



Getting Started Guide

KeepnTrack v2.7



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KeepnTrack Getting Started Guide
Printed October 25, 2011—v2.7
Printed in the United States of America by

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Getting Started Guide



- N O T E -

If this is your first time logging into the KeepnTrack system, you should find your **Login** codes and credentials included with your license registration letter. If you are experiencing difficulty logging in, please contact COMPanion's Technical Support team at 1-800-320-5830.

Before we begin, it is noteworthy to mention that KeepnTrack is a Web 2.0+ application that requires modern internet browsers and machine hardware for the best user experience. Below are the minimal hardware and browser requirements for using KeepnTrack's **Administration** and **Kiosk** operations.

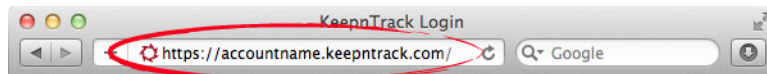
System Requirements for KeepnTrack

	Minimum	Recommended
KeepnTrack	Mac OS 10.5+ Windows XP+ G4, Pentium 4 (or equivalent); 1 GHz or faster 1 GB of RAM IE8* or IE9, FireFox 6+, Safari 5+ 1024 x 768 Screen Resolution	Mac OS 10.6+ Windows 7+ X86 or x64 Multi-Core/Processor 2 GB of RAM (or more) IE9, FireFox 6+, or Safari 5+ 1024 x 768 Screen Resolution

* For Windows XP, Internet Explorer 8 is the most current version.

Getting Started: Logging In

- On a computer that has internet access, open an internet browser window and enter your KeepnTrack login address into the **Address** field of the browser window (as shown below). For example: *https://youraccountname.keepntrack.com/*



- KeepnTrack's main **Login** window should appear. As a future shortcut, you may wish to bookmark the KeepnTrack **Login** window.
- Click on the **Help** button in the upper-right of the window to access an easy-to-follow **Logging into KeepnTrack** on-line help document.
- Provide your account username and password and click **Login**; these should have been provided to your account administrator at the time your KeepnTrack account was created.



- If you're logging in as an **Administrative Operator** that has permission to use both the **Administration** and **Kiosk**, you will be asked to select a service.
- If you would like to enter the **Administration** module, click **Administration** (see page 4).
- If you would like to start the **Kiosk** module, click **Kiosk** (see page 25).



- If you're logging in as an **Operator** that doesn't have permission to access the **Kiosk** module, the **Kiosk** button will *not* appear.
- If you're logging in as an **Operator** that doesn't have permission to access the **Administration** module, the **Administration** button will *not* appear.
- Depending on your operator privileges and permissions, you may (or may not) have access to certain areas of each KeepnTrack module.

Getting Started: Administration Module

Setting Up KeepnTrack

The **Kiosk** module is the front-end of the KeepnTrack system that interacts directly with the majority of your users and the **Administration** module is the back-end, which contains the preferences and settings that process output to (and from) the main **Kiosk** window.

In other words, the **Administration** module is where everything happens behind the scenes—very few of your KeepnTrack operators will have access to this section.



The **Administration** module consists of the following sections:

- **Home**—The tab is home to KeepnTrack's main **Administration** module, with subtabs containing user-created messages, helpful links to online help documentation and login information about the current operator and a method for operators to log out of the KeepnTrack program.
- **Manage**—This tab contains the tools you will need to manage the **People, History, Applications, Operators, Activities,** and **Access Control** data in your KeepnTrack system on a day-to-day basis.
- **Reports**—This tab provides tools for compiling and exporting data stored in KeepnTrack.
- **Utilities**—This tab provides tools for easily mass-manipulating data stored in KeepnTrack.
- **Preferences**—This tab provides access to **Account** and **Facility**-specific settings or options.

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Never use your default web browser window's back arrow; always click on the desired tab/subtab combination to go **Back** or switch to another section.

For information on the **Kiosk** module, please review the KeepnTrack **Kiosk** section on page 25.

Getting Started: Preferences

Now that you've logged into the **Administration** module of KeepnTrack, select the **Preferences** tab at the top of the window. The **Preferences** tab provides access to **Account** and **Facility**-specific settings and options.

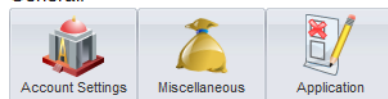
- **Account**—An “account” is your organization's unique entity in the KeepnTrack network of systems. All of your organization's data is stored and managed separately from data belonging to another organization. Under the **Account** subtab, you can configure account-specific settings and information. Please note that account settings are global; in accounts where multiple individual sites or facilities are configured, the **Account** preferences will affect or apply to all of them. You can configure global **Volunteer Applications**, **Kiosk Messages**, **Alerts**, and other such things here.
- **Facilities**—Facilities are the individual sites in your organization. Under the **Facilities** subtab you can create and manage site-specific settings and information such as **Kiosk Messages** and **Alerts**.

Account Preferences

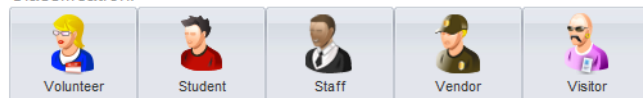
After **Preferences** has been selected from the top of the window, click on the **Account** subtab. Aside from what's listed above, KeepnTrack's **Account** (i.e. global) preferences are used to configure your list of ethnicities and the welcoming messages that people see on the main **Kiosk** window.

The **Account** preferences window is divided into three distinct groupings: **General**, **Classification**, and **Kiosk**. Start with the **General** preferences first (i.e. **Account Settings**, **Miscellaneous**, **Application**), reviewing the information contained within each section for content and accuracy.

General:



Classification:



Kiosk:



Work your way through all the remaining **Classification** and **Kiosk** preferences. Remember, these preferences set your global, district standards that become the defaults for *all* your future **Facilities**.

Each facility may modify the defaults created by the **Account** preferences using the **Facilities** preferences; but changes made to KeepnTrack's **Facilities** preferences will *only* be seen by that **Facility**'s operators and **Kiosk** users.

**NOTE:**

When you have finished adjusting information in any area of the preferences be sure to click **Save** in the upper-right corner of the window.

General**Account Settings:**

- Use **Set Account Logo** to **Choose Image File** and then **Upload Image**.

Miscellaneous:

- List any **Ethnicities** needed for your situation and check **Enable Vehicle Tracking** if required.

Application:

- If you wish to enable the online application feature, check that option.
- If you wish to display the **Online Application** activated in the **Kiosk** module, check that option.
- Enter the **Application Information** message for your school or district.
- Enter the **Application Received Message** for your school or district.
- Check all fields listed that you want shown on the online application.
- Check all fields listed that you want to be designated as required fields.

Classification**Volunteer:**

- Enter the **Volunteer Types** that fit your situation.

Student:

- If you want to print a slip for any of the above, check the appropriate box.

Staff:

- If the option of printing a name badge should be available, check the box for this option.

Vendor:

- If the option of printing a name badge should be available, check the box for this option.

Visitor:

- If the option of printing a name badge should be available, check the box for this option.

- N O T E -

Whenever there is a **Show Print Badge Checkbox in Kiosk** setting in the **Classification** preferences, it is used to control the option not whether or not it actually prints a name badge. The printing of the badge is actually part of the Person record and the option settings can be overridden. If the setting is changed at the **Kiosk** when the person checks in, it will be remembered.

Kiosk**Messaging:**

- Enter the **Kiosk Message** and **Kiosk Announcement**.

Facilities Preferences

KeepnTrack's **Facilities** (i.e. local) preferences are used to manage the individual facilities in your organization and to configure site-specific settings and information such as **Kiosk Messages** and **Alerts**.

Remember, each facility may add to or modify the defaults created by the **Account** preferences using the **Facilities** preferences; but changes made to KeepnTrack's **Facilities** preferences will *only* be seen by that facility's operators and **Kiosk** users.

Just like **Account** preferences, **Facilities** preferences are divided into three distinct groupings: **General**, **Classification**, and **Kiosk**. After each facility is created, make adjustments to individual facility preferences as needed and review them for accuracy.



NOTE:

When you have finished adjusting information in any area of the preferences be sure to click **Save** in the upper-right corner of the window.

