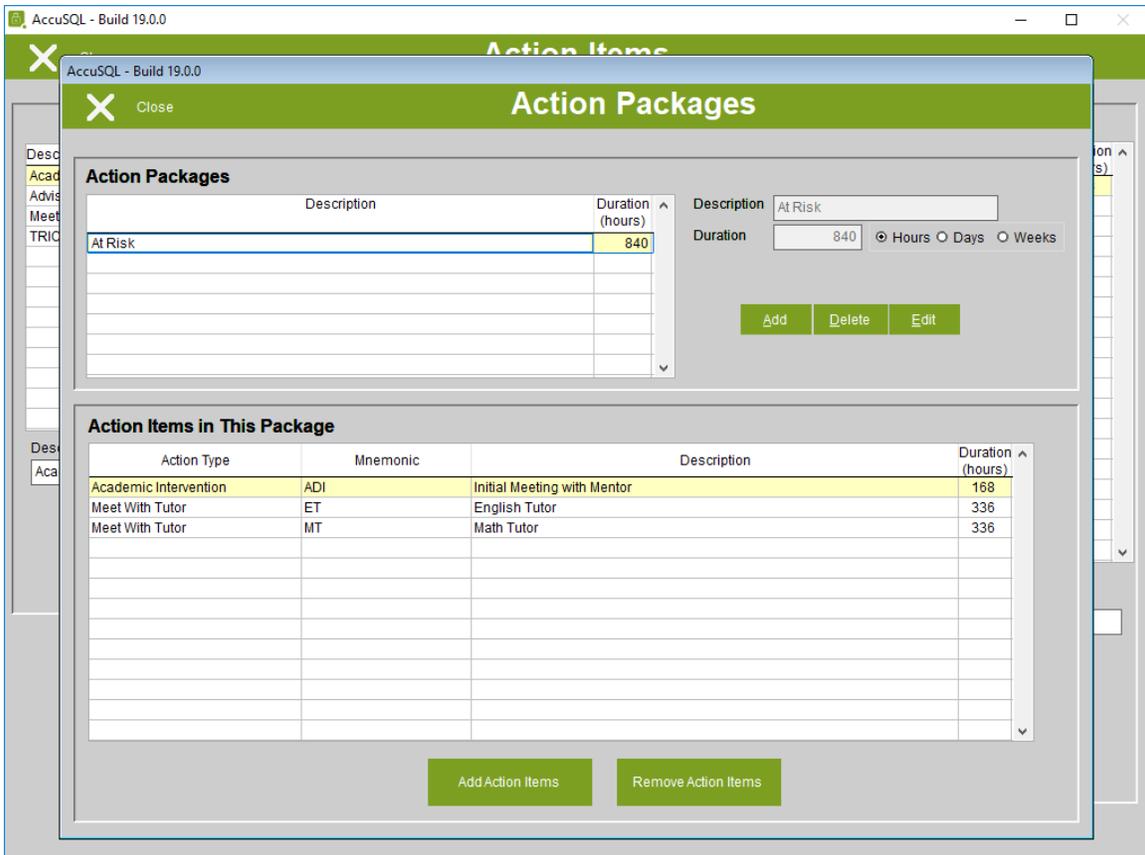
Notes: Add any notes to elaborate on the action item. These are internal and will not appear on the Action Plan report.

Save: After you have created the action item click Save to save your work. You can continue adding items for the selected Action Type using this method.

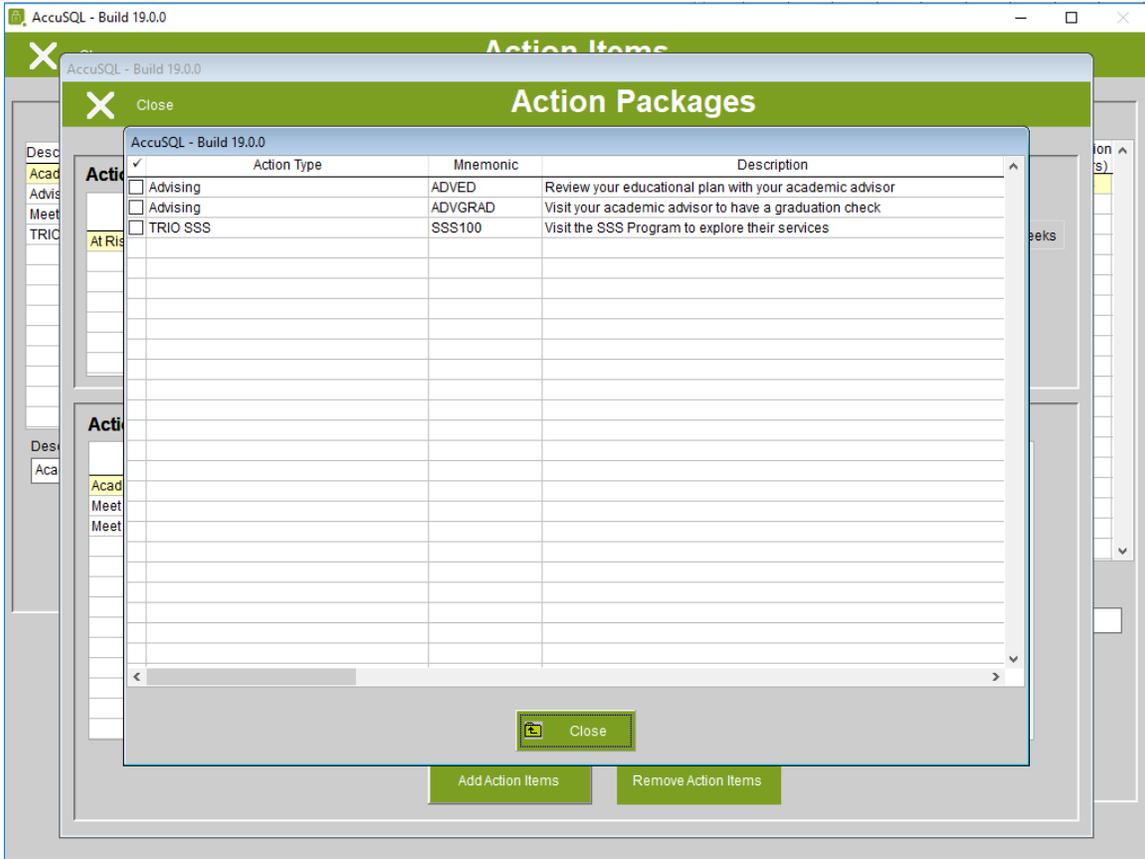
CREATING AN ACTION PACKAGE FROM ACTION ITEMS

After you have finished adding the various Action Types and Action Items that appear under them, you can create an Action Package. You can assign the Action Package to the student and all action items that are included will be assigned to the student at once if you so choose.

To create the package, click the Create Action Packages button. Now click Add and create a description and, if desired, the completion duration for the overall package and click Save.

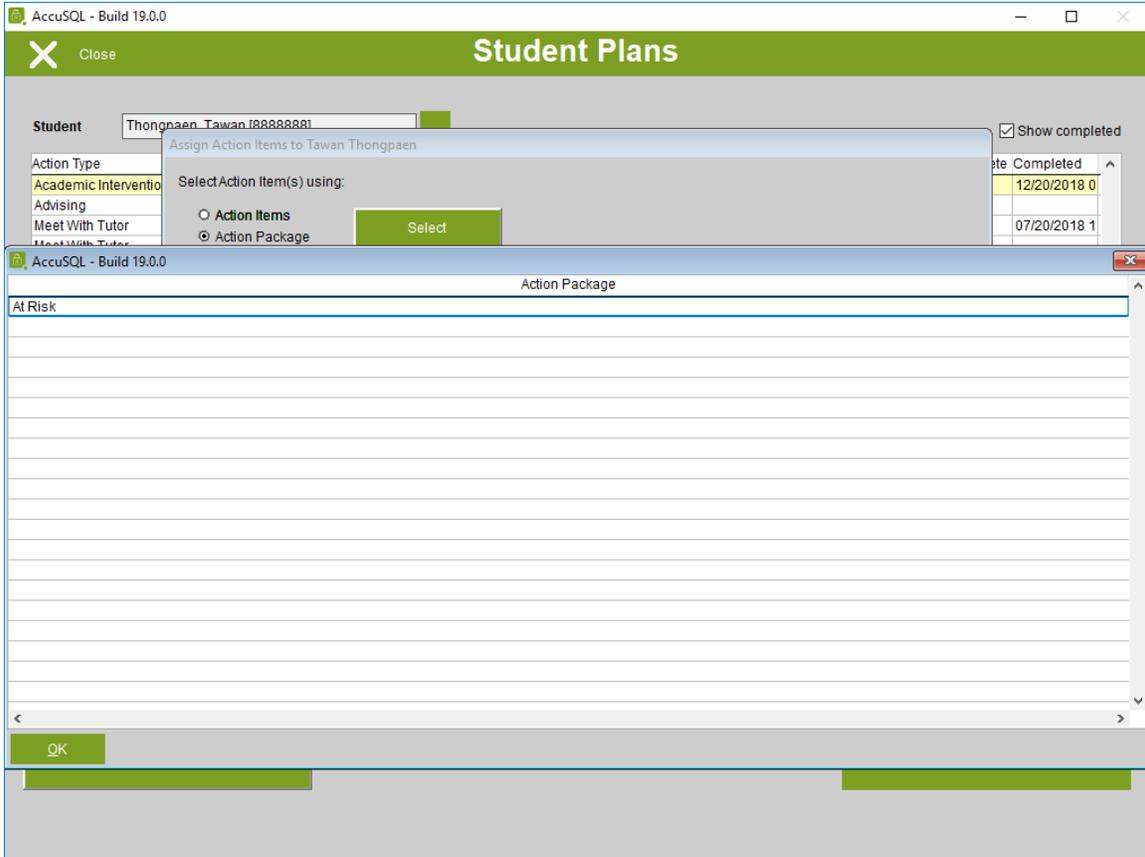


Now click the Add Action Items button at the bottom. All of your action items will appear grouped by Action Type. Click the checkboxes next to the items you would like to include in the package and then click Close.



You will be returned to the Action Packages with the items assigned to the package. You can now click close.

Note: In the Success Plans >> Student Plans screen, after you select the student, you can click Add new Assignment(s) and then select the Action Packages radio to select an action package to assign to the student versus adding and individual item.



BULK ASSIGNMENT

Purpose: Assign an action item or action package to several students at once using either a pick list of students or student group list.

Access: From System Administration, click on Success Plans >> Bulk Assignment.

AccuSQL - Build 19.0.0

Bulk Assign Action Items

Select students using:

Students list
 Student Groups

Select

First Name	Last Name	Id

Select Action Item(s) using:

Action Items
 Action Package

Select

Action Type	Mnemonic	Description

Date Assigned: //

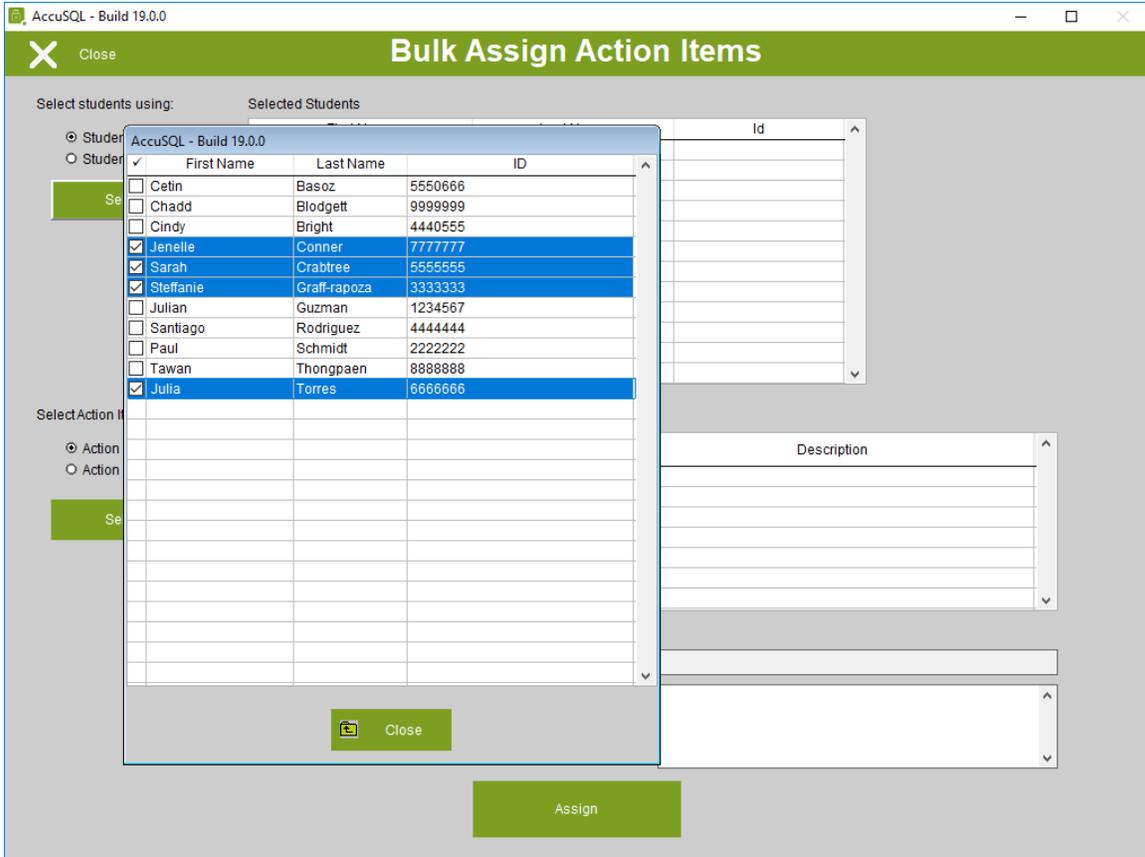
Date Due: Thu, Dec 20, 2018, 01:40 PM

Assigned By: _____

Assignment Notes: _____

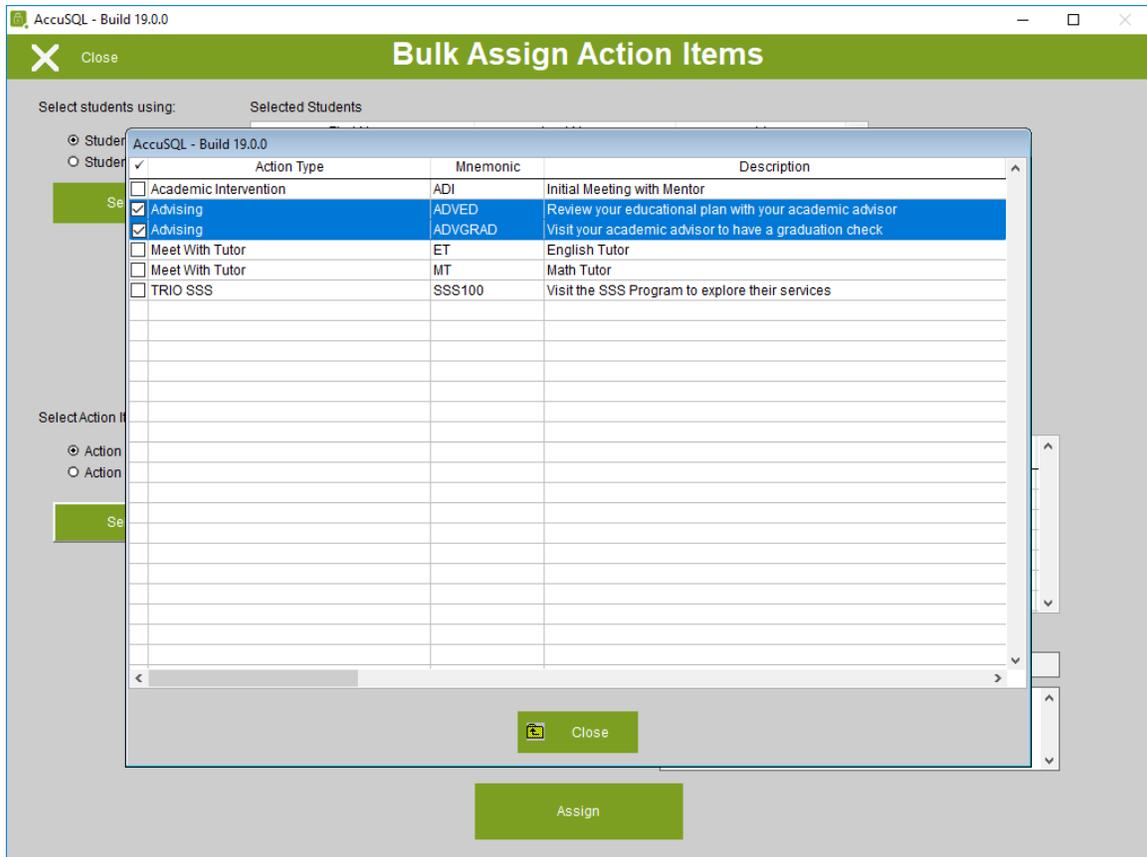
Assign

If you want to assign items via a pick list of student, click the Student list radio button and a list of the students will appear in a pick list. Click the checkbox next to each student to whom you want to assign items, and then click Close.



The students will then be added to the Selected Students display grid.

If you prefer to select the students from a group, click the Student Groups radio button and then click Select. You can then select one or more student groups to populate the Selected Students display grid:



After you have selected the desired students, using either method, click either the Action Items radio button or the Action Package radio button and then click Select to add the desired items to the selected students and then click OK.

AccuSQL - Build 19.0.0

Bulk Assign Action Items

Select students using:

Students list
 Student Groups

Select

First Name	Last Name	Id
Tawan	Thongpaen	8888888
Julia	Torres	6666666

Select Action Item(s) using:

Action Items
 Action Package

Select

Action Type	Mnemonic	Description
Academic Intervention	ADI	Initial Meeting with Mentor

Date Assigned: 12/20/2018 01:46 PM
 Date Due: Thu, Dec 27, 2018, 01:46 PM
 Assigned By: Supreme King
 Assignment Notes:

Assign

Finally, change the due date if so desired, enter any assignment notes and then click the Assign button to assign the Selected Action Items for the selected students.

After the process is done, you can then click Close. You can then access the Success Plans >> Student Plans screen to work with the students you created the actions items to action package for using the bulk assignments.

INDIVIDUAL EDUCATIONAL ACTION PLAN REPORT

From System Administration, click Success Plans then the Reports tab (bottom right) to access the Individual Education Action Plan Report. You can filter this report for specific students or student groups:

The screenshot shows the 'Reports' window in AccuSQL - Build 19.0.0. The window title is 'AccuSQL - Build 19.0.0' and the main header is 'Reports'. On the left is a sidebar with a tree view containing: Success Plan Reports (with sub-item Individual Educational Action Plan), Assigned Items by Tutor, Memorized Reports, Customized Reports, Favorites, Downloaded Reports, and Scheduled Reports. The main area is divided into several sections:

- Time Format:** Radio buttons for 'Hours and fractions', 'Hours and minutes' (selected), and 'Use Positive Hours'.
- Report Type:** Radio buttons for 'Detailed Report' (selected) and 'Summary Report'. Below are checkboxes for 'Show Visitor ID' and 'Show Student Phone number'.
- Filter On:** A section with a 'Period' dropdown set to 'This Semester', 'From' and 'To' date pickers (Sat, Sep 01, 2018, 12:00 AM and Mon, Dec 31, 2018, 11:59 PM), and a list of checkboxes for filter categories: Students, Activities, Tutors, Instructors, Media, Student groups (checked), Service Type, Sports, Lab IDs, Tutor groups, and Use native report engine. A 'Set Filter' button is next to the 'Student groups' checkbox.
- Student name format (where appropriate):** Radio buttons for 'Last, First' (selected) and 'First Last'.
- Tutor name format (where appropriate):** Radio buttons for 'Last, First' (selected) and 'First Last'.

 At the bottom are three buttons: 'Show Report', 'Export Data', and 'Create Student Group'.

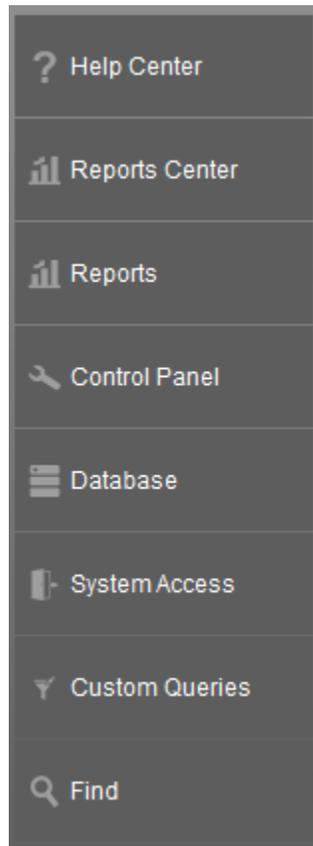
Note: Students can also run this report for themselves from the Student Pad >> Reports screen.

SUCCESS PLANS OPTIONS

There are no setup options for this module.

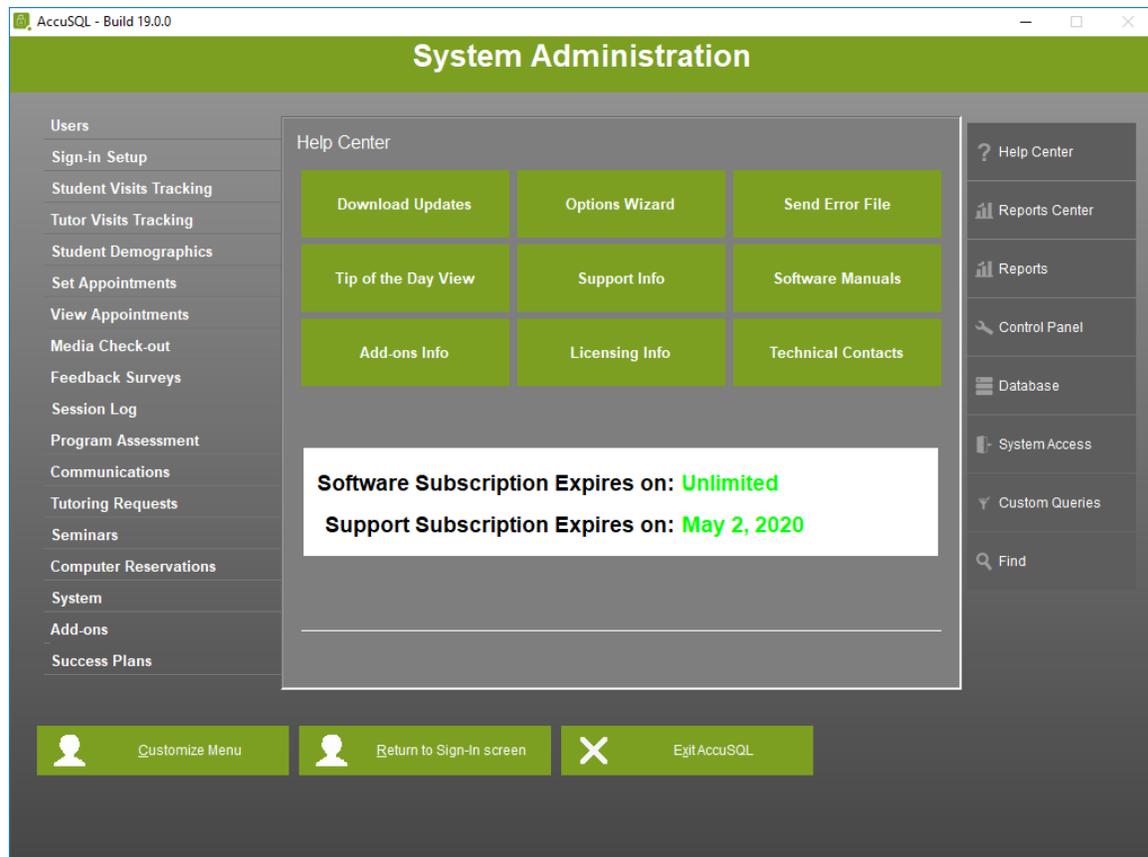
SYSTEM MENU OPTIONS

On the right side of the System Administration screen, there are links to various system options. Click on one of these options to load the screens available for it. Some options will load the options available in the main display area of System Administration, while other will go directly to the screen indicated.



HELP CENTER OPTIONS

When you click on Help Center on the right side of the System Administration screen, the Help Center option will load in the main display area.



The AccuSQL/AccuTrack Help Center contains useful functions for getting help with AccuSQL/AccuTrack:

- **Download Updates:** Access information about the version of the software your center is running, check for new updates and download updates as they become available from our website.
- **Options Wizard:** Walks you through step by step directions for setting up individual centers.
- **Send Error File:** If error files are generated by the system, allows you to automatically send them to Engineerica Support via email.
- **Tip of the Day View:** Allows you to view helpful tips for using AccuSQL/AccuTrack.
- **Support Info:** Access the engineerica.com website support pages.
- **Software Manuals:** Access various AccuSQL/AccuTrack manuals via the web.

- **Add-ons Info:** Allows you to view information about available add-ons for AccuSQL/AccuTrack.
- **Licensing Info:** Open the engineerica.com website to review licensing options.
- **Technical Contacts:** Allows you to access your Support Center to create technical contacts that can contact Engineerica directly with support questions.
- **Support Information:** Shows when the current subscription is set to expire and/or when the current platinum support plan is set to expire. If you have questions about either of these, please contact us at support@accutrack.org

DOWNLOAD UPDATES

Access: From System Administration, click Help Center >>Download Updates.

For time to time, we will release updates to the software that include feature enhancements and/or bug fixes. When you click Download Updates, AccuSQL/AccuTrack will query our ftp server to determine if an update is available. If so, it will download the necessary update files to the Database Shared folder. In the shared folder, the files are saved in an UPDATES folder. If you have your AccuSQL/AccuTrack computers pointing to the same Shared Folder (recommended) then you only need download the updates once. When AccuSQL/AccuTrack opens, it checks the Shared Folder\UPDATES folder to see if any new files are available to it and if so, it will copy the files it needs back to it.

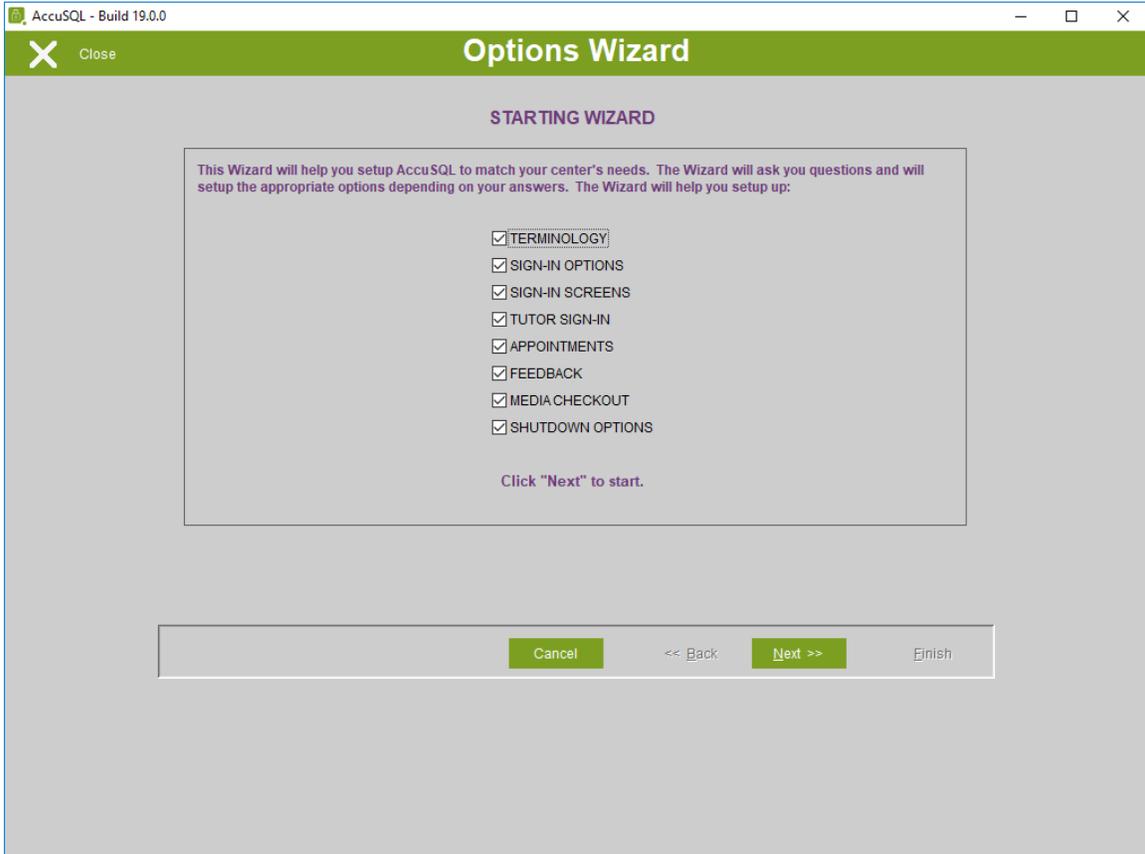
Important: Due to Windows security settings, your Windows configuration may not allow files to be copied back from the UPDATES folder to the folder where AccuSQL or AccuTrack is installed programmatically. If you get a message that files cannot be copied, then you can go to the shared UPDATES folder and copy the files from there and then copy and replace them back to the folder where AccuSQL or AccuTrack is installed to manually complete the update. If that is not allowed, then you would need someone with admin access to Windows to perform that task. You must exit AccuSQL or AccuTrack completely before performing this operation.

OPTIONS WIZARD

Access: From System Administration, click Help Center >> Options Wizard.

The Options Wizard provides novice users an easy way to configure the main options in AccuSQL/AccuTrack. The Options Wizard asks some questions and sets up corresponding options according to the answers.

You can navigate through all the steps by using the "Back" and "Next" buttons. At any time you can save your changes just by clicking on the "Finish" button or cancel your changes and close the wizard by clicking on the "Cancel" button.



Use this page to select the areas you want to configure with the Wizard. All the areas are selected by default. For example, if you don't want to configure the appointments section, clear the "Appointments" checkbox.

When you click Next after selecting the option(s) you want to configure, AccuSQL/AccuTrack will walk you through the screens indicated. After you have configured an option click Next to continue to the next option. After you have completed the last step, click Finish to save your changes and you will be returned to the main Help Center screen.

SEND ERROR FILE

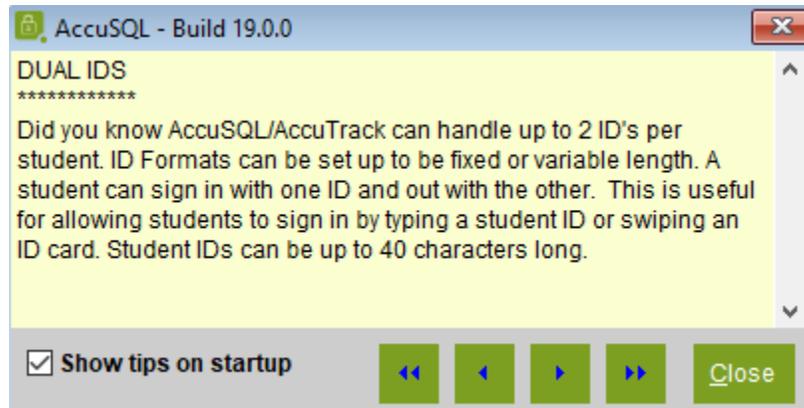
Access: From System Administration, click Help Center >> Send Error File.

If error files are generated by the system, allows you to automatically send them to Engineerica Support via email. When you click, if an error file exists, it will automatically send the file to Engineerica support. If there is no error file present, it will display that message.

TIP OF THE DAY VIEW

Access: From System Administration, click Help Center >> Tip of the Day View.

Use the left and right arrow keys to access helpful tips of using AccuSQL/AccuTrack. If you check the Show tips on startup (default), the **Tip of the day** screen will be displayed when starting up AccuSQL/AccuTrack.



SUPPORT INFO

Access: From System Administration, click Help Center >> Support Info.

Click to open the AccuSQL/AccuTrack Support pages at www.engineerica.com.

SOFTWARE MANUALS

Access: From System Administration, click Help Center >> Software Manuals.

Click to open various AccuSQL/AccuTrack help manuals online.

ADD-ONS INFO

Access: From System Administration, click Help Center >> Add-ons Info.

Click to view information about the various plug-ins that are available for AccuSQL/AccuTrack.

