3.0 STANDARD EDITION & ENTERPRISE EDITION

Welcome To
IDK Tech Room

VISITOR
VOLUNTEER
CCS EMPLOYEE
SUBSTITUTE

Tardy
Early Check Out
MEETING

Check Out

IMPORTANT CONTACT INFO
Director’s Name:

Director’s Phone Number:

National Office Tech Support: 1-800-890-1000 option 2

Support can also be reached by emailing Support@identakid.com or through our Chat option on our support page support.ccssvm.com

District Account #: 

School Account #: 

IAKVM e-Registration Username: 

Email: 

Password: 

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**Introduction**

Ident-A-Kid’s Complete Campus Security Solution Visitor Management (IAK-VM) software is an easy-to-use and versatile program designed to be used as a kiosk for visitors to sign themselves in, or attended at the secretary’s desk for the
secretary to check visitors in. Schools can limit traffic to just certain visitors and/or keep track of virtually all entry and exit data for reporting. This guide will show you some of the software’s features that can be tailored to your school’s needs.

Standard Edition 3.0 is our web enabled version. Each school is allowed up to five client computers and three managers. Since Standard Edition is web enabled with multiple clients, this version is best for schools with multiple entrances that require school wide reporting. All databases are held in the cloud and a steady internet connection is required. If you do not have reliable internet, please call us for a compatible version of IAKVM for your school.
Initial Setup

System Requirements

- Windows 7/8.1/10
- 2 GHz 32-Bit (x86) Processor or faster
- Minimum of 2GB of RAM for Windows Vista, 7, or 8; 4GB for Windows 10
- Minimum of 500MB of available hard drive space
- Keyboard and Mouse or some other compatible pointing device (Touchscreen is also compatible!)
- Video adapter and monitor with SVGA (1024 x 768) or higher resolution
- Sound Card (Optional)
- Speaker (Optional)

Installing from the Web

- To download the latest software please visit: https://visitormanagement.identakid.com/v3/
- Please make sure to install prerequisites first, the software, and any patches that may be released

Support

- For help, please call your local director. If you do not have one, please call the national office tech support line on page 2, or visit our helpful support page. To see if there is a local Director in your area, go to http://identakid.com/find-director

- For extensive Web support, visit https://support.identakid.com/
- You will find:
  - Videos for all aspects of IAKVM from installation to using devices and troubleshooting.
  - Registration site and all downloads.
  - Assistance in finding your local Director.
  - FAQ, Answers and Tech Tips.
  - Live chat room with our techs.
  - Updated User Guide for your software.
Registering Your Software

After installing IAKVM on your computer, it will run on a 30-day trial license. After this trial period, software use will require a standard license.

Please call 800-890-1000 option 3 to place your order, or fax over a P.O./order form to 727-576-8258. Ordering online and fax order forms can be found at https://visitormanagement.identakid.com/shop/. Once you order, you will receive an invoice with a Promo Code. You will need this to activate your registration.

Activate your Trial/ Upgrade

Please make sure IAKVM client and Manager are downloaded first.

Running IAKVM for the first time — When running IAKVM for the first time, please right click IAKVM Client and select Run as Administrator. This will allow the system to merge all current data and settings when upgrading from 2.10. Select whether you will be using Standard Edition 3.0 for school use, or Enterprise Edition for district use.

ENTERPRISE VERSION

For Enterprise select the Enterprise Version for District use and click Next. Please make sure you ran the software as administrator. Enter your case sensitive District license code and District Account Number (from the District Administrator’s email), click Next. You will then follow Standard Version instructions #4.
STANDARD VERSION

1. For Standard Version please select Standard Version (Internal Use Only) and click “Next”. Please make sure you ran the software as administrator.

2. This screen will recognize whether you have a standard license found or not. Please enter in your location name (i.e. front desk, staff check in) and click “Next”.

3. If No License Code is found, it will then prompt you to enter your School Name. Please do not put your District Name. This will start your trial.

4. Confirm you are connected to the internet. Your registration is now complete.

5. Right click IAKVM Client and “Run as Administrator” again to merge all settings and device registrations, if previous customer. You will receive an email shortly with your School Account Number.