General

Facility Information:

- From the **Management Records List: Tools** section, click the **Add Facility** button; for your convenience, the bottom of the **Management Records List** shows the number of facilities defined and the total number of licensed facilities allowed for your organization.
- The **Management Records List: Tools** section also allows you search for a particular facility and view the information associated with that facility by using the **Search Facilities** button (described on the next page).
- Complete the basic information for each new facility as required, paying close attention to the **Facility ID**—this *must* be unique. Ideally, your **Facility ID** should relate to the one specified in your student information system. For example, if the number for your facility is 440 (or the short code is GMS) in your student information system, then using *that* number (or short code) is highly recommended.
- Please note, once you have reached the limit for facilities licensed to your account, the **Add Facility** button will appear grayed out and no longer be available to you.

Classification

Volunteer, Staff:

- Personalizing your facility's **Volunteer** and **Staff Types** is critical and requires your utmost attention.

Kiosk

Alerts:

- Individualize your **Alerts**—the email/text address(es) of your facility's emergency contact person(s). Alerts are sent to your emergency contacts when a visitor attempting to sign in is rejected from or denied access to your facility for *any* reason (e.g. triggers a sex offender match).

Messaging:

- Individualize your **Kiosk Message** and **Kiosk Announcement** (the welcoming messages that people see on the main **Kiosk** window).

Step-by-Step: Search Facilities

The **Search Facilities** window allows you to search your database contingent upon information that you supply. The results of your lookup will be collated in the **Management Records List** pane.

To look up a facility:

- Step 1. The **Search Facilities** window is accessed by clicking on the magnifying glass icon in the lower-right corner of the **Management Records List: Tools** section of the of the **Facilities** preferences subtab.
- Step 2. Enter search term(s) in one or more of the fields of this window.
- Step 3. Click on **Search** or press *<enter>*.
- Step 4. If successful, a list of facilities matching the provided search term(s) will appear in the **Management Records List** pane. If the full list cannot be displayed, there will be a scrollbar that allows you to view additional facilities. If your search fails to find any facilities, then the text “*There are no facility records to be displayed*” will appear.
- Step 5. To view the information for a particular facility, select (highlight) that facility from the **Management Records List** generated by the search. Selecting a facility from the **Management Records List** will populate the fields in the **Current Record** section of the window.

Step-by-Step: Add Facility

Conveniently, customers can create their own facilities; however, the licensing restrictions (set using **Account** preferences) are enforced by COMPanion. The **Account Settings** preference window will display how many licensed facilities are being used (i.e. defined). When the limit is reached, the **Add Facility** button in the **Tools** section of the **Management Records List** becomes unavailable.

If you would like to add a new facility to your database:

- Step 1. Click the **Add Facility** (“ + ”) icon in the **Management Records List: Tools** section of the of the **Facilities** preferences subtab.
- Step 2. This will clear the fields in the **Current Record** section, allowing operators to add information about their facilities. It is not necessary to re-enter all the information that was previously provided in the **Account** tab—just information that is particular to the current facility.
- Step 3. When finished, click **Save**.

Getting Started: Manage Operators

The **Manage** tab contains the tools you will need to manage data in your KeepnTrack system on a day-to-day basis. The **Operators** subtab is where you will configure your operators and their abilities. Operators can be allowed to access **Administrative** functions, **Kiosk** operations, or both. Many **Kiosk** options and settings specific to the **Drivers License Scanner** are also customizable on an operator-by-operator basis.

Operators

Operators are the personnel associated with your account that have certain privileges when using KeepnTrack. Your first KeepnTrack login (or “operator” login) will automatically be your main database (or district) operator—so make sure to edit the new **Operator** fields to meet your needs. Once added, your **Account** operator can be edited, but can *not* be deleted. KeepnTrack must always have *one* existing **Account** operator.

When a KeepnTrack license has been purchased, the school/district operator creates an **Account**-level login. From that point on, it’s up to the **Account** operator to further configure their facilities. Therefore, when another facility is added, configuration must be completed by the **Account** operator.

Account operators are authorized and responsible to change information on *all* the facilities contained in the KeepnTrack database, including all people activities.

Additional operators (**Regular** or **Facility**) may be added after the **Account** operator; perhaps one operator for each facility in your district.

Operator accounts are broken down into three distinct groups:

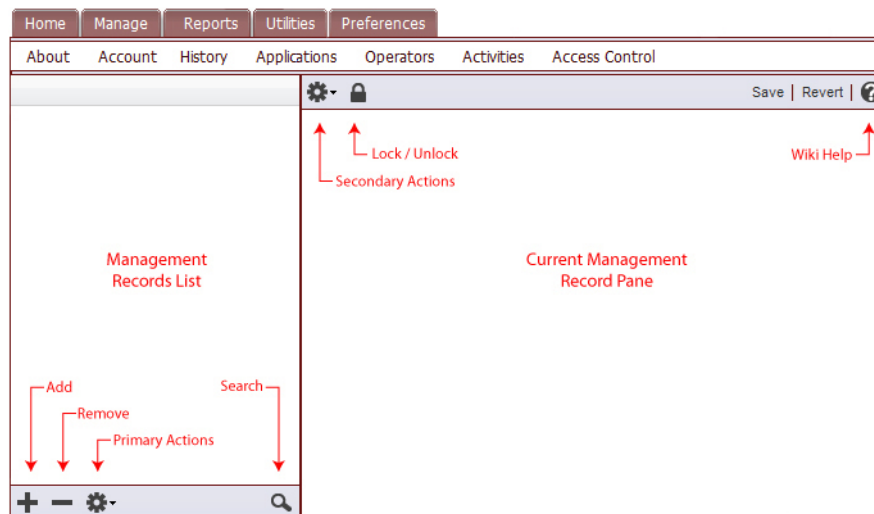
- **Account**—Used by your account/district operator this administrative level can create logins for all available facilities. You can have more than one **Account** operator.
- **Facility**—Used to manage one or more facilities, this administrative level has access to all reports and facility preferences.
- **Regular**—This operator level only has access to people lookup, reports, and activities.

- N O T E -

Account-level operators have access to their entire KeepnTrack database; this includes accounts, people, facilities, reports, etc. When a login is set up on an **Account** level, none of the permissions or facility selections apply—these pertain only to **Facility** and **Regular** level logins.

The **Manage** tab -> **Operators** subtab allows you create new, locate and edit existing, and even permanently delete operator records from your database.

The **Manage** tab -> **Operators** subtab consists of two distinct areas:



- The left hand side of the **Manage** tab -> **Operators** subtab belongs to the **Management Records List** and related tools.
- The larger, right-hand portion of the **Manage** tab -> **Operators** subtab consists of the **Current Management Record** pane where a selected (highlighted) record is displayed in full, along with associated tools that perform operations on said operator records.

The left-hand section of the **Manage** tab -> **Operators** subtab contains the **Management Records List** pane, where records (up to 2,000) matching user-provided **Search** criteria will be displayed; in fact, the main functionality of the window is directly contingent upon the search criteria you provide in the **Search Operators** window (accessed by clicking the magnifying glass icon in the lower-right corner of the **Management Records List** pane). When you have performed a suitable **Search**, the results of the operator lookup will be collated in the **Management Records List** pane.

The area situated below the **Management Records List** field contains several tools icons that are used for adding, removing, modifying, and finding operator records.

Highlighting/selecting an entry in the **Management Records List** will make that history record current in the **Current Management Record** (the right-hand section of the **Manage** tab -> **Operators** subtab) and populate the information fields in the **Personal Info**, **Contact Info**, **Permissions**, and **Facilities** tertiary tabs.

You will be unable to edit the data contained in **Current Management Record** fields until you click on the **Unlock** button.

Step-by-Step: Search Operators

The main functionality of the **Manage** tab -> **Operators** subtab is directly contingent upon the search criteria you provide in the **Operator Search** window.

