RAPTOR™
TECHNOLOGIES

Raptor User Guide

Release 6.1.2

Rev. 9.00, 02 December 2017

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Preface

About This Document

Welcome to Raptor Technologies, the nation's leading provider of integrated school safety technologies. Raptor's mission is to protect every child, every school, every day.

The Raptor System is a visitor management system that instantly screens visitors, contractors, guardians and volunteers for sex offender status and custom alerts (such as custodial issues and gang membership), and provides customers with an electronic log of who is in their buildings. The Raptor student management system tracks student tardiness as well as early dismissals, and connects approved guardians with each student.

In addition to visitor management, Raptor provides features that help districts manage their volunteer programs including managing volunteer applications, volunteer portals and volunteer events.

Raptor Reunification®

Raptor Reunification® helps ensure that students are tracked, accounted for, and reunited with their parents or guardians safely and as efficiently as possible during emergency events. The Raptor Reunification System can be implemented as a standalone product or integrated with the Raptor System.

A mobile application designed to specifically meet the needs of teachers, faculty, and administrators in the event of an emergency or crisis is used to communicate with the Raptor System.

When integrated with the Raptor System, users can manage the administrative tasks in Raptor and use the existing records and functionality to link to from the Reunification mobile app.

In this guide, the features that are available with the Raptor Reunification System are indicated by the REU icon.

Raptor Link

Raptor Link provides the ability to integrate a Student Information System (SIS) with the Raptor System. This integration enables unattended synchronization of student, staff and roster data into the Raptor System. This data is then used by Raptor Reunification and the Raptor Student and Staff modules.

In this guide, the features that are available with the Raptor Link feature are indicated by the icon.

History

Document Version	Issue Date	Status	Reason for Change
1.0	11/24/2015	Published	Initial version
2.0	02/05/2016	Published	Added Release 2 Features
3.0	04/01/2016	Published	Added Release 3 Features
4.0	06/03/2016	Published	Added Release 4 Features
5.0	09/12/2016	Published	Added Release 5 Features
6.0	01/06/2017	Published	Added Release 6 Features
7.0	05/05/2017	Published	Added Release 6.1 Features
8.0	08/11/2017	Published	Added Release 6.1.1 Features
9.0	12/02/2017	Published	Added Release 6.1.2 Features

Raptor Log In/Log Out

Raptor offers login options based on your preferences—either log in to the Raptor System directly from your web browser, or use the Clever Portal Instant Login feature, which links your Clever and Raptor user accounts.

If you are using Instant Login, see Clever Instant Log In for instructions.

Raptor Log In

Log in to Raptor using the following procedure:

1. Enter the following URL in your browser to open the Raptor Log In screen:
   https://apps.raptortech.com

2. Enter your assigned **Username** and **Password**, and then click **Log in to Raptor**.

Change Password for First-Time Users

If your district requires users to change their password after the first login, you will be prompted to change your password.

1. Enter a new password in the **Password** field.

> **Note** The password must contain a minimum of 8 characters and must include 1 uppercase character and 1 special character.

2. Re-enter the password in the **Confirm New Password** field.
3. Click **Save New Password**.

Maintenance Notifications

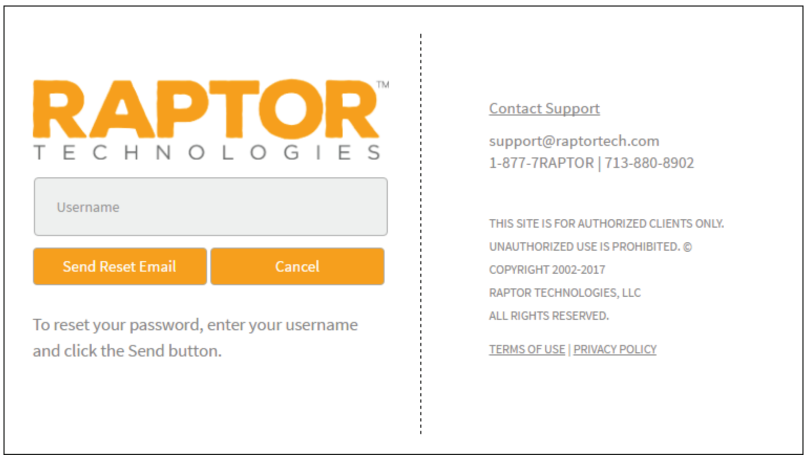
If Raptor is scheduled to perform maintenance on the application, a notification will be displayed when you log in. The date and time the maintenance is scheduled will be listed.

Click **Continue** to complete the login.

Request Forgotten Password

If you have forgotten your password, you can reset your password using the following procedure:

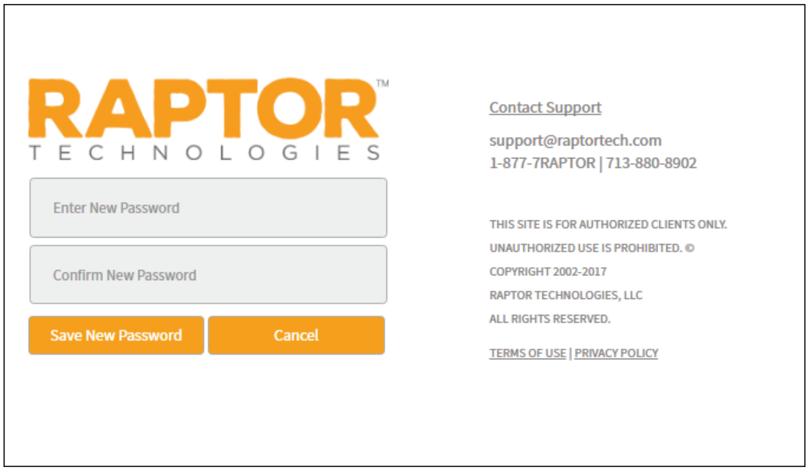
1. On the Raptor Log In screen, select the **Forgot Password** link.



2. Enter your **Username** and then click **Send Reset Email**.
3. Open the email that was sent to you and click the Please click here link to confirm your request and reset your password.

> **Note** The link provided in the email must be used within 20 minutes of being sent or the link will expire and you will need to go through the Send Reset Email process again.

The Password Reset screen displays.



4. Enter a new **Password** and then re-enter to confirm it.
5. Click **Save New Password**.

   The Raptor Log In screen displays with a message indicating your password has been changed. You can now log in to Raptor with your new password.

Request Forgotten Username

If you have forgotten your user name, select the **Forgot Username** link. A message displays informing you that your user name is your email address.

Clever Instant Log In

The Instant Login feature enables Raptor clients to leverage the single sign-on (SSO) capabilities provided by Clever. This feature enables customers, using both Clever and the Raptor system, to log in to the Clever Portal using their existing Clever user credentials, select a Raptor icon within the Portal, and authenticate with the Raptor System.

You can also use Clever Instant Login links to authenticate with the Raptor System instead of using the Clever Portal.

While Clever users are still required to have a Raptor user account for authorization to the many Raptor features, only a single set of credentials is required to access the Raptor System and any other applications integrated through the Clever Instant Login feature.

Prerequisites

The following prerequisites must be met prior to using the Instant Login feature:

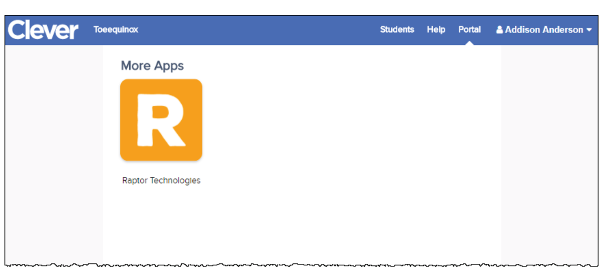
- Clever Instant Login has been configured and tested with the customer's authentication source (for example, Azure, Active Directory, Google, etc.).
- Raptor application settings in Clever have been configured to generate OAuth settings.
- User has created valid and active user accounts in both Clever and the Raptor System.
- Raptor System icon has been configured in the Clever Portal, if the Portal is being used.

Initial Login

The first time a user connects to the Raptor System through Clever Instant Login, the Raptor System does not have the user's Clever ID associated to the Raptor user account. The user accounts must be linked.

Perform the following steps for initial login through Clever:

1. Log in to the Clever Portal and click the **Raptor** icon.



A Raptor login displays informing the user that it was unable to locate a Raptor user account with the corresponding Clever ID.

2. Enter your Raptor **Username** (email address) and **Password**, and then click **Log in to Raptor**.

> **Note** If you have forgotten your Raptor password, click the **Forgot Password** link and follow the instructions in the Request Forgotten Password section.

The Raptor application opens to your landing page.

Subsequent Logins

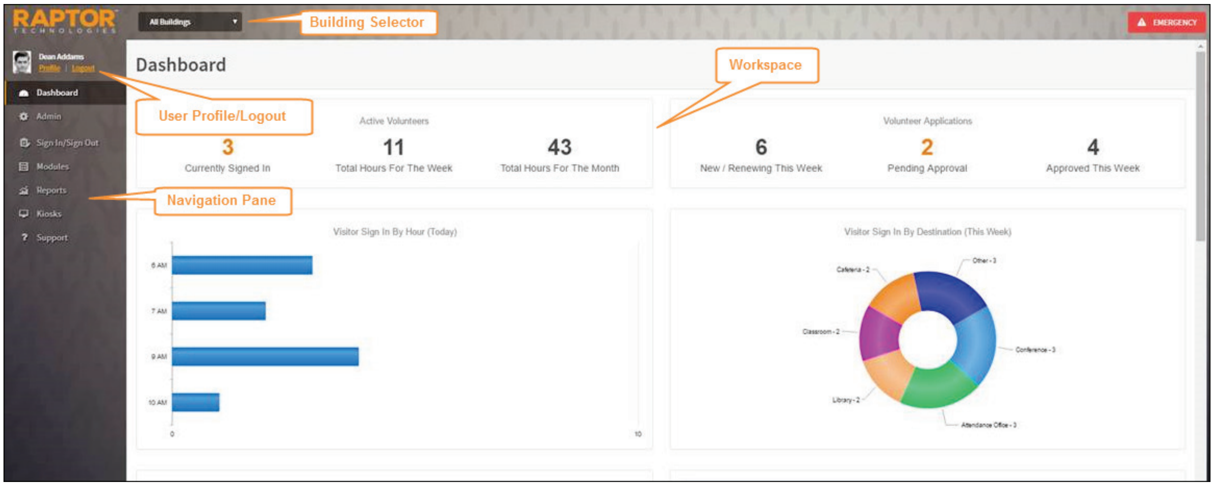
After your credentials are linked, subsequent login to Raptor through the Clever Portal only requires that you click the **Raptor** icon.

Log Out

To log out of Raptor, select the **Logout** link in the upper area of the navigation menu.

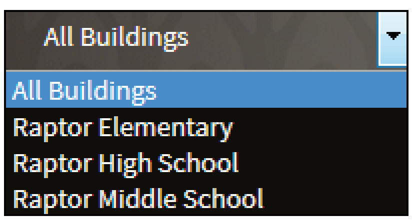
Navigating Raptor

The Raptor user interface consists of the following main elements.



Building Selector

This drop-down menu is used to select the Building for which you are performing tasks.



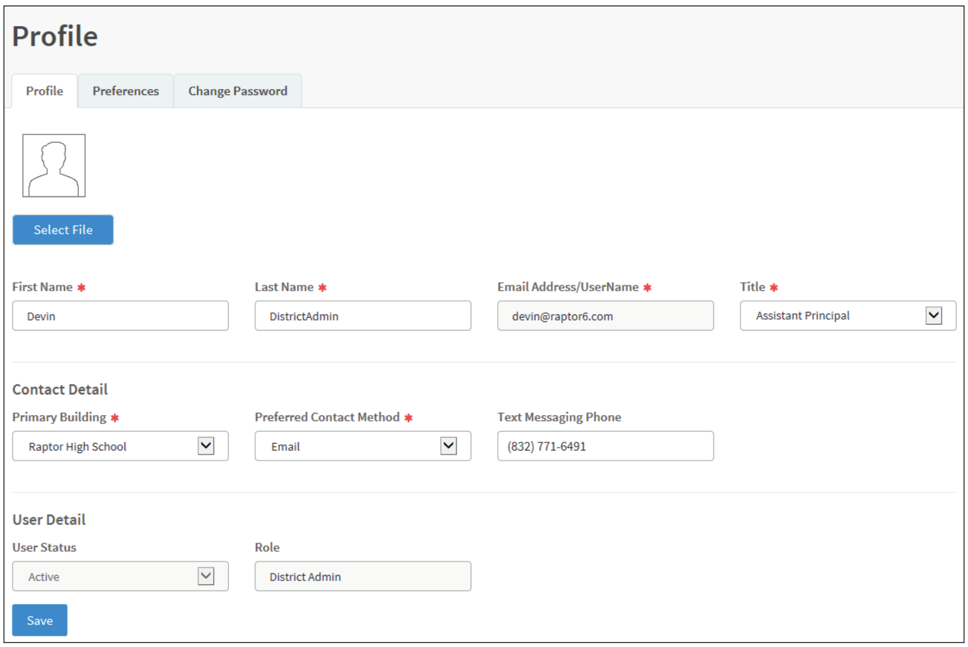
At the Client level (All Buildings), users with administrative permissions can define district policy across module settings which force the buildings associated with that client to use these settings. You can also specify certain drop-down list items, such as Destinations/Reasons, that will be used by all buildings but also allow the individual buildings to add their own custom drop-down list items.

This feature allows a district to specify common items one time for all buildings, instead of having to set up items for each building. However, custom fields created at the Client level (All Buildings) cannot be modified or deleted at the building level, as denoted by the icon in the **Options** column.

User Profile/Logout

This area displays the currently signed in user and links to access their **Profile** and to **Logout** of the application.

You can view and modify your user information using the **Profile** link in the upper left corner of the navigation menu. From the **Profile** workspace, you can upload your photo, update your user information and preferences, edit your contact information (if you have been set up as a contact) and change your password.



Upload Photo and Modify User Profile

From the **Profile** tab, you can upload your photo to display next to your name when you are logged into Raptor.

Upload Photo

1. Select **Profile** in the navigation menu (just below your name).
2. On the **Profile** tab, click **Select File**.
3. On the **File Upload** dialog, navigate to the photo to be uploaded and click **Open**. The photo is uploaded and will now display next to your name when logged into Raptor.

Modify User Information

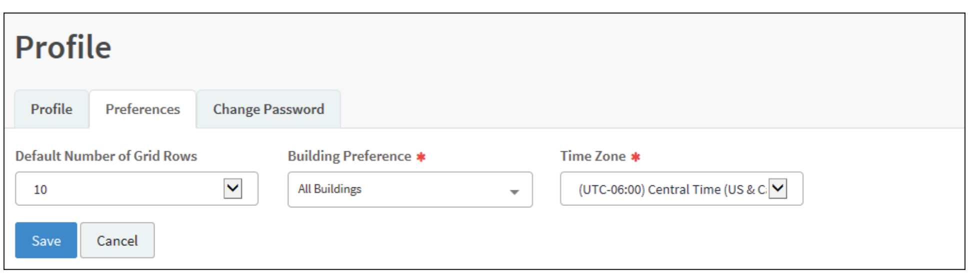
You can update your name and title and view other information that is included in your user profile from the **Profile** tab.

1. Select **Profile** in the navigation menu (just below your name).
2. On the **Profile** tab, modify the information:
   - **First Name** and **Last Name**
   - **Email Address/User Name** – This field is read only and for information only.
   - **Preferred Contact Method** – If you are defined as a contact, you can modify your preferred method of contact. Otherwise, this field does not display.
   - **Title** – Select your title from the drop-down list.
   - **Primary Building** – If you are defined as a contact, you can modify the primary building assigned to your account. Otherwise, this field does not display.
   - **Text Messaging Phone** – If you are defined as a contact, you can modify your phone number to be used for text message notifications. Otherwise, this field does not display.
   - **User Status** – This field is read only and for information only. It shows the user's status.
   - **Role** – This field is read only and for information only. It shows the current role assigned to the user's account.
3. Click **Save**.

Modify User Preferences

The **Preferences** tab on the **Profile** workspace is used to specify certain user preferences.

1. Select **Profile** in the navigation menu (just below your name).
2. Click the **Preferences** tab.

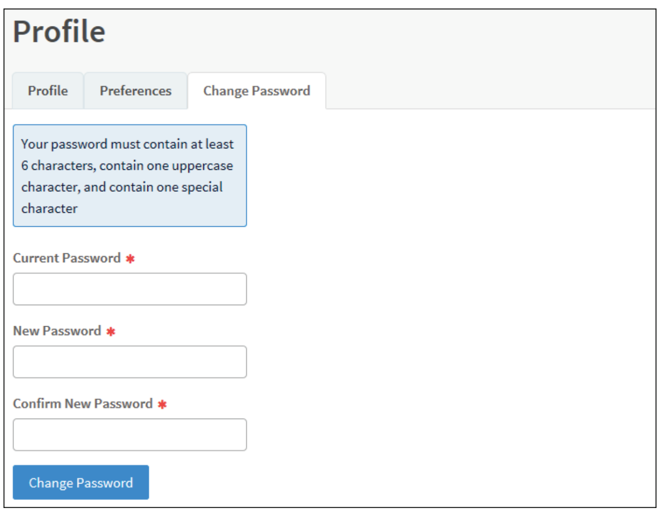


3. You can specify the following information:
   - **Default Number of Grid Rows** – Select the number of grid rows from the drop-down list. This is the default number of rows that displays on each page in the user interface based on the size of your monitor.
   - **Building Preference*** – For users who have access to more than one building, select the building that displays as your default. When you log in to Raptor, this building will display in the Building Selector.
   - **Time Zone*** – Select the time zone for which you would like to view data (typically for customers who have buildings in two or more time zones).
4. Click **Save**.

Change Password

Users can change their password at any time from the **Profile** workspace.

1. Select **Profile** in the navigation menu (just below your name).
2. Click the **Change Password** tab.



3. Enter your **Current Password** in the text field.
4. Enter a **New Password** in the text field and then re-enter it in the **Confirm New Password** field.

> **Note** The password must contain a minimum of 8 characters and must include 1 uppercase character and 1 special character.

5. Click **Change Password**.

Navigation Menu

This area is used to select the workspace in which you want to work. When a menu item is selected in the navigation menu, the workspace displays in the right pane. The Navigation menu contains the following menu items:

- **Dashboard** – Displays up-to-date statistics such as visitor, contractor, student, staff and volunteer sign-in by hour, current day or current week. See Understanding the Dashboard.
- **Admin** – Contains sub-menu items for users with Administrative permissions to set up and manage Raptor.
- **Sign In/Sign Out** – Used to sign in and sign out visitors, contractors, students and staff. See Sign In/Sign Out.
- **Modules** – Contains the sub-menu for each of the enabled modules:
    - **Visitors** – Opens the Visitors workspace where you can manage visitors. View currently signed in visitors, sign out visitors, run visitor reports, view details about all visitors, and access the delayed entry feature from this workspace. See Managing Visitors.
    - **Contractors** – Opens the Contractors workspace where you can manage contractors. View currently signed in contractors, sign out contractors, run contractor reports, view details about all contractors, add contractors, and access the delayed entry feature from this workspace. See Managing Contractors.
    - **Students** – Opens the Students workspace where you can manage students. Run student reports, view details about all students, add students, and access the delayed entry feature from this workspace. See Managing Students.
    - **Staff** – Opens the Staff workspace where you can manage staff. View currently signed in staff, sign out staff, run staff reports, view details about staff, add staff, and access the delayed entry feature from this workspace. See Managing Staff.
    - **Volunteers** – Opens the Volunteers workspace where you can manage volunteers. View currently signed in volunteers, sign out volunteers, run volunteer reports, view details about volunteers, add volunteers, and access the delayed entry feature from this workspace. See Managing Volunteers.
    - **Emergency Management** – Opens the Emergency Management workspace where you can manage drill schedules, monitor drill compliance, record drill planned and completion dates, and view Reunification reports. See Emergency Management.

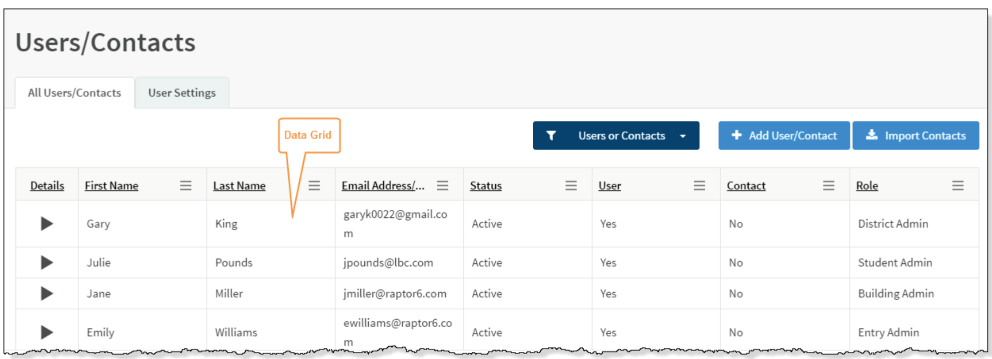
- **Reports** – Opens the Reports workspace where you can run visitor, contractor, student, staff, volunteer, security and reunification reports. See Using Reports.
- **Kiosks** – Launches the Using Kiosks, which provides self-sign in and sign out for students and staff.
- **Support** – Launches the **Raptor Support Center** where you can find Self Help Resources for using Raptor.

Workspace

This area displays in the right pane when a menu item is selected. Upon login, this area displays the Dashboard by default. Depending on the selected menu item, the workspace may contain the following elements.

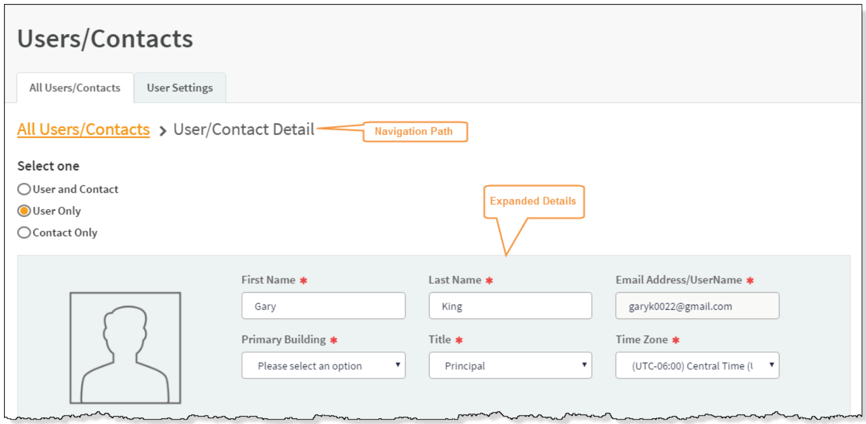
Data Grid

The data grid that displays in a workspace is a table containing information specific to the area on the workspace. For example, in the **Users/Contacts** workspace, the data grid contains a list of all the users set up in Raptor.



Details

To view details of a specific item in the data grid, click the ▶ icon to expand the record.

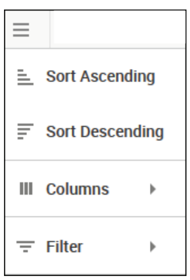


Navigation Path

In each workspace, a navigation path displays indicating where you are in the user interface. To move to a previous workspace, click the link in the navigation path.

Column Menu

The column menu allows you to select which columns display in the data grid and to sort and filter the information.



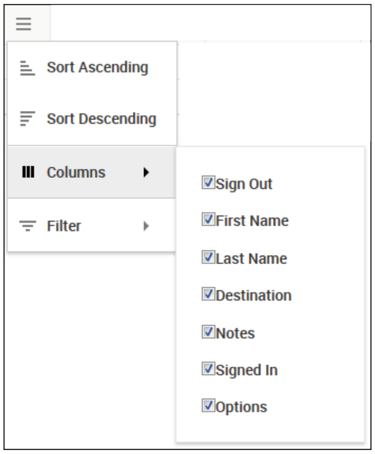
Sort Ascending or Descending

Select **Sort Ascending** to display the information in A to Z order, and **Sort Descending** to display the information in Z to A order.

Columns

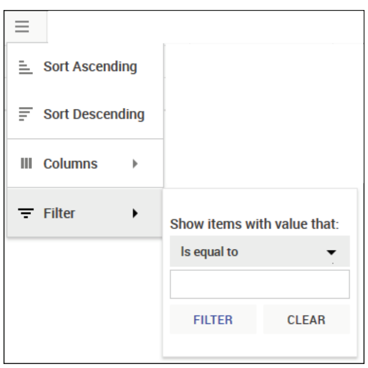
Select **Columns** and then select the check boxes for the columns you want to display. Clear the check box for any column you do not want to display.

Note The available column headings are specific to the workspace.



Filter

To filter the information that displays, select **Filter**, select the operator and enter the filter criteria, and then click **Filter**. Click **Clear** to remove the column filter.



Icons

Icon	Description
	Calendar—Select a date, normally when specifying a date range.
	Clock—Select a time, normally when specifying a time range.
	Cancel—Exit Edit mode without saving your changes.
	Save—Save changes when in Edit mode.
	Delete—Remove an entry.
	Details—Expand an entry or row in the data grid to view the details.
	Edit—Modify an entry.
	Excel—Export a report to Excel format.
	Not Allowed—An invalid entry or changes cannot be implemented.
	PDF—Export a report to PDF format.
	Print—Print a badge.
	Menu—Select columns, and sort and filter information.
	Lock–Indicates an entry is locked and cannot be modified at the building level.
*	Asterisk—Indicates a required field.
REU	Indicates the feature is only available with the Raptor Reunification Module.
	Preview document in PDF format.
	Indicates the feature or field is controlled by Raptor Link.
	Clone—Copy existing item to create new

Understanding the Dashboard

The Dashboard displays on the home screen upon user sign in. It provides a graphical view of up-to-date information on Raptor Link, visitor, contractor, student, staff and volunteer activity. If you hover your cursor over a portion of the graph, a tooltip displays the count for that part of the graph.

The information that displays depends on the user's role and permissions:

- The *Can Run <Module> Reports* permission determines the module related information on the dashboard that the user can see. For example, if the user has the *Can Run Visitor Reports*, they will be able to view visitor statistics on the dashboard.
- The *Can Run System Reports* permission allows you to view the Raptor Link information on the dashboard if you have Raptor Link enabled.

If you do not have either of these permissions, the dashboard is empty.

User Roles with *Can Run <Module> Reports* Permission

The District Admin, Building Admin, Entry Admin and Volunteer Coordinator can view the following information from the dashboard if they have the *Can Run <Module> Reports* permission.

- **Visitor Sign-In By Hour (Today)** – A graphical view of visitor sign-in events by hour for the current day.
- **Visitor Sign-In By Destination (This Week)** – A graphical view of visitor sign-in events based on reason for the current week. The top five reasons are shown, and the remaining reasons display as Other.
- **Visitor Sign-In By Day of Week (This Week)** – A graphical view of visitor sign-in events for each day of the current week.
- **Student Sign-Out By Destination (This Week)** – A graphical view of student sign-out events based on reason. The top five reasons are shown, and the remaining reasons display as Other.
- **Student Sign-In By Day of Week (This Week)** – A graphical view of excused and unexcused sign-in events by day of week.
- **Staff Sign-In By Hour (Today)** – A graphical view of staff sign-in events by hour for the current day.
- **Staff Sign-In By Day of Week (This Week)** – A graphical view of staff sign-in events for each day of the current week.
- **Contractor Sign-In By Hour (Today)** – A graphical view of contractor sign-in events by hour for the current day.

- **Contractor Sign-In By Destination (This Week)** – A graphical view of contractor sign-in events based on reason for the current week. The top five reasons are shown, and the remaining reasons display as Other.
- **Contractor Sign-In By Day of Week (This Week)** – A graphical view of contractor sign-in events for each day of the current week.
- **Active Volunteers** – Displays the number of volunteers currently signed in, total hours for the week, and total hours for the month.
- **Volunteer Applications** – Displays the number of new or renewed volunteer applications that have been submitted for the current week, the number of applications pending approval, and the number of applications that have been approved for the current week.

User Roles with *Can Run System Reports* Permission

Users with the *Can Run System Reports* permission can view the following information on the dashboard:

- **Raptor Link Status** – Displays the status of Raptor Link, and total number of active students and staff members defined in Raptor.
- **Raptor Link Data Sync Status** – Displays the last ten Raptor Link data synchronizations; each data sync entry provides a link to summary and detailed log information.

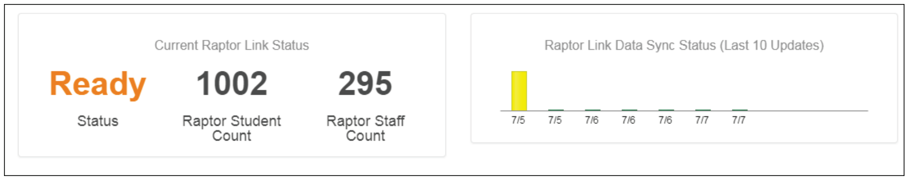
Users with Student Admin Role

The Student Admin can view the following information from the dashboard:

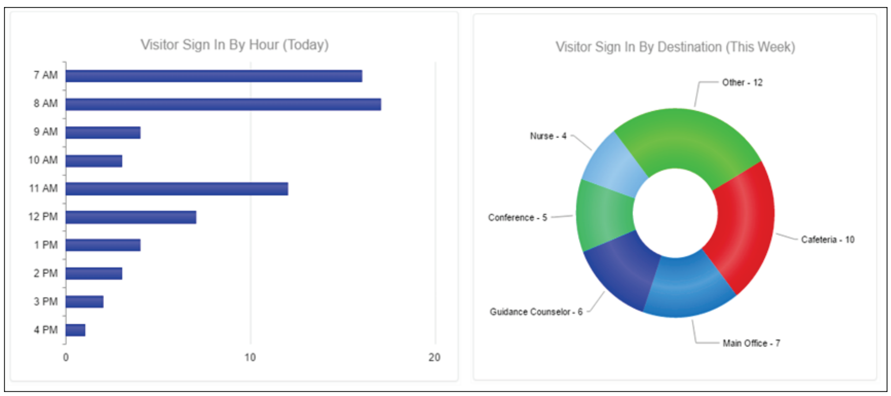
- **Student Sign-Out By Destination (This Week)** – A graphical view of student sign-out events based on reason. The top five reasons are shown, and the remaining reasons display as Other.
- **Student Sign-In By Day of Week (This Week)** – A graphical view of excused and unexcused sign-in events by day of week.

Dashboards

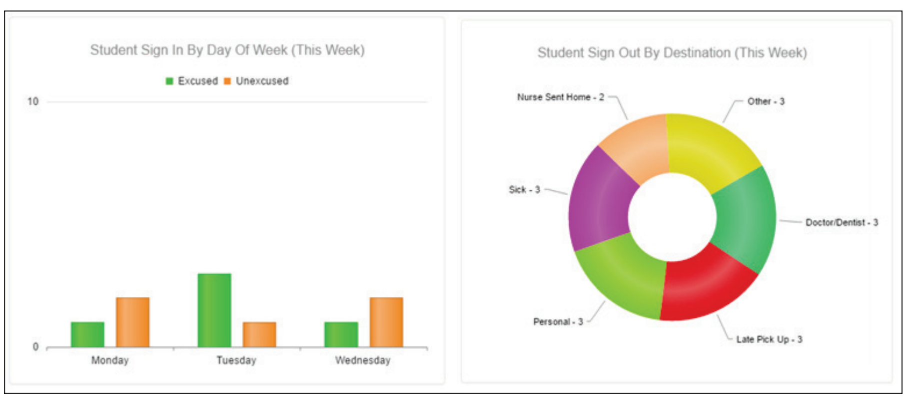
Raptor Link



Visitor Dashboard

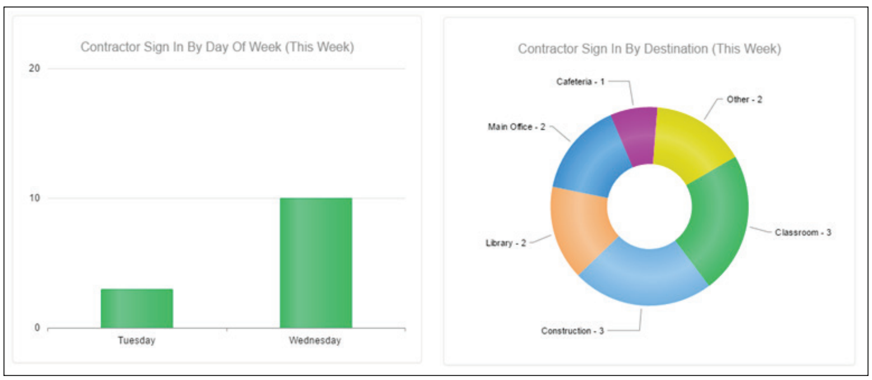


Student Dashboard

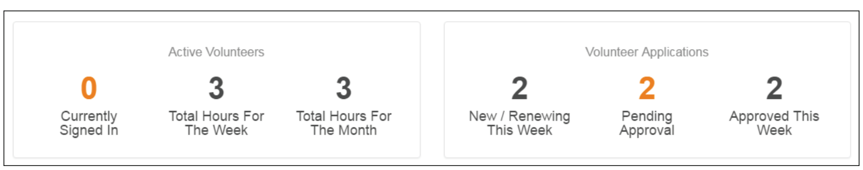


Staff Dashboard

Contractor Dashboard



Volunteer Dashboard



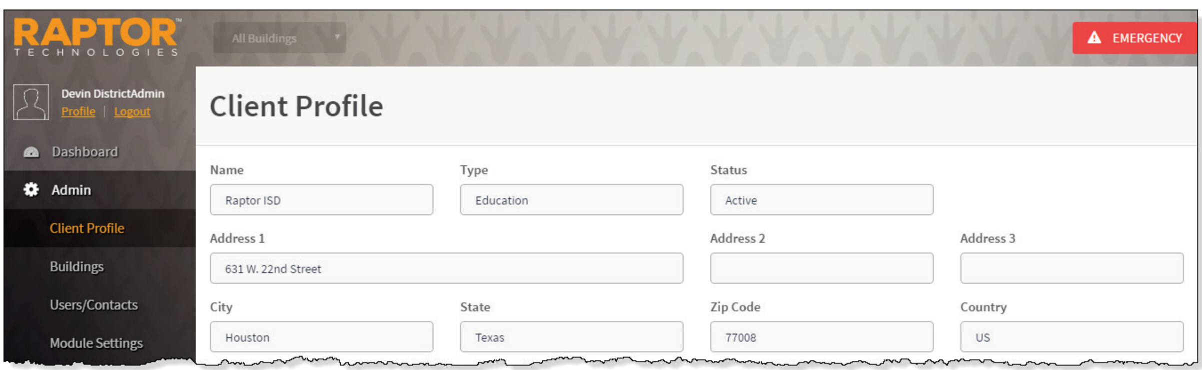
Viewing Client Information (Admin)

Users with Administrative permissions can view client information using these areas of the Raptor user interface under the **Admin** menu:

- The Client Profile and Building Profile workspaces enable users with Administrative permissions to view the information on file in the Raptor system.
- The Buildings workspace is only visible to District Admins to view information about the buildings in their district that are in the Raptor system.
- The Logs workspace enables users with Administrative permissions to view the logged information of activity in the Raptor system.

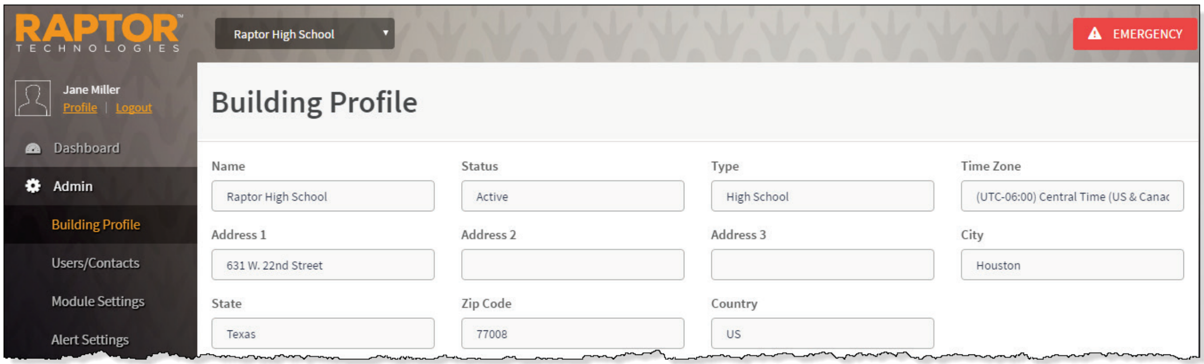
View Client Profile

The **Client Profile** workspace is used by District Admins to view the client information on file in the Raptor system, such as name, address, and status. You access this workspace by selecting **Admin > Client Profile** in the navigation menu.



View Building Profile

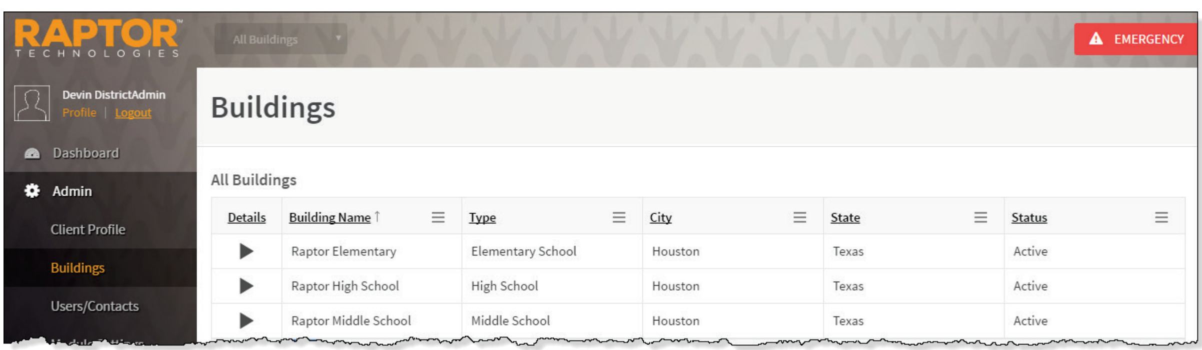
The **Building Profile** workspace is used by Building Admins to view the information on file in the Raptor system for specific buildings, such as name, address, and status. You access this workspace by selecting **Admin > Building Profile** in the navigation menu.



View Buildings

The **Buildings** workspace is visible only to District Admins and enables them to view details (name, type, city, state, status and building ID) for the buildings in their district. The Building ID column is hidden by default.

You access this workspace by selecting **Admin > Buildings** in the navigation menu. Additional information is available by clicking the ▶ icon in the **Details** column for a building.

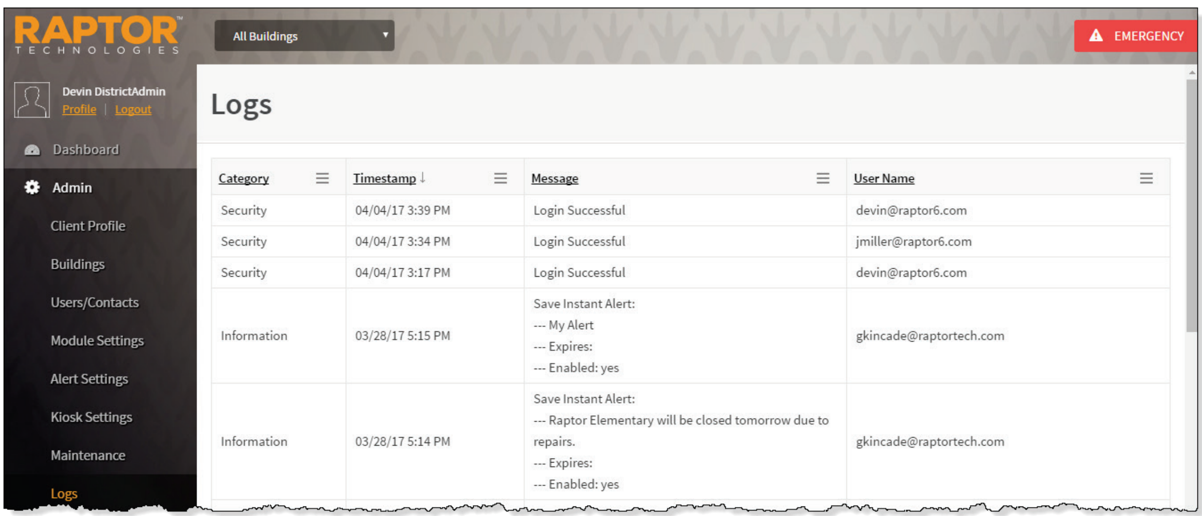


View Logs

The **Logs** workspace is used by District Admins and Building Admins to view the logged information of activity in the Raptor system. You can sort and filter the information, and add or hide the columns.

To access the **Logs** workspace, select **Admin > Logs** in the navigation menu. The following information displays:

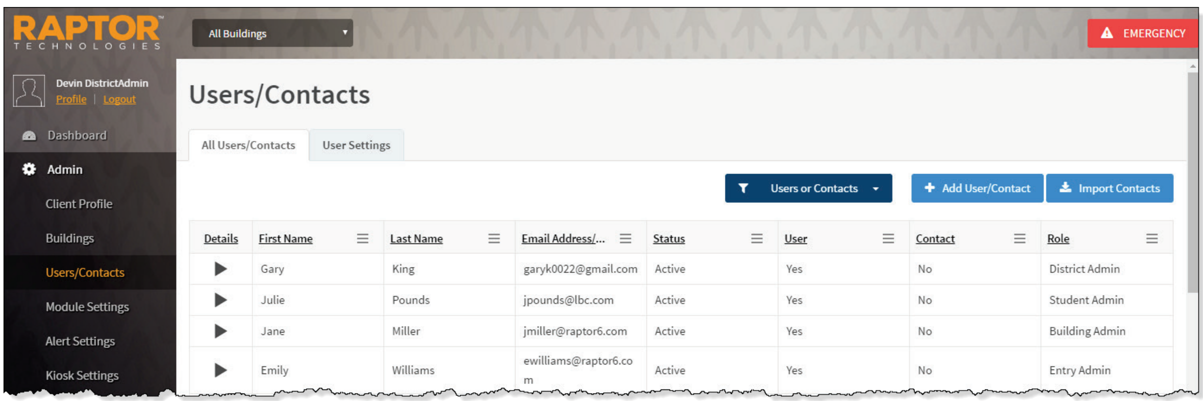
- Category – Information, Security, Error or Audit
- Timestamp – Date and Time the activity occurred
- Message – Description of the activity, such as Login Successful
- User Name – Account that performed the activity



Managing Users/Contacts (Admin)

You can manage the users and contacts in Raptor from the **Users/Contacts** menu item under **Admin**. From the **Users/Contacts** workspace, you can:

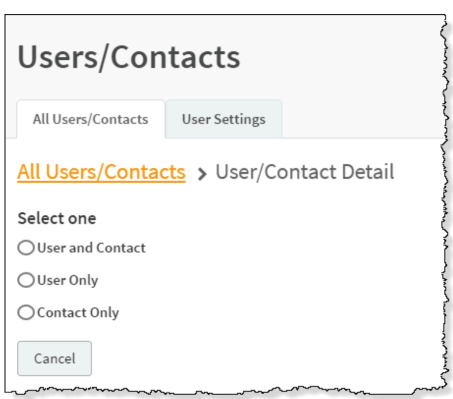
- Add Users and Contacts
- View and Modify Users and Contacts
- View User Account Creation Details
- Modify User Role and Permissions
- Activate and Deactivate Users
- Reset Password
- Specify Maximum Failed Logins



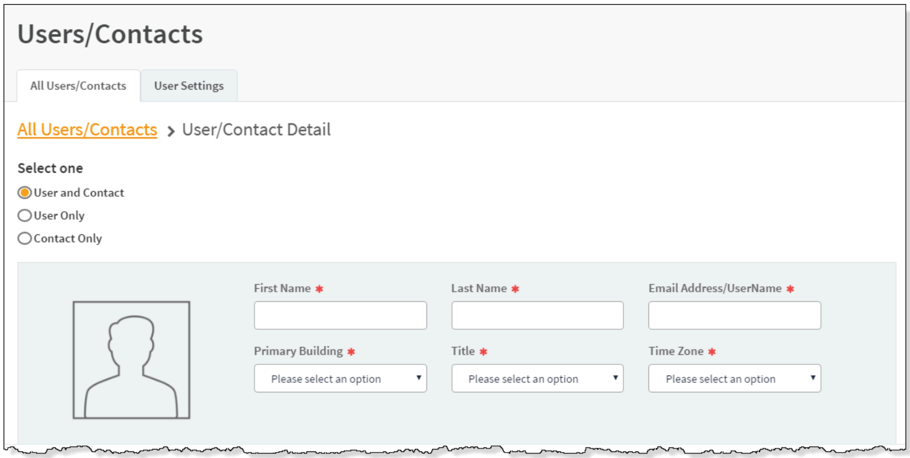
Add User and Contact

Users with the *Can Manage Users* permission can add users and contacts to the Raptor system.

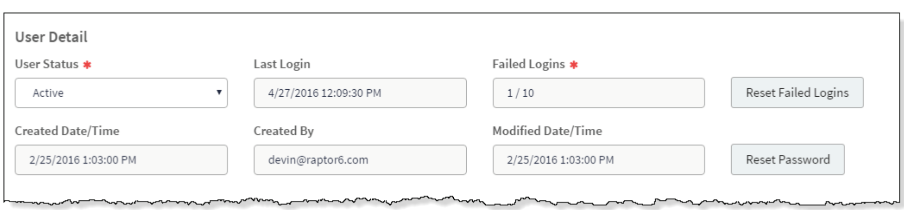
1. In the navigation menu, select **Admin > Users/Contacts**.
2. On the **All Users/Contacts** tab, click **Add User/Contact**.



3. Select the **User and Contact** option.



4. On the **User/Contact Detail** workspace, specify the following user information in the fields (all fields are required):
   - **First Name*** – Enter the user's first name.
   - **Last Name*** – Enter the user's last name.
   - **Email Address/User Name*** – Enter the user's email address. This becomes their user name when logging in to Raptor.
   - **Primary Building*** – Select the user’s primary building from the drop-down list.
   - **Title*** – Select the user’s title from the drop-down list.
   - **Time Zone*** – Select the time zone where the user is located.
5. In the **User Detail** area, specify the following information:

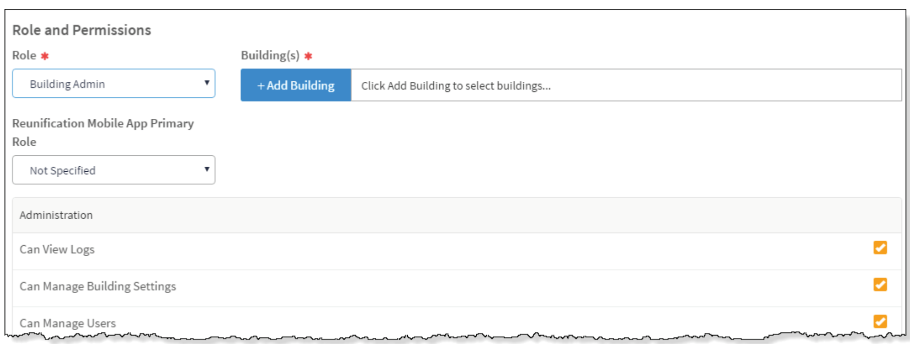


   - **Enter New Password*** – Enter a password; the password must contain 8 or more characters, at least one character in uppercase, and at least one special character.
   - **Confirm New Password*** – Re-enter the password to confirm it.
   - **User Status*** – Select the user's status from the drop-down menu (Active or Deactivated).

6. In the **Contact Detail** area, specify the following information:

- **Preferred Contact Method*** -- Select how the user wants to be contacted from the drop-down list.
- **Text Messaging Phone** – Enter the phone number to send text message notifications.
- **Voice Phone** – Enter the phone number to send a voice notification.

7. Under **Role and Permissions**, select the **Role** to assign to the user account.



8. In the **Building(s)** field, click **Add Building** and select the building from the drop-down list to specify the building to which the user has permission to view in Raptor. You can add multiple buildings if the role allows for this.

> **Note** If the Role is set to *District Admin* or *District Volunteer Coordinator*, this field does not display since they can access all buildings.

REU 9. Select the **Reunification Mobile App Primary Role** from the drop-down list.

10. Depending on the role that is selected, the allowable permissions display in the lower portion of the **Role and Permissions** section. Select the check box next to each permission you want the user to be granted.

> **Note** If the check box has an icon next to it, the user creating the new account does not have permission to grant that specific permission.

11. Click **Save**.

    You are returned to the **All Users/Contacts** workspace and a message displays indicating the new user was successfully saved.

Add User Only

Perform the following steps to add only a user to the Raptor system.

1. In the navigation menu, select **Admin > Users/Contacts**.
2. On the **All Users/Contacts** tab, click **Add User/Contact**.
3. Select the **User Only** option.
4. On the **User/Contact Detail** workspace, specify the following user information in the fields (all fields are required):
   - **First Name*** – Enter the user's first name.
   - **Last Name*** – Enter the user's last name.
   - **Email Address/User Name*** – Enter the user's email address. This becomes their user name when logging in to Raptor.
   - **Primary Building*** – Select the user's primary building from the drop-down list.
   - **Title*** – Select the user's title from the drop-down list.
   - **Time Zone*** – Select the time zone where the user is located.
5. In the **User Password and Detail** area, specify the following information:
   - **Enter New Password*** – Enter a password; the password must contain 8 or more characters, at least one character in uppercase, and at least one special character.
   - **Confirm New Password*** – Re-enter the password to confirm it.
   - **User Status*** – Select the user's status from the drop-down menu (Active or Deactivated).
6. Under **Role and Permissions**, select the **Role** to assign to the user account.
7. In the **Building(s)** field, click **Add Building** and select the building from the drop-down list to specify the building to which the user has permission to view in Raptor. You can add multiple buildings if the role allows for this.

   > **Note** If the Role is set to *District Admin* or *District Volunteer Coordinator*, this field does not display since they can access all buildings.

REU 8. Select the **Reunification Mobile App Primary Role** from the drop-down list.

9. Depending on the role that is selected, the allowable permissions display in the lower portion of the **Role and Permissions** section. Select the check box next to each permission you want the user to be granted.

> **Note** If the check box has an 🔒 icon next to it, the user creating the new account does not have permission to grant that specific permission.

10. Click **Save**.

    You are returned to the **All Users/Contacts** workspace and a message displays indicating the new user was successfully saved.

Add Contact Only

Perform the following steps to add only a contact to the Raptor system:

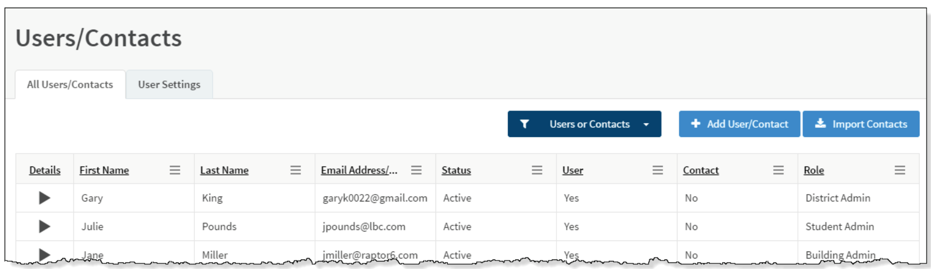
1. In the navigation menu, select **Admin > Users/Contacts**.
2. On the **All Users/Contacts** tab, click **Add User/Contact**.
3. Select the **Contact Only** option.
4. On the **User/Contact Detail** workspace, enter the following user information in the fields (all fields are required):
   - **First Name** – Enter the user's first name.
   - **Last Name** – Enter the user's last name.
   - **Email Address/User Name*** – Enter the user's email address. This becomes their user name when logging in to Raptor.
   - **Primary Building*** -- Select the user’s primary building from the drop-down list.
   - **Title*** – Select the user’s title from the drop-down list.
5. In the **Contact Detail** area, specify the following information:
   - **Preferred Contact Method*** -- Select how the user wants to be contacted from the drop-down list.
   - **Text Messaging Phone** – Enter the phone number to send text message notifications.
   - **Voice Phone** – Enter the phone number to send a voice notification.
6. Click **Save**.

   You are returned to the **All Users/Contacts** workspace and a message displays indicating the new user was successfully saved.

View and Modify Users/Contacts

Users with the *Can Manage Users* permission can view all users that have been added to the Raptor system on the All Users/Contacts workspace.

1. In the navigation menu, select **Admin > Users/Contacts**.
2. From the Building Selector, select the building or select **All Buildings**.
3. On the **All Users/Contacts** tab, click **Users or Contacts** and then select one of the following options:
   - **Users or Contacts** – to display all users and contacts.
   - **Users** – to display only user accounts.
   - **Contacts** – to display only contacts.



4. Scroll to the user account or contact that you would like to view or modify and click the ▶ icon to expand the **User/Contact Detail**.
5. Modify any of the current account information, or change the account type as follows:
   - Change a *user and contact* account to only a *user account* or only a *contact* (see Modify User and Contact Account).
   - Change a *user account* to only a *contact* or to a *user and contact* (see Modify User Only Account).
   - Change a *contact* to only a *user account* or a *user account and contact* (see Modify Contact Only).
6. When you have completed your changes, click **Save**.

Modify User and Contact Account

If the account is currently defined as a **User and Contact**, you can change it to a **User Only** or **Contact Only** account.

1. On the **User/Contact Detail** workspace, click one of the following options:
   - **User Only** – to collapse the contact information for the user account; the user no longer receives notifications.
   - **Contact Only** – to collapse the user details, and role and permissions for the account; the user can no longer log in as a user and they will only receive notifications.
2. Click **Save**.

> **Note** If you change a User and Contact to a User Only or Contact Only, the user and/or contact information is not deleted; it is only disabled. Subsequently, if you re-enable the user or contact, that information will be reinstated except for the password, which must be re-entered and confirmed.

Modify User Only Account

If the account is currently defined as a **User Only**, you can change it to a **User and Contact** or **Contact Only** account.

1. On the **User/Contact Detail** workspace, click one of the following options:
   - **User and Contact** – to expand the **Contact Details** and **Contact Notifications** areas on the workspace.
   - **Contact Only** – to collapse the user information for the account; the user can no longer log in as a user and they will only receive notifications.
2. If you selected **User and Contact**, complete the contact details and contact notifications for the user account.
3. Click **Save**.

Modify Contact Only

If the account is currently defined as a **Contact Only**, you can change it to a **User and Contact** or **User Only** account.

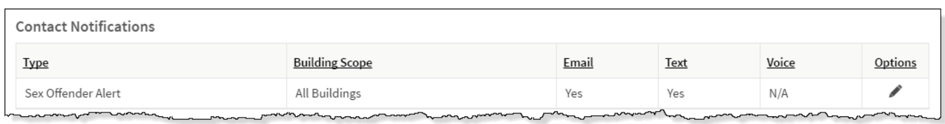
1. On the **User/Contact Detail** workspace, click one of the following options:
   - **User and Contact** – to expand the **User Detail** area on the workspace.
   - **User Only** – to collapse the **Contact Detail** and **Contact Notifications** areas on the workspace, and expand the **User Detail** area.
2. Complete the user details for the user account.

3. Click **Save**.

View and Modify Notifications

Users with the *Can Manage Client Settings* or *Can Manage Building Settings* permission can view all notifications that are associated with a contact.

1. In the navigation menu, select **Admin** > **Users/Contacts**.
2. On the **All Users/Contacts** tab, click **Users and Contacts** and then select one of the following options:
   - **Users and Contacts** – to display all users and contacts.
   - **Contacts** – to display only contacts.
3. Scroll to the contact and click ▶ to open the contact detail.
4. In the **Contact Notifications** area, view the notifications which are associated with the contact. The notification type, building scope, and contact method (Email, Text, Voice) is indicated.


Contact Notifications

Type	Building Scope	Email	Text	Voice	Options
Sex Offender Alert	All Buildings	Yes	Yes	N/A	

5. If you would like to modify a method for notification (Email, Text or Voice), click the icon and select the appropriate check boxes.

> **Note** You can only select a check box for a notification method specified in the Contact Detail. For example, if Voice was not selected as a method of notification, the check box will be disabled.

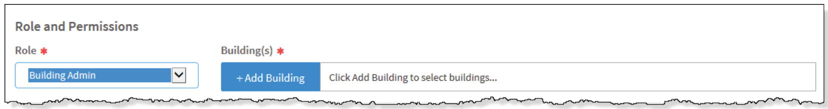
6. Click the ✔ icon to save your changes.

Modify User Role and Permissions

When users are added to Raptor, their role and permissions are set during the account creation. Administrators can modify user roles and permissions using the following procedure.

1. In the navigation menu, select **Admin > Users/Contacts**.
2. On the **All Users/Contacts** tab, click **Users and Contacts** and then select one of the following options:
   - **Users and Contacts** – to display all users and contacts.
   - **Users** – to display only user accounts.
3. Navigate to the user account and click the ▶ icon to view the **User/Contact Detail**.

4. Under **Role and Permissions**, select the **Role** to assign to the user account. See Understanding User Accounts.



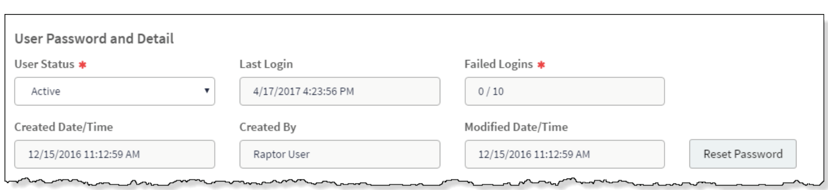
5. In the **Buildings** field, click **Add Building** and select the building from the drop-down list to specify the building to which the user has permission to view in Raptor. You can add multiple buildings if the role allows for this.
6. Select the check box next to each task to which the user is granted permissions.
7. Click **Save**.

> **Note** If the user is logged in when their roles or permissions have been modified, they must log out of Raptor and then log in before the new roles and/or permissions take effect.

View User Details

You can view details about the user account, such as when it was created or modified, the number of failed login attempts, and the last time the user logged into Raptor.

1. In the navigation menu, select **Admin > Users/Contacts**.
2. From the Building Selector, select the building or select **All Buildings** to display all users.
3. On the **All Users/Contacts** tab, click **Users and Contacts** and then select one of the following options:
   - **Users or Contacts** – to display all users and contacts.
   - **Users** – to display only user accounts
4. Scroll to the user account you would like to view and click the ▶ icon to expand the **User/Contact Detail**.



5. In the **User Password and Detail** area, view the following information:
   - **User Status*** – Status of the user account. You can change the status of the user account. See Activate and Deactivate Users.
   - **Last Login** – Date and time the user last logged into Raptor.
   - **Failed Logins*** – Number of times the user has attempted to log in with invalid credentials.
   - **Reset Failed Logins** – This button displays when 1 or more failed log in attempts has been recorded. You can reset failed logins.

     Click **Reset Failed Logins** to reset the count to 0.
   - **Created Date/Time** – Date and time the user account was created.
   - **Created By** – The user who created the user account.
   - **Modified Date/Time** – Date and time the user account was last modified.
   - **Reset Password** – You can reset the password for the user account from this area. See Reset Password.

Activate and Deactivate Users

You can activate or deactivate a user account from the **User/Contact Detail** workspace.

> **Note** If a user account has been deactivated, the user will see a message "Your account has been locked, contact your administrator" when they attempt to log in.

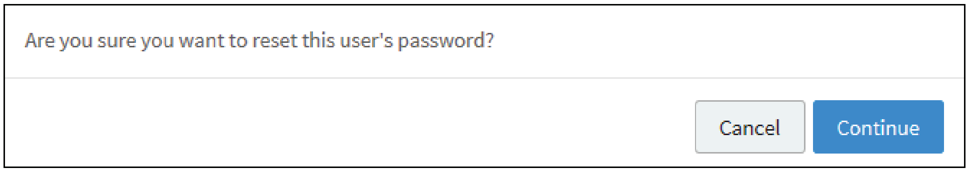
1. In the navigation menu, select **Admin > Users/Contacts**.
2. From the Building Selector, select the building or **All Buildings**.
3. On the **All Users/Contacts** tab, scroll to the user account you would like to view or modify and click the ▶ icon to expand the record.
4. In the **User Status** field, select **Active** or **Deactivated** from the drop-down menu.
5. Click **Save**.

Reset Password

Administrators can reset a user's password from the **User/Contact Detail** workspace.

1. In the navigation menu, select **Admin > Users/Contacts**.
2. From the Building Selector, select the building or **All Buildings**.
3. On the **All Users/Contacts** tab, scroll to the user account that you want to change the password and click the ▶ icon to expand the details.

4. In the **User Password and Detail** area, click **Reset Password**.
5. On the confirmation dialog, click **Continue** to reset the password.



The system auto-generates a new password for the user. A drop-down message displays the changed password.

6. Click **OK**.

Import Contacts

Administrators with the *Can Manage Users* permission can select, map, and import a file containing one or more contact records into the system.

> **Note** To use this feature, you must first create an Excel spreadsheet or comma delimited file that contains the required information.

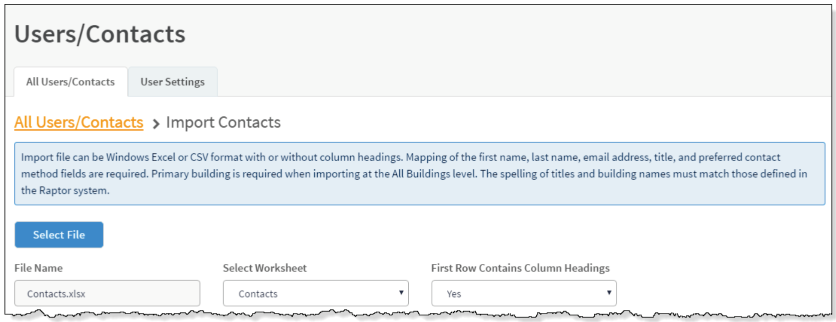
The file can contain the following contact information to be imported:

- First Name*
- Last Name*
- Email Address*
- Title*
- Notification Method*
- Text Phone – required only if defined as a notification method
- Voice Phone – required only if defined as a notification method
- Primary Building – required only if you are importing contacts for All Buildings

> **Note** Primary Building is not a field mapping option at the building level. The building in the building selector will be used.

Perform the following steps to import contacts.

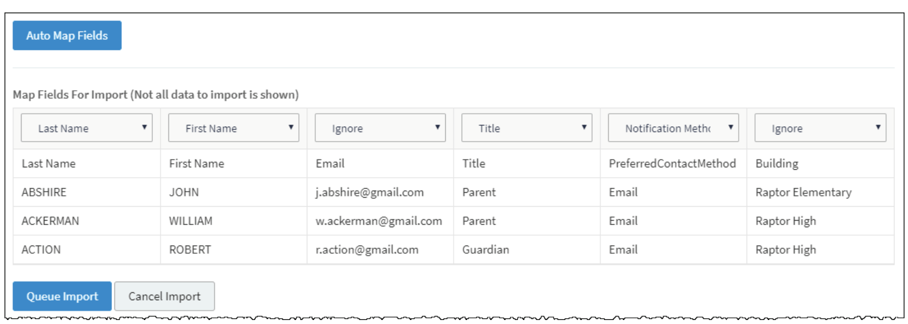
1. In the navigation menu, select **Admin > Users/Contacts**.
2. Click **Import Contacts**.



3. Click **Select File** and navigate to the location where the file is saved on your computer.
4. Select the **Excel** or **CSV** file and click **Open**.
5. If you used Excel and the file contains multiple worksheets, select the worksheet that contains the custom alert information from the **Select Worksheet** drop-down list.
6. If the first row of the worksheet contains column headings, select **Yes** from the **First Row Contains Column Headings** drop-down list. Otherwise, select **No**.
7. Click **Auto Map Fields** to automatically map the column headings in the file to the mapping names in Raptor. The names must be identical.

   You can also manually map each of the columns to be imported by selecting the appropriate fields in the drop-down menu above each column that displays.

   > **Note** First Name, Last Name, Email Address, Title and Notification Method are required columns. The columns with **Ignore** selected with not be imported.



8. Click **Queue Import**.

   A message displays in the lower right corner of the screen stating that the import job was successfully added to the import queue for processing.

When the import has completed processing, an email will be sent to the email address of the user indicating the number of records successfully imported and any error that may have occurred.

Manage Maximum Failed Logins

In Raptor, there are two thresholds for locking user accounts after failed login attempts—a threshold set by the system and a threshold specified by the user.

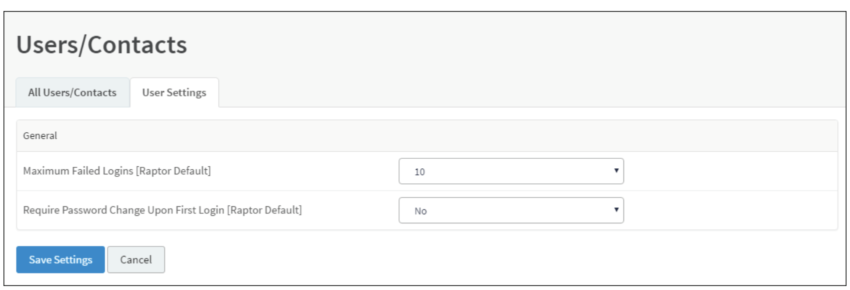
The system threshold allows the user five consecutive failed login attempts before they are locked out of their account for 15 minutes. After three failed login attempts, a message will display warning the user that after five failed attempts, they will be locked out of their account. If they reach the threshold of five failed login attempts, the message *Your account has been locked for 15 minutes* displays and they must wait 15 minutes before attempting to login again.

The second threshold is set on the **User Settings** tab and after the specified number of failed logins has been reached, they are locked out of their account and must contact an Administrator.

When either of the thresholds is reached, an appropriate message is written to the Logs. If a user successfully logs in before reaching either threshold, the number of failed logins is reset to 0/10.

Set Maximum Failed Logins

1. From the navigation menu, select **Admin > Users/Contacts**.
2. Click the **User Settings** tab.



3. From the **Maximum Failed Logins** drop-down list, select the number of failed login attempts that are allowed before the user account is locked and must be reset by an Administrator. By default, the number of attempts is set to 10.

> **Note** If this setting is 5 or less, only the user specified threshold will be active and the user will be locked out of their account and must contact an Administrator. Also, the system will not report the number of failed login attempts in the Logs.

4. Click **Save Settings**.

Manage Password Change Requirements

Users with the *Can Manage Users* permission can specify whether to require a new user to change their password after their first login to Raptor.

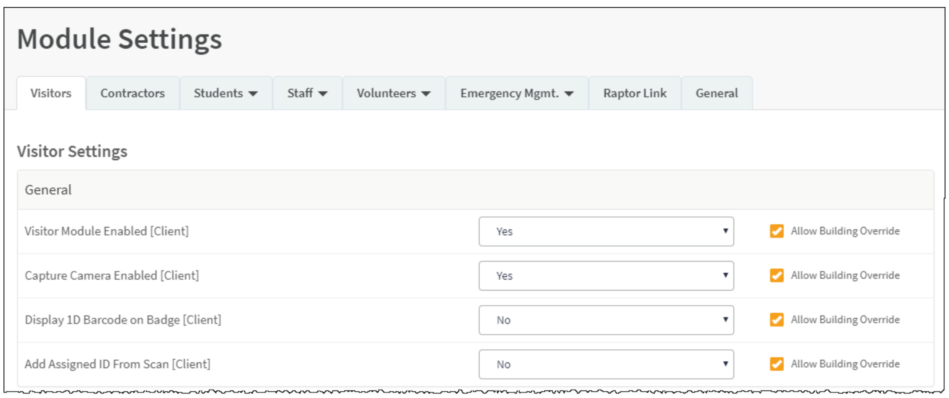
1. From the navigation menu, select **Admin > Users/Contacts**.
2. Click the **User Settings** tab.
3. In the **Require Password Change Upon First Login** field, select **Yes** (to enable) or **No** (to disable). The default setting is **No**.
4. Click **Save Settings**.

Managing Visitor Module Settings (Admin)

Users with Administrative permissions can manage what displays in the Visitors module using the **Visitors** tab on the **Module Settings** workspace. You access this workspace by selecting **Admin > Module Settings** in the navigation menu.

On the **Visitor Module Settings** workspace, the **Allow Building Override** check box is only available when specifying settings for All Buildings (client level).

It is assumed that all procedures in this section are performed at the client level (All Buildings is selected in the Building Selector). If you want to specify settings for a specific building, select that building from the Building Selector before performing the procedure.



Enable/Disable Visitor Module

By default, Raptor is configured with the Visitors Module enabled. The module can be disabled to hide Visitor features in the navigation menu, **Sign In/Sign Out** workspace and **Reports** workspace. The Visitor dashboards will also be hidden once the user logs out and logs back in after disabling the module.

Perform the following steps to enable or disable the Visitor Module:

1. In the navigation menu, select **Admin > Module Settings**.
2. On the **Visitors** tab, in the **Visitor Module Enabled** drop-down list, select **Yes** (to enable) or **No** (to disable).
3. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
4. Click **Save Settings**.
5. Log out of Raptor and then log in to see the change.

Enable/Disable Capture Camera

The capture camera feature allows the user to take a photo of the person signing in and associate that photo with the person's record in the Raptor system. This feature is useful when the person signing in does not have an official ID that can be scanned, such as a passport.

By default, Raptor is configured with the Capture Camera disabled. Users can enable this feature using the **Capture Camera Enabled** setting on the Visitor Module Settings workspace. When the capture camera is enabled, the **Camera** button displays on the **Sign In** workspace below the photo.

> **Notes**
> - A camera is required to use this feature.
> - If you are using a Windows Internet Explorer (IE) browser, you must have Adobe Flash Player installed to use the Capture Camera feature.

Perform the following steps to enable or disable the capture camera feature:

1. In the navigation menu, select **Admin > Module Settings**.
2. On the **Visitors** tab, in the **Capture Camera Enabled** drop-down list, select **Yes** (to enable) or **No** (to disable).
3. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
4. Click **Save Settings**.
5. Log out of Raptor and then log in to see the change.

Display 1D Barcode on Badge

Users with Administrative permissions can control whether a 1D barcode is printed on the visitor badge. If the 1D barcode is printed on the badge, the visitor can simply scan the code on their badge when signing out at the front desk or kiosk.

Perform the following steps to display the 1D barcode on the visitor badge:

1. In the navigation menu, select **Admin > Module Settings**.
2. On the **Visitors** tab, in the **Display 1D Barcode on Badge** drop-down list, select **Yes** (to enable) or **No** (to disable).
3. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
4. Click **Save Settings**.
5. Log out of Raptor and then log in to see the change.

Add Assigned ID From Scan

Users with the *Can Manage Visitors Settings* permission can specify whether to allow a 1D barcode to be captured from a visitor's ID card and populated in the **Assigned ID** field for that visitor.

Perform the following steps to enable or disable this feature:

1. In the navigation menu, select **Admin > Module Settings**.
2. On the **Visitors** tab, in the **Add Assigned ID From Scan** drop-down list, select **Yes** (to enable) or **No** (to disable).
3. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
4. Click **Save Settings**.
5. Log out of Raptor and then log in to see the change.

Specify Sign-In Settings

Users with the *Can Manage Visitor Settings* permission use the **Visitor Module Settings** workspace to manage visitor sign-in settings.

1. In the navigation menu, select **Admin > Module Settings**.
2. On the **Visitors** tab, in the **Sign In** area, specify the following settings:
   - **Allow Official Record Creation From Manual Entry** -- Select **Yes** (to allow) or **No** (to not allow) to indicate whether the **Official Record** check box displays on the **Visitor Sign In** workspace when using manual entry.
   - **Allow Quick Find Across All Buildings** – Select **Yes** (to allow) or **No** (to not allow) to indicate whether the Quick Find feature will return the visitor if they have been scanned into any building district-wide. This feature can only be used for visitors who have an official record for at least one of the client's buildings. The default value for this setting is **No**.
3. Select the **Allow Building Override** check box if these settings can be overridden at the building level. Otherwise, clear the check boxes.
4. Click **Save Settings**.
5. Log out of Raptor and then log in to see the change.

Specify Auto Sign-Out Time

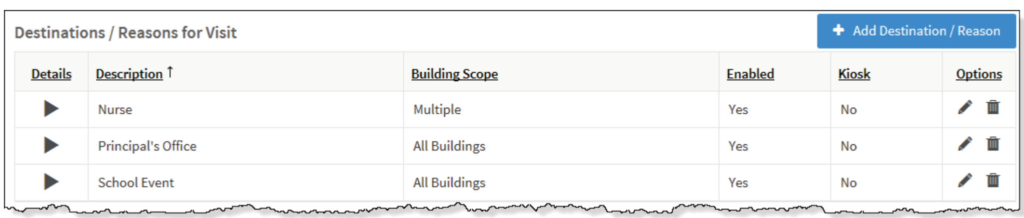
By default, Raptor is configured to automatically sign out all visitors at 5:00 PM. Users with Administrator permissions can change this time and also specify whether the setting can be overridden at the building level.

Perform the following steps to modify the auto-sign out time:

1. In the navigation menu, select **Admin > Module Settings**.
2. On the **Visitors** tab, in the **Auto Sign Out Time** field, click the icon and select the time from the drop-down list.
3. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
4. Click **Save Settings** when you have completed any changes.
5. Log out of Raptor and then log in to see the change.

Manage Destinations/Reasons for Visit

This area of the **Visitor Module Settings** workspace enables you to manage the destination/reasons that display in the **Sign In** workspace.



Destinations / Reasons for Visit

Add Destination / Reason

Details	Description	Building Scope	Enabled	Kiosk	Options
	Nurse	Multiple	Yes	No	
	Principal's Office	All Buildings	Yes	No	
	School Event	All Buildings	Yes	No	

Add Destination/Reason

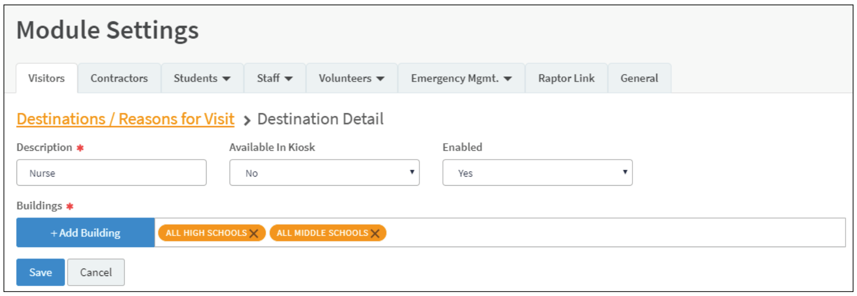
Perform the following steps to add a new destinations/reasons for visit item to display in the field drop-down list on the **Visitor Sign In** workspace:

1. In the navigation menu, select **Admin > Module Settings**.
2. On the **Visitors** tab, in the **Destinations/Reasons for Visit** area, click **Add Destination/Reason**.
3. Enter a name for the destination or reason in the **Description** text field.
4. If you want to disable the destination/reason for visit (it will not display on the **Visitor Sign In** workspace) clear the **Enabled** check box.
5. If you want to disable the destination/reason for visit in the Kiosk, clear the **Kiosk** check box.
6. Click the icon to save the new destination/reason for visit. If you want to discard your changes, click the icon.

Modify Destinations/Reasons for Visit

You can edit destinations/reasons for visit items to the field drop-down list, enable or disable the item, or change the setting for whether it displays in the Kiosk.

1. In the navigation menu, select **Admin > Module Settings**.
2. In the **Destinations/Reasons for Visit** area, click the ▶ icon to expand the Destination Detail.



3. Modify the following information:
   - **Description** – Change the **Description** for the destination/reason for visit.
   - **Available in Kiosk** – Select **Yes** (to enable) or **No** (to disable) to specify whether the item is available in the Kiosk.
   - **Enabled** – Select **Yes** (to enable) or **No** (to disable) to specify whether the item is currently enabled or disabled.
   - **Buildings** –To add a building or building group, click **Add Building** and select the building or building group from the drop-down list. To delete a building, click the **X** on the building label.
4. Click **Save**.

You can also click the ✎ icon in the **Options** column in the **Destinations/Reasons for Visit** area on the **Visitor Module Settings** workspace to edit the **Description** name and enable/disable the **Kiosk** setting and the **Enabled** setting. Click the ✔ icon to save your changes. If you want to discard your changes, click the ✖ icon.

Delete Destinations/Reasons for Visit

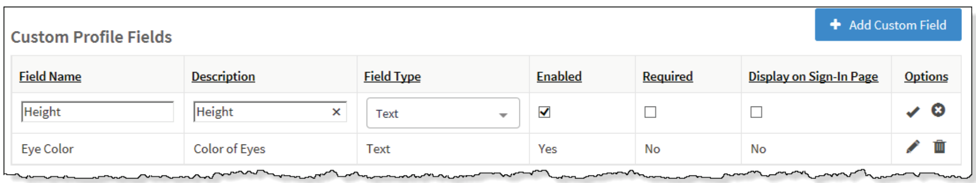
To remove a Destinations/Reasons for Visit item, click the 🗑 icon in the **Destinations/Reasons for Visit** area on the **Visitor Module Settings** workspace and then click **OK** on the confirmation dialog.

Manage Custom Profile Fields

A custom profile field is associated with the visitor and this information is displayed on the visitor's Details page. If necessary, it may also be configured to display on the **Sign In/Sign Out** workspace.

Add Custom Profile Field

1. In the navigation menu, select **Admin > Module Settings**.
2. On the Visitors tab, in the **Custom Profile Fields** area, click **Add Custom Field**.



3. Enter the **Field Name** and **Description** in the text boxes.
4. From the **Field Type** drop-down list, select the type of field (Lookup, Text, Text Area).
5. Select or clear the **Enabled** check box.
6. If this is a required field that must be completed during visitor sign in, select the **Required** check box.
7. Select the **Display on Sign-In Page** check box if you want the field to display on the **Sign In** workspace.

> **Note** Custom Profile fields are displayed on the **Sign In** workspace only if the **Display on Sign-In Page** check box is selected. This field displays as read-only unless using the manual entry feature.

8. Click the ✔ icon to save the newly created custom field. If you want to discard your changes, click the ⊗ icon.
9. If the **Lookup** field type is selected, click **Manage Values** to specify the Lookup Values for the field.
10. Click **Add Lookup Value**, enter the **Value** in the text field and click ✔ to save it.

Modify or Delete Custom Profile Field

To modify a custom profile field, click the icon in the **Options** column in the **Custom Profile Fields** area on the **Visitor Module Settings** workspace and edit the information. Click the icon to save your changes. If you want to discard your changes, click the icon.

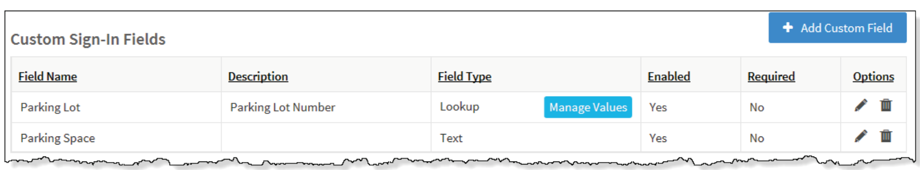
To delete a custom profile field, click the icon in the **Custom Profile Fields** area on the **Visitor Module Settings** workspace and then click **OK** on the confirmation dialog.

Manage Custom Sign-In Fields

You can create custom sign-in fields that are associated with sign-in events to display on the **Visitor Sign In** and **Visitor Delayed Entry** workspaces for all buildings or specific buildings.

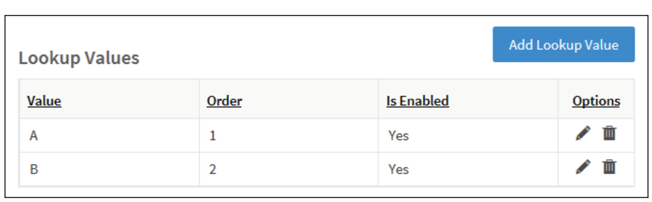
Add Custom Sign-In Field

1. In the navigation menu, select **Admin > Module Settings**.
2. On the Visitors tab, in the **Custom Sign In Fields** area, click **Add Custom Field**.



Field Name	Description	Field Type		Enabled	Required	Options
Parking Lot	Parking Lot Number	Lookup	Manage Values	Yes	No	
Parking Space		Text		Yes	No	

3. Enter the **Field Name** and **Description** in the text fields.
4. From the **Field Type** drop-down list, select the type of field (Lookup, Text, Text Area).
5. Select or clear the **Enabled** check box.
6. If this is a required field that must be completed during visitor sign in, select the **Required** check box.
7. Click the icon to save the newly created custom field.
8. If the Lookup field type is selected, click **Manage Values** to specify the Lookup Values for the field.



Value	Order	Is Enabled	Options
A	1	Yes	
B	2	Yes	

9. Click **Add Lookup Value**, enter the Value in the text field and click ✔ to save it.

Modify or Delete Custom Sign-In Field

To modify a custom sign-in field, click the ✎ icon in the **Options** column in the **Custom Sign-In Fields** area on the **Visitor Module Settings** workspace and edit the information. Click the ✔ icon to save your changes. If you want to discard your changes, click the ✖ icon.

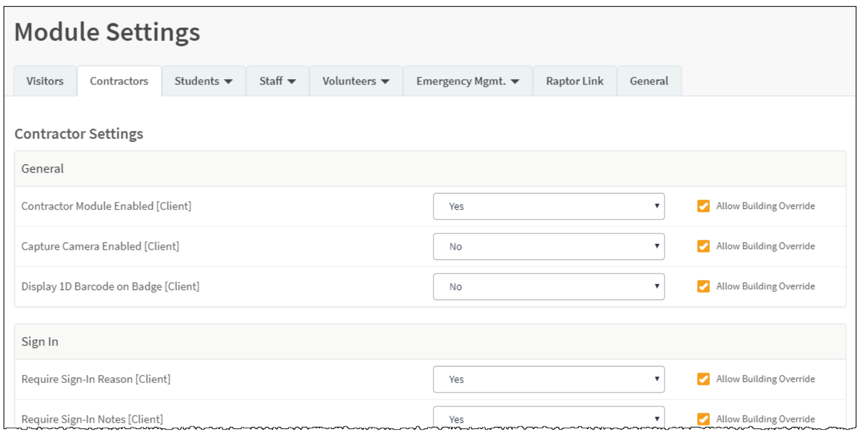
To delete a custom sign-in field, click the 🗑 icon in the **Custom Sign-In Fields** area on the **Visitor Module Settings** workspace and then click **OK** on the confirmation dialog.

Managing Contractor Module Settings (Admin)

Use the **Contractors** tab on the **Module Settings** workspace to manage the fields that display in the Contractors module.

On the **Contractor Module Settings** workspace, the **Allow Building Override** check box is only available when specifying settings for All Buildings (client level).

It is assumed that all procedures in this section are performed at the client level (All Buildings is selected in the Building Selector). If you want to specify settings for a specific building, select that building from the Building Selector before performing the procedure.



Enable/Disable Contractor Module

By default, Raptor is configured with the Contractors Module enabled. The module can be disabled to hide Contractor features in the navigation menu, **Sign In/Sign Out** workspace and **Reports** workspace. The Contractor dashboards will also be hidden once the user logs out and logs back in after disabling the module.

Perform the following steps to enable or disable the Contractors Module:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Contractors** tab.
3. From the **Contractor Module Enabled** drop-down list, select **Yes** (to enable) or **No** (to disable).
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.

5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Enable/Disable Capture Camera

The capture camera feature allows the user to take a photo of the person signing in and associate that photo with the person's record in the Raptor system. This feature is useful when the person signing in does not have an official ID that can be scanned, such as a passport.

By default, Raptor is configured with the Capture Camera disabled. Users can enable this feature using the **Capture Camera Enabled** setting on the Contractor Module Settings workspace. When the capture camera is enabled, the **Camera** button displays on the **Sign In** workspace below the photo.

> **Notes**
>
> - A camera is required to use this feature.
> - If you are using a Windows Internet Explorer (IE) browser, you must have Adobe Flash Player installed to use the Capture Camera feature.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Contractors** tab.
3. From the **Capture Camera Enabled** drop-down list, select **Yes** (to enable) or **No** (to disable).
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Display 1D Barcode on Badge

Users with Administrative permissions can control whether a 1D barcode is printed on the contractor badge. If the 1D barcode is printed on the badge, the contractor can simply scan the barcode on their badge when signing out at the front desk or kiosk.

Perform the following steps to display the 1D barcode on the badge:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Contractors** tab.
3. From the **Display 1D Barcode on Badge** drop-down list, select **Yes** (to enable) or **No** (to disable).

4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Specify Sign-In Settings

Use these settings to specify whether a reason and notes are required when a contractor signs in.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Contractors** tab.
3. Specify whether the following fields are required to be completed during sign in and whether individual buildings can override these settings:
   - **Require Sign-In Reason** – Select **Yes** or **No** from the drop-down list to specify whether the reason for sign in is required.
   - **Require Sign-In Notes** – Select **Yes** or **No** from the drop-down list to specify whether notes must be entered during sign in.
   - **Allow Sign In For Approved Contractors Only** – Select **Yes** or **No** from the drop-down list to specify whether contractor sign in and sign out using the Find feature is restricted to contractors that have been approved by the district and have been created or imported into the Raptor System. When this setting is enabled, contractors can only sign in with operator-assisted Quick Find and Delayed Entry.
   - **Allow Building Override** – Select or clear the check box for each of the fields. If selected, the settings can be overridden at the building level. Otherwise, clear the check boxes.
4. Click **Save Settings**.
5. Log out of Raptor and then log in to see the change.

Specify Auto Sign-Out Time

By default, Raptor is configured to automatically sign out all contractors at 5:00 PM. Users with Administrator permissions can change this time and specify whether the setting can be overridden at the building level.

