BASIC TRAINING GUIDE

WWW.KEEPNTRACK.COM • 1.800.347.6439

TABLE OF CONTENTS

INTRODUCTION

The KeepnTrack Basic Training Guide contains material that supports the KeepnTrack Basic Training webinar. This guide is to be used as a reference tool to supplement the instruction provided by the KeepnTrack Training Coach and is not designed to provide further technical details.

The KeepnTrack Basic Training Guide communicates the basic understanding of KeepnTrack's primary functions, namely: **People, Tools, Kiosks, Applications,** and **Person Status**. Within each section, an overview of basic "how-to's" will be covered.

It is not the purpose of this document to act as a complete "Manual" or to replace the current "Support Center" resources available to all KeepnTrack customers.

For your convenience, links to the Support Center have been provided throughout this training document. Simply click a link for more complete details on that particular topic.

1 BEST PRACTICES

A. ENABLE SECURITY

The KeepnTrack program comes with security activated. Your local operators who will be in charge of KeepnTrack must be entered into the Person Management module. There, they should also be assigned to a Security Group that enables them to perform the appropriate functions within KeepnTrack that are necessary for the day-to-day operation of their work station. First, let's discuss setting the **Security Group** for your different types of operators.

To customize the permissions granted to a Security Group:

- Click the **Tools** module from the KeepnTrack Administration interface and click on **Security** in the Tools category.
- Don't forget to unlock a Security Group if you want to Edit by clicking the Lock icon at the top middle. If one of the default Security Groups does not meet your needs or you'd like an extra one, you can create your own custom Security Group by clicking the **Add (+)** button at the bottom left. There's no limit to how many you can have!
- Consider the options given and grant permissions as you need for operators assigned to the chosen security group.
- When finished, click on **Save** in the upper-right corner of the window.

To add an operator:

Now that you have reviewed your Security Groups, you will want to apply them to operators. To do so:

- Click on the **People** module from the KeepnTrack **Administration** interface.
- Click on **Add (+)** at the bottom of the left frame if you are adding the person. If the person is already in the system, search for them using the **Find** icon .
- After adding the Personal Information or Finding the existing person's information, you will click on the Access Tab to set up their Facility, Security Group, and Login Credentials (username and password).
- Click on **Save.**

HELP & SUPPORT

2 SUPPORT CENTER

KeepnTrack provides built in **Help** documents. These can be accessed in either of two ways.

In the upper right corner of each KeepnTrack module you will see the **Help** icon . Clicking this icon will open the help document associated with that window in the **KeepnTrack Support Center** website. The second method is to serach for help documents in the Support Center.

To view the Support Center:

Go to http://www.keepntrack.com/supportcenter/index.php/Main_page

3 MESSAGE CENTER

KeepnTrack's **Message Center** allows you to receive notifications from COMPanion. These notifications contain update notices or information from COMPanion or COMPanion-sanctioned third parties and will vary depending on what features you are licensed to use. The **Message Center** comprises a single list, with COMPanion messages shown first.

To view the Message Center:

Click on the Message Center ( ) icon to open the Message Center and display a list of your notifications; when you have unread notifications or new messages are available, a red dot ( ) appears on the Message Center icon ( ).

HELP & SUPPORT

4 TIPS & TRICKS

Tips & Tricks features new tips for using KeepnTrack. You may sign up to receive them via email to help you run KeepnTrack more smoothly.

To receive the **Tips & Tricks** emails:

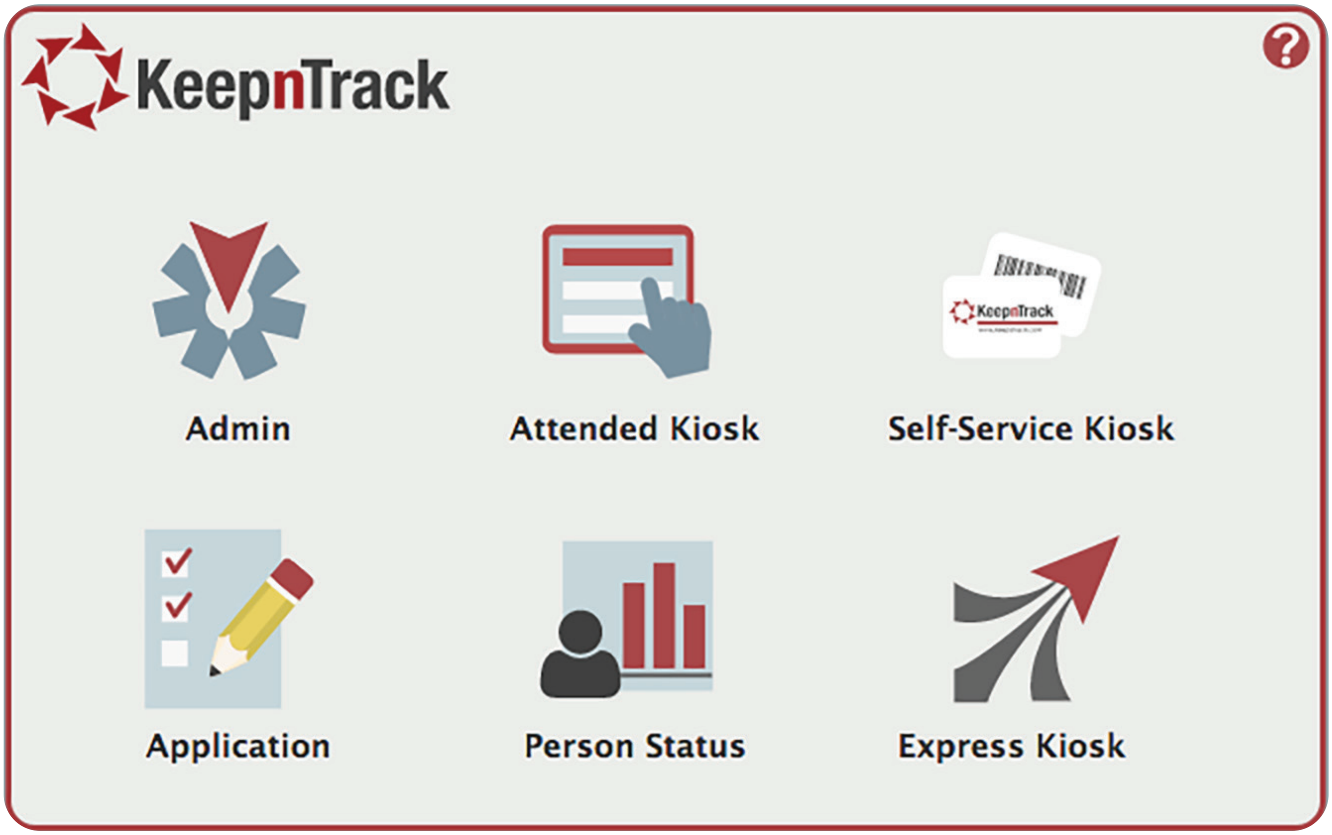
- Go to KeepnTrack's website http://www.keepntrack.com and click on **Contact** at the top of the web page.
- Fill in the form for the **Newsletter.**