6. You will need to register the IAKVM Manager. Right click the IAKVM Manager and click “Run as Administrator”. Please follow through the screens until you get to the license code screen. Please enter the License code you just received, your School Account Number and, if Enterprise, the District Account Number. Please click “Next”. You are now registered for your trial.

7. Please right click IAKVM Manager and “Run As Administrator” to merge all settings.

8. If you did not merge an active license or activate an Enterprise license, please go into your Manager Module and click “Activate License”. Please create your account process your promo code to register your 1, 2, or 3-year license. Please email License@identakid.com if assistance is needed.

9. Create your Web Manager Account. While setting up your school Client and Manager you will have received an email to create your Ident-A-Kid Account for the Web Manager. Please see the Web Manager userguide on how access this account, add other school users, and generate reports.

https://support.identakid.com/getting-started/user-guides/
Sexual Offender Auto-Check

A. Prerequisites
1. You must be connected to the Internet.
2. IAKVM brand Driver's License Scanner registered.

B. Settings
1. Go to the IAKVM Client. Then select the badge category desired for “Sexual Offender Auto-Check” (ie: Visitor).
2. Select the “Capture Devices” tab.
3. Under Scanner, choose “Req'd at Check in”.
4. Check boxes labeled “Sexual Offender Auto-Check” and “Add Preloaded Visitors to Preloaded List”. Select scanner type (Feed or Optical)
5. Do this for all badges you want to use for Auto SOC by following steps 1 through 4 again, click “OK”.

C. User Procedure
1. From IAKVM Client Welcome Screen, select the appropriate badge category (ie: Visitor).
2. The scanner will be live. Scan your driver's license. A data window will pop up.
3. Confirm the data is correct and click “OK”. If the driver's license fails to scan, name and DOB can be manually entered into a pop-up data window. If the visitor does not have a driver's license, click “No ID Card”, enter the password (default CCSS, meant for secretary input), then manually enter the data in the pop-up window. Click OK.
4. Fill out any other required data (ie: Reason for visit, etc.). Sexual Offender Auto-Check is being performed while other fields are being filled out.
5. Click “OK”. If Sexual Offender Auto-Check result is negative, a visitor badge is printed as normal. If result is positive, the Alert message appears and alarm sounds. The secretary or administrator must then type the Override initials preset into their system (see Default settings, NoGo Lists) and a data window will appear with the data retrieved including photo, name, DOB & Status. If the data retrieved is a false positive, click “Authorize Check-in”. Otherwise, click “Deny Entrance” and contact an administrator if needed. To test this feature, click No ID Card and use the name a DOB provided: Bob King, DOB 01/01/1970. Alerts will be went to the Web Manager and email for approval for all Enterprise Customers.
Manager Settings

Default Settings

Before using your IAKVM Software, you’ll need to adjust some settings within the Manager and Client Modules to customize the system for your use.

THE DEFAULT PASSWORD IS “CCSS”.

This case-sensitive password is used any time the program asks. **Remember it and write it down!** If this password does not work, please call Tech Support at 1-800-890-1000 option 2.

### Global Settings

Select the “Default Settings” button from your IAKVM Manager Module front screen.

### Global Settings 1

Your School name is prepopulated into the settings from registration.

Please enter your local Ident-A-Kid Director Name, Director Phone Number, and Director E-mail. You will be able to “Enable” or “Disable” the “Force Uppercase” option and “Activate Internet Links”. “Skip Quick-Check Out Form at Check Out” will allow the visitor to select their name from a drop down of all visitors instead of entering their badge number in. “Hide Middle Name Placeholder” can be enabled for schools not using Automatic Sexual Offender check and do not need to capture the middle name.

### Badge Customization

All 7 badges are fully customizable, all the way down to the title. That is because all badges are independent from each other. These badges can be enabled and disabled from the Manager Module.
Global Settings 2

Report Printer

In order to view and print Reports from the application, you must select the printer you want to use here. If no physical printer is available, you may select a virtual printer (e.g. Microsoft XPS Document Writer, Adobe PDF, CutePDFWriter) or install your own. Reports may also be pulled from the Web Manager.

