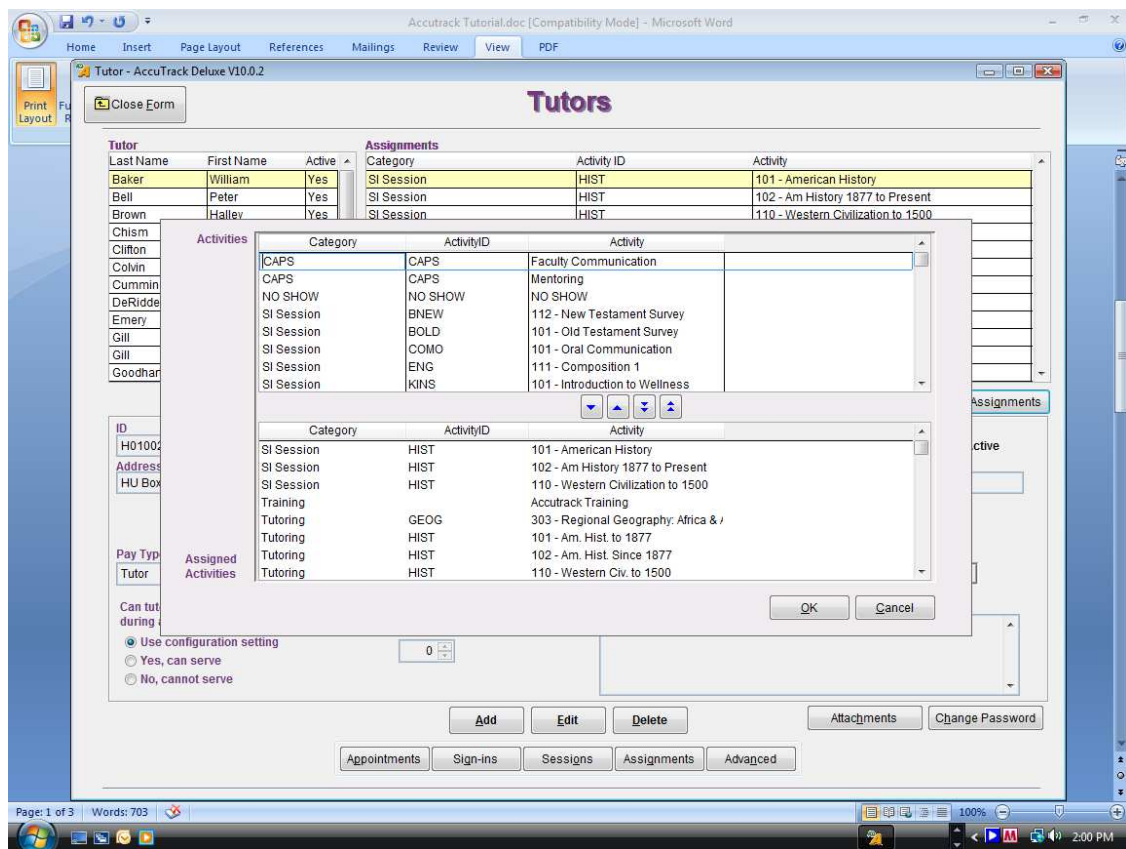


AccuTrack Training Tutorial & Set Up

- Log into Accutrack under ADMIN: **888-88-8888**, password: **help** (lowercase)
- Click the + sign to expand each option that you see on the list
- Goto **SETUP>TUTOR SETUP>TUTOR>ADD** button.
- Enter your INFORMATION in the following FIELDS

