

shelby

v.5

Quick Reference Guide

Check-In

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Introduction

What is Check-In?

Check-In is a software and hardware system that integrates with your Shelby Systems Database Management software. Its purpose is to regulate the coming and going activity of the attendees of your organization.

One of the most powerful features of Check-In is that it can be configured to allow the members of your congregation to check in and out themselves, freeing your employees and volunteers for other duties. To help your congregation with this task, Shelby Systems designed Check-In with a simplistic and intuitive interface that most anyone can use.

Most importantly, Check-In provides you with tremendous configuration flexibility, so that you can customize Check-In to fit the exact needs of your organization. Specifically, your organization can use the Check-In system to:

- **Track the locations of attendees**
In seconds, Check-In can show you who has checked in to what room.
- **Provide nursery security for the children in your organization**
Check-In receipting can increase the safety and security of the children entrusted to your care. You can create customized receipts for each class within your organization, if desired. Receipts may contain important information about the child like allergies or special instructions. You may also choose to include the parents' information, such as the class they attend or their general seating area in the worship service. Nursery staff may print receipts on labels and affix them to the child's clothing or diaper bag. Since Check-In uses the GlobaFILE database, you can retrieve member photographs to help you identify children, parents, and guardians.
- **Manage classroom capacities**
Check-In helps you keep track of how many individuals are in each room. When a room is full, Check-In can redirect the next attendee to a different room. You can use this feature to distribute individuals equally among classrooms or teachers, or you may fill a classroom to complete capacity before directing attendees to the next classroom.
- **Track "hospitality pager" numbers**
Hospitality pagers are becoming more and more widely used in restaurants, hotels and even churches. These pagers help alert people when their dinner tables are ready, when their taxicab has arrived at the hotel, or when a parent needs to report to the nursery to see about his or her child. The Check-In attendant enters the pager number into the system upon check-in and retrieves the number later should he or she need to page the parent.
- **Record attendance**
Check-In automatically transfers attendance information to the Attendance module

If your organizational structure has multiple levels and your Check-In kiosks use bar code readers, and if the kiosks are not using a touch screen monitor, then each kiosk will need an input device (such as a mouse or trackball) for selecting classes. Keep this in mind when planning the design of your kiosks.

Also, if you are using a single ID card to check in an entire family, you will need an input device to select which family members are present.

How are Individuals Checked In?

Check-In incorporates two methods, or modes, to check in attendees: *manned* and *unmanned* mode. If you use manned mode, Check-In requires a Shelby Systems operator (an employee or volunteer) to enter attendees into the system. However, with additional hardware such as a bar code reader or touch screen monitor, you can use unmanned mode and allow your attendees to check in themselves.

How Would Attendees Check Themselves In?

Unmanned check-in stations should include a touch screen monitor, a bar code reader, a fingerprint reader or perhaps a combination.

We designed the touch screen interface to be easy to use, leaving little room for error. Attendees can check in using the last four digits of their phone number, their name, or their Name ID (or GlobaFILE number).

Alternatively, you can issue ID cards to your attendees and use a bar code reader at each check-in station. To check in, attendees simply pass their ID cards under the laser.

A fingerprint scanner is the easiest for attendees to use. They do not have to look up anything or remember to bring a card. They always have what they need to check in.

Your organization will probably adopt a combination of check-in approaches. For best results, you may want to employ bar code readers to check attendees in quickly, touch screen monitors for attendees who forgot their ID cards, and a few manned stations staffed by attendants to assist attendees and to hand out hospitality pagers.

How Long Does it Take to Check Someone In?

The length of time it takes to check someone in depends upon the equipment you are using. You can check in approximately 6-12 individuals per minute per kiosk using the manned operation. You can check in attendees even faster using the other methods. The table on the next page provides the strengths and weaknesses of each check-In method.

MODE	Manned Operation	Touch Screen Operation	ID Card/Bar code/Fingerprint Reader Operation
<p>Ease of Use for Attendees</p>	<p>This operation is the easiest solution for your attendees; they simply give their name to the attendant.</p>	<p>Although very easy to use (attendees look up their names in a directory), this is the least simple method for checking in.</p>	<p>This method is easier to use than the touch screen. Unless you are using the fingerprint reader, however, each attendee must keep up with his or her ID card.</p>
<p>Check-In Speed</p>	<p>Not including visitors, an attendant can check in 6-12 attendees per minute. If you check in by families, you can average 8-16 attendees per minute. If you allow attendees to pick a group, check-in time will be slower.</p>	<p>Not including visitors (visitors cannot check in using this method), an attendant can check in 6-12 attendees per minute. If you check in by families, you can average 8-16 attendees per minute. If you allow attendees to pick a group, check-in time will be slower.</p>	<p>Using individual ID cards or fingerprints and the simplest check-in mode options, this method is nearly instantaneous (15-30 attendees per minute). If you check in by family or allow attendees to pick one group from several options, check-in time will be slower, but still rapid.</p>
<p>Cost</p>	<p>In terms of equipment cost, this method is the cheapest. You only need to purchase software†. However, you do have to pay labor costs to staff the station.</p>	<p>This method is the second cheapest solution. You will need to purchase one or more touch screen monitors in addition to the software†.</p>	<p>This is the most expensive solution. In addition to the software, the bar code solution requires at least one bar code reader and an ID card maker†. You will need to purchase blank ID card stock periodically to make new or replacement cards. If you want to include photos on receipts or ID cards, you will also need to purchase a webcam or digital camera. The fingerprint reader solution requires the fingerprint reader and software, but no additional materials.</p>
<p>Manpower</p>	<p>You will need an attendant to staff each kiosk.</p>	<p>Although the touch screen stations may be unstaffed, you will need someone to supervise multiple kiosks to enter visitors.</p>	<p>You will need someone to supervise multiple kiosks to enter visitors and members who forgot their ID cards (if you are not also using a touch screen monitor or fingerprint scanner).</p>
<p>Other Advantages</p> <p>†All modes require a computer at the kiosk. The computer can be hidden from view under a podium.</p>	<p>Using this method will better insure that you get all the information for new visitors; it is easier to walk past a machine than past a person. This is also the most accessible option for the disabled, as they will not have to interact with machinery.</p>	<p>Visually, this method is the most presentable. You can design your kiosk so that only the touch screen monitor is visible to attendees, giving the kiosk a cleaner look. In addition, the touch screen interface is customizable. You can change the color of the controls and even display a picture on the background, such as a photograph of your church. The touch screen operation gives first-time visitors a ‘hip and high-tech’ impression of your organization.</p>	<p>This method requires the least amount of technical knowledge and interaction on behalf of your members, making it the best solution for individuals uncomfortable with technology. The fingerprint scanner gives first-time visitors a ‘hip and high-tech’ impression of your organization. You can also utilize this method to help insure nursery security, since fingerprints cannot be duplicated. Since the major advantage of this method is speed, you would want to give this method even more consideration if you are also <i>checking out</i> attendees.</p>

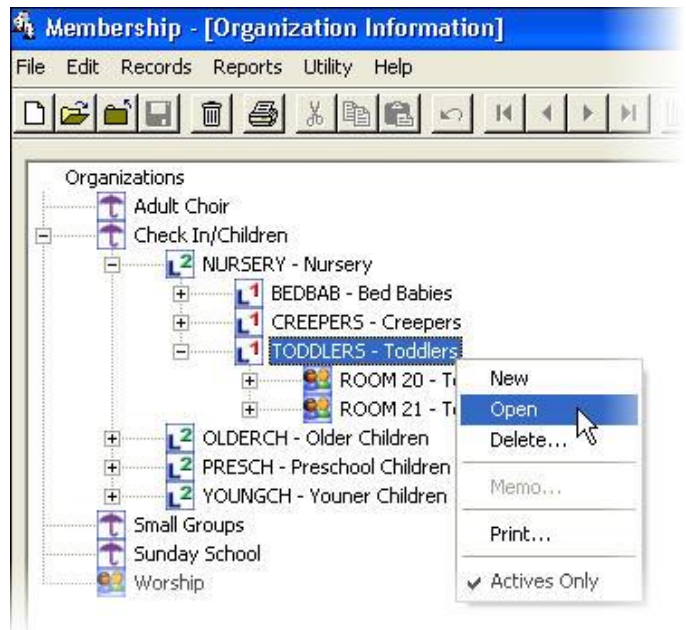
Set Up Check-In

Reconfigure Departments and Groups

You can configure each Level 1 of your organization to accept only attendees of a certain age range or gender. Each Level 1 also has Room Ratio settings that can help you manage classroom capacities. The purpose of gender and age restrictions is to ensure that Check-In redirects attendees to the correct overflow group in the case that their enrolled group is full.

Set Up Age and Gender Parameters

Open the Membership module and click the **Organizations** link. Expand the organization, right-click on the desired Level 1, and then click **Open** from the context menu. These parameters will apply to all groups within the level.



Grade Information

Organization: Check In/Children

Reports To: Nursery

Grade ID: TODDLERS

Active?

Description: Toddlers

Leader: [...]

Parent: [...]

Age: 2 by date (M/D) 7/1 to age 3 before date (M/D) 6/30

Gender: Both (dropdown menu open showing Both, Male, Female)

Attendees per Leader: 0 # of Attendees per Leader

Enter the appropriate age range for the level, and if desired, specify the gender.

In the example at the right, you will notice that attendees must be 2 years old. Since this level is co-educational, we will leave **Gender** set to **Both**.

How Room Ratio Settings Work

Essentially, Room Ratios prevent rooms from having too many participants. This is particularly useful if your organization has multiple classrooms or multiple leaders for the same group. You can set Room Ratios based on classroom capacity or leader capacity. For example, you can designate a classroom capacity of ten individuals, or you can make sure that no leader (teacher, counselor, aide, etc.) is responsible for more than five individuals at one time. You can use Room Ratios to regulate capacity in one of two ways:

Grade Information

Organization: Check In/Children

Reports To: Nursery

Grade ID: TODDLERS

Active?

Description: Toddlers

Leader: [...]

Parent: [...]

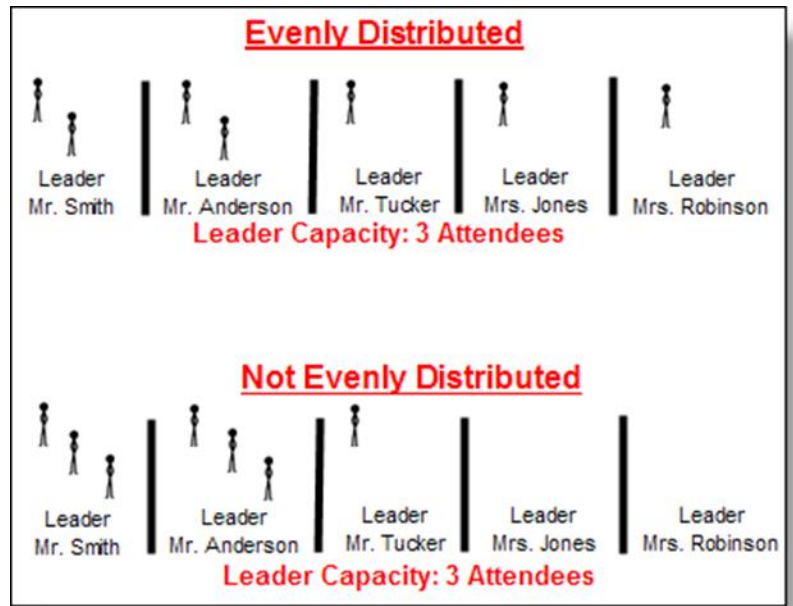
Age: 2 by date (M/D) 7/1 to age 3 before date (M/D) 6/30

Gender: Both

Check-In Options

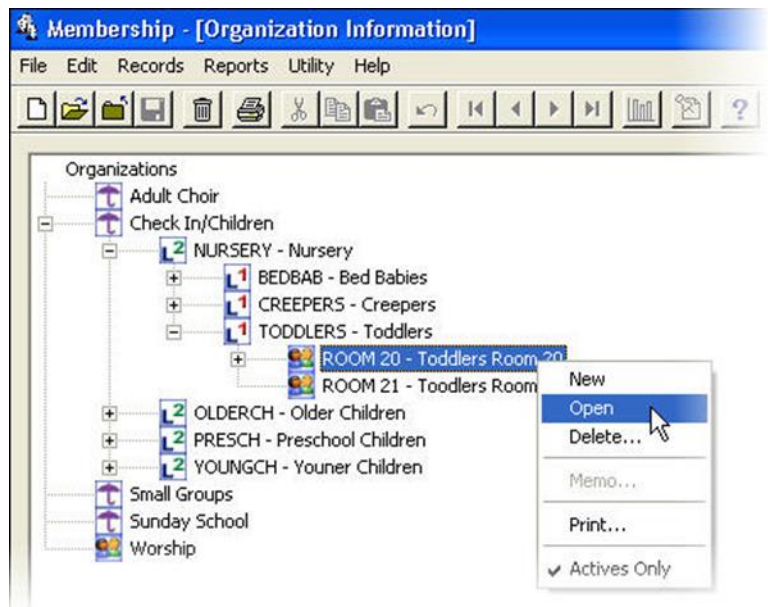
- Use Room Ratios?
 - Attendees per Leader
 - 3 # of Attendees per Leader
 - Attendees per Room
- Evenly Distribute Attendees?
- Use Pagers?
- Level Starts as Closed?

- You can evenly distribute attendees so that each classroom or leader has the same number of individuals, or
- You can fill one classroom or leader to capacity before the system starts assigning attendees to the next classroom or leader.



Set Up Individual Group Maximum Capacities

You can set a capacity limit on each individual group. This is group (or class) based instead of level based. To do this, right-click on the group in the Organization Information screen and choose **Open** from the context menu.



The screenshot shows the 'Room Information' form. At the top, the Organization is 'Check In/Children' and Reports To is 'Toddlers'. The Room ID is 'ROOM 20' and the Description is 'Toddlers Room 20'. There are three tabs: '1. Details', '2. Small Group Info', and '3. Involvement'. The '1. Details' tab is active. Fields include 'Active?' (checked), 'Roll Heading', 'Room Nu' (20), 'Category', and 'Started'. A 'Check-In Settings' section contains 'Check-In Class Maximum' (6) and 'Group Starts as Closed?' (unchecked). A red arrow points to the 'Check-In Class Maximum' field.

Enter the maximum number of attendees you desire for this room in the **Check-In Class Maximum** box. If you set your Room Ratios to attendees per leader in the previous step, this may or may not be the same number depending on how many leaders you typically assign to each room. For example, if you set the number of attendees per leader to 3, and you typically assign two leaders per room, you would enter 6 here. Then, assuming both leaders have checked in, six children will be able to check in to this classroom before it is full

Group Room Numbers

While on this screen, enter the room number for the group. Check-In uses this number for the room printer assignment. See the *Room Printer Information* section for more information

This screenshot is identical to the one above, but the 'Room Nu' field, which contains the value '20', is circled in red to highlight it.

When a Group is Full



Manned Mode Prompt

All Toddlers Room(s) are full. Please see an attendant.

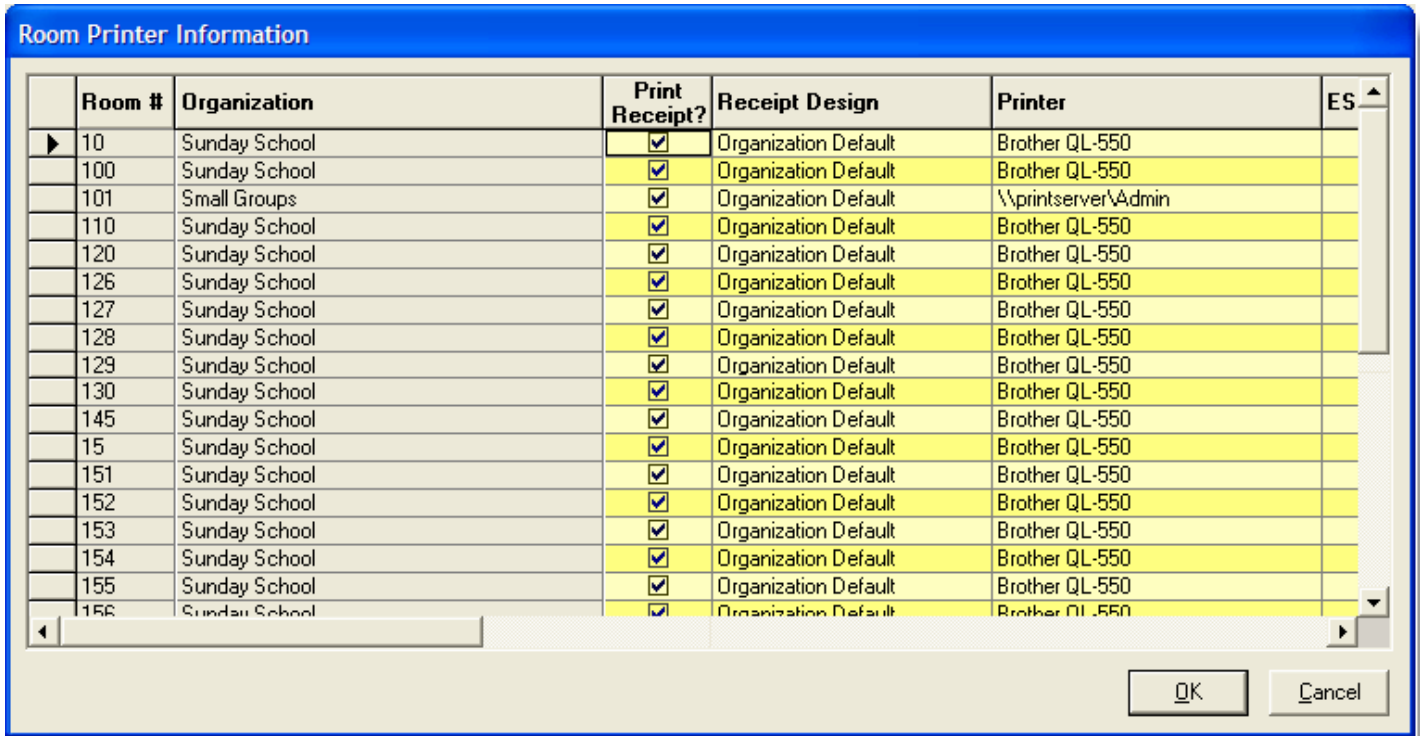
Unmanned Mode Prompt

If you are using Room Ratios, Check-In will first attempt to check attendees in to their *home group*, or the group the attendee has enrolled in. Membership lists the home group on the attendee's Organization screen. If the home group is full, Check-In will look for another group in the same level that is not full, and check the attendee in to that group instead. If all groups are full, Check-In displays one of the prompts displayed at left. In *manned* mode, the attendant can click **Yes** to proceed with check in. However, if the station is in *unmanned* mode, the attendee receives a notice that all rooms are full and that he or she must see an attendant

Room Printer Information

Room Printer Information provides several different receipt-printing options. Here you can specify the receipt design that will print for each room as well as which printer Check-In will use to print the receipt. You can set up one room to print two different receipt designs to two different printers while another room prints no receipt at all.

To access Room Printer Information, open the Check-In module, click **Utility** from the menu bar at the top of the screen, and then click **Room Printer Information**.



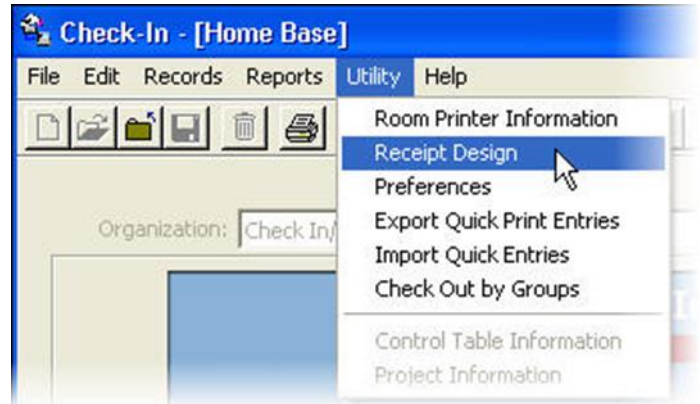
Notice that all room numbers displayed correspond to the room numbers you defined in Group Information setup in Membership. Locate the room you wish to set up and select the **Print Receipt** check box to indicate that you wish to print receipts for the class that meets there. Choose a receipt design or use the organization default established in Preferences. Type the printer address or select the appropriate printer from the drop-down list. If a **second** receipt is required, scroll to the right and enter the appropriate information. If a **check out** receipt is required, scroll further to the right and complete that information as well. Repeat these steps for each room, as needed.

Note: *If required, you can enter printer escape codes in this window. However, since printer escape codes are manufacturer specific, you will need to contact your printer manufacturer for assistance.*

Modify Receipt Design

To create and modify receipt designs, open the Check-In module, click **Utility** on the menu bar at the top of the screen, and then click **Receipt Design**.

