Attendance tracking made easy

Accudemia

Web-Based Center Management Software

Engineerica®

Accudemia Reference Manual

Table of Contents

Introduction

Academic Center Administration System

We are sure you and your visitors will enjoy and benefits of the many features in Accudemia. This system is built on the feedback of administrators and staff members in academic centers such as yours. Accudemia is a comprehensive learning center system with these capabilities:

- Tracking and reporting on students' attendance.
- Reporting on the usage and utilization of your services.
- Tracking tutor calendars.
- Collecting feedback on services and staff via periodic visitors surveys.
- Reporting on visitors' demographics and profile information.
- System Assessments.
- Recording interactions with students.
- Keeping a log of all sessions.
- Managing service requests and assignments.
- And more!

All in one convenient package! With your help and support, we will continue to improve and expand Accudemia. Please submit your suggestions via the online suggestion box:

http://www.engineerica.com/accudemia/support
Or
http://accudemia.uservoice.com

We hope you will enjoy using the system as much as we enjoyed developing it.

Disclaimer

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How to use this Accudemia Reference Manual

If there is helpful additional information that we want you to know we will make a **Note** like this:

Note: *If you click on "User Accounts" you will see all the users regardless of their role. You can use the "Show Filters" tab on the top to filter down the list or to show only one role type. You can also filter down the list from the main menu by selecting "User Account" and the type of persons you*

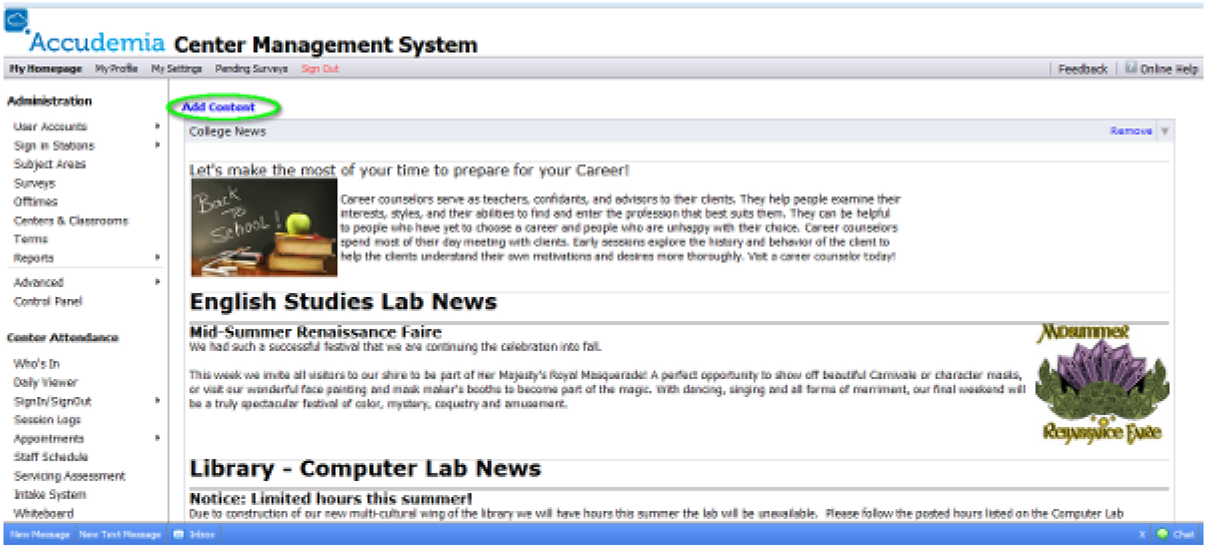
If there is important information that we want you to know we will make a **Warning** like this:

Important! *It is very important to designate the correct role as the access rights to the system are very different depending on the user type you select.*

If there is concept that we want you to understand we will make an **Example** like this:

Example: ***$E=mc^2$*** *This equation simply means that mass and energy are fundamentally the same.*

My Home Page



This is the Main screen all users see when they log into Accudemia with a password. It is featuring all your **College News** from every one of your centers. Optionally it can display any **pending surveys**, **upcoming appointments**, and a box full of other gadgets you can add to customize your Accudemia user's experience.

You can click the **Add Gadgets** at the top of this screen to see some other gadgets such as **News Headlines**, **Google Shared Calendar**, **Messaging tools**, and more. Be sure to check it out!

Editing your College News

This step is used to inform the users about news in the college and center places. An example of relevant College/Center announcements could be showing the opening times. To create your College News, do the following:

1. Go to **Administration**, select **Control Panel**, and click **Announcements**.
2. Select where **View those applied to** at **Settings Scope** pop up window.
3. Write your News at the Text Box.
4. Click the **Save Changes** button.

User Management

Manage Predefined Users

Purpose: To add and modify students, tutors, instructors, staff, system users and groups
Way to Access: **Administration** > **User Accounts**

When you first enter this screen you will see a grid with six columns. The first column shows the persons last name, first name, and middle name. The second column shows the ID-Number, the third the gender followed by the birth date. The fifth column shows the user's status. A green dot in the Active column indicates the user is active, while a red dot indicates an inactive user. The last column shows the users roles (student, tutor, instructor, system user).

Note: *If you click on "User Accounts" you will see all the users regardless of their role. You can use the "Show Filters" tab on the top to filter down the list or to show only one role type. You can also filter down the list from the main menu by selecting "User Account" and the type of persons you want to*

Adding an User

General Information:
To add a new user, click on the "Create New" button. Simply enter the ID number and the password (not needed for students performing a sign in to a center). Fill in the "User Information" tab containing names, comments, gender, birth date and specify the status, if the user is active or not. Also users can upload their photos to their profiles.

If the user ID you are saving is already in the database, you will see a warning icon, and you will not be allowed to save the duplicate ID.

Important! It is very important to designate the correct role as the access rights to the system are very different depending on the user type you select.

Then you must select the user's role (or roles) from the options: Tutor, Student, Instructor and System User.

Depending on the user role selected, you will see new tabs appear:

Student

- **Student Enrollment**:
  Here you can assign classes to a student on a per semester basis. This is student registration (enrollment).

Tutor

- **Tutor Courses**:
  Here you can assign subjects to a tutor on a per semester basis. This is tutor registration.

Instructor

- **Instructor Courses**:
  Here you can assign classes to an instructor on a per semester basis. These are the classes lectured by an instructor (instructor registration).

Manage System Users

Accudemia allows you specify the rights of the System User by selecting a "Predefined Role" and "Scope." Accudemia has a new feature that allows you to create your own System Users Roles: Role Group Template.

Predefined Roles

College Administrator: Can manage all settings, users and centers in the college.
Center Administrator: Can manage the settings of one center.
Student Administrator: The user is allowed to create, edit and remove students.
Tutor Administrator: The user is allowed to create, edit and remove tutors.
Instructor Administrator: The user is allowed to create, edit and remove instructors.

User Roles

The follow table shows the different user's roles. Accudemia lets to College Administrator create and mixing this different user's roles.

User Role	Description	Applies to
Classes Editor	The user is allowed to create, edit and remove classes	Classrooms and place holders
Student Sign Ins/Outs Editor	Can make manual student sign in and sign outs (mass sign ins)	Centers and place holders
Off-times Editor	Can edit place off-times	Centers, classrooms and place holders
Attendance Reports Viewer	Can only see reports which are related to attendance tracking	College
Visits Reports Viewer	Can see all Reports related to visits (e.g. New Visitors, Visits History)	Centers and place holders
Data Importer	Can import data college wide	College
Surveys Creator	The user is allowed to create, edit and remove surveys.	Centers, classrooms and place holders
Referrals Issuer	Can create, edit, close, re-open, change the follower, and add comments to a referral in the warning system	College
Tutors Manager	The user is allowed to create, edit and remove only tutors.	College
Appointment Viewer	Can only view appointments	Centers and place holders
Roll Call Administrator	Can manage the Roll Call in his administration scope (issue them and view the information related to each device)	Centers, classrooms and place holders
Appointment Reports Viewer	Can only see reports which are related to Appointments (e.g. Appointment Schedule)	Centers and place holders
Semester Creator	Can create/edit semesters	College

Class Attendance Administrator	Can manage the presences and absences of the students.	Classrooms and place holders
Referrals Administrator	Can create/edit all options in the warning system (referrals)	College
Tutor Schedules Editor	Can edit Tutor Schedules	Centers and place holders
Class Attendance Reports Viewer	Can only see reports which are related to class attendance reports.	Classrooms and place holders
Settings Editor	Can edit the Settings	Centers, classrooms and place holders
Sign In Stations Creator	Can create Sign In Stations for places	Centers, classrooms and place holders
System Administrators Manager	The user is allowed to create, edit and remove other system users. But can only manage persons with the same or lower user rights.	Centers, classrooms and place holders
Tutor Sign Ins/Outs Maker	Can make manual tutor sign ins and sign outs (mass sign ins)	Centers and place holders
Appointments Administrator	Can create and view appointments for all users.	Centers and place holders
Student Lists Reports Viewer	Can only see general reports that contains user lists.	College
Terminology Editor	Can edit the application terminology.	College
Person Groups Manager	Can create/edit Groups	Centers, classrooms and place holders
Statistical Reports Viewer	Can only see general summarized reports	Centers, classrooms and place holders
"Daily Viewer" section Viewer	Can view the Daily Viewer for center attendance	Centers and place holders

Session Logs Editor	Can edit Session Logs	Centers and place holders
Subjects Editor	The user is allowed to create, edit and remove subjects for the whole college.	College
Account Administrator	The user is allowed to perform college wide operations (buy AccuCredits, use the developers API, and so on)	Anywhere
Courses and Services Subscriber	Can register courses and services to a place	Centers and place holders
Registration Reports Viewer	Can see all reports related to Registration (e.g. Student Registrations, Course Registrations)	College
Instructors Manager	The user is allowed to create, edit and remove only instructors.	College
Students Manager	The user is allowed to create, edit and remove only students.	College
Profile Questionnaire Editor	Can edit the profile questionnaire.	College
"Who Is In" Viewer	Can see currently signed in Students/Tutors	Centers and place holders
SMS Sender	The user is allowed to send SMS	Anywhere
Place Administrator	Can manage all places in the user's scope (which could be a center, a classroom or the whole college).	Centers, classrooms and place holders

Role Group Template

This feature allows to Colleges Administrators set new roles to predefined system users.

Steps to create a Customized Role Template
Way to access: **Administration** > **Advanced** > **Role Group Template**
Click over “Create New”. Type a name for this new Customized Role. Select the new roles. Then Save the changes and your Customized role is already created.

Add this new role to a User:

Tool bar option

Way to access: **Administration** > **User Accounts** > **Manage Roles**

Select the role in the Role Group Template dropdown list, then select the scope, and click the Accept link. For Security issues Accudemia displays a warning pop up; click the "Yes" and your new role will be set on the System User.

Editing User role

Way to access: **Administration** > **User Accounts**

When editing a User, click the checkbox for "System User" to make them one. It will then display Role Group Tab. Select the role and be sure to save the changes.

Edit Users

Find the person you wish from the list in the grid. Use the Search button, or the grid filtering feature to find the required person. To edit the record, click on the "Edit" button or double click on the record. Make your changes and then click on the "Save Changes" button to keep them, or click on the Cancel button to keep the data without saving your changes.

Making a Person Inactive - To inactivate a student, edit the person as described above, unchecked Active check box, and save the record. When the person is inactive, a red dot will appear in the active column of the list box. Inactive students are not allowed to sign in.

Deleting a Person To delete a person, first highlight the name, and then click on the Delete button. You will see a confirmation message: If you answer "Yes", Accudemia will check the database to see if there are related records in other tables. If no related records exist, Accudemia will delete the student.

If you answer "Yes", Accudemia will delete the person's record and all related records, such as sign-in records and messages.

Profile: In this tab you have the person's profile questionnaire (if so required by the college settings). The questions can be edited in the Profile Questionnaire.

Technical Contacts

Way to **Access** > **Administration** > **Advance** > **Technical Contacts**

Purpose: Create Contacts users to get supported by the Accudemia Support Team. Due to your type of license Accudemia allows to have some users to get supported. License types:

- **Small Center:** Due to your license restrictions you can specify up to **1 technical contact**.
- **Single Center:** Due to your license restrictions you can specify up to **2 technical contact(s)**.
- **College-Wide A 5000:** Due to your license restrictions you can specify up to **2 technical contact(s)**.
- **College Wide B 8000:** Due to your license restrictions you can specify up to **3 technical contact(s)**.
- **College Wide C 15000:** Due to your license restrictions you can specify up to **4 technical contact(s)**.
- **College Wide D 25000:** Due to your license restrictions you can specify up to **5 technical contact(s)**.
- **College Wide E 50000:** Due to your license restrictions you can specify up to **6 technical contact(s)**.

To remove or change your technical users you must remove from your admin account. After that Accudemia Team will remove them.

Control Panel

Purpose: Define configuration options for the entire college and for each location (centers and classrooms).
Way to Access: **Administration** > **Control Panel**

Use this module to configure global options that affect the behavior of the system for the college or center.