Main Graphic

Choose between the “Instant Predator Check” logo, our default logo, or choose “None” to disable it. (For custom logos, replace “MainGraphic.gif” in the installation folder and choose “Default”.) You may change the link the main graphic links to under “Main Graphic URL”.

Auto-snap

This option only works when checking in under a badge that has the webcam enabled. When enabled, the “Take Photo” button is removed; photos are taken when clicking “Check-In”.

Include RFID Users at Check In

RFID JiffyPass users’ names are pre-loaded into their assigned badges. Any keyfobs/cards entered into the system will appear in their respective badge’s Name drop-down menu.

No Go Match Message/ NoGo List

When a person in your “NoGo List” tries to check in or out, IAKVM will halt and display a message. To add people to this list, type or copy/paste their names into the text box under “NoGo Lists” tab. Names must be added as exact strings to be flagged within the system (i.e. Last, First Middle) To override a halt, 3 characters must be entered in the lower-right corner of the message window (e.g. secretary’s first, middle, and last initials). Once override initials have been entered the administrator will be able to Approve, Deny or Cancel the check in. These override initials are case sensitive. Enterprise users may review NoGo Alerts via the Web School Manager.
**Button Settings**

**Title & Description:** Set the badge title as desired. You can add a description that will appear below the title on the main screen (i.e.: badge name in Spanish).

**Name Label Prefix:** Set what you’d like to appear before “Name” when the badge is clicked (“Parent’s”, “Student’s”, etc).

**Message Board:** This message is displayed when clicking a badge, useful for posting bulletins such as upcoming school events and visitor instructions.

**Display Buttons:** Select what buttons will be displayed at the bottom of this badge’s window. Choose based on what this badge is supposed to do.

**Check-In Only:** This badge is only for checking in. Use the “Check-Out” button when checking out.

**Check-Out Only:** This badge is only for checking out. (i.e: Early Dismissal)

**Check-In/Out:** This badge is for both checking in and out. Names will not appear in the “Check-Out” screen.

**Elapsed time (in Reports) is not calculated when using this option.**

**Each badge has 4 tabs in the manager.**

**Additional Information 1 & 2**

These tabs allow you to set optional fields for information when a person checks in or out of IAKVM (e.g.: “Reason for dismissal” or “Destination”). Users can type in their own answers, or use the “Answers” box to add selections to the drop-down menu on the badge.

**Enable Freeform Entry -** Uncheck to force users to select only what answers you provide.

**Required? -** requires this information is supplied in order to use a badge.

**Printed? -** prints their answer on a label (if badge printing is enabled).

**Displayed? -** displays the field on the badge. Uncheck to hide this field.

**Display at Checkout? -** displays their answer in the “Check Out” screen.
**Names to Pre-load**

Select the list of preloaded names to prepopulate for this button. Lists will be established from running the Automatic Sexual Offender Check and from importing lists under the “Preloaded Lists” button in the Manager Front Screen.

**Check In/Out**

Auto logout - This feature is useful if people forget to check out when leaving.

- **Absolute** - Users will be automatically checked out at the set time.
- **Relative** - Users will be automatically checked out after this much time.

**Preloaded lists**

In the IAKVM manager you can import and manage all preloaded lists. Here you can add a new list, manage the records of a current list, rename and delete a list. Pre-Approved Visitors (SOC) is a standard list prepopulated by buttons that have enabled Automatic Sexual Offender Checks.

School lists can be imported by adding the “Category”, selecting “Manage Records”, select “Tools”, then import users. Format will be CSV file with exact values for each column. Instructions are available under Help → General, or add a user first, then use the “Export” option, make your changes and save the file, then use “Import”.

To add users one-by-one, select the category, select “Manage Records”, then “Add User”. Each user has First, Middle, Last name and 7 additional fields for the school to prepopulate.

**Importing lists for Names to Preload**

You will need to use the format listed below within a CSV file. Go to tools and Import to select your CSV file. See [https://support.identakid.com/knowledgebase/tips-from-our-technicians/](https://support.identakid.com/knowledgebase/tips-from-our-technicians/) for added tips on preloaded lists.

Line1: "CategoryName"

Line2: "LAST NAME", "FIRST NAME", "MIDDLE NAME", "FIELD1", "FIELD2", "FIELD3", "FIELD4", "FIELD5", "FIELD6", "FIELD7", "FIELD8"

For **STUDENT**, preloaded list the category line is defaulted.

