

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

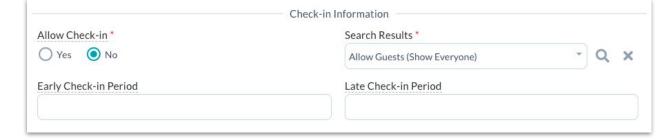
- Set up any Groups that will be checking in before you set up your Event.
- Make sure group members have the correct Group Role.
- Name tags are determined by both the Group and Group Role Type.



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

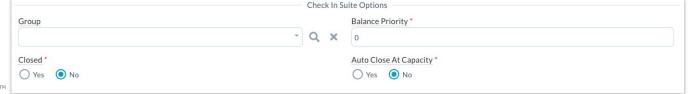




Events - Rooms & Groups Tab

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





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.

