ACS People Suite – Checkpoint

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Checkpoint

Checkpoint is a flexible and intelligent check-in program that you can customize to fit your ministry. It's designed to be at the core of your security plan. Newcomers and members alike will feel more at ease knowing that child security is a top priority at your church.

We recommend that you first write out how your check-in system would work, and then use Checkpoint to implement it. With that in mind, the Planning and Preparation section offers general guidelines to design a check-in system with Checkpoint. Then, the Setting Up Checkpoint, Checking In and Out, and Reports and Attendance sections offer instructions on how to fulfill your check-in goals.

Checkpoint also keeps track of daily activities that lets you monitor and report on attendance. Some highlights include:

- Enhanced security with identifying badges
- Quick and easy check-in streamlined and simplified attendance
- Visual appeal

Checkpoint Implementation Guide

With Checkpoint your organization will know where visiting children are at any time, and especially in case of an emergency. Parents check-in their kids at a workstation (either a manned computer or an unmanned kiosk). Checkpoint handles the rest. This guide is intended to help you understand Checkpoint's check-in system and how its can features fit in with your safety and security plan. It can also help your leadership and staff decide when and how to integrate Checkpoint for the first time.

We recommend that you design a check-in system and then use Checkpoint to adapt to that system. With that in mind, review the sections Check-in Safety and Security and Designing a Check-in System that covers generic check-in information.If you've already created a check-in system, you can skip ahead to Check-in Methods

Disclosure

Some suggestions and recommendations are for informational purposes only. This guide is not intended to provide legal or risk management advice, nor are any suggested checklists or action plans intended to include or address all possible risk management exposures or solutions.

Designing a Check-in System

Checkpoint is a flexible program that can handle the check-in requirements of most organizations. Before you begin using Checkpoint, you should design your check-in system. A check-in system is the complete and comprehensive process that makes it possible for all people to check-in and out of your buildings as they arrive and leave. Designing a check-in system includes analyzing staff requirements, building modifications, budget allowances, volunteers training, and what do to in the case of an emergency.

As you design your check-in system, keep the following in mind:

- **Parent identification —** Will you require an ID from parents to pick up a child? How will you handle a lost security badge? How will you handle custody disputes?
- **Locating parents in an emergency —** Will you have a central location for parents to report when paged, or will individual classrooms handle paging?
- **Emergency evacuation —** In case of an emergency, where will classes go ? How will parents be notified? How will you handle parent pick-up?
- **Check-in stations —** Will you use self check-in and assisted check-in? Will check-in stations be dispersed throughout the facility or in a central location?
- **Congregational growth —** How well does your plan scale?

Check-in Safety and Security

The safety and security of your members and guests is your first priority. Make sure you have systems and processes in place that protect your organization from legal incidents. Any check-in system should be part of a larger safety and security plan that includes:

Classroom Safety

Many safety problems in facilities arise because potential hazards go unnoticed. To ensure that you are prepared in the event of an emergency, consider each of the following:

- Make sure first aid kits are available and easily accessible.
- Make sure phones are easily accessible and emergency numbers are clearly posted.
- Inspect classrooms for potential dangers, such as exposed electrical outlets.
- Avoid letting adults into the classrooms. Drop-off and pick-up should occur at the doorway. Observe adult-to-child ratios and room capacity limits. Check with your state and local government agencies for recommendations and regulations concerning these areas.

If possible, have a separate children's wing with limited adult access. It provides better security and centralized check-in.

Fire Safety

There is always the possibility of a fire on your campus. Danger can be minimized by ensuring that:

- Fire extinguishers are readily available and their inspections are current.
- Evacuation plans are posted throughout the campus, especially in children's classrooms.
- Your staff members, volunteers, and leaders have been trained on the evacuation plan and their roles in case of a fire.
- Emergency exits are clearly marked and pass their battery backup test.
- Your staff knows where the main fire alarm panel is located and understands the alarm codes.
- You have your data backed up and a copy stored at an off-site location.

Screen Employees and Volunteers

Protecting children is a primary concern for parents and churches. Screen your workers and keep organized, up-to-date information on all volunteer and paid workers who serve in your congregation.

Here are some suggestions to consider when screening workers:

- Don't allow any volunteer to be involved in nursery, children, or youth programs until they have been associated with your congregation for at least six months.
- Create a screening application that includes at least two references and verify those references before approving the applicant for volunteer work.
- Investigate applicants' prior volunteer involvement.
- Choose a reliable criminal background check service and screen all volunteers and staff on a regular basis.

Supervise and Train Workers

Make sure to have standard procedures in place to ensure that workers are properly trained and supervised. Workers need to understand what procedures they should follow when they're trained. If possible, it's a good idea to offer refresher courses to go over procedures again. Create policies and procedures for your congregation that cover these areas. Below are some suggestions to think about. By doing this, you'll be helping to protect your workers and the children who attend your organization's activities.

- Consider assigning a roaming adult who can drop-in on child classes and activities. They can also keep an eye on any unsupervised children in the hallways.
- Employ the two-adult rule for all classes or events where children are involved. There must be two adults over the age of 18, present in the room at all times. Never leave one adult alone in a room with a child(ren).
- A restroom policy is important. This policy states how workers will supervise children when they have to use the restroom.
- Provide doorways with glass windows so that outsiders can see into all classrooms.
- Make sure volunteers clearly understand the check-out process. If you print security badges, make sure workers always compare the child's badge with the parent's badge.
- Staff should be familiar with state and federal laws, as well as your own policies, regarding registered sex offenders and what to do if one comes on campus.
- Make sure all staff (not just the children's ministry staff) are familiar with your procedures so that everyone can respond quickly and effectively should a crisis arise.

If you already have policies in place, review them on a regular basis and update them as necessary.

Security with Checkpoint

Using a registration method that ensures the security of every child helps keep kids safe, parents content, and your congregation protected. An ideal system provides an organized approach to checking children in and out and a way to identify parents with confidence when they pick up their children.

Checkpoint Planning and Preparation

We've worked with organizations during their initial set up of Checkpoint, and gathered feedback from others who have used Checkpoint for many years. Through these experiences, we've compiled a series of suggestions to help make your implementation of Checkpoint a success.

1) Plan

Keep the following in mind as you develop your plan:

- Review insurance and legal requirements that could affect your implementation.
- Ask for input and suggestions from staff members and lay leaders in the children's ministry area.
- Survey your existing facilities and determine if you need to make any changes.
- Consider hiring an ACS Implementation consultant. They'll visit your campus, help develop and implement your Checkpoint plan.

As you develop your plan, make sure it fits your budget and you can implement it in the expected time frame.

2) Train

The key to implementing a successful security check-in is by training your ministry leaders, teachers, coordinators, and volunteers. Remember, security requires more effort and planning beyond what technology can supply. As you implement Checkpoint, make sure:

- Greeters are well-trained on children's ministry, including registration and check-in of equipment, classroom locations, centralized visitor location, volunteer and staff names, and your organization's emergency policy.
- Ministry leaders are trained how to use software tools to identify, qualify, and screen volunteers to match the right people with the right positions.
- Teachers and classroom volunteers understand drop-off and pick-up procedures, the use of security badges, and emergency procedures.
- Hall monitors, ushers, and parking lot attendants know what their specific roles are in case of an emergency.
- Volunteers understand and follow the established security protocols.

3) Communicate

Once your child and youth ministries' security check-ins are in place, make sure to tell your congregation about it. Share how it works in the weekly bulletin, post it on your website, and encourage group leaders to share it with their small groups. You can even announce it from the pulpit. Continue to remind the congregation that child safety is at stake and worth any perceived inconveniences.

4) Conduct Test Runs

It's better to discover any problems with the check-in process before the crowd arrives on Sunday morning. Invite parents participate in some test runs during other times of the week.

You may find that some children have never been entered into your People database or they weren't added to the correct family. You might also discover duplicate records. It's best if these kinds of errors are corrected in ACS People before proceeding with Checkpoint setup. Then, meet with leaders and volunteers to get their feedback to resolve any issues. You may also want to meet with this same group after the first or second live runs. Your goal is to get everyone comfortable before Checkpoint is fully launched.

5) Implement in Stages

Another way to minimize problems and overcome obstacles is to implement Checkpoint in stages.

In phase 1, implement the check-in system for your infants, toddlers, and preschoolers. It's a good idea to start with this age group because they're the most vulnerable and their parents are the usually the most receptive to the need for a check-in system. Once you've implemented check-in for the youngest children in phase 1, move to the grade school kids in phase 2, and the youth in phase 3.

6) Plan for Future Growth

Once Checkpoint is in place, you must maintain it. This includes planning for printer and replacing other hardware items, and budgeting for labels and new check-in stations as your congregation grows.

As your congregation grows, plan for changes that will affect your people and processes. You'll likely need to adjust how you use Checkpoint based on how things change in your organization. This includes changes that may occur with systems and processes you have in place and how you train new volunteers. You'll also need to monitor your staff members, leaders, and volunteers to make sure the policies and procedures are followed.

Check-in Tools

Several software options and check-in tools are available to help you customize Checkpoint. When you're setting up Checkpoint, think about how your members, volunteers, and staff will identify people as they check-in. If you choose to use badges and pagers, it may influence how you set up and use the program.

Locate Records at Check-in

In Checkpoint, members must enter some initial identifying information to locate their records before checking in. The most common methods to access records include:

- Entering all or part of a name
- Entering the last four digits of a phone number
- Scanning a bar code
- Entering an assigned pager number
- Scanning a fingerprint

Pagers

It's important to know how to reach parents or guardians if a problem occurs while a child is in a class or daycare. So, when we refer to using pagers, we're referring to the different ways to contact parents. Many organizations may not have the money or the desire to buy a set of pagers for the congregation to use, while others may find that electronic pagers are the best solution.

There are several ways you can implement paging methods with your congregation: Vibrating Pagers, Flash Cards, Cell Phones, or using a combination of those methods.

Vibrating Pagers

You can buy electronic pagers and distribute them when parents check in. When parents return to pick up their children, they return the pagers.

At manned check-in stations, the check-in attendant can hand out pagers. At unmanned check-in stations, you can leave a basket of pagers that are labeled with the pager numbers next to the station. When a member checks in, they can grab a pager from the basket and enter the pager number into Checkpoint. If you use electronic pagers, you can set them to vibrate to reduce noise disturbance during the service.

Flash Cards

A less expensive way to communicate with members is to write a number on an index card, give the card to the parent, and record it to use if needed. This method is best used in conjunction with screen projectors. If the child care provider needs to page a parent, they can notify the projectionist to flash the index card number on the screen. Without disrupting the service, the parent knows to go to the predetermined location to check on their child.

Cell Phones

Parents or guardians can provide their cell phone number, so the care giver can call or send a text message to them. Be sure that the parent is given the phone number that the care giver will use to call so that the parent will know how to respond. Your congregation can also buy prepaid cell phones to hand out to parents if they don't have cell phones. If parents forget to turn in the cell phone when they pick up their children, you can call the cell phone and ask them to return it.

Make sure that parents and guardians set their cell phones to vibrate to reduce noise disturbance during the service.

Using Pagers with Checkpoint

You can assign and store family pager numbers in Checkpoint. When assigning pager numbers, keep in mind the following:

- You can set Checkpoint to require pager numbers.
- Pager numbers are assigned by family, not individual.

- Checkpoint can assign pager numbers to families automatically, or your staff can enter custom numbers manually.
- Pager numbers are stored in people's profiles. Thus, Checkpoint users can look up a family's assigned number when necessary.
- Pager numbers are saved until an authorized Checkpoint user clears the numbers from the database.
- You can quickly return and reuse pager numbers.
- You can locate missing pager devices by viewing a report of all current pager assignments.

If you use pagers as part of your check-in system, this might require your check-in stations to be manned by staff or volunteers who can assign numbers and pagers. If you would rather provide self check-in stations, consider asking your attendees to enter their cell phone numbers as their pager numbers so that staff members and volunteers can still get in touch with parents if necessary.

> **Tip**
>
> If you designate a central location for parents to go when paged, it will help the children's director know that the parents were notified and have responded. It lets a children's lay leader escort the parent to the child's room, which helps maintain security within a children's wing. It also allows the notification system to be reset or cleared for visual displays. Plus, it's easy to train parents and inform guests to come to one main location.

Combining Methods

If you like the idea of giving pagers to members but don't have the budget to buy pagers for all families, consider combining these methods. You can use cell phones or provide flash cards to families with older children and reserve the pagers for families with infants or toddlers.

Badges

Badges are a popular security feature available with Checkpoint. You can print badges during check-in for parents, children, members, staff, or visitors. You can design badges for specific situations, such as for Sunday School children. You can even print badges ahead of time for an event. There are three main types of badges: security, visitor, and name badges.

Security Badges

Security Badges are typically used to securely match parents to their children at check-out. They include matching, unique identifying ID numbers. The security ID is a randomly-generated, unique identifying number that consists of both numbers and letters and is unique to each session. This ensures that someone can't use an old parent badge. You can also scan Security IDs with a bar code scanner.

Visitor Badges

Your organization may choose to make visitor badges look the same as security badges so that visitors fit in, or you can design them so that members can easily identify newcomers.

Use one-time visitor badges to ensure that everyone attending classes or activities at your organization is identifiable. Requiring visitor badges also means that people without badges cannot roam your campus unchallenged. This increases the security of your check-in system and helps put people at ease.

You can design a nice background graphic to indicate visitors. Visitor badges display security IDs and pager numbers like regular security badges. The fields you select for visitor badges also determine what information is collected from one-time visitors when they check-in, so if you want to use visitor badges for children, we recommend selecting Parent Name as one of the badge fields.

> ⚠ **Note**
>
> You cannot create multiple visitor badges templates, so we recommend designing a template that works well in a variety of scenarios.

Name Badges

Name badges are simple badges with the individual's name on it. These are intended to be used for adults attending events or meetings that don't require a security aspect. For example, you can easily print name badges for a women's luncheon or a men of the church meeting. You can customize a name badge's font size and background image to meet your organization's needs.

Name badge settings automatically apply to all assigned sessions. You can still print name badges for other sessions, but they will not reflect the customized fonts or background image unless assigned. You cannot create or save templates for name badges.

Security Considerations

If you decide to use badges, have a system in place for handling situations where a child or parent loses a badge.

- Request a driver's license to prove identity. You can compare it with the parents' names if you have included it on security badges.
- Check an authorized pick-up list. You can keep this list in the comments field in the child's individual record.
- Verify that no notes reflect custody issues.
- Ask the individual which children they need to pick up and what session they are checked into. (This information displays on the check-out screen.)

Multiple Security Badges Versus Combined Sessions Badges

When planning your check-in system, you can decide whether to print multiple badges per family or print a single combined sessions badge for a family.

- Every time you set up your check-in station, you decide which method you prefer, and each station can be different.
- For combined sessions badges, there's one template and all settings' selections automatically apply to all combined badges printed at check-in.
- We recommend that you set a standard policy and apply it to all check-in stations.

Multiple Security Badges

When checking in, each child gets a security badge, and you can print extras. For example, if you're checking in a 2 year old, print one security badge for the child and one for the diaper bag. For the parent, one badge prints with all their children listed on the badge. Like the child badge, you can print extras. That way, mom and dad can have matching parent badges.

Multiple security badges come in handy with multiple children too. For instance, the older child goes to Sunday school at 9:30 a.m. and then attends the worship service with his parents at 11:00 a.m. The younger child also attends Sunday school at 9:30 a.m., but then attends children's church at 11:00 a.m. In this case, the older child will get one child badge (for Sunday school), the younger child will get two badges (one for Sunday school, one for children's church), and the parents will get two badges (one for the Sunday school session and one for the children's church session). Check-in stations print multiple badges by default.

Combined Sessions Badges

The benefit of printing one combined sessions badge is that all child information is printed on one badge, making it easier for the parent. Additionally, your organization saves money and paper by printing all information on one badge. **When you use combined sessions badges, everyone gets one badge no matter how many sessions they attend.** Use the combined sessions badge when someone is checking into multiple sessions. A combined parent badge also prints for children with combined session badges. If a family has multiple children, a security number for each child prints on the same parent badge.

You can also save paper, ink, and money by printing multiple sessions on a badge. When someone checks in to more than one session, you can include to ten sessions on one badge, along with a single security ID. For example, instead of printing two separate security badges for children who attend both Sunday school and worship each week, you can print one combined sessions badge for each child.

There is one template for combined sessions badges, so any settings you manage automatically apply to all combined badges printed at check-in.

What displays on Combined Sessions Badges?

- If someone checks into 4 sessions or less, the session name, class, and category prints.
- If a person checks into 5 sessions or more, only the session name prints.
- Due to physical space constraints, badges with more than 4 sessions can only display a maximum of 10 characters.

- Randomly-generated security IDs display in the top right of combined sessions badges.
- If you're using pager numbers, the pager number displays in the top right corner of the combined sessions badge.

Printing, Printers, and Purchasing Supplies

To print combined badges, in the Select Sessions window, click **Print combined session badges**. You'll need to configure this at each check-in station. You must have a printer that specializes in printing labels to print badges from Checkpoint. We recommend that you purchase printers, blank labels, and other label supplies for printing badges from our online store.

Check-in Methods

Most organizations choose to use a combination of assisted and self check-in stations. The combination of stations depends on the needs of your congregation and the layout of your facilities. Take some time to consider how your members, volunteers, and staff will identify or locate members in Checkpoint; names, phone numbers, assigned pager numbers, bar codes, and/or biometrics.

> As a general rule, manned stations should face staff, and unmanned stations should face members.

