



Raptor University

Raptor System: Contractor Module

Instructor:

Agenda

The Contractors Module is used to manage the contractors who enter your building. The following topics are outlined in this document:

- All Contractors
 - Add Contractor
 - Import Contractor
 - View and Modify Contractor Details
- Sign In Procedures for Contractors
 - Sign In – Scan
 - Sign In – Find
 - Sign In – Manual
- Sign Out Contractors
- View Sign-In/Sign-Out History
- Currently Signed In Contractors
 - View Sign-In Information
 - Modify Destination/Notes
 - Print or Reprint Badge
- Delayed Sign In and Sign Out
- Reports

Contractors Workspace

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.

Administrators with the *Can Manage Contractors* permission can use the **All Contractors** tab to view, edit and delete all contractors who have been added to the Raptor system. You also use this tab to add new contractors individually or use the import feature (Administrators with the *Can Import Contractors* permission) to add multiple contractors.

The screenshot shows the Raptor Technologies web application interface. The top header includes the Raptor Technologies logo, a dropdown menu for 'Raptor High School', and an 'EMERGENCY' button. The left sidebar contains a user profile for 'Devin DistrictAdmin' with links to 'Profile' and 'Logout', and a 'Modules' section with links to 'Dashboard', 'Admin', 'Sign In/Sign Out', 'Visitors', 'Contractors' (highlighted), 'Students', and 'Staff'. The main content area is titled 'Contractors' and features four tabs: 'All Contractors', 'Currently Signed In', 'Delayed Entry', and 'Reports'. Below the tabs are two buttons: '+ Add Contractor' and 'Import Contractors'. The 'All Contractors' tab is active, displaying a table with the following data:

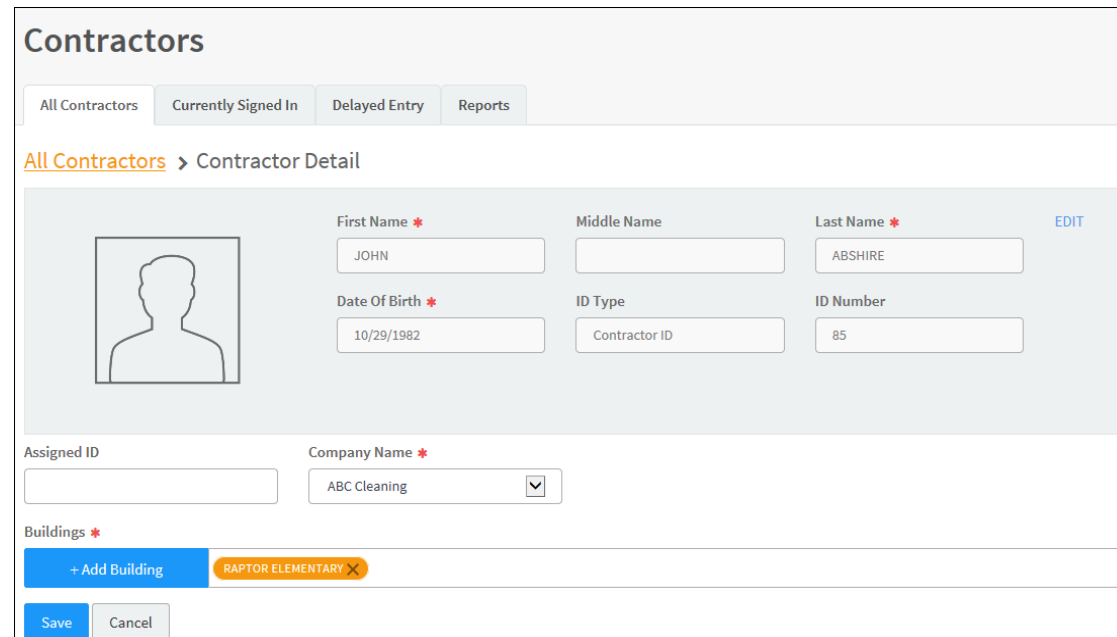
Details	First Name	Last Name ↑	Company Na...	ID Number	Date Of Birth	Last Visited	Options
▶	JOHN	ABSHIRE	ABC Cleaning	85	10/29/1982	08/26/2016	🔒
▶	WILLIAM	ACKERMAN	AC Repair	86	01/19/1957	08/26/2016	🔒
▶	ROBERT	ACTION	ACME Repair	1906	09/20/1965		🔒

At the bottom of the table, there is a pagination bar showing '1' of 3 items, a dropdown for '10 items per page', and a '1 - 3 of 3 items' summary with a refresh icon.