5 24/7 CUSTOMER SUPPORT

As long as your site's KeepnTrack Software Subscription is current, anytime you have a problem or a question, you have access to COMPanion's Customer Support Team. You may call Customer Support 24/7 at **1-800-347-4942** (1-801-943-7277 for international customers) or email **support@keepntrack.com**.

During the busy time of the year (beginning of school, beginning of the calendar year, and inventory season), you may be asked to leave a voice message. Customer Support will contact you as soon as they are available.

APPLICATION PICKER



To learn more about logging in to KeepnTrack, click below.

Learn More!

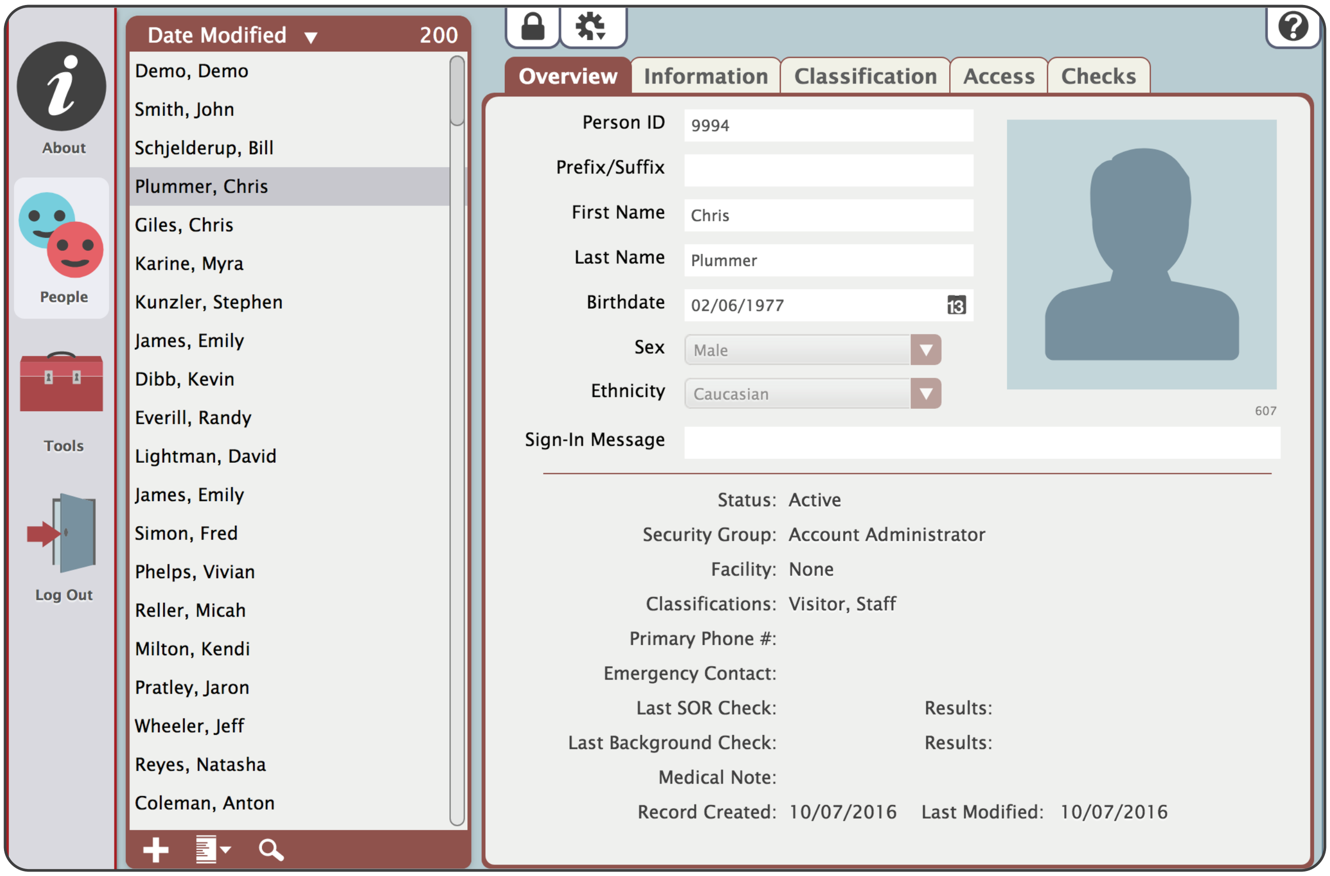
ADMINISTRATION

While the **Kiosks** are the front-end of the KeepnTrack system that the majority of your users interact with directly, **Administration** is the back-end, which contains all of the preferences and settings, reports, and the ability to set up the workflow for the **Kiosk** interfaces. Very few of your KeepnTrack operators will have access to this section. For more information about **Logging In** to **Administration**, go here:

Learn More!

ADMINISTRATION

1 PEOPLE



Person Management allows an Operator to add People, edit History, and update information. The left side is a list of people. The right shows the information associated with the person currently selected on the left. On the right there are tabs for: Overview, Information, Classification, Access, and Checks. Above the tabs are the control features Lock/Unlock ( ), Actions ( ), Revert, Save, and Help ( ). Below the People list on the left you'll find the Add ( ), Quick Search ( ), and Search ( ) features.

