



## GETTING STARTED GUIDE



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Please read this Getting Started Guide carefully prior to setup or use of the KeepnTrack system. If, after reading these instructions, you still have questions, please contact Customer Support at [support@keepntrack.com](mailto:support@keepntrack.com) or (800) 320-5830.

## COMPanion Software Subscription

KeepnTrack databases are hosted on servers that use state-of-the-art hardware for optimal performance and reliability to save you 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 software subscription includes:

- A complimentary DNS name for your school (e.g. [accountname.keepntrack.com](http://accountname.keepntrack.com)).
- Safe and secure (https) communications between you and our servers.
- Specialized staff with tools to monitor performance, connection, and stability 24/7.
- Free upgrades to more advanced, future versions.
- Customer support—24 hours a day, 7 days a week.



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Elements of the KeepnTrack system and related network services are patented or patent pending, both in the United States and internationally.

# PACKING LIST

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## Thank you for choosing KeepnTrack!

You have licensed the following product(s). Should you have any questions, please contact COMPanion Customer Support at 1-800-347-6439 or [support@companioncorp.com](mailto:support@companioncorp.com).

### Core Products

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District Account License  J1001/J1005  
Single Facility Account License  J1015

### Import Services

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Person Import (Standard)  J1001/J1005  
Person Import (Custom)  J1015

### Data Integration Services

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Identity Automation  J4000  
Identity Automation (Custom)  J4001  
Level Data  J910

### Additional Services

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Criminal Background Check  J33

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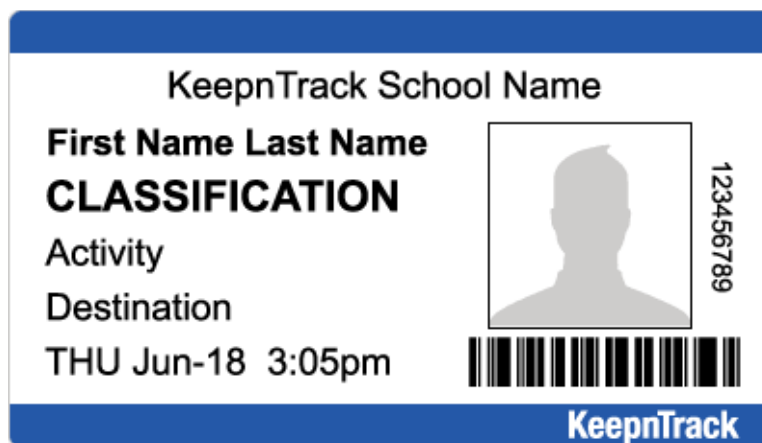
# WELCOME TO KEEPTRACK!

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.

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 preregister volunteers with our integrated, online application.

When a visitor is cleared, KeepnTrack prints a time-stamped badge sticker with the visitor's name, photo, activity they're attending, and a scannable barcode for signout. 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 alert school administrators and can even send notifications to local law enforcement by email or text message.



This guide shows you how to set up your administration and kiosk settings so you can start using KeepnTrack.



**Administration** is where you'll manage and evaluate data in your system. Run reports and utilities, change preferences, and adjust settings to best serve the needs of your organization. Only operators with the proper security permissions have access to this part of the program.



**Kiosks** are what the majority of your students, staff, and visitors will use to sign in and out of activities at your facility. There are three types of kiosks: Attended, Self-Service, and Express.



Throughout this guide, you'll see keycodes like this **KC**. They're handy shortcuts to help you search the Support Center. A full list of keycodes is at the end of the guide.

Let's get started!

## 1 Registration

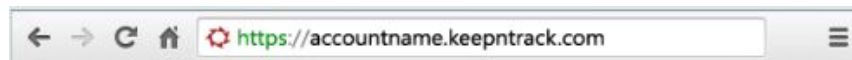
---

KeepnTrack registration is automatic — you don't need to do anything, and we'll get it all set up for you. COMPanion will email you the URL, username, and password required to log in to KeepnTrack for the first time. If it isn't in your inbox, check your spam, junk, or deleted items folders.