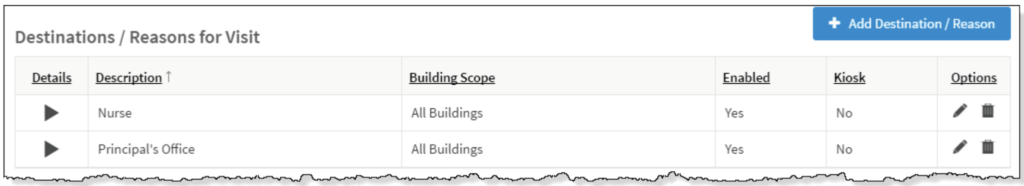
Perform the following steps to modify the auto-sign out time:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Contractors** tab.
3. In the **Auto Sign-Out Time** field, click the icon and select the time from the drop-down list.

4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Manage Destinations/Reasons for Visit

This area of the **Contractor Module Settings** workspace enables you to manage the destination/reasons that display in the **Sign In** workspace.



Details	Description	Building Scope	Enabled	Kiosk	Options
▶	Nurse	All Buildings	Yes	No	
▶	Principal's Office	All Buildings	Yes	No	

Add Destination/Reason

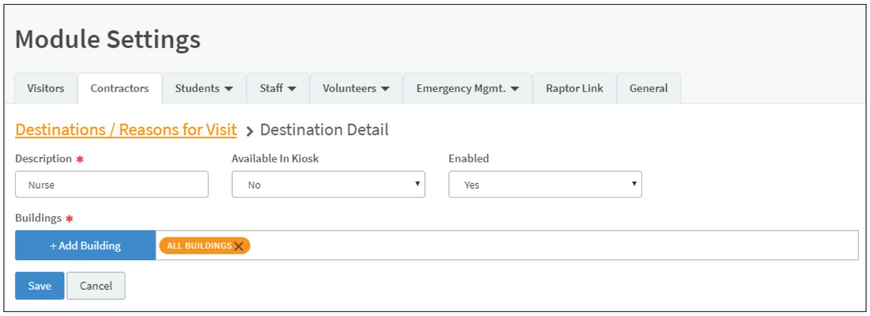
Perform the following steps to add a new destinations/reasons for visit item to display in the field drop-down list on the **Contractor Sign In** workspace:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Contractors** tab.
3. In the **Destinations/Reasons for Visit** area, click **Add Destination/Reason**.
4. Enter a name for the destination or reason in the **Description** text field.
5. If you want to disable the destination/reason for visit (it will not display on the **Visitor Sign In** workspace) clear the **Enabled** check box.
6. If you want to disable the destination/reason for visit in the Kiosk, clear the **Kiosk** check box.
7. Click the ✔ icon to save the new destination/reason for visit. If you want to discard your changes, click the ⊗ icon.

Modify Destinations/Reasons for Visit

You can edit or remove destinations/reasons for visit items to the field drop-down list, enable or disable the item, or change the setting for whether it displays in the Kiosk.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Contractors** tab.
3. In the **Destinations/Reasons for Visit** area, click the ▶ icon to expand the **Destination Detail**.



4. Modify the following information:
   - **Description** – Change the **Description** for the destination/reason for visit.
   - **Available in Kiosk** – Select **Yes** (to enable) or **No** (to disable) to specify whether the item is available in the Kiosk.
   - **Enabled** – Select **Yes** (to enable) or **No** (to disable) to specify whether the item is currently enabled or disabled.
   - **Buildings** –To add a building or building group, click **Add Building** and select the building or building group from the drop-down list. To delete a building, click the **X** on the building label.
5. Click **Save**.

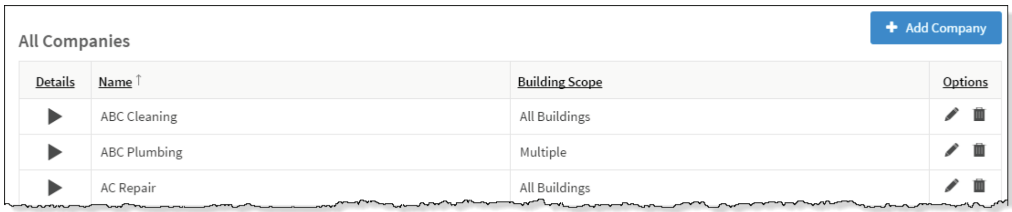
You can also click the ✎ icon in the **Options** column in the **Destinations/Reasons for Visit** area on the **Contractor Module Settings** workspace to edit the **Description** name and enable/disable the **Kiosk** setting and the **Enabled** setting. Click the ✔ icon to save your changes. If you want to discard your changes, click the ✖ icon.

Delete Destinations/Reasons for Visit

To remove a Destinations/Reason for Visit item, click the 🗑 icon in the **Destinations/Reasons for Visit** area on the **Contractor Module Settings** workspace and then click **OK** on the confirmation dialog.

Manage All Companies

The companies who employee the contractors are listed in the **All Companies** area of the workspace.



Add Company

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Contractors** tab.
3. In the **All Companies** area, click **Add Company**.
4. Enter the **Name** of the company in the text field and click the ✔ icon to save it. If you want to discard your changes, click the ⊗ icon.

Modify Building Scope for Companies

If **All Buildings** is selected, you can modify the buildings the contractor is associated with in the company details.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Contractors** tab.
3. In the **All Companies** area, click the ▶ icon to open the **Company Detail** workspace.

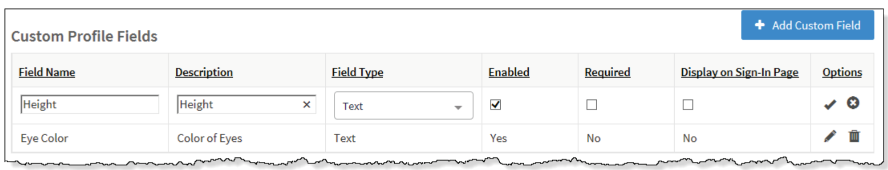
4. In the **Buildings** field, click **Add Building** and select the building or building group from the drop-down list. To delete a building, click the **X** on the building label.
5. Click **Save**.

Manage Custom Profile Fields

A custom profile field is associated with the contractor and this information is displayed on the contractor's Detail page. If necessary, it may also be configured to display on the **Sign In/Sign Out** workspace.

Add Custom Profile Field

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Contractors** tab.
3. In the **Custom Profile Fields** area, click **Add Custom Field**.



4. Enter the **Field Name** and **Description** in the text boxes.
5. From the **Field Type** drop-down list, select the type of field (Lookup, Text, Text Area).
6. Select or clear the **Enabled** check box.
7. If this is a required field that must be completed during contractor sign in, select the **Required** check box.
8. Select the **Display on Sign-In Page** check box if you want the field to display on the **Sign In** workspace.

> **Note** Custom Profile fields are displayed on the **Sign In** workspace only if the **Display on Sign-In Page** check box is selected. This field displays as read-only unless using the manual entry feature.

9. Click the ✔ icon to save the newly created custom field. If you want to discard your changes, click the ⊗ icon.
10. If the **Lookup** field type is selected, click **Manage Values** to specify the Lookup Values for the field.
11. Click **Add Lookup Value**, enter the **Value** in the text field and click ✔ to save it.

Modify or Delete Custom Profile Field

To modify a custom profile field, click the icon in the **Options** column in the **Custom Profile Fields** area on the **Contractor Module Settings** workspace and edit the information. Click the icon to save your changes. If you want to discard your changes, click the icon.

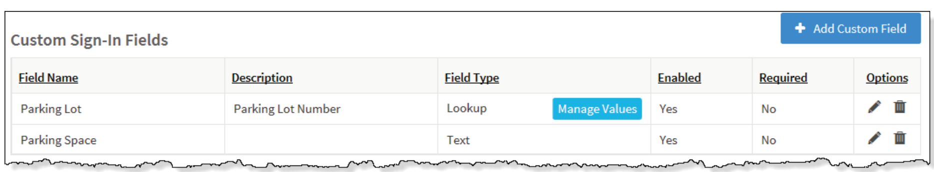
To delete a custom profile field, click the icon in the **Custom Profile Fields** area on the **Contractor Module Settings** workspace and then click **OK** on the confirmation dialog.

Manage Custom Sign-In Fields

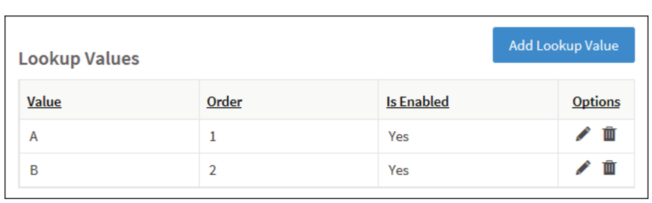
You can create custom sign-in fields that are associated with sign-in events to display on the **Contractor Sign In** and **Contractor Delayed Entry** workspaces for all buildings or specific buildings.

Add Custom Sign-In Field

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Contractors** tab.
3. In the **Custom Sign-In Fields** area, click **Add Custom Field**.



4. Enter the **Field Name** and **Description** in the text fields.
5. From the **Field Type** drop-down list, select the type of field (Lookup, Text, Text Area).
6. Select or clear the **Enabled** check box.
7. If this is a required field that must be completed during contractor sign in, select the **Required** check box.
8. Click the icon to save the newly created custom field.
9. If the Lookup field type is selected, click **Manage Values** to specify the Lookup Values for the field.



10. Click **Add Lookup Value**, enter the Value in the text field and click ✔ to save it.

Modify or Delete Custom Sign-In Field

To modify a custom sign-in field, click the ✎ icon in the **Options** column in the **Custom Sign-In Field** area on the **Contractor Module Settings** workspace and edit the information. Click the ✔ icon to save your changes. If you want to discard your changes, click the ✖ icon.

To delete a custom sign-in field, click the 🗑 icon in the **Custom Sign-In Field** area on the **Contractor Module Settings** workspace and then click **OK** on the confirmation dialog.

Managing Student Module Settings (Admin)

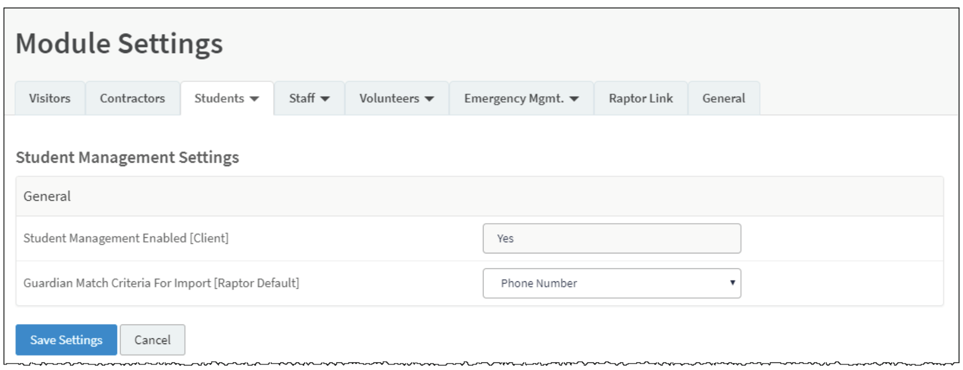
Use the **Students** tab on the **Module Settings** workspace to manage the fields that display in the Student module.

The Students tab includes a drop-down menu where you can select the workspace in which you want to work:

- **Student Management** – Use this workspace to specify student management settings, grades, custom profile fields, custom guardian fields and guardian relationships.
- **Student Sign In/Out** – Use this workspace to specify student sign-in and sign-out settings, sign-in and sign-out reasons, and custom sign-in and sign-out fields.

Specify Student Management Settings

The **Student Management Settings** workspace is used to specify student module settings.



Enable/Disable Student Management

By default, Raptor is configured with the Student Management feature enabled. It can be disabled to hide Student features in the navigation menu, including Student Reports, Student Sign In/Sign Out and Student dashboards.

Perform the following steps to enable or disable the Student Management feature:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Students** tab and select **Student Management** from the drop-down menu.
3. From the **Student Module Enabled** drop-down list, select **Yes** (to enable) or **No** (to disable).

4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Guardian Match Criteria for Import

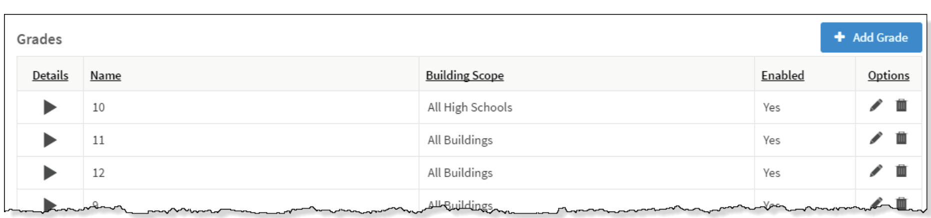
When guardian records are imported, the Raptor system uses a combination of first name, last name, and some other criteria (date of birth, email address or phone number) to determine if the imported record is already in the system. By default, this value is set to Date of Birth. The additional criteria can be specified at the client level.

> **Note** It is very important that you include the third type of matching criteria, such as date of birth, email address or phone number) to prevent duplicate guardian records in the system.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Students** tab and select **Student Management** from the drop-down menu.
3. From the **Guardian Match Criteria for Import** drop-down list, select the criteria to be used in addition to first name and last name (None, Date of Birth, Phone Number, or Email Address).
4. Click **Save Settings**.
5. Log out of Raptor and then log in to see the change.

Manage Grades

You can define grades and then associate them with buildings so that when you are adding a student that is associated with that building, only those grades specific to the building display in the **Grades** drop-down list on the **Student Detail** workspace. This feature helps narrow the list of options in the drop-down list.



> **Note** When Raptor Link is used, Grades defined in the SIS will be automatically populated.

Add Grade

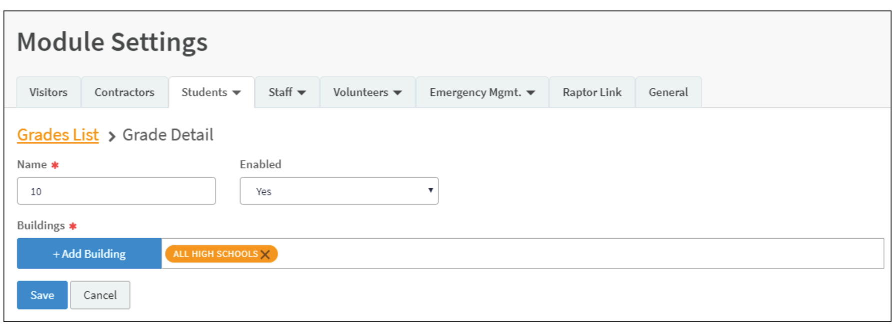
Perform the following procedure to add a grade for All Buildings or a specific building:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Students** tab and select **Student Management** from the drop-down menu.
3. In the **Grades** area on the **Student Module Settings** workspace, click **Add Grade**.
4. In the **Name** text box, enter the grade number or a descriptive name.
5. If you want this field to be enabled on the **Student Sign In** workspace, keep the **Enabled** check box selected. Otherwise, clear the check box.
6. Click the ✔ icon to save the information. If you want to discard your changes, click the ✖ icon.

Specify Building Scope for Grades

You can specify the building or building group for specific grades if you are at the client level (All Buildings).

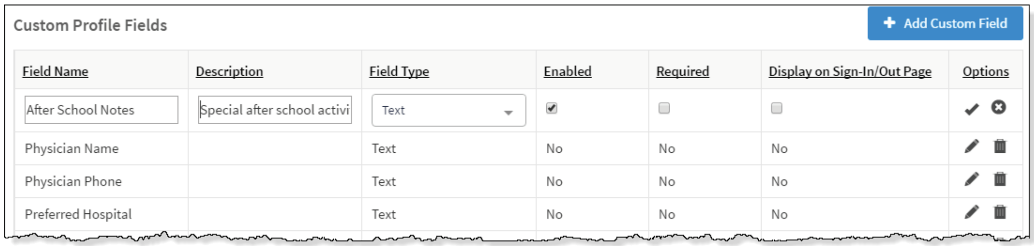
1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Students** tab and select **Student Management** from the drop-down menu.
3. In the **Grades** area, click the ▶ icon to open the **Grade Detail** workspace.



4. In the **Buildings** field, click **Add Building** and select the building or building group from the drop-down list.
5. Click **Save**.

Manage Custom Profile Fields

A custom profile field is associated with the student and this information is displayed on the student's Details page. If necessary, it may also be configured to display on the **Sign In/Sign Out** workspace.



By default, the custom profile fields that ship with the product are disabled.

Add Custom Profile Field

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Students** tab and select **Student Management** from the drop-down menu.
3. In the **Custom Profile Fields** area, click **Add Custom Field**.
4. Enter the **Field Name** and **Description** in the text boxes.
5. From the **Field Type** drop-down list, select the type of field (Lookup, Text, Text Area).
6. Select or clear the **Enabled** check box.
7. If this is a required field that must be completed during student sign in, select the **Required** check box.
8. Select the **Display on Sign-In Page** check box if you want the field to display on the **Sign In** workspace.

   > **Note** Custom Profile fields are displayed on the **Sign In** workspace only if the **Display on Sign-In Page** check box is selected. This field displays as read-only unless using the manual entry feature.

9. Click the ✔ icon to save the newly created custom field. If you want to discard your changes, click the icon.
10. If the Lookup field type is selected, click **Manage Values** to specify the Lookup Values for the field.
11. Click **Add Lookup Value**, enter the **Value** in the text field and click ✔ to save it.

Modify or Delete Custom Profile Field

To modify a custom profile field, click the icon in the **Options** column in the **Custom Profile Field** area on the **Student Management** workspace and edit the information. Click the icon to save your changes. If you want to discard your changes, click the icon.

To delete a custom profile field, click the icon in the **Custom Profile Field** area on the **Student Management** workspace and then click **OK** on the confirmation dialog.

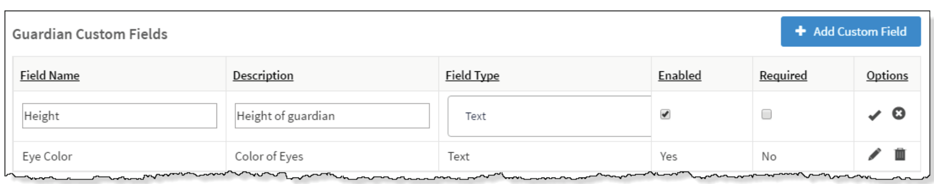
Manage Guardian Custom Fields

You can create custom fields to display on the **Guardian Detail** workspace for all buildings or specific buildings.

Add Custom Guardian Field

Perform the following steps to add a guardian custom field:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Students** tab and select **Student Management** from the drop-down menu.
3. In the **Guardian Custom Fields** area, click **Add Custom Field**.



4. Enter the **Field Name** and **Description** in the text fields.
5. From the **Field Type** drop-down list, select the type of field (Text, Lookup, Text Area).
6. Select or clear the **Enabled** check box.
7. If this is a required field that must be completed during student sign in, select the **Required** check box.
8. Click the icon to save the newly created custom field. If you want to discard your changes, click the icon.
9. In the **Field Type** column, click **Manage Values** to specify the **Lookup Values** for the field.
10. Click **Add Lookup Value**, enter the **Value** in the text field and click to save it.

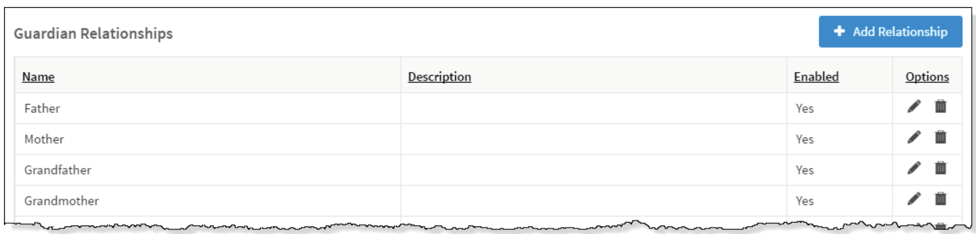
Modify or Delete Guardian Custom Field

To modify a custom guardian field, click the icon in the **Options** column in the **Guardian Custom Fields** area on the **Student Management** workspace and edit the information. Click the icon to save your changes.

To delete a custom guardian field, click the icon in the **Guardian Custom Fields** area on the **Student Management** workspace and then click **OK** on the confirmation dialog.

Manage Guardian Relationships

The **Guardian Relationships** area is used to create the guardian types to be associated with students.

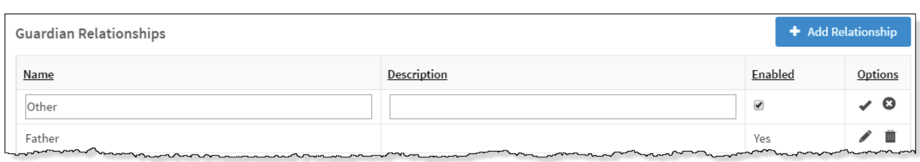


> **Note** When Raptor Link is used, guardian relationships defined in the SIS will be automatically populated.

Add Guardian Relationship

Perform the following procedure to add a guardian relationship:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Students** tab and select **Student Management** from the drop-down menu.
3. In the **Guardian Relationships** area, click **Add Relationship**.



4. In the **Name** text box, enter the relationship name.
5. In the **Description** text box, enter a descriptive information for the item.
6. If you want this field to be enabled on the **Student Sign Out**, **Student Detail** and **Guardian Detail** workspaces, keep the **Enabled** check box selected. Otherwise, clear the check box.

7. Click the ✔ icon to save the information. If you want to discard your changes, click the ✖ icon.

> **Note** The scope of a relationship is determined by the level (client or building) at which it was created.

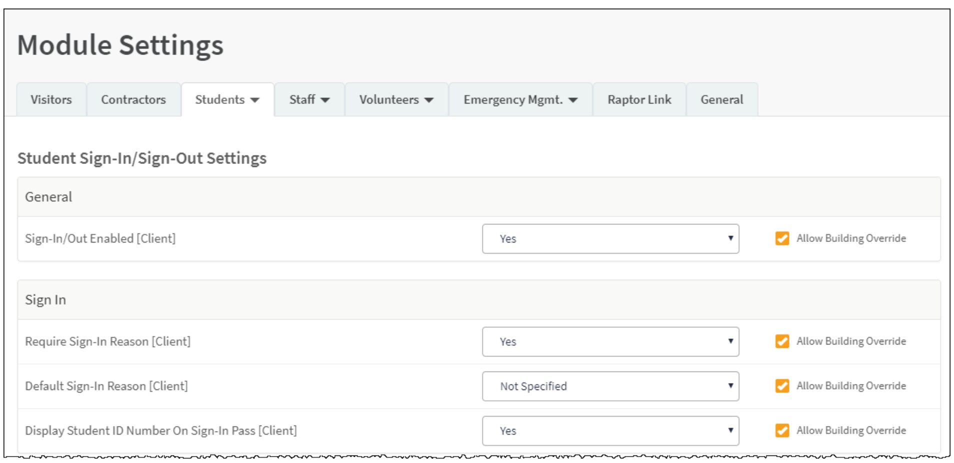
Modify or Delete Guardian Relationships

To modify a guardian relationship item, click the ✎ icon in the **Options** column in the **Guardian Relationships** area on the **Student Management** workspace and edit the information. Click the ✔ icon to save your changes. If you want to discard your changes, click the ✖ icon.

To delete a guardian relationship item, click the 🗑 icon in the **Guardian Relationships** area on the **Student Management** workspace and then click **OK** on the confirmation dialog.

Student Sign-In/Sign-Out Settings

Use the **Student Sign-In/Sign-Out Settings** workspace to specify sign-in and sign-out settings that display during Student Sign In and Sign Out.



Enable/Disable Student Sign In/Out

By default, Raptor is configured with the Student Sign In/Out feature enabled. The feature can be disabled to hide Student Sign In and Sign Out features in the **Sign In/Sign Out** workspace.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Students** tab and select **Student Sign In/Out** from the drop-down menu.

3. From the **Enable Student Sign In/Out** drop-down list, select **Yes** (to enable) or **No** (to disable).
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Specify Student Sign-In Settings

Perform the following steps to specify the fields that display during student sign in:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Students** tab and select **Student Sign In/Out** from the drop-down menu.
3. On the **Student Sign-In/Sign-Out Settings** workspace, specify whether the following fields are required to be completed during sign in and whether the settings can be overridden at the building level:
   - **Require Sign-In Reason** – Select **Yes** or **No** from the drop-down list to specify whether the reason for sign in is required.
   - **Default Sign-In Reason** – Select the default reason that displays when students sign in.
   - **Display Student ID Number On Sign-In Pass** – Select **Yes** or **No** from the drop-down list to specify whether the student ID displays on the sign-in pass (**Yes** is the default setting).
   - **Allow Building Override** – Select or clear the check box for each of the settings. If the check box is selected, the setting can be overridden at the building level.
4. Click **Save Settings**.
5. Log out of Raptor and then log in to see the change.

Specify Student Sign-Out Settings

Perform the following steps to specify the fields that display during student sign out:

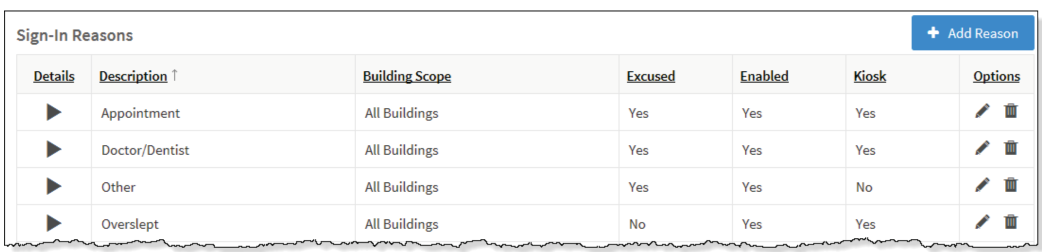
1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Students** tab and select **Student Sign In/Out** from the tab drop-down menu.
3. On the **Student Sign-In/Sign-Out Settings** workspace, specify whether the following fields are required to be completed when students sign out and whether the settings can be overridden at the building level:

- **Require Sign-Out Reason** – Select **Yes** or **No** to specify whether the reason for sign out is required.
- **Default Sign-Out Reason** – Select the default reason that displays when students sign out.
- **Display Student ID Number On Sign-Out Pass** – Select **Yes** or **No** from the drop-down list to specify whether the student ID displays on the sign-out pass (**Yes** is the default setting).
- **Allow One-Time Pickup to Become an Approved Guardian** – Select **Yes** or **No** to indicate whether a one-time pickup can be added to the approved guardian list for a specific student.
- **Allow Building Override** – Select or clear the check box for each of the settings. If the check box is selected, the setting can be overridden at the building level.

4. Click **Save Settings**.
5. Log out of Raptor and then log in to see the change.

Manage Student Sign-In Reasons

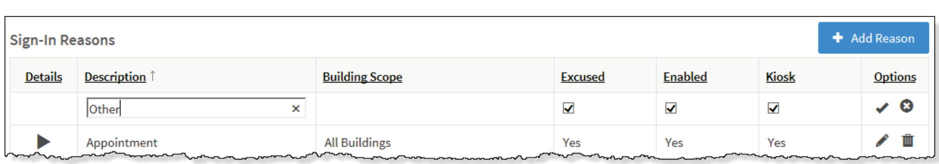
You can view and manage the reasons that display during student sign in from the **Sign-In Reasons** area on the **Sign-In/Sign-Out Settings** workspace.



Add Sign-In Reason

Perform the following steps to add a new reason to display in the drop-down list during student sign in:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Students** tab and select **Student Sign In/Out** from the drop-down menu.
3. In the **Sign-In Reasons** area, click **Add Reason**.

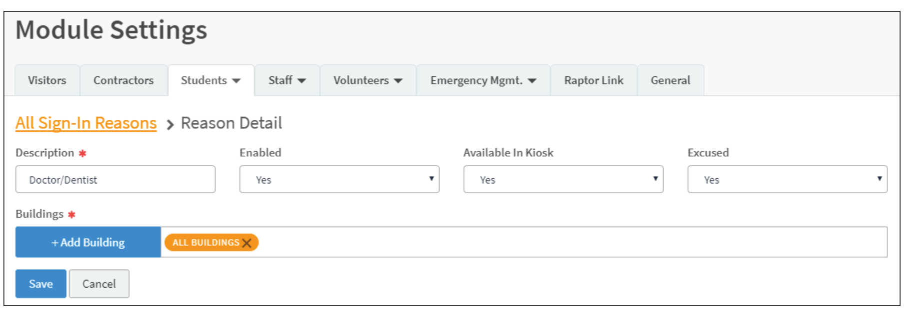


4. Enter a name for the reason in the **Description** text field.
5. The Excused, Enabled, and Kiosk check boxes are selected by default. Perform the following depending on how you want the reason to display in the **Student Sign In** workspace:
   - **Excused** – If you want the reason to be automatically listed as an excused reason, leave the check box selected. Otherwise, clear the check box.
   - **Enabled** – If you want the reason to display in the **Sign In Reason** drop-down list, leave the check box selected. Otherwise, clear the check box.
   - **Kiosk** – If you want the sign-in reason to display on the Kiosk, keep the check box selected. Otherwise, clear the check box.
6. Click the ✔ icon to save the new reason for sign in. If you want to discard your changes, click the ✖ icon.

View or Modify Sign-In Reasons

You can edit or remove reasons for sign in to the drop-down list, enable or disable the item, or change the setting for whether it displays in the Kiosk.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Students** tab and select **Student Sign In/Out** from the drop-down menu.
3. In the **Sign-In Reasons** area, click the ▶ icon to expand the **Reason Detail**.



4. Modify any of the following information:
   - **Description** – Change the **Description** for the reason.
   - **Enabled** – Select **Yes** (to enable) or **No** (to disable) to specify whether the item is currently enabled or disabled.
   - **Available in Kiosk** – Select **Yes** (to enable) or **No** (to disable) to specify whether the item is available in the Kiosk.

- **Excused** – Select **Yes** or **No** to specify whether the reason should be automatically listed as an excused reason.
- **Buildings** –To add a building or building group, click **Add Building** and select the building or building group from the drop-down list. To delete a building, click the **X** on the building label.

5. Click **Save**.

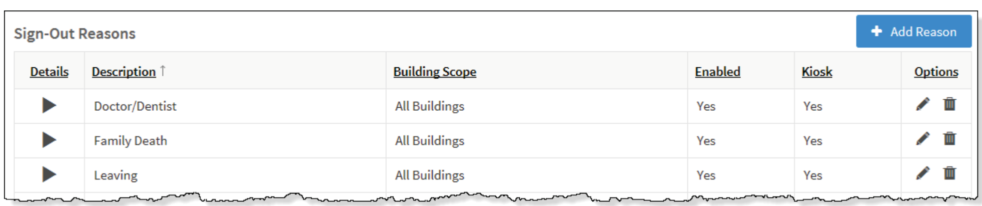
You can also click the icon in the **Options** column in the **Sign-In Reasons** area on the **Student Sign-In/Sign-Out Settings** workspace to edit the **Description** name and enable/disable the **Kiosk** setting and the **Enabled** setting. Click the icon to save your changes. If you want to discard your changes, click the icon.

Delete Sign-In Reasons

To remove a reason, click the icon in the **Sign-In Reasons** area on the **Student Sign-In/Sign-Out Settings** workspace and then click **OK** on the confirmation dialog.

Manage Student Sign-Out Reasons

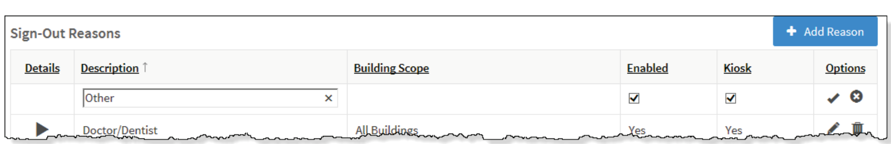
You can view and manage the reasons that display during student sign out from the **Sign-Out Reasons** area on the workspace.



Add Sign-Out Reason

Perform the following steps to add a new reason to display in the drop-down list during student sign out:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Students** tab and select **Student Sign In/Out** from the drop-down menu.
3. In the **Sign-Out Reasons** area, click **Add Reason**.

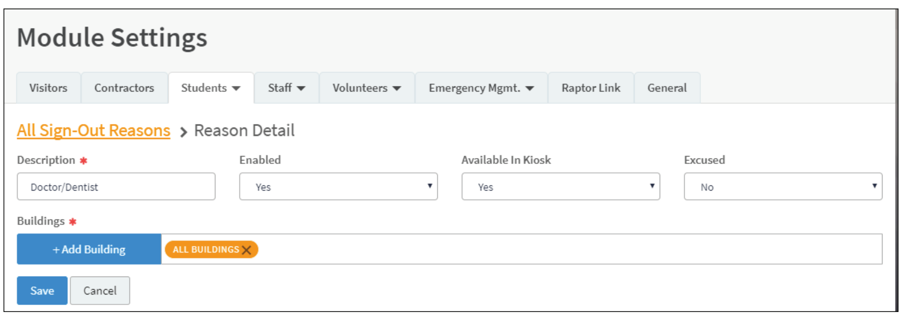


4. Enter a name for the reason in the **Description** text field.
5. The **Enabled** and **Kiosk** check boxes are selected by default. Perform the following depending on how you want the reason to display in the **Student Sign Out** workspace:
   - **Enabled** – If you want the reason to display in the **Sign-Out Reason** drop-down list, leave the check box selected. Otherwise, clear the check box.
   - **Kiosk** – If you want the reason to display on the Kiosk, leave the check box selected. Otherwise, clear the check box.
6. Click the ✔ icon to save the new reason for sign out. If you want to discard your changes, click the ✖ icon.

View or Modify Sign-Out Reasons

You can edit or remove reasons for sign out to the drop-down list, enable or disable the item, or change the setting for whether it displays in the Kiosk.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Students** tab and select **Student Sign In/Out** from the drop-down menu.
3. In the **Sign-Out Reasons** area, click the ▶ icon to expand the **Reason Detail**.



4. Modify any of the following information:
   - **Description** – Change the **Description** for the reason.
   - **Enabled** – Select **Yes** (to enable) or **No** (to disable) to specify whether the item is currently enabled or disabled.
   - **Available in Kiosk** – Select **Yes** (to enable) or **No** (to disable) to specify whether the item is available in the Kiosk.

- **Excused** – Select **Yes** or **No** to specify whether the reason should be automatically listed as an excused reason.
- **Buildings** –To add a building or building group, click **Add Building** and select the building or building group from the drop-down list. To delete a building, click the **X** on the building label.

5. Click **Save**.

You can also click the icon in the **Options** column in the **Sign-Out Reasons** area on the **Student Sign-In/Sign-Out Settings** workspace to edit the **Description** name and enable/disable the **Kiosk** setting and the **Enabled** setting. Click the icon to save your changes. If you want to discard your changes, click the icon.

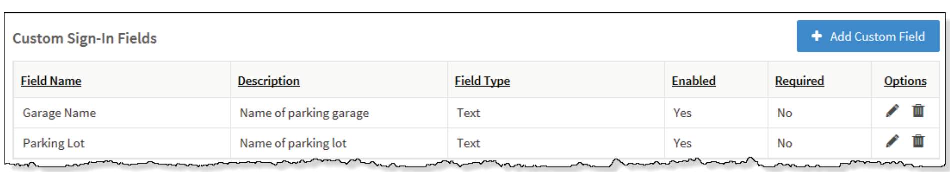
Delete Sign-Out Reason

To remove a reason for sign out, click the icon in the **Sign-Out Reasons** area on the **Student Sign-In/Sign-Out Settings** workspace and then click **OK** on the confirmation dialog.

Manage Custom Sign-In Fields

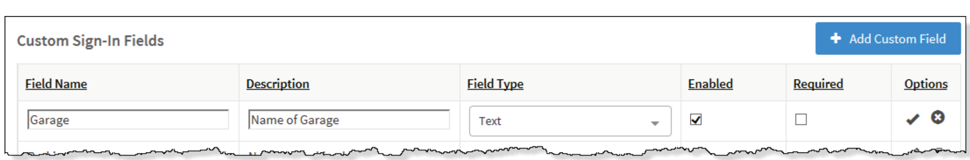
You can create custom sign-in fields that are associated with sign-in events to display on the **Student Sign In** and **Student Delayed Entry** workspaces for all buildings or specific buildings.

An example of a custom sign-in field for a high school is **Parking Lot** with the values for the various parking lots around the school.



Add Custom Sign-In Field

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Students** tab and select **Student Sign In/Out** from the drop-down menu.
3. In the **Custom Sign-In Fields** area, click **Add Custom Field**.



4. Enter the **Field Name** and **Description** in the text fields.
5. From the **Field Type** drop-down list, select the type of field (Lookup, Text, Text Area).
6. Select or clear the **Enabled** check box.
7. If this is a required field that must be completed during visitor sign in, select the **Required** check box.
8. Click the icon to save the newly created custom field. If you want to discard your changes, click the icon.
9. If the Lookup field type is selected, click **Manage Values** to specify the Lookup Values for the field.
10. Click **Add Lookup Value**, enter the **Value** in the text field and click to save it.

Modify or Delete Custom Sign-In Field

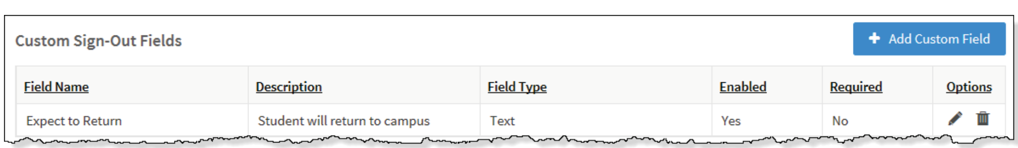
To modify a custom sign-in field, click the icon in the **Options** column in the **Custom Sign-In Fields** area on the **Student Sign-In/Sign-Out Settings** workspace and edit the information. Click the icon to save your changes. If you want to discard your changes, click the icon.

To delete a custom sign-in field, click the icon in the **Custom Sign-In Fields** area on the **Student Sign-In/Sign-Out Settings** workspace and then click **OK** on the confirmation dialog.

Manage Custom Sign-Out Fields

You can create custom sign-out fields that are associated with sign-out events to display on the **Student Sign Out** and **Student Delayed Entry** workspaces for all buildings or specific buildings.

An example of a custom sign-out field is **Expect to Return** with values of **Yes** or **No**. This would inform the Admin if the student was signing out for the day or if they expected to return to the school before the end of the school day.

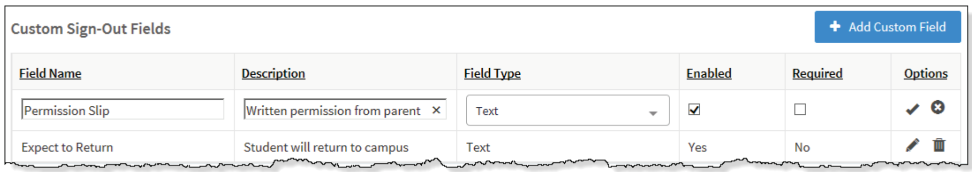

Custom Sign-Out Fields

Add Custom Field

Field Name	Description	Field Type	Enabled	Required	Options
Expect to Return	Student will return to campus	Text	Yes	No	

Add Custom Sign-Out Field

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Students** tab and select **Student Sign In/Out** from the drop-down menu.
3. In the **Custom Sign-Out Fields** area, click **Add Custom Field**.



4. Enter the **Field Name** and **Description** in the text fields.
5. From the **Field Type** drop-down list, select the type of field (Lookup, Text, Text Area).
6. Select or clear the **Enabled** check box.
7. If this is a required field that must be completed during student sign out, select the **Required** check box.
8. Click the ✔ icon to save the newly created custom field. If you want to discard your changes, click the ✖ icon.
9. If the Lookup field type is selected, click **Manage Values** to specify the Lookup Values for the field.
10. Click **Add Lookup Value**, enter the **Value** in the text field and click ✔ to save it.

Modify or Delete Custom Sign-Out Field

To modify a custom sign-out field, click the ✎ icon in the **Options** column in the **Custom Sign-Out Fields** area on the **Student Sign-In/Sign-Out Settings** workspace and edit the information. Click the ✔ icon to save your changes. If you want to discard your changes, click the ✖ icon.

To delete a custom sign-out field, click the 🗑 icon in the **Custom Sign-Out Fields** area on the **Student Sign-In/Sign-Out Settings** workspace and then click **OK** on the confirmation dialog.

Managing Staff Module Settings (Admin)

Use the **Staff** tab on the **Module Settings** workspace to manage the fields that display in the Staff module.

The Staff tab includes a drop-down menu where you can select the workspace in which you want to work:

- **Staff Management Settings** – Use this workspace to specify staff management settings and custom profile fields.
- **Staff Sign In/Out Settings** – Use this workspace to specify staff sign-in and sign-out settings, sign-in and sign-out reasons, and kiosk sign-in settings.

Note You must be at the client level (All Buildings) to see the **Allow Building Override** check box.

Staff Management Settings

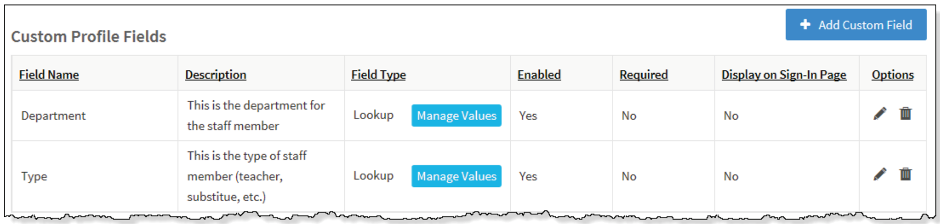
Enable/Disable Staff Management

By default, Raptor is configured with Staff Management enabled. It can be disabled to hide Staff features in the navigation menu, on the **Reports** workspace, and the Staff dashboards.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Staff** tab and select **Staff Management** from the drop-down menu.
3. From the **Staff Management Enabled** drop-down list, select **Yes** (to enable) or **No** (to disable).
4. Select the **Allow Building Override** check box if the setting can be changed at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Manage Custom Profile Fields

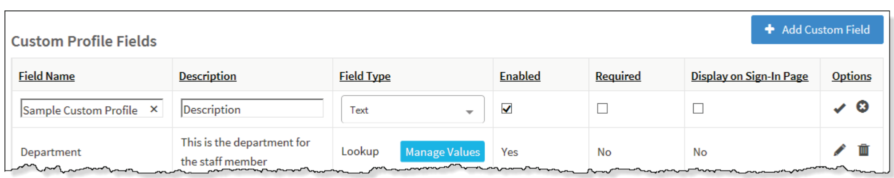
A custom profile field is associated with the staff and this information is displayed on the staff's Detail page. If necessary, it may also be configured to display on the **Sign In/Sign Out** workspace.



Add Custom Profile Field

Perform the following steps to add a custom profile field:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Staff** tab and select **Staff Management** from the drop-down menu.
3. In the **Custom Profile Fields** area, click **Add Custom Field**.



4. Enter the **Field Name** and Description in the text boxes.
5. From the **Field Type** drop-down list, select the type of field (Lookup, Text, Text Area).
6. Select or clear the **Enabled** check box.
7. If this is a required field that must be completed during staff sign in, select the **Required** check box.
8. Select the **Display on Sign-In Page** check box if you want the field to display on the **Sign In** workspace.

> **Note** Custom Profile fields are displayed on the **Sign In** workspace only if the **Display on Sign-In Page** check box is selected. This field displays as read-only unless using the manual entry feature.

9. Click the ✔ icon to save the newly created custom field. If you want to discard your changes, click the ✖ icon.

10. If the **Lookup** field type is selected, click **Manage Values** to specify the Lookup Values for the field.
11. Click **Add Lookup Value**, enter the **Value** in the text field and click to save it.

Modify or Delete Custom Profile Field

To modify a custom profile field, click the icon in the **Options** column in the **Custom Profile Fields** area on the **Staff Management Settings** workspace and edit the information. Click the icon to save your changes.

To delete a custom profile field, click the icon in the **Custom Profile Fields** area on the **Staff Management Settings** workspace and then click **OK** on the confirmation dialog.

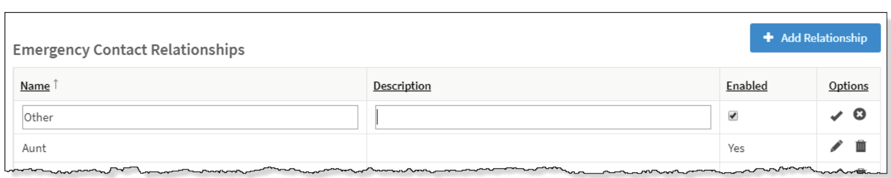
Manage Emergency Contact Relationships REU

Use this area on the **Staff Management Settings** workspace to specify the emergency contact relationships that are available in the **Staff Details** workspace.

Add Relationship

Perform the following steps to add an emergency contact relationship:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Staff** tab and select **Staff Management** from the drop-down menu.
3. In the **Emergency Contact Relationships** area, click **Add Relationship**.



4. Enter the **Name** and optional **Description** in the text boxes, and select or clear the **Enabled** check box.
5. Click the icon to save the emergency contact relationship. If you want to discard your changes, click the icon.

Staff Sign-In/Sign-Out Settings

The **Staff Sign-in/Out Settings** workspace includes settings for sign-in and sign-out activities.

Enable/Disable Staff Sign In/Out

By default, Raptor is configured with the Staff Sign In/Out feature enabled. The feature can be disabled to hide Staff Sign In and Sign Out features in the **Sign In/Sign Out** workspace.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Staff** tab and select **Staff Sign In/Out** from the drop-down menu.
3. From the **Enable Staff Sign In/Out** drop-down list, select **Yes** (to enable) or **No** (to disable).
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Specify Staff Sign-In Settings

Perform the following steps to specify staff sign-in settings:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Staff** tab and select **Staff Sign In/Out** from the tab drop-down menu.

3. Specify whether the following fields are required to be completed during staff sign in and whether individual buildings can override these settings:
   - **Require Sign-In Reason** – Select **Yes** or **No** from the drop-down list to specify whether the reason for sign in is required.
   - **Require Sign-In Reason For** – Select **Only Non-Primary Building Staff** or **All Staff** from the drop-down list to specify who the reason for sign in is required when the staff member is signing into a building.
   - **Display Staff ID Number On Badge** – Select **Yes** or **No** from the drop-down list to specify whether the staff ID displays on the badge (**No** is the default setting).
   - **Allow Building Override** – Select or clear the check box for each of the settings. If the check box is selected, the setting can be overridden at the building level.
4. Click **Save Settings**.
5. Log out of Raptor and then log in to see the change.

Specify Staff Sign-Out Settings

Perform the following steps to specify staff sign-out settings:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Staff** tab and select **Staff Sign In/Out** from the drop-down menu.
3. Specify whether the following field is required during staff sign out and whether buildings can override the setting:
   - **Require Sign-Out Reason** – Select **Yes** or **No** from the drop-down list to specify whether the reason for sign out is required.
   - **Allow Building Override** – Select or clear the check box. If selected, the setting can be overridden at the building level.
4. Click **Save Settings**.
5. Log out of Raptor and then log in to see the change.

Specify Auto Sign-Out Time

By default, Raptor is configured to automatically sign out all staff at 6:00 PM. Users with Administrator permissions can change this time and also specify whether buildings can override this setting.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Staff** tab and select **Staff Sign In/Out** from the drop-down menu.
3. In the **Auto Sign-Out Time** field, click the icon and select the time from the drop-down list.

4. Select the **Allow Building Override** check box if the setting can be overridden at the building level.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

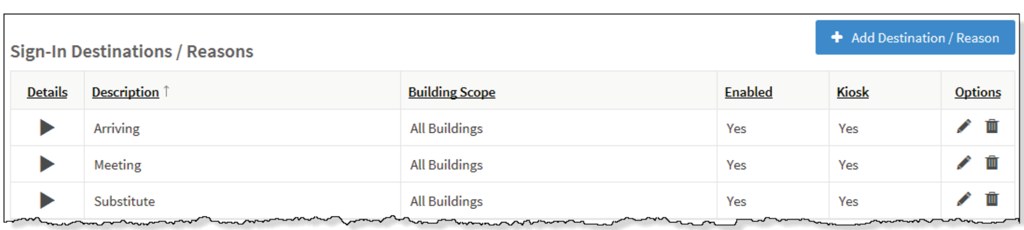
Specify Kiosk Settings

Perform the following steps to specify staff sign-in settings when using the kiosk:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Staff** tab and select **Staff Sign In/Out** from the drop-down menu.
3. Specify whether the following fields are required to be completed during staff sign in on the Kiosk and whether individual buildings can override these settings:
   - **Kiosk Require Sign-In Reason** – Select **Yes** or **No** from the drop-down list to specify whether the reason for sign in is required.
   - **Kiosk Require Sign-In Reason For** – Select **Only Non-Primary Building Staff** or **All Staff** from the drop-down list to specify who the reason for sign in is required when the staff member is signing into a building using the kiosk.
   - **Allow Building Override** – Select or clear the check box for each of the fields. If selected, the setting can be overridden at the building level.
4. Click **Save Settings**.
5. Log out of Raptor and then log in to see the change.

Manage Staff Sign-In Destinations/Reasons

You can view and manage the destinations/reasons that display during staff sign in from the **Sign In Destinations/Reasons** area on the workspace.



Add Sign-In Destinations/Reasons

Perform the following steps to add a new destination/reason to display in the drop-down list during staff sign in:

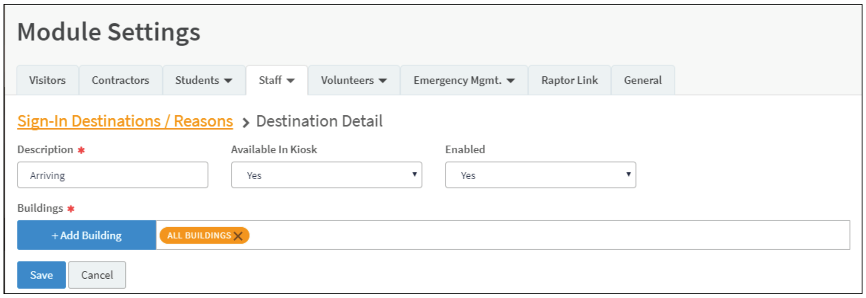
1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Staff** tab and select **Staff Sign In/Out** from the drop-down menu.
3. In the **Sign-In Destinations/Reasons** area, click **Add Destination/Reason**.

4. Enter a name for the reason in the **Description** text field.
5. The **Enabled** and **Kiosk** check boxes are selected by default. Perform the following depending on how you want the reason to display in the **Staff Sign In** workspace:
   - **Enabled** – If you want the reason to display in the Sign In Reason drop-down list, leave the check box selected. Otherwise, clear the check box.
   - **Kiosk** – If you want the sign-in reason to display on the Kiosk, leave the check box selected. Otherwise, clear the check box.
6. Click the ✔ icon to save the new reason for sign in. If you want to discard your changes, click the ✖ icon.

View or Modify Sign-In Destinations/Reasons

You can edit or remove destinations/reasons for sign in to the drop-down list, enable or disable the item, or change the setting for whether it displays in the Kiosk.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Staff** tab and select **Staff Sign In/Out** from the tab drop-down menu.
3. In the **Sign-In Destinations/Reasons** area, click the ▶ icon to expand the **Destination Detail**.



4. Modify any of the following information:
   - **Description** – Change the **Description** for the reason.
   - **Available in Kiosk** – Select **Yes** (to enable) or **No** (to disable) to specify whether the item is available in the Kiosk.
   - **Enabled** – Select **Yes** (to enable) or **No** (to disable) to specify whether the item is currently enabled or disabled.
   - **Buildings** –To add a building or building group, click **Add Building** and select the building or building group from the drop-down list. To delete a building, click the **X** on the building label.
5. Click **Save**.

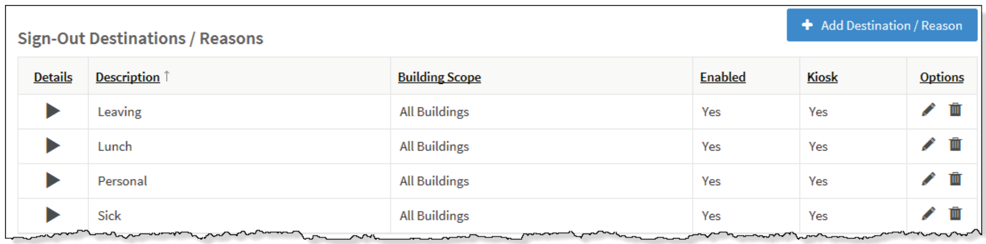
You can also click the icon in the **Options** column in the **Sign-In Destinations/Reasons** area on the **Staff Sign In/Sign-Out Settings** workspace to edit the **Description** name and enable/disable the **Kiosk** setting and the **Enabled** setting. Click the icon to save your changes. If you want to discard your changes, click the icon.

Delete Sign-In Destinations/Reasons

To remove a destination/reason for sign in, click the icon in the **Sign-In Destinations/Reasons** area on the **Staff Sign In/Sign-Out Settings** workspace and then click **OK** on the confirmation dialog.

Manage Sign-Out Destinations/Reasons

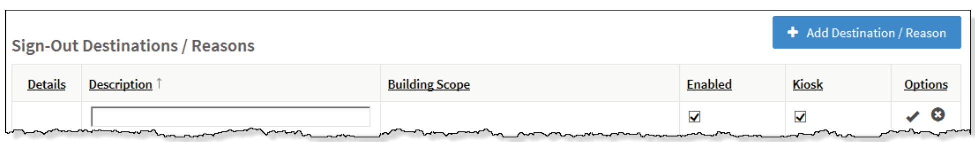
You can view and manage the destination/reasons that display during staff sign out from the **Sign-Out Destinations/Reasons** area on the workspace.



Add Sign-Out Destination/Reason

Perform the following steps to add a new destination/reason to display in the drop-down list during Staff Sign Out:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Staff** tab and select **Staff Sign In/Out** from the drop-down menu.
3. In the **Sign-Out Destinations/Reasons** area, click **Add Destination/Reason**.

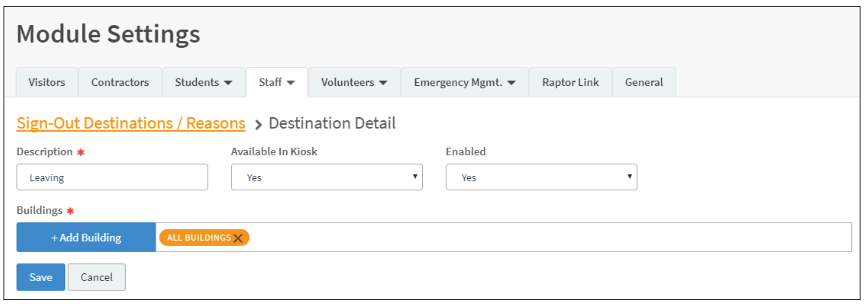


4. Enter a name for the reason in the **Description** text field.
5. The **Enabled** and **Kiosk** check boxes are selected by default. Perform the following depending on how you want the reason to display in the **Staff Sign Out** workspace:
   - **Enabled** – If you want the reason to display in the **Sign-Out Reason** drop-down list, leave the check box selected. Otherwise, clear the check box.
   - **Kiosk** – If you want the reason to display on the Kiosk, leave the check box selected. Otherwise, clear the check box.
6. Click the ✔ icon to save the new reason for sign out. If you want to discard your changes, click the ⊗ icon.

View or Modify Sign-Out Destinations Reasons

You can edit or remove destinations/reasons for sign out to the drop-down list, enable or disable the item, or change the setting for whether it displays in the Kiosk.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Staff** tab and select **Staff Sign In/Out** from the tab drop-down menu.
3. In the **Sign-Out Destinations/Reasons** area, click the icon to expand the Destination Detail.



4. Modify any of the following information:

- **Description** – Change the **Description** for the reason.
- **Available in Kiosk** – Select **Yes** (to enable) or **No** (to disable) to specify whether the item is available in the Kiosk.
  - **Enabled** – Select **Yes** (to enable) or **No** (to disable) to specify whether the item is currently enabled or disabled.
  - **Buildings** –To add a building or building group, click **Add Building** and select the building or building group from the drop-down list. To delete a building, click the **X** on the building label.

5. Click **Save**.

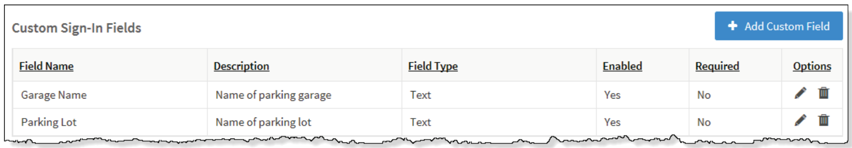
You can also click the icon in the **Options** column in the **Sign-Out Destinations/Reasons** area on the **Staff Sign In/Sign-Out Settings** workspace to edit the **Description** name and enable/disable the **Kiosk** setting and the **Enabled** setting. Click the icon to save your changes. If you want to discard your changes, click the icon.

Delete Sign-Out Destination/Reason

To remove a destination/reason for sign out, click the icon in the **Sign-Out Destinations/Reasons** area on the **Staff Sign In/Sign-Out Settings** workspace and then click **OK** on the confirmation dialog.

Manage Staff Custom Sign-In Fields

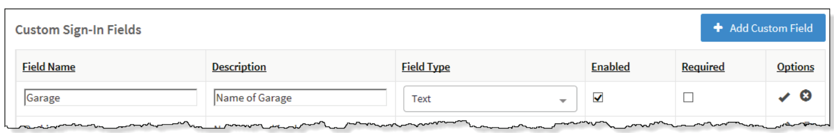
You can create custom sign-in fields that are associated with sign-in events to display on the **Staff Sign In** and **Staff Delayed Entry** workspaces for all buildings or specific buildings.



Add Custom Sign-In Field

Perform the following steps to add a custom sign-in field:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Staff** tab and select **Staff Sign In/Out** from the drop-down menu.
3. In the **Custom Sign-In Fields** area, click **Add Custom Field**.



4. Enter the **Field Name** and **Description** in the text fields.
5. From the **Field Type** drop-down list, select the type of field (Lookup, Text, Text Area).
6. Select or clear the **Enabled** check box.
7. If this is a required field that must be completed during staff sign in, select the **Required** check box.
8. Click the ✔ icon to save the newly created custom field. If you want to discard your changes, click the ✖ icon.
9. If the Lookup field type is selected, click **Manage Values** to specify the Lookup Values for the field.
10. Click **Add Lookup Value**, enter the Value in the text field and click ✔ to save it.

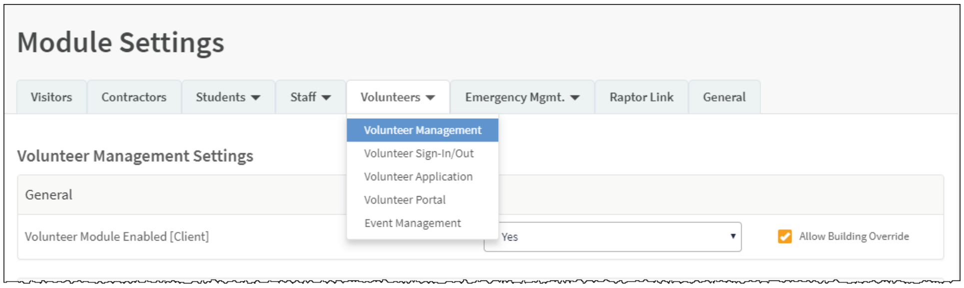
Modify or Delete Custom Sign-In Fields

To modify a custom sign-in field, click the ✎ icon in the **Options** column in the **Custom Sign-In Fields** area on the **Staff Sign In/Sign-Out Settings** workspace and edit the information. Click the ✔ icon to save your changes.

To delete a custom sign-in field, click the 🗑 icon in the **Custom Sign-In Fields** area on the **Staff Sign In/Sign-Out Settings** workspace and then click **OK** on the confirmation dialog.

Managing Volunteer Module Settings (Admin)

Use the **Volunteers** tab on the **Module Settings** workspace to manage the fields that display in the Volunteer module.

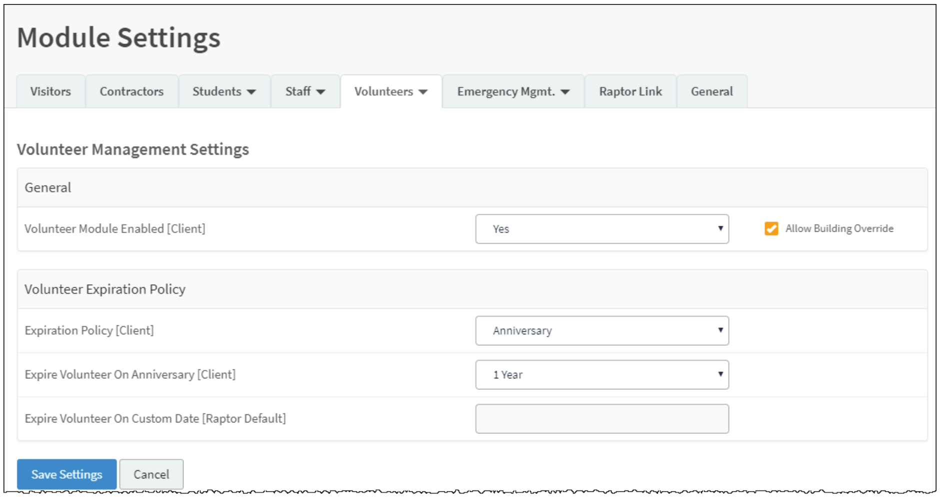


The **Volunteers** tab includes a drop-down menu where you can select the workspace in which you want to navigate:

- **Volunteer Management Settings** – This workspace is used to manage what displays on the Volunteer workspace, including volunteer expiration policy, functions, organizations, affiliations, and custom profile fields.
- **Volunteer Sign-In/Sign-Out Settings** – This workspace is used manage volunteer sign-in and sign-out settings, and custom sign in fields.
- **Volunteer Application Settings** – This workspace is available is used to manage volunteer application settings, notifications and online volunteer applications.
- **Volunteer Portal Settings** – This workspace is used to manage the volunteer portal settings.
- **Event Management Settings** – This workspace is used to enable volunteer event management.

Volunteer Management Settings

The **Volunteer Management Settings** workspace is used to manage what displays on the Volunteer workspace, including volunteer expiration policy, functions, organizations, affiliations, and custom profile fields.



Enable/Disable Volunteer Module

By default, Raptor is configured with the Volunteer Module enabled, however, the module can be disabled to hide Volunteer features in the navigation menu, including Volunteer Reports, Volunteer Sign In/Sign Out, and the Volunteer dashboards.

> **Note** If you disable the Volunteer Module, all associated features will also be disabled (Volunteer Management, Volunteer Sign In/Out, Volunteer Application, Volunteer Events, and Volunteer Portal). Subsequently, when you enable the Volunteer Module, you will then need to enable all the other features that were previously disabled.

Perform the following steps to enable or disable the Volunteer Module:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select Volunteer Management from the drop-down menu.
3. In the **Volunteer Module Enabled** field, select **Yes** (to enable) or **No** (to disable) from the drop-down list.
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.

6. Log out of Raptor and then log in to see the change.

Specify Volunteer Expiration Policy

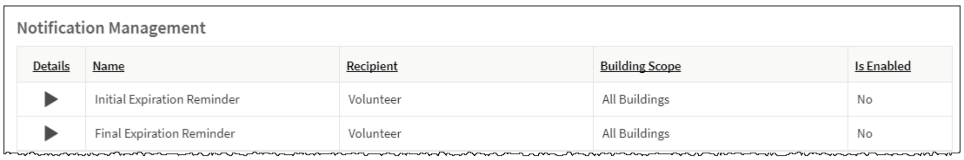
Users with Administrative permissions can specify when a volunteer's ability to volunteer for functions will automatically expire, at which time they will be required to resubmit a volunteer application.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Volunteer Expiration Policy** area, specify the following information:
   - **Expiration Policy** – Select one of the following options from the drop-down list to specify how the expiration policy will be implemented:
     - **None** – No expiration policy will be set for volunteers. If this option is selected, the **Expire Volunteer on Anniversary** and **Expire Volunteer On Custom Date** fields will be disabled (grayed out).
     - **Anniversary** – If this option is selected, Volunteers will be expired on the anniversary date of application approval. You must select the anniversary year in the **Expire Volunteer On Anniversary** field.
     - **Custom Date** – Select this option to be able to select a date from the calendar in the **Expire Volunteer On Custom Date** field to specify the expiration policy.
   - **Expire Volunteer On Anniversary** – This field is enabled if the **Expiration Policy** is set to **Anniversary**. From the drop-down list, select the anniversary year on which to expire the volunteer. By default, the expiration is set to **1 Year**.
   - **Expire Volunteer On Custom Date** – This field is enabled if the **Expiration Policy** is set to **Custom Date**. From the calendar icon, select the date on which to expire all volunteers.
4. Click **Save Settings**.
5. Log out of Raptor and then log in to see the change.

Manage Expiration Notifications

You can manage volunteer expiration notifications from **Notification Management** area on the **Volunteer Management Settings** workspace. The following notifications are available:

- **Initial Expiration Reminder** – This notification will be sent to a volunteer as a first reminder that their term as a volunteer will expire.
- **Final Expiration Reminder** -- This notification will be sent to a volunteer as a final reminder that their term as a volunteer will expire.

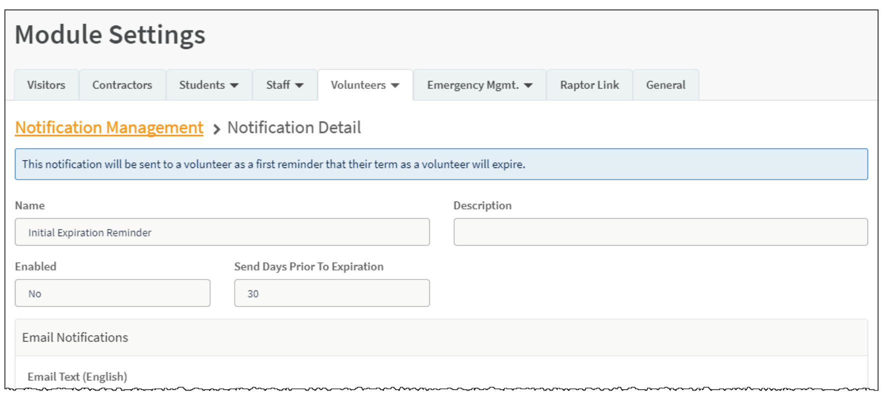

Notification Management

Details	Name	Recipient	Building Scope	Is Enabled
▶	Initial Expiration Reminder	Volunteer	All Buildings	No
▶	Final Expiration Reminder	Volunteer	All Buildings	No

> **Note** Notifications can only be managed at the client level (All Buildings).

Specify Notifications

1. In the **Notification Management** area, click the ▶ icon in the **Details** column to expand the **Notification Detail**.



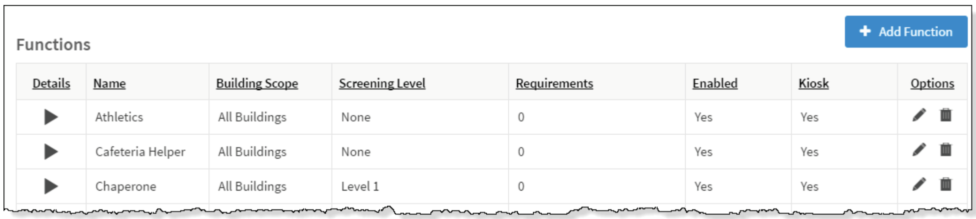
2. Specify the following information:
   - **Name** – This field is *read-only* and cannot be changed.
   - **Description** – Enter an optional description about the notification.
   - **Enabled** – Select **Yes** or **No** to indicate whether the notification is enabled (active).
   - **Send Days Prior To Expiration** – Select the number of days the notification is to be sent prior to the volunteer's expiration date.

- **Email Text** – Use the default message that will be sent in an email or modify it with a custom email message.

3. Click **Save**.

Manage Functions

You can view and manage the functions that display during volunteer sign in from the **Functions** area on the **Volunteer Management Settings** workspace.

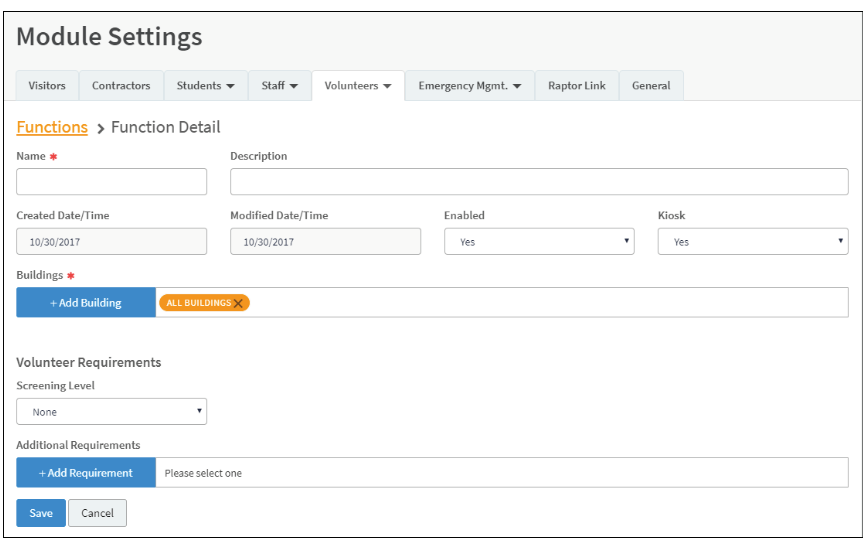


Note Functions can only be managed at the client level (All Buildings).

Add Function

Perform the following steps to add a new function to display in the drop-down list during volunteer sign in:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Functions** area, click **Add Function**.



4. Enter a **Name*** and **Description** for the function.

5. The **Enabled** and **Kiosk** fields are set to **Yes** by default. Perform the following depending on how you want the function to display in the **Volunteer Sign In** workspace:
   - **Enabled** – Select **Yes** (to enable) or **No** (to disable) to specify whether the item is currently enabled or disabled.
   - **Kiosk** – Select **Yes** (to enable) or **No** (to disable) to specify whether the item is available in the Kiosk.
6. In the **Buildings*** field, click **Add Building** and select the building or building group from the drop-down list. To delete a building, click the **X** on the building label.
7. In the **Screening Level** field, select the criminal background screening level required for the function (None, Level 1, Level 2 or Level 3).

> **Note** Criminal background screening can only be accomplished on volunteer applications received from the online volunteer application and not with imported applications or applications that are created by users.

8. In the **Additional Requirements** field, click **Add Requirement** and select the requirement(s) associated with the function.

> **Note** To use this feature, one or more requirements must already be created. See Manage Requirements.

9. Click **Save**.

View or Modify Function

You can edit or remove a function, enable or disable, or change the setting for whether it displays in the Kiosk.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Functions** area, click the ▶ icon to expand the **Function Detail**.
4. Modify any of the following information:
   - **Name*** – Modify the name of the function.
   - **Description** – Modify the description for the function.
   - **Enabled** – Select **Yes** (to enable) or **No** (to disable) to specify whether the item is currently enabled or disabled.
   - **Kiosk** – Select **Yes** (to enable) or **No** (to disable) to specify whether the item is available in the Kiosk.

- **Buildings*** – To add a building or building group, click **Add Building** and select the building or building group from the drop-down list. To delete a building, click the **X** on the building label.
- **Screening Level** – Select the criminal background screening level required for the function (None, Level 1, Level 2 or Level 3).

> **Notes**
>
> - When the criminal background screening feature is disabled, the only option available is None.
> - Criminal background screening can only be done on volunteer applications received from the online volunteer application and not with imported applications or applications that are created by users.

- **Additional Requirements** – Click **Add Requirement** and select the requirement(s) associated with the function.

5. Click **Save**.

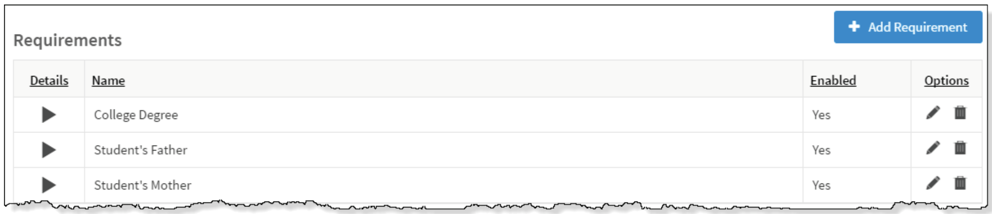
You can also click the icon in the **Options** column in the **Functions** area on the **Volunteer Management Settings** workspace to edit the **Name** and enable/disable the **Kiosk** setting and the **Enabled** setting. Click the icon to save your changes. If you want to discard your changes, click the icon.

Delete Function

To remove a function, click the icon in the **Functions** area on the **Volunteer Management Settings** workspace and then click **OK** on the confirmation dialog.

Manage Requirements

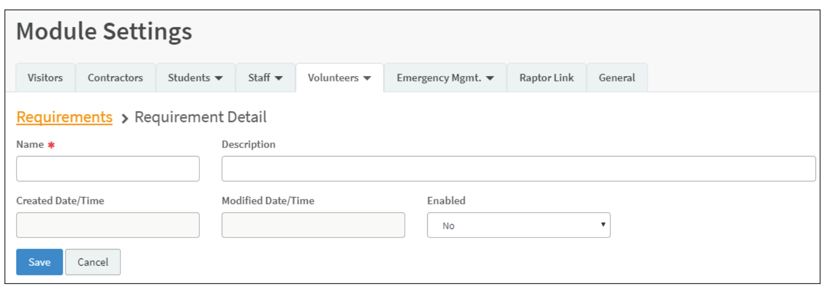
The **Requirements** area on the **Volunteer Management Settings** workspace is used to view and manage requirements that can be associated to functions and displayed during the application approval process.



Add Requirement

Perform the following steps to add a new requirement to associate with a function:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Requirements** area, click **Add Requirement**.



4. Enter a **Name*** and **Description** for the requirement.
5. In the **Enabled** field, select **Yes** (to enable) or **No** (to disable) to specify whether the requirement is currently enabled or disabled.
6. Click **Save**.

View or Modify Requirement

You can edit the requirement name and description, and enable or disable it.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Requirements** area, click the ▶ icon to expand the **Requirement Detail**.
4. Modify any of the following information:
   - **Name*** – Modify the name of the requirement.
   - **Description** – Modify the description for the requirement.
   - **Enabled** – Select **Yes** (to enable) or **No** (to disable) to specify whether the requirement is currently enabled or disabled.
5. Click **Save**.

You can also click the ✏ icon in the **Options** column in the **Requirements** area on the **Volunteer Management Settings** workspace to edit the **Name** and the **Enabled** setting. Click the ✔ icon to save your changes. If you want to discard your changes, click the ✖ icon.

Delete Requirement

To remove a requirement, click the 🗑 icon in the **Requirements** area on the **Volunteer Management Settings** workspace and then click **OK** on the confirmation dialog.

> **Note** A warning message displays if you attempt to delete a requirement that is associated with one or more functions.

Manage Organizations

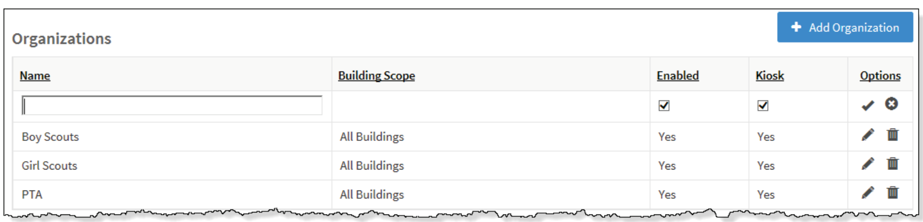
When a volunteer signs in, the **Organization** drop-down list is one of the fields that displays. This field indicates the organization who the volunteer is representing in the Raptor system. You can view and manage the organizations that display during volunteer sign in from the **Organizations** area on the **Volunteer Management Settings** workspace.

> **Note** Organizations can only be managed at the client level (All Buildings).

Add Organization

Perform the following steps to add a new organization to display in the drop-down list during volunteer sign in:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Organizations** area, click **Add Organization**.



4. Enter a **Name** for the organization in the text field.
5. The **Enabled** and **Kiosk** check boxes are selected by default. Perform the following depending on how you want the organization to display in the **Volunteer Sign In** workspace:
   - **Enabled** – If you want the organization to display on the **Sign In** workspace, leave the check box selected. Otherwise, clear the check box.
   - **Kiosk** – If you want the organization to display on the Kiosk, leave the check box selected. Otherwise, clear the check box.
6. Click the ✔ icon to save the new organization. If you want to discard your changes, click the ⊗ icon.

View or Modify Organization

You can edit or remove organization, enable or disable the item, or change the setting for whether it displays in the Kiosk.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Organizations** area, click the icon and modify the following information:
   - **Name** – Modify the name of the organization.
   - **Enabled** – Select the check box (to enable) or clear the check box (to disable).
   - **Kiosk** – Select the check box (to enable) or clear the check box (to disable) the organization on the Kiosk.
4. Click the icon to save the organization. If you want to discard your changes, click the icon.

Delete Organization

To remove an organization, click the icon in the **Organizations** area on the **Volunteer Management Settings** workspace and then click **OK** on the confirmation dialog.

Manage Affiliations

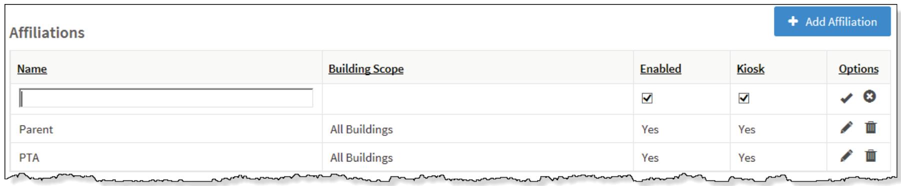
You can view and manage the affiliations that display on the **Volunteer Application** or in the **Volunteer Detail** from the **Affiliations** area on the **Volunteer Management Settings** workspace. This field indicates the relationship of the person to a student who attends the school (for example, mother, father, or uncle).

Note Affiliations can only be managed at the client level (All Buildings).

Add Affiliation

Perform the following steps to add a new affiliation to display in the drop-down list during volunteer sign in:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Affiliations** area, click **Add Affiliation**.



4. Enter a **Name** for the affiliation in the text field.
5. The **Enabled** and **Kiosk** check boxes are selected by default. Perform the following depending on how you want the affiliation to display in the **Volunteer Sign In** workspace:
    - **Enabled** – If you want the affiliation to display on the **Sign In** workspace, leave the check box selected. Otherwise, clear the check box.
    - **Kiosk** – If you want the affiliation to display on the Kiosk, leave the check box selected. Otherwise, clear the check box.
6. Click the icon to save the new affiliation. If you want to discard your changes, click the icon.

View or Modify Affiliation

You can edit or remove affiliations, enable or disable the item, or change the setting for whether it displays in the Kiosk.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Affiliations** area, click the icon and modify the following information:
    - **Name** – Modify the name of the affiliation.
    - **Enabled** – Select the check box (to enable) or clear the check box (to disable).
    - **Kiosk** – Select the check box (to enable) or clear the check box (to disable).
4. Click the icon to save the affiliation. If you want to discard your changes, click the icon.

Delete Affiliation

To remove an affiliation, click the icon in the **Affiliations** area on the **Volunteer Management Settings** workspace and then click **OK** on the confirmation dialog.

Manage Custom Profile Fields

A custom profile field is associated with the volunteer (such as eye color) and this information is displayed on the volunteer's Details page. If necessary, it may also be configured to display on the **Sign In/Sign Out** workspace.

> **Note** A volunteer custom profile field is automatically added to the volunteer application and the online volunteer application.

Add Custom Profile Fields

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Custom Profile Fields** area, click **Add Custom Field**.

4. Enter the **Field Name** and **Description** in the text boxes.
5. From the **Field Type** drop-down list, select the type of field (Lookup, Text, Text Area).
6. Select or clear the **Enabled** check box.
7. If this is a required field that must be completed during volunteer sign in, select the **Required** check box.
8. Select the **Display on Sign-In Page** check box if you want the field to display on the **Sign In** workspace.

   > **Note** Custom Profile fields are displayed on the Sign In workspace only if the **Display on Sign-In Page** check box is selected. This field displays as read-only unless using the manual entry feature.

9. In the **Order** column, specify the order in which the custom profile field displays on the on the Volunteer Detail workspace, the Personal Information page of the online volunteer application, and the Application Detail workspace. By default, the fields appear in the order in which they were created.

   > **Note** You must edit each custom profile field to change the sequence order.

10. Click the ✔ icon to save the newly created custom field. If you want to discard your changes, click the ⊗ icon.
11. If the Lookup field type is selected, click **Manage Values** to specify the Lookup Values for the field.
12. Click **Add Lookup Value**, enter the **Value** in the text field and click ✔ to save it.

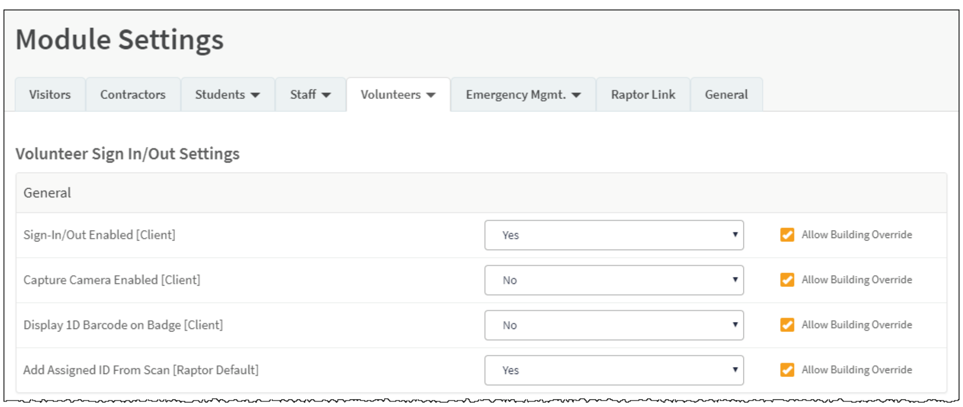
Modify or Delete Custom Profile Fields

To modify a custom profile field, click the ✎ icon in the **Options** column in the **Custom Profile Fields** area on the **Volunteer Management Settings** workspace and edit the information. Click the ✔ icon to save your changes. If you want to discard your changes, click the ⊗ icon.

To delete a custom profile field, click the 🗑 icon in the **Custom Profile Fields** area on the **Volunteer Management Settings** workspace and then click **OK** on the confirmation dialog.

Volunteer Sign In/Sign Out Settings

The **Volunteer Sign-in/Out Settings** workspace includes settings for sign-in and sign-out activities.



Enable/Disable Volunteer Sign In/Out

By default, Raptor is configured with the **Volunteer Sign In/Out** feature enabled. The feature can be disabled to hide Volunteer Sign In and Sign Out features in the **Sign In/Sign Out** workspace.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Sign In/Out** from the drop-down menu.

3. From the **Sign In/Out Enabled** drop-down list, select **Yes** (to enable) or **No** (to disable).
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Enable/Disable Capture Camera

You use this setting to enable or disable the camera feature on the **Sign In/Sign Out** workspace. By default, this setting is disabled.

> **Note** A camera is required to use this feature.
>
> If you are using a Windows Internet Explorer (IE) browser, you must have Adobe Flash Player installed to use the Capture Camera feature.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers tab** and select **Volunteer Sign In/Out** from the drop-down menu.
3. In the **Camera Capture Enabled** field, select **Yes** (to enable) or **No** (to disable) from the drop-down list.
4. Select the **Allow Building Override** check box if the setting can be changed at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Add Assigned ID From Scan

Users with the *Can Manage Volunteer Settings* permission can specify whether to allow a 1D barcode to be captured from a volunteer's ID card and populated in the **Assigned ID** field for that volunteer.

Perform the following steps to enable or disable this feature:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Sign In/Out** from the drop-down menu.
3. In the **Add Assigned ID From Scan** field, select **Yes** (to enable) or **No** (to disable) from the drop-down list.
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.

6. Log out of Raptor and then log in to see the change.

Display 1D Barcode on Badge

Users with Administrative permissions can control whether a 1D barcode is printed on the volunteer badge. If the 1D barcode is printed on the badge, the volunteer can simply scan the code on their badge when signing out at the front desk or kiosk.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Sign In/Out** from the drop-down menu.
3. In the **Display 1D Barcode on Badge** field, select **Yes** (to enable) or **No** (to disable) from the drop-down list.
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Specify Sign-In Settings

Users with Administrative permissions can specify the fields that are required to be completed during volunteer sign in.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers tab** and select **Volunteer Sign In/Out** from the drop-down menu.
3. Specify whether the following field is required to be completed during sign in and whether individual buildings can override these settings:
   - **Volunteer Can Sign In to Any Building** – Select **Yes** or **No** from the drop-down list to specify whether the Find search returns the volunteers name when they sign into any building in the district; not just those buildings listed on their volunteer application.
   - **Require Sign-In Organization** – Select **Yes** or **No** from the drop-down list to specify whether an organization is required during volunteer sign in.
   - **Allow Building Override** – Select or clear the check box for each of the fields. If selected, the settings can be overridden at the building level. Otherwise, clear the check boxes.
4. Click **Save Settings**.
5. Log out of Raptor and then log in to see the change.

Specify Auto Sign-Out Time

By default, Raptor is configured to automatically sign out all volunteers at 6:00 PM. Users with Administrator permissions can change this time and also specify whether the setting can be changed at the building level.