LICENSING INFO

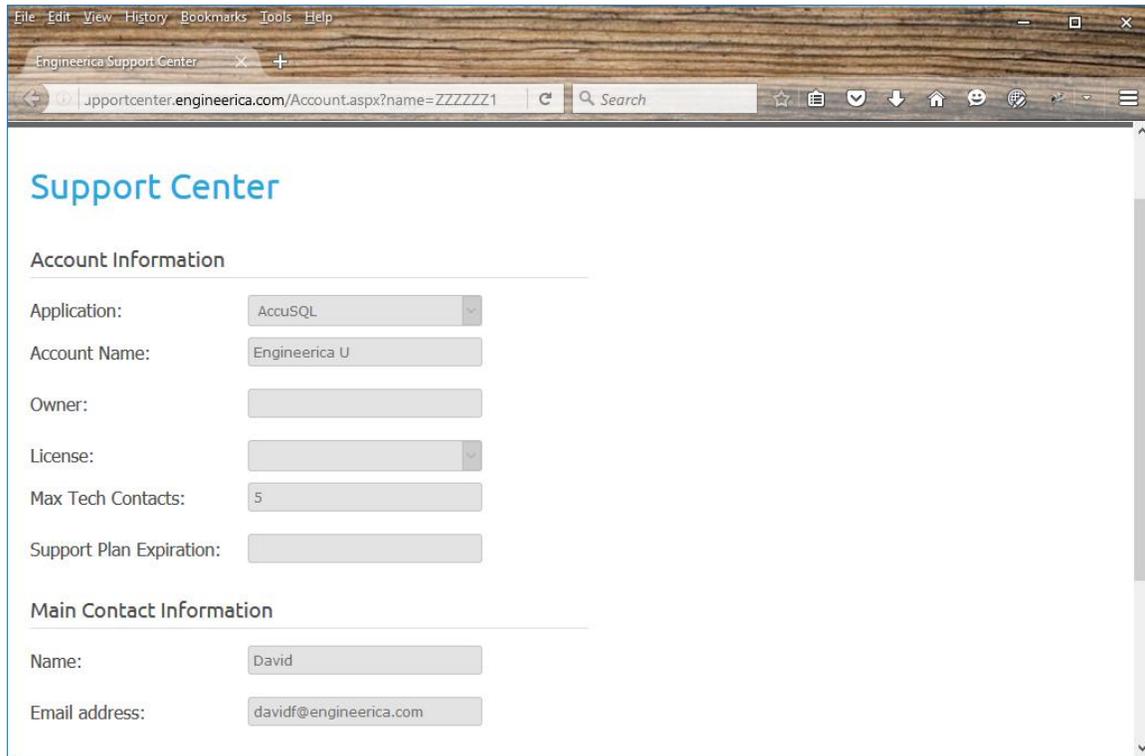
Access: From System Administration, click Help Center >> Licensing Info.

Click to view information about the various AccuSQL/AccuTrack licensing options.

TECHNICAL CONTACTS

Access: From System Administration, click Help Center >> Technical Contacts.

Click to view or add technical contacts for your college. You will need a key to access this page. Technical contacts are the staff members at your organization that have direct support availability with our staff. The number of technical contacts you can add is based on your license type. If you do not have that information, please contact us at support@accutrack.org and we will be happy to provide it.



The screenshot shows a web browser window with the URL `supportcenter.engineerica.com/Account.aspx?name=ZZZZZ1`. The page title is "Support Center". It contains two sections: "Account Information" and "Main Contact Information".

Account Information

Application:	AccuSQL
Account Name:	Engineerica U
Owner:	
License:	
Max Tech Contacts:	5
Support Plan Expiration:	

Main Contact Information

Name:	David
Email address:	davidf@engineerica.com

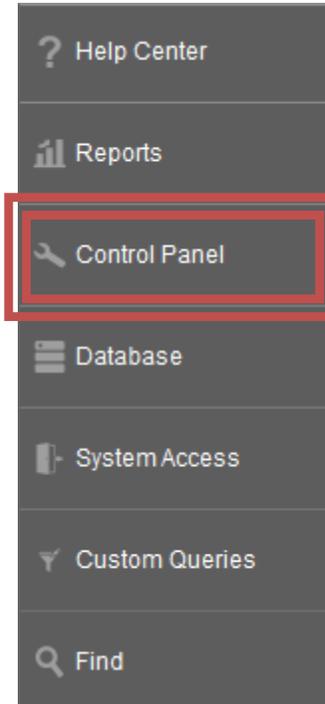
REPORTS OPTIONS

Detailed information for all of the reports available for AccuSQL and AccuTrack are now located in the Reports Manual located at: http://cdn1.engineerica.com/sites/default/files/Accu2016_REPORTS.pdf

CONTROL PANEL OPTIONS

Remember, if you click an item on the left of the System Administration and then click the Setup tab, you will load the context specific control panel setup options for the item indicated.

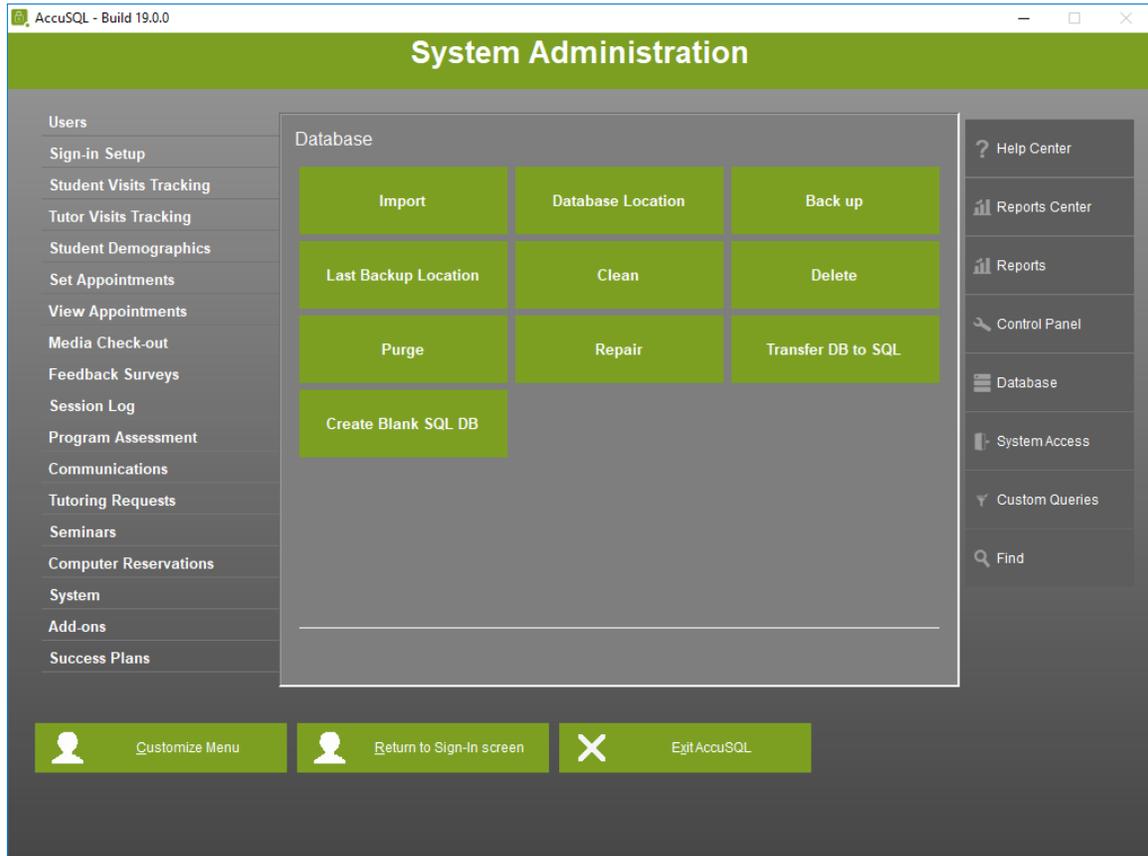
If you click Control Panel directly from System Administration, you can access all of the setup options available for AccuSQL/AccuTrack.



The various setup screens are explained in detail throughout this manual. Please consult the “Setup Options” section of the manual for the item you have selected on the left menu of System Administration for detailed information about the setup option for that item.

DATABASE OPTIONS

When you click on Database Options on the right side of the System Administration screen, the Database options will load in the main display area.



IMPORT

Purpose: To import data from text files into AccuSQL/AccuTrack.

Access: From System Administration, click on Database>>Import.

AccuSQL/AccuTrack allows you to import lots of data electronically from a text file into the database. This capability offers many benefits, including:

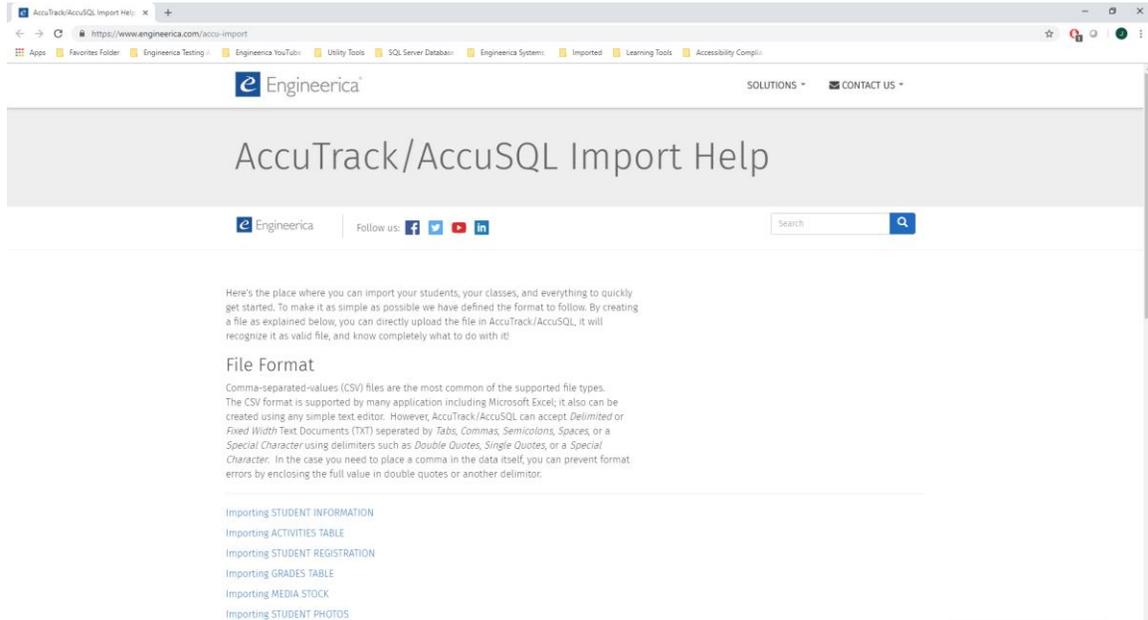
- To save students the time and effort of typing in their info.
- To guarantee more accuracy by avoiding manual typing.
- To restrict the usage of your center to a certain set of students (e.g. those registered in classes). You can do this by importing the names of the students that are authorized to use your center, and un-checking the option "Allow new students" in the Options screen .

AccuSQL/AccuTrack includes a powerful *Import Wizard* for importing data from different file formats. The Import Wizard offers you the flexibility to map your data and import it to AccuSQL/AccuTrack's tables using a few easy steps. To launch the wizard, click on the Database >> Import. The following is an explanation of each step of the import. The basic steps apply for all imports, although there are differences in some of the options you can select (or not) and also the field mappings, of course, are different for each import.

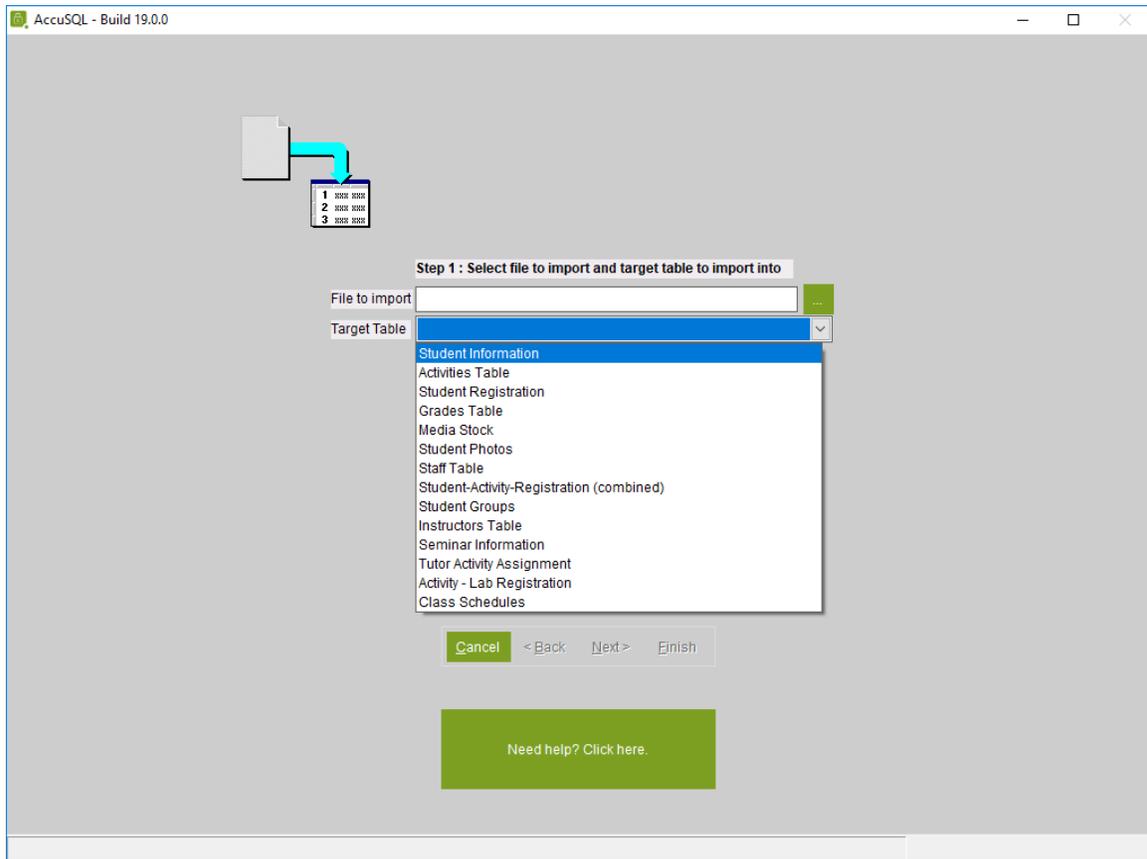
Important: In the Database Import screen, you will see a Need help? Click here button.



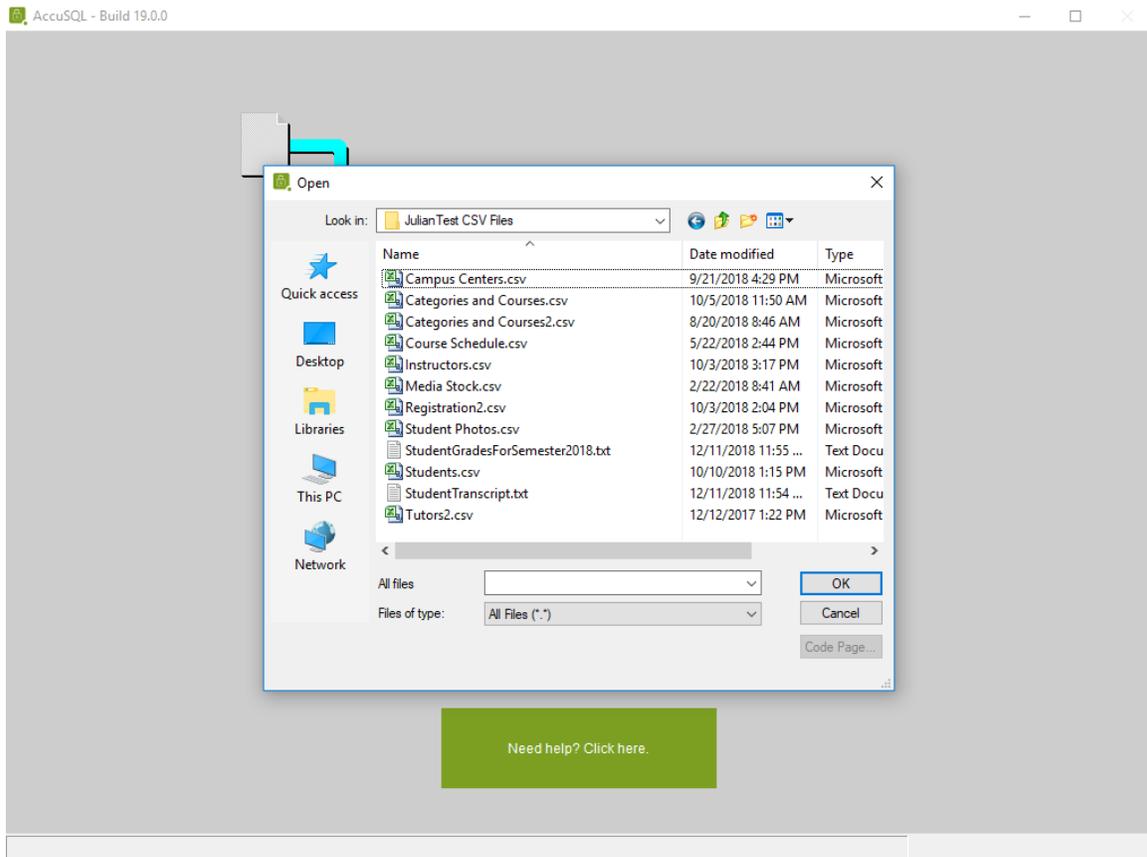
Click to open our support website with detailed information about each import. There are also sample import file you can download to try the various imports yourself!



STEP 1: SELECT FILE TO IMPORT AND TARGET TABLE TO IMPORT INFO.



Start by selecting the data file you want to import. This must be comma-delimited (CSV) or other delimited text file. To select the file, click on the open button . This will bring up the select file (Open) window.



Use this window to find and highlight the appropriate file, and then click on "OK". If the file you are importing is a .txt file, then you will see it in the list when you go to its folder location. If it is another type of file (such as .csv) click the Files of type drop-down box and then click All Files to display it.

Next select the table where the imported data will be added from the drop-down list box. Here are the available options:

Option	Import Details
Student Information	Student's data, including name, ID, contact info, and profile data.
Activities Table	Student Activities that students see when they sign in. Can be used for classes.
Student Registration	Class registration data.
Grades Table	Grades used in assessment reports. You can import two sets

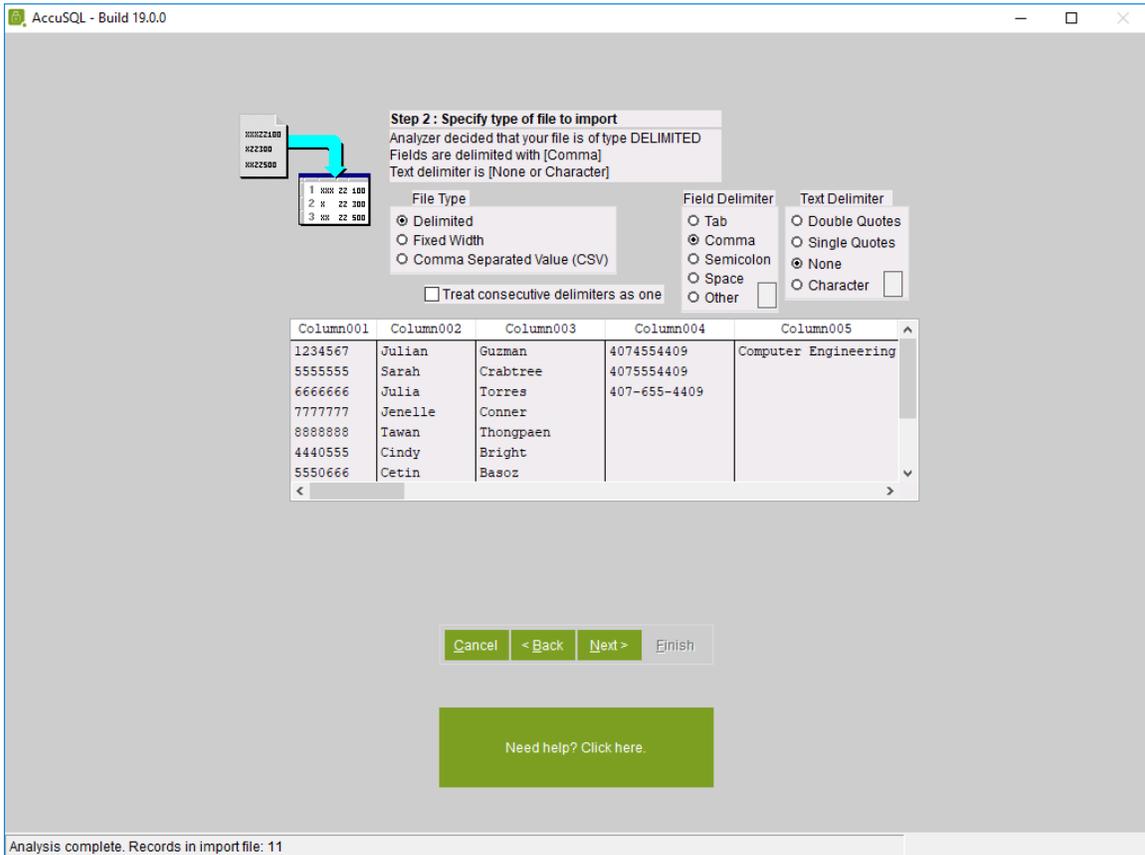
	of grades (starting and ending)
Media Stock	Your loaned media stock to be used in the checkout module.
Student Photos	Photos of students if you want to use them in sign-in.
Staff Table	Your tutors (e.g. tutors)
Student-Activity-registration (combined)	A single file with student's roster.
Student Groups	Import student into groups for use in several areas including report filters.
Instructors Table	Professors who teach your various courses.
Seminar Information	Import special events you host in your center.
Tutor Activity Assignments	The activities (courses) for which tutors are available.
Activity – Lab Registration	Used to import activities (courses) to be available in local labs.
Class Schedules	Import class schedules for existing activities (classes).

If you are importing students, for example, you would select the "Student Information" option.

When you complete the selections, the "Next" button will be enabled. Click on it to continue.

STEP 2: SPECIFY TYPE OF FILE TO IMPORT.

The Wizard has an intelligent analyzer that examines the import data file and selects the characteristic of this file automatically. The Wizard will show the selections on this page and will give you the opportunity to change them if needed.



Here are the characteristics that the Wizard shows in this screen:

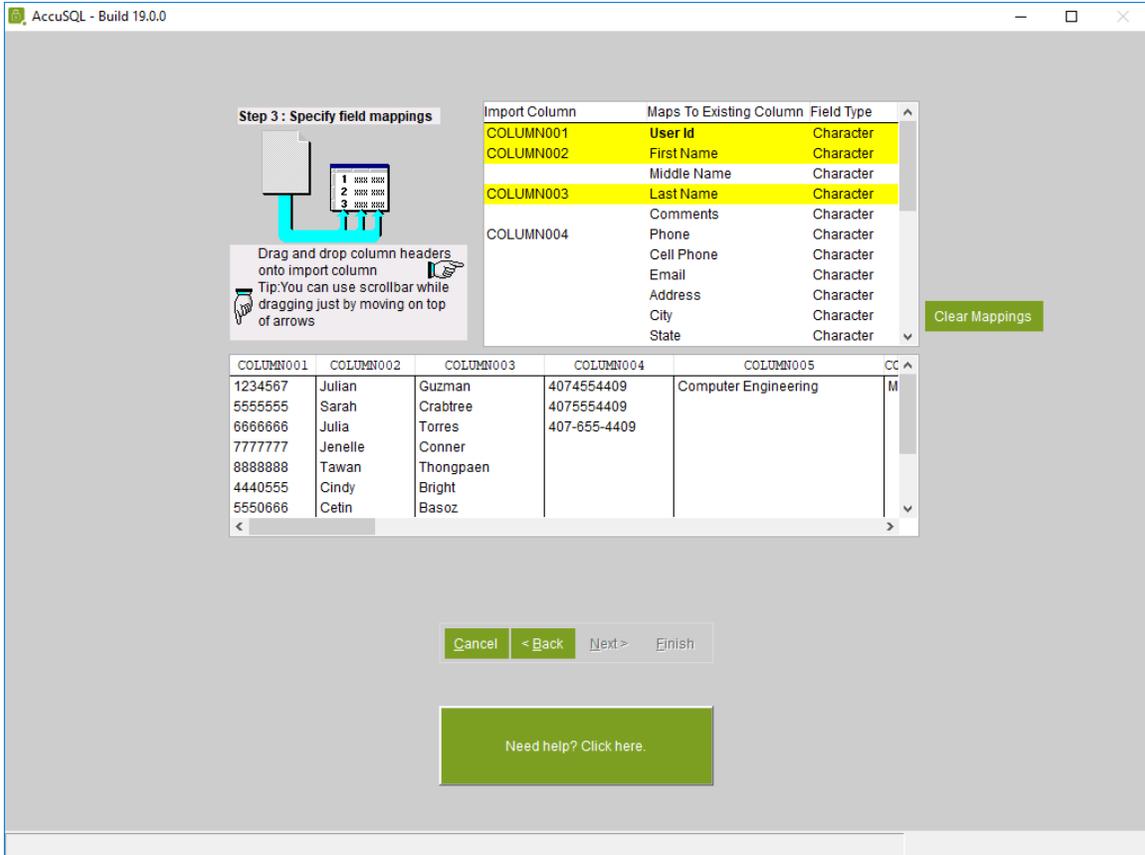
- 1. File Type:** comma delimited or fixed width (SDF).
- 2. Field Delimiter:** Indicates what separates one field from the next
- 3. Text Delimiter:** Indicates what character marks text fields, if any.

To change one of the values, simply click on a different option. The Wizard will reformat the data into the table in the lower half of screen and will show the effect of the selections on this table.

Important: Make sure the import file appears with each column separated (like in the previous screen above) or else your data will not import properly.

STEP 3: SPECIFY FIELD MAPPING

In this step map the fields in the imported file to the AccuSQL/AccuTrack table columns.



The list box at the top shows the fields in the AccuSQL/AccuTrack table. This list box lists both the name and type of field.

Tip: The required fields are highlighted in yellow. These fields must be mapped before you can move to the next step in the Import process. Fields that are not highlighted are optional – it is up to you whether to import them.

The table at the lower half of the screen shows the records in the import file. Each record is split into columns depending on the delimiter. To see all columns, use the horizontal scroll bar.

To map a column from the imported file to its corresponding AccuSQL/AccuTrack table column, click on the header of the column and drag it to the appropriate row in the AccuSQL/AccuTrack columns list box. The name of the dragged column will appear in the row where you dropped it. Repeat the same procedure to map all the columns you want to import.

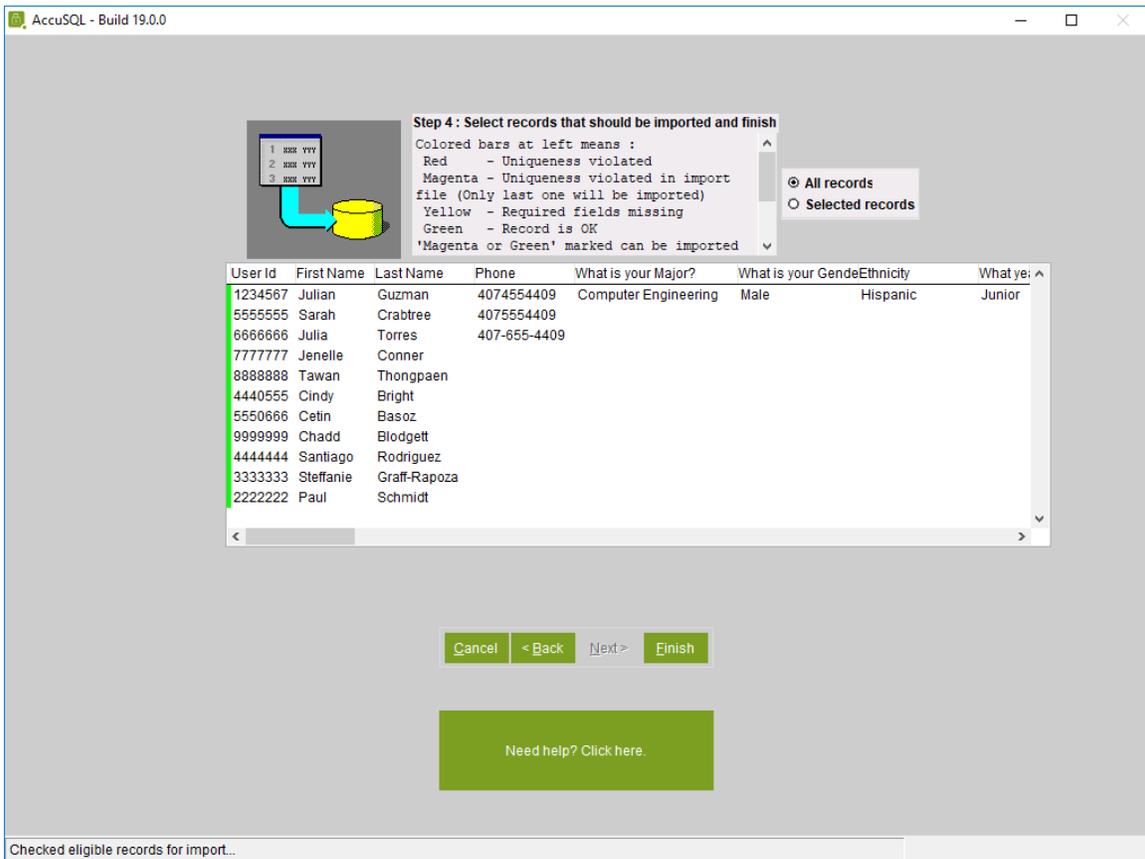
Tip: If one of the fields is the same for all, you can actually type the **text** of that field. For example, if you want all students to have the value “Washington” in the City column, you can type “Washington” instead of a column’s name.

Tip: Once you have mapped the required fields, the Next button will be enabled. Note that if you map the same field to more than one column, the “Next” button will become disabled.

Note: You only need to do the mapping from your text file to the AccuSQL/AccuTrack columns once. The software will ‘remember’ the mapping for your next import. If you do not change the order of the columns in your import file, you will not need to repeat the mapping step.

Click on Next to continue.

STEP 4: SELECT RECORDS AND FINISH



In this step of the Import Wizard you will see a table with the data that you are about to import into AccuSQL/AccuTrack. The headers of the table show the AccuSQL/AccuTrack fields, and each column

shows the corresponding data you are about to import. You will notice a color bar at the left of each row. The color of this bar indicates the row’s status as follows:

Red bar: The primary record in this row already exists in AccuSQL/AccuTrack’s table, thus it will not be possible to import this record. In this case this means the Social Security number is already in the AccuSQL/AccuTrack database.

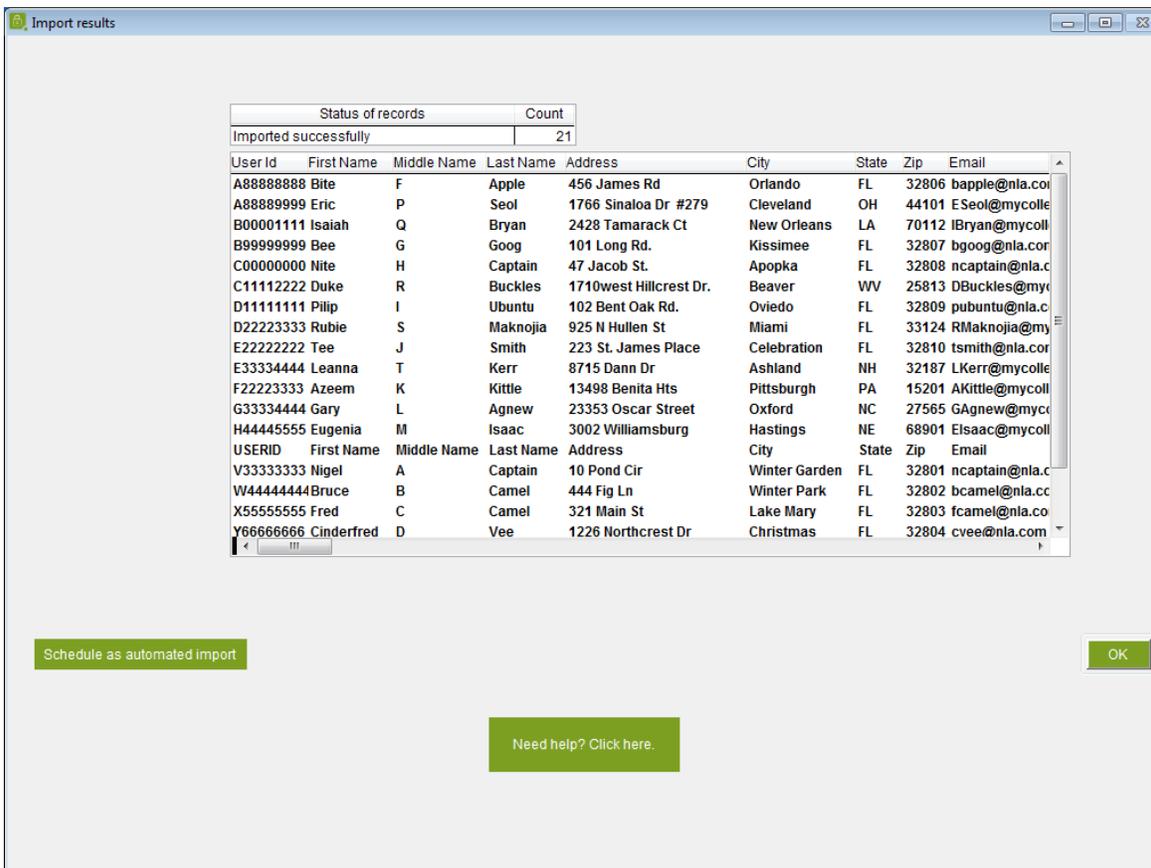
Magenta bar: The primary color in this row exists more than once in the import file. AccuSQL/AccuTrack will only import one of duplicated records (the last one).