Assisted Check-in

Assisted check-in stations are manned stations set up to help first-time attendees, guests, or anyone who needs help checking in at your organization. With assisted check-in, a trained volunteer or staff member can quickly determine attendees' needs, enter the appropriate information into Checkpoint, print the appropriate badges, and point the attendees in the right direction.

To further help your visitors, have volunteers available to escort your guests through the check-in/drop-off process and answer any questions they may have.

> **For First-time Attendees**
>
> To speed up data entry, have first-time attendees complete a paper form with the information you want to track in ACS. Then, enter their names and other information required to create a record in Checkpoint.
> When things quiet down, open People and use the paper form to enter the rest of the information.

Check In/Out

The Check In/Out process of Checkpoint is designed for assisted check-in stations manned by staff or volunteers. These users will need training to familiarize themselves with the program.

Because Check In/Out is only accessible through the full ACS installation, your users can have full access to all of your ACS modules and data. For example, you can use the Find Person process to search records in the People module or add a new family or individual just as you would in ACS People. However, you can limit the access of your users by limiting their user account rights.

Other benefits of Check In/Out include:

- Checking in one-time visitors.
- Adding and editing special notes to print on security badges.
- Reprinting parent badges. You can reprint parent badges by entering the family name in the Check In /Out window and then selecting which badges you want to print.
- Viewing session statistics, which provides a summary of who signed into which sessions.

Self Check-in

Self Check-in stations are unmanned stations normally used by members who are familiar with the check-in process and don't need assistance. When you first introduce self check-in stations, make sure you have trained volunteers on hand to instruct members how to use them. Once members are comfortable, you could post a quick-reference instruction card at each station. When Checkpoint is in place and your members are familiar with it, most of your regular attendees will probably be able to use a self check-in station.

Checkpoint has a kiosk mode that is designed for self check-in. It features a user-friendly interface and has limited access to the ACS database. Self check-in stations are designed for members and regular attendees who are already in your ACS database and know how to use the kiosk to check-in. Many organizations find that touchscreen monitors are ideal for self check-in stations.

Express Check In/Out

Express Check In/Out is simpler and ideal for self check-in kiosks. It's specially designed to work with touchscreen monitors, and it is easier for members to use. Other benefits of Express Check In/Out include:

- Users need little to no training.
- You can implement user-friendly touchscreen monitors.
- Users have limited ability to add a family or individual.
- Visual appeal – you can customize colors and background image.

Deciding How Many Check-in Stations You Need

Determining the number of check-in stations you need is always a challenge. Use the Checkpoint Stations Formula and Check-in Time Tables to decide how many stations you need per entrance. **In general, you should aim for about eight seconds to check-in individuals and about 30 seconds for a family to check-in.**

Checkpoint Stations Formula

This formula can help you determine the number of check-in stations to use at a particular entrance.

Divide the number of families who typically check-in each week by the entrance with the heaviest traffic time by the number of minutes. Then, multiply that answer by your check-in goal. For the calculation, measure the check-in goal per family and in minutes, such as 20 seconds per family, or *0.33* minutes.

The formula looks like this:

For Example

At your church's main entrance, ***60*** families typically check in during a ***15*** -minute period. This is the heaviest period of traffic. To determine the number of Checkpoint stations you need, the formula looks like this:

To correct any impossibilities and allow for growth, round up to the nearest whole number. So, your church needs **2** Checkpoint stations at its main entrance.

Check-in Time Tables

These tables suggest how many check-in stations you may need for different conditions. The tables calculate the number of Checkpoint stations needed depending on how long it takes families to check in and traffic time intervals. Use the tables to help you determine the number of stations your organization needs.

Table 1 — 15 minute period

Table 1 shows how many families can check in during a 15 minute period, according to how long it takes each family to check in and how many check-in stations are available.

Time to check-in (in seconds)	1 Station	2 Stations	3 Stations	4 Stations
40	22 families	44 families	66 families	88 families
35	25	50	75	100
30	30	60	90	120
25	36	72	108	144
20	45	90	135	180
15	60	120	180	240

Table 2 — Time intervals

Table 2 shows how many families can check in at a single station during a specified interval of time, according to how long it takes each family to check-in.

Time to check in (in seconds)	5 Minutes	10 Minutes	15 Minutes	20 Minutes
40	7 families	15 families	22 families	30 families
35	8	17	25	34
30	10	20	30	40
25	12	24	36	48
20	15	30	45	60
15	20	40	60	80

Arranging Check-in Stations

When planning setup for check-in stations, there are a number of factors to consider. Here are some ideas and suggestions on how best to arrange them given a variety of situations.

> ⚠ **Assisted vs. Self Check-in**
>
> As a general rule, manned stations should face staff, and unmanned stations should face members. See Check-in Methods for more information about assisted and self check-in stations.

Families with Children

Check-in stations should be placed in close proximity to entrances used by families who are bringing children to classes. You should also have enough space between stations so that families can gather around them without blocking other stations.

For Multiple Entrances and Large Lobbies

For congregations with large entry lobbies, consider clustering the check-in stations in a common location. For congregations with multiple entrances with no common gathering point, you may want to spread your check-in stations throughout the campus. Avoid locating check-in stations in narrow hallways or congested areas of your campus. Remember, if people are frustrated with the time it takes to check-in, they will bypass the process.

Visitors

Depending on the size of your campus, you need at least one centrally located, visible, and well-staffed visitor check-in station. Having one assisted check-in station that is designated for welcoming and checking in visitors is a great way to establish positive first impressions, however, assisted check-in stations don't have to be geared *only* for visitors.

First-time guests won't know how to use Checkpoint and may need help checking in and printing security badges for their children. Conveniently, this can also be the time and place to collect some information from guests that your organization likes to keep on file. It can take several minutes to gather such information, so if you welcome a large number of guests each week, you may need multiple visitor stations.

Volunteers

Keep in mind the number of volunteers and staff members that are available to man the check-in stations. Obviously, you will need a volunteer for each manned station, but you should also plan to have volunteers available to help with the unmanned stations.

When you first introduce your check-in system, it's best to have one volunteer per check-in station to walk members through the process. As attendees become more familiar with check-in stations, you can reduce the number of volunteers. However, it’s good to have at least one person on hand to assist with any questions or problems that arise. If you have several unmanned check-in stations in a cluster, one volunteer may be able to handle them all.

Power Outlets and Internet Connection

Though it seems intuitive, be sure to consider the location of power outlets and network connections when selecting check-in locations. If you're building a new facility, be sure to incorporate these needs into your plan.

If your facilities span across multiple buildings or campuses, or a network connection is simply not available in certain areas, you can run Checkpoint in disconnected mode, where the data is first exported from the server and imported into the disconnected station. After check-in, export the data and then sync it back with the server.

Other Suggestions

- If you print labels or badges for your attendees, remember to have trash cans nearby.
- If check-out is not required for some events, you may want to consider converting the stations into information centers after the service, class, or activity is over. Attendees could register for other events, look up congregational information, or update their personal profiles using Access ACS.
- If you use OnDemand on a kiosk, you can configure it to automatically log in to Checkpoint.

Setting Up Badge Printers

To print badges from Checkpoint, you must have a printer that specializes in printing labels. We recommend using the Dymo® LabelWriter 450 Turbo series or the Zebra® Wireless GX420d label printers.

Before following any of the steps below, you'll need to install the Dymo or Zebra printer driver according to the installation instructions that came with your printer. After installation is complete, configure the printer with ACS so you can start printing Checkpoint badges. Setup steps are different for locally installed ACS and ACS OnDemand™, so make sure you follow the instructions for your version of ACS and select the correct paper size and orientation using the steps below.

⚠ **Keep in mind**

You must log on as an administrator and perform these steps on any workstation you plan to use. If you don't, the settings may not save.

Printer Setup and Installation

Dymo Printer

The Dymo 450 Turbo LabelWriter prints high resolution security names badges used for child check-in. Multiple label colors are available and because it is a thermal printer, no ribbon, toner, or ink cartridges are used. The Dymo LabelWriter printer is compatible with ACS and Realm.

Zebra Printer

The Zebra GX420d is compatible with ACS, PDS, and HeadMaster desktop and OnDemand. This printer offers a small footprint, and it's designed for low- to mid-volume label printing needs. It's ideal for creating person ID and access control, security, and photo processing labels.

Mac computers are not compatible with the Zebra GX420d Wireless printer

Setting up the Printer on a Windows PC

⚠ **Notes**

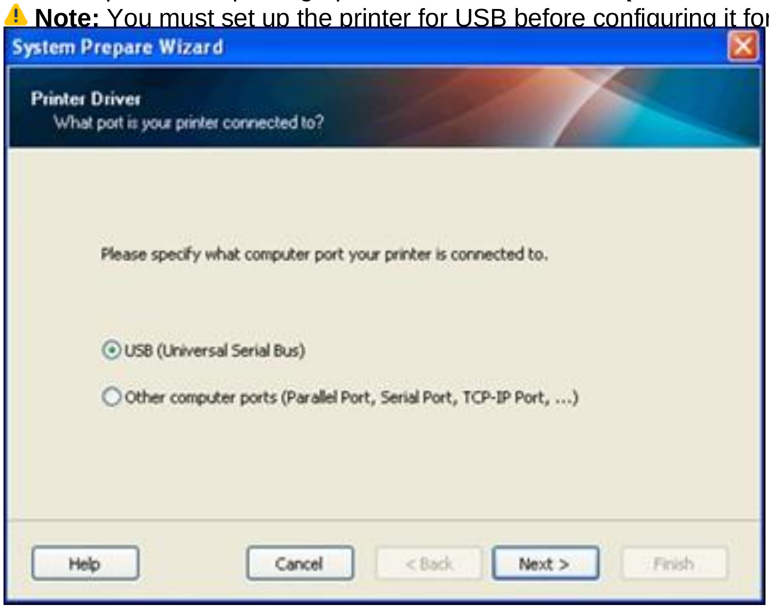
- If you use a **Mac**, you'll need to contact Support at 1-800-669-2509 for assistance.
- Do not plug the printer into your computer. You will do that later in the procedure below.

1. Static IP address
2. Subnet mask
3. Default gateway
4. SSID
5. The type of security or encryption used on your network, such as WPA2, WEP, etc.

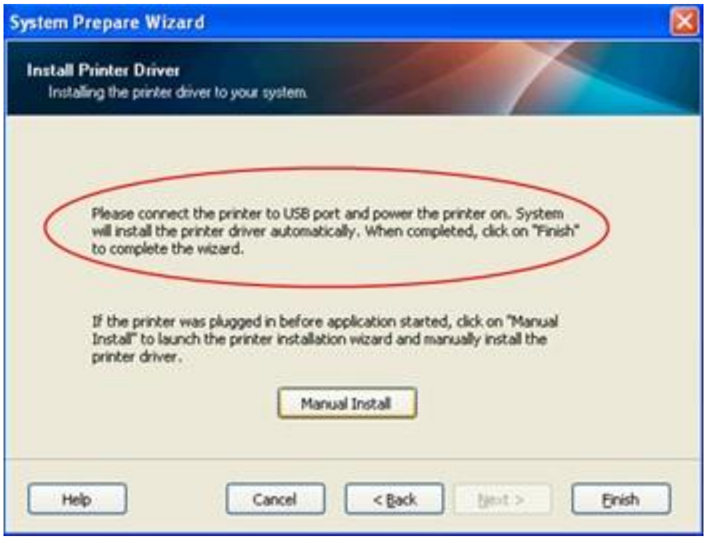
6. Wireless password or key

1. Insert the Zebra Setup Utilities CD.
2. Double-click the Zebra Application.exe file. The installation wizard displays.
3. Click **Next** in each window to accept the default settings.
4. In the final window, click **Finish**.
5. The first window of the System Prepare Wizard displays. Click **Next** to preload the print driver package.

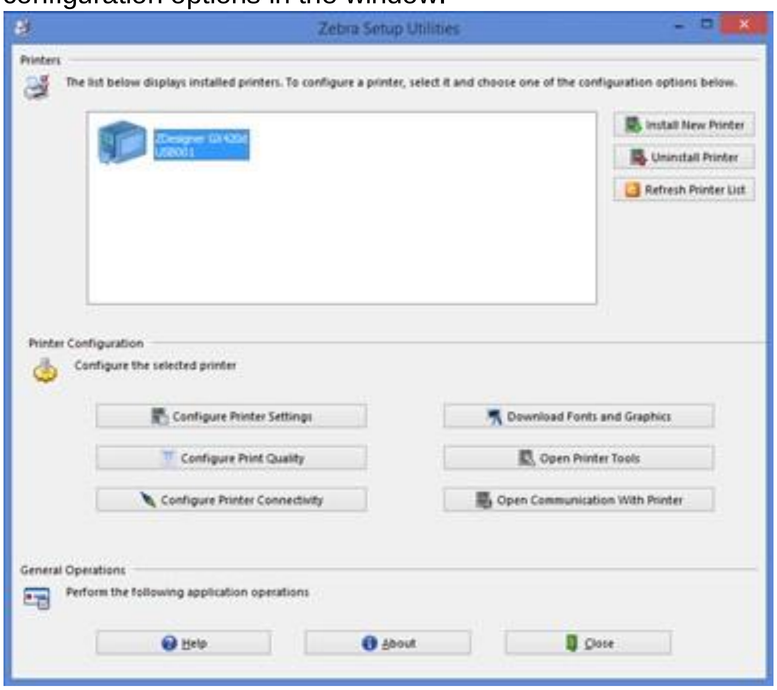
6. After the print driver package preloads, select the **USB (Universal Serial Bus)** option, and click **Next**.
   ⚠ **Note:** You must set up the printer for USB before configuring it for wireless.



7. Follow the first set of instructions in the window for USB connectivity.



8. After your Windows operating system displays a message that your new hardware is installed and ready to use, click **Finish**.
9. The Zebra Setup Utilities window displays. Select the GX420d printer icon to activate the printer configuration options in the window.



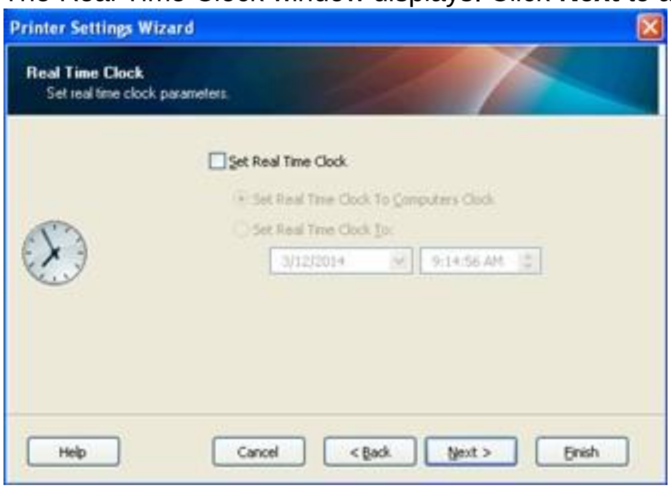
1. In the Zebra Setup Utilities window, click **Configure Printer Settings**. The Label Parameters window displays.
    a. In the **Units** drop-down list, select **inch**.
    b. Set the width to **2.25** and the height to **4.00**.
    c. Set the orientation to **Normal**.

2. Click **Next**. The Speed and Darkness window displays. The options in this window set the speed of the label feed and the darkness of the ink. Click **Next** to accept the default selections.

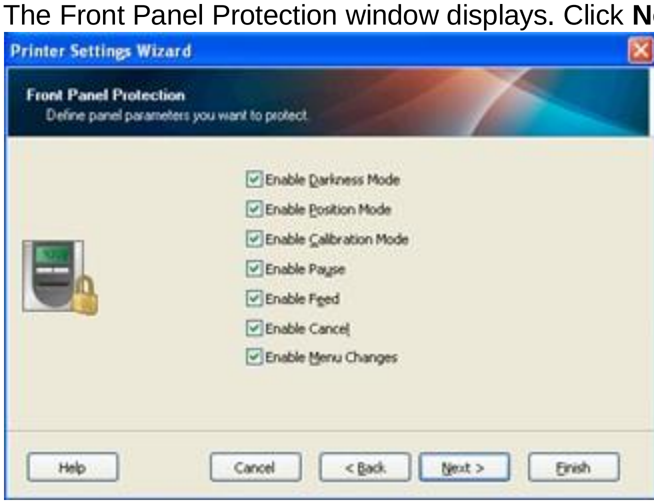
3. The Media window displays. Click **Next** to accept the default selections.

4. The Advanced Settings window displays. Click **Next** to accept the default selections.

5. The Real Time Clock window displays. Click **Next** to accept the default selections.



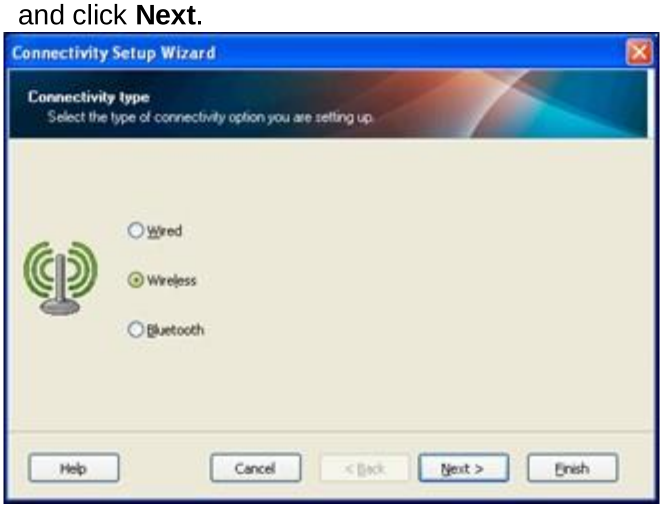
6. The Front Panel Protection window displays. Click **Next** to accept the default selections.