ADMINISTRATION

1 PEOPLE

A. ADDING PERSON RECORDS MANUALLY (SEE SECTION 2 FOR IMPORTING)

To add a new person record:

- Click on the **People** button on the left hand side of the Admin Module
- To add a new person click on the **Add** (➕) button near the bottom left hand corner of the window.
- Use the **Overview** and **Information** tabs to input the individual's personal information. **First Name, Last Name**, and **Birthdate** are the only required fields when adding in personal information.
- The **Classifications** tab is where you will specify what type of visitor the individual is. By default all people will be given a **Visitor** classification; the additional classifications are there to give extra control over your visitors and their access needs.
- If the person you are adding will be an operator, use the **Access** tab to set up their level of access, personalized login credentials, and facility designations.
- Use the **Checks** tab to perform the Sex Offender Registry (SOR) check and Criminal Background Check (CBC) on the person you are adding. By default only the SOR check will be performed; the CBC check requires tokens with an additional cost. Please contact COMPanion's **Sales Department** at 1-800-347-6439 or email us at *sales@companioncorp.com* to find out how to purchase tokens.
- Once you have all the information put in and the checks performed, click **Save** to finalize the record or **Revert** to clear all the changes and start over. These buttons are located in the near the top right corner.

1 PEOPLE

B. MODIFYING PERSON RECORDS

To modify a person record:

- Click on **People** from the Navigation Bar.
- Click the **Find** ( ) at the bottom of the left pane. The **People Lookup** will open.
- Type in the **Person's** last name or any pertinent field and press **<enter>.** Then select the desired person from the list in the left pane.
- Unlock the person's record by clicking on the **Lock** icon.
- Make changes to the person's record and click on the **Save** button.
- **Important:** If you have access to more than one facility, especially if you have **Account Admin Operator** rights, make sure to select **ANY** under the **Facility** drop-down when you perform a search for a specific person.

C. ADDING AND VIEWING PERSON HISTORY

To manage a person's history:

- Click on **People** from the left of the Admin window.
- Click the **Find** ( ) at the bottom of the left pane. The **Person Lookup** will open.
- Type in the **Person's** last name or any pertinent field and press **<enter>.** Then select the desired person from the list in the left pane.
- Click on the Actions Menu ( ) icon and select the **View** or **Add Person History** option. **View** will download a PDF. To add **History**, enter the pertinent information.
- To make any changes to the selected person's **History**, use History Management.

ADMINISTRATION

1 PEOPLE

D. REMOVING A PERSON

To remove a person record:

- Click on **People** from the left of the Admin window.
- Click the **Find** ( ) at the bottom of the left pane. The **Patron Lookup** will open.
- Type in the **Person's** last name or any pertinent field and press **<enter>.** Then select the desired person from the list in the left pane.
- Click on the **Actions Menu** ( ) icon and select the **Remove Person** option from the pull down list.

2 TOOLS

KeepnTrack **Tools** is a convenient assembly of commonly-used features and tools for the KeepnTrack Operator. Each tool interface is also accessible by adding slash (/) and the name of the tool to the end of your KeepnTrack URL. An example would be Reports. To quickly access Reports add "**/reports**" to your Keepntrack URL, e.g. *demo.keepntrack.com/reports*

Click here to learn more about KeepnTrack Tools

Learn More!

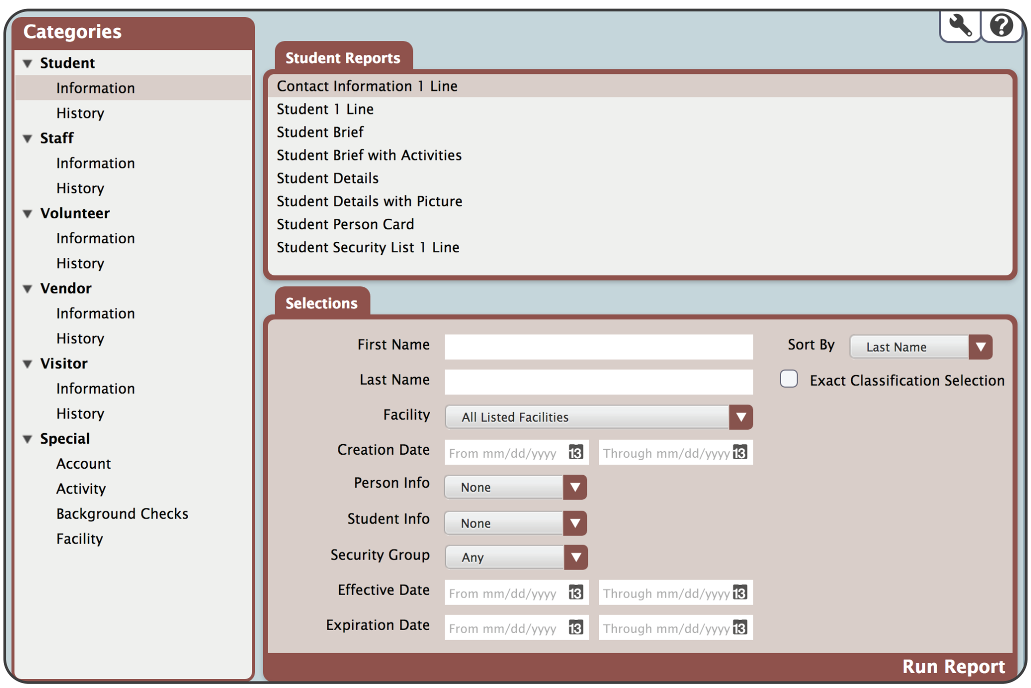
ADMINISTRATION

2 TOOLS

A. TOOLS CATEGORIES

REPORTS

- Used to generate a number of different layouts of the information you need on a regular basis.



UTILITIES

- A few ways to mass manipulate your data.

VOLUNTEER VERIFICATION

- The last step in verifying new applicants. Also gives you the option to snap their photo and assign them a unique person ID and even an ID card if it suits your chosen process.

ADMINISTRATION

2 TOOLS

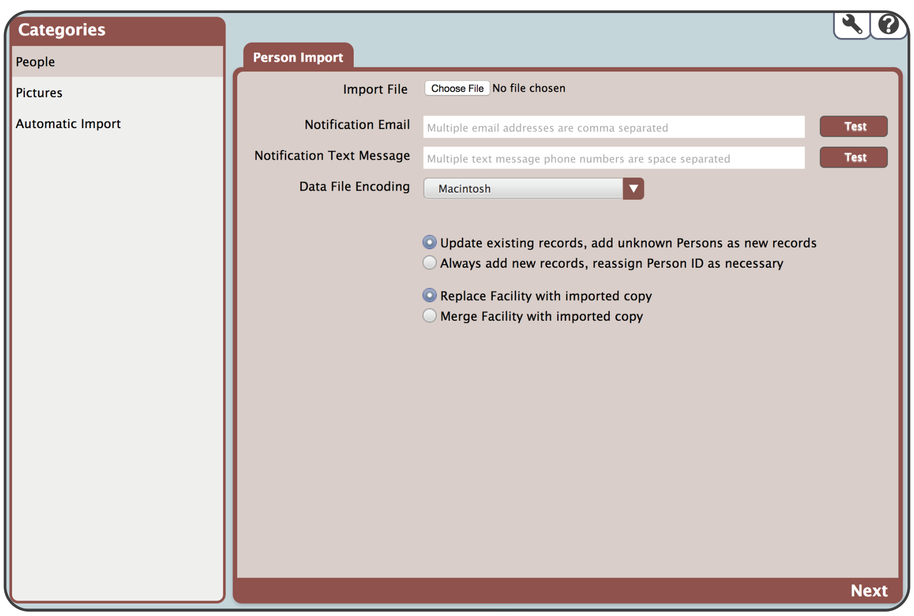
A. TOOLS CATEGORIES

EXPORT

- Offers the ability to generate raw data person lists or history records in a text tab-delimited format. This format can easily be transferred to Excel, CSV, and other formats.