Some College settings are inherited by the centers and can be modified at the center level for each center. So, for those settings, the college settings serve as defaults only. Once a center modifies its settings, the college settings will have no effect on them.

Select your Center or Classroom to modify its settings:

Click on the area you wish to modify. If you have access to more than one location you may be prompted to select the location to edit.

For more info on each setting, take a look to the following sections:

- Tracking Settings
- Web Site Settings

Tracking Settings

General

Calendar

Purpose: To edit the calendar defaults in Off-times and Tutor schedule

- **Period to Show:** Defines to display one or two weeks in the calendars.
- **First Day to Show**: Defines which day to be shown first in the calendars.
- **Blocks Per Hour:** Defines the amount of divisions inside the hour.
- **Start time:** Defines the time from which the calendar will be shown to the user. The start time should never be later than the opening time.
- **End time:** Defines the time till which the calendar will be shown to the user. The end time should never be earlier than the closing time.

Miscellaneous

- **Associate tutors with all subject Areas:** It associates tutors to all subjects by default.
- **Maximum sign-in duration:** Sets the maximum time that a user is signed in.
- **When is longer than…X:** It shows a customized message if the sign in duration is longer than X minutes.
- **Default sign-in duration:** X minutes.

Sign-In Options

- **When a nonexistent student signs-in:** Allows saving or discarding a session log, when the user is not in the college database.
- **Allow Multiple Services check box:** It allows to students select multiple services at sign in station.

Stations' Options

To define the options shown in the Center sign in screen

- Allow who is in: Check this box if you want to display the “Who’s In” button and have the Who’s In screen
- Allow new students: Check this box if you want students who are not already in the Accudemia database to be able to first register, and then sign in. If this option is not checked, you can modify the default error message shown when a non-existing student tries to sign in on the Screen Captions tab.

- Allow homepage access: Check this box if you want students to have access from the sign-in screen to their homepage. You may want to disable this to avoid your center's sign in screen from being overused by student

iAccu MDST

Multi-Device Session Tracking Settings

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

Walk-Ins

Purposes: Customize your activity tracking screen.

Tutor

- **Selection**
    1. **Required**: If you choose this option, the student has to select a tutor to be able to sign in.
    2. **Optional**: The option (none) will appear in the tutors list. Choose this selection if your center offers self-study for example.
    3. **Do not show**: The Tutors list won't show during the sign in process.

> ***Note:*** *You have the option to show the available tutor a certain amount of minutes ahead of the current time. This allows for example a student who is signing in early for an appointment to select the tutor.*

- **Availability**
    1. **Use Schedule Information**: Only the tutors that are scheduled to work for the selected subject and services will appear.
    2. **Use Registration Information**: Only Tutors assigned (scheduled) for the chosen subject will be shown.
    3. **Show Everyone**: Show every active tutor for the college.

- **Display at**
    1. **Sign In**: Prompts for tutor selection during sign in.
    2. **Sign Out**: Prompts for tutor selection during sign out.

3. **Sign In (Allow selection at sign out)**: Prompts for tutor selection during sign in, but allows students to select an unknown tutor and then prompts them again during sign out. The unknown option will appear during sign in.

Instructors

- **Selection**
    1. **Required**: If you choose this option, the student has to select an Instructor to be able to sign in.
    2. **Optional**: The option (none) will appear in the instructor list. Choose this selection if your center offers self-study for example.
    3. **Do not show**: The Instructors list won't show during the sign in process.

- **Use Registration Info Check Box:** Check this button if you want to show only the registered instructors for the selected subject.

> ***Note:*** *If there is only one assigned instructor to a class and you are choosing the "do not show" option and check the "use registration info" box, this instructor will be automatically recorded at sign-in.*

Subject

- **Selection**
    1. **Required**: If you choose this option, the student has to select a subject to be able to sign in.
    2. **Optional**: The option (none) will figure in the subject list. Choose this selection if your center offers self-study for example.
    3. **Do not show**: If you don't need to track the subjects at your students, choose the "Do not show" option. This is useful if you only want to track student's sign-in and sign-out time without tracking the reason for their visit
- **Default**: Choose which subject to show as default.
- **Use Student Enrollment check box:** Check this button if you want to show only the subjects the student is assigned to. This will make the sign in a lot easier for the student.

Services

- **Selection**
    1. **Required**: If you choose this option, the student has to select a Service to be able to sign in.
    2. **Optional**: There will figure the option (none) in the Services list.
    3. **Do not show**: The Services list won't show during the sign in process.
- **Default**: Choose which Service to show as default.

- **Allow multiple services check box**: Check this button if you want to show more than service to be selected. This is useful if students come to your center for multiple activities and you want to track them separately.

Guest sign-ins

- **Allow guests to sign-in**: Enabling this will allow guest users to walk-in.
- **Guest user ID**: This is the ID that will be assigned to the Guest User. When a guest signs-in for the first time a person will be created. The name of the person will be “Guest User”. You'll be able to filter reports by this person. Manual sign-in is also possible using this person.
- **Sign-in time for guests**: Here you should specify the period (in minutes) that the guest is in the center. Note that guests don't need to sign-out.

Misc.

- **Require confirmation before signing in check box**: If checking the option, the student will see a message before being able to sign in definitely.

Appointment

Appointments Restrictions

- **Prevent persons from scheduling appointments**
    - Prevent students from scheduling appointments
    - Prevent students from cancelling, restoring and re-scheduling appointments
- **Allow Creating Appointment:** Set time restrictions for new appointments.
    - No less than X days, X hours and X minutes ahead.
    - No more than X days ahead.
    - In future terms: Allow students to set appointments the next term, if the tutor has set his schedule on it.
    - If the student does not have one with the selected tutor in the selected day: Use this to prevent a student from creating multiple appointments in a single day.
    - Start every X minutes from date start to date end: Establishes a range to set appointments in a fixed time.
- **Maximum hours per week**: Set the maximum time per week that students or tutors can set an appointment.
- **No-Show Restriction**: Prevent creation with a student with more than (number) not voided no-shows in X days.
- **Back to Back Restriction**: Prevent creation of back-to-back appointments with the same or an unspecified subject Area until X minutes have passed.
- **Duration Restrictions**: Set maximum and minimum appointment length. Also, you can set appointment default length.

- **Count visit towards appointment if sign in is**: Set the time range limit to accept an appointment as "show". You can set the minimum time that users must stay in the appointment, using "And stays signed in for at least 'x' minutes" check box. This option forces users to sign out.
- **Group appointments**: Tutor can assist with different subject Areas.
- **Allow only the following days**: Restrict the date of the appointments.

New Appointments

- **Students must confirm their information once every X days:** The student will be allowed to set the appointment after confirm his user information.
- **Subject Areas**
    - **Selection**:
        - **Optional**: Allow students to select a subject area, but does not force them to do so.
        - **Required**: Force students to select a subject area when creating new appointments.
        - **Do not Show**: Students will not be asked to select a subject area.
    - **Default**: Choose which subject area will be selected by default.
    - **Use Student subject Area Enrollment**: Check to show only subjects where the student is enrolled.
- **Services**:
    - **Selection**
        - **Optional**: Allow students to select a service, but does not force them to do so.
        - **Required**: Force students to select a service when creating new appointments.
        - **Do not Show**: Students will not be asked to select a service.
    - **Default**: Choose which service will be selected by default.

Email Notifications

This section enables users to receive confirmations and reminders via emails. This behavior can be changed by accessing your *My Settings* link at the top.

- **Send reminder "X" hours before the appointments start**: Choose to receive reminder via email before an appointment begins. The time set is used by default.
- **Send confirmation by email**: Choose whether to send a confirmation email when someone creates a new appointment.

> ***Note:*** *This settings use your primary email address.*

SMS Notifications

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

- **Send reminder "X" hours before the appointments start**: Choose to receive a mobile text message notification before an appointment begins. The time set is used by default.
- **Send confirmation by SMS**: Choose whether to send a confirmation message when someone creates a new appointment.

Class Attendance

This section allows you to set values to your classes by default.

- Tolerances.
- Unresolved Sign-Ins: Customize actions when there is an unresolved log.
  - When a student not registered signs in to a class.
  - When encountering a sign-in when there is no class.
  - When encountering duplicated sign-ins in the same class session.
  - When encountering multiple classes at the same time.
- Schedule Customization: Days that your wizard must show.

Website Settings

Announcements

Edit the information displayed in My Homepage under College News or Center News.

Use the announcement box in this screen to change the announcements panel that appears in the My Homepage Screen. Use this box to display information such as hours of operation, holiday notices, extended hours during finals week, or anything else you want you want to announce to all users of the system.

Important! Even though Center Settings contains announcements, they don't overwrite the college announcements. All announcements are shown in the home page announcements.

Appearance and Themes

Use this module to configure the presentation of items shown to all users for your Accudemia site.

College Level Options

Site Theme

You have the option to choose from various themes to define the color appearance of the site. Choose a combination of colors that goes well with your logo or the colors of your college.

Header

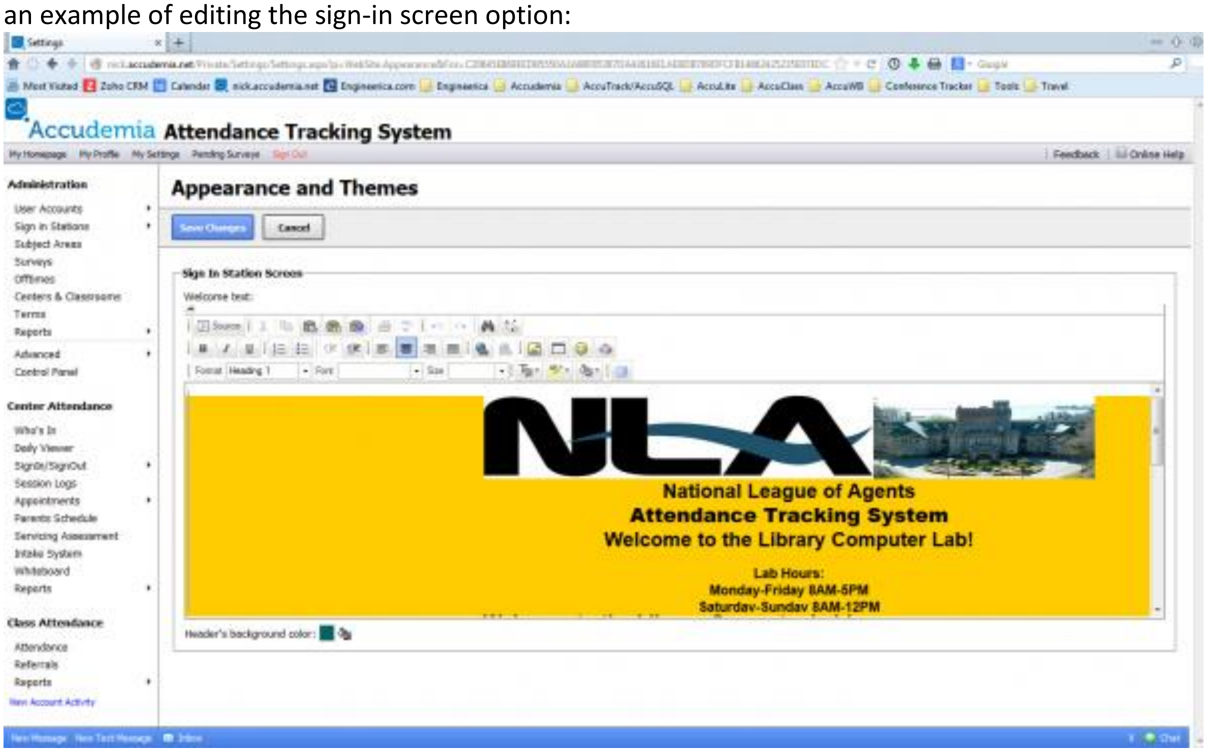
Use the text box at the top of this page to modify the header content message that appears at the top of the Accudemia screen. This is HTML content.

Footer

Use this to define a footer which will be shown on all of your site pages. This is HTML content.

Center Level Options

Here you can design how you want the sign-in stations to look and the information displayed. Below is an example of editing the sign-in screen option:



User Accounts

This section lets you customize security, user profiles, access rights and others account related stuff.

