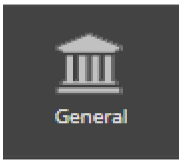
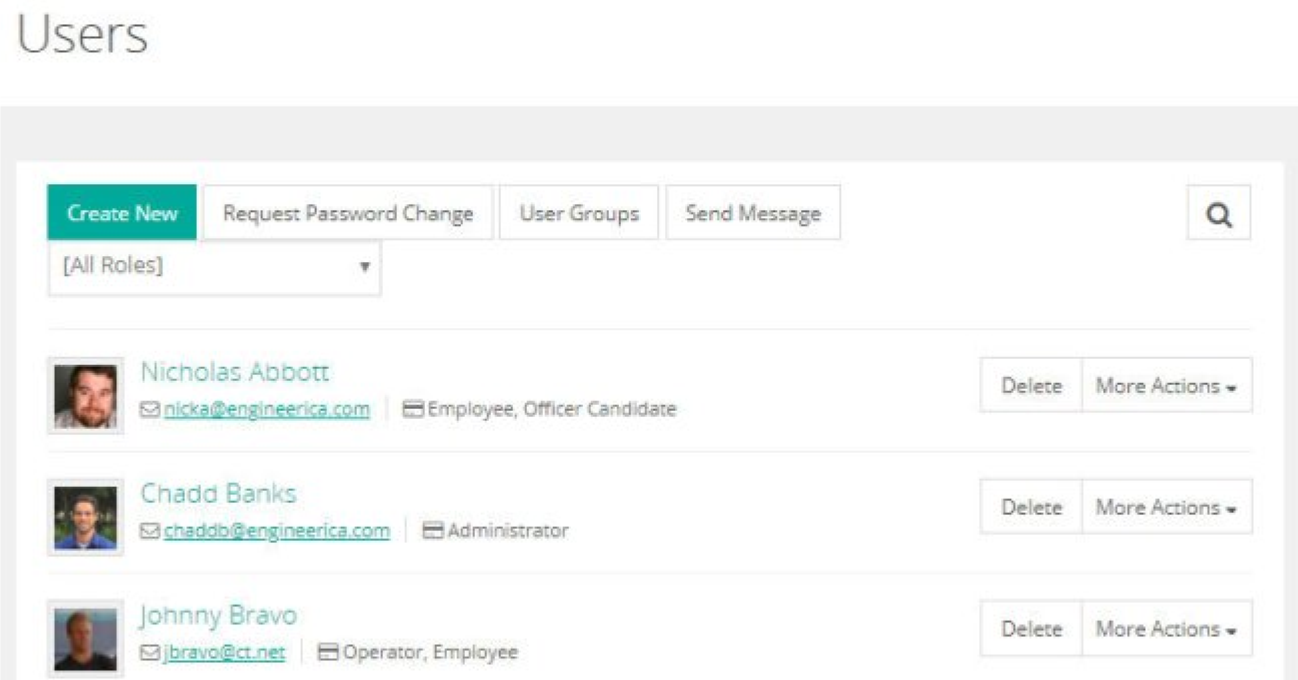
General



The **General** section is where you start creating the basic building blocks of the system that your **Employees** or **Users** will interact with in the **AccuTraining** software. **Training Courses** get added to training plans that **Employees** complete.

Employees

This section is where all the **Users** or **Employees** are created that interact with the **AccuTraining** software. **Users** can be one of three distinct **User Roles** (**Operator**, **Employee**, or **Administrator**). **Users** can also belong to one or several **User Groups** or **Employee Groups**. These **User Groups** or **Employee Groups** can be then assigned **Training Plans** that all **Users** or **Employees** must complete.



Create Users

To create a user click the **Create New** button in the top left-side of your screen and follow these instructions:

Complete the following info:

User Info

- **First Name (Required)** - The user's first name goes here.
- **Last Name (Required)** - The user's last name goes here.
- **Email (Required)** - The user's email address goes here.
- **Card Number** - The user's card number goes here.
- **Password (Required for Admin/Operator Role)** - The user's password.
- **Repeat** - If entering a password repeat it in this field.

Security

- **Role** - Select a from the following options:
  1. **Administrator** - This is a person that will have full access to **AccuTraining** to manage and maintain the software.
  2. **Operator** - This is a person that will have limited access to **AccuTraining** to manage and maintain the software and will be primarily used to scan people into the **Training Courses** using the Apple devices.
  3. **Employee** - This is a person that will have no access to **AccuTraining** to manage and maintain the software but will be required to interact with the software by following their assigned **Training Plans** and attending their required **Training Courses**.

Photo

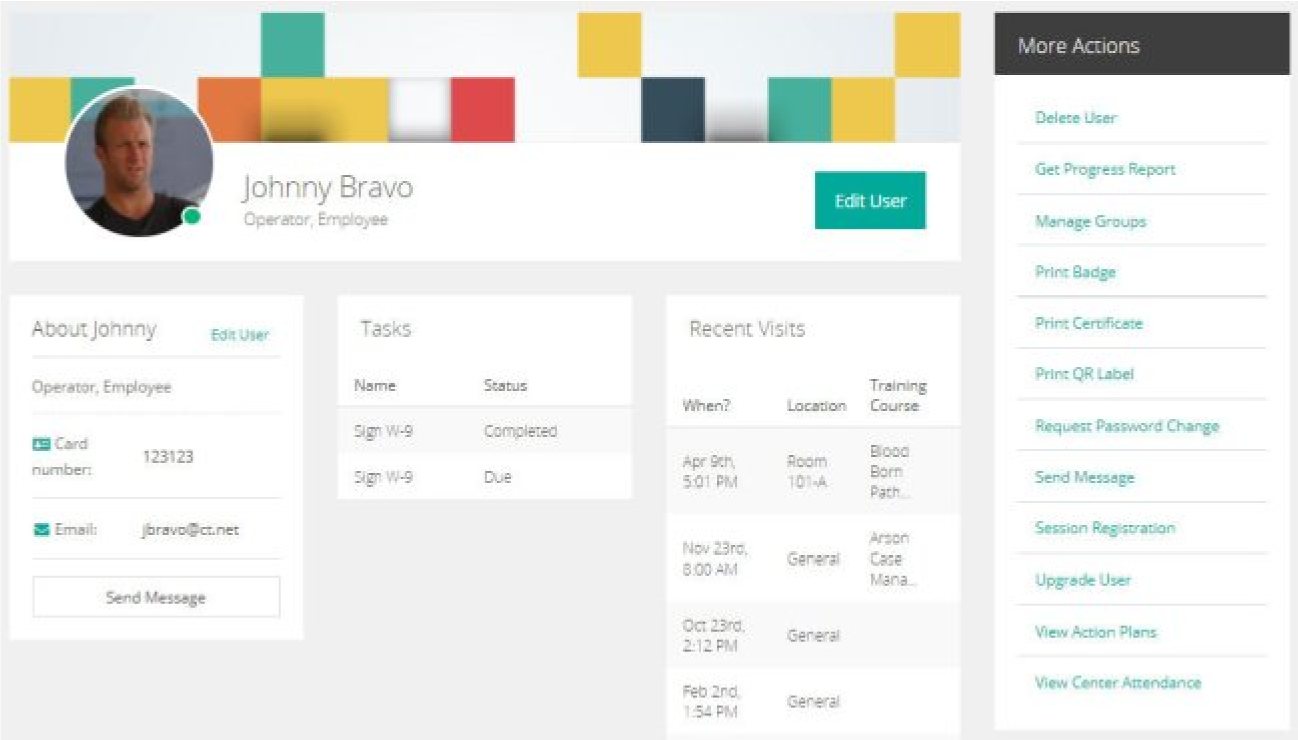
- Optionally you can upload a photo of the user on the far right-side of the screen.

Be sure to save the user by clicking the **Save** button at the bottom of the screen.

Edit Users

To edit a **User** you simply have to click on the name of the **User** when in the **Employees and Users** menu.

You can also use the search bar located at the top of any screen in AccuTraining to edit the **User**. When they appear in the search results simply click on them to edit the **User**.



