# Check-In Kiosk

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# General Information

# What is the HandsOn Connect Check-In Kiosk?

The HandsOn Connect Check-In Kiosk can allow you or your partners to check-in volunteers on-site for date and time specific Volunteer Opportunities on the day they take place, removing the need for you to report attendance manually post-event.

The HandsOn Connect Check-In Kiosk is an add-on to HandsOn Connect. For information on pricing and getting this added to your instance of HandsOn Connect, please open a support ticket here in the help center.

The check-in kiosk:

- Allows volunteer to quickly check themselves in at the project site, using only their email address.  There is also a configuration available that will allow volunteers to print an "Access Pass" with a QR code that will allow them to check-in simply by scanning their code.
- Supports configurations for walk-in and guest volunteers, team check-ins, and optional 'check out' functionality.  (Note: Guest and Team check-in is only available for Date & Time Specific Volunteer Opportunities,  not for Individually Scheduled Volunteer Opportunities.)
- Can be displayed on one or more laptops, tablets or smartphones to facilitate check-ins of large or small projects.

How the kiosk operates for your organization is determined by the configuration you choose when you order your kiosk. See this chapter on kiosk configuration options.

# What will and won't appear for check-in in the Kiosk?

The Check-In Kiosk's operation will vary depending on the configuration you've chosen for the check-in Kiosk. This will determine whether or not guests can check-in (and how), and whether or not teams can check-in. The configuration also determines whether or not the check-in / check-out functionality exists in your kiosk.

This article will give you additional information about which volunteer opportunity types, and connection types will or won't appear for check-in.

## Date & Time Specific Opportunities can be used with the check-in kiosk

Date & time specific opportunities, where both the Volunteer Opportunity and the Occurrence are in active status are available for checking-in via the kiosk.

## What about Date & Time specific opportunities/ occurrences in Admin status?

Volunteers who have **existing** connections to opportunities where either the Volunteer Opportunity or the Occurrence is in admin status **will** be able to check-in for those connections.

However, guest check-in is not available for opportunities/occurrences in admin status. Guest check-in is only available for active opportunities / occurrences.

The function of admin status for opportunities and occurrences is that connections to these occurrences are made administratively only and volunteers can not sign up for these opportunities via the public site. So for that reason, they do not appear in kiosk search as valid opportunities to check-in for.

However -- those with existing connections to these opportunities, WILL be able to check-in for them.

# Private Opportunities (with invitation codes)

Volunteers who have an **existing** connection to an opportunity where the Volunteer Opportunity is private and requires an invitation code **will** be able to check-in for their existing connection.

By default, guests are not able to check in for private opportunities, however, if you request that we activate the option "Allow Guests to Check-in for Private Opportunities" , then private opportunities WILL appear in the check-in kiosk for anyone to check-in for, on the day of the occurrence.

# Individually Scheduled Opportunities with Schedule

If a volunteer has a **confirmed or pending** Connection to an Individually Scheduled Opportunity (express interest with schedule), they will be able to check-in for it via the check-in kiosk.

At the present time, guests will NOT be able to check-in for ISO opportunities.  The ability for guests to check in for ISOs with schedule may be implemented in a future release.

# Individually Scheduled Opportunity (Express Interest Only)

If a volunteer has a **confirmed** Connection to an ISO (express interest only), they will be able to check-in via the kiosk.

They will not however, be able to check-in if their connection is still in pending status  (as in pending status, the connection does not have information about which day will be checking in).

So to use the check-in kiosk for ISO (express interest only),  you must confirm the connection (indicating the start date and time, end date and time) of the connection.

At the present time, guests will NOT be able to check-in for ISO (express interest only) opportunities.  The ability for guests to check in for ISOs (express interest only) may be implemented in a future release.

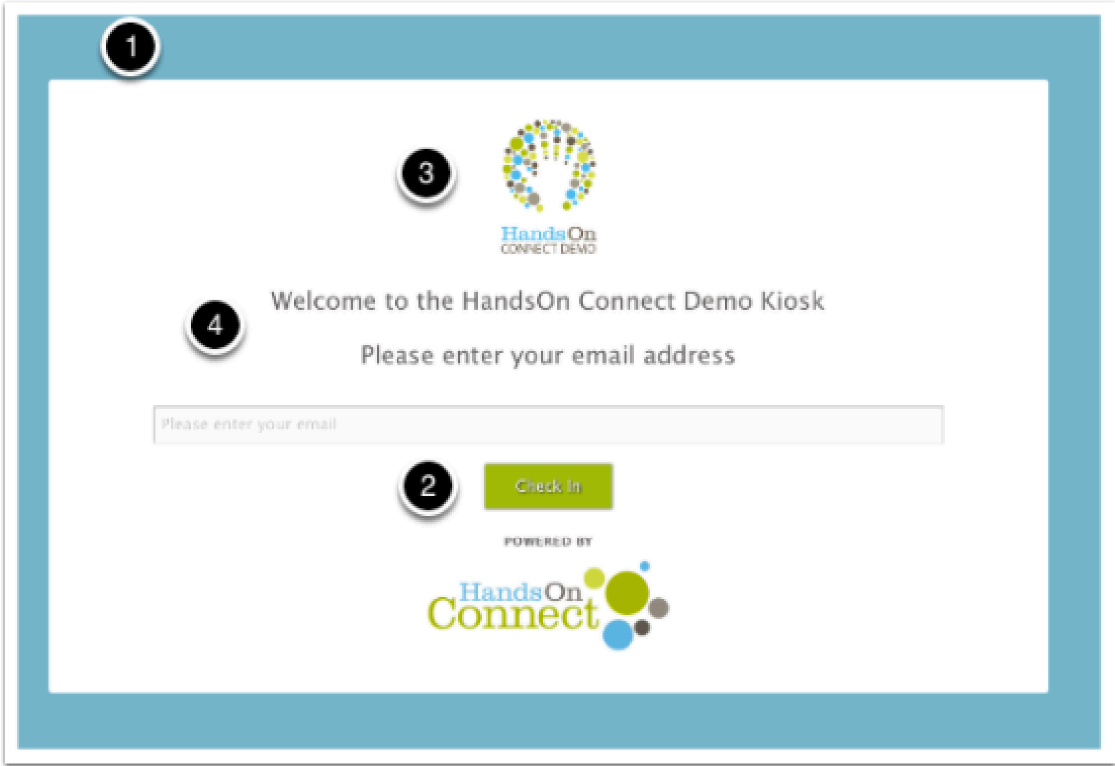
# Kiosk Configuration Options

# Configuration of Kiosk Appearance and Operation

## Options for configuring the look and operation of the check-in kiosk

You'll be asked to provide the following informatiion when your kiosk is set-up.  These settings can be updated at any time by opening up a support ticket.

1. **Background Color** (Hex Code)
2. **Button Color** (Hex Code)
3. **Logo Url** (can be the URL of your logo in HOC or any other image you add to documents or chatter files
4. **Welcome Message** (indicate the line spacing by using basic html.  Example: <p> Welcome to HOC 9001 Kiosk Demo</p><p>Please enter your email address</p>




5. **Organization Name -** This should be the same organization name that you use on your public website.

6. **Success Text** (the text you want to appear after they have completed their checkin.  Example:  "Thanks! You have successfully checked in for this opportunity"

7. **Waiver URL** - a link to your online terms and conditions (or waiver text).  This is used if you allow guests to register and create accounts.  You can use your organizations terms and conditions page /terms_and_conditions" if you wish.

HandsOnConnect Cloud Solutions

8. **Timezone:** The time zone your Salesforce instance is localized in.  This is the time zone all your opportunities are created in, even if you are using HandsOn Connect across multiple time zones.  We'll refer to this as your 'affiliate time zone'  in this documentation.

> If you are using HandsOn Connect in multiple time zones, you still create all your occurrences in your 'affiliate time zone.  That's the time zone that is set in configuration.
>
> There are special instructions for activating the local time zone if the kiosk is being used in a different time zone than your affiliate time zone.

## Kiosk Activation Code

9. **Kiosk Activation Code:**  This is the password that will be necessary to unlock the kiosk when its to be used on-site to check-in volunteers. It can be any length, and has no special requirements. Having an activation code secures your kiosk so that only kiosk operators can unlock the kiosk, thereby preventing volunteers who might see the URL for the kiosk from using it to check in from home even though they didn't show up for the project! (Those tricky devils!)

This activation code can be updated at any time by opening a support ticket and requesting a change of activation code.   (You might choose to do this if you wanted to stop people who had the original code from using the kiosk going forward, or you think its security has been compromised.)

Next:  Configure your Guest Options

# Guest Configuration Options

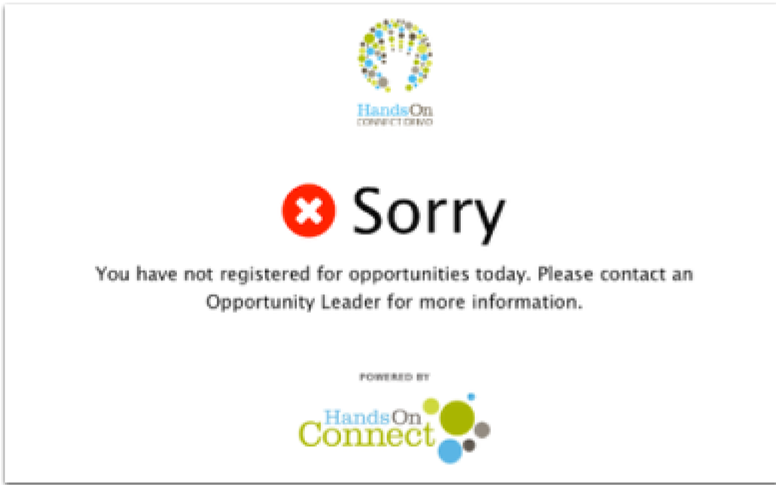
There are four different configurations available for the handling of guests (volunteers brought by other volunteers), and walk-ins (volunteers who just show up but weren't signed up with a confirmed connection)

You will be asked which guest configuration you want to use for your kiosk. (This setting can be updated in the future by request.)

Additionally there is one additional setting for the handling of private (invitation code) opportunities:

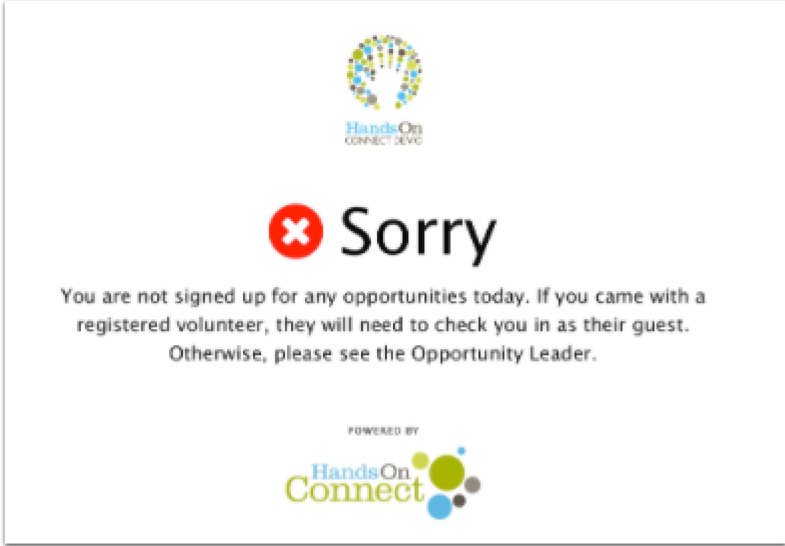
## 1. #1 Allow guests disabled

Only volunteers with confirmed connections will be able to check-in. No guests or walk-ins allowed.




## 2. #2 Guests Active: Guests checked in by host

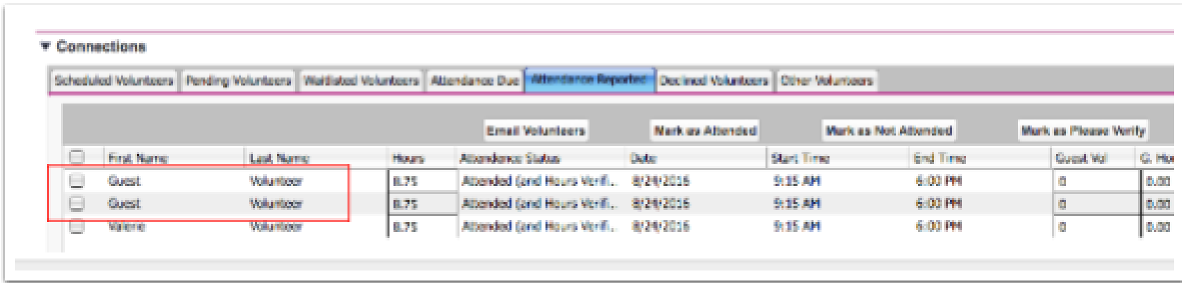
- Anyone with a confirmed connection will be asked if they have any guests when they check-in. They indicate yes or no, and how many guests.
- Guest volunteers will be added to the host's existing connection as anonymous volunteers / guests.
- Walk-ins may not check themselves in.