To find an operator:

- Step 1. The **Operator Search** window is accessed by clicking on the magnifying glass icon in the lower-right corner of the **Management Records List: Tools** section of the **Operators** tab.
- Step 2. Enter search term(s) in one or more of the fields of this window.
- Step 3. Define the operator's facility or choose to search **All Listed Facilities** using the drop-down menu.
- Step 4. Click on **Search** or press *<enter>*.
- Step 5. If successful, a list of operators matching the provided search term(s) will appear in the **Management Records List** pane. If the full list cannot be displayed, there will be a scrollbar that allows you to view additional operators. If your search fails to find any operators, then the text "*There are no operator records to be displayed*" will appear.
- Step 6. To view the information for a particular operator, select (highlight) that operator from the **Management Records List** generated by the search. Selecting an operator from the **Management Records List** will populate the fields in the **Current Record** section of the window.
- Step 7. Once an operator has been located, you can make changes to their **Access Level, Login ID, Password**, etc.
- Step 8. When finished, click on **Save**.

- N O T E -

COMPanion *strongly* recommends that you make modifications to the default account operator as soon as possible for the security of your account.

Step-by-Step: Add Operator

If you would like to add new operator to your database, click the **Add Operator** icon. This will open a fresh, unlocked record in the **Current Management Record** section, allowing you to add information to the blank fields contained in the **Personal Info**, **Contact Info**, **Permissions**, and **Facilities** tertiary tabs.

It is crucial to consider the **Access Level** when creating a new operator.

The **Account**-level is for district operators and have access to *everything* on both **Administration** and **Kiosk** modules—regardless of what permissions are checked (or not checked). This level should only be assigned after careful thought and consideration.

The **Facility** and **Regular** levels only have access to what is checked on the **Permissions** subtab.

If you would like to add a new operator to your database:

- Step 1. Click the **Add Operator** (“ + ”) icon in the **Management Records List: Tools** section of the **Operators** tab.
- Step 2. This will clear the fields in the tertiary tabs of the **Current Record** section, allowing you to provide information about your operators.
- Step 3. Fill in *all* the blank fields in the **Personal Info** and **Contact Info** tertiary tabs; especially important is selecting the proper **Access Level** (see above) for your operator using the associated drop-down menu.
- Step 4. Using the **Permissions** tertiary tab, check the **Admin**, **Kiosk**, and/or **Device** permissions you wish to grant this operator.
- Step 5. From the **Facilities** tertiary tab, select the facilities associated with this operator.
- Step 6. When finished adding a new operator, click **Save**.

-
- Step 7. Create additional operators as needed with more restrictive permissions, if desired. Normally, a typical account will only have one **Account**-level operator, but can have more.

Additionally, there will be at least one **Facility**-level operator with administrative access for each **Facility**.

You can potentially also have one or more **Regular**-level operator with administrative access for each **Facility**.

The **Facility** and **Regular**-level operators have access to the **Administration** and **Kiosk** modules regardless.

- Step 8. Create additional operators as needed with **Kiosk**-level access only. In the steps above, you created administrative operators with varying levels of access to both the **Kiosk** and **Administration** components of KeepnTrack. In the same manner, you will now want to create operators for **Kiosk**-only functions as needed.

Getting Started: Manage People

The **Manage** tab contains the tools you will need to manage data in your KeepnTrack system on a day-to-day basis. The **People** subtab allows you create new, locate and edit existing, and permanently delete people from your database; you can also perform batch criminal and sex offender checks and import people records.

People

People are the individuals who frequent your facilities—students, staff, vendors, volunteers, and visitors.

The **Manage** tab -> **People** subtab allows you create new, locate and edit existing, and even permanently delete people from your database.

The **Manage** tab -> **People** subtab consists of two distinct areas:

- The left hand side of the **Manage** tab -> **People** subtab belongs to the **Management Records List** and related tools.
- The larger, right-hand portion of the **Manage** tab -> **People** subtab consists of the **Current Management Record** pane where a selected (highlighted) record is displayed in full, along with associated tools that perform operations on said records.

The left-hand section of the **Manage** tab -> **People** subtab contains the **Management Records List** pane, where records (up to 2,000) matching user-provided **Search** criteria will be displayed; in fact, the main functionality of the window is directly contingent upon the search criteria you provide in the **Search People** window (accessed by clicking the magnifying glass icon in the lower-right corner of the **Management Records List** pane). When you have performed a suitable **Search**, the results will be collated in the **Management Records List** pane.

The area situated below the **Management Records List** field contains several tools icons that are used for adding, removing, modifying, and finding people records.

Highlighting/selecting an entry in the **Management Records List** will make that person record current in the **Current Management Record** (the right-hand section of the **Manage** tab -> **People** subtab) and populate the information fields in the **Personal Info**, **Contact Info**, **Facilities**, **Classifications**, **Security**, **History**, and **Criminal Background Check (CBC)** tertiary tabs.

You will be unable to edit the data contained in **Current Management Record** fields until you click on the **Unlock** button.

You can also perform a **Sex Offender Check** using the **Actions** menu or document a new activity from the current person windows.

Step-by-Step: Search People

The main functionality of the **Manage** tab -> **People** subtab is directly contingent upon the search criteria you provide in the **Search People** window.

To find an person:

- Step 1. The **Search People** window is accessed by clicking on the magnifying glass icon in the lower-right corner of the **Management Records List: Tools** section of the **People** tab.
- Step 2. Enter search term(s) in one or more of the fields of this window.
- Step 3. Define the person's facility or choose to search **All Listed Facilities** using the drop-down menu.
- Step 4. Click on **Search** or press *<enter>*.
- Step 5. If successful, a list of people matching the provided search term(s) will appear in the **Management Records List** pane. If the full list cannot be displayed, there will be a scrollbar that allows you to view additional people. If your search fails to find any people, then the text "*There are no person records to be displayed*" will appear.
- Step 6. To view the information for a particular person, select (highlight) that operator from the **Management Records List** generated by the search. Selecting a person from the **Management Records List** will populate the fields in the **Current Record** section of the window.

Step-by-Step: Add Person (Manually)

There are two ways to add new people to your system. You can either add them manually from the **Manage** tab -> **People** subtab (described below) or automatically by importing a tab-delimited file via the **Import Person Records** selection found in the primary **Actions** menu of the **Manage** tab -> **People** subtab (described on page 16).

To manually add a new person to your database, click the **Add Person** icon. This will open a fresh, unlocked record in the **Current Management Record** section, allowing operators to add information to the blank fields contained in the **Personal Info**, **Contact Info**, **Facilities**, **Classifications**, **Security**, **History**, and **Criminal Background Check (CBC)** tertiary tabs.

If you would like to manually add a new operator to your database:

- Step 1. Click the **Add Person** (“ + ”) icon in the **Management Records List: Tools** section of the **People** tab.
- Step 2. This will clear the fields in the tertiary tabs of the **Current Record** section, allowing you to provide information about your person.
- Step 3. Work through all the sections of the person record; fill in as much information as you can into the blank fields of the **Personal Info**, **Contact Info**, **Facilities**, **Classifications**, **Security**, **History**, and **Criminal Background Check (CBC)** tertiary tabs.
- Step 4. Using the **Personal Info** and **Criminal Background Check (CBC)** tertiary tabs, add any **Notes** that are pertinent
- Step 5. From the **Facilities** tertiary tab, select the facilities associated with this person.
- Step 6. From the **Classifications** tertiary tab, select the people classification(s) (e.g. **Volunteer**, **Vendor**, **Student**, **Staff**, etc.) by checking the appropriate box(es).
- Step 7. From the **Criminal Background Check (CBC)** tertiary tab, you can perform a more in-depth and complete background check. COMPanion sells “tokens” for this service; as long as your account has tokens available, you can perform criminal background checks.
- Step 8. When finished adding a new person, click **Save**.

- N O T E -

A new person record is required to have a **Person ID**, **First & Middle** and **Last Name**, at least one or more **Classifications**, and at least one or more associated **Facilities**. Additional information is *highly* recommended, but purely optional.

Import Person Records

There are times when you'll want to add information into KeepnTrack from other sources (e.g. person information from your district or facility database). The process of adding information into KeepnTrack from outside sources is called importing. Once an import has been initiated, it runs independently from any other KeepnTrack operations. The import may be initiated from one browser, and monitored from another browser with access to the account; however, this action is *very strongly* discouraged.

Select Import Data Files

Operators with administrative privileges have the ability to import person data into their KeepnTrack system. The ability to perform an import is dependent on the operator's access level. **Account**-level operators have the access to run an import but not **Facility** or **Regular**-level operators.



Duplicate Handling

First, select how you would like KeepnTrack to handle duplicate records on import. For instance, if you were to import a **Staff** member that already exists in your database, you can have the existing **Person** record updated or created anew with a different **Person ID**.