7. The Sensor Settings window displays. Click **Next** to accept the default selections.

8. The Save Settings window displays.
    a. By default, the **Save settings to File** check box is clear. This ensures that your saved settings are stored in your printer.
    b. Click **Finish**.

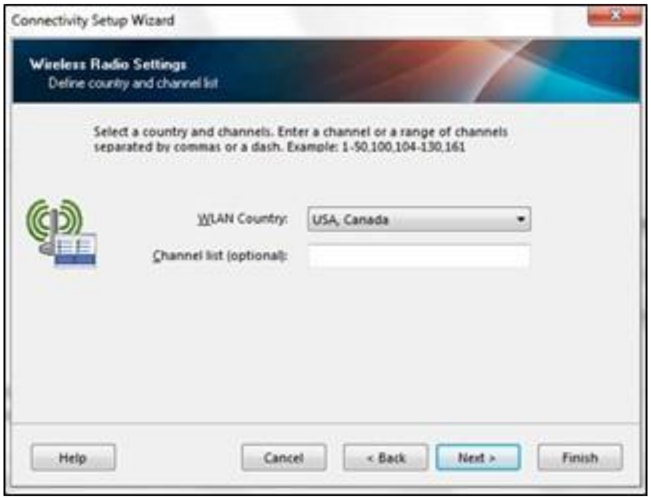
1. In the Zebra Setup Utilities window, click **Configure Printer Connectivity,** then select **Wireless**, and click **Next**.



2. In the IP address window, you must assign an IP address, subnet mask, and default gateway (router IP address) for your printer.
   a. Select **Static.**
   b. Optionally, you can enter a hostname which is a descriptive name for your printer on your network. For example, if it's a dedicated printer for the nursery, you might assign *Nursery1* as a hostname. c. Enter your IP settings, and click **Next**.

3. The Define Radio Settings window displays. Click **Next** to accept the default settings.

4. In the Define Country and Channel List window, select your country, and click **Next**.



5. In the Wireless settings window:
   a. Enter your ESSID.
   b. In the **Security mode** drop-down list, select the appropriate encryption protocol for your wireless network, and click **Next**.

6. A Security settings window displays according to the security mode you selected in the previous window. Select **String**, enter your PSK name as a string, and click **Next.**

Note: To enter the PSK name in Hex format, please see your network administrator or IT technician.

7. The Advanced wireless settings window displays. To access detailed options for your wireless settings, click **Advanced Settings**. When finished, click **Next**.

8. The Final stream window displays the connectivity configuration settings that will be sent to the printer. Click **Next**.

9. In the Send data window, select **Printer**, and click **Finish**.

10. Turn off the printer, and then turn it back on. Wait about 15 seconds to ensure the LCD screen on the printer displays the static IP address and the signal strength.

Now you are ready to configure your Zebra printer for wireless connectivity within your Windows operating system.

1. In Windows, select **Control Panel**.
2. Click **Devices and Printers**. The Devices and Printers window displays with printer icons representing each printer connected to your computer.
3. On the top task bar, click **Add a printer**. A wizard displays that will guide you through adding your Zebra printer with wireless connectivity.
4. Click **The printer that I want isn't listed**. A window displays with printer options.
5. Select **Add a local printer or network printer with manual settings**, and click **Next**.
6. Select **Create a new port**.
7. In the drop-down list, select **Standard TCP/IP Port**, and click **Next**.
8. In the **Hostname or IP address** field, enter the static IP address. Accept the default settings for the other options, and click **Next**.
9. Accept all default settings, and click **Next**.
10. Select manufacturer **ZDesigner** and model **ZDesigner GX420d**, and click **Next**.
11. In the next few windows, you will have the options to verify the printer name, set it as the default printer, select if you want to share the printer, and describe the printer location.
12. In the last window of the wizard, click **Finish** without printing a test page. The wizard closes, and the Devices and Printers window displays.
13. Unplug the USB cable from your printer.
14. In the Devices and Printers window, right-click on the **ZDesigner GX420d** icon, and select **Printer Properties**. The Properties window displays with a group of tabs.
15. On the **Advanced** tab of the Properties window, click **Printing Defaults**. The Printing Defaults window displays with a group of tabs.
16. On the **Options** tab, set the width to 2.25 and the height to 4.00. Select **landscape**, and click **OK**. The Properties window remains open.
17. On the **Options** tab, verify the label settings and click **OK**. The Printing Preferences window closes, and the Properties window remains open.
18. On the General tab, click **Preferences**. The Printing Preferences window displays with a group of tabs.
19. On the **General** tab, click **Print Test Page** in order to print a test label.
20. After the test label prints, click **OK** to close the Properties window.
    Your printer is now ready to use.

To view forms and supplies that work with our software and services, visit our online store.

If you have questions or concerns about using a wireless printer, please read our Wireless Printing Terms and Recommendations.

Are you an OnDemand customer?

If you're not sure, read How do I know if I'm an OnDemand Customer?

If you use OnDemand, you'll need to set the printer up in OnDemand also.

Checking In

After you prepare your check-in stations, you're ready for people to begin checking in. Learn how to check in at assisted check-in stations, self check-in stations, one-time visitors, and what to do if check-in cannot be completed.

There are four basic steps for check-in:

1. Locate a family's record.
2. Select the sessions the family members are attending.
3. Edit the family's pager number (if necessary).
4. Print badges.

Checking in at an Assisted Check-in

At assisted check-in stations, authorized people can help check members and visitors in. The instructions are the same for both families and individuals. Families can be checked in together or separately.

To check in at a self check-in station, first locate the family's record. Once you have located the family's record, you can select the sessions they are attending. After selecting sessions, you can edit the family's information, including pager number and individual notes. Then, you can print badges.

Good to know!

- After an individual or a family checks in, the check-in window clears and returns to the start window for the next person to check-in.
- The assisted check-in start window is the starting point at which you can begin checking people in.
- The check-in window is also the check-out window.
- Before you can start checking in, make sure you have prepared the station for check-in.

1. In the assisted check-in start window, under **Locate By**, enter either the family's last name, phone number, pager, or bar code number. Depending on your global settings, not all of these options may be available.
2. Enter the name, phone number, or pager number of the family.
3. Click **Enter**.
4. If multiple families match this information, select the correct family. (Click **Family Members** to view the individual members of a family.)

1. Select the sessions that each family member is attending. Or, click **Check In All** to select all sessions.
2. You will have the option to add people to groups that they are not yet in. Click **Add to Group** to add a family member to a session. If a person is already in a group and you want to check them into a different one, you can do this by checking the person in and clicking on the group's name. Click **Add New Roster**.
3. For each new session, enter the person's class, status, position, and other attendance information.

1. To change the family's pager number, click **Edit Pager**. Or, to enter a pager number for the first time, click **Add Pager #**.
2. To enter the next available pager number, click **Use Next #,** then click **Next**.
3. You can also view and modify the individual notes about each family member. To add a note about a family member, click **Add Note**. To edit an existing note, click on the note, make the necessary changes, then click **OK**.

1. Click **Next**.
2. Select each badge you want to print. Or, click **Print All Security Badges** to print all child and parent security badges.
3. Click **Finish**. The family is checked in.

Checking in at Self Check-in

The self check-in start window is where your members can check-in and out of classes and activities. Families can check in at the same time or if Dad has to park the car while Mom checks the kids in, Dad can check-in separately. At a self check-in station, check-in procedures are the same for individuals or families.

Good to know!

- After an individual or a family checks in, the check-in window clears and returns to the start window for the next person to check-in.
- The start window of the self check-in screen will vary based on your color scheme, background image, and selected Locate By options.
- The check-in window is also the check-out window.
- Before members can start checking in, make sure you have prepared the station for check-in.

1. In the self check-in start window, select either **Name**, **Phone**, or **Pager**. Or, scan the family's bar code and skip to selecting sessions. Depending on your global settings, not all of these options may be available.
2. Click **Find**.
3. If multiple families match this information, select the correct family and click **OK**.

Once you've located the family's record, you can select the sessions they are attending.

1. Select the sessions that each family member is attending. To select every available session, click **Select All**.
2. Depending on your settings, you may have the option to add people to groups that they are not yet in. To add a family member to a session, click **Add to Group.**
3. For each new session, enter the person's class, status, position, and other attendance information.

Once you've selected the sessions, you can edit the family's information, including pager number.

1. Select the existing pager number to change it.
2. Enter the new pager number. To enter the next available pager number, click **Next #.**

Once you've edited the family's pager number, you can print badges and finish.

1. Click **Next**.
2. Select each badge you want to print. Or, to print all available badges, click **Print All**.
3. Click **Finish**. The family is checked in.

Checking in One-time Visitors (Assisted)

From time to time, you may have one-time visitors at your organization. They may be vacationing in your town, and visiting your church. You don't need to enter the visitor's information in your ACS dataset, but you can still check these visitors in and print badges. For one-time visitors, you can select whether to print a parent badge too.

Good to know!

- Before you start checking visitors in, make sure you have prepared stations for check-in.
- One-time visitors must check in at assisted check-in stations.
- You can check in a visitor and the visitor's family at one time.

1. In the assisted check-in start window, under **New Family/Visitor**, click **One-time Visitor**.
2. Enter the visitor's first and last name.
3. In the drop-down list, select the session the visitor is attending.
4. Select the specific class and roster of the session, then click **Add** . This moves the session to the list of ones that the visitor is attending.
5. If you want to print a parent badge, select **Print Visitor Parent Badges**.
6. If you selected multiple sessions, click **Print Combined Visitor Badges** to print all sessions on one visitor badge.
7. If applicable, enter the visitor's pager number.
8. If applicable, click **Save/Add Family Member** and continue adding family members.
9. Click **Print**. The visitor badges print and the visitor is checked in.

Check-in Cannot be Completed

From time to time you may come across an error message that says check-in cannot be completed or that classes are not showing.The following message displays when someone tries to to check-in:

Your Check In cannot be completed

This happens when:

1. The person is not enrolled in any of the sessions (or template) that the station is set up to check-in.
   To correct this issue, confirm the event and date they want to attend and locate which station can check them in.

2. The **Display Options for Adding to Groups** option is not selected in Checkpoint Setup.

Go to **Check In/Out Defaults** under **Express Check In/Out Options** to locate the **Display Options for Adding to Groups** option. During assisted check-in, you will always be able to add people to groups who are not already enrolled in one. You can check this individual in through assisted check-in, or you can enable **Options for Adding to Groups**.

Classes not showing

Classes that are unavailable do not display at self check-in. A class may be unavailable for a few reasons:

- The class reached its maximum attendance and closed automatically.
- The class was closed manually by a staff person.
- The individual is in a group which meets in multiple locations, but some locations are full.
- The individual is in multiple classes within the same group, but the session limits which classes display.

Record Not Found?

If you enter information to locate an individual and you know (a) the information is correct and (b) their record is stored in ACS, but receive the *Record Not Found* error, then that person is not enrolled in any of the sessions or templates at your check-in station.

This person must check-in at a station that is set up for their template or sessions. To avoid this situation in the future, consider turning on the Add to Group option for sessions and template.

Security Rights for Check-In Stations

The following table describes the minimum ACS rights that check-in stations require:

ACS Security Rights

Checkpoint Functionality	Security Area	Security Option	Minimum Access
Check in and out	Checkpoint	Check In/Out	All
Add a new person while checking in	People	Add Family/Individual	All
Add someone to a class while checking in	Attendance	Add/Edit Individual Classes	All
Add someone to an activity group while checking in	People	Add/Edit Individual Activities	All
Add someone to a small group while checking in	People	Small Groups	All
Post attendance from Checkpoint	Attendance	Enter/Post Attendance	All
Look to see if someone is checked in and where	Checkpoint	Session Statistics	All

Microsoft Windows Security

Microsoft Windows user accounts can be Restricted User accounts. Users must be granted read/write permissions on the following directories:

- Windows\Fonts (workstation)
- Winacs (workstation)
- Acsnet (server)

Checkpoint Technical Requirements

The physical setup of your check-in stations is a very important component of your check-in system. Checkin stations need to have enough space between them for families to move around them comfortably. Trained staff members should be available at all assisted check-in stations as well as near the self check-in stations for members who have questions or encounter any issues.

Computer Security

When you're using unmanned check-in stations, computer security is a top priority. You may want to consider having the unmanned computers in a secure cabinet. Or, put a touchscreen monitor and a label printer on top of a locked cabinet, with the rest of the hardware locked behind the door.

You could also use all-in-one kiosks, which typically come with built-in computers and touch-screen monitors; some include printers and scanners. These kiosks can usually be rolled around and moved to different places depending on the needs of the event. the ACS All-In-One Kiosk from our online store at http s://store.acstechnologies.com.

Hardware Requirements

While any ACS workstation can be used as a check-in station, consider these hardware guidelines.

Touchscreen Monitors — If you choose to use touchscreen monitors, we recommend using ones that incorporate five-wire resistive touch technology.

Printers — Checkpoint requires a label printer for badges to print properly. ACS Technologies tests and supports the Zebra® GK420d, and Dymo® LabelWriter Turbo 450. See Setting up Badge Printers for more information.

Bar Code Scanners — Must be able to read a Code 39-digit bar code (C39-digit UPC code) with carriage return.

PVC ID Cards — We have had some clients integrate plastic ID cards/PVC ID cards or Barcode ID cards with Checkpoint.

ACS Technologies Online Store

You can purchase the ACS All-In-One Kiosk, touchscreen monitors, label printers, bar code scanners, and full ACS All-In-One Kiosks that have been thoroughly tested with ACS Checkpoint from our online store at https://store.acstechnologies.com

Software Requirements

We recommend that you always have the latest version of ACS installed and adhere to the ACS System Requirements to install ACS.

If the station is an Express Check-In/Out station, the only ACS program needed is Checkpoint Kiosk (axcpkio.exe). The Checkpoint kiosk program only runs the Express Check-In/Out feature of Checkpoint. No other ACS programs are operational or accessible.

Integrating with ACS Groups

Checkpoint works with the groups in ACS. Groups may include ACS classes, activities, and Access ACS small groups. You organize the groups into Checkpoint sessions. Then, members check into sessions, so you must have sessions to check people in.

> A group plus an event equals a session.

Customizing Sessions

1. **Limit Sessions to specific groups to organize your check-in area**. If you have check-in stations dispersed across your campus (instead of being in one central location), you can create different sessions with classes based on where the classrooms are. Say you have a wing for high school students, you can limit the check-in stations in that wing to sessions for youth classes.

2. **Assign attendance groups to more than one location.** If you have several nursery rooms for 12-18 month olds, and each room can accommodate ten, you can arrange the maximum classroom size and locations in ACS Groups and Attendance setup. You can only configure classroom sizes if you have two or more locations attached to a class – not for a single location.

   > If you set maximum class size, occupancy limits are strictly enforced. If you have overages, you must add a new location or adjust the maximum number of people in Attendance Setup. You can also close groups manually to temporarily decrease the number of people attending a group for one time. This is helpful if more than one teacher normally leads a class, but one of the teachers is unable to attend.
   >
   > When members check-in for the first time, they are asked to select a location. When the limit is reached for a specific location, members can no longer check-in to that location and it won't display at self check-in stations. Checkpoint remembers the location from week to week, so members only need to select a location if it changes.

3. **Assign sessions to specific check-in stations.** When you set up your check-in stations, you can choose up to ten sessions for check-in. Workstations can have different sessions, so you can target your check-in stations to a particular set of sessions. For example, on Sunday mornings you may designate one check-in station for worship services and designate two stations for Sunday School classes.

4. **Specify badges for each session.** With Checkpoint you have a variety of badge templates, including child and parent security badges, visitor badges, and simple name badges. You can customize these and assign them to specific sessions. See Badges for more information.

5. **Customize the look of sessions.** You can customize the color scheme and background images of sessions. Use images to promote events, match a group theme, celebrate the current season, or reflect your organization's culture.

Global Settings

Global settings are most helpful when you're setting up Checkpoint for the first time. Decide which settings you want all of your sessions and templates to have in common. This way, you don't have to constantly change the settings of each session and template.

You can also use global settings delegate the task of creating templates and sessions. This keeps your templates and sessions professional, and consistent while controlling the settings for them. Most global settings act as defaults. In general, global settings don't change templates and sessions that have already been added; they only affect newly-created ones. Some global settings do override all sessions and templates.

Templates

Use templates to save time and effort by managing the settings of related Checkpoint sessions together. For example, every week, you have (a) two Sunday School classes for *preschool* and (b) six for *elementary school*. Each Sunday School class is entered under one of two Checkpoint sessions, either the (a) *preschool* or (b) *elementary* session. You will want all of the classes to look the same on the check-in screen and have the same settings. By including all of the sessions within a common template, the "Children's Sunday School Template," you can control the Checkpoint settings for all classes at once.

Templates and User Permissions

You must use sessions with Checkpoint, however, organizing sessions into templates is optional. Once you decide to use only sessions or use sessions with templates, consider what you want your staff to be able to select when setting up check-in stations.

Sessions alone might be the right choice if you're comfortable with your staff having permission to:

- select color schemes and background images
- determine what information to gather at each event
- set badge templates.

Your staff will have more freedom with the settings. If you prefer to have more control over those areas, or if you often use volunteer staff, you may want to organize all of your sessions into templates. Having all sessions contained within templates would allow you to hide sessions during check-in station setup. This way, you can manage the templates , which would limit your staff to only your pre-determined options for checking in.