Yellow bar: One of the required fields is missing. When you import students’ data, the social security number, first name, and last name are all required fields.

Green bar: The record is OK and can be imported.

If all the records are OK (green), you can click on the “All records” option button to import them all. If some of the records are not OK, or if you wish not to import all available records, you can click on the “selected records” option button. To select which records to import, simply highlight them by clicking on them while keeping the “Ctrl” button down.

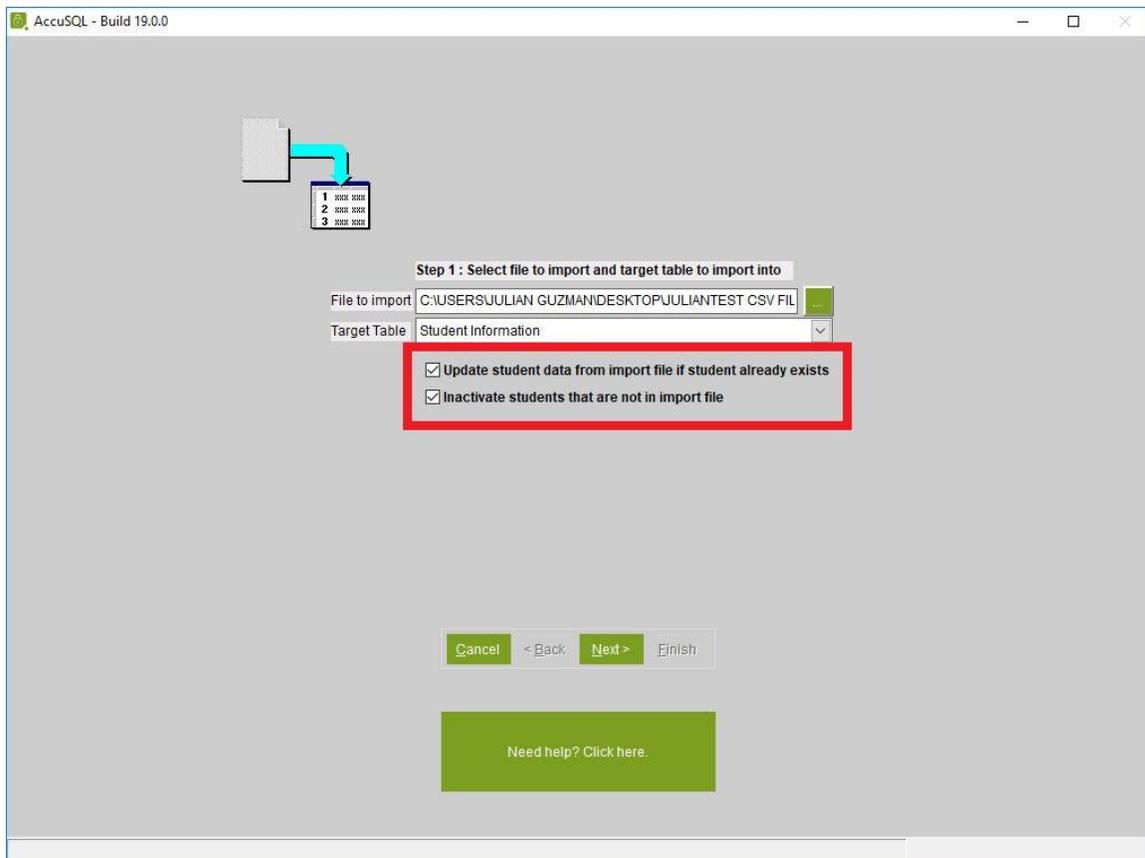
When you are ready to import the records, click on “Finish”. The records will be imported and you will see a page informing you of the results.



The box at the top of this screen gives you statistics on the status of this import:

The larger box lists the records in the import file. Any problematic records are highlighted for your review.

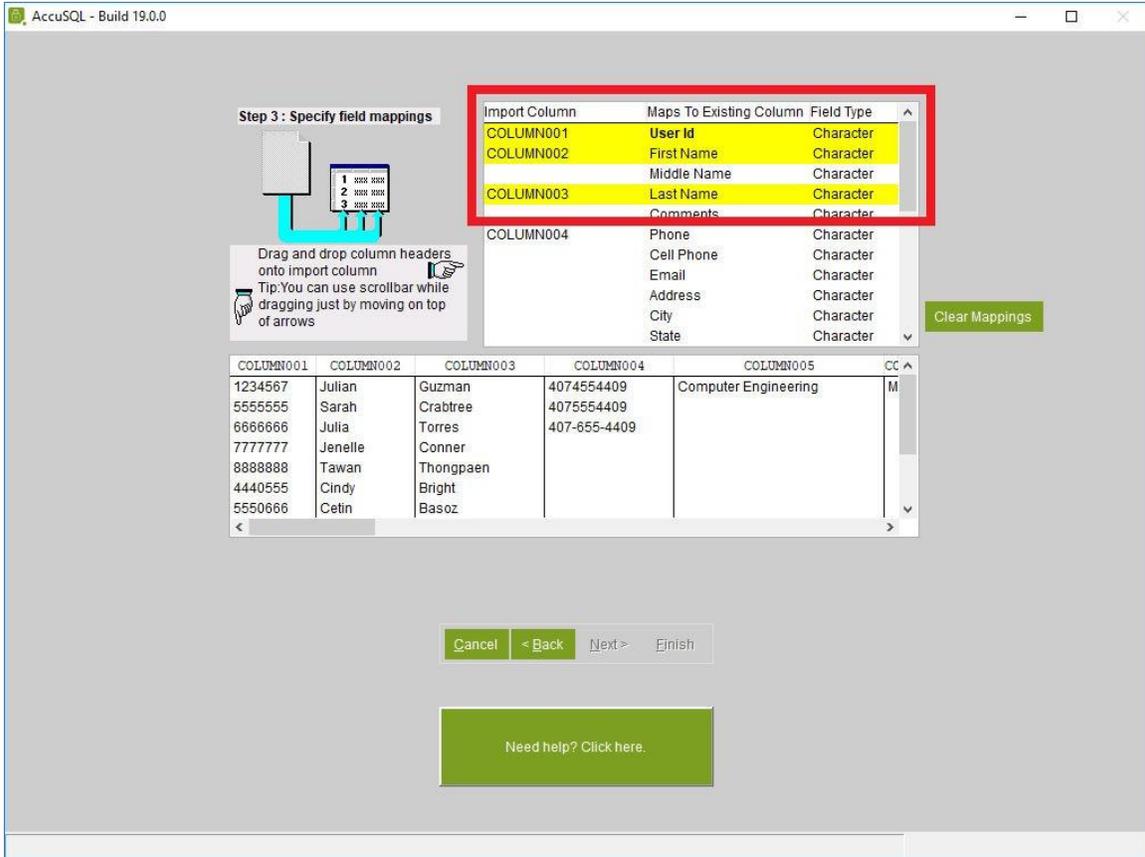
STUDENT INFORMATION IMPORT



When importing student info, Step 1 will have 2 extra options:

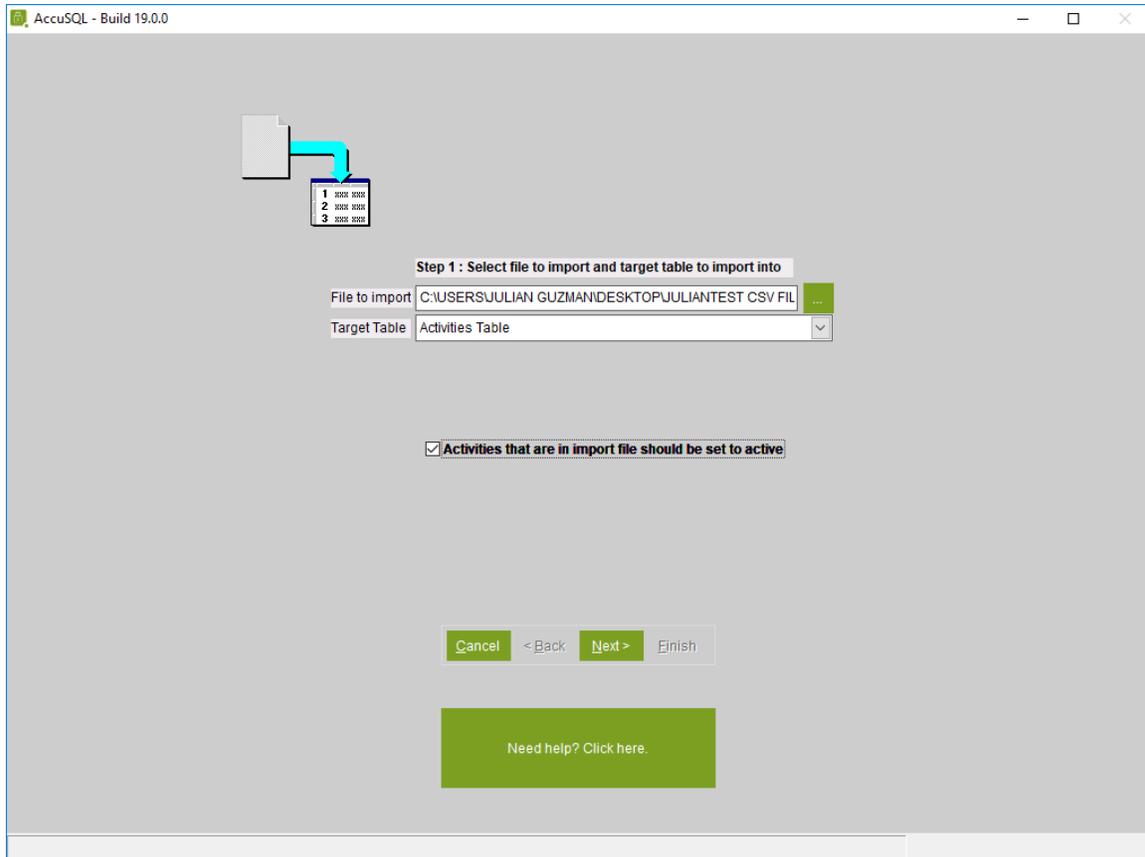
1. Update student data from import file if student already exists: If you check this option, AccuSQL/AccuTrack will update the student's data (e.g. contact info and profile values) of existing students in the database. If this option is not checked, AccuSQL/AccuTrack will skip records of students who are already in the database.
2. Inactivate students that are not in import file: If this option is checked, AccuSQL/AccuTrack will mark student records as inactive in the database if they are not in the import file.

When importing students, three fields are required: User ID (student sign-in ID), first name, and last name. However, the Import Wizard allows you import much more data, including the student’s contact info and profile data.



Tip: When importing your profile data, AccuSQL/AccuTrack will add the different profile options to the database automatically. For example, if your profile question is “Major”, AccuSQL/AccuTrack will populate the possible options in its database from the different majors it reads in the import file.

ACTIVITIES (CLASSES) TABLE IMPORT



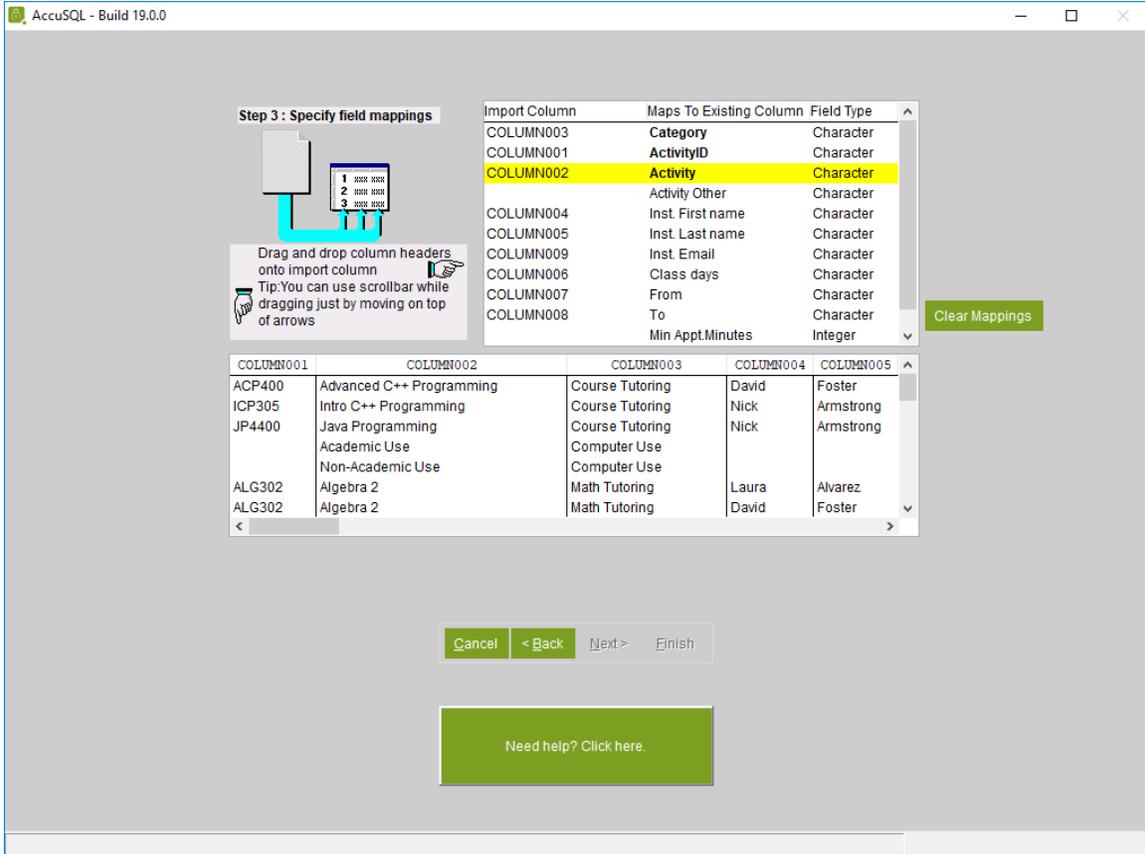
When importing student info, Step 1 will have 1 extra option:

1. **Activities that are in import file should be set to active:** If you check this option, AccuSQL/AccuTrack will automatically set all the activities in the import file to selected (and hence Active) in the System >> Semesters screen. Note: For this option to work properly, you need to have a semester defined that includes today. .

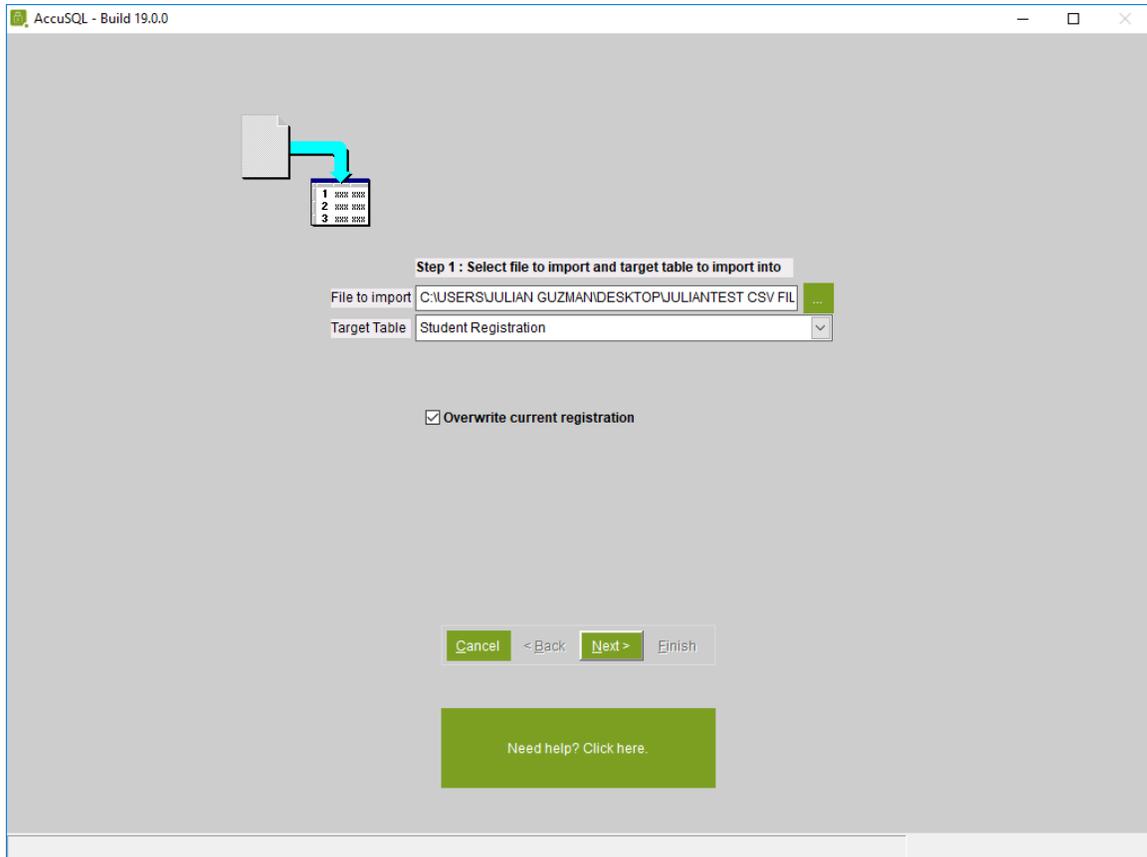
When importing activities, there are only two required fields, Category and Activity. You can also import the following fields (optional):

1. **Identification:** Could be a CRN number, course code, etc.
2. **Lab ID:** Note: No longer used. Use Activity-Lab Registration Import instead).
3. **Instructor's first name:** The professor(s) who teach the class.
4. **Instructor's last name:** The professor(s) who teach the class.
5. **Class days:** (If you want to import class schedules, use the days of the week the class is taught using this format: Mo Tu We Th Fr. So if the course is Monday and Wednesday, you would enter Mo We. If you want to use Mon Tues or Monday Tuesday that is also supported.

6. **From:** If you are importing the class days, enter the class start time using this format: 8:00AM. If the course starts at 6:00 PM, you would use 6:00PM. If the class starts at 4:30 PM, you would use 4:30PM.
7. **To:** If you are importing the class days, enter the class end time using this format: 9:00AM. If the course ends at 7:00 PM, you would use 7:00PM. If the class ends at 5:30 PM, you would use 5:30PM.



STUDENT REGISTRATION IMPORT

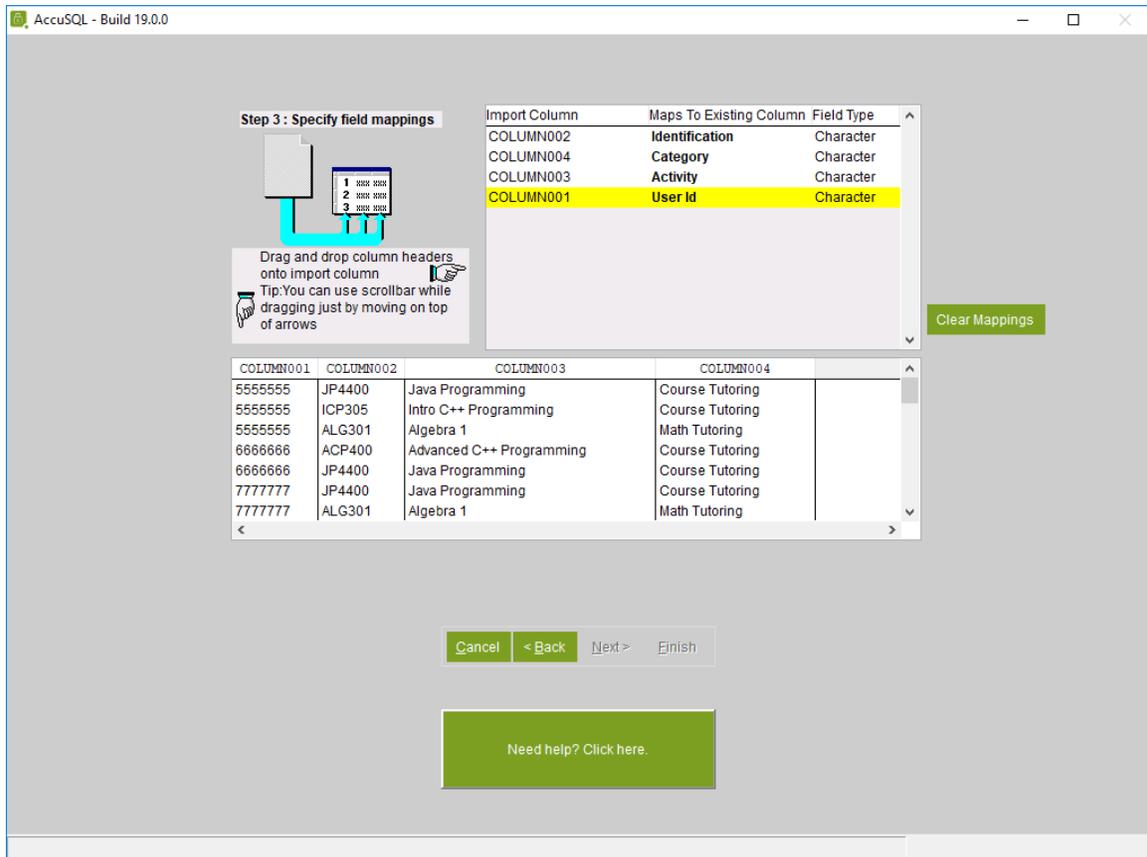


The registration import screen requires the User ID number (student ID number students use to sign in and out) and one or more fields that identify the class. For example, you can use one of the following combinations of fields for the import:

- ID, Category, Activity
- ID, Activity, and Identification
- ID, Activity
- ID, Identification.

The important thing is that class data can be resolved to a unique class in the AccuSQL/AccuTrack database. If not, then that row is not imported. In other words you are free to supply any combination of the fields but you need to supply a valid combination that would resolve to a unique class.

Note: If you check the “Overwrite current registration” box, AccuSQL/AccuTrack will replace the current registration data with the data you are importing. This is useful if you are importing a new and comprehensive registration data file that includes ‘dropped’ students. If you do not check this box, AccuSQL/AccuTrack will simply add new records in the import file to existing data.

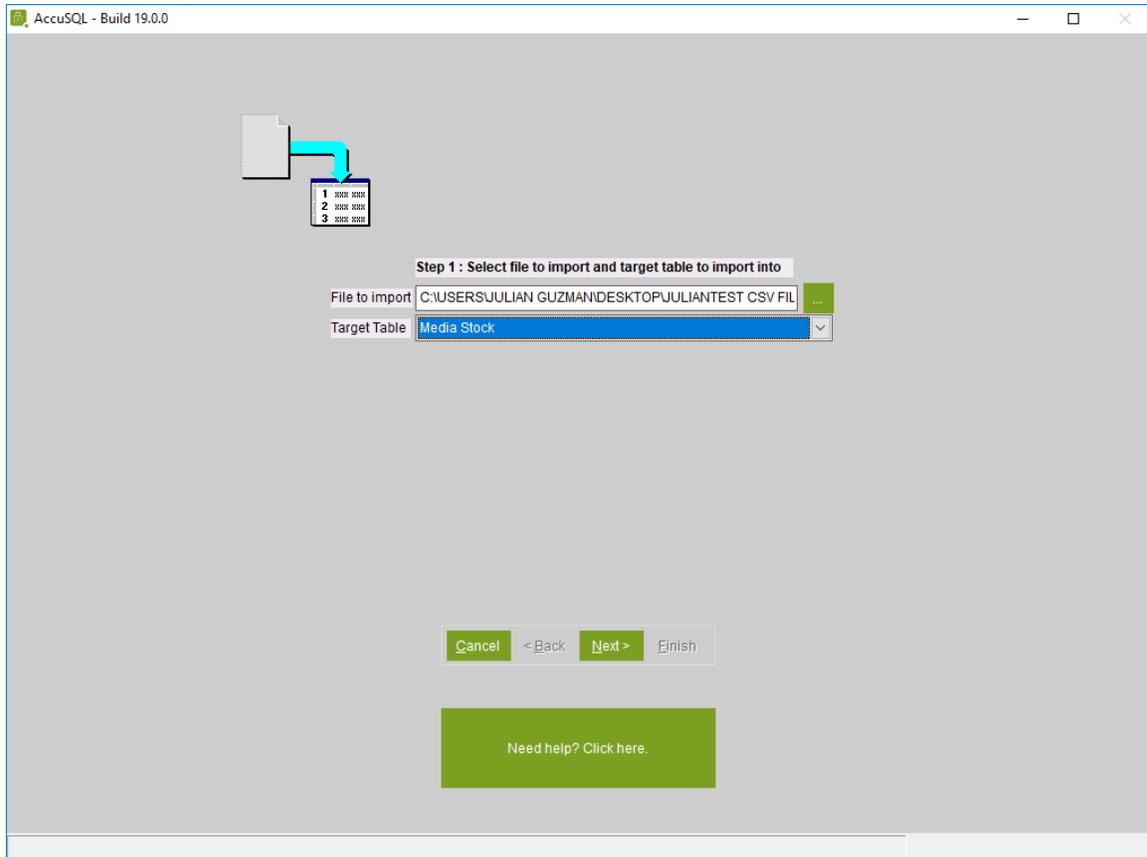


GRADES (PROGRAM ASSESSMENT) TABLE IMPORT

The Program Assessment module (explained in another section of this manual) requires grades of students before and after utilizing your program. You can either type the grades manually via the Assessment screen, or you can import the data via the Import Wizard. Required fields include Student’s ID number (same number students use to sign in and out) and a combination of the other fields that would identify a unique class in the AccuSQL/AccuTrack database (see *Importing Registration Data* above).

Note: You can import both grades together or each one separately.

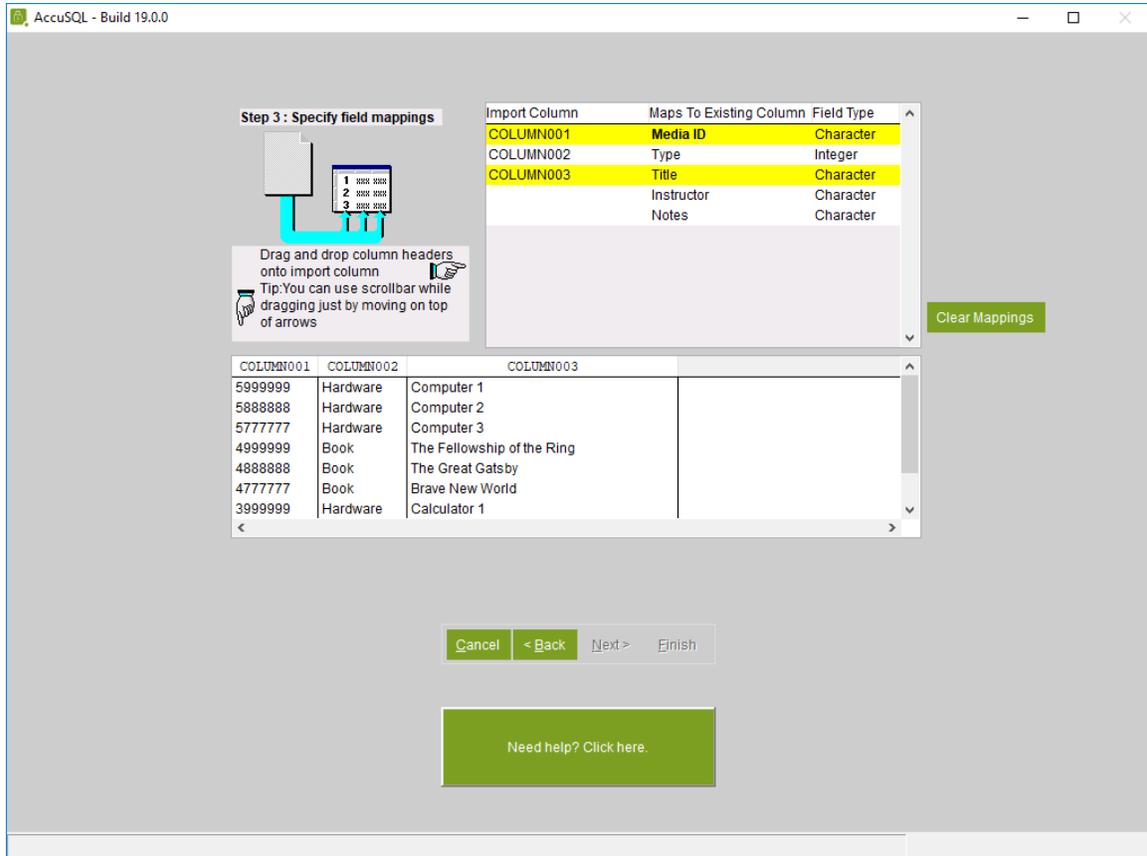
MEDIA STOCK IMPORT



If you use AccuSQL/AccuTrack for tracking media, you can import your media stock from a text file.

Required field includes the Media ID # (unique number you assign to each piece of media), and media title, type, Instructor's name and notes you have for this media.

Note: Media Types need to be defined before you do the import in the Media Check-out >> Media Stick Screen. Click Add and then the  button to add Media Types before you import.



Step 3 : Specify field mappings

Drag and drop column headers onto import column
 Tip: You can use scrollbar while dragging just by moving on top of arrows

Import Column	Maps To Existing Column	Field Type
COLUMN001	Media ID	Character
COLUMN002	Type	Integer
COLUMN003	Title	Character
	Instructor	Character
	Notes	Character

Clear Mappings

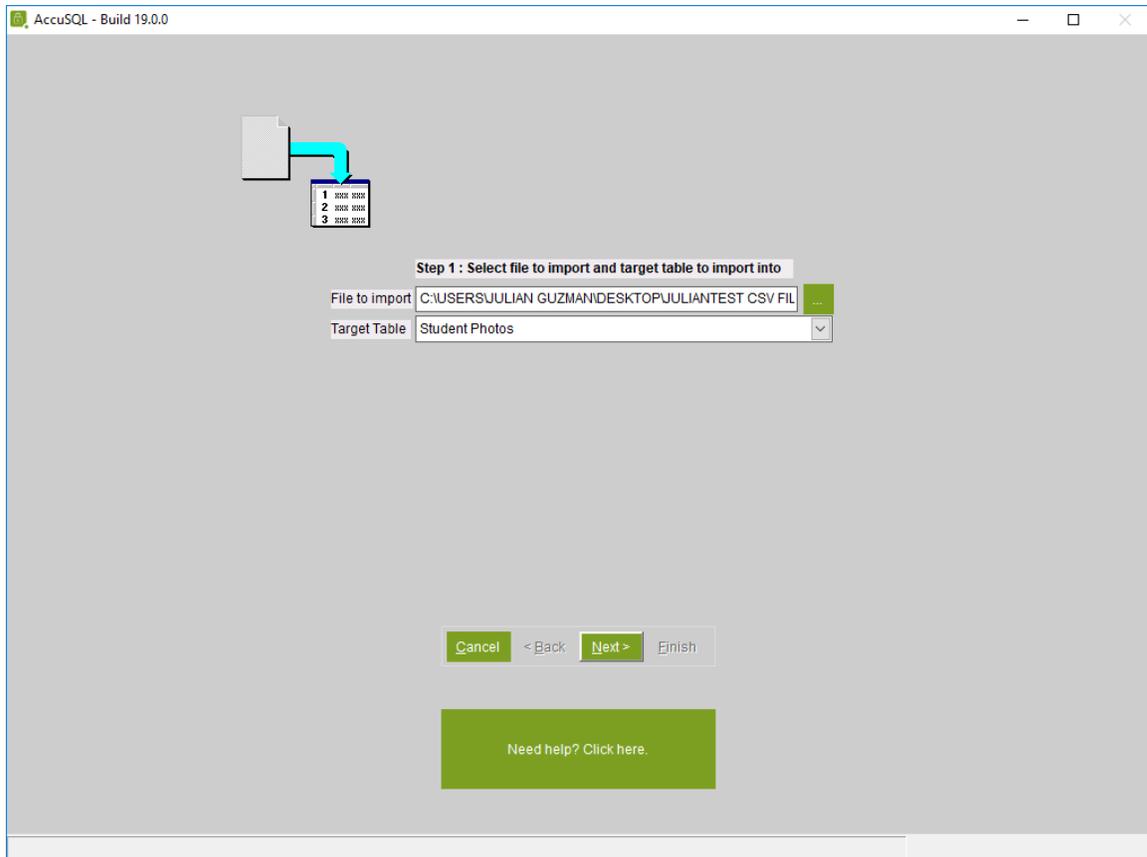
COLUMN001	COLUMN002	COLUMN003
5999999	Hardware	Computer 1
5888888	Hardware	Computer 2
5777777	Hardware	Computer 3
4999999	Book	The Fellowship of the Ring
4888888	Book	The Great Gatsby
4777777	Book	Brave New World
3999999	Hardware	Calculator 1

Cancel < Back Next > Finish

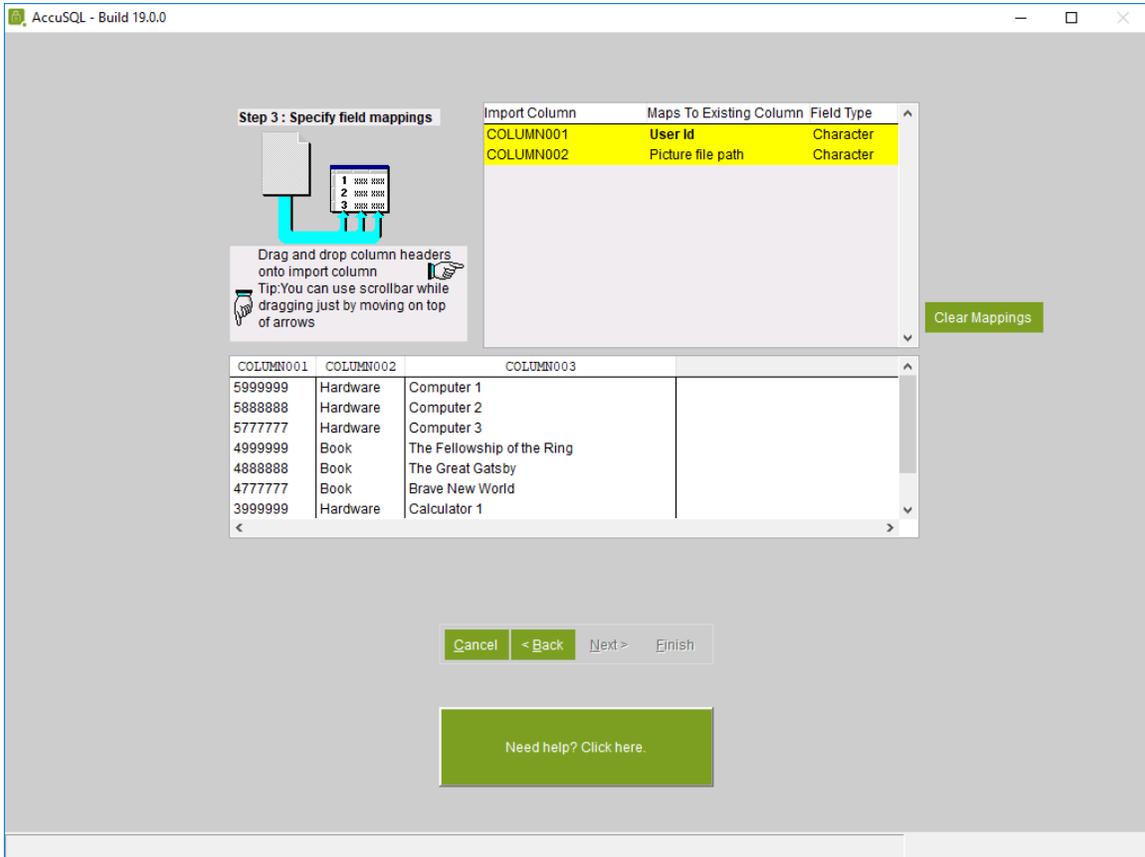
Need help? Click here.