- **Update**—If this is selected from the **Duplicate Handling** drop-down menu, existing **Person** records will be updated if they are discovered.
- **Create New**—If this is selected from the **Duplicate Handling** drop-down menu, then duplicate records will be ignored and each imported record will be created anew.

Data File Encoding

- **None**—The default state of this drop-down menu; select this if the file you are importing contains no known data encoding. Only adjust this setting if you are aware of special circumstances regarding the pre-existing structure or format of your data file.
- **Windows**—Select this if the file you are importing was created using Windows Standard (ANSI) file encoding.
- **Macintosh**—Select this if the file you are importing was created using Macintosh Standard (ASCII) file encoding.
- **UTF-8**—Select this if the file you are importing was created using the 8-bit Unicode Transformation Format—the preferred encoding method for e-mail, web pages, and other places where text characters are stored or streamed.

Person Fields—Field Number

Person ID	1000	
Prefix	1100	
First Name	1007	
Middle Name	1008	appends to First Name with a <space>
Last Name	1006	
Suffix	1101	
Organization	1102	
Address One/Two	1011	Supports Address One\Adress Two for import; breaks apart the address at the \ into the two different fields
City	1112	
State	1013	
ZIP Code (Postal Code)	1014	
Country	1016	Country Code is two-digit code from ISO list
Volunteer		Blank=No, Yes=Yes, No-No, Volunteer=Yes
Student		Blank=No, Yes=Yes, No-No, Student=Yes
Staff		Blank=No, Yes=Yes, No-No, Staff=Yes
Vendor		Blank=No, Yes=Yes, No-No, Vendor=Yes
Volunteer Type	1120	Blank=Blank, No Match=Blank, Exact Match=Type
Preferred Activity	1121	
Home Phone	1017	
Work Phone	1130	
Mobile Phone	1131	
Email Address	1019	
Facilities	1027	Repeating; can be used once for each facility, matching Facility ID
Notes	1020	
Ethnicity	1132	
Sex	1032	Male=1 (or M), Female=2 (or F)
Birthdate	1045	
Emergency Contact	1133	
Medical Conditions	1134	
Social Security Number	1002	

Driver License Number	1140	
Driver License State	1141	
License Plate Number	1142	
Vehicle Registration State	1143	
Vehicle Make	1144	
Vehicle Color	1145	
Teacher	1150	
Grade	1010	
Bus #	1151	
Bus #2	1155	
Homeroom	1004	
Student ID	1001	
Family ID	1152	
Student May Be Checked Out	1153	Yes=Yes, No=No, Blank=No
Authorized to Check Out	1154	a \ in any field is converted into a carriage return; Repeating - append together with \\ to make new a paragraph
Staff Type	1160	
Hire Date	1161	
Staff ID	1162	
Employer	1170	
Checkin Allowed	1171	Yes=Yes, No=No, Blank=No
Security Approved	1176	Yes=Yes, No=No, Blank=No
Criminal Conviction	1172	Yes=Yes, No=No, Blank=No
Last Background Check	1173	
Login ID	1052	
Password	1003	
Message to this Patron	1174	
Print Badge at Check In	1175	Yes=Yes, No=No, Blank=No
Inactive	4500	Yes=Inactive, No=Active, Blank=Active
Effective Date	4501	MM/DD/YYYY for person end date.
Expiration Date	4502	MM/DD/YYYY for person end date.

Step-By-Step: Import Person Records

Since **Person ID** is a required field, KeepnTrack will generate a **Person ID** for every person record that does not have a **Person ID** in the import file. Depending on your **Duplicate Handling** settings, updates will first try to match on the primary field which is the **Person ID**; if there is no **Person ID**, then it will use other fields such as the **Social Security Number (SNN)**, **Staff ID**, or **Student ID** in an attempt to match. The file being imported *must* be in a tab-delimited format.

While files from a student information system may be used to import basic information on people (name, address, etc.), usernames and passwords may also be imported.

To import a file:

- Step 1. The **Import People Records** window is accessed by selecting **Import Person Records** from the **Actions** menu in the **Management Records List: Tools** section of the **People** tab.
- Step 1. Specify how you want duplicates handled using the **Duplicate Handling** drop-down menu (previously detailed on page 16).
- Step 1. Choose how you want the date file encoded using the **Data File Encoding** drop-down menu (previously detailed on page 16).
- Step 1. Use the **Browse** button to open an operating system standard explorer window, allowing you to guide KeepnTrack to the location your person information files.
- Step 2. Select (highlight) the file from the system standard explorer window and click **Open**.
- Step 3. After you have chosen the file you would like to import, click on the **Next** button to upload it to the KeepnTrack server and advance to the **Specify Field Mapping** section (page 17).
- Step 4. When the **Specify Field Mapping** window opens, match the field name with the data that should go in that field, and then click **Import Data** when all fields are matched to the information being imported.
- Step 5. *Voilà!*—your information has been imported.

Batch Sex Offender Check

If you choose the **Sex Offender Check** selection, KeepnTrack will query the current person record against the sex offender database and then, when finished, immediately display the results of the query. While performing a batch **Sex Offender Check**, the page will update every five seconds to show its progress.

You can click the **Cancel Sex Offender Check** link at any time to quit a batch process.

Step-by-Step: Individual Sex Offender Check

To run a sex offender check on a selected (highlighted) individual from the **Management Records List** that your people **Search** produced (page 15), select **Sex Offender Check** from the secondary **Actions** menu.

To run a sex offender check on a single individual from the list:

- Step 1. Select (highlight) a person from the **Management Records List**.
- Step 2. The **Sex Offender Check** selection is located in the secondary **Actions** menu of the **People** tab.
- Step 3. Once the selection is made, KeepnTrack will query the current person record against the sex offender database and then, when finished, immediately display the results of the query.
- Step 4. If the **Sex Offender Check** or any additional background check indicates a problem, use the **Security** tertiary tab to remove the **Checkin Allowed** checkmark or to mark the **Criminal Conviction** box. You may also enter a **Message** in the **Security** tertiary tab such as "Please visit the school administrator immediately!"
- Step 5. If the person is clear of criminal convictions and is not shown to be a sex offender, you may use the **Security** tertiary tab to check the **Checkin Allowed** box and to give the individual a **Login ID (email)** and **Password**.

- N O T E -

The **Login ID (email)** and **Password** will enable the volunteer to manually log in to KeepnTrack and add an activity that occurred offsite or after hours. Others people (with the ability to log in) can view their activities, but not add anything to them.

Getting Started: Manage Activities

Activities are the traceable events that happen in or around your facility. The people who work at or volunteer for these events at your facility can be monitored and their total time recorded.

Each **Activity** is assigned a default **Classification** that KeepnTrack then uses to group people together in order to create comprehensive reports for each event. In other words, a **Classification** is used to group the events or activities that the people in your system can perform, and to help define groups of people. Activities can range from everything from assemblies, field trips, and community service to dental appointments, guidance counseling, and sports events.

There are three types of activities: **timed**, **untimed**, **sign in**, and **untimed, sign out**.

- **Timed** activities have recorded stop and start times, and the time between the two events is recorded as the total time for that activity. Timed activities also include the date and time that the activity was initiated and concluded¹.
- **Untimed, Sign In** and **Untimed, Sign Out** activities simply record the date and time that the activity was concluded or initiated, but does not tally the time in between. Further, untimed sign-in activities do not require a sign-out of the same activity to be complete and untimed, sign-out activities do not require a sign in. An example of an untimed activity would be “*Student, Late Arrival*”; this activity would only have an expectation of when a student arrived but does not expect a sign out or a duration to be recorded.

Activities

The **Activities** section provides a means for viewing the activities that have been created for KeepnTrack.

The **Manage** tab -> **Activities** subtab allows you create new, locate and edit existing, and even permanently delete activities from your database².

The **Manage** tab -> **Activities** subtab consists of two distinct areas:

- The left hand side of the **Manage** tab -> **Activities** subtab belongs to the **Management Records List** and related tools.
- The larger, right-hand portion of the **Manage** tab -> **Activities** subtab consists of the **Current Management Record** pane where a selected (highlighted) record is displayed in full, along with associated tools that perform operations on said records.

