AccuTraining Quick Start Guide

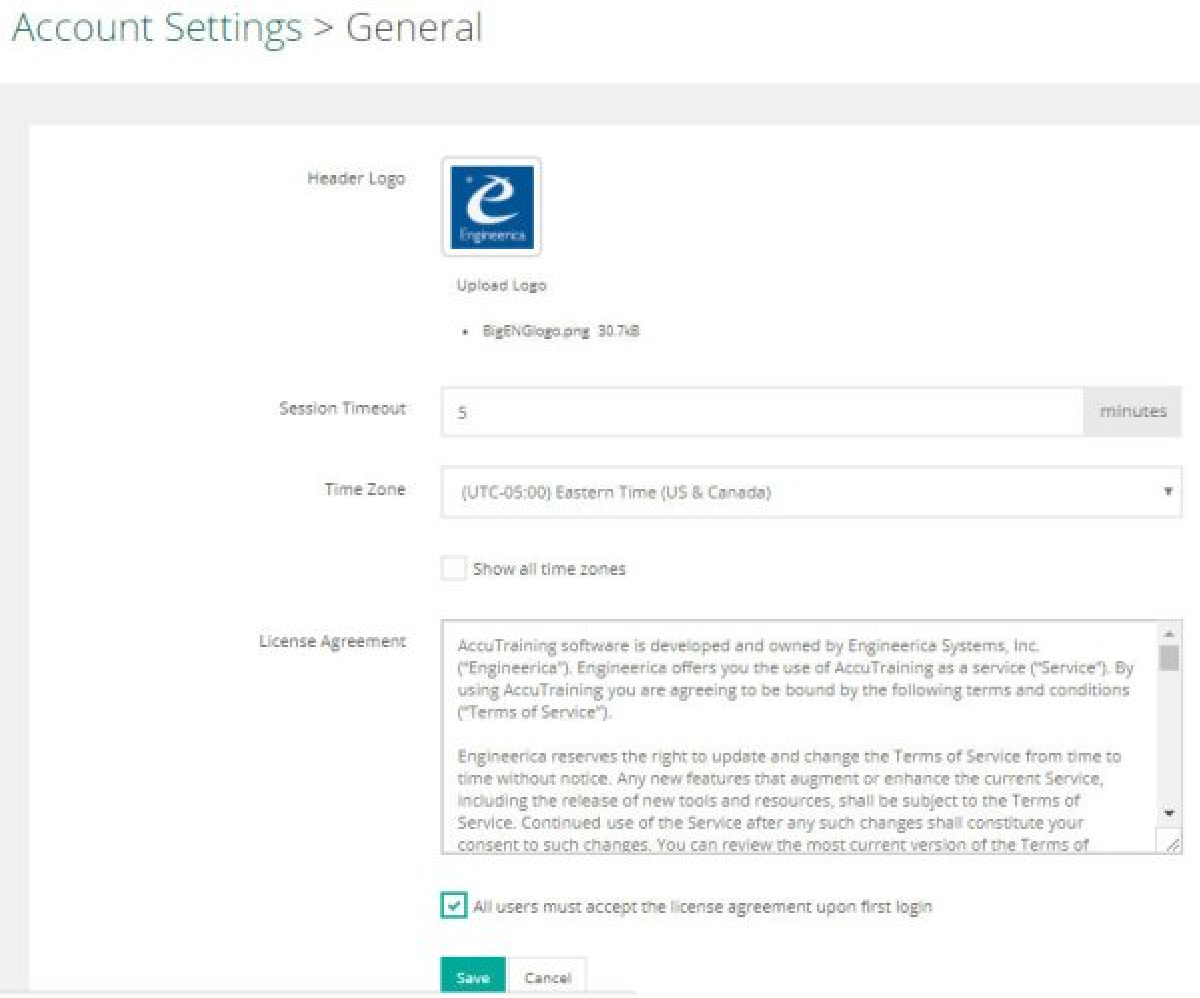
Don't have time to read it online then download our AccuTraining Quick Start Guide (PDF).

Getting Started:

This guide is available here to help you get your AccuTraining account setup and running very quickly and efficiently.

1. Adjust your Account Settings

Location: Advanced Options > Settings

1. Update the **General** account settings, such as the time-zone, Session Timeout, etc.


    - **Account Logo** - This can be the company logo or even the training series logo which will

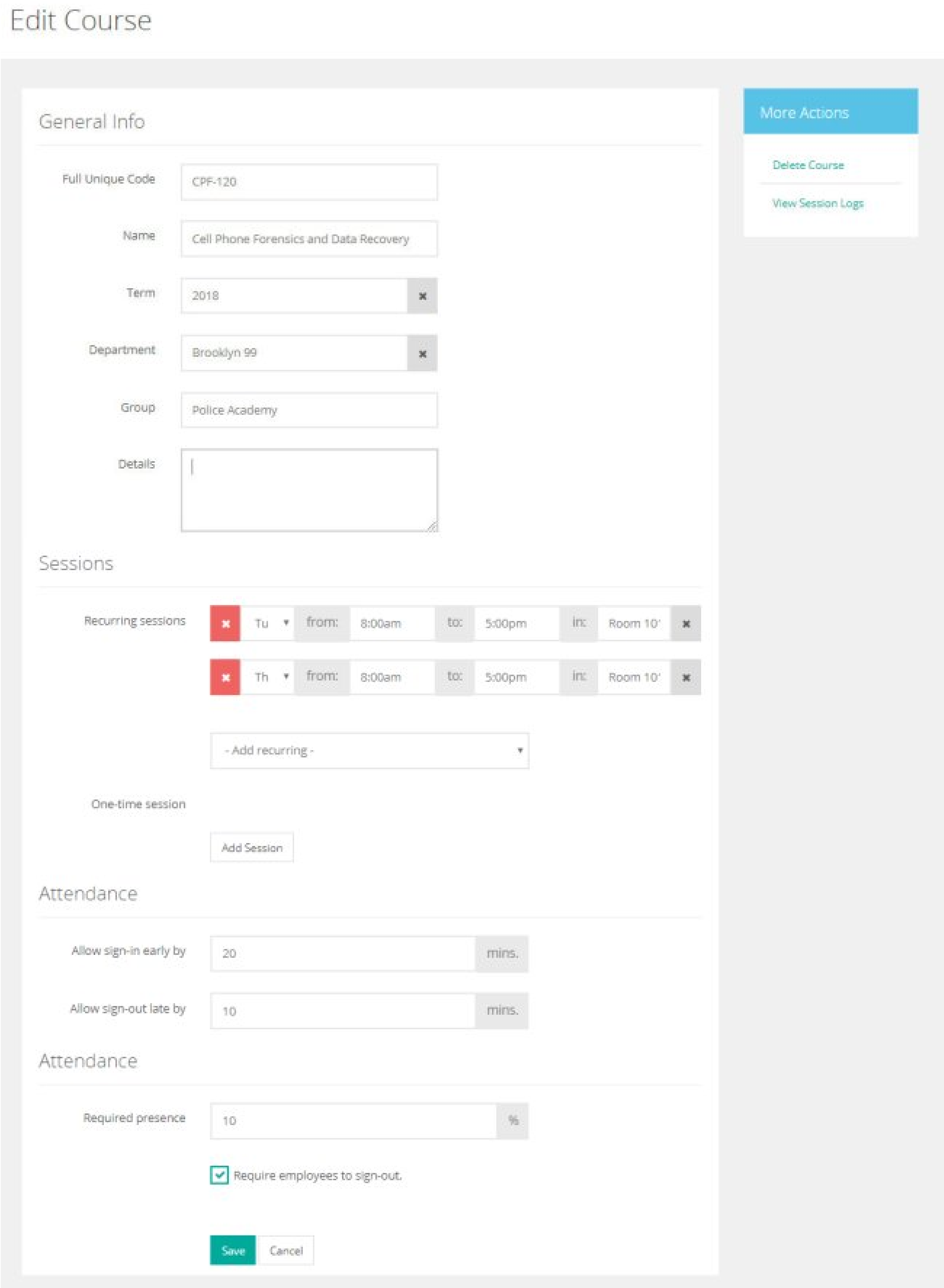
appear on the **Badges** and **Certificates**by default.
  - **Time-zone** This is a very important setting and is there so AccuTraining can tell the Apple devices what **Timezone** the training sessions will take place. By default only the 4 continental U.S. time-zones show up but you can check the box to show all time-zones if you are doing the training outside of the U.S. time-zones.
  - **License Agreement (optional)** This section of AccuTraining will allow you to enter a user agreement if needed when the **Employees** login.

