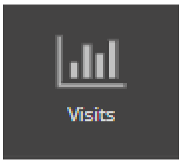
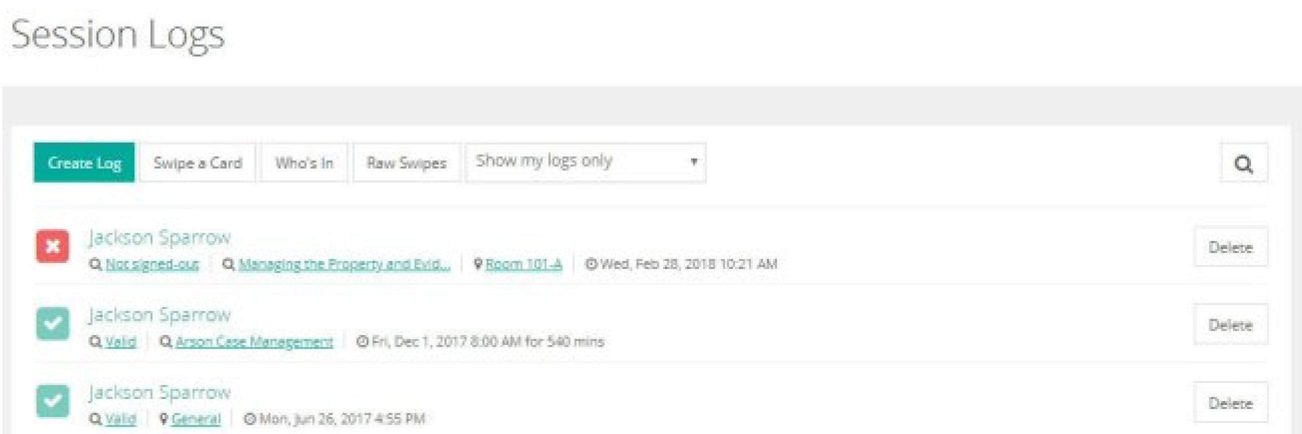
Visits



This section is dedicated to allowing you to view, edit, and completely manage your training attendance through a simple yet robust interface.

Session Logs

In this section you can view, edit, and cleanup your attendance data for the **Employee** training.



When viewing the **Session Logs** they are in chronological order but you can show only certain days but clicking the **Search: Today** button in the top right corner and changing the date to the date you want to see the **Session Logs**.

This area can be viewed as **All Session Log**s or from **My Session Logs**. Here is the differences explained:

All Session Logs

Displays all the **Users** or **Employees** that you have access to view the **Session Logs** for in **AccuTraining**. **Employees** with no **Admin** role will never be able to view this section.

My Session Logs

Displays all the **Session Logs** for your own attendance in **AccuTraining**.

Create a Session Log

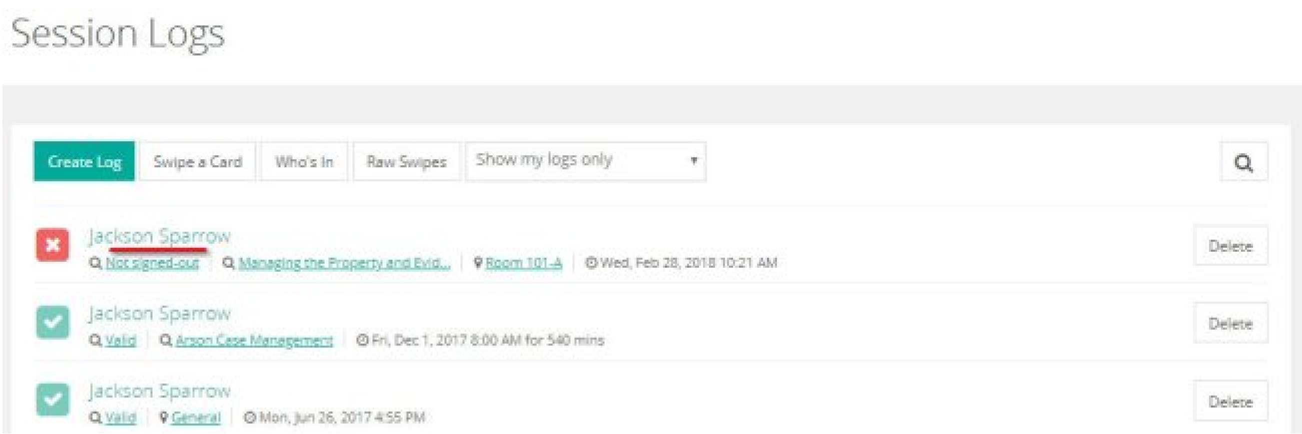
This can be done easily by clicking the **Create Log** button in the top left corner of the **Session Log** screen. Once there fill out and complete these fields to create an **Session Log**.

