Attendance tracking made easy

Accudemia

Web-Based Center Management Software

Engineerica

www.engineerica.com

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Setting up Accudemia for your Center

Setting up your Time Zone

In this step you will set up the time zone to the one you use. Doing so, the system will record the correct date and time when students sign in.

In order to set the correct Time Zone, do the following:

1. Click the **Control Panel**, under **Administration** in the menu on your left.
2. Click the **Localization Options**.
3. Select your time zone in the **Time Zone** option.
4. Click the **Save Changes** button.

Setting up the ID format

Choose your correct Id number mask to your College. By default, Accudemia sets the social security number format (999-99-9999).

To set your **User ID Mask** correctly, please follow these steps:

1. Go to **Administration**, select **Control Panel** and then click **User Accounts**.
2. Set the correct User ID Mask at **Account Information**.

NOTE: Learn more in the ***Website Settings*** section.

Setting up your centers

In this step you have to create places where appointments, advising, counseling or other student services are set.

1. Go to **Administration**, select **Centers & Classrooms**, then click **Create New**
2. Select the center option at **Type** drop list.
3. Name the Center. Also, you can add a description if it's needed.
4. Add a service at **Services** tab.
    - Click the **Add Service** button.
    - Name the service and **Accept**.
5. Click the **Save Changes** button.

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Setting up semester dates

This step is highly important to add subjects and classes. In order to create the semester/term, do the following:

1. Go to **Administration**, select **Terms**
2. Click the **Create New** button
3. Name The Semester/Term at **Name**.
4. Select Start date time and End Date Time of the Semester/Term.
5. Click the **Save Changes** button.

Entering College Off-times

This step is to define Time-frames when your college is closed and tutors are not allowed to be schedule as working. You can define a regular weekly college schedule or exceptions such as school and public holidays. Also, you can define Center's Off-times. These Off-times will be added to general College off-times.

In Ordering to enter the College Off-times:

1. Go to **Administration**, select **Off-times**.
2. Select the **Place**.
3. Select the **Edit Mode** option. To set a general Off-time, it's encouraged to set your Off-times as Term mode.
    1. **Merged Mode**, as default.
    2. **Term mode**.
    3. **Exceptions Only**.
4. Select **Term**. If you have only one, this will be used as default.
5. Click **Apply** to display college's schedule.
6. Drag and drop the mouse for selecting blocks in order to set your Off-times.
7. Wait for the **Event Information** pop up window.
8. Select at **Schedule as** Off-time. You will be able to set a Description or a Comment to it.
9. Click **Save**.

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Entering your college news

This step is used to inform the users about news in the college and center places. An example of relevant College/Center announcements could be showing the opening times. To create your College News, do the following:

1. Go to **Administration**, select **Control Panel**, and click **Announcements**.
2. Select where **View those applied to** at **Settings Scope** pop up window.
3. Write your News at the Text Box.
4. Click the **Save Changes** button.

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Using the Accudemia Interface

The Main Menu

At the left of the Homepage displays three main sections:

1. **Administration**: Displays Administrator items that can be modified by the administrator only.
    - **User Accounts**: To add and modify students, tutors, instructors, staff, system users and groups.
    - **Sign in Stations**: To define a location's sign in stations
    - **Subject Areas**: To list subject areas so they can be edited, deleted or added.
    - **Surveys**: To define the survey and its questions used to collect feedback.
    - **Off-times**: To enter time periods during which tutors are not allowed to be scheduled as available.
    - **Centers & Classrooms**: To create and edit centers, classrooms and location groups.
    - **Terms**: To define term/semester for your college.
    - **Reports**: Depending on the Report Type, you have different filter options to choose from. The Period Filter gives you the possibility to filter information for a certain amount of time: “Today”, “Last week”, “Last month”, “per Semester”, or “As entered” in the calendar.
    - **Advanced**: To define advanced settings to define role group, referral templates and importing.
        - Role Group Templates
        - Referral Templates
        - Developers
        - Import
        - Export
    - **Control Panel**: Define configuration options for the entire college and for each location (College-Level and Center-Level).
2. **Center Attendance**: Displays center items to edit, see and set appointments, session logs, tutor schedules and others.
    - **Who's In**: To check who is signed in.
    - **Daily Viewer**: This page displays daily Tutors Schedule. It shows the current day and the first center listed at Centers & Classrooms page as default.
    - **Sign In/ Sign Out**: To manually add sign in sessions for students.
    - **Session Logs**: To enter comments on sign-in sessions or to modify session records.
    - **Appointments**: This module schedules appointments between a student and a tutor. Options such as Edit, Cancel, Avoid, and Re-Schedule help you manage your records easily.
    - **Tutors Schedule**: Edit Tutor's availability.
    - **Intake System**: To manage when people can get into the session.
    - **Reports**: Displays Reports related to Center Attendance.
3. **Class Attendance**: Displays all items related to classes.
    - **Attendance**: To edit the current classes attendance.

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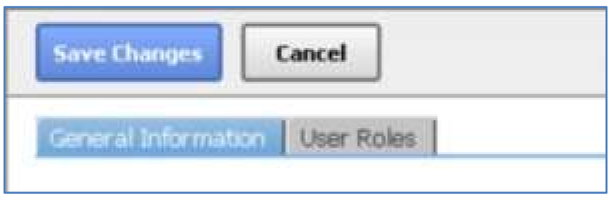
- **Referrals**: To increase student retention by identifying at-risk students and helping them before it is too late.
- **Reports**: Displays Reports related to Class Attendance.

Adding and Saving items

Most pages have a tool bar on the top, which allows you to perform the most common tasks related with the content you are viewing.

The following image shows a tool bar to save your last changes in your accounts, settings and items.



This other image sample of a tool bar to create, edit and delete surveys.

Sorting and Searching in Tables

Filtering

To filter your data use the magnifying glass that is next to the grid headers, click it and type to filter the data. To learn how to do so, check the following image.

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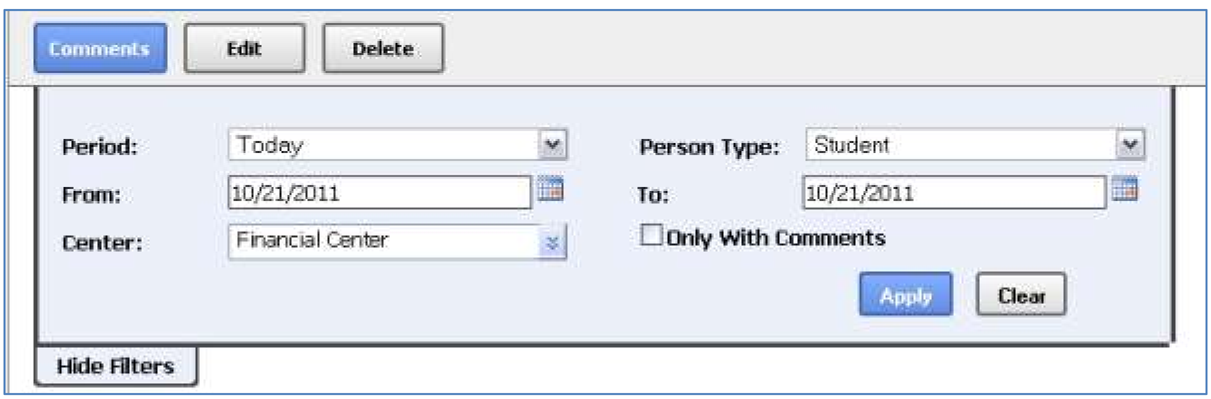
User ID	wr	Gender	Birthdate	Active	Roles
692-15-9772	Wright, Griselda				
000-78-8545	Wright, Harry L				
000-58-1255	Wright, James				
000-62-1265	Wright, Jamie				
000-04-9703	Wright, Mary Kathleen				
653-43-9949	Wright, Michelle				
000-00-2928	Wright, Nikki Jo				
432-37-3575	Wrinkle, Naomi				
909-87-7462	Wristen, Saumon				
655-14-8588	Wrona, Katy				
778-88-2289	Wrona, Lois				
Showing 1-11 of 11					1

Another option to filter your data is using the **Show Filter** button that appears below the toolbar in some pages. You can select the filters you want by using the controls displayed in the box that opens up. Once you are done setting the filtering options you like, click **Apply** to update the results. The picture below shows an example taken from the Session Logs page:

- Click Show Filter, below the toolbar:
- And then select the options you want to filter by:



- After selecting your options click Apply, and the data that matches your criteria will be displayed.