To set up Users ID

In order to set up the ID mask, you can use the following characters:
Mask formatting characters:

- 9 = only numeric
- L = only letter
- $ = only letter and spaces
- C = only custom (note)
- A = only letter and custom (note)
- N = only numeric and custom (note)
- ? = any digit

Note: *Custom characters are: dash (-), period (.), comma (,), slash (/) and backslash (\)*

- *If you want include a mask character 'as is', you can do it by preceding it with a backslash. ie. \? will display ?*
- *To repeat a mask character multiple times, put the number of repetitions between curly braces. For example, ?{15} will behave exactly the same as ???????????????*

ID Samples

Mask	**Description**	**Accepts**	**Not Accepts**
999-99-9999	Social Security Number	123-45-6789	ralflauren@college.edu
LLL-LL-LLLL	Alphabetic Characters Only	abc-de-fghi	123-45-6789
$99$99$99	Letters and Spaces Only	b12 33b88	ralflauren@college.edu
CCCCC	Custom Characters Only	/-/'	12-8
AAAAA	Letters and Csutom Characters Only	ad'/c	12345
NNNNN	Digits and Custom Characters Only	12'/4	abcdf
?????????	Any Character	12/3ab--c	1234567890

Also you can customize:

- Communication
- Access Restrictions
- Extended Profile

Terminology

Use this module to customize the terminology you want the Accudemia System to use.
Type the new term you would like the Accudemia System to use in the "Current Term" boxes and the default term will be changed throughout the system.

Email Templates

Accudemia allows to cutomize the follow emails:

- Appointment Canceled to Students: Message sent to the student when an appointment is canceled.
- Appointment Canceled to Tutors: Message sent to the tutor when an appointment is canceled.
- Appointment Confirmation to Students: Message sent to the student when an appointment is confirmed.
- Appointment Confirmation to Tutors: Message sent to the tutor when an appointment is confirmed.
- Appointment Rescheduled to Students: Message sent to the student when an appointment is rescheduled.
- Appointment Rescheduled to Tutors:Message sent to the tutor when an appointment is rescheduled.
- Appointment Restored to Students: Message sent to the student when an appointment is restored.
- Appointment Restored to Tutors: Message sent to the tutor when an appointment is restored.
- Message Recived: Message sent when an user receives a message send using Accudemia messaging.
- Request Password Change: Message sent when an user requests a password change, using the forgot password feature.
- Share Report: Message sent when an user shares a report to someone else.
- User Created (including password) : Message sent when a new user is created and the password is sent in the email.
- User Created (w/o password) : Message sent when a new user is created and the password is not sent in the email.

Localization Options

Use this module to edit the Time Zone and External Login URL.

Time Zone: Select your college’s time zone from the list.

External Login Url: Enter the external login Url. When left blank, custom page created by Accudemia will be displayed when you go to [yourcollege].accudemia.net. You may, however, wish to integrate a login screen on your own web page. To do so, enter the address of the external webpage here. The page [yourcollege].accudemia.net will redirect the user to your external URL. And when signing out, the user will automatically go back to your external URL.

If you are satisfied with using the default sign in page created by Accudemia, leave this blank. The support staff can also further customize this page for you.

> ***Note:*** *If you want users to use your own portal, please check the documentation in our developers site.*

Profile Questionnaire

Purpose: To define the student's profile questions used for tracking demographics
Way to Access: **Control Panel** > **Profile Questionnaire**

When a new student tries to sign into a center, the system will display the “New Student” screen and collect contact information and demographics data. Accudemia gives you the flexibility to define as many demographic questions as you like in this screen.
Editing the Profile Questionnaire

- Enter the title, for example “Profile Questionnaire”
- Enter the description, for example “Personal Information”.
- Enter a question.
- Change the appearance of the question with the Tool bar.
- Check the “required” box if an answer is required.
- Choose the answer type. Select between Multiple Choice or Text.
- Enter the answer options (in the case of multiple choice answers).
- Enter the next question or click on “Save Changes”.
- Use the Preview option to verify the profile questionnaire

Whiteboard

Purpose: To define the settings to connect to AccuWB whiteboard.
Way to Access: **Control Panel** > **Whiteboard**

Use this area to enter the domain, email address, and password given to your institution to access the AccuWB whiteboard add-on.

Sign In Station

Computers

Purpose: To define Location Sign in Station and set for a classroom or a center.
Way to Access: **Administrations** > **Sign In Stations** > **Computers**

When a machine is set as a sign in station, the [yourcollege].accudemia.net site redirects the user to a center sign in station screen and students and tutors can sign in to the center. Sign-ins can only be performed from a Sign-In Station, except for manual session log editing by system administration.

To create a new sign in station, follow these steps:

1. Click on the “Make me a Sign-In Station” button.

2. Enter the Name of the new Sign-In Station.
3. (Optional) Enter a description of the Sign-In Station.
4. Choose the Location for which you want to create the Sign-In Station.
5. Click on "Save Changes"

If a station was already created for the machine you are using, you will see the following button text: **Remove this sign in station (e.g. demo station)**

To remove a Sign-in Station from the current computer, click on the "Remove this sign in station (e.g. demo station)" button.

To delete a Sign In Station (any sign in station from the college or center), select a station from the grid and click on the **Delete** button. This action can be performed from any machine and it must be used with extreme care, as the page that will normally appear on the sign in station terminal will no longer, and instead the external URL (or default page) will appear.

Center Sign-In Station

Sign In Station Screen

Users are signed-in to for example a center thru the centers sign-in screen. Every center place has their own center sign in screen, and every center has their own custom settings. The Center Sign-in screen has a welcome message on the top. The text displayed just like many other messages can be changed thru the Center Settings. The current date and time appear under the ID Entry box.
The user will see an ID Entry box with the student sign-in screen shown as a default.

Note: *Your local time is shown using your college time zone. If the time is incorrect, you must correct this in your college settings screens. The sign-in ID is set by default to the social security number format (999-99-9999). However, you can change the ID format to whatever you like via the College Settings screen.*

Signs in are registered thru the Sign-In Stations screen. Student Sign-In is the default. To sign in, the student simply enters his ID number in the ID Entry box and presses the "Enter" key or clicks on the forward arrow. When entering an ID in the box, one of the following will happen:

- If entering an ID for a person with multiple roles, additional links will appear to choose the role and continue.
- If entering a new ID number that is not in the database:
    1. If new students are allowed, the user will see the New Student screen.
    2. If new students are not allowed, an error message will appear to the student.
- If entering a student ID for a student that is in the database:

    1. If the student is not signed in, the Activity Tracking Screen will appear.
    2. If the student is currently signed in, the user will be signed out and you will see a sign-out confirmation message.
- If entering any other type of ID, a password box will appear and must be entered to continue. Tutors will be signed in; all others will be directed to the home page.

Activity Tracking Screen

Purpose: To allow the student to select the subject he/she will be using.
Way to Access: This screen appears to student during sign in.

This screen is displayed to students upon sign-in. The Activity Tracking Screen may contain up to four panels with the following questions:

- Subjects: Select one course by clicking on it. The option "none" appears if course entry is defined as optional in the center settings screen.
- Services: Service selection may be optional or required. If optional you don't have to select
- Instructor: Select the instructor by clicking on it.
- Tutor: Select the tutor by clicking on his/her name.

You need this selection if you want to track which tutor the student met during the visit.

Important! *These next panels may differ depending on your College Settings.*

After selecting the above, the student has to click on the "Sign In" button to continue. Depending on the configuration in Center Settings the following reconfirmation message will be shown before signing the student in definitely.

Sign In Confirmation Message

The user will see a confirmation message showing name, sign in date, and sign in time.

Sign-Out Confirmation Message

The sign-out confirmation message appears when students sign out. The message shows the student's name, sign-out date and time and sign-in period for current session.

Sign In Screen Buttons

Any of the following icons except for the sign in options can be hidden for a center place thru the Station's Options (way to access: **Tracking Settings** > **General** > **Station's Options**).
Here is an explanation of their functionality:
Sign In: Click to sign in as a student. This option is shown as default.
My Home Page: Brings up the Homepage from where students can access College and Center

news. The Homepage can also be easily accessed thru the Internet.
Show Students In: Brings up a list of students who are currently signed in.
Show Tutors In: Brings up a list of tutors who are currently signed in.
New Student: This screen allows new students to register themselves in Accudemia.
Forgot Your Password: This screen allows the Users to reset or recover their password via an e-mail link sent to a registered e-mail address on the User's Accudemia account.

New Student Screen

Purpose: To register and collect information about new students.
Way to Access: This screen appears to a student during sign-in if their ID is not already in the database.
This screen collects information about the new student, recently created. After typing the student information on the first tab, the new student is able to see the profile questions and complete it.

> ***Note:*** *The profile questions are customizable for your college at the Profile Questionnaire Screen. The configuration will determine whether an answer is required. Questions that require answers are marked with an asterisk on the right side.*
> *After filling all the new information, this new student must click the **Save Changes** button to be registered to the Accudemia System.*

Who's In? Screen

Purpose: To check who is signed in.
Ways to Access: Main Sign-in Screen Toolbar / **Center Attendance** > **Who’s In**

There are two versions of the Who's In Screen. One is available to all Users from the Sign-In Screen (if settings allow so.) which lists only tutors or only students signed into the system.

The other one can be seen by Administrators after signing in to the system. Subject/s and service/s, which students sign into, can be filtered by staff. Accessing to the **Who is In** Screen as a college administrator thru the menu, User will be able to see all students and tutors signed in to all centers. A filter search button will appear on the tool bar to select viewing criteria. For each user, the date and time of the sign in, course, service, tutor and instructor are shown.

Classroom Sign Station

Sign In Station Screen

Users are signed-in thru the classroom sign-in screen. Every Classroom Place has their own Classroom sign in screen, and every classroom has their own custom settings. The text displayed just like many other messages can be changed thru the Settings. The current date and time appears under the ID Entry box.
The user will see an ID Entry box with the student sign-in screen shown as a default.

Note: *The Classroom Sign in Station displays Current Classes and Next Classes at top of ID Entry box.*

Fixed Walk-Ins

Way to Access: **Administration** > **Sign In Station** > **Computers** > **Fixed Walk-Ins** Purpose: To set up fixed Walk-Ins.

Steps to Set a fixed Walk in

1. Go to : **Sign In Stations** > **Computers**
2. Click the *Make me a Sign in station* button.
3. Select your sign in station: Click the Fixed Walk-Ins
4. Create new:
    - Buttons: Edit & Clear
        1. Edit: Allows to select the tracking options displayed to students to make a walk in into a center.
        2. Clear: Resets the option and clears the option selected.

- The options:
    1. Subject Area
    2. Service
    3. Tutor
    4. Instructor

After Create a new one: you are able to Select, Set, Clear or Delete the recently fixed Walk In. To set your fixed Walk-In must select it, and click over *Set*. Also, you are able to create several of them, and clear the latest one.

Note: *Deleting the browser's cookies will disable the computer as a sign station and also the fixed walk-in will be useless.*

Notifications

This page allows the you to set when Accudemia should send users e-mails and SMS. All Items are selected by default.

Send me an email...

Enables users to receive confirmations and reminders via emails.
“When AccuCredits are less than check” box It's available to administrator users only.

Send me an sms...

Enables users to receive SMS notifications.

Terms/Semesters

Purpose: To define term/semester for your college.
Way to Access: Administration> Terms.

> ***Important!*** *This is among the first things a college administrator must do in the system to make the system functional.*

Adding a New Term/Semester

Click on the **Create New** button. You will then be able to enter starting and ending rates for your term/semester. A term/semester cannot overlap with another one.

Modifying a Term/Semester

To modify an existing term/semester, first highlight the term/semester in the list, and then click on the **Edit** button.

Deleting a Term/Semester

To remove a term/semester first highlight the semester in the list, and then click the **Delete** button.

Centers and Classrooms

Purpose: Create and edit centers, classrooms and location groups.
Way to Access: **Administration** > **Centers & Classrooms**

This screen shows a tree list of the centers, classrooms and location groups for your college (your top home level). You can expand and collapse groups which are containers of classrooms and centers.

Creating New Locations

Use this screen to create a new location (center, classroom or group) by clicking on the Create New button.

Deleting Locations

Select a center, classroom or group, then click on the Delete button.

Location Group

Use these to group your Centers and Classrooms.

Center

- **Center**: Add Subject Areas and Services to this location. Center is the most common type of Location in which students select from options when they sign-in/out.

Subject Areas Tab

- **Subject Areas**: To set up the Subject Areas offered by a center.
    - place a check next to every Subject Areas you want to offer in your Center.

Services Tab

- **Services**: To set up the services offered by a center.
    - Click on **Create New** to create a new service, enter the name, the description and then save the changes.
    - To edit an existing Service, simply highlight the service by clicking on it and then press the **Edit** button. Enter your changes and don't forget to click on **Save Changes** when you finish it.

Classrooms

- **Classrooms**: Classes are added to this location. Classes are not used very often in Accudemia but can be used if you want to track a scheduled class or event that takes place every week at the same day and time during the Term/Semester.

Subject Areas

Purpose: To edit, delete and add subject areas or courses into to your Accudemia College Account.
Way to Access: **Administration** > **Subject Areas**

Accudemia lists your Subject Areas in the grid of the **Subject Area** screen. For tracking center attendance, it is only important to define subject areas if you wish students to sign into centers and track subjects. Tracking of subject areas can be disabled for center attendance. If this is disabled you don't need to create subject areas or classes (unless you also use class attendance). Note that subject areas are college wide, while services are only for a center. Collecting this data makes it possible for Accudemia to report on the usage of your facilities based and break that information down by subjects. Also, note that a student may sign in to many services, while only to one subject.

