Getting Started with KeepnTrack:
Manage Person Records

Let's take a look at how to manage your person records.

Manage Person Records

In Administration, Manage, go to the People subtab.

To add a record, click the add icon at the bottom left. Required fields are the name, at least one Classification, and at least one Facility.

Now this patron could sign in at either of these facilities, as Staff.

Other information you probably want are the Birthdate, and a Person ID. The Person ID will be assigned automatically, but you can enter a custom ID, or scan a KeepnTrack ID card to assign that card and ID to this patron.

Note that the Person ID becomes this person's unique identifier in KeepnTrack, and you will need this number in order to run imports that will update information for existing records.
You may want to assign these numbers from the numbers in your Student Information System, especially for Students and Staff.

See the Status is Active; you can change this manually at any time. You can also enter an Effective Date and/or Expiration Date, so that the patron will only be Active during that time, and after the Expiration Date their Status will automatically be set to Inactive.

Each Person is assigned to a Security Group; this governs their level of access to KeepnTrack. The default group is Person, which has no access to KeepnTrack other than the ability to sign in and out through the kiosk.

Under the Contact Info tab you can fill in their phone number and email and any other notes such as Medical Conditions.

Classifications lets you set particulars to the person type; in this case, she's Staff, so I could set a specific Staff Type (and these are set in your Account Preferences), a Hire Date, and a Staff ID.

If she were a Volunteer you could Set Preferred Activities, and for Students you can enter extra Student information as well as a list of people authorized to sign this student out.

Under Other you can fill in things like her Drivers License number, you can also give her a login and password so she can see her own information and activity, she will not however be able to edit anything but her History.

Save the record.

The gear at the top of each record lets you run Sex Offender Checks, view Quick Details or History reports for this person, import a picture, or delete the person record. You can also remove a record by selecting them in the list to the left and clicking the minus icon.

To search your person records, use the magnifying glass, and you can search by any of these general parameters, or expand the person type menus and search for specific, for example to bring up all students in Grade 8.

It's as easy as that.