## 2 Accessing KeepnTrack

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KeepnTrack interfaces are cross-platform, accessible on both macOS and Windows operating systems using the most recent versions of Chrome, Edge, Firefox, and Safari. To access KeepnTrack, open a browser window and enter your personalized URL into the address bar: <https://accountname.keepntrack.com>



### Bookmark Your Login 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 also create a shortcut to KeepnTrack from your computer desktop: Highlight your KeepnTrack URL or favicon in the address bar and drag it to the desktop to create the link.

Be sure to bookmark the short, simple URL we provided you, and not the longer URL you're routed to after you've logged in.

## 3 Interface Selection

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Before you can log into KeepnTrack, you'll be asked to select a service. The application picker, shown below, is a launchpad from which you can choose which interface to log in to.



## Primary KeepnTrack Modules

You can also access any individual module directly by adding the module name to the end of your login URL in the address bar.

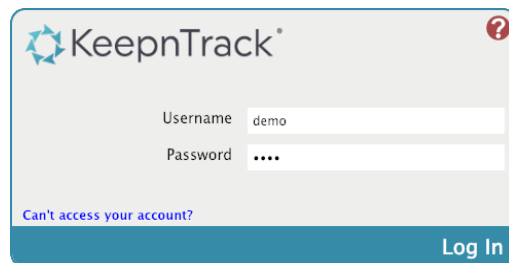
For example, to access the Self-Service kiosk directly, enter <https://accountname.keepntrack.com/selfservice>.

<a href="#">/admin</a>	KeepnTrack's main operator hub.
<a href="#">/people</a>	Manage the users in your system.
<a href="#">/tools</a>	Access the various tools to manage KeepnTrack.
<a href="#">/status</a>	Log in to your own Person account.
<a href="#">/kiosk</a>	Access the Attended kiosk.
<a href="#">/selfservice</a>	Access Self-Service kiosk.
<a href="#">/express</a>	Access Express kiosk.

Visit the [Support Center](#) for a complete list of modules.

## 4 Operator Login and Security

To protect your private information and prevent unauthorized access, a valid username and password are required to access Administration or set up a kiosk. An Account Administrator-level operator with the equivalent security group access has already been created for you. Please review the confirmation email for your login information.




Each operator needs to have their own username and password to access KeepnTrack. The user's security group determines their level of access, which means some operators may not have permission to access certain interfaces or perform some tasks. You'll learn more about security groups on page 12.

Search the Support Center for keycode [MP](#) to learn more about People Management.



Trouble logging in? Contact COMPanion's Customer Support team at (800) 320-5830 for help.

# ADMINISTRATION SETUP AND ORIENTATION

As you explore KeepnTrack, you'll become more familiar with the layout and location of important settings and features. If you want to learn more about the section you're in, click the Help  icon in the top-right corner of the window to open a new browser tab with a Support Center article on that topic.

## Checklist

We recommend configuring Administration settings in the following order:

<input type="checkbox"/> <b>Facilities</b>	Add sites and manage preferences for individual facilities.
<input type="checkbox"/> <b>Preferences</b>	Configure the preferences that determine how KeepnTrack behaves.
<input type="checkbox"/> <b>Security</b>	Modify existing or create custom security groups by manipulating lists of permissions.
<input type="checkbox"/> <b>Operations</b>	Create your system operators and configure their permissions on a case-by-case basis.
<input type="checkbox"/> <b>People</b>	Import person information to KeepnTrack and run criminal and sex offender checks.
<input type="checkbox"/> <b>Activities</b>	Create and customize available activities to your organization.

The next section describes these settings more thoroughly with embedded and referential links to more comprehensive online documentation.



KeepnTrack kiosks are set up and configured on a station-by-station basis so they can be customized to fit your needs at an individual location.



# 1 Administration Modules

While kiosks are the front-end of KeepnTrack system, Administration is the back end. This is where you'll manage all of your people records and system settings. Very few of your users will have access to this section. Look around and familiarize yourself with these modules now, so you can find what you're looking for later.



## About <sup>HT</sup>

This is your starting point. The tabs contain quick-access links to the most commonly used features, online documentation, current operator and account, and more.



## People <sup>MP</sup>

Manage the records for all of the people in your system, including students, staff, teachers, volunteers, and other operators. View and modify existing records or add new ones.



## Tools <sup>MT</sup>

Access a wide range of tools to manage your system. Learn more in the [Support Center](#).