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Display Details

In some pages, when you click a record, a Details button will appear on the right of the grid. Clicking on it will open a space containing some additional information that might be useful. This is intended to provide a quicker access to most important data without having to click Edit to view the full details.

For example, if you are looking at the User Accounts, by using the Details button you can quickly get the email, the address, the phone number, and so on.

Sort

To sort information in a table, just click the name of the field (the header of the table). By doing so, the data will be sorted in ascending order; clicking again will sort the data again in descending order.

Please note that not all headers support these feature.

Export

To export your information, click Export and then Excel. It will export the data to an Excel file.

See the session log capture below:

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NOTE: The export is limited up to 1000 records due to performance reasons. In order to export all the information, please use the Export feature located under Advanced in the left menu.

Multiple Selection

You can enable multiple selection by clicking on **Multi-select**, and then on Enable or Disable. This option allows you to select multiple records, and perform many tasks faster.

Customizing Recorded Information

Go to Control Panel to set up college settings and locations settings. Use the tracking settings configuration displayed to edit what data Accudemia is going to collect:

- **General**: Set Calendar configurations, Maximum sign in duration, Sign in Stations options.
- **Walk-Ins**: Set how a tutor is displayed at the activity tracking screen to students, when they sign in with a tutor without previous appointment.
- **Appointments**: Set the range of time to allow an appointment to be created. This Screen displays options to allow creating an appointment, the maximum hours per week, duration restrictions, and range of time to take the appointment as valid, available days to create the appointment, notifications and subjects and services by default.
- **Class Attendance**: Set the tardy and cut-off tolerances of classes. Set how to resolve with unresolved sign-ins and customize schedule classes.

Setting up your Sign-in Stations

To set a Sign-in Station for a Classroom or Center simply create a new sign in station by following these steps:

1. Access through **Administration** > **Sign-in Stations**
2. Click the “Make me a Sign-in Station” button.
3. Enter the Name of the new Sign-in Station.
4. (Optional) Enter a description of the Sign-in Station.
5. Choose the Location for which you want to create the Sign-in Station.
6. Click the “Save Changes” button.

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Generating Reports

Depending on the Report Type, you have different filter options to choose from. The Period Filter gives you the possibility to filter information for a certain amount of time: “Today”, “Last week”, “Last month”, per “Semester” or “As entered” in the calendar. There are three main sections of Reports.

Administrative Reports:
Reports that an administrator would want such as Subjects, Student Lists, and more.

Center Attendance Reports:
Reports related to Appointments and Walk-ins in the Centers.

Class Attendance Reports:
Reports related to Classes Attendance in Classrooms.

When you have selected all the required filter data you can choose from the following formats: PDF, Excel or Web Archive (HTML).

Importing your College data

Use ADX (Accudemia Data eXchange) to upload your college database. Use CSV samples to import your data that are available online:

Accudemia Data eXchange - ADX or download the Full Reference Manual

To download ADX in Accudemia go to **Administration** > **Advanced** > **Import**.

Analyzing Demographics Data

Setting up Student Profile Questions

Go to **Administration** > **Control Panel** > **Profile Questionnaire**

Editing the Profile Questionnaire

1. Enter the title, for example "Profile Questionnaire"
2. Enter the description, for example "Personal Information".
3. Enter a question.
4. Change the appearance of the question with the tool bar.
5. Check the "required" box if the question is required.
6. Choose the answer type. Select between Multiple Choice (select if it allows multiple responses) or Text answers.
7. Enter the answer options.
8. Enter the next question or click the "Save Changes" button.
9. Use the Preview option to verify the profile questionnaire.

Allowing students to update their profile data

Students can update their profile data. Edit it at My profile. Then click **Profile** tab.

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Generating Profile Reports

To generate a report with the user's profile: Use **Hide Deleted Questions and Answers** check box to hide deleted questions.

There are two important reports:

- **Student Profile**: This report shows each demographics question that the system tracks. For each question, the report lists the available answers. For each answer, the report shows number of students, their number of visits, and total sign-in time of students who selected that answer.

- **Users Detailed Profile**: This report shows each demographics question detailed that the system tracks.

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Customizing Accudemia

Organizing the Homepage

Customize your College's News in your Homepage. **Go to**:
Administration > **Control Panel** > **Announcements**

To set a College Announcement that will be shown to all users in that College.

Use the Gadgets provided by Accudemia to add to your Homepage screen shortcuts as My Appointments, My Pending Surveys. Also, keep update to the last World News using customizable News Gadgets as BCC NEW HEADLINES. Some of them can be edited by users.

Google Gadgets added to Accudemia

The following gadgets are content in Academia at Add Content section.

- **College News**: Shows the college and centers announcements.
- **Upcoming Appointments**: Reminders for upcoming appointments.
- **Accudemia Inbox**: Displays your Accudemia message inbox.
- **My Pending Surveys**: Answer surveys and give feedback.
- **CNN Headlines**: Streams the latest news from CNN.
- **BBC Headlines**: Streams the latest news from BBC.
- **Washington Post Headlines**: Streams the latest news from The Washington Post.
- **Accudemia Blog News**: Get the latest tips and tricks from the official Accudemia Blog.
- **Google Calendar**: Access to your Google Calendar from your homepage.
- **Shared Calendar by Google**: Access a shared Google Calendar from your homepage.
- **Tasks**: Manage your to-do list, provided by Google Gadgets.
- **Remember The Milk**: Reminders provided by Remember The Milk.
- **Local Time**: Get the local date and time right here.
- **Driving Directions**: Get driving directions using Google Maps.
- **Box.net File Manager**: Manage your files and folders stored in you Box.net account.
- **Facebook**: View your Facebook news feed and update your status.
- **Google Talk**: See your contacts and send instant messages using Google Talk.

Adding Google Gadgets

What is a Google Gadget?

Gadgets powered by Google are miniature objects made by Google users like you that offer cool and dynamic content placed on Accudemia.

