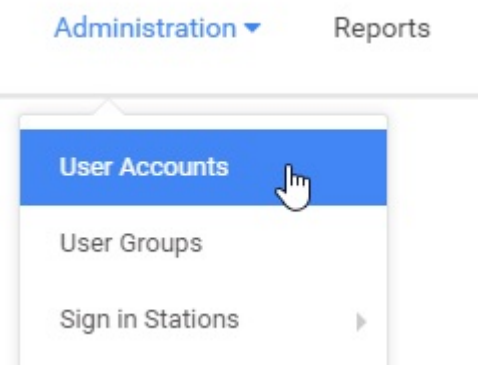




User Accounts

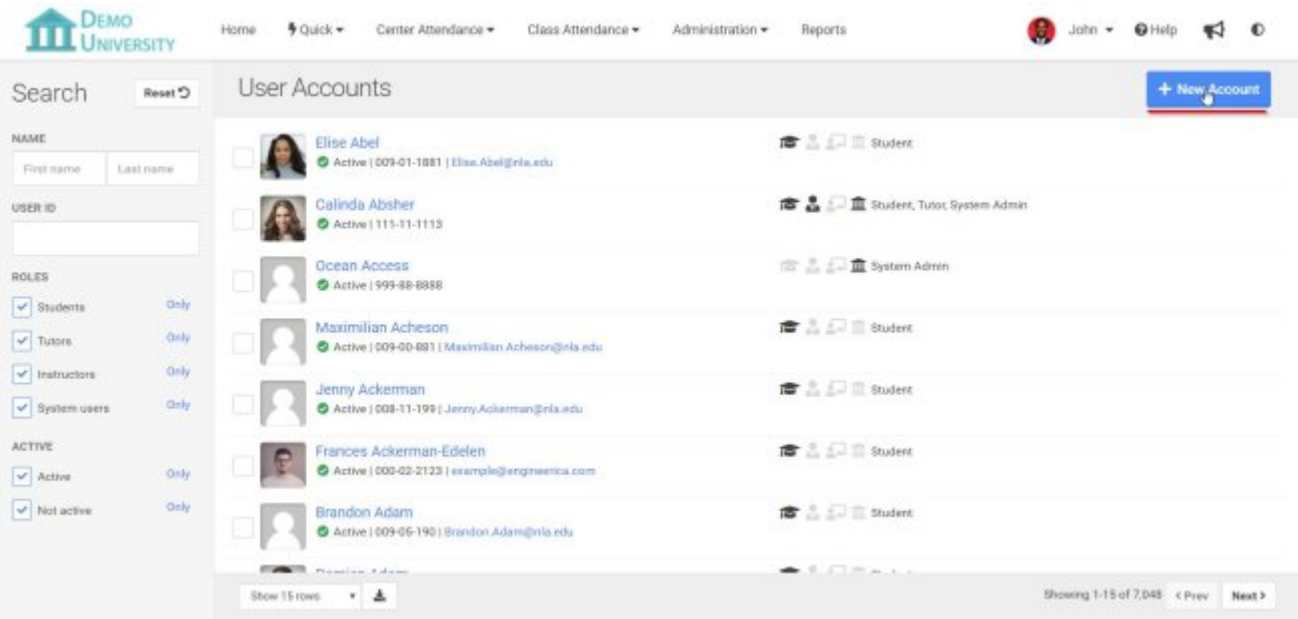
Purpose: To add, modify and search for **Students, Tutors/Staff, Instructors, System Users**, and **Student Groups**.

How to Access: *Administration > User Accounts*



Create User Account (General)

To add a new user, click on the **+ New Account** button.



General

- **First Name:** This is a required field that is stored as the Student's First name.
- **Middle Name:** This is an optional field that is stored as the Student's Middle name.
- **Last Name:** This is a required field that is stored as the Student's Last name.
- **Birthdate:** Use the Calendar icon to set the birth-date of this User.
- **Gender:** This optional field can be set to help ID your Student population by Gender.
- **Admin Notes:** Use this field to keep any permanent notes about the User.
- **Emails:** Use one of the following options to Add, Edit or Remove an Email Address for the user.
- **Phone Numbers:** Use one of the following options to Add, Edit or Remove a phone number for the user.
- **Addresses:** Use one of the following options to Add, Edit or Remove a Home Address for the user.
- **User Photo:** Use the Upload link to upload the User's photos to their profiles.

