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Due to our continuous effort for improving the software, some of the images or descriptions in this manual may not match your version of AccuCampus.

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About AccuCampus

The Engineerica Systems, Inc. team members are pleased to present their campus-wide student tracking software solution, AccuCampus, as a powerful solution for overall student success and completion goals. Engineerica Systems, Inc. is a highly successful software business established in the higher education market with novel software solutions for tracking student usage of college resources. Mon Nasser, the original developer of Engineerica's founding software titles, has led his company for the past 25 years in an endeavor to assist colleges and universities with the ever-increasing challenge to be accountable while uniquely supporting the success of their students.

The company focuses primarily on student tracking and as a result, Engineerica Systems, Inc. has highly functioning software products to offer educational institutions. This includes their cloud-based title AccuCampus, which is Engineerica's newest creation designed to comprehensively increase student engagement through collaboration, management, and assessment of student resources. We are confident here at Engineerica Systems, Inc. that your institution will be highly satisfied with the AccuCampus product and its features, as well as with Engineerica's professional support team. This team is comprised of the original programmers of the product, support technicians, and implementation specialists who are experts in both the software as well as the organizational needs of higher education institutions.

AccuCampus combines predictive analytics with comprehensive tracking features that not only allow your institution to analyze your services' effectiveness, but also make it easier to encourage participation among students and staff. The resulting increase in student usage of resources will optimize your students' ability to reach their academic goals. Furthermore, with the tracking data collected in AccuCampus, your institution will be better equipped to assess how resources impact your students' success.

AccuCampus Features and Capabilities

In their 20 years of experience making student tracking software, Engineerica Systems, Inc. set out to create a new industry leader of student utilization systems. The goal for this solution was to continue to offer all of the student traffic management tools and reporting capabilities of their previous titles with added student facing features. By allowing students to navigate all the university resources, Engineerica believes the students will be more likely to take their success into their own hands. AccuCampus can be accessed from any device and students can explore the resources offered to them on any campus through web-based applications as well as mobile apps. Customized rules and restrictions guide students to resources that will be most helpful to their unique needs. AccuCampus also allows staff members to create more formal nudges which become individual educational action plans for students.

It is important to understand that AccuCampus is not a silo of tracking data built to track certain students. Instead, AccuCampus stands to assist every student in their quest to be successful in their higher educational goals. AccuCampus begins tracking student usage of resources the minute a prospect shows interest in your institution. Students can use the system throughout their time at your institution regardless of their enrollment status (with appropriate restrictions) and continue to use the system well after they have graduated. The usability of AccuCampus extends beyond students and staff and offers a simple, unobtrusive way to engage faculty, parents, and even community members. Collaboration between these stakeholders is key if student success is to be addressed properly.

AccuCampus includes the following functionalities:

- **Extensive Implementation Services**: AccuCampus is fully supported by higher education professionals. Support includes implementation, training, and data needs determination assistance.
- **Full Technical Support:** Excellent technical support that shifts the support burden from your institution’s IT department to the dedicated AccuCampus experts.
- **Smart Predictive Analytics:** AccuCampus has the **only** analytics engine designed to predict completion based on student usage of services alongside traditional risk factors.
- **Campus Compass**: This unique feature in the AccuCampus system allows every student resource to broadcast their services to students and staff alike. Links show map point locations and access information like hours of business and best ways to gain access to the services. This feature is customizable to fit the varied needs of the multiple areas of your institution.
- **Individual Student Action Plans**: AccuCampus has a unique approach to retention in that the Action Plan feature that can be used to address the needs of every student, not just those considered at risk. Action items are completely customizable and can be attached to a student plan manually or automatically based on student attributes as well as student behavior with-in the system.
- **Unique and Unlimited User Profiles**: AccuCampus allows unlimited user profiles to be created where information can be stored under comprehensive permission levels.
- **Comprehensive Student Tracking**: Designed and based on our 20-year experience with academic center management software, the AccuCampus system can be deployed in

just about any student resource entity. Includes all the functionality needed to manage and track student visits from nearly any device.

- **Class Attendance Tracking**: Easily track class attendance where you need it. Use an Apple device (iPad, iPhone, or iPod touch), an ID reader, RFID technology, or even beacon technology to track and report on student attendance. Build rules and triggers based on attendance to address student needs like missed classes or extended illness.
- **Appointments**: Allow students to make appointments from anywhere, at any time, within parameters set by each individual area.
- **Resource Allocation**: Get the tools needed to best understand which resources have the most impact on student success. AccuCampus has robust reporting built into the system that will assist with the analysis of how resources are or are not helping students.
- **Dynamic User Roles and Permissions**: Institutional entities can decide on which student data is private and which can be shared. This is essential for collaboration with resources that deal with sensitive data like accessibility usage and/or behavior intervention.
- **Feedback System**: AccuCampus focuses on encouraging students to rate their experiences with locations, staff and services in a way that helps other students make the most of these campus resources.
- **Event Tracking**: Easily broadcast and then track attendance for events, workshops, seminars, etc. Events can be made visible to all students or to certain types of students. Sign-in kiosks display events automatically at the time of the event. Kiosks can be set-up on nearly any mobile device.
- **Notification Center**: Easily manage communication with all constituents as well as students in a way that makes students more likely to engage.
- **Workflow Tools**: Automate workflow using customized flagging tools that streamline the way all institutional entities handle student traffic. Ease the burden of record keeping on the front line workers through the use of wait lines, communication, appointments, and customized kiosk parameters.
- **AccuCampus Mobile Apps**: All users will have the ability to access the AccuCampus system via an Android and/or Apple mobile application.
- **Media Check Out**: AccuCampus provides a way for items to be checked out to users and can be organized by location.
- **Case load and Staff Load Balancing**: AccuCampus allows busy entities to apply case-loads and load balancing techniques to streamline the offering of services.

- **Ad-Hoc Queries and Reports:** Administrators can execute ad-hoc SQL queries directly to a pre-processed copy of our database and create ad-hoc reports and dashboards using Amazon Quicksight.

Platform

The AccuCampus system is delivered to the customer via a web-based platform hosted by Engineerica Systems using Amazon Web Services (AWS). Amazon Web Services has continuously exceeded uptime expectations and provides a plethora of security tools for our programmers. AccuCampus is developed and maintained by extremely qualified programmers with years of experience with our web-based tracking solutions.

Engineerica programmers ensure all of the back-end software is upgraded to the most recent versions to improve the overall system's performance, reliability and security. This includes Database Analysis Services which provide excellent performance, easy solution authoring, automated database management, enhanced relationships with bi-directional cross filtering, and parallel partition processing. The programing team maintains all of the services in order to continue to provide optimal database manageability, connectivity, usability and productivity. Cloud security at Amazon Web Services is the highest priority. As AWS customers, we benefit from a data center and network architecture built to meet the requirements of the most security-sensitive organizations. AWS cloud continues to allow us to scale and innovate, while maintaining a highly secure environment.

Additional steps to ensuring security include the application of data encryption at rest. Data is at rest when it is stored on a hard drive. In this relatively secure state, information is primarily protected by conventional perimeter-based defenses such as firewalls and anti-virus programs. However, these barriers are not impenetrable. Higher educational organizations benefit from additional layers of defense to protect student data from intruders in the event that the network is compromised. Encrypting databases is one of the best ways to ensure the security of data is at rest. Additional steps can also help, such as storing individual data elements in separate locations which further complicates any attempt at gaining access to complete data. Ultimately, this measure further ensures there is little chance that even in the event of a successful breach of the standard security measures in place, the attacker would have access to the data as it is still secured through encryption.

How to Master AccuCampus

As you may have gathered, AccuCampus offers a lot of functionality. We provide you with several ways to learn the software to choose from based on your learning style and circumstances, including:

- Knowledge Base: we offer a comprehensive knowledge base which covers both simple and complex topics within the system. The knowledge base is available at accu.help.
- AccuCampus Training Videos: how-to videos addressing common features and implementation steps are available online at https://www.youtube.com/user/engineerica.
- Video-conferencing: we are available to meet as needed for implementation and support throughout the lifetime of your AccuCampus subscription.
- Onsite Implementation: we offer 3-day onsite implementation services as requested for an additional fee. This offers a great option for in-person and hands-on training.

NOTE: If you are overwhelmed by the various functions that AccuCampus provides, start with the most important feature to you. As you get more comfortable with the software, you can then extend your usage to other features.

How to Use this Manual

The purpose of this manual is to give you a quick introduction to AccuCampus and to get you familiar with its main features. This manual does not cover all of the details of the software, but rather shows the big picture and how the various parts fit together.

This manual is divided into sections corresponding to the side menu. You can go directly to the section the section that interests you, or you can read all of the sections to get a feel for what the software can do. *These sections do not represent the order in which the software will be implemented!* Please keep in mind that you may not have access to all of the features listed depending on the permissions for your role within AccuCampus. Here is a list of those sections:

Setting up AccuCampus

Operating System

AccuCampus is entirely web based and can be accessed by any device with a browser and access to the internet, as well as through a mobile app for Apple and Android devices.

Implementation and Support

The Implementation Team believes in allowing each college and university guided flexibility during the initial roll out. Our approach to implementation is garnered from extensive experience and we have learned that expecting an institution to function in a highly restrictive implementation process does not result in high levels of buy in. Not only is every college and university extremely unique, their service entities are also unique. The requirements to on-board a counseling center will be massively different from on-boarding a fitness center. These truths are why the Implementation Team provides highly structured services with many ways that the college and the entities can customize when and how implementation takes place.

The Implementation Team will allow your institution to steer decisions in regard to how many and which service entities are brought into the system. The Implementation Team expects to provide you guidance in these decisions giving momentum and buy in priority. Timing and sequence of your individual implementation is often governed by the following factors for each office/department:

1. Availability of data to be imported
2. Reporting needs
3. Relationship to other offices/departments
4. Complexity and security needs
5. Readiness of the office/department staff members
6. Number of users and intensity of training needed

After the initial implementation process is complete, end users may contact support staff via an email ticketing system, or via the phone. AccuCampus licenses include unlimited technical and implementation support for the duration of the contract. There is no specific limit on how much time Engineerica's staff can devote to a client's AccuCampus account, however, limits may be in place for specific circumstances which require extensive time and effort. In these cases, additional charges would apply which would be discussed and agreed upon in advance.

Some Terms

Before we start exploring AccuCampus, we will need to define some of the terms we use throughout this manual.

User

Any individual who has a role within AccuCampus is considered a user. This can include students, staff, faculty and even community members. Each user is assigned a role within the system which determines which features they can access. Roles are completely customizable and consist of up to 300 individual permissions.

Course

Any regularly scheduled academic class is considered a course. We recommend that academic courses and their associated registration be imported into AccuCampus. This allows students to make appointments regarding specific courses, and faculty and staff to track class attendance.

Location

A location can be any department, center, room or entity on a college campus. Some examples include: a tutoring center, the English department, individual classrooms, etc. Locations can have services associated with them or not. If there are services associated with a location, it can appear in the Campus Compass and be used to search for appointment slots.

Service

A service is a resource that is offered by an entity on campus. This could include peer tutoring, assistance filling out the FAFSA or even using a computer lab. Within the Campus Compass, services allow students to identify resources they may need and where to find them. Students can also search for and make appointment based on services, and Action Items can be tied to services.

Campus Compass

The Campus Compass, sometimes referred to as simply, "Compass," is the main engagement feature of AccuCampus. It is a customizable, interactive flowchart which allows students to guide themselves to the resource they need by starting with a broad category which identifies their general group of needs, followed by a more specific service, and finally a specific location. Students may access the Compass through the mobile app or browser versions of AccuCampus. In both the browser and mobile app versions, they are able to make appointments through the Compass, and contact and visit the website of specific locations. Furthermore, in the mobile app, students may receive turn-by-turn walking directions to each location.