IMPORT

- Using imports you have the ability to enter upload files of your various people information, such as student files from you SIS (Student Information System), Volunteer info that you might have in an Excel file, or Staff lists. These imports can be done manually or set up to automatically run each night. The import file must be in a tab-delimited format to be recognized by KeepnTrack.



APPLICATION PICKER

- A quick link to the landing page you see when you first load your KeepnTrack URL.

ADMINISTRATION

2 TOOLS

A. TOOLS CATEGORIES

PREFERENCES

- It is important for the main KeepnTrack administrator for your group, the administrative committee, or a technician to go through the **Preferences** to ensure they are set up as needed. Luckily, there aren't very many.

SECURITY

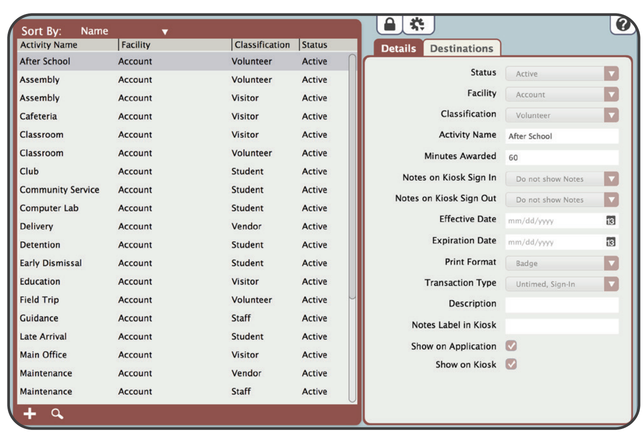
- A customizable breakdown of security levels and granular capabilities.

B. MANAGEMENT CATEGORIES

ACTIVITIES

- Other than **People**, **Activities** are one of the two main building blocks of setting up and using KeepnTrack. The names of **Activities** plus their corresponding **Destinations** show up on badges that are printed, are saved in **History**, and will reflect on reports. Make sure to spend some time here carefully setting up the **Activity** names you like!

- **Important:** If you have multiple facilities in KeepnTrack, we STRONGLY suggest setting all of your activities' **Facility** fields to a specific facility instead of using **Account**. This can avoid a lot of confusion in the long run.



ADMINISTRATION

2 TOOLS

B. MANAGEMENT CATEGORIES

VOLUNTEER APPLICATIONS

- Once your Volunteers have filled out and submitted their applications, your Volunteer Coordinator can come here to process, **Approve**, or **Reject** them.

FACILITIES

- This is where all of your Facilities and their individual unique information can be entered. Including logos!

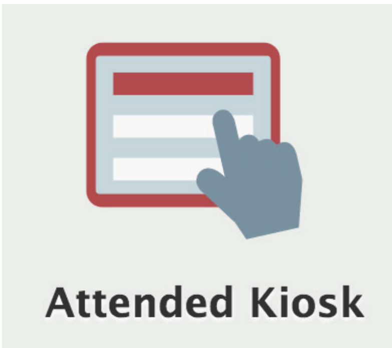
HISTORY

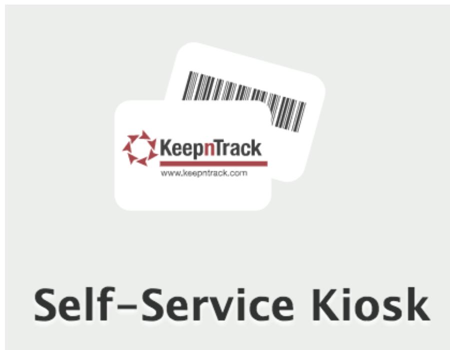
- An interface that allows you to view, search, and edit history records.

OPERATIONS

- An open queue of completed and running **Reports, Exports,** and **Utilities**. You can also view previously ran functions from previous days

KIOSKS





KeepnTrack's Kiosks are what the majority of your users—volunteers, students, staff, vendors, and visitors—will interact with; they are used to sign people of all classification types in and out of your facilities. It is imperative that your **Activities** are set up before the kiosks can be used. Kiosks differs greatly from the Administrative module, which is used to change settings, approve applications, and perform sex offender and criminal background checks.

Click here to learn more about KeepnTrack Kiosks.

