This documentation refers to an old version of Accudemia 6.2 and has been replaced by Accudemia 7.0:
Accudemia 7.0 - Control Panel > Tracking Settings

Tracking Settings

This area of the **Control Panel** sets how users interact with Accudemia. It includes **General Settings** like maximum sign-in times, **Walk-in** options like what selections are available when signing in, **Appointment** options like how, when, where, and why they are scheduling appointments, and finally **Classroom** options that determine when a student is considered present or absent.

Throughout this guide this college icon will indicate a College-wide only setting. Meaning that you cannot set this setting at the Center-level and must decide among the Centers what setting you would like to use.

All settings in Accudemia shown with the **Default** notation on the far right-side are used as template values at the College-level for new Centers created after these are set. Not to worry though because these settings can be overwritten at the Center-Level as needed. You'll notice that most settings in this guide will have the **DEFAULT** icon to indicate they can be overwritten at the Center-level.

General

Purpose: This area defines general account settings such as calendar options, sign-in station options, and more. Some of these are *College-level* only but most can set at the individual *Center-level*.
How to Access: ***Administration*** > ***Control Panel*** > ***General***

Calendar

Purpose: To edit the calendar defaults in Off-times for the Center, College (All Centers) and Tutor schedules.
How to Access: *Administration > Control Panel > General > (select the College-level) > Calendar*

- **Period to Show:** Defines to display one or two weeks in the calendars.
- **First Day to Show:** Defines which day to be shown first in the calendars.
- **Blocks Per Hour:** Defines the amount of divisions inside the hour.
- **Start time:** Defines the time from which the calendar will be shown to the user. The start time should never be later than the opening time.
- **End time:** Defines the time till which the calendar will be shown to the user. The end time should never be earlier than the closing time.
- **Default Tutors Schedule Max. Attendees: X** Use this field to indicate what you want the default number of Students that can be seen with a Tutor on their schedule. This option eliminates the need to have everyone have to set this number individually or have your Center Admins have to constantly adjust this when setting schedules. The default number is 0 which indicates an unlimited number of Students can book Appointments at a time.

Intake System

Purpose: To configure how the Center displays the Tutors in the Intake System.
How to Access: *Administration > Control Panel > General > Intake System*

- DEFAULT **Tutor availability:** This option allows you to set the visible Tutors in the intake system for your **Center's Intake System**. Here are your options:
  - **Use Schedule Information** - This option shows only **Tutors** scheduled in your **Center**.
  - **Show Signed-in Only** - This option shows only **Tutors** signed-in at your **Center**.
  - **Show Everyone** - This option shows all **Tutors** in the **Accudemia** account (typically only used in a Single-Center license but may be helpful if the **Tutor** is technically available for more than one **Center**).

Miscellaneous

Purpose: To general options when creating new Tutors, Configuring automatic sign-outs for Students, and whether student names are displayed on the Sign-in Station/Kiosk.
How to Access: *Administration > Control Panel > General > Miscellaneous*

- **Associate tutors with all subject Areas:** Automatically associate tutors with all courses so that this is the default value for the setting in the New Tutor/User Accounts screen.
- DEFAULT **Maximum sign-in duration:** Sets the maximum time that a Student is allowed to be signed in.
- DEFAULT **When is longer than...:** It shows a customized message if the sign in duration is longer than X minutes.
- DEFAULT **Default sign-in duration: X mins.** This is set to the time you want to give them if limit is reached if different than the “Maximum sign-in duration.”
- DEFAULT **Show students names when signing-in/out at sign-in stations** Specifies whether students names should be displayed after they sign-in/out using a sign-in station.

Sign-In Options

Purpose: This section was setup to allow you to handle unknown students sign-ins which can be recorded or discarded.
How to Access: *Administration > Control Panel > General > Sign-in Options*

- DEFAULT **When a non existent student signs-in:** Allows to **save** or **discard** a session log, when the user is not in the college database.
- **Allow multiple services**: Specifies whether many or only one service can be selected. Check this checkbox if you want the **Student** to be able to choose more than one **Service** per sign-in.