Community

AccuCampus Communities is the place where students can make use of the several benefits we have added: ask questions to their peers, share their class notes, use the classifieds section, take collaborative class notes, etc. The great advantage is that because it's part of AccuCampus, you can rest assured students interact only with other verified students from the university, making it safer for them.

Session Log

A session log is the official record of a meeting with a student. The log is created whenever a student signs into an appointment, a location or an event. Session Logs can also be created manually by users with permission. Within the session log, various information is recorded including the location the student attended, the course the student received assistance with, the service or services the student took advantage of, the staff member they worked with, notes entered by the staff member, and the in/out times.

Sign In Station

A sign-in station is the method of capturing all of the student tracking data. It is typically set up at the entrance to a location. Within AccuCampus, there are various options for setting up a sign-in station. These include a traditional computer based sign-in station with card reader, using the mobile app to scan QR or barcodes, or using a Bluetooth based beacon. Sign-in stations are browser based and can be scoped to specific locations, ensuring they are only visible to those staff members who need to see them.

Waiting Lines

Every office/department will have the ability to choose how/when a student can place themselves on a wait list. The traditional method is to use the wait line through a kiosk. AccuCampus allows the office/department to choose if a wait line will be based on the entire area, certain services, or certain staff members. Unique notifications are built into the process so that students can receive texts, emails, and/or push notifications in regard to their expected wait time and for when their turn is approaching. The office/department can allow students to move themselves down a wait list. Additionally, the office/department can choose to allow students to place themselves on a wait list via mobile app or web browser.

Swipes

Swipes are the main tracking feature for AccuCampus. When a student signs-in to a location or an event, they “swipe” in. This allows the system to register their presence at the location or event and create a record for their visit.

Action Item

Action Items are referrals or tasks that may be assigned to students and other users. These may include instructions to take advantage of tutoring and other services, forms that the student needs to fill out, or specific conversations they need to have with an advisor or counselor. Each location determines the language of the Action Items that direct students to them, as well as which roles can view or assign each item. When an Action Item is assigned to a user, it becomes a part of that user's Action Plan.

Action Pack

Action Items can be bundled together and assigned as an Action Pack. Once a user is assigned an Action Pack, they will automatically be assigned the first Action Item and triggers can be set up on the system’s backend which will automatically assign the next step whenever an Action Item is completed.

Appointment

AccuCampus offers appointment-scheduling abilities. Each location determines its own settings for appointments, which includes whether the area takes appointments, whether students can make their own appointments or if they must be made by a staff member, how long appointments can be, how often students can have appointments, and how many no-shows are allowed. In addition, each staff member’s shift can specify where the shift takes place, whether the staff member is available for walk-ins and/or appointments, and how many students the staff member can work with at a time.

Walk-In

AccuCampus allows users to sign-in to a location or event without an appointment as a walk-in. Each location determines its own settings for appointments and walk-ins.

Risk Scoring

AccuCampus features machine learning-based predictive analytics which factors in demographic and academic data imported from other data silos, as well as the student's tracking footprint and activity from within AccuCampus. This generates an algorithm that is unique to the institution and identifies potential risk factors that could lead to students not returning in the next term, and which recalculates every week as new information is added to the system. The risk score is viewable by staff with appropriate permissions, and can be used for outreach efforts.

Ad Hoc Queries

Ad Hoq Queries allow you to design your own reports using data within AccuCampus. The Ad Hoc Query only pull data from AccuCampus, and produce the results as a CSV file. Basic knowledge of SQL language is required to create an Ad Hoq Query.

Ad Hoc Reports

Ad Hoq Reports allow for customizable graphical interfaces, and can connect AccuCampus data with data from other silos, such as an Oracle database. Basic knowledge of Amazon Quicksight is required to build Ad Hoq Reports. Access to this feature is only available to one person per account. We recommend choosing a person who is familiar with AccuCampus and has a high enough security clearance at the institution to be able to handle sensitive data.

Media Items

AccuCampus offers Media Checkout, which allows for easy tracking and checking in/out of any items. Each college department/center/area is able to store a list of items to be checked out to users (generally but not limited to students). Users scoped to a location will be able to see items belonging to that location only. Item details include a unique code (which can be used for bar codes), title, type, location, notes, and shelf. When items are checked in and out and date/time is stored as well as the staff member who handled the transaction and the due date. User roles allow for some staff members to be restricted from the ability to check-in and out items. When appropriate, students can check items in and out for themselves.

Seminars

Within AccuCampus, Seminars refers to events. Events can be set up manually as recurring or one-time events, or imported for easy onboarding. Sign-in options for events include traditional sign-in stations (also used for center or class tracking), beacons to allow students to sign in from their phones, or QR codes which are sent to students ahead of time, and then scanned by staff members upon entry.

Administrator

The role that performs set up and maintenance tasks for the system. You can have as many administrator roles as you wish. You can further create and customize several administrator roles, for example by location, which allows that user to have administrator privileges, but only at a specific location within the system.

Student

The role typically assigned to students within the institution. The role is limited in what it can do and see.

Instructor/Faculty

The role typically assigned to any instructors or faculty within the institution. These role are limited in what they can do and see and can be further scoped by location. We recommend importing instructors/faculty in order to track class attendance and to allow your instructors/faculty participate in the early alert system. Instructors/faculty may also choose to utilize sign-in stations or manually create session logs for office hours, or other needs.

Staff

The role typically assigned to employees of the institution who are not students or instructors/faculty. These roles are limited in what they can do and see and are typically scoped by location.

Rules

Rules are used within AccuCampus to set automatic notifications, automatic Action Item assignment or completion, and to set attendance restrictions on locations or services. Rules are also set up to manage waitlists. Rules consist of a trigger, conditions (if applicable) and an action.

Attendance Restrictions

Within AccuCampus, attendance restrictions can be used to hide or show locations, services, and/or staff. This is done with the use of tags, which are unseen by the end user, and can be applied manually or automatically within the system. An example of this is a tutoring center that is only available to veterans. An tag would be placed on students with a veteran designation which would then be used to ensure that only veterans are directed to the location within the Campus Compass, and that only veterans can sign-in and utilize the services at the location.

Notifications

Triggered or on-demand notifications to students can be sent via text message, email, or onscreen/push messages which can appear in the AccuCampus mobile app or on the browser version. Messages can be sent to students individually, or to user groups such as cohorts. Additionally, all notifications are completely customizable.

User Profile

User details are stored as profiles in AccuCampus and can contain standard data from the SIS, LMS, or other data silo. Profiles are unlimited and can be set as visible or invisible for any user role.

QR Code/Barcode

A QR code is a machine-readable code consisting of an array of black and white squares, typically used for storing URLs or other information for reading by the camera on a smartphone. A barcode is a machine-readable code in the form of numbers and a pattern of parallel lines of varying widths, printed on and identifying a product.

First Steps

Before you can begin using the features of AccuCampus, the following settings must be established.

Logo/Time Zone/License Agreement/User Profile Settings

You must first upload your institution's logo and set up the Time Zone to the one you use. This sets the system to record the correct date and time when students sign-in/sign-out.

- On the **Main Sidebar**, hover over **Advanced Options**.
- Click **Settings**.
- Click **General**, half-way down the page.

- Logo: **Logo:** Click the **Upload Logo** button to select your image file (.jpg, bmp, png).
  - Click OK button once you select the image file on your computer.
- **Session Timeout**: if desired, enter a timeout limit for a user's session.
- **Time Zone:** Select your time zone from the drop down menu.
- **License Agreement**: If desired, enter a license agreement and choose if users need to accept it upon first login.
- **User Profile**: Choose whether users can edit their profiles.

- Click **Save**.

Semesters

Semesters are used to identify when your locations, services and courses are available. You will need to repeat these steps in order to create each new semester.

- On the **Main Sidebar**, hover over **Advanced Options**.
- Click **Settings**.
- Click **Semesters**, half-way down the page.
- Click **Create New**.
- Fill in the **Name**, **Start Date**, and **End Date**. We recommend following the same naming convention for all semesters. Make sure your naming convention can be easily understood by your users.
- Click **Save**.
- You'll now be asked to enter any **holidays/offtimes** that the **Locations** will be unavailable. A list of suggested days off will appear at the bottom of the screen that you can add by clicking. You can also add any other days as needed.
- Click **Save**.

Home Page Quick Panels

If desired, the home page can be customized with the following Quick Panel widgets:

- **HTML Content** - allows you to add text or images to the homepage.
- **RSS Feed Reader** - allows you to connect an RSS feed to the homepage. This can be used to display a rotating selection of notifications or news for the institution.
- **Notification** - displays a feed of all notifications sent to the user. User is able to click on a specific notification to get more information on it.
- **My Action Plan** - displays a feed of all action items sent to the user. User is able to click on a specific action item to get more information on it.
- **Upcoming Courses (Students)** - displays a feed of all course sessions that are upcoming for the next few days for a course that a student is registered for.

- **Courses Taking Place Now** - displays a feed of all courses that the user is registered for and that are currently in session at the time the user logs in.
- **Upcoming Courses (Staff)** - displays a feed of all course sessions that a staff member is registered for and that are upcoming for the next few days for a course. If a staff member is registered to a course group, shows all of the upcoming courses that belong to that course group.
- **Upcoming Appointments** - displays a feed of all upcoming scheduled appointments. User is able to click on a specific appointment to get more information on it.

To add a widget to your homepage, do the following:

- On the **Main Sidebar**, hover over **Advanced Options**.
- Click **Settings**.
- Click **Home Page Quick Panels**, half-way down the page.
- Click on either **Add Widget on the Left** or **Add Widget on the Right** to add a widget.
- Choose a widget to add.
- Enter a **Title** for the widget, if desired.
- Enter a **Sort Order** for the widget. This tells the system which order the widgets should appear on the screen if more than one is added.
- Select which **Roles** the widget will be visible to from the drop down menu. Or click **Add All** to make the widget visible to all users.
- Click **Save**.
- Repeat this process to add additional widgets.

Login Appearance

This information will show on your homepage when a user logs in.

- On the **Main Sidebar**, hover over **Advanced Options**.
- Click **Settings**.
- Click **Login Appearance**, half-way down the page.
- Enter the your institution’s name as **Account Title**.
- Enter **Instructions Text**, if desired.
- Enter your institution’s **E-mail Domain**.
- Choose the **Background** for your homepage. This can include shuffled images, a single image, or a custom image.
- Click **Save**.

Implementation Imports

Once these features are set up, you'll need to create imports from your institution's data silos, such as your SIS and LMS, containing the information you will want to be used for tracking. This includes a list of students, faculty, staff, services offered, courses offered, enrollment, etc. Below are our best practices for creating initial imports for set up. You can find additional information in AccuCampus by hovering over Advanced Options and selecting Imports.

In order to utilize AccuCampus to the fullest extent, you will need to import the following information at a minimum:

- Students
- Faculty
- Staff
- Profile Answers
- Services
- Courses

Depending on which aspects of AccuCampus your institution intends to use, you may also consider importing the following information versus manually building it by entity:

- User Groups
- Tags
- Compass Categories
- Seminars
- Media

General

Within this menu setting, you can find features for *Users*, *Courses*, *Locations*, *Services*, the *Campus Compass*, and *Campus Community*.

Users

To get to these features, from the **Main Sidebar** navigate to **General** > **Users**. From this page, you have several great features that you can access.

Create a New User

Before creating a new user, ALWAYS check to see if the user already exists in the system by searching their name, e-mail and user ID. Duplicate users can cause serious harm to your data!

- Click **Create New**.
- Enter the user's **First Name**, **Last Name**, **E-mail Address** and **Card Number**.
  - NOTE: we do not recommend assigning a password to users. Instead, we suggest allowing them to set the password themselves by clicking the "forgot password" link on the AccuCampus sign-in screen.
- If desired, enter the user's **Address** and **Phone Number**.
  - We recommend providing at least a mobile number so that the user may receive text alerts.
  - If your institution allows this, the user can log into AccuCampus and add this information themselves.
- Add the **Role(s)** the user will have. A user must have at least one role, but they can have unlimited additional roles. To delete a role later, click the minus sign next to the role.
- If desired, add a **Scope** for the user. This limits Staff, Administrator and Instructor/Faculty roles to the specified location for that user.
  - Note: For users who are both staff and students (such as Peer Tutors), adding a scope will not limit the student's ability to utilize other areas as a student or attendee. It will only prevent the user from performing staff-related tasks at other locations where they are not scoped.
- Click **Save**.

