




Getting Started Guide

KeepnTrack Support Center:

<http://www.keepntrack.com/supportcenter/index.php/>

Search the KeepnTrack Support Center using the keycodes (**KC**) you encounter in this guide to forward you to related information.

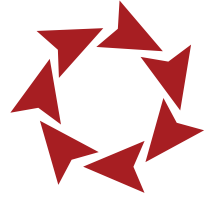
You may click the (?) in any KeepnTrack interface to review related articles in our Support Center; here you can find videos, step-by-steps, and more comprehensive descriptions of features and procedures.

KeepnTrack - Getting Started Guide

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Please carefully read this Getting Started Guide before setup or use of the KeepnTrack system. If, after reading all of the instructions, you still have questions, please contact our Customer Support at support@keepntrack.com or call (800) 320-5830.

COMPanion Software Subscription

KeepnTrack databases are hosted on servers that use state-of-the-art hardware for optimal performance and reliability. This means you save time and resources. From our advanced data centers, we perform daily archives and backups of your data, and handle *all* the updates and upgrades to ensure you *always* have the latest features. Your KeepnTrack service includes a COMPanion software subscription, which gives you:

- A complimentary DNS name for your school (e.g. accountname.keepntrack.com).
- Safe and secure (🔒 [https](https://)) communications between you and our servers.
- No need to set special ports or firewall configurations.
- No need to install KeepnTrack software, no necessary server maintenance.
- Redundant internet connections, battery-backup, and generator-protected power.
- Specialized staff with tools to monitor performance, connection, and stability 24/7.
- Free upgrades to more advanced, future versions at no extra charge.
- Customer support—24 hours a day, 7 days a week (via email, toll-free fax, and toll-free phone).



Trademarks are property of their respective owners. KeepnTrack® is a trademark of COMPanion Corporation. Elements of the KeepnTrack system and related network services are patented or patent pending, both in the United States and internationally.

Packing List

Thank you for choosing KeepnTrack

You have licensed the following product(s); contact COMPanion at 1-800-347-6439 with questions or concerns.

Core Products

District Account License	<input type="checkbox"/> J1001/J1005
Single Facility Account License	<input type="checkbox"/> J1015

Setup information for optional services is available by searching keycode (**AS**) in our online Support Center.

Import Services

Person Import (Standard)	<input type="checkbox"/> J2901
Person Import (Custom)	<input type="checkbox"/> J2909

Data Integration Services

Identity Automation	<input type="checkbox"/> J4000
Identity Automation (Custom)	<input type="checkbox"/> J4001
Level Data	<input type="checkbox"/> J2910

Additional Services

Criminal Background Check Services	<input type="checkbox"/> J33__
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Welcome to KeepnTrack

KeepnTrack is a visitor management and front office security system that helps protect your students and staff by accurately recording the information of anyone entering or leaving your facility. The sign-in process is quick and instantly screens for registered sex offenders across a large repository of data sourced from national, state, and local agencies—so you can keep unwanted visitors out and stop danger in its tracks.


Additionally, KeepnTrack can be used to log and report faculty and volunteer hours, record student early dismissals and late arrivals, organize volunteer programs, define visitor activities, and quickly pre-register volunteers with our integrated, online application.


When a visitor is cleared, KeepnTrack prints an adhesive, time-stamped badge with the visitor's name, photo, and activity they are attending—including a scannable barcode for sign out. This way, you know *exactly* who is in the building in the case of an emergency or evacuation.

If a potential threat is identified, KeepnTrack will instantly alert school administrators and allows for notifications to be sent to local law enforcement via email or text messages.



This *Getting Started Guide* will show you how to access and setup your KeepnTrack **Kiosks** and **Administration** interfaces and provide you with setup suggestions and references to additional help and information.

 The **KeepnTrack Administration** interface (page 5) is where you manage and evaluate data in your system as well as run reports, perform utilities, change preferences, and adjust settings to best serve the needs of your organization. Only KeepnTrack operators with the proper security permissions have access to this interface.

 The **KeepnTrack Kiosks** (page 10) are the primary interfaces that the majority of your students, staff, and visitors will interact with daily and have optional attended, express, and self-service features.

1

Registration

Registration is automatic; just follow the URL we provide you. If this is your first time logging into the KeepnTrack system, you will find your **Account**-level operator access credentials with your license registration letter.