Subject Areas Tool bar

Note: *If the subject area has multiple classes, Accudemia will display a pop up window with a drop list to select the class to modify.*

Create New: To create a New Subject Area.

- **Edit**: To edit Subject Area information.
- **Delete**: To delete Subject Area.
- **Drop/ Undrop**
  - **Purpose**: To drop or undrop students from classes. Registered students can be dropped. Dropped students are unregistered from a class and the drop date is marked in the system. Students can be unregistered without being dropped through the student registration screen (In User Accounts), but no record remains of those actions and is as if the student never registered. Dropped students can be listed in the class attendance reports. The list shows the student's name, User ID, Email address, date of registration and if the class was dropped, the date it was dropped. The Status icon shows green when the student is active in the class, red if dropped.
  - **To drop a student**: Select the student from the list and click on the Drop button
  - **To undrop a student**: Select the student from the list and clock on the Undrop button

- **Session History**
  - **Purpose**: To cancel or restore sessions. In this screen you will see a list of past sessions for the class selected in the previous screen. You can use the filter option on top the top to filter search sessions for specific dates.

- **Canceling Sessions**: Select one or more given sessions (with the green icon under the Given column) from the list, the click on the Cancel Sessions button on top.
- **Restoring Sessions**: Select one or more canceled sessions (with the red icon under the Given column) from the list, then click on he Restore Sessions button on top.

- **Advanced Scheduler**
  - **Purpose**: To enter the schedule and exceptions for a class. This screen shows the Weekly Schedule and the Exceptions for a class in separate tabs.
  - **The Weekly Schedule**: To view the weekly schedule of your class click on the Weekly Schedule tab. This tab is opened by default when entering this screen. The weekly schedule defines the normal schedule for a class that repeats every week and any cancellations of that weekly schedule.
  - **Creating New Weekly Sessions**: Click on the Create New button on top of the Weekly Sessions list. A pop up window will appear and prompt you to enter a classroom, day of week, time and duration. Past sessions are not modified when the weekly schedule is modified. If you want to update past sessions based on the current weekly schedule see the Updating Past Sessions section.
  - **Deleting Weekly Sessions**: Click on the Delete button on top of the Weekly Sessions list. Past sessions are not modified when the weekly schedule is modified. If you want to update past sessions based on the current weekly schedule see the Updating Past Sessions section.
  - **Updating Past Sessions**: If you modify the weekly schedule and wish past sessions matching the current weekly schedule be created, click on the Update Past Sessions button. You will be able to create or delete past sessions. You may also delete only unattended past sessions by checking the corresponding option.
  - **Exceptions**: To view the exceptions click on the Exceptions tab. Exceptions are extra classes that are only offered once.
  - **Creating New Exceptions**: Click on the Create New button on top of the Weekly Sessions list. A pop up window will appear and prompt you to enter a classroom, day of week, time and duration.
  - **Deleting Exceptions**: Select an exception from the list, then click on the Delete button.
- **View Schedule**
  - **Purpose**: To display Class schedule in a calendar.
  - **Edit**: It access to Advanced Scheduler Screen.
  - **Display Dates From**: Use Filter tool to select the date from when classes will be displayed.

Create a Subject Area

General Information Tab

Code: Subject Area Code. Type the Prefix at the first text box. Type Number at second box.
Title: This field is the name of the subject area.
Description: Type any description of the subject area This will be displayed at Subject Areas list.
Active: To set the status of the subject. It will not be displayed in any report.
Has Scheduled Classes: Check the Box “Has Scheduled Classes” to add classes.

Centers Tab

Select the centers where this subject Area will be available. All items will be selected by default.

Tutors Tab

Select the tutors that will be tutoring at. There is other list with tutors related to all Subject Areas.

> ***Note:*** *Registrations are for a specific Term. This registration must been selected for the Semester/Term*

Has Scheduled Classes

When Has Scheduled Classes box is not checked

- **Instructors**: Select the tutor who is related to the class. It creates a class by default after clicking **Save Changes**.
- **Student Enrollment**: Select the student enrolled to this subject area in the selected Semester/Term.

When Has Scheduled Classes box is checked

A new Tab will be displayed: **Scheduled Classes**
Purpose: To Create, Edit and Delete Classes.

Scheduled Classes Tool bar

- **Create New**: To create a New Class related to the edited Subject.
- **Edit**: Allows modification to some of the options of the Class.
- **Delete**: Delete the selected class.

Creating a new Class

After clicking **Create New**, a pop up window will be displayed with the following tabs:

- **General**: Basic Information.
    - **CRN**: It is the course reference number that you'll need to provide at the time of registration. The same course may have several different CRNs or sections.
    - **Class ID**: It is the class Identification number or code.
    - **Display as**: This is what is shown to the user. Automatically, this is updated by the Class ID and the name of the subject. This can be edited.
    - **Other**: It's a secondary way to name the Class.
    - **Comments**: Comments that is show to users.

- **Tardy Period**: Range of time which students can be considered as tardy. This range of time can be set by default at Control Panel> Class Attendance. Also, you can select the option **Never late if present**.
- **Cut-Off Period**: Range of time which students are considered as absent. This range of time can be set by default at Control Panel> Class Attendance. Also, you can select the option **Never absent, no matter how late**.
- **Active**: If you want to keep the class for reporting purposes, you can make the class inactive instead of deleting it completely.

- **Schedule**: Schedule Class Information.
  - **Classroom**: Location where the class is going to take.
  - **Date & Time**: Schedule your class information.
  - **Start Time**: Class start time.
  - **Duration**: Class duration.
- **Instructors**: Select the tutor who is related to the class.
- **Student Enrollment**: Select the enrollment students to this subject area in the selected Semester/Term.

Manually Signing In and Out

Bulk Sign In

Purpose: To add sign in sessions for students manually.
Way to Access: **Center Attendance** > **Sign In/Sign Out** > **Manual Sign In**

Use this screen to sign students in manually. It is highly useful when students forget to sign in or couldn't sign-in because the system was off line or the tutoring session took place outside of the center. Here are the steps for signing a student in:

1. Select the Sign In date and time
2. Select the center from the "Center" drop-down box. Option is possible for College Administrator only. The Center Administrator will be shown his the assigned center.
3. Select the Subject from the "Subject" drop-down box.
4. Select the tutor from the "Tutor" drop-down box.
5. Select the instructor from the "Instructor" drop-down box.
6. Select the service.
7. Select the student or students.
8. Click on "Bulk Sign In". You will see a confirmation message. The Signed In students will disappear from the list.

Bulk Sign Out

Purpose: To sign students out manually.
Way to Access: **Center Attendance** > **Sign In/Sign Out** > **Manual Sign Out**

On some occasions, you may want to sign students out manually. This might be because a student forgot or neglected to sign out, or because it's closing time and you want to sign everyone out quickly.

You see a list with the students who are signed in at present. To sign students out, follow these steps:

1. Select the students you want to sign out.
2. Select the sign-out time or the duration period
3. Click on the "Bulk Sign Out" button.

When the sign out process is completed, a confirmation message appears and the signed out students disappear from the list.

Bulk Sign In/Out

Purpose: To sign students in and out at the same time manually.
Way to Access: **Center Attendance** > **Sign In/Sign Out** > **Manual Sign In/Out**

This screen enables you to sign the student in and out at the same time. This feature is useful for entering visits from a sign-in sheet or off-site meetings for example.

To sign students in and out, follow these steps:

1. Select the Sign In date and time
2. Select the Sign Out date and time
3. Select the center from the "Center" drop-down box. Option is possible for College Administrator only. The Center Administrator will only be shown his assigned center.
4. Select the subject from the "Subject" drop-down box.
5. Select the tutor from the "Tutor" drop-down box.
6. Select the instructor from the "Instructor" drop-down box.
7. Select the service.
8. Select the student or students.
9. Click on "Bulk Sign In/Out". You will see a confirmation message.

Session Logs

Purpose: To enter comments on sign-in sessions and modify session records.
Way to Access: **Center Attendance** > **Session Logs**

Using the Search

You will see a search button on this grid, use it to restrict the record search to a certain time period by entering the **From** and **To** dates. You can also restrict the viewed records to a certain center (if you are a college administrator) and also search for records that have session comments. Clicking on the "Search" button brings to the forefront a search tab (which you can access directly by clicking on it as well). Use the grid ordering and filtering functionality (clicking on the column headers) to order the list by Student, Course, Tutor or Instructor and also to further filter down information

Entering or Editing Comments

If you wish, you can enter comments on each sign-in session Accudemia records. This is handy if you want to keep a journal of each sign-in session. For example, if you have a tutoring center, tutors can use this feature to keep track of what they did during their meeting with each student. This would serve as a progress tracker for tutors, a method for tracking meetings for administrators, and as a record for the center. To view a comment, simply highlight the session by clicking on it and click on the "Comments" button.

> ***Note:*** *A small icon is shown next to the student names in the grid if a comment was added to the session.*

Editing a Session

To edit a Session, first select the log by clicking on it, and then click on the "Edit" button. Now you can edit the Date, Time, Subject, Tutor, Instructor and Services.

Who's In?

Purpose: To check sign in students and tutors into Accudemia.
Way to Access: **Center Attendance** > **Who's In**

The Who's In screen lists signed in students or tutors. For students, you will see the date and time of the sign in as well as the subject, service, tutor and details.
For tutors you will see the Sign In and Center information.

Searching Users

Use Show Filters label to view the data under your own criteria. Click on the "Show Filters" button to bring up search filters in a search label on the top side of the screen.
Select the center you wish to check. This option is possible for the College Administrator only. The Center Administrator will be shown his assigned center only.
You can filter for a specific subject. Select the subject you wish to check or select to show "all". In the Person Type section you can specify if you want to see signed in students or tutors.
Click the "Apply" button to filter your data according to the input information.
Click the "Clear" button to clear all the data to filter.

Surveys

Purpose: To define the surveys to collect user feedback.
Way to Access: **Administration** > **Surveys**

Click over **Pending Surveys** to see and respond to any pending surveys awaiting completion thru this screen.

Survey Toolbar

- **Create New:** To create a new Survey.
- **Edit:** To edit created surveys.
- **Delete:** To delete surveys.
- **Clone:** To create a new survey with the same questionnaire.
- **Preview:** To preview the questionnaire of the survey.

Create/Edit Survey

Click on the corresponding button on top of the screen and follow the steps described in Online Help.

Start/Stop Survey

Select your survey and click on the Start/Stop button on top of the screen. Green stands for started and red for stopped surveys.

Preview

Use the Preview option to verify the presentation of the survey.

Delete Survey

Select a survey by clicking on it and then press the Delete button. All the records will be deleted. If you want to keep the history for reports you should make the survey inactive (stop) instead of deleting it completely.

General Information Tab

Important! Some options change the screen, hiding some unnecessary options.

Survey Name

Choose a name for the survey. This name serves only for internal purposes.

Display to User

This setting shows the times that the survey will be displayed to the user.

- **Only Once:** Display the survey to the user only once. You can set the date to be displayed at **Advanced Settings**.
- **Recurrent:** Displays the survey to the user more than once. Also, it can be set the way of trigger it at **Advanced Settings**
- **Manual:** This option is displayed to users belonged to a Group. Select this mode to display the survey the times that administrator send it. This option displays a different tab, **User Group**.

Survey Event

Use this setting to set the place where the survey will be triggered.

- **Signs in:** The survey is triggered at a Sign in station.
- **Accesses through Internet:** The survey is triggered when the user logs in through internet.

Sign-in basis

Use this setting to set when the survey must be displayed to the user.

- **Center:** Select the Center where the survey is triggered.
- **Service:** Select the service which is the survey is triggered.
- **Subject Area:** Select the subject area which is the survey is triggered.
- **Tutor:** Select the tutor which is the survey trigger.

Show at

Use this setting to set when the survey will be displayed.

- **Internet access:** It is triggered when the user logs in at his Homepage.
- **Sign in:** It is triggered when the user signs in to a center.
- **Sign out:** It is triggered when the user signs in to a center.

Show to

To set the user type who are going to receive the surveys.

- **Students**
- **Instructors**
- **Tutors**
- **System Users**

Questionnaire Tab

A questionnaire can have multiple pages. You can add or delete pages. For a question you can define the text to be displayed (you can use colors and various fonts), the type of question, if they are required and then answer choices if the question is multiple choice. When you select multiple choices, a new check box will be display with the option to allow multiple responses. You can move the questions up or down within a page. You can also move the questions up or down.

Use the Preview option to verify the presentation of the survey.

Schedules

This area allows the users to define a normal weekly calendar and also special exceptions at Accudemia's Calendars. Use the weekly calendar to define a normal working week. Use exceptions to define special events, such as school and public holidays for off-times, or in the case of tutors, they can use exceptions to indicate times when they won't available or vacation days outside of their normal schedule.

Off-times

Purpose: To enter time periods during which tutors are not allowed to be scheduled as available.
Way to Access: **Administration** > **Off-times**

Use this screen to define time frames when your college is closed and tutors are not allowed to be schedule as working. You can define a regular weekly college schedule or exceptions such as school and public holidays.