## 3. #3 Guests Active: Create new connections for registered volunteers. Create 'guest connection' for unregistered volunteers.

- Confirmed volunteers are checked in.
- Registered Volunteers without confirmed connections will have new connections created,
- Guests will be added as a connection for a generic contact called “Guest Volunteer”.

This option allows you to quickly check-in guests, and quickly creates connections for registered volunteers who hadn't previously signed up.   It also provides a count of anyone who walks-in but didn't already have a volunteer account. You wind up with a certain number of generic "guest" connections.

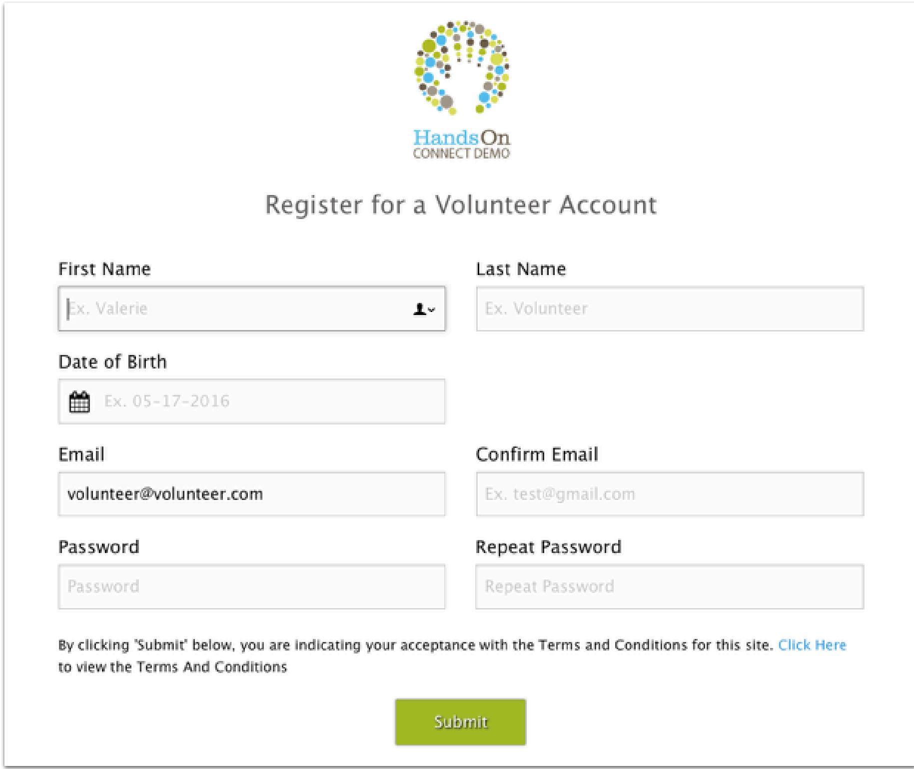



> ⚠ Note:  If you are allowing [team check-ins in the kiosk](), you cannot use guest active configuration #3.  This configuration is only available if you disable team check-in, as it counts individual volunteers without identifying whether or not they are part of a team.

# 4. #4 Guests Active: Create new connections for registered volunteers, otherwise register new volunteer and create new connection

- Confirmed volunteers are checked in.
- Registered Volunteers without confirmed connections will have new connections created,
- Guests will be asked to fill out a 'short' registration form and a contact record and connection will be created.

This is the most complete check-in solution, but requires longer for guests to check in as they must fill out a form.




- By default, The guest will be able to provide a password and an account will be created for them.
- The 'short' registration in configuration 4 bypasses any 'required' fields and custom questions or Advanced Registration System custom fields and content, that you normally ask during registration. (If you wish to require the full registration form, we recommend that you choose configuration 3, and have guests go to another device and complete your full registration form) before checkiing in at the kiosk.

# 5. Options for handling of Private (Invitation code) opportunities

You also must make a decision about how you want guests handled for private (invitation code) opportunities. (This is only necessary if you are using configurations 3 or 4 regarding guests:

It determines whether or not you want private opportunities to be visible to guests to check-in.

Option 1: Do not allow guests to check-in for private (invitation code) opportunities

Option 2: Do allow guests to see and check-in for private (invitation code) opportunities.

# Considerations when enabling guests

- When guests are active, no restrictions to opportunity sign-up are enforced
- Maximum attendance is not applied
- You should check age and any other restrictions manually, as restrictions will not be applied to guest or walk-in check-ins.
- Note: volunteers under the age of 13 cannot check-in in configuration 4. They can't complete even a short registration online under COPA law.

Next: Team Configuration.

# Team Configuration Options

The ability for teams to check-in can be enabled or disabled.

## 1. Team Check-in Disabled

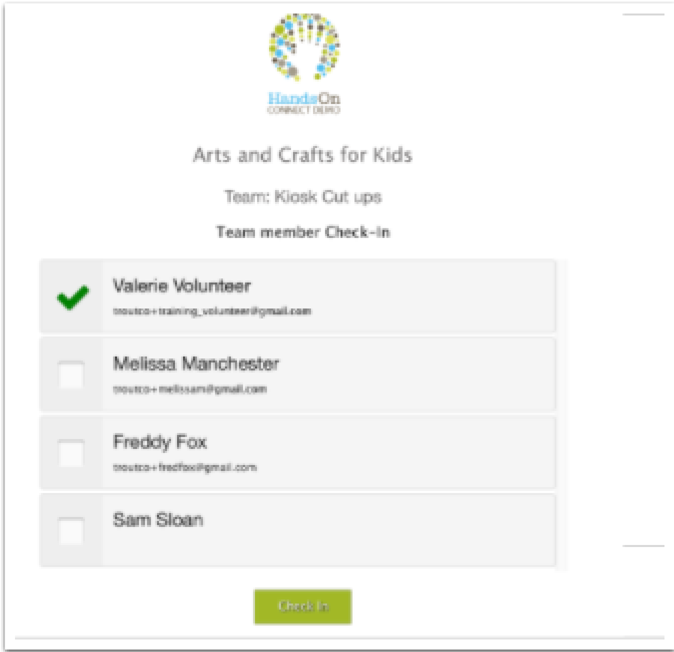
- Only team members with email addresses can be checked in
- Team member checks themselves in via their email address
- If team member has no email address, they will be treated as guest volunteers based on the guest volunteer configuration.

## 2. Team Check-in Enabled

There are two ways that team check-in can take place:

- Individual team members check themselves in, or
- The team captain handles check-in for all team members.

- The Team Captain, when checking in, have the option of checking-in their team members (along with themself). Or, they can choose to just check themselves in.)



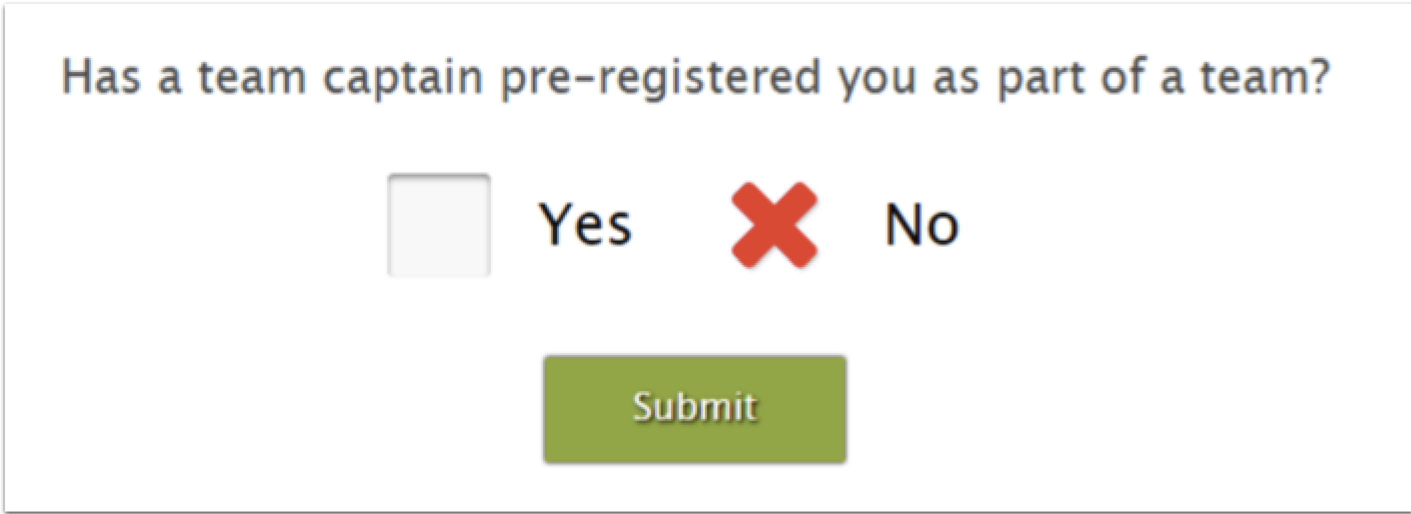

- Team members can also check themselves in individually.

It's best to have the team captain either wait and check in their entire team once they have arrived, OR to only check themselves in, and let each arriving team member check themselves in.

**Handling of team members who do not have email addresses:**

When teams are enabled, anyone checking in without a connection matching their email address,  will be asked if they belong to a team and which team they are a member of.

- A team member with a confirmed connection and an email address will be checked in immediately.
- If a team member does not have an email address they will be asked if they were pre-registered by their team captain as part of a team.  (see screenshot below).    If they answer yes, they will be asked to choose from a list of teams signed up for occurrences that day. They will then be asked for their first name and last name.
- That team will be searched for a team member who has a matching name.
- If no matching name is found, the team member will be handled based on guest configuration.   If the guest configuration allows registration of guests - then the team member with no connection (i.e. a guest team member), will be able to register and create an account, will be checked-in with a connection created, and will be added as a member of the team they said they were a part of.
- If they answer "No", they will be not be asked about teams, and proceed with the appropriate guest registration option, as defined by your guest configuration.




If teams are enabled, and guest registration (option 4) is enabled, as mentioned above, a guest will be able to join their team when they check-in, and their connection will be a team member check-in.

If you do not want guests to be able to join a team they say they are a member of, open a support ticket and we can override this setting.  In that case, only team members signed up by the team captain will be able to check in as part of a team. A guest team member will have to sign up as an individual instead of as part of a team.

[Next: Check-In / Check-Out]

# How Teams and Guest Configurations Work Together

When you enable team check-in in the kiosk AND enable Guest Check-in the kiosk, it raises the question of how team check-in works in conjunction with Guest Check-in. This will vary depending on which guest configuration option you've chosen.

For team members who already have connections, check-in will be simple and straightforward. If their team member record has an email address associated with it, they'll be checked in automatically. If they do not have an email address (as some team members do not), they'll be asked for their name and checked in if a matching connection exists for a team member with that name. However -- what happens if someone is part of a team and they do not have an existing connection. This can occur in two ways

1) Additional team members show up on the day of the event and no connection was made for them, or

2) You have allowed team captains to reserve space for unnamed team members, and they have guest spaces associated with their existing connection. (See this article for how this optional feature works and can be enabled.)

This article describes how team check-in will work if guest check-in is allowed. This varies depending on the guest configuration you have enabled for the kiosk.

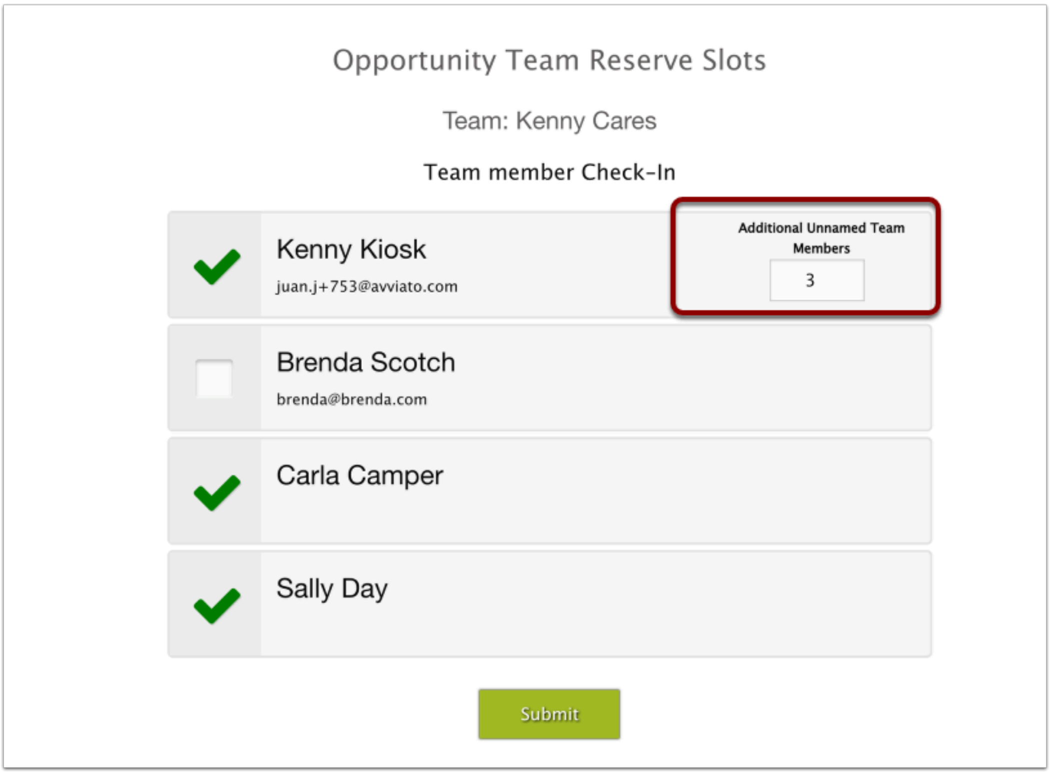
## Guest Check-in Configuration 2: Guests checked in by host

In this configuration, team captains have the option of checking in themselves, any named team members, AND the option of also indicating how many additional team members they are checking in.