### Tools

- [Reports](#)
- [Utilities](#)
- [Volunteer Verification](#)
- [Export](#)
- [Import](#)
- [Application Picker](#)
- [Preferences](#)
- [Security](#)

### Management

- [Activities](#)
- [Volunteer Applications](#)
- [Facilities](#)
- [History](#)
- [Operations](#)



## Log Out

When you're done, click here to log out.

Search the Support Center for keycode <sup>AM</sup> to learn more about Administration.

# 2 Facilities

Next, we recommend reviewing your facility information before going any further. Although most of your site information has been entered for you, you'll want to verify that it's accurate and complete. If you're licensed for additional sites, now is a perfect time to add them.

Enter the contact information for each facility. Required fields are marked with an asterisk. Each facility must have a unique Facility ID and a valid email address — this is where volunteer application notifications are sent, among other things.

Licensing restrictions are strictly enforced: **You cannot add more facilities than you have licenses.**

## 3 Preferences

Preferences allow you to modify KeepnTrack's behavior. They're divided in two main categories: those that apply to all of the facilities and those that apply to individual facilities. Click on an icon in one of these categories to view the related settings.

### Account Preferences

An account is the governing entity for a group of facilities, like a school district, in which all of your organization's data is configured and stored. KeepnTrack's account preferences are divided into three sections: Volunteer Approval, Volunteer Applications, and Volunteer Notifications. The settings you choose here will apply to **all** of your facilities.



#### Volunteer Approval

Choose how [Volunteer Applications](#) are handled and processed.



#### Volunteer Applications

Customize various options for the [Volunteer Application](#) process.



#### Volunteer Notifications

Set up how to be notified when applications are received, approved, rejected, and awaiting review.

Search the Support Center for keycode **PT** to learn more about Preferences.

### Facility Preferences

A facility is a single establishment contained within an account, like a school within a school district. Individual facilities have their own local preferences which are grouped into three categories: Kiosk, Alerts, and Enhanced Security. The facility you're working in is named at the top of the screen. The settings you choose will apply only to that facility.



#### Kiosk **KI**

Manage the messages displayed on your kiosks.



#### Alerts

Enter the email addresses and phone numbers of those who should be notified when a potential sex offender attempts to log in to your facility.



#### Enhanced Security **SC**



Choose if a birthdate should be required for someone to sign in, and if kiosk logins should be limited to specific IP addresses.

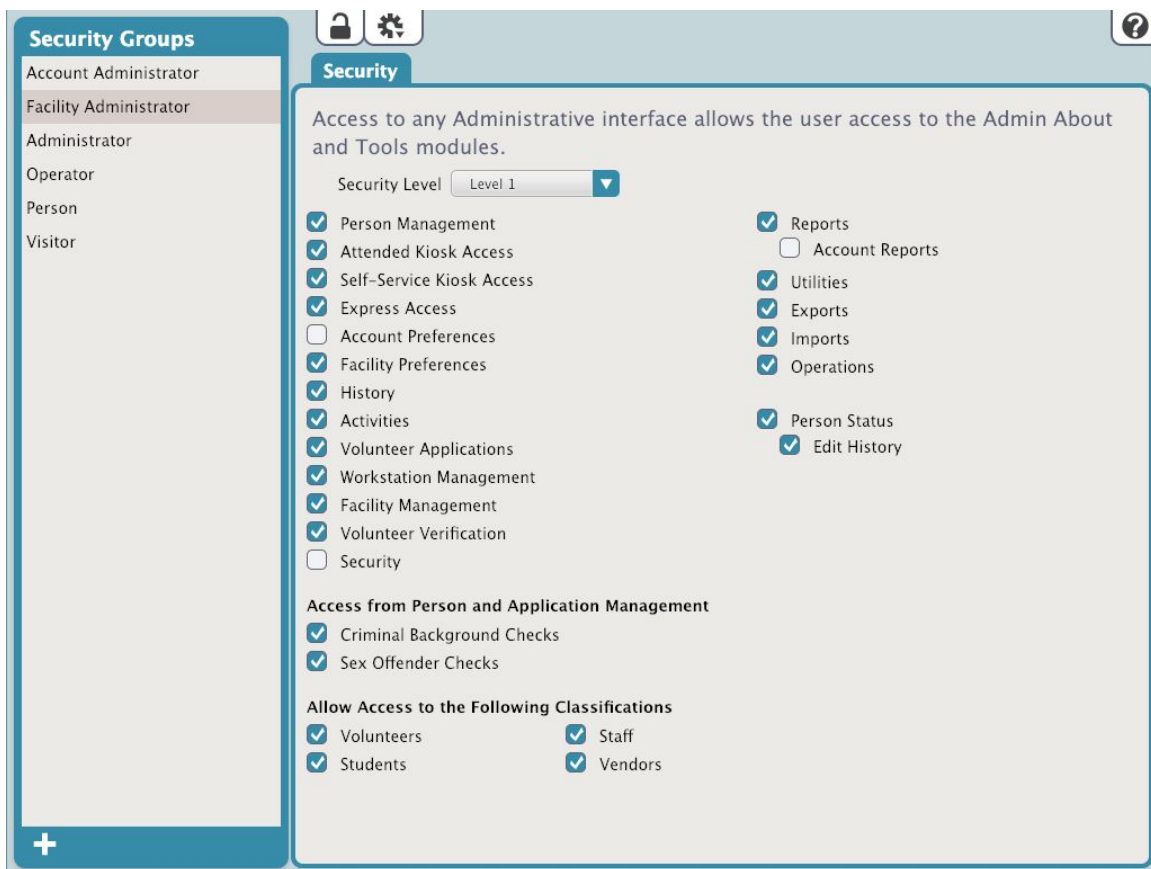
To switch to another facility, click the facilities  icon in the top-right corner of the main Preferences window.

