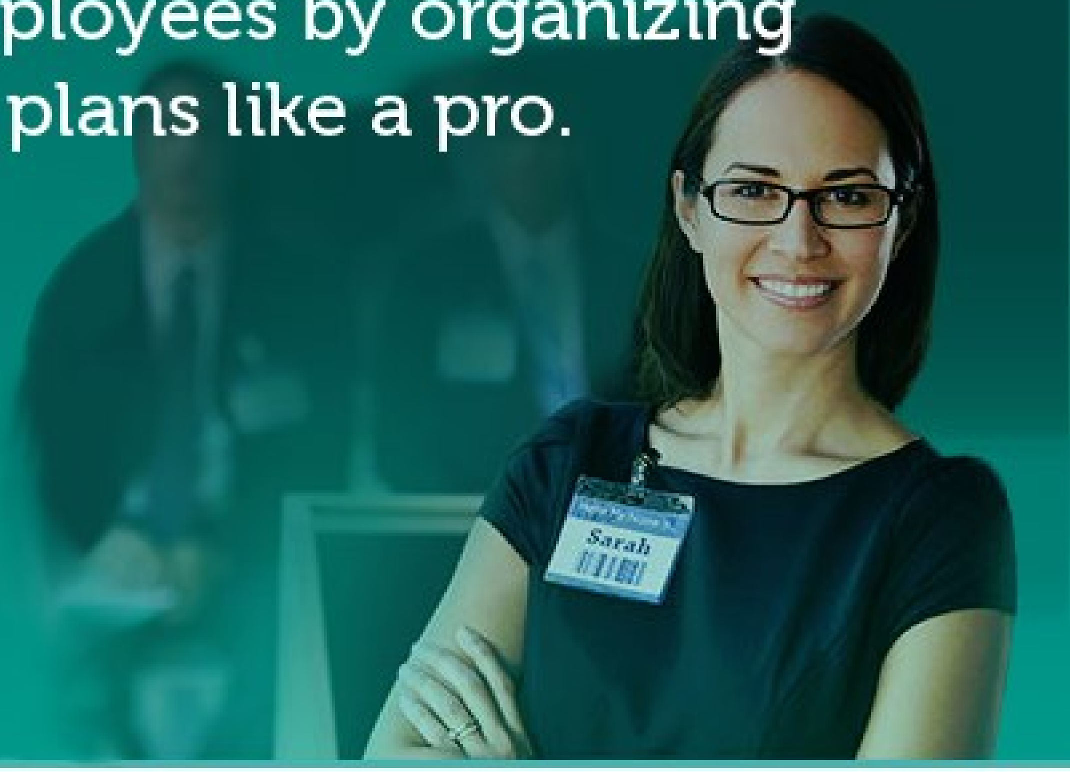
AccuTraining

# User Manual

Empower employees by organizing your training plans like a pro.



Engineerica

www.engineerica.com

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## Introduction

We designed **AccuTraining** to give you an easy-to-use tool for tracking your training classes and employees' training progress. With **AccuTraining**, you can:

- Add training courses and enter the dates of each session.
- Optionally create training plans and add required courses. Assign plans to employees.
- Record training attendance by either:
    - Using a **sign-in computer** to run our cloud-based sign-in software: You can simply type in the employee ID number on the keyboard to sign them in. For an even quicker sign-in, use a barcode reader, a magnetic strip reader, or even an RFID reader to quickly swipe the employee's badge and record their attendance. Note: this option requires an internet connection.
    - Use an **Apple device** (iPod touch, iPad, or iPhone) to record the attendance. Our iOS app will allow you to use the Apple device camera to read a barcode on the employee's badge and record their attendance! We also offer a magnetic stripe reader that attaches to your Apple device to allow you to swipe the magnetic strip on employee badges. Note: this option does not require a live internet connection since the attendance data can be saved on the Apple device for a latter upload.
- Don't have employee badges? No problem! Simply use **AccuTraining** to create employee badges, training badges, or just a QR code that can be used to record the sign-ins. You can even email the badges to the employees from **AccuTraining** so they can print them before training!
- Optionally upload employees' photos and show them when employees sign in on the sign-in station.
- Check out what training sessions are employees signed into at any time via the **Who's In** screen.
- Get a random pick of one or more attendees. This is useful for randomly asking questions, door prizes, etc.
- Optionally have employees **sign-out** in addition to signing in. Useful to make sure employees were present until the end of the training session.
- Optionally register employees to training session.
- Get the **training reports** you need including:

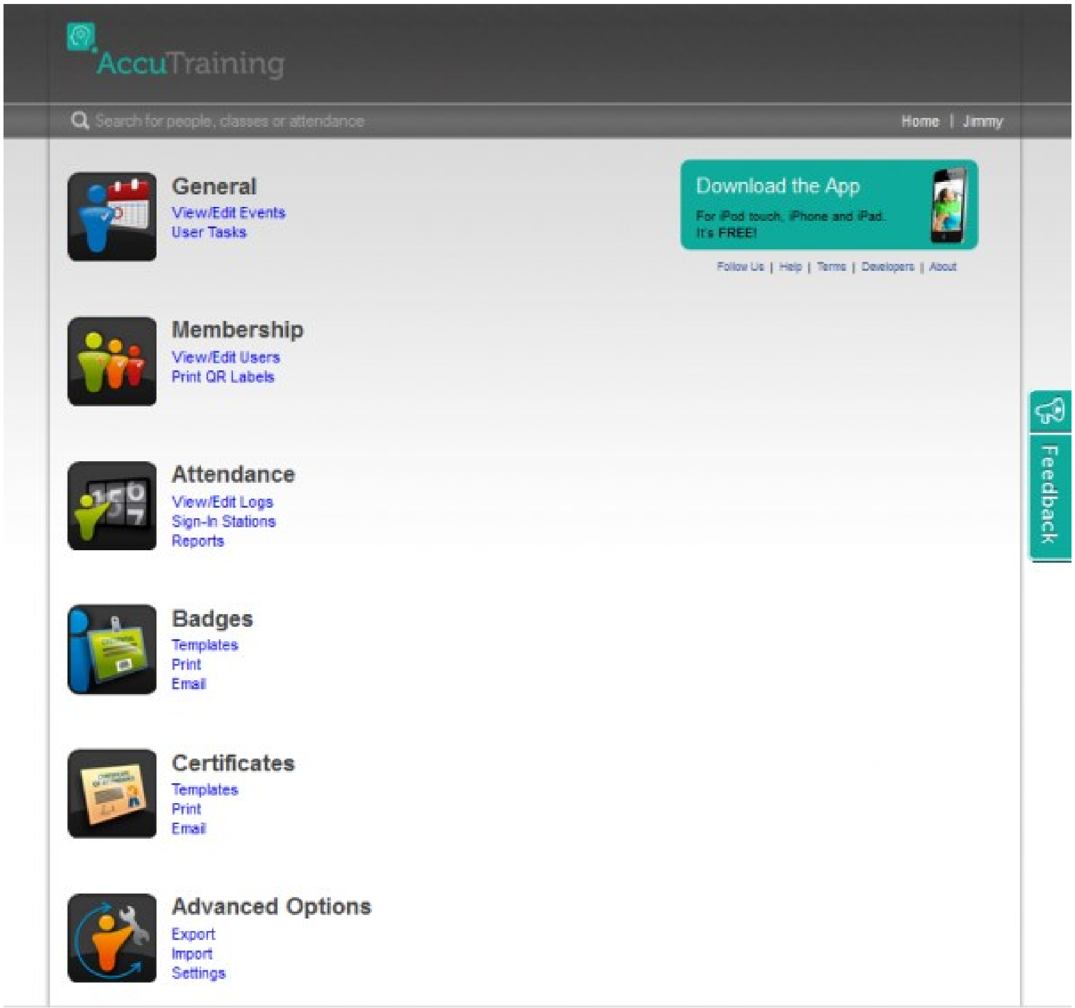
  - Employee Attendance: Shows the attendance of each employee to training sessions.
  - Training Course Attendance: Shows employees who attended a training course.
  - Location's General Stats: Shows the general statistics of the selected location.
  - Registration and Attendance: Shows the registration and attendance data for a specific session.
  - Training Plan Progress: Displays the training progress for each employee assigned to a training plan.
  - Training Progress by Employee: Displays the training progress for a specific employee.
- Optionally create training completion certificates for employees and print or email them.
- Create employee groups and use them for quicker training plan assignment.
- Take advantage of a Rules Engine for triggering actions based on certain events! For example, send an email message when an employee is added, completes a training course, etc.
- Import your employees' records instead of manual entry.
- Export attendance records to other system if needed.
- Customizable user roles.
- Change text or even entire language of application!
- API integration for developers!
- And more!

In addition, **AccuTraining** is cloud-based, which means:

- All you need to use it is a web-browser. No need to buy servers or install software!
- Simple to set up and use. Get up and running in minutes.
- Access from anywhere you have web access.
- Use on PC or Mac computers.
- Quickly make any computer a sign in station. Sign in directly through the browser or iOS App.
- Quickly view employees' credit usage and visits.

# Home Screen

This is the home screen shown below. It is the page that contains all of the menu options to interact with the http://www.**AccuTraining**.net website.




## Notable Features

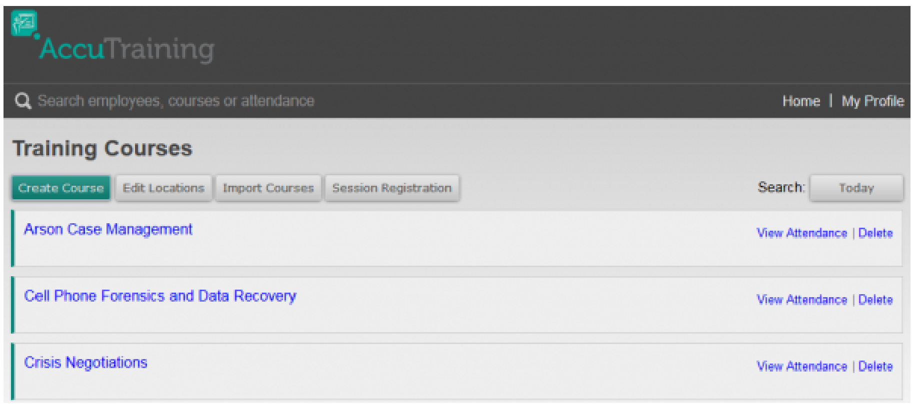
1. **Search bar at the top of all screens** - This allows you to pull up a quick view of a user, event, logs, and more simply by typing in your request.
2. **Home button** - This get you back to this screen if you happen to navigate away from the home screen.
3. **Account Settings** - This is where you can change your password, check account type, log-out, and visit the help section
4. **Feedback option on the far right of the screen** - This takes you out to **AccuTraining**.uservoice.net which is a website dedicated to hearing from you! Our users can provide helpful feedback that the programming staff can look toward using in future updates. For more information on how it works watch this video.

# General

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

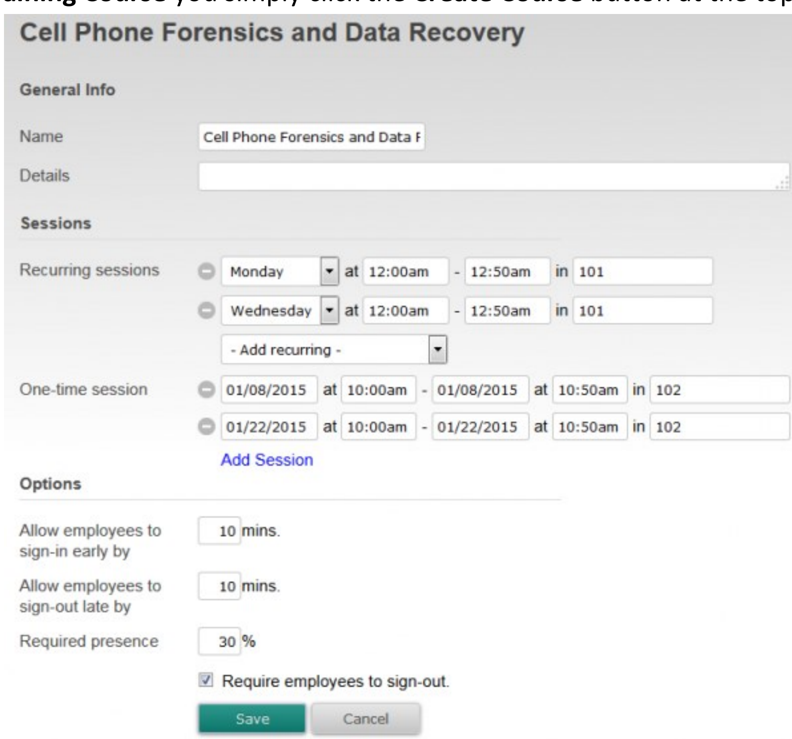
## Training Courses

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




## Create Training Courses

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*

- **Name (Required)** - This is the title of the **Training Course** that you will see throughout the **AccuTraining** website when selecting the **Training Course**.
- **Details** - this is the description of 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. Click here to learn how to create your own **Locations**.

- **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.

### *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**.

### *More Actions*

**(Teal box in top right)**

- **Delete Course** - Use this option to delete the **Training Course**.
- **View Attendance** - Use this option to view the attendance of the **Training Course**.

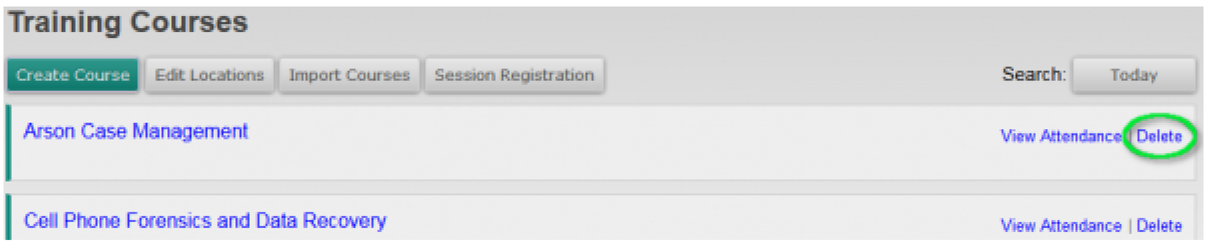
## Edit Training Courses

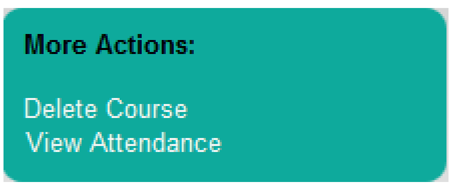
To edit a **Training Course** you simply have to click on the name of the **Training Course** when in the **Training Courses** menu.

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

## Delete Training Courses

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




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

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

## Import Training Courses

### *Valid headers:*

- **Name**
- **StartTime**
- **EndTime**
- **Location**

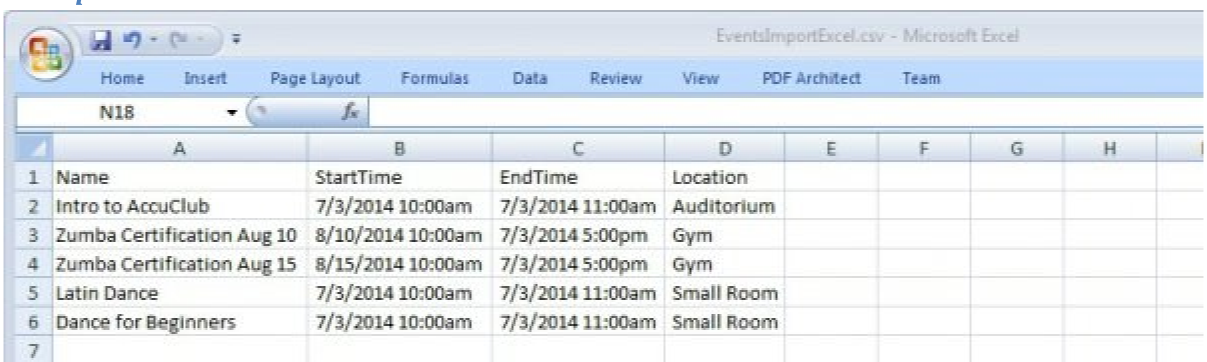
### *Explanation:*

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

The **StartTime** and **EndTime** are required. The format is **MM/DD/YYYY H:MM AM/PM**. **Example:** 7/30/2015 10:00 AM. The **EndTime** also must include the date.

The **Location** is required. It's the name of the location where the course will be held. If it does not exist, it will be created in the system.

### *Example:*




| | A | B | C | D |
|---|---|---|---|---|
| 1 | Name | StartTime | EndTime | Location |
| 2 | Intro to AccuClub | 7/3/2014 10:00am | 7/3/2014 11:00am | Auditorium |
| 3 | Zumba Certification Aug 10 | 8/10/2014 10:00am | 7/3/2014 5:00pm | Gym |
| 4 | Zumba Certification Aug 15 | 8/15/2014 10:00am | 7/3/2014 5:00pm | Gym |
| 5 | Latin Dance | 7/3/2014 10:00am | 7/3/2014 11:00am | Small Room |
| 6 | Dance for Beginners | 7/3/2014 10:00am | 7/3/2014 11:00am | Small Room |
| 7 | | | | |

[Download the example file (.csv)]

# Locations

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

## Create Locations

While in the **Training Courses** section click the **Edit Locations** button to create a new **Location**.
To create the new locations follow these steps:

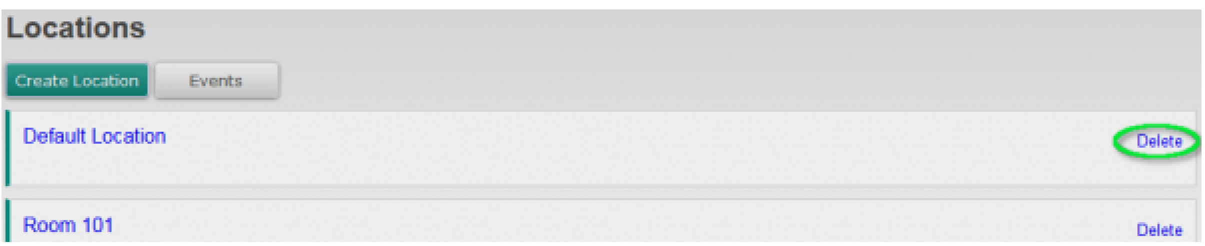
1. Click the **Create Location** button.
2. Enter a name for the **Location**.
3. Optionally add a description for the **Location**.
4. Save the **Location** by clicking the **Save** button at the bottom.

## Edit Locations

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

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

## Delete Locations




Simply click **Delete** link and confirm the deletion on the popup window to delete the **Location** when in the **Locations** screen.