> ***Note:*** *The College off times super imposes the Center Off-times and Tutor schedules, meaning college off time are shown as not available to the centers or the tutors.*

> ***Important!*** It is important that you enter the off-times before deploying the appointments scheduling module to ensure that no appointments are scheduled during off times.

Tutor Schedule

Purpose: To edit Tutor's availability.
Way to Access: Center Attendance > **Tutor Schedule**

This page allows you to edit all tutor's availability/schedule. You can edit it using the **Edit Mode** drop list. Use **Tutor** drop list to select the correct tutor. Use **Center** to choose the center where tutor is available.

Ways to edit Tutor's Schedule

Choose from the following *Calendar Edit Modes*:

- **Merged Mode:** This is a combination of the **Term Mode** and **Exceptions Only**
    - To edit the schedule in this mode you have to choose the week which you are going to edit. Additionally you have the option to display appointments.

***Important! Merged Mode** You cannot edit dates in the past while using this calendar edit mode.*

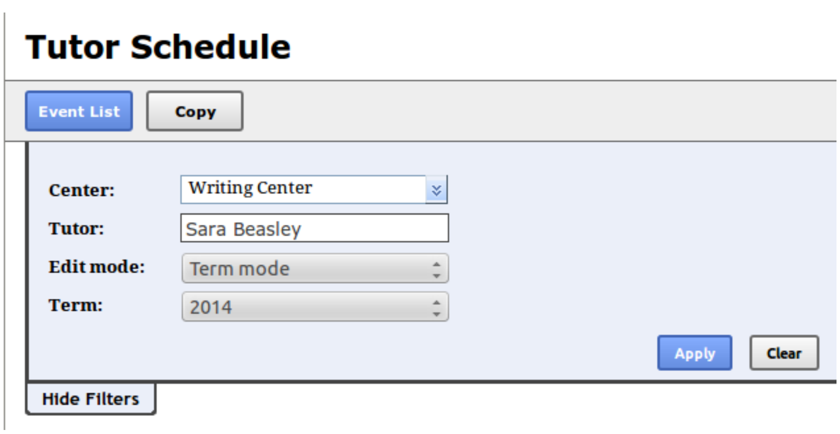
- **Term Mode:** This is the default *calendar edit mode*. In this mode you are allowed to edit the Tutor's Availability for the entire Term/Semester. This is like their regular work week.

- Use **Term mode** to select the Term/Semester which your tutor's availability. You can schedule as Available, Not Available, Not Working and Cleared using the Event Information.

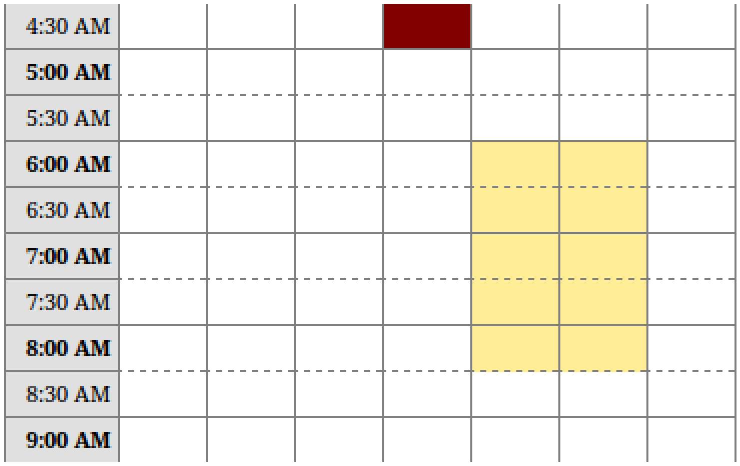
- **Exceptions Only:** This mode allows you to edit the Tutor's Schedule by setting exceptions to their normal schedule like off-time needed on specific dates.

To schedule a tutor

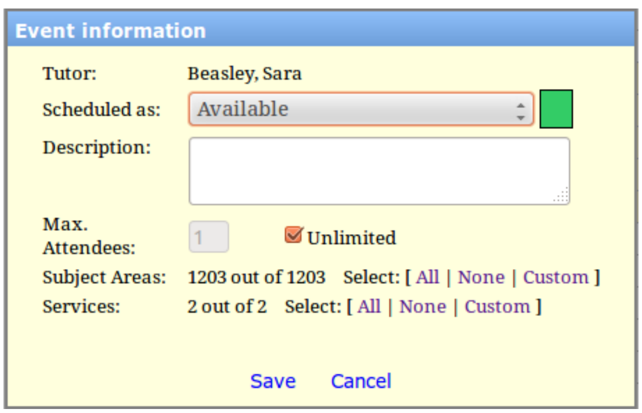
1. Go to **Tutors Schedule** in the left-side navigation menu under **Center Attendance** and enter the information (Tutor Name, center, etc):



2. Then click the **Apply** button
3. Next click and drag the mouse to create a block in the calendar:



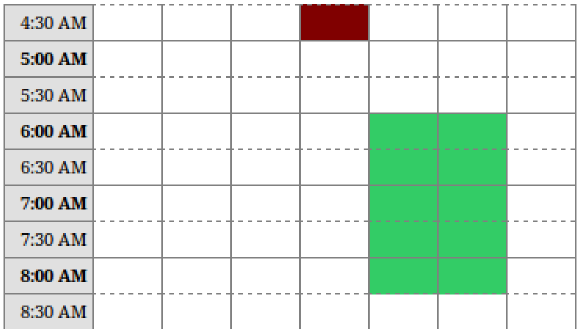
4. Enter the information for the selected time:



- **Schedule As:** This is the "status" of the tutor, "Available" means they can be selected for walk-ins or appointments if desired.
- **Description:** This could be any additional information about this block of time you are setting up for the tutor.
- **Max Attendees:** This is the maximum amount of Students the tutor can meet with at the same time.
- **Subject Areas:** Select only what you want the Tutor to be able to help with during the time block.
- **Services:** Select only what you want the Tutor to be able to help with during the time block.

Note: *When assigning a schedule to a Tutor you have Availability Statuses such as* ***Available*** *(Green),* ***Not Available*** *(Red),* ***Not Working*** *(gray/shaded),* ***Working in Another Center*** *(Maroon) and* ***Cleared*** *(white/clear).*

5. And click the **Save** button.



Calendar Daily Viewer

This page displays daily Tutors Schedule. It shows the current day and the first center listed at **Centers & Classrooms** page as default.

- Use **Show Filters** to filter tutors related to centers and non-predefine dates.
- Use **Date** to show a selected day.
- Use **Center** to display the center where the tutor is be working at.

To show click over **Apply** to display your filter information. Use **Print** button to print your filtered information. To start over new to filter click over **Clear**.

> ***Note:*** *When there is no tutor working on the selected day, Accudemia will display the following text:*
>
> ***There are no tutors working in this center this day. Please change tutors' availability in tutors' schedule screen or contact your administrator.***

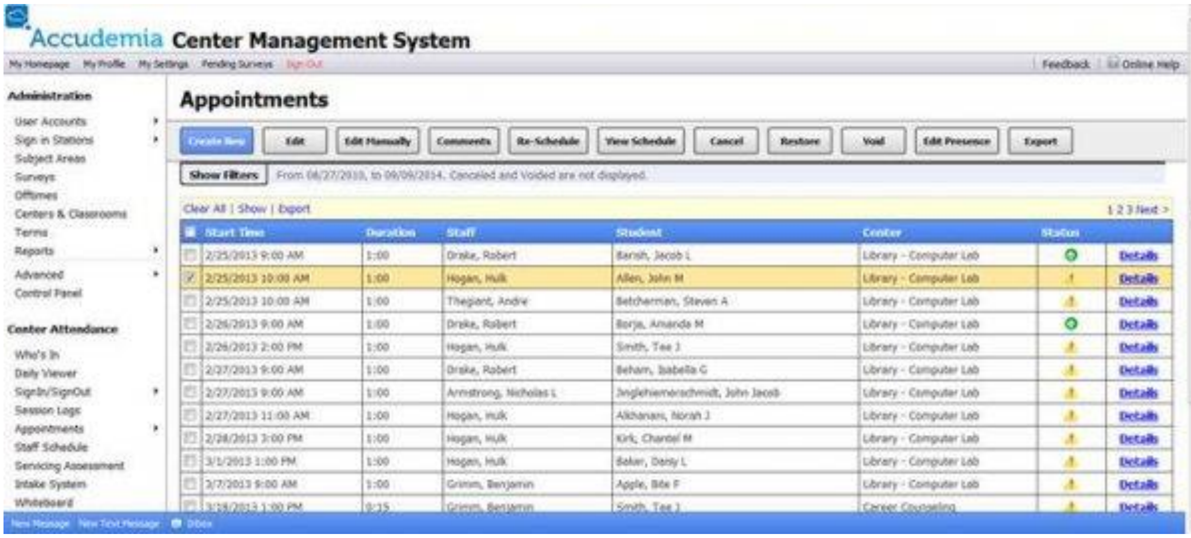
Appointments

This section explains how to create, manage, and adjust rules regarding appointments.

Mark a Student as a Show when getting a No-Show

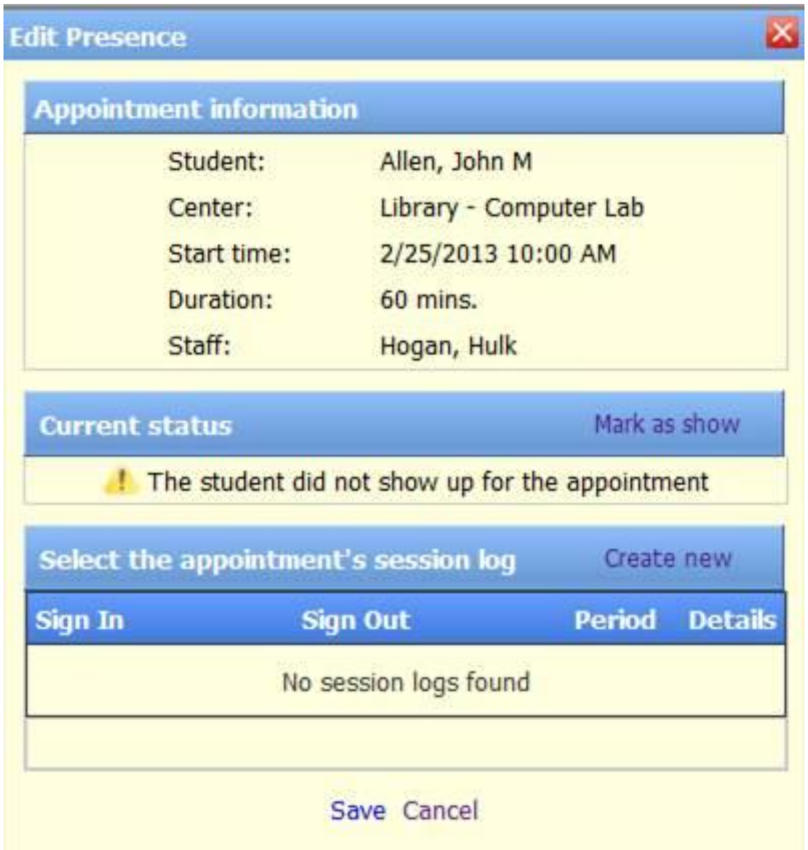
1. Go to Appointments > View All

2. Select the student with the No-Show.



3. Click the button above that says "Edit Presence."

4. From here click the “Mark as Show” link.



5. Now you will be prompted to select the Session Log that was created for that student. If there is not one you can then create one at that moment by clicking the “Create New” link.

6. Confirm by clicking “Yes.”

7. They should now be counted and have a log for the session that is automatically created based on all of the appointment info already in the system!

New Appointment

Purpose: To Schedule student-tutor appointments.
Way to Access: **Center Attendance** > **Appointments** > **New Appointment**

Use this module to schedule appointments between student and tutor using Open Slots selectors. Students, Tutors and Authorized Administrators can access this area.

Use “Show Filters” to display available Tutors to set the appointment.
From / **To**: To filter the Start and End date of the appointments.
Center: To filter by center.
Tutor: Type the Tutor's Name; it will display a list with the matched tutors.
Subject Area: Type the Subject area; it will display a list with the matched subject areas available at Accudemia. Click the **Search** button to start filtering.

When Accudemia founds out the available tutors it displays two main sectors:

- **References**: It displays a Color Reference items. The color shows the availability level.
- **Search Results**: It displays a list of tutor's boxes. Click on the boxes below to view the schedules.
    - It will display a **New Appointment** pop up window.
    - Follow the steps to set an appointment.
    - Click the Accept to finish set the appointment.

After you set the appointment, the schedule will change its color depending of Tutor's maximum attendees' availability. It will also display the number of appointments set with the tutor over that time block.

If there is not an available tutor Accudemia will display the following text: "Sorry, no open slots were found with the specified criteria. Please specify a filter criteria and click on Search."