## 4 Security

Next, go to **Tools > Security** to review the default security groups. These security groups determine the level of access the user has to KeepnTrack and actions they're permitted to perform.

The Account Administrator operator, created for you by KeepnTrack 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. It cannot be modified or deleted. However, you can modify other default groups and add your own.

Select a security group on the left to view the default permissions to the right. To modify the default permissions for an existing security group, click the lock  icon at the top of the screen to unlock the module for editing. To add a new security group, click the plus  icon at the bottom-left of the Security Groups pane.



**Security Groups**

- Account Administrator
- Facility Administrator
- Administrator
- Operator
- Person
- Visitor

**Security**

Access to any Administrative interface allows the user access to the Admin About and Tools modules.

Security Level

- Person Management
- Attended Kiosk Access
- Self-Service Kiosk Access
- Express Access
- Account Preferences
- Facility Preferences
- History
- Activities
- Volunteer Applications
- Workstation Management
- Facility Management
- Volunteer Verification
- Security

- Reports
- Account Reports
- Utilities
- Exports
- Imports
- Operations
- Person Status
- Edit History

**Access from Person and Application Management**

- Criminal Background Checks
- Sex Offender Checks

**Allow Access to the Following Classifications**

- Volunteers
- Staff
- Students
- Vendors




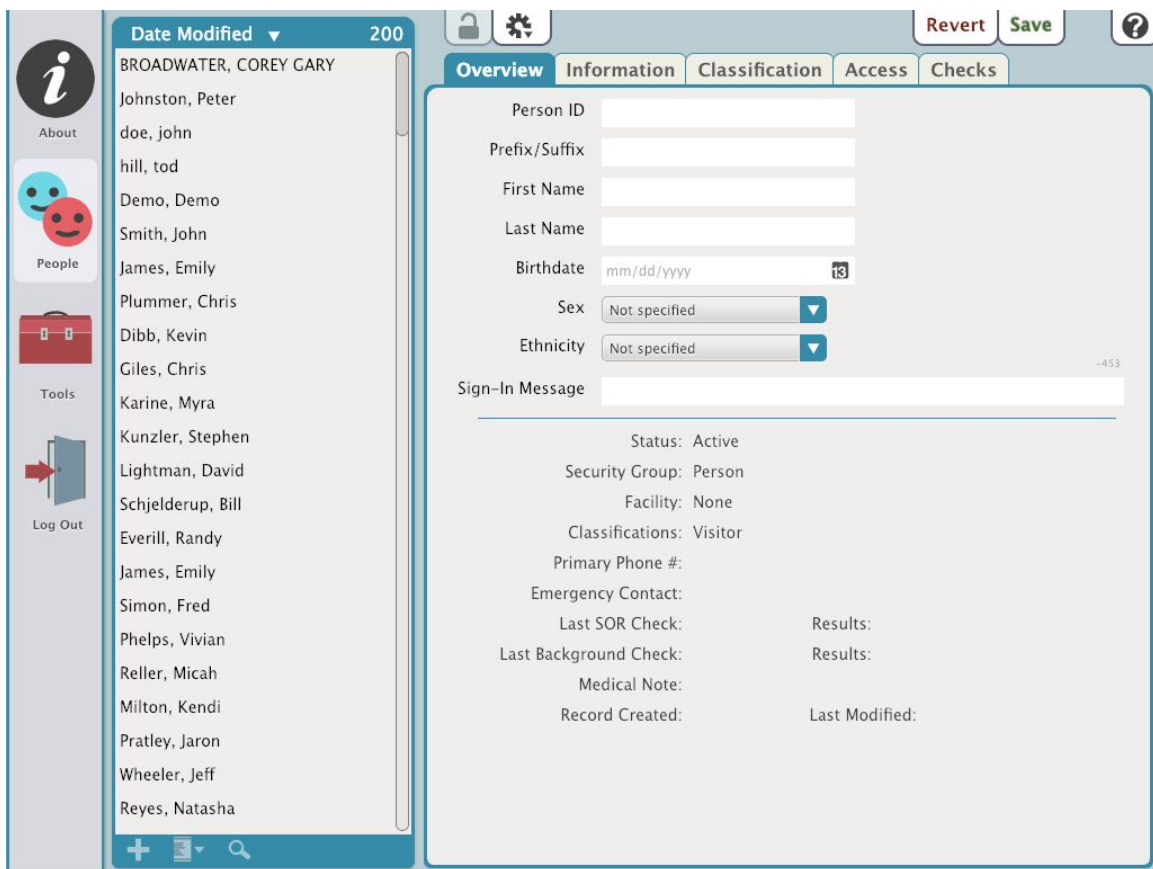
When a new person is added to KeepnTrack, they're assigned to the Person security group by default. If you need to update their security group to one that grants more appropriate permissions, like you would need to do for an operator or administrator, you can do that in **People > Access**.