This is useful if **Students** come to your **Center** for multiple **Services** and you want to track them but only have them sign-in and sign-out once. Realize though that this process also misconstrues your hours for the **Services** selected, therefore it is not recommended.

As a example, a Student comes in for “Tutoring” and “Computer Use” and stays for an hour. How much of that time was spent in “Tutoring”? And subsequently how much of that time was spent for

“Computer Use”? Accudemia has no choice but to give them an hour for each **Service** as we cannot determine the percentages spent in each of the **Services**.

Click here to see what these **Standby Logs** look like and find out more information.

Stations' Options

Purpose: To define the buttons displayed on the Center Sign-in Station/Kiosk.
How to Access: *Administration > Control Panel > General > Stations' Options*

- DEFAULT **Allow viewing tutors signed in:** Check this box if you want to display the “Tutors Who's In” button which shows the Tutors Who’s In screen.
- DEFAULT **Allow viewing students signed in:** Check this box if you want to display the “Students Who’s In” button which shows the Students Who’s In screen.
- DEFAULT **Allow new students:** Check this box if you want students who are not already in the Accudemia database to be able to first register, and then sign in. If this option is not checked, you can modify the default error message shown when a non-existing student tries to sign in on the Screen Captions tab.
- DEFAULT **Allow homepage access:** Check this box if you want all users to have access to login from the sign-in screen to their personal Accudemia homepage. You may want to disable this to avoid your center’s sign in screen being held up by users who are logged into their personal Accudemia homepage
- DEFAULT **Ask student whether to report visit to instructor** Check this option to show a confirmation message at students sign-in to ask them whether their visits should be reported to their instructors.

In the Student Who's in screen:

Purpose: This section allows you to choose the buttons that can be enabled on the Sign-in Station Kiosk.
How to Access: *Administration > Control Panel > General > In the Student Who's in screen:*

- DEFAULT **Show sign-in time**: Check this option to display the time the student signed in the center
- DEFAULT **Show course**: Check this option to display the course the student signed in for
- DEFAULT **Show tutor**: Check this option to display the tutor the student selected at sign-in

This area is in the admin panel and shows additional information on the “Who's In” screen. And this only will add these options to the Student screen as Tutors do not pick these options when signing in.

iAccu MDST

Purpose: This section allows you to control how Multi-Device Session Tracking is handled on your iAccu app.
How to Access: *Administration > Control Panel > General > iAccu MDST*

- **Multi-Device Session Tracking Settings** - Choose one of the two tracking methods for each option.
    - **When there's more than one swipe in the sign-in window for the same person:**

    - Count the first one as the real swipe
    - Count the last one as the real swipe
  - 🏛️ **When there's more than one swipe in the sign-out window for the same person:**
    - Count the first one as the real swipe
    - Count the last one as the real swipe

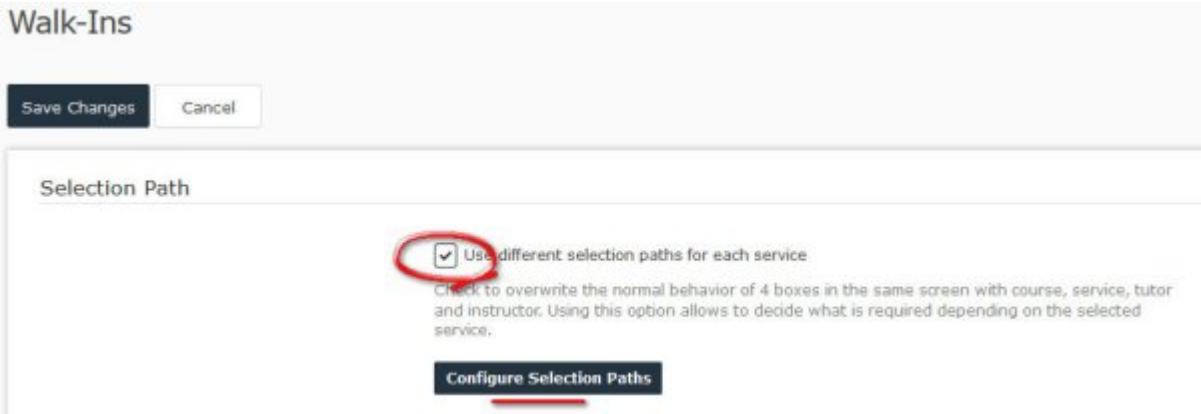
Walk Ins

Purpose: Customize your activity tracking screen during the **Student** sign-in process.
How to Access: ***Administration*** > ***Control Panel*** > ***Walk-ins***