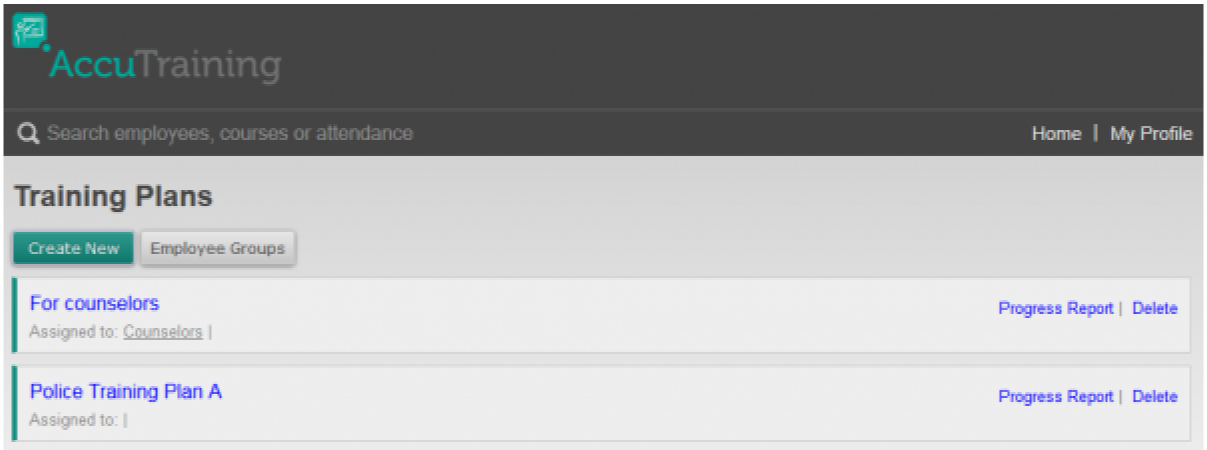
## Session Registration

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.

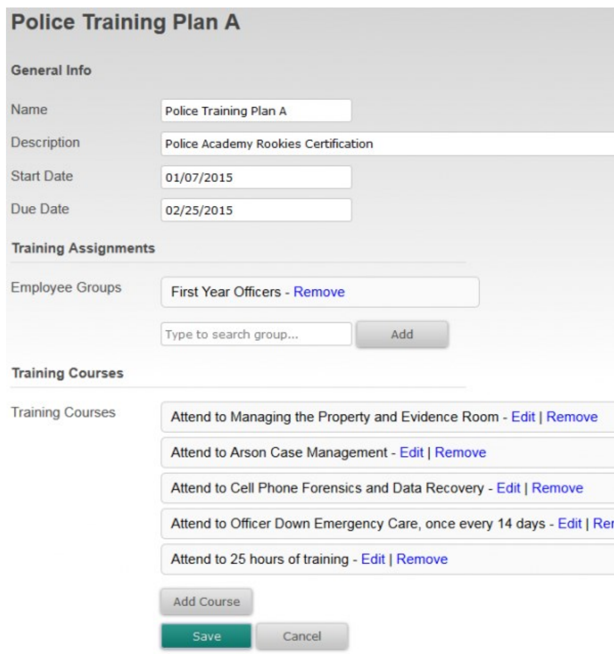
## Training Plans




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

### Create Training Plans

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**.

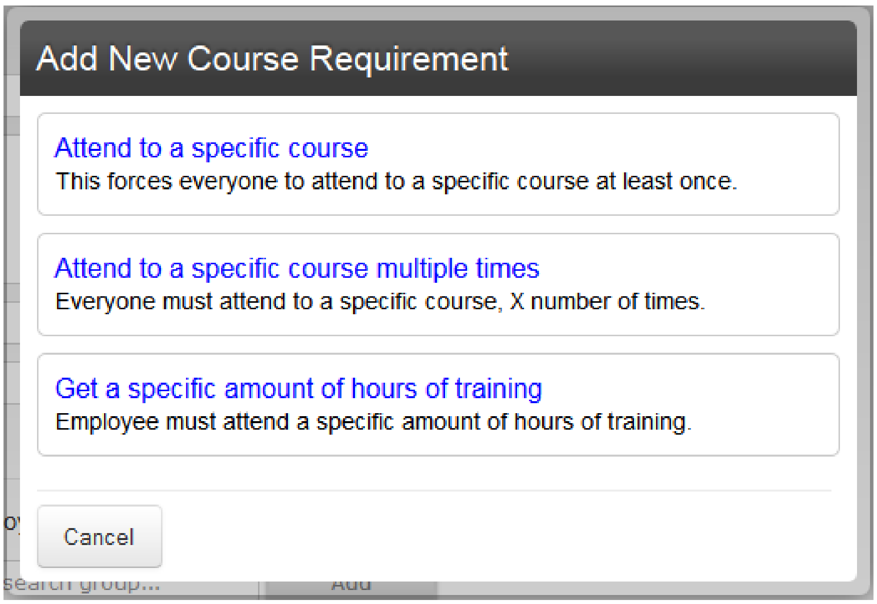
### *Training Assignments*

- **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.
        3. **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.

Once you set the information click the **Save** button at the bottom.

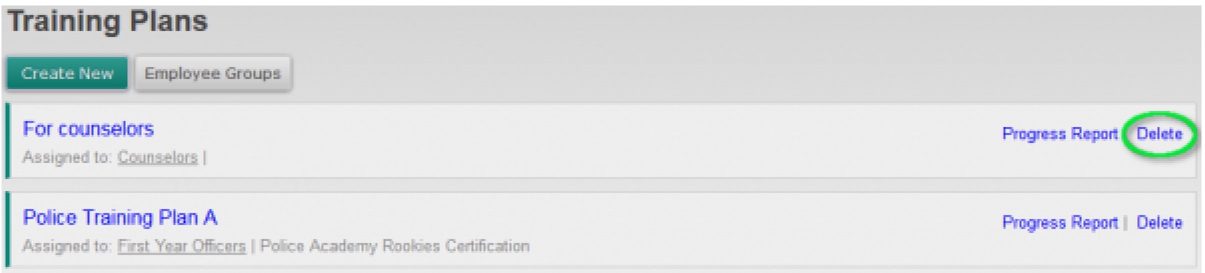
## Edit Training Plans

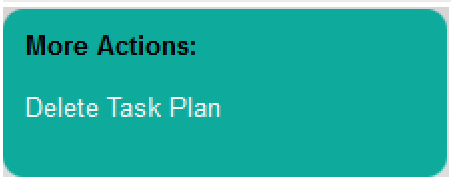
To edit a **Training Plan** you simply have to click on the name of the **Training Plan** when in the **Training Plans** menu.

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

## Delete Training Plans

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



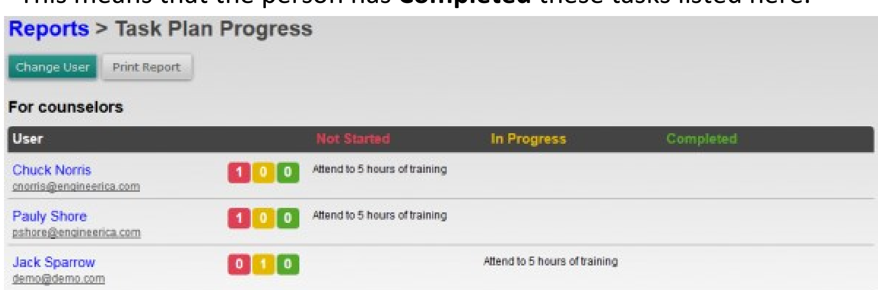




Additionally when editing a **Training Plan** you have the option to delete the **Training Plan** in a teal box located in the top right corner of the screen. Simply click **Delete Course** link and confirm the deletion on the popup window to delete the **Training Plan**.

## Training Plan Progress Reports

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

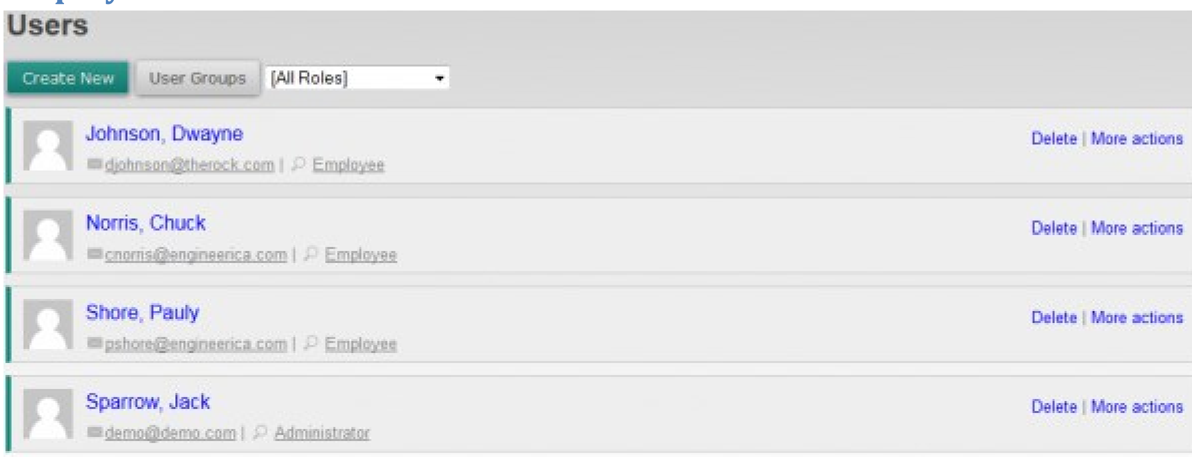
- RED - This means that the person has **Not Started** on this these tasks listed here.
- YELLOW - This means that the person is **In Progress** on these tasks listed here.
- GREEN - This means that the person has **Completed** these tasks listed here.



# Users

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

## Employees and Users




### Create Users

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

Complete the following info:

#### *User Info*

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

#### *Security*

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

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

### *Photo*

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

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

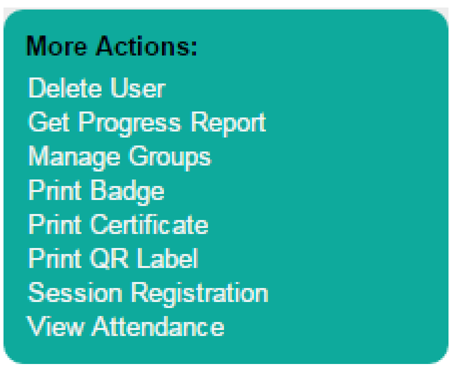
## Edit Users

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

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

### *More Actions*

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

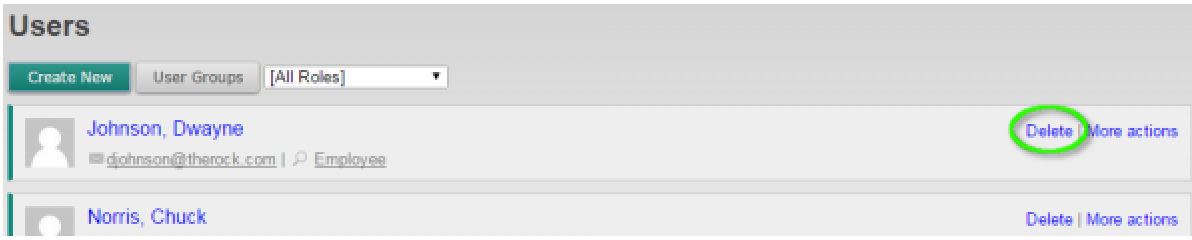



- **Delete User** - Allows you to delete the user. ***Warning! All attendance records will be lost.***
- **Get Progress Report** - Allows you to get a personalized Progress Report for this User.
- **Manage Groups** - Manage the **Employee Groups** this user belongs to.
- **Print Badge** - Print this User's Badge.
- **Print Certificate** - Print this User's Certificate.
- **Print QR Label** - Print this User's QR Label.
- **Session Registration** - Manage the Registration for this User in each Training Course.
- **View Attendance** - View this User's Attendance.

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

## Delete User

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




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

## Importing Users

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

### *Valid headers:*

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

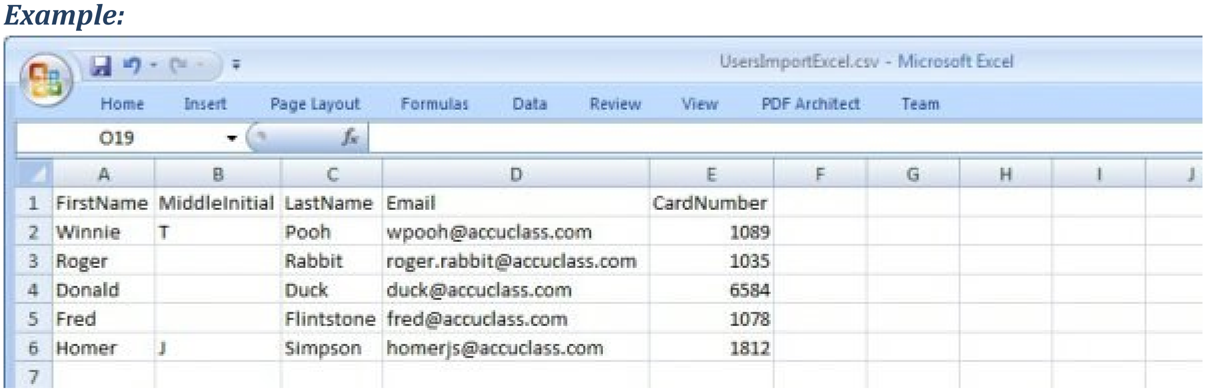
### *Explanation:*

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 optional. It's only useful if you plan to track attendance by reading physical cards using a card reader or the mobile app for iPod touch/iPhone/iPad.

### *Example:*




| | A | B | C | D | E |
|---|---|---|---|---|---|
| 1 | FirstName | MiddleInitial | LastName | Email | CardNumber |
| 2 | Winnie | T | Pooh | wpooh@accuclass.com | 1089 |
| 3 | Roger | | Rabbit | roger.rabbit@accuclass.com | 1035 |
| 4 | Donald | | Duck | duck@accuclass.com | 6584 |
| 5 | Fred | | Flintstone | fred@accuclass.com | 1078 |
| 6 | Homer | J | Simpson | homerjs@accuclass.com | 1812 |
| 7 | | | | | |

[Download the example file (.CSV)]

## Print QR Labels

This is a printable sheet of 16 QR codes on 1-1/2” x 1-1/2” squares with the names and card numbers of each user in that **Employee Group**. Recommended printing with *Avery® Easy Peel® White Square Labels 22805, 1-1/2” x 1-1/2”, Pack of 600*.

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

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

## Employee Groups

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

### Create an Employee Group

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

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

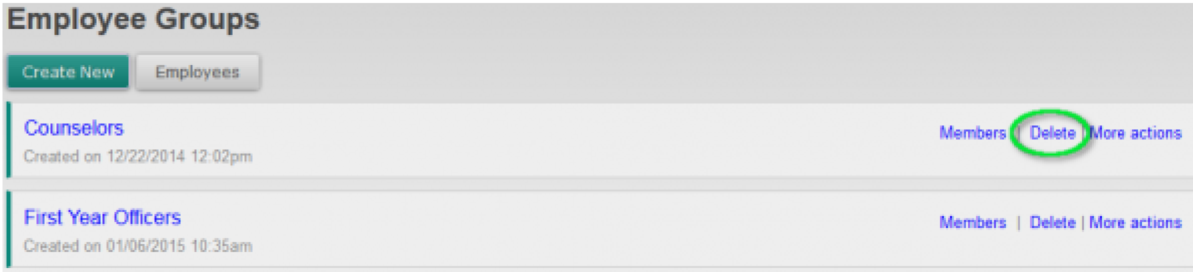
### Edit an Employee Group

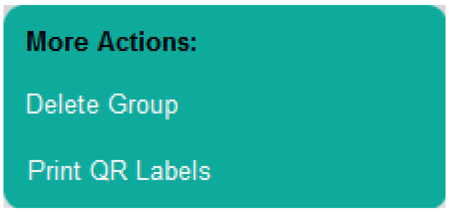
To edit an **Employee Group** you simply have to click on the name of the **Employee Group** when in the **Employee Group** menu.

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

## Delete an Employee Group

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

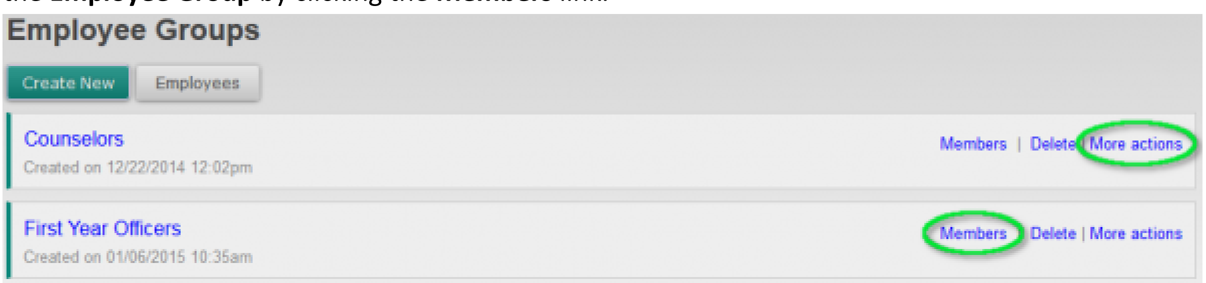



Additionally when editing an **Employee Group** you have the option to delete the **Employee Group** in a teal box located in the top right corner of the screen. Simply click **Delete Course** link and confirm the deletion on the popup window to delete the **Employee Group**.

## Additional Options

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




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

- **Print QR labels** - This is a printable sheet of 16 QR codes on 1-1/2" x 1-1/2" squares with the names and card numbers of each user in that **Employee Group**. Recommended printing with *Avery® Easy Peel® White Square Labels 22805, 1-1/2" x 1-1/2", Pack of 600*.

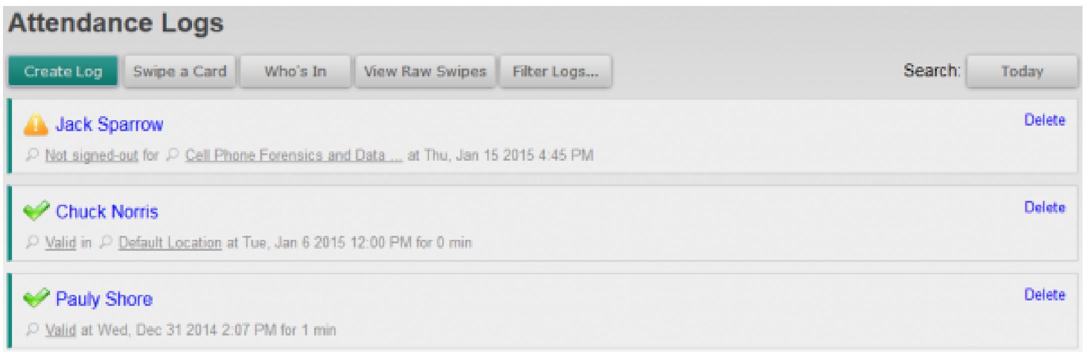
This can also be done in the teal box in the top right corner of the screen when editing the **Employee Group**.

