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General

General settings include options to create users (members, staff/operators, admins, etc.), Classes, and Locations. There are also some General reports you can run related to the users, classes, and locations available in **AccuClub**.

Users

In this section, you'll learn how to create, update, and manage the various user types in **AccuClub**.

Import Members

Using an **Import** in which you must create a **.CSV** file with all the Members' data. using this method it will automatically have all your student data available to you. For more info visit the [Members Import](#) section.

Add Members Manually

Create New User

General information

First Name

Last Name

Email

Card Number

Password

Repeat

☒ Active

Postal address

Street Address

Profile Picture

Upload a file

Tags

Add...

Add Tag

- Doing it manually: To input your Members you must go to the Users section under General from the main menu. Once there, click the red **Create New** button and fill in the following info about

your student:

- **First Name** (Required)
- Middle Initial
- **Last Name** (Required)
- Email
- Card Number (Will default to ID if none specified)
- **Role** (Required)

Click the **Save** button to save your Members' data.

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.

View/Edit Classes

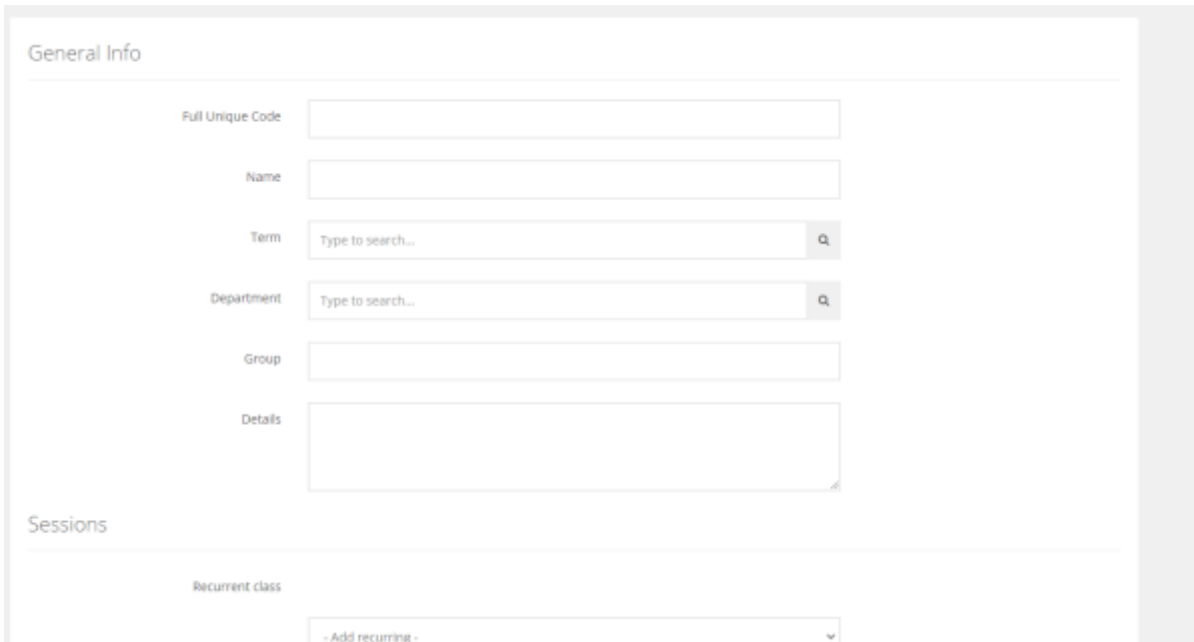
There are two ways to enter your Classes either manually or via import.

Import Classes

Using an **Import** in which you must create a **.CSV** file with all the **Classes** data. Using this method will automatically have all your **Classes** available in the system. For more info visit the [Classes Import](#) section.

Add Classes Manually

To manually enter the **Classes** and their Schedule, go to **Classes** under the **General** Section.



The screenshot shows a web form titled "General Info" for adding a class manually. The form contains several input fields: "Full Unique Code", "Name", "Term" (with a search icon), "Department" (with a search icon), "Group", and "Details" (a larger text area). Below the "General Info" section is a "Sessions" section, which includes a "Recurrent class" dropdown menu with the option "- Add recurring -".

To create a **Class**, click **Create Class** in red, and then fill in the following info:

- **Unique Code**: This can be anything that will uniquely ID the course. (Session MAT-101-01,CRN 0488-981,etc.)