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** and 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.



The screenshot displays the 'Contractors' workspace with the 'All Contractors' tab selected. The breadcrumb trail shows 'All Contractors > Contractor Detail'. The form includes a profile picture placeholder, a grid of input fields for 'First Name' (JOHN), 'Middle Name', 'Last Name' (ABSHIRE), 'Date Of Birth' (10/29/1982), 'ID Type' (Contractor ID), and 'ID Number' (85). Below this is a section for 'Assigned ID' and 'Company Name' (ABC Cleaning). At the bottom, there is a 'Buildings' section with a '+ Add Building' button and a list containing 'RAPTOR ELEMENTARY'. 'Save' and 'Cancel' buttons are at the very bottom.

Contractors

All Contractors | Currently Signed In | Delayed Entry | Reports

All Contractors > Contractor Detail

First Name * | Middle Name | Last Name * | EDIT

JOHN | | ABSHIRE

Date Of Birth * | ID Type | ID Number

10/29/1982 | Contractor ID | 85

Assigned ID | Company Name *

| ABC Cleaning

Buildings *

+ Add Building | RAPTOR ELEMENTARY

Save | Cancel

Add Contractor, cont.

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 4 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 Contractor Module Settings.
 7. In the Buildings area, click **Add Building** and select the building the contractor is allowed to visit.
 8. Click **Save**.

Import Contractors

The Import Contractors utility enables you to import a list of 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.

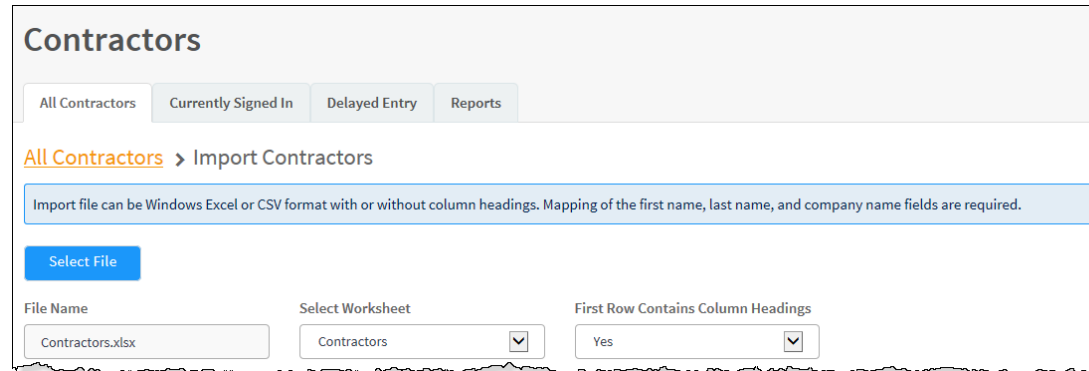
Note: To use the import feature, you must first create an Excel spreadsheet or comma delimited file that contains the required information.

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.

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.



The screenshot shows the 'Contractors' workspace in the Raptor system. At the top, there are tabs for 'All Contractors', 'Currently Signed In', 'Delayed Entry', and 'Reports'. Below the tabs, the breadcrumb 'All Contractors > Import Contractors' is visible. A blue box contains the instruction: 'Import file can be Windows Excel or CSV format with or without column headings. Mapping of the first name, last name, and company name fields are required.' Below this is a blue 'Select File' button. At the bottom, there are three input fields: 'File Name' with the text 'Contractors.xlsx', 'Select Worksheet' with a dropdown menu showing 'Contractors', and 'First Row Contains Column Headings' with a dropdown menu showing 'Yes'.

4. Select the **Excel** or **CSV** file and click **Open**.
5. If you used Excel and the file contains multiple worksheets, choose the worksheet that contains the contractor information from the **Select Worksheet** drop-down list.

Import Contractors, cont.

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. Map each of the columns to be imported by selecting the appropriate field in the drop-down menu above each column that displays. **First Name**, **Last Name**, and **Company Name** are required columns. The columns with **Ignore** selected will not be imported.

