Setting-up SARS TRAK

Target Audience: This document is for Lab supervisor who will set up a SARS TRAK application for the first time, or is modifying an existing SARS TRAK application.

Objective: After completing this setup process, you should expect the student login terminal (Kiosk) to reflect the changes you made.   Local application maintenance described in this document are typically performed be a knowledgeable lab supervisor.   You will not affect the SARS system setup, only the application behavior pertaining to your lab.

Prerequisite: see SARS User Login Instructions which can be found on the SARS project page on the district web-site under the Technology tab.

Overview
1. SARS TRAK is constructed using two elements:
   a. Location – used to define a department where the application is running.
      i. Reason Codes are defined and attached to a location code.
      ii. Users are also associated with a location or several locations.
      iii. Users are assigned an Access Method that determines what they allowed to do in the system.
      iv. All users are set up by ETS.
   b. Application – used to define the student check-in/check-out process.
      i. Reason codes are pulled from the attached location.
      ii. Buttons are defined within an application.
      iii. Buttons can be tied to the reason codes and/or the classes a student is enrolled in.
2. Each user is set up by ETS with an Access Method which determines what they are allowed to do using TRAKAdmin.

Planning
Before you start setting up your applications, place a call to the Call Center and provide the following information for to be routed by the Call Center to Joe Lampo:
1. The name of the person who will be responsible for the application.
2. Locations, Foothill or De Anza.
3. What your location is called. For example BIOLAB could be the location name for the Biology lab.

ETS will create your location and provide the application owner with their login id and password. Currently it is does not match your CWID and MyPortal password.

It is a good idea to use the Set-up Check List that is accessible from the SARS project page. On page one, you only need to provide the Location, Reason, Languages and a name for the application. If SARS TRAK is only being used to check students in and out, go page 5 and complete the list of questions pertaining to Check-In/Check-out Button. Answer the questions on page 7 and 8.

Creating the Application
1. Using the SARS User Administration instructions, log into the yosemite server via Remote Terminal.
2. Select and open the District Software folder.
3. Open either the SARS De Anza or SARS Foothill folder.
4. Double click the Trak Admin icon **TRAKAdmn** to open the administration tool. The admin tool bar displays. It consists of four buttons each with a list of options:

a. Administration
   i. Application Maintenance – used to add or edit an application.
   ii. ID Format Maintenance – do not use. SARS is configured to work with our Banner eight-digit campus-wide ID numbers.
   iii. Language Maintenance – currently TRAK is set up to use English.
   iv. Location Code Maintenance – used to add or edit reason codes for the location. Locations are initially set up by ETS in GRID. This was done to allow applications to be tied to SARS GRID in the future with a minimum of work.
   v. User Name Maintenance – this will be grayed out and only available to ETS.
b. Manual Entry
   i. Manual Entry – used to enter student data in the event the network is down and the students are manually checking in and out.
   ii. Student Maintenance – use only if someone who is not a registered student needs to be able to check in and out of the system.
   iii. Students Currently Checked-in – how the lab supervisor and view which students are currently using the lab.
c. Reports
   i. A long list of reports that can be run. Reports are covered in detail in the Reports section of this document.
   ii. About – displays the release of software installed and being used.
5. Before you create your application, you can build your reason codes using the Location Code Maintenance Option under Application Management:
   a. Click your Location Code. Based on your security setting you will mostly only see your location.
   b. Once it displays in the Location Code box at the bottom of the box, click the Reasons button.
   c. To add a new Reason, click the Add button and then type in
      i. Reason Code – a short all caps code
      ii. Reason Description which will appear on a button for the student to select.
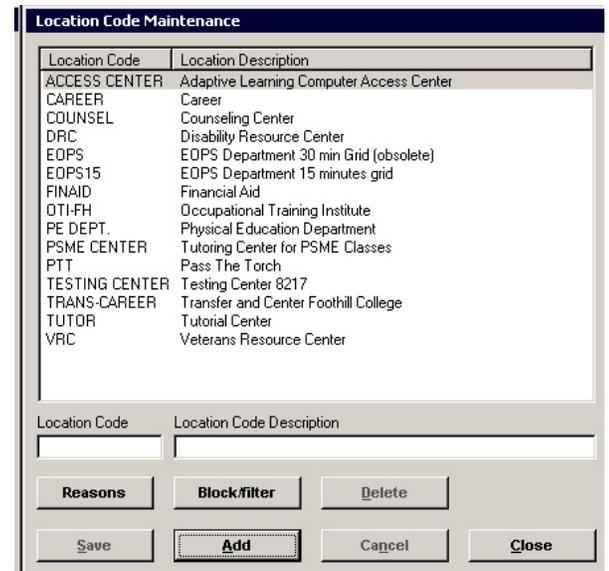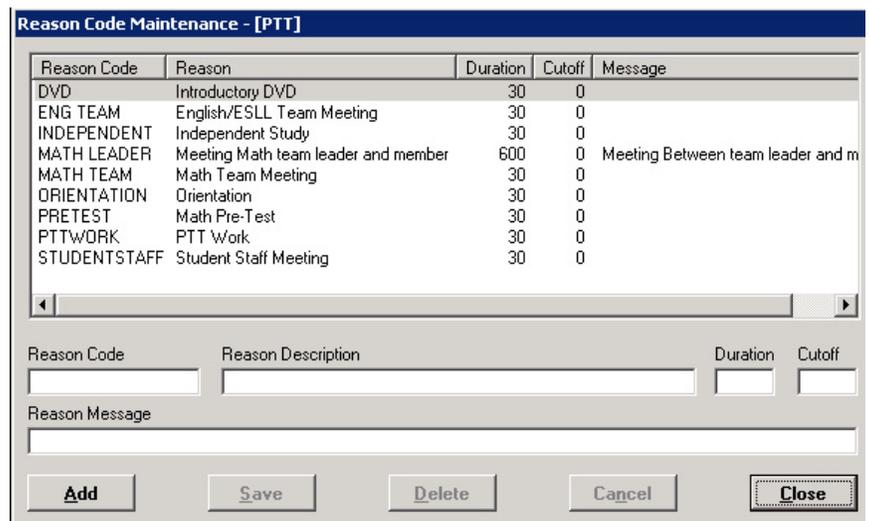
iii. Duration is the default duration for a visit if this reason is selected and the students does not check out or if the students are only required to check in.

