# **ACCUTRACK SYSTEM SETUP OPTIONS**

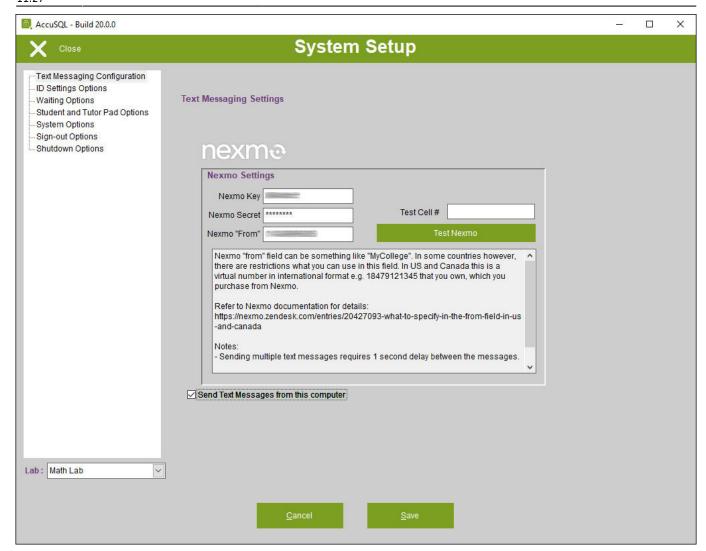
**Purpose:** These options help configure some of the basic system settings needing to be established early in the setup process.

**How to Access:** If you click **System** from the main **System Administration** screen, then select **Setup**, you will be presented with a **System Setup Options** view that shows context-specific options for your System screens. Here are the Control Panel options for System Setup:

- **Text Messaging Configuration** Used to set up the text messaging information that will be used to send text messages in **AccuSQL/AccuTrack**.
- **ID Settings Options** Used to set up the ID length and mask parameters for the people that will be logging into **AccuSQL/AccuTrack**, either as students, tutors, or administrators.
- Waiting Options Used to enable either an intake queue or an activity waiting list in AccuSQL/AccuTrack. Using these methods, students sign in and then are placed in a waiting queue until they are ready to be seen by available staff.
- **Student and Tutor Pad Options** Used to display or hide the Student and Tutor Pad buttons on the main sign-in screen.
- **System Options** Used to configure software updates, startup settings, and various system display settings.
- **Sign-out Options** Used to set up rules for log in display statistics, and how to handle students that forget to sign out.
- **Shutdown Options** Used to set up rules that run at for system shutdown.

## **TEXT MESSAGING CONFIGURATION**

**Purpose:** Used to setup Nexmo configuration to allow SMS Text messaging to occur. **How to access:** Click **System** in **System Administration** screen, then the **Setup** tab. On the left side of the screen, click **Text Messaging Configuration** if not already selected.



#### **AccuSQL/AccuTrack** can utilize text messaging in several ways:

- To send appointment reminders texts to students.
- To send text messages to students and tutors via the Messaging Center.
- To send text messages to students from the intake system or the activity waiting list.

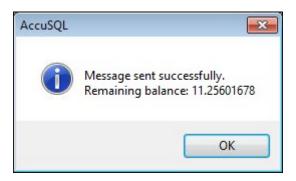
Use this screen to set up the service you are using to deliver text messages to your students and tutors. Due to its, reliability, affordability, and secure transmission protocol, we use Nexmo services. When you create an account with this provider, you will be given the access information you will need to enter into the SMS Configuration screen. To find out more you can visit www.nexmo.com. If you intend to enable text messaging right away, select the Send Text Messages from this computer to enable the messaging and click Save.



### **Testing Nexmo**

After you enter the 3 required fields (the Nexmo Key, Nexmo Secret, and Nexmo From information which is provided by Nexmo after you have created a valid account) you can enter your own cell number (make sure to add a 1 in front of it) to test the SMS text messaging.

After you click the **Test Nexmo** button, you should see a pop-up message indicating the message was sent and you should also get a text message on your phone for the number you entered.

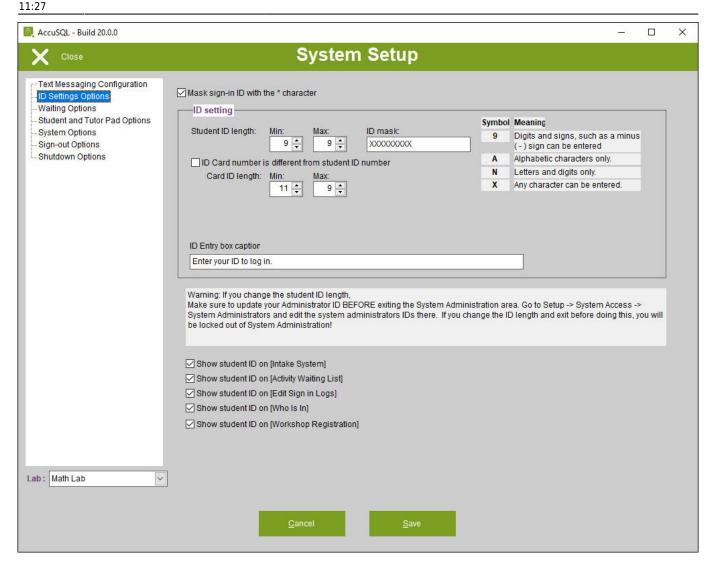


If you get a different message, check your Nexmo settings and retry. You may also want to check with IT to make sure there is no security or firewall policy in place that will prevent the outbound SMS traffic.