- **Employee** - Type the first 3 letters at least to get an **Employee** to show up and click to select that **Employee**.
- **Location** - This is the **Location** the **Training Course** took place in.
- **Training Course** - This is the **Training Course** that the **Employee** attended.
- **In / Out** - This is the times in and out that the **Employee** stayed for during the training. This will determine their status in the **Training Course** based on your account settings and rules for this **Training Course**. To add a time in or out do the following:
  1. Select either **IN** or **OUT** in the first drop-down menu.
  2. Click the date field and select a date on the popup calendar.
  3. Click the time field and type in the time or select one from the drop-down menu.
  4. Click the green plus symbol (**+**) to add the in/out swipe.
- **Timeline** - This is simply a view of the **Employees Session Log** that will be generated when you save this record.

After this is completed be sure to click the **Save** button at the bottom.

Edit a Session Log

To edit an **Session Log** simply click on the name of the **Employee** which is easily identified as a teal highlighted link in the list of the **Session Logs**.



Once there you have all the same fields as if you were creating the log. You can change any of the information on the log including **Employee**, **Location**, **Training Course**, and add/remove **In / Out** swipes.

Notice that if you want to remove a **In / Out** swipe there is a red ball symbol (•) that you can click to remove the swipe.

As well If you want to add a swipe that is missing to the **Session Log** you can do the following:

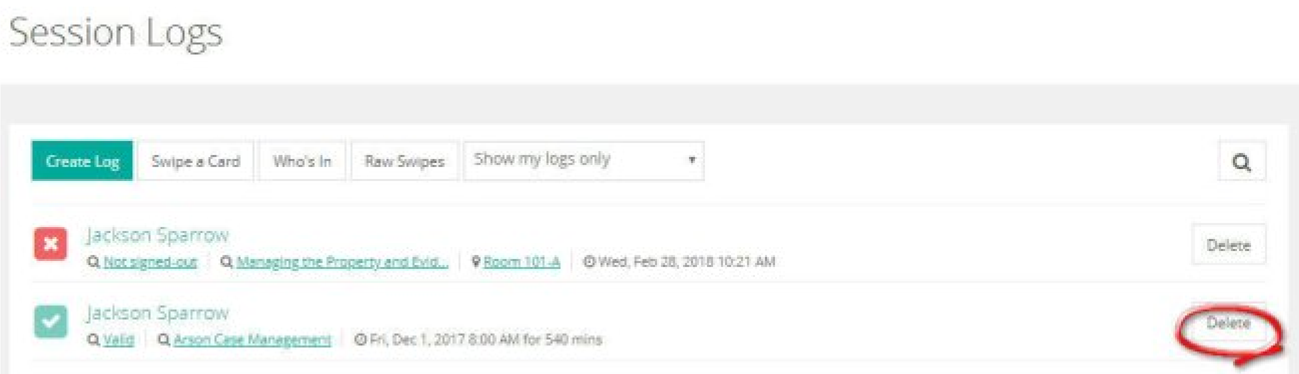
1. Select either **IN** or **OUT** in the first drop-down menu.
2. Click the date field and select a date on the popup calendar.
3. Click the time field and type in the time or select one from the drop-down menu.
4. Then click the green plus symbol (+) to add the in/out swipe.

Once you make the changes you can click the [Refresh] link to update the **Timeline** and see the changes you have made.

Finally be sure to save your changes to the **Session Log** by clicking the **Save** button at the bottom.

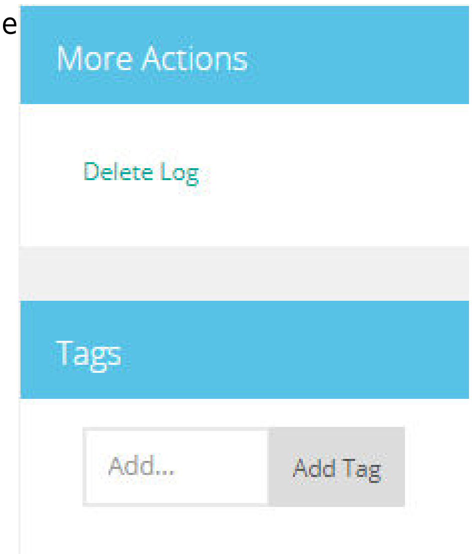
Delete a Session Log

You can delete a log that may have been an error by simply clicking the **Delete** link on the far right side of the list of **Session Logs** on the **Session Logs** screen.



Deleting the Log is permanent and cannot be restored so be sure that this is something you want to do. If you accidentally delete a lot of the logs please contact us.

Alternatively you can also view the **Session Log** first by clicking the name of the **Employee** on the **Session Log** and then click the **Delete Log** link in the teal box on the top-right corner of the **View Log** screen.



Swipe a Card

In this section you can "Swipe a card" or "Scan a barcode" or simply "Type in a Card" from this screen. What is great is you can swipe **Employees** cards and set the **Training Course**, **Location** for the swipes, and even choose if signing people in or out.