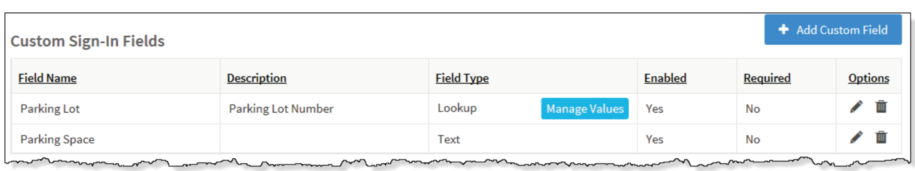
1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers tab** and select **Volunteer Sign In/Out** from the drop-down menu.
3. In the **Auto Sign-Out Time** field, click the icon and select the time from the drop-down list.
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Manage Custom Sign-In Fields

You can create custom sign-in fields that are associated with sign-in events (such as Parking Space) to display on the **Volunteer Sign In** and **Volunteer Delayed Entry** workspaces for all buildings or specific buildings.

Add Custom Sign-In Field

1. In the navigation menu, select **Admin > Module Settings**.
2. On the **Volunteers** tab, click the drop-down menu and select **Volunteer Sign In/Sign Out**.
3. In the **Custom Sign-In Fields** area, click **Add Custom Field**.



4. Enter the **Field Name** and **Description** in the text fields.
5. From the **Field Type** drop-down list, select the type of field (Lookup, Text, Text Area).
6. Select or clear the **Enabled** check box.
7. If this is a required field that must be completed during volunteer sign in, select the **Required** check box.
8. Click the icon to save the newly created custom field. If you want to discard your changes, click the icon.

9. If the Lookup field type is selected, click **Manage Values** to specify the Lookup Values for the field.
10. Click **Add Lookup Value**, enter the Value in the text field and click to save it.

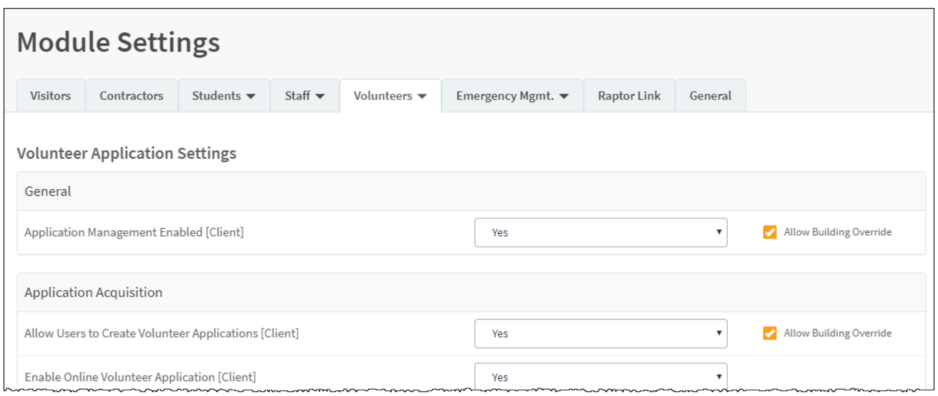
Modify or Delete Custom Sign-In Fields

To modify a custom sign-in field, click the icon in the **Options** column in the **Custom Sign-In Fields** area on the **Volunteer Sign In/Sign Out Settings** workspace and edit the information. Click the icon to save your changes. If you want to discard your changes, click the icon.

To delete a custom sign-in field, click the icon in the **Custom Sign-In Fields** area on the **Volunteer Sign In/Sign Out Settings** workspace and then click **OK** on the confirmation dialog.

Volunteer Application Settings

The **Volunteer Application Settings** workspace includes settings for volunteer applications.



Enable/Disable Application Management

By default, Raptor is configured with the Volunteer Application Management feature enabled, however, the feature can be disabled to hide these settings.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers tab** and select **Volunteer Application** from the drop-down menu.
3. From the **Application Management Enabled** drop-down list, select **Yes** (to enable) or **No** (to disable).
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.

5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Specify Application Acquisition Settings

Users with the *Can Manage Volunteer Settings* permission can specify the settings for how volunteer applications are managed.

Perform the following steps to specify the volunteer application acquisition settings:

1. In the navigation menu, select **Admin > Module Settings**.
2. In the **Application Acquisition** area, specify the following settings:
   - **Allow Users to Create Volunteer Applications** – Select **Yes** (to enable) or **No** (to disable) to indicate whether users can create volunteer applications on the **All Volunteers** workspace.

     Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
   - **Enable Online Volunteer Application** – Select **Yes** (to enable) or **No** (to disable) to indicate whether the online applicants can complete and submit an application from an internet browser.
   - **Application Return URL** – Enter the URL where the browser will be sent when a volunteer applicant clicks Finish on the last page of the online volunteer application.

     > **Note** URLs ending with a forward slash (/) are not supported.
   - **Enable Spanish Localization** – If the *Online Volunteer Application* feature is enabled, you can also enable the application form to display in Spanish. Select **Yes** (to enable) or **No** (to disable).

- **Enable Driver License Field on Application** – If the *Online Volunteer Application* feature is enabled, you can also enable the **Driver License** field to display on the application form. Select **Yes** (to enable) or **No** (to disable).
- **Driver License Is Required** – If the Driver License field is enabled on the online volunteer application form, you can specify whether it is a required field. Select **Yes** (is required) or **No** (not required).
- **District Email Address** – Enter the email address that will be displayed on the Personal Information page of the online volunteer application to be used if the applicant does not have an email address.

3. Click **Save Settings**.
4. Log out of Raptor and then log in to see the change.

Specify Approval Queue Settings

Users with the *Can Manage Volunteer Settings* permission can enable or disable the automatic approval of a volunteer application when all requirements are met, such as no matches to possible sex offender alerts, a clean criminal background screening and all custom defined requirements.

You can also enable automated notifications to the Building Volunteer Coordinator when a volunteer has been approved.

Perform the following steps to enable these features:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers tab** and select **Volunteer Application** from the drop-down menu.
3. Specify the following information:
   - **Automatically Approve When Requirements Satisfied** – Select **Yes** (to enable) or **No** (to disable) to enable or disable automatic approval of volunteer applications when requirements have been satisfied.
   - **Notify Building Volunteer Coordinator On Approval** – Select **Yes** (to enable) or **No** (to disable) to enable or disable automatic notifications to the Building Volunteer Coordinator associated with the same buildings selected on the application, when volunteer applications have been approved.

> **Note** This feature requires the **Application Approved - Internal Notification** to be enabled.

Allow Building Override – Select the check box if the setting can be overridden at the building level. Otherwise, clear the check box.

- **Texas DPS User ID** – Enter the Texas DPS user ID to be referenced when creating a new batch of volunteer applications that are formatted specifically for Texas DPS.

4. Click **Save Settings**.
5. Log out of Raptor and then log in to see the change.

Specify Application Renewal Policy

Users with the *Can Manage Volunteer Settings* permission can select the number of days prior to the volunteer's expiration date at which time the volunteer can submit a new application. The renewal options are in 30-day increments.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers tab** and select **Volunteer Application** from the drop-down menu.
3. From the **Allow Application Renewal Prior to Expiration** drop-down list, select the number of days prior to expiration that the volunteer can resubmit a volunteer application (30 Days is the default).

   To disable this feature, select **Never** from the drop-down list.
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Notification Management

Use the **Notification Management** area on the **Volunteer Application Settings** workspace to enable and disable the notifications that are automatically sent to volunteer applicants and to people who are specified in contacts during the application process.

Notification Management

Details	Name	Recipient	Building Scope	Is Enabled
▶	Application Received	Applicant	All Buildings	Yes
▶	Application Approved	Applicant	All Buildings	Yes
▶	Application Renewal Notice	Volunteer	All Buildings	No
▶	Application Approved - Internal Notification	Client Contacts	All Buildings	Yes
▶	Volunteer Application Disclaimer	Client Contacts	All Buildings	Yes
▶	Application Requires Attention	Client Contacts	All Buildings	Yes
▶	Application Denied	Client Contacts	All Buildings	Yes

> **Note** Contacts must be defined prior to using this feature where the applicant is the recipient of the notification.

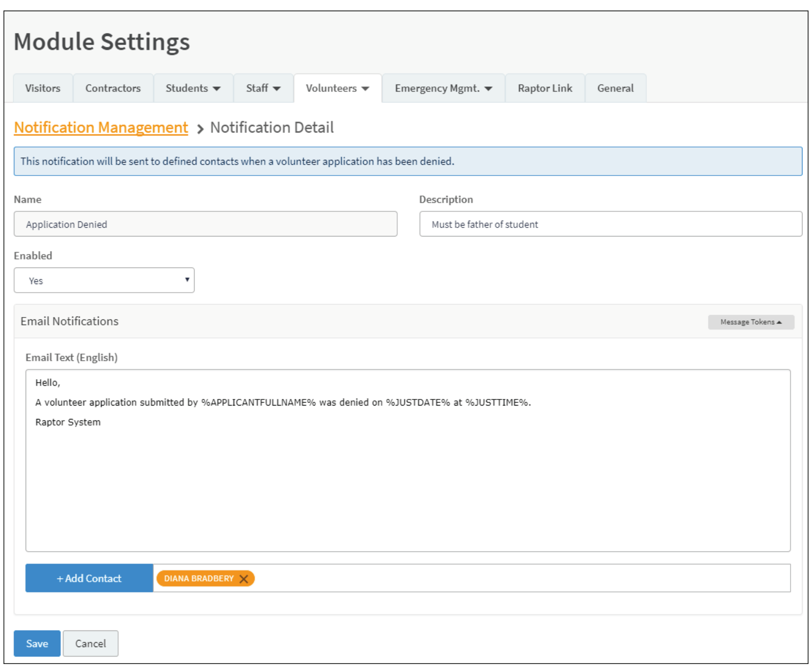
The following notifications are available:

- **Application Received** – This notification will be sent to volunteer applicants upon receipt of their application. Only the applicant will receive this notification.
- **Application Approved** – This notification will be sent to volunteer applicants upon approval of their application. Only the applicant will receive this notification.
- **Application Renewal Notice** – This notification will be sent to active volunteers when their application renewal window begins as defined by the volunteer application renewal policy.
- **Application Approved - Internal Notification** – This notification will be sent to volunteer coordinator contacts when an application has been approved. One or more contacts can be specified to receive this notification.
- **Volunteer Application Disclaimer** – This notification will be sent to the volunteer coordinator contacts when the applicant has read and accepted the disclaimer on the volunteer application.
- **Application Requires Attention** – This notification will be sent to volunteer coordinator contacts when an application needs attention. One or more contacts can be specified to receive this notification.

- **Application Denied** – This notification will be sent to volunteer coordinator contacts when an application has been denied. One or more contacts can be specified to receive this notification.
- **Criminal Background Screening Maintenance** – This notification will be sent to volunteer coordinator contacts notifying them that the volunteer application service is entering maintenance mode. This applies only to customers who have the criminal background screening feature enabled.
- **Criminal Background Screening Funds Low Depleted or Replenished** – This notification will be sent to the specified client contact when the criminal background screening low funds threshold has been met, the fund is depleted, or when the fund has been replenished.
- **Volunteer Portal User Account Creation Failed** – This notification will be sent to volunteer coordinator contacts when a volunteer portal user account fails to be created because the email address is already being used by another user account. One or more contacts can be specified to receive this notification.

Perform the following steps to set up automatic notifications:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers tab** and select **Volunteer Application** from the drop-down menu.
3. In the **Notification Management** area, click the ▶ icon in the **Details** column next to the Template to be modified.



4. Depending on the notification, specify the information in the following fields:
   - **Enabled** – Select **Yes** (enable) or **No** (disable) to indicate whether the notification should be enabled.
   - **Description** – Optionally, enter a description for the notification.
   - **Email Text** – Enter the message that will be sent via email. You can also use Message Tokens for Volunteer Application Notifications to compile the message.
   - **Email Contacts** – Click **Add Contact** and select the contact name from the drop-down list. The contact information must be added prior to creating the email notification.

     > **Notes**
     > - In the **Add Contact** drop-down list, the icons that display represent the contact's preferred method of notification.
     > - If the contact has selected both Text and Email as their preferred notification method, when one method is populated with the contact name, the other method will be automatically populated.

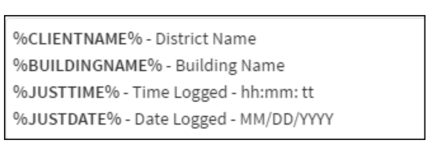
     To remove an email contact, click the **X** in the contact label.

     > **Note** If the contact name is gray, it was defined at the district level and cannot be removed at the building level.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Message Tokens for Volunteer Application Notifications

You can also use **Message Tokens**, which are variables, in the notification message so that when the message is sent, the tokens will be replaced by their associated value.

Click **Message Tokens** to view the variables that can be entered in the message.



%CLIENTNAME% - District Name
%BUILDINGNAME% - Building Name
%JUSTTIME% - Time Logged - hh:mm: tt
%JUSTDATE% - Date Logged - MM/DD/YYYY

Example:

Congratulations. Your application has been approved and you are now able to volunteer at %CLIENTNAME%.

Manage Online Volunteer Application Page

Use the **Online Volunteer Application Page** area on the **Volunteer Application Settings** workspace to manage the online volunteer application page that can be accessed from your district website.

View Online Application URLs

If the Online Volunteer Application feature is enabled, the URLs to access the online volunteer application are generated in the Online Volunteer Application Page Management area in the lower portion of the **Volunteer Application Settings** workspace.

You can use these URLs to display on your client website.

> **Note** If the Online Volunteer Application feature is disabled, these fields will be disabled. You must enable the feature to enable the URL fields.

Perform the following steps to view the URLs:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers tab** and select **Volunteer Application** from the drop-down menu.
3. In the **Online Volunteer Application Page Management** area on the **Volunteer Application Settings** workspace, view the URLs in the appropriate fields:
   - **English Language URL** –If Online Volunteer Application is enabled, the URL to access the English language online volunteer application displays in this field.
   - **Spanish Language URL** – If Spanish Localization is enabled, the URL to access the Spanish language online volunteer application displays in this field.

Specify Online Volunteer Application Content

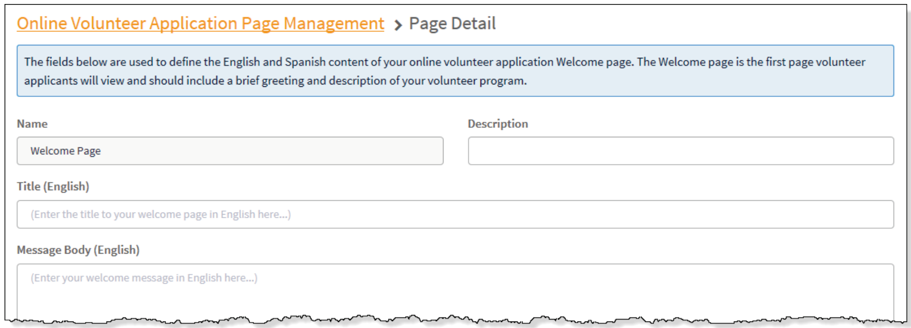
Users with the *Can Manage Volunteer Settings* permission can specify the text that displays on the following pages of the online volunteer application.

Details	Name	Building Scope
▶	Welcome Page	All Buildings
▶	Existing Volunteer Page	All Buildings
▶	Duplicate Application Page	All Buildings
▶	Disclaimer Page	All Buildings
▶	Closing Page	All Buildings
▶	Application Service Unavailable Page	All Buildings

- **Welcome Page** – This is the first page that displays in the online volunteer application.
- **Existing Volunteer Page** – This page displays for a volunteer who has already been approved but who is resubmitting an online volunteer application.
- **Duplicate Applications Page** – This page displays when a person is attempting to apply using the online volunteer application however that person already has an application under review.
- **Disclaimer Page** – This page displays before the application Closing page.
- **Closing Page** – This is the last page of the online volunteer application.
- **Application Service Unavailable Page** – This page displays when the online volunteer application is down due to maintenance.

Perform the following steps to specify the content that displays on the online volunteer application:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers tab** and select **Volunteer Application** from the drop-down menu.
3. In the **Online Volunteer Application Page Management** area on the workspace, click the ▶ icon in the **Details** column for the **[page name]**.



4. On the **Page Detail** workspace, specify the following information:
   - **Title (English)** – Enter the title that should be displayed on the Welcome page of the English language online volunteer application.
   - **Message Body (English)** – Enter the welcome message that should be displayed on the Welcome page of the English language online volunteer application.
   - **Title (Spanish)** – Enter the title that should be displayed on the Welcome page of the Spanish language online volunteer application.
   - **Message Body (Spanish)** -- Enter the welcome message that should be displayed on the Welcome page of the Spanish language online volunteer application.

     Note If the Spanish language online application is disabled, you must enable it before the fields will be enabled.
5. Click **Save**.

Volunteer Portal Settings

The **Volunteer Portal Settings** workspace enables users with the *Can Manage Volunteer Settings* permission to manage the volunteer portal.

Enable/Disable Volunteer Portal

Use this feature to enable or disable the volunteer portal.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Portal** from the drop-down menu.
3. From the **Volunteer Portal Enabled** drop-down list, select **Yes** (to enable) or **No** (to disable). By default, the volunteer portal is disabled.
4. Click **Save Settings**.
5. Log out of Raptor and then log in to see the change.

Allow Volunteers to Add Hours

Use this feature to specify whether volunteers can add or edit hours they have worked in the volunteer portal.

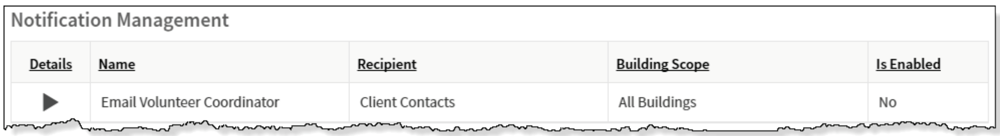
> **Note** The **Allow Volunteers to Add Hours** setting displays only when the **Enable/Disable Volunteer Portal** setting is enabled.

1. In the navigation menu, select **Admin > Module Settings** and then click the **Volunteers** tab.
2. From the **Allow Volunteers to Add Hours** drop-down list, select **Yes** (to allow) or **No** (to not allow).
3. Click **Save Settings**.
4. Log out of Raptor and then log in to see the change.

Notification Management

Use the **Notification Management** area on the **Volunteer Portal Settings** workspace to enable and disable the email notification that is sent to the Volunteer Coordinator when a volunteer selects the Contact Volunteer Coordinator option in the Volunteer Portal, and to specify the contacts who receive the email notification.

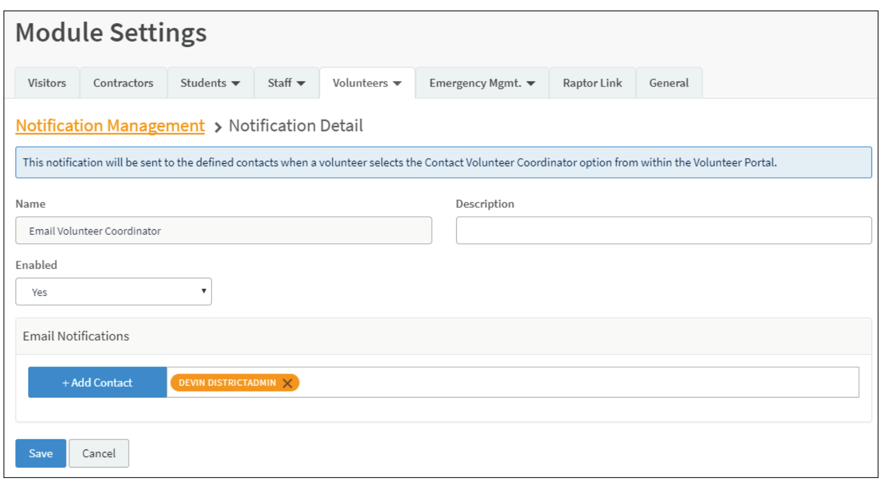
> **Note** This grid only displays when the **Enable/Disable Volunteer Portal** setting is enabled.



> **Note** Contacts must be defined prior to using this feature.

Perform the following steps to set up automatic notifications:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers tab** and select **Volunteer Portal** from the drop-down menu.
3. In the **Notification Management** area, click the ▶ icon in the **Details** column.



4. On the **Notification Detail** workspace, specify the following information:
   - **Enabled** – Select **Yes** (enable) or **No** (disable) to indicate whether the notification should be enabled.
   - **Email Notifications** – Click **Add Contact** and select the contact name from the drop-down list. The contact information must be added in Contacts prior to creating the email notification.

     To remove an email contact, click the **X** in the contact label.

     > **Note** If the contact name is gray, it was defined at the district level and cannot be removed at the building level.

5. Click **Save Settings**.

Access Volunteer Portal URL

This feature generates a client-specific URL to access the Volunteer Portal. This URL will also be provided in the Volunteer Approval notification to applicants when the Volunteer Portal is enabled, and the applicant has provided a valid email address.

> **Note** If the Volunteer Portal is disabled, this field will be blank.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Portal** from the drop-down menu.
3. In the **Volunteer Portal Access** area on the workspace, view the URL in the **Volunteer Portal URL** field.

4. Copy the URL into your browser to access the volunteer portal for your district. You can also include this URL on your district website for volunteers to access the volunteer portal.

Event Management Settings

The **Volunteer Event Settings** workspace enables users with the *Can Manage Volunteer Settings* permission to manage the volunteer event settings in Raptor.

Enable/Disable Volunteer Event Management

Use this feature to enable or disable volunteer event management.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Portal** from the drop-down menu.
3. From the **Volunteer Event Management Enabled** drop-down list, select **Yes** (to enable) or **No** (to disable).
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Managing Emergency Mgmt Module Settings (Admin)

Use the Drill Manager or **Emergency Mgmt** tab on the **Module Settings** workspace to manage the settings specific to Drill Manager and Raptor Reunification®. How the settings display in the **Module Settings** workspace depends on whether your district had Raptor Reunification enabled.

Raptor Reunification Enabled

If your district has Raptor Reunification enabled, the **Module Settings** workspace includes the **Emergency Mgmt** tab and drop-down menu where you can select the workspace in which you want to work:

- **Drill Manager** – Use this workspace to enable the Drill Manager module, and manage notifications for drills.
- **Reunification**REU – Use this workspace to manage the settings specific to the reunification application.

You must have the *Can Manage Reunification* Settings permission to access these workspaces.

> **Note** The screen captures in this section assume Raptor Reunification is enabled, and the **Emergency Mgmt** drop-down menu displays.

Raptor Reunification Not Enabled

If your district does ***not*** have Raptor Reunification enabled, the **Module Settings** workspace includes only the **Drill Manager** tab. Users must have the *Can Manage Client Settings* or *Can Manage Building Settings* permission to view this workspace.

Drill Manager

Drill Manager enables you to manage the drills that will be used during emergencies.

Enable/Disable Drill Manager

Perform the following steps to enable or disable Drill Manager:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Drill Manager** tab, or click the **Emergency Mgmt** tab and select **Drill Manager**.
3. From the **Drill Manager Enabled** drop-down list, select **Yes** (to enable) or **No** (to disable).
4. Select the **Allow Building Override** check box if the setting can be changed at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Notification Management

Use the **Notification Management** area on the **Drill Manager Settings** workspace to enable and disable the notifications that are automatically sent to the specified contacts about upcoming drills and drill requirements.

Notification Management

Details	Name	Delivery	Recipient	Enabled
▶	Upcoming Drill Summary (Per Building)	Sent on the first day of the month	Client Contacts	Yes
▶	Drill Reminder (Per Requirement)	Sent five days prior to drill due date	Client Contacts	Yes
▶	Reminder Summary (All Buildings)	Sent five days prior to drill due date	Client Contacts	No
▶	End of Month Summary (All Buildings)	Sent on the first day of the month	Client Contacts	No

Note Contacts must be defined prior to setting up notifications.

The following notifications are available:

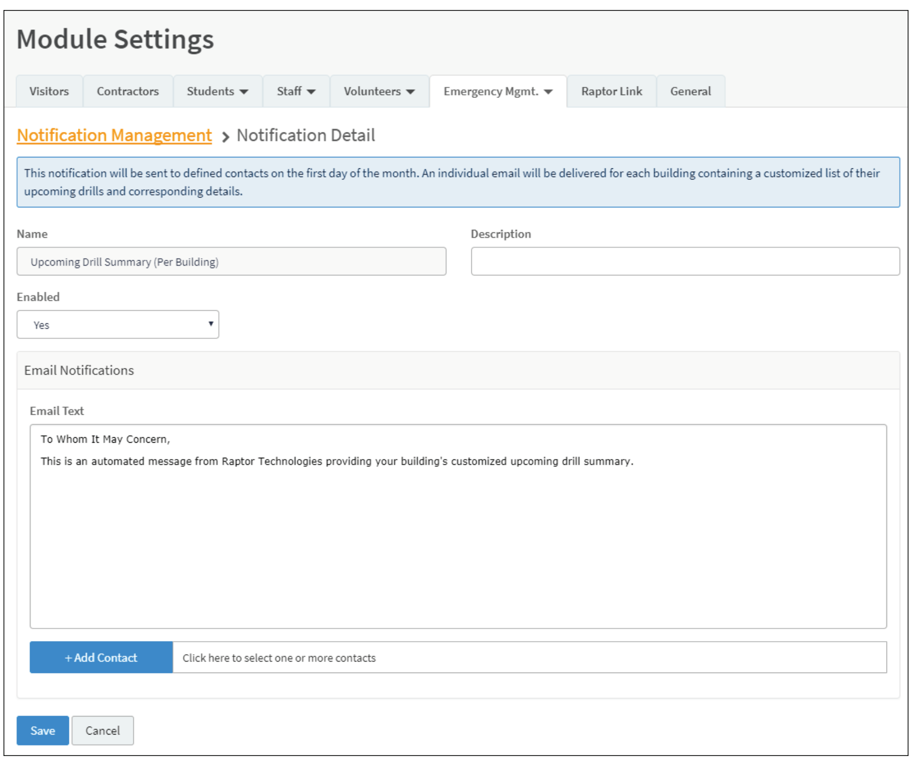
- **Upcoming Drill Summary (Per Building)** – This notification will be sent to defined contacts on the first day of the month. An individual email will be delivered for each building containing a customized list of their upcoming drills and corresponding details.
- **Drill Reminder (Per Requirement)** – This notification will be sent to defined contacts five days prior to the drill due date, only if the drill requirement has not been completed. An individual email will be delivered for each drill requirement, by building, containing the drill details that is at risk of being out of compliance.

- **Reminder Summary (All Buildings)** – This notification is only available at the All Buildings level and will be sent to defined contacts five days prior to the drill due date. The reminder summary contains a list of all buildings that have not completed a specific drill requirement and are at risk of being out of compliance. An individual email reminder summary will be delivered for each drill requirement due in five days.
- **End of Month Summary (All Buildings)** – This notification is only available at the All Buildings level and will be sent to defined contacts on the first day of the month. The End of Month Summary provides a breakdown by building of each drill requirement due during the month and their status.

Enable/Disable Notifications

Perform the following steps to enable automatic notifications:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Drill Manager** tab, or click the **Emergency Mgmt** tab and select **Drill Manager**.
3. In the **Notification Management** area, click the ▶ icon in the **Details** column for the notification.



4. Specify the information in the following fields:
   - **Enabled** – Select **Yes** (enable) or **No** (disable) to indicate whether the notification should be enabled.
   - **Description** – Optionally, enter a description for the notification.
   - **Email Text** – Enter the message that will be sent via email.
   - **Contacts** – Click **Add Contact** and select the contact name from the drop-down list. The contact information must be added prior to creating the email notification.

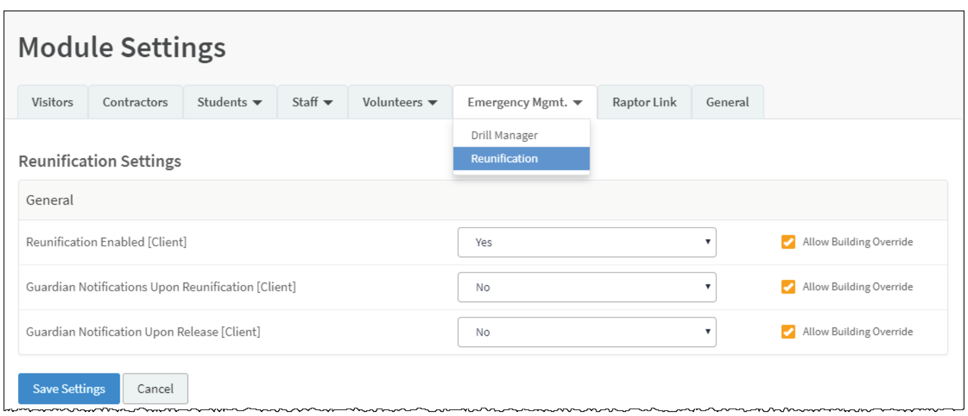
     Note In the **Add Contact** drop-down list, the icons that display represent the contact's preferred method of notification.

   To remove an email contact, click the **X** in the contact label.
5. Click **Save**.

Raptor Reunification

The Raptor Reunification System helps ensure that students are tracked, accounted for, and reunited with their parents or guardians safely and as efficiently as possible during emergency events. The Raptor Reunification System can be implemented as a standalone product or integrated with the Raptor System.

When integrated with the Raptor System, users can manage the administrative tasks in Raptor from the **Emergency Mgmt > Reunification Settings** workspace.



Enable/Disable Reunification Module

Perform the following steps to enable or disable the reunification module:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Emergency Mgmt** tab and select **Reunification** from the drop-down menu.
3. From the **Reunification Enabled** drop-down list, select **Yes** (to enable) or **No** (to disable).
4. Select the **Allow Building Override** check box if the setting can be changed at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Enable/Disable Guardian Notifications Upon Reunification

During the reunification process, guardians can be notified when the student has been reunified with another parent or guardian. Perform the following steps to enable or disable guardian notifications:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Emergency Mgmt** tab and select **Reunification** from the drop-down menu.
3. From the **Guardian Notifications Upon Reunification** drop-down list, select **Yes** (to enable) or **No** (to disable).
4. Select the **Allow Building Override** check box if the setting can be changed at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Enable/Disable Guardian Notification Upon Release

During a controlled release process, parents or guardians can be notified when a student has been released from school. Perform the following steps to enable or disable guardian notifications:

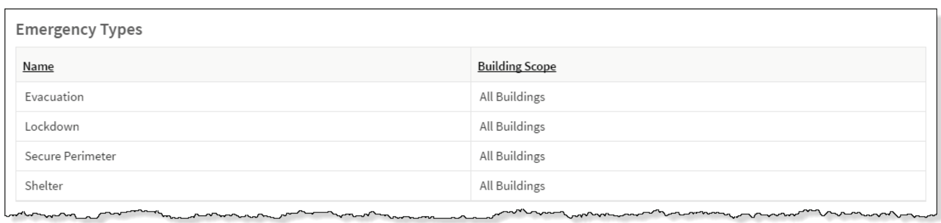
1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Emergency Mgmt** tab and select **Reunification** from the drop-down menu.
3. From the **Guardian Notification Upon Release** drop-down list, select **Yes** (to enable) or **No** (to disable).
4. Select the **Allow Building Override** check box if the setting can be changed at the building level. Otherwise, clear the check box.

View Emergency Types

The **Emergency Types** are pre-defined, system default categories that are read-only and cannot be modified. Emergency Type categories hold user-defined sub-types that are used when initiating incidents in the product.

> **Note** When creating an Emergency Sub-Type, it must be categorized in one of the Emergency Types.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Emergency Mgmt** tab and select **Reunification** from the drop-down menu.
3. View the **Emergency Types** in the grid. The name and building scope display.


Emergency Types

Name	Building Scope
Evacuation	All Buildings
Lockdown	All Buildings
Secure Perimeter	All Buildings
Shelter	All Buildings

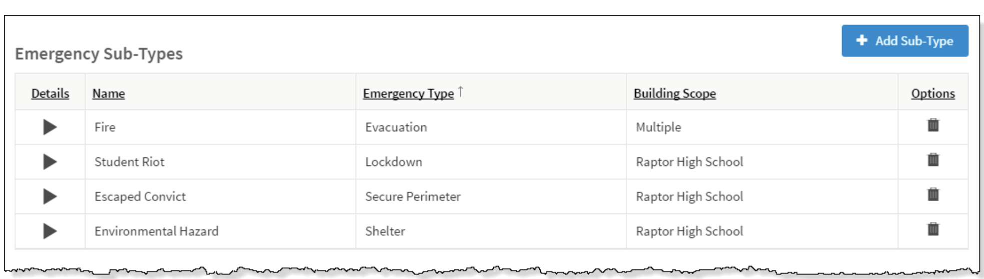
Manage Emergency Sub-Types

The **Emergency Sub-Types** area on the **Reunification Settings** workspace are user-defined and specific to a pre-defined emergency type. The Reunification module ships with out-of-the-box values to be used as an example and modified based on your district's operations plan.

You can view, create, modify and delete emergency sub-types.

View and Modify Emergency Sub-Types

The **Emergency Sub-Types** display in a grid on the **Reunification Settings** workspace. The name, emergency type and building scope display.

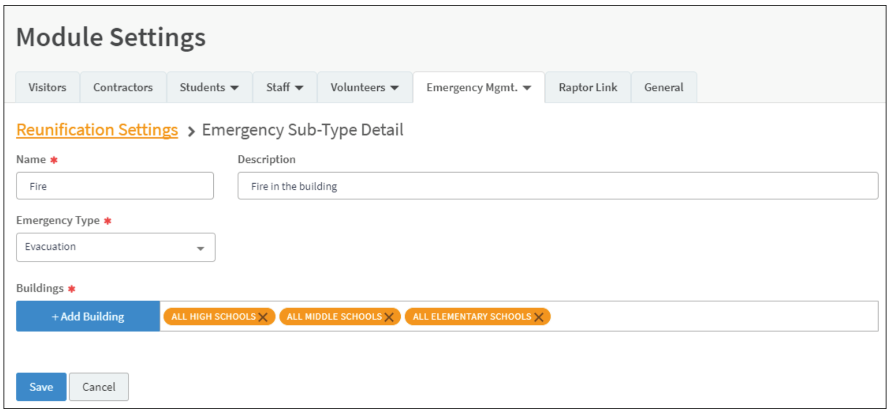

Emergency Sub-Types

Add Sub-Type

Details	Name	Emergency Type	Building Scope	Options
▶	Fire	Evacuation	Multiple	
▶	Student Riot	Lockdown	Raptor High School	
▶	Escaped Convict	Secure Perimeter	Raptor High School	
▶	Environmental Hazard	Shelter	Raptor High School	

Perform the following steps to view the details for an emergency sub-type:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Emergency Mgmt** tab and select **Reunification** from the drop-down menu.
3. In the **Emergency Sub-Types** area, click the ▶ icon in the **Details** column to view the information about the emergency sub-type.



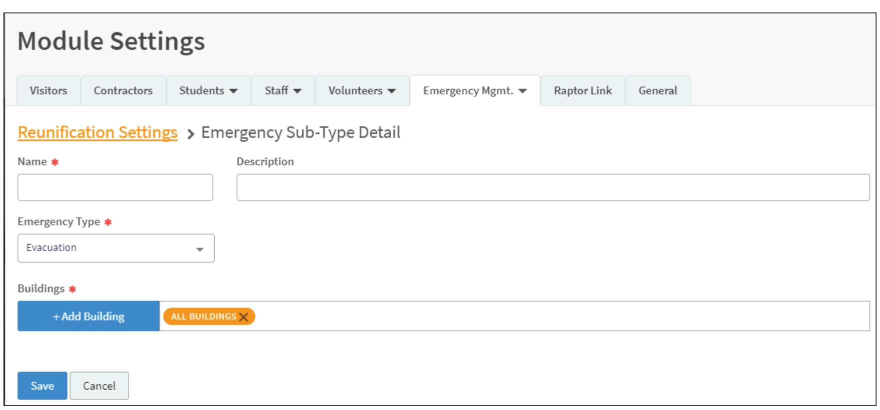
4. Modify any of the information and click **Save**.

Create Emergency Sub-Type

You can create a new emergency sub-type that is available for all buildings or specific buildings.

Perform the following steps to create a new emergency sub-type:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Emergency Mgmt** tab and select **Reunification** from the drop-down menu.
3. In the **Emergency Sub-Types** area, click **Add Sub-Type**.



4. Enter the following information to define the emergency sub-type:
   - **Name*** – Enter a name for the emergency sub-type.
   - **Description** – Optionally, enter text that describes the emergency sub-type.
   - **Emergency Type*** – Select the emergency type from the drop-down list in which this emergency sub-type is categorized.
   - **Buildings*** – Click **Add Building** and select the building, a building group, or All Buildings from the drop-down list.
5. Click **Save**.

Delete Emergency Sub-Type

Perform the following steps to delete an emergency sub-type from the **Reunification Module Settings** workspace.

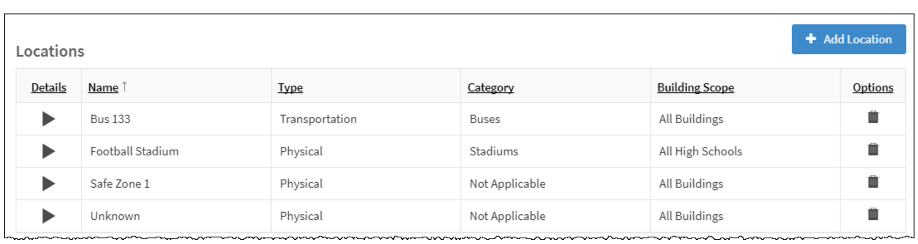
1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Emergency Mgmt** tab and select **Reunification** from the drop-down menu.
3. In the **Emergency Sub-Types** area, click the icon for the item to be removed.
4. Click **OK** on the confirmation dialog to complete the process.

Manage Locations

The **Locations** area on the **Reunification Settings** workspace is used to manage the physical and transportation locations used during a drill or live emergency. From this area, users with the *Can Manage Reunification Settings* permission can view, create, modify and delete locations.

View and Modify Locations

The **Locations** display in a grid on the **Reunification Settings** workspace. The name, type, category and building scope display.



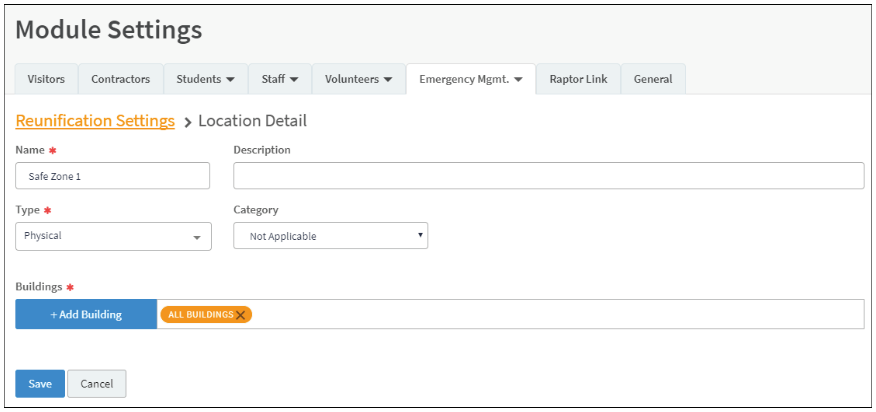
Locations

+ Add Location

Details	Name ↑	Type	Category	Building Scope	Options
▶	Bus 133	Transportation	Buses	All Buildings	
▶	Football Stadium	Physical	Stadiums	All High Schools	
▶	Safe Zone 1	Physical	Not Applicable	All Buildings	
▶	Unknown	Physical	Not Applicable	All Buildings	

Perform the following steps to view the details for a location:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Emergency Mgmt** tab and select **Reunification** from the drop-down menu.
3. In the **Locations** area, click the ▶ icon in the **Details** column to view the information about the location.



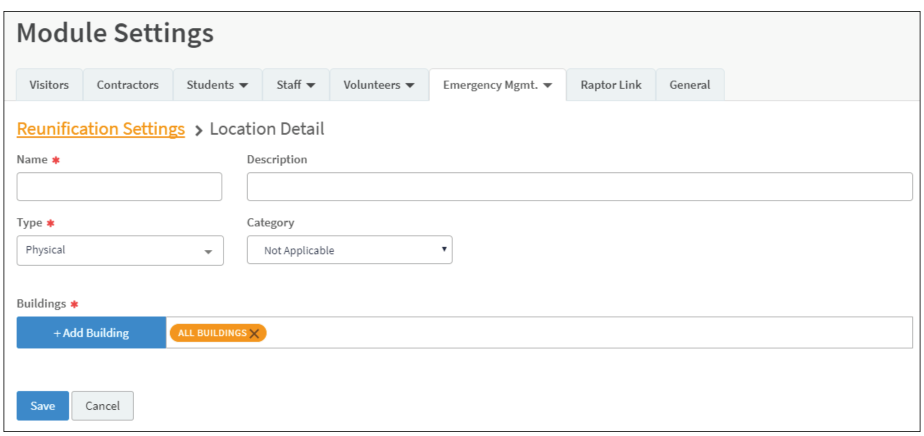
4. Modify any of the information and click **Save**.

Create Location

You can create a location that is available for all buildings or specific buildings.

Perform the following steps to create a new location:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Emergency Mgmt** tab and select **Reunification** from the drop-down menu.
3. In the **Locations** area, click **Add Location**.



4. Enter the following information to define the location:
   - **Name*** – Enter the name of the location.
   - **Description** – Optionally, enter text that describes the location.
   - **Type*** – Select the location type (**Physical** or **Transportation**) from the drop-down list.
   - **Category** – Optionally, select the category for the location.
   - **Buildings*** – Click **Add Building** and select the building, a building group, or All Buildings from the drop-down list.
5. Click **Save**.

Delete Location

Perform the following steps to delete a location from the **Reunification Settings** workspace.

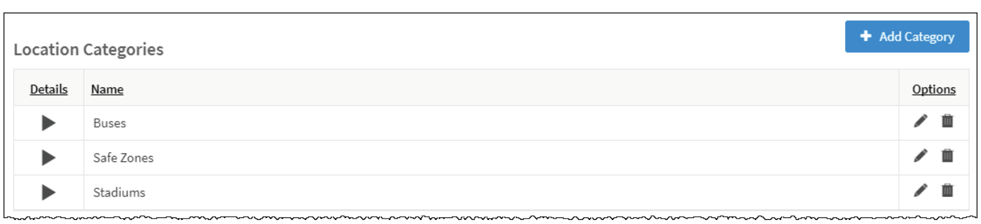
1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Emergency Mgmt** tab and select **Reunification** from the drop-down menu.
3. In the **Locations** area, click the icon for the item to be removed.
4. Click **OK** on the confirmation dialog to complete the process.

Manage Location Categories

The **Location Categories** area on the **Reunification Settings** workspace is used to manage the categories that can be used when defining the locations. From this area, users with the *Can Manage Reunification Settings* permission can view, create, modify and delete location categories.

View and Modify Location Categories

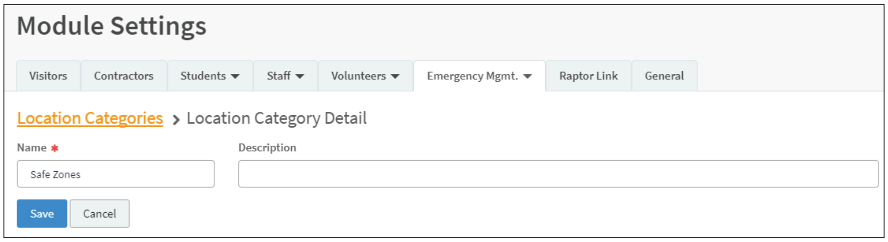
The **Location Categories** display in a grid on the **Reunification Settings** workspace.



Perform the following steps to view the details for a location category:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Emergency Mgmt** tab and select **Reunification** from the drop-down menu.

3. In the **Location Categories** area, click the icon in the **Details** column to view the information about the location category.



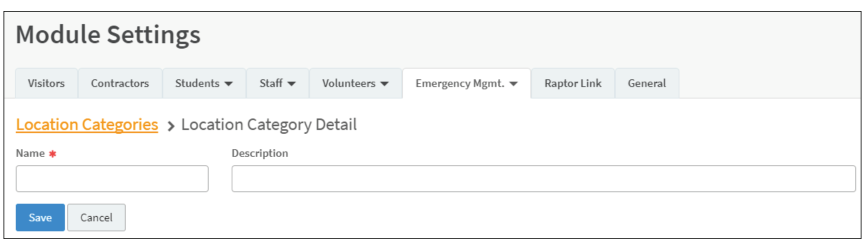
4. Modify any of the information and click **Save**.

You can also click the icon in the **Location Categories** grid to modify the name of the category, and then click to save it. Click to discard your changes.

Create Location Category

You can only create location categories at the all building level. Perform the following steps to create a location category:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Emergency Mgmt** tab and select **Reunification** from the drop-down menu.
3. In the **Locations** area, click **Add Location Category**.



4. Enter a **Name*** and **Description** (optional) for the location category and click **Save**.

Delete Location Category

Perform the following steps to delete a location category.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Emergency Mgmt** tab and select **Reunification** from the drop-down menu.
3. In the **Location Categories** area, click the icon for the item to be removed.

4. Click **OK** on the confirmation dialog to complete the process.

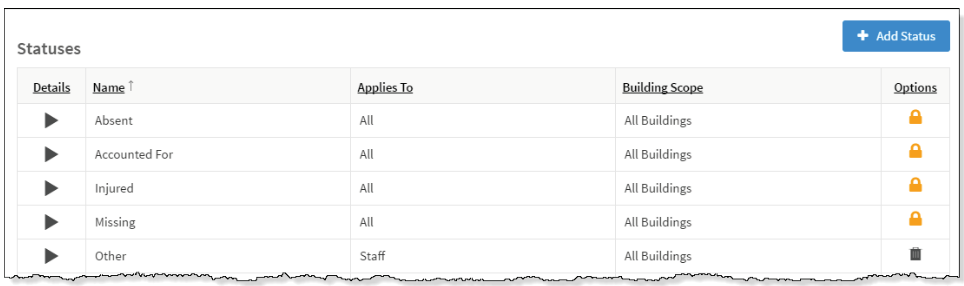
Manage Statuses

The **Statuses** area on the **Reunification Settings** workspace is used to manage the various statuses that can be assigned to individuals during a drill or emergency response. From this area, users with the *Can Manage Reunification Settings* permission can view, create, modify and delete statuses (specific to user-defined statuses).

View and Modify Statuses

The **Statuses** display in a grid on the **Reunification Settings** workspace. The status name, who it applies to and building scope display.

> **Note** The statuses that show the icon are Raptor defined and cannot be modified.



Statuses

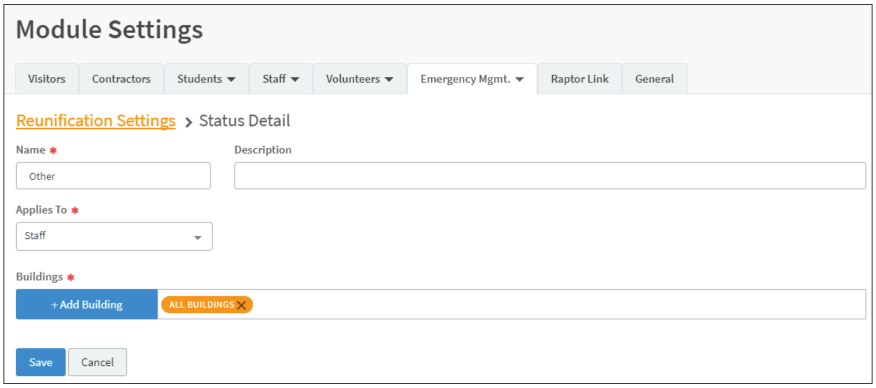
Add Status

Details	Name	Applies To	Building Scope	Options
	Absent	All	All Buildings	
	Accounted For	All	All Buildings	
	Injured	All	All Buildings	
	Missing	All	All Buildings	
	Other	Staff	All Buildings	

Perform the following steps to view the details for a status:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Emergency Mgmt** tab and select **Reunification** from the drop-down menu.
3. In the **Statuses** area, click the icon in the **Details** column to view the information about the location on the **Status Detail** workspace.

   > **Note** If the status is locked, the fields on the **Status Detail** workspace are *read-only* and cannot be changed.

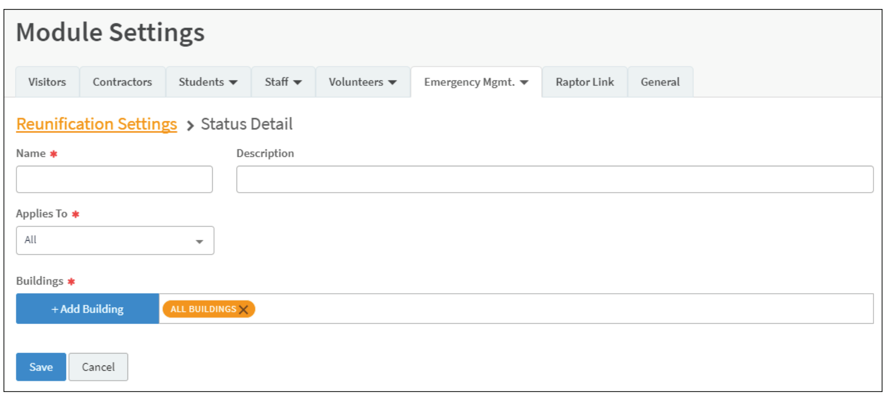


4. Modify any of the information and click **Save**.

Create Status

You can create a new status that is available for all buildings or specific buildings. Perform the following steps to create a new status:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Emergency Mgmt** tab and select **Reunification** from the drop-down menu.
3. In the **Statuses** area, click **Add Status**.



4. Enter the following information to define the status:
   - **Name*** – Enter the name for the status.
   - **Description** – Optionally, enter text that describes the status.

- **Applies To*** – Select who the status applies to during the reunification process (**All**, **Student**, or **Staff**) from the drop-down list.

> **Note** When the status is configured to apply to **All**, it can also be used for Visitors, Volunteers and Contractors; also known as *Others*.

- **Buildings*** – Click **Add Building** and select the building, a building group, or All Buildings from the drop-down list.

5. Click Save.

Delete Status

Perform the following steps to delete a status from the **Reunification Module Settings** workspace.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Emergency Mgmt** tab and select **Reunification** from the drop-down menu.
3. In the **Statuses** area, click the icon for the item to be removed.
4. Click **OK** on the confirmation dialog to complete the process.

Managing Raptor Link Module Settings (Admin)

Raptor Link provides the ability to integrate a Student Information System (SIS) with the Raptor System. This integration enables unattended synchronization of student, guardian, staff and roster data into the Raptor System. This data is then used by Raptor Reunification and the Raptor Student and Staff modules.

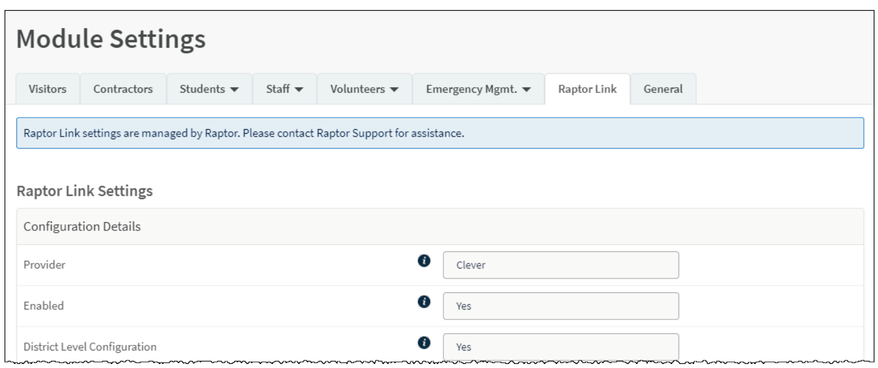
Use the **Raptor Link** tab on the **Module Settings** workspace to view the read-only Raptor Link settings, manage the Raptor Link error notifications, and view Raptor Link building status.

View Raptor Link Settings

The **Raptor Link Settings** area on the **Raptor Link** tab displays the configuration details for Raptor Link. These setting are managed by Raptor and are read-only.

Perform the following steps to view the Raptor Link configuration settings:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Raptor Link** tab.
3. In the **Raptor Link Settings** area, view the **Configuration Details**.



Notes

- These fields are read-only and are managed by Raptor.
- If the District Level Configuration is set to No, this field does not display when viewing at the building level.

The **District Level Configuration** setting determines if Raptor Link is integrated at the district level (all buildings use the same Raptor Link connection) or at the building level (each building has a discrete Raptor Link connection):

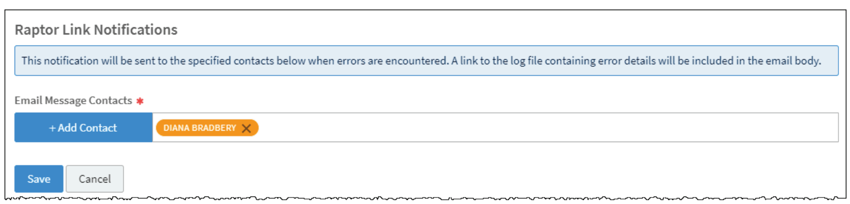
- If Raptor Link is integrated at the district level, the value is **Yes**.
- If Raptor Link is integrated at the building level, the value is **No**.

Manage Raptor Link Notifications

The **Raptor Link Notifications** area on the workspace only displays at the district level. Use this area to specify the contacts who will receive an email when Raptor Link has encountered an error.

> **Note** Contacts must be defined prior to using this feature.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Raptor Link** tab.
3. In the **Raptor Link Notifications** area, click **Add Contact** and select the contact name from the drop-down list. The contact information must be added prior to creating the email notification.



> **Notes**
> - In the **Add Contact** drop-down list, the icons that display represent the contact's preferred method of notification.
> - If the contact has selected both Text and Email as their preferred notification method, when one method is populated with the contact name, the other method will be automatically populated.

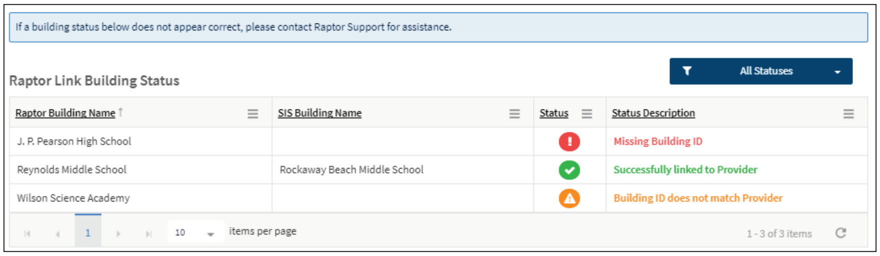
To remove an email contact, click the **X** in the contact label.

> **Note** If the contact name is gray, it was defined at the district level and cannot be removed at the building level.

4. Click **Save**.

View Raptor Link Building Status

The **Raptor Link Building Status** area on the **Raptor Link** tab displays the building status for all buildings in the district. This area on the workspace is only available at the district level.



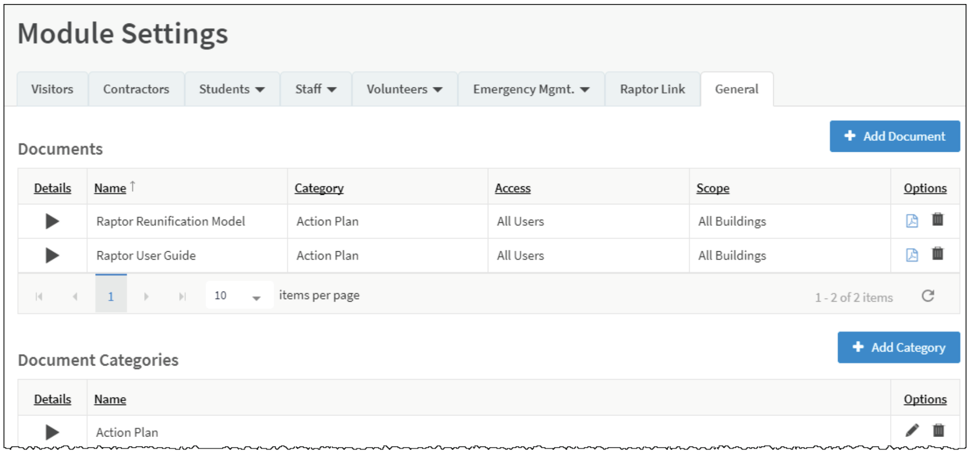
Click the filter button to filter the information you want to display.

An icon displays in the **Status** column to indicate the Raptor Link status for the building and a description displays in the **Status Description** column:

- – Indicates that the Raptor building is successfully linked to an SIS or SIS proxy building and is correctly functioning.
- – Indicates that a value appears in the Building ID field of the building but the building is not linked to an SIS or SIS proxy building.
- – Indicates that there is no value in the Building ID field.

Managing General Module Settings (Admin)

Use the **General** tab on the **Module Settings** workspace to manage cross-module settings that are used throughout the product but are not specific to a module.



Manage Documents REU

If the Reunification module is enabled and depending on your permissions, you can view and manage documents related to the reunification process from the **Documents** area on the **General Module Settings** workspace.

- Users with the *Can Manage Documents* permission, can view, add, modify, and delete documents on the workspace.
- Users without the *Can Manage Documents* permission can only view the document (PDF) and document metadata.

View Documents

Perform the following steps to view the documents that have been uploaded to the Raptor system for the reunification processes.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **General** tab.
3. In the **Documents** area, view the documents in the grid. The name of the document, type, who can access it and the building scope display.
4. Click the icon in the **Options** column to preview the document in PDF format.

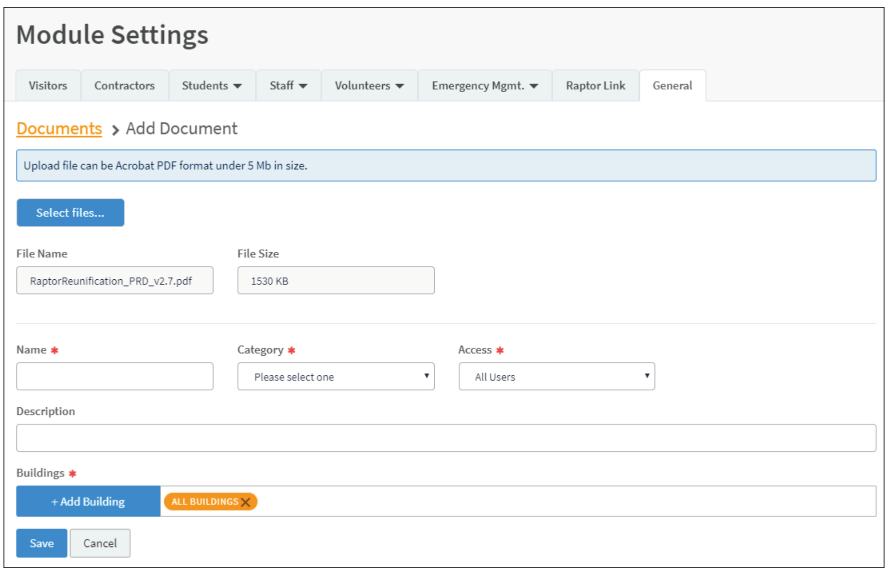
> **Note** You must have Adobe Acrobat installed to view the PDF.

Add Document

Users with the *Can Manage Documents* permission can add documents to the Documents grid on the **General** workspace.

> **Note** The document must be in Adobe Acrobat PDF format and less than 5 MB in size.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **General** tab.
3. In the **Documents** area, click **Add Document**.
4. On the **Add Document** workspace, click **Select File** and navigate to the location where the file is saved on your computer.



5. In the lower portion of the workspace, complete the following information:
   - **Name*** – Enter a name for the document.
   - **Category*** – Select the document category from the drop-down list (**Action Plan**, **Emergency Plan**, or **Facility Map**).
   - **Access*** – Select who has access to the document from the drop-down list (**All Users**, **Student Supervisor**, or **Incident Commander**).
   - **Description** – Optionally, enter text that describes the document; for example, when it should be used.
   - **Buildings*** – Click **Add Building** and select the building or building group for the buildings where the document is available.

6. Click **Save**.

Modify Documents

Users with the *Can Manage Documents* permission can modify the documents that are uploaded to the **Documents** grid on the **General** workspace.

1. In the navigation menu, select **Admin > Module Settings** and then click the **General** tab.
2. In the **Documents** area, click the ▶ icon for the document you want to modify.
3. Modify any of the fields for the existing document or upload a new version of the document.

   You can view the date the document was originally uploaded (Created Date) and by whom (Created By), and the last time it was modified (Modified Date) and by whom (Modified By) in the lower portion of the screen. These fields are *read-only* and are generated by the system.
4. Click **Save**.

Delete Document

Users with the *Can Manage Documents* permission can delete documents from the **Documents** grid on the **General** workspace.

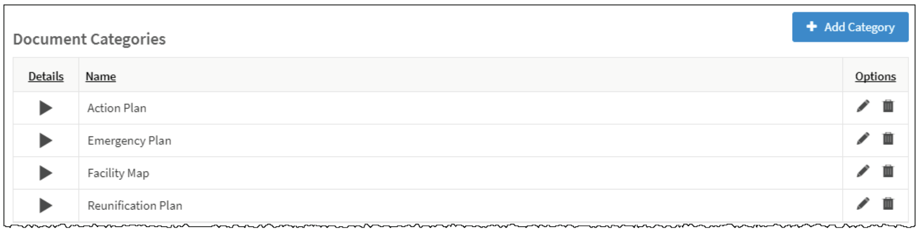
1. In the navigation menu, select **Admin > Module Settings** and then click the **General** tab.
2. In the **Documents** area, click the 🗑 icon for the document to be deleted.
3. On the confirmation dialog, click **OK**.

Manage Document Categories

The **Document Categories** area on the **General** workspace is used to manage the categories that can be used to organize documents. From this area, users with the *Can Manage Documents* permission can view, create, modify and delete document categories.

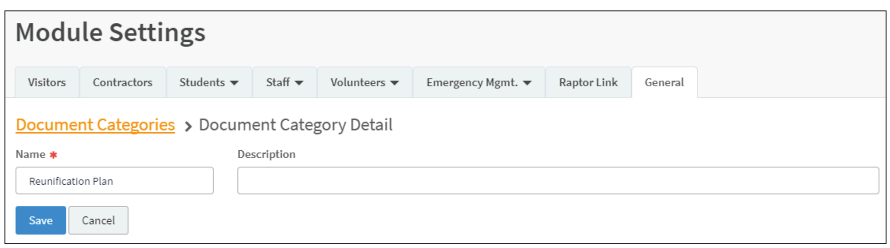
View and Modify Document Categories

The **Document Categories** display in a grid on the **General** workspace.



Perform the following steps to view the details for a location category:

1. In the navigation menu, select **Admin > Module Settings** and then click the **General** tab.
2. In the **Document Categories** area, click the icon in the **Details** column to view the information about the document category.



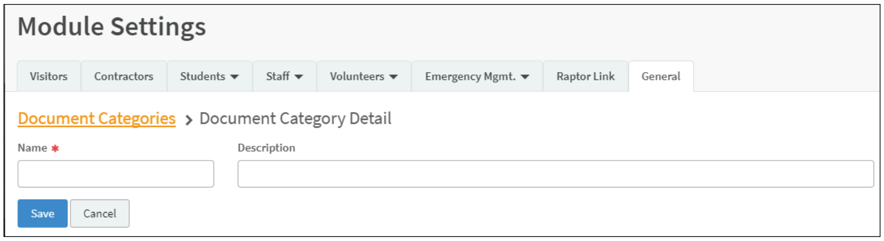
3. Modify any of the information and click **Save**.

You can also click the icon in the **Document Categories** grid to modify the name of the category, and then click to save it. Click to discard your changes.

Create Document Category

You can only create document categories at the all building level. Perform the following steps to create a document category:

1. In the navigation menu, select **Admin > Module Settings** and then click the **General** tab.
2. In the **Document Categories** area, click **Add Category**.



3. Enter a **Name*** and **Description** (optional) for the category and click **Save**.

Delete Document Category

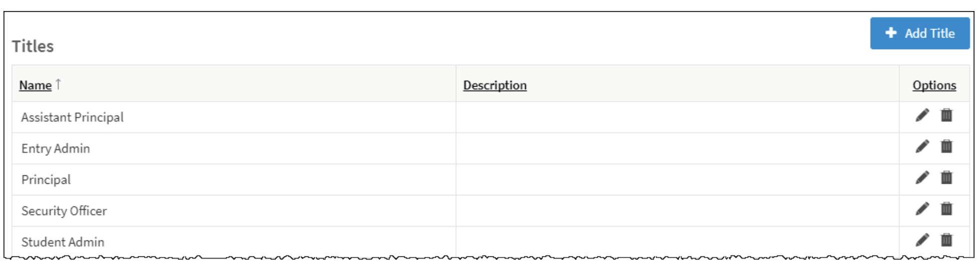
Perform the following steps to delete a document category.

1. In the navigation menu, select **Admin > Module Settings** and then click the **General** tab.
2. In the **Document Categories** area, click the 🗑 icon for the item to be removed.
3. Click **OK** on the confirmation dialog to complete the process.

Manage Titles

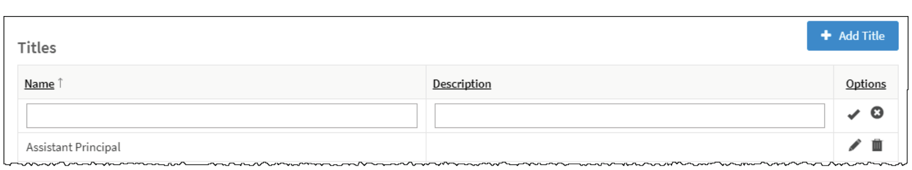
Users with Administrative permissions can view, create, modify and delete Titles. These titles are used in the **Users and Contacts** features.

> **Note** Titles are available for use across all buildings, whether they are created at the building level or the client level.



Add Title

1. In the navigation menu, select **Admin > Module Settings** and click the **General** tab.
2. In the **Titles** area, click **Add Title**.



3. Enter the **Name** and **Description** and then click the icon to save the new title. If you want to discard your changes, click the icon.

Modify Title

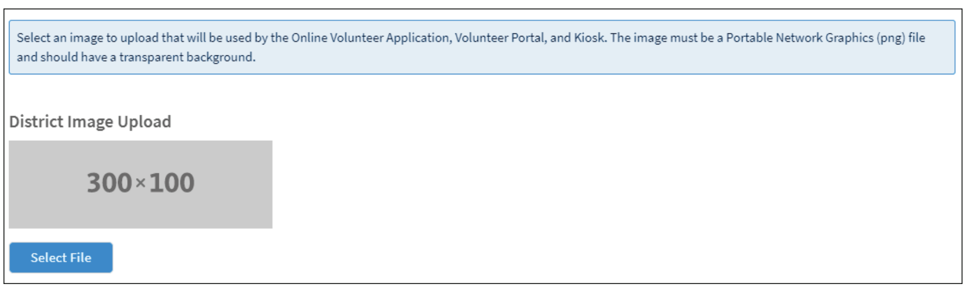
1. In the navigation menu, select **Admin > Module Settings** and click the **General** tab.
2. In the **Titles** area, click the icon for the title to modify.
3. Modify the name or description, and then click the icon to save the changes. If you want to discard your changes, click the icon.

Delete Title

1. In the navigation menu, select **Admin > Module Settings** and click the **General** tab.
2. In the **Titles** area, click the icon to delete a title.
3. On the confirmation dialog, click **OK**.

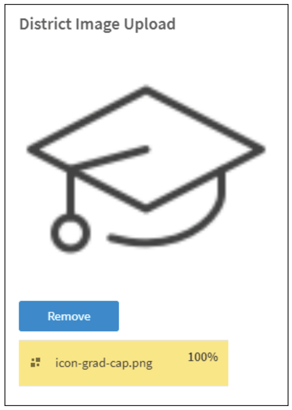
Upload District Image

Use this area on the **General** workspace to upload your district's logo image to be displayed on the Volunteer Portal, Online Volunteer Application and Kiosk.



1. In the navigation menu, select **Admin > Module Settings** and click the **General** tab.
2. In the **District Image Upload** area, click **Select File**.
3. Navigate to the file on your computer, select it and click **Open**.

   The image is uploaded and displays in the area.



If you want to delete a district logo that has been uploaded, click **Remove**, and then click **Continue** on the confirmation dialog.

Managing Alerts (Admin)

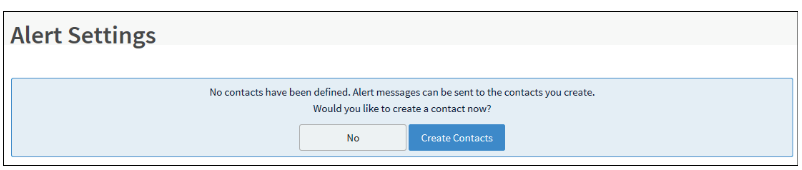
Alerts are used to flag specific individuals during the sign-in process or the student sign-out by guardian process, and to notify relevant response personnel. Use the **Alert Settings** workspace to manage alerts and notifications for the following types of alerts:

- **Sex Offender** – Manage sex offender alerts and notifications.
- **Custom** – Manage custom alerts used to notify relevant personnel that a potentially unwanted person is signing in to a building.
- **Emergency Buttons** – Manage the emergency button that displays in the upper right corner of the screen to send a silent emergency message to relevant personnel.
- **Instant** – Manage the instant alerts used to broadcast a message to all users that are logged into the Raptor System.
- **Incident** – Manage notifications that are used during the reunification process.

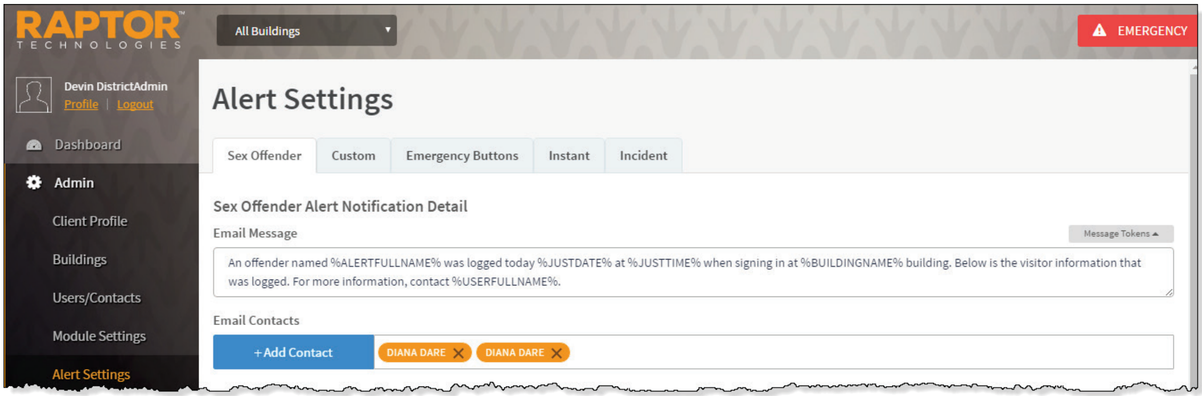
Prior to configuring alert notifications, you must create the contacts who will receive the notifications (email or text message).

> **IMPORTANT**
>
> If contacts are not defined and associated to the alerts, then no one will be notified of the alert (other than the user signing in the person).

When you open the **Alert Settings** workspace, if there are no contacts defined, the following message displays.



If you would like to create contacts now, click **Create Contacts**. Otherwise, click **No** and the **Alert Settings** workspace displays.



Notifications can be created at the All Buildings level or for a specific building. If you define a notification message and contacts for any of the alert types at the All Buildings level, these contacts will receive the notification message when the alert is triggered in any building.

At the specific building level, the notification created at the All Buildings level can be used or a different notification message can be entered and contacts specific to the building can be entered.

Notifications created at the building level do not affect the content or recipients of the notification at the All Buildings level.

Manage Sex Offender Alerts

Each time a visitor, contractor or volunteer signs in or a guardian signs out a student, their name and date of birth are compared against over 750,000 known sex offenders across all 50 states and several territories within the United States. Raptor takes the extra step of comparing all known alias names used by the sex offenders to the name of the person signing in, providing a thorough screening process.

When one or more matches are detected, a Possible Offender Alert displays on the screen for each occurrence. It is important to note that it is the responsibility of the user to determine if this Possible Offender Alert is an actual match. Therefore, the photos, middle name, sex, race, height, weight, and color of eyes should be compared to confirm an accurate match.

If a match is confirmed, a silent alert is immediately sent via email and/or text message to a customized receipt list. For positive matches, users are instructed to follow the proper procedures set up by your school or district.

> **Note** Raptor matches possible offenders based on name and any alias names in criminal records. Therefore, visitors, contractors and volunteers who have common names may get flagged multiple times.

Specify Sex Offender Alert Notifications

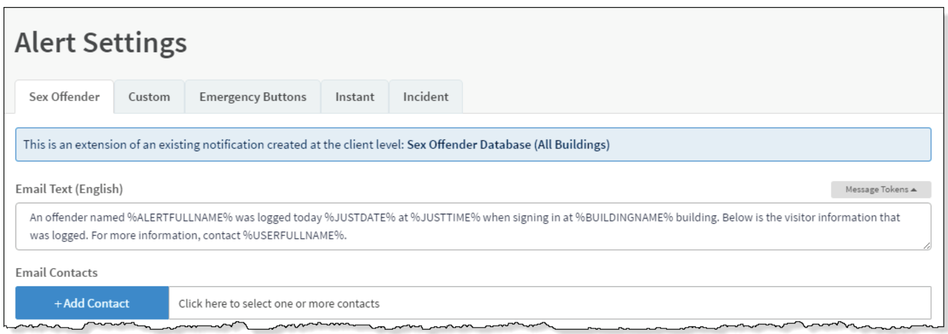
You can specify the notification message for sex offender alerts and who to send it to from the **Sex Offender Alert Notification Detail** workspace.

Perform the following steps to set up the sex offender alert notifications:

1. In the navigation menu, select **Admin > Alert Settings**.
2. On the **Sex Offender** tab, specify the following information and then click **Save**.

> **Note** Contacts must be defined prior to setting up notifications.

Email Notifications



- **Email Text** – The email message is pre-populated with a default message using message tokens, but you can change this message if desired. This text is sent in addition to the Visitor/Offender information so if this email message field is left blank, the Visitor/Offender information is still sent.

  To use message tokens to compile the message, see Message Tokens for Sex Offender Alert Notifications.

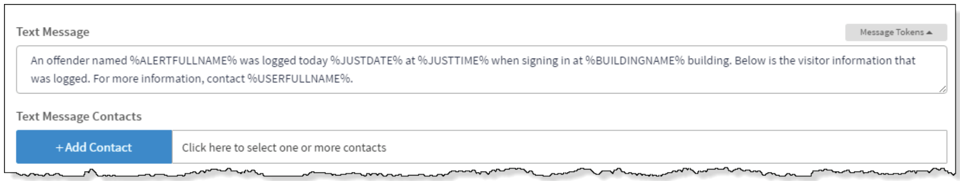
- **Email Contacts** – Click **Add Contact** and select the contact name from the drop-down list. The contact information must be added prior to creating the email notification.

  > **Note** In the **Add Contact** drop-down list, the icons that display represent the contact's preferred method of notification.

  To remove an email contact, click the **X** in the contact label.

  > **Note** If the contact name is gray, it was defined at the district level and cannot be removed at the building level.

Text Message Notifications



- **Text Message** – The optional text message is pre-populated with a default message using message tokens, but you can change this message if desired. If this field is left blank, no text message is sent.

  To use message tokens to compile the message, see Message Tokens for Sex Offender Alert Notifications.
- **Text Message Contacts** – For those who want to be notified via a text message, click **Add Contact** and select the contact name from the drop-down list. The contact information must be added in prior to creating the text message notification. Only those contacts that provided a text message phone can be selected from the list.

  > **Note** In the **Add Contact** drop-down list, the icons that display represent the contact's preferred method of notification.

  To remove a text contact, click the **X** in the contact label.

  > **Note** If the contact name is gray, it was defined at the district level and cannot be removed at the building level.

District Policy Message

Users with the *Can Manage Alerts* permission can specify the district policy and procedures to be followed when a visitor, contractor, guardian or volunteer matches a sex offender during sign in. This message can be accessed on the Match Confirmation alert notification.

1. In the **District Policy Message** area on the **Sex Offender Alert Notification Detail** workspace, enter the message that you want displayed when **Match** is selected on the **Possible Sex Offender** dialog.
2. Click **Save**.

Message Tokens for Sex Offender Alert Notifications

You can also use **Message Tokens**, which are variables, in the notification message so that when the message is sent, the tokens will be replaced by their associated value.

Click **Message Tokens** to view the variables that can be used in the message.

%CLIENTNAME% - District Name
%BUILDINGNAME% - Building Name
%USERFULLNAME% - User's First and Last Name
%ALERTFULLNAME% - Visitor's First and Last Name
%JUSTTIME% - Time Logged - hh:mm: tt
%JUSTDATE% - Date Logged - MM/DD/YYYY

Example:

An alert has been issued by %USERFULLNAME% at %CLIENTNAME% %BUILDINGNAME% on %JUSTDATE% at %JUSTTIME%.

Manage Custom Alerts

Custom alerts, previously known as private alerts, are customized alerts to meet the specific needs of your school and/or district. Custom alerts are used to notify relevant personnel that a potentially unwanted person is signing in to a building. They are commonly used for:

- Custody issues
- Restraining orders
- Banned visitors

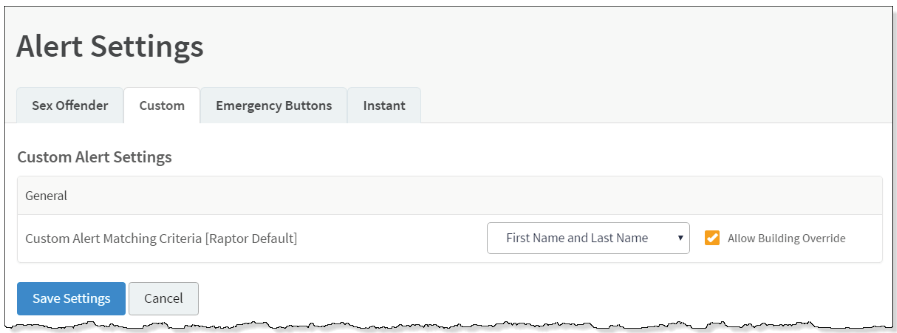
Custom alerts are similar to offender alerts except that the matching criteria, such as Last Name, First Name and Last Name, or First Name, Last Name and Date of Birth is defined by your school and/or district. When a visitor or contractor is signed in, Raptor compares that person's first name and last name (depending on the selected matching criteria) to each of the custom alerts defined.

During the sign in process, if one or more matches are detected, a Possible Custom Alert displays on the screen. The user must carefully compare the information displayed in the Possible Custom Alert to determine if it is an actual match. It is recommended that the details in the alert, such as the photo, middle name, and notes be reviewed to confirm an accurate match.

If a match is confirmed, a silent alert is immediately sent via email, text message, and/or voice message to a customized recipient list. For positive matches, users are instructed to follow the proper procedures set up by your school or district.

Specify Custom Alert Matching Criteria

When creating custom alerts, Administrators with the *Can Manage Alerts* permission can set the criteria that must be matched before a possible custom alert is generated. They can also specify whether this setting can be overridden at the building level.



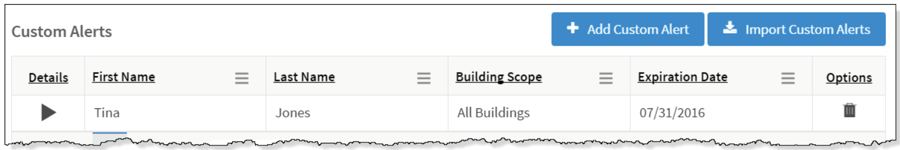
Perform the following steps to specify the matching criteria for custom alerts:

1. In the navigation menu, select **Admin > Alert Settings**.
2. Click the **Custom** tab.
3. In the **General** area under **Custom Alert Settings**, select the criteria that must be matched from the **Custom Alert Matching Criteria** drop-down list. Matching criteria can be based on the following:
   - Last Name
   - First Name and Last Name
   - First Name, Last Name, and Date of Birth
4. If you are at the client level (All Buildings), the **Allow Building Override** check box is visible. If you want to allow this setting to be changed at the building level, select the check box.
5. Click **Save Settings**.

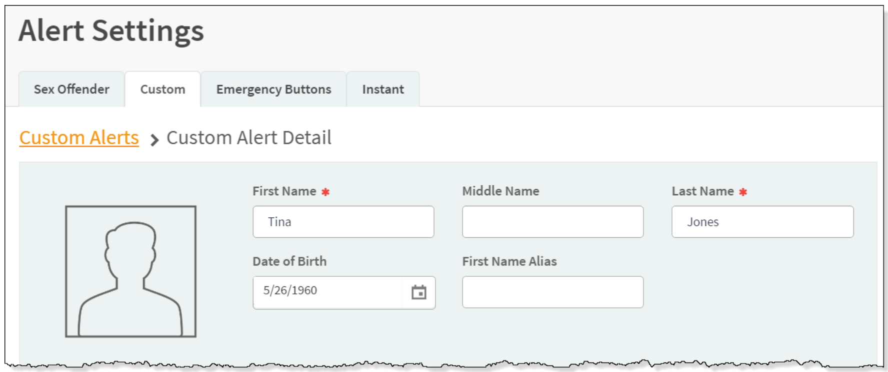
Add Custom Alert

Perform the following steps to create a custom alert.

1. In the navigation menu, select **Admin > Alert Settings**.
2. Click the **Custom** tab.
3. In the **Custom Alerts** area, click **Add Custom Alert**.



4. On the **Custom Alert Detail** workspace, use one of the following methods to specify the information about the person for whom you are creating a custom alert:



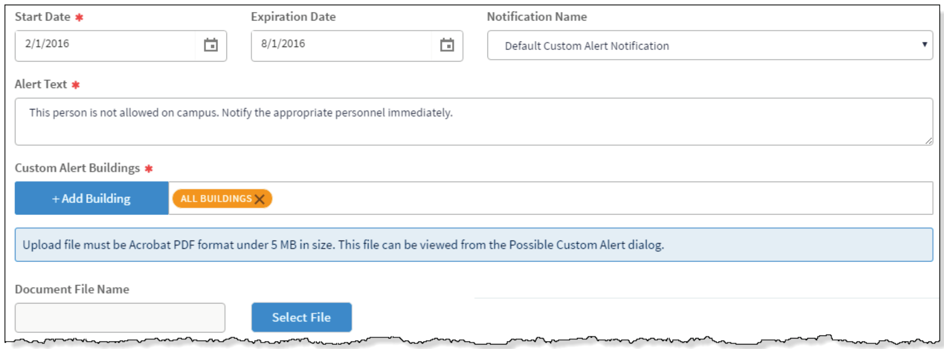
- **Find** – If the person has previously signed in to the building, enter their name (or a portion of their name) in the text box and click **Find**.

  If more than one record is returned, click the **Select** icon to display their information in a Detail view.
- **Manual Entry** – If the person has not previously signed in to the building, manually enter the person's information in the following fields:

  > **Note** Required fields are determined by the **Custom Alert Matching Criteria** setting in Specify Custom Alert Matching Criteria and indicated with an asterisk *.

  - **First Name** – Enter the first name of the person in the alert.
  - **Middle Name** – Enter the middle name of the person in the alert.
  - **Last Name** – Enter the last name of the person in the alert.
  - **Date of Birth** – Select the date of birth from the calendar.
  - **First Name Alias** – If the person in the alert is known by another first name, enter it in this field.

5. Enter the alert information:



- **Start Date** – Select the date from the calendar to indicate the date the alert should become active.
- **Expiration Date** – Select the date from the calendar to indicate the date the alert should become inactive. If left blank, the alert will not be expired until you enter an expiration date or delete the alert.
- **Notification Name** – Select the notification that contains the default notification message and who to notify.

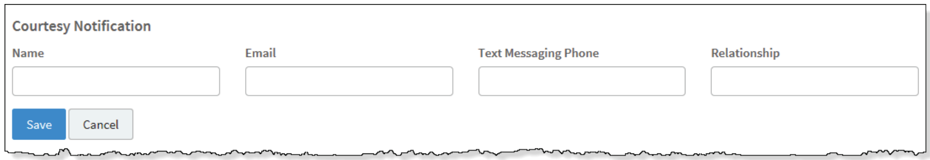
> **Note** If you want notifications to be sent when the alert is issued, you must complete the information in the Custom Alert Notification prior to adding the custom alert.

- **Alert Text** – Enter the information that displays in the **Notes** field on the Possible Custom Alert. This is the information that is visible to the Entry Admin when signing in the person.
- **Custom Alert Buildings** – Click **Add Building** and select the buildings where the alert is active.

6. If you want to upload and associate a document with the custom alert so that document is available to the Front Desk operator when there is a positive match, click **Select File**, navigate to the PDF document, and click **Open**. The file is uploaded, and the document name displays in the **Document File Name** field.

   If the document is no longer relevant and you want to remove it, click **Delete File** (the **Delete File** button only displays if there is a document uploaded).

7. In the **Courtesy Notification** area, enter the following information for external notification when the alert is triggered:



- **Name** – First and last name of the person to be notified.
- **Email** – If preferred method of contact is email, enter their email address.
- **Text Messaging Phone** – If preferred method of contact is text message, enter their mobile phone number.
- **Relationship** – Enter their relationship.

8. Click **Save**.

A confirmation message displays in the lower right corner of the screen indicating the alert was successfully added.

Import Custom Alerts

Administrators with the *Can Manage Alerts* permission can also import custom alerts, which provides the flexibility to configure multiple custom alerts in one process. The import utility also includes the ability for unattended import of custom alerts by creating a manifest file that includes information about the field mapping and file to be imported.

> **Note** To use this feature, you must first create an Excel spreadsheet or comma delimited file that contains the required information.

