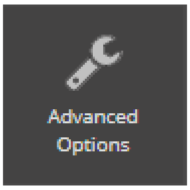
Advanced Options



This is where you configure all of the back-end settings for the **AccuTraining** software. You can set and manage the software rules, modify user roles, control attendance settings globally, and define Terminology.

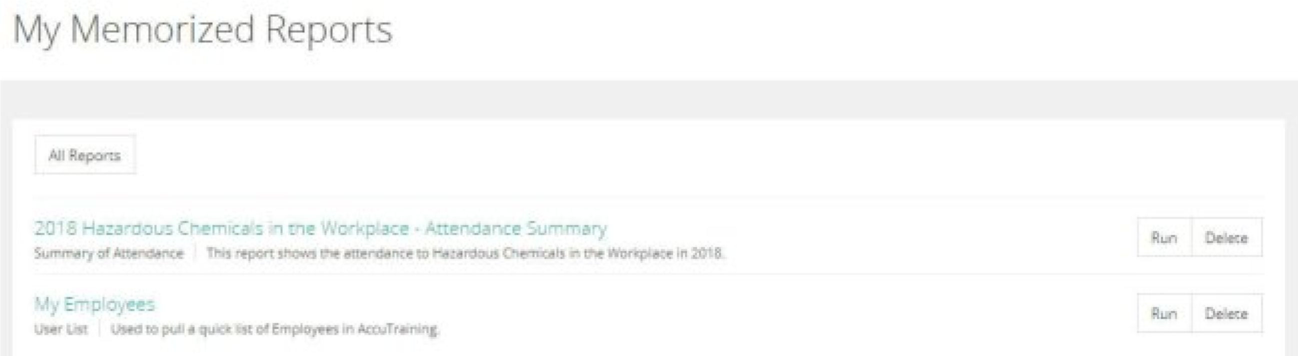
My Memorized Reports

This section is where you can view all the **Memorized Reports** you've saved from any of the **Reports** sections in **AccuTraining**.

NOTE: Not all reports in **AccuTraining** can be memorized so you will have to run some of them on their own. This is typically because of the complexity of certain reports. Here is a list of the reports that can be memorized:

- User List
- User List with Tags
- Staff List
- Employees Attendance
- Summary of Attendance
- Detailed Attendance
- New Visitors
- Session Comments
- Visits Detailed by Location
- Visits Executive Summary
- Zero Visits
- Individual Tasks by User

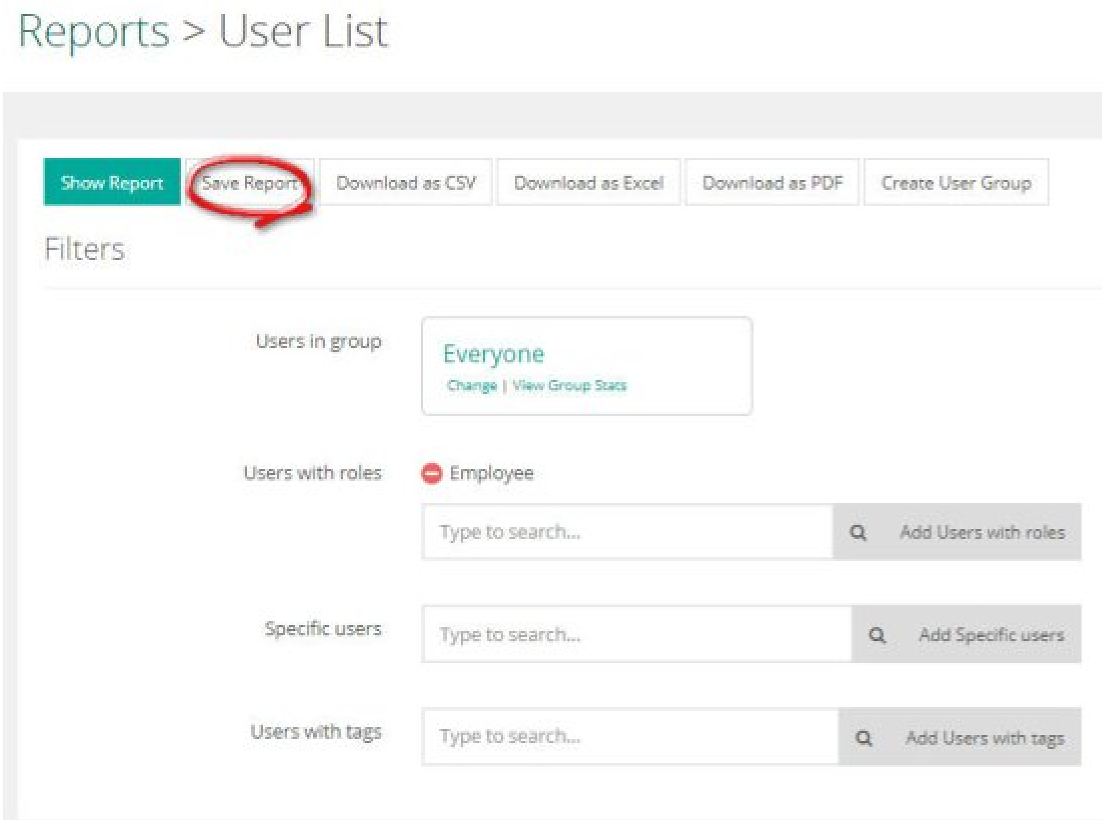
If this section is empty then click the **All Reports** button to see the Reports list and select a report to memorize.



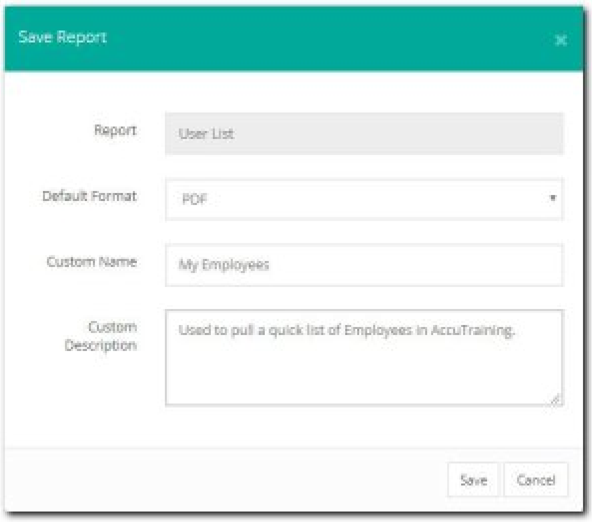
Memorize a Report

Follow these steps on how you save **Memorized Reports**:

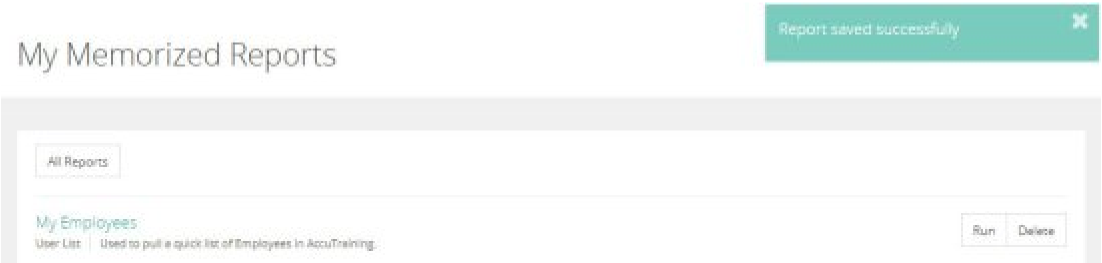
1. Find the report (from the list in the previous article) you want to memorize.
2. Now simply set the filters you need. Realize some filters are required for specific **Reports** to run properly so you may have to look at another **Report** to get the data you are looking for in a report.
3. Now click the **Save Report** button.



4. Enter a **Custom Name** for the **Memorized Report** at least, but optionally you can select a different **Default (File) Format** and add a **Description** to the **Memorized Report**:

   - 

5. Done! You will get a confirmation message and see the **Memorized Report** in the list.



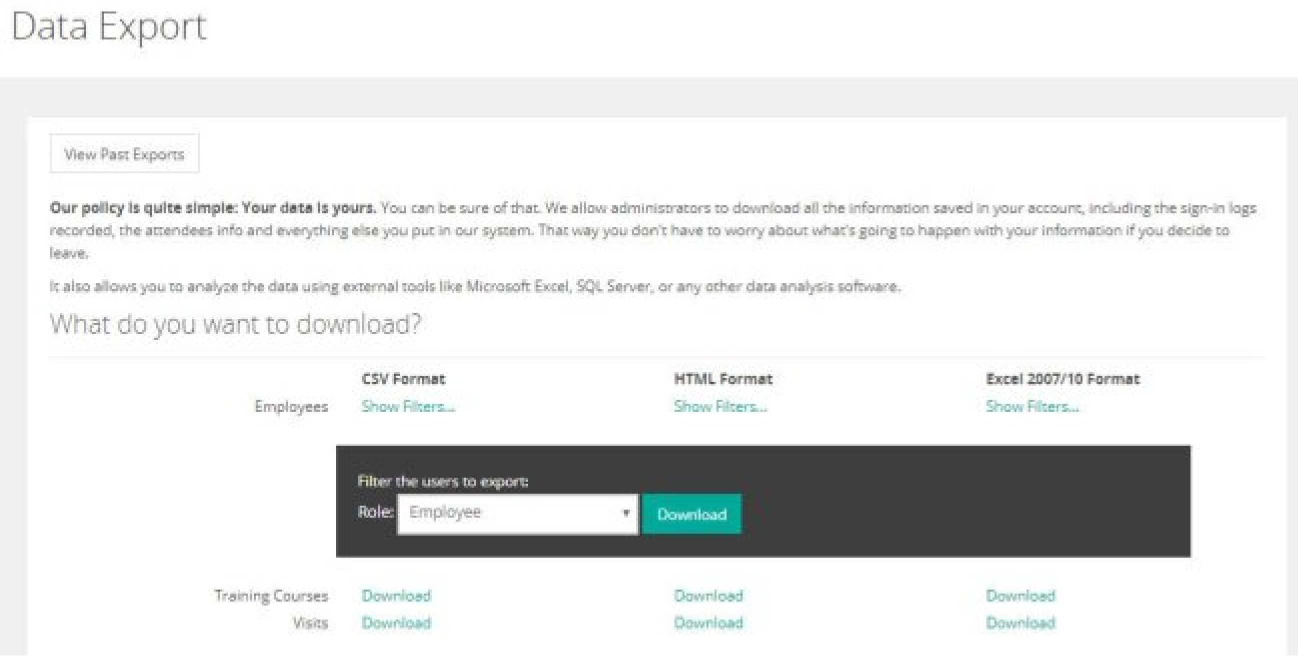
Memorized Reports Options

These are the buttons available to you in the **Memorized Reports** screen.

- **Run** - Use this option to view the **Memorized Report**.
- **Delete** - Use this option to remove the **Memorized Report**.

Export

Here you can **Export** your Users, Training Courses, and Attendance. Choose from **CSV** (Comma Seperated Values), **HTML** (Web Document), or **MS Excel 2007/2010** (XLS) formats for your export. Click the Download link to select the format you would like to download.



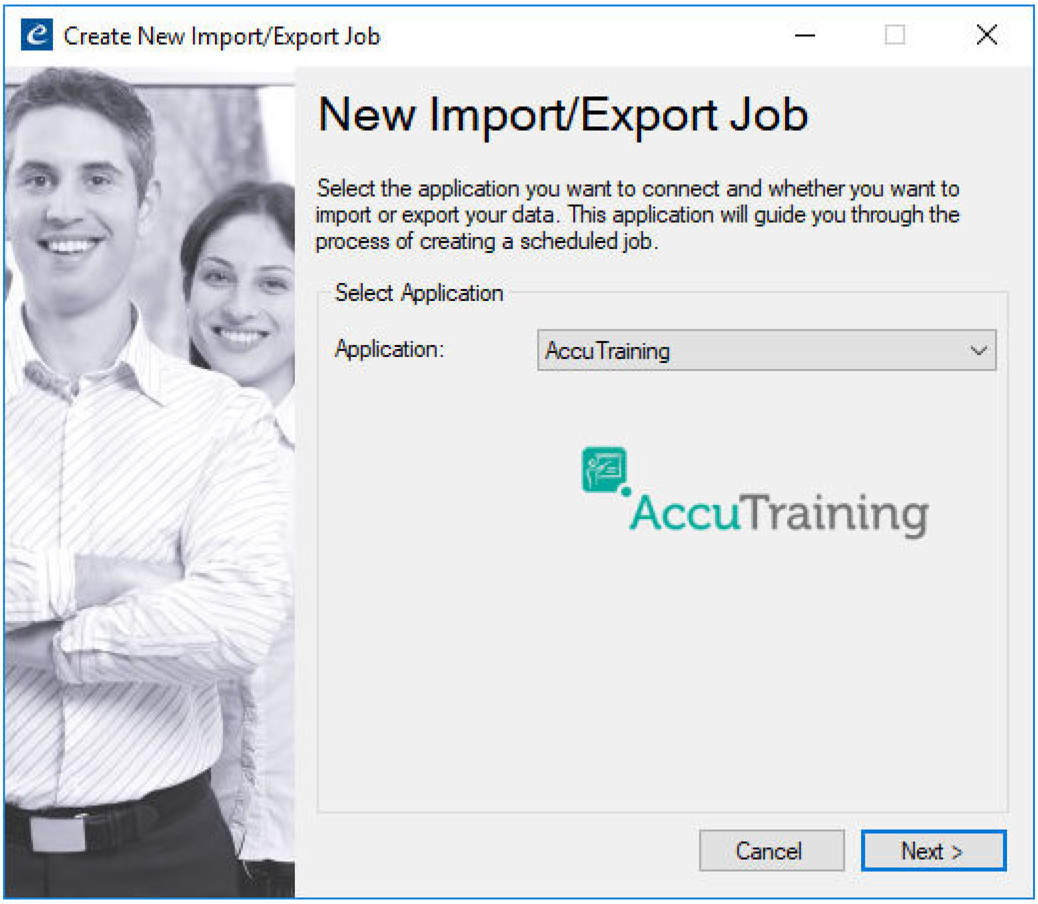
Filters can be also be set on the **Employee/User** export to limit the data returned for a particular **Role** by clicking the Show Filters... link and then choosing the **Role** in the drop-down menu. Finally click the **Download** button to get the **Export**.

Either way you go you'll get a link to download the data exported as shown below:

Schedule Data Export

If you want to schedule your data exports, download and install our tool: Download Data Exchange Tool

Create Automated Export Job



More information coming soon on how to create a new scheduled export batch file!