Map Fields For Import (Not all data to import is shown)

Last Name	First Name	Date Of Birth	ID Number	Company Name
ABSHIRE	JOHN	29-Oct-1982	85	ABC Cleaning
ACKERMAN	WILLIAM	19-Jan-1957	86	AC Repair
ACTION	ROBERT	20-Sep-1965	1906	ACME Repair

Queue Import **Cancel Import**

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.
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.

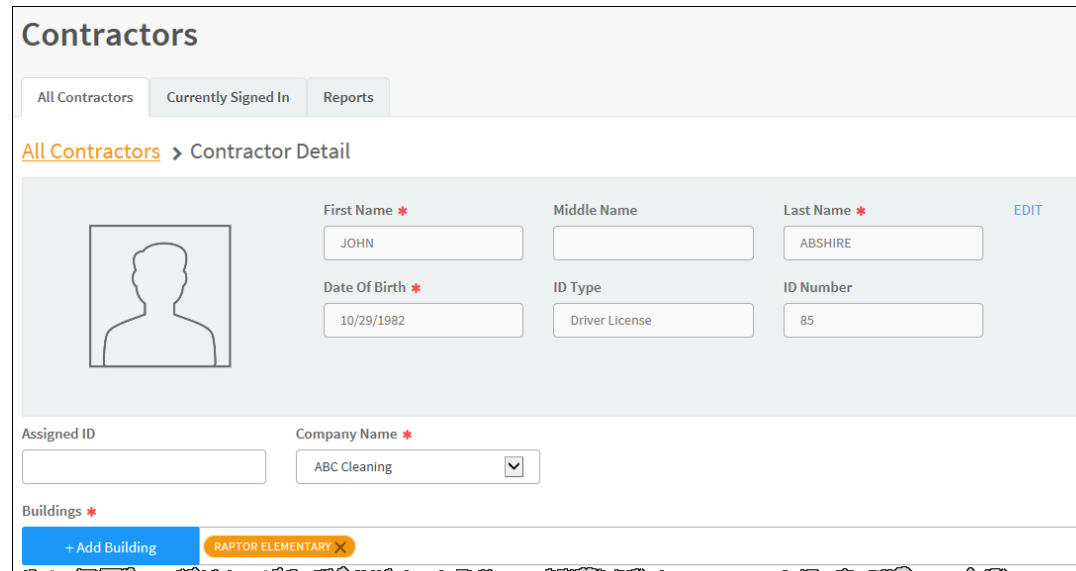
When the import has completed processing, an email will be sent to the email address of the user indicating the number of records successfully imported and any error that may have occurred.

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.



The screenshot shows the 'Contractors' workspace with tabs for 'All Contractors', 'Currently Signed In', and 'Reports'. The 'All Contractors' tab is active, and the 'Contractor Detail' workspace is expanded. The form contains the following fields:

- First Name ***: Input field with 'JOHN'.
- Middle Name**: Input field (empty).
- Last Name ***: Input field with 'ABSHIRE'.
- Date Of Birth ***: Input field with '10/29/1982'.
- ID Type**: Input field with 'Driver License'.
- ID Number**: Input field with '85'.
- Assigned ID**: Input field (empty).
- Company Name ***: Dropdown menu with 'ABC Cleaning' selected.
- Buildings ***: A list of buildings, including 'RAPTOR ELEMENTARY'.

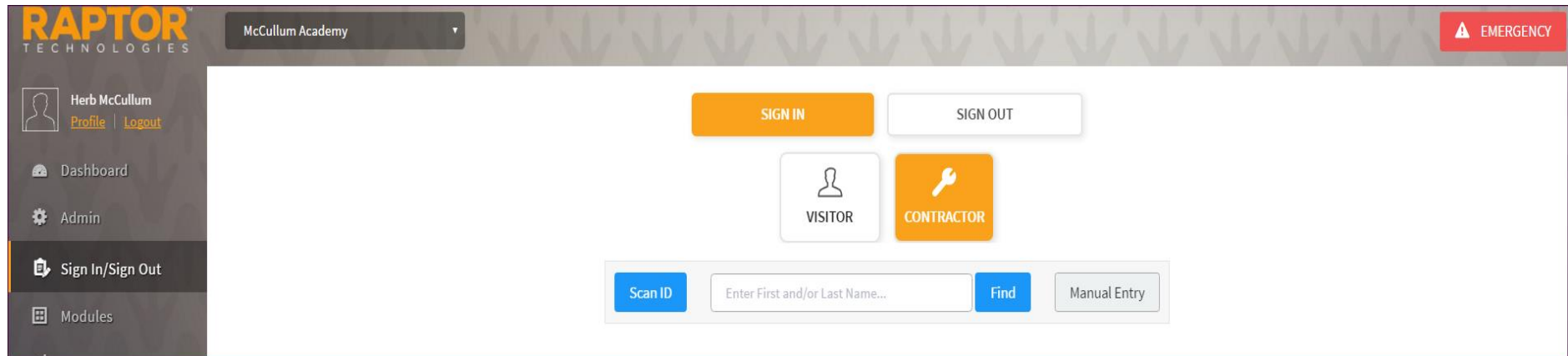
An 'EDIT' link is located next to the 'Last Name' field. A '+ Add Building' button is located at the bottom left of the buildings list.