If the occurrence had allowed the captain to reserve slots for unnamed team members, the current number of 'guest volunteers' will be shown and the team captain can update this number with the actual number of unnamed team members who they are checking in.

If they are only checking in themselves and named team members - this number can remain at 0. In the example below, the captain, Kenny Kiosk, is checking in Carla and Sally (who he signed up previously), not checking in Brenda (who has decided not to show up), and has 3 additional members of his team with him, who he had not previously registered or named.

Clicking on 'submit' will check in himself and add 3 guest connections to his check-in, as well as checking in Carla and Sally. (FYI: If Brenda shows up later, she'll still be able to check herself in)




# Guest Check-in Configuration 4: "Create new connections for registered volunteers, otherwise register new volunteer and create new connection"

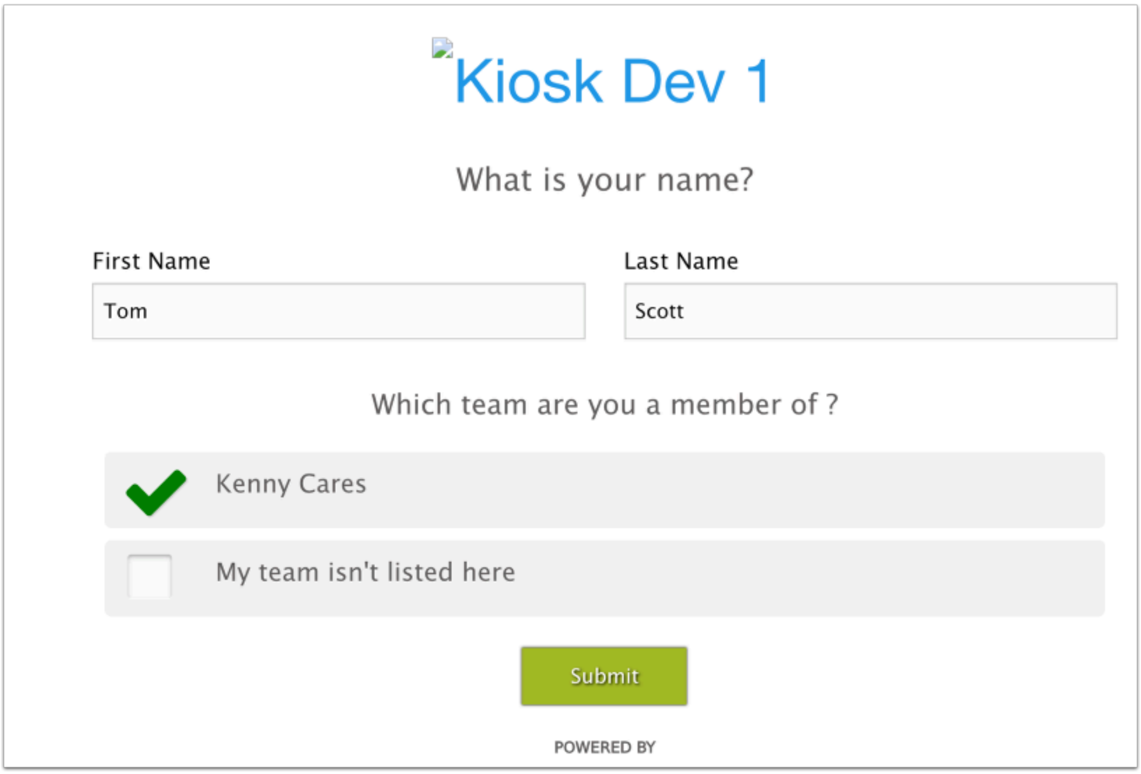
In this configuration of guest check-in - the general intent is to capture the name and email of every guest -- allowing them to create an account. So when this configuration is used in conjunction with teams, the following takes place during check-in.

1) When the team captain checks in, they can only check-in named team members they have signed up previously. Any 'guest volunteer' slots associated with their connection will be reset to 0.    Why?  Because any unnamed volunteer will be asked to check themselves in, as at that time will become a 'named volunteer'  There will be no "additional unnamed team members" in this setting - because everyone who doesn't have an existing connection will be creating an account for themselves.   By resetting the guest connections to 0, we avoid double counting the team members who attended.

2). When a volunteer who doesn't have a connection checks in, they'll first be asked which opportunity they are checking in for, they'll then be asked "Are you part of a team registered for this opportunity?"

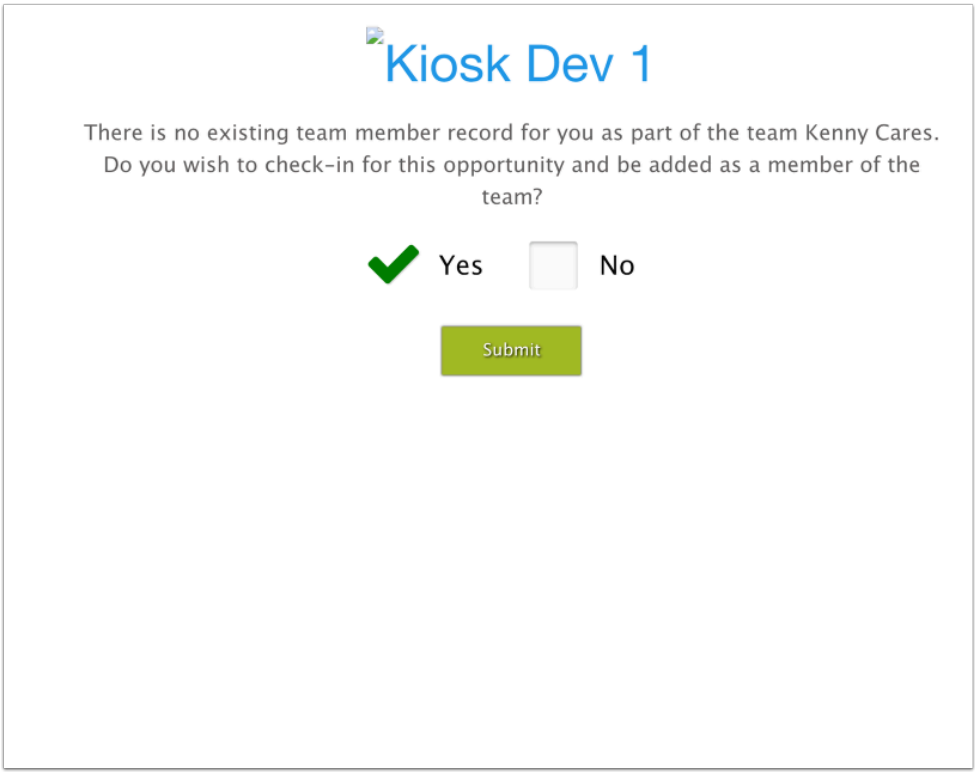

If they say no, they'll be checked in as an individual guest volunteer and create an account.

If they say yes, they'll be asked which team team they are a member of.  In this case, Tom Scott is part of the team Kenny Cares, and was not a named team member at the time the team captain signed up the team.  The team captain had reserved space for him as an 'unnamed team member".



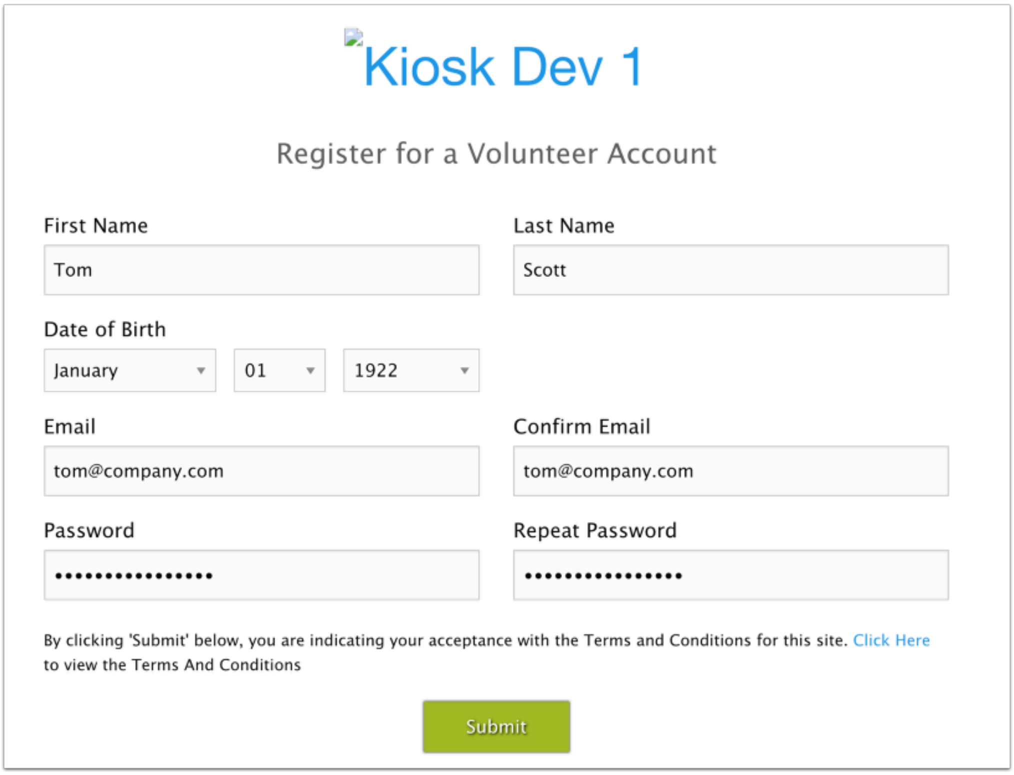
When Tom submits this, the kiosk checks to see if there is an existing connection for a team member named Tom Scott, who didn't have an email address. (Remember, team members may or may not have email address, that's why the system first checks to see if there is an existing team member with a connection named Tom Scott.)

However in this case, there isn't a connection for Tom Scott. So he'll be presented with the following screen:

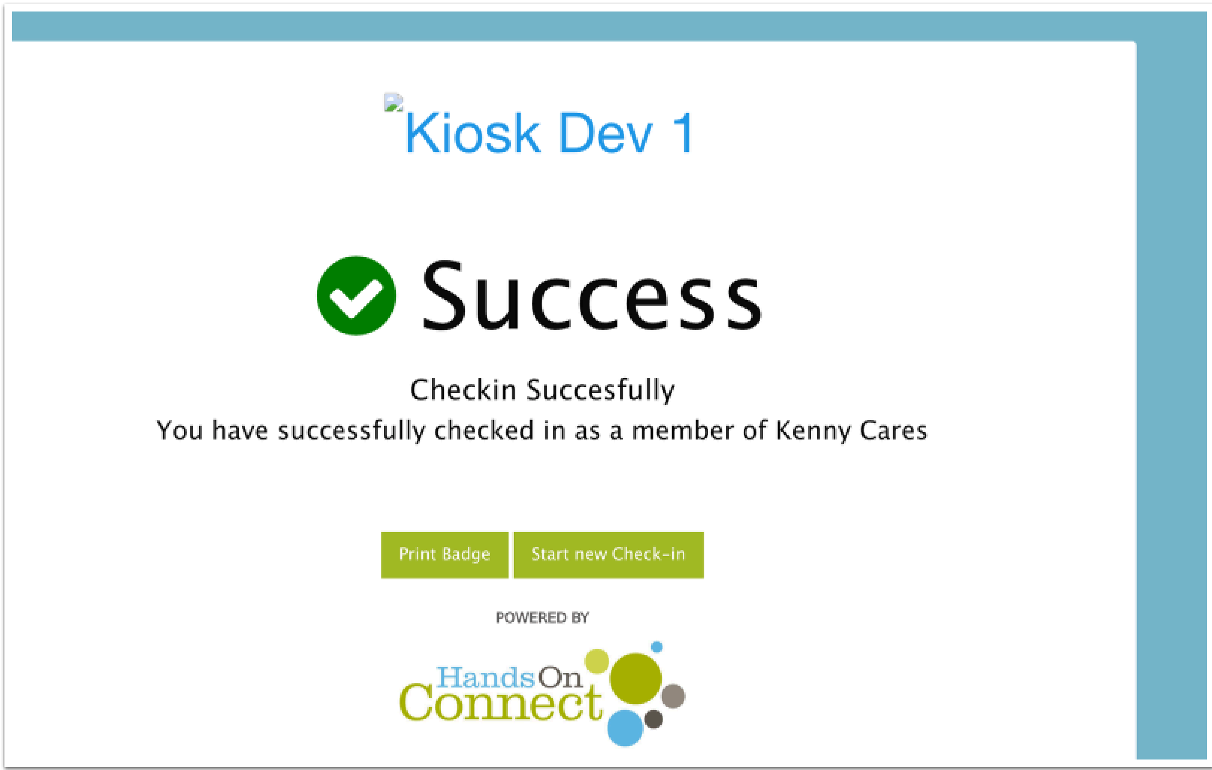



If the person says Yes to this dialog - they are taken to the same 'quick registration' page any guest would be taken to, however, in addition to creating a contact and a connection for them, a team member record is also created for them as part of that team, and their connection shows the association with the team.