The left-hand section of the **Manage** tab -> **Activities** subtab contains the **Management Records List** pane, where records (up to 2,000) matching user-provided **Search** criteria will be displayed; in fact, the main functionality of the window is directly contingent upon the search criteria you provide in the **Activity Search** window (accessed by clicking the magnifying glass icon in the lower-right corner of the **Management Records List** pane). When you have performed a suitable **Search**, the results will be collated in the **Management Records List** pane.

The area situated below the **Management Records List** field contains several tools icons that are used for adding, removing, modifying, and finding activity records.

Highlighting/selecting an entry in the **Management Records List** will make that person record current in the **Current Management Record** (the right-hand section of the **Manage** tab -> **Activities** subtab) and populate the information fields in the **Details** and **Destinations**³ tertiary tabs.

You will be unable to edit the data contained in **Current Management Record** fields until you click on the **Unlock** button.

1. To elaborate, people are expected to manually “sign out” of timed activities or a default time *will* be allotted. In order for KeepnTrack to work properly, however, a person *really* should sign in and then out of an activity when leaving.

2. An example of an activity would be **Classroom**.

3. Some valid examples of a destination would be “Mr. Smith”, “Mrs. Jones”, “Principal”, etc.

Step-by-Step: Activity Search

The main functionality of the **Manage** tab -> **Activities** subtab is directly contingent upon the search criteria you provide in the **Activity Search** window.

To find an activity:

- Step 1. The **Activity Search** window is accessed by clicking on the magnifying glass icon in the lower-right corner of the **Management Records List: Tools** section of the **Activities** tab.
- Step 2. Enter search term(s) in one or more of the fields of this window.
- Step 3. Define the classification or choose to search **All Classifications** using the drop-down menu.
- Step 4. Click on **Search** or press *<enter>*.
- Step 5. If successful, a list of activities matching the provided search term(s) will appear in the **Management Records List** pane. If the full list cannot be displayed, there will be a scrollbar that allows you to view additional activities. If your search fails to find any activities, then the text *“There are no activity records to be displayed that match the criteria entered”* will appear.
- Step 6. To view the information for a particular activity, select (highlight) that activity from the **Management Records List** generated by the search. Selecting an activity from the **Management Records List** will populate the fields in the **Current Record** section of the window.

Step-by-Step: Add Activity

If you would like to add new activity to your database, click the **Add Activity** icon. This will open a fresh, unlocked record in the **Current Management Record** section, allowing you to add information to the blank fields contained in the **Details** and **Destinations** tertiary tabs.

If you would like to create a new KeepnTrack activity:

- Step 1. Click the **Add Activity** (“+”) icon in the **Management Records List: Tools** section of the **Activities** tab.
- Step 2. This will clear the fields in the tertiary tabs of the **Current Record** section, allowing you to provide information about your activity.
- Step 3. Work through all the sections of the activity record; fill in as much information as you can into the blank fields of the **Details** and **Destinations** tertiary tabs.
- Step 4. When finished adding new activity information, click **Save**.

Getting Started: Reports

The **Reports** tab provides tools for compiling and exporting data stored in KeepnTrack.

Most reports have three possible formats in which they can be run. If you click the **Run Report** button, KeepnTrack will prepare an on-line report in a portable document format (i.e. **PDF**). Selecting the **CSV** or **TAB**-delimited options will then generate a report that will be downloaded to your computer in a text format document. Once downloaded, it can then be opened and edited in a spreadsheet program or stored as a permanent record of the report.

- **People**—People-specific reports are located under the **People** subtab. These reports allow you to view detailed information for a particular person or range of people based on the criteria you provide.
- **History**—History and activities-specific reports are located under the **History** subtab. These reports allow you to view detailed information for a particular activity or range of activities based on the criteria that you provide.
- **Background Check**—Background check reports allows you to create reports specific to the COMPanion **Criminal Background Check**, based on the criteria that you provide.
- **Other**—Miscellaneous reports are located under the **Other** subtab. These reports allow you to view information for a particular facility, operator, account or range of facilities, operators, and accounts based on the criteria that you provide.

Reports

The **Reports** tab -> **People** / **History** / **Other** subtab(s) allow you to create reports for particular information or a range of information based on the criteria that you provide and is usually divided into three sections; **Report Options**, **Report Selections**, and sometimes **Additional Selections** such as **Facility** and **Operator Selections**.

Step-by-Step: Running A Report

No matter if you're running a report for facilities, activities, people, or operators, the results are generated by the search criteria you provide:

- Step 1. Select the desired report from the **Report Name** drop-down menu.
- Step 2. Select the sort order from the **Sort By** drop-down menu.
- Step 3. Select the file output from the **Format** drop-down menu (e.g. **PDF**, **CSV**, or **TAB**-delimited).
- Step 4. If applicable, make your report selections (e.g. **First Name**, **Last Name**, **Facility**, **Person ID**, etc).
- Step 5. If applicable, make additional selections based on classification, facility, or operator information.
- Step 6. When you are ready to create your report, click on **Run Report**.

Getting Started: Kiosk Module

The KeepnTrack **Kiosk** differs greatly from the **Administration** module and is used to sign people of all classification types (e.g. visitors, volunteers, staff, students, etc.) in and out of your facility. The **Kiosk** window is what the majority of your users will interact with.

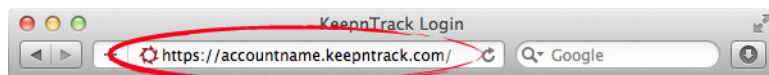
Once the **Administration** side of things has been squared away (i.e. **People**, **Operators**, **Account** and **Facilities** preferences have been created or established, you are ready for to use the **Kiosk** module to begin tracking people and their activities. Reporting and other tools will be available to all operators with administrative access in the **Administrative** component of the software. Operators with privileges for both components will be provided with options at login.

Logging In to the Kiosk

Although a succinct summary appears below, a more thorough explanation for logging into KeepnTrack's **Kiosk** module is covered on page 2.

- In order to sign in to your facility's kiosk window, open an internet browser window and enter your KeepnTrack login address into the **Address** field of the browser window (as shown below). For example:

<https://youraccountname.keepntrack.com/>



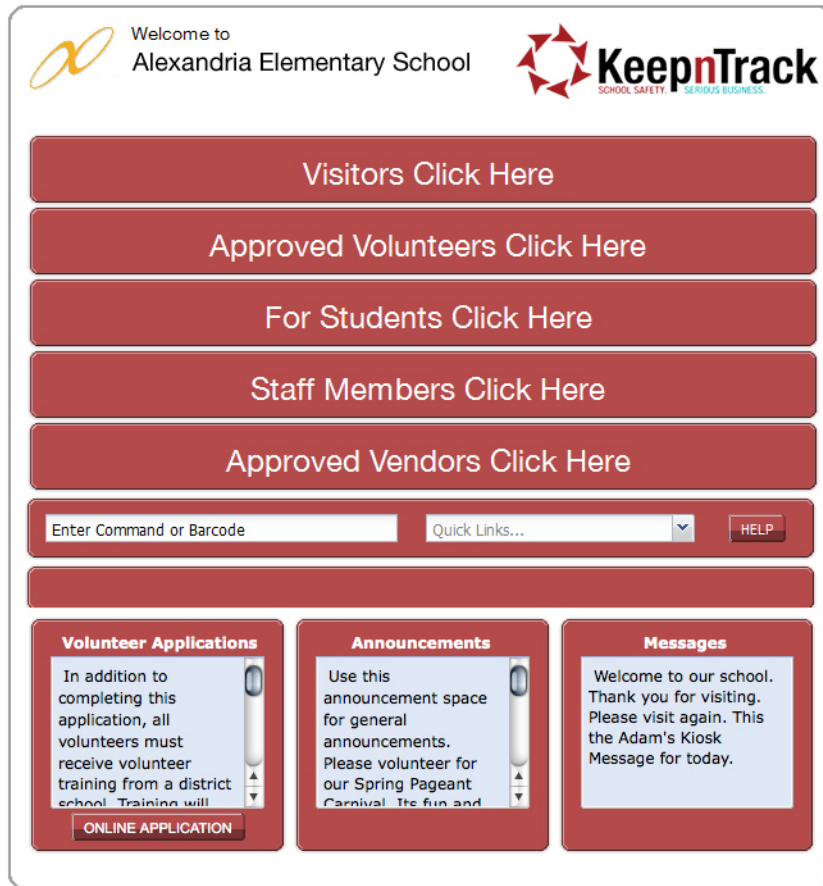
- Provide your account username and password and click **Login**; these should have been provided to your account administrator after having officially licensed use of the KeepnTrack software.
- KeepnTrack's main **Login** window should appear.
- Your login information will determine which section(s) you may access. If you're logging in as an **Administrator Operator** that has permission to use both the **Administration** and **Kiosk**, you will be asked to select a service. If you're logging in as an **Operator** that doesn't have permission to access the **Administration** module, you'll be automatically forwarded to **Kiosk** module.
- If you're given a choice, select KeepnTrack's **Kiosk** module.