COMPANION will also *email* you the URL, **Login**, and **Password** required to access KeepnTrack . If you can't locate this email, check your SPAM, junk, or deleted items folders as your confirmation email may have been accidentally placed there.

If you've licensed **Criminal Background Checks** or any of our additional services, they are automatically activated.

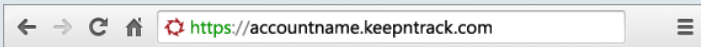
2

Accessing KeepnTrack


KeepnTrack interfaces are cross-platform, accessible on both Macintosh and Windows operating systems via current versions of HTML5-compliant web browsers such as Safari, Firefox, Internet Explorer, Edge, or Chrome.

On a computer with internet access, open a browser window and enter your personalized KeepnTrack URL into the **Address** field (typically located at the top-left of the window). For example:

<https://youraccountname.keepntrack.com>



Bookmarking Your KeepnTrack URL

For future convenience, you may want to “bookmark” your primary KeepnTrack URL or add it to your browser’s list of favorites; you can do this by clicking on your browser’s corresponding **Bookmark** icon. You may also create a shortcut to KeepnTrack from your operating system’s Desktop; to do this, highlight your KeepnTrack URL in the **Address** field (or  “favicon”) and drag it to the Desktop to create a link.

NOTE:



Be sure that the URL address specified in your bookmark is the *short, simple* URL we provided you (e.g. <https://accountname.keepntrack.com>) and *not* the longer URL address where you’re routed when the **Administration**, **Kiosk**, or **Login** window has finished loading.

3 Interface Selection

Before you can log into KeepnTrack, you will be asked to select a service. The portal (shown below) provides a launch pad from which you are able to select certain interfaces or apps that have been developed for use with KeepnTrack. An **Account**-level operator has access to *all* areas of the system, including **Admin** and **Kiosks**; you may (or may not) have access to certain areas of KeepnTrack depending on your security privileges and permissions.



- If you would like to access the **Administration** module (*recommended*), click **Admin** (see page 5).
- If you would like to launch a Kiosk, click **Attended**, **Self-Service** or **Express Kiosk** (see page 10).

4 Security and Operator Login

In order to prevent unauthorized access and protect private information, a valid **Login** and **Password** are *required* to access **Admin** or **Kiosk** interfaces. Fortunately, an **Account**-level operator with the equivalent security **Access Level** has already been created for you; please review your confirmation email for your login information.

KeepnTrack requires that each operator have their own **Login** and **Password** and an appropriate **Security Group** to proceed past the **Login** window. Keep in mind that some operators may not have permission to access certain interfaces or perform some tasks; login credentials determine which area(s) of KeepnTrack a user may access. For example, if a person logs in with an **Operator**-level **Security Group**, they may only have permission to access the **Kiosks**.

If you are having difficulty logging in, please contact COMPANION's Customer Support team at (800) 320-5830. To create additional operators; refer to page 8 or search KeepnTrack's Support Center using keycode (**MO**).

KeepnTrack's Administration Interface

After logging in, you'll arrive at the **Administration** interface. One of the first things you'll notice is a series of icons on the left side of the window. Each of these is a shortcut to one of KeepnTrack's main administrative sections: **About**, **People**, **Tools**, and **Log Out**.

Administration Modules



About

This is the overview for KeepnTrack's main **Administration** interface, with subtabs containing helpful links to commonly used features, online documentation, information about the current operator, and convenient methods for you to **Log Out**.



People

This tab contains the tools you need to manage **People** (including operators).



Tools

This is the location of various tools and utilities such as, **History** records, **Applications**, **Security**, and **Activities** that allows you to easily manage your **KeepnTrack** system.



Log Out

This tab allows you to quickly and easily log out.

For more information about the **Administration** interface, search our online Support Center using keyword ()

1

Setting Up KeepnTrack

As you explore KeepnTrack, become familiar with the standardized layout of information in tabs and subtabs—not to mention the location of important settings and features. You may notice the round **Help** (?) icon in the upper-right corner of most interface windows; clicking this will open a new tab in your browser to a related article in KeepnTrack's online Support Center.

After accessing and familiarizing yourself with the **Administration** interface, we suggest you review the information in your **Preferences** tab before going any further; this provides access to **Account** and **Facilities** subtabs where you can configure account and facility-specific settings and information. You'll want to ensure that the information there is accurate.

