

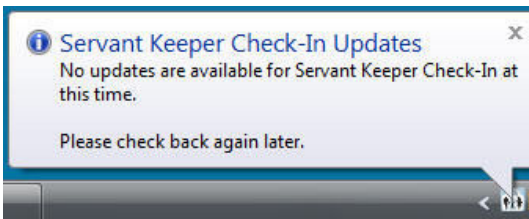
Servant Keeper Check-In Quick Start Guide

Automatic Update Setup

After the Servant Keeper Check-In installation is complete you will need to setup the Servant Keeper Automatic Update schedule to check and download updates. This will ensure that you are running the latest version of Servant Keeper Check-In when it becomes available.

Click **Start | Programs | Servant Keeper Check-In | Servant Keeper Check-In Update Setup** to launch the update setup program.

You can also check for an update now by clicking **Start | Programs | Servant Keeper Check-In | Check for Servant Keeper**



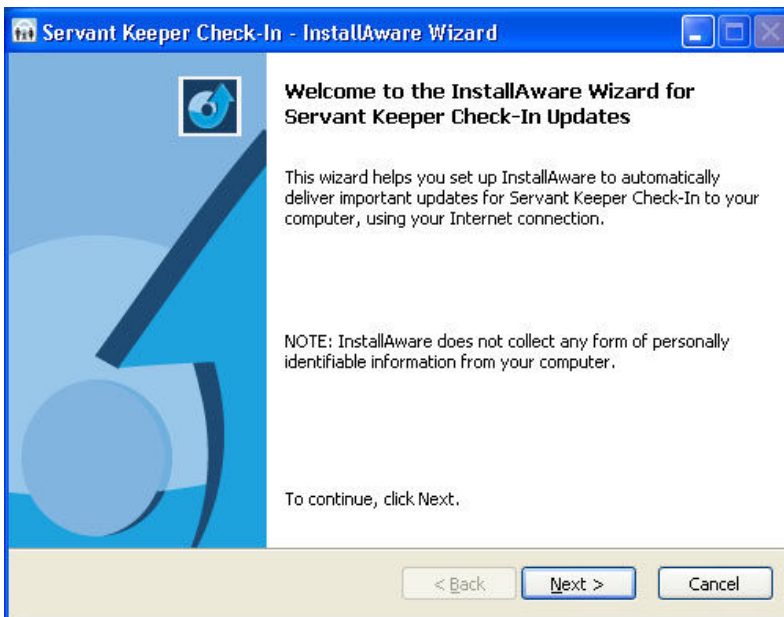
Click on the balloon to download the update. The update scheduler will appear and you will have the option to setup Servant Keeper Check-In to automatically check for updates on a specified date and time.

If you setup Servant Keeper Check-In to check for updates automatically we recommend that you schedule the updates during an off time (ie. late at night) so the update process will not interfere with the operation of Servant Keeper Check-In.

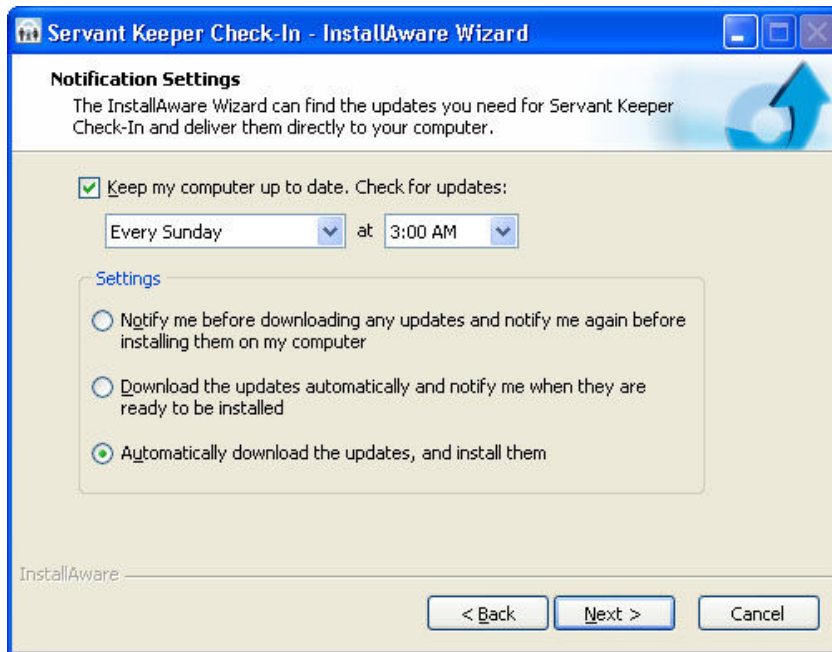
In order for the Automatic Updates to take place they must be set up on the server or main computer where Servant Keeper Check-In is installed and the computer must be turned on and connected to the internet

