Advanced Options

Export Data

To export your data go to the **Advanced Options** section and click **Export Data**. You can download your data by clicking the **Download** lightened text. You are able to download your data as **.CSV** , **HTML** and **Excel 2007/10** file. The data you can download is:

- **Users** (Can be filtered by role)
- **Classes**
- **Visits**
- **Credits - Current**
- **Credits - All** (History showing credits added and used)

Export History

You can now view a history of past exports that have been ran from the system by clicking the **View Past Exports** button at the top of this area.

Import Data

This is the place where you can import your members, your events and everything to quickly get started. To make it as simple as possible we have defined a bunch of formats to follow. By creating a file as explained below, you can directly upload the file and **AccuClub** 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 events 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** from the main menu.

Classes Import

Valid headers:

- **Code**
- **Name**
- **Details**
- **Department**
- **Term**
- **Schedule**

Explanation:

The Class **Code** has to be unique for each term. If there are 2 (or more) classes 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 class, it's usually displayed along with the Code.

The **Department** is optional.

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

The **Schedule** field is optional and if used 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 class is given, without spaces. For example: MWF means that the class 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 class. For example: 20131007 specifies that the class is on October 7th, 2013. - <start> is the start time of the class, in military time. For example 900 or 0900 refers to 9am, 1730 refers to 5:30pm. - <end> is the end time of the class, 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
ACCT-1100	Financial Accounting I	Course details	Economics	Spring 2015	MW 900-1040 A-101
BIOL-1111	Biology I	Course details	Biology	Spring 2015	TF 1500-1620 A-102
TCDW-1205	Technical Drawing I	Course details	Industrial Design	Spring 2015	WS 900-1040 A-201
TCMO-0101	3D Modeling	Course details	Industrial Design	Spring 2015	R 900-1040 A-202
HISE-1212	European History	Course details	History	Spring 2015	TR 1300-1400 A-101

Download the example file (.csv)

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Membership Plan Registrations Import

Valid headers:

- **PlanName**
- **UserEmail**

Explanation:

The **PlanName** specifies a registered membership plan in your account.

The **UserEmail** specifies a valid e-mail address that uniquely identifies a registered user in your account.

Example:

PlanName	UserEmail
Basic plan	wpooh@accuclass.com
Medium plan	roger.rabbit@accuclass.com
Extended plan	duck@accuclass.com
Extended plan	fred@accuclass.com
Extended plan	homerjs@accuclass.com

Download the example file (.csv)

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Members Import

Valid headers:

- **FirstName**
- **MiddleName** (optional)
- **LastName**
- **Email** (optional)
- **CardNumber** (optional)

Explanation:

The **OperatorId** is used to uniquely identify the user, it must be unique across all the users in the system, including members, operators and administrators.

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

The **Email** is optional, but highly recommended. It allows users to login without remembering their ID, 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 **CardNumber** is optional. It's only useful if you plan to track attendance by reading physical cards using a card reader or the mobile app for iPod touch/iPhone/iPad.

Example:

FirstName	MiddleInitial	LastName	Email	CardNumber
Winnie	T	Pooh	wpooh@accuclass.com	1089
Roger		Rabbit	roger.rabbit@accuclass.com	1035
Donald		Duck	duck@accuclass.com	6584
Fred		Flintstone	fred@accuclass.com	1078
Homer	J	Simpson	homerjs@accuclass.com	1812

Download the example file (.csv)

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Operators Import

Valid headers:

- **FirstName**
- **MiddleName** (optional)
- **LastName**
- **Email** (optional)
- **CardNumber** (optional)

Explanation:

The **OperatorId** is used to uniquely identify the user, it must be unique across all the users in the system, including members, operators and administrators.

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

The **Email** is optional, but highly recommended. It allows users to login without remembering their ID, 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 **CardNumber** is optional. It's only useful if you plan to track attendance by reading physical cards using a card reader or the mobile app for iPod touch/iPhone/iPad.

Example:

FirstName	MiddleInitial	LastName	Email	CardNumber
Winnie	T	Pooh	wpooh@accuclass.com	1089
Roger		Rabbit	roger.rabbit@accuclass.com	1035
Donald		Duck	duck@accuclass.com	6584
Fred		Flintstone	fred@accuclass.com	1078
Homer	J	Simpson	homerjs@accuclass.com	1812

Download the example file (.csv)

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Administrators Import

Valid headers:

- **FirstName**
- **MiddleName** (optional)
- **LastName**
- **Email** (optional)
- **CardNumber** (optional)

Explanation:

The **OperatorId** is used to uniquely identify the user, it must be unique across all the users in the system, including members, operators and administrators.