STUDENT PHOTOS IMPORT

If you use the feature for confirming student's picture upon sign-in, you can use the Import Wizard to import the students' pictures.



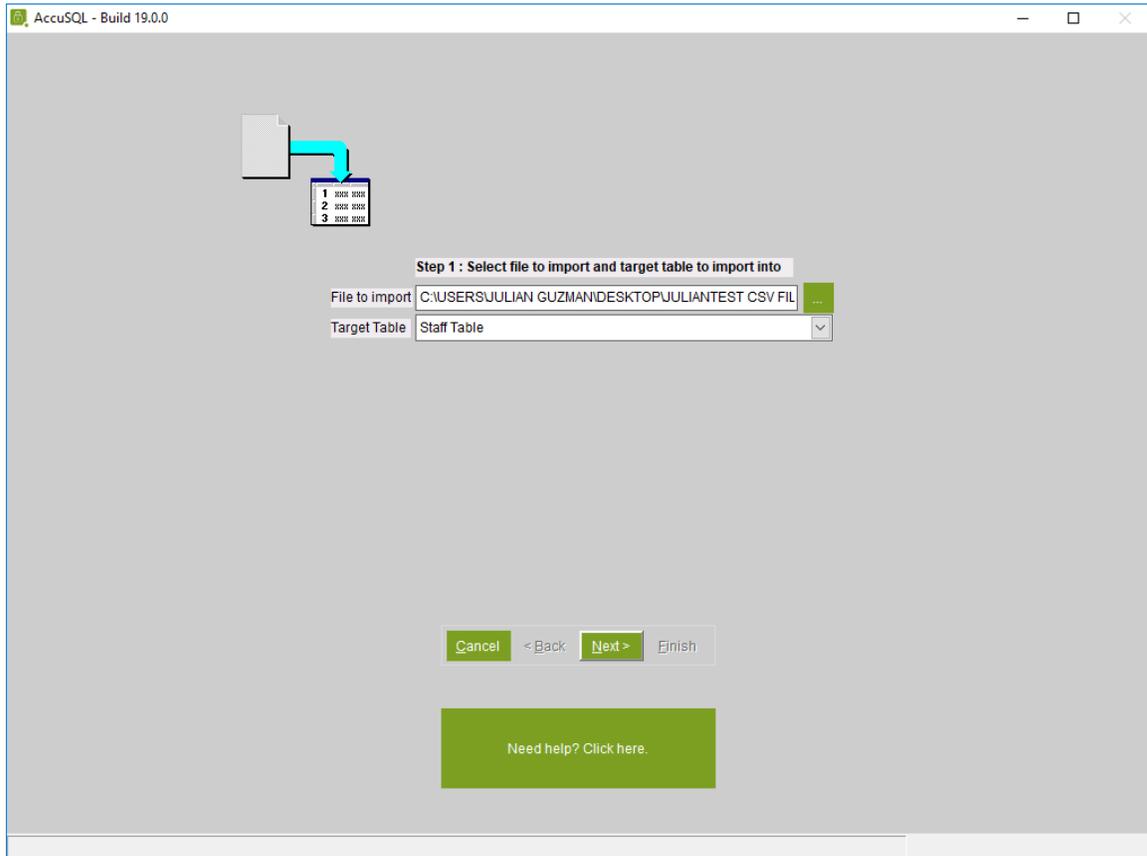
Only two fields are needed here, the student's ID number and the path and name of the file with the student's picture.



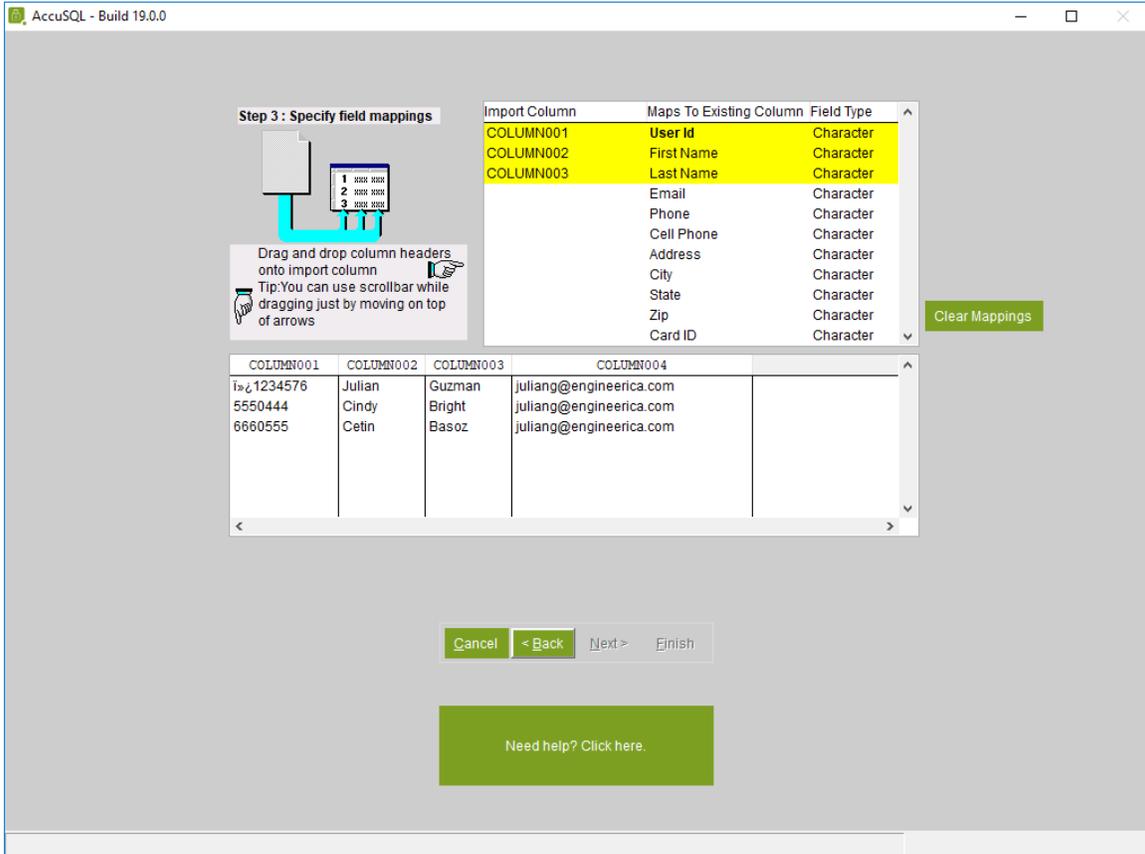
 **Note:** The pictures need to be in bmp, png, or jpg format.

STAFF (TUTORS) TABLE IMPORT

Staff/Tutors can be imported via the import feature to the Staff Table. This will save you time as you won't have to manually add each staff member individually.



If you have your tutor's data in an electronic file, you can import this data to AccuSQL/AccuTrack. Fields you can import include: tutor's ID number, first name, last name, email address, phone, address, city, state, zip, and card ID number (if different from tutor's ID number).



STUDENT-ACTIVITY-REGISTRATION (COMBINED) IMPORT

If you have a class roster file that includes students, class, and registration data, you can import the data in this file using the *Student-Activity-Registration combined* option.

Required fields include the category, activity identification, student's ID, student's first name, and student's last name.

Other fields you can import include activity other, lab ID, student's middle name, Class days, Class Start Time (From), Class End Time, (To), student's phone number, student's email address, student's address, card ID number (if different from student's ID number), and the student's profile data.

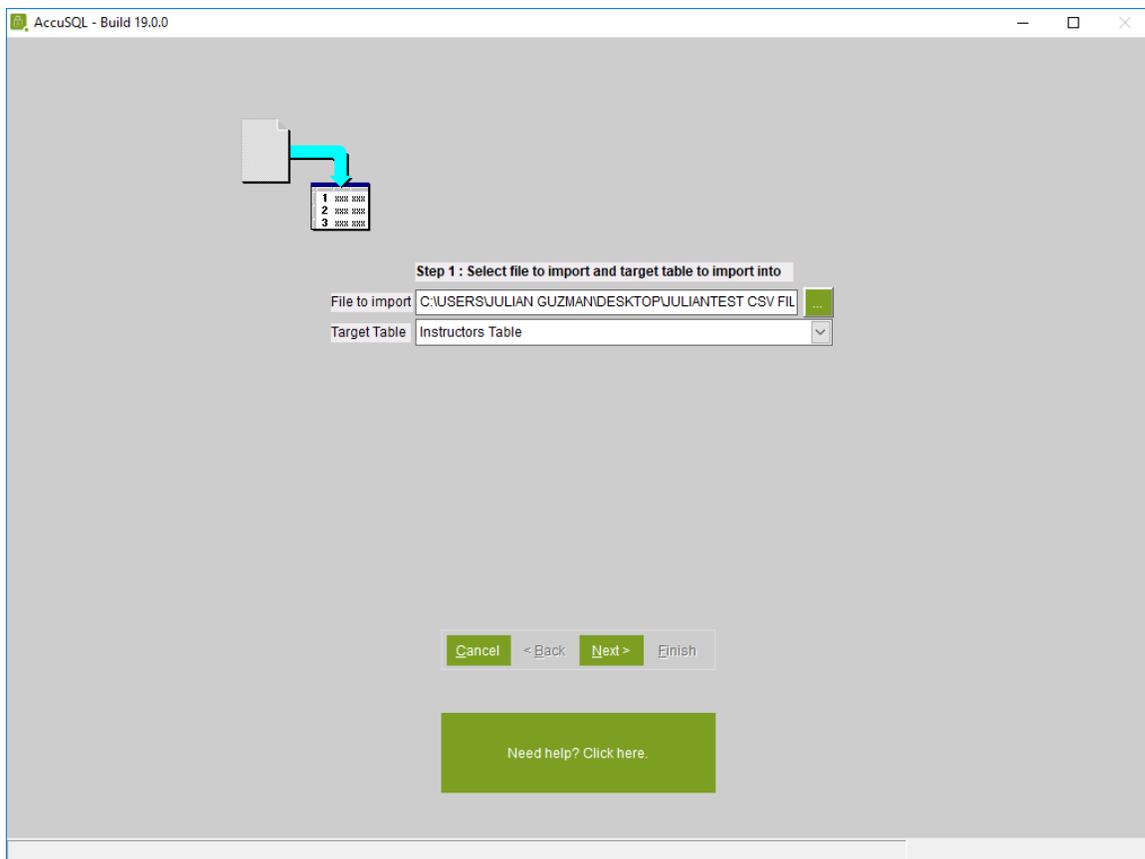
STUDENT GROUPS IMPORT

For the Student Groups import, all you need is the user id (student ID) and the group name.

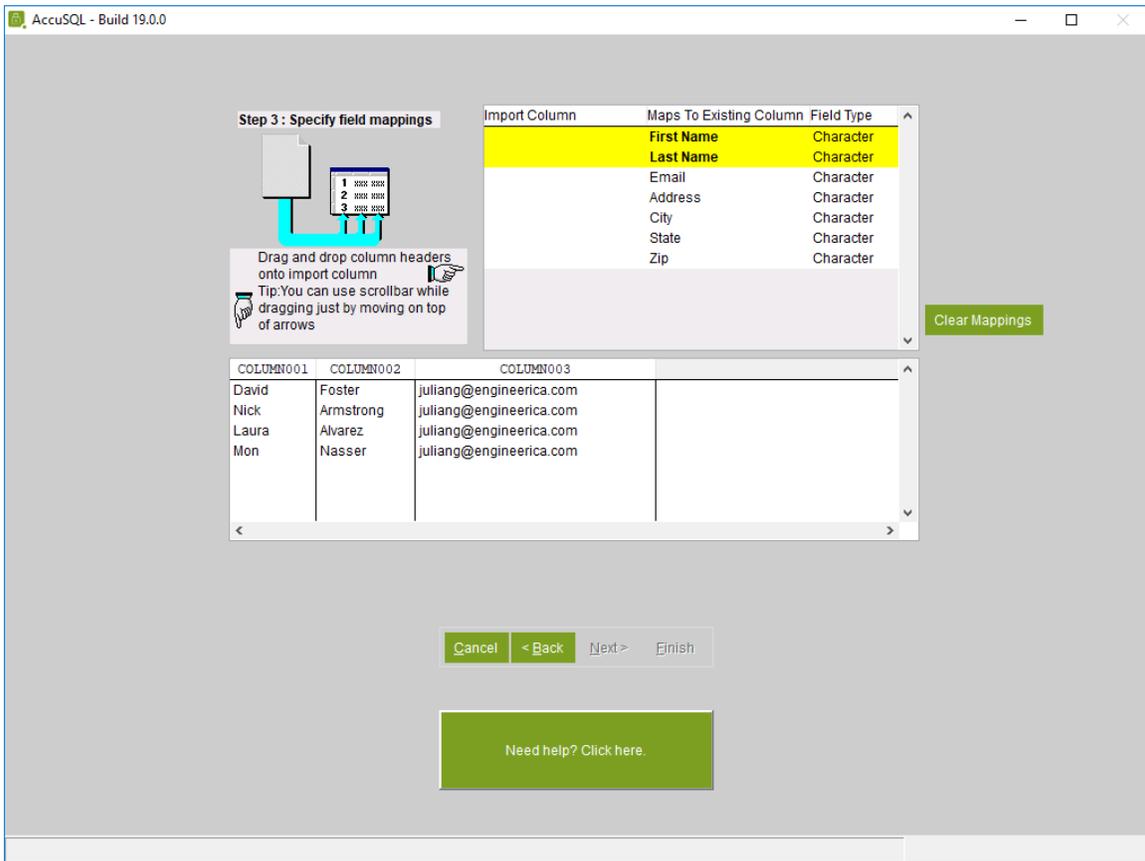
INSTRUCTORS TABLE IMPORT

This import allows you to add instructors to the database. Instructors are typically the professors that teach your classes.

Note: If you do an Activities import, you can add the Instructors directly to the activities (class) and then they will be automatically added to the Instructors table also.



Required fields include the First Name and the Last Name.



SEMINAR INFORMATION IMPORT

Use this import for special events you are hosting in your center.

For the Start, End, and Registration End fields, you would create them as follows: 11/01/2019 1:00PM, or 11/15/2019 16:00.

TUTOR ACTIVITY ASSIGNMENTS IMPORT

Use this import to assign your activities (classes) to the tutors who will be available to assist students with them. This would prevent you from having to manually do Add/Remove Assignments for each tutor in the Tutors screen.

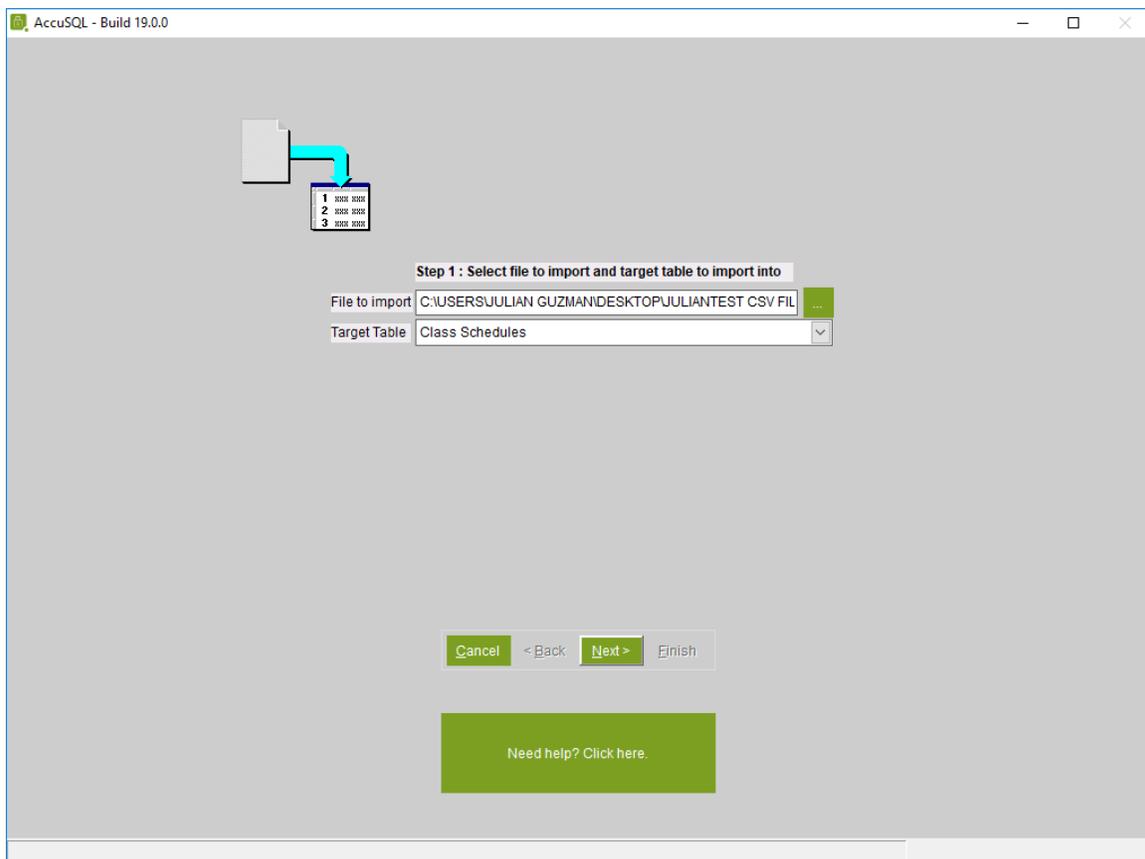
ACTIVITY – LAB REGISTRATION IMPORT

Use the Activity-Lab Registration import to import you activities (classes) into different local labs. You can have the same class assigned to multiple different local labs. When you set a sign in station to a particular local lab, then the activities assigned to that lab will be the ones that student will potentially be able to select when they sign in.

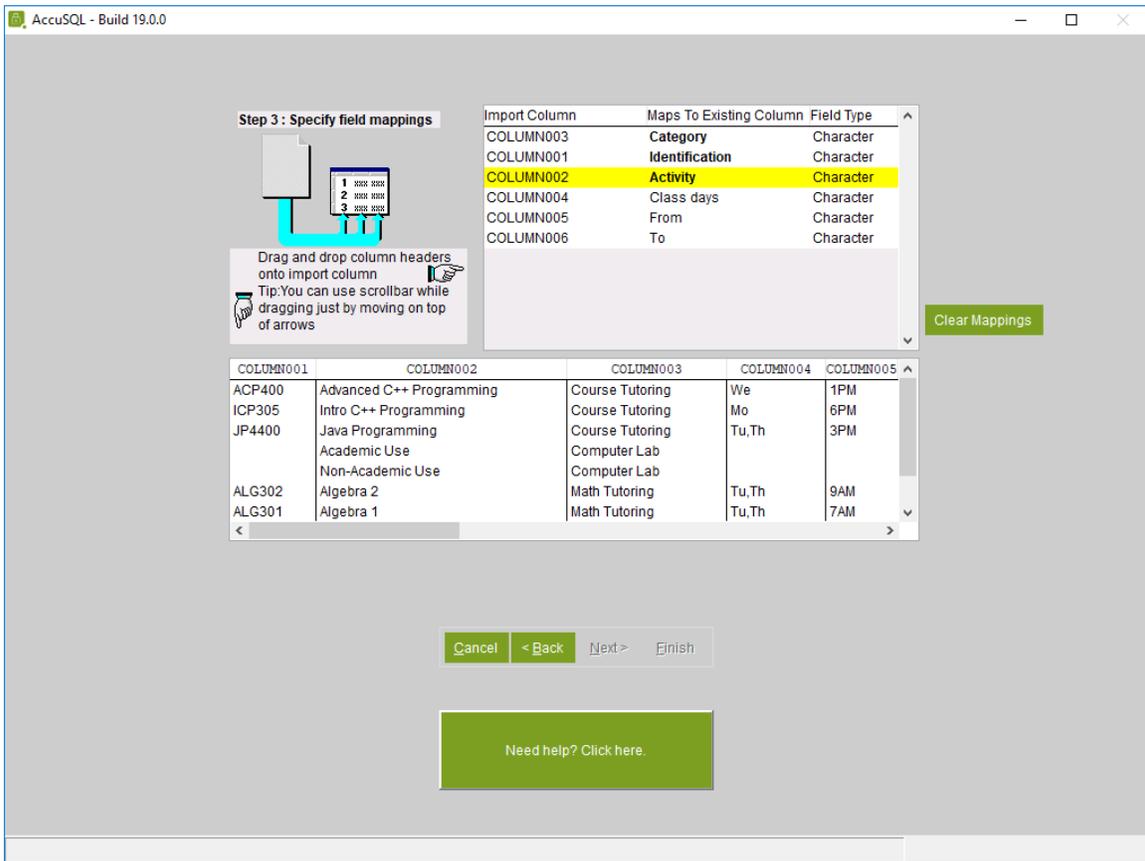
CLASS SCHEDULES IMPORT

Use the Class Schedules Import to import the schedules for classes that already exist in the database. Using this method, you will add the schedules for the activities in the import file.

Note: If you are importing new activities with schedules, you would use the Activity Table Import.



The only required field is the Activity column.



The format for importing the Class days, is as follows:

Mo

Tu

We

Th

Fr

Sa

Su

And the format for From and To (time), is as follows:

7:00AM

8:00AM

9:00AM

10:00AM

11:00AM

12:00PM

1:00PM

2:00PM

3:00PM

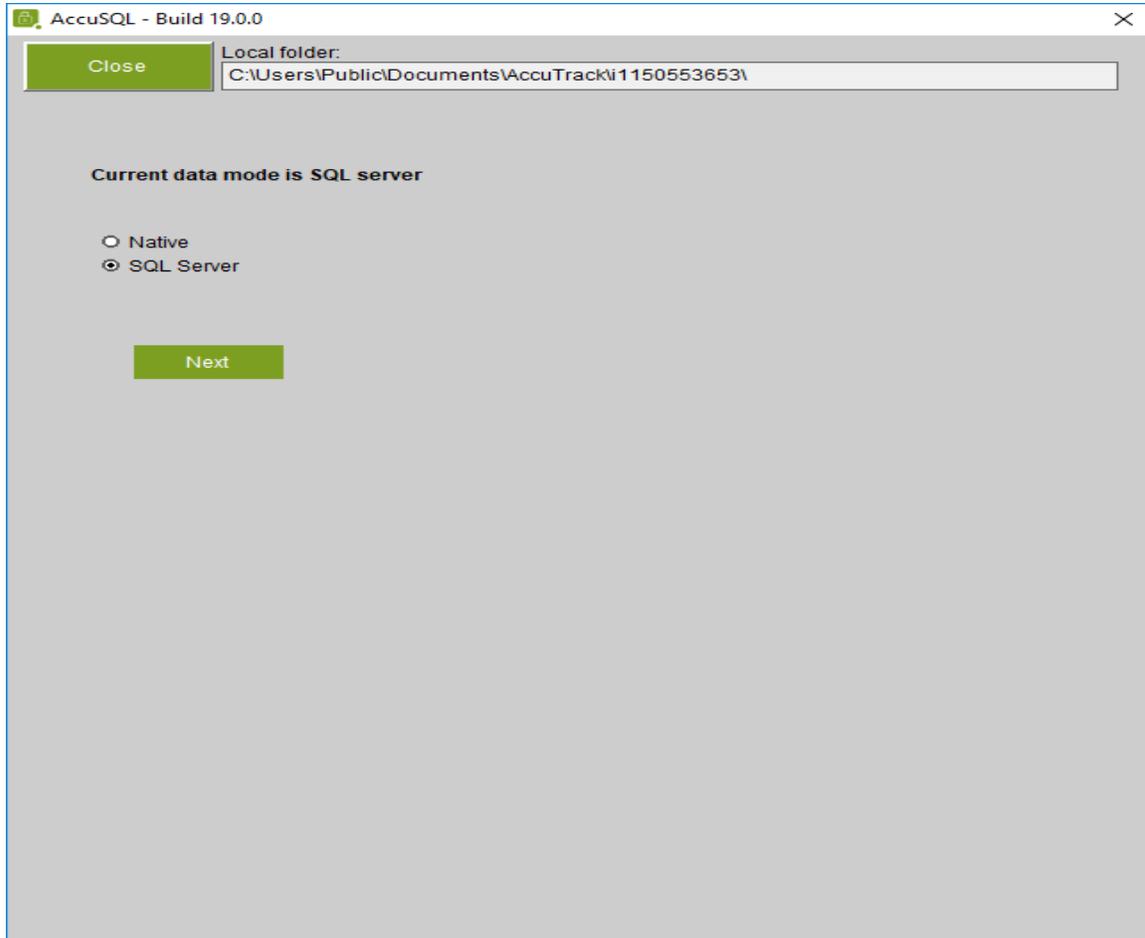
etc.

DATABASE LOCATION

Purpose: To check the location of your AccuSQL/AccuTrack files and to change this location if needed.

Access: From System Administration, click on Database>>Database Location.

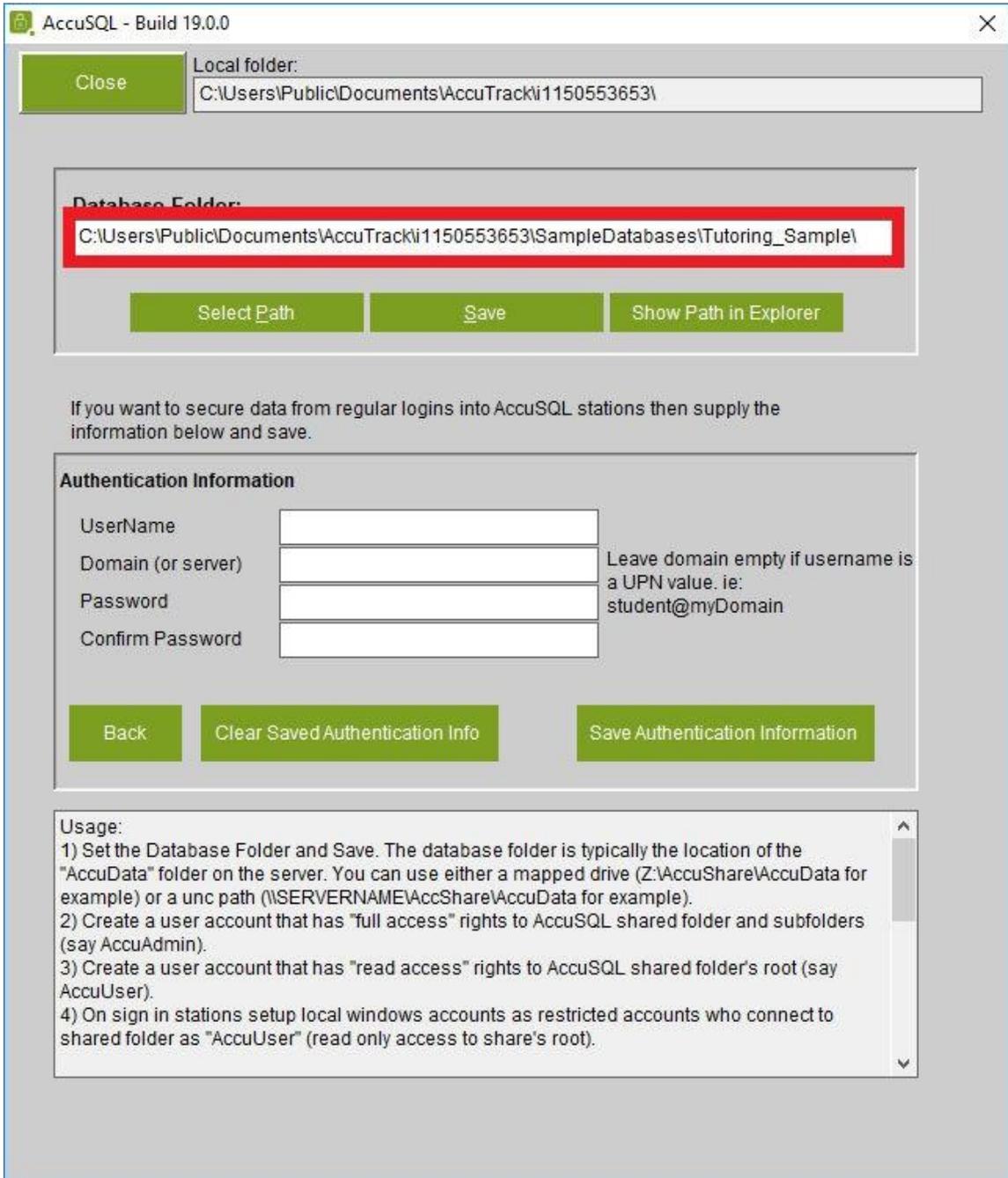
Use this screen find out the location of the AccuSQL/AccuTrack database files:



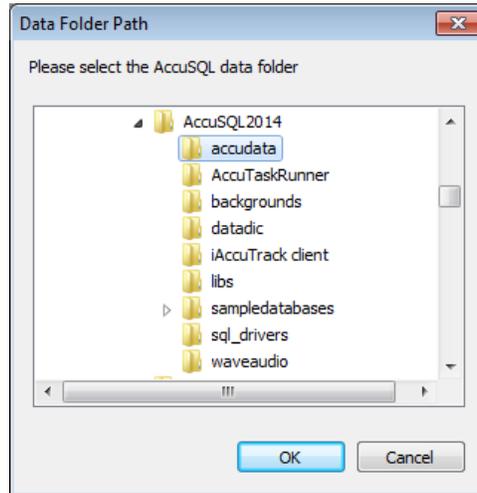
There are two database modes, Native and SQL Server. Native mode is the non-SQL Server mode that uses a file folder and file based data architecture. While you can run in Native mode, you will not enjoy the many benefits of using SQL Server. It is recommended that you use a SQL Server database as soon as one is transferred over for you, although if you are anxious to get started, you can begin building your database in Native mode, then transfer that database at a later time.

NATIVE MODE DETAILS

If you click the Native radio button in the Database Location screen, then click Next, you will see the settings for connecting to a folder/file based database. By default, AccuSQL/AccuTrack will be pointing to a Tutoring_Sample database in a public shared folder.



If you like, you can change the path in this box to another database location. This is useful for using shared database files on the server for example. To change the path, click on “Select Path” and use the browse window to select the new location. You can also type the new path in the text box. For example, if you want to point AccuSQL/AccuTrack to a blank database, you can click Select Path, and then select the AccuData database.



 **Tip:** If you change the path, you will need to restart AccuSQL/AccuTrack before the change takes effect.

Folder Access: For AccuSQL/AccuTrack to work properly, you must have read/write/modify permissions to the Native database you are pointing to. If other users will be pointing to that database on a shared drive, they would all need to have read/write/modify access. Since you should be using SQL Server mode, however, this is not mission critical. The Native database information would not be used at all in that case, but instead the connection information would be setup to a SQL Server database, not using Native mode, but instead using SQL Server mode.

SQL SERVER MODE DETAILS

If you click the SQL Server radio button in the Database Location screen, then click Next, you will see the settings for connecting to a SQL Server based database.

