ACTIVENet

ACTIVENet Connect user guide
(v1.43)

ACTIVE Network, LLC

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ACTIVE Network, LLC
Dallas Corporate Office
5800 Granite Parkway – 12th Floor
Plano, Texas 75201
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About ACTIVE Network, LLC

ACTIVE Network, LLC is a technology and media company that helps millions of people find and register for things to do and helps organizations increase participation in their activities and events.

For more information about ACTIVE Network, LLC products and services, please visit ACTIVEnetwork.com.

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

Phone: 1-800-663-4991

Email: activenetsupport@activenetwork.com

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ACTIVENet Connect overview

The ACTIVENet Connect app is intended for use on an Apple iPad or iPad mini. ACTIVENet Connect:

- Enables staff users to check-in kids to a Child Care/Flex Registration program, check-in participants to an activity or check in to or out of membership entry points using a portable tablet, instead of a PC.

- Provides a consolidated and efficient check-in and check-out workflow for Child Care/Flex Registration programs, activities and membership packages.

- Has a modern and user-friendly interface and provides a better user experience.

- Helps staff users retrieve past attendance information.

- Reduces paper consumption.

Enabling the ACTIVENet Connect license

To access ACTIVENet Connect, you must have a valid ACTIVENet Connect license. To enable your ACTIVENet Connect license, please contact the ACTIVENet support team (activenetsupport@activenetwork.com).

- For an organization with this license, all users can log in to the Production site of ACTIVENet Connect.

- For an organization without this license, users cannot log in to the Production site of ACTIVENet Connect.

System requirements

Before using ACTIVENet Connect, check if your tablet is supported:

- iPad and iPad mini
- iOS 10.0 or higher (the latest version is recommended)

Note: Only landscape view is supported.

Downloading and installing ACTIVENet Connect

To download ACTIVENet Connect, open the iOS App store, search for 'ACTIVENET Connect' and install the app.

Upgrading ACTIVENet Connect

The two most recent versions of ACTIVENet Connect are supported, so that you can upgrade ACTIVENet Connect at your convenience.

Once ACTIVENet Connect is run, if it is:

- the current version, then the **Login** page is displayed, and you can continue to login.
- the previous version, then you can ignore the reminder or upgrade the app.
- an out-of-date version, then you are required to upgrade their app.

Running ACTIVENet Connect

To run ACTIVENet Connect, tap the **CONNECT** icon:
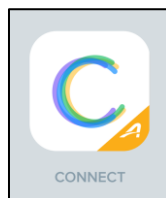
Checking your permissions

If you can use your ACTIVENet AUI user account in the AUI to check kids in to and out of Flex Registration programs, then you can use the same user account for ACTIVENet Connect.

If your user account does not have permission to view programs and check-in/out kids, then:

1. Go to **AUI > Administration > System Settings > System User Profiles**.

2. Select the profile for your user account.

3. In the **Function Options** section, move the **Customer**, **Front Desk/Administration: Daycare – Daycare (Multi-Site)**, and **Front Desk: Population/Administration: Daycare – Program Sessions** permissions to the **Full Access** list.

4. Save the profile.

If your user account does not have permission to view activities and check-in participants, then:

1. Go to **AUI > Administration > System Settings > System User Profiles**.

2. Select the profile for your user account.

3. In the **Function Options** section, move the **Administration: Registration - Activity Attendance** permission to the **Full Access** list.

4. Save the profile.

Enabling ACTIVENet Connect modules

To access ACTIVENet Connect, in the **Administration Home** > **System Settings** > **Configuration – General** page > **ActiveNet Connect Access** section, enable or disable required ACTIVENet Connect modules

- Check-In:
    o FlexReg
    o Activity
    o Membership
- Enroll:
    o Activity

- Others
  - o Account Creation
  - o Cash Summary
  - o Waiver Management

# Customizing check-in and check-out processes

To customize Child Care/FlexReg and Child Watch program check-in and check-out processes for your organization:

1. Go to the **ACTIVENet AUI** > **Administration** > **System Settings** > **Configuration - General** page > **Active Net Connect Setting** section.
2. Enable or disable the required options.
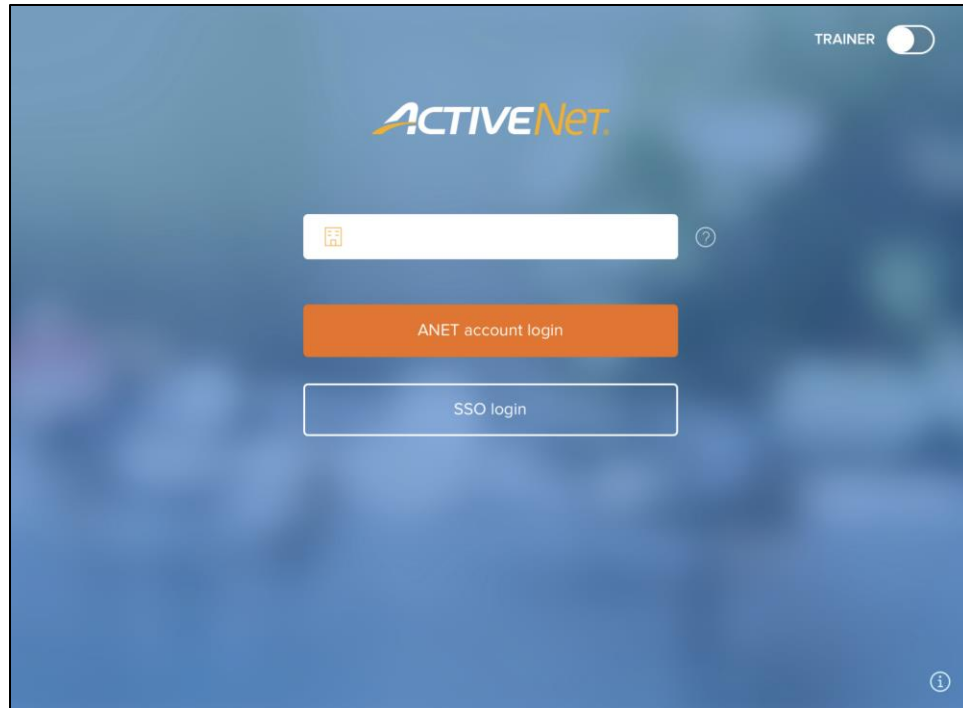
![ACTIVENet logo]

Signing in to ACTIVENet Connect

To sign in to ACTIVENet Connect:
1.   Tap the **ActiveNet** option:
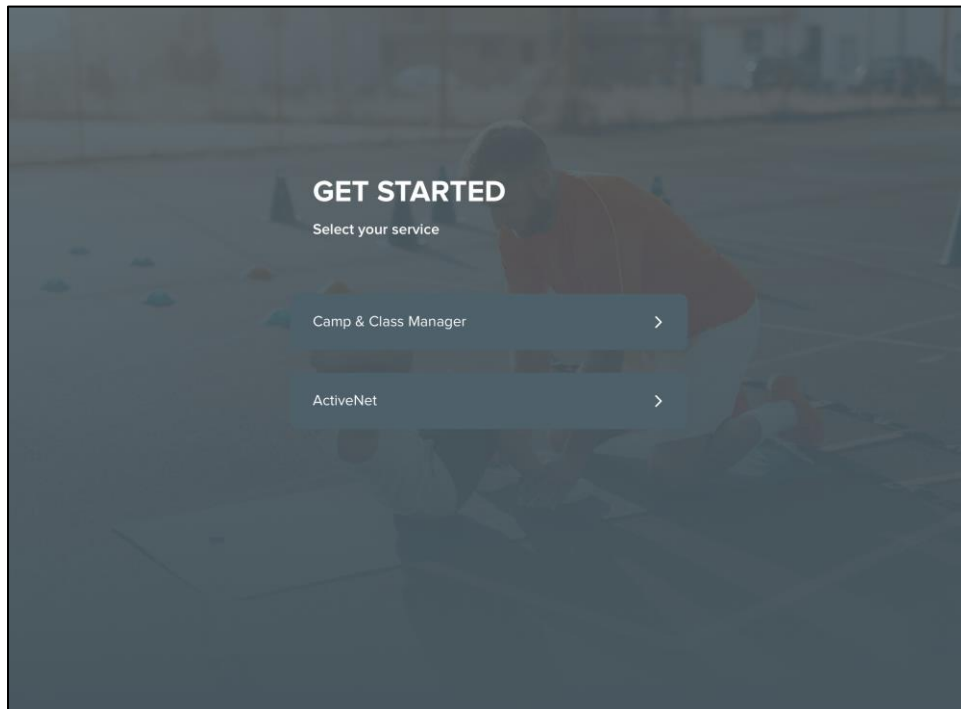
2.   Enter your **Organization Name** (if you are prompted to use **active.com** to sign in, then tap **Continue**).
   - If you are a first time user, click the **?** icon to learn how to locate your organization name.
   - To sign in to the ACTIVENet Connect trainer site, on the top right corner, select the **Trainer** site radio button. Once you have logged in to the **Trainer** site, on the top-left corner, ACTIVENet Connect displays ![TRAINER icon].

![ACTIVE network logo]

3. Enter your **Email address** and **Password** and then tap the **Sign in** button (if you have an invalid password, then you may be directed to open ACTIVENet in a web browser and change your password first).

- To extend the time duration for which you will remain signed-in, select the **Stay signed in** checkbox.
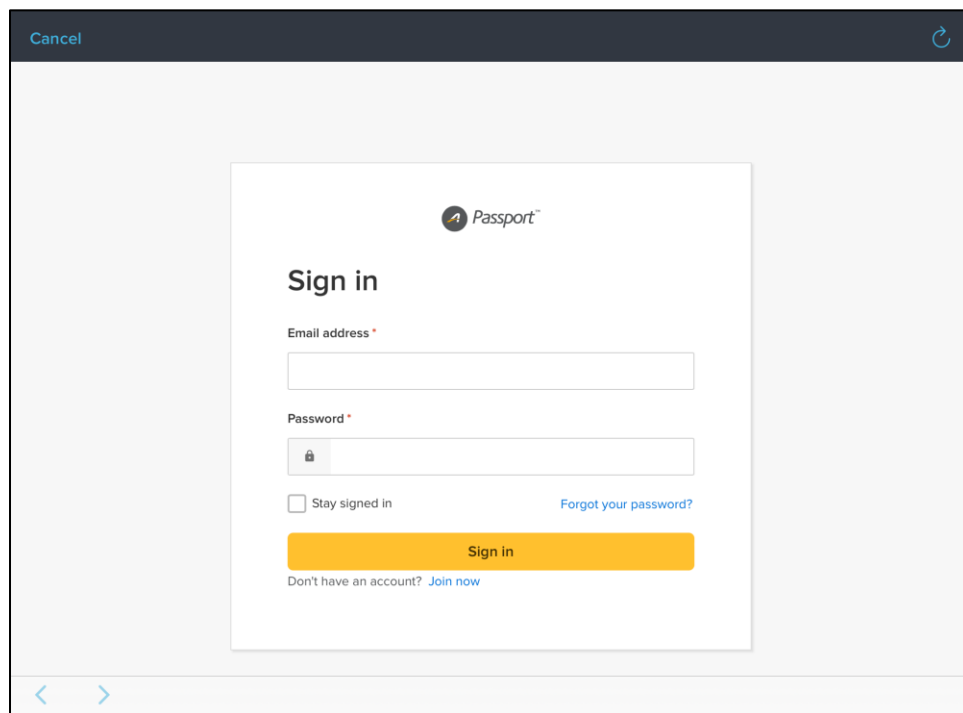
4. Enter the verification code sent to your mobile phone or email address (depending on the configuration of your account).

- Selecting the **Don't ask again on this device after verifying** checkbox skips the **Verify your identity** step for future sign ins on this device.
- If your account does NOT have a mobile phone number, then you may be prompted to optionally enter and verify a mobile phone number.
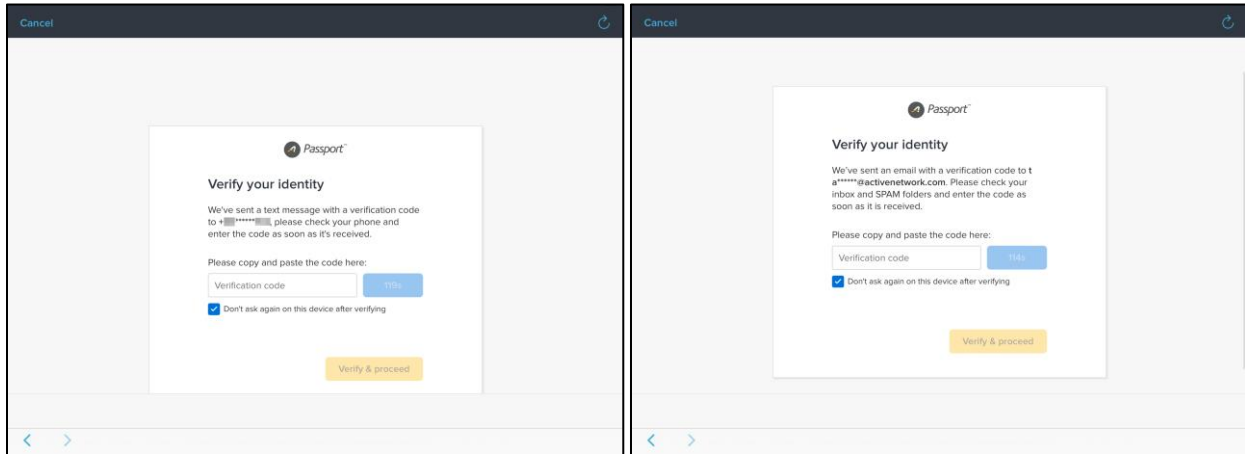
5. Select your location.
   - If the **ACTIVENet AUI > Administration Home > System Settings > System Users > Change System User** page > **Site** > **All Sites** check box is selected, all locations are displayed.
   - If the **ACTIVENet AUI > Administration Home > System Settings > System Users > Change System User** page > **Site** > **All Sites** check box is NOT selected and a site is selected from the sites dropdown menu, then locations under the selected site are displayed.

If you have enabled the cash summary sheet feature by selecting the **ACTIVENet AUI** > **Administration** > **Financial Settings** > **Configuration** > **Financial Options** section > **Run Cash Out Process Based on** setting > **Cash Summary Sheet** option. **(Cash summary sheet is on iOS only)**

When the **ACTIVENet AUI** > **System Setting** > **Workstation** >**Cash Summary** > **Cash Summary Sheet Prompt** is set to:
- **Prompt when user logged on**:
  - ◆ if the workstation does not have a cash summary sheet, then once logged-in, staff users are required to enter their current float amount to create a new cash summary sheet for the workstation.

Confirm Float Amount

Please count the beginning balance

$ [0.00]

[Cancel] [**Apply**]

◆ if the workstation has at least one cash summary sheet, then once logged-in, staff users are required to select or create a cash summary sheet and then enter the current float amount.

Cash Summary Sheet Confirmation

Organization   Front Desk

Please select a cash summary sheet opened from Aug 28, 2019.

＋ Create Cash Summary Sheet

CSS ID 584   **System User**   Smith Blue
Status: New   CSS Layout: –
Opened Date: Aug 28, 2019 17:13   Last Modified Date: Aug 28, 2019 17:13

[Cancel] [Apply]

- **Prompt when payment is taken**:
  - ◆ if the workstation does not have a cash summary sheet, then during a single login session, for the first payment, staff users are required to enter their current float amount to create a new cash summary sheet for the workstation.

  - ◆ if the workstation has at least one cash summary sheet, then during a single login session, for the first payment, staff users are required to select or create a cash summary sheet and then enter their current float amount.

Signing in to ACTIVENet Connect using SSO (iOS only)

ACTIVENet Connect also supports Single-Sign-On (SSO). On the login page, after entering the organization name, if the organization has configured and enabled the SSO feature, then the user can select to log into ACTIVENet Connect by either:

- Using their ACTIVENet account, by tapping the **ANET account login** button and then entering their **Email address** and **Password**.
- Using SSO, by tapping the **SSO login** button and then on the organization's login page, entering their username and password.
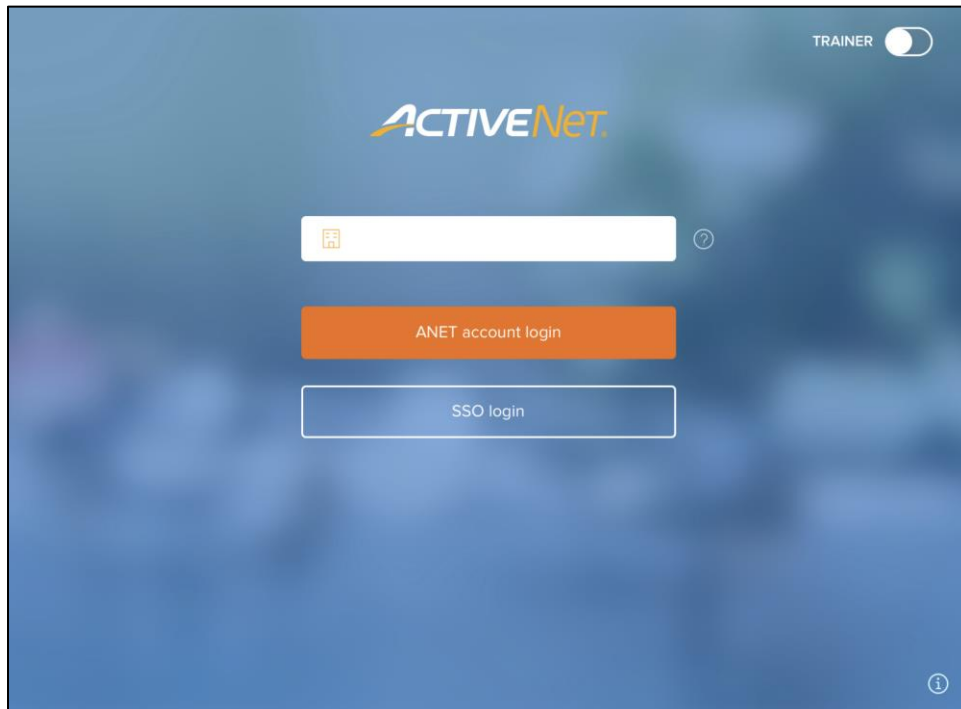
Note:

- Sign-ins using SSO are also supported in Kiosk mode.
- If the SSO feature is not enabled for your organization, then the login page remains the same as in the Signing in to ACTIVENet Connect section.

Signing out of ACTIVENet Connect

To sign out of ACTIVENet Connect, on the top-left corner, tap the ≡ button, and then the **Sign Out** button. You are directed back to the sign-in page.

Overall layout

Refer to Enabling ACTIVENet Connect modules to enable the required modules.
On the top-left corner, click the ≡ icon to switch among different modules.

ACTIVENet Connect consists of (if all modules are enabled):

- Check-In modules:
  - FlexReg: contains the following tabs:
    - The **Programs** tab

      The **Programs** tab is the default homepage for ACTIVENet Connect. The **Programs** tab displays Flex Registration programs with sessions on the selected day. Program times, names and locations are displayed.

      Programs are listed chronologically by session start time.

      For more information, refer to The Programs tab.
    - The **Kids** tab

      The **Kids** tab alphabetically lists the names of all kids who are participants on the selected day. To search for a kid, either enter the child's name in the search box or tap the initial letter of the child's last name.

      For more information, refer to The Kids tab.
    - The **Child Watch** tab **(iOS only)**

      Organizations that offer a drop-in Childwatch service can use the Childwatch tab to manage their childwatch service.

      For more information, refer to The Childwatch tab.
    - The **Child Details** page

    In the Child Care/Flex Registration module, selecting a kid opens the **Child Details** page, for Checking a kid in to or out of a Childcare program or Viewing and updating a kid's information.
  - Activity: contains the following tabs:
    - The **Activities** tab displays **activities** on the selected day. General activity information such as activity times, names and locations are displayed.

      Activities are listed chronologically by start time.

      For more information, refer to The Activities tab.
    - The **Participants** tab alphabetically lists the names of all participants on the selected day. To search for a participant, either enter the participant name in the search box or tap the initial letter of the participant's last name.

      For more information, refer to The Participants tab.
    - The **Participant Details** page

In the Activity module, selecting a participant opens the **Child Details** page, for Checking in a participant to an activity or Viewing and updating a participant's information.

- o Pass Validation: **(iOS only)**

  - ➢ The **Pass Validation** page displays the check-in or check-out history for the selected entry point. To search for customers, validate customer passes or alternate keys and allow customers to gain access to a facility entry point, refer to Check-in and check-out customers.

- • Enroll modules: **(iOS only)**

  - o Activity:

    - ➢ The home page of the Enroll Activity module defaults to the activity list for the selected center. Staff users can search for activities and enroll a customer into an activity. For more information, refer to Enrolling a customer into an activity.

- • Others:

  - o **Account Creation**: **(iOS only)**

    - ➢ The **Account Creation** page enables users to create new customer accounts. For more information, refer to Creating a new customer account.

  - o **Cash Summary**: **(iOS only)**

    - ➢ The **Cash Summary** module enables users to search for and manage cash summary sheeting using an iPad. For more information, refer to The Others > Cash Summary module.

  - o **Waiver Management**: **(iOS only)**

    - ➢ The **Waiver Management** module enables users to view waiver statuses and request customers to sign unsigned waivers. For more information, refer to The Others > Waiver Management module.

  - o The **Settings** page

    - ➢ To configure ACTIVENet Connect, tap the ☰ icon and then tap the **Settings** button. For more information, refer to The Others > The Settings page.

In the customer list, customer search result list and check-in/out screen, customer avatars are displayed with:

- o 🔔: A red bell icon for customers with alerts.

- o ![bell icon]: An orange bell icon for customers with notes but without alerts.

- o ![red dollar icon]: A red dollar icon for customers whose balance due now is greater than zero.

- o ![orange dollar icon]: An orange dollar icon for customers whose balance due is greater than zero.

- o ![medical icon]: if medical alerts for a customer has been entered, then this icon appears on the participant's avatar.

- o ![staff notes icon]: If staff users have entered staff notes for a customer, then this icon appears on the customer's avatar.

- o ![waiver icon]: customer accounts with an unsigned waiver due in the future are displayed with this icon.

- o ![overdue waiver icon]: customer accounts with an overdue unsigned waiver are flagged with this icon.

For example:
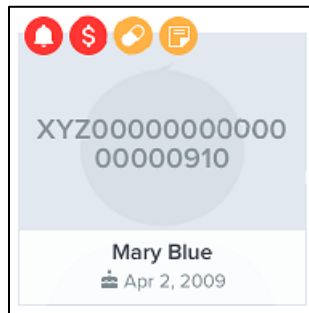
![ACTIVENet]

Kiosk mode

In Kiosk mode:

- Program participants (or participants' parents) can self-check-in to/check-out from their programs and/or activities (depending on the configuration in ACTIVENet) on the current date by scanning their QR code with the camera.
  - Standard kiosk mode requires the participant to select into which programs/activities to check in.
  - **Fast mode** checks in a participant to all their programs/activities on the current date.
- Consumers can self-signup for or renew a membership.

Configuring and launching kiosk mode

To configure kiosk mode, tap ≡ > **Kiosk Mode**:
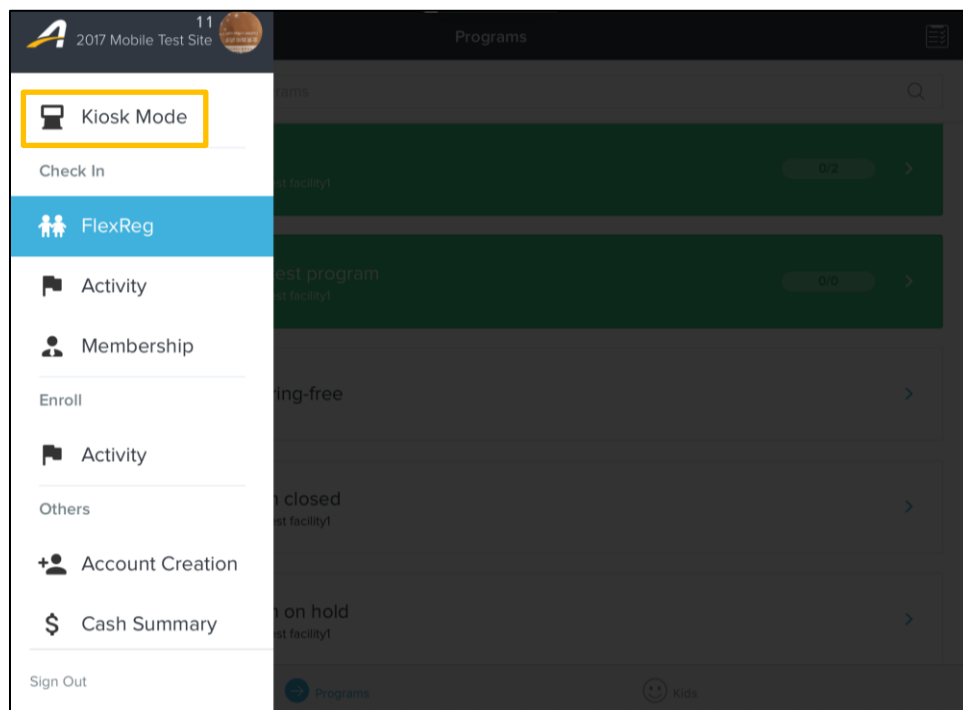
Kiosk modes which are:

- Switched off are not available for configuration or launch.
- Switched on are either:
  - Configured and launchable are marked **Ready to launch**.
  - Unconfigured and can be configured by tapping the **Go to setup** link.