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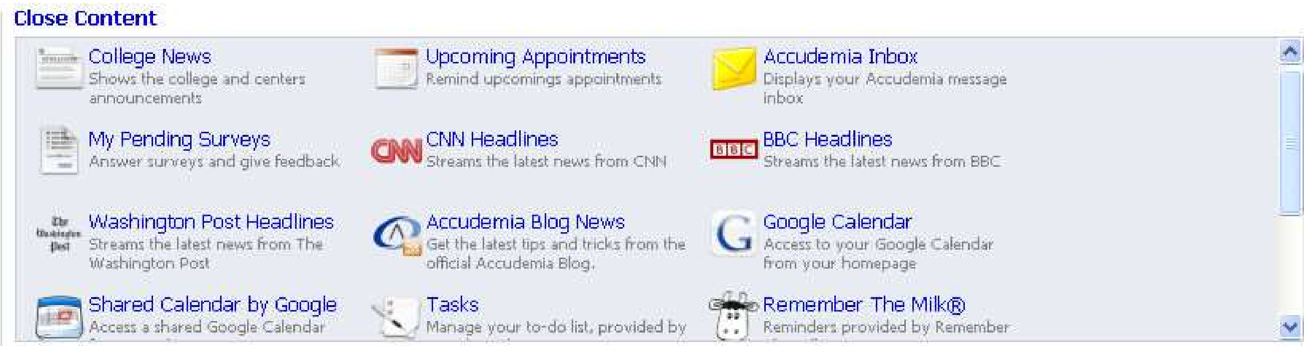
How to add Gadgets to my Homepage

Go to **Add Content** and it will display different gadgets that you can add. Click one of them, automatically. Some of them can be edited by user. The following image shows a College's Homepage:



Google Shared Calendar

This gadget allows users to view the college shared calendar right on their Home Page. In order to add the gadget, users just need to click Add Content and select the Google Shared Calendar. Automatically it will display the calendar.

How do I set up using my own Google Calendar?

The first thing you have to do is enable calendar sharing on your Google Account, and get the calendar ID of the calendar you want. You can do it by seeing the calendar settings.

Then, copy your Calendar ID and paste it on Accudemia. Then go to:
Control Panel > **Announcements** > **Google Shared Calendar ID**

Controlling notifications

My settings: This page lets to users set when Accudemia should send you e-mails and SMS. All Items are selected by default. The following image shows the checked settings that user must select to get or not get notifications from Accudemia.

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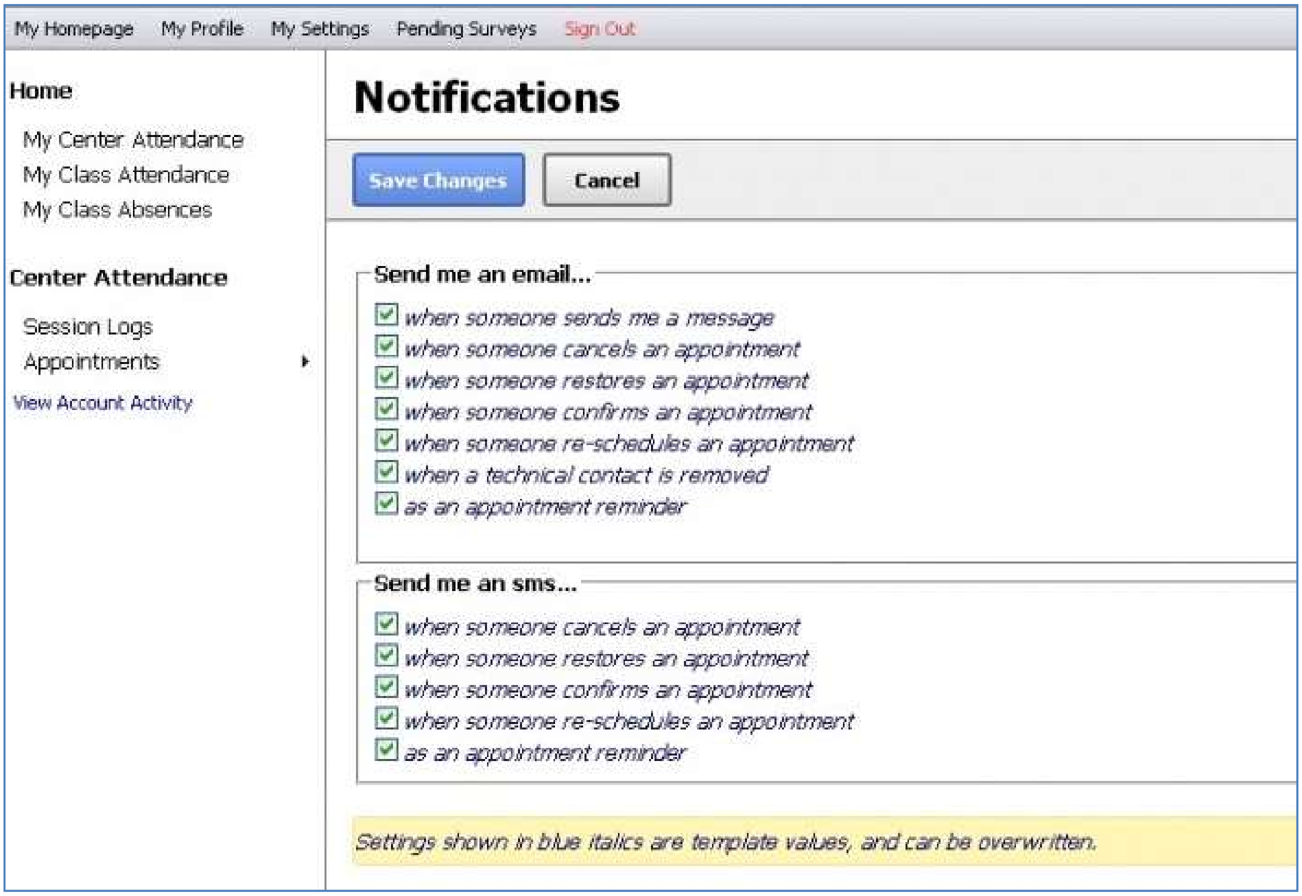

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Entering Session Log

Setting up Session Log Options

Go to **Administration** > **Control Panel** > **User Accounts** > **Access Restrictions** to restrict some options to tutors and students.

Session Settings:

- Students can have access to sessions log screen.
- Tutors can view all sessions.
- Tutors can edit their own session comments.
- Max hours for tutors to edit session comments.

Entering the Session Log

Go to **Center Attendance** > **Session Logs** to enter comments on sign-in sessions or to modify session records. Use filter to display your required session logs.

To edit a session log:

1. Select the Session Log.
2. Click the **Edit** button.
3. Edit the Date, Time, Subject, Tutor, Instructor and Services.
4. Click **Save**.

To add comments

1. Select the Session Log.
2. Click **Comments**.
3. Complete the pop up box with comments of the log.
4. Click Save.

Generating the Session Log Report

Go to **Center Attendance** > **Reports** > **Session Comments** to display comments entered on sign-in sessions via the “Session Log” screen.

After filter your information click **View Report** to display the report.

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Scheduling Appointments

Setting up Appointment Options

Go to **Administration** > **Control Panel** > **Appointment** to set your options.

Scope the location to set your appointments options. Important Areas Displayed to change your default settings:

- **Appointments Restrictions:** To set range of time to schedule appointments.
- **New Appointments:** To set subjects and services by default.
- **Email and SMS notifications:** Enables users to receive confirmations and reminders via emails.

Entering Staff Schedule

To enter the Staff Schedule it can be done by you as an Administrator, or it can be edited by the staff/tutor themselves.

Go to **Center Attendance** > **Tutor Schedule** to edit Tutor Schedule.

To edit as an Administrator:

1. Select the location at **Center**
2. Type and select the **Tutor**
3. Select your **Edit mode**. The calendar will be displayed depending on what you have selected.
4. Click **Apply** to display the calendar.
5. To edit it drag and drop the mouse for selecting blocks in order to edit the availability.

To edit as a Tutor:

1. Click **My Schedule**
2. Select the location at **Center**
3. Select your **Edit mode**. The calendar will be displayed depending on what you have selected.
4. Click **Apply** to display the calendar.
5. To edit it drag and drop the mouse for selecting blocks in order to edit the availability.

Scheduling Appointments

To schedule an appointment, users can use **New by Date/Tutor** or **Wizard** and follow the steps.

