## Decisions to Make Before Setting Up SARS-TRAK

<table>
<thead>
<tr>
<th>SETTINGS REQUIRING YOUR DECISION</th>
<th>YOUR ACTION ITEM</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ID FORMATS</strong></td>
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<tr>
<td>Each Application may select the default student ID format to be used with SARS-TRAK. If the ID format already exists in SARS-GRID, simply select it as the default. Otherwise, add the ID format to be used.</td>
<td>List the default ID format to be selected.</td>
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<tr>
<td><strong>LOCATION CODES</strong></td>
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<tr>
<td>Determine whether locations that do not use SARS-GRID will be using SARS-TRAK. For each such location, create a Location Code.</td>
<td>Select the Location Code(s) that will be used for each location.</td>
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<tr>
<td><strong>REASON CODES</strong></td>
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<tr>
<td>Reason Codes are used to describe the stated purpose for a student’s use of a service. They are used for drop-in visits, scheduled appointments, and other types of visits. If SARS-TRAK is linked to SARS-GRID, the existing Reason Codes will be displayed and available for selection. Otherwise, new reason codes must be added.</td>
<td>When using classes, this section is non-applicable.</td>
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<tr>
<td><strong>LANGUAGES</strong></td>
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<tr>
<td>SARS-TRAK Check-In screens display option buttons and messages to prompt students through the self-serve process. The wording of the button labels, column labels, and messages may be crafted in various languages.</td>
<td>Will you be using any languages other than English? Yes No</td>
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<tr>
<td><strong>CREATE APPLICATIONS USING SARS-TRAK</strong></td>
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<tr>
<td>An Application refers to any grouping that will be sharing a set of buttons and options to be used by students.</td>
<td>Create the name(s) of the applications that will be using SARS-TRAK.</td>
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<tr>
<td>SETTINGS REQUIRING YOUR DECISION</td>
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<td>----------------------------------</td>
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</tr>
<tr>
<td><strong>APPOINTMENTS BUTTON</strong></td>
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</table>
| An option exists to allow students to make appointments using SARS-TRAK. | Do you want to use the Appointments option?  
☑ Yes  ☐ No |
| Students may be allowed to make only same day appointments, or they may be allowed to make appointments for any date in the current data view. | Select one:  
☐ Students will be able to make future appointments (any day in Current Data View).  
☐ Students will be able to make same day appointments only. |
| An option exists to allow students to select from an advisor group when making an appointment (e.g., Spanish-speakers). | Select one:  
☐ Students will be allowed to select from an advisor group.  
☐ Students will be allowed only to select from all available advisors. |
| A “Hide Appt Criteria” option is available to provide students the broadest possible options when making an appointment. | Do you want to limit a student’s options when looking for an appointment?  
☑ Yes  ☐ No  
If no, you will select Hide Appt Criteria. |
| An option exists to allow students to print a reminder after making the appointment. | Students will be allowed to print a reminder after making an appointment.  
☐ Yes  ☐ No |
| Schedule Codes that will be made available to students must be selected, as well as a default schedule code. | Pick the Schedule Codes to be used. |
| Reasons for appointments must be selected. | Pick the default Schedule Code. |
| A default Reason is required. | Pick all of the Reasons that students may select when making their appointments. |
| A default Reason can be ignored. | Pick a default Reason that will be selected automatically if students do not select one. |
| An option exists to force students to enter a reason when making an appointment. | Ignore default Reason?  
☑ Yes  ☐ No |
| An option exists to permit students to select more than one reason for the drop-in visit. | At least one reason will be required.  
☑ Yes  ☐ No |