# **ID SETTINGS OPTIONS**

**Purpose:** This section was created to determine the format used for the **Students**' ID or Card Number

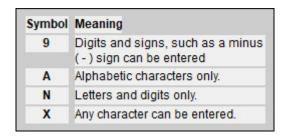
**How to Access:** Click **System** in **System Administration**, then the **Setup** tab. On the left side of the screen, click **ID Settings Options**.



Use the ID Setting box to set up the format of the sign-in ID in **AccuSQL/AccuTrack**. **AccuSQL/AccuTrack** even allows you to have variable ID length – from 4 up to 40 characters long. With this powerful feature, your sign-in ID can even be an email address.

To specify the format of the sign-in ID, start by setting the minimum and maximum allowable ID length. For example, if your student ID can be 5, 6, or 7 digits long, then set the minimum to 5 and the maximum to 7. On the other hand, if your ID length is fixed, then set both the minimum and maximum to the same value.

Next, you will need to set the student ID mask. The mask is useful in controlling the ID entry. Here are the accepted symbols for the input mask:



In addition to specifying the type of the input character, you can also use special symbols like '-' and '('. These characters serve as a separator and are not recorded as part of the sign-in ID itself. For

example, the mask of the social security number format is "999-99-9999".

**AccuSQL/AccuTrack** also allows you to use two IDs per student. This is useful for example if you want students to sign in with either a card ID number or a student ID number. They can swipe their ID cards to sign in with their college ID card, or they can type their student number if they forget their ID card. This screen allows you to configure the format of both IDs to match the ones you use at your center.

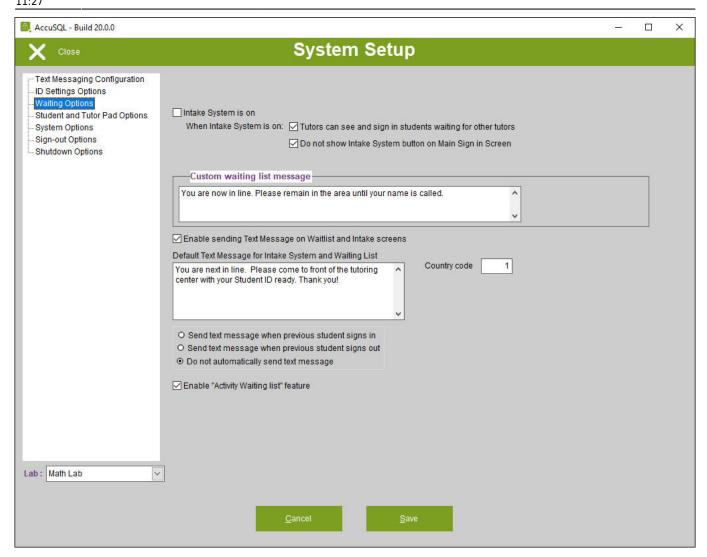
- LID Card number is different from student ID number: If you want to use two different IDs per student, check this box. On the other hand, if you only want to use a student ID number, clear this box.
- **Card ID length:** If you check the above box, enter the minimum and maximum number of characters of the card ID using this spinner box. The minimum value must be at least 4 characters and the maximum value can be up to 40 characters.
- **ID Entry box caption:** Use this box if you want to change the instruction line above the ID Entry box. This will enable you to give the visitors specific instructions on which ID number to use.
- **Show student ID on X:** Check these boxes to display the student ID on the various screen indicated.

**Warning!** If you change your ID setting, you must make sure that your Root administrator's ID matches that format or you will lock yourself out of **AccuSQL/AccuTrack**. When you change the format, a warning message will be displayed. Make sure you go to the **Users > System Administrators screen** and update your system administrators' IDs to match those in your ID Settings.

### **WAITING OPTIONS**

**Purpose:** These settings allow you to configure a waiting line for your Center.

**How to Access:** Click **System** in **System Administration**, then the **Setup** tab. On the left side of the screen, click **Waiting Options**.



**Intake System is on:** Check this box if you want to enable the intake system for student sign-ins. Using this feature, students are put in the waiting list at sign in and then can be signed in by either tutors or administrators when they are ready to be seen.

When Intake System is on Tutors can see and sign in students waiting for other tutors: Check this box if you want tutors to see students waiting for all other tutors. If left unchecked, tutors will only see students waiting for them.

**Do not show the** Intake System **button on Main Sign-in Screen:** Check this box if you want to hide the Intake System button from the main sign-in screen. This can be useful if students are signing into sensitive activities and you do not want students to see what other students are waiting for. Custom waiting list message: Enter the message students will see after they sign in to indicate to them they are now on the waiting list (if Intake System is set to on).

**Enable sending Text Message on Waitlist and Intake screens:** Check this box if you want students to get a text message when they are signed in from either the Intake Queue or the Activity Waiting List. Text Messaging is set up in the **Communications > Setup > Text Messaging Configuration** screen.