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

The **Email** is optional, but highly recommended. It allows users to login without remembering their ID, 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 **CardNumber** is optional. It's only useful if you plan to track attendance by reading physical cards using a card reader or the mobile app for iPod touch/iPhone/iPad.

Example:

FirstName	MiddleInitial	LastName	Email	CardNumber
Winnie	T	Pooh	wpooh@accuclass.com	1089
Roger		Rabbit	roger.rabbit@accuclass.com	1035
Donald		Duck	duck@accuclass.com	6584
Fred		Flintstone	fred@accuclass.com	1078
Homer	J	Simpson	homerjs@accuclass.com	1812

Download the example file (.csv)

Updating Users Email by Card Number

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:

NewEmail	CardNumber
wpooh@institution.com	1089

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

Download the example file (.csv)

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Updating Users Email by Old Email Address

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:

NewEmail	OldEmail
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)

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Updating Users Email by Phone Number

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:

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

Download the example file (.csv)

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Update Users Status

Valid headers:

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

Explanation:

The **Email** is required. It's used to find the user via their email address.

The **Active** is required. This will set the user as active or inactive using “Yes” or “No” values.

Example:

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

Download the example file (.csv)

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Import History

You can now view a history of past imports that have been ran from the system by clicking the **View Past Imports** button at the top of this area.

Settings

This is the area designated to manage all of the backend settings of the software. Items such as permissions using **User Roles**, changing the terminology used through **Translations**, and more!

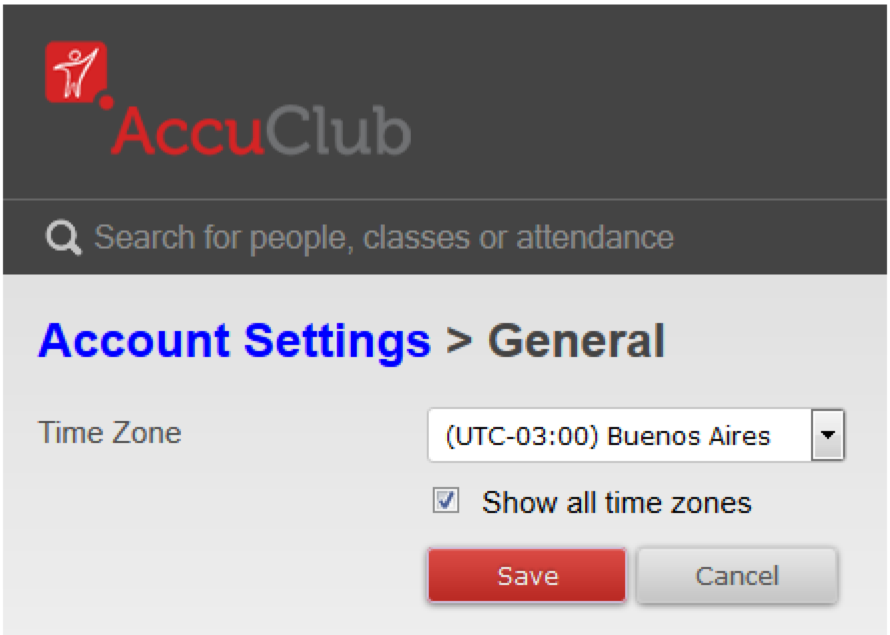
General

General account settings, such as the time zone, license agreement, user profiles, etc.

Timezone

To set up your **Timezone** go to **Advanced Options** and click **Settings**. Once there simply select your timezone from the drop-down box (default is EST).

Click **Save** button to save your timezone.



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User Roles

Customize the user roles and their permissions.

Default User Roles

There are three distinct default **User Roles** in AccuClub which are **Administrator**, **Operators**, and **Members**. 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 AccuClub 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.

Members

Members 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 **Member** 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 **Members** 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.

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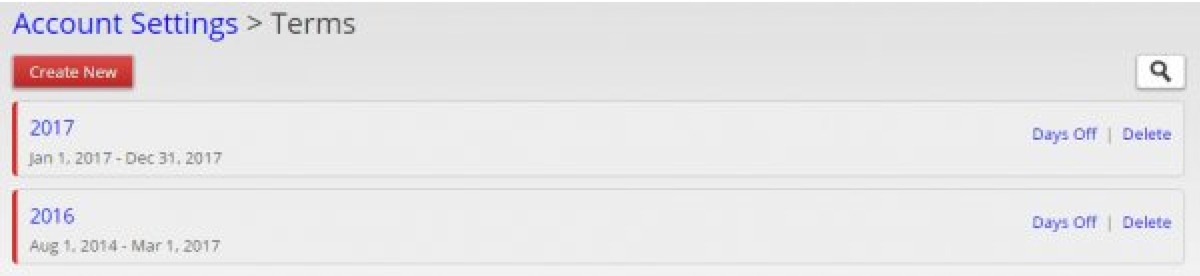
Terms



Define the terms where the events will be available. These are simply used for reporting periods in **AccuClub** and can help define how long a **Class** will be tracked.