If you choose to setup automatic updates you will see the following screens.

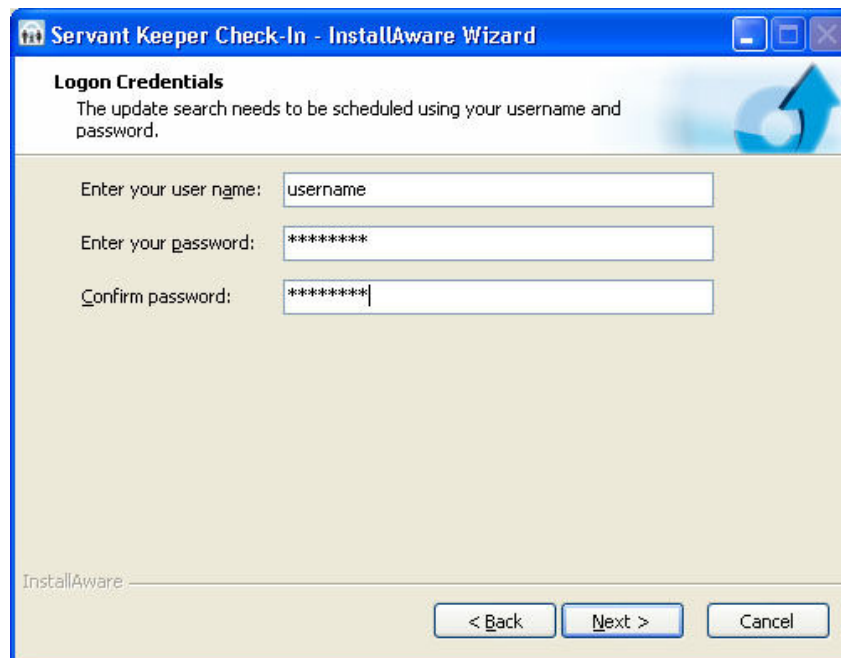
1.



2.



3.



To change the schedule for automatic updates once you have set them up, go to windows scheduled tasks. Click **All Programs**, point to **Accessories**, point to **System Tools**, and then click **Scheduled Tasks**.

There are a few things that you will need to do before using Servant Keeper Check-In for the first time.

