Trac 4.0

User Guide

V4.0

Welcome

Welcome to Version 4.0 of the TutorTrac, AdvisorTrac, FitnessTrac, and LabTrac systems. Version 4.0 has brought the family of "Trac" products back together in a single interfaced system, but each product still maintains its own identity. For the purposes of teaching and training, the 4 products may be commonly referred to as the Trac system or Trac product. By bringing the separate products to a single interface, you may now enjoy more effective communication and collaboration with your peers while keeping sensitive data private and secure.

FitnessTrac was the first application in the Trac product line. Developed and introduced in 1992, it quickly became a vital tool for the colleges in the Maricopa County Community College District (MCCCD) in Arizona. The original version was Server-Client software that provided the users with a much-needed ability to track student activity in the college fitness centers and quickly obtain accurate and meaningful reports. After a few years of many feature developments and enhancements, similar needs to efficiently track student activity arose in the learning centers in the district. Upon discovering that a learning center in the district was attempting to utilize FitnessTrac, Kelly Corder (Developer and Owner of Redrock Software Corporation) developed the TutorTrac system to meet an entirely new set of needs presented by learning centers. In 2000, the FitnessTrac and TutorTrac products were re-developed as completely web-based applications. AdvisorTrac soon followed to accommodate advising and counseling centers and LabTrac for the computer labs. Version 3.0 was released in 2005 and the Trac products have continued to become incredibly more capable with each new release. After 4 years, the growth of the Trac products required a rewrite to continue providing new enhancements, so 4.0 was planned and developed.

We are very excited for the 4.0 release and the system capabilities that are now available to you! Be prepared - there is a learning curve to becoming familiar with the system and how it operates, but the system is quite amazing.

Have fun learning the new system and don't hesitate to contact Redrock Support team with any questions!

Support@Go-Redrock.com

480-752-8533 Ext 201

Table of Contents

Chapter 1: Introduction to Trac 4.0

The Trac 4.0 system allows all departments and offices working directly with your students to work collaboratively and track the student activities across tutoring, advising, computer labs, and fitness centers. You may work with several of these areas of student activity, or just a single component. The Trac 4.0 system assists you with handling this information through profiles that are directed at specific areas of the student activity at your college or university. The profiles (AdvisorTrac, FitnessTrac, LabTrac, and TutorTrac) will each operate in a slightly different manner, geared toward the appropriate type of student interaction.

TutorTrac is directed toward tracking the student activity in the tutoring and learning support departments. AdvisorTrac tracks the student activity in the advising and counseling departments. FitnessTrac will track the student activity in the college/university fitness or wellness center(s). LabTrac is utilized to track the student usage of the computer labs across your college/university.

In addition to the profiles, additional modules may be added to your Trac 4.0 system to add new features and enhance the capabilities of your system. The SAGE Early Warning module will allow your faculty to submit referrals, progress reports, or evaluations for the students in their courses. The SurveyTrac module enables surveys to be created and delivered manually or automatically to the users through the Trac 4.0 application. The Whiteboard module provides an online interface with interactive chat, drawing area, and documents for your consultants to meet with your students. Text Message Alerts allow students to opt in to receive notifications via Text. Finally, the Mobileview Module allows your Trac system to be compatible with Mobile Phones or Tablets.

While each profile and module provides a standard user experience, a majority of the settings within each system is customized to your needs. There are global level settings to your Trac 4.0 application that are shared by all users within all profiles. Each profile also contains its specific profile level settings to affect the user experience within the individual profile. There are group level settings as well to control which users and consultants will have which level of access throughout the profiles and the Trac 4.0 system. And finally, there are individual level settings that do not control access, but allow for some customization of the user experience within the Trac 4.0 application.

This User Guide is developed to provide you with the details and specifications of the many areas of the Trac 4.0 system. Use the Quick Start Guide and the Redrock Wiki site (http://wiki.go-redrock.com) for step-by-step procedures and frequently asked questions.

Definition of Terms

Center Profile

Commonly referred to as a Profile, the Center Profile contains the settings, preferences, and rules that govern how specific centers and users operate within the Trac system. A single profile is included with a Trac Product license. Additional profiles may be purchased through Sales@GoRedrock.com to allow for centers and users to operate with a different set of settings and preferences.

Subcenters

You can create an unlimited number of subcenters within your Center Profile. A subcenter could represent a physical center, department, unit, or any other division that you might need to separate activities, users, consultants, schedules, and visits.

Groups

Groups define a specific set of privileges that are shared by a group of users and/or consultants. Each group can have unique privileges to access centers, students, visits, schedules, and other information. An unlimited number of groups can be created to separate privileges and access levels.

Users

Users are members of the staff that are not consultants. Users may be administrator-level, front desk or student workers, office assistants, or other staff members that may need to access your Trac system.

Users are created through the Groups Entry. An unlimited number of users can be created within each group. A user may be moved from one group to another to change their privileges.

Faculty

Course instructors assigned to student registrations.

Consultants

Consultants are the tutors, advisors, counselors, and staff members that meet with students.

Students

Students are the individuals that utilize the services offered at your center(s).

Sys Admin

The Sys Admin is the highest level of Group Access. The users in the Sys Admin Group will be able to control and set up the entire application and all Center Profiles.

Visit

A visit is a record of a student spending time using the services offered in your center. Recording visits are essential to providing accurate data of the students that have utilized the services offered. Visit Data typically includes the Total Number of students who have made a visit, Total number of visits made by students, the Subject and Reason for their visit, Visit Notes (any notes entered by Consultant or student), and which Consultant they saw during their visit to your Center.

Drop-In Visit

A drop-in visit is a record that was not scheduled, but occurred when the student showed up and utilized services without advance notice.

Availability

An availability is an appointed time that a consultant offers for student appointments or drop-in visits.

Appointment

Record that a student reserved a time to meet with a consultant. An appointment may be assigned a status to identify the outcome of the reserved time.

Appointment Status

Value assigned to an appointment to identify the outcome of the appointment. Appointment Status choices are entered through the Center Profile Preferences.

Supplemental Instruction (SI)

Supplemental Instruction program developed at UMKC that offers peer-led sessions to students registered in specific sections. An SI report compares the grades of the students that participated in the SI program with those that did not participate.

Trac Navigation

The menu and search bar found in the upper-left corner of each page. It is the main source of searching and navigating the Trac system.

TracMan Icon

The TracMan Icon is the image of the Trac symbol that links to the primary menu on the Trac Navigation.

Center Status

Center Status is highly dependent on the scheduling parameters set for your Trac system. If max missed appointment rules are set, for example as two max missed appointments per month, a student's Center status might be changed to BANNED or NCNS (no call no show) if said student misses two appointments in a week. Students with a special Center Status can then be prevented from booking further appointments.

Section Specialties

If a Consultant specializes in any courses that students are enrolled in, you can indicate which sections they are able to hold sessions in by assigning Section Specialties to the Consultant. Section Specialties

determine which availabilities or appointments will appear when students or users select a subject in a search for availability.

Reason Specialties

If a Consultant specializes in any reasons that students may come visit your center for, for example Changing Major or FAFSA applications, you can indicate which reasons they are able to hold sessions for by assigning Reason Specialties to the Consultant. Reason Specialties determine which availabilities or appointments will appear when students or users select a reason in a search for availability.

iCal Attachment

The iCal attachment allows appointments to be posted to an Outlook calendar when an email is received confirming the appointment that was scheduled. If the iCal attachments are utilized, then the appointments will appear on your Outlook calendar when they are scheduled in the Trac system.

Chapter 2: Installation and Server Options

Installing your Trac Application

The Trac application is very easy to install. The Trac application is completely self-contained and the database and application are installed to the same folder. The Trac application can run on any Windows Operating System 2003 or newer and on any Mac OS X up to Snow Leopard. Your server should have a minimum 1GB RAM and 4-10GB Hard Disk space. Your installation footprint will be much smaller, but you want to account for data file backups, data import files, archives of log files, long-term growth of your data file, and file attachments.

Server Requirements

- Windows Server 2003, Server 2008, or Windows 7
- ▫Mac OS X up to Snow Leopard, not compatible with Lion or Mountain Lion
- ▫Minimum 2.4 GHz processor, 3.0 GHz 64-bit processor or better recommended
- ▫Minimum 1 GB RAM, 2 GB recommended
- ▫Minimum 4 GB Hard Disk space, 10 GB recommended
- ▫Static IP Address

Installation Code

The Installation Code for your Trac application is generated for your unique installation. The code is partly based on your IP Address. The IP Address of the server MUST remain static for your installation code to remain valid and for your Trac application to continue to run.

Internal or External IP Address

The application can run off of an internal or external IP address, however, the type of access that is required will typically determine the address and domain where the Trac application is installed. If the application is not available off-campus, then students will not be able to schedule online appointments and staff will not be able to check information and run reports from anywhere.

Customizing the URL or Domain Name

All users access the Trac application through a web browser. By default, the URL will simply be the IP Address of the server (i.e. http://172.0.0.1) and the users will need to remember the IP Address or bookmark the address. Most will prefer to set up a DNS to access the site, such as http://trac.college.edu.
The DNS is set up with the Network Administrators at your college or university.

Backup and Restoration

It is recommended that a daily backup be made of the Trac data file. This process may be handled by our campus' own software. There is a single data file that needs to be backed up and is found in your installation directory. If necessary, all of the Trac application files other than the data file may be reinstalled from CD or via download.

Moving to a New Server: Server Migration

Moving the application from one server machine to another is a simple operation. Simply move the entire Trac application directory from the original server machine to the new server machine. Then change the IP Address of the new machine to the old server's IP Address (in order for the Installation code and software license to be valid). If your Server IP Address is changed, then your installation code will be deactivated and Redrock Software will generate a new code for the new server.

REDROCK SOFTWARE CORPORATION IS NOT LIABLE FOR LOSS OF DATA FOR ANY REASON.

Windows Installation

You may install your Trac application on a PC running the following Windows operating systems:
- *Server 2003*
- *Server 2003 64-bit*
- *Vista*
- *Vista 64-bit*
- *Server 2008*
- *Server 2008 64-bit*
- *Windows 7*
- *Windows 7 64-bit*

On a Windows Operating System, simply insert the CD and it should automatically install your Trac application. If the installation does not occur automatically, then open the CD and execute the application on your CD called "setup.exe".

Your Trac application will install on the C: drive. Dependent upon which primary Profile you purchased, it may be installed in a folder called AdvisorTrac, FitnessTrac, LabTrac, or TutorTrac. After your Trac application is installed, the setup application will attempt to run the application named Advisor.exe, Fitness.exe, LabTrac.exe, TutorTrac.exe, or TracApp.exe. When your Trac application runs, it will require the installation code to activate your product. The Installation Code is unique to your system and generated from your Product ID and your server IP Address. The server MUST have a static IP Address to install your Trac application. You may receive your installation code by emailing your Product ID (see CD case) and your static Server IP Address to support@go-redrock.com.

Changing the Installation Directory

You can move your installation to another directory or folder on your Windows server if you do not want it to run directly from the C: drive. Just follow the steps below to move the Trac installation folder and application. Because the application does not install registry keys, it can simply be moved on the server.
- Quit the application by clicking the Quit button
- Move the entire Trac application directory to another location on the server
- Delete the All Users 4D folder
  - Server 2003 and older – C:\Documents and Settings\All Users\Application Data\4D
  - Vista – C:\Users\All Users\4D
  - Windows 7, Server 2008, and new - C:\ProgramData\4D
- Start the Trac application from the new location

Trac Application Does NOT Run

You may have difficulty running the Trac application, dependent upon your server settings. Beginning with
Windows Server 2003 R2, Microsoft enabled DEP (Data Execution Prevention) protocols to help control which applications are running on your server. This prevents unknown applications from running automatically until you specify an application as an exception. The Redrock Wiki site has more information for setting the DEP exceptions to allow your Trac application to run on your server.

http://wiki.go-redrock.com/index.php/Data_Execution_Prevention_%28DEP%29

Running your Trac Application as a Service

The Trac application does not install or run as a service by default. The application must be run by a user and the user must remain logged in on the server. To install the Trac application as a service, we recommend using a 3rd party application or a utility called WinServ. See the Redrock Wiki Site for more information on installing your Trac application as a service.

http://wiki.go-redrock.com/wiki/Service

You should not use the Windows Startup folder to start the Trac application automatically when signed in. Your Trac application can only be run once because the application serves the web pages and accesses a single database file. You cannot have two competing web servers on the same IP/Port and

you cannot have the database file accessed by two applications simultaneously. Use the method above to install your application as a service to start the Trac application automatically.

Internet Information Services

The Trac application does not use IIS to serve the web site. You do not need to install IIS on the server for the Trac application. If the Trac application is installed on a server that also runs other web pages from
IIS, then you will need to set up IIS and the Trac application to not interfere with each other. By default, all web server applications serve on port 80. The Trac application may be modified to serve on a different port in order to allow IIS to serve on port 80.

To change the served port, open the file Prefs.INI that is located in the Trac application directory. You can use WordPad or Notepad to edit the Prefs.INI file. Locate ServerPort=80. Change 80 to 81 to serve the Trac application on port 81. Restart the Trac application and it will now be serving its web pages on port
81 (or another specified port).

SSL Encryption

Your Trac system may secured with SSL protocols to encrypt all web traffic to your site. This is recommended for all systems that will be available off-campus in order to protect your sensitive information. See the Redrock Wiki Site for more information on using SSL encryption to secure your Trac system.

http://wiki.go-redrock.com/wiki/Stunnel

Macintosh Installation

You may install your Trac application on a Macintosh running the following Mac OS X operating system:

- OS X 10.0 Cheetah
- OS X 10.1 Puma
- OS X 10.2 Jaguar
- OS X 10.3 Panther
- OS X 10.4 Tiger
- OS X 10.5 Leopard
- OS X 10.6 Snow Leopard

On a Mac system, simply insert the CD and open the disc image. Create a folder for your primary Trac application (AdvisorTrac, FitnessTrac, LabTrac, or TutorTrac) in your Applications. Then copy the contents of the CD to the new Trac folder.

Dependent upon which primary Profile you purchased, your application package may be named Advisor.app, Fitness.app, LabTrac.app, TutorTrac.app, or TracApp.app. When your Trac application is run for the first time, it will require the installation code to activate your product. The Installation Code is unique to your system and generated from your Product ID and your server IP Address. The server MUST have a static IP Address to install your Trac application. You may receive your installation

code by emailing your Product ID (see CD case) and your static Server IP Address to support@go-redrock.com.

Apache Web Server

The Trac application does not use Apache to serve the web site. You do not need to install Apache on the server for the Trac application; however, Apache is installed by default on many Mac OS X systems. You will need to set up Apache and the Trac application to not interfere with each other. By default, all web server applications serve on port 80. The Trac application may be modified to serve on a different port in order to allow Apache to serve on port 80.

To change the served port, open the file Prefs.INI that is located in the Trac application directory. You can use TextEdit to edit the Prefs.INI file. Locate ServerPort=80. Change 80 to 20000 to serve the Trac application on port 20000. Restart the Trac application and it will now be serving its web pages on port 20000 (or another specified port).

Chapter 3: Setup / Prefs

Logging in to Trac 4.0

You will access your Trac 4.0 application through a web browser. As a web-based application, your entire user experience will be through a web browser such as Firefox, Safari, Internet Explorer, or Google Chrome. For the best experience, we recommend using Firefox 10 and higher or Safari 4 and higher. The Trac 4.0 system is compatible with Internet Explorer 8 and 9; however, the IE browser experience is quirky in some of the administrative sections.

The URL or Web address to access your Trac system is http://ipaddress/tracweb40/default.html where the "ipaddress" is the address of your server. It might be an actual IP Address, such as 192.168.0.10, or it might be set up with a DNS on your network, such as trac.college.edu. So, you might access through an address such as http://192.168.0.10/tracweb40/default.html or http://trac.college.edu/tracweb40/default.html.

Go to your Trac 4.0 site. Log in with the default SysAdmin account provided with your installation. Contact Support@Go-Redrock.com for your account password.

Note: If you are upgrading from a previous version, you can still log in to the Trac system with your username and password, however, your account might not be associated with the full Sys Admin Group.

Setting up your Trac system

When you log in for the first time, your Main Menu will not contain much information or direction. In the upper-left corner of the screen, you have the Trac Navigation menu and search options. In the Main Menu window, you will have a large blank area (you can add messages and instructions here later). Now that we are logged in, let's go through some of the essential settings. Because the Trac system has levels of settings and privileges, we will find these settings in a few different areas on the program.

UTILITIES AND PREFS
The first area of settings is found in the Utilities and Prefs. The Utilities and Prefs contains the System Prefs, Advanced Prefs, LDAP Tool, Email Tool, and Automated Events. These are system-wide settings that are applied to the Trac system regardless of Center Profile, Subcenter, or Group. Because these settings have global implications, they are accessible only to the Sys Admin Group. A user in the Sys Admin Group can access the Utilities and Prefs... from the Trac Navigation Menu. Click on the TracMan Icon on the left side of the Trac Navigation Menu and select Utilities and Prefs...

CENTER PROFILE PREFS
The second area of settings is found in the Center Profile. The Center Profile(s) are only accessible to users in groups with Center Admin level privileges. The Center Profile contains preferences specific to the Center Profile and its related Groups, Users, and Consultants. Because these settings have Profile-wide implications, the Center Profile Entry is only accessible to Center Admin and Sys Admin Groups. Move your cursor to the Trac Navigation Menu and mouse over the search glass in the search bar. Select Centers to access a listing of all Center Profiles. Click on a Center Profile to access the Center Profile Entry screens.

GROUP ACCESS PREFS
The third area of settings is found in the Groups Entry. The Groups Entry is accessed through the Center Profile and contains settings that apply to the Groups operating within a Center Profile. Because of these Profile-wide implications, the Groups Entry is only accessible to Center Admin and Sys Admin Groups. To access the Groups Entry, first navigate to a Center Profile Entry. The second tab in the Center Profile Entry screens is the Group Access tab. Click on this tab to assign privileges to Groups within this Center.
From the Group Access tab, you can click on the Group name to open the Groups Entry window. The Groups Entry allows you to create the Users that are a part of the group and then enter the specific privileges these users will share within the Trac system.

MY PREFS
The fourth area of settings involves the personal preferences that users can choose to customize the Trac system for themselves. The My Prefs menu is also found from the Trac Navigation Menu. Click on the TracMan Icon and select My Prefs. The My Prefs options include adding some Widgets to the Main Menu, such as a Mini Log Listing, Reports, custom window colors, Weekly Tip, and a custom RSS news feed. The user's ability to enable some of these preferences is dependent upon the access provided them through their assigned Group.

Utilities & Prefs - System Preferences

The first area of settings is found in the Utilities and Prefs. The Utilities and Prefs contains the System Prefs, Advanced Prefs, LDAP Tool, Email Tool, and Automated Events. These are system-wide settings that are applied to the Trac system regardless of Center Profile, Subcenter, or Group. Because these settings have global implications, they are accessible only to the Sys Admin Group. A user in the Sys Admin Group can access the Utilities and Prefs... from the Trac Navigation Menu.

To get to your Utilities & Prefs, click on the TracMan Icon on the left side of the Trac Navigation. Click Utilities & Prefs. Select the System Prefs Tab.

The System Preferences are accessible to the Sys Admin users for setting up global settings for the entire system. These are system-wide settings that control the Trac system regardless of Center Profile, Subcenter or Group.

System Prefs

defaultProfile
The defaultProfile setting determines what profile view will be displayed for the Default Login Screen, the Students, and the Faculty that use your Trac system. The Default Login Screen is the same for all Center Profiles and Subcenters within your Trac application, so the defaultProfile sets the view for the screen.
The Students and Faculty are not created within a profile so they are not related to a specific profile and need this setting to determine what profile view they will see.

DNSServer
The DNSServer setting is used to set up your Trac application to act as an mail server and send email on its own without a college or university mail server. Using the college or university mail server is the preferred method of sending emails from your Trac application.

LOGACT
The LOGACT setting enables an action log on the appointments screen. This log shows when the appointment was saved and when any changes were made to the appointment.

LOGMODS
The LOGMODS setting enables a detailed server log that records each action on the server. This is a useful tool that helps diagnose issues or to determine which users have performed which functions. However, it is also impacts performance because it creates a large log file that the server must continually write to for every action performed.

Mail Settings
The Mail Settings preference contains several important configuration options in regards to email capabilities of your Trac system. The Mail Server Address can be set here, as well as your mail server Email Address. You can choose to send emails for missed appointments as well as emails for Terminated Visits (See Center Profile Prefs: Log in/Out – Auto Terminate).

MAILSERVER
The MAILSERVER setting enables your Trac application to use your college or university mail server to send emails. This is the preferred method to send emails from your Trac application. Your mail server

must be set up to accept anonymous mail relay from the Trac server in order to use the MAILSERVER function. This may be an IP Address or a DNS assigned to your mail server. By default, the connection to the mail server is on port 80. If your mail server requires a different port, then append the port number to the IP or DNS address with a colon (i.e. mail.server.edu:26).

MsgsAll
The MsgsAll setting is an onscreen message that appears on the Default Login Screen. This message appears to all users before they log in to the Trac application. It is commonly used to provide instructions or links to assistance with the login process. The message is written in HTML code and can be customized with the HTML tags.

navHeaderCheckDelay
The navHeaderCheckDelay setting is utilized in the AdvisorTrac Profiles. The Trac Navigation provides a message about students waiting to be seen in the Log Listing. In order to provide this message, the Trac
Navigation must check the server on a regular basis to receive the most up-to-date information. Typically this setting is set at 120 seconds, and it is recommended that the setting is not below 90 seconds.
Constantly refreshing the Trac Navigation can provide unnecessary hits to the server and impact performance.

Student Access
The Student Access Preference controls student access to certain functionalities within your Trac system. As the Student group differs significantly from other groups in Group Access, the majority of the access level for the Student group can be handled here within the System Prefs.

Functionalities for the student group include the abilities to:

- Edit Bio from Main Menu
- Book appointments
- View own visits
- View full name of Consultants
- Browse Resources
- Post documents
- Control Access based on Center Status (banned, etc)

CAMPUS INFORMATION

Assessments
The Assessments allow you to work with Redrock Software Corporation to set up custom assessments.

campusColorData
The campusColorData allows you to set up the color scheme for your Trac application. The colors of the title bar, the title text, the window background, and the window drop shadow are all set from this setting.

CampusName

The CampusName appears in the upper-right corner of the Trac system under the school banner. This is a global name for all users across all profiles. Typically the name of your college or university is entered here because it applies to all profiles.

CurrentTerm
The CurrentTerm is required when importing your student registrations. This setting allows your Trac system to identify which registrations are currently active for your students. The CurrentTerm setting must be entered in a numeric format. Each new term must have a higher numeric value than the previous semester. The Trac application can identify the old registrations because their term codes are less than the CurrentTerm. Future registrations have a term code greater than the CurrentTerm. If your college or university only uses an alphanumeric term code, then you can work with Redrock Software Corporation on a translation for your terms.

FacultyAccess
The FacultyAccess settings contain configurations for the Faculty in your Trac application to provide messages and access levels.

FitnessTrac
The FitnessTrac settings contain configurations specific to a FitnessTrac Profile.

FundDefinitions
The FundDefinitions setting is used to set up a Fund Code report. This is commonly used to establish the definitions of a Perkins report.

HTML:NoAccessMsg
The HTML:NoAccessMsg is displayed to users that attempt to log in to your Trac system but are unable to access the system. This might be because they do not have the correct username and password or might be due to incorrect access privileges. The message can be formatted with HTML tags to customize the style, color, or size of your message. You can include links to other pages or an email for assistance.

Login Instructions
The Login Instructions contain settings that control the Log Student window used to sign students in and out of visits. The size of the box, instructions to sign in, and custom sign in procedures can all be setup through the Login Instructions.

LoginLinkData
The LoginLinkData setting controls a Campus and Redrock info boxes on the Default Login Screen. The boxes can be displayed or hidden and the text of the info boxes can be customized.

MainMenuCustomTab-Consultants
The Main Menu for Consultants can contain a custom tab. This setting allows you to enable the tab, name the tab, and provide content for the tab.

MainMenuCustomTab-Faculty
The Main Menu for Faculty can contain a custom tab. This setting allows you to enable the tab, name the tab, and provide content for the tab.

MainMenuCustomTab-Students
The Main Menu for Students can contain a custom tab. This setting allows you to enable the tab, name the tab, and provide content for the tab.

MainMenuCustomTab-Users
The Main Menu for Users can contain a custom tab. This setting allows you to enable the tab, name the tab, and provide content for the tab.

MessageTypes
The MessageTypes setting is used to list the types of messages that can be used to create messages in the student record. The type Student Msg and MESSAGE are default types used by the Trac application and should be included in this list of message types. These message types can then be assigned to groups to specify which types of messages they can create and view in the student message history. (See Chapter 4: Groups > Assigning Subcenter Privileges – Center Access)

ResourceTypes

SCRIPT:FacultyMain
The SCRIPT:FacultyMain setting is used to create customizations on the main menu for faculty. This might be a custom message or script that is executed.

SemesterEnd
The SemesterEnd is the ending date of the current semester. The date is entered in MM/DD/YYYY format. The SemesterEnd date is used to determine the date range for 'This Semester' when performing searches or running reports. Choose, or enter, 'This Semester' to automatically use the SemesterStart and SemesterEnd dates.

SemesterStart
The SemesterStart is the beginning date of the current semester. The date is entered in MM/DD/YYYY format. The SemesterStart date is used to determine the date range for 'This Semester' when performing searches or running reports. Choose, or enter, 'This Semester' to automatically use the SemesterStart and SemesterEnd dates.

StatusCrossTabDefault
The StatusCrossTabDefault setting is used in conjunction with the Appointment Status CrossTab report. The statuses are just the defaults for the report. When running the report, other statuses can be entered for the report. You can use the @ symbol for the wildcard in the statuses, such as @Cancel@ for any appointment status with the word cancel in it.

<div align="center">

STUDENT DATA

</div>

askEthnicity
The askEthnicity setting is no longer utilized in version 4.0.

BARCODERULE
The BARCODERULE is utilized when a script is required to utilize your barcode scanners or magnetic strip card readers. Most barcodes and magnetic strips contain extra data or characters beyond the Student ID. When the card is scanned or swiped, the extra characters must be stripped from the result of the scan. Most card readers will come with software to customize the scanner so it removes the extra characters and only sends the ID portion of the scan. That is the preferred method to work with card eaders, however, not all readers have software to pull just the ID. In that case, you will need to contact Redrock Software Corporation to work on a script to pull the ID out of the full scan. You will need to provide a text file of a sample scan and identify which portion of the scan is the ID.

CustomStudentFields
The CustomStudentFields contains settings to name and provide choices for each of the 9 custom student fields.

CustomStudentTabs

The CustomStudentTabs allows for setup of up to 3 custom tabs that appear on the Student Entry Screen. You may also name up to 3 custom sub-tabs that appear in the General Info tab of the Student Entry Screen. Additionally, you may name up to three sub-tabs that appear on the Student History page. The content is determined by the customized text stored in campus.xml (contact Redrock Software Corporation for customizations) and the security is defined in the group security options.

DEGREEINFO
The DEGHREEINFO setting is customized for specific installations of the Trac application.

formatID
The formatID setting provides a method for setting the number of digits and adding characters to the student ID. If your IDs are a full six digits and there is a student ID of 12345 then enter your preference as
000000. The six zeroes will force all six digits to display, including the preceding zero.

This preference should be used carefully, however, because the formatting might not be entered correctly for your IDs and could then display your IDs as >>>>>>> if the IDs and formatting do not match. For example, if we enter the preference with six zeroes, 000000, but one student has an ID of 1234567, then this student ID could not be formatted according to the rule.

You can prevent this by entering a # symbol for digits that you would like to allow to display but not force.
So, again using our same example, you could enter the preference as #000000. This would force six digits and allow up to seven digits. The ID 12345 would display as 012345, the ID 123456 would display as 123456, and the ID 1234567 would display as 1234567.

SCRIPT:BarCodeSearch
The SCRIPT:BarCodeSearch is a secondary option to the BARCODERULE that is only used if the barcode cannot be handled with the BARCODERULE setting.

StandardStudentFields
The StandardStudentFields setting provides options to set up the choices for the standard student fields.

StoreStudentPass
The StoreStudentPass setting is required to be YES if students will be logging into your Trac application with a password locally stored in the Trac application.

StudEditInfo
The StudEditInfo setting provides a method to allow or prevent student access to edit their bio in the Trac application. If set to YES, then a link is available for the students to click on to edit their bio.

StudentAccess
The StudentAccess settings contain configurations for the Students in your Trac application to provide messages and access levels to various functions including scheduling appointments and viewing their own visit history.

StudentPhotos
The StudentPhotos are set up with three settings: naming, extension, and display. For the Photo naming, there are a couple of basic options. Your photos can be named as the Student ID, Barcode, or internal Sequence number. Any other naming will have to be defined in a custom script that you would need to work out with Redrock Support. For the photo extension, you must include the period in the extension name. .JPG is the default and most common value. For the photo orientation, the options are Tall or Wide in a 3:4 or 4:3 ratio.

When using these settings, the Trac application uses the default location for the photos. The default location is a Photos folder in the application installation directory (i.e. C:*Trac\Photos). Place the student photos in this folder with the correct naming and extension, and they will automatically appear for the students based on your settings.

If you need to input more advanced settings, then you will need to work out the details with Redrock Support.

SCHEDULE PREFS

CreateSubjRecordOnImport
The CreateSubjRecordOnImport setting allows subjects to be created during the import. This setting is defaulted to No. The Trac application currently utilizes the Section records for visits, searches, and appointments; however, there may be a campus customization that would need a subject record. You will not need to utilize this setting unless recommended by Redrock Software Corporation.

ShowAltNameSched
This is now a Profile based setting in 4.0.

SubjectCodeLength
The SubjectCodeLength setting is utilized specifically for subject-based group appointments. This allows you to specify what portion of the SectionTerm code is the subject used for matching the students that join a group session.
For example, you may have a MAT200 course with sections 01, 02, 03, and N1 for the term 201008. These could be identified as:

- MAT200-01 201008
- MAT200-02 201008
- MAT200-03 201008
- MAT200-N1 201008

A group availability for four people could be set up with the # symbol for the subject with a tutor that specializes in the MAT200 sections.

Now, when a student books the first slot in the group appointment for MAT200 01 201008, the entire group is now set for the MAT200-01 201008 section. The SubjectCodeLength setting allows you to determine that the groups will match at a subject level by the value entered in the preference.

If a number is entered, then your Trac application will match the subject at that specific number of characters. So, following the example, if the SubjectCodeLength was entered as 6, then MAT200 would be the matching Subject. This would allow students enrolled in all sections of MAT200 join the same session.

If a character is entered, then your Trac application will match the subject at the location of the specific character. So, following the example, if the SubjectCodeLength was entered with the hyphen (-), then
MAT200 would be the matching Subject. This would allow students enrolled in all sections of MAT200 join the same session. If the SubjectCodeLength is not utilized, then students in a group appointment set up with the # symbol will have to be enrolled in the same specific section.

VISIT PREFS

DefBatchVisitDur
When creating visits through the Batch Entry methods, the default duration of the visit is determined by the setting, DefBatchVisitDur. It can be changed from the time entry fields.

DefQuickVisitDur
When manually creating a visit through the Quick Entry screen, the default duration of the visit is determined by the setting, DefQuickVisitDur. It can be changed from the time entry fields.

DOCUMENT POSTING

DOCPOSTSINSUBDIR

Document Posts are stored on your server in a PostFiles folder in the Trac installation directory. The DOCPOSTSINSUBDIR setting allows your files to be organized into subdirectories within the PostFiles directory. The subdirectories can be named by student sequence number, ID number, Barcode, or Handle.

documentPostTypes
The documentPostTypes setting is used to list the types of Document Posts that can be assigned to an electronic file uploaded to a student record. These Document Post types can then be assigned to groups to specify which types of Document Posts they can create and view in the student Document Post history.

NoStudentUploadApptDoc
A document can be posted to a scheduled appointment. The NoStudentUploadApptDoc setting can enable or disable students from uploading a document to the appointment. This setting requires that students are able to view the appointment document post in order to post a document.

NoStudentViewApptDoc
A document can be posted to a scheduled appointment. The NoStudentViewApptDoc setting can enable or disable students from viewing a document that has been uploaded to the appointment.

SURVEYTRAC SETTINGS

SURVEYHOST (SurveyTrac Module)
When a survey link is emailed to students, the link has to be formatted using three settings: *SURVEYHOST*, *SURVEYPATH*, and *SURVEYPROT*. The *SURVEYHOST* setting allows you to specify the URL of the host system. It may be an IP Address (default) or it may be a registered domain name, such as Trac.college.edu.

SURVEYPATH
When a survey link is emailed to students, the link has to be formatted using three settings: *SURVEYHOST*, *SURVEYPATH*, and *SURVEYPROT*. The *SURVEYPATH* setting allows you to specify the path in the URL that directs the user to the correct SurveyTrac files. The default value for this field is /surveys/ and there should be no need to change it.

SURVEYPROT
When a survey link is emailed to students, the link has to be formatted using three settings: *SURVEYHOST*, *SURVEYPATH*, and *SURVEYPROT*. *The SURVEYPROT* setting is used to specify if the survey link with be a standard HTTP or a secure HTTPS link. The default value for this field is http://. If your Trac application is secured via SSL, then this setting needs to be set to https://.

RESOURCE SETTINGS

ResourceTypes
The ResourceTypes setting is used to list the types of resources that can be assigned to a resource record. These resource types are assigned to resources when they are created to group the resources and run reports. Separate each Resource Type with a Return character. Access to resource types cannot be controlled through the Group Access preferences, but Resource Types can be used to classify different resources. (See Chapter 12: Resources)

WATCH LIST INDICATOR SETUP

Watch List Indicators
See Chapter 14: List Management > WatchLists

Utilities & Prefs – Advanced Prefs

The Advanced Preferences are accessible to the Sys Admin users for setting up more advanced or customized global settings for the entire system. These are system-wide settings that control the Trac system regardless of Center Profile, Subcenter, or Group. The Advanced Preferences are found from the Utilities and Prefs…

There are many more Advanced Preferences that could be customized for your Trac application. This section will highlight only some more commonly used advanced preferences. Many of these preferences do not exist until entered the first time.

campusboxShow
The default login screen can contain a campus information box to the left of the login window. The campusboxShow setting allows you to enter a value of No to hide the campus information box.

campusboxTitle
If the campus information box is showing on the default login screen, you can also set the title of the box.
The default title is simply 'Campus'. Enter another title into the value for this preference to rename the campus information box.

CampusCSS
The colors of the Trac system are highly customizable by default; however, some may wish to be more advanced with their customizations of the look and feel to the Trac application. The default Trac application style sheets may be overridden with custom campus information entered in the CampusCSS preference. Contact Redrock Software Corporation for assistance on entering the correct styles.

LABEL:Password
The password field on the default login screen is simply titled 'Password'. Modify the LABEL:Password setting to change the title of the password field on the default login screen.

LABEL:UserName
The username field on the default login screen is simply titled 'User Name'. Modify the LABEL:UserName setting to change the title of the username field on the default login screen.

popName
When your Trac application sends email through your campus mail server, it is done through a process called mail relay or mail forwarding. This can typically be done anonymously so there is no account needed to send an email. Some universities, however, will not allow anonymous mail relay and require a username and password to authenticate a user to relay the mail. The popName setting contains the username of this account. The popPass setting contains the password of this account.

popPass
When your Trac application sends email through your campus mail server, it is done through a process called mail relay or mail forwarding. This can typically be done anonymously so there is no account needed to send an email. Some universities, however, will not allow anonymous mail relay and require a username and password to authenticate a user to relay the mail. The popName setting contains the username of this account. The popPass setting contains the password of this account.

SCRIPT:AdminMain
The SCRIPT:AdminMain setting allows for customizations to be run on the main menu for users. This setting is customized by Redrock Software Corporation.

SCRIPT:facultyMain
The SCRIPT:facultyMain setting allows for customizations to be run on the main menu for faculty. This setting is customized by Redrock Software Corporation.

SCRIPT:ImportScript
The SCRIPT:ImportScript setting stores the script that loads data from your student information system. The script is written by Redrock Software Corporation to match your student and course files.

SCRIPT:JSFacultyMain
The SCRIPT:JSFacultyMain setting allows for custom JavaScript to be entered on the main menu for faculty. This setting is customized by Redrock Software Corporation.

SCRIPT:JSStudentMain
The SCRIPT:JSStudentMain setting allows for custom JavaScript to be entered on the main menu for students. This setting is customized by Redrock Software Corporation.

SCRIPT:PHOTOLOC
The SCRIPT:PHOTOLOC setting is used when the student photos cannot be set up with the default photo options in the System Preferences. If your photos are accessible through a URL, then this is the option that will have to be utilized. It is customized by Redrock Software Corporation.

SCRIPT:TutorMain
The SCRIPT:TutorMain setting allows for customizations to be run on the main menu for consultants. This setting is customized by Redrock Software Corporation.

SCRIPT:Validate

The SCRIPT:Validate setting stores the script that authenticates users from another authentication system such as LDAP or Active Directory. The script is written by Redrock Software Corporation to match your specific LDAP settings.

welcomeboxShow
The default login screen can contain a welcome box to the right of the login window. The welcomeboxShow setting allows you to enter a value of No to hide the welcome box.

Utilities & Prefs - LDAP Tool

The LDAP Tool is used to find the correct LDAP configuration in order to authenticate users in your Trac system with your university authentication system. Redrock Software Corporation has worked with many different LDAP and Active Directory systems and will help you configure your system. When the correct settings are found, Redrock Software Corporation will need a screen shot of the correct configuration settings to create a custom authentication script for your Trac application. There are three types of binds to an LDAP system: Anonymous, Simple, and Double Bind.

An Anonymous Bind is when the LDAP system allows a user to connect to the LDAP directories without entering a username and password. This is not a secure method of binding to the LDAP directories and cannot be used to authenticate users into your Trac application. No user is authenticated without verifying they have entered valid credentials. That can only be accomplished by a simple or double bind.
A Simple Bind is when the LDAP system allows a user account to connect directly to the LDAP directories by entering a username and password. This is a secure method of binding to the LDAP directories and can be used to authenticate users into your Trac application. When a user enters their username and password on the default login screen, your Trac application takes that information and immediately passes it to the LDAP Server with the settings found in testing. The Search Criteria in the Simple Bind does not have any bearing on the authentication and is typically left as (cn=NOTAUSER) so the LDAP Bind does not produce any results. The results do not matter when authenticating through a simple bind – just that the LDAP Server returns a good status response or an error. If there is an error, then the user is not validated and is not logged into your Trac application. If there is a good status, then the user is found locally in your Trac application by the username that they entered or by a field returned by the LDAP Bind and Search.

A Double Bind is when the LDAP system requires a Bind, Search, and a second Bind to connect to the LDAP directories. This is a secure method of binding to the LDAP directories and can be used to authenticate users into your Trac application. When a user enters their username and password on the default login screen, your Trac application performs a Bind with a specific LDAP account and performs a Search on the username that was entered on the default login page. When the LDAP system returns the directory information for the user, your Trac application finds the Distinguished Name (DN) for the user and then attempts to Bind a second time with the returned DN and the password that was entered on the default login screen. The LDAP Server returns a good status response or an error. If there is an error, then the user is not validated and is not logged into your Trac application. If there is a good status, then the user is found locally in your Trac application by the username that they entered or a field returned by the Search.

LDAP Server Address
The LDAP Server Address field is for the IP Address or DNS for the LDAP Server.

Username & Password
The Username and Password fields are for the user's credentials to authenticate.

Base DN

The Base DN field is for the directory information to access the LDAP Server.

Encrypted Bind & LDAP Port
Choose if the LDAP connection is secure and specify the port. Standard ports are 389 or 636.

Search Criteria
The default Search Criteria is (cn=NOTAUSER). A Simple Bind does not need to search for any specific user so the search for NOTAUSER is just fine.

Return Attributes
The Return Attributes are only necessary in the Double Bind scenario. This allows for returning specific information about the user from the LDAP directories.

Utilities & Prefs - Email Tool

The Email Tool is used to test and verify the settings to connect to the university Mail Server in order set up the Trac system to send emails to the users. The correct settings are confirmed when the emails send through this screen are received. To test on your own, use the form to email yourself. When the correct settings are found, you will want to enter the correct MailServer in the System Preferences. If authentication is required, then enter the username and password in the popName and popPass Advanced Preferences.

Mail Server & Port
The Mail Server is the IP Address or DNS for your Mail Server. The default port for the mail server connection is 25, but your system may utilize a different port. The Mail Server from your successful test needs to be entered in your System Preferences MailServer setting. If the mail forwarding is from a port other than 25, then the Mail Server needs to be entered in the System Preferences with a :25 appended to the server address.

User ID & Password
The Username and Password fields are for the user's credentials to send email. If the username and password are required to send the email, then these values need to be entered in the Advanced Preferences, popName and popPass.

Authentication Method
If authentication is required to send email, then set this to TRUE

From Email Address
The From Email Address field is the email address from which the test email is sent.

To Email Address
The To Email Address field is the email address to which the test email is sent.

Email Subject Line
The Email Subject Line field is the subject of the test email.

Email Message
The Email Message field is the body of the test email.

Display Verbose Logging in Results
The Display Verbose Logging checkbox enables a detailed log of the mail process. This allows you for troubleshooting if sending the email fails.

Utilities & Prefs - Automated Events

The Automated Events tab provides an interface to automate various events on the server. There are some standard events already set up and others can be customized or duplicated. The automated events can run daily, weekly, or monthly. You can even create a second version of an automated event to run it on an additional schedule. For example, if you wanted your import script to run twice a day instead of just once, then you simply create another automated event with the same settings as the initial event and just change the time that it runs each day.

One rule to keep in mind with the Automated Events is that you cannot have two events set to run at the same time. The events should be spaced a minimum of 10 minutes apart to ensure that the previous event has completed before the next event begins. Here are some of the standard Automated Events.

Auto Termination
xml_doProc("nightTerminate")
The Auto Termination event sets the time of day that the system will terminate all of the currently logged in students. This is typically run each day after all of the centers have closed. The Termination settings are set up in the Center Profile Prefs.

dataBackup
xml_doProc("SCRIPT:DataBackup.txt")
The dataBackup event runs on Windows servers and creates a copy of the 4DD data file that stores all of the Trac system activity. This is typically run each day in the early AM hours (1:00am to 4:00am) and set at a time to work in conjunction with network backups.

Faculty Emails
xml_doProc("facultyEmails")
The Faculty Emails event runs on TutorTrac profiles and sends an email to each faculty member of the visits for their student the previous week. This is typically run weekly on Friday, Saturday, or Sunday.

missedAppt
xml_doProc("apptCalcMissed")
The missedAppt event checks each appointment for a matching visit and sets the Missed or Attended statuses for each appointment. This event also sends the Missed Appointment email when the student did not show up for their appointment. This is typically run each day after the Auto Termination script.

MoveLogFile
zMoveLogFile
The MoveLogFile event resets the server logs. This event is typically run on the first of the month in the early AM hours (1:00am to 4:00am) to start the logs fresh each month.

Nightly Restart
xml_doProc("relaunch")
The Nightly Restart event allows the Trac system to shut itself down and restart. This will clear up any cache issues, server messages, or locked records. It is recommended to run the Nightly Restart event each night for the schools with high activity on their system. The systems with an AdvisorTrac Profile are also recommended to run the Nightly Restart script because advisors access more areas of the system than consultants of other profiles. This is typically run each night after the other processes have completed.

Send Email Reminders
xml_doProc("apptReminders")

The Send Email Reminders event sends the appointment reminder emails to the consultants and students for their appointments the following day. This is typically run daily in the afternoon or early evening hours. It should be scheduled early enough that the users will have time to check their emails for the reminders at the end of the day.

Center Profile Entry

Center Profile is a setup of unique subcenters, users, consultants, settings, and preferences. A single Trac application comes with a single profile by default; however, additional profiles may be purchased if you have some centers that operate in a slightly different manner from the original profile. A profile is related to a product type (TutorTrac, AdvisorTrac, LabTrac, or FitnessTrac) and will have some unique features enabled for the profile.

To get to your new Center Profile, roll your mouse over the search glass on the Trac Navigation search window and click Center Profiles. *This will bring you to a Listing Screen.*
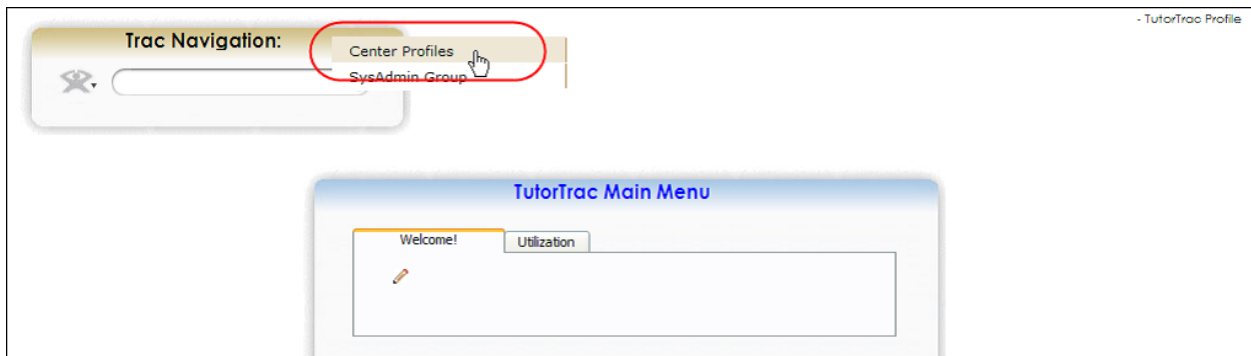
Click your Profile name to edit your Profile.
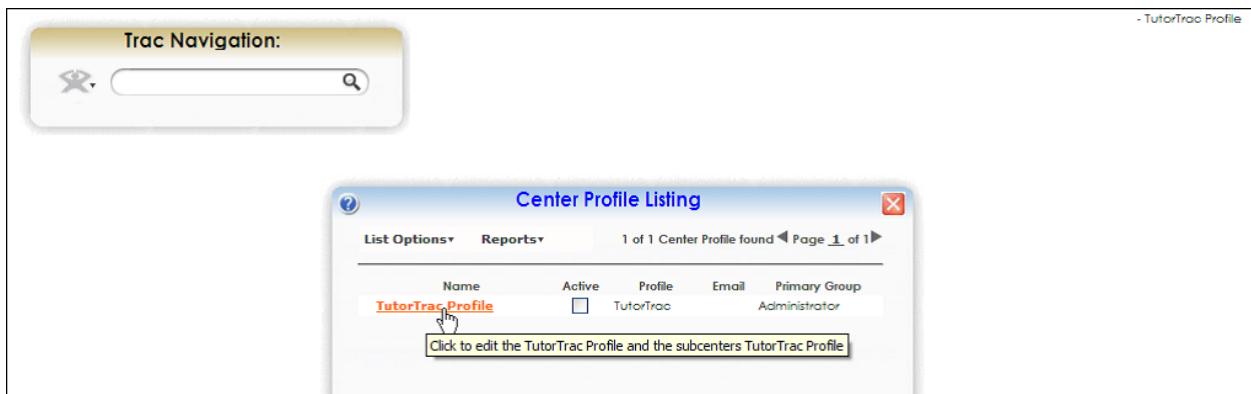
Activating your Center Profile

A Profile is not activated until you receive an Activation Code from Redrock Software. Email support@Go-Redrock.com with the Sequence number found at the top of the Center Profile record. You will receive an email containing your Activation Code for this profile. You will only receive an Activation Code for the number of Center Profiles that you have purchased. Enter the Activation Code, uncheck the Deactivated checkbox, enter the General Info in the Center Profile, and click *Save*.

Creating Subcenters

After you have activated your Center Profile, we now have the ability to create subcenters. A subcenter could represent a physical center, department, unit, or any other division that you might need to separate activities, users, consultants, schedules, and visits. Typical subcenters include Learning Centers, Math Centers, Writing Centers, Advising Centers, but subcenters do not have to be limited to actual physical locations.

To create a subcenter, navigate to the *Centers* tab within your Center Profile. Click *Create New* to begin the process of creating a new subcenter.

Enter the name of your Subcenter in the *Subcenter Name* field.

Click *Save Subcenter* to Save your Subcenter.

Center Profile Prefs

The second area of settings is found in the Center Profile. The Center Profile(s) are only accessible to users in groups with Center Admin level privileges. The Center Profile contains preferences specific to the

Center Profile and its related Groups, Users, and Consultants. Because these settings have Profile-wide implications, the Center Profile Entry is only accessible to Center Admin and Sys Admin Groups. Move your cursor to the Trac Navigation Menu and mouse over the search glass in the search bar. Select Centers to access a listing of all Center Profiles. Click on a Center Profile to access the Center Profile Entry screens.
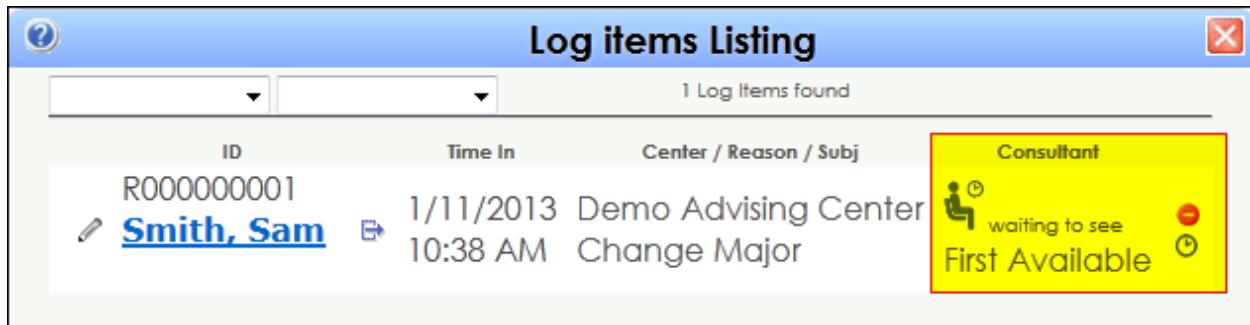
To get to your Center Profile Prefs, roll your mouse over the search glass on the Trac Navigation search window and click Center Profiles. Click on your Center Profile. Select the "Prefs" Tab.

Log in/Out

Use a Waiting Room

Activating this preference allows you to collect Wait Time data. This applies in the situation where a student comes in to your center, logs in, and then waits to be assigned a Consultant. After the student logs in, the system places this student in a "Waiting Room" until either a Front Desk worker or Consultant takes the next step and assigns the student a Consultant for the session.

The Waiting Room preference is typically used by Advising Centers. If a student Logs in and is waiting for the "First Available" Advisor, your Log Listing will indicate this student's status.

At this point, our student is still waiting to be assigned a Consultant. Clicking on the icon of a person sitting looking at the clock will then initiate the beginning of the session, at which point, the "waiting to see" message will change to "being seen by".

Choose Consultant on Login

Activating this preference allows the user who is signing in to select a Consultant during the *Login* process. The "# Choices" field just to the right determines the maximum number of Consultants displayed during Login. Consultants displayed in the drop down box during Login will be organized alphabetically, so if 30 consultants are linked to your Writing Center and you set the max to 10, the first 10 Consultants in alphabetical order will be displayed, if the Writing Center is selected.

Set initial status to 'waiting' on log in

This preference, if activated, will set the Student's initial status to 'Waiting' upon log in. This preference is designed based on the assumption that Wait Time is a data field that is being collected.

And include wait time in total time for visit

Activating this preference will include wait time with Total Visit Time. If Wait Time and Visit Time need to be separated, do not activate this preference.

Allow "First Available" as a choice

This preference, if activated, allows "First Available" as a choice for students when selecting a Consultant. The "First Available" choice allows Consultants to then claim a student for a session, or Front desk workers to then assign a student to a Consultant.

Only 'First Available' for these subcenters (blank for all):

Activating this preference will only allow the "First Available" choice when users are asked to "Choose a Consultant".

Choose Consultant on Logout

Activating this preference allows the user who is signing in to select a Consultant during the *Logout* process. The "# Choices" field in the "Choose Consultant on Login" determines the maximum number of Consultants displayed in this preference as well. The checkbox next to "Required", if activated, will force students to select a Consultant.

Ask for Subject

Activating this preference asks the user who is signing in to select a *Subject* for the session. The "Display # Choices" field just to the right determines the maximum number of Subjects displayed during Login.

Use section schedule on Logging Visits in

Activating this preference will prompt the system to check a Student's Class Schedule when the selected Student is logging in. Activating this preference will only ALLOW students to login during class times. Typically this preference is used for Attendance purposes. Keep in mind that in order for this preference to function properly, student Class Schedule information must be imported or added to your Trac system database (Class start time, end time, Course ID, student name/ID, etc…)

Yes, use time window (___) min before, and (___) min after

The settings entered in this preference determine the tolerance level for both the **"Use section Schedule on Logging Visits In"** preference above, and the **"student may not log in during class time"** preference below. For example, let's say we enter 10 minutes into the "before" field and 10 minutes into "after" field for this preference. If the **"Use section Schedule on Logging Visits In"** preference above is activated, students will be able to log in up to 10 minutes before class and 10 minutes after class. If the **"student may not log in during class time"** preference below is activated, students will NOT be able to log in up to 10 minutes before class and past 10 minutes after class ends. If both preferences are checked, the system will disregard the first preference (**"Use section Schedule on Logging Visits In"),** while still using the time/tolerance parameters defined in this setting.

Display section even if no schedule data exists (otherwise exclude)

This preference, if activated, will display a Section even if said section does not have the corresponding schedule data for a student(s). So if not all courses have associated schedule data, they may still be displayed so students may log in.

Ask for Reason

Activating this preference asks the user who is signing in to select a *Reason* for the visit. The "# Choices" field just to the right determines the number of Reasons displayed, and consequently, the size of the field that Reasons are listed in. Enter "1" in the "# choices" field to create a Pull Down menu for Reasons.

Conclude related visits when a Consultant concludes a work visit.

A related visit occurs when a Consultant signs in for a Work visit (clocks in), and a student then signs in for a session with said Consultant. This student visit is then defined as a "related visit" for the Consultant. The activation of this preference determines whether these "related visits" will also be concluded when a Consultant signs out of their work visit, or logs off using the "work" reason. Activating this preference will proceed to conclude all related visits (to a Consultant), when said Consultant clocks out.

Student may not login during the student's class time

Activating this preference will prompt the system to check a Student's Class Schedule when the selected Student is logging in. If said Student is supposed to be attending a scheduled class at the time of login, the system will deny Access (for the reason of having to attend class). The Time window/tolerance that the system will allow can be set through the preference above "Use Time Window (___) min before, and (___) min after" (for the **"use Section schedule on logging visits in"** preference). Keep in mind that in order for this preference to function properly, student Class Schedule information must be imported or added to your Trac system database (Class start time, end time, Course ID, student name/ID, etc…)

Delay for welcome / goodbye messages: (___) / (___) seconds

During the login/logout process, 2 brief messages are displayed: a welcome message and goodbye message. This preference determines the length of time which these two messages are displayed. When set to zero or left blank, the welcome and goodbye message will remain on a user's screen until they click "Continue". Any value entered greater than 0 will prompt the system to automatically close these messages, after the number of seconds that you specify here.

Delay for log listing refresh: (____) seconds (minimum 60 seconds)

This preference determines the rate at which the Log Listing page automatically refreshes. In the situation, let's say, where a computer at the Front Desk constantly displays the Log Listing, this preference is designed to keep the list of students currently logged in to your Subcenters as accurate and updated as possible by reloading itself every (____) seconds.

Auto Terminate Visits Longer Than:

The Auto Terminate Preference is designed to handle a few issues regarding the recording of Visit data. First, what happens if a student logs in at 8am to your Subcenter, leaves for class, comes back and logs out at 5pm. Second, what happens if a student forgets to log out after a session? You as an Administrator sign in to the Trac system one day, view the Log Listing, and see a student who has made an 18 hour visit. When looking at the Visit Summary for the previous day, you notice that another student also made a 9 hour Visit (from 8 am to 5 pm). Considering the validity of the Reports you need to run at the end of the month, you turn to the Auto Terminate Preference for redemption.

The Auto Terminate Preference works hand in hand with the Auto Termination Automated Event. The Automated Event runs off of the settings that you define in these Auto Terminate Preferences.

The Auto Termination Automated Event takes every Visit that is Longer than (___) minutes, and changes the Visit time to (___) minutes. The first preference determines which Visit records will be modified based on the Time settings that are put into place.

To activate this preference, enter a number of minutes in the first field. This number will set the Maximum Time for a Visit Duration. Enter a number of minutes in the second field to assign a default Time value to all of the visits that have a duration greater than the Maximum Time for Visit Duration that was set in the first field.

Auto Terminate Visits Longer than (_____) minutes, and change visit to (____) minutes.

Let's say we set the first field to 180 minutes, and the second field to 60 minutes. This signifies that ANY visit longer than 3 hours will be automatically changed to a duration of 1 hour. This change will take place whenever the Automated Event (Auto Termination) takes place (typically nightly). If the second field is blank or set to zero, Visit Records that exceed 180 minutes will be deleted.

Auto Terminate on Log List: and set the visit time to (____) minutes

The Auto Terminate on Log List preference handles the situation in which students forget to log out of your center(s). While the Auto Terminate preference above modifies visit time based on length of visits, the second Auto Terminate preference will remove any students who remain on your Log Listing, and then change their visit time to a value that you determine. These two preferences deal with two different types of Visits. The first preference handles Visits that have been completed, as illustrated in

the first example above (student visits from 8am to 5 pm). But in the situation where a student forgets to log out, the Visit has not yet been concluded. The difference between the two students lies in the fact that the second student did NOT sign out. This preference will modify Visits that have not yet been concluded (Student is still on the Log Listing). Basically, when the Automated Event runs, any student who is currently still on your Log Listing will be removed from the Log Listing, and the respective visit duration will be changed to the time you set in the second setting (set the visit time to).

- **Log out of this center when student logs in to another center**

    This preference, if activated, will limit a student to only be able to be logged in to one center at a time.

Warn user if visit time less than (_____) minutes

This preference, if activated, will display a warning message to Students who log off after a certain length of time (brief). The default value is set to 15 minutes, and so if this preference is activated, students who are attempting to log off before the 15 minute mark, will receive a warning, which you may customize through the next preference.

Warning message to display (…)

The (…) icon, when clicked, will expand to a larger text field, where users can enter the custom Visit Warning message to send to users who may be logging out too early. The message could be something along the lines of, "You haven't completed a 15 minute visit yet. Are you sure you want to log off?"

Display subject in Log List

Activating this preference will display Subjects for visits shown in the Log Listing. This privilege can be further restricted in the Group Access preferences.

Display reason in Log List

Activating this preference will display Reasons for visits shown in the Log Listing. This privilege can be further restricted in the Group Access preferences.

Display Student ID in Log List

Activating this preference will display Student IDs for visits shown in the Log Listing. This privilege can be further restricted in the Group Access preferences.

Obscure Student ID (****) on Log In

Activating this preference will obscure Student IDs entered in the Log Student Window. This privilege can be further restricted in the Group Access preferences.

Allow creation when ID not found**

Activating this preference will allow a User to create a new Student Profile if an ID or Full Name entered in the Log Student Window is not found.

Consultant Choice on Login

Allows for customizations of Consultant choices. Contact Redrock Support for details (support@go-redrock.com)

Center Choice Modifier

Allows for customizations of Center choices. Contact Redrock Support for details (support@go-redrock.com)

Subject Choice Modifier

Allows for customizations of Subject choices. Contact Redrock Support for details (support@go-redrock.com)

Reason Choice on Login

Allows for customizations of Reason choices. Contact Redrock Support for details (support@go-redrock.com)

Logged in via: (Staff) or (Student)

Defining this preference is essential for perfecting your Login/Logout process. Your Trac system must have this distinction made in order for your system to successfully design the Login procedure for a specific User. For instance, the following preference "**Show student messages on Login**" may not be logical if a Staff member is logging in your students.

Show student messages on Login

Activating this preference will display the Student's recent message history during the Login process.

Login Terms and Conditions

You have the option of adding a Terms and Conditions that students must agree to before logging in to your Center.

Label for Acceptance of Terms: Default (I Accept)

This preference determines the Label for your Acceptance of Terms (See following Screenshot for Terms & Conditions)

Terms & Conditions: Acceptance of Terms

Logged out via: (Staff) or (Student)

Defining this preference is essential for perfecting your Login/Logout process. Your Trac system must have this distinction made in order for your system to successfully design the Logout procedure for a specific User. For instance, the following preference "**Show student messages on Logout**" may not be logical if a Staff member is logging your students in/out.

This distinction is typically more relevant in regards to Logging out, as it is during this part of the process that Visit Notes are entered. The User who is entering these notes into your Visit Records then becomes significant. If your Staff members are Logging students out, then the Notes section during Logout will be classified as Visit Notes. If students are logging themselves out, then the Notes section will be classified in the system as Student Remarks. This distinction must be made clear early in the process, so as to avoid confusion in running Reports and collecting accurate Visit Data.

Show student messages on Logout

Activating this preference will display the Student's recent message history during the Logout process.

Enter notes on logout, width (30) height (4) – (default values)

Activating this preference will allow Users to enter Notes during Logout. The Width and Height Fields determine the size of the Text field box that these notes can be entered into.

Enter notes on logout for work visits.

Activating this preference will allow Consultants to enter notes during Logout for *Work Visits*. Record notes per Work Shift may be beneficial for Payroll purposes or for historical reasons.

Auto lock visits older than: (____) days

Entering a number into the days field will activate this preference and prompt your Trac System to Lock Visit Records older than the number you set. Locking a Visit Record will prevent users from modifying or deleting any data. Groups may be given access to edit Locked Visits.

Time Zone Difference:

- **Time Zone Difference From Server: (____) hours**

For example, if your Server is in EST and your Center in CST, the Time Zone Difference *FROM* Server would be = (-1).

Visit Custom Fields

Visit Custom Fields allow you to create Customized Questions to gather additional feedback from students during the Log in / Log out process. There is a limit of 8 Visit Custom Fields per Center Profile.

Scheduling

Schedule no sooner than (7 days) and no later than (24 hours) prior to the Appointment.

This preference defines the Time range in which Appointments are able to be *booked*. The default settings are: Schedule no sooner than (7) days in advance, and no later than (24) hours prior to the appointment.

No cancellations within (24 hours) prior to the Appointment.

This preference defines the Time range in which Appointments are able to be *Cancelled,* previous to the Appointment actually occurring. If this preference was set to, for example, 24:00 hours, students would NOT be able to Cancel an appointment within 24 hours prior to the appointment.

Appointment Duration Minimum:

This preference defines the *minimum* length for ALL appointments, and basically restricts the *minimum* duration of Appointments that you will allow to occur in your Centers.

Appointment Duration Maximum:

This preference defines the *maximum* length for ALL appointments, and basically sets a limit for the *maximum* duration of Appointments that you will allow to occur in your Centers.

Default Appointment Duration:

This preference determines the default duration for ALL appointments.

Appt Start in Increments of (00::00)

This preference defines the Increments of time with which you use to measure Appointment duration. If your Centers use schedules based on 10 minute Intervals (1:50, 2:40, etc), for example, we would enter "00:10" to set up the Appointment Start times appropriately. You can use (00:00) to ignore this setting.

Appt End in Increments of (00:00)

This preference defines the Increments of time with which you use to measure Appointment duration. If your Centers use schedules based on 10 minute Intervals (1:50, 2:40, etc), for example, we would enter "00:10" to set up the Appointment Start times appropriately. You can use (00:00) to ignore this setting.

Appt Duration in Increments of (00:00)

This preference defines the Increments of time with which you use to measure Appointment duration. If your Centers use schedules based on 10 minute Intervals (1:50, 2:40, etc), for example, we would enter "00:10" to set up the Appointment Start times appropriately. You can use (00:00) to ignore this setting.

Default Multi-Slot Times: _____ minutes

Multi-Slot Times allow users to book *multiple* appointment slots. For example, if a Consultant was available for 1 hour appointments Monday Afternoon from 1 to 4 pm, a student could be given the option to book all three appointments: the 1:00 appointment, the 2:00 appointment as well as the 3:00 appointment. This preference determines the Default Slot times (for this example 1 hour) of these additional appointments, if the student wants to book multiple appointments.

SPECIAL FIELDS (ON SCHEDULE AND ENTERING APPOINTMENTS)

Reasons: (_) Use Reason Specialties on Search Avail:

Activating this preference will display the Reason field in the Search Availability Window. When searching for an Availability, the user who is performing the search has the option of entering a Reason to limit the search. If the activation of this preference is desirable, make sure that during the process of setting up Availabilities, Reason is defined (*See Chapter 6: Reasons - Reason Specialties section*).

Show on Schedule:

Activating this preference will display Reason Specialties on the Schedule: specifically next to the Time field on the Availability itself.

Enter in Avail

Activating this preference will allow Reason to be entered while creating Availabilities. Reason will be displayed in the Availability Entry Window.

Enter in Appt

Activating this preference will display the Reason Specialties on the Appointment Entry Window.

(_) Required

Activating this preference will force users to specify Reason Specialties during their search. A search will not be able to be performed without entering a Reason Specialty.

Locations: (_)

Activating this preference will display the Location field in the Search Availability Window. When searching for an Availability, the user who is performing the search has the option of entering a Location to limit the search. If the activation of this preference is desirable, make sure that during the process of setting up Availabilities, Location is defined (*See Chapter 9: Availabilities: Availability Entry Options section*).

Show on Schedule

Activating this preference will display Location on the Schedule. When you hover your mouse cursor over an Availability, Location will display.

(_) Enter in Avail

Activating this preference will display Location in the Availability Entry Window (when setting up Availabilities).

(_) as Text

Activating this preference allows users to, instead of selecting from a Pre-defined list of Locations, enter in Custom Locations as Text. Rather than clicking the Dropdown menu next to Locations and making a selection, users can simply click in the field and Type a Location name (i.e. Room 101).

(_) Enter in Appt

Activating this preference will display the Location Specialties on the Appointment Entry Window (when booking Appointments).

(_) Required

Activating this preference will force users to specify Location during their search. A search will not be able to be performed without entering a Location.

Sections: (_)

Activating this preference will display the Section field in the Search Availability Window. When searching for an Availability, the user who is performing the search has the option of entering a Section to limit the search. If the activation of this preference is desirable, make sure that during the process of setting up Availabilities, Section is defined (*See Chapter 5: Sections - Section Specialties*).

(_) Show on Schedule

Activating this preference will display Subject/Section on the Schedule: specifically next to the Time field on the Availability itself.

(_) Enter in Avail

Activating this preference will display Subject/Section in the Availability Entry Window (when setting up Availabilities).

(_) Enter in Appt

Activating this preference will display the Subject dropdown menu on the Appointment Entry Window (when booking Appointments)

(_) Required

Activating this preference will force users to specify a Section during their search. A search will not be able to be performed without entering a Section.

OTHER SCHEDULE OPTIONS:

Allow Student to Cancel Appts

This preference, when activated, allows students to Cancel Appointments. When logged in as a Student, any upcoming Appointments will appear in the Welcome Window in the Center of your Main Menu. These appointments can be cancelled simply by clicking on the "X" to the right of the Appointment.

Display Consultant Email:

This preference, when activated, displays the Consultant's email address for Students' reference. The Consultants' email address will be displayed next to their Name in the Search for Availability Results.

Check Student Conflict on Save Appointment

This preference, when activated, will check for any Scheduling Conflicts when students book an Appointment. If a student has another appointment (in any center) at the same allotted time slot, the system will prevent the student from double-booking.

Display Consultant Alias on Availability Search

This preference, if activated, will display Consultant Alias on the Search for Availability Window. Consultant Alias is typically used if a Consultant does not want to display their Full Name, and instead uses an Alias for identification.

Display Notes on Appointment Entry, Students may (_____)

This preference, if activated, will display any Appointment Notes in the Appointments Entry window. Furthermore, Students may:

Edit

The "Edit" option will allow students to Edit and modify any notes entered.

View

The "View" option will only allow students to View Appointment Notes.

Hide

The "Hide" option will hide any Appointment Notes from the student.

Display Consultant Phone on Appointment Entry

This preference, if activated, displays the Consultant's phone number in the Appointment Entry Window. The Consultants' phone number will also be displayed next to their Name in the Search for Availability Results.

Allow User to Enter Visit Notes on Group Roster

Activating this preference allows Users to enter Visit Notes on Group Rosters for Group Appointments. Attendance can be taken for Multi-person / Group Appointments directly from the Schedule, and as students are marked as Attended or Cancelled, Visit records are created or not created appropriately. If Students are marked as Attended and a Visit Record is created, this preference allows for Users to enter Visit Notes for the Visit Record.

Allow User to Enter Send Emails on Group Roster

Activating this preference allows Users to be able to send emails on Group Rosters for Group Appointments. Attendance can be taken for Multi-person / Group Appointments directly from the Schedule, and as students are marked as Attended or Cancelled, Visit records are created or not created appropriately. If Students are marked as Attended and a Visit Record is created, this preference allows for Users to Send Emails directly from the Schedule through the Group Roster.

Block Students from Booking Recurring Appointments

This preference, if activated, will block students from booking Recurring Appointments (Daily, Weekly, Monthly). This is not to be confused with the Multi-Slot function, which will still be available for users to book multiple time slots within the same Availability.

- **Appointment Custom Field:**
- **Display Custom Field on Appointment Entry**
- **Appt Custom Field Label**

This preference allows you to place a Custom Field in the Appointments Entry window. This custom field will appear when the Appointment is being booked, along with the Subject, Reason, Location, Fund, and Status fields (if you so choose). The default Custom Field is set to (Phone) and allows Users to enter their Phone number into the Appointment Record as the appointment is being booked.

Custom Field Required

This preference forces the Custom Field of your choice to be REQUIRED in order to "Save" or book the Appointment.

Appointment Instructions

You can enter in this field any appropriate Instructions for users who are booking appointments. These customized instructions will appear on the Appointments Entry Window, just above the Center Selection Field.

Center Profile: Redrock Tutoring

General | Centers | Group Access | Tutors | Sections | Reasons | Prefs

Log In/Out | Scheduling | Custom Fields | Custom Lists | Emails | Notices

Appointment Custom Field:

☑ Display Custom Field on appointment entry

Appt Custom Field Label: Phone

☐ Custom Field required

Appointment Instructions:

Here are the instructions to book an Appointment:

Custom Choices:

☐ Display Fund on Appointment Entry ☐ Required

Appointment Status & Management:

Appointments Entry

👤 Student: **Sam Smith**
R000000001
555-555-5555

👤 Staff: Jane Doe
555-555-5555

Appointment Info

Here are the instructions to book an Appointment:

Center: Demo Learning Center ▾

Location: Library ▾

Subject: [   ] ▾

Reason: [   ] ▾

Status: [   ] ▾

Date: 1/21/2013

Time: 8:00 AM   To: 9:00 AM

Appointment Duration: 60 ▾ minutes

Phone: [   ] ▾

Notes: [   ]

Created 00/00/00 at 00:00:00 by
Modified 00/00/00 at 00:00:00 by

Save   ☐ Automatically create the visit when this appointment is saved.
☐ Override and send confirmation when this appointment is saved.

Custom Choices

You can define in this field the Choices available for the first preference in this Section: **Appt Custom Field Label**. Any choices that you enter in this field must be separated by a Return (Enter) character, and will appear in the Appointment Entry Window when a user is booking an Appointment.

Display Fund on Appointment Entry

This preference will Display the Fund field that appears in the Appointment Entry Window.

Required

This preference will force the Fund field to be completed in order to "Save" or book the Appointment.

APPOINTMENT STATUS & MANAGEMENT:

Appointment Status Choices (_____)

The Appointment Status Choices Field is an area where we can define our Appointment Status Choices. Here we can designate an unlimited amount of Status types, to accurately classify and process the data of Appointments that occurred. Typical Appointment Statuses include: Attended, Missed, Tutor-Cancelled, Student-Cancelled, or even Student-Missed, Tutor-Missed, Admin Cancelled, Student Cancelled, etc…Make sure to separate each classification with a Return or Enter character.

Status for Attended (_____)

The Status for Attended field allows a user to rename one of the two most important statuses that need to be defined in the system: Attended and Missed. The desired name should be entered in the text field, and also should be included in the preference #1 above: Appointment Status Choices.

Status for Missed (_____)

59

The Status for Missed field allows a user to rename the second most important status: Missed. The desired name should be entered in the text field, and also should be included in the preference #1 above: Appointment Status Choices.

Missed Appointments, Change Status to (_____) automatically each night

This preference involves the Automated Event "Missed Appts" mentioned in the Intro / Definitions section. To briefly summarize, the "Missed Appts" automated event basically checks all Visits that have occurred within a time period, and attempts to link these Visits to the correct Appointments. If an appointment, let's say was set to occur at 12:00 pm on Monday, and the student who booked the appointment logs in at 11:45 am, and signs out at 01:15 pm. Later that night, the "Missed Appts" automated event runs and sees that our student made a visit for an hour and a half. The system also recognizes that the time frame matches that of the Appointment (to a degree of tolerance that you set, i.e. +/- 15 minutes), and therefore successfully matches the Visit to the Appointment, and marks the Appointment status as Attended.

On the other hand, let's say our student does not show up for the Appointment. In this case, the system recognizes that there was no Visit made on Monday by said student. Consequently, the system does NOT link the Visit to the Appointment, as no visit occurred. This preference then comes into play, as the system will then modify the Appointment Status to whatever Status you define here, for example, "NO Call NO Show", if the status of "missed" is insufficient or you want to further define/classify the status of an Appointment.

- **Student Max Missed (_____) appts, since (_____)**
- **Change Center Student Status to (_____)**

The Student Max Missed Preference determines exactly how many Appointments a student can miss, and if so, what happens to the student's Status as a result? For instance, let's say we set a limit at 3 max Appointments missed within a Semester's date range. Let's also say if such a situation were to happen, we would then change the students' status to BANNED. In this case, if a student were to miss 3 appointments within a semester and subsequently attempted to book another Appointment, the system would return with a message indicating the students current status of BANNED, and the reason (missing 3 appointments).

Appointment Fund Choices (_____)

The Appointment Fund Choices Field is an area where we can define the different classifications of Funds. Here we can designate an unlimited amount of Fund types. Make sure to separate each classification with a Return or Enter character.

Appointment Location Choices (_____)

The Appointment Location Choices Field is an area where we can define Locations within Appointments. Location is typically used to further designate a location within a Subcenter – for instance, Writing Center: Location – Room 103. Make sure to separate each classification with a Return or Enter character.

OTHER SCHEDULING BLOCKS:

The "Other Scheduling Blocks" section allows a campus to devise Rules regarding Scheduling. The following parameters will PREVENT a student from booking an appointment, if certain rules are broken.

Prevent a student from booking an appointment if any of the following is true:

- **Maximum of (__) Appts with Status = (_____) from (_____) to (_____)**

This preference (similar to Preference #4 under Appointment Status & Management above) allows a campus to create a Scheduling Block based off of any Appointment Status. If, for instance, your campus has created an Appointment Status of "Student Cancelled", and you would like to prevent students who have Cancelled 3 appointments from booking any further appointments, we could set a maximum limit at 3 Appointments with a status of "Student Cancelled" for this semester.

- **Maximum of (__) Appts with Status = (_____) from (_____) to (_____)**

This preference is the exact same as Preference #1 above, and is available to set a rule involving a different Appointment Status.

- **Prevent booking when Student Status is (_____)**

This preference will simply prevent a student from booking if said student's status is _____. To use an example from earlier, if a student status is BANNED from missing 3 appointments, and this preference has been set to BANNED, said student will not be able to book appointments for the remainder of the time period that you defined.

- **Prevent booking for more than (_____) consecutive appointments Same Consultant, (_) for the same student**

This preference, if activated, will prevent a user from booking consecutive appointments with the SAME Consultant, OR for the SAME Student.

SEARCH AVAILABILITIES:

Center Description/Instruction on search

The Center Description/Instruction on search field allows a user to enter Custom Instructions on the

Search for Availability Window. HTML tags are acceptable in this area. Click on the ⟍ icon on the bottom right corner of the text box to expand the field.

Center Profile: Redrock Tutoring

General | Centers | Group Access | Tutors | Sections | Reasons | Prefs

Log In/Out | Scheduling | Custom Fields | Custom Lists | Emails | Notices

Center description/instruction on search:

```
<b>Please choose a center and a
course and then click Search to
find available tutors.</b>
```

Search Criteria:

Student:
1   Sam Smith

Center:
Demo Learning Center ▼

Please choose a center and a course and then click Search to find available tutors.

Consultant:
▼

Section:
▼

From:
01/15/2013

To:
01/29/2013

Time:
8:00a to 9:00p

Days:
MON TUE WED THU FRI SAT SUN
All | None | M-F

Search

Instructions when no Availabilities Found

The Instructions when no Availabilities Found field allows a user to enter Custom Instructions in the Search for Availability Window, when no results have been found. HTML tags are acceptable in this area. Click on the ⌟ icon on the bottom right corner of the text box to expand the field.

	Sorry, there were no availabilities found. Please email support@go-redrock.com if you need assistance scheduling an appointment.
Instructions when no availabilities found:	

Key: `drop in` `1 on 1` `multi-person class or group` move the mouse over an availability to view the location and other instructions.

Available Time Slots:

Testing the HTML on the AvailResults.
Testing the script on availresults.

Your account has overrides, allowing you to override any scheduling restrictions.

No results found.
Sorry, there were no availabilities found. Please email **support@go-redrock.com** if you need assistance scheduling an appointment.

Show Consultant Choice on Search, if not, use (_____)

Activating this preference will allow Users to Choose a Consultant when Searching for an Availability. The text field to the right of the word "use" has the ability to define a couple of options. If left blank, ALL consultants will be available in selection. A specific Consultant name can be typed here to display a SINGLE Consultant. Entering in the phrase "CHOICE REQUIRED" will force Users to select a Consultant before a search can be performed.

Consultant Choices Script (_____)

Allows for customizations of Consultant choices. Contact Redrock Support for details (support@go-redrock.com)

Show Reason on Search, if not, use (_____)

Activating this preference will allow Users to Choose a Reason when Searching for an Availability. The text field to the right of the word "use" has the ability to define a couple of options. If left blank, ALL Reasons will be available in selection. A specific Reason can be typed here to display a SINGLE Reason. Entering in the phrase "CHOICE REQUIRED" will force Users to select a Reason before a search can be performed. If the Reason choice is required, make sure to define Reasons when creating Availabilities and Appointments.

Reason Choices Script (_____)

Allows for customizations of Reason choices. Contact Redrock Support for details (support@go-redrock.com)

Show Section on Search, if not, use (_____)

Activating this preference will allow Users to Choose a Subject/Section when Searching for an Availability. The text field to the right of the word "use" has the ability to define a couple of options.

If left blank, ALL Subjects will be available in selection. A specific Subject can be typed here to display a SINGLE Subject/Section. Entering in the phrase "CHOICE REQUIRED" will force Users to choose a Subject before the search can be performed. If the Subject choice is required, make sure to define Subjects when creating Availabilities and Appointments.

Show Location on Search, if not, use (_____)

Activating this preference will allow Users to Choose a Location when Searching for an Availability. The text field to the right of the word "use" has the ability to define a couple of options. If left blank, ALL Locations will be available in selection. A specific Location can be typed here to display a SINGLE Location. Entering in the phrase "CHOICE REQUIRED" will force Users to select a Location before a search can be performed. If the Location choice is required, make sure to define Locations when creating Availabilities and Appointments.

Allow Dates on Search, Default from (__) to (__) days

The Allow Dates on Search preference allows a user to enter a Date Range during a Search for Availability. The Default values field will define the values that automatically populate when the Search for Availability page first loads (i.e. 0 to 14 days).

Allow Days on Search, default: (MONTUEWEDTHUFRI)

The Allow Days on Search preference allows a user to specify Days of the Week during a Search for Availability. The Default values field will define the values that automatically populate when the Search for Availability page first loads.

Allow Times on Search, Default from (_____) to (_____)

The Allow Times on Search field allows a user to define a Time Range during a Search for Availability. The Default values field will define the values that automatically populate when the Search for Availability page loads (i.e. 08:00 to 21:00).

When searching, all users will find:

- **Drop-ins (_)   Multi's (class/group) (_)   1 on 1's (_)**

This preference can limit Users Search for Availability to only the Availability Types that you define. Keep in mind though, that this applies to Center Profiles (global to all Subcenters) and not individual Subcenters. So for instance, if all of your Subcenters under 1 Center Profile did NOT do drop-in availabilities (only appointments), we can uncheck the Drop-ins checkbox for this preference, and these types of availabilities will not appear in the Results of the Search for Availability.

When searching, all students will find:

- **Drop-ins (_)   Multi's (class/group) (_)   1 on 1's (_)**

This preference can limit STUDENTS' Search for Availability to only the Availability Types that you define. Keep in mind though, that this applies to Center Profiles (global to all Subcenters) and not individual Subcenters. So for instance, if all of your Subcenters under 1 Center Profile did NOT do drop-in availabilities (only appointments), we can uncheck the Drop-ins checkbox for this preference, and these types of availabilities will not appear in the Results of the Search for Availability for the STUDENTS group.

Show Consultant Location on Availability Results

This preference if activated will display Consultant Location on Availability Results.

Show Consultant Classification on Availability Results

This preference if activated will display Consultant Classification on Availability Results. Consultant Classification is typically used to classify or differentiate Groups of Consultants, for instance, Professional Tutors, Student Tutors, or Assigned Advisors etc..

Custom Fields (Visit)

Custom Fields can be used to receive input from your students. You can have up to 8 custom fields per Center Profile. These custom fields/questions can be integrated into your Login process or in your Visit Records to gather feedback from your Students.

Creating a Visit Custom Field

To create a custom field, click on a **Custom Field Visit #** or click **Create new** create new and fill out the fields on the following screen.

The *Active* field determines whether this Custom Field is actively being utilized by the system. If this Custom field is set to Inactive, the information saved here will be available to view and edit, but will not be functional.

Enter the Name of your Custom field in the *Name / Prompt* field.

