

History

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KeepnTrack records history whenever a person signs in to or out of a Kiosk. Depending on security settings, administrators or other users with the appropriate security level can edit and create history records manually. This is useful when a person performs an activity when there is no kiosk available, or when they forget to sign in or out.

History records created by signing in to or out of a kiosk

An Administrator can modify the Duration of the activity, and even leave notes describing the reason for the modification. Transaction Date is editable. Duration is what actually counts toward both current and lifetime hours so even if a person forgets to sign in or sign out, the Administrator can modify their duration thereby assuring the time spent in the activity is accurate.

Manually created history records

With the right Security Group permissions, an Administrator can manually create a history record in **People > Actions menu > Add Person History**, or a user can add one to their account in **Person Status > History**.

The screenshot displays the KeepnTrack History interface. On the left, a list titled 'Activity Start' shows 17 records. Each record includes a date-time stamp, a classification (e.g., Volunteer, Visitor, Student), and a facility name (e.g., Assembly, Classroom, Cafeteria, Media Center, Education, Main Office, Field Trip, Late Arrival, Mentor, Early Dismissal). The right pane shows a 'History Record' form for a selected record. The form includes fields for Person Name (Natasha Reyes), Classification (Volunteer), Facility (Adams Middle School), Activity Type (Assembly), Destination (No Selections), Transaction Type (Timed), Transaction Start (01/30/2019 09:37 AM), Transaction End (01/30/2019 09:42 AM), Duration (Minutes) (4), Badge# (0), Job#, Kiosk Notes, and Modification Notes. The form is labeled 'Standard History Record' at the bottom right.

Activity Start Date/Time

This is basically a list that contains the names of your users, their classification, activity type and activity start date; used for browsing person history records and other related tools. Select an item in this field to view or edit its history record on the right.

Quick View

View a list of activities for:

- Facility Most Recent
- Facility Most Recent-Volunteers
- Facility Most Recent-Students

Search

Select an entry from the Activity Start Date/Time list will show the corresponding record in the History Record tab.

First Name

Enter all or part of a first name.

Last Name

Enter all or part of a last name.

Facility

Choose which facility to search. If nothing is selected, it will default to *Any*.

Classification

Drop down that will shows Staff, Student, Vendor, Visitor or Volunteer. If nothing is selected, it will default to *Any*.

Activity Type

Enter all or part of an Activity.

Transaction Start From

This search parameter cannot be left blank. If no selection is made, it will default to 30 days prior to today.

Transaction Start Through

This search parameter cannot be left blank. If no selection is made, it will default to the current day and time.

Duration (Minutes)

Search by Duration. These fields accept numeric values only, between 0 and 1440.

Badge

Search for a Badge # or Job #.

Student ID

Search by *Student ID, Family ID, Person ID, Staff ID, Bus Number, Grade, Homeroom, Staff Type, Teacher, or Volunteer Type*.

Record Type

Choose to search for a specific record type: *Manually Entered History Record, Manually Modified History Record, or Standard History Record*. If no selection is made, this field defaults to *Any*.

Current Record

The Current Record pane is on the right. It provides access to the information stored in the history record selected from the Activity Start Date/Time on the left.



Click  to unlock the record for editing.

History Record

Person Name

This non-editable field displays the first and last name of the currently selected person.

Classification

If this person has multiple classification types (e.g. Staff and Volunteer) designated in Personal Info, use this drop-down menu to select which classification type to apply to the history record.

Facility

Next, select the facility for which the new history allegedly took place. Once this selection is made, the rest of the Edit History dialog becomes available, allowing you to provide more information for the new history record. Facilities are created and maintained in the Facility Information preferences.

Activity Type

Activities are the traceable events that happen in or around your facility. The activities that appear in this drop-down menu are created and stored in Tools > Activities > Details.

Destination

A destination is a sub-category of the main activity type. For example, if you have an activity named "Classroom", a possible destination could be "Mr. Johnston"—the teacher in charge of the class. Destinations are optional and are created and stored per activity in Tools > Activities > Destinations.

Transaction Type

This is a non-editable field that displays either Timed or Untimed.

Transaction Start

This is an editable field that displays the YYYY-MM-DD date and time the person checked in to an activity using the Kiosk. For example, *2018-09-24 11:45 AM*.

Transaction End

This editable field displays the YYYY-MM-DD date and time the person checked out of an activity using the Kiosk. For example, *2018-09-24 12:15 PM*.

Duration (Minutes)

After supplying the Activity Start Time/Date and Activity End Time/Date, this non-editable field tallies the total time spent at the activity in minutes.

Badge Number

When a person signs in to an activity, KeepnTrack generates a one-time use barcode for use with our self-adhesive badges. This barcode, or "badge number", can later be used to sign out of the activity using the Kiosk. Since these badge numbers are unique, they can be referenced again in the future. This non-editable Badge Number field displays this Kiosk-generated barcode number.

Please keep in mind, however, that a badge number isn't generated for manually created history records and will appear blank.

Job Number

Use this field to assign an optional job number to this person for an activity—primarily for Staff and Vendor to enter either government—required ticket or invoice numbers corresponding with their visit (e.g. the district Staff repair person working at your facility may have been assigned a job number).

Kiosk Notes

This field is a display for notes made at the kiosk during check in.

Modification Notes

This is an editable field that the operator can use to add a note regarding changes made to the record.

Change Log

This tab contains a log for each time the selected History Record was modified.