Request Password Change

This feature allows you to send an e-mail notification to a user, a group of users, or all users, requesting them to change their password.

- Click **Request Password Change**
- To send to **all users**:
  - Click **Send Requests**
- To send to **all users with a specific role**:
  - Select the **Role** from the drop down menu
  - Click **Send Requests**
- To send to a **specific user**:
  - Search for and select the **Specific User**
  - Click **Send Request(s)**

Send Message

Messages can be sent automatically through triggers; however, there may be times when you need to message users on demand, without a trigger. This feature is for on-demand messages.

- Click **Send Message**
- Search for and select **recipient(s)**
  - Note: You can message more than one user, or message an established group
- Enter a **Title** for the notification
- Choose how the message will be sent. More than one method may be selected.
  - **Onscreen (push)**: the user will receive a pop-up message when they log into AccuCampus, and on their phone as a push notification if they have the mobile app
    - Enter the **message**. We recommend that this message be kept short.
    - Choose the **Class**. This indicates how the message will appear and be classified.
    - Choose the **Duration**. This indicates how long the message displays onscreen.
    - **More Information**: indicates what will happen if the user taps the notification. This is optional.
    - **Show on Sign-in Station**: this will cause the notification to shown to the student when they next use a sign-in station at any location.

- **E-mail Message**: the user will receive an e-mail to the e-mail address on record within AccuCampus
  - Enter **Sender Name**. Make sure this is a name the user will recognize.
  - Enter **Reply To** e-mail address.
  - Enter **Subject Line**.
  - Enter **Text** of the message.
- **Text Message**: the user will receive a text message to the mobile phone number on record within AccuCampus. Please note that the number or name the message comes from will not indicate who you are, so make sure to identify yourself in the message.
  - Enter the **Message**.
- Click **Send Message**

User Groups

This feature allows you to create unique groups of students, staff or faculty which can then be used for reporting, messaging, managing attendance restrictions, etc. Groups can either be manually maintained (User Group) or automatically updated by the system (Dynamic Group.)

User Group

This type of group will need to be created and maintained manually.

- Click **User Groups**
- Click **Create New**
- Add a **Name** and **Description** for the group. We recommend making the name and description specific so that other users will understand what the group is.
- If desired, **Share** the group. The default is for the group to remain private and visible only to its creator.
  - Select **Roles with View Access**: these are roles who will be able to see your group and its members. Make sure to include your own role.
  - Select **Roles with Edit Access**: these are roles who will be able to edit your group and its members. Make sure to include your own role.
  - Add a **Scope**: this ensures that only users with a specific scope will be able to see the group and its members, regardless of their role.
- Click **Save**.

Dynamic Group

This type of group is automatically updated and maintained by the system based on an identifying feature of its members. The identifying feature is typically a profile or demographic value that will be imported or maintained within AccuCampus. Examples could include: students on academic probation, first year students, Chemistry majors, etc.

- Click **User Groups**
- Click **New Dynamic Group**
- Add a **Name** and **Description** for the group. We recommend making the name and description specific so that other users will understand what the group is.
- If desired, **Share** the group. The default is for the group to remain private and visible only to its creator.
    - Select **Roles with View Access**: these are roles who will be able to see your group and its members. Make sure to include your own role.
    - Select **Roles with Edit Access**: these are roles who will be able to edit your group and its members. Make sure to include your own role.
    - Add a **Scope**: this ensures that only users with a specific scope will be able to see the group and its members, regardless of their role.
- Select how often the group will **Refresh** from the drop down menu
- Select the **Condition(s)** that will apply to the group. This is how the system will identify the users who should be added or removed from the group when the refresh runs
- Set the group to either **Assign** or **Un-assign** a tag to its members depending on the purpose of the group. These will update every time the group refreshes.
- Click **Save**

More Actions

If you have the permission, you will be able to view a list of users from the main Users screen. For each individual user, you may have the following options. Each of these options is for the individual user and will take you to the respective page where that action takes place within AccuCampus. The options are role dependent – the options that show will vary by user.

- **Delete**: deletes the user from the system. ***We do not recommend deleting users under any circumstances!***
- Checkout Media
- Manage Groups

- Print Badge
- Print Certificate
- Print QR Label
- Request Password Change
- Send Message
- Session Registration
- Staff Availability
- Student Enrollment
- Upgrade User
- User Profile
- View Action Plans
- View Center Attendance
- View User Activity

User Profile

By clicking on a user on the main Users page, you will be taken to that user's profile. The profile is where all demographic and tracking information for the student lives. From this screen, depending on your permissions, you will be able to view a variety of information about the user on their main page including:

- Role(s) assigned to the user
- Card Number
- E-mail Address
- Risk Score
- Action Items assigned to the user
- Recent Visits
- Student Enrollment for the current semester
- Upcoming Appointments

You may also have access to all of the "More Actions" items listed above. These are located on the right hand of the screen.

You may have access to the Edit User page by clicking on the button at the top of the screen. In this page, you may be able to edit all of the demographic information of the user, the user's role and scope, tags that are assigned to the user, and the user's notifications preferences.

You may have access to the User Profile page by clicking on the link listed under More Actions. This contains all of the profile information that was imported for that individual user. Your view of that information will vary based on your own user role as all user profile information can be restricted by role and scope.

Courses

To get to these features, from the **Main Sidebar** navigate to **General** > **Courses**. From this page, you have several great features that you can access.

Create Course

We recommend importing courses rather than building them manually.

- Click **Create Course**
- Enter a **Full Unique Code** for the course. This cannot match any other course within AccuCampus for the chosen semester.
- Enter a **Name** for the course. This is the name that will display to users and should easily identify the course.
- Choose the **Semester** that the course will be offered.
- Choose the **College Department** that will offer the course
- If desired, enter a **Group** and **Details** for the course
    - **Group**: associates a course with other courses. This is useful for courses with multiple sections and allows reports to be run on all of those sections without having to individually select them.
    - **Details**: describes the course. This could include the catalog description of the course.
- Enter a **Schedule**. The schedule could be recurring or one-time. You can add more than one of each.
- Set **Attendance** settings.
    - **Attendance**: decide how early or late a student will be able to sign-in /out for the course
    - **Center Attendance**: decide if there is a required presence percentage and if students are required to sign out
    - **Class Attendance**: decide if class attendance will be taken for this course.
- Click Save

College Departments

This feature allows you to create departments with which courses , events or services will be associated.

- Click **College Departments**
- Click **Create Department**
- Enter **Name** and **Details** for the department

View Class Schedules

This feature allows you to search class schedules by Instructor, Student, or Location.

- Click **View Class Schedules**
- To search by:
    - **Instructor**: select the instructor using the search box and click **View This Schedule**
    - **Student**: select the student using the search box and click **View This Schedule**
    - **Location**: select the location using the search box and click **View This Schedule**
- You can then view the schedule week by week, as well as print the schedule

More Actions

If you have the permission, you will be able to view a list of courses from the main Courses screen. For each individual course, you may have the following options. Each of these options is for the individual course and will take you to the respective page where that action takes place within AccuCampus.

- Manage Instructor Registration – allows you to add or remove an instructor
- View Class Attendance
- View Session Logs
- View Student Registration

Locations

To get to these features, from the **Main Sidebar** navigate to **General** > **Locations**. From this page, you have several great features that you can access.

Create Locations

From this screen, you can create locations within AccuCampus. In this instance, location can refer to either the physical location (i.e. Academic Building Seven) or the entities within that physical location (i.e. the Office of Advising, which is located within Academic Building Seven.) In order for AccuCampus to be fully operational for your institution, you will need to include both types of locations.

- Click **Create Location**
- Enter a **Name** for the location. Remember, it can be either the name of the building or the name of the entity within the building depending on which you're building.
- Enter the **Location**. Use this if you are building an entity within a physical location. In the example above, the Office of Advising is the Name and Academic Building Seven is the Location.
- If desired, enter an **Order**. This tells the system which order to list this location relative to all of the others when a list is displayed.
- Enter **Contact Information**
    - **E-mail**: typically used for entities
    - **Web Site URL**: typically used for entities
    - **Street Address**: used for both entities and for physical locations. Allows students to receive turn-by-turn directions if being directed from the Campus Compass
- Enter **More Information**. That information could include business hours, phone numbers, specific instructions for accessing the location, etc.
- If desired, add an **Access Restriction**. This allows you to restrict access to the location to only those roles allowed into the entity or physical location.
- Enable **Silent Tracking** if you will be using beacons to silently track the traffic within the location without users needing to sign in/out.
- Click **Save**.

More Actions

If you have the permission, you will be able to view a list of locations from the main Locations screen. For each individual location, you may have the following options. Each of these options is for the individual location and will take you to the respective page where that action takes place within AccuCampus.

- Manage Services – allows you to associate services with this location

Services

To get to these features, from the **Main Sidebar** navigate to **General** > **Services**. From this page, you have several great features that you can access.

Create Service

You can either import services, or create them manually. The number of services you will be creating will determine which method you choose.

- Click **Create Service**
- Enter a **Name**. We recommend using broad language when possible. This allows a service to be associated with multiple locations.
- Enter a **Type**. This allows you to categorize services by topic. An example would be services with the following types: General (applicable to all locations), Academic Advising (applicable to services offered by advising offices), Admissions (applicable to services offered by the admissions office), etc.
- If desired, enter an **Order**. This tells the system which order to list this service relative to all of the others when a list is displayed.
- Enter a **Description**. We recommend using broad language when possible. This allows the service to be applicable to multiple locations or users.
- If desired, allow the service to show in the **Campus Compass**.
    - Select a **Compass Category** that the service should be associated with from the drop down menu. Note: Compass Categories must be created before they can be associated with a service.
- Click **Save**.

From this page, you can also determine the service's Location Availability or Delete the service altogether. These features are located in the menu on the right hand side of the screen.

- Click **Location Availability**
- **Add** or Remove locations for the individual service
    - A service can be associated with more than one location

Compass Categories

This is the main feature to set up your Campus Compass. Each category will be associated with services, which will then funnel students to the specific location they need in order to access the specific resource they need. Not all services need to be included in the Campus Compass. We recommend being thoughtful when deciding which categories and thus which services should be used. All categories should use broad language in order to act as the top of the funnel.

- Click **Compass Categories**
- Click **Create Category**
- Enter a **Name** for the category. We recommend using broad language that is from the student's perspective. Examples include: I need help paying for my education, I need help passing my classes, I need a to find a place to study, etc.
- Enter a **Description**. We recommend friendly and accessible language that gives a broad overview of the category.
- If desired, enter an **Order**. This tells the system which order to list this category relative to all of the others when the Campus Compass featured is opened.
- If desired, add an **Icon**.
- Click **Save**.

COMPASS

To get to this feature, from the **Main Sidebar** navigate to **General** > **Compass**.

COMMUNITY

To get to this feature, from the **Main Sidebar** navigate to **General** > **Community**.

REPORTS

To get to the reports related to Users, from the **Main Sidebar** navigate to **General** > **Reports**. All reports can be filtered and most can be memorized, scheduled, and downloaded as CSV, Excel or PDF. From the individual report, you may also be able to create a User Group or assign/unassign tags to users.

User List
Lists all users in the system, including name, card number and e-mail address. It can be filtered by group, role, specific user and/or tag.

User List with Tags
Lists all users in the system, including name, card number, e-mail address and tag. It can be filtered by group, role, specific user and/or tag.

Staff List
Lists all staff members in the system, including name, card number and e-mail address. It can be filtered by group, role, specific user and/or location.