Import

Here's the place where you can import your **Employees or Users**, your **Training Courses** and everything to quickly get started. To make it as simple as possible we have defined a bunch of examples to follow. By creating a file as explained below, you can directly upload the file and it will recognize it as valid one, knowing completely what to do.

File Format

By now, only **Comma-Separated-Values (CSV)** files are supported. This format is broadly supported by many application including Microsoft Excel it also can be created using any simple text editor. In the first line of the file the headers must be included (check the list of valid headers below), then, the data must be included separating each column by a comma. In the case you need to write a comma in the data itself, you can prevent format errors by enclosing the full value in double quotes.

Time-Zone

Please note that before you import any courses it's important that you set the correct time-zone for your account.

To set the time-zone, please go to **Advanced Options** > **Settings** > **General** in the menu or click here.

Importing Users

This import is used to quickly upload a list of Users into the system without having to add them one-by-one. This is one of the most commonly used imports. This import process applies for all **User** types:

- **Users for role - Administrators**
- **Users for role - Operators**
- **Users for role - Employees**
- **Users for role - (Custom)**

Valid headers:

- **FirstName**
- **MiddleInitial** (optional)
- **LastName**
- **Email**
- **CardNumber**
- **Active** (optional)

Explanation:

The **Email** is used to uniquely identify the user, it must be unique across all the users in the system. It also allows users to login, to reset their password, to receive messages and notifications and a lot more things. The email has to be unique across all the users too.

The **FirstName** and **LastName** are required. It's usually displayed in the format First Last. You can also optionally specify the **MiddleInitial**

The **CardNumber** is useful if you plan to track attendance by reading physical cards using a card reader or the mobile app for iPod touch/iPhone/iPad.

The **Active** field is optional. Specifies whether the user is active or not. 'Yes' or 'No' values are accepted. Defaults to 'Yes'.

Example:

FirstName	MiddleInitial	LastName	Email	CardNumber	Active
Winnie	T	Pooh	wpooh@accuclass.com	1089	Yes
Roger		Rabbit	roger.rabbit@accuclass.com	1035	Yes
Donald		Duck	duck@accuclass.com	6584	Yes
Fred		Flintstone	fred@accuclass.com	1078	Yes
Homer	J	Simpson	homerjs@accuclass.com	1812	No

Download the example file (.CSV)

Updating Users by Card Number

Use this import to update the **Employees'** email addresses in **AccuTraining** by using their **Card number**. This is sometimes needed if they were created without an email or you need to update their emails from a file. There 2 other similar options as well to update their email if updating them via the **Card number** does not work for you.

Valid headers:

- **CardNumber**
- **NewEmail**

Explanation:

The **CardNumber** is required. It's used to find the user and update their email address.

The **NewEmail** is required. This will be the new email address associated to the user.

Example:

CardNumber	NewEmail
1089	wpooh@institution.com
1035	roger.rabbit@institution.com
6584	duck@institution.com
1078	fred@institution.com
1812	homerjs@institution.com

Download the example file (.csv)

Updating Users by Old Email

Use this import to update the **Employees'** email addresses in **AccuTraining** by using their previous "**Old Email**." This is sometimes needed if they you need to update their emails from a file. There 2 other similar options as well to update their email if updating them via the **Old Email** does not work for you.

Valid headers:

- **OldEmail**
- **NewEmail**

Explanation:

The **OldEmail** is required. It's used to find the user and update their email address.

The **NewEmail** is required. This will be the new email address associated to the user.

Example:

OldEmail	NewEmail
wpooh@institution.com	wpooh@gmail.com
roger.rabbit@institution.com	roger.rabbit@yahoo.com
duck@institution.com	duck@hotmail.com
fred@institution.com	fred@ask.com
homerjs@institution.com	homerjs@fake.com

Download the example file (.csv)

Updating Users by Phone Number

Use this import to update the **Employees'** email addresses in **AccuTraining** by using their **Phone number**. This is sometimes needed if they were created without an email or you need to update their emails from a file. There 2 other similar options as well to update their email if updating them via the **Phone number** does not work for you.

Valid headers:

- **PhoneNumber**
- **NewEmail**

Explanation:

The **PhoneNumber** is required. It's used to find the user and update their email address.

The **NewEmail** is required. This will be the new email address associated to the user.

Example:

PhoneNumber	NewEmail
202-555-0160	wpooh@institution.com
202-555-0137	roger.rabbit@institution.com
202-555-0170	duck@institution.com
202-555-0190	fred@institution.com
202-555-0110	homerjs@institution.com

Download the example file (.csv)

Updating Users Status

This import can help you inactivate the **Users** or **Employees** you no longer need to have access to the system.

Valid headers:

- **Email**
- **Active**

Explanation:

The **Email** is used to identify the users and update their active status.

The **Active** field is optional. Specifies whether the user is active or not. '**Yes**' or '**No**' values are accepted. Defaults to '**Yes**'.

Example:

Email	Active
wpooh@institution.com	Yes
roger.rabbit@institution.com	No
duck@institution.com	Yes
fred@institution.com	Yes
homerjs@institution.com	No

Download the example file (.csv)

Importing Training Courses

This import is used to quickly upload a list of all your **Training Courses** so you don't have to manually add them one-by-one. This is one of the most commonly used imports.

Valid headers:

- **Code**
- **Name**
- **Details** (optional)
- **Department** (optional)
- **Term**
- **Schedule** (optional)

Explanation:

The training Course **code** has to be unique for each term. If there are 2 (or more) training Courses with the same code, in the same term, they will be merged. The **Name** is just a friendly name that will help you visually identify the training Course, it's usually displayed along with the **Code**.

The **Term** column refers to the term in your account, it's mandatory and it must exist before you import the training Course file. The terms are not automatically created to reduce to possibility of errors.

The **Group** is optional and it's useful to tie training Courses together.

The **Department** is optional.

The **Schedule** field needs to have the following format: **<days_of_week or meeting_date> <start>-<end> <location>**

Where:

- **<days_of_week>** is the list of days of the week when the training Course is given, without spaces. For example: **MWF** means that the training Course is given every **Monday**, **Wednesday** and **Friday**. The days must be specified using the following letters:
  - **M** = Monday
  - **T** = Tuesday
  - **W** = Wednesday
  - **R** = Thursday
  - **F** = Friday
  - **S** = Saturday
  - **U** = Sunday
- **<meeting_date>** is a date in **YYYYMMDD** format that specifies a one-time training Course. For example: **20191007** specifies that the training Course is on October 7th, 2019.
- **<start>** is the start time of the training Course, in **military time**. For example 900 or **0900** refers to 9:00 AM, **1730** refers to 5:30 PM.
- **<end>** is the end time of the training Course, in **military time**. Please note that it has to be **separated from the *start time* using a hypen (-)**.
- **<location>** is the name of the **location** where it's given.

Full example (Mondays and Thursdays, from 9am to 10:30am in the location A-101):
MR 900-1030 A-101

Full example (July 29th, 2013 from 3pm to 5:45pm in the location A-101):
20130729 1500-1745 A-101

You can specify multiple times or locations separating them by a slash (/), for example:
MWF 900-1030 A-101 / TR 1400-1530 A-201 / 20130815 1100-1230 A-203

Example:

Code	Name	Details	Department	Term	Schedule	Group
ACCT-1100-01	Financial Accounting I	Course details	Economics	Spring 2015	MW 900-1040 A-101	ACCT-1100
BIOL-1111-02	Biology I	Course details	Medicine	Spring 2015	TF 1500-1620 A-102	BIOL-1111
TCDW-1205-01	Technical Drawing I	Course details	Industrial Design	Spring 2015	WS 900-1040 A-201	TCDW-1205
TCMO-0101-03	3D Modeling	Course details	Industrial Design	Spring 2015	R 900-1040 A-202	TCMO-0101
HISE-1212-B	European History	Course details	History	Spring 2015	TR 1300-1400 A-101	HISE-1212

Download the example file (.CSV)

Importing Groups

This import helps by creating **Employee Groups** in the system that you can use as **Filters** on reports and **Rules** to help automate your tracking process.

Valid headers:

- **Name**
- **Description** (optional)
- **Shared** (optional)

Explanation:

Field **name** is required. It uniquely identifies the group and is displayed across the different screens in the system that use groups.

Field **description** is optional. This is the place to add extra information of the group.

Field **shared** is optional. It specifies if the group is private for the person that created the group or shared with other users in the system.

Example:

GroupName	Role	Access
Administrators group	Administrator	edit
Administrators group	Administrator	view
Administrators group	Employee	view
Employees that attended training yesterday	Administrator	edit

Download the example file (.csv)

Importing Group - Access Roles

This option applies to any **Custom User Group** in **AccuTraining** you've uploaded or created manually. This import allows me to update the **Users' Access Roles** by the **Group** they belong to in **AccuTraining**.

Valid headers:

- **GroupName**
- **Role**
- **Access**

Explanation:

Field **groupname** is required. It identifies the group whose access roles have to be imported.

Field **role** is required. It specifies the name of the role that have to be imported.

Field **access** is required. It specifies if users with the specified role will have edit or view access to the group. Supported values are '**edit**' or '**view**'.

Example:

GroupName	Role	Access
Administrators group	Administrator	edit
Administrators group	Administrator	view
Operators Group	Employee	view
Managers	Administrator	edit

Download the example file (.csv)

Importing Group - Scope

This option applies to any **Custom User Group** in **AccuTraining** you've uploaded or created manually. This import allows me to update the **Users' Scope** by the **Location** they are assigned to in **AccuTraining**.

Valid headers:

- **GroupName**
- **Location**

Explanation:

Field **groupname** is required. It identifies the group whose scope has to be imported.

Field **location** is required. It specifies the name of the location that has to be imported as the scope of the group.

Example:

GroupName	Location
Operators Group	Training RM 101-A
Operators Group	Training RM 102
Operators Group	Training RM 103

Download the example file (.csv)

Assigning Group to Users

This option applies to any **Custom User Group** in **AccuTraining** you've uploaded or created manually. This import allows me to assign the **Users** to a **Employee Group** in **AccuTraining**.

Valid headers:

- **GroupName**
- **UserEmail**

Import Options

- **Remove users from Group not being imported** - When importing this particular import you'll be presented with this option which is helpful when needing to update the members of a group in **AccuTraining**.

Explanation:

Field **groupname** is required. It identifies the group whose scope has to be imported.

Field **useremail** is required. It uniquely identifies a user in the system that must be imported into a group.

Example:

GroupName	UserEmail
Operators Group	employee-101@trainme.com
Operators Group	employee-098@trainme.com

GroupName	UserEmail
Operators Group	employee-031@trainme.com

Download the example file (.csv)

Importing Tags

This option allows you to create new **Tags** in **AccuTraining** without creating the manually. **Tags** can be helpful when setting up **Rules** for automation in the system.

Valid headers:

- **Name**
- **description** (optional)

Explanation:

Field **name** is required. It uniquely identifies the tag and is displayed across the different screens in the system that use tags.

Field **description** is optional. This is the place to add extra information of the tag.

Example:

Name	Description
Maintenance Level 1	This is the "Maintenance Level 1" crew and is used for users who are part of this group.
Maintenance Level 2	This is the "Maintenance Level 2" crew and is used for users who are part of this group.
Employee of the Month	This is the "Employee of the Month" tag and is used to designate these special users.

Download the example file (.csv)

Importing Tag - Access Roles

This option works with any **Tag** in **AccuTraining** you've uploaded or created manually. This import allows me to update the **Users' Access Role** by the **Tag** they are assigned to in **AccuTraining**.

Valid headers:

- **Tag**
- **Role**

- **Access**

Explanation:

Field **tag** is required. It identifies the tag whose access roles have to be imported.

Field **role** is required. It specifies the name of the role that have to be imported.

Field **access** is required. It specifies if users with the specified role will have **edit** or **view** access to the tag. Supported values are '**edit**' or '**view**'.

Example:

Tag	Role	Access
Maintenance Level 1	Administrator	edit
Maintenance Level 2	Administrator	edit
Maintenance Level 1	Employee	view
Maintenance Level 2	Employee	view

Download the example file (.csv)

Importing Tags - Scope

This option works with any **Tag** in **AccuTraining** you've uploaded or created manually. This import allows me to update the **Users' Scope** by the **Tag** they are assigned to in **AccuTraining**.

Valid headers:

- **Tag**
- **Location**

Explanation:

Field **tag** is required. It identifies the tag whose scope has to be imported.

Field **location** is required. It specifies the name of the location that has to be imported as the scope of the tag.

Example:

Tag	Location
Maintenance Level 1	Training Room 101-A
Maintenance Level 2	Training Room 101-A
Maintenance Level 1	Training Room 102

Tag	Location
Maintenance Level 2	Training Room 102

Download the example file (.csv)

Assign Tags to Users

This option allows you to update **Tags** in **AccuTraining** for a specific **User**.

Valid headers:

- **Tag**
- **UserEmail**

Import Options

- **Remove tag from users not being imported** - This option allows you to remove **tags** from **users** with the specified **tags** that are not being uploaded in this file.

Explanation:

Field **tag** is required. It identifies the tag whose users have to be imported.

Field **useremail** is required. It uniquely identifies a user in the system that must be assigned a particular tag.