"STUDENT ID", "LAST NAME", "FIRST NAME", "MIDDLE NAME", "FIELD1", "FIELD2", "FIELD3", "FIELD4", "FIELD5", "FIELD6", "FIELD7", "FIELD8"
This section allows you to assign JiffyPass keyfobs and cards to parents, teachers, and staff.

1. Select “RFID JiffyPass Management” from the Manager Module menu.
2. Click “Add User” to start.
3. Choose a “Badge Type” from the drop down menu.
   
   These match the ones on the Client main screen and in Default Settings. Each keyfob or card may only be assigned to one badge category. e.g. Staff members keyfobs could be assigned to the “STAFF” badge category.

3. Enter their First, Middle and Last Name in the boxes below. You have 7 additional fields for information for each user.
4. Click the “Card ID” text box and scan the RFID keyfob or card.
5. Click “Save” and add another user, or click “Done” when finished.

JiffyPass users can be added more quickly using the “Import” and “Export” options from the Tools menu (upper-left corner). This function uses a .CSV file (spreadsheet) with exact values for each column.

**Import Users:** You can use this option to import a batch of users at one time. In order to import the users, the file has to be a csv file. The following is an example of what it should look like:

"CARD ID","BADGE TYPE","LAST NAME","FIRST NAME","MIDDLE NAME","FIELD1","FIELD2","FIELD3","FIELD4","FIELD5","FIELD6","FIELD7","FIELD8"

The first line defines the column names - this line must be present. All four column names must be spelled exactly as shown and must be present. The order of the columns is determined by the first line. If the specified badge type doesn't exist, that person’s name will not be imported.

You can get the card ID by scanning your JiffyPass Badge or keyfob when you are setting up your file. The JiffyPass Scan Station must be connected to the computer that you are using to set up the file.

(Some spreadsheet applications like Excel auto-format cells based on your data. Some RFID keyfobs and cards have leading zeroes which Excel normally truncates. To avoid this issue, right-click the “CARD ID” column and click “Format Cells”, then choose “Text” and click “OK”.)
Reports

Reports can be pulled at the Manager Application or at the Web Manager Activity Report. Here you can run reports on all check in/out data.

Select your Source Data
“Current Data” (default, recommended) uses all active data in the system.

Select your desired filter(s)
Choose one or more filters by clicking its checkbox or using the field(s) next to it to specify your search.

Use the “Occurrences” field to show people who have checked in a certain number of times, useful for keeping track of students who were tardy repeatedly over a certain period of time.

Check the “Print Photos/Scans/Signatures” or “Show Images” checkbox to display any of these items (if available) with your results.

Export Report
Saves the report to a .CSV file (spreadsheet) that can be modified. Images will not be included when using this option. The Web Manager saves as TSV.

View Report
Preview and print the report within PDF format.

Who is at the School Now?
To view who is checked at this time within the school, select this button from the IAKVM Manager Module.

Absent RFID Users Report
Select this report from the IAKVM Manager module to see which RFID users have not checked in at this time.
Client Module Settings

Registering Devices

Now that your buttons are set up through the Manager, you can register your devices to your client, Enable/Disable buttons and devices per client station.

Register Your JiffyPass Reader, Signature Pad, and Driver's License Scanner

To watch a step-by-step video please go to [https://support.identakid.com/videos/additional-hardware-setup/](https://support.identakid.com/videos/additional-hardware-setup/)

3.0 has Automatic Registration for Devices within the Client

Go to “Help” – “Add Device License” and enter in the serial number (found on bottom of device).

If you have an old device and do not have a serial, please email serials@identakid.com with your purchase information and school information. They will email you a serial to use. The license code will be automatically generated and entered into your IAKVM System.

You may remove a device from a Client computer (to move to another computer) by going to “Help” – “Remove Device License”. You will need to enter the same serial number it was registered with to remove it.

Client Default Settings

Go to “Utilities” – “Default Settings” to modify the Client Module’s settings. The default password is “CCSS”.

General Options

- Printing - Enable or disable printing a label.
- Graphic - Print the webcam photo, include a custom graphic, or none.