2. Enter or import the Training Courses

Entering Training Courses Manually

Location: General > Training Courses

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



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

General Info

- **Full Unique Code (Required)** - This is a unique code of the **Training Course** used to identify this specific class.
- **Name (Required)** - This is the title of the **Training Course** that you will see throughout the **AccuTraining** website when selecting the **Training Course**.
- **Term** - Used as a reporting period to be selected when running reports and if using recurring sessions it determines when the start and end dates are of these recurring sessions.
- **Department** - Used to group **Training Courses**. This assigns a **Department** (which has to be created previously) to which the **Training Course** belongs to in **AccuTraining**. It can be used to group them in the reports or plans.
- **Group** - Used to group **Training Courses** for a **Training Plan** or Reports. If you create a group name that you tag each course with it will use it to group them in the reports or plans.
- **Details** - this is the description of the **Training Course** which can be used for any notes about the **Training Course**.

Sessions

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

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

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

Attendance Options

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

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

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

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

Training Courses.

Importing Training Courses

Location: Advanced Options > Import

Valid headers:

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

Explanation:

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

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

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

The **Department** is optional.

The **Schedule** field needs to have the following format: <days_of_week **or** meeting_date> <start>-<end> <location> Where:

- <days_of_week> is the list of days of the week when the training Course is given, without spaces. For example: MWF means that the training Course is given every Monday, Wednesday and Friday. The days must be specified using the following letters: M=Monday, T=Tuesday, W=Wednesday, R=Thursday, F=Friday, S=Saturday, U=Sunday.
- <meeting_date> is a date in YYYYMMDD format that specifies a one-time training Course. For example: 20131007 specifies that the training Course is on October 7th, 2013.
- <start> is the start time of the training Course, in military time. For example 900 or 0900 refers to 9am, 1730 refers to 5:30pm.
- <end> is the end time of the training Course, in military time. Please note that it has to be separated from the start time using a hypen.
- <location> is the name of the location where it's given.

- Full example (Mondays and Thursdays, from 9am to 10:30am in the location A-101):
  MR 900-1030 A-101

- Full example (July 29th, 2013 from 3pm to 5:45pm in the location A-101):
  20130729 1500-1745 A-101

- You can specify multiple times or locations separating them by a slash (/), for example: MWF 900-1030 A-101 / TR 1400-1530 A-201 / 20130815 1100-1230 A-203

Example:

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

Download the example file (.csv)

3. Enter or import the Employees

Creating Employees Manually

Location: Users > Employees and Users

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

Complete the following info:

User Info

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

Security

- **Role** - Select a from the following options:
  1. **Administrator** - This is a person that will have full access to AccuTraining to manage and maintain the software.
  2. **Operator** - This is a person that will have limited access to AccuTraining to manage and maintain the software and will be primarily used to scan people into the **Training**

Courses using the Apple devices.
3. **Employee** - This is a person that will have no access to AccuTraining to manage and maintain the software but will be required to interact with the software by following their assigned **Training Plans** and attending their required **Training Courses**.

Photo

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

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

Importing Employees

Location: Advanced Options > Import

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

Valid headers:

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

Explanation:

The **Email** is used to uniquely identify the user, it must be unique across all the users in the system. It also allows users to login, to reset their password, to receive messages and notifications and a lot more things. The email has to be unique across all the users too.

The **FirstName** and **LastName** are required. It's usually displayed in the format First Last. You can also optionally specify the **MiddleInitial**

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

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

Example:

FirstName	MiddleInitial	LastName	Email	CardNumber	Active
Winnie	T	Pooh	wpooh@accuclass.com	1089	Yes

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

Download the example file (.CSV)

4. Design and print your Badges

Location: Workshops > Badges

Create Badge Template

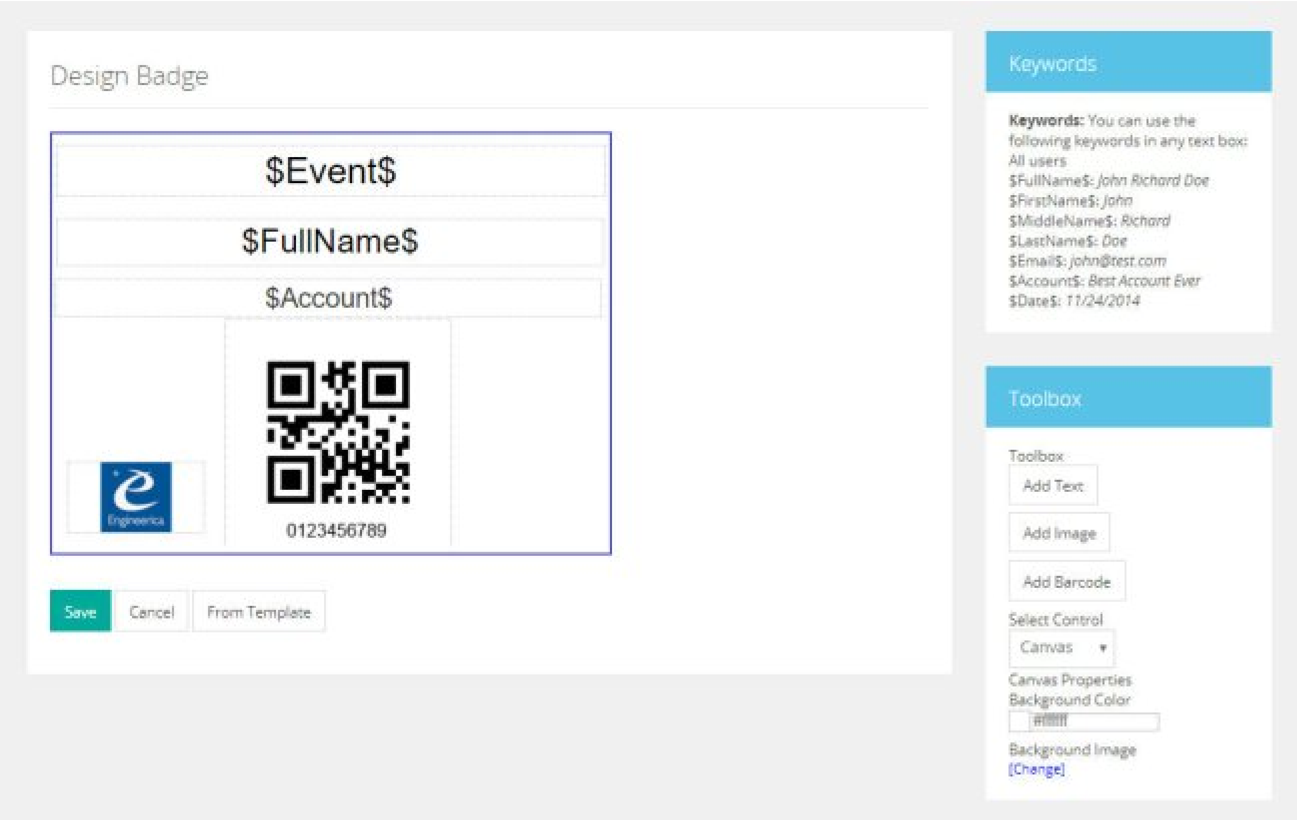
Location: Workshops > Badges > Templates

