



PANTHERTRAIL PROCEDURE DOCUMENT

PANTHERTRAIL SYSTEM & PANTHERTRAIL REPORTS

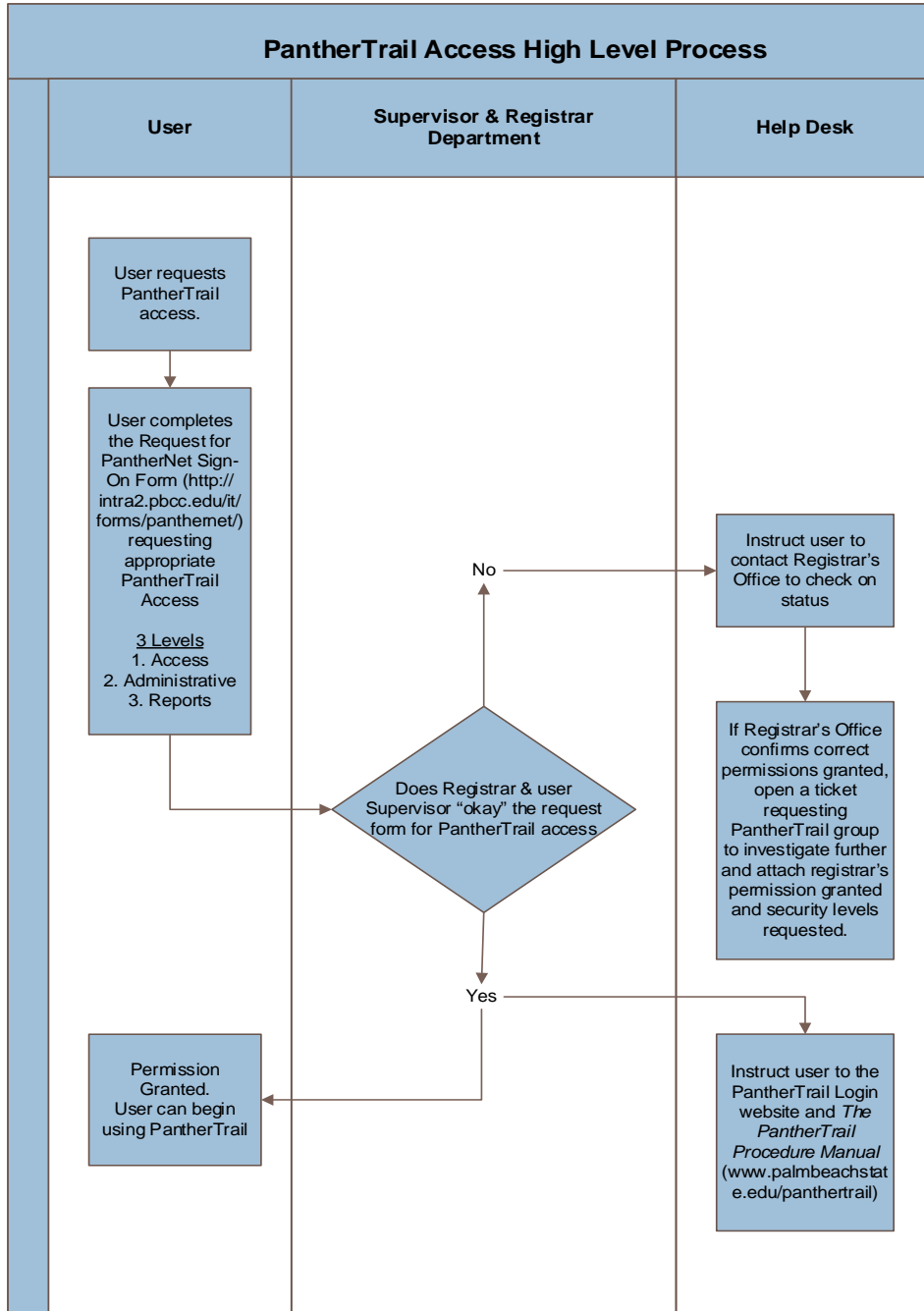
PantherTrail Procedure Document

PANTHERTRAIL SYSTEM

PantherTrail is a web-based tracking system that can be used with a swipe machine, data entry or touch screen monitor. It is used to capture and report data on student traffic, student purpose and/or activity data and employee time clock data via a monitored workstation.

