



KeepnTrack[®]

BASIC TRAINING GUIDE



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INTRODUCTION

This KeepnTrack Basic Training Guide contains material that supports the KeepnTrack Basic Training Video Series. 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.

HELP & SUPPORT

1 Best Practices

ENABLE SECURITY

The KeepnTrack program comes with security activated. Your local operators who will be in charge of KeepnTrack must be entered into the **People 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 workstation. First, let's discuss setting the Security Group for your different types of operators.

To customize the permissions granted to a Security Group:

1. Click the **Tools** module from the KeepnTrack Administration interface and click on **Security** in the **Tools** category.
2. Unlock the Security Group you want to edit by clicking the lock icon at the top middle. If one of the default Security Groups doesn't meet your needs or you'd like an extra one, you can create your own by clicking the **Add +** button at the bottom left. There's no limit to how many you can have!
3. Consider the options given and grant permissions as you need for operators assigned to the chosen Security Group.
4. When finished, click **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.

1. Click on the **People** module from the **Administration** interface.
2. 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 **Search** 🔍.
3. After adding personal information or finding the existing person's information, click on the **Access** tab to set up their **Facility**, **Security Group**, and **Login Credentials** (username and password).
4. Click **Save**.

2 Support Center



KeepnTrack provides built-in help documents. These can be accessed two ways:

1. 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.
2. The second method is to simply search for help documents in the **Support Center**.

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 green dot appears on the Message Center icon .



Sign up for our newsletter to receive school safety tips, volunteer management resources, inspirational blog posts, educational trends, and more!

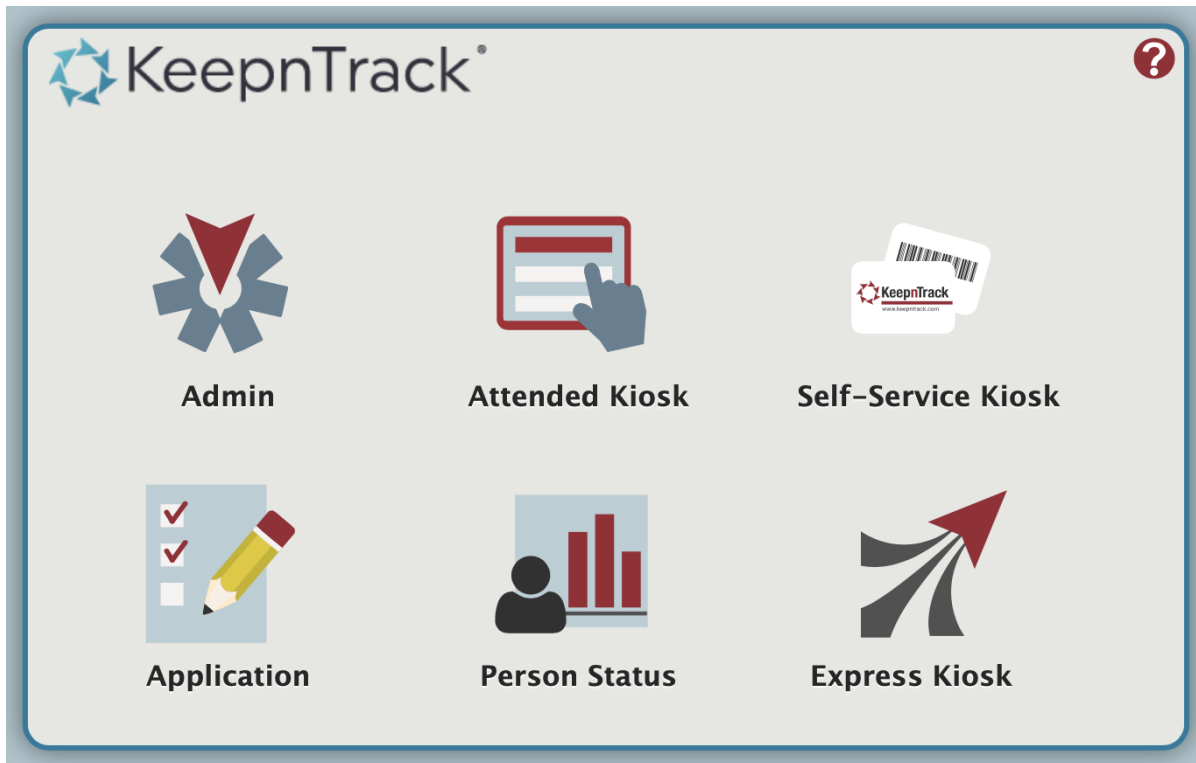
4 24/7 Customer Support

As long as your site's KeepnTrack Software Subscription is current, you have access to COMPanion's Customer Support Team anytime you have a problem or a question. You may call Customer Support 24/7 at **(800) 320-5830** or email support@keepntrack.com. (International: 1-801-943-7277).

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

APPLICATION PICKER

When you [log into KeepnTrack](#), you will find the Application Picker. This is the default landing page from which you can choose the program area you'd like to open.