The *Appears* field determines where this custom field appears:

- At Login
- At Logout
- Student Entry Only

If *At Login* is selected the Custom question will appear during the Login process.

If *At Logout* is selected the Custom question will appear during the Logout process.

If *Student Entry Only* is selected, the Custom field will appear in the Student Entry form or Student Record, in the Center Info Tab.

Activating the *Required* preference will force users to fill in and answer your Custom question before continuing their login or logout process.

The *Display on Loglist* preference, if activated, will display your custom field on the Log Listing.
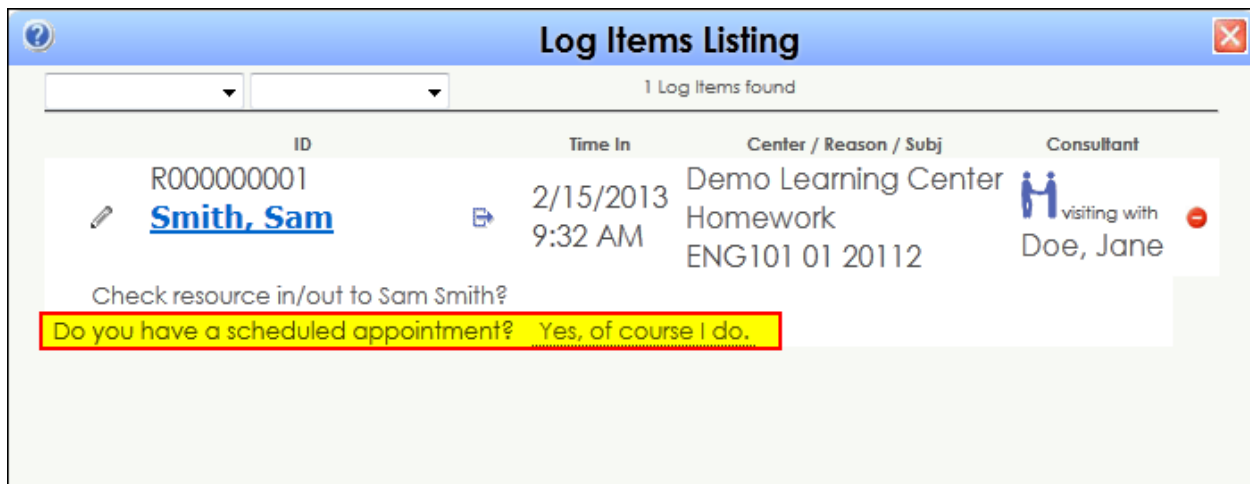
The *Type* field controls the type of field that populates for your Custom field question. Selecting *Alpha* will load a dropdown box. If *Alpha* is selected, make sure to enter the choices that you want to populate in the dropdown box in the *Choices* field below (separated by enter/return character).

If *Text* is selected, a text field will appear next to the Custom field, allowing students/users to type answers into the text field. If *Text* is selected, the *Choices* field below does not apply.

The *sorting code* field allows users to enter a keyword used to categorize this custom field.

The *Access Options* field determines which groups are able to access these custom questions. To add a group, click on the blue dropdown arrow and select the appropriate group(s).

Click *Save* to save your new Visit Custom Field.

Custom Lists

Lists may be used to group any population of students together, and give the user the ability to quickly display all students that belong to a list. Lists can be used in many ways to provide added functionality to your Trac system.

Centers may require that only certain students are allowed to log a visit to a center. This can be done based off of a student list. The same concept applies for appointments as well. Centers may require that only certain students be allowed to book appointments in a particular center. Lists may also be used to group certain student populations. For instance, student athlete lists are commonly used to group student athletes for reporting and messaging purposes. Lists may also be used to categorize students in a particular program, or to track special needs groups.

Lists can be created in the Custom Lists Tab. To create a new list, click on the Create New button and enter a name in the *Name* field. To add students to your list or modify any settings involved with the list, *See Chapter 14: List Management*.

Emails

The Center Profile Prefs: Emails Tab is where the majority of email messages/formats are defined. Each of the following preferences that contain a blue (…) button that when clicked, contains an area where emails can be customized, designed and formatted for different user groups. Use the tables located at the end of this section as reference to format these emails.

Helpful Tip: Each of the fields that contain the actual body of emails being sent out (…) can be expanded by clicking on the triangle in the bottom right corner of the text field.
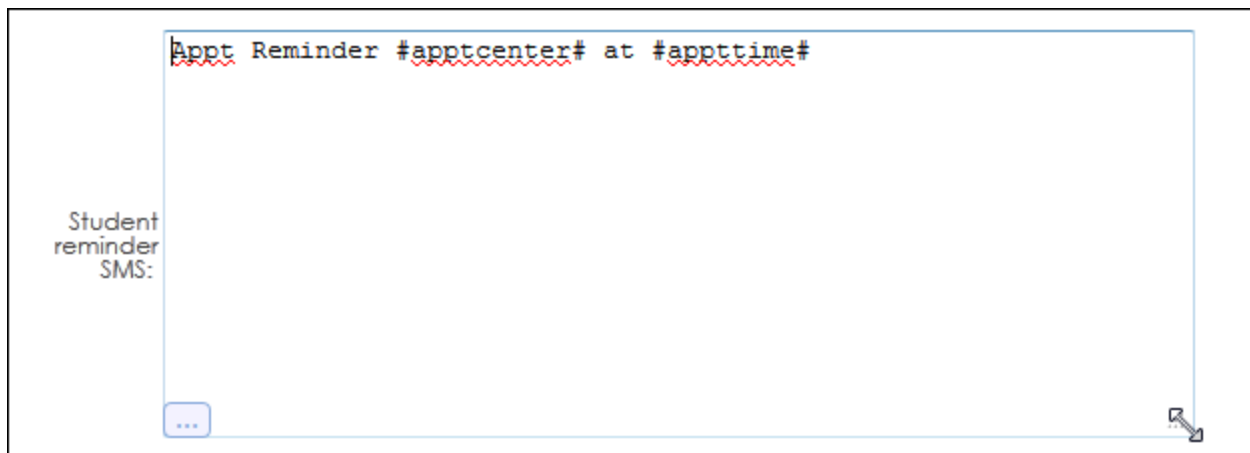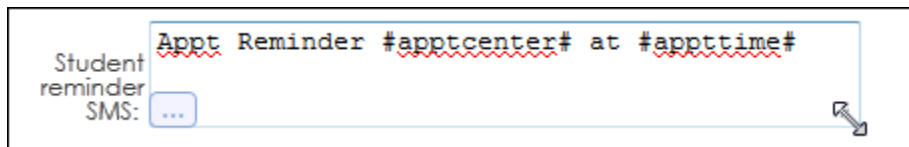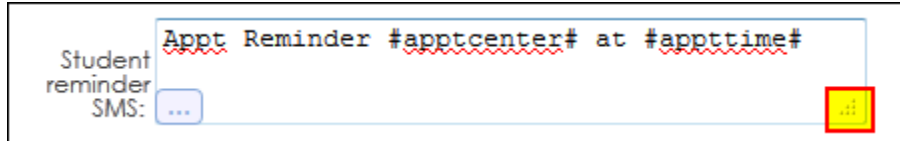
Email schedule summary to Consultant

If activated, Consultants will receive emails containing their schedule summary or a summary of their scheduled Appointments.

Email confirmation to Consultant
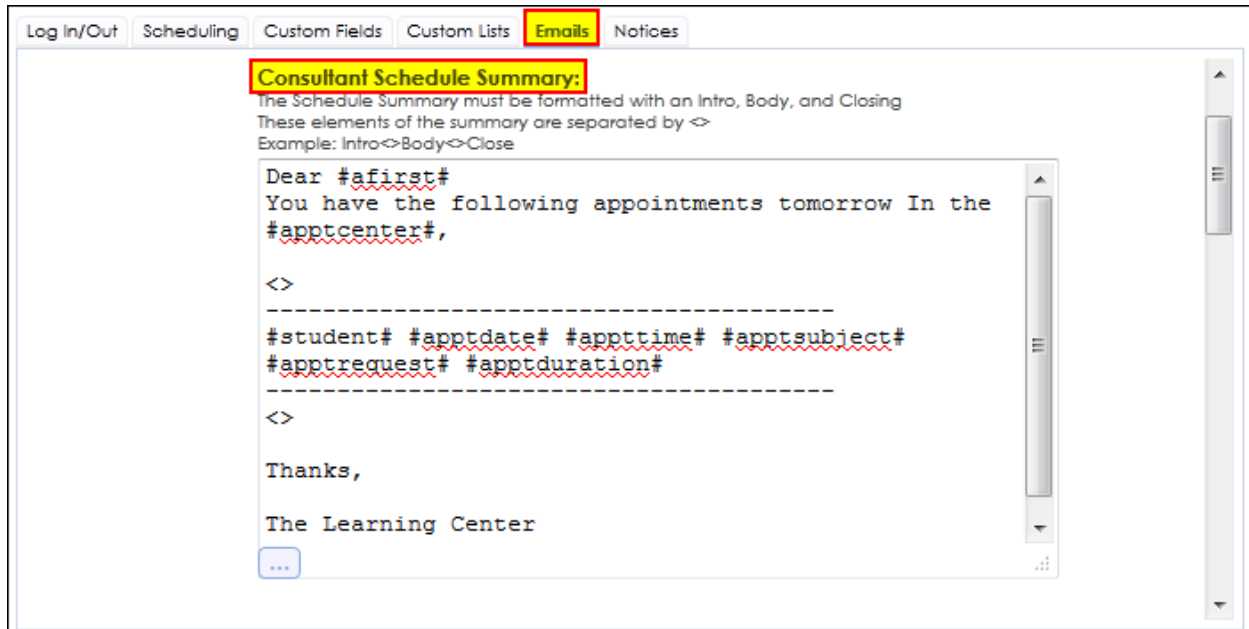
If activated, Consultants will receive individual email confirmations for each of their appointments. The sending of these emails is dependent on the Automated Event "send Email Reminders". These reminder/confirmation emails will be sent whenever this automated event is set to run (typically on a daily/nightly basis after closing hours).

Email cancellation to Consultant

If activated, Consultants will receive emails in regards to appointments that have been cancelled.

Consultant Schedule Summary (…)

The *Consultant Schedule Summary* preference contains an area where the Consultant Schedule Summary email message and format can be modified. Here is a sample Consultant Schedule Summary email taken from our Demo site:

Consultant email subj:

The *Consultant email subj* preference will contain the Subject of your Consultant Schedule Summary email message.

Confirmations and Cancellations are BCC (not CC)

This preference, if activated, will send both Confirmation and Cancellations emails as BCC or blind carbon copies, as opposed to CC, or just carbon copies. Activating this preference will proceed to hide email addresses contained in the Address fields.

Note: Any preference that includes SMS refers to Text Messaging functions. Text alerts are available through the Additional Module: Text Alerts (contact Redrock support for more details – support@go-redrock.com).

Email (and SMS text) reminder to Student, and (_) create message

Activating this preference will allow students to receive Appointment reminder emails for any upcoming appointments the student may have scheduled. The sending of these emails is dependent on the Automated Event "send Email Reminders". These reminder/confirmation emails will be sent whenever this automated event is set to run (typically on a daily/nightly basis after closing hours). The create message field determines whether this message will also be sent within your Trac system.

Email confirmation (and SMS text) to Student, and (_) create message

Activating this preference will allow students to receive Appointment Confirmation emails as appointments are booked. The system will send emails to the email address listed in the student's record or profile. The create message field determines whether this message will also be sent within your Trac system.

Student reminder subj:

The *Student reminder subj* preference will contain the Subject of your Student Reminder email messages. Here is an example from our Redrock Demo site that illustrates the ability to use email codes within the subject line:

Student reminder subj: `#last#, #first# Appointment Reminder #appt`

Student reminder subj: `#first# Appointment Reminder #apptcenter#`

Student reminder email (…)

The *Student Reminder Email* preference contains an area where the Student Reminder email message and format can be modified. Here is a sample Student Reminder email taken from our Demo site that illustrates the use of both the # Email Tables and Html code:

Student reminder email:
```
<i><font size="2" color="red">Please <b>DO NOT</b>respond to this
email</font></i>

Dear #afirst# #alast# and #first# #last#,

The following appointment has been <font color="red">
<b>SCHEDULED</b></font>:

Tutor: #afirst# #alast#
Tutee: #first# #last#
Date: #apptfulldate#
Time: #appttime#
Subject: #subject#
Start Date: #firstApptDate#
End Date: #lastApptDate#

Additional Contact Information:
Tutor Email:<a href="mailto:#tutoremail#">#tutoremail#</a>
Tutee Email:<a href="mailto:#studentemail#">#studentemail#</a>
...
```

```
              Additional Contact Information:
              Tutor Email:<a href="mailto:#tutoremail#">#tutoremail#</a>
              Tutee Email:<a href="mailto:#studentemail#">#studentemail#</a>

    Student   If you have any questions, please contact Redrock Software
   reminder   Corporation at (877)303-7575 x201.
     email:
              Please be on time-

              Thank You,
              Redrock Staff

              Date: #date#
              Time: #time#
              [...]
```
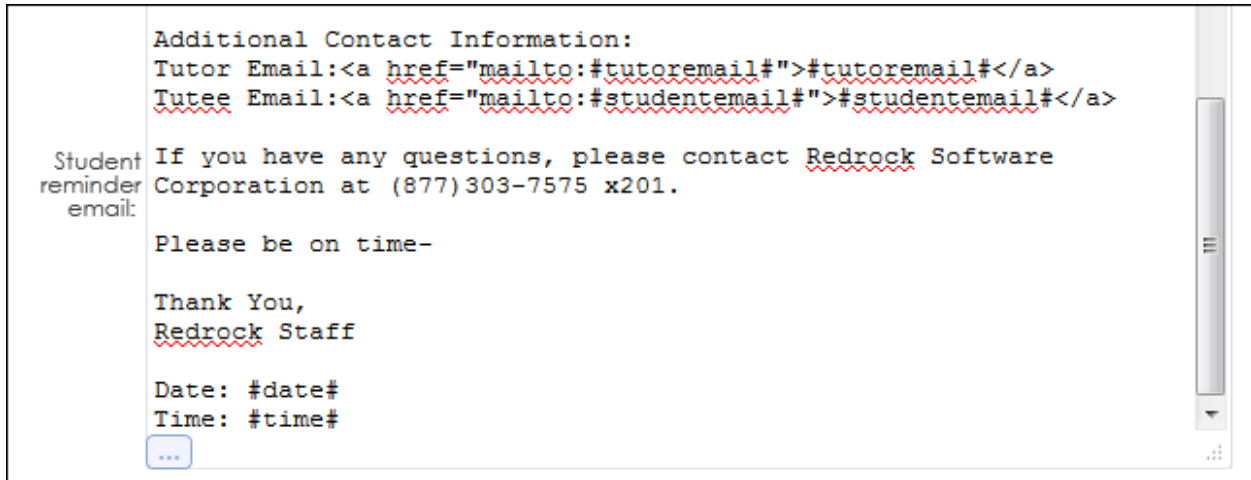
Student reminder SMS (…)

The *Student Reminder SMS* preference contains an area where the Student Reminder TEXT message and format can be modified. Here is a sample Student Reminder Text message taken from our Demo site:

```
              Appt Reminder #apptcenter# at #appttime#
    Student
   reminder
     SMS:     [...]
```
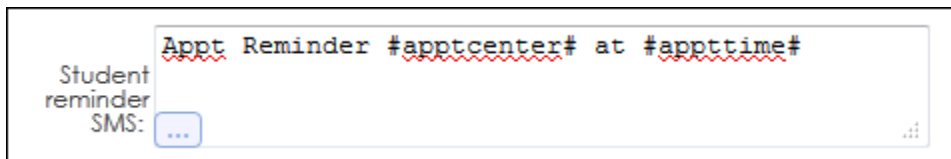
Consultant Reminder SMS (…)

The *Consultant Reminder SMS* preference contains an area where the Consultant Reminder TEXT message and format can be modified. Here is a sample Consultant Reminder Text message taken from our Demo site:

```
              Appt Reminder #apptcenter# at #appttime#
  Consultant  with #student#
   reminder
     SMS:     [...]
```
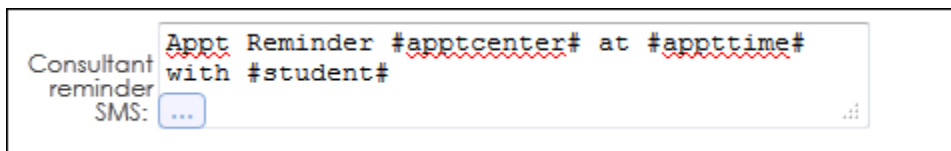
Student confirmation SMS (…)

The *Student Confirmation SMS* preference contains an area where the Student Confirmation TEXT message and format can be modified. Here is a sample Consultant Reminder Text message taken from our Demo site:

Consultant confirmation SMS (…)

The *Consultant Confirmation SMS* preference contains an area where the Consultant Confirmation TEXT message and format can be modified. Here is a sample Consultant Confirmation Text message taken from our Demo site:

Email cancellation to student, and (_) create message

Activating this preference will determine whether or not Cancellation emails are being sent to students. The create message field determines whether this message will also be sent within your Trac system.

Student cancellation subj:

The *Student cancellation subj* preference will contain the Subject of your Student cancellation email messages. Here is an example from our Redrock Demo site that illustrates the ability to use email codes within the subject line:

Student cancellation email (…)

The *Student Cancellation* preference contains an area where the Student Cancellation email message and format can be modified. Here is a sample Student cancellation email message taken from our Demo site:

```
#First# #Last#,

Your appointment(s) have been cancelled for the following
date(s): <font color="red"><b>#apptdates#</b></font>

Subject: #apptsubject#
Time: #appttime#
Center: #center#
Location: #location#
Cancellation Notes: #apptnotes#
Thank you,

Tutortrac Support Staff
```

Student Cancellation SMS (…)

The *Student Cancellation SMS* preference contains an area where the Student Cancellation TEXT message and format can be modified. Here is a sample Consultant Reminder Text message taken from our Demo site:

Student Cancellation SMS:
```
Appt CANCELLED #apptcenter# on #apptdates#
at #appttime#
```

Consultant Cancellation SMS (…)

The *Consultant Confirmation SMS* preference contains an area where the Consultant Confirmation TEXT message and format can be modified. Here is a sample Consultant Confirmation Text message taken from our Demo site:

Consultant Cancellation SMS:
```
Appt CANCELLED #apptcenter# on #apptdates#
at #appttime# with #student#
```

Student missed email (…)

The *Student missed Email* preference contains an area where the Student missed email message and format can be modified. Here is a sample Student missed email taken from our Demo site that illustrates the use of both the # Email Tables and Html code:

```
              Dear #first# #last#:

              You have missed the following appointment

              Tutor: #tutor#
              Subject: #subject#
              Date: #apptfulldate#
              Time: #appttime#
     Student  Location: #location#
missed email:
              You have missed #missed# appointment(s).  Per our Program policy,
              you are allowed 3 absences.  Please call us if you cannot attend a
              session.  If you dropped/withdrew from your course, please notify
              us immediately.  We can be reached at (330)672-3190.

              Academic Success Center Staff
              [...]
```
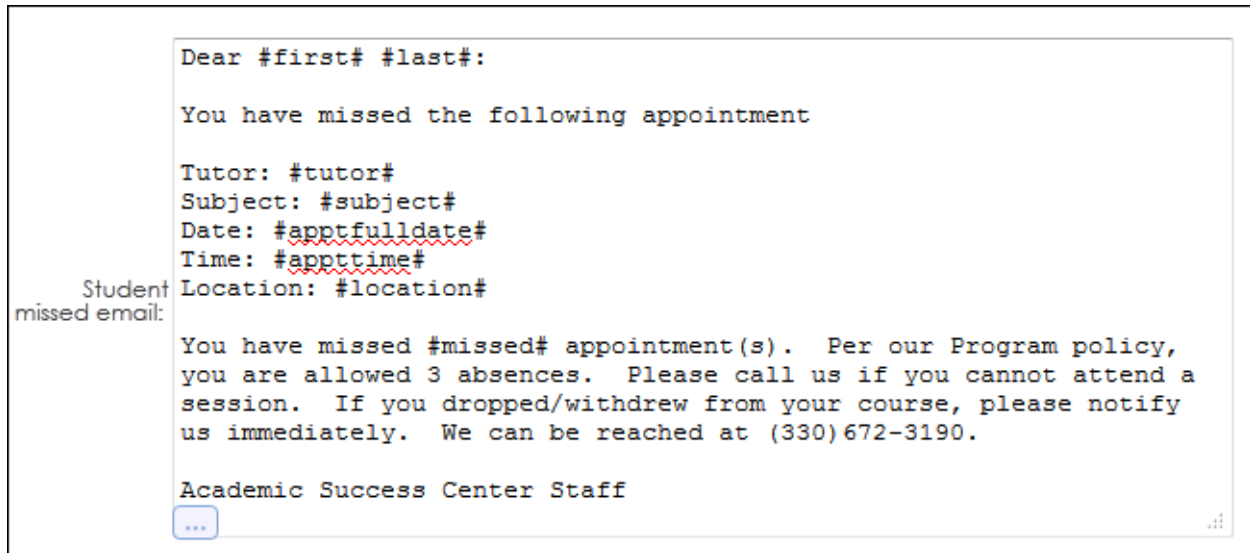
Student Missed SMS (…)

The *Student Missed SMS* preference contains an area where the Student Missed TEXT message and format can be modified. Here is a sample Student Missed Text message taken from our Demo site:

```
                  Appt MISSED #apptcenter# on #apptdate# at
      Student    #appttime#
Missed SMS:       [...]
```
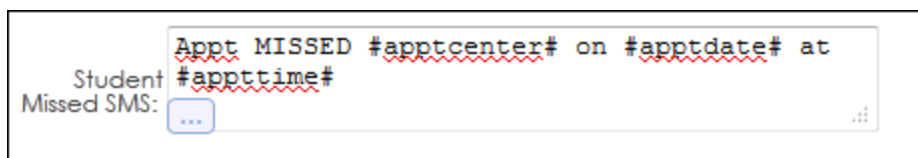
Center's email address

The Center's email address field may contain an email address assigned for your Center. This email address can be set up to receive all confirmation, cancellation, and missed email notifications for all subcenters under a particular Center Profile.

Send immediate:

The Send Immediate preference, if activated, will send all emails immediately. The dropdown menu to the right of this preference determines the format of all emails sent and received.

- 1 - TEXT/HTML/ICAL
  - This preference will allow emails to be formatted via text, html coding, and lastly via iCal attachments for Appointment Confirmations and Cancellations. The iCal attachment allows your Trac system schedule items to transfer over to a MS Outlook, Google, or Apple Calendar. Keep in mind, however, that this is a one way road, and items from MS Outlook, Google, and Apple cannot be sent to your Trac system calendar as Availabilities cannot be translated.

- 2 - HTML/TEXT
  - o This preference will allow for both Text and HTML coding in regards to email formatting.
- 3 – HTML
  - o This preference will allow only HTML coding in regards to email formatting.
- 4 – TEXT
  - o This preference will allow emails to be sent out only in Text format.

Email summary to Center

Activating this preference will email Consultant Schedule Summaries to the Center email address listed above in the *"Center's email address"* field.

Email confirmations to Center

Activating this preference will email Appointment confirmations to the Center email address listed above in the *"Center's email address"* field.

Email cancellations to Center

Activating this preference will email Appointment cancellations to the Center email address listed above in the *"Center's email address"* field.

Email missed messages to Center

Activating this preference will send Missed Appointment notifications to the Center email address listed above in the *"Center's email address"* field.

Send reminders for repeating appointments

Activating this preference will send Email reminders out for repeating or recurring appointments.

Visit Duration Notification (…):

If your center utilizes Reasons that have notification times associated with them (auto-logout or warning after a certain amount of time), this preference contains an area where you can define the email message that is sent to your students. If you want to edit the Reason preferences that determine the length of time and the desired recipient of the message, See *Chapter 6: Reasons*.

Send Visit Notes to Coach or Advisor

- **Activate send notes option on visit entry (also requires Group Pref: Send Notes)**

Activating this preference will proceed to include the "send notes" option during the Visit Entry process or during the Login process. The send notes option will send an email containing any Notes that either consultant or student has entered into the Visit Record.

- **Activate send notes option on visit exit (also requires Group Pref: Send Notes)**

Activating this preference will proceed to include the "send notes" option during the Visit Exit process or during the Logout process. The send notes option will send an email containing any Notes that either consultant or student has entered into the Visit Record.

- **Send notes button will be checked by default**

Activating this preference will automatically check the "send notes" option, by default.

- **Message (…)**

The Message preference contains an area where the "send notes" email message can be modified. Here is an example from the Redrock Demo site.

```
          Coach,

          #name# visited the center on #visitDate# at #visitTime#, we
          had a great session and here are the notes for that session:

          #visitNotes#

Message:  If you have any questions please contact the center at
          480-555-1234.

          Thanks!
          Tutoring Center

          ...
```
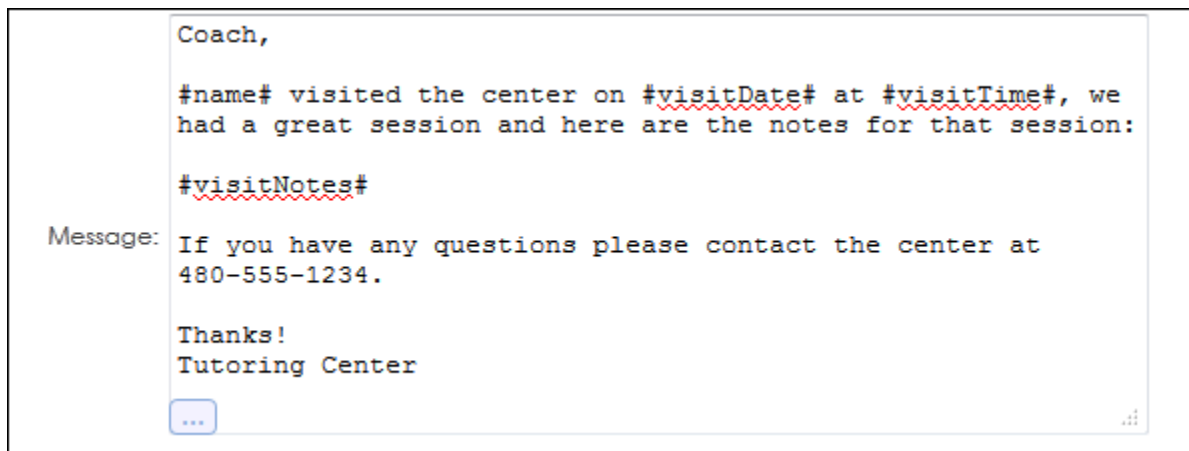
Subject:

The *Subject* preference will contain the Subject of your "send notes" email messages. Here is an example from our Redrock Demo site.

Subject: Message to Coach regarding #vi|

Subject: to Coach regarding #visitfulldate#

To Address (…)

'Who' Label:

The *'Who' Label* field determines what follows after the "send notes to" option. If we are sending visit notes to an Advisor or Coach, we can enter for example "Advisor". The option will then read "Send notes to Advisor" upon Visit Entry or Exit.

Notices

- **Notice to staff:** Clicking on the [...] button brings up a text box. The text you enter here displays on the welcome screen for staff.

- **Notice to consultants:** Clicking on the [...] button brings up a text box. The text you enter here displays on the welcome screen for consultants.

- **Notice to faculty:** Clicking on the [...] button brings up a text box. The text you enter here displays on the welcome screen for faculty.

- **Notice to students:** Clicking on the [...] button brings up a text box. The text you enter here displays on the welcome screen for students.

Student Full Name	#name#
Student Full Name	#student#
Student First Name	#first#
Student Last Name	#last#
Student ID	#ID#
Student ID	#studentID#
Student Other ID	#barcode#
Student Handle	#Account#
Student Street	#Street#
Student Street	#Address#
Student City	#City#
Student State	#State#
Student Zip	#Zip#
Student Street, City, State, Zip	#fullAddress#
Student Email	#studentEmail#
Student Email	#email#
Student Home Phone	#phone#
Student Work Phone	#phone2#
Student Birthdate	#birthdate#
Student Ethnicity	#ethnicity#
Student Major	#major#
Student Cohort	#cohort#
Student Grad_Und	#gradund#
Student College	#college#
Student Class	#class#
Student GPA	#GPA#
Student Accumulated Hours	#TotalHours#

Student Special Status	#status#
Student ReferredBy	#referredby#
Student HS Name	#HSName#
Student Degree Goal	#degree#
Student Custom Field1	#Field1#
Student Custom Field2	#Field2#
Student Custom Field3	#Field3#
Student Custom Field4	#Field4#
Student Custom Field5	#Field5#
Student Custom Field6	#Field6#
Student Custom Field7	#Field7#
Student Custom Field8	#Field8#
Student Custom Field9	#Field9#
Student Custom Field10 --	#Field10#
Student Gender	#gender#
Student Gender	#sex#
Consultant Fields	Consultant Fields
Consultant Full Name	#tutor#
Consultant Full Name	#advisor#
Consultant Full Name	#counselor#
Consultant Full Name	#Staff#
Consultant First Name	#afirst#
Consultant Last Name	#alast#
Consultant First Name	#tfirst#
Consultant Last Name	#tlast#
Consultant Alternate Name	#AltName#
Consultant Email	#tutoremail#
Consultant Email	#advisoremail#
Consultant Email	#staffemail#
Consultant Phone	#tutorPhone#
Consultant Phone	#advisorPhone#
Consultant Phone	#staffPhone#
Consultant CellPhone	#tutorPhone2#
Consultant CellPhone	#tutorCellPhone#
Consultant CellPhone	#advisorCellPhone#
Consultant CellPhone	#staffCellPhone#
Consultant WorkPhone	#tutorWorkPhone#
Consultant WorkPhone	#advisorWorkPhone#
Consultant Pager	#tutorPager#
Consultant Pager	#advisorPager#
Consultant Pager	#staffPager#

Consultant Location	#tLocation#
Consultant Location	#aLocation#
Consultant Location	#sLocation#
Consultant Notes2	#tutorNotes#
Consultant Notes2	#advisorNotes#
Consultant Notes2	#staffNotes#
Current Date Fields	Current Date Fields
Current Date	#date#
Current Time	#time#
Current Day of Week	#apptday#
Appointment Fields	Appointment Fields
Appointment Location	#location#
Appointment Location	#apptlocation#
Appointment Status	#ApptStatus#
Appointment Full Date	#apptfulldate#
Appointment Date	#apptdate#
Appointment Time	#appttime#
Appointment Start Time	#apptstarttime#
Recurring Appointment Start Date	#firstApptDate#
Recurring Appointment End Date	#lastApptDate#
Appointment End Time	#apptendtime#
Appointment Day of Week	#apptday#
Appointment Center	#apptcenter#
Appointment Subject	#apptsubject#
Appointment RequestNotes	#apptrequest#
Appointment OtherNotes	#apptnotes#
Appointment Duration	#apptduration#
Appointment Custom Field	#apptstatus2#
Appointment Custom Field	#apptCust1#
Appointment Fund	#apptfund#
Appointment Total Missed	#missedApptTotal#
Availability Fields	Availability Fields
Availability Location	#availlocation#
Section Fields	Section Fields
Section Term Code	#subject#
Section Term Code	#assistanceIn#
Reason Fields	Reason Fields
Reason	#reason#
Reason	#logType#

Center Fields	Center Fields
Center Name	#center#
Center Sequence	#centerID#
Profile Name	#profileCenter#
Survey Fields	Survey Fields
Survey Response Sequence	#responseID#
Survey Sequence	#surveyID#
Visits Fields	Visits Fields
Visit Date In	#visitDate#
Visit Date In	#dateIn#
Visit Date Out	#dateOut#
Visit Time In	#visitTime#
Visit Time Out	#timeOut#
Visit Total Time	#duration#
Visit Day of Week	#visitday#
Visit Custom Field1	#Custom1#
Visit Custom Field2	#Custom2#
Visit Custom Field3	#Custom3#
Visit Custom Field4	#Custom4#
Visit Custom Field5	#Custom5#
Visit Custom Field6	#Custom6#
Visit Custom Field7	#Custom7#
Visit Custom Field8	#Custom8#
Visit Notes	#visitnotes#
Student Remarks	#visitStudRemarks#
Resources	Resources
Resource Barcode	#resID#
Resource Title	#resTitle#
Resource Description	#resDescrioon#
Resource Due Date	#resDueDate#
Resource LastDateOut	#resDateOut#
Resource LastTimeOut	#resTimeOut#

Chapter 4: Group Access

GROUPS ENTRY
The third area of settings is found in the Groups Entry. The Groups Entry is accessed through the Center Profile and contains settings that apply to the Groups operating within a Center Profile. Because of these Profile-wide implications, the Groups Entry is only accessible to Center Admin and Sys Admin Groups. To access the Groups Entry, first navigate to a Center Profile Entry. The second tab in the Center Profile Entry screens is the Group Access tab. Click on this tab to assign privileges to Groups within this Center.

From the Group Access tab, you can click on the Group name to open the Groups Entry window. The Groups Entry allows you to create the Users that are a part of the group and then enter the specific privileges these users will share within the Trac system.

To get to your Group Access Settings, hover your mouse over the search glass on the Trac Navigation search window and click Center Profiles. *Click on your Center Profile. Select the "Group Access" Tab.*

Center Access

Log Visits To
The Log Visits To setting allows you to determine for which centers this group of users can view and/or log visits from the Log Listing screen. You can choose to assign access to All centers, None of the centers, or select which centers to provide access from the down arrow button. When you select your centers, you can then choose which level of access the users in this Group will have: Log and View Visits; Log Only, No View Visit; or View Only, No Log Visits. This allows you to be very specific when setting your privileges. Some of your groups may only access the Log Listing for specific centers, while other groups may access all or none.

View Schedules
The View Schedules setting allows you to determine for which centers this group of users can view and/or edit the schedules for the consultants. You can choose to assign access to All centers, None of the centers, or select which centers to provide access from the down arrow button. When you select your centers, you can then choose which level of access the users in this Group will have: View Schedule and Edit All; View Schedule and Edit Availabilities Only, No Edit Appointments; View Schedule and Edit Appointments, No Edit Availabilities; or Search Availability Only. This allows you to be very specific when setting your privileges. Some of your groups may only access the Schedule for specific centers, while other groups may access all or none.

View Visits
The View Visits setting allows you to determine for which centers this group of users can view visits from the Visit Listing or Student Visit History screens. You can choose to assign access to All centers, None of the centers, or select which centers to provide access from the down arrow button. This allows you to be very specific when setting your privileges. Some of your groups may only access the visit history for specific centers, while other groups may access all or none.

Report On
The Report On setting allows you to determine for which centers this group of users can run reports. You can choose to assign access to All centers, None of the centers, or select which centers to provide access from the down arrow button. This allows you to be very specific when setting your privileges. Some of your groups may only run reports for specific centers, while other groups may run reports for all or none.

Messages (SysAdmin Group Only)
The Messages setting allows you to determine which types of messages this group of users can view or send. You can choose to assign access to All message types, None of the types, or select which types to provide access from the down arrow button. This allows you to be very specific when setting your privileges. Some of your groups may only access specific messages in the student history, while other groups may access all, or none. Because the Message Types are global to the system, setting group access to the messages is only available to users from the SysAdmin group.

Post Doc Types (SysAdmin Group Only)
The Post Doc Types setting allows you to determine which types of document posts this group of users can view or upload. You can choose to assign access to All Post Doc types, None of the types, or select which types to provide access from the down arrow button. This allows you to be very specific when setting your privileges. Some of your groups may only access specific document types in the student record, while other groups may access all, or none. Because the Post Doc Types are global to the system, setting group access to the Post Doc Types is only available to users from the SysAdmin group.

Access to Lists (SysAdmin Group Only)
The Access to Lists setting allows you to determine which Student Lists this group of users can access. You can choose to assign access to All Student Lists, None of the lists, or select which lists to provide access from the down arrow button. When you select your lists, you can then choose which level of access the users in this Group will have: Search and Edit or Search Only. This allows you to be very specific when setting your privileges. Some of your groups may only access and search specific Student Lists, while other groups may access all, or none. Even though the Student Lists are set up in the Center Profile, they can have global implications so setting group access to the Student Lists is only available to users from the SysAdmin group.

Access to Surveys (SysAdmin Group Only, Requires SurveyTrac Module)
The Access to Surveys setting allows you to determine which surveys this group of users can access. You can choose to assign access to All surveys, None, or select which surveys to provide access from the down arrow button. This allows you to be very specific when setting your privileges. Some of your groups may only access specific surveys, while other groups may access all, or none. Because the SurveyTrac module is global to the system, setting group access to the surveys is only available to users from the SysAdmin group.

Access to Referrals (SysAdmin Group Only, Requires SAGE Module)
The Access to Referrals setting allows you to determine which SAGE Referrals this group of users can access. You can choose to assign access to All referrals, None, or select which referrals to provide access from the down arrow button. When you select your referrals, you can then choose which level of access the users in this Group will have: Create and Edit or View Only. This allows you to be very specific when setting your privileges. Some of your groups may only access specific referrals, while other groups may access all, or none. Because the SAGE Early Warning module is global to the system, setting group access to the referrals is only available to users from the SysAdmin group.

Access to Custom Tabs (SysAdmin Group Only)
The Access to Custom Tabs setting allows you to determine which custom student entry tabs this group of users can view or send. You can choose to assign access to All custom tabs, None of the tabs, or select which tabs to provide access from the down arrow button. This allows you to be very specific when setting your privileges. Some of your groups may only access specific custom tabs in the student entry, while other groups may access all, or none. Because the Custom Student Tabs are global to the system, setting group access to the custom tabs is only available to users from the SysAdmin group.

User List

The User List Tab is where User Accounts are created for the selected Group. Create a new Account by clicking "Create New", and enter a Username and password for the new User. A user can also be "moved" from Group to Group simply by clicking on the icon underneath the Move column.

Kiosk List

The Kiosk List Tab is where Kiosk Accounts are created for the selected Group. Create a new Kiosk by clicking "Create New", and enter a Name for the Kiosk. You can also link the Kiosk to a Subcenter or a Location. You can also modify the functionality of the Kiosk and set it to be able to Log in AND Log out, only Log In, only Log out, or go into Wait list mode.

Scheduling

Allow User to Access Schedule
This preference, when activated, allows the selected Group of users to view and access the Schedule.

Allow User to Create Appointments not linked to Availabilities
This preference, when activated allows the selected Group of users to Create Appointments that do not have any correlation to Availabilities. Similar to Override Privileges, this Preference enables a Group to be able to bend some Scheduling restrictions, in this case, creating appointments not linked to any availabilities.

Allow 'move to' functionality in appointment entry
This preference, when activated, allows the selected Group of users to be able to Move appointments from the Appointment Entry window. This simply allows a group to reschedule an Appointment for a later date if necessary.

Allow 'move to' for moving to other consultants in same center
This preference, when activated, allows the selected Group of users to be able to Move appointments from the Appointment Entry window, but also being able to assign the appointment to other Consultants in the same Center.

Show Consultant Classification on Day Schedule
This preference, when activated, will display for this Group of users the Classifications of Consultants, specifically on the Schedule page. Classifications are typically used for Assigned Advisors, Professional Tutors, Student Tutors, or any sort of classification that separates one Consultant from another, and this preference will display that Classification on the Day Schedule.

Show Consultant Location on Day Schedule
This preference, when activated, will display for this Group of users the Locations of Consultants, specifically on the Schedule page. Typically, Consultant Locations are used for Advising Offices or common Tutoring Areas, but can be used to designate a Location to your Consultants.

Allow User to View Student Phone on Schedule
This preference, when activated, will display for this Group of users the Student Phone number, specifically on the Scheduling page regarding Appointments.

Allow User to View Student Email on Schedule
This preference, when activated, will display for this Group of users the Student email address, specifically on the Scheduling page regarding Appointments.

Student Entry

Allow User to View Student Visit History
This preference, when activated, will allow this Group of users to view Student Profiles, specifically the Visit Records under the History Tab. A student's Visit History includes a detailed description of each Visit that the student made to your subcenters, including Date, Time, Duration, Location, Consultant, and any notes that either student or Consultant had entered into the record.

Allow User to View Student Appointment History
This preference, when activated, will allow this Group of users to view the Appointment History of a Student's Profile. A student's Appointment History includes a detailed description of each Appointment that the student has made, whether these appointments occurred in the past, present, or will occur in the future. Any past appointments will include an Appointment Status (Attended, Missed, Cancelled) as well as any Visit Data Associated with the Appointment – i.e. Date, Time, Duration, Center, Location, Consultant, etc..

Allow User to View Student Resource Usage
This preference, when activated, will allow this Group of users to view the Resources Usage History within a student's profile. History of Resources contains records of any resources the student may have borrowed or checked out from any of your subcenters, including Item ID #s, Item Title, Time checked out and Time returned.

Allow User to View Student Message History
This preference, when activated, will allow this Group of users to view the Message History of a Student's Profile. These messages are typically Appointment Confirmations, Reminders, Cancellation emails, or any global notifications sent out from the Subcenters within your Profile. Any messages sent to a student are recorded and tracked in their profile, and this preference allows a Group of users to be able to access these records.

Allow User to View Student Progress Rpts
This preference, when activated, will allow this Group of users to view the Progress Reports Tab of a Student's Profile. The progress reports tab allows a history of Grades to be stored in the student's record, and this preference enables a Group of Users to be able to access these records.

Allow User to Save Changes to Student Progress Rpts
This preference, when activated, will allow this Group of users to save changes and be able to edit Student Progress Reports.

Allow User to Access Student Document Postings
This preference, when activated, will allow this Group of users to view and access the Document Postings within a Student's Profile. The Documents Tab keeps a record of any documents uploaded to the student's Profile. These documents could be assignments, graduation checksheets, tutoring applications, or any electronic document that is relevant to a student's record.

Allow User to Access Student Semester History
This preference, when activated, will allow this Group of users to view the

Allow User to Access Administrative Document Postings (in Utilities)
This preference, when activated, will allow this Group of users to view the

Allow User to Save changes to Student records
This preference, when activated, will allow this Group of users to be able to SAVE changes to a student's Profile. Any modifications made to a student record, whether it be contact info, visit records or appointment history, must be saved, and so disabling this preference will thus prevent or restrict this Group of Users from editing Student records.

Allow User to Delete Students
This preference, when activated, will allow this Group of users to be able to delete a student's profile. Deletion should not be confused with inactivation, as the former completely removes a student's record, while the latter simply disables the profile. This preference allows a User to completely remove a student's record via deletion.

Restrict To:
The *Restrict To* preference allows an Administrator to restrict a Group from viewing Student Entry Screens or Student Records. This restriction only allows the selected group to be able to view records of Students who are members of a List (for more info see Chapter 14. List Management). The *Restrict To* preference simply allows the selected Group to be able to ONLY view student records if students are on the List that is chosen through this preference.

Student Entry Form:
FULL: Standard Admin Access: Full Standard Admin Access gives this group of users FULL access to a student's record. This includes all additional modules that may be available: SAGE, Whiteboard and Text Alerts, as well as full access to the student's history of records: Visits, Appointments, Registrations, Resources, and Messages.

VIEW1: ViewOnly, No Modify: This preference removes the *"Save"* button on student records for the selected Group, effectively removing this group's ability to change or modify any student records. This preference will only allow this group to View student records.

BRIEF1: ViewOnly, No Modify: This preference, similar to the VIEW1 preference above, removes the "Save" button on student records for the selected group, again removing this group's ability to Save any changes or modify student records. The difference between this preference and the one above

mainly involves the "General Info" tab of a student record, where the majority of contact/demographic information is stored. This preference limits the amount of information that can be viewed, only showing Name, ID, Barcode #, and Email address.

BRIEF2: View Only, Name Only, NO EMAIL, no custom fields: This preference, similar to the BRIEF1 preference above, only allows the selected Group to view student name, ID, and Barcode #, removing Email from display.

BARONLY: View/Save Barcodes: This preference allows the selected Group to only be able to View and Save Barcode numbers within a student Record.

Allow User to Edit Student Passwords (all sysAdmins may edit)
This preference, when activated, will allow this Group of users to edit Student Passwords on a Student's Profile.

Student Search Screens: Allow access
This preference, when activated, allows this Group of users to access the Students Listing. The Students Listing is accessible from the Search Glass on the right side of the Trac Navigation bar. Deactivating this preference removes the Students option from the Search Glass Menu, for the selected Group.

Show Custom Fields on Student Search
This preference, when activated, will display any Custom fields when searching for a Student.

Show Progress Rpts Fields on Student Search
This preference, when activated, will display Progress Report fields when searching for a Student. Contact Redrock support for more information on Progress Reports (support@go-redrock.com)

Default List Name on Student Search:

Allow user to search Visits
This preference, when activated, allows this Group to be able to access the Visits Listing. The Visits Listing is accessible from the Search Glass on the right side of the Trac Navigation bar. Deactivating this preference removes the Visits option from the Search Glass Menu, for the selected Group.

Show Visit Fields on Student Search
This preference, if activated, will display Visit Fields when performing a Search within Student Listings. This allows users to run searches for Students based on Visit criteria, for example, time of visit, total number of visits, visit Center, visit Reason, and visit Section.

Visit Entry Screens: Allow User to Save changes to Visit records
This preference, if activated, allows the selected Group of users to be able to Save changes to Visit Records, effectively allowing this group to modify Visit records.

Allow User to send notes to coach/advisor from Visit Entry
This preference gives a group the ability to "Send Notes" to a coach or advisor from the Visit Entry window, or directly from the Visit Record. The "Send Notes" function allows a user to send any Notes recorded for a visit.

Allow User to Delete Visits
This preference allows a group to Delete Visits or remove Visit Records from the system.

Allow User to Enter a Custom Reason
This preference, when activated, will allow this Group of users to enter a Custom Reason in Visit Records and Appointment Records. Custom Reasons may be created when existing Reasons are not

sufficient to complete a Visit Record. In these situations, a User may need to create a new Custom Reason, in which case this preference will enable this privilege.

Allow User to Enter a Custom Section
This preference, when activated, will allow this Group of users to enter a Custom Section in Visit Records and Appointment Records. Custom Sections may be created when existing Sections are not sufficient to complete a Visit Record. In these situations, a User may need to create a new Custom Section, in which case this preference will enable this privilege.

User may view visits. (Visit Listing)
OWN – User may view their OWN visits.
NONE – User may view NO visits
ALL – User may view ALL visits.
Utilization Tab on Main Menu
This preference, when activated, will display the Utilization Tab for this Group of Users on their Main Menu. The Utilization Tab allows you to quickly view any Visit records that may have occurred in specific date ranges, for example, last week, this month, today, etc…A history of total visits that took place will appear, and users can click on individual visits to access that specific record.

Allow User to edit visit notes from Utilization tab using form:
Include – allows users to
Standard – allows users to Edit Visit Records from the Utilization Tab and the Mini Log List on the Main Menu.
editNotes – allows users to only edit visit Notes on Visit Records from the Utilization Tab and Mini Log List on the Main Menu.

View custom visit fields in student history visit list
This preference, when activated, will display for this Group of users the Visit Custom Fields included in a student's Visit History.

Lock Visits older than days old
This preference, if activated, will lock any Visit Records older than _____ days old. Locking a visit Record will successfully prevent any users from editing the record, with the exception of the case in which a user has sufficient Override privileges (System Administrators). If this preference is activated, Visit Records will lock after the number of days that you set in the "____ days old" field.

Lock Appointments (all but status & notes)
This preference, if activated, will lock any Appointment Records older than _____ days old. Locking an Appointment Record will successfully prevent any users from editing the record, with the exception of the case in which a user has sufficient Override privileges (System Administrators). The Appointment status and Notes fields still be available to edit, as in some cases such as Future appointments, this information will need to be added "after the fact". Appointment Records will lock after the number of days that you set in the "____ days old" field.

Lock status as well
This preference, if activated, will lock Appointment Statuses as well, for the selected Group of users.

Lock notes as well
This preference, if activated, will lock Appointment Notes as well, for the selected Group of users.

Lock SAGE referrals older than days old
This preference, if activated, will lock SAGE Referrals for the selected Group of users after the number of days set in the blank field to the left of "*days old*".

Allow User to Search by Name on Log Listing Users
This preference, if activated, will allow this Group of users to search by Name through the Log Student Window. Entering any text will prompt the System to perform a search for Students by name (minimum of 4 characters) and return with matching results.

Allow User to Search by Name on Log Listing KIOSKs
This preference, if activated, will allow this Group of users to search by Name through the Log Student Window on a KIOSK or Self Sign-in Station. Entering any text will prompt the System to perform a search for Students by name (minimum of 4 characters) and return with matching results

Allow User to Search by Barcode on Log Listing
This preference, if activated, will allow this Group of users to search by Barcode through the Log Student Window. Entering digits into the Log Student window will prompt the System to perform a search for Students by Barcode number (minimum of 4 characters) and return with matching results. Barcode numbers are typically used as a secondary form of ID for KIOSKs.

Allow User to Create Student when Not Found
This preference, if activated, will allow this Group of users to create a new Student Profile when an ID number is not found (in the Log Student Window).

Allow User to Edit Students on Log Listing/Appts
This preference, if activated, will allow this Group of users to Edit a Student's Profile from either the Log Listing Window, or Appointment Entry Window. The modification of a Student's Profile could involve fields ranging from ID #, Birthday, Email Address, to College, GPA, or Ethnicity.

Allow User to Log Resources in and out
This preference, if activated, will allow this Group of users to Log resources in and out to students. This preference gives the selected Group of Users the ability to check these resources in and out to students who may need to borrow any resources available at your Subcenters.

Allow User to view logged out items on log listing
This preference, if activated, will allow this Group of users to view any resources checked out to students, specifically on the Log Listing. The Log Listing, while displaying the students currently logged in to your Subcenters, can through this preference also display any Resources that students may have checked out.

Allow User to view work visits on log listing
This preference, if activated, will allow this Group of users to view Work Visits on the Log Listing. Work Visits are typically used for Consultants to log payroll hours. In this case, these work visits do not appear for the average user on the Log Listing, so as to only display students' visits. This preference enables that privilege.

Show student photos on listing
This preference, if activated, will display student photos on the Log Listing for the selected Group.

Show Visit Center on log listing
This preference, if activated, will display the Center of Visit on the Log Listing for the selected Group.

Show Visit Reason on log listing
This preference, if activated, will display the Reason of Visits on the Log Listing for the selected Group.

Show Visit Subject on log listing
This preference, if activated, will display Subject of Visits on the Log Listing for the selected Group

Use Larger Font on Log Student Dialog (inactive):

Use Larger Font on Log Student Dialog (active):

Show SI Batch Entry Option
Activating this preference gives the selected Group the ability to enter Batch Visits through the

Create a **Batch Visit**   link on the Main Menu.

Show Visit Batch Entry Option
Activating this preference gives the selected Group the ability to enter Batch Visits within the Visits
Listing, accessible through the Visits menu option in the Search Glass.

Show Visit Scans Batch Import (customization required by Redrock Software)
Activating this preference gives the selected Group the ability to enter Batch Visits through the Batch
Scan Utility. Email support@go-redrock for more details.

Allow user to track attendance (only centers where log visit is enabled)
Activating this preference allows the selected Group the ability to track Attendance. Attendance can
be tracked much like SI Batch Visits in that attendance is marked by Section. Checkboxes populate for
each student enrolled in a particular section, and attendance can be marked simply by checking the
checkboxes. Attendance can also be recorded with a visit Center and a visit Reason.

Constrain center to: ( )
In regards to Attendance, selecting a Center for this preference will proceed to allow this Group to
ONLY mark attendance for the selected Center. When opening the Attendance Utility, the Center
dropdown will only contain the one Center determined through this preference.

Constrain reason to: ( )
In regards to Attendance, selecting a Reason for this preference will proceed to allow this Group to
ONLY mark attendance for the selected Reason. When opening the Attendance Utility, the Reason
dropdown will only contain the one Reason determined through this preference.

Constrain students visible: ( )
In regards to attendance, selecting a List for this preference will limit this Group to only being able to
mark attendance for students on the selected List. For more details on student Lists, see Chapter 14:
List Management).

No Reg (use list only)
If this preference is activated, student registrations or enrollment will not be taken into consideration
in regards to attendance. Only students on the selected list will be able to be marked for attendance.

Allow User to Manage Resources

This preference, if activated, will add access to the "Resources" Listing for the selected group of users. The Resources Listing simply lists all available resources at your Subcenters, and allows users to edit Resource information as well as check items in and out to students. The Resources Listing, if activated, will be accessible through the Search Glass in the Trac Navigation bar.

Allow User to Manage Room Scheduling

Allow User to View Modifications Logs

This preference, if activated, allows the selected Group of users to view the Modification Logs, or Log Mods for short. The Log Mods are basically records kept of ALL actions taken on your Trac System. The time any "action" was taken is recorded, as well as what pages were accessed, and who (username and IP address) performed the action. Log Mods are highly beneficial for troubleshooting purposes, but not completely necessary for every campus.

Override Appt Rules (Deletions, Creations, etc.)

This preference, if activated, allows the selected Group of users to Override Appt Rules. Appointment Rules may include the Max # of Appointments made per week, Max # of appointments made per center, Max # of missed appointments, or Minimum of 24 hours previous to booking an Appointment, etc...Any of these rules may be broken by the selected Group, if this preference is activated. Be cautious of which groups you assign this privilege to, as typically, these Appointment rules exist for a reason.

Override Lock Visits

This preference, if activated, allows the selected Group of users to Override Locked Visits. Visits may be locked through a Center Profile Preference *(see Chapter 11: Visits - Log Students In / Out TECH*

INFO – Preference: Autolock Visits older than (____) days), and activating this Preference will allow the selected Group to be able to edit Visit Data for Locked Records.

Allow User to Access Campus Custom Utilities

This preference, if activated, allows the selected Group of users to access the Campus Custom Utilities, located in the System Prefs. The Custom Utility contains important administrative utilities that can be used for advanced functions.

Allow User to Access System Prefs (must also be either a Center Admin or Sys Admin)

This preference, if activated, allows the selected Group of users to access the System Prefs Tab of the Utilities & Prefs menu. The System Prefs tab contains a variety of useful Administrative tools including the Campus Name preference, Current Term, Login Instructions, Message Types, Semester End/Start Dates, Standard Student Fields, and Watch List Indicators setup preferences.

Allow User to Access Payroll Reports

This preference, if activated, allows the selected Group of users to have Access to the Payroll category of Reports. Payroll reports typically deal with Work Reasons, Consultant Hours, Pay Rate, or any reports that involve Funds.

Allow User to Edit Consultants from Schedule

This preference, if activated, allows the selected Group of users to Edit Consultants' Profiles from the Schedule. In the Personnel Listing on the left side, a "head and shoulder" icon will appear, allowing the selected Group of users to access a Consultant's profile by clicking on this icon.

Allow User to Access Consultant Document Postings

This preference, if activated, allows the selected Group of users to be able to access Document Postings within Consultant Profiles. Documents can be uploaded directly to a Consultant record and can be recorded and tracked from the Consultant Profile.

WHITEBOARD

Allow User to Create Online Sessions

This preference, if activated, gives the selected Group of Users access to the Management Functions of the add-on Whiteboard Module (contact Redrock support for more details – support@go-redrock.com). The Whiteboard Management Utility can be accessed through the TracMan icon in the Trac Navigation bar.
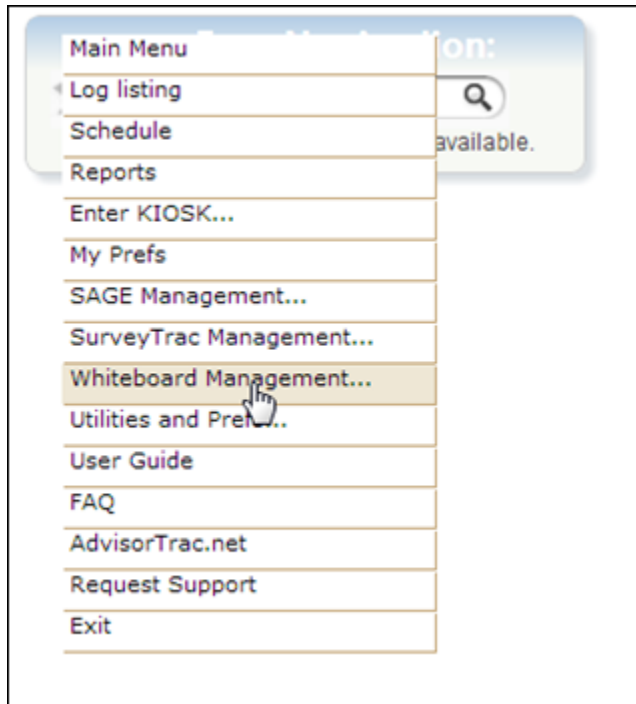
SURVEYTRAC

Allow Access to Surveys

This preference, if activated, gives the selected Group of Users access to the Management Functions of the add-on SurveyTrac Module. Access includes the ability to create surveys, edit surveys, or view existing surveys. The SurveyTrac Management Utility, if activated, can be located through the Trac Man icon in the Trac Navigation Bar.

SAGE

Allow Access to SAGE Management functions

This preference, if activated, gives the selected Group of Users access to the Management Functions of the add-on SAGE module. Access includes the ability to create referrals, edit referrals, or view existing referrals through the Sage Management Utility. The Sage Management Utility, if activated, can be located through the Trac Man icon in the Trac Navigation Bar.

Allow User to view SAGE Referrals

   This preference, if activated, allows the selected Group of Users to VIEW Sage Referrals specifically in a *Student's Profile*. The SAGE tab will appear in a Student's record, and a history of Referrals for the selected Student can be VIEWED directly from their Profile. If this preference is NOT active, the SAGE tab will not appear in a Student's Profile.

Restrict SAGE referrals to own

This preference, if activated, allows the selected Group of Users to only VIEW their OWN Sage Referrals specifically in a *Student's Profile*. For example, if Consultant Jon Halter (member of the Consultant Group) had filled out Referrals for some of his students that came in for tutoring, he would only be able to VIEW the Referrals that he himself created, in the respective Student's Profile.

Allow User to Create/Edit SAGE Referrals

This preference, if activated, allows the selected Group of Users to both CREATE and EDIT Sage Referrals, specifically in a *Student's Profile*. The SAGE tab will appear in a Student's record, and a Referral for the selected Student can be CREATED directly from their Profile. Any existing Referrals can also be EDITED directly from the selected Student's Profile.

Allow User to define custom fields

This preference, if activated, gives the selected Group of Users the ability to define Custom Fields when creating Referrals. Custom Fields or Questions can be created to gather additional feedback either from the Consultant, Student, Faculty Member, or perhaps even a Dean or Counselor.

TEXT ALERTS

Default Text to Student from Log Listing

Enter in this field the Default Text message that may be sent to Students directly from the Log Listing.

Default Text to Consultant from Log Listing

Enter in this field the Default Text message that may be sent to Consultants directly from the Log Listing.

Allow User to Generate Activation Code for Student

In order for students to receive Text Message notifications, they must first opt in to the program. To do this, an Activation code needs to be generated and sent from the student's phone. This preference allows a user to generate that Activation Code for the student, so that they can opt in to the Text Alert Program.

Restrictions

Restrictions to Sensitive Data

Prevent access to Reports Chooser
This preference restricts the selected Group of Users from accessing the Report Chooser.

Prevent access to Group Preferences
This preference restricts the selected Group of Users from accessing the Group Access Preferences.

Prevent access to Group Restrictions Tab
This preference restricts the selected Group of Users from accessing the Group Access – Restrictions Tab.

Prevent access to Group Favorite Reports
This preference restricts the selected Group of Users from accessing the Favorites Category of Reports.

Prevent access to My Prefs to Personalize Main Menu
This preference restricts the selected Group of Users from accessing the My Prefs Menu.

Prevent User from Viewing Student IDs in Appointments and Log Listing1
This preference restricts the selected Group of Users from being able to view Student ID #s both in the Appointments Entries and Log Listing pages. Activating this preference will hide Student ID #s.

Prevent User from Viewing Grades in Progress Reports and Registrations
This preference restricts the selected Group of Users from being able to view students' Grades both in Progress Reports and Registrations.

Prevent User from Viewing Info Tabs in Student Entry
This preference restricts the selected Group of Users from viewing ANY info tab in a Student's Profile or Record.

Prevent User from Viewing Info Tabs: Basic Info
This preference restricts the selected Group of Users from viewing the Basic Info Tab of the Student's Profile. The Basic Tab contains basic contact info such as Name, Email, and Birthdate, and demographic info such as Gender, Ethnicity, and Major.

Prevent User from Viewing Info Tabs: Custom Campus
This preference restricts the selected Group of Users from viewing the Custom Campus Tab of the Student's Profile. The Custom Campus Tab contains the 9 available Custom Fields which may track any information you deem relevant.

Prevent User from Viewing Info Tabs: Center Info
This preference restricts the selected Group of Users from viewing the Center Info Tab of the Student's Profile. The Center Info Tab contains the Center Status information of a student: how many appointments they've missed, and their resulting status (i.e. Banned, Probation)

Prevent User from Viewing Info Tabs: Lists
This preference restricts the selected Group of Users from viewing the Lists Tab of the Student's Profile. The Lists Tab will display any Lists the student may be a part of.

Prevent User from Viewing Info Tabs: Schedule
This preference restricts the selected Group of Users from viewing the Schedule Tab of the Student's Profile. The Schedule Tab contains the Student's Class Schedule.

Prevent User from booking appointment on schedule
This preference restricts the selected Group of Users from booking Appointments through your Trac Schedule. Activating this preference will remove the blue dropdown arrow next to appointments on the Schedule, but will not remove the ability to Book appointments through the Search for Availabilities.

Prevent User/Consultant from Editing Specialties
This preference restricts the selected Group of Users from editing Consultant Specialties, including both Subject Specialties and Reason Specialties. Activating this preference will take away the ability to click on the checkboxes next to Sections and Reasons within the Subject Specialties and Reason Specialties Tab, but won't remove the Tabs altogether.

Prevent User/Consultant from Editing Consultant Bio
This preference restricts the selected Group of Users from being able to edit any Consultant's Bio. This includes the entire Consultant's Profile. Activating this preference will remove the SAVE button from a Consultant's Profile.

Prevent User from Terminating Visits From Log Listing
This preference removes from the selected Group of Users the ability to Terminate visits from the Log Listing. Activating this preference will remove the Red Circular Terminate icon.

Prevent User from Searching 'Work' Visits
This preference prevents the selected Group of Users from being able to search for "Work" Visits, or Visits made by Consultants with student accounts to track payroll hours.

Prevent User from Sending Messages to SELECTED Students
This preference, if activated, restricts the user from sending messages to multiple students, or students found via search. The "Send HTML Note" function that is located in the List Options within Student Listings will not be available if this restriction is activated.

Prevent User from Creating Messages for Students
This preference restricts the selected Group of Users from using the "Create an HTML note" function to send emails to Students. This preference will restrict access to ALL messages, including email and Text.

Prevent User from Changing Appointment Data except Appointment Status
This preference restricts the selected Group of Users from changing ANY appointment data, with the exception of the Appointment Status (Attended, Missed, Cancelled). Activating this preference will deactivate ALL dropdown menus, text fields, or

Prevent User from Cancel/Deleting Appointment (or change status to cancel/delete)
This preference restricts the selected Group of Users from Cancelling or Deleting Appointments. Activating this preference disables key fields in the Appointment Entry Window.

Prevent User from Moving Appointment
This preference restricts the selected Group of Users from Moving Appointments by removing the "Move To" function from the Appointments Entry window.

Restrictions to User Modification

Prevent User from Creating Users
This preference restricts the selected Group of Users from being able to Create User Profiles through the Group Access Tab.
Prevent User from Editing Users
This preference restricts the selected Group of Users from being able to Edit User Profiles through the Group Access Tab.

Prevent User from Deleting Users
This preference restricts the selected Group of Users from being able to Delete User Profiles through the Group Access Tab.

My Prefs

The fourth area of settings involves the personal preferences that users can choose to customize the Trac system for their personal user accounts. The My Prefs options include adding some Widgets to the Main Menu, such as a Mini Log Listing, Reports, custom window colors, Weekly Tip, and a custom RSS news feed. Keep in mind that the user's ability to enable some of these preferences is dependent upon the access provided them through their assigned Group.

To get to your *My Prefs*, click on the TracMan Icon on the left side of the Trac Navigation. Select *My Prefs*.

Main Menu Options

Quick Reports
Activating this preference will add the Quick Reports Link to the User's Main Menu. A link to the Custom Report Wizard will also be added along with the Quick Reports Link.

Calendar
Activating this preference will add the Appointments link section to the User's Main Menu. Included in the Appointments section is the link to view the Schedule, as well as the link to Search for Availabilities.

Messages
Activating this preference will add the "Trac Admin Messages" window to the User's Main Menu. Here, messages sent by Administrators can be tracked and monitored.

Mini Log List
Activating this preference will add the Mini Log List to the User's Main Menu. The Mini Log List gives a Snapshot View of the students currently logged into your Subcenters. Students can be logged in and out of the system directly through the Mini Log List.

Quick Visit
Activating this preference will add both the Quick Visit Utility and Batch Visit Utility to the User's Main Menu. (See Chapter 11:Visits – Quick Visits – User Info)

Tip of the Week
Activating this preference will add the "Tip of the Week" widget to the User's Main Menu. The Tip of the Week is provided by Redrock Software and contains helpful hints and tips to using the Trac system.

Color Picker
Activating this preference will add the Color Picker Tool to the User's Main Menu. The Color Picker allows a user to customize some of the header, background and foreground colors, so that users' Trac systems can be personalized.

Center Status
Activating this preference will add the "Center Status" Tab to the User's Main Menu. The Center Status Tab will be located in the center of the Main Menu to the right of the "Welcome" Tab. The Center Status Tab will include Appointment and Visit Data for the user, and the resulting Status of the user if one exists.

Refresh Cache (temp tool)
Activating this preference will add the "Refresh Cache" Utility to the User's Main Menu. The Refresh Cache Utility allows a user to refresh the cache of the server, which basically clears temporary files.

News Feed
Activating this preference will add the "News Feed" widget to the User's Main Menu. Any News Feed that is based off of an RSS feed may be added here, as long as the URL is entered in the field below: "Feed URL".

- **Feed URL:** Here is where you enter the URL of your RSS News Feed.

Every Page

AdvisorTrac Ticker Sound On

Activating this preference will turn the AdvisorTrac Ticker sound ON. The Ticker is located in the Trac Navigation bar in the upper left corner and basically notifies Consultants or Admins if there are students "waiting" to be seen with a sound Alert.

Log Student (at top of every page):

Activating this preference will add the Log Student Window at the top of every page.

Log Resource (at top of every page):

Activating this preference will add the Log Resource Window at the top of every page.

Scheduling

Schedule Start Time:

This preference determines the Start Time of your Schedule.

End Time:

This preference determines the End Time of your Schedule.

Log Listing

Remember Last Search Criteria
Activating this preference will prompt the system to remember your last search criteria. This includes search terms entered into the Trac Navigation bar.

Groups

Groups control user access levels to various screens, functions, and centers within your Trac application. You can establish an unlimited number of groups to provide different access privileges for your users. User accounts (all users except Consultants) are created through the Group. You can also create student self sign-in stations called Kiosks through your Group Entry Screens. Consultants are the only type of User assigned to their group outside of the Group Entry preferences. A very simple Trac system might only have three groups to control access, while a very advanced Trac system might have 30 or more Groups to facilitate the appropriate levels of privileges.

To get to your Group Access Settings, hover your mouse over the search glass on the Trac Navigation search window and click Center Profiles. *Click on your Center Profile. Select the "Group Access" Tab.*
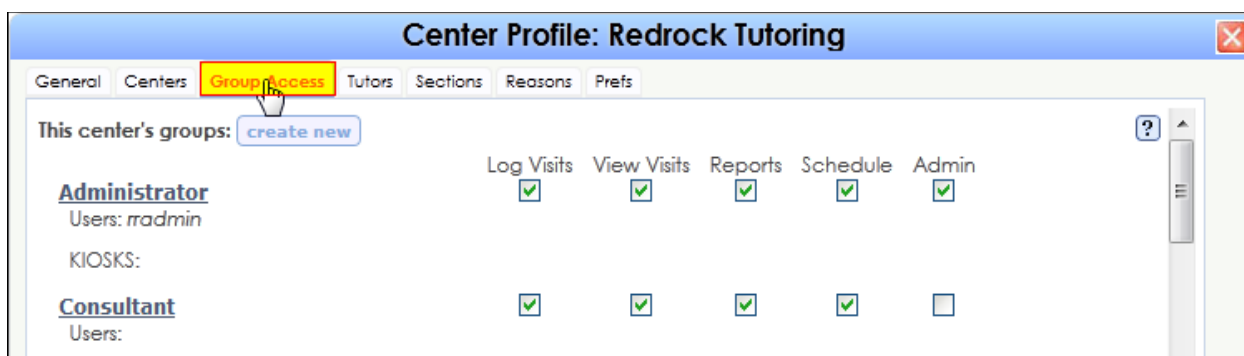
By default, the Sys Admin, Administrator, Front Desk Workers, Consultant, Faculty and Student Groups have already been created.

Click the *Administrator* Group.
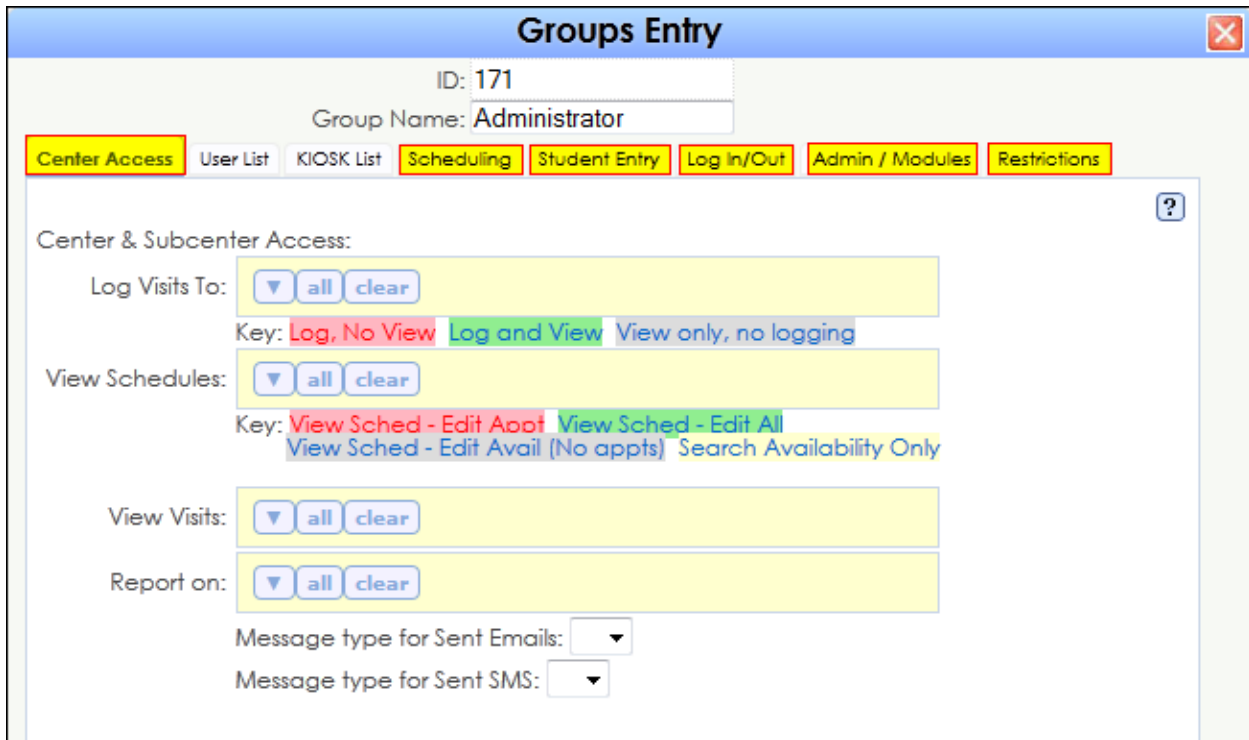
The Group Entry screen has several tabs that organize the access settings. The Center Access tab controls which centers the Group members can access through the Log Listing, Visits, Appointment Schedules, and Report functions. Additional tabs control the user options for Scheduling, Log Listing, Administrative rights, Modules, and access to the Student and Visit Entry screens.

Creating a New User: User List

Click the *User List* tab to create a New User. Under the User List section, click the *Create New* button.
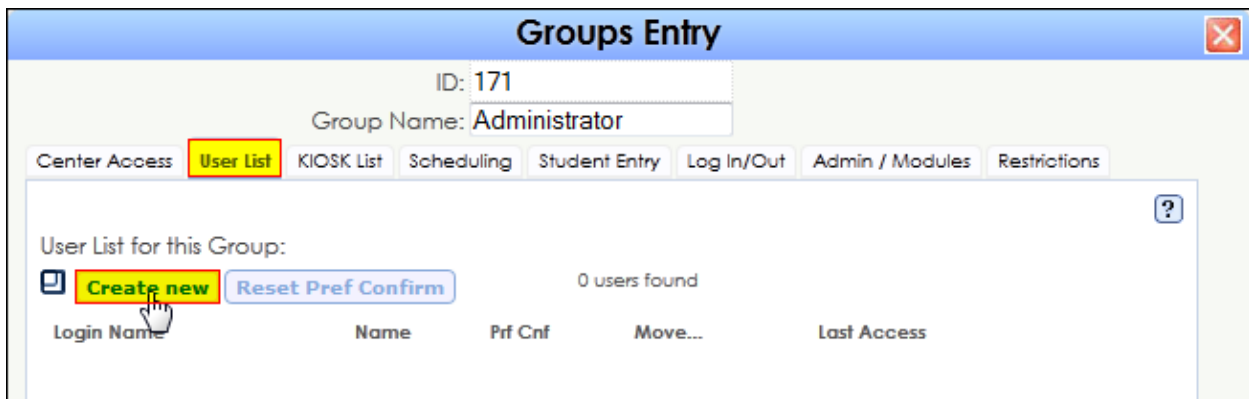
Enter a Name, Login Name, and Password for the user. Then click *Save User* to save the Record.

The User List now includes your newly created account.

Assigning Subcenter Privileges: Center Access

Now click the *Center Access* Tab.

The Center Access tab allows you to assign center-specific privileges to the members of this Group. You can select which level of access this Group will have to the Log Listing, Visit Records, Appointment Schedules, and Reports for each of your subcenters. This tab also controls access to Messages, Document Posts, Student Lists, Surveys (for SurveyTrac Users), and SAGE Referrals (for SAGE users). Keep in mind that these additional areas (messages, doc posts, stud lists) are only accessible through the SysAdmin group.

Administrator Group example:

SysAdmin Group example:

If a Group should have Access to a Subcenter in one of these areas, then click on the blue dropdown Arrow [▼] button to view your list of subcenters.
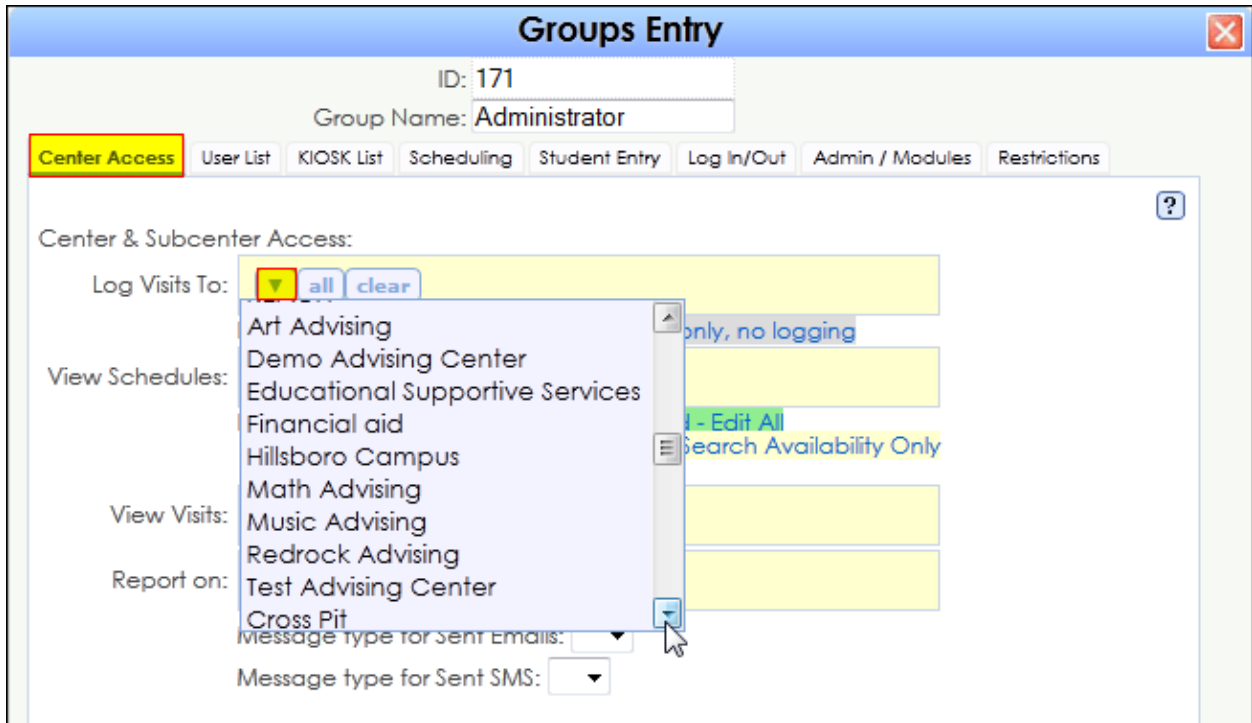
Select the appropriate center(s) from the list of subcenters.
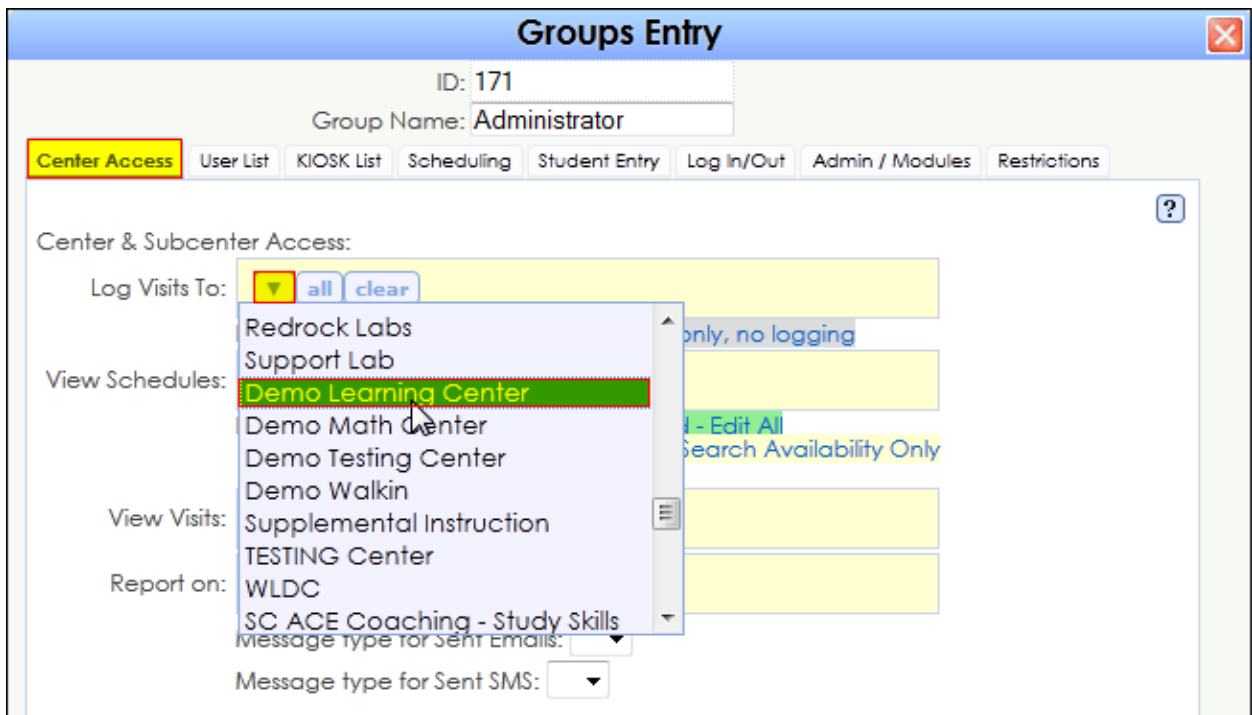
Repeat this process for each of the Center Access options: Log Visits To, View Schedules, View Visits, and Report on. Now the members of this Group will be able to access these areas for the appropriate Subcenters.

You can also control the level of access this Group has to *Log Visits* for the selected Subcenters. By clicking on a subcenter name, it will toggle between the access options.

Log and View – Users in this group can log a student into this center for a visit, as well as view the list of students that are currently into this center.

View only, no logging – Users in this group can view the list of students that are currently signed into this center, but cannot log a student into this center.