| An option exists to display messages associated with a selected reason. | Students may select multiple reasons.  
☑ Yes  ☐ No |
| An option exists to gain access to the screen used for creating button labels and associated messages. | Do you want to use the Allow Reason Messages option?  
☑ Yes  ☐ No |
|                                 | What do you want this button label to say?  
What message will be displayed after the button is selected? |
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<th>SETTINGS REQUIRING YOUR DECISION</th>
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<tr>
<td><strong>APPOINTMENTS BUTTON (continued)</strong></td>
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</table>
| An option exists to use Classes instead of Reasons. If classes are used, data will be imported from another data source into the SARS database. IT personnel should contact SARS Software Products, Inc. to discuss the needed data format. | Do you want to use Classes for appointments?  
☐ Yes  ☐ No |
| An option exists to display the class section on the Button. | Do you want to show the Section on the Button?  
☐ Yes  ☐ No |
| You may edit sections on the Course Lab Configuration screen. | The Term for which these lab configurations will apply: __________ |
| | The section(s) to be displayed when a student uses the check-in screen: |
| | The first date on which a student may check in for this class: __________ |
| | The last date on which a student may check in for this class: __________ |
| | In Duration field, enter the default length of a visit made for each course selected if the student fails to check out: __________ |
| | In the Cutoff field. Enter the maximum duration of a visit for each course selected: __________ |
| You may specify information about required courses on the Required Courses screen. | This course is required for this Location.  
☐ Yes  ☐ No |
| A Program Filters screen is available to specify which students may use the Check-in/out feature for the selected Application. | If using this option, indicate what the filter should say: ____________________________ |
| **DROP-IN BUTTON** | |
| An option exists to allow students to check in for a drop-in visit. | Do you want to use the Drop-In Button option?  
☐ Yes  ☐ No |
<p>| | If so, pick the Reasons or Classes that students may select from when using this button. |</p>
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<tbody>
<tr>
<td>DROP-IN BUTTON (continued)</td>
<td></td>
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<tr>
<td>A default Reason is required.</td>
<td>Pick a default Reason that will be selected automatically if the student does not select one.</td>
</tr>
<tr>
<td>A default Reason can be ignored.</td>
<td>Ignore the default Reason? □ Yes □ No</td>
</tr>
<tr>
<td>An option exists to force students to enter a reason for their drop-in visit.</td>
<td>Will at least one reason be required? □ Yes □ No</td>
</tr>
<tr>
<td>An option exists to permit students to select more than one reason for the drop-in visit.</td>
<td>Will students be allowed to select multiple reasons? □ Yes □ No</td>
</tr>
<tr>
<td>An option exists to display messages associated with a selected reason.</td>
<td>Do you want to use the Allow Reason Messages option? □ Yes □ No</td>
</tr>
<tr>
<td>An option exists to specify the maximum number of times per day that a student may check in to one location for a single course.</td>
<td>Do you want to limit the number of check-ins per day? □ Yes □ No If Yes, what is the maximum? _____</td>
</tr>
<tr>
<td>An option exists to gain access to the screen used for creating button labels and associated messages.</td>
<td>What do you want this button label to say?</td>
</tr>
<tr>
<td>An option exists to use Classes instead of Reasons. If classes are used, data will be imported from another data source into the SARS database. IT personnel should contact SARS Software Products, Inc. to discuss the needed data format.</td>
<td>Do you want to use Classes? □ Yes □ No</td>
</tr>
<tr>
<td>An option exists to display the class section on the Button.</td>
<td>Do you want to show the section number of the class on the Button? □ Yes □ No</td>
</tr>
<tr>
<td>You may edit sections on the Course Lab Configuration screen.</td>
<td>The section(s) to be displayed when a student uses the check-in screen: ____________</td>
</tr>
<tr>
<td></td>
<td>The first date on which a student may check in for this class: ____________</td>
</tr>
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</table>
### SETTINGS REQUIRING YOUR DECISION

