

Pass Validation User Guide (v4)





ACTIVE Network, LLC

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If you have any questions about the features included in these release notes, please contact the ACTIVE Net Support team using the information below.

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Pass validation overview

The new **Pass Validation** page has been updated with a new layout that includes more relevant information about your valid and invalid member scans. The new **Pass Validation** layout makes it easier to manage your invalid member scans and view a history of members who have scanned in during the day.

The new **Pass Validation** page combines the previous staff site pass validation page together with the existing Entry Point background scanning application to make a single unified interface that supports both scanning methods.

If your staff currently uses the **Pass Validation** page on the staff site to validate pass scans, then no configuration changes are needed for the pass validation process to work as before. Staff will notice a layout change on the **Pass Validation** page as described below, but they will be able to perform the same actions as before.

If your staff currently uses the Entry Point background scanning application to validate pass scans, then no configuration changes are needed for the pass validation process to work as before. However, you will now have the option to use the new Pass Validation page to view and track pass scans that were previously handled by the Entry Point background scanning application. See the Scanning Methods section below for more information.

The new **Pass Validation** page supports the same scanning hardware as previous versions of ACTIVE Net.

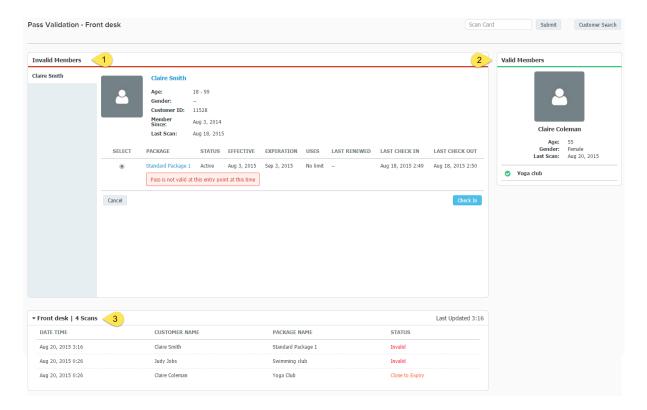
Location

Access the **Pass Validation** page at **Front Desk > Membership > Pass Validation**.





Overall layout



The layout of the **Pass Validation** page is illustrated above:

- 1. Invalid Members area
- 2. Valid Members area
- 3. Scan history area

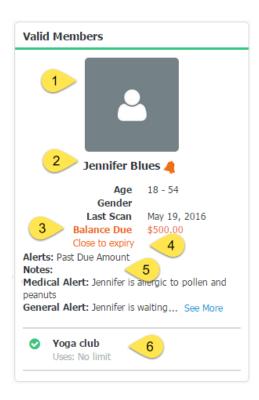
Note: You can show or hide specific customer information on the new **Pass Validation** page in the same way as on the previous **Pass Validation** page. To show or hide specific customer information:

- 1. Go to Administration > Membership Settings > Entry Points.
- 2. Select an entry point.
- 3. In the **Display Fields** section, enable the fields that you want to display, and clear the fields that you want to hide.
- 4. Click Save.





Valid Members area



When a customer scans a valid pass, the customer's image, name, and package name displays in the top right of the **Pass Validation** page.

This information remains on the page until replaced by another valid customer scan. There is no longer a countdown function that removes this information from the page after a specific time period.

Valid Members area layout

The **Valid Members** area includes the following elements:

- 1. Customer image
- 2. Customer information: name, age, gender, last scan time.
- 3. **Balance**: Displays the customer has an account balance if any.
 - For a member:

Balance Due: the total amount the member owes (no changes to this field).

Amount Due Now: the amount that the member must pay now (overdue amount + due now amount, but excludes scheduled payments).

For a member's family:





Family Balance Due: the total amount the member's family owes.

Family Amount Due Now: the amount that the member's family must pay now (overdue amount + due now amount, but excludes scheduled payments).

- 4. Membership information: Displays if this membership is close to expiry or has only one punch left. A membership is close to expiry if it is within the time period that you have specified at Administration > Membership Settings > Configuration > Scanning Sounds section > Pass Expiry within number Days. If you have not specified a scanning sound, then the "Close to expiry" message is not displayed.
- 5. **Customer Notes/Alerts**: Displays valid notes or alerts linked to this customer if any.
- 6. **Valid memberships**: Displays all of the customer's valid memberships or alternate keys display.