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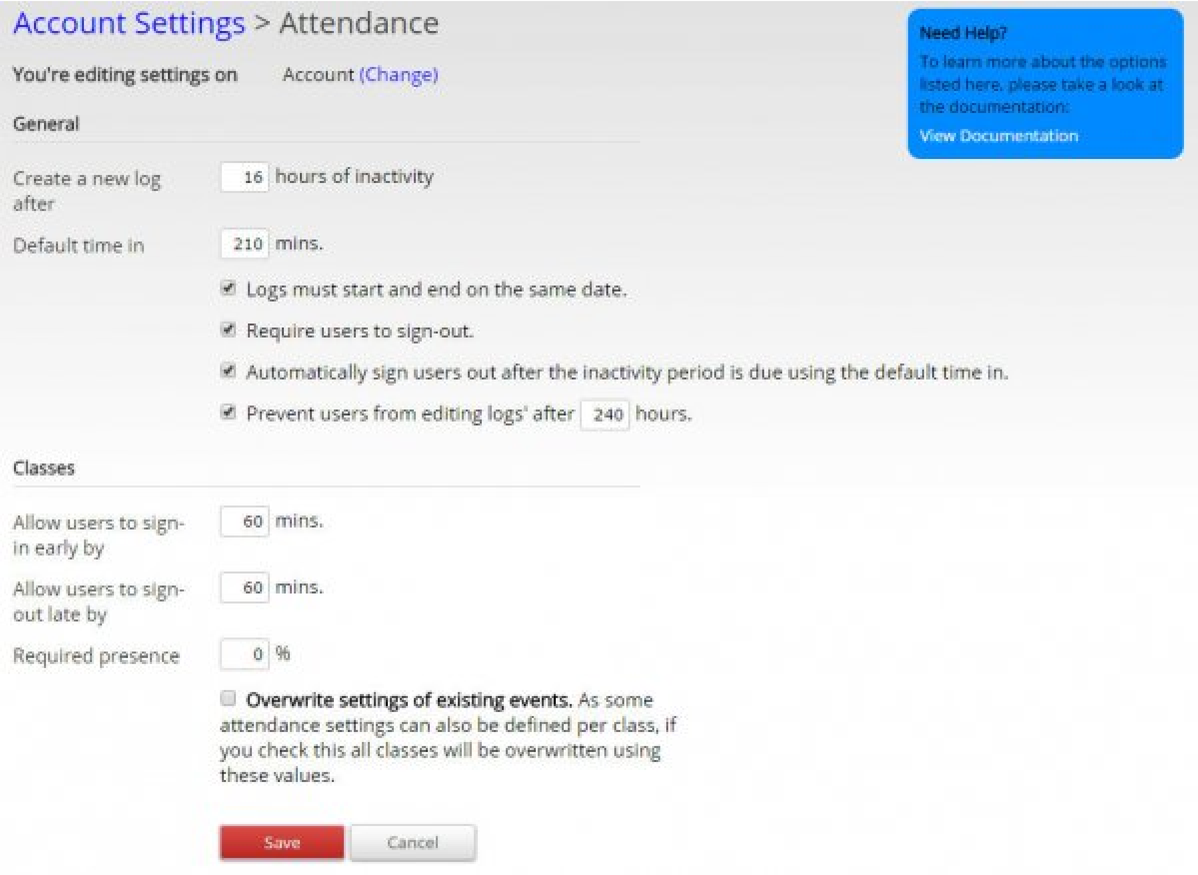
Attendance

Attendance tracking settings, i.e. if sign-out is required, presence % for events, etc.



These settings are across the entire AccuClub software.

General

- **Create a new log after X hours of inactivity** - This allows you to auto-logout **Members** who have exceeded **X** minutes.
- **Default time in X mins** - This allows you to set the default amount of time your typical **Class** last and can be set below to give an **Member** this time if the **Member** exceeds the above **X** minutes.
- **Logs must start and end on the same date** - Check this box if you will be tracking training sessions that last longer than within the same day.
- **Require Members to sign-out** - This allows you to set whether you require sign-outs for the training sessions.
- **Automatically sign Members out after the inactivity period is due using the default time in** - Check this box if you prefer to give the default time set above if the **Member** exceeds the **X** hours of inactivity.
- **Prevent users from editing logs' after X hours** - This option will not allow the logs' to be edited by users other than admins after **X** time has passed.