Security

- **User ID:** This assigns a unique ID to the User.
- **Secondary ID:** This is an optional second ID that can be assigned to the user.
- **Password:** This is the unique password that you want to give to the user.
- **Status:** Check or uncheck this option depending on if you want this user to interact with the system.
- **Roles:** This assigns the User to be a:
 - **Student** - Thie role is used to track their **Center Attendance** to the **Center**.
 - **Tutor** - Thie role is used to meet with Students and track work hours in the **Center**.
 - **Instructor** - Thie role is used to report visits by **Students** in the **Center**.

- **System User** - This role is used to manage **Center Attendance** to the **Center**.

ID number and the password is not needed for **Students** performing a sign-in to a center, it's only given if the student needs to login from home to set up an appointment.

Create Student Account

1. Simply complete the General information from [Create User Account \(General\)](#) above.
2. Next under the **Security tab** select **Student** in Roles. (There will be other tabs now shown like Student Enrollment)
3. Under **Student Enrollment** you can assign classes to a Student on a per semester basis. You can select a specific Term and Subject Area.
4. Once finished you can click on **Save Changes** and you'll be redirected to the User Account Dashboard.

Checkout this helpful [Student Quick Start Guide](#) if you would like to see the system explored through the eyes of a Student. This guide is available as a downloadable PDF for you to print and distribute to your Students.

Student Enrollment

1. First search for, select the **Student**, and edit the **Student**.
2. Then under the **Security tab** select student in **Roles**. (Two other tabs should open called **Profile** and **Enrollment**)
3. Under **Profile** you can customize the user's:
 - **Gender**
 - **Academic Assistance Program**
 - **Recommendation**
 - **Sports**
4. Under **Enrollment** you can enroll students in classes by selecting the **Term** and **Subject Area**
5. Once finished you can click on **Save Changes** and you'll be redirected to the User Account Dashboard.

Create Tutor Account

1. First complete the General information from [Create User Account \(General\)](#) above.
2. Next under the **Security** tab select Tutor in **Roles**. (Two other tabs should open called **Profile** and **Tutors Assignments**)
3. Under **Profile** you can customize the user's:
 - **Gender**
 - **Academic Assistance Program**
 - **Recommendation**
 - **Sports**
4. Under **Tutors Assignments** you can select a checkbox to allow a tutor to be assigned to all subject areas, if not then you can select a specific **Term** and **Subject Area**.
5. Once finished you can click on **Save Changes** and you'll be redirected to the User Account Dashboard.

Tutor Assignments

Here you can assign the **Subject Areas** that a tutor can assist with on a per semester basis. If you later schedule them to work in your **Center** they'll be able to select from these available **Subject Areas** when setting their [Tutor Schedule](#).

John Doeser

Discard Save Changes

General Security **Tutor/Skill Specialist Assignments**

☐ Tutor/Skill Specialist is assigned to all courses/skills

Only the courses/skills selected below are assigned to this user.

Semester: Fall 2019

Courses/Skills:

- Applied Math
- Applied Math II
- Calculus I
- Calculus 2
- College Algebra
- Elementary Algebra
- Intermediate Algebra
- mat-S
- Prealgebra

If you want your **Tutor** to be able to assist with all courses use that checkbox at the top.

Create Instructor Account

1. First complete the General information from [Create User Account \(General\)](#) above.
2. Next under the **Security** tab select Instructor in **Roles**. (One other tab should open called **Instructor Assignments**)

Instructor Assignments

1. First, search for, select the **Instructor**, and edit the **Instructor**.
2. Under **Instructor Assignments** you can assign classes to an Instructor on a per semester basis. You can select a specific **Term** and **Subject Area**.
3. Once finished you can click on **Save Changes** and you'll be redirected to the User Account Dashboard.

Checkout this helpful [Instructor Quick Start Guide](#) if you would like to see the system explored through the eyes of an **Instructor**. This guide is available as a downloadable PDF for you to print and distribute to your instructors.

Create System User Account

1. First complete the General information from [Create User Account \(General\)](#) above.
2. Next under the **Security** tab select System User in **Roles**.