Staff List by Service
Lists all staff members in the system, including name, card number and e-mail address. It can be filtered by group, role, specific user, location and/or service.

Permissions by User
Lists all the users in the system with their corresponding security permissions. It can be filtered by group, role, specific user and/or tag. ***This report can only be downloaded as CSV, no other features listed above apply.***

Center Visits
Within this menu setting, you can find features for *All Session Logs*, *My Logs*, *Who's In*, *Sign-in Stations*, and *Waiting Lines.*

ALL SESSION LOGS
To get to these features, from the **Main Sidebar** navigate to **Center Visits** > **All Session Logs**. From this page, you have several great features that you can access.

Create Log
Session Logs are automatically created when a user signs in via a sign-in station; however, they can also be created manually. This is useful for those locations without sign-in stations, or for when a user forgets to sign-in. If you have the permissions, you will be able to update and add to session logs at any time, even once the session has ended.

- Click **Create Log**

- Enter the **User** – this is the subject of the session log
    - If the user is unknown, click **User is Unknown**
- Select the role the user should be **Signed-In As**. The role can either be **Attendee** or **Staff**.
- Select the user's **Role**.
- Select the **Location** where the log takes place
- If applicable, select the **Course/Seminar** that the log is in reference to.
- If applicable, select the **Service** that the log is in reference to
- Select the **Staff** that the user is meeting with
- Add the **In** and **Out** times for the meeting
    - Remember to click the green plus button to save both the in and out swipes
- If desired, add **Comments** to the log. These can be kept private, or shared with the user.
- Click **Save Log**

Swipe a Card

This feature allows you to manually sign users in or out, regardless of whether a sign-in station is set up for a location. You are also able to see recent swipes from this screen.

- Click **Swipe a Card**
- Choose the **Swipe Type** – Sign-in or Sign-out
- Choose the **Location**
- If desired, choose a **Course**
- Enter the users **Card Number**
- Click **Save & Swipe Again**

Raw Swipes

This feature shows a record of all swipes within the system.

My Logs

To get to this feature, from the **Main Sidebar** navigate to **Center Visits** > **My Logs**. This feature will show all of the session logs that belong to you as a user. You will be able to open the individual log to view the details of that session. You will be able to add comments to the log and, depending on your permissions, you may or may not be able to edit the other information in the log.

Who's In

To get to this feature, from the **Main Sidebar** navigate to **Center Visits** > **Who's In**. This screen allows you to see all users currently signed in at a location and which location they are signed in to. You may also filter the record by location, and event and sort by first or last name.

Sign-Out

This feature allows you to manually sign users out of a location. You can either sign out an individual user by clicking **Sign-Out** next to the record of that user, or you can sign out all users by clicking the **Sign-Out** button at the top of the screen.

Random Pick

Sign-In Stations

To get to these features, from the **Main Sidebar** navigate to **Center Visits** > **Sign-In Stations**. From this page, you have several great features that you can access.

Create New

This feature allows you to create a new sign-in station for a location or an event.

- Click **Create New**
- Enter the **Station Name**
- Enter the **Title** – this is what will show to the user when they approach the sign-in station. It can be the same as the Station Name, or a different name if desired.
- Enter the **Instructions** – these will display to the user as they approach the sign-in station.
- Choose a **Tracking Mode**
  - **Center Attendance** – used for centers, departments, or other entities
  - **Class Attendance** – used for individual courses
- Choose a **Sign-in/Out Mode**
  - **Multi-step Kiosk** – allows the user to select additional options once they sign-in. This could include course, service, staff member, etc.
  - **Single-step Kiosk** – signs the user into a course or seminar based on the schedule of the location
  - **Manually Selected** – allows the staff member to manually select a specific course or seminar and have multiple attendees sign-in.

- If desired, add an **Admin Passcode**. This will restrict the ability of a user with permission to change the event or quickly enroll users if they don't have the passcode.
- If desired, set the following information to display on the sign-In station screen once a user signs-in. You can choose the length of time that the information will display
  - **Show Visitor IDs** – shows the user's card number
  - **Show Visitor Names** – shows the user's name
  - **Show Visitor Photos** – shows the user's photo (if imported into AccuCampus)
- Choose the **Location** where the sign-in station will be used.
- If desired, add a **Survey** to display upon sign-out.
- If desired, enable a **Beacon** as the sign-in station. You must first create a Beacon Profile before enabling this feature.
- Click one of two options:
  - **Save & Install Here** – saves the sign-in station and displays it within the browser you are using once you log out of AccuCampus
  - **Save without Installing** – saves the sign-in station only. This allows you to create the sign-in station on one device, but deploy it on another device.

Install Here

Once you have created a sign-in station, you can install it on any device through any browser. Click the **Install Here** button next to the sign-in station you wish to use and then log out of AccuCampus. The sign-in station will automatically display within the browser and can be used immediately. To uninstall the sign-in station, click Login at the bottom of the screen and navigate back to this page. You will then be able to click the **Uninstall** button at the top of the screen.

WAITING LINES

To get to these features, from the **Main Sidebar** navigate to **Center Visits** > **All Session Logs**. From this page, you have several great features that you can access.

Create Line

This feature allows you to create a waiting line for a location.

- Click Create Line
- Enter the Name of the line. This typically matches the location or sign-in station that the line will be associated with. It may also include the service, course or staff that the line is in regards to if Tracking Information is enabled.
- Select the Location of the line.

- Enter a Description of the line. We recommend being specific so that other users will understand what the line is for.
- Make the line Active.
- If desired, enable Tracking Information for the line. This feature allows a location to have multiple waiting lines running at once that are differentiated by service, course or staff member. The following options are available:
    - Service – users will be put in the corresponding line based on the service they select when they sign-in
    - Course – users will be put in the corresponding line based on the course they select when they sign in
    - Staff – users will be put in the corresponding line based on the staff member they select when they sign in
- If desired, enable Remote Access. This allows users to place themselves on the waiting line virtually via the mobile app.

Manage

Next to each individual wait line, there is a **Manage** button. This button allows you to manage the users who are currently in that wait line by signing them in, moving them up in the line or removing them from the line.

Reports

To get to the reports related to Centers, from the **Main Sidebar** navigate to **Center Visits** > **Reports**. All reports can be filtered and most can be memorized, scheduled, and downloaded as CSV, Excel or PDF. From the individual report, you may also be able to create a User Group or assign/unassign tags to users.

Location General Stats

This report shows the general stats of a specific location. It can be filtered by a date range and a location. ***This report can only be viewed in the browser, no other features listed above apply.***

Student Attendance

This report shows the session logs for a student. It can be filtered by date range, user, location and/or courses.

Summary of Attendance

This report gives you a summary of the number of non-unique students seen and their total time. It can be filtered by date range, group, role, specific user, location and/or course.

Detailed Attendance

This report provides detailed information about students and their attendance from their session logs. It can be filtered by date range, group, role, specific user, location, course/seminar, service, and/or staff member.

Attendance by Instructor

This report lists each instructor, the courses associated with that instructor and the students who signed-in to that course along with their sign-in information. It can be filtered by date range, group, instructor, role, specific attendee, location, course and/or service.

Visits by Service

This report lists each service along with the session log information for each student who accessed that service. It can be filtered by date range, group, role, specific attendee, location, service and/or course.

New Visitors

This report lists a user's first visit. It can be filtered by group, role, specific user, location, course and/or service.

Session Comments

This report shows all comments associated with a session log. It can be filtered by date range, group, role, specific user, location, service, course, courses in subjects, staff member and/or professor/instructor.

Staff Work Hours

This report lists the sign-in and out time for each staff member. It can be filtered by date range, group, role, specific user and/or location.

Users Helped by Staff

This report lists the users helped by each staff member. It can be filtered by date range, group, role, specific user, staff member, location and service.

Use of Services

This report generates a list of services for each user as well as session log information for that visit. It can be filtered by date range, group, role, specific user, staff member, location and/or service.

Sessions by Staff
This report lists each staff member seen during the reporting session, along with the course and the users that were signed in for that specific session. It can be filtered by date range, group, staff member, role, location and/or service.

Visits Detailed by Location
This report lists each user that visited the location during the reporting period along with basic attendance information. It can be filtered by date range, group, role, specific user, staff member, location, service, course and/or courses in subjects.

Visits by Staff Summary
This report provides a summary of non-unique users seen and total time for each staff member during the reporting period. It can be filtered by date range, group, role, staff member, location, service, course and/or courses in subjects.

Visits Executive Summary
This report provides an executive summary of visits to a location, including number of open days, number of services offered, number of users served and total contact hours. It can be filtered by date range, group, staff member, location, service, course and/or courses in subjects.

Zero Visits
This report lists each user that didn't visit your center during the reporting period. It can be filtered by date range, group, role, specific user, location and/or service.

Class Attendance
Within this menu setting, you can find features for *Roll Call*, *Attendance Sheet*, *Attendance Summary*, and *Unresolved Swipes*.

Roll Call
This feature allows a user to call roll for a course.

Attendance Sheet
This feature allows a user to view the attendance sheet for a specific course.

Attendance Summary

This feature allows a user to view an attendance summary for a specific course or all courses. You are able to search by course, group, attendee or date range.

Unresolved Swipes

This feature allows you to view all unresolved swipes within the system. This includes any user who's sign-in or sign-out is missing information. The swipe can be resolved by clicking the Resolve button next to the individual record and entering the missing information.

Action Plan

Within this menu setting, you can find features for *All Plans*, *My Plan*, *Action Items*, *Action Packs*, and *Action Types*. Action Items are the main early alert feature of AccuCampus. They can be used to prompt users to complete actions and can be automatically completed based on triggers within the system. All Action Items are completely customizable; however, we recommend being intentional in the type and number of items created in order to avoid overwhelming users.

All Plans

This feature allows you to search and view the Action Items assigned to an individual user. Simply search for the student to view any items assigned to that student. This includes active items, completed items and expired items.

My Plan

This feature allows a user to view all Action Items that have been assigned to them. This includes active items, completed items and expired items.

Action Items

From this screen, you can create new Action Items and assign currently existing items.

Create Action Item

You must create all Action Items manually. We recommend being intentional in your selection of Action Items in order to avoid overwhelming users with alerts.

- Click **Create Action Item**
- Enter the unique **Code** for the item.

- Enter the **Name** of the item. This is what will display to the user when the item is assigned.
- Enter a **Description** for the item. This will display to the user when the item is assigned. We recommend that the language be broad enough to apply to any user that may have the item assigned.
- Select an **Action Type**. Note that Action Types must be created before Action Items can be created.
- Set a **Duration** for the item. This is the amount of time that a user will have to complete the item.
- Set an **Expiration** for the item. This allows the item to expire after a set amount of time and prevents items from hanging out on a user's plan forever.
- If desired, select a **Service** that is associated with the item.
- If desired, select a **Course** that is associated with the item.
- If desired, select a **User** or **Users** who will be notified any time the item is assigned.
- Choose if the following options will apply to the item.
    - **Allow Multiple Assignment**: checking this box allows the item to be assigned to the same user multiple times, even if the first assignment hasn't been completed.
    - **Public for Student**: checking this box allows the user who has been assigned the item to see it on their Action Plan. Depending on the item and your institution's early alert policies, you will need to decide if students should be aware of Action Items placed on them.
- Choose if others will have **Access** to view or edit the item. This can further be limited by scope. The default is for Action Items to be visible to all users, regardless of role.
- Click **Save**.

Assign Action Item

From the Action Item screen, you will see a list of currently existing Action Items. The Action Items that are visible to you will depend on your role and the settings of individual Action Items.