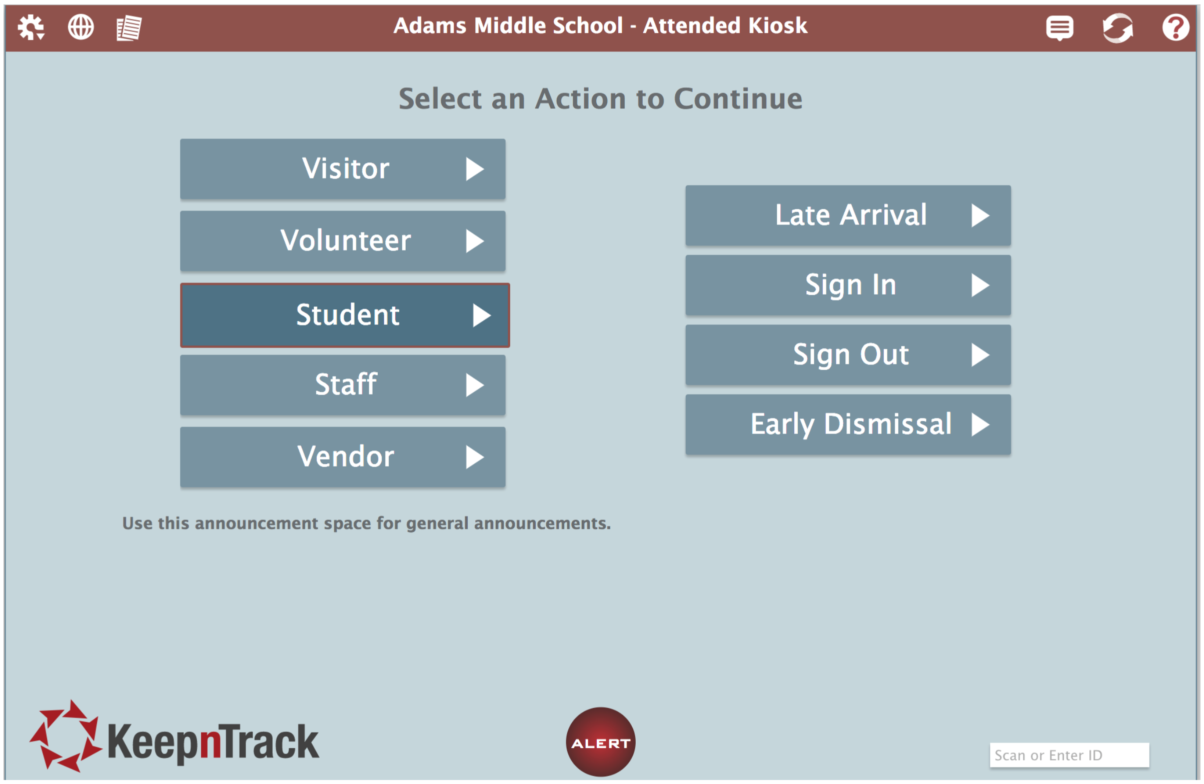
Learn More!

KeepnTrack's Kiosks consist of the following interfaces:

- **Attended Kiosk** (myfacility.keepntrack.com/kiosk)
- **Self-Service Kiosk** (myfacility.keepntrack.com/selfservice)
- **Express Kiosk** (myfacility.keepntrack.com/express)

KIOSKS

1 ATTENDED KIOSK



The Attended Kiosk interface is used by operators to sign the people who use your facility in and out. It is considered the more secure kiosk option as it requires an attendee to manage it. It is NOT intended to be used directly by the general public (Self-Service Kiosks are intended for the general public to personally use). This Kiosk also features Quick Reports and will show possible offender match details, whereas the Self-Service Kiosk does not show these two things. There are five default classifications: **Visitor, Volunteer, Student, Staff,** and **Vendor**. This list can be customized and specific classifications disabled in the Workstation Management settings. The Attended Kiosk will remain active until manually logged out. Again, attended Kiosks are recommended for use when utmost security is essential.

Learn More!

KIOSKS

1 ATTENDED KIOSK

A. GENERAL SIGN IN

- The kiosk can switch between Spanish and English if it is needed for your office attendants behind the desk. This can be done using the globe button at the top left of the screen.
- First, select the **Classification** of the person standing in front of you with which they would like to sign in.
- Second, choose **Sign In**, or **Sign Out** depending on what they are doing; i.e. which **Activity** needs to be specified. For example: to sign a student out of school early you would choose **Student** and the **Sign Out**, as the **Activities** that would be used to sign the student out are located under the **Sign Out** activities.
- Third, enter the person's information by either scanning the ID, or manually entering the Person's ID by typing in the required **Name** and **Birthdate** information.
- Finally, select the **Activity** that the person is performing. After clicking on this button the workstation will either immediately print your badge if that has been set up, or it may ask for notes or a destination before printing the badge for you if those options have been set up.

B. GENERAL SIGN OUT

Not all **Activities** need to be **Signed Out**. Some are one-time performance and are called **Untimed Activities**, such as when a student signs out of school for the day. If the activity is timed or needs to be signed out of, follow the steps below.

- The first way to **Sign Out** an individual person is by repeating the **Sign In** steps, just simply select the Sign Out button at the appropriate step.
- You can also **Sign Out** an individual by scanning the barcode on their ID into the **Command Field** in the bottom right corner of the screen. You can also scan into this same **Command Line** the barcode located on the temporary sticker badge which was printed for them at the time of sign in.

KIOSKS

1 ATTENDED KIOSK

C. DENIED ACCESS SIGN IN

- Sometimes a person may try to sign in/out who has already been set to an **Access Denied** status. Such as when a parent has a custody concern. When there is an attempt to sign that individual into the **Attended Kiosk** they will be flagged with a denied access message. You will see that it is a quiet and private message seen only by the attendant behind the desk. It pops up to let the attendant know that there is possible matching information for this person based on their name and birthdate. It is important to discuss how this process should play out during the roll-out stage of KeepnTrack. Your office and staff should feel comfortable managing such individuals. If they ARE a match then it could be a sensitive situation that needs extra attention at the time of attempted sign-in.
- These **Denied Access** individuals must be signed in through an **Attended Kiosk**. If the **Denied Access** individual attempts to **Sign In** to a **Self-Service Kiosk** it will provide them with the message that they are not allowed to sign in at the time and that they must refer to a member of the office staff. This process helps school staff to manage the flow of security concerning individuals and allow them to personally confirm or reject the **Denied Access** individual as being a possible match.