Checking Out

Generally, all attendees leave a service or event at the same time, and most people would rather bypass check-out to avoid the bottleneck. A more realistic plan may be to enlist volunteers to check everyone out after the service, or for staff members to do so the next work day. However, you might want to require members to check out at special events, such as lock-ins. The process of checking out is the same process as Checking In. After you have located the family's record, select **Check Out** by the name of the person that you want to check out. Or, click **Check Out All** to check out all of the family members from all sessions. Check-out can be run on self and assisted stations, and individuals must be checked in, of course, in order to check out.

> **Note**
>
> Do not incorporate a manual check-out if you plan to post attendance through Checkpoint Sessions. When you post attendance from Checkpoint, the individuals are automatically checked out when the attendance markings are posted.

Returning Pagers

Some ministries hand out pager devices at check-in. Later, families return the devices as they check out. If returning pager devices is part of your check-in system, follow the steps below to clear pager numbers from families while they check out. This makes the pager return process quick and easy, part of your normal check in and out system. To speed up the return process, you can scan or enter multiple pager numbers at a time, and then clear them all together.

1. In the assisted check-in start window, click **View Statistics**.
2. Click the **Pager Return** tab.
3. Scan or enter the pager number.
4. Press **Enter**.
5. Continue scanning and entering pager numbers until all of the pager devices are returned.
6. Click **Clear Pager Numbers**. The pager numbers are no longer assigned to the families.

Locate Missing Pagers

When families leave, they may forget to return the pager devices they received during check-in. If you hand out pager devices as part of your check-in system, you may need to track down unreturned pager devices. Viewing a list of all still-assigned pager numbers can help you locate the missing devices.

1. Under **Run Inquiries**, click the **Inquiry Type** tab.
2. In the drop-down list, select **Checkpoint Session Inquiry** and click **Go**.
3. Click on the **Pager Return** tab.
4. Under the grid, click **View Pager Assignments**. You can see the full list of current pager assignments, including the phone number of each family. To print a complete report of the assigned pager numbers, click **Print**.

Preparing Stations for Check-in

There are two ways to set up your check-in stations: with someone to assist the person with check-in or self check-in. Below are the instructions on how to set up self check-in stations and assisted check-in stations. Once you've set up your stations, you'll be ready to check people in.

Assisted Check-in Stations Assisted Check-in Stations

Assisted (or manned) check-in stations should be run by staff or church leaders who are trained on how to set up check-in stations for each use. After setting up each assisted check-in station, you can start checking in people.

1. Open and log in to ACS People Suite.
2. Under **Manage Records**, click the **Involvement** tab.
3. In the drop-down list, select **Check In/Out** and click **Go**.
4. In the **Select Printer** list, select the printer that the check-in station uses to print badges. Depending on your settings, you can also select what type of badges to automatically print during check-in.
5. Under **Select Posting Date**, select the date to record for attendance markings.
6. Select either **Templates** or **Sessions**. Depending on your settings, sessions may or may not be available.
7. Select the templates or sessions that people check in to at this station. You can select up to 10 sessions per check-in station, and each station can have different templates and sessions selected.

   Useful Information

   You must select either one template or one or more sessions at each check-in station.
   You cannot select templates and sessions at one check-in station and you cannot select more than one template per check-in station.

8. If you selected multiple sessions and want to print combined sessions badges, select **Print combined session badges**.
9. When finished, click **OK**. You are ready to to start checking people in.

Self Check-in Stations

Along with assisted check-in stations, you can set up self (or unmanned) check-in stations. While self check-in stations are intended for members to use by themselves, you still need to have trained staff and/or volunteers to set up the check-in stations for each use.

Once you set the check-in stations up, you'll be ready for check-in. Depending on how Checkpoint is installed, you can access self check-in through either **Checkpoint KIOSK** or through **ACS People Suite**.

1. On your computer C: drive, click **Checkpoint KIOSK**.
2. Enter your user name and password, then click **OK**.
3. Select the date to record for attendance markings.
4. Select the printer that the check-in station uses to print badges.
5. Depending on your settings, you can also select what type of badges to automatically print during check-in.
6. Select either **Select Template** or **Select Sessions**. Depending on your settings, sessions may or may not be available.
7. Select the template or sessions that people check in to at this station.

8. If you selected multiple sessions and want to print combined sessions badges, select **Print combined session badges**.
9. If you selected multiple sessions and the sessions use different images, select the images you want to appear in the check-in window.
10. Click **Start**. The station is ready for people to start checking in.

1. Open and log in to ACS People Suite.
2. Under **Manage Records**, click the **Involvement** tab.
3. In the drop-down list, select **Express Check In/Out** and click **Go**.
4. Select the date you want to record for attendance markings.
5. Select the printer that will print badges for the check-in station.
6. Depending on your settings selections, you can choose what type of badges to print automatically at check-in.
7. Choose either **Select Template** or **Select Sessions**. (Sessions may or may not be available based on your Checkpoint administrator settings).
8. Select the template or sessions that people will check-in to at this station.

   If you selected multiple sessions...

   - Select **Print combined session badges** if you want to print combined sessions badges.
   - Select the images you want to display in the check-in window if the sessions use different images.

9. Click **Start**. The station is ready for people to start checking in.

Setting Up Checkpoint

Once you've implemented Checkpoint with your check-in systems and have physically set up check-in stations, you're ready to set up the Checkpoint module.

New to Checkpoint?

If this is your first time using Checkpoint, you may want to read about Checkpoint software permissions a nd installing Checkpoint first. After you've installed Checkpoint, we recommend reading about creating badge templates, using pagers, and managing global settings. After you've decided how to use these features of Checkpoint, you can focus on integrating your classes and activities with Checkpoint by creating templates and sessions.

Checkpoint Veteran?

If this isn't your first time setting up Checkpoint, use this section to help you update Checkpoint for the ever-changing needs of your organization. As you add new classes and activities, you may need to revisit the how to create templates and sessions. As your security procedures evolve, you may need reminders on creating badge templates, setting security IDs, setting up bar codes, and using pagers.

Checkpoint User Permissions

Your IT department should use the following information to configure the security of your check-in stations.

ACS Security

For a check-in station to perform a specific Checkpoint function, it must meet the minimum access level in each security option and area. The following table describes the minimum ACS rights that check-in stations require.

Checkpoint function	Security area	Security option	Minimum access
Check-in and -out	Checkpoint	Check In/Out	All
Add a new person while checking in	People	Add Family/Individual	All
Add someone to an activity group at check-in	People	Add/Edit Individual Activities	All
Add someone to a small group at check-in	People	Small Groups	All
Post attendance from Checkpoint	Attendance	Enter/Post Attendance	All
Look to see if someone is checked in and where	Checkpoint	Session Statistics	All

Microsoft Windows Security

Microsoft Windows user accounts can be restricted user accounts. However, they must have full access to the following directories:

- Windows\Fonts (workstation)
- WINACS (workstation)
- ACSNET (server)

Delegate Tasks to Others

You're busy and can't do everything! By selecting default settings for sessions, you can allow users to create sessions. This frees you from having to create sessions and ensures that the sessions have consistent settings.

To allow users to create sessions with default settings:

1. Under **Advanced Tools**, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users** and click **Go** .
3. On the **Users** tab, select the user and click **Edit**.

4. On the **Security** tab, expand **Checkpoint**.
5. Right-click **Add/Edit Checkpoint Defaults**.
6. Select either **None** or **View**.
7. Right-click **Add/Edit Sessions**, then select **All**.
8. Click **Apply**, then **OK**.

Installing Checkpoint

You can install Checkpoint in one of two ways: as a Kiosk using the disconnected mode or as part of a full installation. The Kiosk version, includes only the Express Check In/Out component of Checkpoint and no other ACS modules. Generally, the Kiosk version is used at self check-in stations, and the full version is used at assisted check-in stations. There are advantages to both ways, and you choose how you want to install Checkpoint on each individual workstation.

OnDemand Clients

When using ACS OnDemand, the only installation option is the full version of ACS. You can still setup some stations for self check-in and others for assisted check-in. You can also create a Check In/Out password as a Global Setting in Checkpoint Setup that is required in order to close out of the check-in window. This prevents users from accessing any other part of the ACS database.

Kiosk or Disconnected Installation

If you choose to install Checkpoint using the kiosk or disconnected version, users only have access to Express Check In/Out. No other ACS functionality is installed. This provides tighter security and is easier for members to use. Since the kiosk is user-friendly, it's usually set up as a self check-in station. You could also set up several kiosks / self check-in stations, with one volunteer overseeing all of them. Kiosks can be turned into information centers after activities are over.

If you're installing Checkpoint as a disconnected / kiosk mode, the installation instructions are nearly the same - just select **Checkpoint KIOSK** in the installation window.

Full Installation

A full installation of Checkpoint provides access to all ACS data, and allows you to use either Assisted Check-in or Self Check-in. However, the information available is determined by the user security rights for each user name. Stations with full installations are best used as manned check-in stations and for administrative uses of Checkpoint. Check-in stations for visitors should be set up as full installations; this allows administrators to add visitor information directly into ACS.

The instructions for installing the full version of Checkpoint are the same as for ACS.

Setting Up Checkpoint Bar Codes

Many organizations use bar codes to locate personal records at check-in. Each bar code is assigned a value that you can scan, so each check-in station should have a scanner handy for members to scan their cards and locate their personal records.

Bar codes are designed to print on on an ID card or key chain using Avery 6870 3/4" X 2 1/4" labels. Each label prints the bar code and name of the individual, and every person in ACS is automatically assigned a unique bar code. Bar codes can contain letters and numbers, but some older model scanners aren't able to scan them properly.

Scanner Compatibility

Bar codes can contain letters and numbers, but some older model scanners are not able to scan them properly. ACS Technologies can only guarantee that Checkpoint works with the scanners we currently sell.

Edit Individual Bar Codes

In Checkpoint, you can print bar codes on badges and use them to check in people to classes and activities. However, you can manually manage these bar code numbers. No two individuals can be assigned the same bar code number. If you enter a duplicate bar code number for a second individual, the next available bar code number is assigned to the first individual.

1. Under **Manage Records**, click the **People** tab.
2. In the drop-down list, select **Add/Edit Checkpoint** and click **Go**.
3. Under **Locate Individual**, enter the name of the person and press **Enter**.
4. Select the correct person, then click **Edit**.
5. Enter the new bar code number and click **OK**.

Print Bar Code Labels

To implement bar codes as part of your check-in system, print bar code labels, and put them on ID cards or key fobs. Then use the bar codes to locate individual's records at check-in.

Bar code labels in Checkpoint are designed to print on Avery 6870 3/4" X 2 1/4" Return Address Labels. Each label prints with the bar code and name associated with the corresponding individual record. The format of the name that prints on the label depends on the display name selected under Global Settings. Labels are sorted alphabetically according to last name, first name.

1. Under **Searches and Reports**, click the **Reports** tab.
2. In the drop-down list, select **Checkpoint Reports** and click **Go**.
3. In the left pane, expand **Labels** > **Bar Code Labels**.
4. In the lower left pane, click **Customize**.
5. In the **Master Group** drop-down list, select the master group that includes the people you want to print bar code labels for.
6. Enter the **Date Range**.
7. Under **Report Settings** and **Report Options**, select the options you want to include in the report. See Additional Information for more on each option.
8. Click **Preview** to generate the report.
9. **Save** or **Print** the report.

Additional Field Information
In the Bar Code Labels report, the date range field is compared to the date added and date dropped fields (on an individual's record) to determine whether a label is included in the report. For example, if the value of the date dropped field associated with an individual record comes before the value entered for the date range field, the individual is not included in the report. **Select Groups** Narrow the results to specific groups within the master group. Click **Select** to designate the groups. **Filter** Select to set available fields as filters to tailor the information in the report. Click **Select** to create the filter. **Record Selection** Select the results to individuals of a particular record type. Click **Select** and designate the record type. **Include Deactivated Records** Prints bar code labels for inactive individuals as well as active individuals. **Use Last Search Results** Select this option to print bar code labels for only those in your last search results.

Setting Pager Numbers

If you use pagers as part of your check-in system, you may need to man your check-in stations with staff or volunteers who can assign numbers and pagers. If you prefer to provide self check-in stations, you may want to ask attendees to enter their cell phone numbers as their pager numbers so that staff members and volunteers can get in touch with them if necessary. See Pagers for more information on implementing pagers as part of your check-in system.

Info

Remember, only one pager number per family!

Auto-assign

Auto-assigning pager numbers saves you time. You can assign pager numbers for all families or just for those in your last search results. Families added to the database after assigning pager numbers will not be given a number automatically; you will need to assign one for them.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. In the left pane, click **Checkpoint Defaults**, then click **Assign Pager Numbers**.
4. Enter the beginning pager number. (The first number from which all the pager numbers are assigned.)
5. Select whether the pager numbers apply to all families or to only the families in your current search results.
6. Click **OK**.

Set the beginning pager number

If you're auto-assigning pager numbers, you must set the beginning pager number. For example, if your first available pager number is 200, this is the beginning pager number. The next pager number is 201, then 202, and so on.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. In the left pane, click **Checkpoint Defaults**.
4. Under **Beginning Pager Number**, enter the pager number you want to start assigning pager numbers from.
5. Click **Apply** > **OK**.

Manually assign

If you don't want to automatically assign pager numbers, you must manually assign them.

1. Under **Manage Records**, click the **People** tab.
2. In the drop-down list, select **Add/Edit Checkpoint** and click **Go**.
3. Under **Locate Individual**, enter the last name of the family and press **Enter**.
4. Select the family, then click **Edit**.
5. Enter the pager number or click **Next #** to enter the next available pager number.
6. Click **OK**.

Delete

From time to time, you may want to delete pager numbers and start fresh. For example, you might want to delete pager numbers as children grow up and are promoted to more advanced classes. Delete the pager numbers first, and then reassign them. You can delete pagers numbers for all families, the families of your current search results, or range of pager numbers.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. In the left pane, click **Checkpoint Defaults**.
4. Click **Clear Pager Numbers**.
5. Select to delete pager numbers from all families, the families of your current search results, or a range of pager numbers.
6. Click **OK**.

Setting Up Badges

Badges are a security measure that help you keep track of children in the congregation. Nursery workers, volunteers, and staff print badges for each child and parent. Badges are checked before children leaves to ensure that they leave with their authorized guardian. You can also print different ones for visitors and adults. Badges are optional and may only be necessary for younger children, but you decide what is best for your organization.

Customizing for Templates and Sessions

Once you have created a session or template, you can assign a badge template to it. This way, you can customize badges to suit your activities and classes. The badges you use for religious education might include the class name or the person's class position. That same information might be left off of the badges you use for youth group meetings or worship services.

Child Badges

The child security badge will include a unique security ID and the family's pager number, if assigned. Pager numbers can be preassigned, or entered on a day-by-day (or session-by-session) basis. See Pagers for more information. There are four lines of space for information and you can choose what information displays on those lines

Special Notes on Badges

- The note is where you would print any important information you may need to record. It may help a Sunday school teacher know that one student has a peanut allergy before she serves snacks. Others might use it to note medicine a child needs.
- Notes can be entered during assisted check-in, and they're automatically saved for future reference. You can also enter notes under someone's record on the profile tab using the Checkpoint Information icon.
- If the badge template contains the note field and a note is entered, it will print on the badge. You can only add or edit notes from assisted check-in or from a person's record in People Suite. You cannot add or edit notes from Express Check In.

Parent Badges

Parent badges contain the date, session, and child's security ID. One badge can include information for multiple children. If necessary, you can print extra badges for additional family members. For added security, children's names are *not* included on their parents' badges.

You can print a single or dual parent badge. The single parent badge is a traditional parent badge, offering one badge for one parent. However, the dual parent badge offers you a way to cut costs and waste by dividing the single badge into two – one for each parent. The badge is perforated to be split down the middle and shared by two parents. Visit Checkpoint Templates to learn more about printing multiple badge templates.

Creating Security Badge Templates

Security badges print with security ID numbers (IDs) that match the child's badge with the parent's so you can match each child with their parent(s) before they leave a class or event. Before printing security badges at check-in, you must create a security badge template which will indicate what information displays and the overall look of the badge. You can create and save a variety of security badge templates, and then assign them to specific sessions and templates. This lets you customize security badge templates for various scenarios. The required size for Checkpoint security badges is 2¼" x 4".

About Bar Codes

Bar codes must be assigned a line and don't display automatically on badges. However, security IDs and pager numbers display in the top right of the printed badge; they don't need an assigned line.

> **Required font sizes for Bar Code**
>
> Checkpoint security badges are 2¼" x 4". The bar code field on the Checkpoint Badges requires the following font sizes:
>
> - Dymo printers 24 point
> - Zebra printers 28 point
> - Brother printers 36 point

We suggest selecting either **Barcode** or **Code 39-Digits** for the font, but you may need to adjust this depending on the printer and scanner you use. If you use bar codes, you must manually enter a smaller font size for some of the other lines on the template so that all of the lines will fit on the badge.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. Under **Badge Design**, click the **Security** tab.
4. Under the badge design window, click **New**.
5. In the Badge Design window, select one of the four blank badge lines, then click **Select Field**.
6. In the drop-down list, select what information you want to appear on that line of the badge and click **OK**. See the Additional Field Information for more on each option.
7. Repeat these steps for each line, then click **Save**.
8. Enter the name of the badge template and click **OK**.

   > **Tip**
   >
   > To preview a badge design click , select **Screen**, and click **OK**.