Select a receipt design to modify using the drop down list at the top of the screen or add another format by clicking the **Add Format** button. To delete a format, select it from the drop down list and click the **Delete Format** button. Click the **Reset Default** button to reset all settings for this format back to the original Shelby Default format.



The Paper Tab

Form Height and Form Width

Enter the dimensions of the receipt.

Laser Form

Select this check box if you are not using a tractor feed printer.

Lines/inch

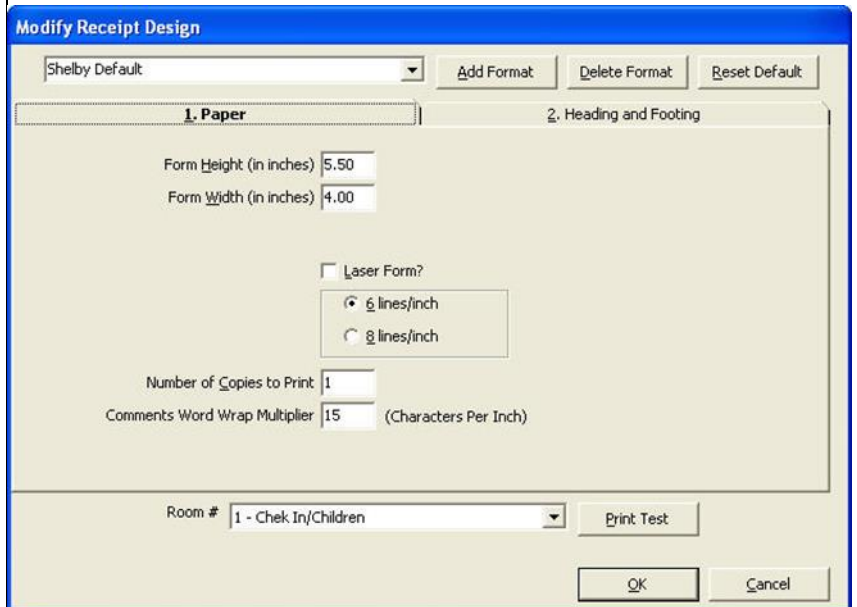
Select the appropriate option button to designate the number of lines per inch.

Number of Copies to Print

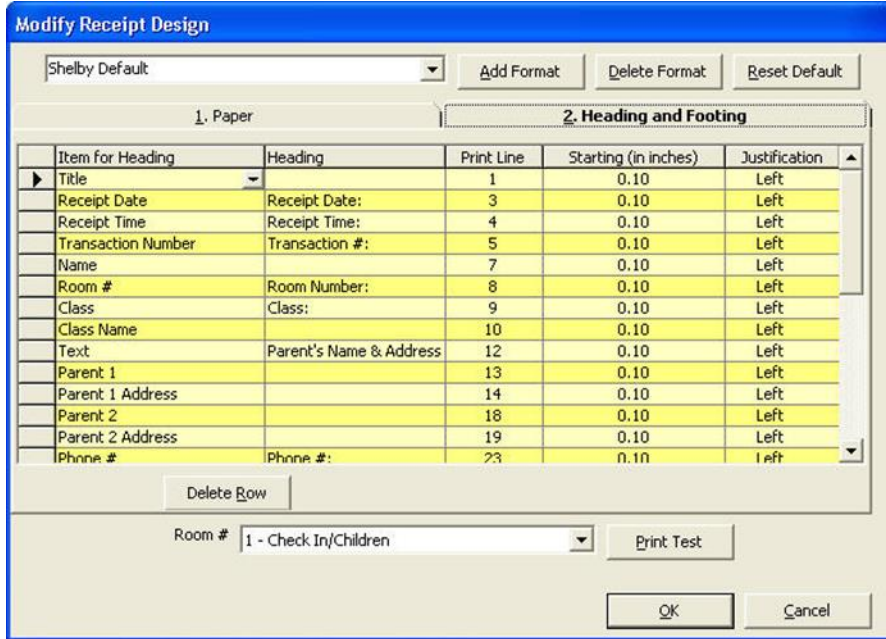
Indicate how many copies of each receipt you desire.

Comments Word Wrap Multiplier

This field controls the number of characters that print on a single line. Multiply this field by the total width of the form to see how many characters will fit on a receipt line before continuing on the next line.



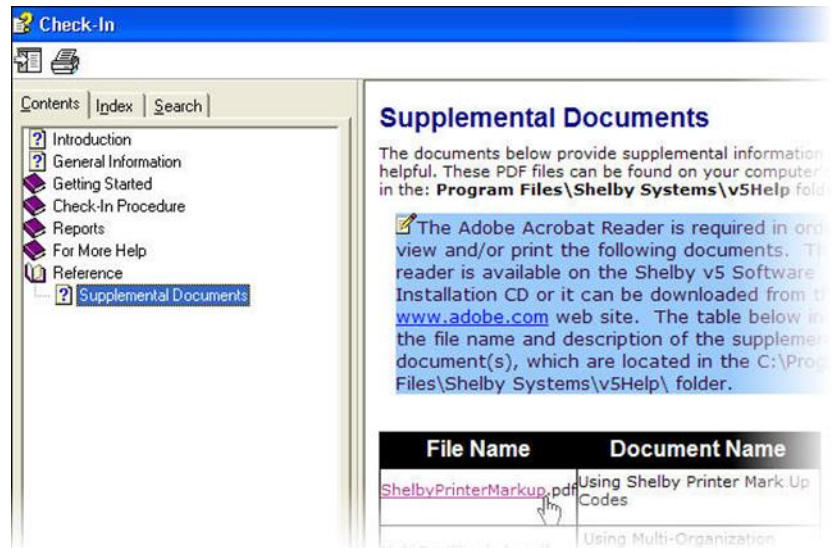
The Heading and Footing Tab



Use this screen to alter the appearance of the receipt. Select items that will appear on the receipt from the *Item for Heading* column. You can include introductory text before each item by typing the text in the *Heading* column.

Of particular use for a Check Out receipt are the two items **Guardian (Checking Out) Name** and **Guardian (Checking Out) Picture**. These items will print the name and picture of the guardian who checked out a child under the guardian's care, regardless of which guardian it is. These are only valid receipt design options when you are using **Guardian Security** mode.

You can also use Shelby Printer Mark Up Codes to choose a font type, font color, or other typeset effects. You can even designate a graphic to print on the receipt. For more information about using Shelby Printer Mark Up Codes, press the **F1** key on your keyboard to access the Shelby Systems Help files. On the Contents tab, double-click **References**, and then click **Supplemental Documents**. Click the link to download *Using Shelby Printer Mark Up Codes*.

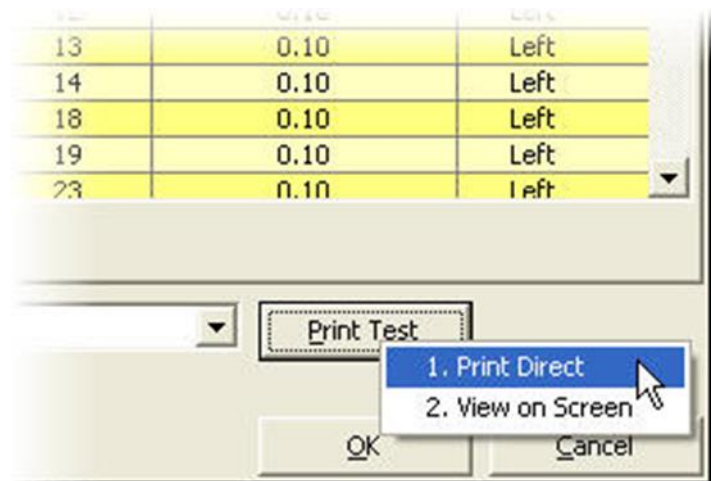


Enter line numbers in the *Print Line* column to indicate how far down the page you want each item to print (on a typical 8 ½ x 11 sheet, there are 66 lines). The *Starting* column determines how far from the left edge of the paper the item will print. Specify the alignment of the text along the margin in the *Justification* column. Typically, choose left justification for words and letters and right justification for numbers and figures

Check-In Quick Reference

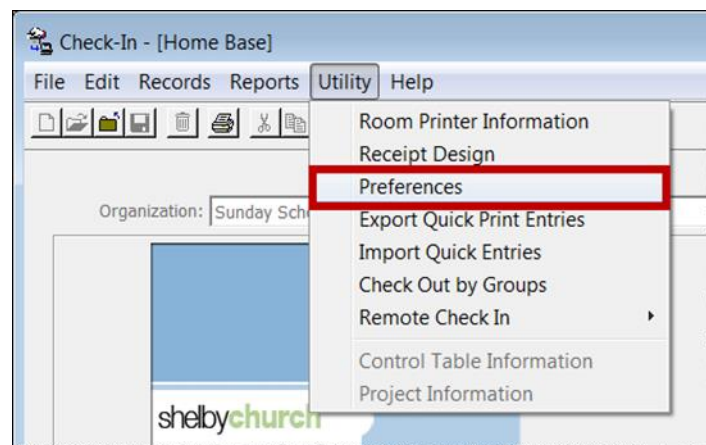
After making changes to the design, you can print a test receipt to view the results. You must have a receipt printer set up for the selected room and have at least one individual enrolled in the class in order to print a test receipt.

Clicking the **Print Test** button presents two options. You can choose to view the receipt as a print preview on the screen, or you can print a sample receipt. Select a room number from the **Room#** drop down list and the sample receipt will print to the printer that you assigned to the selected room number.



The Preferences Window

To set Check-In Preferences, open the Check-In module, click **Utility** on the menu bar at the top of the screen, and then click **Preferences**. There are two master tabs, each with two sub tabs. We will cover each option on the pages that follow.



The **Workstation Settings** tab (*Tab 1*) allows you to set up general preferences that are workstation-specific. This gives you the flexibility to tailor each check-in station to meet the needs of group who will use it. For example, you may wish to display a photograph of infants on the check-in station used by the nursery while using a photograph of the church for check-in stations used by attendees who check in to adult classes.

The **Module/Organization Default Settings** tab (*Tab 2*) allows you to establish module settings that are system-wide rather than workstation-specific. The settings established here will be the same at each check-in station.

Workstation Settings/General Settings

- Unmanned/Touch Screen Check In Sound File Location**
 Enter the path to a sound file (.wav) that will play each time an individual checks in. If this is blank, no sound will occur. This path can be to a shared network location or a local file.
- Unmanned/Touch Screen Background Picture Location**
 Polish the appearance of the touch screen interface by entering the path to a picture file (.jpg, .bmp, or .gif), such as a photograph of your church. The default background color is black and is not adjustable. However, you can create a picture file of a solid color using a program like Microsoft® Paint® and enter the path to it. **Tip:** For best results, design the background image to be the same size as the resolution used on the check-in station monitors.
- ID Card Design**
 Select which ID card design you wish to print in the Bar Code Assignment information area of an individual's detailed information.
- Printer**
 Designate the ID card printer in this field.

- **Unmanned Caption Color**

Control the color of text on the touch screen interface.



- **Assign Pagers after Check-In**

Check this box if individuals check in at one location but receive a pager at another. Assign pager numbers at any manned station by clicking the Pager Information button on the Check In Procedure screen. If this check box is unchecked, a prompt to capture a pager number will display immediately after an attendee checks into a group that uses pagers.

- **Use this computer for auto-polling**

Auto polling will automatically trigger Check In to update the active organization and the date of attendance based on the day and start time of your organizations. For details on enabling this feature, see the section of this document entitled **Update Unmanned Kiosks with Polling**.

- **Show pictures during check in.**

Select this check box to display individual or family pictures during check in.

- **Allow individuals to check in to multiple organizations at one time**

This optional feature provides a great benefit to your attendees by allowing them to check in to multiple organizations during one check-in session. For example, Mom could check in to Sunday school and Choir while checking Junior into Sunday school and Children’s Church without having to visit more than one check-in station.

- **Check Out by transaction number will check that individual out of all classes they are checked into.**

When this is not checked, entering the transaction number will open a prompt to verify which groups the individual is checking out of. When it is checked, no prompt will appear and the individual will be checked out of all groups.

- **All classes will default to Un Checked.**

When this is not checked, the group list appears with all groups checked. When this is checked, the group list has no groups checked at first.

- **Use BioPlugin fingerprint scanner?**

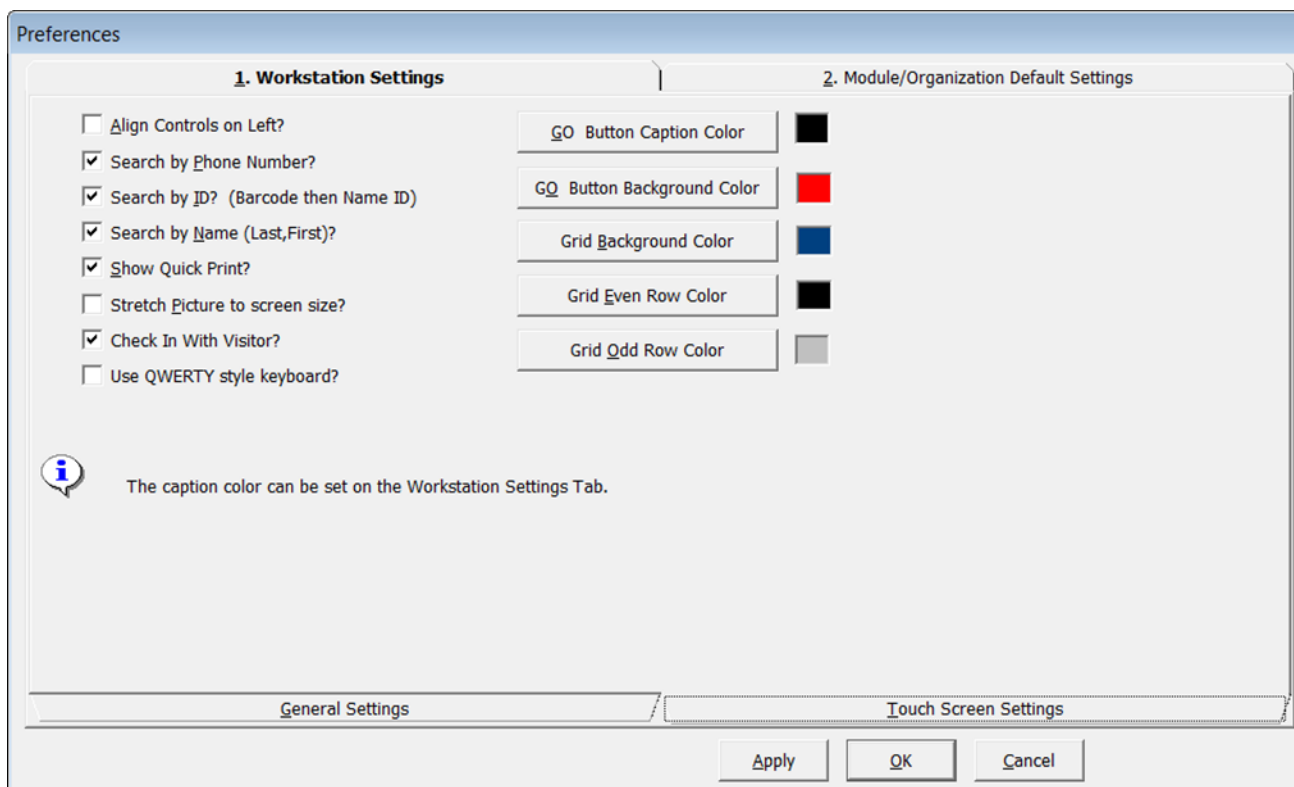
Check this box only when you have installed a fingerprint scanner. Visit <http://www.shelbyinc.com/fingerprintsanning>, contact a Shelby sales representative at (800) 877-0222, or e-mail mktg@shelbyinc.com for more details.



- **Remote Check In?**

This option places the entire Shelby v.5 system into a remote mode for check-in purposes only, allowing no data entry other than attendance taking. Do not check this box on any standard workstation in the home location. Use it only for a laptop or other system for remote check-in purposes. For more details, see the section of this document on **Remote Check In**.

Workstation Settings/Touch Screen Settings



- **Align Controls on Left**

Change the alignment of the touch screen buttons from justified on the right to justified on the left.



- **Search by Phone Number**

Select this check box to add an option button to the touch screen interface. Attendees may then check in using the last four digits of their phone number.

- **Search by ID (Barcode then Name ID)**

Select this check box to add an option button to the touch screen interface. Attendees may then check in using their Name ID (or GlobaFILE number).

- **Search by Name (Last, First)**

Select this check box to add an option button to the touch screen interface. Attendees may then check in using their name.

- **Show Quick Print**

Select this check box to add a **Quick Print** button to the touch screen interface. We will cover the Quick Print feature later in this guide. Use this option only if a keyboard is accessible to the person checking in.

- **Stretch Picture to screen size**

Select this check box to stretch your selected touch screen image to fit the screen. (Tip: For best results, design the background image to be the same size as the resolution used on the check-in stations).

- **Check In With Visitor**

Select this check box to add a **Checking in with Visitor** check box to the touch screen interface.

- **Use QWERTY style keyboard**

Select this check box to change the touch screen interface to a standard keyboard view.

- **GO Button Caption Color / GO Button Background Color**

Set the color of the text on the **Go** button and the color of the Go button itself.



- **Grid Background Color**

Set the background color of the grid submenu on the touch screen interface.

- **Grid Even Row Color / Grid Odd Row Color**

When Check-In presents a long list of non-specific records, the row colors will change for each family, alternating between the two colors that you choose here. These options control the color of the even and odd groups of rows, respectively.

Module/Organization Default Settings: Module Settings

- Seconds delay on unmanned capture**
 Type the number of seconds to display the check-in message before the next individual can check in.
- Reset Trans. #**
 Select this check box to reset the transaction number back to one. Check-In assigns transaction numbers upon check in. Transaction numbers will print on check-in receipts.
- Mode**
 Select **Individual** for each individual person to check himself or herself in. Select **By Family** to allow all members of a family to check in at the same time. Whenever any member of a family is selected, all members of the family will appear on the screen for check-in. You may also choose to **Include Other Relationships with Family** and select any one Other relationship from the drop-down box. **Using Guardian Security** is the last mode available. This mode allows anyone assigned as a guardian in the Bar Code Assignment information to check in himself or herself along with his or her “ward.”
- Bar Code Reader Only**
 Select this check box to make all options that require a keyboard or mouse input unavailable. Attendees will only be able to check in to their primary classes. This option is disabled when you are allowing check-in into multiple organizations at one time.
- One pager per family**
 Select this check box to assign one pager number to all the members of a single family who check in to a group that uses pagers.

- **Search by NameID When Bar Code not Found**

Check-In associates a number with every attendee. By default, this number is the Name ID (or GlobaFILE number). However, you may elect to assign bar codes to your attendees by clicking the Bar Code Assignment link on the Check-In Home Base screen. If you always want Check-In to associate attendees with their Name ID, you should select this check box.

- **Use Check-Out and Room Ratio Settings**

Select this check box to use the Check-Out and Room Ratio features. When you select this, you may also choose to **Check-Out in Manned Operation Only**. This prevents attendees from checking themselves out at unmanned stations. You may also choose to **Require Transaction Numbers when Checking Out**. This ensures that individuals who check out *must* enter the transaction number to proceed.

- **Show All Rooms in “Level 1 name”**

Select this check box to display all groups for the Level 1 associated with an attendee’s home group as listed on his or her Organization screen. This allows an attendee to check in to a group other than his or her home group.

- **Use Age Range and Gender for Quick Print**

Select this check box if you established Room Ratios in Level 1 of your organization and you want Quick Print to enforce those settings.

- **Allow Quick Print for Individuals not assigned to the Organization**

If you allow check in by family, you may encounter situations where only one family member is enrolled in an organization but attends with additional family members. For example, Mom has enrolled in Women’s Fellowship Group and her daughters decide to attend a meeting. Select this check box and Quick Print will launch after selecting the daughters’ names.