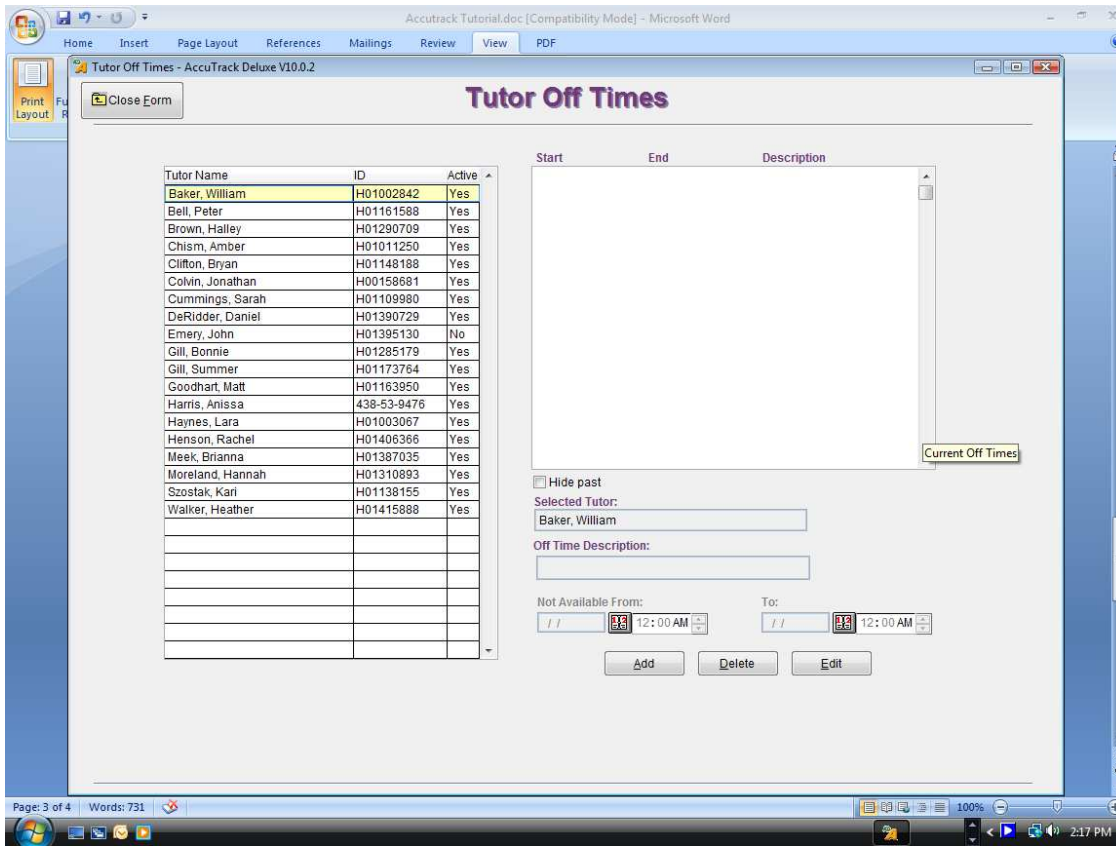
- **ID**=Harding ID number, include the “H,” and the 8 digits following (usually you omit the last two digits which indicate the number of semesters you have been at HU)
- **FIRST NAME/LAST NAME**
- **EMAIL**: Use Harding Email address (if you do not check your Harding email, then make sure you **FORWARD** your Harding email to the address that you do check. This way you will always get your messages from me as well as from other HU administrators).
- **ADDRESS**: Use HU Box number or LOCAL address
- **PHONE/NOTES**=Please note that there are multiple phone blocks. Please put the numbers **where you can be reached at** school. If you do not want me to use your cell phone routinely, please make a note of it in the NOTE section. Please check “**do not send SMS**” if you don’t want me to text you, as that is a great way for me to contact you with a last minute question or appt if available. Note if you don’t have texting or voice mail.
- **CARD ID**: Enter your H# again (capital H with 8 digits)
- **Pay Type**=tutor
- **Pay Rate**=\$7.25

- **SAVE** your PROFILE Information. On the **SAME SCREEN**, select **ADD/REMOVE ASSIGNMENTS** (on right side under the Assignments grid).



- Select the subjects you would like to tutor by **ACTIVITY**. You can click on multiple choices by using **CONTROL** and clicking the mouse simultaneously.
- Add them to the box below using the **DOWN/UP** arrows.
- You can select any Tutoring Activity (course) in which you have earned an A or B or clepped/tested out of. Also, if you have taken a **HIGHER** level course (math for instance), it is assumed you can tutor the lower level courses you did on take (ie. A calculus tutor can tutor pre-algebra.). Read through the **ACTIVITIES** to see which you can tutor.
- **SAVE** by clicking **OK**. Exit this screen by clicking on **CLOSE FORM** in upper left hand corner.
- Now select **SCHEDULE** (You are still under **SETUP>TUTOR SETUP>TUTOR SCHEDULE**). If this screen is not completed and saved, you will not have a work schedule show up. As a result, your name will not be displayed when I am choosing tutors for appointments. Also note, you cannot schedule a tutoring appointment for an hour that is not indicated on this schedule (it will be “grayed out” when available times are displayed).
 - Note: the buttons at the bottom of the screen. After you input your schedule and have had a few appts, come back to this screen and explore these options.