To get started simply click the **Create Badge Template** button at the top of the **Badge Templates** screen. Then complete the following steps:

1. Give the **Badge Template** a **Name** that will show up when seeing them in the **Badge Template** list.
2. Give the **Badge Template** a brief **Description** of the group of Employees this badge is designed for so you will know when seeing them in the **Badge Template** screen.
3. Now either **Save** this information only by clicking the **Save** button OR **Save and Design** this template by clicking the **Save and Design** button.

Design

This is where you can fully customize your Users badges or just choose from several preset templates.



On this screen you can design the badges for your Users. Using the following sections:

Toolbox

- **Add Text:** Create a box where you can enter text.
- **Add Image:** To add images to canvas the certificate.
- **Add Barcode:** This allows you to add either QR or 39 barcodes to your badges.
- **Select Control** This is used to select a part of the badge you want to edit. A dropdown list shows all the elements that make up your badge.
- **Canvas Properties**
    - **Background Color:** Select the color you want your background. Click on the white box, and it will display a picture with all the colors you can change it.
    - **Background Image**
        - **View Image:** It will open a new window showing the image of the badge created.
        - **Change:** You can upload an image that resides on your computer.
        - **None:** Removes any background image upload.

Keywords

You can use the following keywords in any text box:

All Users Info:

- **$FullName$** Displays the full name of the User.
- **$FirstName$:** Displays the first name of the User.
- **$MiddleName$:** Displays the middle name of the User.
- **$LastName$:** Displays the last name of the User.

- **$Email$:** Displays the email of the User.
- **$Account$** Displays the name of the Account.
- **$Date$** Displays the date of the Training.

Users with attendance

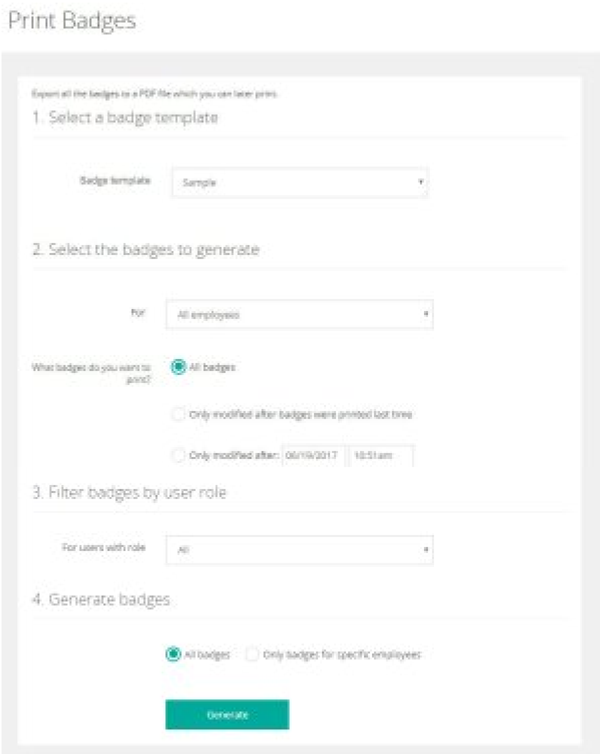
- **$Events$:** This displays the **Training Courses** the Employee is registered to.

Print

Location: Workshops > Badges > Print

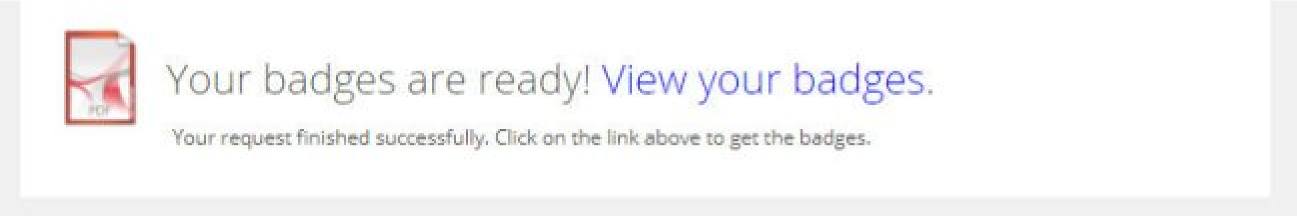
This section allows you to print your **Badges** you have designed in the AccuTraining software. You have many options as far as what **User Role**, which **Badge Template**, and even for only certain individuals or all of the **Users** that you want to print the **Badges**.

As an **Administrator**, you may want to directly download the **Badges** to print out and then hand out to the **Employees**.



1. First select a **Badge Template**.
2. Select whether to print the **Badges** for all or those only with attendance.
3. Now set what **Badges** you want to print.
    - **All badges**
    - **Only modified after badges were printed last time**
    - **Only modified after: (MM/DD/YYYY H:MM AM/PM)**
4. Now filter based on the **User Role**. This can either be a default **User Role** (Admin, Operator, or Employee).
5. Now select whether to print only individual **Badges** or all **Badges** and then click the **Generate** button. Wait until AccuTraining generates your Badges and the bottom section of the screen shows the message ***Your badges are ready, click on View badges to download.***

A confirmation screen will show at the bottom of the screen and click the **View your badges** to print them out.



