



Unleash Your Trac Potential with Sections and Reasons!

Section/Consultant/Reason

Trac System Profile settings control if consultant, section and/or reason are displayed as options for visit categories.

Note: This is at the Center Profile level, not the subcenter level.

Important Note: Once sections/reasons are used on visit records, never delete the section/reason. Deleting a used section/reason will make the visit data invalid. If a section/reason is no longer needed, deactivate it – never delete it.

Create Sections (subjects/classes/courses)

Import Sections

IT dept creates a daily file to keep Trac System updated with student's current course enrollments (registrations).

Manually Create Sections

You can add sections that are not part of your automatically imported registrations.

Examples: Workshop, Work Visit, Advising, Orientation, Prospective Student, Other

(Tip: use Term 0 for manually created sections. It is much easier to find them later!)

Goto: Trac Navigation > search glass icon > Center Profiles > (click profile name) > Sections tab > new... button > set 'Sect Term:' to the name of your new section > set 'Term ID' to 0 > check-mark 'Non Enrolled (Available to All)' > Save button.

Section Options

Subj Code: an alpha-numeric code that identifies the subject of the course being taught (e.g. MATH101).

Section: alpha-numeric code for the individual class (one subj code may have multiple section codes).

Term ID: numeric code that identifies the semester. Use Term 0 for manually created sections.

Sect Term: the unique identifier for your section. The format is [SubjCode][Section][TermID]

- o For example: **MATH101 03 201803**

Non Enrolled (Available to All)

Displays as a choice for students - even when they are not marked as enrolled in this specific section.

is Work Section (Available to Consultants Only)

- o Only consultants see this section – when this option is check-marked.
- o Does not show for scheduling.
- o Use Term 0
- o Use this option to document work/payroll visit information.
- o Note: consultants will need a linked student record to allow them to use work visits.

Do Not Display on Search Availability

Excludes the section as a choice when students are attempting to book appointments.

Work Sections

Use 'work' as the 'Sect Term', Term = 0, and check-mark 'is Work Section (Available to Consultants Only)'.

Enroll Students Manually - Goto: Trac Navigation > search glass icon > Center Profiles > (click profile name) > Sections tab > (search for section) > (click section) > Enrollment tab > (search for student) > check-mark box next to student's name.

Activate Sections

- 1) Open center profile Sections tab – goto: *Trac Navigation > search glass icon > Center Profiles > (click profile name) > Sections tab*
- 2) Verify sections for your current term number are showing. If not, the 'CurrentTerm' needs to be set in the Batch Utilities, System Prefs.
- 3) Globally activate (far left checkboxes) sections for the current Term – goto: *'Subcenter Options' > 'Activate these...'*
- 4) Select the subcenter – goto: *'Subcenter Options' > click your subcenter name*
- 3) Verify your chosen subcenter appears above 'Subcenter Options'.
- 4) Search for specific sections to activate for this subcenter. (Math centers may only allow students currently enrolled in math or science courses.) Choose all Math course by using the @ symbol as a wildcard. In the search box, type 'MAT@', hit enter key.
- 5) Verify only the sections you want to add to the center are showing.
- 6) Add the sections to the subcenter – goto: *'Subcenter Options' > click 'Add these to (your subcenter name)...'*
- 6) Repeat step 4 – 6 until all desired sections are added to the subcenter

Activating ALL COURSES for a Subcenter

Goto: Trac Navigation > search glass icon > Center Profiles > (click profile name) > Sections tab > List Options > **Subcenter Activation...**

Drop/Add Cut-off Date

Prior to the drop/add cut-off date for student registrations at your school, it is possible that new courses (sections) are added that will need to be activated. Students that enrolled in courses recently may be missing their sections. Until the official drop/add cut-off date passes, you may need to repeat 3 steps daily (...and one last time after the cut-off date).

1. Activate Sections at the **Global** level
2. Activate Sections at the **Subcenter** level
3. Consultant **Specialties** may need new sections added

Students Missing Courses

If students are not seeing their enrolled courses as subject choices upon visit check-in, one or more problems may exist.

- A. The import file is missing the student's registration info.
- B. The registration is not activated for the student.
- C. Their section is not activated. Sections must be added to two levels of activation:
 - 1) Global Level
 - 2) Subcenter Level

Reasons

Create Reasons: Goto Trac Navigation > search glass icon > Center Profiles > (click profile name) > Reasons tab > create new button > add your Reason > Save. Examples: General Tutoring, Advising, Computer Use, Workshop, Orientation, Peer Group, Writing Help.

Is Work Reason __ (Consultants Only)

- o Allows a consultant to record their work time. This is for payroll or timesheets.
- o When creating the work reason, check-mark the 'is Work Reason: (Consultants Only)' option.

Is Staff Reason __ Quick Visits & Log-Ins by Staff

Only 'user' and 'consultant' level accounts can use this reason – not students or instructors.

Do NOT SHOW for Appointments – reason will not show as an option when a student is booking an appointment.

Do NOT SHOW for Login/Out Process – reason will not show as an option when a student is checking in or out for their visit.

Do NOT SHOW for KIOSKS – reason will not show as an option for any kiosks.

Auto logout after: __minutes

- o This option is especially useful for SI visits, Workshops & Orientations -- where students check-in for their visit, but might not check-out.
- o Set a maximum number of minutes allowed for the visit.
- o Check-mark 'do not wait full time.' If you would like the student to be logged out immediately. The visit would be saved with the amount of time designated in 'Auto logout after:' field.

Notify when student still logged in after __ minutes:

- o A warning notice displays on the log listing when a student's allotted amount of time is over. Useful for Testing Centers.

Activate Reasons

Goto Trac Navigation > search glass icon > Center Profiles > (click profile name) > Reasons tab > Subcenter Options > (click subcenter name) > add reasons to the subcenter one-by-one, by check-marking the boxes under 'Subcenter Options'.

Consultant Specialties

- o When a student is booking an appointment, we want to match them up with a qualified consultant that can help them. We accomplish this with consultant specialties.
- o Details of using consultant specialties in scheduling appointments are covered in scheduling documentation.
- o Open a consultant's profile, then activate each section/reason they are qualified for.
 - 1) Note: Sections and reasons must be activated (globally) before they show up as options for consultant specialties.
 - 2) Add Section Specialties manually to your consultants – goto: Trac Navigation > search glass icon > Center Profiles > (click profile name) > Consultants tab > (click consultant's name) > Section Specialties tab > use the search box to help select desired sections > ('find sel', 'select' and 'deselect' buttons can be used to help check/uncheck desired sections) > Save Consultant button.
 - 3) Add Reason Specialties one-by-one consultants --- goto: Trac Navigation > search glass icon > Center Profiles > (click profile name) > Consultants tab > (click consultant's name) > Reason Specialties tab > use the search box to help select desired sections > check-mark desired reasons > Save Consultant button.
 - 4) To copy consultant specialties from previous term to the new term – goto: Trac Navigation > TracMan icon > Utilities and Prefs... > Custom Utility tab > Standard > Copy Specialties > fill in 'From Term:' and 'To Term:' boxes > Execute button.
*Section specialties can be copied to for a new term code (as long as the term code is the only value that changes in the section's 'Sect Term:' field).
- o Past Sections – at times, you may need to keep old specialties activated (if you are not finished entering/editing quick or batch visits). Most times, you don't need to see past sections as options for consultant specialties. You can globally deactivate sections from previous semesters (using term codes to select the sections).
- o Available for ALL Specialties on Visit Entry – this option is used only for quick/batch visits (not for schedule section/reason specialties).