3. Click **Edit** to modify the information in the contractor record.
Note: Buildings will only be displayed at the client level (All Buildings).
4. Click **Save** to update the record.

Sign-In Procedures

Use the **Sign In/Sign Out** workspace to sign in and sign out people entering and leaving your building.

1. Select **Sign In/Sign Out** in the navigation menu. By default, the **Sign In** button is selected.
2. Click the **Contractor** button.
3. Use one of the following methods (Scan ID, Find, or Manual Entry) to complete the sign in process.



Sign In – Scan ID

Scanning an ID is the easiest and recommended method for signing in visitors, contractors and volunteers. You must have the Raptor Scanner attached to your computer to use this feature.

1. Insert the state-issued identification card into the scanner, face up, and click **Scan**.



2. 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.
3. From the **Destination/Reason** drop-down list, select the purpose for the visit.
4. In the **Notes** field, you may add the purpose of the visit.
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.

Sign In – 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 into the system. *This method **must** be used to sign in students, staff members and volunteers.*

1. In the **Find** text box, type the **First Name** and/or **Last Name** and then click **Find**.

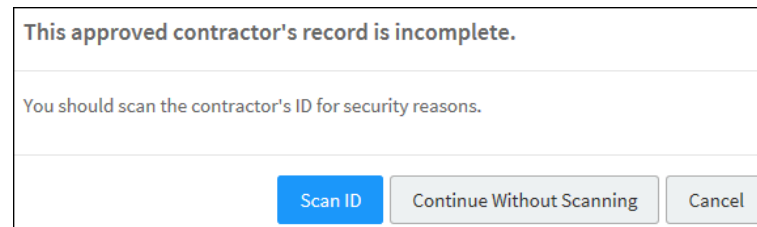
A search interface consisting of a text input field with the placeholder text "Enter First and/or Last Name..." and a blue button labeled "Find" to its right.

If the system finds the exact match during the search, the person's information displays.

2. If the system returns multiple matches, find the name in the Search Results list and then click **Sign In** next to the name of the person you are signing in.

Contractor, Guardian and Volunteer Sign-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.

A dialog box with a light gray background. It contains the text "This approved contractor's record is incomplete." in bold. Below this, it says "You should scan the contractor's ID for security reasons." At the bottom, there are three buttons: "Scan ID" (blue), "Continue Without Scanning" (light gray), and "Cancel" (light gray).

Sign In – Find

3. 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.

Note:

 - If a contractor’s scanned data is different from the information in their profile, they will be prompted to **Continue Sign In Without Changes** (the scanned data will not be saved), **Continue Sign In – Create New Contractor** (a new contractor profile will be created with the scanned data), or **Cancel** the sign in.
 - If an approved volunteer’s scanned data is different from the information in their profile, they will be prompted to **Continue Sign In Without Changes** (the scanned data will not be saved) or **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. Proceed to Step 4.
 - **Cancel** – Exit the dialog and cancel the sign in.
4. From the **Destination/Reason** drop-down list, select the purpose for the visit or enter another destination/reason in the text field (if signing in visitor, contractor or staff). If signing in a student, select the reason for late sign in.
5. 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.

Sign In – 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. Click **Manual Entry** and then complete the fields on the screen. The following fields are required:
 - First Name
 - Last Name
 - Date of Birth
2. 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.
3. From the **Destination/Reason** drop-down list, select the purpose for the visit.
4. Enter information in the **Notes** text box.
5. 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.