**Country Code:** Leave set to 1 if you are in the U.S or Canada. If in another country, enter the dialing code for that country.

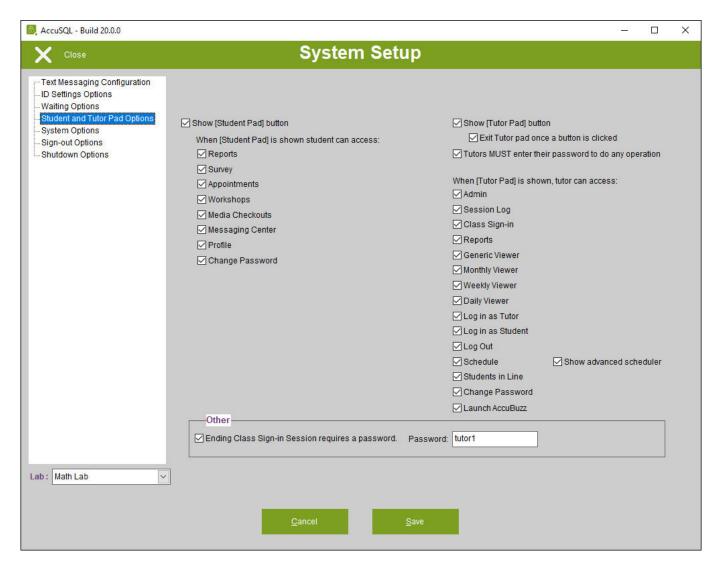
Default Text Message on Intake System and Waiting List screens: Enter the text message that

you want to send to students when they are ready to be signed in from the Intake System or Activity Waiting List. If you select this option, then click the radio button for when you want that message delivered.

**Enable Activity Waiting List feature:** Check this box if you want to turn on the Activity Waiting List for student sign-ins. Remember, the Activity Waiting List controls the maximum number of students that can be signed into a particular activity at the same time. This can be done on a per activity basis.

### STUDENT AND TUTOR PAD OPTIONS

**Purpose:** Use this section to configure the buttons that will appear on the Student Pad and Tutor Pad. **How to Access:** Start by clicking **System** in **System Administration**, then the **Setup** tab. On the left side of the screen, click **Student and Tutor Pad Options**.

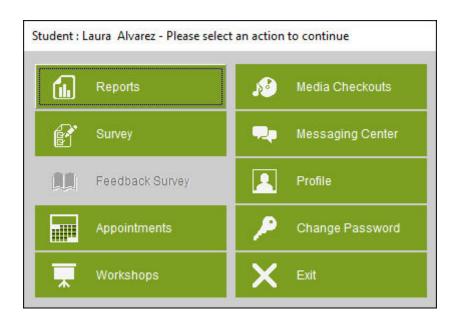


The Student and Tutors Pads can appear on the main sign-in screen if you so desire by clicking the Show Student Pad button and/or Show Tutor Pad button. When students and tutors sign in, they will have access to the options you select.

**Note:** When a tutor signs in, they will automatically be presented with the **Tutor Pad options** you select.

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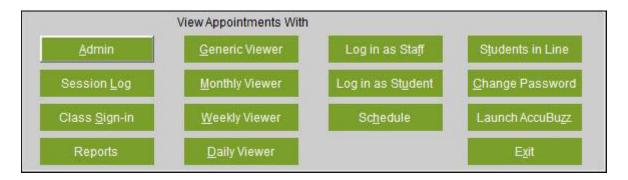
- **Show Student Pad button:** Click to display the Student Pad on the main sign in screen.
- **Reports:** Allows students to view reports for their visits and appointments.
- Survey: Click to allow students to fill out any custom surveys you have defined and published.
- **Appointments:** Click to allow student to create, view, or cancel appointments.
- **Seminars:** Click to allow students to register for seminars.
- **Media Checkouts:** Click to allows students to check out and return media items.
- Messaging Center: Click to allow students to send messages via AccuSQL/AccuTrack or email to tutors.
- Profile: Click to allow student to update their information on their student record.
- **Change Password:** Click to allow students to change their password. Passwords are used to access the Student Pad and also when scheduling appointments via Web Gateway.



The Tutor Pad has the following buttons:

- Show Tutor Pad button: Click to display the Tutor Pad on the main sign in screen.
- Exit Tutor pad once a button is clicked: If checked, the Tutor Pad will close after the tutor selects an option.
- Tutors Must enter their passwords to do any operation: If clicked tutors will be required to enter a password to access the Tutor Pad options.
- **Admin:** If the admin gives the tutor access to the administration screen, this button will be enabled. Clicking on it will take the tutor to the System Administration screens they are allowed to access based on the Tutors Access Group options you have enabled.
- **Session Log:** Click to allow tutors to launch the Session Log screen where tutors enter notes and fill out session questionnaires for the tutoring sessions.
- Class Sign-in: Click to enable class sign-in sessions.
- **Reports:** Allows tutor to generate reports as determined by the Reports Access for the Tutors access group.
- **Generic Viewer:** Click to allow tutors to launch a generic appointment viewer.
- Monthly Viewer: Click to allow tutors to launch a monthly appointment viewer.
- Weekly Viewer: Click to allow tutors to launch a weekly appointment viewer.
- Daily Viewer: Click to allow tutors to launch a daily appointment viewer.
- Log in as Tutor: Click to allow tutors to sign in as a tutor so you can track their work hours.

