

What's New in KeepnTrack 3.16.2?

KeepnTrack version 3.16.2 includes several new features, the biggest of which is... the Resolve Duplicates tool.

Resolve Duplicates

At last it's here—an easy way to identify duplicate person records *and* resolve them. If you use volunteer applications, this is going to be especially useful for you.

When a volunteer submits an application, it's automatically checked against existing volunteer application records, and any obvious duplicates are automatically merged. Next, when you open Volunteer Application Management, you will see these alert icons next to any record KeepnTrack thinks is a duplicate. Come up to the actions menu and choose Resolve Duplicates.

Now you have the record you selected on the left, with any possible duplicates on the right. [In this case there is only 1 duplicate.] The record on the left is the one you are identifying as the master record, to be updated and kept. The record on the right is the one you are identifying as the duplicate record, to merge—that is, to grab some information from—and then remove it.

Swap the records to get the correct record in its place. For the Keep record, none of the data will be removed or changed. If the Keep record is lacking information the duplicate record has, it will get that information.

Now when you Merge, you will be left with one application record for this person.

Now in Person Management, find that new application you've approved. When you click on it, you'll notice that icon telling you this is a duplicate. Again, from the actions menu, Resolve Duplicates... and you can go through the same process from here.

Notice there is a lot more information shown here to help you determine which record you want to keep.

The highest Security level, the oldest Person ID, and the newest application date will be retained, no matter which record it's from.

Sometimes you have a duplicate, but KeepnTrack doesn't realize it is a duplicate—this would happen if a name is spelled differently, or a nickname is used, or so forth. In this case, find that record you know has a duplicate, and choose Resolve Duplicates by ID. Because there aren't any duplicates that KeepnTrack has identified, it will ask you for a Person ID. Enter the person ID of the duplicate, and now you can resolve that duplicate.

The other thing that might happen is KeepnTrack thinks there is a duplicate, but you know they are actually 2 separate people. It doesn't harm anything to leave it that way, but if you want KeepnTrack to stop thinking it's a duplicate, you can. KeepnTrack won't identify a duplicate if the two records have different names, birthdates, Driver's Licenses, or Government IDs.

The Resolve Duplicates tool will help cut down on duplicate records that come from applications, imports, and people using different names in the kiosks to sign in as visitors.

For more on the Resolve Duplicates tool, see the Support Center, or call KeepnTrack Support at any time!

Panic Button

Don't panic! ..but there's a new Alert button in the Attended Kiosk. This is a quick way for the operator to call for help in case anything goes wrong. The alert will send to the alert numbers in your Preferences—all account alert phones and emails, and any alerts set up for your facility.

The alert text will include the facility name and the first name of the operator, so something like this:

E.g. "Washington High School - Myra has triggered an ALERT. Please check in at that location immediately."

Operator Alert

There's a new Operator Alert field in Person Management, under the Access tab.

Any message you enter in this field will show up for operators only—meaning only in an Attended Kiosk—whenever this person signs in or out. Remind operators to take a picture of the person, alert the operator that this person has allergies, or so forth.

Person Status

Have you seen the new Person Status? People can quickly see their personal information, as well as their hours and history. Remember, whether or not a person can add their own history is controlled by their Security Group.

Current Period

Starting in v3, KeepnTrack tracks the lifetime and Current hours of each person. 'Current' can mean whatever you need it to mean, and can be set for everyone, or on a classification-by-classification basis, via the utility Set

Current Hours From. The date you set here will be used to determine those Current hours. To reset the current period, run the utility for today's date. Note that although Lifetime hours are kept forever, Current hours are calculated from existing History records, so if you remove or add history records, the Current hours and activities will update accordingly.

Misc

Have you noticed the tab or window names in KeepnTrack? It should be much easier to keep track of what module you have opened where.

Those are the main changes for .2. See the complete Release Notes for more, or

Contact Support for questions or feedback!

1.800.320.5830 or support@keepntrack.com