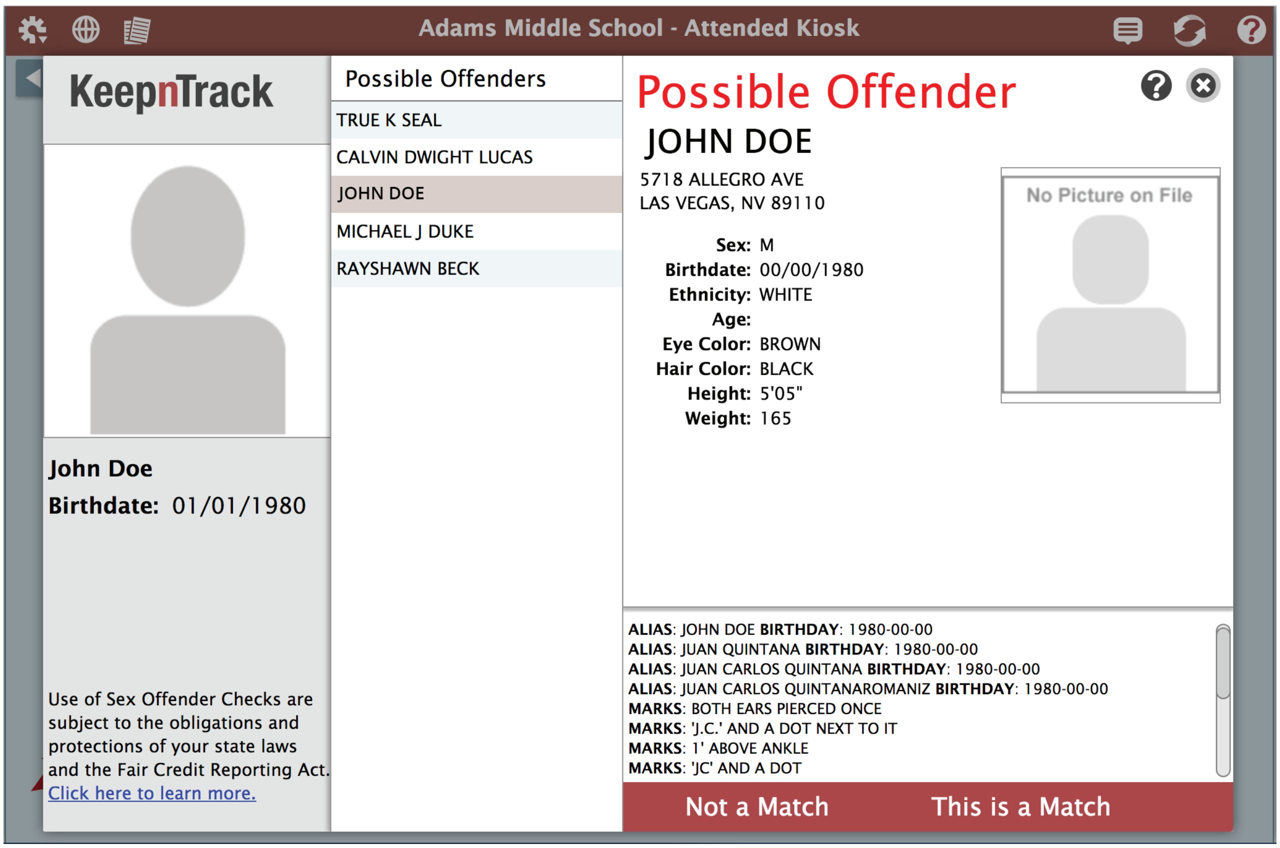
D. POSSIBLE OFFENDER SIGN IN

If a possible sex offender match tries to sign through you will go through a process similar to the above detailed **Denied Access Sign In** process. In the case of the possible offender attempting sign in, a window will pop up with actual displayed possible matches that the attendant must process one by one. The goal is to identify that the person standing in front of the attendant is either a match or not a match. Your group or facility should practice this process beforehand and should have a thorough script and plan for processing these sensitive situations

KIOSKS

1 ATTENDED KIOSK

D. POSSIBLE OFFENDER SIGN IN



- Preferences can be set up to send out an email and/or text alert to a group of individuals at various moments throughout the sensitive, possible offender attempted sign-in process.
- These **Possible Offender** individuals must be signed in through an **Attended Kiosk**. If the **Possible Offender** individual attempts to **Sign In** to a Self Service Kiosk it will provide them with the message that they are not allowed to sign in at the time and that they must refer to a member of the office staff. This process helps school staff to manage the flow of security concerning individuals and allow them to personally confirm or reject the **Possible Offender** individual as being a possible match.

KIOSKS

1 ATTENDED KIOSK

E. POSSIBLE OFFENDER SIGN IN

- Using the **Command Line** at the bottom right allows you to do this in a much quicker fashion. Simply scan their unique **Person ID** into that **Command Line**. Their unique **Person ID** number can also be scanned into the First Name field under the **Sign In** or **Sign Out** manual fields.

F. QUICK REPORTS

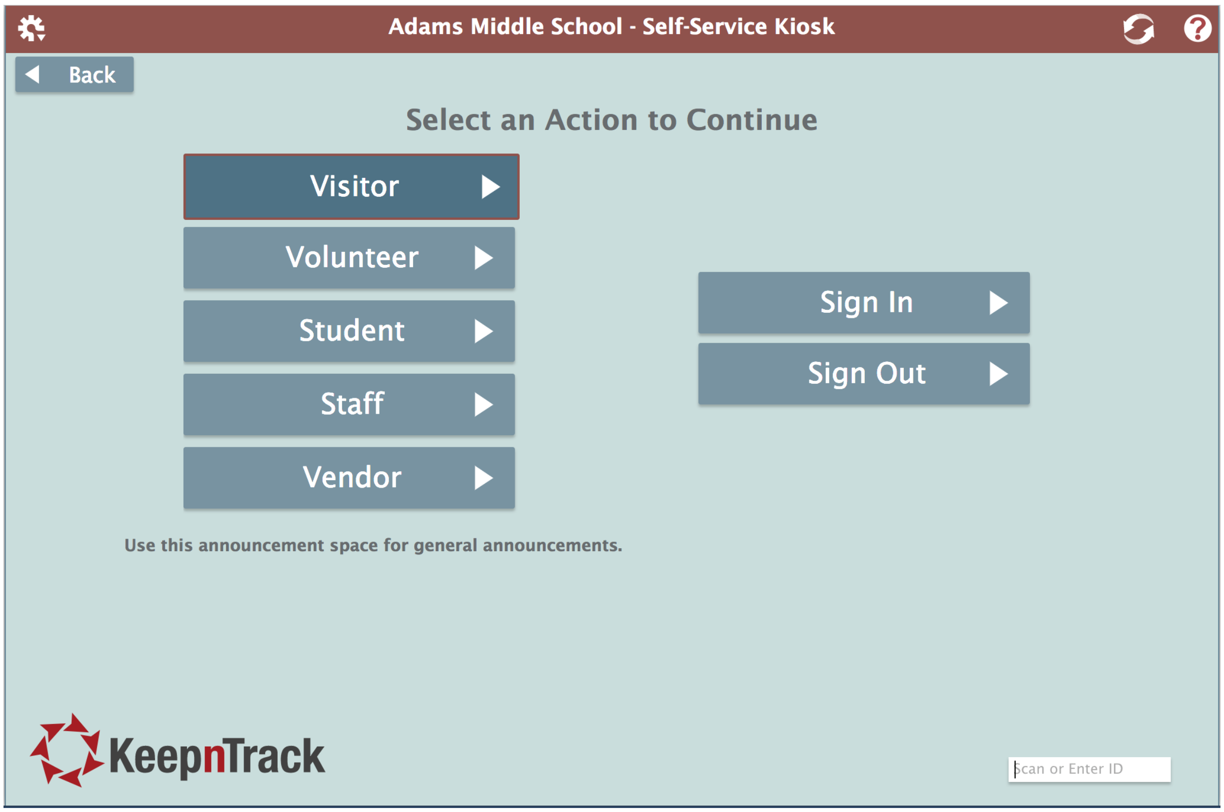
- These can be accessed by clicking the **Quick Reports** icon at the top left of the Attended Kiosk.