iv. Cutoff is the maximum duration for a visit if this reason is selected. A value of zero, indicates that there is no cutoff.

v. Reason Message is a more detailed message that will display on the screen if this reason is selected.

vi. Click the Save button to save the reason.

d. To edit or delete a reason the list, click it and then use the appropriate button.

6. To create your application, select Application Maintenance and this screen will display:

a. To work with an existing application, click on the title and it will appear in the application box at the bottom of the screen. Then click on the Properties button.

b. To add a new application, click the Add button and then enter the short application name, its description and select the language. Then click the Save button. Now click the Properties button to move to the screen which will allow you to set up the buttons.

7. The properties window consists of four tabs, the Buttons tab is displayed below:
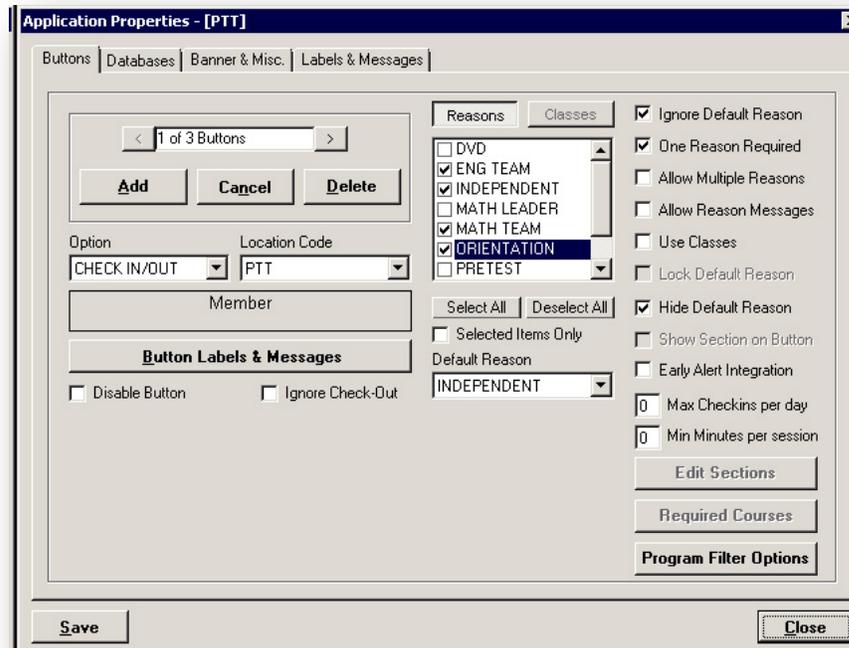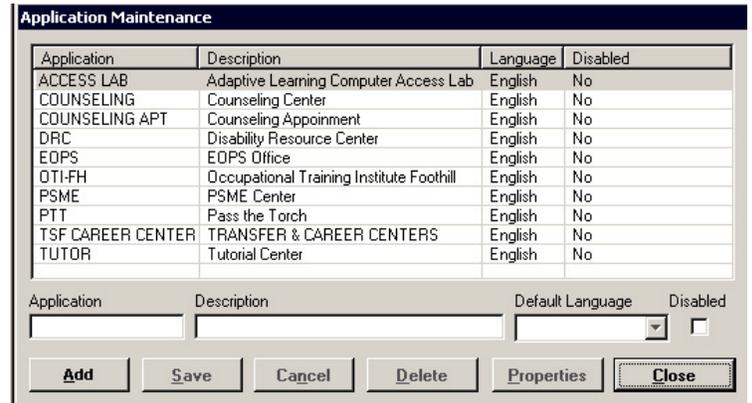
a. Each application can be set up with one to X number of buttons. Click Add to add a button.