,
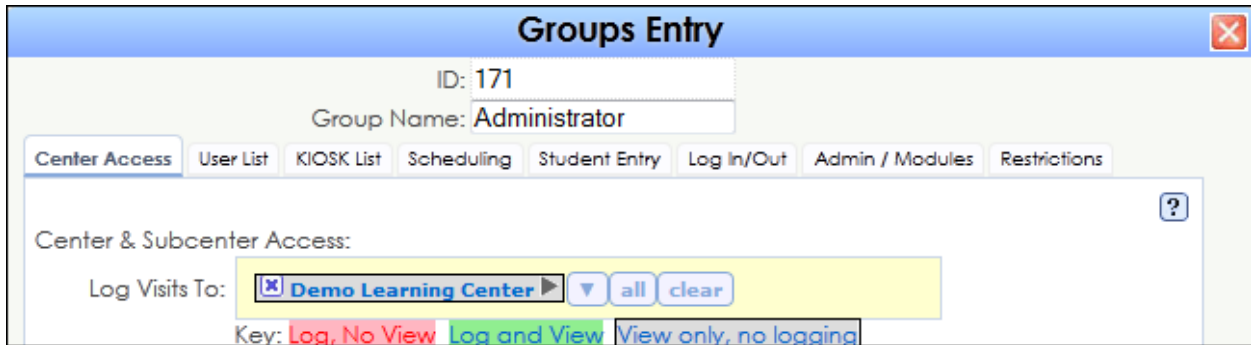
Log, No View – Users in this group can log a student into this center, but cannot view the list of students that are currently signed into this center.
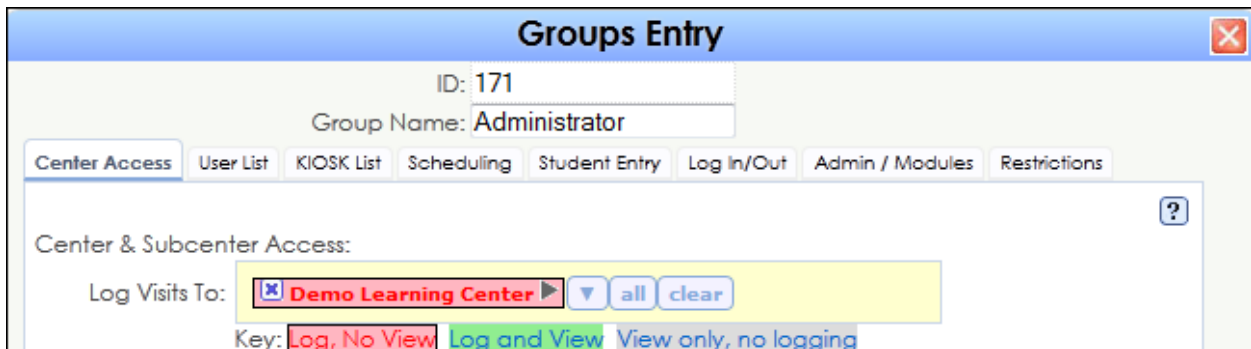
You can also control the level of access this Group has to *View Schedules* for the selected Subcenters. By clicking on a Subcenter name, it will toggle between the access options.

View Sched – Edit All – Users in this group can view the full schedule for this center, create available times for Consultants, book appointments with students, and search for appointments for this center from the Search Availability Screen.
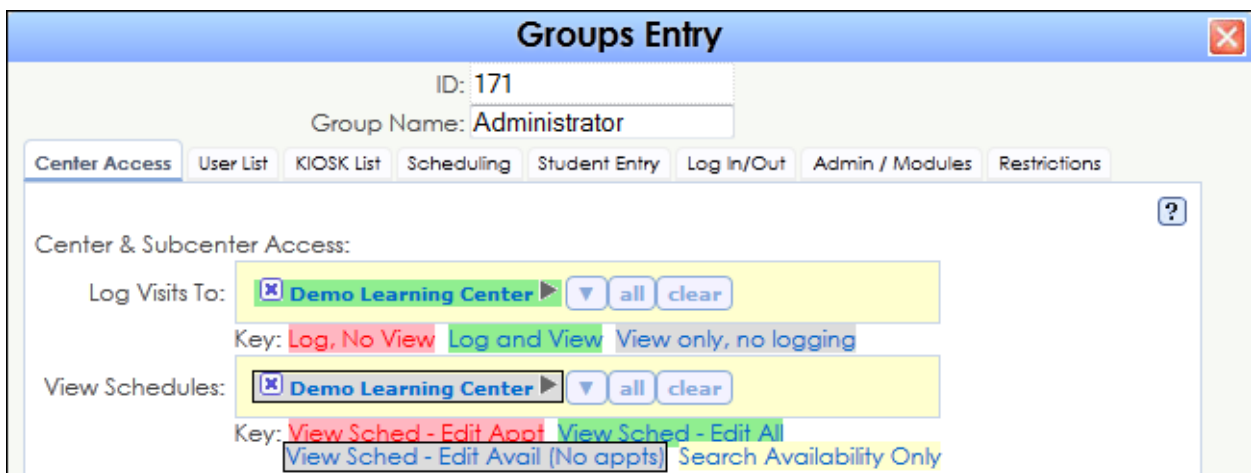
View Sched – Edit Avail (No appts) – Users in this group can view the full schedule for this center and create available times for Consultants, but cannot book appointments with students or use the Search Availability screen to search for available appointment times.

Search Availability Only – Users in this group can utilize the Search Availability screen to search for available appointment times and book appointments with students, but cannot view the full schedule for this center or create available times for Consultants.

Scheduling

Click the *Scheduling* Tab. The Scheduling tab allows you to assign Scheduling privileges to the members of this Group. You can assign the level of access this Group will have to various features on the Schedule. Check the boxes next to each preference to provide access to scheduling functions.

Allow User to Access Schedule
This preference, when activated, allows the selected Group of users to view and access the Schedule.

Allow User to Create Appointments not linked to Availabilities
This preference, when activated allows the selected Group of users to Create Appointments that do not have any correlation to Availabilities. Similar to Override Privileges, this Preference enables a Group to be able to bend some Scheduling restrictions, in this case, creating appointments not linked to any availabilities.

Allow 'move to' functionality in appointment entry
This preference, when activated, allows the selected Group of users to be able to Move appointments from the Appointment Entry window. This simply allows a group to reschedule an Appointment for a later date if necessary.

Allow 'move to' for moving to other consultants in same center
This preference, when activated, allows the selected Group of users to be able to Move appointments from the Appointment Entry window, but also being able to assign the appointment to other Consultants in the same Center.

Show Consultant Classification on Day Schedule
This preference, when activated, will display for this Group of users the Classifications of Consultants, specifically on the Schedule page. Classifications are typically used for Assigned Advisors, Professional Tutors, Student Tutors, or any sort of classification that separates one Consultant from another, and this preference will display that Classification on the Day Schedule.

Show Consultant Location on Day Schedule
This preference, when activated, will display for this Group of users the Locations of Consultants, specifically on the Schedule page. Typically, Consultant Locations are used for Advising Offices or common Tutoring Areas, but can be used to designate a Location to your Consultants.

Allow User to View Student Phone on Schedule
This preference, when activated, will display for this Group of users the Student Phone number, specifically on the Scheduling page regarding Appointments.

Allow User to View Student Email on Schedule
This preference, when activated, will display for this Group of users the Student email address, specifically on the Scheduling page regarding Appointments.

Student Entry

Click the *Student Entry* Tab. The Student Entry tab allows you to assign levels of access to both student and visit data to the members of this Group. You can provide this Group with access to search and edit students and visits by checking the appropriate boxes.

Allow User to View Student Visit History
This preference, when activated, will allow this Group of users to view Student Profiles, specifically the Visit Records under the History Tab. A student's Visit History includes a detailed description of each Visit that the student made to your subcenters, including Date, Time, Duration, Location, Consultant, and any notes that either student or Consultant had entered into the record.

Allow User to View Student Appointment History
This preference, when activated, will allow this Group of users to view the Appointment History of a Student's Profile. A student's Appointment History includes a detailed description of each Appointment that the student has made, whether these appointments occurred in the past, present, or will occur in the future. Any past appointments will include an Appointment Status (Attended, Missed, Cancelled) as well as any Visit Data Associated with the Appointment – i.e. Date, Time, Duration, Center, Location, Consultant, etc..

Allow User to View Student Resource Usage
This preference, when activated, will allow this Group of users to view the Resources Usage History within a student's profile. History of Resources contains records of any resources the student may have borrowed or checked out from any of your subcenters, including Item ID #s, Item Title, Time checked out and Time returned.

Allow User to View Student Message History
This preference, when activated, will allow this Group of users to view the Message History of a Student's Profile. These messages are typically Appointment Confirmations, Reminders, Cancellation emails, or any global notifications sent out from the Subcenters within your Profile. Any messages sent to a student are recorded and tracked in their profile, and this preference allows a Group of users to be able to access these records.

Allow User to View Student Progress Rpts
This preference, when activated, will allow this Group of users to view the Progress Reports Tab of a Student's Profile. The progress reports tab allows a history of Grades to be stored in the student's record, and this preference enables a Group of Users to be able to access these records.

Allow User to Save Changes to Student Progress Rpts
This preference, when activated, will allow this Group of users to save changes and be able to edit Student Progress Reports.

Allow User to Access Student Document Postings
This preference, when activated, will allow this Group of users to view and access the Document Postings within a Student's Profile. The Documents Tab keeps a record of any documents uploaded to the student's Profile. These documents could be assignments, graduation checksheets, tutoring applications, or any electronic document that is relevant to a student's record.

Allow User to Access Student Semester History
This preference, when activated, will allow this Group of users to view the

Allow User to Access Administrative Document Postings (in Utilities)
This preference, when activated, will allow this Group of users to view the

Allow User to Save changes to Student records
This preference, when activated, will allow this Group of users to be able to SAVE changes to a student's Profile. Any modifications made to a student record, whether it be contact info, visit records or appointment history, must be saved, and so disabling this preference will thus prevent or restrict this Group of Users from editing Student records.

Allow User to Delete Students
This preference, when activated, will allow this Group of users to be able to delete a student's profile. Deletion should not be confused with inactivation, as the former completely removes a student's record, while the latter simply disables the functionality of the profile. This preference allows a User to completely remove a student's record via deletion.

Restrict To:
The *Restrict To* preference allows an Administrator to restrict a Group from viewing Student Entry Screens or Student Records. This restriction only allows the selected group to be able to view records of Students who are members of a List (for more info see Chapter 14. List Management). The *Restrict To* preference simply allows the selected Group to be able to ONLY view student records if students are on the List that is chosen through this preference.

Student Entry Form:
FULL: Standard Admin Access: Full Standard Admin Access gives this group of users FULL access to a student's record. This includes all additional modules that may be available: SAGE, Whiteboard and Text Alerts, as well as full access to the student's history of records: Visits, Appointments, Registrations, Resources, and Messages.

VIEW1: ViewOnly, No Modify: This preference removes the "*Save*" button on student records for the selected Group, effectively removing this group's ability to change or modify any student records. This preference will only allow this group to View student records.

BRIEF1: ViewOnly, No Modify: This preference, similar to the VIEW1 preference above, removes the "Save" button on student records for the selected group, again removing this group's ability to Save any changes or modify student records. The difference between this preference and the one above mainly involves the "General Info" tab of a student record, where the majority of contact/demographic information is stored. This preference limits the amount of information that can be viewed, only showing Name, ID, Barcode #, and Email address.

BRIEF2: View Only, Name Only, NO EMAIL, no custom fields: This preference, similar to the BRIEF1 preference above, only allows the selected Group to view student name, ID, and Barcode #, removing Email from display.

BARONLY: View/Save Barcodes: This preference allows the selected Group to only be able to View and Save Barcode numbers within a student Record.

Allow User to Edit Student Passwords (all sysAdmins may edit)
This preference, when activated, will allow this Group of users to edit Student Passwords on a Student's Profile.

Student Search Screens: Allow access
This preference, when activated, allows this Group of users to access the Students Listing. The Students Listing is accessible from the Search Glass on the right side of the Trac Navigation bar. Deactivating this preference removes the Students option from the Search Glass Menu, for the selected Group.

Show Custom Fields on Student Search
This preference, when activated, will display any Custom fields when searching for a Student.

Show Progress Rpts Fields on Student Search
This preference, when activated, will display Progress Report fields when searching for a Student. Contact Redrock support for more information on Progress Reports (support@go-redrock.com)
Default List Name on Student Search:

Allow user to search Visits
This preference, when activated, allows this Group to be able to access the Visits Listing. The Visits Listing is accessible from the Search Glass on the right side of the Trac Navigation bar. Deactivating this preference removes the Visits option from the Search Glass Menu, for the selected Group.

Show Visit Fields on Student Search
This preference, if activated, will display Visit Fields when performing a Search within Student Listings. This allows users to run searches for Students based on Visit criteria, for example, time of visit, total number of visits, visit Center, visit Reason, and visit Section.

Visit Entry Screens: Allow User to Save changes to Visit records
This preference, if activated, allows the selected Group of users to be able to Save changes to Visit Records, effectively allowing this group to modify Visit records.

Allow User to send notes to coach/advisor from Visit Entry
This preference gives a group the ability to "Send Notes" to a coach or advisor from the Visit Entry window, or directly from the Visit Record. The "Send Notes" function allows a user to send any Notes recorded for a visit.

Allow User to Delete Visits
This preference allows a group to Delete Visits or remove Visit Records from the system.

Allow User to Enter a Custom Reason
This preference, when activated, will allow this Group of users to enter a Custom Reason in Visit Records and Appointment Records. Custom Reasons may be created when existing Reasons are not sufficient to complete a Visit Record. In these situations, a User may need to create a new Custom Reason, in which case this preference will enable this privilege.

Allow User to Enter a Custom Section
This preference, when activated, will allow this Group of users to enter a Custom Section in Visit Records and Appointment Records. Custom Sections may be created when existing Sections are not sufficient to complete a Visit Record. In these situations, a User may need to create a new Custom Section, in which case this preference will enable this privilege.
User may view visits. (Visit Listing)
OWN – User may view their OWN visits.
NONE – User may view NO visits
ALL – User may view ALL visits.
Utilization Tab on Main Menu
This preference, when activated, will display the Utilization Tab for this Group of Users on their Main Menu. The Utilization Tab allows you to quickly view any Visit records that may have occurred in specific date ranges, for example, last week, this month, today, etc…A history of total visits that took place will appear, and users can click on individual visits to access that specific record.

Allow User to edit visit notes from Utilization tab using form:
Include -
Standard - allows users to Edit Visit Records from the Utilization Tab and the Mini Log List on the Main Menu.
editNotes - allows users to only edit visit Notes on Visit Records from the Utilization Tab and Mini Log List on the Main Menu.

View custom visit fields in student history visit list
This preference, when activated, will display for this Group of users the Visit Custom Fields included in a student's Visit History.

Lock Visits older than days old
This preference, if activated, will lock any Visit Records older than _____ days old. Locking a visit Record will successfully prevent any users from editing the record, with the exception of the case in which a user has sufficient Override privileges (System Administrators). If this preference is activated, Visit Records will lock after the number of days that you set in the "_____ days old" field.

Lock Appointments (all but status & notes)
This preference, if activated, will lock any Appointment Records older than _____ days old. Locking an Appointment Record will successfully prevent any users from editing the record, with the exception of the case in which a user has sufficient Override privileges (System Administrators). The Appointment status and Notes fields still be available to edit, as in some cases such as Future appointments, this information will need to be added "after the fact". Appointment Records will lock after the number of days that you set in the "_____ days old" field.

Lock status as well
This preference, if activated, will lock Appointment Statuses as well, for the selected Group of users.

Lock notes as well
This preference, if activated, will lock Appointment Notes as well, for the selected Group of users.

Lock SAGE referrals older than days old
This preference, if activated, will lock SAGE Referrals for the selected Group of users after the number of days set in the blank field to the left of "*days old*".

Log In / Out

Click the *Log In/Out* Tab. The Log In/Out tab allows you to assign log in/out privileges to the members of this Group. Check the appropriate settings to set up the access levels for the members of this Group to sign students in and out of their visits and control what items this Group will view on the Log Listing.

Allow User to Search by Name on Log Listing Users
 This preference, if activated, will allow this Group of users to search by Name through the Log Student Window. Entering any text will prompt the System to perform a search for Students by name (minimum of 4 characters) and return with matching results.

Allow User to Search by Name on Log Listing KIOSKs
This preference, if activated, will allow this Group of users to search by Name through the Log Student Window on a KIOSK or Self Sign-in Station. Entering any text will prompt the System to perform a search for Students by name (minimum of 4 characters) and return with matching results

Allow User to Search by Barcode on Log Listing
This preference, if activated, will allow this Group of users to search by Barcode through the Log Student Window. Entering digits into the Log Student window will prompt the System to perform a

search for Students by Barcode number (minimum of 4 characters) and return with matching results. Barcode numbers are typically used as a secondary form of ID for KIOSKs.

Allow User to Create Student when Not Found
This preference, if activated, will allow this Group of users to create a new Student Profile when an ID number is not found (in the Log Student Window).

Allow User to Edit Students on Log Listing/Appts
This preference, if activated, will allow this Group of users to Edit a Student's Profile from either the Log Listing Window, or Appointment Entry Window. The modification of a Student's Profile could involve fields ranging from ID #, Birthday, Email Address, to College, GPA, or Ethnicity.

Allow User to Log Resources in and out
This preference, if activated, will allow this Group of users to Log resources in and out to students. This preference gives the selected Group of Users the ability to check these resources in and out to students who may need to borrow any resources available at your Subcenters.

Allow User to view logged out items on log listing
This preference, if activated, will allow this Group of users to view any resources checked out to students, specifically on the Log Listing. The Log Listing, while displaying the students currently logged in to your Subcenters, can through this preference also display any Resources that students may have checked out.

Allow User to view work visits on log listing
This preference, if activated, will allow this Group of users to view Work Visits on the Log Listing. Work Visits are typically used for Consultants to log payroll hours. In this case, these work visits do not appear for the average user on the Log Listing, so as to only display students' visits. This preference enables that privilege.

Show student photos on listing
This preference, if activated, will display student photos on the Log Listing for the selected Group.

Show Visit Center on log listing
This preference, if activated, will display the Center of Visit on the Log Listing for the selected Group.

Show Visit Reason on log listing
This preference, if activated, will display the Reason of Visits on the Log Listing for the selected Group.

Show Visit Subject on log listing
This preference, if activated, will display Subject of Visits on the Log Listing for the selected Group

Use Larger Font on Log Student Dialog (inactive)

Use Larger Font on Log Student Dialog (active)

Show SI Batch Entry Option
Activating this preference gives the selected Group the ability to enter Batch Visits through the
Create a **Batch Visit**   link on the Main Menu.

Show Visit Batch Entry Option
Activating this preference gives the selected Group the ability to enter Batch Visits within the Visits
Listing, accessible through the Visits menu option in the Search Glass.

Show Visit Scans Batch Import (customization required by Redrock Software)
Activating this preference gives the selected Group the ability to enter Batch Visits through the Batch
Scan Utility. Email support@go-redrock for more details.

Allow user to track attendance (only centers where log visit is enabled)
Activating this preference allows the selected Group the ability to track Attendance. Attendance can
be tracked much like SI Batch Visits in that attendance is marked by Section. Checkboxes populate for
each student enrolled in a particular section, and attendance can be marked simply by checking the
checkboxes. Attendance can also be recorded with a visit Center and a visit Reason.

Constrain center to: ( )
In regards to Attendance, selecting a Center for this preference will proceed to allow this Group to
ONLY mark attendance for the selected Center. When opening the Attendance Utility, the Center
dropdown will only contain the one Center determined through this preference.

Constrain reason to: ( )
In regards to Attendance, selecting a Reason for this preference will proceed to allow this Group to
ONLY mark attendance for the selected Reason. When opening the Attendance Utility, the Reason
dropdown will only contain the one Reason determined through this preference.

Constrain students visible: ( )
In regards to attendance, selecting a List for this preference will limit this Group to only being able to
mark attendance for students on the selected List. For more details on student Lists, see Chapter 14:
List Management.
No Reg (use list only)
If this preference is activated, student registrations or enrollment will not be taken into consideration
in regards to attendance. Only students on the selected list will be able to be marked for attendance.

Admin Modules

Next, click the *Admin/Modules* Tab. The Admin/Modules Tab allows you to assign administrative privileges to this Group as well as access to the Trac Modules: Whiteboard, SurveyTrac, and SAGE. Contact Redrock support for information on purchasing and activating modules (support@go-redrock.com).

Allow User to Manage Resources

This preference, if activated, will add access to the "Resources" Listing for the selected group of users. The Resources Listing simply lists all available resources at your Subcenters, and allows users to edit Resource information as well as check items in and out to students. The Resources Listing, if activated, will be accessible through the Search Glass in the Trac Navigation bar.

Allow User to Manage Room Scheduling

Allow User to View Modifications Logs

This preference, if activated, allows the selected Group of users to view the Modification Logs, or Log Mods for short. The Log Mods are basically records kept of ALL actions taken on your Trac System. The time any "action" was taken is recorded, as well as what pages were accessed, and who (username and IP address) performed the action. Log Mods are highly beneficial for troubleshooting purposes, but not completely necessary for every campus.

Override Appt Rules (Deletions, Creations, etc.)

This preference, if activated, allows the selected Group of users to Override Appt Rules. Appointment Rules may include the Max # of Appointments made per week, Max # of appointments made per center, Max # of missed appointments, or Minimum of 24 hours previous to booking an Appointment, etc…Any of these rules may be broken by the selected Group, if this preference is activated. Be cautious of which groups you assign this privilege to, as typically, these Appointment rules exist for a reason.

Override Lock Visits

This preference, if activated, allows the selected Group of users to Override Locked Visits. Visits may be locked through a Center Profile Preference *(see Chapter 11: Visits - Log Students In / Out TECH INFO – Preference: Autolock Visits older than (___) days)*, and activating this Preference will allow the selected Group to be able to edit Visit Data for Locked Records.

Allow User to Access Campus Custom Utilities

Allow User to Access System Prefs (must also be either a Center Admin or Sys Admin)

This preference, if activated, allows the selected Group of users to access the System Prefs Tab of the Utilities & Prefs menu. The System Prefs tab contains a variety of useful Administrative tools including

the Campus Name preference, Current Term, Login Instructions, Message Types, Semester End/Start Dates, Standard Student Fields, and Watch List Indicators setup preferences.

Allow User to Access Payroll Reports

This preference, if activated, allows the selected Group of users to have Access to the Payroll category of Reports. Payroll reports typically deal with Work Reasons, Consultant Hours, Pay Rate, or any reports that involve Funds.

Allow User to Edit Consultants from Schedule

This preference, if activated, allows the selected Group of users to Edit Consultants' Profiles from the Schedule. In the Personnel Listing on the left side, a "head and shoulder" icon will appear, allowing the selected Group of users to access a Consultant's profile by clicking on this icon.

Allow User to Access Consultant Document Postings

This preference, if activated, allows the selected Group of users to access Document Postings within a Consultant's Profile. The Document Postings can be located in the "Docs" Tab of a Consultant Profile.

Allow User to Create Online Sessions

This preference, if activated, gives the selected Group of Users access to the Management Functions of the add-on Whiteboard Module.
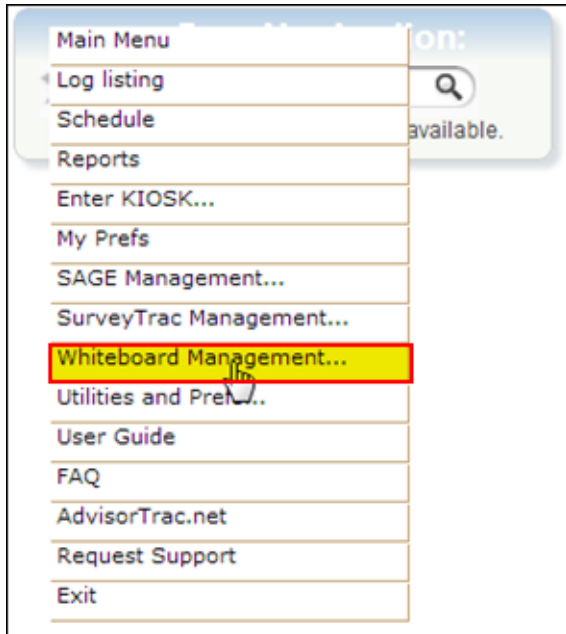
Allow Access to Surveys

This preference, if activated, gives the selected Group of Users access to the Management Functions of the add-on SurveyTrac Module. Access includes the ability to create surveys, edit surveys, or view existing surveys. The SurveyTrac Management Utility, if activated, can be located through the Trac Man icon in the Trac Navigation Bar.

Allow Access to SAGE Management functions

This preference, if activated, gives the selected Group of Users access to the Management Functions of the add-on SAGE module. Access includes the ability to create referrals, edit referrals, or view existing referrals through the Sage Management Utility. The Sage Management Utility, if activated, can be located through the Trac Man icon in the Trac Navigation Bar.

Allow User to view SAGE Referrals

This preference, if activated, allows the selected Group of Users to VIEW Sage Referrals specifically in a *Student's Profile*. The SAGE tab will appear in a Student's record, and a history of Referrals for the selected Student can be VIEWED directly from their Profile. If this preference is NOT active, the SAGE tab will not appear in a Student's Profile.

Restrict SAGE referrals to own

This preference, if activated, allows the selected Group of Users to only VIEW their OWN Sage Referrals specifically in a *Student's Profile*. For example, if Consultant Jon Halter (member of the Consultant Group) had filled out Referrals for some of his students that came in for tutoring, he would only be able to VIEW the Referrals that he himself created, in the respective Student's Profile.

Allow User to Create/Edit SAGE Referrals

This preference, if activated, allows the selected Group of Users to both CREATE and EDIT Sage Referrals, specifically in a *Student's Profile*. The SAGE tab will appear in a Student's record, and a Referral for the selected Student can be CREATED directly from their Profile. Any existing Referrals can also be EDITED directly from the selected Student's Profile.

Allow User to define custom fields

This preference, if activated, gives the selected Group of Users the ability to define Custom Fields when creating Referrals. Custom Fields or Questions can be created to gather additional feedback either from the Consultant, Student, Faculty Member, or perhaps even a Dean or Counselor.

Default Text to Student from Log Listing

Enter in this field the Default Text message that may be sent to Students directly from the Log Listing.

Default Text to Consultant from Log Listing

Enter in this field the Default Text message that may be sent to Consultants directly from the Log Listing.

Allow User to Generate Activation Code for Student

In order for students to receive Text Message notifications, they must first opt in to the program. To do this, an Activation code needs to be generated and sent from the student's phone. This preference allows a user to generate that Activation Code for the student, so that they can opt in to the Text Alert Program.

Restrictions

Now, click on the *Restrictions* Tab. The Restrictions tab allows you to restrict the members of this Group from performing some of their inherent privileges. Working in an opposite manner from the other settings, you check a setting in the Restrictions tab to remove a privilege.

Prevent access to Reports Chooser
This preference restricts the selected Group of Users from accessing the Report Chooser.

Prevent access to Group Preferences
This preference restricts the selected Group of Users from accessing the Group Access Preferences.

Prevent access to Group Restrictions Tab
This preference restricts the selected Group of Users from accessing the Group Access – Restrictions Tab.

Prevent access to Group Favorite Reports
This preference restricts the selected Group of Users from accessing the Favorites Category of Reports.

Prevent access to My Prefs to Personalize Main Menu
This preference restricts the selected Group of Users from accessing the My Prefs Menu.

Prevent User from Viewing Student IDs in Appointments and Log Listing1
This preference restricts the selected Group of Users from being able to view Student ID #s both in the Appointments Entries and Log Listing pages. Activating this preference will hide Student ID #s.

Prevent User from Viewing Grades in Progress Reports and Registrations
This preference restricts the selected Group of Users from being able to view students' Grades both in Progress Reports and Registrations.

Prevent User from Viewing Info Tabs in Student Entry
This preference restricts the selected Group of Users from viewing ANY info tab in a Student's Profile or Record.

Prevent User from Viewing Info Tabs: Basic Info
This preference restricts the selected Group of Users from viewing the Basic Info Tab of the Student's Profile. The Basic Tab contains basic contact info such as Name, Email, and Birthdate, and demographic info such as Gender, Ethnicity, and Major.

Prevent User from Viewing Info Tabs: Custom Campus
This preference restricts the selected Group of Users from viewing the Custom Campus Tab of the Student's Profile. The Custom Campus Tab contains the 9 available Custom Fields which may track any information you deem relevant.

Prevent User from Viewing Info Tabs: Center Info
This preference restricts the selected Group of Users from viewing the Center Info Tab of the Student's Profile. The Center Info Tab contains the Center Status information of a student: how many appointments they've missed, and their resulting status (i.e. Banned, Probation)

Prevent User from Viewing Info Tabs: Lists
This preference restricts the selected Group of Users from viewing the Lists Tab of the Student's Profile. The Lists Tab will display any Lists the student may be a part of.

Prevent User from Viewing Info Tabs: Schedule
This preference restricts the selected Group of Users from viewing the Schedule Tab of the Student's Profile. The Schedule Tab contains the Student's Class Schedule.

Prevent User from booking appointment on schedule

This preference restricts the selected Group of Users from booking Appointments through your Trac Schedule. Activating this preference will remove the blue dropdown arrow next to appointments on the Schedule, but will not remove the ability to Book appointments through the Search for Availabilities.

Prevent User/Consultant from Editing Specialties
This preference restricts the selected Group of Users from editing Consultant Specialties, including both Subject Specialties and Reason Specialties. Activating this preference will take away the ability to click on the checkboxes next to Sections and Reasons within the Subject Specialties and Reason Specialties Tab, but won't remove the Tabs altogether.

Prevent User/Consultant from Editing Consultant Bio
This preference restricts the selected Group of Users from being able to edit any Consultant's Bio. This includes the entire Consultant's Profile. Activating this preference will remove the SAVE button from a Consultant's Profile.

Prevent User from Terminating Visits From Log Listing
This preference removes from the selected Group of Users the ability to Terminate visits from the Log Listing. Activating this preference will remove the Red Circular Terminate icon.

Prevent User from Searching 'Work' Visits
This preference prevents the selected Group of Users from being able to search for "Work" Visits, or Visits made by Consultants with student accounts to track payroll hours.

Prevent User from Sending Messages to SELECTED Students
This preference, if activated, restricts the user from sending messages to multiple students, or students found via search. The "Send HTML Note" function that is located in the List Options within Student Listings will not be available if this restriction is activated.

Prevent User from Creating Messages for Students
This preference restricts the selected Group of Users from using the "Create an HTML note" function to send emails to Students. This preference will restrict access to ALL messages, including email and Text.

Prevent User from Changing Appointment Data except Appointment Status
This preference restricts the selected Group of Users from changing ANY appointment data, with the exception of the Appointment Status (Attended, Missed, Cancelled). Activating this preference will deactivate ALL dropdown menus, text fields, or

Prevent User from Cancel/Deleting Appointment (or change status to cancel/delete)
This preference restricts the selected Group of Users from Cancelling or Deleting Appointments. Activating this preference disables key fields in the Appointment Entry Window.

Prevent User from Moving Appointment
This preference restricts the selected Group of Users from Moving Appointments by removing the "Move To" function from the Appointments Entry window.

Restrictions to User Modification

Prevent User from Creating Users
This preference restricts the selected Group of Users from being able to Create User Profiles through the Group Access Tab.
Prevent User from Editing Users

This preference restricts the selected Group of Users from being able to Edit User Profiles through the Group Access Tab.

Prevent User from Deleting Users
This preference restricts the selected Group of Users from being able to Delete User Profiles through the Group Access Tab.

Chapter 5: Sections

The importing of Section data or subject data is essential for a variety of functions within your Trac system. Importing Course enrollment information, registration records, and even grades or progress reports can potentially add meaning to data that is being collected.

Course enrollment can also be highly beneficial in regards to Advising sessions, Tutoring consultations, the Log in / Log out process, Scheduling process, and Reporting capabilities. Course enrollment data can make your login process more efficient by automatically populating students' current enrollment information as they are logging in. When a student is searching for an Availability to book an Appointment, his/her section data can automatically load into the subject field, streamlining the setup and configuration processes, and ultimately making searches more efficient and timely. Consultants can host sessions based upon subject or section, such as Group workshops or Supplemental Instruction meetings, and conversely, students can find sessions based upon subject. Reports can be generated based on section data. Whether a report aims to organize visits by a specific course, or compare grades of students who have received tutoring to those who have not, adding section data to your Trac system is highly recommended.

Section/Subject data can either be imported automatically or entered on a manual basis. To get a better idea of the Automated Import process, let's first add a section manually.

Creating a Section Record

To add a section, we can navigate to one of two areas: Center Profile – Sections Tab or the Sections listing. For this example, we will go to the Sections Listing. Hover over the Search Glass on the right hand side of your Trac Navigation (top left corner on Main Menu) and select Sections.
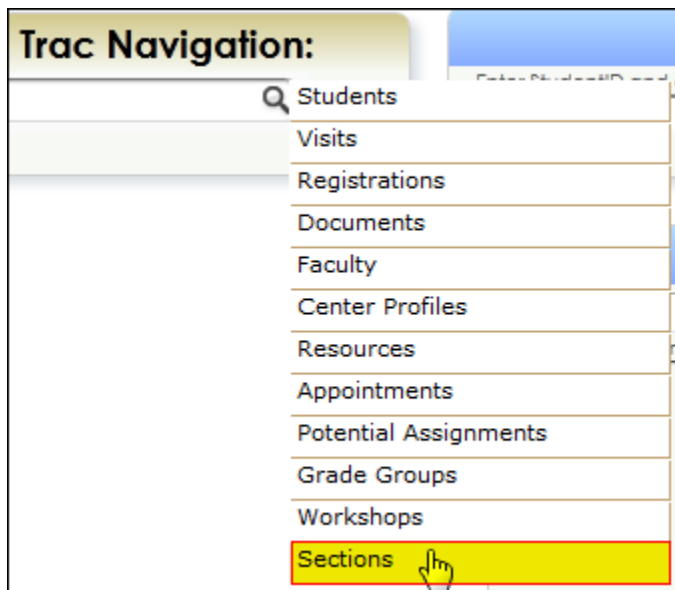
Once we've navigated to the Sections listing, click on *List Options > New Section* to add a new section.
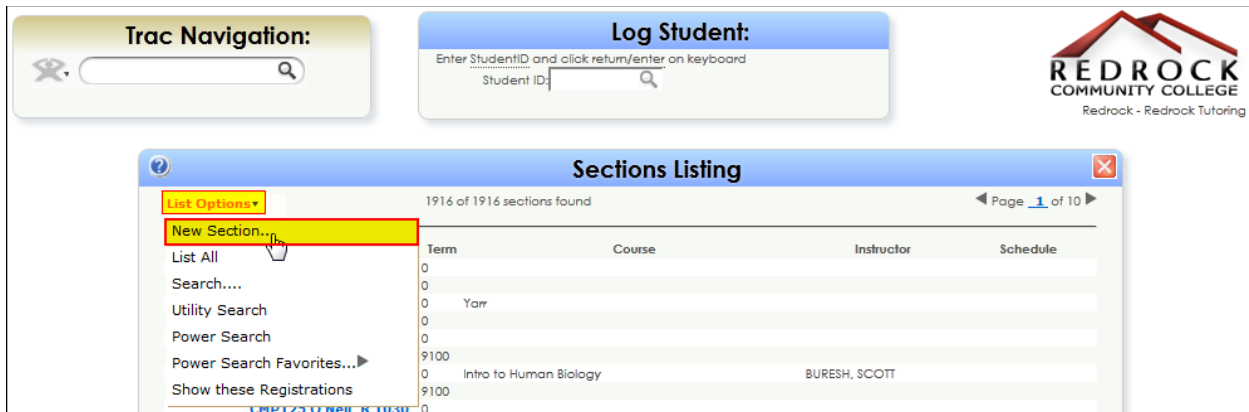
The first tab selected will be the *Course Info* tab. Here we can enter some basic information about the course we would like to add.
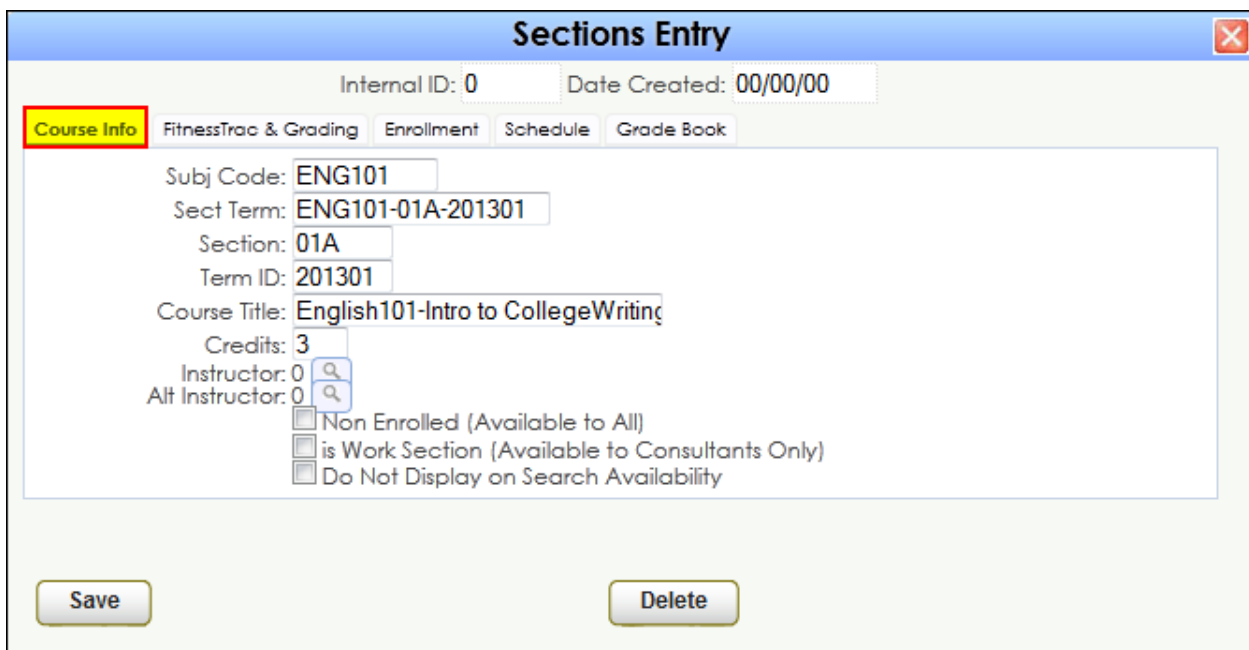
Enter some basic information about your section. At minimum, your section needs to include a Subject Code and a Section Term. We also recommend that you include a Section Code, Term ID, and Course Title when you create the section. You may also assign the course Instructor.

The Subject Code is typically created from a department designation (i.e. MATH) and a course number (i.e. 200). This should be a recognizable code to the students so they can identify the courses in which they are enrolled.

The Section is an alphanumeric code that identifies the specific section of a course (i.e. 1234).

The Term ID is a numeric code for the year and semester for this section (i.e. 201310). If you are creating a section that would be available regardless of school term, then you will leave the Term ID as zero.

The Section Term is typically created by combining the Subject Code, Section, and Term ID.

Generic Sections

After both student and course enrollment data are entered, it is in some situations beneficial to create what we call a "generic" section. For example, when our student Sam Smith logs in to a center and is selecting a Subject for his visit, a list of courses that Sam is currently enrolled in (typically 4 - 6 courses) can be displayed in the Subject drop down menu, rather than a complete list of all available courses. However, if Sam is looking for general Writing help in preparation for a Graduate School Essay Application, this need cannot be expressed in his current list of courses. In this situation, we have the option of adding a Generic Section, perhaps entitled "Graduate Prep", that would be available to ALL students (enrollment NOT required), so that Sam can select a more accurate subject for his visit. You might also create sections that are for generic tutoring subjects that you would like to offer as options to all students, such as Other,

Personal, Study Skills, Non-Course Related, etc.

To add a Generic Section, we can navigate to one of two areas: Center Profile – Sections Tab or the Sections listing. For this example, we will go to the Center Profile - Sections Tab. Hover over the Search Glass on the right hand side of your Trac Navigation (top left corner on Main Menu) and select Center Profiles. Select your Center Profile and Navigate to the Sections Tab. Then click on the blue "New" button to the right of the "term" field.
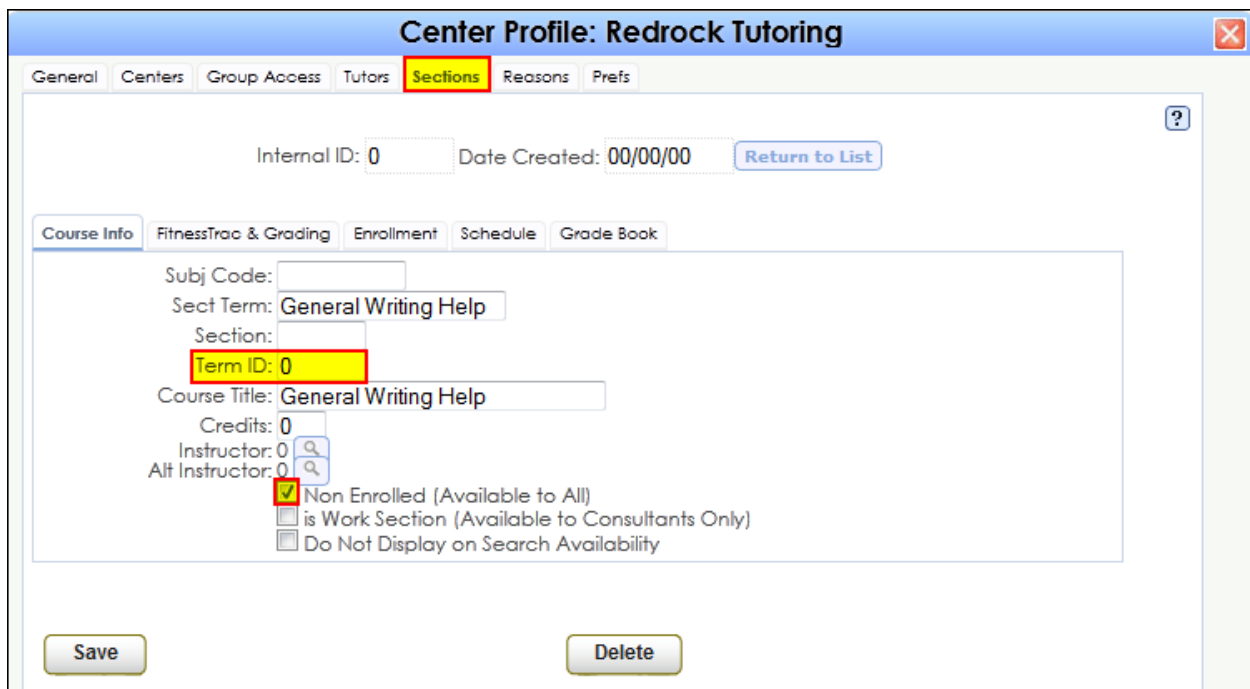
Here we can enter information pertinent to the course in the exact same manner as detailed in the manual process above (*See Chapter 5: Sections - Creating a Section Record*). There are two exceptions

within this process that we must adjust in creating a generic section. One involves the *"Non Enrolled (Available to All)"* preference, and the other involves a term code of 0.

The *"Non Enrolled (Available to All)"* preference, if activated, will make this section Available to ALL students regardless of a student's enrollment in the course. This is very similar to activating a section for ALL subcenters, in that, ANY student who logs in to ANY Subcenter will be able to select this course for their visit. Check the box to the left of *"Non Enrolled (Available to All)"* to make this section a Generic section.

Setting a term code of 0 is also recommended so that as Semester Term codes change over time, any generic sections with term codes of 0 remain constant. Assigning a term code of 0 to your generic sections also makes it easier to differentiate these courses from actual courses. If this is desirable, set the Term ID to "0". Click *"Save"* to save the section record.

Generic Sections are useful in many situations. Often, campuses need a system to facilitate Prospective students, or students who have not yet enrolled at their campus but are in the process of orientation, etc…With Generic sections, prospective students are able to, for example, hold an Advising session and record the data associated with the visit, without having any course enrollment information.

Importing Course Enrollment Data

Students' course information may also be Imported into your Trac system from your Student Information System. Whether your campus uses Banner, Datatel, Peoplesoft, or even a homegrown system, we can extract data from your Student Information System and Import the appropriate data into your Trac system. This process can be run on a manual or automated basis.

First we need to decide which specific fields need to be extracted from your SIS. Typical fields used for example, are Course ID, section ID, Course Title, Term ID, Instructor ID, Instructor Name, and Grade. We can use a blank Section Entry as reference:

Once your Administrators have decided which fields would be beneficial or essential, we will need to work with your Campus' IT department to facilitate the data Extract from your SIS. Create a sample data file and send it to Redrock Software Corporation. Acceptable data file formats are tab delimited (ASCII), comma delimited (csv), or fixed character position (ASCII). An import map is then created based on the sample file.

After the fields are chosen, the data file is created, and the import map is written, your Trac System can run the import process automatically. First, the data file should be updated and saved to the same location on a daily basis. The campus IT personnel may write a script to automate this process. At this point we will also need to set a time within your Trac system for the Automated Import Event to run. The import will then update each day automatically, providing the most current information from the campus SIS database.

Here is a table detailing Course/Section fields.

Course Fields

Name	Type	Required	Description
Student ID	A20	Yes	The unique numeric ID of the student. In some cases the ID is the secondary alphanumeric ID - please indicate to us which ID will be utilized.
Course	A40	Yes	The course in which the student is enrolled
Section	A40	Yes	The section in which the student is enrolled
Title	A80	Yes	The name of the course in which the student is enrolled
TermID	#	Yes	The term code for the semester that the student is enrolled in: 032 might be the year 2003 Spring, and 034 might be the year 2004 Summer.
Instructor ID	??		If utilized, coordinate the use with Redrock Software.
Instructor Name	A60		The fullname of the instructor
Instructor First	A40		The instructor's first name.
Instructor Last	A40		The instructor's last name.
Instructor Email	A80		The instructor's Emaill address.
Instructor Phone	A20		The instructor's phone.
Instructor Sal	A8		The Salutation or Degree for the instructor (Phd, etc.)
Grade	A20		The Grade received for this course.
Value	#		The Numeric grade value
Date	D		Date grade/report issued.
Type	A40		The report type (midterm, final, etc.) In some cases it is simply a flag used by the system to indicate the disposition of the course (REGISTERED, DROPPED, WITHDRAWN).

Activating Sections

nce your section/course information has been entered either manually or via the import process, we will need to activate Sections for your Subcenters, or in other words, we will need to indicate which courses will be available at which Subcenters. For this next example, we will be activating courses for our Writing Center. First, let's navigate to our *Center Profile – Sections Tab*. Here we will click on the *SubCenter Options* dropdown menu, and select the *Writing Center*.
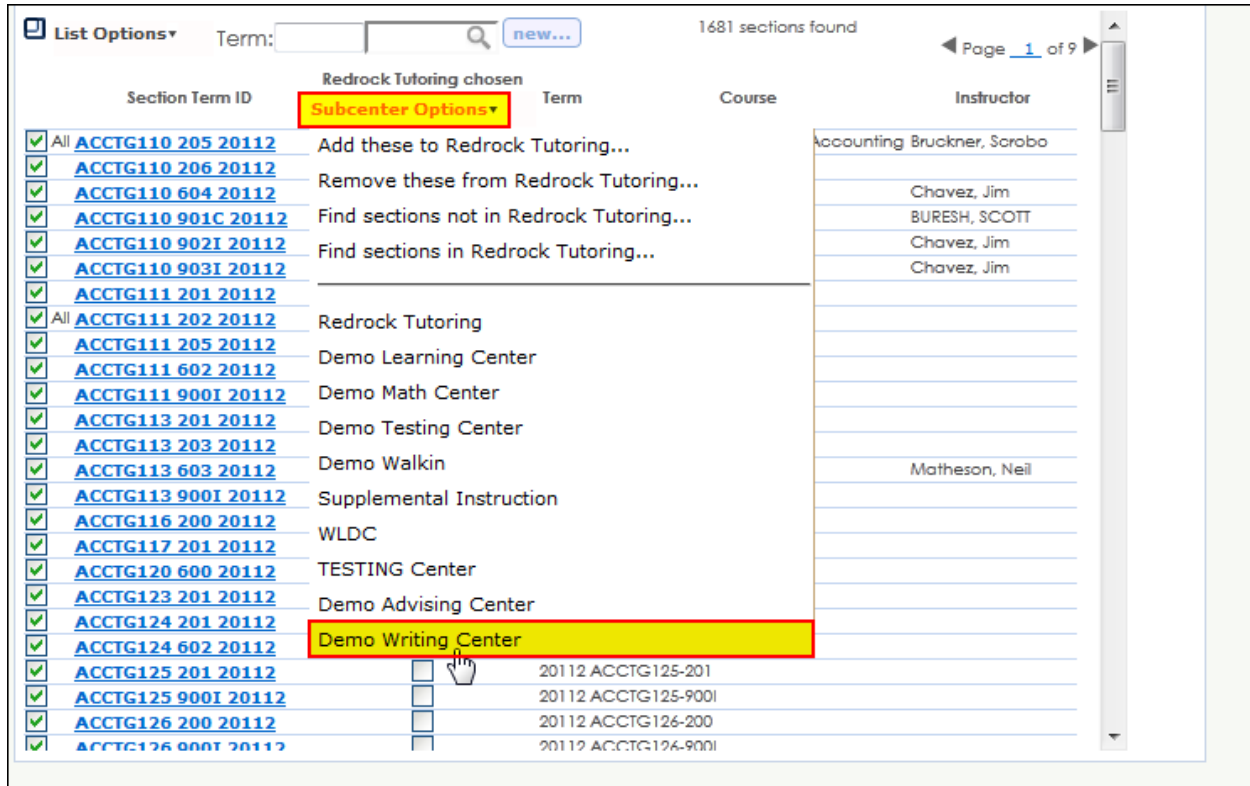
The system will then notify the User that the Writing Center has been chosen.
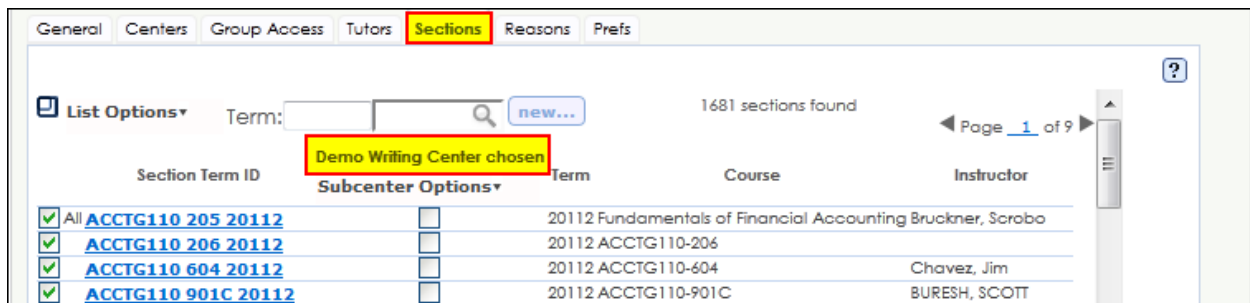
Now that we've selected our Subcenter, we need to perform a search to find the courses we want to activate for the Subcenter in selection. For this example, we will be looking for English courses that we want to activate for our Writing Center. Type "ENG@" in the Search Field [🔍] to the left of

the New button. The wildcard "@" symbol will modify the search to include any courses that BEGIN with "ENG", i.e. ENG101, ENG 202 etc…

Center Profile: Redrock Tutoring

General   Centers   Group Access   Tutors   **Sections**   Reasons   Prefs

List Options▾   Term: [ENG@ 🔍]   [new...]   143 sections found

Demo Writing Center chosen

Section Term ID	Subcenter Options▾	Term	Course	Instructor
☑ ENG101 01 20112	☐	20112	First Year Composition	Moore, Kenneth
☑ ENG151 200 20112	☐	20112	ENG151-200	
☑ ENG151 205 20112	☐	20112	ENG151-205	
☑ ENG151 206 20112	☐	20112	ENG151-206	
☑ ENG151 207 20112	☐	20112	ENG151-207	
☑ ENG151 208 20112	☐	20112	ENG151-208	
☑ ENG151 209 20112	☐	20112	ENG151-209	
☑ ENG151 210 20112	☐	20112	ENG151-210	
☑ ENG151 211 20112	☐	20112	ENG151-211	
☑ ENG151 212 20112	☐	20112	ENG151-212	
☑ ENG151 215 20112	☐	20112	ENG151-215	
☑ ENG151 216 20112	☐	20112	ENG151-216	
☑ ENG151 350 20112	☐	20112	ENG151-350	
☑ ENG151 603 20112	☐	20112	ENG151-603	
☑ ENG151 604 20112	☐	20112	ENG151-604	
☑ ENG151 606 20112	☐	20112	ENG151-606	
☑ ENG151 607 20112	☐	20112	ENG151-607	
☑ ENG152 200 20112	☐	20112	ENG152-200	
☑ ENG152 206 20112	☐	20112	ENG152-206	
☑ ENG152 207 20112	☐	20112	ENG152-207	
☑ ENG152 208 20112	☐	20112	ENG152-208	
☑ ENG152 210 20112	☐	20112	ENG152-210	
☑ ENG152 211 20112	☐	20112	ENG152-211	
☑ ENG152 212 20112	☐	20112	ENG152-212	
☑ ENG152 213 20112	☐	20112	ENG152-213	

The system then locates 143 sections that begin with "ENG" out of 1681 total sections. In order to activate these courses for the Writing Center, we have the option of checking each Center checkbox (underneath the Subcenter Options column) individually.
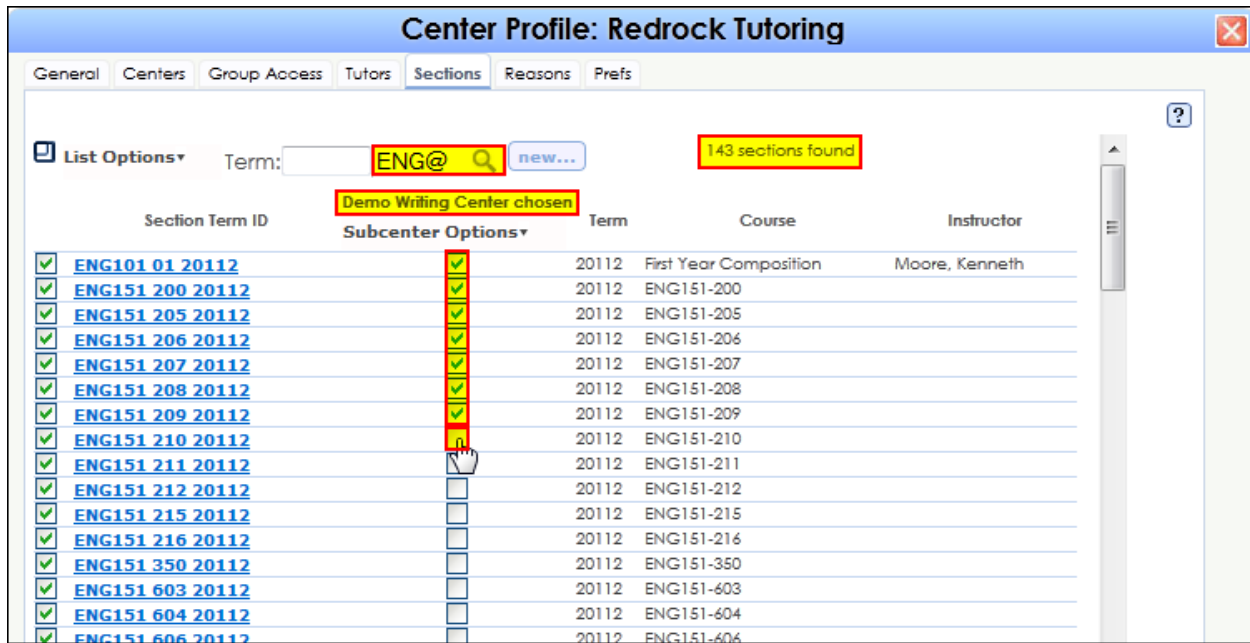
On the other hand, if we would like to activate ALL courses found in our Search, we can click *Subcenter options > Add these to Writing Center*. This will proceed to add ALL courses located through our Search (143 sections found) to the Subcenter in selection – the Writing Center.
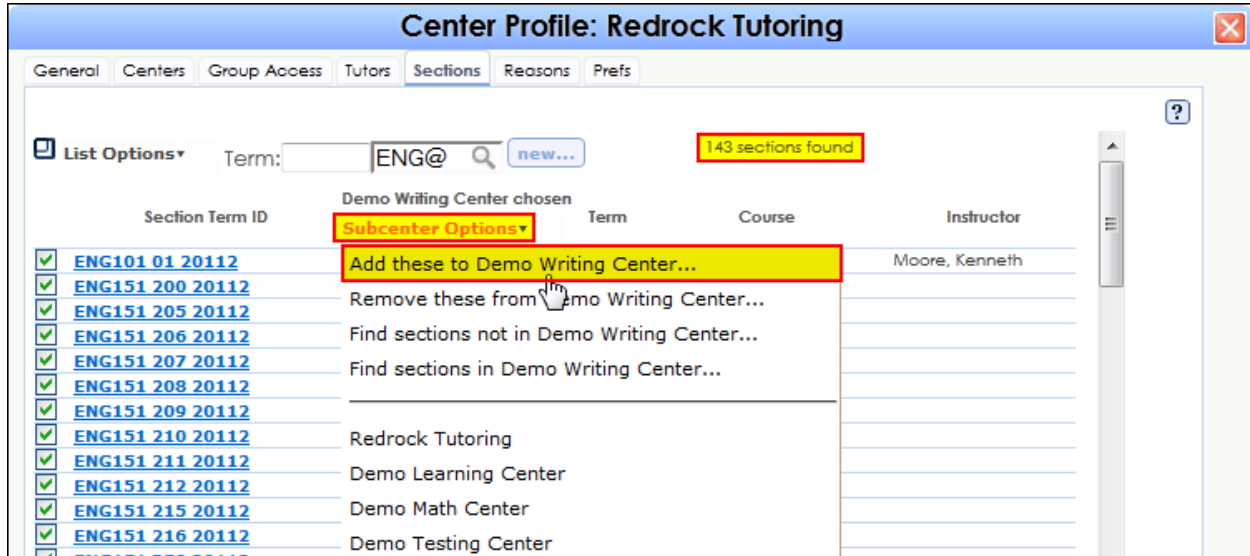
If, for example, let's say for our Testing Center we would like to activate ALL courses EXCEPT English courses. In this situation, we would follow the same procedure. We would first select the Testing Center from Subcenter Options. Make sure that the total numbers of sections are listed (for this example, 1681 sections found). If this is not the case, you may need to click *List Options > List All*, and repeat your Subcenter selection through *Subcenter Options*.

The system will then notify us of our Subcenter Selection. Now, because we want to activate ALL courses (except English), click on *Subcenter Options* and select *Add These to Testing Center*. This will add ALL courses to our Testing Center.

Now, since we've activated ALL courses, we need to remove ALL English courses from our Subcenter Assignment (Testing Center). We at this point repeat the exact same search for "ENG@" courses and find the 143 English sections found in our previous example.
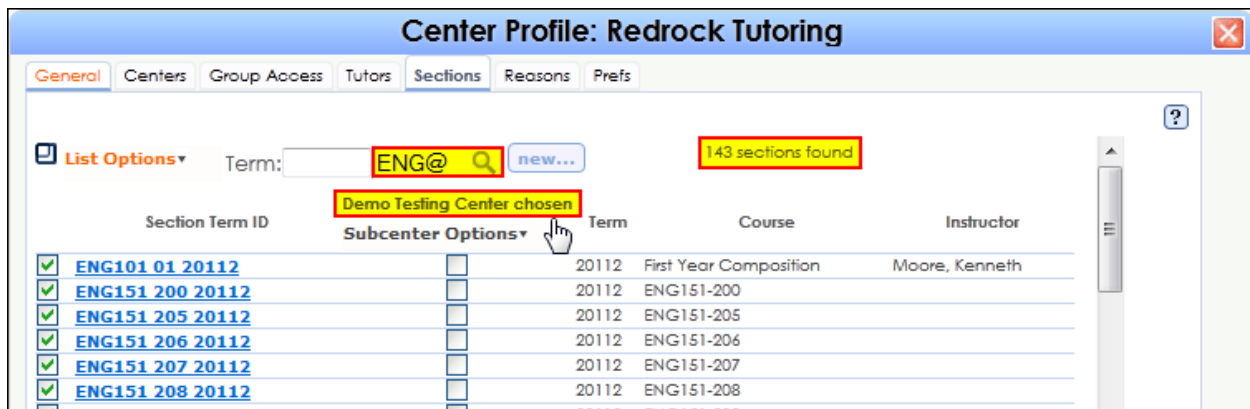
To do this, click on Subcenter Options and select *"Remove these from Writing Center"*.
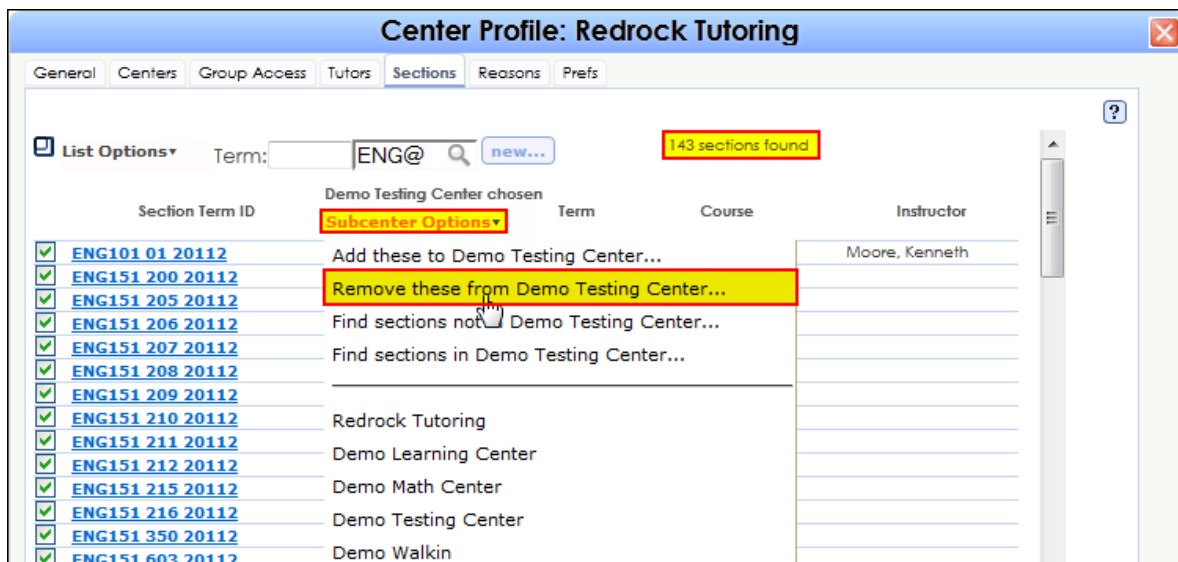
Doing this will proceed to remove the 143 English sections we found in our search from the Testing Center. Now, ALL courses will be active for the Testing Center, except any course that begins with "ENG".

Changing Semesters

At the end of the semester, there are a few steps to transition to the new semester. Your import files include course registrations for specific terms. Your Trac system identifies the active term to specify which course registrations are active. The tutors' specialties are related to sections from the previous term and need to be converted to sections for the new term.

Because import files contain student registrations specific to a term, the timing between changing your Term Code and importing your registrations is crucial. If you import the next semester's data before you change the term code, then all of the previous semester's courses will be marked as Inactive AND all of the next semester's courses will be marked Inactive. Even if your previous term is not over and you have not changed the term code in the preferences, the courses are now Inactive and students will not be able to visit for the courses. Even if your next term has started, the courses will be marked Inactive if you have not changed the term code in the preferences. Make sure to change your Term code FIRST, and then run your Import.

From the Trac Navigation, click on the Tracman icon and select "Utilities and Prefs..."

When the "*Batch Utilities*" window opens, select the "*System Prefs*" tab. Under the Campus Information click on the "*CurrentTerm*" link.

Enter in your numeric term code in the data field provided then click SAVE.

After Changing the Term code you then will need to Update your import files (typically students.csv and courses.csv) for the new semester. These files are located in the Import folder of your root Trac system folder.

Once the import file is up to date you will run the import file from the Batch Utilities Screen. When on the Batch Utilities screen click the **"Custom Utility"** tab and make sure **"Standard"** is selected. Select **"Import Student Data"** and then click **"Execute"**

To check on the status of an import from the same "Custom Utilities" tab click "View Import Status" and then click Execute.
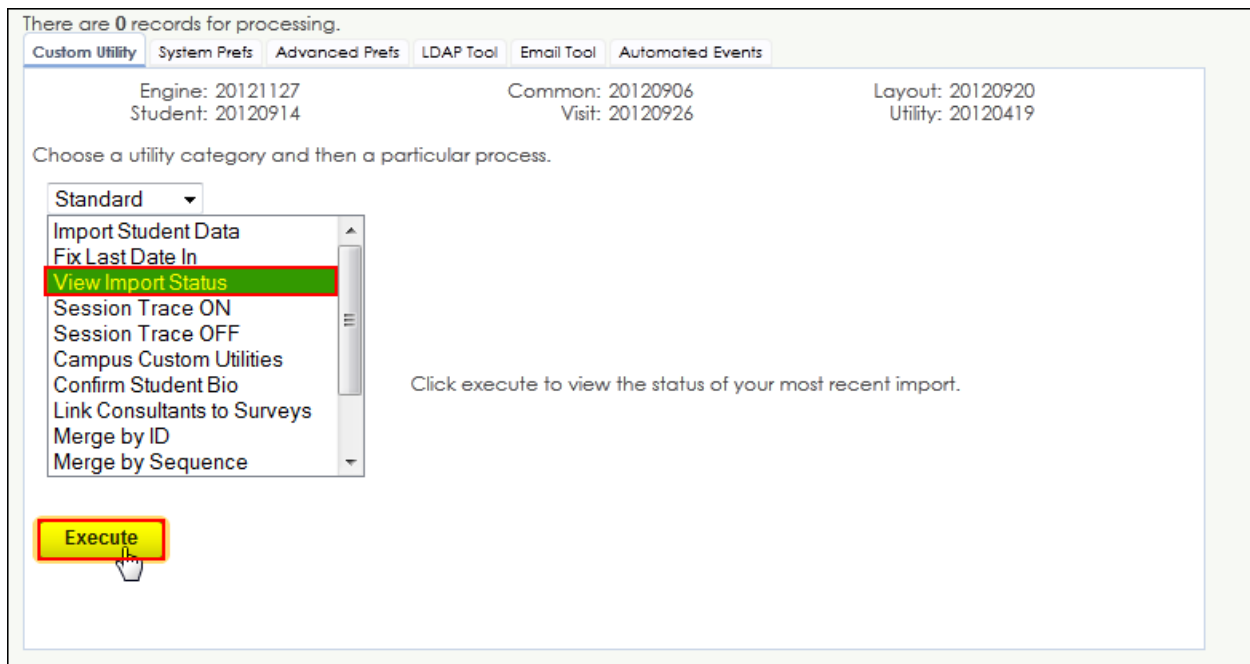
This will display detailed information on your most recent import including...

- Date and Time

- What import files were used

- How many students were imported and created

- How many registrations/Sections and subjects were imported.
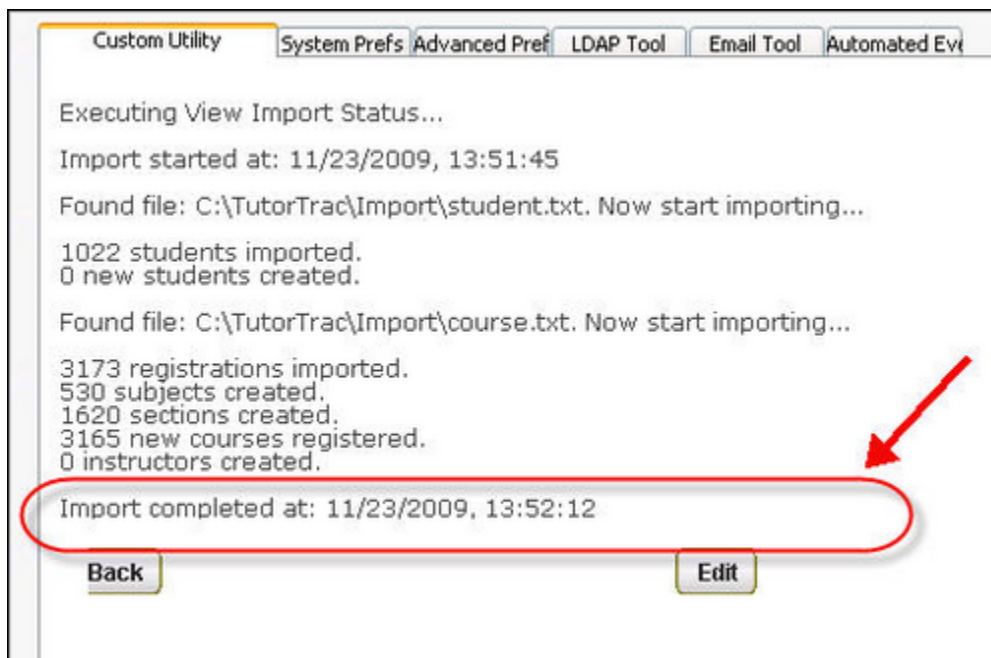
Activating Sections for a New Term

When the import is complete, the next step is to activate the new courses for the updated term.

From the Trac Navigation to the magnify glass and click Center Profiles. In the Center Profiles go to the Sections tab and in the Section Listing, type the new Term code in the "Term" field. The Section Listing will now display all sections in your new term.

The sections must first be activated globally for the Profile in order to be an available option for visits and appointments. The checkbox on the left column determines whether the course is active or inactive for ALL Subcenters.

Click the checkbox in the left-hand column to activate the sections or uncheck the checkbox to deactivate the sections individually. To activate/deactivate all at once click the **List Options** and select **Activate/Deactivate** these.

After the sections are activated for the Profile, choose a center from the **Subcenter Options** menu.
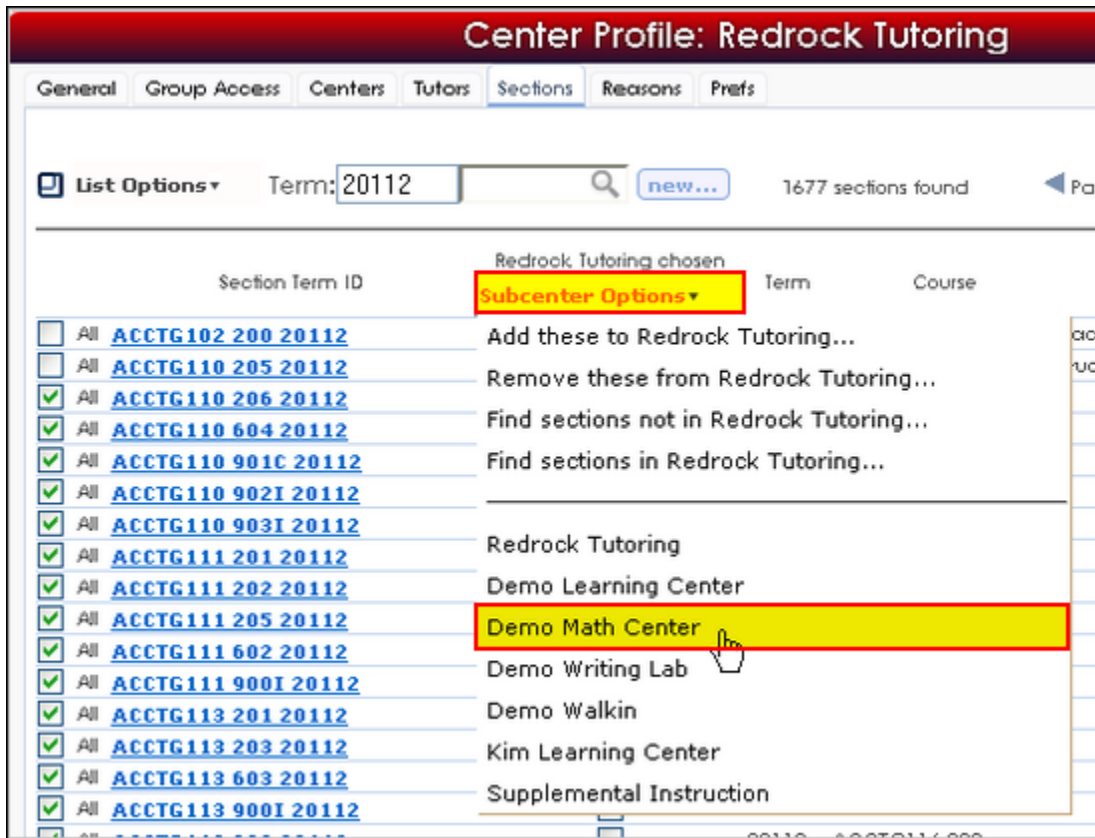
Click the checkbox in the middle of the listing to activate the section for this center, or to activate all at once click the **Subcenter Options** and select **Add these to (Your Center)**.
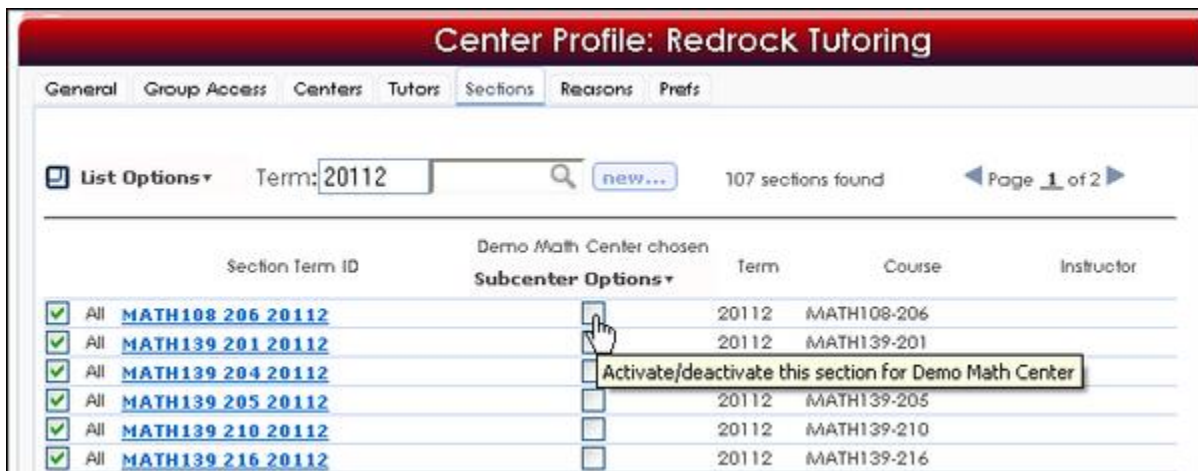
The section is now an option for visits and appointments in this center.

Consultant Section Specialties

Consultant specialties are related to sections from the previous term, the specialties need to be converted for the new term. This process is dependent upon the previous processes.

To Manually activate the Consultant Specialties

Click the *Consultants* tab. Click Load to display all of the consultant records for this Profile.
In the Consultants profile, click the Section Specialties tab and assign the sections with the new term for the consultant by checking the checkbox for the appropriate sections. You can locate courses efficiently by using the Search Field [⠀⠀⠀⠀⠀🔍] as well as the wildcard "@" symbol (See Chapter 19: Tips & Hints – Searches).

Click *Save Consultant* to save the additional settings for this consultant record.
Click *Return to List* when you have completed entering a consultant to return to the list of consultant records for this Profile.

Copy Specialties Utility

The Copy Specialties Utility allows you to copy the same sections from one term to another.

The Copy Specialties option is found in the Utilities and Preferences. Select the Custom Utility Tab and click on Copy Specialties.

The Copy Specialties Utility allows you to specify some options. Specify which term the specialties are copied from and to which term they are copied. Choose whether the previous tutor specialties are removed or are left as tutor specialties. Select if the Copy Specialties Utility will be run for all tutors from all centers, for all tutors from a specific center, or for just a specific tutor. Click **Execute** to run the Utility.

Section Groups

Section Groups can be created for Consultants to conveniently classify a group of section specialties. If a Consultant, for example, specializes in all subjects available at a subcenter, but wants to create an availability or session strictly for Math sections, we can create a section Group for this Consultant to more conveniently create the correct availability.

Creating a Section Group

To create a section group, first navigate to the *Sections* tab of your Center Profile. Hover over the search glass on the right side of the Trac Navigation bar (top left corner of main menu) and select *Center Profiles*. Select the appropriate Center Profile and navigate to the *Sections* Tab.

From your Center Profile: sections tab, click List Options and choose to *Switch to Section Groups*.

Now click List Options and select *New Section Group.*

Enter the name of your new Section Group and click *OK*.
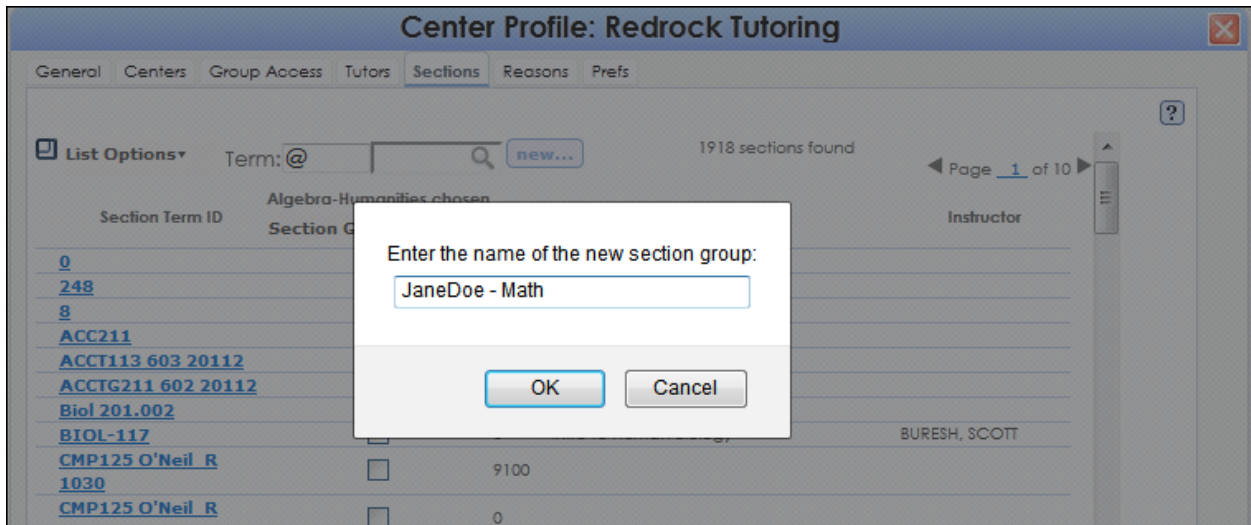
Creating a new section group will automatically select your Section group by default. To select your Section group, click *Section Group Options* and choose your Section Group.
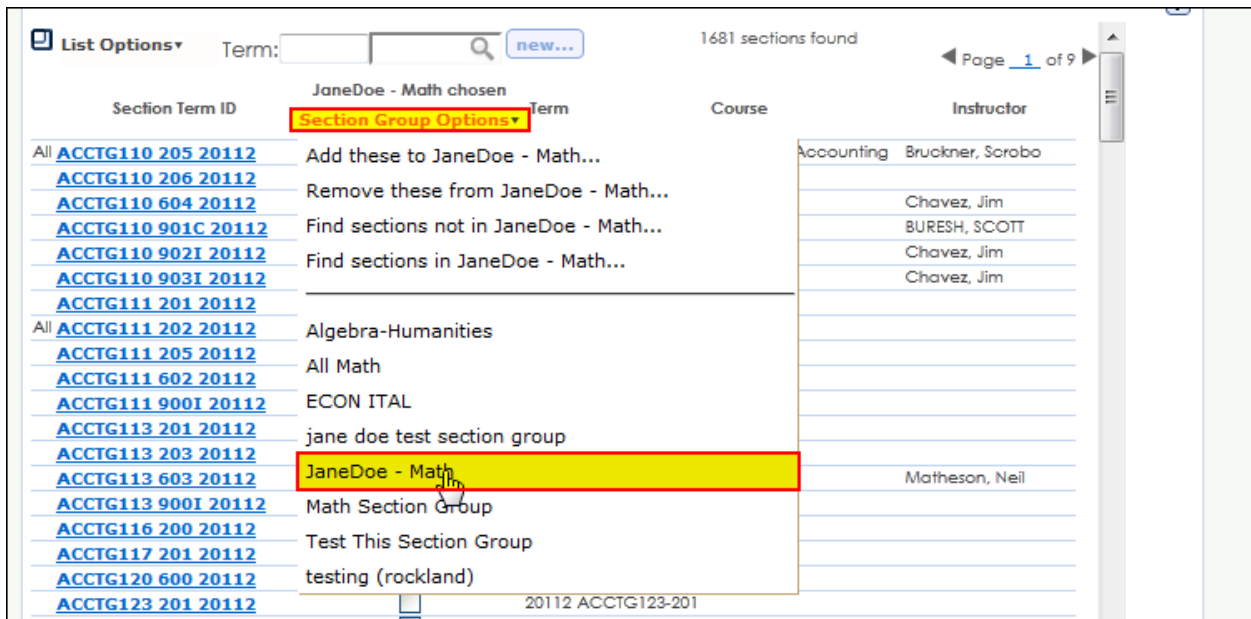
The system will then notify you of your selection just above the *Section Group Options* menu.
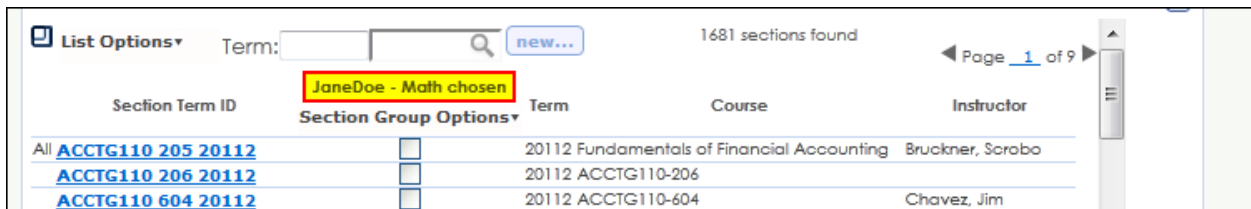
At this point, we need to assign or add sections to our newly created Section Group. You can manually browse through the list of sections and activate sections by clicking on the center checkbox, or we can perform a search to expedite the process. For this example, we will search for all Math sections. Enter the term "MAT@" (the wildcard @ symbol will include all sections beginning with the term MAT – (See Chapter 19: Tips and Hints - Search for more detail) into the Search field [ ] and hit Enter or Return to perform the search.
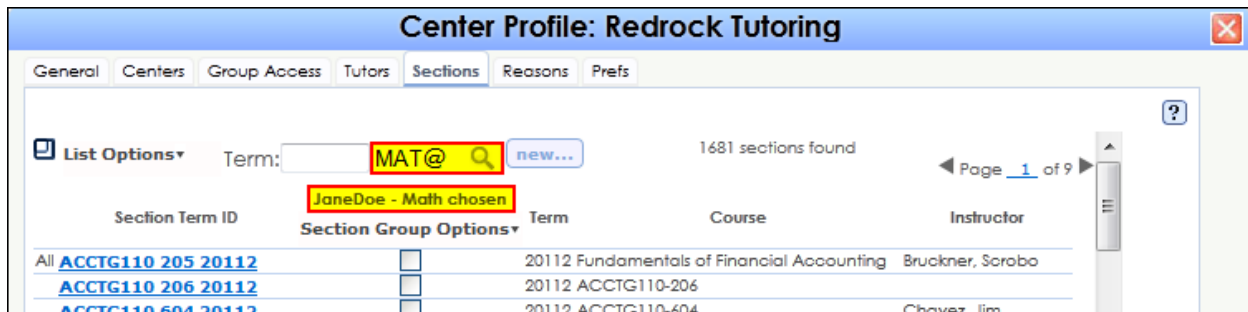
After the search has been performed, a list of matching courses displays underneath. Click the checkbox to the right of each section to add the corresponding course to your Section Group. To add ALL 108 Math sections found (of 1681 total sections), click Section Group Options > *Add these to JaneDoe – Math*.
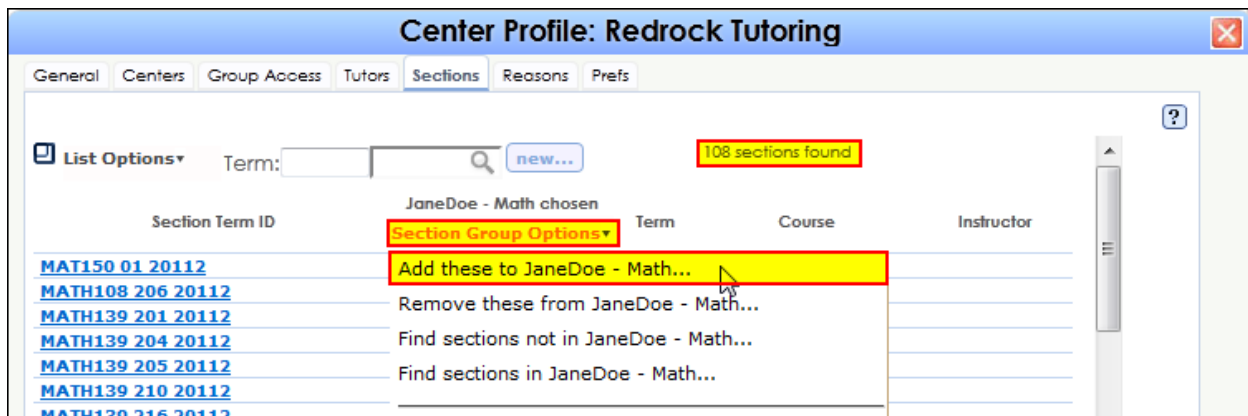
After clicking *Add these to JaneDoe – Math,* the 108 sections found in our search are now added to the JaneDoe – Math Section Group.