- Choose an Action Item and click **Assign** next to the chosen item
- All of the above information from creating an Action Item will be populated. You are able to edit the following fields:
    - Choose to **Assign the item to a Student** or **Members of a Group**

- Enter the individual student or group
- If desired, modify the **Due On** date for the Action Item. The date showing will be the default date based on the set up of the Action Item.
- If desired, modify the **Expire On** date for the Action Item. The date showing will be the default date based on the set up of the Action Item.
- Choose if the item will **Autocomplete Based on Rules**. Note that a rule will need to be set up in Advanced Options which will trigger the autocompletion in order for this option to take place.
- Enter any **MyPlan Notes** for the user. These are specific notes to the user and can include any information necessary.
- Choose if the MyPlan Notes will be **Public for Student**. The default is for this to be checked and all notes to be visible. All notes written will be visible to the assigner and to any followers on the Action Item.
- If desired, add additional **Followers** for the Action Item. These are users who will be notified of any progress on the Action Item, including when it is completed.

- Click **Save**

Action Packs

Within AccuCampus, individual Action Items can be combined into an Action Pack. This allows you to set up a series of steps which will automatically assign to a user one by one as each step is completed. Examples of this would be an Action Pack related to incoming Freshmen who must complete a form, attend orientation, and arrange housing before starting school. Before creating an Action Pack, you will need to have created Action Items.

Create Action Packs

- Click **Create Action Pack**
- Enter a unique **Code** for the pack
- Enter a **Name** for the pack. This will show to users.
- Enter a **Description** for the pack. This will show to users.
- Choose the **Action Items** that will be included in the pack from the drop down menu.
- Click **Save**.

Assign Action Packs

From the Action Packs screen, you will see a list of currently existing Action Packs. The Action Packs that are visible to you will depend on your role.

- Choose an Action Pack and click **Assign** next to the chosen pack
- All of the above information from creating an Action Pack will be populated. You are able to edit the following fields:
    - **Select Attendee** – this is the user being assigned the Action Pack
    - Enter **Notes**
    - **For each individual Action Item in the pack:**
        - If desired, modify the **Due On** date for the item.
        - If desired, add an **Expire On** date for the item.
        - Choose if the individual Action Item will **Autocomplete Based on Rules**. Note that rules for each Action Item will need to be set up in Advanced Options which will trigger the autocompletion in order for this option to take place. The rules will also need to specify that the next item should be assigned.
        - Choose if each Action Item will be **Public for Student**.
- Click **Save**.

Action Types

Before Action Items can be created, you will first need to create Action Types. The types are completely customizable and will help organize your Action Items by category.

- Click **Create Action Type**
- Enter the **Name**. This will be visible to users who are creating Action Items, so make sure that the name is easily understood.
- Enter the **Description**. This will be visible to users who are creating Action Items, so make sure that the description is clear.
- Click **Save**

Reports

To get to the reports related to Action Items and Action Plans, from the **Main Sidebar** navigate to **Action Plan** > **Reports**. All reports can be filtered and most can be memorized, scheduled, and downloaded as CSV, Excel or PDF. From the individual report, you may also be able to create a User Group or assign/unassign tags to users.

Individual Action Plan by User

This report shows the action items assigned to users, along with the assigned date, due date, and completion progress. It can be filtered by date range, group, role, specific user, created by and/or action item.

Appointments

Within this menu setting, you can find features for *Make Appointment*, and *View All*. Users are able to download the AccuCampus Outlook Add-in from both of these pages. Instructions for how to do so are available in the Knowledge Base.

MAKING APPOINTMENTS

Users are able to make appointments for themselves via the web browser or via the mobile app. Appointments can also be created manually by another user depending on their permissions. The individual settings concerning appointments at a given location are determined by settings in Advanced Options.

Search By Service

Users are able to make an appointment based on a specific service. The user's ability to make an appointment is based on their role, the location's appointment settings, and any attendance restrictions that may exist for the user and/or the location, staff or service.

- Click **Search by Service**
- Search for the specific **Service** needed. Popular searches are listed below the search box and can be clicked.
- Select a **Location** from the list of locations where that service is offered. This list is populated based on your role and any attendance restrictions that may exist for you and/or the location or service.
- Click **Make Appointment**
    - Note: you may also **Send E-mail** to or Visit Website of the location to discuss your concerns or to set up an appointment (if directed to do so)
- The **Location**, **Semester** and **Service** will automatically be populated from the previous screens.
- Choose the **Period** (date range) during which you want an appointment
- **Student**

    - If the student is making an appointment for themselves, this information will already be populated
    - If someone is making an appointment for a student, this will need to be entered
- If needed, select **Course** from the drop down menu. These will populate based on the user's current registration.
- Click either **Search By Staff** or **Search By Date**. Note that Search by Date is limited to a seven day period; however, any seven day period may be selected.
- Choose the **Staff Member** and **Date/Time** for the appointment from the populated list
- Verify that all information is correct
- If desired, add **Notes**. These will be visible to the staff member the appointment will be with.
- Click **Save**. You will receive a confirmation screen that the appointment has been successfully made.

Search By Location

Users are able to make an appointment based on a specific location. The user's ability to make an appointment is based on their role, the location's appointment settings, and any attendance restrictions that may exist for the user and/or the location, staff or service.

- Click **Search by Location**
- Search for the specific **Location** desired. Popular searches are listed below the search box and can be clicked.
- Select a **Location** from the list of locations where that service is offered. This list is populated based on your role and any attendance restrictions that may exist for you and/or the location or service.
- Click **Make Appointment**
    - Note: you may also **Send E-mail** to or Visit Website of the location to discuss your concerns or to set up an appointment (if directed to do so)
- The **Location** and **Semester** will automatically be populated from the previous screens.
- Choose the **Period** (date range) during which you want an appointment
- **Student**
    - If the student is making an appointment for themselves, this information will already be populated
    - If someone is making an appointment for a student, this will need to be entered

- If needed, select **Course** from the drop down menu. These will populate based on the user's current registration.
- If desired, select a specific **Staff** member.
- Click either **Search By Staff** or **Search By Date**. Note that Search by Date is limited to a seven day period; however, any seven day period may be selected.
- Choose the **Staff Member** and **Date/Time** for the appointment from the populated list
- Verify that all information is correct
- If desired, add **Notes**. These will be visible to the staff member the appointment will be with.
- Click **Save**. You will receive a confirmation screen that the appointment has been successfully made.

Create Manually

Appointments can be made manually by any user with permissions. The appointment can be made for themselves or for others. The user's ability to make an appointment is based on their role, the location's appointment settings, and any attendance restrictions that may exist for the user, the attendee and/or the location, staff or service.

- Click **Create Manually**
- Enter the **Location**
- **Semester** will automatically populate
- Select the **Date** of the appointment. If this is left blank, you will need to Search Available Slots.
- Select the **Duration** of the appointment. This will default to the location's specific appointment settings, but can be modified.
- Select the **Student** who will attend the appointment. Users with the correct permissions can select themselves.
- Select the **Staff Member** the appointment will be with. If this is left blank, you will need to Search Available Slots.
- If needed, select the **Service**
- If needed, select the **Course**
- If desired, add **Notes**. These will be visible to the staff member the appointment will be with.
- Click **Save** or click **Search Available Slots**

- If searching available slots, you'll be taken to the same screens as above and will be able to Search by Staff or Date. You will then select a staff member and day/time, verify information and click save.

View All

From this page, you will be able to view all appointments available to your role. This may only be your own appointments or appointments scheduled with you, or it may be all appointments at a specific location, or it could be all appointments currently in the system.

More Actions

If you have the permission, you will be able to view a list of appointments from the main Appointments screen. For each individual appointment, you may have the following options. Each of these options is for the individual appointment and will take you to the respective page where that action takes place within AccuCampus.

- Cancel – cancel the individual appointment
- Edit – edit the information of the individual appointment, including rescheduling the appointment
- Mark as No-Show
- Mark as Show – typically used if the student didn't swipe in for the appointment
- Restore – restore a previously canceled appointment
- Void – voids the appointment

Reports

To get to the reports related to appointments, from the **Main Sidebar** navigate to **Appointments** > **Reports**. All reports can be filtered and most can be memorized, scheduled, and downloaded as CSV, Excel or PDF. From the individual report, you may also be able to create a User Group or assign/unassign tags to users.

Scheduled Appointments

This report shows all of the scheduled appointments grouped by staff member. It lists the status of the appointment and if the attendee showed up. It can be filtered by date range, status, group, staff member, role, specific attendee, location, course and/or service.

Daily Appointments

This report shows all of the scheduled appointments grouped by day and staff member. It lists the status of the appointment and if the attendee showed up. It can be filtered by date range, status, group, staff member, role, specific attendee, location, course and/or service.

Institutional Research

Within this menu setting, you can find features for *Risk Scoring*, *Ad-Hoc Queries*, *Ad-Hoc Reports*, and *Reports*.

Risk Scoring

U with permission are able to create risk assessment models, which use machine learning-based predictive analytics to create a unique algorithm that combines demographic, academic, and tracking data to produce a risk score for each student and which recalculates each week as new information is uploaded. For more information about this feature, please contact your Engineerica representative.

Ad-Hoc Queries

AccuCampus offers users with permissions the ability to create Ad Hoc Queries. Ad Hoq Queries allow you to design your own reports using data within AccuCampus. The Ad Hoc Query only pulls data from AccuCampus, and produces the results as a CSV file. Basic knowledge of SQL language is required to create an Ad Hoq Query. We recommend choosing an individual to manage both Ad Hoq Queries and Reports (or one person for Reports and several for Queries) who is familiar with AccuCampus and has a high enough security clearance at the institution to be able to handle sensitive data. The user or users should have training in SQL and Quicksight.

Ad-Hoc Reports

Ad Hoq Reports allow for customizable graphical interfaces, and can connect AccuCampus data with data from other silos, such as an Oracle database. Basic knowledge of Amazon Quicksight is required to build Ad Hoq Reports. We recommend choosing an individual to manage both Ad Hoq Queries and Reports (or one person for Reports and several for Queries) who is familiar with AccuCampus and has a high enough security clearance at the institution to be able to handle sensitive data. The user or users should have training in SQL and Quicksight.

Reports

To get to the reports related to risk scoring, from the **Main Sidebar** navigate to **Institutional Research** > **Reports**. All reports can be filtered and most can be memorized, scheduled, and downloaded as CSV, Excel or PDF. From the individual report, you may also be able to create a User Group or assign/unassign tags to users.

User Risk List

This report lists the current risk of every user in the system. It can be filtered by group, role, specific user, tag, risk assessment model, minimum risk and/or maximum risk.

User Risk History

This report lists the historical risk of every user in the system. It can be filtered by date range, group, role, specific user, tag and/or risk assessment model.

Media

Within this menu setting, you can find features for *Media Items*, *History*, and *Check-In/Out*.

MEDIA ITEMS

From this page, you'll be able to create media items that can then be checked in/out. Before creating media items, you will need to create media types to help categorize and organize your items. Finally, on this page you can check in and check out already created media items based on your permissions.

Create Media

Before you create a media item, you will first need to create media types. If you have a large amount of media items, we recommend importing this information rather than building it manually.

- Click **Create Media**
- Enter a unique **Code** for the item
- Enter the **Title** for the item. We recommend making this unique so that multiples of the same media type can be identified during check in/out. One way to do so is by entering a barcode number or ID number for the item.
- Select a **Media Type**
- Select a Location where the media item will be available
- If desired, enter **Notes** about the item. This could include specific instructions about the item, or reminders to staff about the process for checking the item in/out.
- Click **Active** to allow the item to be checked out
- Select a **Checkout Period** for the item. This could be in hours, days or weeks.

- If desired, put in a **Shelf** location for the media item. This is the specific location where the media item can be found at your location.
- Click **Save**

Media Types

All media items have a type assigned to them. This allows you to categorize and organize your items within the system across locations.

- Click **Media Types**
- Click **Create Media Type**
- Enter the **Name** of the media type. Examples would be textbook, laptop, calculator, etc.
- Enter a **Checkout Period** for that media type. This is a general time limit and can be modified within individual media items as they are created.
- Click **Save**

History

From this page, you will be able to view a history of all check in and check outs of all media items. You are also able to view the individual notes for each record by clicking **View**.

