

Activities

Contents

Activities



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The Activities page is where you create, locate, customize, and even permanently delete the timed, untimed, or preferred activities and destinations available to people on the Kiosk during sign in or on volunteer applications.

Activities are the traceable events that happen in or around your facility; they can be anything from assemblies, field trips, and community service to dental appointments, guidance counseling, and sports events. The people who work at or volunteer for these events at your facility can be monitored and their total time recorded.

Each Activity is assigned a default Classification (i.e. Staff, Student, Vendor, Visitor, or Volunteer) that KeepnTrack then uses to group people together in order to create comprehensive reports for each event. In other words, a Classification is used to help define groups of people who attend the events or activities in your system.

There are three types of activities:

- **Timed** activities have recorded stop and start times, and the time between the two events is recorded as the total time for that activity. Timed events also include the date and time that the activity was initiated and concluded.
- **Untimed, Sign In** activities simply record the date and time that an activity was initiated, but do not tally the total time spent. Further, untimed sign-in activities do not require a sign-out of the same activity to be complete and untimed. An example of an untimed activity would be "Student, Late Arrival"; this activity would only have an expectation of when a student arrived but does not expect a sign out or a duration to be recorded.
- **Untimed, Sign Out** activities simply record the date and time that an activity was concluded, but do not record when it began or tally the time in between. Further, untimed sign-out activities do not require a sign-in.

Navigation

The Activities module consists of two areas:

Records List

The left hand side of the Activities tab belongs to the Records List which is basically a list that contains the names of your activities, the facility in which the activity will be occurring, their classification, and the current status of the activity. In short, it is used for browsing activity records and other related tools. You may select (highlight) any of the users in this field in order to edit or completely remove their activity information.

Current Record

The right hand portion of the Activities tab consists of the Current Activities Record pane where the selected activities record is displayed, in full, along with associated tools that help perform operations on said record.



Click  to unlock the page for editing.

The screenshot shows the 'Tools Activities' tab. On the left is the 'Records List' with a table of activity records. At the top of this list is a 'Sort By:' dropdown menu currently set to 'Name'. Below the list are a plus icon and a magnifying glass icon. On the right is the 'Current Record pane' with two tabs: 'Details' (selected) and 'Destinations'. The 'Details' tab contains various fields for editing a record, including dropdowns for Status, Facility, and Classification, text boxes for Activity Name, Minutes Awarded, Effective Date, and Expiration Date, and dropdowns for Notes on Kiosk Sign In/Out, Print Format, and Transaction Type. There are also checkboxes for 'Show on Application' and 'Show on Kiosk'.

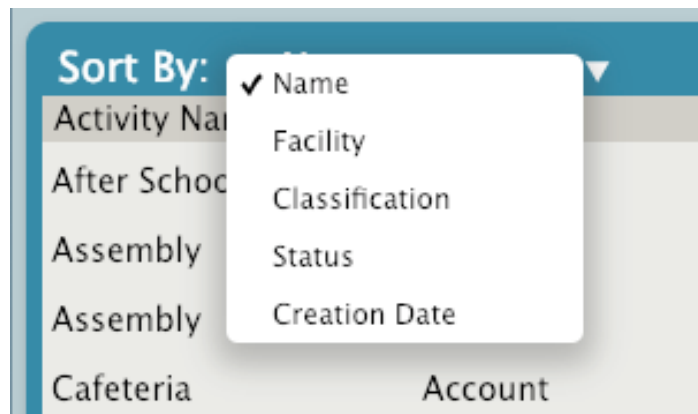
Activity Name	Facility	Classification	Status
After School	Account	Volunteer	Active
Assembly	Account	Visitor	Active
Assembly	Account	Volunteer	Active
Cafeteria	Account	Visitor	Active
Classroom	Account	Visitor	Active
Classroom	Account	Volunteer	Active
Club	Account	Student	Active
Community Service	Account	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

Records List

The left hand side of the window contains the Records List, where all activity records matching your Find criteria will be displayed. The order in which the information is sorted and displayed can be changed by clicking the Sort By menu. The default selection will be the most recently modified.