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Using New by Date/Tutor:

Go to **Center Attendance** > **Appointments** > **New by Date/Tutor**

1. Use the filter to find available tutors or dates.
2. Click **Search**
3. Then click the Available tutor and select the date and time to set your appointment.
4. A pop-up will be displayed. Follow the steps to complete your appointment.

Using Wizard:

Go to **Center Attendance** > **Appointments** > **Wizard**

Follow the steps to set your appointment using this wizard.

1. Select the Student
2. Select the days to schedule the appointment.
3. Select the subject Areas and services
4. Select the tutor , you can filter the tutors by the center they are working on.
5. Select a valid Start Time, Appointment duration and Date.
6. Then click the **Schedule Appt** Button

There is an Administrative tool that allows you to set a **Manual Appointment**. With this tool you can set appointments with tutors that are not available on the selected Dates or in that Center and not assigned to help with the selected Subject Areas or Services.

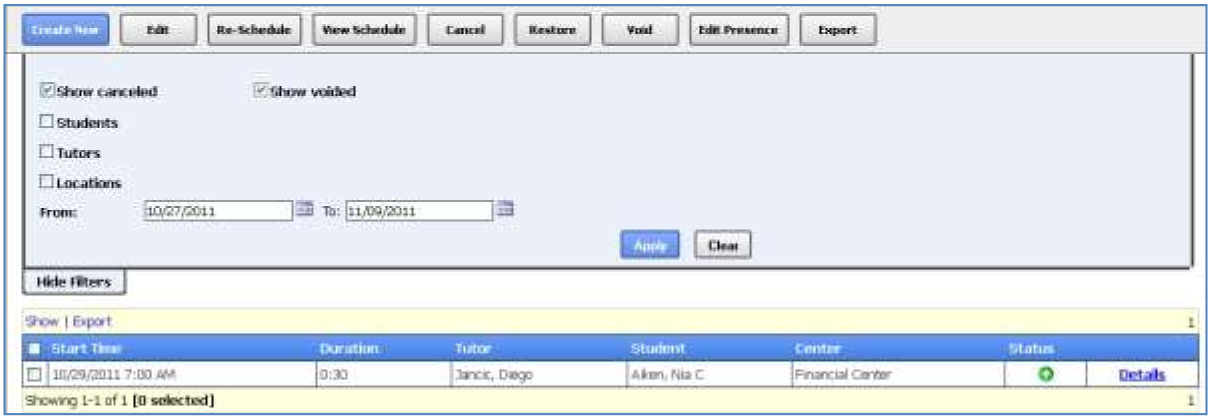
NOTE: Use this feature carefully if you cannot make an appointment using the normal methods. If you find yourself using this method often then you should ***ensure that there are available tutors***, the ***tutors are assigned to help with the Subject Areas and Services***, and ***the Center offers the Subject Areas***.

Viewing and Canceling Scheduled Appointments

To view your appointments go to **Center Attendance** > **Appointments** > **View All**

You are able to view scheduled appointments for all tutors and students. Use the search feature to view appointments for a specific student, tutor, or center. You may also use the search feature to view canceled and voided appointments.

To Cancel them, select the appointments and click the **Delete** button. Following image displays the Appointment Filters:



Generating Appointment Reports

Accudemia displays the following appointment's report to Administrator Users.

Go to **Center Attendance** > **Reports**

1. Appointments - Scheduled : Displays scheduled appointments in the past or the future.
2. Appointments - Daily : Displays daily appointments
3. Appointments - History: Displays history of past appointments.
4. Appointments - Detailed History: Displays detailed history of past appointments.
5. Appointments - No Shows: Displays no shows appointments.

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Collecting Feedback from Students

Setting up Surveys and Publishing to Students

Create a Survey

Go to **Administration** > **Surveys** and click **Create New**

1. Type the **Survey Name** to the .
2. Select how the survey will be displayed to users at **Display To User**.
3. Select where and when the survey will be displayed at **Survey Event** and **Sign in basis**.
4. Select the moment which the survey will be displayed at **Show at**
5. Select the users which this survey it is for. In this case select to Students.
6. Select the place/center where this survey will be shown
7. Click the **Save Changes** button.

Advanced settings

This option sets the start date and end date available of the survey, and when it has to be displayed. **Remind after** and **Force answer after** Use this settings to force or remind to users to answer the survey after a time.

Questionnaire

Complete the questionnaire survey with the feedback information needed. A questionnaire can have multiple pages. You can add or delete pages. For a question you can define the text to be displayed (you can use colors and various fonts), the type of question, if they are required and then answer choices if the question is multiple choice. When you select multiple choice, a new check box will be display with the option to allow multiple responses. You can move the questions up or down within a page. You can also move the questions up or down.

NOTE: Use the Preview option to verify the presentation of the survey.

Answering the Survey

To answer the survey, user must complete the Questionnaire. The questions mark with an asterisk are required.

After complete the questionnaire, click the **Save Changes** button, then the survey will disappear from the **Pending surveys** list.

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Generating Survey Reports

To view the surveys go to **Administration** > **Reports**:

- Survey Results: This report shows the survey evaluation.
- Session Surveys Results: This report will show surveys results. It can be grouped by Center, Tutor, Subject area and Services.

Both displays surveys in different order. You can customize the reports to view filtered by criteria. Also, it allows to show the survey as a pie chart, if the data matches with the graph.

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Tracking Classroom Attendance

Setting up Classroom Attendance

To edit your College Classroom Attendance go to:
Administration > **Control Panel** > **Class Attendance**

You can set default classroom settings. Tardy period, cut off period and duration as defaults. Set your schedule customization as default to your new classes.

Also, set options to what Accudemia should do when unresolved Sign-Ins are created in particular cases. To save your changes click the **Save Changes** button.

NOTE: This settings will work for General College Classrooms, scope new settings to each classroom when the classroom has different off-times, settings or durations

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Collecting Attendance Data

To collect the attendance data, Accudemia provides you two ways, first using Classroom Sign In Station and the second option using iAccu software which runs on iPad or iPhone devices.

To collect the attendance Accudemia using Classroom Sign In Station.

1. Create a sign in station for a classroom.
2. Students must to sign in to his class using the station.

NOTE: Administrators can edit the classes assistance.

All the sign-ins will be collected at Class Attendance> Attendance.

1. Select your Semester/Term.
2. Select your Class.
3. Select your Class Session.

Finally you will be able to view and edit the class attendance collected using Classroom Sign-in Station.

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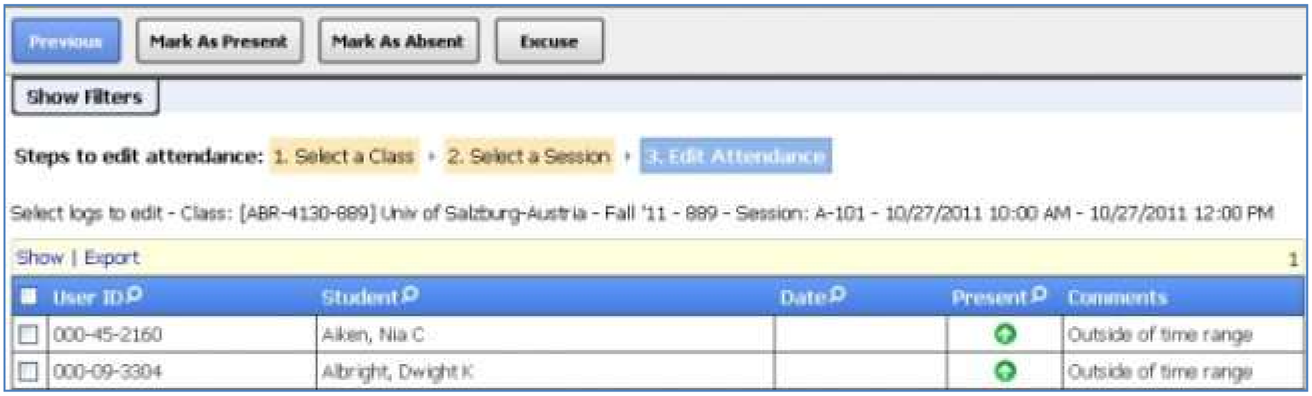

Using iPod or iPhone for Tracking Attendance

iAccu is a software designed for tracking attendance. This software works on iPhone and iPod Touch devices.