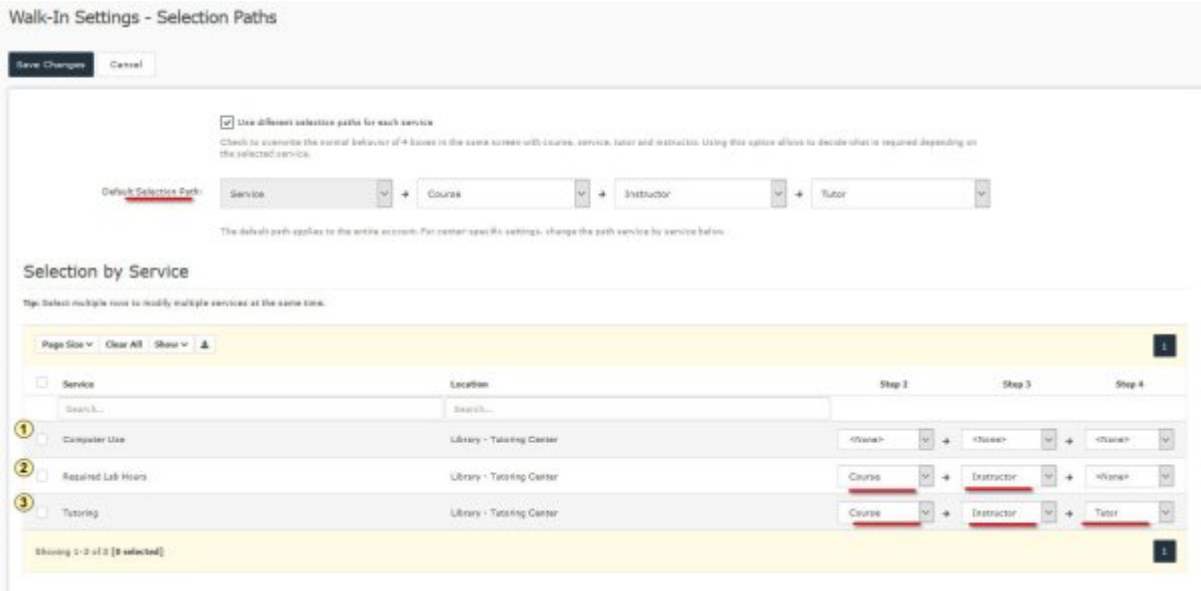
Selection Paths

Purpose: This is a new feature of Accudemia 6.2 that allows you select the order and options that the **Student** selects based on the selected **Services** for your **Center**. Each option will be presented on a separate screen based on the order selected.
How to Access: *Administration > Control Panel > Walk-ins > (Select the Center) > Selection Paths*

- DEFAULT **Use a different selection path for each Service** - To enable this option check the checkbox to *"Use a different selection path for each Service"*.



- DEFAULT **Configure Selection Paths:** When using the previous setting you can now set the selection order for each of the **Center**'s available **Services**.



In the screenshot above you can see the **Default order** at the top of the page or the option to select different selections based on the service at the bottom of that screen. For the latter option, when they set the different selections based on the **Service** the Student selects, you'll notice that each has a different selection option for the **Students** as stated below:

1. When the **Service** "*Computer Use*" is selected they are not prompted to select any other options.
2. When the **Service** "*Required Lab Hours*" is selected they are asked to choose their **Subject Area** and **Instructor**.
3. When the **Service** "*Tutoring*" is selected they are asked to choose their **Subject Area**, **Instructor**, and the **Tutor**.

