Get the Most Out of Your Center Profile Preferences

Overview

When setting up the Trac System, the Center Profile is one of the first areas in which users will setup and configure their system. Subcenters are created to separate services. The preferences will determine the basic operation of your centers in the Trac System and how students and users operate within the system.

- o **General Tab**
    - 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.
        - Always make sure the "Primary Group:" is your system administrator account. This is a safety net so your administrative access does not get removed.
- o **Centers Tab**
    - 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.

- o **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.
    - **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.

- **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.

- **Prefs Tab: Log In/Out**
  - The Log In/Out preferences deal with logging students in and out such as what is displayed on the log in/out screens and terminating visits.

- **Prefs Tab: Scheduling**
  - The scheduling preference allows you to set your appointments rules like how far out can the students see the schedule, how many appointments can a student book or even miss.

- **Prefs Tab: Custom Fields**
  - Custom Fields can be used to receive input from the students like "How did you hear about the Tutoring Center?" or "Is this a drop-in visit?" You can have up to 8 custom fields.

- **Prefs Tab: Notices**
  - Allows you to enter a specific welcome message to your students, staff, or kiosk.