b. Select an Option (Message Only, Drop-In Visit, Appointments or Check-in/Out). In this example we are using Check-in/Out.

c. Select your Location Code. This is where the Reason Codes are stored.
d. If you have more than one button, you can label the buttons with the Button Labels & Messages button.
e. Clicking the Reasons button will display your list of reasons. Check the ones that are associated with this button. You must select a Default reason, but you can hide it and/or ignore it.
f. If you check the Use Classes box on the left, the Classes button will become active. You can then view a list of the classes. When a student clicks on this button, he/she will then see buttons with the classes from the selected list that he/she is enrolled in. You can also create buttons that are not tied to classes. If you select classes, you must click on the Edit Sections button and <u>check</u> each section that is being used. Also verify that the term select is Active.
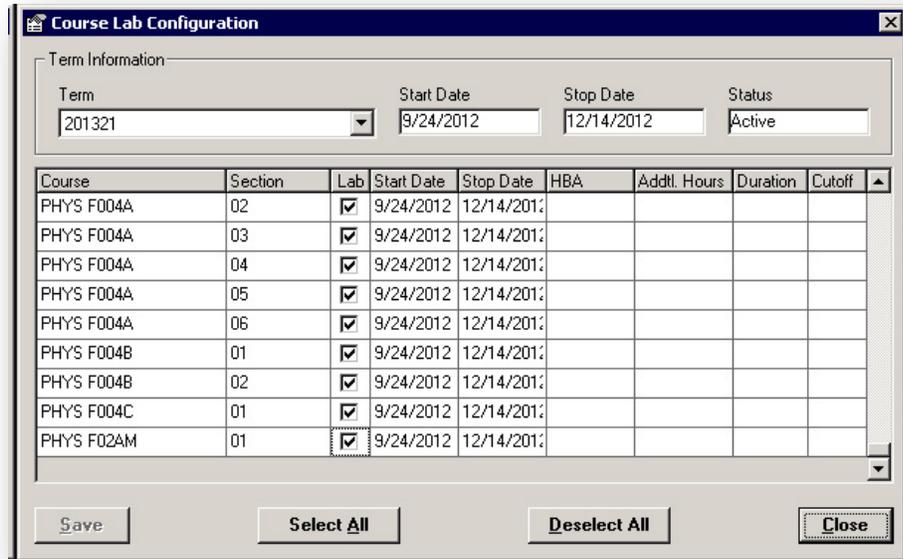
g. Whenever you make a change, remember to click the Save button.

8. Filters are a mechanism that allows you to restrict who can use a button. For the SARS Trak applications, ETS has worked with SARS to set a flag in the student's record which is validated when the student selects the filtered button. If the flag is not set the student will receive an error message that they cannot use that option. You can also set filters tied to the application and location.