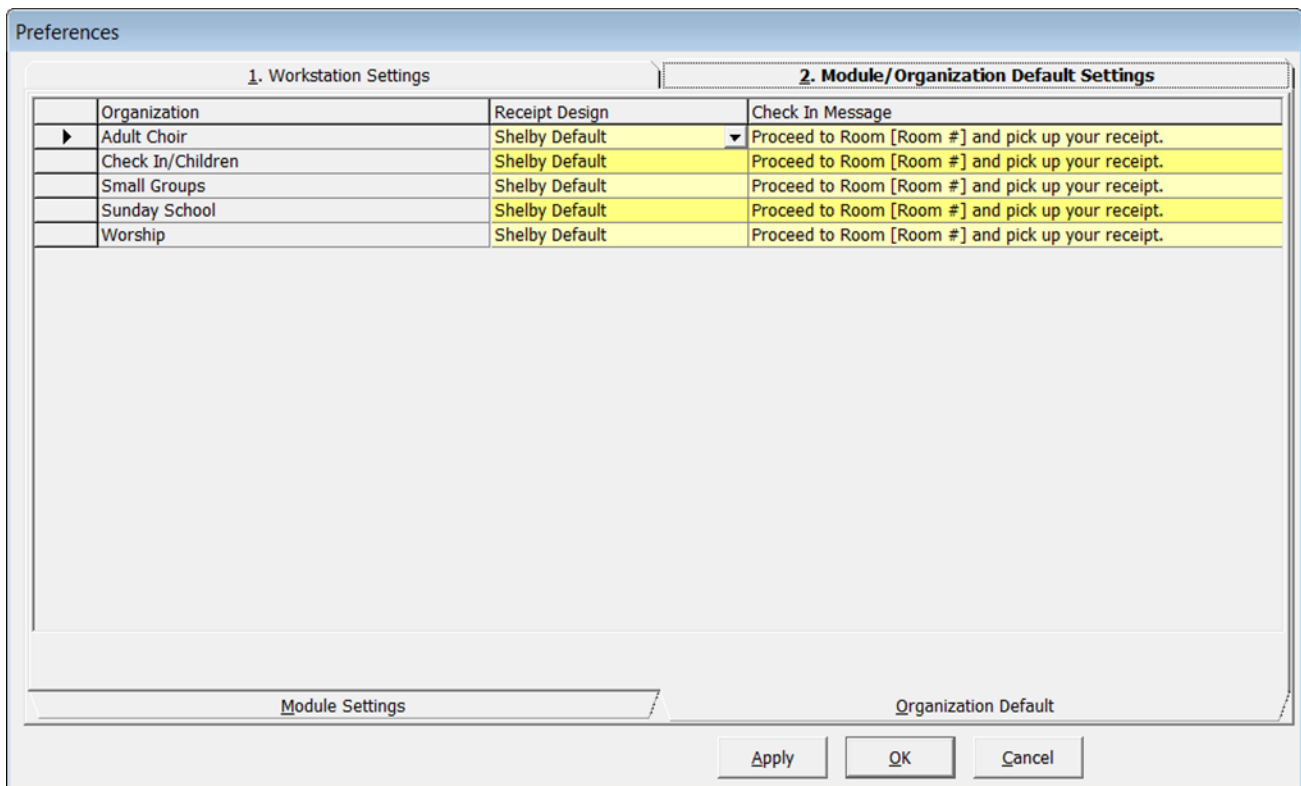
- **Print Transaction Receipt**

Select this check box to print a transaction receipt with a bar code and a transaction number. This receipt is useful if you also check out attendees and attendees must enter the transaction number to check out.

- **Include Cell information on Quick Print Screens**

This option enables you to capture cell phone number and provider information for visitors as well as members. This is particularly useful if you want to page parents by cell phone text message. To enable sending a text message to cell phones, click the **SMTP Settings** button and ensure the information is complete and accurate.

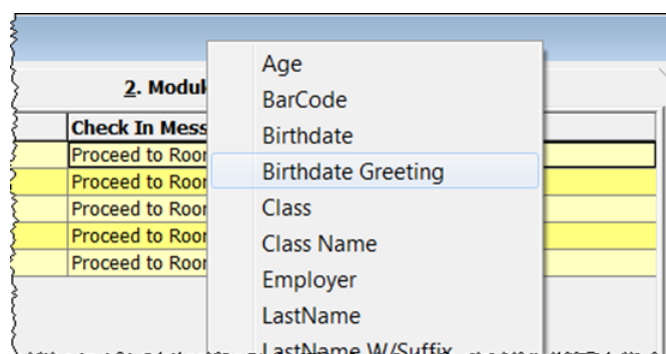
Module/Organization Default Settings: Organization Default



On this screen, you assign the default receipt design and the check-in message for each organization.

You can select a different default receipt design for each organization. **Room Printer Information** refers to the default receipt design as the “Organization Default.”

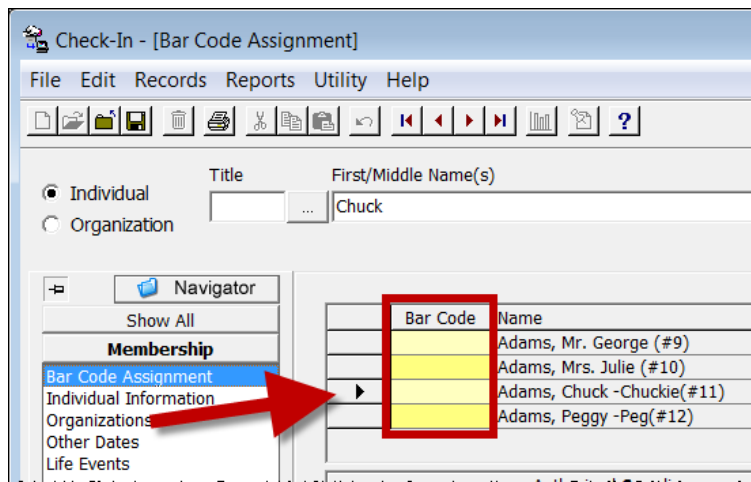
You can also create a custom check-in message for each organization. The check-in message displays each time an attendee checks in to that organization. To customize the check-in message per individual, you can insert merge fields. Merge fields can be used to direct attendees to the appropriate classrooms, display a personalized greeting, or even wish an attendee “Happy Birthday” using the *Birthdate Greeting* option. To add a merge field, place your cursor in the message where you want to insert the merge field, right-click and select the desired merge field from the list.



Bar Code Assignment Information

The **Bar Code Assignment** screen is actually a place to collect several different kinds of information used by the Check In module. It is available anywhere you can see Membership Information. The Check-In module provides a special Bar Code Assignment link that opens a name list filtered to the names in the “active” organization (i.e. the last organization used by the Check In Procedure). If multiple organizations are active, the name list contains only those people who are in the alphabetically first active organization.

As a convenience, when you open one family member’s Bar Code Assignment screen, you can update the information for all members of the family. To select the member of the family you wish to update, simply click on the name in the list near the top of the screen. In the illustration below, notice the triangle pointer on Chuck Adams’ row. This indicates that Chuck is the “active” person, and any changes to Bar Code Assignment items will apply to Chuck.



Bar Codes

To assign a bar code, click into the Bar Code box next to the name of the family member to whom you wish to assign the code. Then type the number in or use a bar code scanner attached to your system to scan a bar code, which will enter it as if you had typed it.

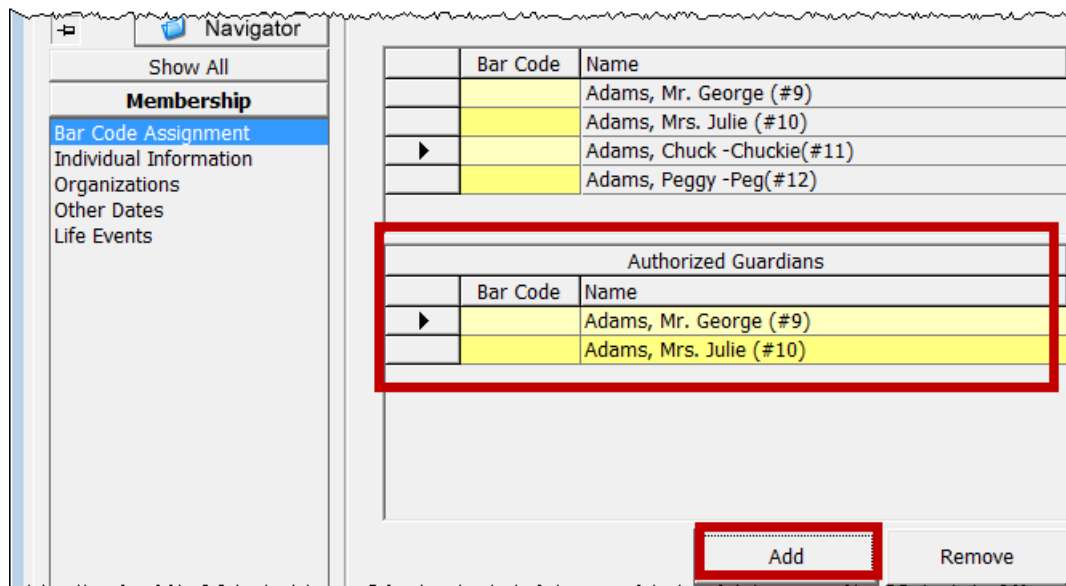
You can generate a sheet of bar codes for bar code assignment by returning to the Check-In Home Base screen, clicking **Reports**, and then clicking **Bar Code Labels**. Specify the number of bar codes you need and the label type and click **OK**.

If you enter no **Bar Code** value manually, Check In will use the Name Counter value as the bar code. Shelby v.5 assigns a unique Name Counter to every name entered into the system. It is sometimes called the “Shelby ID Number.” Although it is technically possible to use a mix of Name Counter values and manually assigned values, this is not recommended due to the difficulty in making sure the manual numbers do not conflict with the automatically assigned values. Unless you use only manual bar code values, you should set the Preferences utility to **Search by Name ID When Bar Code Not Found**.

Authorized Guardians

Authorized Guardians are allowed to check a child in and out of any group. They may be immediate family members, extended family members, and even non-relatives with permission from parent or legal guardian. Shelby v.5.10.1000 and later allows for up to ten authorized guardians for any child. It automatically assigns the Head of House and Spouse as guardians, and you can manually assign more, up to a total of ten. To add one or more new authorized guardians, click the **Add** button beneath the list of guardians. This opens an Include/Exclude list of names. Place checkmarks next to the names of the authorized guardians, using the Filter as needed to locate the guardians. Once the correct names are selected, click **OK**.

To remove an authorized guardian, click once on the name under the Authorized Guardians list and click **Remove**. The system will prompt you to confirm the choice, and then the name will be removed.



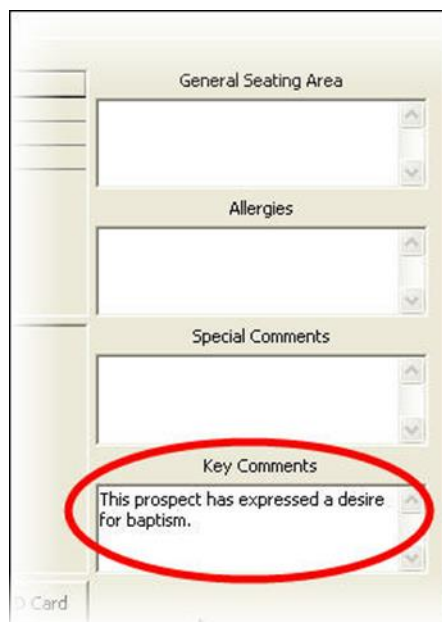
Set your Check In **Preferences** to the **Using Guardian Security** mode to use these authorized guardian assignments instead of individual or family check-in.

Print Bar Code ID Card

You can print a generic ID card from the Bar Code Assignment screen by clicking the **Print Bar Code ID Card** button. This sends the print job directly to the printer without a print preview step, so be sure you have the right printer selected as your default Windows printer before you click to print the card.

If you want a custom design, use the ID Card Design utility in GlobaFILE and print the card from the **Pictures** link under General Information.

Special Profile Comments



The screenshot shows a software interface with four vertically stacked text input fields. The fields are titled 'General Seating Area', 'Allergies', 'Special Comments', and 'Key Comments'. Each field has a small upward arrow on the left and a downward arrow on the right. The 'Key Comments' field is circled in red and contains the text: 'This prospect has expressed a desire for baptism.' At the bottom left of the interface, there is a 'Card' button.

On the Bar Code Assignment screen of the individual record, you will see four titled text boxes: *General Seating Area*, *Allergies*, *Special Comments*, and *Key Comments*. Text typed here will print on the attendant's copy of the check-in receipt, with the exception of text typed in the **Key Comments** box. This text becomes a key comment on the individual's GlobaFILE record. When your Shelby Systems users open the attendee's record in Membership or GlobaFILE, a key comment message will display until they click **OK**.

When you enter text into any of these four fields, Shelby Systems adds the corresponding preset profile to the individual's record, and the comments become profile comments. The four preset profile codes are ALLERG, KEY, SEAT, and SPECIA. You can view these profiles on the **Profiles** screen of the individual record.

The Check-In Procedures

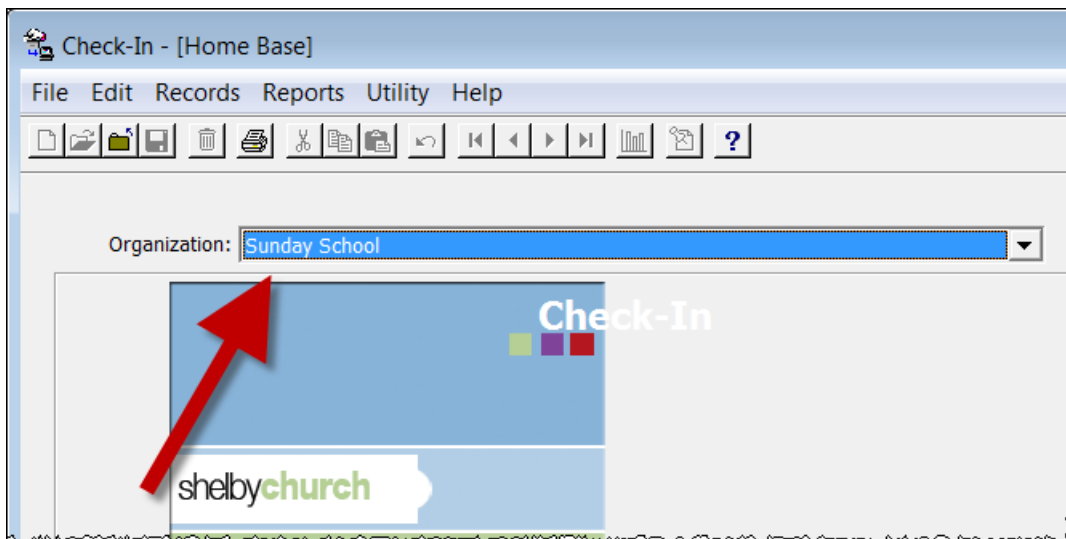
Whether you plan to use manned or unmanned mode, start the check-in process by opening the Check-In module and clicking the **Check In Procedure** link on the Home Base screen.

Remember, the Check-In module automatically transfers attendance information to the Attendance module when individuals check in. This eliminates the need to post attendance in the Attendance module later.

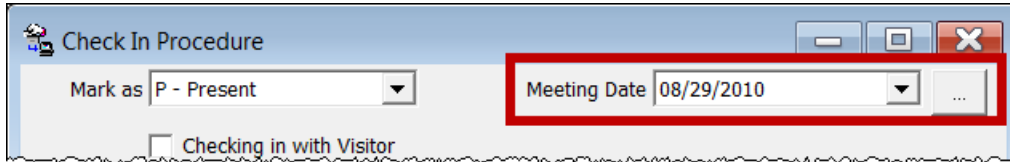
When you need to make changes in another module, such as Membership, close the Check-In module first. Make the changes and then reopen Check-In.

Single Organization Check In

Select the organization for check in from the drop-down at the top of the Check-In Home Base **before** you click the **Check In Procedure** link.



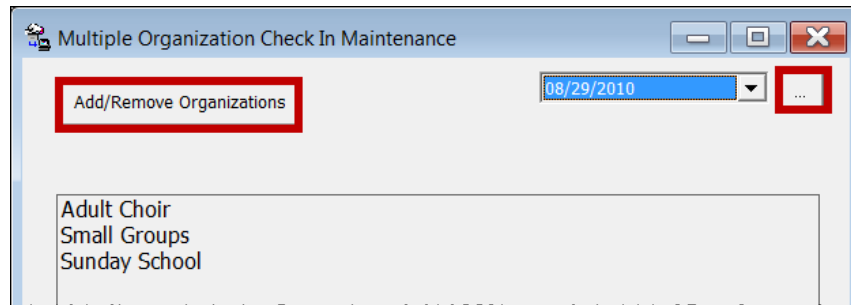
After you click **Check in Procedure**, select the date for check in from the drop-down box in the upper right corner of the window. If the date you desire is not in the drop-down box, click the **Search** button (...) to open a window where you can enter a new date. If you do not see the Search button, change the **Meeting Date** value to (New Date).



Multi-Organization Check In

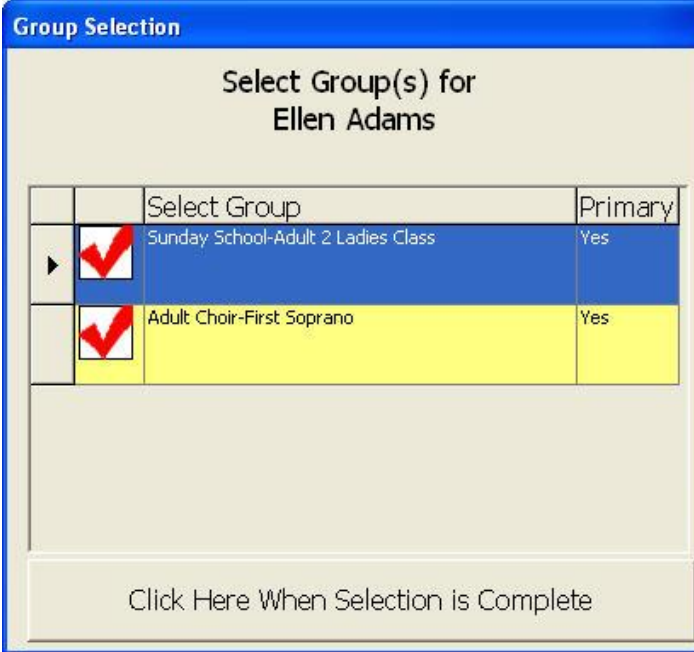
If the workstation preference has been set to **Allow individuals to check into multiple organizations at one time**, then your first step will be to select the organization(s) for check-in and to select the attendance date.

You will see a list of active organizations. Click the **Add/Remove Organizations** button to change which organization(s) are active. There will be a date in the drop-down box in the upper right corner. Choose the desired date from the drop-down box. If the date you desire is not listed, click the Search button (...) to open a calendar tool and select the new date.



Check-In Quick Reference

From this point you can follow the same procedure as for the single organization check-in and multi-organization. For attendees who are enrolled in more than one organization, they will be prompted to choose one or more organizations to check into, as shown below:



	Select Group	Primary
<input checked="" type="checkbox"/>	Sunday School-Adult 2 Ladies Class	Yes
<input checked="" type="checkbox"/>	Adult Choir-First Soprano	Yes

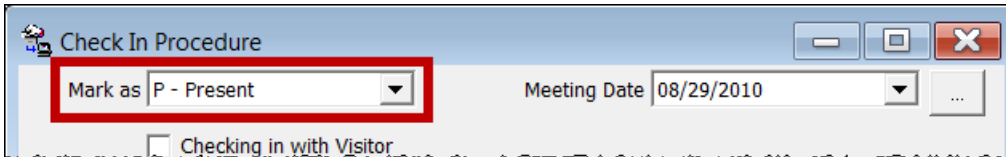
Click Here When Selection is Complete

If you also allow check-in by family, you will see the Group Selection window for each family member who has enrolled in multiple organizations.

Some options, such as polling, are not available after you enable multi-organization check-in. Therefore, you will need to assess the needs of your organization to determine which check-in method(s) will work best for you.

Select the Attendance Type for the 'Mark as' Field

On the Check In Procedure screen, make a selection for the **Mark as** field. This determines which attendance type (such as P-Present, etc.) to mark on the individual records when attendees check in. Use an attendance type other than "A-Absent."