✓ Setup Checklist:

We recommend that you configure **Administration** settings in the following order:

<input type="checkbox"/> 1) Account	Configure your account-specific preferences—these affect <i>every</i> facility in your organization.
<input type="checkbox"/> 2) Facilities	Create and manage site-specific preference settings for individual facilities in your organization.
<input type="checkbox"/> 3) Security	Modify existing or create your own custom security groups by manipulating lists of permissions.
<input type="checkbox"/> 4) Operators	Create your system operators and configure their abilities and permissions on a case-by-case basis.
<input type="checkbox"/> 5) People	Import person information directly into KeepnTrack; also perform criminal and sex offender checks.
<input type="checkbox"/> 6) Activities	This is where the activities available to people at your organization are created and customized.

This *Getting Started Guide* will describe these settings more thoroughly with embedded and referential links to more comprehensive online documentation.

NOTE:



Your **Attended**, **Express** and **Self-Service Kiosks** (including the printers, scanners, and other peripherals used with KeepnTrack) are setup and configured using **Workstation Management** (page 13). **Kiosks** can also be customized on a station-by-station basis to include only **Classifications** relevant to your needs; please search our Support Center using keycode (WM) for more information.

2

Preferences



Step 1: Account Preferences

An “account” is the master, governing entity for a group of **Facilities** (i.e. an **Account** is equivalent to a **School District**) where all of your organization’s data is configured and stored. An **Account** is where you set the *global* standards and preferences that become the defaults for all future facilities.

KeepnTrack’s **Account Preferences** are divided into *three* distinct sections: **General**, **Classification**, and **Kiosk**. Start with the **General** preferences first, reviewing information in each section for content and accuracy. Then, work your way through the **Classification** and **Kiosk** preferences.

Individual facilities are allowed to deviate from the defaults configured here using **Facilities Preferences** (see Step 2); changes made to **Facilities Preferences** are *only* seen by *that* facility’s operators and **Kiosk** users.

For more on KeepnTrack’s **Account Preferences**, search our Support Center using keycode (**AP**).



Step 2: Facilities Preferences

A “facility” is a single establishment contained within an **Account** (i.e. a **Facility** is equivalent to a **School**). **Facilities** are where you manage the *local* preferences for individual facilities in your organization and configure site-specific settings such as **Kiosk** messages and alerts. If you have multiple facilities, now is the perfect time to add them.

Provide the basic information for each new facility, paying close attention to the **Facility ID**—this *must* be unique. Also be sure to provide a valid **Facility Email** address; among other things, this is used for volunteer application notifications. After each facility is created, make adjustments to each facility’s individual preferences and review them for accuracy.

Just like **Account Preferences**, KeepnTrack’s **Facilities Preferences** are divided into *three* distinct sections: **General**, **Classification**, and **Kiosk**.

Each facility may deviate from the defaults established in **Account Preferences**; however, changes made using **Facilities Preferences** are only seen by *that* facility’s operators and **Kiosk** users.

The number of facilities that are managed by KeepnTrack is set and determined by your licensing. If you need to add or remove facilities, contact KeepnTrack’s sales team.

For more on **Facilities Preferences**, search KeepnTrack’s Support Center using keycode (**FP**).

3

Manage People, Operators, Security, and Activities



Step 3: Review Security *Administration » Tools » Security*

Next, we recommend that you examine the default security groups; you can then modify lists of permissions for existing security groups or create your own. In turn, these **Security Groups** (assigned to individuals in **Administration » People » Personal Info**) determine what actions operators and/or people are permitted to perform.

When a new person is added to KeepnTrack, their default **Security Group** will be **Person**. However, you may need to change their **Security Group** to one that grants more appropriate permissions, especially if they're an operator.

Your initial **Account Administrator** operator has access to *all* preferences, facility settings, reports, logins, people information, and activities for the facilities in your account—including access to **Kiosk** stations and settings. Your **Account Administrator** can be edited, but *not* deleted; KeepnTrack must *always* have *one* **Account**-level operator.



Step 4: Create Your Operators *Administration » People*

At this point, although you already have an **Account Administrator**, we recommend you create additional KeepnTrack operators with more restrictive permissions as needed for your facilities. KeepnTrack operators are essentially just a special kind of person; therefore, they are added to your system using **Administration » People**. What differentiates an operator is their **Security Group** setting; an operator may have access to **Kiosk** stations, the **Admin** interface, or both.