Fill-out the following information to create a card swipe:

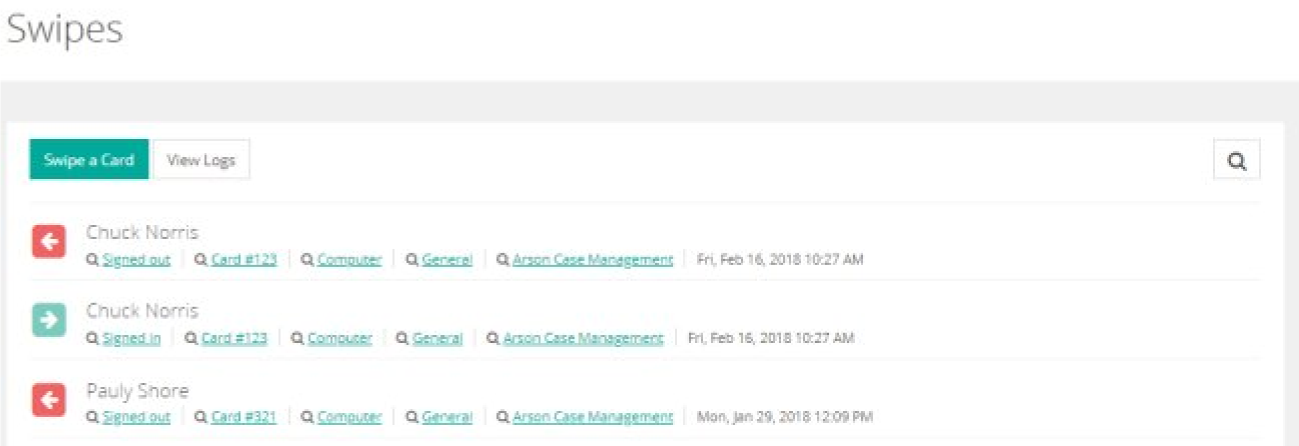
- **Swipe Type** - Set whether a swipe in or out.
- **Location** - Set the place where the training is taking place.
- **Training Course** - Assign the swipe in/out to a particular course.
- **Card Number** - This is where you swipe, type, or scan the barcode in.

Be sure to click the **Save and Swipe Again** to retain each swipe.

Employees, **Locations**, and **Training Courses** must already exist to use this section.