The screenshot shows the 'AccuSQL - Build 19.0.0' window. At the top, there is a 'Close' button and a 'Local folder:' field containing 'C:\Users\Public\Documents\AccuTrack\1150553653\'. Below this is a 'Shared folder:' section with a text box containing 'C:\Users\Public\Documents\AccuTrack\1150553653\SampleDatabases\' and two buttons: 'Select Path' and 'Show Path in Explorer'. The 'SQL server connection info' section is highlighted with a red border and contains the following fields: 'Server' (engserver, 60558\sqlexpress), 'Authentication mode' (SQL server authentication), 'UserName' (sa), 'Password' (masked with asterisks), 'Database' (Julian_TESTING), 'Owner' (dbo), and 'SQL Server Client Driver' (SQL Native Client). To the right of these fields is a 'Test Connection' button. At the bottom of the form are 'Back' and 'Save' buttons. A scrollable text box at the bottom provides instructions on how to use the form.

Use this form to set up the connection to the SQL Server database. Here is how:

- 1) Enter the Shared folder. This is a path to a shared folder used by all AccuSQL installations sharing the database. All users who will be accessing AccuSQL need to have read/write/modify access to this folder. Shared files, like customized reports and photos, are saved in this folder, or associated sub-folders.
- 2) Enter the SQL Server. A typical setting for SQLExpress installed on this machine is: [Server]\SQLExpress. Specify the port if you are not using the default 1433 port like this: [Server],portnumber\SQLExpress

Local Folder: The local folder is created by and maintained by the system.

Shared Folder: It is recommended that you use a shared folder on the network as the Shared AccuSQL/AccuTrack folder. All users (Windows logons) of AccuSQL/AccuTrack should have read/write/modify access to the shared folder and all files and folders under it. The Shared folder in AccuSQL/AccuTrack has several imports uses, including:

- **Shared reports:** The report templates for customized and/or memorized reports are stored in a UserReports folder under the Shared Folder.
- **Pictures:** Any photos of students and tutors that you have added or imported are stored in a PICTURES folder under the Shared Folder.

Updates: If a user downloads a software update, the update files are stored in an UPDATES folder under the Shared Folder. Using that method, AccuSQL/AccuTrack will check for updates on each computer that opens it and then copy any update files it finds when it open back to itself so the updates only be downloaded once the they will replicate to the other AccuSQL/AccuTrack users who are pointing to the same Shared Folder.

- **Local Lab settings:** If you are using different local labs in conjunction with the Intake System or Activity Waiting List feature, the Shared Folder stores local lab settings. Using this method, each Local Lab can have its own intake queue.

SQL server connection info: In this area, you will enter the connection information to connect to the SQL Server database, as follows:

- **Server:** This is the SQL Server instance you will be connecting to. If you are using a particular port, other than the default 1433 port, you would enter it like this: <SERVERNAME>,port\instance (note the comma).
- **Authentication mode:** This would typically use SQL server authentication.
- **Username:** This is the user that is connecting. If you transfer a database to SQL Server (discussed later) and you create a public account at that time (recommended) you can use the public username here.
- **Password:** This is the password for the user that is connecting. If you transfer a database to SQL Server (discussed later) and you create a public account at that time (recommended) you can use the public username's password here.
- **Database:** Click the drop-down box to select from the databases that are available for the instance specified. Be patient, it may take a few seconds to populate. If you do not have an AccuSQL/AccuTrack database available in the drop-down list, you will need to transfer one to SQL Server (discusses later).
- **Owner:** You can leave this field blank.
- **SQL Server Client Driver:** Select the SQL client OLD DB provider you are using to connect to the database. Depending what is installed on the client, you may be using the native client, native

client 10, or native client 11. If you get an OLE iDispatch error when you try to connect, you may need to install the native client. The installer is located in the AccuSQL/AccuTrack installation folder under a folder called sql_drivers. There is a 32-bit (sqlncli.msi) and a 64-bit (sqlncli_x64.msi) available. Make sure you check your Computer Properties to determine your system type to ensure you install the proper driver for your system.

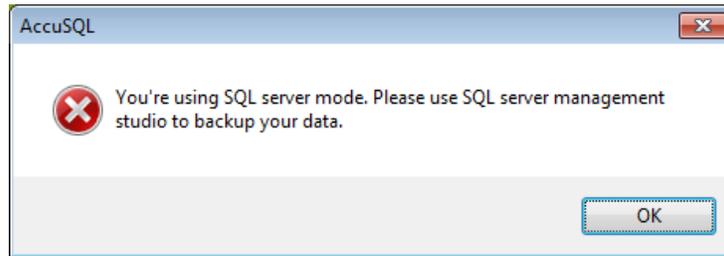
Test Connection: After you have entered the connection information above, click this button to verify you are able to connect to the SQL Server database. If so, you will get a Test Connection succeeded” message. If not, double check your connection information.

Save: After you have successfully tested the connection, click Save to save the information. It will be saved in an encrypted file in your local folder. You now need to exit AccuSQL/AccuTrack completely and then reopen it to access the database you selected.

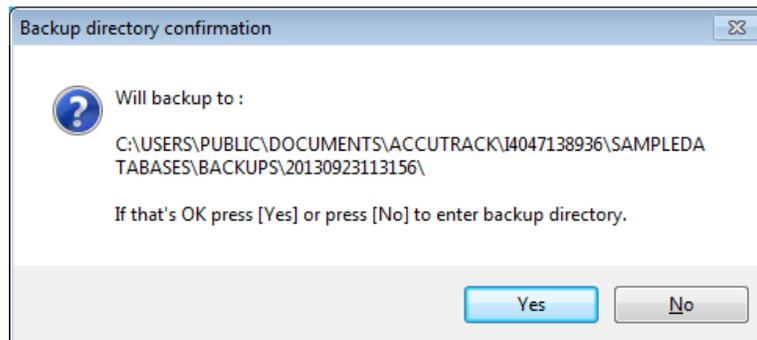
BACK UP

Access: From System Administration, click Database → Back up.

If you are operating AccuSQL/AccuTrack in SQL Server mode, then backups are handled in SQL Server itself. When you click Back up in SQL Server mode, you will see the following message:



If you are in Native mode, and click Backup, you have the ability to back up your Native database. The database will back up to your database folder in a BACKUPS folder. The database backup name is the year, month, day, hour, minute, and second you backed up the database:

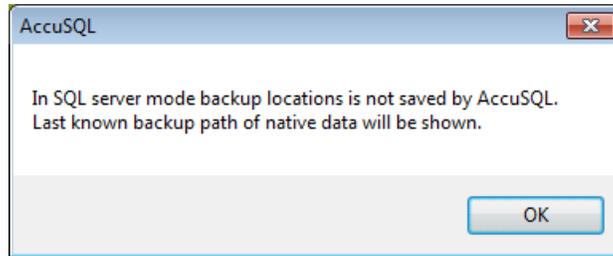


Note: While your SQL Server administrator should have a backup/replication/recovery plan already setup for your SQL Server database(s), it is never a bad idea to verify that. Better safe than sorry!

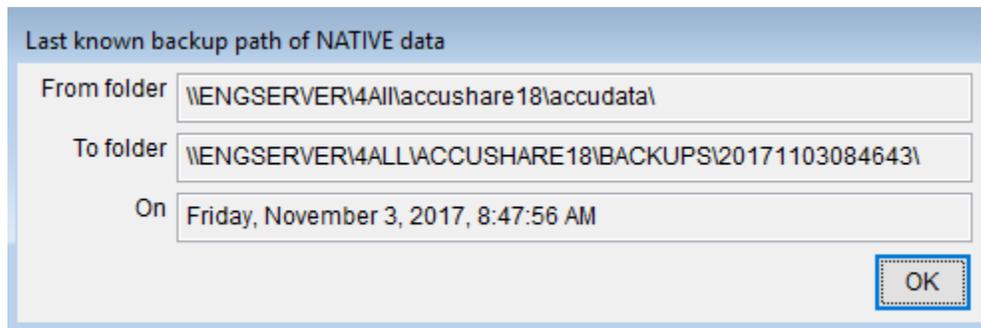
LAST BACKUP LOCATION

Access: From System Administration, click Database → Last Backup Location.

In SQL Server mode, the backup location is not used, so when you click this option, you will see the following message:



and then AccuSQL/AccuTrack will show the last backup path to your Native database (if any).



CLEAN

Access: From System Administration, click Database → Clean.

In SQL Server mode, clean is not used since that is handled by SQL Server directly. In Native mode, clean will permanently remove any records marked for deletion and re-index the database.

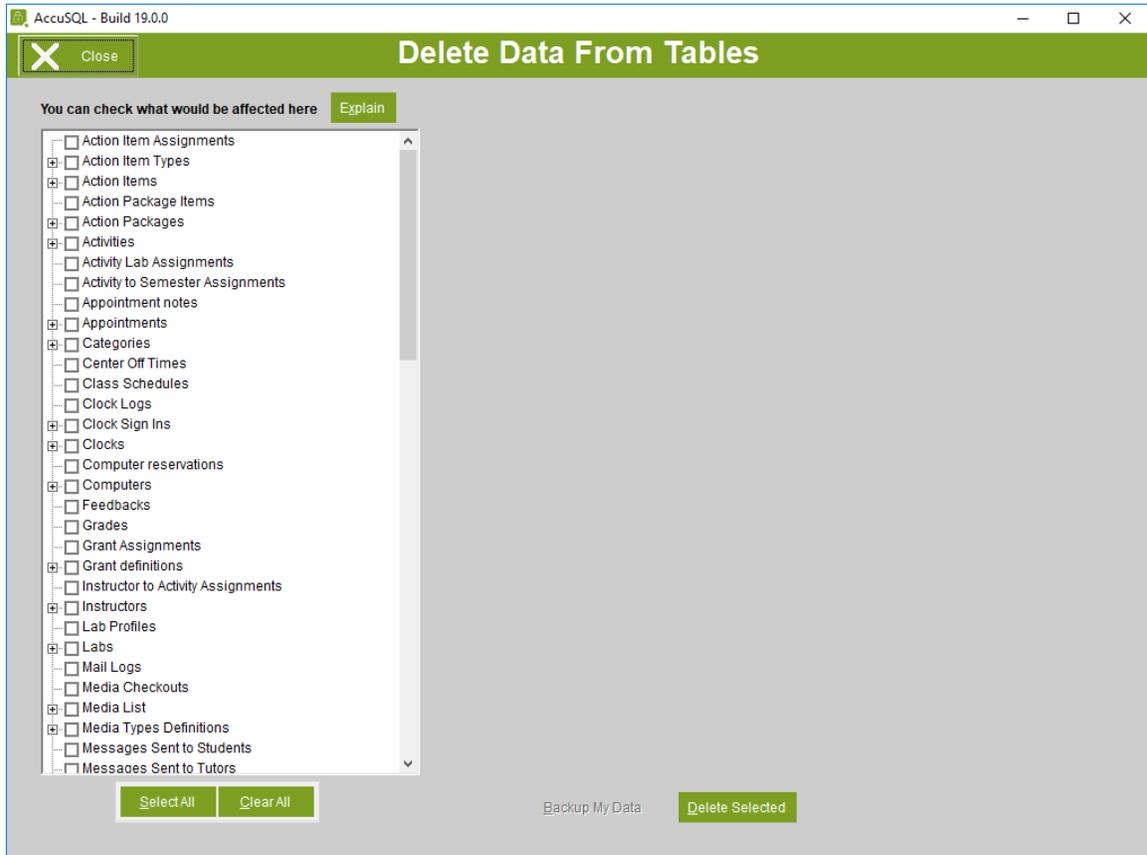
DELETE

Access: From System Administration, click Database → Delete.

Delete is used to remove all data from various tables in AccuSQL/AccuTrack. When you do a database delete, all that data from the table(s) you specify will be deleted. This feature is helpful if you have archived (saved) your old database and now you want to use a copy of it for a new semester. Using this method, you can point AccuSQL/AccuTrack to the archived database when you want to run report from the past, but then you can delete all the data from the current database. So for example, you can delete your student, activities, tutors, and instructors so you can import them anew, but you will be able to retain all your setup options and will not have to recreate them as you would if you were to transfer a blank database to SQL Server.

Important: Make sure you backup your database prior to performing any delete operations. When you delete the data, it is irreversible.

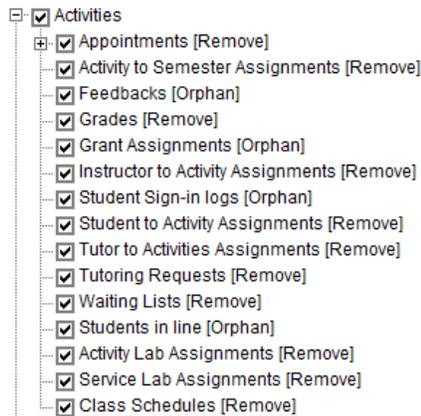
When you click on the “Delete” button, the following box appears:



To delete the records of a specific table, simply check the box next to it.

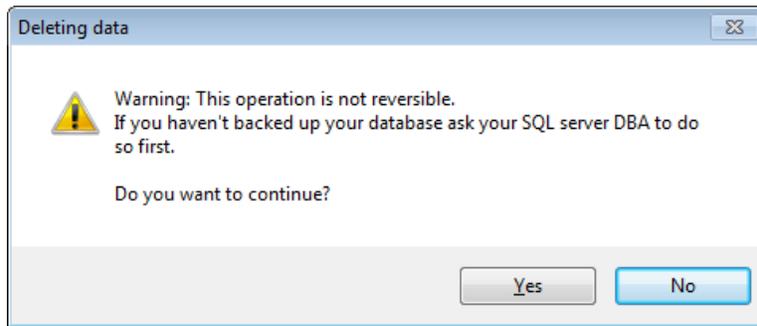


You will notice that some tables have a plus sign (+) next to them. This indicates that deleting this table affects other tables. To see the tables affected, click the plus sign. AccuSQL/AccuTrack will display the affected tables and show how they are going to be affected:



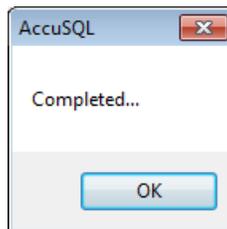
The screenshot above for example shows that if you delete the Activities data, the Appointments data will be deleted too ([Remove]). Other affected tables include the Grant Assignments table, which will still have records but will be missing a piece of these records ([Orphan]) (activity or class of the student).

After selecting the tables, click on the “Delete Selected” button to proceed with the deletion. You will get a warning message. If you are sure your data is backed up and you want to proceed, click Yes:



AccuSQL/AccuTrack will delete the records in the selected tables and their affected tables and it will update you on the progress:

When the operation is finished, you will see a confirmation box:



Note: The delete operation requires **exclusive** access to the database. In a network environment, you need to make sure that no one else is using the database files before trying to

delete the records.

 **Tip:** To delete all records in all tables, click on the “Check All” button.

The following is a list of the data tables you can delete and what they mean:

Selection	Deletes
Activities	Deletes the students' activities
Appointments	Deletes all appointments, past and future.
Categories	Deletes the student's categories.
Center off times	Deletes the center's off-times.
Feedbacks	Deletes student's feedback including ratings and comments.
Grades	Deletes all grades.
Grant assignments	Deletes grants' assignments.
Grant definitions	Deletes grants' definitions.
Instructor to activity assignments	Deletes instructor to activity assignments.
Instructors	Deletes all instructors names entered in the "Instructors" screen.
Media checkouts	Deletes all the media check in and out records.
Media list	Deletes all the media stock records entered through the "Maintain

	Media" screen.
Media types definitions	Deletes the media types entered via the "Edit Media Types" box.
Messages to students	Delete all messages sent to students through the "Messaging Center" screen.
Messages to tutors	Delete all messages sent to tutors through the "Messaging Center".
Pay rate definitions	Deletes the tutors' pay rate definitions.
Pictures	Deletes all pictures.
Profile definitions	Deletes the students' profile answers.
Room reservations	Deletes all room reservations.
Rooms	Deletes all rooms.
Scale definitions	Deletes survey scale definition.
Semester definitions	Delete all semesters.
Seminars	Delete all seminars.
Service types	Deletes all service types.
Session comments	Deletes session logs.
Sports definitions	Deletes the sports definitions.
Sports required hours	Deletes sports required hours.

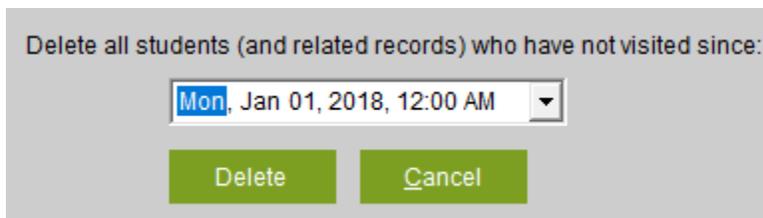
Student contacts	Deletes the students' contacts.
Student group assignments	Deletes students' assignments to groups.
Student group definitions	Deletes student's groups.
Student sign-in logs	Deletes all students' sign-in and sign-out records.
Student to activity assignments	Deletes students' registration info.
Student to seminar registrations	Deletes students' registration to seminars.
Student to sports assignments	Deletes student's registration to sports.
Students	Deletes all students.
Tutor activities	Deletes all the tutor's tasks entered through the Staff "Modify Tasks" screen
Tutor categories	Delete all the tutor's categories.
Tutor off times	Deletes all tutors' off times.
Tutor schedules	Deletes all the schedules entered through the "Schedules" screen.
Tutor sign-in logs	Deletes all tutor sign-in and sign-out records.
Tutor to activities assignments	Deletes tutor's service assignments.
Tutoring requests	Deletes tutoring requests.
Tutors	Delete all the tutors.

User messages	Delete all messages sent to tutor via the "Messaging Center".
Waiting lists	Deletes waiting list records.

PURGE

Purpose: To delete student records from the database who haven't visited the center in a specified amount of time.

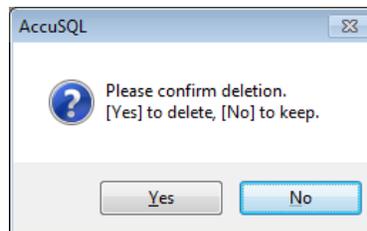
Access: From System Administration, click on Database → Purge.



Enter the date before which you want to purge the data. For example, if you entered Thu, Jun 15, 2019, 12:00AM then all student data (and associated sign in/out logs, etc.) for students who have not signed into AccuSQL/AccuTrack since June 15, 2019 will be removed.

Important: Make sure you have backed up your database prior to purging any data. The Purge process is irreversible.

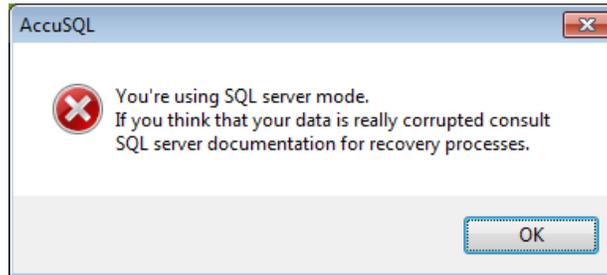
Click Delete to complete the operation. You will get a pop-up message confirming you want to purge.



Click Yes to delete the data.

REPAIR

If you are in SQL Server mode, Repair is not used since it is handled directly in SQL Server. When you click Repair in SQL Server mode, you will get the following message:



In Native mode, you can click repair and AccuSQL/AccuTrack will run a process to fix any data that may have become corrupted.

TRANSFER DB TO SQL

Purpose: To transfer a native database to SQL Server.

Access: From System Administration, click Database>>Transfer DB to SQL.

The screenshot shows the AccuSQL - Build 19.0.0 application window. At the top left is a 'Close' button. The main area is divided into three sections:

- Native data path to transfer:** A text box contains the path 'C:\Users\Public\Documents\AccuTrack\1150553653\SampleDatabases\Tutoring_Sample\'. Below it are 'Select Path' and 'Show Path in Explorer' buttons.
- SQL server connection info (SQL server admin role account):** This section contains several input fields:
 - Server: engserver, 60558\SQLExpress
 - Authentication mode: SQL server authentication (dropdown)
 - UserName: sa
 - Password: *****
 - Database: AccuSQLDB2019
 - Owner: dbo
 - SQL Server Client Driver: SQL Native Client (dropdown)
 To the right of these fields is a checked checkbox labeled 'Create a public account for this database'. Below the checkbox are two more text boxes: 'AccuTrack' and '****'. At the bottom of this section are 'Test Connection' and 'Transfer data' buttons.
- Instructions:** A scrollable text area at the bottom contains the following text:

Use this screen to transfer a native database to SQL Server. Here is how:

 - 1) Select the path to the existing native database you want to transfer to the SQL Server. This database needs to be in version 9.0 database format or later.
 - 2) Specify SQL Server instance in the Server field
 - 3) Specify authentication mode and SQL Server account username/password (SQL server admin role)
 - 4) Specify a database name for SQL Server database (this is a "new" database)

Use this option to transfer a Native database to SQL Server. This is typically used if you have been running a version of AccuTrack and have now upgraded to AccuSQL/AccuTrack (congratulations). It can also be used if you have been building a database in Native mode while waiting for IT to get SQL Server up and running and now you want to transfer that database to SQL Server. Since you are required to use a SQL Server System Administrator (sa) account to transfer the database, if you are not that, you would need him or her to perform this step for you.

Native data path to transfer: This is the path to the native database you will be transferring. If it was an AccuTrack database, it would typically be out on a share and be named AccuData, If you were running AccuTrack in the past, you can log into AccuTrack and go to Database >> Database Location to find that path.

Server: Enter the SQL server name (or IP address), port (if other than the default 1433) and the instance name of the SQL Server where you want to transfer the database.

Authentication mode: From the drop down list, select if you want to connect to SQL Server either using Windows authentication or else SQL server authentication. You use either, but are required to have sa access to create the database, else the process will fail.

Username: If you are using SQL Server authentication, enter the sa account you are using to transfer the database.

Password: If you are using SQL Server authentication, enter the password for the sa account you are using to transfer the database.

Database: Type the name you want to give the database. The name cannot already exist in SQL Server, or the process will fail.

Owner: You can leave this field blank.

SQL Server Client Driver: Select the SQL client OLD DB provider you are using to connect to the database. Depending what is installed on the client, you may be using the native client, native client 10, or native client 11. If you get an OLE iDispatch error when you try to connect, you may need to install the native client. The installer is located in the AccuSQL/AccuTrack installation folder under a folder called sql_drivers. There is a 32-bit (sqlIncli.msi) and a 64-bit (sqlIncli_x64.msi) available. Make sure you check your Computer Properties to determine your system type to ensure you install the proper driver for your system.

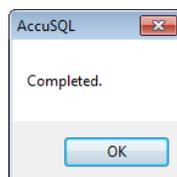
Create a public account for this database: Check this box if you want to create a public account to use to connect the clients to the database. It is recommended you let AccuSQL/AccuTrack create the public account at this time since we are writing specific grant executes for the public account. If you create the public account, enter the username and password (both case sensitive) for the account.

Test Connection: After you have entered the connection information above, click this button to verify you are able to connect to the SQL Server database. If so, you will get a Test Connection succeeded" message. If not, double check your connection information.

Transfer data: Click this button to transfer the database to SQL Server. After you click Transfer data, you will see a couple of screens appear. The first is the quick transfer of data for the tables that typically have a large number of rows:

Followed by a transfer of the remaining tables.

After the transfer is complete you will get a message indicating the database is now ready for use.

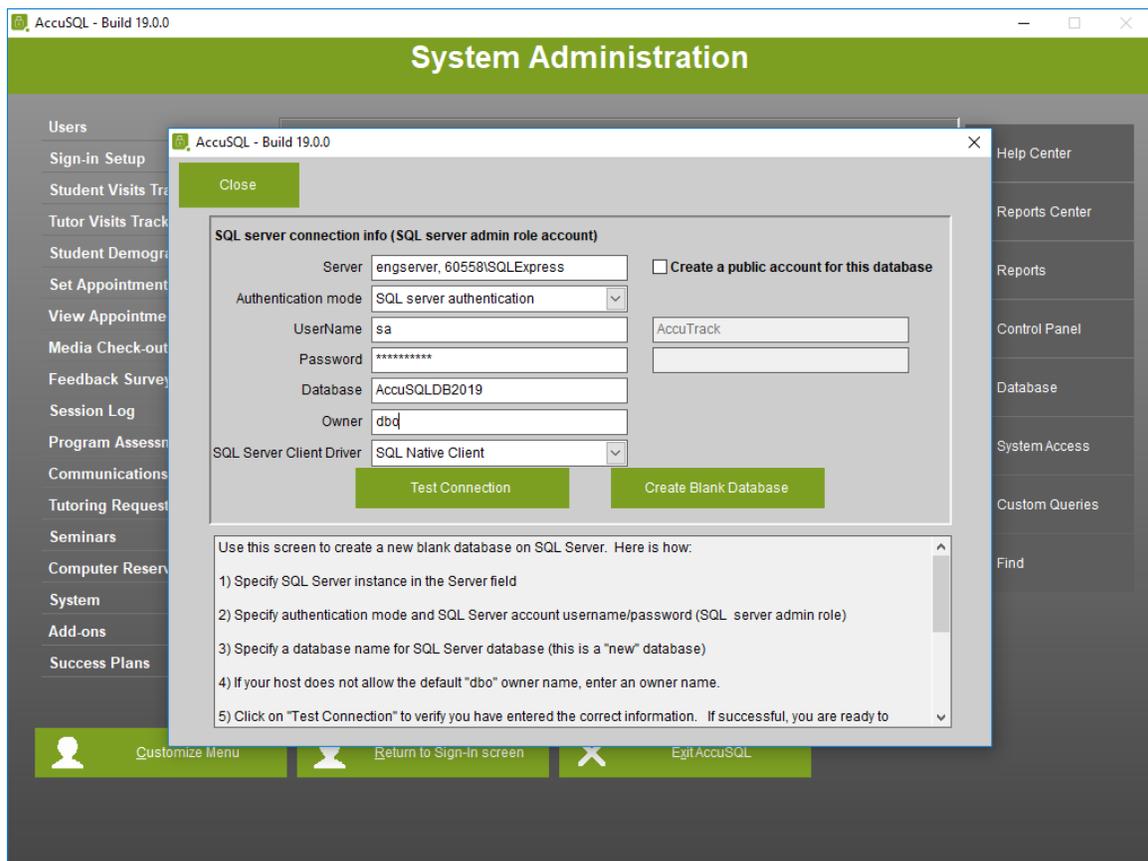


Note: Once the database is transferred, go to Database >> Database Location >> SQL Server to connect to it. After you have successfully connected, you must Save and then completely exit and reopen AccuSQL/AccuTrack for the changes to take effect.

CREATE BLANK SQL DB

Purpose: To create a blank database in SQL Server.

Access: From System Administration, click Database >> Create Blank SQL DB.



Server: Enter the SQL server name (or IP address), port (if other than the default 1433) and the instance name of the SQL Server where you want to transfer the database.

Authentication mode: From the drop down list, select if you want to connect to SQL Server either using Windows authentication or else SQL server authentication. You use either, but are required to have sa access to create the database, else the process will fail.

Username: If you are using SQL Server authentication, enter the sa account you are using to transfer the database.

Password: If you are using SQL Server authentication, enter the password for the sa account you are using to transfer the database.

Database: Type the name you want to give the database. The name cannot already exist in SQL Server, or the process will fail.

Owner: You can leave this field blank.

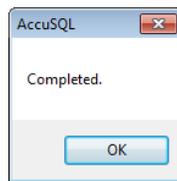
SQL Server Client Driver: Select the SQL client OLD DB provider you are using to connect to the database. Depending what is installed on the client, you may be using the native client, native client 10, or native client 11. If you get an OLE iDispatch error when you try to connect, you may need to install the native client. The installer is located in the AccuSQL/AccuTrack installation folder under a folder called sql_drivers. There is a 32-bit (sqlIncli.msi) and a 64-bit (sqlIncli_x64.msi) available. Make sure you check your Computer Properties to determine your system type to ensure you install the proper driver for your system.

Create a public account for this database: Check this box if you want to create a public account to use to connect the clients to the database. It is recommended you let AccuSQL/AccuTrack create the public account at this time since we are writing specific grant executes for the public account. If you create the public account, enter the username and password (both case sensitive) for the account.

Test Connection: After you have entered the connection information above, click this button to verify you are able to connect to the SQL Server database. If so, you will get a Test Connection succeeded" message. If not, double check your connection information.

Create Blank Database: Click this button to create the database in SQL Server. After you click Create Blank Database, the tables will transfer over to SQL Server.

After the transfer is complete you will get a message indicating the database is now ready for use.



Note: Once the database is transferred, go to Database >> Database Location >> SQL Server to connect to it. After you have successfully connected, you must Save and then completely exit and reopen AccuSQL/AccuTrack for the changes to take effect.

SYSTEM ACCESS

Purpose: To create access groups and then assign user to them in AccuSQL/AccuTrack.

Access: From System Administration, click on Database>>System Access.

MY ADMIN ID

Purpose: Change administrator's ID.

Access: From System Administration, click System Access>>My Admin ID.

The **administrator ID** is the special number you enter in the Main Sign-in screen to bring up the password text box and access the System Administration screen. To change this ID, click on the My Admin ID button. The "Change Administration ID" dialog box will appear.

AccuSQL - Build 19.0.0

Current ID:

Password:

New ID:

Enter the ID you used to access System Administration, and then enter your current password in the "Password" text box. If the password is correct, the "New ID" text box appears. Type the new Administrator ID, and then click the "OK" button to save it. To keep the old Administrator ID, click on the "Cancel" button instead.

 **Tip:** Make sure you remember your new ID. You need it to access the System Administration area. Also, the password is cAsE sEnSiTiVe.

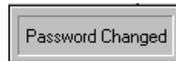
MY PASSWORD

Purpose: Change administrator's password.

Access: From System Administration, click on **Setup>>System Access>>Password**.

The administrator password is used to access the System Administration screen. Use this screen to change the password.

Enter the ID you used to access the System Administration area in the first text box. Next type in your current password then hit the <Enter> key. The "New Password" and "Confirm" text boxes will appear. Type in the new password in the "New Password" text box, and then type it again in the "Confirm" text box. Hit the <Enter> key or Click on "OK". If the passwords in both text boxes match, the password will be changed, and a confirmation message will appear.



 **Tip:** The password is case-sensitive. This means capitalization of the letters is important!

 **Tip:** Make sure you remember your new password. You need this password to access the System Administration area. You might want to write it down and store it in a safe place.

5. Click **“Add”**.

Editing an Administrator

To edit an administrator, first highlight the name then click on **“Edit”**, or double click on the name. The administrator’s data will be copied to the entry boxes and you will be able to make your changes. When done, click on **“Save”** to keep the changes.

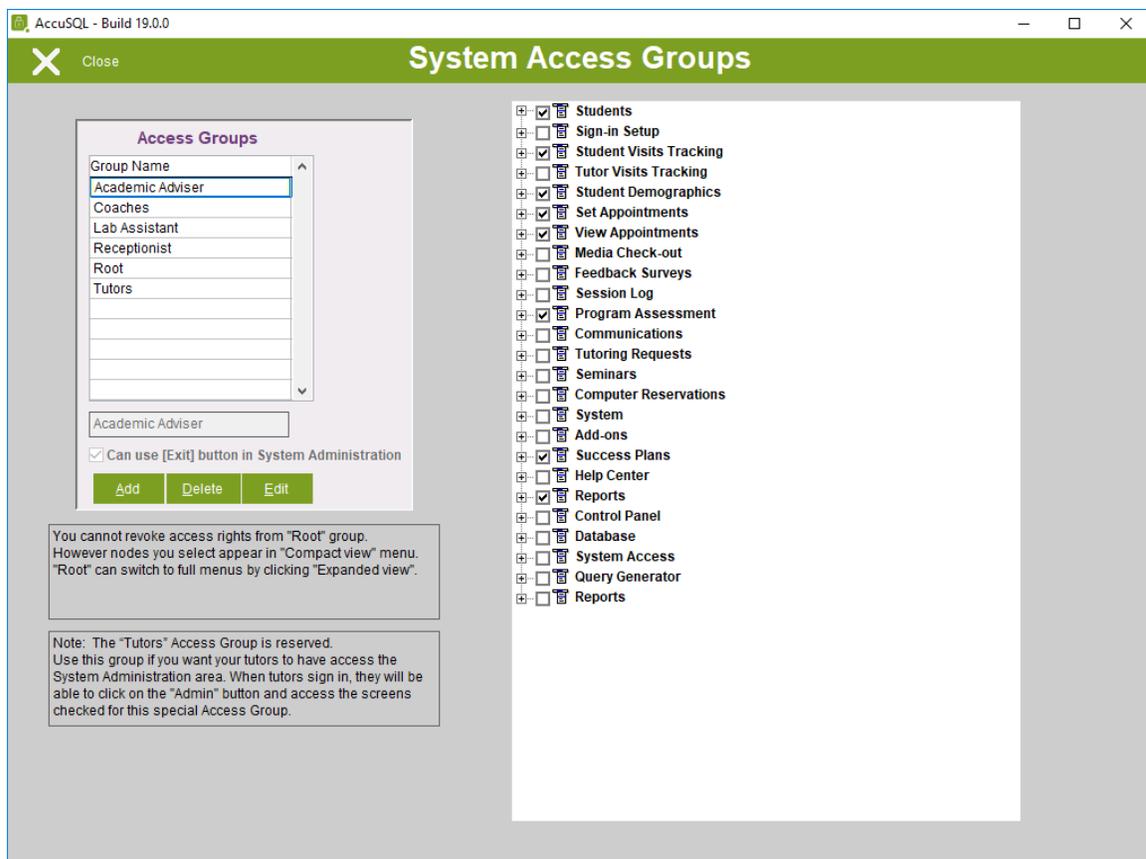
DELETING AN ADMINISTRATOR

To remove an administrator, select the name and click on the **“Delete”** button. A confirmation message will appear. If you click on **“Yes”**, the administrator will be removed.