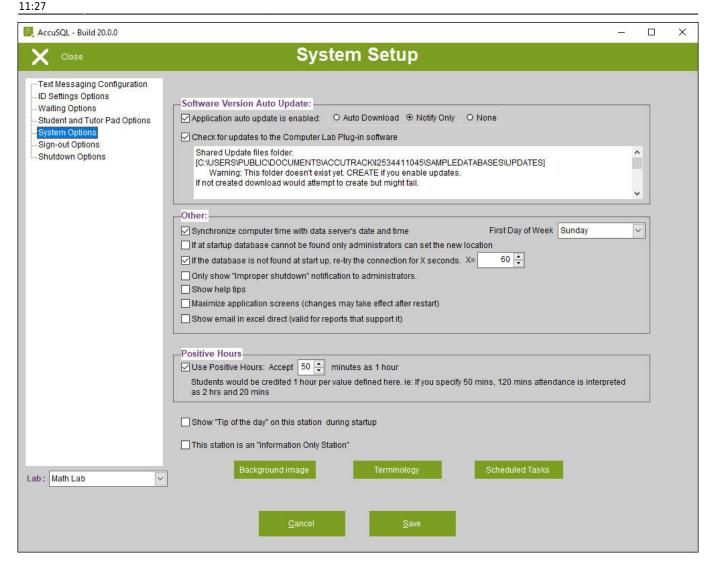
- Log in as Student: If the tutor is also entered as a student, click to allow the tutor to sign in as a student.
- Log Out: Click to allow tutors to sign out from the Tutor Pad.
- **Schedule:** Click to allow tutors to display their schedules and allow them to create their own custom schedules.
- **Students in Line:** If Intake System is turned on and admin allows it, click to allow tutors to see students waiting to see them and to sign the students in.



### **SYSTEM OPTIONS**

**Purpose:** To setup the System-wide settings used by the Centers.

**How To Access:** Click **System** in **System Administration**, then the **Setup** tab. On the left side of the screen, click **System Options**.



## **Software Version Auto Update**



If the Application auto-update is enabled box is checked, **AccuSQL/AccuTrack** will periodically check for free maintenance upgrades via the Internet. If a maintenance upgrade is found, **AccuSQL/AccuTrack** will ask whether you want to download it. Click on "Yes" to download and upgrade your software.

**Note:** We strongly recommend that you turn auto-update on. This will keep your software up-to-date with the latest fixes and enhancements.

When **AccuSQL/AccuTrack** downloads the upgrade, it will place a copy of it in a common folder (the same folder that has your application shared path). The path and name of this folder appears in the

screenshot above. This is useful in shared network installation because only one of the **AccuSQL/AccuTrack** installations needs to download the update file. It will then place a copy in the common update folder, and the other installations will update themselves with this file instead of downloading it again.

**Note:** If you have not created and UPDATES folder in the application shared path, then we recommend you do so. **AccuSQL/AccuTrack** will attempt to create the folder when updates are downloaded but may fail if you have not created the folder first.

#### Other:

Other:			
Synchronize computer time with data server's date and time	First Day of Week	Monday	,
If at startup database cannot be found only administrators can set the new l	location		-23
☑ If the database is not found at start up, re-try the connection for X seconds.	X= 60 ÷		
Only show "Improper shutdown" notification to administrators.	1 <del>1                                   </del>		
☑ Show help tips			
Maximize application screens (changes may take effect after restart)			
Show email in excel direct (valid for reports that support it)			

**Synchronize computer time with the data server's date and time:** This option is useful in shared network installations. If checked, **AccuSQL/AccuTrack** will update the clock of the computer it's running on by synchronizing it with the date and time of the server.

**First Day of the Week:** Use this option to select your first day of the week. This selection is used for some of the reports and when calculating the sign-out statistics (yellow box).

**If at startup the database cannot be found, only the administrator can set the new location:** Check this option if you want to password-protect the ability to change the database location from the sign-in computers. Note: This option does not apply to **AccuSQL/AccuTrack**.

If the database is not found at start-up, re-try the connection for X seconds: Check this option to re-try connection to a database for a specified (X) number of seconds if it cannot be found upon startup.

**Only show the "Improper" shutdown notification to administrators:** Check this option if you want to display the "Improper Shutdown" message to administrators only. If this option is not checked, the "Improper Shutdown" message will be shown at the launch.

**Show help tips:** Help tips appear when you leave the mouse pointer on a control for a few seconds.

**Maximize application screens:** Click if you want to maximize the Administration screens in **AccuSQL/AccuTrack**. Note: The main sign-in screen is maximized by clicking the "Run in Kiosk mode" checkbox in the Sign-in Setup » Setup » Welcome Screen Options on a per-machine basis.