The rest of the guide will explore these six areas of KeepnTrack:

1. [Admin](#)
2. [Kiosks](#)
 - a. [Attended Kiosk](#)
 - b. [Self-Service Kiosk](#)
 - c. [Express Kiosk](#)
3. [Application](#)
4. [Person Status](#)

ADMINISTRATION

About

People

Tools

Log Out

Overview Help Status Supplies Demo Demo is logged in at Adams Middle School, [LOG OUT](#)

KeepnTrack®

Welcome to KeepnTrack Administration, v3.18.8

New to KeepnTrack or Need Help? Select the Help tab above and access the [Getting Started Guide](#) in the [Support Center](#).

People: Manage your People and Operators, run sex-offender/background checks, add pictures, and manage Operator permissions. Read more about [People](#) in the Support Center.

Tools: Access the following Administration modules:

- **Reports:** Compile data and generate reports on information contained in your KeepnTrack system.
- **Utilities:** Perform mass data manipulation of Person and History records.
- **Import or Export:** For adding person records from a file, and saving records to a file.
- **Preferences:** Manage Account and Facility information and settings for your KeepnTrack system.
- **Security:** Manage the security access levels of your administrators.
- **Volunteer Verification:** Used to gather additional information about volunteers whose applications have been approved.
- **Activity Management:** Manage the Activities available at your facility.
- **Volunteer Applications:** Approve or deny Volunteer applications.
- **History Management:** View historical activity information.
- **Facility Management:** Manage the facilities of your account.
- **Operation Management:** View completed reports, utilities, imports, and exports.

Application Picker:








- **Attended Kiosk:** For operators/administrators to sign people in or out.
- **Express Kiosk:** Express lets operators/administrators quickly sign in multiple people to a single activity.
- **Self-Service Kiosk:** Self-Service allows people to sign themselves in to your facility.
- **Person Status:** Allows people to check their information and history.

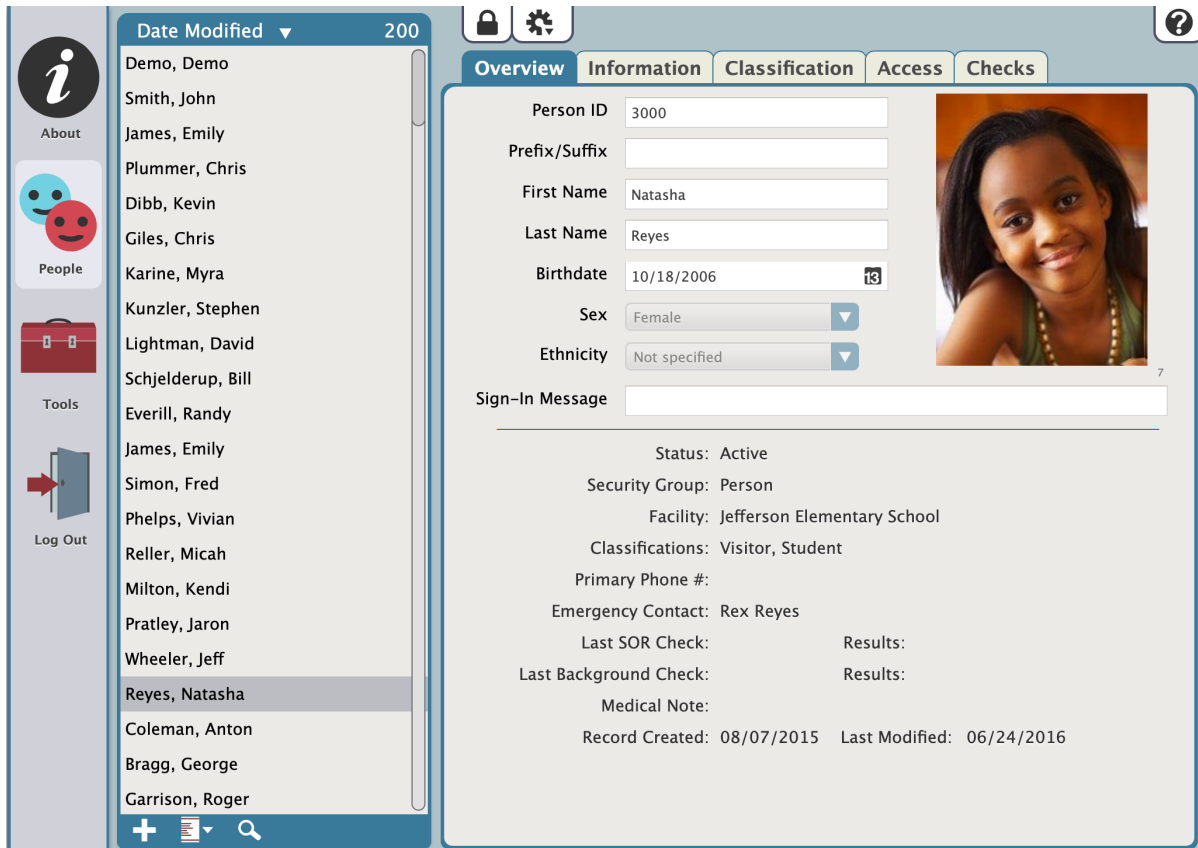
Access your account's Volunteer Application at <https://demo.keepntrack.com/apply>

[LOG OUT](#) when you are finished using KeepnTrack to secure your private information.

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.

1 People

People Management allows an operator to add people records, add 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.



ADDING PERSON RECORDS MANUALLY

To add a new person record:


1. Click on **People** from the left of the **Admin** window.
2. To add a new person, click on the **Add +** button near the bottom left hand corner of the window.
3. 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.
4. 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.
5. 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.
6. 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.
7. 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 near the top right corner.



