Getting Started with KeepnTrack:
Running Utilities

Utilities in KeepnTrack allow you to modify multiple records at once. Let's take a look.

Running Utilities

Log in to your Administration, go to Tools, and open Utilities.

There are currently only 2 Categories of Utilities: People and History.

For any utility, you will click on the utility you want, and make **Selections** to narrow down what data you actually want to change. Note that when selecting by Classification, if you want a certain combination of classifications, for example all Students who are also Volunteers, you would check **Exact Classification Selection**, and check Students and check Volunteers.
If you check Students and Volunteer *without* checking the Exact Classification Selection, you will be changing all Students *and* all Volunteers.

After making your Selection, you choose Run Utility then check Operation Management for the results.

Types of Utilities

People utilities let you run a Batch Sex Offender Check, for example if you are not running automatic sex offender checks, or want to avoid doing it in the kiosk when the person signs in, you could run the batch one on all of your volunteers. The other utilities here let you Remove Person Pictures and Remove Person Records.

For example, if one of your facilities requires its volunteers to reapply each year, and you don't need any information from the old records, you could come into the Remove Person Records utility, choose the Facility, select the classification of Volunteer, and run the utility. You also probably want to

check that Exact Classification Selection to avoid removing your Staff people who also happen to be Volunteers.

Group Email lets you send a customized email to a select group of people.

History utilities let you Remove History Records. When you remove a person from KeepnTrack, their History goes with them. But if you want to keep Person Records but remove history records, use this utility.

Select the Remove History Records utility, make the appropriate Selections such as picking the facility, and run the utility.

Set Current Hours From is how you determine your 'Current Hours' count that shows in Person Management and Person Status. For example, if you calculate volunteer hours per semester, you could set the current hours for the start of the semester, and volunteers could see the hours they have accumulated this semester.
Note that Lifetime hours are never modified and can not be reset.

For any utility, once it finishes, go to Operation Management to view Information on the utility, such as how many records were removed.

If you have any questions or need assistance running utilities in KeepnTrack, please call KeepnTrack Customer Support at 1-800-320-5830.