Records tutoring sessions in Academic Centers and Class Attendance

How does it work?

1. Give iAccu devices to tutors and instructors.
2. They login using their username and password.
3. Users start tracking attendance. No matter where they are, it works either online or offline.
4. It collects each student sign in.

The Image to the right is the software working on a iPhone device.

Classroom Attendance Reports

To view all about the attendance go to **Class Attendance** > **Reports**

- **Summary**: This report displays a list with Students, Student Identification Number, date of Registration, Dropped date, Attended and Absent times, Tardy and excused absentees
- **Detailed**: This report displays each class with student class information. The way that student has been logged on.
- **Absentees**: This report displays a full list of absentees each class session.

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- **Absences List**: This report display a list with the absences of registered students to filtered classes. Also displays some data as their Student Id, phone and their dropped status . Use the Absence range Also to filter users with a minimum and a maximum number of absences.
- **Overall**: This report displays the percentage attendance and the amount of canceled classes in a period.

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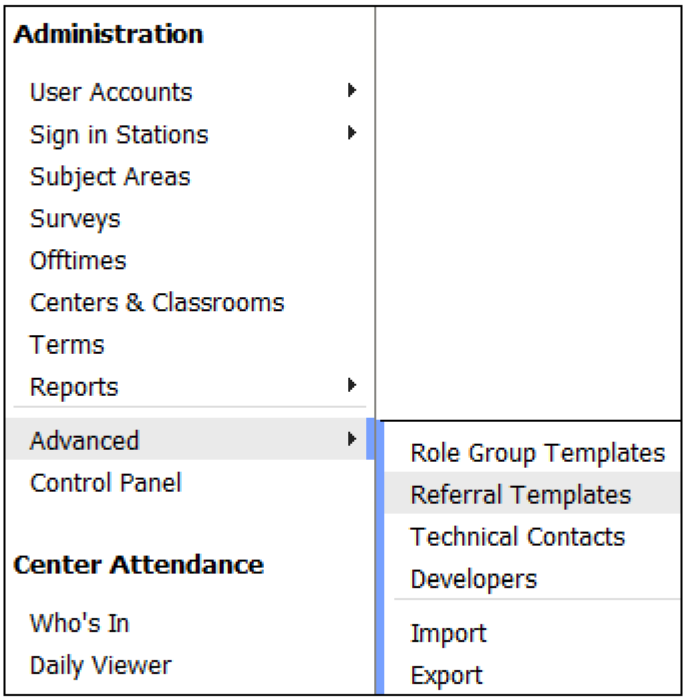
Using the Accudemia Referral and Early Alert System

Creating a Referral Form

This is broken down into 2 parts; **Creating a Referral** and **Creating a Referral Template**.

Creating a Referral

- If you have never created a referral before go to Administration> Advanced> Referral Templates
- Users who have made a referral before, to create a new referral go to Class Attendance> Referrals



1. Click on **Create New**.
2. Select the Referral Template you want to use.
3. Type and select the instructor.
4. Type and select the class.
5. Type and select the student.
6. Type and select the user who is going to follow up the student.
7. Select date to follow up on the referral, it's used as a reminder of when this referral should be reviewed/updated.
8. Type comments about why the student has problems, or the reason of the referral.
9. You can choose whether the student receives the referral updates.
10. Type and select the users who are going to be notified by updates in this referral.
11. Complete the Referral Questionnaire.

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12. Click the **Save Changes** button.

Follow up by can be left blank and then edited using the **Edit** button.

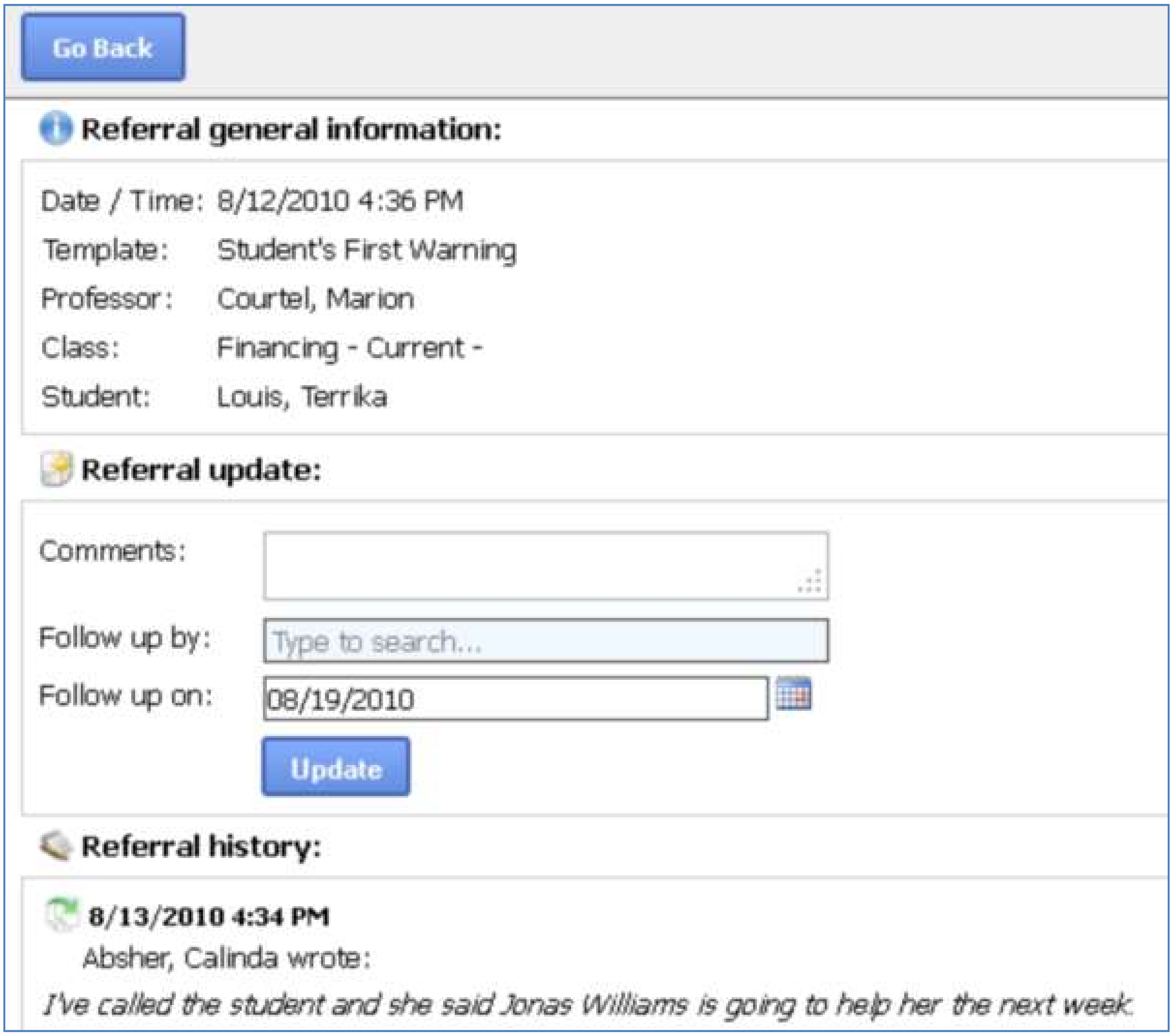
Creating a Referral Template

1. Go to Administration Advanced> Referral Template
2. Click the **Create New**.
3. Type a name for this Referral Template.
4. Type and select the user who will follow up this kind of referrals by default.
5. Type and select the users who will be notified by default this type of referrals.