The next time the team captain wishes to sign-up team members for an opportunity, they'll be able to access this person as a named member of the team.




They will now see a confirmation that they have checked in as part of their team!



For most HOC users who are allowing both team check-in and requiring guest volunteers to register, we assume that its value-added that a registering volunteer can affiliate themselves with their team. That is the default configuration of this option.

That said -- if for any reason you do not want people who say they are part of a team, to check-in as part of that team - you can request that the ability to register as part of an existing team be turned off.

In that scenario, a person who says they are part of a team and tries to check in, will receive a message saying "Sorry, you are not part of this team. Please see your team captain or opportunity leader, or sign in as an individual volunteer today rather than as a member of this team".

The volunteer will not be able to check in as part of the team, and it will be up to the team captain or the opportunity coordinator to associate that person with the team in the future.

Guest Check-in Configuration 3 is not compatible with checking in teams.   So if teams are enabled and you wish guests to be able to check-in, use configuration 2 or 4 as described above.

# Check-In Check-Out Option

For organizations wishing to track volunteer time at a more detailed level, the kiosk offers the option of checking volunteers in and out.

## 1. Check In/Out Disabled

Volunteers are checked in and marked as attended (and hours verified) and hours are updated based on the start time and end time of the occurrence.

i.e. if the connection is scheduled for 10:00 am - 11:00 am, they are credited with 1 hour of service.

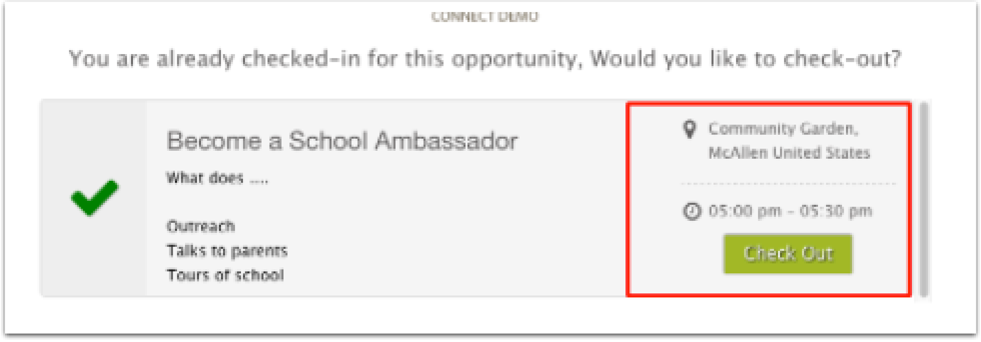
## 2. Check In/Out Enabled

**Checking In:**

- If a volunteer comes early or on time they are checked in at the start time of the occurrence. (The kiosk does not credit time for early check-in, but assumes they start when their connection is scheduled to start)
- If a volunteer comes late, they are checked in at the time they arrive (The start time of their connection is edited, to reflect the time they actually started, after the scheduled start time)

**Checking Out: (optional)**

- If a checked in volunteer enters their email in the kiosk again, they are informed they are already checked in and asked if they wish to check out.
- A volunteer who checks out before the connection end time, will have the end time of their connection updated and the 'hours sereved" will be recalculated to reflect the early check-out.
- A volunteer who checks out after the scheduled end time, will be credited with extra time in the hours-served of their connection. (The end time cannot be updated beyond the occurrence end time - but the volunteer will be credited with the extra time reflecting that they stayed beyond the scheduled end time.




- Checking out will not be applicable to anonymous guest volunteers if guest configuration 3 is selected.
- If a volunteer is signed up for multiple occurrences in one day, upon checking out they will also be asked if they wish to check-in for other opportunities they are connected to that day.

# (Optional) Tracking Actual Check-in / Check-Out times. (Time clock functionality)

As described above, the check-in kiosk does not update the connection start time to a time earlier than the scheduled start of the occurrence, and it does not update the connection end-time to a time later than the scheduled connection end-time.  But what if you want to actually track the actual arrival time of the volunteer (even if they arrive early for the scheduled connection), and know what time they actually left?

This tracking happens automatically as well, but does not influence the connection start time / end time, and it does not change the 'hours served' to reflect people arriving earlier than expected.

To see the actual check-in and check-out time, there are three optional fields that can be added to the connection page layout.

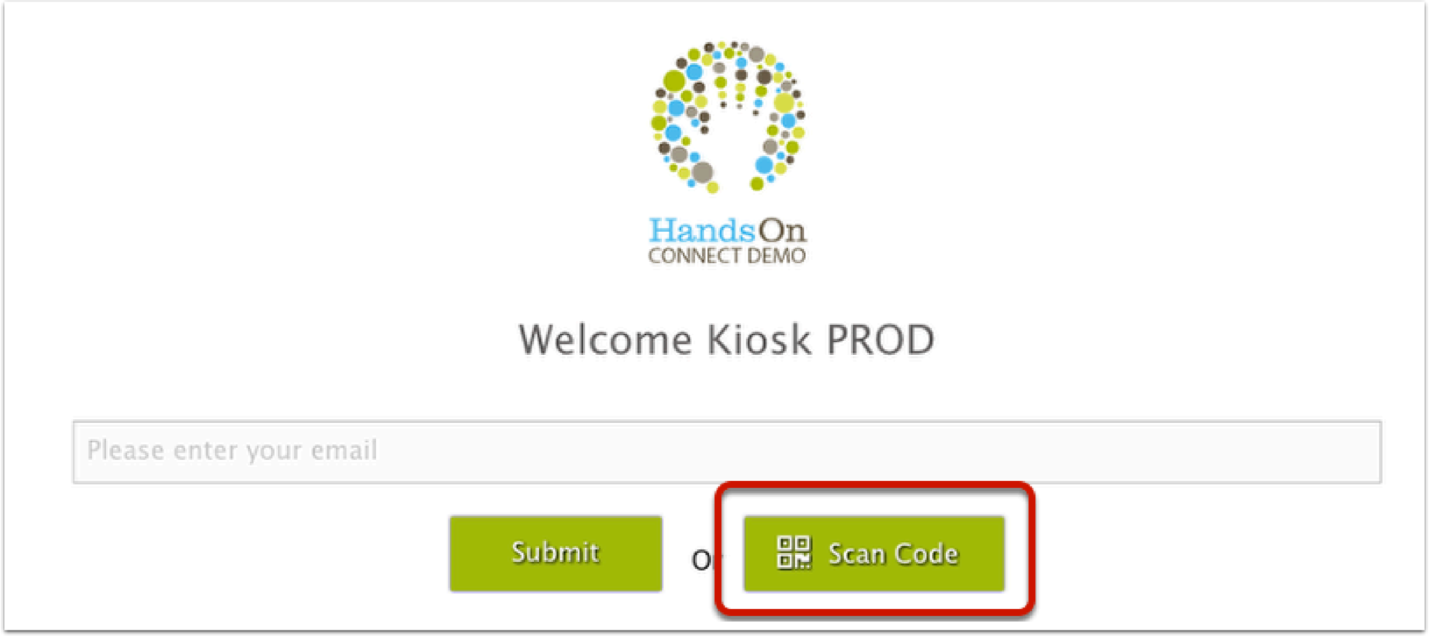
For details on adding these fields (if you wish to calculate hours served based on actual arrival and departure time (rather than the scheduled 'start' time), see this article on adding the additional fields "Check-In'  "Check-Out" and "Kiosk Hours Served"  if they are not already on your connection page layout.

Next:  Using the Check-In Kiosk to check-in volunteers

# Enabling QR Codes

The Check-In Kiosk has a configuration option which will allow the kiosk to scan QR codes that appear on an "Access Pass" that can be generated for specified occurrences and printed out by volunteers for quick check-in.

[See this article for more information on using the QR code if you have it enabled in your configuration.]


HandsOn
CONNECT DEMO
Welcome Kiosk PROD
Please enter your email
Submit
or
Scan Code

# Kiosk Activation Options

Please see the article "Using the Kiosk to Check in Volunteers" which describes the process of activating the kiosk for use each day.  The Activation Screen can be customized for you by displaying or removing several 'features' that allow the kiosk's operation to be customized by the person activating it.

Some HOC clients prefer the kiosk to be as simple as possible to activate, and don't have need to use some of the 'advanced' kiosk features.

Other HOC clients want to allow the kiosk to be configured in a variety of ways during activation.  This provides greater flexibility but can be confusing to some people.

We recommend only displaying the activation features that you know your kiosk-activators will need.

The Kiosk activation process always includes at least two options:

**Activation Code:** This is the password that is used to 'unlock' the kiosk and make it ready for volunteers to check in.

**Timezone for Today's Opportunities:** This allows the kiosk to be set to the proper time zone.

All the other activation options are strictly optional and can be displayed (and left blank), or used if needed.

We recommend, that to avoid complexity for kiosk activators, that you only display the following options IF you need to use these options.

Here are the **optional features** you can choose to display or not display when activating the kiosk:

## Location Filter

By default, the kiosk will allow checking in for any of today's occurrences, no matter what the location.    If this setting is displayed, it allows the activator to filter and only allow check-in for occurrences and connections that take place at one or more specific locations.   (Leave this filter blank to display all locations)

# Organization Filter

By default, the kiosk will allow checking in for any of today's occurrences, no matter what organization is managing the opportunity.  If this setting is displayed, it allows the activator to filter and allow check-in for occurrences and connections that are managed by one or more organizations.  (Leave this filter blank to allow check-in for all organizational occurrences).

## Save Settings After First Activation

By default, the kiosk requires you to activate ('unlock') it each day - and each day will present the options to filter by location or organization, or set a different time zone.  For this behavior, just choose **None.** The kiosk will automatically lock itself after 24 hours.

The other options you can save here are these:

- **Only Configuration (daily activation is required).** After initially activating the kiosk, the filters will be hidden and maintained. (i.e. if you are using no filters, because you want all occurrences to be displayed in the kiosk), that can be saved, and each day you'll only be asked for the activation code.  A simpler activation process if you wish to hide the filters from your kiosk activators.
- **Configuration & Activation:** With this setting, the kiosk will remain activated day after day.  This has some possible security down-side as anyone will be able to use the kiosk on this device even without someone activating it...  but if you have a permanently placed kiosk and wish it to be 'always live' - then choose to save this setting.

> Note:  This setting can be useful for an organization that wants to set up the configuration once and rarely ever have to reconfigure it.  It's also useful if you want an 'open' kiosk that does not require activation (password protection).
>
> We recommend NOT displaying this option, as the daily activation gives your kiosk greater security.  However the option is available for those organizations that prefer convenience over security.

## Disable Late Check-in (Minutes)

When left blank, volunteers can check in any time before of after the scheduled start time of their connection.  If however, you put in a number here, it represents the number of minutes, after which a volunteer is not allowed to check-in.  This is normally left blank, but if, for example you are using the kiosk for court ordered volunteers and have a requirement that they can't arrive more than 15 minutes late... then you'd populate this field with 15, and after 15 minutes they would not be able to check-in. Instead they'd see this message:.

We do not recommend displaying this option unless you need to surpress late check-ins.

Our recommendation is to only display the activation features you know you need at the present time.  If you wish to display additional options in the future, just open a support ticket if you find a need for any of the four 'optional' settings that aren't originally set up for you.

# Using the Check-In Kiosk

# Using the Kiosk to Check in Volunteers

You will be given a URL where your Kiosk is located. The URL can be customized to fit your brand if desired.

For example: Your kiosk URL might look like this:

https://efat.troutco.com/check-in

You can use one or more devices to check in volunteers for a project. These devices can include any combination of:

- Computers
- Laptops
- Tablets
- Smart Phones

How many you choose to use will depend on how many volunteers you need to check in at that project.