- Your name should now appear on this screen. If it does NOT, you did not SAVE while in **TUTOR SETUP>TUTOR (go back and do so if needed)**.
- Your **ASSIGNED TASKS** should reflect the courses you want to tutor. If they do not appear here, your name will not show up when I am setting appts. If you do NOT have any **TASKS** listed in this frame, please return to the previous step.
- Select a **RANGE OF TIMES** you wish to tutor on each day under **HOURS** (select and hold down the shift key while dragging the mouse). Drag and drop the time into the appropriate day of the week box. You can enter isolated hours or a range of time. **THE MORE TIMES YOU ARE AVAILABLE, THE MORE APPTS YOU CAN GET.** Also, students tutor minimally before chapel, with peak times from 10-5p. Athletes prefer evenings up to 9p. These hours will be the **ONLY** ones I can set appts during.
- **SAVE:** If you do not SAVE or enter a schedule here, your name will NOT appear when I am setting appts.
- **NOTE:** the **HISTORY & APPOINTMENTS** buttons. Once you have some history in the system, you can evaluate here. Explore these buttons later. **CLOSE THE FORM** when you are done.



- **SETUP>TUTOR SETUP>TUTOR>OFF TIMES**

- Note this screen.
- You can use it to schedule specific ranges of time that you will NOT be available to work. You might use this option if you were going to be out of town for a lectureship or if you did not want to tutor at all during Spring SING, etc. You must manage these dates at your discretion. It is just another management tool. **CLOSE THE FORM.**

The screenshot shows the 'Modify Students' form in the AccuTrack software. The form is divided into several sections:

- Student Identification:** Fields for ID, First, Middle, Last, E-mail Address, and Card ID.
- Contact Information:** Fields for Address, City, State, Zip, Phone (Home, Cell, Other), and Phone note. There is also an 'Active' checkbox.
- Student List:** A table with columns for Student Name, Student Id, and Active Card Id. The list includes names like Adams, Kathryn; Alfani, Madison M; Allen, Justin; etc.
- Form Fields:** A series of dropdown menus for Program of Study?, Degree?, Classification?, Age?, Gender?, Ethnic Background?, Major?, Sponsoring School District?, Enrollment Status?, and Total Credits Completed?.
- Buttons:** 'Revert', 'Save', 'Attachments', and 'Change Password'.
- Navigation:** A row of buttons at the bottom: 'Appointments', 'Registration', 'Visits', 'Tutors', 'Groups', 'Tutoring Requests', 'Seminars', and 'Advanced'.

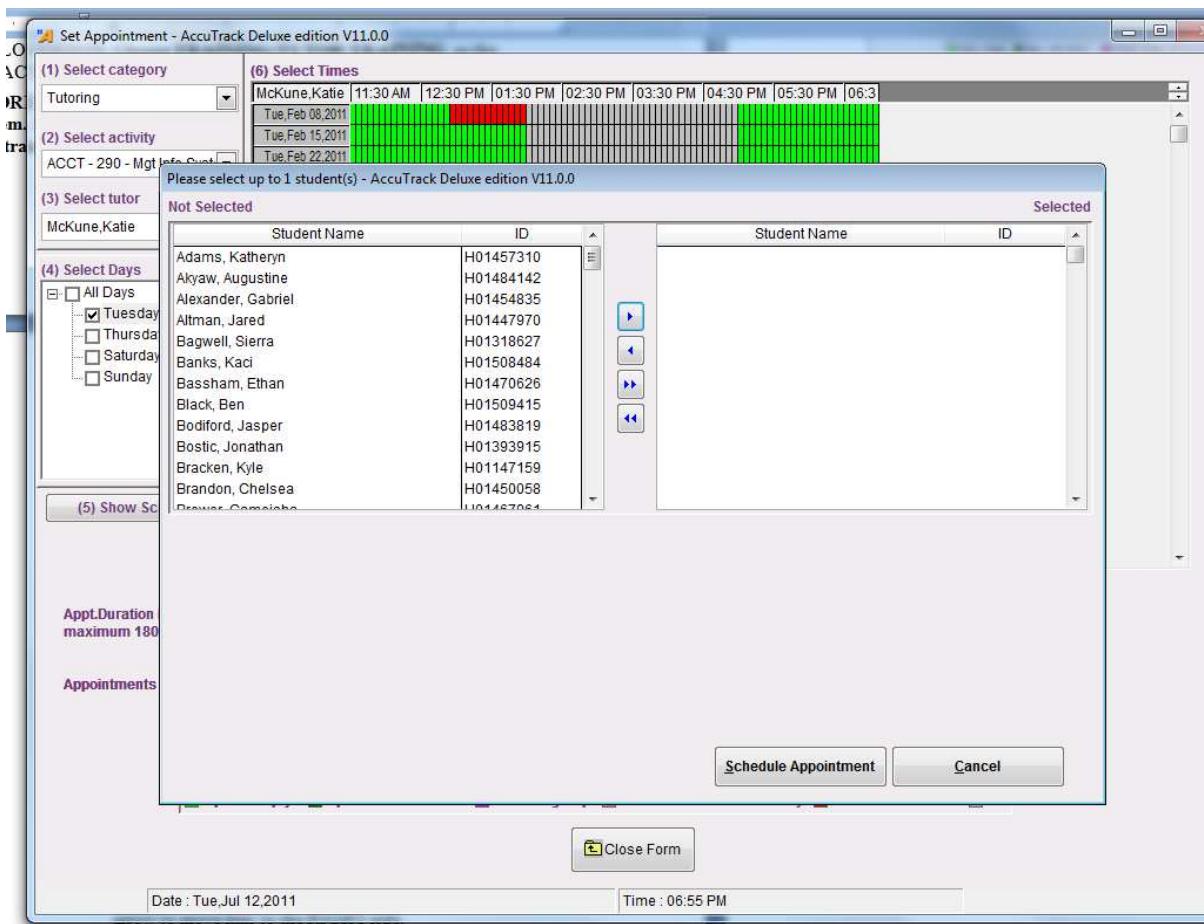
- **SETUP>STUDENT SETUP>STUDENTS>**
 - Note that this screen is similar to **TUTOR SETUP**.
 - You may come to this screen to get a **CLIENT**'s **PHONE NUMBER** or email.
 - View other options in this section just so you are familiar with them. **CLOSE THE FORM**.
- **Close ACCUTRACK by clicking RETURN TO SIGN IN SCREEN.**
- Try to log back into AccuTrack using your H# or sliding your ID.
 - Try logging in and out with your HU ID card in the reader (slot at the top left of the keyboard). Choose **LOG IN AS STAFF**.
 - Make sure it works. You will need to do the following while you are **LOGGED IN**. Choose **TRAINING>TUTOR TRAINING** as the **ACTIVITY** that you are registered for by clicking **SIGN IN**.
- **EXPLORE OTHER AREAS: Please view these areas and become familiar with them. Make a note of any specific questions you may have about them for our training.**
 - **ENTER YOUR H#** again (either by typing or using your card)—remember, you are already signed in, so just select **ADMIN** (on the **LEFT** side).