Additional Field Information
Barcode Displays the unique identifying bar code of the individual. If you are printing bar codes on badges, the font size will affect the size of the bar code. **Class Position/Reserve List 1** In group setup for classes, reserve list 1 is always set to **class position**. In activity group setup, reserve list 1 is optional and may be customized for your needs. Selecting this field displays the person's information for the reserve list. For example, Mr. Mark Jones is the teacher for the 3 year-old Sunday school class. His class position/reserve list 1 displays as "teacher" on his badge for class. **Reserve List 2 – 5** In class and activity group setup, reserve lists are optional levels or categorization and may be customized for your needs. Selecting this field displays the person's information for the reserve list.

Managing Information on Child Security Badges

Security badges print with security ID numbers that match the children's badges with the parent's, care givers should make sure they match before a child leaves a class or event. As your organization continues to grow and change, it may be necessary to update your security badge settings. You can update what information displays on security badge templates at any time.

For child badges, you can select up to four fields to display. Usually, you want to display at least the child's name. We also recommend displaying the parent's name, location, and notes. Displaying location means that lost children are returned to where they need to be quickly and easily. Displaying notes notifies staff of children's special needs. (Displaying notes is only available for the last line of badges. You cannot display notes on the first through third lines.)

Required font sizes for Bar Code

Checkpoint security badges are 2¼" x 4". The bar code field on the Checkpoint Badges requires the following font sizes:

- Dymo printers 24 point
- Zebra printers 28 point
- Brother printers 36 poi

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. Under **Badge Design**, click **Security**.
4. Under the badge design window, click **Load**.
5. Select the badge template and click **OK**.
6. In the Badge Design window, select one of the four blank badge lines, then click **Select Field**.
7. In the drop-down list, select what information you want to appear on that line of the badge and click **OK**. See Additional Information for more on each option.
8. Repeat these for each line, then click **Save**.
9. Enter the name of the badge template and click **OK**.

You can update the look of existing security badges at any time. These instructions apply only to child security badges. See Managing the Look of Parent Security Badges for instructions on managing parent security badges.

To manage the look of a badge template, you must first navigate to the badge design window. Once you're there, you can display individual pictures, select fonts, manage alignment, and apply background images.
The individual pictures come from the **Pictures** tab on an individual's record.

Tip

To preview a badge design click, select **Screen**, and click **OK**.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. Under **Badge Design**, click **Security**.

4. Under the badge design window, click **Load**.
5. Select the badge template and click **OK**.
6. Customize the badge as needed:
   - To display individual pictures, select **Individual Picture**, then choose to place the picture in the top left or top right corner.
   - To select the font, click **Font**, then choose the font, style, size, and color you want.
   - To manage horizontal alignment, select **Left-Justify**, **Center**, or **Right-Justify**.
   - To manage vertical alignment, adjust the text in the **Line Offset** field.
   - To apply a background image, select **Background Image**, then **Import**. Navigate to the image and click **O pen**.
   - To select the security ID font, click the arrows next to **Security ID Font Size** until the font is correctly sized in the preview window.
   - If you use a barcode on your badge, we suggest using at least a 24-point font and selecting either **Barcode** or **Code 39-Digits** for the font (but you may need to adjust it depending on the printer and scanner you use).
7. When you finish customizing your badge, click **Save**, then **OK**.

Additional Field Information
Class Position/Reserve List 1 In group setup for classes, reserve list 1 is always set t**olass position** In activity group setup, reserve list 1 is optional and may be customized for your needs. Selecting this field displays the person's information for the reserve list. For example, Mr. Mark Jones is the teacher for the 3 year-old Sunday school class. His class position/reserve list 1 displays as "teacher" on his badge for class. **Reserve List 2 – 5** In class and activity group setup, reserve lists are optional levels or categorization and may be customized for your needs. Selecting this field displays the person's information for the reserve list.

Managing the Look of Parent Security Badges

When creating parent security badges, you can apply a background image, manage the font size, and manage which sessions are assigned to the custom parent security badge.

Apply a Background

Use a background image to add both a level of security and a touch of flair to your parent security badges. Please note that the background image applies to all assigned sessions. You cannot create and save parent badge templates, so only one background image can be used at a time for parent badges.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go** .
3. In the left navigation pane, click **Badge Design**.
4. Click the **Parent/Name** tab.
5. Under Parent Badge Options, click **Select Image**.
6. In the window, navigate to and select the image.
7. Click **Open**. The image is applied as the background.
8. Click **Apply**, then **OK**.

Manage the Font Size

You can change the font size of information on parent badges, and the font size applies to all assigned sessions. You cannot create and save parent badge templates, so only one font size can be used at a time for parent badges. **The maximum font size is 80. The recommended font size is around 25.**

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. In the left navigation pane, click **Badge Design**.
4. Click the **Parent/Name** tab.
5. Under Parent Badge Options, next to **Font Size**, click the arrows to increase or decrease the font size.
6. Once the font is sized to your preference, click **Apply**, then **OK**.

Manage Parent Badge Assigned Sessions

You can customize the font size and background image of parent badges to suit the tone of your organization. Parent badge settings apply to all assigned sessions. You cannot create or save templates for parent badges. Therefore, you may need to manage what sessions are assigned the customized parent badge settings.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. Under **Badge Design**, click the **Parent/Name** tab.
4. Under **Name Badge Options**, click **Assign to Sessions**.
5. Select the sessions you want to apply the parent badge settings to, and clear the ones you don't.
6. Click **Save**.
7. Click **Apply**, then **OK**.

Combined Sessions Badges

Use combined sessions badges to print fewer badges. Instead of printing two separate security badges for children who attend both Sunday school and worship each week, print one combined sessions badge for each child. You can also customize the look of combined sessions badges to suit the tone of your organization. These settings automatically apply to all combined sessions badges.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. Under **Badge Design**, click the **Combined Sessions** tab, then click **Load**.
4. Select the badge template and click **OK**.
5. Customize the badge as needed:

- To display individual pictures, select **Individual Picture**, then choose to place the picture in the top left or top right corner.
- To select the font, click **Font**, then choose the font, style, size, and color you want.
- To manage horizontal alignment, select **Left-Justify**, **Center**, or **Right-Justify**.
- To manage vertical alignment, adjust the text in the **Line Offset** field.
- To apply a background imagine, select **Background Image**, then **Import**. Navigate to the image and click **Open**.
- To select the security ID font, click the arrows next to **Security ID Font Size** until the font is correctly sized in the preview window.

6. When you finish customizing your badge, click **Save**, then **OK**.

> **Tip**
>
> To preview a badge design click , select **Screen**, and click **OK**.

Select what information displays about people on their combined sessions badges. These settings automatically apply to all combined sessions badges. Bar codes must be assigned a line and don't automatically display on badges. Security IDs and pager numbers display in the top right of the printed badge and don't require an line to be assigned to them.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. Under **Badge Design**, click the **Combined Sessions** tab.
4. In the Badge Design window, select one of the four badge lines.
5. Click **Select Field**.
6. In the drop-down list, select what information you want to appear on that line of the badge and click **OK**.
7. Repeat these steps for each line, then click **Save** and OK.

> **Tip**
>
> To preview a badge design click , select **Screen**, and click **OK**.

Visitor Badges

In Checkpoint Setup, you can design check-in badges for one-time visitors. Visitor badges display security IDs and pager numbers like regular security badges. You can further customize visitor badges to look just like member's security badges so that visitors fit in, or you can design them so that they stand out. You cannot create multiple visitor badges templates, so we recommend designing a template that works well in multiple scenarios.

Note

- The visitor badge template determines what information is collected from one-time visitors at check-in. If you want to use visitor badges for children, we recommend selecting **Parent Name** as one of the badge fields.
- Since you cannot set up bar codes ahead of time for visitors, bar codes are not available for visitor badges.

Customize a Visitor Badge

You can update the look of your visitor badges' at any time. You can customize visitor badges to look just like security badges so that visitors fit in, or you can design them so that they stand out. You cannot create multiple visitor badges templates, so we recommend designing a template that works well in a variety of scenarios.

Tip

To preview a badge design click , select **Screen**, and click **OK**.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. Under **Badge Design**, click the **Visitor** tab.
4. Under the badge design window, click **New**.
5. In the Badge Design window, select one of the four blank badge lines, then click **Select Field**.
6. In the drop-down list, select what information you want to appear on that line of the badge and click **OK**.
7. Repeat these steps for each line.
8. Click **Save**, then **OK.** (You cannot change the name of the default visitor badge.)

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. Under **Badge Design**, click the **Visitor** tab.
4. Under the badge design window, click **Load**.
5. Select the badge template and click **OK**.
6. Customize the badge as needed:

- To display individual pictures, select **Individual Picture**, then choose to place the picture in the top left or top right corner.
- To select the font, click **Font**, then choose the font, style, size, and color you want.
- To manage horizontal alignment, select **Left-Justify**, **Center**, or **Right-Justify**.
- To manage veritical alignment, adjust the text in the **Line Offset** field.
- To apply a background imagine, select **Background Image**, then **Import**. Navigate to the image and click **Open**.
- To select the security ID font, click the arrows next to **Security ID Font Size** until the font is correctly sized in the preview window.

7. When you finish customizing your badge, click **Save**, then **OK**.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go** .
3. Under **Badge Design**, click the **Visitor** tab.
4. Under the badge design window, click **Load**.
5. Select the badge template and click **OK**.
6. In the Badge Design window, select one of the four blank badge lines, then click **Select Field**.
7. In the drop-down list, select what information you want to appear on that line of the badge and click **OK**.
8. Repeat these for each line.
9. Click **Save**, then **OK**.

Name Badges

Name badges are blank badges with the individual's name and are designed for adults in non-security situations. You can customize the font size and background image of name badges to meet your organization's needs. These name badge settings apply to all assigned sessions. You cannot create or save templates for name badges, so you may need to manage which sessions are assigned the customized name badge settings.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. Under **Badge Design**, click the **Parent/Name** tab.
4. Under **Name Badge Options**, click **Assign to Sessions**.
5. Select the sessions you want to apply the name badge settings to and clear the sessions you don't want to apply the settings to.
6. Click **Save**.
7. Click **Apply**, then **OK**.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. In the left pane, click **Badge Design**.
4. Click the **Parent/Name** tab.
5. Under Name Badge Options, next to **Font Size**, click the up and down arrows to increase or decrease the font size.
6. Once the font is sized to your preference, click **Apply**, then **OK**.

Applying a Background to Name Badges

Use a background image to add a level of security and a touch of flair to your name badges. Selecting a background image for names badges applies to all assigned sessions. You cannot create and save name badge templates, so only one background image can be used at a time for name badges.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. In the left pane, click **Badge Design**.
4. Click on the **Parent/Name** tab.
5. Under **Name Badge Options**, click **Select Image**.
6. In the window, navigate to and select the image.
7. Click **Open**. The image is applied as the background.
8. Click **Apply** then **OK**.

Printing Security Badges in Bulk

To prepare for an event, you can print security badges in bulk ahead of time. This is especially helpful if you're holding an event where you know who is attending. The badges can be ready for the attendees at registration.

> ⚠ **Note**
>
> Badges do not print for people who were dropped from a group or event.

1. Under **Searches and Reports**, click the **Reports** tab.
2. In the drop-down list, select **Checkpoint Reports** and click **Go**.
3. In the left pane, expand **Labels**, then **Security Badges**.
4. In the lower left pane, click **Customize**.
5. Select the print date.
6. On the **Report Options** tab, under **Session**, in the drop-down list, select the session you want to print security badges for.
7. Under **Report Settings** and **Report Options**, select the options you want to include in the report. See Additional Information for more on each option.
8. Under **Date Range**, enter the start date of the report.
9. Click **Preview** to generate the report.

Additional Field Information

Select Groups
Narrow the results to specific groups within the master group. Click **Select** to designate the groups.

Filter
Select to set available fields as filters to tailor the information in the report. Click **Select** to create the filter.

Record Selection
Select the results to individuals of a particular record type. Click **Select** and designate the record type.

Include Deactivated Records
Prints badges for inactive individuals as well as active individuals.

Include All Family Positions
Select to print badges for anyone enrolled in the selected session regardless of family position. When this option is not selected, only the family positions selected in session setup will print.

Print Parent Badge
Prints the matching parent badge for every child security badge. When this option is cleared, only child security badges print.

Setting Up Security IDs

Security IDs

With the exception of name badges, all badges printed using Checkpoint display a security ID number in the top right corner. The security ID is a randomly-generated, unique identifying number that consists of both numbers and letters. Any changes you make to security IDs apply to all badges.

Security IDs are designed primarily with children in mind. You print badges for children and parents with a matching security ID. Then, the badges are checked before the child leaves, and, consequently, the risk of a child leaving with an unauthorized individual is greatly reduced.Use individual IDs to display a different security ID for each family member. Use family IDs to display the same security ID for all family members. You can also set the number of characters you want to use in your security IDs.

Clearing Security IDs

Clearing security IDs is a security precaution. It deletes all records of what families and individuals were assigned to what security IDs. It also deletes records more than one month old.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. In the left pane, click **Checkpoint Defaults**.
4. Under **Security IDs**, click **Clear Security IDs**.
5. Click **Yes**, then **OK**.

Setting Security IDs for Families

Use family IDs to display the same security ID for all members of a family. When you use family IDs, you can also select either an individual parent badge or a dual parent badge. Selecting **individual parent badge** means that a separate badge prints for each parent, as per normal. A **dual parent badge** is one badge that can be torn into separate badges for each parent. You must buy special paper to print dual parent badges. Visit our online store to purchase supplies. Otherwise, we cannot guarantee that your badges print correctly.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. In the left pane, click **Checkpoint Defaults**.
4. Under **Security IDs**, select **Family ID**.
5. Select either **Individual Parent Badge** or **Dual Parent Badge**.
6. Click **Apply**, then **OK**.

Setting Security IDs for Individuals

You can provide extra protection for children by selecting the **Family ID** and **Individual Parent Badge** optio ns. When these options are set together, it prevents an unauthorized adult from checking out a child from a kiosk, printing a parent security badge, and then picking up the child.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. In the left pane, click **Checkpoint Defaults**.
4. Under **Security IDs**, select **Individual IDs**.
5. Click **Apply**, then **OK**.

Setting the Character Length of Security IDs

The character length of security IDs applies to all badges immediately. Family security IDs consist of three characters and cannot be changed. Individual security IDs can be between 5 to 10 characters.

> **Fonts and Character Lengths**
>
> If you set security IDs to print as font size 13 or larger, set the character length to 8 or less. Security IDs longer than 8 characters and over font size 12 will not fit on printed badges.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. In the left pane, click **Checkpoint Defaults**.
4. Under **Security IDs**, enter the number of characters.
5. Click **Apply**, then **OK**.

Entering Individual Notes for Badges

Using Checkpoint, you can display special notes about an individual on badges. Use notes primarily for children's special needs or notifications. For example, if a child has a peanut allergy, the parents can make a note of that during assisted check-in and, if the badge template is set to display notes, it prints on the child's badge.

For notes to display on printed badges, you must select **Note** as the last line on the badge template.

You can enter notes during assisted check-in, and staff members can modify them at any time. Notes are saved for future use. You can also enter notes on a person's record in people using the Checkpoint Information Icon on the Profile tab.

1. Under **Manage Records**, click the **Involvement** tab.
2. In the drop-down list, select **Check In/Out** and click **Go**.
3. Select the appropriate printer, posting date, and session. Click **OK**.
4. Locate the individual.
5. Under the individual's name, click **Add Note**.
6. Enter the note and click **OK**.
7. If a note already exists for an individual and you want to change it, click on the note to edit it, then click **OK**.

Tip

You can also add notes for new individuals and visitors. For one-time visitors, click on **One-time Visitor** to enter the individual's name and Note. For new individuals that you want to add to the database, you can choose either **Quick Add** or **Add New Family**. After you enter the individual's information and select the class and general fields, you can click on **Add Note** to enter the note you want to print on the badge.

1. Under **Manage Records**, click the **People** tab.
2. In the drop-down list, select **Add/Edit Checkpoint** and click **Go**.
3. Under **Locate Individual**, enter the name of the person and press **Enter**.
4. Select the individual and click **Edit**.
5. Click the **Checkpoint Information** icon.
6. Under **Individual's Note**, enter the note and click **OK**.

Global Checkpoint Settings

Most global settings act as defaults. (A default is an option that selected before the user starts to use a program. In Checkpoint, you can select and manage many defaults to suit your organization's needs.)

In general, global settings do not change templates and sessions that have already been added; they only affect newly-created ones. However, there are some global settings that override all sessions and templates. Global settings:

- Apply to assisted and self-check-in.
- Are automatically applied to all templates and sessions.

- Cannot be changed for specific sessions or templates.

Overview of Global Settings

Global settings are helpful when you're setting up Checkpoint for the first time. Consider what settings you want all of your sessions and templates to have in common, and then manage your global settings accordingly. This way, you don't have to change the settings of each session and template repeatedly. You can also use global settings to give other users the permissions to add new templates and sessions, while still controlling the settings for them. This keeps your templates and sessions professional, consistent, and under your control, while still allowing you to delegate the task of creating templates and sessions. To change Checkpoint global settings, you must have user rights to **Add/Edit Checkpoint Defaults**

Managing Global Settings

Global settings are built into Checkpoint to help you with attendance, profiles, and to make check-in more efficient. These defaults are global settings and are overridden by settings in templates. These defaults do not change currently existing templates; they only affect newly-created ones.

Set the Check-in Grace Period

Improve the accuracy of your attendance records by setting the check-in grace period This establishes how much time between check-in and check-out must exist for a person to be counted as present.