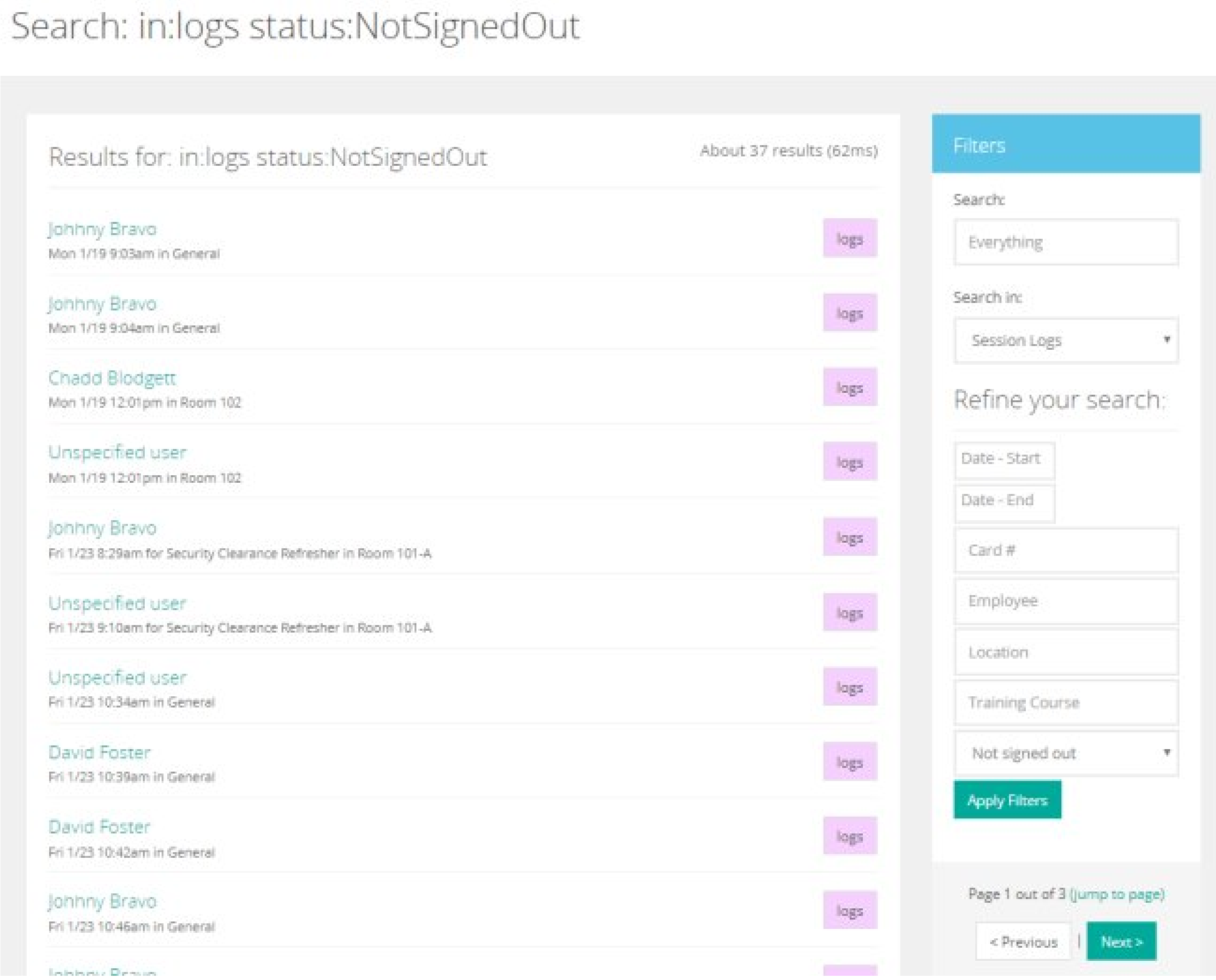
View Raw Swipes

In this section you'll be able to see the individual swipes to determine when someone swiped in chronological order. If there are unknown swipes you'll see these as well as shown below:



Filter Logs

By pressing the **Filter Logs (Magnifying Glass)** button on the top-right corner of the **Session Logs** screen you can quickly see any logs that may be an issue that you need to fix or for whatever reason you need to filter this list. Notice that when you do so you get a list of options to filter the **Session Logs**.



To correct the issues in **AccuTraining Session Logs** there are several errors that can occur in **Employees** attendance.

- **Search** - Use this area to enter text specific to what you are searching for in the **Session Logs**.
- **Search in:** - Use this option to limit the areas of **AccuTraining** the search looks into for the **Session Logs**.
  - **All Results** - The default option not filtering the search on any specified area.
  - **Assigned Tasks** - The option to filter **Session Logs** related to a specified **Assigned Task**.
  - **Tasks** - The option to filter the search related to a specified **Task**.
  - **Task Packs** - The option to filter the search related to a specified **Task Pack**.
  - **Task Types** - The option to filter the search related to a specified **Task Type**.
  - **Departments** - The option to filter the search related to a specified **Department**.
  - **Training Courses** - The option to filter the search related to a specified **Training Course**.
  - **Locations** - The option to filter the search related to a specified **Location**.
  - **Session Logs** - The option to filter the search related to a specified set of **Session Logs**.
  - **Swipes** - The option to filter the search related to a specified set of **Swipes**.
  - **Training Plans** - The option to filter the search related to a specified **Training Plan**.
  - **Terms** - The option to filter the search related to a specified reporting **Term**.
  - **Employee/User Groups** - The option to filter the search related to a specified **Employee/User Group**.
  - **Users (all)** - The option to filter the search related to a all **Users**.
  - **Users (only administrator)** - The option to filter the search related to a **Users** with the

  Administrator security role.
    - **Users (only employee)** - The option to filter the search related to a **Users** with the **Employee** security role.
    - **Users (only operator)** - The option to filter the search related to a **Users** with the **Operator** security role.
    - **Users *(only custom role*)*** - The option to filter the search related to a **Users** with a **Custom** security role.
      This option will not appear if no custom roles have been created in **AccuTraining.*
- **Date - Start** - Use this option to specify a **Start Date** of the search time period.
- **Date - End** - Use this option to specify a **End Date** of the search time period. This option can be omitted to go until the current time.
- **Card #** - Use this field to filter on a specified **Card Number** in the **Session Logs**.
- **Employee/User** - Use this field to filter on a specified **Employee/User** in the **Session Logs**.
- **Location** - Use this field to filter on a specified **Location** in the **Session Logs**.
- **Training Course** - Use this field to filter on a specified **Training Course** in the **Session Logs**.
- **Status** - If you click on the corresponding option in the **Status** drop-down you will see **Session Logs** that match the following criteria:
    - **Not Signed-In** - This is where an **Employee** forgets to swipe in for a **Training Course**.
    - **Not Signed-Out** - This is where an **Employee** forgets to swipe out for a **Training Course**.
    - **Stayed Less than Required** - This is where an **Employee** stays signed in for less that the required presence for a **Training Course**.
    - **Out of the Course** - This is where an **Employee** signs into a **Training Course** that they are not registered to attend.
    - **Other Invalid** - This is where an **Employee** has an error in swiping for a **Training Course**. **Examples:** An **Employee** signs-in twice, an **Employee** signs-in and out but then signs-in again but finally forgets to sign-out, etc.