The very first operators that you should create are your **Facility Administrators** or **Administrators** with the equivalent **Security Group** access. Do not forget to create a **Username** (i.e. **Login ID**) and **Password** for new operators since they're required to **Log In** to the system and create, edit, examine, or delete other people and/or operators.



Step 5: Import Students & Staff *Administration » Tools » Import*

Once you've established operator records for your facility, it's time to add the people who visit or attend your facilities—whether they be students, staff, vendors, or volunteers.

Both people and operator records can be added to your system from **Administration » People** or a tab-delimited import file using the **Person Import** utility (page 9). For more information on how to add **People** and/or **Operators**, search KeepnTrack's Support Center using keycode (**IM**).

For more information on how to perform KeepnTrack's **Sex Offender Check** on new people, search KeepnTrack's Support Center using keycode (**SO**).

How to Import People

KeepnTrack can import “person” data from any source capable of outputting text files in a tab-delimited format. Additionally, with our FTP import functionality, an entire student or staff database can be stored in a central location and KeepnTrack—once configured—can perform bulk uploads of new (or update existing) employees, students, and parents as they become available.

Files from a Student Information System (SIS) can be used to import basic person information (name, address, etc.)—usernames and passwords can *also* be imported. Check with your front or district office to find out if your person data is stored in a machine-readable format.

Related Import Topics at KeepnTrack’s Support Center

IM

Import Person Records—Add information into KeepnTrack from outside sources such as a district or facility database.

FT

Automatic Import—Configure a nightly, automatic FTP person import during routine maintenance.

FM

Field Mapping—This allows you to match tab-delimited import files to KeepnTrack data fields. If you are building your initial import files, the necessary fields *must* be specified: **First Name**, **Last Name**, **Facility** (or **Facilities**), **Classification**.



Step 6: Create Activities [Administration » Tools » Activities](#)

The **Administration » Tools » Activities** section allows you to add, remove, modify, and view activities—traceable events created for KeepnTrack that happen in or around your facility (e.g. assemblies, field trips, community service, dental appointments, guidance counseling, and sports events).

There are three types of activities: *sign in only* (e.g. **Late Arrival**), *sign out only* (e.g. **Early Dismissal**), or a *timed* activity (e.g. a “classroom volunteer”).

For more information on creating **Activities**, search our Support Center using keycode (**MA**).

Accessing KeepnTrack's Kiosks

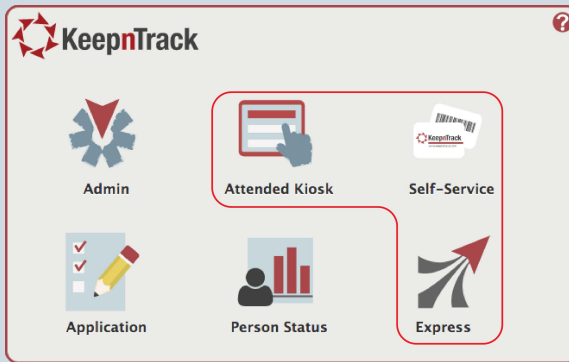
Once everything on the **Administration** end has been properly configured, you are ready to use the **Kiosk** interface to begin screening and tracking people and their activities.

The KeepnTrack **Kiosks** differ greatly from the **Administration** interface and provide a user-friendly way to sign people of *all* classification types (e.g. visitors, volunteers, staff, students, etc.) in and out of your facility.

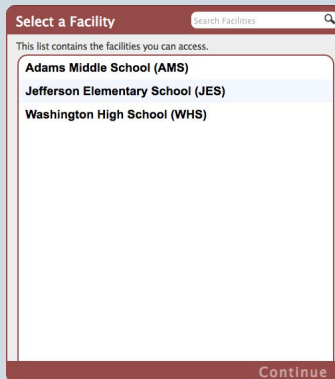
KeepnTrack also provides an **Express Kiosk** mode where multiple people can be quickly signed in for a single activity. For more information on **Express** mode, please search KeepnTrack's Support Center using keycode (EK).

Accessing the Kiosk

By following the instructions on how to access and **Log In** to KeepnTrack (page 3), you'll be given the choice to select from one of the following **Kiosk** interfaces:



When an operator with access to more than one facility selects a **Kiosk**, they will be asked to **Please Select A Facility**. Depending on their **Administration » Tools » Facilities** settings (MO), they may not have permission to access **Kiosks** for facilities other than their own.