Multiple valid membership packages scan

If you have enabled the Multi Valid Packages Scan function, you can select one membership package to check in if the customer has multiple valid memberships.

Note:

For Team Axxess devices, the current ACTIVE Net version does NOT support the open gate function with Multi Valid Packages Scan.

To enable the Multi Valid Packages Scan function:

 Go to Administration Home > Membership Settings > Entry Points > Change Entry Point Detail > General section and select the Prompt for Package Selection radio box for Multi Valid Packages Scan Options.

Multi Valid Packages Scan Options	
 Auto Validation 	
Prompt for Package Selection	
Popup Confirmation Timeout in 10	seconds

 Once the Prompt for Package Selection radio box is selected, you can set the countdown time in Popup Confirmation Timeout in <> seconds. It is 10 seconds by default.

To alert staff users to select a package for a Multi Valid Packages Scan event, see Configure membership validation sound events.

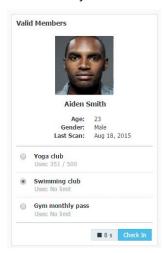
In the Valid Members area, if the Multi Valid Packages Scan Options is enabled and the scanned customer account has multiple valid





membership packages, then you can select one membership package and click **Check In**.

If you do not select a membership within the **Popup confirmation Timeout in <X> seconds** time, then the default membership package is automatically selected.



Quick family membership check-in/out

If you have enabled the quick family membership check-in/out function, you can check in/out other family members who share the same valid family membership package.

Note:

For Team Axxess devices, the current ACTIVE Net version does NOT support the open gate function with Quick Family Membership Checkin/out.

To enable quick family membership check-in/out:

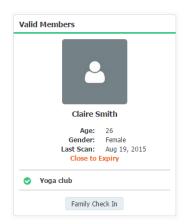
 Go to Administration Home > Membership Settings > Entry Points > Change Entry Point Detail > General section and select the "Allow Quick Family Membership Check-in/out?" check box.

Use Quick Family Membership Check-in/out:

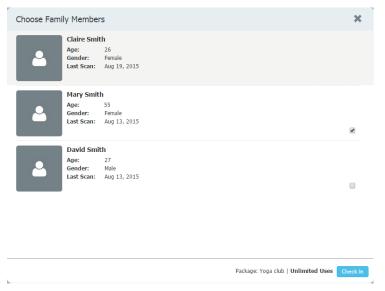
- 1. Open the **Pass Validation** page and scan the pass card.
- 2. If there is more than one valid membership package, select the family membership package.







3. Click the **Family Check In** button.



4. Select the family members and Click the **Check In** button.





Invalid Members area



When a customer scans an invalid pass, their customer and package information displays in the top left of the **Pass Validation** page. This information remains on the page until you either click **Cancel** or you click **Check In** to manually check in the customer regardless of their invalid pass.

If multiple invalid scans occur before you can process them, then each invalid name displays in a tab on the left. Click each tab and dismiss or check in at your convenience.

If there are no scans or all invalid scans have been cancelled or checked in, then **No Invalid Members** is displayed..

The Invalid Members area includes:

- Customer information: Displays information about the customer and their pass. Click the customer's name to open the Customer Account Functions page for that customer in a new tab.
 - **Note**: **ID** corresponds to the customer ID. **Identifier ID** corresponds to the membership or alternate key ID for this customer.
- Balance Due: Displays Balance Due for the customer. Click Balance
 Due to open the Balance page in a new tab. If there is no balance
 due, no information appears here.
- Customer Notes/Alerts: Displays valid notes or alerts linked to this
 customer if any. Click Customer Notes/Alerts to open the Customer
 Account Functions page in a new tab.
- 4. **Error messages**: If this customer has a balance for this membership package that is too large, an error message displays.
 - Note: A membership package balance is too large if it exceeds the amount that you have specified at **Administration > Membership Settings > Configuration > Auto Renewal** section > **Warn**





attendant if customer owes amount or more and the balance has been owing for number days or more.