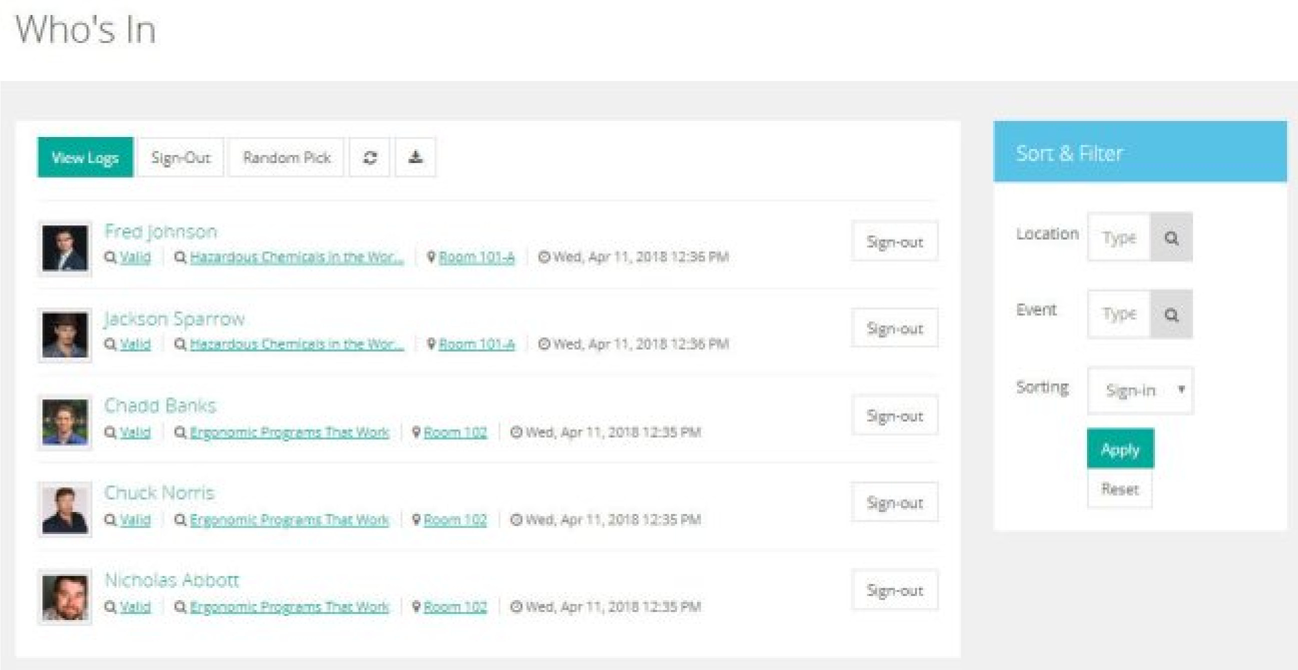
Once you've set all your search parameters simply click the **Apply Filters** button to see what results you get. Realize you may have to adjust them and click this button several times before you get to see exactly what you are looking for in the **Session Logs**.

As well at the bottom of this box (once you've applied the filters) you'll notice a **Page 1 out of X (jump to a page)** option appear with **Previous** and **Next** buttons. This will be so you can easily navigate through the several pages of search results you just obtained.

To exit out of the current filtered search results and view the unfiltered **Session Logs** again you can simply hit the back button on the browser.

Who's In

This area allows you to quickly see what **Employees** are signed-in to a particular **Training Course** and/or **Location**. In addition to viewing them you can also sign them all out or sign-out an **Employee** individually. A newly added tool is **Random Pick** used for random selection option which can be great for door prizes, random assignments selection, or other selection reasons.