9. Databases tab is used to specify the format to be used for student IDs and when a certified person is in the lab. Be sure to check the Keep Database Open box for better performance. The Check-in Cutoff is only used if you are using SARS GRID to make appointments.
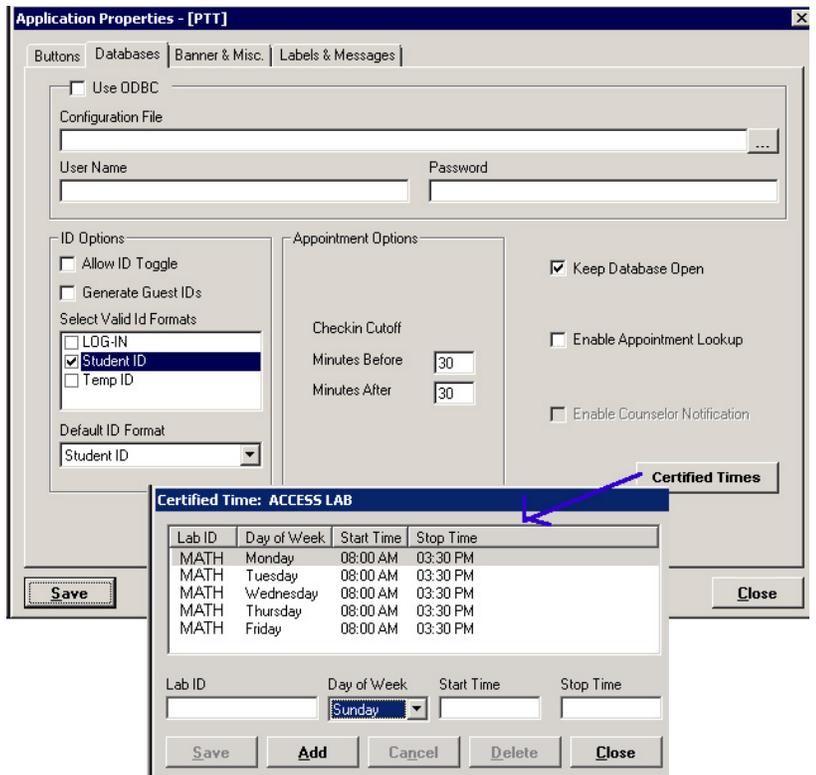
10. The third tab, Banner &
    Misc., is used to
    create a Banner that
    will scroll across the
    top of the screen.
    It is important to
    check the Run as Full
    Screen box. Blocking
    Options is used to
    establish global
    filtering criteria that
    will be used to allow,
    prevent or limit
    certain students from
    using SARS TRAK.
    There is also an
    override filter that
    can be defined for the
    location.
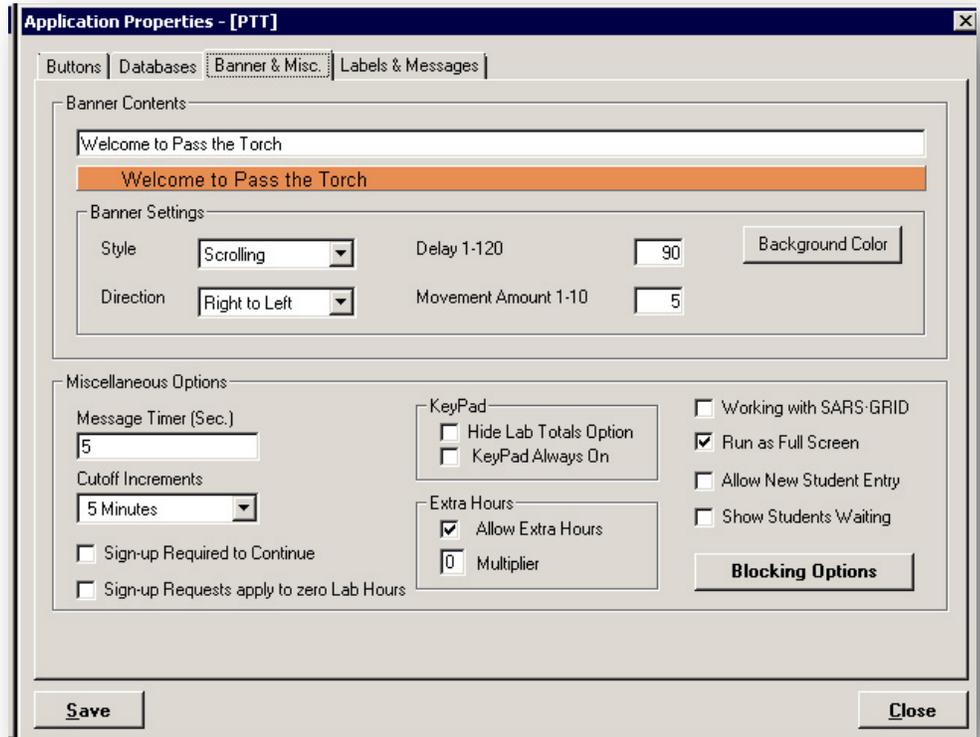
11. The fourth tab, Labels & Messages, allows the user to control all of the on-screen labels and messages.