PANTHERTRAIL HIGH LEVEL PROCESS

Below is a summary chart of the high-level process that this document explains in detail. Please note that this PantherTrail Procedure Document should be provided to employees requesting access to PantherTrail.



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REQUESTING PANTHERTRAIL ACCESS

1. First, complete the **FERPA** training online (<http://www.palmbeachstate.edu/admissions/ferpa/>).
2. Then you will need to fill out the following **PantherNet Access Form** to get access to PantherTrail. (see screenshot below)

For assistance in filling out this form, please call the College Registrar's office at ext. 13032.

Please check one.

NEW USER (New college employees) New User Start Date REVISED USER (Use when employee transfers to a new department or needs additional roles)

USERID (if known): Date:

Last Name: First Name: Employee#:

Campus: Lake Worth Dept: Work Phone:

Title:

Brief description and unique duties of the user's job:

If this new user replaces a previous employee, please indicate the name of the previous user here:

(If providing this information, you are not required to check any of the following options.)

For each module requested, check the box on the left and corresponding button on the right that apply. Only those modules with checked boxes will be recognized.

Module Title	Add Security	Delete Security
<input checked="" type="checkbox"/> DISPLAY STUDENT, REGISTRATION, CURRICULUM, FACILITIES SCREENS (assigned to all approved staff)	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/> ACADEMIC ADVISEMENT SYSTEM	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/> ADMISSION / REGISTRATION	<input type="radio"/>	<input type="radio"/>

PantherNet Student System Application Access Form - Microsoft Internet Explorer provided by Palm Beach Community College

CLASS CURRICULUM SYSTEM

DISABLED STUDENT SERVICES SYSTEM (ADA Staff only)

FACILITIES SYSTEM (schedulers only)

INTERNATIONAL STUDENTS SYSTEM

PLACEMENT AND TESTING SYSTEM (Admissions and Testing Staff only)

PROSPECT AND DISPLAY SYSTEMS

PANTHERTRAIL ACCESS PTACC

PANTHERTRAIL ADMIN PTADM

PANTHERTRAIL RPTS PTRPT

TRANSCRIPT EVALUATION SYSTEM (Transcript Evaluators only)

VETERANS AFFAIRS SYSTEM (VA and Financial Aid System only)

PantherCoas Interviewer

OTHER

OTHER

Hiring Administrator's Information:

Name: Date:

E-Mail: @pbcc.edu Phone:

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3. You can find this form, by going to Intranet, College Forms - <http://intranet.palmbeachstate.edu/> or on the PantherTrail Login page then select '**Student System**': Student Records, Registration, Curriculum, and Facilities.
4. Complete this form in its entirety and select **one, two, or all three** security level access groups, (PTACC, PTADM, or PTRPT) described below:
 1. **PANTHERTRAIL ACCESS PTACC (Log in/search for students)** – access to the search function of the student database and ability to swipe and login/out of PantherTrail. This also gives access to Employee Time Clock which can be used for employees to Login/Logout via a monitored workstation.
 2. **PANTHERTRAIL ADMINISTRATION ACCESS PTADM (Administrative functions)** - ability to change administrative tables and settings in PantherTrail. This level is used by super users or managers.
 3. **PANTHERTRAIL REPORTS PTRPT (Run PantherTrail Reports)** - ability to see PantherTrail data and run reports. This level is used by super users or managers.

*Note: New Campus Security Staff, please remember to add security to 'Other: Campus Security'. This allows you to access PantherTrail College Security functionality.
5. Once you have completed the form, press the 'SUBMIT' button to send your request.
6. From there, your request is sent to your Supervisor & the Registrar Department for their approval. Once approved by your supervisor, the Registrar Department will grant the approved access.