Accudemia provides you a sample questionnaire as template. Customize it to your needs.

Entering Follow ups

To Entering a follow up click the **Follow up** button from the Referral Tool bar. The next image shows the referral update.



Editors and Viewers

This page can be viewed and edited by instructors and customized users. Instructors, College Administrators and Tutors can be added at **Follow up by**, they will be updated of the status of the referral.

The Referral System will send to the users **confirmations** of created referrals, **reminders** when the **Follow up on** is close to the limit date. Also will send via e-mail messages when it is updated.

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Closing a Referral

To Close referrals click the **Close** button at the referral Tool bar. A pop up window will be displayed to enter your comments and then click **Accept**.

The Referral new status will change to Close. The next image shows the close status of a referral. Use the Color Reference to know the referral status.

Viewing Referrals Reports

To get referrals report go to **Class Attendance** > **Reports**

- **Referral Summary**: This report displays student's referral in a period. Use the filters to display the referrals in a range.
- **Referral Details**: This report displays full information of the student's referral.

Other Functions

Sending Messages to Students

Chat and Messaging System

This Feature allows the communications with users via e-mail and on-line chatting. This Module can be avoid to use to students. Also, it can be restricted to use in Sign-in Stations. Go to **Administration** > **Control Panel** > **User Accounts** to edit your messaging restrictions:

1. Settings to restrict users communication
2. Enable messaging

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3. Enable chat
4. Enable communication in sign in stations
5. Enable communication between students

How to send a message using Accudemia to an student

1. Click the **New Message** button on the bottom toolbar.
2. Wait for New Message pop up window.
3. Type and select the student to send the message (can be filtered by **Contacts**, **Classes** or view all **People**)
4. Type the Subject of the message at **Subject**.
5. Enter your Message into **Message**
6. Click the **Send** button to send the message.

The message can be viewed at student's **Inbox**

Viewing Who is Signed-In

Who is in at a Center Location

Login to your college account, then go to: **Center Attendance** > **Who's In**.

Then use the filter to display who is logged in at what Center, which Subject Area they are being helped, and Services they are using at the College. You can show Students or Tutors.

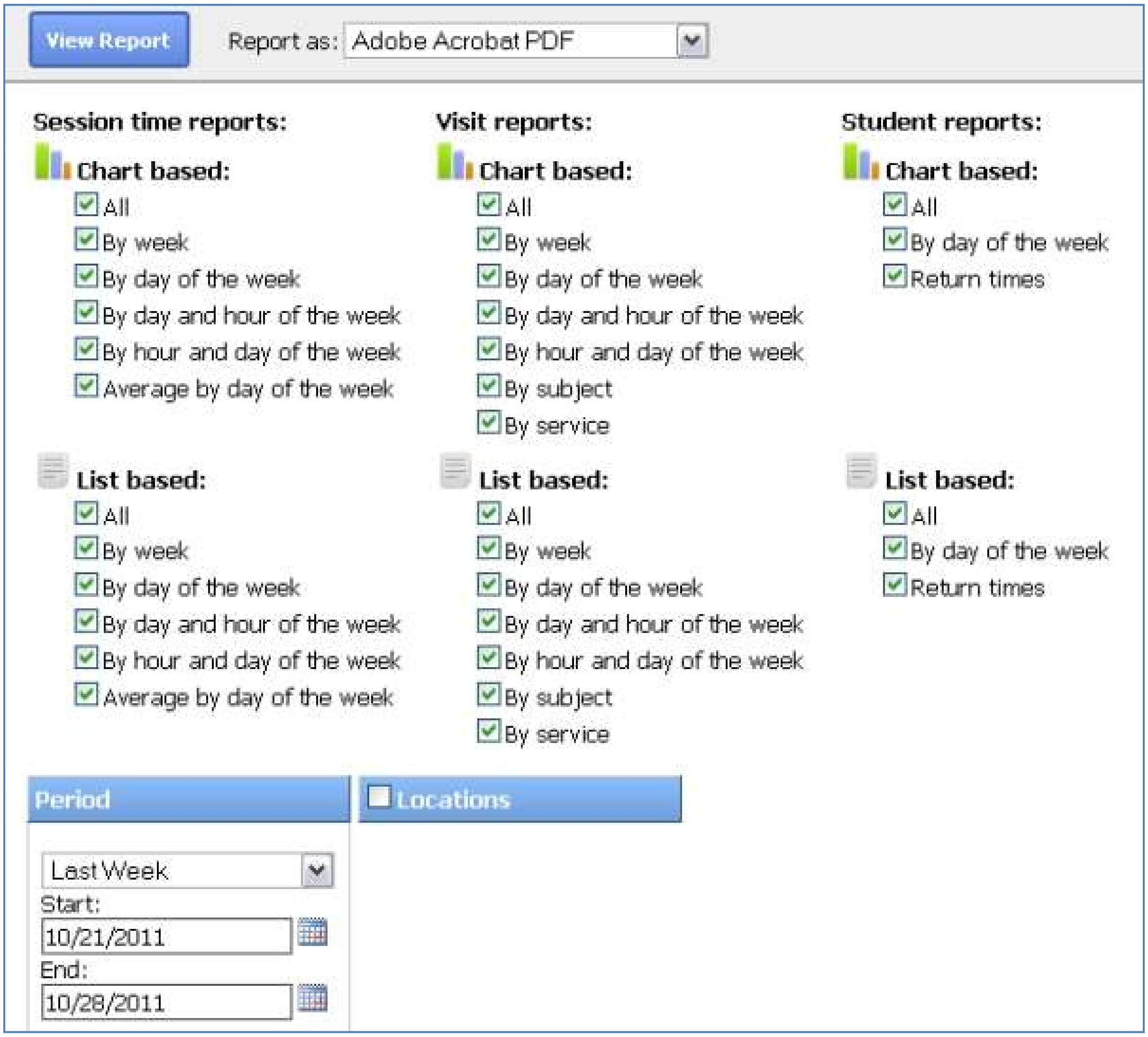
Who is in a Center Sign in station

It is available to everybody from the Sign-In Screen (if the settings so allow) which lists only tutors or only students signed into the system.

Viewing Traffic Analysis Report

It shows many different reports with graphics mode reports about your college traffic. Use Traffic Analysis Report Configuration to customize the data to download.

All the generated reports are downloaded to your computer as a compressed ZIP file. This report contents all the fields selected as default.



Changing Terminology

This module lets customize the terminology that you want to Accudemia System use.

Type the new term you would like the Accudemia System to use in the “Current Term” boxes and the default term will be changed throughout the system.