![ACTIVE network]
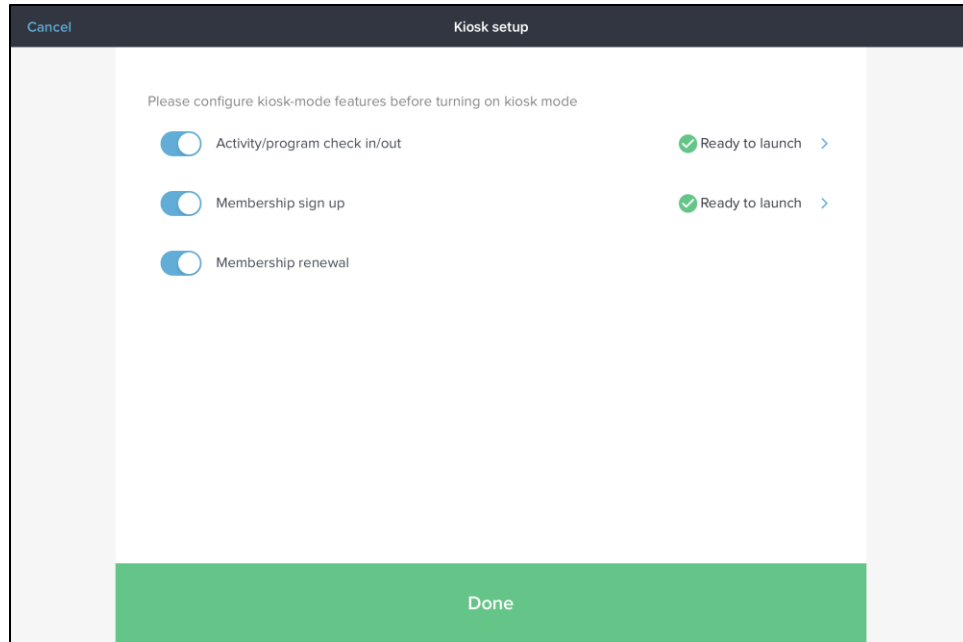
Configure specific kiosk modes as follows:

Configuring activity/program self-check-in and program self-check-out

1. Tap **Activity/program check in/out** > **Go to setup** or **Ready to launch**.
2. Select the center (if not selected at login), facility and date range (**Note**: changing the center or facility will unselect any currently selected **Activities** and/or **Programs** for self-check-in).
3. Select the **Activities** and/or **Programs** to be available for self-check-in:
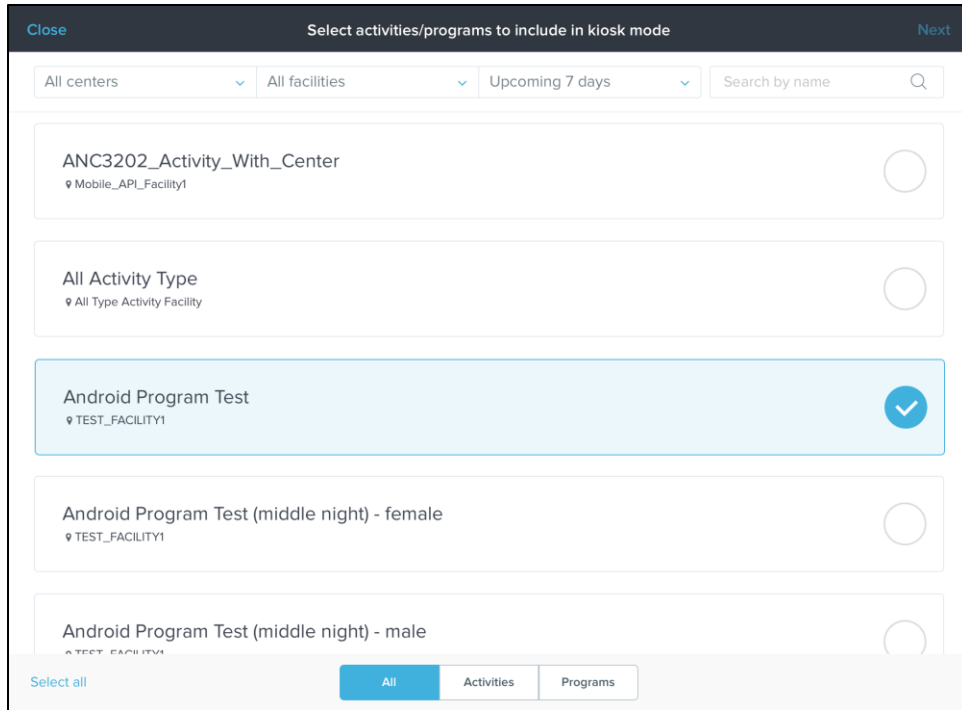
4. Tap the **Next** link, then confirm the selected activities/programs by tapping the **Done and Next** button.
   - To remove any unwanted activities/programs, tap the corresponding × icon
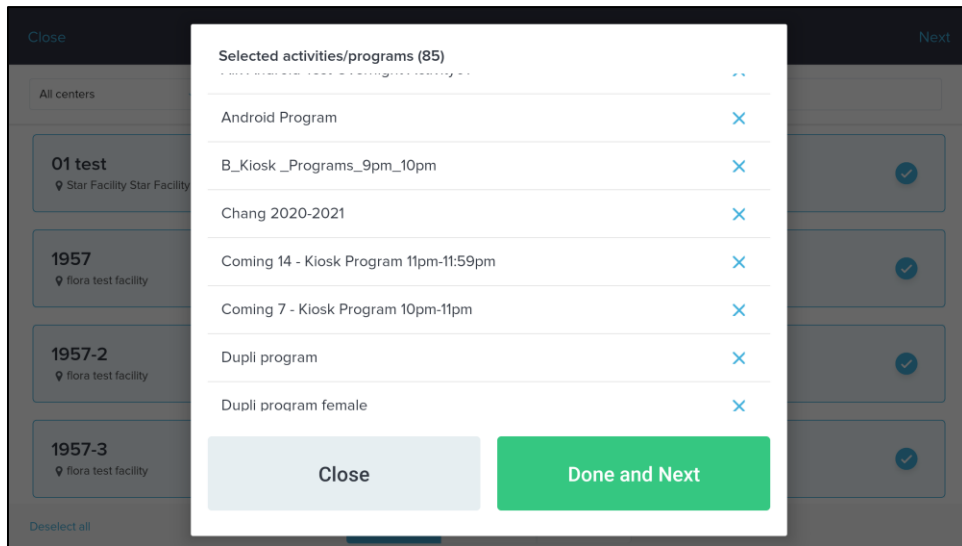
5. To check-in participants to all their programs and/or activities on the current date, switch on **Fast mode**:
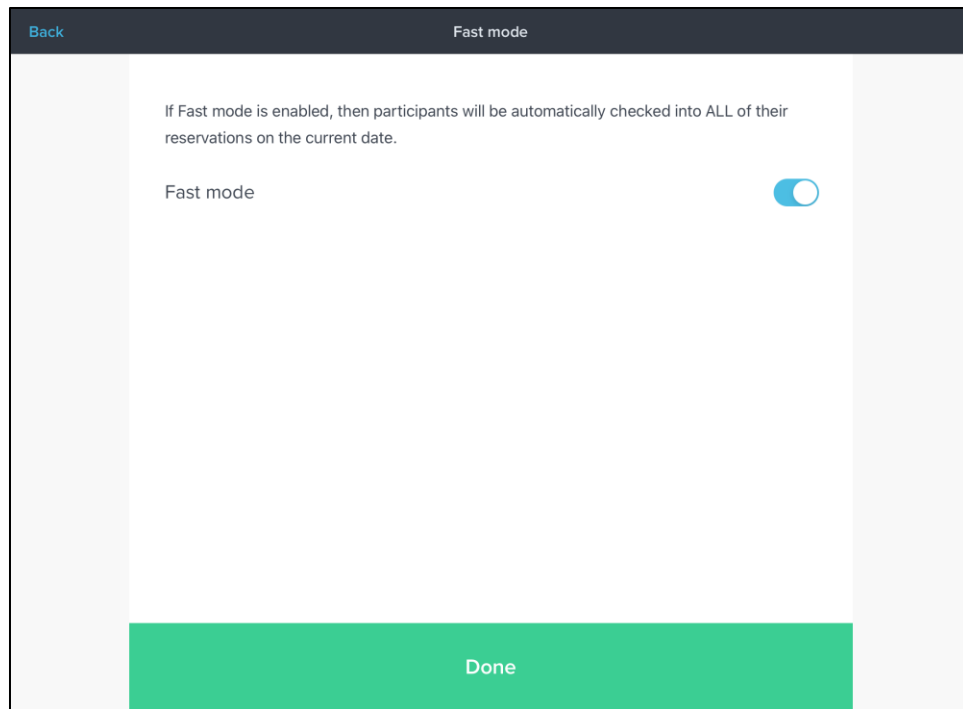
6. Tap the **Done** button.

Configuring membership self-signup

1. Tap **Sign up membership** > **Go to setup** or **Ready to launch**.
2. Select the memberships available to consumers to self-signup.
    *   To filter the displayed memberships, select the required membership sites, categories, types (**Individual**, **Dual**, **Group** or **Family**) and ages.
    *   To search for specific memberships, enter the membership package name in the **Search by name** box.
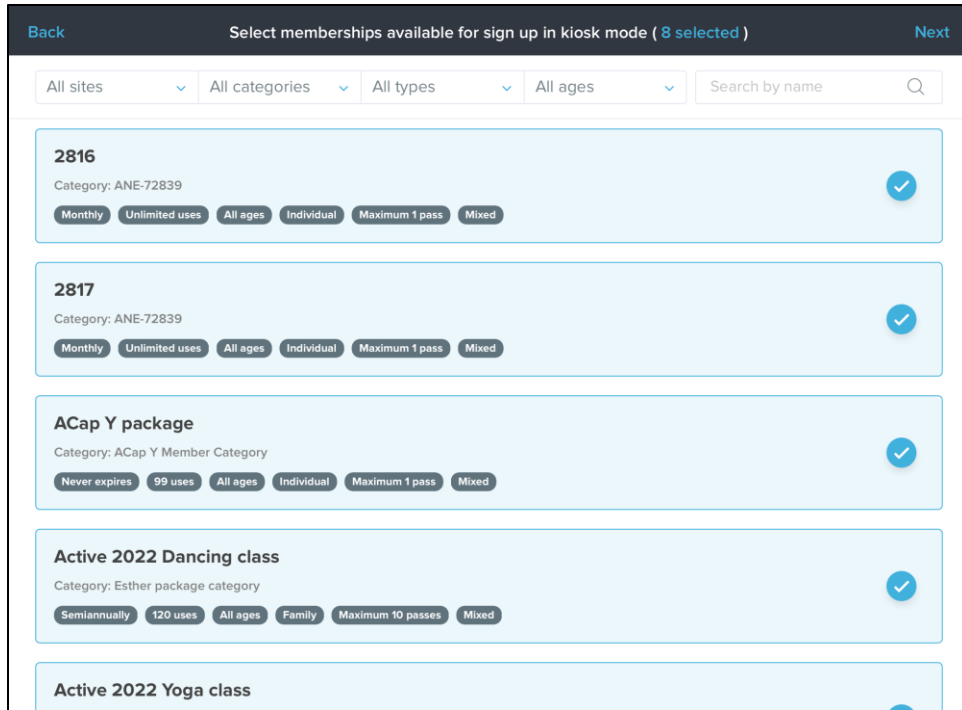
3. To review the selected memberships, tap the **# selected** link:
   - To remove a membership package, tap the corresponding × icon.
   - To rearrange the order of membership packages, tap a ☰ icon and drag the corresponding membership package to the required position.
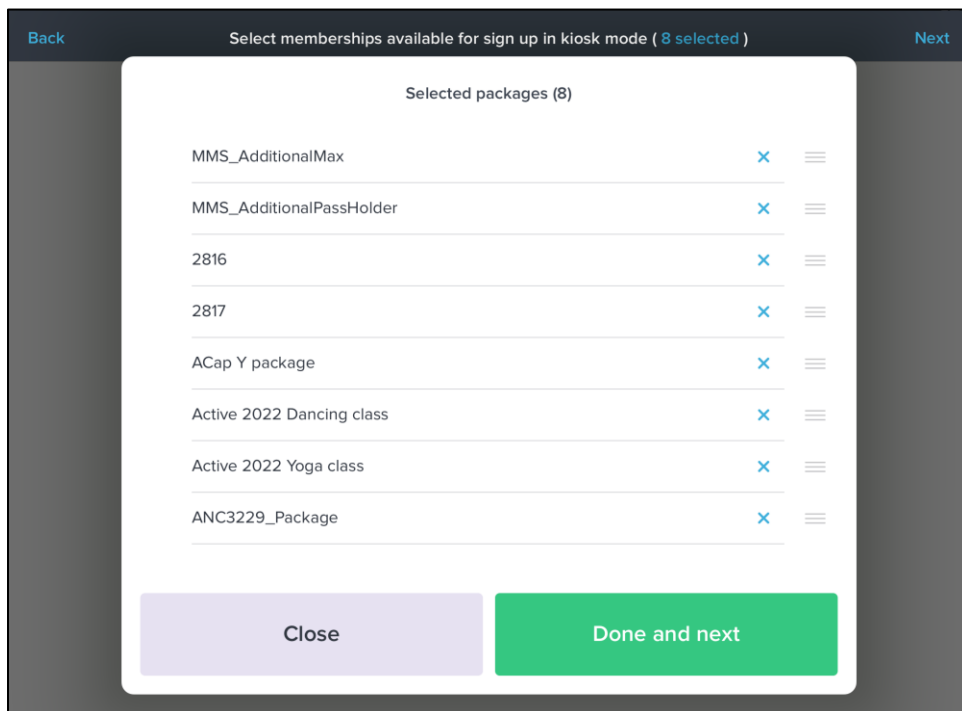
4. Tap the **Done and Nex**t or **Next** links to preview the membership package sales screen:

    - Select a marketing badge for a membership package by tapping the **Select a marketing badge** dropdown. Create a custom marketing badge for a membership package by selecting **Custom badge** and then entering the required badge text.
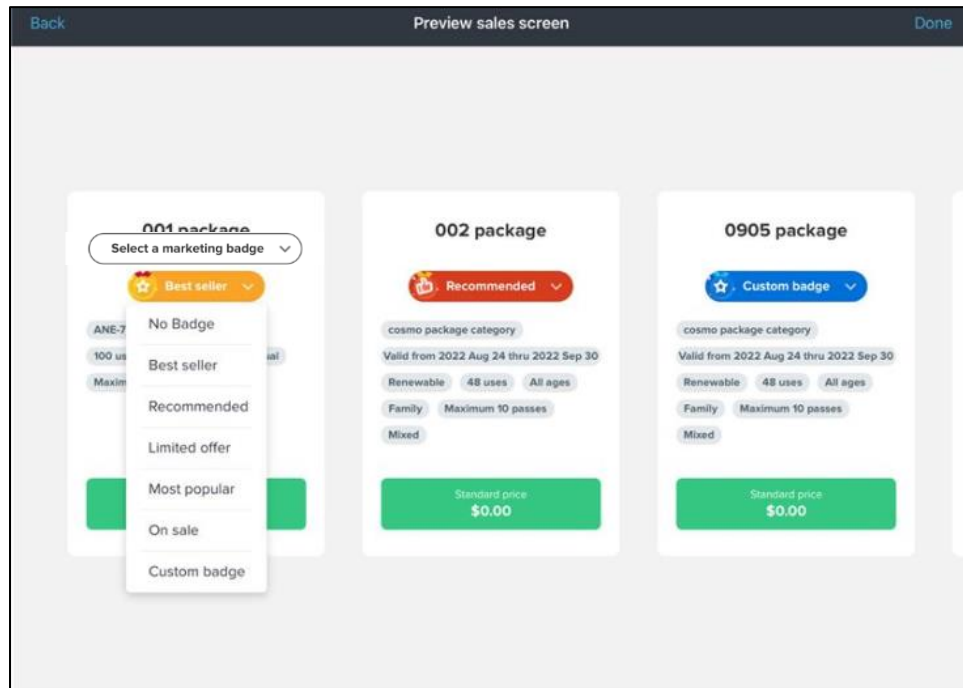
5. Confirm the selection of memberships available to consumers to self-signup by tapping the **Done** link.

Configuring membership self-renewal

To enable consumers to self-renew their memberships in kiosk mode, turn on the **Membership renewal** switch (no other configuration is required for the membership self-renewal kiosk).

Launching kiosk mode

To launch all switched on and configured (**Ready to launch**) kiosks, tap the ≡ > **Kiosk Mode** > **Done** button:

ACTIVE network.
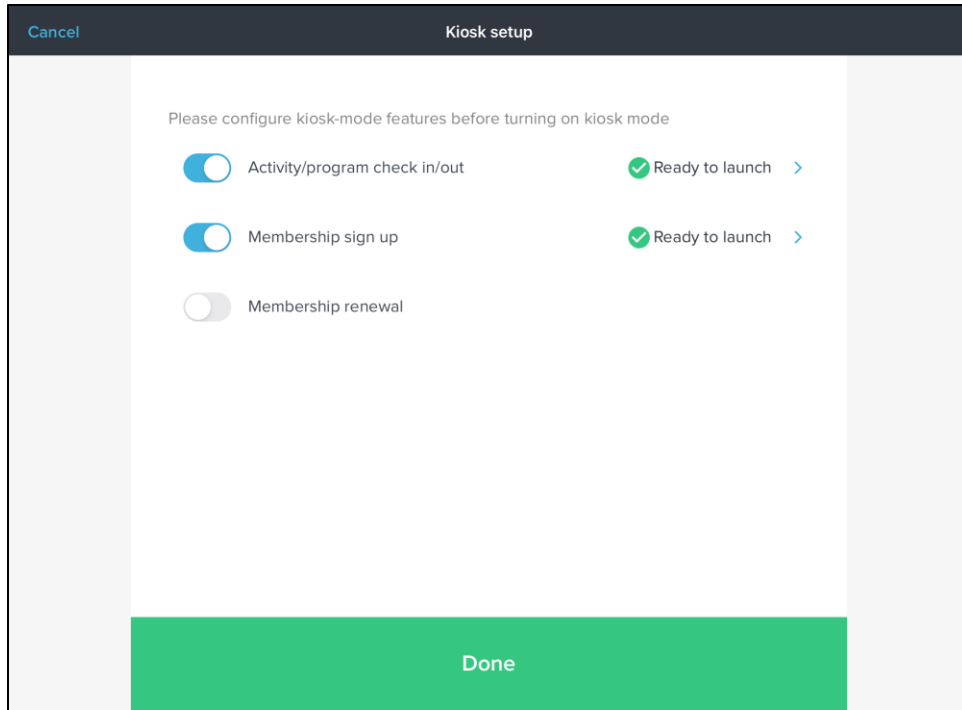
Consumers can then select the required kiosk by tapping the corresponding button:
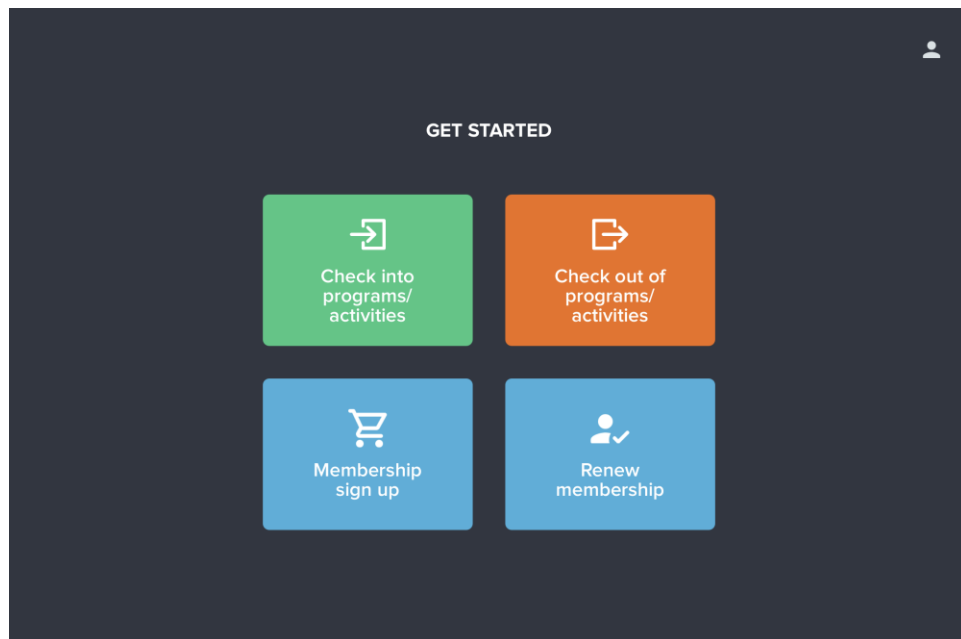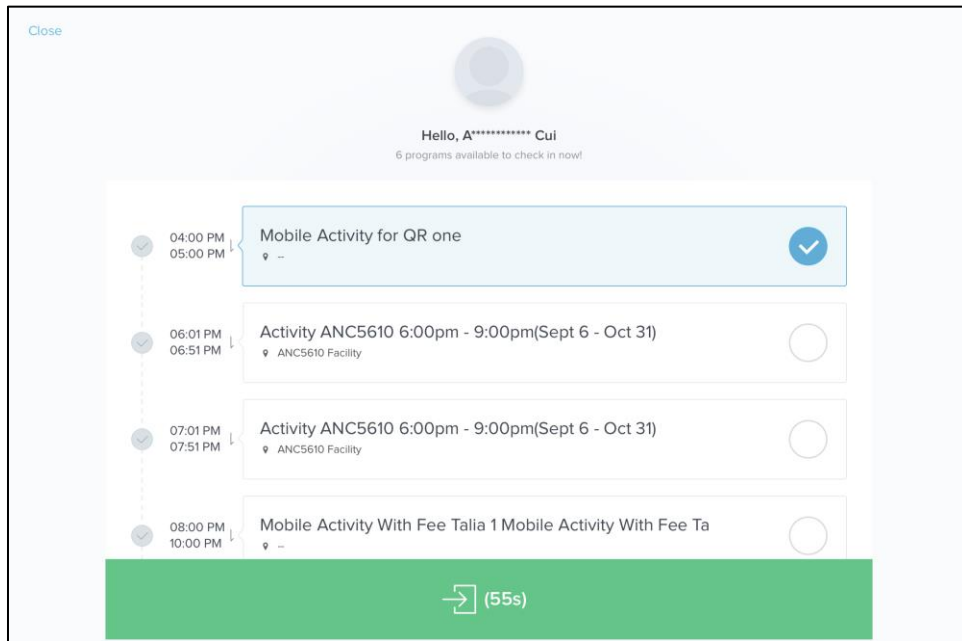
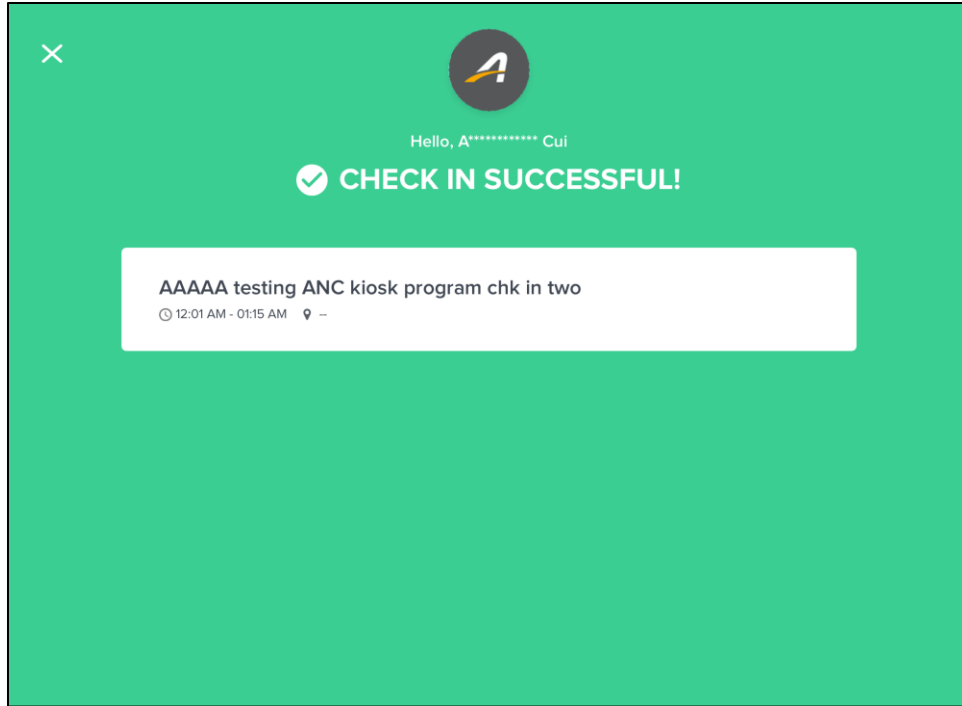# Kiosk mode: self-check-into programs/activities

Program and/or activity (excluding private lesson activity) participants (or parents) can self-check-in by tapping the **Check into programs/activities** button followed by the ⛶ icon and then presenting their QR code to the camera:
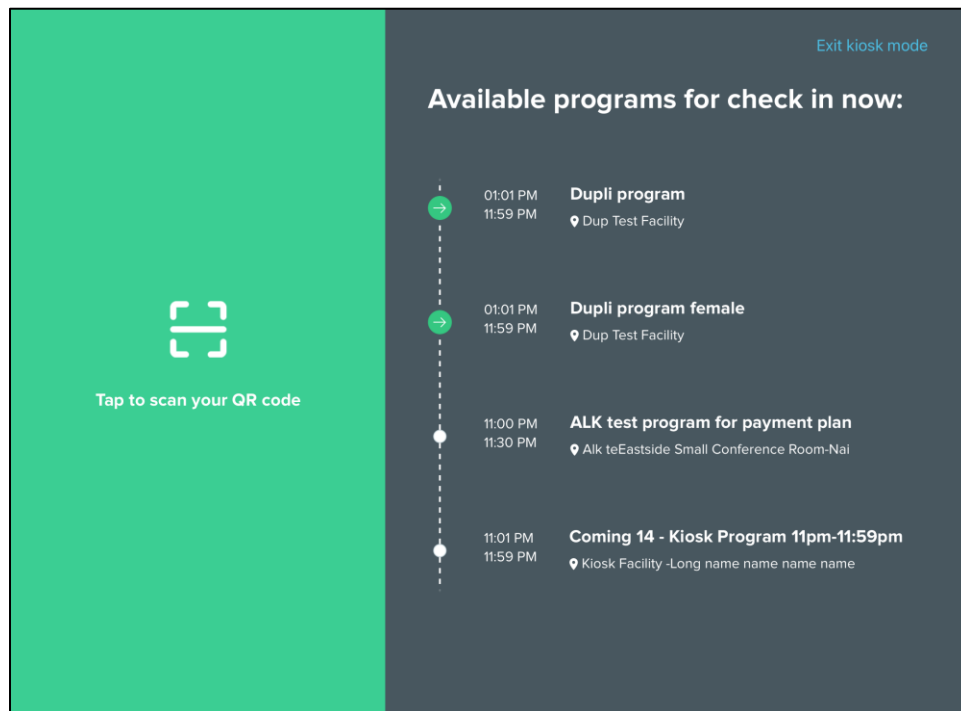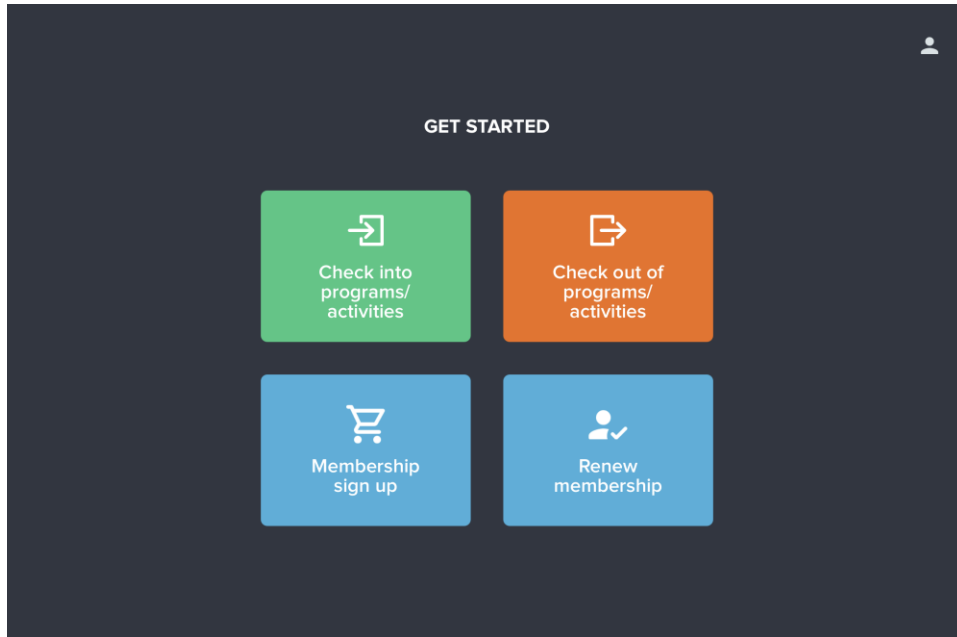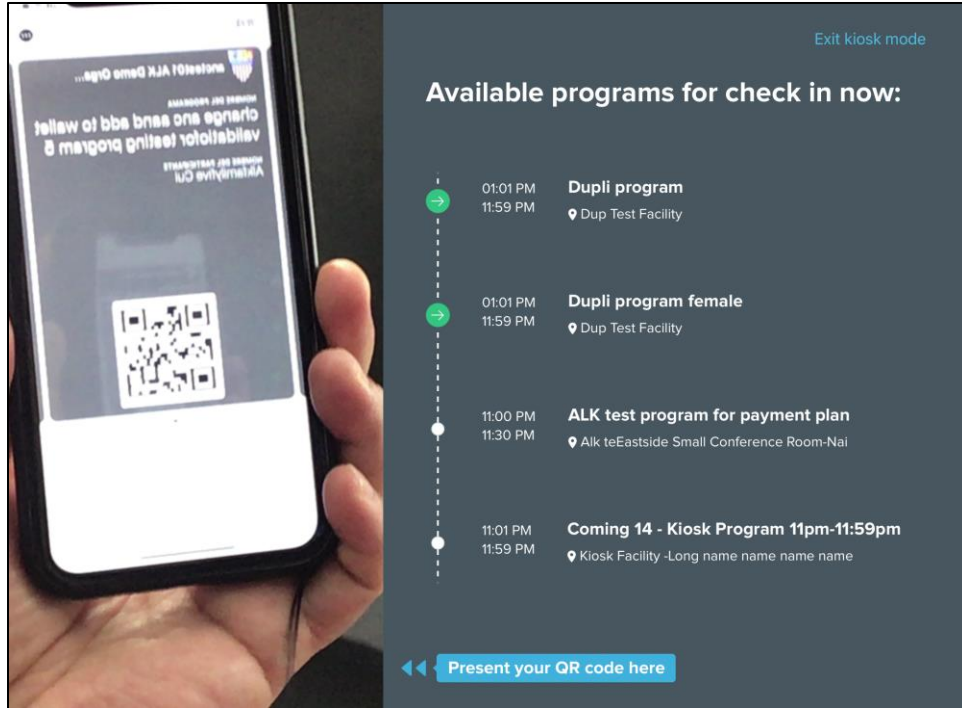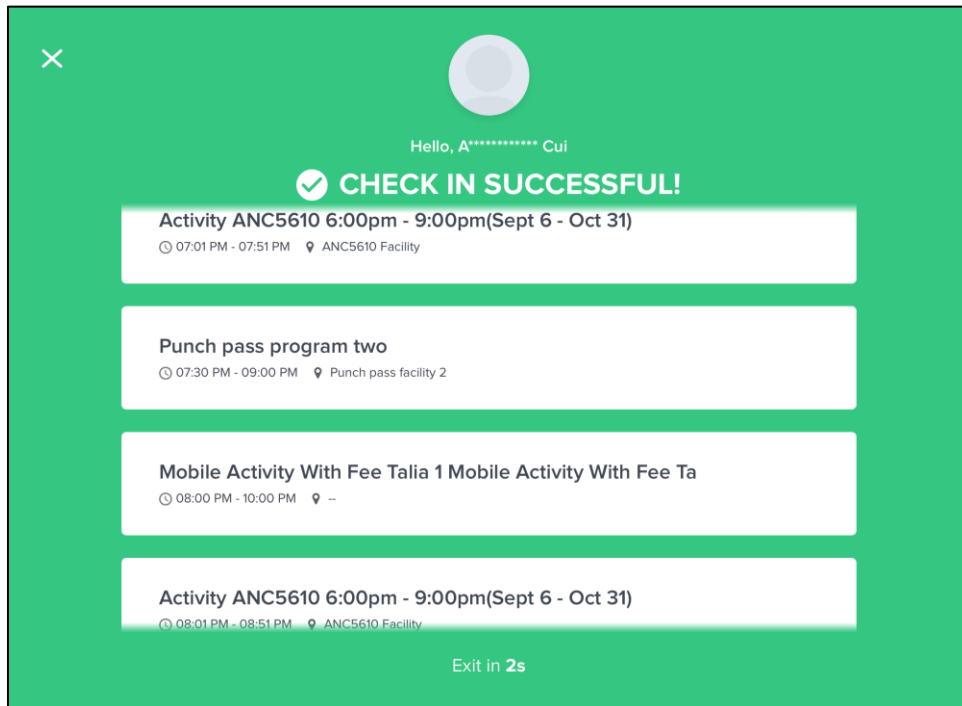
- In normal mode, participants have 60 seconds to select which programs and/or activities to check into and tap the ⤼ (check in) button:

- In fast mode, participants are automatically checked into all their programs and/or activities on the current date:

Kiosk mode: self-check-out of programs/activities

Program and/or activity (excluding private lesson activity) participants (or parents) can self-check-out by tapping the **Check out of programs/activities** button followed by the ⬚ button and then presenting their QR code to the camera:
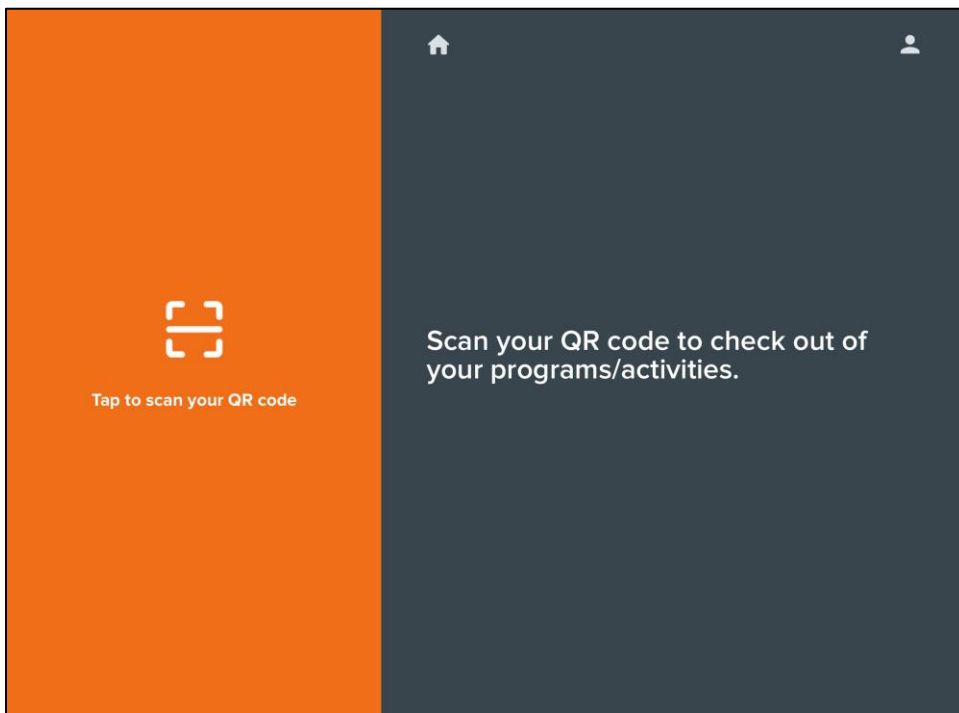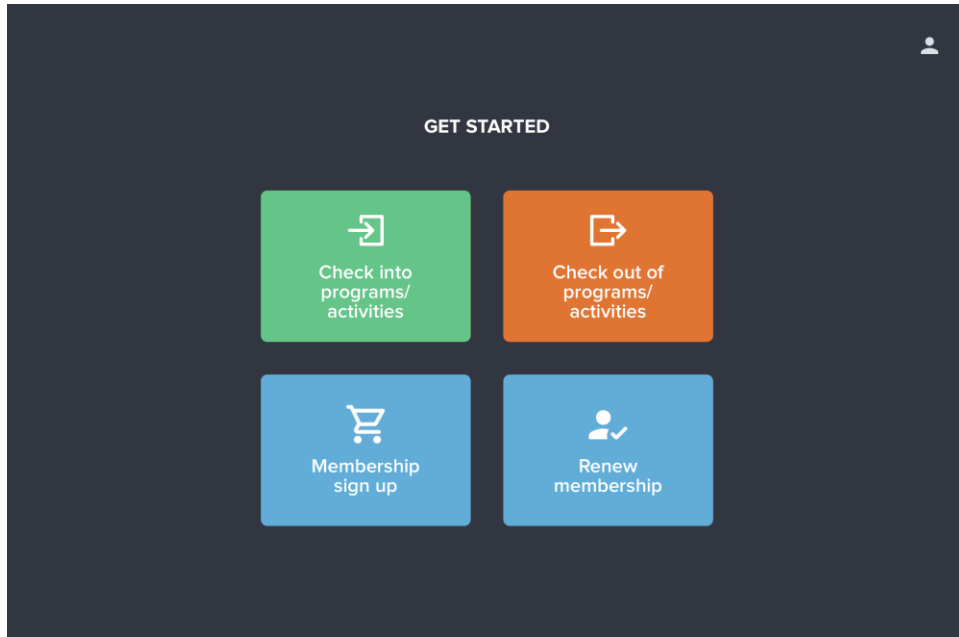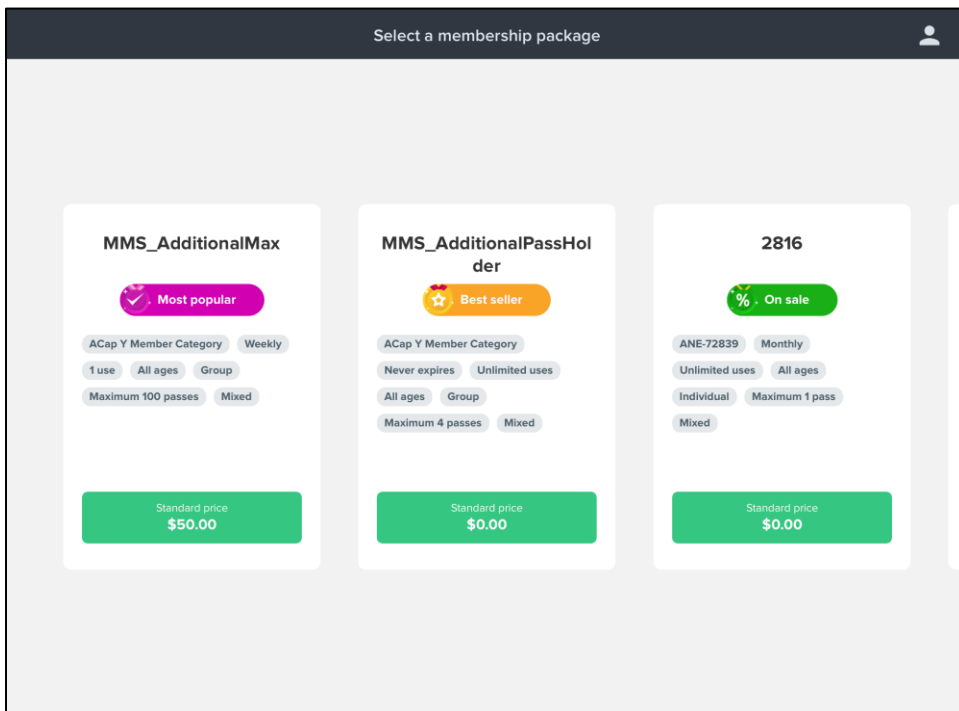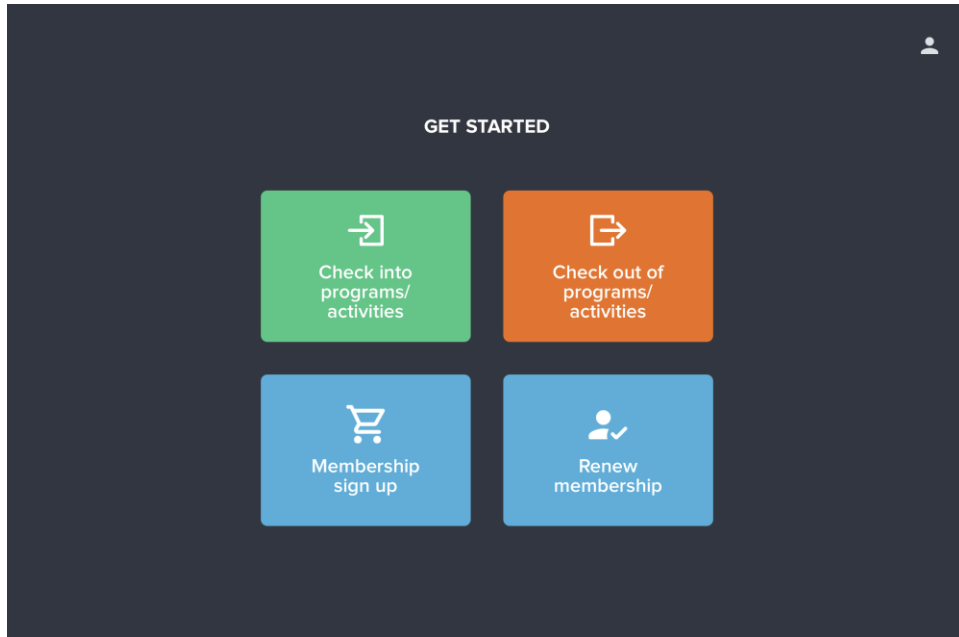
Participants can then select the programs/activities to check out of and then tap the ⍈ button:
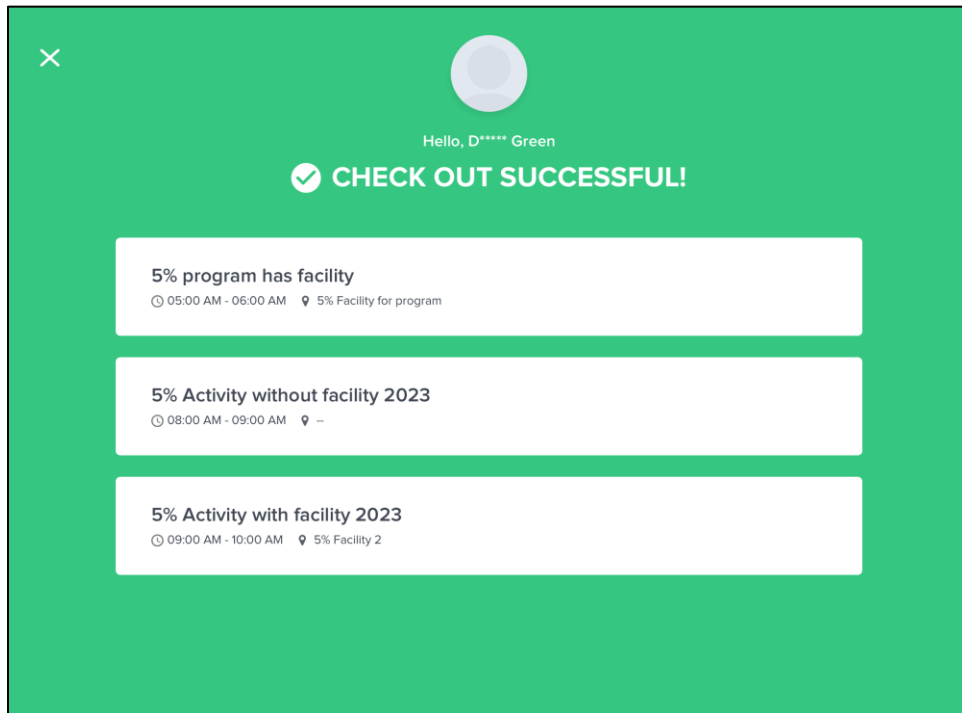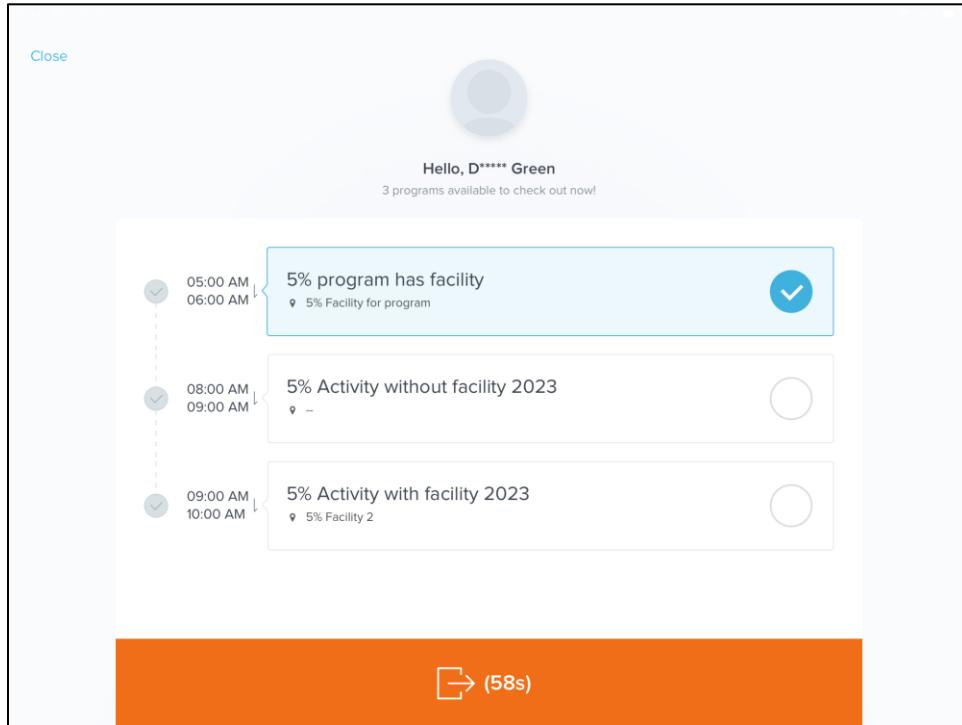
Kiosk mode: membership self-signup

Consumers can self-signup to a membership package by:

1. Tapping the **Membership sign up** button:

2. Swiping left or right to browse available membership packages.

3. Selecting the required membership package by tapping it.
4. Signing into their ACTIVENet account by entering their **Username** / **Password** or **Create an account**.

- If this is the consumer's first sign-in to their account, then the consumer will be requested to read and accept/sign any obligatory waivers.
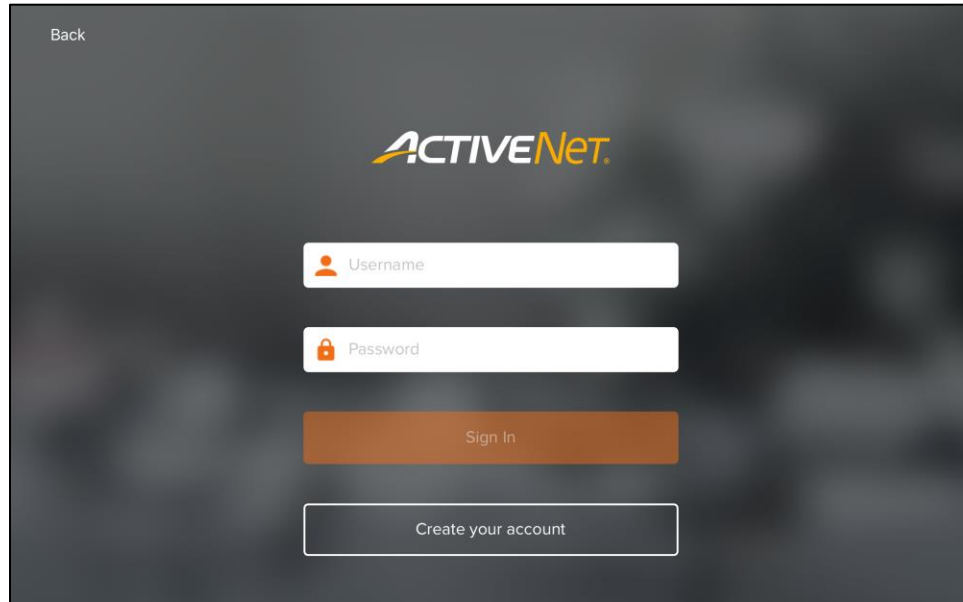
- If the consumer already owns the selected membership package, then he/she can select to:
  - Buy this membership for another family member (**Buy for Family Member** button).
  - Renew this membership (**Renew membership** button) which opens step 3 of the [Kiosk mode: membership self-renewal](#) workflow.
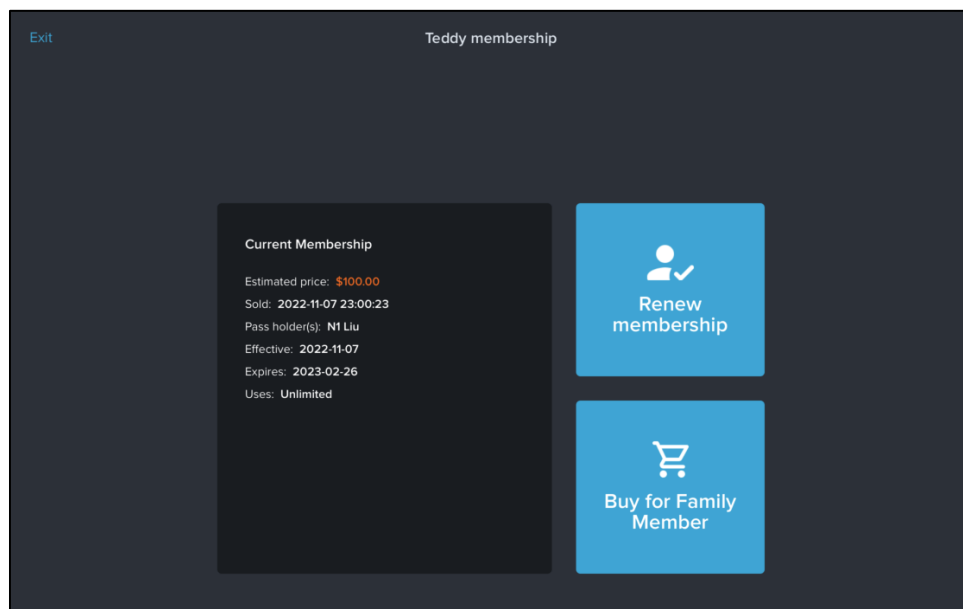
3. Select the required number of **Enrollment periods**, **Primary pass holder** and **Additional pass holder(s)** and answer any custom questions.
   - The specific questions displayed on this page depend on the configuration of the membership package).

4. Tap the **Next** link to read and accept/sign waivers.
   - The waivers displayed on this page depend on the configuration of the membership package.
   - Some waivers require to consumer to tap the waiver title link to view the waiver.

5. Tap the **Next** link to **Check Out** and select/enter the **Payment Method** and **Billing address**:

- To enter new credit card information, tap **Add a new credit card**:

6. Tap the **Pay** button to process the payment and complete the purchase.
   - For security, the consumer is automatically signed-out of their ACTIVENet account after leaving this order confirmation page.

![ACTIVENet logo]

Kiosk mode: membership self-renewal

Consumers can self-renew a membership package that they or a family member already own as follows:

1. Tap the **Renew membership** button and then sign into their ACTIVENet account by entering their **Username** and **Password**:

![ACTIVE network logo]
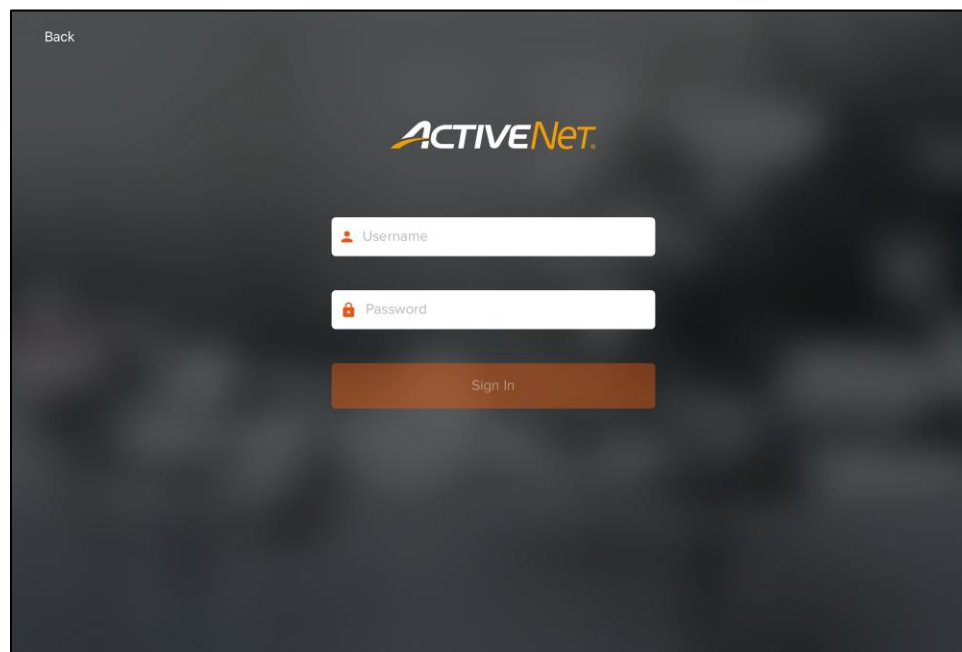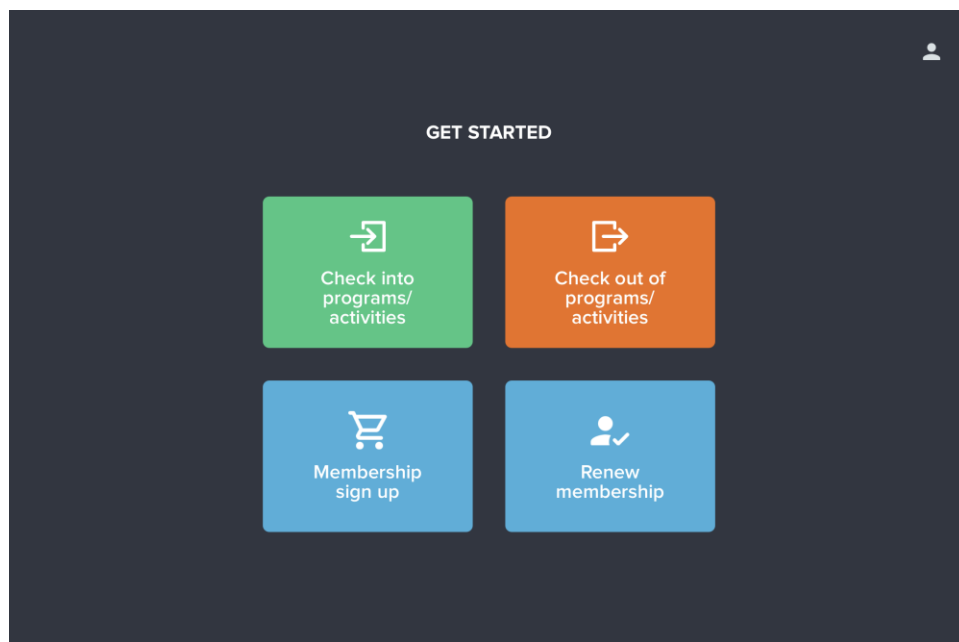
2. Select the membership package to renew by tapping the corresponding **Renew now** button
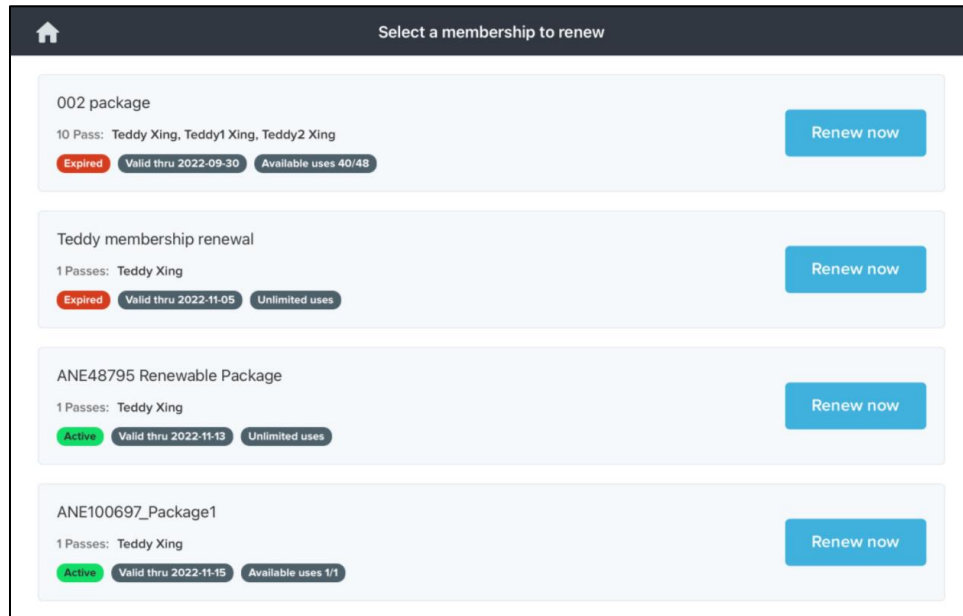
3. Select the required number of enrollment periods and **Primary pass holder** and answer any custom questions.
   - The specific questions displayed on this page depend on the configuration of the membership package.
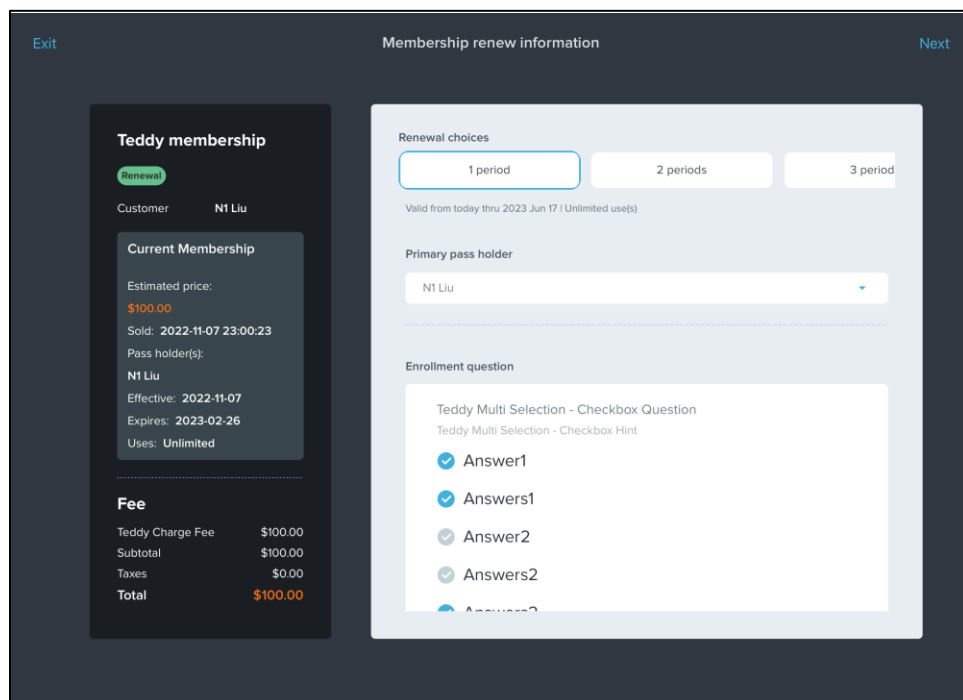
4. Tap the **Next** link to read and accept/sign waivers.