If you choose not to use selection options…
All the options will appear on one screen when the **Student** selects why they are signing into the Center. And this is the default order that those items are displayed:

- **Subject Area** (top-left)
- **Instructor** (bottom-left)
- **Services** (top-right)
- **Tutor** (bottom-right)

Additionally, not all these options may appear if you chose the *"Do not show"* option on the individual items listed below in the next section of settings.

Services (Walk-ins)

Purpose: This section allows you to display the **Services** as an option to the Student or not.
How to Access: *Administration > Control Panel > Walk-ins > (Select the Center) > Services*

- DEFAULT **Selection**:
    1. **Required**: If you choose this option, the **Student** will be required to select a **Service** in order to complete the sign-in process.
    2. **Optional**: There will be a "None" option that appears in the **Services** list if it is not a requirement that they necessarily choose a Service at sign-in.
    3. **Do not show**: The **Services** list will not show during the sign-in process. Use this option

if the students will not be utilizing a service at your **Center** or if you are just recording the sign-in and sign-out times (like in a gym).

- DEFAULT **Default**: Choose which **Service** to show as default. This option is helpful if you would like to setup a **Service** as the default due to it being the most frequent **Service** being used.

Multiple Service selection options can be set in the **Control Panel** under ***General > Sign-in Options***.
Click here to learn more and visit that setting/section.

Subject Areas (Walk-ins)

Purpose: This section allows you to display the **Subject Areas** as an option to the Student or not.
How to Access: *Administration > Control Panel > Walk-ins > (Select the Center) > Subject Areas*

- DEFAULT **Selection**:
  1. **Required**: If you choose this option, the **Student** is required to select a Subject Area in order to complete the sign-in process.
  2. **Optional**: This option enables the "None" label to display in the **Subject Area** list. Choose this selection if your **Center** offers some **Services** that do not require a **Subject Area** to be selected during the sign-in process.
  3. **Do not show**: If you don't need to track the **Subject Area** that your **Students** are getting help with at your **Center** then choose the "Do not show" option. This is useful if you only want to track student's sign-in and sign-out time without tracking the **Subject Area** for their visit.
- DEFAULT **Default**: Choose which **Subject Area** to show as default. This is only helpful if you have a **Subject Area** that is constantly being chosen.
- DEFAULT **Use Student Enrollment**: Check this checkbox if you want to show only the **Subject Areas** the **Student** is registered this **Semester**. This will make the sign-in process a lot easier for the **Student** and typically can be maintained via automated imports using ADX nightly, hourly, weekly, or however frequent you choose.

Instructors (Walk-ins)

Purpose: This section allows you to display the **Instructors** as an option to the Student or not.
How to Access: *Administration > Control Panel > Walk-ins > (Select the Center) > Instructors*

- DEFAULT **Selection**:
  1. **Required**: If you choose this option, the student has to select an **Instructor** to be able to sign-in.
  2. **Optional**: The option "None" will appear in the **Instructor** list so the **Student** can choose this selection when the **Student** does not see an **Instructor** associated with his or her **Class**.
  3. **Do not show**: The Instructors list won't show during the sign-in process.

- DEFAULT **Use Registration Info**: Place a check this checkbox if you want to show only the registered **Instructors** for the selected **Subject Area**. Typically this option is helpful if you are getting this information imported.

If there is only one assigned **Instructor** to a **Class** and you are choosing to use the "do not show" option and check the "use registration info" checkbox, the **Instructor** will be automatically recorded

at sign-in.

Tutors (Walk-ins)

Purpose: This section allows you to display the **Tutor** as an option to the Student or not.
How to Access: *Administration > Control Panel > Walk-ins > (Select the Center) > Tutors*

- DEFAULT **Selection**:
  1. **Required**: If you choose this option, the **Student** is required to select a **Tutor** in order to be able to complete the sign-in process.
  2. **Optional**: The option “None” will appear in the **Tutors** list. Choose this selection if your **Center** offers self-study for example.
  3. **Do not show**: The Tutors list will not show during the sign-in process.