3. Under **Roles** you will be able to edit the user's:
 - **Scope:** Allow you to limit the permissions given in the Role Group Template to only certain Centers, Location, or Groups
 - **Apply Template:**
 - **College Administrator:** Can manage all settings, users and centers in the college.
 - **Center Administrator:** Can manage the settings of one center.
 - **Student Administrator:** The user is allowed to create, edit, manage, and remove students.
 - **Tutor Administrator:** The user is allowed to create, edit, manage, and remove tutors.
 - **Instructor Administrator:** The user is allowed to create, edit, manage, and remove instructors.
 - **Permissions:** Accudemia lets a College Administrator create and modify each different User Role permissions.
4. Once finished you can click on **Save Changes** and you'll be redirected to the User Account Dashboard.

If the **System User** needs access to more than one area and the Institution's **Centers** and **Classrooms** have not already been grouped by locations you may have to give this user College-level access. The only alternative is to recreate the **Centers** (with all of their settings) into these *physical* or *logical* locations grouped using **Location Groups**. **Centers** and **Classrooms** can only be created/added to existing **Location Groups**. In other words, you cannot move a **Center** that already exists into a newly created **Location Group**.

Do not delete the old **Centers** if recreating them in a newly created **Location Group** simply inactivate them by unchecking the "active" checkbox when editing the **Center**. Inactivating **Centers** leave them in **Accudemia** for reporting but will not allow **Students** or **System Users** to interact or use it.







User Role Permissions







The following table shows the different **User Roles**. Accudemia lets a **College Administrator** create and modify each different **User Role permissions**.




*This icon represents **College-level** only settings.*

#	User Role	Description	Applies to...
1	SI Class Attendance Administrator	Can manage the presences and absences of the students.	Classrooms and Location Groups
2	Location Administrator	Can manage all locations in the user's scope	Centers, Classrooms and Location Groups
3	Student Sign Ins/Outs	Can make manual Student sign in and sign outs (mass sign-ins)	Centers and Location Groups
4	Tutor Sign Ins/Outs	Can make manual Tutor sign-in and sign-outs (mass sign-ins)	Centers and Location Groups

5	Account Administrator	The user is allowed to perform college wide operations (buy AccuCredits and manage technical contacts)	Centers and Location Groups
6	Appointments Administrator	Can create and view appointments for all users.	Centers and Location Groups
7	Create Semesters	Can create/edit semesters	 College-level
8	Create Sign-In Stations	Can create Sign In Stations for places	Centers, Classrooms and Location Groups
9	Create Surveys	The user is allowed to create, edit and remove surveys.	Centers, Classrooms and Location Groups
10	Edit Classes	The user is allowed to create, edit and remove classes.	Classrooms and Location Groups
11	Edit Subject Areas	The user is allowed to create, edit and remove subjects for the whole college.	 College-level
12	Edit Student Session Logs	Can edit Student Session Logs.	Centers and Location Groups
13	Edit Tutor Schedules	Can edit Tutor Schedules.	Centers and Location Groups
14	Edit Tutor Session Logs	Can edit Tutor Session Logs.	Centers and Location Groups
15	Edit Offtimes	Can edit place offtimes	Centers, Classrooms and Location Groups
16	Edit Profile Questionnaire	Can edit the profile questionnaire.	 College-level
17	Edit Settings	Can edit the Settings	Centers, Classrooms and Location Groups
18	Edit Terminology	Can edit the application terminology.	Centers and Location Groups
19	Email Templates Editor	Can edit the application terminology.	Centers and Location Groups
20	Export Data	Can export data college-wide	 College-level
21	iAccu Administrator	Can manage all iAccu devices of the college.	Classrooms, Centers and Location Groups
22	Import Data	Can import data college wide	 College-level
23	Intake System Administrator	Can manage the waiting lines in the Intake System.	Centers and Location Groups
24	Manage Instructors	The user is allowed to create, edit and remove only instructors.	 College-level