# Attendance

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

## Attendance Logs

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




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

### Create an Attendance Log

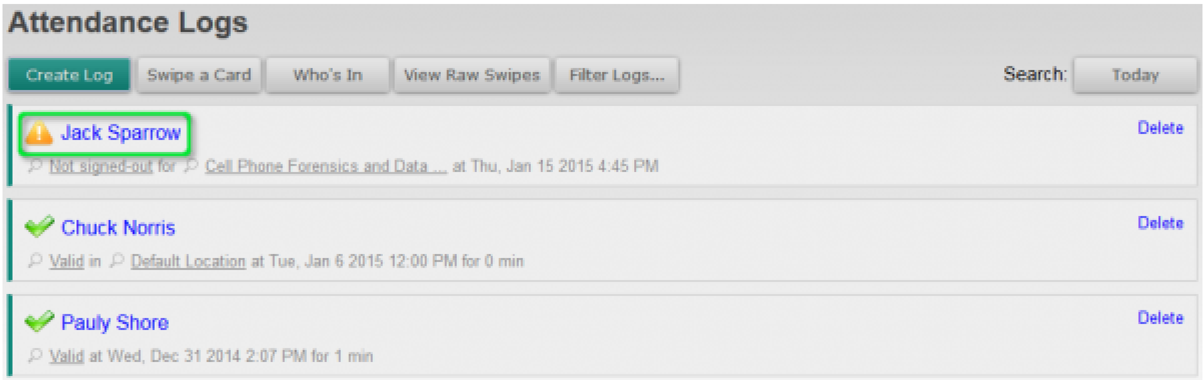
This can be done easily by clicking the **Create Log** button in the top left corner of the **Attendance Log** screen. Once there fill out and complete these fields to create an **Attendance Log**.

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

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

## Edit an Attendance Log

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




Once there you have all the same fields as if you were creating the log. You can change any of the information on the log including **Employee**, **Location**, **Training Course**, and add/remove **In / Out** swipes. Notice that if you want to remove a **In / Out** swipe there is a red ball symbol (•) that you can click to remove the swipe.

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

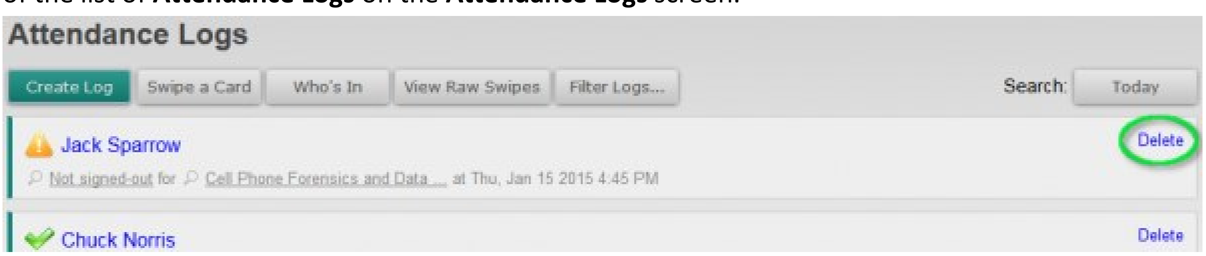
1. Select either **IN** or **OUT** in the first drop-down menu.
2. Click the date field and select a date on the popup calendar.
3. Click the time field and type in the time or select one from the drop-down menu.
4. Then click the green plus symbol (+) to add the in/out swipe.

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

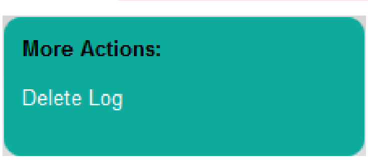
Finally be sure to save your changes to the **Attendance Log** by clicking the **Save** button at the bottom.

## Delete an Attendance Log

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




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




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

## Swipe a Card

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

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

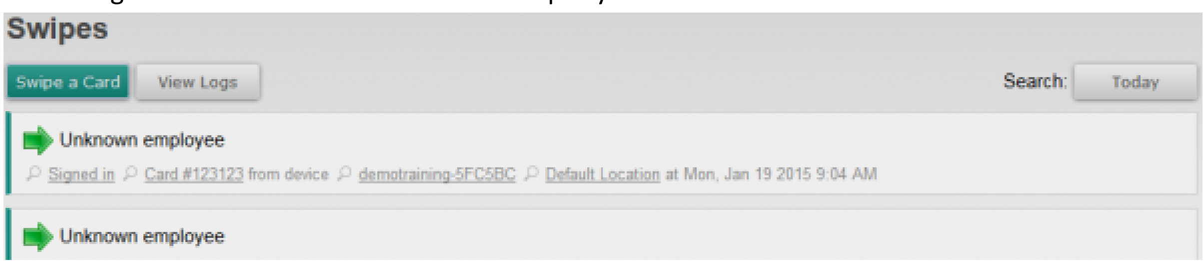
- **Swipe Type** - Set whether a swipe in or out.
- **Location** - Set the place where the training is taking place.
- **Training Course** - Assign the swipe in/out to a particular course.
- **Card Number** - This is where you swipe, type, or scan in the barcode.

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

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

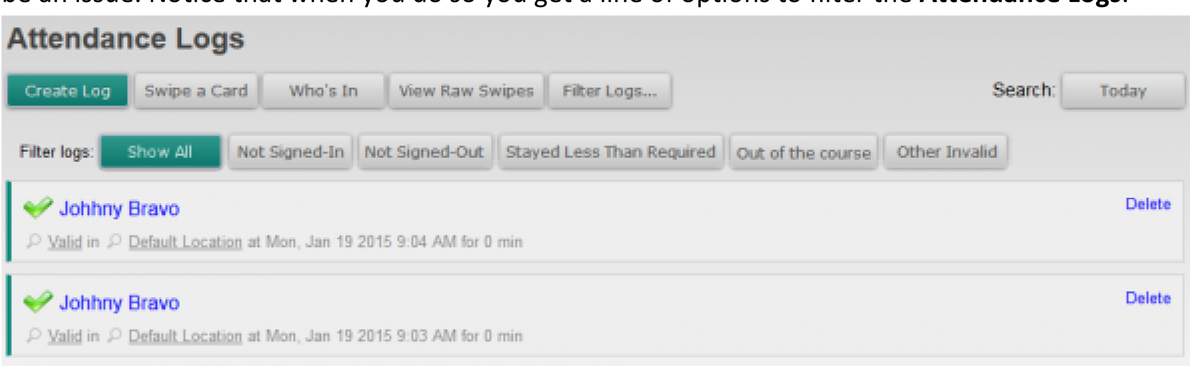
## View Raw Swipes

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




## Filter Logs

By pressing the **Filter Logs** button on the **Attendance Logs** screen you can quickly see any logs that may be an issue. Notice that when you do so you get a line of options to filter the **Attendance Logs**.



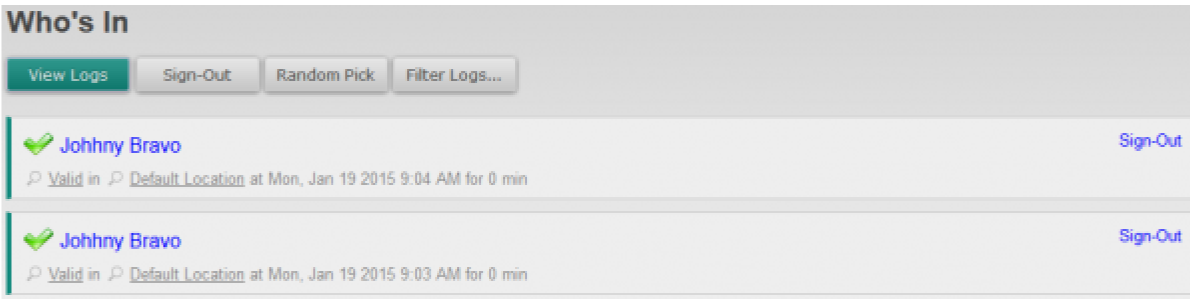

To correct the issues in **AccuTraining Attendance Logs** there are several errors that can occur in **Employees** attendance. If you click on the corresponding button you will see **Attendance Logs** that match the following criteria:

- **Not Signed-In** - This is where an **Employee** forgets to swipe in for a **Training Course**.
- **Not Signed-Out** - This is where an **Employee** forgets to swipe out for a **Training Course**.

- **Stayed Less than Required** - This is where an **Employee** stays signed in for less than the required presence for a **Training Course**.
- **Out of the Course** - This is where an **Employee** signs into a **Training Course** that they are not registered to attend.
- **Other Invalid** - This is where an **Employee** has an error in swiping for a **Training Course**. **Examples:** An **Employee** signs-in twice, an **Employee** signs-in and out but then signs-in again but finally forgets to sign-out, etc.

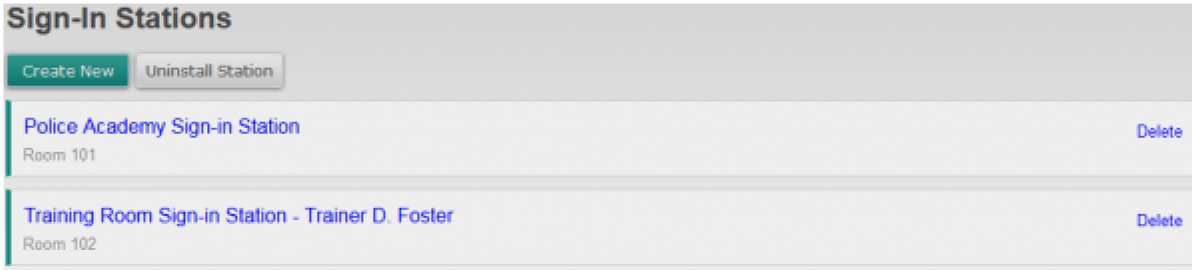
## Who's In

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



## Sign-In Stations

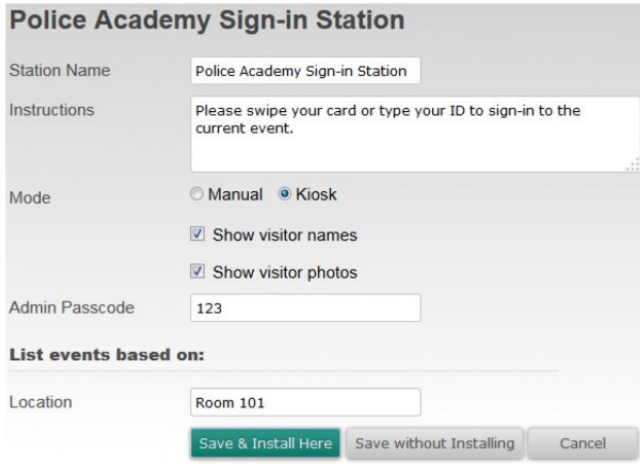
**Sign-in Stations** allow you to setup a designated computer that your **Employees** can Sign-in on. This can be done via a web-enabled device such as a Desktop PC, Laptop Computer, and/or a tablet or mobile device.



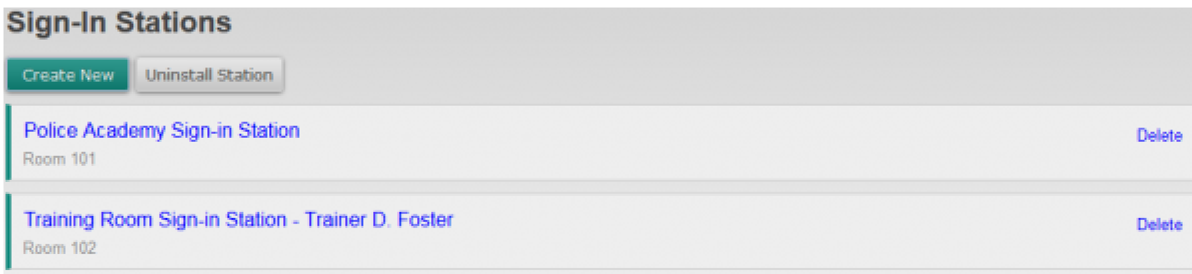

### Create a Sign-In Station

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

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

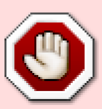



The Sign-in Stations you've created should now appear in the list of Sign-in Stations.




## Delete a Sign-in Station

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



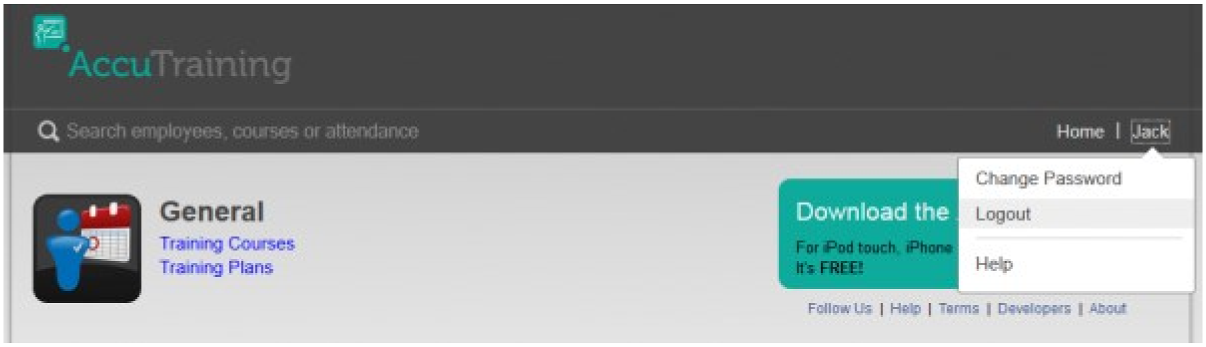
This is permanent and you do not get a confirmation popup so if you want to just want to remove the PC from being a Sign-in Station then click the Uninstall button to uninstall the sign-in station.

## Uninstall a Sign-In Station

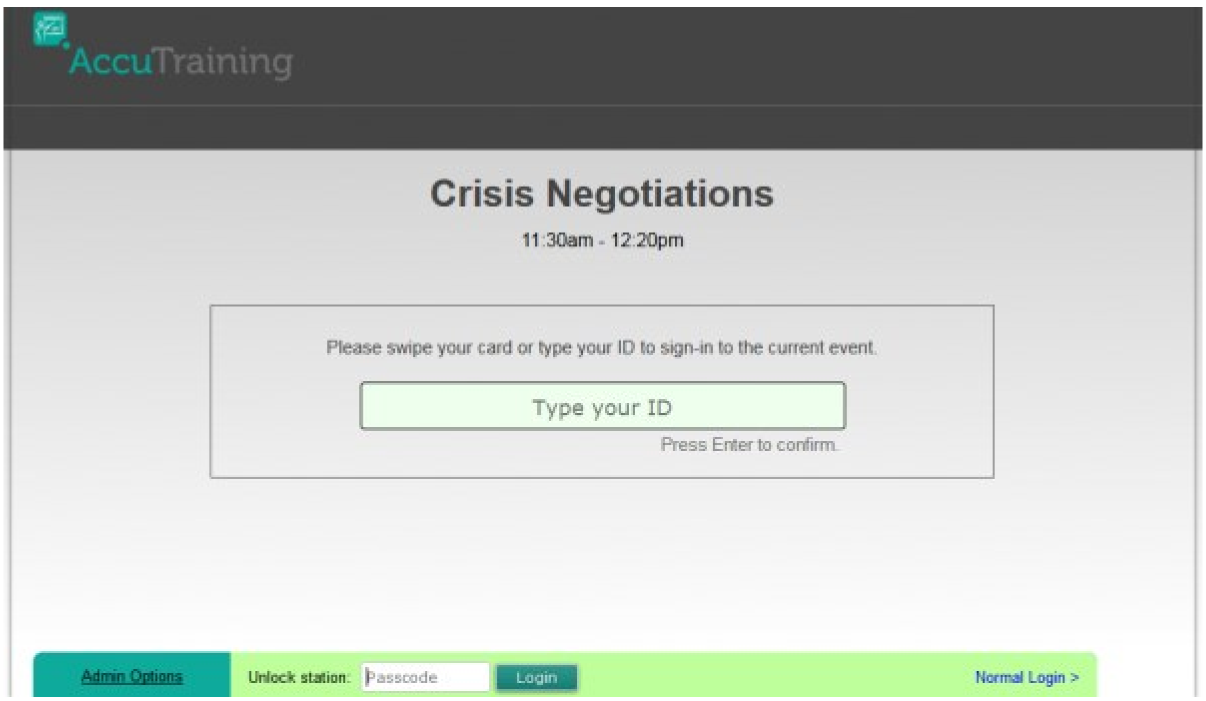
1. Click **Uninstall** button above the Sign-In Station listing.

## Sign-in Station Mode

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



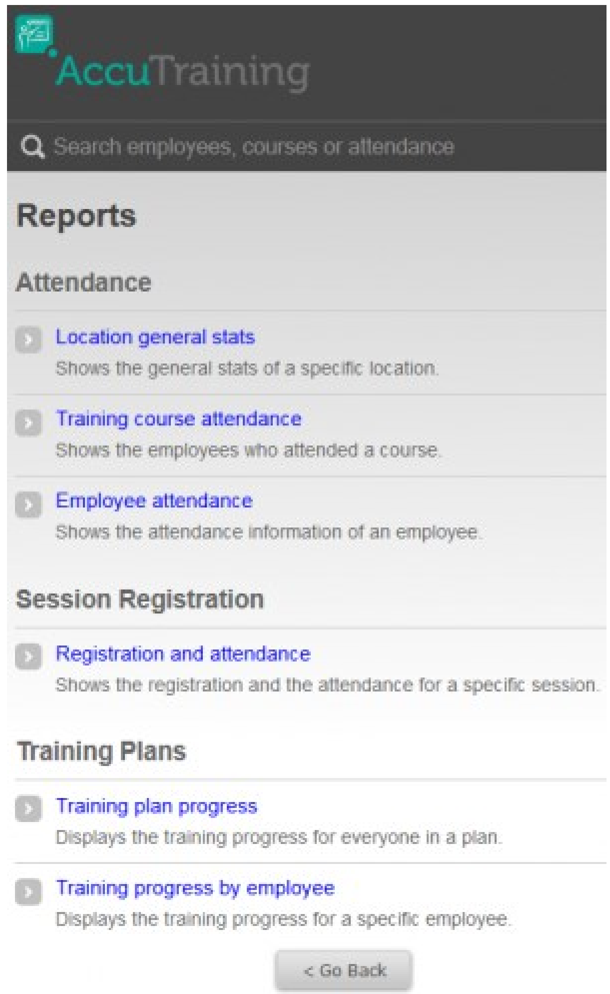

Here is a sample sign-in screen:




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

## Reports

These are the available reports in **AccuTraining**. You can see that you can get attendance data based on **Locations**, **Employees**, and even **Training Course**. Filtering options and more make **AccuTraining Reports** the industry leader in Employee training software.