Example:

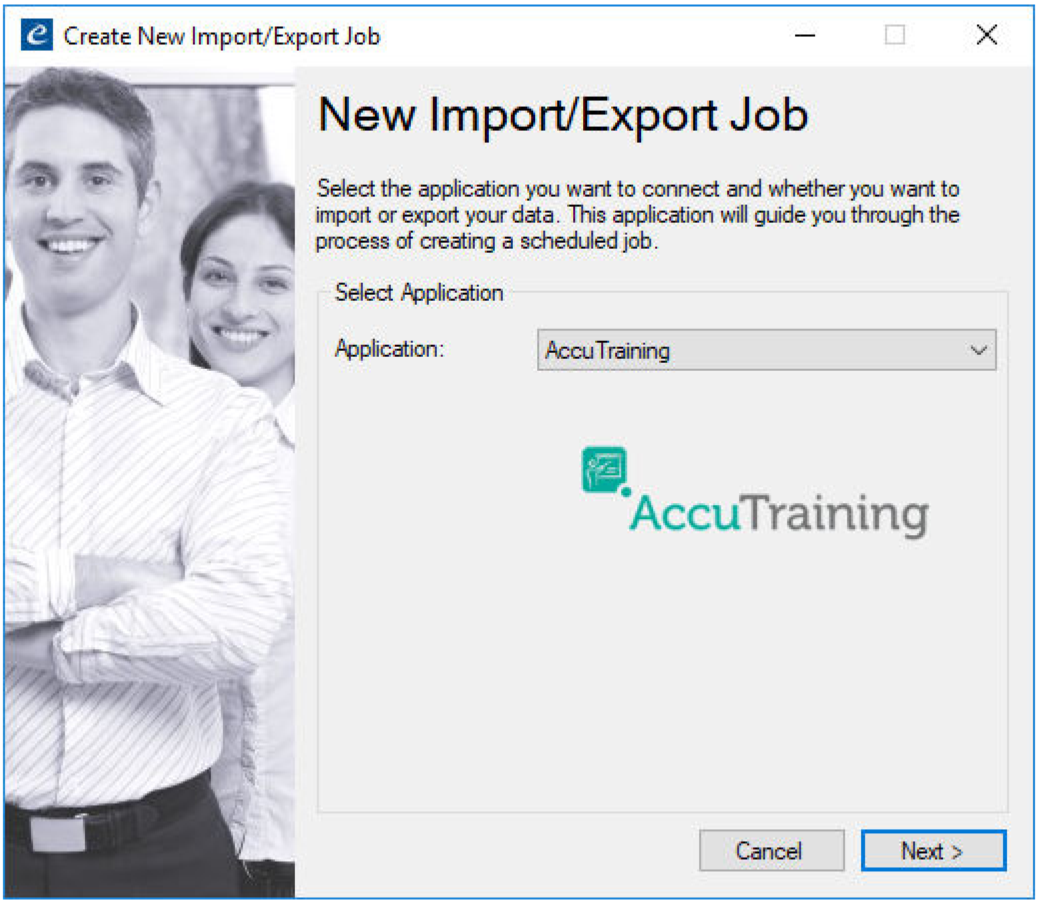
Tag	UserEmail
Maintenance Level 1	employee-001@trainme.com
Maintenance Level 2	employee-002@trainme.com
Maintenance Level 1	employee-005@trainme.com
Maintenance Level 2	employee-021@trainme.com

Download the example file (.csv)

Schedule Data Import

If you want to schedule your data imports, download and install our tool: Download Data Exchange Tool

Create Automated Import Job



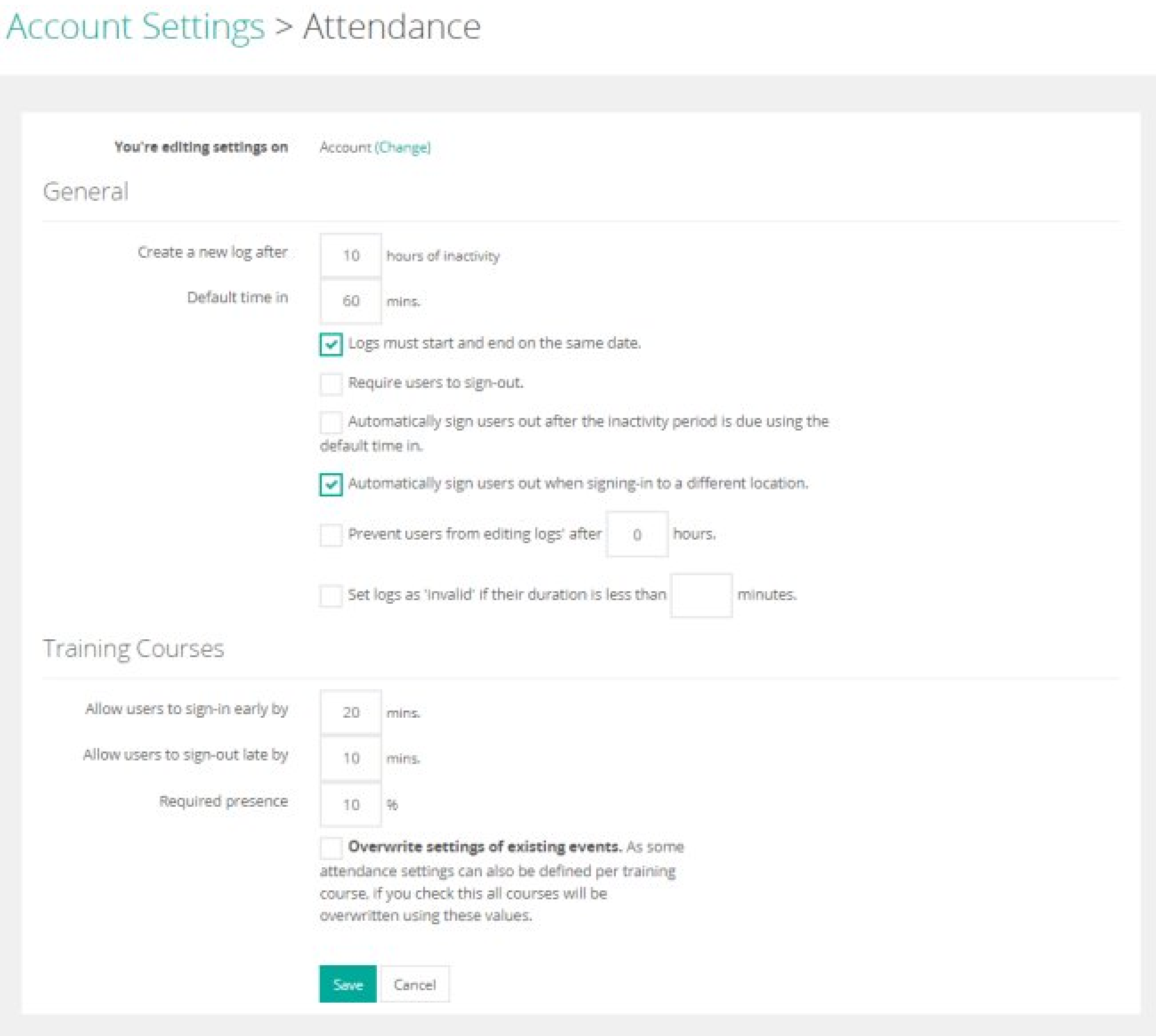
More information coming soon on how to create a new scheduled import batch file!

Settings

The following are all the control options in an easy to navigate control panel. The **Settings** control every aspect of how the **Users** interact with the system.

Attendance

These are the rules setup for sign-ins or sign-outs to **Training Courses**. Basically these are your **Attendance** tracking settings like if sign-outs are required, what the required presence percentage is to get credit in the **Training Coureses**, etc.



General Attendance Settings

- **Create a new log after *W* hours of inactivity** - This option tells the system to make the **Employee**'s next swipe a sign-in if they never signed-out in the amount of time set (***W***).
- **Default time in *X* mins.** - This is the typical time an **Employee** should be signed-in for a **Training Course** session. And this can be configured to be given to them if they reach the threshold above.
- **Logs must start and end on the same date.** - Use this option if users will not be logging into **AccuTraining** overnight.
- **Require users to sign-out.** - Use this option to not require sign-outs from **Training Course** sessions.
- **Automatically sign users out after the inactivity period is due using the default time in.** - This is checked if you would like ***X*** to be given to them if they reach the ***W*** threshold above.
- **Automatically sign users out when signing-in to a different location.** - This option is set by default and will prevent someone from being signed into multiple locations at once.
- **Prevent users from editing logs' after *Y* hours.** - This prevents admins and other users with access to edit the **Session Logs** from making changes after ***Y*** hours.
- **Set logs as 'invalid' if their duration is less than *Z* minutes.** - If the an **Employee** signs-

in and then immediately signs-out within ***Z*** then the log itself is marked as invalid and will not count toward their **Training Plan** progress.

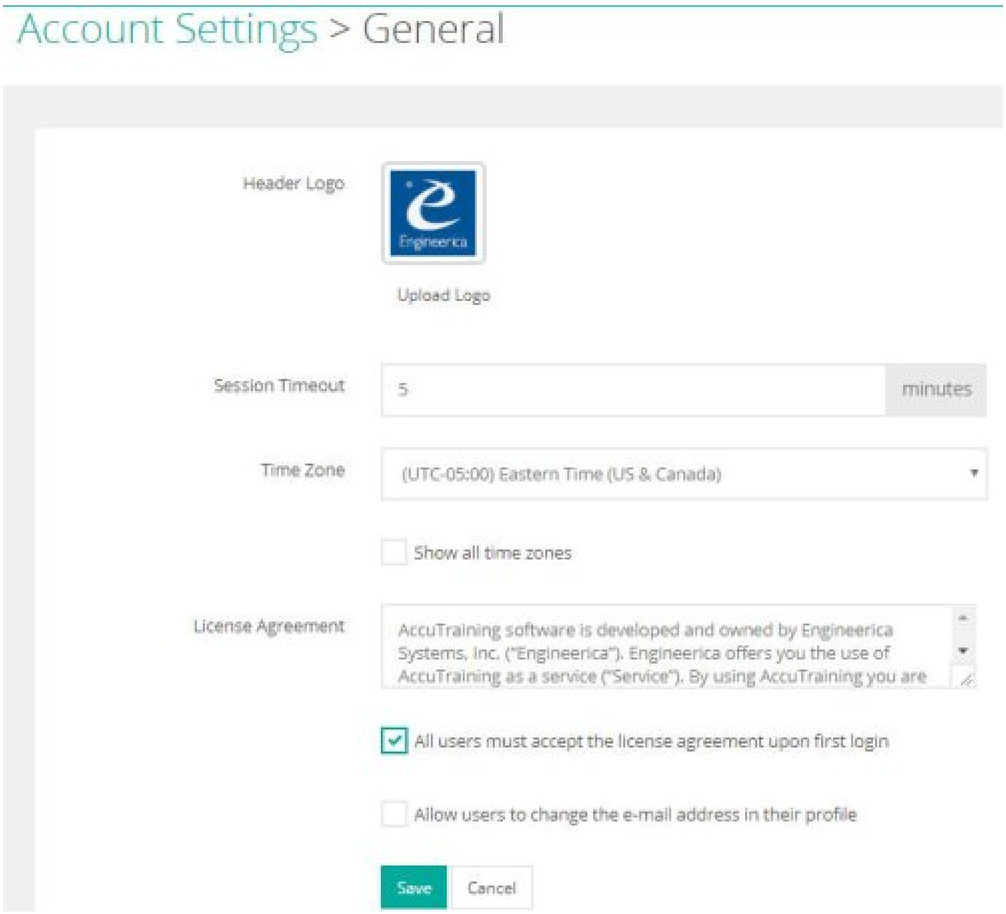
Training Course Attendance Settings

- **Allow users to sign-in early by *X* mins.** - ***X*** is the amount of time that the **Employee** is allowed to sign-in early.
- **Allow users to sign-out late by *Y* mins.** - ***Y*** is the amount of time that the **Employee** is allowed to sign-out late.
- **Required presence *Z* %** - ***Z*** is the percentage of time that **Employee** must have attended the **Training Course** session to receive credit on their **Training Plan**.
- **Overwrite settings of existing events.** - As some attendance settings can also be defined per **Training Course**, if you check this all courses will be overwritten using these values.

General

Location: *Advanced Options > Settings > General*

Purpose: This are allows you to setup the general account settings such as the time-zone, user profiles, etc.



Header Logo

This can be the company logo or even the training series logo which will appear on the **Badges** by default.

Session Timeout

This is the time in minutes that they have until they are will be automatically Signed-out of a session.

Time-zone

This is a very important setting and is there so **AccuTraining** can tell the Apple/Android devices what **Timezone** the **Training Course** sessions will take place.

By default only the 4 continental U.S. time-zones show up but you can check the box to show all time-zones if you are doing the training outside of the U.S. time-zones.

License Agreement

This is a text area that can be presented to new **Employees/Users** upon login that they would have to agree to in order to proceed and access the system.

The corresponding checkbox below the textbox determines if the **Employees** must accept this **License Agreement** and if it is displayed to the **Employees** upon their first login.

- **All users must accept the license agreement upon first login**

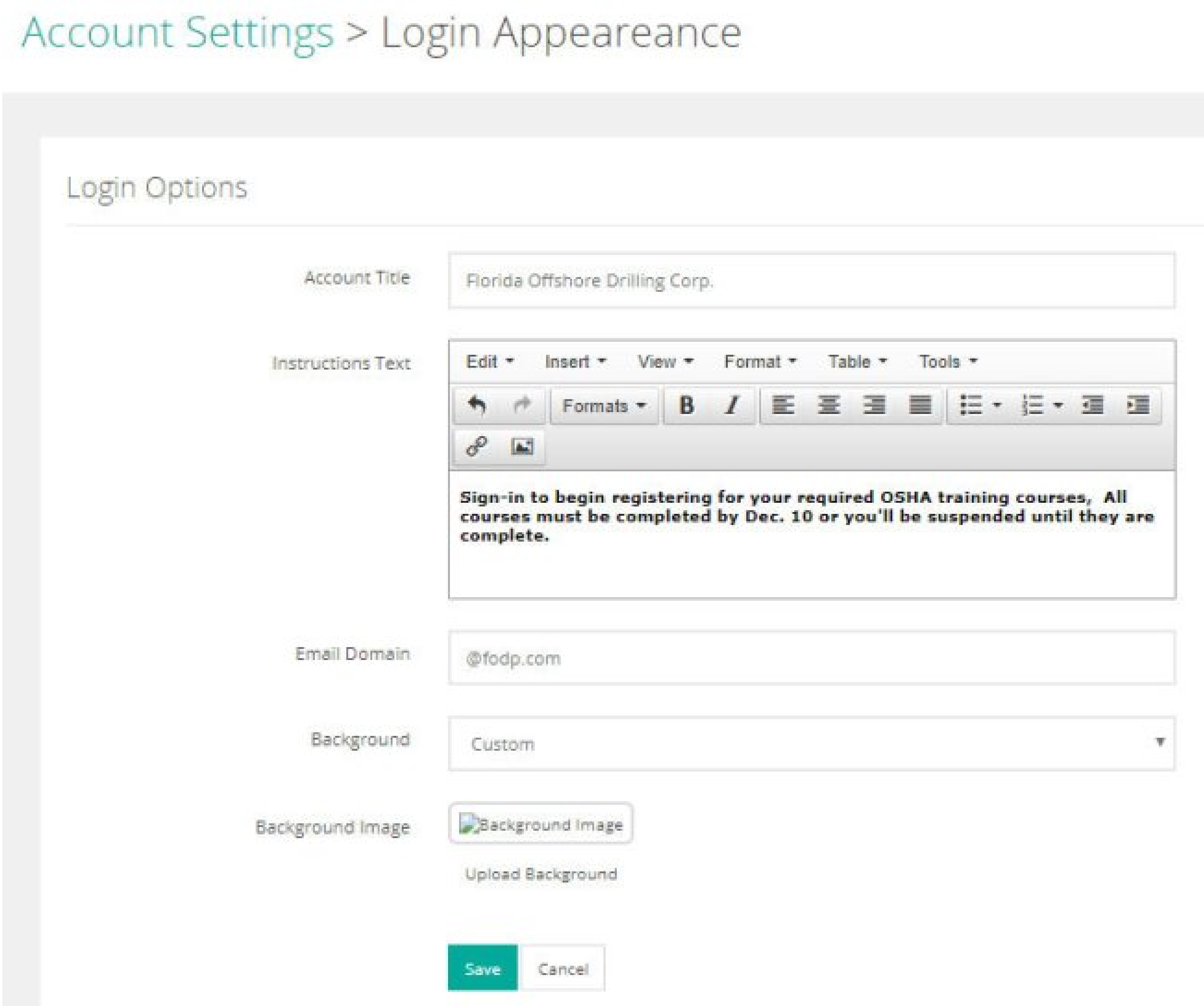
General Options

Enable this option if you want to allow **Employees** who login to the https://accutraining.net website to be able to change their email address.

