

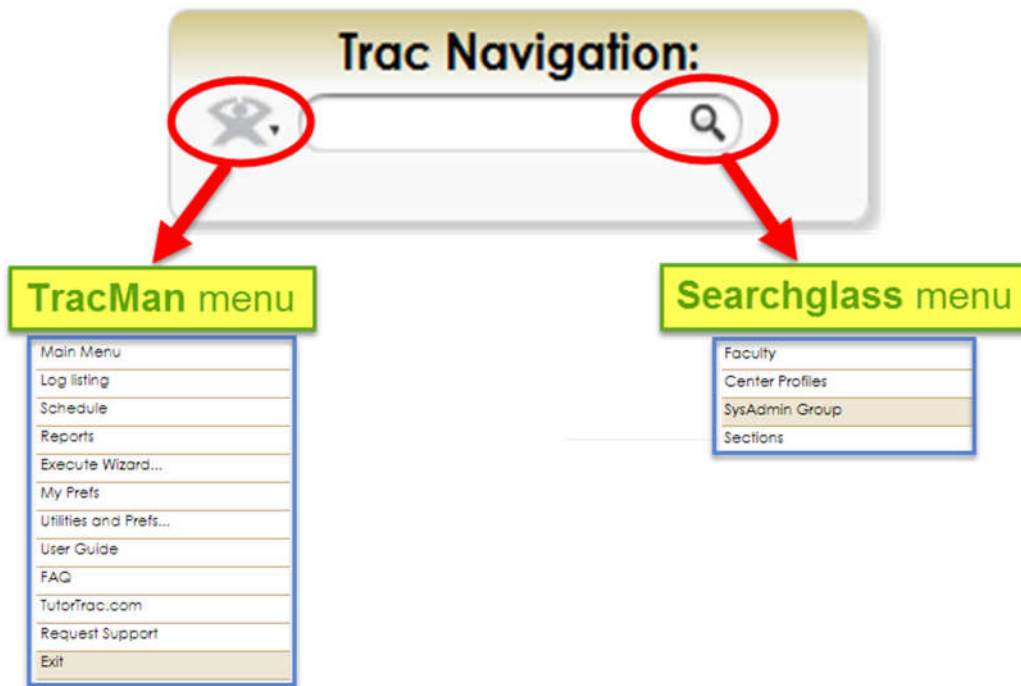


# Up and Running in 1 Hour:

Get Your Trac System Going From the Ground Up

- AdvisorTrac/TutorTrac is Installed.
- Current students and their enrolled courses are loaded. (And current term is set.)
- You are 1 hour away from recording your first student visit!

## Trac Navigation Menus





## Account Types

There are 4 different account types in AdvisorTrac/TutorTrac:

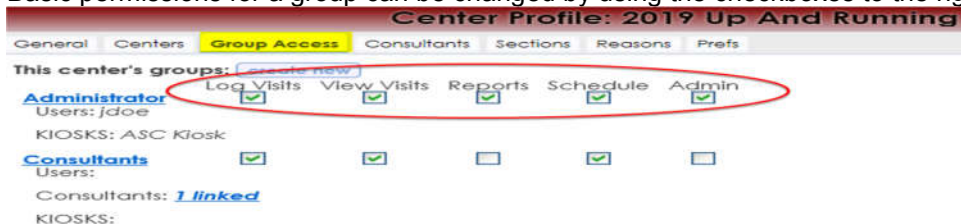
1. **Student Type**
  - Allows students to check in/out for visits.
  - Can allow students to book their own appointments.
2. **Faculty(Instructors) Type**
  - Allows instructors to view of their current courses and their enrolled students.
  - May also allow access to create a SAGE referral.
3. **Consultant Type**
  - This account type is for anyone that meets with a student or needs to be on the schedule.
4. **User Type**
  - The first three account types have their own inherited restrictions and privileges.
  - The USER account type allows more flexibility in assigning permissions and restrictions.
  - This account type allows to the most minimal permissions to be set all the way to the maximum privileges.
  - The SysAdmin account is a User type account and it should always have the highest privileges.
  - Never remove the SysAdmin account -- you will risk getting locked out of your database!

There are times that a person will need to have more than one account type (they can have all 4 account types - if needed). That can happen when you have students that also work as tutors (peer tutors). However, a person cannot have multiple accounts of the same type (like two student accounts). The system does not prevent this from happening, so you must be careful not to create duplicate accounts.