Selecting an entry from the Records List will make that activity record current in the Current Record pane (i.e. the right—hand section of the **Tools Activities** tab).

Sort By



Tools



Add an activity record to the database.



Search the database for an activity record.

Current Record Pane

The right half of the **Tools Activities** tab is dedicated to the Current Record pane, which provides access to the information stored in the activity record selected from the Records List on the left. The tertiary tabs that are available in the Current Record pane contain the settings, options, editable fields, drop—down menus, and checkboxes used to manage activity records.

Activities Management tabs

The **Tools > Activities** tertiary tabs contain pertinent information for each activity record.

- **Details**
- **Destinations**

Activities Management Control Strip

The control strip at the top of Current Record pane contains the Save and Revert buttons, the Actions and the Support Center help icons, the Lock /Unlock icon.



i The **Save** and **Revert** buttons are conditional and only appear when a changes have been made to various fields in an activity record.

Unlock / Lock

The Unlock / Lock means that before records can be modified, they must first be unlocked. This prevents an operator from making unintentional changes to the currently selected record. For example, the default state of the **Tools Activities** tab is "locked". When locked, records can be viewed but not edited. The **Tools Activities** tab—and all corresponding tertiary tabs—will remain unlocked until you click the lock icon again or the window is closed.

Actions

KeepnTrack's Actions is where you can add a New Activity, Delete Activity, Delete All Expired Activities or Duplicate Activity.



Online Support Center

Click the Help button to access a corresponding section of our online Support Center.

Details

There are two types of activities: Account and Facility. This is determined by the Facility setting detailed below.

An Account activity that shares the same (case sensitive) name as one of your selected Facility (e.g. COMPAnion Elementary School) activities will have their Destinations and other activity information (Classification, Transaction Type, Minutes Awarded, Badge or Slip Printer, etc.) consolidated for presentation on the Attended, Express, or Self-Service Kiosk; information or duplicate names (e.g. Destination) are always taken first from the Facility activity.

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

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

☒

Status

When an activity is set to Inactive, it no longer appears as a selectable option from the Kiosk.

Facility

This determines whether an activity is considered Account or Facility. If you have multiple facilities in your account, you can use this drop-down menu to select the facility for which this activity applies (e.g. COMPAnion Elementary School). Otherwise, select Account for it to appear globally across-the-board.

Classification

Select the classification type (e.g. Volunteer, Student, Staff, Vendor, or Visitor) for which this activity applies; if Active, it will be available in the corresponding classification section of the Kiosk during sign in.

- **Volunteer Activities**
 - A few examples include: Assembly, cafeteria, field trip, main office, tutor
- **Student Activities**
 - A few examples include: Assembly, Community Service, Detention
- **Staff Activities**
 - A few examples include: Classroom, Guidance, Main Office
- **Vendor Activities**
 - A few examples include: Maintenance, Delivery
- **Visitor Activities**
 - A few examples include: Assembly, After School Activity, Field Trip

Activity Name

Provide the name of the main activity in this field (e.g. PTA, Sports, Performance).

Minutes Awarded

Typically used for untimed activities, this value is provided in place of the *true*, and potentially *unknown*, visitor/volunteer duration. For example, when a volunteer *signs in* to an after—school activity for which they are not able to *sign out*, the Minutes Awarded value ensures they still receive credit for volunteer hours. The Minutes Awarded are added to each classification's total credited hours. If this value is set to 0, they not be awarded any minutes for untimed activities.

Notes on Kiosk Sign In

Use this for an optional Notes field to appear on the Attended, Express, or Self—Service Kiosk during the Select Activity stage of *sign in*.

- If Do Not Show Notes Field is selected, then the Notes field will not appear during Kiosk sign in.