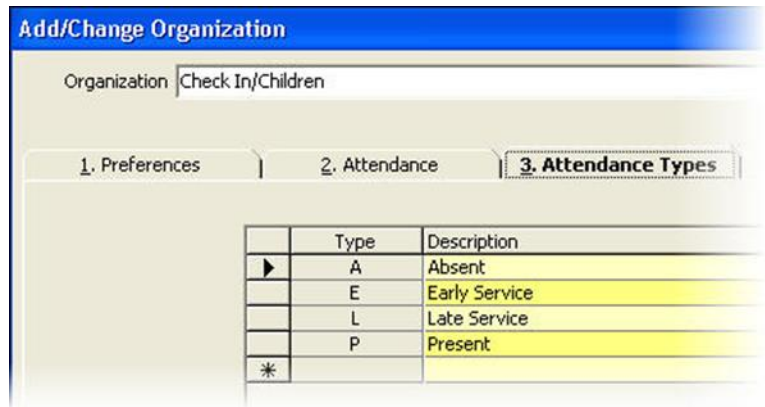
Check In Procedure

Mark as **P - Present**

Meeting Date 08/29/2010

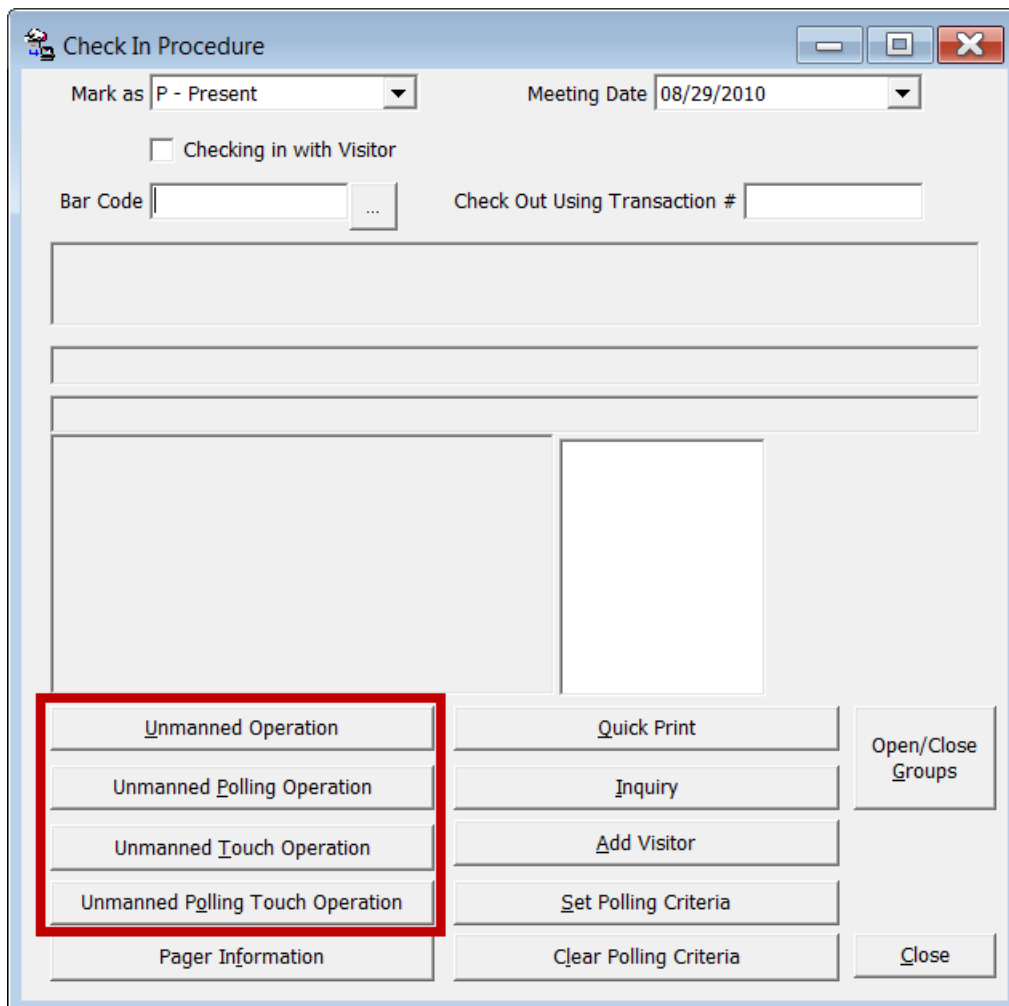
Checking in with Visitor

To create additional attendance types for an organization, open the Membership module and click on the **Organizations** link on the Home Base screen. Right-click on the organization and click **Open** from the context menu. Click on the **Attendance Types** tab and enter the information for the new attendance type in the next blank line.



Select a Mode of Operation

After you select the **Mark as** type, you will need to choose the mode used to check in attendees. The default mode is Manned Operation. At the bottom of the window there are buttons for selecting a different mode instead.



In addition to manned mode (which is the default mode), there are two unmanned modes: basic **Unmanned Operation** and **Unmanned Touch Operation**. Each of these may have polling enabled as well. Polling is explained in a later section of this document.

Use **Unmanned Operation** when you have a bar code reader or fingerprint reader attached to the workstation and want people to be able to check in without assistance of an attendant.

Use **Unmanned Touch Operation** when you have a touch-screen monitor attached to the workstation and want people to be able to check in without assistance of an attendant.

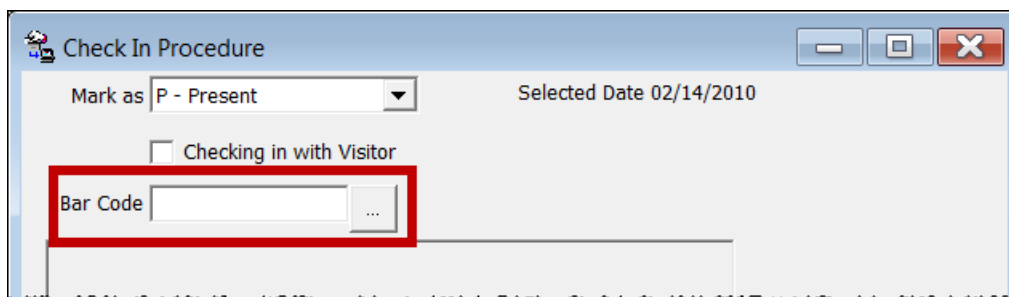
Checking In and Out Using Manned Mode

The most basic check-in mode, in terms of ease of use for your attendees and equipment cost, is manned mode. When you click the **Check In Procedure** link on the Check-In Home Base screen, you are in manned mode until you click another mode of operation. In manned mode, the station attendant has full control over who checks in. This provides security and allows you to gather complete information on visitors to your organization.

Entering a Bar Code

In manned mode, a station attendant checks in individuals. Using a scanner, the attendant simply scans the individual's bar code. The attendee may present his or her ID card, or the station attendant may scan the individual's bar code from a Shelby v.5 report that contains bar codes, such as an Attendance Roll.

If your organization does not use bar code readers, the station attendant may key into the Bar Code field the number that corresponds to the individual's bar code. Remember, if you do not assign bar codes, the station attendant can enter the attendee's Name ID (or GlobaFILE number). However, you must first select the **Search by NameID When Bar Code Not Found** check box in Preferences.



If you manually key bar codes, press the Tab key rather than the Enter key after typing. The bar code symbol for the Tab key is the Shelby Systems 'termination' character. The termination character lets the bar code reader know when to stop scanning digits on the bar code just like a period tells us that we have reached the end of a sentence.

Alternatively, the attendant may click the pick-button to the right of the Bar Code field and search for the attendee's name in the list presented. This process will take considerably longer than scanning a bar code or entering the Name ID. If you use manned mode to check in a large number of attendees each week, it would be useful to provide your attendees with an ID card or have them memorize their Name ID (or GlobaFILE number).

Checking Families In

When multiple family members check in to different groups, you can increase the speed of the check-in process by allowing attendees to check in by family. Then, when you check in one family member, the name of each family member enrolled in that organization displays. Select the family members who are present, and click the **Click Here** button at the top of the screen. You can activate check in by family in Preferences.

Family Check In	Click Here When Selections are Complete - 4 Selected
<input checked="" type="checkbox"/>	Adams, Mr. George
<input checked="" type="checkbox"/>	Adams, Mrs. Julie
<input checked="" type="checkbox"/>	Adams, Chuck -Chuckie
<input checked="" type="checkbox"/>	Adams, Peggy -Peg

Check-In Quick Reference

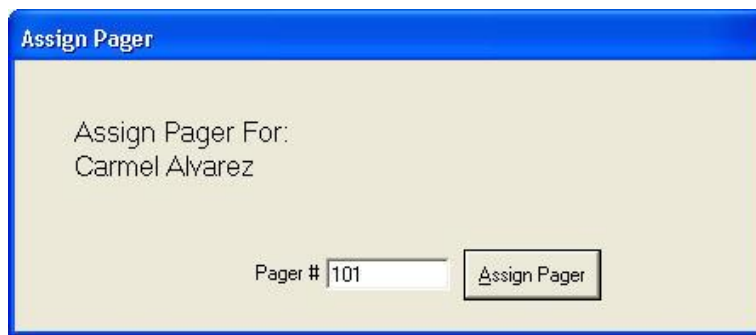
Because the user must click on the **Click Here** button to confirm the check-in choices, there must be a mouse available for manned and basic unmanned operation modes whenever you use family check-in. Unmanned touch operation does not require a mouse, since the touch screen will allow a touch-to-click.

Checking In with Visitor

If you put a checkmark in the **Checking In with Visitor** box before selecting the attendee, the Quick Print window will open after the attendee has checked in. This allows you to enter the visitor's information as part of the same process.

Assigning Pagers

If you configured the level to use pagers, Check-In will prompt you to enter the pager number for any attendee who checks in to a group in that level. However, if you checked the **Assign Pagers After Check In** check box in Preferences, use the **Pager Information** tool to assign them. The section on **Additional Check-In Functions** explains how to assign pagers using Pager Information.



Assign Pager

Assign Pager For:
Carmel Alvarez

Pager # 101

Pager numbers are not exclusive to one individual; you can assign the same pager number to multiple individuals.

Don't forget: The Use Pagers check box must be checked under the level's settings (under Organizations in the Membership module) to use this feature.

Description CHILDREN

Leader

Parent

Age by date (M/D) to age before date (M/D)

Gender Both

Check-In Options

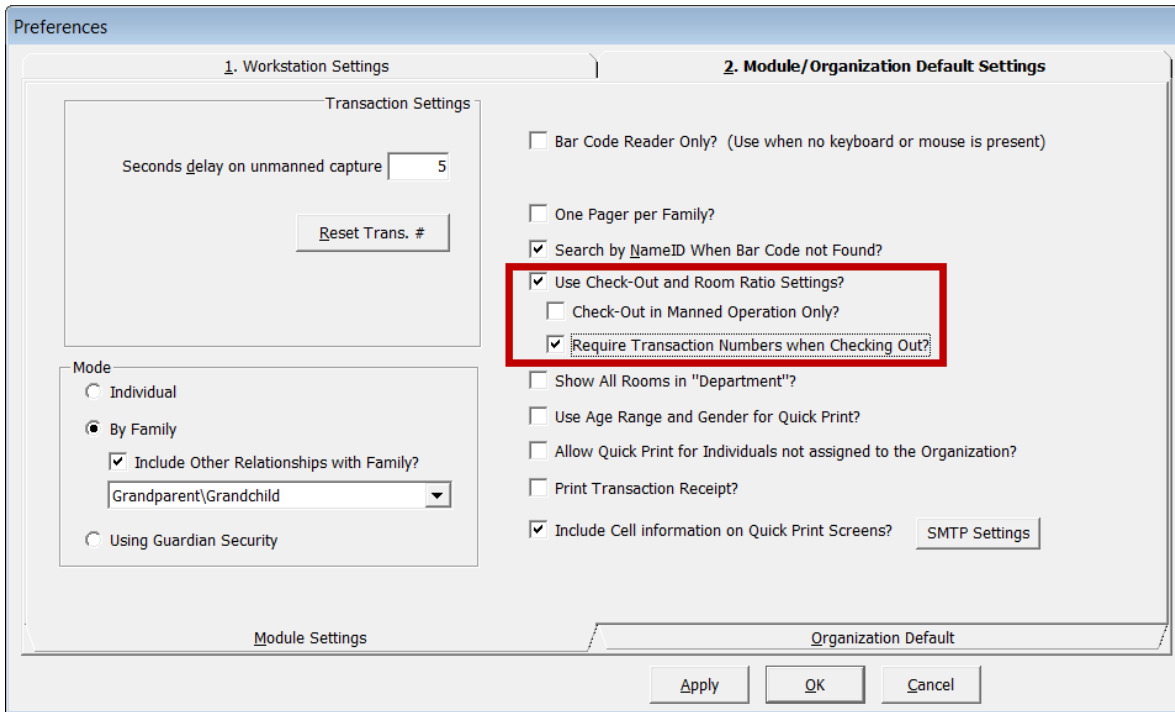
- Use Room Ratios?
- Attendees per Leader
 of Attendees per Leader
- Attendees per Room
- Evenly Distribute Attendees?
- Use Pagers?
- Level Starts as Closed?

Checking Out

Before an attendee may check "out," the option to **Use Check Out and Room Ratio Settings** must be active under Preferences. Using check-out is important if you are using Room Ratios. Once a group has reached its maximum capacity, some attendees will need to check out before other individuals can enter the group (in manned mode, you are allowed to put another individual into a group even if the group capacity has been reached).

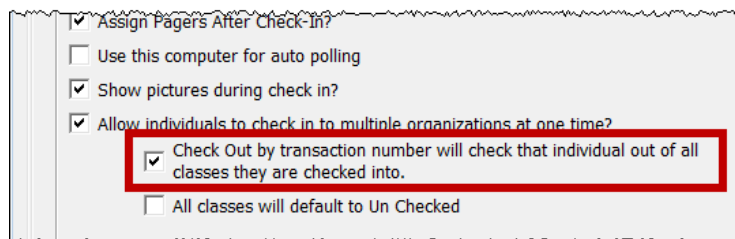
Check-In Quick Reference

You can enhance the check out security by requiring the transaction number at check out. You can activate this setting in Preferences. If you activate this choice, it is not possible for anyone to check out without the transaction number, so make sure it is printing on your receipts and emphasize to parents and guardians that they MUST keep track of the receipt.



Unless you require the transaction number to check out, to check an attendee out of an organization simply re-enter the attendee's bar code or Name ID in the Bar code field (just as you did when the attendee checked in). When you allow check in by family, the check out is also by family, opening a list of names, and each may be checked out individually.

Typically, when an attendee checks out from the multiorganization option, the attendee may choose which group(s) to check out of. However, there is an option in the Preference utility to check the individual out of all groups if he or she checks out using a transaction number.

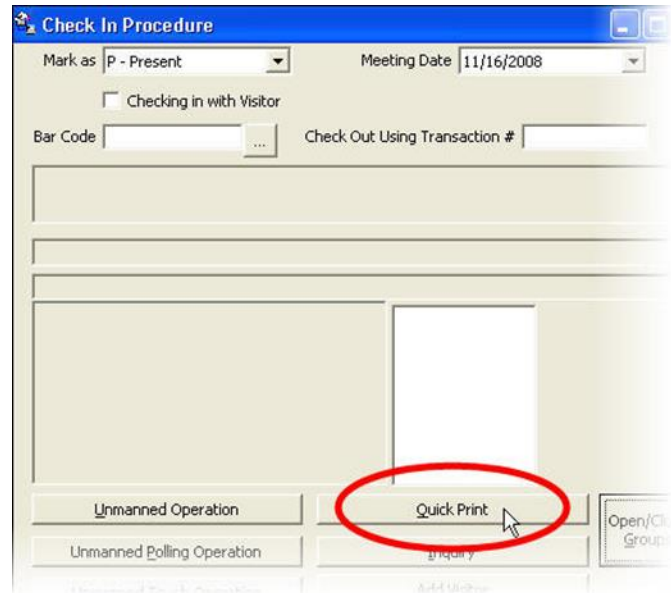


Using Quick Print

Quick Print is a utility that will allow you to save visitor information without having to leave the Check-In module. Later, you can import these visitor records into your Shelby Systems database and you can enroll the individuals in to the group they attended. Check-In writes this visitor information to a tab-delimited text file. You can open this file with Microsoft® Excel®, edit it, and import the file back into GlobaFILE. You can also import the Quick Print file directly into GlobaFILE without making any edits. We will cover the Quick Print import and export procedures later in this guide.

To access Quick Print, click the **Quick Print** button on the Check In Procedure screen.

Using Quick Print, you can enter information for an individual or for a family on one screen. Click the appropriate tab at the top of the Quick Print screen to indicate individual or family entry.



Individual Entry

Quick Print - Class

Individual Entry | Family Entry | Memo

First Name

Last Name

Address Line 1

Address Line 2

City State

Postal Code

Phone Number

Gender

Birthdate Pager Number

Email Address

Texting Information

Cell Cell Carrier

Show Class Info By:

- Level/Group, Name, Room #
- Name, Level/Group, Room #
- Room Number, Name, Level/Group

Group

OK Cancel

Enter the information for the visitor. Select the group from the **Group** list and click **OK** to check the visitor in to the selected group.

The visitor information does not have to be complete to check in. If you want to include only basic information, you may do so and amend additional details to the individual's GlobaFILE record after importing

To be able to send a text to the visitor, you must capture the **Cell** and **Cell Carrier** info.

Family Entry

The Quick Print family entry screen is similar to the GlobaFILE family entry screen. Complete the information for each family member present and specify a group for each to check him or her in to the appropriate groups.

Family Position	First/Middle Name	Last Name	Gender	Birthdate	Group	Pager
▶ HH			Unknown			
Spouse			Unknown			
Child			Unknown			
Child			Unknown			
Child			Unknown			
Child			Unknown			
Child			Unknown			
Child			Unknown			
*			Unknown			

Address Line 1

Address Line 2

City State

Postal Code

Main/Home Phone

Email Address

Texting Information

Cell Cell Carrier

OK Cancel

Notice that only groups within the organization selected on the Home Base screen display. If a family member needs to check in to a different organization, you will need to enter his or her information separately.

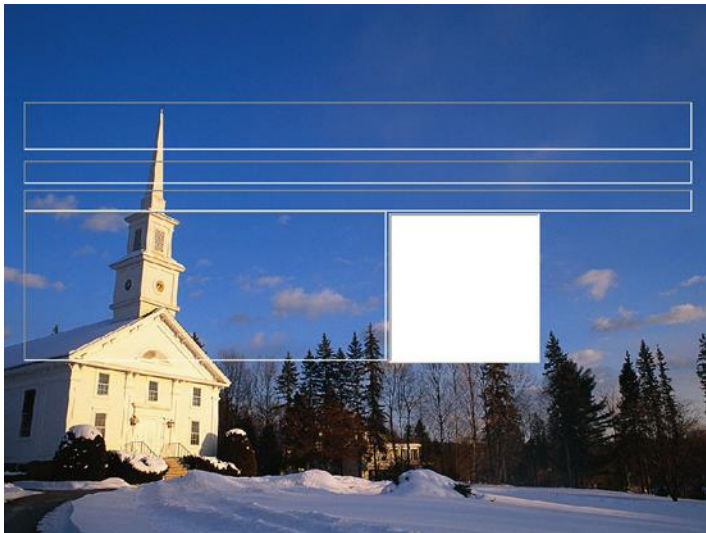
In addition, the **Texting Information** captures a Cell phone number and Cell Carrier. This information is associated only with the Head of House. If you want to assign a cell number for texting directly to a child, you must use the Individual Entry option.

Memo

This tab captures additional information you want to print on the Check In receipt along with the basic information. The receipt must have **Quick Print Memo** as part of the design in order for this to print.

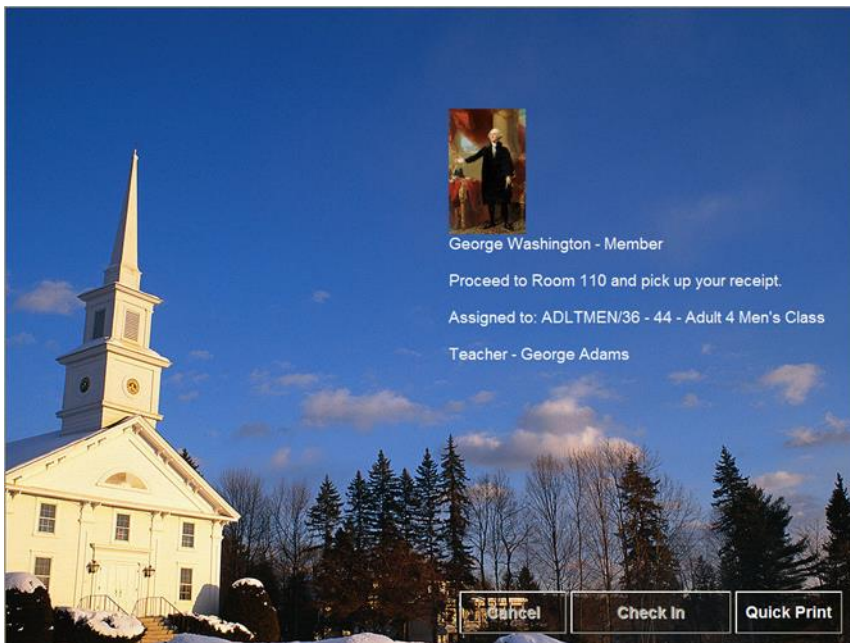
Checking In and Out in Unmanned Operation Mode

Use Unmanned Operation if attendees will scan the bar code on their ID cards to check in. The minimum requirements for this operation are a standard monitor and a bar code reader or fingerprint scanner. However, if you want to capture a pager number during the check-in process or if you enable Quick Print, you will need to provide a keyboard for typing. If you enable check in “by family” or multi-organization check-in, you will need a mouse or a touch screen monitor so attendees may “click” to confirm their choices.



To use this mode, click on the **Check In Procedure** link on the Check-In Home Base screen. Then click the **Unmanned Operation** button. The screen will look similar to the illustration at left; although, your background will be plain unless you specify a background image in the Preferences utility.

While on this screen, you can still type in a bar code number, press the tab key, and check an attendee in. You will not see any visual indication on the screen that you are entering in the number; however, the Check-In message will display.