Here's how to activate and use the kiosk onsite:

## Share the Kiosk Activation Code with the opportunity coordinator(s)

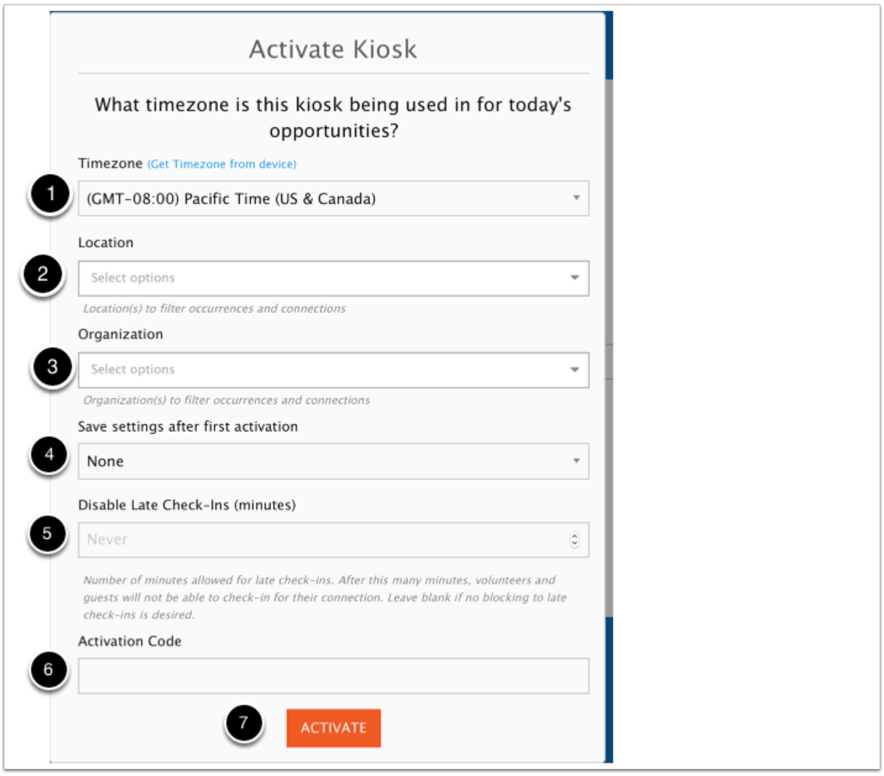
In order to use the kiosk, the person who is in charge of the device that will be used to check-in volunteers will need to know "Kiosk Activation Code"

(Note: do not share the code with the volunteers attending the project, only the person in charge of the check-in device should be given the access code.)

## Go to the Kiosk URL and activate

When you first arrive at the kiosk URL you'll see the "Activate Kiosk" pop-up. There are several options here, but all are optional except for supplying the activation code:

Note: Location, Organization, Save Settings after first activation, and disable late check-in, can either be left blank, OR we can configure your activation screen to not display these options if they are not needed.  If you wish to 'hide' any of those activation options - please open a support ticket and make the request.




**1. Timezone:** If the kiosk is being used in the same time zone as the 'affiliate time zone' there is no need to change the default time zone listed.  If you are a national organization however with projects taking place in multiple time zones, then your 'affiliate time zone' may be different than the time zone the kiosk is actually being used in (i.e. the "kiosk time zone").  In that case select the correct time zone that the kiosk is being used in.

You can do this in one of two ways:  Either select the time zone from the picklist of values, or, click on the "Get Timezone from device" link , which will automatically pick the correct time zone based on the location of your device.  (Isn't that handy?!)

**2. Location:** By default the check-in kiosk, if configured to allow guest sign-up, will display ALL occurrences taking place that day, no matter the location. Use this field if you wish to filter the available occurrences to just those taking place at one specific location. Otherwise just leave it blank! (No need to select 'all')

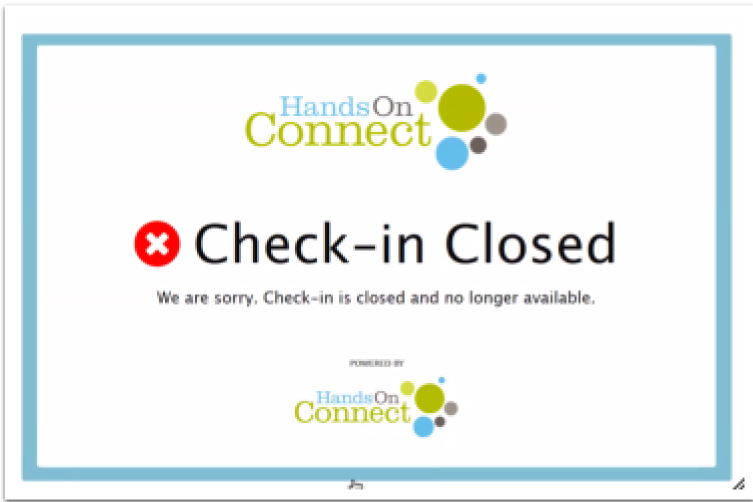
**3. Organization:** By default the check-in kiosk, if configured to allow guest sign-up, will display ALL occurrences taking place that day, no matter which organization is managing the opportunity. Use this field if you wish to filter the available occurrences to just those managed by one organization. Otherwise just leave it blank!  (No need to select 'all')

**4. Save Settings after First Activation:** By default, the kiosk requires you to activate ('unlock') it each day - and each day will present the options to filter by location or organization, or set a different time zone.  For this behavior, just choose **None.** The kiosk will automatically lock itself after 24 hours.

The other options you can save here are these:

- **Only Configuration (daily activation is required).** After initially activating the kiosk, the filters will be hidden and maintained. (i.e. if you are using no filters, because you want all occurrences to be displayed in the kiosk), that can be saved, and each day you'll only be asked for the activation code.  A simpler activation process if you wish to hide the filters from your kiosk activators.
- **Configuration & Activation:** With this setting, the kiosk will remain activated day after day.  This has some possible security down-side as anyone will be able to use the kiosk on this device even without someone activating it...  but if you have a permanently placed kiosk and wish it to be 'always live' - then choose to save this setting.

**5.  Disable Late Check-Ins (minutes).**  When left blank, volunteers can check in any time before of after the scheduled start time of their connection.  If however, you put in a number here, it represents the number of minutes, after which a volunteer is not allowed to check-in.  This is normally left blank, but if, for example you are using the kiosk for court ordered volunteers and have a requirement that they can't arrive more than 15 minutes late... then you'd populate this field with 15, and after 15 minutes they would not be able to check-in. Instead they'd see this message:.

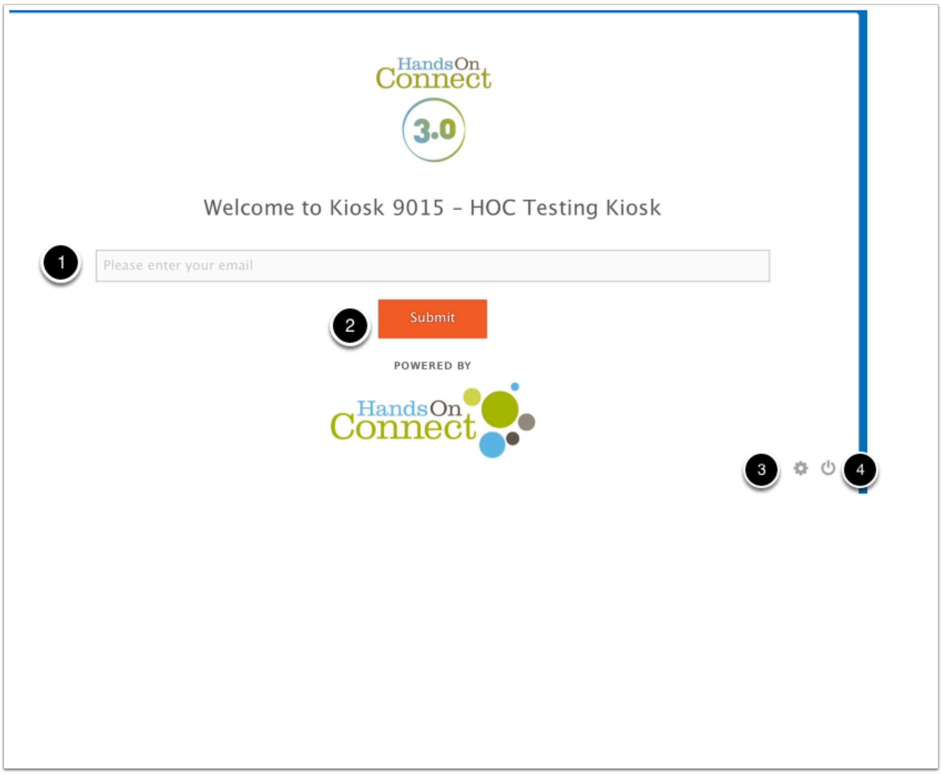



6. **Activation Code:** Enter the activation code for your affiliate's kiosk.  (Note: Activation code is the same for all your kiosks.  This just serves to ensure that the device is only unlocked by Opportunity Coordinators in charge of the project).

7.  **Activate:** Click on this to unlock the kiosk in its current configuration

## The activated kiosk screen:

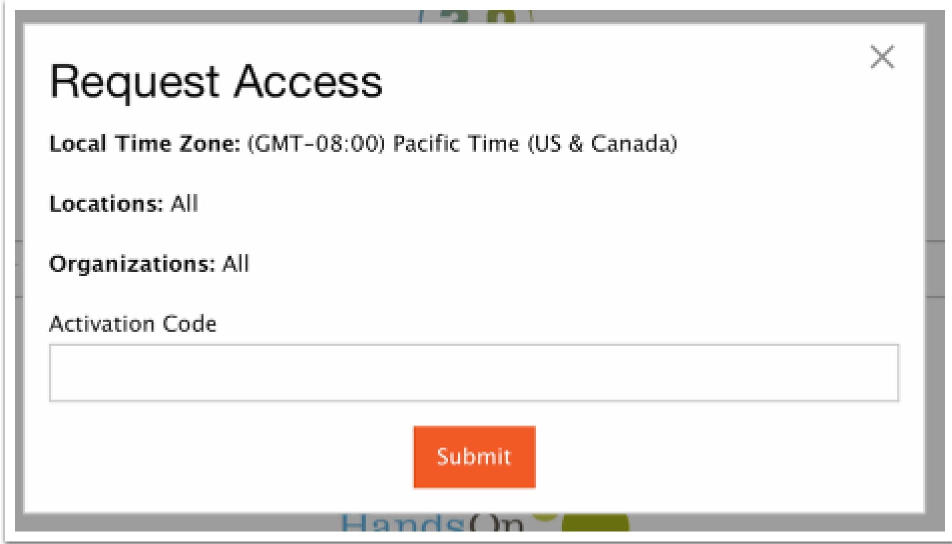
Once unlocked, your kiosk will look like this (depending on the configurations you chose for colors, welcome message, etc)  It has three elements you should be aware of:



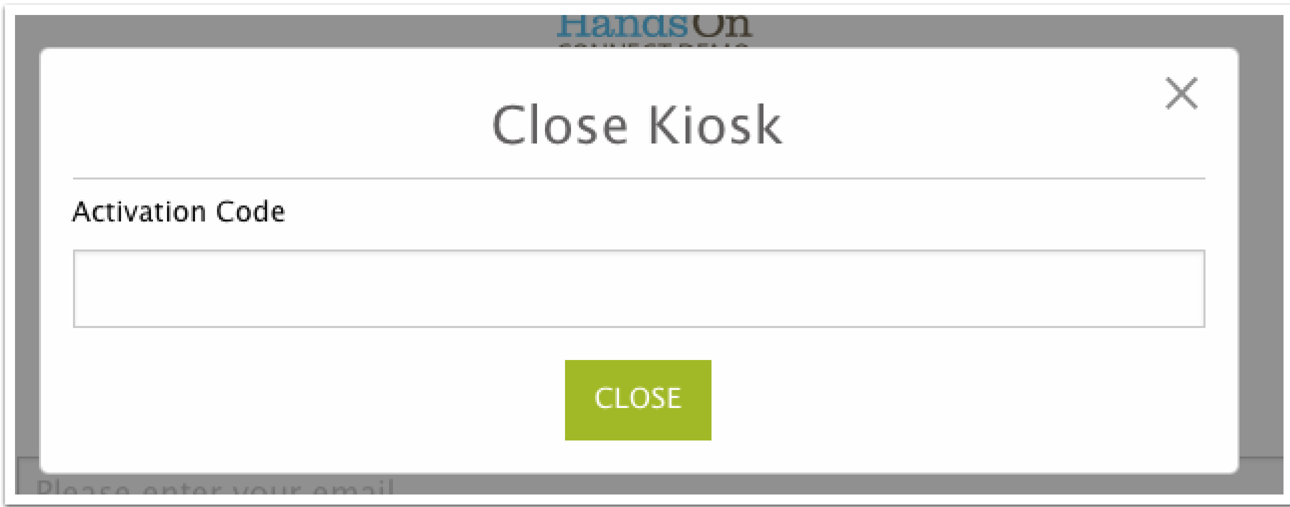

1. **Email Entry Field:** This is the only field your volunteers need to interact with when initially checking in. They enter their email address. If they have a confirmed connection they'll be checked in and presented with a success screen. Depending on your guest and team configurations they will receive additional prompts and/or messages as appropriate.

2. **Submit Button -** Click on 'submit' after entering your email address.

3. **Request Access cog -** Clicking on this will show the current configuration in the kiosk (in case you want to double check). If you've chosen to save the previous configuration daily, or to not require reentering an activation code and wish to make changes -- you can enter your activation code on this screen and reset your settings.