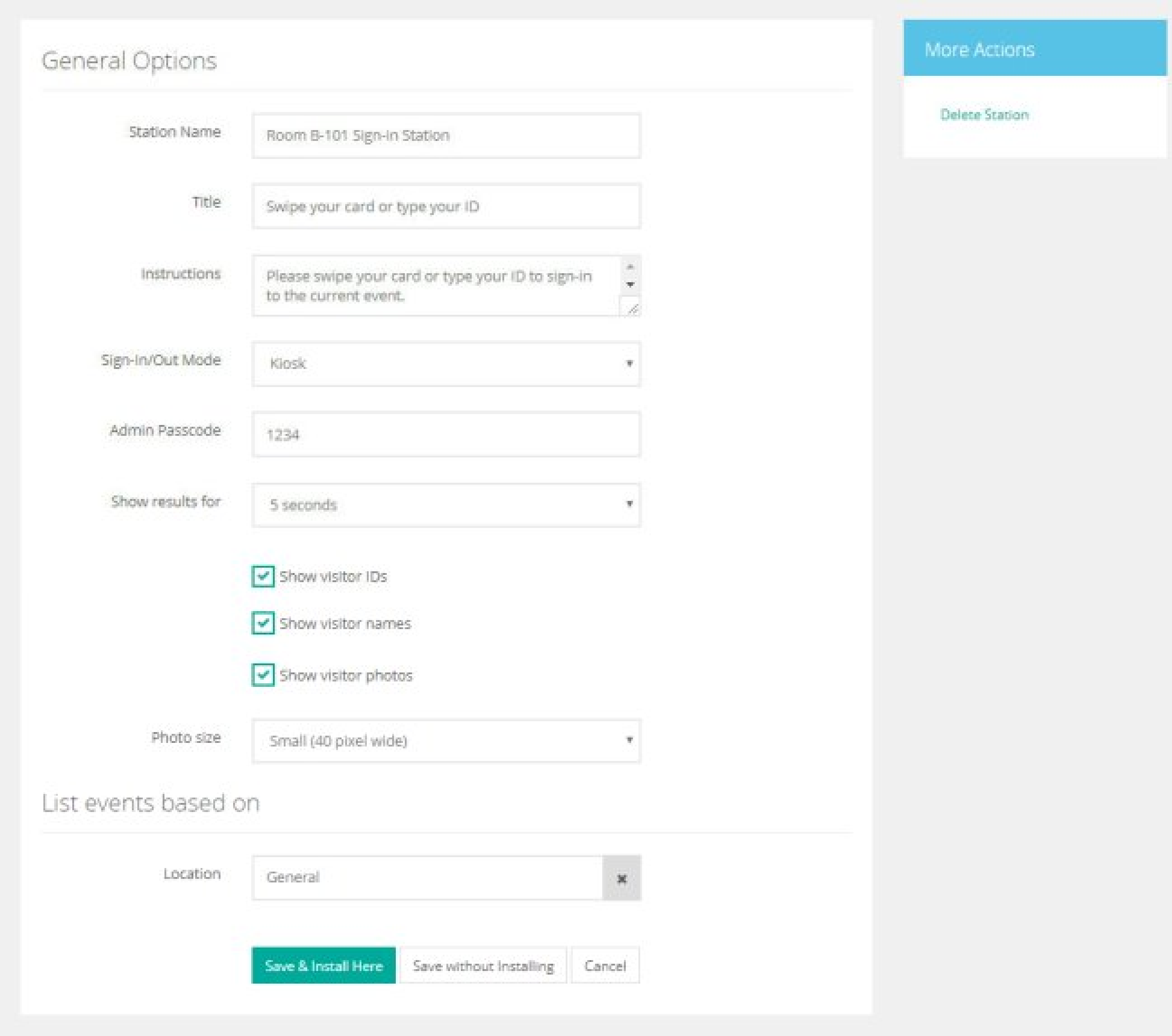
The Avery part number for badges that you need is is #5392 and uses template number #74541. They are 3” x 4” badge inserts (6 to a page) and can be found at Avery.com by clicking here or at retailers carrying Avery products.

5. Setup Sign-in Stations OR use Apple AccuTraining App

Create a Sign-In Station

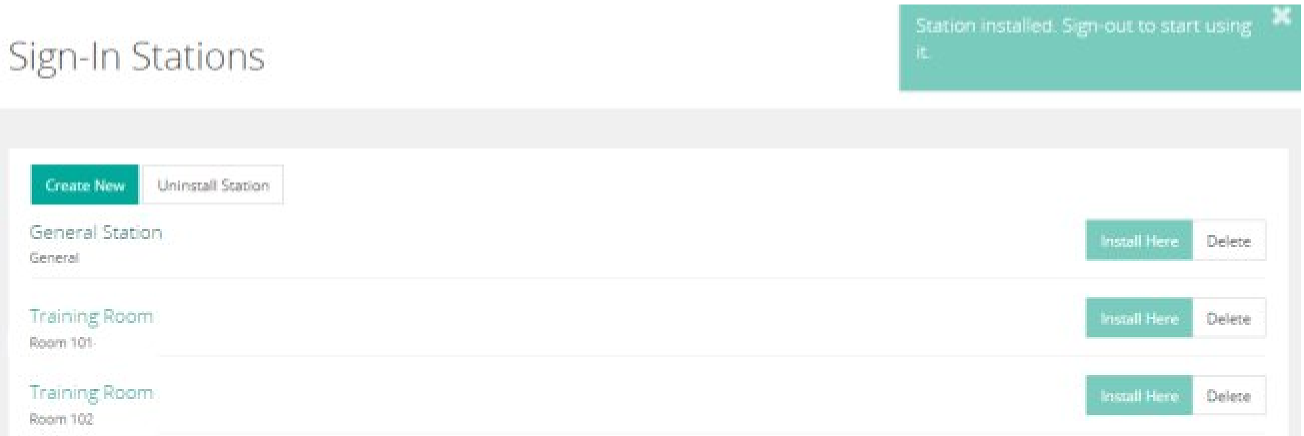
Location: Visits > Sign-in Stations

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



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

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



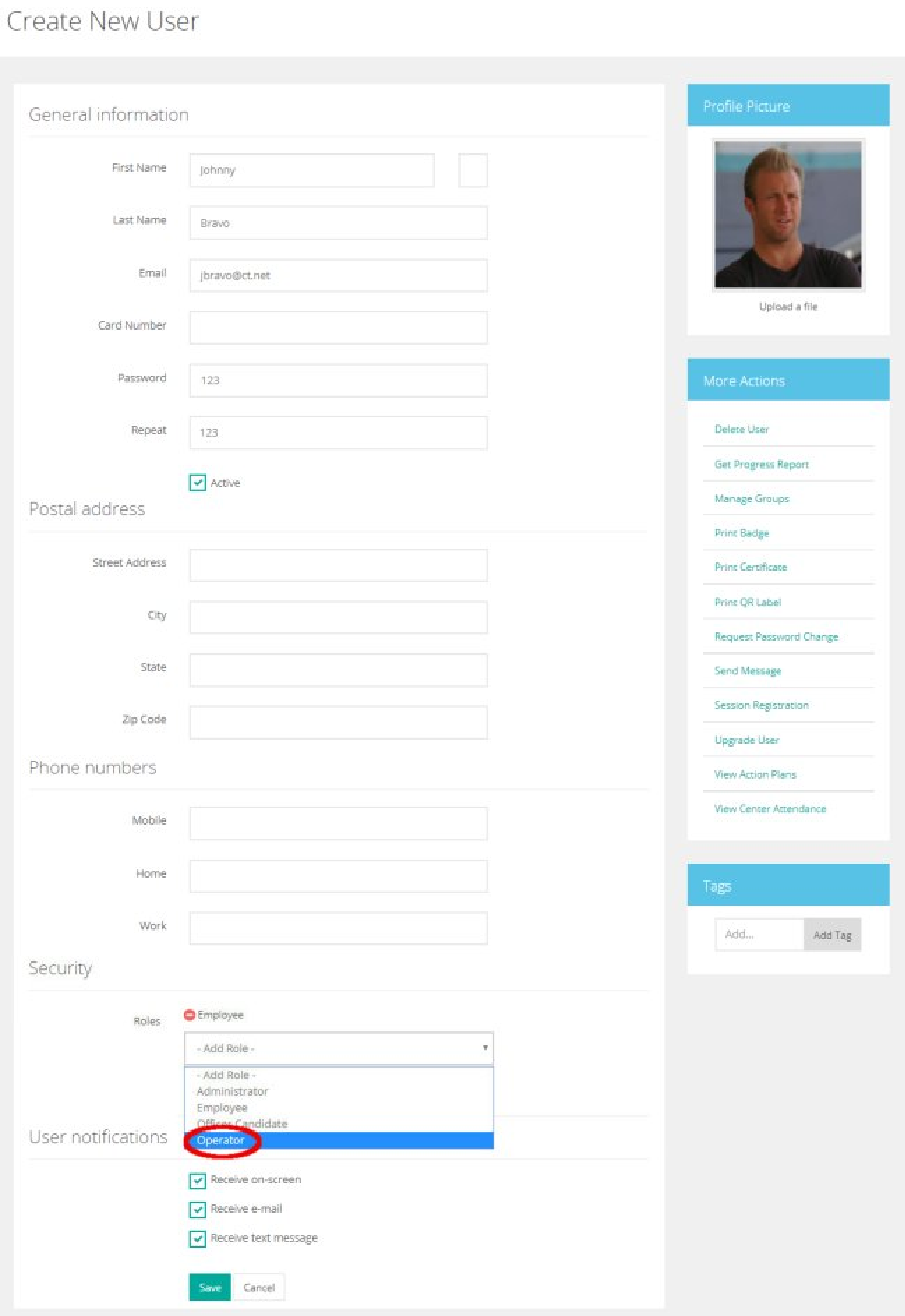
Now simply log-out of AccuTraining.net to switch to **Sign-in Station** mode.