Attendees can now check in by scanning the bar code on their ID cards or by using a fingerprint scanner. The screen then displays the check-in message and the attendees are on their way. Refer back to the Preferences section of this guide for instructions on changing these settings.

To check out, attendees scan the ID card or fingerprint again. For the family check-in option, the attendee must choose the family members to check out and “click” to confirm the choice.

Checking In and Out in Unmanned Touch Operation Mode

Unmanned touch operation allows attendees to check themselves in using a touch screen monitor. Attendees locate their own name, select members of their family who are present, and choose a group. Although designed to use a touch screen monitor, this mode supports the use of a mouse. To reveal the pointer and use a mouse, type a tilde on the keyboard; i.e., press



To enter unmanned touch operation, click the Check In Procedure link. Then, click the **Unmanned Touch Operation** button. The screen will look similar to the illustration below.

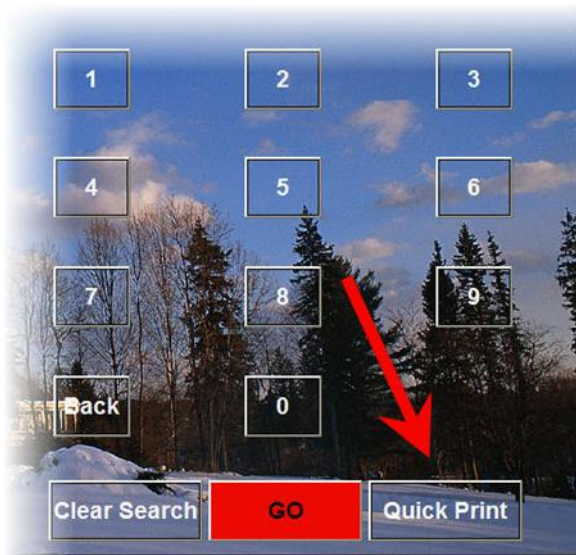


Depending on the search options enabled in Preferences, attendees can search using the last four digits of their phone numbers, by their names, or by their ID. If multiple search options are available, attendees must first select the search method they wish to use by selecting the appropriate option button.

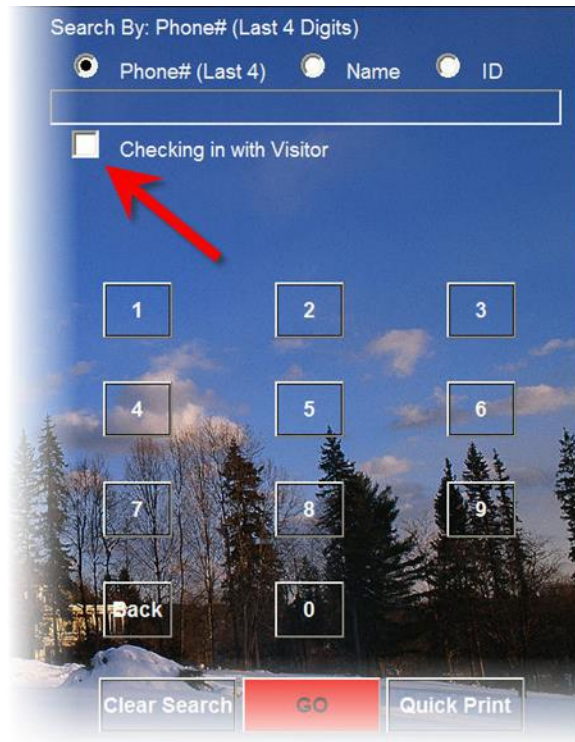
You can disable any of the search radio buttons from the Preferences screen to prevent attendees from checking in using that method.

Using Quick Print

You can launch the Quick Print screen without having to check in an attendee first using the **Quick Print** button at the bottom of the touch screen interface. The Quick Print screen requires a keyboard for data entry, so disable this option in Preferences for any kiosk that does not supply one



The Checking in with Visitor Check box



If attendees select **Checking in with Visitor** check box, the Quick Print screen will launch immediately after they check in.

It is generally preferred to direct visitors to a manned kiosk so that an attendant can obtain the necessary details from the visitor. You can disable this button in Preferences.

The Family and Group Selection Menus

The family and group selection menus are touch screen sensitive, so you do not need another input device to check or uncheck the selection boxes.

Assigning a Pager

If you are assigning the pager number during the check-in process, a prompt appears to enable the attendee to enter the number using the touch screen. The default setting is numeric only, but the Alpha option enables a full keyboard-style interface for letters and numbers both.

Other Check In Functions

Four additional functions are available in manned operation mode.

Pager Information

Use the **Pager Information** tool to look up and assign pager information.

If you elected to **Assign Pager Numbers After Check In**, this is the place to do it. Be certain to include the Transaction Number on the printed check-in receipt. You must have the transaction number to assign a pager.

The screenshot shows a software window titled "Pager Information". At the top, there is a "Search By:" section with two radio button options: "Pager Number" (which is selected) and "Transaction Number". Below this, there are two input fields labeled "Pager #" and a button labeled "Update Pager". At the bottom right of the window is an "OK" button. The main area of the window is currently empty, suggesting a search has not yet been performed or no results are displayed.

When you **Search By Pager Number**, you are able to see the name of the attendee who last checked in with that pager.

When you **Search By Transaction Number**, you are able to see the name of the attendee with that transaction number. You are also able to see any existing pager number and to assign a new pager number to that attendee. You must have the transaction number available to add or to alter Fa pager assignment.

Inquiry

The **Inquiry** window has two tabs: **Class** and **Individual**. The Class Inquiry allows you to monitor class capacities at a glance and to close or to open classes as needed. The Individual Inquiry allows you to check the status of any attendee and to send a text message, if all the cell information is available.

Class Inquiry

The **Class Inquiry** lists the active groups in the selected organization, along with check-in stats.

Check-In Class Inquiry

 Class | Individual

Filters
 Organization: Sunday School

Use Refresh Rate
 # Seconds

ID

Name

Room #

Room Max

Room Status

Leaders

People

Quick Print

Check-In Total

Available

All
 Closed
 Open

ID	Name	Room #	Room Max	# Leaders	# People	# Quick Print	Check-In Total	# Avail	Clc d?
▶ ADLTCOED/C & C	College & Career Class	10	0	0	1	0	1	-1	<input type="checkbox"/>
ADTLADY/25-29	Adult 2 Ladies Class	20	0	0	1	0	1	-1	<input type="checkbox"/>
ADTLADY/30 - 35	Adult 3 Ladies Class	44	0	0	0	0	0	0	<input type="checkbox"/>
ADTLADY/36 - 44	Adult 4 Ladies Class	126	0	0	1	1	2	-2	<input type="checkbox"/>
ADTLADY/45 - 54	Adult 5 Ladies Class	127	0	0	0	0	0	0	<input type="checkbox"/>
ADTLADY/55 - 64	Adult 6 Ladies	128	0	0	0	0	0	0	<input type="checkbox"/>
ADTLADY/65+	Adult 7 Ladies Class	129	0	0	0	0	0	0	<input type="checkbox"/>
ADTLADY/WIDOWS	Widow's Class		0	0	0	0	0	0	<input type="checkbox"/>
ADTMEN/25 - 29	Adult 2 Men's Class	30	0	0	0	0	0	0	<input type="checkbox"/>
ADTMEN/30 - 35	Adult 3 Men's Class	100	0	0	1	1	1	-1	<input type="checkbox"/>
ADTMEN/36 - 44	Adult 4 Men's Class	110	0	1	0	0	1	0	<input type="checkbox"/>
ADTMEN/45 - 54	Adult 5 Men's Class	120	0	0	0	0	0	0	<input type="checkbox"/>
ADTMEN/55 - 64	Adult 6 Men's Class	130	0	0	0	0	0	0	<input type="checkbox"/>

Monitor Changes in Near Real Time

If you want the list to automatically refresh itself every few seconds to provide near “real time” tracking, check the **Use Refresh Rate** box in the upper right. The default rate is every 10 second, although you may change that number and click **Set Refresh** to set a different rate. At any time you can click **Refresh** to get an instant update to the numbers.

Although the theoretical minimum refresh rate is one second, you may not see that kind of response. Several factors may prevent such a rapid refresh rate, such as the number of check-in kiosks running concurrently and the bandwidth of your network.

Filter the Group List

The rest of the upper half of the window is a set of filters. If you have a long list of groups, you may wish to use one or more of these filters to shorten the visible list. After changing the filter value, click **Refresh** to apply the filter and update the list.

The filters have an implied wildcard after whatever you type. Because of this, you only need to type the first few letters or numbers of a value to match all similar values.

Close or Open a Group

The column on the far right of the Class Inquiry is checkbox in yellow with a label of **Closed**. When this box is checked, no one may check into that group. Use this option if you need to close a nursery or child’s group and force later attendees to check into a different group. If conditions change and the group may re-open, remove the check box.

Print or Export to Excel

The **Print** button gives you the option of printing the inquiry grid or exporting it to Excel. If you choose to print, you will first choose the print settings. Select your options carefully, because there is no way to alter the print settings after the print preview appears. Among any other options you choose, you should set the orientation to landscape in order to fit the width of the grid onto one page.

If you choose to export to Excel, the software will send the contents of the inquiry grid to an Excel worksheet. Excel will open in print preview mode. Close the print preview mode to work with the data as a standard worksheet.

Individual Inquiry

The **Individual Inquiry** lists the names of those currently checked in. It opens up blank, waiting for you to provide a filter to locate just one or a few names, but you can also click the **Refresh** button without any filters to list all the names.

Check-In Class Inquiry

Class | **Individual**

Filters

First Name Last Name

Pager Transaction ID Barcode Number

Group ID

214 records found.

	Name	ID and Name	Birth Day	Age	Address 1	Phone
	Adams, Billy (#5)	YHJRHHG/7GR - 7th Grade Class	7/7/1960	50	6750 Poplar Ave	(901) 756-42
	Arnaz, Desi -Little Desi(#1071)	YHJRHHG/7GR - 7th Grade Class	3/20/1995	15	3064 Josibpet Ln	555-7751
▶	Adams, Jack (#4)	YHSRHGH/9GR - 9th Grade Class	3/16/1993	17	12 Cherry St.	(901) 520-56
	Alvarez, Mrs. Carlita (#36)	ADTLADY/25-29 - Adult 2 Ladies Class	5/10/1979	31	1220 Weiner Rd	555-9885
	Adams, Mr. Allen (#2)	ADLTMEN/25 - 29 - Adult 2 Men's Class	12/12/1978	31	12 Cherry St.	(901) 520-56
	Adams, Mr. Allen (#2)	ADLTMEN/25 - 29 - Adult 2 Men's Class	12/12/1978	31	12 Cherry St.	(901) 520-56
	West, Jim (#0)	ADLTMEN/30 - 35 - Adult 3 Men's Class				
	Adams, Mrs. Julie (#10)	ADTLADY/36 - 44 - Adult 4 Ladies Class	2/27/1971	39	6715 Watergrove Dr	555-5555
	West, Mae (#0)	ADTLADY/36 - 44 - Adult 4 Ladies Class				
	Adams, Mr. George (#9)	ADLTMEN/36 - 44 - Adult 4 Men's Class	2/27/1971	39	6715 Watergrove Dr	555-5555
	Arnaz, Mr. Desi (#1070)	ADLTMEN/45 - 54 - Adult 5 Men's Class	5/21/1963	47	3064 Josibpet Ln	555-7751
	Adams, Peggy -Peg(#12)	ADLTCOED/C & C - College & Career Class	2/27/1987	23	6715 Watergrove Dr	555-5555
	Alvarez, Carmel (#39)	NURSERY/CREEPERS/ROOM 14 - Creeper F	6/19/2007	3	1220 Weiner Rd	555-9885

Cell Phone: (901) 555-8765

Add or Change a Filter

Use the Filters at the top of the window to locate particular individuals. Each time you change a filter, you must click the Refresh button to apply the filter and update the list of names.

Inquiry Information

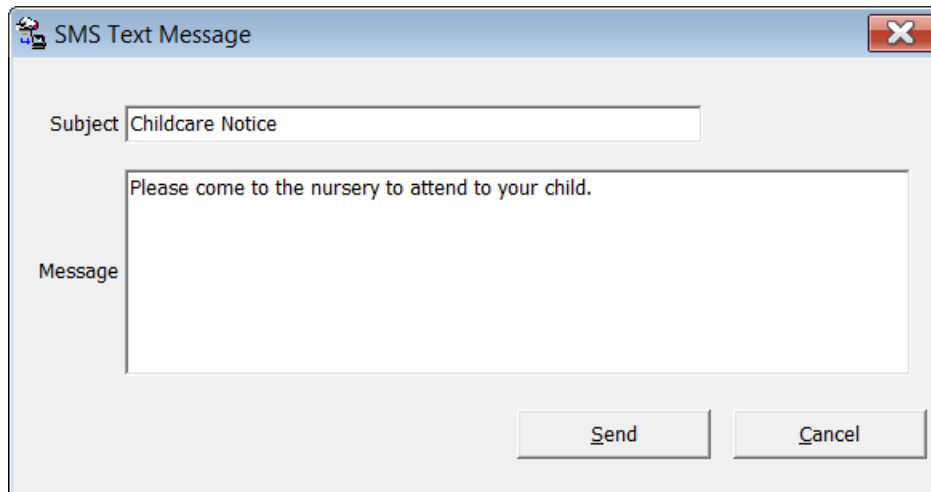
For each name on the list, you can see the following:

- attendee's name and Name Counter,
- group ID and full group Name,
- date of birth,
- age,
- Main/Home street address,
- Main/Home phone number,
- Quick Print entry (yes or no),
- the date and time of check in,
- the date and time of check out,
- the name of the person who checked the attendee in, and
- the name of the user who checked the attendee out.

Send a Text Message

Before text messaging is enabled for a given attendee, that attendee must have a Cell phone number and a Cell Provider defined on the General Information > Phones screen. For Quick Print attendees, both the cell phone and the provider must be entered on the Quick Print screen.

To send a text message to any attendee, click the attendee's name in the list to highlight it and then click the **Send Text Message** button below the name list. Enter the subject and message body into the pop-up window and click **Send**.



The image shows a screenshot of a software dialog box titled "SMS Text Message". The dialog box has a standard Windows-style title bar with a close button (X) in the top right corner. Inside the dialog, there is a "Subject" label followed by a text input field containing the text "Childcare Notice". Below the subject field is a larger text area labeled "Message" on the left side, containing the text "Please come to the nursery to attend to your child." At the bottom of the dialog box, there are two buttons: "Send" and "Cancel".

Print or Export to Excel

The **Print** button gives you the option of printing the inquiry grid or exporting it to Excel. If you choose to print, you will first choose the print settings. Select your options carefully, because there is no way to alter the print settings after the print preview appears. Among any other options you choose, you should set the orientation to landscape in order to fit the width of the grid onto one page.

If you choose to export to Excel, the software will send the contents of the inquiry grid to an Excel worksheet. Excel will open in print preview mode. Close the print preview mode to work with the data as a standard worksheet.

Reprint a Receipt

Right-click on any name on the inquiry screen to select **Reprint Receipt**.

Add Visitor

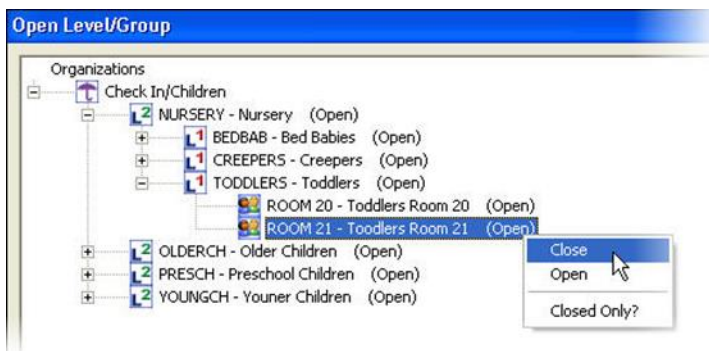
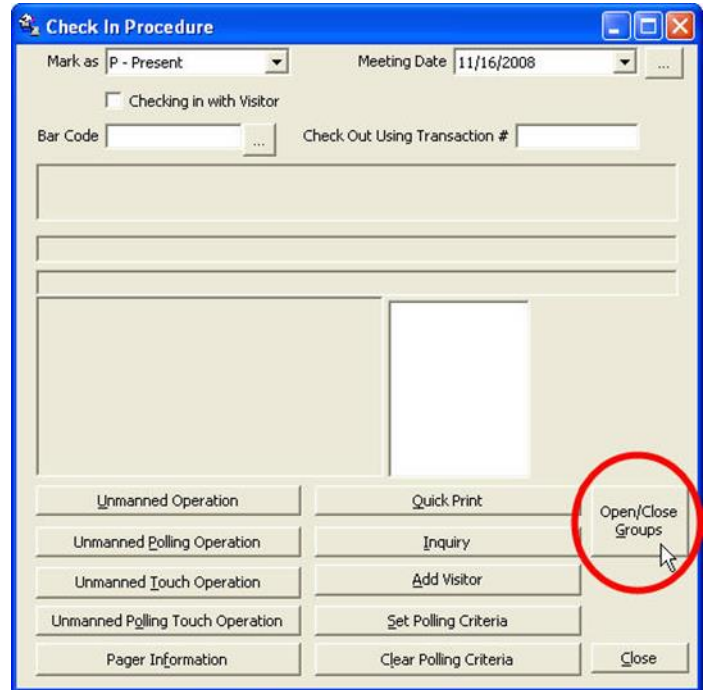
To add a record directly to the GlobaFILE database, click the **Add Visitor** button. This does not check in the individual. After adding the name, you can choose it in the lookup box to check the person in.

Opening and Closing Groups

The Open/Close Groups feature is useful if you need to prevent attendees from checking in to a group that does not plan to meet. Reasons why you may need to open or close groups could include:

- The group may cancel their meeting due to bad weather.
- The group will not meet this week due to the leader’s absence.
- You may create special overflow groups that are used only during a large influx of attendees (such as during Christmas or Easter).

To open or close a group, click the **Open/Close Groups** button on the Check In Procedure screen

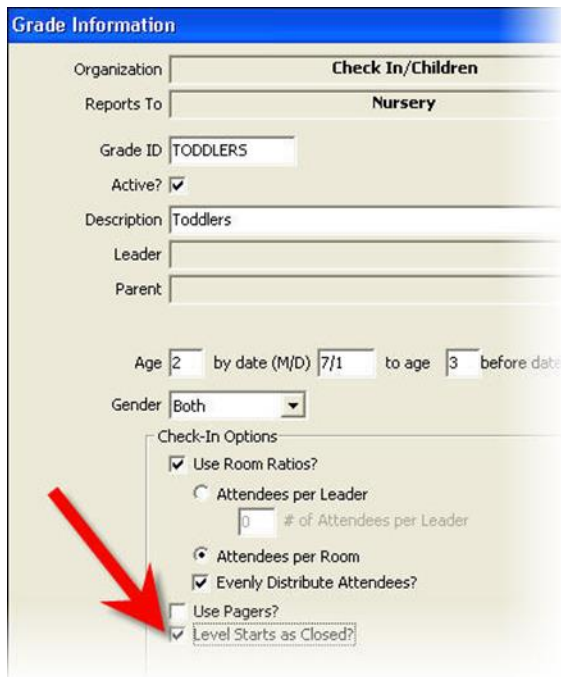


Next, click on the organization to expand the organizational structure. If nothing happens, right-click on the organization and click to uncheck the **Closed Only** option (by default, only closed groups display). Locate the group you want to open or close. Right-click on the group, and click either **Open** or **Close**. The open/closed status will display to the right of the group name.

You can also close an entire level, which will subsequently close all levels and groups that fall under it. If a level is closed, you will be unable to open the group until you open its parent level.

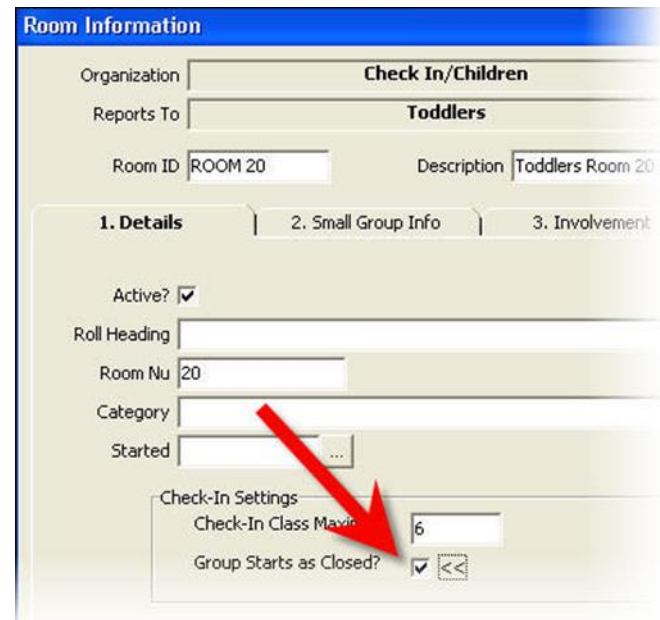
Check-In Quick Reference

If you want a group or level to start as Closed every new meeting, such as with special overflow groups for large attendance dates, open the group or level in Organization Information in Membership, and select the **Level Starts as Closed** or **Group Starts as Closed** check box.