- For operators with access to more than one facility, the **Please Select A Facility** window will appear.
- Using the **Please Select A Facility** drop-down menu, select the facility for which **Kiosk** you would like to access. Depending on your administrative preferences, you may not have authority to select or access **Kiosk** windows for facilities other than your own.
- Once you've successfully logged in and selected your facility, the **Kiosk** window will appear.

KeepnTrack Kiosk

- The main **Kiosk** window will stay logged in until logged out, or the automatic logout time is reached.



- N O T E -

Never use your default web browser window's back arrow; always use the **Start Over** button to switch to another section.

Printer Settings Dialog

On this page, the first time an **Operator** signs into the **Kiosk** they will be presented with a popup dialog box asking them to select if they have a printer attached to this kiosk, what type of printer, and what type of paper is installed with this printer. This dialog consists of four options.

- **No printer**—No printer is attached and this **Kiosk** will not be printing any person badges.
- **DYMO 400 Labelwriter**—This is the main type of printer associated to the KeepnTrack Kiosks. Select the Labelwriter 400 if you have a DYMO 400 or a DYMO 450.

For DYMO 450 printers, please contact KeepnTrack technical support at 1-800-320-5830 for installation instructions.

- **DYMO Twin Turbo**—The Twin Turbo model consists of two printer heads under a single unit. This will need a change to the Activity preference to enable.
- **Dual 400 Labelwriters**—Two DYMO 400 Labelwriter printers. Similar setup as the Twin Turbo with changed needed to the Activity preferences.

Contact KeepnTrack technical support at 1-800-320-5830 for more information and setup instructions.

- N O T E -

Nearly all the information contained on the main **Kiosk** window can be customized from the **Administration** module (i.e. the **Account** preferences); this also includes the pictures used for your facility and your district. In this way, KeepnTrack allows users to configure the type of interface they need for the facility they are operating.

- N O T E -

When using a driver's license scanner, the blinking cursor *must* be in the white field immediately before the **Quick Links** drop-down menu. The scanner only may be used for visitors and will only fill in the name and birthdate fields.

Kiosk Window Overview

The main purpose of the **Kiosk** window is to easily sign the people who use your facility in and out. There are five default classifications: **Visitor**, **Approved Volunteer**, **Student**, **Staff Member**, and **Approved Vendor**. This list can be customized and certain classifications disabled in your **Operators** tab -> **Permissions** subtab under the **Kiosk** section (see page 9 for more information).

For example, you can set up an unattended **Kiosk** near the back door of the cafeteria—used specifically for vendors to sign in and out. In this instance, you wouldn't need the **Visitor**, **Student**, or **Staff Members** options available.

The **Kiosk** window is used the same way for every classification type (visitors, volunteers, etc) whose hours and activities you would like to record.

For example, after selecting the person classification, when the **Sign In/Out** button is clicked, a new window appears, asking for users to identify themselves through various methods. Certain people are asked to supply their job numbers, date of birth, identification code, or the make and model of their vehicles. Everybody is required to enter their full name.

If more than one person has matching name information, KeepnTrack asks them to select the correct person or provide additional information. Duplicate members are not allowed to sign in; however, there are some exceptions to this rule.

Next, KeepnTrack asks users to select which **Activity** they are there to attend. All system activities are configurable within your **Manage** tab -> **Activities** subtab preferences.

Finally, the person will be verified (or rejected) and officially signed in to the facility. When applicable, the name badge will also be printed.

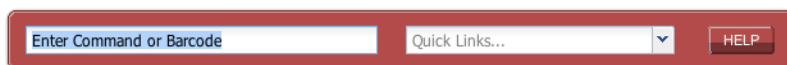


- N O T E -

Each **Sign In/Out** window will provide the ability to **Start Over** or **Go Back** one screen.

Command Line

The primary purpose of the command line is to quickly scan barcodes on printed name badges. The command line has the ability to act as the input field for **Quick Links** (described below).



The **Command Line** allows an operator to sign people in for different classifications by typing in a person's name or a person's ID number. KeepnTrack will then match the name to an existing person record within the facility and move to the activity selection screen. If multiple names match, a list will appear, showing the possible matches as well as the classification of the possible matches.

If a person record has multiple classifications, a list of the matching classifications will display and can be selected.

The **Command Line** can also be used for quick exit from the facility. If the person has already signed into an activity entering their name, person ID, or transaction barcode (located on the person badge printed on entry), then operators can quickly sign that person out of their activity.

When your account has been enabled for SMS messaging, typing a message such as “911 Help” in the Kiosk's **Command Line** will result in the text message “Help” being sent to all authorized recipients.

Special Messages and Announcements

The bottom-half of your main **Kiosk** window includes special facility information and messages.



- **Volunteer Applications**—Click the **Online Application** button in this section to be taken to KeepnTrack's online volunteer application.
- **Announcements**—Use this section to make special announcements concerning school or district activities.
- **Messages**—This text, which welcomes your KeepnTrack guests, can be modified in the **Account/Facilities General** preferences.

Quick Links

Quick Links are instant reports that provide information about who's currently at your facility or who's visited your facility during the course of the day. Depending on individual operator settings, some of these may not be available.

- **Who's here now?**—This report shows you a list of who is currently signed in and visiting your facility. This report includes the identification number (if available), person name, time of check in, classification type, and activity type.
Another feature of the Whose here now report is the ability to Sign Out people directly from this report. On the report window located on the bottom left there is a button called Sign Out. Select a name from the report, the name will highlight in blue, and then select the button. This will then Sign Out the person from the activity.
- **Who's been here today?**—This report shows you a list of all the people who are currently signed in or those who have signed out from your facility. This reports includes identification number, name, time of check in and check out, classification type, and activity type.
- **Find a vehicle**—To find a vehicle, first enter a license plate number in the command line and then choose **Find a Vehicle** from the **Quick List** drop-down menu. If a matching vehicle is found in your list of current visitors, it will appear in a report containing the vehicle license number, owner, phone, and activity attending.
- **Daily volunteer report**—This report shows you a list of the volunteers who have signed into the facility for the current day. This reports includes identification number, name, time of check in and check out, activity type, and duration.
- **Daily staff report**—This report shows you a list of staff members who have signed into the facility for the current day. This reports includes identification number, name, time of check in and check out, activity type, and duration.
- **Daily early dismissal report**—This report shows you a list of the students who have signed out of the facility for early dismissal for the current day. This reports includes identification number, name, time of check out, and activity type.
- **Daily late arrival report**—This report shows you a list of the students who have arrived late to the facility for the current day. This reports includes identification number, name, time of check in, and activity type.
- **Reprint Last Label**—This report will attempt to print a label for the last person who has signed into the facility. Pop-ups must be allowed in order for this report to run successfully.

Step-by-Step: Visitor Sign In

The **Visitor** section is for people who will be infrequently attending your facility (e.g. parents or grandparents).

After selecting **Visitor** and then the **Sign In** button, a new window is presented and the visitor will be asked to identify themselves. If your facility preferences are set for vehicle tracking, the new visitor should also provide their vehicle make, model, and license plate number.

Once they click the **Continue** button, an automatic sex offender check is performed.

If they pass the sex offender check and have not already signed in to the KeepnTrack system earlier that day, they will be allowed to select an activity. A list of selectable activities for which they can sign in for is presented; a badge printing option is also available.

Once they have initiated their sign in and selected an activity, a verification will appear as a message in the main **Kiosk** window.