### Attendance Reports

#### *Location general stats*

- Shows the general stats of a specific location.

#### *Training course attendance*

- Shows the employees who attended a course.

#### *Employee attendance*

- Shows the attendance information of an employee.

### Session Registration Reports

#### *Registration and attendance*

- Shows the registration and the attendance for a specific session.

### Training Plans Reports

#### *Training plan progress*

- Displays the training progress for everyone in a plan.

#### *Training progress by employee*

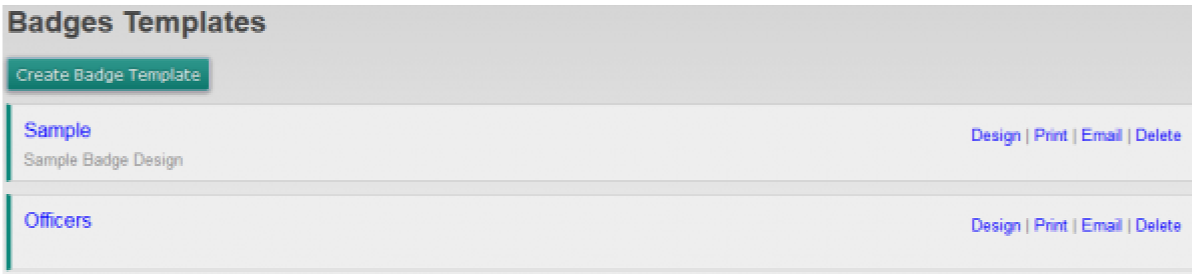
- Displays the training progress for a specific employee.

# Badges

The **Badges** section is a really great tool to generate professional looking badges that can be used to scan **Employees** in and out of **Training Courses** using either a barcode reader/PC or the **AccuTraining** app's built-in camera functions available in the Apple Store.

## Templates

This section allows you to create completely custom badges using either our templates or your own imagination. Now you can even create a different design for different **Employee Groups**!




### Create Badge Template

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. Now please skip to the Design heading for more.

### Modify Badge Template

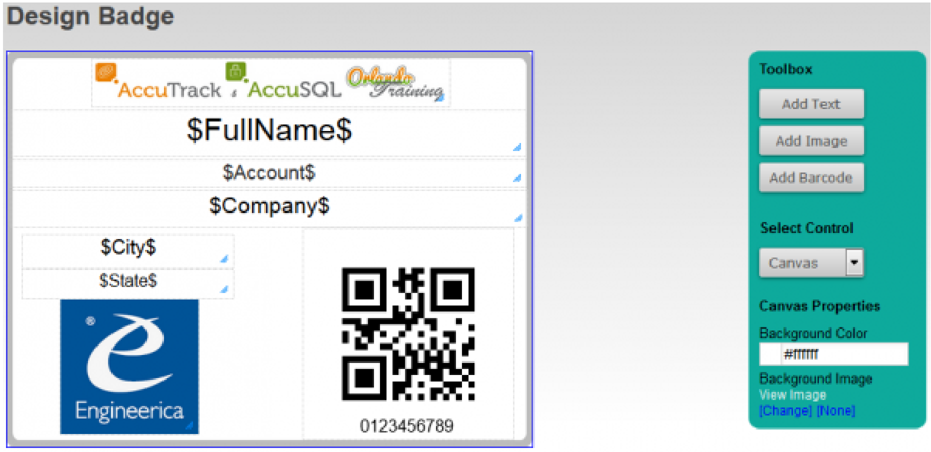
To edit a **Badge Template** simply click the blue highlighted title of the **Badge Template**. Here you'll be able to rename and/or change the description.

### Delete Badge Template

Simply click the **Delete** link on the far right-side of the Badge Template while viewing the list of Badge Templates and confirm the deletion on the popup window.

## 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.

### More Options

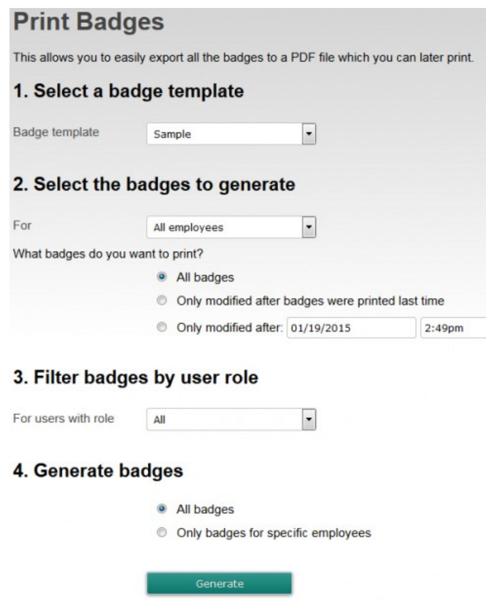
Notice on the right-side of each badge template you have the ability to do the following:

- **Design** - This brings up the Design screen.
- **Print** - This brings up the Print Options screen.
- **Email** - This brings up the Email Options screen.
- **Delete** - This allows you to delete this **Badge Template**.

## 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) or a custom **User Role** you created. More info about custom User Roles here.
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 Badges** to print out.


The **Avery part number for badges that you need 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.

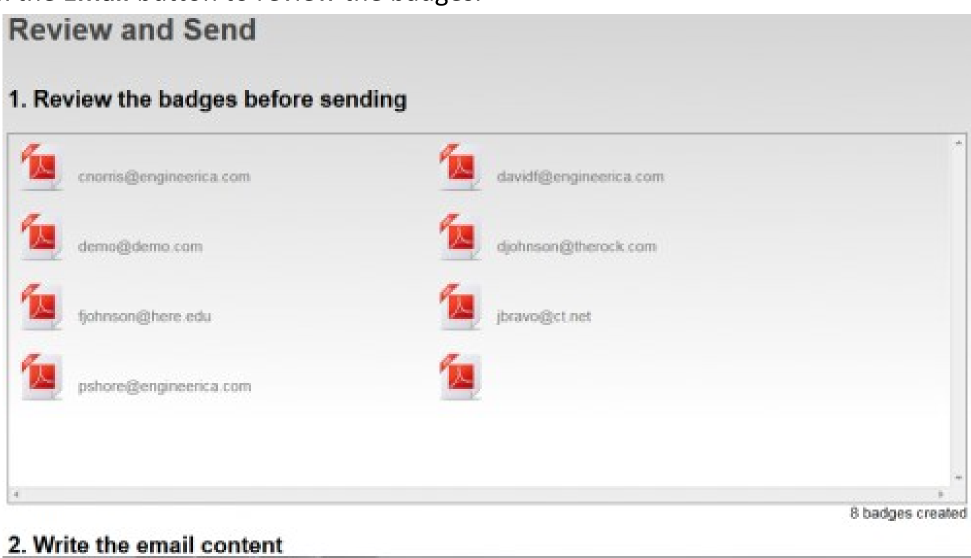
## Email

Now you can even **Email** the **Badges** out to your **Employees** so they can have them printed and ready to go when they arrive for training! This allows you to easily email all the badges in PDF format to the users.

As this is intended for emailing the **Badges**, each one is placed in a different file. If you want all the badges in a single file, use the **Print Badges** option instead. In both cases, depending on the size of your account, it might take several minutes to complete.

Once the badges are generated, you will be able to review the badges before sending them.

1. Select a badge template from the list of badges you designed.
2. Select the group of **Employees** the badges are to be emailed.
    - **All Employees**
    - **Only Employees with Attendance**
3. Set what badges do you want to email?
    - **All badges**
    - **Only modified after: (M/D/YYYY H:MM AM/PM)**
4. Filter badges by user role - Set this for users with a particular **User Role**
5. Now choose to **Email badges** for all or specific user(s).
    - **All badges**
    - **Only badges for specific user(s)**
6. Click the **Email** button to review the badges.



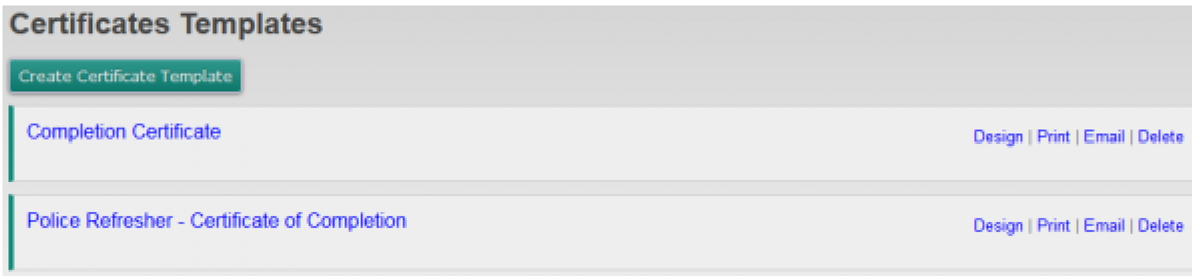

7. Finally after reviewing and writing the email message to be sent click the **Email Badges** button.

# Certificates

The **Certificates** section is a really great tool to generate professional looking Certificates that can be printed or sent to **Employees** who complete **Training Courses** and/or **Training Plans**. Since you can completely customize as many Certificates as you want these can be customized for different completion levels or types.

## Templates

This section allows you to create completely custom Certificates using either our templates or your own imagination. Now you can even create a different design for different completion levels and/or types!




### Create Certificate Template

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. Now please skip to the Design heading for more.

### Modify Certificate Template

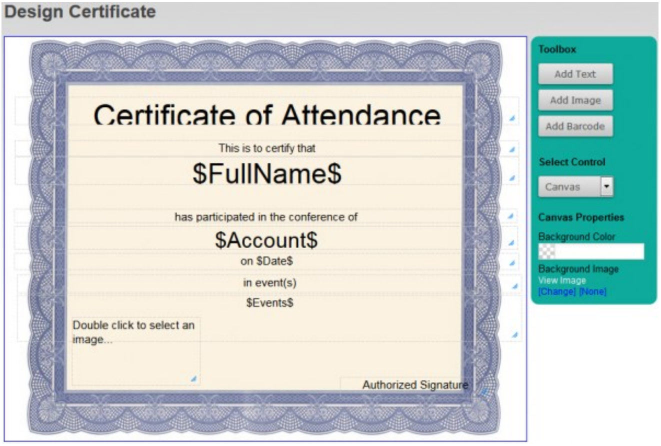
To edit a **Certificate Template** simply click the blue highlighted title of the **Certificate Template**. Here you'll be able to rename and/or change the description.

### Delete Certificate Template

Simply click the **Delete** link on the far right-side of the Certificate Template while viewing the list of Certificate Templates and confirm the deletion on the popup window.

## 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.

## More Options

Notice on the right-side of each Certificate template you have the ability to do the following:

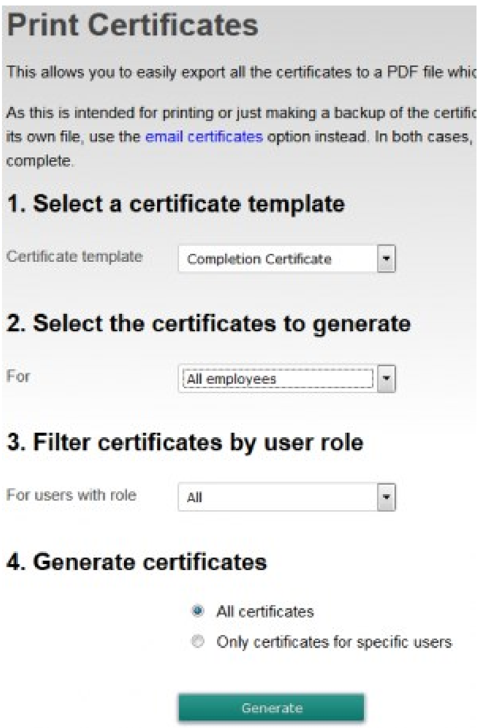
- **Design** - This brings up the Design screen.
- **Print** - This brings up the Print Options screen.
- **Email** - This brings up the Email Options screen.
- **Delete** - This allows you to delete this **Certificate Template**.

## Print

This section allows you to print your **Certificates** you have designed in the **AccuTraining** software. As well you have many options as far who you want to print the **Certificates** for in this section.

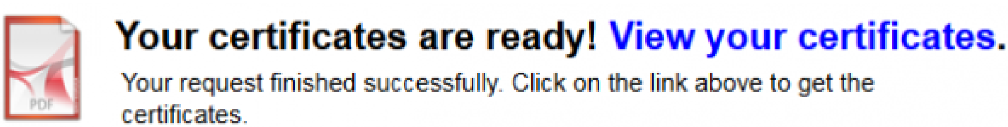
This section allows you to print your **Certificates** you have designed in the **AccuTraining** software. You have many options as far as what **User Role**, which **Certificate Template**, and even for only certain individuals or all of the **Users** that you want to print the **Certificates**.

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




1. First select a **Certificate Template**.
2. Select whether to print the **Certificates** for all or those only with attendance.
3. Now set what **Certificates** you want to print.
   - **All Certificates**
   - **Only modified after Certificates 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) or a custom **User Role** you created. **More info about custom User Roles here.**
5. Now select whether to print only individual **Certificates** or all **Certificates** and then click the **Generate** button. Wait until **AccuTraining** generates your Certificates and the bottom section of the screen shows the message ***Your Certificates are ready, click on View Certificates to download.***

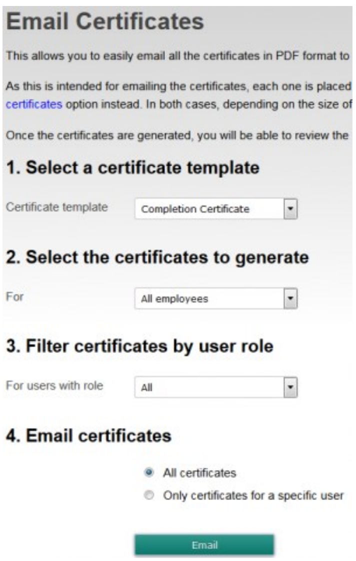
A confirmation screen will show at the bottom of the screen and click the **View Certificates** to print them out.



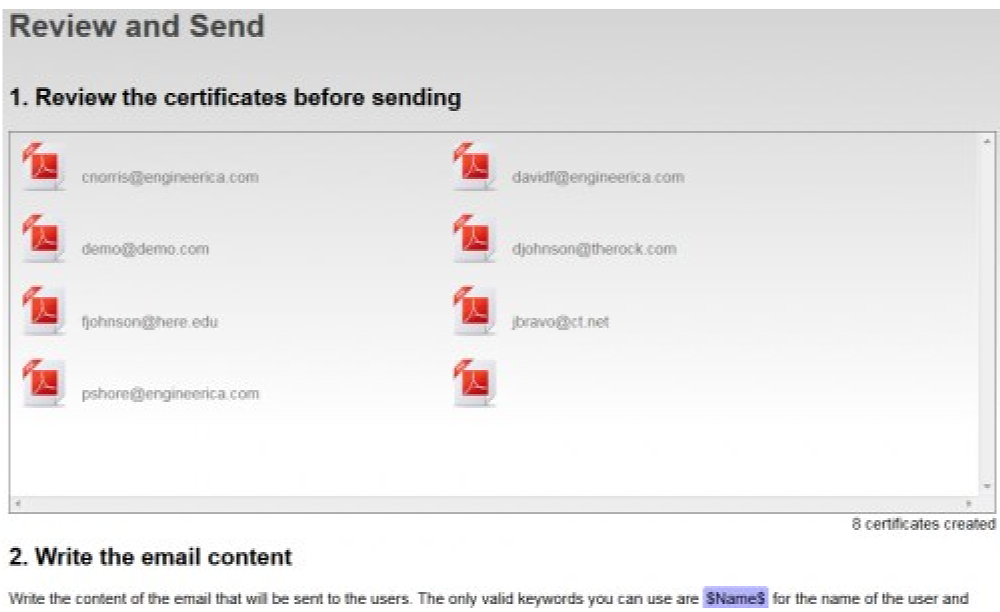
## Email

Now you can even **Email** the **Certificates** out to your **Employees** so they store these electronically if needed and/or print them for their wall!

As this is intended for emailing the **Certificates**, each one is placed in a different file. If you want all the Certificates in a single file, use the **Print Certificates** option instead. In both cases, depending on the size of your account, it might take several minutes to complete.
Once the Certificates are generated, you will be able to review the Certificates before sending them.




1. Select a Certificate template from the list of Certificates you designed.
2. Select the group of **Employees** the Certificates is to be emailed.
   - **All Employees**
   - **Only Employees with Attendance**
3. Set what Certificates do you want to email?
   - **All Certificates**
   - **Only modified after: (M/D/YYYY H:MM AM/PM)**
4. Filter Certificates by user role - Set this for users with a particular **User Role**.
5. Now choose to **Email Certificates** for all or specific user(s).
   - **All Certificates**
   - **Only Certificates for specific user(s)**
6. Click the **Email** button to review the Certificates.



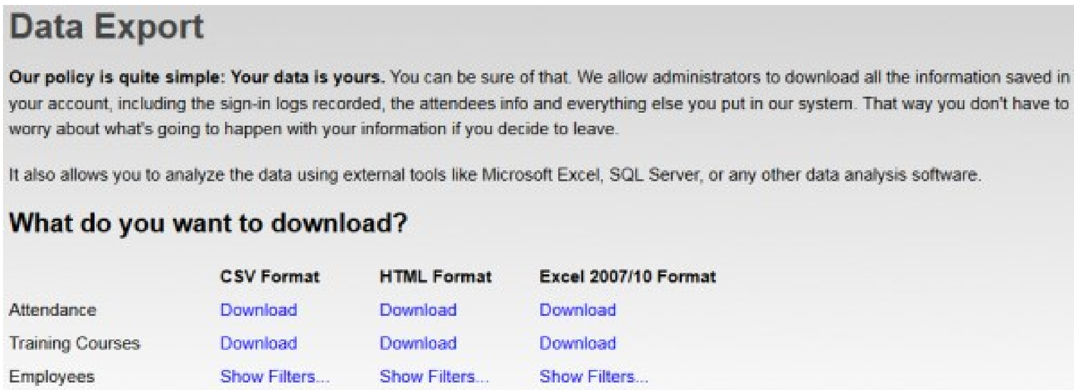

7. After reviewing and writing the email message to be sent click the **Email Certificates** button.

# Advanced Options

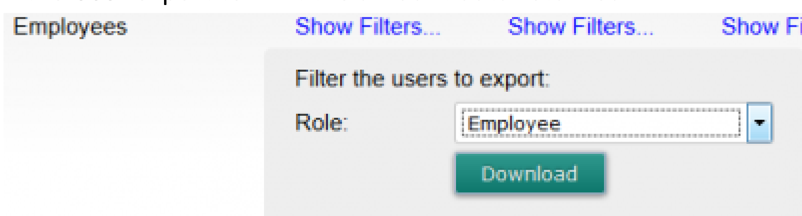
This is where you configure all of the back-end settings for the **AccuTraining** software. You can set and manage the software rules, modify user roles, control attendance settings globally, and define Terminology.