More Actions

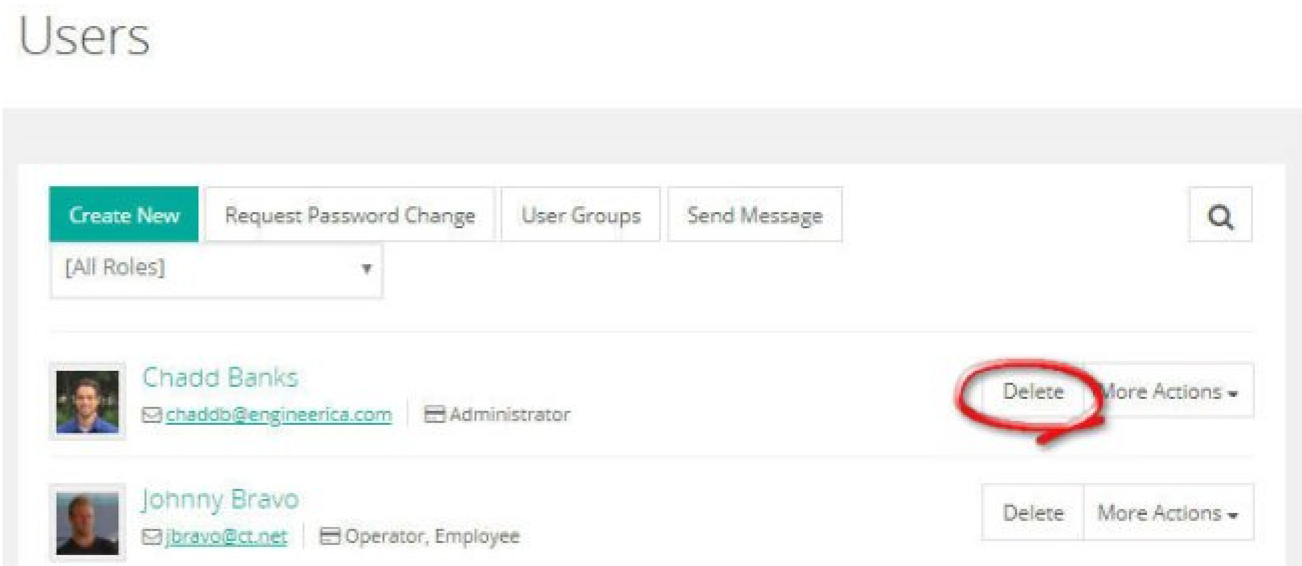
Notice that when you edit the **User** there are a lot of additional options in the "More Actions" teal box on the right side of the page. Here's an explanation of the Additional options:

- **Delete User** - Allows you to delete the user. ***Warning! All attendance records will be lost.***
- **Get Progress Report** - Allows you to get a personalized Progress Report for this User.
- **Manage Groups** - Manage the **Employee Groups** this user belongs to.
- **Print Badge** - Print this User's Badge.
- **Print Certificate** - Print this User's Certificate.
- **Print QR Label** - Print this User's QR Label.
- **Request Password Change** - Use this option to request the **User** update their password and you may use this to have them setup a password for the first time as well.
- **Send Message** - Use this option to send a message in AccuTraining and Email to the **User**.
- **Session Registration** - Manage the Registration for this User in each Training Course.
- **Upgrade User** - This option allows you to quickly add a new **Security Role** like an **Administrator** or **Operator** role.
- **View Task Plans** - This option allows you to quickly view the Employees **Task Plans** assigned.
- **View Attendance** - View this User's Attendance.

As well to see the same list of **More Actions** click the link located on the far right-side of all the **Users** in the list of **Users** on the **Employees and Users** menu.

Delete User

Simply click the **Delete** link and confirm the deletion on the popup window to delete the **User** when in the **Employee** list screen.



Additionally when editing a **User**, as shown in the previous section, you have the option to delete the **User** in a teal box located on the right-side of the screen. Simply click **Delete Course** link and confirm the deletion on the popup window to delete the **User**.

Importing Users

Location: Advanced Options > Import

This is the import process for all user types (**Administrators**, **Operators**, and **Employees**).

Valid headers:

- **FirstName**
- **MiddleInitial (optional)**
- **LastName**
- **Email**
- **CardNumber**
- **Active (optional)**

Explanation:

The **Email** is used to uniquely identify the user, it must be unique across all the users in the system. It also allows users to login, 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 **FirstName** and **LastName** are required. It's usually displayed in the format First Last. You can also optionally specify the **MiddleInitial**

The **CardNumber** is required to track attendance by reading physical cards using a card reader, scanning the barcodes using the mobile app for iPod touch/iPhone/iPad, or using an RFID reader connected to a PC Sign-in Station.

The **Active** field is optional. Specifies whether the user is active or not. 'Yes' or 'No' values are accepted. Defaults to 'Yes'.

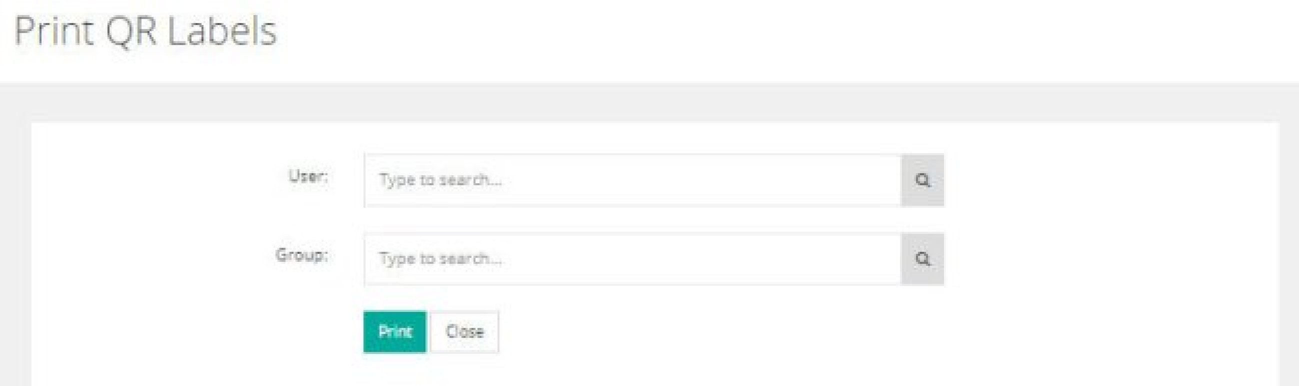
Example:

FirstName	MiddleInitial	LastName	Email	CardNumber	Active
Winnie	T	Pooh	wpooh@accuclass.com	1089	Yes
Roger		Rabbit	roger.rabbit@accuclass.com	1035	No
Donald		Duck	duck@accuclass.com	6584	Yes
Fred		Flintstone	fred@accuclass.com	1078	Yes
Homer	J	Simpson	homerjs@accuclass.com	1812	Yes

Download the example file (.CSV)

Print QR Labels

This is a printable sheet of 24 QR codes on 1-1/2“ x 1-1/2” squares with the names and card numbers of each user in that **Employee Group**. Recommended printing with *Avery® Easy Peel® White Square Labels 22805, 1-1/2" x 1-1/2", Pack of 600*.

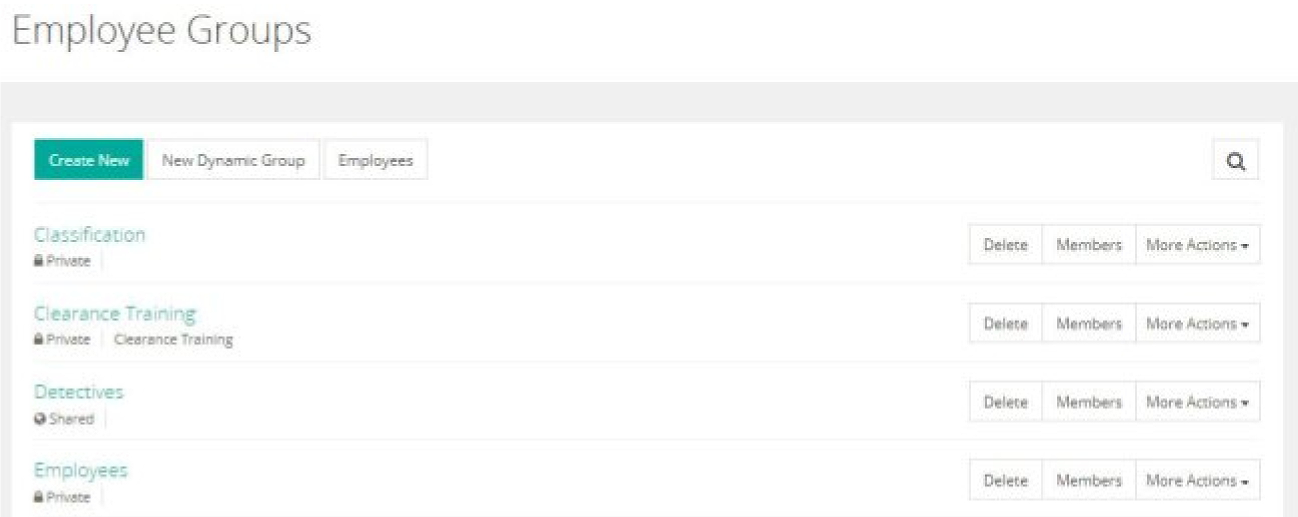


To quickly print all the **Users'** QR labels click the **Print** button. You can also filter based on individual **Users** or **Employee Groups** to get only the labels you want.

This can also be done in the teal box in the top right corner of the screen when editing the **Employee Group** to print the entire group or if editing the individual **User** you can print just that **User's** QR label.

Employee/User Groups

Employee Groups are used to assign more than one **User** or **Employee** at a time to a **Training Plan**.



Create an Employee Group

To get started click the **User Groups** button from the Training Plans Screen and then click the **Create New** button. Now complete the following information to create the **Employee Group**:

1. **Name** - This is simply the name you will use to identify the **Employee Group** in **AccuTraining** website.
2. **Description** - This is the additional information that you can optionally provide if you want help remembering who they are or to inform others who they are.