Sign Out Procedures

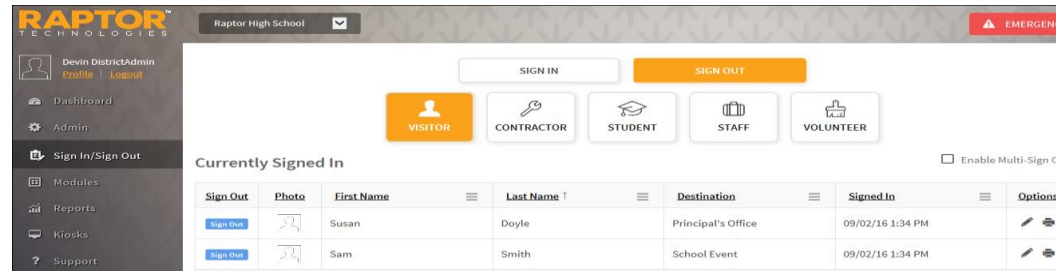
Scan 1D Barcode

If you have the 1D barcode reader installed and the *Print 1D barcode on badge* feature enabled, you can scan the 1D barcode on the badge to sign out a visitor, contractor or volunteer.

From the navigation menu, select **Sign In/Sign Out** and wave the badge under the 1D barcode scanner.

Manual Sign Out

1. From the navigation menu, select **Sign In/Sign Out** and then click **Sign Out**.



Note: 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.

2. Click the button for who you are signing out (**Visitor**, **Contractor**, **Staff** or **Volunteer**).
3. Find the name of the person in the **Currently Signed In** list and then click **Sign Out**.

Multiple Sign Out

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**.

Contractor Sign-In/Sign-Out History

The **Sign In/Sign Out** 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 choose to display the Event Method and Notes columns.

Sign-In/Out History											
<u>Date Time</u> ↓	≡	<u>Event Type</u>	≡	<u>Event Method</u>	≡	<u>Building Name</u>	≡	<u>Destination</u>	≡	<u>Notes</u>	≡
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 Plumbing	
03/17/16 3:02 PM		Sign In				Raptor Elementary		Principal's Office		Fix Plumbing	

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.

Contractors

All Contractors







Currently Signed In

Delayed Entry

Reports

Currently Signed In

☐ Enable Multi-Sign Out

Sign Out	Photo	First Name	Last Name	Company Name	Destination	Signed In	Options
<div>Sign Out</div>		JOHN	ABSHIRE	ABC Cleaning	Principal's Office	08/26/16 5:44 PM	<div></div>
<div>Sign Out</div>		WILLIAM	ACKERMAN	AC Repair	Principal's Office	08/26/16 5:45 PM	<div></div>




View Currently Sign-In Contractor Information

View the contractors who are currently signed in, the sign in date and time, the destination/reason for the visit, the company they represent, and any notes associated with the contractor.

Currently Signed In Contractors, cont.

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. 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 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:

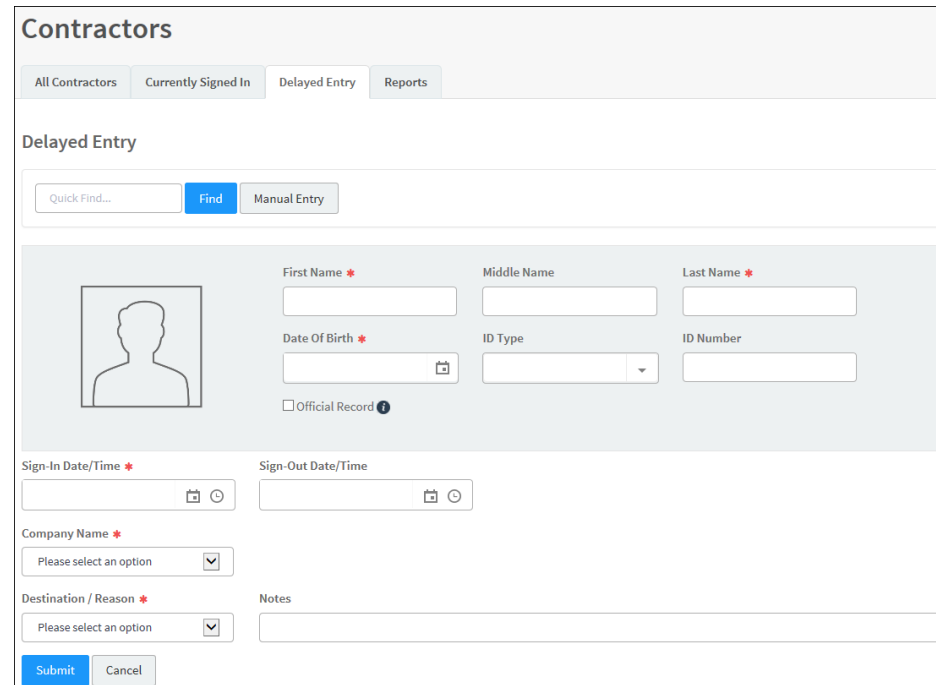
- To sign out a single contractor, click **Sign Out** next to the contractor's name.
- To sign out multiple contractors, select the **Enable Multi-Sign-Out** check box in the upper right corner, select the check box next to all the contractors to be signed out, and then click **Sign Out**.
- To return to single sign-out mode, clear the **Enable Multi-Sign-Out** check box.