You can also [import person data](#).

MODIFYING PERSON RECORDS

To modify a person record:



1. Click on **People** from the left of the **Admin** window.
2. Click **Find**  at the bottom of the left pane. The **People Lookup** window will open.
3. 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.
4. Unlock 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.



ADDING AND VIEWING PERSON HISTORY

To manage a person's history:

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

REMOVING A PERSON

To remove a person record:

1. Click on **People** from the left of the **Admin** window
2. Click **Find**  at the bottom of the left pane. The **Patron Lookup** window will open.
3. Type in the person's last name or any other pertinent field and press **<enter>**. Then select the desired person from the list in the left pane.
4. Click on the **Actions Menu**  icon and select the **Remove Person** option from the dropdown menu.

2 Tools

KeepnTrack **Tools** is a convenient assembly of commonly-used features and tools for operators. 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. myfacility.keepntrack.com/reports).

TOOLS CATEGORIES

Reports

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

The screenshot displays the KeepnTrack Reports interface. On the left is a sidebar menu titled "Categories" with the following items: Student (Information, History), Staff (Information, History), Volunteer (Information, History), Vendor (Information, History), Visitor (Information, History), and Special (Account, Activity, Background Checks, Facility). The main area is titled "Student Reports" and lists several report options: Contact Information 1 Line, Student 1 Line, Student Brief, Student Brief with Activities, Student Details, Student Details with Picture, Student Person Card, and Student Security List 1 Line. Below this is a "Selections" section with the following fields: First Name (Timmy), Last Name (Jefferson), Facility (Jefferson Elementary School), Creation Date (07/22/2019 to 07/22/2019), Person Info (Student ID: 0123456), Student Info (Grade: 2), Security Group (Person), Effective Date (From mm/dd/yyyy to Through mm/dd/yyyy), and Expiration Date (From mm/dd/yyyy to Through mm/dd/yyyy). A "Sort By" dropdown is set to "Last Name" and an "Exact Classification Selection" checkbox is unchecked. A "Run Report" button is located at the bottom right of the main area.

Utilities

A few ways to mass manipulate your data.

Volunteer Verification

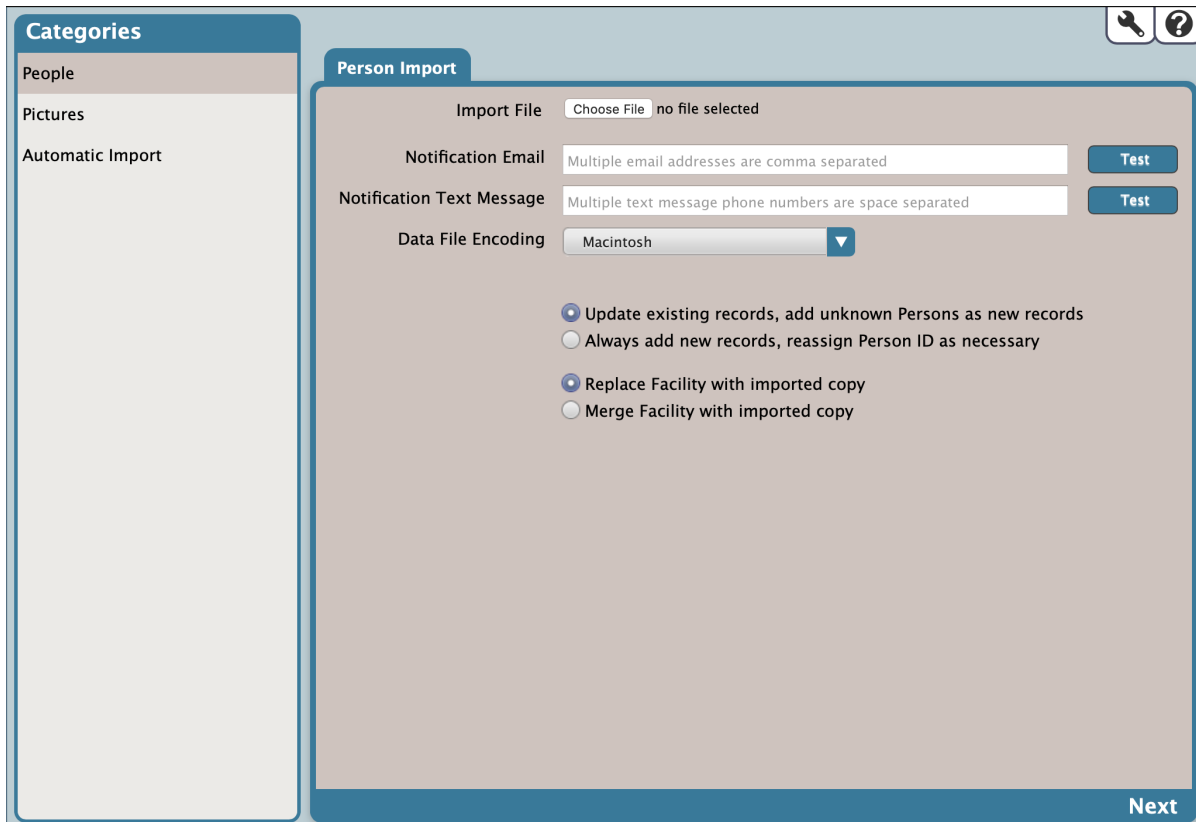
The last step in verifying new applicants. Also gives you the option to snap their photo and assign them a unique person ID and even an ID card if it suits your chosen process.