## Export

Here you can **Export** your Users, Training Courses, and Attendance.   Choose from **CSV** (Comma Separated Values), **HTML** (Web Document), or **MS Excel 2007/2010** (XLS) formats for your exports.




Filters can be set on the **User** export to limit the amount data returned…




## Import

Here's the place where you can import your **Employees or Users**, your **Training Courses** and everything to quickly get started. To make it as simple as possible we have defined a bunch of examples to follow. By creating a file as explained below, you can directly upload the file and it will recognize it as valid one, knowing completely what to do.

### *File Format*

By now, only **Comma-Separated-Values (CSV)** files are supported. This format is broadly supported by many applications including Microsoft Excel it also can be created using any simple text editor. In the first line of the file the headers must be included (check the list of valid headers below), then, the data must be included separating each column by a comma. In the case you need to write a comma in the data itself, you can prevent format errors by enclosing the full value in double quotes.

### *Time Zone*

Please note that before you import any courses it's important that you set the correct time zone for your account.
To set the time zone please go to **Advanced Options** > **Settings** in the main menu or [click here].

## Importing Training Courses

### *Valid headers:*

- **Name**
- **StartTime**
- **EndTime**
- **Location**

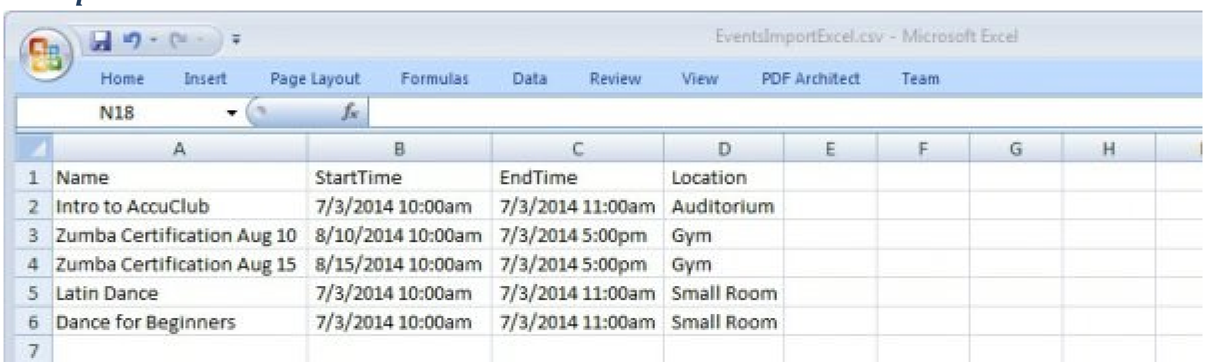
### *Explanation:*

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

The **StartTime** and **EndTime** are required. The format is **M/D/YYYY H:MM AM/PM**, **Example:** 7/30/2015 10:00 AM. The **EndTime** also must include the date.

The **Location** is required. It's the name of the **Location** where the course will be held. If it does not exist, it will be automatically be created in the system.

### *Example:*




| | A | B | C | D | E | F | G | H |
|---|---|---|---|---|---|---|---|---|
| 1 | Name | StartTime | EndTime | Location | | | | |
| 2 | Intro to AccuClub | 7/3/2014 10:00am | 7/3/2014 11:00am | Auditorium | | | | |
| 3 | Zumba Certification Aug 10 | 8/10/2014 10:00am | 7/3/2014 5:00pm | Gym | | | | |
| 4 | Zumba Certification Aug 15 | 8/15/2014 10:00am | 7/3/2014 5:00pm | Gym | | | | |
| 5 | Latin Dance | 7/3/2014 10:00am | 7/3/2014 11:00am | Small Room | | | | |
| 6 | Dance for Beginners | 7/3/2014 10:00am | 7/3/2014 11:00am | Small Room | | | | |
| 7 | | | | | | | | |

[Download the example file (.CSV)]

## Importing Users

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

### *Valid headers:*

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

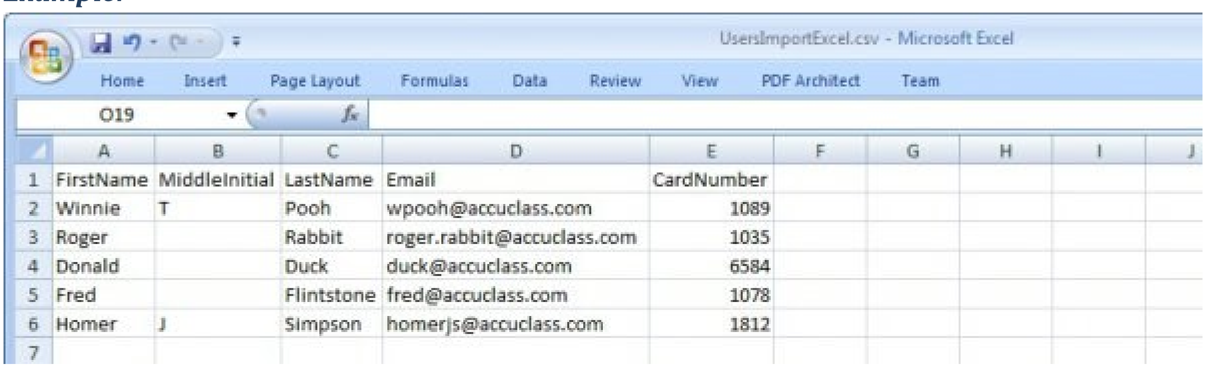
### *Explanation:*

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 optional. It's only useful if you plan to track attendance by reading physical cards using a card reader or the mobile app for iPod touch/iPhone/iPad.

### *Example:*




| FirstName | MiddleInitial | LastName | Email | CardNumber |
|---|---|---|---|---|
| Winnie | T | Pooh | wpooh@accuclass.com | 1089 |
| Roger | | Rabbit | roger.rabbit@accuclass.com | 1035 |
| Donald | | Duck | duck@accuclass.com | 6584 |
| Fred | | Flintstone | fred@accuclass.com | 1078 |
| Homer | J | Simpson | homerjs@accuclass.com | 1812 |

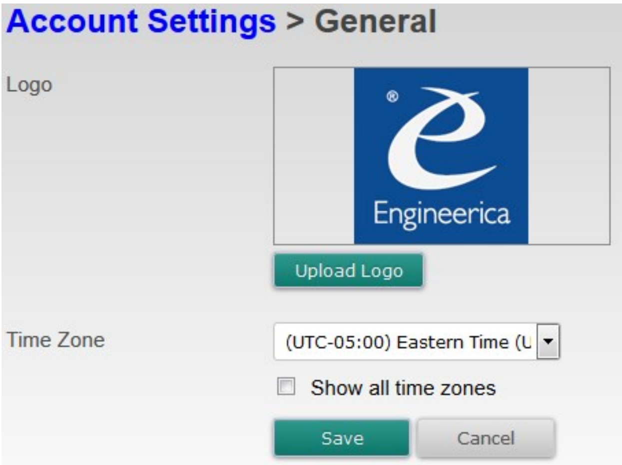
[Download the example file (.CSV)]

## Settings

The following are all the control options in an easy to navigate control panel. The **Settings** control every aspect of how the **Users** interact with the system.

### General

General account settings, such as the time zone, user profiles, etc.

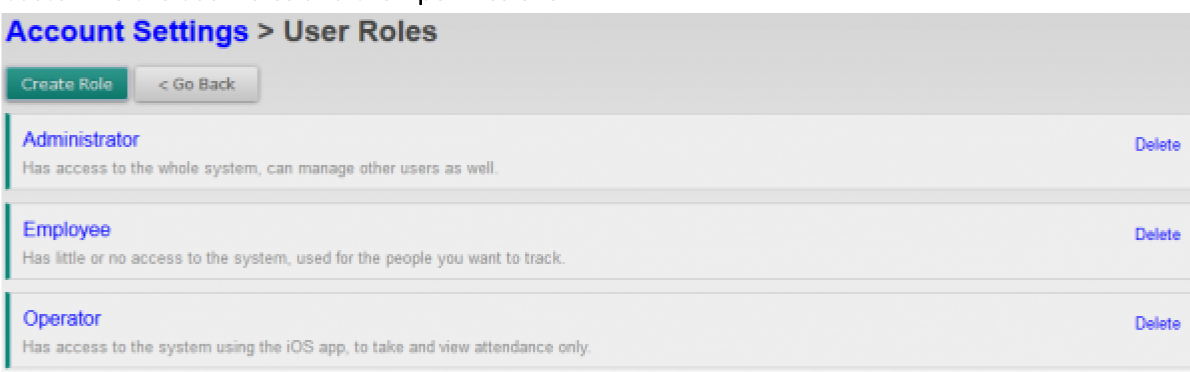



***Settings:***

- **Logo** - This can be the company logo or even the training series logo which will appear on the **Badges** by default.
- **Timezone** 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. timezones show up but you can check the box to show all timezones if you are doing the training outside of the U.S. timezones.

### User Roles

Customize the user roles and their permissions.




#### *Default User Roles*

There are three distinct default **User Roles** in **AccuTraining** which are **Administrator**, **Operators**, and **Employees**. These default **User Roles** are explained below:

### *Administrators*

**Administrators** have access to the whole system; can manage other users as well.

You can click on the blue highlighted title of this **User Role** to edit permissions for this role although it is not recommended. If you want to create a lesser **Administrator** role it is recommended that you follow the steps below to create a **Custom User Role**.

***Do not delete this User Role!*** You are a part of this **User Role** so if you want to you can simply edit it by clicking the title. If there are certain areas that you think you may never use then you can remove them by editing this **User Role** but this is only recommended for advanced users.

### *Operators*

**Operators** have access to the system using the **AccuTraining** Apple app only for taking attendance and possibly viewing attendance.

You can click on the blue highlighted title of this **User Role** to edit permissions for this role.

It is recommended that to you edit this **User Role** rather than delete it. Simply by clicking the title you can edit this **User Role**. If there are certain areas that you think these users may never use then you can remove them or you can give them more access to items they need but this is only recommended for advanced users.

### *Employees*

**Employees** have little or no access to the system, used as the group of people you want to track.

You can click on the blue highlighted title of this **User Role** to edit permissions for this role.

It is recommended that to you edit this **User Role** rather than delete it. Simply by clicking the title you can edit this **User Role**. If there are certain areas that you think these users may never use then you can remove them or you can give them more access to items they need but this is only recommended for advanced users.

### *Custom User Roles*

**Custom User Roles** are roles that you can make to give special permissions to a group of people that you want to make have more permissions than an **Employee** but less than an **Operator** or even more permissions than an **Operator** but less than an **Administrator**. Basically you are able to set the amount or level of permissions that the **Custom User Role** should have.

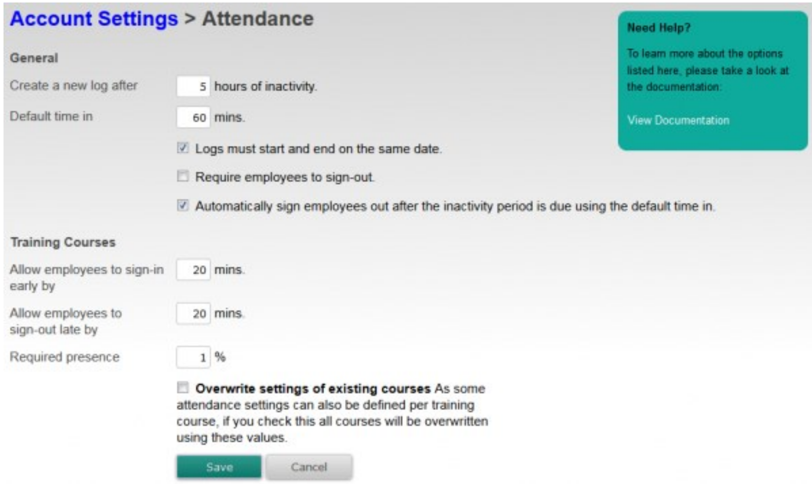
### *Create a Custom User Role*

**Custom User Roles** are a great way to define your own types of **Users**. They can be or do anything you define for them. If there is a default **User Role** such as **Administrators**, **Operators**, or **Employees** you want to base them off of you can do this too. **At the moment this is only recommended for advanced users**. To get started do the following:

1. Click the **Create Role** button on the **User Roles** screen.
2. Fill-in the **General Info**:
   - **Name** - The name of the User Role you are creating and that you will see when assigning it to **Users**.
   - **Description** - This field helps to describe the User Role for someone not sure on if they should assign the **User** the **Custom User Role**.
3. Now set the **Define Policy** by clicking either the **Select from Template** or **Advanced Editor** button:
   - **Select from Template** - This option allows you to start off by using one of the default **User Roles** and modifying it.
   - **Advanced Editor** - This option allows you to define a completely new policy from scratch.
4. Finally be sure to click the **Save** button at the bottom of the screen.

## Attendance

In this area we set **Attendance** tracking settings, i.e. if sign-out is required, presence % for events, etc.




These settings are across the entire **AccuTraining** software.

### *General*

- **Create a new log after X hours of inactivity** - This allows you to auto-logout **Employees** who have exceeded **X** minutes.
- **Default time in X mins** - This allows you to set the default amount of time your typical **Training Course** last and can be set below to give an **Employee** this time if the **Employee** exceeds the above **X** minutes.
- **Logs must start and end on the same date** - Check this box if you will be tracking training sessions that last longer than within the same day.
- **Require employees to sign-out** - This allows you to set whether you require sign-outs for the training sessions.
- **Automatically sign employees out after the inactivity period is due using the default time in** - Check this box if you prefer to give the default time set above if the **Employee** exceeds the **X** hours of inactivity.

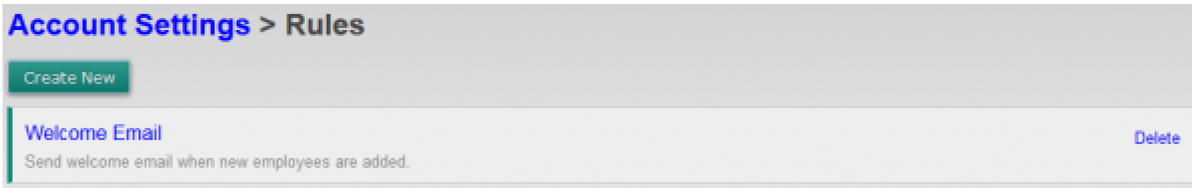
### *Training Courses*

- **Allow employees to sign-in early by X mins** - This sets the start of the time window **Employees** can sign-in before the actual start time of the **Training Course**.
- **Allow employees to sign-out late by X mins** - This sets the end of the time window **Employees** can sign-in after the actual start time of the **Training Course**...
- **Required presence %** - This is the percentage of time the employee must attend the **Training Courses** to receive credit.
- **Overwrite settings of existing courses as some attendance settings can also be defined per training course, if you check this all courses will be overwritten using these values** - Use this check box if you made changes to any of the settings above and want to force them to be used

across the entire **AccuTraining** software. This will overwrite any settings set on the **Training Course** level.

## Rules

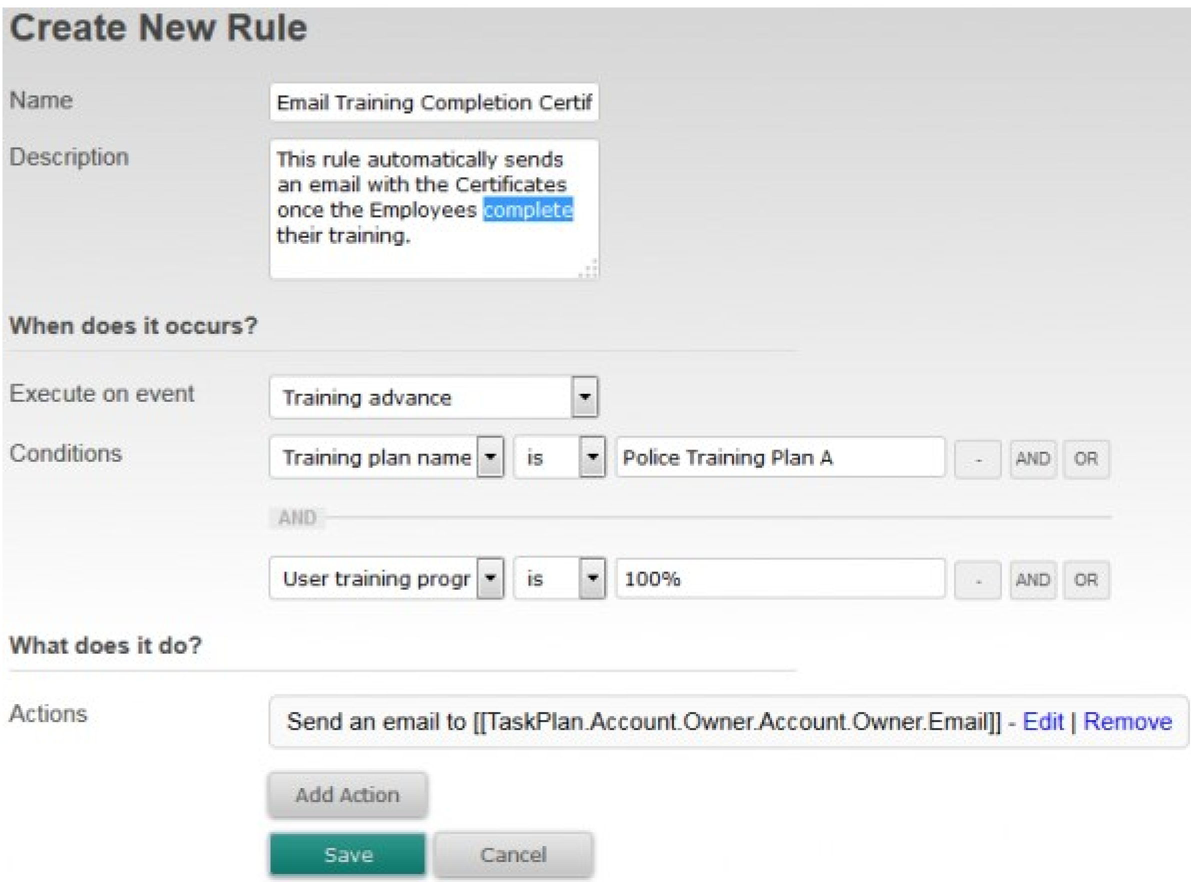
This is a really cool feature that uses a **Rules** engine where you can define events that can do things like sending emails and other system responses based on your requirements. This is recommended only for advanced users.