Now if Jane wants to create an Availability specifically for Math, she can do so simply by selecting her Section Group in the Subject field.

Now, only students enrolled in Math courses will be able to book appointments for this availability.

Chapter 6: Reasons

Students can be required to select a reason for their visit to the center. You can create any reason you need, and use those reasons to view why students are visiting your center.

The Center Profile Reasons allow you to set up which reasons will be available for appointments and visits. Reasons can be assigned to individual subcenters in your profile.

Creating a Reason

Reasons are contained within your **Center Profiles**, so hover over the search glass icon on the right hand side of the Trac Navigation bar (top left corner of Main Menu) and choose **Center Profiles**. Click on your Center Profile.
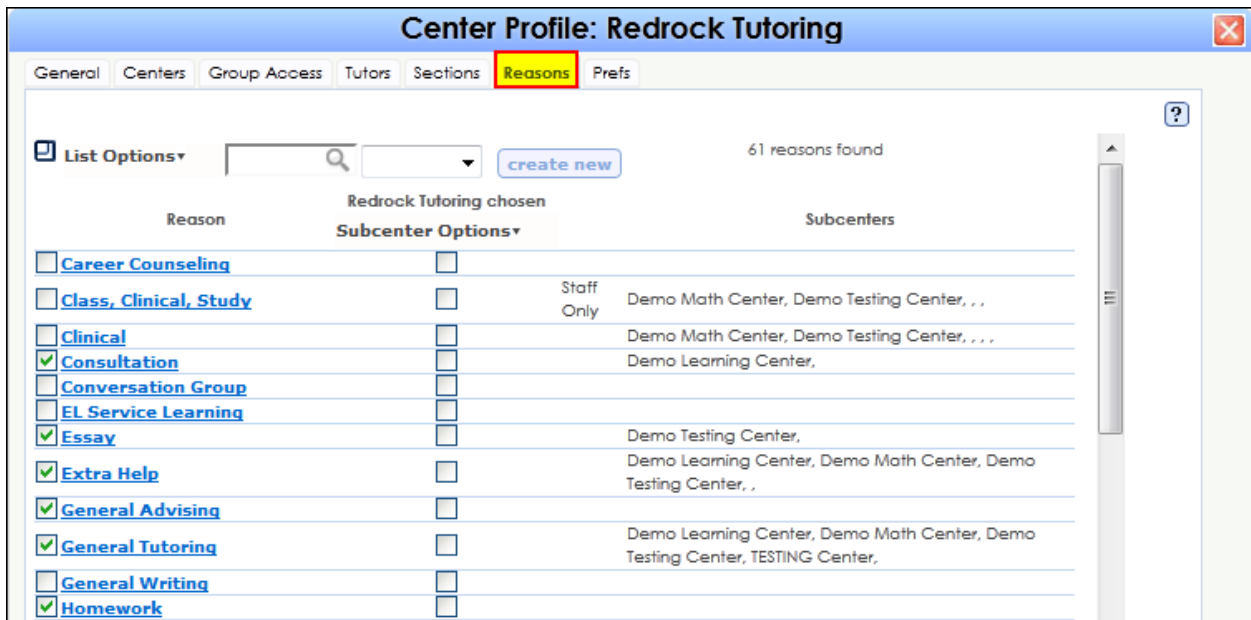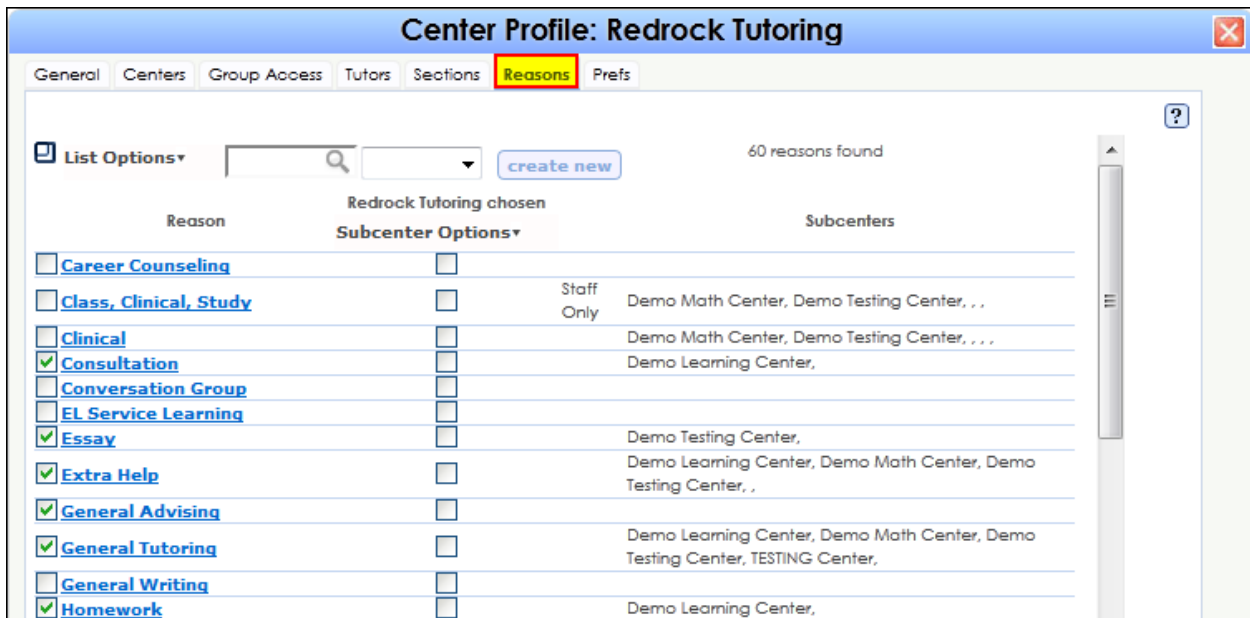
Navigate to the **Reasons** tab and click on the **Create New** create new button.
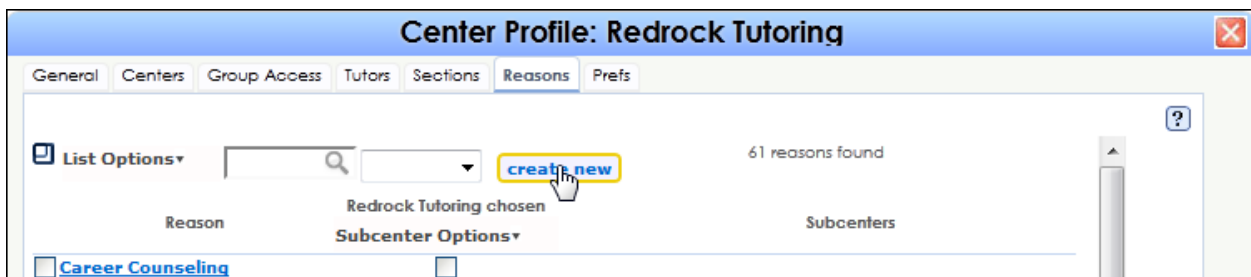
In the pop up window that appears, enter a reason and click **Add** *to create a Reason.*
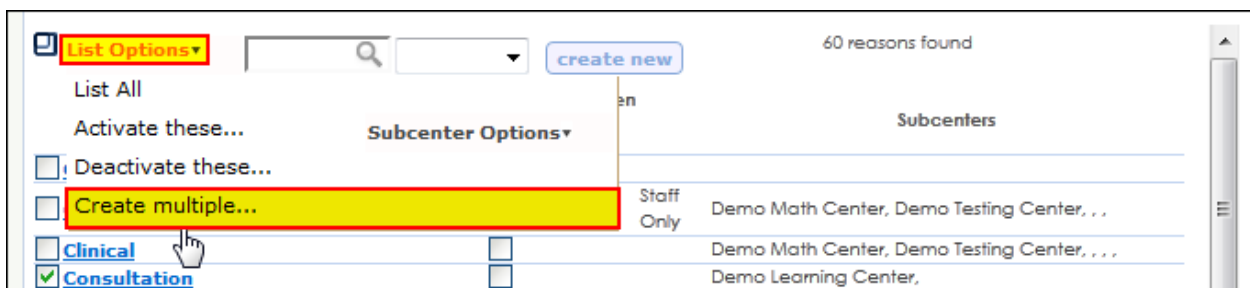
Your newly created Reason will then display in a List within your **Reasons** Tab.

You can also create Multiple Reasons at once by selecting **List Options > Create multiple…**

In the **Enter Reasons** window that appears, you can enter multiple reasons at once by separating each reason with an Enter or Return character. Click **Add** to save your reasons.
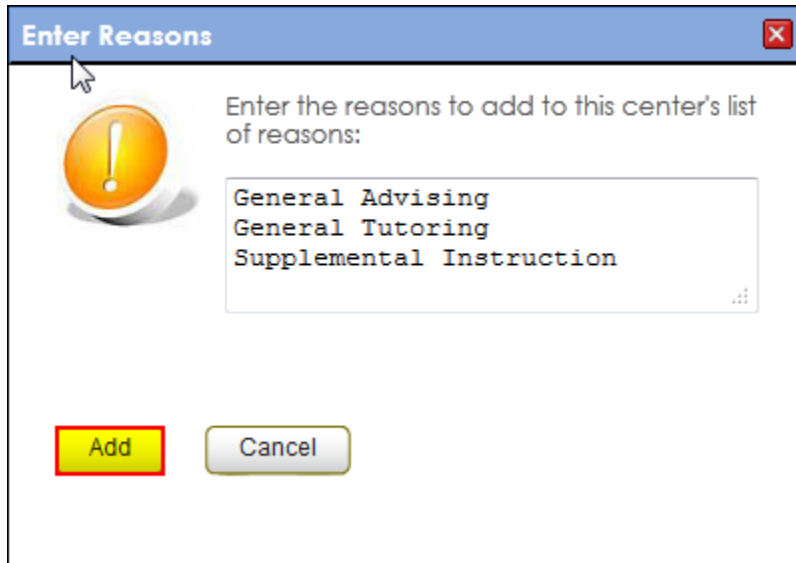
Assigning Reasons to a Subcenter

Once our Reasons have been created, we can "add" Reasons to your Subcenters individually. For this next example, let's say we have a Reason and a Subcenter – General Advising and the Advising Center. We would like the General Advising reason to be available in the Advising Center.

We can add the Reason to a center by first choosing a Subcenter through the **Subcenter Options** drop down menu. For the General Advising Reason, we would choose the Advising Center.

155
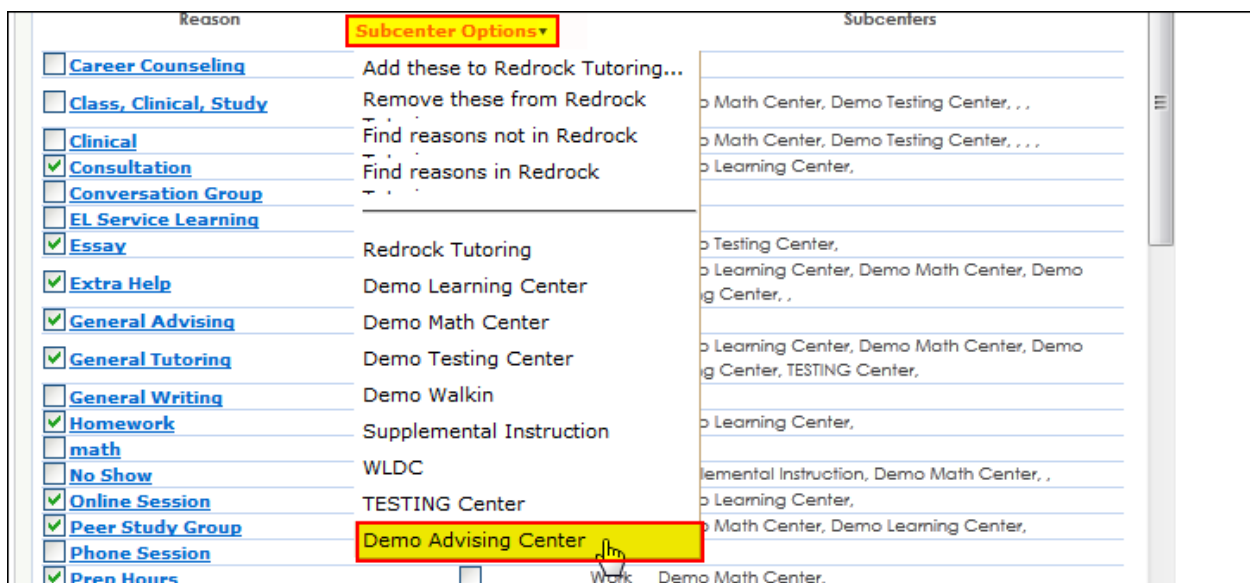
After we have selected the Advising Center, the system notifies us above the **Subcenter Options**.
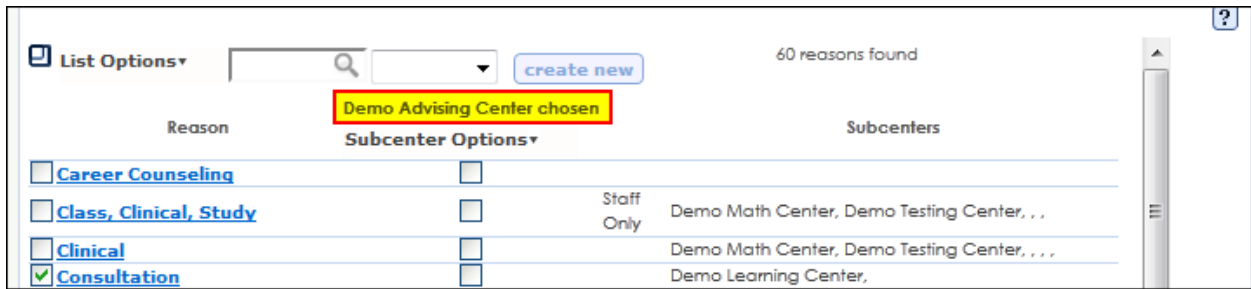
At this point we have two checkboxes beside each Reason, one to the left and one to the right (in the center of the window). The checkbox on the left side determines whether or not the Reason is active on a global level (for all Subcenters). The checkbox on the right determines whether or not the reason is active for the selected Subcenter (above). Make sure the checkbox on the left of the Reason "General Advising" is active.
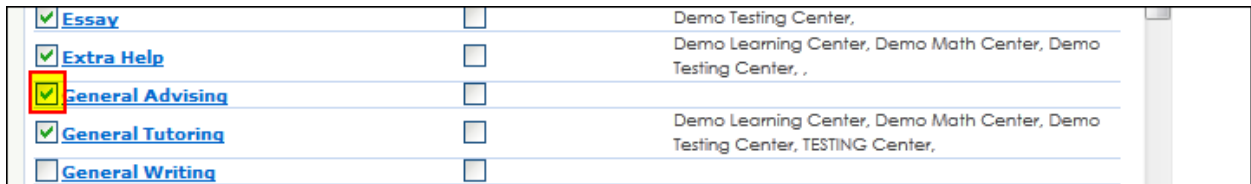
Because we want to activate the General Advising Reason for the Advising Center, make sure the Advising Center has been chosen, and then activate the checkbox on the right to add the Reason to the Subcenter.
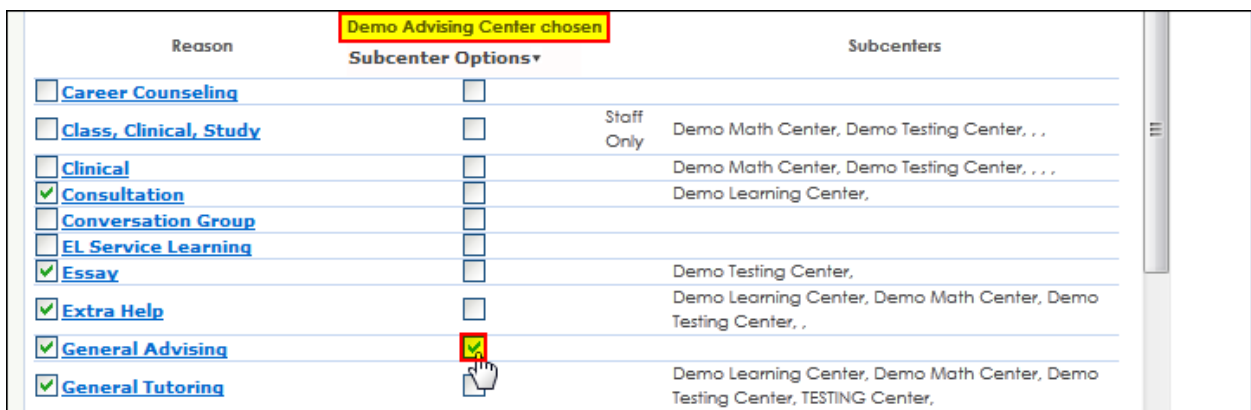
Now when the list of Reasons refreshes, the General Advising Reason shows a Subcenter Assignment to the Advising Center.

(Keep in mind that in the last screenshot, the checkbox on the right is deactivated as the Subcenter selection has since changed)

Subcenter Options

Adding Reasons to Subcenters can be done individually as shown through the process detailed above. Reasons can be added to multiple Subcenters simply by repeating the process for different Subcenters. There are several tools, however, under your Subcenter Options that allow some convenient shortcuts to be utilized.
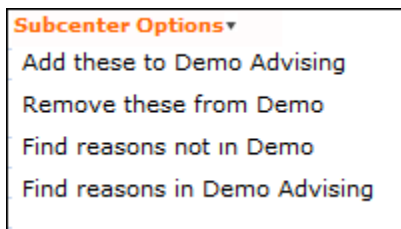
Add These To: The *Add These To* function will add ALL reasons to the selected Subcenter.

Remove These From: The *Remove These From* function will remove ALL reasons from the selected Subcenter.

Find Reasons Not in: The *Find Reasons Not in* function will find ALL reasons not assigned to the selected Subcenter.

Find Reasons in: The *Find Reasons in* function will find ALL reasons that ARE assigned to the selected Subcenter.

Editing a Reason

When you click on a reason name you can edit the reason and a series of preferences.

Is Staff Reason:

Do NOT SHOW for Appointments
Activating this preference will proceed to NOT display the selected reason in the Schedule – specifically in Appointment Entries.

Do NOT SHOW for Login/Out process
Activating this preference will proceed to NOT display the selected reason during the Login

Notify when student still logged in after ___ minutes
The "*Notify when student still logged in after ___ minutes*" preference is an especially useful tool for Testing centers. Here you can set a warning symbol to show up for a student that has been in a center for the allotted amount of time given for the test, which would then notify whomever is watching the log listing screen that their time is up for the test.

Snooze time = ___ minutes.
The snooze feature correlates with the warning, allowing you to turn off that alert for a few moments. This way, you can set up reminders that the student's time is almost up.

Recommended duration = ____ minutes
Recommended Duration is a setting that is used when creating an appointment. A student will not be allowed to schedule an appointment for a reason whose recommended time is longer than the allotted time for their appointment. If they try to, a warning alert will flash telling them that they will need more time available than what they are trying to schedule for that visit reason.

Auto logout after (___) minutes

The Auto logout feature allows you to set a maximum or default time for any visit that is logged in for that specific visit reason. This means that the Log listing screen will watch that visit (based on Reason selection), and once it reaches the max time indicated on the Auto Logout, it will automatically log a student out of the center, concluding their visit for that session.

If the *"minutes"* field to the right of *"Auto Logout after"* is filled in, any student that logs in with this visit reason will automatically be logged out of the center, with the auto logout time being set as their visit time for their visit. This option is useful especially for SI visits, Workshops, and Orientations, where the student will be logging in, but will not be returning to logout.

Do not wait full time
This preference, if activated, will not wait the full time to run the Auto-logout process, and consequently will log students out before the full set time has expired.

Work Reasons

Work Reasons can be utilized to track Payroll hours for Consultants. Consultants can log in and out of your centers in the same fashion as students do with the exception of using a different type of Reason. "Work" Reasons will not display for students, and "Work" Visits will by default be remain hidden on the Log Listing. Work Reasons can be an effective way to track, record, or confirm your Staff's payroll hours.

Creating a Work Reason

In the process of editing a reason (you may want to create a reason named "Work" or something along those lines) there is a preference, as shown in the screenshot above, entitled "is Work Reason" (Consultants only). If this preference is activated, Consultants will be able to log in using this reason. However, as students are the only group in the system that are allowed to log in, an important step in the process of logging work visits is to connect a Consultant account to a student account. To do this, we will navigate to the Consultant Profile. Hover over the *Search Glass* on the right side of the Trac Navigation bar and select *Center Profile*. Choose your Center Profile and navigate to the *Consultants* (or Tutors/Advisors depending on the label that you define) tab. Here we can click on a Consultants Name to access their profile.

In the Consultant's profile, navigate to the *Contact Info* tab. The *Student ID* field towards the bottom of the window determines whether or not this Consultant profile will be linked to a student profile. If the Consultant already has a Student Profile created, simply type their ID number or you can perform a search by entering last name, first name.

Click on the ID number of the appropriate student record to connect the two profiles.

Now when Jane logs in as a Consultant, she has the option to "Switch to Student Profile".
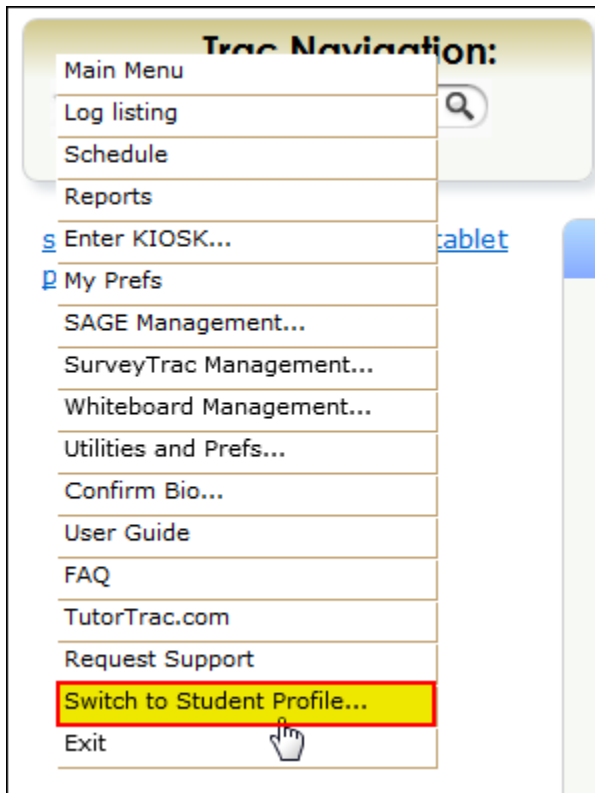
If Jane wanted to log some work hours, she could enter her ID or last name, first name into the *Log Student* window to log in.
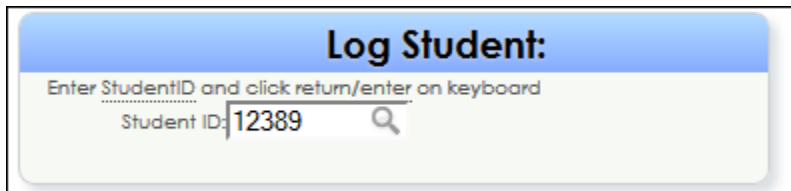
Now when Jane logs in, she can select both the Work subject and Work Reason, as her Consultant account has been linked to her Student account.

Choose A Reason

Jane,
Please choose a reason and subject for the visit:

Select a Subject:

ECON195 900T 20112 ECON195-900T
ACCTG110 205 20112 Fundamentals of Financial Accounting
ACCTG111 202 20112 ACCTG111-202
CIS106 200 20112 CIS106-200
Work Work by Tutor

Select a Visit Reason:

Consultation
Extra Help
General Tutoring
Homework
Online Session
Peer Study Group
Research
Tutor Work Sign On
Work

Continue

Chapter 7: Consultant Records

Consultants represent an essential Group of Users for all Trac systems. Consultants are typically Tutors and Advisors, but a Consultant can represent any Group that meets or consults with Students. Consultants, like Students, must be assigned Profiles within your Trac System in orded to fully utilize certain functions; for example, access to the Schedule. The only group that is required to have a Schedule is the Consultant Group, or in other words, in order for a User to have their own Schedule, they must be a part of the Consultant Group.

Consultant Profiles, unlike Student Profiles or Faculty Profiles, are not contained in a List or Listing. Consultants are uniquely organized within the Center Profile. There are a few steps we will need to take to begin to setup Consultant Profiles.

Term for "Consultants"

First, Consultants are able to be defined by the term of your choice. As examples, typically with TutorTrac profiles, Consultants are named Tutors, and for AdvisorTrac profiles, Consultants are named Advisors. To define this classification we will need to navigate to your Center Profile.

To get to your Center Profiles, hover over the Search Glass on the right side of your Trac Navigation bar (upper left corner of Main Menu). Select Center Profiles and click on your Center Profile.
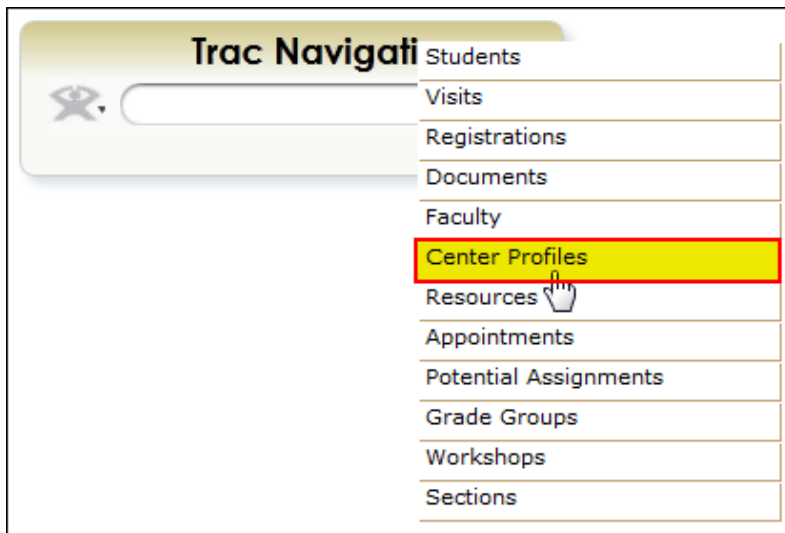
The first tab selected in your Center Profile window will be the General Tab. Located underneath the Contact fields is the preference "Name for Consultants".

Underneath the Name for Consultants field is the "Default Group for Consultants" preference. Here we must define the default Group which Consultants are assigned to.

Creating Consultant Profiles

Now that we've defined the Term and Group for your Consultants, we are able to create individual Consultant Profiles. To do so, we must navigate to the Consultants Tab of your Center Profile.

To get to the Consultants Tab of your Center Profile, hover over the Search Glass on the right side of your Trac Navigation bar (upper left corner of Main Menu). Select Center Profiles and click on your Center Profile. Navigate to the Consultants Tab three tabs to the right of the General Tab selected by default. Keep in mind that the name of this Tab will change if you have changed the Name for Consultants preference previously mentioned (i.e. Tutors, Advisors)

Click on List Options, then select Create New.
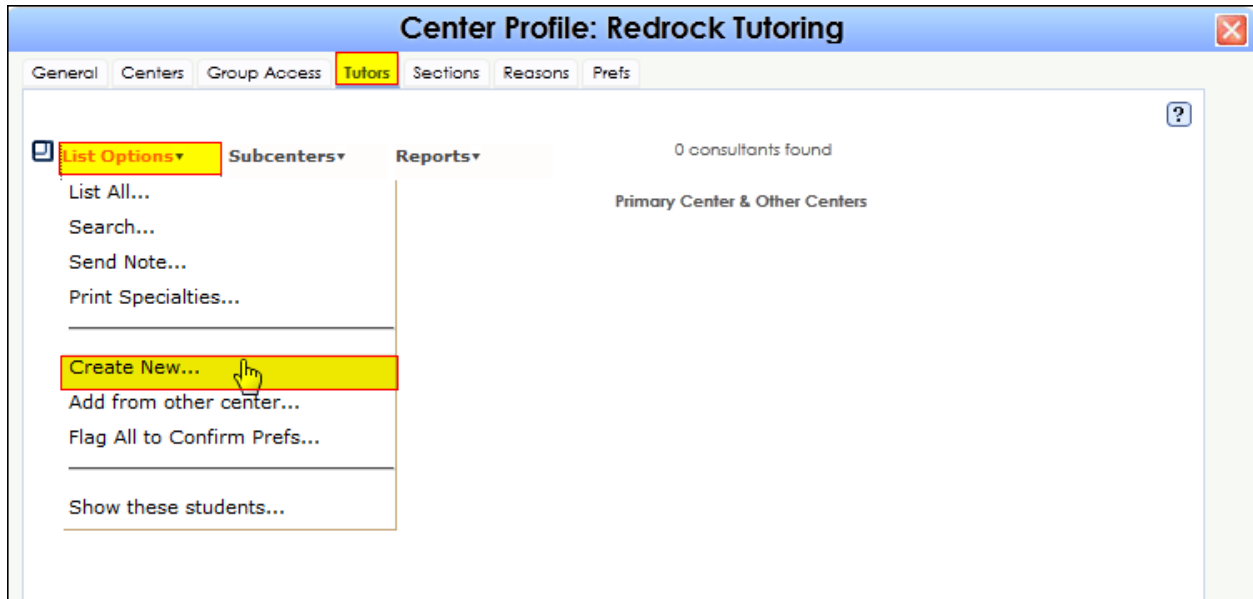
The first tab selected in the new Consultant Record is the General Info Tab. Here we can enter information regarding Contact info, Section Specialties, Certifications, or any relevant information for our Consultants. First, let's enter a *First Name* and *Last Name*.
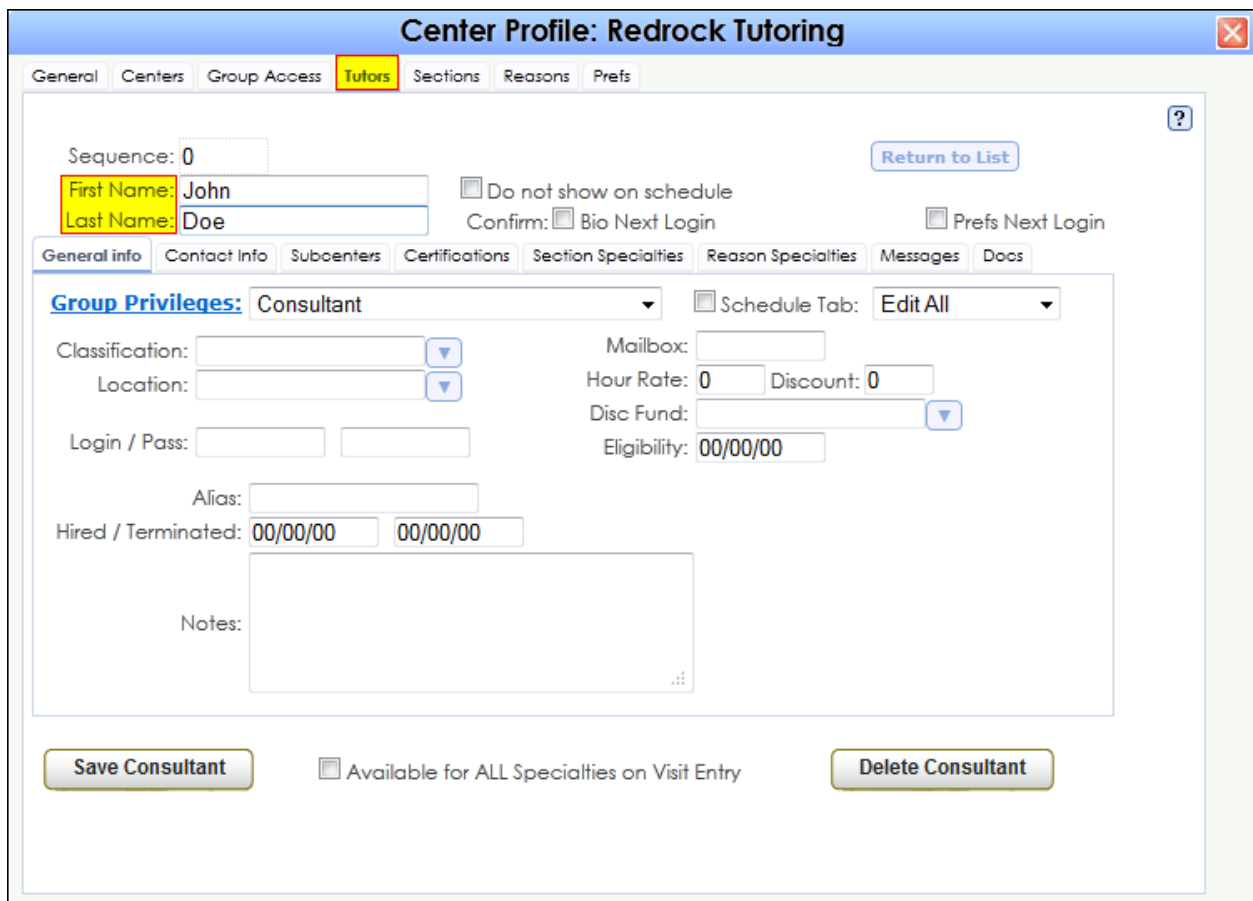
From the Group Privileges drop down menu, select the Group your Consultant will be assigned to. The Group you select will define the set of Privileges assigned to your Consultant.

If your Consultant needs to be further classified, you can use the Classification field to further Group your Consultants (i.e. Assigned Advisor, Professional Tutor).

The location field can designate a sort of "home" location or a common meeting area for your Consultant. Both Location and Classification can be displayed on your Consultant Schedule for users' reference as they book appointments (see Chapter 3: Setup – Prefs – Scheduling section).

After you have filled out all relevant information, click "Save Consultant" to Create the Consultant Record.

Click on the Contact Info Tab. Here we can enter some basic contact information for your Consultant.
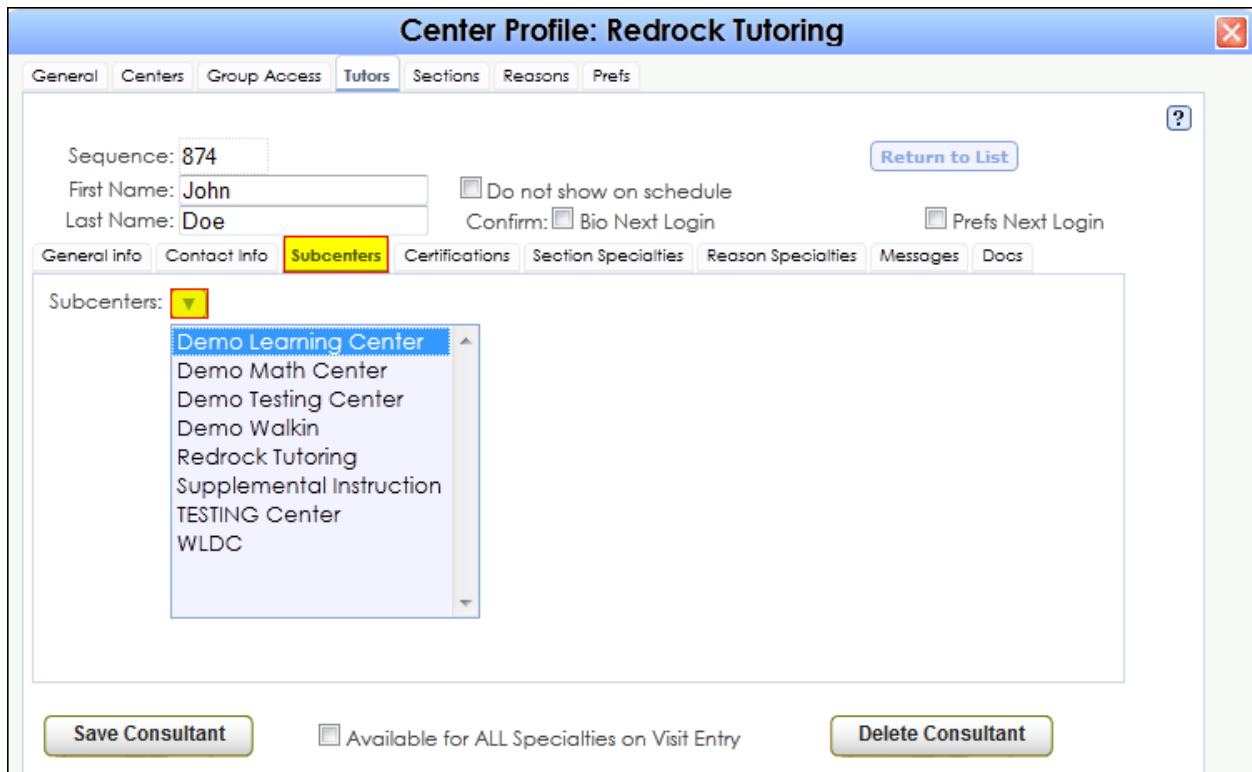
The "Student ID" field towards the bottom of the Contact Info Tab allows a Consultant Profile to be linked to a Student Profile. This is useful for several reasons. First, a Consultant who is both Consultant and Student can consolidate their accounts and only login using one username and one password. Second, a Consultant who is both a Consultant and a Student can differentiate the roles of each account and access unique functions of each role. Third, for a Consultant to login for a Work Reason (See Chapter 6: Reasons - Work Reasons) they must have a linked Student Account to be able to record a Visit. To link a Consultant Profile to a Student profile simply type in a Name or ID to begin a Live search (last, first for names), and click on the Student's Profile when found.

Subcenter Assignment

Click on the *Subcenters* Tab. Assign Subcenters for your Consultants by clicking the blue dropdown arrow and selecting the appropriate subcenter(s).

Assigning Subcenters to a Consultant is essential in providing them the access that they need. Select a Subcenter from the List by to assign this Consultant to a Subcenter.

Click on the *Certifications* Tab. Any type of Certification can be created and recorded here for reference purposes. Click "*Create New*" to create a New Certification.
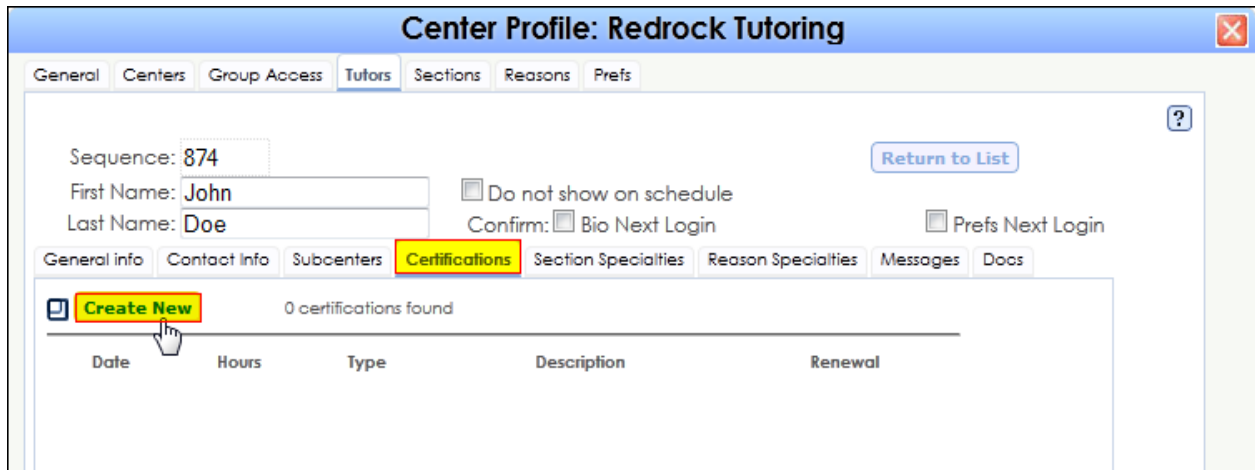
Section Specialties

TutorTrac Profile: Click on the *Section Specialties* Tab. Assign Sections as Specialties for this Consultant by checking the checkbox for the appropriate sections.

170
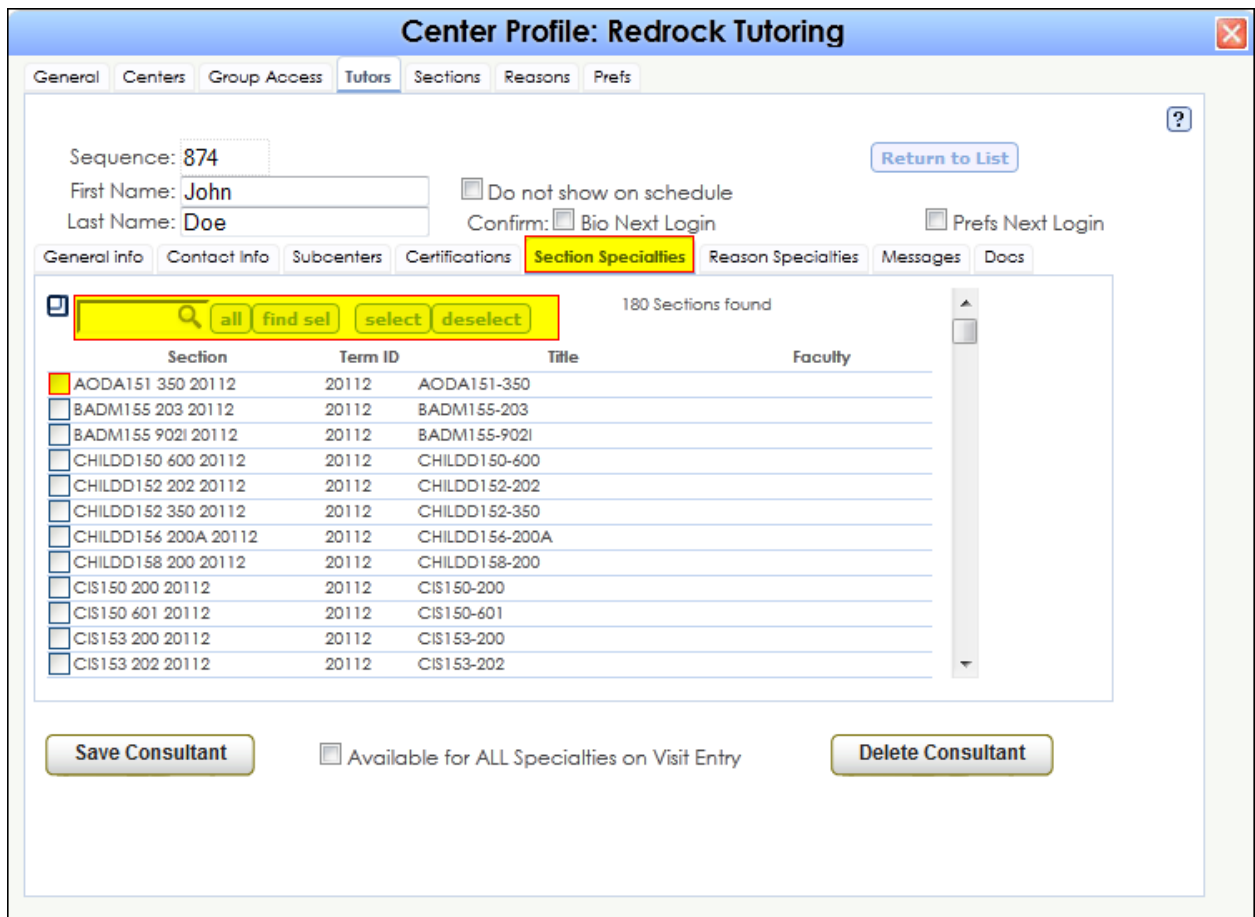
You can use the Search field [🔍] to narrow your search. Clicking on the **all** button will load ALL sections. Clicking on the **find sel** button will only display the sections the Consultant currently specializes in. If, as an example, you are looking to assign all English sections to a Consultant as specialties, enter "ENG@" in the Search field to include all courses that begin with "ENG". After performing the search and finding your selection of English courses, click on the **select** button to assign these courses to the Consultant as specialties.

Let's say that we search for the term "20112". The system returns with 180 results, showing 180 sections found. If we click on the **select** button, the system will assign these 180 sections found to our selected Consultant as Section Specialties. If we click on the **deselect** button, the system will deactivate the selection of courses as section specialties.

To assign ALL available sections as Specialties, type "@" into the Search field and hit enter or return to perform the search. Now click the **select** button to assign ALL courses as section specialties.

Reason Specialties

AdvisorTrac Profile: Click on the *Reason Specialties* Tab. Assign Reasons as Specialties for this Consultant by checking the checkbox for the appropriate sections.

You can use the Search field [search field] to narrow your search. Clicking on the [all] button will load ALL Reasons.

Click *Save Consultant* to save the additional settings for this Consultant Record. Click *"Return to List"* to return to the list of Consultant Records under this Center Profile.

Copy Specialties Utility

The Copy Specialties Utility allows you to copy the same sections from one term to another.

The Copy Specialties option is found in the Utilities and Preferences. Select the Custom Utility Tab and click on Copy Specialties.

The Copy Specialties Utility allows you to specify some options. Specify which term the specialties are copied from and to which term they are copied. Choose whether the previous tutor specialties are removed or are left as tutor specialties. Select if the Copy Specialties Utility will be run for all tutors from all centers, for all tutors from a specific center, or for just a specific tutor. Click **Execute** to run the Utility.

Chapter 8: Student Records

The potential power and utility of the Data that you collect through your Trac system is highly dependent upon the quality of your Student Records or Profiles. The Student information entered into your Trac system database greatly affects the potential of Reporting capabilities, Scheduling functions, and general Data collection. Information within the student profile should be added in a purposeful, precise manner. If, for example, your campus wants end of semester reports based on Ethnicity, GPA, Gender, and Athletic Status, we need to keep these fields in mind when inputting Student Data into your Trac System.

Student Entry Form

There are a variety ways to access a Student's Record. Student IDs or Student names can be entered directly into your Trac Navigation bar to perform a search for a particular student. Advanced searches may be performed to find a Group or Selection of students. We may also access a Student Profile directly from the Student Listings, which is essentially a List of All student records.

To get to the Student Listings, hover over the Search glass on the right side of your Trac Navigation bar (top left corner Main Menu) and select Students.

The Student Listing simply lists all the Student records contained in your Trac System. We are able to List ALL students or search for a selection of students (see Chapter 19: Tips and Hints - Search).

For this example, type the number "1" into your Trac Navigation bar in the top left corner, then hover over your Search glass and select Students.
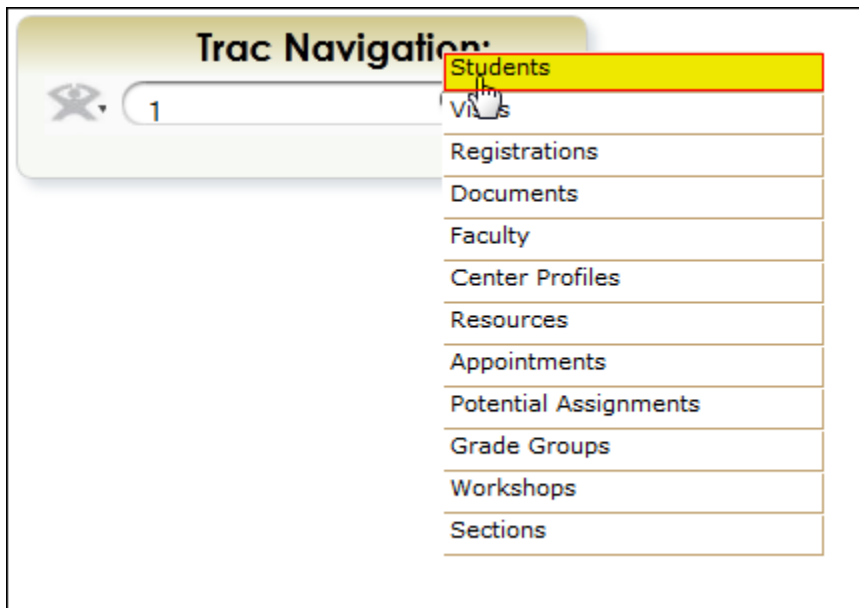
When we have found our selection, we can click on the ID# field that acts as a hyperlink to the Student's Record.

This will open the Student Entry Form which displays Student's information.

General Info / Basic Info Tabs

The General Info and Basic Info Tabs contains the essential contact and demographic information of a Student's Profile. These fields can all be imported from your Student Information System, or entered manually for each Student (*See Student Import section at the end of this chapter*). A student's Username and Password can be modified by clicking the "Handle" field, and Text Alert activation codes can also be generated here.

Custom Campus

To the right of the Basic Info tab on the bottom half of the Student Entry form is the Custom Campus Tab.

The Custom Campus Tab contains the 9 custom fields available for your Campus (9 custom fields per Center Profile). You can customize and design these Custom Fields to track any fields that are not able to be measured through the standard fields available in the General and Basic Info tabs.

Documents

The Documents Tab allows users to upload Electronic Documents to a Student's Record. Any relevant Documents such as Graduation Checksheets, Tutoring Applications, or Assignments can be tracked and recorded here. Documents, like Resources, are also able to be classified by Type, and thus Privileges can be assigned to Groups based on Document Types.

To upload an electronic Document to a Student's Profile, click on the blue Upload... button at the top left corner of the Documents Tab.

Hover your mouse over the "Choose File For Upload" option below, and click "Browse" to locate the file on your computer.
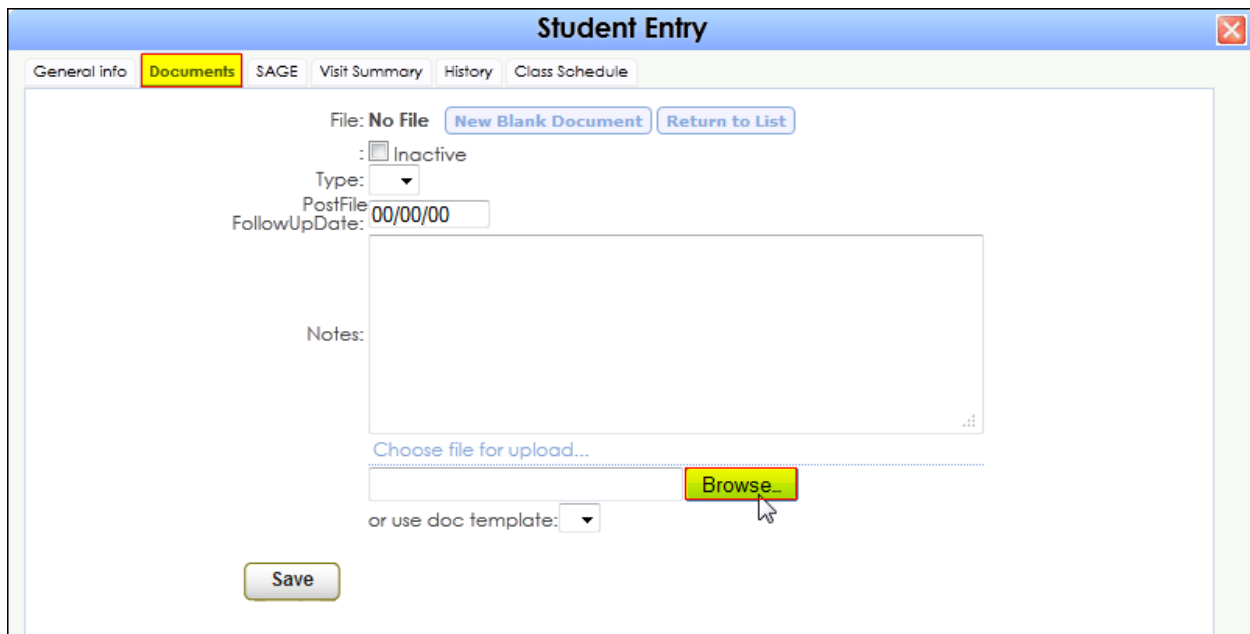
You can classify a Document Type by clicking on the Dropdown menu next to "Type". You can also add a description of the file in the "Notes" field. When you are finished, click the "Save" button to Save the Document on the Student Record.

SAGE
The SAGE Tab keeps a detailed history of any Referrals made for the selected Student. New Referrals can be created for the selected student here as well, as long as the User has the appropriate access (see Chapter 3: Setup – Prefs - Admin / Modules section).

To create a Referral, click on the blue New… button to start the process. Choose the Referral Type from the dropdown menu. These Referral Types are customized by your campus. To create Referral Types, see chapter 20: SAGE – Referral Types section for more info.

Visit Summary
The Visit Summary Tab gives you a Quick Snapshot summary of the selected student's Visit History. Data is broken down by Center, Reason and Subject, and total numbers are given for the number of visits made, and total amount of hours visited per center/reason/subject.

Class Schedule
The "Class Schedule Tab" contains a Schedule that allows a student's Class Schedule to be entered. This may be beneficial for Scheduling purposes, first being able to check for Scheduling conflicts as Appointments are booked and Visits are made. Consultants will also be able to use this information either for Advising or Tutoring Purposes, or the Schedules could be made available to students as an Auxiliary calendar. Contact Redrock Support for additional details or questions (support@go-redrock.com).

History
The History Tab gives a detailed history of 6 major aspects of the Student Record.

Visits

The Visits subtab gives a detailed history of the student's Visit records. Users can click on individual visits to view/edit the available information. New Quick Visits Entries can also be entered manually for the selected student here as well.

Appointments

The Appointments subtab gives a detailed history of the student's Appointment records. Users can click on individual appointments to view/edit the available information.

Prog Rpts

The Progress Reports subtab displays a student's current Grades. Individual Progress Reports can be created, viewed, or edited here. Course Information will need to be imported for this Utility to function. Contact Redrock Support for additional details or questions (support@go-redrock.com).

Registrations

The Registrations subtab contains a record of the student's course enrollment organized by Term, Course, Title, Section, Instructor and Grade. Course Registrations can be imported from your Student Information System, or entered manually for each Student.

Resources

The Resources subtab contains a history of any Resources the student may have checked out. Items are organized by ID, Title, Date Checked Out and Date Returned.

Messages

The Messages subtab contains a history of any Messages the student may have received through the Trac system. Messages can be classified by Type, and thus only viewable by the parties deemed appropriate to do so. Most commonly messages will be Reminder/Confirmation emails or Missed/Cancellation emails; however any Text messages sent to the student can also be tracked here.

Creating Student Profiles

We can enter Student information into your Trac system either manually or automatically through an Import Process.

To create a Student Profile, we will need to access the Student Listings. To get to your Student Listings, hover over the Search Glass on the right side of your Trac Navigation bar (top left corner of Main Menu) and select Students.

MANUAL STUDENT ENTRY

To create a new Student Profile manually, click on List Options and select "New Student".

Clicking "New Student" will open a blank Student Entry Form.

Here any relevant information can be entered for a new Student Record manually.

STUDENT IMPORT

Student information may also be Imported into your Trac system from your Student Information System. Whether your campus uses Banner, Datatel, Peoplesoft, or even a homegrown system, we can extract data from your Student Information System and Import the appropriate data into your Trac system. This process can be run on a manual or automated basis.

First, based on the Student Entry Form, decide which specific fields need to be extracted from your SIS. For example, Last Name, First Name, Address, Email, Birthday, Ethnicity, Grad/Und, College, Major, or GPA etc..

Once you have decided which fields would be beneficial or essential, we will need to work with your Campus' IT department to facilitate the data Extract from your SIS. Create a sample data file and send it to Redrock Software Corporation (support@go-redrock.com). Acceptable data file formats are tab delimited (ASCII), comma delimited (csv), or fixed character position (ASCII). An import map is then created based on the sample file.

After the fields are chosen, the data file is created, and the import map is written, your Trac System can run the import process automatically. First, the data file should be updated and saved to the same location on a daily basis. The campus IT personnel may write a script to automate this process. At this point we will also need to set a time within your Trac system for the Automated Import Event to run. The import will then update each day automatically, providing the most current information from the campus SIS database.

Here is a table detailing Student fields.

STUDENT FIELDS

Name	Type	Required	Field Description
ID	#L	Yes	The unique numeric ID of the student
Other ID	A20	*	A secondary ID (or barcode) for the student - barcode may be required if you plan on utilizing a barcode scanner or magnetic card reader to sign in your students
Last Name	A40	Yes	The last name of the student
First Name	A40	Yes	The first name of the student
Middle	A20		The middle name/initial of the student
Street Address	A60		The street address of the student
City	A50		City of the student address
State	A2		The state code of the student address
Zip	A10		The zip code of the student address
Email	A80	*	The email address of the student - may be required if you plan to send emails to your students; including automatic appointment reminders
Full Name	A80		The student name formatted as Last, First Middle - your Trac product will compute the student full name automatically
Home Phone	A20		The student home phone number
Work Phone	A20		A secondary phone number for the student
Gender Male	B		The gender of the student is stored as a boolean - the only options are Male or Female and all students default to Female
Birthdate	D		The student birthdate
Ethnicity	A60		Ethnicity (could be a code or complete name)
Grad Und	A80		A code that indicated Graduate or Undergraduate (usually "G" or "U")
College	A80		What college the student is attending
Class	A80		The student's class: Freshman, Sophomore, etc. or FR, SO, JR, SR or 2003, 2004, etc.
Cohort	A80		Used to custom group the student records. Use of this field is

			determined by the TutorTrac administrator.
Major	A80		The student's major. May be a code or complete description.
Handle	A20		The student's web login name. Not needed if the student is not going to login via the web. Also may be configured by the student the first time the student logs in via the web.
Password	A20		The student's web password. See Handle for notes.
ReferredBy	A80		Who referred the student to the center.
Degree Goal	A80		Either the Degree Earned or the Degree Goal.
Overall GPA	#R		The Overall GPA for the Student (EMCCGPA)
Total Hours	#R		Total Accumulated Hours for the Student (BMI1)
HS Name	A30		Name of the High School Attended
Custom Field1	A80		A custom field that may be used for any purpose.
Custom Field2	A80		same as above
Custom Field3	A80		same as above
Custom Field4	A80		same as above
Custom Field5	A80		same as above
Custom Field6	A80		same as above
Custom Field7	A80		same as above
Custom Field8	A80		same as above
Custom Field9	A80		same as above
Special Status	A80		A student status field: may be a code or description.

Chapter 9: Availabilities

Availabilities: In order to schedule appointments through the Trac system, you need to first define the time slots that the consultants are available. Available times are posted to indicate the date and time that Consultants are available to hold sessions, and also so appointments may be scheduled by several different users, including the students themselves.

A consultant's availability will establish the *date and time range* of when the consultant is available for appointments. The availability also sets up session information regarding the number of students that can join an appointment, for what section or reason the consultant is available, and also if the appointment will be scheduled once or repeated on a weekly basis.

Which group(s) of Users will be responsible for setting up Consultant Availabilities (the times that your Consultants are available)?

- Consultants (Tutors/Advisors)
- Front Desk Workers
- Administrators

To access your schedule click the TracMan Icon on the left side of the Trac Navigation. Click Schedule to access the full schedule view for your centers.
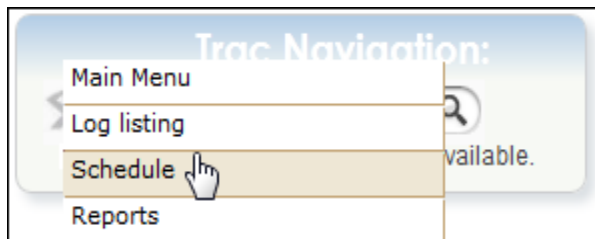
Set up your Consultants' Availabilities

The full view of the schedule has three components:

- Schedule Grid

- Date Chooser

- Personnel Listing

Click on your Center Name to load the schedule for all of the consultants in that center. The Date Chooser allows you to select which date to view on the schedule. The Schedule Grid displays the consultants across the top row and the times of day in the left-hand column.

Click on your Consultant Name to load the week schedule for that specific consultant. The Date Chooser allows you to select which week to view on the schedule. The Schedule Grid displays the days of the week across the top row and the times of day in the left-hand column.
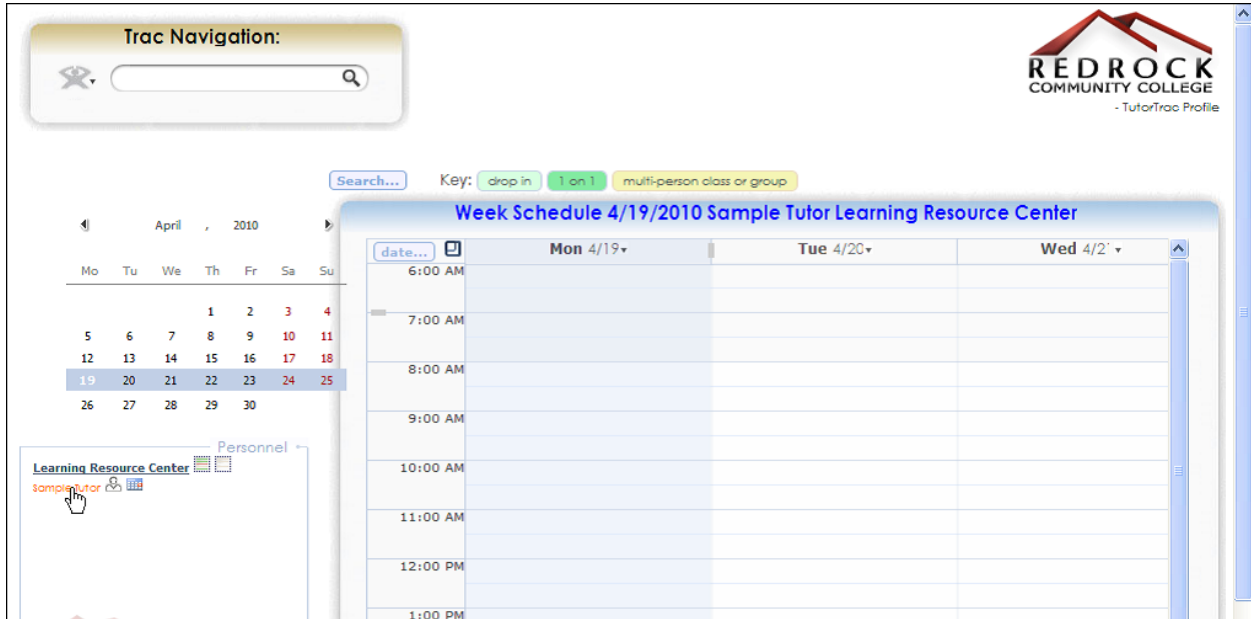
Click on a Start Time for the consultant availability.
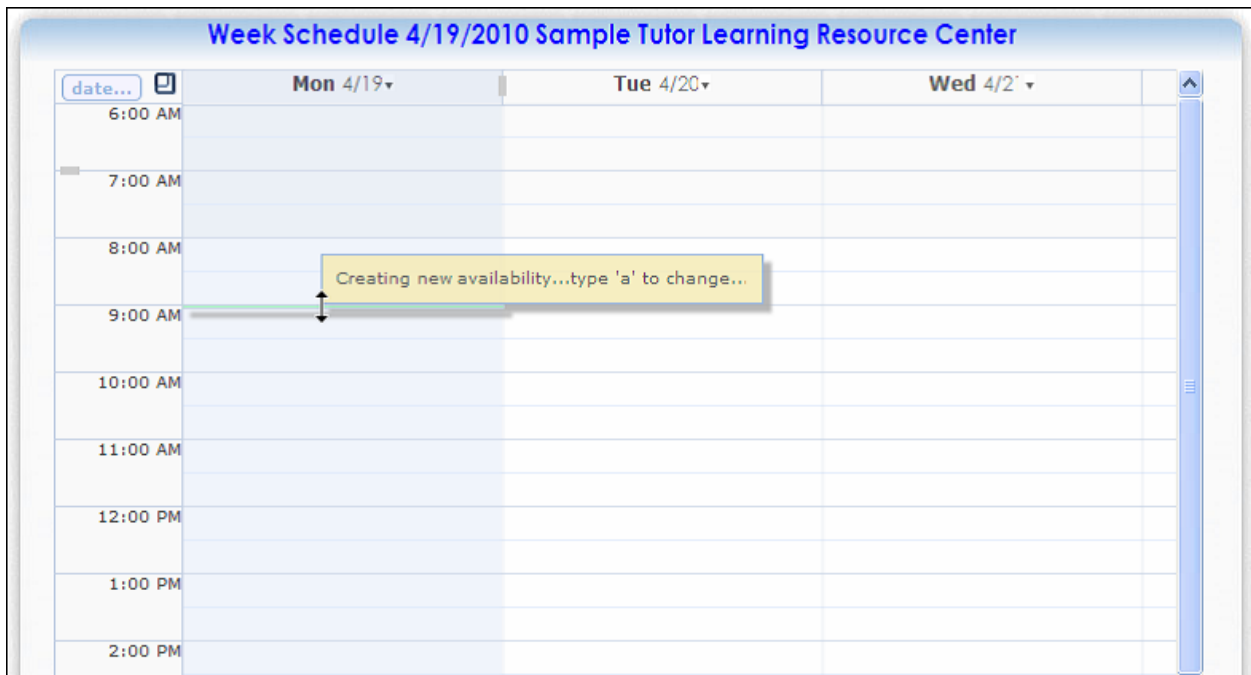
Hold your click and drag your mouse down to an End Time. Then release the mouse click.
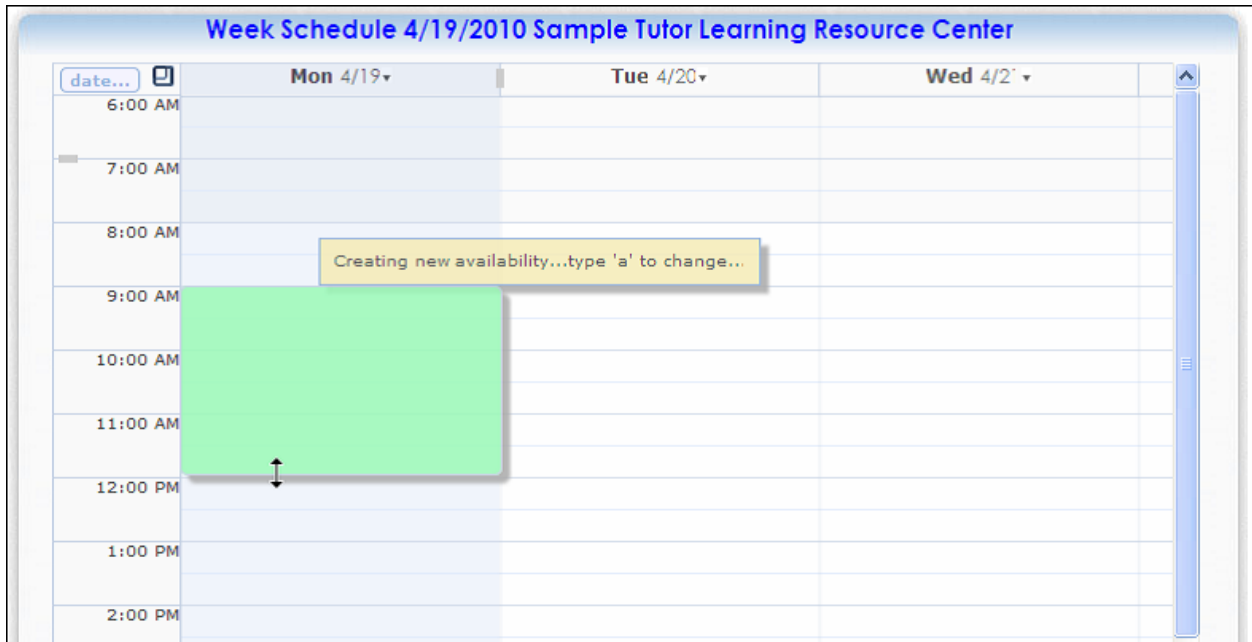
When you release the mouse click, the Availability Entry window will appear. The Availability Entry window allows you to enter details about the Consultant Availability.

Availability Entry Options

- Center, Location, Subject, Reason
- Date from, Date To, Days
- Drop In (Blue Color)
- One-on-One (Green Color)
- Group (Yellow Color)
- Divide into Slots
- Breaks
- Repeating/Recurring
- Multi-Slot Booking
- Availability Blocks

Date range
Use the *From* and *To* Date calendars to choose a date range for this availability.

Click and highlight the days of the week to create the availability on the selected days.

Availability Types
A *Drop-In* Availability is set up by creating an availability with a maximum of zero students.

A *Single Person* Availability is set up by creating an availability with a maximum of one student.

A *Multi-Person* Availability is set up by creating an availability with a maximum number of students greater than one. Only the specified number of students will be able to schedule an appointment in this time slot.

Divide into Slots

You can break the full time slot into smaller time slots. Click the time entry field to *Divide into Slots (HH:MM)* and enter a time slot of 01:00. Press the *Enter* key or click the X to close the HH:MM entry.

Click *Save* to save this availability. The schedule will update after the Save.

The Single Person Availability (One-on-One) appears on the schedule with a green color.

The availability has been created from 9:00am to 12:00pm on Mondays and Wednesdays.

Breaks

The breaks field can be used to add break periods within an Availability. For example, if a Consultant typically holds 50 minute sessions followed by ten minute break periods, we can set up the Availability by using the Divide into Slots and Break fields. Let's say we were creating a 5 hour Availability for our Consultant Jane Doe on Monday from 7am to 12pm. From her Schedule, we drag our mouse cursor between the appropriate times.
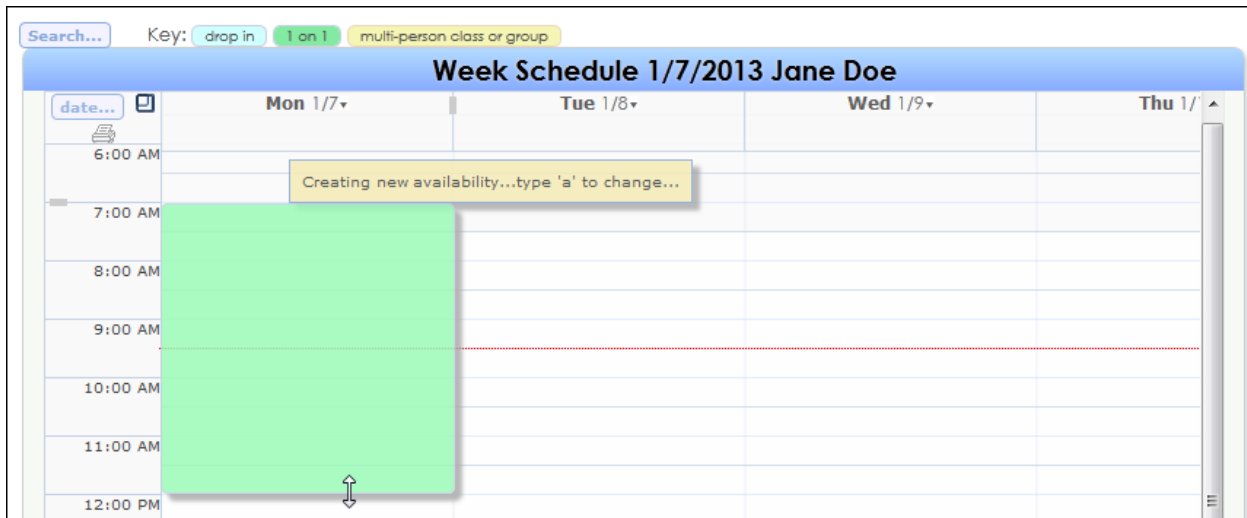
In the Availability Window that appears, we will set the "Divide into Slots" field to 00:50 hours (50 minutes) by clicking on the Blue Clock to the right of "Divide into Slots".
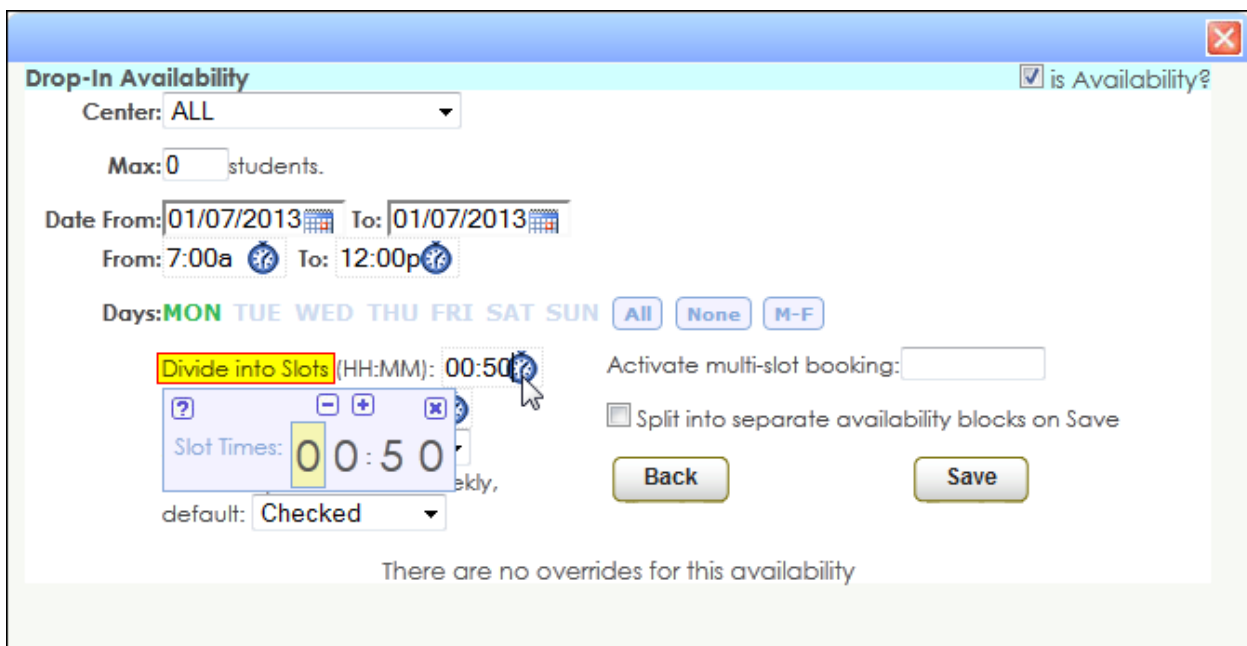
We will also set the "Breaks of" field just below to 00:10 hours (10 minutes) by clicking on the Blue Clock to the right of "Breaks of".

After clicking "Save", Jane's Schedule then refreshes to reflect the newly created Drop-in Availability with 50 minute time slots and 10 minute breaks.
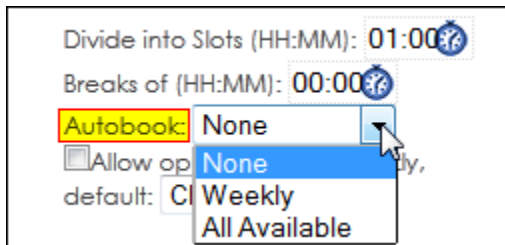
Repeating/Recurring

A Repeating or Recurring Availability can be created simply by extending the "Date From" field for an Availability. For example, if our Consultant Jane Doe is available Every Monday at 8:00 am for the entire semester, we would change the date from and date to fields to the appropriate semester start and end dates. The availability would then be created Every Monday for the entire semester.

The option for a Student to book a Recurring appointment (i.e. every Monday at 8am for the entire semester) can be enabled through two fields: the "Autobook: (None)" and the "Allow option to book weekly" fields.
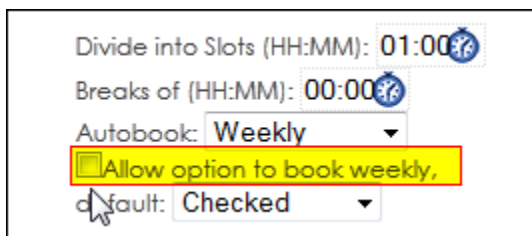
The Autobook: (None) field will automatically book either ALL AVAILABLE appointments, WEEKLY appointments, or NONE. For example, let's say that Jane added Wednesday at 8am to her Recurring Availability. So now she is available Monday and Wednesday at 8am for the entire semester. If this option is then set to ALL AVAILABLE and a student books the appointment for Monday at 8am, the system would automatically book for the student ALL recurring appointments with Jane Doe under this Availability. In other words, the student would be booked both Mondays and Wednesdays at 8am with Jane Doe for the entire semester. If the Autobook: (None) field is set to WEEKLY, the system would ONLY automatically book the Monday appointment at 8am for the entire semester.

The "Allow option to book weekly" field determines whether or not the Student has the OPTION to book Recurring Appointments. In this case, the system would not automatically book the Recurring appointments. If the student selects the option to book a Recurring appointment, the system will book the Recurring Appointments based on your selection in the previous Autobook: (None) field. If the Autobook: (None) field is set to ALL AVAILABLE, then the system will book ALL available Recurring Appointments. If the Autobook: (None) is set to Weekly, then the system will book a Recurring appointment, but only on the day specified by the Student.

The "default" field determines whether or not the "Option" to book weekly initially appears Checked or Not Checked. We typically recommend setting this default field to "Not Checked", so that if a Student wants to book a recurring appointment, the Student has to manually check the box. This also prevents students who do NOT want to book recurring appointments from accidentally or unintentionally doing so.

Multi-Slot Booking
The Multi-Slot booking field allows a Student to book multiple time slots in a convenient manner. If Consultant Jane Doe's five hour Availability is divided into one hour slots, a Student, when booking an appointment with Jane, has the option of booking a single one hour time slot or multiple one hour time slots. In order to activate the Multi-slot option, we need to enter Time Slot intervals in the "Activate multi-slot booking" field. If Consultant Jane Doe divided her Availability into 01:00 hour slots, we can "Activate multi-slot booking" by entering, for example, "60;120" into the "Activate multi-slot booking" field. This will allow students to then be able to book either one hour time slots or two hour time slots.

Availability Blocks

An Availability Block is simply a restriction users can place on their schedules that indicates times when Consultants are NOT available for appointments. These are typically used for Holidays, Lunch Breaks, Meetings, Emergencies, or last-minute Cancellations.

In the Availability Entry Window, simply uncheck the *"is Availability"* field in the upper right corner to create an Availability Block.

You can modify the date range, duration, days, and Reason appropriately, and add a brief description. Click "Save" to save the Availability Block.

Center Availability Blocks

To add an Availability block for an entire Center, we will need to navigate to the Center Profile page. Hover over the Search Glass on the right side of the Trac Navigation Bar (top left corner of Main Menu) and select Center Profiles. Click on your Center Profile and navigate to the *Centers* Tab. Find the

Subcenter that you would like to create an Availability block for and click on this Subcenter. In the bottom half of the Center Profile window that appears, the system will list any Availability blocks that currently exist for the Subcenter in selection.

You can click on the date under the "date from" field that acts as a hyperlink to the Availability block to access and edit the existing Availability block. If none exist, click on the blue "new" button to create a new Availability block for the subcenter you've selected.

Here in the Availability Block window, users can modify the details of the Availability block. Customize your date range through the "Date from" and Date To" fields. Edit the time through the "From" and "to" fields. Select the appropriate days which apply, and add a description in the "description" field if necessary.