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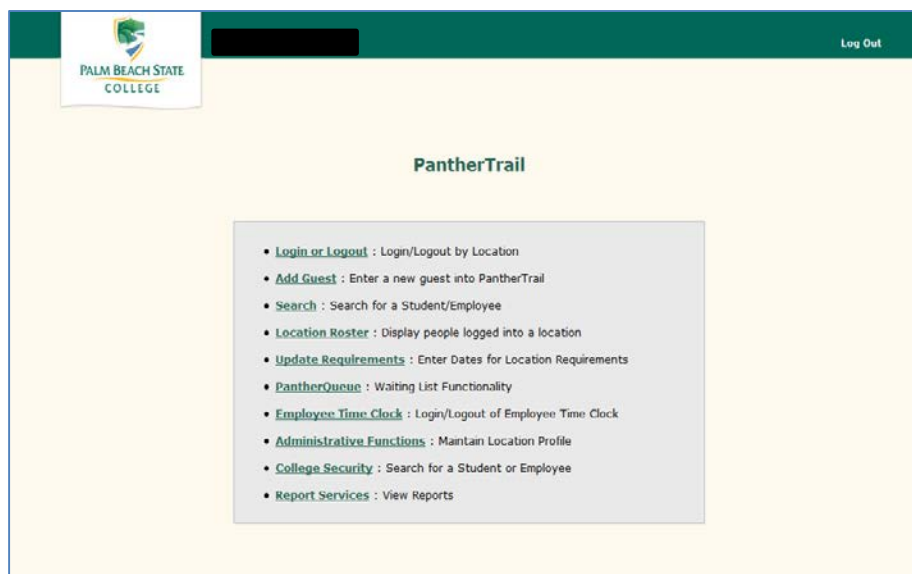
USER INSTRUCTIONS FOR PANTHERTRAIL SYSTEM & REPORTS

1. Once you have completed the directions as described above and your request has been approved & processed, then the PantherTrail application is a web based application that can be accessed through the Intranet Web Utilities Link or the Faculty Staff Resources webpage.
2. Log in using your network ID and network email password.
3. If you don't have access you will get the following error screen:



4. If you do have access you will be able to see the PantherTrail Main Menu. Please select your desired function from the **PantherTrail Main Menu** (see screenshot below)

Note screenshot below is for someone that has full PantherTrail Security Access and your menu could look different



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Login or Logout (Student or Employee)

- An Employee or Student can swipe their PantherCard or enter their student/employee Id to Login/Logout by Location
- Location Information (Campus, Type, & Subtype) must be set prior to Login/Logout
- Optional ability to set a List 1 is also available.
- Ability also to Add Guest or be directed to the Employee Login Page from the Login screen
- After Login/Logout button is selected either a Login screen or Logout screen will appear:
 - Login screen –
 - Allows students or employees to select the purpose of their visit along with any additional list requirements.
 - Photographical identification will also display
 - Last term attended as well as if a student is currently enrolled, their primary objective and schedule will also display.
 - Employee Title, Active/Inactive Status and Assignment End Date will display for Employees
 - A Successful Log In message will briefly display
 - Logout screen –
 - Displays Student/Employee/Guest ID, Name, Location, Purpose & List 1 – 6 (if selected).
 - Also displays when the student/employee logged in, the current logout time and the amount of time in location.
 - Allows student/employee the option to “Edit” their purpose selection prior to logging out.
 - Logout, Logout and Print and Cancel button selections display for logout processing
 - A Successful Logged Out message will briefly display

Add Guest

- Used to enter new guest into PantherTrail
- New students will not show up on the system until the next day and can log into the system with their student number in the phone # field instead of a phone number. This will keep the student records accurate for reporting purposes.
- At least 2 characters of the First & Last Name need to be entered along with a 10 digit phone number or a Student ID.
- Additional information such as Email and Comments can also be entered.

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Search

- The search function can be used to photographically identify the student/employee and determine the student's or employee's number if they have lost or misplaced their PantherCard.
- You can put in the Student's/Employee's full last name and the first few characters of the first name to narrow your search. The search is performed by looking up the last name then the first name. A partial last name may yield incomplete results.
- PantherCard Search Results will appear if searching by partial name. The Student/Employee ID, Last Name, First Name, MI and Currently Enrolled Term will also display if found. Hovering over the Student/Employee ID will display a picture or No Image Available if not found.
- Click on the Student/Employee ID and PantherCard Search Record will appear. The Student/Employee ID, Name, Title, E-mail, Last Attended, Currently Enrolled & Student's Primary Objective will display along with their PantherCard ID/picture. Click on the Student/Employee ID and it will be carried over to the Login screen.
- Clicking on the E-mail link will use the PantherTrail e-mail application and clicking on the envelope next to the e-mail will use your system default e-mail application.

Location Roster

- Displays students/employees logged into a location.
- Location Information (Campus, Type, and SubType) must be set prior to selecting Refresh Location Roster.
- Location Roster Information shows how many students/employees are currently logged in, Student ID, Employee ID, Name, Date/Time, Guest, Photo, Emergency Contact Name, Emergency Contact Phone Numbers & Purpose.
- Click on the Student/Employee ID to be directed to the PantherTrail Logout page.