Using the Apple AccuTraining App

Create Operators to handle the devices

Location: Users > Employees and Users

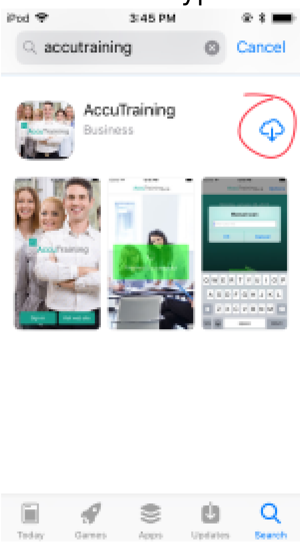
Follow the process listed in Step 3 of this guide to create an **Employee** except when selecting their **User Role** in the **Security** section set these people you intend to handle the devices **Operators**.

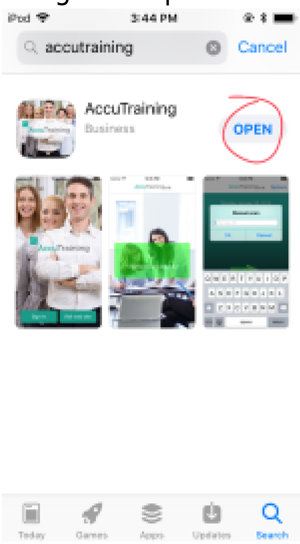

Create New User
General information
First Name
Johnny
Last Name
Bravo
Email
jbravo@ct.net
Card Number
Password
123
Repeat
123
Active
Postal address
Street Address
City
State
Zip Code
Phone numbers
Mobile
Home
Work
Security
Roles
Employee
- Add Role -
- Add Role -
Administrator
Employee
Officer Candidate
Operator
User notifications
Receive on-screen
Receive e-mail
Receive text message
Save
Cancel
Profile Picture
Upload a file
More Actions
Delete User
Get Progress Report
Manage Groups
Print Badge
Print Certificate
Print QR Label
Request Password Change
Send Message
Session Registration
Upgrade User
View Action Plans
View Center Attendance
Tags
Add...
Add Tag

Setup the Apple AccuTraining App on the devices

First, you need to download the AccuTraining App from the App Store on your Apple device. It's a free application so no need to worry about additional fees. Here is a link to the AccuTraining app store webpage.

1. Tap the App Store icon.
    - 

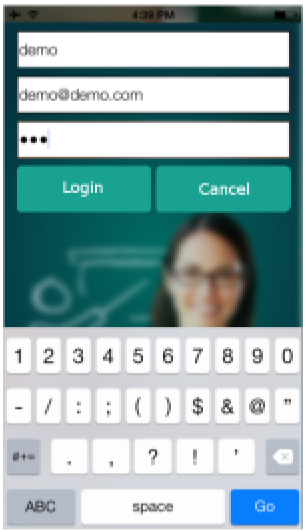
2. In the Search field type AccuTraining and tap search. Tap the cloud icon to download/install.
    - 

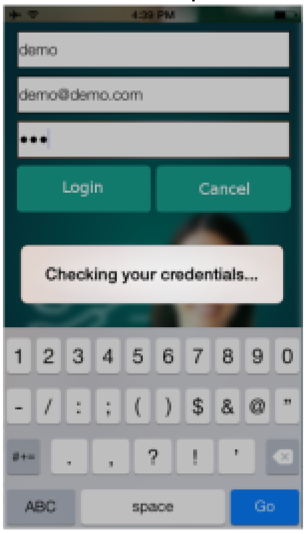
→ 

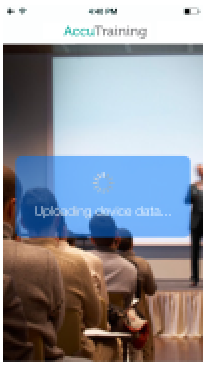
3. Now click open or from the home screen click on the AccuTraining icon and then tap the **Sign-in** Button (left-side)

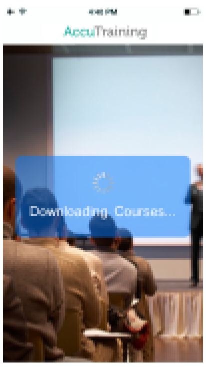
  - 

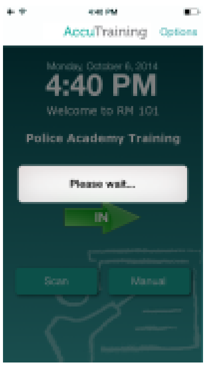
→ 

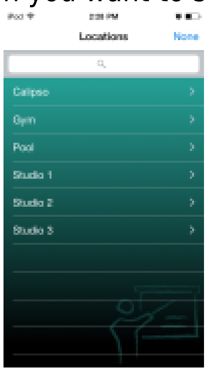
4. Enter in your AccuTraining account login (provided) and then tap **Login** button (left-side)
  - **Domain:** This is the domain given for the AccuTraining account.
  - **E-mail:** This is your e-mail address.
  - **Password:** This is the password either provided or you created.
  - 