#### DROP-IN BUTTON (continued)

- You may specify information about required courses on the Required Courses screen.
- A Program Filters screen is available to specify which students may use the Check-in/out feature for the selected Application.

#### CHECK-IN/CHECK-OUT BUTTON

- An option exists to allow students to use SARS-TRAK to check in and out of a student service, such as a lab. Checking in and out will track the amount of time that has elapsed between check in and check out.
- A default Reason is required.
- A default Reason can be ignored.
- An option exists to force students to enter a reason when making an appointment.
- An option exists to permit students to select more than one reason for the drop-in visit.
- An option exists to display messages associated with a selected reason.
- An option exists to specify the maximum number of times per day that a student may check in to one location for a single course.

### YOUR ACTION ITEM

- The last date on which a student may check in for this class: ________
- In Duration field, enter the default length of a visit made for each course selected if the student fails to check out: __________
- In the Cutoff field. Enter the maximum duration of a visit for the each course selected: __________
- This course is required for this Location. □ Yes □ No
- If using this option, indicate what the filter should say: ________________________________
- Do you wish to use this option? □ Yes □ No
- Pick a default Reason that will be selected automatically if the student does not select one. Select a default Reason: __________
- Ignore the default Reason? □ Yes □ No
- Students will be required to select at least one reason. □ Yes □ No
- Students will be allowed to select multiple reasons. □ Yes □ No
- Display Reason Messages? □ Yes □ No
- Limit the number of check-ins per day? □ Yes □ No
- If Yes, what is the maximum? _____
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<tr>
<td>CHECK-IN/CHECK-OUT BUTTON (continued)</td>
<td>Set a time minimum? □ Yes □ No</td>
</tr>
<tr>
<td>An option exists to specify the minimum amount of time per session that must be spent in a location.</td>
<td>If Yes, what is the minimum (in minutes)? ____</td>
</tr>
<tr>
<td>An option exists to gain access to the screen used for creating button labels and associated messages.</td>
<td>What do you want this button label to say?</td>
</tr>
<tr>
<td>An option exists to use Classes instead of Reasons. If classes are used, data will be imported from another data source into the SARS database. IT personnel should contact SARS Software Products, Inc. to discuss the needed data format.</td>
<td>What message will be displayed after the button is selected?</td>
</tr>
<tr>
<td>An option exists to display the class section on the Button.</td>
<td>Do you want to use Classes? □ Yes □ No</td>
</tr>
<tr>
<td>You may edit sections on the Course Lab Configuration screen.</td>
<td>Do you want to show the Section on the Button? □ Yes □ No</td>
</tr>
<tr>
<td></td>
<td>The Term for which these lab configurations will apply: ________________</td>
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<tr>
<td></td>
<td>The section(s) to be displayed when a student uses the check-in screen:</td>
</tr>
<tr>
<td></td>
<td>The first date on which a student may check in for this class:__________</td>
</tr>
<tr>
<td></td>
<td>The last date on which a student may check in for this class: _________</td>
</tr>
<tr>
<td></td>
<td>In Duration field, enter the default length of a visit made for each course selected if the student fails to check out: _________</td>
</tr>
<tr>
<td></td>
<td>In the Cutoff field. Enter the maximum duration of a visit for the each course selected: ________________</td>
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<tr>
<td>SETTINGS REQUIRING YOUR DECISION</td>
<td>YOUR ACTION ITEM</td>
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<tr>
<td>CHECK-IN/CHECK-OUT BUTTON (continued)</td>
<td></td>
</tr>
<tr>
<td>You may specify information about required courses on the Required Courses screen.</td>
<td>This course is required for this Location. □ Yes □ No</td>
</tr>
<tr>
<td>A Program Filters screen is available to specify which students may use the Check-in/out feature for the selected Application.</td>
<td>If using this option, indicate what the filter should say:_____________________________</td>
</tr>
<tr>
<td>MESSAGE ONLY BUTTON</td>
<td></td>
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<tr>
<td>An option exists to simply display a message on a button.</td>
<td>Do you wish to use this option? □ Yes □ No □ Not at this time (can add later) If so, what do you want the message to say?</td>
</tr>
<tr>
<td>OPTIONAL SETTINGS</td>
<td></td>
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<tr>
<td>Various options may be selected on the Databases screen.</td>
<td>Which of these options do you want to select? □ Use ODBC □ Enable appointment lookup □ Enable counselor notification □ Keep database open □ Allow ID Toggle □ General Guest IDs Specify Valid ID Formats:__________________ Specify Default ID Format:__________________ □ Use Appt. Checkin Cutoff Specify Minutes Before checkin:________ Specify Minutes After checkin:________ Do you want to set up the Certified Times options so that the hours worked by a certified individual may be entered? □ Yes □ No</td>
</tr>
<tr>
<td>SETTINGS REQUIRING YOUR DECISION</td>
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<tr>
<td><strong>BANNER MESSAGES</strong></td>
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<tr>
<td>An option exists to display a static or moving banner message on the Check-In Screen.</td>
<td>Do you want to use this option? □ Yes □ No □ Not at this time (can use later). If so, what do you want the message to say? Select the movement and color settings. Style: _____________ Direction: _____________ Delay: ___________ Movement Amount 1-10: _________</td>
</tr>
<tr>
<td><strong>MISCELLANEOUS OPTIONS</strong></td>
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<tr>
<td>Various options may be selected from the Banner &amp; Misc. screen.</td>
<td>The length of time in seconds during which the default messages will be displayed on the screen: ___________ The accuracy range to be offered to students when they are instructed to enter the actual amount of time spent on an activity: ___________ □ Sign-up Required to Continue □ Sign-up Requests apply to zero Lab Hours □ Hide Lab Totals Option □ KeyPad Always On □ Allow Extra Hours Multiplier: _______ □ Working with SARS-GRID □ Run as Full Screen □ Allow New Student Entry □ Show Students Waiting</td>
</tr>
<tr>
<td>SETTINGS REQUIRING YOUR DECISION</td>
<td>YOUR ACTION ITEM</td>
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<td>----------------------------------</td>
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<tr>
<td>CREATE MESSAGES AND LABELS</td>
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<tr>
<td>Each message and label needs to have corresponding language. Defaults are shipped with the product but may be re-configured as desired.</td>
<td>Will you be creating your own messages and labels?  □ Yes  □ No  If so, decide on the wording to be used.  Will you be creating corresponding messages and labels in languages other than English? □ Yes □ No  If so, decide on the wording to be used on the other language(s).</td>
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<tr>
<td>ACCESS CODES – SECURITY RIGHTS</td>
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<tr>
<td>Access rights will control the extent to which users will have access to the SARS-TRAK system.</td>
<td>What Access Codes will be used?  What access rights will each Access Code be assigned?  Add new Access Codes as necessary.</td>
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<tr>
<td>USER MAINTENANCE</td>
<td></td>
</tr>
<tr>
<td>Users of SARS-TRAK must be assigned an Access Code and a Primary Location. Users may also be assigned to additional Locations.</td>
<td>Add new users, assign them appropriate Access Codes and Primary Locations, and assign them to all necessary Locations.</td>
</tr>
</tbody>
</table>