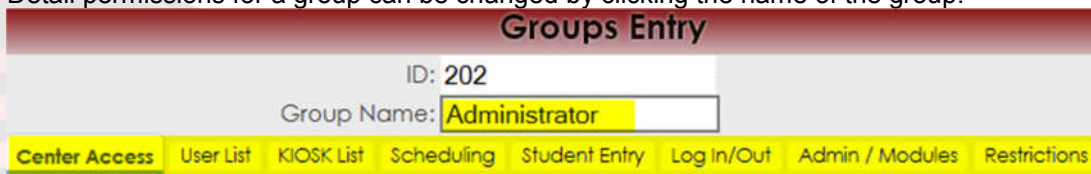
## Group Access

Trac Navigation > search glass icon > Center Profiles > (click profile name) > **Group Access** (tab)

1. All permissions are granted through groups.
2. Students already have their own group created.
3. Instructors already have their own group created.
4. A user/consultant account can only be assigned to one group.
5. Basic permissions for a group can be changed by using the checkboxes to the right of the group name.



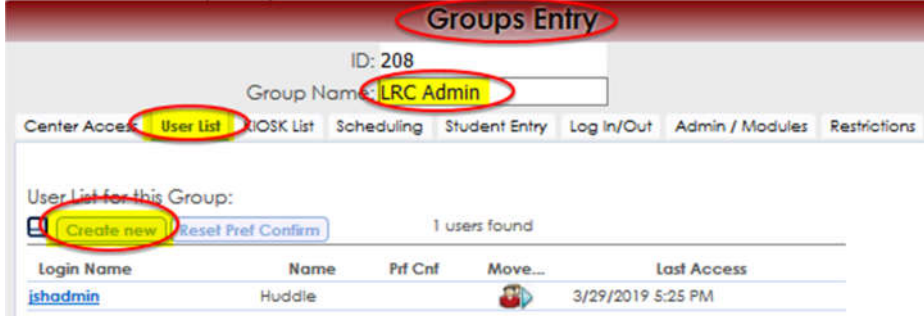
6. Detail permissions for a group can be changed by clicking the name of the group.



7. Create groups



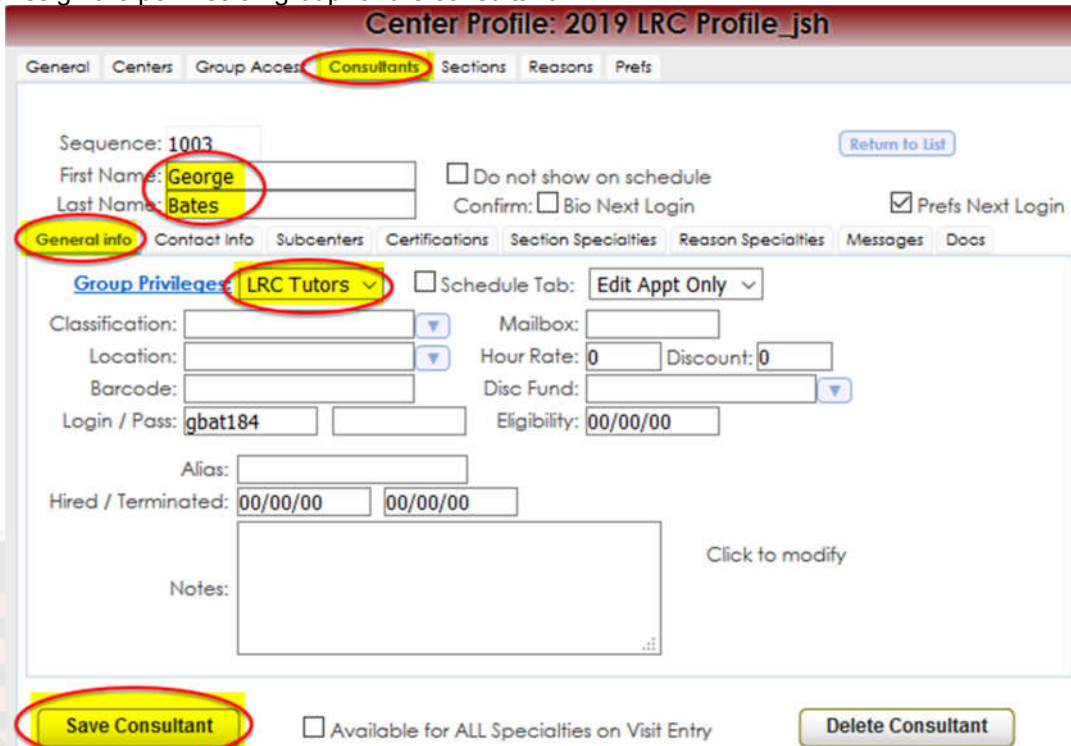
8. Create users for your groups.