Update Requirements

- View & Update Requirements for a location Type.
- Location Information Type needs to be set prior to viewing/updating requirements for student/employee.
- Date & Time will display for Requirement when set to yes & updated.
- Click on the Date & Time box to use the Current Date & Time and Update Requirements.

PantherQueue

- **Student Self Login-** When configured for a Location, it allows a student to log themselves in from a public terminal provided by the Location into a queue. A guest can also type in their information on this page by clicking the Login as Guest button at the bottom of the page and place themselves into the queue.

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Configuration is done on the Maintain Location page. Before allowing student access to the page, remember to Lock it by clicking the 'Lock This Page' button.

- **Queue-** This is a tabbed page that separates queued (waiting) users from those that are active at a Location. The Queue can also be shared between Locations that may share a lobby. The 2 tabs can be configured for different Locations. The Location Roster tab is similar in function to the Location Roster page accessible from the main PantherTrail menu and can be used even if the Queue functionality has not been configured. Users can be logged in/out from either tab. Users can also be moved from one tab to the other by using the button displayed in the Purpose column of the user. A context menu (right-clicking any column heading) will allow access to other columns not visible or allow a column to be hidden if not desired. Columns can also be dragged into a different order than they appear by clicking the column heading and dragging the column to the desired location. Configuration of this feature is done on the Maintain Location page.
- **Display-** This page is designed to be displayed from a large monitor/TV that is in view of the Location waiting area and will display users that are in the Queue (waiting). Configuration of this feature is done on the Maintain Location page. Running your browser in Full Screen mode will enhance the look of the page by hiding the browser top and bottom bars.

Employee Time Clock:

- This feature is to Login/Logout Employee's via a monitored workstation. If a supervisor grants PantherTrail Access and allows individual employees to Login/Logout using Employee Time Clock, it is the supervisor's responsibility to verify the employee's time and attendance.
- Employees must swipe their PantherCard or type in their Employee Id to login or logout.
- Location Information (Campus, Type, and SubType) must be set prior to selecting Employee Login/Logout.

Administrative Functions

- **Maintain Type and SubType-** Administrative employee has the ability to add a Type, update a Type and a SubType to a location. Update Type is where the administrative employee will update requirements (up to 4 requirements) for a type.
- **Maintain Purpose-** Administrative employee has the ability to add or delete a Purpose. *Please be advised that a Purpose could be used by another location so please do not delete unless you are sure no other location is using that purpose. To see if another location is using a purpose, select the checkbox of the Purpose(s)

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and then select View Dependencies. This will open a window showing which locations, if any, are using the checked Purpose(s).

- **Maintain Location-** Administrative employee has the ability to maintain a Location through adding and/or removing available purposes. The ability to also activate/inactivate a location can also be done on this screen. Administrative employee can also update Class, and if List 1 – 6 is required. The number of hours for automatic logout from a location is also set on this screen. A valid Sort Order has to be entered in order to add or update a purpose. The Student Self Login and PantherQueue features are also configured here. Remember to save your changes by clicking the Save Location Settings button when you are done making your changes.
- **Maintain Lists-** Administrative employee has the ability to add and remove items to List 1 - 6. Select a Campus and Type, the List Number values will display. From there you can view, remove and add items to each list.

College Security (this function is only available to Campus Security Staff)

- Search for Student/Employee or Search by Location
 - To search for a Student/Employee, provide an ID or the full last name and the first few characters of the first name to narrow your search. A decal number can also be used to search for a Student or Employee. Decal # accepts a wildcard * value.
 - College Security Search Results will display when partial name or decal number is entered.
 - The following is displayed when partial name is used: Student/Employee ID (hover over to see picture), Last Name, First Name, MI, Currently Enrolled (No, N/A, or Term)
 - The following is displayed when partial decal number is used: Student/Employee ID (hover over to see picture), Expire Date, Issue Date, Decal #, Tag, Year, Make, Model, and Color.
 - Click on the Student/Employee ID to display College Security Search Record.
 - College Security Search Record will display when a Student/Employee ID or Decal # or Full Last/Full Name is entered & found or selected from the College Security Search Results page.
 - The College Security Search Record has 6+ potential tabs that can be displayed. Main, Contact Information, Term Schedule(s), Activity Records, Decals, and Citations. The number will display

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next to Activity Records, Decals & Citations to help identify how many exist in each category.