→ 

5. Done! The device will sync information and ask what location you want to start tracking.
  - 

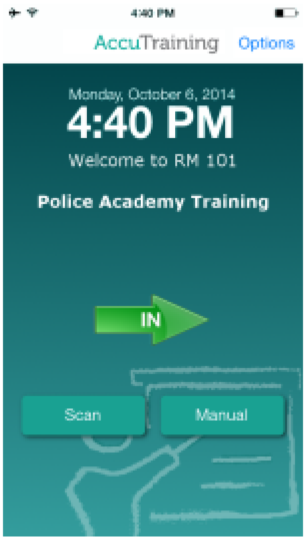
→ 

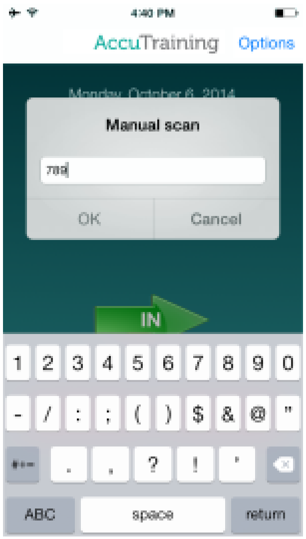
→ 

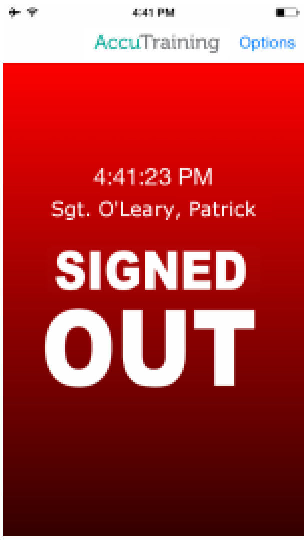
→ 

Track Employees Manually with App

1. After logging into AccuTraining you will see the Sign-in/Sign-out screen. If you want to sign-in someone the arrow will be green simply tap the arrow to turn it red to sign-out someone. Next click the **Manual** button if you want to enter the Employee's number manually.

○ 

→ 

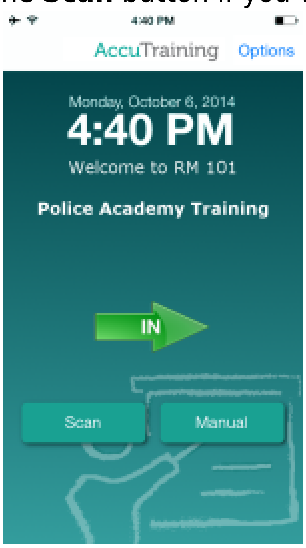
→ 

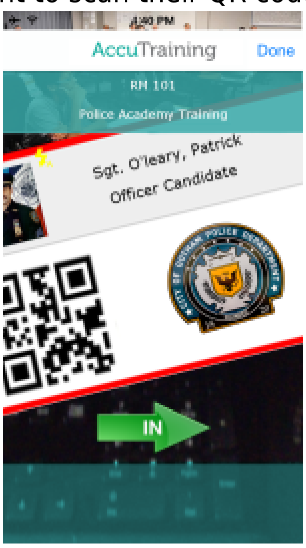
2. Once you tap the Employees ID in your Apple device and tap **OK** it will emit a short high pitched “Beep-beep!” and you will see this green “Signed Out” screen briefly.

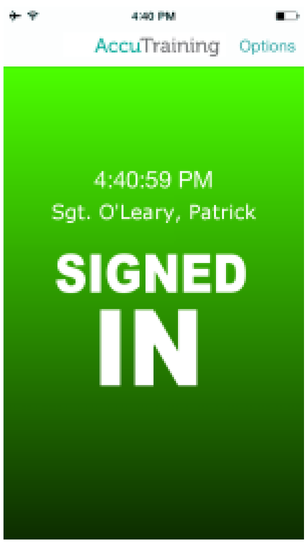
If you hear a low pitched “Deerrrp!” sound emitted from the device you have encountered a misread and simply scan the barcode or QR code again.

Using a QR barcode with the device’s Camera with App

1. After logging into AccuTraining you will see the Sign-in/Sign-out screen. If you want to sign-in someone the arrow will be green simply tap the arrow to turn it red to sign-out someone. Next click the **Scan** button if you want to scan their QR codes or barcodes.

○ 

→ 

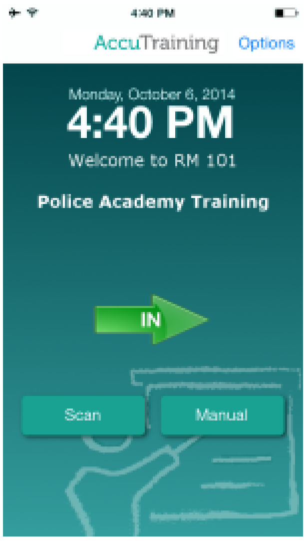
→ 

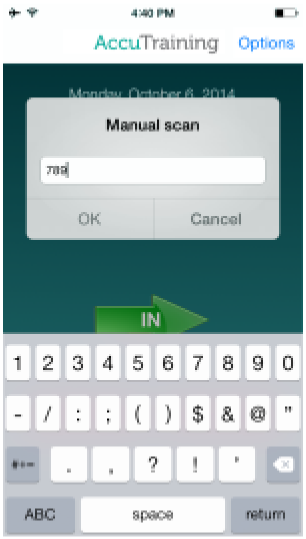
2. Once you scan the barcode or QR code your Apple device will emit a short high pitched “Beep-beep!” and you will see this green “Signed In” screen briefly.

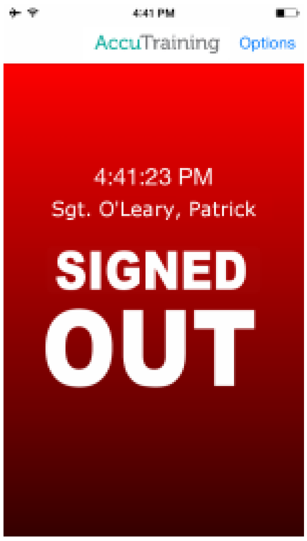
If you hear a low pitched “Deerrrp!” sound emitted from the device you have encountered a misread and simply scan the barcode or QR code again.

Using ID Cards with a Magnetic Strip Reader with App

1. After logging into AccuTraining you will see the Sign-in/Sign-out screen. If you want to sign-in someone the arrow will be green simply tap the arrow to turn it red to sign-out someone. Next click the **Manual** button so you can swipe the Employee's card.

- 

→ 

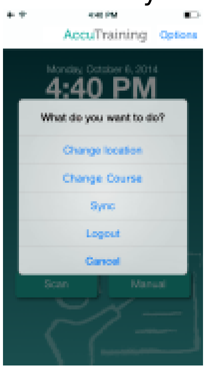
→ 

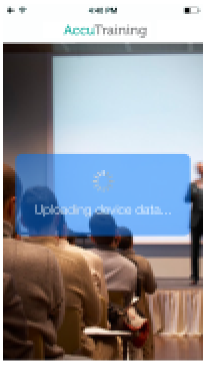
2. Once you swipe the Employees ID in your Apple device it will emit a short high pitched “Beep-beep!” and you will see this green “Signed Out” screen briefly.

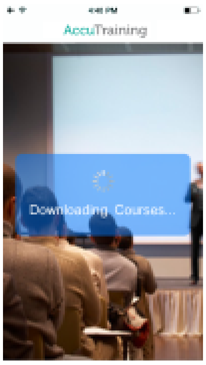
If you hear a low pitched “Deerrrp!” sound emitted from the device you have encountered a misread and simply scan the barcode or QR code again.

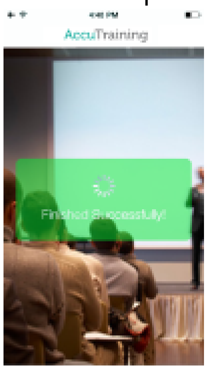
Whichever method you choose… Sync the Apple device.

