Beginning-of-Year Procedures

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Prepare for a smooth start to the new school year with KeepnTrack by following these steps.

1. Remove old records

Clear out old, unused people records so they don't clog your lists and slow things down. Once you navigate to **Tools > Utilities > Remove Person Records**, there are three common ways to clear out old records:

- Remove all of your visitors by checking the **Exact Classification Selection** box. Then make sure that *all* of the classification types are unchecked. This will just remove people who are only visitors.
- Remove people with an inactive status by selecting **Inactive** in the **Status** drop-down menu.
- Remove people who have expired by filling out the **Expiration Date** selection. The utility will remove everyone who expired during the date range you enter. Also, check the **Exact Classification Selection** box and the relevant classification(s) so that you don't accidentally remove people with multiple classifications.

Once you have chosen the option(s) that works best for you and made the necessary selections shown above, click **Run Utility**.

2. Import new records

If you get exports from your student information system (SIS), you'll want to import those records into KeepnTrack. Refresh your memory on how to do that by reading over our Import article.

3. Process volunteer applications

Get those volunteers ready for the new year! Unless you automatically approve or reject volunteer applications, you'll need to manually screen your applicants. Read about the Volunteer Application Management window to learn how to do this.

4. Check your alert preferences

Things change and people move around between school years. That's why it's important to make sure all contact information for alerts is correct. Go to **Tools > Preferences > Alerts** and double check that the phone numbers and emails listed are current for people who need to be notified. If you alert campus security, you might want to remind them about KeepnTrack so they remember where these alerts are coming from!

5. Check your hardware

Test your printers and scanners to make sure they're working correctly. This will prevent problems when people are trying to sign in and get their badges!

6. Check your kiosks

For each separate kiosk machine, review your Workstation settings to ensure sign-in processes run as expected. Sometimes your workstation settings will also be cleared if browser data is cleared, so it's important to check.

7. Train everyone on KeepnTrack

Whether you are brand new to KeepnTrack or just need a quick refresher after summer break, it's a good idea to make sure you and your team understand the software workflows and facility policies. In addition to the general Support Center, there are a number of great training resources for both new users and those who just need to brush up: Training and Installation Guides, video tutorials, one-on-one training, and free webinars.