25	Manage Students	The user is allowed to create, edit and remove only students.	 College-level
26	Manage Tutors	The user is allowed to create, edit and remove only tutors.	 College-level
27	Manage Person Groups	Can create/edit Groups	Centers, Classrooms and Location Groups
28	Manage System Administrators	The user is allowed to create, edit and remove other **System Users** . But can only manage persons with the same or lower user rights.	Centers, Classrooms and Location Groups
29	Referrals Administrator	Can create/edit all options in the warning system (referrals)	 College-level
30	Referrals Issuer	Can create, edit, close, re-open, change the follower, and add comments to a referral in the warning system	 College-level
31	Send SMS	The user is allowed to send SMS	 College-level
32	Subscribe Subject Areas and Services	Can register courses and services to a place	Centers and Location Groups
33	Take SI Class Attendance	Can take attendance but not edit any class related information.	Classrooms and Location Groups
34	View "Daily Viewer" section	Can view the "Daily Viewer" for center attendance	Centers and Location Groups
35	View "Who Is In"	Can see currently signed in Students/Tutors	Centers and Location Groups
36	View SI Class Attendance Reports	Can only see reports which are related to SI Class attendance reports.	Classrooms and Location Groups
37	View Student Lists Reports	Can only see general reports that contains user lists.	 College-level
38	View Appointment Reports	Can only see reports which are related to Appointments (e.g. Appointment Schedule)	Centers and Location Groups
39	View Appointments	Can only view appointments	Centers and Location Groups
40	View (Center) Attendance Reports	Can only see reports which are related to attendance tracking	Centers and Location Groups
41	View Non-Anonymous Survey Results	Can see reports for surveys including student data.	Centers and Location Groups

42	View Registration Reports	Can see all reports related to Registration (e.g. Student Registrations, Course Registrations)	 College-level
43	View Session Logs	Can view session logs.	Centers and Location Groups
44	View Statistical Reports	Can only see general summarized reports	Centers, Classrooms and Location Groups
45	View Visits Reports	Can see all Reports related to visits (e.g. New Visitors, Visits History)	Centers and Location Groups

Searching for User Accounts

To find a specific user is fairly simple, you can find a menu in the right hand side of the page titled **Search**. You have several options to filter your search when searching for a user, you can use their:

Search

Reset

NAME

First nam

Last nam

USER ID

ROLES

☒ Students

Only

☒ Tutors

Only

☒ Instructors

Only

☒ System users

Only

ACTIVE

☒ Active

Only

☒ Not active

Only

First Name or Last Name
User ID
Role
Activity

Managing Users

 Deactivate

 Sign In Notifications

 Manage Roles

 Assignments

 Print QR Labels

 Appt Link

 Delete

Deactivate/Activate User

Inactive students are not allowed to sign-in.

To Deactivate/Activate a user you must follow the steps below:

1. Search for the student(s) that you are looking for.
2. select the student(s) by checking the **check-box** next to the users name(s).
3. A menu should pop up next to User Accounts, Click on **Deactivate/Activate**.
4. A pop-up meesage should appear on the right hand side of the screen saying: **User Updated.**

User Sign-In Notifications

The user sign-in notifications allow the user to receive an email when they sign in to a specific location.

To send **Notifications** a user you must follow the steps below:

1. Search for the student(s) that you are looking for.
2. Select the student(s) by checking the **check-box** next to the users name(s).
3. A menu should pop up next to User Accounts, Click on **Sign-In Notifications**.
4. A pop-up menu will appear and you will be able to select as many locations as you want for the user to get notifications from. you will also be able to put more than one email to send the notifications to.

Maximilian Acheson

Sign-In Notifications

Discard Save Changes

Send notification when the student signs-in to:

Location: ☐ All

- ☐ West Campus
- ☒ Math Center (West Campus)
- ☐ Writing Center (West Campus)
- ☐ Financial Aid & Registrar
- ☐ MaSH Center (Main Campus)
- ☐ Math Center (Main Campus)
- ☐ Music & Performing Arts Center
- ☐ Tutoring Center
- ☐ Writing Center
- ☐ A-101
- ☐ A-102
- ☐ A-103

Email addresses:
One per line

5. Click **Save Changes** to finish.

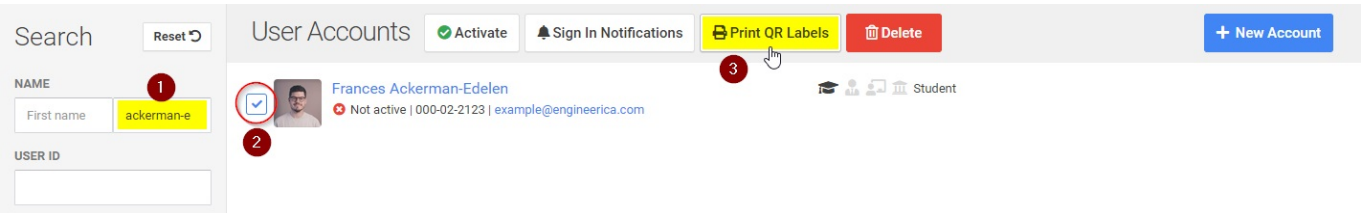
Manage User Roles

Print QR labels

There is a feature added to Accudemia that not too many people may know about and it is the ability to generate QR labels that can be printed on stickers for your students to be tracked by iAccu (the mobile companion app) in Accudemia.