Delayed Sign In and Sign Out

If you are unable to sign in or sign out contractors 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 Administrators to record the actual sign-in and sign-out times but the entry is delayed until the system is available.

Note: This feature is not visible at the All Buildings level.

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.







The screenshot shows the 'Contractors' section of a web application. At the top, there are four tabs: 'All Contractors', 'Currently Signed In', 'Delayed Entry' (which is selected), and 'Reports'. Below the tabs, the 'Delayed Entry' section is titled. It contains a search bar with a 'Quick Find...' placeholder, a blue 'Find' button, and a 'Manual Entry' button. Below this is a form for entering contractor information. It includes a profile picture placeholder, and fields for 'First Name', 'Middle Name', and 'Last Name'. There are also fields for 'Date Of Birth' (with a calendar icon), 'ID Type' (a dropdown menu), and 'ID Number'. A checkbox labeled 'Official Record' is present. Below these fields are two date/time pickers for 'Sign-In Date/Time' and 'Sign-Out Date/Time'. At the bottom, there are two dropdown menus for 'Company Name' and 'Destination / Reason', both with 'Please select an option' as the placeholder. A 'Notes' text area is also present. At the very bottom are 'Submit' and 'Cancel' buttons.

Delayed Sign In and Sign Out, cont.

4. If the person has previously been entered into Raptor, enter their **First Name** or **Last Name** in the text field and click **Find** and then select the person from the search results.
5. If the person has not previously been entered into Raptor, click **Manual Entry** and enter the following required information on the Delayed Entry workspace:

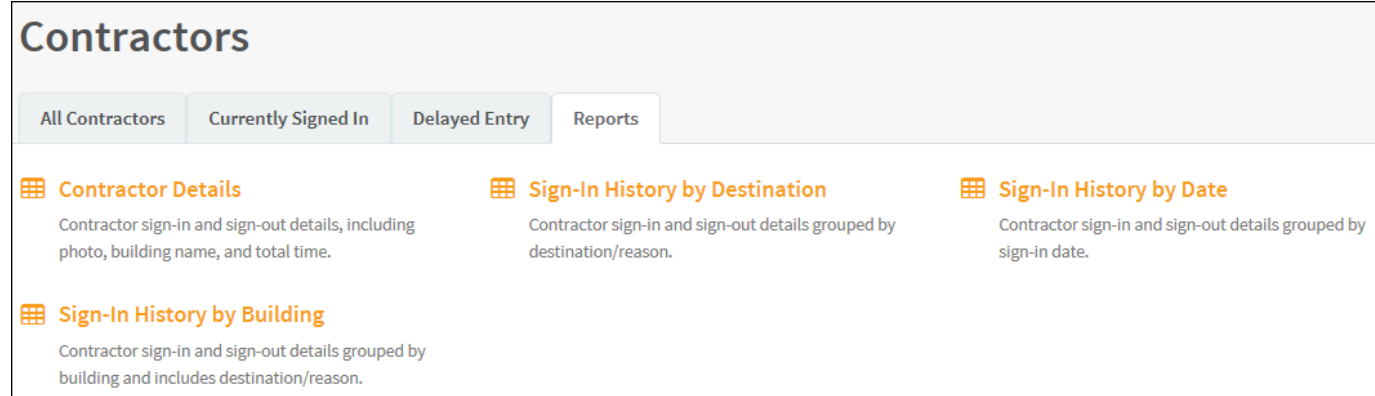
Note: If you manually enter the person's information, their information will not be found using the Find feature on future visits until their ID has been scanned into Raptor.