- Select the **ADMIN** button. Go back to **SETUP>TUTOR SETUP>** and under the appropriate **>TUTOR** and **>SCHEDULE** subcategories, verify the following:
 - **Personal information**
 - **SETUP>TUTOR SETUP>TUTOR>ACTIVITIES** (courses you can tutor)
 - **SETUP>TUTOR SETUP> SCHEDULE** (listed by day under the **SCHEDULE** tab).
 - **SETUP>TUTOR SETUP>OFF TIMES:** Use only if you have a one-time conflict in your normal schedule or if out of town etc. You can add any **OFF-TIMES** at this juncture if needed.
 - Make any additions or changes to these items at this time.
- View **STUDENT SETUP>STUDENT** under **ADMIN**.
 - Please find the information for **Mr. Sample Student** in the list. This is just to make sure you know how to do it. **CLOSE FORM**.
- Visit the **APPOINTMENTS** tab to set a **PRACTICE APPOINTMENT**.

The screenshot shows the 'Set Appointment' window in AccuTrack Deluxe edition V11.0.0. The window is divided into several sections:

- (1) Select category:** A dropdown menu set to 'Tutoring'.
- (2) Select activity:** A dropdown menu set to 'ACCT - 290 - Mgt Info Syst'.
- (3) Select tutor:** A dropdown menu set to 'McKune, Katie'.
- (4) Select Days:** A list of days with checkboxes. 'Tuesday' is checked, while 'Thursday', 'Saturday', and 'Sunday' are unchecked.
- (5) Show Schedule:** A button to view the schedule.
- (6) Select Times:** A calendar grid showing dates from Tue, Feb 08, 2011 to Tue, Jul 05, 2011. The grid has columns for times: 11:30 AM, 12:30 PM, 01:30 PM, 02:30 PM, 03:30 PM, 04:30 PM, 05:30 PM, and 06:30 PM. A red bar is visible on Tue, Feb 08, 2011, between 12:30 PM and 01:30 PM. A blue bar is visible on Tue, Mar 22, 2011, between 12:30 PM and 01:30 PM. Most other cells in the grid are green.
- Selected 1 day:** A field showing 'Date: From [Tue, Apr 05, 2011] To [Tue, Apr 05, 2011] Time: From [12:10 PM] To [01:15 PM]'.
- Appt. Duration is minimum 25 minutes and maximum 180 minutes**
- Appointments can start at 5 minutes increments**
- (7) Set appointment:** A checkbox for 'Exclusive' is checked. Below it is a 'Set Appointment' button.
- Legend:** A row of colored boxes with labels: Open - empty (green), Open - with others (dark green), Closed - group (magenta), Reserved - different activity (red), Closed - exclusive (dark red), and Off (grey).
- Close Form:** A button at the bottom center.
- Date:** Tue, Feb 08, 2011
- Time:** 05:55 PM