Using Student Groups

To define groups of persons

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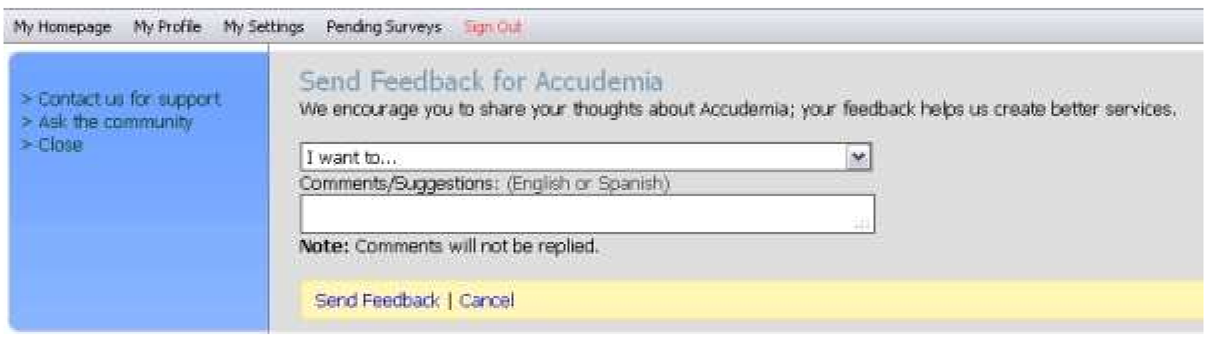
1. To create a new group click **Create New**.
2. Type Group Name at **Name**.
3. Select the users related to this new group.
4. Click the **Save Changes** button to save your changes.

After defining your student group, you will be able to filter your reports using that feature.

Sending Feedback to the Development Team

To send Feedback to the development team click the **feedback** and complete it.

Note: Questions submitted using the feedback form will not be answered by the support team. It's intended only for feedback purposes.



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Advanced Topics

Connecting ADX to your College Data

ADX (Accudemia Data eXchange) is a really powerful and fast solution for exchanging information among your different systems. You can automatically import all your updated information, and keep all your applications always in sync.

Use ADX to upload your college database. Use our CSV samples to guide the import process:

Accudemia Data eXchange - ADX or download the Full Reference Manual

To download the ADX tool go to **Administration** > **Advanced** > **Import**.

Access ADX using your Administrator User Account and password. The Domain can be the address you use to access Accudemia (myschool.accudemia.net). Now, you are logged in the Accudemia Data Exchange control panel.

Click on **Create New Import Task** to select which file has to be imported, and how it will be done. Follow the steps described there, they might vary depending on what you are going to import to Accudemia.

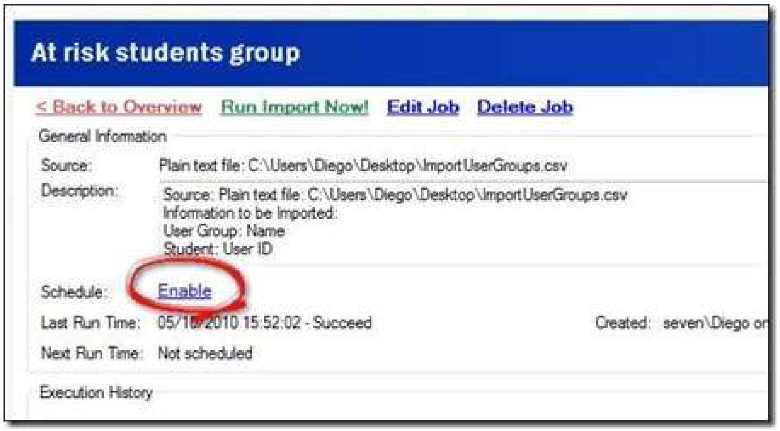
Complete the remaining steps to save the changes. To run the job and import the file to Accudemia, you have to click on **View Details** and then on **Run Import Now**.

Setting up Scheduled Import

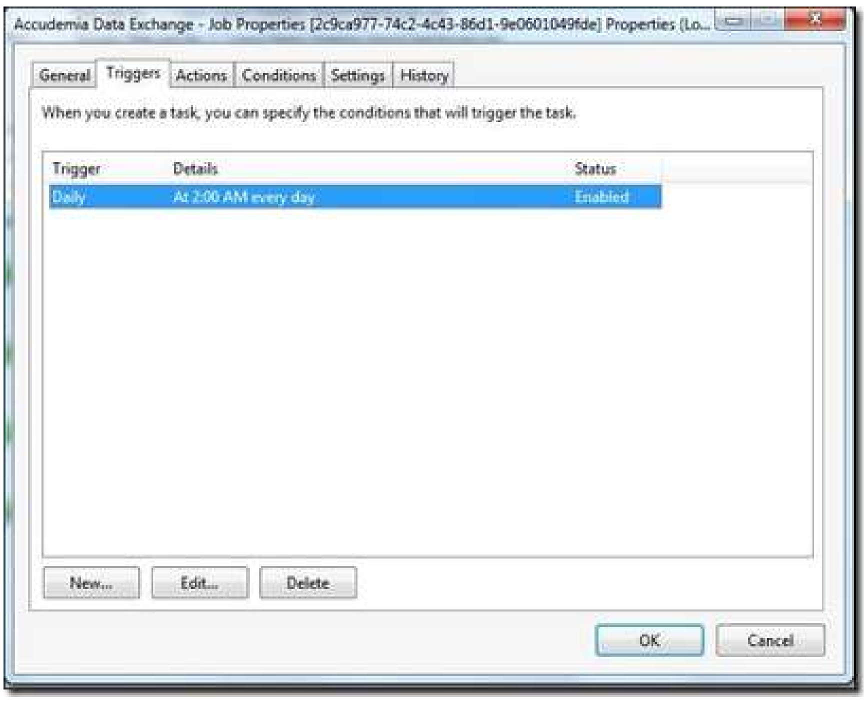
To set up scheduled import, once you have created an *Import Job* in ADX, follow the next steps:

Select the Import Job, and click on *View Details…*

1. Click *Schedule* and then click *Enable*, as shown in the screen capture below. There you will see all the options available by the Windows Task Scheduler



2. There's a powerful set of options to choose when the information is imported.



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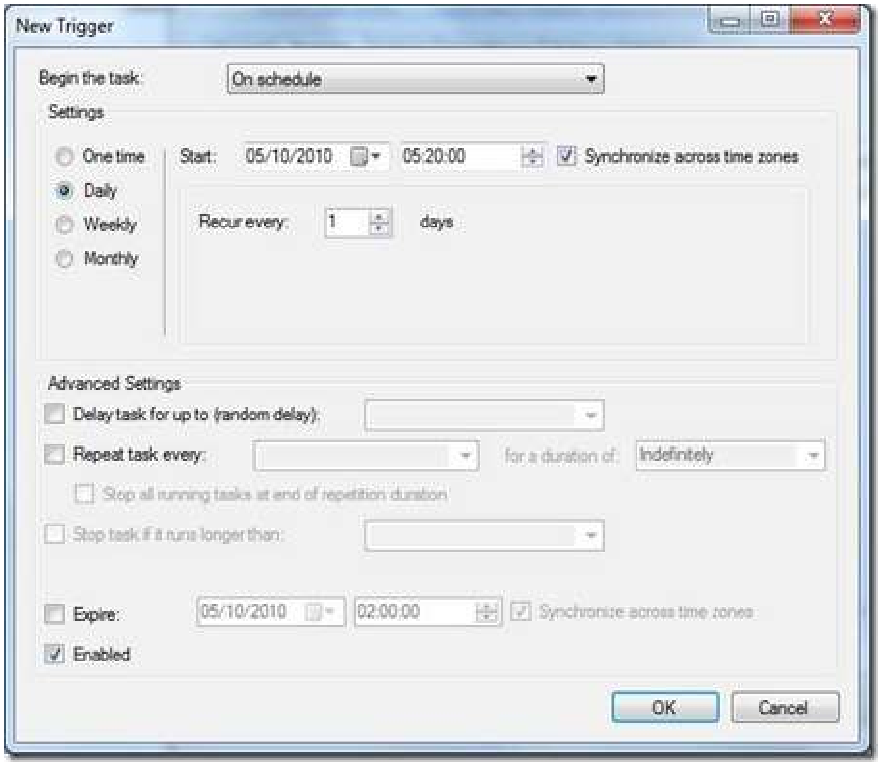
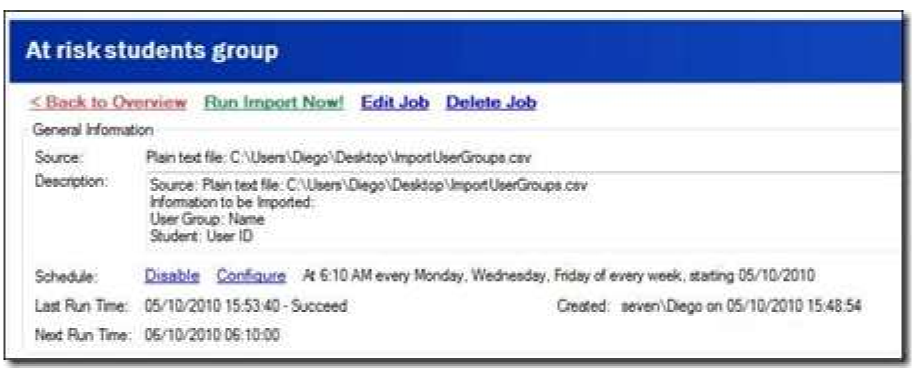