### *Create New Rule*

Following these steps will create a new rule:

1. Click the **Create New** button to get started.




1. Fill-out the info:

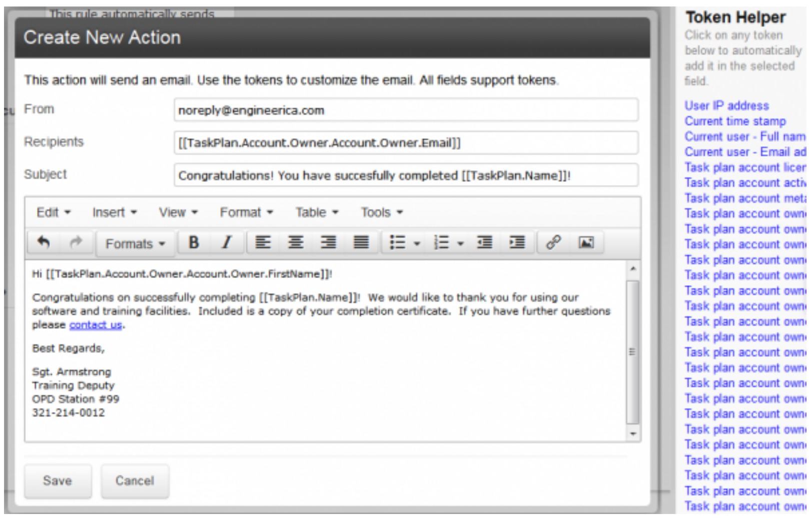
### *General Info*

- **Name** - A simple name so you know what rule it is.
- **Description** - A brief description to further explain the rules function.

### *When does it occur?*

- **Execute on event** - Set this option so the Rule knows when to run.
- **Conditions** - Set this option from a list of conditions.

### *What does it do?*

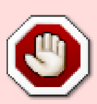
- **Actions** - Add an action to be done once the triggered event occurs.
- **Example:** 


## *Modify a Rule*

Simply click the name of the **Rule** in the list of **Rules** on the **Rules** Screen

## *Delete a Rule*

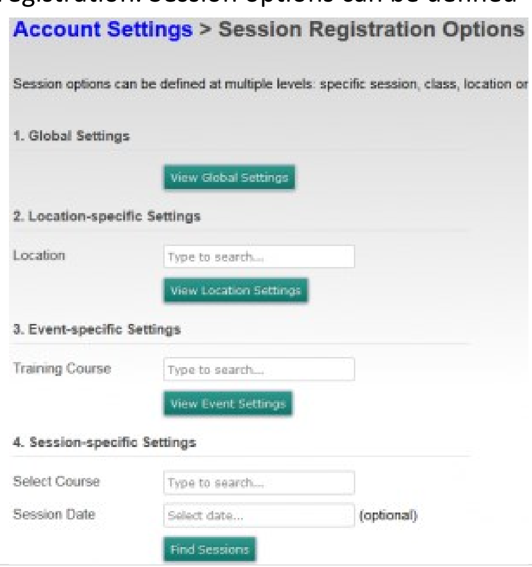
Simply click the Delete link on the far right-side of the **Rule** in the list of **Rules** in the **Rules** Screen.



Be careful not to accidentally delete the rules since they are complex to setup. That is why it is recommended you make sure that this is something you are sure of wanting.

## Session Registration Options

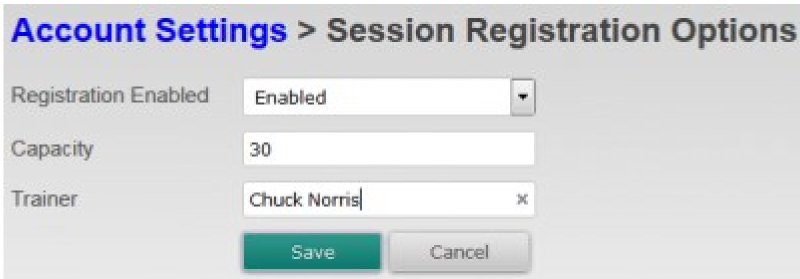
Set room capacity, trainer information, and enable session registration. Session options can be defined at multiple levels: specific **Training Course** session, **Training Course** itself, a **Location** or as a **Global Settings**. The most specific settings defined are used.



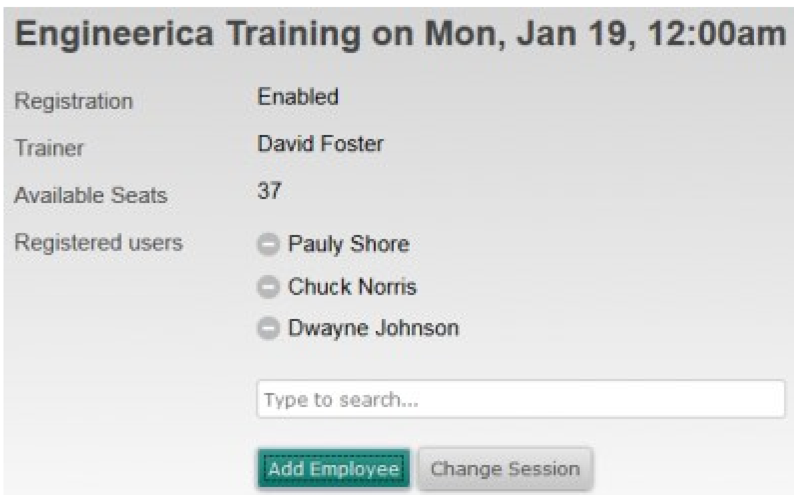

1. **Global Settings** - Use this field to set settings for registration across the account.
2. **Location-specific Settings**
   - **Location** - Use this field to set registration settings based on the chosen **Location**.
3. **Event-specific Settings**
   - **Training Course** - Use this field to set registration settings for a specific **Training Course**.

4. **Session-specific Settings**
    - **Select Course** - Use this field to set registration settings for a specific **Training Course** **AND**
    - **Session Date (optional)** - Use this field to set registration settings for a specific **Training Course** session.

If you choose any of the above options except the last one you will have to define the **Capacity**, **Training Course**, and enable/disable **Session Registration** similar to the following screenshot:




If you choose the last option you will have to define the **Capacity**, **Training Course**, and enable/disable **Session Registration** just for that particular session similar to the following screenshot:




You can also register **Employees** from this screen as well since you are defining the parameters for a specific session of the **Training Course**.

## Translations

Translate or change the terminology used in the system. This area is recommended for only advanced users.


Choose from a list of hundreds of Terminology you can translate to your terms that your institution uses. When you make a change to a certain keyword it will change this throughout the account.

# Tracking Attendance

This information may be easier to read online through the Tracking Options section of the AccuTraining Documentation but is included here to be part of the full manual.

## Tracking Methods:

These are all the attendance tracking methods you can choose from to track your **Employees**.

### Employees Self Sign-in Options

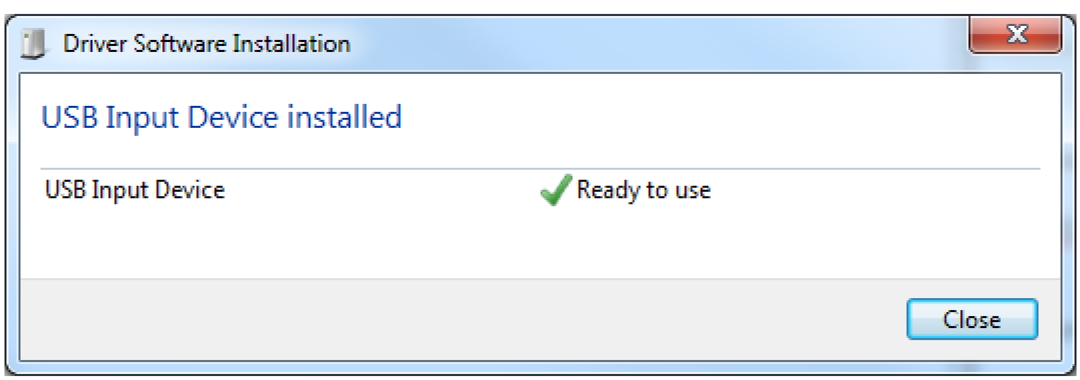
#### *Using a proximity / RFID reader (recommended for large classes)*

First, you will need to order RFID Key Fobs and Proximity Readers for your PC/MAC computer by contacting one of our friendly National Account Specialists at sales@engineerica.com. For more information about what RFID/proximity readers are click here.

Once you receive the RFID/proximity reader it is ready to go. There is no need to store student data on the key fobs as they are already programmed.

1. You will have to connect the proximity reader to your PC/MAC computer and let the device install the necessary drivers.

   Just plug-in the Proximity Reader with the provided USB cord and watch the device install the necessary drivers. It will beep several times during this process.


   You can test that the device is working by opening notepad or word on your computer and then bringing the key fob close to the proximity reader. It should beep and place the ID number.

2. Then you will have to scan each key fob to assign them to each of your students. Here is the article on how to Assign Cards.

   ○

3. Finally, you must setup a Sign-in Station to start recording attendance with the RFID's and proximity readers. Click here to learn how.

### *Using a barcode reader*

First, you will need to order Magnetic Strip Reader/Barcode Readers for your PC/MAC computer by contacting one of our friendly National Account Specialists at sales@engineerica.com or call 1-888-249-7227. For more information about what Magnetic Strip Reader/Barcode Reader models there are click here.

Once you receive your Magnetic Strip Reader or Barcode reader contact our helpful Software Support Team at support@engineerica.com or call 321-214-0012. They will assist with programming your Card Reader using our specialized utilities to get them to read your specific Card ID. You will need to be at your computer with the card reader in order to program the device. Once programmed you can then just plug it into whatever computer you want to be a sign-in station.

Next is getting the Student's Card number into AccuTraining. You can either Import the card numbers or manually assign each students card when they attend the first time so you have their card number in AccuTraining. Here is the article on how to Assign Cards.

The last step is to setup a Sign-in Station. Click here to learn how.

### *Using a magnetic strip reader*

First, you will need to order Magnetic Strip Reader/Barcode Readers for your PC/MAC computer by contacting one of our friendly National Account Specialists at sales@engineerica.com or call 1-888-249-7227. For more information about what Magnetic Strip Reader/Barcode Reader models there are click here.

Once you receive your Magnetic Strip Reader or Barcode reader contact our helpful Software Support Team at support@engineerica.com or call 321-214-0012. They will assist with programming your Card Reader using our specialized utilities to get them to read your specific Card ID. You will need to be at your computer with the card reader in order to program the device. Once programmed you can then just plug it into whatever computer you want to be a sign-in station.

Next is getting the Student's Card number into AccuTraining. You can either Import the card numbers or manually assign each students card when they attend the first time so you have their card number in AccuTraining. Here is the article on how to Assign Cards.

The last step is to setup a Sign-in Station. Click here to learn how.

### *Using a keyboard*

We recommend that you Import your student IDs but you can also add them manually while creating the students if you prefer. Click here to learn about importing students.

All you need to do is setup a Sign-in Station click here to learn how.

Now you just need to have them type their Student ID or Card Number in at the Sign-in Station computer and hit enter. That's it! The students just repeat the process to sign-out when they leave!

### *Using a wall mounted time clock*

Have students sign-in at the time clocks. Learn more by clicking here. For ordering information please contact your national account specialist at 1-888-249-7227 or at sales@engineerica.com

### *Download & Install the AccuTraining Time-Clock Hub*

*Coming Soon!*

### *Using an iPad kiosk*

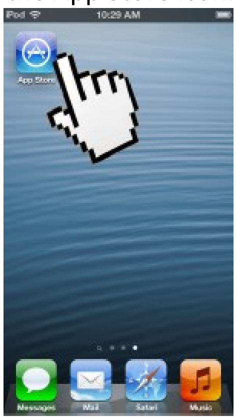
Have the students sign-in by reading a barcode with the iPad's front camera while keeping the device locked to display a classroom's scheduled courses throughout the day in a tamper-free kiosk mode.

## Operator Recording Attendance

### *Using an Apple device*

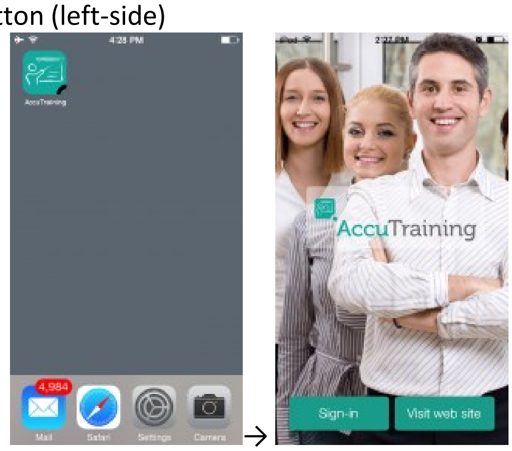
First, you need to download the AccuTraining App from the App Store on your Apple device. It's a free application so no need to worry about additional fees. Here is a link to the AccuTraining app store webpage.

1. Tap the App Store icon.

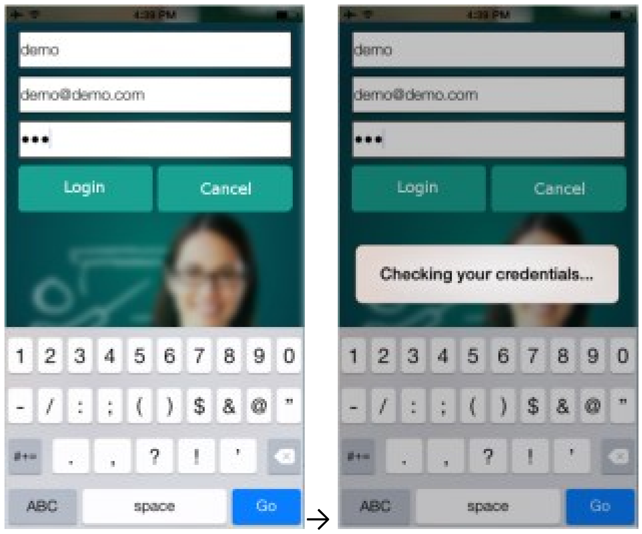


2. In the Search field type AccuTraining and tap search. Tap the cloud icon to download/install.

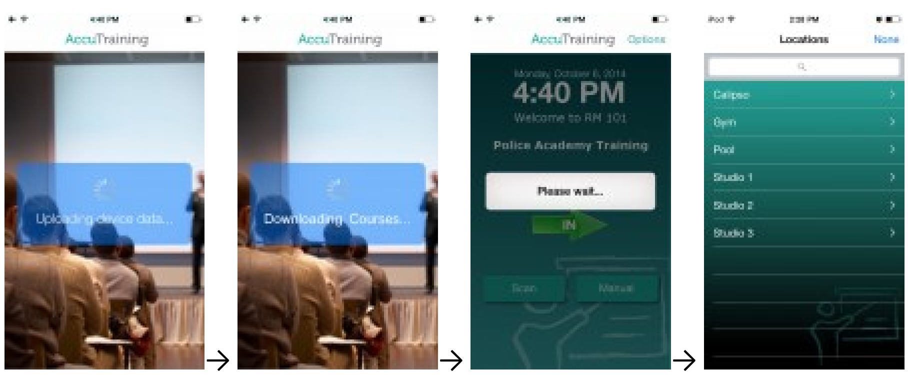

3. Now click open or from the home screen click on the AccuTraining icon and then tap the **Sign-in** Button (left-side)



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.

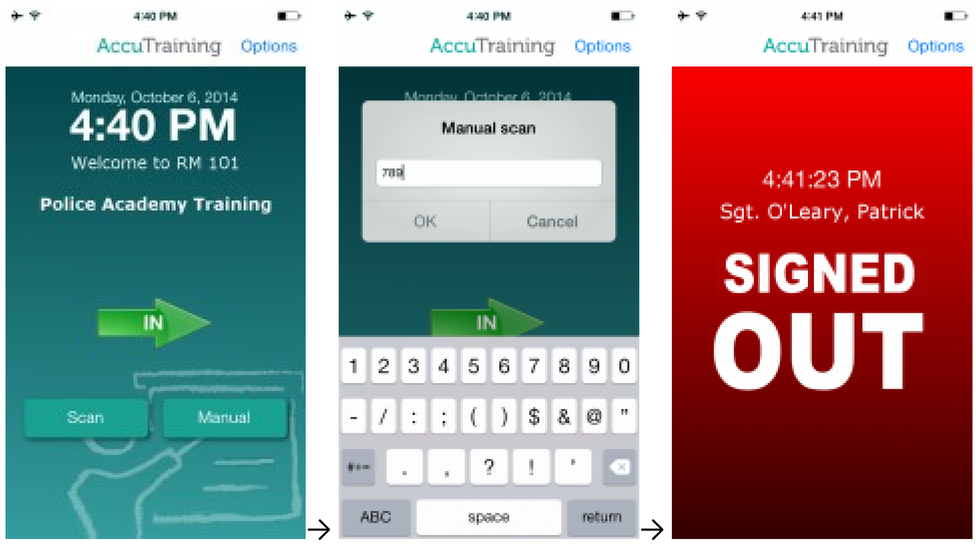



5. Done! The device will sync information and ask what location you want to start tracking.



## *Track Employees Manually*

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.

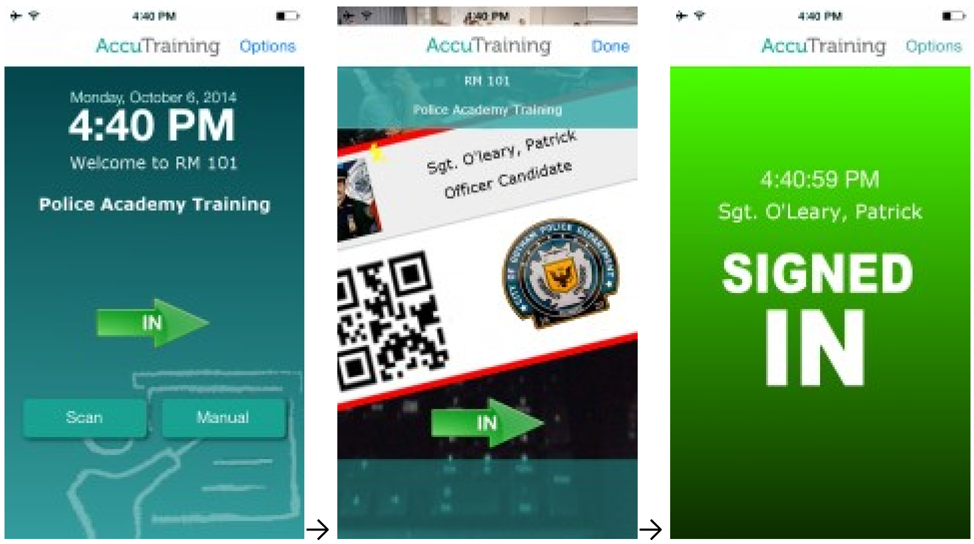



2. Once you tap the Employees ID in your Apple device and tap **OK** it will emit a short high pitched “Beep-beep!” and you will see this green “Signed Out” screen briefly.