**Use Positive Hours: Accept X minutes as 1 hour:** This option was added at the request of colleges in California. These colleges count student attendance in positive hours. A positive hour is defined as 50 minutes of attendance time. However, **AccuSQL/AccuTrack** allows you to define the positive hours in different actual minutes too using the spinner box. If you want to use actual hours for student attendance, uncheck this box.

**Note:** If this option is on, positive hours are shown in reports and when students sign out.

Show "Tip of the day" on this station during startup: Check to display a random usage tip when AccuSQL/AccuTrack starts.

### **Background Image**

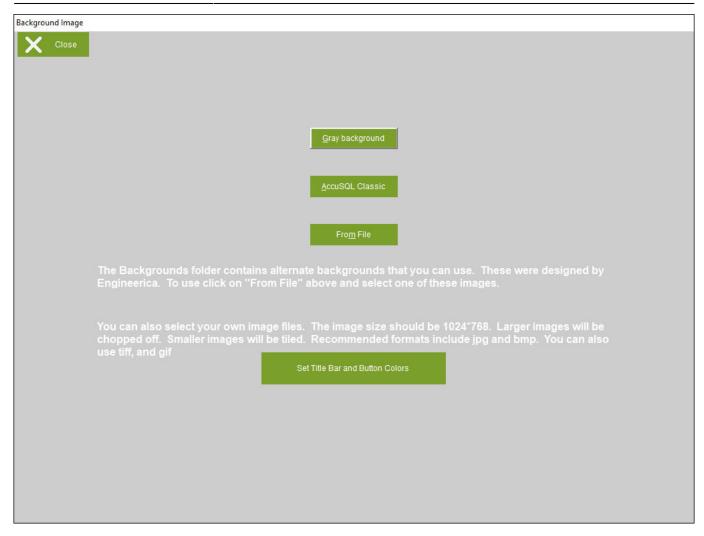
Click this button if you want to change the background image for the **AccuSQL/AccuTrack** screens. There are 3 options available:

- 1. Gray background (recommended): Clicking this option uses the default graphical background from **AccuSQL/AccuTrack** screens.
- 2. AccuSQL/AccuTrack Classic: This option loads the default AccuSQL/AccuTrack Version 12 background.
- 3. From File: This option allows you to browse and select an image file for the background. This allows you to customize the background to your liking.

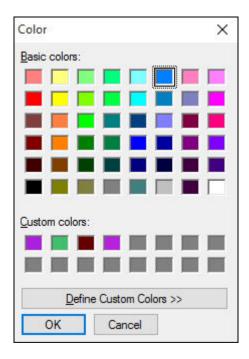
If you change the background then return the previous screen please make sure you click the **Save** button on the **System Setup** screen so that the background will update once you logout and back into the system.

#### **Set Title bar and Button Colors**

Click on Background Image, then click the Set Title Bar and Button Colors button to change the title bar and buttons colors in AccuSQL/AccuTrack 2019 or later.

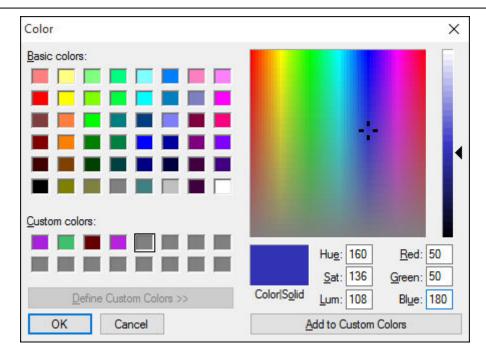


First, click **Choose Color** to select the color you want to use. You can either select a **Basic Color** already shown...



Or click the **Define Custom Colors** button to either drag the crosshair pointer to a color, or use HSL, or RGB color values:

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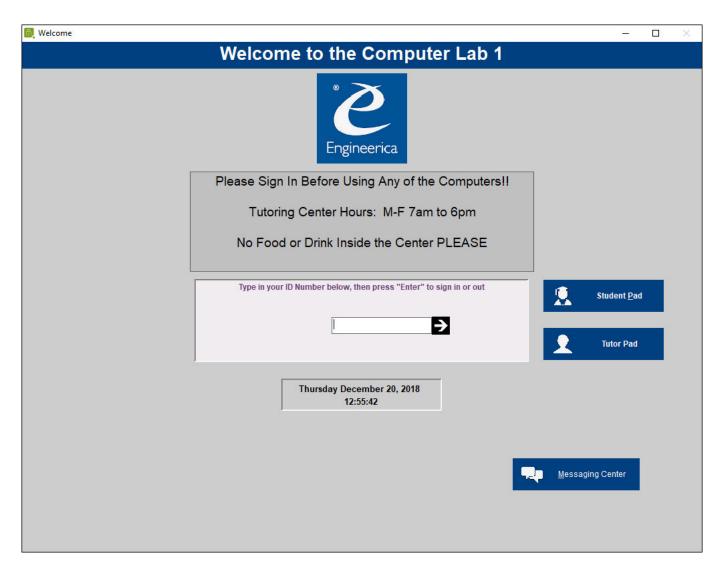


Based on the color you select, you will see a preview of the title bar and buttons on the screen. You then have the option to Keep this color setting or revert it:



Click **Keep this color setting** and the screen will close automatically. Now click **Close** again in the Background Image screen and then **Save** and the bottom of **System Setup**. Finally, click **Return to** 

**Sign-in Screen** to see your changes.



# **Terminology**

Click the **Terminology** button if you want to change the terms used in **AccuSQL/AccuTrack**. This window will appear:

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When you first open the **Terminology** screen, it will automatically display the last items in the grid. Click the up arrow on the right to see more items you can change.