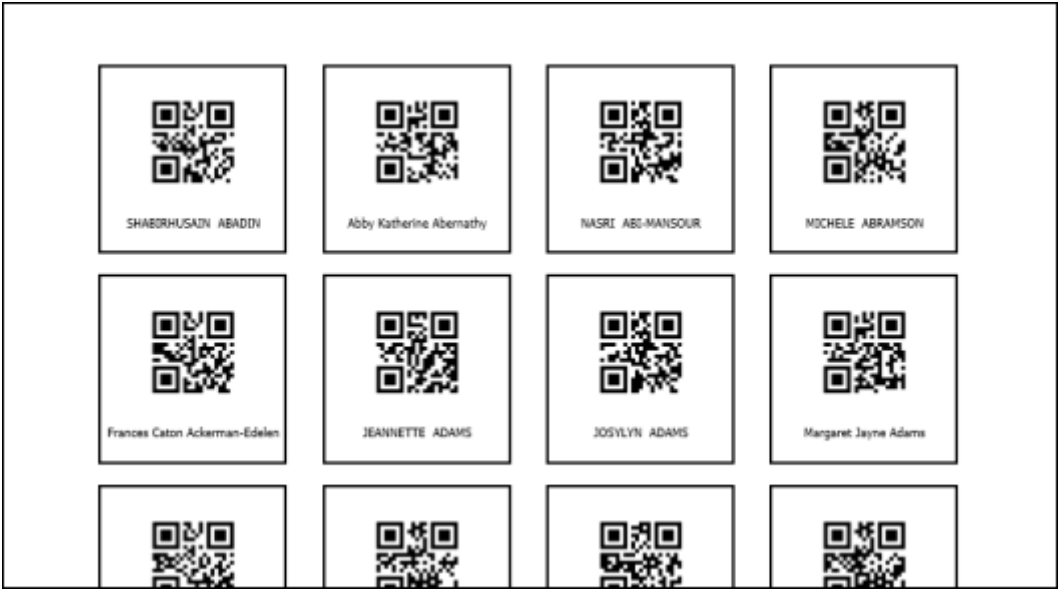
To print QR label you must follow the steps below:

- 1. Search for the student(s) that you are looking for.
- 2. select the students by checking the **check-box** next to the users name.
- 3. A menu should pop up next to User Accounts, Click on **Print QR labels**



If you notice at the top of the screen you have a **Print QR Labels** button. The Print Labels button if pressed now will generate labels for all of you students. However if you want to only generate the badges/labels for only several of the students you can enable multi-select and select the students before pressing the Print Labels button.

This feature can be used to generate labels for Instructors, Tutors, and System Admins as well.



Once the Administrator clicks the Print Labels button and accepts the confirmation, he or she will get a PDF containing all the requested labels. The PDF contains up to 24 square labels per page. We suggest that are best to be printed on:

[Avery® Easy Peel® White Square Labels \(#22805\)](#)

These badges/labels are great for producing a label for iAccu our mobile app for Accudemia. Using these barcodes, the iAccu app, and an Apple device will allow you to collect attendance for centers in many non-traditional locations.

Checkout this helpful [Student Manual](#) if you would like to see the system explored through the eyes of a Student. This guide is available as a downloadable MS Word DOC for you to edit as an admin to mold it to your login process through your portal if using SSO (Single Sign-On).

Appt Link (NEW)

Delete Users

To delete a person, first select them in the list by checking the check-box next to their name and then click the Delete button that pops up at the top of the page. After you click **Delete** you will see a confirmation message:

“Delete user Jenny Ackerman? If you want to keep the history for reports, the users can be made inactive instead deleting them.”

If you answer “Yes”, Accudemia will check the database to see if there are related records in other tables. If no related records exist, Accudemia will delete the student.

[Previous Article - Class Attendance: Referrals](#) | [Table of Contents](#) | [Next Article - Administration: User Groups](#)

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