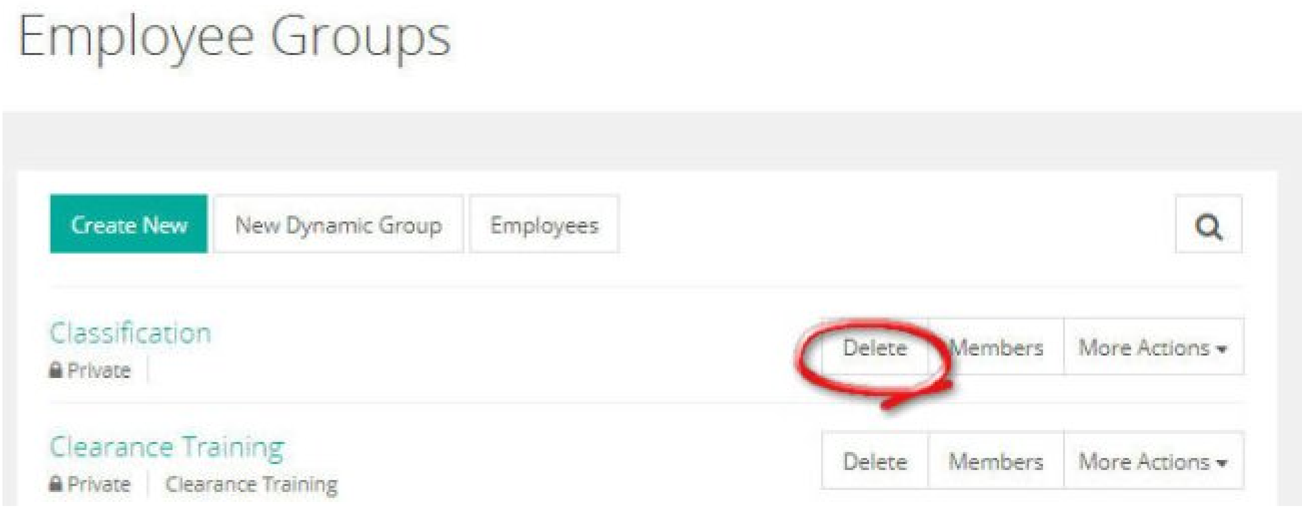
Edit an Employee Group

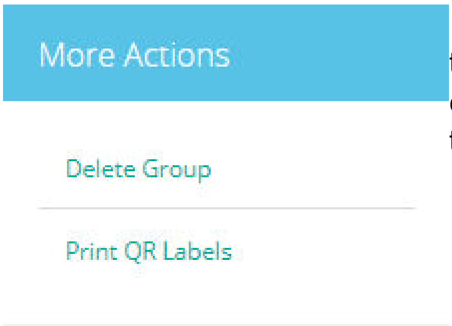
To edit a **Employee Group** you simply have to click on the name of the **Employee Group** when in the **Employee Group** menu.

You can also use the search bar located at the top of any screen in **AccuTraining** to edit the **Employee Group**. When it appears in the search results simply click it to edit the **Employee Group**.

Delete an Employee Group

Simply click the **Delete** link and confirm the deletion on the popup window to delete the **Employee Group** when in the **Employee Groups** screen.

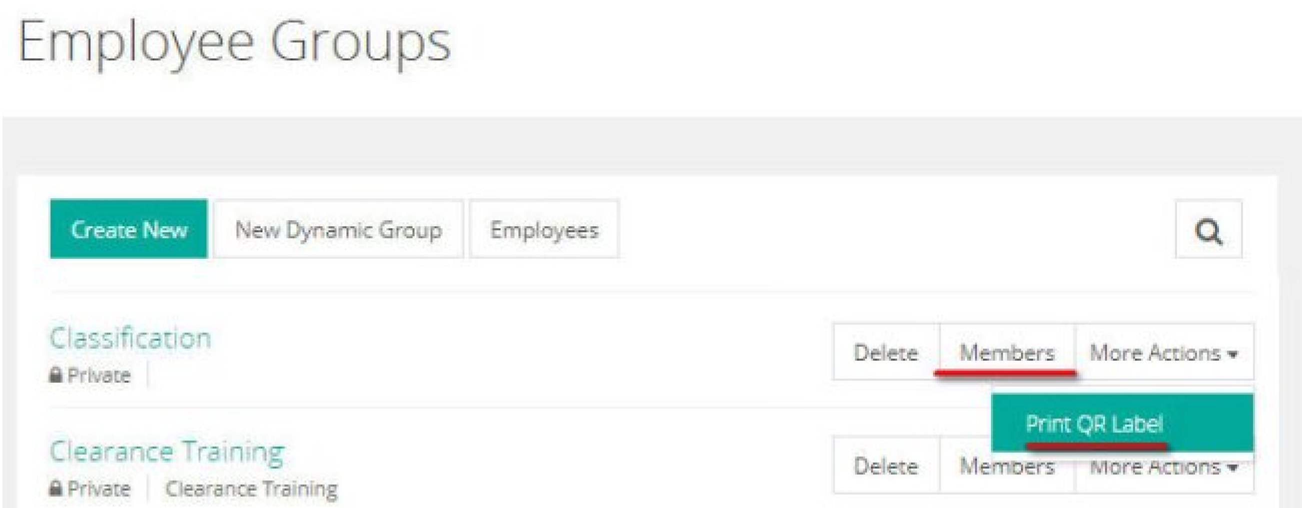




Additionally when editing a **Employee Group** you have the option to delete the **Employee Group** in a teal box located in the top right corner of the screen. Simply click **Delete Course** link and confirm the deletion on the popup window to delete the **Employee Group**.

Additional Options

When you are in the **Employee Groups** section with the list of the **Employee Groups** you'll notice a few more options that you have then on other areas. Here you can see a list of the Employees assigned to the **Employee Group** by clicking the **Members** link.



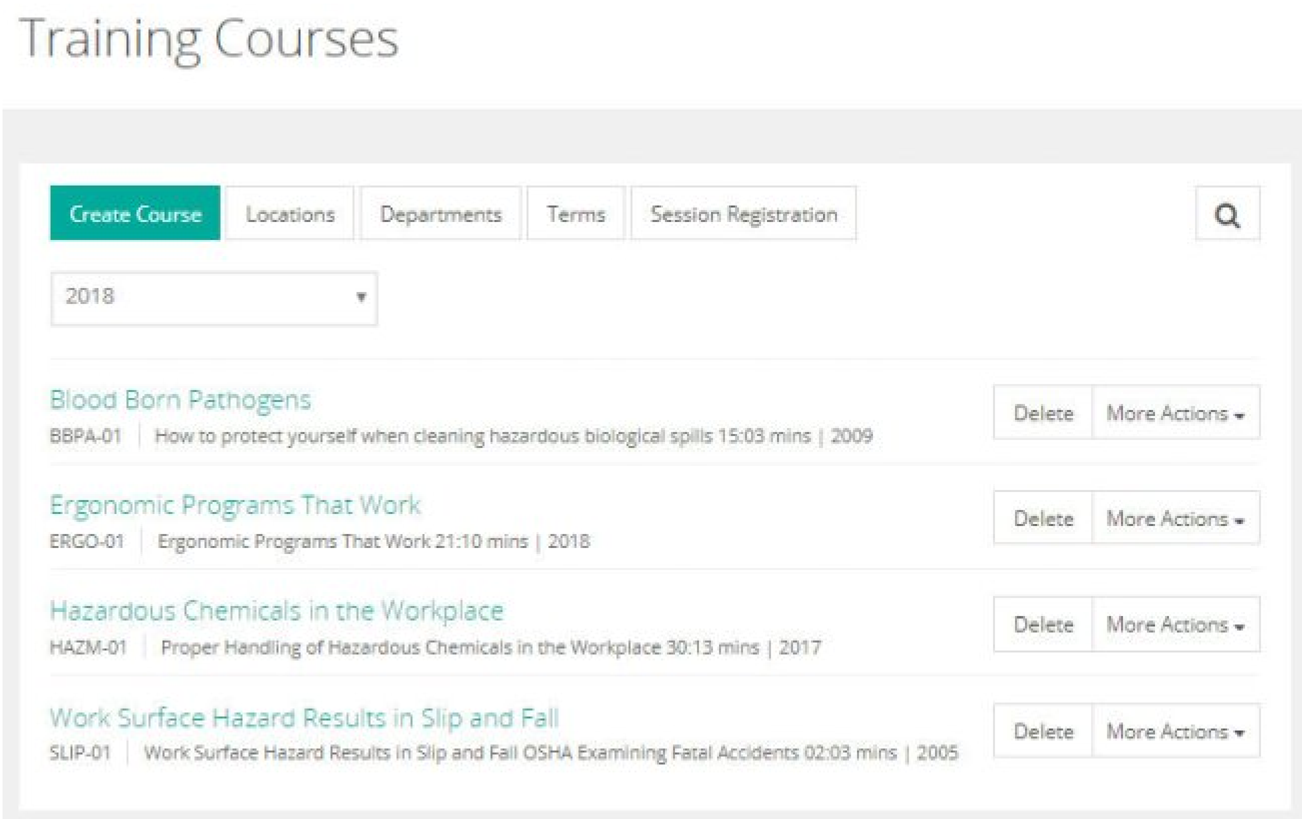
Although for a complete list of items you can do with the **Employee group** you can also click the **More Actions** link on the far right of the **Employee Group** bar. When you click the More Actions link you'll get the following options:

- **Print QR labels** - This is a printable sheet of 16 QR codes on 1-1/2“ x 1-1/2” squares with the names and card numbers of each user in that **Employee Group**. Recommended printing with

Avery® Easy Peel® White Square Labels 22805, 1-1/2" x 1-1/2", Pack of 600.