Classes

- **Allow Members to sign-in early by X mins** - This sets the start of the time window **Members** can sign-in before the actual start time of the **Class**.
- **Allow Members to sign-out late by X mins** - This sets the end of the time window **Members** can sign-in after the actual start time of the **Class**..

- **Required presence %** - This is the percentage of time the Member must attend the **Classes** to receive credit.
- **Overwrite settings of existing courses As some attendance settings can also be defined per Class, if you check this all courses will be overwritten using these values** - Use this check box if you made changes to any of the settings above and want to force them to be used across the entire AccuClub software. This will overwrite any settings set on the **Class** level.

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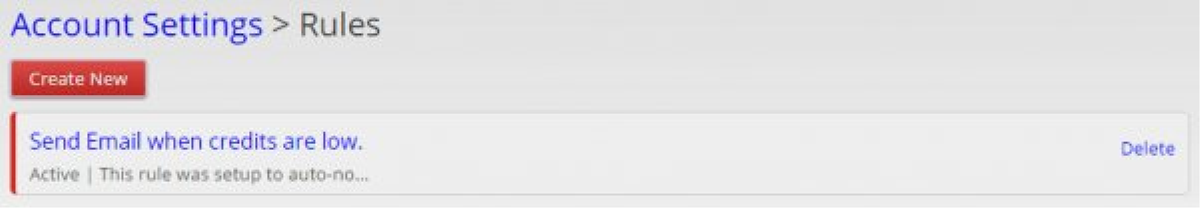
Rules

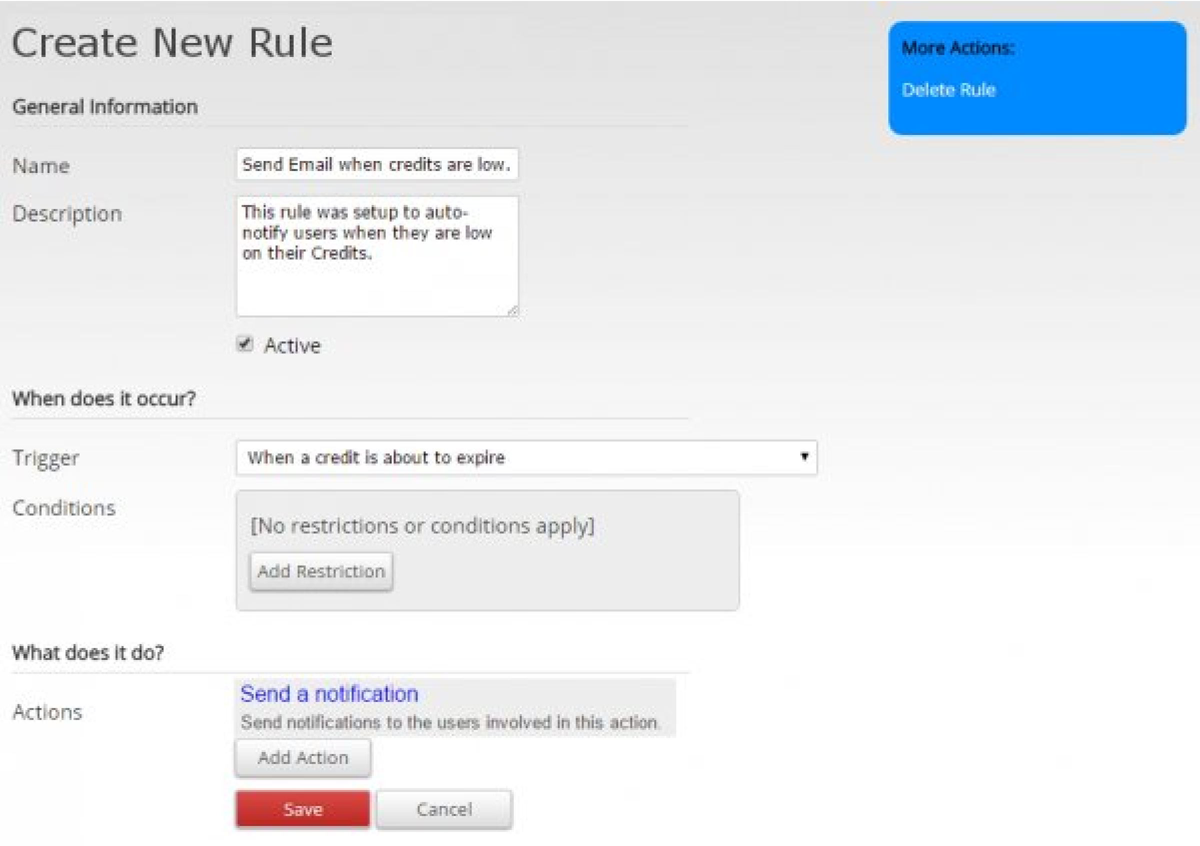
This is a really cool feature that uses a **Rules** engine where you can define events that can do things like sending emails and other system responses based on your requirements. This is recommended only for advanced users.