Chapter 10: Appointments
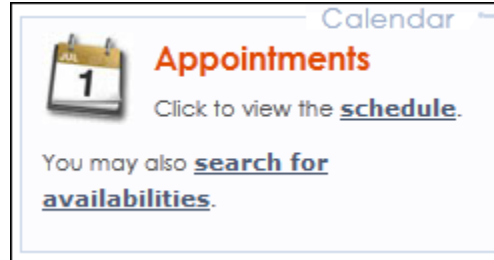
An appointment is a scheduled meeting (Past, Present, or Future) between Consultants and Students. Creating Appointments and accurately recording Appointment data are essential in regards to facilitating an efficient Scheduling process, with the exception of the case in which your center(s) only handles Drop-ins or Walk-in Visits.

The booking of appointments can be handled by any group: Administrators, Front Desk Workers, Consultants, or Students themselves. Typical Appointment data include Appointment Statuses (Attended, Missed, Cancelled), Appointment Notes (any notes entered by Consultant or Student), Total Number of Appointments, Appointment Duration, Subject/Reason of the Appointment, and which Consultant participated in the session.

Appointment Process / Workflow

How will our Centers handle Appointments and Scheduling?

The process of handling Appointments is vital to a Center's successful collection of data. The process and workflow of a Center determines the efficiency with which Scheduling is handled, as well as the accuracy of the collected Appointment data as well as Visit Data. Similar to the Visit Process, there are several ways to handle the Appointment / Scheduling Process through your Trac System.

Second, which group(s) of Users will be allowed to book appointments for Students?

- Front Desk Workers Booking Appointments
- Tutors/Advisors Booking Appointments
- Students Booking Appointments

Booking an Appointment *(as a Consultant, Front Desk Worker, or Administrator)*

As a Consultant, Front Desk Worker, or Administrator, we can book an Appointment from our Administrator's view of the Schedule.

To Access your Schedule click the TracMan Icon on the left side of the Trac Navigation. Click Schedule to access the full schedule view for your centers. Click on a Consultant's Name in the Personnel Listing on the left hand side to open a specific Consultant's schedule.

How to book an Appointment (as a Consultant, Front Desk Worker, or Administrator)

Next to any single person or multi-group Availability created (not Drop-in), there is a Blue dropdown arrow (▼) that, when clicked, will open a Search field. In this search field you can search for a Student by Name or ID, and upon clicking on the Student's name the Availability Entry Window will appear.

199

Clicking on Sam's ID number will begin the process of booking the Appointment by opening the Appointment Entry window.

Here in the Appointments Entry Window, we can the details of our Appointment. Here in the Appointment Info tab, you can add the appropriate data for the session that will occur. The *Center*, *Date*, *Time*, *Duration*, *Student ID* and *Consultant Name* will automatically populate based on the information entered for the Availability. You can at this point fill in the remaining fields if necessary: *Reason, Subject, Location*, and any *Visit Notes* that may apply.

An essential field that remains is the "*Status*" field on the right side of the Appointment Entry Window. The "*Status*" field defines the status of the appointment (Attended, Missed, or Cancelled) and is typically not filled out until after the Appointment has occurred, but we will go over this process (Post Visit/Appointment Data Collection) in more detail further in this Guide.

Booking an Appointment *(as a Student)*

As a Student, we can book Appointments using the Search for Availability Window, which allows users to Search for Time slots that indicate when Consultants are available. By simply searching for Availabilities, students are unable to access any sensitive data such as existing appointments with other students, Consultants, or any irrelevant contact info.

To Search for an Availability, hover your cursor over the Search Glass Icon on the right side of the Trac Navigation. Click Appointments to access the Search for Availability Window. Keep in mind that this path to the Availability Window is from an Administrator's perspective. Typically, a student will log in with their student credentials and navigate to the Search for Availability page using the process shown through the following screenshots.

When logged into your Trac system as a student, options are significantly more restricted. Access to a variety of Preferences and Navigational Tools are unavailable; rather, the student has access only to the necessary functions that you as an Administrator deem to be appropriate.

Sam Smith, our sample student for example, is allowed to Search for Availabilities, Confirm his BIO, Search for Resources, View his own Visit History, or Post an electronic Document. All of these links are located on the left side under "Student Options".

Sam Smith can click on the Search Availability button on the left hand side to open the Search for Availability Window.

Next, Sam is prompted to select a Center. When he has chosen a center, additional search criteria will load below.
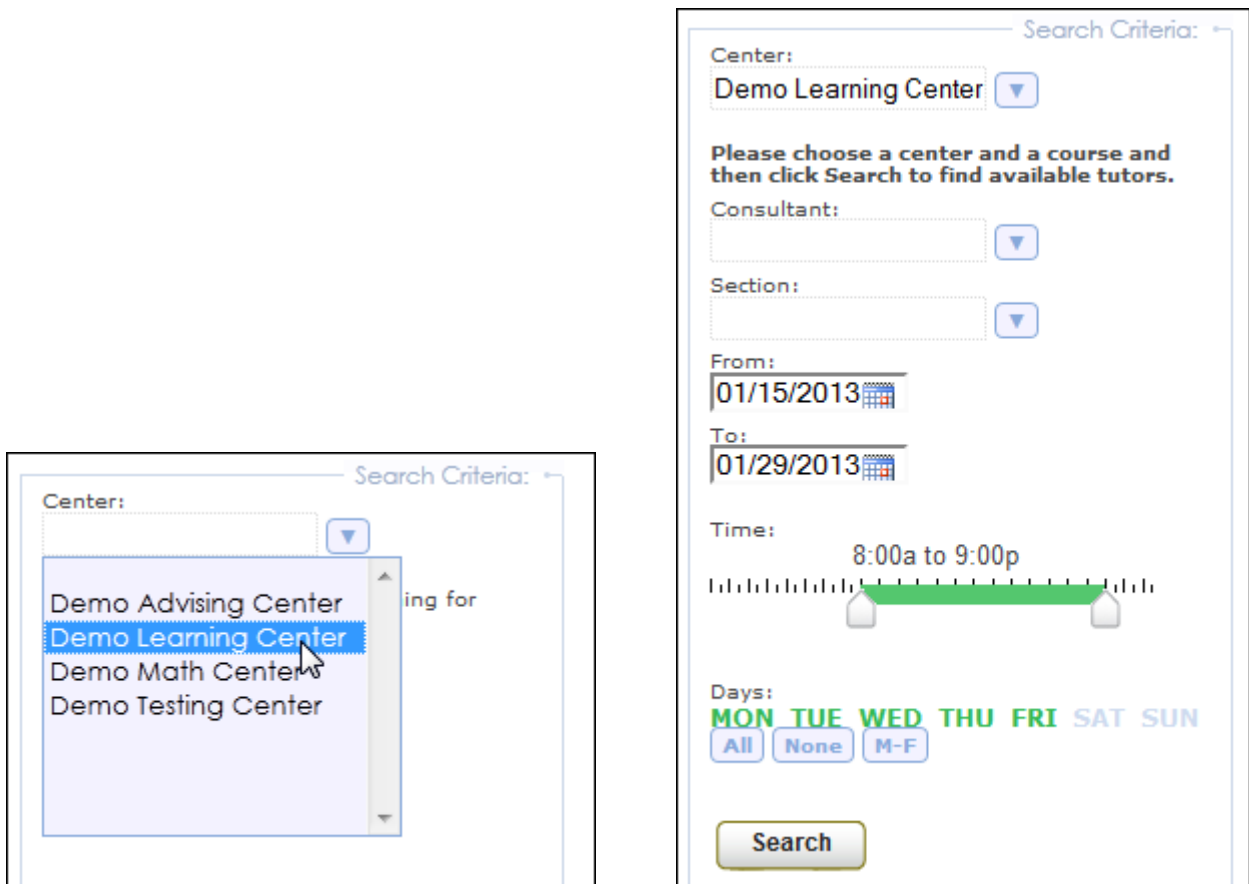
Sam can narrow his search by Consultant, Section, or Date Range, depending on the type of Availability that he is looking for. Let's say for example that Sam was looking for tutoring in his English 101 class on

either Monday or Wednesday around 10:00 am. Clicking on the blue dropdown arrow (▼) next to Section displays a list of Courses that Sam is currently enrolled in (See Chapter 5: Sections - Course Import).

Sam then selects English 101 as his Subject selection. In the time field just below, Sam adjusts the time to 8:00 am to 12:00 pm. In the Days section beneath the Time, Sam deselects TUE, THU, and FRI, to leave only Monday and Wednesday selected.

After modifying the appropriate fields and clicking "Search", the system returns with any matching Availabilities.

If any of the resulting Available Time Slots fits in with Sam's schedule, he can simply click one of the Time Slots to begin the process of booking the Appointment. As an example, let's say our student Sam clicks on the 10:00 AM – 11:00 AM Appointment with Jane Doe on Monday.

Here in the Appointments Entry window, Sam can enter any appropriate information regarding the Appointment: Subject, Reason, Location, a Phone number for Contact purposes, as well as any Notes that may describe what the session will involve. After entering the Appointment information, Sam can click SAVE to book the Appointment. When Sam clicks Save, appointment Confirmations can be sent to both Student Sam Smith and Tutor Jane Doe.

Appointment Configuration Options

Center Profile Scheduling Preferences

The first major area of Configuration Options for Appointments is located in your Center Profile Preferences. Center Profile preferences are global *per* Center Profile, or in other words, the settings put into place here will affect ALL subcenters under the selected Center Profile. All subcenters under a single Center Profile are subject to the rules set for the Center Profile's Preferences.

*To get to your Scheduling Preferences, hover over the Search Glass to the right side of the Trac Navigation bar (top left corner of Main Menu). Select Center Profiles and click your center profile. Select the Prefs Tab to the right. Select the **Scheduling** Tab in the subtabs that load beneath.*

TIME RESTRICTIONS:
(Fields in parenthesis are Default Values)

Schedule no sooner than (7 days) and no later than (24 hours) prior to the Appointment.

This preference defines the Time range in which Appointments are able to be *booked*. The default settings are: Schedule no sooner than (7) days in advance, and no later than (24) hours prior to the appointment.

No cancellations within (24 hours) prior to the Appointment.

This preference defines the Time range in which Appointments are able to be *Cancelled,* previous to the Appointment actually occurring. If this preference was set to, for example, 24:00 hours, students would NOT be able to Cancel an appointment within 24 hours prior to the appointment.

Appointment Duration Minimum:

This preference defines the *minimum* length for ALL appointments, and basically restricts the *minimum* duration of Appointments that you will allow to occur in your Centers.

Appointment Duration Maximum:

This preference defines the *maximum* length for ALL appointments, and basically sets a limit for the *maximum* duration of Appointments that you will allow to occur in your Centers.

Default Appointment Duration

This preference determines the default duration for ALL appointments.

Appt Start in Increments of (00:00)

This preference defines the Increments of time with which you use to measure Appointment duration. If your Centers use schedules based on 10 minute Intervals (1:50, 2:40, etc), for example, we would enter "00:10" to set up the Appointment Start times appropriately. You can use (00:00) to ignore this setting.

Appt End in Increments of (00:00)

This preference defines the Increments of time with which you use to measure Appointment duration. If your Centers use schedules based on 10 minute Intervals (1:50, 2:40, etc), for example, we would enter "00:10" to set up the Appointment Start times appropriately. You can use (00:00) to ignore this setting.

Appt Duration in Increments of (00:00)

This preference defines the Increments of time with which you use to measure Appointment duration. If your Centers use schedules based on 10 minute Intervals (1:50, 2:40, etc), for example, we would enter "00:10" to set up the Appointment Start times appropriately. You can use (00:00) to ignore this setting.

Default Multi-Slot Times: _____ minutes

Multi-Slot Times allow users to book *multiple* appointment slots. For example, if a Consultant was available for 1 hour appointments Monday Afternoon from 1 to 4 pm, a student could be given the option to book all three appointments: the 1:00 appointment, the 2:00 appointment as well as the 3:00 appointment. This preference determines the Default Slot times (for this example 1 hour) of these additional appointments, if the student wants to book multiple appointments.

SPECIAL FIELDS (ON SCHEDULE AND ENTERING APPOINTMENTS)

Reasons: (_) Use Reason Specialties on Search Avail

Activating this preference will display the Reason field in the Search Availability Window. When searching for an Availability, the user who is performing the search has the option of entering a Reason to limit the search. If the activation of this preference is desirable, make sure that during the process of setting up Availabilities, Reason is defined (*See Chapter 6: Reasons - Reason Specialties*).

Show on Schedule

Activating this preference will display Reason Specialties on the Schedule: specifically next to the Time field on the Availability itself.

Enter in Avail

Activating this preference will allow Reason to be entered while creating Availabilities. Reason will be displayed in the Availability Entry Window.

Enter in Appt

Activating this preference will display the Reason Specialties on the Appointment Entry Window (when booking Appointments)

(_) Required

Activating this preference will force users to specify Reason Specialties during their search. A search will not be able to be performed without entering a Reason Specialty.

Locations: (_)

Activating this preference will display the Location field in the Search Availability Window. When searching for an Availability, the user who is performing the search has the option of entering a Location to limit the search. If the activation of this preference is desirable, make sure that during the process of setting up Availabilities, Location is defined (*See Chapter 9: Availabilities – Availability Entry Options*).

Show on Schedule

Activating this preference will display Location on the Schedule. When you hover your mouse cursor over an Availability, Location will display.

(_) Enter in Avail

Activating this preference will display Location in the Availability Entry Window (when setting up Availabilities).

(_) as Text

Activating this preference allows users to, instead of selecting from a Pre-defined list of Locations, enter in Custom Locations as Text. Rather than clicking the Dropdown menu next to Locations and making a selection, users can simply click in the field and Type a Location name (i.e. Room 101).

(_) Enter in Appt

Activating this preference will display the Location Specialties on the Appointment Entry Window (when booking Appointments).

(_) Required

Activating this preference will force users to specify Location during their search. A search will not be able to be performed without entering a Location.

Sections: (_)

Activating this preference will display the Section field in the Search Availability Window. When searching for an Availability, the user who is performing the search has the option of entering a Section to limit the search. If the activation of this preference is desirable, make sure that during the process of setting up Availabilities, Section is defined (*See Chapter 5: Section - Section Specialties*).

(_) Show on Schedule

Activating this preference will display Subject/Section on the Schedule: specifically next to the Time field on the Availability itself.

(_) Enter in Avail

Activating this preference will display Subject/Section in the Availability Entry Window (when setting up Availabilities).

(_) Enter in Appt

Activating this preference will display the Subject dropdown menu on the Appointment Entry Window (when booking Appointments)

(_) Required

Activating this preference will force users to specify a Section during their search. A search will not be able to be performed without entering a Section.

OTHER SCHEDULE OPTIONS:

Allow Student to Cancel Appts

This preference, when activated, allows students to Cancel Appointments. When logged in as a Student, any upcoming Appointments will appear in the Welcome Window in the Center of your Main Menu. These appointments can be cancelled simply by clicking on the "X" to the right of the Appointment.

Display Consultant Email

This preference, when activated, displays the Consultant's email address for Students' reference. The Consultants' email address will be displayed next to their Name in the Search for Availability Results.

Check Student Conflict on Save Appointment

This preference, when activated, will check for any Scheduling Conflicts when students book an Appointment. If a student has another appointment (in any center) at the same allotted time slot, the system will prevent the student from double-booking.

Display Consultant Alias on Availability Search

This preference, if activated, will display Consultant Alias on the Search for Availability Window. Consultant Alias is typically used if a Consultant does not want to display their Full Name, and instead uses an Alias for identification.

Display Notes on Appointment Entry, Students may (_____)

This preference, if activated, will display any Appointment Notes in the Appointments Entry window. Furthermore, Students may:

Edit

The "Edit" option will allow students to Edit and modify any notes entered.

View

The "View" option will only allow students to View Appointment Notes.

Hide

The "Hide" option will hide any Appointment Notes from the student.

Display Consultant Phone on Appointment Entry

This preference, if activated, displays the Consultant's phone number in the Appointment Entry Window. The Consultants' phone number will also be displayed next to their Name in the Search for Availability Results.

Allow User to Enter Visit Notes on Group Roster

Activating this preference allows Users to enter Visit Notes on Group Rosters for Group Appointments. Attendance can be taken for Multi-person / Group Appointments directly from the Schedule, and as students are marked as Attended or Cancelled, Visit records are created or not created appropriately. If Students are marked as Attended and a Visit Record is created, this preference allows for Users to enter Visit Notes for the Visit Record.

Allow User to Enter Send Emails on Group Roster

Activating this preference allows Users to be able to send emails on Group Rosters for Group Appointments. Attendance can be taken for Multi-person / Group Appointments directly from the Schedule, and as students are marked as Attended or Cancelled, Visit records are created or not created appropriately. If Students are marked as Attended and a Visit Record is created, this preference allows for Users to Send Emails directly from the Schedule through the Group Roster.

Block Students from Booking Recurring Appointments

This preference, if activated, will block students from booking Recurring Appointments (Daily, Weekly, Monthly). This is not to be confused with the Multi-Slot function, which will still be available for users to book multiple time slots within the same Availability.

<div align="center">APPOINTMENT CUSTOM FIELD:</div>

Display Custom Field on Appointment Entry

Appt Custom Field Label

These preferences allow you to place a Custom Field in the Appointments Entry window. This custom field will appear when the Appointment is being booked, along with the Subject, Reason, Location, Fund, and Status fields (if you so choose). The default Custom Field is set to (Phone) and allows Users to enter their Phone number into the Appointment Record as the appointment is being booked.

Custom Field Required

This preference forces the Custom Field of your choice to be REQUIRED in order to "Save" or book the Appointment.

Appointment Instructions

You can enter in this field any appropriate Instructions for users who are booking appointments. These customized instructions will appear on the Appointments Entry Window, just above the Center Selection Field.

Custom Choices

You can define in this field the Choices available for the first preference in this Section: **Appt Custom Field Label**. Any choices that you enter in this field must be separated by a Return (Enter) character, and will appear in the Appointment Entry Window when a user is booking an Appointment.

Display Fund on Appointment Entry

This preference will Display the Fund field that appears in the Appointment Entry Window.

Required

This preference will force the Fund field to be completed in order to "Save" or book the Appointment.

APPOINTMENT STATUS & MANAGEMENT:

Appointment Status Choices (_____)

The Appointment Status Choices Field is an area where we can define our Appointment Status Choices. Here we can designate an unlimited amount of Status types, to accurately classify and process the data of Appointments that occurred. Typical Appointment Statuses include: Attended, Missed, Tutor-Cancelled, Student-Cancelled, or even Student-Missed, Tutor-Missed, Admin Cancelled, Student Cancelled, etc…Make sure to separate each classification with a Return or Enter character.

Status for Attended (_____)

The Status for Attended field allows a user to rename one of the two most important statuses that need to be defined in the system: Attended and Missed. The desired name should be entered in the text field, and also should be included in the preference #1 above: Appointment Status Choices.

Status for Missed (_____)

The Status for Missed field allows a user to rename the second most important status: Missed. The desired name should be entered in the text field, and also should be included in the preference #1 above: Appointment Status Choices.

Missed Appointments, Change Status to (_____) automatically each night

This preference involves the Automated Event "Missed Appts" mentioned in the Intro / Definitions section. To briefly summarize, the "Missed Appts" automated event basically checks all Visits that have occurred within a time period, and attempts to link these Visits to the correct Appointments. If an appointment, let's say was set to occur at 12:00 pm on Monday, and the student who booked the appointment logs in at 11:45 am, and signs out at 01:15 pm. Later that night, the "Missed Appts" automated event runs and sees that our student made a visit for an hour and a half. The system also recognizes that the time frame matches that of the Appointment (to a degree of tolerance that you set, i.e. +/- 15 minutes), and therefore successfully matches the Visit to the Appointment, and marks the Appointment status as Attended.

On the other hand, let's say our student does not show up for the Appointment. In this case, the system recognizes that there was no Visit made on Monday by said student. Consequently, the system does NOT link the Visit to the Appointment, as no visit occurred. This preference then comes into play, as the system will then modify the Appointment Status to whatever Status you define here, for example, "NO Call NO Show", if the status of "missed" is insufficient or you want to further define/classify the status of an Appointment.

Student Max Missed (_____) appts, since (_____)

Change Center Student Status to (_____)

The Student Max Missed Preference determines exactly how many Appointments a student can miss, and if so, what happens to the student's Status as a result? For instance, let's say we set a limit at 3 max Appointments missed within a Semester's date range. Let's also say if such a situation were to happen, we would then change the students' status to BANNED. In this case, if a student were to miss 3 appointments within a semester and subsequently attempted to book another Appointment, the system would return with a message indicating the students current status of BANNED, and the reason (missing 3 appointments).

Appointment Fund Choices (_____)

The Appointment Fund Choices Field is an area where we can define the different classifications of Funds. Here we can designate an unlimited amount of Fund types. Make sure to separate each classification with a Return or Enter character.

Appointment Location Choices (_____)

The Appointment Location Choices Field is an area where we can define Locations within Appointments. Location is typically used to further designate a location within a Subcenter – for instance, Writing Center: Location – Room 103. Make sure to separate each classification with a Return or Enter character.

OTHER SCHEDULING BLOCKS:

The "Other Scheduling Blocks" section allows a campus to devise Rules regarding Scheduling. The following parameters will PREVENT a student from booking an appointment, if certain rules are broken.

Prevent a student from booking an appointment if any of the following is true:

Maximum of (__) Appts with Status = (_____) from (_____) to (_____)

This preference (similar to Preference #4 under Appointment Status & Management above) allows a campus to create a Scheduling Block based off of any Appointment Status. If, for instance, your campus has created an Appointment Status of "Student Cancelled", and you would like to prevent students who have Cancelled 3 appointments from booking any further appointments, we could set a maximum limit at 3 Appointments with a status of "Student Cancelled" for this semester.

Maximum of (__) Appts with Status = (_____) from (_____) to (_____)

This preference is the exact same as Preference #1 above, and is available to set a rule involving a different Appointment Status.

Prevent booking when Student Status is (_____)

This preference will simply prevent a student from booking if said student's status is _____. To use an example from earlier, if a student status is BANNED from missing 3 appointments, and this preference has been set to BANNED, said student will not be able to book appointments for the remainder of the time period that you defined.

Prevent booking for more than (_____) consecutive appointments Same Consultant, (_) for the same student

This preference, if activated, will prevent a user from booking consecutive appointments with the SAME Consultant, OR for the SAME Student.

SEARCH AVAILABILITIES:

Center Description/Instruction on search

The Center Description/Instruction on search field allows a user to enter Custom Instructions on the

Search for Availability Window. HTML tags are acceptable in this area. Click on the ◿ icon on the bottom right corner of the text box to expand the field.

Instructions when no Availabilities Found

The Instructions when no Availabilities Found field allows a user to enter Custom Instructions in the Search for Availability Window, when no results have been found. HTML tags are acceptable in this area. Click on the ⌟ icon on the bottom right corner of the text box to expand the field.

Instructions when no availabilities found:	Sorry, there were no availabilities found. Please email support@go-redrock.com if you need assistance scheduling an appointment.

Key: [drop in] [1 on 1] [multi-person class or group] move the mouse over an availability to view the location and other instructions.

Available Time Slots:

Testing the HTML on the AvailResults.
Testing the script on availresults.

Your account has overrides, allowing you to override any scheduling restrictions.

No results found.
Sorry, there were no availabilities found. Please email support@go-redrock.com if you need assistance scheduling an appointment.

Show Consultant Choice on Search, if not, use (_____)

Activating this preference will allow Users to Choose a Consultant when Searching for an Availability. The text field to the right of the word "use" has the ability to define a couple of options. If left blank, ALL consultants will be available in selection. A specific Consultant name can be typed here to display a SINGLE Consultant. Entering in the phrase "CHOICE REQUIRED" will force Users to select a Consultant before a search can be performed.

Consultant Choices Script (_____)

Allows for customizations of Consultant choices. Contact Redrock Support for details (support@go-redrock.com)

Show Reason on Search, if not, use (_____)

Activating this preference will allow Users to Choose a Reason when Searching for an Availability. The text field to the right of the word "use" has the ability to define a couple of options. If left blank, ALL Reasons will be available in selection. A specific Reason can be typed here to display a SINGLE Reason. Entering in the phrase "CHOICE REQUIRED" will force Users to select a Reason before a search can be performed. If the Reason choice is required, make sure to define Reasons when creating Availabilities and Appointments.

Reason Choices Script (_____)

Allows for customizations of Reason choices. Contact Redrock Support for details (support@go-redrock.com)

Show Section on Search, if not, use (_____)

Activating this preference will allow Users to Choose a Subject/Section when Searching for an Availability. The text field to the right of the word "use" has the ability to define a couple of options.

If left blank, ALL Subjects will be available in selection. A specific Subject can be typed here to display a SINGLE Subject/Section. Entering in the phrase "CHOICE REQUIRED" will force Users to choose a Subject before the search can be performed. If the Subject choice is required, make sure to define Subjects when creating Availabilities and Appointments.

Show Location on Search, if not, use (_____)

Activating this preference will allow Users to Choose a Location when Searching for an Availability. The text field to the right of the word "use" has the ability to define a couple of options. If left blank, ALL Locations will be available in selection. A specific Location can be typed here to display a SINGLE Location. Entering in the phrase "CHOICE REQUIRED" will force Users to select a Location before a search can be performed. If the Location choice is required, make sure to define Locations when creating Availabilities and Appointments.

Allow Dates on Search, Default from (__) to (__) days

The Allow Dates on Search preference allows a user to enter a Date Range during a Search for Availability. The Default values field will define the values that automatically populate when the Search for Availability page first loads (i.e. 0 to 14 days).

Allow Days on Search, default: (MONTUEWEDTHUFRI)

The Allow Days on Search preference allows a user to specify Days of the Week during a Search for Availability. The Default values field will define the values that automatically populate when the Search for Availability page first loads.

Allow Times on Search, Default from (_____) to (_____)

The Allow Times on Search field allows a user to define a Time Range during a Search for Availability. The Default values field will define the values that automatically populate when the Search for Availability page loads (i.e. 08:00 to 21:00).

When searching, all users will find:

Drop-ins (_)   Multi's (class/group) (_) 1 on 1's (_)

This preference can limit Users Search for Availability to only the Availability Types that you define. Keep in mind though, that this applies to Center Profiles (global to all Subcenters) and not individual Subcenters. So for instance, if all of your Subcenters under 1 Center Profile did NOT do drop-in availabilities (only appointments), we can uncheck the Drop-ins checkbox for this preference, and these types of availabilities will not appear in the Results of the Search for Availability.

When searching, all students will find:

Drop-ins (_)   Multi's (class/group) (_) 1 on 1's (_)

This preference can limit STUDENTS' Search for Availability to only the Availability Types that you define. Keep in mind though, that this applies to Center Profiles (global to all Subcenters) and not individual Subcenters. So for instance, if all of your Subcenters under 1 Center Profile did NOT do drop-in availabilities (only appointments), we can uncheck the Drop-ins checkbox for this preference, and these types of availabilities will not appear in the Results of the Search for Availability for the STUDENTS group.

Show Consultant Location on Availability Results

This preference if activated will display Consultant Location on Availability Results.

Show Consultant Classification on Availability Results

This preference if activated will display Consultant Classification on Availability Results. Consultant Classification is typically used to classify or differentiate Groups of Consultants, for instance, Professional Tutors, Student Tutors, or Assigned Advisors etc..

Appointment Configuration Options

Group Access Scheduling Preferences

The second major area of Configuration Options for Appointments is located in your Group Access Preferences. Group Access settings determine which Groups of Users are able to Access the Schedule. The Group Access Preferences define in detail specific levels of access.

To get to your Group Access Settings, hover over the Search Glass on the right side of your Trac Navigation bar (top left corner on Main Menu). Select Center Profiles and click on your Center Profile. Select the Group Access tab.
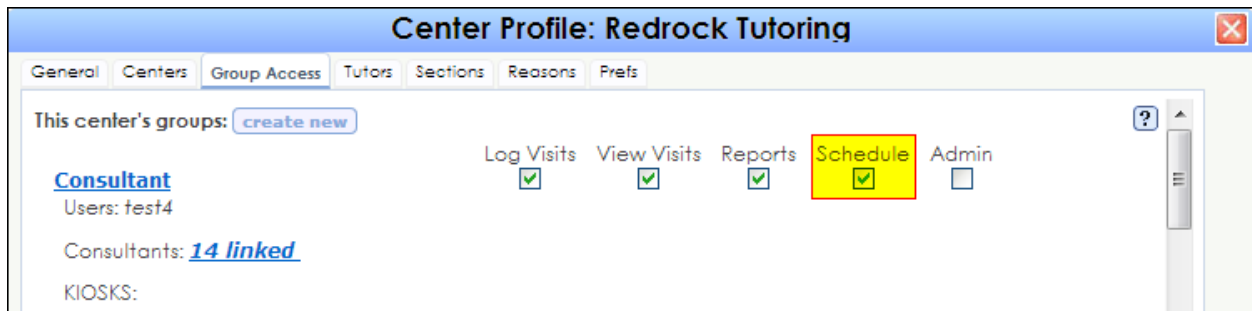
To add access to the Schedule for a particular Group, check the box next to Schedule for the chosen Group. The "Schedule" Function determines whether or not this group has the ability to view the Schedule. Click on the Group Name to access the individual Group's settings. For this example, we've used the Consultant Group.

Allow User to Access Schedule

Activating this preference gives the selected Group of Users the ability to Access the Schedule.

Allow User to Create Appointments not linked to Availabilities

Activating this preference allows the selected Group of Users to create appointments that are NOT linked to Availabilities. Typically Appointments must be drawn from an availability, however this preference will Override this rule.

Allow 'move to' functionality in appointment entry

Activating this preference allows the selected Group of Users to Move appointments by using the "move to" function in the Appointment Entry window. The "move to" function allows a User to quickly assign the Appointment slot to another Consultant by performing a live search for availabilities. If an availability that matches the criteria entered is found, the Appointment's assigned Consultant can be quickly switched by clicking on the blue "Change" icon after a Consultant has been selected.

Allow 'move to' for moving to other consultants in same center

Activating this preference allows the selected Group of Users to use the "move to" function to move Appointments to Consultants in the SAME center.

Show Consultant Classification on Day Schedule

Activating this preference will display for the selected Group of Users the Classification of Consultants on the Schedule. Classification can be used to further categorize the Consultant Group and classify Consultants by different types. Typical Classifications used are Student Tutors, Assigned Advisors, or Professional Consultants.

Show Consultant Location on Day Schedule

Activating this preference will display Consultants' Locations for the selected Group of Users on the Schedule. Location can be used to further designate a Classroom, Office, any type of Room that exists within your Subcenter(s). Consultants may enter a Location in their Consultant profile to indicate a central location or a common meeting area.

Allow User to View Student Phone on Schedule (Phone1)

Activating this preference will display for the selected Group of Users Student Phone numbers directly on the Schedule.

If you hover your mouse over an existing Appointment:
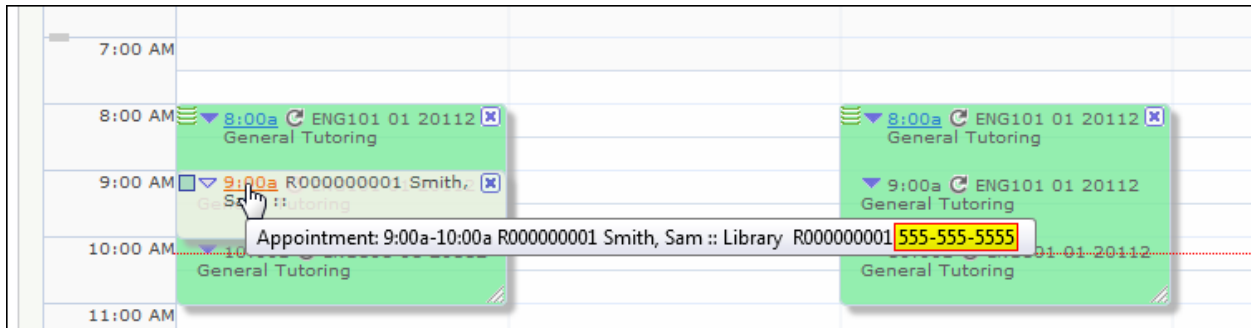
In the Appointment Entry window:

Allow User to View Student Email on Schedule

Activating this preference will display for the selected Group of Users Student Email Addresses directly on the Schedule.

If you hover your mouse over an existing Appointment:

In the Appointment Entry window:

Appointment Status

Appointment Statuses can be defined in your Center Profile *Prefs Tab* (See Appointment Status & Management section above) and fully customized to include any status that your campus deems as necessary. The three major default statuses for Appointments are Attended, Missed, and Cancelled. However, campuses commonly add additional statuses to further differentiate or associate meaning. For example: Student Missed, Tutor Missed, Student Cancelled, Tutor Cancelled, or No Call No Show (NCNS).

Appointment records can be processed in several different areas within your Trac system. As an Administrator, Front Desk Worker, or Consultant with the appropriate privileges, we can access the Schedule (*TracMan > Schedule*). We can then process Appointment records based on Consultant selection. Click on a Consultant's name in the Personnel List to bring up their weekly Schedule.
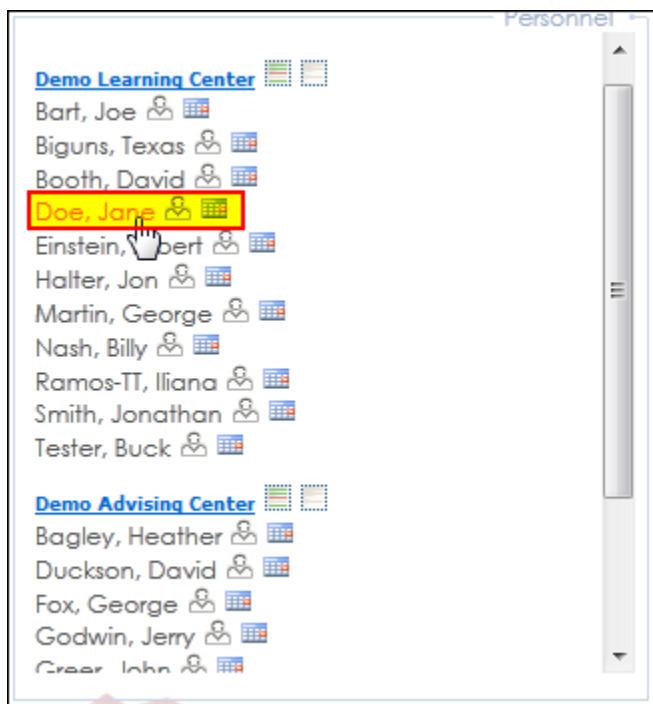
Click on the time slot of an Appointment that displays as a blue hyperlink to open that Appointment record.
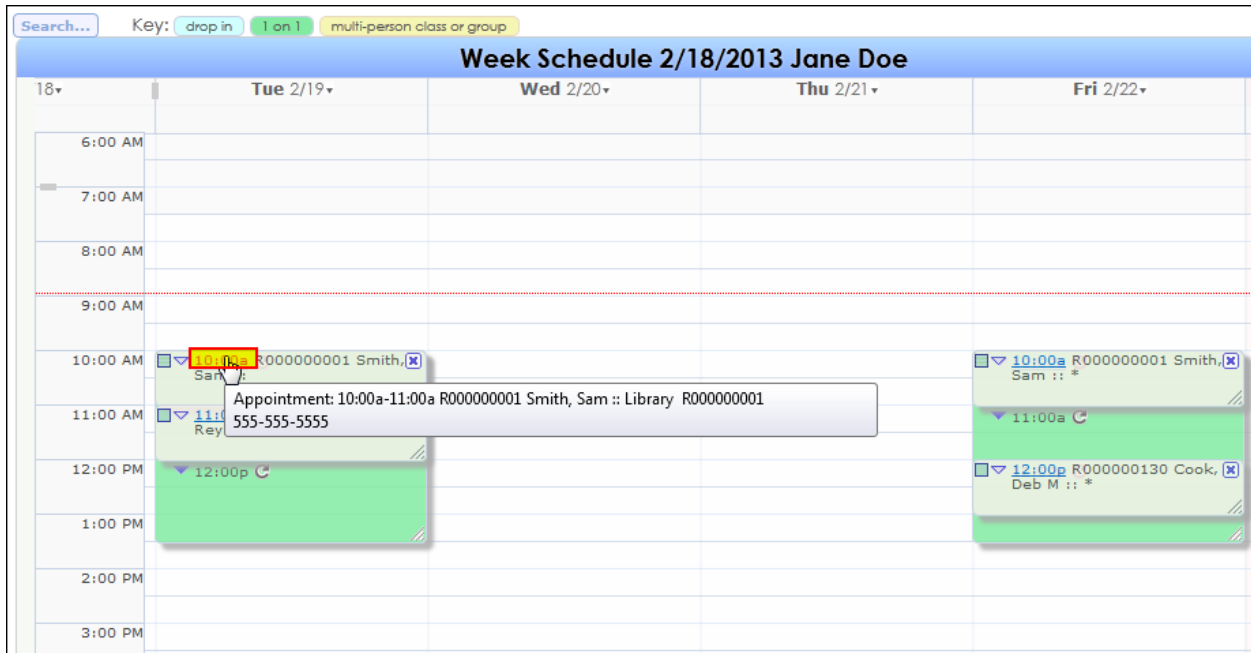
In the Appointment Entry window, we are able to modify the Status of the Appointment, or any other field (if given sufficient privileges). As a Consultant, the fields that are usually the most important are the Status and Notes fields.

Click *Save* to Save the Appointment Record.

As a Consultant, Appointment records can also be accessed through the *Schedule Tab* in the Center of your Main Menu.

Appointment records can also be accessed through the Student Record (with appropriate privileges). Student Records can be accessed from the Student Listings *(Search Glass > Students)* through a Search. If you are searching for one student, a convenient method of searching can be to simply type the last name (comma separated) and first name or ID number in the Trac Navigation bar in the upper left corner, and select the student record as it appears below.
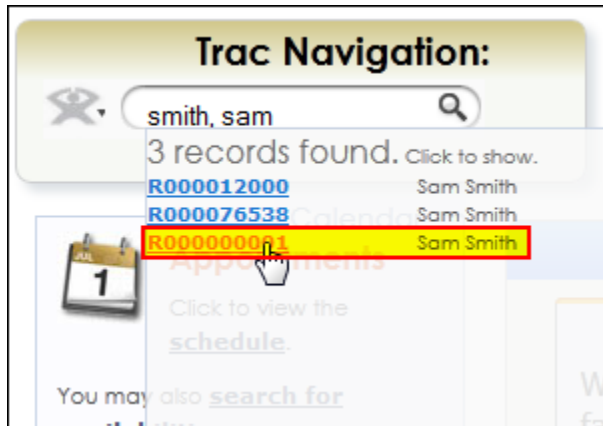
From the student record, select the History Tab and navigate to the Appointments subtab.
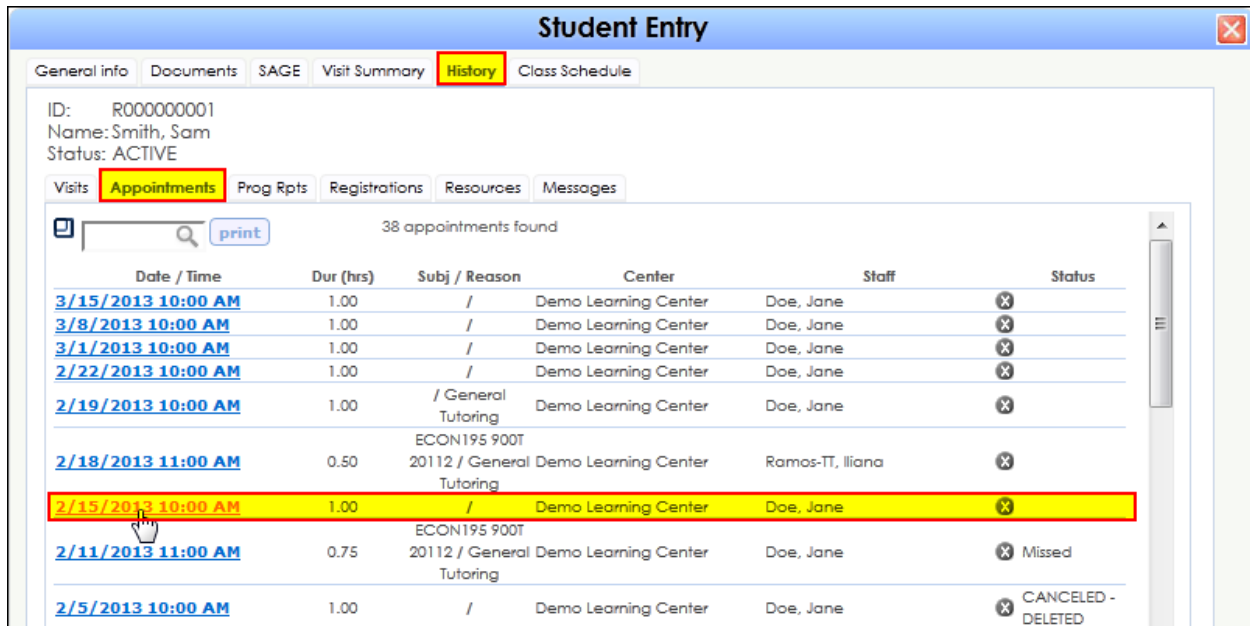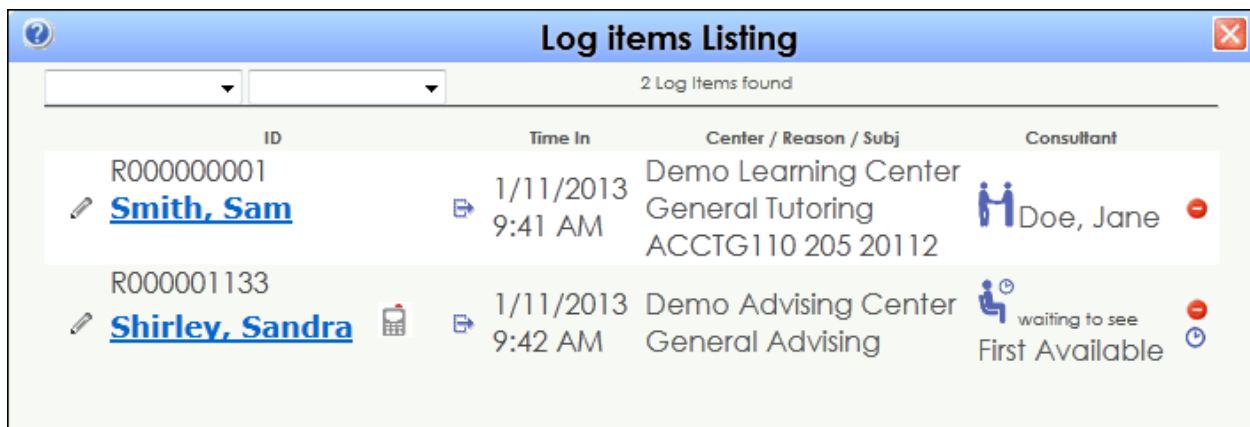
Chapter 11: Visit Records

Recording visits is essential to providing accurate data of the students that have utilized services offered. Visit Data can be collected a variety of ways: Logging students in and out, through Quick Visits, through Batch Visits, and through Appointments.

Recording visits through: The Log Listing

The Log Listing is an electronic form of a sign in sheet and simply displays the students currently logged in to your Centers. The Log Listing is only shown to users or consultants with the privileges to view this information. These screenshots represent the view of a user that has sufficient privileges to see this information.

To get to the Log Listing, click on the TracMan Icon on the left side of the Trac Navigation. Click Log Listing to access the electronic sign in sheet.

Students sign in when they arrive and sign out when they leave. This allows you to track when and where students are visiting, for how long, and for what reasons.

How to log students in and out

The Log Listing allows users to enter a form of student identification in the *Log Student* window at the top of the page. This may be a numeric Student ID, Barcode, Username, or Full Name (entered Last, First). Enter the student identification and press the *Enter/Return* key on your keyboard. Students may even scan the barcodes or swipe the magnetic strip on their Student IDs to log in.

When the Trac system finds your student, they will be asked to select a center. The student can select the appropriate center and click *Log In*. If only one center choice is available, your Trac system will automatically make the choice and move on to the next screen.

Now typically the student will be asked to select a Subject and a Reason for their visit. The Subject and Reason choices are collected from the Sections and Reasons set up in your Profile. You can find

instructions on setting up your Sections and your Reasons in the *Set Up Sections* and the *Set Up Reasons* sections in this guide. The student will select from the available Sections and Reasons and click *Continue*.
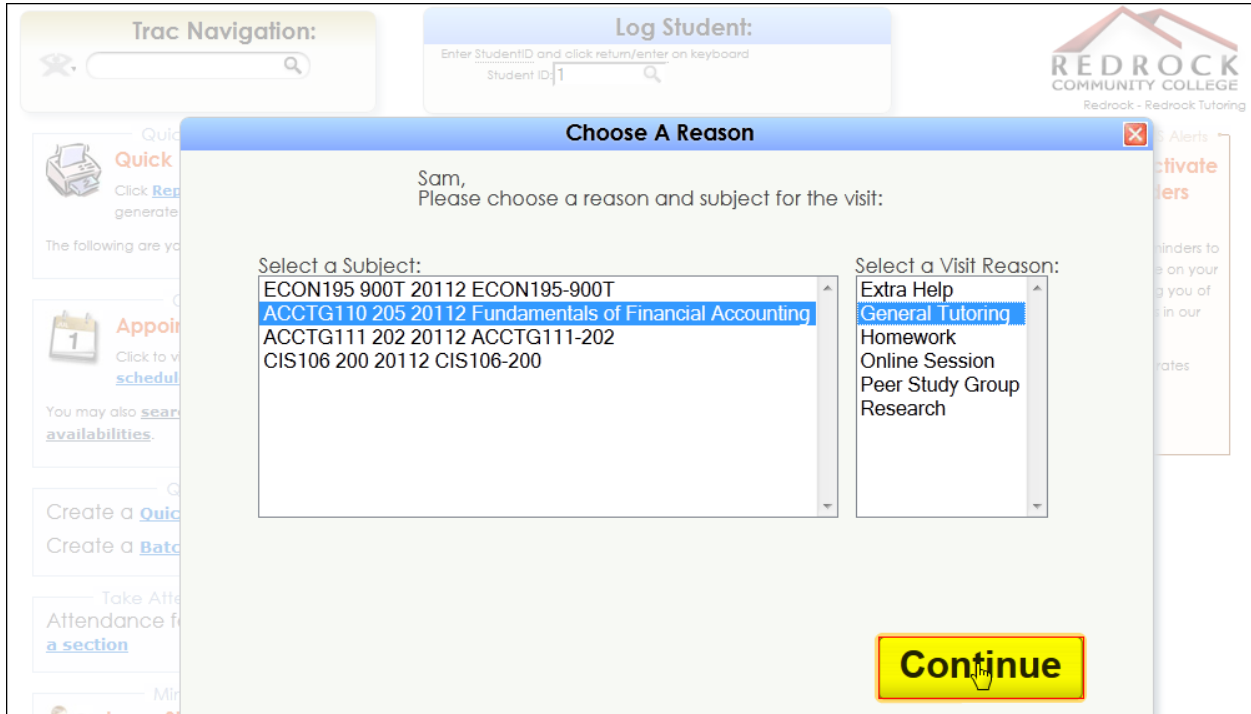
Alternatively for AdvisorTrac, Subject choice can be replaced with Consultant Choice, or more specifically a dropdown Menu with a list of Advisors available at your Center. Students who log in will then select an Advisor as well as a Reason for their visit.
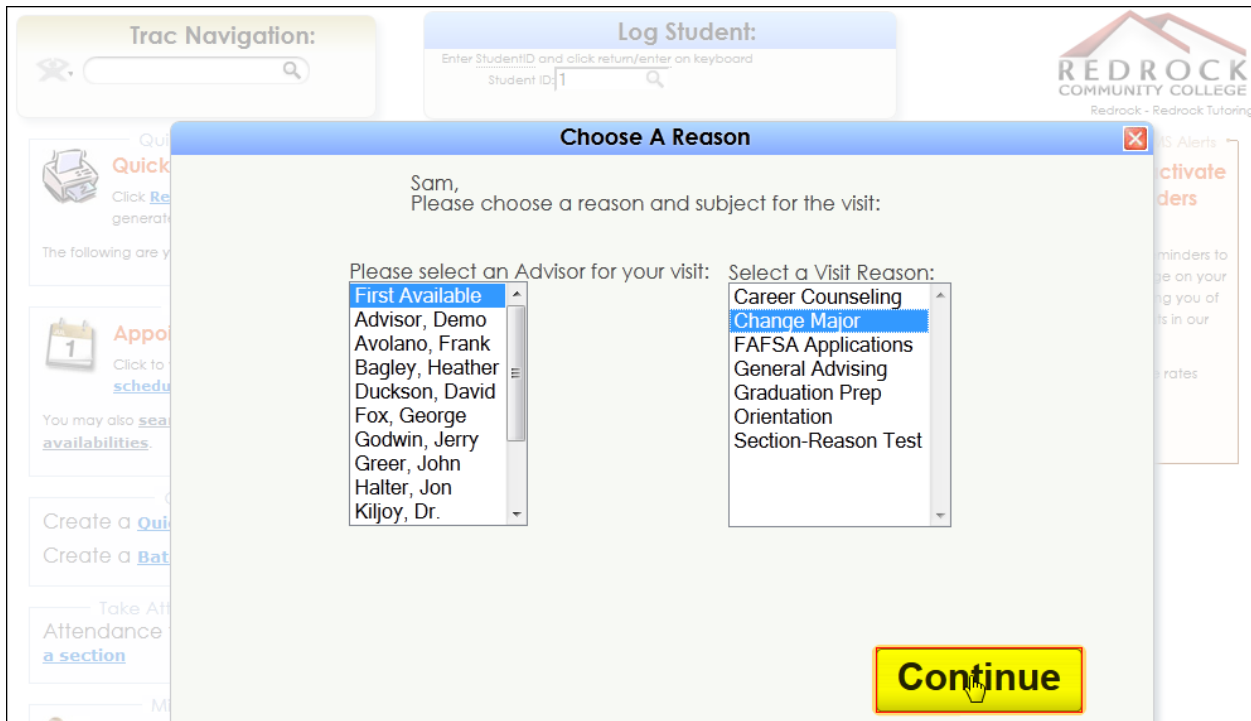
The Log Listing now shows the student that is currently signed in for a visit.
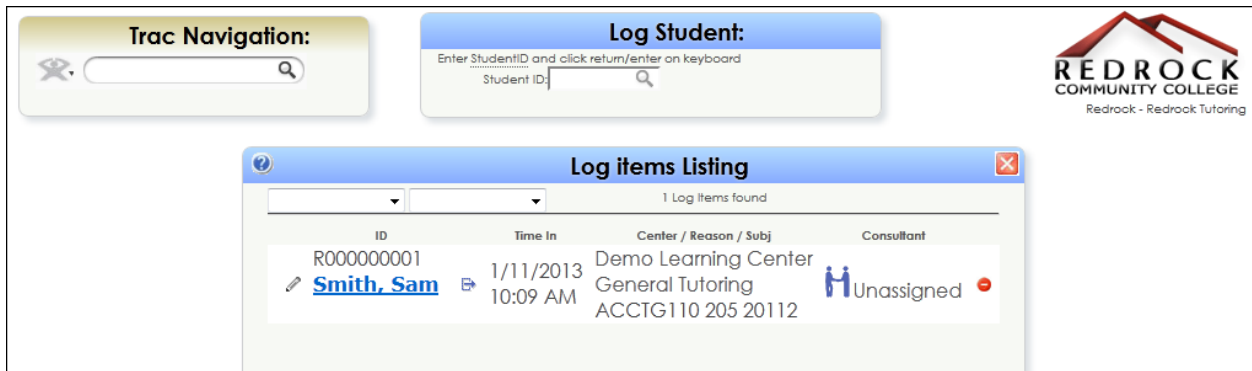
For AdvisorTrac:
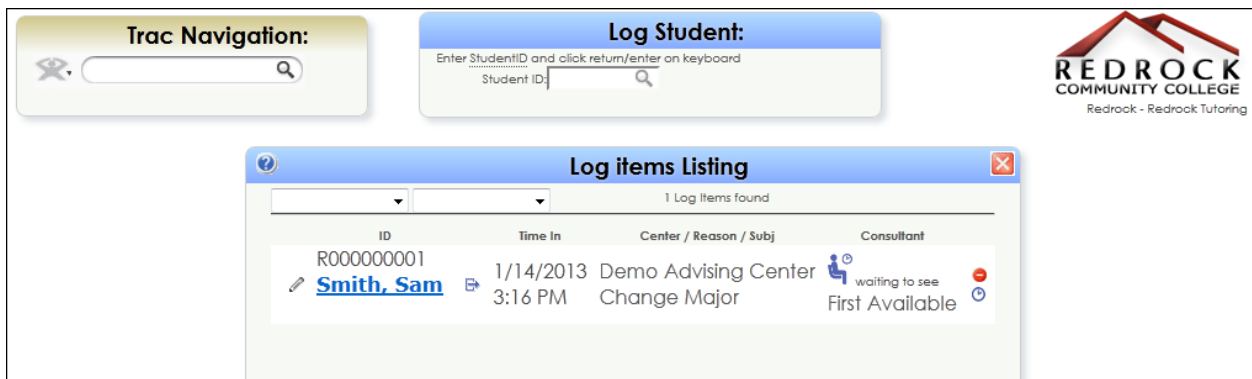
The Log Listing for AdvisorTrac contains an icon unique to AdvisorTrac. AdvisorTrac utilizes the "Waiting Room" function, which allows Centers to collect Wait Time as well as actual Visit time. The distinction can be made directly on the Log Listing by clicking on the icon of the person watching the clock.
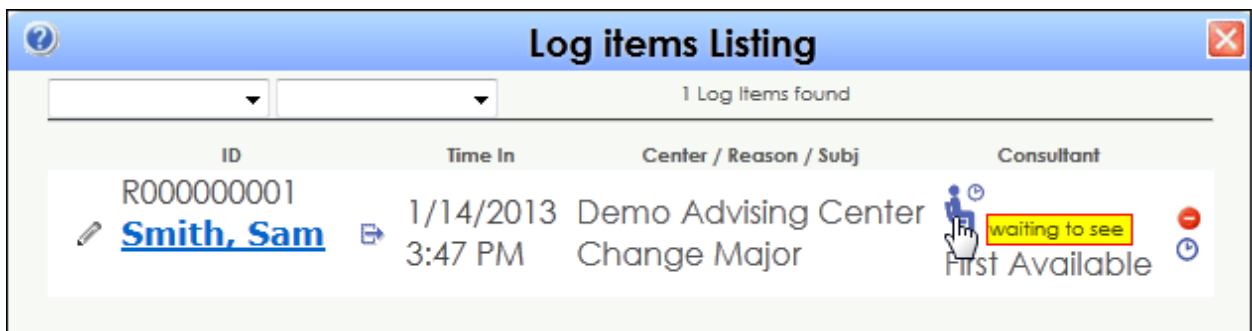
Clicking on this icon will proceed to change the "waiting to see" message to a "being seen by" message, indicating the transition from Wait Time to actual Visit Time.
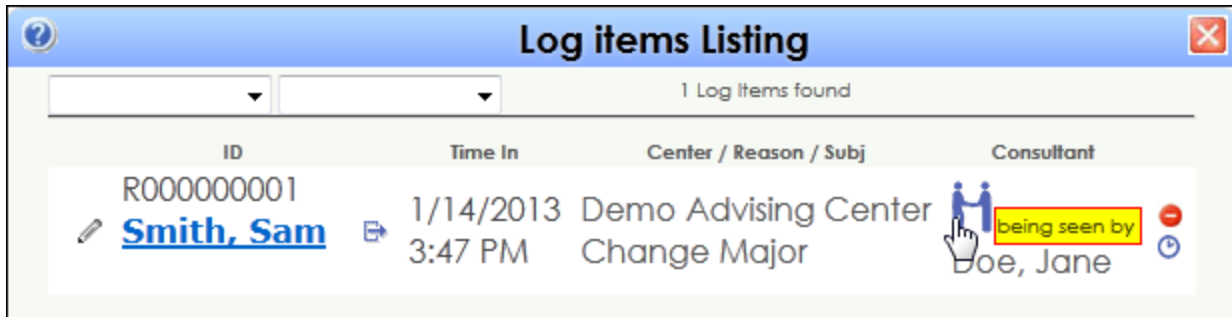
When the student has completed their visit, they need to sign out to end their session. You have several options available to sign the student to sign out of the visit. You can re-enter a numeric Student ID, Barcode, Username, Full Name (entered Last, First) in the Log Student window, or use a Barcode Scanner to populate the field. There are also several icons on the Log Listing that will begin the Logout process.
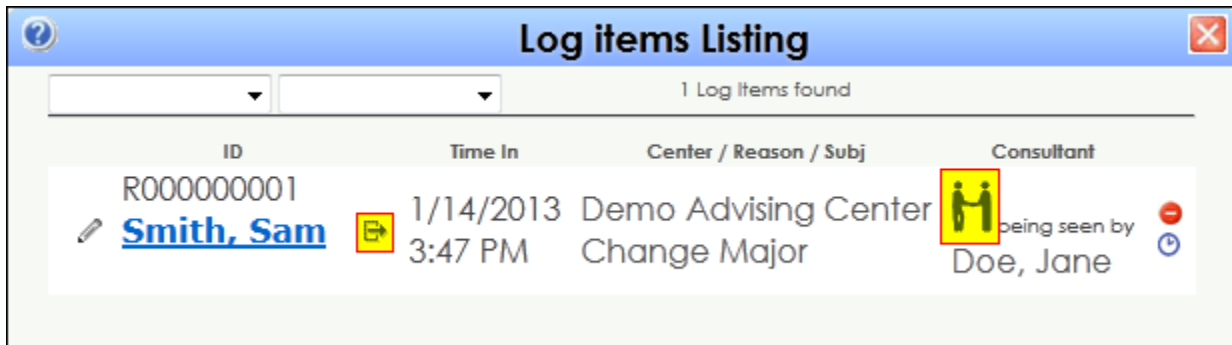
You can begin the Logout process by clicking on the *Exit* icon   or the image of student and

consultant shaking hands   .

Any of these options will direct a user towards the Visit Entry window. The Visit Entry window that appears during the Logout process may contain Custom Questions used for obtaining additional feedback about a session. Consultants or Students may enter Visit Notes here as well.

Visits Entry

How was your visit? Great ▾
Would you come back for more tutoring? Yes ▾
Would you recommend us to a friend? Yes ▾

Visit Notes:
Enter Visit Notes here

Continue

In AdvisorTrac, Advisors typically enter notes

Visits Entry

Please enter the note regarding the visit with Sam Smith

Visit Notes:

What Counselor did you see: ▾

Continue

Recording Visits Through: Quick Visits

Quick visits are typically used for decentralized visits, or in other words, when Visits occur outside of your Centers. In these instances, Students and/or Consultants are not able to login/logout at the time of the Appointment or Visit, and data must be entered into the system after the session has occurred.

QUICK VISIT: CONFIGURATION OPTIONS
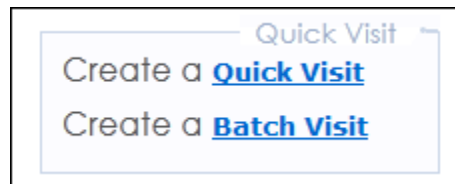
To add the Quick Visit Utility to your Main Menu, go to your MyPrefs: (TracNav > TracMan > MyPrefs), and select Quick Visit.

To add access to the Quick Visit Utility for a particular Group, go to your Group Access: (TracNav > Search Glass > Center Profile > Group Access) and simply check the box next to Log Visits To for the chosen Group. The "Log Visits To" Function determines whether or not this group has the ability to Log students in and out, and included in this function is the Quick Visit Utility.

Creating a Quick Visit: User Info

From your Main Menu, click on "Create a Quick Visit" on the left hand side underneath the Appointments Link.

The first tab selected upon clicking the "Quick Visit Link" will be the Visit Info Tab. Here in the Visit Info tab, you can add the appropriate data for the session that occurred. Fill in the student ID number, Date, Location (if necessary), Center, Reason, Subject, Time in/Time Out, Consultant, and any Visit Notes that may apply.

Recording Visits Through: Batch Visits

The Batch Visit Utility can be used to enter Visit data for Group or Multi-person Visits.

BATCH VISIT: CONFIGURATION OPTIONS
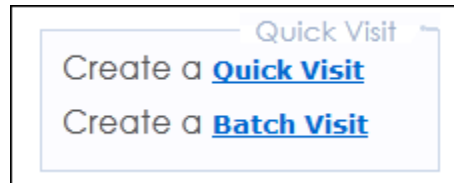
To add the Batch Visit Utility to your Main Menu, go to your MyPrefs: (TracNav > TracMan > MyPrefs), and select Quick Visit. The Batch Visit Utility will be located on the left hand side of your Main Menu just underneath Appointments and the Quick Visit Utility.

To add access to the Batch Visit Utility for a particular Group, go to your Group Access: (TracNav > Search Glass > Center Profile > Group Access) and first check the box next to Log Visits To for the chosen Group. The "Log Visits To" Function determines whether or not this group has the ability to Log students in and out, and included in this function is the Quick/Batch Visit Utility.

Additionally, there are three preferences that we also recommend activating under the "Log In/Out" Tab in your Group Access preferences. These preferences control access to additional options for your Batch Entry Utility.

Show SI Batch Entry Option

The SI Batch Entry option allows a user to conveniently pull student ID numbers from Course Enrollment in order to mark attendance. The SI Batch Utility is typically used for Group appointments such as SI sessions, Exam reviews, and Orientations, etc…, and allows a User to draw Attendance by Subject or Section. For example, if a Consultant hosts a Math 110 Exam Review for a specific section, the Consultant can conveniently draw the student listing for the Math 110 section (i.e. Math 110 – 11370) and mark attendance by simply checking the checkboxes next to the attending student's name.

Show Visit Batch Entry Option
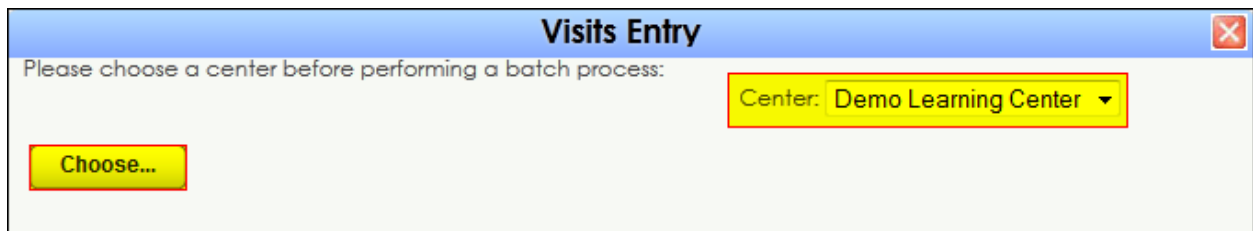
The Visit Batch Entry allows a user to pull student ID numbers based off of a search. After performing any search (Search, Utility Search, Power Search) in the Student Listing (TracNav > Magnifying Glass > Students > List Options), the Visit Batch Entry will mark the "Selection" attended, based off of the search the user performed.

Show Visit Scans Batch Import

The Visit Scans Batch Import allows a user to export data from a Card reader. This data could include student ID's, Visit Time, Location, etc…(contact Redrock support for more details support@go-redrock.com)

Creating a Batch Visit: User Info

From your Main Menu, click on "*Create a Batch Visit*" on the left hand side, underneath the Appointments Link. When you click on "Create a Batch Visit", the system will first prompt you to Choose a Center:
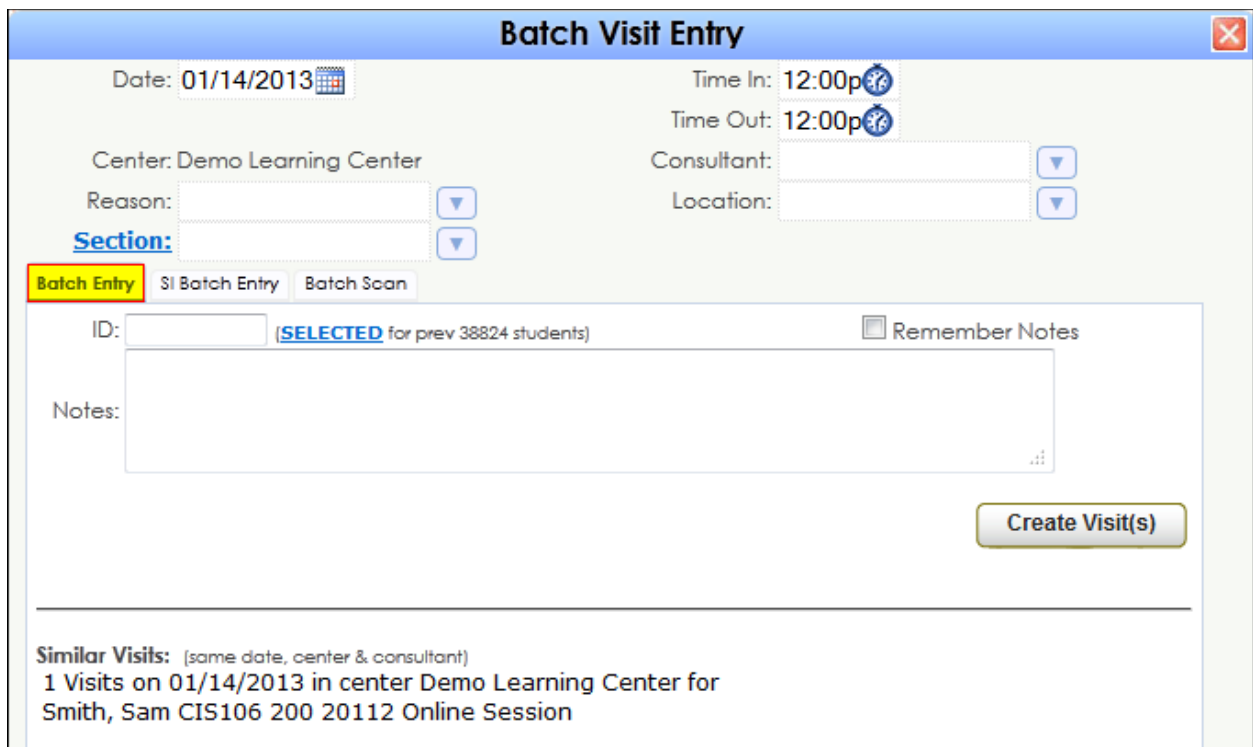
After clicking "Choose", you will be taken to the Batch Visit Entry form.
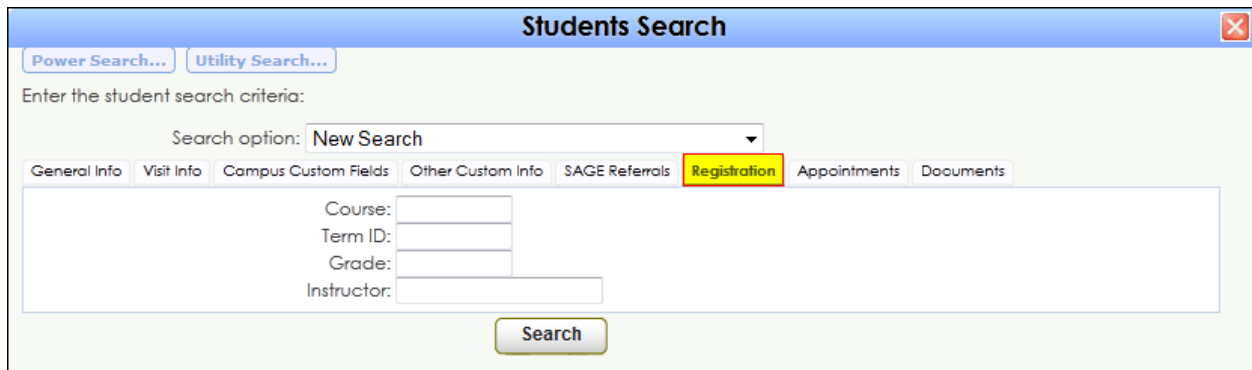
1. Batch Entry

The first tab selected will be the Batch entry tab. Here you can add the appropriate data for the group session that occurred, similar to the process for the Quick Visit Entry form. Fill in the Date,) Time in/Time Out, Consultant, Location (if necessary), Center, Reason, Subject (Section), and any Visit Notes that may apply in the "Notes" field below.
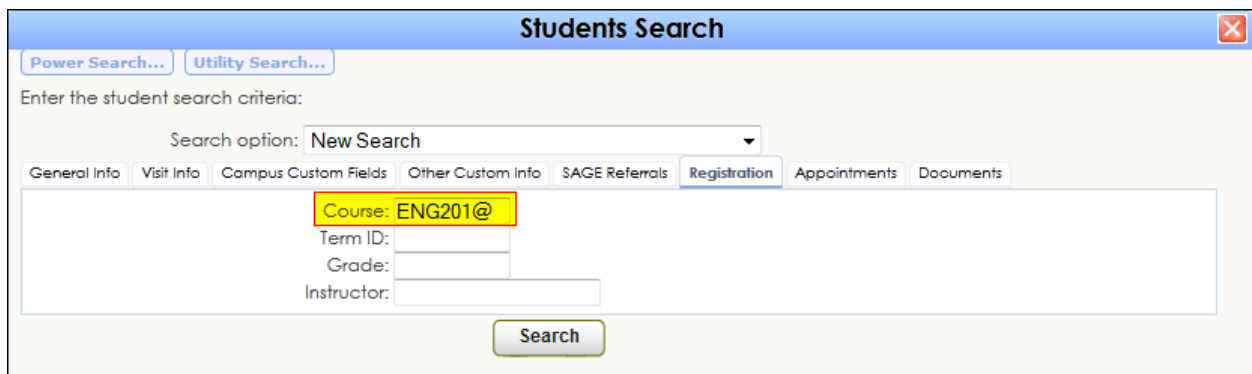
The last criteria that we need to add will be ID numbers for the group of students that attended the session. In order to handle entering these ID's in an efficient manner, the Batch Visit Utility is able to draw ID numbers based off of a Search in your *Student Listings*. For this next example, we've defined our search using the course ENG 201.

In your *Student Listings* (TracNav > Search Glass > Students), click *List Options > Search*. Navigate to the *Registration* Tab to the right.
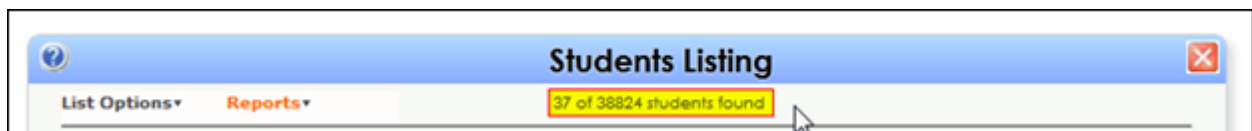
Here we will enter the Course Title as ENG201, followed by the wildcard (@) symbol to include All sections for this subject – i.e. ENG201-11370, or ENG201-12457.

After clicking Search, the system finds 37 of 38,823 students who are enrolled in any course that begins with ENG201.

Now, when opening a new Batch Visit Entry form, the SELECTED field shows "for previous 37 students".

To draw the ID numbers for these 37 students found via Search, we can simply click on the SELECTED hyperlink to the right of the ID field, and when we click "Create Visit(s)" after all information is entered, the Batch Visit Utility will create a Visit Record for these 37 students.

One common issue to be cautious of regarding Batch Visits involves this SELECTED hyperlink. If NO search for students is performed to narrow down your selection, the Total number of students in your Trac system database will be SELECTED. In this case, Visit records will be created for your ENTIRE student population (for this example, 38,824 students). This is a fairly common occurrence perhaps due to the ease with which this step can be forgotten, so be wary of creating MASS Batch Visits. If such a situation does occur, email Redrock at support@go-redrock.com for assistance.

Similar Visits

The Similar Visits section towards the bottom of the Batch Visit Entry form simply shows any similar visits for the ID numbers that you've entered based on Date, Center and Consultant. If any student (based on the ID numbers that you've entered) made a Visit on the Same Date, to the same Center, and with the same Consultant relative to the Batch Visit data that you entered, the system will let you know which Students have similar visits, which center(s) these visits occurred in, and on what date(s). This in some ways acts as a Red Flag, notifying and warning the User who is entering Batch Visit data of any Visit entries that hint at Duplicate records. For example, if a Batch Visit Entry was filled out for 10 students, and your Similar Visits section shows 10 similar visits for those 10 students, this would imply then that a Batch Visit Entry was already created for the multi-person/group (10 student) session that occurred.

2. SI Batch Entry

The SI Batch Entry works in the exact same way as the Batch Entry, with the exception of how ID numbers are entered. Users are still able to base their Student Selection off of a search, however there is another option available here.

Defining your course selection through the Section field, as shown in the screenshot above, will prompt the system to load the course enrollment below. The system will divide the course enrollment into two columns, the column on the left lists students (enrolled in ENG 101) who have visited any Centers, and the column on the right lists students who have not visited any Centers. Attendance can be marked simply by checking the checkbox next to each student's name. This gives the recording of Visit data some added versatility and flexibility, as some students will not always be able to be found through broad Searches.

3. SI Batch Scan

The SI Batch Scan Utility may be used to process scanned ID data from Card Readers or Barcode Scanners. Data could include Student ID #s, Visit Time, Visit Duration, or several other Visit Data fields. This collection of Visit Data can then be imported into your Trac System through the SI Batch Scan Utility. Please contact Redrock support (support@go-redrock.com) to configure the Batch scanning process. Redrock will need a sample of your Data Extract file as well as some details regarding the future destination of Visit Data (Center, Subject, Reason, Consultant info, etc…), which may be discussed further through email.

Batch Visit Entry

Date: 01/11/2013

Time In: 12:00p
Time Out: 12:00p

Center: Demo Learning Center

Consultant:

Reason:

Location:

Section:

| Batch Entry | SI Batch Entry | Batch Scan |

Batch scans is a customized script that may be used to process scanned ID data. Please contact **Redrock** for configuring the batch scanning process. [?]

Notes:

Scan Data: _____ Browse...

Additional Scan Parameters:

Param1: _____   Param2: _____
Param3: _____   Param4: _____

Process Scans

Recording Visits Through: Appointments

Visit Data may also be recorded through Appointments. While appointments are scheduled and appointment data is recorded, the associated Visit still needs to be recorded for Reporting purposes as well as for Attendance purposes. We can do this directly from the Appointment Record. Here is an example detailing this process.

The following screenshot displays the Schedule for our Consultant Jane Doe. On Wednesday, we see that Jane has an Appointment with student Sam Smith at 9:00 am for English 101.

When we click on the blue 9:00a hyperlink, the Appointment Entry window appears displaying the Appointment details.

Manual Visit Entry through Visit Info

There are three options to enter Visit information in the Appointment record. The first option is to enter the Visit information manually. Click on the Visit Info Tab to record Visit Info.

In the Visit Info Tab, users can enter Visit Data for the associated Appointment, in this case the 9:00am appointment between Jane Doe and Sam Smith. Users can fill in the Date, Time In, Time Out, Subject, Center, Reason, Location, and add any relevant notes in the Notes field.

Clicking on the "Date" field will copy the Date and Time from the Appointment Record and paste these fields into the associated Visit Record.

Clicking on the "Center" hyperlink will copy the appointment Center, Subject, and Reason and paste these fields into the associated Visit Record.

Click "Save" to save the new Visit Record.

Auto - Create Visit on Save

The second option to enter Visit information allows a user to simply copy the information already populated on the Appointment Info tab. In the Appointment Info tab, notice the "Automatically create the visit when this appointment is saved" preference to the right of the Save button.

If this preference is activated and a User "Saves" the Appointment Record, all of the information on the Appointment Tab will be copied and pasted into the Visit Info Tab, and both records will be Saved.

Click *"Save"* to save the new Visit Record.

Visit Record Entry through Group Roster

The third option to record visits involves marking attendance through Group Appointments. Visit Records can be created by processing the Attendance of a Group Appointment. For the following example, we see a Group Appointment scheduled for our Consultant Jane Doe on Wednesday. Notice the "3/10" field next to the 8:00 am Appointment, which signifies that students have booked three of the ten available slots.

By clicking on the blue dropdown arrow to the left of the 8:00am appointment, we are able to view the current Group Roster for the Group Appointment. In the Group Roster that is displayed, we can see Sam's name in the current listing of Students.
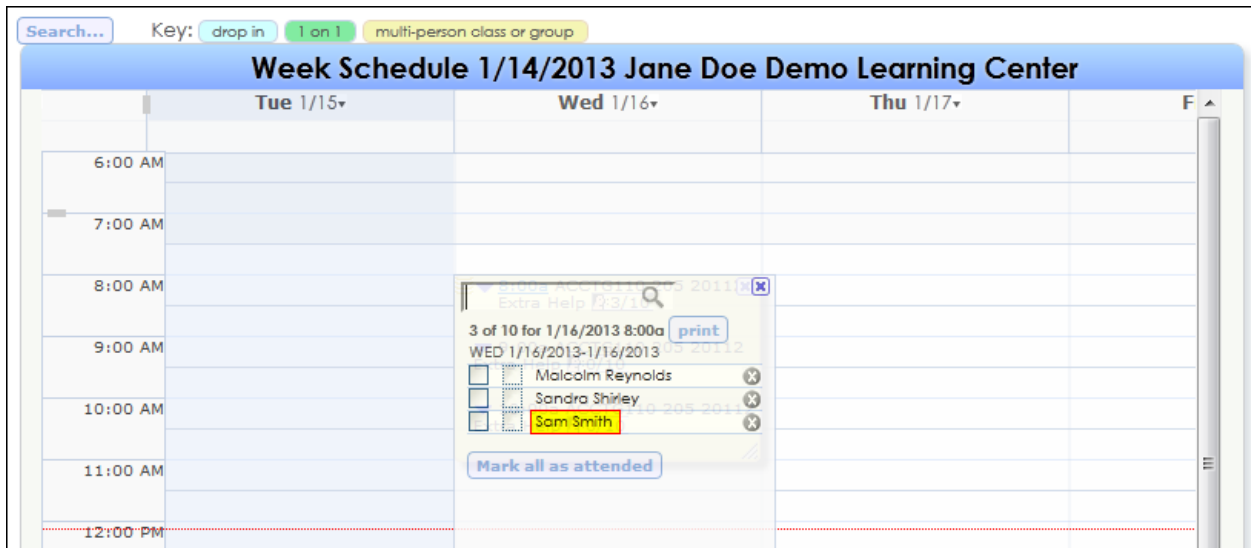
To the left of each student's name are two checkboxes. Activating the checkbox to the left will mark the Appointment status as Attended for the selected student and also creates a Visit record to link to the Appointment record. Activating the checkbox to the right will mark the Appointment status as Cancelled for the selected student, in which case no visit record will be created.

When the checkbox on the left is activated to indicate that our student Sam Smith has attended this appointment, the system will notify the user that a Visit record was created. A field will appear asking the user to enter any relevant Visit Notes for the Visit Record.
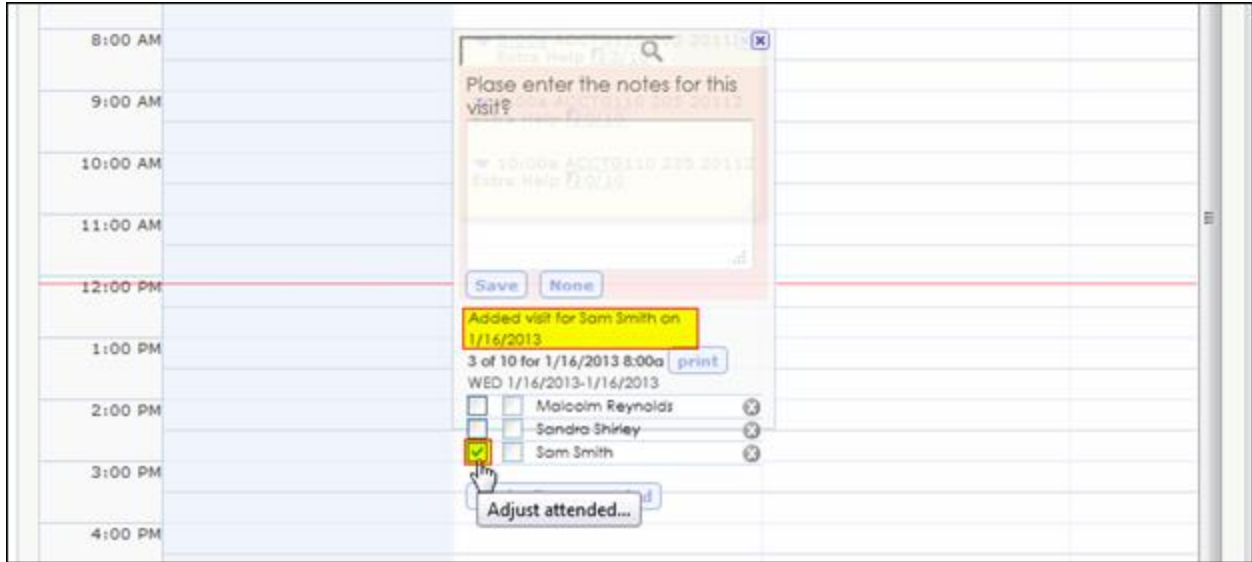
Enter any Visit Notes as needed and click "Save", or if no Visit Notes are necessary click "None" to save the Visit Record.

Log Listing: Configuration Options

The first major area of Configuration Options is comprised of your Center Profile Preferences. Center Profile preferences are global *per* Center Profile, or in other words, the settings put into place here will affect ALL subcenters under the selected Center Profile. All subcenters under a single Center Profile are subject to the rules set for the Center Profile's Preferences.

To get to your Log in/Out Preferences hover over the Search glass on the right side of the Trac Navigation bar (top left corner of Main Menu). Select Center Profiles, select your Center Profile, and navigate to the Prefs Tab. In the list of subtabs that load underneath, select the Log In/Out tab.

Use a Waiting Room

Activating this preference allows you to collect Wait Time data. This applies in the situation where a student comes in to your center, logs in, and then waits to be assigned a Consultant. After the student logs in, the system places this student in a "Waiting Room" until either a Front Desk worker or Consultant takes the next step and assigns the student a Consultant for the session.