This can also be done in the teal box in the top right corner of the screen when editing the **Employee Group**.

Training Courses

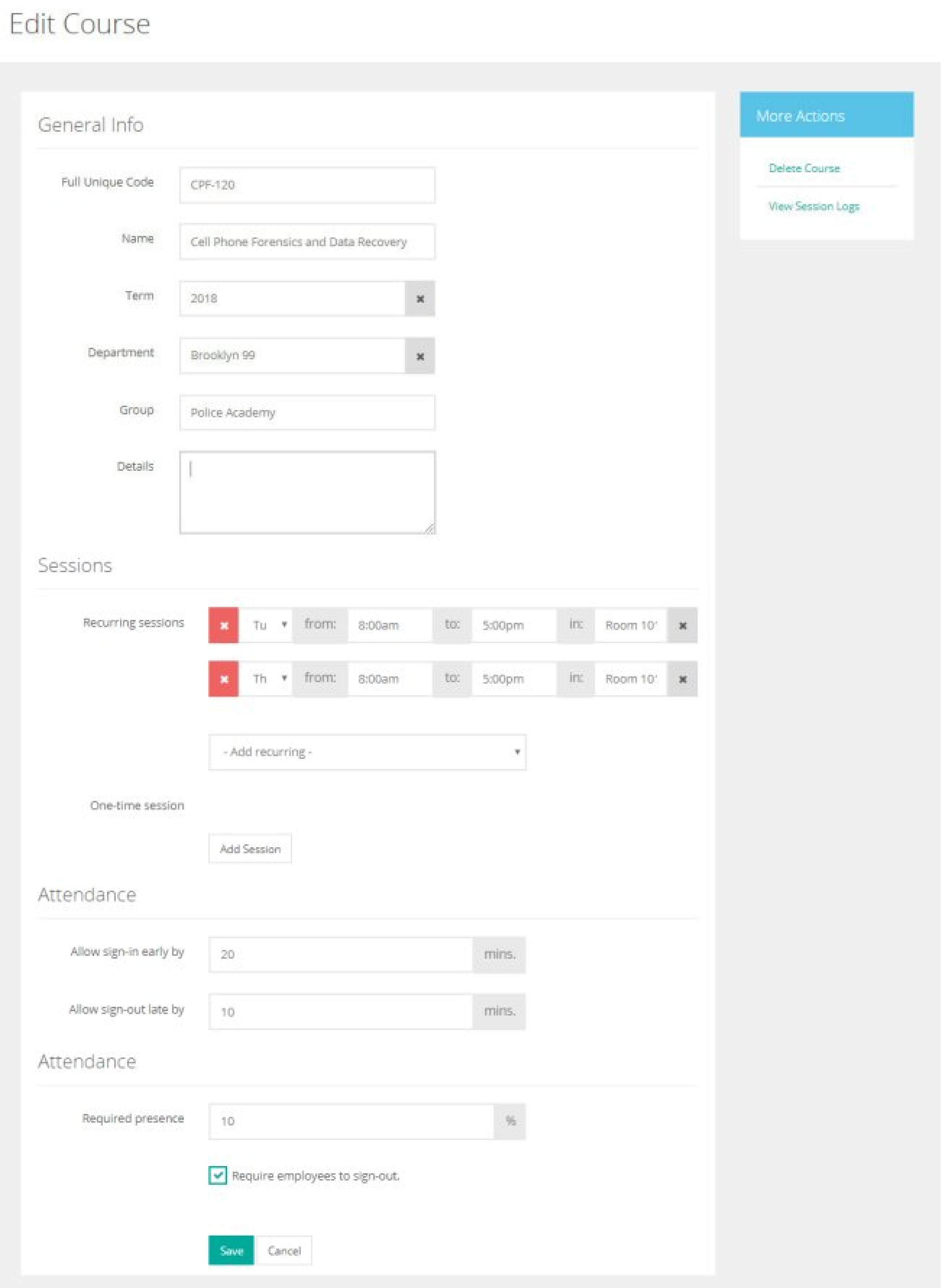


Training Courses are the different courses that the **Employees** will train on. These **Training Courses** can later be assigned as part of a **Training Plan**. **Employees** can be registered to these **Training Courses** as well. The training courses can have as complex or simple of a schedule as you could possibly want by allowing recurring and one-time scheduled dates.

Create Training Courses

Location: General > Training Courses

To create a new **Training Course** you simply click the **Create Course** button at the top of the page.



Complete the following information to create the **Training Course**:

General Info

- **Full Unique Code (Required)** - This is a unique code of the **Training Course** used to identify this specific class.
- **Name (Required)** - This is the title of the **Training Course** that you will see throughout the **AccuTraining** website when selecting the **Training Course**.
- **Term** - Used as a reporting period to be selected when running reports and if using recurring sessions it determines when the start and end dates are of these recurring sessions.

If you do not have any terms setup then you need to create one and select it here by starting to type the name of the **Term**. To learn how to create **Terms** click here.

- **Department** - Used to group **Training Courses**. This assigns a **Department** (which has to be created previously) to which the **Training Course** belongs to in **AccuTraining**. It can be used to group them in the reports or plans.
- **Group** - Used to group **Training Courses** for a **Training Plan** or Reports. If you create a group name that you tag each course with it will use it to group them in the reports or plans.
- **Details** - this is the description of the **Training Course** which can be used for any notes about the **Training Course**.

Sessions

- **Recurring Sessions** - Use this option if you need to specify the days of the week and time that the **Training Course** will occur. **Example:** *"Mondays at 10:00 AM - 10:50 AM in RM101"*
- Follow these steps to add a Recurring Session:
  1. Select a day of the week from the drop-down box.
  2. Click the first "at" field to set the start time for that day of the week.
     - Type the time manually or select the time in the drop-down box.
  3. Now click the second "at" field to set the end time for that day of the week.
  4. Finally click the "in" field to set the location the training will take place. Simply type the first 3 characters of the location name to get it to appear and click it to select that location.

If you do not have any locations setup then you can use the "Default Location" by starting to type it in the field and selecting it. To learn how to create your own **Locations** click here.

- **One-time Session** - Use this option if your **Training Course** only occurs on specific dates or if you need to add days outside of the normal schedule that you will be meeting. It is completely fine to use both Recurring Sessions and One-time Sessions when setting the **Training Course** Schedule.

Attendance Options

- **Allow** Employees **to sign-in early by (X) minutes.** - Simply place the number of minutes an **Employee** can be early to receive credit for the **Training Course**.

- **Allow** Employees **to sign-out late by (X) minutes.** - Simply place the number of minutes an **Employee** can leave after the session has completed to receive credit for the **Training Course**.

- **Required Presence (Required)** - Simply place the percentage of the **Training Course** that the **Employee** must attend in order to receive credit for the **Training Course**.

All these **Training Course** Options can be set in the **Advanced Options** > **Settings** > **Attendance** section from the Home screen of the **AccuTraining** website to set these settings for all of the **Training Courses**.

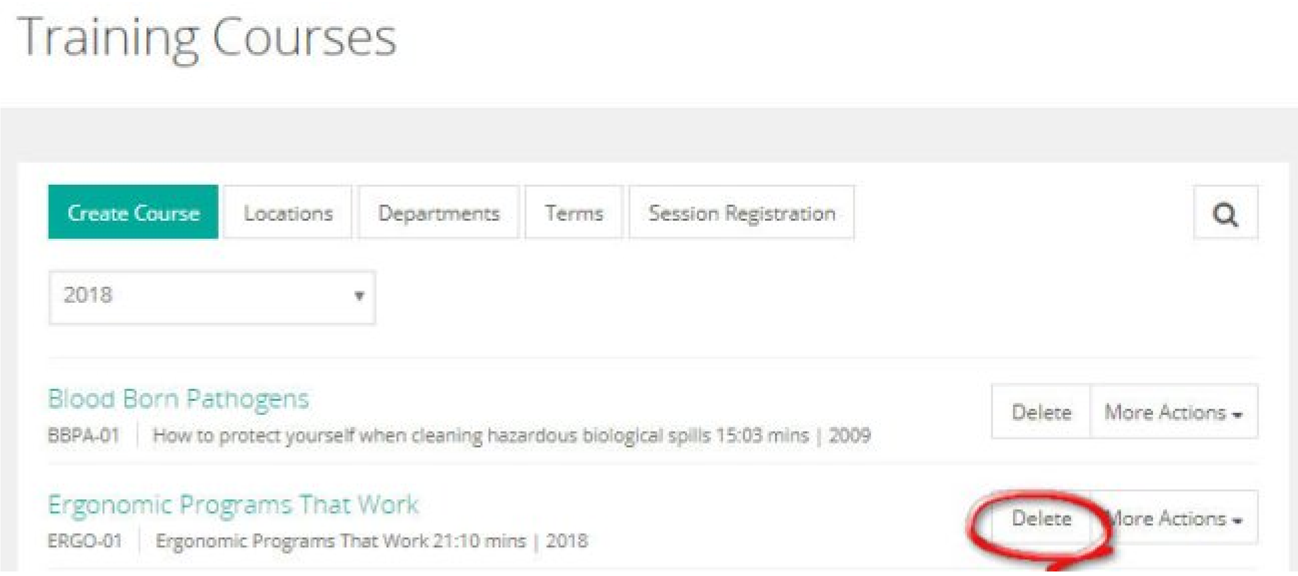
Edit Training Courses

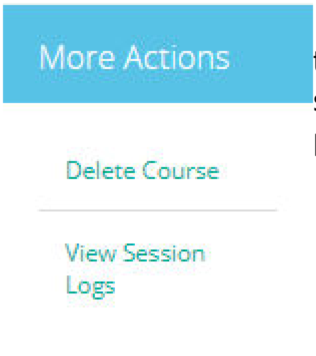
To edit a **Training Course** you simply have to click on the name of the **Training Course** when in the **Training Courses** menu.