Create New Rule

Following these steps will create a new rule:

1. Click the **Create New** button to get started.

- 

1. Fill-out the info:

General Info

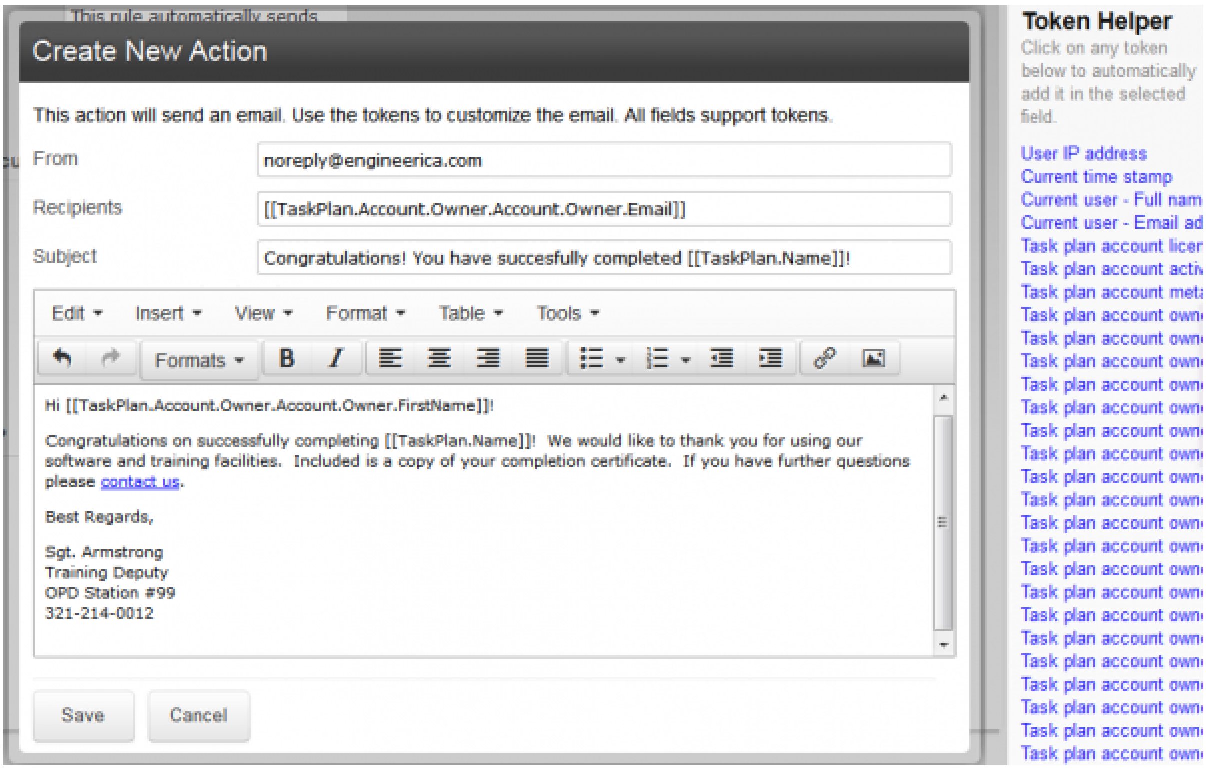
- **Name** - A simple name so you know what rule it is.
- **Description** - A brief description to further explain the rules function.

When does it occurs?

- **Execute on event** - 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.
- **Example:**



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.

