What's New in KeepnTrack v3?

KeepnTrack version 3 (3.16.1) includes new interfaces, new functionality, better security, and the start of a new era.

Most changes are to the Administration side of KeepnTrack, but your operators may notice minor improvements to the Kiosks and Volunteer Application.

(Also, ask us about the Network Printer!)

Overview

The first thing you'll notice when logging in to KeepnTrack Administration in v3 is… the login itself. For better security and user experience, you will choose which facility you are logging in to.

Admin - About, Tools

The Administration About module has help links and information to orient new users, a form to email Customer Support, Account Information, and a quick link to supplies.

Navigate to Tools to access the various administration modules—for Person Management, click the People icon on the left.

Person Management

Quickly view important information about each person record, and assign Classifications under the Classification tab.

Use the Access tab to mark facilities this person can access, choose their security level, and give them a username and password to log in to Keepntrack as an operator or administrator—or to Person Status to view their hours.

From the Checks tab, Run Sex Offender and Background Checks and view Check history.

Notice that the person History tab is gone. You can still add history records through Person Management, from the Actions menu, but you'll go to the History module to view them.

Another thing you'll notice is the Lifetime Activities and Hours. KeepnTrack will now keep track of all of a person's hours, and number of activities, and this number won't get cleared. The 'Current' field above that shows hours and activities for the current period.

This means a volunteer knows all of their volunteer hours since they started, but volunteer coordinators can set ‘current’ periods to easily see hours from the past month, year, or so forth.

Also new for each classification—the Effective Dates range. This is essentially a way for you to set the date someone becomes ‘effective’, and/or the date they expire, *per* classification. So for example, if you have a student-volunteer, you could have her Volunteer classification expire at the end of the year, while her Student classification remains able to sign in, or vice versa.

We’ve also added a way for you to identify a Primary Phone so you know which number to call first, and a Printing option for people the Workstation Settings don’t apply to.

Volunteer Application Management

Let’s go to Tools now and open Volunteer Application Management. It’s essentially the same as Person Management, but has two bright buttons for you to Reject and Approve applications. You’ll also find the Search and Quick Search in both these modules have been enhanced.

Background Check

If you run Background Checks through KeepnTrack, you’ll be happy to know the window has been redesigned in a similar format to the Sex Offender window.

When you run a Background Check, and finish looking through the results, you have the option to mark that the person either Passed or Failed, with a note explaining why; OR, if you can’t make a decision right now, Defer to set the status to Needs Review and you can easily find those records later.

Message Center

Notice the little speech bubble icon at the top of Administration? That takes you to the Message Center, where we share with you important update information, tips, or maintenance announcements. This speech bubble icon also shows up in your Attended Kiosk, so your front office operators can also be notified of updates and maintenance.

History

Back in Tools, open History. Security enhancements to History ensure that if anyone changes a History record, KeepnTrack keeps track of that change. The record tells you at a glance if the record was created manually, and if it has been modified. When you change a record, make a note explaining why you made that change.

Notice that you can add History records through Person Management only, and you can remove history through utilities.

Transaction Start and End for each record are carved in stone when the record is created, but you can modify the Duration in order to award proper minutes to your volunteers (or other people).

Facilities

Facilities, now managed in their own module, are automatically added based on your licensed number, and when you remove a facility—after coordinating with us and reading carefully over the warnings—the record itself is kept until the following daily maintenance.

Preferences

Preferences have been cleaned up and reorganized.

Facility-based preferences are accessed through the top 3 buttons; the bottom 3 are all account-only preferences dealing with your volunteer settings.

Some preferences that were facility-based in version 2 are now account-based: your lists of Ethnicities, Staff Types, and Volunteer Types. And there are several new preferences as well!

The Volunteer Verification Procedure, which helps you run volunteers through a verification process before they become active in your system, can now be set to require a picture.

If you don't use volunteer applications, or aren't accepting applications right now, you can 'Turn off application and display the following note'.

In addition to a Kiosk Welcome Message and Kiosk Announcements, which differ per facility, you now have Account Announcements which will show at *all* of your facilities.

If you are in charge of multiple facilities, you can switch between your facilities using the facility icon at the top.

Also new… the Search box. No more wondering where a certain preference is—search for it!

We hope the new layout of Preferences, and the new interfaces and options throughout version 3, will be easy to get used to—and if you have any questions or feedback, contact Support at any time.
1.800.320.5830 or support@keepntrack.com