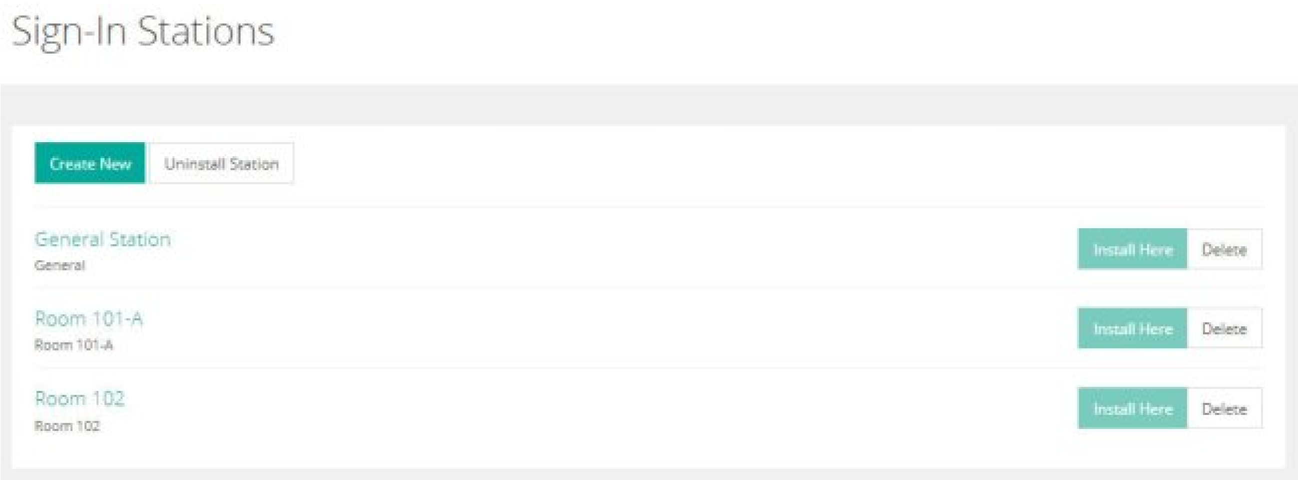
Sort & Filter the Who's In List

You can sort and filter the **Who's In** list as much or as little as you want to get the view exactly how you need it. These can be filtered based on a specific **Location** or **Event** and sorted based on **Sign-in times**, **First names**, or **Last names**.

Sign-In Stations

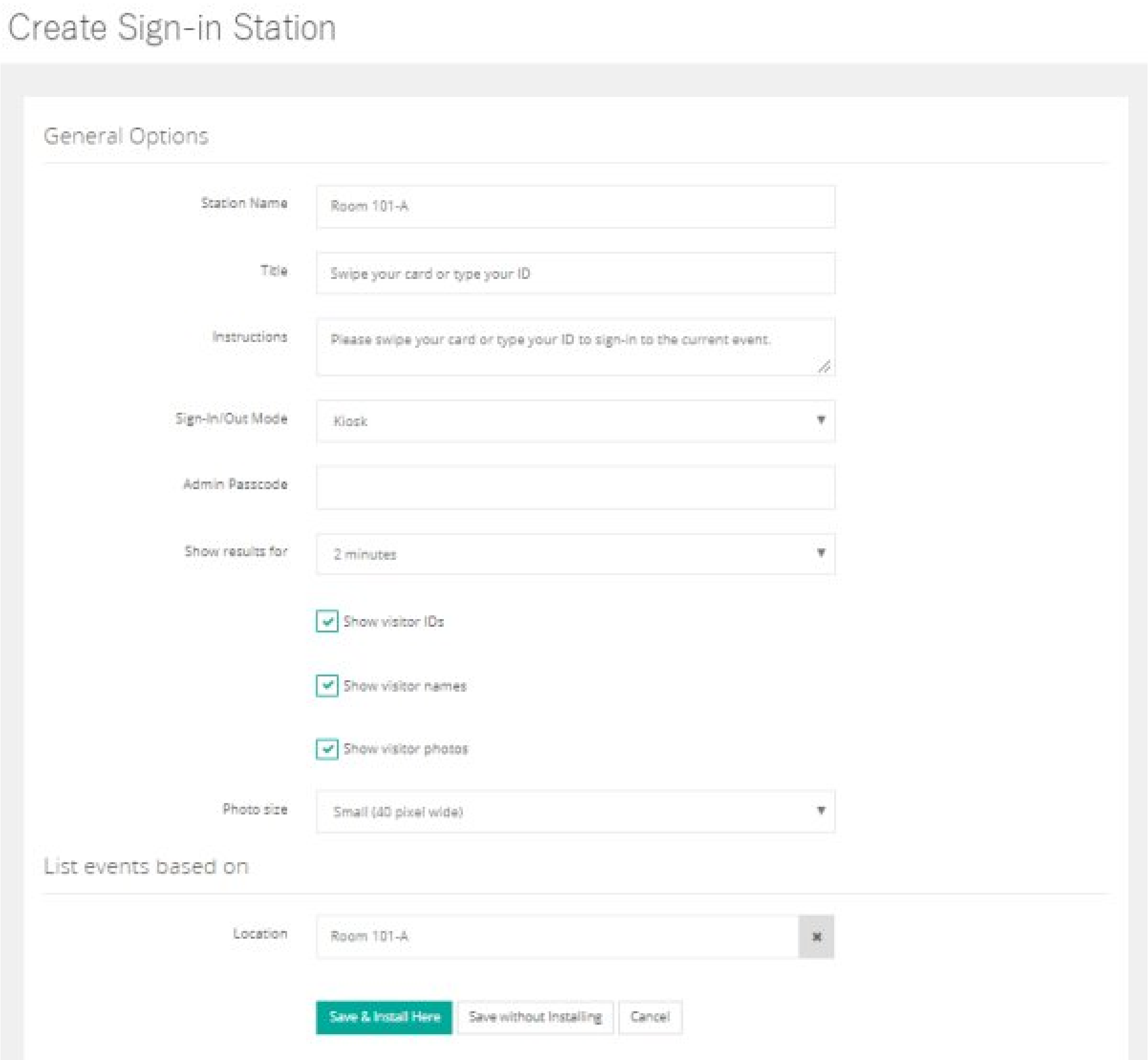
Sign-in Stations allow you to setup a designated computer that your **Employees** can Sign-in on to be credited for attendance. This can be setup via a web-enabled device using a browser such as on a Desktop PC, Laptop Computer, and/or a tablet or mobile device.