You can also use the search bar located at the top of any screen in **AccuTraining** to edit the **Training Course**. When it appears in the search results simply click it to edit the **Training Course**.

Delete Training Courses

Simply click the **Delete** link and confirm the deletion on the popup window to delete the **Training Course** when in the **Training Courses** screen.





Additionally when editing a **Training Course** you have the option to delete the **Training Course** in a teal box located in the top right corner of the screen. Simply click **Delete Course** link and confirm the deletion on the popup window to delete the **Training Course**.

It is recommended that you do not delete **Training Courses** unless you no longer need the attendance associated with that **Training Course** as it will no longer be available after you delete the **Training Course**.

Import Training Courses

Location: Advanced Options > Import

Valid headers:

- **Code**
- **Name**
- **Term**
- **Details** *(optional)*
- **Group** *(optional)*
- **Department** *(optional)*
- **Schedule** *(optional)*

Explanation:

The **Name** is used to uniquely identify the training course, it must be unique across all the courses in the system.

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

The **Group** is optional and it's useful to tie training Courses together.

The **Department** is optional.

The **Schedule** field 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 training Course is given, without spaces. For example: MWF means that the training Course 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 training Course. For example: 20131007 specifies that the training Course is on October 7th, 2013.
- <start> is the start time of the training Course, in military time. For example 900 or 0900 refers to 9am, 1730 refers to 5:30pm.
- <end> is the end time of the training Course, 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:

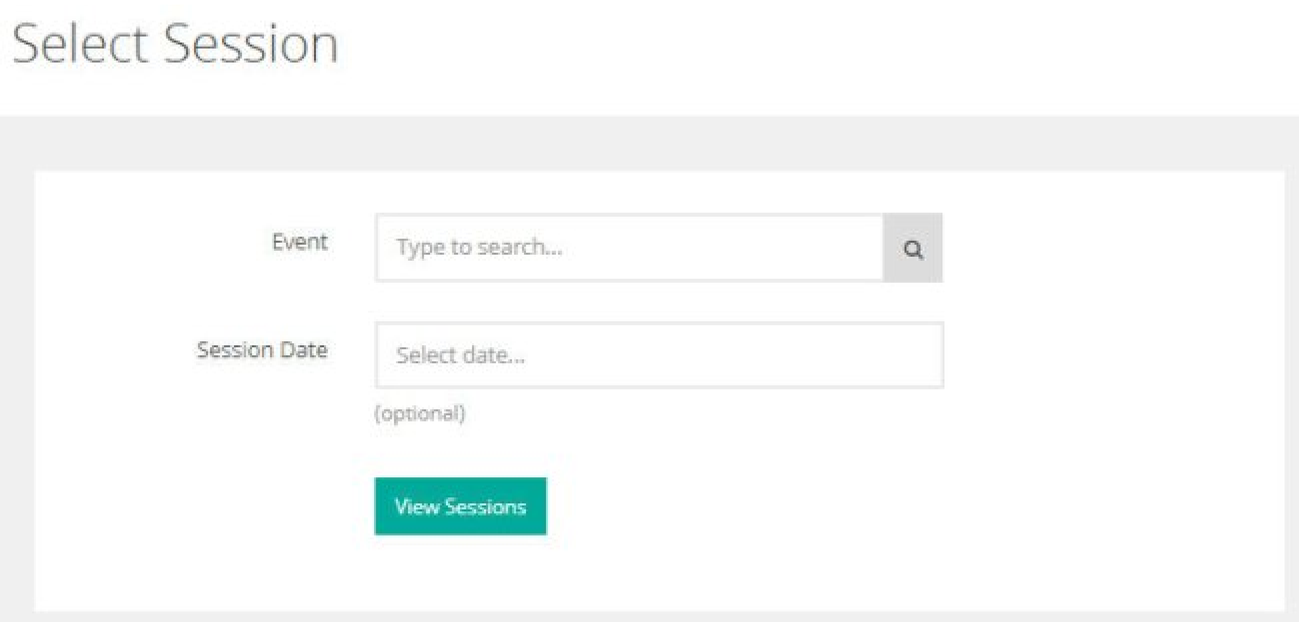
MWF 900-1030 A-101 / TR 1400-1530 A-201 / 20130815 1100-1230 A-203

Example:

Code	Name	Details	Department	Term	Schedule	Group
ACCT-110-01	Financial Accounting I	Course details	Economics	Spring 2015	MW 900-1040 A-101	ACCT-110
BIOL-111-A	Biology I	Course details	Biology	Spring 2015	TF 1500-1620 A-102	BIOL-111
TCDW-120-2	Technical Drawing I	Course details	Industrial Design	Spring 2015	WS 900-1040 A-201	TCDW-120
TCMO-101-B	3D Modeling	Course details	Industrial Design	Spring 2015	R 900-1040 A-202	TCMO-101
HISE-121-C	European History	Course details	History	Spring 2015	TR 1300-1400 A-101	HISE-121

Download the example file (.csv)

Session Registration



Use this area to manage the **Session Registration** to specific sessions of the **Training Courses**.

To manage the **Session Registration** follow these steps:

1. Simply type at least the first 3 letters of the **Training Course** in the **Select Course** field and then select the **Training Course** in the drop-down list.
2. Optionally select a **Session Date** using the Calendar that appears when you click the **Session Date** field. ***Note: If you choose not to supply a date AccuTraining will only load the next 7 days of sessions.***
3. Finally click the **View Sessions** button and AccuTraining will display the available **Training Course** sessions.
4. From the results displayed simply click the **View Registration** link on the right side of the

Training Course session you wish to modify the registration.
5. Here you can add **Employees** to the **Registered Users** section by typing their names in the search field, selecting them in the drop-down menu, and then by clicking the **Add Employe**e button.
6. Once done if you have more **Training Course** sessions to modify you can click the **Change Session** button to start again with another **Training Course** session.

Users must be added in order to manage the **Training Course** registration.

Locations

Locations are simply where the **Training Courses** will take place. This is helpful and makes more sense when signing people into the actual **Training Session**. The reason is I can set a Sign-in Station and or the **AccuTraining** app to a particular **Location** that it will follow the schedule for that **Location**.

Create Locations

While in the **Training Courses** section click the **Locations** button to create a new **Location**.

To create the new location follow these steps:

1. Click the **Create Location** button.
2. Enter a name for the **Location**.
3. Optionally add a description for the **Location**.
4. Save the **Location** by clicking the **Save** button at the bottom.

Click here to go back to the **AccuTraining Quick Start Guide**.

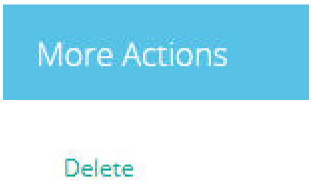
Edit Locations

To edit a **Location** you simply have to click on the name of the **Location** when in the **Locations** menu.

You can also use the search bar located at the top of any screen in **AccuTraining** to edit the **Location**. When it appears in the search results simply click it to edit the **Location**.