2 SELF-SERVICE KIOSK

The **Self-Service Kiosk** is designed to be used by the general public, be they a first time or returning user. Due to its unattended nature it is considered to be a less secure station. However, people that are flagged as **Denied Access** or a **POSSIBLE** (not necessarily an actual) **Offender Match** will need to be processed by an attendant at an Attended Kiosk.

Learn More!

2 SELF-SERVICE KIOSK



A. SIGN IN

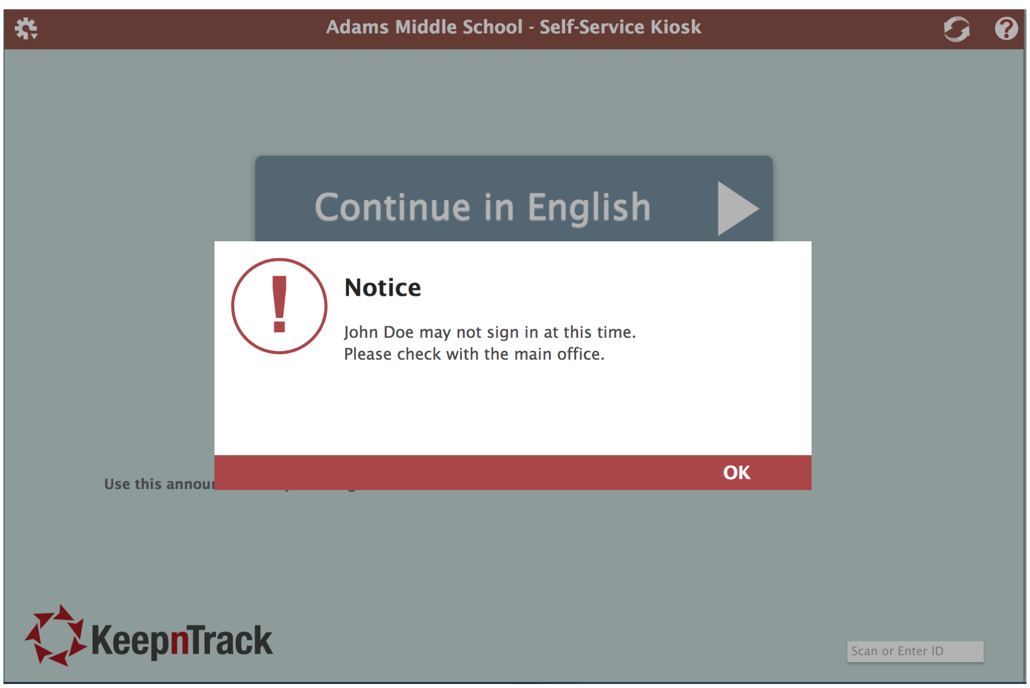
- First the Person will select the **Language** (if it's set up) and **Classification** they would like to sign in with.
- After clicking the **Sign In** button either scan your ID, enter your **Person ID**, or type in the required Name and Birthdate information.
- Finally, select the **Activity** that you would like to **Sign In** with. After clicking on this button the workstation will either immediately print your badge or ask for notes before printing the badge for you.

2 SELF-SERVICE KIOSK

B. SIGN OUT

- The first way an individual person can **Sign Out** is by repeating the **Sign In** steps, just simply select the **Sign Out** button at the appropriate step.
- You can also **Sign Out** by scanning the barcode on their ID into the **Command Field** in the bottom right corner of the language selection screen.

C. DENIED ACCESS OR POSSIBLE OFFENDER MATCH MESSAGES

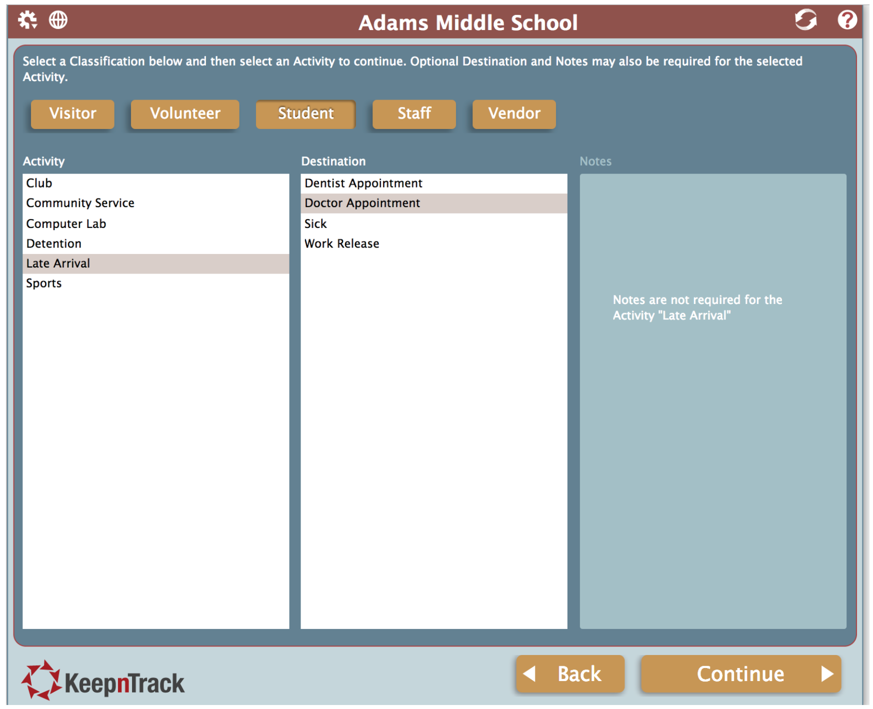


- When a person is checking in through a **Self-Service Kiosk** they may be flagged with a “may not sign in at this time” message. This can happen for a number of reasons (status, possible sex offender matches, effective dates).
- For these individuals they will need to be signed in through an **Attended Kiosk** so that school staff can confirm or reject any possible matches.