## 5 Add Operators


Next, we recommend creating additional operators with more restrictive permissions to help manage your facilities. KeepnTrack operators are people assigned to an Operator or Administrator security group.

The very first operators you should create are your Facility Administrators and other Administrators with the equivalent security group access. By default, operators have access to kiosks and sex offender checks. However, these settings can be modified to allow more or less access to fit the needs of your facility.

Go to **People Management**. Click the Actions  menu at the top of the screen, then choose **Add Person**. Fill out the information on each tab of the new record as completely as possible. In the Access tab, choose a Security Group based on the type of access you want to give, choose their classification(s), and be sure to enter a username and password so they can log in.



The screenshot displays the 'Add Person' form in the KeepnTrack People Management interface. The interface includes a sidebar with navigation options: 'About', 'People', 'Tools', and 'Log Out'. The main content area is divided into tabs: 'Overview', 'Information', 'Classification', 'Access', and 'Checks'. The 'Information' tab is active, showing fields for Person ID, Prefix/Suffix, First Name, Last Name, Birthdate (with a date picker), Sex (dropdown), and Ethnicity (dropdown). Below these fields is a 'Sign-In Message' text area. The 'Overview' tab shows the following details: Status: Active, Security Group: Person, Facility: None, Classifications: Visitor, Primary Phone #: [empty], Emergency Contact: [empty], Last SOR Check: [empty], Results: [empty], Last Background Check: [empty], Results: [empty], Medical Note: [empty], Record Created: [empty], and Last Modified: [empty]. The top right of the form has 'Revert' and 'Save' buttons, and a help icon. The top left shows 'Date Modified' and '200'.