Check-In/Out

From this page, you are able to search for and check in/out media items. If desired, you can filter media items by location.

Checking Items In

- **If filtering by Location**, search for and enter a specific location.
  - Select the **Media Item** you need from the drop down box
- **If not filtering by Location**, search for and select the **Media Item** you need from the drop down box.
  - All of the information regarding the item's check-out will be populated
- Click **Check In** at the bottom of the page

Checking Items Out

- **If filtering by Location**, search for and enter a specific location.
  - Select the **Media Item** you need from the drop down box
- **If not filtering by Location**, search for and select the **Media Item** you need from the drop down box
- Enter the **Attendee** who will be checking out the media item.

- If desired, enter **Notes** about the Check Out
- Click **Check Out**

REPORTS

To get to the reports related to media items, from the **Main Sidebar** navigate to **Media** > **Reports**. All reports can be filtered and most can be memorized, scheduled, and downloaded as CSV, Excel or PDF. From the individual report, you may also be able to create a User Group or assign/unassign tags to users.

Media List

This report shows all media items available in the system. It can be filtered by media item, media type, location and/or staff member.

Late Media

This report shows all currently checked-out media items. It can be filtered by date range, group, role, specific user, media item and/or location.

Media Checkouts

This report shows the check-out information for all media items currently checked out. It can be filtered by date range, group, role, specific user, media item, media type and/or location.

Events

Within this menu setting, you can find features for *Seminars*, *Badges*, *Certificates*, and *QR Labels*.

SEMINARS

All non-course events within AccuCampus are called Seminars. Seminars can be recurring or standalone. From this page, you can create a seminar and manually add attendees. Non-administrator users can add themselves to scheduled seminars by going to **General** > **Register for Seminars**.

Create Seminar

- Click Create Seminar
- Enter a **Full Unique Code** for the seminar. As with courses, this cannot match any other course within AccuCampus for the chosen semester.
- Enter a **Name** for the seminar. This displays to the user when they search for the seminar.

- Select the **Semester** when the seminar will take place.
- If desired, select the **College Department** that the seminar will be associated with.
- If desired, enter a **Group** for the seminar. This will associate a seminar with other seminars. This is useful for seminars with multiple sections and allows reports to be run on all of those sections without having to individually select them.
- Enter **Details** for the seminar. We recommend entering a description of the event or important information about the event in this space. This will display to users when they search for the seminar.
- Enter a **Schedule**. The schedule could be recurring or one-time. You can add more than one of each.
- Set **Attendance** settings.
  - **Attendance**: decide how early or late an attendee will be able to sign-in /out for the seminar
  - **Center Attendance**: decide if there is a required presence percentage and if attendees are required to sign out
- Click **Save**

Session Registration

- Click **Session Registration**
- Search for the **Seminar**. Ensure that you are selected the event from the correct semester if it is offered more than once.
- Search for the date of the **Seminar**.
- Click **View Sessions**. A new page will open showing the registration information for the seminar.
- To add a user, search for the user and click **Add User**.
- To remove a user, click on the **minus** button next to the user's name

BADGES

If your event will need name badges for your attendees, you are able to design, print and e-mail them from this page.

Templates

From this page, you are able to create and design a badge template. This is a two-step process – you will need to first create and name a badge template, and then design it. You are also able to modify an existing badge template if you need to update badges from a previous event.

- Click **Templates**
- Click **Create Badge Template**
- Enter a **Name** for the template. We recommend you make this specific so that other users will recognize it.
- Enter a **Description** for the template. We recommend you make this specific so that other users will recognize it.
- Click **Save and Design**
- Use the **Toolbox** to create a badge from scratch
- Click **From Template** to create a badge from a canned basic template form
- Click **Save**

Print

From this page, you are able to print badges for attendees.

- Click **Print**
- Select a **Badge Template** from the drop down menu
- Select **All Users** to generate the badges from that template
- If desired, filter badges by those that have not been printed yet (**Only Modified After Badges were Printed Last Time**)
- If desired, filter badges by a specific date and time (**Only Modified After**)
- If desired, filter the badges by **User Role**
- If desired, print **All Badges**
- If desired, only print badges for **Specific Users**
    - You will need to specify the user or users
- Click **Generate Badges**. The badges will be downloaded as a single PDF file to be printed.

E-Mail

From this page, you are able to create images of badges to e-mail to attendees.

- Click **E-mail**
- Select a **Badge Template** from the drop down menu
- Select **All Users** to generate the badges from that template
- If desired, filter badges by those that have not been printed yet (**Only Modified After Badges were Printed Last Time**)
- If desired, filter badges by a specific date and time (**Only Modified After**)
- If desired, filter the badges by **User Role**
- If desired, print **All Badges**

- If desired, only print badges for **Specific Users**
    - You will need to specify the user or users
- Click **E-mail**. The badges will be downloaded as an individual PDF file for each badge.

CERTIFICATES

Templates

From this page, you are able to create and design certificates. This is a two-step process – you will need to first create and name a certificate template, and then design it. You are also able to modify an existing certificate template if you need to update certificates from a previous event.

- Click **Templates**
- Click **Create Certificate Template**
- Enter a **Name** for the template. We recommend you make this specific so that other users will recognize it.
- Enter a **Description** for the template. We recommend you make this specific so that other users will recognize it.
- Click **Save and Design**
- A selection of canned templates will appear. Click on the desired template.
    - If desired, download a **Sample PDF**
    - If you want to use this template, click **Use This Template**
    - To return to the list of templates, click **View all Templates**
- Use the **Toolbox** to modify the template
- Click **Save**

Print

From this page, you are able to print certificates for attendees.

- Click **Print**
- Select a **Certificate Template** from the drop down menu
- Select **All Users** to generate the certificates from that template
- If desired, filter the certificates by **User Role**
- If desired, print **All Certificates**
- If desired, only print certificates for **Specific Users**
    - You will need to specify the user or users
- Click **Generate.** The certificates will be downloaded as a single PDF file to be printed.

E-Mail

From this page, you are able to create images of certificates to e-mail to attendees.

- Click **E-mail**
- Select a **Certificate Template** from the drop down menu
- Select **All Users** to generate the certificates from that template
- If desired, filter the certificates by **User Role**
- If desired, print **All Certificates**
- If desired, only print badges for **Specific Users**
  - You will need to specify the user or users
- Click **E-mail**. The certificates will be downloaded as an individual PDF file for each badge.

QR Labels

From this page, you are able to generate a QR code for a user or group of users. The code will be unique for each user. The label can be printed or e-mailed to the user or users.

- Search for and select a **User**
- Search for and select a **Group**
- Click **Print**
- Click **View QR Labels**

Advanced Options

Within this menu setting, you can find features for *My Memorized Reports*, *My Scheduled Reports*, *Export*, *Import*, and *Settings*.

My Memorized Reports

From this page, you are able to run any reports you have previously memorized. In order to memorize a report, you will need to go to the reports page, run the report with any filters you need, and then click **Save Report**.

My Scheduled Reports

From this page, you are able to schedule a previously memorized report to run on a specific schedule.

Create New

Before you create a scheduled report, you must first have memorized a report.

- Click **Create New**
- Enter a **Name** for the report. We recommend being specific so that you and any users who will receive the report will know what it contains
- Enter **Details** for the report. We recommend being specific in your description of the report so that you and any other users will know what it contains.
- Click **Active**
- Enter a **Start Date** for the schedule to begin
- Enter an **End Date** for the schedule to end
- Enter a **Time** for the report to run
- Enter the **Frequency** that you'd like the report to run
- Enter the **Date Range** for the report
- Search for and add the **Report** that you would like to schedule
- If desired, you can **e-mail** the report to yourself or other users. To do so, follow these steps:
    - Enter the **Recipient(s)**
    - Enter the **Send to Address** for the recipient(s)
    - If desired, click **Send to Me** to have the report e-mailed to yourself
    - Enter the **From Name**
    - Enter the **Reply To** e-mail address
    - If desired, enter a **Password for Attachments**. The user or users will need this password to open the report.
    - Enter a **Subject** and **Body** for the e-mail
- Click **Save**

Export

From this page, you are able to export data from AccuCampus. You are able to download your information in CSV, HTML or Excel formats using the filters provided. Additionally, you can view all past exports by clicking **View Past Exports** at the top of the page.

Import

From this page, you are able to import data from your other data silos into AccuCampus. Documentation about how to do so is available by clicking **View Documentation**.

Settings

From this page, you are able to access all of the advanced settings for AccuCampus. This includes creating semesters, user roles, user profiles and more. Each item below is restricted by user roles and permissions.

Appointments

Within this page, you are able to set global settings for appointments as well as location-based settings for them. The global settings are the default for the entire system. In order for a location to have settings different from the default, they must change the settings on their specific location by changing the scope.

- Click **Appointments**
- Choose the **Scope** to edit settings for. The default is **Account**, which controls the global settings for all locations. To change the scope, click **Change** and select the **Location** you want to edit settings for. Make sure to click **Set Scope** once the location is selected.
- The following settings are able to be adjusted:
    - **Status**: Choose whether appointments will be allowed to be scheduled at all.
    - **Service Selection**: choose whether appointments will be tied to a service or not.
    - **Event Selection**: choose whether an event can be selected as part of an appointment.
    - **Staff Selection**: adds a filter to allow the attendee to select a specific staff member when scheduling an appointment. If unchecked, the attendee will be shown all available staff members.
    - **Allow Creating Appointments**: choose the time frames during which appointments can be made.
    - **Duration Restrictions**: choose the minimum and maximum length of appointments.
    - **Count Visit Towards Appointment**: allows you to set limits on how early or late an attendee can sign-in and still be counted as attending the appointment.
    - **Maximum Appointment Time Per Week**: allows you to set limits on the total amount of time an attendee or staff member can be in appointments.
    - **Maximum # Of Appointments Per Week**: allows you to set the maximum number of appointments per week that a staff member or attendee can attend.

  - **Appointment's Actions Restrictions**: allows you to set restrictions on editing, cancelling and restoring appointments by all users.
  - **No-Show Restrictions**: allows you to set limits on how many "no-shows" an attendee can have before they are no longer allowed to make appointments.
  - **Back To Back Restrictions**: allows you to create a time buffer between appointments.
  - **Group Appointment Restrictions**: allows you to decide if staff members must assist with events.
  - **Reminders**: triggers a reminder notice for appointments at a set time period prior to the appointment.
- Click **Save**

Attendance

Within this page, you are able to set global settings for attendance as well as location-based settings for it. The global settings are the default for the entire system. In order for a location to have settings different from the default, they must change the settings on their specific location by changing the scope.

- Click **Attendance**
- The following settings are able to be adjusted:
  - **General:** controls settings regarding session logs, specifically if users are automatically signed out, what the default session log time will be, etc.
  - **Courses:** allows you to set limits on how early or late an attendee can sign-in and still be counted as attending the course.
  - **Class Attendance:** allows you to customize the available attendance statuses and identify which action will be tied to which status.
- Click **Save**

Attendance Restrictions

Within this page, you are able to create restrictions which either hide or show locations, services or staff members from users based on a tag that has been placed on them. The restriction also causes a disallowed user to receive an error message if they attempt to sign-in for a restricted location, service or staff member stating that it is restricted to them.

- Click **Create Restriction**
- Enter a **Name** for the restriction. We recommend using a unique and specific name so that other users will understand what the restriction is for.

- Enter **Details** for the restriction. We recommend using a detailed description of what the restriction will do.
- Choose whether the restriction will be on **Locations**, **Services** or **Staff Members**.
- If desired, choose an **Order** for the restriction. If the restriction is set to show a location, service or staff member, this setting will determine the order in which it displays relative to other restricted spaces.
- Choose whether the restriction will **Show** or **Hide** the location, service or staff member from the user. Typically, restrictions are used to Hide vs. Show.
- Select the specific **Location(s)**, **Service(s)** and/or **Staff Member(s)** that should be hidden or shown. If restricting a service or a staff member, you are able to further restrict by location in order to set scope.
- Choose whether the restriction will be on users **With a Tag** or **Without a Tag**. An example would be a Veterans Success Center that is hidden from users without the Veteran tag.
- Select the **Specific Tag** that will be used to restrict the location, service or staff member.
- Click **Save**

Beacons

Within this page, you are able to create beacon profiles, manage the beacons' region, or disable beacon support for the account.