KIOSKS

3 EXPRESS KIOSK

The **Express Kiosk** module allows you to quickly sign multiple people in for a single activity. This does require that the **Visitors/Attendees** are already created in the **Person** portion of Keep-nTrack. Meaning, if this is their first visit to the facility they will be required to check-in through an **Attended** or **Self-Service Kiosk**.



A. SETTING UP THE EXPRESS KIOSK

- Open to your KeepnTrack main page and click on the **Express Kiosk Button**.
- Once you have signed in and selected your facility, you will then select the type of **Express Kiosk** you would like to set up (**Sign In, Sign Out**, or **Timed Sign Out**).
- After selecting the type, you will then set up the **Visitor Classification** and **Activity** that the Kiosk will be used for.
- Depending on if you set up the **Sign In** type for timed or untimed, you may or may not need to set up an **Express Sign Out Kiosk** after the activity.

Learn More!

KIOSKS

4 WORKSTATION MANAGEMENT

The **Workstation Management** window can be accessed under the gear at top left of each Kiosk. It provides you with an easy way to set up your station, and configure, test, and support the printers, scanners, and other peripherals used with your KeepnTrack software. Information about your current hardware and software configuration can be found in the **Information** section. For any questions, call the KeepnTrack Customer Support number ***(800) 320-5830*** or email **support@keepntrack.com**.

Learn More!

KIOSKS

4 WORKSTATION MANAGEMENT

Once your **Workstation Management** settings have been saved, you will not need to set these again unless the station's default internet browser has its *cookies* deleted. This can happen through routine maintenance, security settings, or a computer restart. If this does occur, your **Workstation Management** settings will be reset to default.

To set up Workstation Management and Hardware:

- First log into the Kiosk of your choice and click on the **Action Menu** near the top left hand corner, and from the menu select **Workstation Management**.
- To set up the types of **Sign Ins** allowed, click on the **Station** icon on the left, then use the checkboxes for the correct **Classification** types, and the **Dropdowns** for the **Print Type**.
- Use the **Printers** area to identify the printer to be used, install the print drivers, and designate the type of material to be printed (Badges or Slips).
- The **Scanners & Cameras** area is where you will go to confirm your scanner is connected and reading correctly. You will also set up any web cams for taking pictures from this location.
- Once you have adjusted all the settings for your needs, you will click the **Return to Kiosk** button located in the top left corner.

APPLICATION

Online **Volunteer Applications** are a customizable way for you to allow your volunteers to submit to you their personal information for pre-approval into your facilities. Please take the time to view the customization options located under ***Preferences*** > then both the ***Volunteer Approval*** AND ***Volunteer Applications*** areas.

Learn More!

APPLICATION

1 FINDING THE APPLICATION

- The application is located at the facility or district's unique KeepnTrack URL, with a slash and "apply" at the end. For example: **demo.keepntrack.com/apply**
- The above-mentioned URL can be set up on a facility website as a link, offered to the Volunteers/Users in an email, included on paper documentation, etc.

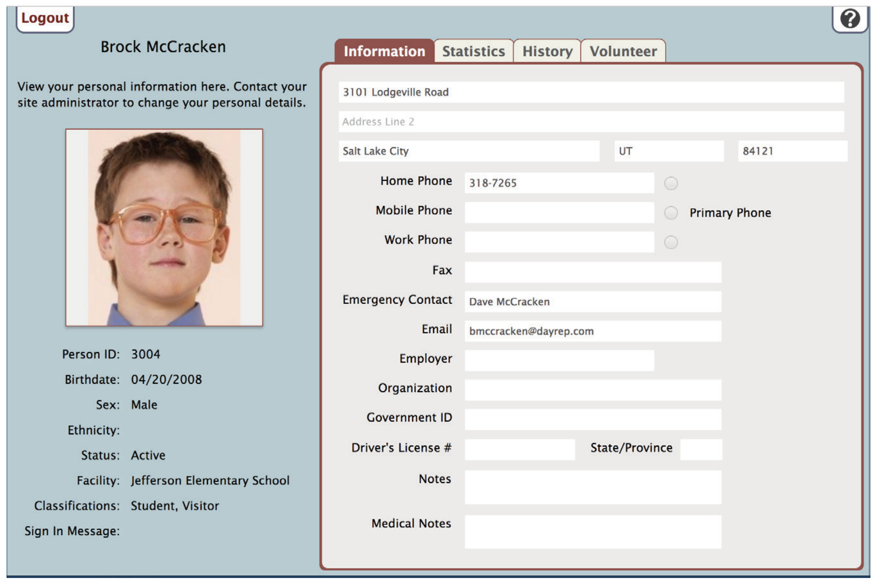
2 APPROVING THE APPLICATION

The management interface to process applications is located under ***Tools*** > ***Volunteer Applications***. Or, it can be accessed by going to the facility specific URL with a slash "volunteers" at the end. For example: **demo.keepntrack.com/volunteers**

- First, once in the **Volunteer Applications** screen it must be unlocked.
- Second, depending on your group's work habit or pre-ordained volunteer approval processes, the application should be analyzed as to whether it is worthy of approval, must wait as an application for deeper consideration, or must be rejected.
- If the **Approve** button is chosen, the **Application** will leave the **Volunteer Applications** list and be viewable under the **Person Management** interface.
- If the **Reject** button is chosen the **Application** will stay in the **Volunteer Applications** list but will only be viewable using the magnifying glass at the bottom left and the **Search Status** option of **Rejected Applications**.

PERSON STATUS

The **Person Status** window allows your Volunteers/Users to log in and view their personal information and current history. And, if needed, a preference is also offered that can allow your Volunteers/Users to add their own history records. This preference is located under ***Tools*** > ***Security*** > then setup specific to the **Security Group**



1 LOGIN

To log in:

- First, you Volunteers/Users must be given a username and password.
    - This can be imported en masse, requested to be entered by the Volunteers/users themselves at the time of applying, or entered manually in their person record.
- Second, your Volunteers/Users must go to the facility URL with a slash "status" at the end and using the username and password provided, complete their login. For example: **demo.keepntrack.com/status**
    - This URL can be set up on a facility website as a link, offered to the Volunteers/Users in an email, included on paper documentation, etc.

Learn More!

Enjoy KeepnTrack!

For more information, contact KeepnTrack Customer Support. As long as your site's Software Subscription is current, anytime you have a problem or a question, you have access to COMPanion's Customer Support Team. Call Customer Support 24/7 at 1-800-347-4942 or email support@keepntrack.com.