> **For Example**
>
> If a mother checks her child in at 9:51 am, and checks the child out at 10:00 am when he becomes ill, if your check-in grace period is set at 10 minutes, the mother and child are not recorded as present on that day.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. In the left pane, click **Check In/Out Defaults**.
4. Under **Check In Grace Period**, select a time frame in the drop-down list.
5. Click **Apply** to save your changes.

Set the Session Statistics Auto Refresh Time

Let multiple check-in stations know when a session is full, or if a teacher calls in sick by setting the Session Statistics Refresh Time. This is very helpful when you have several stations simultaneously checking people in.

Unposted Attendance & Saving a Session

If you have any unposted attendance markings for a session, you'll be prompted to *clear* the unposted markings when saving the session changes.
Click **No** if you want to post the attendance markings, and return to editing the session.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. In the left pane, click **Checkpoint Defaults**.
4. Under **Session Statistics Refresh Time**, select the time frame in which you want the sessions statistics window to refresh automatically. Select **O** if you want to refresh it manually.
5. Click **Apply**, then **OK**.

Manage the Default Information of New People

When you add new people to ACS as they check-in, you choose the default information you'll want to set. For example, when adding new people through Checkpoint, if you want them to receive a newsletter by email, you would select Default Newsletter as either **Individual** or **Family** and Default Deliver By as **E-mail**.

Changing these defaults, doesn't alter any people records, or any new records added through Checkpoint. The settings can be the same as or different than the defaults in People. However, if you assign Record Types to Member Statuses in People setup, these are used when adding new people through Checkpoint.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. In the left pane, click **Add People Defaults**.
4. Under People Defaults, select the default information of new people added through Checkpoint.
5. Click **Apply** to save your changes.

Display Other Relationship Types During Check-in

By default, Checkpoint displays the head, spouse, and children of a family when any member of a family is checking in. In ACS People, you can record the relationships individuals have with people outside of their family. With check-in, the relationship would typically be an "Authorized Pickup Adult" or an "Authorized Pickup Child." These relationship types indicate that parents have authorized someone else to check their child out. To make check-in quicker, you can display these other relationships with a family during check-in.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. In the left pane, click **Checkpoint Defaults**.
4. Under **Other Relationships**, click **Select Relationships**.
5. In the window, select the relationship types you want to include, then click **OK**.
6. Click **Apply** to save your changes.

Display Names: Custom, Formal, or Informal?

You can use formal or informal label names from ACS or create a custom display name. The Checkpoint display name controls how names display in Checkpoint windows and reports. Display name options do not affect how you use names to locate information at check-in.

1. Under **Advanced Tools**, select the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. In the left navigation pane of the Setup window, click **Name Options**.
4. In the drop-down list, select **Custom Label Name**.
5. Select the segments of people's names that you want to display.
6. Click **Apply** to save your changes.

> **Tip**
>
> Formal names display as title, first name, last name, suffix. For example, **Dr. James Aaron, Sr**.

1. Under **Advanced Tools**, select the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. In the left pane, click **Name Options**.
4. In the drop-down list, select **Formal Label Name**.
5. Click **Apply** to save your changes.

> **Tip**
>
> Informal names display with the Goes By name or first name, if no Goes By exists, then last name and suffix. For example, **Jim Aaron, Sr**.

1. Under **Advanced Tools**, select the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. In the left pane, click **Name Options**.
4. In the drop-down list, select **Informal Label Name**.
5. Click **Apply** to save your changes.

Allow Automatic Badge Printing

Allow automatic badge printing so that members and staff don't have to manually print badges each time they check-in. Once selected, staff can choose what type of badges to print automatically when they prepare each check-in station.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. In the left pane, click **Check In/Out Defaults**.
4. Under **Check In/Out Options**, select **Allow Automatic Badge Printing**.

5. Click **Apply**, then **OK**.

Set or Clear the Check-in Menu Password

> **Passwords for Touchscreens**
>
> If you're using touchscreen computers for any of your check-in stations, you must select a password without numbers. The on-screen keyboard includes only lower and uppercase letters, a period, a comma, a hyphen, and an apostrophe. The password can consist of only these characters.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. In the left pane, click **Check In/Out Defaults**.
4. Under **Check In/Out Password**, enter the new password and click **Apply**.
5. Enter the password again to confirm it, then click **OK**.
6. Click **Apply** again to save the new password.

> **Not Recommended**
>
> We do not recommend clearing the CheckIn/Out Password. Clearing the check-in password makes your check-in computers vulnerable to unauthorized users accessing your ACS data.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. In the left pane, click **Check In/Out Defaults**.
4. Under **Check In/Out Password**, delete the old password and click **Apply**.
5. Enter the previous password, then click **OK**.
6. Click **Apply**.

Set the Check-in Screen Clear Times

The clear time affects how long people have to read the check-in confirmation message, and how much time is required between when one person checks in and when the next person can start checking in.

The standard screen clear time is 5 seconds. This is usually enough time for users to read the confirmation message and not so much time that it delays the stream of people checking in. You can decrease the time if you want to speed up check-in time. Or, you can increase it if you think it is not enough to read the confirmation message. You can set the time to a maximum of 30 seconds.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. In the left pane, click **Check In/Out Defaults**.
4. Under **Check In/Out Complete Screen Clear Time**, enter the number of seconds.

5. Click **Apply** to save your changes.

Manage the "Locate By" Defaults

Use Locate By defaults to control what information is used to locate people records during check-in. You can locate records by variations of individuals' names, the last four digits of phone numbers, by bar codes, or by pager numbers.

> **Security Considerations**
>
> For security reasons, individuals must provide **Locate By** information to check-in. Depending on your organization's security needs, you may want to provide more **Locate By** options, including people's names and phone numbers, or you may want to tighten security by only allowing pager numbers or bar codes.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. In the left pane, click **Check In/Out Defaults**.
4. Manage the **Check In/Out Locate Options** to your preference.
5. Click **Apply** to save your changes.

Managing Assisted Check-in Defaults

Global settings for assisted check-in stations include Quick Add options for new people, what personal information displays at check-in, badge printing options, and more. Use defaults to customize the options available to staff as they check in members and guests.

> If this is your first time setting up Checkpoint, these defaults are global settings that will apply to any templates or sessions you create hereafter. This makes it easy to quickly set up templates and sessions with a consistent design and options. These defaults apply only to assisted check-in stations. To learn about managing self check-in defaults, see Managing Self Check-in Defaults.

Security Considerations

Be aware of what sensitive information staff and volunteers will have access to when they check people in. You control and select:

- the information that displays what
- information is used to look people up the
- check-in password the check-in screen
- clear time, and more

Add People Defaults

You can use Checkpoint to easily add visitors' contact information to your ACS data. Depending on how rushed your check-in period is, you may want to collect more (or less) information from visitors. If visitors come without a member accompanying them, then they need to check in at an assisted check-in station. These instructions detail how to set defaults for assisted check-in stations. View instructions on setting defaults for visitors who are accompanied by members.

New people can be added as members of a family already entered in ACS or as a brand new family in ACS. Use defaults to customize the options available to staff as they check members and guests in.

To manage what information is collected from visitors at assisted check-in:

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, click **Checkpoint** and click **Go**.
3. In the left navigation pane, click **Add People Defaults**.
4. Under **Check In/Out Quick Add Options**, select the information that you want to be collected.
5. Click **Apply** to save your changes.

Managing Self Check-in Defaults

Global settings for self check-in stations include the default color scheme, messages that display during check-in, options for adding new people, how to locate records, and more. Use defaults to customize the look and function of your self check-in stations and make the check-in process smoother for your members.

> If this is your first time setting up Checkpoint, these defaults are global settings that will apply to any templates or sessions you create hereafter. This makes it easy to quickly set up templates and sessi ons with a consistent design and options. These defaults apply only to self check-in stations. To learn about managing assisted check-in defaults, see Managing Assisted Check-in Defaults.

Add People Defaults

Members bring new people to events, classes, and worship services all the time. You can use Checkpoint to easily add visitors' contact information to ACS. You can add new people as members of a family already entered in ACS or as a new family.

Depending on how rushed your check-in period is, you may want to request more or less information from visitors. Use Checkpoint defaults to control how much and what information is collected from visitors. If visitors are accompanied by a member, then the member can simply add the visitor at self check-in. These instructions detail how to set defaults for self check-in stations. View instructions on setting defaults for visitors who are unaccompanied.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. In the left pane, click **Add People Defaults**.

4. Under **People Defaults**, select the defaults you want for each item. See Additional Information for more on each option.
5. Under **Express Check In/Out Add People Options**, select the information that you want to be recorded. See Additional Information. for more on each option.
6. Click **Apply**, then **OK**.

Default Images

You can use images to promote events such as an Easter Sunday egg hunt, or to match the theme of sessions, like Sunday School or Awana. Because the keyboard area takes up the right side of the check-in window, we recommend that the image occupies only the left side of the window. For example, you could display a vertical banner that features your organization's logo or promotes your latest event.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**.
3. In the left pane, click **Check In/Out Colors**.
4. Under Express Check In/Out Global Image, click **Browse** .
5. In the window, navigate to and select the image, then click **Open**.
6. To preview how the image will appear on check-in stations, click **Preview**.
7. Click **Apply** to save your changes.

Checkpoint Sessions

Sessions designate the Checkpoint settings for all the groups they include. Before you can start checking people in, you must create Checkpoint sessions. Use Checkpoint sessions to check people in and out of events, activities, and classes. A session is usually an Access ACS small group, an activities master group, or an attendance master group coupled with a particular event.You must have sessions entered in Checkpoint to check people in.

Setting up Checkpoint Sessions is one of the last steps you need to do before using Checkpoint. Before you set up sessions, make sure you have:

- Designed a Checkpoint check-in system for your organization
- Entered your current membership, staff, and prospective members into ACS People.
- Integrated your ACS Groups by entering all of your groups and enrolled everyone attending in the groups. Set your Global Settings and Checkpoint defaults.

> If you have any unposted attendance markings for a session, you'll be prompted to *clear* the unposted markings when saving the session changes.
> Click **No** if you want to post the attendance markings, and return to edit the session.

Manage Sessions

1. Under **Advanced Tools**, click the **Settings** tab.

2. In the drop-down list, select **Checkpoint Sessions** and click **Go**.
3. In the Sessions window, click **Add**. The Session Setup window displays.
4. Enter a **Name** for the session.
5. Select the **Master Group** of the session.
6. Select the Event for the session.
7. Select any additional options you want for this session.
8. To save the session and use it to check in people, click **OK**.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint Sessions** and click **Go**.
3. Select the session and click **Delete**.
4. Click **OK**.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint Sessions** and click **Go**.
3. In the Sessions window, select the session.
4. Click **Edit**. The Session Setup window displays.
5. Edit the session to your preference.
6. Click **OK**.

Manage Sessions included in Templates

Use templates to control the settings of related Checkpoint sessions. Just like groups are contained within a session; sessions can be contained within a template. Templates designate the default settings for the sessions they include. Templates alone cannot be used for check-in, they must include designated sessions. When you create a new template, the settings default to your current global settings, unless you change them specifically for the template. Template settings override global settings.

To manage the sessions included in a template, first navigate to the template setup. Once you have navigated to the template, you can manage the sessions included in it. Sessions listed under **Selected Sessions** are included in the template. You can add or remove sessions from the **Selected Sessions** list.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint Templates** and click **Go**.
3. Select the template and click **Edit**.
4. In the left pane, click **Sessions**.

1. Under **Available Sessions**, select a session you want to include in the template.
2. Click . This adds the session to the Selected Sessions list.
3. Repeat steps 1-2 for each session you want to add.

4. Click **Apply** to save your changes.

1. Under **Selected Sessions**, select a session you do not want to include in the template.
2. Click . This removes the session from the Selected Sessions list.
3. Repeat steps 1-2 for each session you want to remove.
4. Click **Apply** to save your changes.

Hide Sessions

If you use a template that applies to multiple sessions and you want people to check-in with the template settings you previously selected, you can hide sessions so that only templates display during check-in. You cannot hide templates for check-in station setup, only sessions.

1. Under **Advanced Tools**, click **Settings** tab.
2. In the drop-down list, select **Checkpoint** and click **Go**
3. In the left pane, click **Checkpoint Defaults**.
4. Under **Template Display Options**, select **Display Templates Only**.
5. Click **Apply**, then **OK**.

Checkpoint Templates

When you manage the settings of related Checkpoint sessions together, templates can be a huge time saver.

Just like groups that are contained within a session, sessions can be contained within a template. Templates control the default settings for the sessions they manage. When you create a new template, the settings default to your current global settings, unless you specifically change them for the template.

Templates alone cannot be used for check-in; they must include designated sessions.

Multiple Badge Templates

You can create and save a variety of security badge templates and assign them to different Checkpoint templates and sessions.

- Your children's Sunday school template can be applied to the check-in template called "Sunday School."
- You can also create a badge template for Wednesday night children's choir and apply it to another check-in template called "Wednesday Night Music."
- The two badge templates may display different information about children, or they may just have a different look to distinguish them.

Managing Templates

Use templates to control the settings of related Checkpoint sessions. Just like groups are contained within a session; sessions can be contained within a template. Templates designate the default settings for the sessions they include. Templates by themselves cannot be used for check-in. Templates must include designated sessions. When you create a new template, the settings default to your current global settings, unless you change them specifically for the template. Template settings override global settings.

To create a new template, first navigate to template setup. Then, select the sessions that are included in the template.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint Templates** and click **Go**.
3. Click **Add.** (You can also create a new template by copying another one.) 4. Enter the name of the new template.

1. In the left pane, click **Sessions**.
2. Under **Available Sessions**, select a session you want to include in the template.
3. Click . This moves the session to the list of ones included in the template.
4. Repeat steps 2-3 for each session.
5. Under **Badge Settings**, choose if you want to print combined session badges, and the badge types to automatically print.
6. Under **Service**, choose the service in which you want to use this template and click **Apply** to save your changes.
7. Once you have selected the sessions, you can manage the other template settings.

Deleting a template does not delete the sessions included in the template. However, the settings that were applied to those sessions through the template no longer apply after the template is deleted.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint Templates** and click **Go**.
3. Select the template.
4. Click **Delete**, then **Yes**.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint Templates** and click **Go**.
3. Select the template and click **Edit.**
4. Once you have navigated to the template, you can manage its settings. Select a topic below for instructions on how to apply the settings to your template.

Use Locate By Options

When members or repeat visitors check-in, they must have a way to locate their records in your ACS dataset. Use Locate By options to control what information is used to locate people records during checkin. You can choose to locate records by variations of individuals' names, the last four digits of phone numbers, by bar codes, or by pager numbers.

> **Security Considerations**
>
> For security reasons, people must provide Locate By information in order to check-in. Depending on your security needs, you may want to provide more Locate By options, including people's names and phone numbers, or you may want to tighten security by only allowing pager numbers or bar codes.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint Templates** and click **Go**.
3. Select the template, then click **Edit**.
4. In the left pane, click **Check In/Out Defaults**.
5. Manage the **Check In/Out Locate Options** to your preference. See the Additional Field Information for more on each option.
6. Click **Apply** to save your changes

Set Screen Clear Time for Templates

The clear time affects how long people have to read the check-in confirmation message, and how much time is required between when one person checks in and when the next person can start checking in.

The standard screen clear time is 5 seconds. This is usually enough time for users to read the confirmation message and not so much time that it delays the stream of people checking in. You can decrease the time if you want to speed up check-in time. Or, you can increase it if you think it is not enough to read the confirmation message. You can set the time to a maximum of 30 seconds.

The standard screen clear time is 5 seconds. This is usually enough time for users to read the confirmation message and not so much time that it delays the stream of people checking in. You can decrease the time if you want to speed up check-in time. Or, you can increase it if you think it is not enough to read the confirmation message. You can set the time to a maximum of 30 seconds.

Setting the check-in screen clear time controls how long the check-in confirmation message displays before resetting to the start menu.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint Templates** and click **Go**.
3. Select the template and click **Edit**.
4. In the left pane, click **Check In/Out Defaults**.
5. Under **Check In/Out Complete Screen Clear Time**, enter the number of seconds.
6. Click **Apply** to save your changes.

Managing Templates at Assisted Check-in

When newcomers visit your organization, you can use Checkpoint to easily add visitors' contact information to your ACS data.

Depending on how rushed your check-in period is, you may want to collect more or less information from visitors. Use Checkpoint fields to control how much and what information is collected from visitors. If visitors come without a member accompanying them, then they need to check in at an assisted check-in station. These instructions detail how to set defaults for assisted check-in stations.

Add People Fields

You can add new people as members of a family already entered in ACS or as a new family. These fields apply to people entered in both ways.

To manage information collected from visitors at assisted check-in:

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint Templates** and click **Go**.
3. Select the template and click **Edit**.
4. In the left navigation pane, click **Add People Defaults**.
5. Under **Check In/Out Quick Add Options**, select the information that you want to be collected.
6. Click **Apply** to save your changes.

Managing Templates at Self Check-in

Members bring new people to events, classes, and worship services all the time. You can use Checkpoint to add visitors' contact information to your ACS dataset.

Depending on how rushed your check-in period is, you may want to request more or less information from visitors. Select which information fields display in Checkpoint to control how much and what information is collected from visitors. If visitors are accompanied by a member, then the member can add the visitor at self check-in. These instructions detail how to manage fields for templates and self check-in stations.

Add People

New people can be added as members of a family already entered in your ACS dataset or as a brand new family in your ACS dataset. These fields display for people entered in both ways.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint Templates**, then click **Go**.
3. Select the template and click **Edit**.
4. In the left pane, click **Add People Defaults**.
5. Under **Express Check In/Out Add People Options**, select the information that you want to be collected. See the Additional Field Information for more on each option.
6. Click **Apply** to save your changes.