- The waivers displayed on this page depend on the configuration of the membership package.
- Some waivers require to consumer to tap the waiver title link to view the waiver.
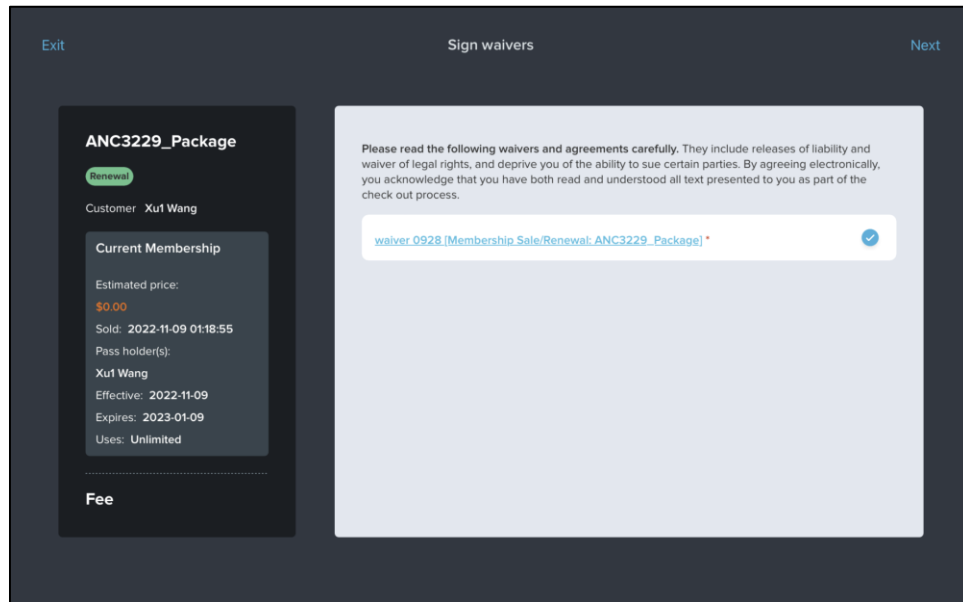

5. Tap the **Next** link to **Check Out** and select/enter the **Payment Method** and **Billing address**.
   - To enter new credit card information, tap **Add a new credit card**.
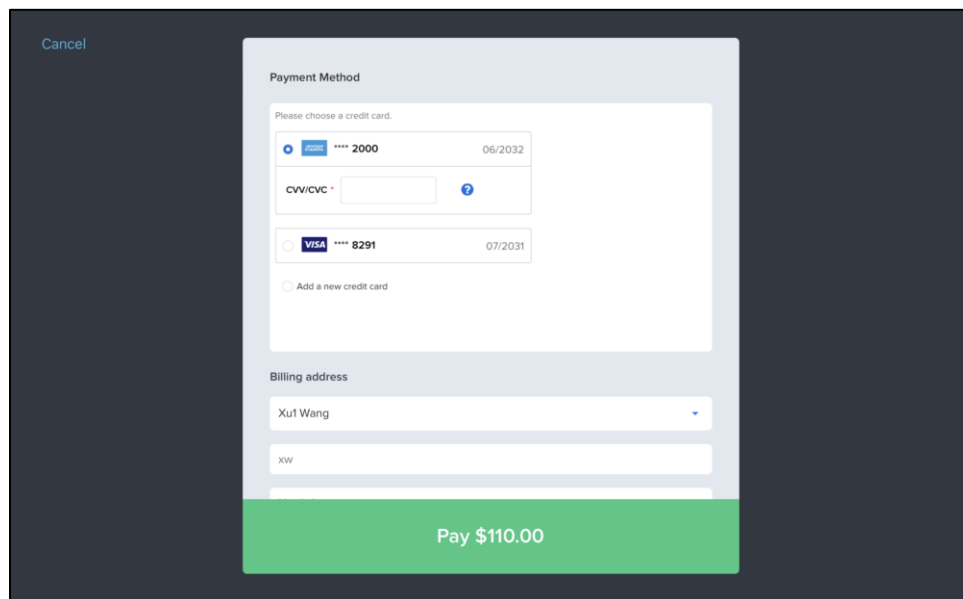
7. Tap the **Pay** button to process the payment and complete the renewal.
   - For security, the consumer is automatically signed-out of their ACTIVENet account after leaving this order confirmation page.

Exiting kiosk mode
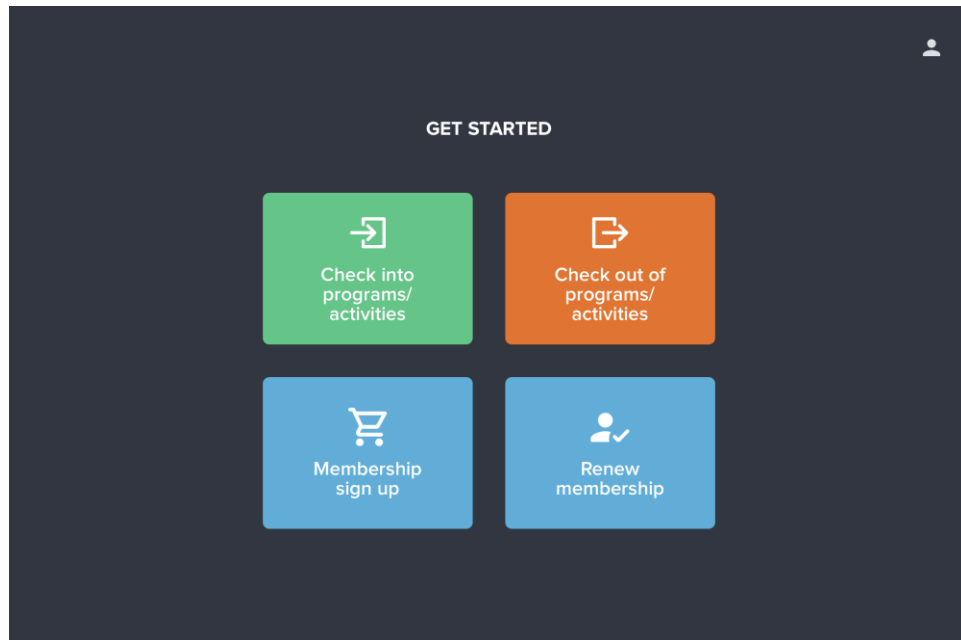
To exit kiosk mode:
1. Tap the 👤 icon and then tap **Yes**.
2. Sign into the app.
   - An unsuccessful sign in returns the app to kiosk mode.

Check In > Child Care/Flex Registration module

The Check In > Child Care/Flex Registration module contains the following tabs:

Programs tab

The Programs tab page displays all programs on the selected day.
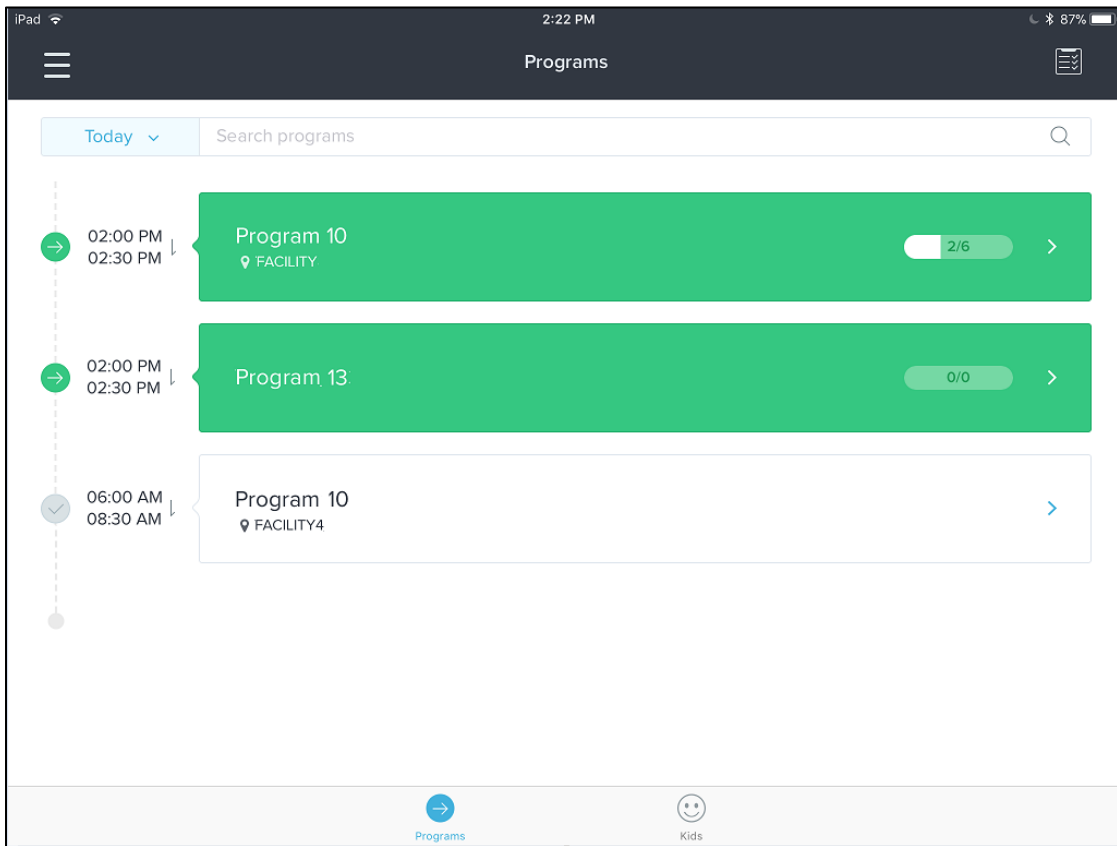
Selecting a required day

The **Programs** tab displays programs on a single selected day. Today is selected by default. To view programs on other days:

- Tap the ⌄ icon, and then select the required day.
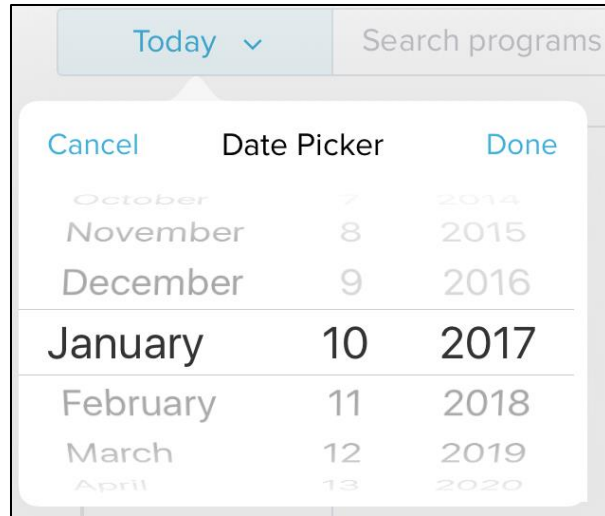
- In the program list area, swipe left to move to the previous day.
- In the program list area, swipe right to move to the next day.

Searching for a program

To search for a program, in the **Search Programs** field, enter the program name.

Viewing program details and rosters

To view program details and rosters, in the program list, tap the required program.

- Program details such as program type, location, session time and description are displayed.

- Below the program details section, the program roster is displayed.

  Users can view and filter kids by check-in status (total, not checked-in, checked-in, checked-out and absent). To search for a kid, enter the kid's name in the **Search kids** box.

  Tapping a kid's avatar directs you to the Kid Details page, where you can view and update the kid's details, or check in/out the kid. For more information, refer to <u>The Child Details page</u>.

Checking-in or checking-out a group of kids

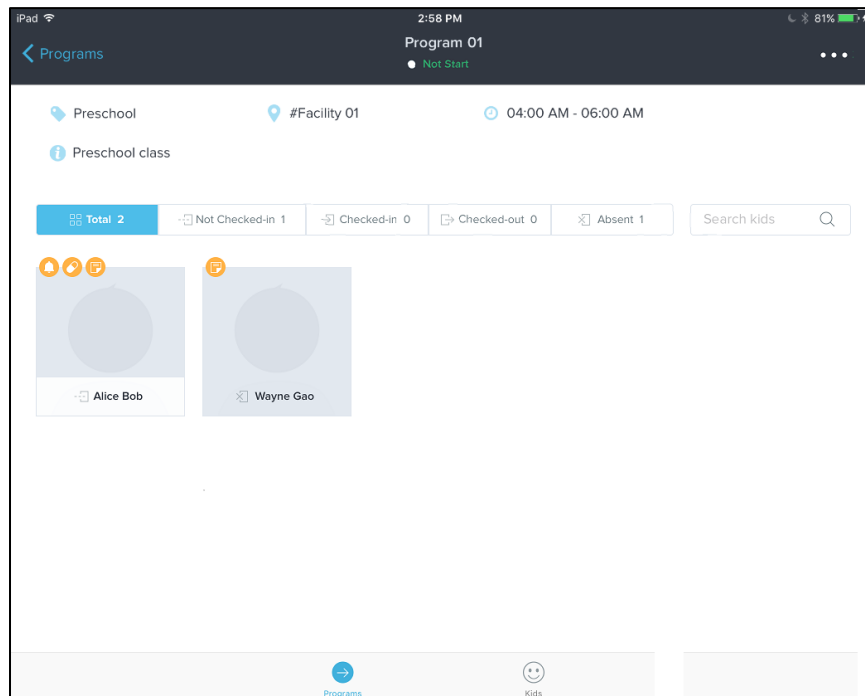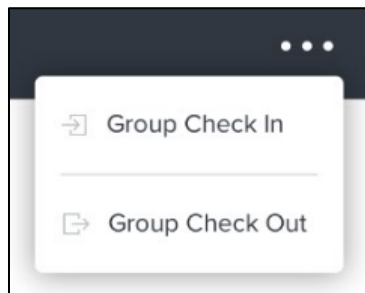You can use the Group Check In and Group Check Out features to batch check-in kids to a program or batch check-out kids from a program.

To check-in kids or check-out a group of kids:

1. Open the required program.

2. On the top right corner, tap the ⋯ button and then select **Group Check In** or **Group Check Out**.

3. Multi-select the required kids and then on the top-right corner, tap the **Check In** or **Check Out** button.

4. On the **Check In** or **Check Out** page, select a drop-off/pick-up person and enter other required options.

After checking-in/checking-out, to undo a check-in/checkout for a Child Care program, tap the **Undo** button next to the required check-in/check-out record.

Marking kids as absent

To better manage FlexReg program attendance, you can mark kids as absent from a FlexReg program on a past date, on the day of the program or in advance and easily distinguish between kids who were absent, have not yet arrived and who will not be attending on that day.

For kids who were absent or have not been checked-in:

- to mark a kid as absent, under the **Programs** or **Kids** tab, select the required date and program, then on the required kid's **CHECK In** page, tap the **Absent** button and select a reason for the absence.
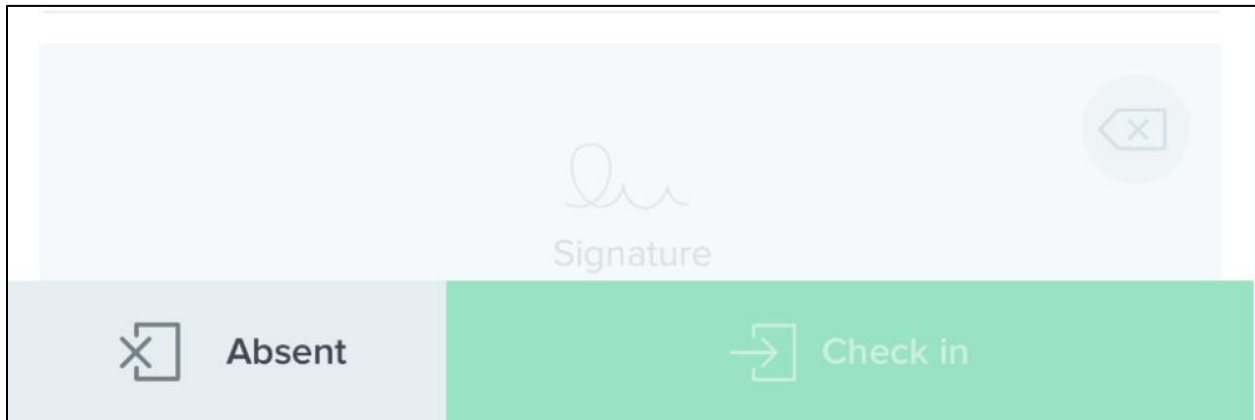
- to mark a batch of kids as absent:

  ◆ under the **Programs** tab, select the required date, then on the required FlexReg program session page, tap the ⋯ menu and tap **Group Absent**.

  In the **Select Kids to mark as absent** section, select the avatars for the absent kids, tap **Absent** in the top-right corner and then select an absent reason.

  Once the kids are marked as absent, the lower section of their avatars are greyed-out.

Viewing attendance log

To open the **Attendance Log** page:
- On the **Programs** tab, tap the ≣ icon.
- On the **Programs** tab > a specific program, tap the ≣ icon:

- If required, change the program or select additional programs by tapping the **Programs** dropdown and then searching for and selecting the required programs:
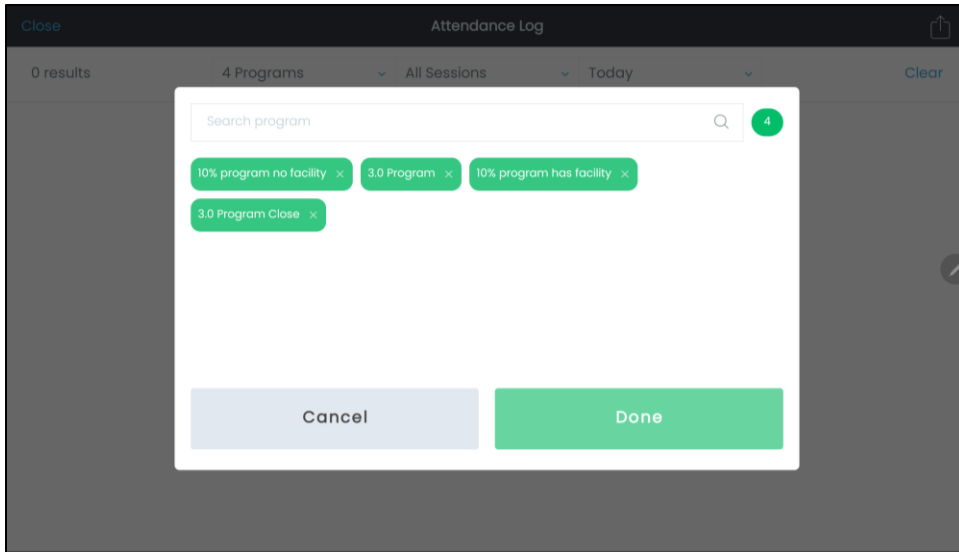
- If required, change the session or select additional sessions by tapping the **Sessions** dropdown and then searching for and selecting the required sessions:
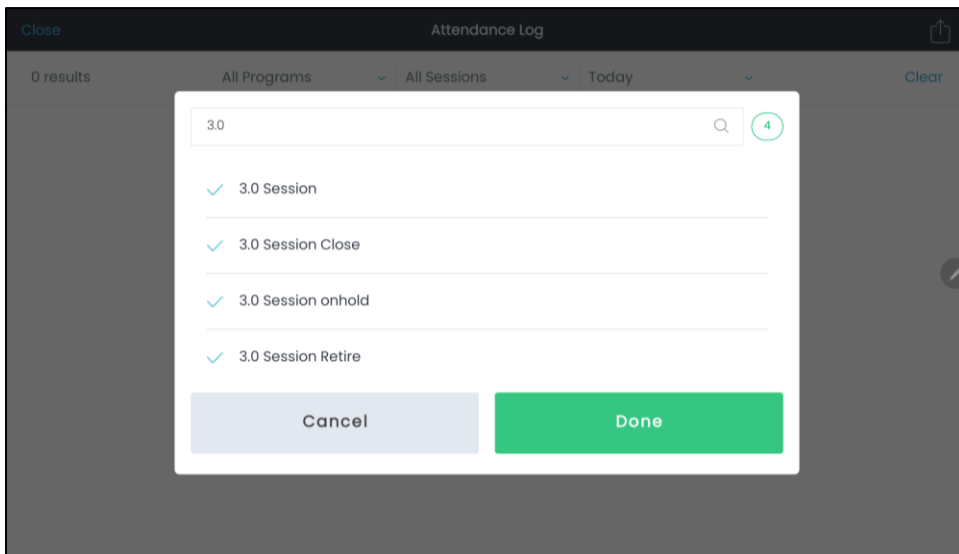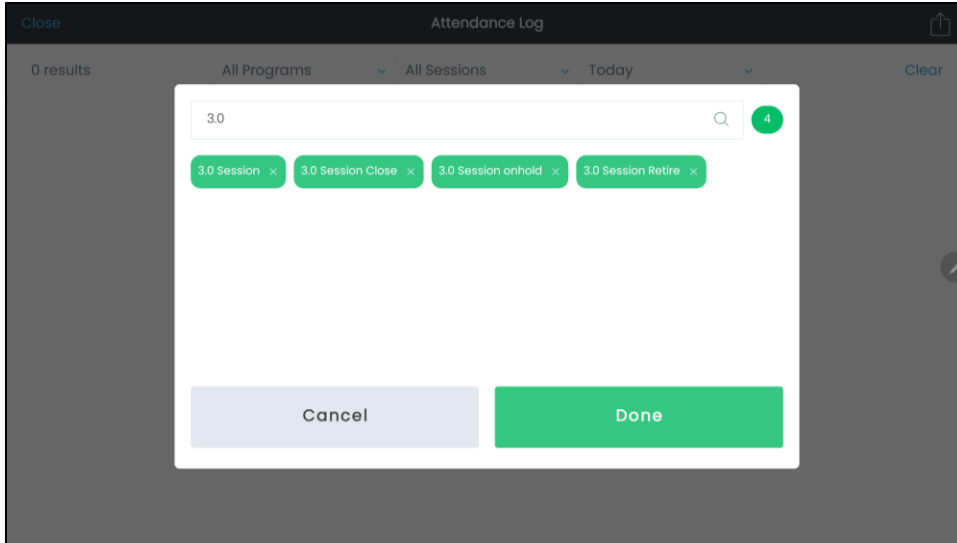
- If required, change the date range by tapping the **Today** dropdown and then selecting the required date range.
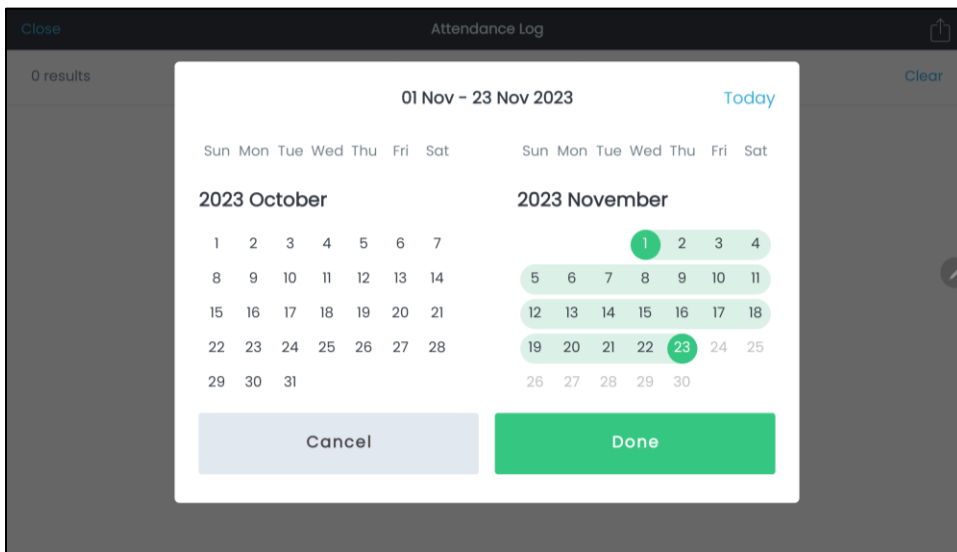
- To view a participant's profile, tap the participant's name:
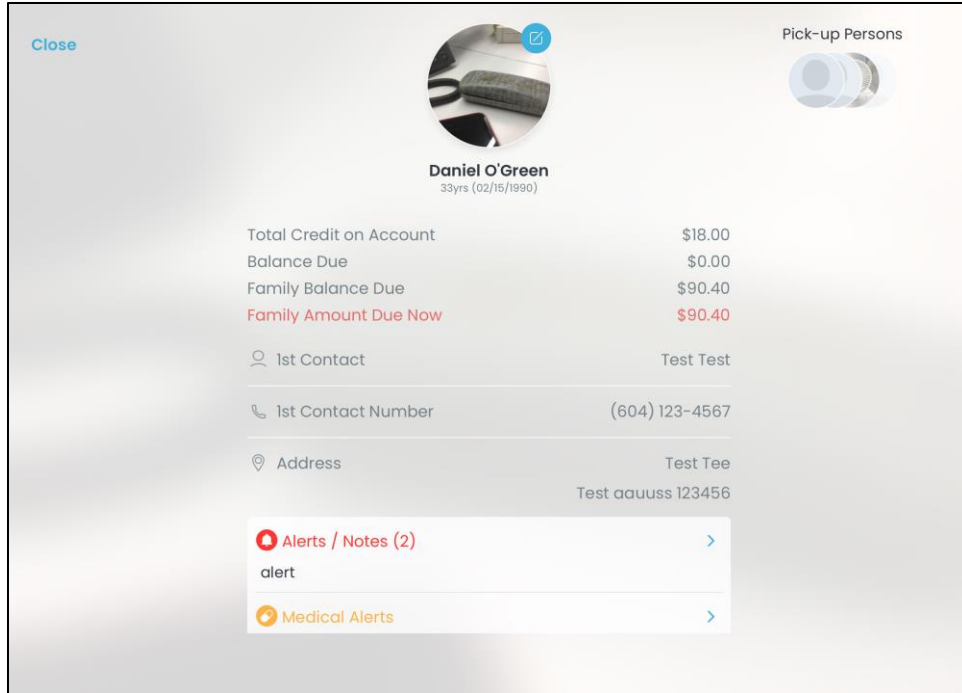
- To export the attendance log by email, tap the ⬆️ icon and then:
    1. Enter recipient e-mail addresses (separated by ;) to which to send the exported activity attendance log.
    2. Select the **Attachment Format** > **CSV** or **PDF**.
    3. Tap the **Done** button.
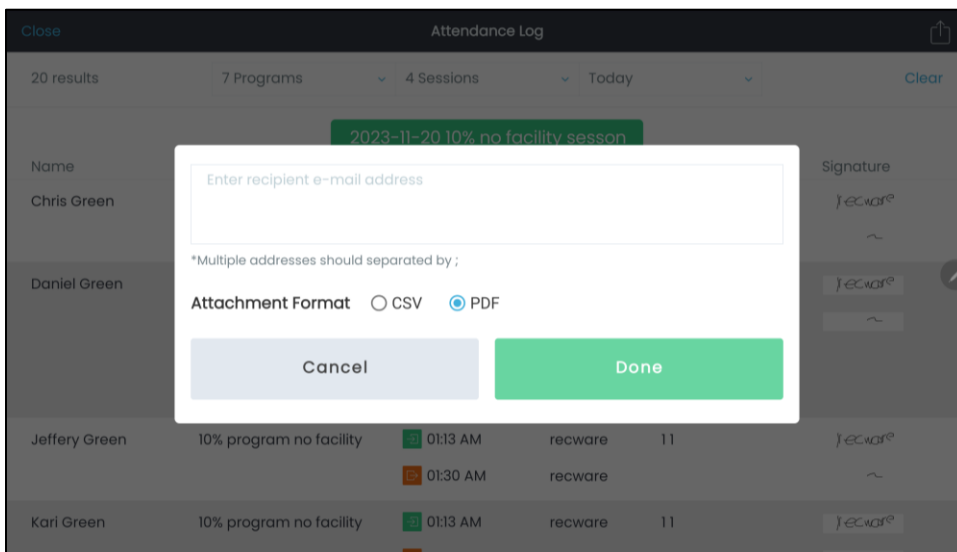
Kids tab

The **Kids** tab page displays all kids who have enrolled in Flex Registration programs on the selected day.