9. Create consultants for your groups.



Assign the permission group for the consultant.



Assign the subcenter(s) the consultant will work in.

**Center Profile: 2019 LRC Profile\_jsh**

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

Sequence: 1003 [Return to List](#)

First Name: **George**  Do not show on schedule  
Last Name: **Bates** Confirm:  Bio Next Login  Prefs Next Login

General info Contact Info **Subcenters** Certifications Section Specialties Reason Specialties Messages Docs

Subcenters: **LRC-Learning Resources**

**Save Consultant**  Available for ALL Specialties on Visit Entry **Delete Consultant**

10. Create a kiosk for your Front Desk Staff group - used to check students in/out for their visit.

**Groups Entry**

ID: 203  
Group Name: **Front Desk Staff**

Center Access User List **KIOSK List** Scheduling Student Entry Log In/Out Admin / Modules Restrictions

KIOSK List for this Group:  
KIOSK Name: **LRC Kiosk**

Linked subcenter:  Show Students: **Smith, John**  Refresh after login/out  Log Resource

Linked Location:  Linked consultant:  Functionality: **In-Out**

Allow Student to leave (waiting nearby) and receive a text message when the center is ready to see the student  
 Is Dynamic KIOSK, Optional pass code:

**Dynamic KIOSK Options Setup:**

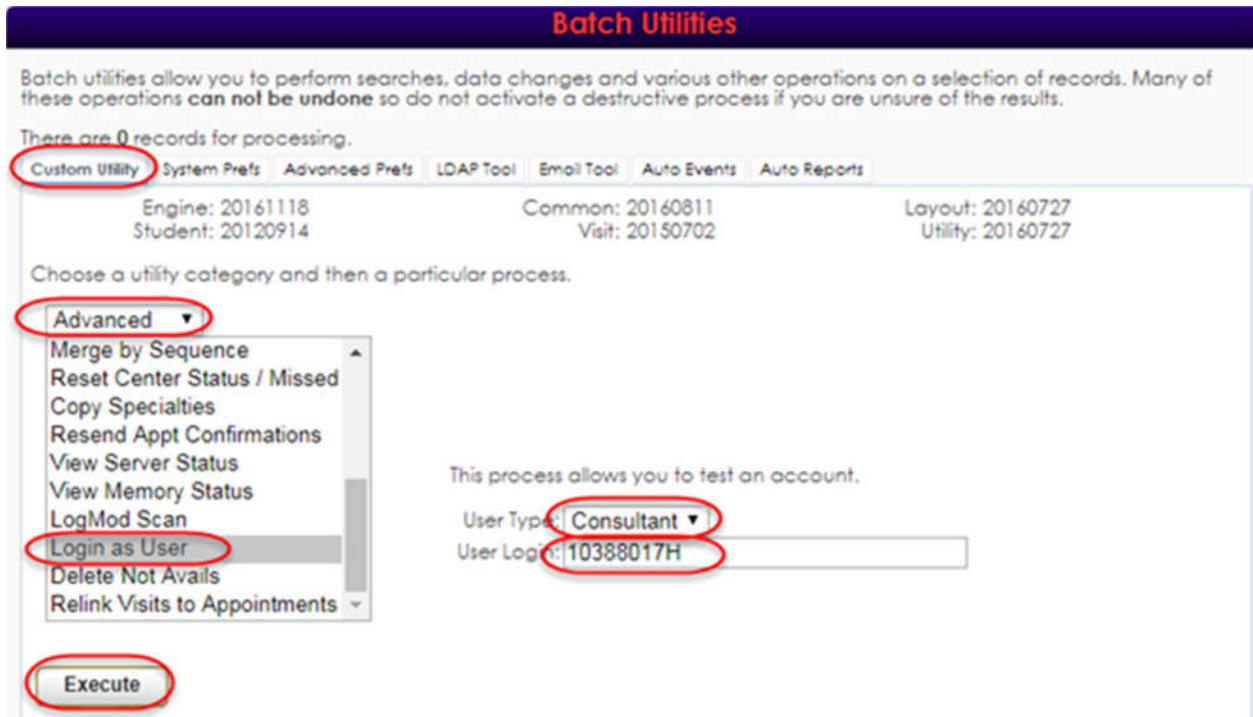
<input type="checkbox"/> Consultant	<input type="checkbox"/> Location	<input type="checkbox"/> Custom 3	<input type="checkbox"/> Custom 6
<input type="checkbox"/> Subject	<input type="checkbox"/> Custom 1	<input type="checkbox"/> Custom 4	<input type="checkbox"/> Custom 7
<input type="checkbox"/> Reason	<input type="checkbox"/> Custom 2	<input type="checkbox"/> Custom 5	<input type="checkbox"/> Custom 8