The Waiting Room preference is typically used by Advising Centers. If a student Logs in and is waiting for the "First Available" Advisor, your Log Listing will indicate this student's status.

At this point, our student is still waiting to be assigned a Consultant. Clicking on the icon of a person sitting looking at the clock will then initiate the beginning of the session, at which point, the "waiting to see" message will change to "being seen by".

Choose Consultant on Login

Activating this preference allows the user who is signing in to select a Consultant during the *Login* process. The "# Choices" field just to the right determines the maximum number of Consultants displayed during Login. Consultants displayed in the drop down box during Login will be organized alphabetically, so if 30 consultants are linked to your Writing Center and you set the max to 10, the first 10 Consultants in alphabetical order will be displayed, if the Writing Center is selected.

Set initial status to 'waiting' on log in

This preference, if activated, will set the Student's initial status to 'Waiting' upon log in. This preference is designed based on the assumption that Wait Time is a data field that is being collected.

And include wait time in total time for visit

Activating this preference will include wait time with Total Visit Time. If Wait Time and Visit Time need to be separated, do not activate this preference.

Allow "First Available" as a choice

This preference, if activated, allows "First Available" as a choice for students when selecting a Consultant. The "First Available" choice allows Consultants to then claim a student for a session, or Front desk workers to then assign a student to a Consultant.

Only 'First Available' for these subcenters (blank for all):

Activating this preference will only allow the "First Available" choice when users are asked to "Choose a Consultant".

Choose Consultant on Logout

Activating this preference allows the user who is signing in to select a Consultant during the *Logout* process. The "# Choices" field in the "Choose Consultant on Login" determines the maximum number of Consultants displayed in this preference as well. The checkbox next to "Required", if activated, will force students to select a Consultant.

Ask for Subject

Activating this preference asks the user who is signing in to select a *Subject* for the session. The "Display # Choices" field just to the right determines the maximum number of Subjects displayed during Login.

Use section schedule on Logging Visits in

Activating this preference will prompt the system to check a Student's Class Schedule when the selected Student is logging in. Activating this preference will only ALLOW students to login during class times. Typically this preference is used for Attendance purposes. Keep in mind that in order for this preference to function properly, student Class Schedule information must be imported or added to your Trac system database (Class start time, end time, Course ID, student name/ID, etc…)

Yes, use time window (____) min before, and (____) min after

The settings entered in this preference determine the tolerance level for both the **"Use section Schedule on Logging Visits In"** preference above, and the **"student may not log in during class time"** preference below. For example, let's say we enter 10 minutes into the "before" field and 10 minutes into "after" field for this preference. If the **"Use section Schedule on Logging Visits In"** preference above is activated, students will be able to log in up to 10 minutes before class and 10 minutes after class. If the **"student may not log in during class time"** preference below is activated, students will NOT be able to log in up to 10 minutes before class and past 10 minutes after class ends. If both preferences are checked, the system will disregard the first preference (**"Use section Schedule on Logging Visits In"**), while still using the time/tolerance parameters defined in this setting.

Display section even if no schedule data exists (otherwise exclude)

This preference, if activated, will display a Section even if said section does not have the corresponding schedule data for a student(s). So if not all courses have associated schedule data, they may still be displayed so students may log in.

Ask for Reason

Activating this preference asks the user who is signing in to select a *Reason* for the visit. The "# Choices" field just to the right determines the number of Reasons displayed, and consequently, the size of the field that Reasons are listed in. Enter "1" in the "# choices" field to create a Pull Down menu for Reasons.

Conclude related visits when a Consultant concludes a work visit.

A related visit occurs when a Consultant signs in for a Work visit (clocks in), and a student then signs in for a session with said Consultant. This student visit is then defined as a "related visit" for the Consultant. The activation of this preference determines whether these "related visits" will also be concluded when a Consultant signs out of their work visit, or logs off using the "work" reason. Activating this preference will proceed to conclude all related visits (to a Consultant), when said Consultant clocks out.

Student may not login during the student's class time

Activating this preference will prompt the system to check a Student's Class Schedule when the selected Student is logging in. If said Student is supposed to be attending a scheduled class at the time

of login, the system will deny Access (for the reason of having to attend class). The Time window/tolerance that the system will allow can be set through the preference above "Use Time Window (___) min before, and (___) min after" (for the **"use Section schedule on logging visits in"** preference). Keep in mind that in order for this preference to function properly, student Class Schedule information must be imported or added to your Trac system database (Class start time, end time, Course ID, student name/ID, etc…)

Delay for welcome / goodbye messages: (__) / (__) seconds

During the login/logout process, 2 brief messages are displayed: a welcome message and goodbye message. This preference determines the length of time which these two messages are displayed. When set to zero or left blank, the welcome and goodbye message will remain on a user's screen until they click "Continue". Any value entered greater than 0 will prompt the system to automatically close these messages, after the number of seconds that you specify here.

Delay for log listing refresh: (___) seconds (minimum 60 seconds)

This preference determines the rate at which the Log Listing page automatically refreshes. In the situation, let's say, where a computer at the Front Desk constantly displays the Log Listing, this preference is designed to keep the list of students currently logged in to your Subcenters as accurate and updated as possible by reloading itself every (____) seconds.

Auto Terminate Visits Longer Than:

The Auto Terminate Preference is designed to handle a few issues regarding the recording of Visit data. First, what happens if a student logs in at 8am to your Subcenter, leaves for class, comes back and logs out at 5pm. Second, what happens if a student forgets to log out after a session? You as an Administrator sign in to the Trac system one day, view the Log Listing, and see a student who has made an 18 hour visit. When looking at the Visit Summary for the previous day, you notice that another student also made a 9 hour Visit (from 8 am to 5 pm). Considering the validity of the Reports you need to run at the end of the month, you turn to the Auto Terminate Preference for redemption.

The Auto Terminate Preference works hand in hand with the Auto Termination Automated Event. The Automated Event runs off of the settings that you define in these Auto Terminate Preferences.

The Auto Termination Automated Event takes every Visit that is Longer than (___) minutes, and changes the Visit time to (___) minutes. The first preference determines which Visit records will be modified based on the Time settings that are put into place.

To activate this preference, enter a number of minutes in the first field. This number will set the Maximum Time for a Visit Duration. Enter a number of minutes in the second field to assign a default Time value to all of the visits that have a duration greater than the Maximum Time for Visit Duration that was set in the first field.

Auto Terminate Visits Longer than (____) minutes, and change visit to (___) minutes.

Let's say we set the first field to 180 minutes, and the second field to 60 minutes. This signifies that ANY visit longer than 3 hours will be automatically changed to a duration of 1 hour. This change will take place whenever the Automated Event (Auto Termination) takes place (typically nightly). If the second field is blank or set to zero, Visit Records that exceed 180 minutes will be deleted.

Auto Terminate on Log List: and set the visit time to (___) minutes

The Auto Terminate on Log List preference handles the situation in which students forget to log out of your center(s). While the Auto Terminate preference above modifies visit time based on length of visits, the second Auto Terminate preference will remove any students who remain on your Log Listing, and then change their visit time to a value that you determine. These two preferences deal with two different types of Visits. The first preference handles Visits that have been completed, as illustrated in the first example above (student visits from 8am to 5 pm). But in the situation where a student forgets to log out, the Visit has not yet been concluded. The difference between the two students lies in the fact that the second student did NOT sign out. This preference will modify Visits that have not yet been concluded (Student is still on the Log Listing). Basically, when the Automated Event runs, any student who is currently still on your Log Listing will be removed from the Log Listing, and the respective visit duration will be changed to the time you set in the second setting (set the visit time to).

- **Log out of this center when student logs in to another center**

     This preference, if activated, will limit a student to only be able to be logged in to one center at a time.

Warn user if visit time less than (____) minutes

This preference, if activated, will display a warning message to Students who log off after a certain length of time (brief). The default value is set to 15 minutes, and so if this preference is activated, students who are attempting to log off before the 15 minute mark, will receive a warning, which you may customize through the next preference.

Warning message to display (…)

The (…) icon, when clicked, will expand to a larger text field, where users can enter the custom Visit Warning message to send to users who may be logging out too early. The message could be something along the lines of, "You haven't completed a 15 minute visit yet. Are you sure you want to log off?"

Display subject in Log List

Activating this preference will display Subjects for visits shown in the Log Listing. This privilege can be further restricted in the Group Access preferences.

Display reason in Log List

Activating this preference will display Reasons for visits shown in the Log Listing. This privilege can be further restricted in the Group Access preferences.

Display Student ID in Log List

Activating this preference will display Student IDs for visits shown in the Log Listing. This privilege can be further restricted in the Group Access preferences.

Obscure Student ID (****) on Log In

Activating this preference will obscure Student IDs entered in the Log Student Window. This privilege can be further restricted in the Group Access preferences.

Allow creation when ID not found**

Activating this preference will allow a User to create a new Student Profile if an ID or Full Name entered in the Log Student Window is not found.

Consultant Choice on Login

Allows for customizations of Consultant choices. Contact Redrock Support for details (support@go-redrock.com)

Center Choice Modifier

Allows for customizations of Center choices. Contact Redrock Support for details (support@go-redrock.com)

Subject Choice Modifier

Allows for customizations of Subject choices. Contact Redrock Support for details (support@go-redrock.com)

Reason Choice on Login

Allows for customizations of Reason choices. Contact Redrock Support for details (support@go-redrock.com)

Logged in via: (Staff) or (Student)

Defining this preference is essential for perfecting your Login/Logout process. Your Trac system must have this distinction made in order for your system to successfully design the Login procedure for a specific User. For instance, the following preference "**Show student messages on Login**" may not be logical if a Staff member is logging in your students.

Show student messages on Login

Activating this preference will display the Student's recent message history during the Login process.

Login Terms and Conditions

You have the option of adding a Terms and Conditions that students must agree to before logging in to your Center.

Label for Acceptance of Terms: Default (I Accept)

This preference determines the Label for your Acceptance of Terms (See following Screenshot for Terms & Conditions)

Terms & Conditions: Acceptance of Terms

Logged out via: (Staff) or (Student)

Defining this preference is essential for perfecting your Login/Logout process. Your Trac system must have this distinction made in order for your system to successfully design the Logout procedure for a specific User. For instance, the following preference "**Show student messages on Logout**" may not be logical if a Staff member is logging your students in/out.

This distinction is typically more relevant in regards to Logging out, as it is during this part of the process that Visit Notes are entered. The User who is entering these notes into your Visit Records then becomes significant. If your Staff members are Logging students out, then the Notes section during Logout will be classified as Visit Notes. If students are logging themselves out, then the Notes section will be classified in the system as Student Remarks. This distinction must be made clear early in the process, so as to avoid confusion in running Reports and collecting accurate Visit Data.

Show student messages on Logout

Activating this preference will display the Student's recent message history during the Logout process.

Enter notes on logout, width (30) height (4) – (default values)

Activating this preference will allow Users to enter Notes during Logout. The Width and Height Fields determine the size of the Text field box that these notes can be entered into.

Enter notes on logout for work visits.

Activating this preference will allow Consultants to enter notes during Logout for *Work Visits*. Record notes per Work Shift may be beneficial for Payroll purposes or for historical reasons.

Auto lock visits older than: (___) days

Entering a number into the days field will activate this preference and prompt your Trac System to Lock Visit Records older than the number you set. Locking a Visit Record will prevent users from modifying or deleting any data. Groups may be given access to edit Locked Visits.

Time Zone Difference:

- **Time Zone Difference From Server: (___) hours**

   For example, if your Server is in EST and your Center in CST, the Time Zone Difference *FROM* Server would be = (-1).

Visit Custom Fields

Visit Custom Fields allow you to create Customized Questions to gather additional feedback from students during the Log in / Log out process. There is a limit of 8 Visit Custom Fields per Center Profile.

LOG LISTING / GROUP ACCESS CONFIGURATION SETTINGS

Group Access settings determine which Groups of Users are able to Log students in and out. The Group Access Preferences define in detail specific levels of access.

To get to your Group Access Settings, hover over the Search Glass on the right side of your Trac Navigation bar (top left corner on Main Menu). Select Center Profiles and click on your Center Profile. Select the Group Access tab.
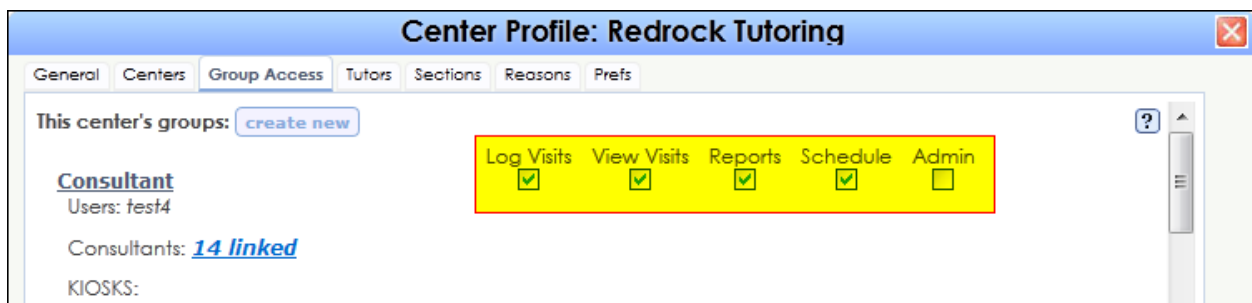
Log Visits To (Center Access Tab)

Adding Subcenters to this section will determine which Subcenters this Group (Consultant) will be able to Log Students to. The Green color reflects this Group's ability to both Log students in/out and View the Log Listing – described by the key below. A Subcenter coded in the Red color will only allow this Group to Log students into the Subcenter, but not able to View the Log Listing. The Grey color, on the other hand, indicates that this Group will only be allowed to View the Log Listing, while being unable to Log students into the Subcenter.

Log in/Out Tab

From the Log in/Out Tab we can define the specifics of our Group's level of Access. For this example, we are looking at the Consultant Group.

Allow User to Search by Name on Log Listing Users

This preference allows a User to search by name through the Log Student window. Entering any text will prompt the System to perform a search for Students by name and return with matching results.

Allow User to Search by Name on Log Listing KIOSKs

This preference allows a User to search by name through the Log Student window on a Kiosk or Self Sign-in Station. Entering any text will prompt the System to perform a search for Students by name and return with matching results.

Allow User to Search by Barcode on Log Listing **magnetic strip readers and barcode scanners**

This preference allows a User to search by a Barcode number through the Log Student window. Entering digits into the Log Student window will prompt the System to perform a search for Students by Barcode number and return with matching results. Barcode Numbers are typically assigned to work with Kiosks.

Allow User to Create Student when Not Found

This preference allows a User to create a new Student record if either an ID number is not found or Searches performed return with no results.

Allow User to Edit Students on Log Listing/Appts

This preference allows a User to Edit a Student's Record either from the Log Listing or from the Appointments Calendar.

Show Student Photos on Listing

This preference allows a User to be able to view Student Photos on the Log Listing.

Show Visit Center on Log Listing

This preference allows a User to be able to view the Center of Visit on the Log Listing. This preference must be enabled for Groups to access this info.

Show Visit Reason on Log Listing

This preference allows a User to be able to view the Reasons for students' visits on the Log Listing. This preference must be enabled for Groups to access this info.
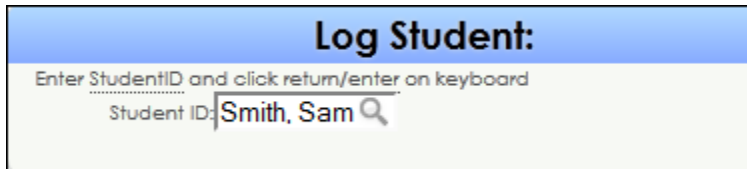
Show Visit Subject on Log Listing

This preference allows a User to be able to view the Subjects for students' visits on the Log Listing. This preference must be enabled for Groups to access this info.

Use Larger Font on Log Student Dialog
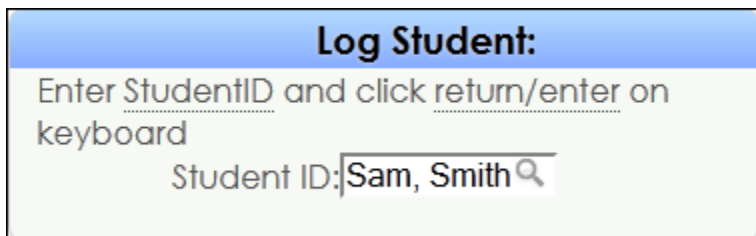
This preference enlarges the font displayed on the Log Student Field, so text is more easily viewed.

Use Larger Font on Log Student Dialog (inactive)

Use Larger Font on Log Student Dialog (active)

Chapter 12: Resources

Resources are items that may be checked in and out of your Center(s) and lent to students. The borrowing of resources at your center(s) can be tracked, recorded, and the data collected can be displayed through Reports. Your center(s) may have available textbooks, calculators, laptops, even tablets or iPads that students may utilize during their visit.

Creating a Resource

To add, edit and manage your resources, hover over the Search glass on the right side of your Trac Navigation bar (top left corner on Main Menu) and select Resources. To add access to the Resource Menu for a Group, see Chapter 3: Setup – Prefs - Group Access Prefs.

To add a new resource, click on List Options and select *"New Resource"*.

In the Resource Entry window that appears we can enter any relevant data for the Resource: *Barcode ID, Center, Title, Description, or Keywords* (to find by search). We can also regulate the *Max days out, Max Time Out*, or *Max Renewal* fields to control the amount of time this resource may be borrowed for.

An important field to note is the *Resource Type* field. Resources can be classified by Resource Type, for example: Text Books, Headphones, Calculators, etc…Resources can then be granted access to a group or restricted from a group based on the Type of the resource. To manage your Resource Types, go to your Utilities & Prefs > Advanced Prefs > ResourceTypes. Resource types here must be separated by a Enter or Return character.

In the lower half of the Resources Entry page are two sections.

On the left side there is a checkbox next to Available. Check this checkbox to make this resource Available. When students borrow this resource, the "*Due In*" field will populate according to the rules that you previously set (Max days out or Max Time Out). The "*Reserved By*" field allows a User to reserve this item for future use by disallowing the item to be checked out to any other student other than the student selected. Click on the search glass icon to reserve this item for a student.

You can enter a student ID or name in the Search field to locate the student who wants to reserve the resource. Hit Enter or Return to execute your search.
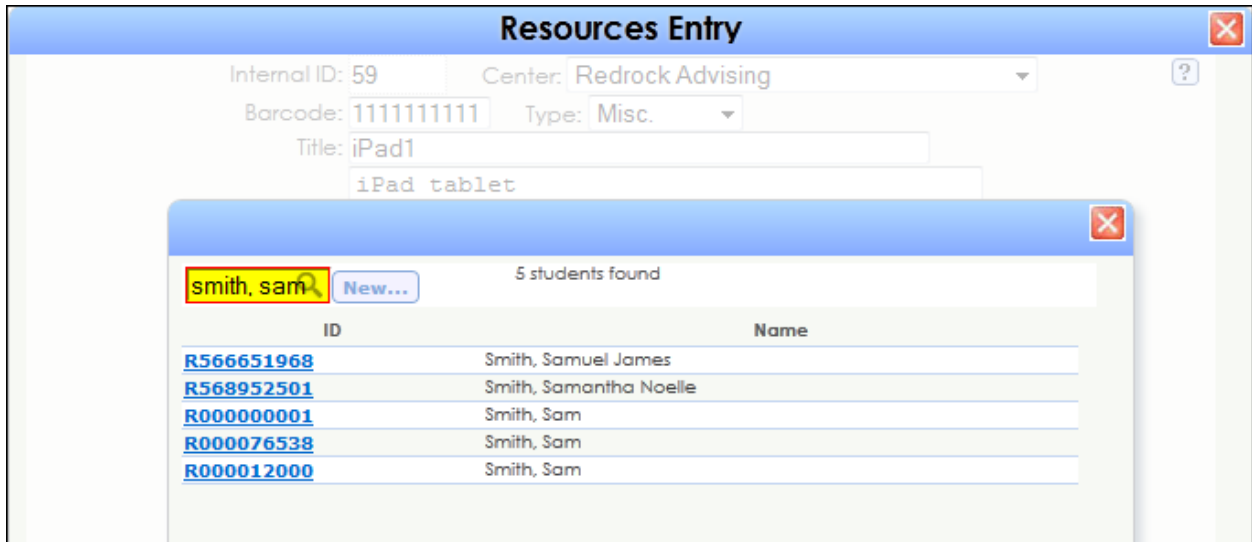
Select the student by clicking on their ID number, and the Resource Entry record will update with the student's new reservation.
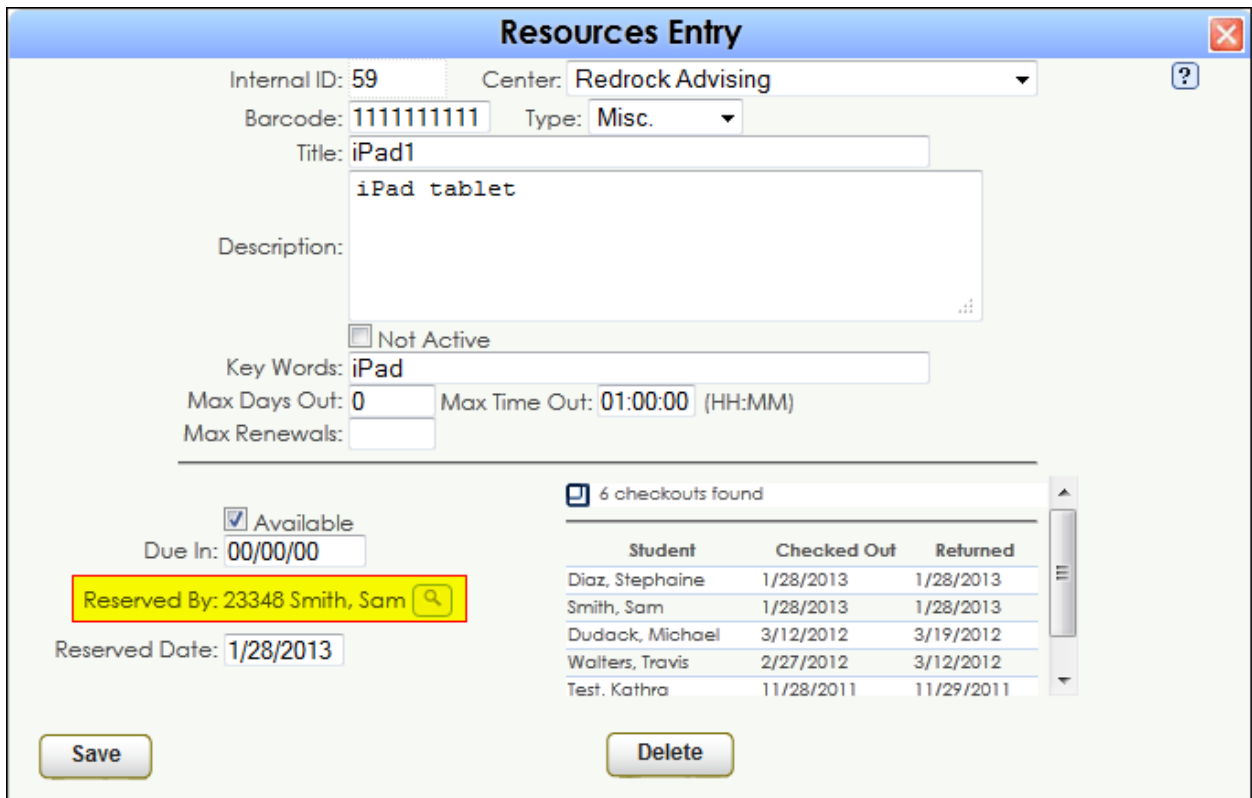
On the right side of the lower section there is an area that displays a history of the previous use of the selected Resource. We can see the names of students who checked this resource in and out, and the times that these events occurred.

Checking Resources In / Out

Resources are able to be checked in and checked out from several areas within your Trac System.

- Resources Listing
- Log Listing
- Log Resource

Resources Listing

The Resources Listing displays a list of ALL available resources entered into your Trac system, and also contains the corresponding record for each resource. We can quickly see barcode number, check out times, due in times, the associated center, as well as a description for each resource.

To check a resource out to a student, click on the blue arrow on the far right side.

Find Resource

Barcode: 1111111111
iPad1 is AVAILABLE
iPad tablet

Student ID/Barcode: **0000001**

1 records found.
00-0000-01 Sam Smith
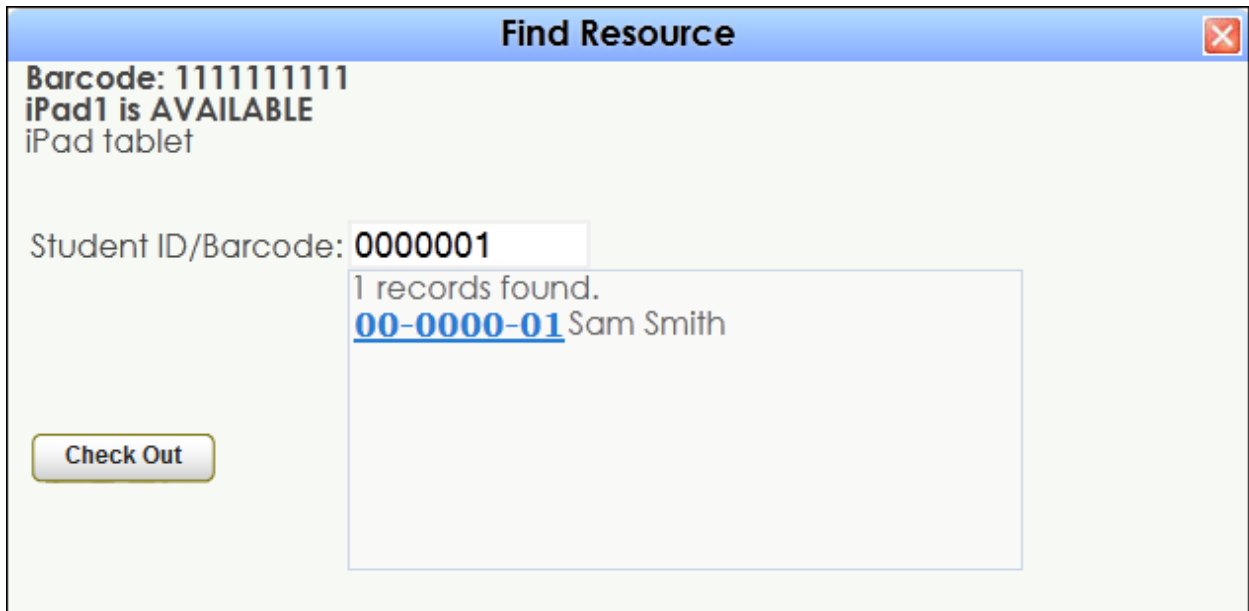
Check Out

In the *Student ID/Barcode*: field, enter our student's ID number or name to locate the student's record. Click on the ID number next to the student to check this resource out to our student. Click *Check Out* to complete the process.

Confirmation

1111111111 - iPad1 is now checked out,
Thank you **Sam Smith**.

Please return by **1/28/2013 at 10:10 AM**

Close
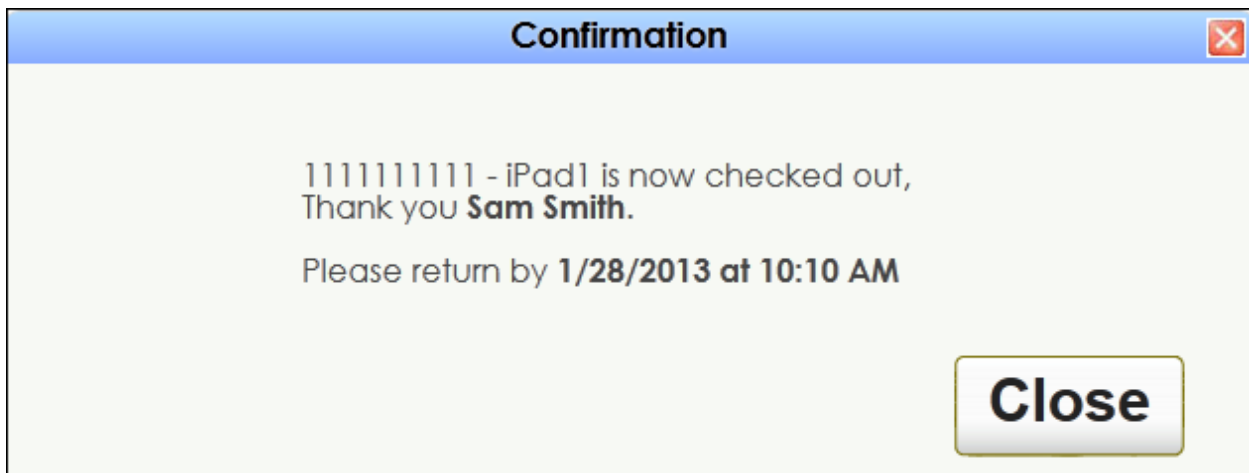
To check a resource in from a student, click on the right arrow ↰ on the far right side

Confirmation

1111111111 - iPad1 is now renewed,
Thank you **Sam Smith**.

Please return by **1/28/2013 at 10:21 AM**

Close
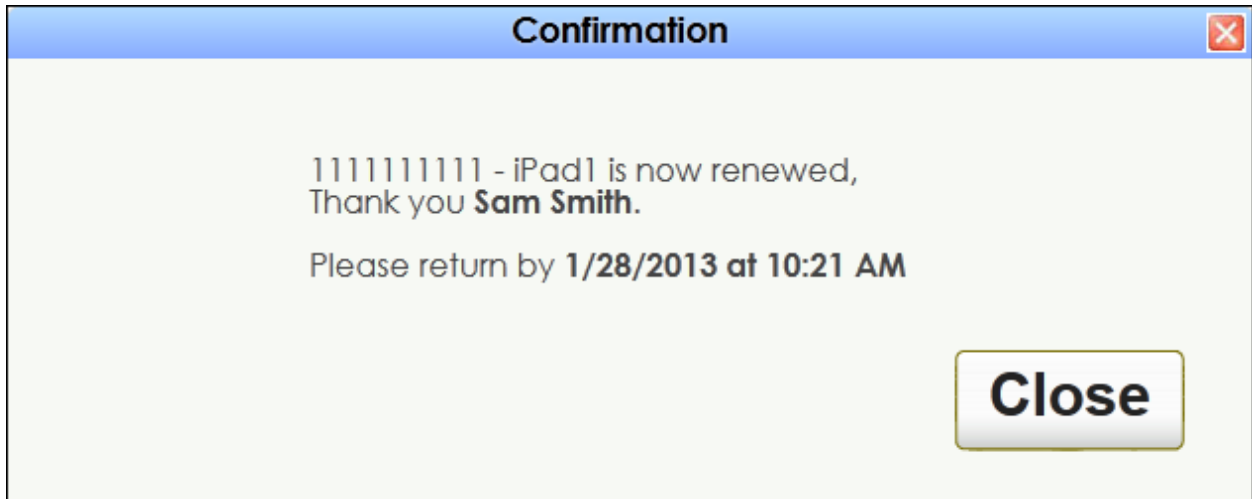
If a student wants to renew a checkout, click the Renew Check Out button to extend the date the resource is due.

Find Resource

Barcode: 1111111111
iPad1 is CHECKED OUT to Sam Smith
iPad tablet

Student ID/Barcode: [   ]

Check In   **Renew Check Out**
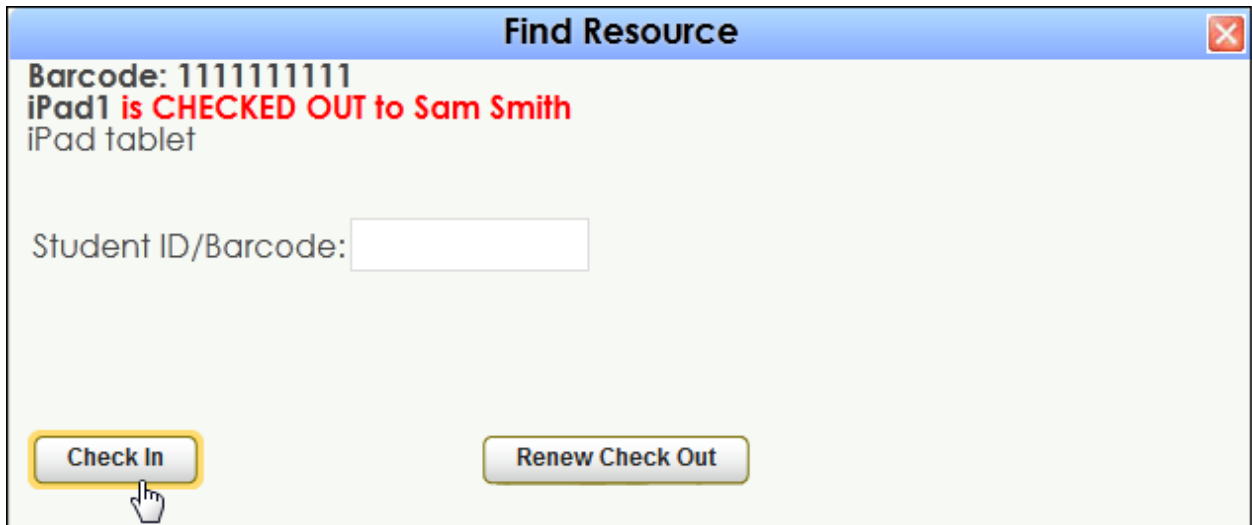
Click on the *Check In* button to check this resource back in.

Confirmation

1111111111 - iPad1 is now checked in,
Thank you **Sam Smith**.

Close
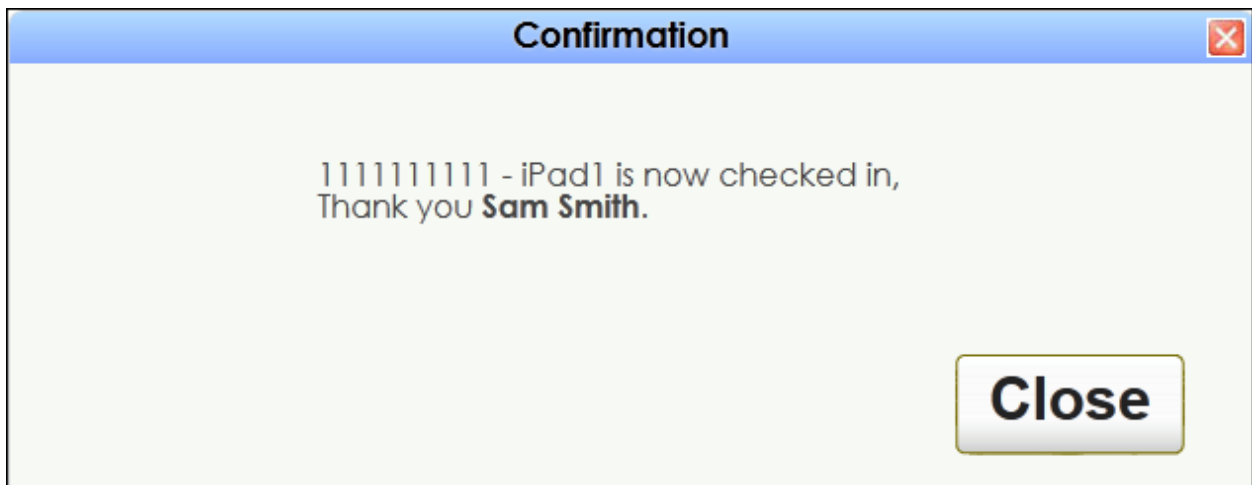
Log Listing

Resources may also be checked in and out to students directly from the Log Listing. Students who are currently logged in to your centers are able to borrow and return resources directly at the Front Desk.
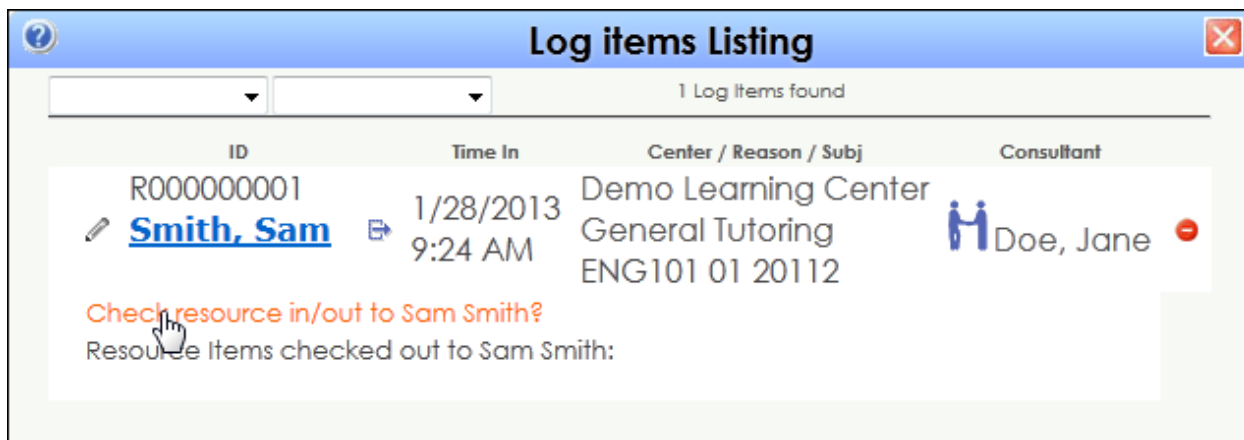
To be able to check resources in and out to your students directly from the Log Listing, you will need to add access per Group of users. (*See Chapter 3: Setup – Prefs - Group Access – Log in/out*)
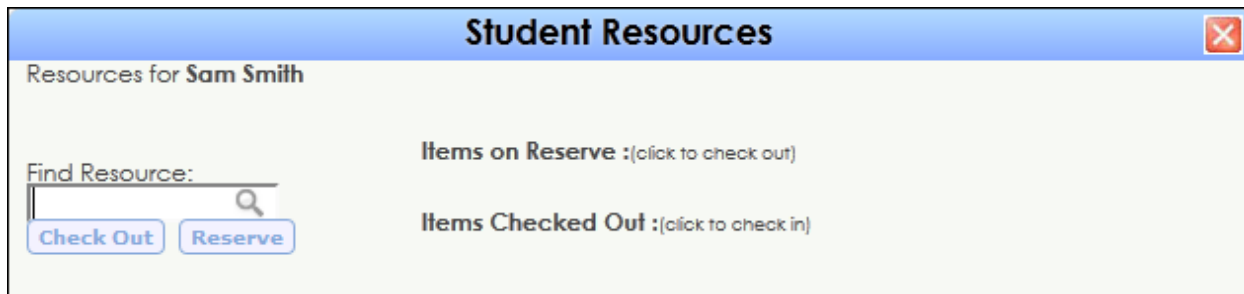
Click on *Check resource in/out to Sam Smith?* to begin the process of checking a resource out.

Here we can enter the *Name, Barcode*, or *Keyword* of a resource to locate the resource for our student.
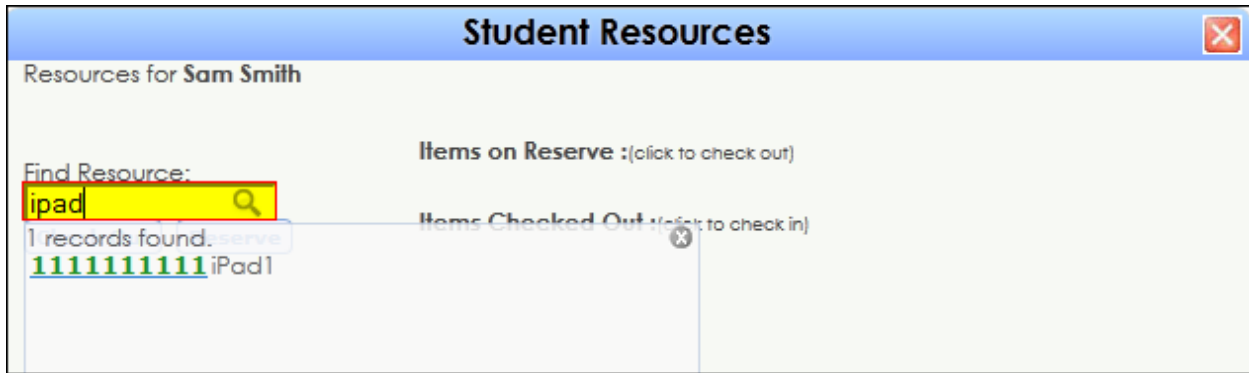
Click on the barcode ID next to the Resource to populate the field with the appropriate resource. Click *"Checkout"* to then check the item out to the selected student.
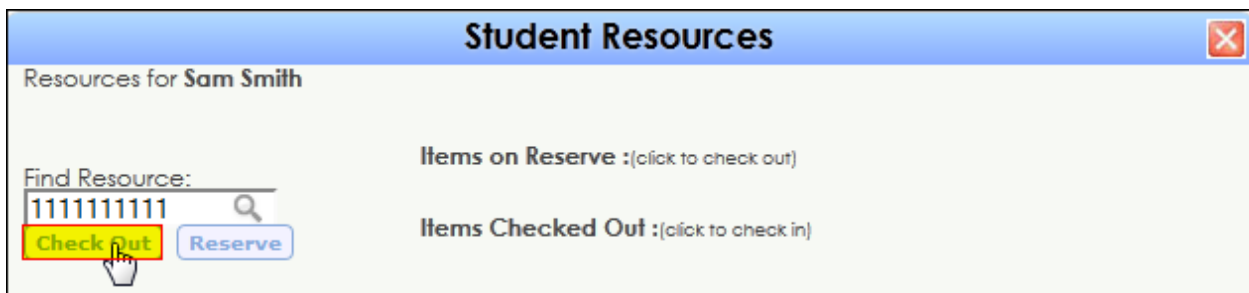
The system then notifies the User that the resource is checked out to our student Sam Smith.
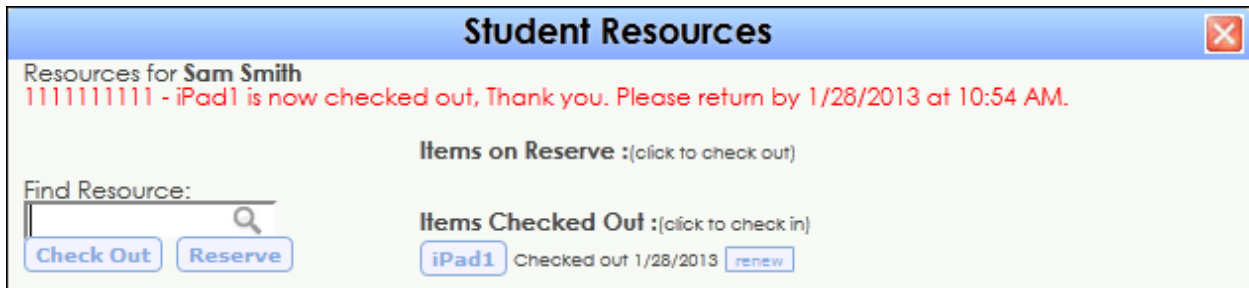
Log Resource

The Log Resource window, similar to the Log Student window, allows users to conveniently check resources in and out using a small window that appears at the top of every page. Access to the Log Resource window can be given through your Group Access preferences. Once sufficient privileges are granted, a user's MyPrefs may need to be adjusted as well to add the Log Resource function to a user's account (*See Chapter 3: Setup – Prefs - Group Access – Log in/out, also See Chapter 16: Customize my Trac - MyPrefs*).

A user can enter a Resource barcode, name or keyword in the *Log Resource* field to locate a Resource to check in/out.

Once the barcode ID# hyperlink is clicked, the system will inquire as to which student is borrowing this resource. Enter a Student ID number or name to locate our student record.
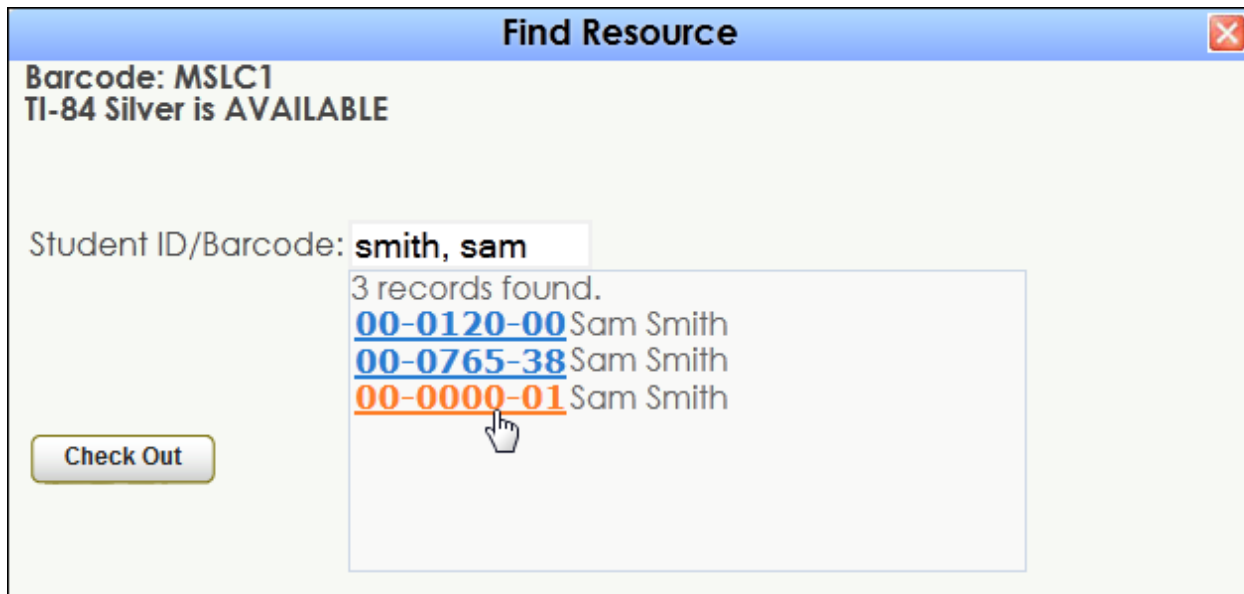
After performing the search and finding your student, click on the blue ID# hyperlink next to our student's name.

Now click the *Check Out* button to complete the process.

Confirmation

MSLC1 - TI-84 Silver is now checked out,
Thank you **Sam Smith**.

Please return by **1/29/2013 at 10:49 AM**

Close
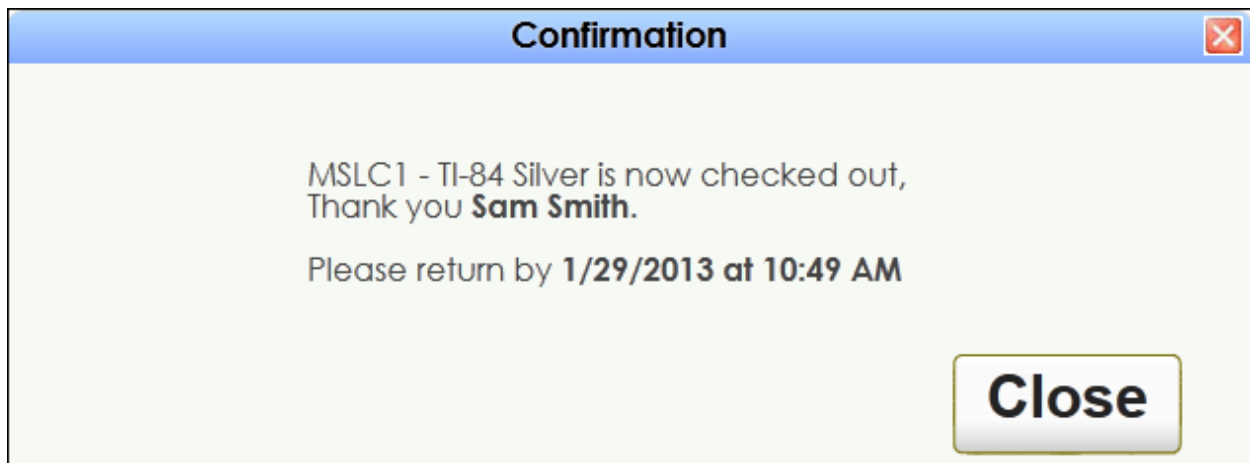
Alternatively, we may enter a student ID number in the *Student ID* field of the Log Resource window to locate a student first. Hit Enter or Return after the ID is entered to start the process.

Log Resource:

Log Resource:

or Student ID: 00001

REDROCK
COMMUNITY COLLEGE
Redrock - Redrock Tutoring

Student Resources

Resources for **Sam Smith**

Find Resource:

Check Out   Reserve

Items on Reserve :(click to check out)

Items Checked Out :(click to check in)
iPad1   Checked out 1/28/2013   renew
TI-84 Silver   Checked out 1/28/2013   renew
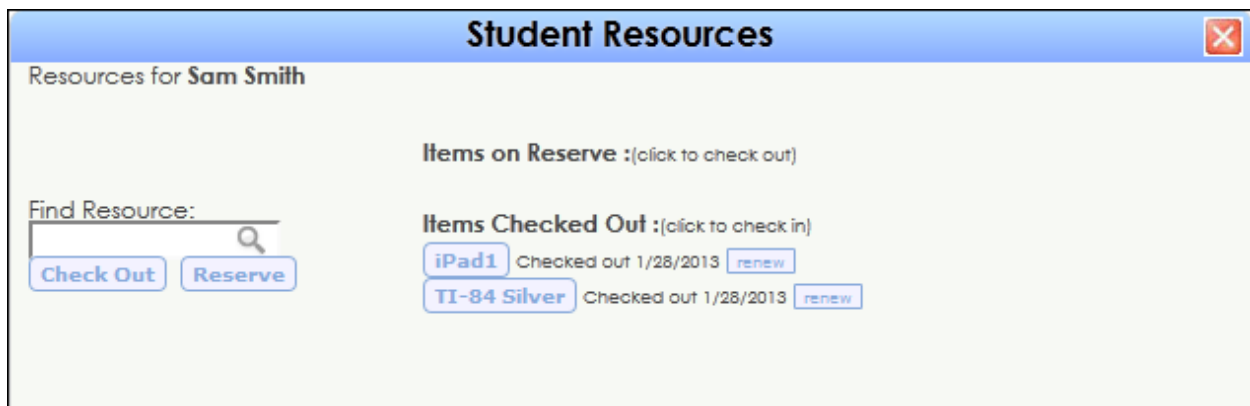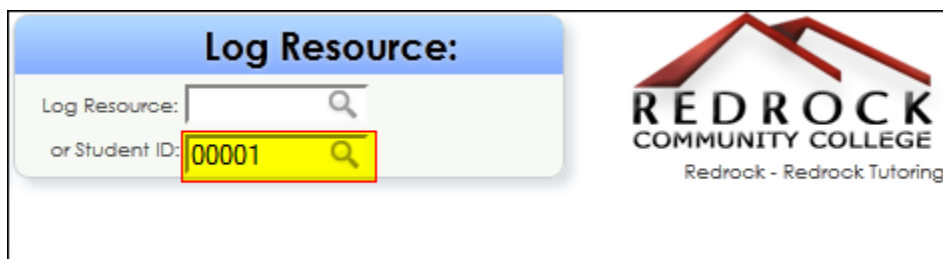
In the Student Resources window that appears we are able to see a list of resources that our student has either on Reserve or Checked Out. To find a resource to check out for this student use the *Find Resource* field to perform a search.
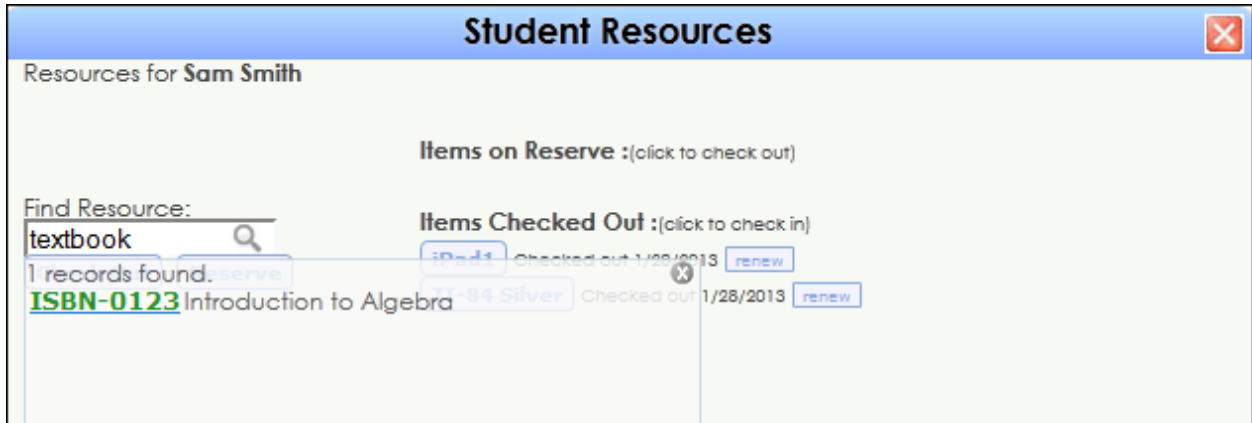
After entering a barcode number, name, or keyword, click *Check Out* to check out the resource, or *Reserve* to reserve the resource for our selected student.
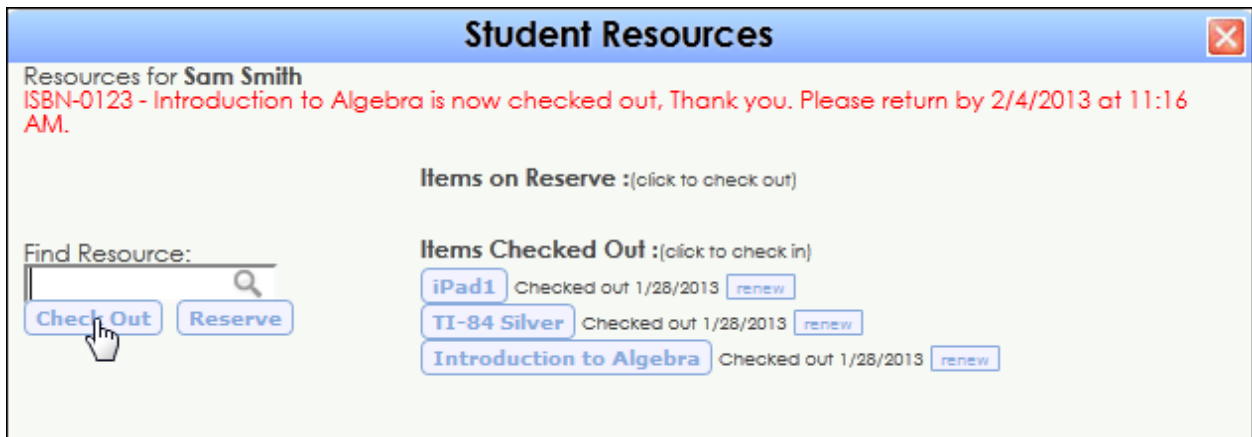
Resource Types

Chapter 13: Faculty

The Faculty Group can play a unique role within your AdvisorTrac or TutorTrac system. The Faculty Group represents the Instructors of courses available at your campus that may be imported into your Trac system. Typically, the role of the Faculty Group is highly dependent on the additional module SAGE.

With SAGE (Student Alerts and Group Events), we can allow Faculty members to create early-warning Referrals for students who may be struggling in their courses. Faculty members can log on to your Trac system, view students who are enrolled in their courses, and track the progress of their students. If a faculty member identifies a student who may be struggling in his/her course, they have the option of creating a Referral. Referrals are fully customizable, but typically contain the reasons as to why the student is having difficulty, as well as any recommendations or action items the faculty member wants the student to take. Faculty members for instance can recommend that the student receive "x" number of hours of Advising, Tutoring, or Counseling. These referrals can then be sent out to Tutoring Centers, Advisors, Coaches, Deans, and to the Students themselves, if appropriate.

Outside of SAGE, the Faculty Group, in regards typically to TutorTrac, may also be curious as to which students enrolled in their classes are making visits to your Tutoring centers to receive extra help. In this case, we can send out Automatic emails to Faculty members detailing information of these students' visits. We can send Visit Summary reports on a weekly basis, or individual Visit reports on a day to day basis. These emails can contain the Student's name, duration of visit, total number of visits (if summary report), and any Notes that the student or consultant may have recorded.

IMPORTING FACULTY INFORMATION

Faculty information may also be imported into your Trac system from your Student Information System. Whether your campus uses Banner, Datatel, Peoplesoft, or even a homegrown system, we can extract data from your Student Information System and Import the appropriate data into your Trac system. This process can be run on a manual or automated basis.

The following table lists the fields that are available for importing into the course enrollment (or progress reports) of TutorTrac. Note, instructor fields may be imported in a separate text file.

COURSE ENROLLMENT / FACULTY TABLE

Name	Type	Required	Description
Student ID	A20	Yes	The unique numeric ID of the student. In some cases the ID is the secondary alphanumeric ID - please indicate to us which ID will be utilized.
Course	A40	Yes	The course in which the student is enrolled
Section	A40	Yes	The section in which the student is enrolled
Title	A80	Yes	The name of the course in which the student is enrolled
TermID	#	Yes	The term code for the semester that the student is enrolled in: 032 might be the year 2003 Spring, and 034 might be the year 2004 Summer.
Instructor ID	??		If utilized, coordinate the use with Redrock Software.
Instructor Name	A60		The fullname of the instructor
Instructor First	A40		The instructor's first name.
Instructor Last	A40		The instructor's last name.
Instructor Email	A80		The instructor's Emaill address.
Instructor Phone	A20		The instructor's phone.
Instructor Sal	A8		The Salutation or Degree for the instructor (Phd, etc.)
Grade	A20		The Grade received for this course.
Value	#		The Numeric grade value
Date	D		Date grade/report issued.
Type	A40		The report type (midterm, final, etc.) In some cases it is simply a flag used by the system to indicate the disposition of the course (REGISTERED, DROPPED, WITHDRAWN).

FACULTY EMAILS

Often, instructors or faculty members would like to know if any of their students enrolled in their courses are receiving tutoring or advising. In this situation, automated emails can be sent out to faculty members detailing Visits made by students enrolled in their courses, for the subjects that they teach. Because this process requires some customization, contact Redrock support for more details at support@go-redrock.com.

Chapter 14: List Management

List Management: Overview

The List Management capabilities allow you to add students to a list and then retrieve the list of students at a later time for a variety of purposes. Lists may be compared to each other in order to find intersections, unions, and differences. Lists may be static or dynamic.

Practical Uses for Lists

Lists may be used to group any population of students together and give the user the ability to quickly display all students that belong to a list. This functionality in and of itself makes lists useful indeed. But there are other ways that lists can be utilized to provide added functionality in the use of the tracking software.

- Centers may require that only certain students are allowed to log a visit to the center. This can be done by adjusting the preference in the subcenter entry screen to constrain logging visits to students from a certain static or dynamic list.

- Centers may also require that only certain students be allowed to book an appointment in a particular center. The same subcenter entry screen gives the ability to constrain appointment booking to only those students that belong to a particular static or dynamic center.

- Lists might be used for grouping certain student populations, like students that participate in a particular sport - this list of students might be particularly important to a coach.

- Lists might also be used to categorize students that qualify for a certain program or be part of a special needs program where those students are reported on in a special fashion. Since the standard reports include an option for choosing a list to use for the student population on the report, organizing the students into a list makes reporting on the group of students straight forward and easy.

Static Lists vs. Dynamic Lists

Static Lists

Static Lists are lists of students that you create where you may manually add or remove the student from the list. Thus the student stays on the list statically until you remove the student.

Dynamic Lists

Dynamic Lists are lists where you provide search criteria that describes the students that belong to the list. Each time the list is displayed the stored search criteria is executed to find the list of students that match the criteria. Thus the population of students can change from day to day, making this list very dynamic.

Dynamic Lists may be based on another dynamic list. For example if you had two dynamics lists, one called Baseball that searched for all students that have the value baseball entered for the sport field, and another dynamic list called football that did a similar search for the key value foot ball, you could then have another dynamic list called Athletes that looks for all students that are members of either the baseball list or the football list. This means that anytime the value of the sport field changes for a student, his or her membership any related lists are automatically updated.

List Management: Preferences

In order to manage students in lists, users must have access to the *student listing* screen, which is accessed by student search. In your Group Access Preferences, we need to activate the following preference for the appropriate groups:

Any existing lists may be given to a user's group. This is done on the *center access* tab of the group entry screen. Access to a list may be given for *read only* purposes. *Search only* means that users may only find the students in the list but may not assign a student to the list. *Search and Edit* access to the list allows a user to remove or add students to and from the list. Note: any lists that have been removed from the system may be display as Not Found in the list access field.
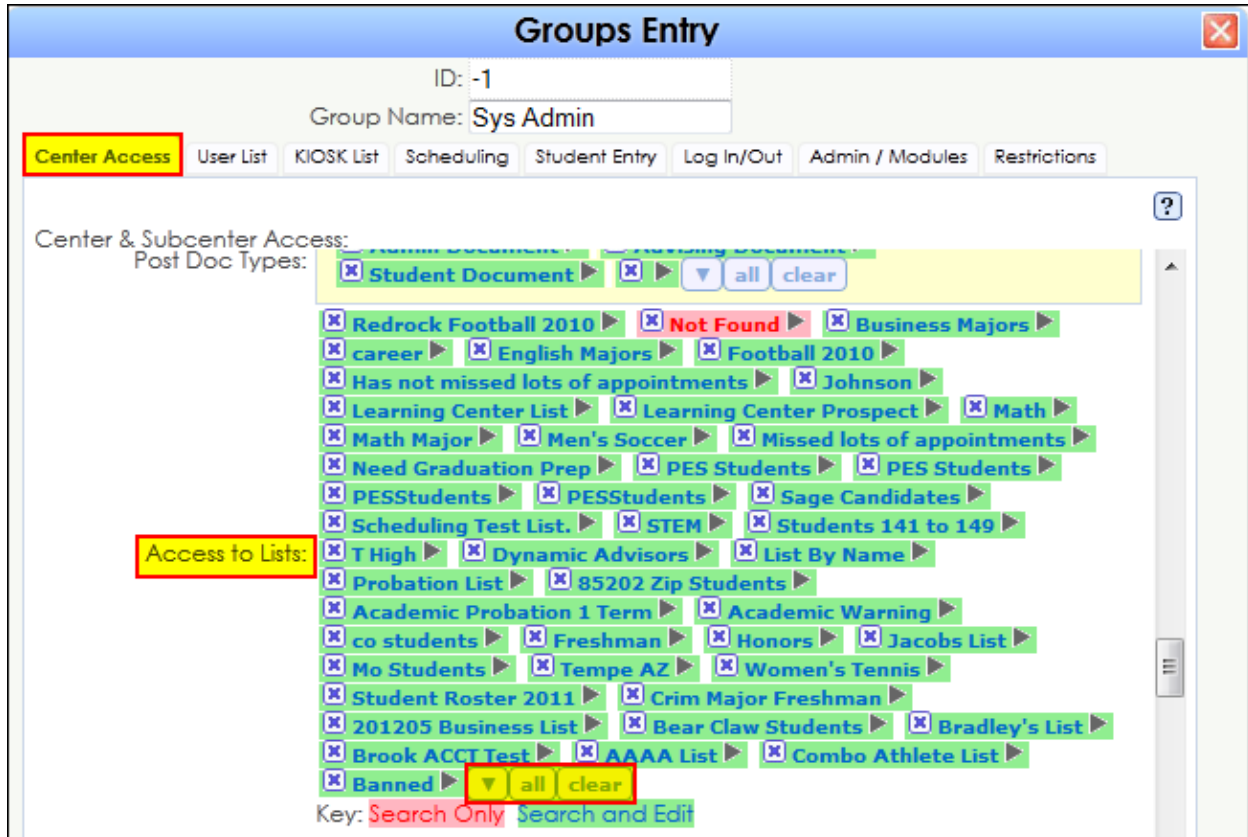
Use the ▼ all clear buttons to add a single list, add all lists or clear all lists to a group's access privileges. Click on the actual list to change the color coding or access type privileges.

Creating a Static Student List

First find the students (or one of the students) you would like to add to a new static list via Search (See Chapter 19: Tips & Tricks - Search section). Then, from the List Options -> Lists menu, choose Add these to a new List. You will be asked to name the List, enter the name and click OK. The students that are currently listed in the Student Listing screen will be added to the newly created student list.

Modifying a Static Student List

To add additional students to an existing Static Student list, we can generate a new search in the student listings. When we've found our results, select "Add these to List" and select your existing Student list.

Individual students can also be added or removed directly from their Student record. In order to remove a single student form a list or add a student to a list, you must have access to the Full Access screen of the student entry. Open the student record (by clicking the student's ID in the Student Listing screen), then navigate to the *Lists* tab.

- Lists shown in green are static lists where you have editing privileges. Click the x next to the list name to remove the student from the list. You may add a student to a static list by click on the Add to List menu and choosing a list from the list of choices.

- Lists shown in dark blue are lists that are dynamic, they were created via search parameters and therefore the student may not be removed from the list in the same way as static lists.

Creating a Dynamic Student List

To create a new dynamic list, choose the Power Search choice from the List Options menu in the Student Listing screen (see Chapter 19: Tips & Tricks > Power Search for more info). Enter the criteria for the new dynamic list.
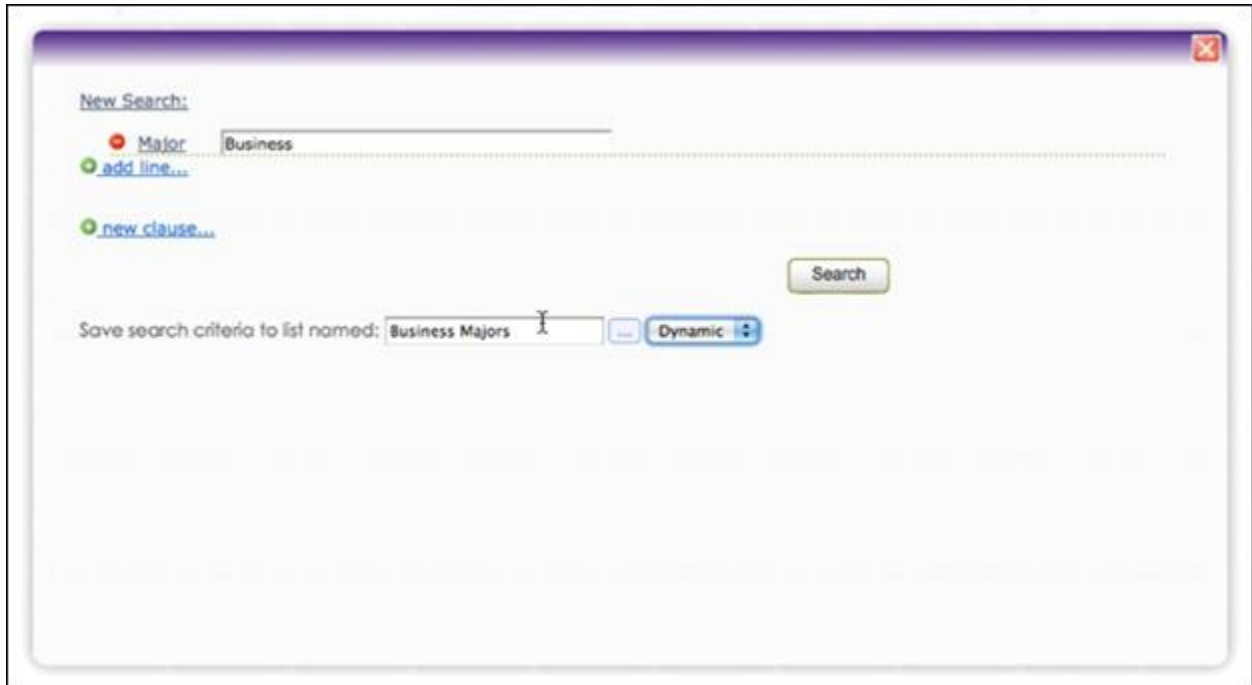
Enter a name for the new dynamic list in the entry field at the bottom of the power search screen and choose Dynamic for the list type. Click *Search* to find the students and create the new dynamic list.

Dynamic Student Lists: Intersections, Unions and Differences

Lists of students may be compared to other lists of students. For example, two lists may be compared to find students that exist in both lists, this is called an intersection (^) between two student lists. One way of describing an intersection is the use of the word 'and' in the definition of search criteria. For example, one list might contain students that are athletes and another list contains students that are eligible for a certain program. To find students that are eligible and are athletes, you would intersect the two lists to find the results.

Unions (+) are used to combine the list of students from one list with the students in another list. One way of describing a union is the the use of the word 'or' in the definition of the criteria. For example if you wanted a list Business Majors or English Majors, you would union the Business Major list with the English Majors list. Another way defining the result is that the Business Majors list is added to the English Majors list.

Differences (-) are used to remove the students in a list from the students in another list. Generally, the word 'not' is used when defining the lists of students using a difference. For example you could find all students that are Business Major but do not have a 4.0 GPA by having two Lists, one of Business Majors and another of 4.0 students. The result would be defined as Business Majors minus the 4.0 students. Another way of describing the result would be to say Business Majors that are NOT 4.0 Students.

List Management
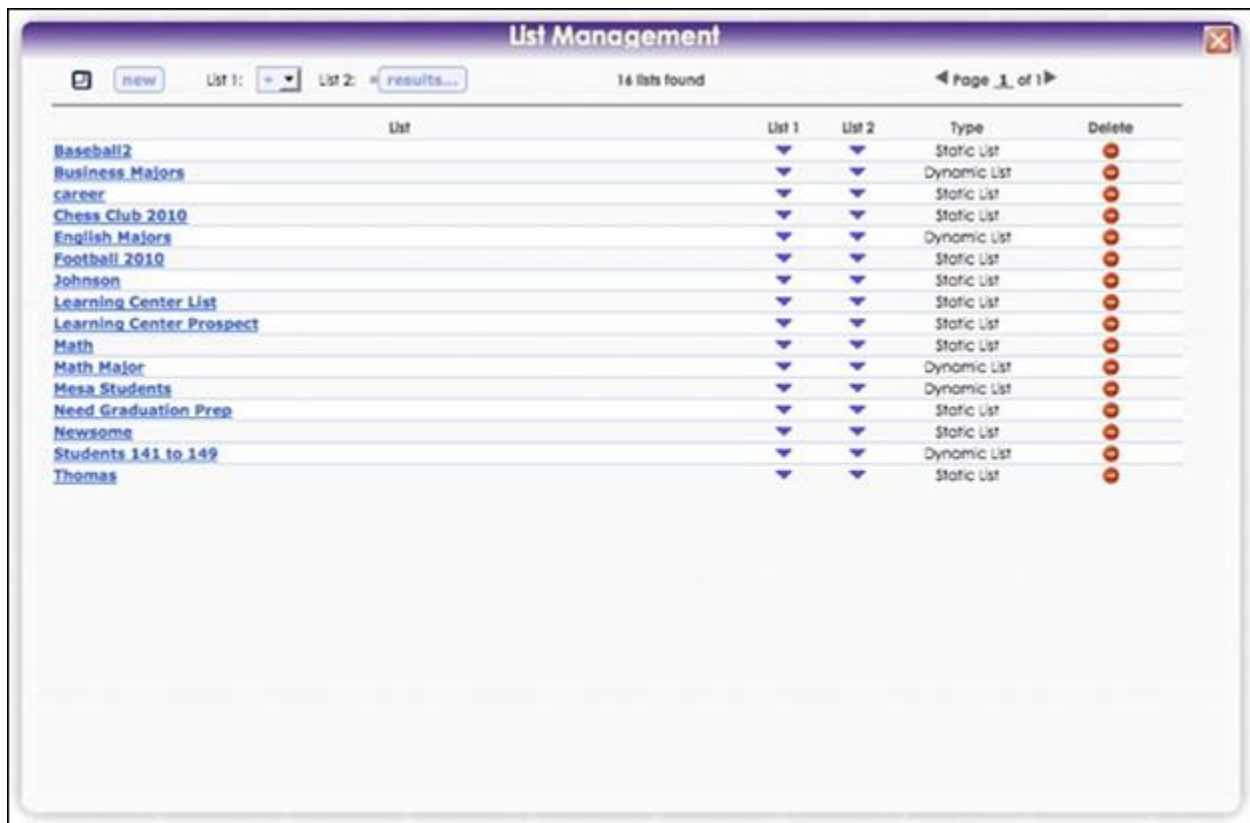
The Trac system has a method for quickly making a comparison between two lists. Choose List Management from the Lists menu under List Options. In the window that appears you may view all the lists you have access to. At the top are place holders for two lists and an operation to perform on the two lists (^, + or -). View the result of the operation by clicking the results button. To choose what the two lists are, click on the downward pointing triangle in the List 1 or List 2 column for the lists that you would like to choose. After choosing two lists and an operation, click Results.

The student listing will then display the students that represent the intersection, union, or difference between the two student lists.

Watchlist Indicators

Students added to a List can then be added to a Watchlist, which can help visually organize and separate groups of students that require special attention. A color coded dot can be assigned for each list to differentiate between classifications, and watchlist status can be displayed on the Log listing, during the log in/out process, on the student record, in the student listing, and in appointment records.

To create and modify your Watchlists, navigate as an Administrator to your Utilities & Prefs. Select the System Prefs tab and in the search field type "Watch" and hit enter or return to perform the search.
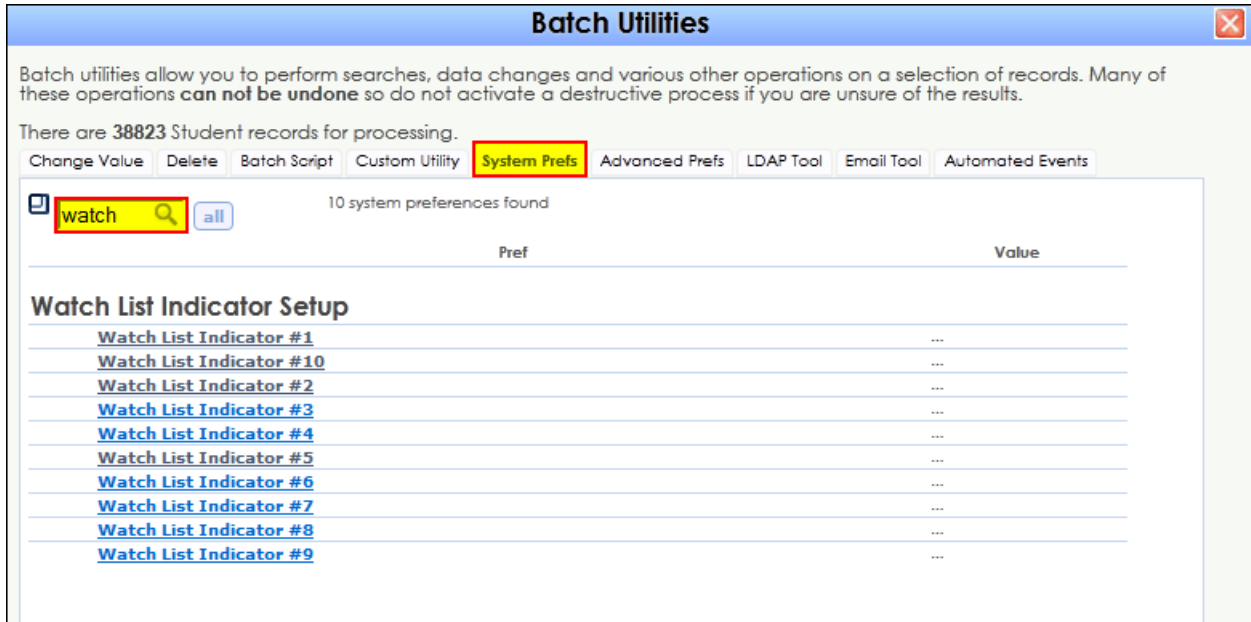
You can create up to ten watchlists to highlight or differentiate a variety of criteria. Click on the Watch List Indicator #1 preference to modify your first Watchlist.
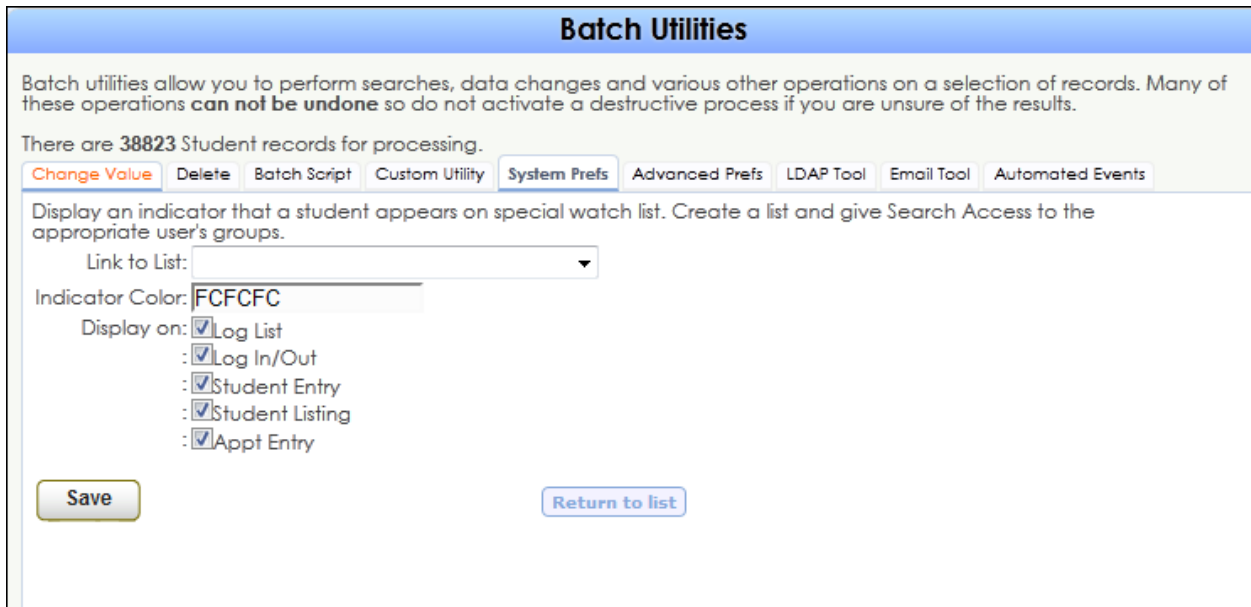
Here we will need to link this Watchlist to an existing List, whether dynamic or static. We can then select a color for the watchlist, and we can also choose which areas the watchlist indicator will appear in. Click *Save* to save your watchlist.

On the Log Listing:

During the Log in / Out process

In the Student Entry record:

In the Student Listings:

In the Appointment Entry Record:

NumWatchLists Preference

There is a system preference entitled "NumWatchLists", located in the System Prefs tab of your Utilities & Prefs, that determines how many watchlists are Active. You may need to modify this preference to enable more active Watchlists.

Batch Utilities

Batch utilities allow you to perform searches, data changes and various other operations on a selection of records. Many of these operations **can not be undone** so do not activate a destructive process if you are unsure of the results.

There are **0** Visit records for processing.

Change Value   Delete   Batch Script   Custom Utility   **System Prefs**   Advanced Prefs   LDAP Tool   Email Tool   Automated Events

@watch 🔍 all   12 system preferences found

Pref	Value	
Watch List Indicator Setup		
NumWatchLists	5	
recomputeWatchAfterSave		
Watch List Indicator #1	... No Class	🔴
Watch List Indicator #10	... Honors	🟡
Watch List Indicator #2	... Football 2010	🟢
Watch List Indicator #3	...	
Watch List Indicator #4	...	
Watch List Indicator #5	...	
Watch List Indicator #6	...	
Watch List Indicator #7	...	
Watch List Indicator #8	...	
Watch List Indicator #9	...	

Batch Utilities

Batch utilities allow you to perform searches, data changes and various other operations on a selec these operations **can not be undone** so do not activate a destructive process if you are unsure of th

There are **0** Visit records for processing.

Change Value   Delete   Batch Script   Custom Utility   **System Prefs**   Advanced Prefs   LDAP Tool   Email Tool

NumWatchLists   **Return to list**
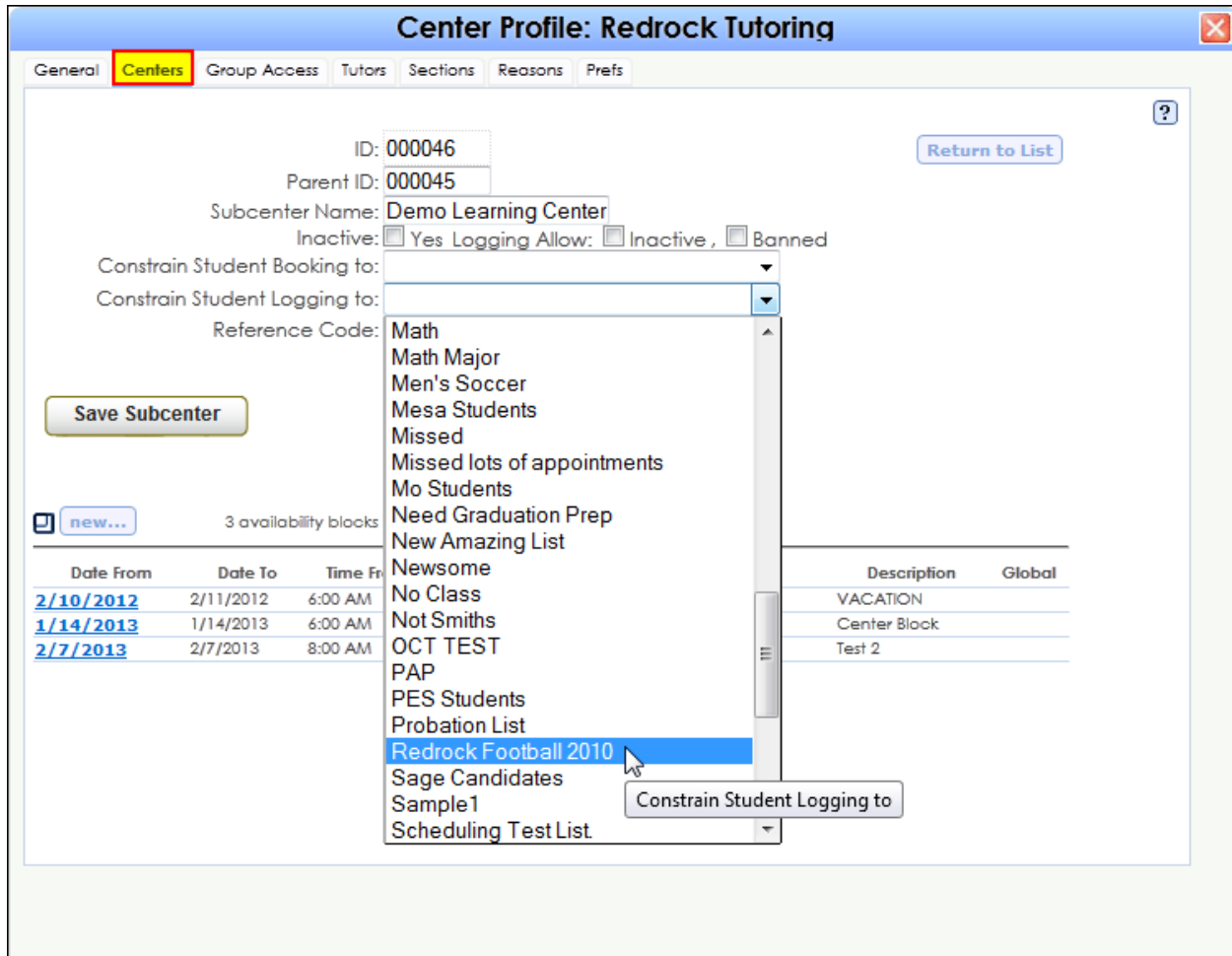
How many active watch lists?

```
10
```

Save   Delete

Constraining Logins based on Lists

- Centers may require that only certain students are allowed to log a visit to the center. This can be done by adjusting the preference in the subcenter entry screen to constrain logging visits to students from a certain static or dynamic list.