Once you have collected all the Employee's swipes for that session you can upload/sync the data to AccuTraining out on the cloud so admins can see the attendance through the website.

1. First click the “Options” in the top right corner of the AccuTraining app.
2. Next click the “Sync” option and it should take a minute or two to complete with a confirmation.
   - 

→ 

→ 

→ 

Done! Now you are ready to start tracking Training Courses in AccuTraining!

Optional Setup:

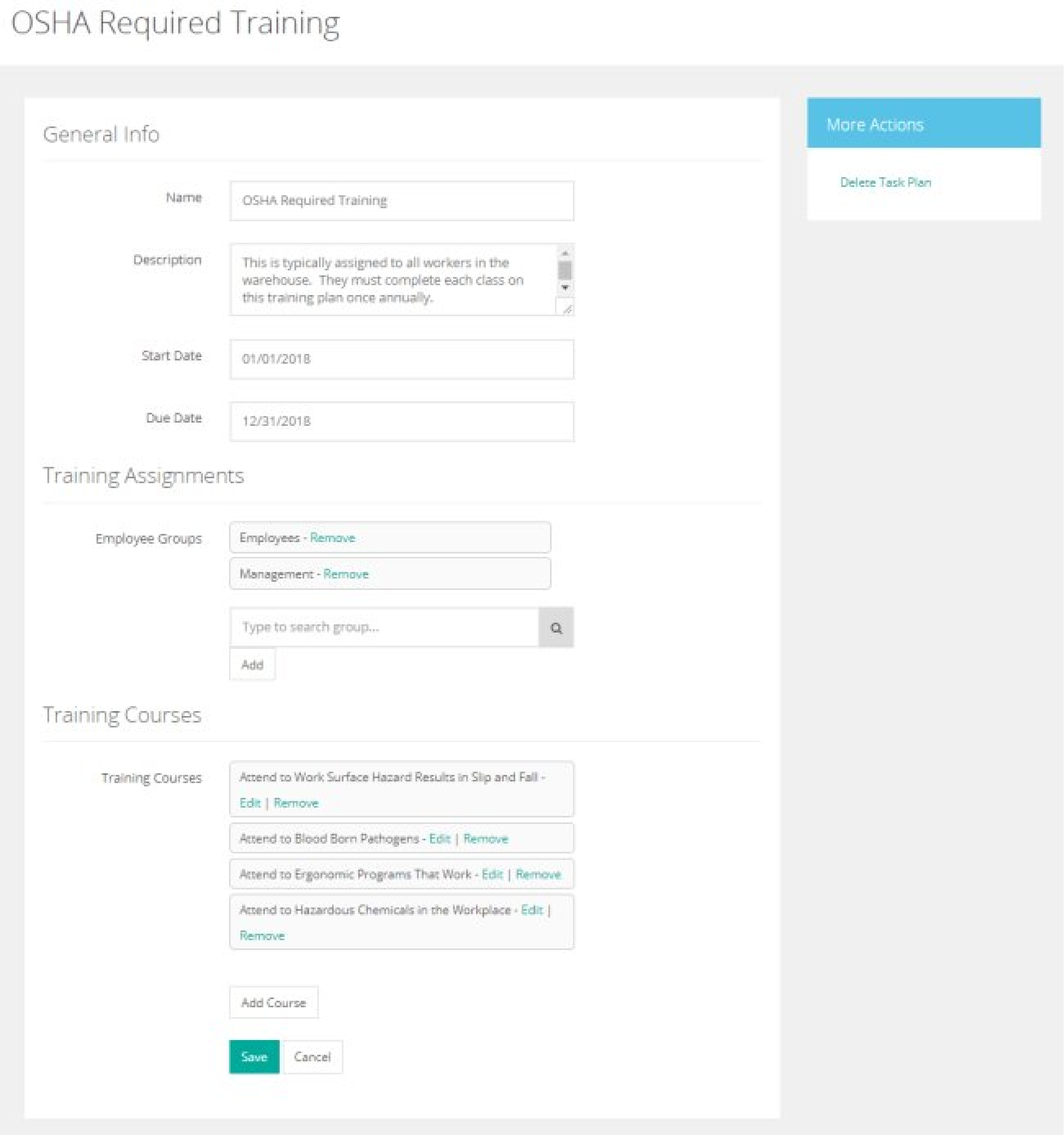
These are additional options that may help improve the tracking and management of the Training Courses.

6. Setup Training Plans

Create Training Plans

Location: General > Training Plans

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



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

General Info

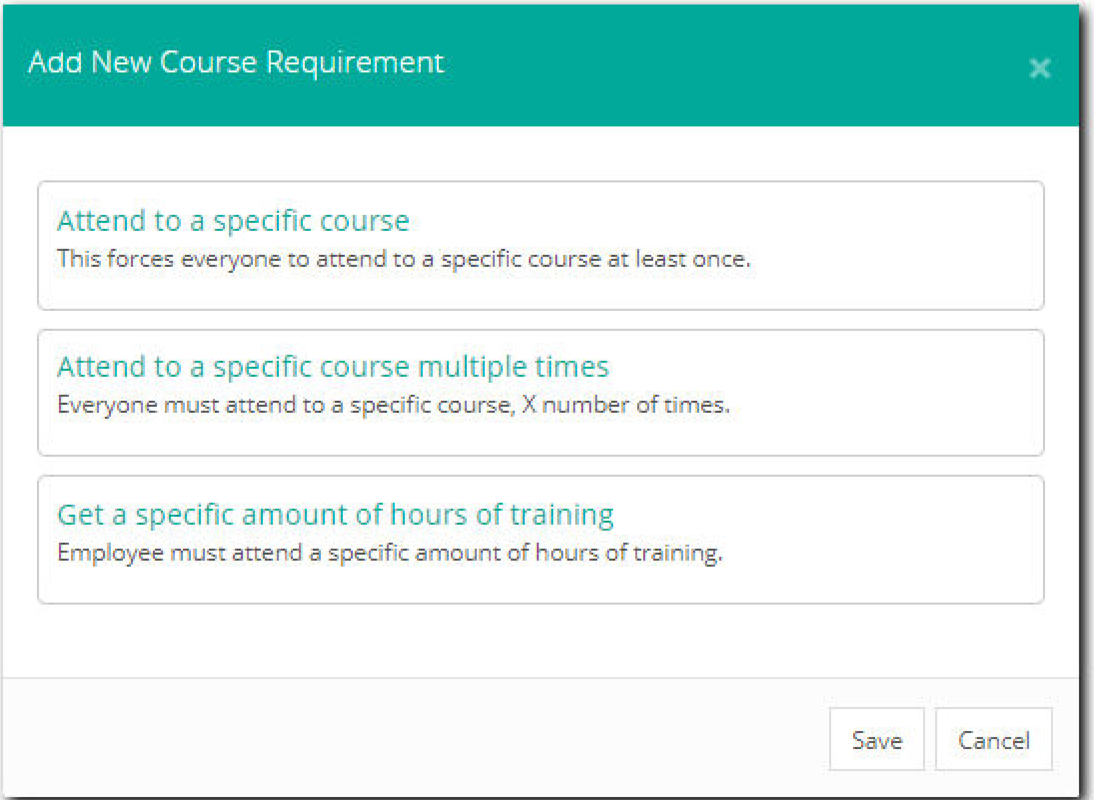
- **Name (Required)** - This is the title of the **Training Plan** that you will see throughout the **AccuTraining** website when selecting the **Training Plan**.