Grade Information

Organization: Check In/Children
Reports To: Nursery
Grade ID: TODDLERS
Active?
Description: Toddlers
Leader:
Parent:
Age: 2 by date (M/D) 7/1 to age 3 before date
Gender: Both
Check-In Options:
 Use Room Ratios?
 Attendees per Leader
 0 # of Attendees per Leader
 Attendees per Room
 Evenly Distribute Attendees?
 Use Pagers?
 Level Starts as Closed?



Room Information

Organization: Check In/Children
Reports To: Toddlers
Room ID: ROOM 20 Description: Toddlers Room 20
1. Details | 2. Small Group Info | 3. Involvement
Active?
Roll Heading:
Room Nu: 20
Category:
Started: ...
Check-In Settings:
Check-In Class Maximum: 6
Group Starts as Closed?

Update Unmanned Stations with Polling

Polling is a great feature for managing multiple Check-In kiosks from one location. Polling allows you to select an organization, an attendance type, and a check-in date from one station, and push these settings to other workstations without walking to each station, exiting the unmanned mode, and choosing new settings. This is particularly useful for school-like environments, where check-in class settings may change every hour as students change classes.

Polling Modes

There are two polling modes: **Unmanned Polling Operation** and **Unmanned Polling Touch Operation**.

For polling to work at any unmanned kiosk, the workstation must be in one of these two operational modes. These options tell the workstation to “listen” for changes on the server so that when the polling criteria on the server change, the workstation changes to match. Apart from the “listening” mode, there is no difference between the polling operation choices and the corresponding non-polling operation choices.

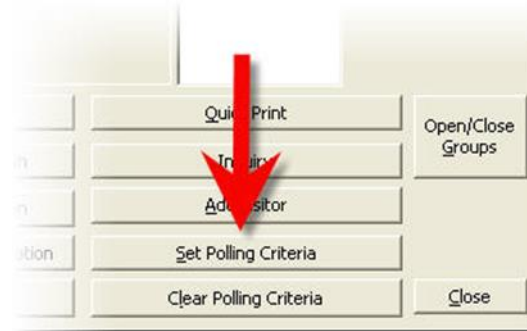
Standard Polling

Standard polling requires one manned workstation. Someone at that station updates the polling criteria, which is then disseminated to all the unmanned workstations that are in a polling mode.

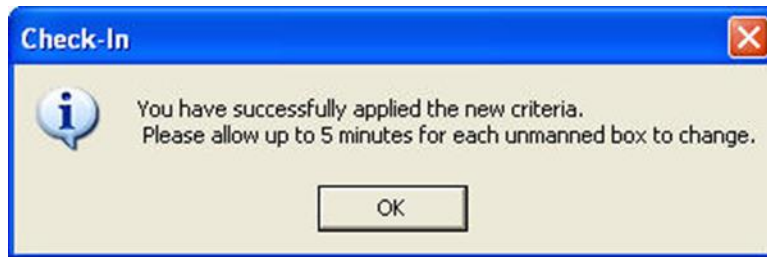
Set Polling Criteria

Polling Criteria refers to a file located on the server that contains information about the currently active **organization**, **meeting date**, and **mark as** option.

After setting these three values at a manned station, click the **Set Polling Criteria** button to send the current settings to the server file



When the polling workstations check the server file and notice the changed criteria, they will update themselves to match the polling criteria settings. A warning appears whenever you click Set Polling Criteria, warning you that the change may take up to five minutes. Typically the change will happen much more rapidly.

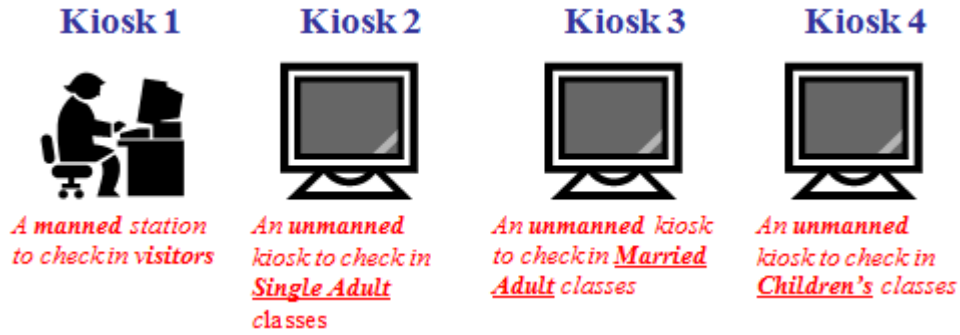


Clear Polling Criteria

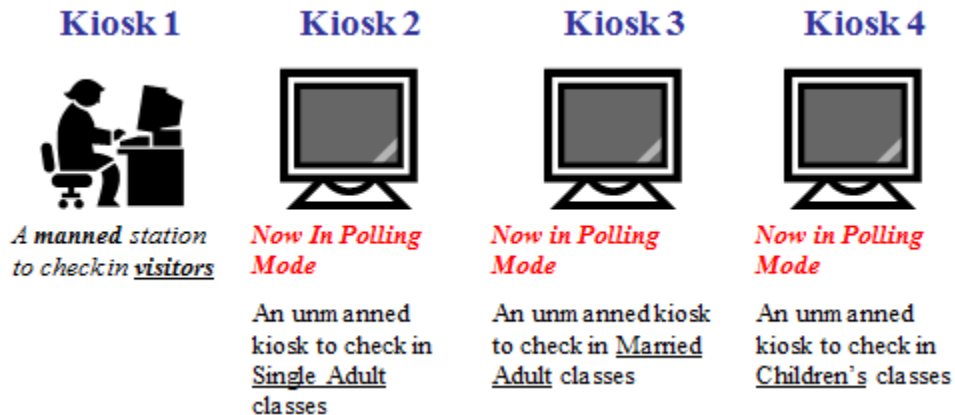
Clicking the **Clear Polling Criteria** button disables polling on all kiosks until someone can walk to each remote kiosk and set it back to polling mode. When you disable polling, the remote kiosk will continue working in unmanned mode, but will not receive any additional criteria change requests. The stations will continue using the same settings last assigned.

Polling in Action

For a detailed account of Check-In's polling feature, consider the following scenario. First Church of the City has implemented Check-In. They have set up five check-in stations. Four kiosks are for managing Sunday School classes. One Sunday School kiosk is a manned station, mainly used for assisting visitors. The other three Sunday School kiosks are unmanned stations.

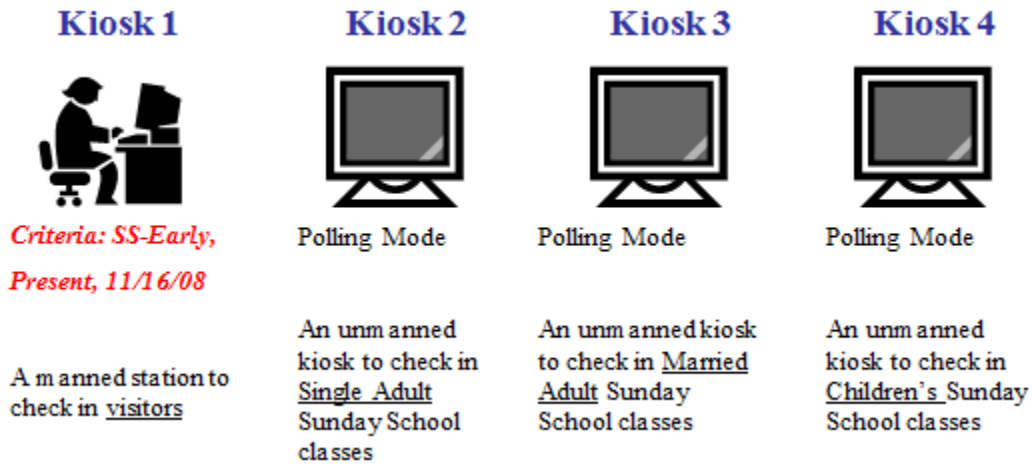


Since they have early and late Sunday School classes, First Church wants the unmanned Sunday School kiosks to be set up for polling. That way the attendant at the manned kiosk can change the polling criteria without going to each of the unmanned stations and changing the criteria manually. The attendant starts the day by going to each of the unmanned kiosks and setting them to unmanned polling mode.

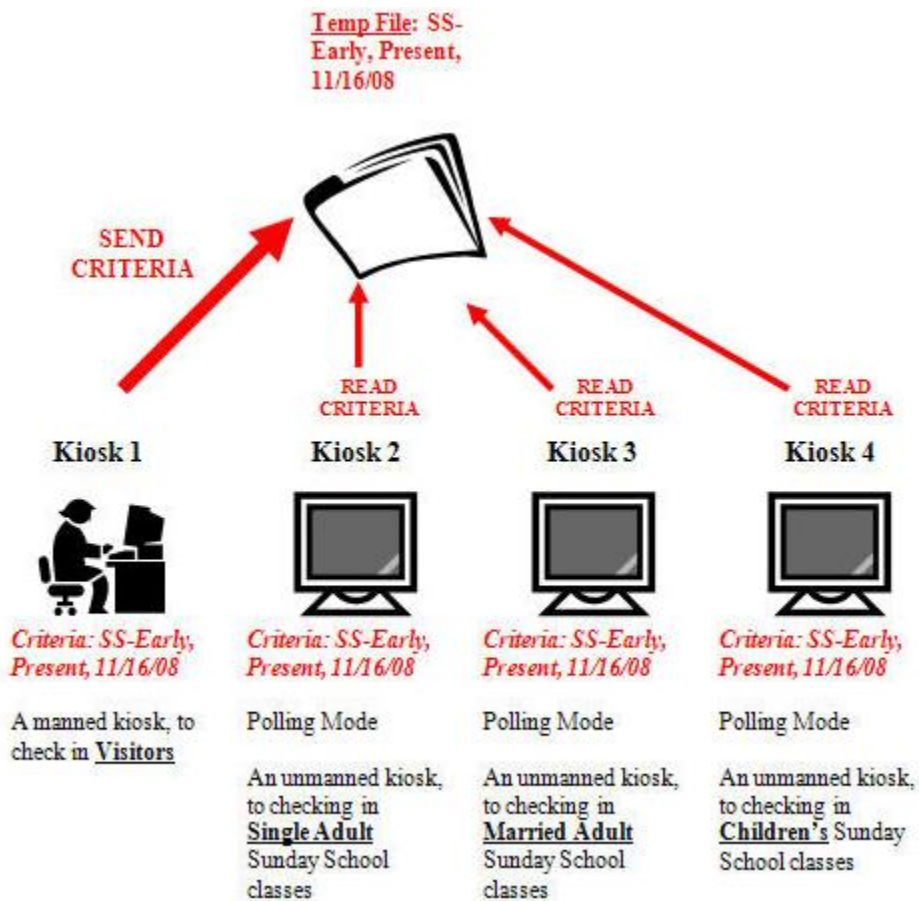


Next, the attendant sets the criteria for the first Sunday School service, choosing the **Sunday School – Early** organization, **Present** for the **Mark As** attendance type, and **November 16, 2008** as the **Meeting Date**.

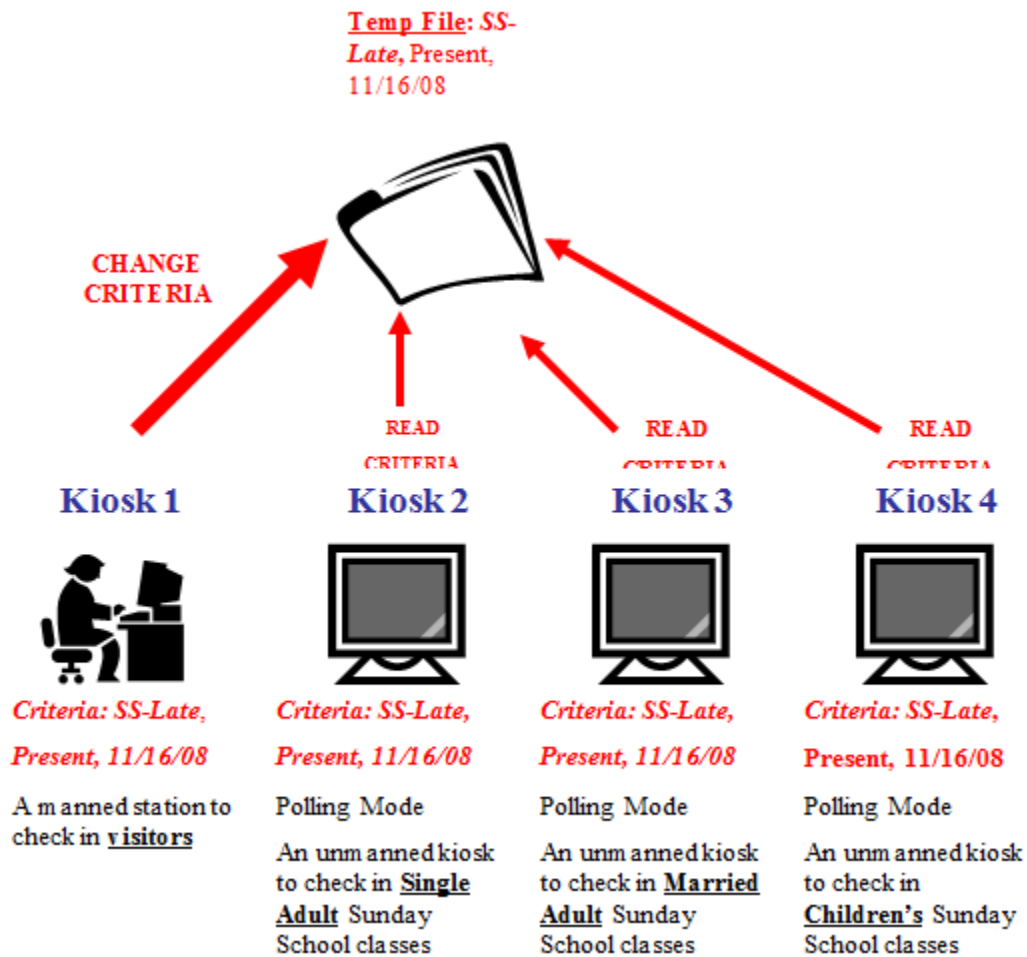
The attendant wants the unmanned stations to use these criteria as well, but remembers that the nursery kiosk will not change settings today. The attendant goes to the nursery kiosk and sets it up in unmanned non-polling mode. Now, the nursery kiosk will not change settings when the attendant sets new polling criteria.



To send the criteria to the polling stations, the attendant clicks the **Set Polling Criteria** button on the Check In Procedure screen. The criteria are then written to a temporary file within the Shelby Systems program. Every few seconds, each polling kiosk reads this “temp file” for new changes. Once changes are made to the “temp file,” the new criteria are set up on every polling station on the network.



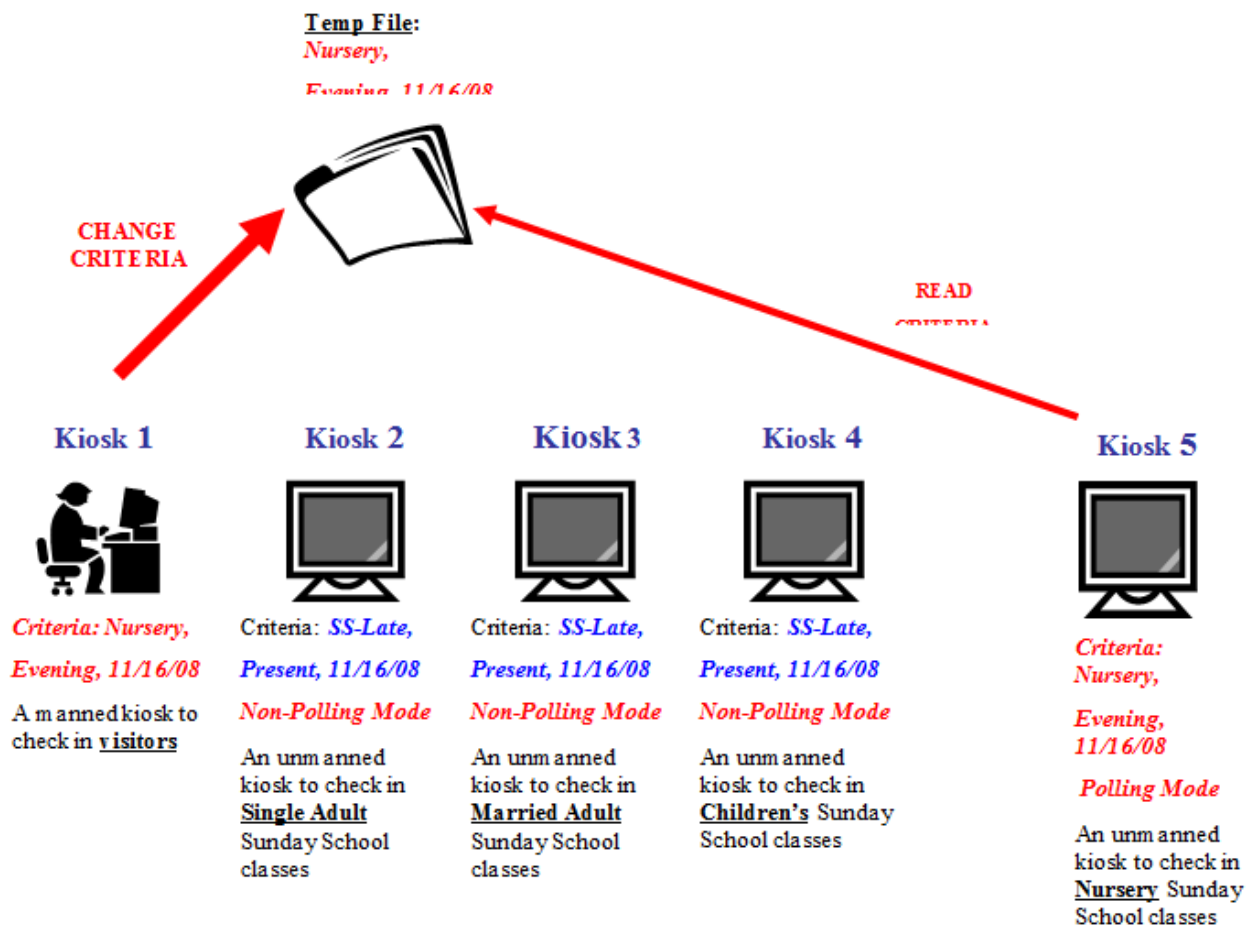
When it is time to change to the late Sunday School class service, all the attendant has to do is change the criteria on her station and click the **Set Criteria** button. Within a few seconds, the criteria will also change on the polling kiosks.



It is important to note that there is no “master” kiosk, or station where polling criteria must always be set. An attendant can set new polling criteria at *any* Check-In station.

At some point later in the day, the attendant wants to change the nursery kiosk to polling, but wants to use different criteria, say the **Nursery** organization, **Evening** for the **Mark As** attendance type, for **November 16, 2008**. However, the attendant does not want the Sunday School kiosks to change criteria, because some attendees in the *Sunday School - Late* organization have not yet checked out. In other words, the attendant wants to force all kiosks currently in polling mode to discontinue polling so that the attendant can set up a new polling relationship for only the manned kiosk (kiosk #1) and the nursery kiosk (kiosk #5). Without actually walking to the Sunday School kiosks (kiosks #2, #3, and #4), the attendant can turn off those stations’ polling modes by clicking the **Clear Polling Criteria** button on the manned kiosk. Then, the attendant can walk to the nursery kiosk and set it up to use polling criteria.

The Sunday School kiosks will retain the last criteria (**SS-Late, Present, 11/16/2008**) until manually changed at each station.



Auto Polling

Auto polling does not require any staffed stations or any manual updates to the polling criteria. Instead, the system will automatically shift from organization to organization based on the date and time defined in your organizations' setup screens.