Create Beacon Profile

- Click **Create Beacon Profile**
- Enter a **Name** for the beacon. We recommend using a unique and specific name so that other users will understand what the beacon is for.
- Enter a **Description** for the beacon. We recommend using a detailed description of what the beacon will be used for.
- Choose the **Usage** of the beacon.
  - **Sign-In Stations:** used for signing in or out of courses, centers or events. All beacon profiles for sign-in stations will share the same region.
  - **Silent Tracking:** used to track traffic in an area. No specific details are captured. Every beacon profile for silent tracking must define its own region.
- Click **Active**.
- Enter the **Settings** for the beacon.

  - **Region ID:** if using the beacon as a sign-in station, do not edit. If using the beacon for silent tracking, either enter a unique identifier or leave this blank for one to be automatically generated.
  - **Major #:** choose a number between 0 and 65535. This number *cannot* match another beacon's profile.
  - **Minor #:** choose a number between 0 and 65535. This number **cannot** match another beacon's profile.
  - **Password:** if desired, enter a password for this beacon profile. In order to associate this password and profile with the beacon, you will first need to enter the default password (minew123). The beacon's password will then change to the password set here.
  - **Transmission Power:** choose the transmission range for the beacon. This determines how close a user needs to be to the beacon to connect to it. Larger transmission powers will affect battery life.
  - **Broadcasting Interval:** the default value is 900 milliseconds. Changing this can affect battery life.
- Click **Save.**

Manage Beacons Region

From this page, you can set the beacon range for all beacons used for sign-in stations.

Disable Beacon Support

From this page, you can disable beacon support completely. This means that beacons will not be able to be used on your AccuCampus account.

Compass

Within this page, you can select which user roles have access to the Campus Compass feature. You are also able to create a welcome pop-up for users when they log into AccuCampus.

Dead End Recording

From this page, you can enable Dead-End Recording. This feature allows you to receive feedback in text format from your users as they encounter dead-ends when looking for a service or location.

Event Session Registration

Within this page, you are able to adjust settings for events at four different levels – Global, Location-Specific, Seminar-Specific and Session-Specific. The settings are hierarchical.

Global Settings

The global settings control all events within the system. If no other levels are changed, these settings take precedence.

- Click **Global Settings**
- Choose if **Registration** for events is enabled or disabled for all events in the system.
- If desired, set a **Capacity** for all events in the system.
- If desired, set a **Trainer** for all events in the system.
- Choose the **Number of Days to Show Upcoming Events**. This sets how far ahead events will display to users.
- If desired, set a **Reminder** for events.
- If desired, set **how late an attendee can register** to an event relative to the event date.
- If desired, set **how early an attendee can register** to an event relative to the event date.
- If desired, set **how late an attendee can unregister** from an event relative to the event date.
- Click **Save**

Location-Specific Settings

The location settings control events at a specific location. Much like the appointment settings, this refines the event settings for your specific center or department and will only apply to that location.

- Search for and select a **Location**.
- Click **View Location Settings**.
- Choose if **Registration** for events is allowed. There are three settings:
    - **Use Default:** causes the location to default to whatever the global setting is.
    - **Enabled:** allows users to register to events for the location.
    - **Disabled:** doesn’t allow users to register for events for the location.
- If desired, set a **Capacity** for all events at the location.
- If desired, set a **Trainer** for all events at the location.
- If desired, set **how late an attendee can register** to an event relative to the event date.
- If desired, set **how early an attendee can register** to an event relative to the event date.
- If desired, set **how late an attendee can unregister** from an event relative to the event date.

- Click **Save**

Seminar-Specific Settings

The seminar-specific settings control a specific seminar.

- Search for and select a **Seminar**.
- Click **View Seminar Settings**.
- Choose if **Registration** for the seminar is allowed. There are three settings:
  - **Use Default:** causes the seminar to default to whatever the global setting is.
  - **Enabled:** allows users to register to the seminar.
  - **Disabled:** doesn't allow users to register for the seminar.
- If desired, set a **Capacity** for the seminar.
- If desired, set a **Trainer** for the seminar.
- If desired, set **how late an attendee can register** to the seminar relative to the event date.
- If desired, set **how early an attendee can register** to the seminar relative to the event date.
- If desired, set **how late an attendee can unregister** from the seminar relative to the event date.
- Click **Save**

Session-Specific Settings

The session-specific settings allow you to register users for the specific session of a seminar.

- Search for and select a **Seminar**.
- Search for and select a **Session Date**.
- Click **Find Sessions**.
- Search for and **add a user**.

General

Within this page, you can add your institution's logo and set up the Time Zone to the one you use. This sets the system to record the correct date and time when students sign-in/sign-out. You're also able to set a session timeout, add a license agreement, and choose if users are able to edit their own demographic information on their profiles.

- Click **General**, half-way down the page.
  - **Logo:** Click the **Upload Logo** button to select your image file (.jpg, bmp, png).
    - Click OK button once you select the image file on your computer.
  - **Session Timeout**: if desired, enter a timeout limit for a user's session.
  - **Time Zone:** Select your time zone from the drop down menu.
  - **License Agreement**: If desired, enter a license agreement and choose if users need to accept it upon first login.
  - **User Profile**: Choose whether users can edit their profiles.
- Click **Save**.

Home Page Quick Panels

Within this page, you are able to customize your home page by adding quick panel widgets.

- Click **Home Page Quick Panels**.
- Click on either **Add Widget on the Left** or **Add Widget on the Right** to add a widget.
- Choose a widget to add.
- Enter a **Title** for the widget, if desired.
- Enter a **Sort Order** for the widget. This tells the system which order the widgets should appear on the screen if more than one is added.
- Select which **Roles** the widget will be visible to from the drop down menu. Or click **Add All** to make the widget visible to all users.
- Click **Save**.
- Repeat this process to add additional widgets.

Login Appearance

Within this page, you are able to adjust the login appearance of your account.

- Click **Login Appearance**
- Enter your institution's name as **Account Title**.
- Enter **Instructions Text**, if desired.
- Enter your institution's **E-mail Domain**.
- Choose the **Background** for your homepage. This can include shuffled images, a single image, or a custom image.
- Click **Save**.

Media

Within this page, you are able to adjust the settings for media items. As with appointments and events, you can adjust the settings at either the global level (default) or at the specific location level.

- Click **Media**
- Choose the **Scope** to edit settings for. The default is **Account**, which controls the global settings for all locations. To change the scope, click **Change** and select the **Location** you want to edit settings for. Make sure to click **Set Scope** once the location is selected.
- You are able to adjust the following settings for **Media Check-Out**:
    - **Default Checkout Period:** set the default time period for an item to be checked out. You can choose from hours, days or weeks.
    - **Allow editing Check-out Date:** decide if the check-out date will be able to be edited when an item is assigned.
    - **Allow Overwriting Due Back Time:** decide if the due back date will be able to be edited when an item is assigned.
    - **Allow Entering Staff Member:** decide if the staff member who checked out the item will be recorded.
    - **Allow Entering Event:** decide if an event associated with the item should be recorded.
    - **Allow Entering Notes:** decide if notes can be added to the item check-out
- You are able to adjust the following settings for **Media Check-In**:
    - **Allow Check-in On Saturday:** decide if items can be checked in on Saturdays
    - **Allow Check-in On Sunday:** decide if items can be checked in on Sundays
    - **All Media Must be Checked-In By:** decide if media must be checked in by a specific time each day in order to be returned on time.
    - **All Media Must be Checked-In By:**
    - **Allow editing Check-In Date:** decide if the check-in date will be able to be edited when an item is checked back in.
    - **Allow Entering Notes:** decide if notes can be added to the item check-in
- Click **Save**

Notifications

Within this page, you are able to send notifications and create notification topics to be used for rules.

Send Notification

This will send you to the Send Message page, which is also accessible by navigating to **General** > **Users** > **Send Message**.

Notification Topics

From this page, you are able to create topics for notifications. These are primarily used when creating rules for automatic notifications. These topics will also appear on the user profile and users will be able to decide if they want notifications from that topic delivered via e-mail, push notification or text, or if they want them delivered at all.

- Click **Topics**
- Click **Create Topic**
- Enter a **Name** for the topic. We recommend being specific so that other users will know what the topic addresses.
- Enter a **Description** for the topic. We recommend being specific so that other users will know what the topic addresses.
- Choose the type of **Delivery** that will be enabled. We recommend selected all three to ensure that notifications can be sent to all users.
    - **On-Screen Delivery:** the notification will be sent via a push notification through the app, or appear onscreen through the browser.
    - **Email Delivery:** the notification will be sent via e-mail.
    - **Text Message Delivery:** the notification will be sent via text message.
- Click **Save**.

Ratings

Within this page, you can choose if users will be able to rate or leave reviews/comments about locations and services within AccuCampus. You are also able to moderate comments and reviews from this page by clicking **Moderate Comments**.

- Click **Ratings**
- Choose the **Rating Type**. You may choose between a 5-point star based scale, a thumbs up/thumbs down scale, or a smiley face scale.
- If desired, choose to **Moderate Reviews**
- If desired, choose to **Moderate Comments on Reviews**.
- Click **Save**.

Rules

Within this page, you are able to create rules for actions within AccuCampus. This can include rules assigning tags to users, creating automatic notifications based on user actions, automatically assigning action items and more. There are different types of rules, explained below. You can select one trigger per rule with multiple conditions for that trigger. You are also able to select multiple actions per rule.

SEND NOTIFICATION

This rule type will send an automatic notification based on an action within the system.

- Click **Rules**
- Click **Create New**
- Enter a **Name** for the rule. We recommend that you use a unique and specific name so that the rule can be identified by other users.
- Enter a **Description** for the rule. We recommend that you use a unique and specific name so that the rule can be identified by other users.
- Set a **Trigger** and **Conditions** for the rule.
    - **Trigger:** is the action within the system that causes the rule to go into effect. This could be a user action, or a profile item.
    - **Conditions:** these are these are the specific conditions of the trigger. An example is a trigger of "signs into a multi-step kiosk" and the condition of "service ID is…"
- Set the **Action** that should take place as a result of the trigger.
    - Click **Add Action**
    - Click **Send a Notification**
    - Choose a **Notification Topic**
    - Enter **Fixed Users** and **Other Users** who will receive the notification. Fixed Users are specific people who will always be notified. Other Users are typically identified by a token so that the notification goes to anyone who meets the trigger and conditions.
    - Enter a **Notification title**.
    - Choose **Delivery Methods**
    - Enter the **Content** for the delivery methods chosen.
    - Click **Save**
- If desired add another **Action**. If not, click **Save**.

E-mail Debug Information

This rule type will send debugging information to help pinpoint errors in specific processes.

- Click **Rules**
- Click **Create New**
- Enter a **Name** for the rule. We recommend that you use a unique and specific name so that the rule can be identified by other users.
- Enter a **Description** for the rule. We recommend that you use a unique and specific name so that the rule can be identified by other users.
- Set a **Trigger** and **Conditions** for the rule.
    - **Trigger:** is the action within the system that causes the rule to go into effect. This could be a user action, or a profile item.
    - **Conditions:** these are these are the specific conditions of the trigger. An example is a trigger of "signs into a multi-step kiosk" and the condition of "service ID is…"
- Set the **Action** that should take place as a result of the trigger.
    - Click **Add Action**
    - Click **Email debug information**
    - Enter the e-mail address of the **Recipient**.
    - Click **Save**
- If desired add another **Action**. If not, click **Save**.