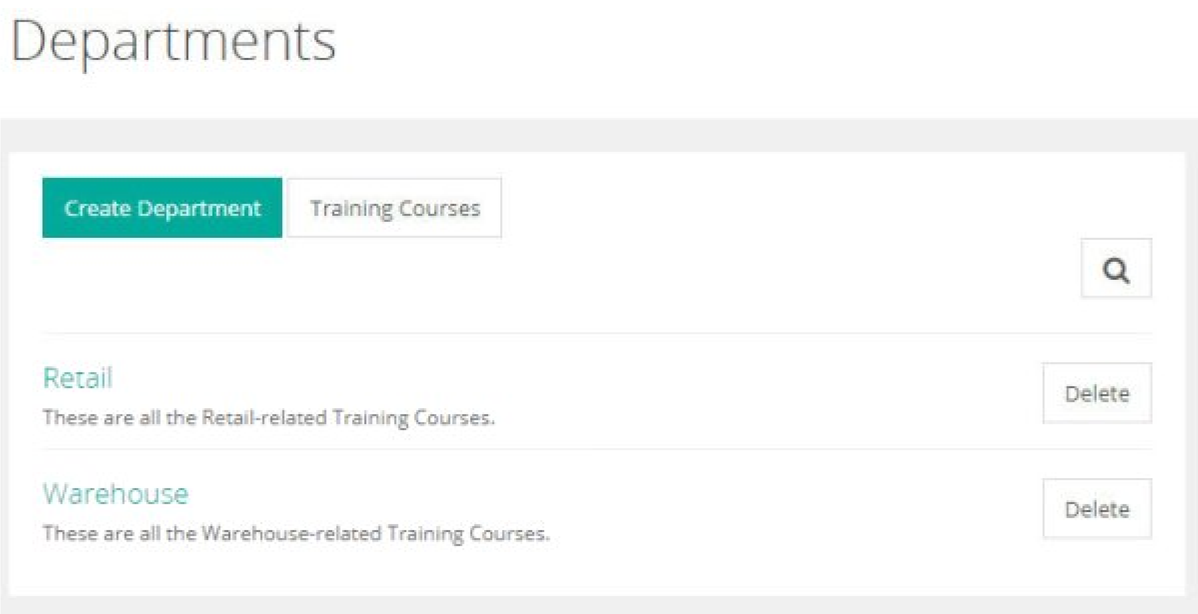
Delete Locations

Simply click **Delete** link and confirm the deletion on the popup window to delete the **Location** when in the **Location** screen. Alternatively you can also click the title of the **Location** to view it and decide if you want to really delete it. Then you would simply click the **Delete** option in the box in the top-right corner of that **Location** edit screen.



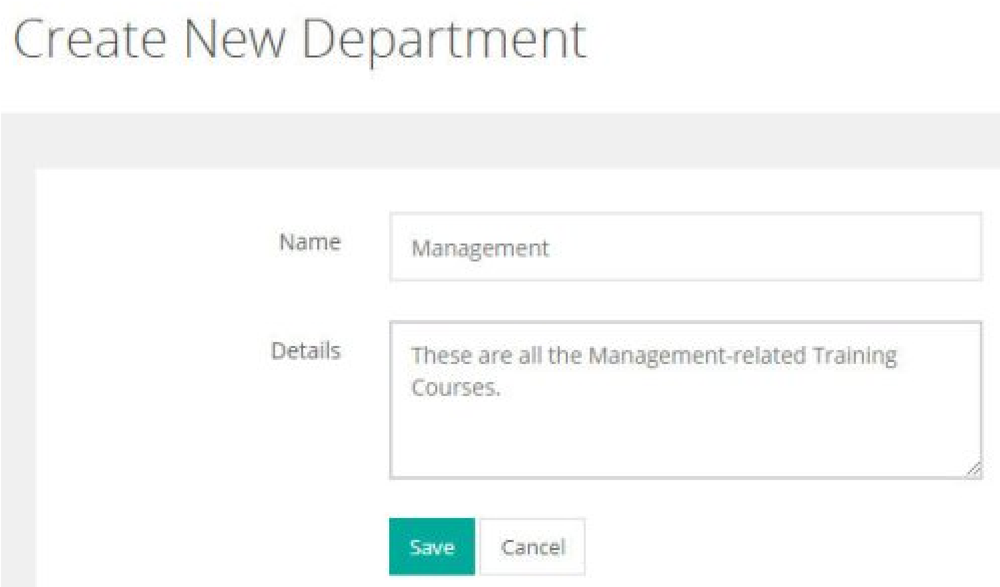
Departments

Departments can be used to group **Training Courses** for reporting. In case you have a subset or separated area/disciplines of **Training Courses** you need to identify on a report. **Training Plans** are setup to assign specified **Training Courses** that could be from multiple **Departments** to **Employees**.



Create Department

While in the **Training Courses** section click the **Departments** button to create a new **Department**.



To create the new **Department** follow these steps:

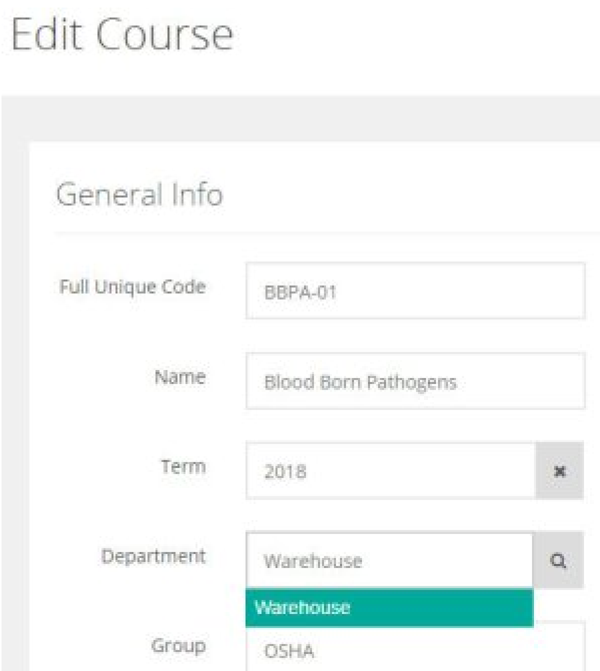
1. Click the **Create Department** button.
2. Enter a name for the **Department**.
3. Optionally add a description for the **Department**.
4. Save the **Department** by clicking the **Save** button at the bottom.

Edit Department

1. While in the **Department** section simply click the title of the **Department** you would like to edit.
2. Now update any of the following fields:
    - **Department Name** - This is what you want the Department to be called.
    - **Description** - This is here simply to give information as to why this **Department** exists.
3. Finally click the **Save** button at the bottom to keep these updates.

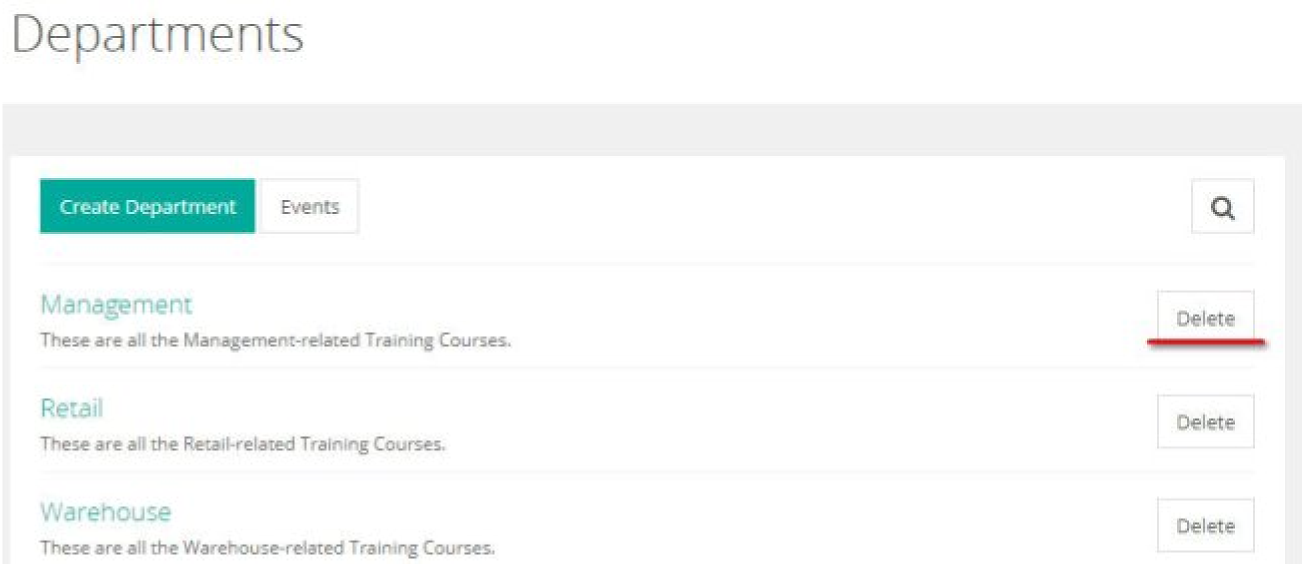
Assign Department

To assign a **Department** to a **Training Course** you'll need to do the following:

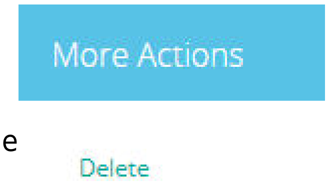


1. Go back to the list of the **Training Courses** by clicking the **Training Course/Event** button at the top if the screen or from the left-side navigation under ***General*** **>** ***Training Courses***.
2. Next click the title of the **Training Course** you want to assign a **Department** you've created.
3. From the edit **Training Course** screen you'll simply start to type the **Department** name in the **Department** textbox/field and select it once it appears in the drop-down options.
4. Be sure to click the **Save** button at the bottom of this screen in order to save the changes.