4**. Close Kiosk Icon** - clicking on the close kiosk icon will give you the option of locking the kiosk. If clicked on, it prompts you again for the activation code. To close or reset, enter the activation code. If a volunteer curiously clicks on either of the two small icons on the lower right and doesn't have the activation code (which of course they don't), they won't be able to close or reset the kiosk. Click on the "X" to return to the home screen without closing the kiosk. If you DO want to close or reset the kiosk, enter the activation code and click on the Close or Submit button.




## The kiosk automatically returns to the welcome page 10 seconds after check-in is complete.

Depending on your configuration, the kiosk will check in confirmed volunteers, and guest volunteers according to the configuration you chose. Volunteers will either reach a success page saying they have successfully checked-in (displaying the Success Text you specified when configuring the kiosk), or, if they are not a valid check-in (i.e. no connection exists and they don't meet your guest check-in criteria), they will see a message explaining what they need to do to complete check-in. (This may be "see the opportunity coordinator for further information" if you don't allow guests to check-in at all).

The kiosk allows approximately 10 seconds for the user to read the success or invalid check-in message, and then automatically resets to the home page so that the next volunteer can check-in. (Or, the volunteer can attempt to check-in again, if for example, they typed in the wrong email address. Whoops!)

## That's it!

Checking in is quick and easy to use! Volunteers are able to check-in early and they will still be marked as attended. They can also check-in late (up to the end-time of the occurrence).

See this article on how the kiosk operates if team check-in is enabled.

See this article on using the kiosk with check-in / check-out enabled.

See this article on having HandsOn Connect automatically mark those who did not attend as 'not attended".

TIPS:

1. The kiosk will automatically relock itself:

- After 24 hours (unless you have chosen
- If you quit your browser
- If you manually use the "Close Kiosk" icon and re-enter the activation key.

2. The kiosk uses cookies to maintain its locked state and time zone settings. (This is pretty standard, but if you experience any problems staying unlocked, check that cookies are enabled!)


HandsOn
CONNECT DEMO
Success
You have successfully checked in!
POWERED BY
HandsOn
Connect

# Automate marking 'Not Attended" Connections

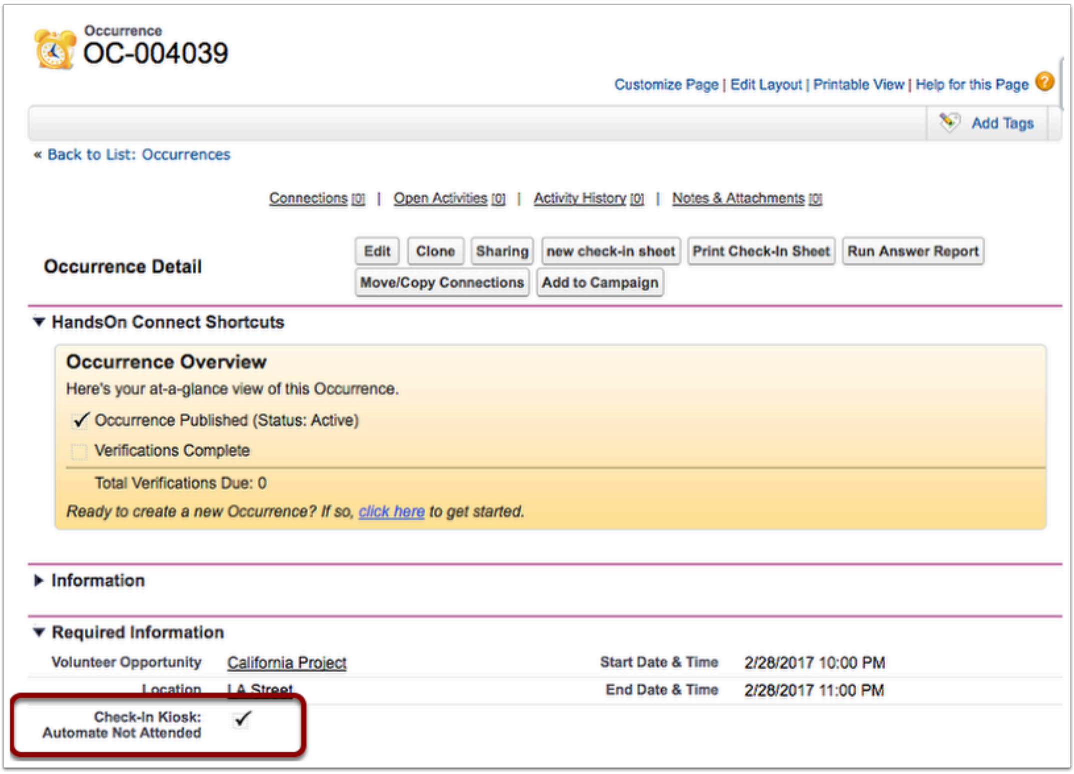
For any occurrence where you actively use the check-in kiosk, the connections of each volunteer who atended will be marked as "Attended (and hours verified"

However, the kiosk doesn't automatically know who didn't attend, and therefore your attendance for that occurrence won't be complete, since those who didn't check-in are still marked as "please verify"

You can however, configure HandsOn Connect to automate an occurrence to automatically update any connection to 'not attended".  Here's how:

## Automate Not Attended

If you have the check-in kiosk add-on configured for your organization, then an extra field has been added to the occurrence page layout.  It's called "Check-in Kiosk:  Automate Not Attended.




If you are using the check-in kiosk for this occurrence, we recommend editing the occurrence and setting the checkbox for "Check-in Kiosk: Automate Not Attended" to true.

Doing thiis will automatically, overnight, look at this occurrence, and assume that anyone not marked as attended did not attend, and automatically update the remaining 'please verify' connections for this occurrence to "not attended".

**Voilà** - the kiosk checked in who did attend, and overnight anyone who did not check in is marked as not attended.  Your attendance reporting for this occurrence is completed without you manually having to report attendance!  Fantastic!

IMPORTANT:  Do not set this value as true for occurrences that are not using the check in Kiosk.

Why?  Because if you didn't use the check-in kiosk, and the opportunity coordinator doesn't report attendance manually by 11:59 pm the day the occurrence took place, all connections in this occurrence will automatically be set to 'not attended".   You do not want that to happen if you are not using the kiosk to check-in volunteers.

Since this is not actually a 'required' field, we recommend moving this field into the "Information" section on the page layout.

Note:  This feature only works in a useful manner for connections of Date & Time Specific Opportunities.  The trigger to update any remaining 'please verify' connections to "Not attended" is executed on the day after the occurrence end date.

Since Individually Scheduled Opportunities have only a single occurrence with an end date that is often far into the future — the individually scheduled connections who remain in 'please verify' status won't be updated until the End Date of the Occurrence.  So attendance for these connections may not be updated for quite a long time.

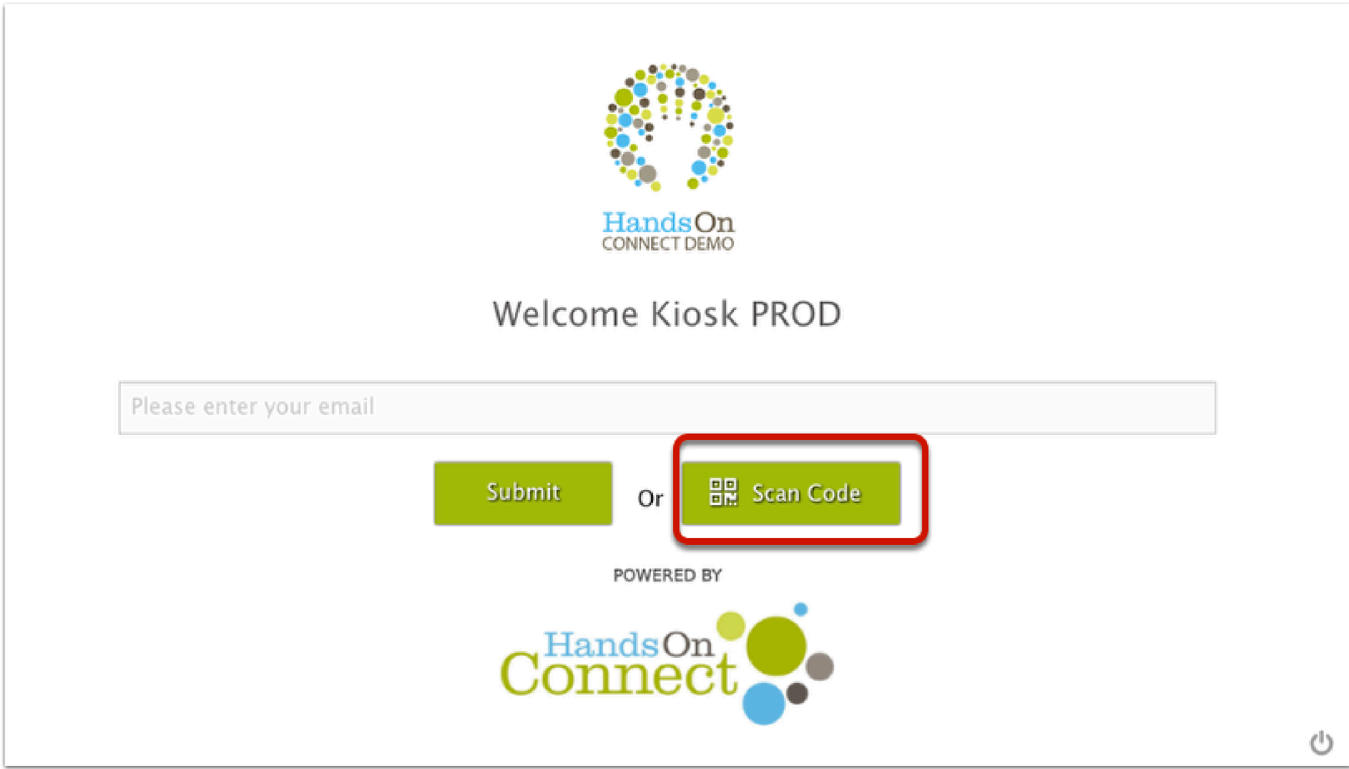
# Using QR Codes for check-in

An alternative method of checking in volunteers is through the use of a HandsOn Connect "Access Pass". The access pass contains a QR code which can be scanned as an alternative to typing in one's email address when checking in.

There are two small steps that must be taken in order to start using QR Scanning and making Access Passes available to the volunteer.

## Administrative steps necessary to enable QR Scanning

1) Open a Zendesk ticket and request the QR scanning be enabled for your check-in kiosk. Once enabled, your check-in kiosk will show a new option: "Scan Code"

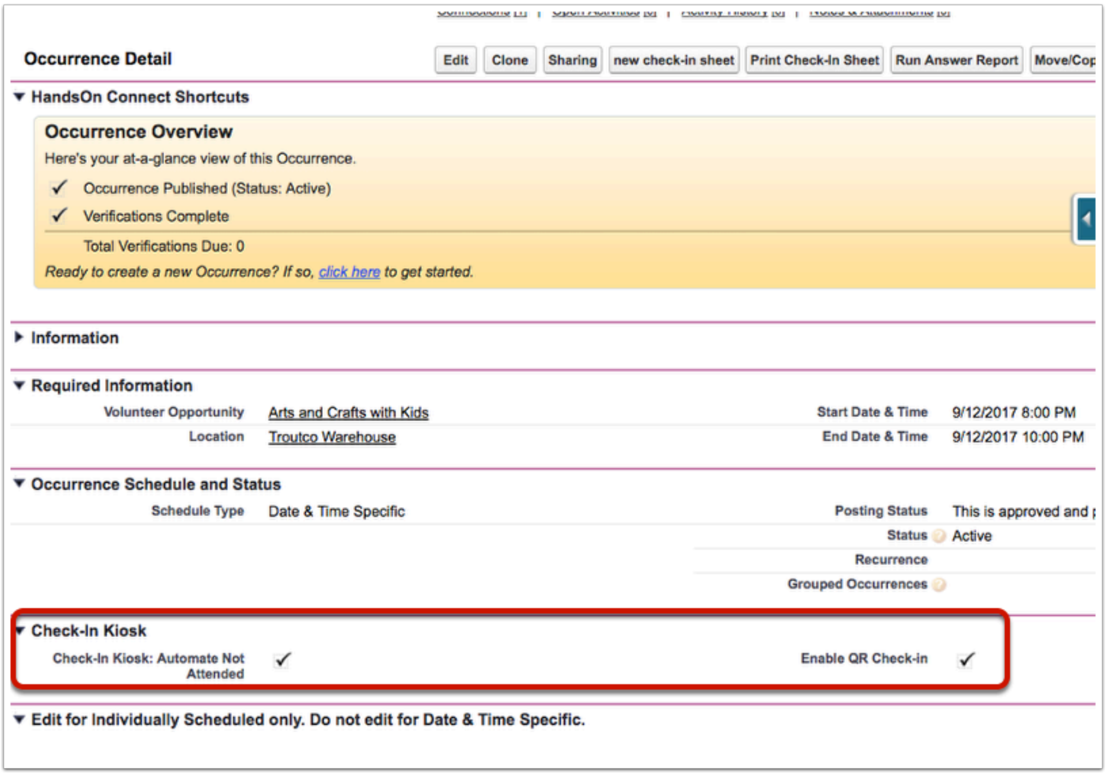



2). Go to the profiles your HandsOn Connect users are using. This is typically System Administrator and Staff (plus any custom profiles you are using). Go to Setup / Profiles and select the Occurrence Object.