In your **Center Profile > Centers** Tab, click on the Subcenter you want to constrain logins for. Click on the *Constrain Student Logging to* dropdown menu to select an existing list.

After you've selected a list, click *Save* Subcenter to save the latest changes. Now, only students on the list that you chose will be able to log in to the subcenter in selection.

The same restriction or constraint may be placed for a subcenter in regards to booking appointments. If you would like to ONLY allow students who are on a list to book appointments, click the *Constrain Student Booking to* dropdown menu and select the list.

List Management: Running Reports based on Lists

If a user has the appropriate privileges, reports can be run based on student lists. Let's navigate to the *Report Chooser* to go through an example. Click on the *TracMan icon > Reports*.

In the *Student by* category is a report entitled *Visits / Students By* ??.

Click on the blue **Student Search...** hyperlink to expand the field.

Select a student list using the *"On List"* field.
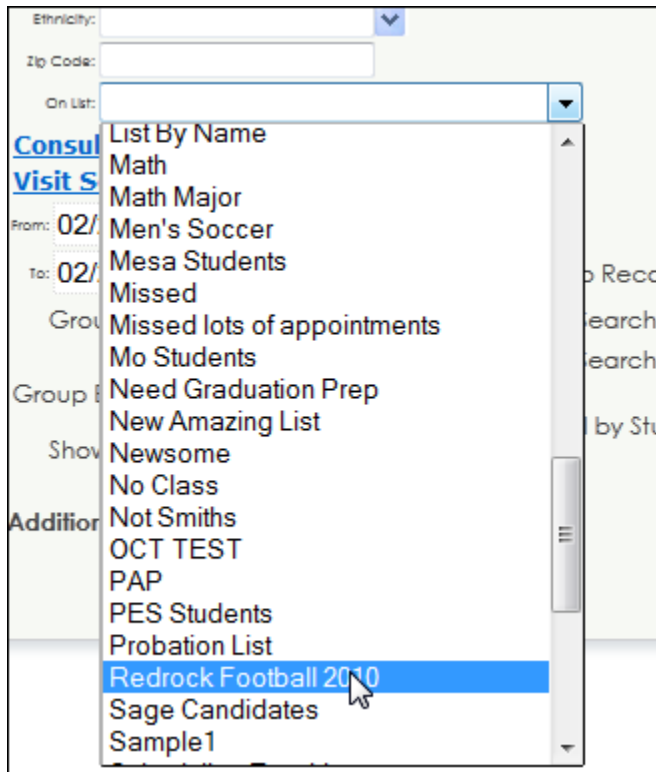
This process can be used in many different reports to run reports based on a student list.

Here are some other reports that allow the utilization of lists:

- **Scheduling**
  - Appointments / Students by ??

- **Center Usage / Demographics**
  - Center Usage & Demographics By

- **Students By**
  - Visits for Students
  - Visits / Students by ??
  - Appointments / Students by ??
  - Students by Center Grid
  - Students / Visits by ??
  - Students Visits Cleanup Data
  - Students by Appointment Status

- **Registrations By**
  - Registrations by ??
  - Progress Report Listing
  - Progress Report & Visit Info

- Progress Report Listing by Subject
- Progress Report & Visit Info by Subject
- Progress Report Detail by Student
- Visits by Instructor & Subject
- SI Comparison
- SI Session Listing

- **Other**
  - Visits for Students
  - Visits Export
  - Center Usage & Demographics by
  - Students Document Followup List
  - Students Document Post List

Chapter 15: Kiosks
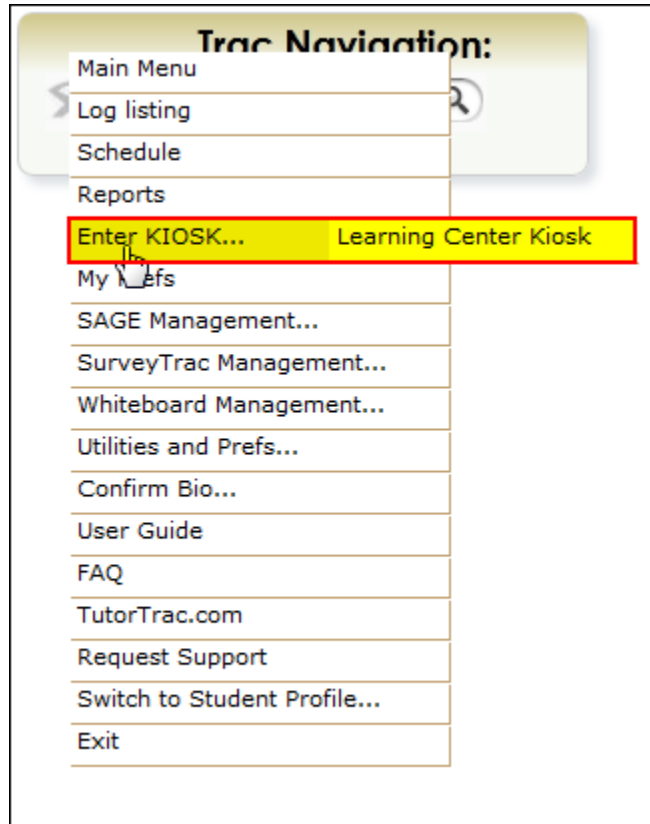
Kiosks, or student sign in stations, can be setup at your Centers to facilitate an efficient login / logout process. If having Front Desk Staff sign students in is not a feasible option, Kiosks can be an effective alternative to recording accurate Visit data.

A Kiosk account provides your users with a sign-in station that that can run autonomously. Students can sign into a Kiosk station when arriving and departing their visit. The Kiosk Station does not have to be staffed in the conventional sense and does not need to be actively overseen by a staff member. Because a Kiosk account is primarily used by Students, access is very restricted. From a Kiosk a student may

- Log in for a Visit
- Log out of a Visit

The Kiosk is not used for any other activity and as a result students cannot access any confidential information from the KIOSK mode.

Kiosk: Group Access Preferences

Kiosks are created within the Group Access Preferences. Any User assigned to the same Group as a Kiosk can switch to Kiosk mode. A User (this might be an administrator, coordinator, supervisor, front desk staff, student worker, etc.) can log into the student sign-in station with their own account, and then switch to Kiosk mode from the Trac Navigation Menu by clicking on the TracMan icon.

Before we create a Kiosk, we must first make sure that the Group we are creating the Kiosk for has the appropriate preferences activated. Navigate to your *Group Access Tab* by opening your *Center Profile* and selecting your *Center Profile*. Select the *Group Access Tab*.
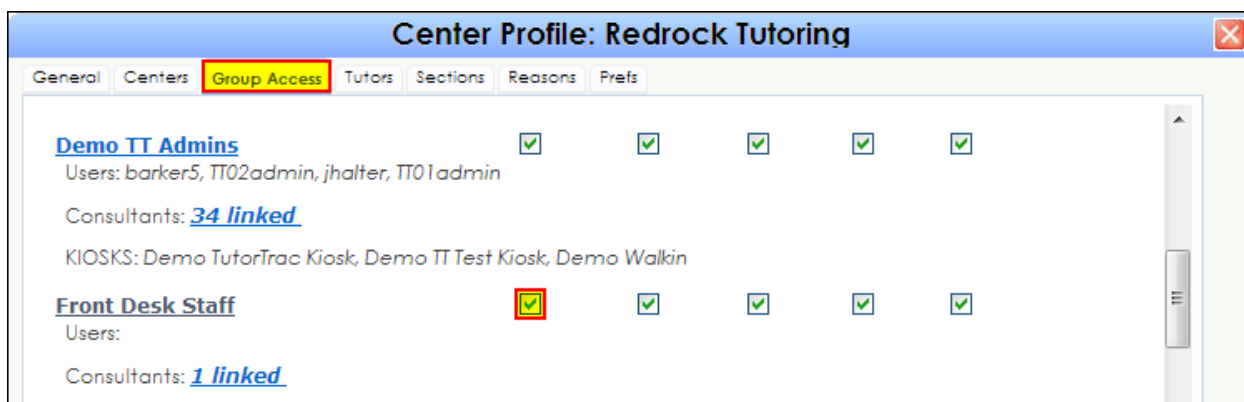
Make sure that the first checkbox (Log Visits To) is activated for the Group in Selection (for this example, Front Desk Staff). This checkbox must first be activated in order for the preferences that we need to activate in the future to be functional. Now select the Group of your choice (for this example Front Desk Staff). Click on your Group's name to open the preferences for that group. The first tab selected will be the *Center Access Tab*. Here we will need to add the appropriate subcenter(s) to the *Log Visits To* category.
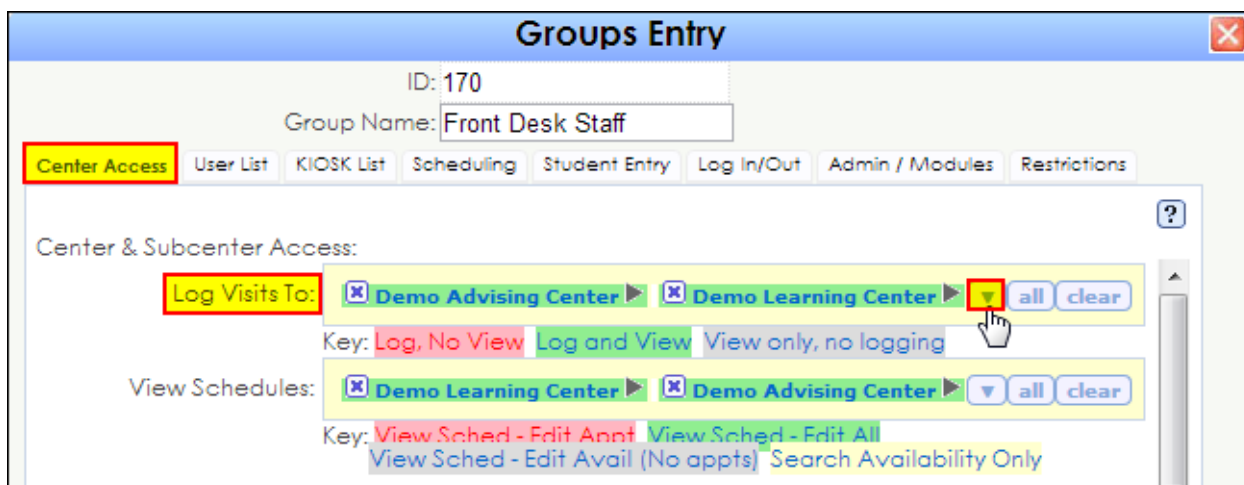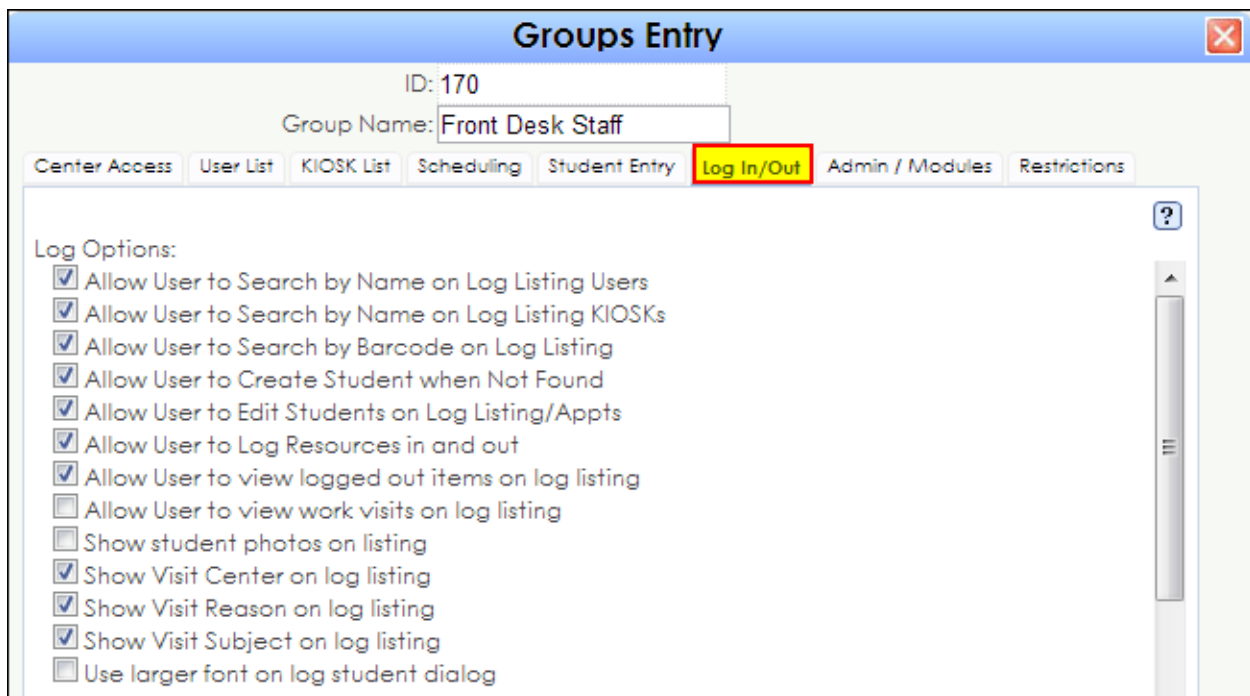
In the *Log Visits To* category, click on the blue dropdown arrow ▼ next to the all and clear buttons. Select the appropriate subcenter for your Kiosk, and make sure it is coded in the Green color (Log and View). To change the coding of a subcenter, simply click on the subcenter name to toggle between the various codes detailed within the Key.

Kiosk settings: Tech Info

Reasons are contained within your **Center Profiles**, so hover over the search glass icon on the right hand side of the Trac Navigation bar (top left corner of Main Menu) and choose **Center Profiles**. Click on your Center Profile.

Then, navigate to the *Log In/Out* tab. The *Log In/Out* Tab contains some preferences that control some options in regards to your Kiosk.

Allow User to Search by Name on Log Listing KIOSKs will allow users to type their name into the Log Student window in order to log in (as opposed to ID number).

Allow User to Search by Barcode on Log Listing allows users to search via Barcode number in the Log Student window to log in. This preference is required if you are using a Barcode Scanner or Card Reader (Contact Redrock support for more details in regards to Barcode scanners – support@go-redrock.com)

Allow User to Create Student when Not Found allows users to create a new student profile if an ID number or search for Name returns with no results (or does not exist).

Creating a Kiosk

Now that we've set the necessary preferences, we can create a Kiosk account. To do this, within your Group Entry Preferences, navigate to the Kiosk List tab for your selected Group. Here we can click on Create New to begin the process of creating a Kiosk.
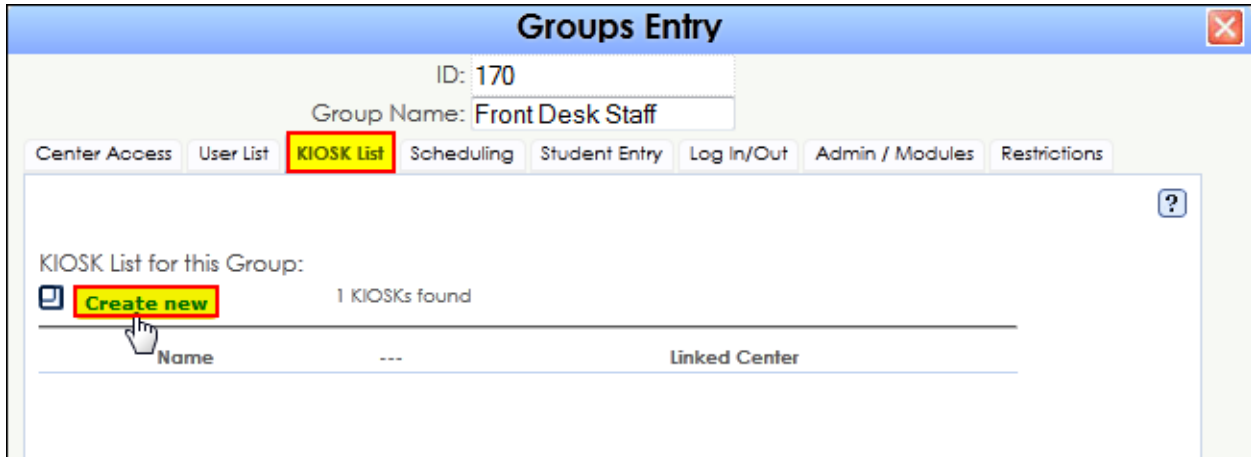
First type a name for your Kiosk in the *KIOSK Name* field.
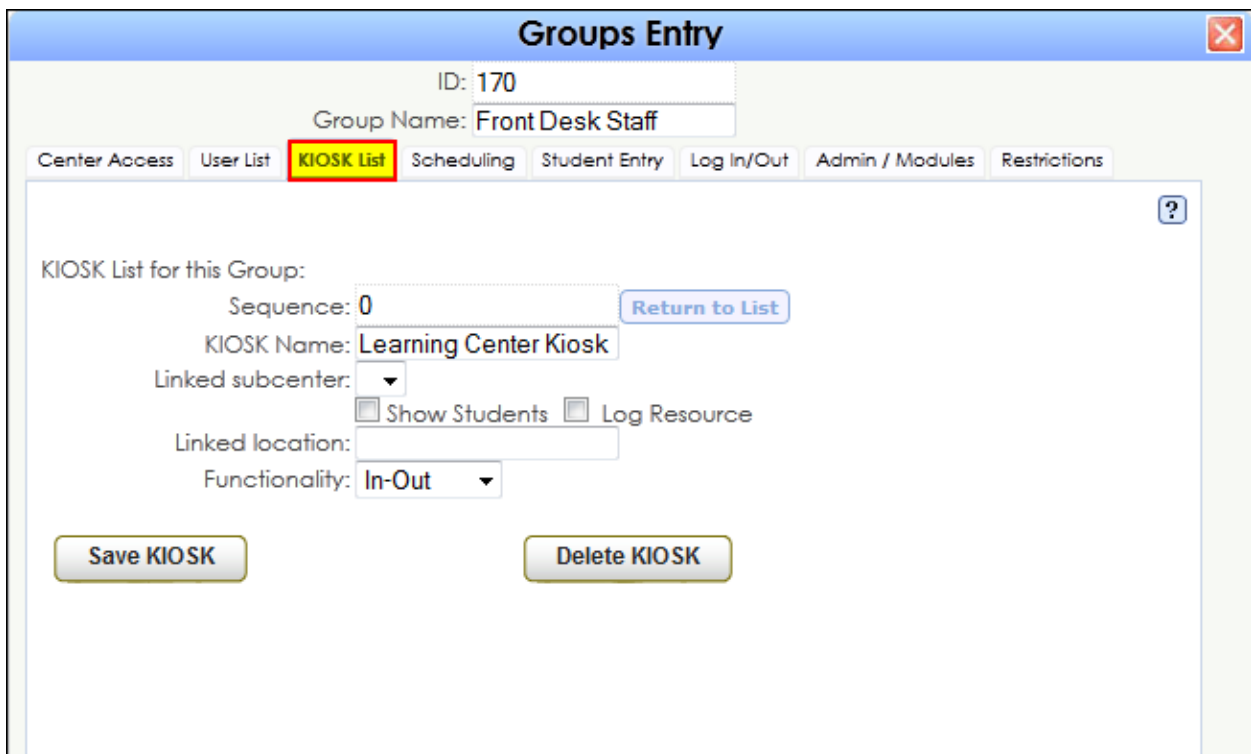
Once you've named your Kiosk, we will need to click *Save KIOSK* before we further modify its settings. After saving your KIOSK, click on your KIOSK name.
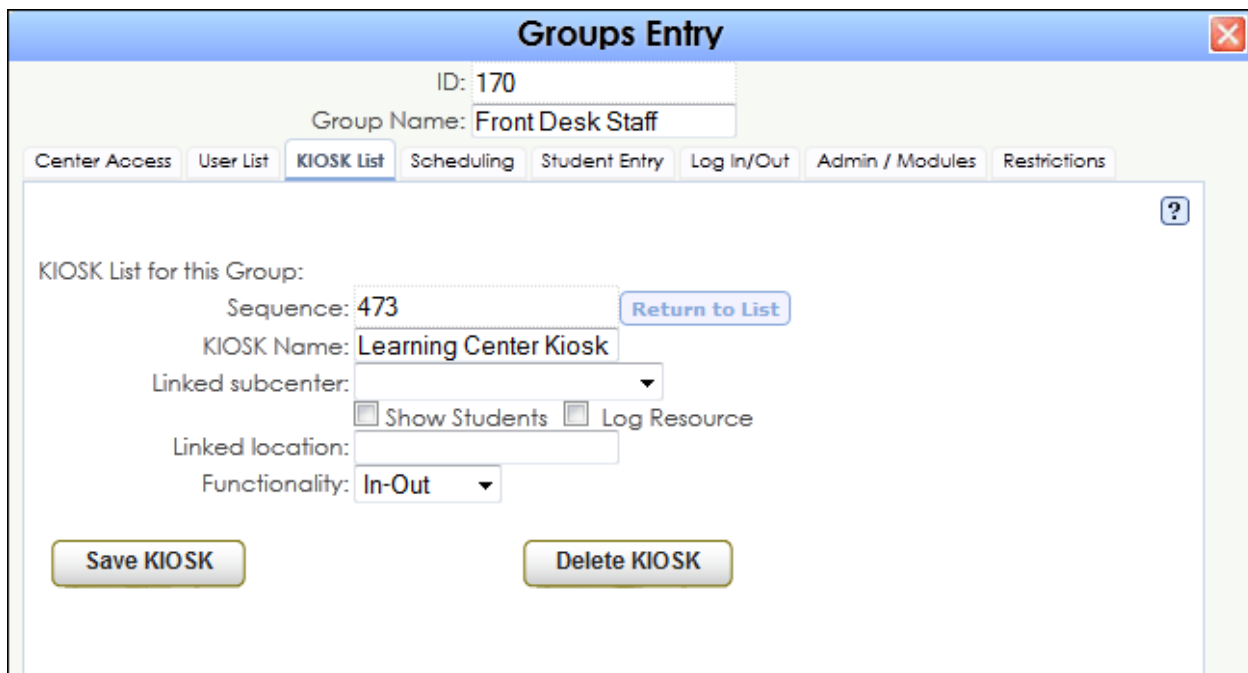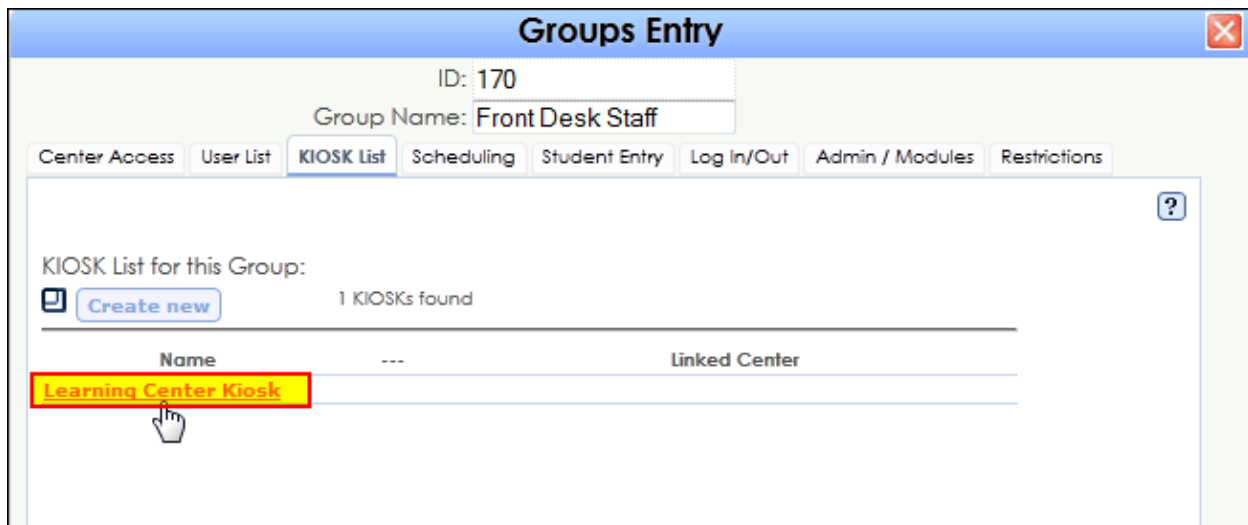
At this point, you have the option of Assigning the Kiosk to a specific Center through the *Linked subcenter* function. You can do this by clicking on the dropdown arrow next to the *Linked subcenter* field, and indicating the Center in the Assigned Center preference. Now Students that sign in through the Kiosk will always be signed in to the Assigned Center.

The *Show Students* preference if activated will display students' full names after they log in. This preference will also allow students to log themselves out by clicking on their own name (as opposed to swiping their ID again).

The *Log Resource* preference will display the Log Resource window if activated, allowing students to check out resources as needed.

We can also link the Kiosk to a Location through the *Linked location* field. This will be dependent on the Locations that you've defined in your Center Profile Prefs: Scheduling Tab (*See Chapter 3: Setup – Prefs > Appointment Status & Management section*). Type in the appropriate location in the *Linked Location* field to assign a Location to your Kiosk.

The Functionality drop down menu allows a User to set the major logging functions of the Kiosk. Through the functionality preference, we can determine whether our newly created Kiosk will be Logging students in AND out, only logging students in, only logging students out, or putting students on a Wait list.
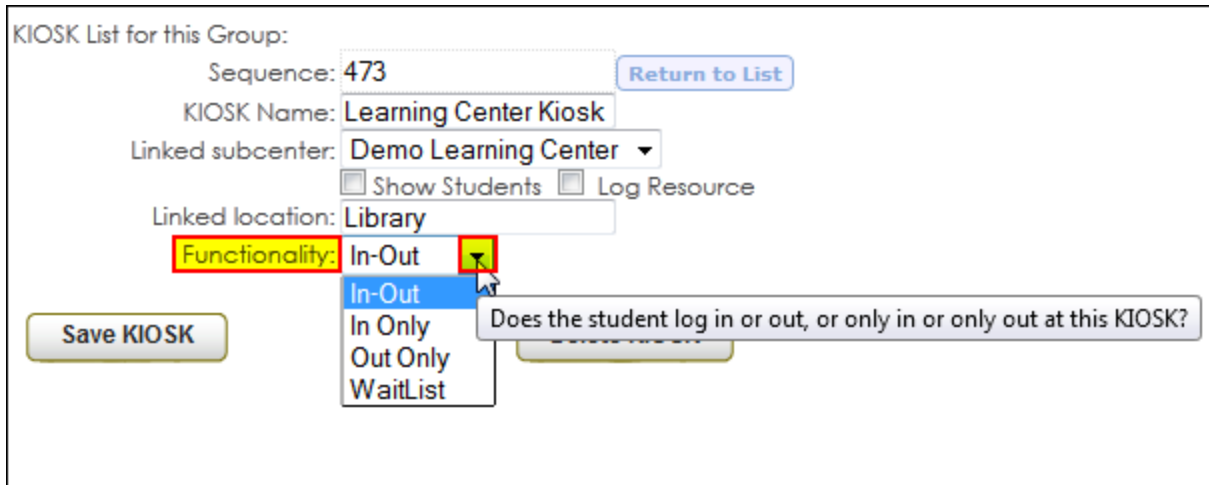
The Wait List function is most commonly used in AdvisorTrac to differentiate Visit time from Wait Time. A typical scenario occurs when a Student logs in to your center and is assigned to the "First Available" Consultant. The system then records this student's "Wait Time". As soon as a Front Desk Staff member or Consultant assigns a Consultant to the student, the student is taken off of the Wait list and the system begins recording Actual Visit Time. Setting your Kiosk functionality to *WaitList* will not allow students to log in or log out, rather, only students who are on the Wait List will be displayed.
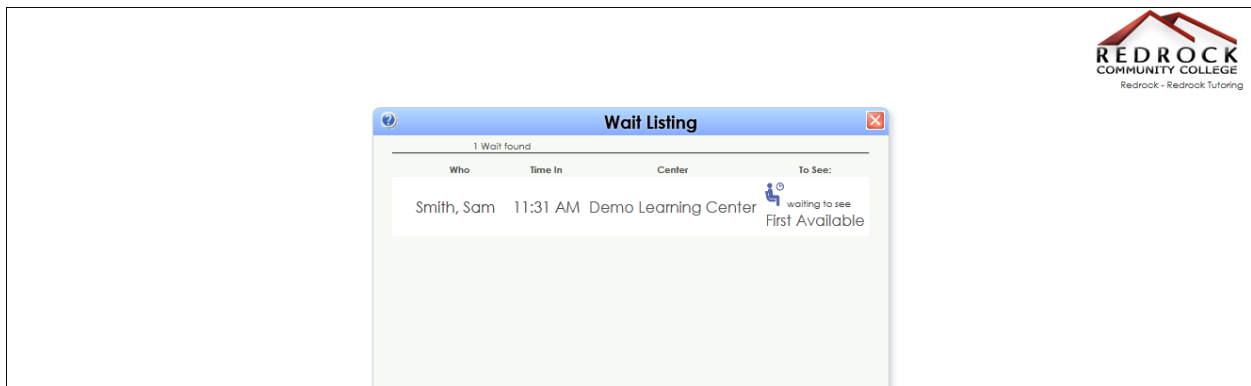
Enter the Kiosk

Users that are assigned to the Group containing the Kiosk will then be able to log in to the designated computer using their credentials. Once they do, they can click on the Trac Man icon, and select Enter Kiosk. Once they have designated which Kiosk to Enter, the system will log the application in to that Kiosk account.

Chapter 16: Customize My Trac System

How to Customize the Default Login Screen

You can customize the default login screen. Your Campus Name can appear onscreen throughout your Trac system. You can send a message to all users and provide instructions to log in. A Campus section provides a custom help link and message. The window colors can default to your school colors, and your school logo can appear in the upper-right corner of all pages. Each of these settings are global and accessible to the Sys Admin Group through the Utilities and Prefs.

Log in to your Trac system as a Sys Admin and navigate to the Utilities and Prefs... and choose the second tab, System Prefs.

To see your changes take immediate effect, we recommend that you open your Trac system in two separate browser windows or tabs. Log in to your Trac system with one browser window, but leave the second window at the default login page. After saving a change through your System Prefs, then refresh/reload your default login page to see the change as it appears onscreen.

Click on the *MsgsAll* link to create or edit an HTML message on the default login screen. Enter your custom message in the Data field and click to Save your message. You may format the message with HTML tags to bold, italicize, or underline your text. You can also format the color or add links to the message for the users that visit this page.

Click on the *CampusName* link to edit the Campus Name that will appear in the upper-right corner of every page in the Trac system, each report, and also in the Campus Information in the upper-left corner of your default login screen.

Click on the *LoginLinkData* link to create or edit a campus specific message and a help link for your users on the default login screen. The help link can be a web link (http) or it can be an email link (mailto). The message is entered with a WYSIWYG editor to help you format the display of your message.

Click on the *cc* link to set the default title bar background color for the Trac system windows. All users working in the Trac system will see this color on the window title bars. This may take some experimenting to get a color that you like. Most institutions will set the color to match a school color.

Click on the *ct* link to set the default title bar text color for the Trac system windows. All users working in the Trac system will see this color on the text of the window title bars. This may take some experimenting to get a color that you like. Most institutions will set the color to match a school color.

Logo
Your Trac system will display your School Logo in the upper-right corner of each page. The Trac system will load the file automatically when it is in place on the server. The file needs to be in GIF format and named SchoolBanner.gif and placed in your TracWeb40 folder. The TracWeb40 folder is in the

Webfolder of your Trac installation directory. If your Trac product was installed in the C:\Trac directory, then the SchoolBanner.gif file needs to be placed in the C:\Trac\Webfolder\TracWeb40 folder. If your Trac system is installed on a Mac, then the installation folder might be HD:Applications:Trac, then the SchoolBanner.gif file needs to be placed in the HD:Applications:Trac:Webfolder:TracWeb40 folder. The recommended size of your image is a maximum height of 75 pixels and maximum width of 350 pixels. These are simply recommendations and you can upload an image of another size, but it may shift some of the other items onscreen.

The following preferences are located in the Advanced Prefs Tab of your Utilities & Prefs and can also add to a customized feel for your Trac system. Keep in mind that some may need to be created, if they do not already exist by default.

campusboxShow
The default login screen can contain a campus information box to the left of the login window. The campusboxShow setting allows you to enter a value of No to hide the campus information box.

campusboxTitle
If the campus information box is showing on the default login screen, you can also set the title of the box. The default title is simply 'Campus'. Enter another title into the value for this preference to rename the campus information box.

CampusCSS
The colors of the Trac system are highly customizable by default; however, some may wish to be more advanced with their customizations of the look and feel to the Trac application. The default Trac application style sheets may be overridden with custom campus information entered in the CampusCSS preference. Contact Redrock Software Corporation for assistance on entering the correct styles.

LABEL:Password
The password field on the default login screen is simply titled 'Password'. Modify the LABEL:Password setting to change the title of the password field on the default login screen.

LABEL:UserName
The username field on the default login screen is simply titled 'User Name'. Modify the LABEL:UserName setting to change the title of the username field on the default login screen.

How to Customize my Main Menu

Users and Consultants can customize their Main Menu. Each user (administrator or staff) and consultant can add links to the main features of the Trac system: Reports, Calendar, and Log Listing. Additional options may also be added to the Main Menu, such as a Tip of the Week from Redrock Software and a custom RSS News Feed. Log Student and Log Resource windows can be added to the top of the Trac system for the user to access those features from any page in the Trac system. Log in to the Trac system and navigate to the **My Prefs**.

From the Trac Navigation Bar, click on the Track Man icon and select MyPrefs.

My Preferences Entry

Main Menu Options:
(seq #:553)
undefined

☑ Quick Reports
☑ Calendar
☑ Mini Log List
☑ Quick Visit
☑ Attendance
☑ Tip of the Week
☐ Wizard
☑ Color Picker [Change color]
☐ Center Status
☐ News Feed
Feed URI: http://news.search.yahoo.com/news/rss?p=Education&ei=UTF-8&fl=

Every Page:

☑ AdvisorTrac Ticker Sound On
☑ Log Student (at top of every page)
☑ Log Resource (at top of every page)

Scheduling:

Schedule Start time: 6:00a 🕐 End time: 7:00p 🕐

Log Listing:

☐ Remember Last Search Criteria

[Save Prefs]

After you make your changes and click to Save Prefs, the window will close and your Main Menu will refresh with your new options. If you have selected an option on your My Prefs settings and it does not appear on your Main Menu, then you need to check the settings of your assigned Group. Let's review the available options for your users starting in the lower-left corner and moving clockwise around the Main Menu.

The **Mini Log List** is available to users/consultants that can view visits and log students in and out of visits. As its name indicates, the Mini Log List is a miniature version of the full Log Listing, which displays a list of the students that are currently signed in to receive assistance. As students sign in for a visit, they appear on the list; as they sign out, they are removed from the list. You can sign a student in for a visit directly from the Mini Log List. You need a Student ID, Barcode, Username, or Full Name to sign a student in or out of a visit.

The **Quick Visit link** is available to users/consultants that can view/create visits. This option allows a user to manually enter a visit for a student. This is typically utilized in a decentralized environment when the students meet with consultants in various locations across campus, such as classrooms, offices, or study rooms. The consultant would need to record the visit manually, either at the time of the visit, or at a later time.

The **Calendar** links are available to users/consultants that are allowed to view and edit the schedule. Some users might only be allowed to use the Search Availability screen to schedule appointments. Some users will be able to access the full schedule with the ability to manage the schedules for the consultants. The view and access of the schedule is controlled by the Group to which the user/consultant is assigned.

The **Quick Reports** options will be available to the users/consultants that are allowed to run reports. The access to run reports is controlled by the assigned Group of this user/consultant. The links allow the user to run a standard report from the Report Chooser or to generate a custom report.

The **Log Student** window can appear at the top of every page in your Trac system. If your user is allowed to sign students in and out of visits, then they can add this window so they do not need to go to the Log Listing each time that they need to sign a student in or out of a visit.

The **Log Resource** window can also appear at the top of every page in your Trac system.

The **Tip of the Week** can appear on the right side of your Main Menu. This weekly tip is updated by Redrock Software through our wiki site, http://wiki.go-redrock.com. If your users displays the Tip of the Week, then they can also navigate the past tips. Simply click on a tip to open the full article at the Redrock Wiki site.

The **Lemming's Color Tool** allows the user/consultant to choose their own personal color scheme for the Trac system. It has taken some years to get to this point in development, but sometimes you have to bow to the pressure of the group...if the group that you belong to stresses the importance of wearing a certain color and singing ditties known as "fight songs", well, for the safety of yourself and others, wear the color...and sing loud.

Chapter 17: Trac 4.0 Standard Reports

Descriptions and Examples
VERSION 4.0

Modified 02/2013

Adding a Favorite Report

To add a specific report into your Favorites Category click on *Reports* from your Trac system's Main Menu. On the Reports Chooser, select the report that will be added in the Favorites Category. After selecting the Report, click on the option *"Save new favorite with name."* Then change the title to add the report to your Favorites Category. Then click on the *Generate* button to save the Favorite Report.

;

Edit / Update a Favorite Report

To edit/update the report in the Favorites Category click on *Reports* from your Trac system's Main Menu (or go to TracMan > Reports). In the Reports Chooser, select the report in the Favorites Category that will be modified. Make the changes, then click on the option *"Save over existing favorite with name."* Change the title to match your report in the Favorites Category, and then click on the *Generate* button to save all changes.

Removing a Report

To remove the report in the Favorites Category click on *Reports* from your Trac system's Main Menu. In the Reports Chooser, select the report in the Favorites Category that will be deleted. After selecting the Report, click on the option Remove to delete the report from the Favorites Category.

Nightly / Automated Reports

To run automated reports, you will first need to Save a Favorite Report. Then we will need to create the Automated Event. Go to the Trac Navigation, click the Trac man Icon, then to *Utilities and Prefs* and select the *Automated Events* tab. You will need to create your daily, weekly or monthly events by clicking on the NEW button. In the Event Entry add your Title in the Item Name field (i.e. Daily Report or Weekly Report). The Process name will be "script_autorun". Check the "*is Pending*" field to activate this process, or alternatively after saving activate the checkbox on the far right (Automated Events Tab). Edit the appropriate schedule and time, then finally click *Save*.

To generate the report automatically each night, click on the *Reports* link from your Trac system's Main Menu (or TracMan > Reports). In the Report Chooser, choose your Favorites Category, and then select the report in the Favorites Category that will be automatically run every night. After selecting the Report, click on the blue *Auto run* button and choose the Automated Event you created to generate the report automatically each night from the Favorites Category. Make sure that after your Auto run selection is made, you save the Report by checking the "*Save over existing Favorite*" checkbox. For each Automated Report that you would like to run, we need to create an Automated Event.
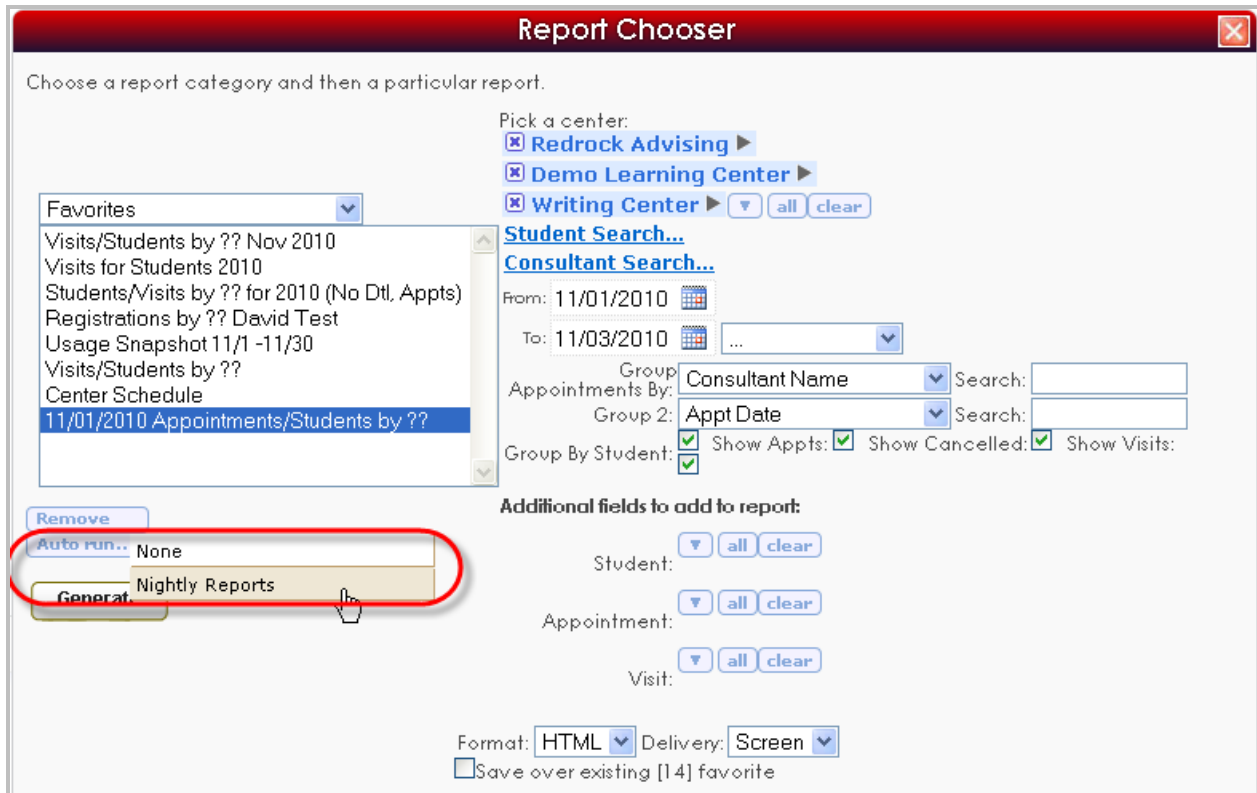
Generating Reports

GENERATE THE REPORT: To generate all of the following Reports, you can either select the *"Reports"* option from the TracMan icon or click on the "Reports" shortcut link located on your Trac system's Main Menu (just underneath the Trac Navigation Bar). In the Report Chooser, select the appropriate group of reports from the pull down list of available categories. After selecting your category, choose the specific report as it loads in the menu beneath. After filling in the necessary criteria as it loads on the right, click on the *Generate* button to generate the report.

Scheduling: Appointments/Students by ??

The *Appointments/Students by ??* report displays Appointment data for your subcenter(s). Information can be organized and sorted via the "Group Appointment By" and "Group 2" fields. For each group selected, the dates and times are listed as well as Appointment status (attended, cancelled, missed), student, and subject. The report can be regenerated for a specific center, an individual student, group of students, an individual Consultant, or for different date and time ranges. Additional fields can be added with regards to Student, Appointment, and Visit Information.

Scheduling: Center Schedule

The *Center Schedule* shows a quick view of the schedule for all centers and consultants. It is first listed according to the date. For each date, the centers are listed, and for each center, there is a list of the consultants with their schedule. A quick look at the schedule can be also generated for a specific center or an individual consultant through the *Center Schedule* Report.

Scheduling: Dates By Tutors

The *Dates by Tutor* Report shows a grid view of the schedule for the chosen dates of all the tutors. For each tutor, the dates are listed across the top and the times of day are listed vertically on the left. A grid depicts the appointment and available times for the tutor for each day in the grid. The grid schedule can be regenerated for a specific center, an individual tutor, or for different date and time ranges.

Scheduling: Tutors By Date

The *Tutors by Date* Report shows a grid view of the schedule for all tutors listed according to the date. For each date, the tutors are listed across the top, and the times of day are listed vertically on the left. A grid depicts the appointment and available times for each tutor. The grid schedule can be regenerated for a specific center, an individual tutor, or for different date and time ranges.

Scheduling: Appointment List

The *Appointment List* Report displays the students that had an appointment within the date range, the center, consultant, the course/subject, and the status of the appointment.

Scheduling: Availability Search

The *Availability Search* quickly displays the Consultants Availability for the selected Center and date range, similar to the Search for Availability function.

Scheduling: Group Rosters

The Group Rosters report will display Group Attendance for SI sessions or Multi-Group appointments. The report will display a list of students with 2 columns: one for students who Attended and one for students who Cancelled. You can modify the Date Range, Time of Session, add additional fields for consultants and students, and add page breaks within the report.

Scheduling: Students and Appointments Status Cross Tab

The *Students and Appointments Status Cross* Tab Report populates a list of students who have made appointments, and displays all respective appointment statuses. Appointments can be sorted by student Name, ID, or Number of Appointments. Any Appointment Status that has been set within your system can be defined in the *Appt Statuses* field (separated by a return/enter character), and will be displayed through this report per appointment in column format.

Scheduling: Consultant Appointments/Visits

The *Consultant Appointments/Visits* Report displays the students the consultant saw and the time they worked together. The report does not account for the login hours, or reserved time, but only calculates total student hours with this consultant. The consultants are listed vertically on the left side of the screen, and the columns display the students who worked with the consultant on which days, at what times, for how long and the resulting statuses of the appointments.

Payroll: Consultant/Work Visits By??

The *Consultant/Work Visits By* Report displays the amount of time a Consultant logged in as consultant for work, and shows the total number of visits and hours for these Work Visits. This report will also calculate total pay amount based on individual Consultant Pay Rate, and can include any Consultant Notes for any Work Visits. Activate the *Include Signature Line* field to display a Signature line on the bottom of the Report (Name, Date).

Payroll: Fund Code Hours

The *Fund Code Hours* report will break up a consultant's work according to the various fund codes associated with each activity. The report totals the hours for the consultant's timecard and funded activities. The *Fund Code Hour*s report is intended to give a breakdown of a consultant's activities and totals for each activity.

Payroll: Consultant Pay by Reason

The *Consultant Pay by Reason* report displays the different work reasons for Consultants, which designates time logged as work. Consultants are listed vertically on the left side of the screen, and each respective reason for these visits are listed along with visit detail, hours, Pay and Rate for each reason.

Payroll: Payroll Summary

The *Payroll Summary* report shows the hourly rate, total hours, total costs, ID numbers and names for ALL consultants at the Subcenter(s) in selection. A signature and date line are included at the bottom of the report.

Payroll: Payroll Hours

The *Payroll Hours* report displays the total number of hours of Work Visits recorded for your consultants. Hours are calculated based upon the consultant logging in and out for Work Visits. This report lists the hours for each date within the chosen date range, and totals them for each consultant.

Payroll: Payroll Hours and Cost

The *Payroll Hours and Cost calculates* Total Compensation for A consultant based upon the consultant's Work Visits and Pay Rate. This report lists the hours for each date in the date range and totals them for each consultant. The total hours for the consultant are then multiplied by the consultant's pay rate in their consultant record.

Payroll: Week Pay by Fund

The *Week Pay by Fund* details a consultant's logged hours over a specified date range based upon Fund. Detailed consultant listings include their login and out times with a total for each day and their pay rate. Dates are organized by their week in the semester, and the total wage for the date range is calculated. Two management signatures are included at the bottom of the report.

Payroll: Week Pay by Fund by Center

The *Week Pay by Fund by Center* details a consultant's logged hours over a specified date range. Detailed consultant listings include their login and out times with a total for each day and their pay rate. Dates are organized by the Centers in the semester, and the total wage for the date range is calculated. Two management signatures are included at the bottom of the report.

Material/Resources: Material Usage Report

The *Material Usage Report* displays the materials that have been checked out over the assigned date range. First organized by resource type, resources are listed with their usage over the date range. Other fields include date/time checked out, date/time returned, student name.

Material/Resources: Material Due In Report

The *Material Due In Report* displays the materials that are now due. First, items are organized by resource type. Next, the resources are listed with their Title, Item ID, due date, student name and ID, and the date/time checked out.

The *Material Usage Total Time* by Report lists the materials that have been checked out over the assigned date range. First organized by resource type, resources are listed with usage data over the date range. Data fields include student name, number of checkouts, and total number of hours the item was checked out for. The report can be regenerated for an individual student through the *Student ID* field, or for another date range.

Material/Resources: Material Usage Total Time by Student Report

The *Material Usage Total Time* by Student Report lists the students that have checked out resources over an assigned date range. First organized by student name, resources are listed with the student's usage over the date range. Fields include the total number of checkouts and total number of hours item was checked out. The report can be regenerated for an individual student or for another date range.

Material/Resources: Resource List

The *Resource List* displays a list of all the materials available through your Trac system. Resources are organized by resource type, resource ID, title, description, and key words.

Redrock Advising
AdvisorTrac

Type	Res ID	Title	Description	Key Words
	1111111111	SASSO	SASSO	SASSO
	book1010	1010	Placed in TSC 304A Fall 03	book1010
	01215908	Aquafina Bottled Water	20 fluid ounces of h20	Water,bottle
	Bio20223	Molecular Biology	A book required for a biology course.	Biology molecular
Book	83 0020	Intro to Basketweaving	Dont have to hold our breath for this one	
	BOOK4	Intro to Differential Equations		
	Time	PTP - Time Management	CSU - Fullerton	Time
	MathA1	PTP - Math Anxiety Reduction # 01	Robert D. Hackworth	MathA

Center Usage/Demographics: Center Usage/Demographics by

The *Center Usage/Demographics by* Report depicts a demographic breakdown of students who have visited your Subcenter(s), grouped by a chosen field. The fields are listed vertically on the left side of the screen, and demographic summaries are detailed along the right side of the screen. Along the top, links to each center allows the user to regenerate the report for an individual center.

Students By: Students that Visited

The *Students that Visited* report will list all students that visited the center(s) in selection within the chosen time period. Each center is listed with the students' id, name, last date in, and center, etc. A total number of students will be listed on the top of the report.

Students By: Students that Visited by Consultant

The *Students that Visited by Consultant* Report will list students according to the consultant they had seen. Consultants are listed to the left and then each student is listed by name, center, date, time and duration. A grand total of visits are calculated for each consultant.

Students By: Consultant/Center Summary

The *Consultant/Center Summary* Report provides an overview for both Visit and Appointment data for your Consultants. Each center is displayed along the left of the table. For each center, the Consultants are listed with their respective number of visits, Appointments, Students, and status of appointments that logged into that particular center. The *Consultant/Center Summary* Report can be regenerated for a specific center or for different date ranges.

Students By: Visits for Students

The *Visits for Students* Report will generate a list of students who have visited your Subcenter(s). Students are sorted by name, date in and time in. The total of students will be listed on the top of the report.

Students By: Visits/Students by??

The *Visits/Students by* Report provides visit data through a variety of fields. Data can be grouped by two fields of your choice through the *Group Visits By* and *Group 2* fields. Additional Fields can include student ID, name, date, times, subject, reason, and visit notes. Total visits and hours are listed beneath each section.

Students By: Appointments/Students By??

The *Appointments/Students by ??* report displays Appointment data for your subcenter(s). Information can be organized and sorted via the "Group Appointment By" and "Group 2" fields. For each group selected, the dates and times are listed as well as Appointment status (attended, cancelled, missed), student, and subject. The report can be regenerated for a specific center, an individual student, group of students, an individual consultant, or for different date and time ranges. Additional fields can be added with regards to Student, Appointment, and Visit Information.

Students By: Students by Center Grid

The *Students by Center Grid* Report displays students according to the center they visited. The centers are listed along the top and the students are listed down the left side of the report. This report will only display students visiting "x" or more centers depending on the value that you input into the *Only List Student visiting:* field.

Students By: Students/Visits by??

The *Students/Visits by Report* will provide a total number of students and visits, grouped by the chosen field on the left. Each field is listed with its associated students, individual student data, number of visits by the student, and total hours of each visit.

Students By: Students Visits Cleanup Data

The *Students Visits Cleanup Data* Report will list student records, sorted by student name and additional fields if selected. You have the option of showing students who have Visited, Not Visited, or ALL students.

Students By: Students by Appointment Status

The *Students by Appointment Status* displays a total number of appointments grouped by the Appointment Status on the left. Each status is listed with the total number of appointments, total visit hours associated with the appointment, and total hours scheduled.

Students Listed: Students List

The *Student List* Report will list student's records, sorted by student name and additional fields if selected. The students are listed with information organized alphabetically.

Registrations: The Registrations by??

The *Registrations by* Report provides Registration or Course Enrollment data through a variety of fields. Data can be grouped by three fields of your choice through the *Group Subjects, Group Sections,* and *Group Registrations* fields. Additional Fields can include subject name, section number, term code, start date, end date, total time, and Total visits, etc...

Registrations: Progress Report Listing

The *Progress Report Listing* allows for a quick overview of the progress reports for students. The listing displays in alphabetical order the student last name, the course, the instructor, the start date, and the grade received.

Progress Report Listing

Student Name	Course	Instructor	Start Date	Grade
Alger, Tanner N	HLTH655001 200920	Haddock, J	00/00/00	A
Bisig, Rachel N	GEOL121001 200920	Haddock, J	00/00/00	A
Bradford, Asiah A	BIOL213002 200920	Haddock, J	00/00/00	A
Brown, Sarah K	FIN331030 200920	Haddock, J	00/00/00	A
Combs, Kimberly R	MATH231030 200920	Haddock, J	00/00/00	A
Dear, Tascha N	CHEM111031 200920	Haddock, J	00/00/00	A
Kuckuck, Ashley F	ENGL230040 200920		00/00/00	A
Kuckuck, Ashley F	ENGL251001 200920	BENNER, MARGARET	00/00/00	A
Leininger, Derek L	ECON306030 200920	KCENICH, STEPHEN	00/00/00	A
McKean, Meagan R	CHEM105001 200920	Smith, Jon	00/00/00	A
Richards, Heather P	PSYC679002 200920	Smith, Jon	00/00/00	A
Shaw, Molly A	EDUC730040 200920	HEATH, MEGAN	00/00/00	A
Welsh, Diana L	ARED464020 200920	MARTENS, RAYMOND	00/00/00	A
Welsh, Diana L	MKTG485001 200920	MILLER, ALLAN	00/00/00	A
Wright, Megan A	ECED612641 200920	MASON, MARIA	00/00/00	A
Wright, Megan A	ECED619040 200920	HUTTON, LAURA	00/00/00	A
Wright, Megan A	PSYC212031 200920	WALLACE, DEVIN	00/00/00	A

Registrations: Progress Report & Visit Info

The *Progress Report & Visit Info* allows for a quick overview of the progress reports with visit info for each student. The listing displays in alphabetical order the student name with ID, the subject, the number of visits, the hours and grade. The report may be generated for an individual student, instructor, or course.

Progress Report & Visit Info

Student		Subject	Visits	Hours	Grade
000-000-144	Alger, Tanner N	HLTH655001 200920	0	0.00	A
000-000-142	Bisig, Rachel N	GEOL121001 200920	0	0.00	A
000-000-146	Bradford, Asiah A	BIOL213002 200920	0	0.00	A
000-000-149	Brown, Sarah K	FIN331030 200920	0	0.00	A
000-000-147	Combs, Kimberly R	MATH231030 200920	0	0.00	A
000-000-143	Dear, Tascha N	CHEM111031 200920	0	0.00	A
000-000-138	Kuckuck, Ashley F	ENGL230040 200920	0	0.00	A
		ENGL251001 200920	0	0.00	A
000-000-136	Leininger, Derek L	ECON306030 200920	0	0.00	A
000-000-153	McKean, Meagan R	CHEM105001 200920	0	0.00	A
000-000-151	Richards, Heather P	PSYC679002 200920	0	0.00	A
000-000-131	Shaw, Molly A	EDUC730623 200920	0	0.00	A
000-000-135	Welsh, Diana L	ARED464020 200920	0	0.00	A
		MKTG485001 200920	0	0.00	A
000-000-134	Wright, Megan A	ECED612641 200920	0	0.00	A
		ECED619040 200920	0	0.00	A
		PSYC212031 200920	0	0.00	A

Registrations: Progress Report Listing by Subject

The *Progress Report Listing* by Subject allows for a quick overview of the progress report subjects. The listing displays in alphabetical order the course name, then the student name, the instructor, the report date and grades. The report may be generated for an individual student, instructor, course or grade.

Progress Report Listing by Subject

Course	Student Name	Instructor	Start Date	Grade
CHEM110002 200920	Bisig, Rachel N	Haddock, J	9/11/2009	B
BIOL214033 200920	Bradford, Asiah A	Haddock, J	9/11/2009	B
MKTG345001 200920	Brown, Sarah K	Haddock, J	9/11/2009	B
MKTG445001 200920	Brown, Sarah K	Haddock, J	9/11/2009	B
ECED665222 200920	Combs, Kimberly R	Haddock, J	9/11/2009	B
FIN331030 200920	Combs, Kimberly R	Haddock, J	9/11/2009	B
EBTM411032 200920	Conner, Katie M	Smith, Jon	9/11/2009	B
PSYC679002 200920	Dear, Tascha N	Haddock, J	9/11/2009	B
ENGL426020 200920	Lash, Christine M	HAHN, H	9/11/2009	B
OCTH435041 200920	Leininger, Derek L		9/11/2009	B
EDUC730623 200920	Nguyen, Jennifer T	PONZILLO, STEVE	9/11/2009	B
FIN331032 200920	Root, Nichole L	Smith, Jon	9/11/2009	B
PSYC212031 200920	Welsh, Diana L	WALLACE, DEVIN	9/11/2009	B
ECED670641 200920	Wright, Megan A	GUERRERO, JUDITH	9/11/2009	B

Registrations: Progress Report & Visit Info by Subject

The *Progress Report & Visit Info by Subject* allows for a quick overview of the progress reports with visit info for each student. The listing displays in alphabetical order of the subject, the student name, the number of visits, and the hours. The report may be generated for an individual student, instructor, course or grade.

Progress Report & Visit Info by Subject

Subject	Student	Visits	Hours	Grade
ARED464020 200920 000-000-135	Welsh, Diana L	0	0.00	A
BIOL213002 200920 000-000-146	Bradford, Asiah A	0	0.00	A
CHEM105001 200920 000-000-153	McKean, Meagan R	0	0.00	A
CHEM111031 200920 000-000-143	Dear, Tascha N	0	0.00	A
ECED612641 200920 000-000-134	Wright, Megan A	0	0.00	A
ECED619040 200920 000-000-134	Wright, Megan A	0	0.00	A
ECON306030 200920 000-000-136	Leininger, Derek L	0	0.00	A
EDUC730623 200920 000-000-131	Shaw, Molly A	0	0.00	A
ENGL230040 200920 000-000-138	Kuckuck, Ashley F	0	0.00	A
ENGL251001 200920 000-000-138	Kuckuck, Ashley F	0	0.00	A
FIN331030 200920 000-000-149	Brown, Sarah K	0	0.00	A
GEOL121001 200920 000-000-142	Bisig, Rachel N	0	0.00	A
HLTH655001 200920 000-000-144	Alger, Tanner N	0	0.00	A
MATH231030 200920 000-000-147	Combs, Kimberly R	0	0.00	A
MKTG485001 200920 000-000-135	Welsh, Diana L	0	0.00	A
PSYC212031 200920 000-000-134	Wright, Megan A	0	0.00	A
PSYC679002 200920 000-000-151	Richards, Heather P	0	0.00	A

Registrations: Progress Report Detail by Student

The *Progress Report Detail by Student* Report allows for a detailed review of the progress reports for each student. The report details are organized in alphabetical order of the student's last name and contain the student ID, course, instructor, report date, grade received, term ID, and notes. The report may be generated for an individual student, instructor, course or grade.

Registrations: Visits by Instructor & Subject

The *Visits by Instructor & Subject* shows instructor names in alphabetical order with their subjects and the students who visited for those subjects underneath. Total number of visits and total hours are displayed for each student.

Registrations: SI Comparison

The *SI Comparison* Report generates a report comparing two groups of students, an SI group and NON SI group. The SI group represents a group of students who have Visited your center for supplemental instruction or extra help, and the non SI group represents the group of students who have not come in for visits. The report compares the grades received by both groups, ultimately illustrating the effect your Centers may be having on certain groups of student population. The *SI Comparison* Report can be run for a specific subcenter(s) or section(s), and grades can be broken down depending on the grading system used by your campus.

Student Support Services
TutorTrac

Grade	SI Group 696		Non SI Group 5269		Total 5965	
Combined	0	.0%	0	.0%	0	.0%
Combined and Grade Point Avg (no withdraws):	0	.0%	0	.0%	0	.0%
Other Ungraded (A,B,C,D)	696	100.0%	5269	100.0%	5965	100.0%

Total Graded Enrollment:	0
Total (A,B,C,D):	5965
Total Enrollment:	5965
Number SI Sessions Attended:	484
Number SI Sessions Not Attended:	0
Total Number SI Session Offered:	484 [view]
Total number and % of Graded Students Attending SI:	0 %
Total Contact Hours of SI Participating Students:	1891.00
Mean Number of (0 minute) Sessions Attended by SI Participants:	2.71
Mean Size of SI Sessions:	1.58

Mean final grade of SI participants w/o Withdrawals:
Mean final grade of Non-SI participants w/o Withdrawals:
Difference from SI to Non-SI group:
Mean final grade of SI participants + Withdrawals:
Mean final grade of Non-SI participants + Withdrawals:

Attendance Affects of SI

Grade	1 to 4	5 to 7	8 or +
	10	0	0
	10	0	0
Total: 10	10	0	0
GPA:	0.00		

363

Registrations: SI Session Listing

The *SI Session Listing* Report shows the date, time, and SI tutor names in alphabetical order with the total number of attended sessions -- with center displaying for each SI Tutor. Grand totals at the end of the report will add Attended versus Non Attended sessions.

Redrock Advising
AdvisorTrac

Sessions Attended

Date	Time	Tutor	Center	# Attended
11/04/10	11:30 AM	Avolano, Frank	General	1
11/08/10	11:00 AM	Avolano, Frank	General	1
11/10/10	11:30 AM	Avolano, Frank	General	2
11/02/10	11:00 AM	FoxAdvisor, George	General	1
11/03/10	2:30 PM	FoxAdvisor, George	General	1
11/01/10	8:00 AM	FoxFaculty, George	General	1
11/04/10	11:30 AM	FoxFaculty, George	General	1
11/01/10	8:00 AM	Halter, Jon	General	1
11/01/10	11:30 AM	Halter, Jon	General	1
11/03/10	2:30 PM	Halter, Jon	General	1
11/08/10	11:00 AM	Halter, Jon	General	1
11/01/10	11:30 AM		General	1
11/09/10	1:00 PM		General	1

Grand Total Sessions: 13
Total Sessions Attended: 13
Total Attendees: 14
Total Sessions Not Attended: 0
Unrecorded Sessions Not Attended:

Other: Students That Visited

The *Students That Visited* Report allows for a quick overview of individual students that have at least one visit in the Center and date range chosen. Other information will be listed such as ID, Name, visit data and centers.

Other: Students That Visited by Consultant

The *Students That Visited by Consultant* Report lists students according to the consultant they had a visit with. Consultants are listed on the left, then the students who saw the consultant then center they visited, Date, Time and Duration. The report can be regenerated for a single center and different date range.

Redrock Advising
AdvisorTrac

There are 5 Consultant(s) that had visits between 11/01/2010 and 11/15/2010.

Consultant	Student	Center	Date	Time	Duration
Avolano, Frank					
	Carter, Nathan B	General Advising	11/10/2010	11:33 AM	0.00
		General Advising	11/11/2010	11:45 AM	1.00
	Cook, Heather M	General Advising	11/4/2010	11:19 AM	0.10
		General Advising	11/8/2010	11:11 AM	1.00
	Nguyen, Jennifer T	General Advising	11/11/2010	8:35 AM	0.00
	Welsh, Doug L	General Advising	11/10/2010	11:29 AM	0.06
Total 4 Students		6 Visits			2.18

Other: Consultant/Center Summary

The *Consultant/Center Summary* Report quickly displays Consultants Logins by Center. Each center is displayed along the left of the table. For each center, the consultants are listed with their number of visits, Appointments, Students, and status of appointments that logged into that particular center. The consultant logins can be regenerated for a specific center, or for different date ranges.

Redrock Advising
AdvisorTrac

There are 5 Consultant(s) that had visits between 11/01/2010 and 11/15/2010.

Consultant	Center	Visits	Students	Appts	Students	Attended	CANCELED - DELETED	Missed-ADV
Avolano, Frank								
	General Advising	6	4	3	2	0	0	3
	unidentified	0	0	1	1	0	0	0
	Overall:	6	*4	4	*3	0	0	4
FoxAdvisor, George								
	General Advising	2	2	2	2	0	0	2
	Overall:	2	*2	2	*2	0	0	2
FoxFaculty, George								
	General Advising	2	2	6	5	0	3	3
	Overall:	2	*2	6	*5	0	3	3
Halter, Jon								
	General Advising	4	3	1	1	0	0	1
	Math Advising	1	1	0	0	0	0	0
	Overall:	5	*4	1	*1	0	0	1
Smith, Jessica								
	General Advising	1	1	6	2	1	2	3
	Overall:	1	*1	6	*2	1	2	3

* totals do not necessarily represent a column total because the same student can visit more than one center multiple times.

Other: Visits for Students

The *Visit for Students* Report will list a student's record of the student's visit to the center(s). Students are sorted by name, date in and time in. The total number of Visits will be listed on the top of the report.

There are 22 Visits(s) between 11/01/2010 and 11/15/2010.

Centers :Advising, Financial Aid, General Advising, Math Advising, Music Advising
criteria: from 11/01/2010 to 11/15/2010

Name	Date In	Time In
Abdel-Jaber, Abdul H	11/2/2010	10:56 AM
Asgard, Daniel J.	11/9/2010	1:08 PM
Berntson, Mary Beth	11/12/2010	9:26 AM
Carr, Frederica May Porter	11/12/2010	9:25 AM
Carr, Frederica May Porter	11/12/2010	9:19 AM
Carter, Nathan B	11/1/2010	11:28 AM
Carter, Nathan B	11/1/2010	7:49 AM
Carter, Nathan B	11/4/2010	11:16 AM
Carter, Nathan B	11/10/2010	11:33 AM
Carter, Nathan B	11/11/2010	11:45 AM
Cook, Heather M	11/3/2010	2:22 PM
Cook, Heather M	11/4/2010	11:19 AM
Cook, Heather M	11/8/2010	11:11 AM
Cook, Heather M	11/11/2010	11:45 AM
Nguyen, Jennifer T	11/11/2010	8:35 AM
Shaw, Molly A	11/3/2010	2:23 PM
Shaw, Molly A	11/8/2010	11:13 AM
Shaw, Molly A	11/11/2010	8:29 AM
Smith, Jon Allen	11/11/2010	8:28 AM
Welsh, Doug L	11/1/2010	11:28 AM
Welsh, Doug L	11/10/2010	11:29 AM
Wright, Mark A	11/1/2010	7:48 AM

Other: Visits Export

The *Visits Export* Report provides visit data based on the fields that are chosen. Default fields include: date in, time in, time out, section term, center, reason, student full name, and consultant full name over an assigned date range. The most unique aspect of this report is that this report can be generated as a CSV file through the *Format:* field towards the bottom of the Report Chooser. This report is most commonly used to extract Visit data from your Trac system.

Redrock Advising
AdvisorTrac

[Visits]Date In	[Visits]Time In	[Visits]Time Out	[Sections]SectionTerm No	[Subcenters]Name	[CenterReasons]Reason	[Students]Full Name	[Consultants]FullName
11/9/2010	13:08:00	13:38:00		General Advising		Asgard, Daniel J.	
11/1/2010	07:48:38	07:49:53		General Advising	Change Major	Wright, Mark A	FoxFaculty, George
11/1/2010	07:49:08	07:49:54		General Advising	Change Major	Carter, Nathan B	Halter, Jon
11/1/2010	11:28:12	11:42:09		General Advising	Change Major	Welsh, Doug L	Halter, Jon
11/1/2010	11:28:53	11:42:10		General Advising	General Advising	Carter, Nathan B	
11/2/2010	10:56:02	11:18:44		General Advising	General Advising	Abdel-Jaber, Abdul H	FoxAdvisor, George
11/3/2010	14:23:01	14:29:40		General Advising	General Advising	Shaw, Molly A	Halter, Jon
11/3/2010	14:22:59	14:29:42		General Advising	Graduation Prep	Cook, Heather M	FoxAdvisor, George
11/4/2010	11:16:41	12:16:41		General Advising	General Advising	Carter, Nathan B	FoxFaculty, George
11/4/2010	11:19:11	11:25:36		General Advising	Change Major	Cook, Heather M	Avolano, Frank
11/8/2010	11:13:13	11:21:43		General Advising	Graduation Prep	Shaw, Molly A	Halter, Jon
11/8/2010	11:11:45	12:11:45		General Advising	Change Major	Cook, Heather M	Avolano, Frank

Other: Center Usage & Demographics by

The *Center Usage & Demographics* Report depicts a chosen field and a demographic breakdown of the students associated with the chosen field. The fields are listed vertically on the left side of the screen, and demographic summaries are detailed along the right side of the screen. Along the top, links to each center allows the user to regenerate the report for an individual center.

Center Usage and Demographics by Center Name

Centers : Advising, Financial Aid, General Advising, Math Advising, Music Advising
criteria: from 11/01/2010 to 11/15/2010, Active consultants only

Name

General Advising

	Visits	Hrs	Students
Total:	21	9.91	11

Demographics Summary

Ethnicity:

Anglo	1
Caucasian	6
Other	1
Polynesian	1
Vulcan	1
White, Non-Hispanic	1

Male: 6   **Female:** 5

Age: 19: 1 21: 1 22: 1 24: 1 25: 2 30: 1 ??: 4

Class:

FR	**2**
JR	**4**
SO	**3**
SR	**2**

College:

[blank]	**2**
Education	1
Engineering	1
GD	1
Journalism	1
Nursing	1
Performing Arts	**2**
Social Sciences	1
University of Texas	1

Other: Visit Notes

The *Visit Notes* Report displays visit information from students' meetings with consultants with the full consultants' notes from the visit. They can be generated for an individual student, student field, student list, or center.

Other: Usage Snapshot

The *Usage Snapshot* Report quickly displays any fields added through the *Snapshot Field* section. Each field added will display the name of the fields, number of students, total visits, total hours and a pie chart within the assigned date range. This report gives users a broad overview of the Usage of your subcenter(s), based upon the Snapshot fields chosen.

Centers :Advising, Financial Aid, General Advising, Math Advising, Music Advising
criteria: from 11/01/2010 to 11/15/2010

[CenterReasons]Reason

	Students	Visits	Hrs	%
Career Counseling	2	2	2.0	9.0%
Change Major	4	7	1.4	31.8%
General Advising	6	7	4.7	31.8%
Graduation Prep	5	5	1.2	22.7%
Total:	11	22	9.9	100%
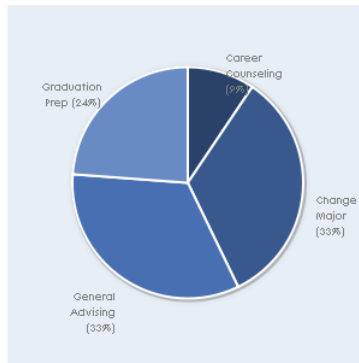
Other: Attendance by Hour

The *Attendance by Hour* Report provides a quick headcount of students at your subcenter(s) grouped by hour. This report displays the time of day that visits are occurring over a given date range. The attendance is plotted by number as well as in a bar graph. The hours of the day are listed vertically on the left, and then columns to the right depict the number of students in the center at any given block of time. The report can be regenerated for an individual center or customized date range.

Redrock Advising
AdvisorTrac

Hour		% of Max for Day	
8:00 AM	2	25%	
8:30 AM	3	38%	
9:00 AM	5	63%	
9:30 AM	2	25%	
10:00 AM	2	25%	
10:30 AM	1	13%	
11:00 AM	8	100%	
11:30 AM	8	100%	
12:00 PM	4	50%	
12:30 PM	2	25%	
1:00 PM	1	13%	
1:30 PM	1	13%	
2:00 PM	2	25%	
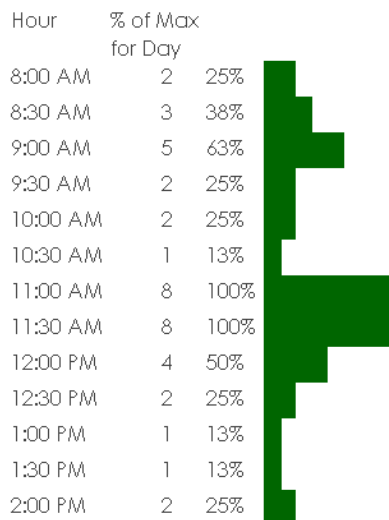
Other: Attendance by Hour by Day of Week

The *Attendance by Hour by Day of Week* maps the attendance of students visiting your subcenter(s) in selection and maps attendance based on time in half-hours and days of the week. The report is plotted by number in a grid with hours of the day are listed vertically on the left and days of the week horizontally on the top. The *Attendance by Hour by Day of Week* report accounts only for a student's that attended in the center, and not for their total visit. The report can be regenerated for an individual center, date range, or block of time.

Redrock Advising
AdvisorTrac

For centers Advising, Financial Aid, General Advising, Math Advising, Music Advising
criteria: from 11/01/2010 to 11/15/2010

Hour	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
8:00 AM	0	0	0	0	2	0	0	2
8:30 AM	0	0	0	0	3	0	0	3
9:00 AM	0	0	0	0	2	3	0	5
9:30 AM	0	0	0	0	0	2	0	2
10:00 AM	0	0	0	0	0	2	0	2
10:30 AM	0	0	1	0	0	0	0	1
11:00 AM	0	4	1	1	2	0	0	8
11:30 AM	0	3	0	2	3	0	0	8
12:00 PM	0	1	0	0	3	0	0	4
12:30 PM	0	0	0	0	2	0	0	2
1:00 PM	0	0	1	0	0	0	0	1
1:30 PM	0	0	1	0	0	0	0	1
2:00 PM	0	0	0	2	0	0	0	2
2:30 PM	0	0	0	0	0	0	0	0
3:00 PM	0	0	0	0	0	0	0	0
3:30 PM	0	0	0	0	0	0	0	0
4:00 PM	0	0	0	0	0	0	0	0
4:30 PM	0	0	0	0	0	0	0	0
Total:	0	8	4	5	17	7	0	41

Other: Logins by Hour by Day of Week

The *Logins by Hour by Day of Week* maps the number of logins performed by students visiting your subcenter(s) in selection, and maps these logins based on time in half-hours and days of the week. The report is plotted by number in a grid with hours of the day are listed vertically on the left and days of the week horizontally on the top. The *Logins by Hour by Day of Week* report accounts only for a student's that logged in to the center, and not for their total visit. The report can be regenerated for an individual center, date range, or block of time.

Redrock Advising
AdvisorTrac

Logins

From 02/01/2013 to 02/28/2013, for centers Demo Advising Center, Dev Learning Center

Hour	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
8:00 AM	0	1	0	0	0	0	0	1
8:30 AM	0	0	0	0	0	0	0	0
9:00 AM	0	0	0	0	0	0	0	0
9:30 AM	0	0	0	0	0	0	0	0
10:00 AM	0	0	0	0	0	0	0	0
10:30 AM	0	0	0	0	0	0	0	0
11:00 AM	0	0	0	0	0	0	0	0
11:30 AM	0	0	0	0	0	0	0	0
12:00 PM	0	0	0	0	0	0	0	0
12:30 PM	0	0	0	0	0	0	0	0
1:00 PM	0	0	0	0	0	0	0	0
1:30 PM	0	0	0	0	0	0	0	0
2:00 PM	0	3	0	0	0	0	0	3
2:30 PM	0	0	0	0	0	2	0	2
3:00 PM	0	0	1	0	0	0	0	1
3:30 PM	0	0	0	0	2	0	0	2
4:00 PM	0	0	0	0	6	0	0	6
4:30 PM	0	0	0	0	0	0	0	0
Total:	0	4	1	0	8	2	0	15

Other: Consultant by Specialties

The *Consultant by Specialties* Report first lists the specialties of a Consultant and then the lists the Consultants who have that specialty. The specialties are listed vertically, and listed to the right are the Consultants who have that specialty.

Consultants by Specialties

Centers :Advising, Financial Aid, General Advising, Math Advising, Music Advising
Active consultants only

6	Advisor, Demo	Bagley, Heather	
	Advisor, Demo		
	Advisor, Demo	Bagley, Heather	
	Smith, Jon		
	Advisor, Demo	Bagley, Heather	Halter, Jon
	Bagley, Heather		
	Bagley, Heather		
	Bagley, Heather		
ACC211 Term:51	Advisor, Demo	Bagley, Heather	
BIO101 1234 Term:20093	Advisor, Demo	Bagley, Heather	Halter, Jon
BIO101L 0123 Term:20093	Bagley, Heather	Halter, Jon	
BIO110 1109 0920 Term:200920	Bagley, Heather	Halter, Jon	
BIO110 1110 0920 Term:200920	Bagley, Heather	Halter, Jon	

Other: Consultant Linked Centers

The *Consultant Linked Centers* Report first displays Consultants name, and then lists the respective center that the consultant is assigned to. The Consultants names are listed vertically to the left and to the right are the centers they are assigned to.

Consultant Linked Centers

Centers :Advising, Financial Aid, General Advising, Math Advising, Music Advising
Active consultants only

Advisor, Demo	[General Advising]	Redrock Advising	
Avolano, Frank	[General Advising] Learning Center	[Math Advising] Redrock Advising	
Bagley, Heather	[General Advising]	Redrock Advising	
Duckson, David	[#113] [General Advising]	[Music Advising] Redrock Advising	
FoxAdvisor, George	[General Advising]		
FoxFaculty, George	[General Advising]		
Frost, Elvis	[#113]	[General Advising]	Redrock Advising
Godwin, Jerry	[#133]	[General Advising]	Redrock Advising

The *Center Profile Detail* Report shows a detail view of all users assigned to groups within all Center Profiles.

SAGE: Referral Snapshot

The *SAGE Referral Snapshot* Report displays an overview of the reason/recommendations included in your SAGE referrals, as well as a total number of Referrals made for the respective reason/recommendation, and total number of students that these Referrals were created for. A total number of Referrals and Students will be listed towards the top of the report.

Student Support Services
TutorTrac

Student Alert Memo
2 referrals, 2 students.

Reasons:	Referrals	Students	Recommendations:	Referrals	Students
Does not attend class	1	1	Peer Tutoring	0	0
Is inattentive in class	0	0	see Tutoring Coordinator	0	0
Missed scheduled appointment	0	0	See Advisor	0	0
Has problems taking tests	0	0	Consider Withdraw from class	1	1
Does not turn in assignments	0	0			
Does not participate in group assignments	0	0			
Quality of work does not satisfy course expectations	0	0			
Has poor writing skills	0	0			
Turns in assigments late	0	0			

SAGE: Referral List

The *SAGE Referral List* Report shows in alphabetical order a list of students who have had referrals created for them, as well as any corresponding information for these referrals including the date range, referral type, referred by field, date, and subject/course, reasons, recommendations, and any notes included in the referrals.

Redrock Advising
AdvisorTrac

SAGE Referral List

2 referrals, 2 students.

Referral Listing: ANY

	Student	Type	Referred By	Date	Subject/Course	Reasons	Recommendations	Notes
133	Carter, Nathan B	Learning Assistance		11/3/2010	Enter a subject	A grade Preparation Attendance	Counseling	
14	Smith, Jon Allen	Learning Assistance		11/11/2010		A grade Attendance	Shock Therapy	

Chapter 18: FAQs

Installation / Configuration

How do I install the software?

The Trac software will be available for download after purchase has been made. Contact Support@Go-Redrock.com for the link to download the latest release of the software. The download link will provide a complete installation package, including the web server and database. On a Windows server, the download will be a self-extracting exe file that will install the Trac application on the C: drive.

What are the Server Requirements?

The server requirements to run your Trac application are very minimal. It is not required to have server-class hardware or operating system, and a very capable server can be found for under $1000.

At minimum you want a P4 2.8 GHz processor, 2 GB RAM, 2 GB Hard Disk space.

What is the required server operating system?

The Trac system can be installed on any Windows OS 2003 and newer.

Can the server be assigned a DHCP IP Address?

No, the Trac application requires a static server IP Address. The IP Address is used to check your installation code and also to access your Trac application web interface.

Can I install the Trac application on multiple computers?

