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Connect

Report

Success

Record

**How to Determine the Different Levels of User Access**

**Overview**

With all the different type of users, you will need to determine the Group permissions and responsibilities of users within the Trac System. You will establish your own groups, as many as you like, and decide how they are named. The Group permissions will include what centers the user will have access to, what access they have to the schedule, what information can they see about students, will they have administrative access, can they make changes to visits or see another consultant’s visit note and more.

**Center Profile: Group Access Tab**

Allows you to manage/create new groups and assign what access they should have. When you click on the group name it will open the group detail preferences.

* **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, lists) are only accessible through the SysAdmin group.
* **User List Tab**
  + This is where you would create account for the administrator, coordinator, supervisor, front desk staff, or student worker.
* **KIOSK List Tab**
  + 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. The Kiosk Station does not have to be staffed or be actively overseen by a staff member since it is primarily used by Students. From a Kiosk a student may Log in for a Visit and 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.
  + Kiosks are created within the Group Access Preferences. Any User assigned to the same Group as a Kiosk can switch to Kiosk mode.
* **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.
* **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.
* **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.
* **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.
* **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, and you check a setting in the Restrictions tab to remove a privilege.