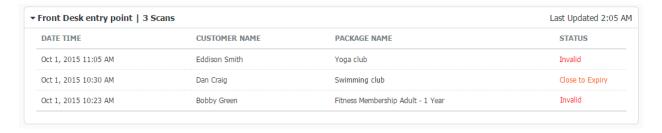
5. Packages:

- If this customer has any packages, they are listed in this area.
 Click a package name to view the **Membership Admin** page for the package.
- If this customer does not have any current packages, an error message displays and the **Check in** button disappears.
- 6. **Cancel**: Click **Cancel** to clear this customer's information from the **Pass Validation** page. The customer is denied entry.
- Check in: Click Check in to allow this customer entry regardless of their invalid status. If this customer has multiple invalid packages, then before clicking Check In, select the radio button next to the package to validate.
- 8. **Tabs**: Displays the name of each invalid customer who is not yet checked in or cancelled. Click the customer's name to view the page. Click the **X** next to a customer's name to quickly cancel the customer's validation attempt.





Scan history area

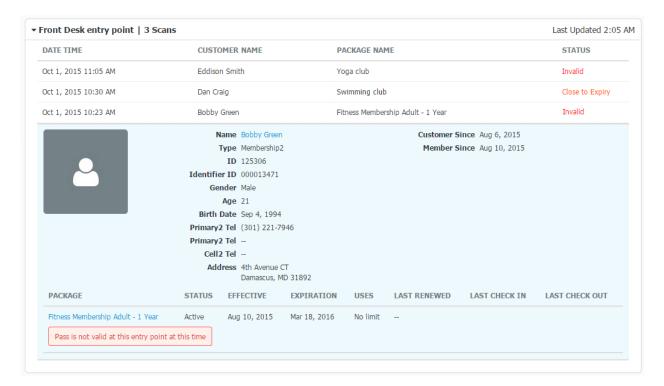


Recent scans displays at the bottom of the **Pass Validation** page. All **Valid** and **Invalid** scans for the current day for your entry point are shown. System users are now able to see scans from all workstations and Entry Point servers using the same entry point.

Note: When the Pass Validation page is open, scans from Entry Point servers are recorded in scan history. If not, scans are not recorded in scan history.

To sort the list of scans by status or by time, click the **STATUS** or **DATE TIME** column header.

To view details for a scan, click any row in the list. The row will expand to display customer and package information.







Scanning methods

If you already use the **Pass Validation** page on the staff site, then you do not need to make any configuration changes to use the staff site **Pass Validation** page with the new layout.

Refer to one of the following sections for more information for your scanning method.

Scanning with a keyboard input/keyboard wedge scanner on the Pass Validation page

If you currently validate passes using a keyboard input/keyboard wedge scanner, then you do not need to make any configuration changes to continue scanning passes on the new **Pass Validation** page:



- When you open the Pass Validation page, the cursor automatically focuses in the Scan Card box at the top right of the page. You can scan customer passes immediately.
- If the scanned number is linked to a valid membership package, then the customer appears in the Valid Members area. If the customer's membership package is not valid at the current entry point, then the customer appears in the Invalid Members area.
- The cursor remains in the Scan Card box after each scan, so you
 can continue to scan customers one after another. As long as you
 do not click elsewhere and move the focus from the Scan Card
 box, subsequent scans will complete successfully.
- If you need to work elsewhere on the page or in another tab, click the **Scan Card** box to restore focus and continue scanning.
 This process works in the same way as in the previous layout.
- You can also use the keyboard to manually enter a customer card number in the **Scan Card** box and then either press Enter or click Submit.

Scanning using the Entry Point service

If you currently validate passes using the Entry Point background scanning application, then no configuration changes are required to continue scanning passes as before.

If you want to use the new **Pass Validation** page to view and manage scans that made with the Entry Point background scanning application, then you must first:





1. Install the Entry Point server on the workstation on which you will view the **Pass Validation** page.

Note: Install the most recent version of the Entry Point server.