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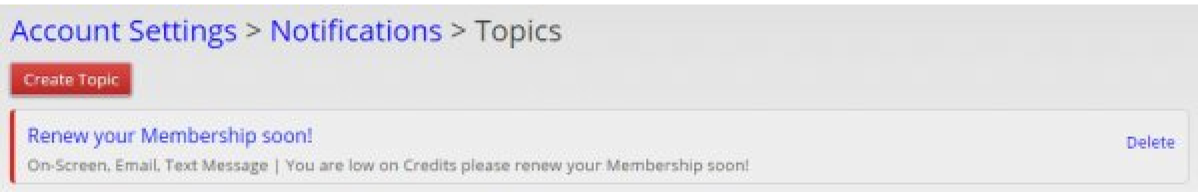
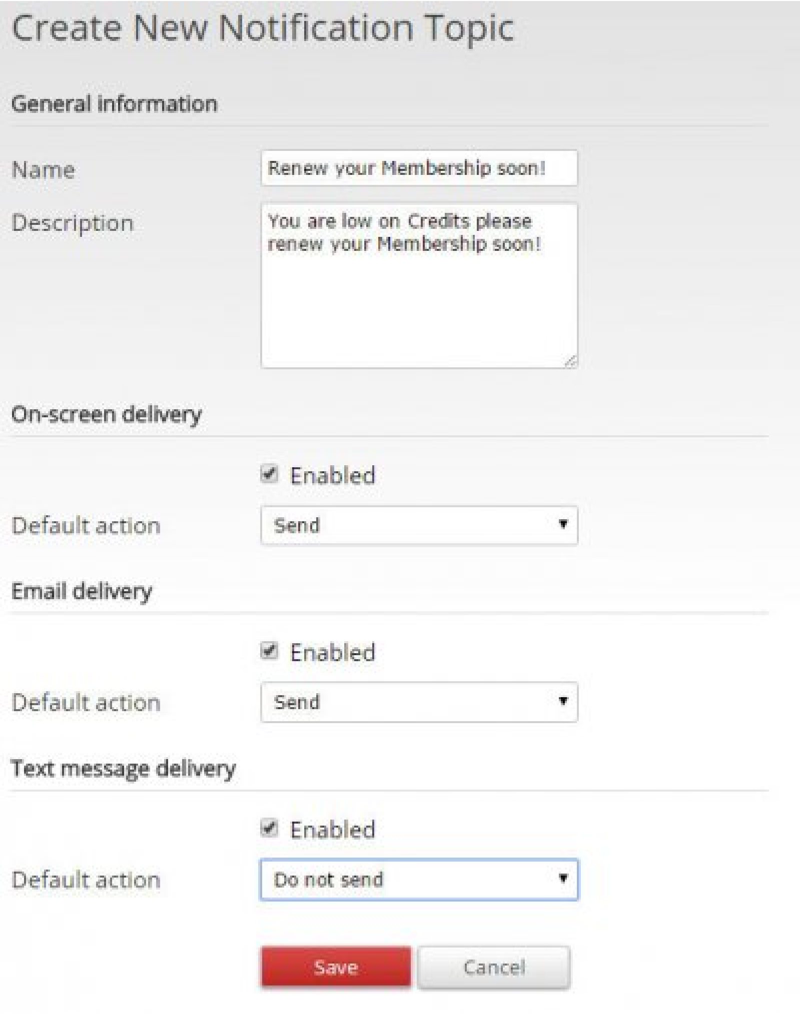
Notifications

Notifications engine, define notification topics, configure notifications via e-mail, text message and/or screen.





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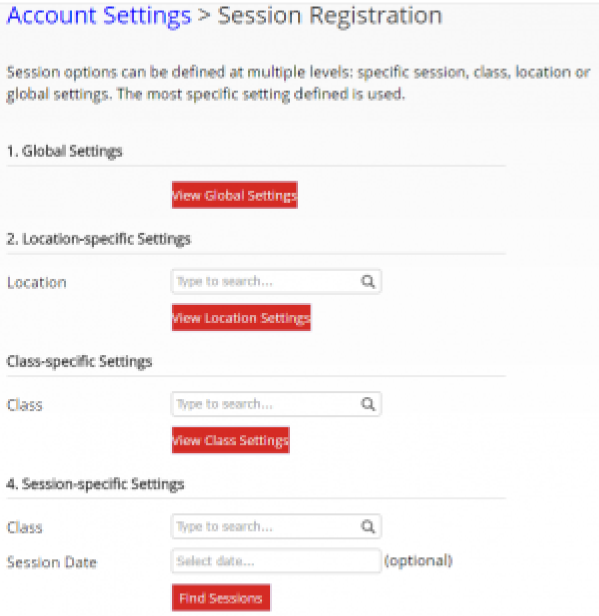
Session Registration