Selecting a required day

The **Kids** tab displays kids who are enrolled into programs on the selected day. Today is selected by default. To view other days:

- Tap the ⌄ icon, and then select the required day.

Today ⌄	Search kids
Cancel	Date Picker	Done

October   7   2014
November   8   2015
December   9   2016
January   10   2017
February   11   2018
March   12   2019
April   13   2020
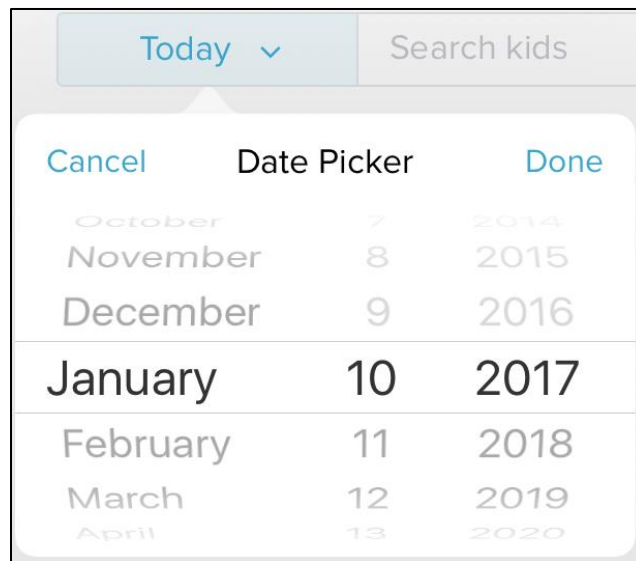
- In the kid list area, swipe left to move to the previous day.
- In the kid list area, swipe right to move to the next day.

Searching for kids

The **Kids** tab alphabetically lists all kids by last name.

To search for a kid, either enter the child's name in the search box or tap the initial letter of the child's last name. If you select a kid, you are directed to the **Kid Details** page. For more information, refer to [The Child Details page](#).

Viewing attendance log for the selected kid

To open the **Attendance Log** page:

1. On the **Programs** tab > specific kid page, on the top right corner, tap the 🗒 icon.

2. On the **Attendance Log** page, filter and view attendance records as required.

Click the [icon] icon to email a PDF-formatted attendance log.

Checking-in or checking-out a group of kids

On the top-right corner of the **Child Care** module > **Kids** tab, tap the ⋯ button.

- To check-in a group of kids, select **Group Check In**. Select the required kids and then tap **Check-in** on the top-right corner.

- To check-out a group of kids, select **Group Check Out**. Select the required kids and then tap **Check-out** on the top-right corner.

After checking-in/checking-out, to undo a check-in/checkout for a Child Care program, tap the **Undo** button next to the required check-in/check-out record.

Childwatch tab (iOS only)

Organizations that offer a drop-in Childwatch service can use the **Childwatch** tab to manage their childwatch service. Kids may attend Childwatch whilst waiting for their parents to use facilities or participate in activities.

Childwatch facilities for many organizations have multiple rooms for different purposes, for example, for different age groups. To configure Childwatch rooms, go to the **ACTIVENet AUI > Administration Home > System Settings > Configuration - General** page **> ACTIVE Connect Setting** section. Childwatch rooms are optional for the check-in process. The Room filter displays each room's checked-in/checked-out occupant count and capacity. To view the list of checked-in/checked-out kids for a room, select the room from the Room filter.

The Childwatch module is exclusive to the ACTIVENet Connect app and is not an ACTIVENet AUI module.

Note: The **Childwatch** tab is displayed only if the **Setting** page **> Child Watch** radio button is selected. For more information about Childwatch settings, refer to The Others > The Settings page.

For better access control, you can configure ACTIVENet Connect to apply the entry point's validation rules to Child Watch. For more information, refer to Applying entry point's validation rules to Child Watch.
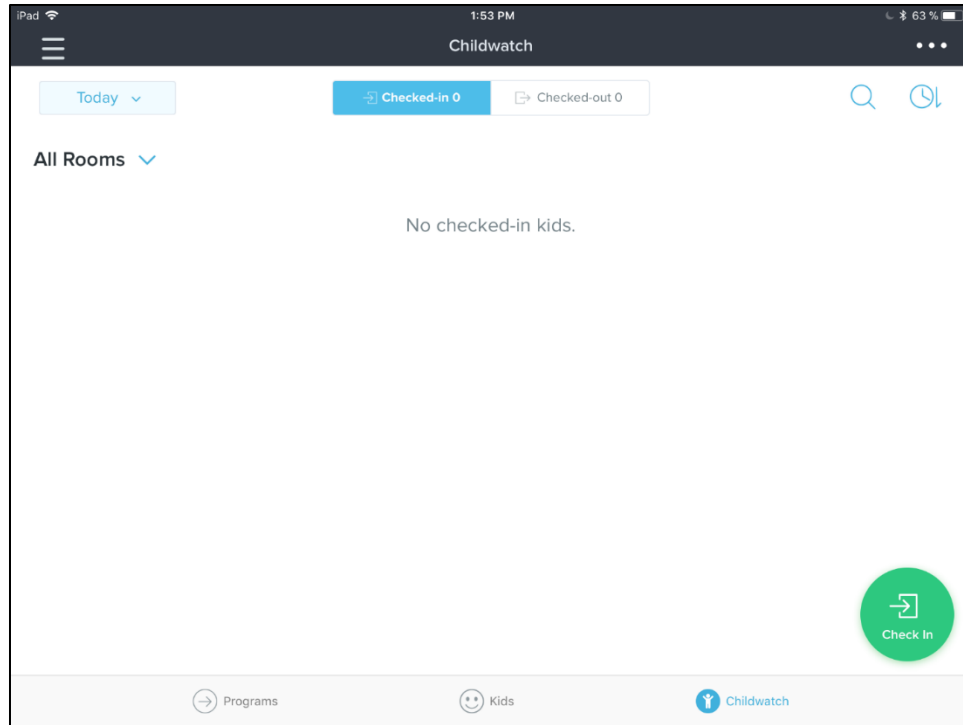
The **Childwatch** tab has the following sub-tabs:

- **Checked-In** sub-tab: displays checked-in kids on the selected day
- **Checked-Out** sub-tab: displays checked-out kids on the selected day

Selecting a required day

The **Childwatch** tab displays the kids in childwatch on the selected day. Today is selected by default.

- To view kids on other days, tap the ⌄ icon, and then select the required day.

- In the kid list area, swipe left to move to the previous day.

- In the kid list area, swipe right to move to the next day.

Searching for kids

The **Childwatch** tab lists all kids by check-in time/check-out time by default. On the top-right corner, you can click the sorting icon to switch to the required sorting order:

- The ⏱ icon denotes sorting by check-in time/check-out time (default icon)
- The A↓ icon denotes sorting by last name
- The 👥↓ icon denotes sorting by return time

To search for a kid:

- On the top-right corner, tap the 🔍 icon and enter the kid's name in the search box.

- Tap the initial letter of the kid's last name.

You can also open the Room filter, and select the required kid from the room.

To edit a kid's information, refer to [Viewing and updating a kid's information](#).

Checking kids in to and out of Childwatch

To check a kid in to Childwatch:

1. Under the **Childwatch** tab, tap the 🟢 button.

2. Search for and select the required kid.

   To search for a kid by scanning the parent's barcode, tap the 📷 icon and use your camera to scan the barcode of the pass number. All family members are displayed for selection.
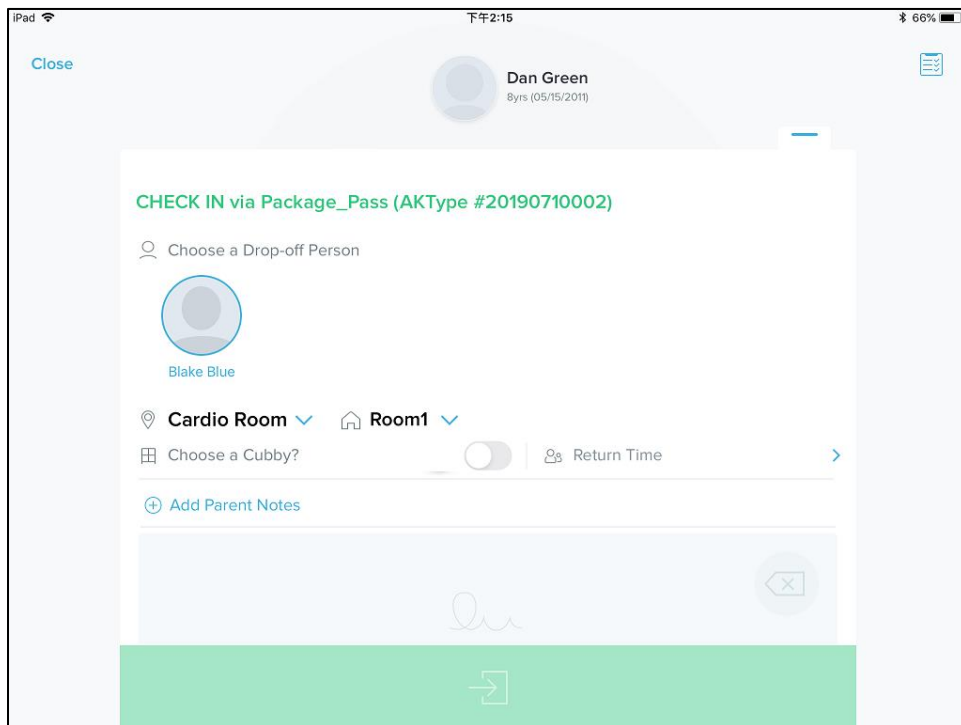
3. If required, select a Childwatch room.

4. If required, select a drop-off person.

5. If required, choose a parent location.

6. If required, select the **Choose a Cubby** checkbox. For example, if the kid requires a locker.

7. If required, tap **Return Time** and specify a parent's return time for picking up their kid.

8. If required, tap **Add Parent Notes** and enter the required notes.

9. In the **Parent's Signature** box, have the parent sign their signature.

    Tap the button to complete the check-in.

To check a kid out of Childwatch:

1. Under the **Childwatch** tab, tap the **Checked-In** sub-tab.

2. Search for and select the required kid.

3. Select the required pick-up person.

4. If required, tap **Add Parent Notes** and enter the required notes.

5. In the **Parent's Signature** box, have the parent sign their signature.

6. Tap the button to complete the check-out.

To view checked-out kids:

1. Under the **Childwatch** tab, tap the **Checked-Out** sub-tab.

2. Search for and select the required kid.

After check-in/checkout, to undo a check-in/checkout for Childwatch, tap the **Undo** button next to the required check-in/check-out record.

Checking a group of kids in to and out of Childwatch

To check-in a group of kids into Childwatch:

1. Under the **Child Care** module > **Childwatch** tab, tap the green **Check In** button.

2. Tap the menu button on the top-right corner.

3. Select **Group Check In**.

4. Search for and select the required kids.

5. Tap the **Check In** button on the top-right corner.

6. Select a drop-off person and enter the required options.

To check-out a group of kids from Childwatch:

1. Under the **Child Care** module > **Childwatch** tab, tap the menu button on the top-right corner.

2. Select **Group Check Out**.

3. Select the required kids

4. Tap **Check Out**.

5. Select a pick-up person and enter the required options.

Viewing attendance log

To open the **Attendance Log** page on the top-right corner of the **Childwatch** tab, tap the ⋯ icon > **Attendance Log**.

On the **Attendance Log** page, filter and view attendance records as required:

To view a participant's profile, tap the participant's name.

Click the ![share icon] icon to email a PDF-formatted attendance log.

Viewing all checked-in kids' 1st Contact information

On the **Childwatch** tab, to view 1st Contact information for all kids that checked into the selected rooms on the selected date, tap ⋯ > **Contact Info**:
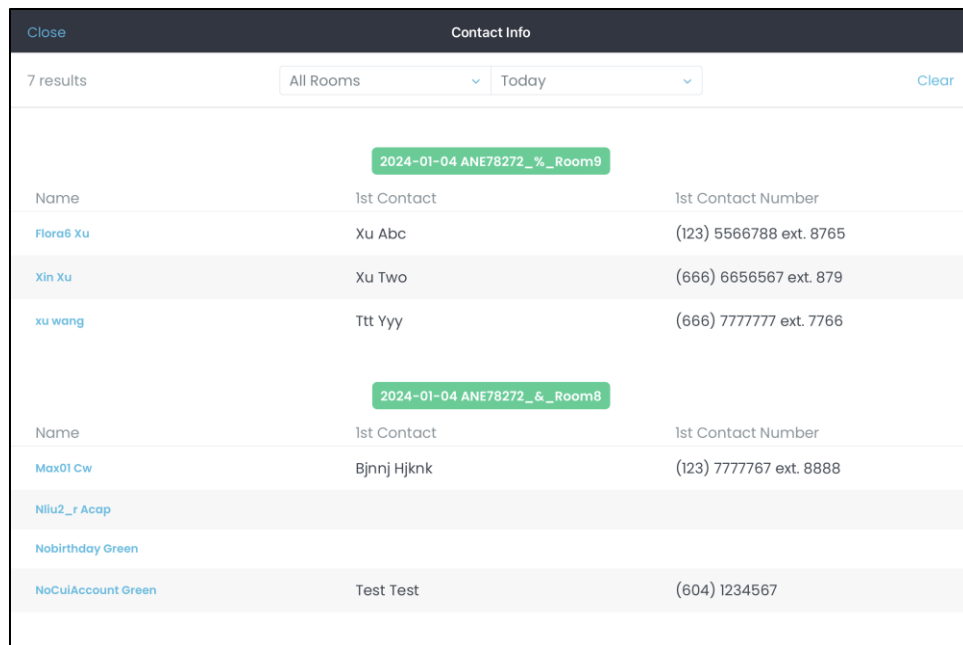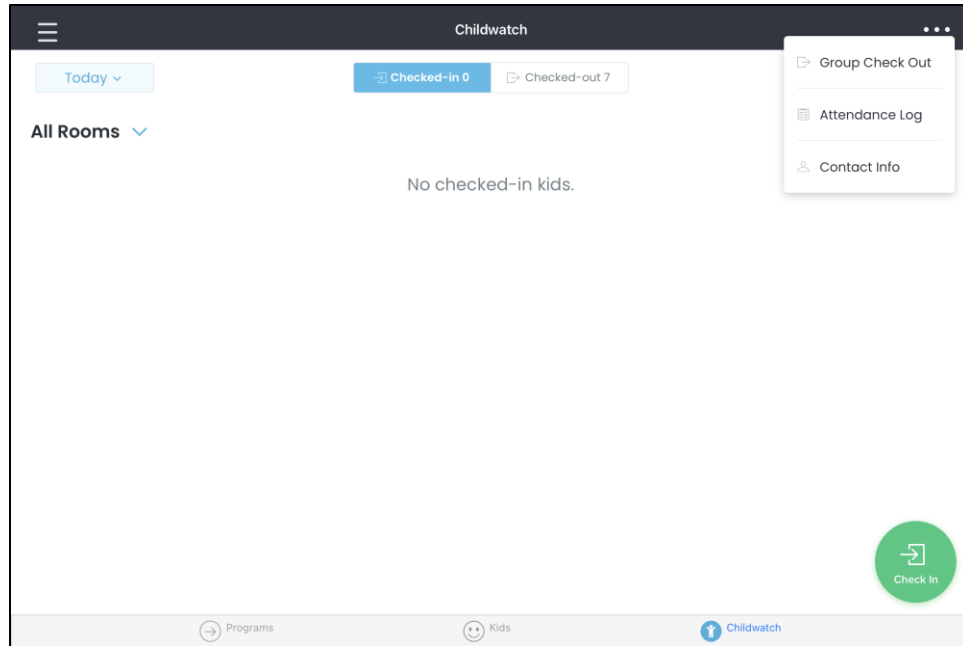
Applying entry point's validation rules to Child Watch

To configure ACTIVENet Connect to apply the entry point's validation rules to Child Watch, select the **ACTIVENet AUI** > **Administration Home** > **System Settings** > **Configuration - General** > **Active Net Connect Setting** section > **Apply entry point's validation rules to Child Watch** check box.

When this check box is selected, after searching for and selecting a child account, staff users must then select a membership or alternate key for the entry point to check the child in to Child Watch (for children with a

single membership or a default membership for the specified entry point, the membership is automatically selected).

Children without memberships or alternate keys for the entry point will be denied entry.

When checking-in a child with multiple family members into Child Watch, other family members are also displayed for selection. Staff users can select additional family members to check-in with the child.

Child Details page

Checking a kid in to or out of a Childcare program

To check in/out a kid:

1. If there are multiple Child Care/FlexReg programs, tap the ∨ icon to select the required program.

2. To view the check in/out history, swipe to the bottom, if applicable.

3. To check-in a kid, select the drop-off person, if required.

4. To check out a kid, select the pickup person, if required.

5. If required, tap **Add Parent Notes** and enter the required notes.

6. In the **Parent's Signature** box, have the parent sign their signature.

7. Tap the button to check in a kid.

   Tap the button to check out a kid.

On the check-in/out page, swipe to the bottom of the page to view the check in/out history and edit related information, including room, parent location and return time.

Note that you can check-in a kid multiple times on the same day to the same FlexReg program/session, so that parents can check-out their kids in the middle of the program/session, and then return their kids to the program/session later.

Viewing and updating a kid's information

To view basic kid details, on the top-right corner of the **Kid Details** page, swipe down on the icon.

- To edit a kid's details, tap the icon on the kid's avatar. On the **Edit Profile** page, update the avatar by using the iPad camera and update contact information, if required.
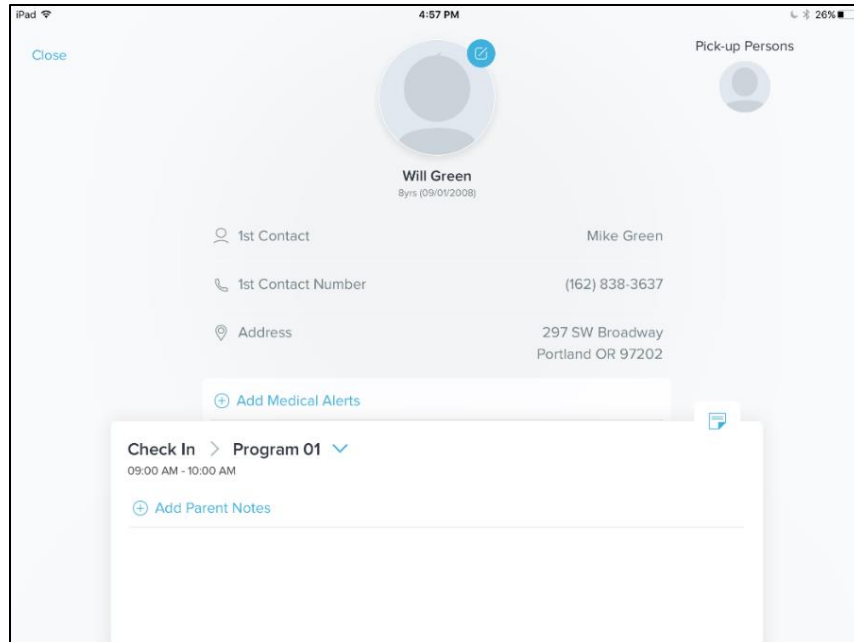
- To view alerts and notes created in the ACTIVENet AUI, tap the **Alerts** area.

- To add or edit medical alerts, on the kid's profile page, tap the **Medical Alerts** area.

- To prevent parents from seeing staff notes, the staff notes are hidden. To view staff notes, in the participant's profile section, swipe up to view the bottom of section.

  To add or edit staff notes, tap the **Staff Notes** area and enter the required content.

- To add a pick-up person or edit details of a pickup-person, on the top-right corner of the **Kid Profile** page:

  o tap the + icon for kids without any pick-up persons

  o tap the **Pick-up Persons** icon for kids with existing pick-up persons.
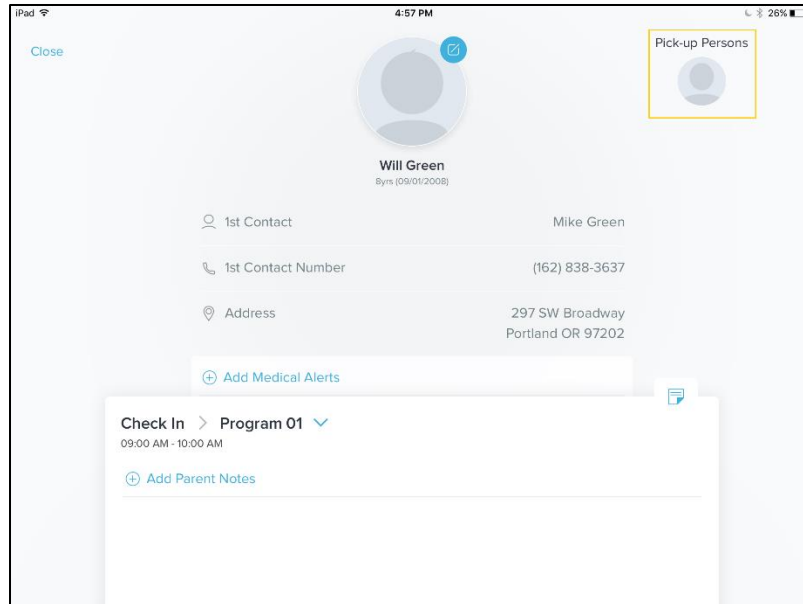
On the **Pick-up Persons** page, tap the + button to add a pick-up person or tap the edit icon of the required pick-up person's avatar to edit details of the pick-up person.

Check In > Activity module

The Check In > Activity module contains the following tabs:

Activities tab

The **Activities** tab page displays all activities on the selected day.

Selecting a required day

The **Activities** tab displays activities on a single selected day. Today is selected by default.

- To view activities on other days, tap the ⌄ icon, and then select the required day.

- In the activity list area, swipe left to move to the previous day.

- In the activity list area, swipe right to move to the next day.

Searching for an activity

To search for an activity, in the **Search Activities** field, enter the activity name.

Viewing activity details and rosters

To view activity details and rosters, in the activity list, tap the required activity.
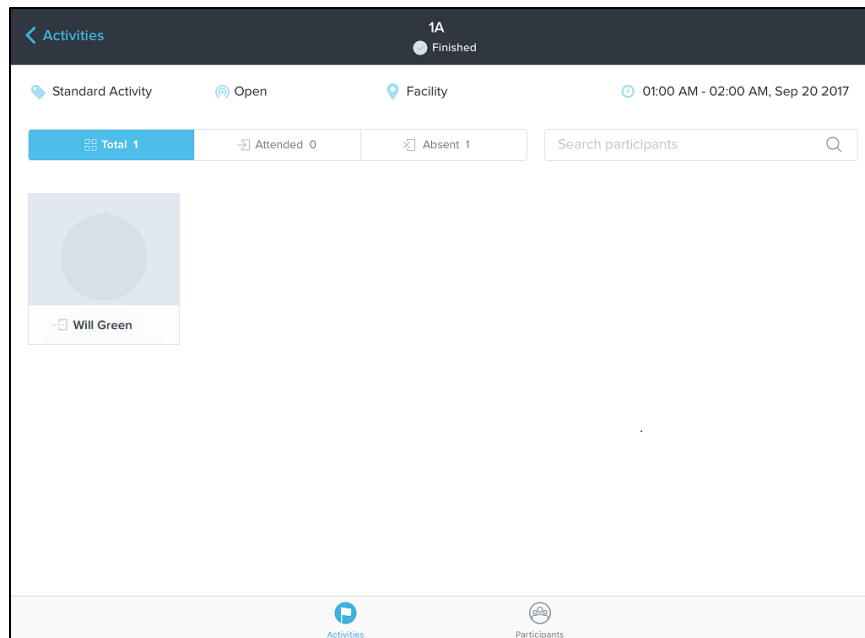
- Activity details such as activity type, status, location, and time are displayed.

- Below the activity details section, the activity roster is displayed.

  Users can view and filter participants by check-in status (total, attended and absent). To search for a participant, enter the participant's name in the **Search Participants** box.

  Tapping a participant 's avatar directs you to the Participant Details page, where you can view and update the participant's details, or check in the participant. For more information, refer to [The Participant Details page](#).