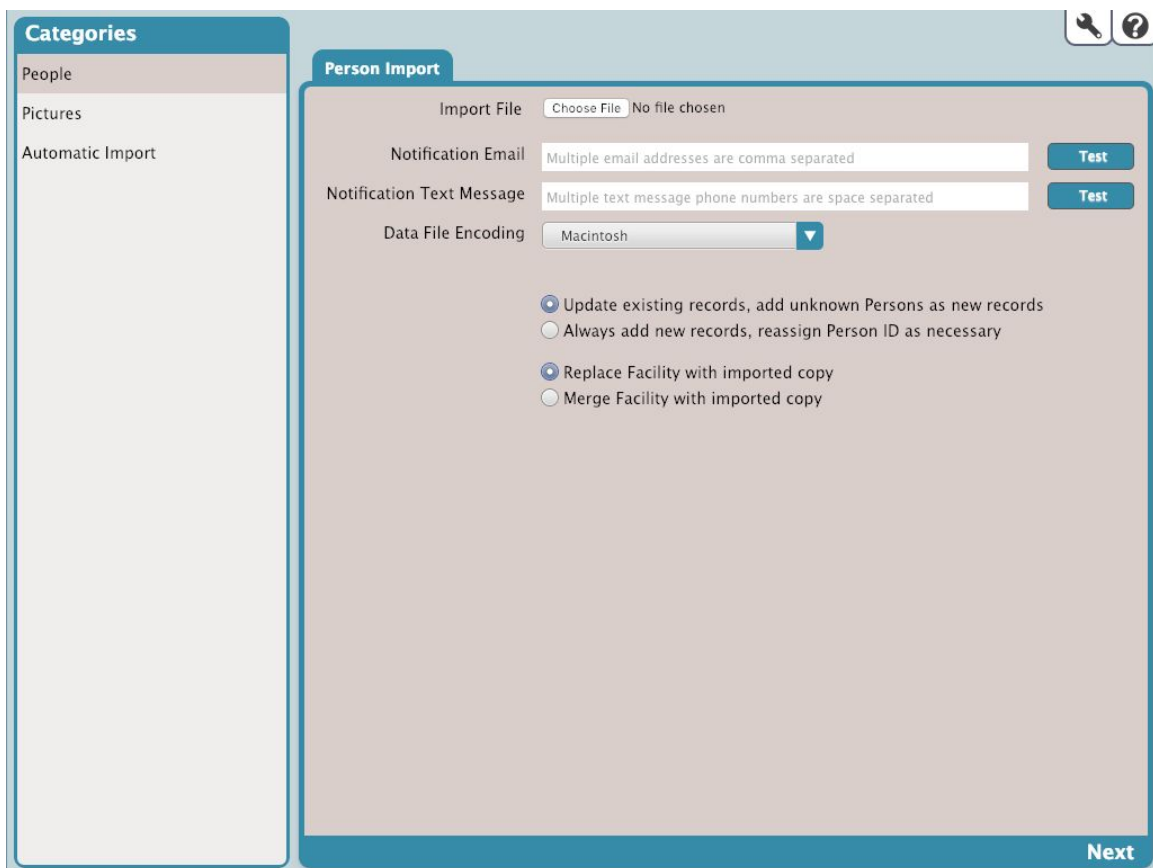
Search the Support Center for  to learn more about adding operators.

## 6 Import Students and Staff

Once you've added a few operators, it's time to add the people who visit or attend your facilities. You can add new people and operator records *manually* in People Management, as described above, or you can import records from an existing data source.

KeepnTrack can import Person data from any source capable of outputting text files in a tab-delimited format. And with our FTP import functionality, an entire student or staff database can be stored in a central location and then KeepnTrack, once configured, can perform bulk uploads of add or update records as they're available.


Files from a Student Information System (SIS) can be used to import basic information, like the person's name and address, and even their username and password. Check with your district or front office to find out if your user data is stored in a machine-readable format.



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

- Import File:** A button labeled 'Choose File' and the text 'No file chosen'.
- Notification Email:** A text input field with the placeholder text 'Multiple email addresses are comma separated' and a 'Test' button.
- Notification Text Message:** A text input field with the placeholder text '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 main configuration area.

Search the Support Center for  to learn more about automatic imports.

## 7 Create Activities

Go to **Tools > Activities** to view, add, and modify all of the traceable events that occur in or around your facility. Activities can be anything from assemblies, field trips, and community service, to dental appointments, guidance counseling, and sporting events.

There are three types of activities: Timed Activity (e.g. classroom volunteer); Untimed, Sign-In (e.g. Late Arrival); and Untimed, Sign-Out (e.g. Early Dismissal). For each activity, you can choose the facility it belongs to, the user classification it applies to, and enter details about the activity itself.