Stop Execution

This rule type will stop the execution of an action within AccuCampus and provide an error message explaining why the user is not allowed to complete the action. It is typically used as an on-screen notification to enforce attendance restrictions.

- Click **Rules**
- Click **Create New**
- Enter a **Name** for the rule. We recommend that you use a unique and specific name so that the rule can be identified by other users.
- Enter a **Description** for the rule. We recommend that you use a unique and specific name so that the rule can be identified by other users.
- Set a **Trigger** and **Conditions** for the rule.
    - **Trigger:** is the action within the system that causes the rule to go into effect. This could be a user action, or a profile item.

  - **Conditions:** these are these are the specific conditions of the trigger. An example is a trigger of “signs into a multi-step kiosk” and the condition of “service ID is…”
- Set the **Action** that should take place as a result of the trigger.
  - Click **Add Action**
  - Click **Stop Execution**
  - Enter the **Message to Display**.
  - Click **Save**
- If desired add another **Action**. If not, click **Save**.

Assign Action Items

This rule type automatically assigns an action item based on a user’s actions or profile items within the system. It can also be used with the Complete Action Items rule type to create an Action Pack where action items are automatically assigned as part of a sequence.

- Click **Rules**
- Click **Create New**
- Enter a **Name** for the rule. We recommend that you use a unique and specific name so that the rule can be identified by other users.
- Enter a **Description** for the rule. We recommend that you use a unique and specific name so that the rule can be identified by other users.
- Set a **Trigger** and **Conditions** for the rule.
  - **Trigger:** is the action within the system that causes the rule to go into effect. This could be a user action, or a profile item.
  - **Conditions:** these are these are the specific conditions of the trigger. An example is a trigger of “signs into a multi-step kiosk” and the condition of “service ID is…”
- Set the **Action** that should take place as a result of the trigger.
  - Click **Add Action**
  - Click **Assign Action Item**
  - Enter the **Student** that should receive the action item using the Tokens on the right hand of the screen.
  - Select the **Action Item** that should be assigned.
  - If desired, enter **Notes** that should accompany the assignment of the item. Remember to keep these general so that they’ll apply to all users who might be automatically assigned the item.
  - Click **Save**

- If desired add another **Action**. If not, click **Save**.

Complete Action Items

This rule type sends an automatic notification based on an action within the system. It can also be used with the Assign Action Item rule type to create an Action Pack where action items are automatically assigned based on a sequence.

- Click **Rules**
- Click **Create New**
- Enter a **Name** for the rule. We recommend that you use a unique and specific name so that the rule can be identified by other users.
- Enter a **Description** for the rule. We recommend that you use a unique and specific name so that the rule can be identified by other users.
- Set a **Trigger** and **Conditions** for the rule.
    - **Trigger:** is the action within the system that causes the rule to go into effect. This could be a user action, or a profile item.
    - **Conditions:** these are these are the specific conditions of the trigger. An example is a trigger of “signs into a multi-step kiosk” and the condition of “service ID is…”
- Set the **Action** that should take place as a result of the trigger.
    - Click **Add Action**
    - Click **Set Action Assignments as Completed**
    - Enter the **Student** that should be marked as completed using the Tokens on the right hand side of the screen.
    - Enter the **Action Item** that should complete.
    - If desired, enter a **Service**.
    - If desired, enter a **Course**.
    - If desired, enter **Notes**. Make sure to keep these general so that they can apply to any user with the action item.
    - Click **Save**
- If desired add another **Action**. If not, click **Save**.

Add or Remove Tags

This rule type adds or removes a tag from a user based on an action within the system or a profile item. It can be used with the Add Action Item rule type to automatically add action items based on tags, or automatically remove tags once an action item has been completed.

- Click **Rules**
- Click **Create New**
- Enter a **Name** for the rule. We recommend that you use a unique and specific name so that the rule can be identified by other users.
- Enter a **Description** for the rule. We recommend that you use a unique and specific name so that the rule can be identified by other users.
- Set a **Trigger** and **Conditions** for the rule.
  - **Trigger:** is the action within the system that causes the rule to go into effect. This could be a user action, or a profile item.
  - **Conditions:** these are these are the specific conditions of the trigger. An example is a trigger of "signs into a multi-step kiosk" and the condition of "service ID is…"
- Set the **Action** that should take place as a result of the trigger.
  - Click **Add Action**
  - Click **Adds or Removes a Tag**
  - Choose to **Add a Tag** or **Remove a Tag**
  - Enter the **Entity Type**
  - Enter the **Internal ID** using the tokens on the right hand side.
  - Select the **Tag** to add or remove
  - Click **Save**
- If desired add another **Action**. If not, click **Save**.

PROMPT RATINGS

This rule type sends an automatic notification to a user to prompt them to rate something.

- Click **Rules**
- Click **Create New**
- Enter a **Name** for the rule. We recommend that you use a unique and specific name so that the rule can be identified by other users.
- Enter a **Description** for the rule. We recommend that you use a unique and specific name so that the rule can be identified by other users.
- Set a **Trigger** and **Conditions** for the rule.
  - **Trigger:** is the action within the system that causes the rule to go into effect. This could be a user action, or a profile item.

    - **Conditions:** these are these are the specific conditions of the trigger. An example is a trigger of "signs into a multi-step kiosk" and the condition of "service ID is…"
- Set the **Action** that should take place as a result of the trigger.
    - Click **Add Action**
    - Click **Asks a User to Rate Something**
    - Choose the Sample size to determine how often the rating survey should be sent. This can range from 10% to 100% of users.
    - Enter the **name** of the user, location or service the **Email** should come from.
    - Enter a **Subject** for the e-mail.
    - Enter a **Footer** for the e-mail.
    - Choose what users should rate. This could include **Courses**, **Locations**, **Staff**, **Instructors**, and/or **Services**.
    - Click **Save**
- If desired add another **Action**. If not, click **Save**.

Semesters

Semesters are used to identify when your locations, services and courses are available. You will need to repeat these steps in order to create each new semester.

- Click **Semesters**
- Click **Create New**.
- Fill in the **Name**, **Start Date**, and **End Date**. We recommend following the same naming convention for all semesters. Make sure your naming convention can be easily understood by your users.
- Click **Save**.
- You'll now be asked to enter any **holidays/offtimes** that the **Locations** will be unavailable. A list of suggested days off will appear at the bottom of the screen that you can add by clicking. You can also add any other days as needed.
- Click **Save**.

Single Sign-On

Within this page, you are able to set up single sign-on for AccuCampus. Contact AccuCampus staff for more information on how to set up single sign-on for your institution.

Social Activity

Within this page, you are able to set the ability to score social activity within the Campus Community feature.

- Click **Social Activity**
- Click Score Social Activity
- Set **point levels** for the following activities:
    - **Post a File**
    - **Post a Video**
    - **Post a Picture**
    - **Post a Message**
    - **Comment on Post**
- Choose if users will be able to view the following **network contacts** within the community
    - **Classmates and Class Professors:** designed to help students connect within their registered courses.
    - **Recently Seen Tutors/Students:** designed to help students connect with other users
- Click **Save**

Tags

Within this page, you are able to create, update or delete tags which can be placed on users. Tags are typically used to identify specific sub-groups of users. Tags can be added manually to a user, or they can be imported to apply to multiple users.

- Click **Tags**
- Choose a **type** of Tag
    - **User Tags:** used to identify users as a way of assigning action items, adding them to groups, or to group them based on a profile item.
    - **Attendance Log Tags:** used to identify users based on actions within the system.
- Click **Create Tag**
- Enter the name of the **Tag**. We recommend that you use a unique and specific name so that the tag can be identified by other users.
- Enter a **Description** of the tag. We recommend that you use a unique and specific description so that the tag can be identified by other users.

- If desired, enter who the tag was **Requested By**. This could be a user or an entity on campus.
- Identify **Roles with View Access**. These roles will be able to view, but not edit the tag.
- Identify **Roles with Edit Access**. These roles will be able to edit the tag.
- If desired, add a **Scope** for the tag. This will restrict view/edit ability to only users with the selected scope.
- Click **Save**.

Translations

Within this page, you are able to enter translations of common terms within the AccuCampus system. This change will be for your entire domain.

User Profiles

Within this page, you can build User Profile questionnaires. The number of questions per questionnaire and the number of questionnaires is unlimited. Within each questionnaire, you are able to restrict view and edit access for the questionnaire as a whole. This allows you to restrict more sensitive information to only those users who should be able to see it.

- Click **User Profiles**
- Click **Create New**
- Enter a **Name** for the questionnaire. We recommend that you use a unique and specific name so that the questionnaire can be identified by other users.
- Choose the **Role(s)** that the questionnaire will apply to.
- Choose if a user can **View their Own Profile**. This means that this specific questionnaire will be visible to the user on their own user profile and they will be able to see the information contained within.
- Choose if a user can **Edit their Own Profile**. This means that the user will be able to edit the information contained within the questionnaire on their own user profile.
- Identify **Roles with View Access**. These roles will be able to view the questionnaire, but not edit it on another user's profile.
- Identify **Roles with Edit Access**. These roles will be able to edit the questionnaire information on another user's profile.
- If desired, add a **Scope** for the questionnaire. This will restrict view/edit ability to only users with the selected scope.
- Use the **Form Designer** to create the questionnaire. You are able to add unlimited fields on the form.

- **Section Header:** create subheadings for the questionnaire.
- **Text:** creates a question/statement that will be answered via free-format text. The answer can be set to be required, if desired.
- **Multiple Choice:** creates a question/statement that will be answered via a multiple choice format. The answer can be set to be required, if desired.
- **Check Box:** creates a question/statement that will be answered via check boxes. The answer can be set to be required, if desired.
- ***NOTE:*** *Each question/statement and answer of the questionnaire will need a* ***unique key****. This is used to import the answers to the questions/statements and also in reporting. Make sure to choose something that is easily remembered and also easily identifiable.*

- Click **Save**.

User Roles

Within this page, you are able to create and edit user roles. You can also view role mappings and conduct a permission assessment.

CREATE ROLE

- Click **Create Role**
- Enter a **Title** for the role. We recommend that you use a unique and specific name so that the role can be identified by other users.
- Enter a **Description** for the role. We recommend that you use a unique and specific name so that the role can be identified by other users.
- Choose which roles this role will have access to.
  - **Access to View Roles**: these are roles that this role will be able to view within the system. Access to View Roles grants the role the ability to view the users with that role.
  - **Access to Edit Roles**: these are roles that this role will be able to edit within the system.
- **Features Policy**: the features contained in this section are packs of permissions and is meant as an easy way for administrators to assign groups of permissions to a role. Users should be mindful of all of the permissions associated with each pack. We recommend using this feature as a starting point and then refine further using the Actions Policy.
- **Actions Policy**: this feature allows administrators to assign individual permissions to a role. It is meant as a way to refine the Features Policy.

- Click **Save**.

Role Mappings
This feature allows you to see which roles are associated with specific features within the system. It does not change permissions for the users, but allows an administrator to associate different features with the different kinds of users.

Permission Assessment
This feature allows you to view current permissions based on user, role, permission or scope.

- Click **Permission Assessment**
- **User:**
  - Click **User**
  - Search for and select the **User**
  - Click **Show Permissions**
- **Role:**
  - Click **Role**
  - Search for and select the **Role**
  - Click **Show Permissions**
- **Permission:**
  - Click **Permission**
  - Search for and select the specific **Permission**
  - Click **Show Roles**
- **Scope:**
  - Click **Scope**
  - Search for and select the specific **Scope**. Leave blank to view unscoped users.
  - Search for and select the specific **Role**.
  - Click **Show Users**.

View Audits
This feature allows you to view an audit of a specific user's actions within AccuCampus. This is typically used when conducting a security audit.

- Click **View Audits**
- Search for and select the **User**

- Enter a **Time Range** to be audited
- To further refine the search, you can:
    - Select a **Resource**
    - Select an **Action**
    - Select a **Type** of location, resource or user
    - Search for and select an **Entity**
- Click **Search**