SYSTEM ACCESS GROUPS

Purpose: Define access groups with customized system access levels.

Access: From System Administration, click on System Access>>Access Groups.



AccuSQL/AccuTrack allows multiple administrators to use the system. You can create groups of administrators and give each group access to selected screens. You can then add members to each group. For example, you might want lab assistants to sign students out, but you might not want them to access

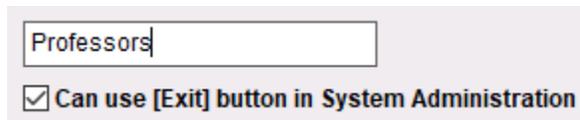
the database operations. This can be easily accomplished with AccuSQL/AccuTrack. First, you will need to set up a "Lab Assistant" access group and assign it access to the Sign Student Out screen.

Note: For the items that are not checked for an Access Group, the buttons will be grayed out in the System Administration Screen for users assigned to that group.

Adding a new Access Group

To create a new group, follow these steps:

1. Type the name of this group in the text box under the "Current Groups" list box. For example, type "Instructors" in the Group Name text box.



2. Indicate which screens you want this group to access by checking the boxes next to the screen's name.
3. Click on Save to save this new group.

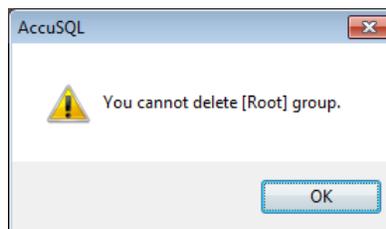
You can also indicate whether the members of a group can use the "Exit" button in the System Administration screen to exit AccuSQL/AccuTrack. If you check the "Can use [Exit] button in System Administration" checkbox, members of the group will have access to the Exit button.

Modifying Access Groups

To modify access rights for an existing group, first highlight the group's name in the list, and then click on the "Edit" button. You can also double click on the group's name to edit it. Make your changes and then click on the "Save" button.

Deleting an Access Group

To remove an access group completely, highlight it and then click on "Delete". AccuSQL/AccuTrack will check to make sure there are no administrators assigned to this group. If so, the group will be deleted, otherwise, you will see an error message.



 **Caution:** Make sure you leave at least one group with rights to access this screen and that you

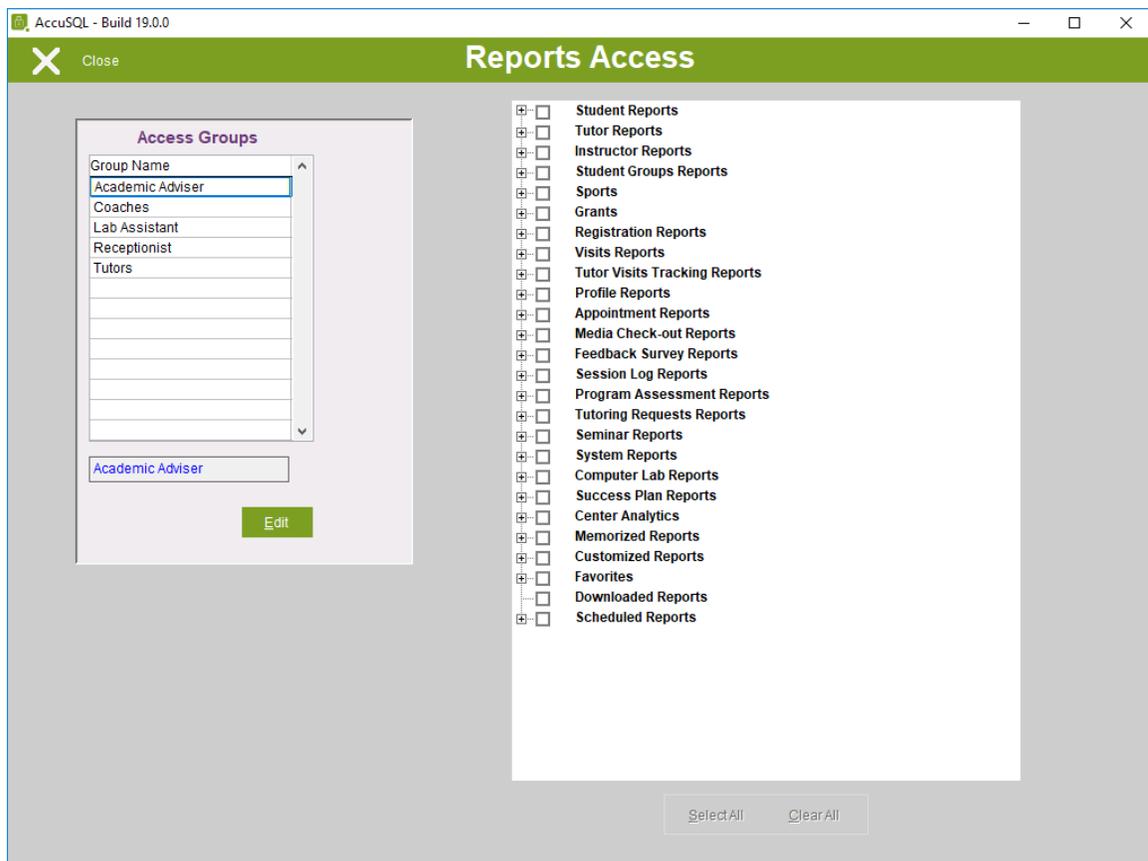
are a member of this group, otherwise you will lock yourself out of this screen or even the whole System Administration section.

Note: The “Tutors” access group controls which items are accessible to tutors when they sign in to the System Administration area via the “System Administration” button in the Tutors Control Pad. If this group is deleted, tutors will not have access to the System Administration screen via the Tutors Control Pad.

REPORTS ACCESS

Purpose: Determines which reports are available for the selected access group.

Access: From System Administration, click on System Access>>Reports Access.

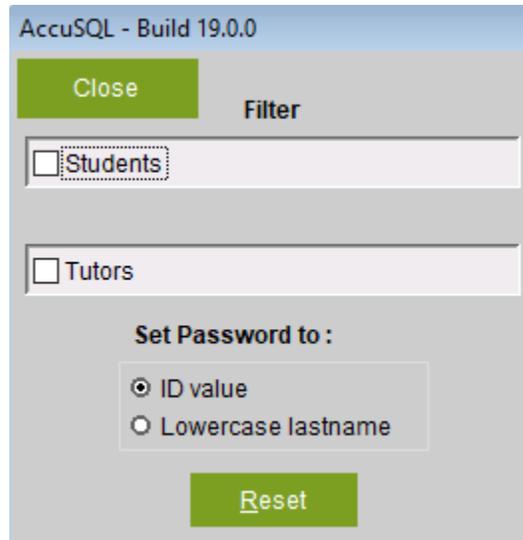


From this screen, you can decide which reports to give to a particular Access Group. The Access Group is defined in System Access >> Access Groups screen, then users are added to the group using the System Access >> System Administrators screen. Remember the Root and Tutors are special groups and should never be removed. When you assign reports to the tutor group, it will be used for all tutors you have created in the Tutor Setup >> Tutors screen. The Root (full admin) group automatically gets all the reports.

RESET STUDENT PASSWORDS

Purpose: Reset students’ or tutors’ password used to access the Web gateway module, to login into the Student Pad, or to login to the Computer Lab plugin if you require ID and password.

Access: From System Administration, click System Access>>Reset Student Passwords.



If you use the optional Web Gateway module for appointments scheduling, students and tutors need a password to access this module. If someone forgets his or her password, you can reset it using this screen. Start by selecting the person by using the “Students” and “Tutors” filter. Next indicate whether to reset the password to be the same as the person’s ID number, or to the lowercase version of the last name of this person. Click “Reset” to apply the change to the password. You should see a confirmation message similar to this:



ACCESS BY SIGN-IN STATIONS

Purpose: Identifies the computer used for a sign-in session.

Access: From System Administration, click on System Access>>Sign-In Stations.

Student Name	Student ID	Computer Name	NIC	Sign-In Time	Sign-Out Time	Source Type	Source Name
Thongpaen, Tawan	8888888	DESKTOP-70P58D3	4487FCC99EF3	09/11/2018 11:49 AM	09/11/2018 01:48 PM	Student	Tawan Thongpaen
Conner, Jenelle	7777777	DESKTOP-70P58D3	4487FCC99EF3	09/11/2018 11:50 AM	09/11/2018 01:48 PM	Student	Jenelle Conner
Crabtree, Sarah	5555555	DESKTOP-70P58D3	4487FCC99EF3	09/11/2018 11:50 AM	09/11/2018 05:50 PM	Student	Sarah Crabtree
Torres, Julia	6666666	DESKTOP-70P58D3	4487FCC99EF3	09/11/2018 11:55 AM	09/11/2018 01:49 PM	Student	Julia Torres
Rodriguez, Santiago	4444444	DESKTOP-70P58D3	4487FCC99EF3	09/11/2018 11:56 AM	09/11/2018 02:56 PM	Student	Santiago Rodriguez
Graff-Rapoza, Steffanie	3333333	DESKTOP-70P58D3	4487FCC99EF3	09/14/2018 12:42 PM	09/14/2018 01:45 PM	Student	Steffanie Graff-Rapoz
Graff-Rapoza, Steffanie	3333333	DESKTOP-70P58D3	4487FCC99EF3	09/14/2018 12:45 PM	09/14/2018 01:45 PM	Student	Steffanie Graff-Rapoz
Graff-Rapoza, Steffanie	3333333	DESKTOP-70P58D3	4487FCC99EF3	09/14/2018 12:50 PM	09/14/2018 02:17 PM	Student	Steffanie Graff-Rapoz
Rodriguez, Santiago	4444444	DESKTOP-70P58D3	4487FCC99EF3	09/26/2018 01:15 PM	09/26/2018 01:18 PM	Student	Santiago Rodriguez
Crabtree, Sarah	5555555	DESKTOP-70P58D3	4487FCC99EF3	09/26/2018 01:17 PM	09/26/2018 01:19 PM	Student	Sarah Crabtree
Rodriguez, Santiago	4444444	DESKTOP-70P58D3	4487FCC99EF3	09/26/2018 01:18 PM	09/26/2018 01:18 PM	Student	Santiago Rodriguez
Conner, Jenelle	7777777	DESKTOP-70P58D3	4487FCC99EF3	09/26/2018 01:18 PM	09/26/2018 04:17 PM	Student	Jenelle Conner
Crabtree, Sarah	5555555	DESKTOP-70P58D3	4487FCC99EF3	09/26/2018 01:19 PM	09/26/2018 01:48 PM	Student	Sarah Crabtree
Crabtree, Sarah	5555555	DESKTOP-70P58D3	4487FCC99EF3	09/26/2018 01:48 PM	09/26/2018 01:49 PM	Student	Sarah Crabtree
Graff-Rapoza, Steffanie	3333333	DESKTOP-ERGEV87	E840F210C075	09/26/2018 04:16 PM	09/26/2018 04:19 PM	Student	Steffanie Graff-Rapoz
Thongpaen, Tawan	8888888	DESKTOP-ERGEV87	E840F210C075	09/26/2018 04:18 PM	09/26/2018 05:18 PM	Student	Tawan Thongpaen
Blodgett, Chadd	9999999	DESKTOP-ERGEV87	E840F210C075	09/26/2018 04:18 PM	09/26/2018 05:18 PM	Student	Chadd Blodgett
Graff-Rapoza, Steffanie	3333333	DESKTOP-ERGEV87	E840F210C075	09/26/2018 04:42 PM	09/26/2018 04:42 PM	Student	Steffanie Graff-Rapoz
Graff-Rapoza, Steffanie	3333333	DESKTOP-70P58D3	4487FCC99EF3	09/27/2018 05:23 PM	09/27/2018 08:23 PM	Student	Steffanie Graff-Rapoz
Graff-Rapoza, Steffanie	3333333	DESKTOP-70P58D3	4487FCC99EF3	09/28/2018 01:55 PM	09/28/2018 04:56 PM	Student	Steffanie Graff-Rapoz
Graff-Rapoza, Steffanie	3333333	DESKTOP-70P58D3	4487FCC99EF3	10/02/2018 05:36 PM	10/02/2018 08:36 PM	Student	Steffanie Graff-Rapoz
Rodriguez, Santiago	4444444	DESKTOP-70P58D3	4487FCC99EF3	10/02/2018 05:36 PM	10/02/2018 08:37 PM	Student	Santiago Rodriguez
Graff-Rapoza, Steffanie	3333333	DESKTOP-70P58D3	4487FCC99EF3	10/04/2018 05:35 PM	10/04/2018 08:36 PM	Student	Steffanie Graff-Rapoz
Graff-Rapoza, Steffanie	3333333	DESKTOP-70P58D3	4487FCC99EF3	10/25/2018 12:02 PM	10/25/2018 12:03 PM	Student	Steffanie Graff-Rapoz
Graff-Rapoza, Steffanie	3333333	DESKTOP-70P58D3	4487FCC99EF3	11/07/2018 04:35 PM	11/07/2018 04:35 PM	Student	Steffanie Graff-Rapoz
Graff-Rapoza, Steffanie	3333333	LAPTOP-KMGF9Q24	E4029BC515B0	11/09/2018 09:42 AM	11/09/2018 09:49 AM	Student	Steffanie Graff-Rapoz
Graff-Rapoza, Steffanie	3333333	LAPTOP-KMGF9Q24	E4029BC515B0	11/09/2018 09:52 AM	11/09/2018 09:52 AM	Student	Steffanie Graff-Rapoz
Rodriguez, Santiago	4444444	DESKTOP-70P58D3	4487FCC99EF3	11/14/2018 11:29 AM	11/14/2018 12:09 PM	Student	Santiago Rodriguez
Graff-Rapoza, Steffanie	3333333	DESKTOP-70P58D3	4487FCC99EF3	11/14/2018 11:30 AM	11/14/2018 12:09 PM	Student	Steffanie Graff-Rapoz
Conner, Jenelle	7777777	DESKTOP-70P58D3	4487FCC99EF3	11/16/2018 02:39 PM	11/16/2018 03:40 PM	Student	Jenelle Conner
Thongpaen, Tawan	8888888	DESKTOP-70P58D3	4487FCC99EF3	11/16/2018 02:40 PM	11/20/2018 08:54 AM	Student	Tawan Thongpaen

Use this screen if you need to identify who used a computer at a certain time. This is mostly useful if you are using the AccuSQL/AccuTrack Computer Lab module or several sign-in stations.

The *SuperTable* shows the student’s name, ID, computer’s name, Network ID Card, Sign-in time and Sign-out time. Since this is a *SuperTable* control, you can use its built-in data sorting and searching capabilities to find a specific record. You can also use the time filter under the table to zoom in on a specific sign-in time.

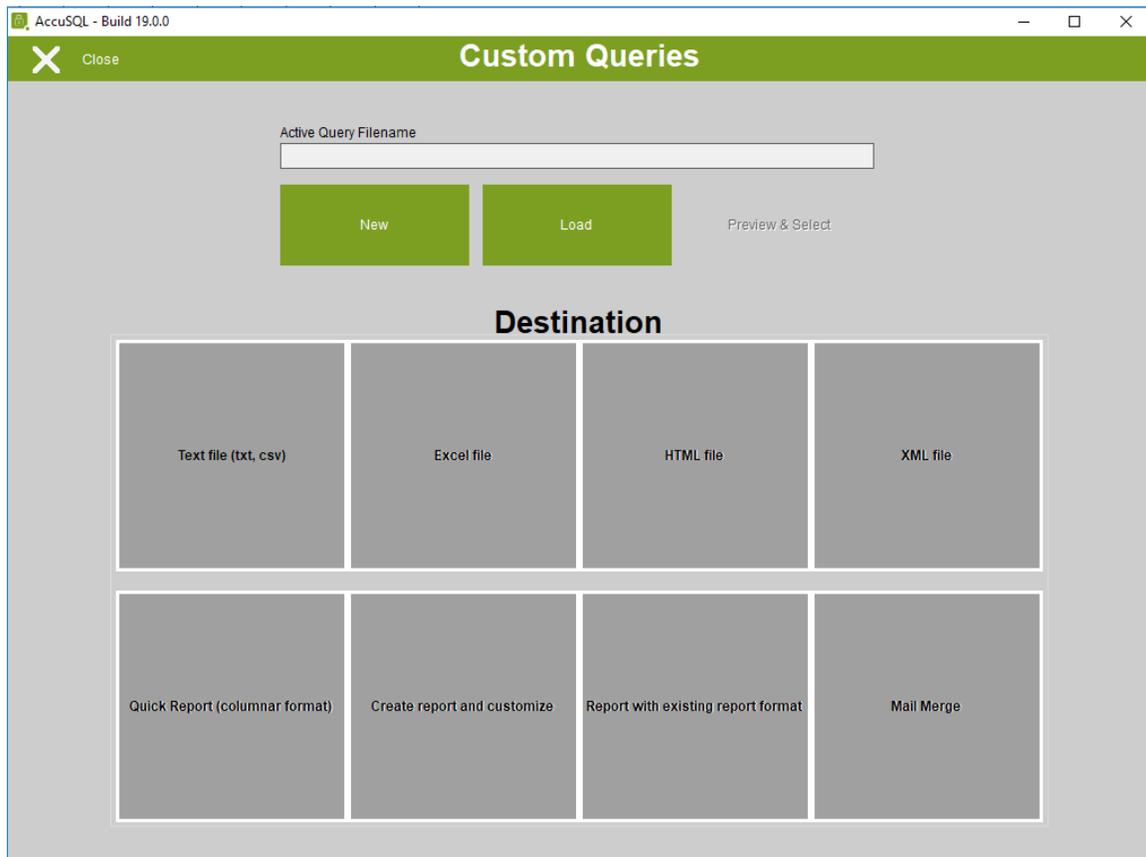
CUSTOM QUERIES

Purpose: Build your own custom reports.

Access: From System Administration, select Custom Queries.

While AccuSQL/AccuTrack has plenty of reports available from the Reports menu, you are not limited to them only. Using Query Generator, you can build your own custom reports and pull data from multiple different tables. You also have the ability to filter your results in several different ways, sort the report output, save and load your custom reports, and also display them in several different formats.

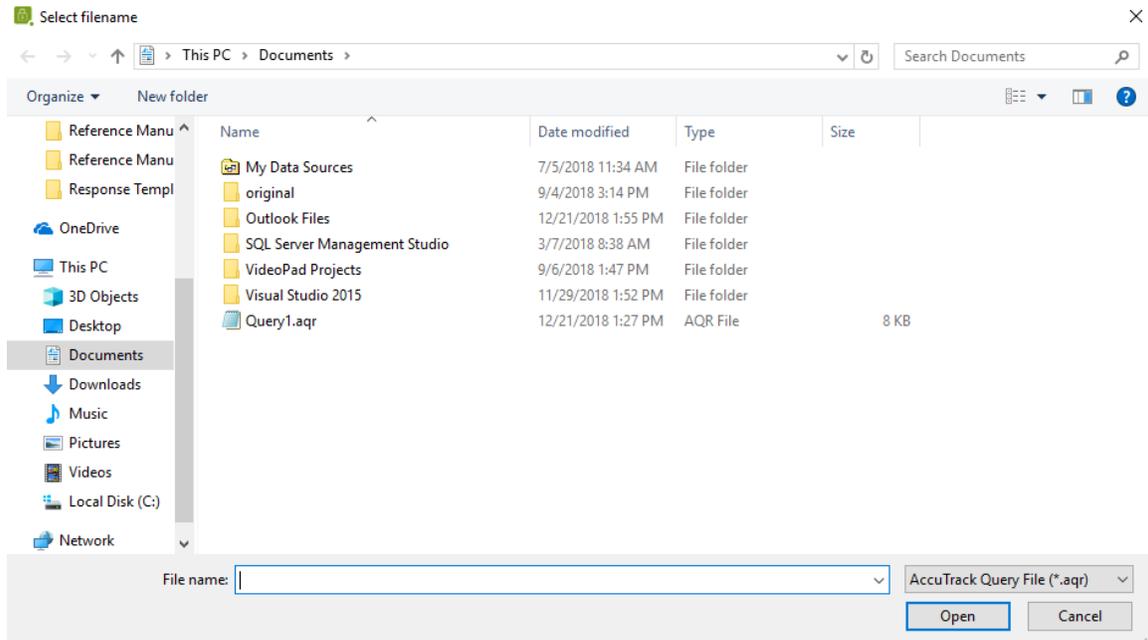
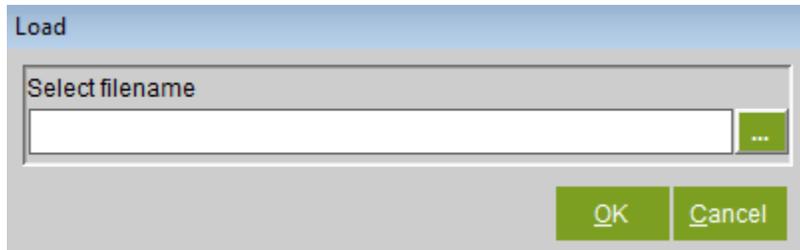
When you click Query Generator, you will be presented with the Custom Queries screen. In this screen, you can either load a query you have previously saved, or you can create a new custom query.



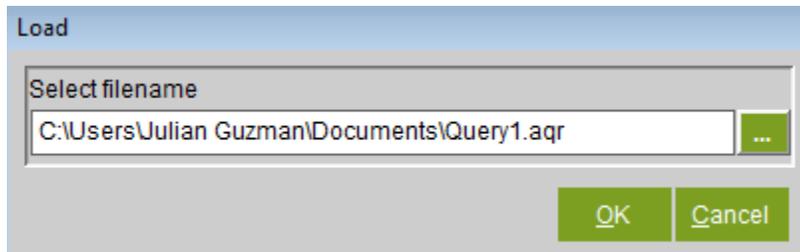
LOADING A CUSTOM QUERY

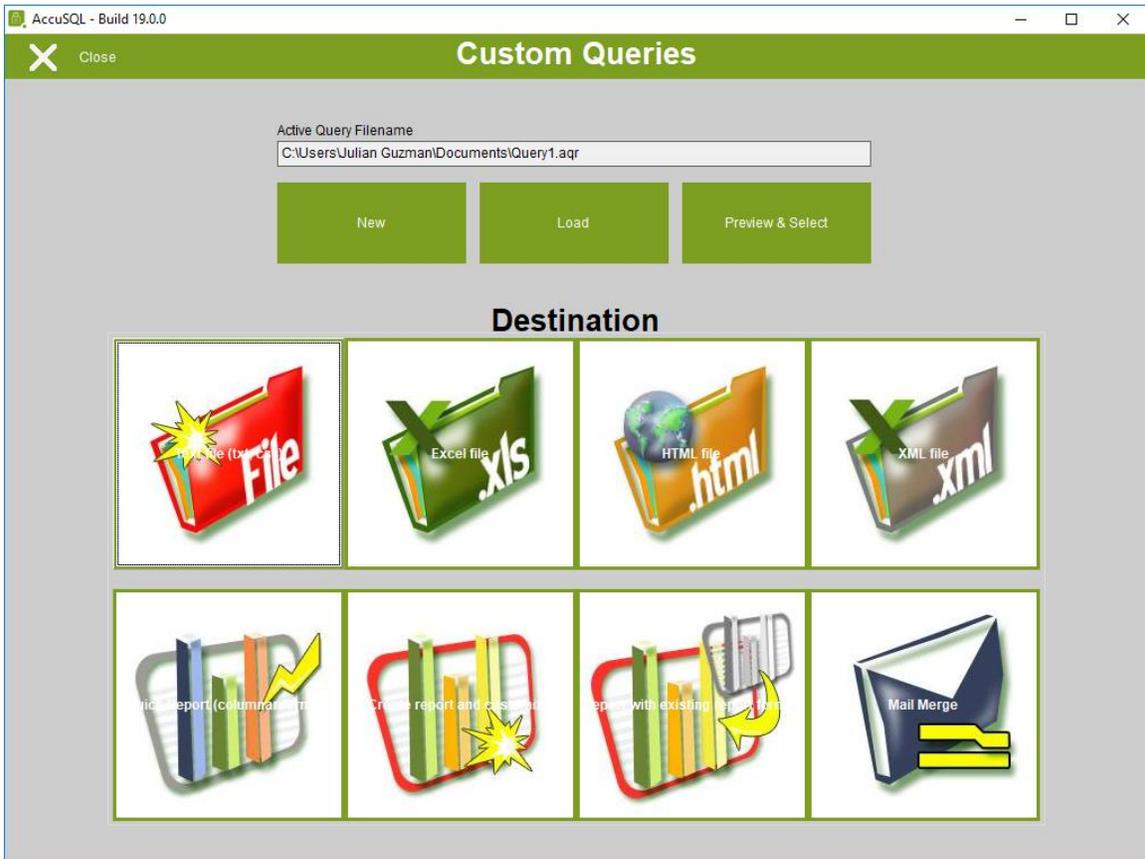
To load a previously saved query, click the Load button.

In the Load pop-up box, click the button with the three ellipses (...) to open the Select Filename menu. In this menu you need to navigate to where your report was saved when you created it. Reports have an .aqr file extension:



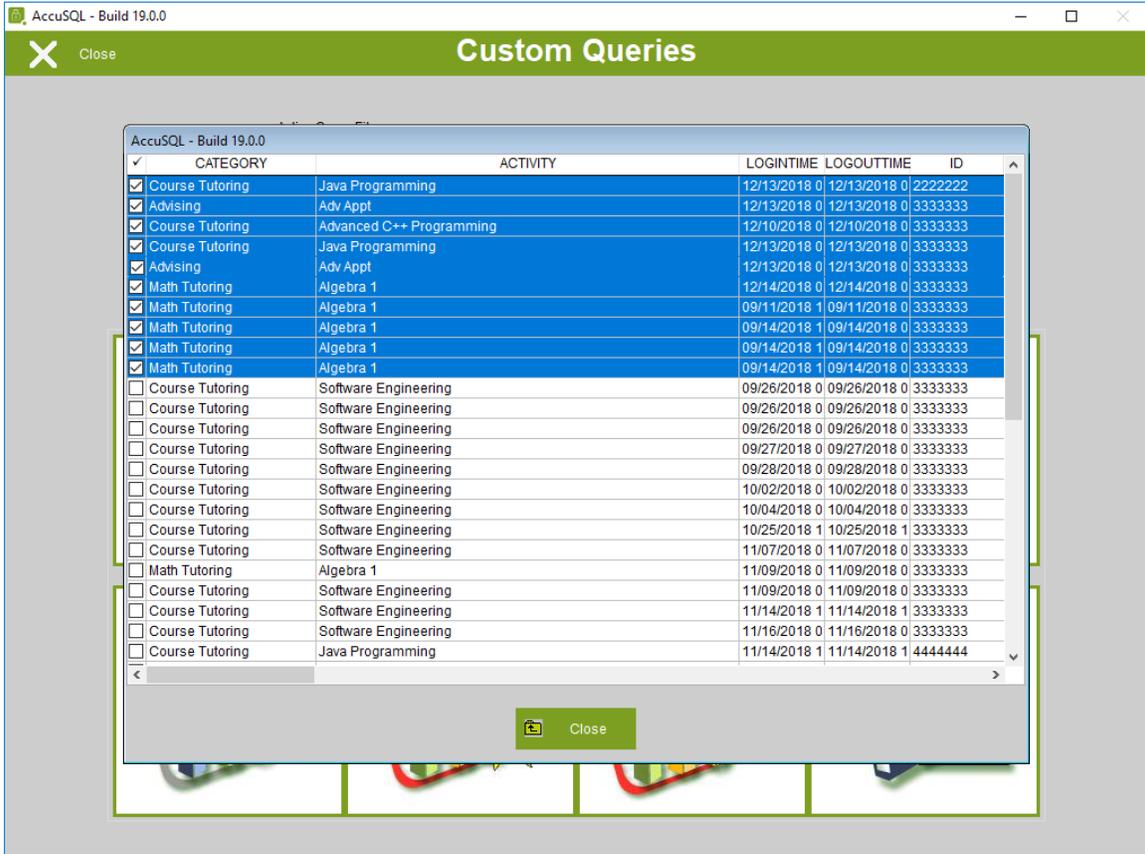
Click the report you want to load and then press the Open button. The Load pop-up box will open with the report selected. Press OK to load the report.



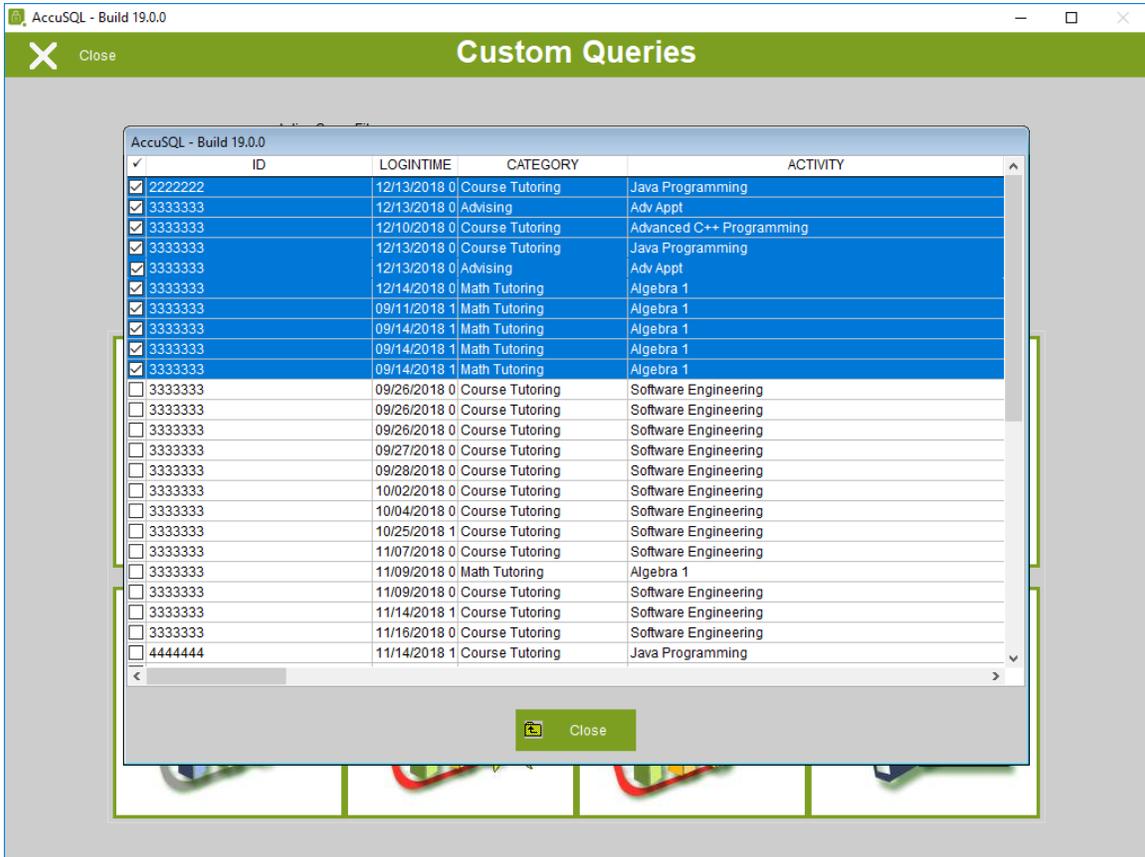


Once the report is loaded, you can select the format for the report output. If you press the Preview & Select button you can get a preview of the data contained in the report. You can click each record you want included in the report, or you can press the + sign on your numeric keypad to select all records.

Note: If you do not press the Preview & Select button, all records will be selected automatically.



You can change the column order of the preview display by dragging the column headers in the Preview screen.

