

Visitor Management Solution (VMS) Customer Frequently Asked Questions March 2024 Enhancements

User Management Updates

Q: What is Navigate360 releasing?

A: Navigate360 is releasing updates to the user management functionality inside VMS, improving workflows and streamlining processes. Specific updates include:

- Ability to activate & deactivate individual staff profiles
- Improved workflow when checking in a substitute
- Scheduled dates for a substitute will show on their profile
- Ability to edit substitute name & email
- Substitutes can check in & out using barcode/RFID on self-serve kiosk (only if they have a scheduled period)
- Staff Type & Job Title fields are separate fields now
- Auto check out option available for staff, substitutes, visitors, & volunteers
- Ability to check-in new staff members when inviting them to use VMS

Q: Why did Navigate360 make changes?

A: The user management updates improve the user experience and provide clarity around functionality and workflow capabilities.

Q: What is the difference between Staff Type and Job Title?

A: Staff type options are "Staff" or "Substitute." If a person is set as "Staff," the user has the option to add their specific job title or select from the existing list of pre-set job titles. This helps streamline and clarify who is in your building and what their role is.

Q: Are substitutes able to check in and out using the barcode/RFID functionality?

A: Yes, as long as their substitution period has already been set in VMS.

Q: How do I deactivate staff members?

A: Any staff member can be activated/deactivated from their staff profile or the staff list. Users can bulk activate/deactivate staff members with ease from the staff list page.

Q: Is it possible to set an auto-checkout time for staff, substitutes, visitors, and volunteers?

A: Yes. Auto-check out ensures accuracy for payroll reporting, leads to cleaner reporting metrics, and saves time in adjusting incorrect time in building records. District

and building admins will pre-select the auto-check out time in the "Time in Building" tab (previously the FKA Time in Building tab).

Q: Will reports show who was auto-checked out?

A: Yes. For ease of identification in reports, any person who was auto-checked out will have an asterisk next to the time in which they were auto-checked out.

Q: What are the newest events that are captured in the Activity log?

A: The following events will now show on the Activity log:

- Staff activation/deactivation
- Substitute profile edits

Reporting Updates

Q: What is Navigate360 releasing?

A: Navigate360 is releasing expanded reporting functionality for VMS. Specific updates include:

- Student Metric shows Late Check-Ins by Reason split by Excused/Unexcused
- Ability to filter by name for visitors, staff, substitutes, & students
- Ability to set custom date ranges for reports
- Ability to filter by grade level for students
- Ability to filter on multiple buildings
- Ability to see total time for staff and substitutes on staff and substitute reports

Q: Why did Navigate360 make these changes?

A: By enhancing VMS reporting functionality, customers will have additional ways to understand their data, helping to identify trends and improve their visitor management processes.

Q: What new updates are available for Student Reports?

A: Student Reports include the following updates:

- Ability to filter on specific buildings that they have access to
- Ability to filter on custom date ranges, in addition to preset options
- Ability to filter report data for a specific student
- Ability to filter report data for a specific grade level
- Ability to export a report for all filtered data
- Student Check-in metric shows the data for both excused and unexcused late check-ins

Q: What new updates are available for Staff Reports?



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A: Staff Reports include the following updates:

- Ability to filter on specific buildings that they have access to
- Ability to filter on custom date ranges, in addition to preset options
- Ability to filter report data for a specific staff member
- Ability to export a report for all filtered data
- Exported Staff Reports show the total checked-in time grouped by staff member

Q: What new updates are available for Substitute Reports?

A: Substitute Reports include the following updates:

- Ability to filter on specific buildings that they have access to
 - Ability to filter on custom date ranges, in addition to preset options
 - Ability to filter report data for a specific substitute
 - Exported Substitute Reports show the total checked-in time grouped by substitute
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Q: What new updates are available for Visitor Reports?

A: Visitor Reports include the following updates:

- Ability to filter on specific buildings that they have access to
- Ability to filter on custom date ranges, in addition to preset options
- Ability to filter report data for a specific visitor
- Ability to export a report for all filtered data

Q: What new updates are available for Volunteer Reports?

A: Volunteer Reports include the following updates:

- Ability to filter report data for a specific volunteer
 - Ability to filter on custom date ranges, in addition to preset options.
 - Ability to export a report for all filtered data
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