The file can contain the following custom alert information to be imported:

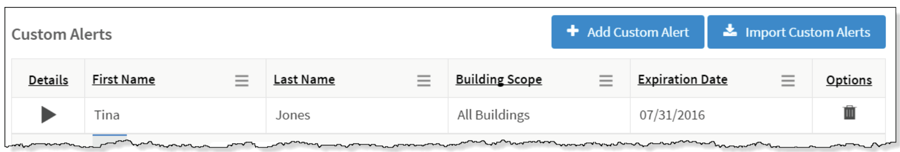
- First Name*
- Middle Name
- Last Name*
- Date of Birth
- First Name Alias
- Start Date
- Expiration Date
- Alert Text*
- Building Name (If you are importing at the All Buildings level.)
- Courtesy Notification – Name

- Courtesy Notification – Email
- Courtesy Notification – Text Messaging Phone
- Courtesy Notification – Relationship

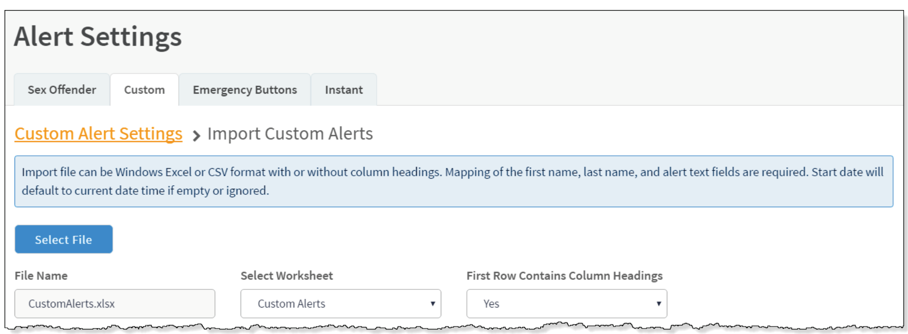
*Indicates required information.

Perform the following steps to import custom alerts.

1. In the navigation menu, select **Admin > Alert Settings**.
2. Click the **Custom** tab.
3. In the **Custom Alerts** area, click **Import Custom Alerts**.



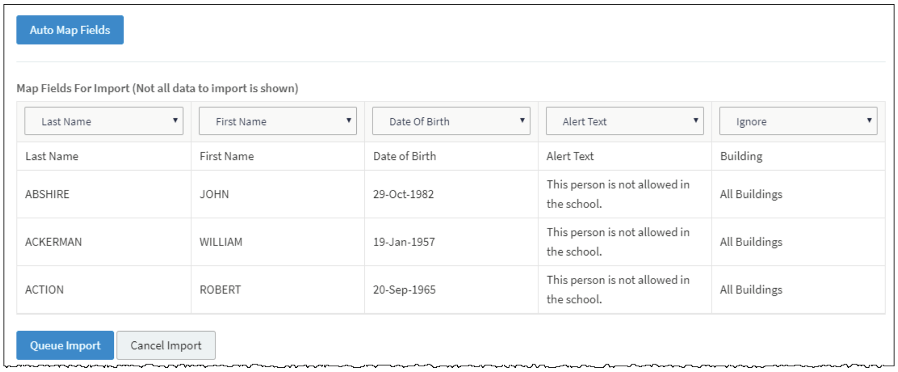
4. On the **Import Custom Alerts** workspace, click **Select File** and navigate to the location where the file is saved on your computer.



5. Select the **Excel** or **CSV** file and click **Open**.
6. If you used Excel and the file contains multiple worksheets, select the worksheet that contains the custom alert information from the **Select Worksheet** drop-down list.
7. If the first row of the worksheet contains column headings, select **Yes** from the **First Row Contains Column Headings** drop-down list. Otherwise, select **No**.
8. Click **Auto Map Fields** to automatically map the column headings in the file to the mapping names in Raptor. The names must be identical.

   You can also manually map each of the columns to be imported by selecting the appropriate fields in the drop-down menu above each column that displays.

> **Note** First Name, Last Name, and Alert Text are required columns. The columns with **Ignore** selected with not be imported.



9. If you want to create a manifest file to schedule automatic imports, click **Save Manifest** and save the file. You can then schedule the imports using a scheduling utility. See Using Manifest Import.
10. Click **Queue Import**.

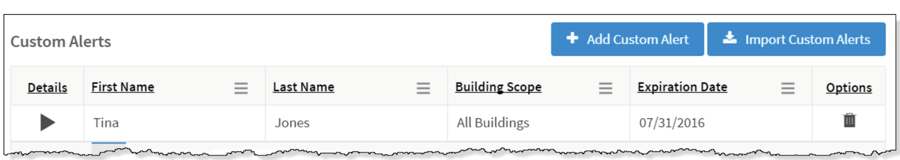
    A message displays in the lower right corner of the screen stating that the import job was successfully added to the import queue for processing.

    When the import has completed processing, an email will be sent to the email address of the user indicating the number of records successfully imported and any error that may have occurred.

View All Custom Alerts

You can view all the custom alerts that have been set up for a specific building or all buildings from the **Alert Settings > Custom** tab.

1. In the navigation menu, select **Admin > Alert Settings**.
2. Click the **Custom** tab.
3. View the alerts under **Custom Alerts**.



4. Click the ▶ icon to expand the **Custom Alert Detail**.

Edit Custom Alert

> **Note** If a custom alert has the icon in the **Options** column, it was created at a district level and can only be modified when the Building Selector is set to All Buildings.

Perform the following steps to modify a custom alert:

1. In the navigation menu, select **Admin > Alert Settings**.
2. Click the **Custom** tab.
3. In the **Custom Alerts** area, click the ▶ icon to expand the **Custom Alert Detail**.
4. Modify any of the fields and then click **Save**.

> **Note** If you want to disable an alert but not delete it, change the **Expiration Date** to the current date or prior date.

Delete Custom Alert

> **Note** If a custom alert has the icon in the Options column, it was created at a district level and can only be deleted when the Building Selector is set to All Buildings.

Perform the following steps to delete a custom alert:

1. In the navigation menu, select **Admin > Alert Settings**.
2. Click the **Custom** tab.
3. In the **Custom Alerts** area, locate the alert in the list that displays and click the icon in the **Options** column. The alert is deleted and will no longer be referenced during sign in.

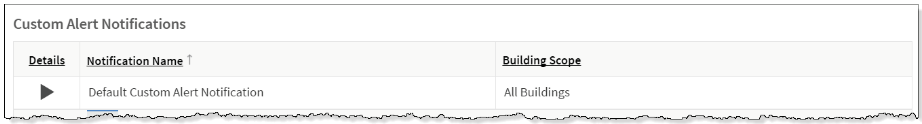
Specify Custom Alert Notifications

You can specify recipients of a custom alert notification and the message that is sent in the notification. This information can then be referenced in the alert detail so that the notification is sent when the custom alert is issue.

> **Note** Contacts must be defined prior to setting up notifications.

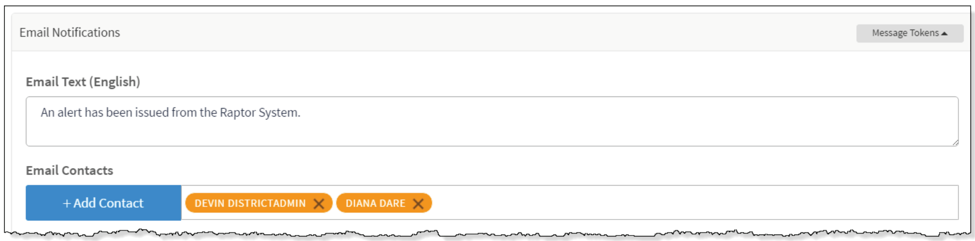
Perform the following steps to set up the custom alert notifications:

1. In the navigation menu, select **Admin > Alert Settings**.
2. Click the **Custom** tab and navigate to the **Custom Alert Notifications** area.



3. Click the ▶ icon to expand the **Notification Detail**.
4. Specify the following information and then click **Save**.

Email Notifications



- **Email Text** – The email message is pre-populated with a default message using message tokens, but you can change this message if desired.

  To use message tokens to compile the message, see Message Tokens for Custom Alert Notifications.

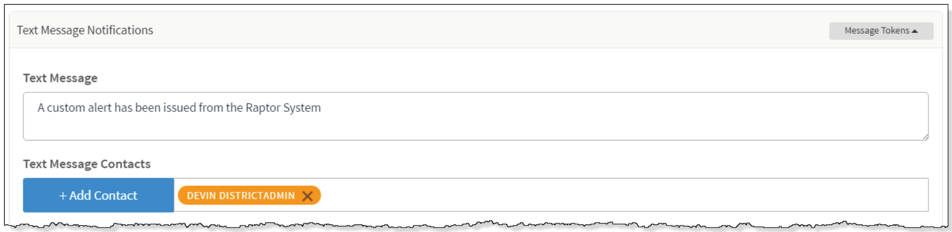
- **Email Contacts** – Click **Add Contact** and select the contact name from the drop-down list. The contact information must be added prior to creating the email notification.

  > **Notes**
  >
  > - In the **Add Contact** drop-down list, the icons that display represent the contact's preferred method of notification.
  > - If the contact has selected both Text and Email as their preferred notification method, when one method is populated with the contact name, the other method will be automatically populated.

  To remove an email contact, click the **X** in the contact label.

  > **Note** If the contact name is gray, it was defined at the district level and cannot be removed at the building level.

Text Message Notifications



- **Text Message** – The text message is pre-populated with a default message using message tokens, but you can change this message if desired.

  To use message tokens to compile the message, see Message Tokens for Custom Alert Notifications.
- **Text Message Contacts** – Click **Add Contact** and select the contact name from the drop-down list. The contact information must be added prior to creating the text message notification. Only those contacts that provided a text message phone can be selected.

  > **Note** In the **Add Contact** drop-down list, the icons that display represent the contact's preferred method of notification.

  To remove a text contact, click the **X** in the contact label.

  > **Note** If the contact name is gray, it was defined at the district level and cannot be removed at the building level.

Message Tokens for Custom Alert Notifications

You can also use **Message Tokens**, which are variables, in the notification message so that when the message is sent, the tokens will be replaced by their associated value.

Click **Message Tokens** to view the variables that can be used in the message.

%CLIENTNAME% - District Name
%BUILDINGNAME% - Building Name
%USERFULLNAME% - User's First and Last Name
%CUSTOMALERTTEXT% - First 90 characters of the Custom Alert text
%ALERTFULLNAME% - Visitor's First and Last Name
%JUSTTIME% - Time Logged - hh:mm: tt
%JUSTDATE% - Date Logged - MM/DD/YYYY

Example: An alert has been issued by %USERFULLNAME% at %CLIENTNAME% %BUILDINGNAME% on %JUSTDATE% at %JUSTTIME%.

Manage Emergency Buttons

The Emergency button displays in the upper right corner of the screen if Emergency Alerts are enabled for your school or for all schools in the district. In case of an emergency (for any reason), you can click the Emergency button to send a silent emergency message via email, text message, or voice message to a customized recipient list.

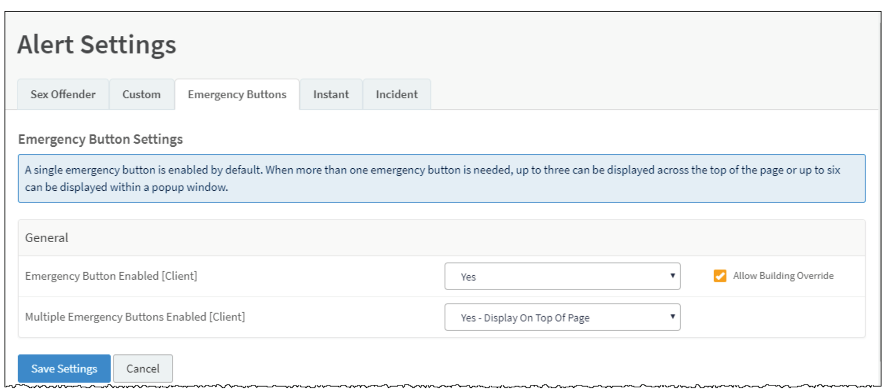
Enable/Disable Emergency Alert Button(s)

When enabled, the Emergency button is always displayed on the screen. In an emergency at your campus, clicking this button will dispatch a text message or email to staff members at your school silently notifying them that there is an emergency that requires action.

You can also enable multiple emergency buttons to quickly notify the appropriate contacts about specific emergencies. When enabled, up to three buttons can be displayed across the top of the page, or up to six buttons can be displayed within a popup window.

Perform the following procedure to enable or disable emergency buttons:

1. In the navigation menu, select **Admin > Alert Settings**.
2. Click the **Emergency Buttons** tab.



3. In the **Emergency Button Settings** area, specify the following information:
   - **Emergency Button Enabled** – Select **Yes** (to enable) or **No** (to disable).
   - **Multiple Emergency Buttons Enabled** – Select **Yes – Display On Top of Page** or **Yes – Display In Popup Window** (to enable), or **No** (to disable).

- Select or clear the **Allow Building Override** check box. If selected, this setting can be overridden at the building level.

4. Click **Save Settings**.

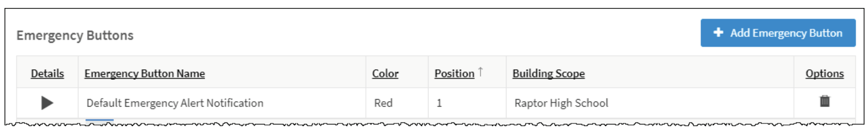
Specify Emergency Button Details

You can specify the emergency button name, message and the contacts who will receive a notification using the **Emergency Button Detail** workspace. The contacts specified in the notification will be notified whenever an emergency alert is issued.

> **Note** Contacts must be defined prior to setting up notifications.

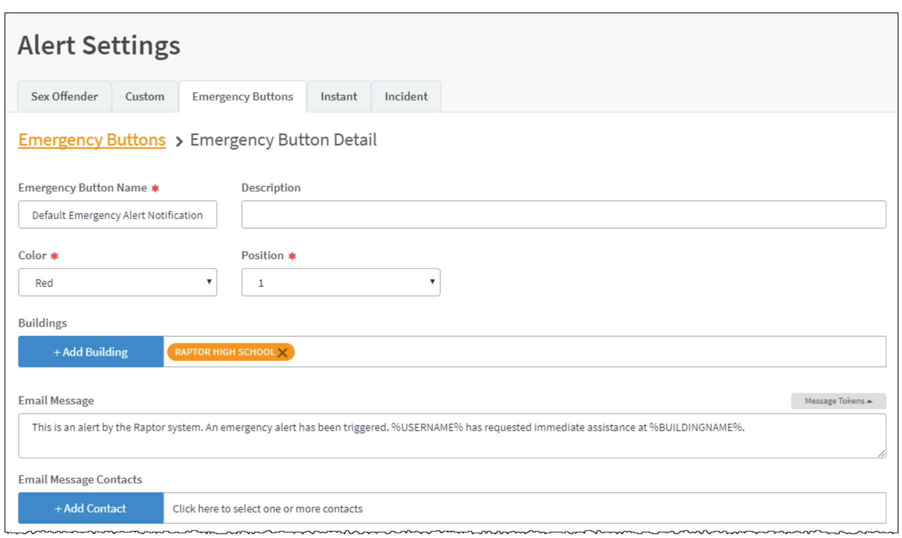
Perform the following steps to specify the emergency button details:

1. In the navigation menu, select **Admin > Alert Settings**.
2. Click the **Emergency Buttons** tab and navigate to the **Emergency Buttons** area.



3. If you want to modify the **Default Emergency Alert Notification**, click the ▶ icon to expand the **Emergency Button Detail**.

   If you want to create a new emergency button, click **Add Emergency Button**.



4. Specify the following information:
   - **Emergency Button Name*** – This name displays on the button at the top of the page or in a popup window. The name is limited to 20 characters.
   - **Description** – Optionally, enter a description for the button.
   - **Color** – Select the background color for the button.
   - **Position** – Select the position (order) of where the button displays in relevance to other buttons.
   - **Buildings** – Click **Add Building** and select the building where the emergency button will be implemented. When **All Buildings** is selected, the notification is enabled for all schools in the district. The **All Buildings** option is only available at the district level (the Building Selector is set to **All Buildings**).

     > **Note** If **All Buildings** is selected, and a user views this field for a specific school, only the school's name appears in the **Buildings** field.

   - **Email Message** – The email message is pre-populated with a default message using message tokens (see Message Tokens for Emergency Notifications). You can customize this message for the specific emergency button.
   - **Email Message Contacts** – Click **Add Contact** and select the contact name. To remove an email contact, click the **X** in the contact label.

     > **Note** If the contact name is gray, it was defined at the district level and cannot be removed at the building level.

   - **Text Message** – The text message is pre-populated with a default message using message tokens (see Message Tokens for Emergency Notifications). You can customize this message for the specific emergency button.
   - **Text Message Contacts** – Click **Add Contact** and select the contact name. To remove an email contact, click the **X** in the contact label.
   - **Voice Message** – The voice message is pre-populated with a default message using message tokens (see Message Tokens for Emergency Notifications). You can customize this message for the specific emergency button.
   - **Voice Message Contacts** – Click **Add Contact** and select the contact name. To remove an email contact, click the **X** in the contact label.

Notes

- In the **Add Contact** drop-down list, the icons that display represent the contact's preferred method of notification.
- If the contact has selected both Text and Email as their preferred notification method, when one method is populated with the contact name, the other method will be automatically populated.

5. Click **Save**.

Message Tokens for Emergency Notifications

You can also use **Message Tokens**, which are variables, in the notification message so that when the message is sent, the tokens will be replaced by their associated value.

Click **Message Tokens** to view the variables that can be used in the message.

%CLIENTNAME% - District Name
%BUILDINGNAME% - Building Name
%USERFULLNAME% - User's First and Last Name
%EMERGENCYBUTTONNAME% - Emergency Button Name
%JUSTTIME% - Time Logged - hh:mm: tt
%JUSTDATE% - Date Logged - MM/DD/YYYY

Example:

This is an alert by the Raptor system. An emergency alert has been triggered. %USERNAME% has requested immediate assistance at %BUILDINGNAME%.

Manage Instant Alerts

Instant alerts provide the ability for an administrator with the *Can Manage Alerts* permission to broadcast a message to all users that are logged into the Raptor System. This message is displayed in the lower portion on all workspaces in the product until the expiration date and time have elapsed, or the administrator disables the alert.

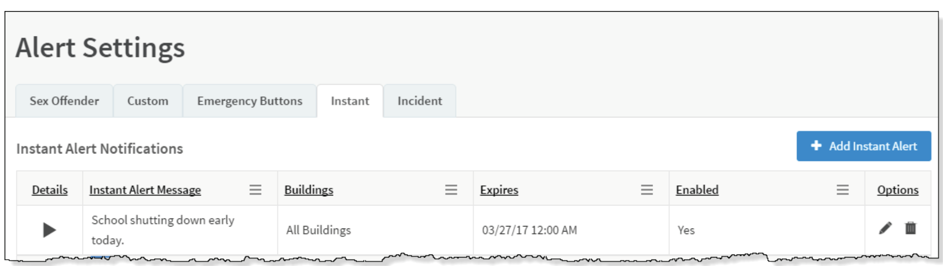
Typically, instant alerts are used to notify users of an early dismissal of students (for example, due to weather) or to immediately inform front desk employees of a special situation.

View Instant Alert Notifications

Perform the following steps to view all instant alerts:

1. In the navigation menu, select **Admin > Alert Settings** and click the **Instant** tab.
2. In the **Instant Alert Notifications** area, view the **Instant Alerts**.

   The alert message, the buildings where it is applicable, the expiration date and time, and whether the alert is enabled display in the data grid.

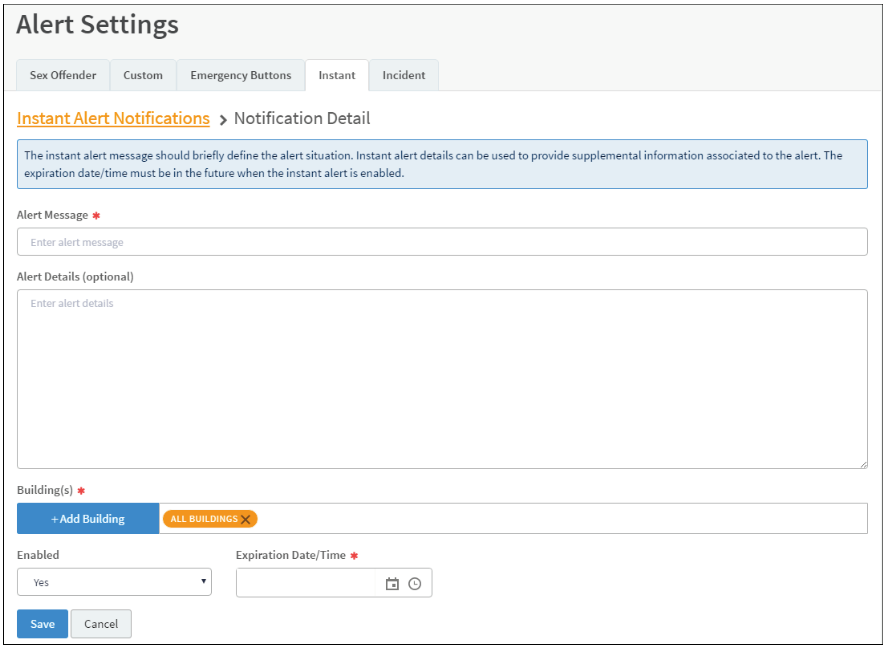


Add Instant Alert

Perform the following steps to create an instant alert.

1. In the navigation menu, select **Admin > Alert Settings** and click the **Instant** tab.
2. In the **Instant Alert Notifications** area, click **Add Instant Alert**.
3. On the **Notification Detail** workspace, enter the **Alert Message*** and optional **Alert Details**. The Alert Message field should contain a short message that displays in the instant alert at the bottom of the screen.

More details and supporting information can be entered in the Alert Details field.



4. In the **Buildings*** field, click **Add Building** and select the buildings where the alert is active.
5. In the **Enabled** field, select **Yes** or **No** to indicate whether the alert is enabled immediately after saving it.
6. In the **Expiration Date/Time*** field, click the icon and select the date and time when the instant alert will expire. The expiration/date must be in the future when the instant alert is enabled.
7. Click **Save**.

   A confirmation message displays in the lower right corner of the screen indicating the alert was successfully added.

Modify Instant Alert

Perform the following steps to modify the details of an instant alert.

1. In the navigation menu, select **Admin > Alert Settings** and click the **Instant** tab.
2. In the **Instant Alert Notifications** area, click ▶ icon for the alert to be modified.
3. On the **Notification Detail** workspace, modify the alert details and click **Save**.

Modify Expiration or Enable/Disable Instant Alert

You can also modify the Expiration Date/Time or Enable/Disable an instant alert from the **Instant Alert Notifications** data grid.

1. In the navigation menu, select **Admin > Alert Settings**.
2. Click the **Instant** tab.
3. In the **Instant Alert Notifications** area, click ✎ icon for the alert to be modified.
4. Modify the date and time in the **Expires** column, or select or clear the **Enabled** check box.
5. Click the ✔ icon to save your changes.

Delete Instant Alert

Perform the following steps to delete an instant alert.

1. In the navigation menu, select **Admin > Alert Settings**.
2. Click the **Instant** tab.
3. In the **Instant Alert Notifications** area, click 🗑 icon for the alert to be deleted.
4. On the confirmation dialog, click **OK** to confirm the delete.

Manage Incident Alerts REU

The **System Notifications** workspace is used manage system notifications for when incidents are initiated and closed, and when students have been released or reunified with an approved guardian. These notifications are managed from the **Incident** tab on the **Alert Settings** workspace.

Users with the *Can Manage Alerts* permission can manage the messages that are included in the system notifications and to whom they are sent, and manage custom notifications from this workspace.

Manage System Notifications

The system notifications are predefined notifications that ship with the Raptor Reunification system. The following notifications are available for All Buildings:

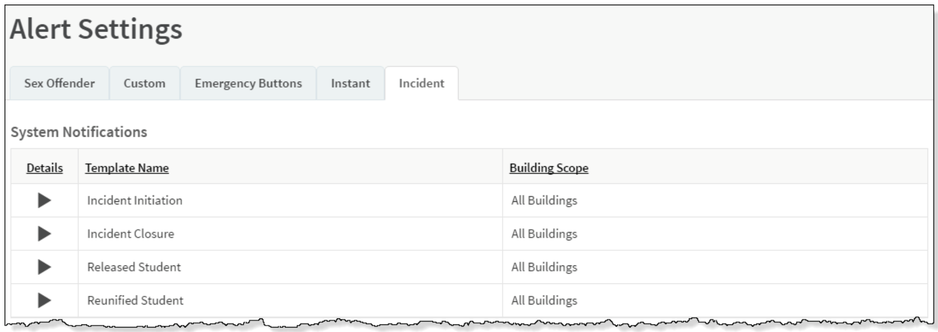
- **Incident Initiation** – This notification is sent when a drill or live emergency from the Reunification mobile app is triggered. It is sent to all users tied to the building where the incident has occurred.
- **Incident Closure** – This notification is sent when a drill or incident is completed and has been closed. It is sent to all users tied to the building where the incident has occurred.
- **Released Student** – This notification is sent when a student has been released during a drill or live emergency. The notification is sent to all configured guardians for the student.
- **Reunified Student** – This notification is sent when a student has been reunified with an approved guardian.

You can specify notification message and recipients for each of the system notifications.

> **Note** Contacts must be defined prior to setting up notifications.

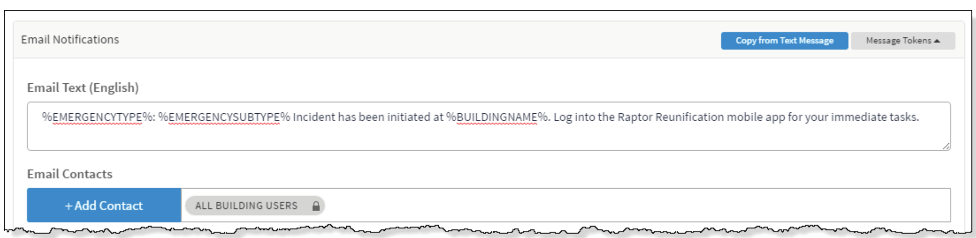
Perform the following steps to manage system notifications:

1. In the navigation menu, select **Admin > Alert Settings**, and then click the **Incident** tab.



2. Click the ▶ icon next to the notification (Template Name) to expand the **System Notification Detail**.
3. Specify the following information and then click **Save**.

Email Notifications



- **Email Text** – The email message is pre-populated with a default message using message tokens, but you can change this message if desired.

  If you want to use the same message as that used in the Text Message notification, click **Copy from Text Message**.

  To use message tokens to compile the message, see Message Tokens for Incident Notifications.
- **Email Contacts** – Click **Add Contact** and select the contact name from the drop-down list. The contact information must be added prior to creating the email notification.

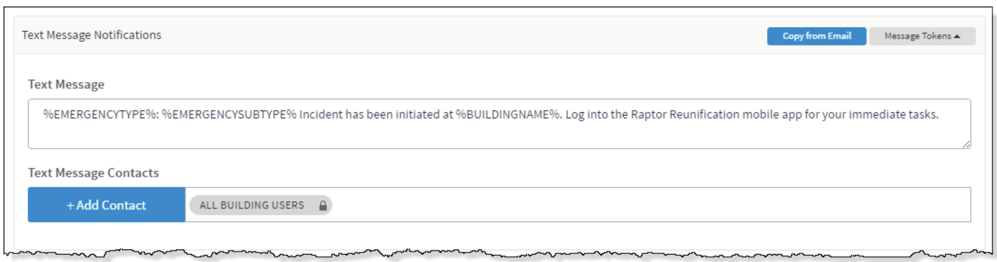
Notes

- In the **Add Contact** drop-down list, the icons that display represent the contact's preferred method of notification.
- If the contact has selected both Text and Email as their preferred notification method, when one method is populated with the contact name, the other method will be automatically populated.

To remove an email contact, click the **X** in the contact label.

Note If the contact name is gray, it was pre-defined by Raptor or by the district and cannot be removed.

Text Message Notifications



- **Text Message** – Enter the message that will be sent via text.

  If you want to use the same message as that used in the Email notification, click **Copy from Email**.

  To use message tokens to compile the message, see Message Tokens for Incident Notifications.
- **Text Message Contacts** – Click **Add Contact** and select the contact name from the drop-down list. The contact information must be added prior to creating the text message notification. Only those contacts that provided a text message phone can be selected.

Note In the **Add Contact** drop-down list, the icons that display represent the contact's preferred method of notification.

To remove a text contact, click the **X** in the contact label.

Note If the contact name is gray, it was pre-defined by Raptor and cannot be removed.

Message Tokens for Incident Notifications

You can also use **Message Tokens**, which are variables, in the notification message so that when the message is sent, the tokens will be replaced by their associated value.

Click **Message Tokens** to view the variables that can be used in the message.

%CLIENTNAME% - District Name
%BUILDINGNAME% - Building Name
%INCIDENTCATEGORY% - Identifies if the incident is a drill or an emergency
%USERFULLNAME% - User's First and Last Name who initiated the incident
%EMERGENCYTYPE% - Emergency type tied to the incident initiated for the school
%EMERGENCYSUBTYPE% - Emergency sub-type tied to the incident initiated for the school

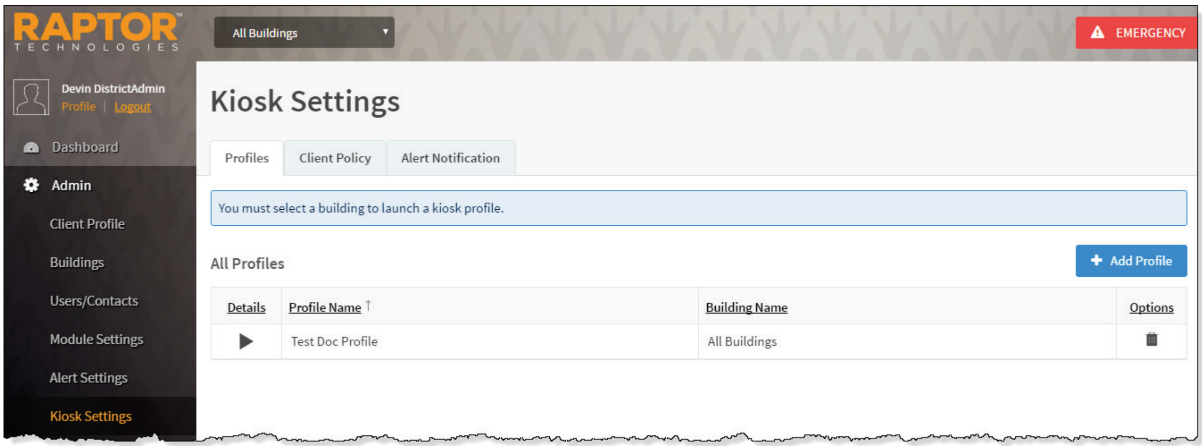
Example:

[%INCIDENTCATEGORY%] %EMERGENCYTYPE% - %EMERGENCYSUBTYPE% has been initiated at %BUILDINGNAME%. Log into the Raptor Reunification mobile app now for your immediate tasks.

Managing Kiosk Settings (Admin)

Users with the *Can Manage Kiosks* permission can manage what displays in the Kiosks at the building level or for all buildings (client level). You access this workspace by selecting **Admin > Kiosk Settings** in the navigation menu.

From this workspace, you can add profiles that determine what displays on the Kiosk, manage client policy for kiosks, and launch a Kiosk.



Manage Profiles

The **Profiles** tab is used to add a profile and launch the Kiosk. A specific building must be selected to be able to launch a Kiosk.

Add Profile

1. In the navigation menu, select **Kiosk Settings**.
2. On the **Profiles** tab, click **Add Profile**.

3. Enter a name in the **Profile Name** text box.

   The name assigned to a Kiosk Profile may indicate where the kiosk is located and/or what capabilities will be available (for example, Students

Only – South Entrance). This will make it easier for the person that launches the kiosk to know which profile to use.

4. In the **All Modules** area, select the check boxes for the features you want enabled. Clear the check boxes for the options you do not want enabled in the Kiosk.
   - **Enable 1D and 2D Barcode Support** – Select or clear the check box to enable or disable the use of 1D and 1D/2D barcode scanners in the kiosk. Currently, Raptor supports the CipherLab 1D Barcode Reader, Motorola 2D Barcode Reader and Symbol Technologies 1D/2D Barcode Reader.

     > **Notes**
     > - For student and staff to use the barcode reader, the Student ID or Staff ID field must be completed in their record (Student Detail or Staff Detail) and the ID number must be encoded in the 1D barcode.
     > - For visitors, contractors and volunteers to use the barcode reader, the Assigned ID field for each must contain the 1D barcode value.
     > - The 1D barcodes must be a minimum of 4 characters.

   - **Activate Secure Kiosk (Disables Keyboard Input Option for Visitors, Contractors, and Volunteers)** – Select or clear the check box to enable or disable the secure kiosk, which automatically requires visitors, contractors and volunteers to use either a 1D or 1D/2D barcode scanner when signing in or signing out of a building using the kiosk.

     > **Note** To activate secure kiosk, the **Enable 1D and 2D Barcode Support** setting must be selected (enabled).

5. For the **Visitors** module, select the check boxes for the options you want enabled. Clear the check boxes for options you do not want enabled in the Kiosk.
   - **Visitor Sign In** – Select or clear the check box to enable or disable visitor sign-in capabilities.
   - **Visitor Sign Out** – Select or clear the check box to enable or disable visitor sign-out capabilities.
   - **Enable Visitor Sign In Printing** – Select or clear the check box to enable or disable printing a badge during sign in.

6. For the **Contractors** module, select the check boxes for the options you want enabled. Clear the check boxes for options you do not want enabled in the Kiosk.
   - **Contractor Sign In** – Select or clear the check box to enable or disable contractor sign-in capabilities.
   - **Contractor Sign Out** – Select or clear the check box to enable or disable contractor sign-out capabilities.
   - **Enable Contractor Sign In Printing** – Select or clear the check box to enable or disable printing a badge during sign in.
7. For the **Students** module, select the check boxes for the options you want enabled. Clear the check boxes for options you do not want enabled in the Kiosk.
   - **Student Sign In** – Select or clear the check box to enable or disable student sign-in capabilities.
   - **Student Sign Out By Parent** – Select or clear the check box to enable or disable the ability for parents to sign out student.
   - **Student Self-Sign Out** – Select or clear the check box to enable or disable the ability for students to sign themselves out.
   - **Enable Student Sign In Printing** – Select or clear the check box to enable or disable printing a tardy pass during sign in.
   - **Enable Student Sign Out Printing** – Select or clear the check box to enable or disable printing an early dismissal pass during sign out.
   - **Mask Student ID Number** – Select or clear the check box to enable or disable hiding the student ID number on the screen.
8. For the **Staff** module, select the check boxes for the options you want enabled. Clear the check boxes for options you do not want enabled in the Kiosk.
   - **Staff Sign In** – Select or clear the check box to enable or disable staff sign-in capabilities.
   - **Staff Sign Out** – Select or clear the check box to enable or disable staff sign-out capabilities.
   - **Enable Staff Sign In Printing** – Select or clear the check box to enable or disable printing a badge during sign in.
   - **Mask Staff ID Number** – Select or clear the check box to enable or disable hiding the staff ID number on the screen.
   - **Confirm Staff Member Identity** – Select or clear the check box to enable or disable displaying the Confirmation dialog during staff sign in and sign out using the 1D barcode reader.

- ♦ When selected (enabled), the confirmation dialog displays the staff members name and they continue the sign-in process.

  If signing in using the 1D barcode from the Welcome page, and the staff member has additional personas (for example, visitor and volunteer) a confirmation dialog is displayed, and the user must select the persona.
- ♦ When cleared (disabled), the confirmation dialog will not display and one of the following occurs:
  - If the staff member is located, the sign-in or sign-out successful message displays.
  - If no staff member is returned as a match, a warning message is displayed.

9. For the **Volunteer** module, select the check boxes for the options you want enabled. Clear the check boxes for options you do not want enabled in the Kiosk.
   - **Volunteer Sign In** – Select or clear the check box to enable or disable volunteer sign-in capabilities.
   - **Volunteer Sign Out** – Select or clear the check box to enable or disable volunteer sign-out capabilities.
   - **Enable Volunteer Sign In Printing** – Select or clear the check box to enable or disable printing a badge during sign in.
   - **Mask Volunteer ID Number** – Select or clear the check box to enable or disable hiding the volunteer ID number on the screen.
10. Click **Save**.

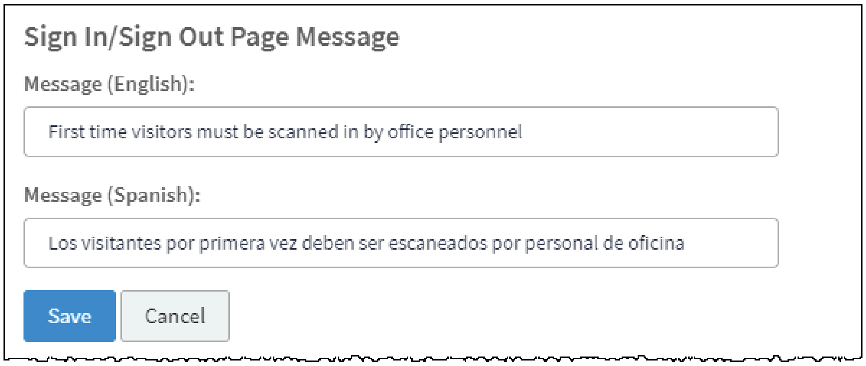
    A message displays in the lower right corner indicating the Profile was successfully saved.

Specify Kiosk Sign In/Sign Out Page Message

Users with the *Can Manage Kiosks* permission can specify a custom message to be displayed on the Kiosk Sign In/Sign Out page. You must be at the All Buildings level to specify the Sign In/Sign Out Page Message.

1. In the navigation menu, select **Kiosk Settings**.
2. On the **Profiles** tab, click the ▶ icon to expand the Profile Detail workspace.

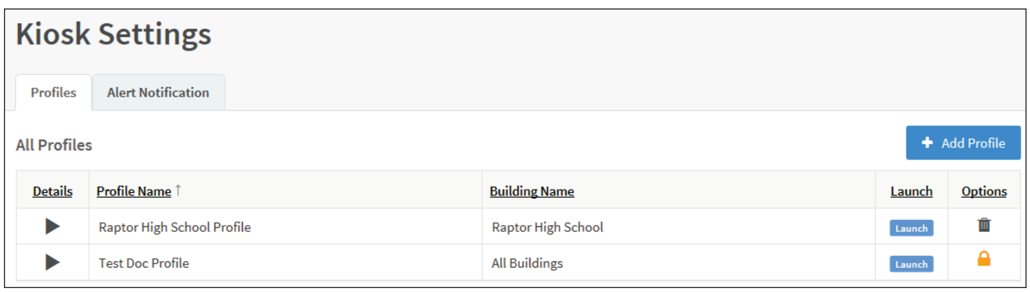
3. In the **Sign In/Sign Out Page Message** area, enter the message you want to be displayed on the Kiosk Sign In/Sign Out page. You can specify the text in English and/or Spanish.



4. Click **Save**.

Launch Kiosk

Users with the *Can Manage Kiosks* permission can use the **Profiles** tab on the **Kiosk Settings** workspace to launch a Kiosk.



> **Note** You must have a specific building selected in the Building Selector to be able to launch the Kiosk.

Perform the following steps to launch a kiosk:

1. In the navigation menu, select **Admin > Kiosk Settings**.
2. Select a building from the Building Selector.
3. In the **All Profiles** area on the **Profiles** tab, click the **Launch** icon to open the Kiosk.

   A confirmation dialog displays asking you to confirm that you want to launch the Kiosk. The Kiosk will open in a new browser window tab and it is recommended that you close the Raptor Console browser window tab after the Kiosk launches.

4. Click **Continue** to launch the Kiosk.

> **Note** Users with the *Can Launch Kiosks* permission can select the **Kiosk** menu item in the navigation menu to launch a Kiosk. See Kiosks.

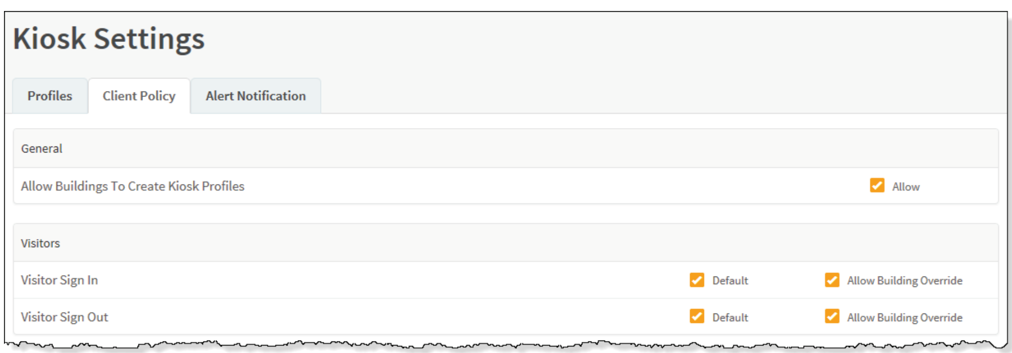
Manage Client Policy

If **All Buildings** is selected in the Building Selector, the **Client Policy** tab displays on the **Kiosk Settings** workspace. District Admins can use this workspace to control various settings such as whether Kiosk Profiles can be created at the building level and if the kiosk capabilities can be set for individual buildings.

The **Default** check box for the settings on the **Client Profile** tab indicates if an option is going to be selected by default when a new profile is created. If the **Default** check box is selected and the **Allow Override** check box is not selected, every kiosk profile created at the client or building level will inherit this setting and it cannot be turned off.

For example, if Building Admins can create Kiosk Profiles, the district may have a policy that *only* Staff and Volunteers can sign-in using the kiosk. Whereas, all Visitors and Students must go to the Front Desk to sign in and sign out.

In this scenario, the District Admin would use the Client Policy tab to set this policy by clearing the **Default** check boxes and **Allow Building Override** check boxes for Students and Visitors.



General Settings

Allow Building to Create Kiosk Profiles – Select or clear the **Allow** check box to indicate whether Building Admins can create Kiosk Profiles at the building level.

Click **Save** when you have completed specifying your settings.

Visitor Settings

- **Visitor Sign In** – Select or clear the **Default** check box to indicate if this option will or will not be automatically included in every kiosk profile created and the **Allow Building Override** check box to indicate if the setting can be overridden at the building level.
- **Visitor Sign Out** – Select or clear the **Default** check box to indicate if this option will or will not be automatically included in every kiosk profile created and the **Allow Building Override** check box to indicate if the setting can be overridden at the building level.

Contractor Settings

- **Contractor Sign In** – Select or clear the **Default** check box to indicate if this option will or will not be automatically included in every kiosk profile created and the **Allow Building Override** check box to indicate if the setting can be overridden at the building level.
- **Contractor Sign Out** – Select or clear the **Default** check box to indicate if this option will or will not be automatically included in every kiosk profile created and the **Allow Building Override** check box to indicate if the setting can be overridden at the building level.

Student Settings

- **Student Sign In** – Select or clear the **Default** check box to indicate if this option will or will not be automatically included in every kiosk profile created and the **Allow Building Override** check box to indicate if the setting can be overridden at the building level.
- **Student Sign Out** – Select or clear the **Default** check box to indicate if this option will or will not be automatically included in every kiosk profile created and the **Allow Building Override** check box to indicate if the setting can be overridden at the building level.
- **Student Sign Out by Parent** – Select or clear the **Default** check box to indicate if this option will or will not be automatically included in every kiosk profile created and the **Allow Building Override** check box to indicate if the setting can be overridden at the building level.

Staff Settings

- **Staff Sign In** – Select or clear the **Default** check box to indicate if this option will or will not be automatically included in every kiosk profile created and the **Allow Building Override** check box to indicate if the setting can be overridden at the building level.
- **Staff Sign Out** – Select or clear the **Default** check box to indicate if this option will or will not be automatically included in every kiosk profile

created and the **Allow Building Override** check box to indicate if the setting can be overridden at the building level.

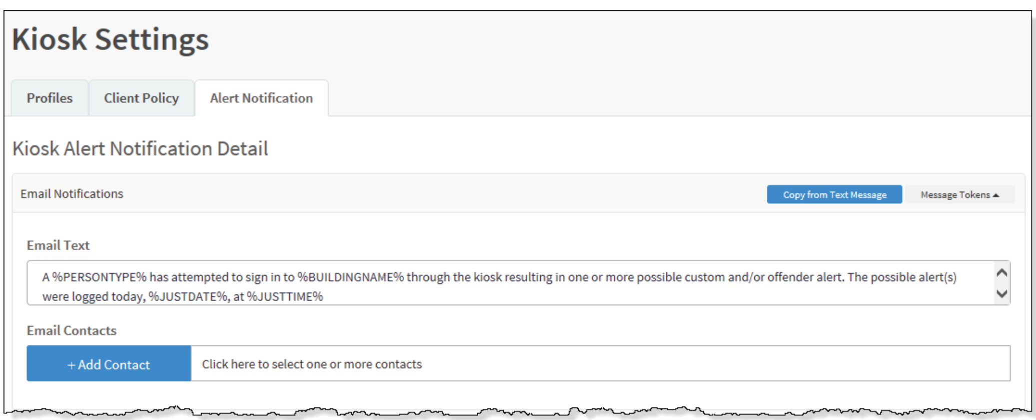
Volunteer Settings

- **Volunteer Sign In** – Select or clear the **Default** check box to indicate if this option will or will not be automatically included in every kiosk profile created and the **Allow Building Override** check box to indicate if the setting can be overridden at the building level.
- **Volunteer Sign Out** – Select or clear the **Default** check box to indicate if this option will or will not be automatically included in every kiosk profile created and the **Allow Building Override** check box to indicate if the setting can be overridden at the building level.
- **Volunteer Application** – Select or clear the **Default** check box to indicate if this option will or will not be automatically included in every kiosk profile created and the **Allow Building Override** check box to indicate if the setting can be overridden at the building level.

> **Note** Volunteer Application (the ability to apply to become a volunteer) is currently not supported through the kiosk.

Manage Alert Notifications

The **Alert Notification** tab is used to manage the alert notifications that are sent when someone signing into the kiosk generates a possible offender or custom alert. Use the **Kiosk Alert Notification Detail** workspace to specify the message that is sent and the contacts who should receive the notification.



Perform the following steps to set up the kiosk alert notifications:

1. In the navigation menu, select **Admin > Kiosk Settings**.
2. Click the **Alert Notification** tab.

3. Specify the following information and then click **Save**.

> **Note** Contacts must be defined prior to setting up notifications.

Email Notifications

- **Email Text** – The email message is pre-populated with a default message using message tokens but you can change this message if desired. This text is sent in addition to the Visitor/Offender or Visitor/Custom Alert information so if this email message field is left blank, the Visitor/Offender or Visitor/Custom Alert information is still sent.

  To use message tokens to compile the message, see Message Tokens for Kiosk Notifications.

  If you want the same text as that specified in the Text Message Notification, click **Copy from Text Message**.

- **Email Contacts** – Click **Add Contact** and select the contact name from the drop-down list. The contact information must be added prior to creating the email notification.

  > **Note** In the **Add Contact** drop-down list, the icons that display represent the contact's preferred method of notification.

  To remove an email contact, click the **X** in the contact label.

  > **Note** If the contact name is gray, it was defined at the district level and cannot be removed at the building level.

Text Message Notifications

- **Text Message** – The text message is pre-populated with a default message using message tokens, but you can change this message if desired. If this field is left blank, no text message is sent.

  To use message tokens to compile the message, see Message Tokens for Kiosk Notifications.

  If you want the same text as that specified in the Email Notification, click **Copy from Email**.

- **Text Message Contacts** – For those who want to be notified via a text message, click **Add Contact** and select the contact name from the drop-down list. The contact information must be added prior to creating the text message notification. Only those contacts that provided a text message phone can be selected from the list.

> **Note** In the **Add Contact** drop-down list, the icons that display represent the contact's preferred method of notification.

To remove a text contact, click the **X** in the contact label.

> **Note** If the contact name is gray, it was defined at the district level and cannot be removed at the building level.

Message Tokens for Kiosk Notifications

You can also use Message Tokens, which are variables, in the notification message so that when the message is sent, the tokens will be replaced by their associated value.

Click **Message Tokens** to view the variables that can be used in the message.

%CLIENTNAME% - District Name
%BUILDINGNAME% - Building Name
%JUSTTIME% - Time Logged - hh:mm: tt
%JUSTDATE% - Date Logged - MM/DD/YYYY
%PERSONTYPE% - Type of Person [attempting kiosk sign in] (e.g., Visitor, Volunteer, etc.)

Example:

A %PERSONTYPE% has attempted to sign in to %BUILDINGNAME% through the kiosk resulting in one or more possible custom and/or offender alert. The possible alert(s) were logged today, %JUSTDATE%, at %JUSTTIME%

Maintenance (Admin)

The **Maintenance** workspace enables users to manage various aspects of the product.

Merge Duplicate Records

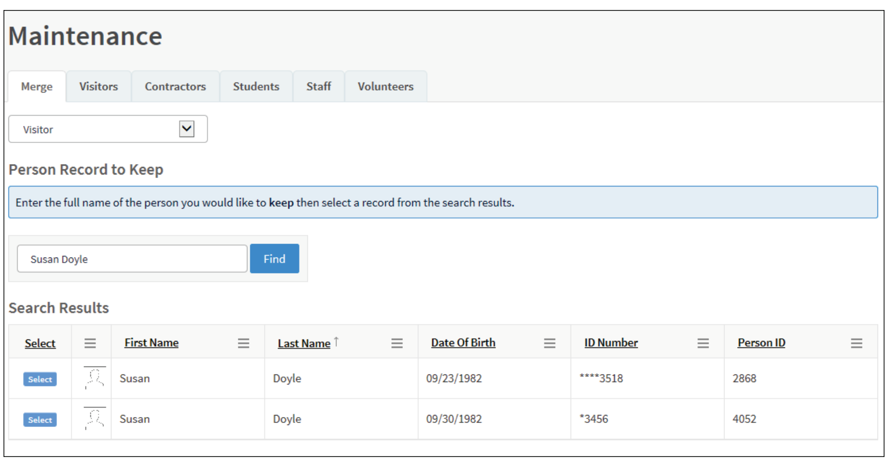
The Merge feature enables Administrators to merge duplicate person records for the same visitor. You must have the *Can Perform Maintenance* permission to view this tab.

This feature is used when a visitor was signed in twice, however the second time they were scanned in, the scanner may have incorrectly scanned their first name, last name, ID number or DOB which caused the system to create a new person record rather than using the existing visitor record.

The merge feature allows an Administrator to pull all the information for both records into a single record.

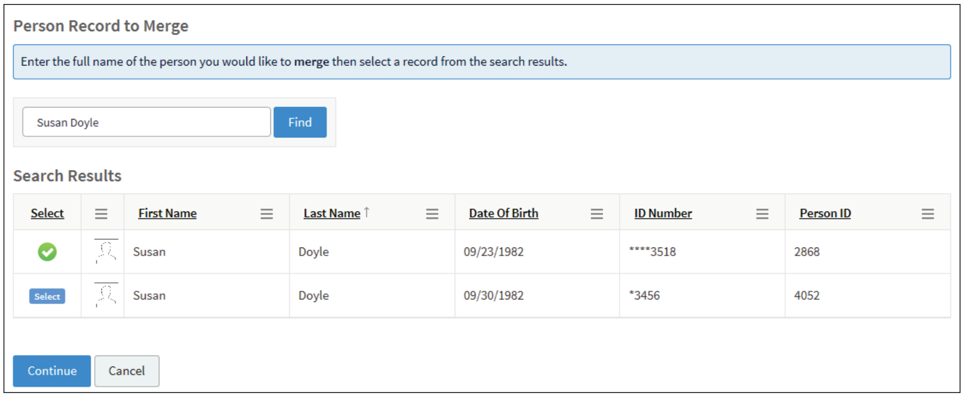
Perform the following steps to merge two records:

1. From the navigation menu, select **Admin > Maintenance**.
2. On the **Merge** tab, select **Visitor** from the drop-down list.
3. In the **Person Record to Keep** area, enter the first and last name of the person you would like to keep and then click **Find**.



4. Click **Select** next to the record you want to keep.

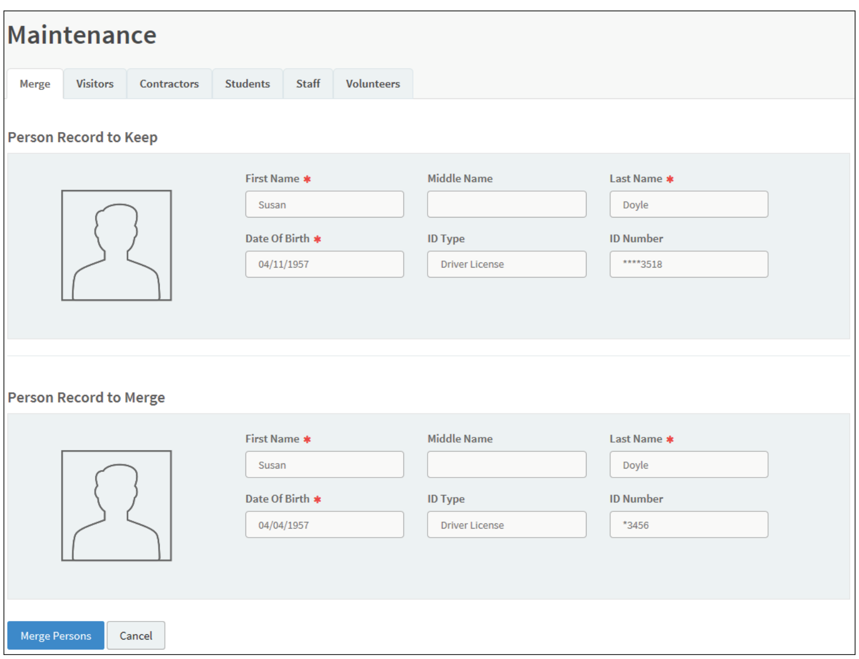
5. In the **Person Record to Merge** area, enter the first and last name of the person you would like to keep and then click **Find**.



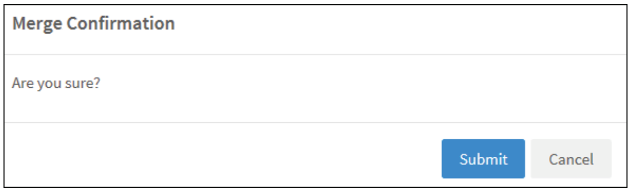
The icon displays next to the record you have selected to keep.

> **Note** You will not be able to merge a visitor record that was scanned into Raptor with a visitor record that was not scanned. In this case the merge (official) record will display the icon instead of the **Select** button.

6. Click **Select** next to the record you want to merge and then click **Continue**.



7. Review the information to confirm these are the records to be merged, and then click **Merge Persons**.

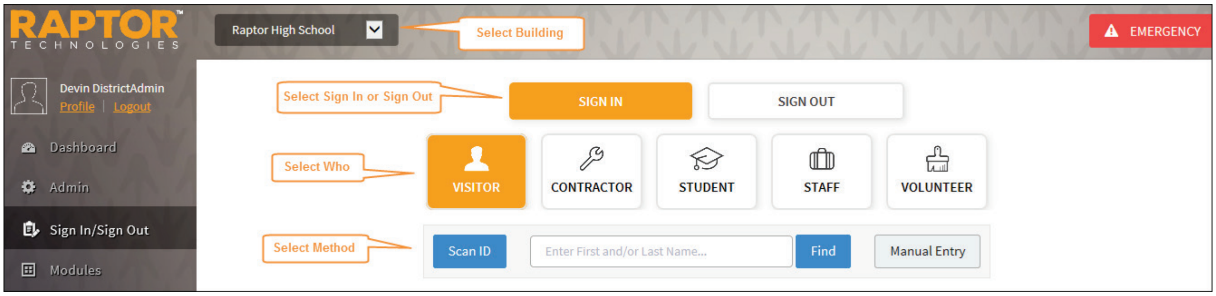


8. On the **Merge Confirmation** dialog, click **Submit**. If you want to discard the changes, click **Cancel**.

   A confirmation message displays indicating your merge was successfully submitted to the queue and will be completed at 8:00 PM CST.

Sign In/Sign Out

Use the **Sign In/Sign Out** workspace to sign in and sign out people entering your building.



Sign In

The following sign-in methods are available, depending who you are signing in:

- Use barcode reader to scan the 1D Barcode on a district-issued ID (visitors, contractors and volunteers)
- Use the Raptor optical scanner to scan a government-issued ID (visitors, contractors and volunteers)
- Use the Find feature (anyone who has an official record in the Raptor system)
- Use manual entry (anyone who has an official record in the Raptor system)

To sign in someone entering your building:

1. In the navigation menu, select **Sign In/Sign Out**.
2. On the **Sign In/Sign Out** workspace, the **Sign In** button is selected by default. If it is not already selected, click **Sign In**.
3. Click the button for who you are signing in (Visitor, Contractor, Student, Staff or Volunteer).

Scan 1D Barcode

Perform the following steps to sign in visitors, contractors and volunteers who have a district-issued ID or government-issued ID that contains a 1D barcode:

1. In the navigation menu, select **Sign In/Sign Out**.
2. On the **Sign In/Sign Out** workspace, wave the district-issued or government-issued ID under the barcode scanner.
3. Carefully verify that the information on the screen matches the information on the ID.
4. In the **Destination/Reason** field, specify the purpose for the visit; you can select a pre-defined destination/reason from the drop-down list or enter another destination/reason in the text field.

   If signing in a volunteer, select the **Function** from the drop-down list.
5. Click **Submit & Print** to print a badge, or click **Submit** to enter the information into the system without printing a badge.

   When the record is submitted, if the information matches the criteria for an offender or custom alert, a **Possible Offender Alert** or **Possible Custom Alert** displays on the screen. Proceed to Possible Offender and Custom Alerts.

Scan ID

Scanning an ID is the easiest and recommended method for signing in visitors, contractors and volunteers. You must have the Raptor Optical Scanner attached to your computer to use this feature.

1. In the navigation menu, select **Sign In/Sign Out**.
2. On the **Sign In/Sign Out** workspace, the **Sign In** button is selected by default. If it is not already selected, click **Sign In**.
3. Click the button for who you are signing in (Visitor, Contractor or Volunteer).
4. Insert the state-issued identification card into the scanner, face up, and click **Scan ID**.

> **Note** If the 2D barcode cannot be read but the photo is scanned, a message will be displayed indicating you need to manually enter the information. Click **OK** and then perform a Manual Entry.

5. Carefully verify that the information on the screen matches the information on the ID. If any of the information is incorrect, click the **Edit** button located to the right of the Last Name field, and modify any incorrect information before continuing the sign-in process.
6. In the **Destination/Reason** field, specify the purpose for the visit; you can select a pre-defined destination/reason from the drop-down list or enter another destination/reason in the text field.
7. Click **Submit & Print** to print a badge, or click **Submit** to enter the information into the system without printing a badge.

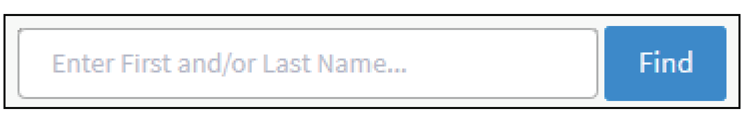
   When the record is submitted, if the information matches the criteria for an offender or custom alert, a **Possible Offender Alert** or **Possible Custom Alert** displays on the screen. Proceed to Possible Offender and Custom Alerts.

Find

The Find feature allows you to find people who are already in the Raptor system, quickly pull up their profile and sign them in.

> **Note** This sign-in method can be used to sign in anyone who was previously scanned or imported into the system. This method **must** be used to sign in students, staff members and volunteers.

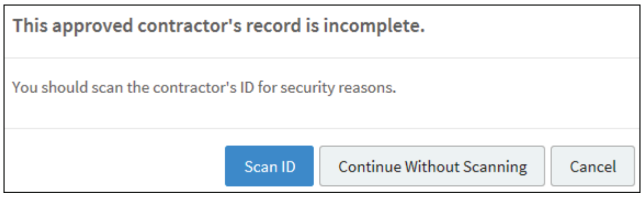
1. In the navigation menu, select **Sign In/Sign Out**.
2. On the **Sign In/Sign Out** workspace, the **Sign In** button is selected by default. If it is not already selected, click **Sign In**.
3. Click the button for who you are signing in (Visitor, Contractor, Student, Staff or Volunteer).
4. In the **Find** text box, type the **First Name** and/or **Last Name** and then click **Find**.



5. Perform one of the following actions depending on the search results:
   - If the system finds the exact match during the search, the person's information displays.

- If the system does not find an exact match, find the name in the **Search Results** list and then click **Sign In** next to the name of the person you are signing in.

When signing in a contractor, guardian or volunteer who has not been scanned into Raptor (for example, if their information was added or imported into Raptor and the ID wasn't scanned), a window displays informing you that the record is incomplete.



Click one of the following buttons to continue the sign in:

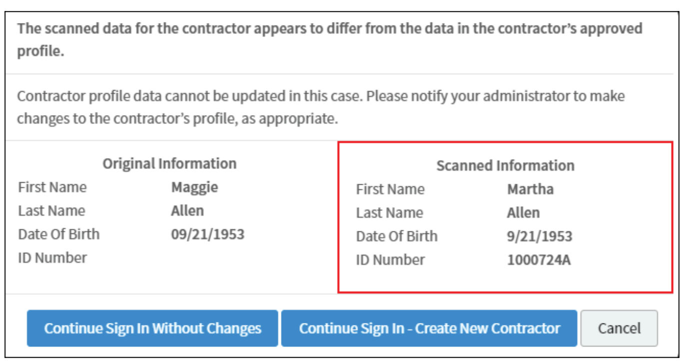
- **Scan ID** – Insert the person's ID in the scanner and click **Scan ID**.

  If there is a problem with the scan, the user can click **Rescan ID** or click **Edit** to modify the record.

  If the 2D barcode cannot be read but the photo is scanned, a message will be displayed indicating the scan was unsuccessful and provides the fields for you to manually enter the information. Enter the missing information and then click **Continue**.

  Contractor's Data Does Not Match Profile Information

  If a contractor's scanned data is different from the information in their profile, the following dialog displays.



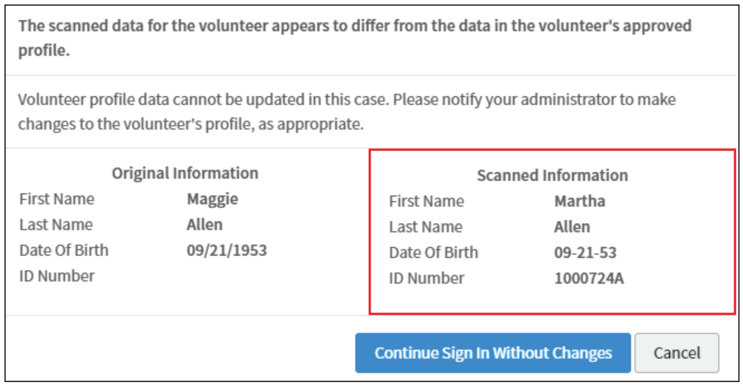
  They can continue sign in using one of the following methods:

  - **Continue Sign In Without Changes** – The scanned data will not be used and no changes will be made to their profile.

- ♦ **Continue Sign In – Create New Contractor** – A new contractor profile will be created for the contractor from the scanned data.
- ♦ **Cancel** – Exit the dialog and cancel the sign in.

Volunteer's Data Does Not Match Profile Information

If an approved volunteer's scanned data is different from the information in their profile, the following dialog displays:



They can continue sign in using one of the following methods:

- ♦ **Continue Sign In Without Changes** – The scanned data will not be used and no changes will be made to their profile.
- ♦ **Cancel** – Exit the dialog and cancel the sign in.

- ■ **Continue Without Scanning** (the next time the person signs in, the user will be asked again to scan their license).

  The **Details** workspace displays where the user can update the information.
- ■ **Cancel** – Exit the dialog and cancel the sign in.

6. If the person's record is missing a photo or the photo needs to be replaced, you can rescan their photo ID. Insert the photo ID into the scanner and click **Re-Scan**.
7. In the **Destination/Reason** field, specify the purpose for the visit (visitors, contractors or volunteers) or select the reason for late sign in for a student.

   You can select a pre-defined destination/reason from the drop-down list or enter another destination/reason in the text field (if signing in visitor, contractor or staff).
8. Click **Submit & Print** to sign in and print a badge, or click **Submit** to enter the information into the system without printing a badge.

When the record is submitted, if the information matches the criteria for an offender or custom alert, a **Possible Offender Alert** or **Possible Custom Alert** displays on the screen. Proceed to Possible Offender and Custom Alerts.

Manual Entry

The manual entry feature allows you to sign in a person by entering their information in the fields on the screen. This sign in method is often used when the ID cannot be scanned.

> **Note** This method ***cannot*** be used to sign in students, staff or volunteers.

1. In the navigation menu, select **Sign In/Sign Out**.
2. On the **Sign In/Sign Out** workspace, the **Sign In** button is selected by default. If it is not already selected, click **Sign In**.
3. Click the button for who you are signing in (Visitor or Contractor).
4. Click **Manual Entry** and then complete the fields on the screen. The following fields are required:
   - First Name
   - Last Name
   - Date of Birth
5. If you are signing in a contractor, select the **Company Name** from the drop-down list or select **Other** and then enter the company name.
6. In the **Destination/Reason** field, specify the purpose for the visit (visitors or contractors). You can select a pre-defined destination/reason from the drop-down list or enter another destination/reason in the text field.
7. Optionally, enter information in the **Notes** text box.
8. Click **Submit & Print** to sign in and print a badge, or click **Submit** to enter the information into the system without printing a badge.

   When the record is submitted, if the information matches the criteria for an offender or custom alert, a **Possible Offender Alert** or **Possible Custom Alert** displays on the screen. Proceed to Possible Offender and Custom Alerts.

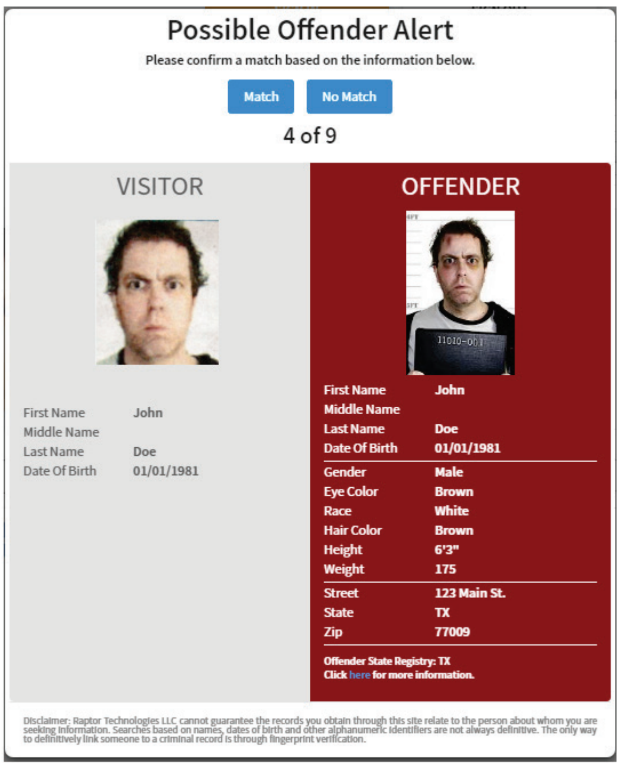
Possible Offender and Custom Alerts

If an alert (**Possible Offender Alert** or **Possible Custom Alert**) displays on the screen during sign-in, perform the following steps:

1. Analyze the search results. Because there can be multiple possible matches, it is very important that you carefully compare the information displayed on the screen for **Your Visitor** and the **Offender** or **Custom Alert** information.

   It is recommended that you compare the middle name, height, weight, race, and other physical details to verify a match. Not all states provide a photo and details of their offenders.

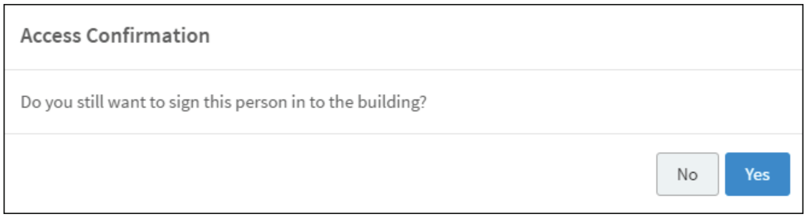
   > **Note** Raptor also matches on offender alias names. If this occurs, an *Alias Match* message displays below the offender's photo.



2. Confirm whether the information displayed on your screen is a match to the person being signed in. Perform one of the following actions:

Match

1. If the information displayed on the screen is a match, click **Match**.



2. On the **Access Confirmation** dialog, click **Yes** to proceed with sign in and print a badge (if you previously clicked **Submit & Print**), or click **No** to cancel the sign in process.

   Follow your school/district policies and procedures for handling alerts. The relevant response personnel and a Raptor technician are notified.

No Match

If the information displayed on the screen does not match your visitor's information, click **No Match**. If there are multiple records, the next possible match will display on the screen.

When **No Match** is selected, the record for that person is flagged by Raptor on the backend so that it does not display on subsequent sign ins.

Sign Out

Use one of the following methods to sign out someone when they leave the building.

Scan 1D Barcode

If you have the 1D barcode reader installed, you can sign out visitors, contractors or volunteers by scanning the 1D barcode on their district-issued ID or the 1D barcode that is printed on their badge (if the *Print 1D barcode on badge* feature is enabled).

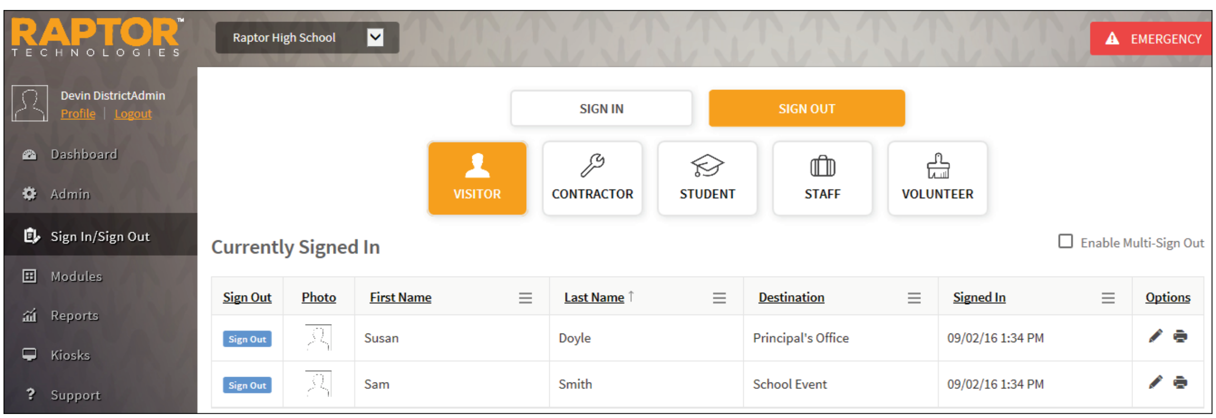
1. From the navigation menu, select **Sign In/Sign Out**.
2. Wave the badge under the 1D barcode scanner to sign out the person.

   A message displays indicating sign out was successful.

Manual Sign Out

Perform the following steps to manually sign out a person leaving the building:

1. From the navigation menu, select **Sign In/Sign Out** and then click **Sign Out**.
2. Click the button for who you are signing out (Visitor, Contractor, Student, Staff or Volunteer).



Note If signing out a student, see Sign Out Students.

3. Find the name of the person in the **Currently Signed In** list and then click **Sign Out**.

> **Notes**
> - If a visitor's name is highlighted in blue, it indicates they were a match to a custom alert.
> - If a visitor's name is highlighted in red, it indicates they were a match to an offender alert.

Multiple Sign Out

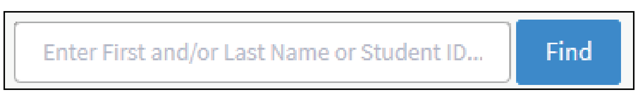
You can also sign out multiple people at one time.

1. On the **Currently Signed In** workspace, select the **Enable Multi-Sign-Out** check box in the upper right corner.
2. In the **Sign Out** column, select the check box next to the name of all the people to be signed out, and then click **Sign Out.**

Sign Out Students

To sign out students when they leave the building, perform the following steps:

1. From the navigation menu, select **Sign In/Sign Out** and then click **Sign Out**.
2. Click **Student**.
3. In the **Find** text box, enter the **First Name** and/or **Last Name** or the Student's **ID number**.
4. Click **Find**.



If the system finds the exact match during the search, the person's information displays.

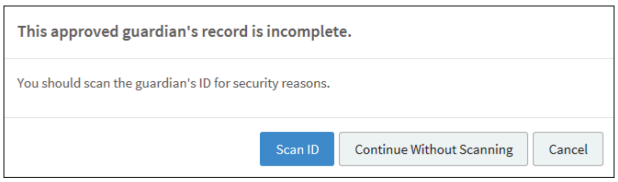
5. If the system does not find an exact match, find the name in the **Search Results** list and then click **Sign Out** next to their name.

Use one of the following methods to complete the student sign out process.

Guardian Pickup

1. If the person picking up the student is listed in the **Guardian** area, select the check box next to the name of the person signing out the student and click **Guardian Sign-Out**.

   If the selected guardian does not have a complete record (for example, if the guardian's information was added or imported into Raptor and the ID wasn't scanned), a window displays informing you that the guardian’s record is incomplete.



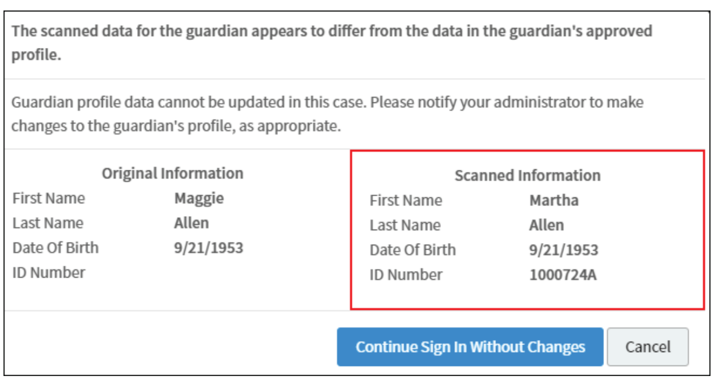
2. Click one of the following buttons to continue:

   - **Scan ID** – Insert the guardian’s ID in the scanner and click **Scan ID**.

     If there is a problem with the scan, the user can click **Rescan ID** or click **Edit** to modify the guardian’s record.

     Guardian’s Data Does Not Match Profile Information

     If a guardian’s scanned data is different from the information in their profile, the following dialog displays:



     They can continue sign in using one of the following methods:

     - **Continue Sign In Without Changes** – The scanned data will not be used and no changes will be made to their profile.
     - **Cancel** – Exit the dialog and cancel the sign in.

- **Continue Without Scanning**. (The next time the guardian picks up the student, the user will be asked again to scan their license.)

  The **Guardian Details** workspace displays where the user can update the guardian details or sign out additional students.

  - If the guardian is signing out additional students at the same time (and is authorized to sign out), click **Add Students** and enter the name(s) of the students the guardian is authorized to sign out.
  - Select the check box next to the name of each student the guardian is signing out and then click **Continue**.
- **Cancel** – Exit the dialog and select a different guardian or perform a **One-Time Pickup**.

3. Select the **Destination/Reason** for sign out from the drop-down list and then click **Submit & Print** or **Submit**.

> **Note** If **Submit & Print** is selected, a Student Pickup badge is printed that includes the guardian's name and the name of the student(s) being signed out.

One-Time Pickup

1. If the person picking up the student is not an approved guardian listed in the **Guardian** area, click **One-Time Pickup**.
2. Specify the person who is picking up the student by scanning their ID, entering their name in the **Find** text box, or manually entering their information.
3. Select the **Destination/Reason** for sign out from the drop-down list.
4. In the **Promote to Approved Guardian** field, select **Yes** or **No** from the drop-down list to indicate whether this person should be added as an approved guardian for the student.

> **Note** This field is only visible if the **Allow One-Time Pickup to Become Approved Guardian** field is set to **Yes** in the **Student Sign-In/Sign-Out Settings**.

5. Click **Submit & Print** or **Submit**.

> **Note** If **Submit & Print** is selected, a Student Pickup badge is printed that includes the guardian's name and the name of the student(s) being signed out.

Self Sign-Out

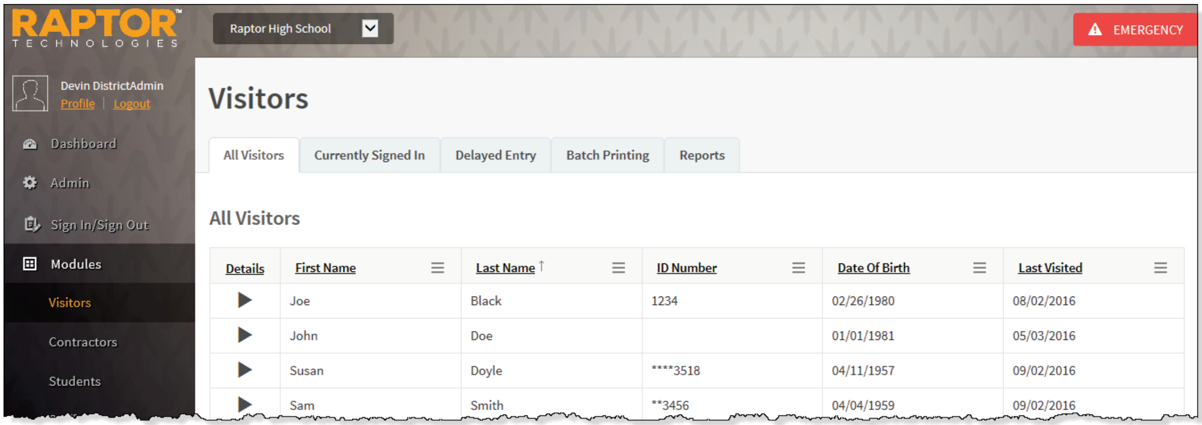
If the student has permission to perform Self Sign-Out, their profile will display **Yes** in the **Allow Self Sign-Out** field. In this scenario, perform the following steps to sign out the student:

1. Click **Self Sign-Out**.
2. Select the appropriate **Destination/Reason** from the drop-down list.
3. Click **Submit & Print** or **Submit**.

Note If **Submit & Print** is selected, a Student Pass is printed.

Managing Visitors

You can manage the visitors to the building using the **Visitors** workspace. Select **Modules > Visitors** in the navigation menu and then click the tab in the **Visitors** workspace for the tasks you want to perform.



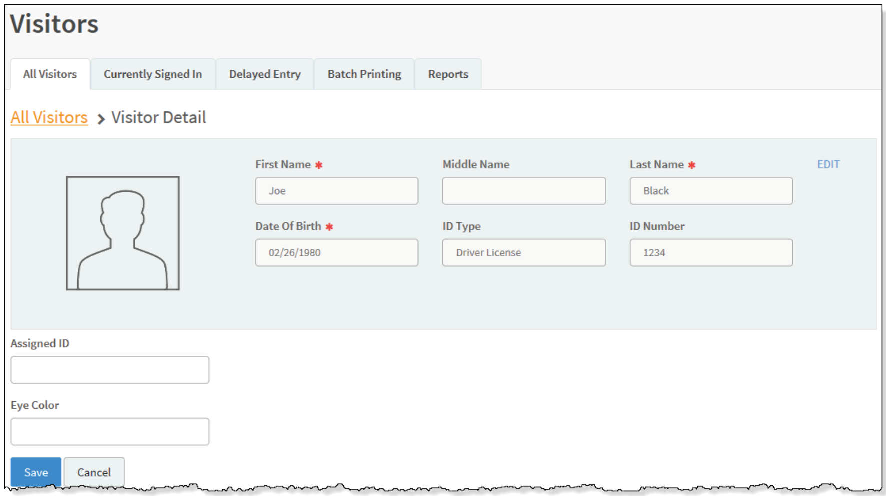
All Visitors

Users with Administrator permissions can use the **All Visitors** tab to view a list of all visitors who have been scanned in to the building. It also shows a detailed view of sign-in/sign-out history for a specific visitor.

View and Modify Visitor Details

To view the details about a specific visitor:

1. Click the ▶ icon to expand the **Visitor Detail** and view the information in the visitor record.
2. Click **Edit** to modify the information in the visitor record.



You can modify the following information (asterisk * indicates a required field):

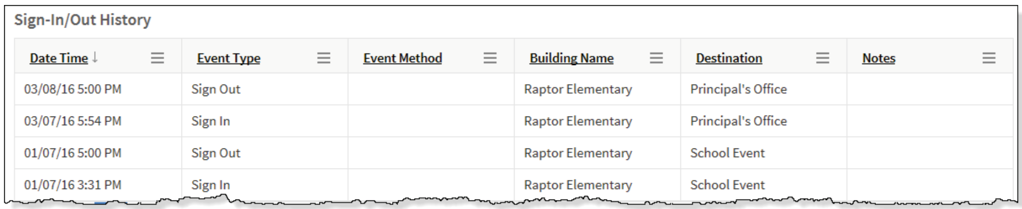
- **First Name***
- **Middle Name**
- **Last Name***
- **Date of Birth*** – Click the icon and select the date and year.
- **ID Type** – Type of government-issued ID that was used for identification (for example, Driver License or Passport).
- **ID Number** – The identification number associated with the government-issued ID Type.
- **Official Record** – Select this check box if the visitor record should become a permanent record in the Raptor system. If selected, the visitor name will be found in the system when using the Find feature.
- **Assigned ID** – Used to store a non-government ID number can be used for signing out via a 1D barcode reader if the *Print 1D Barcode on Badge* feature is enabled. The Assigned ID must be a minimum of 4 characters.

3. Click **Save** to update the record.

View Sign-In/Sign-Out History

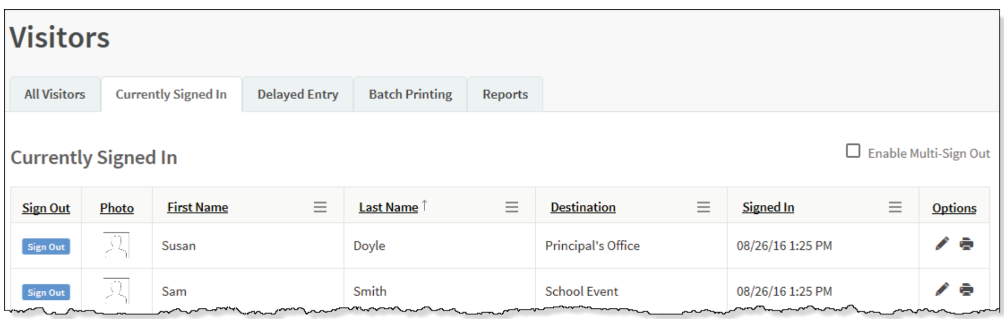
The **Sign-In/Out History** area on the **Visitor Detail** workspace displays a log of sign-in and sign-out events for the selected visitor. By default, the Date/Time, Event Type, Building Name and Destination columns display.

From the column menu, you can also select to display the Event Method (hidden by default) and Notes columns.



Currently Signed In Visitors

Use the **Currently Signed In** tab to view all visitors who are currently signed in. You can also perform the following tasks from this tab.



View Currently Signed In Visitor Information

View the visitors who are currently signed in, their photo, sign-in date and time, destination/reason for the visit, and any notes associated with the visitor.

> **Notes**
>
> - If a signed in visitor matches a custom alert, their first name and last name will be highlighted in blue.
> - If a visitor's name is highlighted in red, it indicates they were a match to an offender alert.

Modify Destination/Notes

Modify where the visitor is in the building or the reason for the visit, and any notes associated with the visit:

1. In the **Options** column, click the ✎ icon and select a new **Destination** from the drop-down list or enter it in the text field.
2. Enter or modify the **Notes** field, if necessary.
3. Click the ✔ icon to save your changes. If you want to cancel your changes, click the ✖ icon.

> **Note** If you change the Destination of a visitor, they will be signed out and then immediately signed in with the new destination. This information will display in the Sign-In/Sign-Out history for the visitor.

Print or Reprint Badge

If a visitor has lost their badge or changed their destination, or the printer has malfunctioned, you can reprint their badge.

In the **Options** column, click the 🖶 icon to print or reprint the visitor's badge.

Sign Out Visitors

You can sign out a single visitor or multiple visitors.

- To sign out a single visitor, click **Sign Out** next to the visitor's name.
- To sign out multiple visitors, select the **Enable Multi-Sign-Out** check box in the upper right corner, select the check box next to all the visitors to be signed out, and then click **Sign Out**.

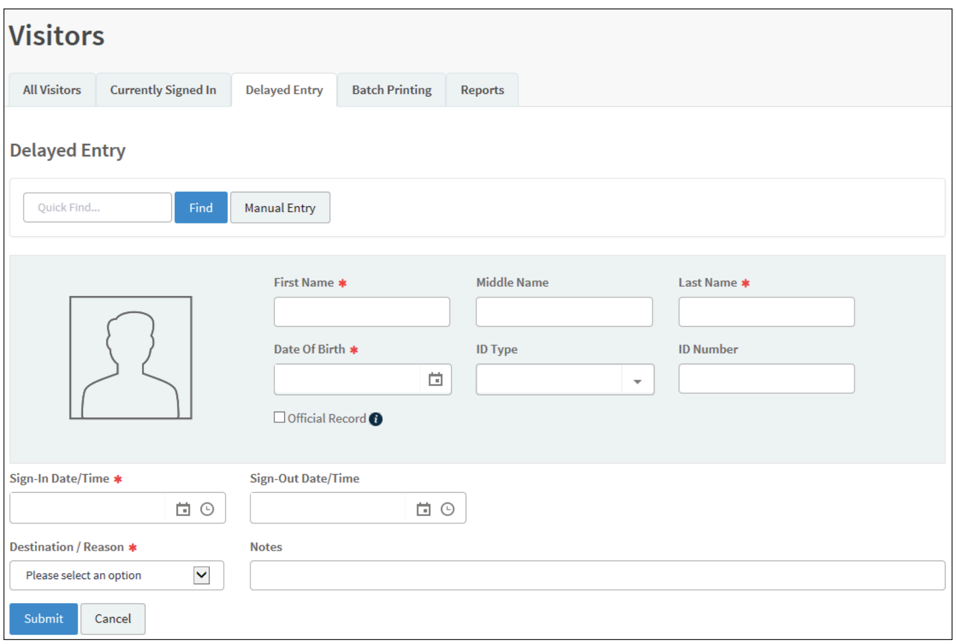
  To return to single sign-out mode, clear the **Enable Multi-Sign-Out** check box.