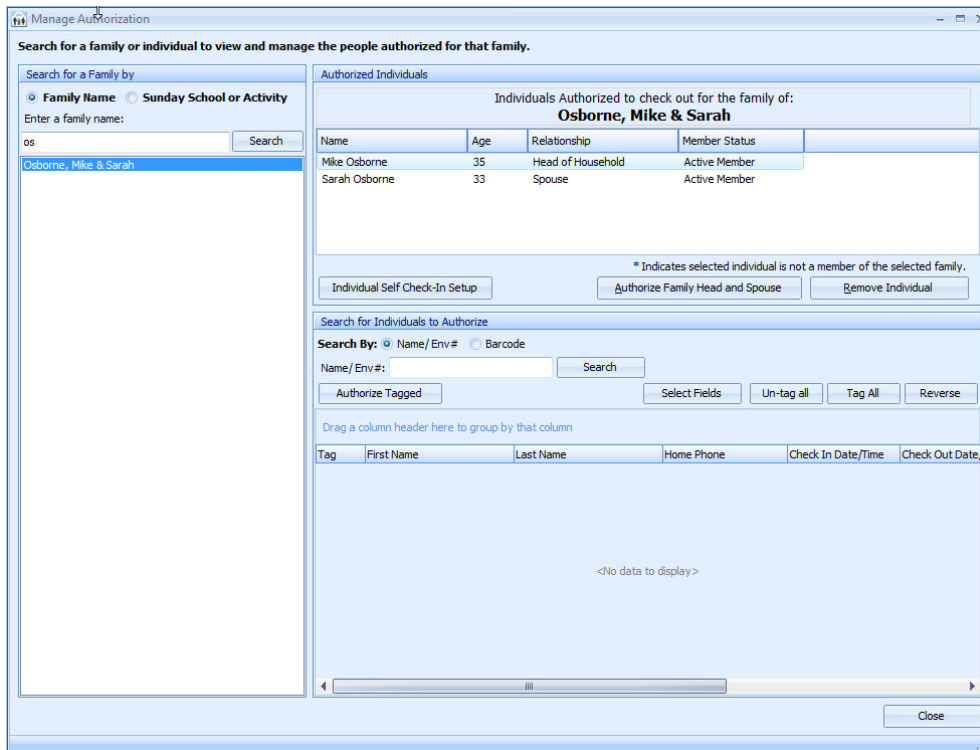
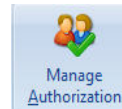
If you did not authorize the Head of Household and Spouse during the Servant Keeper Check-In Setup Wizard, you will need to do it now. Anyone that should be authorized to check children in or out will need to be added to your Servant Keeper program before you can authorize them in Servant Keeper Check-In.

*Note: If you plan on using Servant Keeper Check-In to allow adults to check into events as well; they will need to be authorized to check themselves in and out of events (even if they do not have children). Only authorized individuals can complete the check-in/checkout process.

Here are the steps to authorize individuals for child check-in and check-out:

- a. Open your Servant Keeper Check-In program
- b. Click on the Manage Authorization button

You will see the Manage Authorization screen:



Search for a family or individual to view and manage the people authorized for that family.

Search for a Family by
 Family Name Sunday School or Activity
Enter a family name:
os Search

Authorized Individuals
Individuals Authorized to check out for the family of:
Osborne, Mike & Sarah

Name	Age	Relationship	Member Status
Mike Osborne	35	Head of Household	Active Member
Sarah Osborne	33	Spouse	Active Member

* Indicates selected individual is not a member of the selected family.

Individual Self Check-In Setup Authorize Family Head and Spouse Remove Individual

Search for Individuals to Authorize
Search By: Name/ Env # Barcode
Name/ Env #: Search

Authorize Tagged Select Fields Un-tag all Tag All Reverse

Drag a column header here to group by that column

Tag	First Name	Last Name	Home Phone	Check In Date/Time	Check Out Date
<No data to display>					

Close

You may search for individuals to authorize by Family Name or by Sunday School or Activity. To search by Family Name:

1. Click on the Family Name radio button
2. Enter the name of the family member for the person you want to authorize.
3. This will bring up the matching families below. You can authorize both the Head of Household and Spouse at the same time by clicking the **[Authorize Family Head and Spouse]** button (found in the middle of the screen).

4. To authorize any other family members or other individuals, go to the "Search for Individuals to Authorize" window.
5. You may search by Name/Env# or by scanning their barcode member card or a report printed with barcodes from Servant Keeper.
6. Once you find the individual; tag them by clicking in the box to the left of their name.
7. To authorize them, click the **[Authorized Tagged]** button.
8. You will see a window asking if you are sure you want to authorize the tagged individual. Click the **[Yes, authorize the tagged individual]** and you will see their name under the Individuals Authorized to check out for the family of: window. If you do not want to authorize the tagged individuals, click the **[No, do not authorize the tagged individuals]** button and they will not be authorized to check in or check out children from the selected family.
9. Close the Manage Authorization window when you have completed authorizing individuals.

Next you will need to setup your System Options. To begin setting these up, open your Servant Keeper Check-In program.