The screenshot displays the 'Activities' management interface. On the left, a table lists various activities with columns for Activity Name, Facility, Classification, and Status. The 'Club' activity is highlighted. On the right, the 'Details' panel for the 'Club' activity is shown, featuring dropdown menus for Status (Active), Facility (Account), and Classification (Student), along with text input fields for Activity Name (Club), Minutes Awarded (0), Effective Date, and Expiration Date. There are also checkboxes for 'Show on Application' and 'Show on Kiosk'.

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
<b>Club</b>	<b>Account</b>	<b>Student</b>	<b>Active</b>
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
Sales Call	Account	Vendor	Active

**Details** Destinations

Status: Active

Facility: Account

Classification: Student

Activity Name: Club

Minutes Awarded: 0

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: Timed Activity

Description:

Notes Label in Kiosk:

Show on Application:

Show on Kiosk:

Search the Support Center for keycode [MA](#) to learn more about managing Activities.

# KEEPNTRACK KIOSKS

Now that Administration has been set up, you're ready to set up your kiosks. While Administration is for operators, kiosks are for users. KeepnTrack Kiosks are an easy way for people to sign in and out of your facility.

## 1 Open a Kiosk

Open KeepnTrack in your browser and choose one of the kiosks from the Application Picker. But which one do you choose? That depends on what you need it for.



There are three types of kiosks: Attended, Self-Service, and Express. Despite their different purposes, each kiosk is used the same way and can be set up similarly.



### Attended Kiosk

Depending on how your facility operates, you may require people to sign in and 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 the appropriate action can be taken, including the recording of false positives. We recommend that one or more operators become familiar with the Attended Kiosk so they can run additional security checks when required and help visitors who may struggle with a Self-Service kiosk.

Search the Support Center for keycode  to learn more about the Attended kiosk.



## Self-Service Kiosk

Allow people to sign in or out themselves, without the help of school staff, saving time and resources. The Self-Service kiosk has a simplified interface that facilitates nearly everyone, including visitors who have never signed in before.

However, Self-Service kiosks have no administrative functions, allow for no management decisions, and cannot be used to review potential sex offender matches. When a visitor is flagged, they will be directed to the main office for further processing.

Search the Support Center for keycode **SS** to learn more about the Self-Service kiosk.



## Express Kiosk

The Express kiosk is ideal when a large number of visitors need to sign in or out, like sporting events, concerts, or large school functions. It works best when used with an ID scanner, such as our Universal KeepnTrack Scanner.

The operator will choose the setup options: action (sign in, sign out, or timed sign out), the person classification, activity, and destination, then it's ready to go. Scan the person's ID or enter their name and birth date to continue. Easy peasy. Next!

Search the Support Center for keycode **EK** to learn more about the Express kiosk.

Choose the kiosk you want to set up at this location, and then log in with your username and password.

Next, if you have access to more than one facility, select the facility this kiosk will be set up for. The facilities you have access to are determined by your user record in **People > Access**.

Select a Facility

Search Facilities

This list contains the facilities you can access.


- Adams Middle School (AMS)
- Jefferson Elementary School (JES)
- Washington High School (WHS)

Continue




## 2 Workstation Management

Kiosks are set up and configured individually to fit your needs at that location. Choose which visitor classifications are permitted to use the kiosk, enable sex offender checks, set up the hardware (printers, scanners, and cameras) this kiosk will use, and more.

The first time you sign in to an Attended or Self-Service kiosk on each station, click the Actions  menu and go to Workstation Management. This is where you'll configure and test the settings for your printers, scanners, and other peripherals used with KeepnTrack for the current machine, and set any additional preferences.



Workstation Management settings are saved in your browser. So you should only need to set it up again if you clear the browser cookies (intentionally or unintentionally), open the kiosk in another browser, or move to another station.

Search the Support Center for keycode  to learn more about Workstation Management.

## 3 People Classifications

There are five classifications of people who can access your facilities: Visitor, Volunteer, Student, Staff, and Vendor. When signed in, the user's activities and hours are tracked and can be reported.

<b>Visitor</b>	People who will visit the facility infrequently, such as parents or grandparents.
<b>Volunteer</b>	People who volunteer at the facility.
<b>Student</b>	People who are enrolled at the facility.
<b>Staff</b>	People who work at the facility.
<b>Vendor</b>	People who visit your facility to supply goods or services.