- **Allow users to change the e-mail address in their profile**

Login Appearance

Select these options to determine the appearance of the login screen for your **Employees**.

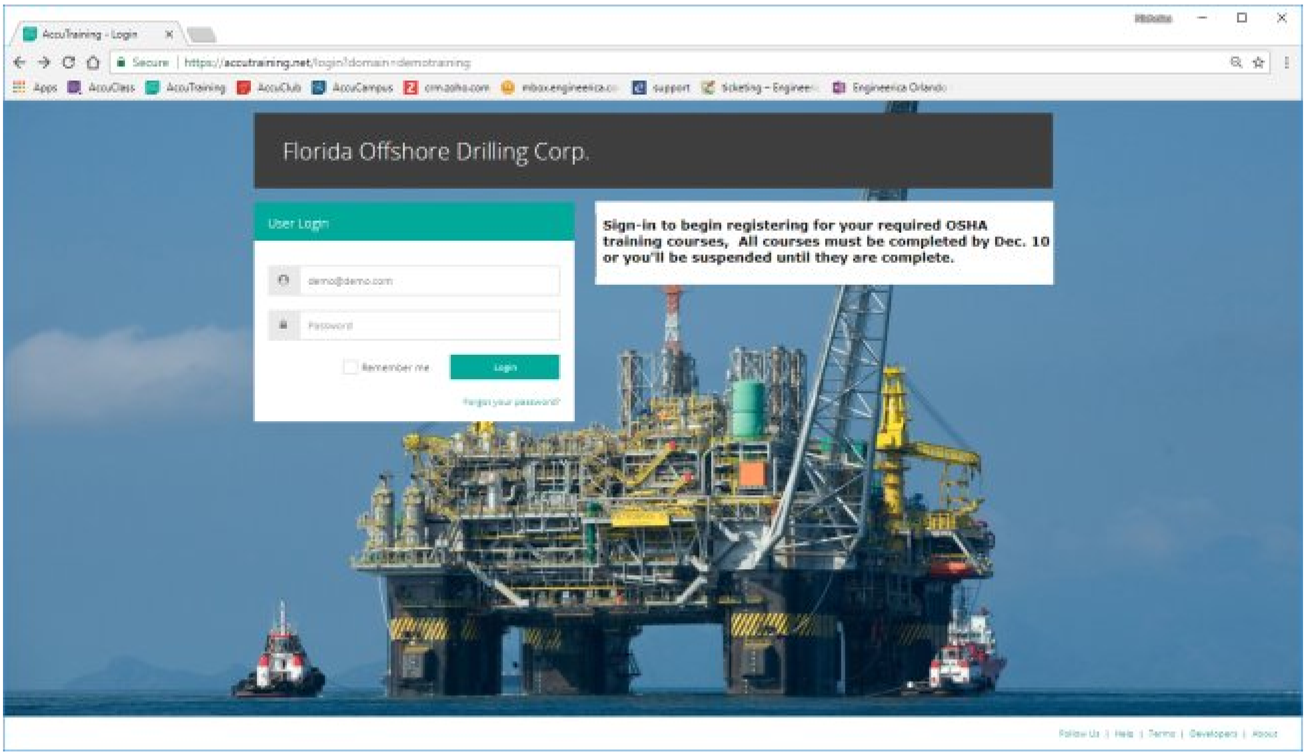


These are the configuration options:

- **Account Title** - This is the name of the **Company** you want to appear at the top of the login screen.
- **Instructions Text** - This is the instructions to the **Employees** you want to appear at the middle-right of the login screen.
    - **Format Tools** - These tools allow you to edit the **Instructions Text** to your desired look. ***NOTE:*** *This area may not appear if you are using Internet Explorer (IE) and we recommend using either Mozilla Firefox or Google Chrome.*
- **Email Domain** - This is an option you can use to pre-fill some of the data in this field especially if you have a long domain it may take off some time and extra typing effort by using this option. Typically something like “@mycompany.com” is what you would use.
- **Background** Choose one of 3 options:
    1. **Shuffle Images** - This is the default that shuffles through generic business training backgrounds.
    2. **Simple Image** - Use this option if you want just a simple white background.
    3. **Custom Image** - Use this option if you have an image you would like to use as the login screen's background.
- **Background Image** - This section along with an **Upload Background** button appears if you have selected a **Custom Image** in the previous option. Click on the **Upload Background** button, find & select the image file, and click open. Now it should show that the image uploaded successfully.

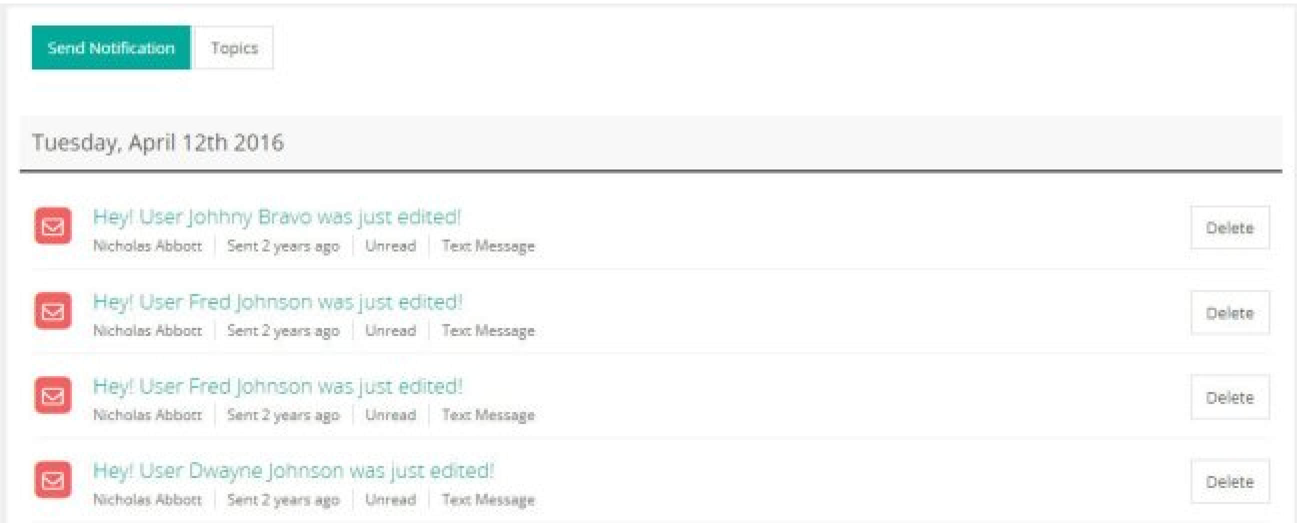
Be sure to click the **Save** button at the bottom of your screen to save any changes you've made in this section.

Once you customize these settings the login screen should appear similar to this:



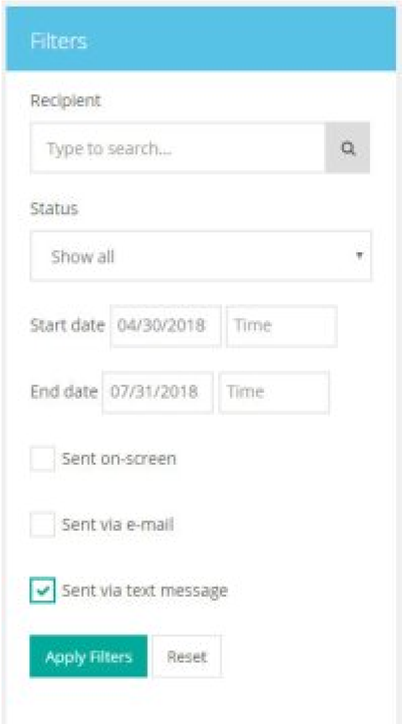
Notifications

This area is your notifications section where you can define notification topics, send notifications via e-mail, text message, and/or the login screen.



Notification Filters

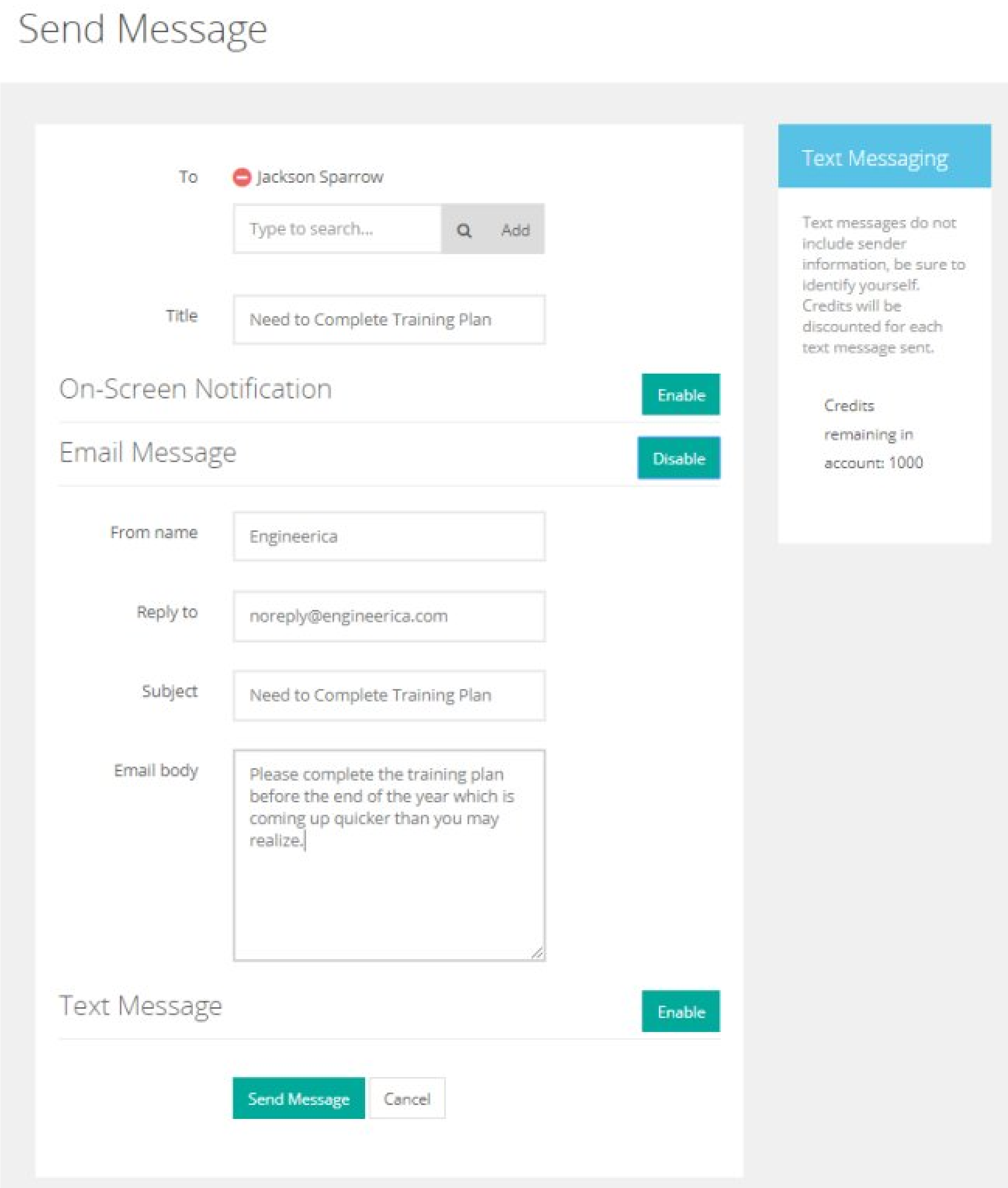
Use these options to filter what notifications/messages you want to view:



- **Recipient** - This option filters on a specific message(s) to an **Employee**.
- **Status** - This option filters on a specific message(s) that have been read, unread, or just displays all.
- **Start date** (Date/Time) - This option filters on message(s) from a specific date & time.
- **End date** Date/Time - This option filters on message(s) before a specific date & time. Can be combined with previous filter to see a specific date range.
- **Sent method**
  - **on-screen** - This option shows messages that were delivered on-screen.
  - **e-mail** - This option shows messages that were delivered via e-mail.
  - **text message** - This option shows messages that were delivered via SMS text message.

Send Notification

To send a notification/message to an Employee do the following:



1. Click the **Send Notification** button.
2. Fill-out the information:
    - **To** - Use this field to look up the **User/Employee** you want to send the message.
    - **Title** - This will be what is displayed in the list of messages.
    - **On-Screen Notification** - click the **Enable** button if you want to show an on-screen message when they sign-in to the back-end or at the **Training Course**. If enabled complete the following additional items:
        - **Body** - Use this section to complete the message body.

        - **Class** - Choose from 4 options that make the importance display more drastically:
            - **Information** - This option displays a **blue-colored text box**.
            - **Success** - This option displays a **teal-colored text box**.
            - **Warning** - This option displays a **orange-colored text box**.
            - **Error** - This option displays as a **black-colored text box**.
        - **Duration**
            - **Short (5 seconds)**
            - **Medium (15 seconds)**
            - **Long (30 seconds)**
        - **More information** - Choose to “Show” or “Do not Show” the more information link.
        - **Custom URL** Use this option to provide a URL for “more information.”
          NOTE: *To navigate to a page in this site add a '/' at the beginning of the URL (eg, /users/list), otherwise add:*
          'http://'
        - **Show on Sign-in Station** - Use this option to show on the sign-in station
    - **Email Message** - click the **Enable** button if you want to send an email message to them. If enabled complete the following additional items:
        - **From name** This defaults to the company name on the account.
        - **Reply to** This is where you want replies to go to if they reply. This defaults to: noreply@engineerica.com
        - **Subject** - This is the Email's subject line you want them to see.
        - **Email body** - This is the **Email's** body you want them to see.
    - **Text Message** - click the **Enable** button if you want to send an SMS text message to them. If enabled complete the following additional items:
        - **Text body** - This is the **SMS Text Message** you want them to see.
3. Click the **Send Message** button at the bottom the the screen.