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*

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.

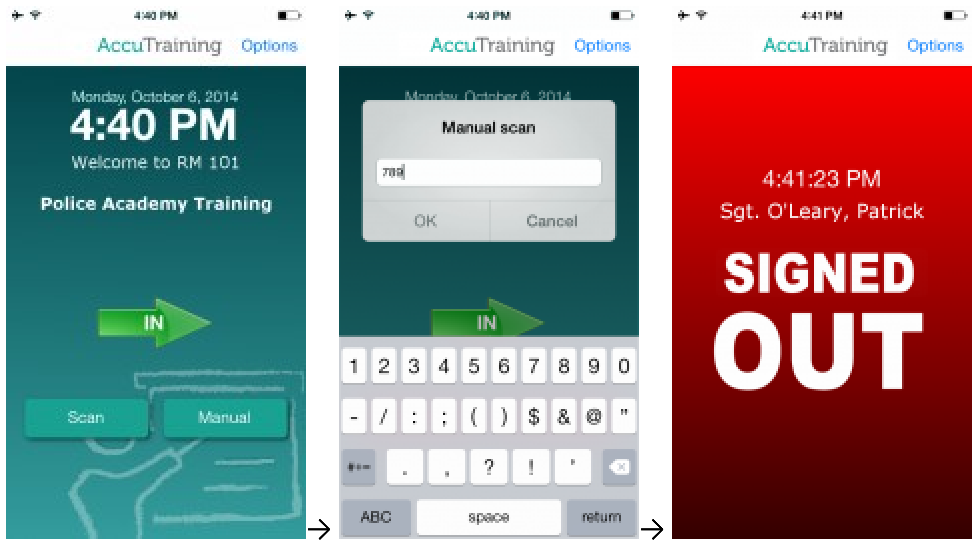



2. Once you scan the barcode or QR code your Apple device will emit a short high pitched "Beep-beep!" and you will see this green "Signed In" screen briefly.

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*

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.



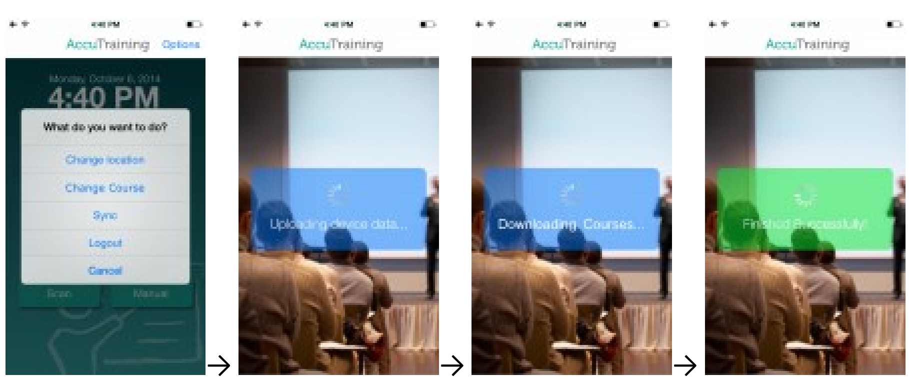

2. Once you swipe the Employees ID in your Apple device it will emit a short high pitched "Beep-beep!" and you will see this green "Signed Out" screen briefly.

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*

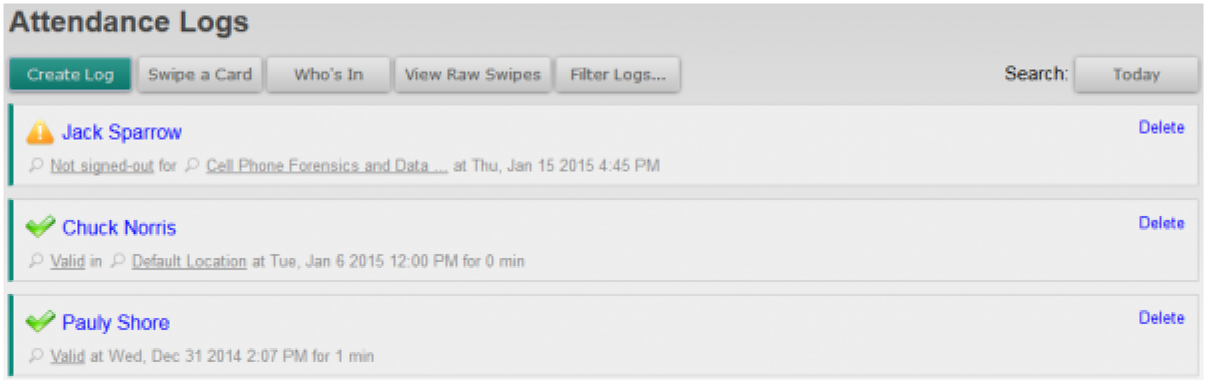
Once you have collected all the Employee's swipes for that session you can upload/sync the data to AccuTraining out on the cloud so admins can see the attendance through the website.

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.

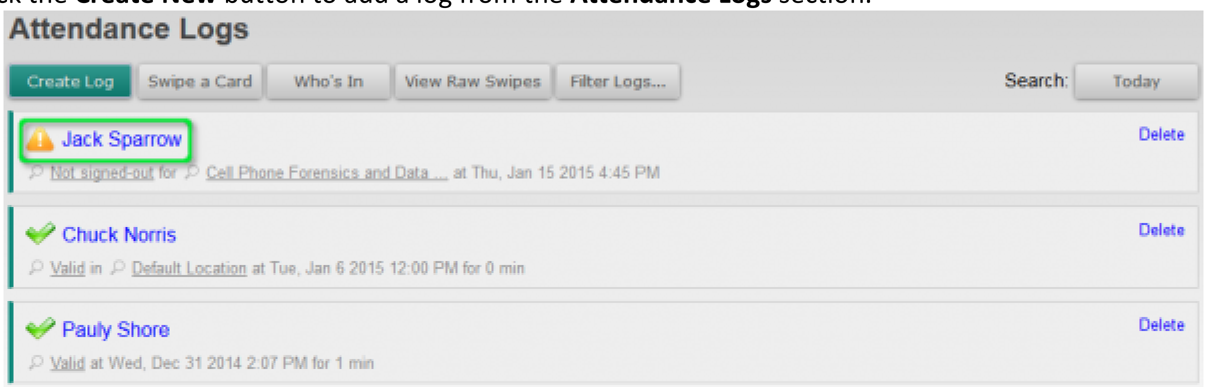


### *Using a computer*

1. From the Home screen when logged in as an Admin or Operator click the **Attendance Logs** link under the **Attendance** section.




2. Now click the **Create New** button to add a log from the **Attendance Logs** section.



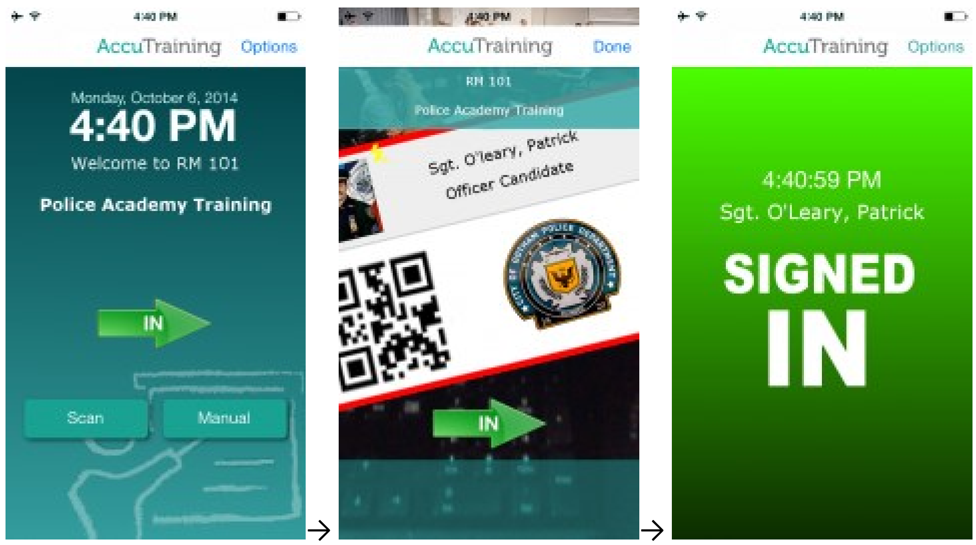

3. Notice you will have to select the Location, Training Course, Employee, and set the sign-in and sign-out times. Once you do click the **Save** button.

To enter the sign-ins and/or sign-outs click the drop-down and select the log type. then make sure you click the green plus symbol at the end of the row to ensure the log time is added.

## Operator Swiping/Scanning Employees

### *Reading the QR code with Apple device camera.*

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.

### *Swiping Employee ID in Apple device using a mag-strip reader*

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.

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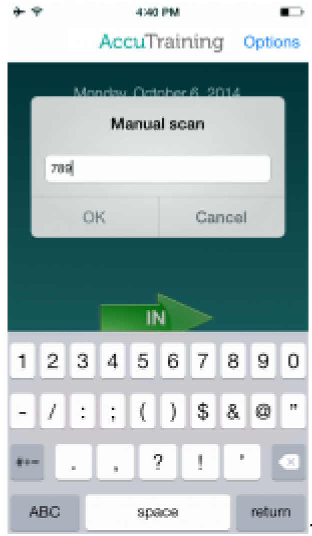
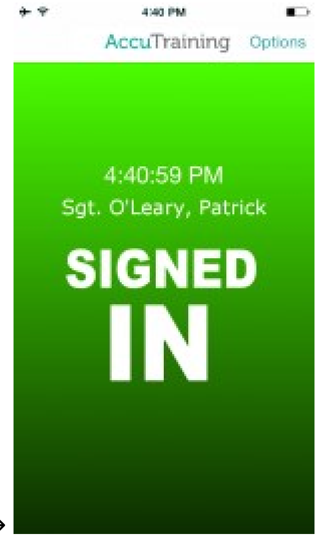
→ 

→ 


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.

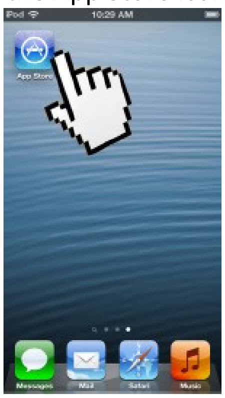
If you hear a low pitched “Deerrrp!” sound emitted from the device you have encountered a misread and simply scan the barcode or QR code again.

## Operator Recording after the session (delayed entry)

### *Using an Apple device*

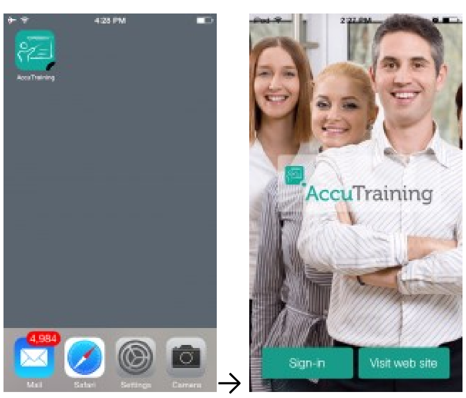
First, you need to download the AccuTraining App from the App Store on your Apple device. It's a free application so no need to worry about additional fees. Here is a link to the AccuTraining app store webpage.

1. Tap the App Store icon.

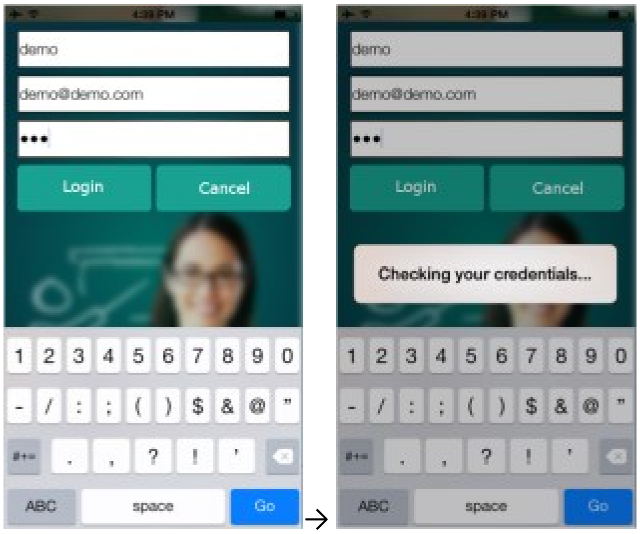


2. In the Search field type AccuTraining and tap search. Tap the cloud icon to download/install.

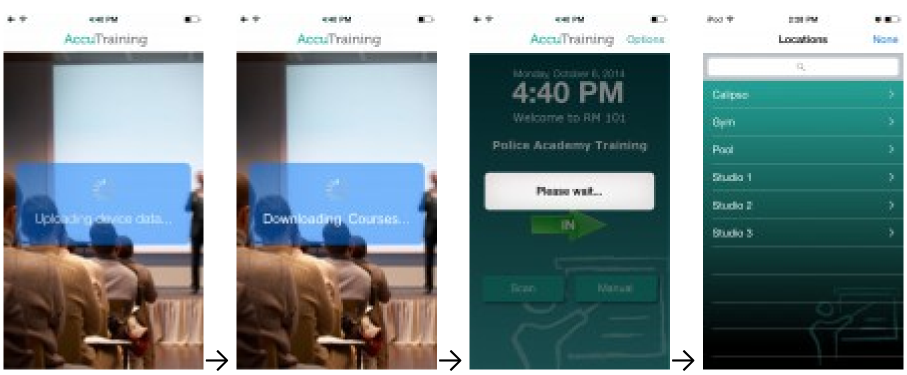

3. Now click open or from the home screen click on the AccuTraining icon and then tap the **Sign-in** Button (left-side)



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.

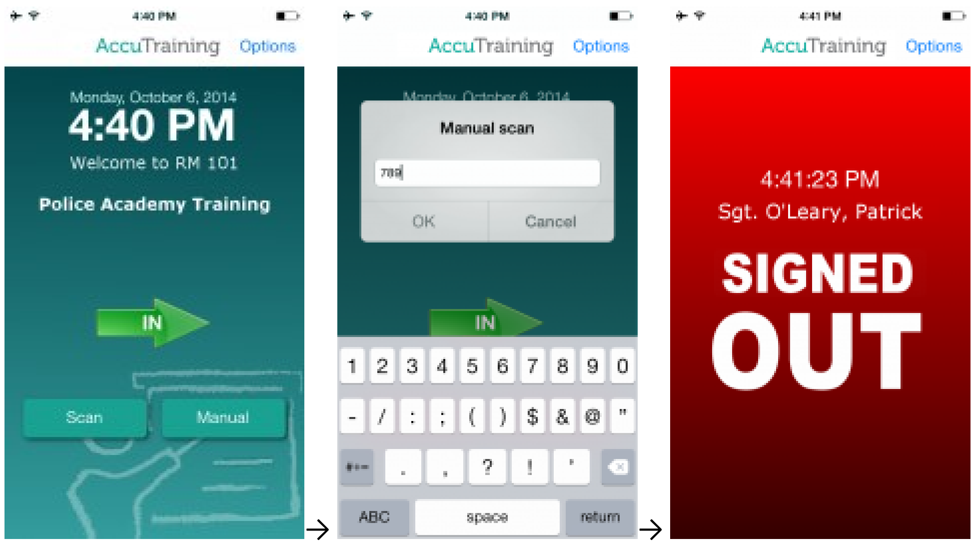



5. Done! The device will sync information and ask what location you want to start tracking.



### *Track Employees Manually*

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.

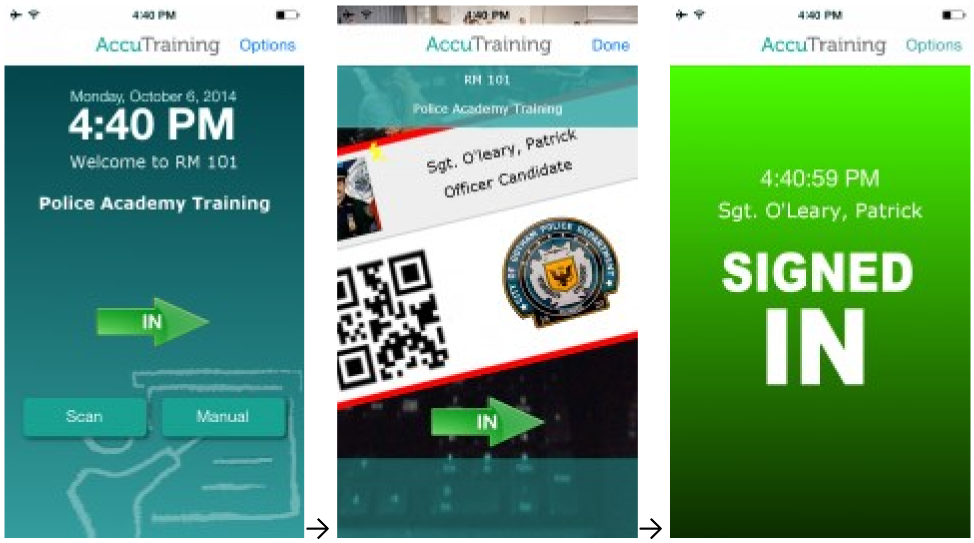



2. Once you tap the Employees ID in your Apple device and tap **OK** it will emit a short high pitched "Beep-beep!" and you will see this green "Signed Out" screen briefly.

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*

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.

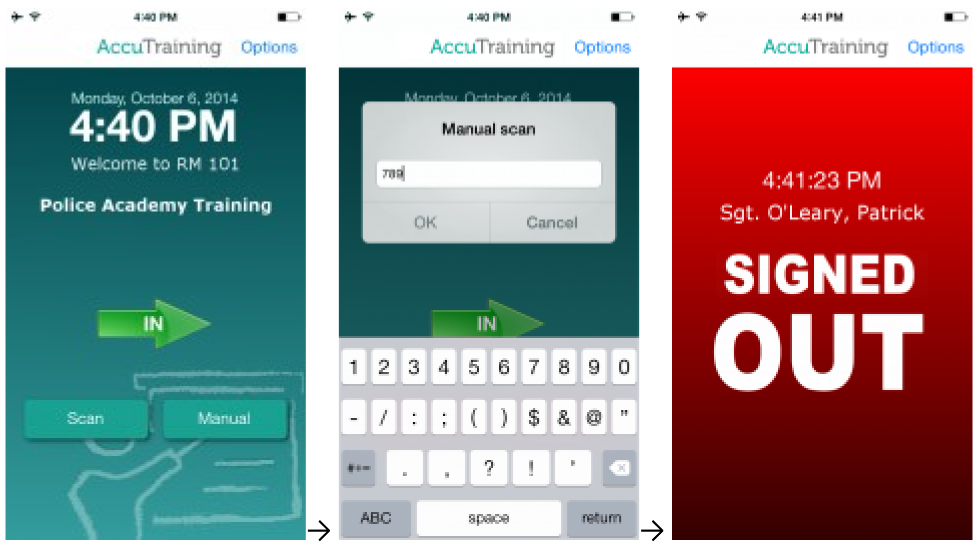



2. Once you scan the barcode or QR code your Apple device will emit a short high pitched "Beep-beep!" and you will see this green "Signed In" screen briefly.