After picking the **Attended**, **Express** or **Self-Service Kiosk**, logging in, and then choosing your facility (if applicable), the selected **Kiosk** interface will appear.

Attended, Express and Self-Service Kiosks

Regardless if it's **Attended**, **Express** or **Self-Service**, these **Kiosks** are used the same way for nearly every classification type (visitors, volunteers, etc.) whose activities and hours you want to track.



Attended Kiosk

Depending on how your facility operates, you may require people to sign in/out through a school secretary or the front office to complete the KeepnTrack visitor approval process. An **Attended Kiosk** guarantees that everyone entering and leaving your school is monitored, not only by KeepnTrack, but also by actual school personnel.

Potential sex offender results are reviewed by KeepnTrack operators so that the appropriate action can be taken, including the recording of false positives. A questionable individual who attempts to sign in through a **Self-Service Kiosk** will *always* be directed to the main office for further processing.

For more information on the **Attended Kiosk**, please search KeepnTrack's Support Center using keycode (**AK**).



Self-Service Kiosk

KeepnTrack also offers a **Self-Service Kiosk**, allowing you to set up one or more stations that permit people to sign themselves in or out without the help of school staff—saving time and resources.

The **Self-Service Kiosk** consists of a simplified interface that facilitates *nearly* everyone, including visitors who have never signed in before.

However, a **Self-Service Kiosk** has no administrative functions, allows no management decisions, and can not be used to review potential sex offender matches. Therefore, we still recommend that one or more operators be familiar with the **Attended Kiosk** to help visitors who may struggle with the **Self-Service Kiosk** or perform additional security checks, when required.

For more information about **Self-Service Kiosks**, please search KeepnTrack's Support Center using keycode (**SS**).

NOTE:



Your **Attended**, **Express** and **Self-Service Kiosks** (including the printers, scanners, and other peripherals used with KeepnTrack) are setup and configured using **Workstation Management** (page 13). **Kiosks** can also be customized on a station-by-station basis to include only **Classifications** relevant to your needs; please search our Support Center using keycode (**WM**) for more information.



Express Kiosk

There may be times when you need to sign in or out a large number of visitors. Common examples are sporting events, concerts or large school functions. The **Express Kiosk** works best when used with an ID scanner such as our Universal KeepnTrack Scanner.

For more information on the **Express Kiosk**, please search KeepnTrack's Support Center using keycode (**EK**).

NOTE:



Your **Attended, Express** and **Self-Service Kiosks** (including the printers, scanners, and other peripherals used with KeepnTrack) are setup and configured using **Workstation Management** (page 13). **Kiosks** can also be customized on a station-by-station basis to include only **Classifications** relevant to your needs; please search our Support Center using keycode (**WMM**) for more information.

People Classifications

There are five classifications of people who can access your facilities:



Visitor **VI**

People who will infrequently visit your facilities (e.g. parents or grandparents).



Volunteer **VO**

People who volunteer at your facility. Once signed in, volunteer activities and hours are tracked.



Student **ST**

Students can *sign in* or *out* for activities and allow for **Early Dismissal** or **Late Arrival**. Once students are signed in, their activities can be easily tracked and reported.



Staff **SF**

People who work at your facility; all employee activities and hours are tracked by the system.



Vendor **VE**

People who perform services at your facility. Once signed in, vendor activities and hours are tracked.

People *may* be asked to supply supplemental job numbers, identification codes, or the make and model of their vehicle. Everyone is required to enter their full name and birthdate. Those who are permanently enrolled in your database need only provide their **Person ID** number or have their KeepnTrack ID card scanned.

KeepnTrack will prompt users to select the **Activity** they are there to attend. All activities are configured in the **Tools» Activities** settings of your **Administration** interface; see page 9 for more information.

After all information is gathered, a person will either be verified or rejected. Those who are accepted will be officially signed in to your facility. When enabled, a highly-visible, self-adhesive name badge will be printed for your visitor to wear at all times while on the premises.

NOTE:



Once a first-time visitor has been enrolled, they are available system-wide for *all* facilities. Other **Classifications** of people *must* be assigned to a specific facility in order to attend selected activities.