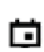
Delayed Sign In and Sign Out

> **Note** This feature is not visible at the All Buildings level.

If you are unable to sign in or sign out due to equipment issues or internet connection issues, you can use the **Delayed Entry** feature to manually enter the sign-in and sign-out date and time. This feature allows users to record the actual sign-in and sign-out times but the entry is delayed until the system is available.

1. Select the school from the Building Selector (you must select a specific building to use the delayed entry feature).
2. From the navigation menu, select **Modules > Visitors** and click the **Delayed Entry** tab.
3. If the person has previously been scanned into Raptor, enter their **First Name** or **Last Name** in the text field, click **Find** and then select the person from the search results.



4. If the person has not previously been entered into Raptor, click **Manual Entry** and enter the following information (asterisk * indicates a required field):
   - **First Name***
   - **Last Name***
   - **Date of Birth*** – Click the  icon and select the date and year.

- **ID Type** – Select the type of government-issued ID that was used for identification (for example, Driver License or Passport).
- **ID Number** – Enter the identification number associated with the government-issued ID Type.
- **Official Record** – Select this check box if the visitor record should become a permanent record in the Raptor system.
- **Sign-In Date/Time*** – Click the icon to select the date and then click the icon to select the time that the person signed in.
- **Sign-Out Date/Time** – If the system was still down when the person signed out, click the icon to select the date and then click the icon to select the time that the person signed out.

  > **Note** The **Sign-In Date** and **Sign-Out Date** must be the same date.

- **Destination/Reason*** – Specify the purpose for the visit. You can select a pre-defined destination/reason from the drop-down list or enter another destination/reason in the text field.

> **Note** If you manually enter the person's information, their information will not be found using the **Find** feature on future visits until their ID has been scanned into Raptor.

5. Click **Submit**.

   A *Delayed Entry Successful* message displays in the lower right corner of the screen.

Batch Printing

> **Note** This feature is not visible at the All Buildings level.

The Batch Printing feature enables users to run a batch of visitors through the sex offender and custom alert checks, and then print their badges in advance of a school event where many visitors are expected to sign in for the same event at the same time.

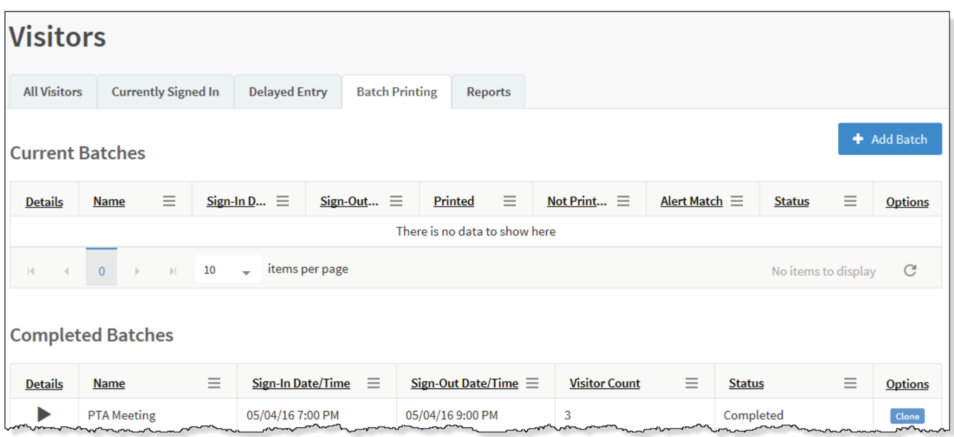
Using this feature speeds up the sign in process for an event and helps prevent a long line of visitors at the Front Desk. When the visitors arrive, you simply look at their ID and hand them their badge.

While running the batch, if one or more visitors are flagged with an offender or custom alert, the user can view the alerts and decide if the person is a match. If they are a match, no badge is created and they will not be signed in at the time designated in the **Batch Detail**.

Add Batch Print Job

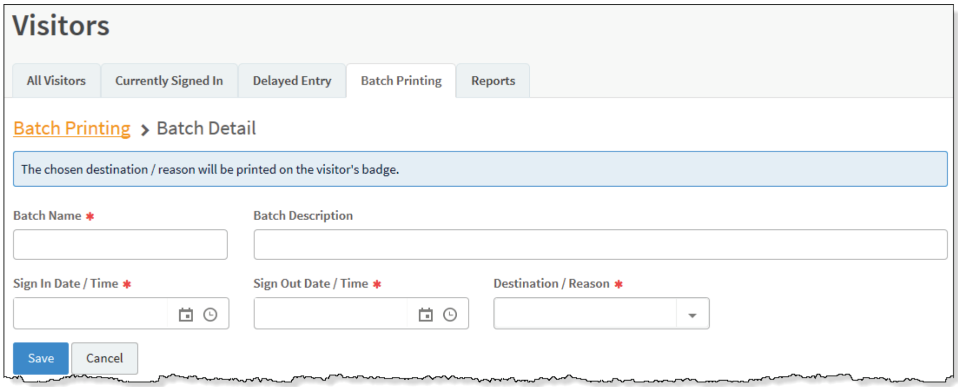
Perform the following steps to add and execute a batch print job.

1. Select the school from the Building Selector (you must select a specific building).
2. From the navigation menu, select **Modules > Visitors** and then click the **Batch Printing** tab.



3. Click **Add Batch**.

> **Note** You can also copy a **Completed Batch** job and modify it to create a new batch job. See Cloning Batch Print Job.

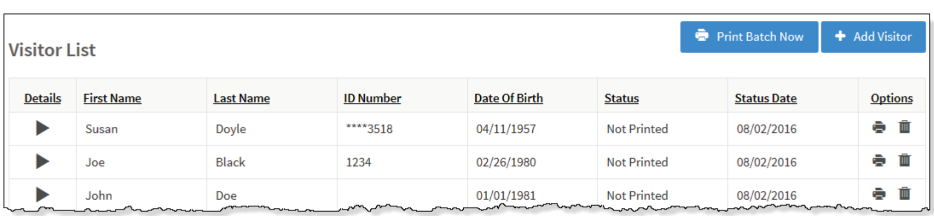


4. Enter the following information on the **Batch Detail** workspace (asterisk * indicates a required field):
   - **Batch Name*** – Enter a name for the batch job.
   - **Batch Description** – Enter a description for the batch job.
   - **Sign-In Date/Time*** – Click the icon to select the sign-in date and then click the icon to select the sign-in time.
   - **Sign-Out Date/Time*** – Click the icon to select the sign-out date and then click the icon to select the sign-out time.

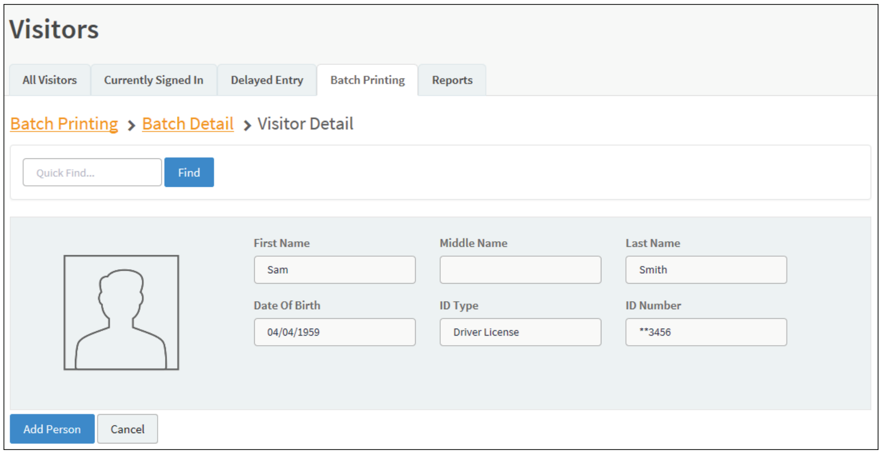
     > **Note** The **Sign-In Date** and **Sign-Out Date** must be the same date.

   - **Destination/Reason*** – Select where the person is going in the building or the reason for the visit from the drop-down list. You can also enter a custom value in the text field.
5. Click **Save**.
6. In the **Visitor List** area on the **Batch Detail** workspace, click **Add Visitor**.

   > **Note** You can only add visitors to the batch if they have previously signed in and have an official record in the Raptor system.



7. Enter the visitor’s name in the text box and then click **Find**.
8. In the search results, click **Select** next to the visitor’s name.



9. On the **Visitor Detail** workspace, click **Add Person**.
10. Repeat Step 6 through Step 9 for all visitors to be added to the batch.

Execute Batch Printing

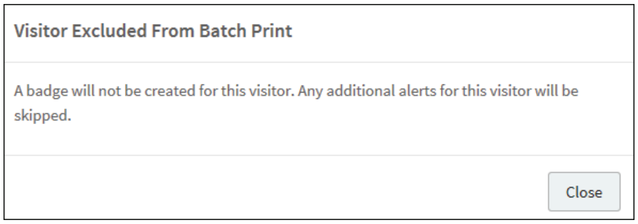
You can execute and print the batch from either the **Batch Printing** workspace or the **Batch Detail** workspace.

1. Use one of the following methods to execute and print the batch:
   - From the **Current Batches** area on the **Batch Printing** workspace, click the icon in the **Options** column to execute the batch.
   - From the **Visitors List** area on the **Batch Print Details** workspace, click **Print Batch Now**.

   The following confirmation dialog displays.

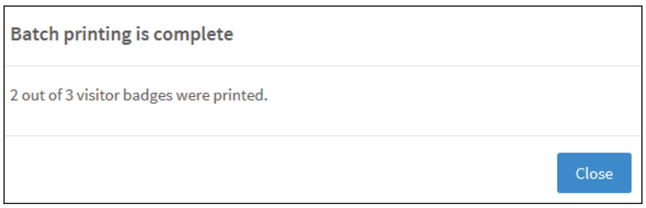
2. Click **Continue**.
3. If a Possible Offender alert displays for any of the visitors in the batch, review the information and determine if it is a match. See Possible Offender and Custom Alerts.

   If the visitor is a match to an offender or custom alert, the badge will not be printed and the following dialog displays.



4. Click **Close** to exit the dialog and continue with the batch printing.

   When all the badges have printed, a dialog displays indicating the **Batch printing is complete** and displays how many badges were printed.



5. Click **Close** to exit the dialog.

   On the date and at the time specified in the Batch Print **Sign-In Date/Time**, the visitors will be automatically signed in to the Raptor system.

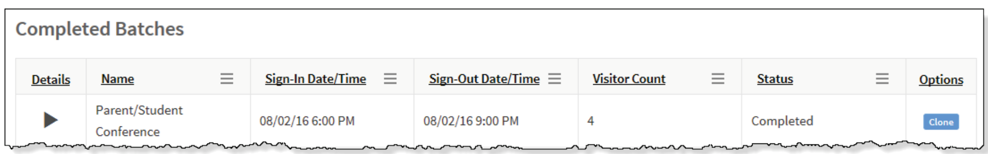
   On the date and at the time specified in the Batch Print **Sign-Out Date/Time** field, the visitors will be automatically signed out.

> **Notes**
>
> - A batch print is not complete until both the sign-in and sign-out times have elapsed. Up until the sign-out time has elapsed, the batch print is still considered active and can be modified.
> - Once the sign-out time has elapsed, the batch print is considered complete and will be moved to the Completed Batches grid.

Cloning Batch Print Job

The Clone Batch feature enables you to copy a **Completed Batch** job and modify it to create a new batch job. Perform the following procedure to clone a batch print job:

1. Select the school from the Building Selector (you must select a specific building).
2. From the navigation menu, select **Modules > Visitors** and then click the **Batch Printing** tab.
3. In the **Completed Batches** area, click **Clone** in the **Options** column for the batch job you want to copy.



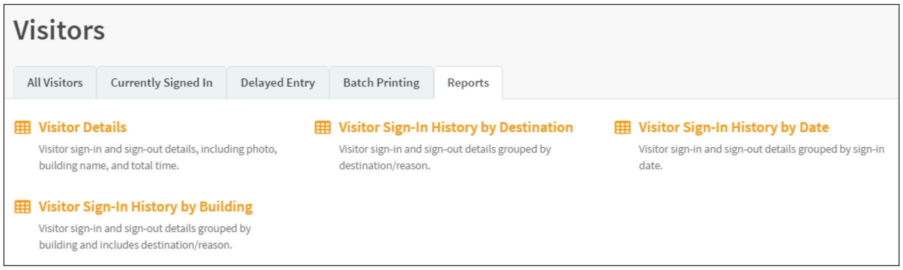
4. On the **Batch Detail** workspace, enter the following information (asterisk * indicates a required field):
   - **Batch Name*** – Optionally, modify the batch job name.
   - **Batch Description** – Optionally, modify the description for the batch job.
   - **Sign-In Date/Time*** – Click the icon to select the sign-in date and then click the icon to select the sign-in time.
   - **Sign-Out Date/Time*** – Click the icon to select the sign-out date and then click the icon to select the sign-out time.

     Note The **Sign-In Date** and **Sign-Out Date** must be the same date.

   - **Destination/Reason*** – From the drop-down list, select where the person is going in the building or the reason for the visit.
5. Click **Save**.

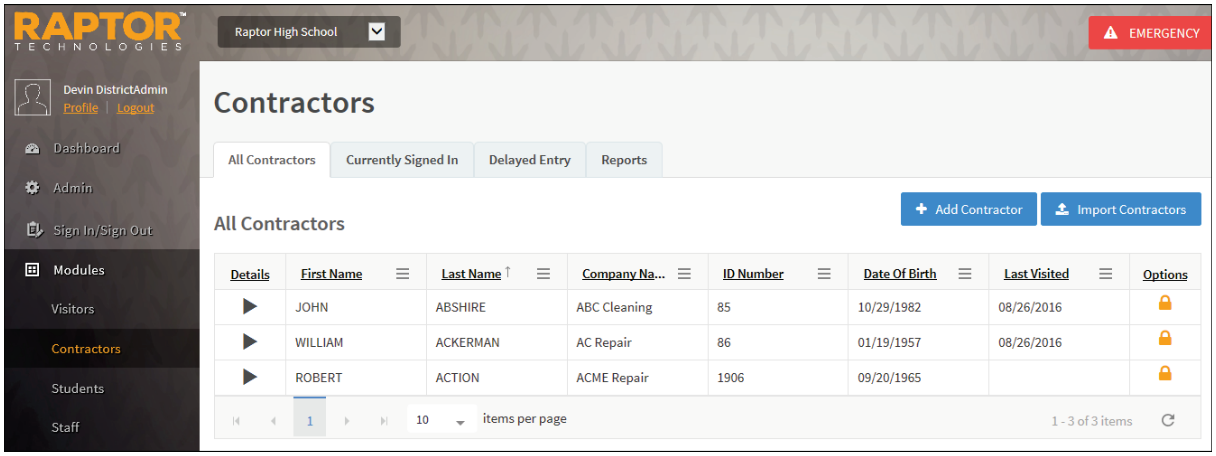
Visitor Reports

Use the **Reports** tab to run reports for visitor activity. See Visitor Reports.



Managing Contractors

You can manage the contractors in your building using the **Contractors** workspace. Select **Modules > Contractors** in the navigation menu and then click the tab in the **Contractors** workspace for the tasks you want to perform.



All Contractors

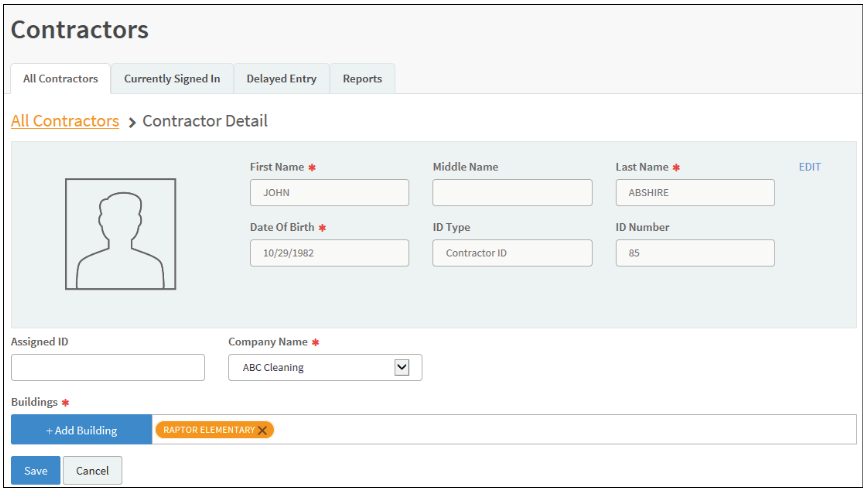
Administrators with the *Can Manage Contractors* permission can use the **All Contractors** tab to add new contractors and to view, edit and delete all contractors who have been added to the Raptor system.

From this tab, administrators can also import multiple contractors into Raptor if they have the *Can Import Contractors* permission. See Import Contractors.

Add Contractor

Perform the following steps to manually add a contractor:

1. From the navigation menu, select **Modules > Contractors**.
2. On the **All Contractors** workspace, click **Add Contractor**.
3. On the **Contractor Detail** workspace, use one of the following methods to add the contractor's information:
   - Insert their ID into the scanner and click **Scan ID**.
   - Enter their **First** or **Last Name** in the **Quick Find** text box and click **Find**.
   - Manually enter the information in the fields on the workspace.



If you are manually entering the following information, complete the following fields (* indicates required field):

- **First Name***
- **Last Name***
- **Date of Birth*** – Click the icon and select the date and year.
- **ID Type** – Type of ID used for identification (for example, Driver License or Passport). You can also enter the type of ID in the text field.
- **ID Number** – The identification number associated with the ID Type.

4. If you want to use the Find feature to sign in the contractor on future visits, select the **Official Record** check box so that the contractor's record will be stored in the Raptor system.
5. If the contractor has an assigned ID, enter it in the **Assigned ID** text box. This is a non-government ID number that can be used for signing in via the 1D barcode reader. The Assigned ID must be a minimum of four characters.
6. From the **Company Name** drop-down menu, select the company who employs the contractor. If the company name is not listed, select **Other** and enter the name in the **Other Company Name** field or add the company to the All Companies section in the <u>Managing Contractor Module Settings</u>.
7. In the Buildings area, click **Add Building** and select the **Building** the contractor can access.
8. Click **Save**.

Import Contractors

The Import Contractors utility enables Administrators with the *Can Import Contractors* permission to add multiple contractors into the Raptor system. It also includes the ability for unattended import of contractors by creating a manifest file that includes information about the field mapping and file to be imported.

> **Note** To use this feature, you must first create an Excel spreadsheet or comma delimited file that contains the required information.

The file can contain the following Contractor information to be imported:

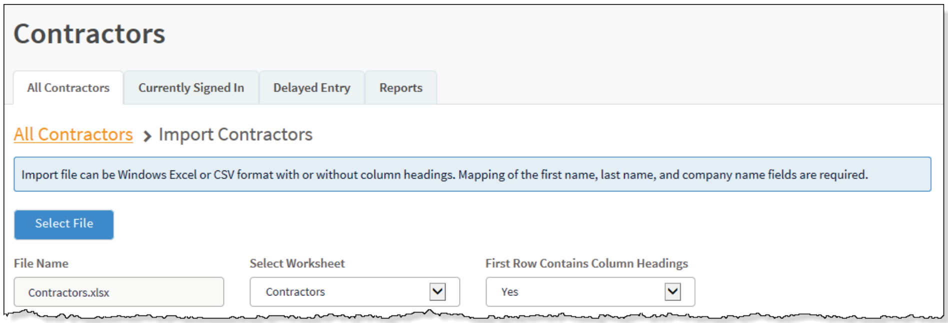
- First Name*
- Last Name*
- Middle Name
- Date of Birth
- ID Type
- ID Number
- Company Name*

*Indicates required information.

> **IMPORTANT!**
>
> Although not required, it is important that the import file also includes the contractor's Date of Birth to avoid having duplicate records created for the contractor during the import process.

Perform the following steps to import a list of contractors into Raptor:

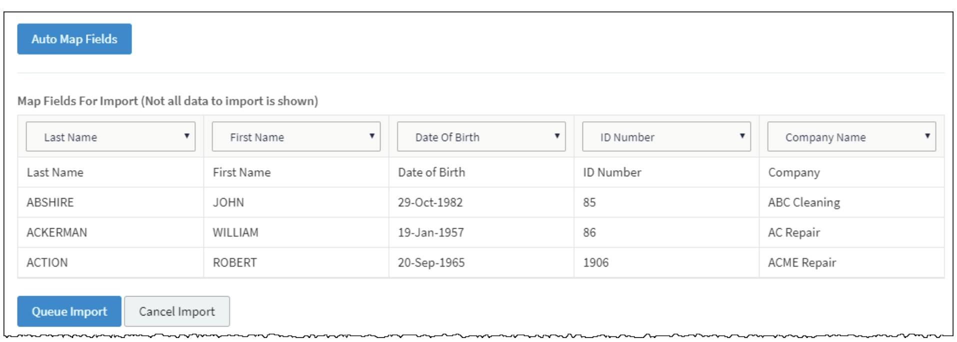
1. From the navigation menu, select **Modules > Contractors**.
2. On the **All Contractors** workspace, click **Import Contractor**.
3. Click **Select File** and navigate to the location where the file is saved on your computer.
4. Select the **Excel** or **CSV** file and click **Open**.



5. If you used Excel and the file contains multiple worksheets, select the worksheet that contains the contractor information from the **Select Worksheet** drop-down list.
6. If the first row of the worksheet contains column headings, select **Yes** from the **First Row Contains Column Headings** drop-down list and this row will not be imported. Otherwise, select **No**.
7. Click **Auto Map Fields** to automatically map the column headings in the file to the mapping names in Raptor. The names must be identical.

   You can also manually map each of the columns to be imported by selecting the appropriate fields in the drop-down menu above each column that displays.

   > **Note** First Name, Last Name, and Company Name are required columns. The columns with **Ignore** selected with not be imported.



8. If you want to create a manifest file to schedule automatic imports, click **Save Manifest** and save the file. You can then schedule the imports using a scheduling utility. See Using Manifest Import.

9. Click **Queue Import**.

   A message displays in the lower right corner of the screen stating that the import job was successfully added to the import queue for processing.

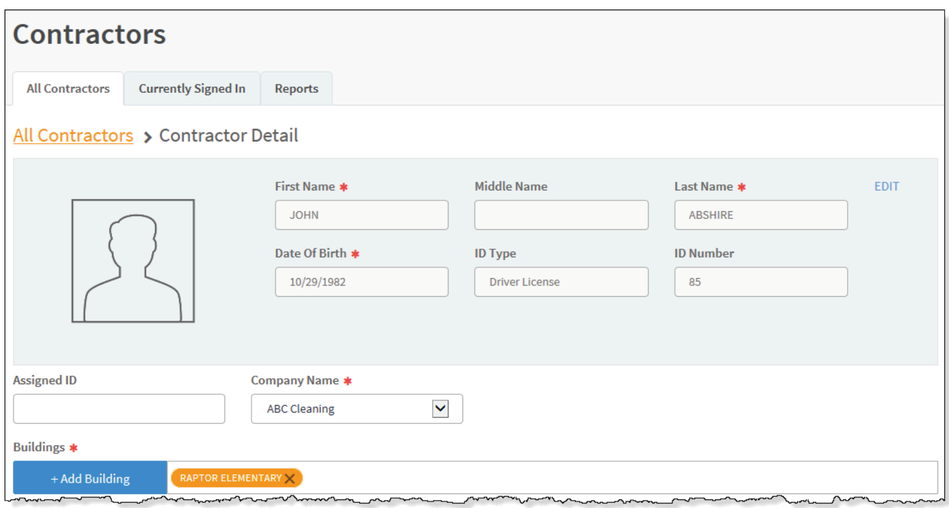
   When the import has completed processing, an email will be sent to the email address of the user indicating the number of records successfully imported and any error that may have occurred.

   > **Note** Imported company names will automatically be added to the **All Companies** data grid.

View and Modify Contractor Details

To view or modify the details about a specific contractor:

1. From the navigation menu, select **Modules > Contractors**.
2. On the **All Contractors** workspace, click the ▶ icon next to the contractor's name to expand the **Contractor Detail** workspace.



3. Click **Edit** to modify any of the following information in the contractor record (asterisk * indicates a required field):
   - **First Name***
   - **Middle Name**
   - **Last Name***
   - **Date of Birth*** – Click the icon and select the date and year.
   - **ID Type** – Type of ID that was used for identification. You can also enter the type of ID in the text field.
   - **ID Number** – The identification number associated with the ID Type.

- **Official Record** – Select this check box if the contractor record should become a permanent record in the Raptor system.
- **Assigned ID** – Used to store a non-government ID number that can be used for signing in via a 1D barcode reader (this feature is not yet supported in the product). The Assigned ID must be a minimum of 4 characters.
- **Company Name*** – The name of the company that employs the contractor.
- **Buildings*** – Click **Add Building** and select the **Building** the contractor is allowed to visit.

> **Note** Buildings will only be displayed at the client level (All Buildings).

4. Click **Save** to update the record.

View Sign-In/Sign-Out History

The **Sign-In/Out History** area on the **Contractor Detail** workspace displays a log of sign-in and sign-out events for the selected contractor. By default, the Date/Time, Event Type, Building Name and Destination columns display.

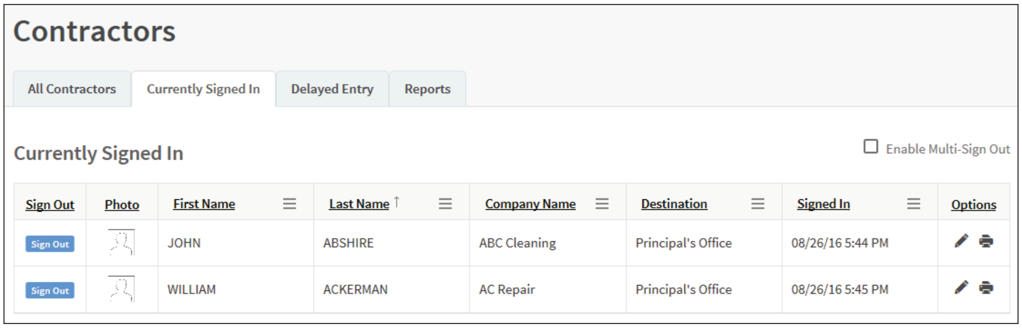
From the column menu, you can also select to display the Event Method and Notes columns.

Sign-In/Out History

Date Time ↓	Event Type	Event Method	Building Name	Destination	Notes
05/09/16 2:14 PM	Sign In	Operator Assisted	Raptor Elementary	Principal's Office	Fixing plumbing
03/17/16 5:00 PM	Sign Out		Raptor Elementary	Principal's Office	Fix Plumbling
03/17/16 3:02 PM	Sign In		Raptor Elementary	Principal's Office	Fix Plumbling

Currently Signed In Contractors

Use the **Currently Signed In** tab to view all contractors who are currently signed in. You can also perform the following tasks from this workspace.



View Currently Signed In Contractor Information

View the contractors who are currently signed in, their photo, sign-in date and time, destination/reason for the visit, company they represent, and any notes associated with the contractor.

Modify Destination/Notes

Modify where the contractor is in the building or the reason for the visit, and any notes associated with the visit:

1. In the **Options** column, click the icon and select a new **Destination** from the drop-down list or enter it in the text field.
2. Click the icon to save your changes. If you want to cancel your changes, click the icon.

> **Note** If you change the Destination of a contractor, they will be signed out and then immediately signed in with the new destination. This information will display in the Sign In/Sign Out history for the contractor.

Print or Reprint Badge

If a contractor has lost their badge or changed their destination, or the printer has malfunctioned, you can reprint their badge.

In the **Options** column, click the icon to print or reprint the contractor's badge.

Sign Out Contractors

You can sign out a single contractor or multiple contractors.

- To sign out a single contractor, click **Sign Out** next to the contractor's name.
- To sign out multiple contractors, select the **Enable Multi-Sign-Out** check box in the upper right corner, select the check box next to all the contractors to be signed out, and then click **Sign Out**.

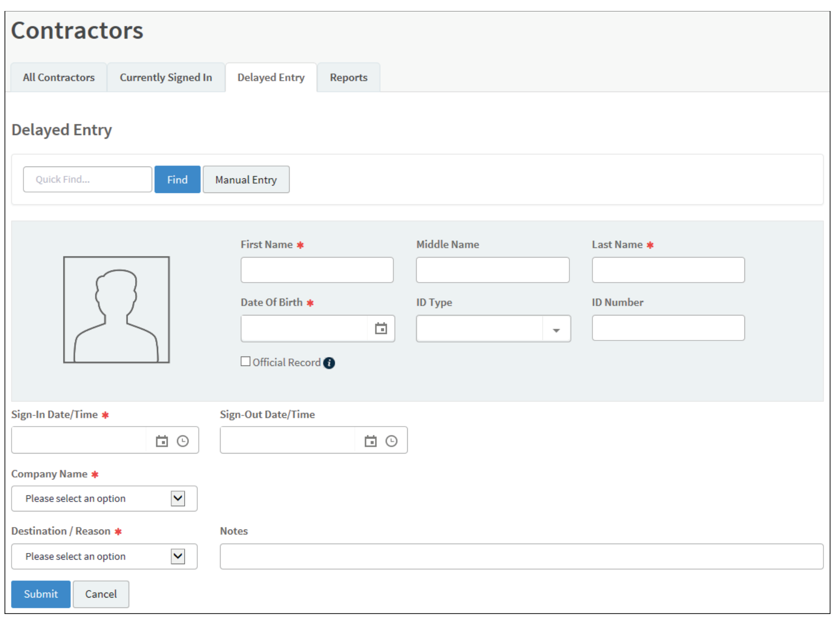
  To return to single sign-out mode, clear the **Enable Multi-Sign-Out** check box.

Delayed Sign In and Sign Out

> **Note** This feature is not visible at the All Buildings level.

If you are unable to sign in or sign out due to equipment issues or internet connection issues, you can use the **Delayed Entry** feature to manually enter the sign-in and sign-out date and time. This feature allows users to record the actual sign-in and sign-out times but the entry is delayed until the system is available.

1. Select the school from the Building Selector (you must select a specific building to use the delay entry feature).
2. From the navigation menu, select **Modules > Contractors** and then click the **Delayed Entry** tab.



3. If the person has previously been scanned into Raptor, enter their **First Name** or **Last Name** in the text field, click **Find** and then select the person from the search results.
4. If the person has not previously been entered in Raptor, click **Manual Entry** and enter the following required information on the **Delayed Entry** workspace:
   - **First Name**
   - **Last Name**
   - **Date of Birth** – Click the icon and select the date and year.
   - **Sign-In Date/Time** – Click the icon to select the date and then click the icon to select the time that the person signed in.
   - **Sign-Out Date/Time** – If the system was still down when the person signed out, click the icon to select the date and then click the icon to select the time that the person signed out.
   - **Company Name** – From the drop-down list, select the name of the company who employs the contractor.
   - **Destination/Reason** – Specify where the person is going in the building or the reason for the visit. You can select a pre-defined destination/reason from the drop-down list or enter another destination/reason in the text field.

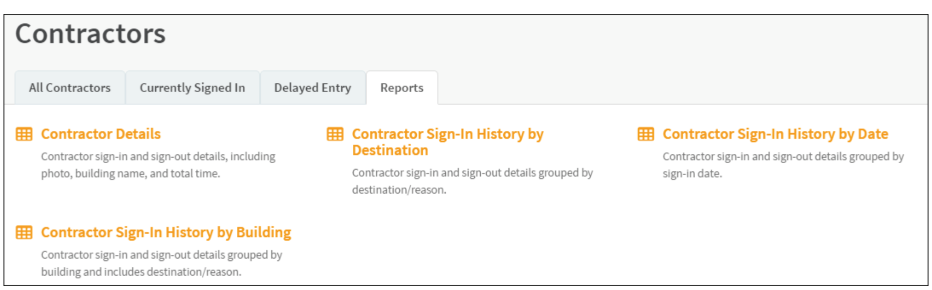
> **Note** If you manually enter the person's information, their information will not be found using the **Find** feature on future visits until their ID has been scanned into Raptor.

5. Click **Submit**.

   A Delayed Entry Successful message displays in the lower right corner of the screen.

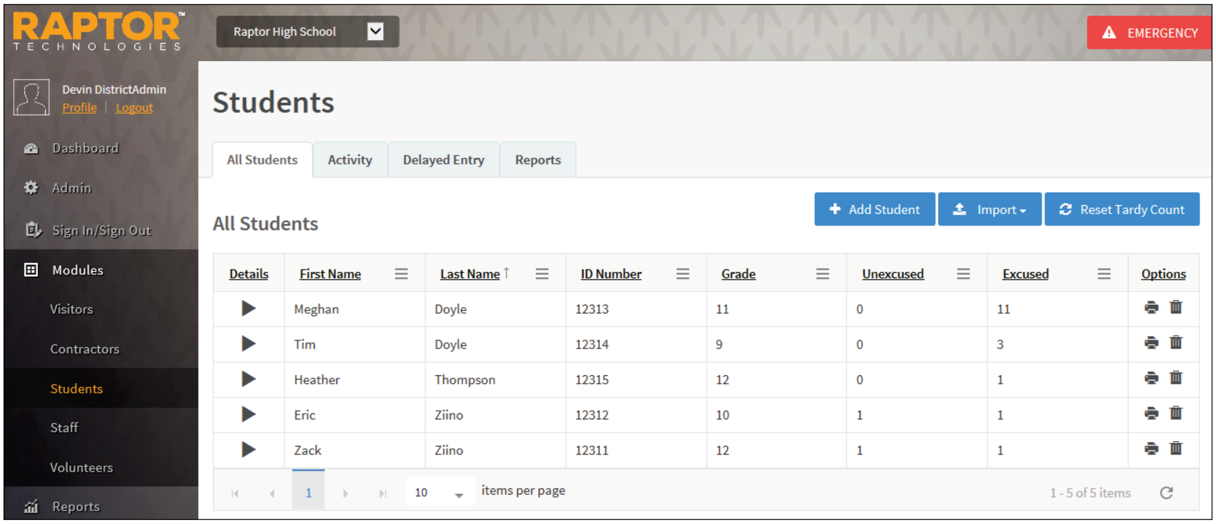
Contractor Reports

Use the **Reports** tab to access and run any of the available contractor reports. See Contractor Reports.

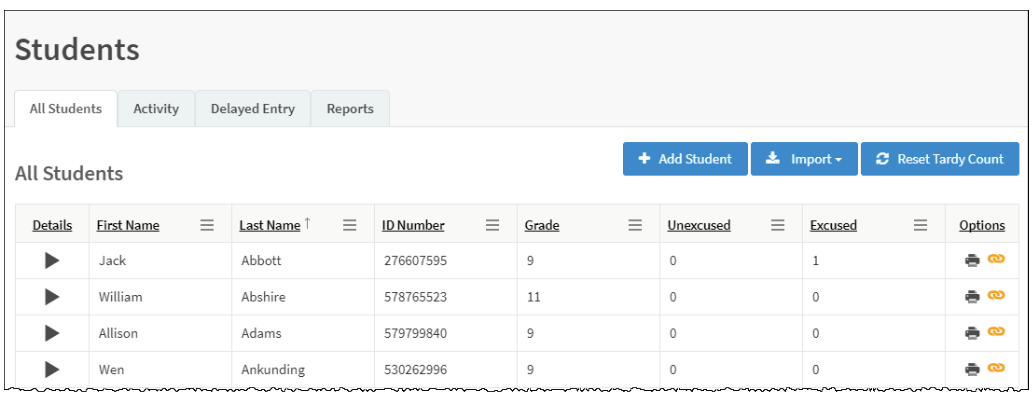


Managing Students

You can manage the students in your building using the **Students** workspace. Select **Modules > Students** in the navigation menu and then click the tab in the **Students** workspace for the tasks you want to perform.



If you have Raptor Link enabled, the Options column on the **All Students** workspace displays the **Raptor Link** icon instead of the **Delete** icon.



All Students

Users can use the **All Students** tab to view a list of students for the selected building. From this workspace, you can also:

- Print Temporary IDs
- Reset Tardy Count*
- View Student Details

- Enable/Disable Student Self Sign-Out*
- View Tardy and Temporary ID Count
- View Guardians
- Add, Modify and Delete Guardians* – *For guardian records that were added by Raptor Link, you can only modify non-Raptor Link fields.*
- Add, Modify and Delete Students* – *You can only add and delete students for buildings **not** controlled by Raptor Link. You can only modify non-Raptor Link fields.*
- Import Students, Student Photos and Guardians* – *You can only import student records for buildings **not** controlled by Raptor Link, or import non-Raptor Link fields for students already in the system.*

*Admin permissions are required

Print Temporary ID

Click the icon in the **Options** column to print a temporary ID badge for the student.

Reset Tardy Count

Click the **Reset Tardy Count** button to reset the tardy count to zero (0) for all students.

> **Note** Tardy count can be reset at the district level, building level, or individual student level.

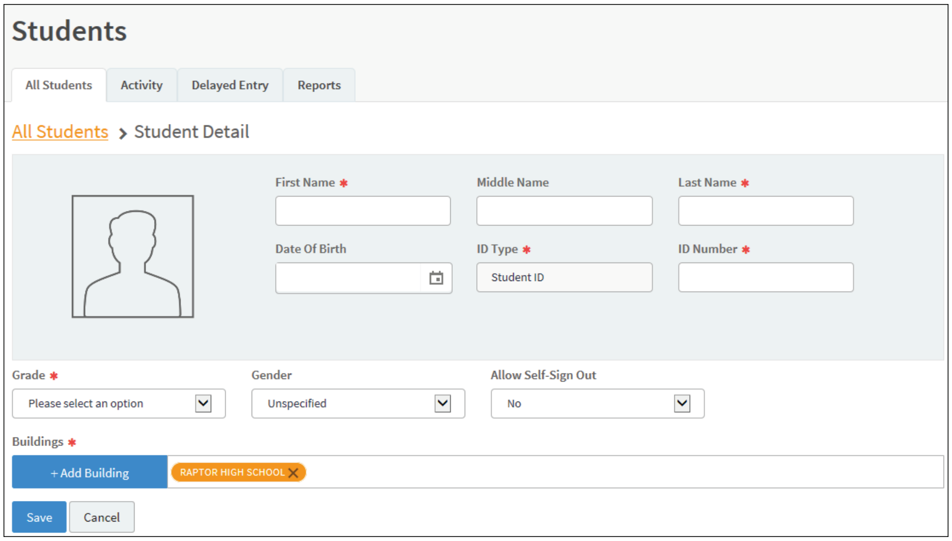
Add Students

> **Note** This feature is only available for buildings that are ***not*** controlled by Raptor Link.

You can add students one at a time (manually) or import all student information using the import utility. Typically, at the beginning of the school year, all students will be imported to simplify the process. See Import Students.

Perform the following steps to manually add a student:

1. In the navigation menu, select **Modules > Students**.
2. From the Building selector, select the school the student attends.
3. On the **All Students** workspace, click **Add Student**.



4. Enter the following information. Required fields are indicated with an asterisk (*).
   - **First Name*** – Enter the student's first name.
   - **Middle Name** – Optionally enter the student's middle name.
   - **Last Name*** – Enter the student's last name.
   - **Date of Birth** – Click the icon and select the student's date of birth from the calendar.
   - **ID Type*** – This field is set to Student ID and cannot be changed.
   - **ID Number*** – Enter the number that is on the ID Type.

     > **Note** If the 1D barcode reader is used for student sign-in and sign-out on the Kiosk, the barcode ID is referenced from the ID Number field (normally, the student's ID Number is the same as the 1D barcode on their student ID card). ID numbers must be unique.

   - **Grade*** – Select the grade level for the student from the drop-down list.
   - **Gender** – Optionally, select the student's gender (for future identification purposes).
   - **Allow Self Sign Out** – Select **Yes** or **No** from the drop-down list to indicate whether the student can sign themselves out of the building.
5. In the **Buildings** area, the currently selected school should be displayed. To add additional schools (buildings) the student may attend, click **Add Building** and select the building name from the drop-down list.
6. Click **Save**.

Import Students

The Import Students utility enables you to import a list of students into the Raptor system. It also includes the ability for unattended import of students by creating a manifest file that includes information about the field mapping and file to be imported.

Notes

- You can only import student data for buildings that are ***not*** controlled by Raptor Link.
- The Raptor Link fields, indicated by , ***cannot*** be imported into buildings controlled by Raptor Link. Only non-Raptor Link fields can be imported.
- To use this feature, you must first create an Excel spreadsheet or comma delimited file that contains the required information.
- The use of special characters in an Excel formatted import file may cause unexpected results.

The file can contain the following Student information to be imported:

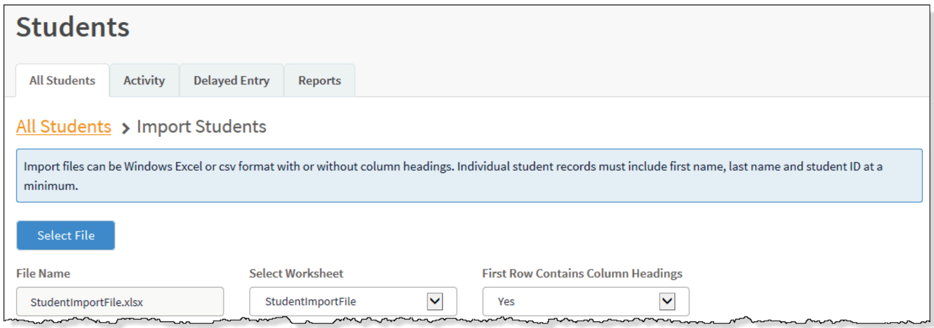
- First Name*
- Middle Name
- Last Name*
- Date of Birth
- ID Number*
- Gender
- Grade
- Building Name
- Allow Self-Sign Out (True/False) – If this field is not mapped during the import, the default is set to False.
- Allergy Notes, Medical Condition Notes
- Physician Name, Physician Phone
- Preferred Hospital
- Custom Profile Fields

*Indicates required information.

Perform the following steps to import a list of students into Raptor:

1. In the navigation menu, select **Modules > Students**.
2. From the Building Selector, select the building where the student information will be imported.

3. On the **All Students** workspace, click **Import** and select **Import Students** from the drop-down list.
4. Click **Select File** and navigate to the location where the file is saved on your computer.
5. Select the **Excel** or **CSV** file and click **Open**.



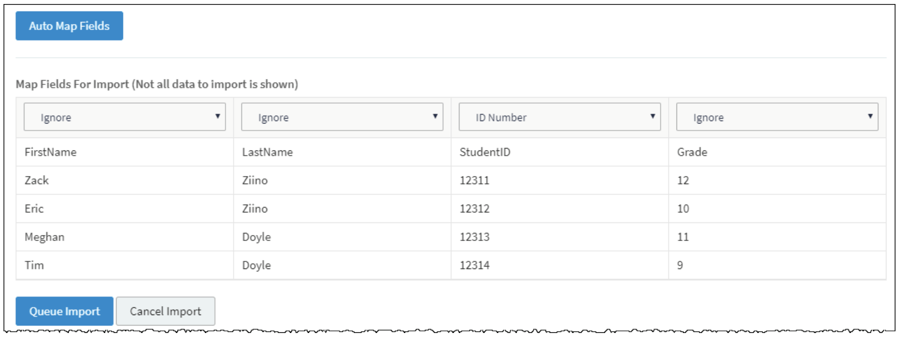
6. If you used Excel and the file contains multiple worksheets, select the worksheet that contains the student information from the **Select Worksheet** drop-down list.
7. If the first row of the worksheet contains column headings, select **Yes** from the **First Row Contains Column Headings** drop-down list and this row will not be imported. Otherwise, select **No**.
8. Click **Auto Map Fields** to automatically map the column headings in the file to the mapping names in Raptor. The names must be identical.

   You can also manually map each of the columns to be imported by selecting the appropriate fields in the drop-down menu above each column that displays.

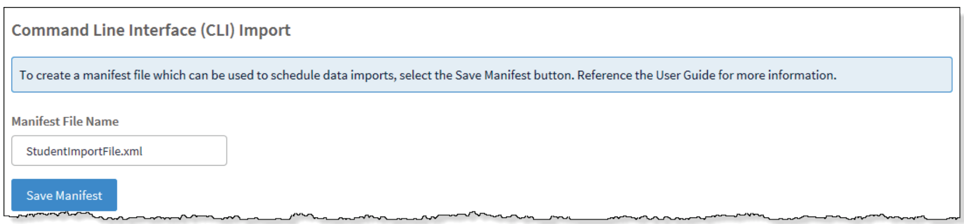
   For non-Raptor Link controlled buildings, **First Name**, **Last Name**, and **ID Number** are required columns. For Raptor Link controlled buildings, only the ID Number, Self-Sign Out and medical fields can be mapped.

   Notes

   - Although **Grade** is not a required column, if the user does not map this column, it will be set to **Not Specified** by default.
   - If you are importing students at the All Buildings level, the **Building Name** field can be mapped to associate the student to a building.
   - The columns with **Ignore** selected will not be imported.



9. If you want to create a manifest file to schedule automatic imports, click **Save Manifest** and save the file. You can then schedule the imports using a scheduling utility. See Using Manifest Import.



10. Click **Queue Import**.

    A message displays in the lower right corner of the screen stating that the import job was successfully added to the import queue for processing.

    When the import has completed processing, an email will be sent to the email address of the user indicating the number of records successfully imported and any error that may have occurred.

Import Student Photos

You can import photos of students to display in their student detail information. You can import a single student photo or multiple student photos.

> **Note** To use this feature, you must first create a compressed zip file that contains the student photos you want to import.

- The student photos should be approximately 640 x 480 pixels (H x W) and saved as a .jpg file.
- The file name should be the student's ID number (for example, 1234567.jpg).
- Student photo files must be in a compressed zip format.

Perform the following steps to import student photos:

1. In the navigation menu, select **Modules > Students** and then click the **All Students** tab.
2. From the Building Selector, select the building where the student information will be imported.
3. On the **All Students** workspace, click **Import > Student Photos**.
4. Click **Select Files**.
5. Navigate to the zipped file, select it and click **Open**.
6. If you want to create a manifest file to schedule automatic imports, click **Save Manifest** and save the file. You can then schedule the imports using a scheduling utility. See Using Manifest Import.
7. Click **Queue Import**.

   A message displays in the lower right corner of the screen stating that the import job was successfully added to the import queue for processing.

   When the import has completed processing, an email will be sent to the email address of the user indicating the number of photos successfully imported and any error that may have occurred.

Import Student Residences REU

The Import utility enables you to import student residence information if you have the Raptor Reunification System enabled.

> **Notes**
>
> - If Raptor Link is enabled, you can only import **Secondary** type student residence information. The information will be displayed in the **Residences** grid on the **Student Detail** workspace as **Secondary** type.
> - To use this feature, you must first create an Excel spreadsheet or comma delimited file that contains the required information.

The file can contain the following student residence information to be imported:

- Student ID Number*
- Type* - (Acceptable fields include Primary, Secondary, P, S)
- Address 1*
- Address 2/Address 3
- City*
- State*
- Zip Code*

- Country

*Indicates required information.

Perform the following steps to import student residence information into Raptor:

1. In the navigation menu, select **Modules > Students** and then click the **All Students** tab.
2. From the Building Selector, select the building where the student residence information will be imported.
3. On the **All Students** workspace, click **Import** and select **Student Residences** from the drop-down list.
4. Click **Select File** and navigate to the location where the file is saved on your computer.
5. Select the file and click **Open**.
6. If you used Excel and the file contains multiple worksheets, select the worksheet that contains the student residence information from the **Select Worksheet** drop-down list.
7. If the first row of the worksheet contains column headings, select **Yes** from the **First Row Contains Column Headings** drop-down list. Otherwise, select **No**.
8. Click **Auto Map Fields** to automatically map the column headings in the file to the mapping names in Raptor. The names must be identical.

   You can also manually map each of the columns to be imported by selecting the appropriate fields in the drop-down menu above each column that displays.

   The Student ID, Type, Address 1, City, State and Zip Code are required columns.

   > **Note** The columns with **Ignore** selected with not be imported.

9. If you want to create a manifest file to schedule automatic imports, click **Save Manifest** and save the file. You can then schedule the imports using a scheduling utility. See Using Manifest Import.
10. Click **Queue Import**.

    A message displays in the lower right corner of the screen stating that the import job was successfully added to the import queue for processing.

    When the import has completed processing, an email will be sent to the email address of the user indicating the number of records successfully imported and any error that may have occurred.

Import Guardians

The Import utility enables you to import a list of guardians and associate them with the students that have already been entered in Raptor.

Notes

- To use this feature, you must first create an Excel spreadsheet or comma delimited file that contains the required information.
- If Raptor Link is enabled, guardian record fields created by Raptor Link ***cannot*** be modified or deleted using the import process or manually by a user. Raptor Link controlled fields are displayed as read-only; these fields are indicated below by in the list below.
- If you are importing a guardian record that matches a Raptor Link controlled record, only non-Raptor Link controlled fields will be updated.
- Although importing non-Raptor Link controlled fields into a Raptor Link controlled guardian record is allowed, the student ID, guardian's first name, last name, and established third criteria field must be provided in the import and match an existing record. Otherwise, a new guardian record will be created.

The file can contain the following Guardian information to be imported:

- First Name*
- Middle Name
- Last Name*
- Date of Birth* – This field must be mapped if it is set as matching criteria in the Student Management Settings.
- ID Number*
- Relationship
- Primary Email – This field must be mapped if it is set as matching criteria in the Student Management Settings.
- Phone Number* – This field must be mapped if it is set as matching criteria in the Student Management Settings.
- Preferred Contact Method REU
- Mobile Phone REU
- Office Phone REU
- Home Phone REU
- Secondary Email REU

*Indicates required information.

> **IMPORTANT!**
>
> If the guardian is associated with multiple students (has more than one child in a school), it is important that the import file also includes the guardian's **Date of Birth** or other criteria to avoid having duplicate records created for the guardian during the import process (see Guardian Match Criteria for Import). A row containing the guardian information must be created for each student.

Perform the following steps to import a list of guardians into Raptor:

1. In the navigation menu, select **Modules > Students**.
2. From the Building Selector, select the building where the guardian information will be imported.
3. On the **All Students** workspace, click **Import** and select **Guardians** from the drop-down list.
4. Click **Select File** and navigate to the location where the file is saved on your computer.
5. Select the file and click **Open**.
6. If you used Excel and the file contains multiple worksheets, select the worksheet that contains the guardian information from the **Select Worksheet** drop-down list.
7. If the first row of the worksheet contains column headings, select **Yes** from the **First Row Contains Column Headings** drop-down list. Otherwise, select **No**.
8. Click **Auto Map Fields** to automatically map the column headings in the file to the mapping names in Raptor. The names must be identical.

   You can also manually map each of the columns to be imported by selecting the appropriate fields in the drop-down menu above each column that displays.

   The **First Name**, **Last Name**, and **Student ID** are required columns, and the column specified as matching criteria in the **Student Management Settings**. It is highly recommended that you also map the **Date of Birth** column.

   > **Note** The columns with **Ignore** selected with not be imported.

9. If you want to create a manifest file to schedule automatic imports, click **Save Manifest** and save the file. You can then schedule the imports using a scheduling utility. See Using Manifest Import.
10. Click **Queue Import**.

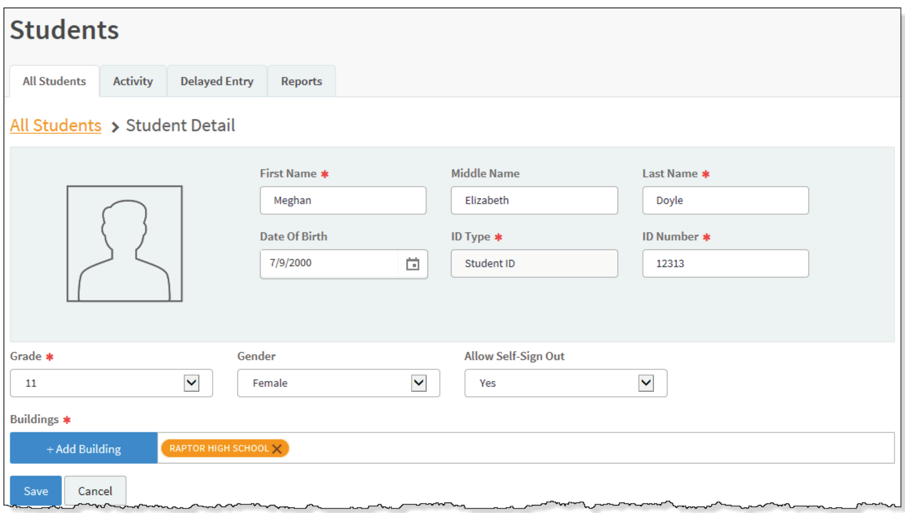
A message displays in the lower right corner of the screen stating that the import job was successfully added to the import queue for processing.

When the import has completed processing, an email will be sent to the email address of the user indicating the number of records successfully imported and any error that may have occurred.

View and Modify Student Details

To view the details about a specific student:

1. In the navigation menu, select **Modules > Students**.
2. From the Building Selector, select the school the student attends.
3. On the **All Students** workspace, click the ▶ icon next to the student's name to expand the **Student Detail** and view the information in the student record.



4. If the student record is ***not*** controlled by Raptor Link, you can modify any of the following information in the student record (asterisk * indicates a required field).

   If the student record ***is*** controlled by Raptor Link, the fields designated with 🔗 are Raptor Link fields and ***cannot*** be modified.

   - **First Name*** 🔗
   - **Middle Name** 🔗
   - **Last Name*** 🔗
   - **Date of Birth** 🔗
   - **ID Type*** 🔗 This field is set to Student ID and cannot be changed.

- **ID Number*** – The identification number associated with the ID Type.
- **Grade*** – The grade the student is currently in.
- **Gender** – The student's gender. Select **Female**, **Male** or **Unspecified**.
- **Allow Self-Sign Out** – Select **True** or **False** from the **Allow Self Sign-Out** drop-down list to indicate whether the student can sign out without a guardian being present using the Kiosk or Front Desk.

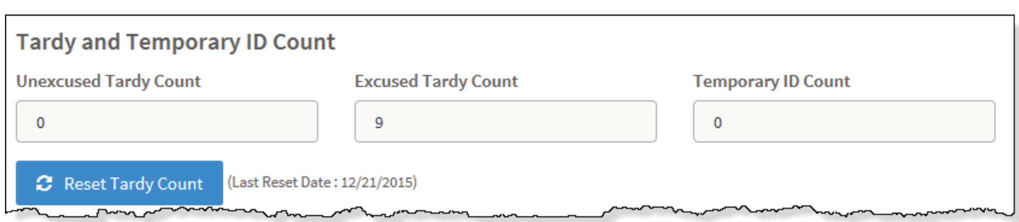
  > **Note** If the student information was imported and this value was not specified, it defaults to False.

- **Buildings*** – The buildings where the student may sign in and sign out.
- **Allergy Notes** REU
- **Medical Condition Notes** REU
- **Medication Notes** REU
- **Physician Name** REU
- **Physician Phone** REU
- **Preferred Hospital** REU

5. Click **Save** to update the record.

View Tardy and Temporary ID Count

In the **Tardy and Temporary ID Count** area on the **Student Detail** workspace, users can view the number of times the student has been tardy (unexcused or excused), and the number of temporary IDs that have been issued to the student since the last reset.



Reset Tardy Count

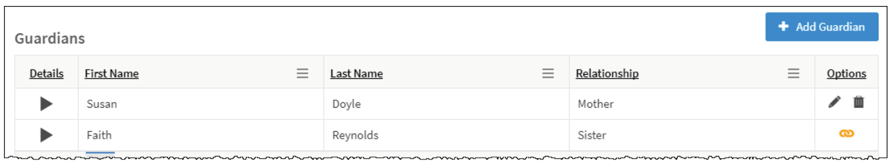
Click the **Reset Tardy Count** button to reset the tardy count to zero (0) for the selected students.

> **Note** Tardy count can also be reset at the district level and building level (see **All Students > Reset Tardy Count**).

View Guardian Information

Use the **Guardians** area on the **Student Detail** workspace to view the details for the guardian who is approved to sign out the selected student, and to modify the guardian information or add a guardian.

> **Note** You can also import guardians from the **All Students** workspace (**Import > Guardians**).

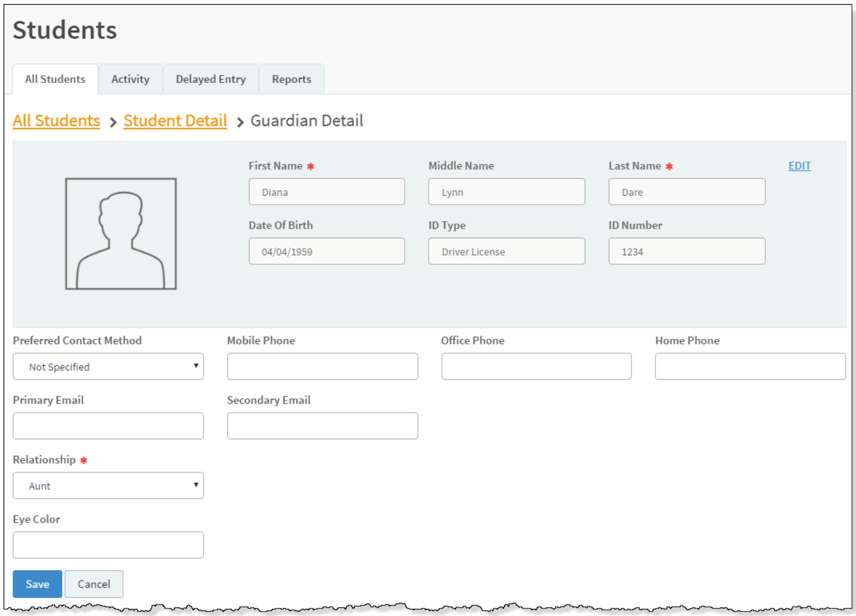


Click the ▶ icon next to the guardian's name to expand the **Guardian Detail**.

Add Guardian

Perform the following steps to add a guardian for the student:

1. In the navigation menu, select **Modules > Students**.
2. From the Building Selector, select the school the student attends.
3. On the **All Students** workspace, click the ▶ icon next to the student's name to expand the **Student Detail**.
4. In the **Guardians** area, click **Add Guardian**.
5. Use one of the following methods to enter the guardian's information into Raptor:
   - Click **Scan** to scan the guardian's ID and enter the information into the system.
   - For guardians who have been previously scanned into the system, enter their name and click **Find**.
   - Click **Manual Entry** and enter the information on the guardian form.



If you are using manual entry, enter the following information. Required fields are indicated with an asterisk (*).

- **First Name*** – Enter the guardian's first name.
- **Middle Name** – Optionally enter the guardian's middle name.
- **Last Name*** – Enter the guardian's last name.
- **Date of Birth** – Click the icon and select the guardian's date of birth from the calendar.
- **ID Type** – Select the type of government-issued identification used (Driver License or Passport).
- **ID Number** – Enter the number that is on the ID Type.
- **Preferred Contact Method** REU – Select the preferred method for contacting the guardian from the drop-down list (Email, Text Message or Not Specified).
- **Mobile Phone** REU – Enter the guardian's mobile phone number. This field is required if text message is selected as the preferred contact method.
- **Office Phone** REU – Enter the guardian's office phone number.
- **Home Phone** REU – Enter the guardian's home phone number.
- **Primary Email** REU – Enter the guardian's primary email address. This field is required if email is selected as the preferred contact method.
- **Secondary Email** REU – Optionally, enter the guardian's secondary email address.

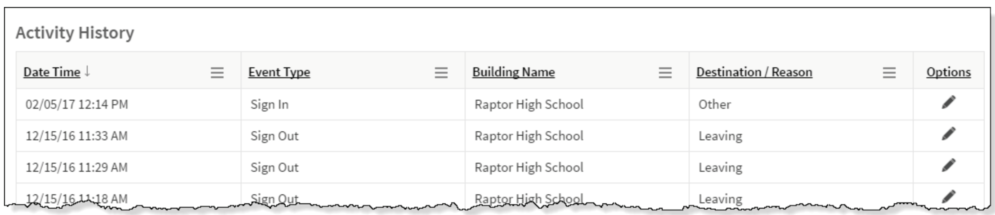
- **Relationship*** – Select how the guardian is related to the student from the drop-down list.

6. Click **Save**.

View Student Activity History

Use the **Activity History** area on the **Student Detail** workspace to view details for all sign in events, sign out events, and temporary IDs created for the student.

By default, the Date/Time, Event Type, Building Name and Destination/Reason columns display. From the column menu, you can also select to display the Event Method and Notes columns.



Modify Student Activity History

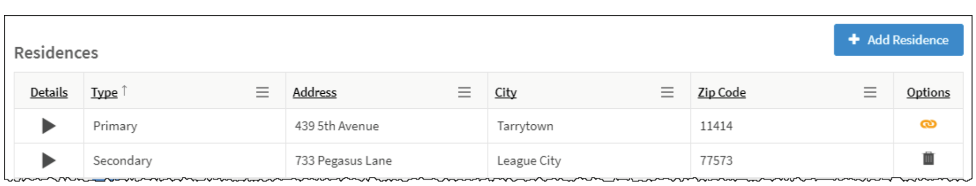
Users with the *Can Manage Students* permission can modify the **Destination/Reason** for a student sign-in or sign-out event.

1. In the **Activity History** grid on the **Student Detail** workspace, click the icon.
2. In the **Destination/Reason** column, select a new destination/reason from the drop-down list.
3. Click the icon to save the new destination/reason. If you want to cancel the action, click the icon.

View Student Residences REU

Use the **Residences** area on the **Student Detail** workspace to view the student's primary and secondary residence information.

If Raptor Link is enabled, the primary residence information is read-only and cannot be changed.



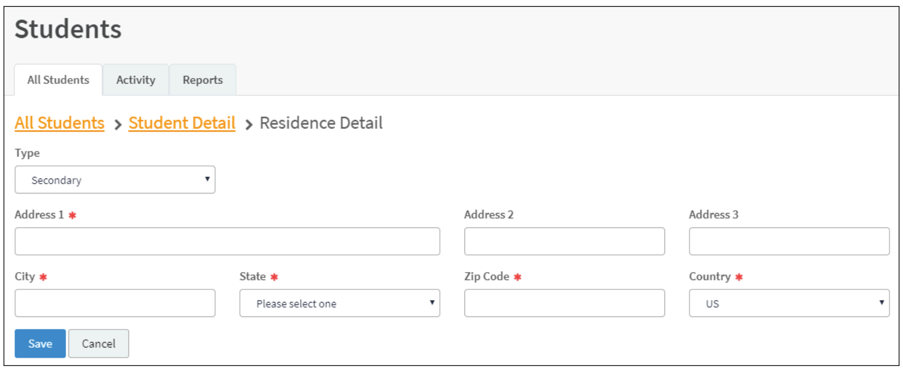
Add Student Residence REU

Users with the *Can Manage Students* permission can add student residence information as follows:

- If Raptor Link is enabled, only the secondary residence information can be added.
- If Raptor Link is ***not*** enabled, users can add the primary and secondary residence information.

Perform the following steps to add the residence information:

1. In the **Residences** area on the **Student Detail** workspace, click **Add Residence**.



2. If Raptor Link is not enabled, select Primary or Secondary from the Type drop-down list.

   If Raptor Link is enabled, Secondary type is automatically selected.

3. Enter the address information and then click **Save**.

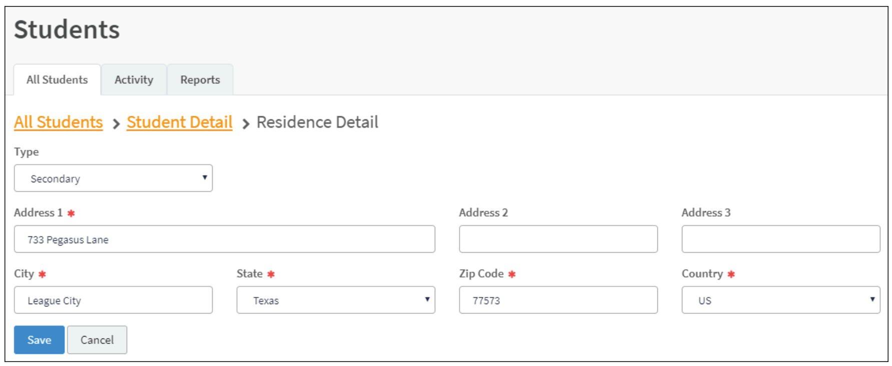
Modify Student Residences REU

Users with the *Can Manage Students* permission can modify the residence information as follows:

- If Raptor Link is enabled, only the secondary residence information can be modified.
- If Raptor Link is ***not*** enabled, users can modify the primary and secondary residence information.

Perform the following steps to modify the residence information:

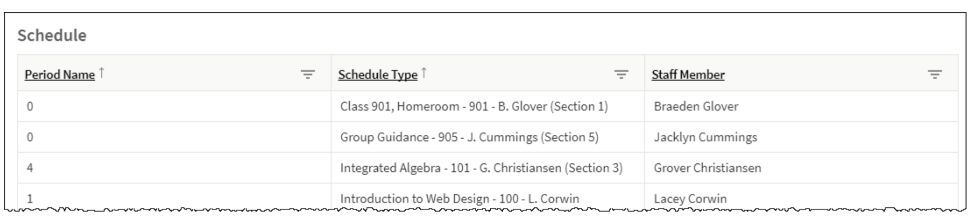
1. In the **Residences** grid on the **Student Detail** workspace, click the ▶ icon.



2. Modify any of the information and then click **Save**.

View Student Schedules REU

Use the **Schedule** area on the **Student Detail** workspace to view the student's class schedule, including Period Name, Schedule Type, and the Staff Member assigned to the class.

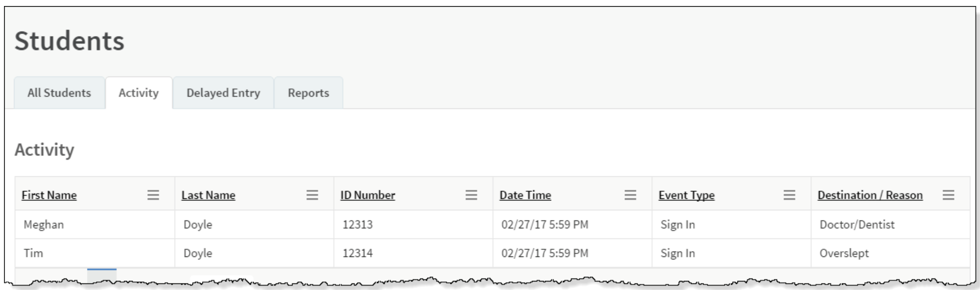

Schedule

Period Name	Schedule Type	Staff Member
0	Class 901, Homeroom - 901 - B. Glover (Section 1)	Braeden Glover
0	Group Guidance - 905 - J. Cummings (Section 5)	Jacklyn Cummings
4	Integrated Algebra - 101 - G. Christiansen (Section 3)	Grover Christiansen
1	Introduction to Web Design - 100 - L. Corwin	Lacey Corwin

Activity

Use the **Activity** tab to view student sign in and sign out activity for the current day, such as the name of the student and their ID number, the time they signed in/signed out, when a temporary ID is created, destination/reason (for sign in/sign out), method for sign in/sign out, and guardian name.

> **Note** The Event Method and Guardian Name are hidden by default.

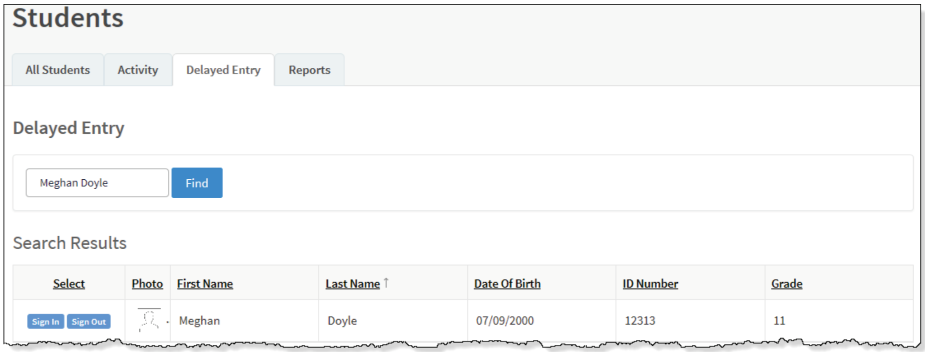


Delayed Sign In and Sign Out

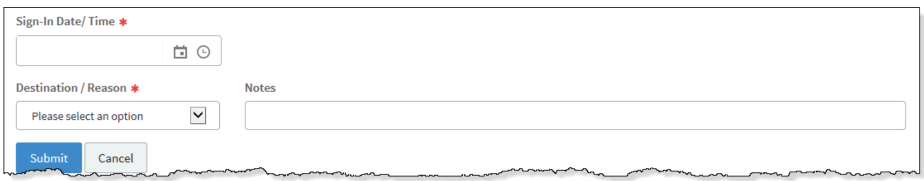
> **Note** This feature is not visible at the All Buildings level.

If you are unable to sign in or sign out due to equipment issues or internet connection issues, you can use the **Delayed Entry** feature to manually enter the sign-in or sign-out date and time. This feature allows users with the *Can Sign In Students* permission to record the actual sign-in or sign-out times but the entry is delayed until the system is available.

1. Select the school from the Building selector (you must select a specific building to use the delay entry feature).
2. From the navigation menu, select **Modules > Students** and then click the **Delayed Entry** tab.
3. Enter the student's **First Name** and/or **Last Name** in the text field, click **Find**.



4. Select **Sign In** or **Sign Out** next to the student's name.

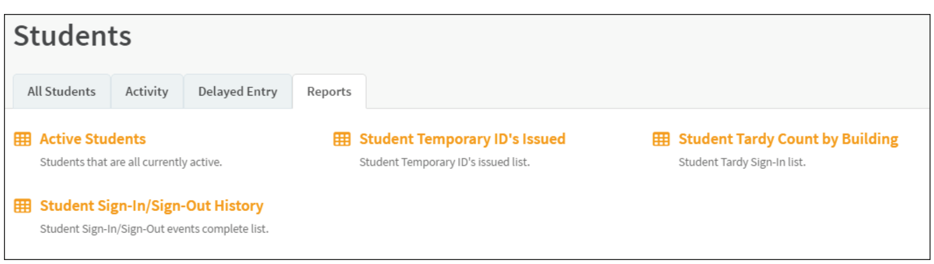


5. Complete the following information:
   - **Sign-In/Sign-Out Date/Time** – Click the icon to select the date and then click the icon to select the time that the student actually signed in or signed out.
   - **Destination/Reason** – From the drop-down list, select the reason the student is signing in or signing out.
6. Click **Submit**.

   A *Delayed Entry Successful* message displays in the lower right corner of the screen.

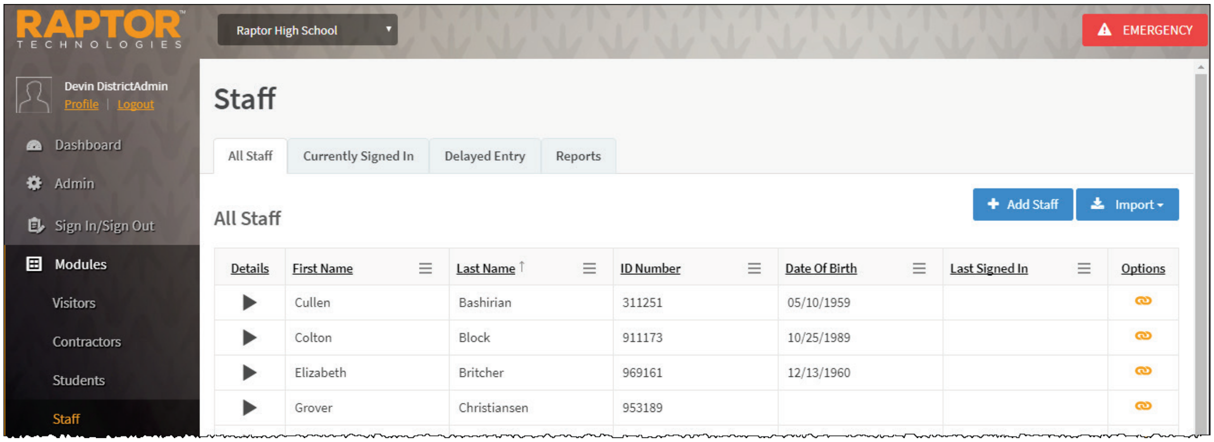
Student Reports

Use the **Reports** tab to access and run any of the available student reports. See Student Reports.



Managing Staff

You can manage the staff using the **Staff** workspace. Select **Modules > Staff** in the navigation menu and then click the tab for the tasks you want to perform.



If you have Raptor Link enabled, the **Options** column on the **All Staff** workspace displays the **Raptor Link** icon instead of the **Delete** icon for records that are controlled by Raptor Link.

All Staff

Administrators with the *Can Manage Staff* permission can use the **All Staff** tab to view a list of all staff members or those for a selected building. From this workspace, you can also:

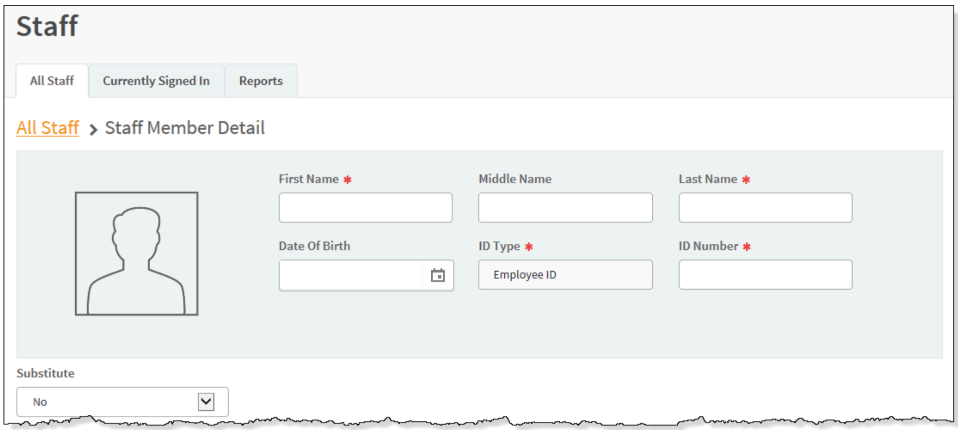
- Add Staff Members
- Import Staff
- Import Staff Photos
- Import Emergency Contacts REU
- Import Rosters REU
- Delete Staff Members
- View and Modify Staff Details
- Manually Create Users for Reunification App REU

Add Staff

You can add staff one at a time (manually) or import all staff information using the import utility (see Import Staff).

Perform the following steps to manually add a staff member:

1. In the navigation menu, select **Modules > Staff**.
2. From the Building selector, select **All Buildings** or a specific school.
3. On the **All Staff** workspace, click **Add Staff**.



4. Enter the following information. Required fields are indicated with an asterisk (*).
   - **First Name*** – Enter the staff member's first name.
   - **Middle Name** – Optionally enter the staff member's middle name.
   - **Last Name*** – Enter the staff member's last name.
   - **Date of Birth** – Click the icon and select the staff's date of birth from the calendar.
   - **ID Type*** – This field is *read only* and is set to Employee ID.
   - **ID Number*** – Enter the number that is on the Employee ID.

> **Note** If the 1D barcode reader is used for staff sign-in and sign-out on the Kiosk, the barcode ID is referenced from the ID Number field (the staff member's ID Number is the same as the 1D barcode on their staff ID card). The ID number must be unique.

- **Preferred Contact Method** REU – Select the preferred method of contact from the drop-down list.
- **Mobile/Office/Home Phone** REU – If phone is selected as the preferred method of contact, enter the phone number in the appropriate field.
- **Email** REU – If email is selected as the preferred method of contact, enter the email address. If you want to create a Reunification mobile app user, the email address to log in is required in this field (school email).

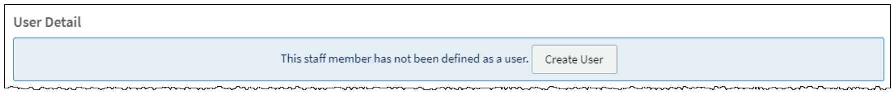
> **Note** The email address to be used by the staff member for their user account cannot be used for a Volunteer Portal user account.

5. From the **Substitute** drop-down list, select **Yes** or **No** to indicate whether the staff member is a substitute teacher.
6. In the **Primary Building(s)** field, click **Add Building** and select the building the staff member is associated with. The user can select one, multiple or no buildings.

> **Note** This field must include all buildings the staff member is associated with to use the Reunification mobile app for an incident initiated at the building.

7. Select their **Department** from the drop-down list.
8. Select the **Type** of staff member from the drop-down list.

9. Click **Save**.
10. If the Reunification[REU] module is enabled, after you save the staff information, you can access the **Staff Detail** workspace and create a user account if the staff record has an email address or link to an existing user account.



In the **User Detail** area, click **Create User**. See Managing Users/Contacts (Admin) for instructions on creating user accounts.

Import Staff

The Import Staff utility enables Administrators with the *Can Import Staff* permission to import a list of staff members into the Raptor system. It also includes the ability for unattended import of staff by creating a manifest file that includes information about the field mapping and file to be imported.

> **Notes**
> - You can only import staff data for buildings that are ***not*** controlled by Raptor Link.
> - The Raptor Link fields, indicated by , ***cannot*** be imported into buildings controlled by Raptor Link. Only non-Raptor Link fields can be imported.
> - When importing non-Raptor Link fields, the staff ID, first name and last name must be provided in the import and match an existing record. Otherwise, a new staff record will be created.
> - To use this feature, you must first create an Excel spreadsheet or comma delimited file that contains the required information.
> - The use of special characters in an Excel formatted import file may cause unexpected results.

The file can contain the following Staff information to be imported:

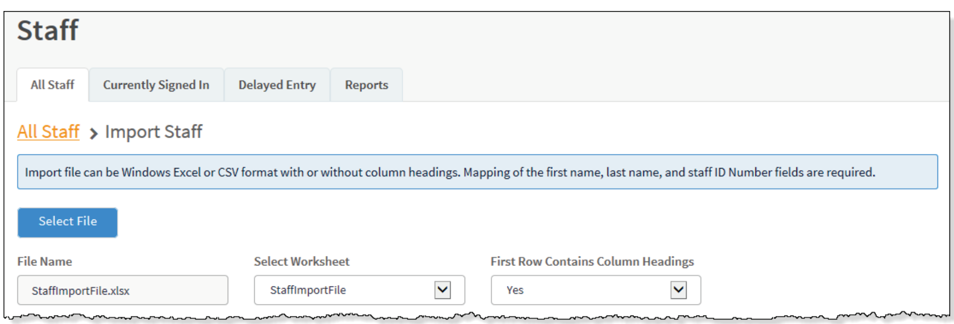
- First Name*
- Middle Name
- Last Name*
- Date of Birth
- ID Number*
- Substitute – If not imported, the value defaults to No.

- Preferred Contact Method REU
- Mobile Phone REU
- Office Phone REU
- Home Phone REU
- Email
- Primary Building -- Required field if performing the import at the client level (All Buildings)
- Department
- Type
- Create User – when this field is mapped, a user account with the Staff role will automatically be created or link to an existing user account.
- Custom Profile fields

*Indicates required information.

Perform the following steps to import staff information into Raptor:

1. In the navigation menu, select **Modules > Staff**.
2. From the Building selector, select **All Buildings** or a specific school.
3. On the **All Staff** workspace, click **Import Staff**.
4. Click **Select File** and navigate to the location where the file is saved on your computer.
5. Select the **Excel** or **CSV** file and click **Open**.

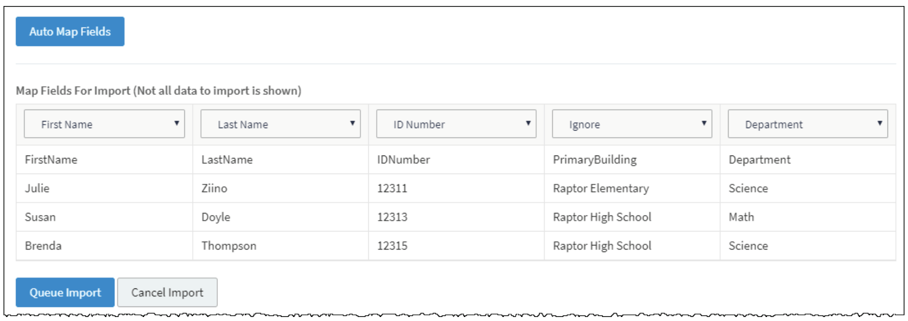


6. If you used Excel and the file contains multiple worksheets, select the worksheet that contains the staff information from the **Select Worksheet** drop-down list.
7. If the first row of the worksheet contains column headings, select **Yes** from the **First Row Contains Column Headings** drop-down list. Otherwise, select **No**.

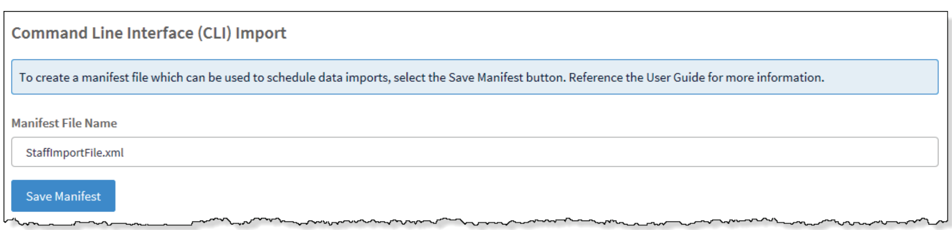
8. Click **Auto Map Fields** to automatically map the column headings in the file to the mapping names in Raptor. The names must be identical.

   You can also manually map each of the columns to be imported by selecting the appropriate fields in the drop-down menu above each column that displays. **First Name**, **Last Name**, and **ID Number** are required columns.

   > **Notes**
   >
   > - If you are importing staff at the All Buildings level, the **Building Name** field can be mapped to associate the staff member to a building.
   > - The columns with **Ignore** selected will not be imported.



9. If you want to create a manifest file to schedule automatic imports, click **Save Manifest** and save the file. You can then schedule the imports using a scheduling utility. See Using Manifest Import.



10. Click **Queue Import**.

    A message displays in the lower right corner of the screen stating that the import job was successfully added to the import queue for processing.

    When the import has completed processing, an email will be sent to the email address of the user indicating the number of records successfully imported and any error that may have occurred.

Import Staff Photos

You can import photos of staff members to display in their staff detail information. You can import a single staff member’s photo or multiple staff photos.

> **Note** To use this feature, you must first create a compressed zip file that contains the staff photos you want to import.

- The staff photos should be approximately 640 x 480 pixels (H x W) and saved as a .jpg file.
- The file name should be the staff’s ID number (for example, 1234567.jpg).
- Staff photo files must be in a compressed zip format.

Perform the following steps to import staff photos:

1. In the navigation menu, select **Modules > Staff**.
2. From the Building selector, select **All Buildings** or a specific school.
3. On the **All Staff** workspace, click **Import > Staff Photos**.
4. Click **Select Files**.
5. Navigate to the zipped file, select it and click **Open**.
6. If you want to create a manifest file to schedule automatic imports, click **Save Manifest** and save the file. You can then schedule the imports using a scheduling utility. See Using Manifest Import.
7. Click **Queue Import**.

   A message displays in the lower right corner of the screen stating that the import job was successfully added to the import queue for processing.

   When the import has completed processing, an email will be sent to the email address of the user indicating the number of photos successfully imported and any error that may have occurred.

Import Staff Emergency Contacts REU

You can import emergency contact information for staff members if you have the Reunification Module enabled. This information displays on the **Staff Details** workspace.

Notes

- To use this feature, you must first create an Excel spreadsheet or comma delimited file that contains the required information.
- The use of special characters in an Excel formatted import file may cause unexpected results.

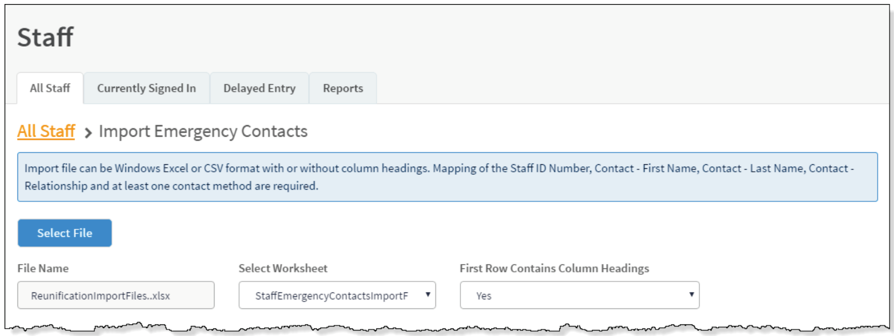
The file can contain the following information to be imported:

- Staff ID Number*
- Contact – First Name*
- Contact – Last Name*
- Contact – Relationship*
- Contact – Preferred Contact Method* (Email, Text Message, Not Specified)
- Contact – Mobile Phone (required if Text Message is Preferred Contact Method)
- Contact – Office Phone – If Office phone is preferred contact method.
- Contact – Home Phone – If Home phone is preferred contact method.
- Contact – Email (required if Email is Preferred Contact Method)

*Indicates required information.