- N O T E -

KeepnTrack allows you to capture an image from an individual driver's license or identification card using the **Scanshell 800 License Scanner** under the **Visitor Sign In**. Modifications to the **ID Scan OCR** software settings are required to utilize this capability.

Visitor: Select Person

First, supply your visitor's full name, including middle name (if applicable). Next, supply the birthdate and vehicle information (make, model, and license plate number).

Click the **Continue** button to proceed to step two or the **Start Over** button to return to the main **Kiosk** window.

Visitor
Sign In
Select Person

VISITOR SIGN IN

Enter Visitor's full name and birthdate.

Visitor's full name

Visitor's birthdate (mm/dd/yyyy)

Visitor's vehicle make, model, and color

Visitor's vehicle license plate number

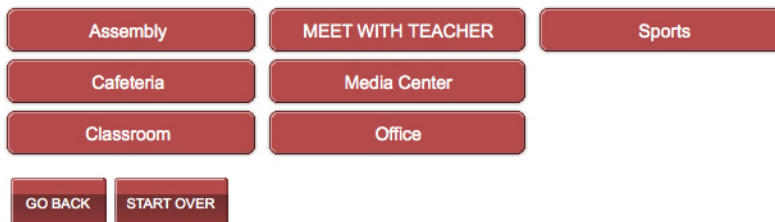
START OVER
CONTINUE

Visitor: Select Activity

Now, select the activity in which the visitor is attending. **Administrators** will be able to modify and append the list of selectable activities from the **Manage** tab -> **Activities** subtab.

Some activities will have subcategories called **Destinations**; for example, **Classroom** could be the primary activity, but you wouldn't see the forty-eight teachers you may have set as **Destinations** within that activity until you click on the **Classroom** button. When clicking on an activity has an (optional) **Destination**, instead of forwarding you to the next step (**Verify/Print Badge**), you will be directed to the **Destinations** subcategory.

Check the **Print Badge** box in order to print a visitor badge at the end of the verification process. You can enable/disable badge printing by default using the **Account/Facilities Visitor Preferences** window.

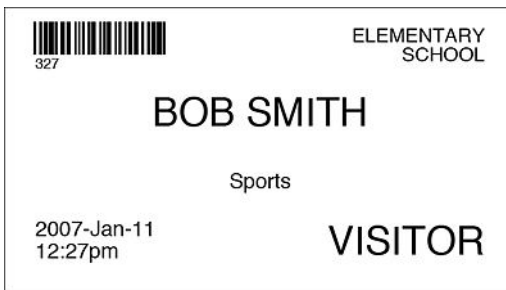


Click the **Go Back** button to return to the **Select Person** step or **Start Over** to return to the main KeepnTrack **Kiosk** window.

Visitor: Verify/Print Badge

The verification message appears after completing the first two steps. You will see the text “Visitor has been signed in” and the activity for which they were signed in on the main **Kiosk** window. At this point, your visitor is signed in and a visitor barcode will automatically print (if your preferences are set to automatically print badges).

Shown below is an example of the visitor name badge that will print. Name badges include the person identification number (and barcode), facility name, visitor name, activity name, classification name (in this case, visitor), and date and time of sign in.



Step-by-Step: Volunteer Sign In

The **Approved Volunteer** section is for a people who volunteer at your facility. Once signed in, all volunteer hours and activities are tracked by the system.

Volunteer: Select Person

First, select **Approved Volunteer** and then select **Sign In**. Next, supply your volunteer's full name, including middle name (if applicable), the birthdate and vehicle information (make, model, and license plate number). Click the **Continue** button to proceed to step two or the **Start Over** button to return to the main **Kiosk** window.

Approved Volunteer Sign In **Select Person**

VOLUNTEER SIGN IN

Enter Volunteer's name or scan identification.

Volunteer's name or id number

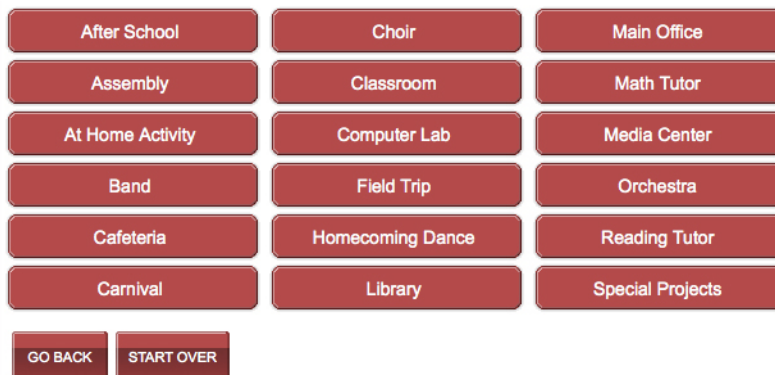
State Issuing ID

Volunteer: Select Activity

Now, select the activity in which the volunteer is participating. **Administrators** will be able to modify and append the list of selectable activities from the **Account/Facilities Visitor Preferences** window.

Some activities will have subcategories called **Destinations**; for example, **Classroom** could be the primary activity, but you wouldn't see the forty-eight teachers you may have set as **Destinations** within that activity until you click on the **Classroom** button. When clicking on an activity has an (optional) **Destination**, instead of forwarding you to the next step (**Verify/Print Badge**), you will be directed to the **Destinations** subcategory.

Check the **Print Badge** box in order to print a visitor badge at the end of the verification process. You can make badge printing enabled/disabled by default using the **Account/Facilities Visitor Preferences** window.



Whether the **Print Badge** option is enabled/disabled during **Sign In** depends upon the **Print Badge at Checkin** setting in the individual **Volunteer** record. The previous status of the **Print Badge at Checkin** option will be retained; meaning, if the **Print Badge** box was checked on the previous **Sign In**, then it will be checked the very next time that person volunteers.

Click the **Go Back** button to return to the **Select Person** step or **Start Over** to return to the main KeepnTrack **Kiosk** window.

Volunteer: Verify/Print Badge

The verification message appears after completing the first two steps. You will see the text “*Volunteer has been signed in*” and the activity for which they were signed in on the main **Kiosk** window. At this point, your volunteer is signed in and a barcode will automatically print (if your preferences are set to automatically print badges).



Shown above is an example of the volunteer name badge that will print. Name badges include the person identification number (and barcode), facility name, volunteer name, activity name, classification name (in this case, volunteer), and date and time of sign in.

Step-by-Step: Students Sign In

The **Enrolled Student** is allowed to sign in/out for an activity, or explain why they have an **Early Dismissal** or **Late Arrival**.

Once students are signed up for an activity, they can be easily tracked and reported on using the KeepnTrack system.

Student: Select Person

First, select the **Enrolled Student** button and then either **Sign In**, **Sign Out**, **Early Dismissal**, or **Late Arrival**. Next, supply the student's full name, including middle name (if applicable). Finally, supply the birthdate and vehicle information (make, model, and license plate number).

Student Sign In screen showing the 'Select Person' button highlighted. The screen displays the title 'STUDENT SIGN IN' and the instruction 'Enter Student's name or scan identification.' Below this are three input fields: 'Student's name or id number', 'Student's vehicle make, model, and color', and 'Student's vehicle license plate number'. At the bottom of the screen are two buttons: 'START OVER' and 'CONTINUE'.

If the student is already signed in for a timed activity, KeepnTrack will ask to sign the student out from said activity before they may be signed in to a new activity (timed or untimed).

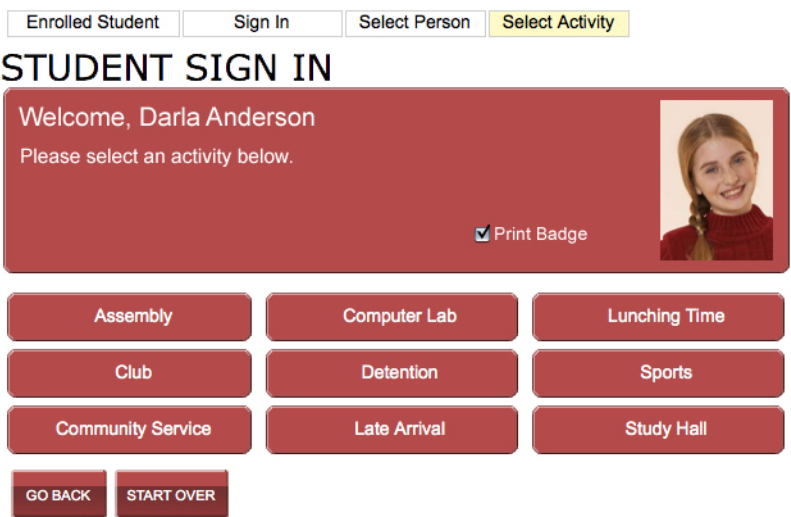
Click the **Continue** button to proceed to step two or the **Start Over** button to return to the main **Kiosk** window

Student: Select Activity

Now, select the activity in which the student is participating. Administrators will be able to modify and append the list of selectable activities from the **Manage** tab -> **Activities** subtab.