You can change the following terms/labels in the system:

- Activity
- Student
- Tutor
- Service Type
- Tutoring
- Seminar
- Semester

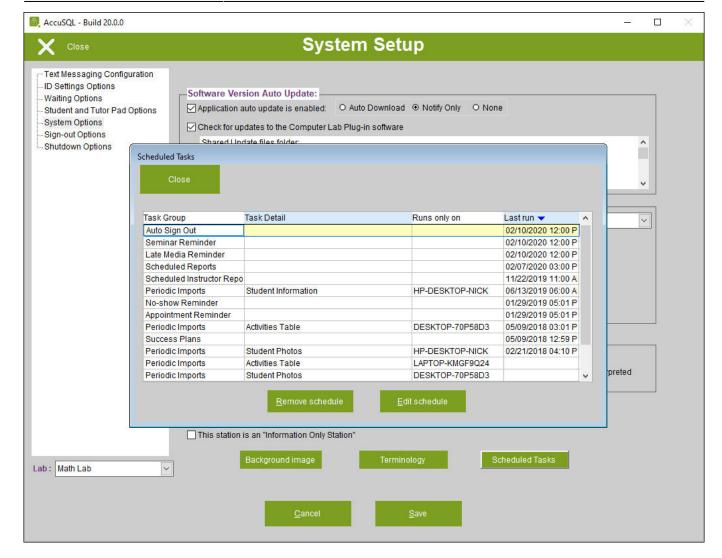
For example, if you were using the software in an **Advising Center**, you might want to change "Student" to "Client", change "Tutor" to "Advisor", change "Activity" to "Service", and "Tutoring" to "Advising". You can also change the "Seminar" term/label to "Workshop" and "Semester" to "Quarter".

If you change a term, your defined term will appear in place of anywhere it is labeled throughout the **AccuSQL/AccuTrack** screens, application messages, and on the reports.

**Note:** If you change the Lab drop-down box in the lower-left of the main **System Setup** screen to a different **Local Lab/Center**, you can create different terminology for each of the different **Labs/Centers**. Be sure to click **Save** at the bottom of the **System Setup Options** screen after changing each **Lab/Center's Terminology**.

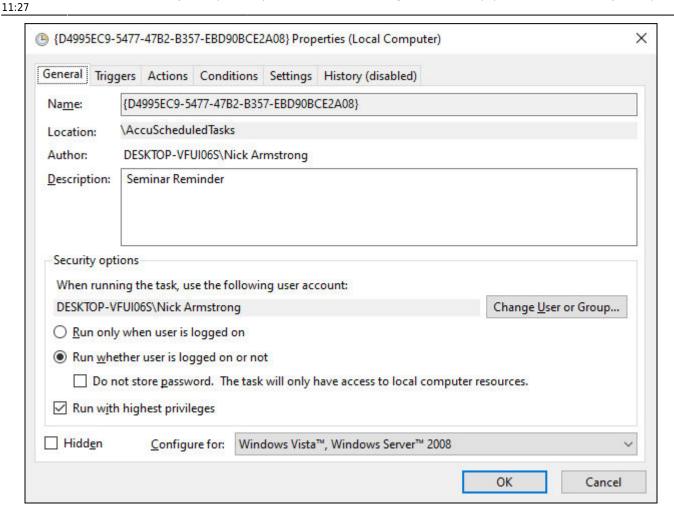
#### **Scheduled Tasks**

This section in **AccuTrack/AccuSQL** it shows you the setup of the scheduled task that is either using AccuTaskHandler.exe (for 2018 and newer) or AccuTaskRunner.exe (for 2017 and older).

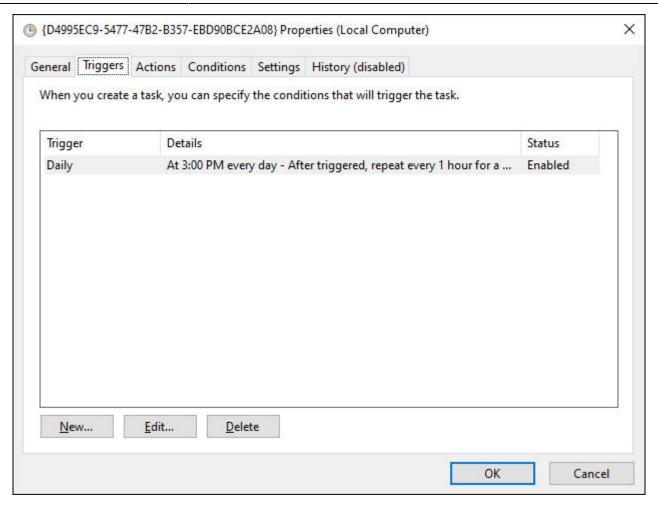


In this section, you can remove or edit the schedule of when **AccuTrack/AccuSQL** will run automated imports, scheduled reports, automatic sign-outs, etc. The screen shows you the running schedule when you click on each item in the left-side list. It may either show you a Windows Task Schedule or the classic scheduler depending on the version/year that you are running. Typically now when you create **Scheduled Tasks** using the **AccuTaskHandler.exe** they bring up and use **Windows Task Scheduler** which has proven to be more reliable than the built-in scheduling tool.