Assigning a computer or a device as a **Sign-in Station** is a completely separate process then using the **AccuTraining App** to record attendance. The **AccuTraining App** does not need to be setup here as a **Sign-in Station** because it is installed as a app on your Apple or Android device and will ask you what **Location** it is tracking.
Additionally the **AccuTraining App** can use the devices camera to scan **QR labels** because it is an installed app on your device versus just being designated as a **Sign-in Station** on the device's browser. These **Sign-in Stations** setup in this manner can accept only keyboard text entry or text from an additional ID reader being used. For more information about the **AccuTraining App** please visit:
https://www.engineerica.com/accutraining/accutraining-app



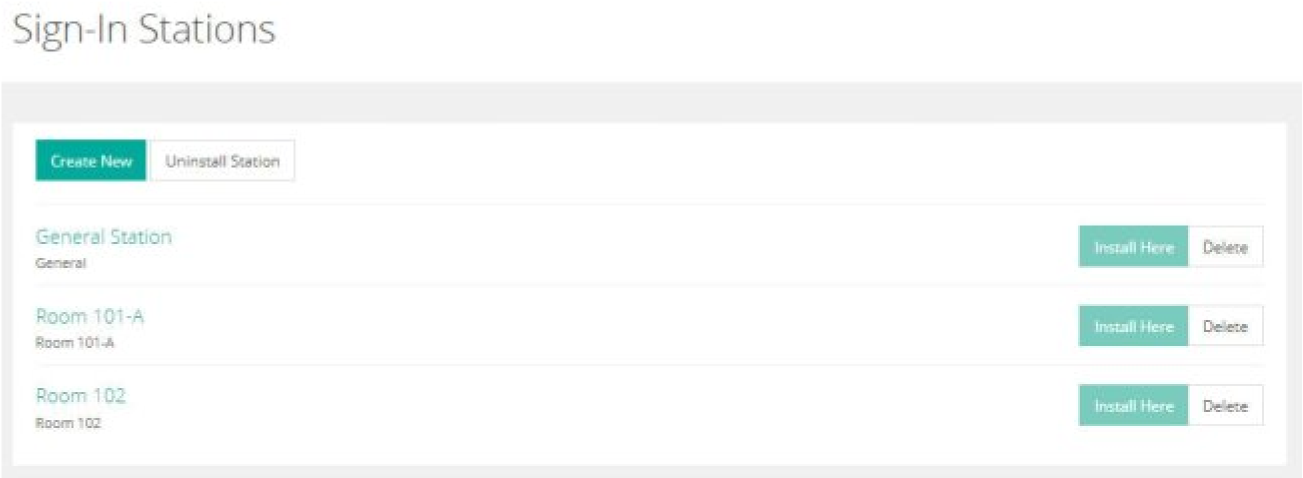
Create a Sign-In Station

1. Fill out the Sign-in Station information.
    - **Station Name:** This can be whatever you want to name the Sign-In Station. you could use the room name and the number of the Sign-in Station like Auditorium-Station01, Auditorium-Station02, Auditorium-Station03, or RM101-Station01, RM101-Station02, etc.
    - **Instructions:** This can be more detailed instructions but remember to keep it simple and short because the more information you have will make the Sign-In box appear lower on the screen.
        - **Mode:** - This gives you 2 available options Manual and Kiosk mode explained below:
            1. **Manual** - This allows the **Employees** to set whether they are signing in or out for their swipes.
            2. **Kiosk** - This allows the **AccuTraining** software to determine whether the swipe is a in or out.
    - **Admin Passcode(optional):** Enter an Admin Passcode to manage this Sign-in Station. If you do not want to add an Admin Passcode then you do not have to.
    - **Location (optional):** Set the **Location** where the Sign-in Station will be used.
2. Click the **Save & Install Here** or the **Save without Installing** button.
    - If you want to make this PC a Sign-in Station then click Save & Install Here otherwise if this is not the PC you want to make a Sign-in Station click Save without Installing.



Click the **Save & Install Here** Button if you are installing the sign-in station on the PC you are using or if you are just setting all of them up click the **Save without Installing** button

The Sign-in Stations you've created should now appear in the list of Sign-in Stations.



Delete a Sign-in Station

1. Click **Delete** on the end of the **Sign-In Station** listing to remove the **Sign-in Station**.

This is permanent and you do not get a confirmation popup so if you want to just want to remove this PC from being assigned as a **Sign-in Station** then click the **Uninstall** button to uninstall the **Sign-in Station**.