2. Configure the **Open Gate** button. See the **Open Gate** section below for more information.





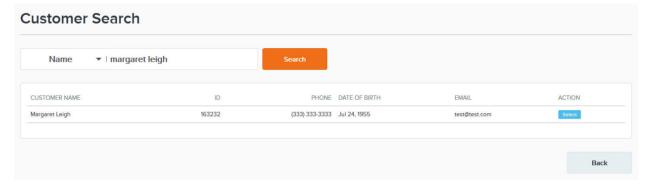
Customer search

You can manually search for customers who forgotten their passes using their pass or alternate key numbers, names, emails, phone numbers, or customer IDs.

To manually search for a customer:



1. Click **Customer Search** at the top right of the **Pass Validation** page.

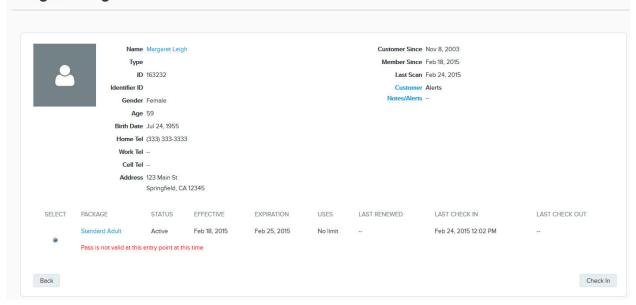


- 2. On the **Customer Search** page:
 - a. Select to search for the customer by their Alternate key
 ID, Customer ID, Email, Name, Pass Number, Scan
 Card (pass card number), or Telephone number.
 - b. Enter the number or text that you want to search for.
 - c. Press Enter or click Search.
 - d. Click **Select** to validate the customer.





Margaret Leigh



- 3. On the **Customer Validation** page, the customer's information appears, along with any alerts, passes or alternate keys that are linked to their account:
 - If the customer has no valid memberships or alternate keys, click **Back** to return to the **Customer Search** page.
 - Select a membership package to validate, if applicable.
- 4. Click **Check in** to validate the customer and return to the main **Pass Validation** page.





Temperature screening solution

For improved customer management, ACTIVENet provides a temperature screening (entry screening) solution, which allows staff users to screen customers using a temperature screening device before admitting them into a facility.

Enable and configure temperature screening

To enable the **Temperature Screening** feature, please contact your Account Manager.

Notes:

- ACTIVENet currently only supports UNI-T brand, model UTi165K Professional Thermal Imager devices.
- The Temperature Screening feature is NOT supported on entry points using an EP310, Serial or Team Axxess gatekicker.
 On these entry points, after a customer scans a member pass, the Entry Screening popup is NOT displayed, and the customer is automatically admitted without any entry screening.
- ACTIVENet does NOT record the temperature screening result for any person.
- The **Entry Screening** popup is displayed for every entry, however the decision to screen or not rests with the staff user.

This solution requires the following pre-requisites:

- A computer with the Windows 10 operating system and fewer than 10 camera devices
- A temperature screening device (UTi165K Professional Thermal Imager)
- A workstation with an entry point of any type other than the **Check-out only** type.

To configure temperature screening in the ACTIVENet AUI:

- If the ACTIVENet Workstation service is already installed and the Windows > Control Panel > Programs and Features window > Version field for the ACTIVENet Workstation
 Service displays 1.2.14 or 1.2.16, then go to step 2, otherwise install the ACTIVENet Workstation service on the computer. For more information about how to install the ACTIVENet Workstation service, please refer here.
- Enable the ACTIVENet Workstation service for your organization by selecting the Administration Home >
 System Settings > Configuration General page > Enable



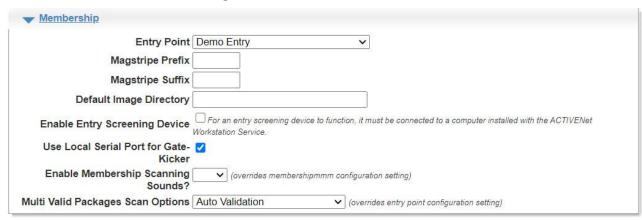


ACTIVE Net Workstation Service for Pass Validation & Pass Production setting.

Select the Administration Home > Membership Settings >
 Configuration page > Entry Screening section > Enable
 Entry Screening check box (disabled by default).