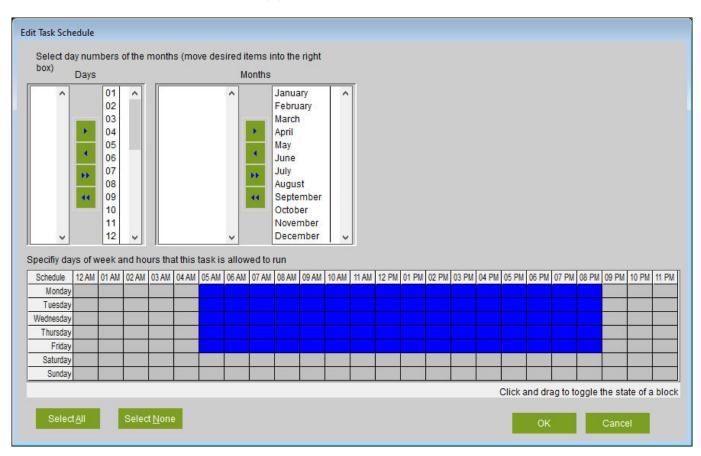
In AccuTrack/AccuSQL 2018 and newer, if you click the **Edit Schedule** button this screen will appear allowing you to update the times you would like the system to run the selected scheduled task. By default, it will open to the **General** tab where you can change **Security** settings.



You can then click on the **Triggers** tab to adjust the schedules as needed.



In AccuTrack/AccuSQL 2017 and older, if you click the **Edit Schedule** button this screen will appear allowing you to update the times you would like the system to run the selected scheduled task. You can click and drag across times or simply click on a block to schedule that time slot.



You can also access this via Windows Start Menu and typing in the search "Task Scheduler". Once there select the "AccuScheduledTasks" folder in the left-side **Task Scheduler Library** to see all the scheduled tasks setup for AccuTrack/AccuSQL.

If you get an error going into this section in the current version that uses the **Windows Task Scheduler** option, then please follow the steps outlined in our **AccuTrack Knowledge Base** about how to set up this new additional process:

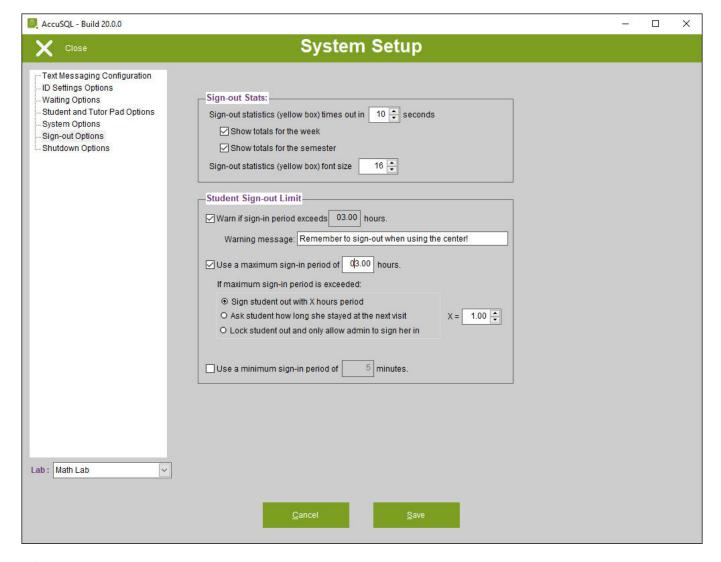
AccuTaskHandler Setup for AccuSQL 2018 or later OR

AccuTaskHandler Setup Guide (PDF)

#### SIGN-OUT OPTIONS

**Purpose:** This section allows you to set the **Sign-out Statistics** that shows when a student signs out and the automatic sign-out feature settings.

**How To Access:** click **System** in **System Administration**, then the **Setup** button at the bottom right. On the left-side menu of the next screen, click **Sign-out Options**.



### Sign-out Stats

**Sign-out statistics times out in X seconds:** Use the spinner box to indicate how many seconds the yellow statistics box will be displayed. Note that if a key is hit or the mouse is clicked, the box will immediately disappear even if this time did not pass yet.

**Show totals for the week:** Check this option if you want the student to see their total hours for the week at sign out.

**Show totals for the semester:** Check this option if you want the students to see their total hours for the semester at sign out.

**Sign-out statistics font-size:** Use the spinner box to determine the size of the font that will be used to display the sign out statistics.

### **Student Sign-out Limit**

**Warn if sign-in period exceeds:** Check this box if you want to display a warning message when the student's sign-in period exceeds a certain period. If selected, enter the max period in hours and fractions of hours in the text box.

**Warning message:** If you checked the box above, then enter the warning message that will be displayed when the maximum sign-in period is exceeded.

