



# Check-In

Configuration and Testing  
(SPoCs)



# On the Docket Today

- Platform Configuration
  - Rooms & Groups
  - Events
  - Configuration Settings
- Check-In Suite Configuration
  - Home
  - Check-In Kiosk
  - Kiosk Settings
  - Admin Console
- But **not** using Check-In and Reporting  
(*Because this gets its OWN webinar!*)



# Check-In: Configuration and Testing

## *Friendly Reminders ....*

- **Appearance:** Everyone's system will look different, and that's okay! If you see screenshots or demos in this webinar and aren't able to see the exact same thing in your system, that's expected.
- **Access** to Check-In Suite and the Admin Console is governed by security roles.
- **Audience:** SPoCs and those responsible for setting up and troubleshooting check-in.
- **After** configuration and testing, you'll use and report on check-in. There's an upcoming webinar on that!

# Why Check-In?

- Security
- Pick-up tags for minor children
- Name tags for anyone (or anything)
- Easy attendance
- Emergency roster
- Time tracking for workers/volunteers
- Tracking business meeting quorums





# Platform Configuration



# Rooms & Groups

## Rooms

- Add a maximum capacity to leverage the Auto Close at Capacity option.

## Groups

- Set up any Groups that will be checking in before you set up your Event.
- Make sure group members have the correct Group Role.
- Name tags are determined by both the Group and Group Role Type.

# Events - General Tab

## Check-in Information Section

- Allow Check-in: Yes
- Search Results
  - Allow Guests (Show Everyone)
  - Allow Expected Only (Show Everyone)
  - Allow Expected Only (Show Expected Only)
- Early Check-in Period: default is 60 minutes before the Event start time
- Late Check-in Period: default is 30 minutes after the Event start time

Check-in Information

Allow Check-in \*  
 Yes  No

Search Results \*  
Allow Guests (Show Everyone) 🔍 ✕

Early Check-in Period

Late Check-in Period

# Events - Rooms & Groups Tab

## Check in Suite Options Section

- Group
- Balance Priority
  - None: Set to 0
  - Fill Completely, then Fill Second Room: Set first room to 0 and second room to 1
  - Fill Evenly (every other Participant): Set both rooms to 0
- Closed
- Auto Close at Capacity

Check In Suite Options

Group

Balance Priority\*

Closed\*  Yes  No

Auto Close At Capacity\*  Yes  No



# Configuration Settings

**Want to use unattended mode? But also switch to attended mode?**

- Set up auto URL login credentials in Configuration Settings
- Administration > Configuration Settings
  - CIM, AutoLoginPassword
  - CIM, AutoLoginUsername
- Use these credentials to access attended mode for one search session. After one search, Check-In Suite will return to unattended mode.



# Check-In Suite Configuration



# Basic Info

- Bookmark = Easy Button
- Access is governed by your security roles.
- Log in using your Platform username and password.
- Printing name tags? You'll need to use a Windows machine to run the print service.