You have the option to show the available tutor a certain amount of minutes ahead of the current time. This allows for example a student who is signing-in a few minutes before the tutor is scheduled to see the **Tutor** and select the them.

- DEFAULT **Availability**:
  1. **Use Schedule Information**: Only the Tutors that are scheduled and assigned to work for the Subject Areas and Services will appear.
  2. **Use Registration Information**: Only the Tutors assigned to help in the chosen Subject Areas and Services will appear.
  3. **Show Everyone**: Show every active Tutor for the entire college.

- DEFAULT **Display at**:
  1. **Sign-In**: Prompts for tutor selection during sign-in.
  2. **Sign-Out**: Prompts for tutor selection during sign-out.
  3. **Sign-In (Allow selection at sign-out)**: Prompts for tutor selection during sign-in process, but allows students to select an “Unknown” tutor option (in case they don't know who'll they will see). If this “Unknown” tutor is selected Accudemia will then allow them to choose from the list of Tutors again during sign-out process.

Guest Sign-ins

Purpose: This section allows you to enable the **Guest** option for Non-Students or guests.
How to Access: *Administration > Control Panel > Walk-ins > (Select the Center) > Guest Sign-ins*

- DEFAULT **Allow guests to sign-in**: Enabling this will allow guest users to walk-in.
- DEFAULT **Guest user ID**: This is the ID that will be assigned to the Guest User. When a guest signs-in for the first time a person will be created. The name of the person will be “Guest User”. You'll be able to filter reports by this person. Manual sign-in is also possible using this person.
- DEFAULT **Sign-in time for guests**: Here you should specify the period (in minutes) that the guest is given by default for this **Center** visit.

Guests do not need to sign-out as Accudemia automatically gives them the default sign-in period specified above.

Miscellaneous (Walk-ins)

Purpose: This section allows you to display a *pop-up confirmation* to the Student or not.

How to Access: *Administration > Control Panel > Walk-ins > (Select the Center) > Miscellaneous*

- DEFAULT **Require confirmation before signing-in**: If checking the checkbox, the **Student** will see a message to confirm all the selected items are correct before completing the sign-in process.

Appointments

Purpose: Customize your appointment restrictions and scheduling process.
How to Access: ***Administration*** > ***Control Panel*** > ***Appointments***

When you access this area you'll be asked to select the **Scope** of what locations do these appointment settings and option apply. Appointment options are broken into several sections of settings that you can change from the defaults:

Status

- **Disable appointments scheduling** - Use this option to disable appointments until you are ready to use them.

This setting is unlike most in Accudemia's **Control Panel** as it follows these rules instead of the norm of overriding the College-level at the Center-level:

- At college-level, it disables the Appointments module for the entire system (menu item will disappear).
- At center-level, it just prevents Appointment Schedulers (Appt. Wizard, New by Tutor, & New by Date) from showing the Center you selected.

Instructors

Used to set **Instructors** as an option to choose when setting up appointments.

- **Instructor** - Set the option below based on your center's needs for Instructors to be reported to about Appointments. Select from the following options:
  - *Optional:* Allow **Students**to select a **Instructor**, but does not force them to do so.
  - *Required:* Force **Students**to select a **Instructor** when creating new appointments.
  - *Do not Show:* **Students** will not be asked to select an **Instructor**.
- **Use registration information:** Allows you to only display their **Instructors** based on **Classes** they are enrolled into at the moment.

Subject Areas

Used to set **Subject Areas** as an option to choose when setting up appointments.

- **Subject Areas** - Set the option below based on your center's needs for Subjects to be reported on Appointments. Select from the following options:

    - *Required:* Allow **Students**to select a subject area, but does not force them to do so.
    - *Optional:* Force **Students**to select a subject area when creating new appointments.
    - *Do not show:* **Students**will not be asked to select a subject area.
- **Default:** Choose which **Subject Area** will be selected by default.
    - **Use student enrollment:** Allows you to only display their **Subject Areas** based on **Classes** they are enrolled into at the moment.

Services

Used to set the **Services** as an options to choose when setting up appointments.