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*

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.



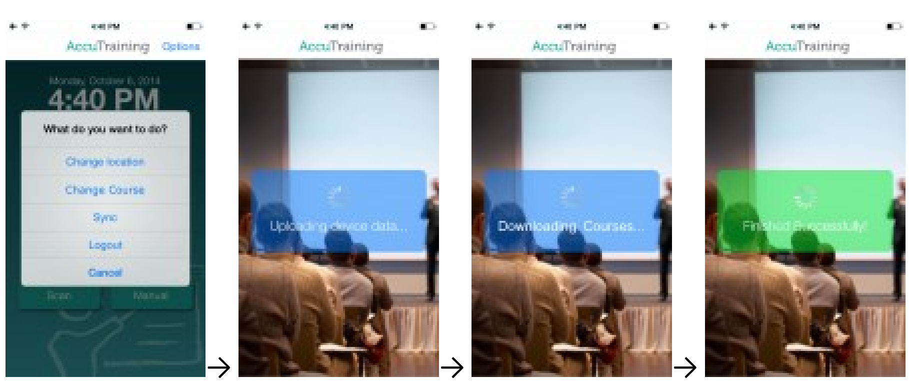

2. Once you swipe the Employees ID in your Apple device it will emit a short high pitched "Beep-beep!" and you will see this green "Signed Out" screen briefly.

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*

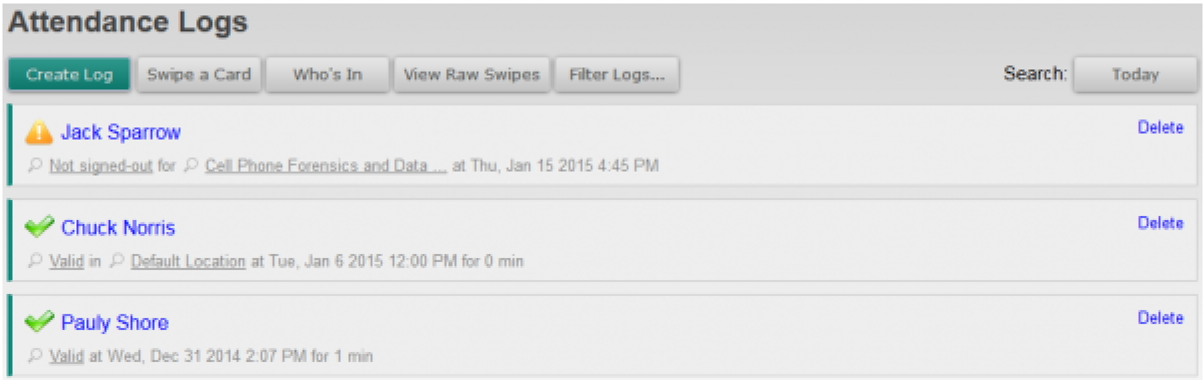
Once you have collected all the Employee's swipes for that session you can upload/sync the data to AccuTraining out on the cloud so admins can see the attendance through the website.

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.



### *Using a computer*

1. From the Home screen when logged in as an Admin or Operator click the **Attendance Logs** link under the **Attendance** section.

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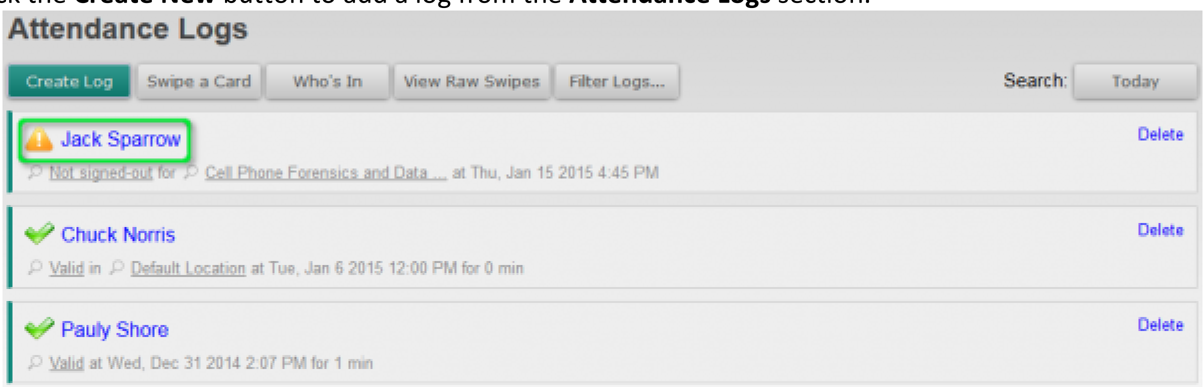
2. Now click the **Create New** button to add a log from the **Attendance Logs** section.




   ○

3. Notice you will have to select the Location, Training Course, Employee, and set the sign-in and sign-out times. Once you do click the **Save** button.

To enter the sign-ins and/or sign-outs click the drop-down and select the log type. then make sure you click the green plus symbol at the end of the row to ensure the log time is added.

## Tracking Devices:

These are all the different devices you can use to track attendance of your **Employees**.

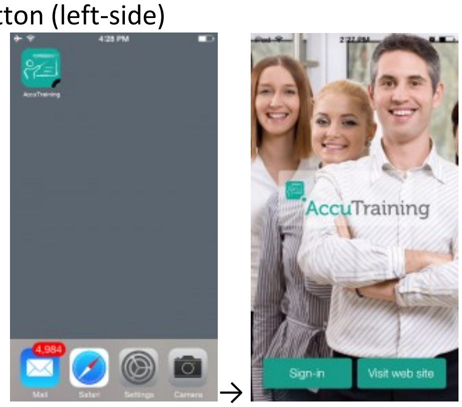
### Apple Devices

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.
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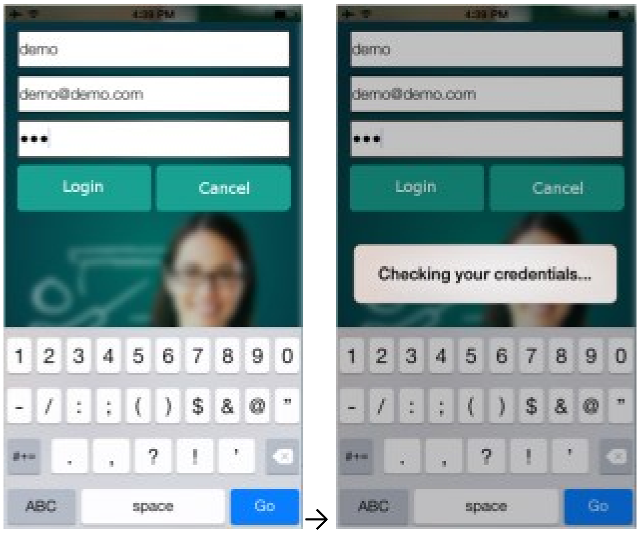


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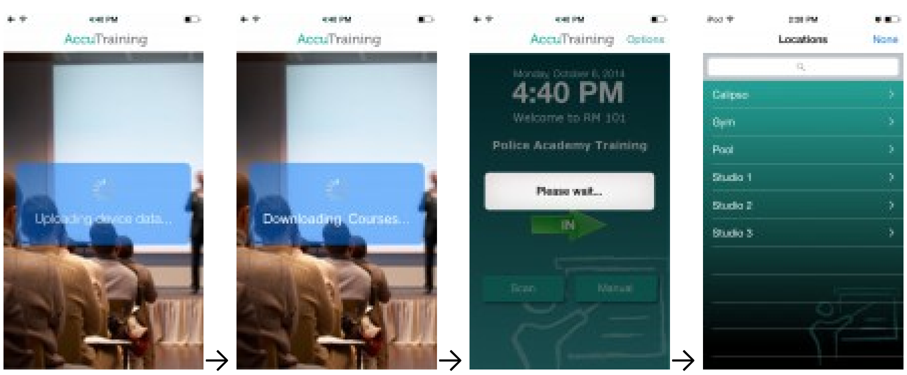

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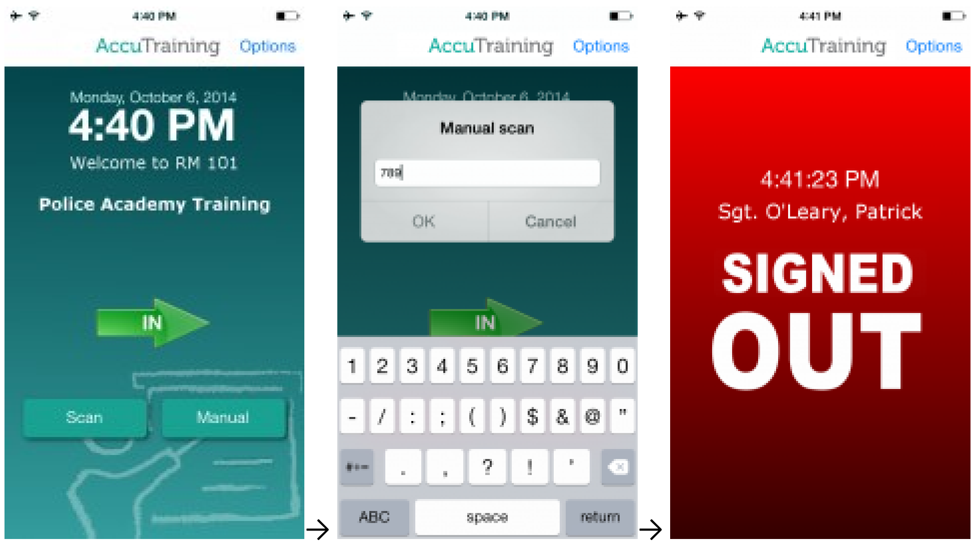


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### *Using a QR barcode with the device's Camera*

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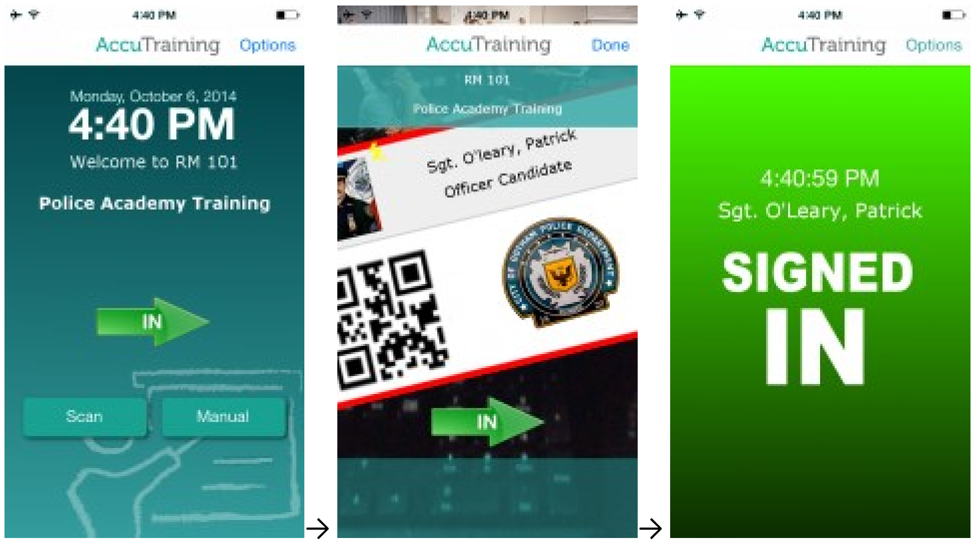


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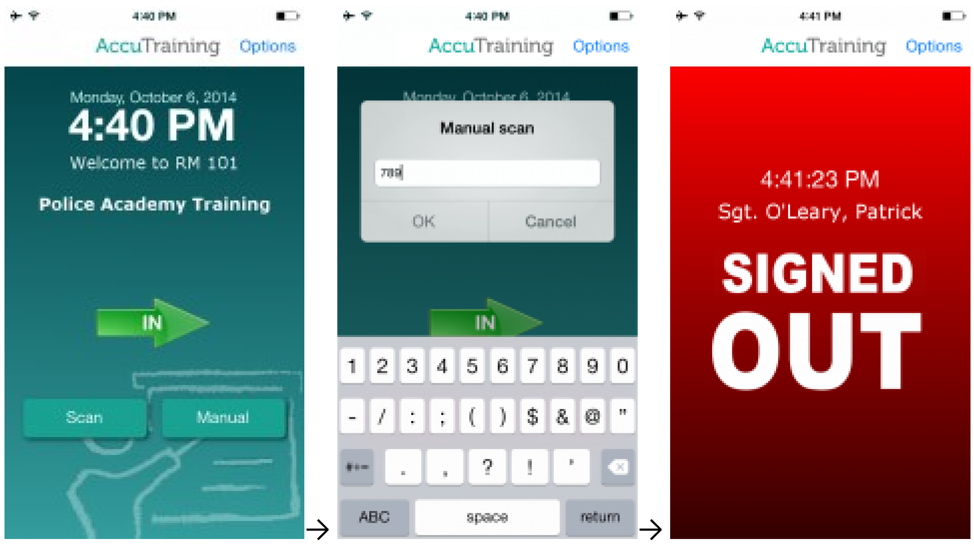
1. After logging into AccuTraining you will see the Sign-in/Sign-out screen. If you want to sign-in someone the arrow will be green simply tap the arrow to turn it red to sign-out someone. Next click the **Manual** button so you can swipe the Employee's card.

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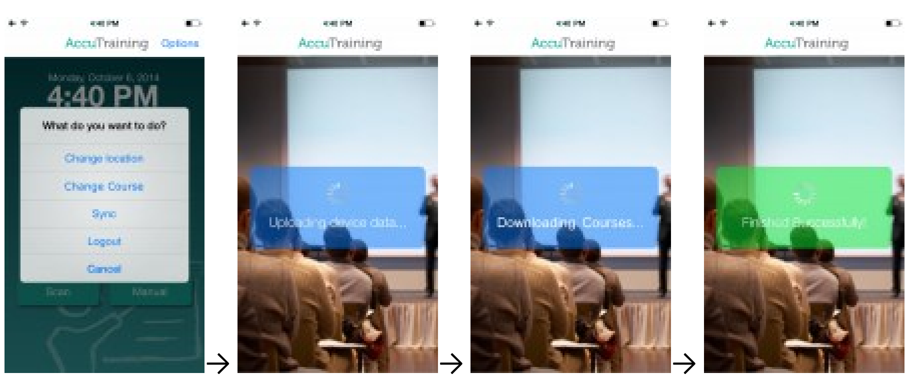


## Computers

These are the options listed below to use a laptop to manage your classroom or institutions attendance.

### *Call the Roll Manually*

Click here to learn to Call Roll in AccuTraining

### *Students using Keyboard Entry*

We recommend that you Import your student IDs but you can also add them manually while creating the students if you prefer. Click here to learn about importing students.

All you need to do is setup a Sign-in Station click here to learn how.

Now you just need to have them type their Student ID or Card Number in at the Sign-in Station computer and hit enter. That's it! The students just repeat the process to sign-out when they leave!

### *Magnetic Strip Reader/Barcode Reader*

First, you will need to order Magnetic Strip Reader/Barcode Readers for your PC/MAC computer by contacting one of our friendly National Account Specialists at sales@engineerica.com or call 1-888-249-7227. For more information about what Magnetic Strip Reader/Barcode Reader models there are click here.

Once you receive your Magnetic Strip Reader or Barcode reader contact our helpful Software Support Team at support@engineerica.com or call 321-214-0012. They will assist with programming your Card Reader using our specialized utilities to get them to read your specific Card ID. You will need to be at your computer with the card reader in order to program the device. Once programmed you can then just plug it into whatever computer you want to be a sign-in station.

Next is getting the Student's Card number into AccuTraining. You can either Import the card numbers or manually assign each students card when they attend the first time so you have their card number in AccuTraining. Here is the article on how to Assign Cards.

The last step is to setup a Sign-in Station. Click here to learn how.

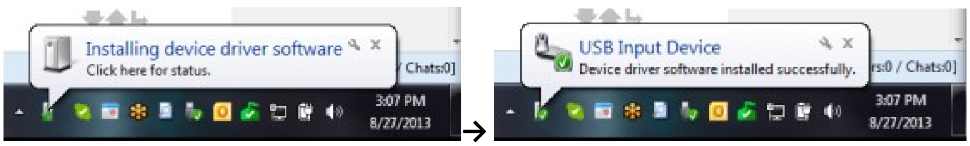
### *Using a RFID/proximity reader*

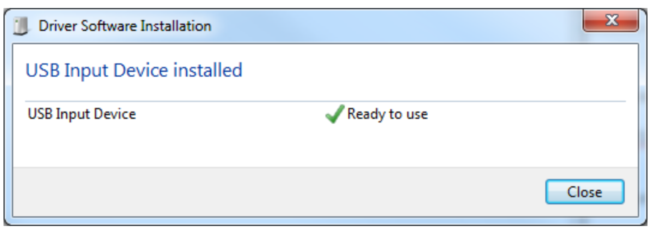
First, you will need to order RFID Key Fobs and Proximity Readers for your PC/MAC computer by contacting one of our friendly National Account Specialists at sales@engineerica.com. For more information about what RFID/proximity readers are click here.

Once you receive the RFID/proximity reader it is ready to go. There is no need to store student data on the key fobs as they are already programmed.

1. You will have to connect the proximity reader to your PC/MAC computer and let the device install the necessary drivers.

   Just plug-in the Proximity Reader with the provided USB cord and watch the device install the necessary drivers. It will beep several times during this process.

   You can test that the device is working by opening notepad or word on your computer and then bringing the key fob close to the proximity reader. It should beep and place the ID number.

2. Then you will have to scan each key fob to assign them to each of your students. Here is the article on how to Assign Cards.

3. Finally, you must setup a Sign-in Station to start recording attendance with the RFID's and proximity readers. Click here to learn how.

### *Time-Clocks*

Have students sign-in at the time clocks. Learn more by clicking here. For ordering information please contact your national account specialist at 1-888-249-7227 or at sales@engineerica.com

#### *Download & Install the AccuTraining Time-Clock Hub*

*Coming Soon!*

### Wall-mounted iPads

Have the students sign-in by reading a barcode with the iPad's front camera while keeping the device locked to display a classroom's scheduled courses through out the day in a tamper-free kiosk mode.

*Coming Soon!*