Checking in an activity participant

To check in a participant:

1. Select the required date.

2. Search for and select the required activity.

3. Tap the required participant:
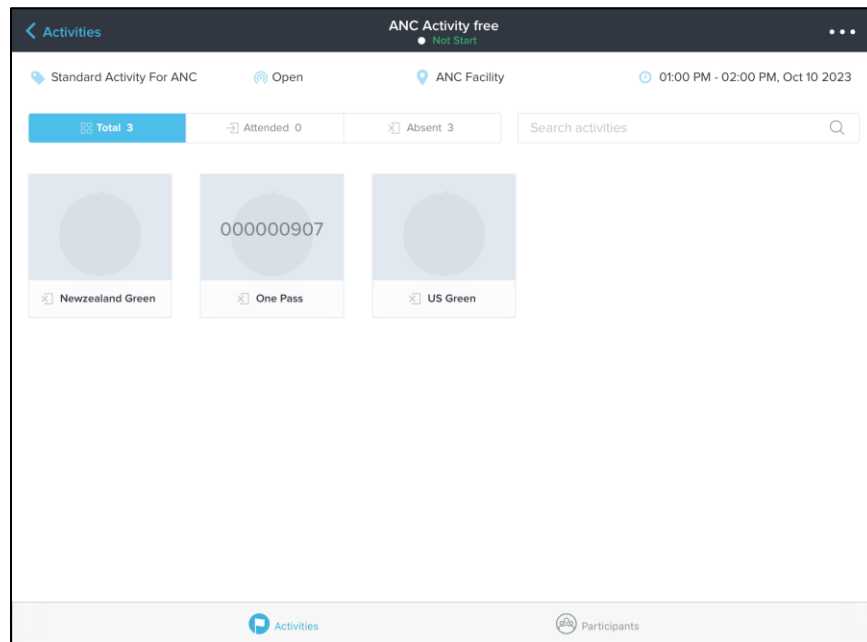
4. If the activity requires a signature on check-in, then collect the participant's **Signature**:
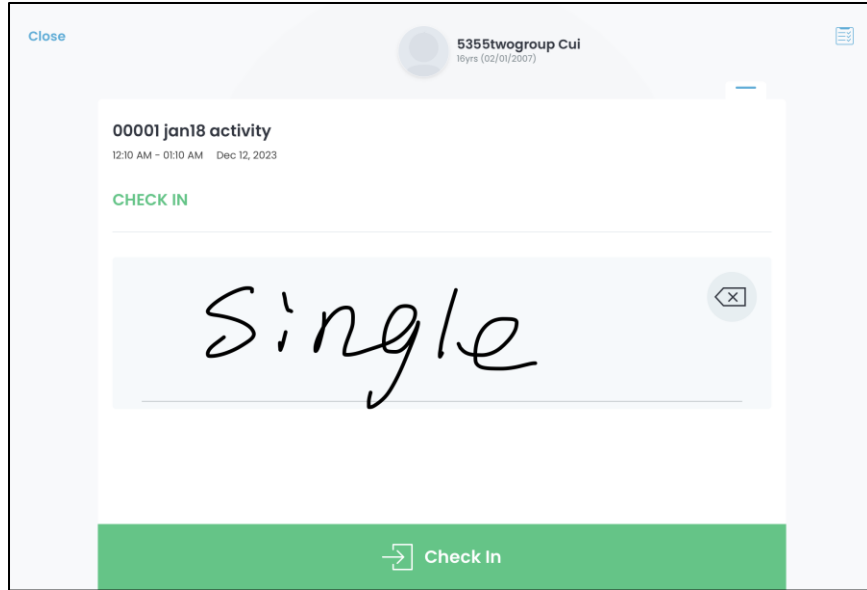
5. Tap the **Check In** button.

To undo a check-in, tap the checked-in participant and then tap the **Checked in** record > **Undo** button:
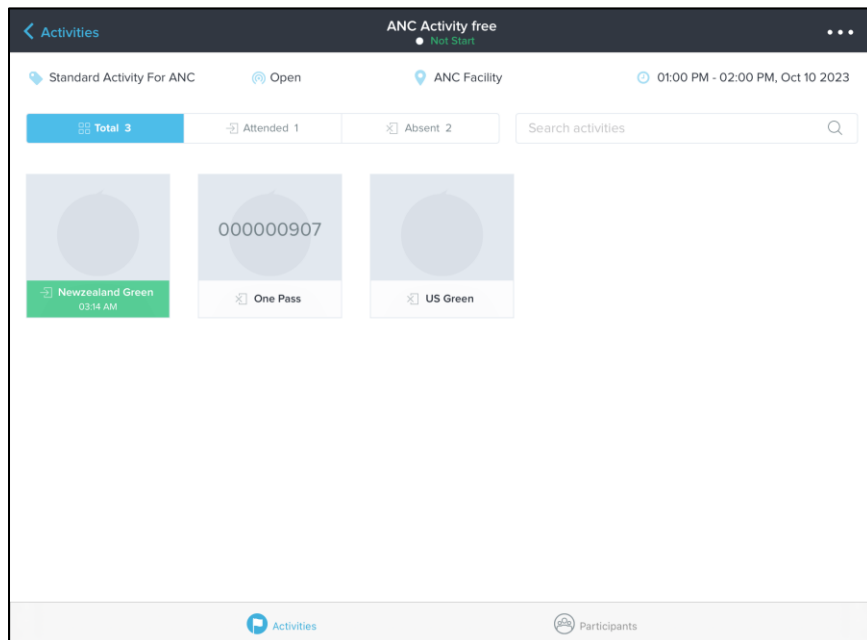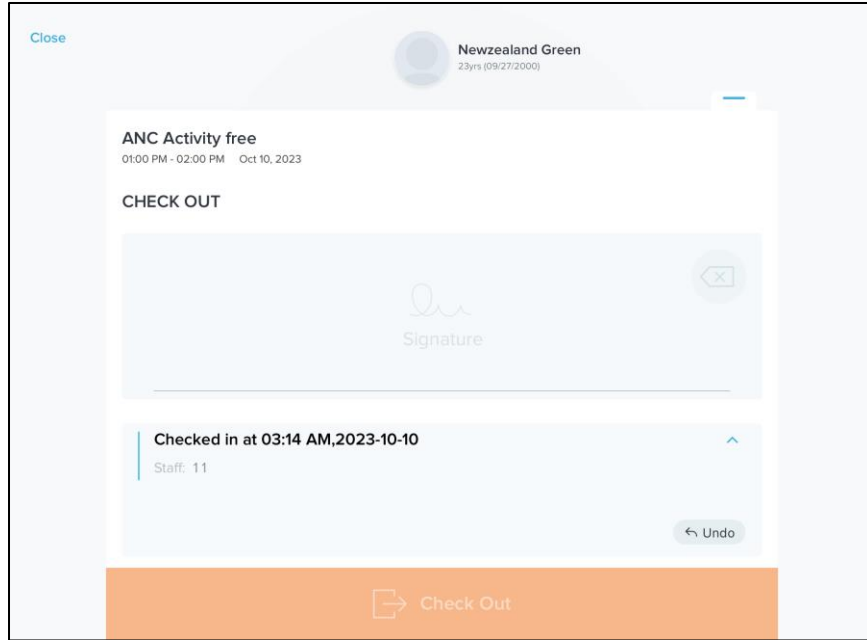
Checking out an activity participant

To check out a participant:

1. Select the required date.

2. Search for and select the required activity.

3. Tap the checked-in participant:
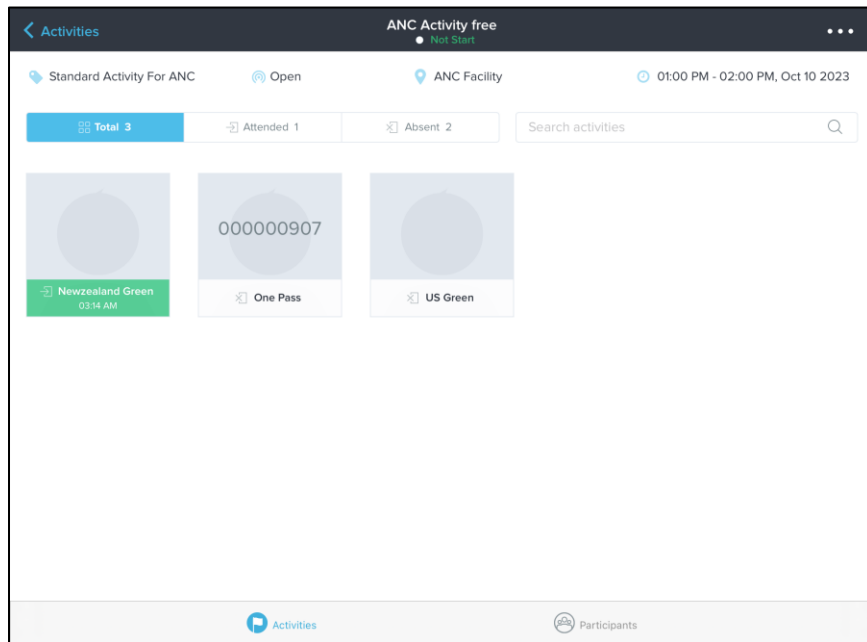
4. Collect the participant or pick-up person's **Signature**:
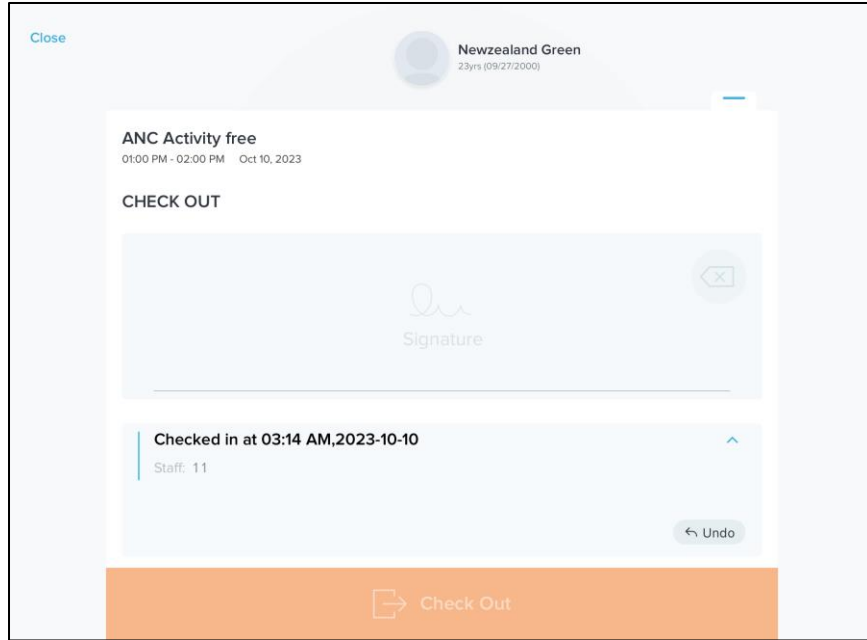
5.   Tap the **Check Out** button:
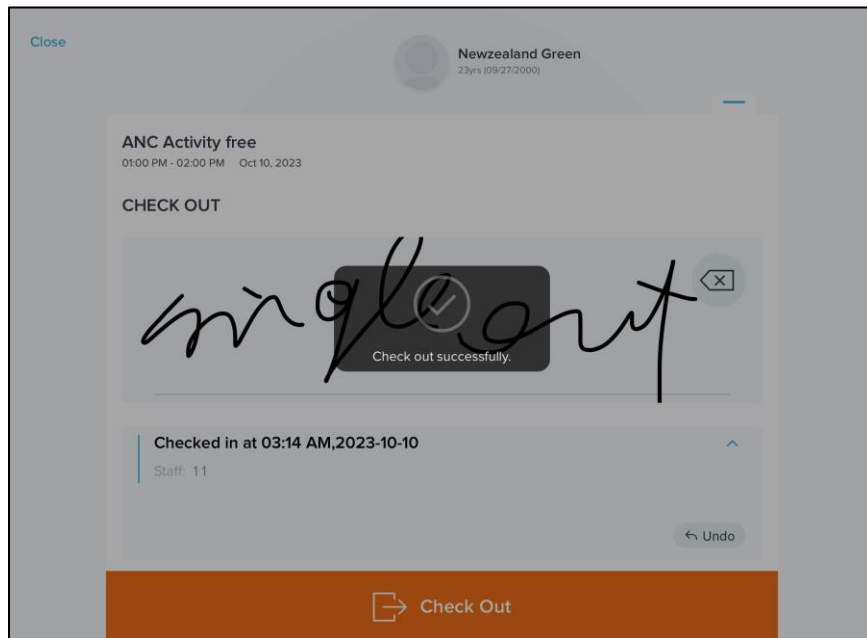
To undo a check-out, tap the checked-out participant and then tap the **Checked out** record > **Undo** button:
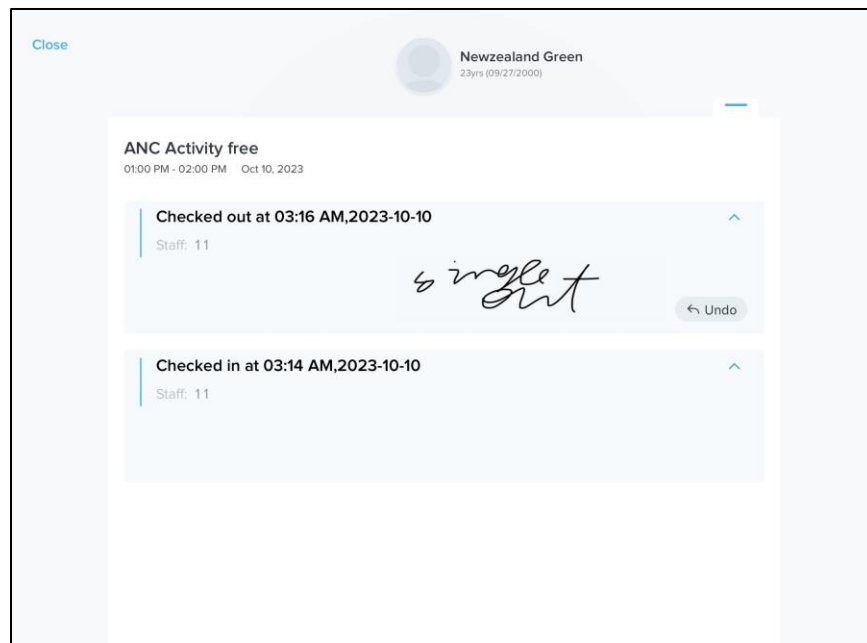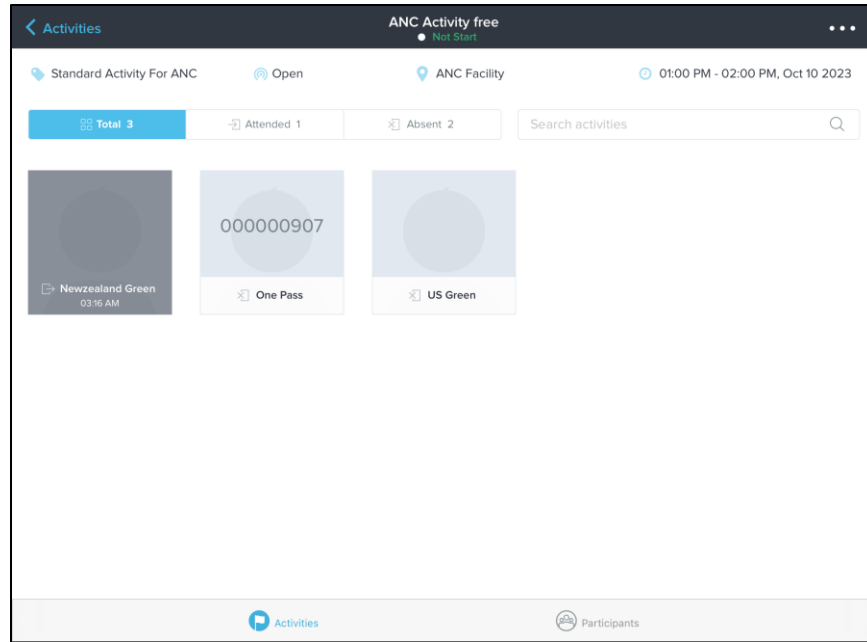
Checking in a group of participants (iOS only)

You can use the **Group Check In** feature to batch check-in multiple participants to an activity.

To check-in a group of participants:

1. Open the required activity.

2. On the top right corner, tap the ⋯ button and then select **Group Check In**.

3. Multi-select the required participants, then tap **Check In**.

4. If the activity requires a signature on check-in, then sign your **Signature**:
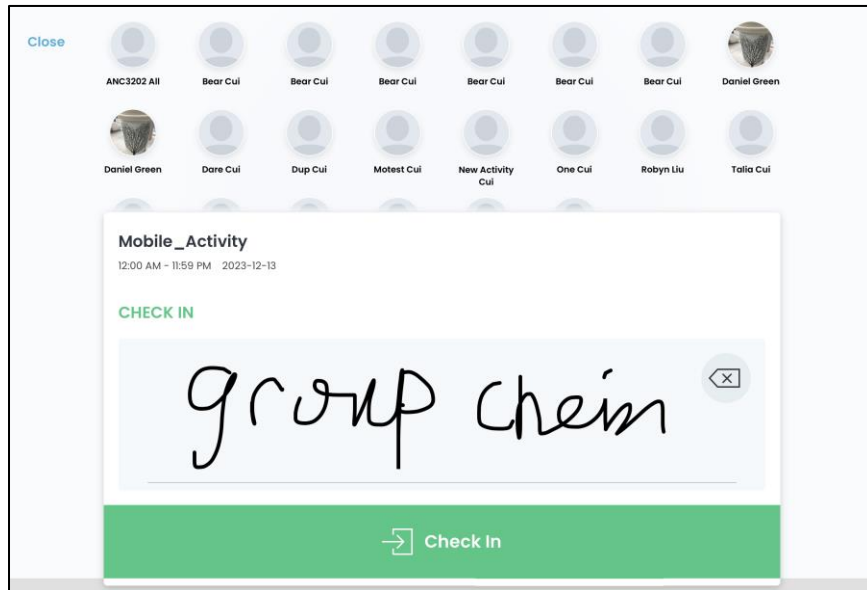
5. Tap the **Check In** button.

Checking out a group of participants (iOS only)

You can use the **Group Check Out** feature to batch check-out multiple participants from an activity.

To check-out a group of participants:

1. Open the required activity.

2. On the top right corner, tap the ··· button > **Group Check Out**:
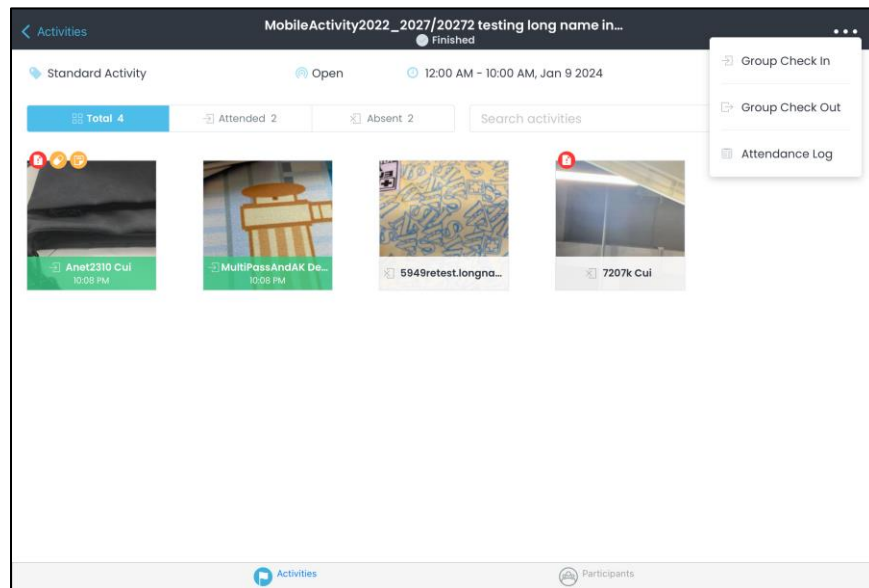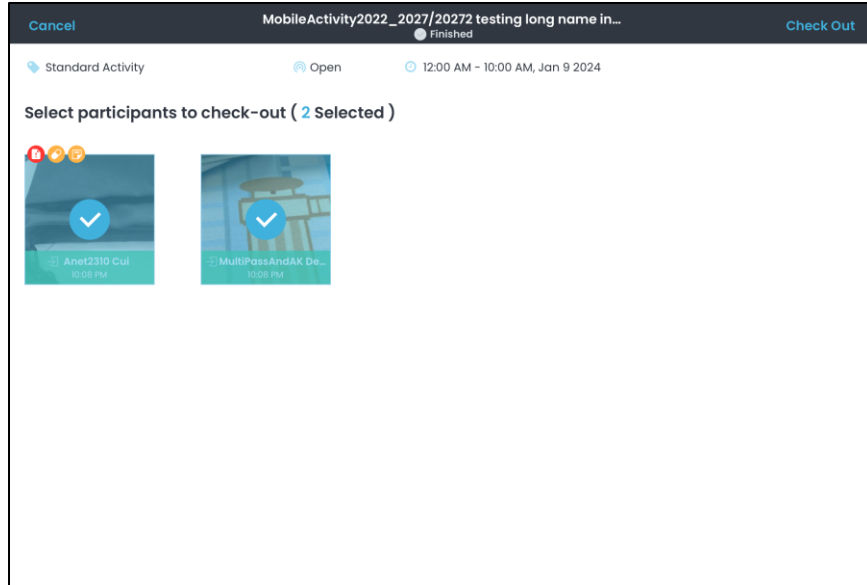
3. Tap to select the required participants, then tap **Check Out**:

4. If the activity requires a signature on check-in, then sign your **Signature**:
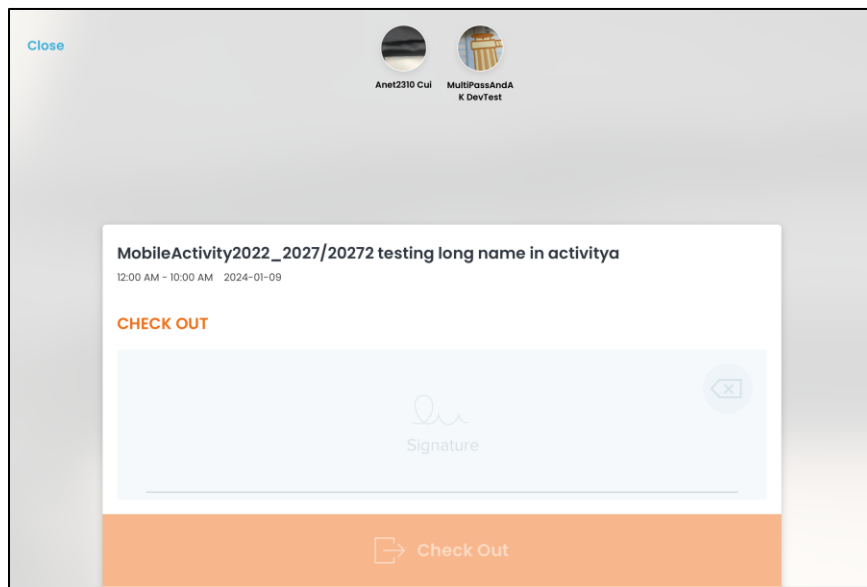
5. Tap the **Check Out** button.

Marking participants as absent

To better manage activity attendance, you can mark participants as absent from an activity on a past date, on the day of the activity or in advance and easily distinguish between participants who were absent, have not yet arrived and who will not be attending on that day.

For participants who were absent or have not been checked-in:

- to mark a participant as absent, on the **Activities** or **Participants** tab, select the required date and program, then on the required

participant's **CHECK IN** page, tap the **Absent** button and then select a reason for the absence:
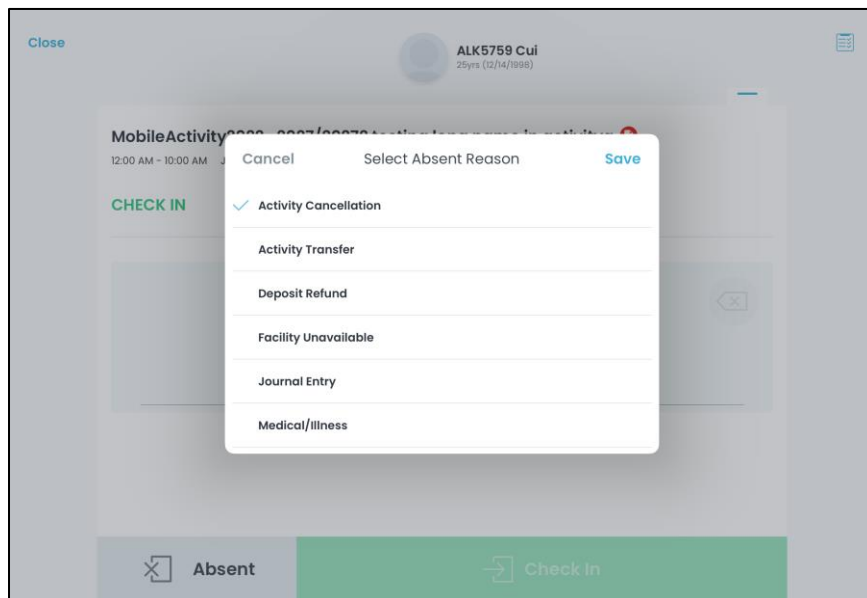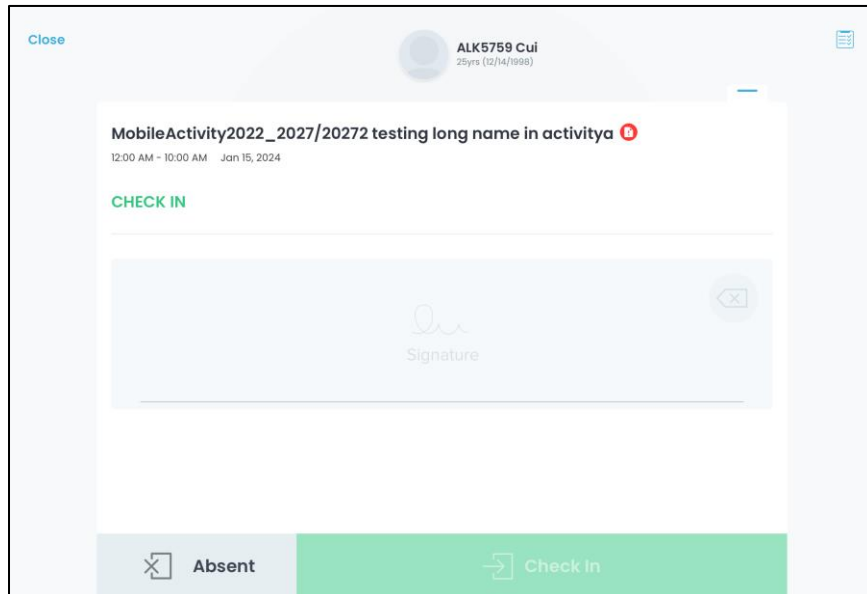
Viewing and exporting attendance log

You can view an attendance log for an activity as follows:

1.   Tap **Activities** tab > an activity > ••• > **Attendance Log**:

2. If required, change the activity or select additional activities by tapping the **All Activities** dropdown and then searching for and selecting the required activities:
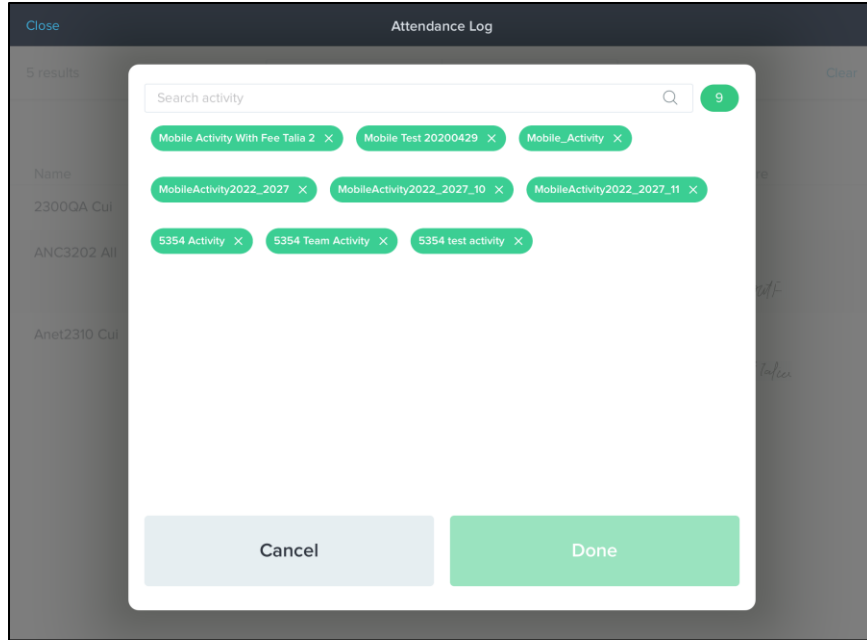
3. If required, change the date range by tapping the **Today** dropdown and then selecting the required date range:
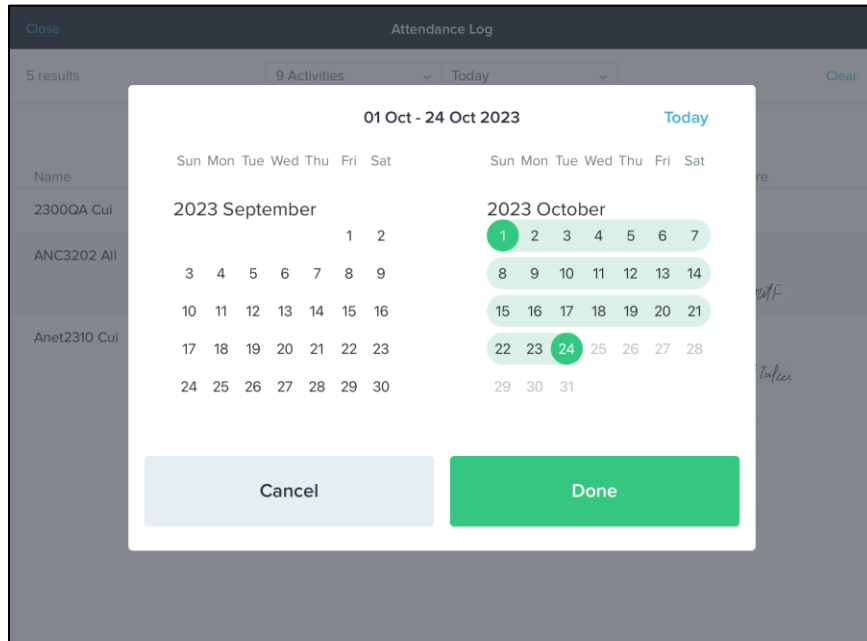
4. To view a participant's profile, tap the participant's name:
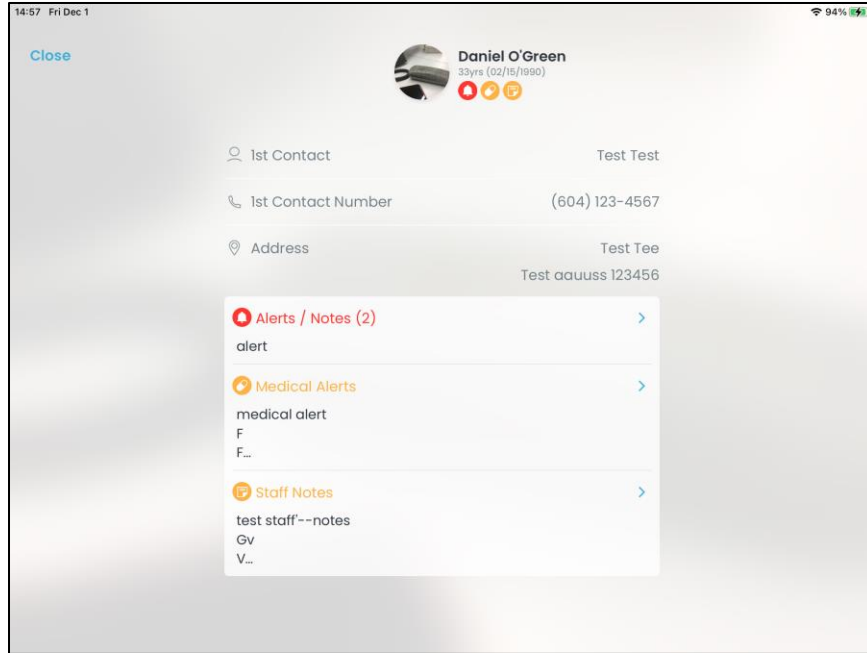
5. To export an attendance log for an activity (excluding private lessons):

   a) Tap the ⬆ icon.

   b) Enter recipient e-mail addresses (separated by ;) to which to send the exported activity attendance log.

   c) Select the **Attachment Format** > **CSV** or **PDF**.

   d) Tap the **Done** button.