Template Colors

Customize the look of your check-in stations by managing the self check-in color scheme. You can use the global color scheme designated in Checkpoint setup, or you can customize the color scheme for a specific template.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint Templates** and click **Go**.
3. Select the template and click **Edit**.
4. In the left pane, click **Check In/Out Colors**.
5. Clear **Use Colors from Checkpoint Setup**.
6. Beside **Header**, click **Select**.
7. Select the color for the header, or click **Define Custom Colors** to design a new color.
8. Repeat these steps for **Borders** and **Background**. The colors preview in the window so you can see how they look together.
9. When finished, click **Apply** to save your changes.

> **Preset color schemes**
>
> Select preset color schemes by clicking **Select Default Color Scheme**. Preset colors schemes are available in shades of blue, red, purple, green, or yellow. Additional Checkpoint color and image themes are available for download in the Client Portal.

Template Images

In templates, you can use the default self check-in image from Checkpoint Setup. Or, you can apply a different image to templates.

> **Image size suggestion**
>
> Because the keyboard area takes up the right side of the check-in window, it is usually best that the image occupies only the left side of the window.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint Templates** and click **Go**.
3. Select the template and click **Edit**.
4. In the left pane, click **Check In/Out Colors**.
5. Under Express Check In/Out Global Image, clear **Use Image from Checkpoint Setup**.
6. Click **Browse**.
7. In the window, navigate to and select the image, then click **Open**.
8. To preview how the image will appear at check-in stations, click **Preview**.
9. Click **Apply** to save your changes.

Customizing Images for Self Check-in

You can customize your check-in screen with images you create, or use one of our pre-designed seasonal or ministry themes. Custom images display to the left side of the Express Check In/Out screens, and are handy for advertising upcoming events or displaying the church's logo and vision. You can use your choice of image editing software as long as you save them to the correct sizes and file types.

To resize your check-in image, you must first determine the recommend image size for your monitor.

Screen Resolution in pixels (w x h)	Recommended Image Size in pixels (w x h)
1024 x 768	185 x 736
1152 x 864	209 x 835
1280 x 1024	232 x 995
1280 x 800	232 x 771
1280 x 960	232 x 931
1680 x 1050	304 x 1021

After you resize the image, you can import it into Checkpoint. Then, depending on how your Checkpoint sessions and templates are set up, you may want to use the image for specific sessions and templates, (or all of them).

- If some sessions already have an image on file, setting a global image will not affect those sessions.
- Global image changes only affect sessions with no designated image on file.
- Setting an image for specific sessions or templates also removes any previously assigned global images.

Pre-designed Themes

You may also want to explore the pre-designed seasonal and ministry themes available in our Checkpoint Themes Gallery. To select a pre-designed theme, log in to the client portal and download the **Checkpoint Themes** file.

1. On the computer and monitor that you plan to use for check-in, open ACS People Suite.
2. Under **Advanced Tools**, click the **Settings** tab.
3. In the drop-down list, select **Checkpoint** and click **Go**.
4. In the left pane, click **Check In/Out Colors**.
5. Under **Express Check In/Out Global Image**, the recommended image size is listed.
6. To resize the image, use an image editing program to open the image file.
7. Enter the recommended pixel width and height.
8. Save the image.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down lists, select **Checkpoint** and click **Go**.
3. In the left pane, click **Check In/Out Colors**.
4. Under **Express Check In/Out Global Image**, click **Browse**.
5. In the window, navigate to and select the image, then click **Open**.
6. To preview the image, click **Preview**.
7. Click **Apply** to save your changes.
8. Open Checkpoint Express Check In/Out to verify that your changes saved correctly.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down lists, select **Checkpoint Sessions** and click **Go**.
3. Select the session you want to apply an image to, and click **Edit**.
4. Under **Select Image**, click **Browse**.
5. In the window, navigate to and select the image, then click **Open**.
6. To preview the image, click **Preview**.
7. Click **Apply** to save your changes.
8. Open Checkpoint Express Check In/Out to verify that your changes saved correctly.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint Templates** and click **Go**.
3. Select the template and click **Edit**.
4. In the left pane, click **Check In/Out Colors**.
5. Under **Express Check In/Out Global Image**, clear **Use Image from Checkpoint Setup**.
6. Click **Browse**.
7. In the window, navigate to and select the image, then click **Open**.
8. To preview the image, click **Preview**.
9. Click **Apply** to save your changes.
10. Open Checkpoint Express Check In/Out to verify that your changes saved correctly.

Checking In and Out

Once you've implemented Checkpoint as part of your check-in system, configured all of your Checkpoint settings, and created sessions and templates you're ready to start checking people in!

Whether it's once a week or once a day, each time you check people in, you must prepare the check-in stations. Once you've prepared the check-in stations, you can begin checking in people. As people are checking in, you can watch the Sessions Statistics to see how sessions are filling up and who is attending.

Adding New People During Check-in

When new people show up to attend events, classes, and worship services, you can use Checkpoint to easily add newcomers' contact information to your ACS data set. This helps you to follow-up with visitors later, improve your outreach, and grow your organization over time. Sometimes these new people are the immediate family of current members. Other times, new people are friends or distant relatives.

Add Additional Family Members

Newcomers might attend by themselves (assisted check-in), or they may be accompanied by their family (self check-in). If a newcomer is accompanied by family members, the family can add the newcomer's information at self check-in station. To do this, navigate to the **Express Check In/Out Options** > **Check/In Out Defaults** > select **Display Options for Adding New People**. If new family members are unaccompanied, they will need to check-in at an assisted check-in station. Staff and volunteers manning assisted check-in stations need to be familiar with this process of adding additional family members during check-in.

Immediate Family Only

Only add new people if they are an *immediate* family member. Uncles, cousins, grandparents, and those more distant family relations should be entered as a separate family. In ACS People, you can still make a note of the family relationship under **Other Relationships** in **View/Edit Individual**.

1. In the assisted check-in start window, under **Check In**, locate the family record as you do normally (by name, phone number, pager, or bar code).
2. In the listing of family members, click **Add Family Member**.
3. Enter as much information as possible about the new family member, then click **OK**.
4. Select the sessions the new family member is attending.
5. For each session, enter the person's class, status, position, and other general fields information.
6. To enter any special notes about the new family member, such as food allergies, click **Add Note**.
7. Repeat these steps for each additional family member. When the new family member is added, complete the check-in process for the family as you do normally.

1. In the self check-in start window, locate the family record as you do normally (by name, phone number, pager number, or bar code).
2. In the listing of family members, click **Add to family**.
3. Enter as much information as possible about the new family member.
4. Select the sessions the new family member is attending.
5. For each new session, enter the person's class, status, position, and other attendance information.
6. Repeat steps 2-5 for each additional family member. When the new family member is added, complete the check-in process for the family as you do normally.

Add New Family Members

If visitors are accompanied by a member, the member can add their information at self check-in. In order to do this, **Display Options for Adding New People** must be selected in Checkpoint Setup. This option is located in **Check/In Out Defaults** under the **Express Check In/Out Options**. If visitors are unaccompanied, they need to check in at an assisted check-in station. Staff and volunteers manning assisted check-in stations need to be familiar with this process of adding new people during check-in.

> ⚠ **Add Visitors as New Families**
>
> Unless they are the *immediate* family member of a family already entered in your ACS data set, all new people should be added as new families. ACS records are organized by family, even if there is just one person in the family.

1. In the assisted check-in start window, under **New Family/Visitor**, click **Add New Family**.
2. Enter as much information as possible about the head member of the family.
3. To add additional family members, click **Save/Add Family Member**.
4. When you are finished adding all family members, click **Save**.
5. To enroll the family in all available sessions, click **Check In All**. Or, select the sessions each family member is attending.
6. For each session, enter the person's class, status, position, and other general fields information.
7. To enter the pager number of the family, click **Add Pager #** .
8. To enter special notes about individual family members, such as food allergies, click **Add Note,** then click **Next**.
9. Click **Print All** to print all security badges. Or, you can individually select the badges for printing.
10. Click **Finish**. The new family is added and checked in.

1. In the self check-in start window, click either **Name**, **Phone**, or **Pager** (whichever is available).
2. Click **Add Person**.
3. Enter as much personal information as possible about the head member of the family.
4. To add additional family members, click **Add To Family**.
5. Select the sessions each family member is attending.
6. For each session, enter the person's class, status, position, and other attendance information.
7. To enter the pager number of the family, click **Add Pager #**

The family is added. Complete the check-in process as you do normally.

Printing Badges

You can print badges during self or assisted check-in. Options for printing badges display in the last window of check-in. Next to an individual's name, select the badges you want to print for that person. Or, click **Print All** to print security badges for all individuals. To print additional badges, simply select the badge as many times as you want it to print.

Print Multiple Badges

When checking in, each child gets a security badge, and you can print extras. For example, if you have a baby, you can print one security badge for the child and one for the diaper bag. For parents, one parent badge prints with all the children listed on the badge. Like the child badge, you can print extras. That way both mom and dad can have a matching parent badge.

When budgeting for printing supplies, think about whether you want to print multiple badges, use combined sessions badges, and/or create shared parent badges.

Compatible Printers and Badges

Compatible Printers	Badges
Dymo LabelWriter 450 Turbo	DymoTRDMRK2.gif 2 1/4" X 4" Adhesive Name Badges #30857 2 1/4" X 4" Color Badges for LabelWriter Turbo
Zebra GK420d™	2 1/4" X 4"Badges for Zebra Printer

⚠ Badges in Checkpoint do not print in color, only grayscale.

Session Statistics

As people check in with Checkpoint, use session statistics to watch the progress of sessions filling up, to limit the number of people in a group, to locate who is attending what sessions, and to sort and print session statistics. To open session statistics, click **View Statistics** in the assisted check-in start window.

⚠ **Session Statistics is not accessible while self check-in is open on the same computer.**

You must close self check-in before locating people in sessions or attempting to sort or print session statistics.

Close Groups

If you need to reduce the maximum number of people allowed in a class or a group for a specific day, you can close the group. You don't have to change the standard maximum number of people allowed in the group (and remember to change it back later). Closing a group can be helpful for keeping student-teacher ratios balanced when one teacher is unable to attend a scheduled class that normally has several teachers. You may also need to close a group early if a group is reassigned to a smaller room.

To reduce confusion, if a class is unavailable, it doesn't display at self check-in stations.

When Closing Groups

- Closed groups remain closed until attendance markings are either cleared or posted, or until you manually re-open the group.
- You cannot close a group while self check-in is open on the same computer. You must exit self check-in before closing a group.

1. Close the self check-in window.
2. Under **Run Inquiry**, in the drop-down list, select **Checkpoint Session Inquiry** and click **Go**.
3. Click on the **Statistics** tab.
4. In the **Session** drop-down list, select the session associated with the group that you want to close.
5. Under **Date**, verify the date. Groups cannot be closed before or after they occur.
6. Click **Close Groups**.
7. In the left list, select the group you want to close.
8. Click **Add** . This moves the group to the list of closed groups.
9. Repeat these steps for each group you want to close, then click **OK**.

1. In the assisted check-in start window, click **View Statistics**.
2. Click the **Statistics** tab.
3. In the **Session** drop-down list, select the session associated with the group that you want to close.
4. Under **Date**, verify the date. Groups cannot be closed before or after they occur.
5. Click **Close Groups**.
6. In the left list, select the group you want to close.
7. Click **Add** . This moves the group to the list of closed groups.
8. Repeat steps 7-8 for each group you want to close, then click **OK**.

Locating People in Sessions

Despite all preparations to the contrary, check-in can be hectic. Sometimes families show up separately to attend Sunday school classes, only to realize that they don't know which sessions they're attending. In scenarios like this, use Checkpoint to locate what sessions individuals are attending.

1. Close the self check-in window.
2. Under **Run Inquiry**, in the drop-down list, select **Checkpoint Session Inquiry** and click **Go**.
3. Click the **Locate** tab.
4. In the **Session** drop-down list, select **All Sessions**.
5. Under **Locate By**, enter the last name of the individual and click **Find**.
6. The individual's information displays below, including the session and group he or she is attending.
7. Double-click the person's name to view the times the individual checked in and out.

1. In the assisted check-in start window, click **View Statistics**.
2. Click the **Locate** tab.
3. In the **Session** drop-down list, select **All Sessions**.

4. Under **Locate By**, enter the last name of the individual and click **Find**.
5. The individual's information displays below, including the session and group he or she is attending.
6. Double-click the person's name to view the times the individual checked in and out.

Sorting and Printing Session Statistics

Sort and print session statistics to analyze the attendance of sessions at your organization. Sorting and printing session statistics is a quick and basic form of creating Checkpoint reports. To sort and print session statistics, first navigate to the session statistics window.

1. Close the self check-in window.
2. Under **Run Inquiry**, in the drop-down list, select **Checkpoint Session Inquiry** and click **Go**.
3. Click the **Statistics** tab.
4. In the **Session** drop-down list, select the session that you want to view.
5. Under **Date**, verify the date.
6. The groups within the session display below. The number of people checked in and out display. OPTIONAL: Double-click a specific group to view the individuals checked in to it.

1. In the assisted check-in start window, click **View Statistics**.
2. Click the **Statistics** tab.
3. In the **Session** drop-down list, select the session that you want to view.
4. Under **Date**, verify the date.
5. The groups within the session display below. The number of people checked in and out display. OPTIONAL: Double-click a specific group to view the individuals checked in to it.

1. Click **Roster Group** to sort alphabetically by the names of groups. Click **Roster Group** again to reverse the sort.
2. Click **IN** to sort by the number of people checked in. Click **IN** again to reverse the sort.
3. Click **OUT** to sort by the number of people checked out. Click **OUT** again to reverse the sort.
1. Right-click and select either **Print Grid**, **Print Detail**, or **Print All - Grid**. See Additional Information for more on each printing option.
2. The print preview displays. Manage the printing options to your liking.
3. Click **File** > **Print**.

Viewing Session Statistics

Sort and print session statistics to analyze the attendance of sessions at your organization. Sorting and printing session statistics is a quick and basic form of creating Checkpoint reports. To sort and print session statistics, first navigate to the session statistics window.

1. Close the self check-in window.
2. Under **Run Inquiry**, in the drop-down list, select **Checkpoint Session Inquiry** and click **Go**.
3. Click the **Statistics** tab.
4. In the **Session** drop-down list, select the session that you want to view.
5. Under **Date**, verify the date.

6. The groups within the session display below. The number of people checked in and out display. OPTIONAL: Double-click a specific group to view the individuals checked in to it.

1. In the assisted check-in start window, click **View Statistics**.
2. Click the **Statistics** tab.
3. In the **Session** drop-down list, select the session that you want to view.
4. Under **Date**, verify the date.
5. The groups within the session display below. The number of people checked in and out display. OPTIONAL: Double-click a specific group to view the individuals checked in to it.

1. Click **Roster Group** to sort alphabetically by the names of groups. Click **Roster Group** again to reverse the sort.
2. Click **IN** to sort by the number of people checked in. Click **IN** again to reverse the sort.
3. Click **OUT** to sort by the number of people checked out. Click **OUT** again to reverse the sort.

1. Right-click and select either **Print Grid**, **Print Detail**, or **Print All - Grid**. See Additional Information for more on each printing option.
2. The print preview displays. Manage the printing options to your liking.
3. Click **File** > **Print**.

Additional Field Information
Print Grid Selecting this prints the current information you see on the session statistics grid. This is also called a Session Statistics Summary Report. **Print Detail** Prints more detailed information about a specific class within a selected session, including the individuals attending the session and when they checked in and out. When selecting print detail, make sure to right-click the specific group. **Print All - Detail** Prints a detailed report for every class in a selected session, including the individuals attending the sessions and when they checked in and out.

Checkpoint Reports

Once you finish checking people in and out of classes and events, you can run reports on your Checkpoint data, session statistics, and a complete list of people's Checkpoint information. You can also post attendance markings to your ACS attendance records if you own the Attendance module. Checkpoint has security badge, bar code label, pager assignment, and sessions statistics reports that you can print, preview, and export.

The following report types are available in Checkpoint and contain information about your sessions and the people who attended them. Some of these reports also coordinate with other modules in the People Suite.

- **Labels** — Label reports include bar code labels and security badges. Print bar code labels to attach to them ID cards or key fobs and use them for locating individual's records as check-in time. Print security badges as a report to print them in bulk ahead of time for an event.
- **List** — Print a customized list of people's Checkpoint information, including bar codes, pager numbers, and special notes.
- **Statistics** — Print session statistics to analyze people's attendance of classes and activities. You can view people's attendance for all sessions or for specific sessions.

There are many options available in printing reports. We recommend that you experiment with each report and examine the options available for each one.

Customize Checkpoint List Reports

In ACS, you can print a customized list of people's relevant Checkpoint information, including bar codes, pager numbers, and special notes.

1. Under **Searches and Reports**, click the **Reports** tab.
2. In the drop-down list, select **Checkpoint Reports** and lick **Go**.
3. In the left pane, expand **Lists**, then select the **Listing of Names, Barcodes, Pager #'s, and Notes**.
4. In the lower left pane, click **Customize**.
   OPTIONAL: Under **Report Title**, name the report and select the print date.
5. Under **Report Settings** and **Report Options**, select the options you want to include in the report. See Additional Information for more on each option. Not all options are available for all reports.
6. Click **Preview** to generate the report.
7. **Save** or **Print** the report.

Customize Session Statistics Reports

Use session statistics reports to analyze people's attendance of classes and activities. You can view people's attendance for all sessions or for specific sessions. You can run reports for any range of dates, which allows you to analyze attendance records in the short term or long term. Visitors are indicated with an asterisk (*).