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 upload files of various People information, such as student files from your 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.



The screenshot shows the 'Person Import' configuration page in the KeepnTrack application. On the left, a 'Categories' sidebar lists 'People', 'Pictures', and 'Automatic Import'. The main area is titled 'Person Import' and contains the following fields and options:

- Import File:** A 'Choose File' button and the text 'no file selected'.
- Notification Email:** A text input field with the placeholder 'Multiple email addresses are comma separated' and a 'Test' button.
- Notification Text Message:** A text input field with the placeholder 'Multiple text message phone numbers are space separated' and a 'Test' button.
- Data File Encoding:** A dropdown menu currently set to 'Macintosh'.
- Import Options:** Four radio button options:
 - Update existing records, add unknown Persons as new records
 - Always add new records, reassign Person ID as necessary
 - Replace Facility with imported copy
 - Merge Facility with imported copy

A 'Next' button is located at the bottom right of the configuration area.

Application Picker

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

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.

Security

A customizable breakdown of security levels and granular capabilities.

MANAGEMENT CATEGORIES

Activities

Other than People, **Activities** is 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, saved in **History**, and will reflect on reports. Make sure to spend some time here to carefully set 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.

The screenshot displays the KeepnTrack interface. On the left, there is a table with columns for Activity Name, Facility, Classification, and Status. The table lists various activities such as 'After School', 'Assembly', 'Cafeteria', 'Classroom', 'Club', 'Community Service', 'Computer Lab', 'Delivery', 'Detention', 'Early Dismissal', 'Education', 'Field Trip', 'Guidance', 'Late Arrival', 'Main Office', 'Maintenance', 'Media Center', and 'Mentor'. On the right, the 'Details' tab is active, showing configuration options for a selected activity. The 'Destinations' tab is also visible. The details form includes fields for Status (Active), Facility (Account), Classification (Volunteer), Activity Name (After School), Minutes Awarded (60), Notes on Kiosk Sign In (Do not show Notes), Notes on Kiosk Sign Out (Do not show Notes), Effective Date (mm/dd/yyyy), Expiration Date (mm/dd/yyyy), Print Format (Badge), Transaction Type (Untimed, Sign-In), Description, Notes Label in Kiosk, Show on Application (checked), and Show on Kiosk (checked).

Activity Name	Facility	Classification	Status
After School	Account	Volunteer	Active
Assembly	Account	Visitor	Active
Assembly	Account	Volunteer	Active
Cafeteria	Account	Visitor	Active
Classroom	Account	Visitor	Active
Classroom	Account	Volunteer	Active
Club	Account	Student	Active
Community Service	Account	Student	Active
Computer Lab	Account	Student	Active
Delivery	Account	Vendor	Active
Detention	Account	Student	Active
Early Dismissal	Account	Student	Active
Education	Account	Visitor	Active
Field Trip	Account	Volunteer	Active
Guidance	Account	Staff	Active
Late Arrival	Account	Student	Active
Main Office	Account	Visitor	Active
Maintenance	Account	Staff	Active
Maintenance	Account	Vendor	Active
Media Center	Account	Visitor	Active
Mentor	Account	Volunteer	Active

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 functions from previous days.

KIOSKS



Attended Kiosk



Self-Service Kiosk



Express Kiosk

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 differ greatly from the **Administration** module, which is used to change settings, approve applications, and perform sex offender and criminal background checks.

KeepnTrack's Kiosks consist of the following interfaces:

Attended Kiosk

myfacility.keepntrack.com/kiosk

Self-Service Kiosk

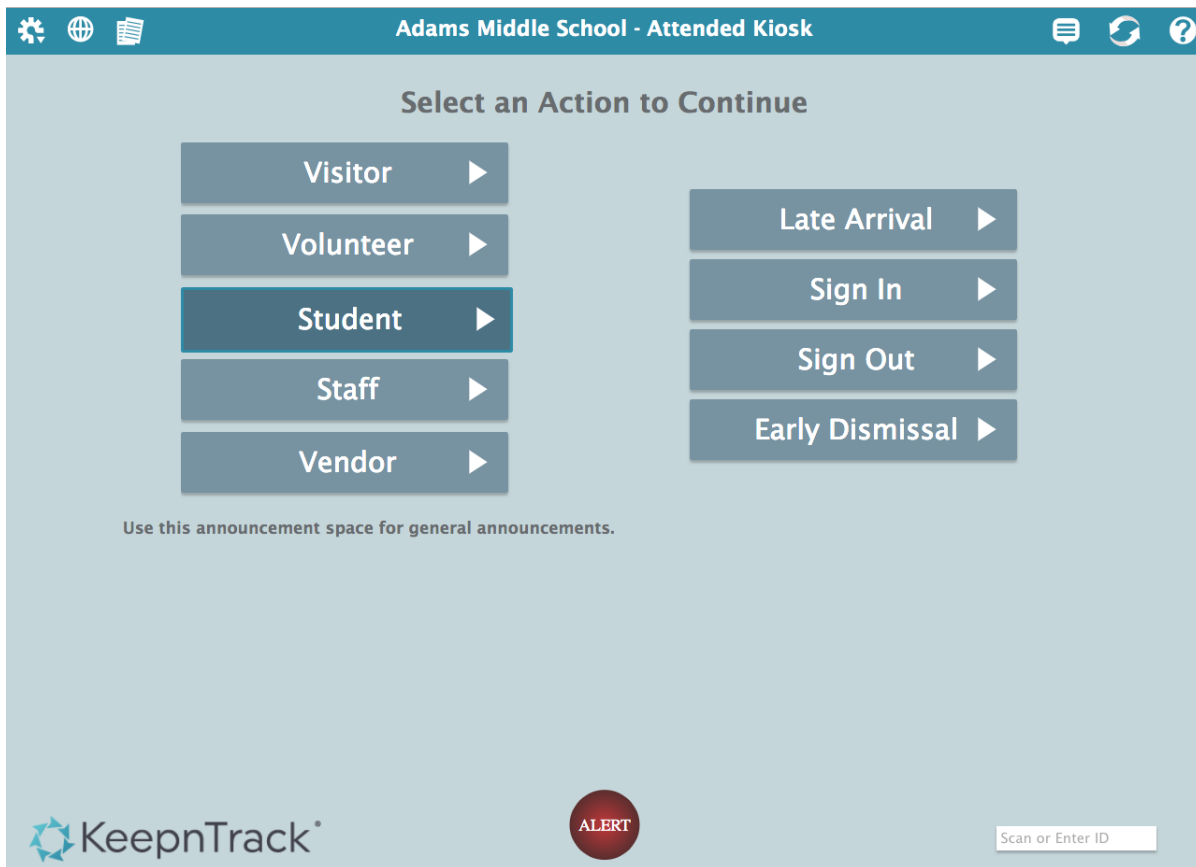
myfacility.keepntrack.com/selfservice

Express Kiosk

myfacility.keepntrack.com/express

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.

GENERAL SIGN IN

1. Select the **Classification** of the person standing in front of you with which they would like to sign in.
2. Choose **Sign In** or **Sign Out** depending on which **Activity** they are doing. For example, to sign a student out of school early, you would choose **Student** and then **Sign Out**, as the **Activities** that would be used to sign the student out are located under the **Sign Out** activities.
3. 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.
4. 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 if those are the options that have been set up.



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.

GENERAL SIGN OUT

Not all **Activities** need to be **Signed Out**. Some are a one-time performance and are called **Untimed Activities**, such as when a student signs out of school for the day. In order to log a sign out time, an **Activity** DOES need to be **Timed**. If the activity is Timed or needs to be signed out of, follow one of the methods 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.
- The quickest way to sign a person out involves using the bottom right **Command Line**. You will notice the Command Line has the ghost text "**Scan or Enter ID**" inside of it. To use this **Command Line**, you will scan the barcode located on the bottom right of the temporary sticker badge that was printed for the person at the time of sign in.

POSSIBLE OFFENDER SIGN IN

In the case of a possible offender attempting **Sign In**, a window will pop up displaying actual possible matches to that person's information which 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.

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.

Jefferson Elementary School - Attended Kiosk

KeepnTrack

Possible Offenders

- TRUE K SEAL
- LEANDREW LARONN MENELEE
- STANLEY HERRING
- MICHAEL JEFFERY DUKE**
- FREDERICK SMITH

Possible Offender

MICHAEL JEFFERY DUKE
2555 N. 6TH STREET 2ND FLOOR
HARRISBURG, PA 17110

Sex: M
Birthdate: 00/00/1980
Ethnicity: WHITE
Age:
Eye Color: HAZEL
Hair Color: BROWN
Height: 5'10"
Weight: 190

John Doe
Birthdate: 01/01/1980

Use of Sex Offender Checks are subject to the obligations and protections of your state laws and the Fair Credit Reporting Act.
[Click here to learn more.](#)

ALIAS: JASON MCNEIL BIRTHDAY: 1980-00-00
ALIAS: JASON J MCNEIL BIRTHDAY: 1980-00-00
ALIAS: JOHN DOE BIRTHDAY: 1980-00-00
ALIAS: MICHAEL DUKE BIRTHDAY: 1980-00-00
ALIAS: MICHAEL J DUKE BIRTHDAY: 1980-00-00
Last Update: 1/28/2019 6:52:17 AM
Sex Offender Register Date: 12/28/2012
Reporting State: PA

Not a Match This is a Match

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, or when a possible offender was identified to be a positive match. When there is an attempt to sign that individual into the **Attended Kiosk**, they will be recognized as **Denied Access** and a corresponding message will pop up. 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 this person's info is set to **Denied Access**. 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.

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 these individuals.