- By using the **SET APPOINTMENT** option, set yourself an appointment with **Mr. Sample Student** for any time you are available, in any subject you selected to tutor. (You can also use the **APPOINTMENT WIZARD** option to set appts, but I use it less frequently. If you use the **WIZARD**, you will have to select the **NEXT** button after each screen).
- To set an appt, you must choose the following:
 1. **SELECT CATEGORY:** Tutoring
 - **SELECT ACTIVITY:** Although ALL the classes we tutor will show up on under the “**Select Activity**” option, select a course you signed up to tutor. Your name will only be listed under the **ACTIVITIES** you chose. If your name is not an option under the **ACTIVITY** you selected, return to **TUTOR SETUP** and troubleshoot.
 2. **SELECT TUTOR:** Your name
 3. **SELECT DAYS:** (all days)
 4. **SELECT TIMES:** Remember, only times you put in your **SCHEDULE** will show up. GREEN times are Available to tutor. Gray times are UNAVAILABLE or OFF TIMES (shown in drop down menu if you are using the **WIZARD** to set appt). Make sure these look right. The small rectangles are 5 minute increments. Drag your mouse over the time you desire for the appt.
 5. **SET APPOINTMENT:** Click the button at bottom right.
 - **The Screen will change to this:**



- Select **Mr. Sample Student** by clicking and using the arrow to move him to the RIGHT side.
- Select **SCHEDULE APPOINTMENT**. At this juncture you will see the EMAIL message flash in the top right corner of the screen.
 - If you did it correctly, **you will receive an email** with the appointment time and location. Since Mr. Sample Student has the same email address as me, I will also get an email indicating you set the appointment correctly.
 - Once you complete this tutorial, **check your EMAIL and REPLY to the message confirming that you received the appointment.** (Doing so let's me know your email is set up correctly to receive tutoring appts).
- **CLOSE THIS FORM** and select **VIEW/CANCEL** under **APPOINTMENTS**. Please find the appt you just set with yourself and **Mr. SAMPLE STUDENT** in the list. Please **RESCHEDULE** it for a different time by following the screen prompts and the above cues for setting an appt. Once you have done so, you will get an email **RESCHEDULING** your appt. You can look for it later.
- **The RESCHEDULED APPT** time should now show up in the VIEW screen of the appt list (**APPOINTMENTS>VIEW/CANCEL**). FIND it.
- Now, **CANCEL this APPT** by following the screen prompts. Look on the bottom LEFT of the screen and select WHO is cancelling the appt (the ADMIN, TUTOR, or STUDENT. For this exercise, you can select ADMIN or TUTOR). For the **REASON** type "I am practicing so I can be a tutor" and put your name in the message. The cancel info helps me track if students or tutors are cancelling appts last minute etc. It also allows a way to document if an appt was set by mistake etc.
- I will get copies of all 3 APPT emails so I know you know how to do it. ☺ **CLOSE THIS FORM.**
- You are done with **APPOINTMENTS**. Look down the list and check out the next couple of items . . .
- Select the **MESSAGING CENTER**—allows email messages to pop up when a tutor or student signs into ACCUTRACK. Also, provides an INTERNAL way to email me regarding a NO-SHOW or student session. Please read them if one shows up when you log in. You could leave a message for a client if needed. You do not need to do anything here. Just look around. **CLOSE THIS FORM.**
- Select **RETURN TO SIGN IN SCREEN** at the bottom. You will see the Log In Screen again.
- Re-enter your H# or swipe your card.
- Choose **SESSION LOG** beneath the **ADMIN** button. Session Logs will be available AFTER you have an appointment. At the close of each session, there will be an open spot in the bottom where you can type information about your session. We will discuss SESSION LOGS in Training as well as the required info to go here. Just know you will type info here at the end of each session.
- Also be aware of the following on the LOG IN screen after you enter your H#: The 4 viewer options in the middle and the SCHEDULE button on the log in screen provide different avenues for you to view your upcoming appts. Explore these after you are tutoring for additional information.
- Select **LOG OUT**. You should see your name & the time flash in the Upper Right corner. **You are DONE!**