Edit the profile and grant read and edit permission to the field "Enable QR Check-in" for each profile if it is not already granted. (This is necessary to make the field visible and editable for those users)

While you're in the profile, you might see some other newly added occurrence fields that aren't enabled for your profiles. This might be a good time to turn them on for future use :-)

3) Add the field "Enable QR Check-In" to the occurrence record. We recommend adding a new section "Check-In Kiosk" and placing the two kiosk related fields in this section. (See screenshot)




3) Optional: You can update confirmation emails (if desired) so that a link to the access pass will be presented when Enable QR check-In is checked for an occurrence. If you wish to do this [follow these additional steps found here:]

You'll be updating between one and five of the possible emails sent as confirmations to date and time specific opportunities, and adding conditional code that will notify volunteers that a quick pass is available. (They already will see this on the 'success page' when signing up, and in their account overview. But if you want to add to emails as well, follow the steps in the link above.

The scanning option operates only on the following devices /browsers

Mac Desktop - Current versions of Chrome or Firefox.   (note: Not compatible with Safari)

Windows Desktop - Current versions of Chrome, Firefox, Opera and Edge. (Not compatible with Internet Explorer)

Android Mobile Devices

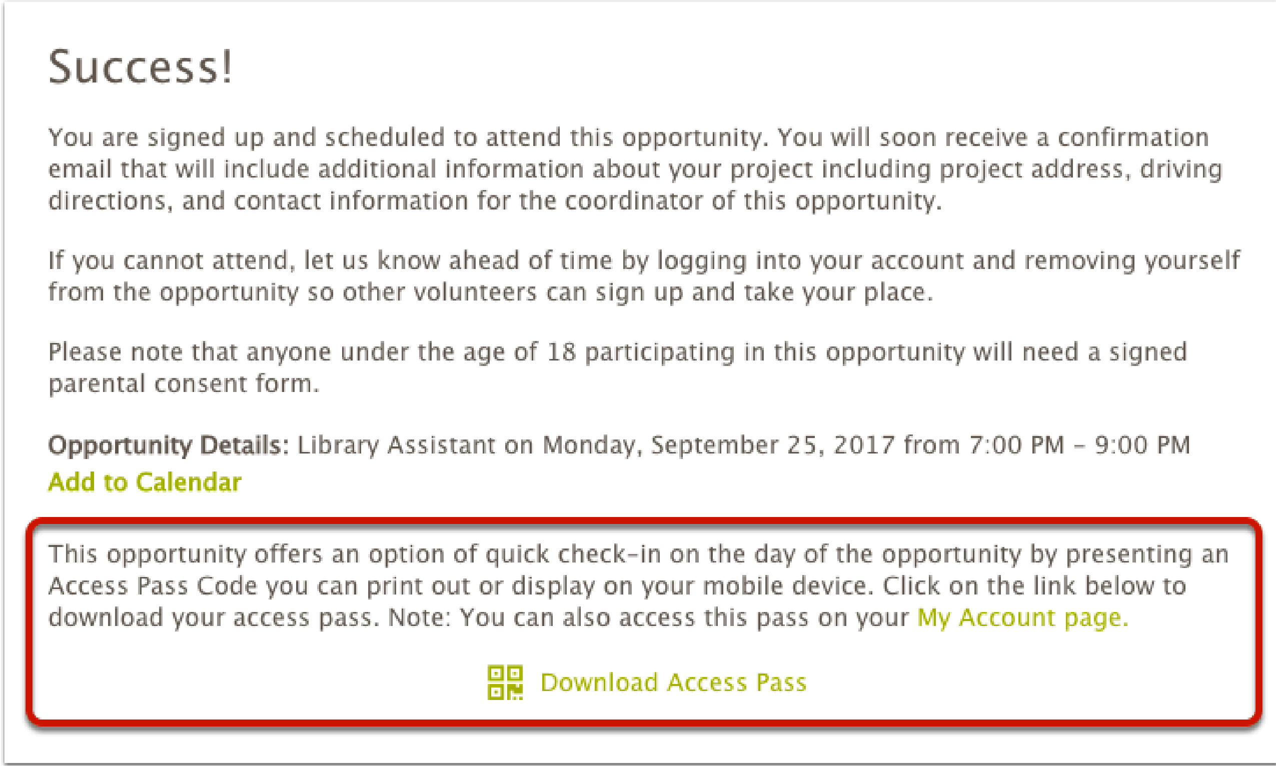
IOS Mobile Devices -- must use IOS App HandsOn Connect Admin Kiosk to scan volunteers for check-in.  IOS will not support use of browsers for QR check-in.

## Making the Access Pass accessible to your volunteers

For any occurrence in which you plan to use the check-in kiosk and make Access Passes available for scanned check-in, set the value of "Enable QR Check-In" to true for that occurrence~


You only want to enable QR check-in for occurrences where you are planning to have a check-in kiosk or mobile scanning app available to check-in volunteers.  It would be frustrating for volunteers to go to the trouble of printing an access pass if you are not planning to scan these.   Only check this field as true for occurrences where you're planning on using the kiosk and scanning QR codes.

When "Enable QR check-In" has been set to true for an occurrence - a volunteer, after signing up will see the following additional messaging on the success page:



Success!

You are signed up and scheduled to attend this opportunity. You will soon receive a confirmation email that will include additional information about your project including project address, driving directions, and contact information for the coordinator of this opportunity.

If you cannot attend, let us know ahead of time by logging into your account and removing yourself from the opportunity so other volunteers can sign up and take your place.

Please note that anyone under the age of 18 participating in this opportunity will need a signed parental consent form.

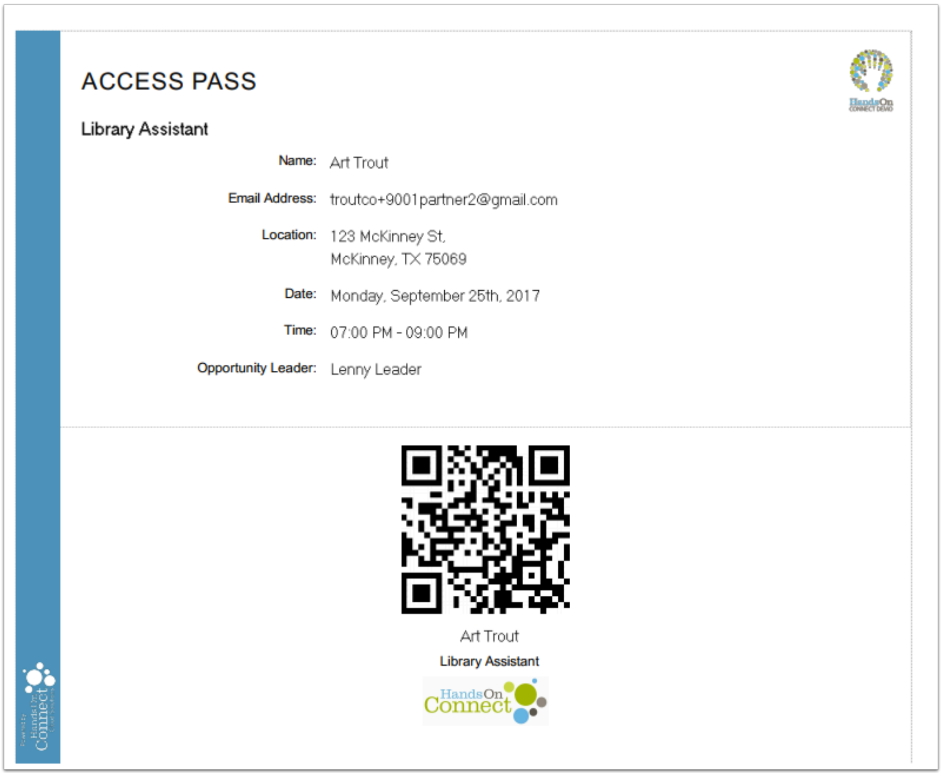
**Opportunity Details:** Library Assistant on Monday, September 25, 2017 from 7:00 PM – 9:00 PM

Add to Calendar

This opportunity offers an option of quick check-in on the day of the opportunity by presenting an Access Pass Code you can print out or display on your mobile device. Click on the link below to download your access pass. Note: You can also access this pass on your My Account page.

Download Access Pass

Clicking on "Download Access Pass" will present an access pass .pdf which can be printed out and presented for scanning during the check-in process:



ACCESS PASS

Library Assistant

Name: Art Trout

Email Address: troutco+9001partner2@gmail.com

Location: 123 McKinney St,
McKinney, TX 75069

Date: Monday, September 25th, 2017

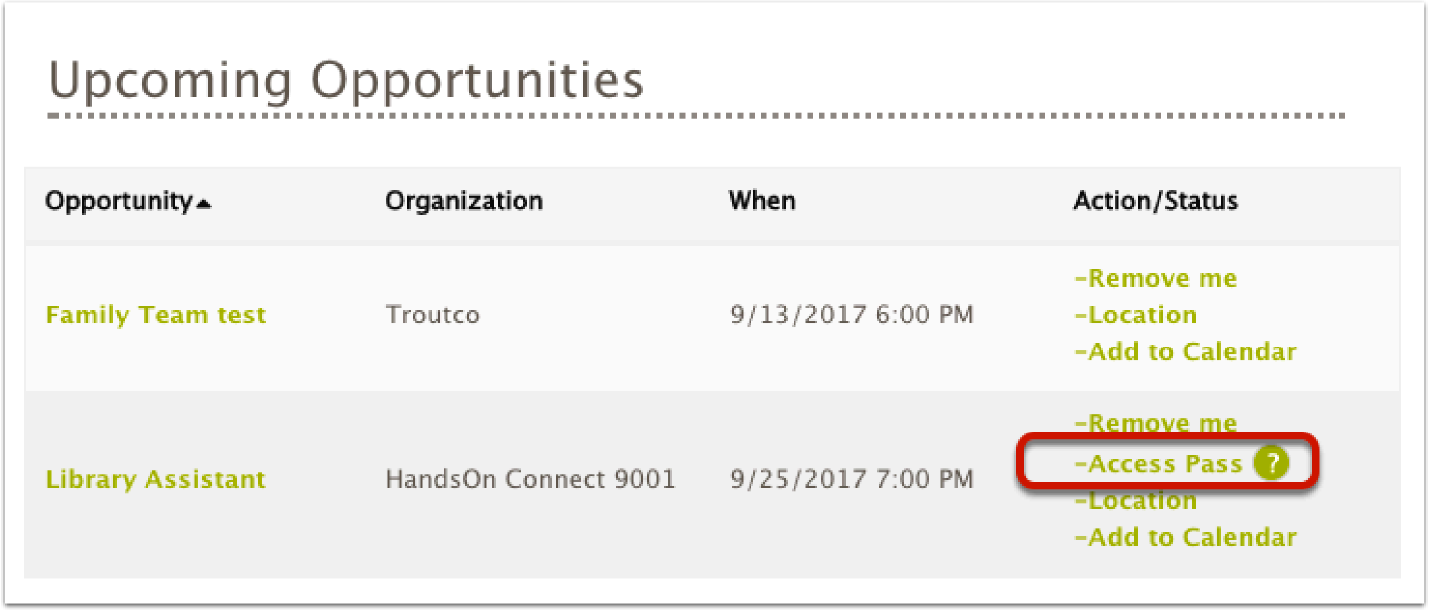
Time: 07:00 PM - 09:00 PM

Opportunity Leader: Lenny Leader

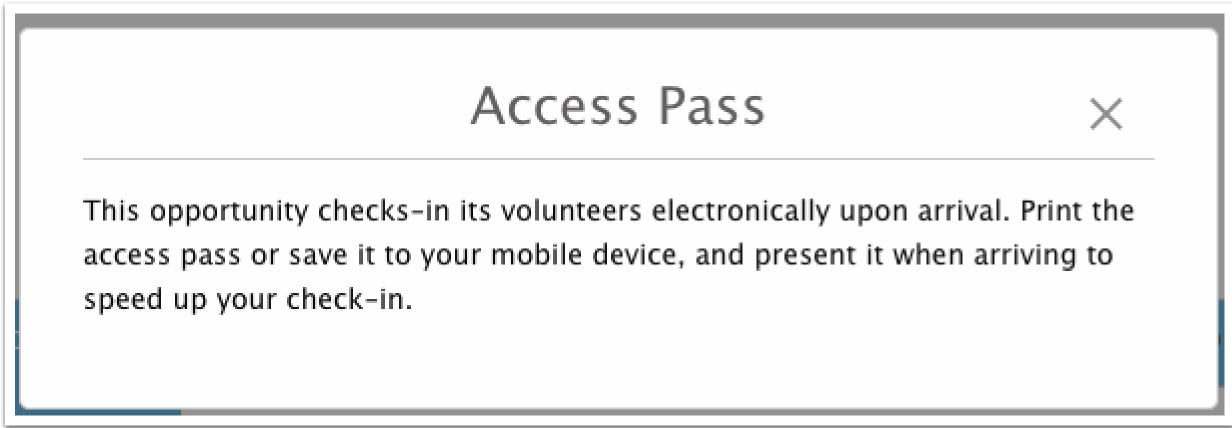
Art Trout

Library Assistant

The access pass will also be accessible at any time from the "My Account Page"