Perform the following steps to import staff emergency contact information:

1. In the navigation menu, select **Modules > Staff**.
2. From the Building selector, select **All Buildings** or a specific school.
3. On the **All Staff** workspace, click **Import > Emergency Contacts**.
4. Click **Select File** and navigate to the location where the file is saved on your computer.
5. Select the **Excel** or **CSV** file and click **Open**.

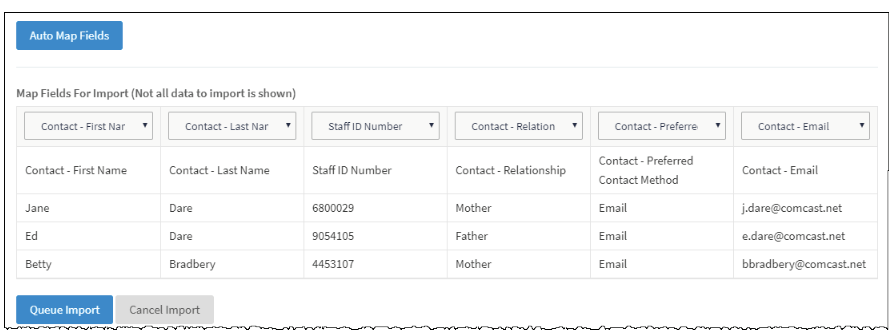


6. If you used Excel and the file contains multiple worksheets, select the worksheet that contains the staff information from the **Select Worksheet** drop-down list.
7. If the first row of the worksheet contains column headings, select **Yes** from the **First Row Contains Column Headings** drop-down list. Otherwise, select **No**.
8. Click **Auto Map Fields** to automatically map the column headings in the file to the mapping names in Raptor. The names must be identical.

   You can also manually map each of the columns to be imported by selecting the appropriate fields in the drop-down menu above each column that displays.

   Contact-First Name, **Contact-Last Name**, **Staff ID**, **Contact-Relationship**, **Contact-Preferred Contact Method**, and at least one **contact method** are required columns.

   > **Note** The columns with **Ignore** selected with not be imported.



9. If you want to create a manifest file to schedule automatic imports, click **Save Manifest** and save the file. You can then schedule the imports using a scheduling utility. See Using Manifest Import.

10. Click **Queue Import**.

    A message displays in the lower right corner of the screen stating that the import job was successfully added to the import queue for processing.

    When the import has completed processing, an email will be sent to the email address of the user indicating the number of records successfully imported and any error that may have occurred.

Import Rosters REU

Rosters are class schedules that are associated with a Staff member for a certain part of the day. In an emergency event, the staff member needs to be able to log into the Raptor Reunification mobile app and immediately pull up their student roster.

Users with the *Can Import Rosters* permission can use the import utility to import rosters (list of students).

> **Notes**
>
> - Rosters cannot be imported if the building is controlled by Raptor Link. The **Import > Rosters** menu item does not display.
> - Rosters can only be imported at the client level (All Buildings).
> - Roster import does not support updates; all imports purge existing data and create new data.
> - To use this feature, you must first create an Excel spreadsheet or comma delimited file that contains the required information. The file must also list the columns in the correct order.
> - The use of special characters in an Excel formatted import file may cause unexpected results.

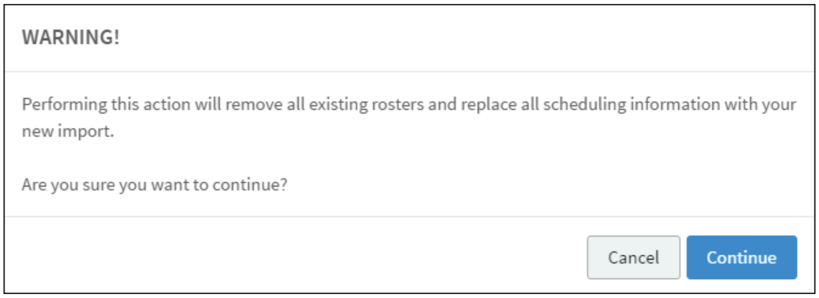
The file can contain the following information to be imported, and the required columns must be in the order listed:

- Student ID Number*
- Staff ID Number*
- Period*
- Schedule Type

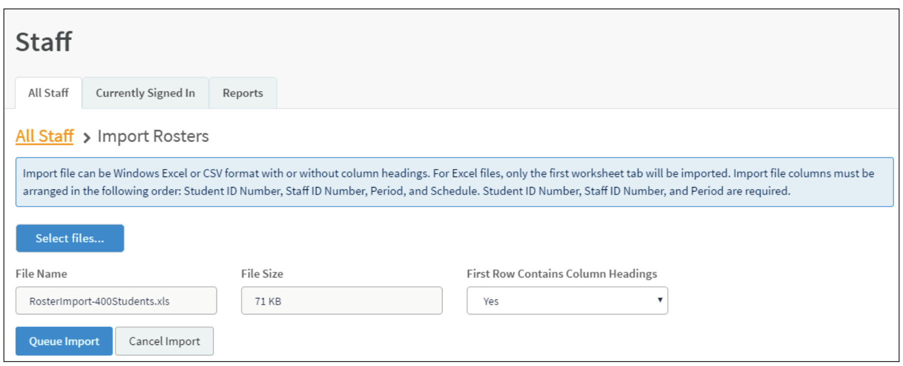
*Indicates required information.

Perform the following steps to import rosters:

1. In the navigation menu, select **Modules > Staff**.
2. From the Building selector, select **All Buildings**.
3. On the **All Staff** workspace, click **Import > Rosters**.



4. On the Warning dialog, click **Continue**.
5. Click **Select File** and navigate to the location where the file is saved on your computer.
6. Select the **Excel** or **CSV** file and click **Open**.



7. If the first row of the worksheet contains column headings, select **Yes** from the **First Row Contains Column Headings** drop-down list. Otherwise, select **No**.
8. Click **Queue Import**.

   A message displays in the lower right corner of the screen stating that the import job was successfully added to the import queue for processing.

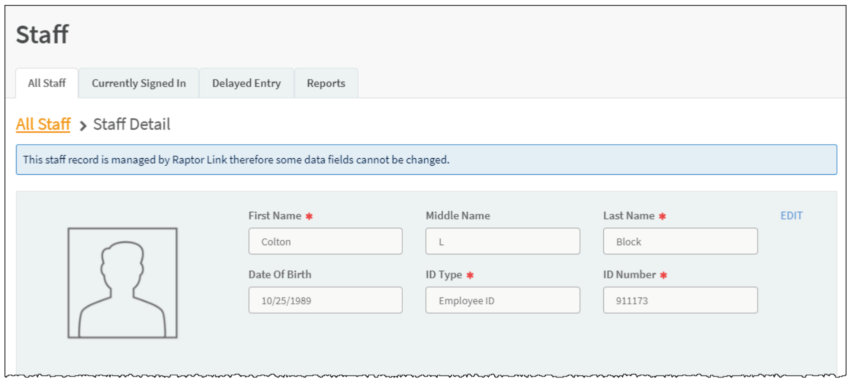
   When the import has completed processing, an email will be sent to the email address of the user indicating the number of records successfully imported and any error that may have occurred.

   The imported roster information should now display in the **Staff Detail** workspace. See View Rosters REU.

View and Modify Staff Details

To view or modify the details about a specific staff member:

1. In the navigation menu, select **Modules > Staff**.
2. From the Building selector, select **All Buildings** or a specific school.
3. On the **All Staff** workspace, click the ▶ icon to expand the **Staff Detail** and view the information in the staff member's record.



4. If you want to modify the staff record, click **Edit** and modify the fields (asterisk * indicates a required field).

> **Note** For Raptor Link controlled staff records, you can only modify non-Raptor Link fields can be modified. Raptor Link controlled fields are indicated by the icon.

- **First Name***
- **Middle Name**
- **Last Name***
- **Date of Birth** – Click the icon and select the date of birth from the calendar.
- **ID Type*** – This field is *read only* and cannot be modified.
- **ID Number*** – The number on the Employee ID.
- **Substitute** – Select **Yes** or **No** from the drop-down list to indicate whether the staff member is a substitute teacher.
- **Preferred Contact Method** REU
- **Mobile Phone** REU
- **Office Phone** REU
- **Home Phone** REU

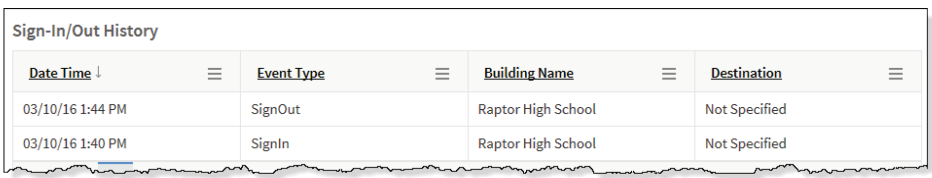
- **Email**
- **Primary Building(s)** – The building the staff member is associated with. The user can select one, multiple or no buildings.
- **Department** – Select the department to which the staff member belongs.
- **Type** – Select staff member's employee type.

5. Click **Save** to update the record.

View Sign In/Out History

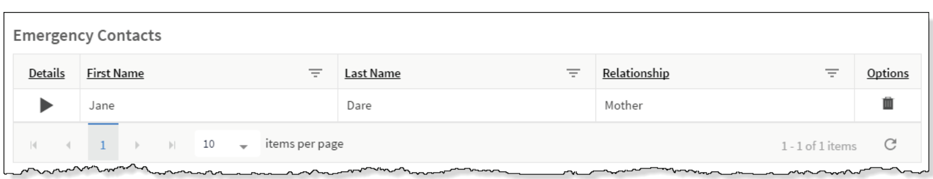
The **Sign In/Out History** area on the **Staff Detail** workspace displays a log of sign in and sign out events for the selected staff member.

By default, the Date/Time, Event Type, Building Name and Destination columns display. From the column menu, you can also select to display the Event Method and Notes columns.



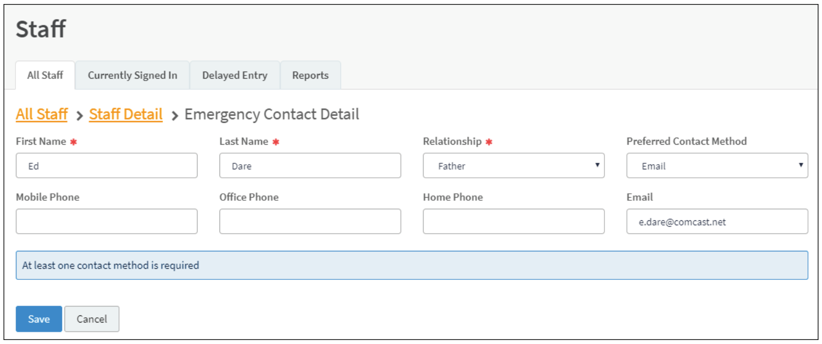
View and Modify Emergency Contacts REU

The **Emergency Contacts** area on the **Staff Detail** workspace displays the name and relationship of the person who has been designated as the staff member's emergency contact. This information is added to the staff member's profile when it is created or imported.



You can view the details and modify the information from the **Emergency Contact Detail** workspace.

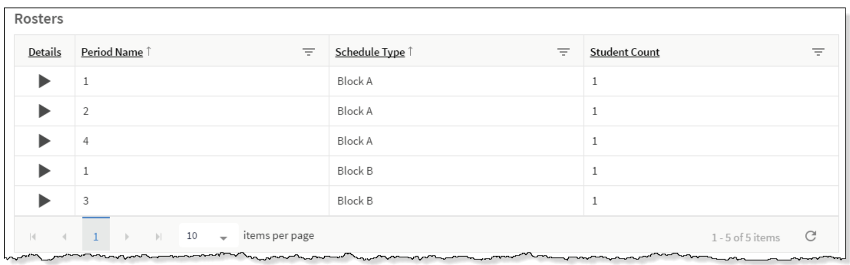
1. Click the ▶ icon to open the **Emergency Contact Detail** workspace.



2. Modify any of the information and then click **Save**.

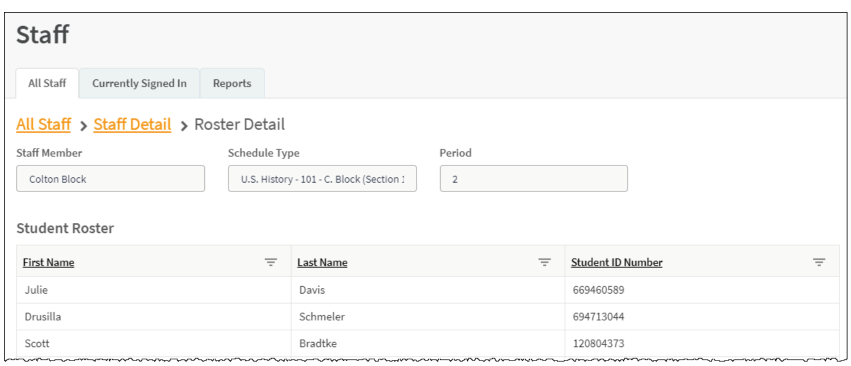
View Rosters REU

The **Rosters** area on the **Staff Detail** workspace displays the roster information for staff records.



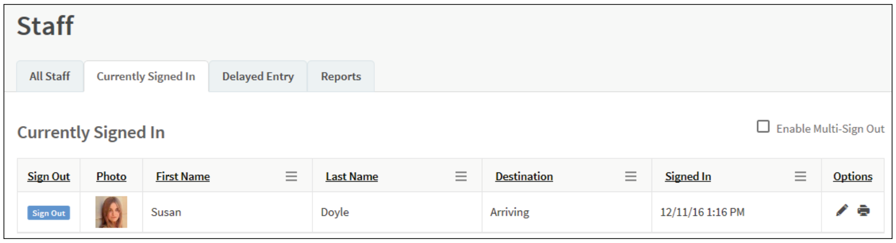
You can view the details from the **Roster Detail** workspace.

Click the ▶ icon to open the **Roster Detail** workspace and view the *read-only* information on the page.



Currently Signed In Staff

Use the **Currently Signed In** tab to view all staff sign in and sign out activity for the current day. You can also perform the following tasks from this tab.



View Sign-In Information

View the staff who are currently signed in, their photo, the sign in date and time, and the destination/reason for the sign in.

Modify Destination/Notes

Modify where the staff is in the building or the reason for the sign in, and any notes:

1. In the **Options** column, click the icon and select a new **Destination** from the drop-down list or enter it in the text field.
2. Click the icon to save your changes. If you want to cancel your changes, click the icon.

> **Note** If you change the Destination, they will be signed out and then immediately signed in with the new destination. This information will display in the Sign In/Sign Out history for the staff.

Print or Reprint Badge

If a staff member has lost their badge or changed their destination, or the printer has malfunctioned, you can reprint their badge.

In the **Options** column, click the icon to print or reprint the badge.

Sign Out Staff

You can sign out a single staff member or multiple staff members.

- To sign out a single staff member, click **Sign Out** next to their name.

  If a sign-out reason is required, enter the reason for signing out in the dialog box.

- To sign out multiple staff members, select the **Enable Multi-Sign-Out** check box in the upper right corner, select the check box next to all the staff to be signed out, and then click **Sign Out**.

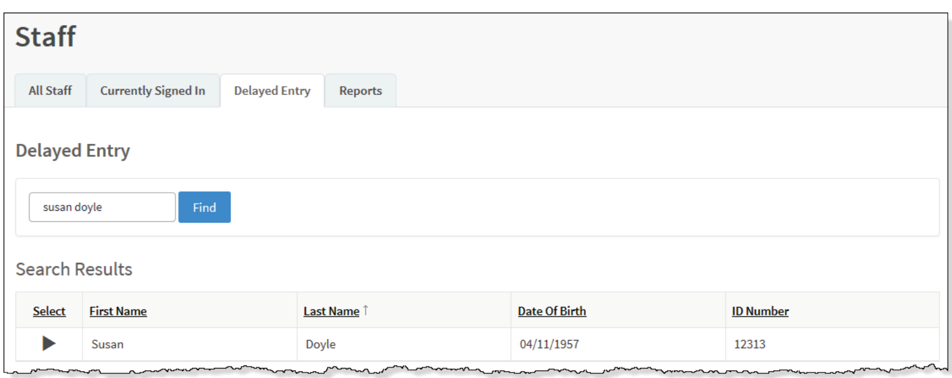
  To return to single sign-out mode, clear the **Enable Multi-Sign-Out** check box.

Delayed Sign In and Sign Out

Note This feature is not visible at the All Buildings level.

If you are unable to sign in or sign out due to equipment issues or internet connection issues, you can use the **Delayed Entry** feature to manually enter the sign-in and sign-out date and time. This feature allows users to record the actual sign-in and sign-out times but the entry is delayed until the system is available.

1. Select the school from the Building selector (you must select a specific building to use the delay entry feature).
2. From the navigation menu, select **Modules > Staff** and then click the **Delayed Entry** tab.
3. Enter the **First Name**, **Last Name**, or **Staff ID** in the text field, click **Find** and then select the person from the search results.

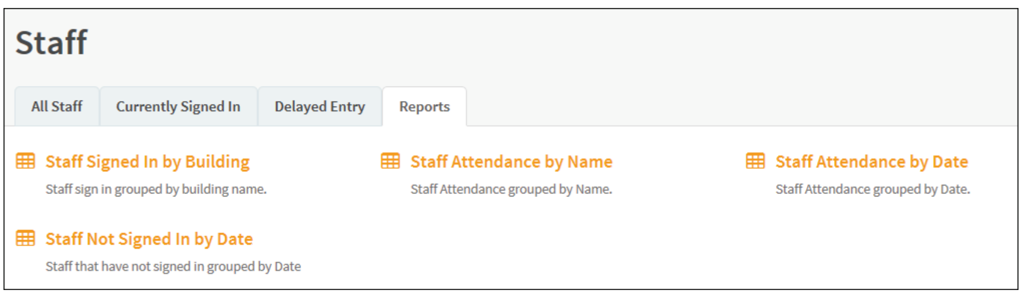


4. Complete the following information:
   - **Sign-In Date/Time*** – Click the icon to select the date and then click the icon to select the time that the person actually signed in.
   - **Sign-Out Date/Time** – If the system was still down when the person signed out, click the icon to select the date and then click the icon to select the time that the person actually signed out.
   - **Destination/Reason*** – Specify where the person is going in the building or the reason for sign in. You can select a pre-defined destination/reason from the drop-down list or enter another destination/reason in the text field.
5. Click **Submit**.

   A *Delayed Entry Successful* message displays in the lower right corner of the screen.

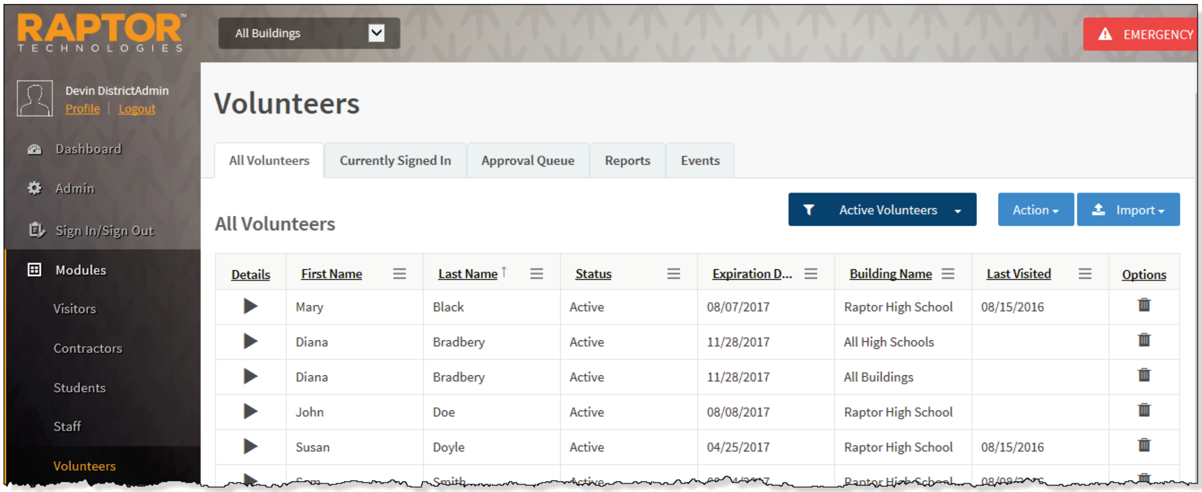
Staff Reports

Use the **Reports** tab to run reports for staff activity. See Staff Reports.



Managing Volunteers

You can manage volunteers using the **Volunteers** workspace.
Select **Modules > Volunteers** in the navigation menu and then click the tab in the **Volunteers** workspace for the tasks you want to perform.



All Volunteers

Administrators with the *Can Manage Volunteers* permission can use the **All Volunteers** tab to:

- Filter to view Active, Inactive or All volunteers
- View, edit and delete volunteers
- Create an application for a volunteer
- Email all volunteers
- Show/Hide Functions
- Deactivate and activate all volunteers
- Reset volunteer hours
- Import approved volunteers and applications (Administrators with the *Can Import Volunteers* permission)

Filter Volunteers

You can filter which volunteers display on the **All Volunteers** workspace.

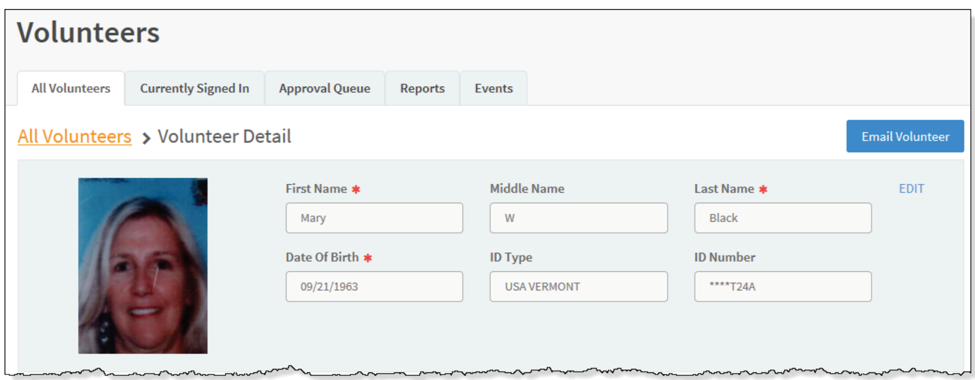
1. From the navigation menu, select **Modules > Volunteers**.
2. In the **Filter** drop-down list on the **All Volunteers** workspace, select **Active Volunteers**, **Inactive Volunteers**, or **All Volunteers** to specify which volunteers display in the workspace.

View or Modify Volunteer Details

Perform the following steps to view or modify the details about a specific volunteer.

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, click the ▶ icon next to the volunteer's name to expand the **Volunteer Detail** workspace.

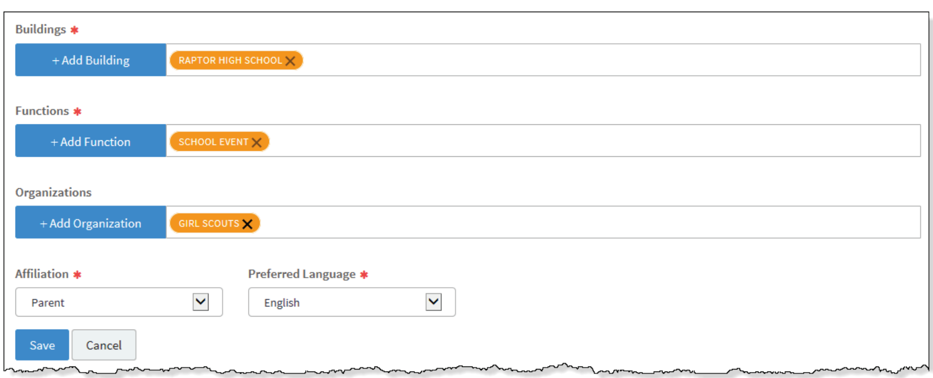
> **Note** The icon in the **Options** column indicates the record can only be modified at the client level (All Buildings).



3. If you want to modify the volunteer record, click **Edit** and modify any of the following information in the volunteer record (asterisk * indicates a required field):
   - **First Name***
   - **Middle Name**
   - **Last Name***
   - **Date of Birth*** – Click the icon and select the date and year.
   - **ID Type** – Type of government-issued ID (Driver License or Passport) that was used for identification.
   - **ID Number** – The identification number associated with the government-issued ID Type.

- **Official Record** – Select this check box if the volunteer record should become a permanent record in the Raptor system.
- **Assigned ID** – Used to store a non-government ID number that can be used for signing in via a 1D barcode reader (this feature is not yet available in the product). The Assigned ID must be a minimum of 4 characters.
- **Status** – Select Active or Deactivated from the drop-down list to change the status of the volunteer.
- **Expiration Date** – Click the icon and select the date and year.
- **Gender** – Select Female, Male or Unspecified from the drop-down list.
- **Race** – Select the volunteer's race or Unspecified from the drop-down list.
- **Maiden Name**
- **Address 1*** – Enter the volunteer's primary physical address.
- **Address 2/Address 3**
- **City*/State*/Zip Code*/Country***
- **Email** – Enter the volunteer's email address.
- **Primary Phone***– Enter the primary phone number for the volunteer.
- **Second Phone/Third Phone**

4. In the **Buildings*** area, click **Add Building** and select the **Building** to which the volunteer is associated.



5. In the **Functions*** area, click **Add Function** and select the function the person is volunteering for.
6. In the **Organizations** area, click **Add Organization** and select the organization the volunteer is associate with.

7. In the **Affiliation*** field, select how the volunteer applicant is associated to a student in Raptor (for example, mother or father).
8. In the **Preferred Language*** field, select the language the volunteer prefers to speak.
9. Click **Save** to update the record.

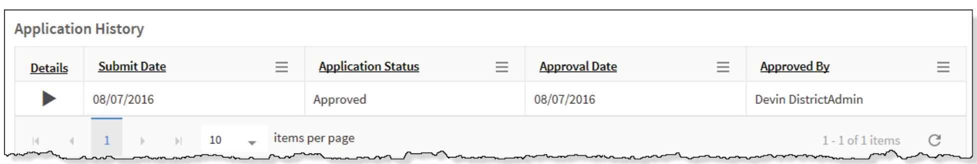
Delete Volunteer

You can delete a volunteer from the **All Volunteers** workspace.

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, click the icon in the **Options** column for the volunteer to be deleted.
3. On the confirmation dialog, click **OK** to confirm the deletion.

View Application History

At the client level (All Buildings), the **Application History** area on the **Volunteer Detail** workspace displays a log of all applications submitted by the volunteer. By default, the submission date, application status, approval date, and who approved the application displays.



View Application Details

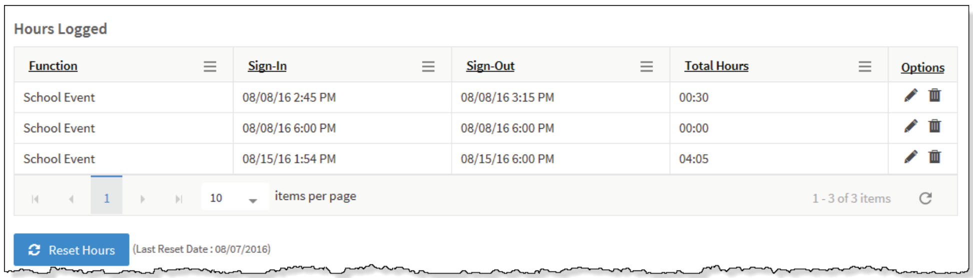
To view the details for a specific application, click the ▶ icon in the **Details** column.

View Hours Logged

The **Hours Logged** area on the **Volunteer Detail** workspace displays each function the volunteer has signed in for, the sign-in date and time, the sign-out date and time, and the total hours volunteered.

Administrators with the *Can Manage Volunteers* permission can edit the function, sign-in or sign-out date/time or delete an entry. Any of these actions will not alter the Sign In/Sign Out History.

Click **Reset Hours** to clear the tracked hours and reset the count to zero.


Hours Logged

Function	Sign-In	Sign-Out	Total Hours	Options
School Event	08/08/16 2:45 PM	08/08/16 3:15 PM	00:30	
School Event	08/08/16 6:00 PM	08/08/16 6:00 PM	00:00	
School Event	08/15/16 1:54 PM	08/15/16 6:00 PM	04:05	

1 10 items per page 1 - 3 of 3 items

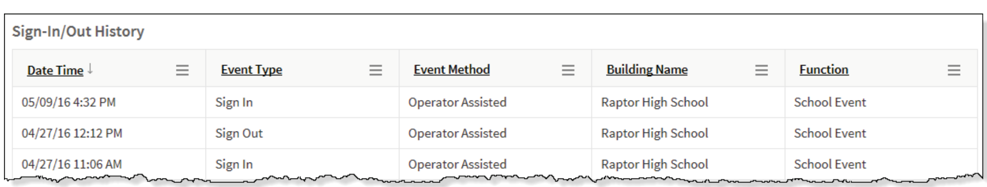
Reset Hours (Last Reset Date : 08/07/2016)

> **Note** You can also reset volunteer hours at the building or district level. See Reset All Hours.

View Sign In/Sign Out History

The **Sign-In/Out** area on the **Volunteer Detail** workspace displays a log of sign in and sign out events for the selected volunteer.

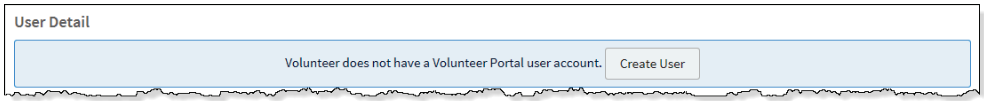
By default, the Date/Time, Event Type, Building Name and Destination columns display. From the column menu, you can also select to display the Event Method column.


Sign-In/Out History

Date Time	Event Type	Event Method	Building Name	Function
05/09/16 4:32 PM	Sign In	Operator Assisted	Raptor High School	School Event
04/27/16 12:12 PM	Sign Out	Operator Assisted	Raptor High School	School Event
04/27/16 11:06 AM	Sign In	Operator Assisted	Raptor High School	School Event

Create Volunteer Portal User Account

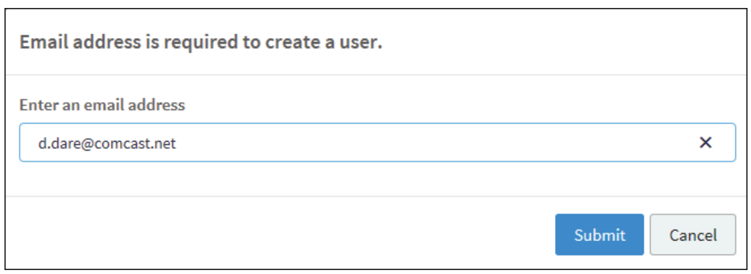
If the Volunteer Portal is enabled and the volunteer does not have a volunteer portal user account set up, the **User Detail** area on the **Volunteer Detail** workspace displays a message bar.



1. In the **User Detail** area on the **Volunteer Detail** workspace, click **Create User**.

   If the volunteer's detail already includes an email address, the user account is created, and the *Volunteer user created* message displays.

   If the volunteer does not have an email address saved in the Volunteer Detail, the following dialog displays.



2. Enter an email address for the volunteer and click **Submit**.

   The *Volunteer user created* message displays and an email with instructions on how to access the Volunteer Portal are sent to the email address.

> **Note** If the volunteer's email is already associated with another user account, an error will display. You must use an email address that is not in use by the Raptor System.

Show/Hide Functions

Volunteer Coordinators can filter the **All Volunteers** data grid to show those volunteers who are approved for a function. This filtered list can then be used to email those volunteers for events that require those functions.

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, click **Action** and select **Show/Hide Functions** to display the Functions column along with each function that the volunteers have been approved to participate.
3. Click the column **Filter** option to show only those volunteers who have the specific function associated with their profile.

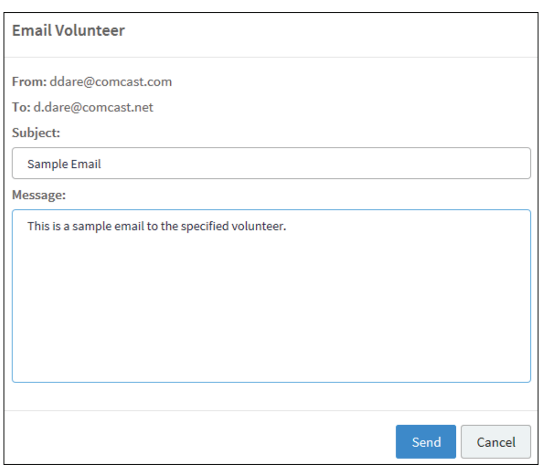
   The volunteers that meet this filtered function criteria display in the **All Volunteers** grid. You can now email these volunteers for a specific event that requires this function.

Email Volunteer from Volunteer Detail Workspace

Volunteer Coordinators can send an email to a specific volunteer from the **Volunteer Detail** workspace.

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, click the ▶ icon next to the volunteer's name to expand the **Volunteer Detail**.
3. Click **Email Volunteer**.

   > **Note** The **To** field (email recipient) will not be populated if the Email field in the Volunteer Profile does not contain a value.



4. Enter the email **Subject** and **Message**, and then click **Send**.

Deactivate and Activate All Volunteers

Users can deactivate and activate all volunteers from the **All Volunteers** workspace. You can perform this action at the client level (All Buildings) or for a specific building.

Deactivate Active Volunteers

Perform the following steps to deactivate all active volunteers.

1. From the navigation menu, select **Modules > Volunteers**.
2. Select the building or All Buildings from the Building Selector.
3. On the **All Volunteers** workspace, click **Action > Deactivate All**.
4. On the **Deactivate Volunteers Confirmation** dialog, click **Submit**.

   A confirmation displays stating all volunteers have been deactivated.

Activate All Volunteers

Perform the following steps to activate all inactive volunteers.

1. From the navigation menu, select **Modules > Volunteers**.
2. Select the building or All Buildings from the Building Selector.
3. On the **All Volunteers** workspace, click **Action > Activate All**.
4. On the **Activate Volunteers Confirmation** dialog, click **Submit**.

A confirmation displays stating all volunteers have been activated.

Reset All Hours

Users can reset volunteer hours for the district, building or an individual volunteer. The **Reset All Hours** feature clears the volunteer’s tracked hours and reset the count to zero.

The **Reset All Hours** feature can be used to reset all volunteers based on the value in the building selector (for example district-wide or building-wide), or for an individual volunteer.

> **Note** Resetting a volunteer's hours at any level will reset the hours across all buildings for that volunteer.

Reset All Hours from Volunteer Detail

In the **Volunteer Detail** workspace for an individual volunteer, the **Reset Hours** button resets the hours for the volunteer and clears the **Hours Logged** data grid for the volunteer. See View Hours Logged.

When the **Reset Hours** button is clicked, a message displays summarizing the action, and the ability to **Submit** or cancel the action.

Resetting volunteer hours at any of the levels does not affect the user's ability to report on volunteer hours prior to the reset date.

Reset All Volunteer Hours

Users can also reset all volunteer hours from the All Volunteers workspace.

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, click **Action > Reset All Hours**.
3. On the **Reset All Hours Confirmation** dialog, click **Submit**.

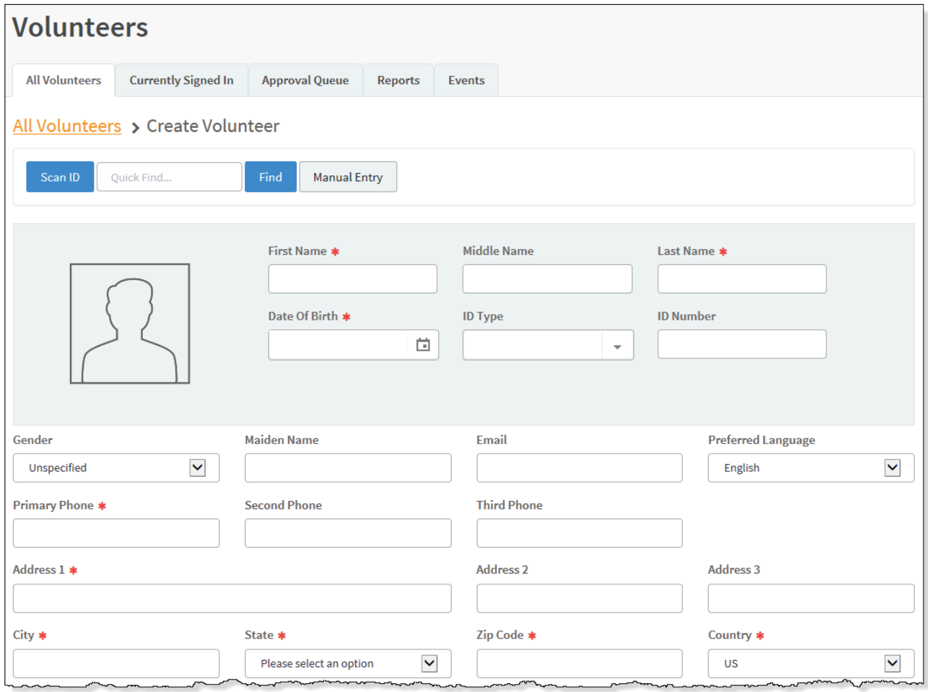
> **WARNING!**
>
> This action will reset the hours for all volunteers at All Buildings.

Create Volunteer

A volunteer application must be completed and approved before the applicant can participate as a volunteer. The operator assisted application is available from the **All Volunteers** tab.

To complete a volunteer application, perform the following steps:

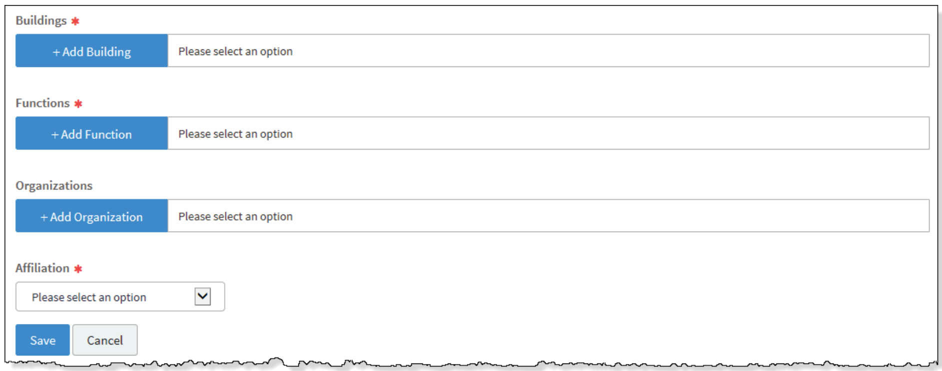
1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** tab, click **Action > Create Volunteer**.



3. Use one of the following methods to add the volunteer's information:
   - Insert their ID into the scanner and click **Scan ID**.
   - Enter their **First** or **Last Name** in the **Quick Find** text box and click **Find** (if they have previously been scanned or have an official record in the system). Select the name from the Search Results.
   - Click **Manual Entry** and then specify the information in the fields (* indicates required field):
     - First Name*
     - Last Name*
     - Date of Birth*
     - ID Type
     - ID Number
     - Gender
     - Maiden Name
     - Email
     - Preferred Language
     - Primary Phone*
     - Second Phone/Third Phone
     - Address 1*/Address 2/Address 3

♦ City*/State*/Zip Code*/Country*

4. In the lower portion of the screen, specify the following information.



- **Buildings*** – Click **Add Building** and select the **Building** to which the volunteer is associated.
- **Functions*** – Click **Add Function** and select the function the person is volunteering for.

> **Note** Only the functions created at the All Building level and for the specific buildings selected will be available.

- **Organizations** – Click **Add Organization** and select the organization the volunteer is associated with.
- **Affiliations*** – From the drop-down list, select how the volunteer applicant is associated to a student in Raptor (for example, mother or father).

5. Click **Save**.

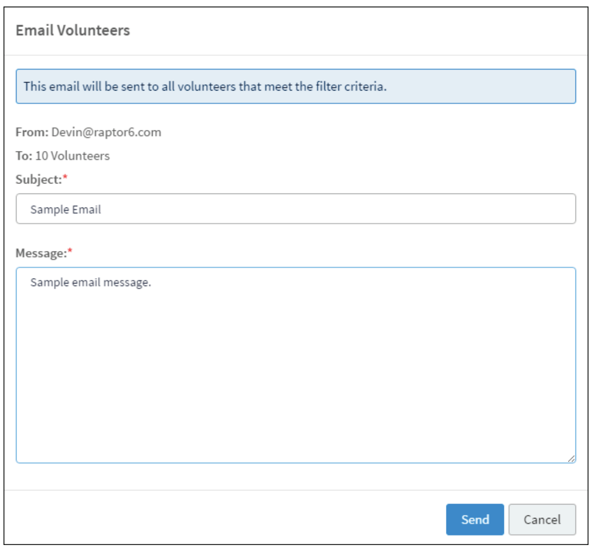
A message displays indicating the application was successfully saved.

Email All Volunteers

Volunteer Coordinators can send an email to all volunteers from the **All Volunteers** workspace.

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, filter to display the volunteers you want to email. For example, select **All Buildings** and **Active Volunteers**.
3. Click **Action > Email All**.

   A dialog box displays confirming the volunteers based on the selected filters.
4. Click **Proceed** on the confirmation dialog or click **Filter List Further** to return to the **All Volunteers** grid to change your filtered list.



5. Enter the email **Subject** and **Message**, and then click **Send**.

Import Approved Volunteers

For Administrators with the *Can Import Volunteers* permission, the Import Volunteers utility enables you to import a list of pre-approved volunteers into the Raptor system. It also includes the ability for unattended import of volunteers by creating a manifest file that includes information about the field mapping and file to be imported.

> **Notes**
> - When you import volunteers, the volunteers do not go through the approval process. Their records are immediately created in the system.
> - A Volunteer Portal account ***will not*** be automatically created for the imported volunteers.
> - To use this feature, you must first create an Excel spreadsheet or comma delimited file that contains the required information.
> - The use of special characters in an Excel formatted import file may cause unexpected results.

The file can contain the following Volunteer information to be imported:

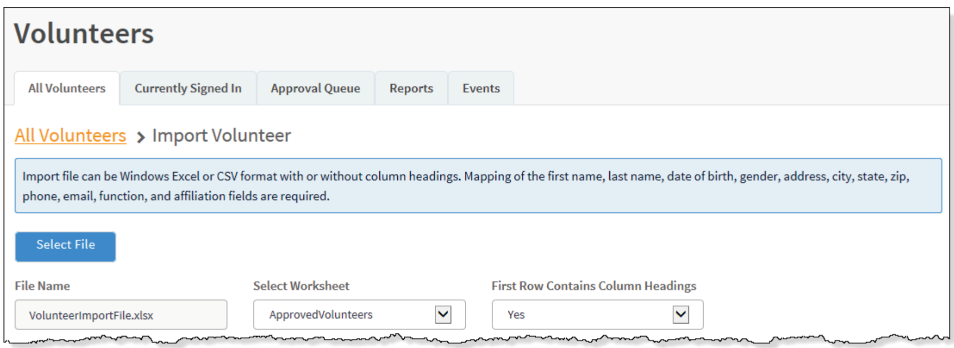
- First Name*
- Last Name*
- Middle Name
- Date of Birth*
- ID Type
- ID Number
- Assigned ID
- Gender*
- Address*/City*/State*/Zip Code*
- Primary Phone*
- Email*
- Function*
- Affiliation*
- Organization
- Expiration Date
- Preferred Language

> **Note** To import multiple Functions and/or Organizations, enter all items into the appropriate Excel cell of your import file, separating each function and or organization with a vertical bar (|). For example, if you have multiple functions, in the Function cell, enter Hall Monitor | Mentor.

*Indicates required information.

Perform the following steps to import a list of volunteers into Raptor:

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, click **Import > Approved Volunteers**.
3. Click **Select File** and navigate to the location where the file is saved on your computer.
4. Select the **Excel** or **CSV** file and click **Open**.

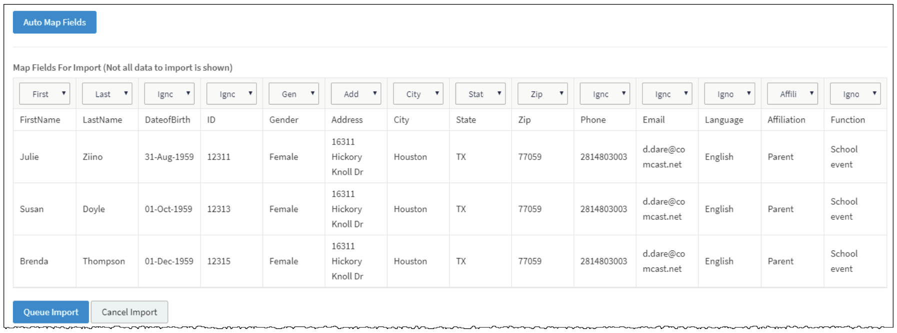


5. If you used Excel and the file contains multiple worksheets, select the worksheet that contains the volunteer information from the **Select Worksheet** drop-down list.
6. If the first row of the worksheet contains column headings, select the **Yes** from the **First Row Contains Column Headings** drop-down list and this row will not be imported. Otherwise, select **No**.
7. Click **Auto Map Fields** to automatically map the column headings in the file to the mapping names in Raptor. The names must be identical.

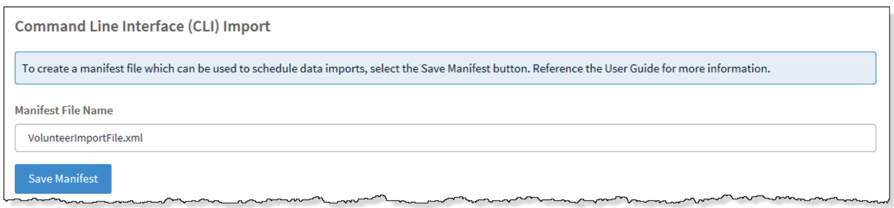
   You can also manually map each of the columns to be imported by selecting the appropriate fields in the drop-down menu above each column that displays.

   First Name, Last Name, Date of Birth, Gender, Address/City/State/Zip Code, Primary Phone, Email, Function and Affiliation are required columns.

   The columns with **Ignore** selected with not be imported.



8. If you want to create a manifest file to schedule automatic imports, click **Save Manifest** and save the file. You can then schedule the imports using a scheduling utility. See Using Manifest Import.



9. Click **Queue Import**.

   A message displays in the lower right corner of the screen stating that the import job was successfully added to the import queue for processing.

   When the import has completed processing, an email will be sent to the email address of the user indicating the number of records successfully imported and any error that may have occurred.

Import Volunteer Applications

The Import Applications utility enables you to import a list of volunteer applications into the Raptor system. The applications are sent to the **Approval Queue** where the Volunteer Coordinator can decide to approve or deny the application. If approved, the volunteer record is created in the system.

This import utility also provides the ability for unattended import of volunteer applications by creating a manifest file that includes information about the field mapping and file to be imported.

Notes

- You can only import volunteer applications for a specific building. You must have a building selected in the Building Selector to perform this task.
- To use this feature, you must first create an Excel spreadsheet or comma delimited file that contains the required information.
- The use of special characters in an Excel formatted import file may cause unexpected results.

The file can contain the following Volunteer information to be imported:

- First Name*
- Last Name*
- Middle Name
- Date of Birth*
- ID Type
- ID Number
- Gender*
- Address*/City*/State*/Zip Code*
- Primary Phone*
- Email*
- Function*
- Affiliation*
- Organization

Note To import multiple Functions and/or Organizations, enter all items into the appropriate Excel cell of your import file, separating each function and or organization with a vertical bar (|). For example, if you have multiple functions, in the Function cell, enter Hall Monitor | Mentor.

*Indicates required information.

Perform the following steps to import volunteer applications into Raptor:

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, click **Import > Applications**.
3. Click **Select File** and navigate to the location where the file is saved on your computer.
4. Select the **Excel** or **CSV** file and click **Open**.
5. If you used Excel and the file contains multiple worksheets, select the worksheet that contains the volunteer information from the **Select Worksheet** drop-down list.
6. If the first row of the worksheet contains column headings, select **Yes** from the **First Row Contains Column Headings** drop-down list and this row will not be imported. Otherwise, select **No**.
7. Click **Auto Map Fields** to automatically map the column headings in the file to the mapping names in Raptor. The names must be identical.

   You can also manually map each of the columns to be imported by selecting the appropriate fields in the drop-down menu above each column that displays.

   First Name, Last Name, Date of Birth, Gender, Address/City/State/Zip Code, Primary Phone, Email, Function and Affiliation are required columns.

   The columns with **Ignore** selected will not be imported.
8. If you want to create a manifest file to schedule automatic imports, click **Save Manifest** and save the file. You can then schedule the imports using a scheduling utility. See Using Manifest Import.
9. Click **Queue Import**.

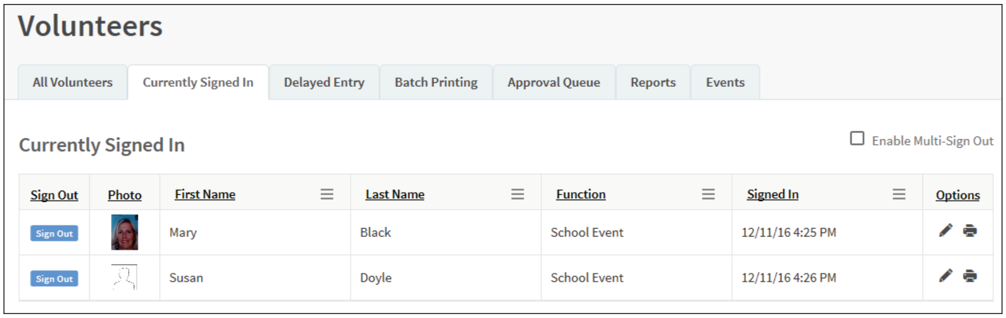
   A message displays in the lower right corner of the screen stating that the import job was successfully added to the import queue for processing.

   When the import has completed processing, an email will be sent to the email address of the user indicating the number of records successfully imported and any error that may have occurred.

   The volunteer applications go to the approval queue for the volunteer coordinator to approve or deny the application. See Approval Queue. If enabled, a Volunteer Portal user account will automatically be created when the application is approved.

Currently Signed In Volunteers

Use the **Currently Signed In** tab to view all volunteers who are currently signed in. You can also perform the following tasks from this tab.



View Sign-In Information

View the volunteers who are currently signed in, their photo, the sign in date and time, and their function. You can hover the cursor over the photo in the data grid to view an enlarged photo.

Print or Reprint Badge

If a volunteer has lost their badge or changed their destination, or the printer has malfunctioned, you can reprint their badge.

In the **Options** column, click the icon to print or reprint the badge.

Sign Out Volunteers

You can sign out a single volunteer or multiple volunteers.

- To sign out a single volunteer, click **Sign Out** next to their name.
- To sign out multiple volunteers, select the **Enable Multi-Sign-Out** check box in the upper right corner, select the check box next to all the volunteers to be signed out, and then click **Sign Out**.

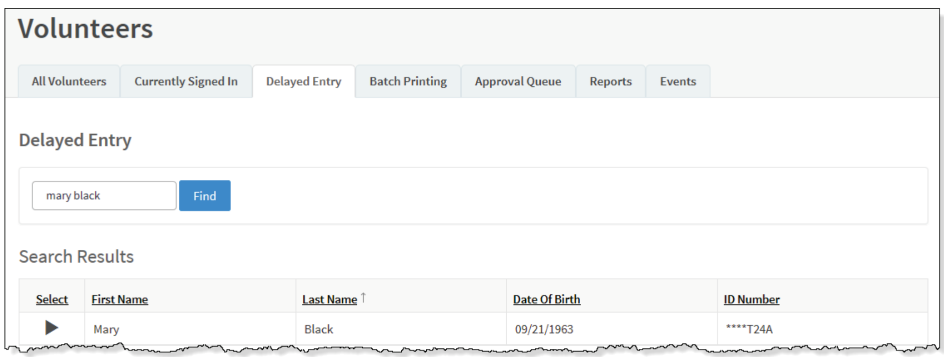
  To return to single sign-out mode, clear the **Enable Multi-Sign-Out** check box.

Delayed Sign In and Sign Out

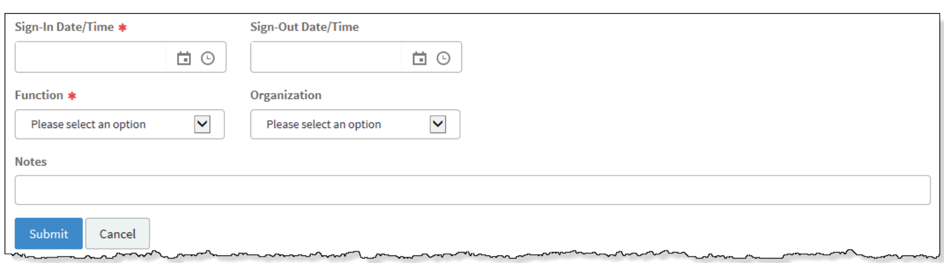
> **Note** This feature is not visible at the All Buildings level.

If you are unable to sign in or sign out due to equipment issues or internet connection issues, you can use the **Delayed Entry** feature to manually enter the sign-in and sign-out date and time. This feature allows users to record the actual sign-in and sign-out times but the entry is delayed until the system is available.

1. Select the school from the Building Selector (you must select a specific building to use the delay entry feature).
2. From the navigation menu, select **Modules > Volunteers** and then click the **Delayed Entry** tab.



3. Enter the **First Name** or **Last Name** in the text field, and then click **Find**.
4. From the search results, click the ▶ icon to select the volunteer.



5. Specify the following information:
   - **Sign-In Date/Time** – Click the icon to select the date and then click the icon to select the time that the person actually signed in.
   - **Sign-Out Date/Time** – If the system was still down when the person signed out, click the icon to select the date and then click the icon to select the time that the person actually signed out.
   - **Function*** – From the drop-down list, select the reason the volunteer is signing in.
   - **Organization** – From the drop-down list, select the organization associated with the volunteer.
6. Click **Submit**.

   A *Delayed Entry Successful* message displays in the lower right corner of the screen.

Batch Printing

> **Note** This feature is not visible at the All Buildings level.

The Batch Printing feature enables users to run a batch of volunteers through the sex offender and custom alert checks, and then print their badges in advance of a school event where many volunteers are expected to sign in for the same event at the same time.

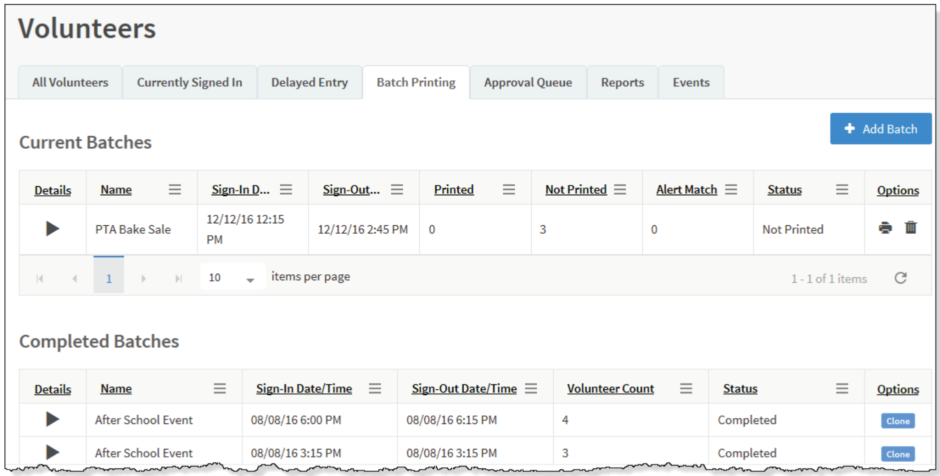
Using this feature speeds up the sign in process for an event and helps prevent a long line of volunteers at the Front Desk. When the volunteers arrive, you simply look at their ID and hand them their badge.

While running the batch, if one or more volunteers are flagged with an offender or custom alert, the user can view the alerts and decide if the person is a match. If they are a match, no badge is created and they will not be signed in at the time designated in the **Batch Detail**.

Add Batch Print Job

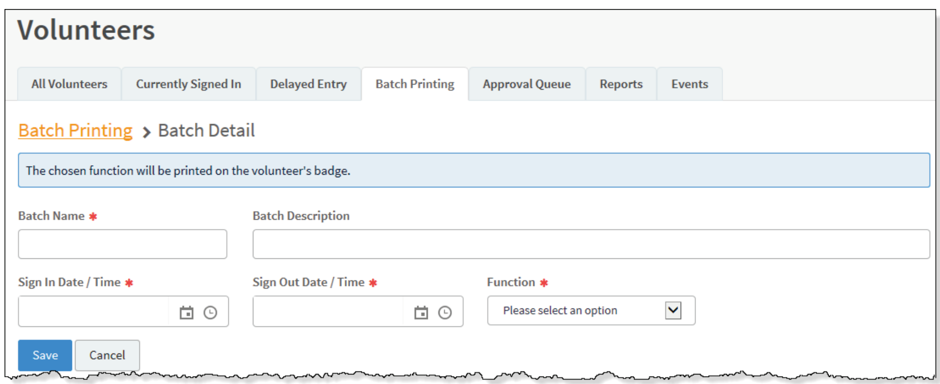
Perform the following steps to add and execute a batch print job.

1. Select the school from the Building Selector (you must select a specific building).
2. From the navigation menu, select **Modules > Volunteers** and then click the **Batch Printing** tab.



3. Click **Add Batch**.

> **Note** You can also copy a **Completed Batch** job and modify it to create a new batch job. See Cloning Batch Print Job.



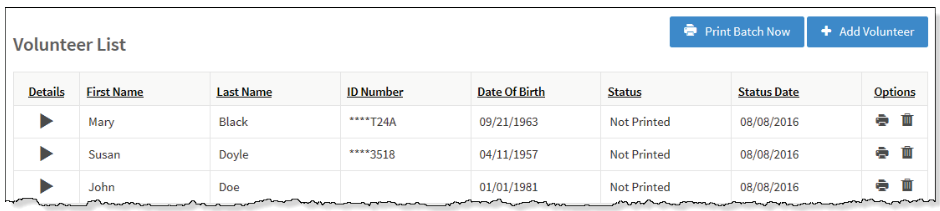
4. Enter the following information on the **Batch Detail** workspace (asterisk * indicates a required field):
   - **Batch Name*** – Enter a name for the batch job.
   - **Batch Description** – Enter a description for the batch job.
   - **Sign-In Date/Time*** – Click the icon to select the sign-in date and then click the icon to select the sign-in time.
   - **Sign-Out Date/Time*** – Click the icon to select the sign-out date and then click the icon to select the sign-out time.

> **Note** The **Sign-In Date** and **Sign-Out Date** must be the same date.

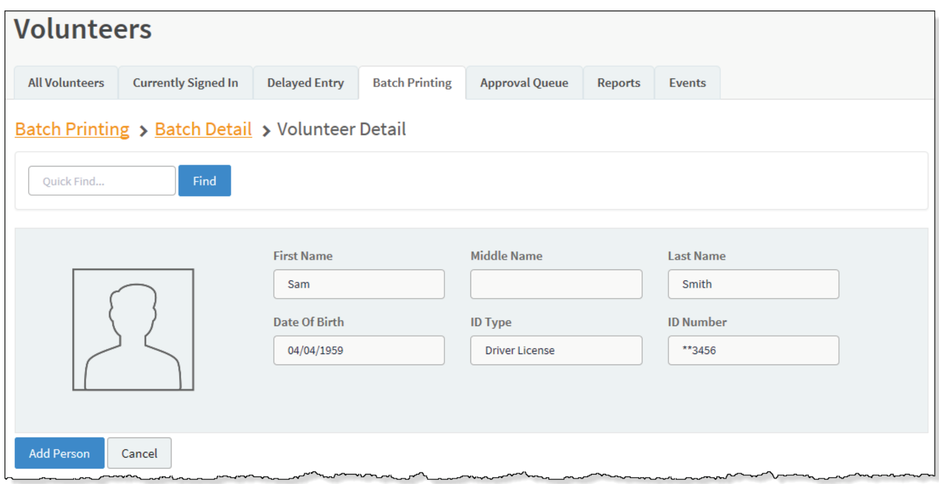
- **Function*** – From the drop-down list, select the reason the volunteer is signing in.

5. Click **Save**.
6. In the **Volunteer List** area on the **Batch Detail** workspace, click **Add Volunteer**.

> **Note** You can only add volunteers who are in the Raptor system to the batch.



7. Enter the volunteer's name in the text box and then click **Find**.
8. In the search results, click **Select** next to the volunteer's name.



9. On the **Volunteer Detail** workspace, click **Add Person**.
10. Repeat Step 6 through Step 9 for all volunteers to be added to the batch.

Print Batch

You can execute and print the batch from either the **Batch Printing** workspace or the **Batch Detail** workspace.

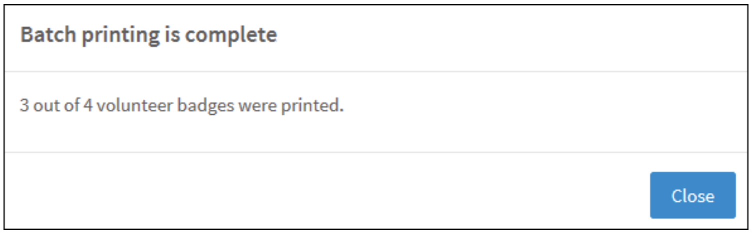
1. Use one of the following methods to execute and print the batch:
   - From the **Current Batches** area on the **Batch Printing** workspace, click the icon in the **Options** column to execute the batch.
   - From the **Volunteers List** area on the **Batch Print Details** workspace, click **Print Batch Now**.

   The following confirmation dialog displays.

2. Click **Continue**.
3. If a Possible Offender alert displays for any of the volunteers in the batch, review the information and determine if it is a match. See Possible Offender and Custom Alerts.
4. If the volunteer is a match to an offender or custom alert, the badge will not be printed and the following dialog displays.

5. Click **Close** to exit the dialog and continue with the batch printing.

   When all the badges have printed, a dialog displays indicating the **Batch printing is complete** and displays how many badges were printed.



6. Click **Close** to exit the dialog.

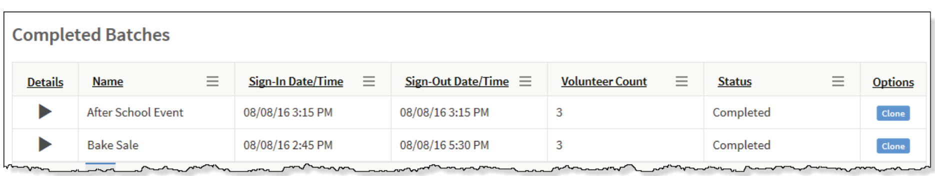
   On the date and at the time specified in the Batch Print **Sign-In Date/Time**, the volunteers will be automatically signed in to the Raptor system.

   On the date and at the time specified in the Batch Print **Sign-Out Date/Time** field, the volunteers will be automatically signed out.

Cloning Batch Print Job

The Clone Batch feature enables you to copy a **Completed Batch** job and modify it to create a new batch job. Perform the following procedure to clone a batch print job:

1. Select the school from the Building Selector (you must select a specific building).
2. From the navigation menu, select **Modules > Volunteers** and then click the **Batch Printing** tab.
3. In the **Completed Batches** area, click **Clone** in the **Options** column for the batch job you want to copy.



Completed Batches

Details	Name	Sign-In Date/Time	Sign-Out Date/Time	Volunteer Count	Status	Options
▶	After School Event	08/08/16 3:15 PM	08/08/16 3:15 PM	3	Completed	Clone
▶	Bake Sale	08/08/16 2:45 PM	08/08/16 5:30 PM	3	Completed	Clone

4. On the **Batch Detail** workspace, enter the following information (asterisk * indicates a required field):
   - **Batch Name*** – Optionally, modify the batch job name.
   - **Batch Description** – Optionally, modify the description for the batch job.
   - **Sign-In Date/Time*** – Click the icon to select the sign-in date and then click the icon to select the sign-in time.

- **Sign-Out Date/Time*** – Click the icon to select the sign-out date and then click the icon to select the sign-out time.

  > **Note** The **Sign-In Date** and **Sign-Out Date** must be the same date.

- **Function*** – From the drop-down list, select the reason the volunteer is signing in.

5. Click **Save**.

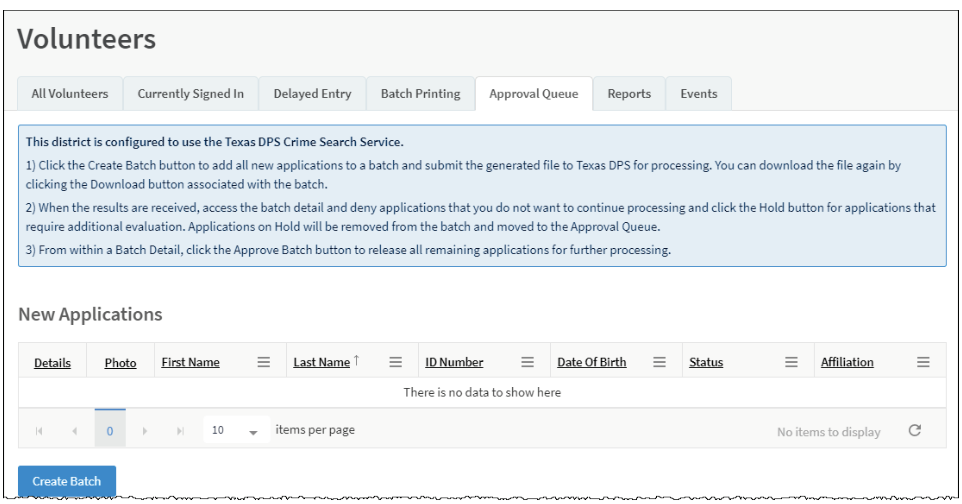
Approval Queue

The **Approval Queue** tab is used by the Volunteer Coordinator to approve or deny volunteer applications, and to review the application history log to see the status of an application.

If your district has the Texas DPS screening feature enabled, the volunteer applications can be exported to a batch file and sent to the Texas DPS for screening. Once the applications are returned, the volunteer coordinator can take the appropriate action to process the application.

> **Note** The Texas DPS screening feature is only available to districts within the state of Texas.

If this feature is enabled, the **New Applications** grid displays on the **Approval Queue** workspace.



When this feature is enabled, incoming volunteer applications go through the following workflow:

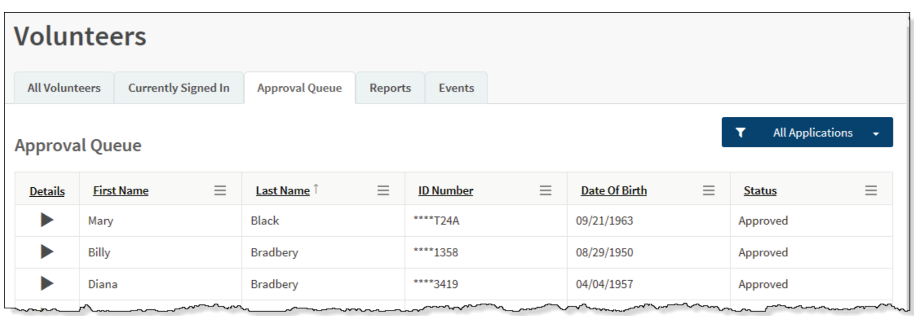
- The application status is set to *New* and the application is held in the **New Applications** area on the **Approval Queue** workspace.
- A batch is created (click **Create Batch**) when one or more applications are displayed in the **New Applications** area.
- A Texas DPS formatted file is generated and downloaded to the user's computer.
- The new batch is added to the **Pending Batch** area on the **Approval Queue** workspace.
- The user submits the batch file to the external provider (Texas DPS) for processing.
- Upon receipt of the results from the external provider, the Volunteer Coordinator takes the appropriate action to process the applications (Approve, Deny or Hold).

Refer to Create Batch for External Criminal Background Screening for the steps to be performed to use this feature.

If your district does not use the Texas DPS external screening feature to process applications, and the ***Automatically Approve When Requirements Satisfied*** feature is enabled, only those applications that do not meet the approval requirements will display in the **Approval Queue** for manual approval (**Pending Applications**).

You can view the reason these applications were flagged in the **Application History Log** section on the workspace before you approve the application.

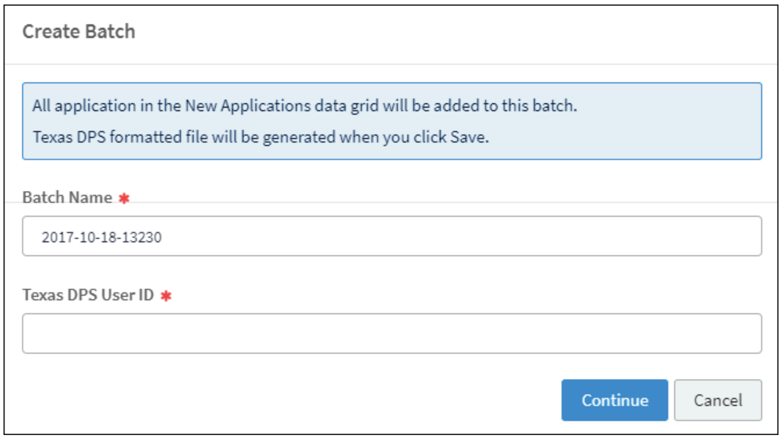
You must have the *Can Approve Volunteers* permission to see this tab.



Create Batch for External Criminal Background Screening

If this feature is enabled, all new applications display in the **New Applications** grid on the **Approval Queue** workspace. You must create a batch and submit the file to the Criminal Background Screening provider. When the results are received, you must complete the application approval process.

1. Click **Create Batch** to add all the new applications to a batch file.



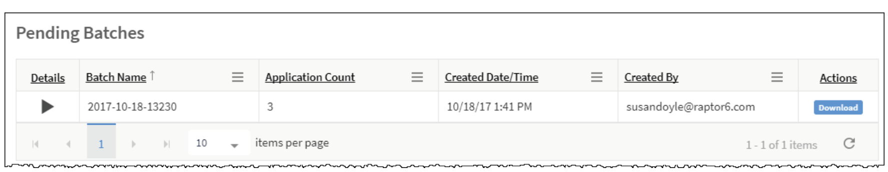
2. Enter a **Batch Name*** (if different than default name) and your **Texas DPS User ID***, and then click **Continue** to create the batch file.

   The batch file is downloaded in text format to your computer and is moved to the **Pending Batches** area on the **Approval Queue** workspace.

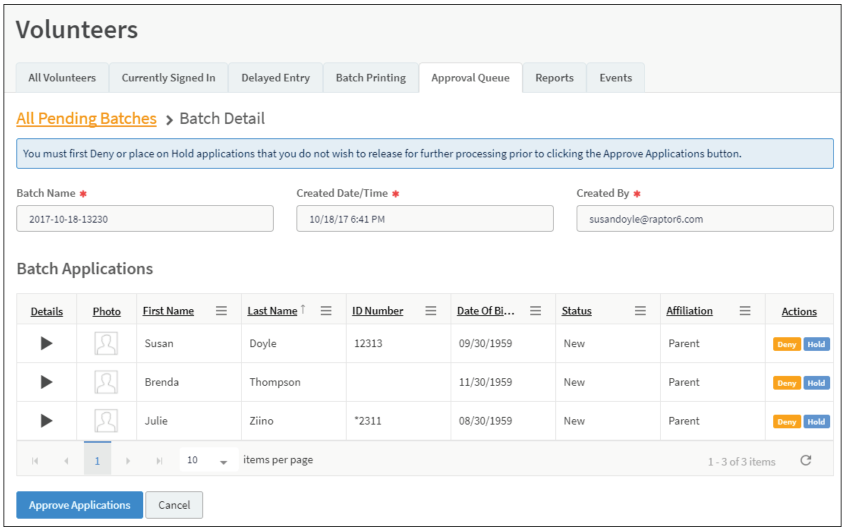
   You can also download the batch file from the **Pending Batches** grid. In the **Actions** column, click **Download**.

3. Submit the batch file to your external provider (for example, Texas DPS).

4. Upon receiving the results from the external provider, navigate to the **Pending Batches** area to continue processing the applications.



5. Click the ▶ icon to open the **Batch Detail** workspace.



6. Click the ▶ icon to review the details of each application.
7. Click one of the following buttons to process the applications in the batch:

> **Note** You must **Deny** or put on **Hold** any applications in the batch that are not going to be approved ***before*** clicking the **Approve Applications** button.

- **Deny** – Click this button if you want to deny the application and remove it from the batch. Enter a **Reason for denial** on the dialog and click **Continue**.

  The application is removed from the batch and *Application Denied - <Reason>* is entered in the History Log for the application.

- **Hold** – Click this button if you want to place a hold on the application for further processing. Enter a **Reason for Placing on hold** on the dialog and click **Continue**.

  The application is removed from the batch and moved to the Approval Queue with a *Pending* status. An *Application on Hold - <Reason>* is entered in the History Log for the application.

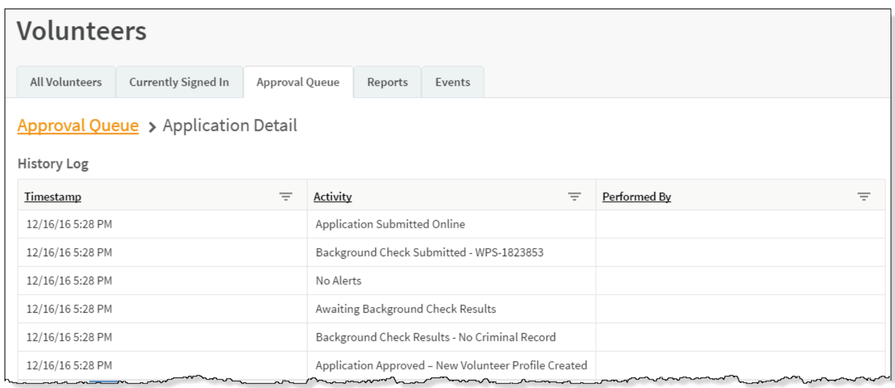
- **Approve Applications** – Click this button to approve any applications that remain in the batch and are approved for processing. Click **Continue** on the confirmation dialog to release the application from the batch and continue processing.

  A *Released from Texas DPS Batch <Batch Name>* is entered in the History Log for the application.

View Application History Log

Users with the *Can Approve Volunteers* permission can view a detailed log of a volunteer's application as it goes through the approval process. This allows the user to view the current state and take action if required.

1. From the navigation menu, select **Modules > Volunteers** and then click the **Approval Queue** tab.
2. From the **Filter** drop-down list in the upper right corner, select the volunteer applications to display (Pending Applications, Approved Applications, Denied Applications, or All Applications).
3. In the **Details** column, click the ▶ icon for the volunteer applicant.
4. On the **Application Detail** workspace, view the **History Log** of the volunteer's application.



The **History Log** includes the date and time of the activity, the activity description and the Username of the user performing the activity. Some activities that display in this log include:

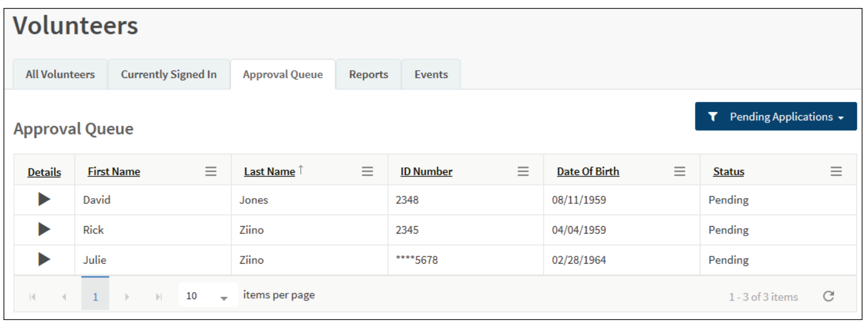
- Application Submitted Online
- Background Check Submitted
- Alerts Ready for Review – Indicates there are possible sex offender alerts ready to be reviewed by a user with the *Can Approve Volunteers* permission.
- No Alerts – Indicates there are no possible sex offender alerts associated with the volunteer applicant.
- Awaiting Background Check Results – Indicates the background check is in progress and results have not yet been returned.
- Background Check Results Ready for Review – Indicates the background check has been returned but needs reviewed.

- Background Check Reviewed – Indicates the background check has been reviewed.
- Background Check Results – No Criminal Record – Indicates the background check returned no criminal record for the volunteer applicant.
- Requirement <name of requirement> Complete
- Application Approved

Approve Volunteer Applicants

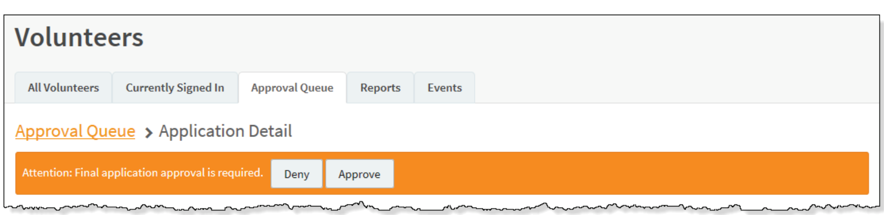
Volunteer Coordinators can manually approve or deny a volunteer application from the Approval Queue.

1. From the Building Selector, select the building or **All Buildings**.
2. From the navigation menu, select **Modules > Volunteers** and then click the **Approval Queue** tab.



3. From the **Filter** drop-down list in the upper right corner, select the volunteer applications to display (Pending Applications, Approved Applications, Denied Application, or All Applications). To approve applications, select **Pending Applications**.
4. In the **Details** column, click the ▶ icon for the volunteer applicant.

   If no alerts are generated for the applicant, the following screen displays where you can approve or deny the application.



5. On the **Application Detail** workspace, click **Deny** or **Approve** in the banner.
   - If you click **Approve**, the **Approval Confirmation** dialog displays. Click **Submit** to approve the application or **Cancel** to cancel the action.
   - If you click **Deny**, the **Reason for denial** dialog displays. Enter the reason why the application has been denied and then click **Continue**. If you want to cancel your action, click **Cancel**.

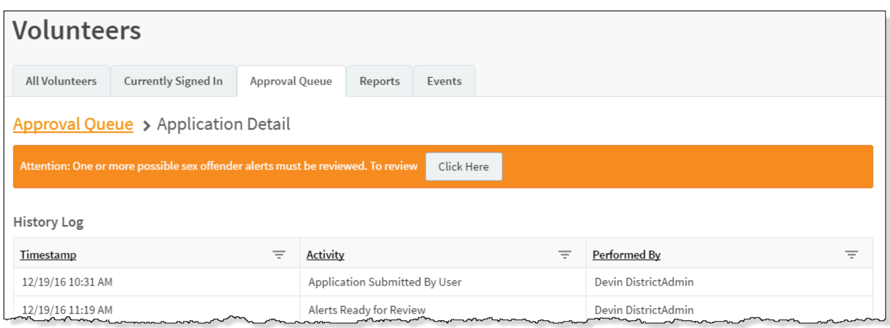
If the Volunteer Portal is enabled, a user account will be automatically created for the Volunteer Portal and an email with instructions on how to log in is sent to the volunteer applicant.

If the automated process is unable to create a Volunteer Portal user account, the volunteer coordinator can manually create a user account for the Volunteer Portal. See Create Volunteer Portal User Account.

Possible Offender Alert for Volunteer Applicant

> **Note** The Offender Check for volunteer applications feature must be enabled by Raptor.

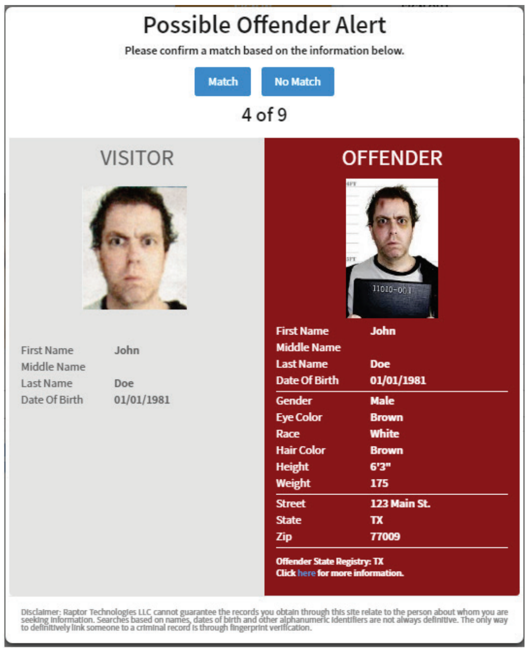
If a **Possible Offender Alert** is generated from a volunteer applicant, the volunteer coordinator will be prompted to review the information before approving the applicant.



Perform the following steps to review the information.

1. On the **Application Detail** workspace, click the **Click Here** button in the banner.

   The Possible Offender Alert displays.



2. Analyze the search results. Because there can be multiple possible matches, it is very important that you carefully compare the information displayed on the screen for **Your Volunteer Applicant** and the **Offender Alert** information.

   It is recommended that you compare the middle name, height, weight, race, and other physical details to verify a match. Not all states provide a photo and details of their offenders.

   > **Note** Raptor also matches on offender alias names. If this occurs, an *Alias Match* message displays below the offender's photo.

3. Confirm whether the information displayed on your screen is a match to the person being signed in. Perform one of the following actions:

   Match

   If the information displayed on the screen is a match, click **Match**.

   You are prompted to confirm the match. Click **Yes, it is a match** to confirm, or click **Cancel**.

The number of matches and the number of total Possible Offender Alerts are recorded in the History Log on the Volunteer Application, which will force the application to be manually approved (if the *Automatically Approve When Requirements Satisfied* feature is set to **Yes** on the **Volunteer Application Settings** workspace).

No Match

If the information displayed on the screen does not match your visitor's information, click **No Match**. If there are multiple records, the next possible match will display on the screen.

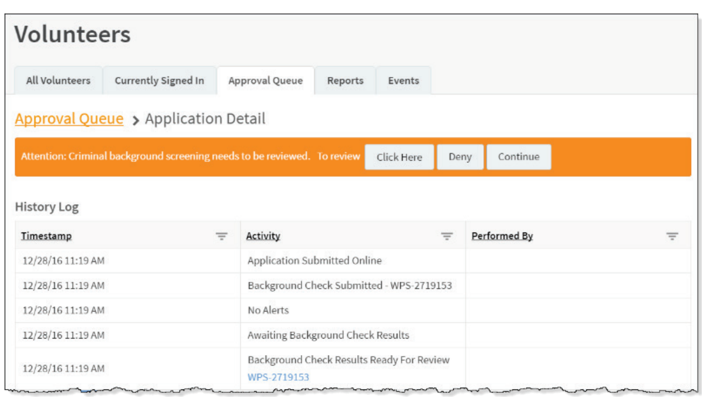
4. After the applicant has been reviewed, the volunteer coordinator can approve or deny the application using the instructions in Approve Volunteer Applicants.

Criminal Background Screening for Volunteer Applicant

If the *Criminal Background Screening* feature is enabled and a criminal record is returned for a volunteer applicant, the volunteer coordinator will receive an email indicating that a volunteer application needs your attention.

1. From the Building Selector, select the building or **All Buildings**.
2. From the navigation menu, select **Modules > Volunteers** and then click the **Approval Queue** tab.
3. From the **Filter** drop-down list in the upper right corner, select **Pending Applications**.
4. In the **Details** column, click the ▶ icon for the volunteer applicant.

   If the criminal background screening determines that the application needs additional review, the *Criminal background screening needs to be reviewed* displays on a banner on the **Application Detail** workspace and an entry *Background Check Results Ready For Review* is logged in the History Log.



> **Note** The user must have the *Can View Background Check Information* permission to view the criminal record for an applicant.

5. Perform one of the following actions depending on your permissions:

   View Criminal Background

   If you have the *Can View Background Check Information* permission:

   a. Click the **Click Here** button to review the criminal background search results.

   b. After reviewing the criminal record, click **Deny** or **Continue**.

      If you click **Deny**, the **Reason for denial** dialog displays. Enter the reason why the application has been denied and then click **Continue**. If you want to cancel your action, click **Cancel**.

      If you click **Continue**, the application is approved if the *automatically approve applications* feature is enabled.

   > **Note** For those customers that have associated Requirements to Functions where an applicant has selected these Functions, the Requirements must be satisfied and marked as complete before you can complete the approval process.

   Manually Approve Application

   If the *automatically approve applications* feature is disabled, you are prompted to manually approve or deny the application.

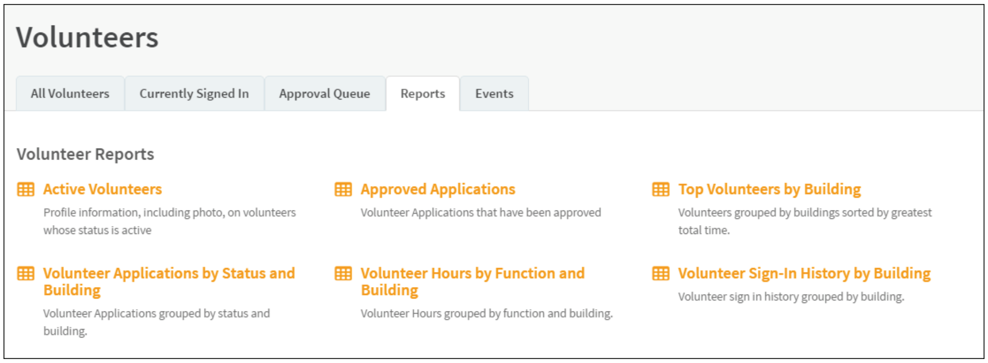
   On the **Application Detail** workspace, click **Deny** or **Approve** in the banner.