> ⚠ **Only Available Before Posting Attendance**
>
> You can only generate session statistics reports *before* you have posted attendance for a session. After posting attendance, the session statistics are no longer stored for reporting.

1. Under **Searches and Reports**, click the **Reports** tab.
2. In the drop-down list, select **Checkpoint Reports** and click **Go**.
3. In the left pane, expand **Statistics** > **Session Statistics**.
4. In the lower left pane, click **Customize**.
   OPTIONAL: Under **Report Title**, name the report, then select the print date.
5. On the **Report Options** tab, under **Session**, in the drop-down list, select the session you want to report on.
6. Under **Report Settings** and **Report Options**, select the options you want to include in the report. See Additional Information for more on each option. Not all options are available for all reports.
7. Under **Date Range**, select the dates to include in the report.
8. Click **Preview** to generate the report.
9. **Save** or **Print** the report.

Additional Field Information

Print only records with Pager #s
Selecting this prints only individual's records that have assigned pager numbers.

Print only records with Notes
Prints only individual's records that have special notes. So, for example, if your organization is hosting vacation bible school, a session statistics report can help you organize a list of allergies for each child in each classroom, and the emergency contact information for their guardians.

Sort by Pager #
Sorts the individuals in the report by their assigned pager number.

Include Parent's Name
Prints the parent names for children in the report. This is especially useful for sessions designated for children, such as youth groups and vacation bible school.

Page Break on Group
Select this to have each group display on a separate page. For example, you are printing Sunday School session statistics and you want to give each Sunday School instructor a report on their classes.

Print Security ID
Select this option to print the security ID for each individual on the report.

Print Time In/Time Out
Prints the latest check-in and check-out time of each person.

Checkpoint Attendance

When you finish checking people in and out of classes, activities, and events, you can post attendance markings from your Checkpoint sessions to your ACS attendance records or you can clear attendance markings

Post Attendance Markings

When you post attendance from your Checkpoint sessions, you have the option to automatically add new people to class rosters. For example, John Gibson is a tenth grader attending the class for the first time. At an assisted check-in station, you add him to your people database and check him into the tenth grade class. When you post attendance, you have the option of adding John to the tenth grade class roster. Next week when John checks in, he'll already be assigned to the tenth grade class.

Notes

- If you plan to run the Session Statistics report in Checkpoint, you must do this before posting your attendance markings.
- You can only post attendance for individual sessions, not for templates.
- For activity groups, be sure to select **Post to Element 1** and **Post to Element 2** in the bottom-left corner of the Post Markings window.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint Sessions** and click **Go**.
3. Select the session, then click **Post Markings**.
4. Select the date you want to post the attendance markings for, then select additional individuals whose attendance you want to post.
5. Click **Post**.

Clear Attendance Markings

If you don't want to post attendance markings from a session, clear the markings instead. Clearing attendance markings prevents them from being recorded in you ACS attendance records. You can only clear markings that have not been posted and you can only clear attendance for individual sessions, not for templates.

1. Under **Advanced Tools**, click the **Settings** tab.
2. In the drop-down list, select **Checkpoint Sessions** and click **Go** .
3. Select the session, then click **Clear Markings**.
4. Select the date you want to clear the attendance markings of.
5. When the confirmation message displays, click **Yes**.

Checkpoint for Multiple Campuses

Checkpoint's import and export functions let you share data from your primary location, or **parent** network, to a satellite location, or **off-site** network.

This is especially useful for multi-campus ministries, but you can also use it if you hold classes or activities in an area with no Internet access. For example, your high school students may meet in a building that is not connected to your ministry's parent network, (the building may not have Internet access or it's too far away to connect to the parent network). You can still check-in students and print security badges by importing and exporting Checkpoint data.

Before using Checkpoint at an off-site network, you must download ACS on your off-site network (or computer) and import your ACS dataset from the parent network. At the off-site network, you must receive data from the parent network before each check-in. After check-in, you must send the off-site network data back to the parent network.

Importing and Exporting Data

When importing and exporting data, only Checkpoint information is shared.

Setting Up Checkpoint Parent and Off-site Networks

Off-site networks adopt the Checkpoint settings of the parent network, including sessions, templates, and badges. Off-site networks cannot manage most Checkpoint settings on their own and have limited ACS People Suite capabilities. You can sync Checkpoint data between the parent and off-site networks easily and often.

Before using Checkpoint at an off-site network, you must install ACS and import your ACS dataset from the parent network. After following these setup instructions, you are ready to send and receive Checkpoint data between your parent and off-site stations. You must repeat these instructions each time you update your version of ACS.

Here are a few important notes before starting the process.

Set up Separate User Names

To import the current ACS data to an off-site network, you must log in using one of the default ACS user names. Any user names other than the defaults will not be available until you import the Checkpoint data. After you log in and import the data, the People Suite window will close. When you log back in, you must log in as someone other than the person who created the export and any other individuals logged in to ACS at the time the export is created

It may be helpful to set up user names such as "cpmain1," "cpmain2," and "offsite1," "offsite2," in your parent ACS database. These new user names only apply before you have exported data, so you should create them *before* you start the set up process.

Security Rights

When you log back into an ACS off-site network after copying the export from the parent site, only options that the user has security rights to in Checkpoint *on the parent network* are available.

Set up the Parent Network

Because you're working with entire datasets, we recommend backing up your ACS dataset before proceeding.

You must have the exact same version of ACS on the off-site network and parent network. The easiest way to ensure this is to copy the parent ACS installation file. After copying the parent ACS installation file, but before heading to the off-site network, you should export your current ACS dataset to the same flash drive.

1. On the parent network, insert a flash drive, that you plan to store the ACS installation file.
2. Open and log in to ACS People Suite.
3. Under **Advanced Tools**, click the **Settings** tab.
4. In the drop-down list, select **Checkpoint**.
5. Click **Go**.
6. In the left pane, click **Import/Export Data**.
7. Click **Save ACS Install**.
8. Save this file to the flash drive.
9. If you are installing ACS for the first time on the off-site network, copy the **Registration Code** to use later.

1. Under **Import/Export Data**, click **Export Data**.
2. Save the dataset file to your flash drive.
3. Close ACS People.
4. Eject and remove the media from the computer.

Set up an Off-site Network

Now you can take the flash drive to the off-site network and set up the off-site network. Once you have set up the parent network, you can use the exported files to set up the off-site network. Start by installing ACS on the off-site network, then you can import the current ACS data to the off-site network.

1. Insert the flash drive in the off-site network.
2. On the computer, click **Start** > **My Computer**.
3. Navigate to the flash drive and the ACS installation file that you saved.
4. Run the installation file.

1. Insert the flash drive in the off-site network.
2. Open and log in to ACS People Suite as a different user than on the parent network.
3. Under **Advanced Tools**, click the **Settings** tab.
4. In the drop-down list, select **Checkpoint** and click **Go**.
5. In the left pane, click **Import/Export Data**.
6. Under **Using Checkpoint with an Off-site Network**, select **This is an off-site network**.
7. In the **Off-site Network Import** window, click **Browse**.
8. Navigate to the flash drive and the ACS dataset file that you saved.
9. Select and **Open** the file, then click **Next**.

Once the dataset is imported, ACS will close. You are now ready to start checking people in on your offsite network! After check-in time is over and attendance taken, see Setting Up Checkpoint Parent and Off-site Networks for instructions on getting your off-site Checkpoint data back to your parent site.

Importing and Exporting Checkpoint Data

After setting up your parent and off-site networks to share Checkpoint data, you're ready to start exchanging that data.

On your off-site network, you **export** the data that you collected during check-in. On your parent network, you **import** the check-in data from the off-site network.

> **Additional Information**
>
> You can export data to the parent network for multiple sessions without clearing any data from the off-site network. Although it is possible to export data one event at a time, we recommend waiting until all events for the day are completed, so that you can export all data at one time. By doing this, the parent network will only need to import the data once, rather than multiple times.

1. On the off-site network, insert the flash drive that you plan to store the Checkpoint data export.
2. Open and log in to ACS People Suite.
3. Under **Advanced Tools**, click the **Settings** tab.
4. In the drop-down list, select **Checkpoint** and click **Go**.
5. In the left pane, click **Import/Export Data**.

6. Click **Export Data** to create a Checkpoint data file.
7. Save this file to the flash drive. Now you ready to import the data on the parent network.

1. On the parent network, load the flash drive on which you saved the Checkpoint data.
2. Open and log in to ACS People Suite.
3. Under **Advanced Tools**, click the **Settings** tab.
4. In the drop-down list, select **Checkpoint** and click **Go**.
5. In the left pane, click **Import/Export Data**.
6. Click **Import Data**.
7. Navigate to the flash drive and select the Checkpoint data file.
8. Click **Open**. The data from the off-site network is imported to the parent network.

Off-site Checkpoint for OnDemand

If OnDemand customers need to check people into a location where there is no Internet access, they can use off-site Checkpoint. Since the off-site location is not connected to the Internet, you'll save the data locally, and then update your ACS dataset in the parent network at a later time. Checkpoint's import and export functions let you share and sync data from OnDemand to an off-site network, easily and often.

Important Information

- Before you do anything, call Support at 1-800-669-2509 to request an installation packet to use at the offsite location.
- Off-site networks adopt the Checkpoint settings of the parent network, including sessions, templates, and badges.
- Off-site networks cannot manage most Checkpoint settings on their own and have limited ACS People Suite capabilities.
- Each time ACS is updated in OnDemand, you must save a new installation file and install it on the off-site network.
- Before using Checkpoint at an off-site network, you must install ACS and import your ACS dataset from the parent network. You must repeat these instructions each time you update your version of ACS.

1) Set up separate user names

1. Log in using a default ACS user name. (Only default user names are available until you import the Checkpoint data.)
2. Import the data, the People Suite window will close. When you log back in, you must log in as someone other than the person who created the export any other individuals logged in to ACS at the time the export is created

It may be helpful to set up user names such as "cpmain1," "cpmain2," and "offsite1," "offsite2," in your parent ACS database. These new user names only apply before you have exported data, so you should create them before you start the set up process.

Security Rights

When you log back into an ACS off-site network after copying the dataset from the parent site, the user only has security rights in Checkpoint *on the parent network*.

2) Set up the parent network

You must have the same version of ACS on both the off-site and parent networks. In OnDemand, there is a
separate set of instructions because the installation file does not exist in the ACSNET folder in the OnDemand environment. In OnDemand, copy the installation path and then, from the local computer, download the installation file from our FTP site online. You'll need to save this file to a flash drive to take to the offsite location. After saving the ACS installation file, you should export your current ACS dataset to the same flash drive.

1. On the parent network, insert a flash drive so that you can store the ACS installation file.
2. Open and log into OnDemand, then log into ACS People Suite.
3. Under **Advanced Tools**, click the **Settings** tab.
4. In the drop-down list, select **Checkpoint**.
5. Click **Go** .
6. In the left pane, click **Import/Export Data**.
7. Click **Save ACS Install**. Follow the steps listed on the **Save ACS Install** window, and save this file to your flash drive.
8. If you are installing ACS for the first time on the off-site network, copy the **Registration Code** to use later.

1. Under **Import/Export Data**, click **Export Data**.
2. Save the dataset file to the **S** drive.
3. Close ACS People.
4. In the OnDemand window, open **My Computer**. The IDS File Manager displays.
5. In the **Address** drop-down list, select the **S** drive.
6. Right-click on the Checkpoint import file, then click **Copy**.
7. In the **Address** drop-down list, navigate to the location where you want to save the file on your hard drive.
8. Right-click and select **Paste** to transfer the file.
9. Close the IDS File Manager. On your computer, save the Checkpoint import file from your hard drive to your flash drive.
10. Eject and remove the flash drive from the computer.

3) Set up an off-site network

Now you can take the flash drive and set up the off-site network with the exported files. Install ACS on the off-site network, then import the current ACS data to the off-site network.

1. Insert the flash drive in the off-site network computer.
2. On the computer, click **Start** > **My Computer**.
3. Go to the flash drive where your ACS installation file is saved.
4. Run the installation file.

1. Insert the flash drive in the off-site network.
2. Open and log in to ACS People Suite as one of the default users.
3. Under **Advanced Tools**, click the **Settings** tab.
4. In the drop-down list, select **Checkpoint** and click **Go** .
5. In the left pane, click **Import/Export Data**.
6. Under **Using Checkpoint with an Off-site Network**, select **This is an off-site network**.
7. Click **Import Off-Site Data**.
8. In the **Off-Site Network Import** window, click **Next**, then **Browse**

9. Go to the flash drive where your ACS installation file is saved.
10. Select and **Open** the file, then click **Next**.

Once the dataset is imported, ACS will close. You're now ready to check people in with your off-site network! After check-in is over and attendance is taken,follow the instructions below to learn how to return your off-site Checkpoint data back to your parent site.

4) Import / export Checkpoint data

On your off-site network, you **export** the data you collected during check-in. On your parent network, you **import** the check-in data from the off-site network.

> **Additional Information**
>
> You can export data to the parent network for multiple sessions without clearing any data from the off-site network. Although it is possible to export data one event at a time, we recommend waiting until all events for the day are completed, so you can export all data at one time. By doing this, the parent network will only need to import the data once, rather than multiple times.

1. On the off-site network, insert a flash drive to store the Checkpoint data export.
2. Open and log in to ACS People Suite.
3. Under **Advanced Tools**, click the **Settings** tab.
4. In the drop-down list, select **Checkpoint** and click **Go** .
5. In the left pane, click **Import/Export Data**.
6. Click **Export Data** to create a Checkpoint data file.

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7. Save this file to the flash drive. Now you're ready to import the data to the parent network.

1. On the parent network, load the flash drive on which you saved the Checkpoint data.
2. Copy the file from the removable media to your hard drive.
3. Open and log in to OnDemand.
4. In the OnDemand window, open **My Computer**. The IDS File Manager displays.
5. In the **Address** drop-down list, browse your hard drive for the Checkpoint data file.
6. Right-click on the file name, then click **Copy**.
7. In the **Address** drop-down list, select the **S** drive. This drive is mapped to your site on the IDS Server.
8. In the S drive, right-click and select **Paste** to transfer the file.
9. Open and log in to ACS People Suite.
10. Under **Advanced Tools**, click the **Settings** tab.
11. In the drop-down list, select **Checkpoint** and click **Go** .
12. In the left pane, click **Import/Export Data**.
13. Click **Import Data**.
14. A message displays asking if you want to continue. Click **Yes**.
15. Go to the **S** drive and select the Checkpoint data file.
16. Click **Open**. The data from the off-site network is imported to the parent network.

Checkpoint on an iPad

For small check-in situations, you can use ACS Checkpoint on an iPad® . To check in people with an iPad, you'll need to do the following:

1. Configure your server
2. Configure your iPad

> **Checkpoint using ACS Desktop**
>
> This documentation is for using Checkpoint on an iPad for the desktop version of ACS. We do not support printing from the OnDemand app for the iPad.

Configuring Your Server

Your iPad will connect to the server to use Checkpoint. Your first step is to configure the Checkpoint server.

The exact steps to configure the server depend on how the server is set up. If you have questions about this, please consult your system administrator.

Here are some general suggestions for configuring the Checkpoint server:

- We recommend adding a new user profile to your remote access (or similar) computer management group. Grant the profile full access to the folders ACSNET and WINACS.
- When using the Checkpoint software on the server, turn on Terminal Server services and turn off Licenses. By doing this, you'll have two logins; if more than two people log in at the same time, you'll need to purchase additional licenses.
- Ensure Checkpoint is fully installed and set up before attempting to connect the iPad to it.
- To print badges from an iPad, the server must have access to the printers, whether by sharing over the network or by direct connection.

Configuring Your iPad

To use Checkpoint on an iPad, you need a remote connection to the Checkpoint server. This requires a remote desktop connection application on the iPad. You can use any remote connection application, but we recommend RDP Lite because it's free and reliable.

> **Useful Information**
>
> In order to configure your remote desktop connection application, you'll need the following information about the Checkpoint server:
>
> - IP address
> - Login user name
> - Login password
>
> Please consult your system administrator for this information.

Once RDP Lite installs, configure it to connect to the server.

1. On the iPad, open the **App Store**.
2. Search for **RDP Lite**.
3. Select the app **Remote Desktop Lite - RDP** produced by MochaSoft.

4. Click **Free** > **Install**.
5. Enter your password.

1. Open RDP Lite.
2. Click **New**.
3. Under **PC Address**, enter the server's name or IP address.
4. Under **PC User**, enter the user name for logging in to the server.
5. Under **PC Password**, enter the password for logging in to the server.
6. Under **Name**, enter a name that helps you identify the connection's purpose. For example, "Checkpoint Connection."
7. Under **More** > **Screen Size**, set the display to **1024 X 768** or higher. (Higher resolutions improve visual quality, but can slow down the application.)
8. The other settings are optional. Manage them to your liking. (In RDP Lite, click **Help** for more information on each option.)
9. Click **Connect** > the connection name.
   When the iPad is connected to the server, the server login displays. You may be required to log in again. Once logged in, open ACS and use Checkpoint as you do normally. Repeat these steps to install and configure RDP Lite for each additional iPad.

Tips

- When using iPads at unmanned check-in stations, we recommend that you purchase physical security locks for the iPads. Lock the iPad to the station during check-in and use the accompanying key to easily remove it afterwards.
- iPad locks are available from several retailers.

After you establish a remote connection with the Checkpoint server, from the iPad, open ACS and use Checkpoint as you normally do. Depending on how the Checkpoint installation is configured on the server, you can operate both assisted check-in and self check-in on the iPad.