How to Handle Potential Offender Matches

KeepnTrack can perform automatic, behind-the-scenes sex offender checks every time a visitor attempts to sign in to the **Kiosk**. KeepnTrack requires only the *full legal name* and *date of birth* to identify a visitor; this information is instantly screened against a large repository of data sourced from national, state, and local agencies—including sex offender registries—and helps to reduce the chance of false positives. In the event that a potential match is found:

Potential offender match from a Self-Service Kiosk:

If a visitor first attempts to sign themselves in using a **Self-Service Kiosk** and are flagged as a potential offender, they are *immediately* directed to your main office for further evaluation. This step can be omitted if the visitor does not attempt to sign themselves in using the **Self-Service Kiosk**.

Potential offender match from an Attended Kiosk:

The attendant will take the individual's driver's license (or other state-issued ID), confirm that the person standing in front of them physically matches their credentials, and then enters their *full legal name* and *birthdate* into the **Attended Kiosk**. Once their information is entered, an identical sex offender check that was performed at the **Self-Service Kiosk** will be performed at the **Attended Kiosk** for the benefit of your operator.

Your staff will then be able to review any offender results that match the visitor's *legal name* and *birthdate*. They can evaluate the list of results one-by-one and take appropriate action, depending on whether the match is definitive or not. If the offender match ends up being a false positive, they can continue with the visitor sign in process according to your facility's safety protocols.

For more information on how potential possible sex offenders are handled, search our Support Center using keycode (SO).

Workstation Management

The first time you sign into an **Attended, Express or Self-Service Kiosk** (or the **Admin** interface), you'll want to access its **Workstation Management** settings; these provide you with an easy way to configure, test, and support the printers, scanners, and other peripherals used with KeepnTrack for the current machine and browser.

Workstation Management can also be used to customize **Kiosks** on a station-by-station basis to support only the **Classifications** of people and features that fit your needs; for example, automatic sex offender checks, badge printing, command lines, and the quick links menu.

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

For more information and a list of supported printers, scanners, and label choices, search KeepnTrack's Support Center using keycode (HM).

Hardware & Accessories

We recommend ordering officially supported hardware, accessories, and related products directly from COMPanion. This is your assurance that we have approved and guaranteed the quality of these products; otherwise, you may experience unexpected results or compromised print quality when using unsupported forms or labels.

We offer scanners for both driver's licenses and identification cards, barcode readers for KeepnTrack ID badges, printers for activity labels, and more—all designed to work seamlessly with our software. Please contact our sales department at (800) 347-6439 or by email at sales@keepntrack.com and ask us about our hardware and accessories.



Scanners

- Our high-performance barcode scanners are pre-configured to work with KeepnTrack.
- Advanced LED technology with bright, sharp aiming lines and high resolution imaging.
- Read barcodes quickly and accurately without touching the label.
- 2D scanners for both identification cards and driver's licenses.



Printers

- Our printers are small, fast, and functional—designed for everyday use.
- Clean, quiet, high-speed thermal printing.



Labels **LB**

- Adhesive, color-coded badges made to stand out, easily spot, and enhance security.
- Student Pass paper for tardy slips, early dismissal.
- KeepnTrack ID tag key fobs and wallet cards made of durable plastic.

NOTE:



Please note that our standard report format is PDF; we recommend using the latest version of Adobe's PDF reader to print labels and view reports.

Additional Support

You may contact COMPanion's **Sales** or **Customer Support** departments via phone or email to learn more about KeepnTrack features. Our skilled and knowledgeable staff will be able to answer any technical or software-related questions you may have.

Contact Sales

Phone:
Toll free: 1.800.347.6439
Worldwide: 1.801.943.7277
Fax:
Toll Free: 1.888.515.3883
Worldwide: 1.801.943.7752
Email:
sales@keepntrack.com

Contact Customer Support

Phone:
Toll free: 1.800.320.5830
Worldwide: 1.801.943.7277 (24 hours)
Fax:
Worldwide: 1.801.943.7752
Email:
support@keepntrack.com

KeepnTrack's Online Support Center:

User's Manual: www.keepntrack.com/supportcenter/index.php


Training & Videos


KeepnTrack Support Videos: www.keepntrack.com/supportcenter/index.php/Video_Directory
Training: www.keepntrack.com/support/training/
Tip of the Week: www.keepntrack.com/totw/2009/

Printers & Scanners

Install Guides: www.keepntrack.com/supportcenter/index.php/Install_Guides

Social Media

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 **Follow us on Twitter:** [KeepnTrack @KeepNTrack](https://twitter.com/KeepNTrack)



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