   - If you click **Approve**, the **Approval Confirmation** dialog displays. Click **Submit** to approve the application or **Cancel** to cancel the action.
   - If you click **Deny**, the **Reason for denial** dialog displays. Enter the reason why the application has been denied and then click **Continue**. If you want to cancel your action, click **Cancel**.

> **Note** For active volunteers that have submitted new applications that have been approved, the volunteer's profile will not be updated with the information on the new application until their expiration date, at which time their volunteer profile will be replaced with information from the newly approved application.

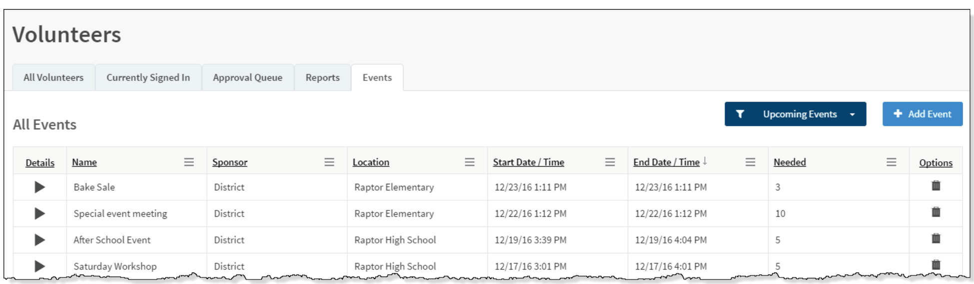
Volunteer Reports

Use the **Reports** tab to access and run any of the available volunteer reports. See Volunteer Reports.



Events

The **Events** tab is used by the Volunteer Coordinator to manage events, such as creating an event, viewing all events, modifying an event and deleting an event. You must have the *Can Manage Events* permission to see this tab.



View All Events

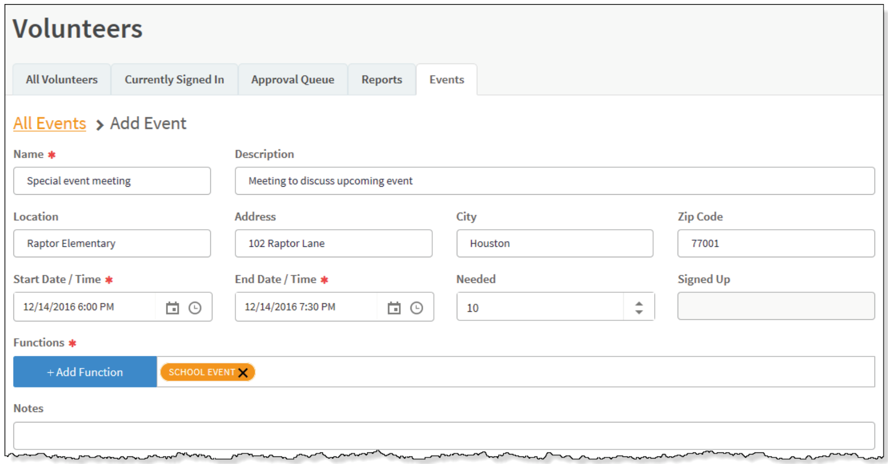
You can view all the events on the **All Event** workspace.

Use the **Filter** drop-down to narrow the search for specific events. You can filter to display Scheduled Events, Past Events and All Events.

Add Event

Volunteer events can be created at the building level or client level (All Buildings).

1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.
2. On the **All Events** workspace, click **Add Event**.



3. On the **Add Event** workspace, complete the following fields:
   - **Name*** – Enter a name for the event.
   - **Description** – Enter information that describes the event.
   - **Location** – Enter the name of the location (building) where the event will occur.
   - **Address** – Enter the physical address of the event location.
   - **City/Zip Code** – Enter the name of the City and postal zip code for the location of the event.
   - **Start Date/Time*** – Click the icon to select the date of the event and then click the icon to select the time the event starts.
   - **End Date/Time*** – Click the icon to select the date the event ends and then click the icon to select the time the event ends.
   - **Needed** – Select the number of volunteers needed to help with the event.
   - **Signed Up** – This *read-only* field indicates the number of volunteers who have already signed up for the event.
   - **Functions*** – Click **Add Function** and select the type of event from the drop-down list.

     > **Note** Only volunteers that have been approved for the Functions in the event detail, can sign up for that event.

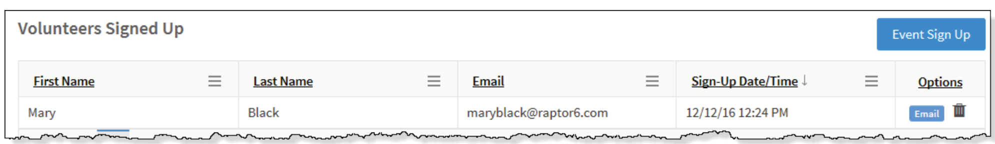
   - **Notes** – Enter any additional notes about the event.
4. Click **Save**.

View Volunteers Signed Up for Event

Volunteer Coordinators can view who has signed up to volunteer for an event from the **Event Detail** workspace.

> **Note** From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.

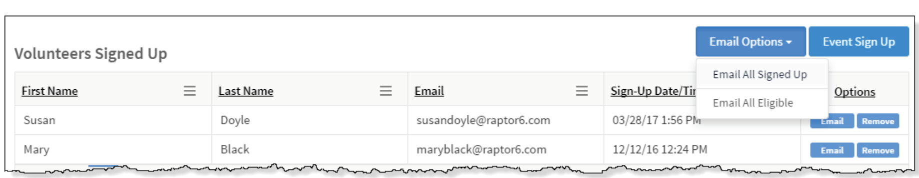
1. On the **All Events** workspace, click the ▶ icon next the event you want view.
2. On the **Event Detail** workspace, you can view the number of volunteers who have signed up for the event in the **Signed Up** field in the upper portion of the workspace.
3. Navigate to the **Volunteers Signed Up** area to view the volunteers who have signed up for the event.



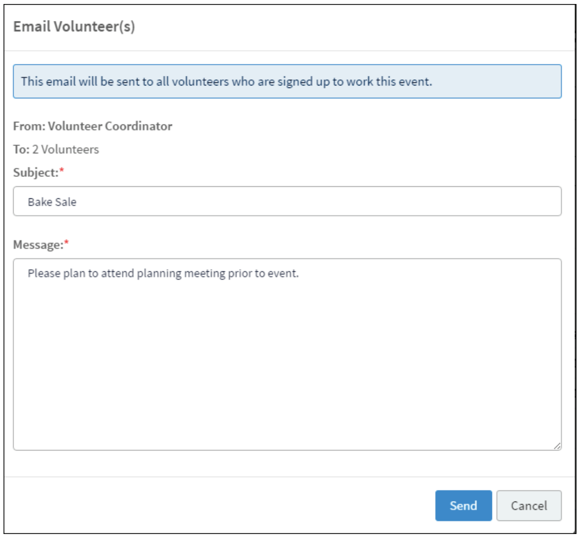
Send Email to All Volunteers Signed Up for Event

Users with the *Can Manage Events* permission can send an email to all volunteers who have signed up for a specific event.

1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.
2. On the **All Events** workspace, click the ▶ icon next to the event to expand the **Event Detail**.
3. In the **Volunteers Signed Up** area, click **Email Options** and select **Email All Signed Up** from the drop-down list.



4. Enter the email **Subject** and **Message**, and then click **Send**.

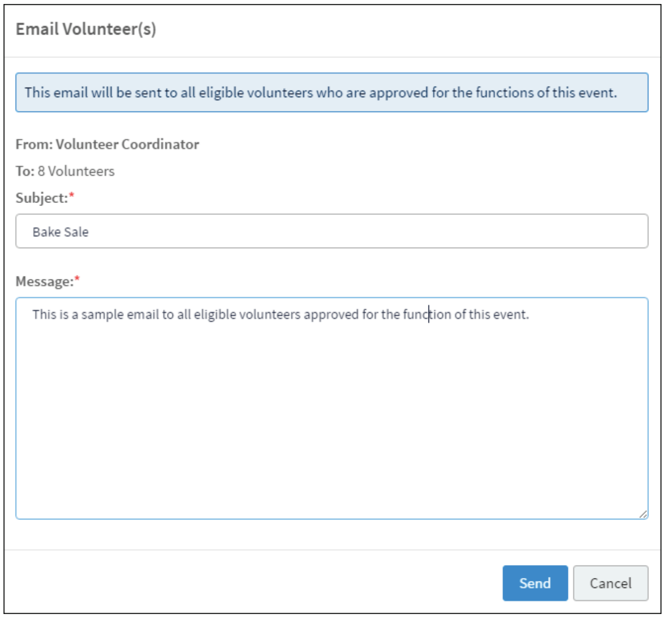


Send Email to All Eligible Volunteers for Event

Users with the *Can Manage Events* permission can send an email to all eligible volunteers for an event based on the function(s) selected for the event. An eligible volunteer is one who has an active status, is approved for one or more functions that are associated with an event, and who has not already signed up to volunteer for the event.

1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.
2. On the **All Events** workspace, click the ▶ icon next to the event to expand the **Event Detail**.
3. In the **Volunteers Signed Up** area, click **Email Options** and select **Email All Eligible** from the drop-down list.

> **Note** This email will be sent to all eligible volunteers who are approved for the functions of this event.

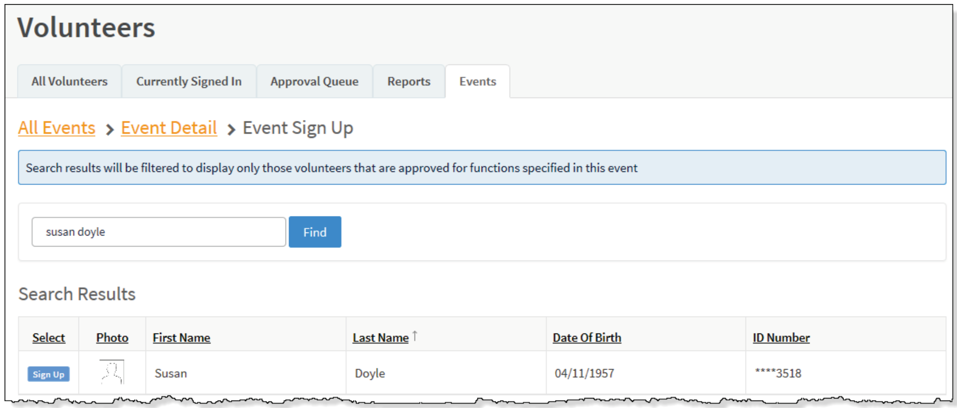


4. Enter the email **Subject** and **Message**, and then click **Send**.

Sign Up Volunteers for Event

Volunteer Coordinators can sign up volunteers for an event using the **Events** tab on the **Volunteers** workspace.

1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.
2. On the **All Events** workspace, click the ▶ icon next the event you want to add volunteers.
3. On the **Event Detail** workspace, navigate to the **Volunteers Signed Up** area and click **Event Sign Up**.
4. Enter the volunteer's **First** and/or **Last Name** in the text field and click **Find**.



5. In the **Search Results** area, click **Sign Up** next to the volunteer's name.

> **Note** Only those volunteers that match the search criteria and the Functions selected in the event detail will be returned in the Search Results.

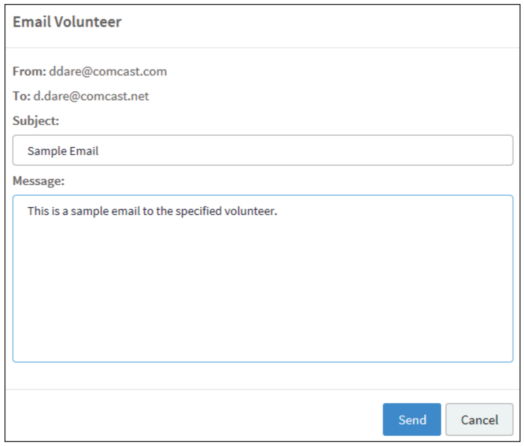
The volunteer displays in the **Volunteers Signed Up** area for the event and the number in the **Signed Up** field in the event detail increments.

Send Email to Individual Volunteer Signed Up for Event

Volunteer Coordinators can send an email to those volunteers who have signed up for an event from the **Event Detail** workspace.

1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.
2. On the **All Events** workspace, click the ▶ icon next to the event to expand the **Event Detail**.
3. In the **Volunteers Signed Up** area, click **Email** for the volunteer who you want to send an email.

> **Note** If the volunteer does not have an email address in their profile, the **Email** button does not display.



4. Enter the email **Subject** and **Message**, and then click **Send**.

Remove Volunteer from Event

Event Coordinators can remove a volunteer who is signed up for an event and reset the **Signed Up** number to reflect the change on the **Event Detail** workspace.

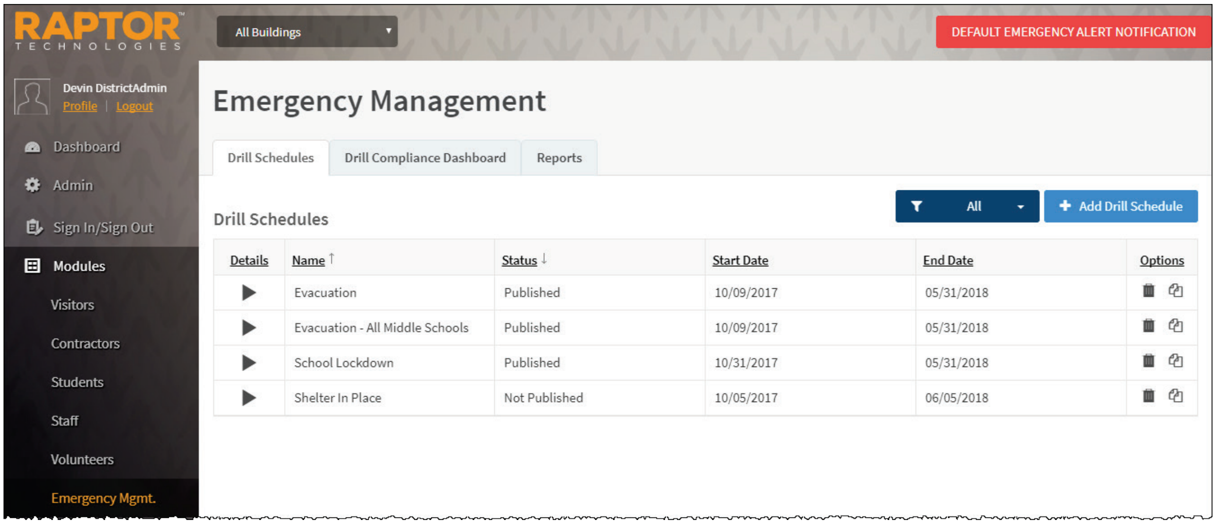
1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.
2. On the **All Events** workspace, click the ▶ icon next to the event to expand the **Event Detail**.
3. In the **Volunteers Signed Up** area, click **Remove** and then click **Yes** on the **Removal Confirmation** dialog.

   The **Email Removed Volunteer** dialog displays to send the volunteer an email that they have been removed from the event. Complete the **Message** and click **Send**.

   If the volunteer does not have an email address in their profile, the **To** field displays *null*. Click **Cancel** to cancel the email.

Emergency Management

The **Emergency Management** module enables you to manage the drills that will be used during emergencies.



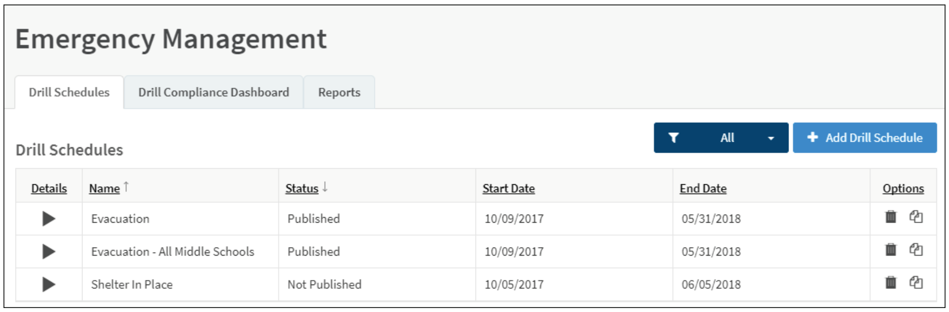
In Raptor, a drill schedule represents a container for a set of drill requirements that need to be performed. The drill requirement that is contained in the drill schedule represents the actual drill that needs to be performed.

For example, a Spring 2018 Schedule may be created that contains monthly fire drill and per semester lockdown drill requirements assigned to all buildings that are responsible for satisfying that drill.

Once the drill schedule is published, an instance of every drill requirement is generated to allow the district oversight and reporting capabilities for the buildings. It also gives the buildings insight into the drills they must perform.

Manage Drill Schedules

At the client level (All Buildings), you use the **Drill Schedules** tab on the **Emergency Management** workspace to create drill schedules and add requirements to them, such as emergency type and sub-type, and frequency of the drills.

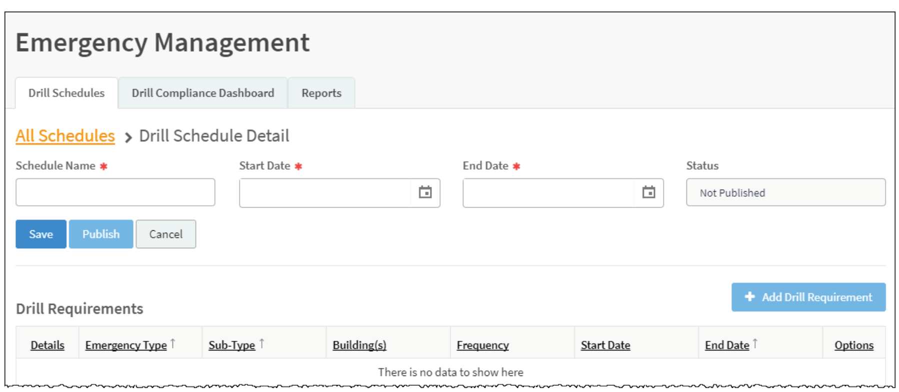


Once the drill schedules are created, you can save them for future use or publish them. Published schedules cannot be modified; you can only add requirements to an existing schedule or delete it.

Add Drill Schedule

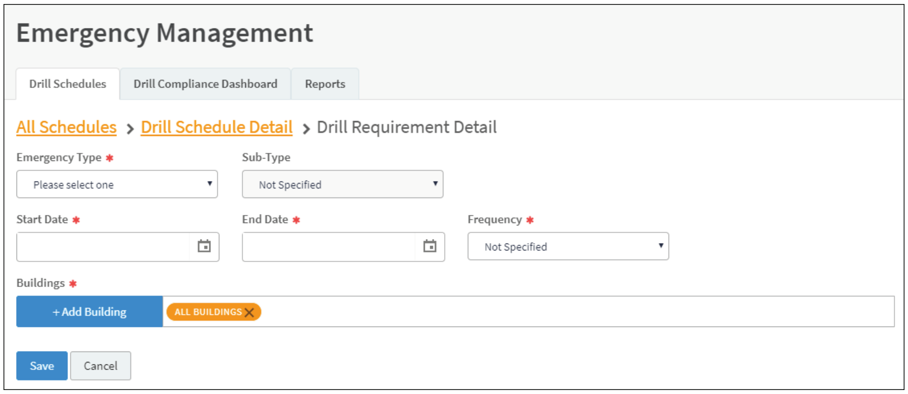
Perform the following steps to add a drill schedule:

1. In the navigation menu, select **Modules > Emergency Mgmt**.
2. On the **Drill Schedules** tab, click **Add Drill Schedule**.



3. Specify the following information:
   - **Schedule Name*** – Enter a name for the drill schedule.
   - **Start Date*** – Select the date the drill schedule begins.
   - **End Date*** – Select the date the drill schedule ends; the date must be less than 12 months from the start date.

4. Click **Save**. A *Drill schedule was saved successfully* message displays in the lower right corner.
5. In the **Drill Requirements** area, click **Add Drill Requirement**.



6. Specify the following information:
   - **Emergency Type*** – Select the type (category) from the drop-down list. Available types include Evacuation, Lockdown, Secure Perimeter, and Shelter).
   - **Sub-Type** – Optionally, select the emergency sub-type from the drop-down list.
   - **Start Date*** – Select the date this requirement begins.
   - **End Date*** – Select the date this requirement ends.
   - **Frequency*** – Select how often the drill requirement should occur.
   - **Buildings*** – Click **Add Building** and select the buildings where the drill requirement will be implemented. If you are at the client level, All Buildings is already populated in this field.
7. Click **Save**.
8. If you are ready to publish the drill schedule, click **Publish**.

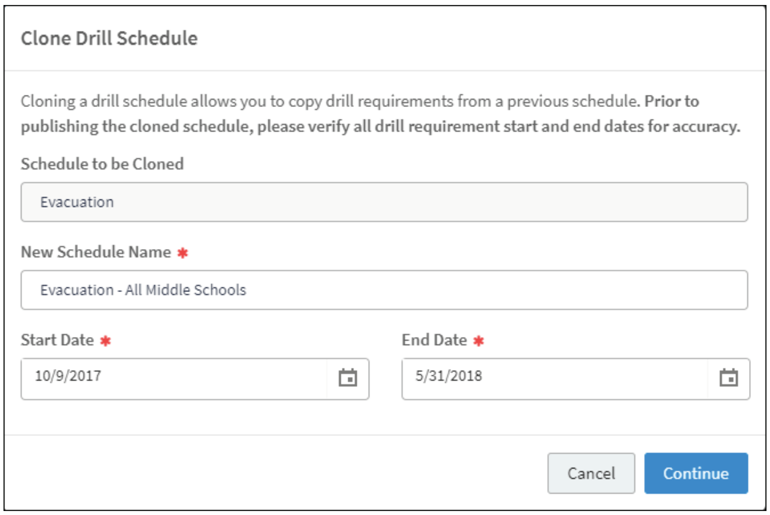
   Note Changes cannot be made to a drill schedule once it is published.

   A *Schedule published successfully* message displays in the lower right corner.

Clone Drill Schedule

Cloning a drill schedule allows you to copy drill requirements from a previous schedule.

1. In the navigation menu, select **Modules > Emergency Mgmt**.
2. On the **Drill Schedules** tab, click the icon for the drill schedule you want to clone.

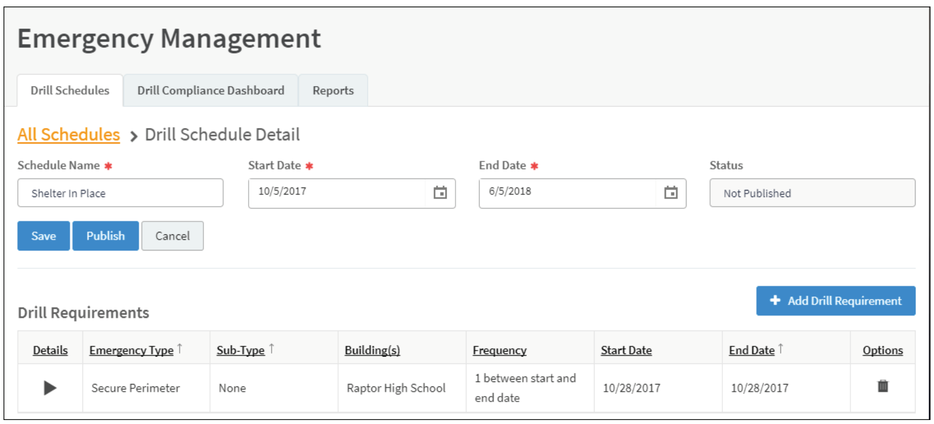


3. Specify the following information:
   - **New Schedule Name*** – Enter a name for the new drill schedule.
   - **Start Date*** – Select the date the new drill schedule begins.
   - **End Date*** – Select the date the new drill schedule ends; the date must be less than 12 months from the start date.
4. Click **Continue**.
5. In the **Drill Requirements** area on the **Drill Schedule Detail** workspace, click the ▶ icon to modify the drill requirements, or you can add new drill requirements for this drill schedule, if necessary.
6. After you have completed your changes, click **Save**.
7. If you are ready to publish the new drill schedule, click **Publish** and then click **Continue** on the confirmation dialog. If you want to discard the changes, click **Cancel**.

View and Modify Drill Schedules

You can modify drill schedules if they have not been published. If a drill schedule has been published, you can add, modify or delete drill requirements that are included in the schedule.

1. In the navigation menu, select **Modules > Emergency Mgmt**.
2. On the **Drill Schedules** tab, click the ▶ icon in the **Details** column to view the information about the drill schedule, modify an unpublish drill schedule and/or add drill requirements to a published drill schedule.



> **Note** If the drill schedule has been published, an orange banner displays indicating it has been published and changes are limited to adding or removing drill requirements.

3. If the drill schedule has not been published, you can modify any of the following information and then click **Save**:
   - **Schedule Name***
   - **Start Date***
   - **End Date***
4. If you want to add drill requirements to the drill schedule, click **Add Drill Requirement** and specify the following information:
   - **Emergency Type*** – Select the type (category) from the drop-down list. Available types include Evacuation, Lockdown, Secure Perimeter, and Shelter).
   - **Sub-Type** – Optionally, select the emergency sub-type from the drop-down list.
   - **Start Date*** – Select the date this requirement begins.
   - **End Date*** – Select the date this requirement ends.

- **Frequency*** – Select how often the drill requirement should occur.
- **Buildings*** – Click **Add Building** and select the buildings where the drill requirement will be implemented. If you are at the client level, All Buildings is already populated in this field.

5. Click **Save**.

   If the drill schedule has been published, the drill requirement will be added to the schedule upon saving it.

6. If the drill schedule has not been published and you are ready to publish it, click **Publish** on the **Drill Schedule Detail** workspace.

Delete Drill Schedule

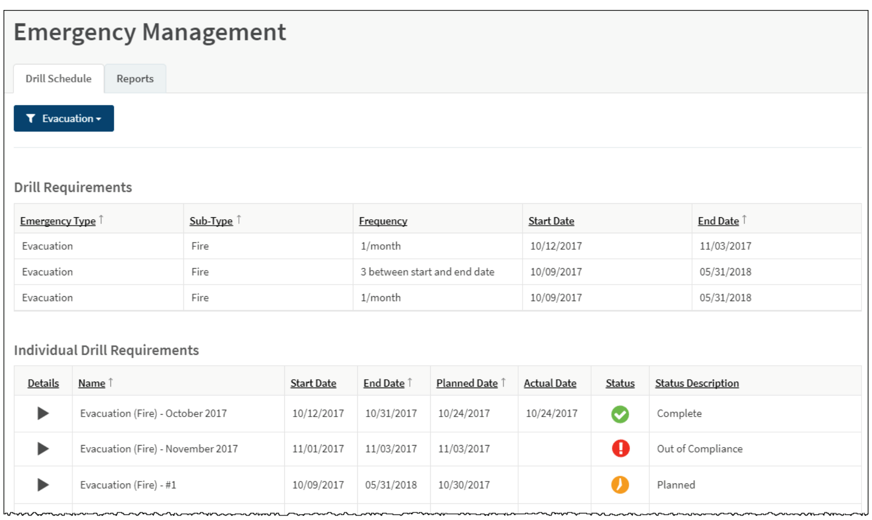
Perform the following steps to delete a drill schedule:

1. In the navigation menu, select **Modules > Emergency Mgmt**.
2. On the **Drill Schedules** tab, click the icon for the drill schedule to be removed.
3. Click **OK** on the confirmation dialog to complete the process.

Manage Drill Requirements (Building Level)

You use the **Drill Schedule** tab on the **Emergency Management** workspace to manage individual drill requirements at the building level.

The **Drill Requirements** display in the upper portion of the workspace.



Click the **Filter** button to narrow the drill requirements that display.

View Individual Drill Requirements

The drill requirements that display in the **Individual Drill Requirements** area are specific to the building that is selected. You use this area to manage compliance with the school's drill requirements.

Individual Drill Requirements

Details	Name	Start Date	End Date	Planned Date	Actual Date	Status	Status Description
▶	Evacuation (Fire) - October 2017	10/12/2017	10/31/2017	10/24/2017	10/24/2017		Complete
▶	Evacuation (Fire) - November 2017	11/01/2017	11/03/2017	11/03/2017			Out of Compliance
▶	Evacuation (Fire) - #1	10/09/2017	05/31/2018	10/30/2017			Planned
▶	Evacuation (Fire) - #2	10/09/2017	05/31/2018	10/29/2017	10/29/2017		Complete

The following information displays in the grid:

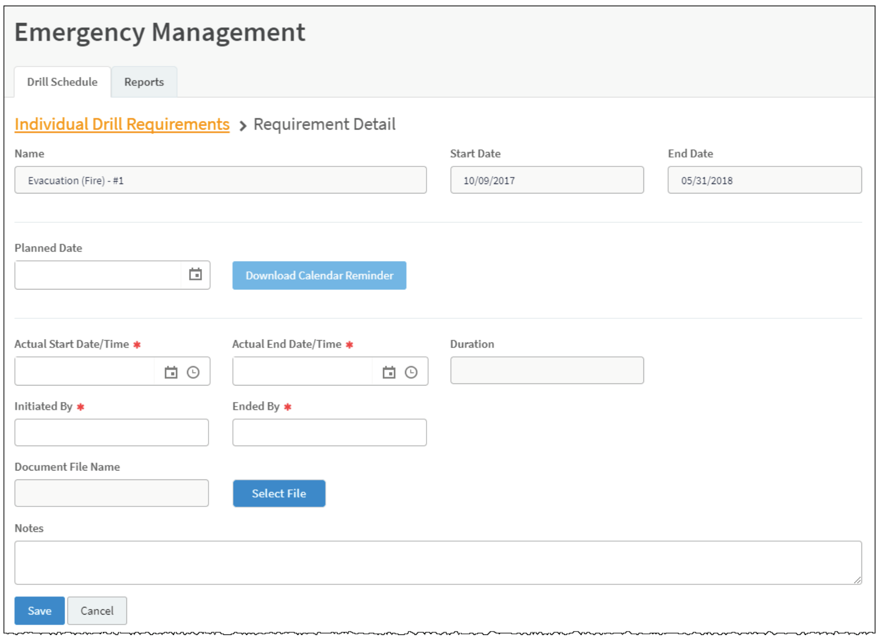
- **Name**—Name of the individual drill requirement
- **Start Date/End Date** – Date range the requirement must be completed.
- **Planned Date** – Date the requirement is planned to be completed.
- **Actual Date** – Date the requirement was completed.
- **Status/Status Description** – The current state of the drill requirement; the following options are available:

	Not Planned	The drill requirement is assigned to the school for completion but is currently not planned, completed, or is out of compliance.
	Planned	The school has identified a target date to complete the drill.
	Complete	The school has successfully completed the drill.
	Out of Compliance	The end date for the drill requirement has passed and the school has not completed the drill.
	Approved Exception	District user has intervened with the building's status and has marked it as an approved exception; the building did not complete the drill, but the district acknowledges the missed drill.

Specify Planned Date for Individual Drill Requirement

Perform the following steps to specify the date the drill requirement will be completed:

1. In the navigation menu, select **Modules > Emergency Mgmt**.
2. In the **Individual Drill Requirements** area on the **Drill Schedule** tab, click the ▶ icon in the **Details** column for the drill you want to update.



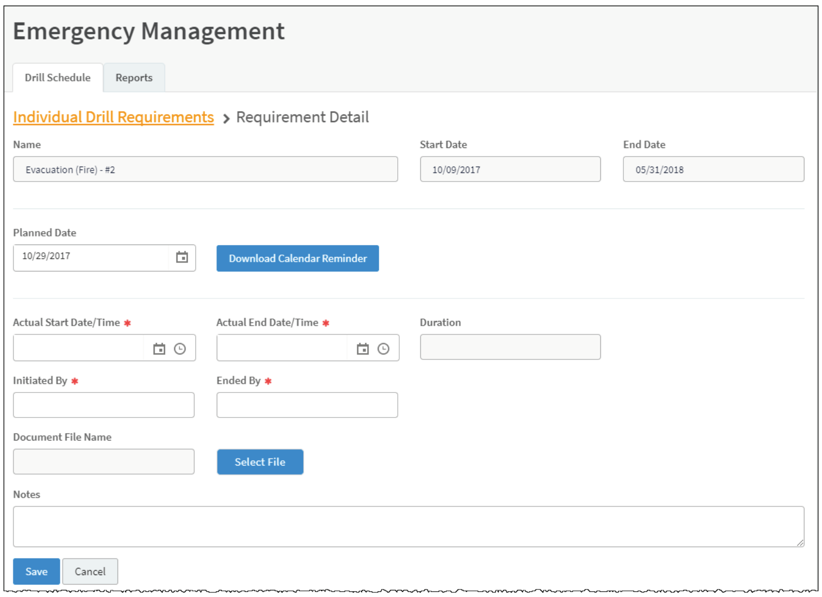
3. In the **Planned Date** field, select the date the drill is planned to be completed. The date needs to be between the Start Date and End Date displayed in the upper portion of the workspace.
    4. If you want to add a reminder to your Microsoft Outlook calendar, click **Download Calendar Reminder**. An invite is downloaded so you can add the event to your calendar.
    5. If you want to upload a document that is relevant to the drill, in the **Document File Name** area, click **Select File** and navigate to the file on your computer and select it.
    6. Click **Save**.

After specifying the **Planned Date**, the **Individual Drill Requirements** grid is updated to reflect the new status. The **Planned Date** column is populated, and the **Status** and **Status Description** columns are updated with the status.

Specify Completion of Individual Drill Requirement

Perform the following steps to specify the completion of the individual drill requirement:

1. In the navigation menu, select **Modules > Emergency Mgmt**.
2. In the **Individual Drill Requirements** area on the **Drill Schedule** tab, click the ▶ icon in the **Details** column for the drill you want to update.

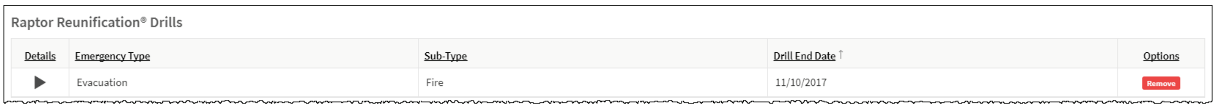


3. Specify the following information about the drill:
   - **Actual Start Date/Time*** – Select the date and time the drill was performed.
   - **Actual End Date/Time*** – Select the date and time the drill ended.
   - **Duration** – This is a read-only field that will automatically populate when the details are saved.
   - **Initiated By*** – Enter who started the drill (for example, a user name or role such as principal).
   - **Ended By*** – Enter who stopped the drill when it was complete.
   - **Document File Name** – If you want to upload a document that was used during the drill, click **Select File** and navigate to the file on your computer and select it.
   - **Notes** – Optionally, enter any notes related to the drill.
4. Click **Save**.

The **Individual Drill Requirements** grid is updated to reflect the new status. The **Actual Date** column is populated, and the **Status** and **Status Description** columns are updated with the status.

View Raptor Reunification Drills[REU]

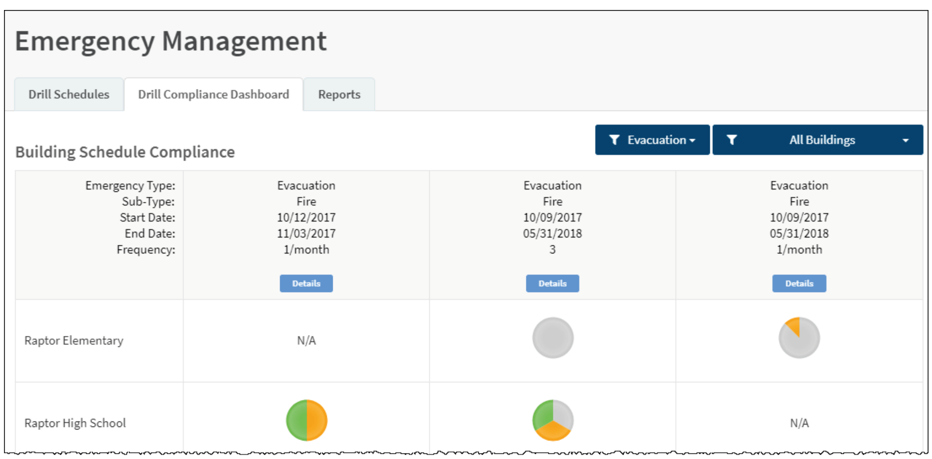
The drill details for drills that are initiated and ended by a mobile app user display in the **Raptor Reunification Drills** area on the **Requirement Detail** workspace.



As soon as the mobile app initiated drill satisfies the drill requirements, it will automatically be applied to the drill requirement and the columns in the grid will be populated.

View Drill Compliance Dashboard

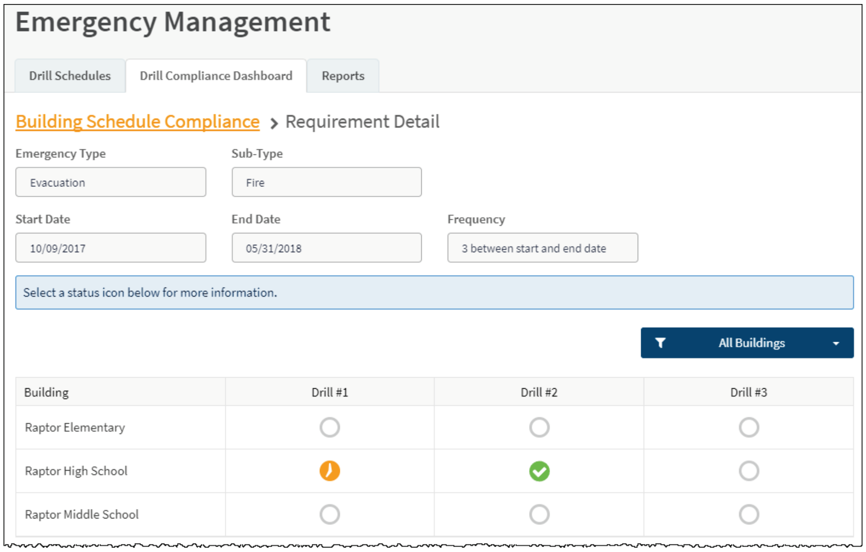
The Drill Compliance Dashboard is available at the All Buildings level and provides a visual status of the Building Schedule Compliance. You can filter by drill schedule type and filter by building group.



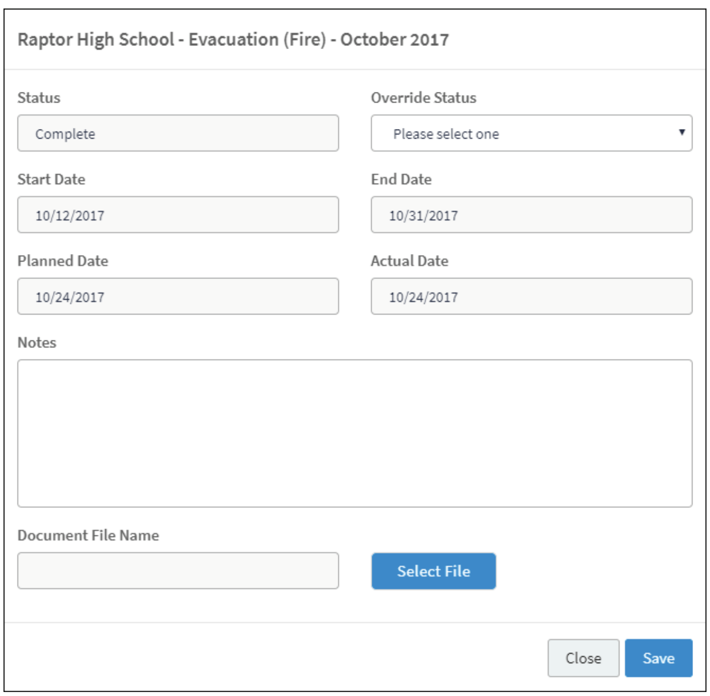
The Drill Schedule information displays across the top of the grid. Each row represents the buildings that are assigned to the drill schedule. N/A indicates the drill schedule is not applicable to the school.

View Requirement Details

1. To view the requirement details for a building drill schedule, click **Details**.



2. Click the icon to display additional information.

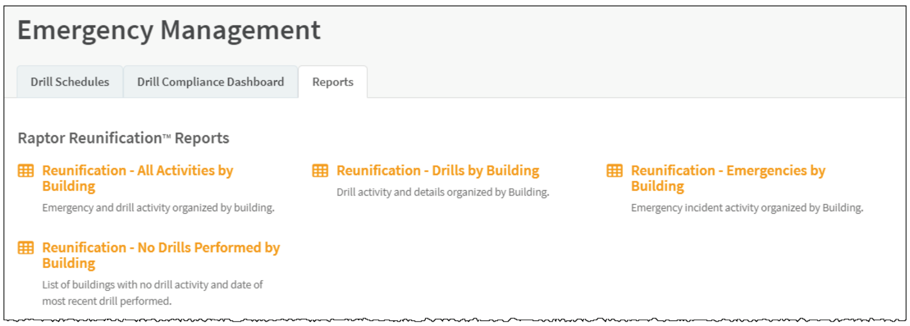


3. If you want to override the status of the drill requirement, select the new status from the **Override Status** drop-down list.

4. If you want to upload a document to associate with the drill requirement, click **Select File**, navigate to the file on your computer and select it.
5. Click **Save** to update the record.

Emergency Management ReportsREU

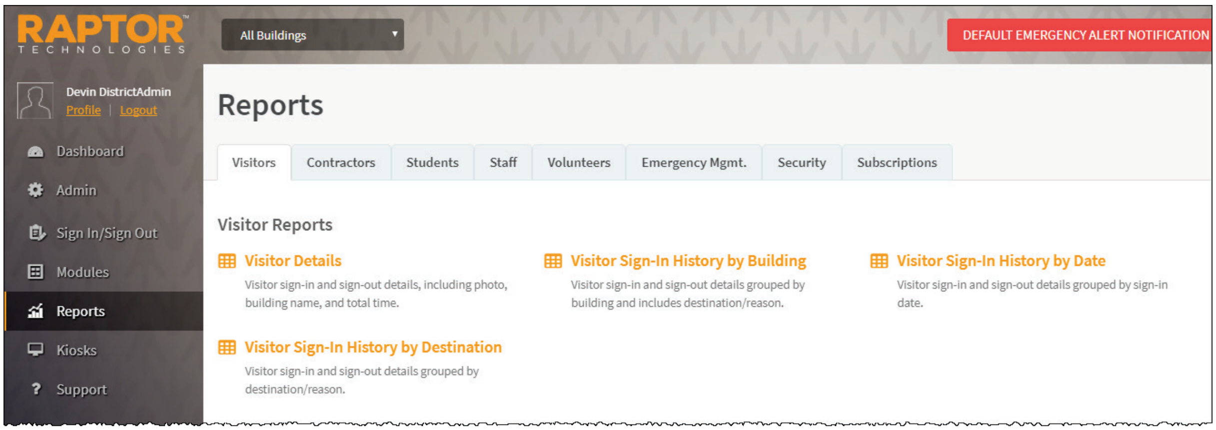
Use the **Reports** tab to access and run any of the available Raptor Reunification reports. See Reunification Reports.



Using Reports

The **Reports** workspace provides the reporting functionality in Raptor and organizing the output. After running a report, you can manipulate the contents of the report, export it to a PDF or Excel file, and print the report.

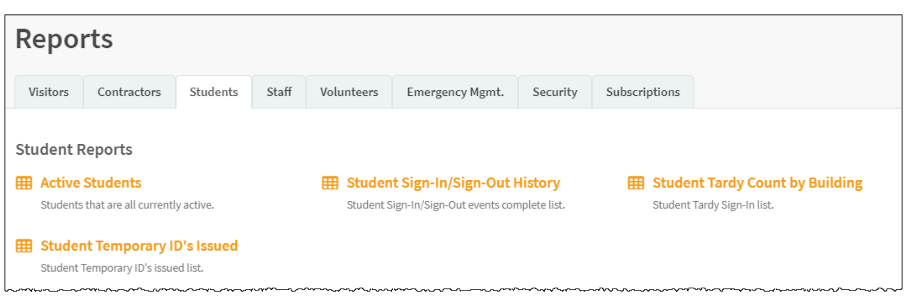
You can also set up report subscriptions from this workspace.



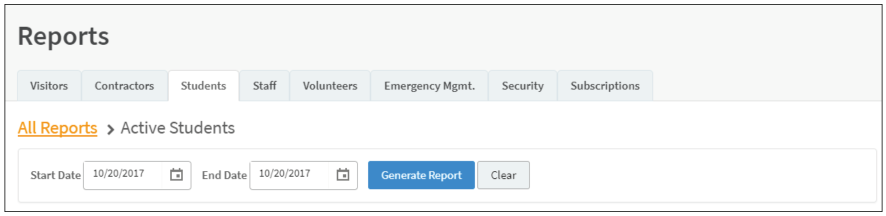
Generating Reports

Perform the following steps to generate a report:

1. Access the report using one of the following methods:
   - Select **Reports** in the navigation menu and click the tab for the type of report you want to run (Visitors, Contractors, Students, Staff, Volunteers, Reunification or Security).
   - Select **Modules** in the navigation menu and select the module (Visitors, Contractors, Students, Staff or Volunteers) and then click the **Reports** tab in the module workspace.
2. Select the specific building or **All Buildings** from the Building Selector.
3. Select the report that you want to generate.



4. Click the icon to select the **Start Date** and **End Date** for the date range to include in the report.



5. Click **Generate Report**.

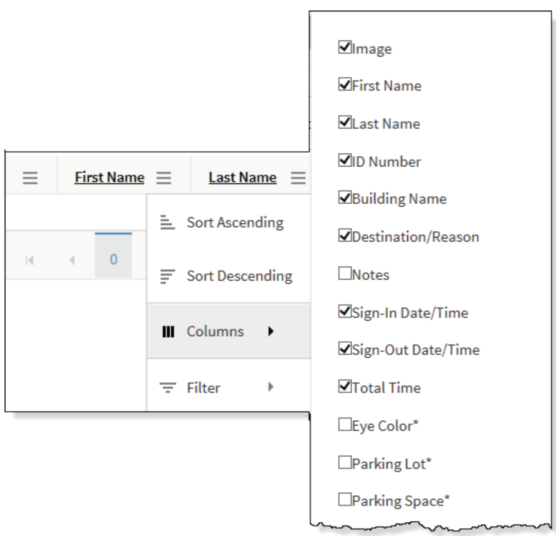
Customize Report Output

Once the report has been generated, you can specify how the information displays.

Specify Columns

You can specify the columns that display in the report:

1. Click the icon next to each column heading and select **Columns**.



- To group based on a column, the column must be visible. Once the grouping has been completed, you can hide the column.
- You can select to display Custom Profile and Custom Sign-In fields. You can move the fields from one column position to another but cannot perform any other functions against these fields such as grouping and sorting. When viewed in the report grid, these fields will have an asterisk at the end of their name.

2. Select the check boxes for the columns you want to display in your report. Clear the check boxes for columns you do not want to display in the report.

Reorder Columns

You can change the order in which the columns display by simply clicking the column name and dragging it to another position on the grid. When you click the column heading, the + displays on the label until you move into the position and release the mouse button.

> **Note** When you drag a column heading, you must stay within the row of column headings. Otherwise, the move functionality is disabled.

Sort Output

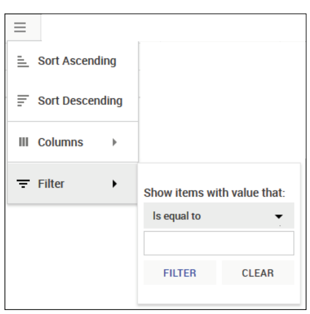
You can sort the output in Ascending or Descending order using one of the following methods:

- Click the column heading to switch between **Ascending** and **Descending** order.
- Click the ≡ icon and select **Sort Ascending** or **Sort Descending**.

Filter Output

You can filter the information that displays in the report based on the specified filter criteria.

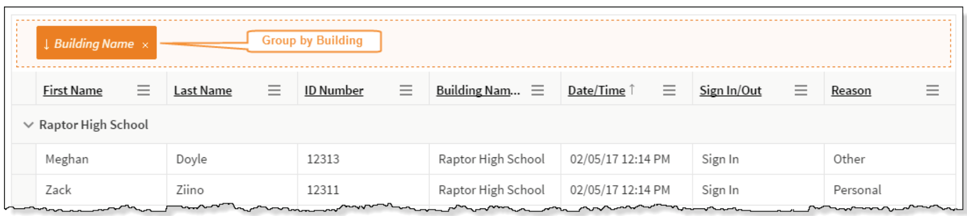
1. Click the ≡ icon and select **Filter**.



2. In the drop-down, select the operator to use (Is equal to, Is not equal to, Starts with, Contains, Does not contain, Ends with) and enter the filter criteria in the text box.
3. Click **Filter**.

Group Output

You can group the report output on most of the columns that display in the report. For example, if you want to view information grouped by building, simply drag the **Building Name** column into the grouping box (dotted frame above columns). The report content displays by the selected grouping.



You can drag multiple column headings into the grouping box to display multi-level groups in the report.

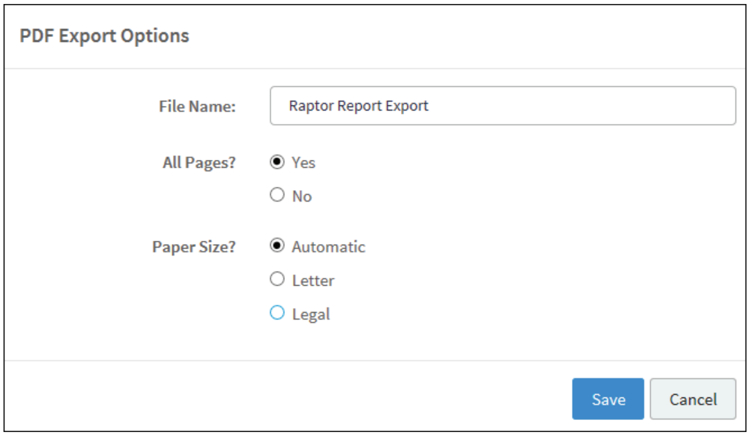
Click the **X** to remove an item in the grouping box.

View Report

You can export the report in Excel or PDF format, and then open the file and print the report.

- Select the icon to generate the report in an Excel file. All the report records will also be exported to the Excel file.
- Select the icon to generate the report in PDF.

When you generate the report in PDF format, you also have the following export options:



- Change the name of the output file (File Name).
- Print only the first page of the report or all pages (All Pages, **Yes**; Only the first page, select **No**).
- Select the paper size on which to print the report (Paper Size). All options format the report in a Landscape orientation. Depending on the number of columns in the report, you can select:
  - Automatic, which scales the size of the report to fit on the default paper size.
  - Letter, which will format the report on an 8-1/2 x 11-inch page.
  - Legal, which will format the report on an 8-1/2 x 14-inch page.

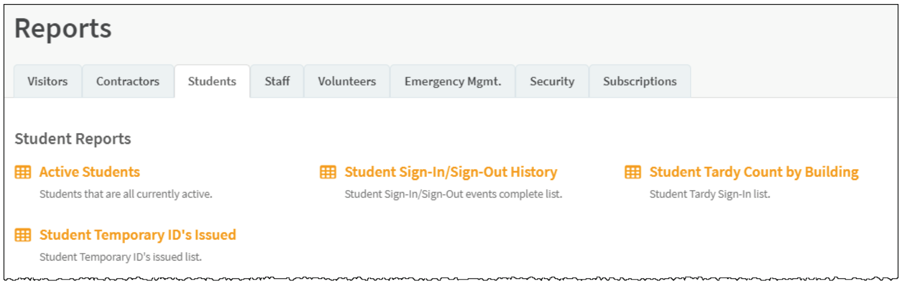
Custom Reports

Users with the *Can Run <Module> Report* permission can create custom reports from the Raptor out-of-the-box reports.

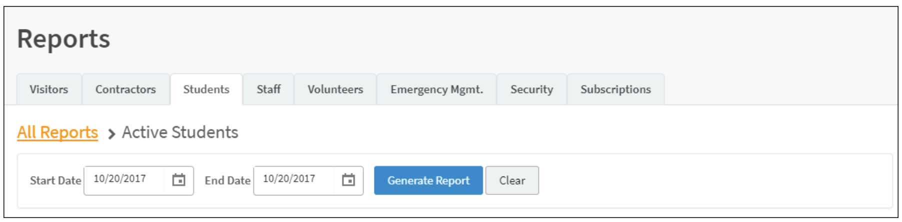
Create Custom Report

Perform the following steps to create a custom report:

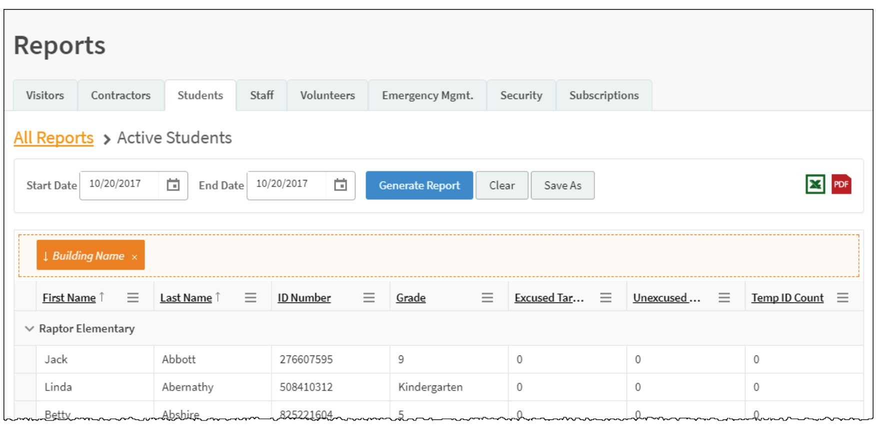
1. Access the report using one of the following methods:
   - Select **Reports** in the navigation menu and click the tab for the type of report you want to run (Visitors, Contractors, Students, Staff, Volunteers or Security).
   - Select **Modules** in the navigation menu and select the module (Visitors, Contractors, Students, Staff or Volunteers) and then click the **Reports** tab in the module workspace.
2. Select the specific building or **All Buildings** from the Building Selector.
3. Select the report that you want to generate.



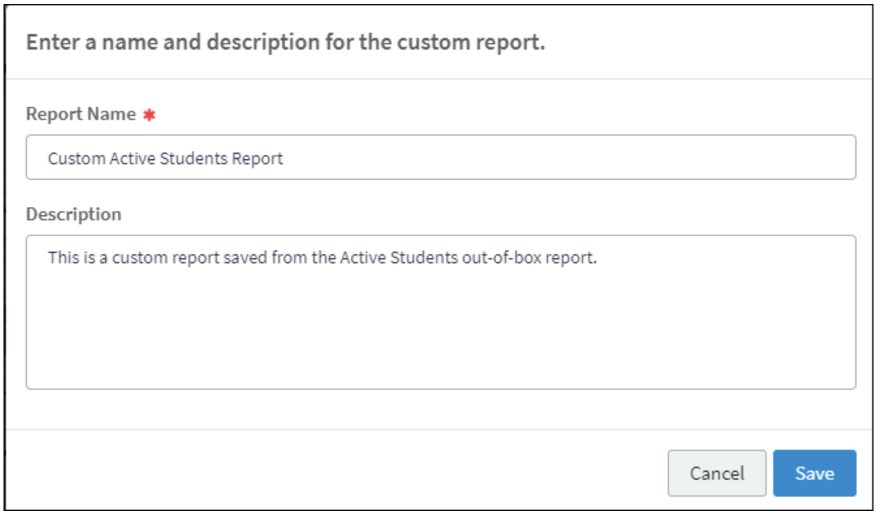
4. Click the icon to select the **Start Date** and **End Date** for the date range to include in the report.



5. Click **Generate Report**.

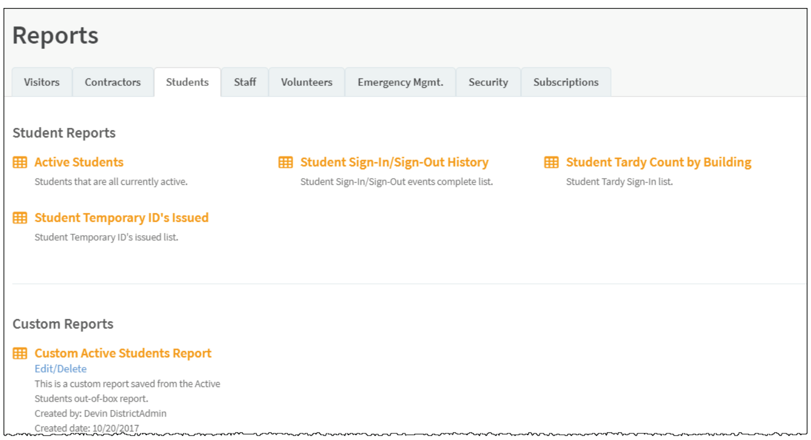


6. Select **Save As** and enter a name for the report (required) and optionally, enter a description of the report.



7. Click **Save**.

   The report displays under **Custom Reports** on the **Reports** workspace.



View and Modify Custom Reports

After a custom report has been created, you can view the reports from the **Custom Reports** area on the **Reports** workspace.

You can also modify the custom report and save it, rename, or save it as another custom report.

Perform the following steps to modify a custom report:

1. Access the report using one of the following methods:
   - Select **Reports** in the navigation menu and click the tab for the type of report you want to run (Visitors, Contractors, Students, Staff, Volunteers, Reunification or Security).
   - Select **Modules** in the navigation menu and select the module (Visitors, Contractors, Students, Staff or Volunteers) and then click the **Reports** tab in the module workspace.
2. If you want to only modify the report name and/or description, in the **Custom Reports** area, click **Edit/Delete**, modify the **Report Name** and/or **Description** and click **Save**. Click **Delete** to remove the custom report.
3. If you want to modify the report content, in the **Custom Reports** area, select the report you want to modify, change the dates if necessary, and click **Generate**.
4. Make your changes to the report, and then click **Save/Delete** and select one of the following options:
   - **Save** – This option will save the changes to the custom report with the same name.
   - **Save As** – This option allows you to save the modified custom report with a different custom report name.

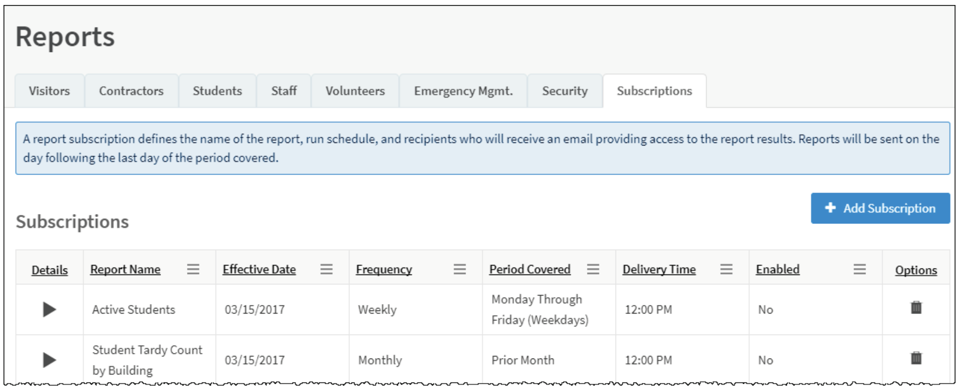
     Enter a new report name (required) and description, and click **Save**.
   - **Delete** – This option deletes the custom report.

     On the confirmation dialog, click **Yes** to continue with the deletion or **No** to cancel the action.

Report Subscriptions

A report subscription defines the name of the report, run schedule, and recipients who will receive an email providing access to the report results.

Users with the *Can Manage Report Subscriptions* can use the **Subscriptions** tab on the **Reports** workspace to add, modify and delete subscriptions to reports.



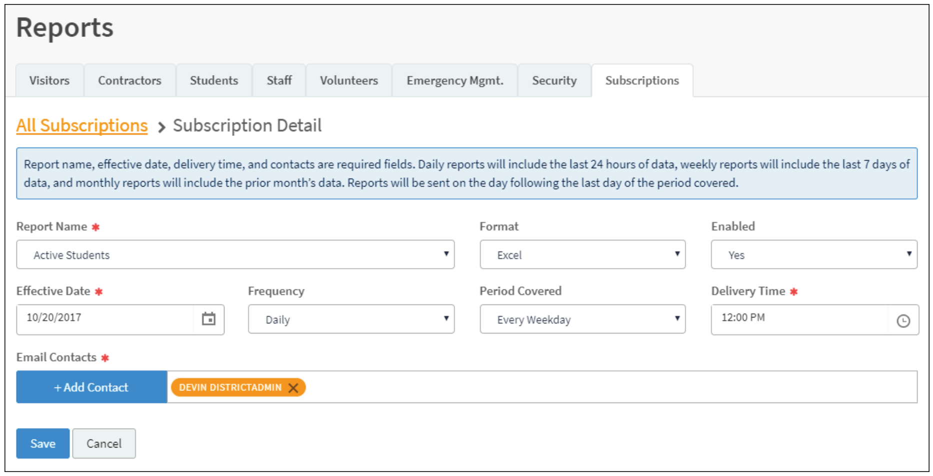
> **Note** Even with the *Can Manage Report Subscriptions* permission, the user must have been granted the appropriate *Can Manage <Module> Reports* permission to be able to create a subscription for the relevant reports. For example, if you want to create a subscription to a visitor report, you must also have the *Can Manage Visitor Reports* permission.

Add Subscription

Perform the following steps to add a report subscription.

1. From the navigation pane, select **Reports** and then click the **Subscriptions** tab.
2. Select the specific building or **All Buildings** from the Building Selector.
3. Click **Add Subscription** to open the **Subscription Detail** workspace.

> **Note** Contacts must be defined before adding report subscriptions.



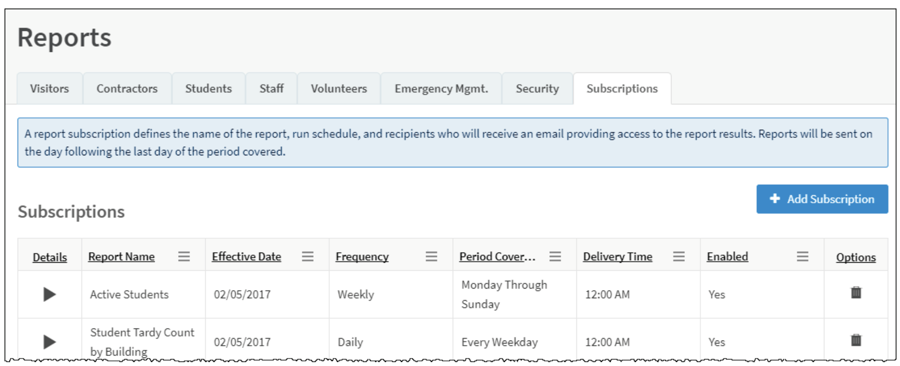
4. Complete the following fields:
   - **Report Name*** – Select the report to which you want to subscribe from the drop-down list. Custom reports will have [Custom] appended to the report name.
   - **Format** – Select the report output format (Excel or PDF) from the drop-down list.
   - **Enabled** – Select **Yes** or **No** to indicate whether this subscription is active. If you want to make the subscription inactive, change this setting to **No**.
   - **Effective Date*** – Click the icon and select the date the subscription begins.
   - **Frequency** – Select how often to run the report (Daily, Weekly or Monthly) from the drop-down list.
   - **Period Covered** – Select the days to be included in the report:
     - If **Daily** is selected as the frequency, choose to run **Every Weekday** (Monday through Friday) or **Every Day** (Monday through Sunday).
     - If **Weekly** is selected as the frequency, choose the date range during the week:
       - Monday Through Friday (Weekdays)
       - Monday Through Saturday
       - Tuesday Through Monday
       - Wednesday Through Tuesday
       - Thursday Through Wednesday
       - Friday Through Thursday

        - Saturday Through Friday
        - Sunday Through Saturday
    - If **Monthly** is selected, the frequency is Prior Month.
  - **Delivery Time*** – Click the icon and select the time to run and deliver the report to the Email recipients.
  - **Email Contacts*** – Click **Add Contacts** and select the names of the people who should receive the report.
5. Click **Save**.

View and Modify Subscriptions

You can view and modify report subscriptions from the **Subscriptions** tab.

1. From the navigation pane, select **Reports** and then click the **Subscriptions** tab.
2. View the subscriptions that have been added in the **Subscriptions** grid.



   The name of the report, how often it runs, the day it runs, the time it is delivered and whether the subscription is enabled (active) display in the grid.

3. If you want to modify the subscription, click the icon to open the **Subscription Detail** workspace.
4. Modify any of the information and then click **Save**.

Delete Subscription

Perform the following steps to delete a subscription:

1. From the navigation pane, select **Reports** and then click the **Subscriptions** tab.
2. Locate the subscription in the **Subscriptions** grid and click the icon.
3. On the confirmation dialog, click **OK**.

Visitor Reports

You can access Visitor reports from the **Visitors** workspace or the **Reports** workspace:

- To access from the **Visitors** workspace, select **Modules > Visitors** in the navigation menu and then click the **Reports** tab.
- To access from the **Reports** workspace, select **Reports** in the navigation menu and then click the **Visitors** tab.

The following Visitor reports are available:

- **Visitor Details** – Visitor sign-in and sign-out details, including photo, building name, and total time.
- **Visitor Sign-In History by Destination** – Visitor sign-in and sign-out details grouped by destination/reason.
- **Visitor Sign-In History by Date** – Visitor sign-in and sign-out details grouped by sign-in date.
- **Visitor Sign-In History by Building** – Visitor sign-in and sign-out details grouped by building and includes destination/reason.

Contractor Reports

You can access Contractor reports from the **Contractors** workspace or the **Reports** workspace:

- To access from the **Contractors** workspace, select **Modules > Contractors** in the navigation menu and then click the **Reports** tab.
- To access from the **Reports** workspace, select **Reports** in the navigation menu and then click the **Contractors** tab.

The following Contractor reports are available:

- **Contractor Details** – Contractor sign-in and sign-out details, including company, building name, and total time, and photo.
- **Contractor Sign-In History by Destination** – Contractor sign-in and sign-out details grouped by destination/reason.
- **Contractor Sign-In History by Date** – Contractor sign-in and sign-out details grouped by sign-in date.
- **Contractor Sign-In History by Building** – Contractor sign-in and sign-out details grouped by building and includes destination/reason.

Student Reports

You can access Student reports from the **Students** workspace or the **Reports** workspace:

- To access from the **Students** workspace, select **Modules > Students** in the navigation menu and then click the **Reports** tab.
- To access from the **Reports** workspace, select **Reports** in the navigation menu and then click the **Students** tab.

The following Student reports are available:

- **Active Students** – All students who are currently active, including student ID, grade, excused and unexcused tardy counts, and number of temporary IDs issues.
- **Student Temporary IDs Issued** – All students who have been issued a temporary ID, including date and time.
- **Student Tardy Count by Building** – All students who have signed in tardy, including the total excused or unexcused tardy counts.
- **Student Sign-In/Sign-Out History** – A history of all student sign-in and sign-out instances, including the reason.

Staff Reports

You can access Staff reports from the **Staff** workspace or the **Reports** workspace:

- To access from the **Staff** workspace, select **Modules > Staff** in the navigation menu and then click the **Reports** tab.
- To access from the **Reports** workspace, select **Reports** in the navigation menu and then click the **Staff** tab.

The following Staff reports are available:

- **Staff Attendance by Date** – Staff sign-in and sign-out details grouped by sign-in date; also includes ID number, building, destination and total time.
- **Staff Attendance by Name** – Staff sign-in and sign-out details grouped by name; also includes total time and building name.
- **Staff Not Signed In by Date** – Staff that have not signed in grouped by sign-in date; also includes ID number and building name.
- **Staff Signed In by Building** – Staff sign-in and sign-out details grouped by building; also includes destination/reason.

Volunteer Reports

You can access Volunteer reports from the **Volunteers** workspace or the **Reports** workspace:

- To access from the **Volunteers** workspace, select **Modules > Volunteers** in the navigation menu and then click the **Reports** tab.
- To access from the **Reports** workspace, select **Reports** in the navigation menu and then click the **Volunteers** tab.

The following Volunteer reports are available:

- **Active Volunteers** – Volunteer profile information, including photo for all volunteers with an *Active* status.
- **Approved Applications** – Volunteer applications that have been approved.
- **Top Volunteers by Building** – Volunteers grouped by buildings and sorted by greatest total time.
- **Volunteer Applications by Status and Building** – Volunteer applications grouped by status and building.
- **Volunteer Hours by Function and Building** – Volunteer hours grouped by function and building.
- **Volunteer Sign-In History by Building** – Volunteer sign in history grouped by building.

Raptor Reunification Reports REU

You can access Raptor Reunification reports from the **Reports** workspace. Select **Reports** in the navigation menu and then click the **Emergency Mgmt** tab.

The following Reunification reports are available:

- **Reunification - All Activities by Building** – Emergency and drill activity organized by building.
- **Reunification - Drills by Building** – Drill activity and details organized by building.
- **Reunification - Emergencies by Building** – Emergency incident activity by building.
- **Reunification - No Drills Performed by Building** – List of buildings with no drill activity and date of most recent drilled performed.

Security Reports

You can access Security reports from the **Reports** workspace. Select **Reports** in the navigation menu and then click the **Security** tab.

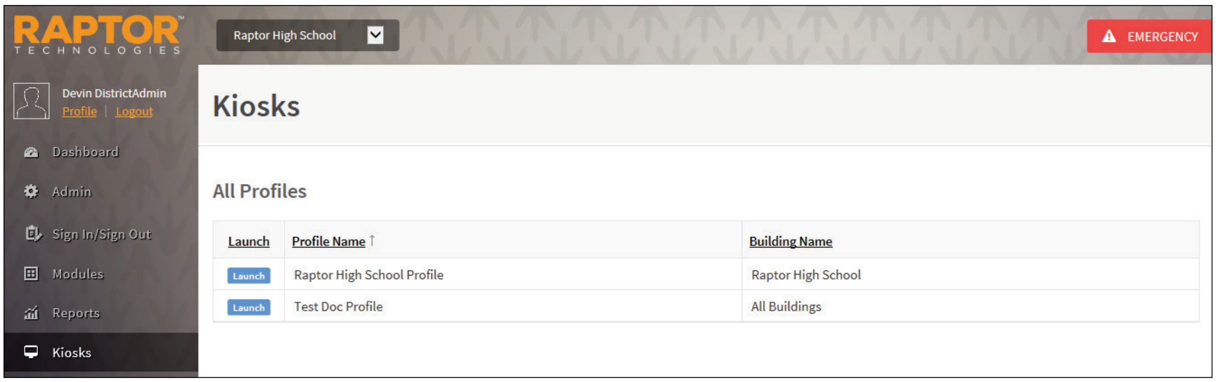
The following Security reports are available:

- **Sex Offenders Logged** – Sign-in and sign-out details for visitors, contractors, guardians and volunteers who were a possible match to an offender alert. Only users with the *Can Run Offender Reports* permission can run this report.
- **Custom Alerts Issued** – Sign-in and sign-out details for visitors, contractors, students and volunteers who were a possible match to a custom alert. Only users with the *Can Run Offender Reports* permission can run this report.
- **Who's in the Building** – A report of all visitors, contractors, staff and volunteers currently signed in and students that have signed out.
- **Alert Mismatches** – A report that lists the possible alerts that resulted in a mismatch (for example, when a possible offender or custom alert was generated but the user selected Not a Match). Only users with the *Can Run Offender Reports* permission can run this report.

Using Kiosks

Users with the *Can Launch Kiosks* permission can launch the kiosk for a specific building from the Kiosk Workspace. To access this workspace, select **Kiosks** in the navigation menu.

> **Note** You must select a building in the Building selector to launch the Kiosk.

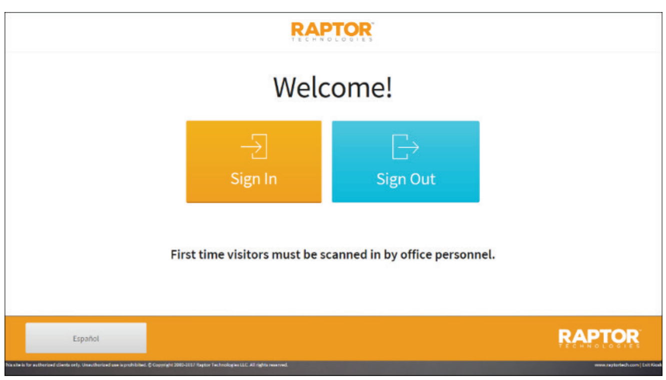


Launching Kiosk

Perform the following steps to launch a Kiosk:

1. From the navigation menu, select **Kiosks** and then select the building from the Building Selector.
2. On the **Kiosk All Profiles** workspace, click **Launch** for the specific Kiosk Profile you want to open.

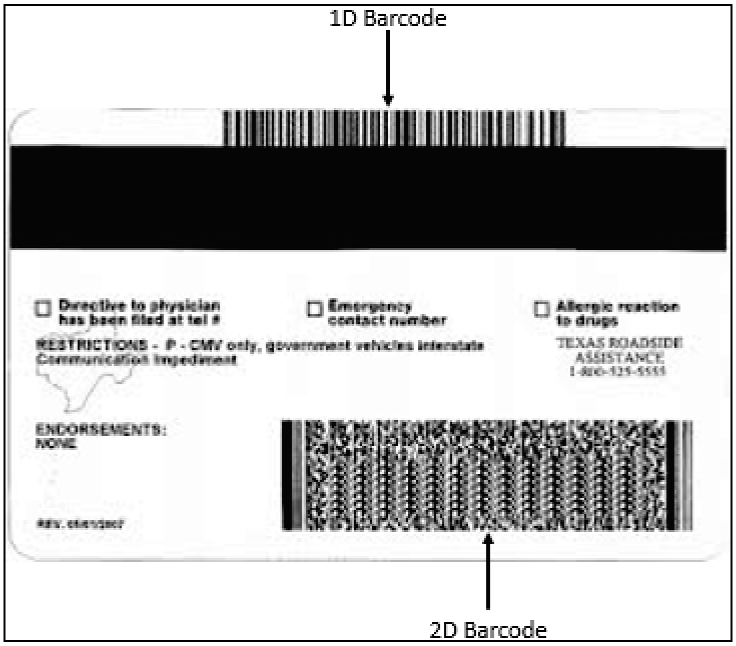
   The Kiosk Welcome screen displays.

3. If you want to display the Kiosk in Spanish, click the **Español** button.

Sign In/Sign Out

You can use the Kiosk to sign in and sign out visitors, students, staff, contractors and volunteers. If the kiosk is equipped with a barcode scanner, you can use your student ID, staff ID, district-issued ID or government-issued ID to sign in and sign out of Raptor.



1D Barcode

A 1D barcode is typically found on a student ID, staff ID or driver license and can hold a maximum of 80 characters of data. Normally, a student and staff ID will encode that person's district ID number into a 1D barcode. A driver license will encode the license number and, in some cases, the license expiration date or the person's date of birth in the 1D barcode.

The information encoded on a 1D barcode can be entered into the Assigned ID field for visitors, contractors, and volunteers, or as the ID Number for students and staff members.

2D Barcode

A 2D barcode is typically found on a driver license or other government-issued ID and can hold up to 2000 characters of data. The person's first name, last name, date of birth, license number and much more can be encoded on a 2D barcode.

Raptor can read the information encoded on a 2D barcode and match it to the first name, last name, date of birth, and license number of a person in the Raptor System.

Both 1D and 2D barcodes can be used by the Raptor System to streamline the process of signing in or out through the Front Desk or a self-serve kiosk.

The following table provides a summary of which sign-in and sign-out methods are available for each module.

Module	Type Name or ID Number	Scan 1D Barcode	Scan 2D Barcode	Scan 1D Barcode on Badge (Sign Out)
Visitor Sign In/Sign Out	Yes (Name)	Yes*	Yes*	Yes**
Contractor Sign In/Sign Out	No	Yes*	Yes*	Yes**
Student Sign In/Sign Out	Yes (ID)	Yes	No	No
Student Sign In/Sign Out (By Guardian)	Yes (Name)	No	No	No
Staff Sign In/Sign Out	Yes (ID)	Yes	No	No
Volunteer Sign In/Sign Out	Yes (Name)	Yes*	Yes*	Yes**
*The *Enable 1D and 2D Barcode Support* feature must be enabled.				
** The *Display 1D Barcode on Badge* feature must be enabled to print the 1D barcode on the badge, and the *Enable 1D and 2D Barcode Support* feature must be enabled to sign out using the barcode on the badge.				

Sign In Visitors

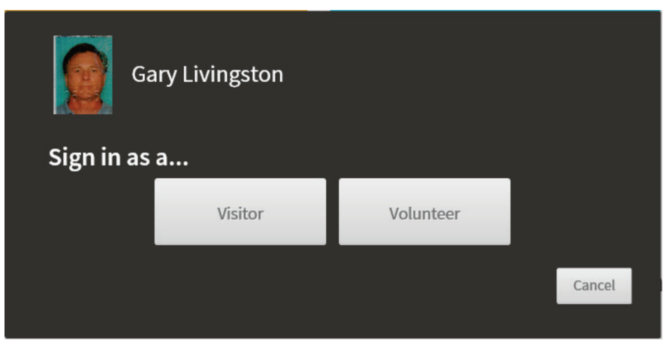
Visitors can sign in via the kiosk using one of the following methods:

- Scan the 1D barcode on their district-issued ID or government-issued ID
- Scan the 2D barcode on their government-issued ID
- Type their name

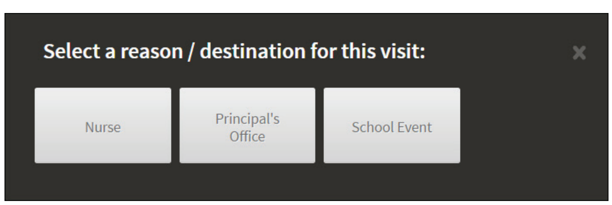
Scan 1D/2D Barcode – Welcome Screen

If a visitor has an official record in the Raptor system and a unique Assigned ID, they can sign in via the kiosk by scanning the 1D barcode on their district-issued ID or government-issued ID. A visitor can also sign in via the kiosk by scanning the 2D barcode on their government-issued ID.

1. On the **Kiosk Welcome** screen, wave the district-issued ID or government-issued ID under the scanner.
2. If the 1D barcode value is assigned to one or more profiles of a person in the Raptor system or the 2D barcode value matches a person in the Raptor system, a dialog displays the person and associated profiles (for example, Visitor and Volunteer). Select the profile to be used for sign in.



3. On the **Select a Reason** dialog, click the reason for sign in.



4. Click **OK** on the *Sign In Successful* dialog and a badge is printed.

Step-by-Step Sign-In – Scan 1D/2D Barcode or Type Name

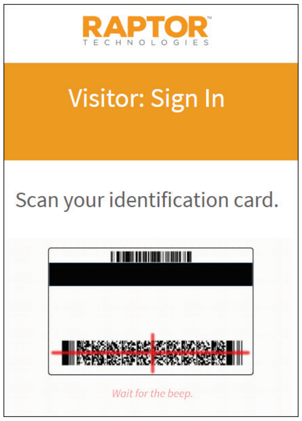
1. On the **Kiosk Welcome** screen, click **Sign In** and then select **Visitor**.

2. Select a sign in method: **Type in Name** or **Scan License**.

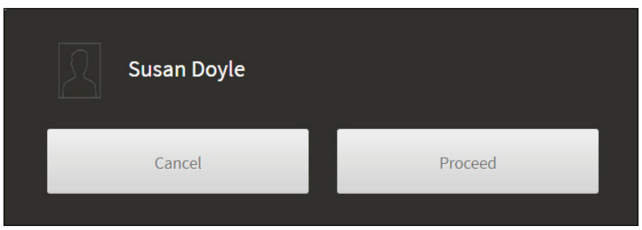
> **Note** The visitor must have previously been scanned into the Raptor system or have an official record to scan license.

3. If you selected to **Type in Name**, use the keyboard to enter your name and then click **Find**.

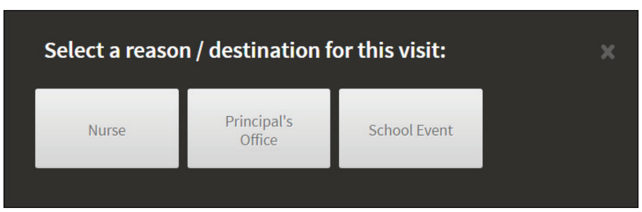
If you selected to **Scan License**, scan the 1D (if configured) or 2D barcode on the back of your government-issued ID.



4. On the search results dialog, click **Proceed**.



5. On the **Select a Reason** dialog, click the reason for sign in.



6. Click **OK** on the *Sign In Successful* dialog and a badge is printed, if configured.

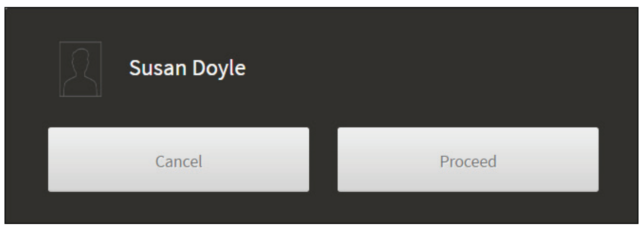
Sign Out Visitors

Visitors can sign out via the kiosk using one the following methods:

- Scan the 1D barcode on their district-issued ID, government-issued ID or printed badge
- Scan the 2D barcode on their government-issued ID
- Type name

Scan 1D/2D Barcode – Welcome Screen

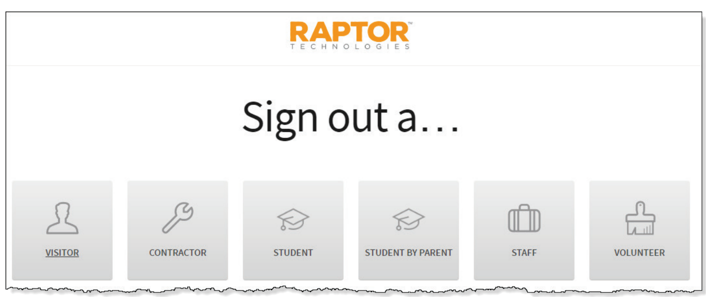
1. On the **Kiosk Welcome** screen, wave your district-issue ID, government-issued ID or your printed badge with 1D or 2D barcode under the scanner.
2. On the search results dialog, click **Proceed**.



3. Click **OK** on the *Sign out successful* message dialog to complete the sign-out process.

Step-by-Step Sign-In – Scan 1D/2D Barcode or Type Name

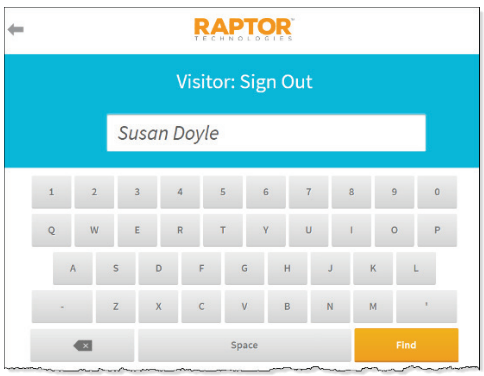
1. On the **Kiosk Welcome** screen, click **Sign Out** and then select **Visitor**.



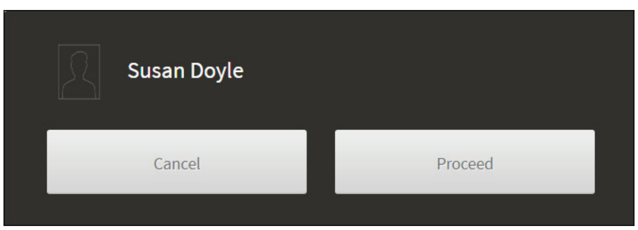
2. Select a sign out method: **Type in Name** or **Scan License**. If the printed badge includes a barcode, select **Scan License**.

> **Note** The visitor must have previously been scanned into the Raptor system with the government-issued ID.

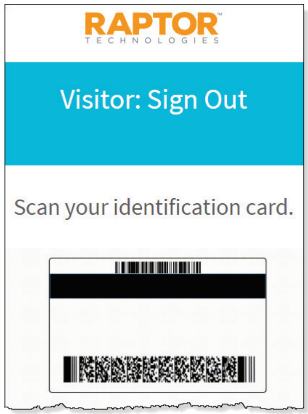
3. If you selected to **Type in Name**, use the keyboard to enter your name and then click **Find**.



On the search results dialog, click **Proceed** or select your name if there are multiple names returned.



If you selected to **Scan License**, scan the 1D (if configured) or 2D barcode on the back of your government-issued ID or the barcode on your visitor badge.



4. Click **OK** on the *Sign out successful* message dialog to complete the sign-out process.

Sign In Contractors

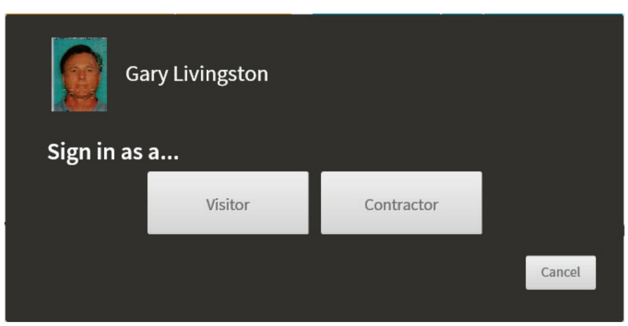
Contractors can sign in via the kiosk using one of the following methods:

- Scan the 1D barcode on their district-issued ID or government-issued ID
- Scan the 2D barcode on their government-issued ID

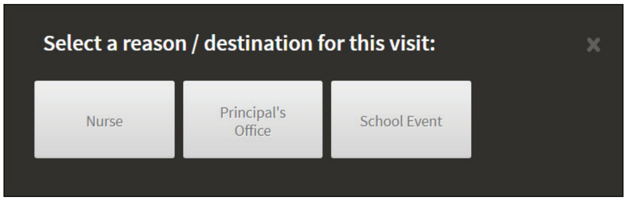
Scan 1D/2D Barcode – Welcome Screen

If a contractor has an official record in the Raptor system and a unique Assigned ID, they can sign in via the kiosk by scanning the 1D barcode on their district-issued ID or government-issued ID. A contractor can also sign in via the kiosk by scanning the 2D barcode on their government-issued ID.