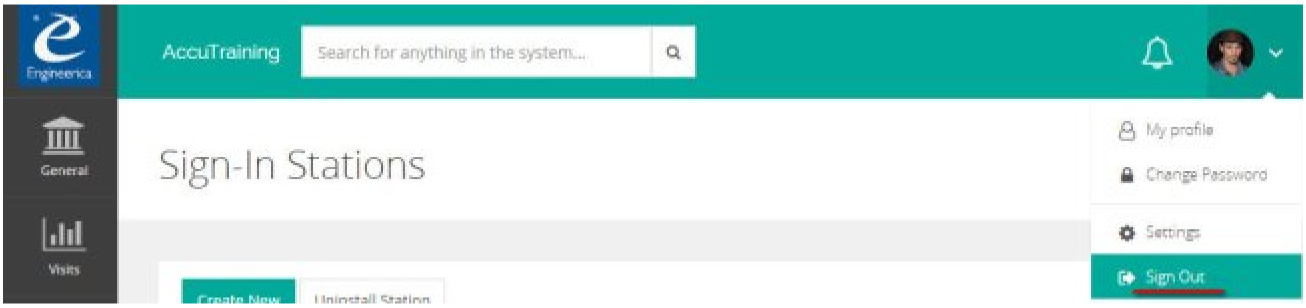
Uninstall a Sign-In Station

1. Click **Uninstall** button above the Sign-In Station list.

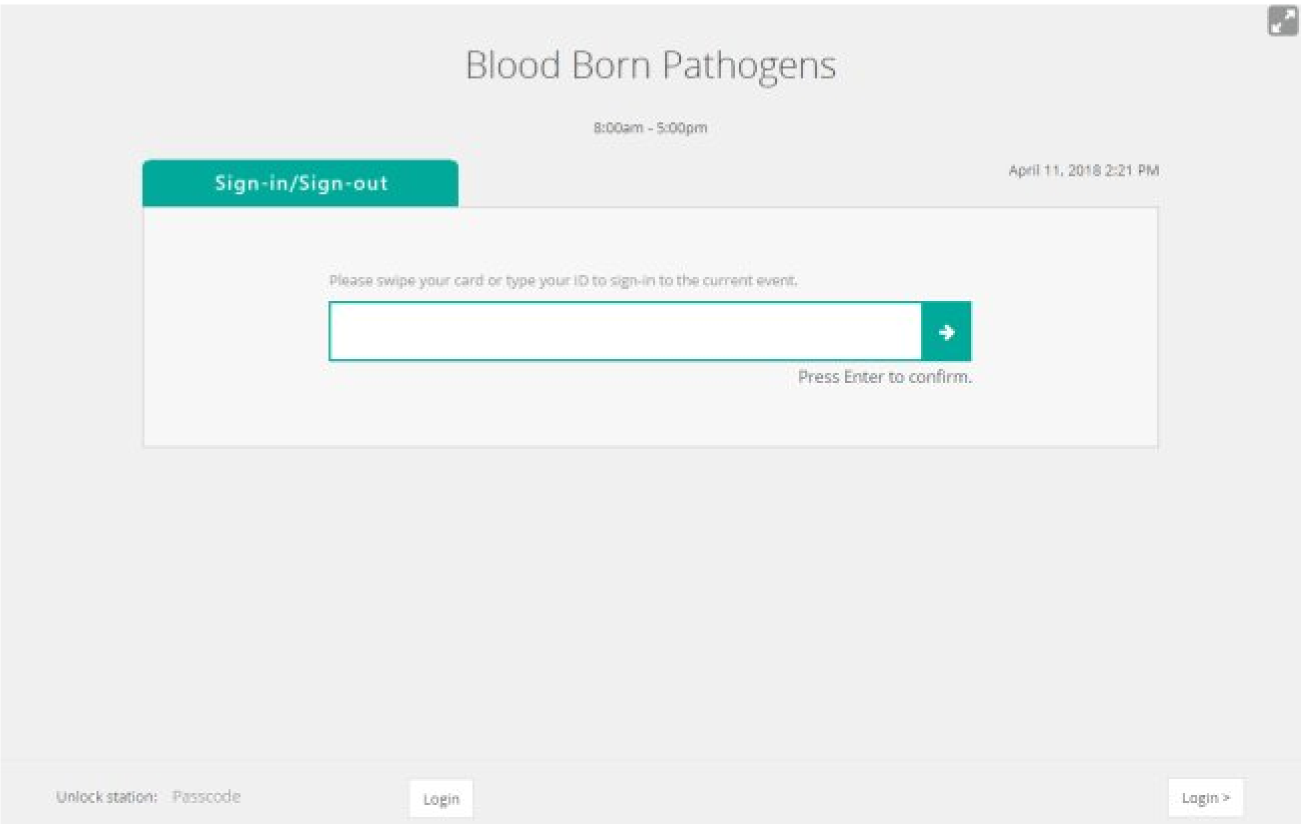
This option will only appear if you have designated this computer as a **Sign-in Station**.

Sign-in Station Mode

When you return to the home screen you should simply Logout in the top-right corner to switch to sign-in station mode. Click your name and then select **Logout**.



Here is a sample sign-in screen:



From the Sign-in Station click on the **Admin Options** at the bottom of the page if you want to get back to the main administration screen.

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.

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