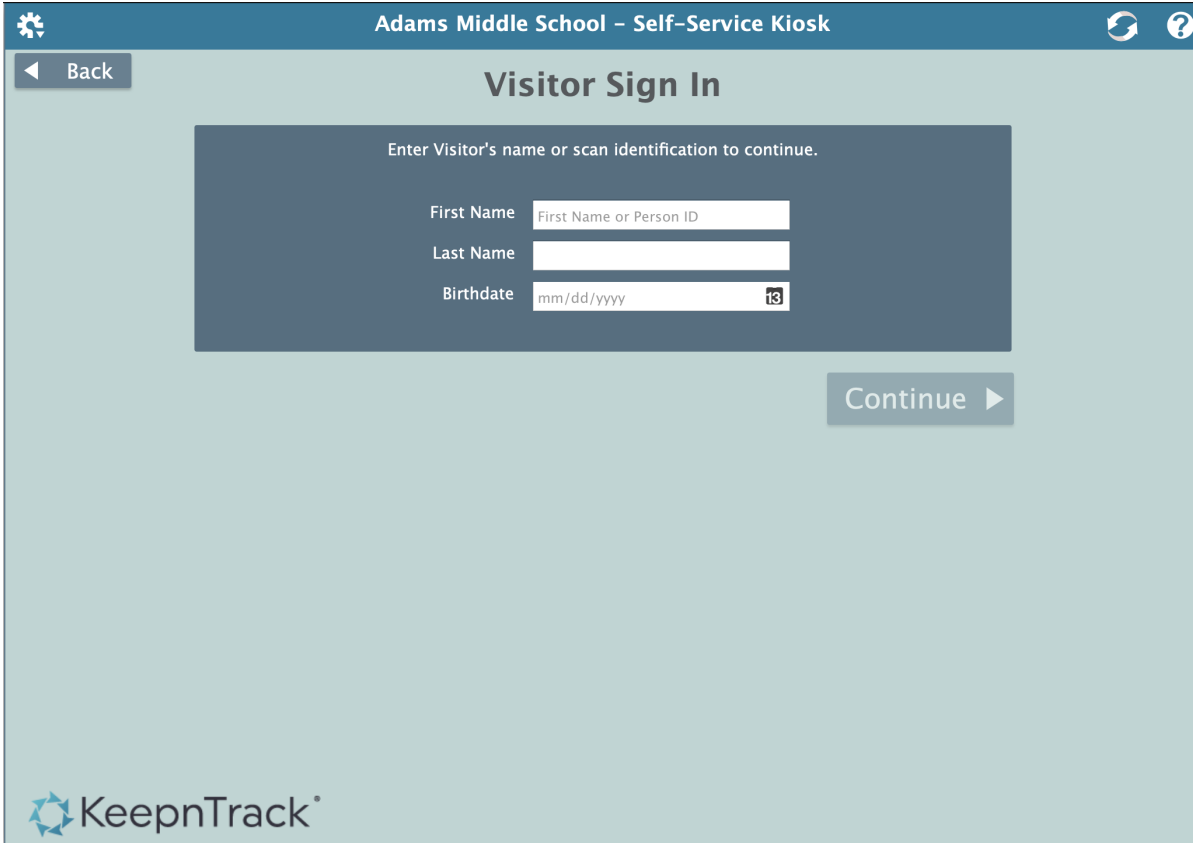
QUICK REPORTS

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**.

SIGN IN



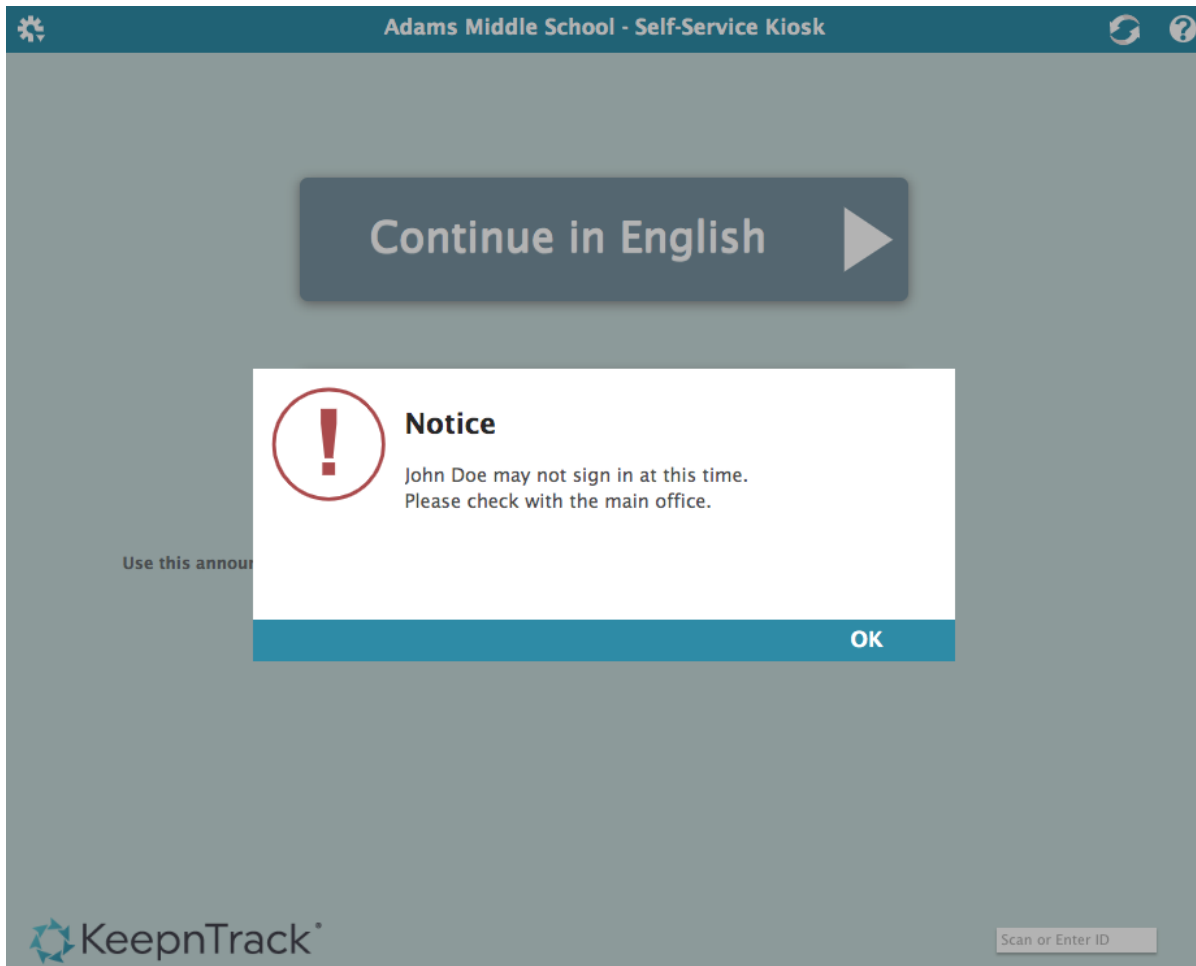
The screenshot shows the 'Adams Middle School - Self-Service Kiosk' interface. At the top, there is a blue header with a gear icon on the left, the title 'Adams Middle School - Self-Service Kiosk' in the center, and a refresh and help icon on the right. Below the header is a 'Back' button with a left arrow. The main content area is titled 'Visitor Sign In' and contains a dark blue box with the instruction 'Enter Visitor's name or scan identification to continue.' Inside this box are three input fields: 'First Name' with a placeholder 'First Name or Person ID', 'Last Name', and 'Birthdate' with a placeholder 'mm/dd/yyyy' and a scan icon. To the right of the input fields is a 'Continue' button with a right arrow. At the bottom left of the screen is the 'KeepnTrack' logo.