- To search by Location, provide the Campus and Type then specify a date range. This search will only allow you to select dates within 2 weeks of the Start date.
 - College Security Search Results will display with a list that contains up to 100 of the most recent activity records in descending order by Sign In time.
 - The following is displayed: Student/Employee ID (hover over to see picture), Last Name, First Name, MI and Currently Enrolled (No, N/A, or Term). Click on the Student/Employee ID to display the College Security Search Record page.
5. Once you have **PTRPT** PantherTrail Security Group access granted, a Reporting Services option will also be available to you from the PantherTrail Main Menu. Remember any information you determine from an ad hoc query must be validated via the Institutional Effectiveness department prior to being released.
 6. Once you have accessed the Report URL, you can select a report from the list of PantherTrail Reports that best suits your departments' needs. A description of each report is provided under each link.

The report viewer window will open allowing you to select the criteria from drop downs menus. Wait a couple seconds for the system to generate the report. **TIP:** The smaller your span of selection criteria, the faster it will generate. Also if you don't put in any criteria in the parameter it can get stuck trying to generate a large amount of data. So remember to put in dates and your selected parameters.

Then the report will generate with the parameter criteria you selected and you can export reports to Excel, Word, PDF, etc.

IF YOUR DEPARTMENT WANTS TO START USING PANTHERTRAIL, FOLLOW THE BELOW STEPS:

ACCESS: *ALL* employees in your department who would like to access PantherTrail must follow the process outlined in the beginning of this document for requesting access. Make sure at least one employee from your department has "Administrative Access" and all employees accessing PantherTrail have reviewed this document. If a supervisor grants PantherTrail Access and allows individual employees to Login/Logout using Employee Time Clock, it is the supervisor's responsibility to verify the employee's time and attendance.

OPERATING EQUIPMENT:

PantherTrail is a web-based tracking system which requires access to a PC and the internet. Once accessed, PantherTrail can be utilized by typing in the Student/Employee ID or by using the following equipment:

- **Swipe Card Reader:** Your Department can request/purchase a swipe card reader. To purchase a swipe card reader that is compatible with PantherTrail please go online to

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Information Technology Assistance Center; Forms; Computer Equipment; Hardware Technology Standards & search for Card Reader - <http://www.palmbeachstate.edu/helpdesk/forms.aspx>

- **Touch Screens:** Touch screens are available where it makes sense such as, for non-manned stations. To purchase a touch screen please contact the Computer Resource Manager in the IT Networking Group.

CUSTOMIZE PANTHERTRAIL FOR YOUR DEPARTMENT: Once access is granted, your PantherTrail Administrator (employee who requested PantherTrail Admin Access for your department) can set up your location. Your location can then be customized with site-specific purposes and lists.

FREQUENTLY ASKED QUESTIONS

1. **How do I access PantherTrail?** Complete FERPA Training and the PantherNet Access Form and select your desired PantherTrail security group. It will take a little time for your access to process.
2. **How do I access PantherTrail reports?** Request to be in the **PTRPT** Security Group on the PantherNet Access Form. You need to use internet explorer for reports.
3. **Is PantherTrail available to everyone?** Yes, PantherTrail is an application that is available to college employees once security access is approved by Registrar.
4. **What do I do if there is a problem not covered in this document?** Please contact the Help Desk 561-868-3100 if you have any system problems. For assistance in filling out the PantherNet Access Form, please call the College Registrar's office.
5. **Is there an auto logout function?** A nightly batch process will automatically logout any student who did not logout during the day. The logout timeframe will currently default to one hour or you can set the automatic logout time for your location in Administrative Functions, Maintain Location from the PantherTrail Main Menu.

ERROR-AVOIDING TIPS

- When using the PantherTrail System, be sure to use the mouse to make selections and try to avoid using the back button. When you use shortcuts or the back button, it can throw off the system and creates errors. Also be sure to use Internet Explorer 9 or higher.
- When using PantherTrail Reports try to select narrow parameters to make report generate faster. If you select no parameters the system will try to pull all data records into the report and could freeze system. Only pull specific data you need.
- Be sure that at least one employee in your location requests Administrative Access when completing the PantherNet Access Form.