Some activities will have subcategories called **Destinations**; for example, **Classroom** could be the primary activity, but you wouldn't see the forty-eight teachers you may have set as **Destinations** within that activity until you click on the **Classroom** button. When clicking on an activity has an (optional) **Destination**, instead of forwarding you to the next step (**Verify/Print Badge**), you will be directed to the **Destinations** subcategory.

Check the **Print Badge** box in order to print a student badge at the end of the verification process. You can make badge printing enabled/disabled by default using the **Account/Facilities Student Preferences** window.



Whether the **Print Badge** option is enabled/disabled during **Sign In** depends upon the **Print Badge at Checkin** setting in the individual Student record. The previous status of the **Print Badge at Checkin** option will be retained; meaning, if the **Print Badge** box was checked on the previous **Sign In**, then it will be checked the very next time that student signs in for an activity.

Click the **Go Back** button to return to the **Select Person** step or **Start Over** to return to the main KeepnTrack **Kiosk** window.

Student: Verify/Print Badge

[The verification message appears after completing the first two steps in the main **Kiosk** window. You will see the text “*Student has been recorded for activity*” and then the activity name for which they were signed in.



Student Darla Anderson Has signed out from Assembly.

Student: Sign Out

Upon clicking the **Enrolled Student** and then **Sign Out** button, the student is asked to provide their name.

If more than one student with the same name is listed as attending the facility, you will have to select the correct name and activity from a list.

If only one student with that name has been signed in to the facility, they will be automatically signed out and a thank you message will be displayed.

If you try to sign out and the name you supply doesn't match anyone currently signed in to the system for a timed activity, then KeepnTrack will proceed to display all untimed activities configured as **Untimed**, display under **Sign-Out** in your **Manage** tab -> **Activities** subtab.

Step-by-Step: Staff Sign In

The **Staff Member** section is for the people who work at your facility. Used for signing in, all employee hours and activities are tracked by the system.

Staff: Select Person

After selecting **Staff Member** and **Sign In** supply your employee's full name, including middle name (if applicable), or their person Id number. Next, supply the job number and vehicle information (make, model, and license plate number).

Student Sign In screen showing the following fields and buttons:

- Buttons: Student, Sign In, Select Person
- Title: STUDENT SIGN IN
- Instruction: Enter Student's name or scan identification.
- Input fields:
 - Student's name or id number
 - Student's vehicle make, model, and color
 - Student's vehicle license plate number
- Buttons: START OVER, CONTINUE

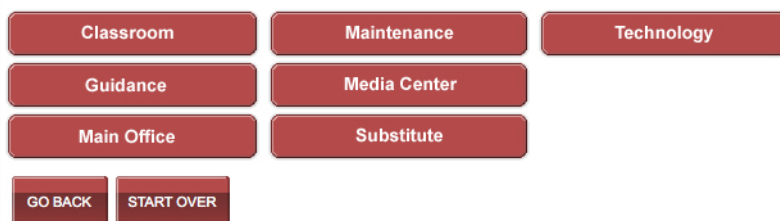
Click the **Continue** button to proceed to step three or the **Start Over** button to return to the main **Kiosk** window.

Staff: Select Activity

Now, select the activity in which your employee is participating. Administrators will be able to modify and append the list of selectable activities from the **Manage** tab -> **Activities** subtab.

Some activities will have subcategories called **Destinations**; for example, **Classroom** could be the primary activity, but you wouldn't see the forty-eight teachers you may have set as **Destinations** within that activity until you click on the **Classroom** button. When clicking on an activity has an (optional) **Destination**, instead of forwarding you to the next step (**Verify/Print Badge**), you will be directed to the **Destinations** subcategory.

Check the **Print Badge** box in order to print a staff badge at the end of the verification process. You can make badge printing enabled/disabled by default using the **Account/Facilities Staff Preferences** window.

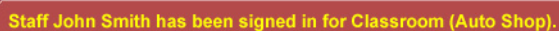


Whether the **Print Badge** option is enabled/disabled during **Sign In** depends upon the **Print Badge at Checkin** setting in the individual Staff record. The previous status of the **Print Badge at Checkin** option will be retained; meaning, if the **Print Badge** box was checked on the previous **Sign In**, then it will be checked the very next time that staff signs in using the **Kiosk**.

Click the **Go Back** button to return to the **Select Person** step or **Start Over** to return to the main KeepnTrack **Kiosk** window.

Staff: Verify/Print Badge

The verification message appears after completing the sign in/out process. You will see the text "*Staff has been signed in*" and the activity for which they were signed in on the main **Kiosk** window.

A screenshot of a verification message displayed in a red box with yellow text. The message reads: "Staff John Smith has been signed in for Classroom (Auto Shop)."

The window will reload to the main **Kiosk** window when completed.

Step-by-Step: Vendor Sign In

- N O T E -

This section is for regular vendors. If there is a substitute or your vendor representatives change frequently, they should sign in as visitors and you should add appropriate vendor activities to the visitor activities choices.

The **Approved Vendor** section is for a people who provide services for your facility. Once signed in, all vendor hours and activities are tracked by the system.

Vendor: Select Person

After selecting **Approved Vendor** and selecting **Sign In**, supply your vendor's full name, including middle name (if applicable). Next, supply the vehicle information (make, model, and license plate number).

The screenshot shows a navigation bar with three buttons: "Vendor", "Sign In", and "Select Person". Below the navigation bar is the title "VENDOR SIGN IN". The main form area has a red background and contains the following elements:

- Header: "Enter Staff member's name or scan identification."
- Field: "Staff member's name or id number" with a text input box.
- Field: "State Issuing ID" with a dropdown menu set to "Auto Detect" and a "SCAN ID" button.
- Field: "Vehicle License Number" with a text input box.
- Buttons: "START OVER" and "CONTINUE" at the bottom.

Click the **Continue** button to proceed to step three or the **Start Over** button to return to the main **Kiosk** window.

Vendor: Select Activity

Now, select the service (or activity) which the vendor is providing. Administrators will be able to modify and append the list of selectable activities from the **Manage** tab -> **Activities** subtab.

Some activities will have subcategories called **Destinations**; for example, **Classroom** could be the primary activity, but you wouldn't see the forty-eight teachers you may have set as **Destinations** within that activity until you click on the **Classroom** button. When clicking on an activity has an (optional) **Destination**, instead of forwarding you to the next step (**Verify/Print Badge**), you will be directed to the **Destinations** subcategory.

Check the **Print Badge** box in order to print a staff badge at the end of the verification process. You can make badge printing enabled/disabled by default using the **Account/Facilities Vendor Preferences** tab. Whether the **Print Badge** option is enabled/disabled during **Sign In** depends upon the **Print Badge**



at Checkin setting in the individual Vendor record. The previous status of the **Print Badge at Checkin** option will be retained; meaning, if the **Print Badge** box was checked on the previous **Sign In**, then it will be checked the very next time that vendor signs in using the **Kiosk**.

Click the Go Back button to return to the **Select Person** step or **Start Over** to return to the main KeepnTrack **Kiosk** window.

Vendor: Verify/Print Badge

The verification message appears after selecting the activity. You will see the text "*Vendor has been signed in*" and the activity for which they were signed in on the main **Kiosk** window. At this point, your vendor is signed in and a barcode will automatically print (if your preferences are set to automatically print badges).

Vendor John Smith has been signed in for Sales Call.

Shown above is an example of the vendor name badge that will print. Name badges include the person identification number (and barcode), facility name, vendor name, activity name, classification name (in this case, vendor), and date and time of sign in.



KeepnTrack

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