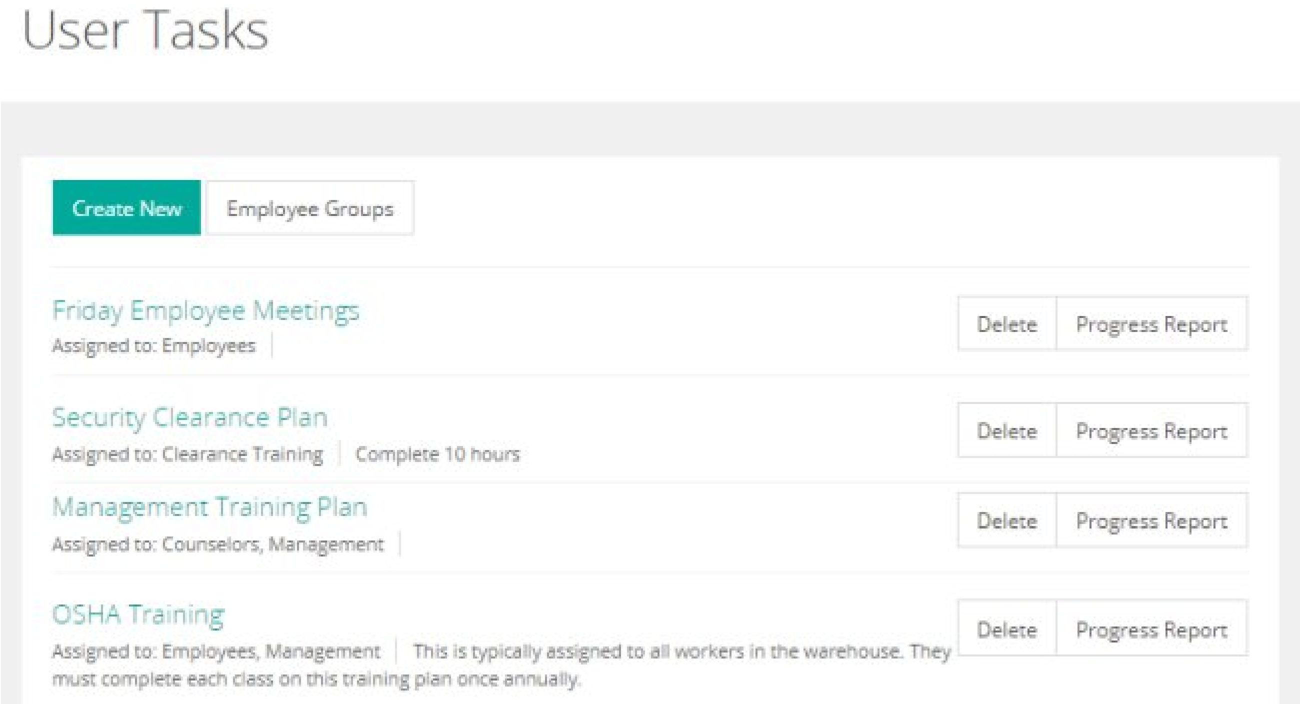
Delete Department



Simply click **Delete** link and confirm the deletion on the popup window to delete the **Department** when in the **Department** screen. Alternatively you can also click the title of the **Department** to view it and decide if you want to really delete it. Then you would simply click the **Delete** option in the box in the top-right corner of that **Department** edit screen.



Training Plans

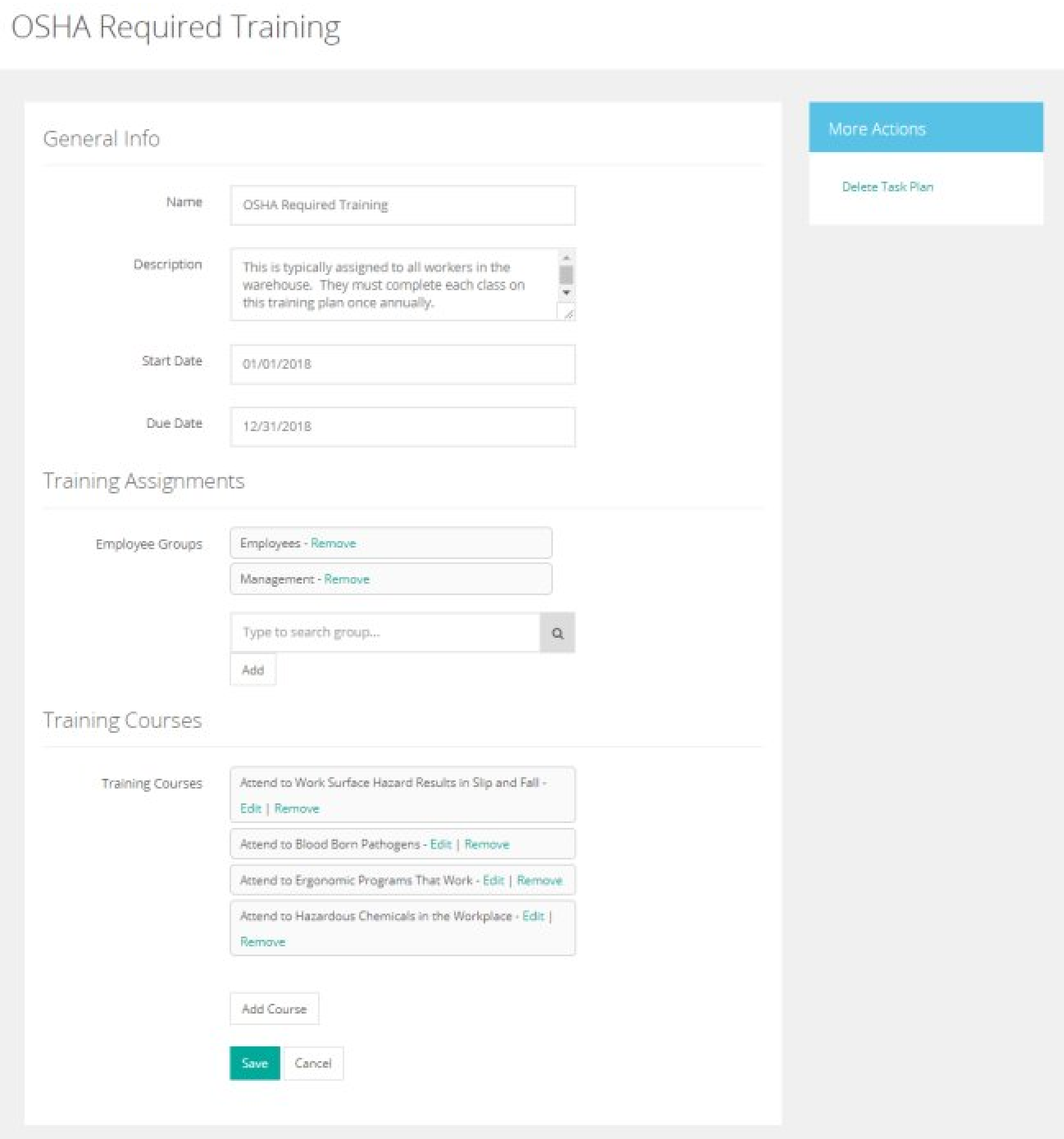


Training Plans are a collection of **Training Courses** that you can assign to an **Employee** that they need to complete.

Create Training Plans

Location: General > Training Plans

To create a new **Training Plan** click the **Create New** button on the top left of the **Training Plans** screen.



Complete the following information to create the **Training Plan**:

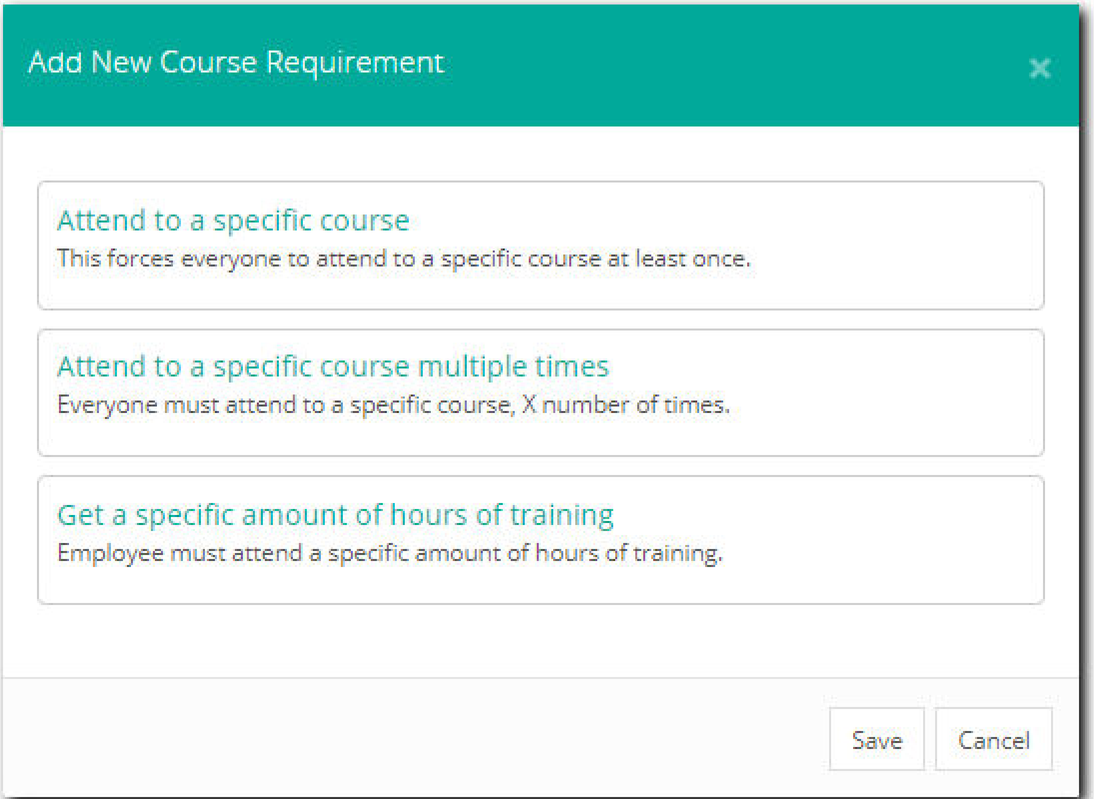
General Info

- **Name (Required)** - This is the title of the **Training Plan** that you will see throughout the **AccuTraining** website when selecting the **Training Plan**.
- **Description** - this is the description of the **Training Plan**.
- **Start Date** - this is the starting date of the **Training Plan**.
- **Due Date** - this is the due date of the **Training Plan**.