- **Services** - Set the option below based on your center's needs for Services to be reported on Appointments. Select from the following options:
    - *Optional:* Allow students to select a service, but does not force them to do so.
    - *Required:* Force students to select a service when creating new appointments.
    - *Do not Show:* Students will not be asked to select a service.
- **Default:** Choose which service will be selected by default.

Default Screen

- 🏛 **New appointment default screen**

Appointments Restrictions

To set range of time to schedule appointments.

- **Prevent users from handling appointments:**
    - **Prevent students from scheduling appointments** - This option allows you to stop students from scheduling appointments with your center.
    - **Prevent users from cancelling appointments starting less than *X* minutes ahead** - This option stops students/tutors from cancelling appointments ***X*** minutes before the appointment start time so they give the other person enough time to know they cancelled.
    - 🏛**Prevent students from cancelling, restoring and re-scheduling appointments** - This disables the ability for students to make changes to appointments that are scheduled.
- 🏛 **Tutors load balancing:**
    - **Hide tutors' names from students when they make appointments** - This option allows you to hide the not show the names of tutors when students schedule appointments so favorite tutors are not being bombarded with students.
- **Allow creating appointment:**
    - **No less than *X* days, *Y* hours and *Z* minutes ahead** - This setting defines the least amount of time necessary to setup an appointment before the start of the appointment.
    - **No more than *X* days ahead** - This setting defines how far out a user can setup an appointment.
    - 🏛 **In future terms** - This allows appointments to be made in future semesters or terms.
    - **If the student does not have one with the selected staff in the selected day** - This setting makes it so that an appointment can only be made with the same student

and tutor once per day.
    - **Starting every *X* minutes from *[time]* to *[time]*** - This setting defines the hours that Appointments can be made in your center and the increments that they can start. If the increment is set to 15 minutes for example you could make appointments on the hour, 15 minutes after the hour, 30 minutes after the hour, and 45 minutes after the hour each hour that is specified in the time range.
- **Maximum hours per week:**
    - **Staff: *X* hours** - This is the maximum number of hours a staff member can be scheduled for appointments per week.
    - **Students: *X* hours** - This is the maximum number of hours a student can be scheduled for appointments per week.
- **Maximum number per week:**
    - **Staff: *X* visits** - This is the maximum number of appointments that can be scheduled with each staff member per week.
    - **Students: *X* visits** - This is the maximum number of appointments that can be scheduled with each student per week.
- 🏛️ **No-show restriction:**
    - **Prevent creation with a student with more than *X* not voided no-shows in *Y* days** - This setting is how you want your College to handle Appointment No-Shows. X is the number of no-show occurrences and Y is the number of days that have passed before these occurrences reset.
- 🏛️ **Back-to-back restriction:**
    - **Prevent creation of back-to-back appointments with the same or an unspecified subject area until *X* minutes have passed** - This setting is how you want your College to allow setting back-to-back appointments.
- **Duration restriction:**
    - **The minimum appointment length is *X* minutes** - This defines the shortest appointment time length an appointment can be made for a visit.
    - **The maximum appointment length is *X* minutes** - This defines the longest appointment time length an appointment can be made for a visit.
    - **The default appointment length is *X* minutes** - This defines the standard appointment time length an appointment can be made for a visit and will be set to this value when scheduling appointments by default.
- **Count visit towards appointment if sign in is:**
    - **Early by *X* minutes** - This defines the start of the window that a student will be counted as showing up for the appointment when they sign-in at a Sign-in Station.
    - **Late by *X* minutes** - This defines the end of the window that a student will be counted as showing up for the appointment when they sign-in at a Sign-in Station.
    - **And stays signed in for at least *X* minutes** - This defines how long a student must stay signed in to be counted as showing up for the appointment when they sign-in at a Sign-in Station. This will prevent students from quickly signing in and out for an appointment and leaving the center.

If you wish to have your students not sign-out for appointments then uncheck this option.

- 🏛️ **Group appointments:**
    - **Tutor can assist with different subject areas** - Set if tutors at the college can help in different subject areas during the same time slot.
- 🏛️ **Allow only the following days:** - Place a check next to whichever days you want to have appointments be available at the college.