Topics

These are simply a grouping mechanism for the notifications/messages that are sent out when setting up Rules in **AccuTraining**.

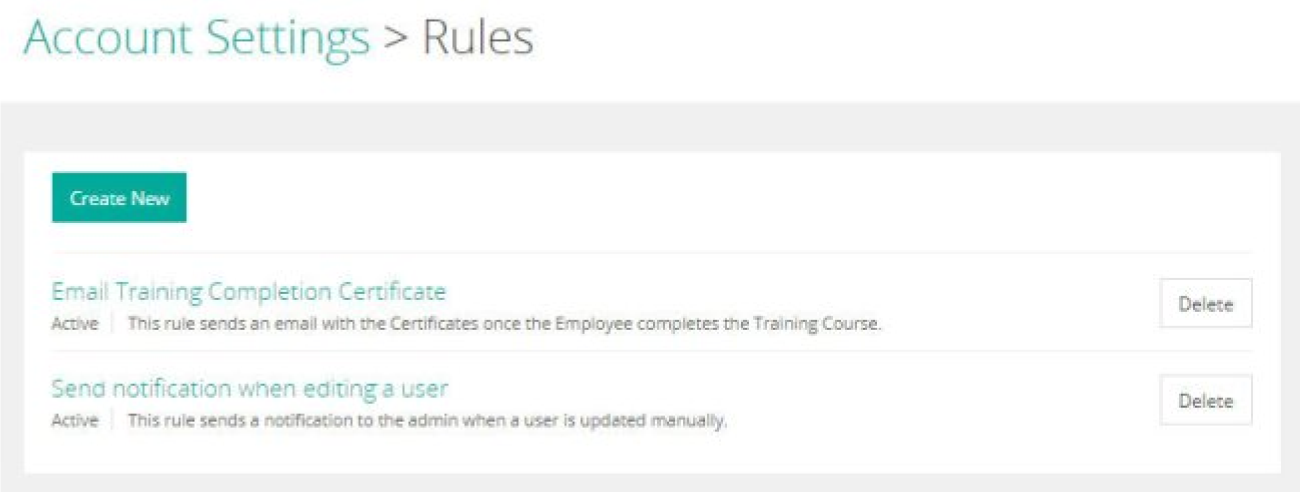
Define Topics

To create a new Topic simply do the following:

1. Click the **Create Topic** button.
2. Complete the following information about the Topic:
    - **General information**
        - **Name** - Use this to give a title to the **Topic**.
        - **Description** (Optional) - Optionally describe why this **Topic** exists.
            - **On-screen delivery** - This **Enabled** option is checked if needed.
            - **Default Action** - Choose to **Send** or **Do Not Send**.
        - **Email delivery** - This **Enabled** option is checked if needed.
            - **Default Action** - Choose to **Send** or **Do Not Send**.
        - **Text message delivery** - This **Enabled** option is checked if needed.
            - **Default Action** - Choose to **Send** or **Do Not Send**.
3. Click the **Save** button at the bottom of this screen.

Rules

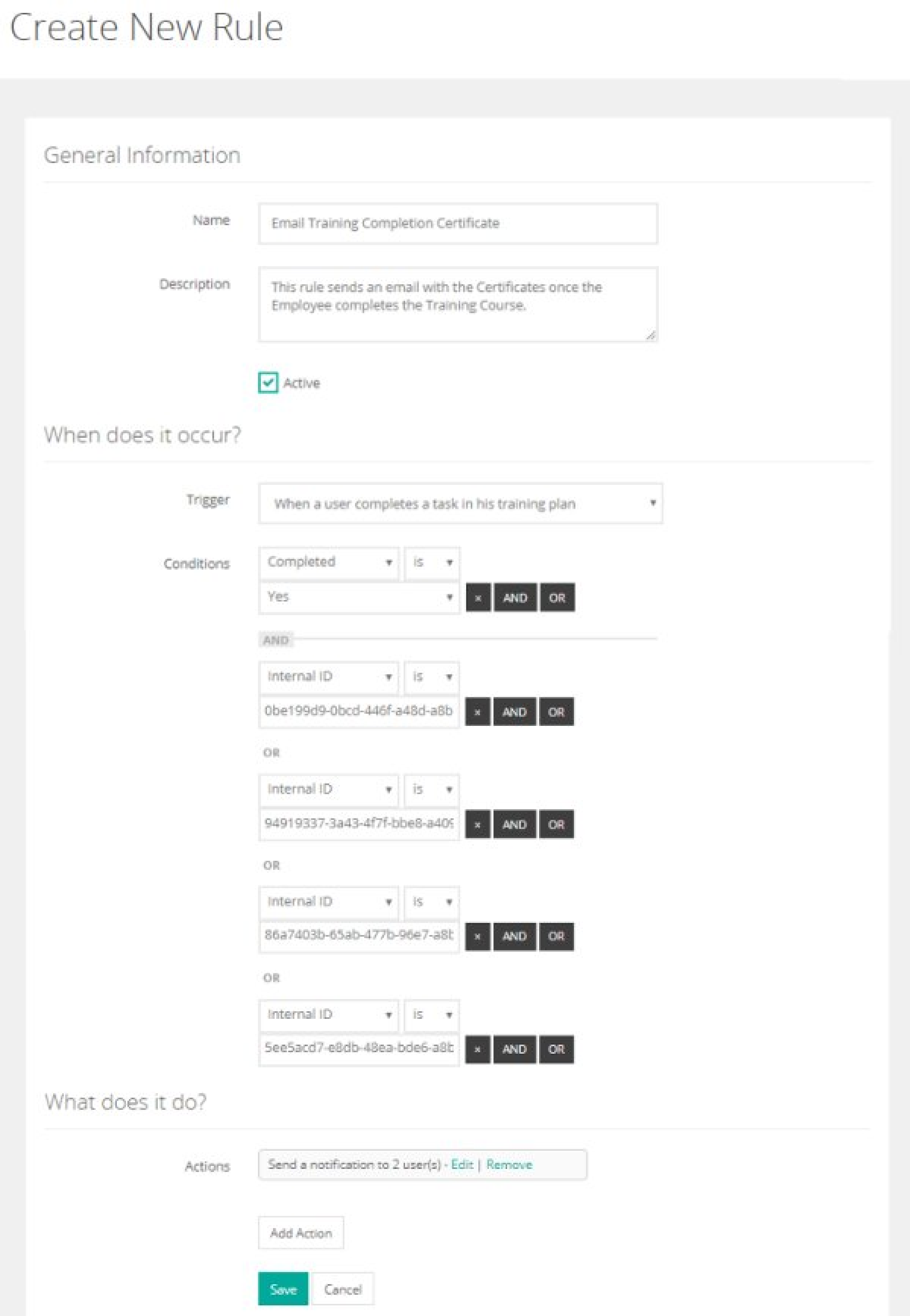
This is a really cool feature that uses a **Rules** engine where you can define events that can do things like sending emails and other system responses based on your requirements. This is recommended only for advanced users.



Create New Rule

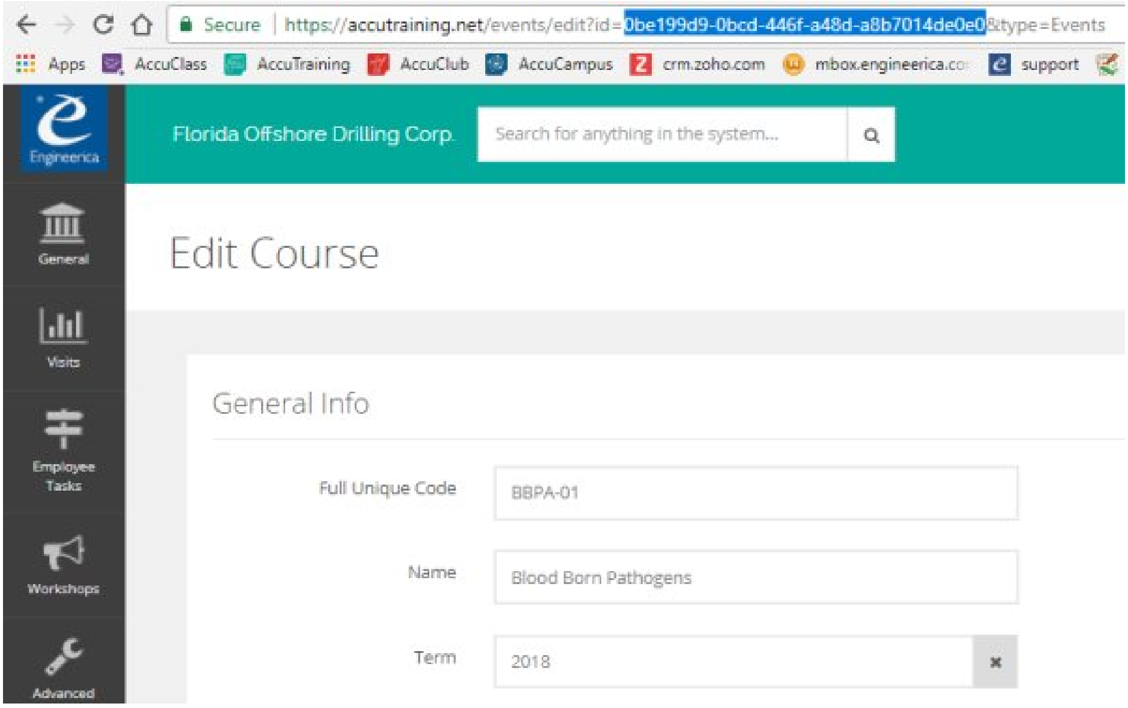
Following these steps will create a new rule:

1. Click the **Create New** button to get started.
2. Fill-out the info:



- Using an **ID** to trigger the rule can be helpful but how do you know what the ID is for each item?
  Here is how you can find that out:
    1. Simply go to the **Employee** list, **Training Course** list, etc. and click the **Title** to edit them.
    2. Once you do you'll see that in the URL at the top of the web browser there is an ID

number displayed that uniquely identifies the entity. See this image as an example:



General Info

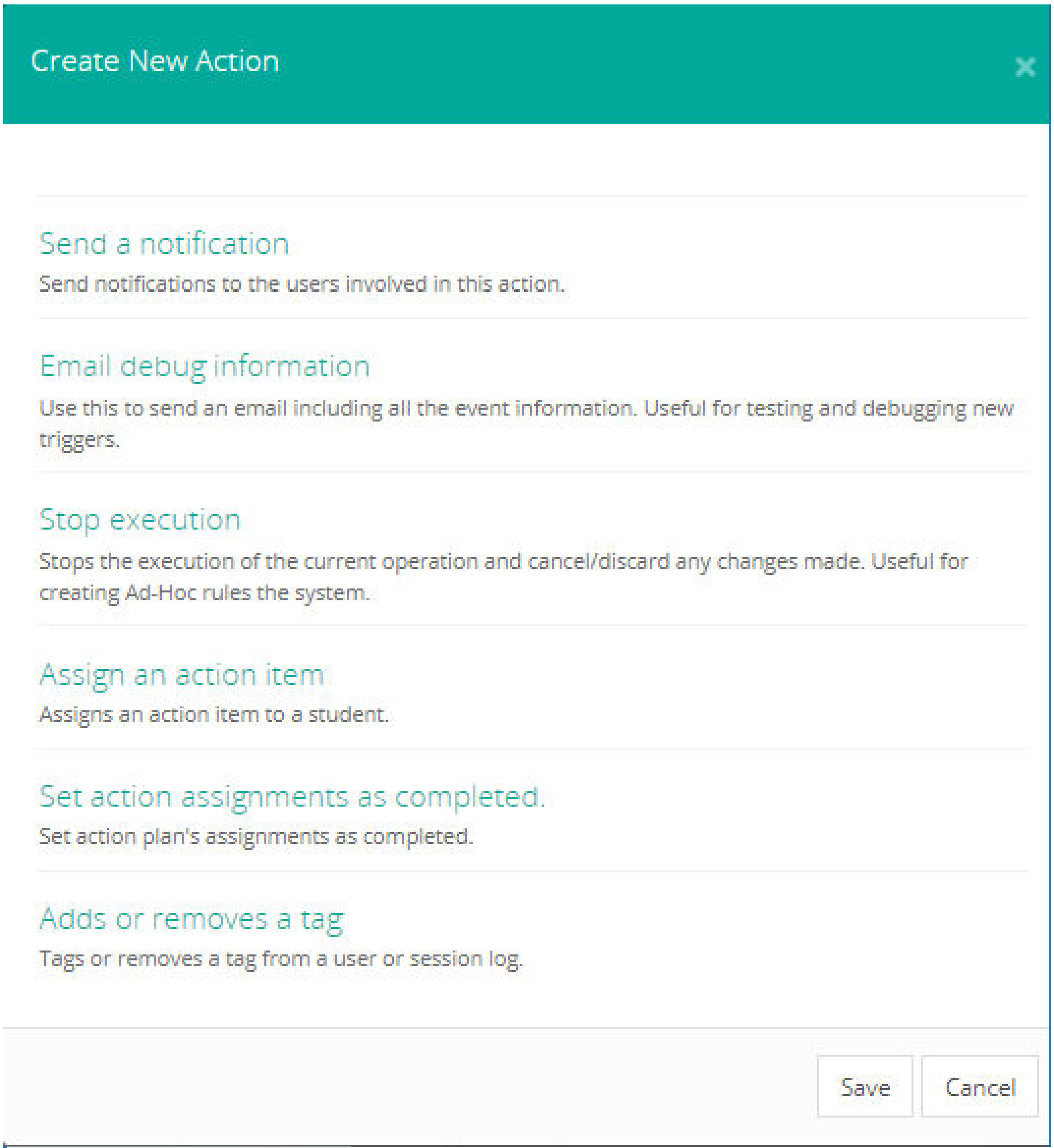
- **Name** - A simple name so you know what rule it is.
- **Description** - A brief description to further explain the rules function.

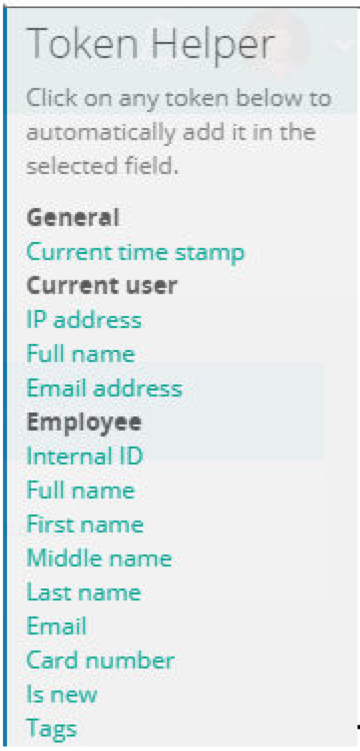
When does it occurs?