View Appointments

Purpose: To view, cancel, edit or void scheduled appointments between a student and a tutor in a list or schedule (calendar) format.
Way to Access: **Center Attendance** > **Appointments** > **View All**

If you are logged in as a college administrator you will able to view scheduled appointments for all tutors and students. You can use the search feature to view appointments from a specific student, tutor, or center. You may also use the search feature to view canceled and voided appointments.

Appointment Status

After an appointment has been scheduled, its status will automatically change from upcoming, to taking place, and finally to a past appointment as long as the student signs in as scheduled. There are also three other status changes that can be made to an appointment.

Canceled: Appointments can be canceled prior to the scheduled appointment time. This will remove the appointment from both the appointment list and the schedule unless the search option is selected to show canceled appointments. Email notifications will be sent to both the student and tutor at the time of cancellation. Tutors and students are able to cancel their own appointments while administrators can cancel other user's appointments.

No Show: An appointment is recorded as a "No Show" if the student does not sign in within the designated time frame controlled in appointment settings.

Voided: Appointments can only be voided if they are already recorded in the Accudemia System as Cancelled or No Show. This will remove the appointment from both the appointment list and the schedule unless the search option is selected to show voided appointments. Voiding an appointment can be used as a way to excuse a no show or cancellation. When voiding an appointment the user is asked to give a reason for the void. This reason can be seen in the appointments detailed history report.

Cancelling an Appointment

To cancel a scheduled appointment in list view, select the appointments you want to cancel and select **Cancel Appt.** button at the top of the screen.

To cancel a scheduled appointment in schedule view, click on the appointment you want to cancel and a box will pop up with the option to cancel the appointment. Select **Cancel** and the appointment will be removed from the schedule.

Re-Schedule Appointments

This tool allows you to edit your appointment. You can change your date; start time of the appointment and the duration. After made your changes to your appointment click the **Schedule Appt.** button to save your changes.

Restore Appointments

To restore future cancelled appointments.

1. Use the filter to select the option to display canceled appointments.
2. Select the canceled appointment.
3. Click **Restore** to mark as “No Show” and restore your cancelled appointment.

Edit Presence

This tool is displayed only for appointments administrators. It allows change the appointment status from **No Show** to **Show**.

1. Select your “No show” appointment.
2. Click the **Edit Presence** button. A pop up window will display the appointment information and his current status.
3. Click the **Mark as show** button to select the appointment's session log. If user has no session log, there is an option that allows you create a new one. Automatically, Accudemia will change the appointment status to **Show**.

Appointment Wizard

Purpose: To schedule student-tutor appointments.
Way to Access: **Center Attendance** > **Appointments** > **Wizard**

Use this module to schedule appointments between a student and a tutor.

When you first enter at “Wizard” you will be shown the “Student Selection” box.

1. Select the student(s) to set the appointment(s), Accudemia allows you to select up to 5 students, click on his (their) name(s) at the grid.
2. Click **Next** to be able to select the day(s) to schedule the appointment(s).
3. Click **Next** to select the Subject Area(s).
4. Click **Next** to select the Service(s).
5. Click **Next** to select the Tutor(s).
6. Click **Next** to display the Tutor's schedule. At this page you are able to select the date and duration by clicking and dragging over the available time slots. If you want to change a default value you can click the “reservation” and change the time or duration to the one you want.
7. Click **Next** to validate the appointments. That last step will show a description of the appointments you are trying to schedule. You might find that some of them are valid and some of them are not. You can go back and select another date or just click Finish to schedule the valid appointments. Please take into account that the invalid appointment will never be scheduled so you might want to pick another time or tutor.

Manual Appointments

Purpose: If an Administrator needs to schedule an appointment disregarding rules.
Way to Access: **Center Attendance** > **Appointments** > **Manual**

This method is pretty straight-forward, you just select all the details you want (student, tutor, center, subject area, services and dates) and click on Schedule Appointment. You can also add comments if you want to.

After selecting the options click on “Schedule Appointment” and wait while Accudemia validates the reservations.

If the entered data is valid, it will tell you that the appointment has passed all the validations. To schedule the appointment you have to click on “Save changes”.

It might also happen that Accudemia finds that the selection is not valid, maybe because there are some restrictions on the student or the tutor, or because the tutor is not available or any other reason. Either way, you will only be warned. You can still click on “continue anyway” to accept the warning and schedule the appointment no matter what.

Reports

General

Depending on the Report Type, you have different filter options to choose from. The Period Filter gives you the possibility to filter information for a certain amount of time: Today, Last week, Last month, per Semesters or as entered in the calendar dates.

Formats

When you have selected all the required filter data you can choose from the following formats:

- Portable Data File (PDF)
- Excel Formatted Report (XLS)
- Microsoft Word (DOC)
- Web Archive (HTML)
- Extensible Markup Language (XML)
- Comma Separated Values (CSV)

Reports History

Accudemia has the possibility to review reports. Use the **Share Report** button to send the report via e-mail to users that you want.

Important! *The report history gets deleted automatically after 30 days.*

Note: *Sometimes your report is too long to being processed quickly, so Accudemia added this option so you can feel free to leave the page. Then you can view your requests' status at any time on the* ***Report History*** *screen.*

Note: *If Accudemia has your e-mail on your account it can send you an email when the report is completed if you click the link that appears while it is processing your report.*

Administrative Reports

Student Profile

Purpose: Shows statistics on student profile questions for visitors.
Available Filters: Period, Centers
Description: This report shows each demographics question that the system tracks. For each question, the report lists the available answers. For each answer, the report shows number of students, their number of visits, and total sign-in time of students who selected that answer.

Note:

1. *The report reports on all students in your database, whether they visited or not.*
2. *If one of the available answers is not shown, then no one has selected that answer during the reporting period.*

Users Detailed Profile

Purpose: Displays user's profile questions.
Available Filters: Groups.
Display options: Hide Deleted Questions and Answers.
Description: This report shows user's detailed profiled questions. Also, enables the option to display deleted questions.

Survey Results

Purpose: Displays survey results.
Available Filters: Surveys.
Display Options: Show Pie Charts.
Grouped by: Survey questions.
Order: Survey questions.
Description: This report shows the survey evaluation.

Session Surveys Results

Purpose: Shows surveys results grouped by criteria. The surveys to display must contend multiple choices Option.
Available filters: Tutor, Surveys, Location and Services, subjects.
Display options: Show pie charts.
Descriptions: This report will show survey results. It can be grouped by Center, Tutor, Subject area and Services.

Enrollment by Student

Purpose: Lists students and the subjects registered.
Available Filters: Semester, Students, Groups, Subjects, Centers.
Display Options: Student ID.
Grouped by: Student.
Order: Alphabetical by student's last name and then by subjects.
Description: This report shows the courses each student is registered in. The report shows the class and the registration date and time. The last column shows how the registration was made (by data import, administrator, or student).

Enrollment by Subject Area

Purpose: Displays class registration info.
Available Filters: Semester, Subjects, Students, Groups, Centers.
Display Options: Student ID.
Grouped by: Subjects.
Order: Alphabetical by subjects and student.
Description: This report shows the students registered in each Subject. The report shows the student's name and the registration date and time. The last column shows how the registration was made (by data import, administrator, or student).

Student List - Only Names

Purpose: Shows a list of all students.
Available Filters: Students, Student groups.
Display Options: Student ID.
Description: This report lists the names of the students who visited your center.

Student List - Incl. Addresses

Purpose: Shows a list of all students who visited a center or centers during a certain time period.
Available Filters: Period, Students, Groups, Centers
Display Options: Student ID
Description: This report lists all students in the system which visited the center during a certain time period, including name (last, first), address, and email address. The report also shows whether the student's record is currently active.

Student List - Incl. Addresses (Visited)

Purpose: Shows a list of all students who visited a center or centers during a certain time period.
Available Filters: Period, Students, Groups, Centers
Display Options: Student ID
Description: This reports lists all students in the system which visited the center during a certain time period, including name (last, first), address, and email address. The report also shows whether the student's record is currently active.

Tutor Assignments

Purpose: Displays the subjects areas that the tutor is assigned.
Available Filters: Tutors, Groups, Subjects Areas, Semester
Display Options: Show Person ID
Description: This report shows each subject area that the tutor is assign to each term.

Center Attendance Reports

Attendance Summary

Purpose: Shows visits per service.
Available Filters: Period, Locations, Summery By.
Summery by: Subject Area, Location, Service, Instructor, Tutor.
Display Options: Show Pie Charts.
Description: This report shows the number of visits and the periods spend on the chosen subject (summery by…).

Attendance by Student

Purpose: Shows a detailed list of students' attendance.
Available Filters: Period, Locations and Services, Students, Groups, Subjects.
Display Options: Show Person ID.
Description: This report provides detailed information about visitors and their attendance. The report lists each student. Under the name, the report lists subject this student used. For each subject, the report lists the sign-in sessions (sign-in date and time, sign out date and time, and time spent). The total time the student spent on each subject is also shown in this report.

Attendance by Tutor

Purpose: Shows a detailed list of tutors' attendance
Available Filters: Period, Locations and Services, Tutors, Students, Groups, Subjects.
Display Options: Show Person ID.
Description: This report provides detailed information about tutors and their attendance. The report lists each tutor. Under the name, the report lists subject this tutor has taught. For each subject, the report lists the sign-in sessions (sign-in date and time, sign out date and time, and time spent). The total time the student spent on each subject is also shown in this report.

Attendance by Subject Area

Purpose: Shows usage of subjects offered at your center
Available Filters: Period, Locations and Services, Students, Groups, Subjects.
Display Options: Show Person ID
Description: The Subject Area Detail Report provides information about the subjects at your center. For each student, the report lists the sign-in sessions (sign-in date and time, the sign-out date and time, and the sign-in period).

Attendance by Services

Purpose: Shows visits per service.
Available Filters: Period, Locations and Services, Students, Groups, Subject.
Display Options: Show Person ID.
Description: This report lists each service and for each service, lists the students that signed in and selected it. For each student the report shows the sign-in time, sign-out time and sign-in period.

Attendance by Services (incl. Subject Area)

Purpose: Shows visits per service.
Available Filters: Period, Locations and Services, Students, Groups, Subjects.
Display Options: Show Person ID.
Description: This report lists each service and for each service, lists the students that signed in and selected it. For each student the report shows the sign-in time, sign-out time and sign-in period and visited subject.

Attendance by Instructor

Purpose: Shows the subject of students of each instructor.
Available Filters: Centers, Instructors, Students, Groups, Subjects.
Display Options: Show Person ID.
Description: This report lists each instructor and classes (subjects) associated with the instructor. Students who signed to the class are also listed, and for each visit, the report shows the sign-in date and time, the sign-out date and time, and the sign-in period. The total time for each student is also calculated.

Appointments - Scheduled

Purpose: Displays scheduled appointments in the past or the future.
Available Filters: Locations, Students, Tutors, Groups, Period.
Display Options: Show canceled appointments, Show voided appointments.
Description: This report lists all of the appointments scheduled for the selected period of time. For each appointment the report shows the Student, date and day of appointment, scheduled start and end times, subject, service and whether the appointment is scheduled as exclusive.

Appointments - Daily

Purpose: Displays daily appointments
Available Filters: Locations, Students, Tutors, Groups, Period.
Display Options: Show canceled appointments, Show voided appointments.
Description: This report lists all appointments by date separated by tutor. For each appointment the report shows the scheduled start and end times, subject, service and student.

Appointments - History

Purpose: Displays history of past appointments.
Available Filters: Locations, Students, Tutors, Groups, Period
Display Options: Show voided appointments.
Description: This report lists past appointments for the selected period of time. For each appointment the report shows tutor, student, date, scheduled start and end times, subject, service, whether the appointment was canceled and whether the appointment is recorded as a no show.

Appointments - Detailed History

Purpose: Displays detailed history of past appointments.
Available Filters: Locations, Students, Tutors, Groups, Period.
Display Options: Show Voided Appointments.
Description: This report lists appointment details for past appointments for the selected period of time. For each appointment the report shows the date, time, subject, service, student, tutor, who scheduled the appointment and their role, date and time the appointment was scheduled,

whether the appointment was exclusive, whether the appointment was canceled and if the appointment was recorded as a no show.

Appointments - No Shows

Purpose: Displays no shows appointments.
Available Filters: Locations, Students, Tutors, Groups, Period.
Display Options: Show canceled appointments, Show voided appointments.
Description: This report lists by student all appointments that have been recorded as no show. For each appointment the report shows tutor, date, scheduled start and end times, subject and service.

Visitor History

Purpose: Shows some information about the visits of each visitor.
Available Filters: Period, Students, Groups, Locations.
Display Options: Show Persons ID.
Description: This report lists each student that visited the center during the reporting period. For each visitor the report shows the student's number of visits, the date and time of his or her first visit, the date and time of his or her last visit, and the average visit's time for the that student.

Weekly Visits

Purpose: To show the number of weekly visits.
Available Filters: Period, Subjects, Instructors, Student, Locations.
Description: The report shows the number of times a student visited a subject per week.