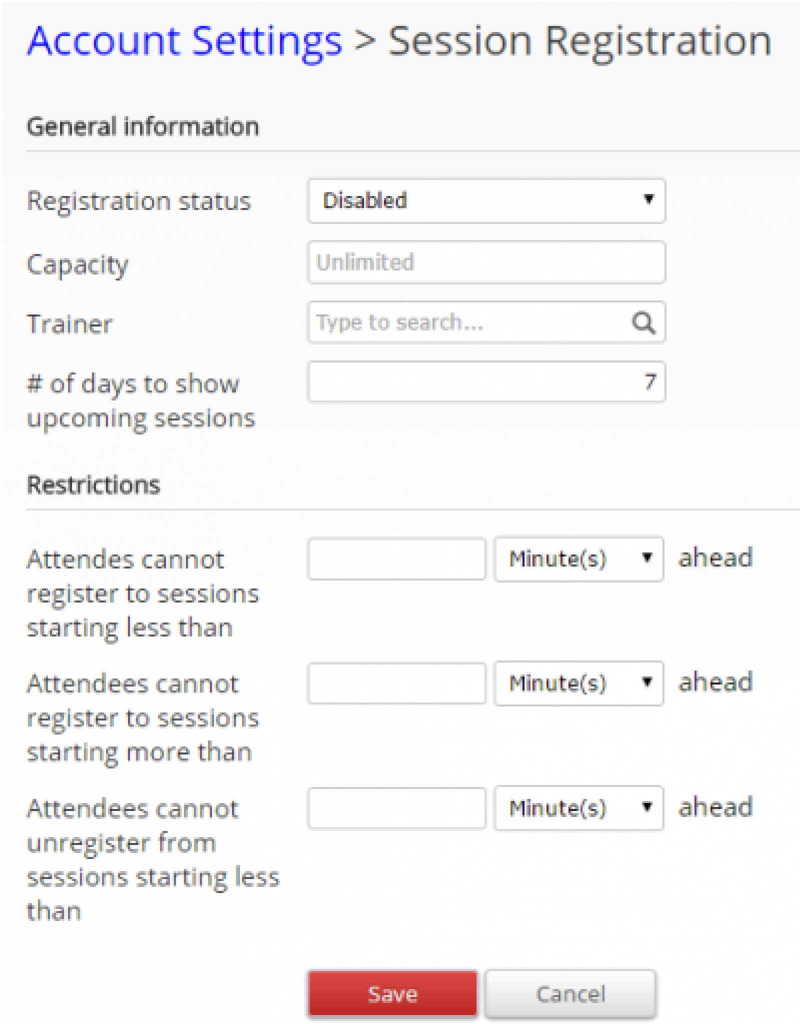
Set room capacity, trainer information, and enable session registration. Session options can be defined at multiple levels: specific **Class** session, **Class** itself, a **Location** or as a **Global Settings**.



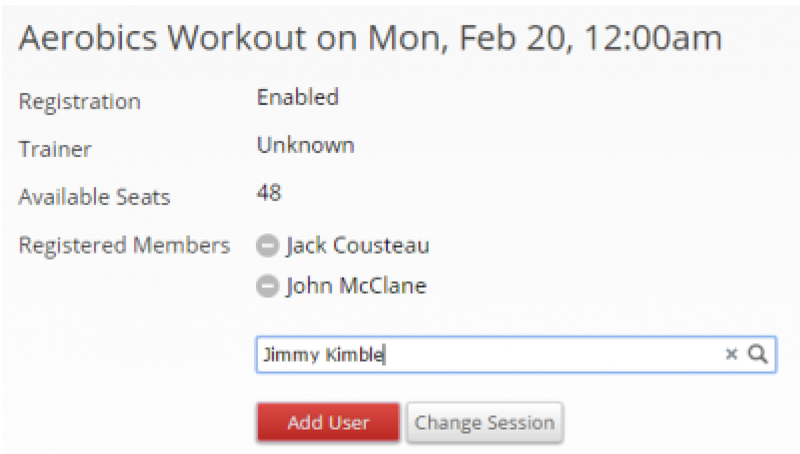
The most specific settings defined are used.

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**
   - **Class** - Use this field to set registration settings for a specific **Class**.
4. **Session-specific Settings**
   - **Select Course** - Use this field to set registration settings for a specific **Class AND**
   - **Session Date (optional)** - Use this field to set registration settings for a specific **Class** session.