1. On the **Kiosk Welcome** screen, wave the district-issue ID or government-issued ID under the scanner.
2. If the 1D barcode value is assigned to one or more profiles of a person in the Raptor system or the 2D barcode value matches a person in the Raptor system, a dialog displays the person and associated profiles (for example, Visitor and Contractor). Select the profile to be used for sign in.



3. On the **Select a Reason** dialog, click the reason for sign in.



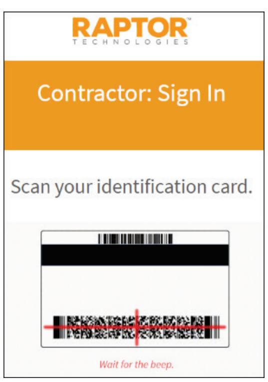
4. Click **OK** on the *Sign In Successful* dialog and a badge is printed.

Step-by-Step Sign-In – Scan 1D/2D Barcode

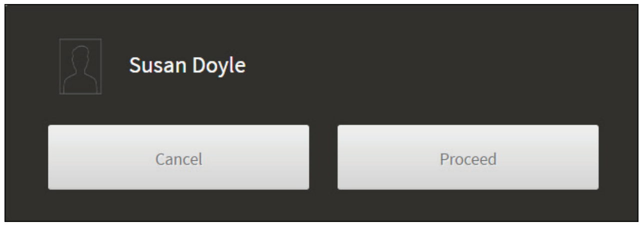
Contractors must have previously been scanned into the Raptor system with a government-issued ID to sign in via the Kiosk by scanning the 1D or 2D barcode on their ID.

1. On the **Kiosk Welcome** screen, click **Sign In** and then select **Contractor**.

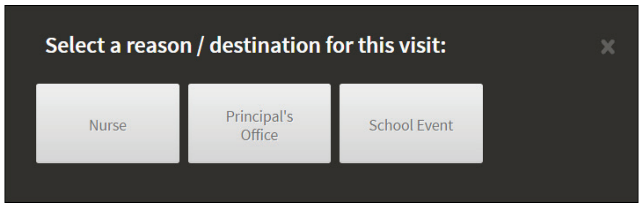
2. Scan the 1D (if configured) or 2D barcode on the back of your government-issued ID.



3. On the search results dialog, click **Proceed**.



4. On the **Select a Reason** dialog, click the reason for sign in.



5. Click **OK** on the *Sign In Successful* dialog and a badge is printed.

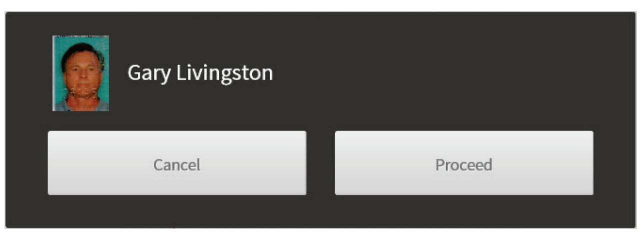
Sign Out Contractors

Contractors can sign out via the kiosk using one the following methods:

- Scan the 1D barcode on their district-issued ID, government-issued ID or printed badge.
- Scan the 2D barcode on their government-issued ID

Scan 1D/2D Barcode – Welcome Screen

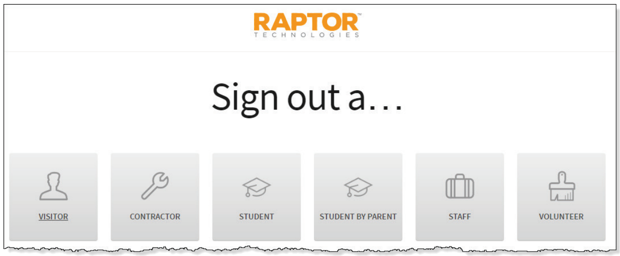
1. On the **Kiosk Welcome** screen, wave your district-issued ID, government-issued ID, or printed badge with 1D barcode under the scanner.



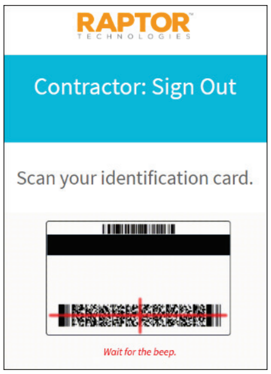
2. On the search results dialog, click **Proceed** to sign out.
3. Click **OK** on the *Sign out successful* message dialog to complete the sign-out process.

Step-by-Step Sign-Out – Scan 1D/2D Barcode

1. On the **Kiosk Welcome** screen, click **Sign Out** and then select **Contractor**.



2. Scan your printed badge, district-issued ID or government-issued ID.



3. On the search results dialog, click **Proceed** to sign out.
4. Click **OK** on the *Sign out successful* message dialog to complete the sign-out process.

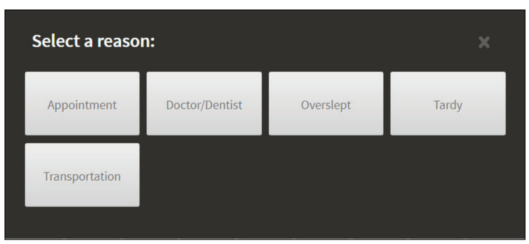
Sign In Student

Students can sign in via the kiosk by scanning their student ID or entering their student ID number.

Scan 1D Barcode

1. On the **Kiosk Welcome** screen, scan the 1D barcode on the back of your student ID using the barcode scanner.

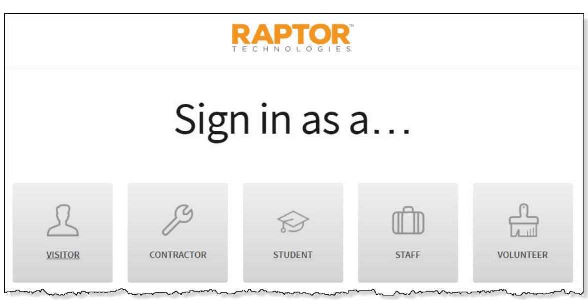
2. On the search results dialog, click **Sign In**.



3. On the **Select a Reason** dialog, click the reason for sign in.
4. Click **OK** on the *Badge is printing* dialog (if printing enabled) or on the *Sign in successful* dialog (if printing disabled).

Enter Student ID

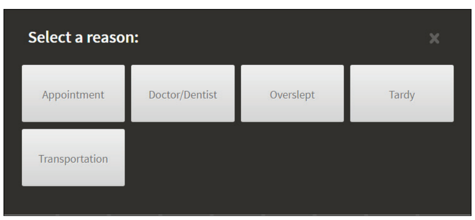
1. On the **Kiosk Welcome** screen, click **Sign In** and select **Student**.



2. Enter the **Student ID** number in the text box and click **Find**.

3. On the search results dialog, click **Proceed**.

4. On the **Select a Reason** dialog, click the reason for sign in.



5. Click **OK** on the *Sign In Successful* dialog and a tardy pass is printed.

Sign Out Student (Self Sign Out)

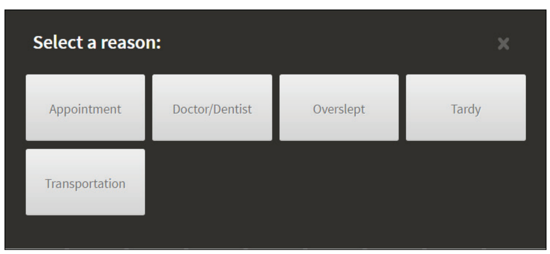
Students can sign out via the kiosk by scanning their student ID or by entering their student ID number.

> **Note** Students must have **Allow Self Sign-Out** set to **Yes** in their record to use the self-sign-out feature from the kiosk.

Scan 1D Barcode

1. On the **Kiosk Welcome** screen, scan the 1D barcode on the back of your student ID using the barcode scanner.

2. On the search results dialog, click **Sign Out**.

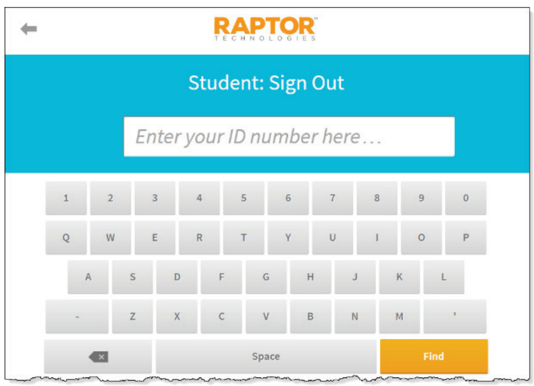


3. On the **Select a Reason** dialog, click the reason for sign out.
4. Click **OK** on the *Sign out successful* dialog and an early dismissal pass is printed (if printing is enabled at the Kiosk).

Enter Student ID

1. On the **Kiosk Welcome** screen, click **Sign Out** and select **Student**.

2. Enter the **Student ID** number in the text box and click **Find**.



3. On the search results, click **Proceed**.

4. On the **Select a Reason** dialog, click the reason for sign out.

5. Click **OK** on the *Sign Out Successful* dialog and an early dismissal pass is printed.

Sign Out Student By Parent

Parents or guardians can sign out students via the kiosk by entering their name.

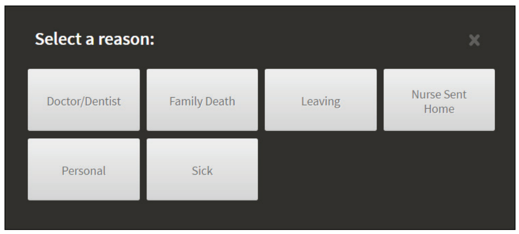
1. On the **Kiosk Welcome** screen, click **Sign Out** and select **Student By Parent**.

2. Enter the parent's **First Name** and **Last Name** and then click **Find**.

3. Click **Proceed** on the search results dialog that displays the parent's or authorized person's name.

4. The search results display the student's name that you are signing out. Click the **Student's name** to continue.

5. On the **Select a Reason** dialog, click the reason for sign out.



6. Click **OK** on the *Sign Out Successful* dialog and an early dismissal pass is printed.

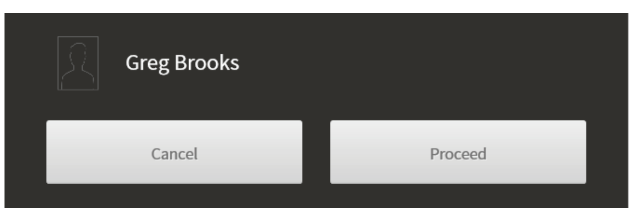
Sign In Staff

Staff members can sign in via the kiosk by scanning staff ID or entering their staff ID number.

Scan 1D Barcode

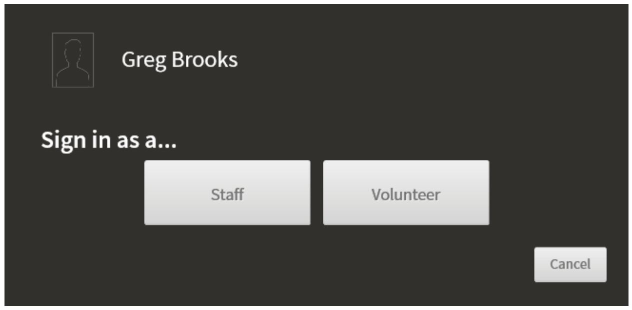
1. On the **Kiosk Welcome** screen, scan the 1D barcode on the back of your staff ID using the barcode scanner.
2. Perform one of the following to proceed, depending on the staff member's profile:

   If the staff member has only one profile, click **Proceed**.

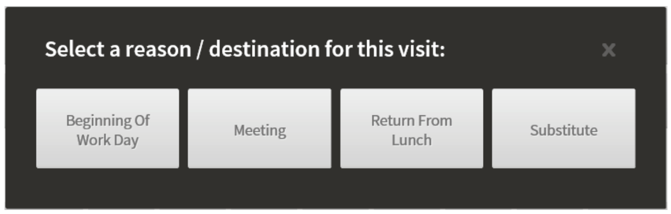


> **Note** If the **Confirm Staff Member Identify** setting is disabled, this dialog does not display.

If the staff member has multiple profiles, click **Staff**.



3. If Sign-In Reason is enabled, on the **Select a Reason** dialog, click the reason for sign in.

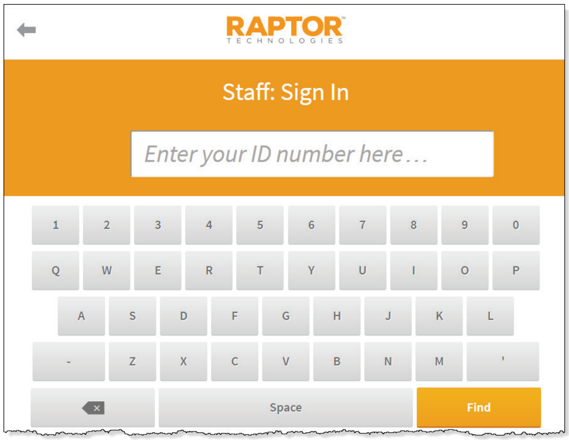


4. Click **OK** on the *Sign in successful* dialog.

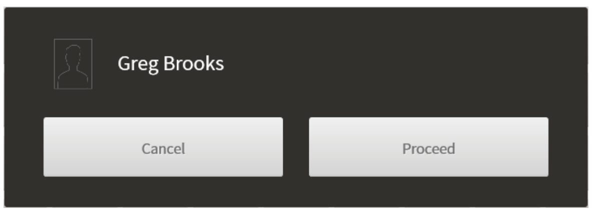
Enter ID

1. On the **Kiosk Welcome** screen, click **Sign In** and the select **Staff**.

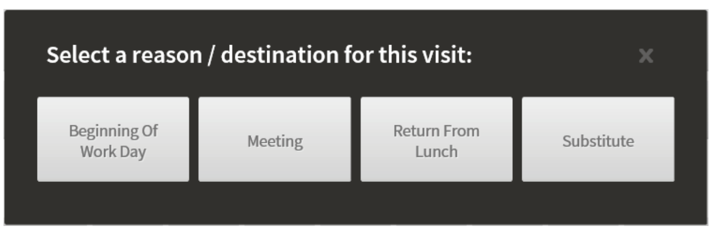
2. Enter the **Staff ID** number in the text box and click **Find**.



3. On the search results dialog, click **Proceed** to sign in.



4. If Sign-In Reason is enabled, on the **Select a Reason** dialog, click the reason for sign in.



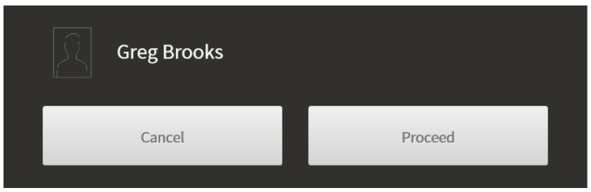
5. Click **OK** on the *Sign in successful* dialog.

Sign Out Staff

Staff members can sign out via the kiosk by scanning staff ID or entering their staff ID number.

Scan ID

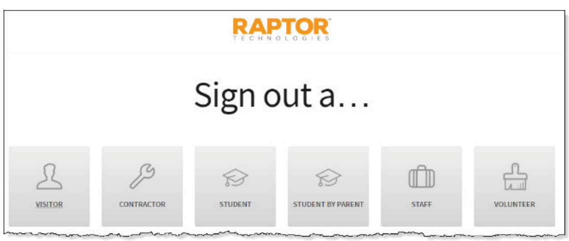
1. On the **Kiosk Welcome** screen, scan the barcode on your staff ID using the barcode scanner.
2. On the search results dialog, click **Proceed**.



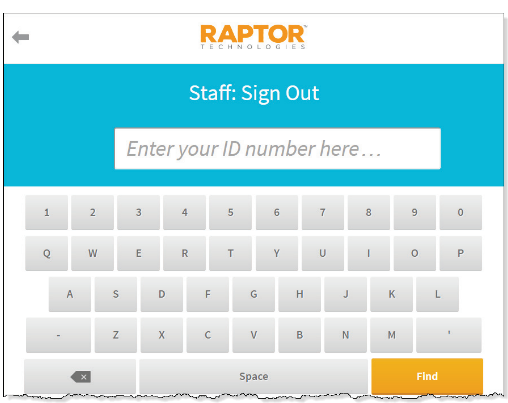
3. On the **Select a Reason** dialog, click the reason for sign out (if staff are required to provide a sign-out reason).
4. Click **OK** on the *Sign out successful* dialog.

Enter ID

1. On the **Kiosk Welcome** screen, click **Sign Out** and then select **Staff**.



2. Enter the **Staff ID** number in the text box and click **Find**.



3. On the search results dialog, click **Proceed** to sign out.

4. Click **OK** on the *Sign out successful* dialog.

Sign In Volunteers

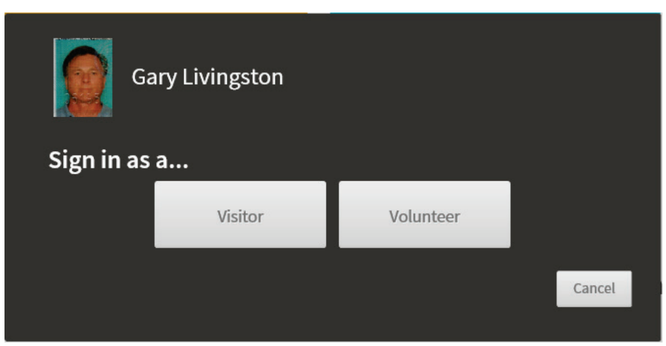
Volunteers can sign in via the kiosk using one of the following methods:

- Scan the 1D barcode on their district-issued ID or government-issued ID
- Scan the 2D barcode on their government-issued ID
- Type their name

Scan 1D/2D Barcode – Welcome Screen

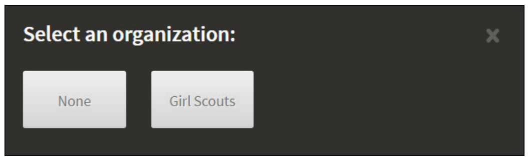
If a volunteer has an official record in the Raptor system and a unique Assigned ID, they can sign in via the kiosk by scanning the 1D or 2D barcode on their district-issued ID or government-issued ID.

1. On the **Kiosk Welcome** screen, wave the district-issue ID or government-issued ID under the scanner.
2. If the 1D or 2D barcode value is assigned to two or more profiles in the Raptor system, a dialog displays the profiles (for example, Visitor and Volunteer). Select the profile to be used for sign in.



3. On the **Select a Function** dialog, click the function for which the volunteer is signing in.

4. If Require Organization is enabled, on the **Select an Organization** dialog, click the organization the volunteer is associated with.



5. Click **OK** on the *Sign In Successful* dialog and a badge is printed.

Step-by-Step Sign-In – Scan 1D/2D Barcode or Type Name

Volunteers can sign in via the kiosk by scanning the 1D or 2D barcode that is on their government-issued ID or by entering their name.

> **Note** If *Activate Secure Kiosk* is enabled, volunteers can only sign in by scanning the 1D or 2D barcode on their government-issued ID.

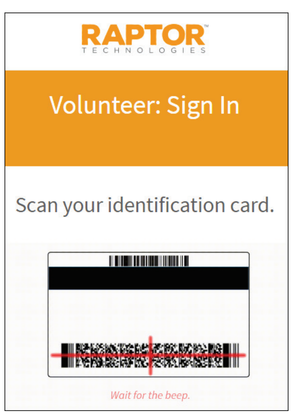
1. On the **Kiosk Welcome** screen, click **Sign In** and then select **Volunteer**.

2. Select a sign in method: **Type in Name** or **Scan License**.

> **Note** The volunteer must have previously been scanned into the Raptor system or have an official record to scan license.

3. If you selected to **Type in Name**, use the keyboard to enter your name and then click **Find**.

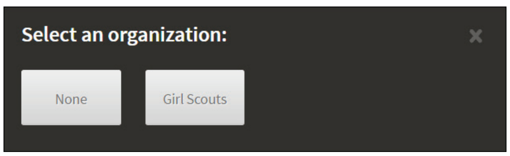
If you selected to **Scan License**, scan the 1D or 2D barcode on the back of your district-issued or government-issued ID.



4. On the search results dialog, click **Proceed**.

5. On the **Select a Function** dialog, click the function for which the volunteer is signing in.

6. If Require Organization is enabled, on the **Select an Organization** dialog, click the organization the volunteer is associated with.



7. Click **OK** on the *Sign In Successful* dialog and a badge is printed.

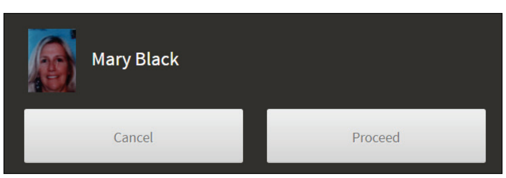
Sign Out Volunteers

Volunteers can sign out via the kiosk using one the following methods:

- Scan the 1D barcode on the district-issued ID, government-issued ID or their printed badge
- Scan the 2D barcode on their government-issued ID
- Type name

Scan 1D/2D Barcode – Welcome Screen

1. On the **Kiosk Welcome** screen, wave your district-issue ID, government-issued ID or your printed badge with 1D or 2D barcode under the scanner.
2. On the search results dialog, click **Proceed**.



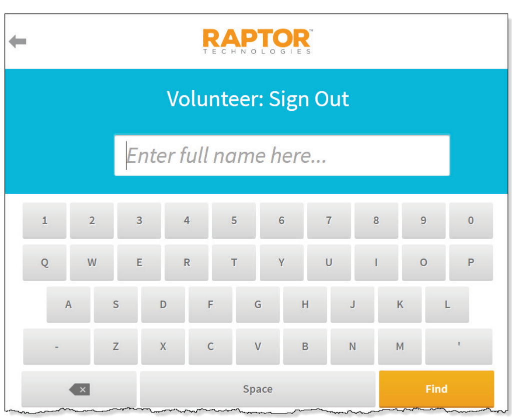
3. Click **OK** on the *Sign out successful* message dialog to complete the sign-out process.

Step-by-Step Sign Out -- Scan 1D/2D Barcode or Type Name

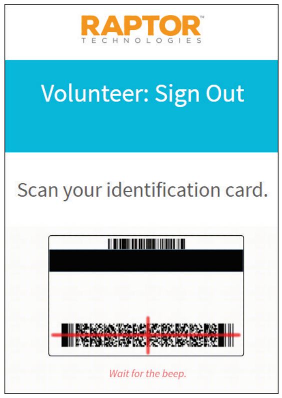
1. On the **Kiosk Welcome** screen, click **Sign Out** and then select **Volunteer**.

2. Select a sign out method: **Type in Name** or **Scan License**. If the printed badge includes a barcode, select **Scan License**.

3. If you selected to **Type in Name**, use the keyboard to enter your name and then click **Find**.



If you selected to **Scan License**, scan the barcode on the back of your government-issued ID or the barcode on your printed badge.



4. On the search results dialog, click **Proceed**.

5. Click **OK** on the *Sign out successful* message dialog to complete the sign-out process.

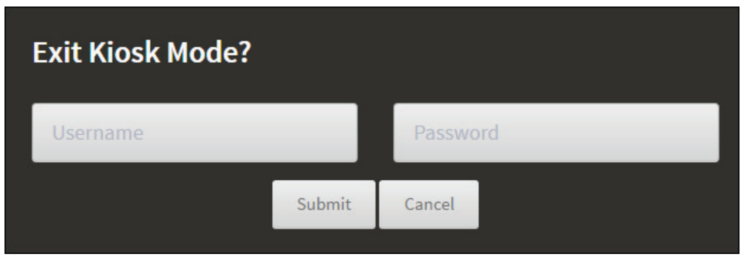
Exiting Kiosk

> **Note** Any Raptor user can exit the Kiosk, however, only users with the *Can Manage Kiosks* or *Can Launch Kiosks* permission can exit the Kiosk and return to the **Kiosk** workspace.

1. To exit the Kiosk, click the **Exit Kiosk** link in the lower right corner of the Kiosk Welcome page.

   The Exit Kiosk Mode dialog displays.

2. Enter your **Username** and **Password**, and then click **Submit**.

   If you enter a **Username** and **Password** that do not have permissions to launch or manage the Kiosk, you will be returned to the **Raptor Login** screen.

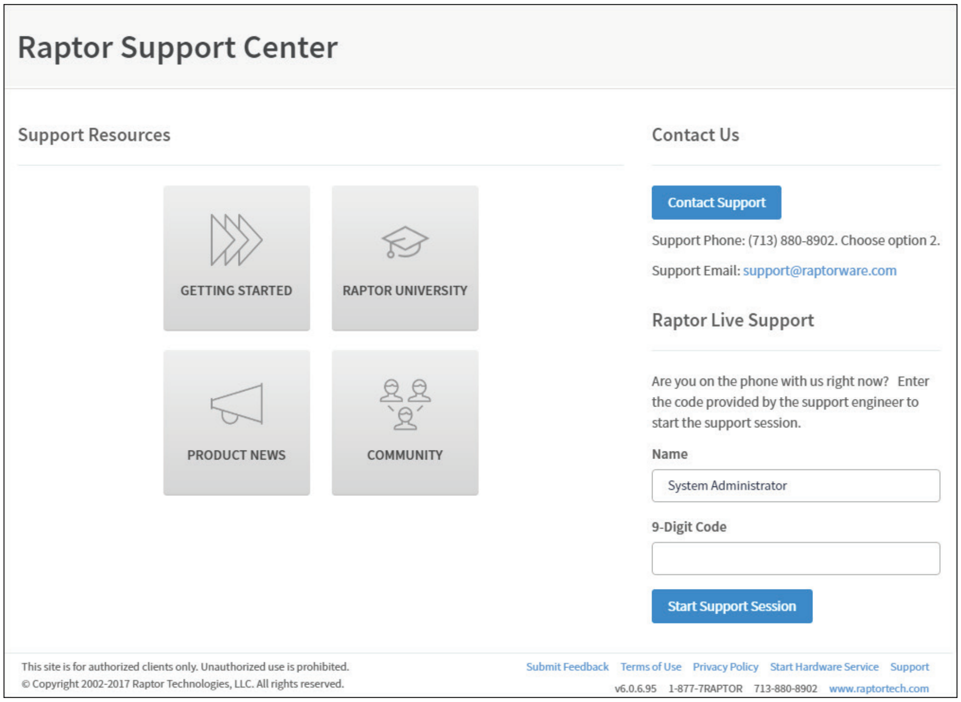
   Enter the **Username** and **Password** for an account that does have permissions to exit the Kiosk and then click **Log In to Raptor**.

   or

   Click **Go to Dashboard** to be taken back to the **Dashboard** workspace in the Raptor Console.

Raptor Support

The **Support** menu item launches the **Raptor Support Center** where you can find Self Help Resources for using Raptor.



Contact Us Via Email

To contact the Raptor Support team through email:

1. Click **Send Email To Support**.
2. Complete the information on the form and then click **Send**.

Self-Help Resources

Raptor Self Help Resources are available to enhance your understanding and use of the product:

- **Getting Started** – Supported Environments, Raptor Hardware Service Installation, and Raptor CLI Import Tool
- **Raptor University** – Documentation and Raptor University Training Courses
- **Product News** – Release Notes and Recorded Release Webinars
- **Community** – Submit your feedback and future user forum

Online Volunteer Application

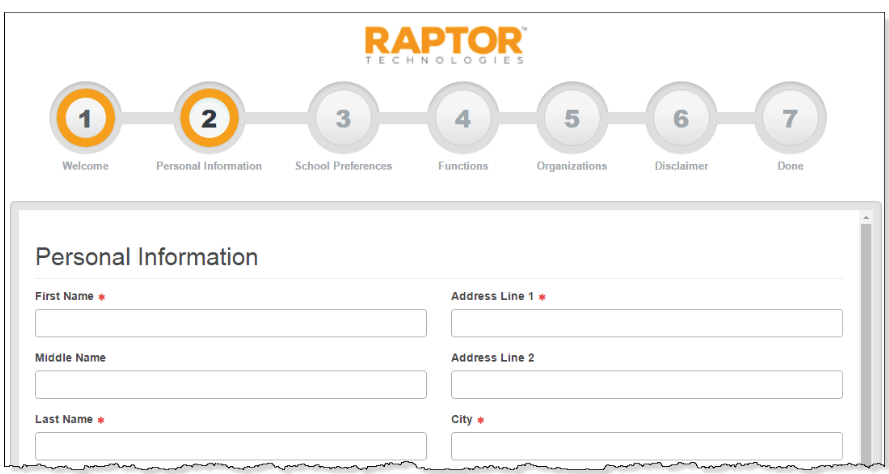
The Raptor online volunteer application is normally accessible from your district's website or sent to you via email. Volunteer applicants must complete this application to be approved as a volunteer for school events and activities.

1. Click the link for the online volunteer application.

2. On the **Welcome** screen, review the introductory information that displays and then click **Next** to continue.

   If you want to exit the application, click **Cancel Application**.

3. On the **Personal Information** screen, complete the information on the screen.



The fields marked with an asterisk (*) are required.

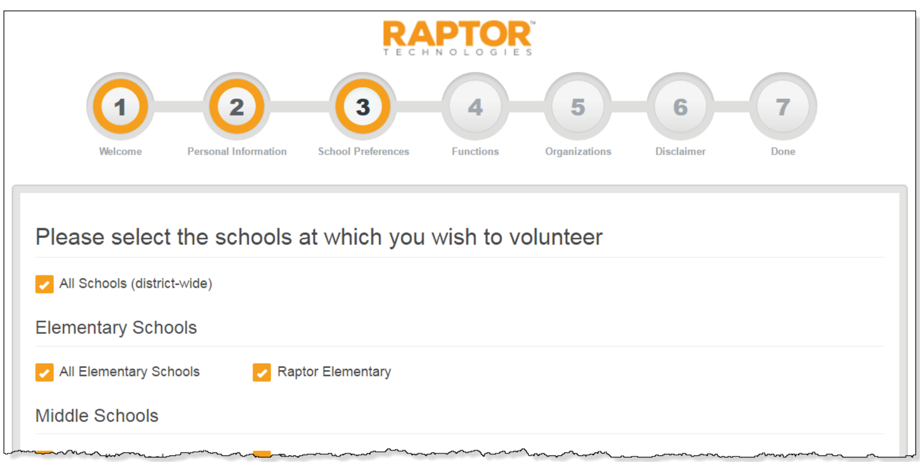
- First Name*
- Middle Name
- Last Name*

- Maiden Name
- Gender*
- Date of Birth*
- Address*
- City*
- State*
- Zip Code*
- Phone Number*
- Affiliation*
- Email*
- Driver License Number* – This field only displays if it is enabled on the online application and will only be required is the Require Driver License setting is enabled.

4. Click **Next** to continue.

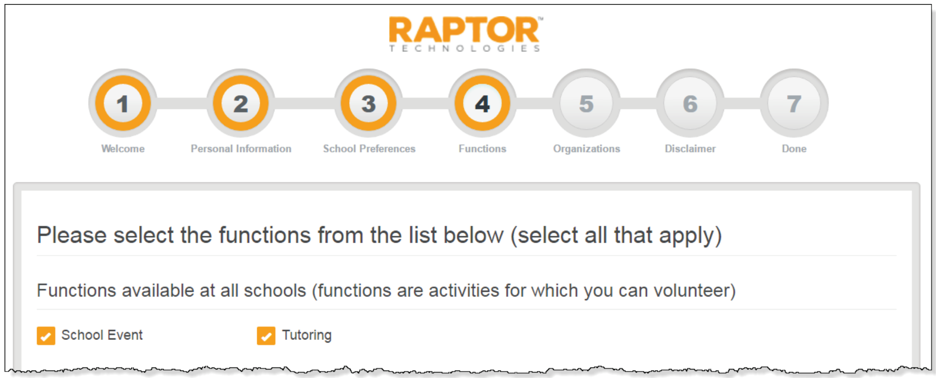
> **Note** If you need to return to a previous screen during the application process, click **Previous**.

5. On the **School Preferences** screen, select the check boxes for the schools at which you would like to volunteer and then click **Next**.



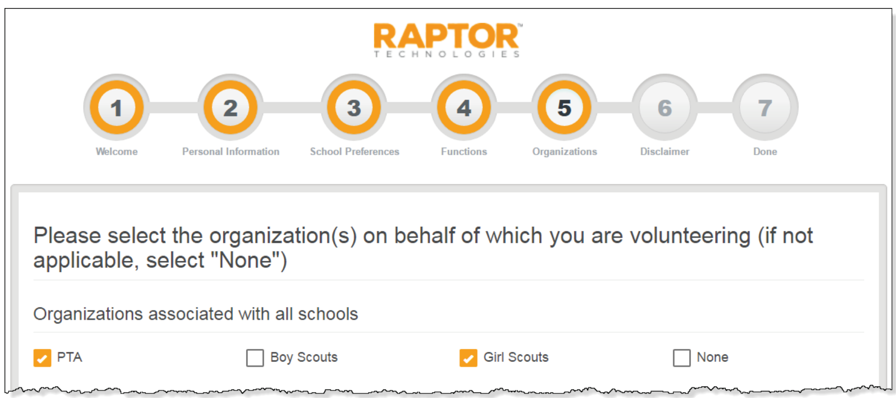
6. On the **Functions** screen, select the check boxes for the functions (activities) for which you would like to volunteer and then click **Next**.

> **Note** The Buildings selected on the **School Preferences** screen determine the Functions that are listed.

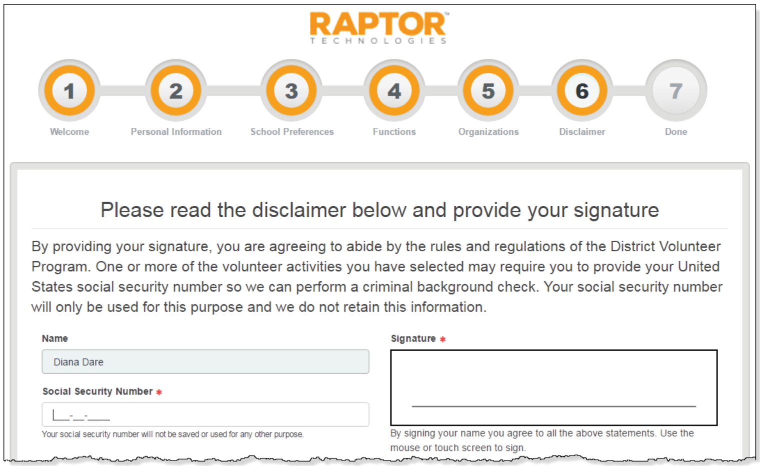


7. On the **Organizations** screen, select the check box for the organization to which you are associated and then click **Next**.

> **Note** The Buildings selected on the **School Preferences** screen determine the Organizations that are listed.

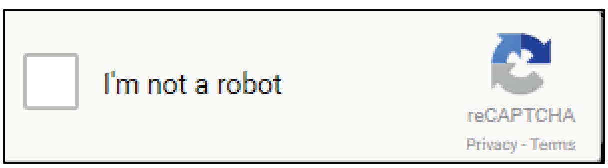


8. Read the **Application Disclaimer** and click in the **Signature** box and use the mouse or touch screen to sign your name.

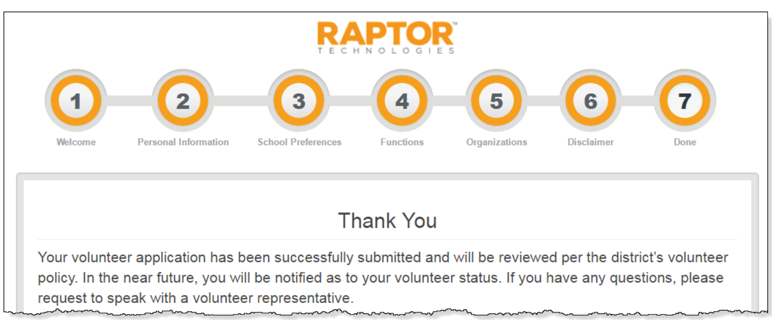


Note If the *Criminal Background Check* feature is enabled and the applicant selected a function that requires a background check, the applicant's Social Security Number will be required on the Disclaimer page. If the feature is not enabled, the **Social Security Number** field will not display on this page.

9. Select the check box on the CAPTCHA dialog to continue.



10. On the **Done** screen, click **Finish**.



The applicant will receive an email notifying them that their application has been received and is being processed. Upon approval, they will be sent an email notifying them that their application has been approved.

If the district has enabled the Volunteer Portal, the volunteer will be sent an email that contains the link to access the portal.

Using Volunteer Portal

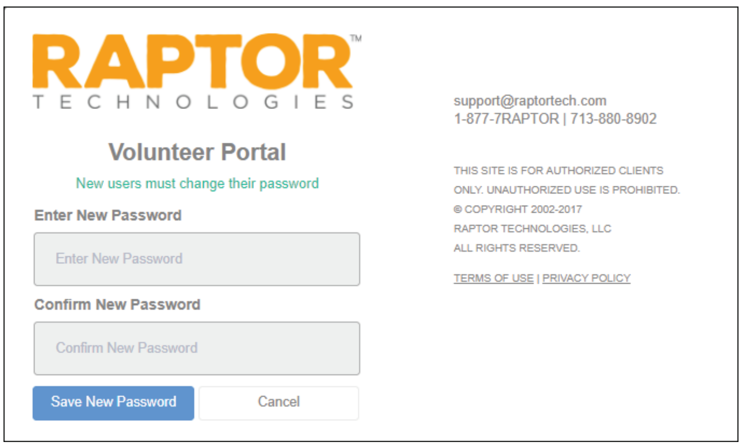
The Volunteer Portal provides an easy-to-use portal for your volunteers to sign up for events, track and log hours, view and update their profile, change their password, and communicate with other volunteers.

Upon approval as a volunteer and creation of your volunteer portal user account, you will be sent an email informing you that you have been approved. If the Volunteer Portal is enabled, the instructions to access the portal will be included in the email.

Log In to Volunteer Portal

New Users Must Change Password

1. Click the link in the email to create a new password.

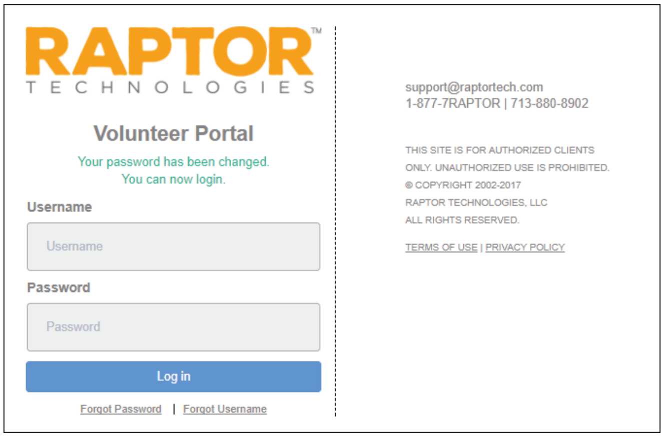


2. Enter a **New Password** and **Confirm New Password**, and then click **Save New Password**.

   The Volunteer Portal Log In screen displays.

Log In

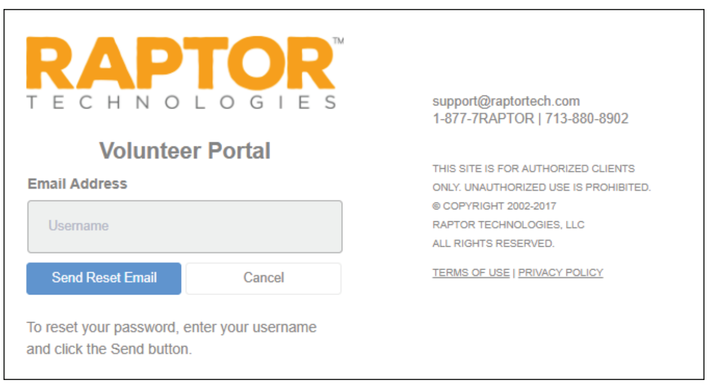
On the Volunteer Portal Log In screen, enter your **Username** (email address) and **Password**, and then click **Log In**.



Request Forgotten Password

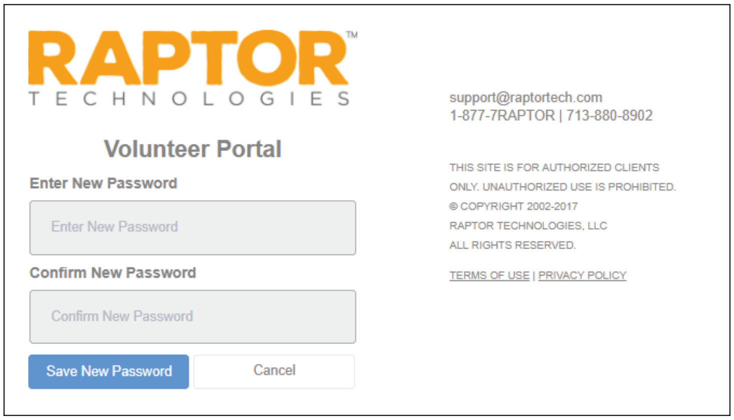
If you have forgotten your password, you can reset your password using the following procedure:

1. On the Volunteer Portal Log In screen, select the **Forgot Password** link.



2. Enter your **Username** and then click **Send Reset Email**.
3. Open the email that was sent to you and click the Please click here link to confirm your request and reset your password.

The Password Reset screen displays.



4. Enter a **New Password** and then re-enter to confirm it.
5. Click **Save New Password**.

   The Volunteer Portal Log In screen displays with a message indicating your password has been changed. You can now log in to the Volunteer Portal with your new password.

Request Forgotten Username

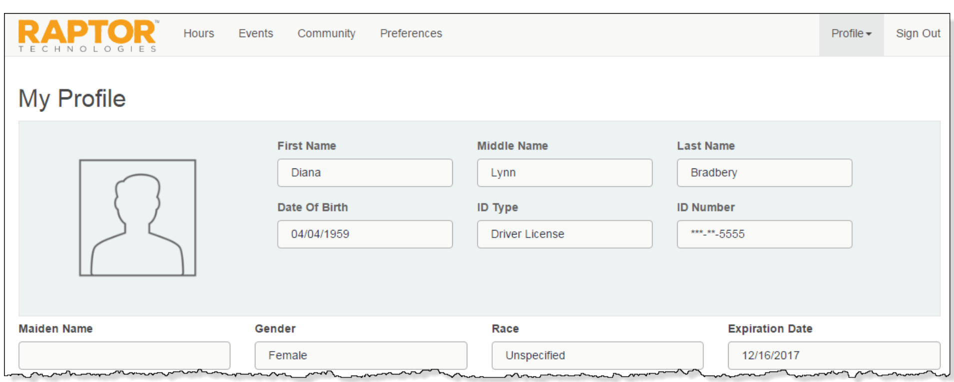
If you have forgotten your user name, select the **Forgot Username** link. A message displays informing you that your user name is your email address.

Log Out of Volunteer Portal

To log out of the Volunteer Portal, select **Sign Out** in the upper right corner of the portal.

Manage Volunteer Profile

The Volunteer Portal opens and displays the **My Profile** workspace, where the volunteer can view and edit their profile.



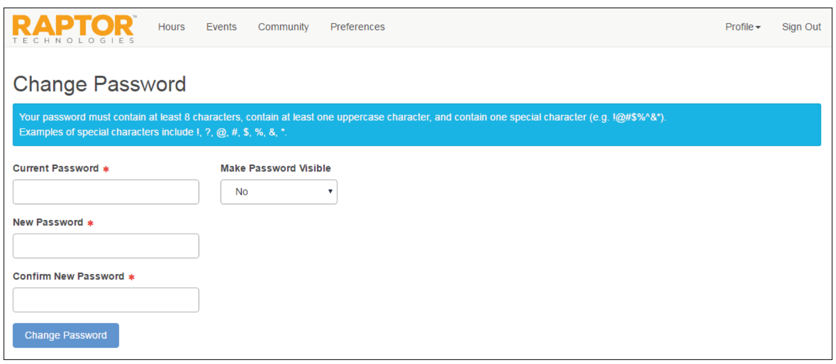
The information in the upper portion of the screen is *read only* and cannot be changed. Volunteers can update their address information, phone number and language preference.

Click **Save** after making any changes.

Change Password

Volunteers can change their password at any time from within the Volunteer Portal.

1. On the **My Profile** workspace, click the Profile tab and select **Change Password** from the drop-down menu.



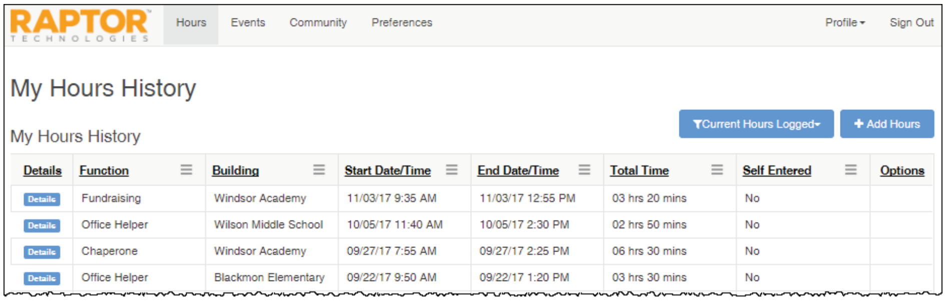
2. Enter your **Current Password** in the text box.

   If you want the password to be visible on this screen, select **Yes** from the **Make Password Visible** drop-down list.
3. Enter a **New Password** in the text box and re-enter it in the **Confirm New Password** text box.
4. Click **Change Password**.

   A message displays indicating your password was successfully changed.

Manage Hours

Use the **Hours** tab on the Volunteer Portal to view a history of the hours you have volunteered.



View All Hours

Volunteers can view all the functions and total time volunteered from the **My Hours History** workspace.

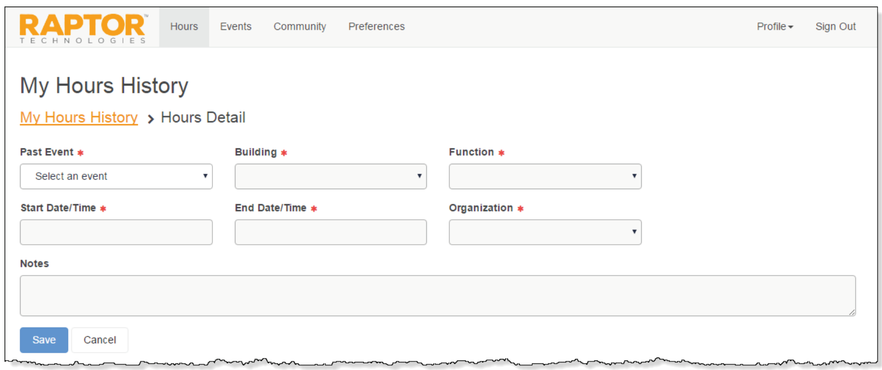
On the Volunteer Portal, click the **Hours** tab. The functions, building, start date and time, end date and time, total time and log method displays.

You can filter the hours to be displayed using the **Filter** drop-down menu. Hours can be filtered by **Current Period** (since last Reset) and **All Hours**. If hours have been reset, the date of the last reset displays following the My Hours History label.

Add Hours

When the **Allow Volunteers to Add Hours** setting is enabled, volunteers can add the hours that they volunteered in the Volunteer Portal.

1. On the Volunteer Portal, click the **Hours** tab.
2. On the **My Hours History** workspace, click **Add Hours** and then specify the following information:



- **Past Event*** – Select the event where you volunteered from the drop-down list. If the event is not listed, select **Event Not Listed Here**.
- **Function*** – Select the function you performed during the event from the drop-down list.
- **Location*** – Select the building where you volunteered for this event. If the building is not listed, select **Location Not Listed**.
- **Start Date/Time*** – Select the date and time you began volunteering.
- **End Date/Time*** – Select the date and time you stopped volunteering.
- **Organization*** – If you specified an organization in your volunteer profile, select the organization from the drop-down list. You can also select **None**.
- **Notes** – Optionally, enter notes about the event.

3. Click **Save**.

Delete Hours

When the **Allow Volunteers to Add Hours** setting is enabled, volunteers can delete the hours that they volunteered in the Volunteer Portal.

1. On the Volunteer Portal, click the **Hours** tab.
2. In the **My Hours History** grid, locate the entry you want to delete, and click **Remove**.
3. On the confirmation dialog, click **Yes** to remove the hours entry.

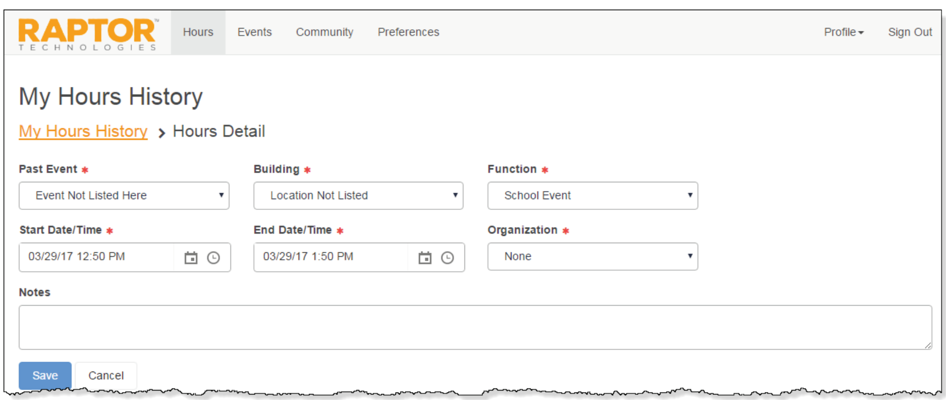
View Hour Details

Volunteers can view the details of the hours logged from the **Hours Detail** workspace. Click **Details** next to the function.

Modify Hours

Users with the *Can Edit Volunteer Hours* permission can edit the volunteer hours that they added to the volunteer portal.

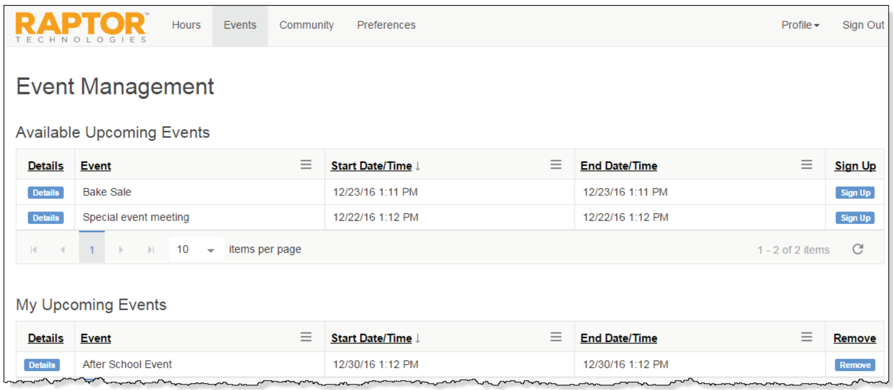
> **Note** The **Allow Volunteers to Add Hours** setting must be set to **Yes** to be able to use this feature.



1. Click **Details** next to the function.
2. Modify the **End Date/Time** and click **Save**.

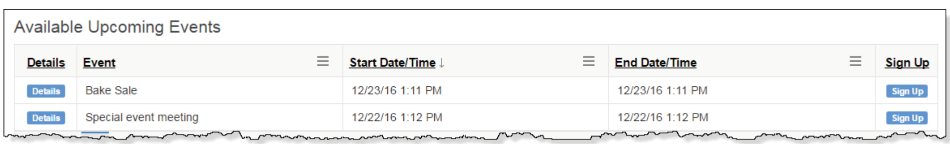
Manage Events

Use the **Events** tab on the Volunteer Portal to manage the events for which you are volunteering.



View Available Upcoming Events

Volunteers can view all of the upcoming events for which they can volunteer in the Available Upcoming Events area on the Event Management workspace.



Once the event's Start Date/Time is reached, it will no longer display in the Available Upcoming Events data grid.

Sign Up for Events

You can sign up for events from the **Available Upcoming Events** area on the **Event Management** workspace or from the **Event Details** workspace.

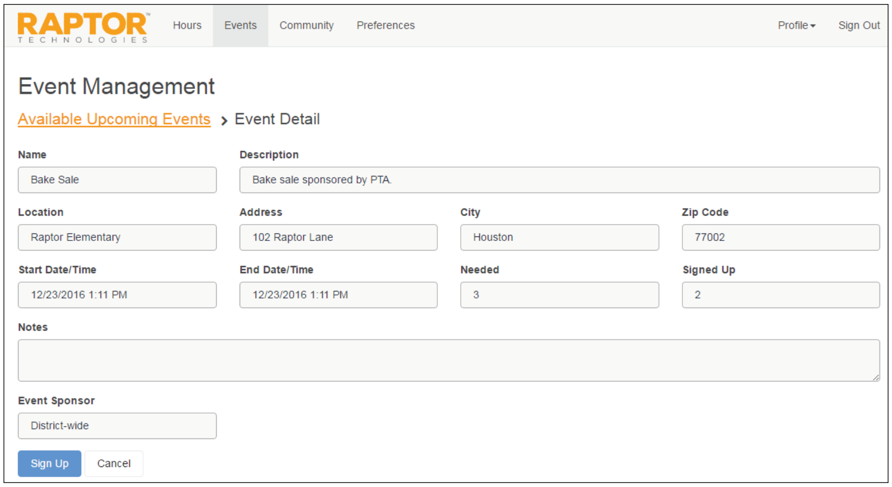
To sign up for an event from the **Available Upcoming Events** area, click **Sign Up** in the row for the event.

To sign up for an event from the **Event Details** workspace, click **Details** to open the **Event Details** and then click **Sign Up**.

Once you sign up for an event, that event is moved to the **My Upcoming Events** data grid.

View Event Details

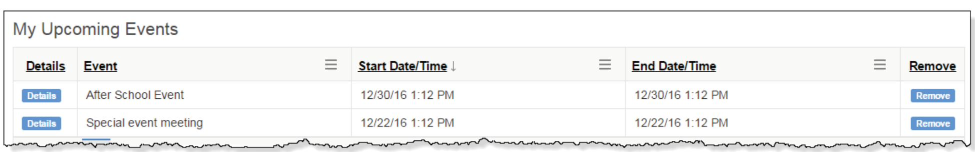
In the **Available Upcoming Events** area on the **Event Management** workspace, click **Details** for the event you want to view.



If you want to volunteer for this event, click **Sign Up**.

View Your Upcoming Events

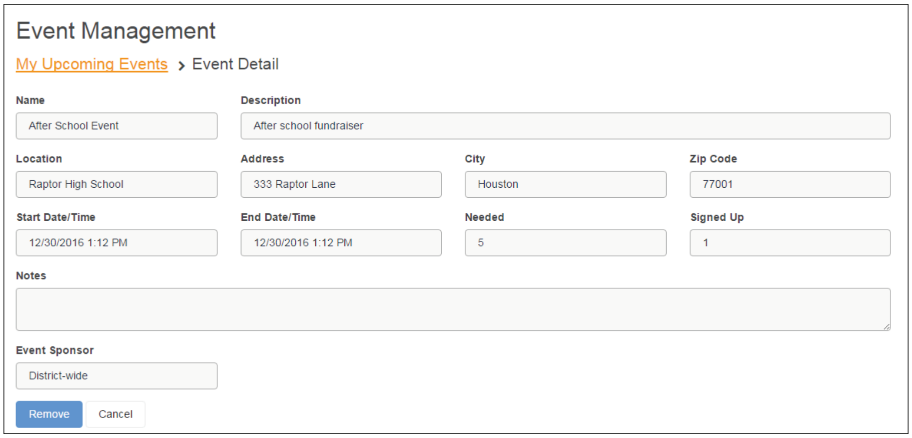
Use the **My Upcoming Events** area on the **Event Management** workspace to view the events that you have already signed up to volunteer.



If you can no longer volunteer for the event, click **Remove**.

View Upcoming Event Details

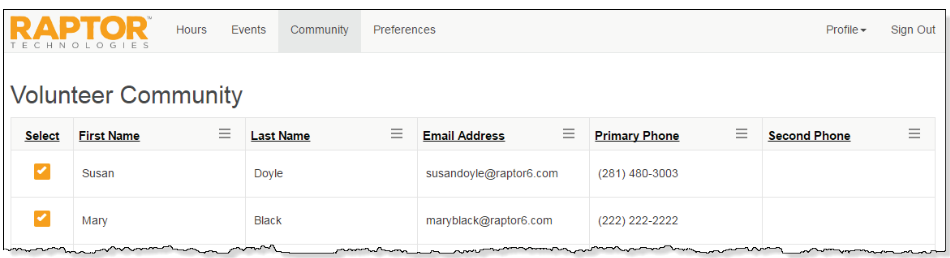
In the **My Upcoming Events** area on the **Event Management** workspace, click **Details** for the event you want to view.



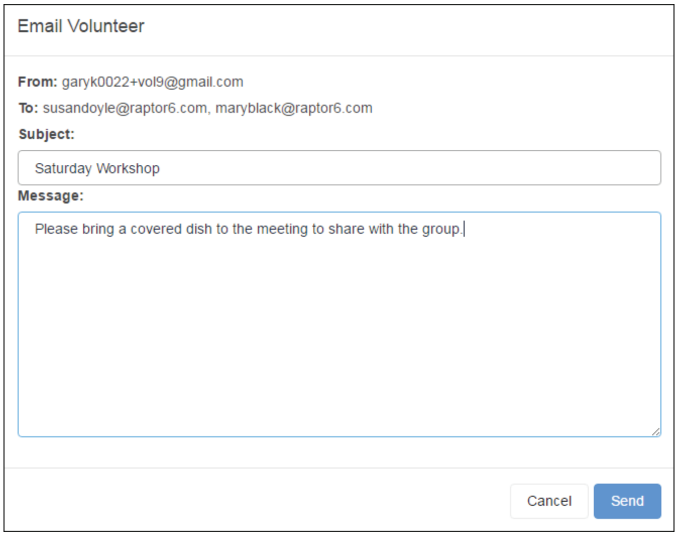
If you can no longer volunteer for the event, click **Remove**.

Email Volunteer Community

Use the **Community** tab on the Volunteer Portal to view a list of volunteers that have allowed other volunteers to view their information, and to send an email to the volunteers.



1. On the **Volunteer Community** workspace, select the check box next to the names of the volunteers to receive the email.
2. Click **Create Email**.

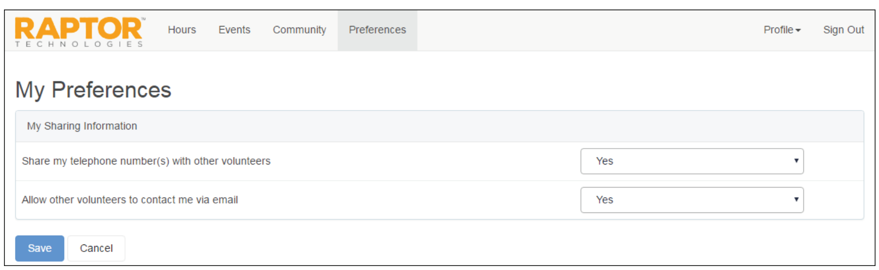


3. Enter the email **Subject** and **Message**, and then click **Send**.

   An *Email Successfully Sent* message display.

Manage Preferences

Use the **Preferences** tab on the Volunteer Portal to indicate your sharing information preferences.



On the **My Preferences** workspace, specify the following information and then click **Save**:

- **Share my telephone number(s) with other volunteers** – Select **Yes** or **No** from the drop-down list.
- **Allow other volunteers to contact me via email** – Select **Yes** or **No** from the drop-down list.

> **Note** If you select **No** to both settings, your information will not display on the Community page for other volunteers to see.

Appendix A Understanding User Accounts

Raptor System User Accounts

Raptor users have a unique set of permissions assigned to them based on the type of user account (role) that they have been assigned. The permissions assigned to the account determine what they can see and do in Raptor.

The following types of user accounts can be created in Raptor.

District Admin

The District Admin role has the highest level of permissions and is frequently assigned to district administrators. This role has full access to all schools or buildings within the district.

Building Admin

The Building Admin role is assigned to users who perform administrative functions at the school level. This type of user account is typically assigned to school secretaries, principals and assistant principals. Building Admins can be associated with more than one building.

Student Admin

The Student Admin role is assigned to users who perform student-related tasks, such as signing in and signing out students, monitoring tardy count, resetting tardy and temporary ID count, running student reports, importing students and their associated guardians, and adding, modifying and deleting students and guardians. Student Admins can be associated with more than one building.

> **Note** The Student Module must be enabled to be able to create *Student Admin* accounts.

Entry Admin

The Entry Admin role is assigned to users who are responsible for signing in and signing out visitors, students, volunteers, staff and contractors who enter and leave the building. This role is typically assigned to front-desk personnel. Entry Admins can be associated with more than one building.

District Volunteer Coordinator

The District Volunteer Coordinator role is assigned to users who manage volunteers and events, and are automatically assigned to all schools and buildings within the district. Users with this role can sign in and sign out volunteers, search volunteers and run volunteer reports. Typically, a volunteer coordinator is also responsible for adding volunteers, approving volunteers, and coordinating volunteer events.

> **Note** The Volunteer Module must be enabled to create *District Volunteer Coordinator* accounts.

Building Volunteer Coordinator

The Building Volunteer Coordinator role is assigned to users who manage volunteers and events at the school level. Users with this role can sign in and sign out volunteers, run volunteer reports, and approve volunteers for only the schools to which they are assigned.

> **Note** The Volunteer Module must be enabled to create *Building Volunteer Coordinator* accounts.

Security Officer

The Security Officer role is assigned to District or School Resource Officers and is automatically assigned to all schools or buildings within the district. Users with this role can manage alerts and run offender reports.

District Reunification Admin

The District Reunification Admin role is assigned to users who manage reunification at the client level. This user can initiate and end incidents, manage reunification settings, import rosters and run reunification reports for all buildings in their district.

Building Reunification Admin

The Building Reunification Admin role is assigned to users who manage reunification at the building level. This user can initiate and end incidents, manage reunification settings, import rosters and run reunification reports for their specific buildings.

Reunification User

The Reunification role is assigned to users who will be granted the Reunification Mobile App permissions.

Raptor Reunification Mobile App User Accounts

Raptor Reunification user accounts (roles) provide access to functionality within the Reunification mobile application.

Incident Commander

The Incident Commander role is assigned to users who are responsible for managing and overseeing a drill or live emergency. This role provides elevated access to live incident dashboards and secure documents.

Student Supervisor

The Student Supervisor role is assigned to users who are responsible for supervising and accounting for students during a drill or live emergency.

Appendix B Understanding Permissions

Each user is assigned a role that has specific permissions associated with it, and the permissions can be enabled or disabled. Typically, permissions are selected when the user account is created.

When creating a user account, the user can only grant permissions that their account includes. For example, if you are a District Admin and do not have the *Can Manage Logs* permission, you cannot create user accounts and grant the *Can Manage Logs* permission.

Refer to the following tables to understand the permissions that are available for each role.

Administration

Permission	Description	Role
Can View Logs	Provides access to the Log menu item under the Admin menu.	District Admin Building Admin District Reunification Admin Building Reunification Admin
Can Manage Client Settings	Provides access to Client Profile, Buildings, and Module Settings under the Admin menu. With this permission, a user can define drill schedules, update drill requirements and access the drill compliance dashboard.	District Admin
Can Manage Building Settings	Provides access to the Building Profile and Module Settings and under the Admin menu. With this permission, a user can update drill requirements and access a building's drill schedule.	Building Admin
Can Manage Users	Provides access to the Users/Contacts menu item under the Admin menu. With this permission, a user can view, create, modify, active and deactivate Raptor user accounts, and reset the password for the account. The role of the user creating the user accounts restricts the type of user account role they can create: ■ District Admin – can create any user account ■ Building Admin – can create only Building Admin, Student Admin and Entry Admin user accounts	District Admin Building Admin District Volunteer Coordinator Building Volunteer Coordinator District Reunification Admin Building Reunification Admin

Permission	Description	Role
	■ District Volunteer Coordinator – can create other District Volunteer Coordinators, Building Volunteer Coordinators and Volunteers. In addition, the user creating the user accounts can only assign the buildings their own account is associated with to the new user accounts.	
Can Manage Alerts	Provides access to the Alert Settings menu item under the Admin menu. With this permission, a user can view and modify notification templates associated with sex offender alerts, custom alerts, the Emergency button, and instant alerts. They can also view, create, and modify custom and instant alerts, and import custom alerts.	District Admin Building Admin Security Officer District Reunification Admin Building Reunification Admin
Can Manage Kiosks	Provides access to the Kiosk Settings menu item under the Admin menu. With this permission, a user can view, create, modify per module kiosk settings, modify client kiosk policy, and launch Kiosk Profiles.	District Admin Building Admin
Can Launch Kiosks	Provides the ability to launch a kiosk.	District Admin Building Admin Entry Admin
Can Perform Maintenance	Provides access to the Maintenance menu item under the Admin menu. With this permission, a user can merge duplicate records and perform other maintenance tasks.	District Admin Building Admin District Reunification Admin Building Reunification Admin
Can Manage Documents	Provides access to the Documents area on the General Settings workspace under Admin. With this permission, a user can add, modify or delete documents used for reunification. *This feature is not yet available in the product.*	District Admin Building Admin District Reunification Admin
Can Run System Reports	Provides access to the Raptor Link Dashboard and future system reports.	District Admin Building Admin District Reunification Admin Building Reunification Admin

Permission	Description	Role
Can Manage Report Subscriptions	Provides access to the Subscriptions tab on the Reports page. With this permission, you can add, modify and delete report subscriptions.	District Admin Building Admin Student Admin Entry Admin District Volunteer Coordinator Building Volunteer Coordinator Security Officer

Visitors

Permission	Description	Role
Can Sign In Visitors	User can sign in visitors and access the Delayed Entry and Batch Printing features.	District Admin Building Admin Entry Admin
Can Sign Out Visitors	User can sign out visitors (single or multiple sign out), view who is signed in, reprint visitor badge, change the visitor's Destination/Reason for Visit, and the Notes field.	District Admin Building Admin Entry Admin
Can Run Visitor Reports	User can view, create, manipulate and export reports related to visitors; can access the Visitor Dashboard.	District Admin Building Admin Entry Admin
Can Manage Visitors	Provides access to the All Visitors tab in the Visitors workspace. Users can view and modify visitors with "official records" and view a visitor's sign in/sign out history.	District Admin Building Admin
Can Manage Visitor Settings	Provides access to the Visitor Module settings (Admin > Module Settings > Visitors tab). User can change Visitor Module settings, manage destination/reasons, and custom fields.	District Admin Building Admin

Contractors

Permission	Description	Role
Can Sign In Contractors	User can sign in contractors and access the Delayed Entry feature.	District Admin Building Admin Entry Admin
Can Sign Out Contractors	User can sign out contractors (single or multiple sign out), view who is signed in, reprint contractor's badge, change the contractor's Destination/Reason for Visit, and the Notes field.	District Admin Building Admin Entry Admin

Permission	Description	Role
Can Run Contractor Reports	User can view, create, manipulate and export reports related to contractors; can access the Contractor Dashboard.	District Admin Building Admin Entry Admin
Can Manage Contractors	Provides access to the All Contractors tab in the Contractors workspace. Users can view and modify contractors with official records, view a contractor's sign in/sign out history, and add contractors.	District Admin Building Admin
Can Manage Contractor Settings	Provides access to the Contractor Module settings (Admin > Module Settings > Contractors tab). User can change Contractor Module settings, manage destination/reasons, companies, and custom fields.	District Admin Building Admin
Can Import Contractors	User can import contractors into the Raptor system. This permission requires *Can Manage Contractors* permission to access the All Contractors tab.	District Admin Building Admin

Students

Permission	Description	Role
Can Sign In Students	User can sign in students and access the Delayed Entry feature.	District Admin Building Admin Student Admin Entry Admin
Can Sign Out Students	User can sort and filter the list of students, and sign out students.	District Admin Building Admin Student Admin Entry Admin
Can Run Student Reports	User can view, create, manipulate and export reports related to students; can access the Student Dashboard.	District Admin Building Admin Student Admin Entry Admin
Can Manage Students	User can view all students, sort and filter the list of students, review a student's sign in/sign out history, add students and their associated guardians, and reset tardy and temporary ID counts.	District Admin Building Admin Student Admin District Reunification Admin Building Reunification Admin

Permission	Description	Role
Can Manage Student Settings	Provides access to the Student Module settings (Admin > Module Settings > Students tab). User can change Student Module settings, manage destination/reasons, and custom fields.	District Admin Building Admin Student Admin District Reunification Admin Building Reunification Admin
Can Import Students	User can import students, student photos, and guardians associated with students. **Note:** This permission requires that the user also have the *Can Manage Students* permission.	District Admin Building Admin Student Admin District Reunification Admin Building Reunification Admin
Can Manage Student Tardy Workflow	User can configure the tardy settings for the client or building. *This feature is not yet available in the product.*	District Admin Building Admin Student Admin

Staff

Permission	Description	Role
Sign In Staff	User can sign in staff and access the Delayed Entry feature.	District Admin Building Admin Entry Admin
Can Sign Out Staff	User can view staff and sign out staff (single or multiple sign out).	District Admin Building Admin Entry Admin
Can Run Staff Reports	User can view, create, manipulate and export reports related to staff members; can access the Staff Dashboard.	District Admin Building Admin Entry Admin
Can Manage Staff	User can search staff, import staff information, manually add staff, and purge staff details.	District Admin Building Admin District Reunification Admin Building Reunification Admin
Can Manage Staff Settings	Provides access to the Staff Module settings (Admin > Module Settings > Staff tab). User can change Staff Module settings, manage destination/reasons, and custom fields.	District Admin Building Admin District Reunification Admin Building Reunification Admin

Permission	Description	Role
Can Import Staff	User can import staff members into the Raptor system. **Note:** This permission requires that the user also have the *Can Manage Staff* permission.	District Admin Building Admin District Reunification Admin Building Reunification Admin

Volunteers

Permission	Description	Role
Can Sign In Volunteers	User can sign in volunteers and access the Delayed Entry and Batch Printing features.	District Admin Building Admin Entry Admin District Volunteer Coordinator Building Volunteer Coordinator
Can Sign Out Volunteers	User can view volunteers and sign out volunteers (single or multiple sign out).	District Admin Building Admin Entry Admin District Volunteer Coordinator Building Volunteer Coordinator
Can Run Volunteer Reports	User can view, create, manipulate and export reports related to volunteers; can access the Volunteer Dashboard.	District Admin Building Admin Entry Admin District Volunteer Coordinator Building Volunteer Coordinator
Can Manage Volunteers	User can search volunteers, add volunteers, and delete volunteer details.	District Admin Building Admin District Volunteer Coordinator Building Volunteer Coordinator
Can Manage Volunteer Settings	User can change Volunteer Management settings and manage functions, requirements, organizations, affiliations, and custom fields; change Sign-In/Out settings; change Volunteer Application settings and manage notifications, and online application page content; change Volunteer Portal settings and manage notifications; and change Event Management settings.	District Admin Building Admin District Volunteer Coordinator Building Volunteer Coordinator
Can Import Volunteers	User can import approved volunteers and volunteer applications. **Note:** This permission requires that the user also have the *Can Manage Volunteers* permission.	District Admin Building Admin District Volunteer Coordinator Building Volunteer Coordinator

Permission	Description	Role
Can Manage Events	User can view, create, update, and delete events, sign up volunteers or remove volunteers from events, and email volunteers.	District Admin Building Admin District Volunteer Coordinator Building Volunteer Coordinator
Can Approve Volunteers	User can view and approve volunteer applicants.	District Admin Building Admin District Volunteer Coordinator Building Volunteer Coordinator
Can View Events	User (volunteer) can view upcoming events and the events for which they have signed up.	Volunteer
Can Sign Up Events	User (volunteer) can sign up for events.	Volunteer
Can Edit Volunteer Hours	User (volunteer) can edit the hours they entered in the Volunteer Portal.	Volunteer
Can Access Volunteer Portal	User (volunteer) can log in to the Volunteer Portal.	Volunteer

Other

Permission	Description	Role
Can Run Offender Reports	User can view, create, manipulate and export reports related to offender and custom alert matches and mismatches.	District Admin Building Admin Security Officer

Reunification

Permission	Description	Role
Can Import Rosters	User can import staff rosters. **Note:** This permission requires that the user also have the *Can Manage Staff* permission.	District Admin Building Admin Student Admin District Reunification Admin Building Reunification Admin

Permission	Description	Role
Can Perform Reunification Tasks	User can reunify student with guardians and releasing students from the incident from within the Reunification Mobile Application.	District Admin Building Admin Student Admin Entry Admin District Volunteer Coordinator Building Volunteer Coordinator Security Officer District Reunification Admin Building Reunification Admin
Can Run Reunification Reports	User can view, create, manipulate, and export reports related to reunification incidents.	District Admin Building Admin Security Officer District Reunification Admin Building Reunification Admin

Reunification Mobile App

Permission	Description	Role
Can Initiate and End Incident	User can initiate and end incidents from within the Reunification Mobile Application.	District Admin Building Admin Student Admin Entry Admin District Volunteer Coordinator Building Volunteer Coordinator Security Officer District Reunification Admin Building Reunification Admin
Can Manage Reunification Settings	Provides access to the Reunification Module settings (Admin > Module Settings > Reunification tab). User can change Reunification Module settings, view emergency types, and manage emergency sub-types, locations, and statuses. It also provides access to the Drill Schedules and Drill Compliance Dashboard. **Note:** Requires *Can Manage District Settings* to access the Reunification module settings.	District Admin Building Admin District Reunification Admin Building Reunification Admin

Appendix C Using Manifest Import

The Import Manifest feature enables you to schedule the import of contractors, student data, guardians, staff data, approved volunteers, volunteer applications, and custom alerts on a daily, weekly or monthly basis (whatever fits your needs) using the Windows Task Scheduler.

Download Import Scheduler Files

You will need to download the **Raptor.Import.Scheduler.exe** (executable) the **Raptor.Import.Scheduler.exe.conf** files from the Raptor Support page. These files are downloadable as a zipped file that you can save anywhere on your computer and then unzip the files.

1. From the **Navigation** menu, select **Support**.
2. Click **Getting Started** and scroll to the bottom of the page.
3. Click Get Raptor CLI Import Tool.
4. Click Save File.

Create Manifest File

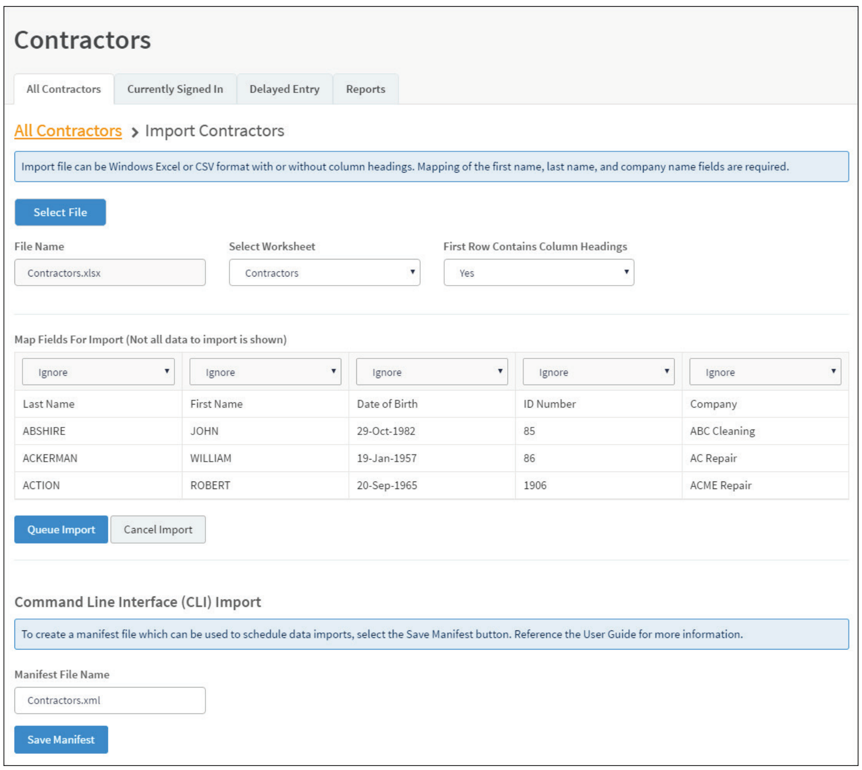
Before you can schedule an automatic import, you must first create the manifest file that contains all the mapping information. You can create a manifest file from the **All Contractors**, **All Students**, **All Staff** and **All Volunteers** and **Alert Settings** workspaces, depending on the type of import you want to perform.

For instructions specific to the type of import you are performing, the relevant section in this guide:

- Import Contractors
- Import Students
- Import Student Photos
- Import Guardians
- Import Student Residences REU
- Import Staff
- Import Staff Photos
- Import Rosters REU
- Import Staff Emergency Contacts REU
- Import Approved Volunteers
- Import Volunteer Applications
- Import Custom Alerts

Perform the following steps to create the manifest file:

1. On the [All Contractors] workspace, click [Import Contractor].
2. Click **Select File** and navigate to the location where the file is saved on your computer.
3. Select the **Excel** or **CSV** file and click **Open**.
4. If you used Excel and the file contains multiple worksheets, select the worksheet that contains the contractor information from the **Select Worksheet** drop-down list.
5. If the first row of the worksheet contains column headings, select **Yes** or **No** from the **First Row Contains Column Headings** drop-down list.



6. Map each of the columns to be imported by selecting the appropriate field in the drop-down menu above each column that displays. See the specific sections for the required columns to be mapped. The columns with **Ignore** selected with not be imported.
7. Click **Save Manifest** and save the file. You can then schedule the imports using the Windows Task Scheduler.

Importing Manifest from Command Prompt

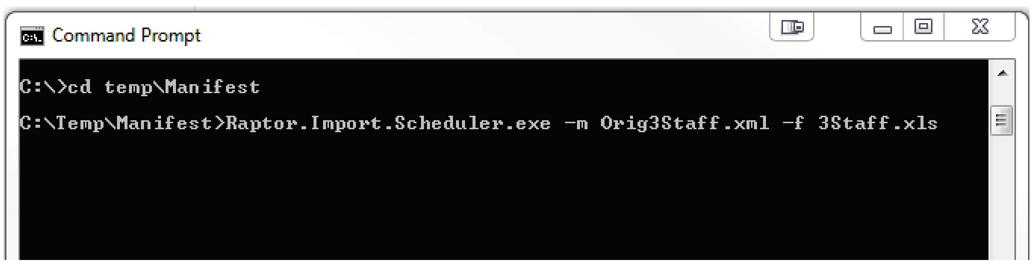
You can now import the manifest from a Microsoft Windows Command Prompt or configure it to run using the Windows Task Scheduler.

1. Open a Windows Command Prompt and change to the directory where the manifest file is saved.
2. Enter the command using the following syntax:

   <manifest import executable> -m <name of manifest file> -f <name of import file>

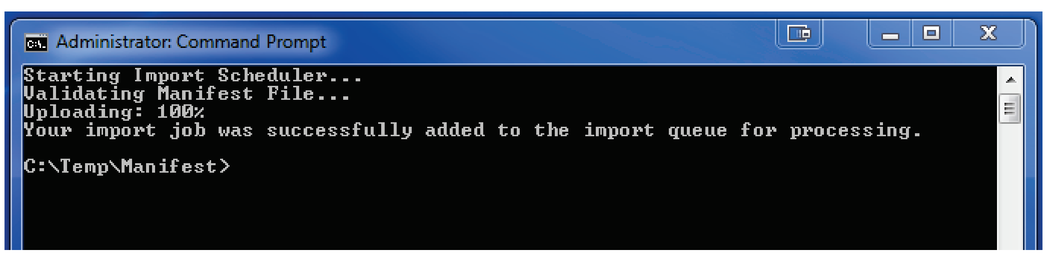
   For example:

   Raptor.Import.Scheduler.exe –m staff_import.xml –f staff_import.xls



3. Press **Enter**.

   The **.exe** file reads and validates the manifest file and then reads and uploads the **.xls** file. If the import is successful, the same message that displays in Raptor displays in the command prompt, *“Your import job was successfully added to the import queue for processing.”*



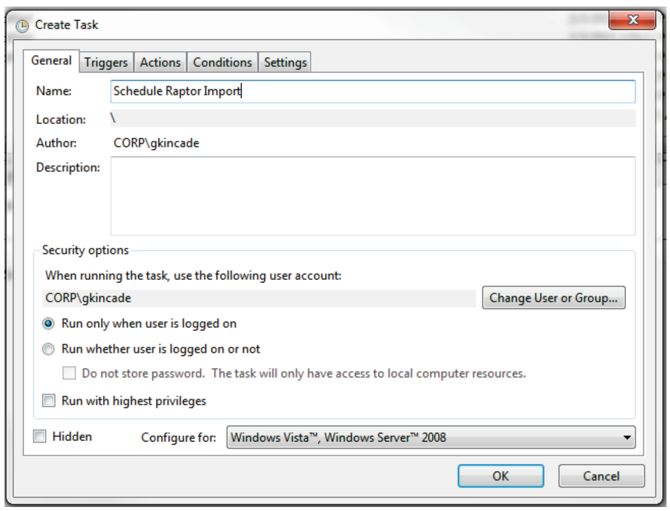
The import is queued and when it is completed, an email will be sent to the user informing them the import completed successfully or if there were errors.

Using Microsoft Task Scheduler for Import

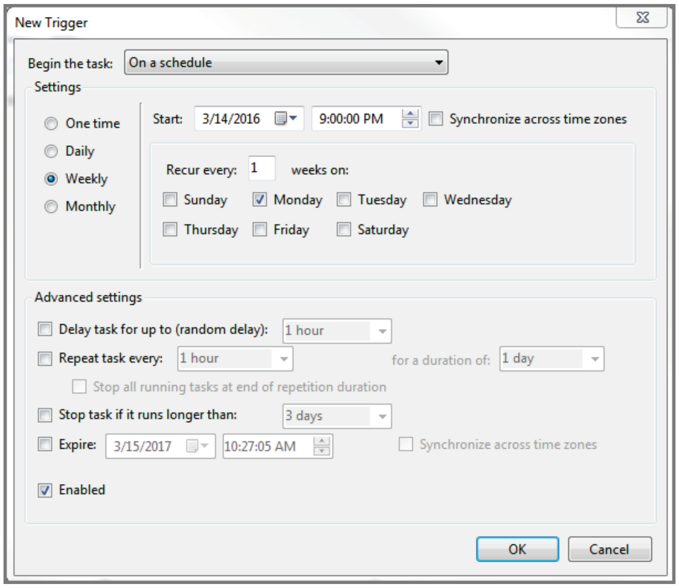
To schedule an automatic import on a regular basis using the manifest file, you can use Microsoft Task Scheduler or any other type of task schedule tool using the commands in the previous section.

Perform the following steps to schedule a task to import the manifest file in Microsoft Task Scheduler.

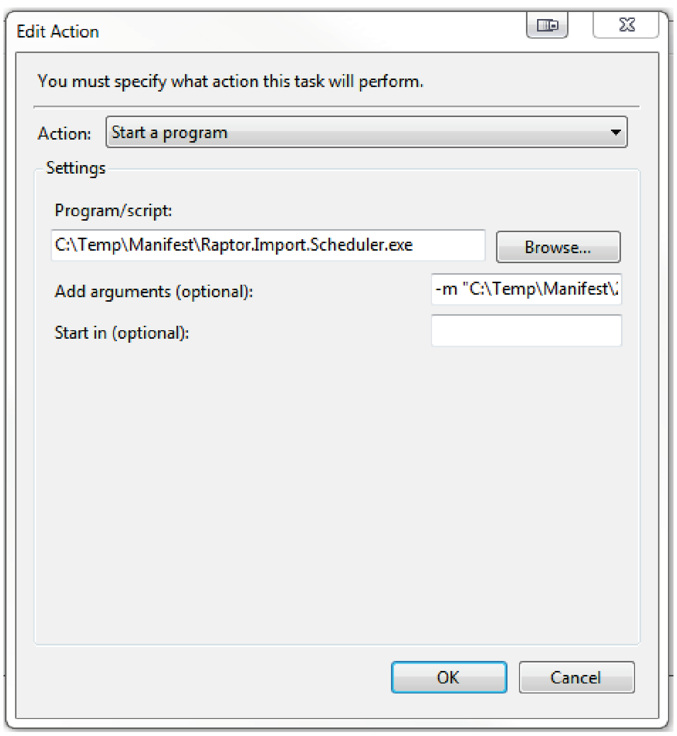
1. On the Windows desktop, click **Start** and type **Task Scheduler** in the search text box.
2. Select **Task Scheduler** to open the application.
3. In the **Actions** column, select **Create Task** and enter a **Name** for the task.



4. Click the **Triggers** tab and then click **New**.
5. On the **New Trigger** dialog, enter the schedule for when you want the import to occur (or have a reoccurring import, such as weekly at 9:00 PM every Monday) and then click **OK**.



6. Click the **Actions** tab and then click **New**.



7. Click **Browse**, navigate to the **Raptor.Import.Scheduler.exe** file, select the file and click **Open**.

8. In the **Add arguments** field, enter the following information:

   -m <location of your manifest file> -f <location of your import file>

   For example:

   -m "C:\Temp\Manifest\Staff.xml" -f "C:\Temp\Manifest\Staff.xls"
9. Click **OK**.
10. On the **Create Task** dialog, click **OK** to complete the procedure.