

Getting Started with KeepnTrack: Manage Operators and Security Groups

Let's take a look at managing Operators in KeepnTrack.

What is an Operator?

Operators are people assigned a Security Group of Operator or higher—one that gives them access to more of KeepnTrack than simply signing in to the kiosk.

You as an administrator can specify which modules and areas of the program in particular each Security Group can access. For example, you could allow all those of 'Operator' level to run Reports and Exports, but limit Utilities and Imports—which change your data—to those at Administrator level or higher.

Add an Operator

Log in to KeepnTrack's Administration, and at the top you will see the areas you have access to. Click on Manage, and go to your People records.

You will add operators the same way as you add other people records; manually, with the plus icon, or through imports. Any person record requires the Name, at least one Classification, and at least one Facility.

Optional fields you probably want are the birthdate, and, under Other, a Login ID and Password.

When adding the login and password, be sure to make it something the operator will remember. This is especially important if this is an Account Administrator—the top level of access—as you do not want to be locked out of your Administration.

WARNING: If you do lose your Account level username and password, you will need to fill out a form and submit it to us for approval. For any other operator type, contact your Account Administrator.

NOTE: Do NOT contact KeepnTrack technical support to reset your password. Due to the secure nature of KeepnTrack, our technical support team cannot help you with editing your username and password.

Now you have a person record. To make this person an operator, back in Personal Info, click the Security Group drop-down, and change it to Operator...

...or one of the other levels. What do these Security Groups mean anyway? Let's go over that in the Security module.

Security

In Administration, under Manage, go to Operators, and Open Security.

There are 6 default Security Groups; Level 5 security is the lowest level, least powerful, for Visitors. Visitors have absolutely no security access. The Person level has only one box checked, for Person Status. This is for the actual people records in your system. Simple 'Visitors' do not have records and thus should not have any capabilities. Normal People, same thing.

Operator level, on the other hand, starts to get exciting. The default Operator settings are configured for a kiosk operator. People assigned this Security Group could log in only to the kiosk, and they could run Sex Offender Checks. That's all.

Administrator people get access to Administration, access to kiosks, they can view people History, Activity Management, Volunteer Application management, Workstation Management (printer preferences), and the Volunteer Verification module. They have *no* access to Preferences or Facility Management, and no access to this Security module. They can run Reports, Utilities, Exports, and Imports, and Sex Offender and Background Checks. They can view records of all these classifications of people.

So Administrators are fairly powerful. If you need lower-level administrators, you can modify this Security Group, or create your own. For example, you could restrict access to Student records if you don't want them seeing the student records, and uncheck permissions to run Utilities and Criminal Background Checks. This may be for someone you need to be able to

access Administration for basic tasks but you don't want them to have all this power.

Facility Administrator by default has all the permissions of an Administrator, plus they can access Facility Management, and Facility Preferences.

Account Administrator—anyone assigned this Security Group has access to ALL parts of the program. This can not be modified, and you must have at least one Account Administrator.

All people—Person, Operator, Administrator—*only* have access to the facilities checked in their Person record. So an Operator with access to only one facility will only be able sign in to the kiosk at that facility, and an Administrator with access to only one facility can only do administration tasks for that one facility.

Add Security Groups using the plus icon, or use the Actions menu (gear) at the top to add, duplicate, rename, or remove a group. Note you can not remove the default groups.

In your People records, you can find operators using the search, drop-down Security Info, and select the Security Group you are looking for.