**Save KIOSK** **Delete KIOSK**

~~Save~~ **Back** No deletion allowed, 2 users associated with this group.

## 11. Verify Permissions

After setting up an account, you can use the 'Login as User' custom utility to test their view and capabilities in your Trac System (see screenshot). Goto:  
Trac Navigation > TracMan icon > Utilities and Prefs... > Custom Utility (tab) > Advanced (category) > Login as User > User Type: (select account type, like Student or Consultant) > User Login: (enter username/handle) > Execute

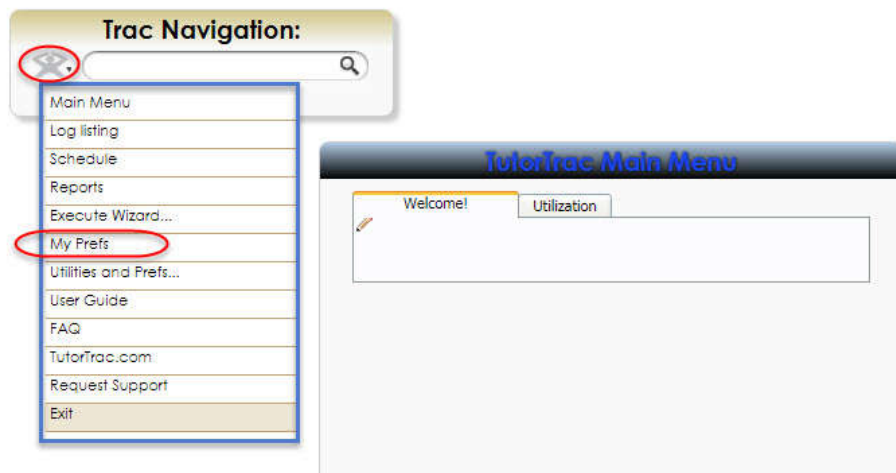


## 12. My Prefs

When a new consultant/user account is created, by default many of the options on the main page will not show up. For these accounts to see more options, they need to goto:

Trac Navigation > My Prefs > (select preference choices) > 'Save Prefs' button

Note: You may also choose to check-mark the 'Prefs Next Login' option as you are creating the new consultant's account. That way they will be prompted to set their preferences.



## **Visit Rules**

- Configure Visit Check In/Out Rules

Trac Navigation > search glass icon > Center Profiles > (click profile name) > Prefs (tab) > **Log In/Out** (tab)

## **Booking Rules**

- Configure Scheduling Rules

Trac Navigation > search glass icon > Center Profiles > (click profile name) > Prefs (tab) > **Scheduling** (tab)

- Create Available Time-slots

Trac Navigation > TracMan icon > Schedule > (click name of consultant) > (add a time slot)

## **Test**

### **Record Your First Student Visit**

1. Open kiosk by logging in as 'LRCKioskuser'
2. Enter student ID in the 'Log Student:' window.
3. Enter visit notes.
4. Check student out.
5. Done!

## **Redrock Support**

Remember, (with a current maintenance agreement) you have our support through all of this!

Don't hesitate to give us a call at:

877-303-7575 or 480-752-8533

or schedule time with us at:

<https://www.go-redrock.com/training/>