Zero Visits

Purpose: To show students who never visited your center.
Available Filters: Period, Locations.
Display Options: Show Person ID
Description: This report lists each student that didn't visit your center during the reporting period.

New Visitors

Purpose: To show new visitors during the reporting period.
Available Filters: Period, Students, Groups, Locations.
Display Options: Show Person ID.
Description: This report lists each new student to your center.

Session Comments

Purpose: Displays comments entered on sign-in sessions via the "Session Log" screen.
Available Filters: Period, Locations and Services, Students, Subjects.
Display Options: Show Person ID
Description: This report shows comments on sessions. Note that this report only shows sessions with comments.

Tutor Hours

Purpose: To show the number of hours that a tutor has sign in to their corresponding center in a period.
Available Filters: Groups, Tutors, Period
Display Options: Show tutor Id
Descriptions: This report displays the hours that a tutor was tutoring in all college centers. It records all dates that user make a sign in and a sign out.

Session Log with Surveys

Purpose: Shows all the sessions logs which a survey has been displayed to the users.
Available Filters: Surveys, Locations and Services, Tutors, Subject Areas and Period.
Descriptions: This report display the answers of each survey that users make before to make a sign in into a Center.

Traffic Analysis

Purpose: It shows many different reports with graphics mode reports about your college traffic. Use Traffic Analysis Report Configuration to customize the data to download.
Available Filters: Locations.
Display Options: Session Time Reports, Visit Reports, Student Reports.
Descriptions: This Bulk report it's automatically download to your Personal Computer as a zip file. This Report contains all the fields selected as default.

Class Attendance Reports

Summary

Purpose: To show a list with the summary data of classes in period.
Available Filters: Classes, Students, Groups.
Description: This report displays a list with Students, Student Identification Number, date of Registration, Dropped date, Attended and Absent times, Tardy and excused absentees.

Detailed

Purpose: To show detailed students information about their classes.
Available Filters: Classes, Students, Groups, Instructors.
Description: This report displays each class with student class information. The way that student has been logged on.

Absentees

Purpose: To show a list of absentees per class session.
Available Filters: Classes, Students, Groups, Instructors.
Description: This report displays a full list of absentees each class session.

Absences List

Purpose: To show a list of the absences of registered students.
Available Filters: Classes, Absence Range, Students, Groups.
Description: This report displays a list with the absences of registered students to filtered classes. Also displays some data as their Student Id, phone and their dropped status. Use the Absence range Also to filter users with a minimum and a maximum number of absences.

Tardiness Detail

Purpose: To display the amount of times a student has been late in a class session, also displays how long student been late.
Available Filters: Classes, Students, Groups, Professors.

Description: This report displays each student's tardiness. This displays if the student is registered to a class or dropped to it. Also displays how long the student has been late to the class session.

Tardiness List

Purpose: To display the number of times that a student has been late to a class session.
Available Filters: Classes, Students, Groups
Description: Displays each class with the times that a student has been late, also displays if it has not.

Dropped

Purpose: To show dropped students.
Available Filters: Classes, Students, Groups.
Description: This report displays the date which students were dropped, and the classes where he students were dropped in a period. The analyzed period is the current Term/Semester as default. You can customize that option.

Unregistered Students

Purpose: Displays all students that do not belong to a class who signs in to a class session.
Available Filters: Classes, Students, Groups.
Description: This Report displays unregistered students to classes where they have sign in.

Overall

Purpose: Displays the percentage of absences of each class.
Available Filters: Classes, Students, Groups.
Description: This report displays the percentage attendance and the amount of canceled classes in a period.

Classroom Schedule

Purpose: To Show the Classroom Schedule.
Available Filters: Locations, Classes.
Description: This report shows the classroom schedule. This report allows filtering by classes or Term/Semester. Displays, also, added and canceled classes.

Referral Summary

Purpose: To show Students Referrals.
Available Filters: Classes, Students, Groups.
Description: This report displays student's referral in a period. Use the filters to display the referrals in a range.

Referral Details

Purpose: To show student referral included their Description and Referral History.
Available Filters: Classes, Students, Groups.
Description: This report displays full information of the student's referral.

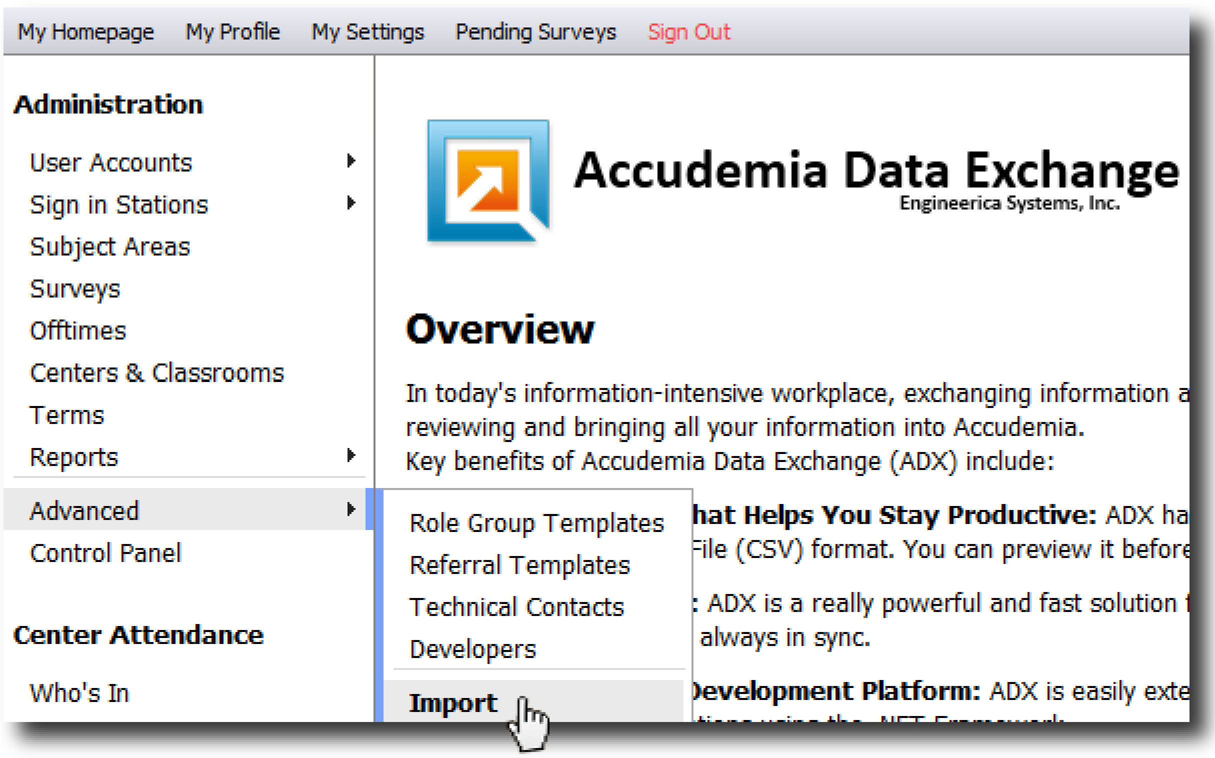
Importing & Exporting

Import Fields Info

For more technical information and to know the limitations of each field in Accudemia, please view the ADX Fields Information page on the Accudemia developer's site.

Download our Import Tool

Use ADX Accudemia Data Exchange to upload your college database. In order to start, you need to **download ADX** while logged into Accudemia under **Advanced>Import**



Installing ADX

For help on installing or reinstalling ADX, please read this.

Copying & backing up ADX configurations

For help on backing up or moving the ADX configurations around, please read this.

Data Formatting

Accudemia offers a flexible and powerful import utility that allows you to have import files with the fields and column order you like. The step-by-step import process will allow you to map your columns thus bypassing the need for separate Import Maps. The import utility, called ADX (Accudemia Data Exchange), can even schedule the import job so it would run automatically in the future.

ADX allows you to import data in several ways. You are free to select the way most convenient to you:

1. **Import from a single file:** Most commonly obtained through another systems export that includes all the student, classes, and registration data in it.
2. **Import via separate files:** Students data import, classes import, and class registration import.
3. **Do Incremental Import files:** These files would only have the latest updates.
4. **Use a Comprehensive Import file:** This kind of file stores the entire data set.

The import is usually done via a standard CSV (Comma Separated Values) text file. However, ADX can also be extended by the user to support other formats including direct connection to your student registration system.

To get started, we have prepared some sample import files with possible headers in them. Note that these are only examples and your import files could have different fields and/or field order.

- **Class Import with Schedules:**
  - Subject Area's name - **(Required & Subject Area Primary Key)**
  - Subject Area Prefix - **(Required)**
  - Subject Area Code - **(Required)**
  - Class Registration Number - **(Required & Class Primary Key)**
  - Class's Short Name - **(Required & Class Secondary Key)**
  - Class's Postfix - **(Required)**
  - Class's Days of Week - **(Required)**
  - Class's Start Time - **(Required)**
  - Class's End Time - **(Required)**
  - Class's cut-off - *(Optional)*
  - Class's tardy - *(Optional)*
  - Class's Other - *(Optional)*
  - Class's comments - *(Optional)*
  - Class's active - *(Optional)*
  - Instructor’s User ID - **(Required & Instructor Primary Key)**
  - Instructor’s First Name - **(Required)**
  - Instructor’s Last Name - **(Required)**
  - Classroom's Name - **(Required & Classroom Primary Key)**

- **Class Import without Schedules:**
  - Subject Area's name - **(Required & Subject Area Primary Key)**
  - Subject Area Prefix - **(Required)**
  - Subject Area Code - **(Required)**
  - Class Registration Number - **(Required & Class Primary Key)**
  - Class's Short Name - **(Required & Class Secondary Key)**
  - Class's Postfix - **(Required)**
  - Class Description - *(Optional)*
  - Instructor's User ID - **(Required & Instructor Primary Key)**
  - Instructor's First Name - **(Required)**
  - Instructor's Last Name - **(Required)**
- **Student Import:**
  - Student's User ID - **(Required & Student Primary Key)**
  - Student's First Name - **(Required)**
  - Student's Last Name - **(Required)**
  - Student's Email - *(Optional)*
  - Student's Phone Number - *(Optional)*
- **Classroom Import:**
  - Classroom's Name - **(Required & Classroom Primary Key)**
- **Group Registration Import:**
  - User Group's Name - **(Required & Group Primary Key)**
  - Student's User ID - **(Required & Student Primary Key)**
- **Class Registration Import:**
  - Class Registration Number (CRN) - **(Required & Class Primary Key)**
  - Student's User ID - **(Required & Student Primary Key)**
- **Center Registration Import:**
  - Center's name - **(Required & Center Primary Key)**
  - Subject Area's name - **(Required & Subject Area Primary Key)**
  - Subject Area Prefix - **(Required)**
  - Subject Area Code - **(Required)**
- **All-in-one Import:**
  - Student's User ID - **(Required & Student Primary Key)**
  - Student's First Name - **(Required)**
  - Student's Last Name - **(Required)**
  - Student's Email Address - *(Optional)*
  - Student's Phone Number - *(Optional)*
  - Subject Area's Name - **(Required & Subject Primary Key)**
  - Subject Area Prefix - **(Required)**
  - Subject Area Code - **(Required)**
  - Class Registration Number - **(Required & Class Primary Key)**
  - Class's Short Name - **(Required)**
  - Class's Postfix - **(Required)**
  - Instructor's User ID - **(Required & Instructor Primary Key)**
  - Instructor's First Name - **(Required)**
  - Instructor's Last Name - **(Required)**

It would appear that the import files we show above have a lot of redundant information in them, but realize that if the data is already imported then subsequent imports you can use only the primary or secondary keys to identify that data.