- In the Fail Screening Above section, select the required unit and enter the value above which to fail screenings. The entered value and unit will then be displayed for reference on the Pass Validation screen.
- For better accuracy, it is recommended to set the unit to °F.
- To enable the connection between the ACTIVENet AUI and the temperature screening device, select the Administration Home > System Settings > Workstations > select the above workstation > Membership section > Enable Entry Screening Device check box.

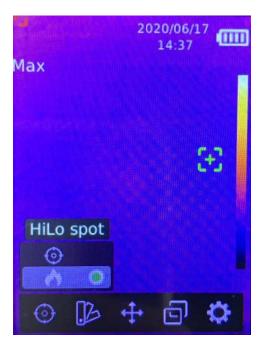


To configure a temperature screening device:

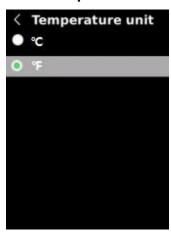
- Switch on the temperature screening device (UTi165K Professional Thermal Imager).
- Tap the (Measurement) icon and select (HiLo spot).



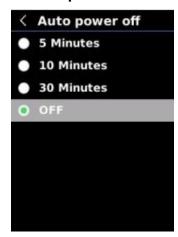




- 3. Tap the (Setting) icon:
 - o set the **Temperature unit** to **°F**:



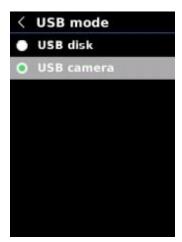
o Set Auto power off to OFF:







Set USB mode to USB camera:



 For more information about using the UTi165K Professional Thermal Imager, refer to the user manual for the device.

Connect the temperature screening device to the computer using the USB cable provided with the temperature screening device.

Perform temperature screening on a customer

After completing the above configuration, to perform temperature screening on a customer:

- 1. On the above computer, open the ACTIVENet AUI.
- 2. Login and select the above workstation.
- Open the Front Desk Home > Membership > Pass Validation screen. After scanning a membership pass or searching for and selecting a customer account, the following popup appears:







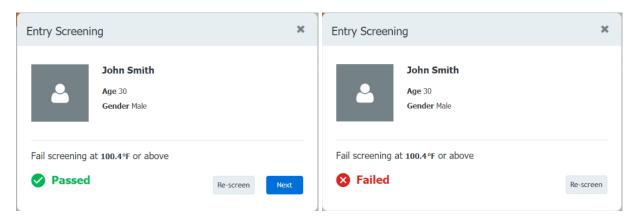
- 4. Ensure that the customer appears on the screen of the temperature screening device. When the [+] icon appears on the customer and the **Max** field displays a value, click **Screen**.
 - During check-out or to bypass temperature screening, click **Skip**.



 According to the configured Fail Screening Above threshold, the Entry Screening popup automatically displays either Failed or Passed:



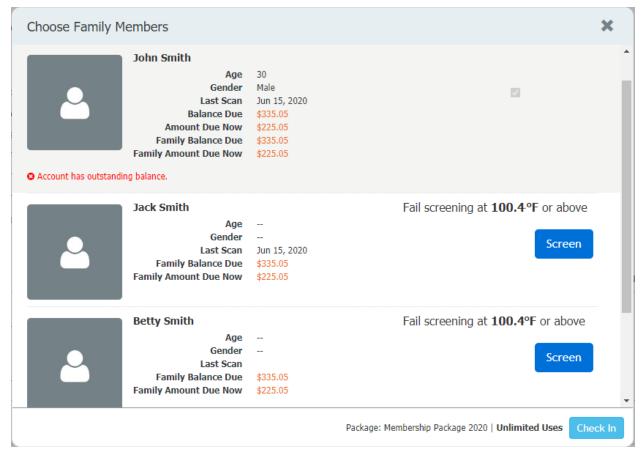




To re-screen the customer, click Re-screen.

For a customer who has **Passed** temperature screening, proceed with check-in by clicking **Next**.