- **Description** - this is the description of the **Training Plan**.
- **Start Date** - this is the starting date of the **Training Plan**.
- **Due Date** - this is the due date of the **Training Plan**.

Training Assignments

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

Training Courses

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

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

    3. **Set a total amount of hours needed to complete.** - Fill-in the number of hours required.
  3. Once you set the information click the **Save** button at the bottom.

7. Register Employees for Sessions

Session Registration

Location: General > Training Courses > Session Registration

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

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

1. Simply type at least the first 3 letters of the **Training Course** in the **Select Course** field and then select the **Training Course** in the drop-down list.
2. Optionally select a **Session Date** using the Calendar that appears when you click the **Session Date** field.
3. Finally click the **View Sessions** button and **AccuTraining** will display the available **Training Course** sessions.
4. From the results displayed simply click the **View Registration** link on the right side of the **Training Course** session you wish to modify the registration.
5. Here you can add **Employees** to the **Registered Users** section by typing their names in the search field, selecting them in the drop-down menu, and then by clicking the **Add Employe**e button.
6. Once done if you have more **Training Course** sessions to modify you can click the **Change Session** button to start again with another **Training Course** session.

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

8. Design Certificates so ready when training is complete!

Location: Workshops > Certificates

Create Certificate Template

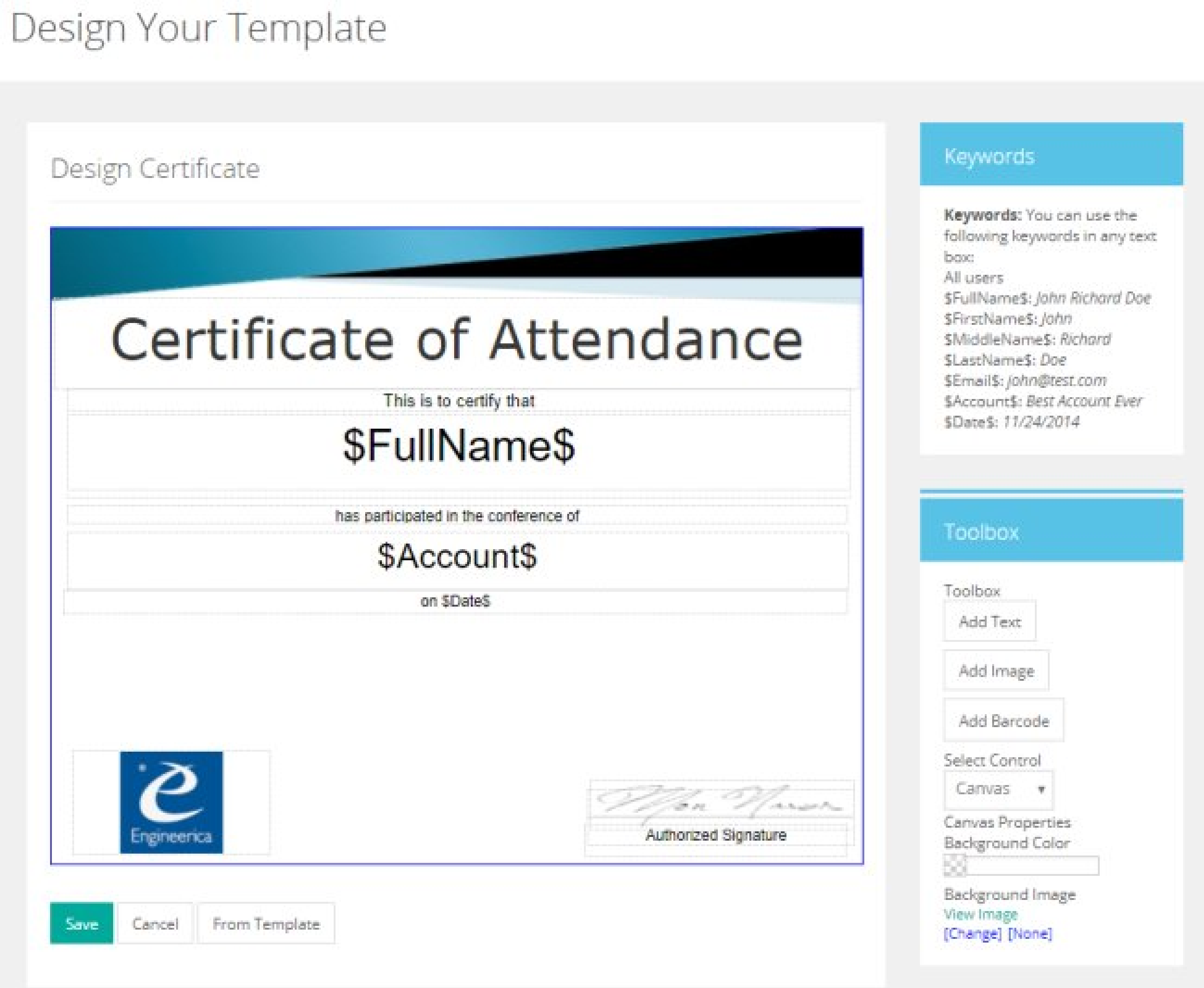
Location: Workshops > Certificates > Templates

To get started simply click the **Create Certificate Template** button at the top of the **Certificate Templates** screen. Then complete the following steps:

1. Give the **Certificate Template** a **Name** that will show up when seeing them in the **Certificate Template** list.
2. Give the **Certificate Template** a brief **Description** of the group of Employees or reason this Certificate is designed for so you will know when seeing them in the **Certificate Template** screen.
3. Now either **Save** this information only by clicking the **Save** button OR **Save and Design** this template by clicking the **Save and Design** button.

Design

This is where you can fully customize your Users Certificates or just choose from several preset templates.



On this screen you can design the Certificates for your Users. Using the following sections:

Toolbox

- **Add Text:** Create a box where you can enter text.
- **Add Image:** To add images to canvas the certificate.
- **Add Barcode:** This allows you to add either QR or 39 barcodes to your Certificates.
- **Select Control** This is used to select a part of the Certificate you want to edit. A dropdown list shows all the elements that make up your Certificate.
- **Canvas Properties**
  - **Background Color:** Select the color you want your background. Click on the white box, and it will display a picture with all the colors you can change it.
  - **Background Image**
    - **View Image:** It will open a new window showing the image of the Certificate created.
      - **Change:** You can upload an image that resides on your computer.

- **None:** Removes any background image upload.

Keywords

You can use the following keywords in any text box:

All Users Info:

- **$FullName$** Displays the full name of the User.
- **$FirstName$:** Displays the first name of the User.
- **$MiddleName$:** Displays the middle name of the User.
- **$LastName$:** Displays the last name of the User.
- **$Email$:** Displays the email of the User.
- **$Account$** Displays the name of the Account.
- **$Date$** Displays the date of the Training.

Users with attendance

- **$Events$:** This displays the **Training Courses** the Employee is registered to.

That's it! Now the Certificates will be ready when you need them printed!

Need more help? Visit the Full Manual