Paper

- Printer - Choose the appropriate Dymo printer for this badge.
- Number of Badges to Print - Print this many labels each time.
- Size - Choose “IAK Labels” (stickey) or “Tardy Pass Tape”.
- Source - Choose the correct printer.
- RFID Options - Auto Print Badge at Login
Device Settings

Web Cam/Driver’s License Scanner/Signature Pad
Req’d at Check-In - This device is enabled and required to use the badge.
Not Req’d - This device is enabled but can be ignored when using the badge.
Off - Disable this device for this badge.

RFID Options - Check In/Out Mode
Automatic - (recommended) scanned RFID users are checked in or out based on whether or not they’re already checked in.
Manual - requires a selection every time an RFID user scans in or out.

ID Scanning Options
Sexual Offender Auto-Check - Select this button if you have a driver’s license scanner and would like to run automatic Sexual Offender checks for this badge. (must have Scanner set to Req’d at check in)
Add Approved Visitors to Preloaded List - We recommend keeping this enabled. This will add all scanned approved visitors to the Approved Visitors list as preapproved for their next visit.

Add Off-site Hours
To add off site hours for all buttons, select “Utilities” - Off Site Hours. You will then want to select the badge you are adding hours for. This will prompt you to Enter Visitor information and additional information and select Check Out.
You can then enter the offsite hours in time, or select the dates and log in/out times. These hours will now show in your reports. This is useful for offsite volunteer hour tabulation.
Checking-In/Out

Check In
Click the appropriate badge from the main screen. Enter the required information displayed. If Driver’s license scanner is enabled, it will be live and this must be done first.

[Signature Pad]
Sign your name and click Save.

[Driver’s License Scanner]
Feed Scanner - Insert your ID photo side up and click “Scan ID”.
Optical scanner - hold the barcode of your license to the scanner and click “Scan ID”.
After it confirms the ID information, you may insert the license face down and click scan ID to keep the image of the Driver’s License on file with the feed scanner.

[WebCam]
Click “Take Picture”. If button doesn’t exist, skip this step, the picture will be automatically taken when you select “Check-In”. Click “Check-In”. If configured, a label will be printed for you.

Check Out
Option 1
Click the red “Check Out” button on the main screen, then select your name and click “Check Out”.
(Names will only appear here if badge is set to Check In Only.)

Quick Check-Out Option
Click the red “Check Out” button on the main screen, then enter your badge ID.

Check In/Out with RFID Keyfob or Card
Swipe keyfob/card over the JiffyPass Scan Station. The system will greet you and display your name briefly on the screen. Swipe again to check out.
Optional Equipment

**DYMO Label Writer**
This is used for printing both visitor labels and tardy passes. If you’re setting up a DYMO for the first time, follow these steps:

Plug in the DYMO printer.
Download the latest driver from:
[https://support.identakid.com/troubleshooting/downloads-device-drivers/](https://support.identakid.com/troubleshooting/downloads-device-drivers/)
Configure your badge to print, select the DYMO and paper size.

**Webcam**
This is used to store photos which can be printed on badges and in reports. If you’re setting up a webcam for the first time, follow these steps:

Plug in the webcam.
Download the driver from:
[https://support.identakid.com/troubleshooting/downloads-device-drivers/](https://support.identakid.com/troubleshooting/downloads-device-drivers/)
Enable the webcam for your desired badge(s).

**Signature Pad**
This is used to store signatures of visitors which can be printed in reports. If you’re setting up a signature pad for the first time, follow these steps.

Plug in the signature pad.
Register it to your IAKVM installation. (Pg. 14)
Enable the signature pad for your desired badge(s).

**Driver’s License Scanner**
This is used to scan driver’s licenses (and other forms of picture ID) of visitors which can be printed in reports and used for the Sexual Offender Auto-Check. If you’re setting up a Driver’s License Scanner for the first time, follow these steps:

Plug in the driver’s license scanner. The optical scanner will not require a driver to be installed.
Download Feed Scanner driver from:
[https://support.identakid.com/troubleshooting/downloads-device-drivers/](https://support.identakid.com/troubleshooting/downloads-device-drivers/)
Enable the driver’s license scanner for your desired badge(s).