The help button presents the following help screen to explain what the access pass is for:



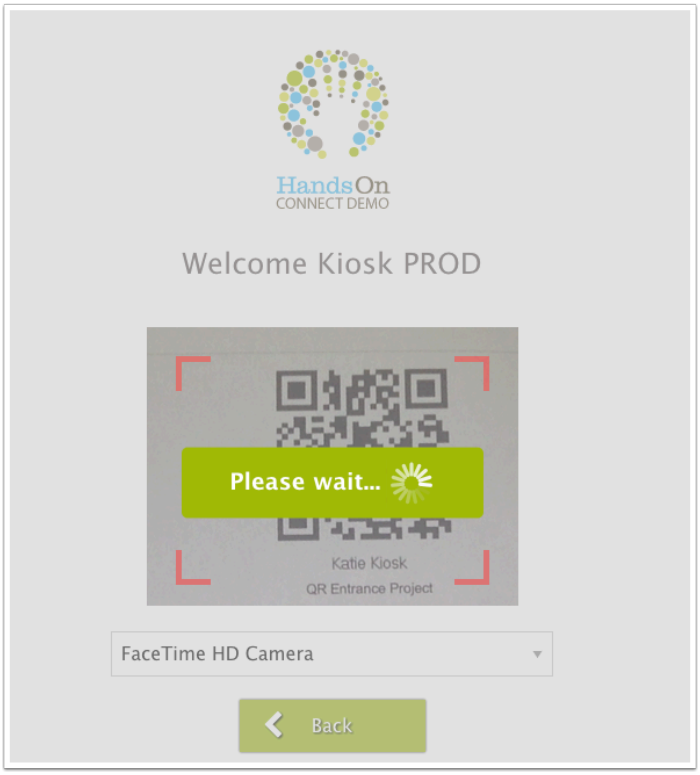

Clicking on Access Pass here also presents the access pass and its QR code, which can be printed or downloaded.

## Checking in volunteers with Access Passes:

**Computer or Laptop:**

To scan a QR code with a computer or laptop you'll need to have a laptop / computer with a built in camera.   The volunteer (or whoever is checking in volunteer), just needs to click on the "Scan Code" button.  You may have to grant your PC permission to use the camera the first time you use it.

After clicking on the Scan Code button you'll be presented with a target area to line up your QR code for scanning (as well as a choice of which camera to use).   Place the QR code in the red box area and it will be scanned, thereby checking the volunteer in without their having to type their email address:

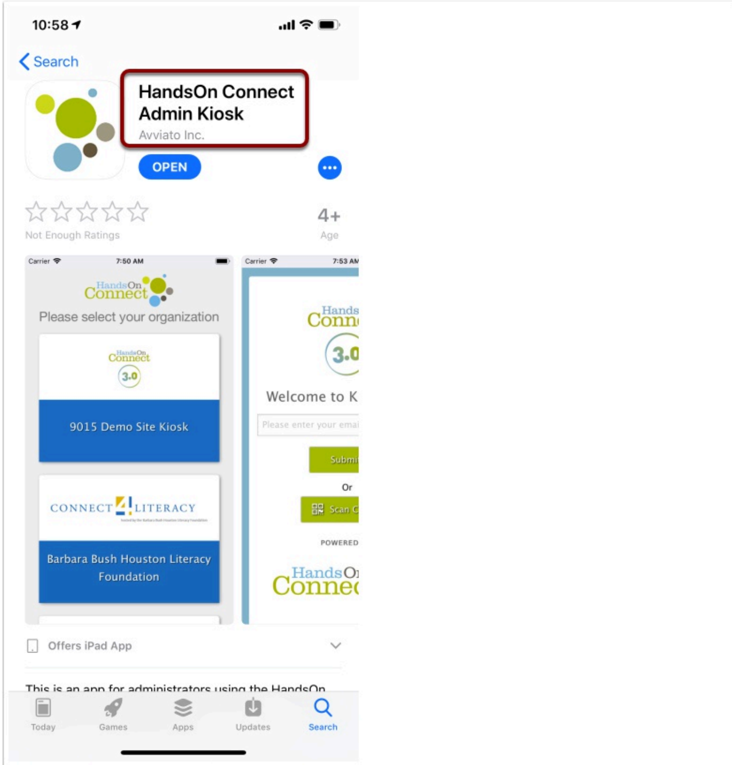



**Phone or Tablet**:

Android phones and tablets can use the check-in kiosk directly by logging into your kiosk with the built in browser on these devices.

IOS users (apple phones and ipads) can not use their browsers to check-in with the kiosk (This is due to limitations for camera access in IOS browsers).

If you are using an iphone or ipad to check-in volunteers and wish to be able to scan QR codes, you must first use the **HandsOn Connect Admin Kiosk** app which you can download from the IOS app store:




To use the app -- launch it, and select your organization from the list of organizations with a HandsOn Connect check-in kiosk. Once you've selected your organization, you'll be prompted to activate the kiosk using the same activation code you normally use on a browser.

Once activated -- the app will function in the same way as the kiosk operates in a browser - but will enable the QR option. If the 'Scan Code" option is selected, it will activate the IOS device camera to scan the QR code.

⚠ Please be aware of the following limitations to the use of QR codes:

- At the present time, QR codes only operate for checking in a volunteer. If you have enabled check-in / check-out, the QR code does not presently check out a volunteer. Presenting the QR code again will change the check-in time for the volunteer. (This will be addressed in a future release and it will be possible to use the QR code / Access Pass to check-out for an opportunity. For now, if you wish volunteers to check-out - they should type their email address into the kiosk when they are ready to check-out.
- QR codes are only available for volunteers with existing connections. Guests will have to check-in by entering their email address in the kiosk.
- Team members - if they were registered by their team captain and do not have an active account in HandsOn Connect, will not have access passes either. They will have to check-in by entering their email address into the kiosk. (Team Captains will not receive multiple access passes for all their team members.)

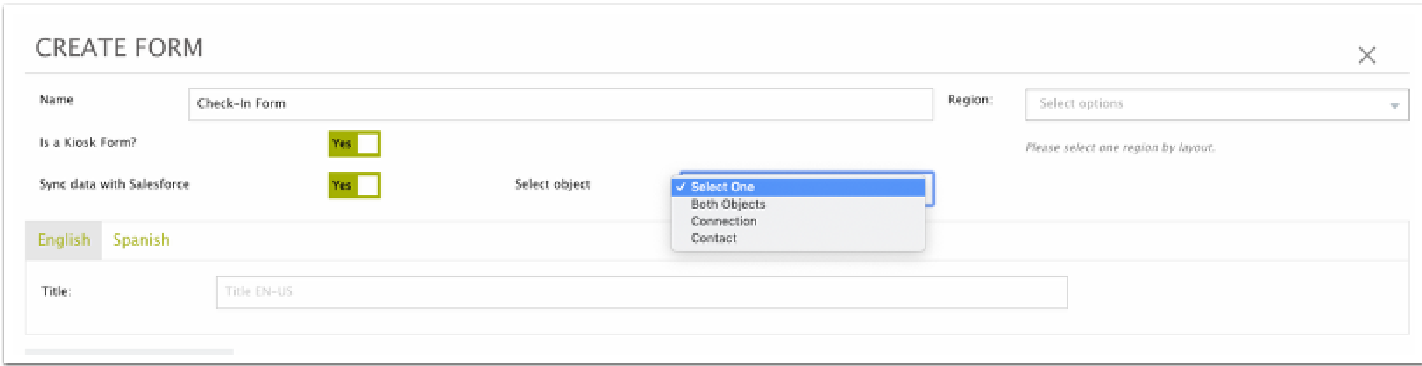
# Kiosk Advanced Options and Future Development

# Getting additional information during check-in and/or check-out

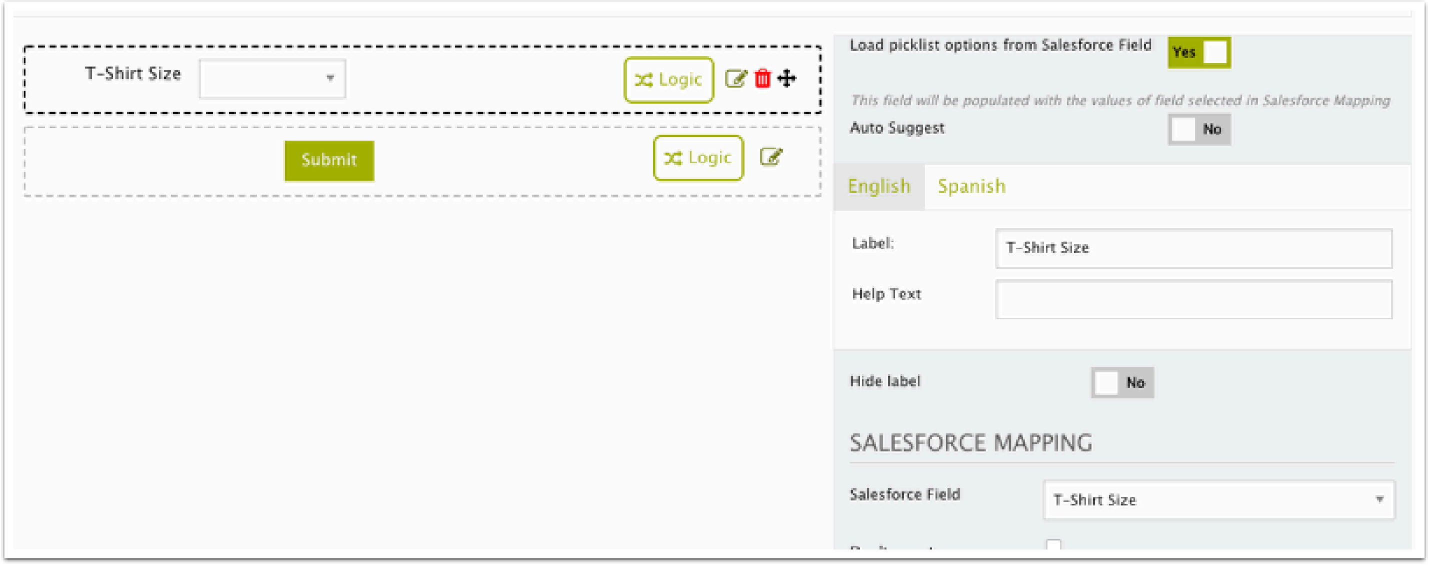
The check-in kiosk was designed to make checking in or out as quick and easy as possible - however in some circumstances kiosk administrators may want to ask additional information as part of the process of checking in or checking out. (For example: During check-out you might ask the volunteer for a rating on the project, or for an impact measurement of some kind. Here's how to add an additional form page to the check-in kiosk:

## 1) Create a form

When creating a form, select YES for the field "Is a Kiosk Form?" Then give you form a name, and choose whether you wish to populate info to the contact record or the connection record of the volunteer checking in. (or both!)




Add the fields you wish to populate to the form. In the example below, I've added a custom field "T-Shirt Size" to the contact record, and will ask this when the volunteer checks-in (so I can keep a record of their T-Shirt Size for future reference.




Save your Form.

[See these articles for more information on creating custom forms](#).

## 2) Open a support ticket and request that your form(s) be linked to your check-in kiosk

Give the name of the form you want applied to check-in, and the name of the form you want applied to check-out. (You can have one or the other or both as desired).

The support staff will then attach the designated forms to your check-in and/or check-out workflows in your check-in kiosk.

1) Avoid making your forms too long or require too much text. The intent of the kiosk is to make check-in and check-out quick and easy. You don't want to tie up a volunteer with a lot of questions to answers and risk slowing down the process.

2) Be aware that your check-in or check-out form applies to ALL volunteer opportunities that people check-in or out for. You can't ask for different information for each volunteer opportunity - this is a universal form for all check-ins or check-outs.

3) When a team captain checks in themselves and additional team members - only the team captain's connection or contact will be updated with the form data. Only if the team members check themselves in individually will you capture information on each of the team members.

# Features in development for future kiosk releases

## Beta Features that are currently available

- Support for printing badges / name tags after check-in.   (Requires an available badge printer

## Possible future development for the kiosk

As of January, 2020 the following features are under evaluation and consideration for future updates to the kiosk:

- The ability to check in "guest" volunteers in for Individually Scheduled Opportunities.  (Currently the kiosk  supports check-ins for **existing**, confirmed connections to Individually Scheduled Opportunities.
- A companion app for volunteers that will allow them to check themselves in based on geo-location.