3. Once you have clicked *OK*, you will see the summary details on the job details tab.



Using SMS with Accudemia

To use SMS with Accudemia for confirmations and reminders you must activate this option. **You need to purchase AccuCredits** to enable this feature.

Learn More

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1. To enable this option go to **Administration**> **Control Panel**> **Appointments**, and at the last section entitled **SMS Notifications** place a check in the box to enable this option. You can also set the amount of hours in advance to send this reminder SMS. **Save changes** by clicking the button at the top.
2. Optionally if you would like to enable messages to be sent when a user is logged into Accudemia's Homepage then go to **Administration** > **Control Panel** > **User Accounts**. Once there in the last section entitled **Communication** place a check in the box next to "Enable Messaging". **Save changes** by clicking the button at the top.
3. The system user sending messages are allowed to send SMS messages to anyone in your College. You **must have the students cell phone number** in Accudemia because this feature uses the cell phone number of the User's Profile.

Setting up System Access Roles

As administrator you are able to create System Access Roles:
Go to **Administration** > **Advanced** > **Role Group Templates**.

Create Role Group Template:

1. Go to **Advanced > Role Group Templates**
2. Click **Create New** to create a new one.
3. Type the name of this role group at **Group name**
4. Then select the roles and the permissions that users will be able to do at the grid.
5. Click the **Save Changes** button to create the Group Role.

Edit a User to use this Role Group

1. Go to **Users Accounts**, choose a user, and click **Edit**

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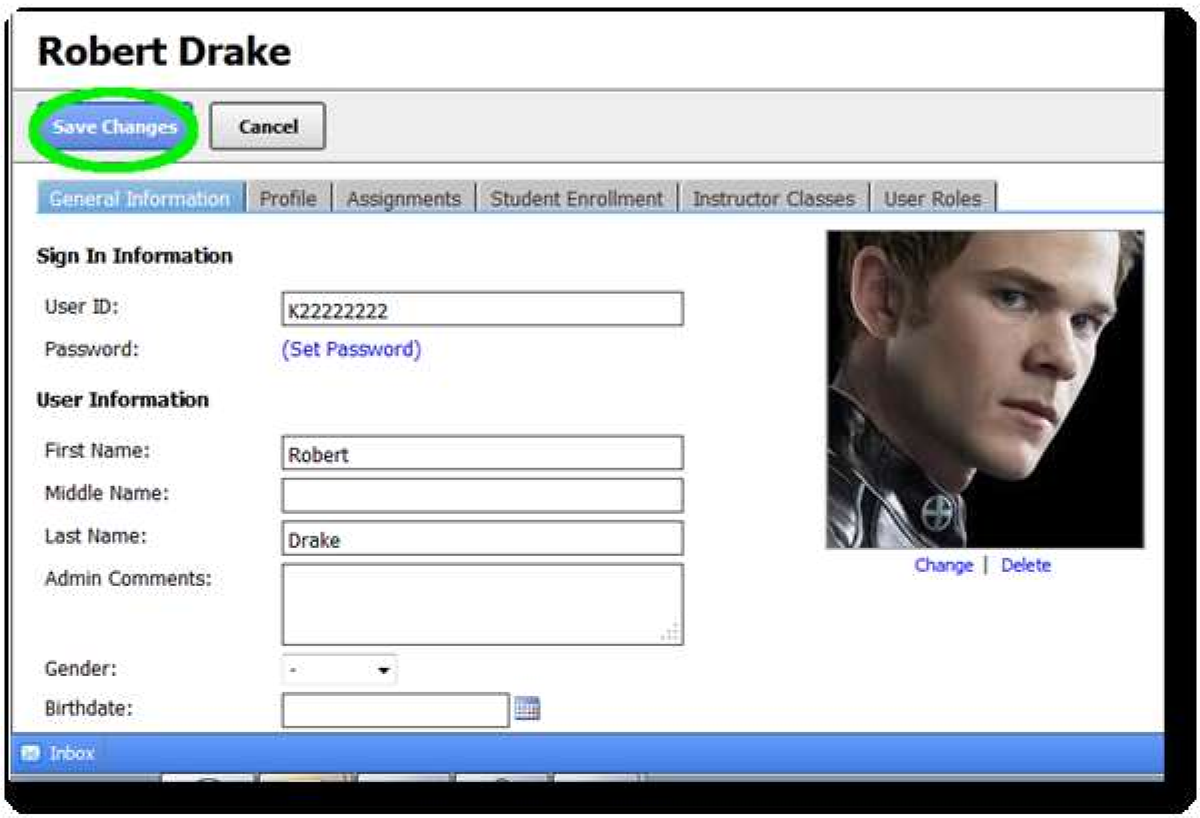
2. Then scroll down to the **Security** section and set them as a **System User** by clicking the checkbox.

3. Now you can see that you can set them to use the **Role Group**, Select the **Role Group** at the list.



4. Click the **Save Changes** button.

This user will be able to do the permissions added. Also this user gets a new role as System User.

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Using the Appointment Wizard

Use the **Appointment Wizard** to schedule appointments recursively. Follow the steps to create the appointment/s:

1. Go to **Center Attendance** > **Appointment** > **Wizard**
2. Select the student to set the appointment, click on his name at the grid.
3. Click **Next** to be able to select the date to schedule the appointment.
4. Click **Next** to get to the “Subject and Service Selection” box. Select the course for which you want to schedule the appointment and the service/s.
5. Click **Next** to get to the Tutors section. If you are logged as College Administrator you have the possibility to choose the center on the top of the box. Below you find a list with tutors available for the chosen day, subject, service and center. Select the tutor you like to schedule the appointment with.
6. Click **Next** to continue with the last filter step of the Wizard.
7. Click **Next** to get to the “Schedule Screen”. Tutor’s schedule displays green slots when is available. Choose the date and time you would like to make the appointment.
8. Click **Schedule Appt** to set the appointment. Once the appointment is saved you will be shown the Appointment List.

Accudemia Quick Start Videos (No Audio)

1. How to Create New Term/Semester
2. How to Create New Center
3. How to Create New Service
4. How to Create Survey
5. How to Create Appointment
6. How to Create Appointment Using "Appointment Wizard"
7. How to Cancel Appointment
8. How to Upload Students
9. How to Upload Subject Areas
10. How to Upload Class Enrollment/Registration
11. How to Reset Password
12. How to Edit Tutor Schedule
13. How to Delete Data in Bulk

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