- If you select the Show Notes Field, then the Notes field will appear, but the user will *not* be required to enter any information in order to continue.
- If you select the Require Notes Field then the Notes field will appear and visitors *will* be required to supply information in order to continue; the information solicited depends upon the Notes Label in Kiosk.
- Remember, Untimed, Sign In and Untimed, Sign Out do not follow standard *sign in* procedures and, therefore, will not provide the Notes field. The contents of these Notes fields can appear in the Activity Details report.

Notes on Kiosk Sign Out

Use this for an optional Notes field to appear on the Attended, Express, or Self—Service Kiosk during the Select Activity stage of *sign in*.

- If the *Do Not Show Notes Field* is selected, then the Notes field will *not* appear during Kiosk *sign out*.
- If you select the Show Notes Field, then the Notes field will appear, but the user will *not* be required to enter any information in order to continue.
- If you select the Require Notes Field then the Notes field will appear and visitors *will* be required to supply information in order to continue; the information required depends upon the Notes Label in Kiosk.
- Remember, Untimed, Sign In and Untimed, Sign Out do not follow standard *sign in* procedures and, therefore, will not provide the Notes field. The contents of these Notes fields can appear in the Activity Details report.

Effective Date

Use this datepicker to set the *starting* date for the selected activity. If the current date is *before* the activity's scheduled date range, it will not appear in the Kiosk.

Expiration Date

Use this datepicker to set the *ending* date for the selected activity. If the current date is *past* the activity's scheduled date range, it will no longer appear in the Kiosk.

Print Format

Select the print format (e.g. Badge, Slip, and None) for this activity; however, it's your [Workstation Management](#) settings that determine *which* printer to use for selected activity, including roll selection (i.e. *default*, *left*, or *right*).

Transaction Type

Select whether this activity is a Timed Activity, Untimed, display under Sign-In or Untimed, display under Sign-Out. More information on Timed and Untimed activities can be found [here](#).

Description

If needed, a more detailed description of the activity can be provided here; this helps ensure that the activity is reasonably and explicitly explained. This field is used mainly for reference and does not appear on the Kiosk.

Notes Label in Kiosk

This is where you provide the header that appears above the Notes field in the *sign in/out* section of the Attended, Express, or Self-Service Kiosk. The Notes field will behave differently depending on the Notes on Kiosk Sign In/Out settings (described above). For example, you may solicit (or require) the name of the parent or guardian picking up the student in the Notes field during a Student Early Dismissal activity.

Show on Application

When checked, this Volunteer classification, Account-level activity (and all associated destinations) will appear as selectable activities on the [On line Application](#).

Show on Kiosk

When checked, this activity (and any associated destinations) will appear as possible options on the Kiosk during sign-in.

Destinations

Tools > Activities > Destinations

There are two types of activities: Account and Facility. This is determined by the Site setting in Tools Activities Details.

An Account activity that shares the same (case sensitive) name as one of your selected Facility (e.g. COMPanion Elementary School) activities will have their Destinations and other activity information (i.e. Classification, Transaction Type, Minutes Awarded, Badge or Slip Printer, etc.) consolidated for presentation on the Attended, Express, or Self-Service Kiosk; information or duplicate names (e.g. Destination) are always taken from the Facility activity first.

When you create new (or edit existing) Activities for any Classification type (e.g. Staff, Student, Vendor, Visitor, or Volunteer), you can bestow them optional subcategories called Destinations. For example, "Sports" could be your main activity while "Soccer", "Football", "Swimming", and "Basketball" are the sub-grouped "destinations". Another example would be an activity named "Classroom" with individual teachers (e.g. "Mr Johnston") as the destination(s).

Assigning Destinations to an Activity can reduce visual clutter on the Kiosks (during Sign In) and the Volunteer Application; it allows you to instinctively group activities for clarity when displayed.

If provided, Destinations will be printed below the Activity on visitor identification badges. Additionally, assigning Destinations allows for more detailed tracking and activity reporting.