If you are using the Sexual Offender Auto-Check, please make sure the “Scan Sexual Offender Auto-Check” box is checked in your default settings. Also, make sure your default settings require a driver’s license.
Enterprise Module

Enterprise Edition is our District-Wide version for Ident-A-Kid’s Visitor Management System. This allows the school district District-Wide reporting, Global Settings, and centralized licensing.

Licensing

Your account and license will be processed at the National Office. All schools within your district will renew and be licensed under one District account with one common expiration date. Your District Administrator of IAKVM will receive the District Account Number, Log In Credentials to the District Administrative Module and the District License code. Please follow instructions on page 7 for registering each school. Your license information will also display within each schools Web Manager under the subscription page.

Please log in with your District Administrative Module credentials at Identakid.net/DISTRICT

When you are done registering all schools, log into your District Account and go to Settings—Associate School. Make sure you select all schools and save changes. This will connect the school to your account. Any time you add a new school, you will need to Associate them to your account.

District-Wide Reporting

Select your Filters

Choose one or more filters by entering text into the field underneath to it to specify your search.

You may specify school or visitor type, by selecting an option from the drop down, or leaving it at all.

Use the “Occurrences” filter to show people who have checked in a certain number of times. Useful for keeping track of students who were tardy repeatedly over a certain period of time.

You may also sort your report by any piece of information captured.

Select A data source to display Student, Staff or RFID ID numbers and additional fields.
Export Report/Download .CSV
Saves the report to a .CSV file (spreadsheet) that can be modified. Images captured at the school level will not be included when pulling this report.

Global NOGO List
The NoGo list can be uploaded via .CSV file. This will update each school's NoGo list to include these people. We suggest you format the .CSV file by Last Name, First Name Middle Name.

District Preloaded List
Manage Preloaded list of visitors for one or all schools. Create a Preloaded list category and all schools this list will apply to, and click Create.

Create a CSV file with same structure as an example below:
PreloadedCategoryName,FirstName,MiddleName,LastName,Field1,Field2,Field3,Field4,Field5,Field6,Field7
Staff,Jon,Smith,,,,,,,,
Staff,George,Frederick,Handel,Field 1,........
Or you can download excel file template, edit and save as CSV.

Once imported, you can edit the schools the list applies to or delete from the main dashboard. To Add new or delete existing users from a list, go to Settings – Import, select your CSV file with the new names, or the names to delete, and Action to Add New or Delete Existing.

All users can be exported by going to Settings and Export to CSV.

District RFID List
Import RFID users to your District Account to allow them to easily check in and out of every school under your account. Go to Settings- Label Settings to ensure all schools have a Staff or District Staff button for you to import these RFID users under.

Create a CSV file with same structure as an example below:
BadgeName,CardID,FirstName,MiddleName,LastName,Field1,Field2,Field3,Field4
,Field5,Field6,Field7
Staff,123456789,John,M,Gordon,Field1,......
IT,234567890,Rob,,Pike,Field1,Field2,......

Or you can download excel file template, edit and save as CSV. You will select your file, select Add New and Import to add new users. To delete users, create a CSV file in the same format with the users that need to be deleted, select the file, Action to delete existing and import. To assist with creating this list you can go to settings – Export list to see the current format of the users that need to be deleted.

Associate School
Lists your District Enterprise Licensing information. Use this, along with the School account number to install any clients and managers needed at your schools. New schools will not have school account number yet. Make sure the school has been selected and saved in this area to use your district license.

PowerSchool Plug In and Sif Agent Installer
Sync your student lists to Ident-A-Kid and send tardy and early release data back into your SIS in real time. This is an add-on feature available for PowerSchool and other School Information Systems that are SIF compatible. We are a PowerSchool Partner with approved badging for data synchronization through their API. We send the correct attendance codes, additional information and timestamp into your attendance table in real time. This works for all schools in Daily and Meeting attendance with flexible and block scheduling.

For other SIS, please email their support team to inquire if they have a SIF agent, are SIF compatible and what they will allow Ident-A-Kid to do. Most only allow us to sync student lists and keep them current.

Please email CampusSecurity@identakid.com to inquire about Enterprise and SIS connections.