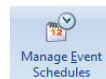
1. Click on the Application button in the top left side of your window.
2. Click on System Options at the bottom of the list.
3. The first thing to setup is the Kiosk Password. This is a password that will unlock your Kiosk from Self Check-In. It has to be all numbers and can be up to 10 digits in length. (*Note: This password will only apply to this kiosk. You will need to setup a password at each kiosk. The password can be the same or computer specific, whichever you prefer.)
4. Click on the **[Servant Keeper Check-In Database]** button. This setting gets setup during the installation of MS SQL Server and the Servant Keeper Check-In database and program. If it ever needs to be changed, this is where you will need to make that change.
5. Click on the **[Servant Keeper Setup]** button. This is where your Servant Keeper program is installed.

NOTE: This is where you need to go to make changes in Servant Keeper Check-In if the path to your Servant Keeper program ever changes.
6. Click on the **[Scanner, Printer, and Claim Ticket]** button. This is where you setup the optional hardware you may use with Servant Keeper Check-In. This is also where you indicate which type of Claim Badge you want to use.
7. Click on the **[Self Check-In Setup]** button. This is where you can set up Servant Keeper Check-In to allow individuals to Check-In using a pass code or an envelope number when in Self Check-In mode.
8. Click on the **[Room Management]** button. This is where you will enter in the rooms you will be using with your Servant Keeper Check-In program. You may also enter rooms on the fly when entering in Events (explained in Item 12 below).

9. Click on the **[Name Badge Options]** button. This is where you will enter all of the Allergies, Needs (this label can be customized) and Drop off Items that will print on your Name Badges. There is a limit of 60 items per list.
10. Click on the **[Miscellaneous Options]** button. This is where you will enter your Church or Ministry name and attach your logo to print on name badges and claim tickets if desired. You may also include an Unauthorized User Kiosk Message to people who are trying to use the Kiosk and do not have permission to do so. Once you have completed this step, close the System Options window.




11. Click on the **[Manage Staff Security]** button.
12. The entire list of Servant Keeper user's that you checked to be imported during the Servant Keeper Check-In setup will appear. Highlight each user one-by-one, then click **[Edit]** and assign the user the correct permissions you wish them to have when using the Servant Keeper Check-In program. There are over 40 security settings to choose from.
13. You are now ready to setup and manage your Events and Event Schedules.



Click on the **[Manage Event Schedules]** button.

This is where you will setup events to be used in Servant Keeper Check-In. On the left side of the screen (under "Events from Servant Keeper") click on the drop down arrow at the end of the blank field. You will have the choices of: Worship Services, Sunday Schools and Activities. (If you have renamed the Sunday School and/or Activities field in Servant Keeper those customized names will appear instead). For example, if you renamed the Sunday school field in Servant Keeper to Children's Events, then in the drop down list you would see Worship Services, Children's Events and Activities. Choose the type of event and you will see a list of services/classes/activities associated with the event. For example if you choose Worship Service, there will be a list of all of your Worship Services. Click on the specific event you wish to setup, and then click the **[Add]** button on the right to add that event and create a schedule for that event. The Event Setup window will allow you to choose the days that the event will occur, the start and end time of the event, the room that the event will be held in (you can enter rooms on the fly here) and choose to print a claim ticket and name badge for the event. If you are doing a worship service you will probably not want to print a claim ticket but you may want to print a name badge. Click the **[Save]** button once you have completed this step.



14. Click the **[Manage Individuals]** button. This is where you go to assign or unassign pass codes, link or unlink key fobs, and/or link or unlink driver's licenses. For more information on linking a key fob or a driver's license click the  button in the Servant Keeper Check-In. You can globally assign a pass code to all individuals authorized to check-in to Servant Keeper Check-In by clicking the **[Tag All]** button and then click the assign **[pass codes]** button.

15. You can assign action codes to individuals that will print on the name badges. Action codes help your staff identify possible situations and/or conditions for a particular individual.



Click on the **[Manage Action Codes]** button.

This is where you go to create action codes. Click the **[Add Action Code]** button to create an action code.



16. Click the **[Assign Action Codes]** button.

This is where you go to assign an action code to an individual once it has been created.

Click the **[Assign Action Codes]** button and type in the name of the individual to which you want to add an action code.

If you are using Kiosks you can setup your Kiosk Theme and message. Simply click on the **[Kiosk**



Theme Wizard] button and follow the on screen prompts to create your own theme and message.