1. First, the person will select the language (if it's set up) and the **Classification** they would like to sign in as.
2. After clicking the **Sign In** button, either scan your ID, enter your **Person ID**, or type in the required **Name** and **Birthdate** information.
3. 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.

SIGN OUT

- The first way an individual 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 Line** in the bottom right corner of the language selection screen.

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.

3 Express Kiosk

The **Express Kiosk** allows you to quickly sign multiple people in for a single activity. This does require the **Visitors/Attendees** to have already been added to **People Management**. Meaning, if this is their first visit to the facility, they will be required to check-in through an **Attended** or **Self-Service Kiosk**.

Adams Middle School

Select a Classification below and then select an Activity to continue. Optional Destination and Notes may also be required for the selected Activity.

Visitor Volunteer Student Staff Vendor

Activity	Destination	Notes
Club	Dentist Appointment	Notes are not required for the Activity "Late Arrival"
Community Service	Doctor Appointment	
Computer Lab	Sick	
Detention	Work Release	
Late Arrival		
Sports		

KeepnTrack®

Back Continue

SETTING UP THE EXPRESS KIOSK

1. Open your KeepnTrack main page and click on the **Express Kiosk** button.
2. 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**).
3. After selecting the type, you will then set up the **Visitor Classification** and **Activity** that the Kiosk will be used for.
4. 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.

4 Workstation Management


The **Workstation Management** window can be accessed under the gear at the top left of each Kiosk. It provides you with an easy way to set up your station, and to 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 or email KeepnTrack Customer Support at **(800) 320-5830** or support@keepntrack.com.

The screenshot displays the 'KeepnTrack Workstation Management' interface. On the left is a navigation sidebar with icons for 'Introduction', 'Information', 'Station', 'Printers', and 'Scanners & Cameras'. The main content area is titled 'Station Settings' and includes a sub-header: 'These settings are used to customize the hardware and settings for your current machine'. The settings are organized into several sections:

- Sign In/Out Options:** A list of six checkboxes, all of which are checked: Visitor Sign In/Out, Volunteer Sign In/Out, Student Sign In/Out, Staff Sign In/Out, Vendor Sign In/Out, and Enable Reports Menu.
- Workstation Name:** A text input field.
- Show ALERT Button:** A checked checkbox. Below it is a descriptive paragraph: 'The ALERT button is a quick way for an Attended Kiosk operator to call for assistance. Clicking this button automatically sends an alert to the Facility and Account addresses configured in Alerts Preferences.'
- Enable Sex Offender Checks for Visitors and Volunteers:** A checked checkbox. Below it is a red warning text: 'Birthdates are required for Sex Offender Checks. If your Preference settings for Visitors or Volunteers are to 'Never require a birthdate for sign-in', you may want to turn off Sex Offender Checks in your Workstation Settings.'
- Require Picture:** An unchecked checkbox. Below it is a note: 'If pictures are required but the camera is not enabled, this Kiosk will not be able to Sign In new Visitors.'
- Volunteer Label:** A text input field.
- Camera and Printer Settings:** A section with a 'Camera' dropdown menu and five rows, each with a 'Show Camera' button and a dropdown arrow. The rows are labeled Visitor, Volunteer, Student, Staff, and Vendor.

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:

1. 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**.
2. 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**.
3. 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**).
4. 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.
5. 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** (both the **Volunteer Approval** and **Volunteer Applications** areas).