![ACTIVENet logo]
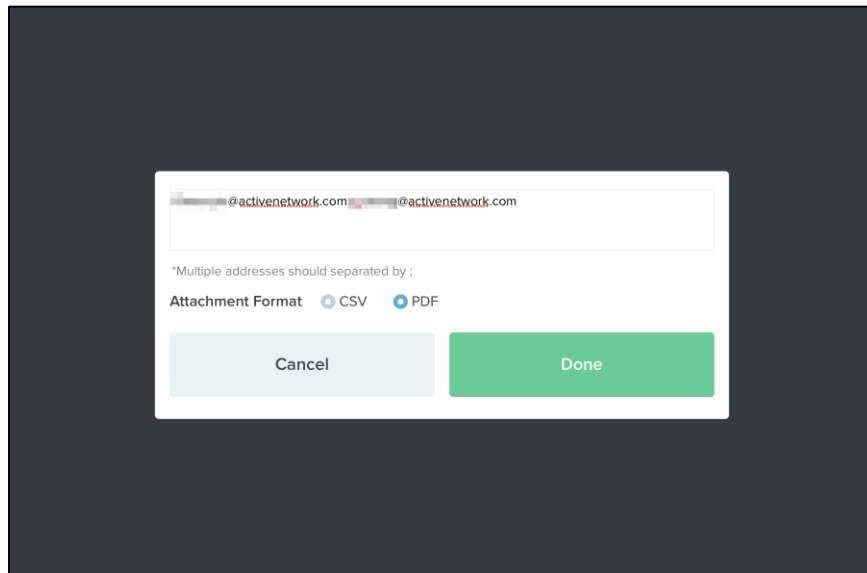
Attendance Log - Activity				Export Date: Dec 12, 2023 22:47 (by green admin)	

● Mobile_Activity
● Dec 12, 2023 - Dec 12, 2023

Dec 12, 2023

Name	Activity	Time		Username	Signature
111 666	Mobile_Activity	● In	7:24 PM	recware	
ANC3202 All	Mobile_Activity	● In	9:53 PM 2023-12-11	recware	require
		○ Out	12:08 AM	recware	
Bear Cui	Mobile_Activity	● In	12:05 AM	recware	
		● In	12:05 AM	recware	
		● In	12:05 AM	recware	Not require
		● In	7:15 PM	recware	
		● In	10:14 PM	gadmin	group
		● In	10:15 PM	gadmin	
		○ Out	12:06 AM	recware	

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Participants tab

The **Participants** tab page displays all participants who have register in activities on the selected day.

Selecting a required day

The **Kids** tab displays participants who are registered in activities on the selected day. Today is selected by default. To view other days:

- Tap the ﹀ icon, and then select the required day.
- In the activity list area, swipe left to move to the previous day.
- In the activity list area, swipe right to move to the next day.

Searching for participants

The **Participants** tab alphabetically lists all participants by last name.

To search for a participant, either enter the participant's name in the search box or tap the initial letter of the participant's last name. If you select a participant, you are directed to the **Participant Details** page. For more information, refer to [The Participant Details page](#).

Checking-in a group of participants

You can use the **Group Check In** feature to batch check-in multiple participants into activities.

To group check-in participants:

1. On the top-right corner of the **Activity** module > **Participants** tab, tap the ⋯ button.

![ACTIVE network logo]

2. Select **Group Check In**.

3. Select the required participants.

4. If the activity requires a signature on check-in, then sign your **Signature**:
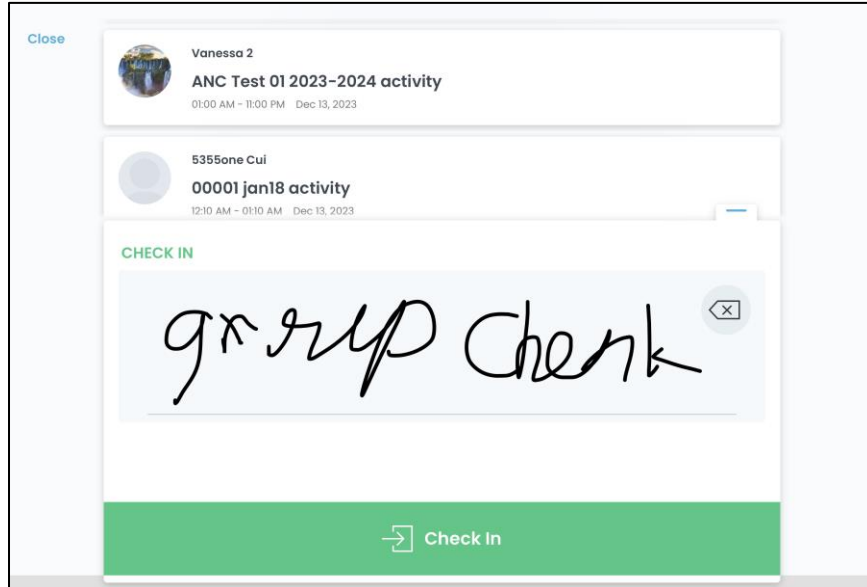
5. Tap **Check-in**.

6. For a participant with multiple activities, their earliest activity on that day is displayed. Tap the ⌄ button to view the participant's activities. If the default activity is not the required activity, then select another activity and check-in the participant.

Checking-out a group of participants

You can use the **Group Check Out** feature to batch check-out multiple participants from activities.

To group check-out participants:

1. On the top-right corner of the **Activity** module > **Participants** tab, tap the ⋯ button:
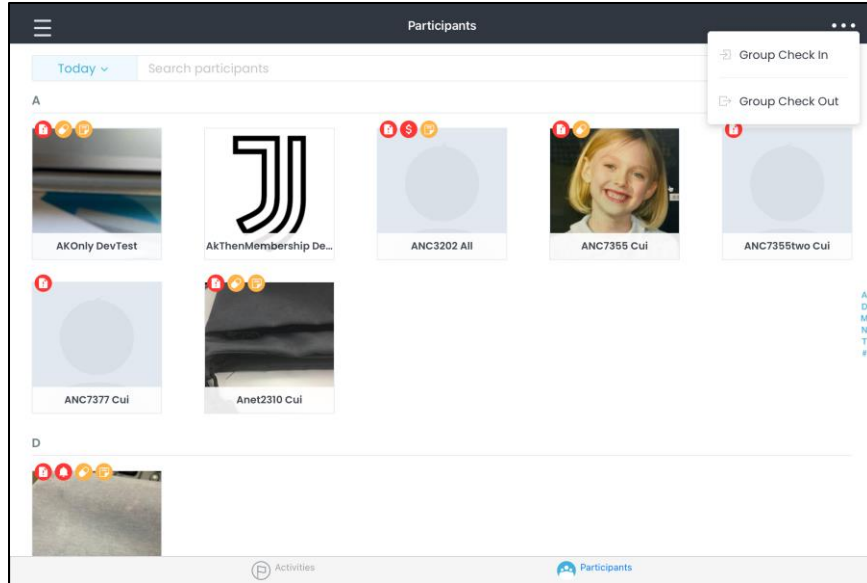
2. Tap **Group Check Out**.

3. Tap to select the required participants, then tap **Check Out**:
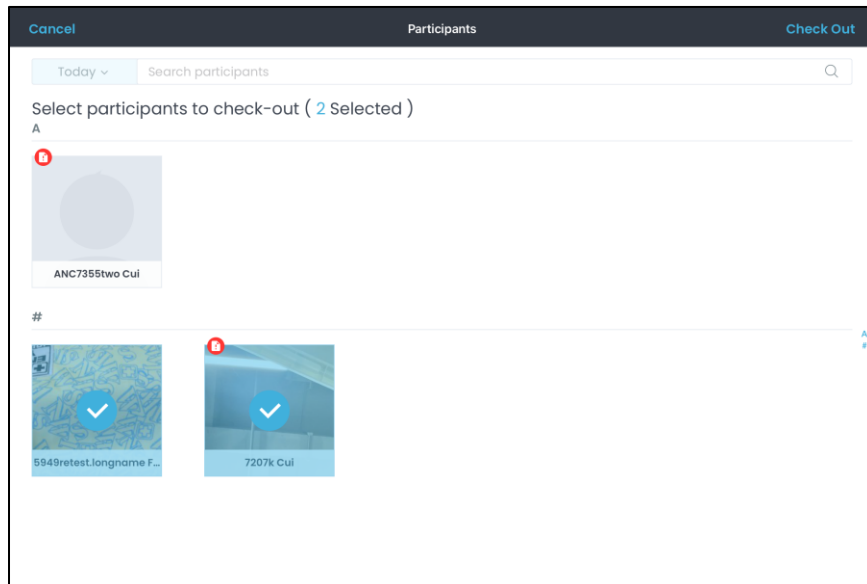
4. If the activity requires a signature on check-out, then sign your **Signature**:
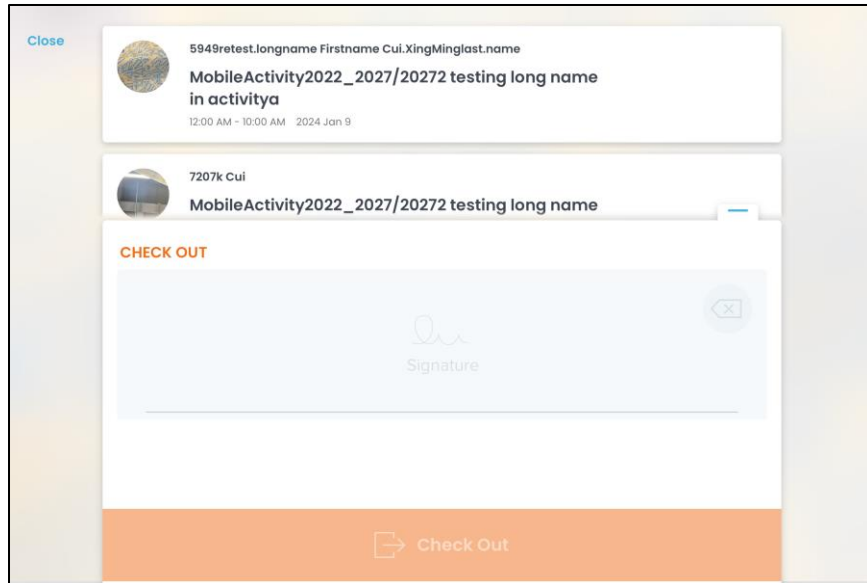
5. Tap **Check Out**.

Participant Details page

Checking in an activity participant

To check in a participant:

1. Tap the **Activities** tab > **Participants** tab:
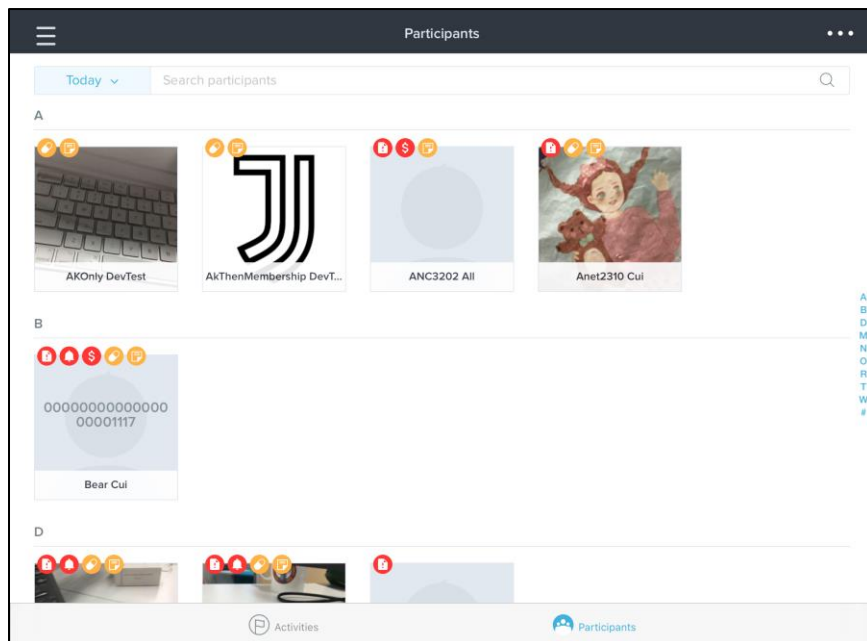
2. Tap the required participant.

3. Tap the ˅ icon next to the required activity:
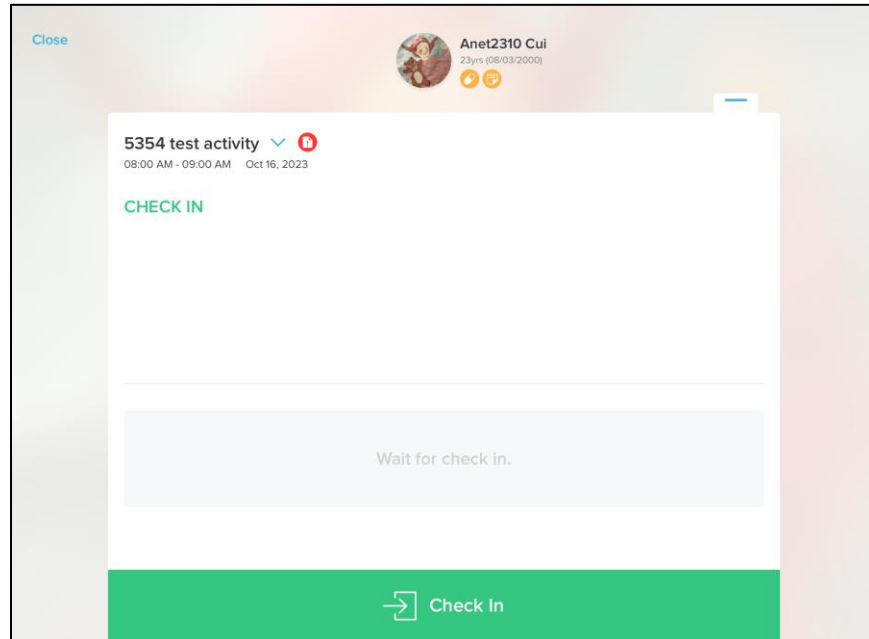
4. Tap the **Check In** button:
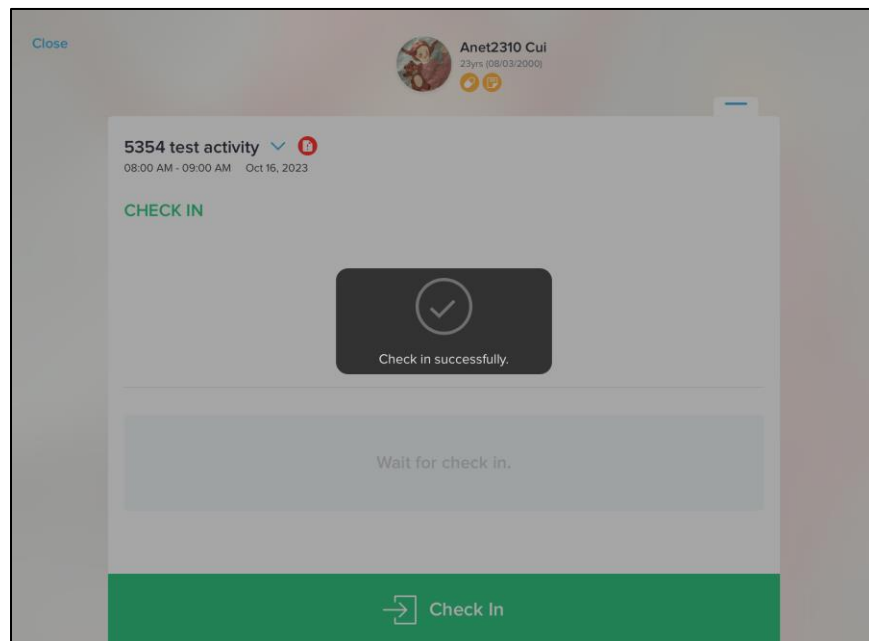
5. To undo a check in, tap the **Undo** button:
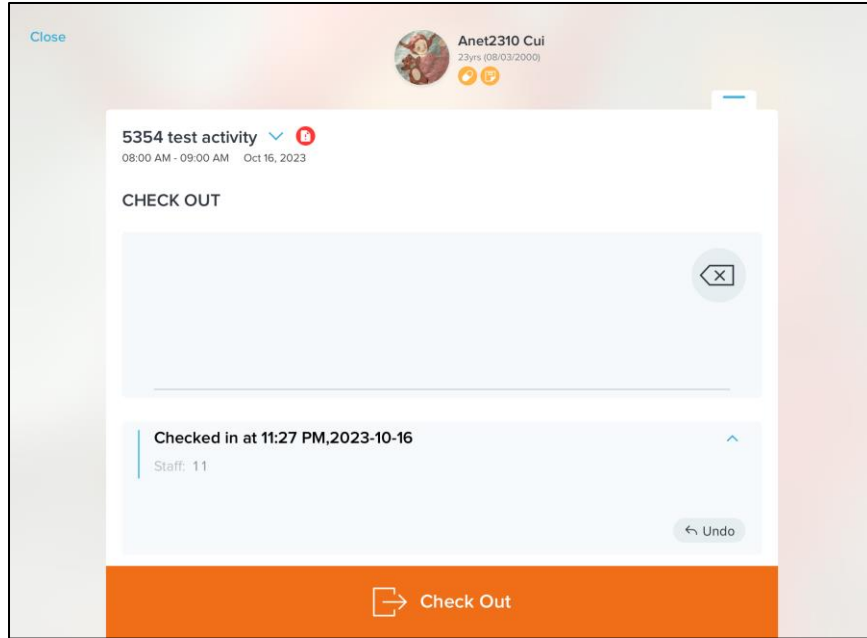
Checking out an activity participant

To check in/out a participant:

1. Tap the **Activities** tab > **Participants** tab:
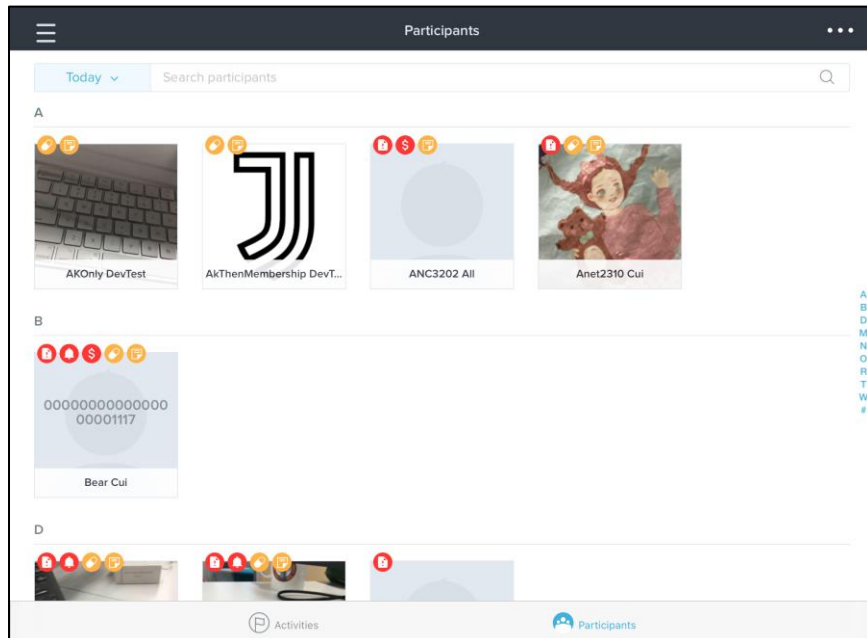
2. Tap the required checked-in participant.
3. Tap the ∨ icon next to the required activity:
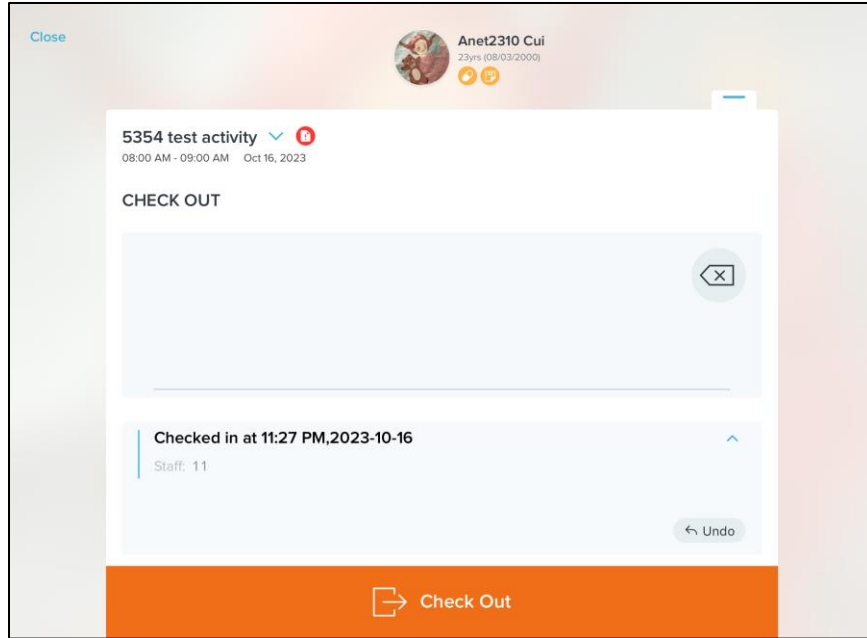
4. Collect the participant's signature:
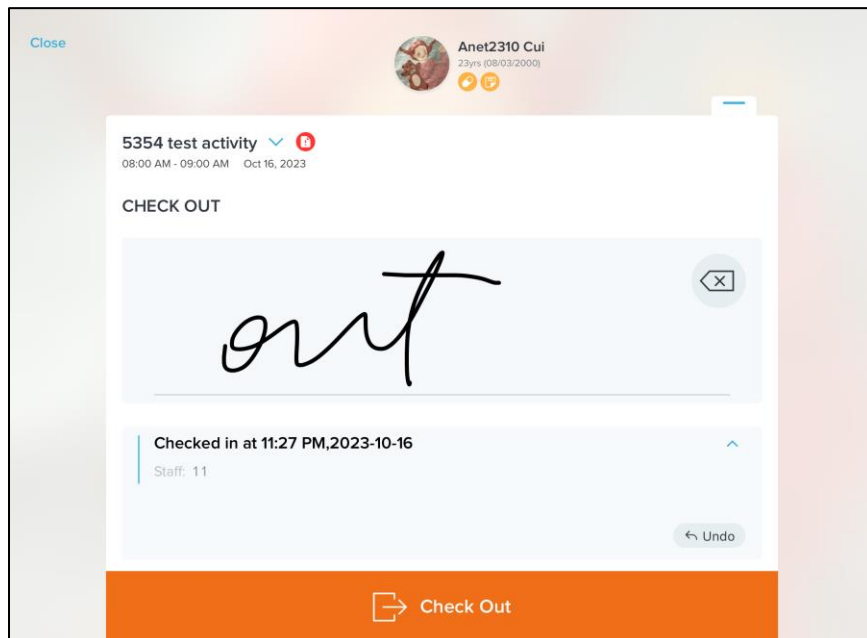
5. Tap the **Check Out** button:
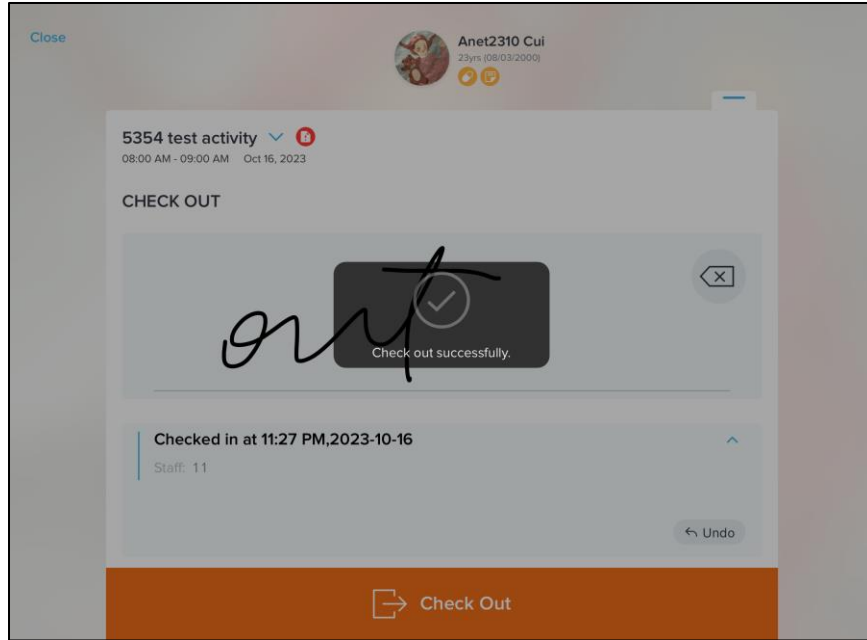
6. To undo a check out, tap the **Undo** button:
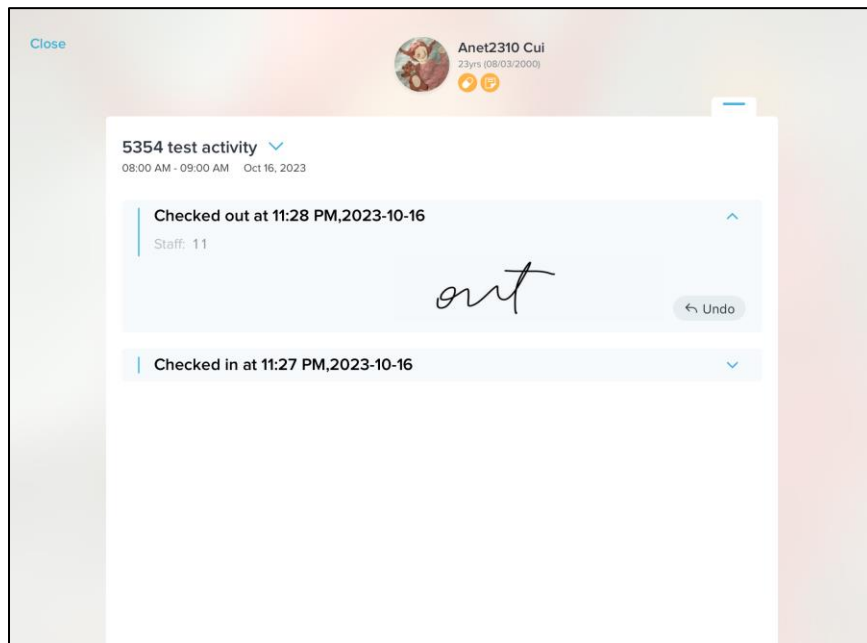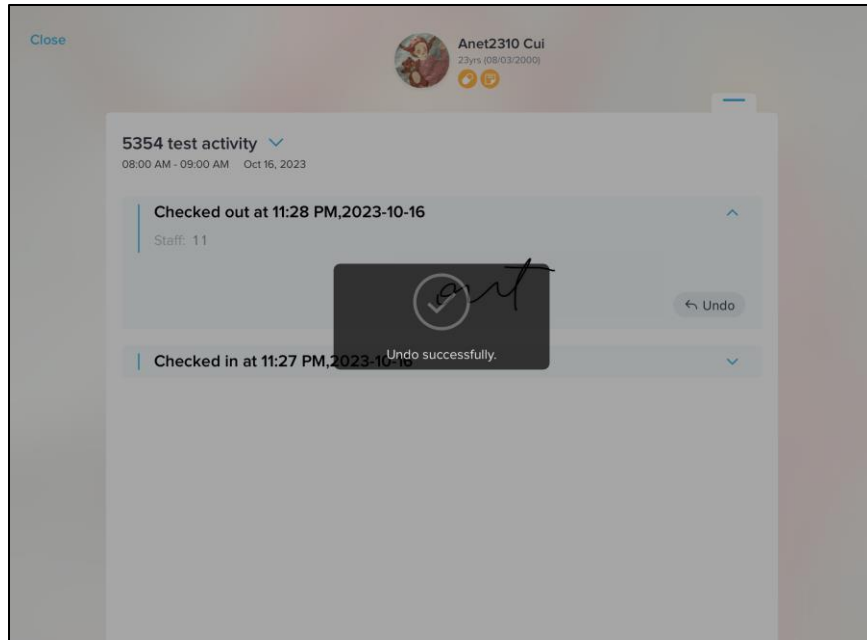
Viewing and updating a participant's information