No, your Trac application will only be installed on a single computer. This computer will be the server (even if it is not 'server' hardware). The users can access your Trac application from any web-enabled device on the network. As a web-based application, there is no need to install the software on any other computer.

Can I install the Trac application on a virtual machine?

Yes, the Trac application runs fine on virtual servers.

Can the Trac application use the campus LDAP or Active Directory to log in users?

Yes, the Trac application is LDAP and Active Directory compatible. The authentication would be customized by Redrock Software. Redrock Software would need the LDAP/AD Server Address, Base DN, and a valid username & password to create, test, and implement the LDAP/AD Authentication script.

Can the Trac application be integrated with our campus Portal, Single Sign-On (SSO), CAS, WebAuth, or other?

Yes, the Trac application can integrate with Portals, SSO, CAS, or WebAuth. This integration is customized by Redrock Software. Redrock Software would work with your campus IT Dept to fully integrate the Trac application.

How can our Trac website be secured?

Redrock Software recommends utilizing a 3rd party application named Stunnel to encrypt the data between the web server and the users' web browsers. Stunnel is a free, open-source SSL wrapper that is installed on the server with the Trac application. The Trac application connects with Stunnel without encryption on the local server. Then Stunnel encrypts the data and connects with the users' browsers across the network.

What information is needed to generate a certificate for SSL?

- Organization Name – University
- Organizational Unit – Department
- City, State ZIP
- Email address
- Common Name or Fully qualified domain name – i.e. TutorTrac.myschool.edu or AdvisorTrac.myschool.edu

Does TutorTrac support Shibboleth?

Yes, we have worked with Shibboleth on several occasions. Once the student has authenticated, either the username or student id is sent back to TutorTrac.

Can we use an SQL database for the Trac application?

No, the Trac application utilizes a 4th Dimension database (http://www.4d.com). The web server front end is developed specifically for use with this integrated database. A future version (no ETA) of the Trac application will utilize a mySQL database.

Can we run our Trac site from an IIS web server?

No, the Trac application utilizes a custom web server developed by Redrock Software. The web server was developed to integrate fully with the built-in 4th Dimension database.

Can we run our Trac site from an Apache web server?

No, the Trac application utilizes a custom web server developed by Redrock Software. The web server was developed to integrate fully with the built-in 4th Dimension database.

Can our Student Information System integrate with our Trac application?

The Trac application can import data from any source as long as it is provided in the correct format. The data needs to be provided in a flat file format. .TXT, .CSV, .DAT, .LIS, and .XML are examples of valid file formats. The Trac application will not import data from Excel files. The data must be saved in a flat format. The order and delimiter of the fields is completely up to your preference, however, the format, order, and delimiter of the fields must remain consistent with every import. Redrock Software recommends that the student demographic data be imported with the students' course registrations and course instructors.

Can the Trac application run as a service on the server?

Yes, the Trac application can be run as a service so a user is not required to remain logged on to the server for the Trac application to run. The Trac application is installed as a service by utilizing a small application named Winserv. See the article, Install the Trac Application as a Service, for more detail to install the service with the Winserv utility.

We've bought the Trac Product and are in the process of installation. Is there anything we can do to prepare for full implementation?

First, the major factor that determines how smoothly initial configuration goes is your workflow. How would your campus like processes to run in regards to Visits, Appointments, Logging students in and out / Recording Visits, Scheduling, and most importantly, what type of data you want to run reports on at the end of it all. These Visit, Appointment, and Scheduling processes are typically highly dependent on the data you want to collect.

Important Questions to ask:

- **Do we want to sign students in and out of our centers (to collect Visit Data) or Do we want to strictly run an Appointment based schedule?**
- **Who will be signing students in and who will be signing them out? (Front desk workers, consultants)**
- **Will Consultants enter visit notes to the visit records?**
- **Who will be responsible for creating Consultant Schedules?**
- **Do we want students to be able to book their own appointments?**

Additionally, here are some advanced questions about 3 major elements of your Trac system setup:

1. **The Import Process (importing student and course data)**

2. **LDAP Authentication (single sign on using campus credentials for users – students, consultants, etc)**

3. **SSL encryption – (secure network)**

These 3 processes will require some involvement with your IT department, or whichever department is responsible for your Server that hosts your Trac application. This is the main reason why these processes typically take a little longer to complete, and may be beneficial to get started early. Here are some links to our Wiki site that detail these 3 processes.

- Import - http://wiki.go-redrock.com/wiki/Import_from_Student_Information_System
- LDAP Authentication - http://wiki.go-redrock.com/wiki/LDAP
- SSL Encryption - http://wiki.go-redrock.com/wiki/Stunnel

So to summarize, discuss with your Administrator group the details and specifics of your workflow process. Discussions should revolve around the Log in process, Scheduling, and what type of Data you want to collect in Reports (visit info, appointment info, etc). Regarding the 3 processes that will need IT involvement, assess whether or not some of these tasks can be done previous to installation (choosing which fields to Import, how to obtain SSL certificates). If at any time you have questions or require clarification on any processes contacting Redrock support at support@go-redrock.com.

Center Profiles / Subcenter Setup

What is a Profile?

Center Profiles were introduced in version 4.0. A Center Profile allows you to set up users, consultants, groups, and centers that share preferences and settings. The Groups will establish group privileges and settings for users and consultants. While the individual centers share the global profile settings, the groups and users can be restricted to accessing information by to each center.

Why would I need another Profile?

Another Profile would be needed when multiple centers cannot agree on the settings within the same Profile. There are three key areas of settings in which centers might have a conflict: Log In/Out, Appointment Scheduling, and Email Settings.

Can I add a Profile to my existing Trac system?

Yes, a Profile may be added to an existing system at any time. A Profile has an additional cost. You need to contact Redrock Support for assistance in purchasing and activating a new Profile.

How do I set up another Profile?

First, you need to purchase a Profile License by contacting Sales@Go-Redrock.com. Second, you need to choose Center Profiles from your Trac Navigation Search Glass. From the Center Profile Listing, choose Create New from the List Options menu. Third, you need to name your Center Profile and save it. When you save your Profile, your Profile is assigned a Sequence number. Finally, email that Sequence number to Redrock Support<Support@Go-Redrock.com>. Redrock Support will generate a unique Activation Code for your Profile and you can enter that code to activate your Center Profile.

How do I set up multiple centers?

A Centers tab appears at the top of your Profile Entry screen. This tab gives access to the unique Centers that are set up for the Profile. A Center in the Trac application is a unit that has unique Consultants, Schedules, Visits, and Reports. The Centers will most often be setup according to unique departments, however, you may set up your Centers according to any convention that fits your needs.

If we have purchased TutorTrac and at a later point decide to purchase AdvisorTrac as an add-on Profile, what are the advantages/disadvantages to taking this route as opposed to purchasing a completely separate installation?

The first and most obvious advantage of purchasing an add-on Profile is the financial benefit. Purchasing an additional Profile (as opposed to a brand new installation) comes at a significantly lower cost. Management, administration and training processes can also be streamlined in terms of efficiency, as less users will require instruction on how to utilize the software properly. That being said, the disadvantages of having 2 profiles under a single installation stem from the same issue. If Management and Administration CANNOT come to a compromise or different management groups become necessary for each profile (administration becomes separated), you may want to consider purchasing a fresh install to avoid any friction that may occur between two groups. Two profiles under one installation will need to come to a compromise in several situations, and often the blending of Trac

system functions, student data, course data, automated events and emails can cause confusion between users, administrators, and can sometimes negatively affect data that is being collected. The initial setup of your Center Profiles is a crucial step in the process of setting up your Trac system properly, and if you need additional information before any decisions are made, do not hesitate to email us at support@go-redrock.com or contact Redrock support at (877) – 303 -7575 ext 201 for general support.

Is it possible to copy tutors from one profile to another?

While you can't make a copy of a Tutor you can add a Consultant from another Profile. Go to the Profile you want to move the consultant TO and then go to the Consultant's Tab > List Options > Add from other Center…

This will give you a list of consultants from other profiles that you can add to the selected Profile.

Customization / Design Layout

How do I set our school logo?

The Trac system provides a place for a logo image to appear as a banner in the upper-right corner of your Trac system web pages. The banner is a GIF image file named SchoolBanner.gif and is placed on the Trac server in the Webfolder/TracWeb40 folder of your Trac application installation directory. Redrock Software recommends an image height no greater than 75 pixels for your banner. Consider the users' screen resolutions when considering the width of the banner image. A Trac System Administrator can upload the banner image through the Trac system via the Utilities & Prefs.

How do I change the Trac colors?

A Trac System Administrator can set up the default colors of the titles and title bars on the Trac system windows. The Trac System Administrator can set these colors from the System Preferences found in the Utilities & Prefs. The campusColorData preference provides a setup utility to select and test colors before implementing the colors for your Trac system. The Reset

How do I change the login instructions?

Any user that logs into your Trac system will log in through the same screen, so the login instructions are global to your Trac system. The instructions are found in the System Prefs. The name of the pref is MsgsAll. The instructions can be formatted with HTML to customize your fonts, colors, and sizes or add links and images.

How do I set up a nice URL or website to access the Trac system?

Your Trac application serves the Trac system web pages from the IP Address of the server. Your Trac system will be accessible via web browser by entering the IP Address as the URL. You can set up a domain name for that IP Address through your network administrator. When your site has a domain name, you will be able to access your Trac system by a recognizable address like trac.college.edu.

How do I load student data to my Trac system?

Your Trac system can import student information from an ASCII flat file. You obtain that file from your student information system. Provide a sample of the file to Redrock Support and you will receive a script that imports the data from the flat file to your Trac system database. So long as your file format remains the same, you will be able to continue to import updated student data to your Trac system. The entire process can be automated so you do not even need to do anything.

How do I load course data to my Trac system?

Your Trac system can import course registration information from an ASCII flat file. You obtain that file from your student information system. Provide a sample of the file to Redrock Support and you will receive a script that imports the data from the flat file to your Trac system database. So long as your file format remains the same, you will be able to continue to import updated course registrations to your Trac system. The entire process can be automated so you do not even need to do anything.

How do I notify instructors when their students are visiting?

The Trac system has a couple of standard functions in place to allow you to contact the faculty when their students visit your center(s) for assistance. You can ask the students to check a box to email their instructor as they sign out of a visit. You can ask the tutors to enter their session notes and then click a button to email the visit information and notes to the instructor. You can even automate a process to run nightly or weekly and email the faculty a list of all of their students that have visited. Redrock Support will assist you in setting up these options.

Emails

How do I set up emails for my Trac system?

The Trac system has a global setting to store a value for an SMTP Mail Server. The setting is found in the System Preferences. The preference name is MAILSERVER. It can be entered with a domain name or an IP Address. The mail server needs to allow anonymous mail relay from the Trac server IP Address. An incorrectly entered mail server can cause your Trac system to operate very slowly as it attempts to connect to a non-existent mail server when scheduling or cancelling appointments.

How do I send an email to a group of students?

The Trac Navigation allows you to search students very quickly. When you have searched and found a selection of students, you can choose to send an email to this entire group at once. You can do so by choosing to Send Note from the List Options menu. Enter your email subject and message and then choose if it is an email or just a note within your Trac system. Click Send Message to complete the message and send it to the group of students.

How do I email students a reminder of their appointments?

Each Center Profile has its own unique preferences and settings. The Email tab in the Center Profile Prefs allows you to set up and format email reminders for appointments. Reminders may be sent to students, consultants, or both. The reminder message is formatted differently for the students and consultants. A student can receive a reminder for each appointment that they have scheduled the next day. A consultant can receive one email that details all of their scheduled appointments for the next day.

Additionally, the Trac system has a global setting that controls when email reminders are sent. The Automated Events tab in the Utilities and Prefs contains the timing settings and activation of the Email Reminders.

How do I email consultants a reminder of their appointments?

Each Center Profile has its own unique preferences and settings. The Email tab in the Center Profile Prefs allows you to set up and format email reminders for appointments. Reminders may be sent to students, consultants, or both. The reminder message is formatted differently for the students and consultants. A student can receive a reminder for each appointment that they have scheduled the next day. A consultant can receive one email that details all of their scheduled appointments for the next day.

Additionally, the Trac system has a global setting that controls when email reminders are sent. The Automated Events tab in the Utilities and Prefs contains the timing settings and activation of the Email Reminders.

How do I receive a copy of the emails that are sent to students?

Each Center Profile has its own unique preferences and settings. The Email tab in the Center Profile Prefs allows you to configure email settings. You can configure a Center email address that will be used to send email confirmations and reminders to the students. There are checkbox settings to allow this same email address receive a copy of the appointment confirmations, reminders, and cancellations.

Is there a table that explains the codes used for emails?

http://wiki.go-redrock.com/wiki/Prefs:_Emails

Can I transfer appointments from my Trac system calendar to my Outlook calendar or Google Calendar?

Yes, iCal attachments can be attached to appointment emails that are sent out by your Trac system, which can then be accepted into your Outlook, Google, or Apple calendars.

How do Trac appointments integrate with Outlook?

When an appointment is scheduled your Trac application can send a confirmation email. Included in the email is an iCal attachment. This attachment will display appointments in your Outlook calendar as meeting invitations.

Can I book my appointments in Outlook?

No, unfortunately the relationship between your Trac System and Outlook is similar to a one way road. Appointment Reminders and Confirmations within your Trac system can be accepted into your Outlook calendar through the iCal attachment sent through email. However, this cannot be done from Outlook to your Trac system.

Why can't Trac appointments be completely integrated (two way road) with Outlook?

AdvisorTrac allows for appointments to be scheduled between an advisor and a student. These appointments can be scheduled by the student, advisor, front desk staff, student workers, administrators, or any number of other users in the system. That means that correct levels of access

to the schedule needs to be provided to the proper users. There are also many other factors that affect the scheduling, including rules for scheduling appointments, individual or group appointments, reasons for appointments, and so on. The AdvisorTrac system has a record of the advisor and a record of the student and will use scheduling rules and permissions for users to schedule the appointments. When an appointment is booked in the AdvisorTrac system, the basic information of the appointment (date, time, duration, student, advisor, reason, etc.) is passed in an iCal attachment to the user's Outlook calendar.

Outlook does not enforce rules or include permissions for many users to search and interact with advisor schedules to book appointments. When an appointment is booked, Outlook has no idea of who the student is or who the advisor is or if there is a rule that should have prevented the appointment. Outlook cannot communicate all of the necessary information, provide the level of access, or follow a basic set of scheduling rules as AdvisorTrac can, so the two systems may not speak directly one with another.

After booking an Appointment, my Trac system never seems to complete the Save process and loads for extended periods of time. When I close the window and view the schedule, however, I do see that the appointment was booked successfully. What issue is occurring here?

This issue commonly occurs when your Mail server settings have either not been set up or have been modified. The system is attempting to send Appointment confirmation, cancellation, or missed emails and so the system will continue to load until the task of sending messages has been completed. A student or Consultant email address may also be incorrect. This issue can with great certainty be isolated to Email settings.

Visits / Appointments / Availabilities

What is an appointment?

Record that a student reserved a time to meet with a consultant. An appointment may be assigned a status to identify the outcome of the reserved time.

What is a visit?

Record that a student utilized the services offered at your center(s). Visits may be logged in real time by asking the student to sign in when they arrive and sign out when they leave or they may be recorded after the fact.

What is an availability?

An availability is an appointed time that a consultant offers for student appointments or drop-in visits.

What is the difference between a Visit and an Appointment?

The difference between a Visit and Appointment lies heavily in the link between the two. A Visit may not necessarily have a corresponding Appointment, and in the same vein, an Appointment may not have a corresponding Visit. In the case where a student drops in to your Center for a walk-in Visit, this Visit record will not be linked to an Appointment. Similarly, Appointments that have been either Missed or Cancelled will not be linked to a Visit record (the student did not show up to your center). Visits and Appointments both play important roles in the effort of obtaining accurate data. Thus, it is imperative that the links created between Appointments and Visits are handled properly by the Process and Workflow of your Centers.

Missed Appointment Automated Event

The Missed Appointment Automated Event is an Automated Process that we recommend running on a daily/nightly basis. The process simply analyzes Visit Data and either matches Visits to the appropriate Appointments (Attended), or marks Appointments as Missed. For example, let's say student Sam Smith booked an Appointment on Monday from 8 am to 9am. Sam successfully logs into the Center at 8 am and logs out at 9 am after his session is finished. The Missed Appointment Automated Event runs that night at 12:00 am midnight, recognizes that Sam had an hour-long Visit from 8am to 9am, and subsequently links that Visit to the appropriate Appointment. Let's say on the other hand that Sam makes it to the Appointment, but somehow forgets to log in and log out. The system in this situation does not find any visits for Sam, and automatically marks his appointment as Missed.

The Missed Appointment Automated Event has a few parameters that we must define involving Appointment Tolerance. This preference defines the "grace period" that the Automated Event will use to determine whether or not the Appointment was Attended or Missed. For instance, if we set the Appointment Tolerance as 30 minutes, Sam will need to log in at the very earliest 7:30 am for his Appointment, and at the very latest 9:30 am. If he logs in outside of this time range, the Appointment will be marked as Missed.

What do I do when a consultant calls in sick? Can I block times from my schedule?

Yes. Blocking times can be done in two ways. First an individual consultant can create an availability block by creating an availability and then un-checking the "is availability" checkbox in the top right corner of the availability creation window prior to saving. The second method is creating a block for an entire center which can only be done by administrators in the Center Profile> Centers tab.

How do I block times that my school/center is closed?

To create a center block you must have admin privileges to the Center Profile. In the Center Profile you will go to the Centers tab and click on the ID number of the center you would like to create the block for. Click on the "new" button in the center of the page and enter the details of the block. Note: if you would like to create a block for all center you will need to choose the Center Profile and check the box "is Global to all Subcenters?" located above the description field.

How do I move an appointment from one consultant to another?

You can use the Move To function to move appointments from one consultant to another. (See Chapter 10: Appointments, page 31 at the bottom of the page for more details)

Additional Modules

What is SurveyTrac?

The SurveyTrac add-on module enables surveys to be created and delivered manually or automatically to users through the Trac 4.0 application. SurveyTrac can be utilized to gather additional feedback from students, consultants, or any user group. Surveys are fully customizable and there is virtually no limit to the amount of surveys that you can create, or question/answers that you can design.

Do I need SurveyTrac?

SurveyTrac may not be essential for ALL campus Trac systems, and there are many features already included in your Trac system that can be utilized for similar purposes that SurveyTrac has to offer. However, SurveyTrac can certainly optimize data collection and can be used to maximize the quality of information gained from the use of your Trac system. SurveyTrac can offer the collection of highly detailed data – information that often may not be able to be collected via normal means. If you would like more information about SurveyTrac, contact Redrock support at support@go-redrock.com, or schedule a SurveyTrac demo at www.go-redrock.com -> Technical Support -> Training Request.

How do I survey a group of students?

Surveys can be sent out to groups of students on an individual basis or surveys can be sent out based on Searches or Lists. Once the correct search has been performed, click List Options > Send Surveys. If you need more information on Search Options or help narrowing your search to the correct group of students, see Chapter 19: Tips & Hints.

How do I use SurveyMonkey with my Trac system?

Because SurveyMonkey functions through a Link to a URL address, SurveyMonkey links can be placed in a variety of locations within your Trac system. Commonly, SurveyMonkey surveys are sent out via email (with link included) and responses are collected through 3rd party features. To send a group of students an email or message, first perform a Search for the desired Group of Students, then click on List Options > Send HTML Note (all in the Student Listing, for more detail see Chapter 8: Students).

What is Whiteboard?

The Whiteboard module provides an online interface with an interactive chat, drawing area, and documents for your consultants to meet with your students. Whiteboard can provide a virtual classroom where Tutors, Advisors, and Students can conveniently meet, discuss assignments, go over lectures, exam reviews, and even grade assignments. With a purchase of the Whiteboard add-on Module, the Live-Doc feature comes included which allows users to grade Writing Assignments using a "red pen" with a large list of standard Editing symbols. The Whiteboard module is used by many campuses to offer yet another convenient option to add to your campus services.

Do I need Whiteboard?

What is SAGE?

SAGE, or Student Alerts and Group Events, represents the Early Warning Module for Trac systems. SAGE is typically used for SI Programs, Retention programs, and even for At-Risk Students. The SAGE Early Warning module will allow your faculty to submit referrals, progress reports, or evaluations for the students enrolled in their courses. SAGE allows your Faculty members, Tutors, Advisors, and even Deans or Counselors to be as proactive as possible in terms of doing their best to help struggling students.

Do I need SAGE?

Is it safe to assume that we can implement these additional modules at any time?

Yes, all additional modules can be activated at any desired time after installation. If an extended time period has passed your system may need to be updated in order to activate the latest Text Alerts and Mobile View modules.

If we have two Trac systems working under one Center Profile installation, can these additional modules be shared?

Yes, having 2 separate profiles would allow both profiles to share the additional modules. Each profile in almost all situations would be able to utilize the module in its own way, and comes at a significantly lower financial cost. That being said, having a separate module for a separate profile may be advantageous in terms of organization, management, administration, and to avoid confusion in general.

Kiosks / Card Readers / Barcode Scanners

How do I set up a KIOSK?

See Chapter 15: Kiosks.

What types of card readers are compatible with the Trac system?

All card readers are "compatible" with your Trac system as long as they are compatible with your Operating System.

What happens if our ID cards contain more information than just the Student ID, what changes do we need to make to our Barcode reader?

If the ID cards contain more information than just the Student ID, then we will need to implement a barcode script in your Trac system preferences to adjust the scan and exclude certain numbers/digits. A few things will need to be in place in order to modify the scan:

1. The ID portion of the scanned data needs to be in the Barcode field of your student records
2. Scan a Student ID card into a text editor, such as Notepad, WordPad, or TextEdit
3. Email the scanned data to support@go-redrock.com along with the matching Student ID or Barcode

We will use the supplied information to create a script that will modify the scanned data as it checks for a matching student record. The modified scan data is only checked against the student Barcodes, so you must have barcodes in your student records to use the scanner/reader. Student barcodes are typically imported with the student data from your student information system.

Is there a table that explains the codes used for SAGE?

SAGE Referral Fields

Reasons:	#Reasons#
	#sagerereasons:formatted#
	#sagereasons:plain#
Recommendations:	#Recommended#
	#sagerecommended:formatted#
	#sagerecommended:plain#
Subj:	#refSubject#
Type:	#refType#
Date:	#refDate#
Time:	#refTime#
Notes:	#refNotes#
Additional info:	#refAddlInfo#
FollowupDate:	#refFollowUpDate#
Followup by:	#refFollowUpBy#
Processed:	#refProcessed#
Precessed Date:	#refProcessedDate#
Processed by:	#refProcessedBy#
Processed Notes:	#refProcessedNotes#

What address is needed for Text Messages to be sent?

In order for a student to sign up to receive text alerts, they log in to AdvisorTrac / TutorTrac and request an activation code. At that time, your Trac application attempts to connect to our server at msgtrac.com (63.224.138.163) to receive the code.

Miscellaneous

What is the significance of a Daily Backup?

It is generally good practice to maintain Backups for your Trac system Data to conserve Data in the case of an emergency (power outage, hard-drive failure). Daily Backups are essential to preserving the data collected by your Trac system.

How do we go about implementing a Backup Process?

Navigate to your Utilities and Prefs (TracMan Icon). In your Utilities and Prefs, select the "Automated Events" Tab. The Automated Event or Process we are looking for is entitled "dataBackup". The Automated event "dataBackup" simply copies the 1 major database file (Tutortrac.4dd) and moves them into a separate folder on your Trac Server. The running of this process is dependent on the checkbox selection underneath the "Pending" column. If this checkbox is selected, this Backup process will run at the time that you designate. If we click on the name of the Automated Event "dataBackup", we can modify the preferences and set the process to run daily, weekly, or monthly, and we can specify the exact time that this process will be activated.

Describe the process of Server Migration.

Each Trac system is a self-contained database, so when you're ready to move to a new server, you can simply move the Trac folder from the old server to the new server. If the IP address of the new server is different from the old server, you will then need to contact us to obtain a new Installation code (support@go-redrock.com).

Describe the processes our campus needs to run when the Semester Term changes to a new Semester Term Code.

To summarize briefly, you will first need to change your current semester term code. Navigate to your Utilities & Prefs > Advanced Tab and search for "currentterm". Once you have located the advanced preference "CurrentTerm" select it and modify it to reflect your new term code. Then we will need to run the Import process for both your Students and Courses. Make sure both files are updated and placed in your Trac system folder, then run the Import Process using the "Import Student Data" Custom Utility (Utilities & Prefs > Custom Utility). Finally, after your import has been completed, we will need to activate your courses for each of your subcenters. For more details regarding this process see Chapter 9 – Sections. Our wiki page regarding Changing Semesters can also be used as reference for this entire process - http://wiki.go-redrock.com/wiki/Changing_Semesters.

How do I reset a student's Center Status? How do I reset ALL students' Center Statuses?

What is the ListServ? How do I gain access to the List Serv?

The ListServ is an online forum that allows customers to discuss general usage of the TutorTrac and AdvisorTrac systems and view feedback given from representatives from campuses all across the nation. The ListServ is a great method to expand your network and find resources among other Trac system users. See "Join the User ListServ": http://wiki.go-redrock.com/wiki/Support_Resources

Is there a website that details changes made for recent Updates? How do I keep track of the latest Updates available for our Trac system?

The best way to keep track of recent update releases is to check in to our Wiki 4.0 Recent Changes webpage. Updates are typically released on a monthly/bi-monthly basis.

http://wiki.go-redrock.com/wiki/4.0_Recent_Changes

My question about AdvisorTrac is related to the retention of notes. One of my advisors mentioned to me recently that he noticed that his notes from about a year ago are missing from one of his students. Does AdvisorTrac clear out notes after a specified amount of time? If so, what is that timeframe and can it be changed? If not is there another explanation why the notes would be missing? Perhaps they are archived and stored elsewhere?

The visit records and notes are stored indefinitely. Student Messages are also stored indefinitely. They will not be removed automatically and can only be removed manually from the database. This can only happen by a user manually removing records (intentionally or accidentally) or by someone asking Redrock Support to remove the records for them.

If Redrock was asked to remove the records, it would not have been a single record; rather, it would have been a block of visits or messages that match the some specific criteria. For example, we would have removed all visits or messages older than a year, all visits or messages on a specific day, etc… Trac systems do not remove records automatically.

As I'm working on Tutortrac, I receive a Connection Reset message frequently. I then refresh the screen and everything functions properly. However, this happens multiple times within a day. What does this error mean and how can I prevent these error messages from being sent out so frequently?

This issue has to do with an update released in October 2012. The update addressed a bug in Firefox that complicated the way the browser connected to the server. There is an Advanced Preference in your Utilities & Prefs called "maxwaitdeadconnect" that holds a default preference of 40 ticks (fractions of a second). This preference basically determines the length of time your system will wait until an idle request is terminated. If the Connection Reset message is occurring frequently (2-3 times per session), you can increase the preference from 40 ticks to 60, 80, even 100 or 120 ticks to decrease the frequency of the Reset error occurring.

How can we change our Semester Start and Semester End times?

To change the semester start and end date go to the Trac Navigation > Tracman Icon > Utilities & Prefs > System Prefs > on the 2nd page, under Campus Information > edit the SemesterEnd and SemesterStart preferences.

TroubleShooting

Why does the Trac application quit whenever it is started?

Windows Server 2003 and newer operating systems utilize a software technology called Data Execution Prevention (DEP) that performs additional checks on memory to help prevent malicious code from running on a system. The primary benefit of DEP is to help prevent code execution from data pages. Your Trac system utilizes this memory for some execution of scripts and will need to be set up as an exception in your Windows DEP settings.

Notification Emails are not being sent to our Tutors. What steps do we need to take to set up Automated Emails?

There are a few settings that need to be put into place. First your mail server needs to be set up properly (needs to be SMTP) and second some Center Profile Preferences may need to be modified or set. The email templates may then be designed and customized per message (confirmation, cancellation, missed, schedule summary, etc..) and per user type (consultant, student, center). Click on the question for a link to our Wiki for more details.

Chapter 19: Tips & Hints

There are typically a few outstanding differences between an experienced Trac system user and a novice Trac system user. Users who are more familiar with navigation and layout over time develop a unique relationship to their Trac system, discovering new methods and processes that help streamline usage. This chapter attempts to bridge the gap between the advanced and novice user by detailing some helpful tools and techniques that can be utilized in your Trac system.

Searches

The importance of being able to perform both accurate and efficient searches becomes more and more apparent with consistent use of your Trac system. In terms of records: students, consultants, visits, appointments, sections, registrations, faculty, resources, etc…searching becomes absolutely essential not only for quickly locating a group of records, but also for running effective reports, and ultimately bringing the most potential out of your Trac system.

Trac Navigation Student Searches:

Searches can be conveniently performed directly from the Trac Navigation bar in the top left corner. For each of the following examples, type the search term into the Trac Navigation bar. After you've entered your search, hover over the search glass and select the appropriate page to perform the search. For example, if performing a student search, click on the Students menu option after entering your search term into the Trac Navigation bar. If you are performing a search for Visits, click on the Visits link, and so on.

If searching for a student, you can either hover over the Search Glass after entering your search term and select the Students listing, or you can simply click on the appropriate student record that appears below the Trac Navigation bar to access the Student Record.

Find Student by Name: (last, first)
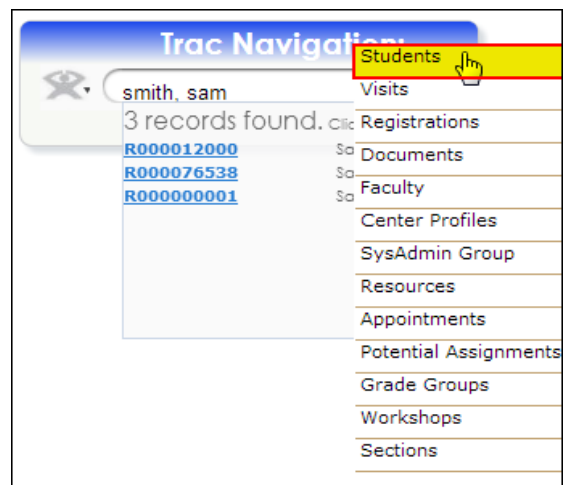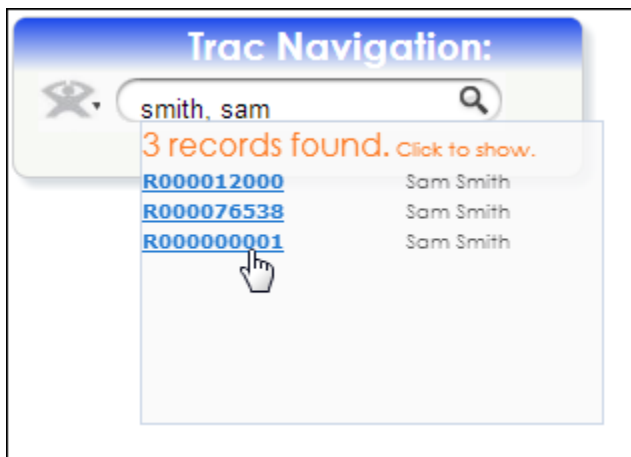
Find Student by ID #: (ID #)

Find Student by Username or Handle: (username)

Find student by City: (name of city)

Trac Navigation Visit Searches:

Searches can be conveniently performed directly from the Trac Navigation bar in the top left corner. For each of the following examples, type the search term into the Trac Navigation bar. After you've entered your search, hover over the search glass and select Visits. If you are already in the Visits Listing, you can simply hit Enter or Return to perform your search.

Find Visits by Student Name: (Student name)
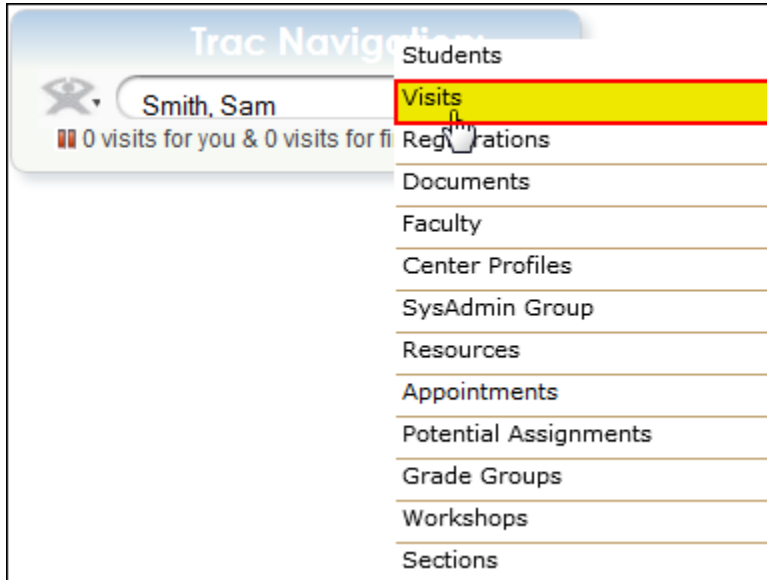
Find Visits by Date Range: (00/00/00...00/00/00)

Enter 2 date ranges separated by an ellipsis (...) to quickly search for Visits in ALL centers that occurred between these two dates.
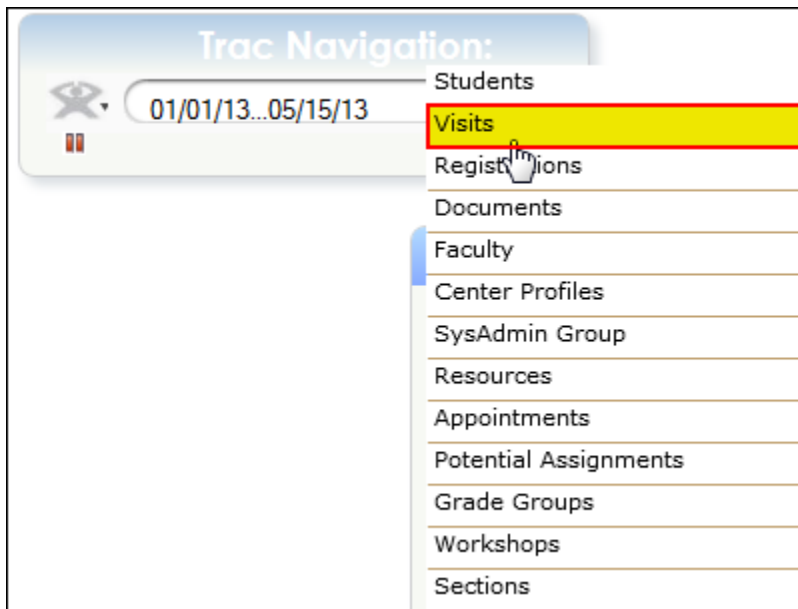
Find Visits by Predefined Date Range:
Options to choose from:

- Today
- Yesterday
- Tomorrow
- This Week
- This Month
- This 1st-15th

- This 16th – 31st
- Last Week
- Last Month
- This Semester
- Last Semester
- Next Week
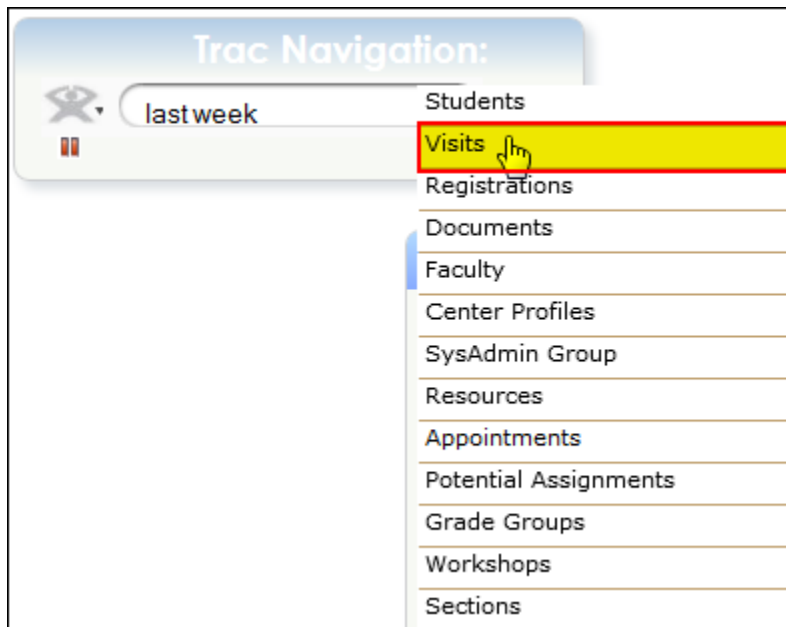
Find Visits by Center: (ctr=Learning Center@)
To find visits by center through the Trac Navigation Bar, type in the term "ctr=" followed by the name of your Center. For example, for our Demo Learning Center, we entered "ctr=Demo Learning Center", as shown through the following screenshot.

Search Options

There are several highly useful symbols that can make searches a bit more sophisticated. Keep in mind that these characters can be used in virtually every area within your Trac system, and may not be limited to searches.

Standard Search Options

@	is the Wildcard
=	is equal to
#	is not equal to
>	is greater than
>=	is greater than or equal to
<	is less than
<=	is less than or equal to
...	is a range of values, for example 1...100 is a range of all numbers from 1 to 100
;	is used between multiple REQUIRED phrases

Other visit field search options

rsn=	for a specific Reason
cons=	for a specific Consultant
sect=	for a specific Section
ctr=	for a specific Center

The Wildcard: @ symbol

The @ symbol is considered to be the "wildcard" character within the Trac system, meaning this symbol will be inclusive, depending on where the @ symbol is located.

For example, searching with the term "ENG@" will match any courses that begin with "ENG":

> ENG101, ENG 201, ENG 301-01A, ENG 501-05B, etc…

Basically, this search will find any English course.

Searching with the term "@101" will match any courses that end in 101 (keep in mind if section numbers – i.e. ENG 301-01A – this search will not return with any results):

ENG101, MAT101, COM101, MUS101, SPAN101, etc…

If you are trying to locate all "101" courses and courses include section numbers, search for the term "@101@" to locate courses that contain "101" in any section of the title.

As another example, searching for a student with a name of "@Sam@" will proceed to locate student records that contain the term "Sam" anywhere within the name field. These names might show in the results:

Sam, Samuel, Samantha, Sample, Samir, etc…

As a final example, searching for the term "j@son" will return with results:

Jackson, Johnson, Jason, Json, etc..

Equal To: = symbol

The equal to symbol is useful for many searches. Typically the Equal to symbol is used to find records with a Blank field. For example, if we are attempting to find all visits at a particular center with NO reason listed in the visit record, we can perform the following search.

First go to your Visit Listing by hovering your mouse over the Search Glass and selecting *Visits*.
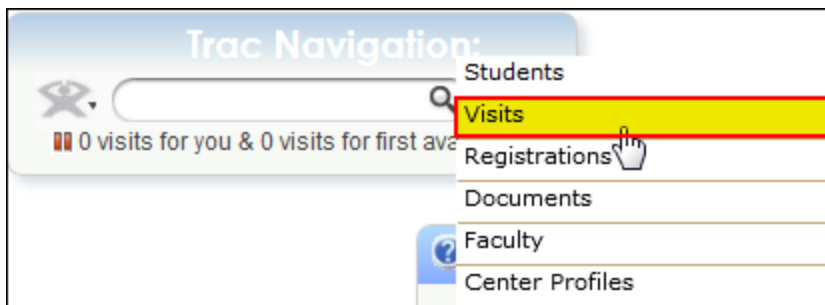
In the Visits Listing, select List Options > Search.
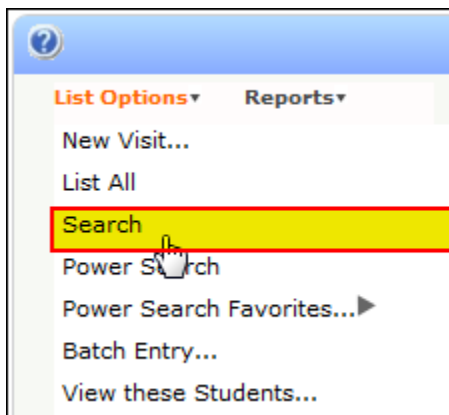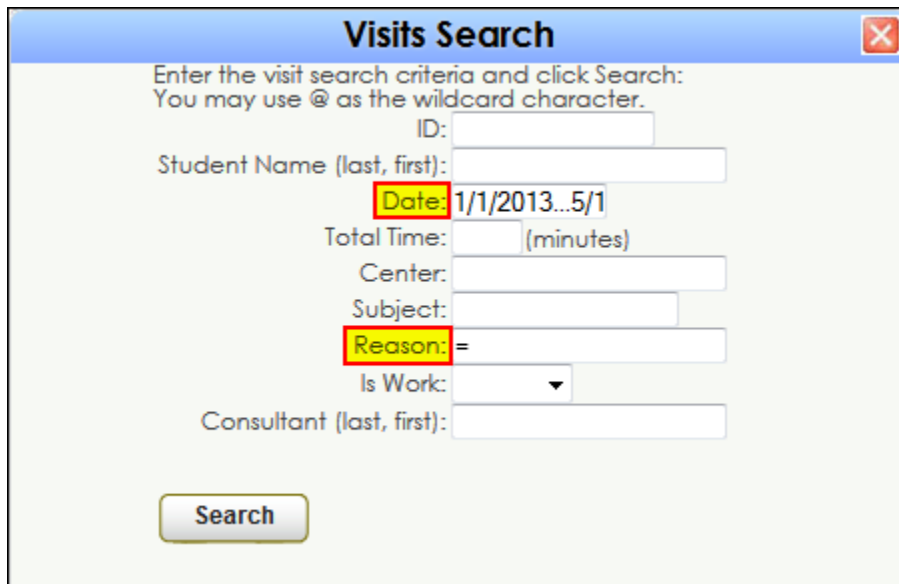
In the Visits Search window that appears, we can enter the relevant criteria for our search. If we wanted to find visits within a date range, we could for example, enter into the Date field:

1/1/2013…5/15/2013

In the Reason field, simply enter the Equal to character: "="

This will proceed to find all Visits with a Reason = or "Equal to" a blank field, or in other words, NO reason. This will also be functional for the Consultant field (if you are searching for visits with no Assigned Consultants), Center, or Subject.

Let's say for example that you are searching for Visits with a specific Reason. In this case, we will not need to enter the "=" symbol, as it is already implied through the search. Instead, we will simply enter the name of the Reason. For this next example, the reason we will be looking for is "General Advising".

Make sure that you type the reason exactly as it is defined, or if you are unsure, simply add the "@" wildcard symbol at the end of your search term for added flexibility. For example, if your exact reason title is "General Advising", entering "General@" will return results for the General Advising Reason.

NOT Equal To: # symbol

To continue with the previous example, let's say we wanted to find Visits made to our Demo Advising Center for the month of January for ANY reason that is NOT General Advising. Here we will utilize the Not Equal to symbol: #.

The system then returns with Visits made to the Demo Advising Center that were classified with ANY other reason than "General Advising".

ⓘ 351389	R000000001	Smith, Sam	1/8/2013	3:03 PM	10:24 AM	19.36	Demo Advising Center [56]	FAFSA Applications	Advisor, Demo
ⓘ 351413	R000000001	Smith, Sam	1/14/2013	3:47 PM	4:32 PM	0.75	Demo Advising Center [56]	Change Major	Doe, Jane
ⓘ 351395	R000001133	Shirley, Sandra	1/11/2013	9:13 AM	9:58 AM	0.75	Demo Advising Center [56]	FAFSA Applications	
ⓘ 351412	R000000001	Smith, Sam	1/14/2013	3:22 PM	4:07 PM	0.75	Demo Advising Center [56]	Change Major	Doe, Jane
ⓘ 351399	R000000001	Smith, Sam	1/11/2013	10:38 AM	11:23 AM	0.75	Demo Advising Center [56]	Change Major	Doe, Jane
ⓘ 351411	R000000001	Smith, Sam	1/14/2013	3:16 PM	4:01 PM	0.75	Demo Advising Center [56]	Change Major	Doe, Jane

One of the most useful searches that utilizes the Not Equal to # symbol involves setting a field # NOT EQUAL to blank. For example, if you want to find all Visits that HAVE a subject assigned to the record, we can simply enter a "#" symbol in the Subject field for a Visit search.

Performing this search will proceed to find all Visit records that have been assigned a subject.

Separation: ; semicolon symbol

When searching any Listing pages, you can use the semi-colon to utilize different fields in the search.

If, for example, you wanted to search for all students named Sam who live in Phoenix, type the following term in your Trac Navigation bar: "Sam; Phoenix". After you've typed this, hover your mouse over the search glass and select Students.
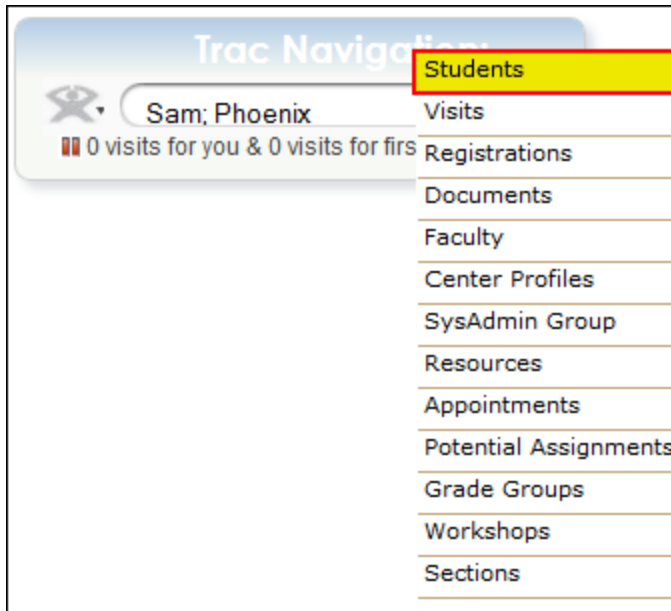
For example to find everyone named Sam visiting the center called Demo Learning Center from 1/1/2013 to 2/1/13, type: **Sam; 1/1/2013…2/1/2013; ctr=Demo Learning Center,** then hover your cursor over the Search Glass and select *Visits*.
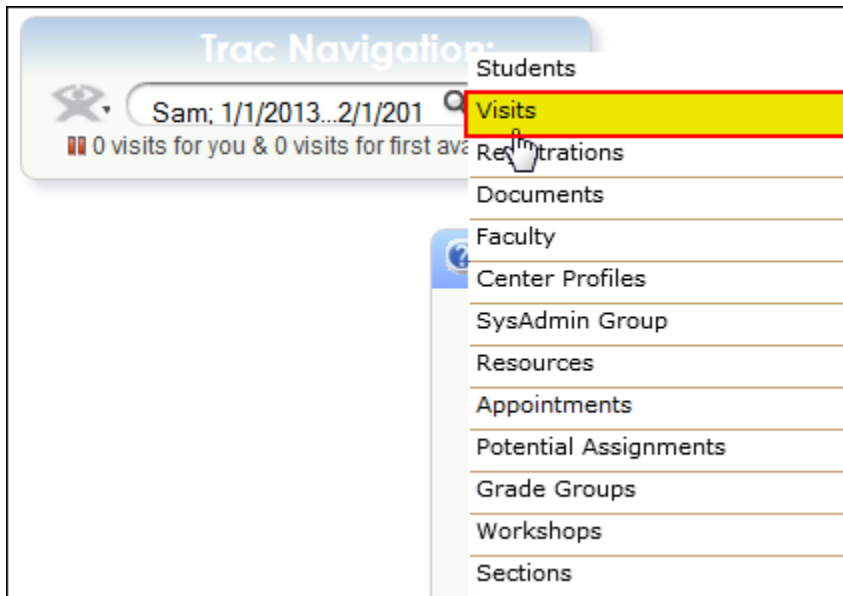
Greater than and Less than: > and < symbols

For this example, we want to run a search for Visits in which the duration of visit is less than 30 minutes. The date range was entered to search Last Week, the time range is less than or equal to 30 minutes and for the reason "home@". This search will list all the students that had a visit since last week for less than 30 minutes and for homework as the reason.

Standard Search: Date **Last Week**   Total Time **<= 30**   Reason **Home@**

Bar or Pipe: | symbol

Power search for Math sections but only want 3 of 10.

Power Search

The Power Search has different fields for students and the option to add the students on a list. To locate the option go to the Student Listing then click on List Option and select Power Search. The Power Search displays different fields and the option to add more by clicking the Add Line link. An example is having the first field selected for GPA, the greater than or equal to 3.0 GPA and the next line is for Grade, A through C have been entered. These fields are looking for all students with a GPA 3.0 or higher and grades C or better.

Standard Search: **GPA >=3.0 and Grade A...C**

For more information on the Power Search, contact RedRock support for details (support@go-redrock.com)

Utility Search

Find Duplicates

The Find Duplicates Tab will allow you to find records that have the same value in a particular field. Choose a field, for example the Last Names and click Find Duplicates. This will list all the student with the same last name in alphabetical order.

Find by Value

The Search Utilities will benefit when there is an external list of student and the Find by Value Tab can add those student by copy and paste or entered manually. For example in the Find by Value tab the field is ID and in the Value are three ID in each line with no space. This search will list the three ID in the Student Listing.

Find by File
The Find by File Tab will allow you to find records that have matching values listed in a file. Choose a field for this example ID was selected, the text file that was added was a Text Pad Document, and click Find by File. The file must contain a list of values separated by a carriage return (cr) or a carriage return & line feed (crlf) combination saved as ASCII text.
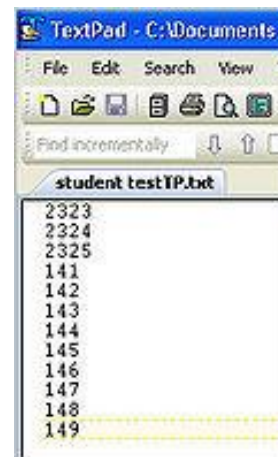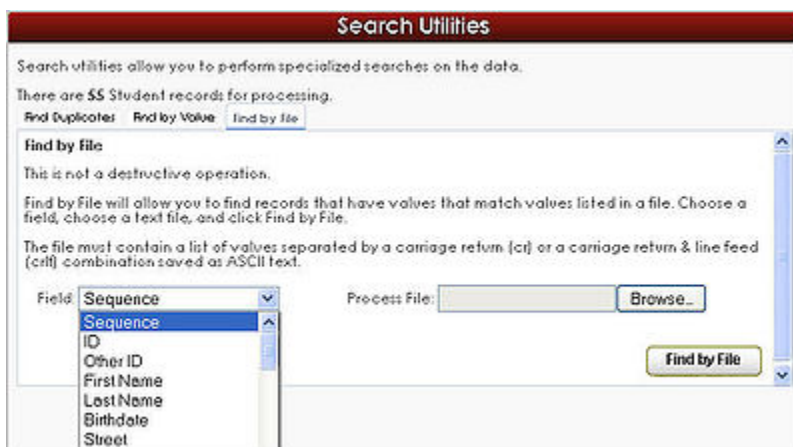
		ID	Name	Last Date In
Referral	🚩 144		Alger, Tanner N	5/2/2011
Referral	🚩 142		Buig, Rachel N	5/2/2011
Referral	🚩 146		Bradford, Asiah A	5/2/2011
Referral	🚩 149		Brown, Sarah K	5/3/2011
Referral	🚩 147		Combs, Kimberly R	5/2/2011
Referral	🚩 143		Dear, Tarsha N	5/2/2011
Referral	🚩 2323		Doe, Jane	4/15/2011
Referral	🚩 145		Hess, Brittney A	5/2/2011

Chapter 20: SAGE

SAGE, or Student Alerts and Group Events, is an additional module available for your Trac system and may be added to your Trac 4.0 system to add new features and enhance the capabilities of your system. The SAGE Early Warning module allows your faculty to submit referrals, progress reports, or evaluations for the students in their courses. SAGE has become an integral tool for many campuses typically in regards to retention programs, SI programs, and even as an Early Alert system for At-risk students.

Creating SAGE Referrals

Locating SAGE Management

Once the SAGE Module has been activated on the Trac 4.0 System you can access the SAGE Management Tools from the Trac Navigation box by clicking on the Trackman Icon and selecting "SAGE Management…"

Creating a new SAGE Referral

Select the "SAGE Referral Types" tab in the SAGE Referral Management window. This will display a list of all existing SAGE Referral Types. To create a new SAGE Referral Type, click the *Create New* button, located in the upper left hand corner of this window. This will open a blank SAGE Referral Type form.

- **Assigning a Referral Type**

Assign the Name of your Referral in the *Type* field of the SAGE Entry form. The Type will be the title of your referral and will be how your Referral will be referenced by users and in reports.

- **Active Checkbox**

The Active checkbox sets the referral as active and available in the system. It must be checked if the referral is to be available. When Unchecked, the Referral is no longer an option for your users. However, even while inactive users will still be able to search for referrals of this Type.
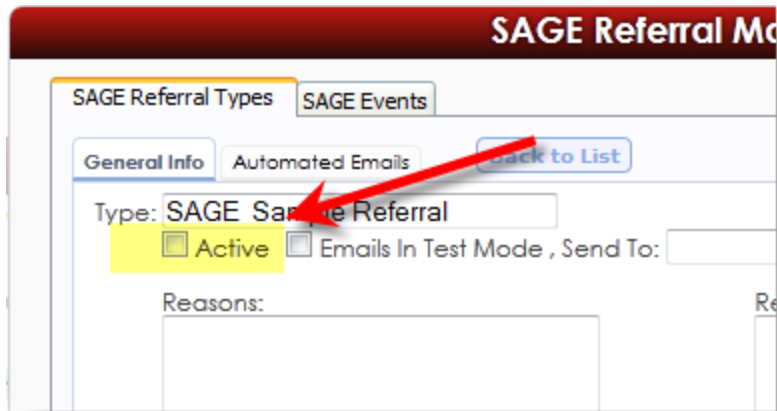
- **Emails in Test mode**

When setting up your SAGE referral Type you may want to test emails that you have created. By checking the *"Emails in Test Mode box"* and entering an email address you can safely test your Referral Type without actually sending emails to the designated recipients. Rather the email specified in Send To: will receive a copy of all your emails. When you are ready to put your SAGE Referral Type into production uncheck the "Emails in Test Mode" box to allow SAGE to send to the correct recipients.
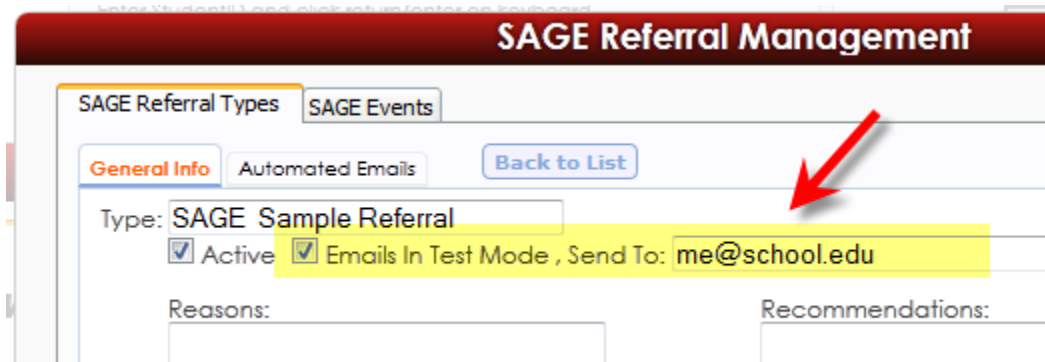

- **Entering Reasons**

The Reasons Entry box allows users to enter Reasons that this particular Referral Type might be generate for a Student. Each Reason will be represents by a checkbox that the end User will be able to check if they apply to the student in question. Reasons are not required in a Referral.
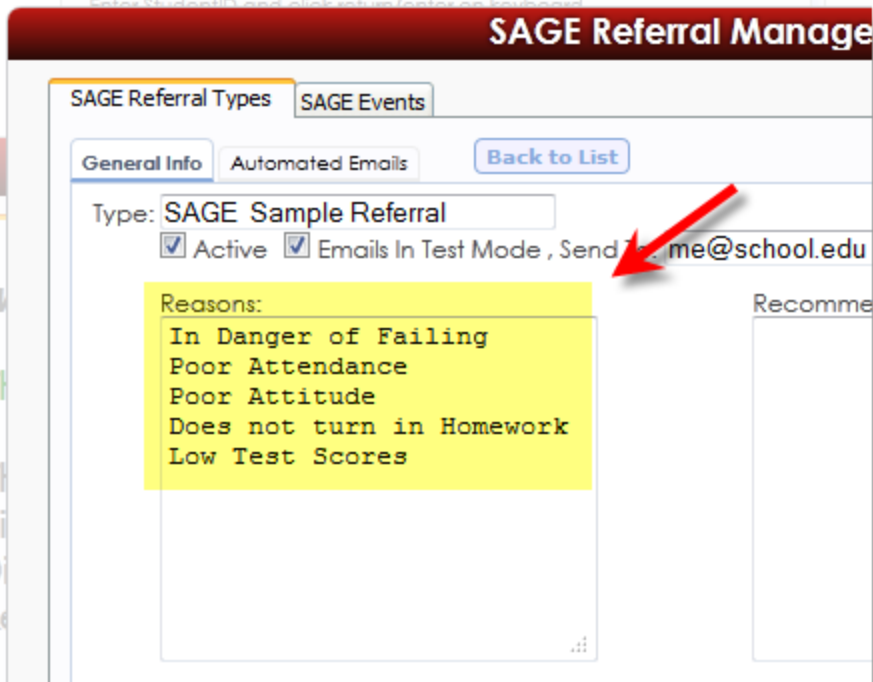
- **Entering Recommendations**

The Recommendations entry box allows users create recommendations for a particular Referral Type. Each Recommendation will be represented by a Check box. These Recommendations can then be selected by the end User filling out a SAGE referral for the student in question. Recommendations are not required in a Referral.
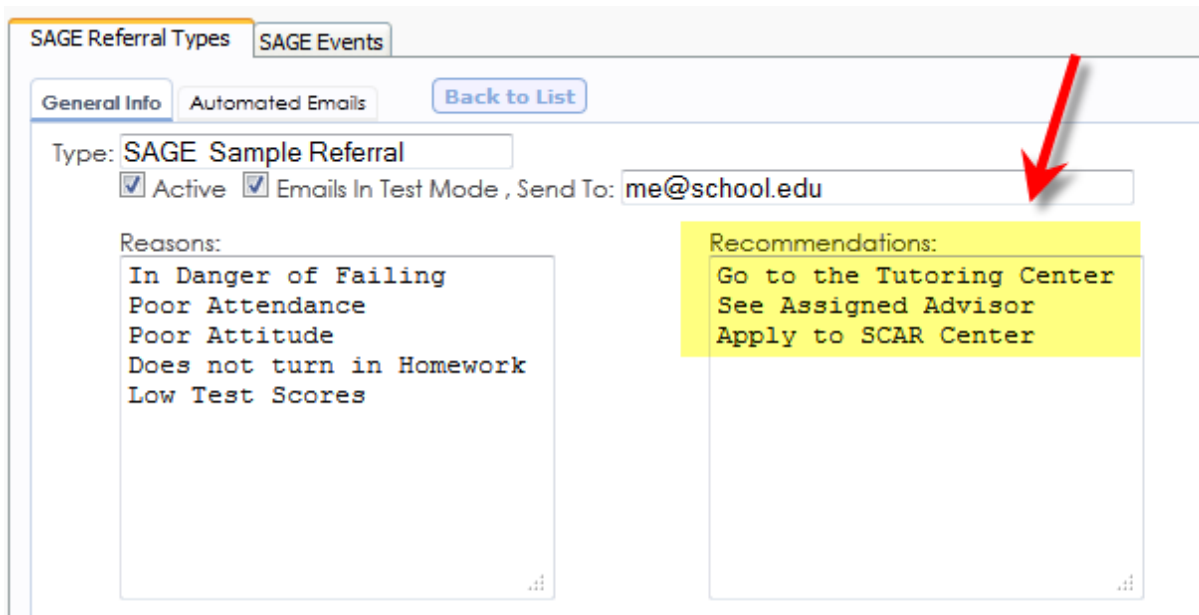
- **Creating Custom Questions**

Clicking Custom Questions allow you to create a question in your SAGE Referral Type. This will provide the end user a Fill-in box for each question added.

To create a Custom Question click Add New

You will then have and entry box with three fields.

- o **Question**: Type your Question here
- o **Code:** The Code will serve as a Tag to that you can reference this question and its answer in custom SAGE emails. The Code can be any designation such as "Question1", "q1", etc.
- o **Type :**
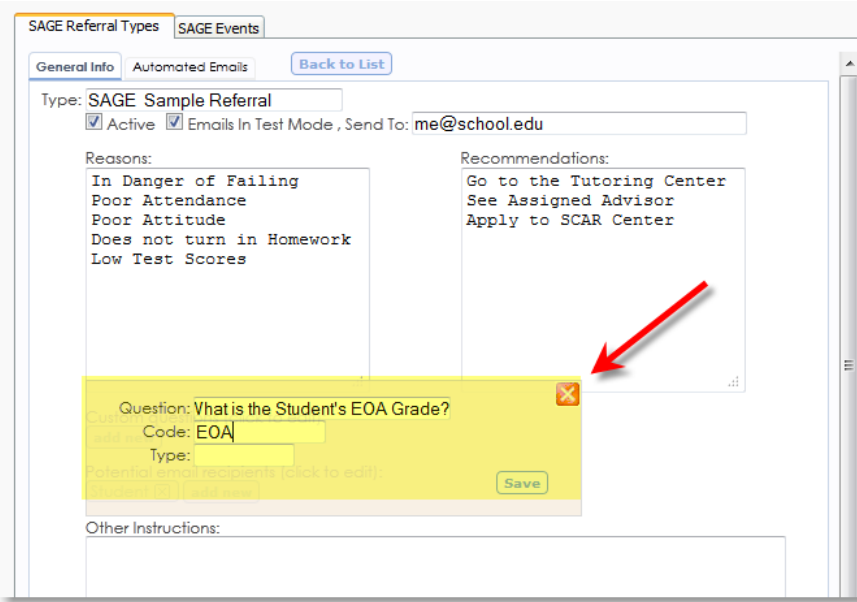
- **Adding Potential Email Recipients**

Potential Email recipients allows the User to define who will be receiving SAGE alert emails. If an end user needs to receive an email of the SAGE referral a Potential Recipient Email will needed to be added. To add a Recipient click the *Add New* button
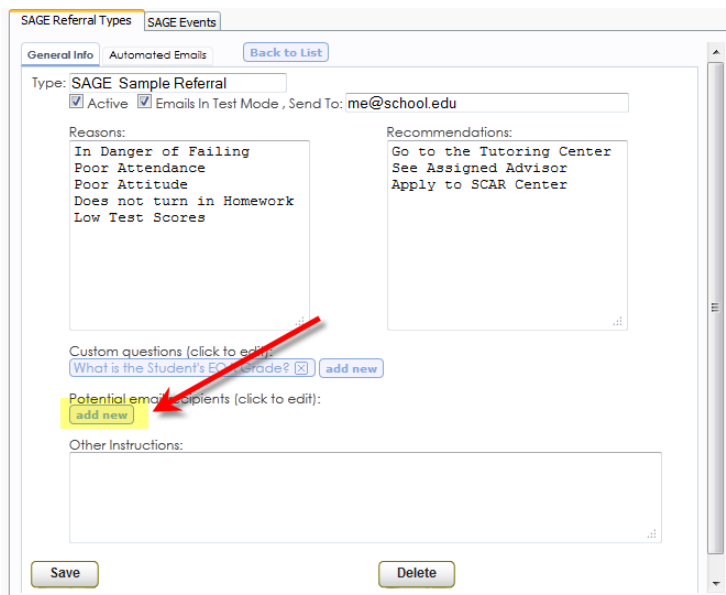
Name field: Enter the name of the email recipient
Email Field: Enter the email of the recipient. This can be an email address such as "name@school.edu" or a Tag that refers to an email elsewhere in the Trac program, i.e. #studentEmail#.
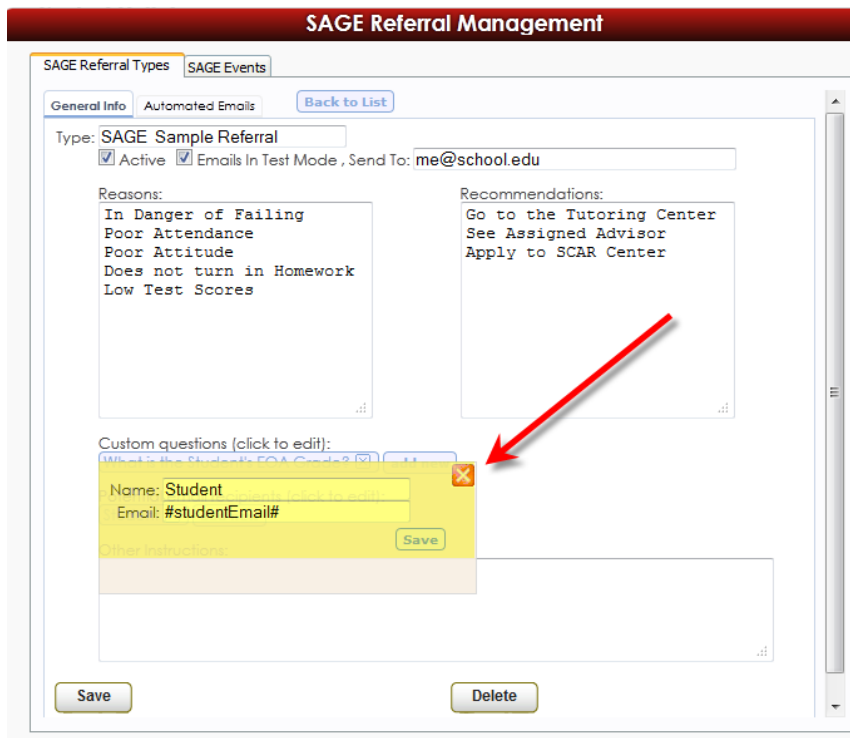
There are also some custom Tags that can be entered in the Email field as well.

#prompt#: Will display a email entry box on the referral form. Entering an email here can send the recipient one or more custom email messages.

#FacEmail#: This will email a copy of the referral to the Faculty member who creates the referral. This option only works if your Referral type is created by Faculty. If other types of users create a Referral the Faculty will not receive an email.
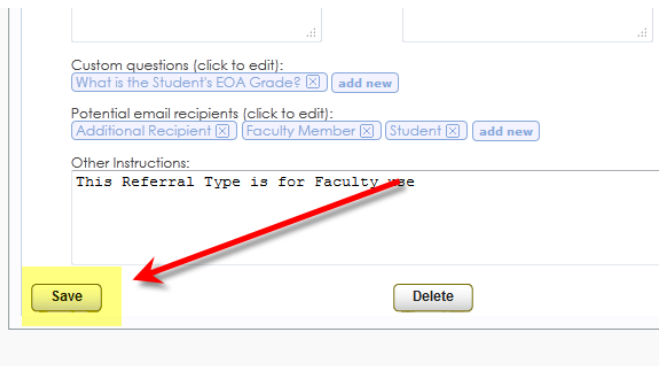
- Adding Other Instructions.

Other Instructions can be added in as additional text or serve as notes or instructions on how this Referral Type is to be used.
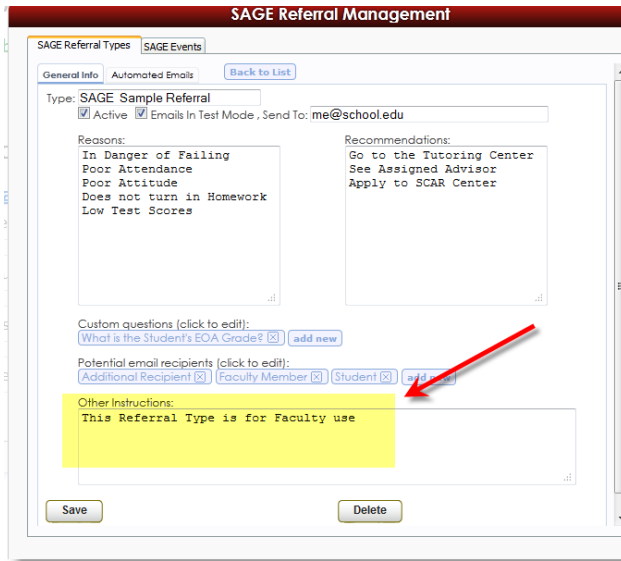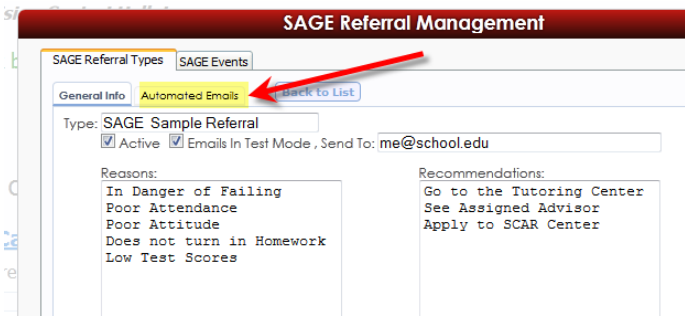
Saving your Referral Type

Click SAVE to save any changes to your Referral.

Automated Emails

The Automated Emails tab allows you to create custom emails that can be sent to one or more of your Potential Email Recipients. This feature allows you to create multiple email tpes that can be customized by selections made in the Referral, properties of the Students themselves or other triggers.

Common examples might be a custom email that is sent to the student when a Referral is created for them. Faculty or Trac Users might also receive different versions of the same email or entirely different emails.
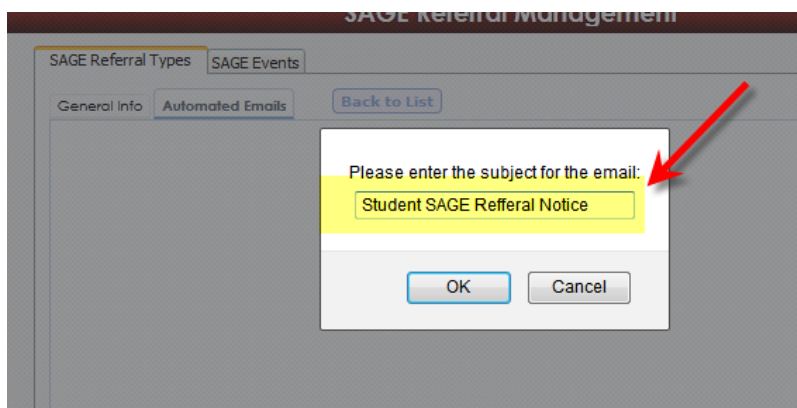
Creating a basic email

We will walk through creating a Custom email to be sent to the student when the referral is created.
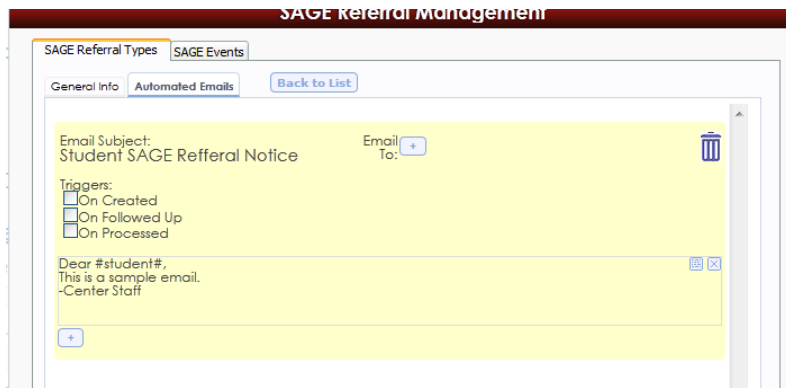
Click Create new email...
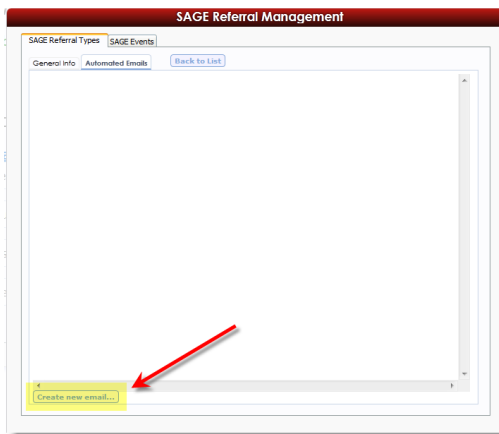
This will open a dialog box to enter the Subject of this email. Enter a email subject and click OK.
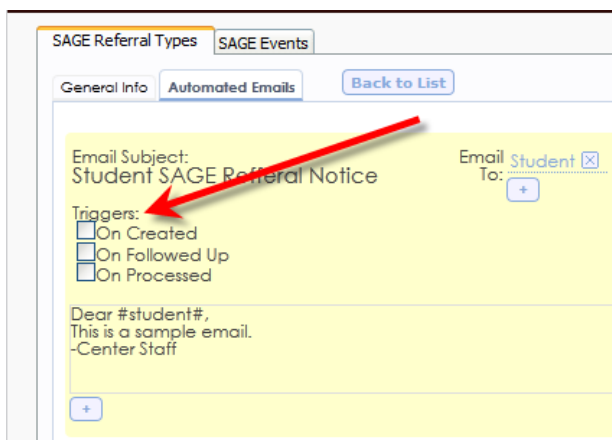

This will create the email form that the user can then customize.

Add Email Recipients: Click the + to add one or more email recipients. The List of Recipients will contain all of your Potential Email Recipients that were created on the "General Info" tab. Select the Recipients
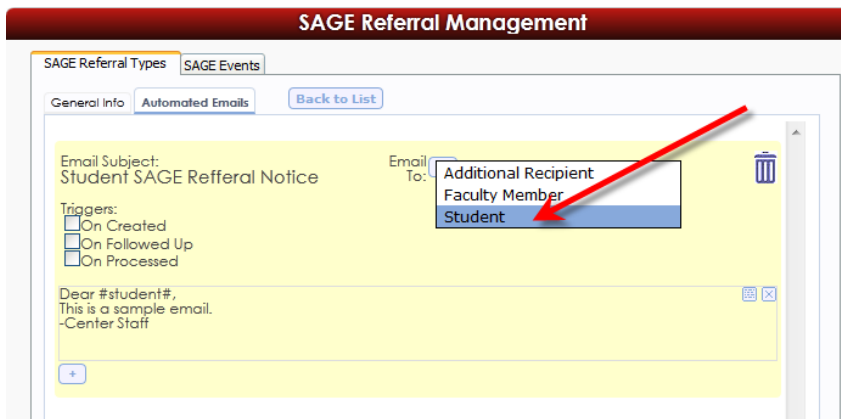
Triggers: This will govern when the email is sent. You have three options.


- **On Created:** This email will be send when the SAGE Referral is initially created(saved).
- **On Followed Up:** This email will be sent when a Followed Up name is entered and the SAGE Referral is saved.

- **On Processed:** This email will be sent when the Processed checkbox is checked and the SAGE referral is saved.

Editing the Text Block

To Edit the Text box click on the Edit icon in the top right hand corner of the Text box.
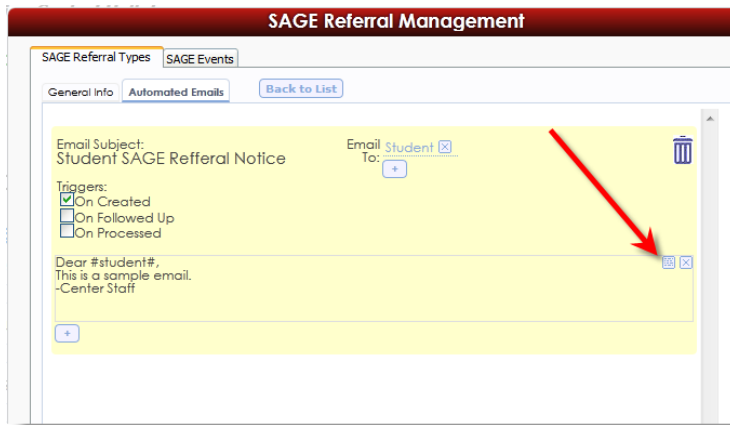
The Text box contains the text of your email message. In addition to text you can also include tags that can populate information that is contained in TutorTrac.
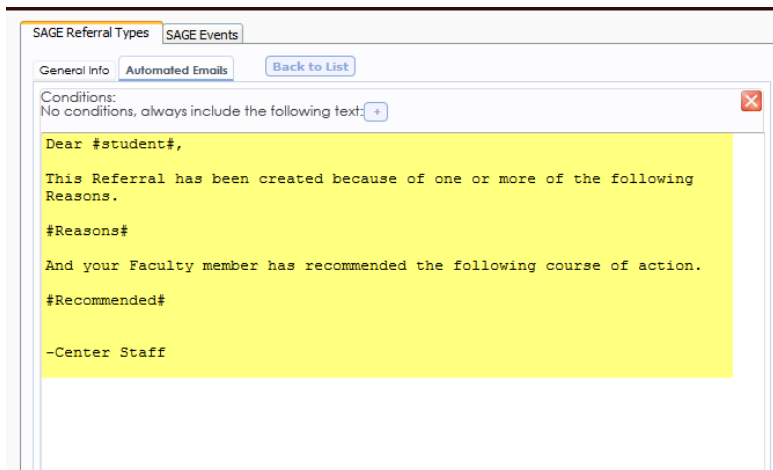
Below is a list of Tags that are currently available in SAGE

Student Fields
Student ID: #ID#
Student Name #name#
Student First Name #first#
Student Last name #last#

Student Email: #StudentEmail#
Student Custom 1: #Field1#
Phone #phone#
Date #date#
Time #time#

SAGE Referral Fields

Reasons:

#Reasons#
#sagerereasons:formatted#
#sagereasons:plain#

Recommendations:

 #Recommended#
#sagerecommended:formatted#
#sagerecommended:plain#

Subj: #refSubject#
Type: #refType#
Date: #refDate#
Time: #refTime#
Notes: #refNotes#
Additional info: #refAddlInfo#
FollowupDate: #refFollowUpDate#
Followup by: #refFollowUpBy#
Processed: #refProcessed#
Precessed Date: #refProcessedDate#
Processed by: #refProcessedBy#
Processed Notes: #refProcessedNotes#

SAGE Custom Questions
#refQuest:code#   (NOTE: Code should equal the Custom Question's Code Field)

This tag will display the result to a Custom Question. The specific Question's Code should be entered after the **refQuest:**
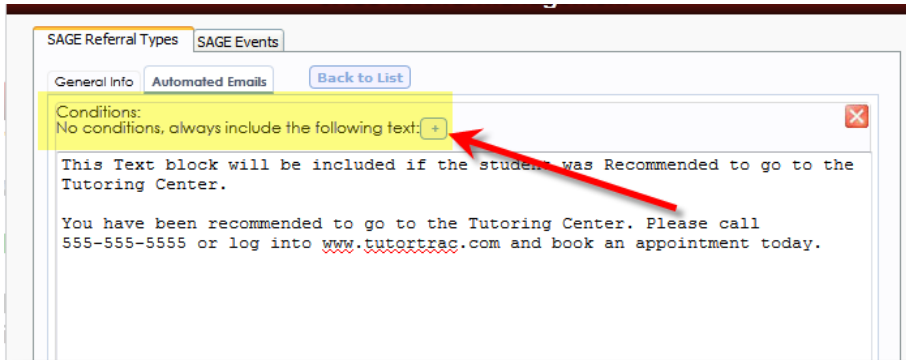
SAGE Custom Tag Script
#prefValue:customTagScript#   This Tag requires customization by Redrock Software.
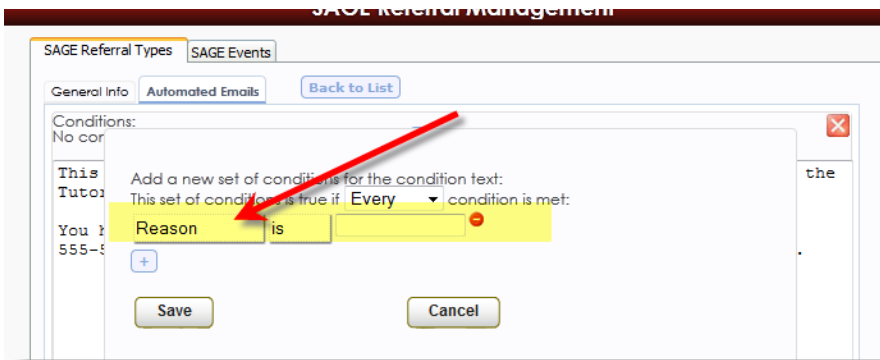

Conditional Text Blocks
A Text block can also be conditional, only appearing in the email if a certain criteria is met, such as a particular Reason or Recommendation is checked.
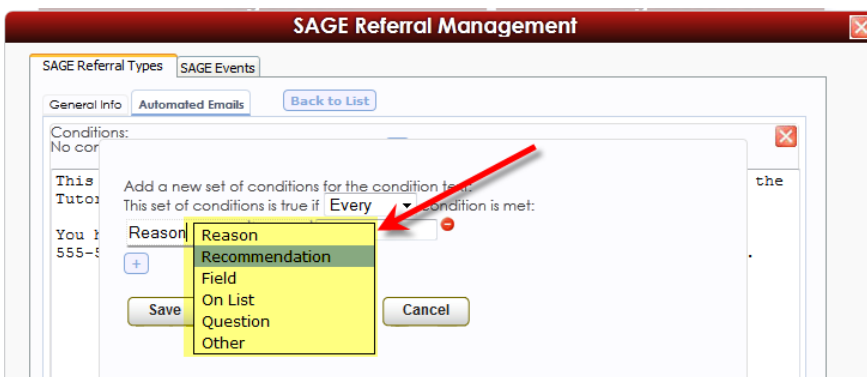
Click on the "+" sign

Click Reason to view the dropdown of choices

Select the Condition for this text box.

Options include

- Reason: From the SAGE Reasons checkbox field
- Recommendation: From the SAGE Recommendations checkbox field
- Field: A data field in the student record.
- On List: If the Student is on a Student List
- Question: Response from a Custom Question
- Other: Customized by Redrock

Once you have selected the Condition you can set the value.

Once the Condition (or conditions) are set the specified text block will only appear in the SAGE email is the Condition is met, otherwise the Text block will not be included in the email.