- **Class Name:** Fill in the name of the Class.
- **Term:** Fill in the name of the semester the Class is occurring.
- **Department**(Optional): Fill in the Department. (English, Mathematics, Science, etc.)
- **Add Schedule:** Select the day of the week in the drop-down box to add days that the Class occurs. Adjust the times and set the **Location**. (A sample will be given if none have been created.)
- **Group**(Optional): Fill in the code used to group classes together (i.e. Math, Science, etc.).
- **Attendance:** Choose how many minutes you will allow Members to either **Sign-in Early**, or **Sign-out Late**.
- **Required Presence:** Choose a minimum percentage of attendance for Members to receive credit for attending this Class.
- **Require members to sign out:** Check this box to require Members to sign out to receive credit.

Click the **Save** button to save the data.

Delete Class

Click the **Delete** link on the far right of the Class you want to delete.

Be sure that you want to permanently delete the **Class** as **you will not be prompted** to confirm the deletion.

Locations

These are the locations that you'll be assigning to Classes and Sign-in Stations.

Add Locations

To manually enter the **Locations**, go to **Locations** under the **General** Section. To create a **Location**, click **Create Location**, and then fill in the following info:

General Information

Create New Location

General information

Name

Located in

Order

Locations with lower order values are displayed first.

☒ Active

Contact information

Email

Web site url

Street address

i.e. 7250 Red Bug Lake Rd, Ontario, United States

- **Location Name:** Fill in the name of the Location.
- **Located in:** This is a grouping for the Location.
- **Order:** This allows you to pick the Locations placement order on screen. Locations with lower order values are displayed first.

Contact Information

- **Email:** An optional field if there is an e-mail address for Members to contact the location.
- **Website URL:** This is an optional field if there is a webpage set up for this location.
- **Street Address** This is an optional field if there is a physical address for this location. Note: This is used with the AccuClub app.
- **More Information:** This is an optional area that can provide any important information that the Members may want to know about when booking an appointment with this location.
- **Access Restriction:** Check to restrict access to only certain users. The location will still be visible to everyone, but some related information will be hidden.

Click the **Save** button to save the data.

Delete Location

Click the **Delete** link on the far right of the **Location** you want to delete.

Be sure that you want to permanently delete the **Location** as **you will not be prompted** to confirm the deletion.

Reports

These are a list of the available reports in **AccuClub** with a brief description of what type of data they

show in each.

Credits

- **General stats:** Shows an overview of the membership plans.
- **Usage excess:** Lists the members that have used more than their credit.
- **Credits by user:** Lists the users and their current number of credits.

Session Registration

- **Registration and attendance:** Shows the registration and attendance for a specific session.
- **Event Registration and Attendance status detailed:** Shows the registration and attendance details for selected seminars.

Users

- **User List:** Lists all users in the system, including name, card number, and email address.
- **User List with Tags:** Lists all users in the system, including name, card number, email address, and tags.
- **Staff List:** Lists all staff members in the system, including name, card number, and email address.
- **Permissions by User:** Lists all the users in the system with their corresponding security permissions.

Visits

- **Location General Stats - Headcount:** Shows the general stats of a specific location counting users who are in the center at a given time.
- **Location General Stats - by Sign-In Times:** Shows the general stats of a specific location counting users only at their sign-in.
- **User Attendance:** Shows the attendance information of a member.
- **Summary of Attendance:** The report gives you a summary of the number of non-unique students seen and the total time.
- **Detailed Attendance:** Provides detailed information about students and their attendance. The report lists each student. Under the name, it lists the classes this student attended. For each class, the report lists the attendance sessions (sign-in date and time, sign-out date and time, and time spent).
- **New Visitors:** This report lists each new user to a service or location.
- **Session Comments:** This report shows comments on sessions. Note that this report only shows sessions with comments.
- **Visits Detailed by Location:** Lists each user that visited the location(s) during the reporting period. For each visitor, the report shows the number of visits, the date and time of his or her first visit, the date and time of his or her last visit, and the average visit time.
- **Visits Executive Summary:** The report gives you an executive summary of visits to a location, including the number of open days (any day with at least one sign-in is considered an open day), number of services offered, number of users served, and total contact hours.
- **Weekly Time:** Shows the time spent per user and event in a weekly distribution.

- **Weekly Visits:** Shows the number of visits per user and event in a weekly distribution.
- **Zero Visits:** This report lists each user that didn't visit your center during the reporting period.
- **Attendance Report by Topic:** This report lists visits by topic during the reporting period. A Topic can be location, event, service, instructor, staff, or student.
- **Attendance Summary Report by Topic:** This report lists the visit distribution summary by topic during the reporting period. A Topic can be location, event, service, instructor, or staff.

Text Messages

- **Text Messages Usage Detail:** Lists texting messages sent in detail.
- **Text Message Count by Carrier and Delivery Status:** Lists texting message counts distribution by carrier sent and delivery status.

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