- **Trigger** - Set this option so the Rule knows when to run.
- **Conditions** - Set this option from a list of conditions.

What does it do?

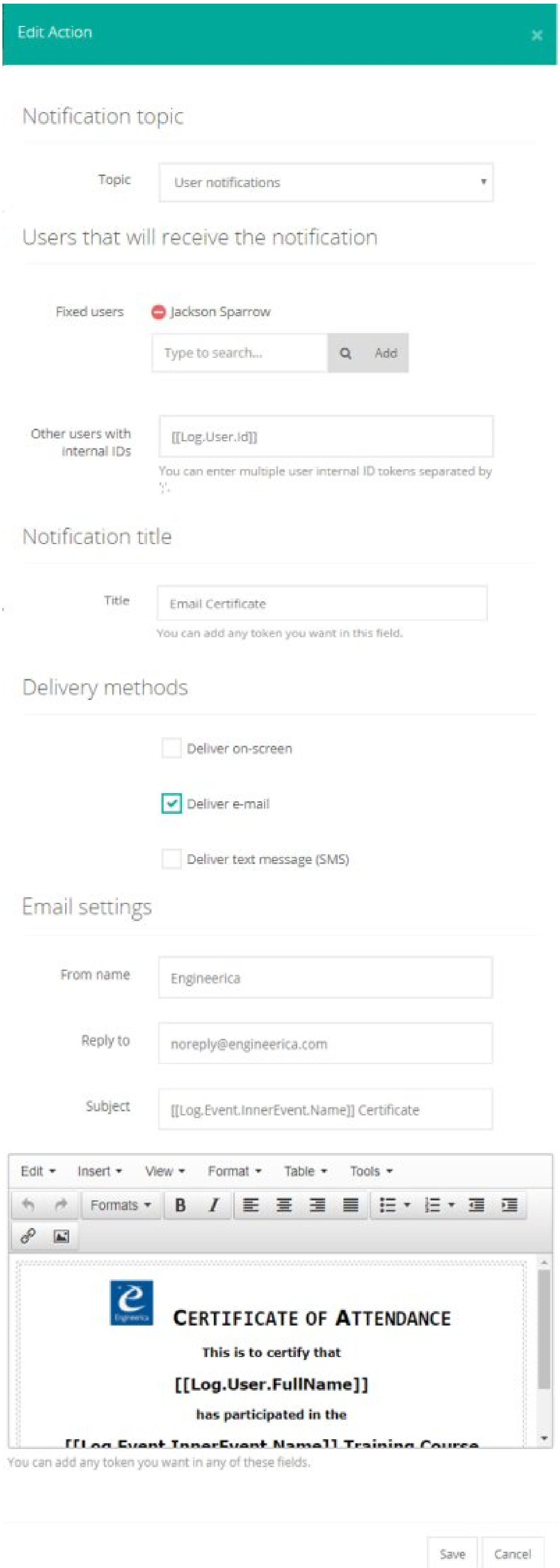
- **Actions** - Add an action to be done once the triggered event occurs.



- 

Token Helper - Use these tokens in the fields and text where needed to add things like the **Employees** name who was being tracked/emailed, the name of the related **Training Course**, **Training Plan**, etc.

- **Example:**


Edit Action
Notification topic
Topic
User notifications
Users that will receive the notification
Fixed users
Jackson Sparrow
Type to search...
Add
Other users with internal IDs
[[Log.User.Id]]
You can enter multiple user internal ID tokens separated by ';'.
Notification title
Title
Email Certificate
You can add any token you want in this field.
Delivery methods
Deliver on-screen
Deliver e-mail
Deliver text message (SMS)
Email settings
From name
Engineerica
Reply to
noreply@engineerica.com
Subject
[[Log.Event.InnerEvent.Name]] Certificate
Edit
Insert
View
Format
Table
Tools
Formats
CERTIFICATE OF ATTENDANCE
This is to certify that
[[Log.User.FullName]]
has participated in the
You can add any token you want in any of these fields.
Save
Cancel

Modify a Rule

Simply click the name of the **Rule** in the list of **Rules** on the **Rules** Screen

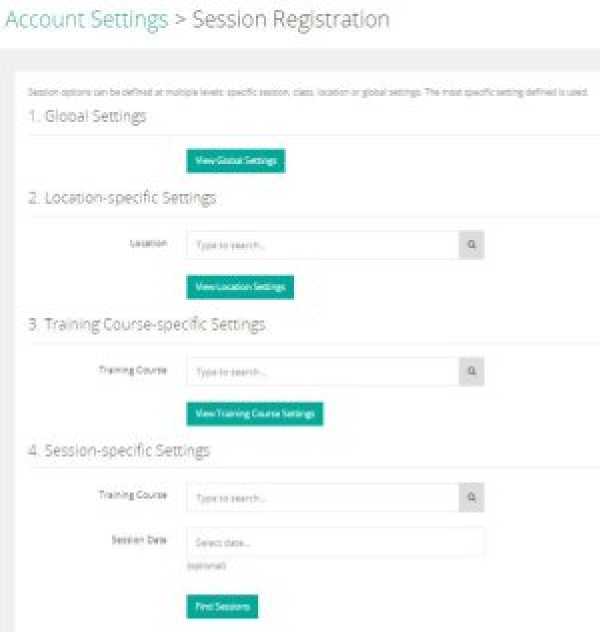
Delete a Rule

Simply click the Delete link on the far right-side of the **Rule** in the list of **Rules** in the **Rules** Screen.

Be careful not to accidentally delete the rules since they are complex to setup. That is why it is recommended you make sure that this is something you are sure of wanting.

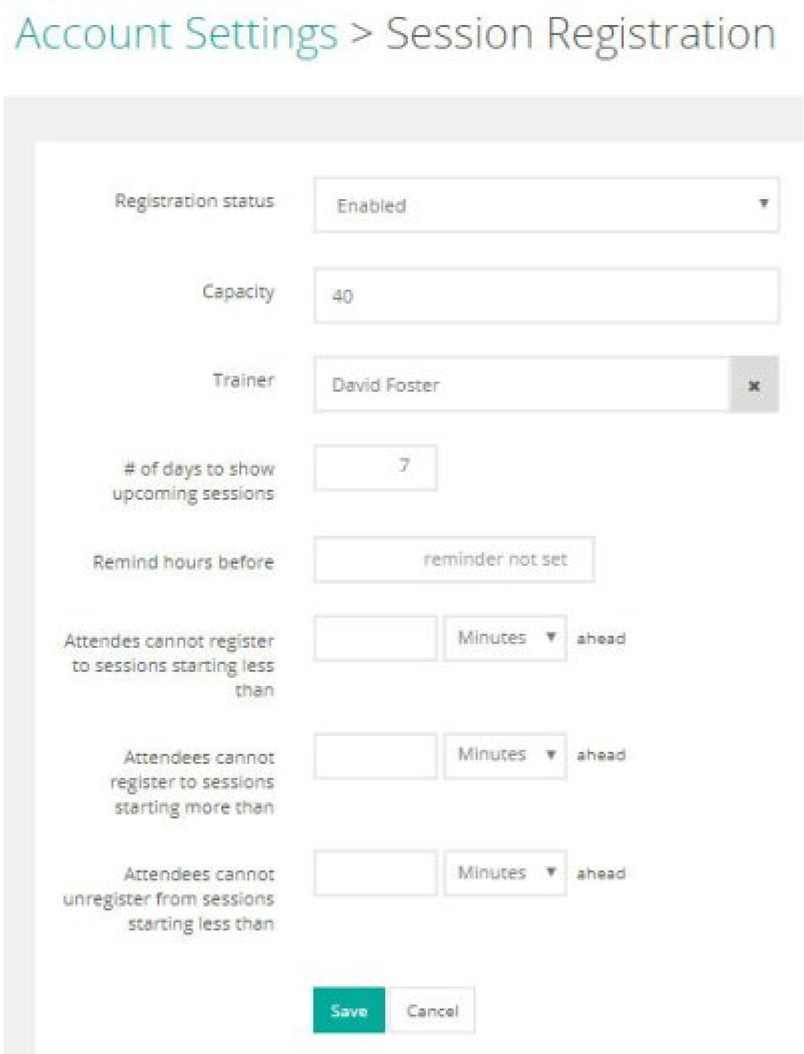
Session Registration Options

Set room capacity, trainer information, and enable session registration. Session options can be defined at multiple levels: specific **Training Course** session, **Training Course** itself, a **Location** or as a **Global Settings**. The most specific settings defined are used.

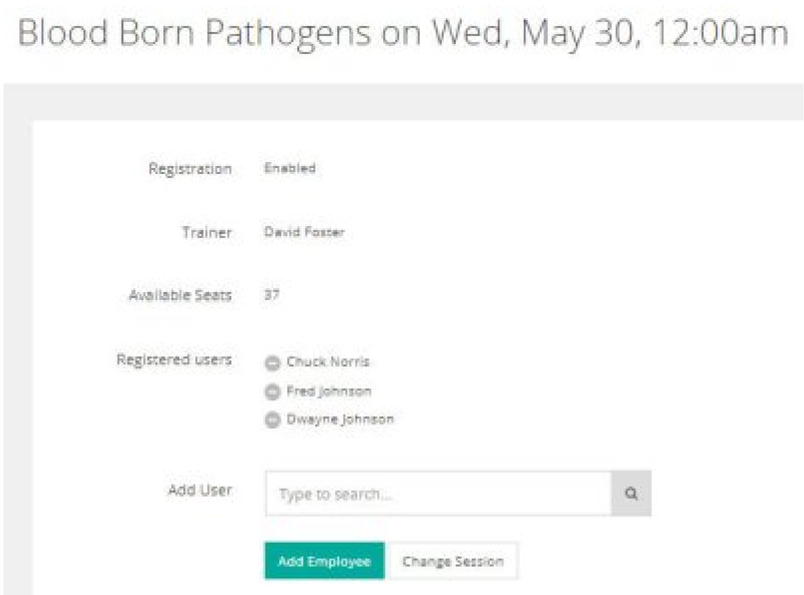


1. **Global Settings** - Use this field to set settings for registration across the account.
2. **Location-specific Settings**
   - **Location** - Use this field to set registration settings based on the chosen **Location**.
3. **Event-specific Settings**
   - **Training Course** - Use this field to set registration settings for a specific **Training Course**.
4. **Session-specific Settings**
   - **Select Course** - Use this field to set registration settings for a specific **Training Course AND**
   - **Session Date (optional)** - Use this field to set registration settings for a specific **Training Course** session.

If you choose any of the above options except the last one you will have to define the **Capacity**, **Training Course**, and enable/disable **Session Registration** similar to the following screenshot:



If you choose the last option you will have to define the **Capacity**, **Training Course**, and enable/disable **Session Registration** just for that particular session similar to the following screenshot:

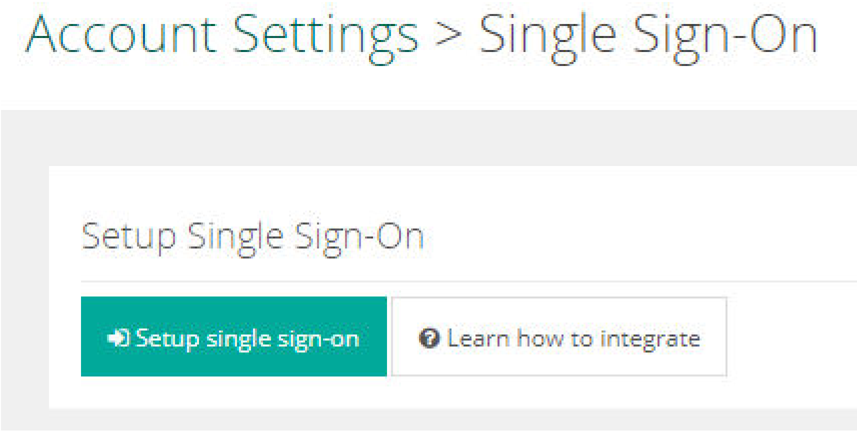


You can also register **Employees** from this screen as well since you are defining the parameters for a specific session of the **Training Course**.

Single Sign-On

This section is where you manage **Single Sign-On (SSO)** settings in your **AccuTraining** account.

Setup Single Sign-On

1. Simply complete the following information after clicking the **Setup Single Sign-On** button.


    - **Access key** - This will be provided for your portal to send over, but you can click the Reset Key button if you believe the key has been compromised so that you can use a new one.
    - **Redirect URL** - This is something like http://www.mycollege.edu/employee_portal_url or wherever you want the **Employees** to be redirected after using the system to register for a **Training Course** session, etc.
    - **Session expires when inactive** - Use this option to log them out and send them back if they take to long to do something in the system.
    - **Enabled** - This enables the SSO option to function. Otherwise outside requests will be ignored.
2. Click the **Save** button when you make any changes to this screen so they'll be applied.


Your Single Sign-On (SSO) access key lets you login as any user without asking for the corresponding password. You must keep your key protected, otherwise your information might be stolen. Reset your key periodically to mitigate information risks.

AccuTraining Single Sign-On Integration

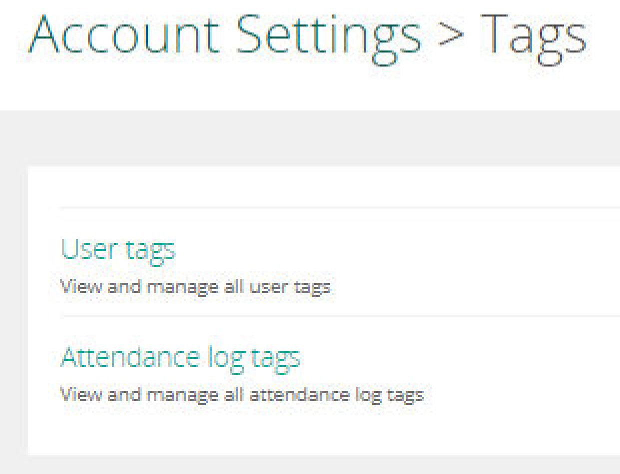
For more information about how this process works please visit this site:
https://accutraining.net/settings/singlesignon/setup

Tags

Create, update and delete the tags in your account.