Example: *I normally run a "student" import and a "class" import like shown above. At this point I should have already created my Students, Instructors, Subject Areas, and Classes in the database. I can now simply use their primary keys to reference those items in the future imports. Now my "registration" import only has to include their primary keys:*

- *Student's User ID*
- *Subject Area Name*
- *Class Registration Number*
- *Instructor's User ID*

For more info about the database and the database requirements visit:

http://code.google.com/p/accudemiaext/wiki/ADXFieldsInformation

CSV Import Samples

Users Import

A	B	C	D	E	F	G	H	I	J	K	L	M
ID	First_Name	Middle_Name	Last_Name	Pass	Email	Phone	Address	City	State	ZipCode	Comments	Active
999-99-9999	George	Clay	Thompson	clay2962	mail@xyz.edu	(305)-229-6333	1100 NE 163rd St	Miami Beach	Florida	33109		yes
660-22-2221	Robert	O.	Mitchell	mitch88	mai2@xyz.edu	(300)-229-6232	16100 NE 18th St	Miami Beach	FL	33139	The user is...	no

Student's Group Import

A	B
User_Group's_Name	Student_ID
Athletes	999-99-9999
Graduate Students	660-22-2221
Graduate Students	999-99-10000
Graduate Students	660-22-2222
Athletes	999-99-10001
Athletes	660-22-2223

Subject Area Import

A	B	C	D	E	F
Subject_Area_Name	Subject_Code_prefix	Subject_Code	Subject_Description	Semester	Center
Languages and Philological Science	LPS-2T	02L	Languages and Philological Science since 1200 BC	Fall	Languages Lab
Physic	PHY-1T	04L	Astronomic Values & Lab testing	Fall	Physics and Lab

Center Group

A	B	C	D
Subject_Area's_Name	Subject_Area's_Code	Subject_Area's_Code_Prefix	Center's Name
Physic	PHY-1T	04L	Center A
English Composition I	ENGC 1	06E	Center A
English Composition II	ENGC2	06D	CenterB

Class Import

A	B	C	D	E	F	G	H	I	J	K
Subject Name	Subject Prefix	Subject Code	Class Reg Number	Class Name	Class Postfix	Class Other	Class Comments	Class Tardy	Class Cutoff	Class Active
Physic	PHY	1001	2245	[PHY-1001] Physics & Astronomy Class I	1A		With Dr. James Huges	10	15	yes
Physic	PHY	1001	1978	[PHY-1002] Physics & Astronomy Class II	2A		With Dr. Serj Tajmah	10	15	no

User Enrollment Import

A	B	C	D	E	F
Reg Number	Class_Name	Postfix	Subject_Area_Name	Subject Code	Student_Id
2245	[PHY-1001] Physics & Astronomy Class I	1A	Physic	1001	999-99-9999
1978	[PHY-1002] Physics & Astronomy Class II	2A	Physic	1001	660-22-2221

- **Download your Accudemia Import Sample files**: CSV Import files.zip

If you want to import the data from another application, you can develop your own plugin for ADX. Read the documentation in the Accudemia developers site: ADX Getting Started

Importing Demographic Information

Profile answers do not have to be mapped if you are importing from a CSV file. The reason why it works this way is because you can have several questions across different pages.

Instead, profile answers require specific headers. The format of the header is *@Profile(Page=X, Question=Y)* where *X* represents the number of the page and *Y* represents the number of the question to set.

For example, if your profile questionnaire has 2 pages with 3 questions each, you should have 6 columns with the following headers:

1. @Profile(Page=1, Question=1)
2. @Profile(Page=1, Question=2)
3. @Profile(Page=1, Question=3)
4. @Profile(Page=2, Question=1)
5. @Profile(Page=2, Question=2)
6. @Profile(Page=2, Question=3)

Also, you can use a shorter version or the header by not specifying the words “Page” and “Question”, for example @Profile(1,2) for the page #1, question #2.

If you are editing your CSV file with Microsoft Excel, you might receive an error saying “That function is not valid.”. To solve that problem, you need to add a white space before the '@'.

In multiple choice questions, you have to specify the text of the option you want. For example, if the question has the possible answers “Yes”, “No”, “Maybe”, then you can enter the text “Maybe” in your CSV file.

Once you have the headers corrected on your CSV files you must create the Profile Questionnaire.

Create Profile Questionnaire Step-by-Step

Importing Class Schedules

In order to import class schedule, you can start from your class import file which has Subject Area info and classes data. Then add the following columns:

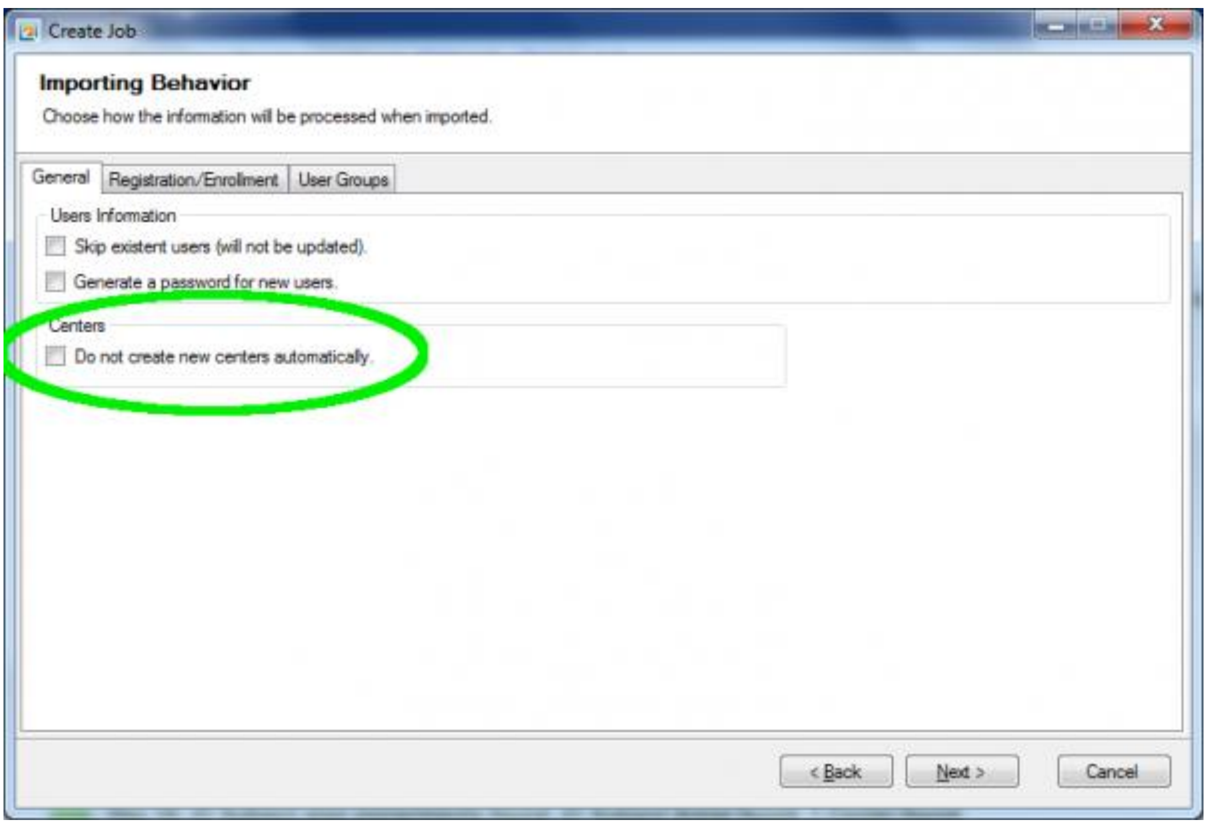
1. Schedule Days: The day of the week when the class is given, either using a 3 letter abbreviation or using the full day name. For example, Mon, Tue, Wed, Thu, Fri, Sat, Sun or Monday, Tuesday, etc. You can multiple days by separating them by a forward slash (/). For example, Mon/Wed/Fri.
2. Start: The start time of the class, in format “h:mm tt”. Valid examples are: 10:00am, 3:15pm.

3. End: The end time of the class, in format “h:mm tt”. Valid examples are: 10:00am, 3:15pm.
4. Classroom: Where the class will be given, it's the name of an existent classroom, such as “A100”, “SCH 5”, etc.

Here's a simple example:

	A	B	C	D	E	F	G	H
1	Subject Area Name	CRN	ClassPostfix	Class Display Name	ScheduleDays	Start	End	Classroom
2	Advanced Computer Science	45688	001	Computer Science 001 (45688)	Mon/Wed/Fri	11:00am	12:30pm	A-101
3	Advanced Emergency Care	84654	002	Emergency Care 002 (84654)	Thu	8:00am	12:30pm	A-101

Note: *When running the* ***Create Job Wizard*** *in ADX and you want the classrooms to be created automatically when you import, ensure that on* ***General tab*** *of the* ***Importing Behavior*** *step the* “Do not Create New Centers/Classrooms automatically” *checkbox is unchecked.*



Options for Importing Enrollment

The setting “Overwrite student’s enrollment” makes the system update the enrollment for the users being imported. To drop the enrollment for all the students, the option “Drop all enrollments for students not being imported.” must also be checked.

Here's what those checks do:

1. If both are NOT checked: the enrollment you import is appended to the one you have in Accudemia. It means that no drops are done at all.
2. If only “Overwrite students enrollment” is checked: The enrollment for the students being imported will be overwritten. That means that if you import students A and B with their enrollment, Accudemia will drop the existent enrollment for those 2 students and set the one you are importing. Other students not being imported (e.g., students C and D) won’t be touched.
3. If both options are checked: Before importing anything, the entire existing enrollment for the current semester, for all the students will be dropped. Once dropped, the new data will be inserted. That means that if you import enrollment for students A and B only, other students such as C and D will end up with no classes associated.

Exporting your Data

Way to Access: Administration> Advanced> Export Purpose: To export your data as a csv file.

The available data to download

- **All Users**: Lists all users in the system, including some useful information such as email, address and phone number.
- **Students**: Lists all students in the system, with detailed information.
- **Tutors**: Lists all tutors in the system, with detailed information.
- **Instructors**: Lists all instructors in the system, with detailed information.
- **Classes**: Lists all classes in the system.
- **Subject Areas**: Lists all subject areas in the system.
- **Student Enrollment**: Gets all students and the classes where they are enrolled.
- **Session Logs**: Lists all session logs registered in the past, including the details of each one of them.
- **All Appointments**: Lists all appointments made in the past and in the future.

Quick Start to AREAS

AREAS stands for Accudemia Referrals & Early Alert System. The purpose of this system is to increase student retention by identifying at-risk students and helping them before it is too late. It can be accessed by simply clicking on the Referrals menu item.

1. Create the Early Warning Form

The system administrator can create an Early Warning form that will be used by college faculty to issue the warnings. This is a web-based form that can be accessed online by instructors or staff. The System Administrator can create the form with whatever questions they like and indicate who will get a copy of the form when it is submitted.

Keep in mind that the above are just example questions and you are free to design the form with whatever questions you see appropriate.

2. Use the Early Warning From

Once the form is created, it can be accessed by instructors or other staff online to issue the early warning and help the student. The instructor or staff member can fill in the form and click "Submit". This will cause two things to happen:

- Email messages with the warning information will be sent out to people you selected when you designed the form.
- The warning information will be added to your database.

3. Take Action

The academic support staff will get the warning message and they will be able to log in and enter follow up information on each warning. The system will track the follow ups and will show the status of each warning as you proceed with your response to the warning.

Accudemia Messaging System

Purpose: This Feature allows the communications with users via e-mail and on line chatting. To customize places where the communication between users can be restricted using settings. Also, this module can restrict the communication between students.

Options to activate Messaging Accudemia System
Way to access: **Control Panel** > **User Accounts** > **Communication**

- **Enable messaging**: Enables general Messaging. When this option is enabled, a new tool bar is displayed with two icons. Inbox , New Message.
- **Enable chat**: Enables general Online Chat. When this option is enabled, a new tool bar is displayed with Contacts button.
- **Enable communication in sign in stations**: Enables the communication through Online Chat and Emails if users logs in at the Sign-In Stations.
- **Enable communication between students**: Enables the communication between students. This option allows you to show or hide users with student role to avoid the communication between them.

New Messaging

This Module allows send messages between users. This module displays a "New Message" pop up window to create a new message. To create the message select the user's full name , type the **Subject** message and your message, then send it. Accudemia has the availability to send to your email account a warning mail when a message has been sent to you.

Inbox

It leads you to your Accudemia Message Inbox.

Accudemia Chat

Click the **Contact** button to see your contacts .

To add new contacts, click over **Add Contacts** at the top down of the application. An **Add Contact** pop up window will display the option to search Accudemia users. Click over **Add** to send your invitation to your selected contact user.

Important! *For security reasons and our policy this Search option only displays Full Name*

Intake System

Purpose: Create a waiting line in your center and manage when people can get into the session.
Way to Access: **Center Attendance** > **Intake System**
Security: This feature is only enabled for administrators with the Intake System role.

Description:

In order to enable a waiting line, click on a center from the list. It will be enabled immediately and you will be taken to its management screen. You can disable the waiting line and go back to the normal behavior by clicking on Disable Waiting Line on the toolbar. If you are in a sign-in station, you can click on Administration on the bottom right corner of the screen, and then pick Intake System.

In the waiting line management screen, select the students you want and sign them in, or remove them from the line. To select a specific tutor, pick a student and a tutor, then click Sign In in the toolbar. A window will pop up where you can then decide which tutor you want to sign-in the student with.

Managing a Waiting Line

Tools

- **Sign in Students:** To sign in the students in line. Administrator is able to choose to sign-in using either the student selected tutor or any other available.
- **Remove from line:** To remove the student from the line.
- **Disable Waiting Line:** To put the center in normal mode. All students will be automatically signed-in once they arrive to the center and enter their IDs.
  Note: Waiting students must be removed first.

Tables

- **Students Waiting:** Displays a list with students waiting for the selected tutor. It also displays the time that the student is waiting for.
- **Tutors In:** Displays the tutors who are in the center at the moment.
- **Students In:** Displays the students in the center.

Prompt Student Call Notes: Enables/disables a prompt to the students when they sign-in. This can be helpful if students have to be called at the moment of sign-in.