Preparing for Auto Polling

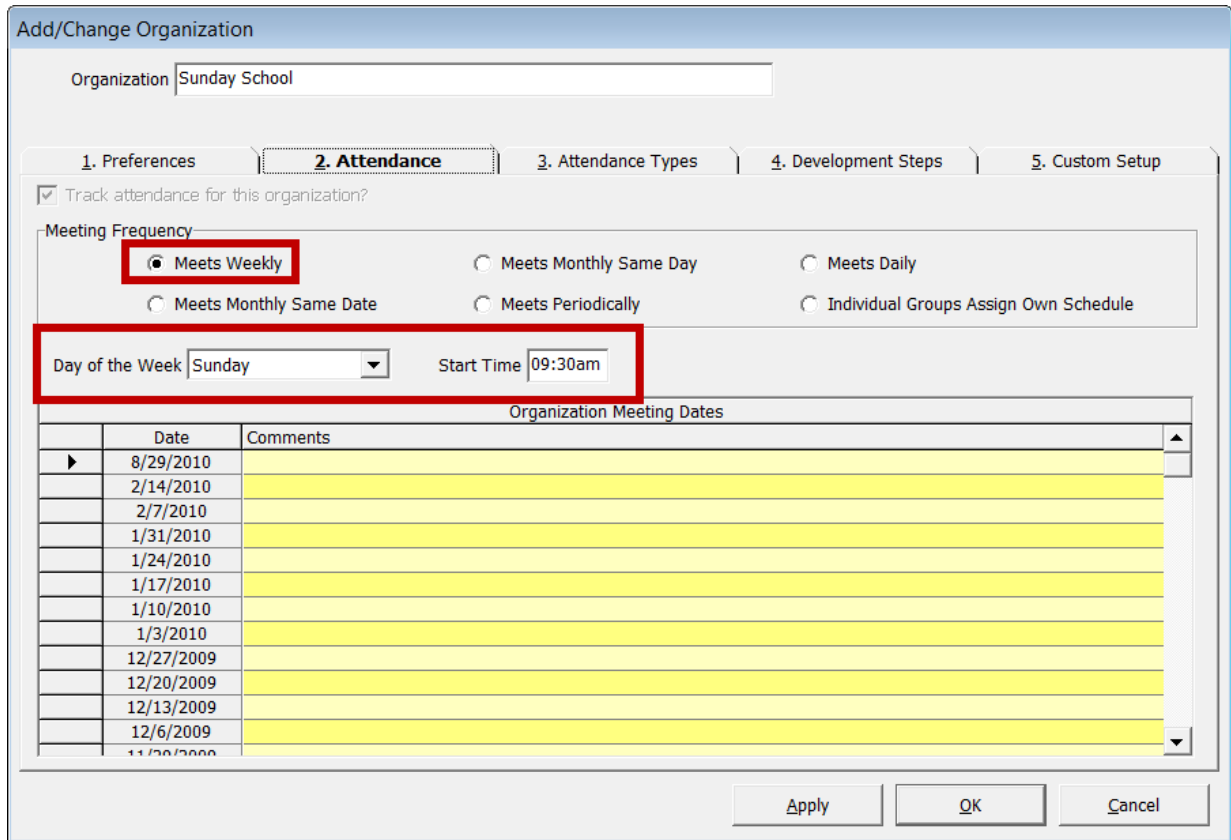
Before auto polling will work, each organization must have a **Day of the Week** and a **Start Time** defined. If either of these is missing, the auto polling process will never select that organization.

It is easiest to set up auto polling for weekly meetings that always start at the same time. For any other types of meetings, use Standard Polling.

To set the day and time for an organization, open the Membership Home Base and click on Organizations. Right-click on the organization you want to update and click Open.

Change to the Attendance tab. Define the **Day of the Week** and **Start Time**, illustrated below. As you enter the Start Time, keep in mind that the Start Time is the time at which Check In will start checking people into that

organization. Set the time **earlier** than the actual start of the meeting so that people can check in whenever they arrive. In addition, once auto polling sees that it is time to start checking people into a new organization, the prior organization will no longer be available. Auto polling does not allow for any “overlap” with two organizations.



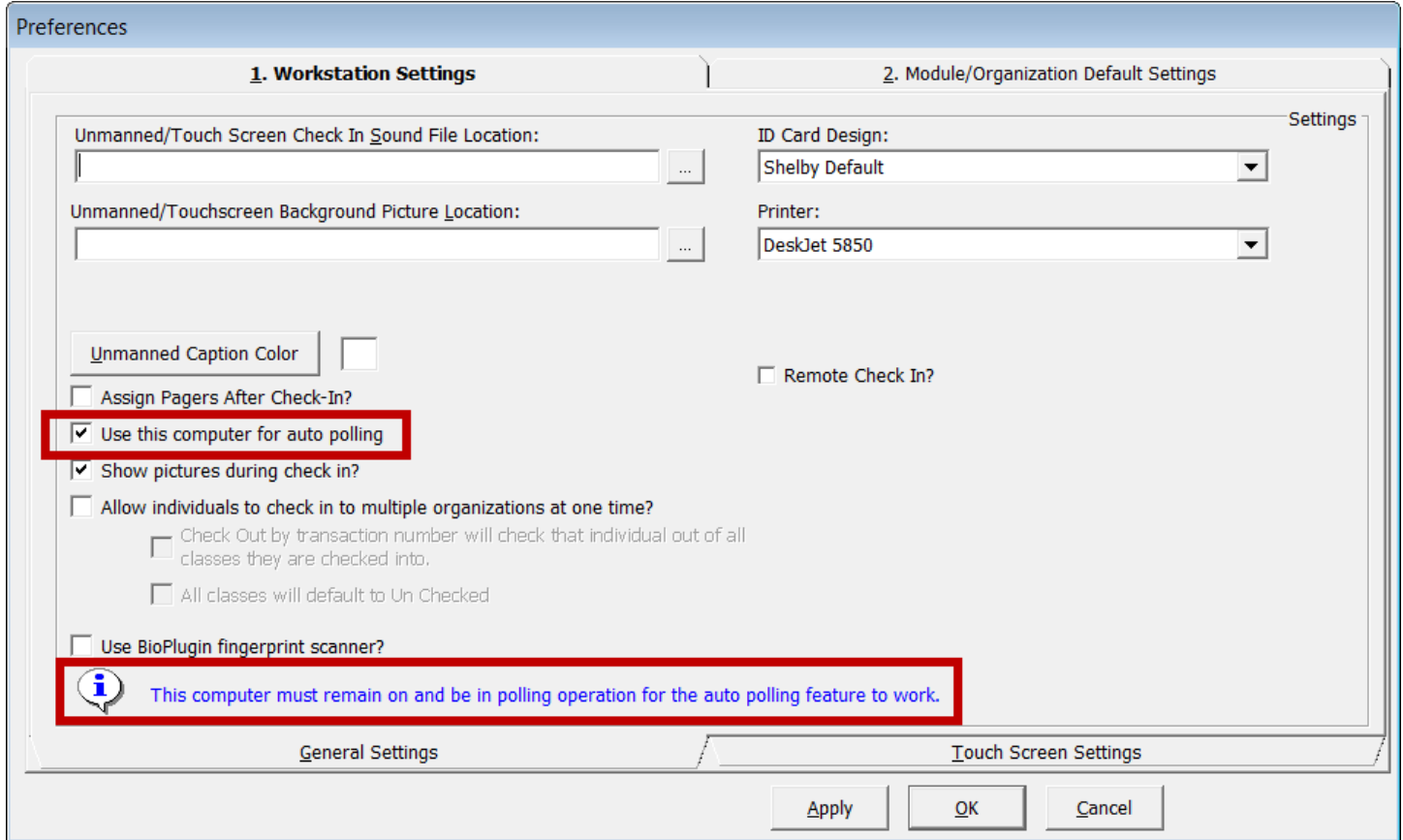
Enabling Auto Polling

Once you have the organizations set up completely, you are ready to enable auto polling. Do this from the **Preferences** utility in Check In.

Go to one of the kiosk workstations that will always be on and in a polling operation mode. Open the Preferences utility. It opens first to the **Workstation Settings / General Settings** tab, which is where you check the box to **Use this computer for auto polling**.

Check-In Quick Reference

Note the informational text that appears when you check the box for auto polling: “This computer must remain on and be in polling operation for the auto polling feature to work.”



For as long as the auto polling workstation remains on and in polling operation mode, it will check the computer’s date and time every five minutes and compare the time against the available organizations’ Day of the Week and Start Time values. When it finds a match, it will shift the polling criteria automatically to the new organization. It will use the current date as the attendance date.

Because the computer’s date and time need to be accurate, it is best to synchronize the workstation’s clock with the server’s clock, and also to synchronize the server’s clock with an Internet date and time service. Your network administrator should be able to assist with the clock synchronization settings.

Reports

Now that you know how to check individuals in, you may want to know how to find out quickly who has checked in to which classrooms. The Check-In module has several useful reports to assist with this task.

Check-In Individual Report

The Check-In Individual Report displays the individual’s bar code number and prints an attendee’s comments. You limit which individuals print by selecting a particular level or group.

To run this report, click the **Reports** link on the Check-In Home Base screen, and then click **Check-In Individual Report**.

Begin by selecting a level or group. If you want to see all individuals in a particular level, fill in all levels up to that level. If you want to see all individuals in a particular group, fill in all level fields. If you want to see all individuals in the organization, then leave all fields blank.

Select which comments you want to print on the report and click **OK** to run the report.



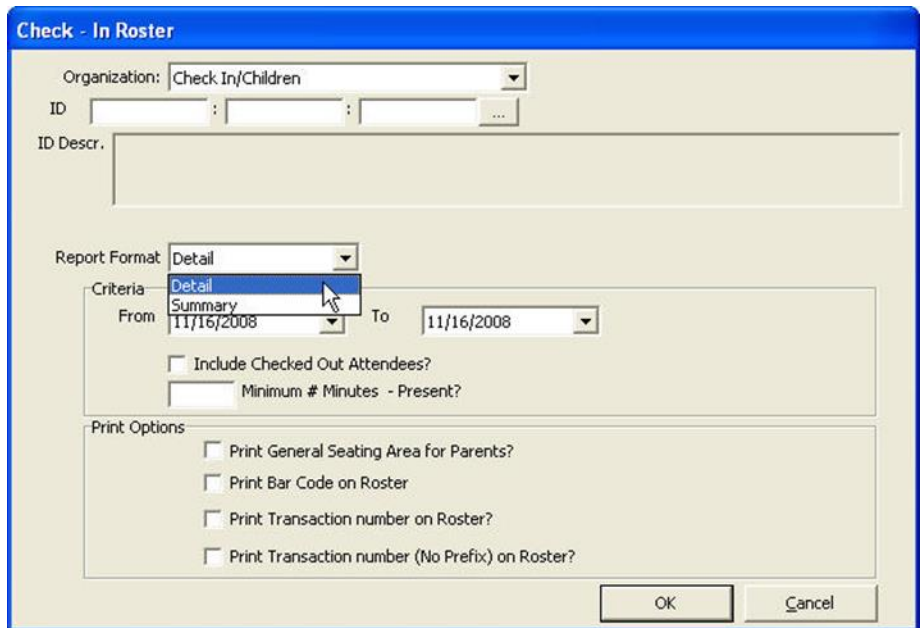
Run Date 11/18/2008		Check-In Individual Report	
Time 14:55:42		Room: NURSERY/TODDLERS/ROOM 20	
Name	Bar Code		
Alvarez, Carmel		Allergies:	Peanuts
Anderson, Howard		General Seating Area:	Section 3E
Atlas, Aidia		General Seating Area:	Section 2D
		Allergies:	Bee stings

Check-In Roster

The Check-In Roster report allows you to see who has checked in to which group and when attendees checked out. The report also displays pager numbers and the general seating area of parents, if specified.

To run this report, click the **Reports** link on the Check-In Home Base screen, and then click **Check-In Roster**. Begin by selecting a level or group. If you want to see all individuals in a particular level, fill in all levels up to that level. If you want to see all individuals in a particular group, fill in all level fields. If you want to see all individuals in the organization, then leave all fields blank.

Next, choose either a Detail or Summary report. The Detail report displays the checked-in individuals, their check-in and check-out times, their pager numbers, and their comments. The Summary report does not display attendee details; rather, it lists each group in the organization and displays how many leaders, attendees, and Quick Print visitors there are in the group.



The Detail Check-In Roster

Run Date 11/18/2008 Time 15:07:51	Detail Check-In Roster for Check In/Children Room: NURSERY/TODDLERS/ROOM 21 11/16/2008 Room 21		
	Check-In	Check-Out	
<u>Name</u>	<u>Time</u>	<u>Time</u>	<u>Pager #</u>
Anderson, Howard (#47)	02:54:24 PM		102
Gilbert, Jude (#418)	03:07:15 PM	03:07:31 PM	102
NURSERY/TODDLERS/ROOM 21 Total: 2			
Check In/Children Total: 4			

The Summary Check-In Roster

Run Date 11/18/2008 Time 15:03:40		Summary Check-In Roster for Check In/Children 11/16/2008					Page 1	
ID	Description	Room #	Room Max	Leavers	Attendees	Quick	Checked Out	Total
NURSERY/BEDBAB/ROOM1	Room 1	1	0	0	0	0	0	0
NURSERY/BEDBAB/ROOM2	Room 2	2	0	0	0	0	0	0
NURSERY/BEDBAB/ROOM3	Room 3	3	0	0	0	0	0	0
NURSERY/CREEPERS/ROOM 14	Creepers Room 14	14	6	0	0	0	0	0
NURSERY/CREEPERS/ROOM 16	Creepers Room 16	16	3	0	0	0	0	0
NURSERY/TODDLERS/ROOM 20	Toddlers Room 20	20	6	0	2	0	0	2
NURSERY/TODDLERS/ROOM 21	Toddlers Room 21	21	3	0	1	0	0	1
OLDERCH/GRADE4/ROOM 40	Grade Four Room 40	40	0	0	0	0	0	0
OLDERCH/GRADE4/ROOM 41	Grade Four Room 41	41	0	0	0	0	0	0
OLDERCH/GRADE5/ROOM 45	Grade Five Room 45	45	0	0	0	0	0	0
OLDERCH/GRADE5/ROOM 47	Grade Five Room 47	47	0	0	0	0	0	0
OLDERCH/GRADE6/ROOM 48	Grade Six Room 48	48	0	0	0	0	0	0
OLDERCH/GRADE6/ROOM 49	Grade Six Room 49	49	0	0	0	0	0	0
PRESCH/FIVE/ROOM 30	Five Year Room 30	30	0	0	0	0	0	0
PRESCH/FIVE/ROOM 31	Five Year Room 31	31	0	0	0	0	0	0
PRESCH/FOUR/ROOM 10	Four Year Room 10	10	0	0	0	0	0	0
PRESCH/FOUR/ROOM 12	Four Year Room 12	12	0	0	0	0	0	0
YOUNGCH/GRADE1/ROOM 50	Grade One Room 50	50	0	0	0	0	0	0
YOUNGCH/GRADE1/ROOM 51	Grade One Room 51	51	0	0	0	0	0	0
YOUNGCH/GRADE2/ROOM 54	Grade Two Room 54	54	0	0	0	0	0	0
YOUNGCH/GRADE2/ROOM 55	Grade Two Room 55	55	0	0	0	0	0	0
YOUNGCH/GRADE3/ROOM 56	Grade Three Room 56	56	0	0	0	0	0	0
YOUNGCH/GRADE3/ROOM 57	Grade Three Room 57	57	0	0	0	0	0	0
11/16/2008 Totals:			0	3	0	0	3	

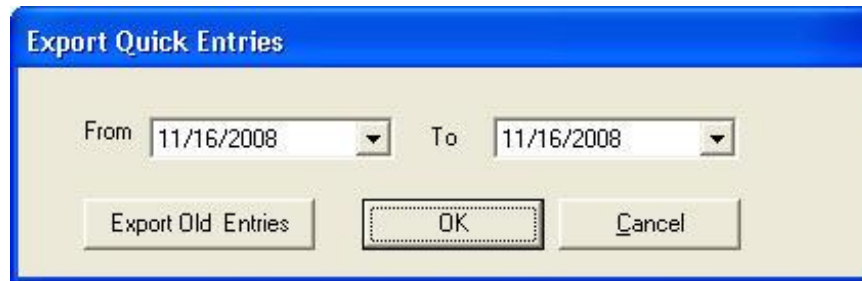
Import/Export Visitor Information

Two options on the **Utility** menu allow you to transfer Quick Print entries into your GlobaFILE database. The first is the **Export Quick Print Entries**. This utility allows you to export your Quick Print entries to an Excel® spreadsheet, make changes to the Quick Print entries, and then import the records into GlobaFILE.

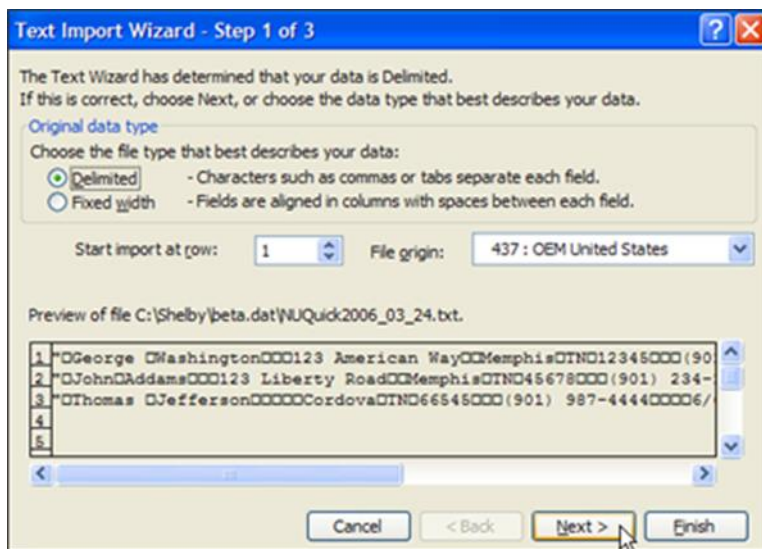
The second utility is the **Import Quick Entries** utility. This utility is quicker; it allows you to import your Quick Print entries directly into GlobaFILE. However, you cannot make changes to the entries before importing, nor can you remove certain individuals that you do not want to import into GlobaFILE prior to running the utility.

Export Quick Print Entries

After you have created Quick Print entries, launch the **Export Quick Print Entries** utility. From the Check-In Home Base screen, click on **Utility** on the menu bar at the top of the screen and then click **Export Quick Print Entries**. Choose a date range of individuals to include in the export file.

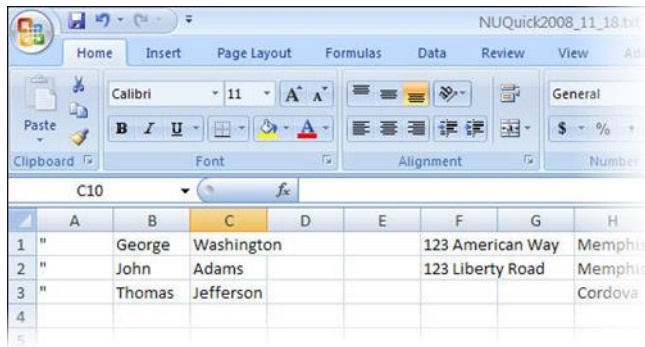
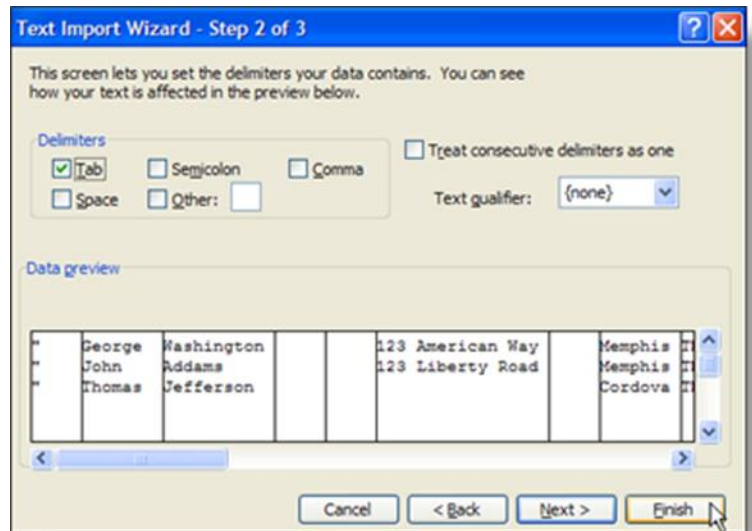


Click the **OK** button. You will receive a message stating that a file named *NUQuick2008_XX_XX.txt* has been created, where *XX_XX* is the system date of the computer (today's date). This file is created in your *ssv5.dat* folder by default.



Open Microsoft® Excel®, and then open the exported file. The *Text Import Wizard* will begin. Leave the **Delimited** radio button selected and click **Next**.

Choose **{None}** from the *Text Qualifier* pull-down field and click the **Finish** button.



Make needed changes to the Excel® file, such as adding additional information or removing some records, and resave the file.

The chart below indicates each column's purpose.