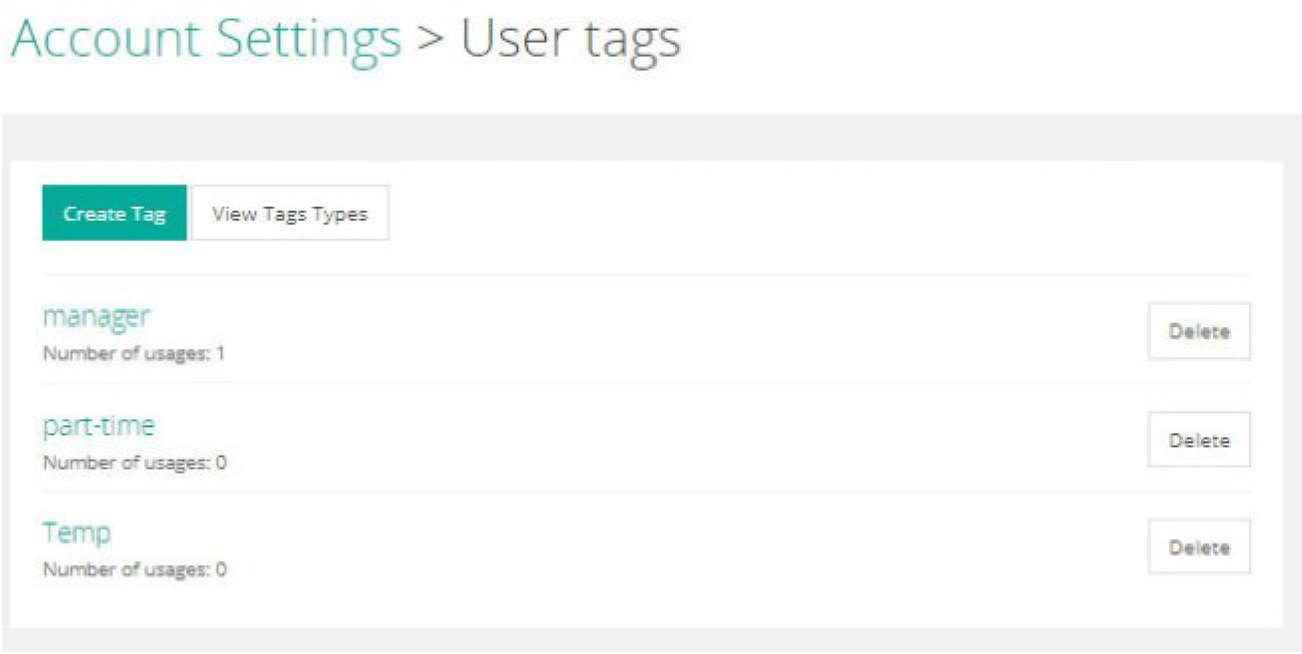
Tag Types

The first screen you see in this section allows you to pick the tag type you want to view/edit. All tags in **AccuTraining** consist of only 1 of 2 options: **User Tags** or **Attendance Logs Tags**.



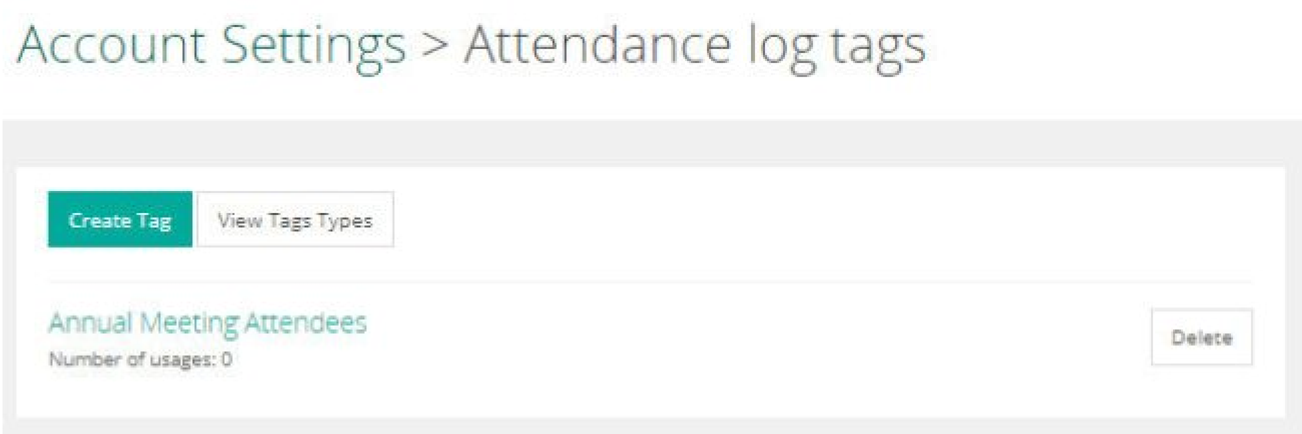
User Tags

User tags get tagged to group a type of user, user trait, etc.



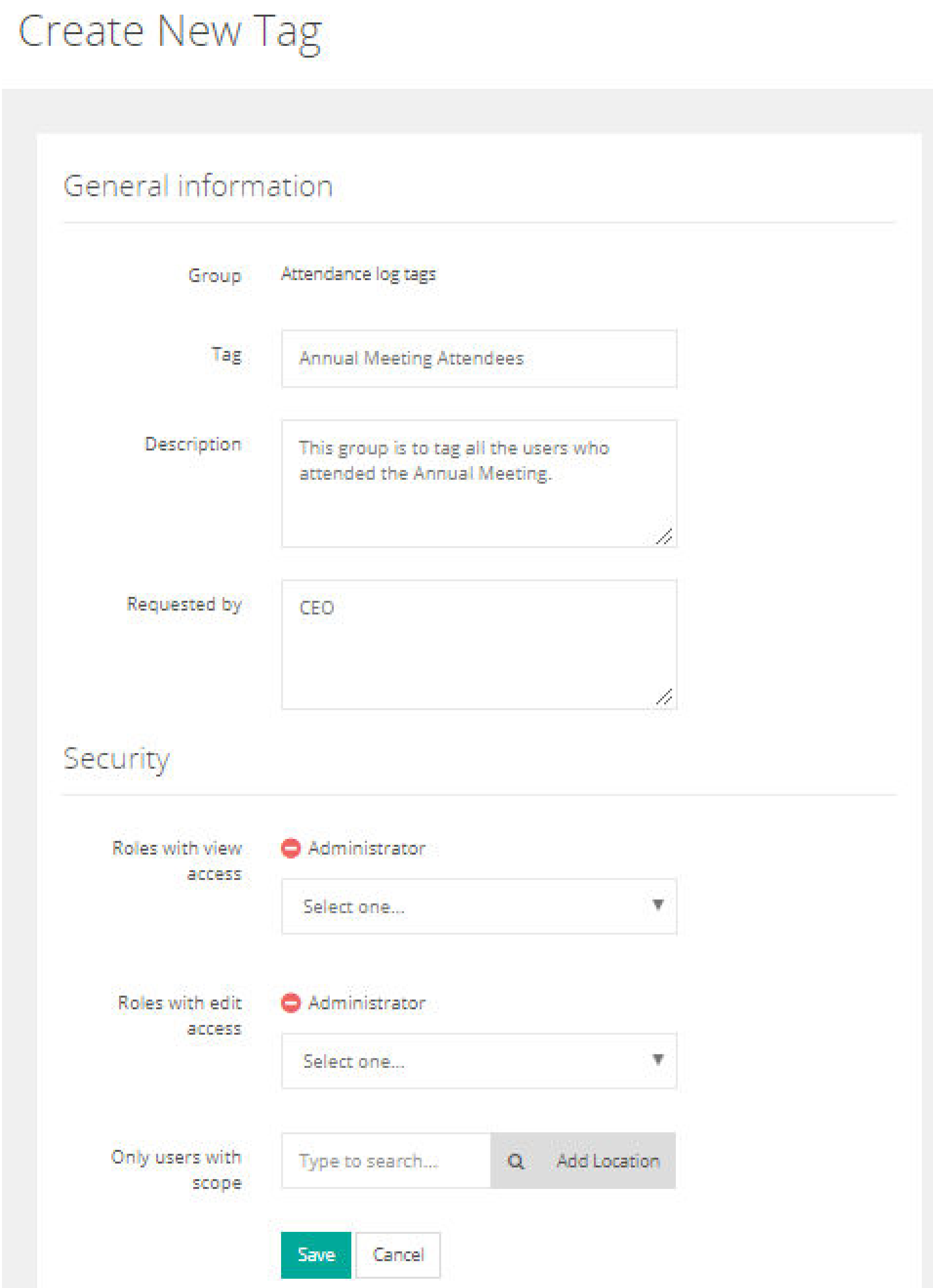
Attendance Log Tags

Attendance Logs Tags are used to tag someone because of a Training Course they attended.



Create a Tag

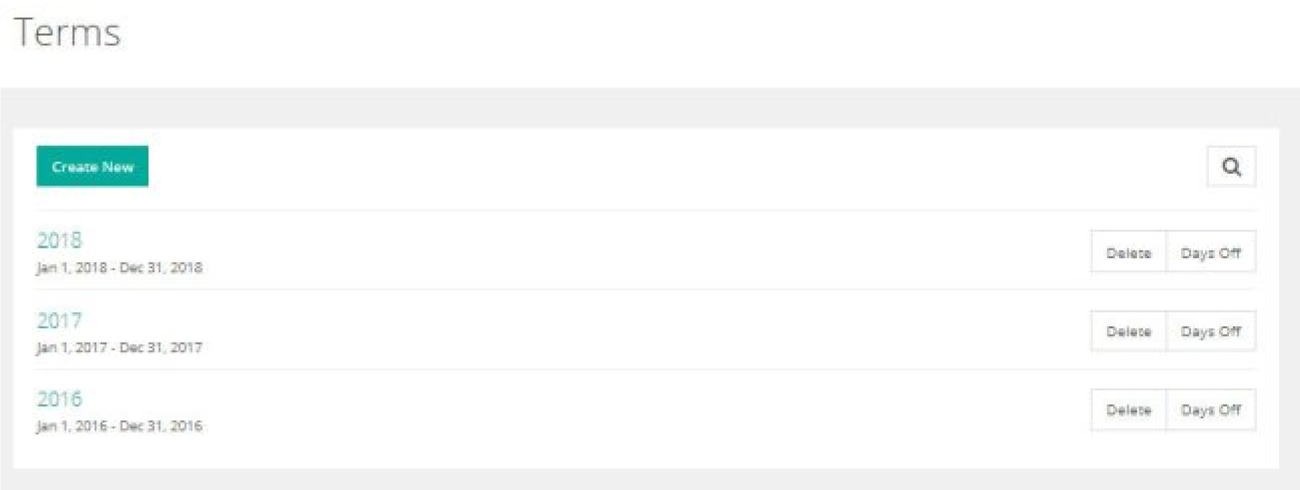
From the corresponding **Tag Type** screen that you want to create choose the **Create New** button to get started. Then complete the following steps:



1. Complete the information about the tag:
    - **General information**
        - **Tag Type** or **Group** will be pre-selected to either User or Attendance log tags
        - **Tag** - This is the name of the tag.
        - **Description** - This a brief explanation of the tag.
        - **Requested by** - This is the person who wanted this tag in the system.
    - **Security**
        - **Roles with view access** - Choose from the **Administrator**, **Operator**, **Employee** or any other **Custom Role** that you want to be able to view this tag/group.
        - **Roles with edit access** - Choose from the **Administrator**, **Operator**, **Employee** or any other **Custom Role** that you want to be able to view this tag/group.
        - **Only users with scope** - Filter the **Users** from the previous 2 options to only those who have access to the specified **Locations** you choose here.
2. Finally click the **Save** button at the bottom of the screen to save the tag.

Terms

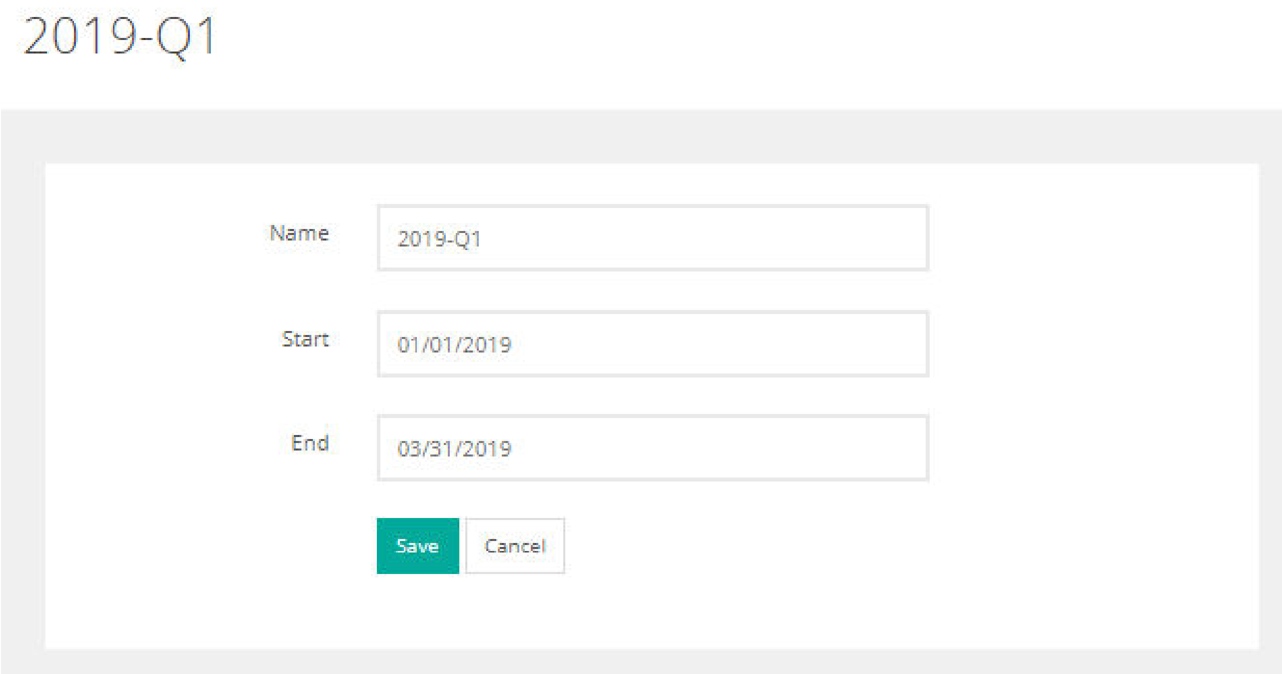
Define the **Terms** when the events will be available and offered. These could be the the timelines they have to complete the **Training Plans** by or when the recurring **Training Courses** stop and start. Typically these are used for easy reporting filters too. Here is an example of annual reporting terms:



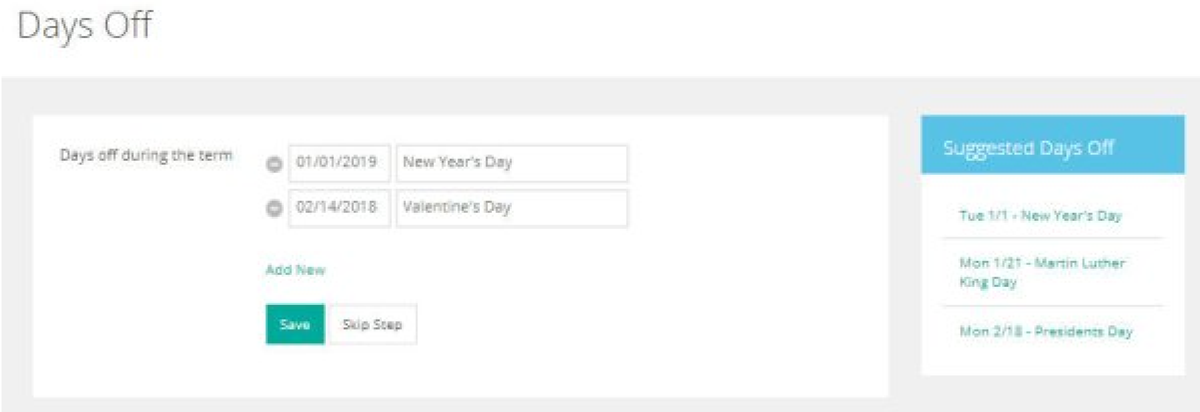
Create New Term

Do the following to create a new **Term**:

1. Click the **Create New** button from the list of **Terms** screen.
2. Now complete the **Name**, **Start Date**, and **End Date**.