Depending on how your kiosk is set up, users may be asked to supply supplemental job numbers, identification codes, or the make and model of their vehicle to log in. Everyone is required to enter their full legal name and birthdate. Those who are permanently enrolled in your database need only provide their Person ID number or scan their KeepnTrack ID.

Next, KeepnTrack will prompt the user to select the activity they're signing in for. All activities are configured in **Tools > Activities**. See page 12 for more information.

After all information is gathered, the sign-in will either be approved or denied. If approved, the person will be officially signed in to your facility, and a highly visible, self-adhesive name badge will be printed for the visitor to wear while on premises.

## 4 How to Handle a Potential Sex Offender Match

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When a visitor signs in, KeepnTrack can automatically run a behind-the-scenes sex offender check using their full legal name and date of birth. The person's information is screened for matches in a large data repository sourced from national, state, and local agencies — including sex offender registries — which helps reduce false positives. So what happens when a potential match is identified?

### Potential Match from a Self-Service Kiosk

If a visitor signing in to a Self-Service kiosk is flagged as a potential offender, they will be directed to your main office for further evaluation.

### Potential Match from an Attended Kiosk

The operator will take the individual's driver license (or other government-issued photo ID) to confirm that the person standing in front of them matches their credentials, then they'll enter the visitor's full legal name and birthdate into the Attended Kiosk and run another check. The operator will review each potential match and, if it's a false positive, continue with the visitor sign-in process according to your facility's safety protocols.

Search the Support Center for keycode  to learn more about handling potential sex offender matches.

# Hardware and Accessories

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All of our equipment is specifically configured to integrate with KeepnTrack software. We recommend ordering officially supported hardware, accessories, and related products directly from COMPanion for guaranteed quality and optimal performance. For help deciding which scanner or printer is best for your facility, please contact our Sales Department at (800) 347-6439.



## Scanners

Our barcode scanners use advanced LED technology with bright, sharp aiming lines and high resolution imaging to read barcodes quickly and accurately without touching the label or ID card.



## Printers

Print labels, badges, and receipts with our thermal printers. They're small, quiet, and efficient — optimal for every day use.



## Labels

Our adhesive, color-coded badge labels stand out to easily spot and enhance security. They serve as a quick reference to ensure the right people are in the right location on the right day.



Labels are generated in PDF format. We recommend using the most current version of [Adobe Reader](#) to view and print labels, reports, and notices.

# ADDITIONAL SUPPORT

Contact COMPanion's Sales or Customer Support departments via phone or email to learn more about KeepnTrack features. Our skilled and knowledgeable staff can answer any technical questions you may have.

## Contact Sales

### Phone

Toll Free: (800) 347-6439  
Worldwide: (801) 943-7277

### Fax

Toll Free: (888) 515-3883  
Worldwide: (801) 943-7752

### Email

[sales@keepntrack.com](mailto:sales@keepntrack.com)

## Contact Customer Support

### Phone

Toll Free: (800) 320-5830  
Worldwide: (801) 943-7277

### Fax

Worldwide: (801) 943-7752

### Email

[support@keepntrack.com](mailto:support@keepntrack.com)

## Support Center

Visit our Support Center online at <http://support.companioncorp.com/display/KnT/Support> and search for a keycode to learn more about the topic.

- |                               |                                |                                       |
|-------------------------------|--------------------------------|---------------------------------------|
| <b>EK</b> Express Kiosk       | <b>KI</b> Kiosks               | <b>QL</b> Attended Kiosk              |
| <b>EX</b> Export              | <b>LB</b> Printer Installation | <b>RT</b> Reports                     |
| <b>FM</b> Field Mapping       | <b>MA</b> Activities           | <b>SC</b> Security                    |
| <b>FP</b> Facilities          | <b>MP</b> People Management    | <b>SO</b> Sex Offender Registry Check |
| <b>FT</b> Automatic Import    | <b>MT</b> Tools                | <b>SS</b> Self-Service Kiosk          |
| <b>HM</b> Installation Guides | <b>OM</b> Operations           | <b>UT</b> Utilities                   |
| <b>HT</b> Admin               | <b>PT</b> Preferences          | <b>WM</b> Workstation Management      |
| <b>IM</b> Import              |                                |                                       |



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