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: [myfacility.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.

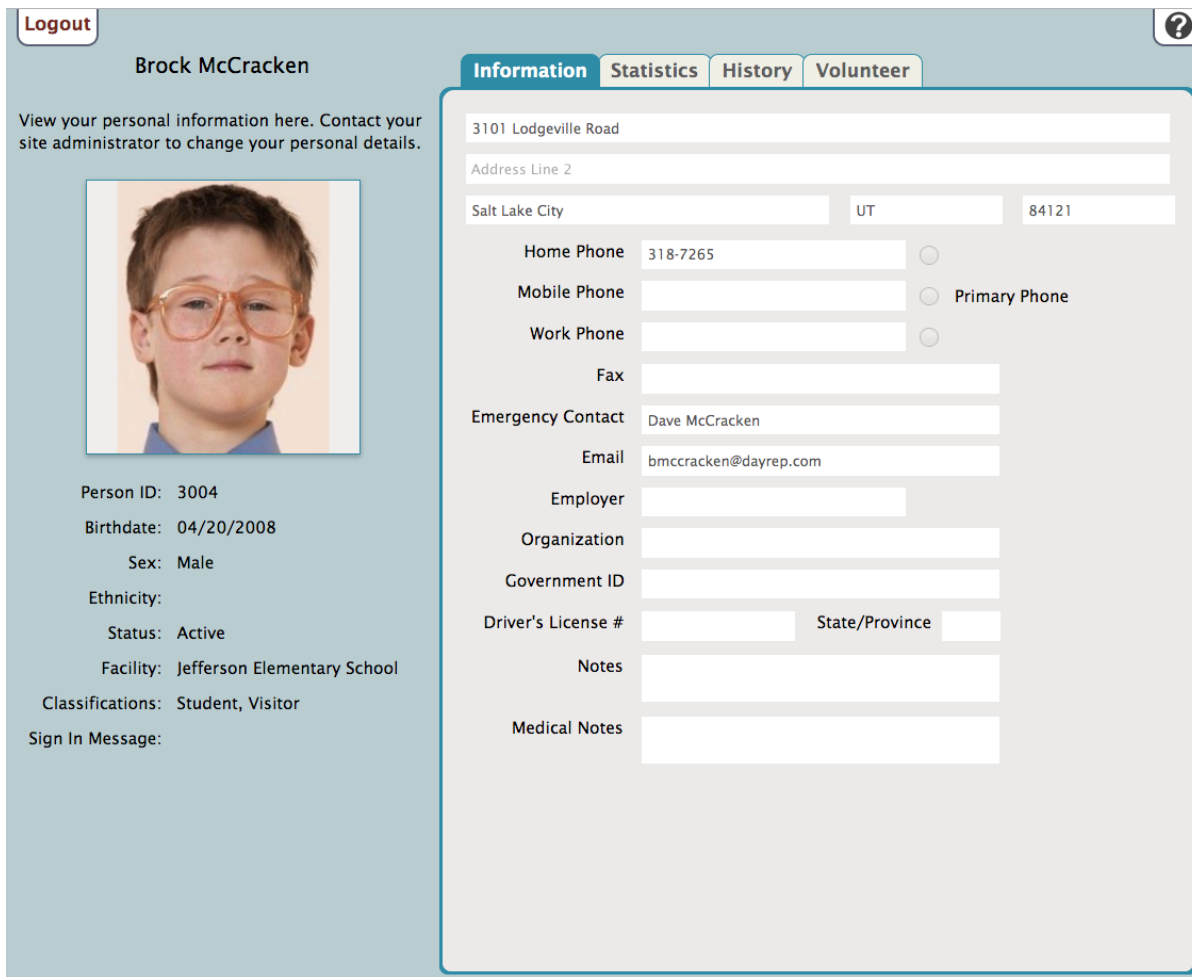
2 Approving the Application

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: [myfacility.keepntrack.com/volunteers](#).

1. First, once in the **Volunteer Applications** screen, it must be unlocked.
2. 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.
 - a. If the **Approve** button is chosen, the application will leave the **Volunteer Applications** list and be viewable under the **People Management** interface.
 - b. If the **Reject** button is chosen, the application will stay in the **Volunteer Applications** list but will only be viewable by using the magnifying glass at the bottom left with 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, set up specific to the Security Group assigned to your volunteers.



Logout Brock McCracken ?

View your personal information here. Contact your site administrator to change your personal details.

Information Statistics History Volunteer

3101 Lodgeville Road
Address Line 2
Salt Lake City UT 84121

Home Phone 318-7265
Mobile Phone Primary Phone
Work Phone
Fax
Emergency Contact Dave McCracken
Email bmccracken@dayrep.com
Employer
Organization
Government ID
Driver's License # State/Province
Notes
Medical Notes

Person ID: 3004
Birthdate: 04/20/2008
Sex: Male
Ethnicity:
Status: Active
Facility: Jefferson Elementary School
Classifications: Student, Visitor
Sign In Message:

To log in:

1. Your 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.
2. Next, 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:
myfacility.keepntrack.com/status.



This URL can be posted on a facility website as a link, offered to the volunteers in an email, or included on paper documentation.

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.

1 (800) 320-5830 | support@keepntrack.com

Or visit our online Support Center at support.companioncorp.com/display/KnT.