- First Name
 - Last Name
 - Date of Birth
 - 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 – Click the  icon to select the date and then click the  icon to select the time that the person actually 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.
6. Click **Submit**.

A Delayed Entry Successful message displays in the lower right corner of the screen.

Contractor Reports

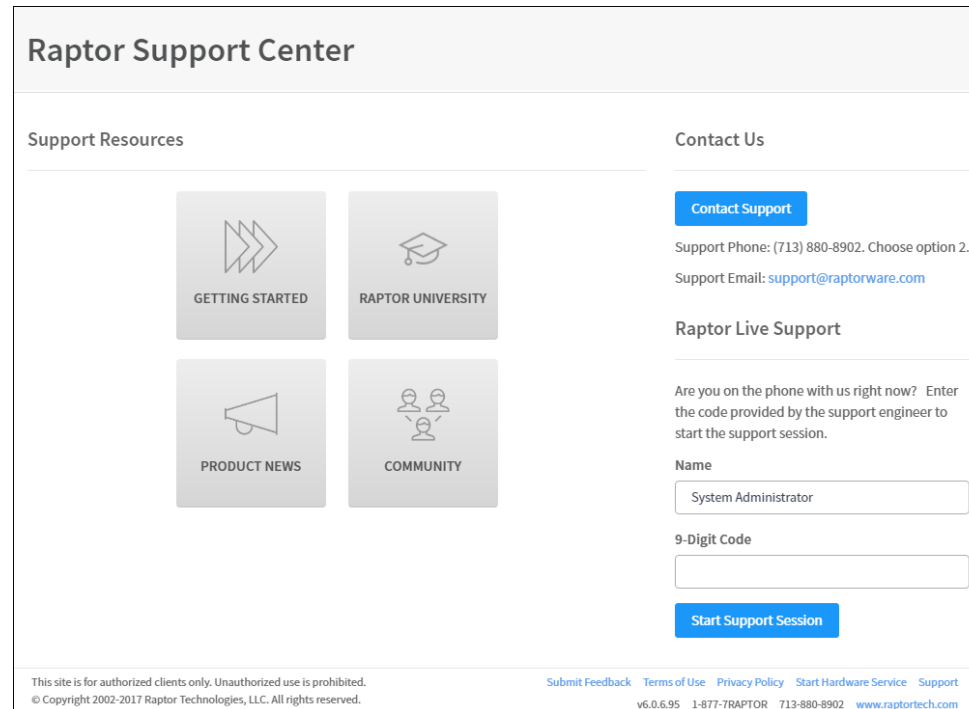
Use the **Reports** tab to run reports for contractor activity. The following Contractor reports are available:



- **Contractor Details** – Contractor sign-in and sign-out details, including company, building name, and total time, and photo.
- **Sign-In History by Destination** – Contractor sign-in and sign-out details grouped by destination/reason.
- **Sign-In History by Date** – Contractor sign-in and sign-out details grouped by sign-in date.
- **Sign-In History by Building** – Contractor sign-in and sign-out details grouped by building and includes destination/reason.

Raptor Support Center

The Support menu item in the navigation menu launches the Raptor Support Center where you can find Self Help Resources for using Raptor.



The screenshot shows the Raptor Support Center interface. It has a header 'Raptor Support Center' and two main sections: 'Support Resources' and 'Contact Us'. The 'Support Resources' section contains four tiles: 'GETTING STARTED' (with a chevron icon), 'RAPTOR UNIVERSITY' (with a graduation cap icon), 'PRODUCT NEWS' (with a megaphone icon), and 'COMMUNITY' (with a group of people icon). The 'Contact Us' section has a blue 'Contact Support' button, followed by contact information: 'Support Phone: (713) 880-8902. Choose option 2.' and 'Support Email: support@raptorware.com'. Below this is the 'Raptor Live Support' section, which includes a text prompt: 'Are you on the phone with us right now? Enter the code provided by the support engineer to start the support session.' This is followed by a 'Name' field with the text 'System Administrator', a '9-Digit Code' field, and a blue 'Start Support Session' button. At the bottom, there is a footer with a disclaimer, a list of links (Submit Feedback, Terms of Use, Privacy Policy, Start Hardware Service, Support), and version/contact information (v6.0.6.95, 1-877-RAPTOR, 713-880-8902, www.raptortech.com).

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