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



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



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

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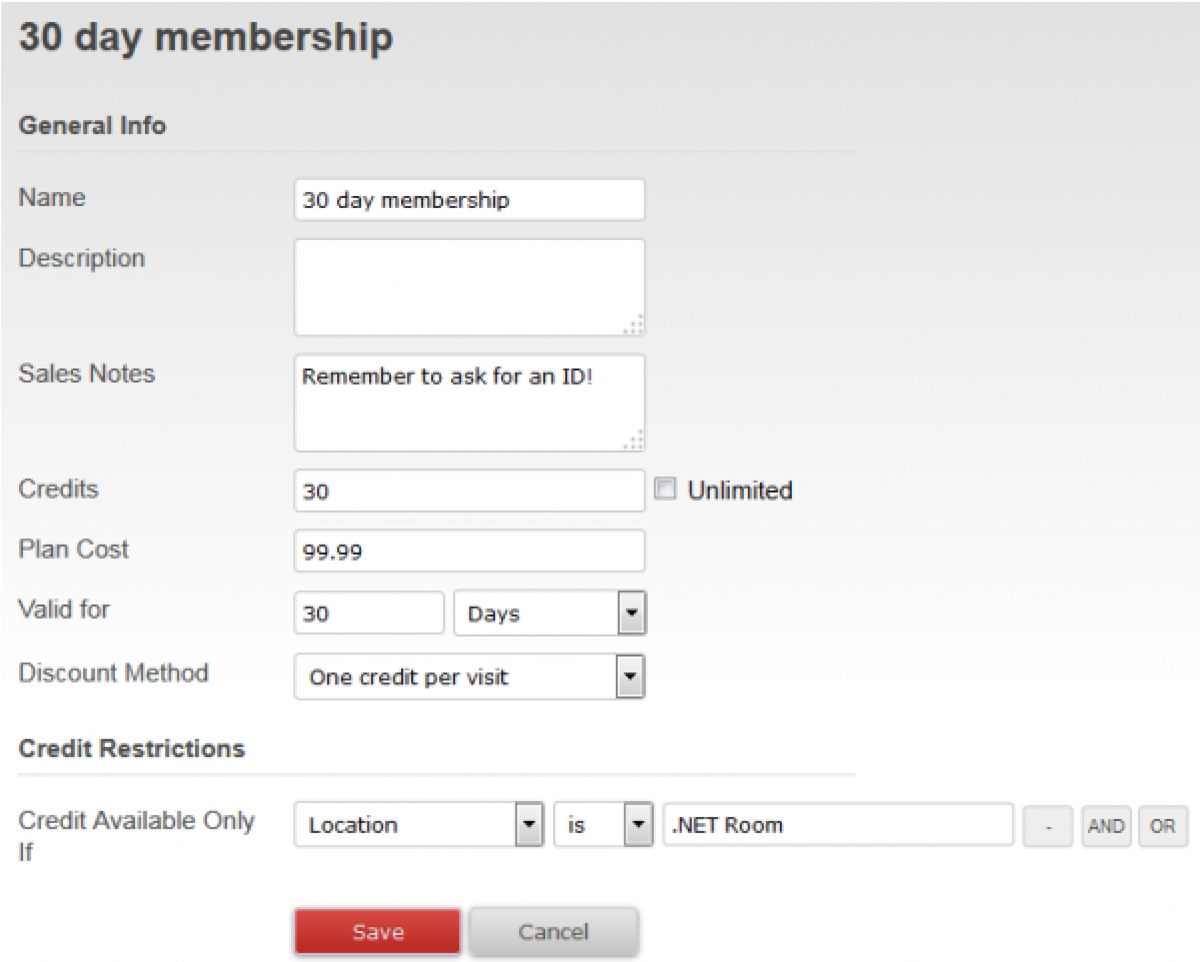
Membership Plans

Define the plans available to purchase by members.

Here are the steps to create Membership Plans:

1. Click the **Create Plan** button in the top left.
2. Enter the following information about the Membership Plan:
   - **Name:** A name for the Membership Plan.
   - **Description:** Brief Description of the plan.
   - **Sales Notes:** A note that appears when salespersons attempt to assign the plan for a member.
   - **Credits (Can be set to Unlimited):** How many credits this Membership plan is worth.
   - **Plan Cost:** The cost in dollars of the Membership Plan
   - **Valid for:** The expiration in X hours, days, weeks, months, or years for the plan.
   - **Discount Method:** This is stating how the credits will be used under this Membership plan whether using visits or time. I using time choose your rounding options.
   - **Credit Restrictions:** (Credit will be used at anytime until it expires is the default.)
     - Credit Available Only If X IS/NOT Y AND/OR…
       - **X:** This is the ***basis*** for the statement and can be set to:
         - Location
         - Event
         - Remaining Credits
         - Day of Week
         - Month name
         - Time
       - **IS/NOT** This sets the statement to either question true or false criteria.
       - **Y:** This is the ***criteria*** for the statement and can be completely customized.
       - **AND/OR:** This can be used to set multiple connected(AND) or separate(OR) condition statements.



Tags

Create, update and delete the tags in your account.

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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.

When you make a change to a certain keyword it will change this throughout the account.

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View Audits

View the actions performed by the users.

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Login Appearance

Select options related to the appearance of the login screen.

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Navigation Bar

Select what links the users will see in the navigation bar.

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Single Sign-On

Manage single sign-on settings.

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