Training Assignments

- **Employee Groups** - Use this option if you need to specify the **Employee Group** that will be assigned this **Training Plan**.

Training Courses

- **Training Courses** - Use this option if you need to specify the **Training Courses** that will need to be completed in this **Training Plan**.
- To add a **Training Course** to the **Training Plan** follow these steps:
  1. Start by clicking the **Add Course** button so that you see the **Add New Course Requirement** popup window.
     - 

  2. Select 1 of the 3 options:
     1. **Attend a specific course.** - Select the **Training Course** by typing it in the field.
     2. **Attend a specific course multiple times.**
        1. Select the **Training Course** by typing it in the **Select Course** field.
        2. Set the number of required times present for that class in the **No. of Presences** field.
        3. Set the minimum number of days allowed between attending sessions in the **Min Days between Sessions** field.
        - **Example:** This means if you want them to attend “First Aid - Daily Training” at least 1 session every 2 weeks (14 days) I would set the fields to “First Aid - Daily Training”, “1”, and “14” in the fields.
     3. **Set a total amount of hours needed to complete.** - Fill-in the number of hours required.
  3. Once you set the information click the **Save** button at the bottom.

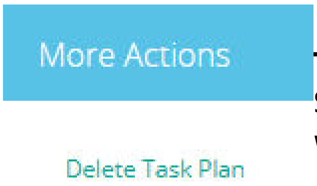
Edit Training Plans

To edit a **Training Plan** you simply have to click on the name of the **Training Plan** when in the **Training Plans** menu.

You can also use the search bar located at the top of any screen in **AccuTraining** to edit the **Training Plan**. When it appears in the search results simply click it to edit the **Training Plan**.

Delete Training Plans

Simply click the **Delete** link and confirm the deletion on the popup window to delete the **Training Plan** when in the **Training Plans** screen.

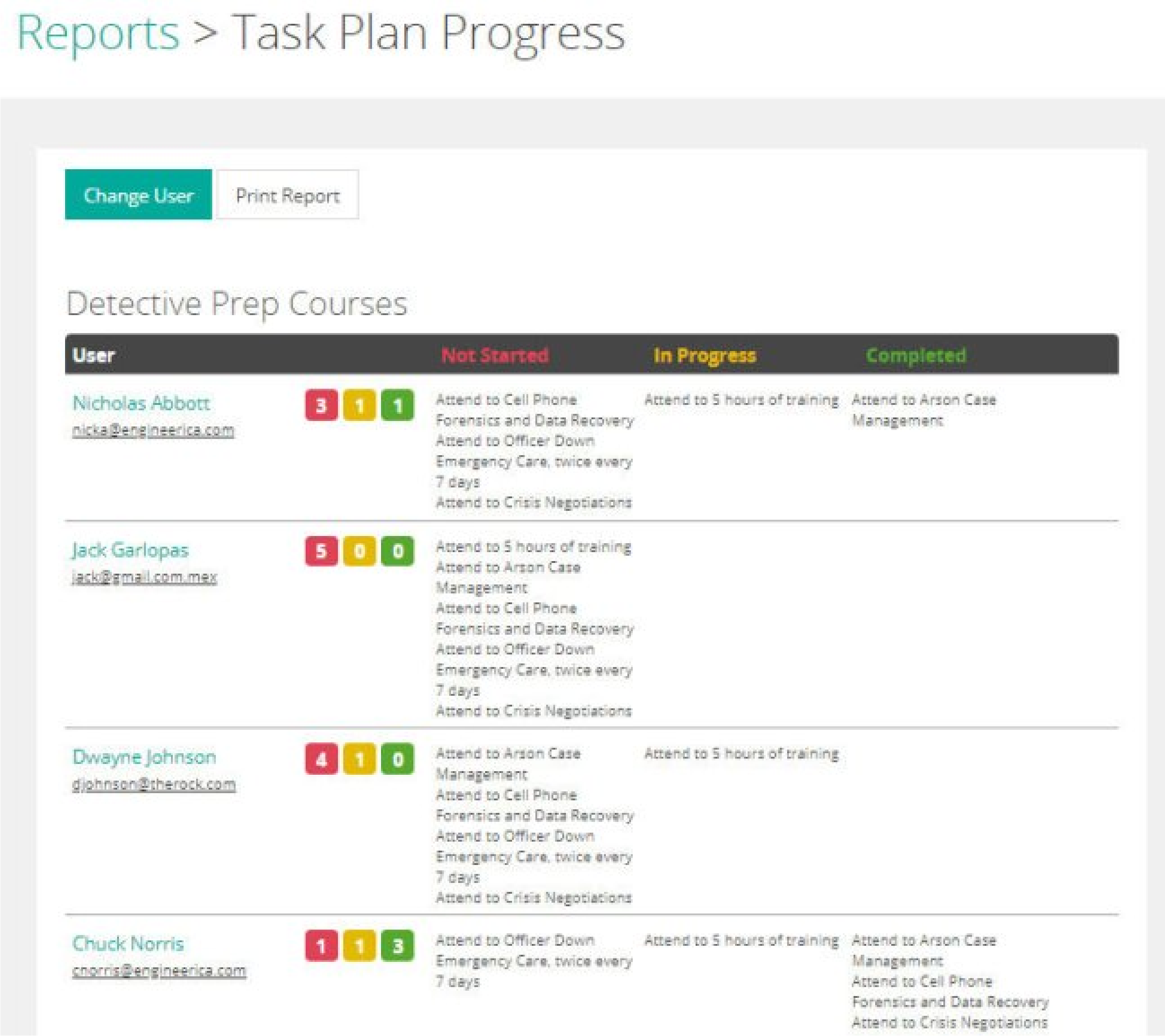


Additionally when editing a **Training Plan** you have the option to delete the **Training Plan** in a teal box located in the top right corner of the screen. Simply click **Delete Course** link and confirm the deletion on the popup window to delete the **Training Plan**.

Training Plan Progress Reports

This can be accessed from the **Progress Reports** link in the list of **Training Plans** on the **Training Plans** screen. Here you'll notice you can see exactly where everyone who is assigned this **Training Plan** is using a traffic light coloring system as follows:

- **RED** - This means that the person has **Not Started** on this these tasks listed here.
- **YELLOW** - This means that the person is **In Progress** on these tasks listed here.
- **GREEN** - This means that the person has **Completed** these tasks listed here.



Reports

In this section you can access all the Reports for **AccuTraining**. Here is a list of the available reports with a brief explanation of each type and individual report:

Session Registration Reports

These are reports that show the **Session Registration** to your **Training Courses**.

Registration and attendance

Shows the registration and the attendance for a specific session.

Training Plan Reports

These are reports that show the **Training Plans** status by the **Employee Groups** assigned or individuals.

Training plan progress

Displays the training progress for everyone in a plan.

Training progress by employee

Displays the training progress for a specific employee.

Employee Reports

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.

Visit Reports

These are reports that show the visits/swipes/attendance in the **Training Courses** in many various ways. Some are summaries while others are detailed so run them to see which meet your reporting needs.

Location general stats

Shows the general stats of a specific location.

Employee attendance

Shows the attendance information of an employee.

Summary of Attendance

The report gives you a summary of the number of non-unique students seen and 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 users' first visits.

Session Comments

This report shows user 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 visits' time.

Visits Executive Summary

The report gives you an executive summary of visits to a location, including 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, total contact hours.

Zero Visits

This report lists each user that didn't visit your center during the reporting period.

Task Plan Reports

These are reports that show the **Task Plan** progress by the individuals assigned these **Tasks**.

Individual Tasks by User

Shows the tasks assigned to the students, the assigned date, deadline date, whether the item was completed, and if so, the completion date. You can also see total items assigned per student, the overall completion rate, and the percentage of items that were completed within the deadline.

Previous: Home Screen | **Table of Contents** | **~Back to Top~** | **Next: Visits**