6. If the customer passes temperature screening and selects to check in using a family membership, then the Family Check In button appears. Clicking the Family Check In button displays a list of family members. Staff users can then Screen each family member as required:





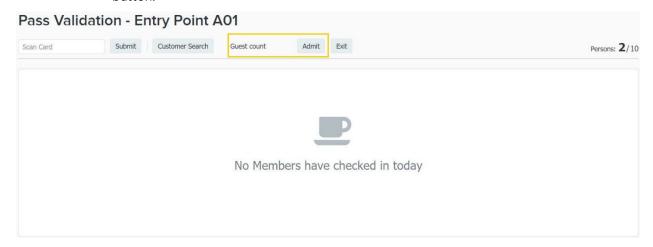


If the **Enable Entry Screening Device** checkbox is disabled, then the **Entry Screening** popup appears as below. Staff users can perform manual temperature screening using another device and click **Pass** to admit the customer or **Fail** to reject the customer:



Perform temperature screening for a guest or staff user

On the **Pass Validation** screen, when checking-in a guest or staff user, to perform temperature screening, click the **Guest Count** area > **Admit** button.



The following popup appears:







Use the temperature screening device to scan the guest or staff user (refer to <u>Perform temperature screening on a customer</u> for specific instructions on using the temperature screening device):







Track and limit the total number of people in a facility

To limit the total number of people in a facility, you can configure a warning capacity for a facility and monitor the number of people in the facility. A facility must be associated with multiple **Check in & out Entry** type entry point.

To configure a facility with a warning capacity:

- On the Administration Home > Membership Settings > Entry Points page > create or select an entry point > Change Entry Point page, click the Facility dropdown and select the required facility.
- 2. Select the **Check in & out Entry** radio button:
- 3. Select the **Track the number of persons** check box.
- (Optional) To allow non-member guests to check in to the facility, select the **Allow guest check-in** check box. If this setting is enabled, then on the **Pass Validation** screen, the **Guest count** is displayed.
- 5. In the **Warning Capacity** field, enter the number of people in the facility (lower than the maximum capacity) at which a warning will appear on the **Pass Validation** screen.
- 6. In the **Set Maximum Capacity** field, enter the maximum number of people allowed in the facility. If this field is left blank, then the **Pass Validation** screen > **Persons** field displays **NA** for the maximum capacity:

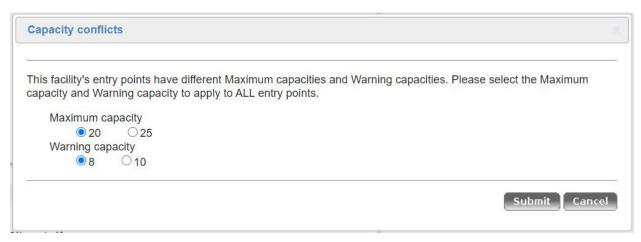
Persons: 1/NA

- 7. Click Save.
- 8. To configure any other entry points, repeat the above steps.

 If the facility's entry points have different maximum or minimum capacity settings, then on saving an entry point, the following popup appears and staff users must set the same capacities on all entry points.

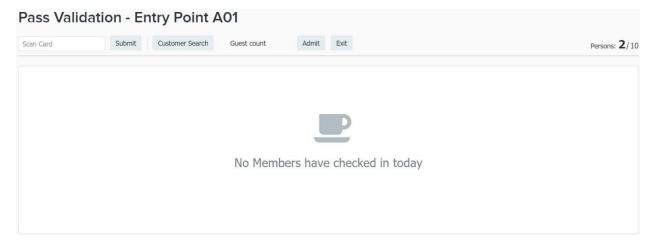






To check-in and check-out customers, login to the ACTIVENet AUI and select a workstation configured with the above entry point. On the **Front Desk Home > Membership > Pass Validation** screen:

- For members, the check-in and check-out processes remain the same.
- For non-member guests, in the Guest count area, click the Admit button to admit a guest. When a guest leaves, click the Exit button.



The **Person** field at the top-right corner displays the number of admitted customers and the configured maximum capacity. When admitted customers in the facility are at or above the specified warning capacity, a warning message is displayed on the **Pass Validation** screen.





Sign an obligatory waiver

If an obligatory waiver has been setup in your organization, then for customers who have not yet signed the waiver:

 In the AUI, on the Front Desk Home > Membership > Pass Validation page, after scanning a customer's member pass or searching for and selecting a customer account, the following window is displayed.







Open gate button

If you use a gatekicker and want to use the new **Pass Validation** page, then you can now manually open your gate or turnstile to allow entry for someone without valid membership credentials at your entry point.