Column	Function	Column	Function	Column	Function
A	Title	B	First/Middle	C	Last Name
D	Suffix	E	Organization	F	Address Line 1
G	Address Line 2	H	City	I	State
J	Postal Code	K	Country	L	Additional Comments
M	Main/Home Phone	N	Mail Status	O	E-mail Address
P	Web Address	Q	Birthdate	R	Gender
S	Marital Status	T	Envelope Number	U	Module
V	Record Status	W	How Received	X	Date 1
Y	Date 2	Z	Date 3	AA	Date 4
AB	Date 5	AC	Date 6	AD	Date 7
AE	Date 8	AF	Date 9	AG	Date 10
AH	Area	AI	Region	AJ	District
AK	Mail	AL	Fund Appeals		

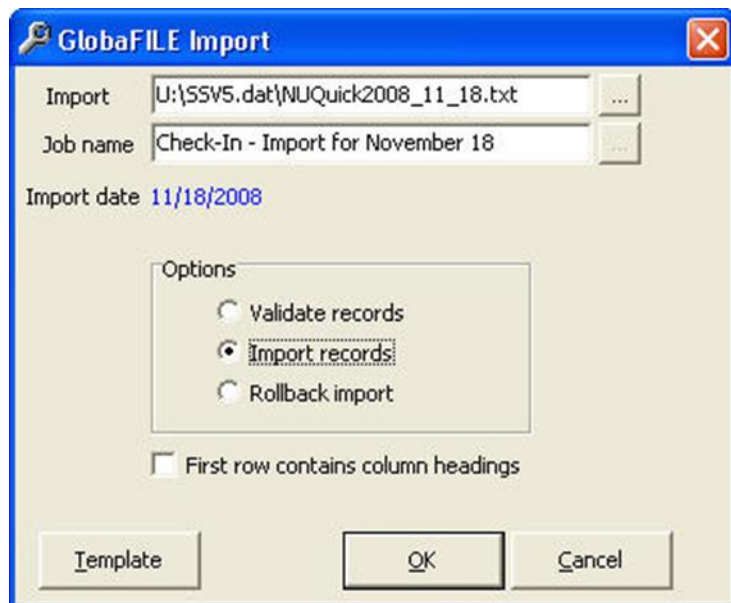
For more information about the import format, search for **File Layout for Import into Shelby GlobaFILE** in the Shelby Systems Help files (click **Help** on the menu bar at the top of any Shelby Systems screen and the click **Table of Contents (All)**).

Import the Tab Delimited File into GlobaFILE

After saving the edited export file, you are ready to import the file into GlobaFILE.

Begin by launching the **Utilities** module. Click the **ShelbyTOOLS** link on the Utilities Home Base screen. Next, select **GlobaFILE Record Import** and click the **Run** button. Choose **Yes** to confirm the action.

Use the pick-button to locate the export file. Then type in a job name for this import. You should run the Validate Records utility (under the Options button group) prior to importing. If you are unhappy with the results of the import, you can “roll back” the changes by referring to this job name



Select the **Import Records** radio button. Leave the **First Row Contains Column Headings** check box unchecked. Finally, click the **OK** button. The Quick Print entries are now part of the GlobaFILE database.

Import Quick Entries

The Export Quick Print Entries utility does not automatically enroll the attendees in the group they attended.

The Import Quick Entries utility can, however, enroll individuals in the group they have attended.

The Import Quick Entries utility allows you to send the Quick Print entries straight to GlobaFILE without having to use the GlobaFILE Record Import utility.

However, as mentioned previously, you will not be able to edit the entries before importing; all entries (for the selected date range) import as originally entered. You can select which entries you want to import by organization, however. You cannot do this using the Export Quick Print Entries.

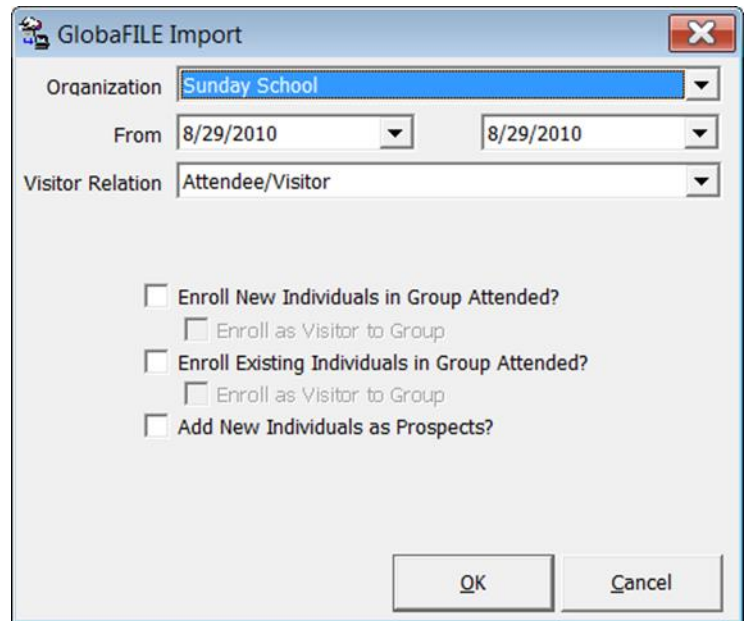
After you have created Quick Print entries, launch the **Import Quick Entries** utility. From the Check-In Home Base screen, click on **Utility** on the menu bar at the top of the screen and then click **Import Quick Entries**.

Check-In Quick Reference

Select a specific organization to import only those attendees into GlobaFILE, or select All Organizations to import all attendees.

Choose a date range of Quick Print individuals to include in the import.

Select the **Visitor Relation**, which will connect the primary attendee to the visitor using Other Relations information. This is only applied for visitors added as part of a “Check in with Visitor” process.



The screenshot shows the 'GlobaFILE Import' dialog box. It features a title bar with a close button (X). Below the title bar, there are three dropdown menus: 'Organization' (set to 'Sunday School'), 'From' (set to '8/29/2010'), and 'Visitor Relation' (set to 'Attendee/Visitor'). Below these are three main checkboxes, each with a sub-checkbox: 'Enroll New Individuals in Group Attended?' (unchecked), 'Enroll Existing Individuals in Group Attended?' (unchecked), and 'Add New Individuals as Prospects?' (unchecked). The sub-checkboxes are 'Enroll as Visitor to Group'. At the bottom right, there are 'OK' and 'Cancel' buttons.

Select the **Enroll New Individuals in Group Attended** check box if you want to enroll the Quick Print entries in the groups they attended.

Select the **Enroll Existing Individuals in Group Attended** if you want to enroll a visitor in the same group that the visitor’s host attended (this feature is used when the **Checking in with Visitor** check box is selected).

If you want to import new Quick Print attendees as Prospects (instead of Members), select the **Add New Individuals as Prospects** check box.

Click **OK** to complete the import. The Quick Print entries are now part of the GlobaFILE database.

Remote Check In

Remote Check In allows you to take a laptop or other computer away from the home office to a remote location, use the portable system as a fully functional check-in station, and even have read-only access to all the other modules of Shelby v.5.

Preparing the Remote Check In Workstation

The remote computer system may be a laptop, a desktop, or any computer capable of running a standalone installation of Shelby v.5. These instructions will refer to the “remote workstation” to mean any type of computer used for remote check-in purposes.

Step 1: Ensure the Remote Workstation Meets Minimum Requirements.

Most importantly, the remote workstation must meet the minimum requirements for a **Standalone PC or Workgroup Server**, as described in the Hardware Requirement document, found at [this link](#). That document is always current.

The synchronization between the home office system and the remote workstation will be easiest if they are on the same version of SQL Server. They do not need to be the same edition; i.e., it is perfectly acceptable for the home office to be on SQL Server 2012 Standard while the remote workstation has SQL Server 2012 Express.

- Internet Explorer 8.0
- DVD-ROM

Step 2: Install Shelby v.5.10.1000 or Later

After ensuring that your remote workstation meets these requirements, you must install Shelby v.5 on the workstation so that it is running as a standalone PC. This workstation **must not** be a client to the home office installation of Shelby v.5.

As with the SQL Server version, the synchronization of the home office system and the workstation will be easiest if they are on the same version of Shelby v.5. At a minimum, they must both be running v.5.10.1000.

Step 3: Backup the Home Office Shelby v.5 Database and Restore It on the Remote Workstation.

Use the **Shelby SQL Backup-Restore Utility** to back up your home office Shelby v.5 database to a .bak file. This must be done on the home office Shelby v.5 server.

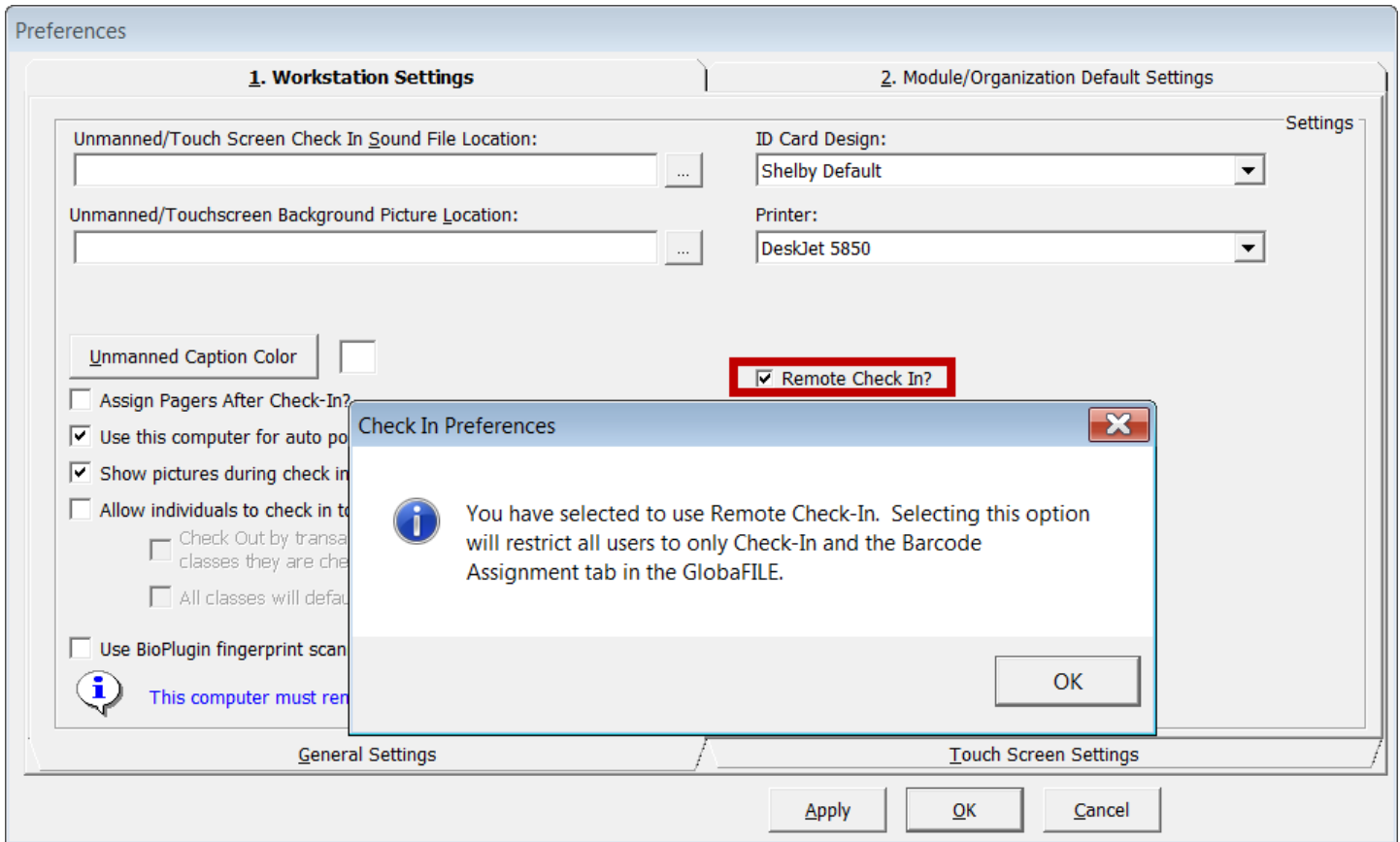
Copy the .bak file from the home office server onto the remote workstation using any convenient method.

Use the **Shelby SQL Backup-Restore Utility** on the remote workstation to restore the backup of the home office data to the Shelby v.5 database on the remote workstation.

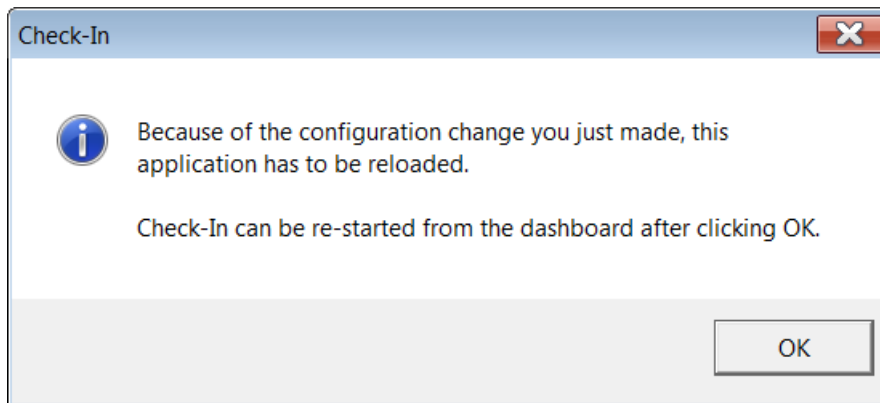
Step 4: Turn on the Remote Check In Mode for the Remote Workstation.

Log into Shelby v.5 on the remote workstation. All of the current user accounts on your home office system will be available to you because you just restored your home office database to the workstation.

Open Check In from the Dashboard and then open the Preferences utility. Put a checkmark next to **Remote Check In**. When you check this box, you will see the warning that it will restrict users to the Check In module and Bar Code Assignment information. This means users will be restricted to read-only access to all screens except the Check In module and Bar Code Assignment information.



You may also see a message warning that the module must be re-loaded because of this change. Simply click OK to allow Check In to close.



Using the Remote Workstation

Once you have followed the steps to prepare the remote workstation, you may use it for Check In just as you would any home office workstation as described in this document. The only difference is that all other information remains locked in a “read-only” mode.

The **Add Visitor** button remains on the Check In Procedure screen, but in Remote Check In mode, it is only a way to look up information on people already in Shelby v.5. On a remote workstation, it is not possible to add names directly to the database using **Add Visitor**, **GlobaFILE Information**, or **Membership Information**.

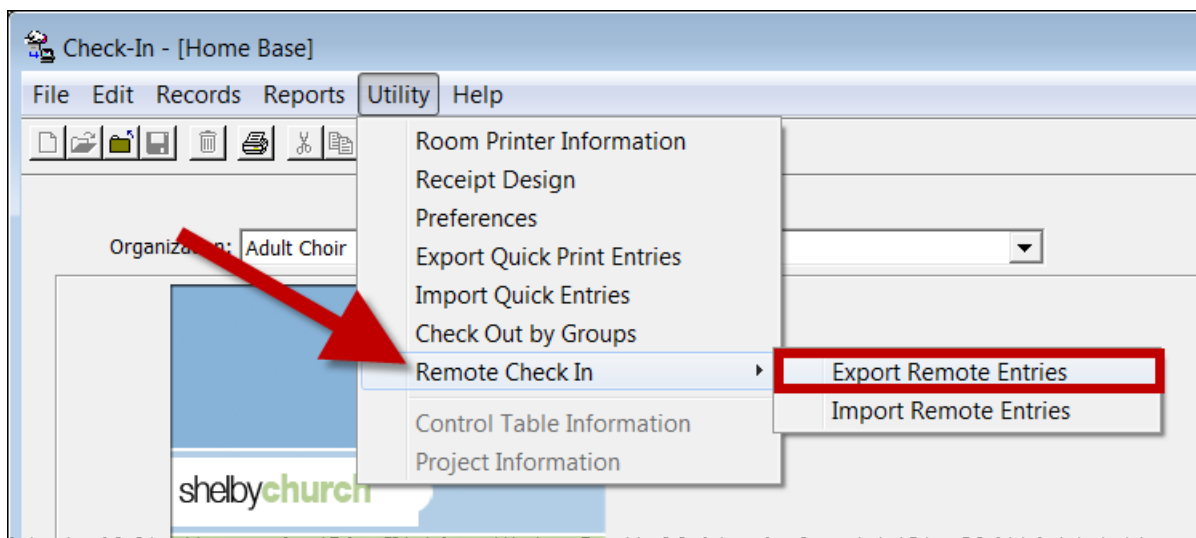
Even though it is not possible to add names to Shelby v.5 using the usual methods, it is possible to add new people using the **Quick Print** tool. The utility to **Import Quick Print Entries** is also active, so that you may import the names into GlobaFILE as was described earlier in the section covering that utility.

Synchronizing the Home Office Database with the Remote Workstation

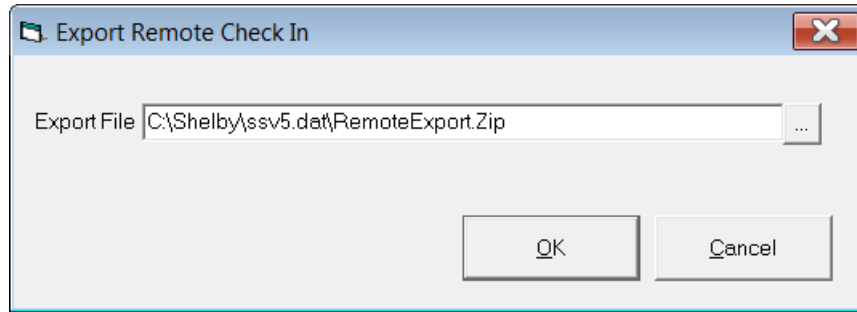
After the event has concluded and you have returned to the home office with the remote workstation, the next step is to synchronize the attendance history by exporting the history from the remote workstation and importing it into the home office database.

Step 1: Export the Attendance History on the Remote Workstation.

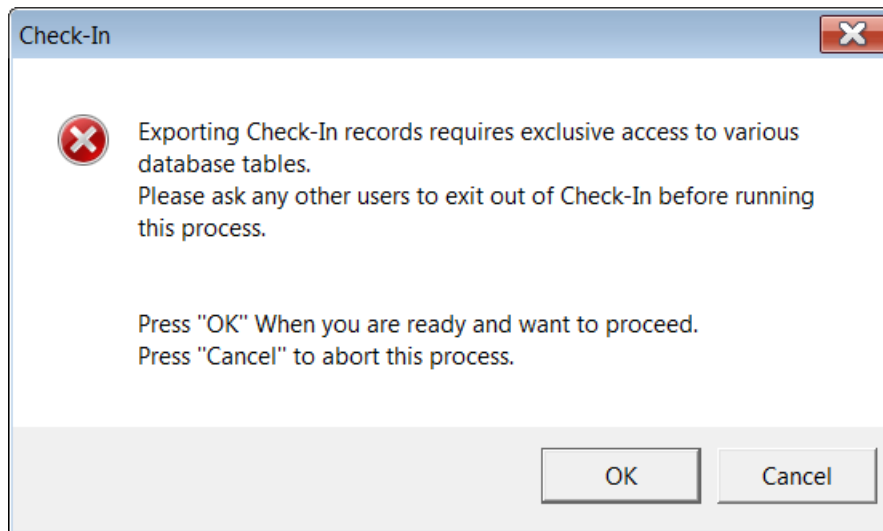
Open the Check In module and choose **Utility > Remote Check In > Export Remote Entries**.



Set the file path and file name for the exported attendance history. If you rename the file, make sure it still ends with **.zip**. Take note of the path. Then click OK.



You will see a warning about exclusive access to the Check In tables. If you are running the remote check in on a laptop, you can click OK on the warning without concern. If you are running multiple check-in workstations at a remote location and using the primary remote workstation as a server, then you do need to heed the warning and make sure no one else is in the Check In module before you perform the export process. Then click OK.



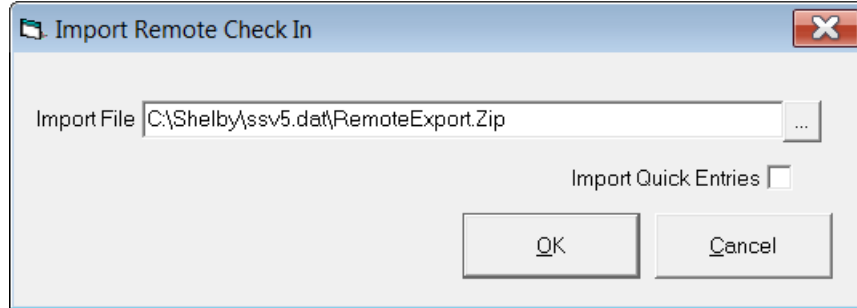
Step 2: Import the Remote Attendance History into the Home Office Database.

Move the file from the remote workstation to any home office workstation using any convenient method. You do not have to be on the server.

On your home office workstation, open Check In and then choose **Utility > Remote Check In > Import Remote Entries**.

Check-In Quick Reference

Use the Search (...) button to the right of the Import File text box to browse the computer and locate the .zip file that you moved from the remote workstation.



When the **Import Quick Entries** box is checked, the names entered using the Quick Print tool on the remote workstation may be imported into GlobaFILE in exactly the same way as described earlier in this document for the Import Quick Entries utility.

Once this process concludes, your home office database will contain the attendance history taken with the remote check-in workstation.