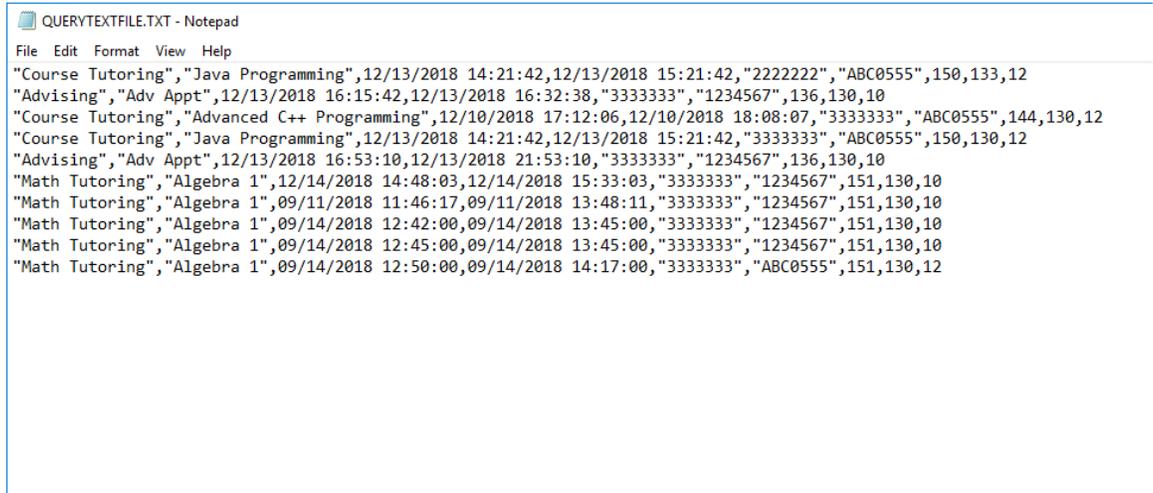


CUSTOM REPORT OUTPUT OPTIONS

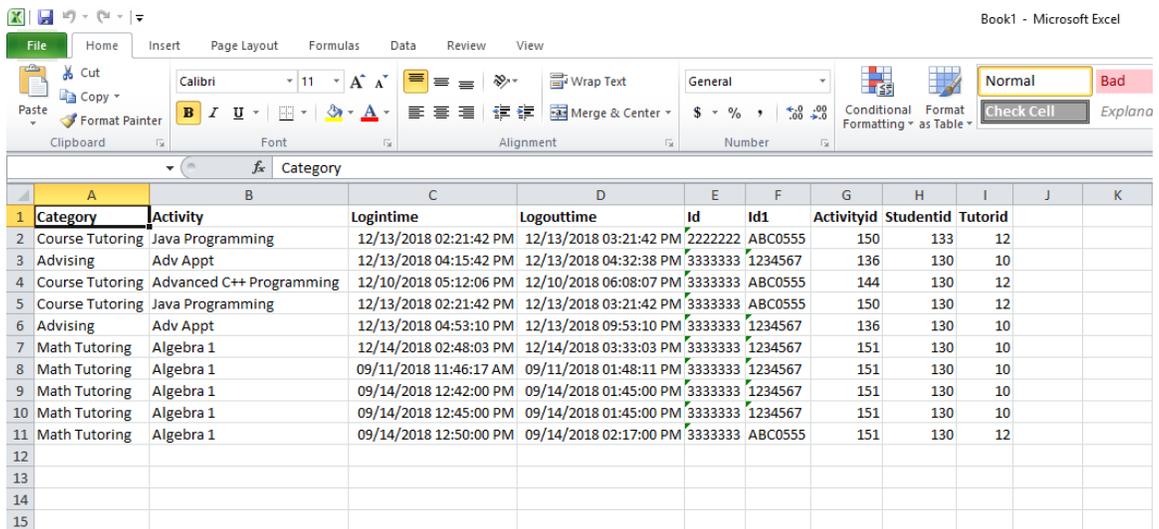
After you have loaded (or created) a report, you can output the data in several formats, as follows.



- Text File:** Select this button to save the file as a comma separated (csv) file. This is a good format if you want to later import the data into another program. When you press Text file, you will be presented with the Save as pop-up box. Press the three ellipses button (...) to select a save location, enter the name for the file, then press the Open button and then OK in the Save as box.



- Excel file:** Press this button to open the results in an Excel directly. You can then view and/or save the file.



- HTML file:** Press this button to save the results as a Web page. When you press HTML file, you will be presented with the Save as pop-up box. Press the three ellipses button (...) to select a save location, enter the name for the file, then press the Open button and then OK in the Save as box.

Category	Activity	Logintime	Logouttime	Id	Id1	Activityid	Studentid	Tutorid
Course Tutoring	Java Programming	12/13/2018 02:21 PM	12/13/2018 03:21 PM	2222222	ABC0555	150	133	12
Advising	Adv Appt	12/13/2018 04:15 PM	12/13/2018 04:32 PM	3333333	1234567	136	130	10
Course Tutoring	Advanced C++ Programming	12/10/2018 05:12 PM	12/10/2018 06:08 PM	3333333	ABC0555	144	130	12
Course Tutoring	Java Programming	12/13/2018 02:21 PM	12/13/2018 03:21 PM	3333333	ABC0555	150	130	12
Advising	Adv Appt	12/13/2018 04:53 PM	12/13/2018 09:53 PM	3333333	1234567	136	130	10
Math Tutoring	Algebra 1	12/14/2018 02:48 PM	12/14/2018 03:33 PM	3333333	1234567	151	130	10
Math Tutoring	Algebra 1	09/11/2018 11:46 AM	09/11/2018 01:48 PM	3333333	1234567	151	130	10
Math Tutoring	Algebra 1	09/14/2018 12:42 PM	09/14/2018 01:45 PM	3333333	1234567	151	130	10
Math Tutoring	Algebra 1	09/14/2018 12:45 PM	09/14/2018 01:45 PM	3333333	1234567	151	130	10
Math Tutoring	Algebra 1	09/14/2018 12:50 PM	09/14/2018 02:17 PM	3333333	ABC0555	151	130	12

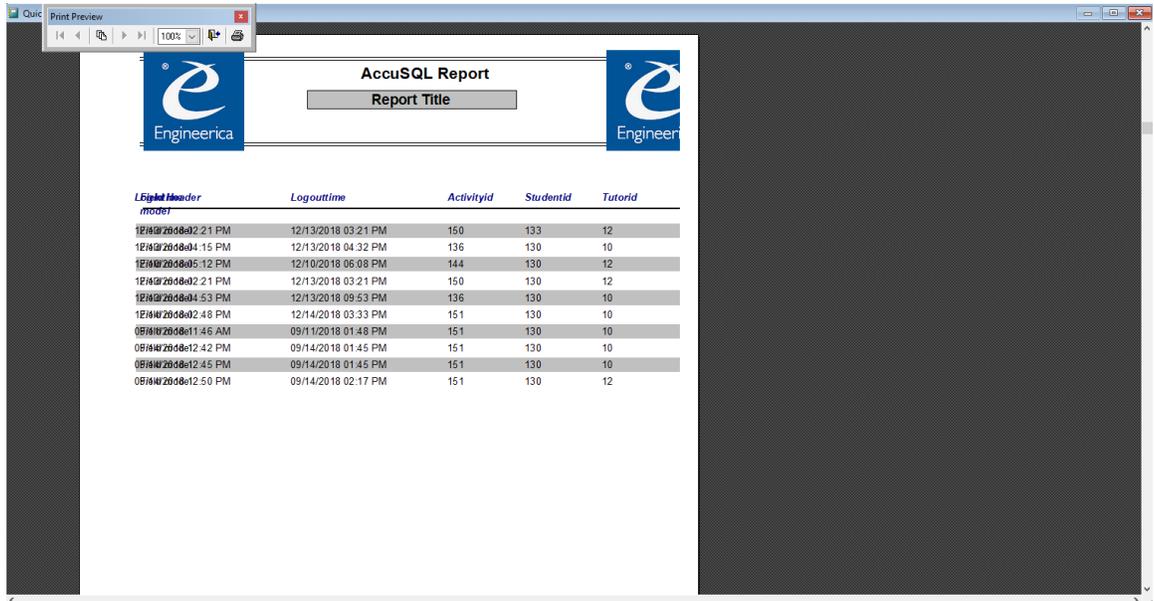
- XML file:** Press this button to save the results in a XML file. XML files are good for storing configuration data and transferring data, typically via Simple Object Access Protocol (SOAP). When you press XML file, you will be presented with the Save as pop-up box. Press the three ellipses button (...) to select a save location, enter the name for the file, then press the Open button and then OK in the Save as box.

```

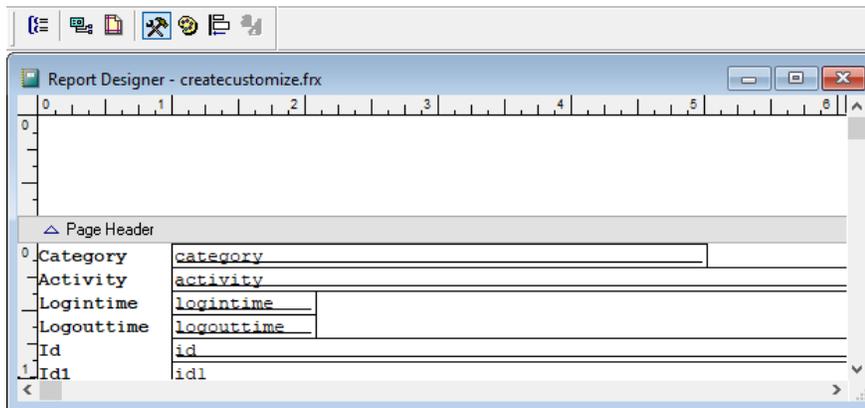
XMLFILE.XML - Notepad
File Edit Format View Help
<?xml version = "1.0" encoding="Windows-1252" standalone="yes"?>
<VFPData>
  <xsd:schema id="VFPData" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:msdata="urn:schemas-microsoft-com:xml-msdata">
    <xsd:element name="VFPData" msdata:IsDataSet="true">
      <xsd:complexType>
        <xsd:choice maxOccurs="unbounded">
          <xsd:element name="crsquery" minOccurs="0" maxOccurs="unbounded">
            <xsd:complexType>
              <xsd:sequence>
                <xsd:element name="category">
                  <xsd:simpleType>
                    <xsd:restriction base="xsd:string">
                      <xsd:maxLength value="30"/>
                    </xsd:restriction>
                  </xsd:simpleType>
                </xsd:element>
                <xsd:element name="activity" minOccurs="0">
                  <xsd:simpleType>
                    <xsd:restriction base="xsd:string">
                      <xsd:maxLength value="75"/>
                    </xsd:restriction>
                  </xsd:simpleType>
                </xsd:element>
                <xsd:element name="logintime" type="xsd:dateTime" minOccurs="0"/>
                <xsd:element name="logouttime" type="xsd:dateTime" minOccurs="0"/>
                <xsd:element name="id">
                  <xsd:simpleType>
                    <xsd:restriction base="xsd:string">
                      <xsd:maxLength value="40"/>
                    </xsd:restriction>
                  </xsd:simpleType>
                </xsd:element>
                <xsd:element name="id1">
                  <xsd:simpleType>
                    <xsd:restriction base="xsd:string">
                      <xsd:maxLength value="40"/>
                    </xsd:restriction>
                  </xsd:simpleType>
                </xsd:element>
                <xsd:element name="activityid" type="xsd:int"/>
                <xsd:element name="studentid" type="xsd:int" minOccurs="0"/>
                <xsd:element name="tutorid" type="xsd:int" minOccurs="0"/>
              </xsd:sequence>
            </xsd:complexType>
          </xsd:element>
        </xsd:choice>
        <xsd:anyAttribute namespace="http://www.w3.org/XML/1998/namespace" processContents="lax"/>
      </xsd:complexType>
    </xsd:element>
  </xsd:schema>
  <crsquery>
    <category>Course Tutoring</category>
    <activity>Java Programming</activity>
    <logintime>2018-12-13T14:21:42</logintime>
    <logouttime>2018-12-13T15:21:42</logouttime>
    <id>222222</id>
    <id1>ABC0555</id1>
  </crsquery>

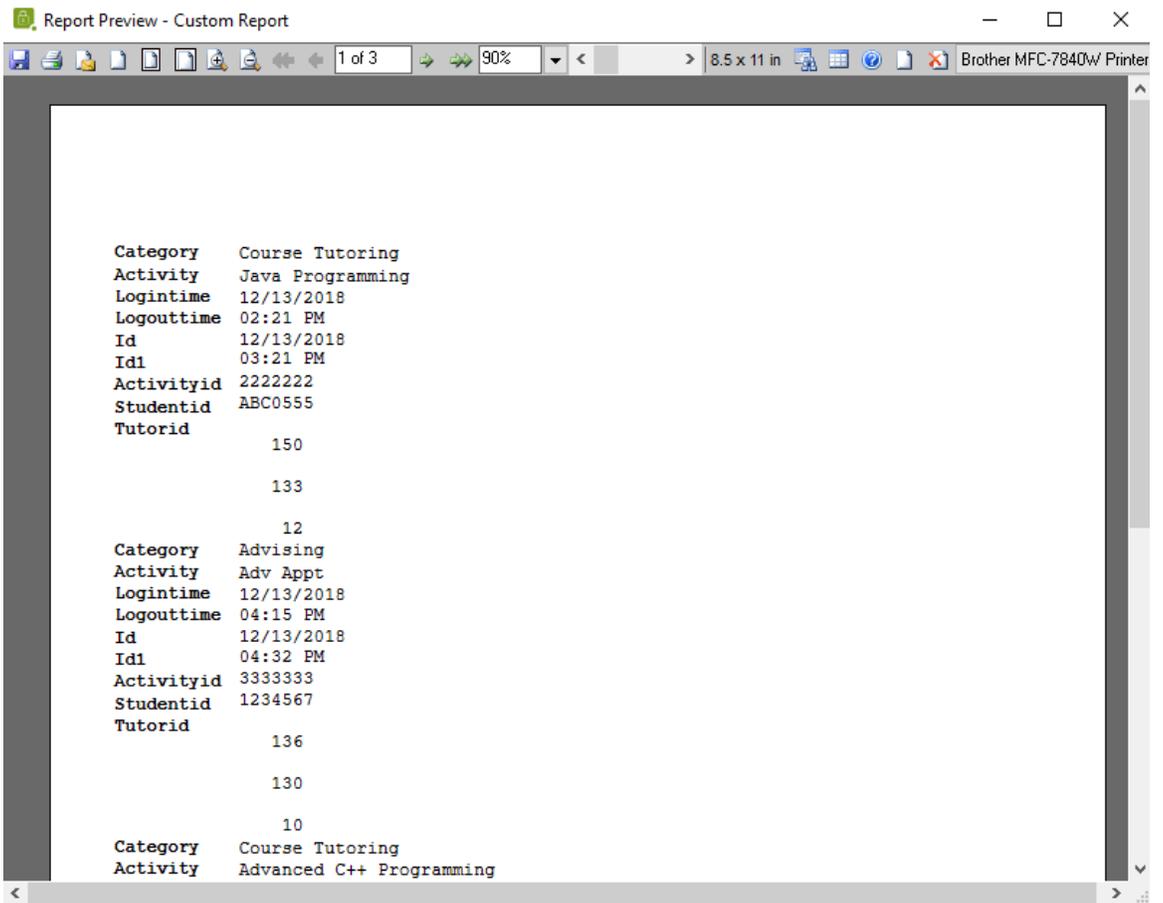
```

- **Quick Report:** Press this button to display the report in the built in report viewer.

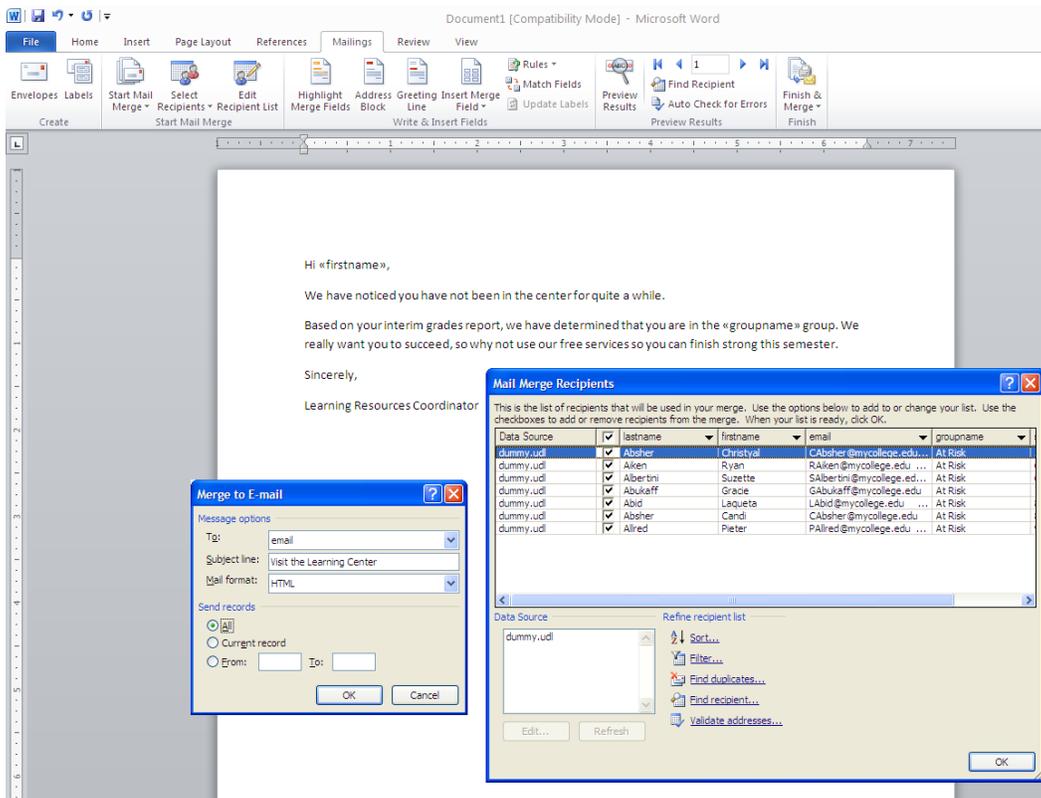


- **Create report and customize:** Press the button if you want to build your own report display using the built-in report editor. You can change the look of the report, add your own properties to it, etc. using this tool. When you press Create report and customize, you will be presented with the Save as pop-up box. Press the three ellipses button (...) to select a save location, enter the name for the file, then press the Open button and then OK in the Save as box. The report will open in the report editor, where you can customize the report and save it.



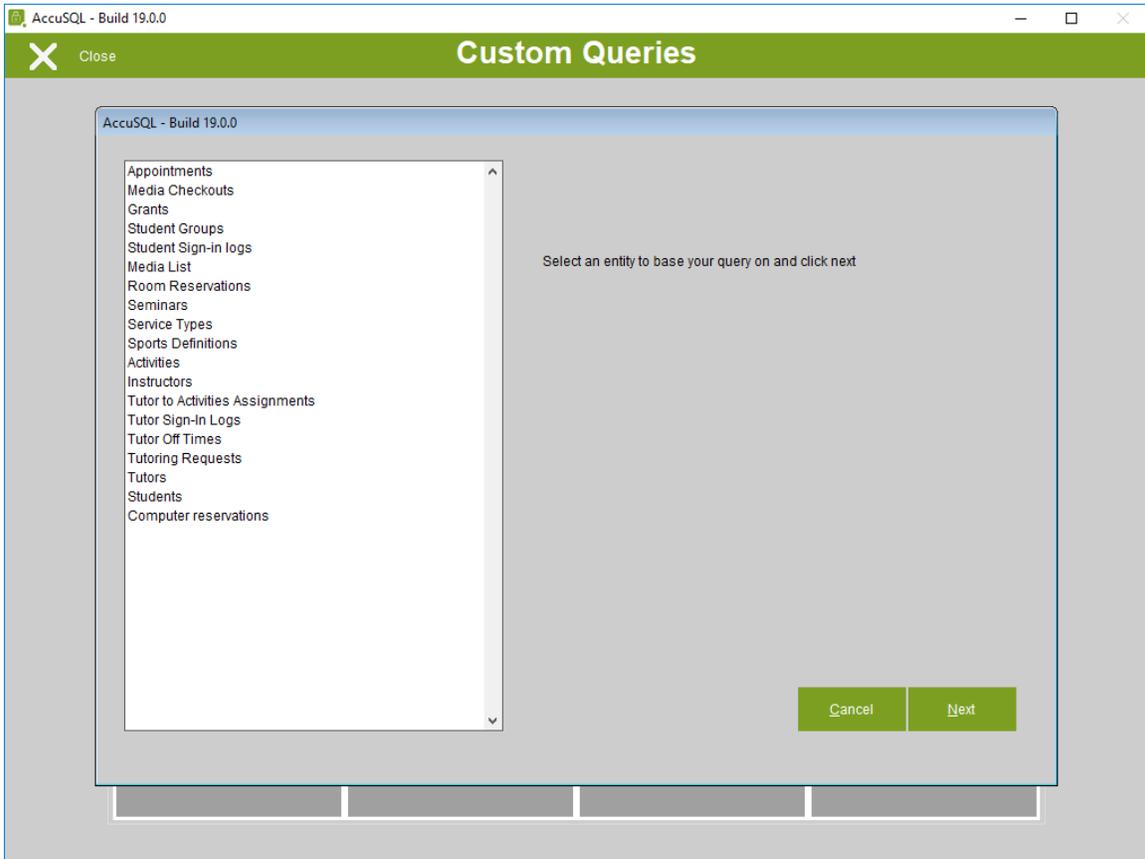


Mail Merge: Press this button if you would like to create Mail Merge from the data in MS Word. Please consult your Word documentation for information on how mail merges work. The data in the report will be available to you as merge fields in your Word document. **Tip:** If you want to do an emailing for your records, make sure to include the tutor, student, and/or instructor email in your field list when you define the query. If you intend to do a letter based mailing, make sure you include the tutor, student and/or instructor address information in your field list. When you press Mail Merge, you will be presented with the select existing mail merge template (if any box). Press the three ellipses button (...) to navigate to an existing Word document you have saved for the mailing. If you leave the box blank and press OK, you will be able to create a new mail merge document.



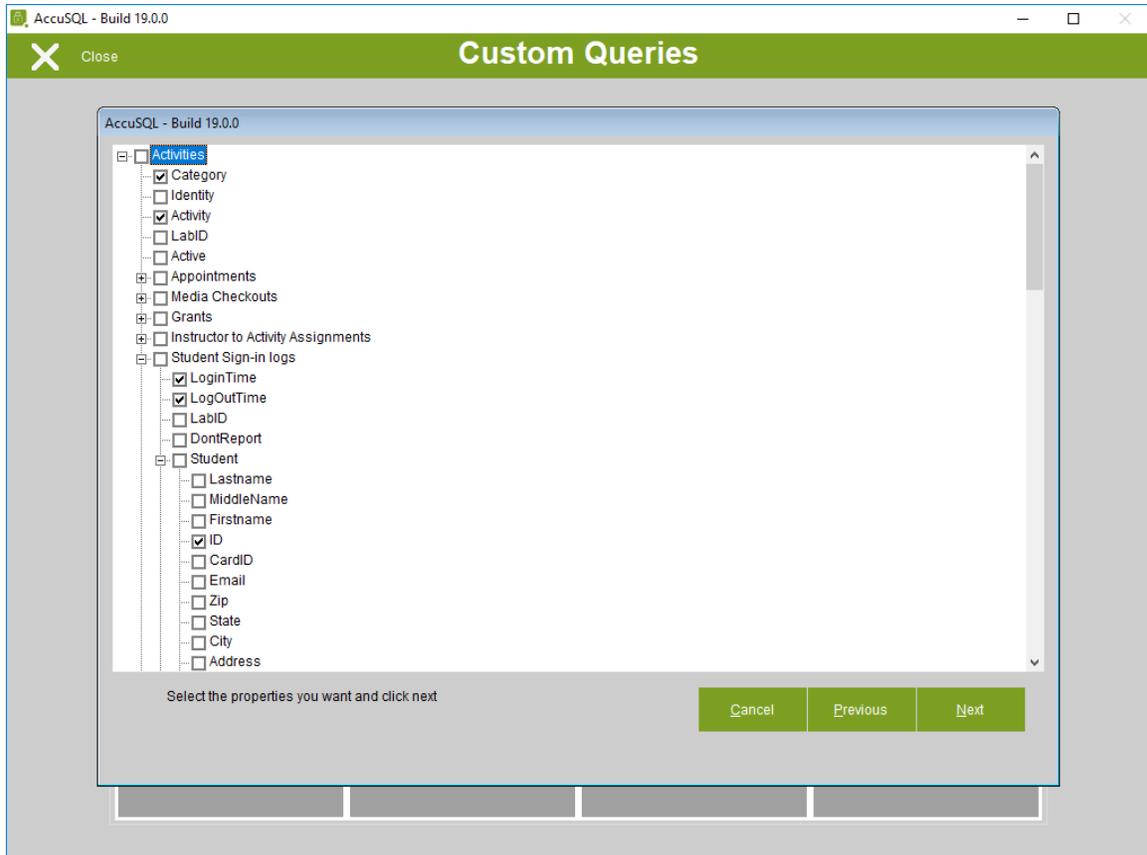
CREATING A NEW CUSTOM QUERY

When you press the New button in the Custom Queries screen you will be presented with the Define Query menu. In this menu, you select the base entity you will use for the query you will be building. For example, if you wanted to build a report based primarily on student data, you would select the Students base entity. If you wanted to base a report on appointments, you would select the Appointments entity.



Click Next and you will be presented with the Define Query screen. In this screen you can select the fields you want to add to the report from different tables. Click the + sign next to the base entity to see the fields available from the various table. Check the boxes next to the fields you want to include in the report. Tip: If you click or unclick the box next to a top-level entity, you will select or deselect all fields for that entity.

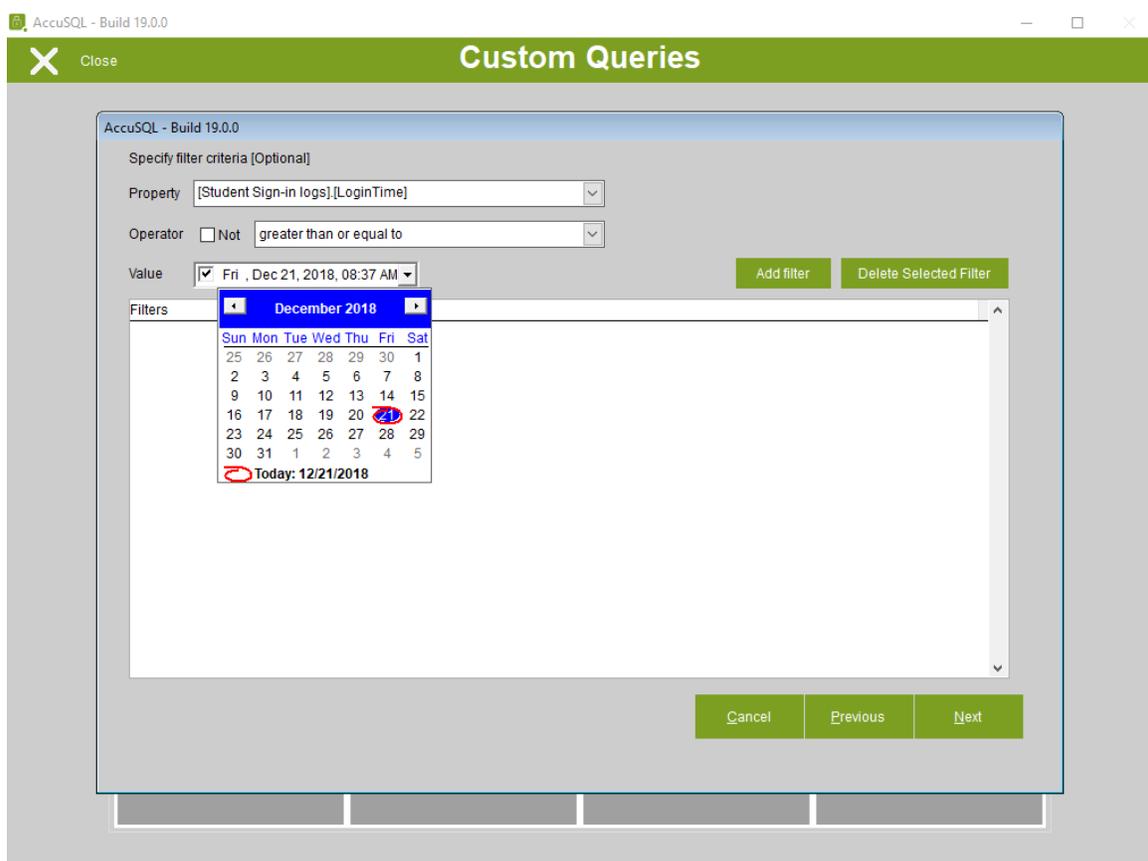
Note: You can click the Previous button to go back to the previous screen. This is a new feature for 2019.



After you select all the fields you want to include in the report, press the Next button. You will be presented with the Specify filter criteria screen. In this screen, you can use the Property drop-down to select the field you want to filter on, the Operator drop-down to select the filter type, and then enter the filter value in the Value field. After you have entered the filter information, press the Add Filter button. You can create as many filters as you want for the report using this method. Of course, if you filter too much, you may not get any data back that meets all the criteria!

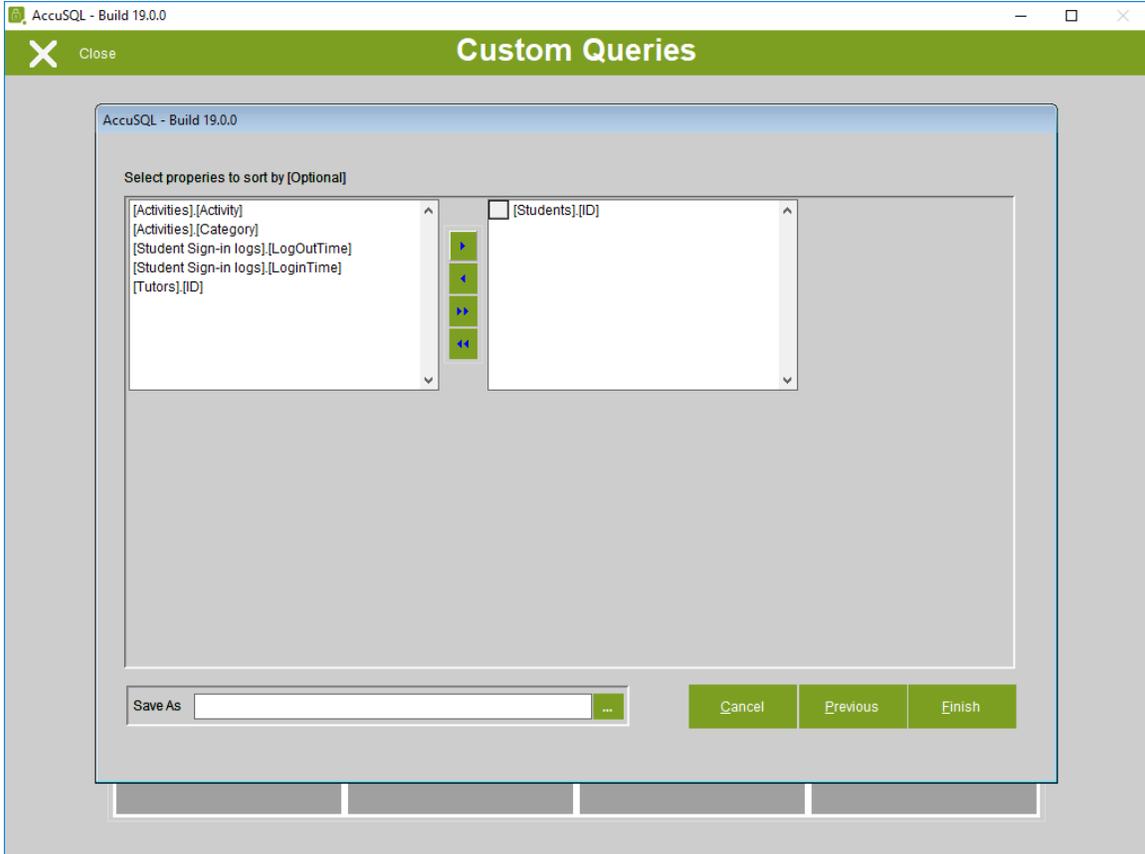
Note: You can click the Previous button to go back to the previous screen. This is a new feature for 2019.

Note: You can also delete filters now after creating them using the Delete Selected Filter button. This is a new feature for 2019.



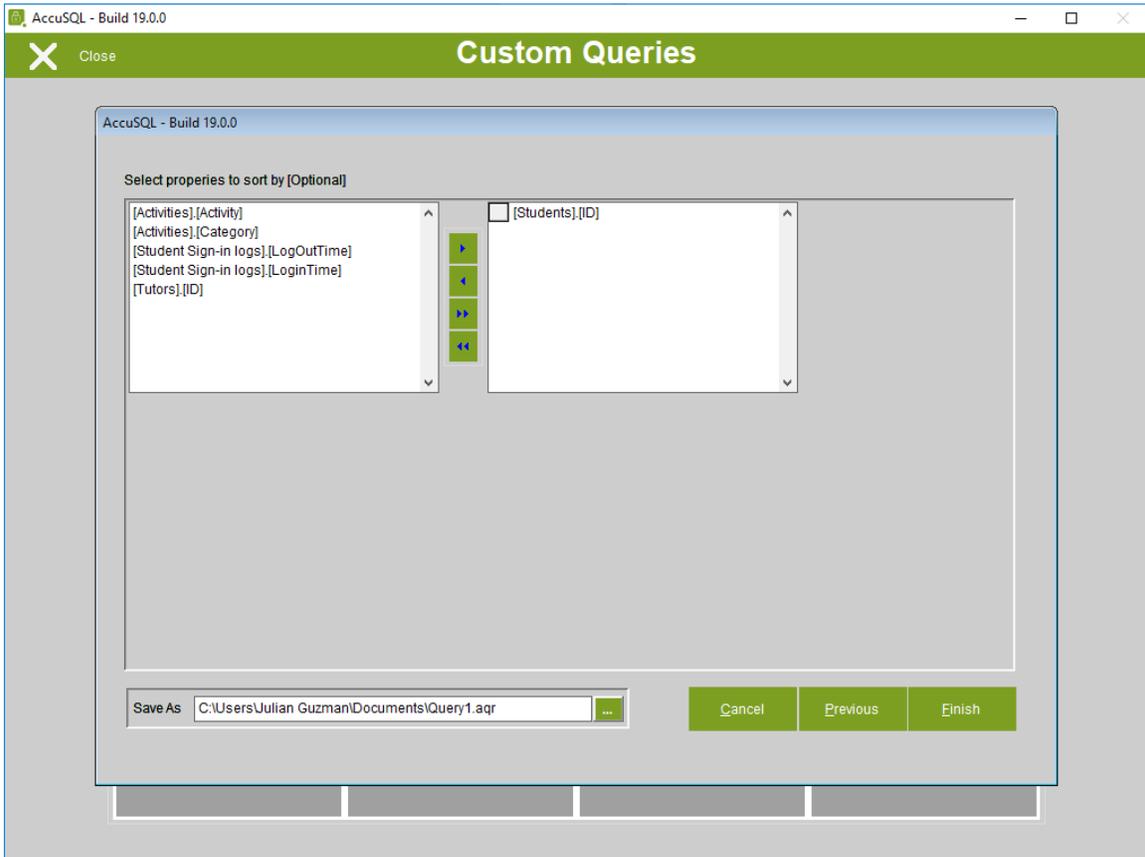
Once you have set your filters (if any), press the Next button. You will be presented with the select properties to sort by screen. In this screen, you can move fields from the left side of the screen to the right side to determine the sort order the report. You can sort and sub sort any of the fields available in the report. The primary sort field will be the first item on the right side, then your sub-sorts will be used in the order you set them.