Contact Information Update

- **Students must confirm their contact information once every X days** - Place a check next to this option if you want your **Students** to confirm or update their contact information in Accudemia. This also gives them the opportunity to add a Cell phone number if they would like to be notified via SMS text messaging regarding appointments and other notifications in the system. X is the number of days that can pass without them having to update this information.

Email Notifications

Enables users to receive confirmations and reminders via emails and allows you to set the amount of time before the appointment they will receive this message.

- **Send reminder X hours before the appointments start** - Check this option if you would like an email reminder to be sent to your students prior to the appointment time. X is the number of hours prior to the appointment that you would like them to be reminded. The 2 hour time-frame is set by default.
- 🏛 **Send confirmation by email** - Choose whether the **College/Insitution** will send a confirmation email when someone creates a new appointment.
- 🏛 **Send an iCalendar with appointment information attached to the confirmation email** - The **College/Insitution** will select this option if they would like their **Students** and **Tutors** to receive an iCal appointment reminder that is compatible with MS Outlook, Google Calendar, other popular calendar applications.

This settings uses the users primary email address.
Each user can disable this behavior by accessing the My Settings section when they are logged in.

SMS Notifications

- **Send reminder X hours before the appointments start** - Check this option if you would like an SMS reminder to be sent to your students prior to the appointment time. X is the number of hours prior to the appointment that you would like them to be reminded. The 2 hour time-frame is set by default.
- 🏛 **Send confirmation by SMS** - Choose whether the **College/Insitution** will send a SMS confirmation message when someone creates a new appointment.

This feature allows to send SMS notifications for upcoming appointments. You need to purchase AccuCredits to enable this feature. Learn More.

Return to Appointments section.

SI Class Attendance

Purpose: These settings dictate how you handle **Class** attendance at the *College-level* or *Classroom-Level*.
How to Access: ***Administration*** > ***Control Panel*** > ***SI Class Attendance***

- 🏛 **Tolerances**

  - **Tardy period:** *X* minutes - Where X is the amount of minutes that the students is considered “Tardy.” If you want the Students to be on time but allow them 5 minute grace period this is where you would place that number otherwise leave 0.
  - **Cut-off period:** *X* minutes - Where X is the amount of minutes that the students is considered “Cut-off.” If you want the Students to be counted as absent after a given time period even if they show up this is where you would place that number. This number should be greater than or equal to the “Tardy” period.
  - **Duration:** *X* minutes - Where X is the amount of time most classes duration are so that when you create a new class instance it is given this default amount this time.
  - **Allow students to sign in early by:** *X* minutes - Where X is the amount of minutes that the students is allowed to sign-in before the actual time the class starts. If you want the Students to promote promptness then it would be nice to give them a 15 minute period. This can be set to as low as 5 minutes.

If a particular class does not want these rules to be followed you can manually override them when creating the class itself. More information available in Has Scheduled Classes section of Subject Areas. As well students do not have to Sign-out from class as it gives them the end of the class time as the Sign-out time.

- 🏛 **Referrals**
  - **Show only classes of the current term** (enabled by default)
- Unresolved Sign-Ins: Customize actions when there is an unresolved log.
  - **When a student not registered signs in to a class:**
    - Reject and discard
    - Record in standby
    - Record sign-in
    - Record sign-in and register automatically
  - **When encountering a sign-in when there is no class:**
    - Reject and discard
    - Record in standby
  - **When encountering duplicated sign-ins in the same class session:**
    - Reject and discard
    - Record in standby
  - **When encountering multiple classes at the same time:**
    - Reject and discard
    - Record in standby
    - Record sign-in based on enrollment info
- 🏛 **Schedule Customization:** Set the days that your college offers classes.

Previous Article - Control Panel | Table of Contents | Next Article - Website Settings

From:
http://www.attendance-tracking.com/docs/ - **Engineerica Documentation**

Permanent link:
http://www.attendance-tracking.com/docs/doku.php/accudemia/manual/trackingsettings

Last update: **2020/01/10 08:46**