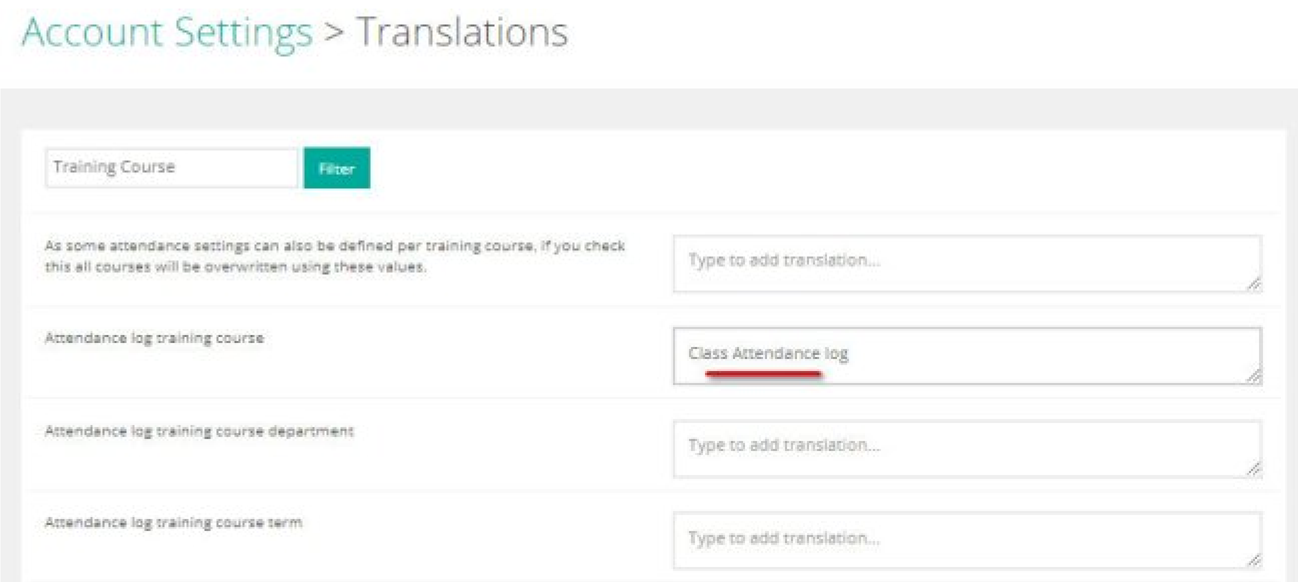
3. Once it is complete you can now add days as **Days Off**. These days will be blocked off the recurring schedules so they are only necessary if you intend on not having **Employees** train on those days. There will be a section that shows U.S. National Holidays that are in a box of **Suggested Days Off**. If you want to add these dates simply click on each of them you want to be added as **Days Off**.



4. Done! Enjoy the **Terms** that you can now assign Training Courses to in the system.

Translations

Translate or change the terminology used in the system. This area is recommended for only advanced users.



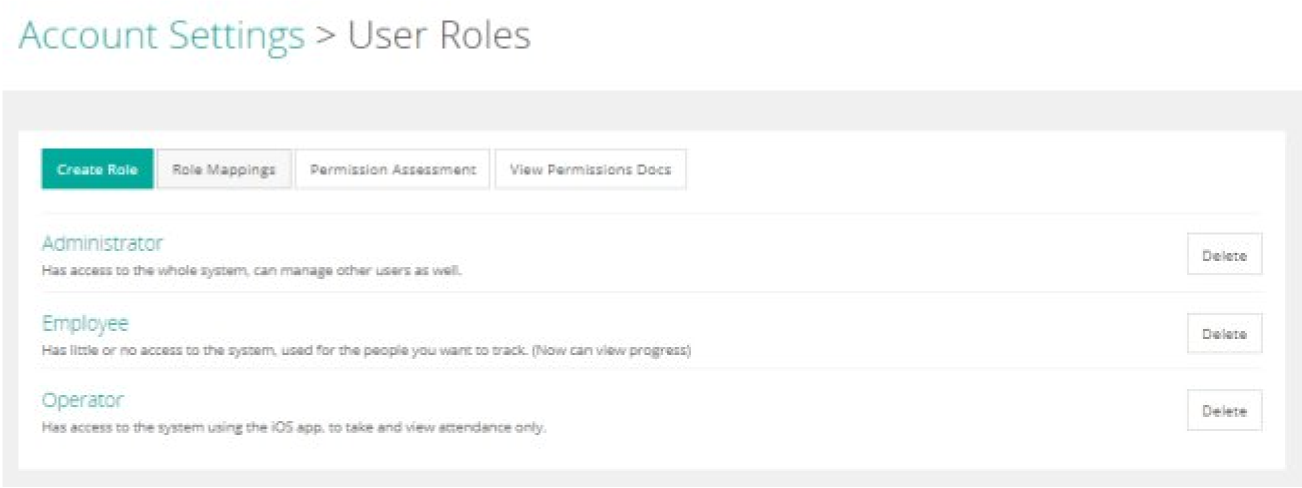
Choose from a list of hundreds of **Terminology** you can translate to your terms that your institution uses and understands. To do this simply do the following:

1. Type in your search keyword(s) you want to replace in the website **Terminology** (top-left corner of the screen) and click the **Filter** button.
2. Now in the results listed simply replace the entire text in the left-hand column with what you want in the textbox in the right-hand column.
3. Done! There's need to save these options to move on.

When you make a change to a certain keyword it will change this throughout the account. This means you'll need to remember the default or original terminology when referencing sections of this manual.

User Roles

Customize the user roles and their permissions.



Default User Roles

There are three distinct default **User Roles** in **AccuTraining** which are **Administrator**, **Operators**, and **Employees**. These default **User Roles** are explained below:

Administrators

Administrators have access to the whole system, can manage other users as well.

You can click on the blue highlighted title of this **User Role** to edit permissions for this role although it is not recommended. If you want to create a lesser **Administrator** role it is recommended that you follow the steps below to create a **Custom User Role**.
Do not delete this User Role! You are a part of this **User Role** so if you want to you can simply edit it by clicking the title. If there are certain areas that you think you may never use then you can remove them by editing this **User Role** but this is only recommended for advanced users.

Operators

Operators have access to the system using the **AccuTraining** Apple app only for taking attendance and possibly viewing attendance.

You can click on the blue highlighted title of this **User Role** to edit permissions for this role.
It is recommended that to you edit this **User Role** rather than delete it. Simply by clicking the title you can edit this **User Role**. If there are certain areas that you think these users may never use then you can remove them or you can give them more access to items they need but this is only recommended for advanced users.

Employees

Employees have little or no access to the system, used as the group of people you want to track.

You can click on the blue highlighted title of this **User Role** to edit permissions for this role.
It is recommended that to you edit this **User Role** rather than delete it. Simply by clicking the title you can edit this **User Role**. If there are certain areas that you think these users may never use then

you can remove them or you can give them more access to items they need but this is only recommended for advanced users.

Custom User Roles

Custom User Roles are roles that you can make to give special permissions to a group of people that you want to make have more permissions than an **Employee** but less than an **Operator** or even more permissions than an **Operator** but less than an **Administrator**. Basically you are able to set the amount or level of permissions that the **Custom User Role** should have.

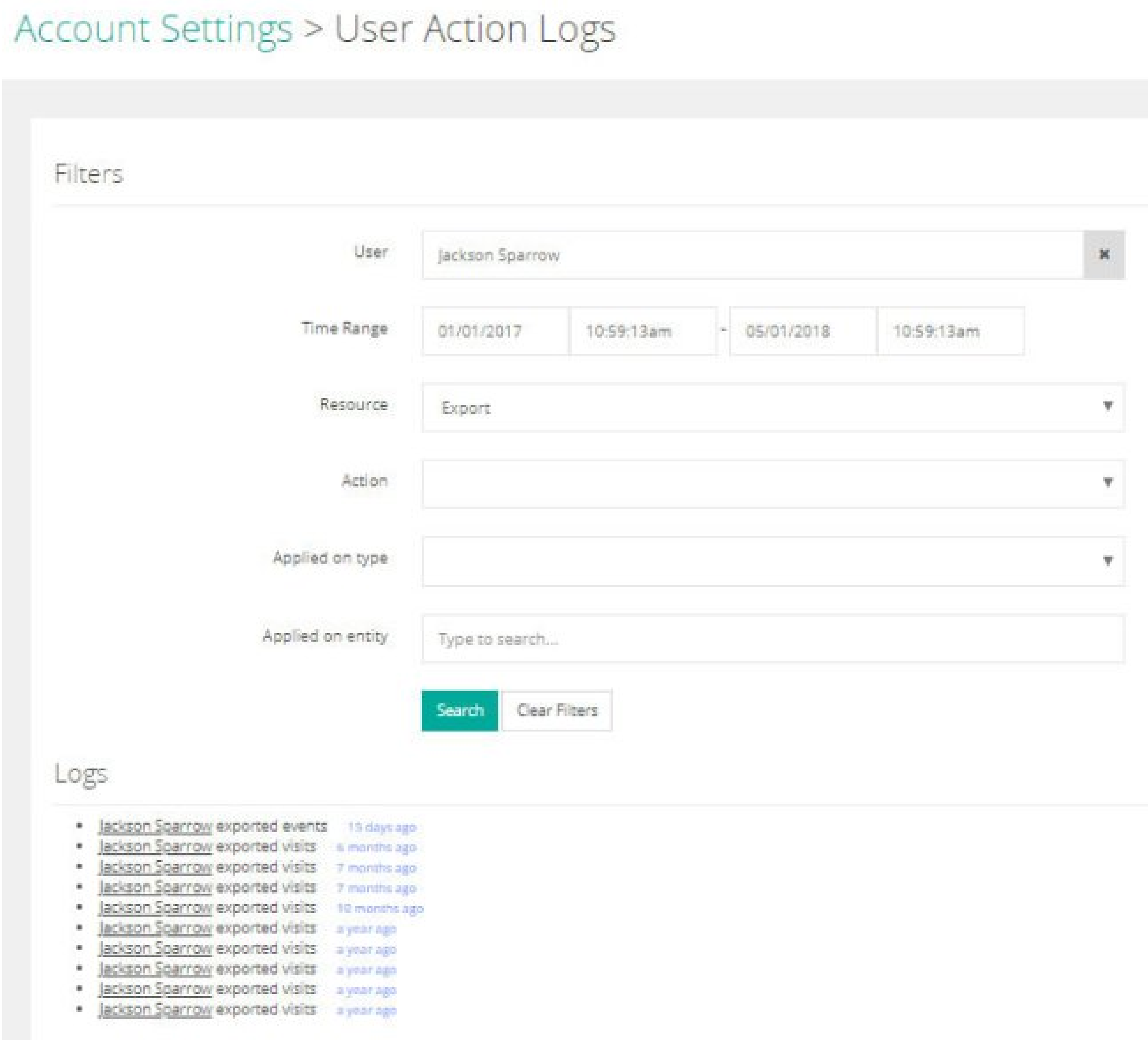
Create a Custom User Role

Custom User Roles are a great way to define your own types of **Users**. They can be or do anything you define for them. If there is a default **User Role** such as **Administrators**, **Operators**, or **Employees** you want to base them off of you can do this too. **At the moment this is only recommended for advanced users**. To get started do the following:

1. Click the **Create Role** button on the **User Roles** screen.
2. Fill-in the **General Info**:
   - **Name** - The name of the User Role you are creating and that you will see when assigning it to **Users**.
   - **Description** - This field helps to describe the User Role for someone not sure on if they should assign the **User** the **Custom User Role**.
3. Now set the **Define Policy** by clicking either the **Select from Template** or **Advanced Editor** button:
   - **Select from Template** - This option allows you to start off by using one of the default **User Roles** and modifying it.
   - **Advanced Editor** - This option allows you to define a completely new policy from scratch.
4. Finally be sure to click the **Save** button at the bottom of the screen.

View Audits

Use this section to view the actions performed by any of the users in case you need to know who needs coaching about the changes they are making in the system and their impacts.



This search can be very helpful when determining what your other users/admins are changing in the system so that you know who has been changing settings, etc. Choose to search using the following options on this form:

- **User** - Use this option to run an audit on a particular **Employee's/User's** actions.
- **Time Range** - Use this option to narrow the audit down to a specific time-period.
- **Resource** - Use this option to limit the search to a particular module in **AccuTraining**.
- **Action** - Use this option to further limit the search to a particular action for the chosen **Resource** above.
- **Applied on type** - Typically is pre-selected based on the **Resource** set above but this is referring to the type of **Resource** that would be affected by the changes above to the above **Resource**.
- **Applied on entity** - Typically this is left blank but this is referring to the specific **Resource** name that would be affected by the changes to the above **Resource**.

This resource is recommended to be used by advanced users only. The reason for this recommendation is not because you can make changes or cause any issues, but rather that creating the queries may prove difficult for users not familiar with **AccuTraining**.

Previous: Workshops | **Table of Contents** | **~Back to Top~**| **Next: Tracking Attendance**