Note: You can click the Previous button to go back to the previous screen. This is a new feature for 2019.



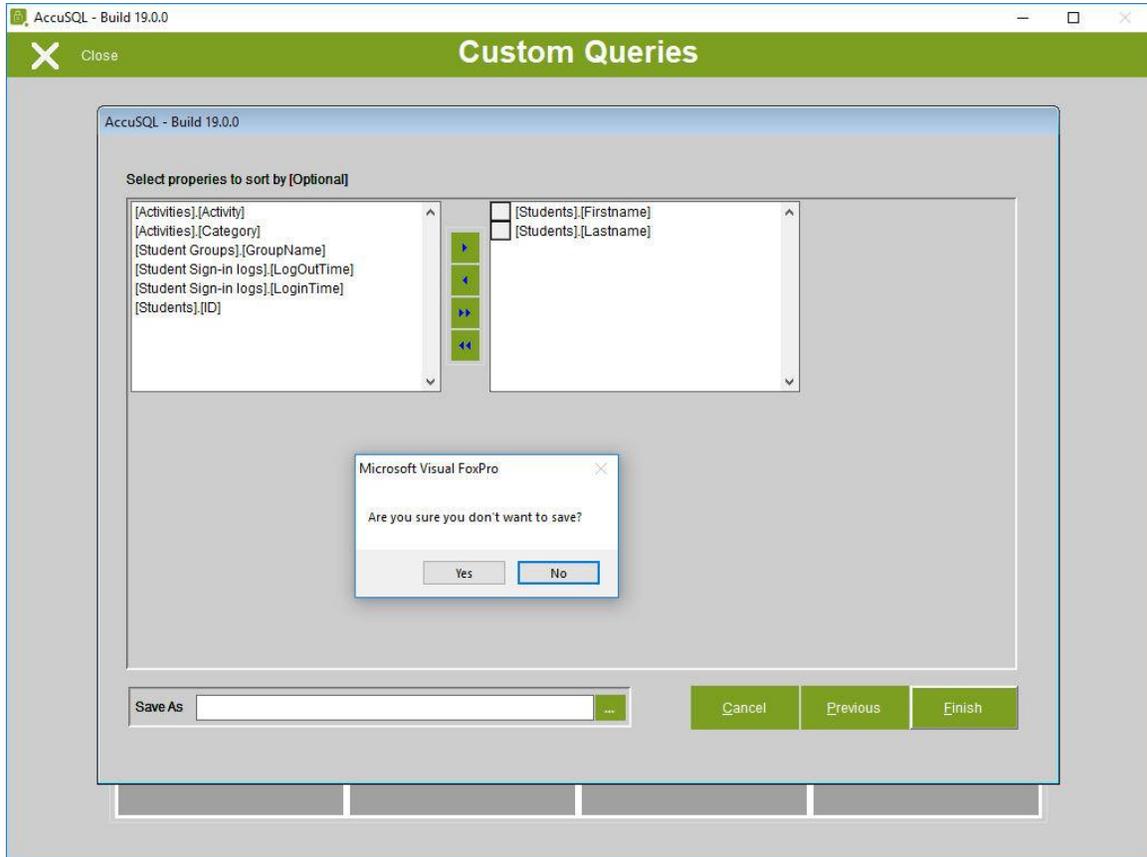
Also in this screen, you will be able to save the report. Press the ellipses button (...) next to the Save As field to navigate to the folder where you want to save the report. Enter the report file name and then press Open.

Note: You can click the Previous button to go back to the previous screen. This is a new feature for 2019.



After you have set the sort order (if any) and saved the report (if so desired) press the Finish button to load the report viewer options. You can then view and/or save the report output in whichever format you desire. Please see Custom Report Output Options earlier in this document for details.

Note: If you click next without saving, you will be prompted to go back and save the query or continue to the next screen.



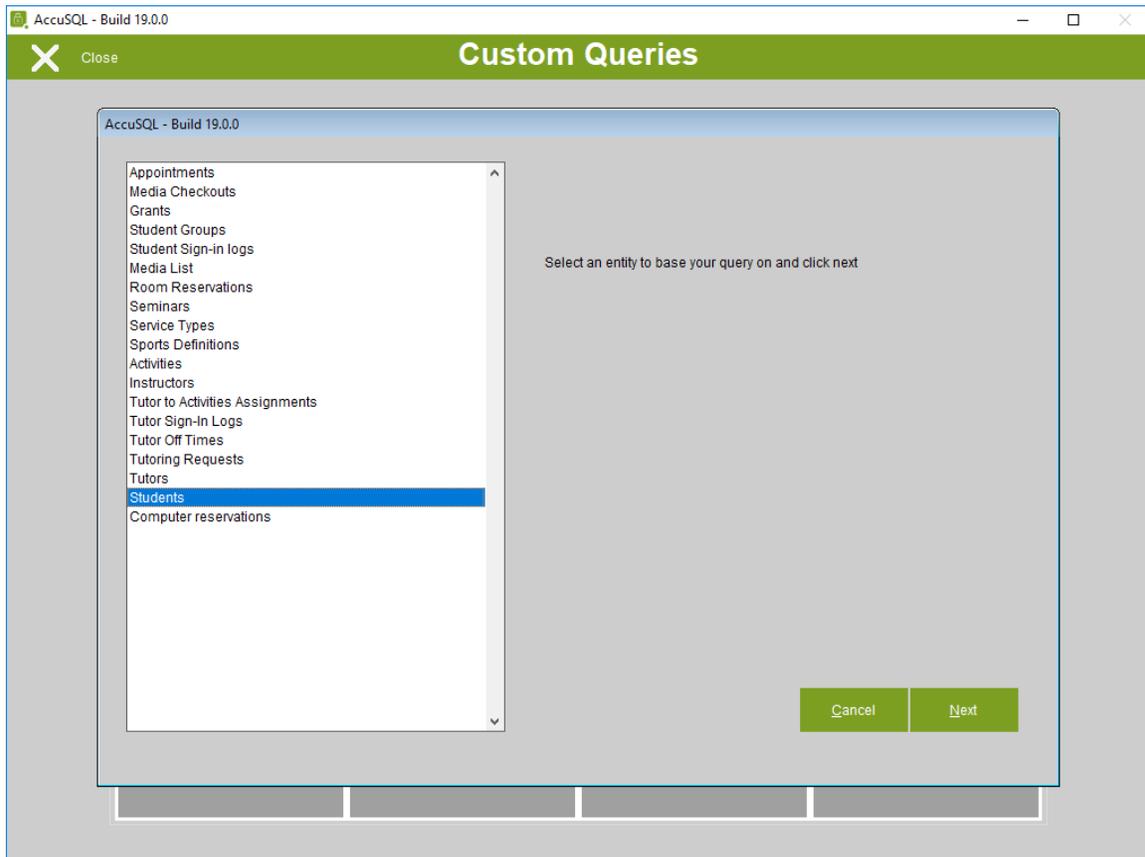
CUSTOM QUERY EXAMPLE

In this example, we have a student group called At Risk with several students in the group. We want to get a report showing the student last name, first name and email, and the sign ins and sign outs to AccuSQL/AccuTrack with the Category and Activity, but only between the dates of 03/01/2013 and 09/21/2013. Further, we want to get the students major, which is stored in Profile field 1 of the student record. Finally we want the first name and last name of the tutor they selected when they signed in. When analyzing this query, we would be pulling data from six tables:

- Students
- Student Groups
- Activities
- Sign In/Sign out log

- Profiles
- Tutors

Since the query will be based on the student sign ins and sign outs, the base entity for the report will be Students.



After we click Next, In the Define Query Screen, we would pick all the fields we want. For this query, that would include the following:

Students – Lastname

Students – Firstname

Students – Email

Students – P1

Student Groups – GroupName

Student Sign-in Logs – LoginTime

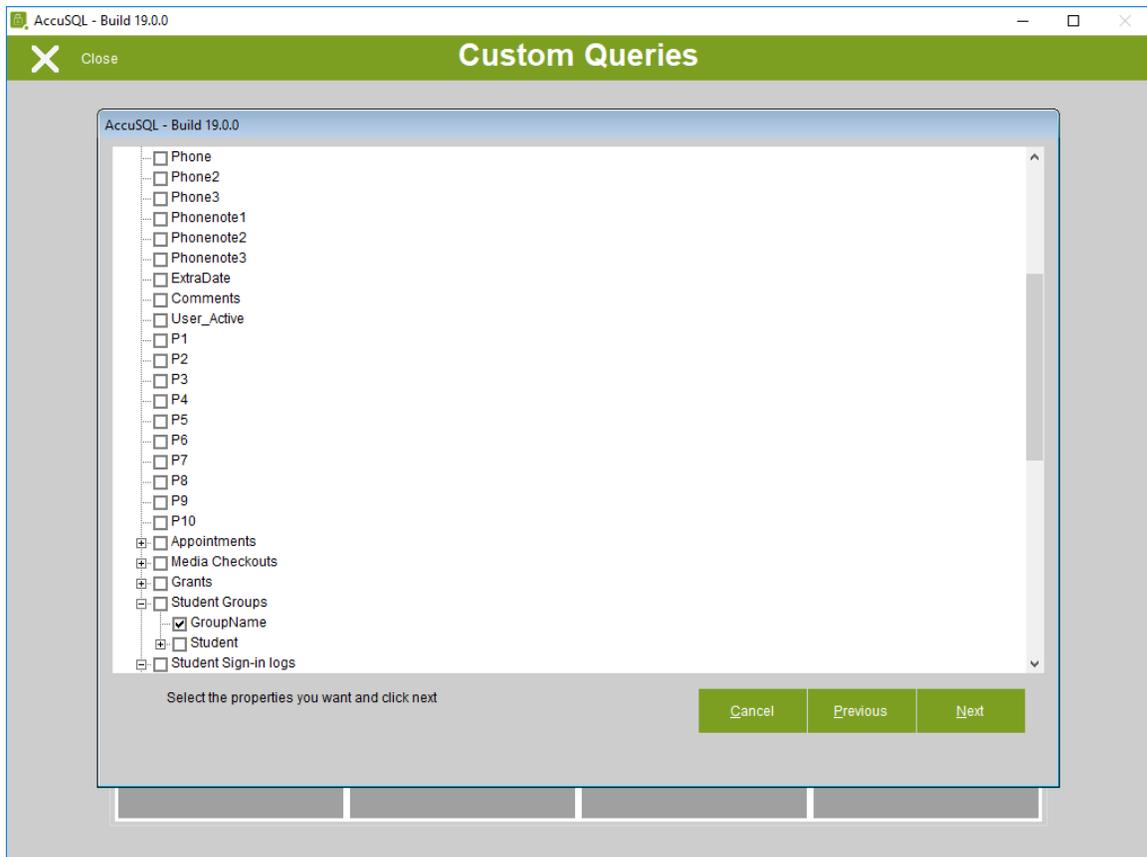
Student Sign-in Logs – Logoutime

Student Sign-in Logs – Activity – Category

Student Sign-in Logs – Activity – Activity

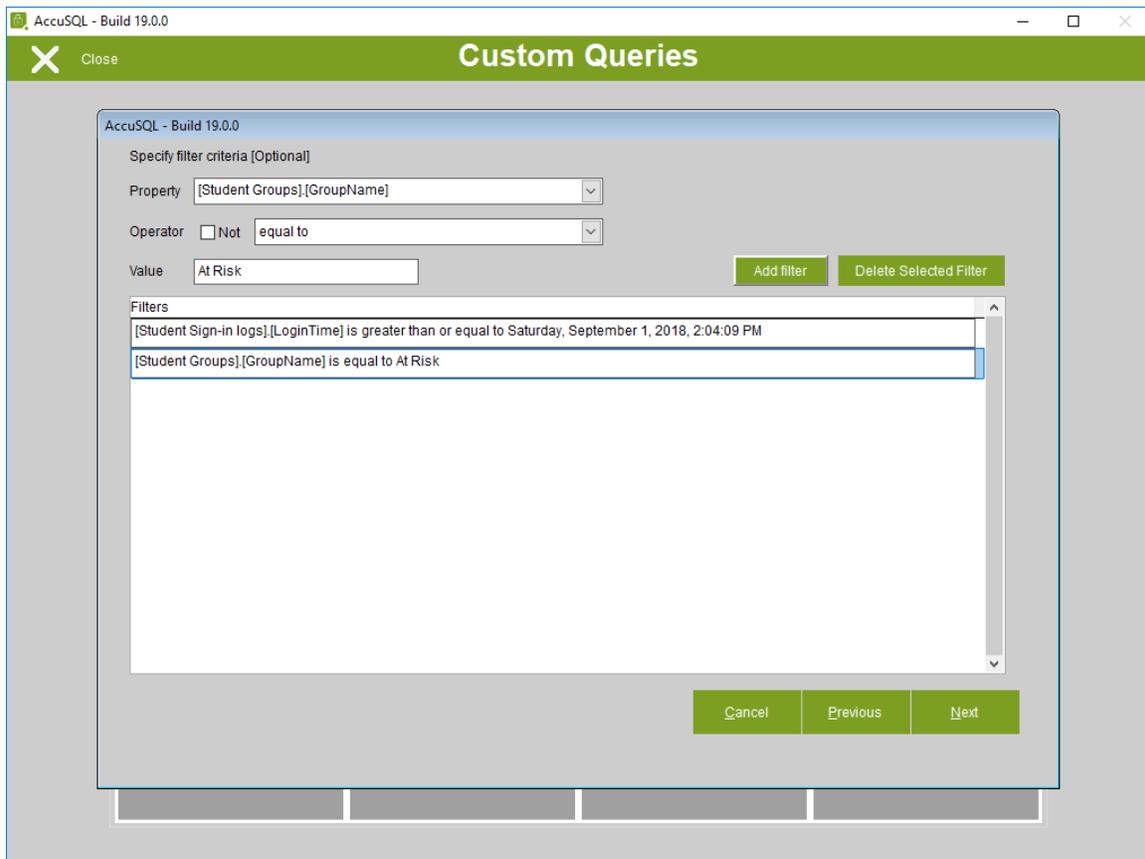
Student Sign-in Logs – Tutor – FirstName

Student Sign-in Logs – Tutor – LastName



After all the fields are selected for the report, press Next to go to the filter options.

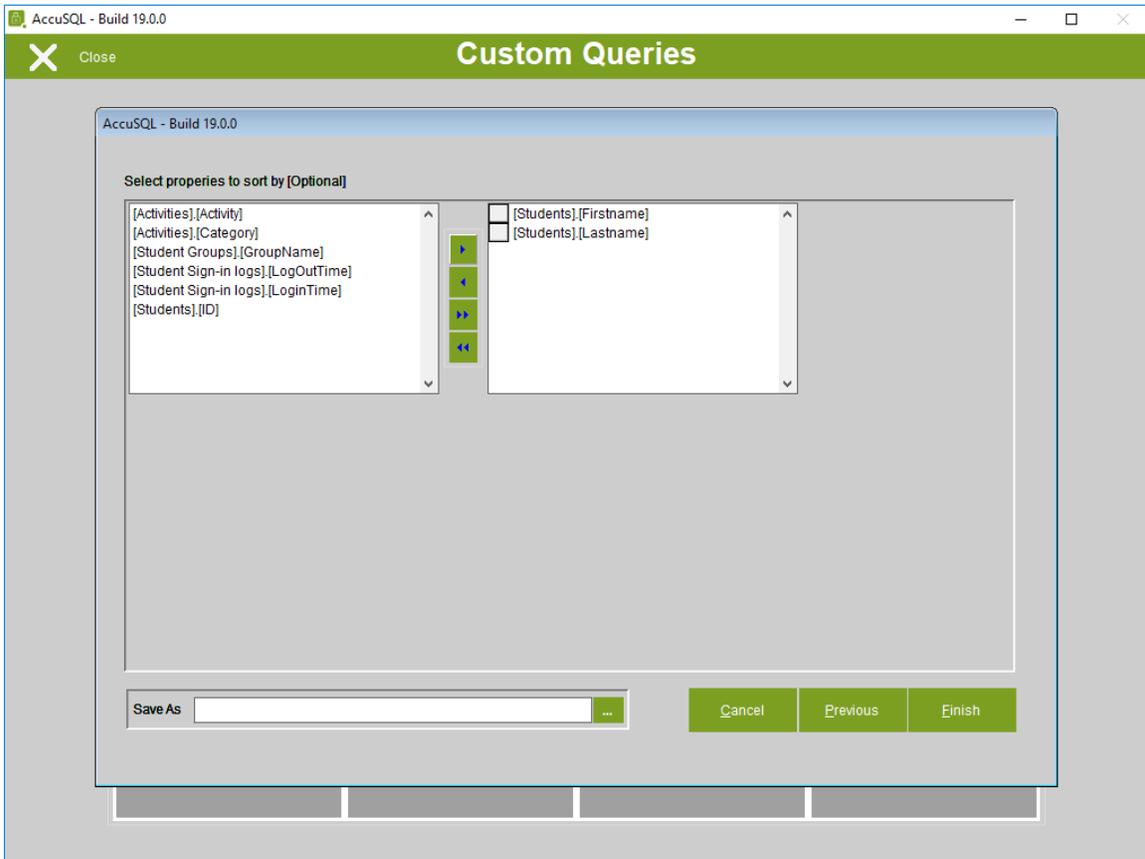
For the filter criteria, we want the [Student Groups]: [GroupName] to equal At Risk. We also want the [Student Sign-in logs]:[LoginTime] to be between 03/01/2019 and 09/01/2019.



Important: The values you enter for the filters are case specific. In the example, above, if I entered at risk I would get no results since my student group name is called At Risk (capital A and capital R).

Click Next and the sort options screen appears. In this case, I will sort on student last name, then sub-sort on student first name and then tutor last name.

I will also save the file as AtRisk030113_thru_092-2019 so I can load it later and not have to recreate the query.



When I press Finish, the report will be available for me to view in the available formats. In this case, the report has been opened in Excel.

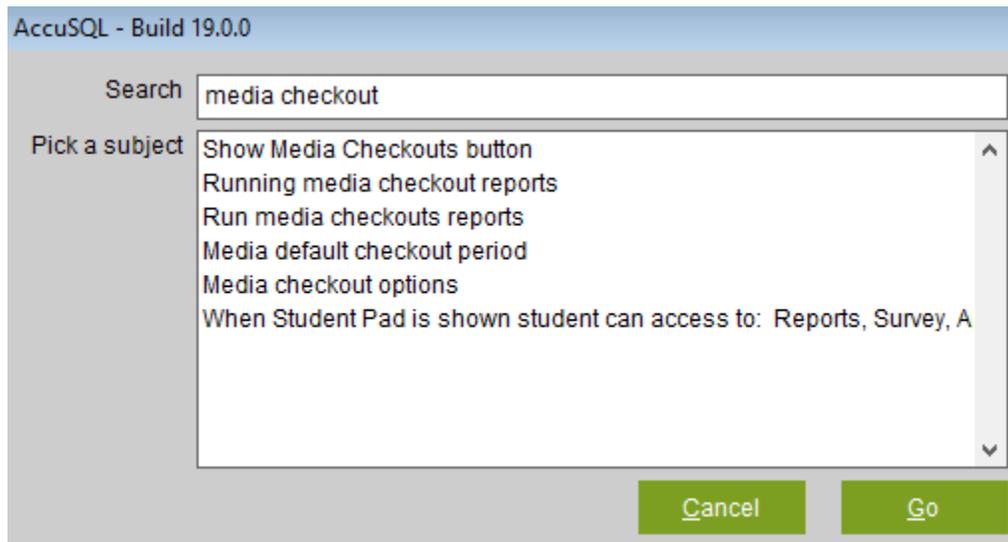
The screenshot shows a Microsoft Excel spreadsheet with the following data:

	A	B	C	D	E	F	G	H	I	J	K	L
	Lastname	Firstname	Id	Logintime	Logouttime	Category	Activity	Groupname	Studentid	Activityid		
1	Torres	Julia	6666666	12/10/2018 01:44:02 PM	12/10/2018 01:44:28 PM	Course Tutoring	Algebra 1	At Risk	101	145		
2	Torres	Julia	6666666	12/13/2018 11:55:10 AM	12/13/2018 02:55:46 PM	Computer Use	Academic Use	At Risk	101	142		
3	Torres	Julia	6666666	09/11/2018 11:55:18 AM	09/11/2018 01:49:09 PM	Computer Use	Academic Use	At Risk	101	142		
4	Thongpaen	Tawan	8888888	11/16/2018 02:40:45 PM	11/20/2018 08:54:42 AM	Computer Use	Academic Use	At Risk	103	142		
5	Thongpaen	Tawan	8888888	09/26/2018 04:18:30 PM	09/26/2018 05:18:30 PM	Course Tutoring	Software Engineering	At Risk	103	148		
6	Thongpaen	Tawan	8888888	09/11/2018 11:49:00 AM	09/11/2018 01:48:28 PM	Math Tutoring	Calculus	At Risk	103	153		
7	Thongpaen	Tawan	8888888	12/13/2018 11:57:16 AM	12/13/2018 02:57:52 PM	Math Tutoring	Calculus	At Risk	103	153		
8												
9												
10												
11												

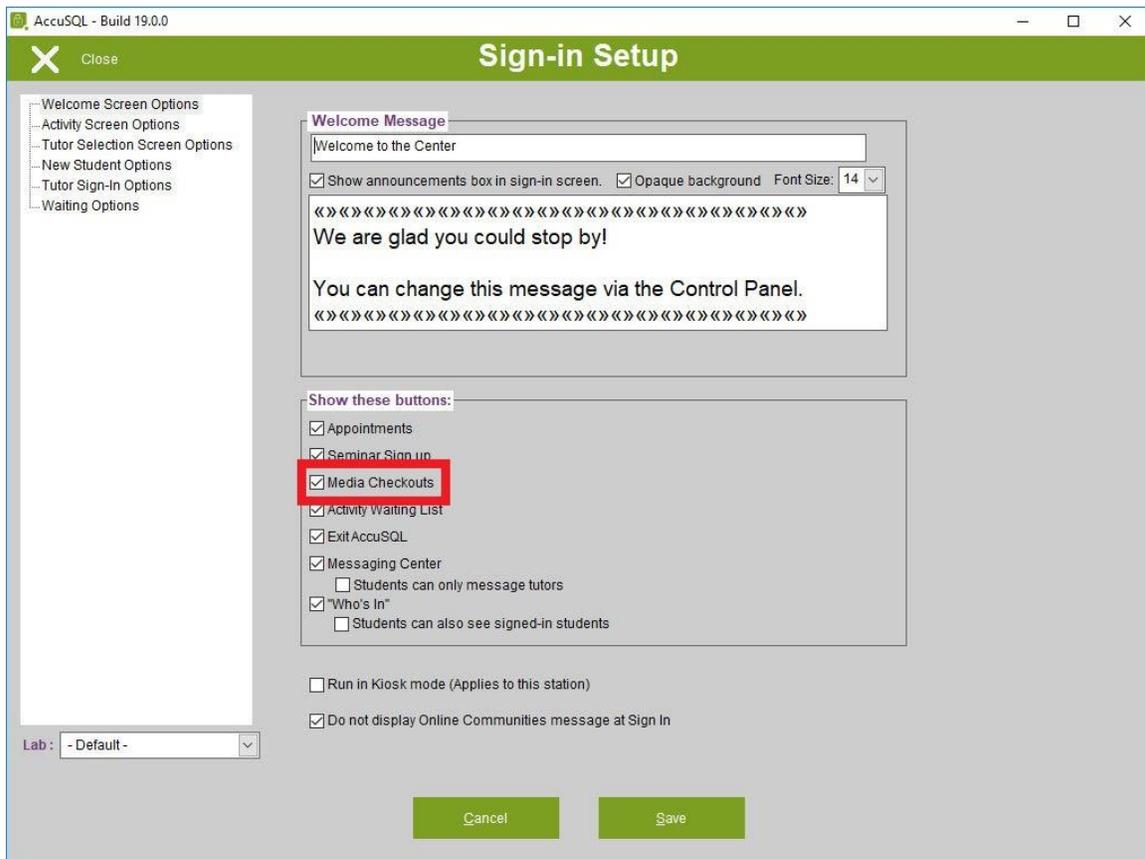
FIND

Purpose: To search AccuSQL/AccuTrack to find setup or system screens that match your search criterion.

Access: From System Administration, select Find.



Type the word or phrase you are looking for and the results will be displayed in the “Pick a subject” area. Click a subject and then click Go. AccuSQL/AccuTrack will take you either to the screen or the Setup options for the item you selected.



TECHNICAL SUPPORT

Engineerica Systems, Inc. is committed to providing the best possible technical support for its products. This section describes the technical support resources available to you for free and for purchase.

New User Support

New AccuSQL/AccuTrack Deluxe customers are entitled to the following free technical support services:

- AccuSQL/AccuTrack Web - always free.
- AccuSQL/AccuTrack Priority Telephone and Email- 10 free Support Units good for 90 days from date of purchase.

AccuSQL/AccuTrack Support Forum (http://www.accutrack.org/support/support_board.htm)

The AccuSQL/AccuTrack Support forum is an excellent place for your AccuSQL/AccuTrack questions. Questions on the Support Forum are answered by the AccuSQL/AccuTrack Team members and by other users. The Support Forum also has a *News* board that has the latest AccuSQL/AccuTrack news and announcements. There is also a *Usage Tips* section that will make your use of AccuSQL/AccuTrack even more powerful. The AccuSQL/AccuTrack Support Forum is always free for all AccuSQL/AccuTrack users.

AccuSQL/AccuTrack Priority Support

If you need support assistance on a priority basis after your free Priority Support expires, you can purchase AccuSQL/AccuTrack Priority Support. Priority Support can be purchased on a per incident basis or on an annual basis. Priority Support provides the following support services:

- **Telephone support** from 9:00a.m. to 5:00 p.m. EST Monday through Friday.
- **Priority Response** provides access to senior AccuSQL/AccuTrack staff.
- **Priority Email Support** lets you submit support requests via email.

Our goal is to respond to Priority Support requests within **24 hours**.

If you need priority telephone support, call (407) 678-0936. Telephone support hours are from 9:00AM to 5:00PM EST Monday through Friday.

You can also get Priority Technical Support via Internet email. Send Internet email to

support@accutrack.org

When you purchase AccuSQL/AccuTrack Deluxe, you receive 10 free Priority Support Units for your use during the 90 days following the date of purchase. A support Unit is 30 minutes of AccuSQL/AccuTrack staff time; any part of a Support Unit used counts as a full unit. Each telephone call and each private email uses at least one Support Unit.

Priority Support Plans

To help you purchase AccuSQL/AccuTrack Priority Support most cost effectively, we have put together several Priority Support Plans. See the AccuSQL/AccuTrack web site for descriptions of the Support Plans and pricing options. The address is:

http://www.accutrack.org/support/priority_support.htm

TROUBLESHOOTING GUIDE

AccuSQL/AccuTrack should run smoothly without errors or interruptions. If you encounter an error, then one of the following has occurred:

1. **Programming or Logic errors:** These are caused by an error in design or coding and are known as “bugs” in the computer world. Bugs can be as simple as a typo in a label to a critical error that causes the software to shutdown. If you discover a bug, **report it** to the AccuSQL/AccuTrack team as soon as possible via the on-line Support Forum:

http://www.accutrack.org/support/support_board.htm

We investigate all reported bugs and provide fixes via maintenance releases. These releases are provided for free. Due to limitations of programming resources, we can only provide maintenance releases to the latest version of the software, so make sure you report bugs ASAP to guarantee a fix.

2. **Data Corruption errors:** If a feature of the software that used to work fine in the past no longer works, then most likely you have a data or index corruption problem. Symptoms of data and index corruption range from software not recognizing users who signed in to AccuSQL/AccuTrack in the past to total lock-ups. The most common causes of data corruption are improper system shutdowns and network or hardware crashes. AccuSQL/AccuTrack 8 will inform you about these improper shutdowns via the Improper Shutdown report. If you encounter a data corruption error you must repair your data files ASAP to avoid data loss. Use the built in **data repair utility, which you can launch via the Database screen**, to fix data or index corruption.
3. **User errors:** In some cases errors are caused by misuse or misunderstanding of the software operations. To minimize operator errors, make sure to **read** the AccuSQL/AccuTrack Quick Start Manual and this Reference Manual. Also visit the AccuSQL/AccuTrack support forum to get familiar with common software issues and procedures. The AccuSQL/AccuTrack support forum is provided for free to all AccuSQL/AccuTrack users. Visit the support forum at this web page:

http://www.accutrack.org/support/support_board.htm

COMMON ISSUES

The following is a list of common issues and their solution.

Problem: AccuSQL/AccuTrack is not covering the whole **screen**. It appears in the center and I can see the rest of my desktop from the sides.

Answer: Your computer is set for a larger screen area (1024*768, 1280*1024, etc.) The larger the area the smaller AccuSQL/AccuTrack will appear. However, it will always be in the center. To make AccuSQL/AccuTrack cover the whole screen, change its area to 800*600.

Problem: The **colors** don't look right. The font is not crisp, the images are pixilated, and the background has shades of gray on it like a photo negative.

Answer: Your computer is running at low colors (16 or 256 colors). Change the setting to high color (16 bit) or true color (32 bit).

Problem: I am trying to **delete** one of the data items in the list box but the software wouldn't let me. Why?

Answer: AccuSQL/AccuTrack will not let you delete data that it needs for reports. For example, if students used to sign-in to a certain class last semester, AccuSQL/AccuTrack will need the class name for last semester reports, and won't let you delete it. If you no longer wish the display the class name to the students, make the class "inactive". See the appropriate section to see how to make a list item inactive.

Problem: The system is not accepting my administration **password**, even though it used to work a short while ago.

Answer: Passwords are case sensitive. Make sure you are entering the password in the correct capitalization.

Problem: I forgot my administration **password / ID**.

Answer: If someone else in the center has high administrative privileges, he or she can change your password. If you're the only one with access to the system, you will need to contact Engineerica Systems, Inc.

Problem: The **report** is not showing a sign-in, even though I entered the record.

Answer: Check the *reporting period* and make sure your sign-in was within this period. Also check the report filters to make sure the data you're looking for was not excluded.

Problem: I **signed in** the system, but it does not show me as signed-in.

Answer: You probably did not complete your sign-in and pressed the "Cancel" button instead of "Done". If you signed in correctly, you will see a confirmation message with your name and sign-in time.

Problem: I changed an option in the **Options screen** but the changes were not reflected in the software?

Answer: You need to save your changes in the Options screen by clicking on the “**Save**” button after you make the changes. Also, most changes will not take effect until you restart the application.

Problem: When I started AccuSQL/AccuTrack I got an error message "**Resource file** not valid. Replace with a new one?" What does this mean and how do we respond?

Answer: AccuSQL/AccuTrack uses the resource file to save settings such as the Window's position and state. For some reason, this file got corrupted and AccuSQL/AccuTrack can't read it. Click on "Yes" to overwrite with a new one. If you prefer, you can edit the config.fpw file in the folder where AccuSQL/AccuTrack is installed using notepad to bypass the resource file. This has no effect on the software. Add an entry on a new line in the file like this: RESOURCE=OFF

Problem: While using the software we got an **error message** and the program exited. What do we do?

Answer: You might have discovered a bug in the program. Write down the error message and what you were doing when the problem occurred and post the info on the AccuSQL/AccuTrack Support Forum.

Question: I have an **idea** for improving the software. How can I tell you about it?

Answer: We would like to hear about your suggestions and ideas for improving AccuSQL/AccuTrack. Please e-mail them to us at ideas@accuTrack.org.

Question: How do I **contact** you?

Answer: Best way to reach us is by e-mail. Since we spend most of our time in front of a computer screen, e-mail is convenient and quick. If you need support, post your questions on the AccuSQL/AccuTrack on-line Support Forum. For other inquires e-mail support@accutrack.org. For our latest contact info, visit the AccuSQL or AccuTrack website:

www.engineerica.com/accusql or www.engineerica.com/accutrack