To enable the **Open Gate** button on the new **Pass Validation** page, enable one of the following options:

- The "Gated entry point?" option at Administration >
 Membership Settings > Entry Points > Scan/Gate Fields
 section for this entry point.
- The Use Local Serial Port for Gate-Kicker option at Administration > System Settings > Workstations > Membership section for this workstation.

To manually open the gate for your entry point, once you have enabled this button:

Open Gate

 At the top right of the Pass Validation page, Click the Open Gate button.

Note:

For Team Axxess devices, the current ACTIVE Net version only includes open gate functionality due to device API limitations for the following scenario:

The quick family membership check-in/out function is disabled and there is only one valid membership package on the pass card.





Membership validation sound events

Configure membership validation sound events

Sound events that play in specific situations on the **Pass Validation** page work as before. To configure system-wide sound events:

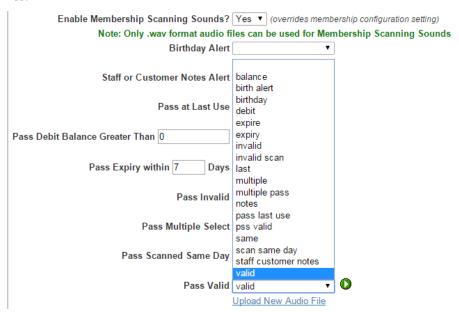
 Go to Administration > Membership Settings > Configuration > Scanning Sounds section.

To override system-wide sound events for a specific workstation:

Go to Administration > System Settings > Workstations > select a workstation > Membership section > Enable
 Membership Scanning Sounds?

To add a sound for a specific event, execute the following steps:

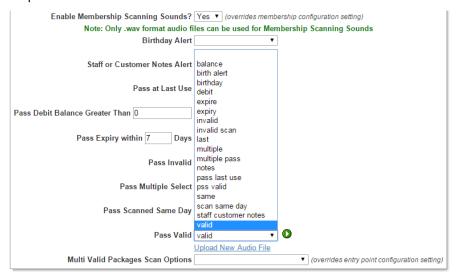
 At the system-wide level or a specific workstation level, in the "Enable Membership Scanning Sounds?" dropdown list, select Yes.







2. For example, to set a sound to the **Pass Valid** event, click the dropdown list next to **Pass Valid**.



 You can select a default sound from the dropdown list or click Upload New Audio File to upload a local audio file to ACTIVE Net.

A new Pass Multiple select sound has been added

To play a sound when a staff user is required to select a valid membership package for the customer, select a sound for this option.





Configuration changes

Since the new pass validation page incorporates the old staff site pass validation page and the Entry Point application into a single interface, some configuration options are no longer necessary.

The following configuration options have been removed:

- Show Custom Questions and Answers during Pass Validation

 Membership package custom questions and answers are no longer displayed on the Pass Validation page.
- Confirm Valid Passes When a customer scans a valid pass, they display in the Valid Members area, and their valid memberships will always display, along with their balance and a warning if the pass is about to expire.
- **Popup Confirmation Timeout** The new **Pass Validation** page no longer requires a countdown timer.
- Manned/Unmanned Entry Point –This distinction is no longer needed because the Pass Validation page can now be used for both manned and unmanned entry points.

The following configuration options have been added:

- Administration > Membership Settings > Entry Points >
 select an entry point > Scan/Gate Fields section > Gated entry
 point? Use this option to specify if this entry point uses a
 network gatekicker. If so, then enter the IP address and port of
 your Entry Point server so that ACTIVE Net can signal it to open
 the gate.
- Administration Home > Membership Settings > Entry Points
 > Change Entry Point Detail > General section > Multi Valid
 Packages Scan Options Use this option to enable/disable multi valid packages scan function at the entry point level.
- Administration Home > System Settings > Workstations >
 Change Workstation Detail > Membership section > Multi
 Valid Packages Scan Options Use this option to
 enable/disable multi valid packages scan function at the
 workstation level.
- Administration Home > Membership Settings > Entry Points
 > Change Entry Point Detail > General section > Allow Quick
 Family Membership Check-in/out? Use this option to





enable/disable Quick Family Membership Check-in/out function at the entry point level.