**Use a maximum sign-in period:** Check this box if you want to enter a maximum sign-in period for students. If selected, enter the max period in hours and fractions of hours in the text box. You can specify the action when this maximum is exceeded via one of the three radio buttons:

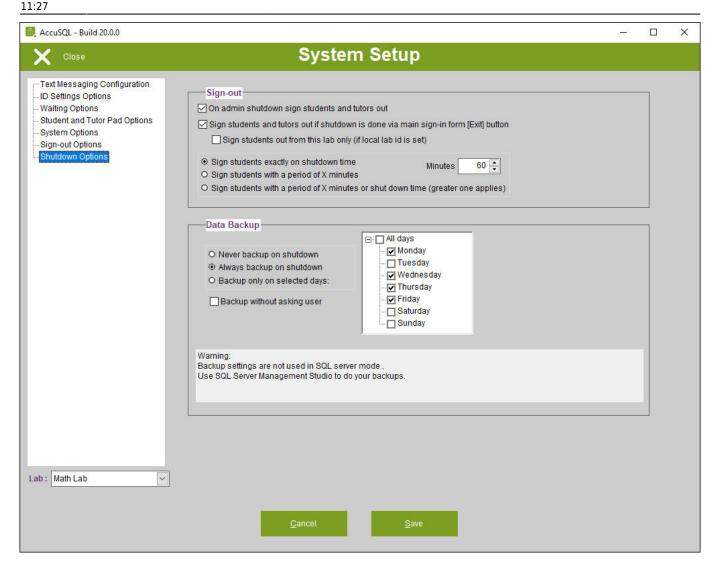
- **Sign student with X hour period:** Choose this option if you want students who exceed the maximum sign-in period to get signed out with X sign-in period. Set X to whatever you like using the X= spinner box.
- Ask the student how long he stayed at the next visit: Choose this option to have AccuSQL/AccuTrack ask the student at the next visit to enter the sign-in period for the previous visit in which the maximum sign-in period was exceeded.
- Lock student out and only allow admin to sign her in: Choose this option for maximum control over the accuracy of the sign-in records. With this option selected, when a student exceeds the maximum sign-in period **AccuSQL/AccuTrack** will lock him or her out. To unlock the record, the student must be signed out via the Student Visits Tracking » Sign out screen.

**Use a minimum sign-in period:** Check this box if you want to enter a minimum sign-in period for students. If they try to sign out before the minimum is reached, they will receive a warning message.

# **SHUTDOWN OPTIONS**

**Purpose:** Use this page to indicate actions to take when you exit **AccuSQL/AccuTrack**. These options include auto sign-out at exit and database backup.

**How To Access:** Click **System** in **System Administration**, then the **Setup** button in the bottom right. On the next screen in the left-side menu, click **Shutdown Options**.



## Sign Out

On admin shutdown sign students and tutors out: If this feature is selected, when you exit AccuSQL/AccuTrack the software will ask whether you want to sign out any students or tutors who are still signed in.

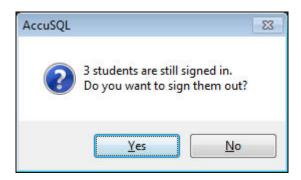
**Sign students and tutors out if a shutdown is done via main sign-in form Exit button:** Use this checkbox if you want **AccuSQL/AccuTrack** to check for sign-outs when the Exit button is pressed from the main sign-in screen.

**Sign students out from this lab only (of local lab is set):** If you enable sign-outs on shutdown, you can also indicate whether **AccuSQL/AccuTrack** should sign out all students and tutors in all the labs (if shared lab installation) or only sign out students and tutors who signed in this lab.

If you enable either one of the above options, you can also specify **how the sign-out time is calculated with auto sign-out:** 

- Use the first option if you want the time of the shutdown to be used as the sign-out time.
- Use the second option if you want to give each person that signed-in a certain sign-in period. The sign-in period is entered in minutes using the spinner box on the right.
- Use the third box if you want the greater of the sign-in period or shutdown time to be used for the sign-out.

If auto sign-out is turned on, **AccuSQL/AccuTrack** will check if any students or tutors are still signed in when you click on the "Exit" button. If so, you will see a message box:



Click on yes to automatically sign out the students and tutors who are still signed in using the rules you selected in the Options page.

#### **Data Backup**

In **AccuSQL** all backups are handled in MS SQL Server. It is important that you verify with your MS SQL Server Administrator that database backups are scheduled regularly for your database. For **AccuTrack**, you can set the backup schedule here.

If you are using **AccuTrack** then set the backup options (radio buttons) in the section labeled Data Backup. Here's a brief explanation of each option:

- Never backup on shutdown This will not backup the database at all.
- Always backup on shutdown This will back up the database daily when the last user connected to that database closes AccuTrack.
- **Backup only on the Selected days** This will back up the database daily when the last user connected to that database closes **AccuTrack** but only on the selected days. If this is selected now set the scheduled days of the week (checkboxes).

Once you've made your selections be sure to click the **Save** button at the bottom to save these changes.

**Note:** If you have multiple Local Labs/Centers then you want to make these changes with the lab set to "Default - All" in the drop-down menu labeled "Lab:" in the bottom-left corner of the screen.

**Important:** Back up your data often. It is always better to be safe than sorry!

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