To view basic participant details, on the top-right corner of the

Participant Details window, swipe down on the ⬤ icon.

- To edit a participant's details, tap the ✎ icon on the participant's avatar. On the **Edit Profile** page, update the avatar by using the iPad camera, and update contact information, if required.

- To view alerts and notes created in the ACTIVE Net AUI, tap the **Alerts** area.

- To add or edit medical alerts, in the participant's profile section, tap the **Medical Alerts** area.

- To prevent parents from seeing staff notes, the staff notes are hidden. To view staff notes, in the participant's profile section, swipe up to view the bottom of section.

- To add or edit staff notes, tap the **Staff Notes** area and enter the required content.

Check In > Membership module (iOS only)

The Check In > Membership module contains the following pages:

Pass Validation page (iOS only)

Staff users can use the **Pass Validation** module to scan barcodes on customers' passes via their iPad camera and then validate their entries.

After enabling the Pass Validation module, refer to The Others > The Settings page and select the required workstation.

Depending on the entry point associated with the current workstation, the **Pass Validation** page displays check-in or check-out history for the entry point. For example, if the entry point is configured as **Check-in Only Entry**, then only the **Checked-In** tab is displayed. To view checked-in or checked-out members, tap the **Checked-in** or **Checked-out** tab.

To prevent unauthorized personnel from seeing check-in records, you can hide the membership check-in history by selecting the **Summary** tab. The **Summary** tab only displays total, checked-in and checked-out member counts.
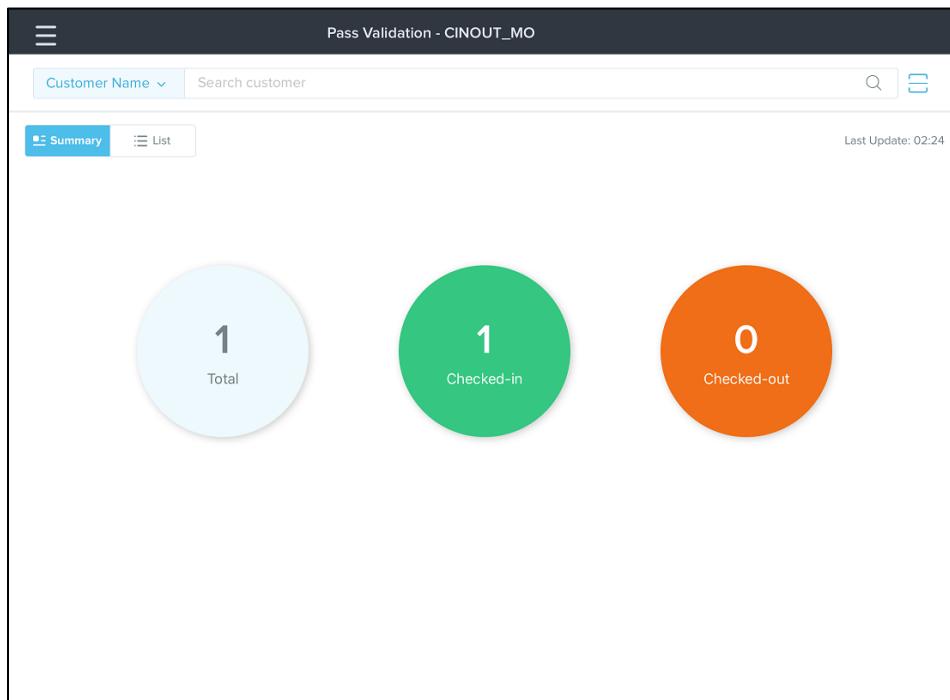
To view check-in or check-out details, tap the required record. If the member can be checked-in or checked-out at the entry point, then the **Check In** or **Check Out** button is displayed.

Check-in and check-out customers (iOS only)

Use the **Pass Validation** page to search for customers, validate customer passes or alternate keys and allow customers to gain access to a facility entry point. On the **Pass Validation** page:

1. To search for a customer, enter the customer's name in the **Search Name** field or tap the scan icon to scan the barcode on the customer's pass or alternate key.

2. Tap the **Customer Name** dropdown and select any other required search type (**Customer ID**, **Email Address**, **Pass Number**, **Telephone Number, Customer ID**, **Alternate Key Type**) to search for customers.

On the search result page, select the required customer.

The customer's membership packages are displayed. Depending on the entry point, membership package statuses are also displayed.

- If the customer's membership is checked-in, then the checked-in icon is displayed next to the membership name.

  Note that customers with an outstanding balance cannot check in. Only staff users with the **Front Desk: Membership - Outstanding Balance Scan** permission can override the outstanding balance warning and check-in the customer.

- Select a valid membership package and tap the check-in or check-out button. If the selected membership package is a family membership package, select the required family members and then proceed with check-in.
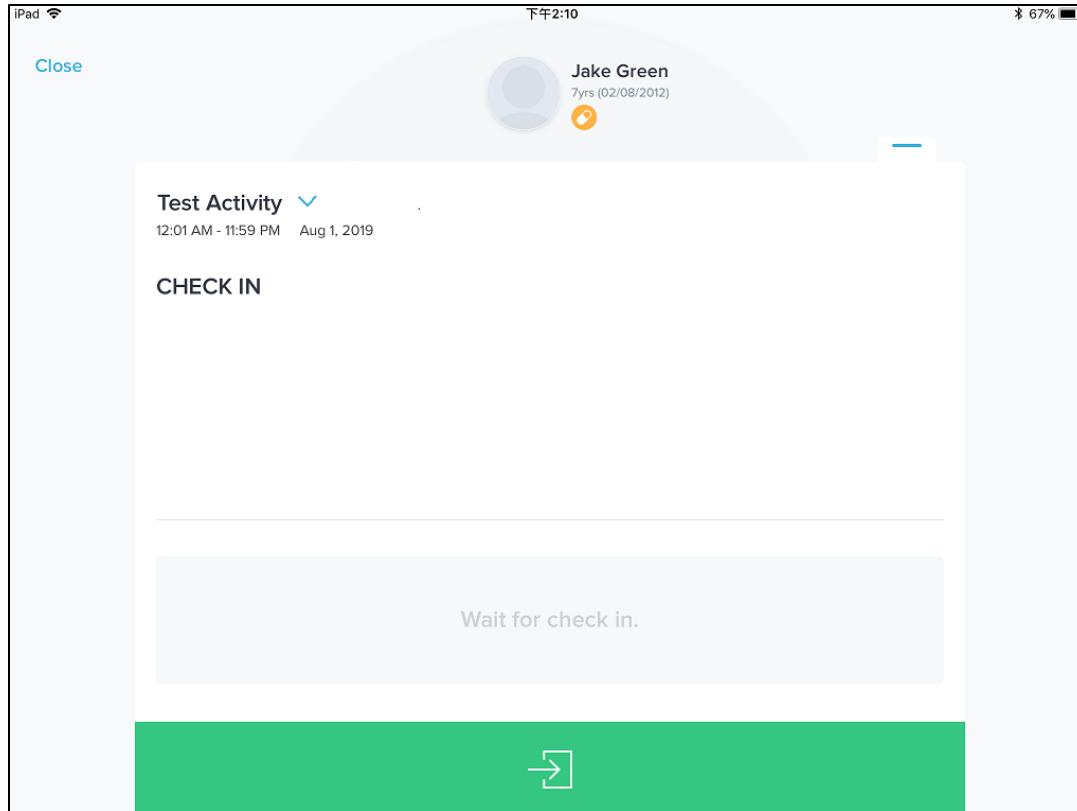
Viewing and updating a member's information (iOS only)

To edit member information:

1. On the **Pass Validation** page, search for and select the required member account.

2. On the top-right corner of the check in/out page, swipe down on the ▬ icon.

3. Edit member details or photo as required (similar to editing a participant, for more information refer to Viewing and updating a participant's information).

Enroll > Activity module (iOS only)

In the Enroll > Activity module, you can enroll customers in activities.

Enrolling a customer into an activity

To enroll a customer into an activity:

1. Tap ≡ and select **Enroll** > **Activity**.

2. The **Enroll Activity** page by default displays activities for the selected center. If required, enter keywords to search for activities by activity name or number. In the activity list, select the required activity.

3. After selecting an activity, the activity detail page is displayed. Tap the **Enroll Now** button to enroll the consumer into the activity.
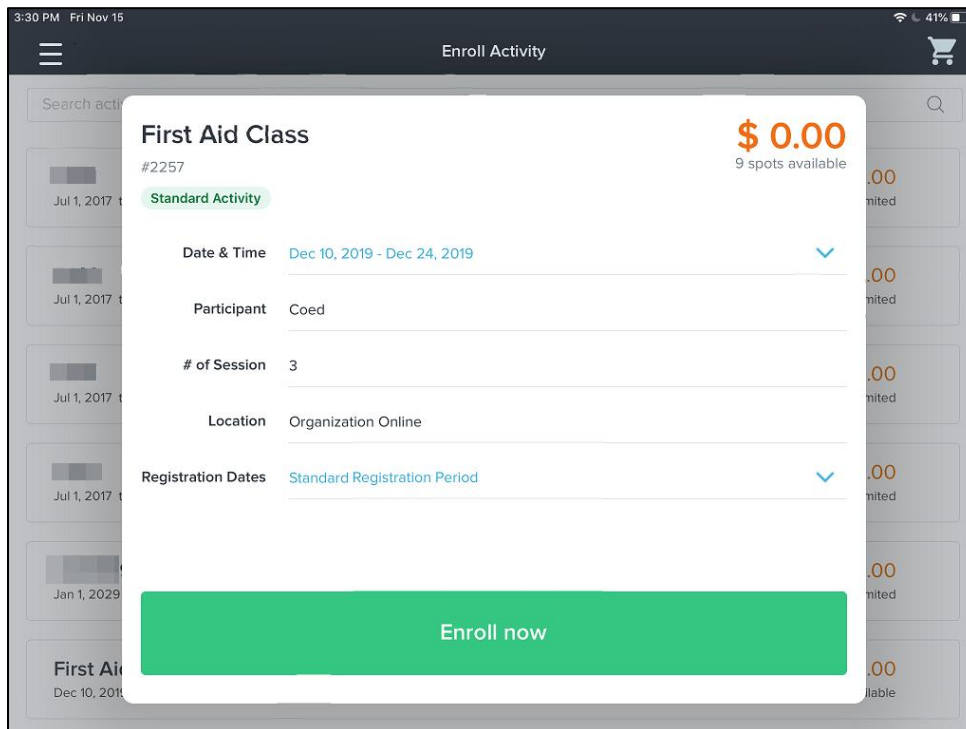
4. To enroll in the activity:

   - Tap **Select Customer** and select an existing customer account or create a new customer account.

   - Enter or select the information for all required fields.

     If overrides are required, then select the check boxes. If you do not have the required permission, then an **Authorize override** popup is displayed. Please ask a staff user with the required

permission to enter their username and password to authorize the override.

- If the **Fee** section is displayed, then review the displayed fees and click **Add to Cart**. Note that the fee total does not include non-absorbed transaction fees (applicable non-absorbed transaction fees are included in the total displayed on the **Payment** page).

5. On the **Shopping Cart** page,

- add another activity enrollment to the shopping cart by clicking **Continue Shopping**.

- review an activity enrollment by selecting the required activity enrollment.

- delete an activity enrollment by tapping the 🗑 icon next to the unwanted activity enrollment.

- pay for the enrollment transaction directly by tapping **Check Out**.
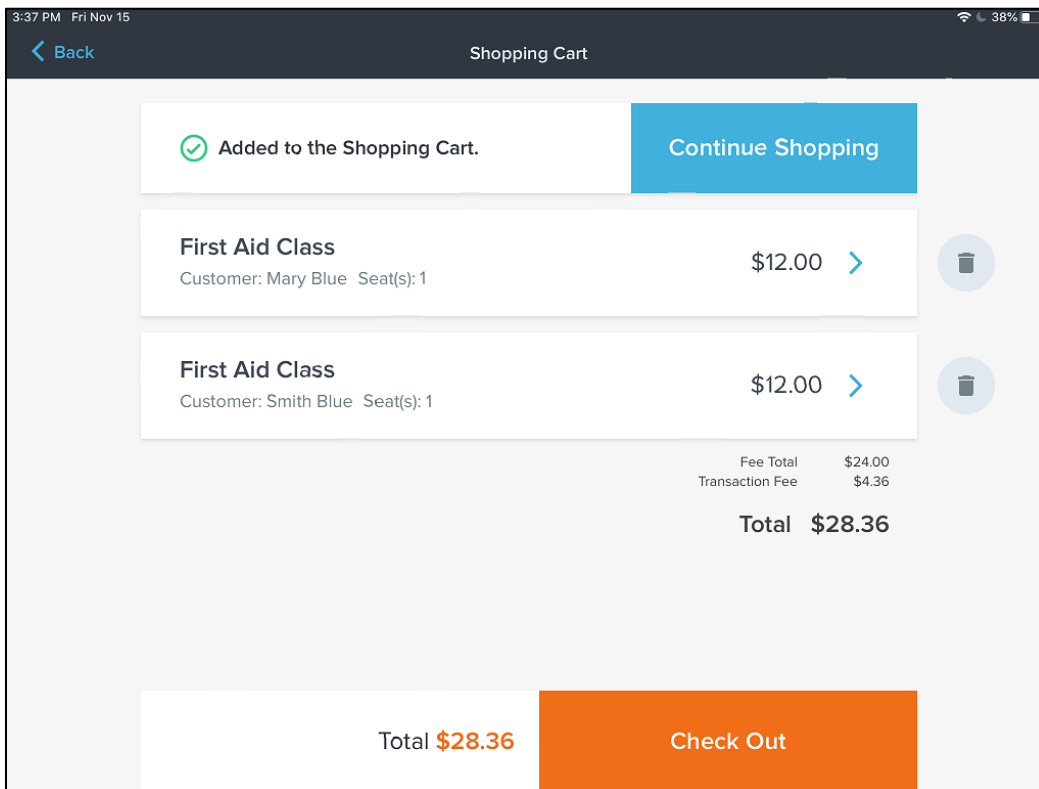
6. On the **Payment** page:

  a) Tap **Select a Payer** to select a payer or create a new payer.

     When the **ACTIVENet AUI** > **Administration Home** > **Financial Settings** > **Configuration** page > **Limit the payer to be a**

family member or an associated organization setting is enabled, on the **ACTIVENet Connect** > **Select Payer** page, users can only select a family member or an associated organization as the payer for the transaction.

b) Select the required payment method, complete the required fields and then tap **Pay**. For example, to pay with a credit card:
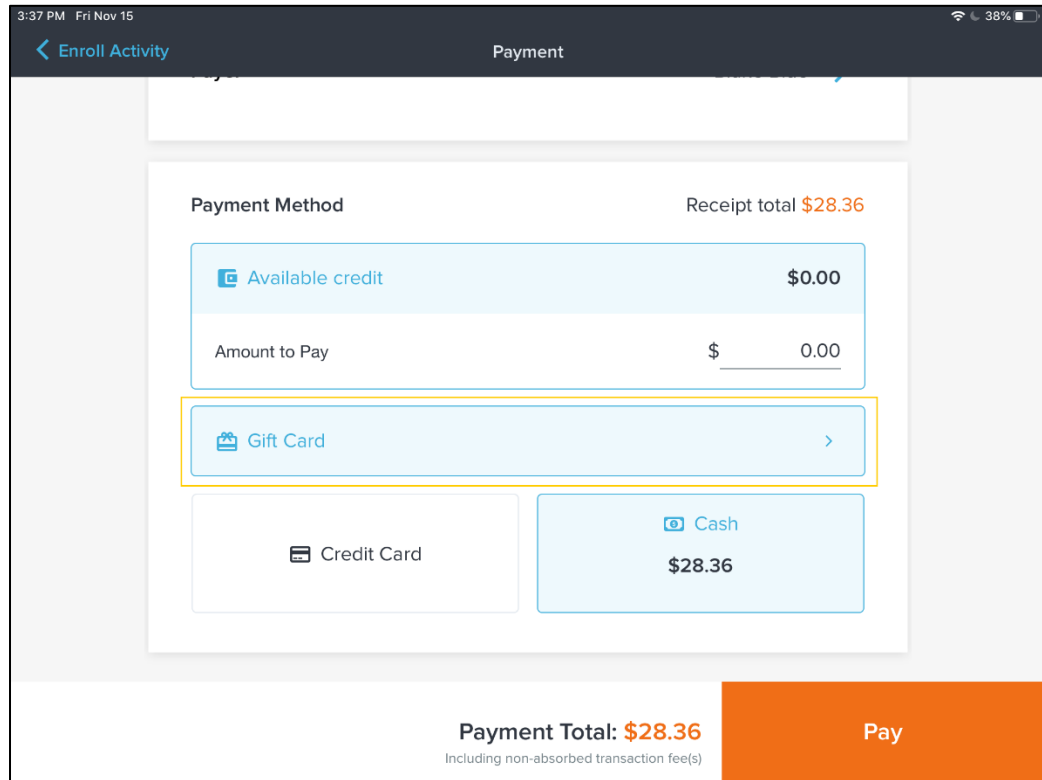
Only **Available Credit**, **Credit Card**, **Cash** and **Gift Card** payment methods are currently supported.

Note:

- The **Activity Enrollment** module currently only supports standard activities. A standard activity's activity type has the following components unselected:

    o   Activity Lists

    o   Prerequisites

    o   Private Lessons

    o   Sub-Activities

    o   Merchandise

    o   All Teams/Groups components

- For the Credit Card payment method, ACTIVE Net Connect currently does not support payment devices (such as a PIN pad device). To pay by credit card, please select a workstation without a payment device and manually enter the card number.

- Splitting payments is currently not supported.

- ACTIVE Net Connect currently does not support paying by a payment plan.

- Adding a customer to a waitlist is currently not supported. A full activity is not displayed in ACTIVE Net Connect. To add a customer to the waitlist for an activity, please use the ACTIVE Net AUI or CUI.

Others > Account Creation module (iOS only)

The Account Creation module enables users to create customer accounts using an iPad:

- Staff users can create new customer accounts on behalf of end users.

- To prevent end users from seeing the staff interface, staff users can enable the **Kiosk** mode by tapping **Kiosk** on the top-right corner.
The menu icon is then hidden, and staff users can hand the iPad over to end users and allow them to create new accounts by themselves.
After submitting account creation information, the account creation form is automatically restored, and the next end user can enter their information.

  o To exit the Kiosk mode and return to the staff interface, tap Staff Login on the top-right corner and enter the required staff user account and password.

Creating a new customer account

To create a customer account:

1. In the top-left corner, tap the ☰ icon.

2. Tap **Account Creation**.

3. Enter customer information in the required fields and tap **>**. On the fourth page, click > to create the customer account.

   If the 'ACTIVE Net AUI > Administration Home > System Settings > Configuration – General > Active Net Connect Setting section > Enable scan driver license' setting is enabled, users can tap the **DL Scan** icon to scan the QR code on a driver license to automatically populate customer information such as **First Name**, **Middle Name**, **Last Name**, **Date of Birth**, **Street Address**, **City**, **State**, and **Zip** in the **Account Creation** form.

4. On the **Account Created** page:

   o Select the **Head of Household** checkbox, if required.

   o Tap **Add Family Member** and enter family member information, if required. To exit the family account creation page, tap **×**.

   o To create another customer account, tap **Done**.

Note:
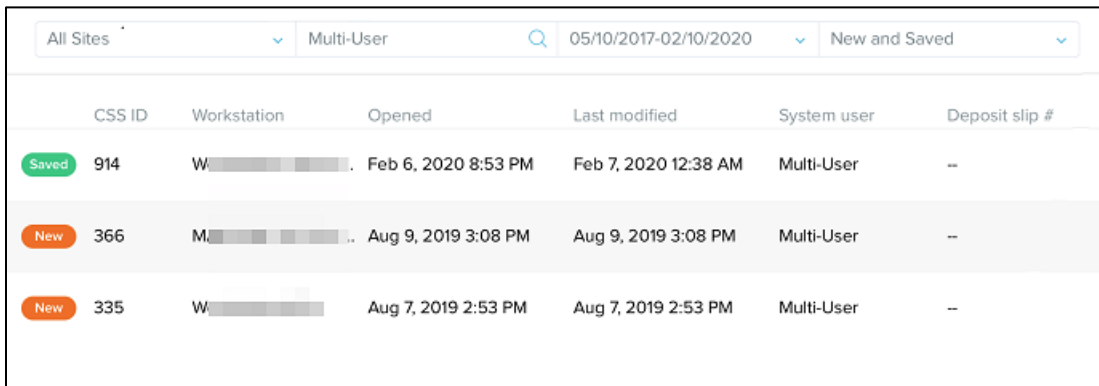
- The custom fields displayed in the **Account Creation** module are based on the **ACTIVE Net AUI > Administration > Population Settings > Configuration > Show During Account Creation** settings.

Others > Cash Summary module (iOS only)

The Cash Summary module enables users to search for and manage cash summary sheeting using an iPad.

To open the new **Cash Summary** module, in the main menu, tap **Cash Summary**. The **Cash Summary** module consists of the following pages:

- Cash summary sheet list page: staff users can search for cash summary sheets by site and workstation (defaults to the logged-in site and workstation), system users, date range or status.

	CSS ID	Workstation	Opened	Last modified	System user	Deposit slip #
Saved	914	W▓▓▓▓▓▓▓▓.	Feb 6, 2020 8:53 PM	Feb 7, 2020 12:38 AM	Multi-User	--
New	366	M▓▓▓▓ ▓▓▓ ..	Aug 9, 2019 3:08 PM	Aug 9, 2019 3:08 PM	Multi-User	--
New	335	W▓▓▓▓▓	Aug 7, 2019 2:53 PM	Aug 7, 2019 2:53 PM	Multi-User	--

(Search filters: All Sites | Multi-User | 05/10/2017-02/10/2020 | New and Saved)

Tapping a cash summary sheet in the list opens the cash summary sheet detailed page.

- Cash summary sheet detailed page: staff users can:

  o View and edit cash quantities and amounts for other payment types

  o Save the cash summary sheet by tapping **Save**

  o Close the cash summary by tapping **Close Cash Summary** on the top-right corner

Cash Summary Sheets   Sheet Detail   **Close Cash Summary**

Cash Summary Sheet ID 961   Saved

Opened on: Feb 10, 2020 02:26 AM   Workstation: M.
Closed on: --   System user:

Cash details   Unbalanced   **Cash to be deposited**   **$87.00**

Section total $93.00   Less-float $6.00

$1	-	3	+	x1
$10	-	3	+	x10
$20	-	3	+	x20

Other payment types   Unbalanced   **Section total**   **$246.00**

Batch total	$333.00
Actual transaction amounts	$0.00
Cash over (short)	$333.00

Save

Others > Waiver Management module (iOS only)

For better waiver management, staff users can use the **Waiver Management** module to view waiver statuses and request customers to sign unsigned waivers. To access the new Waiver Management module, tapping the ≡ button > **Others** > **Waiver Management**.

On the **Waiver Management** page:

- To search for a customer, enter the customer's name in the **Search Name** field.

- To search for a customer by **Customer ID** or **Pass Number**, tap the **Customer Name** dropdown and select the required search type.

- Tap the scan icon to scan the barcode on the customer's pass or alternate key.

The **Waiver Management** page then displays all matching customer accounts flagged as follows:

- customer accounts with an unsigned waiver which will be due in the future are flagged with a icon.

- customer accounts with an overdue unsigned waiver are flagged with a icon.
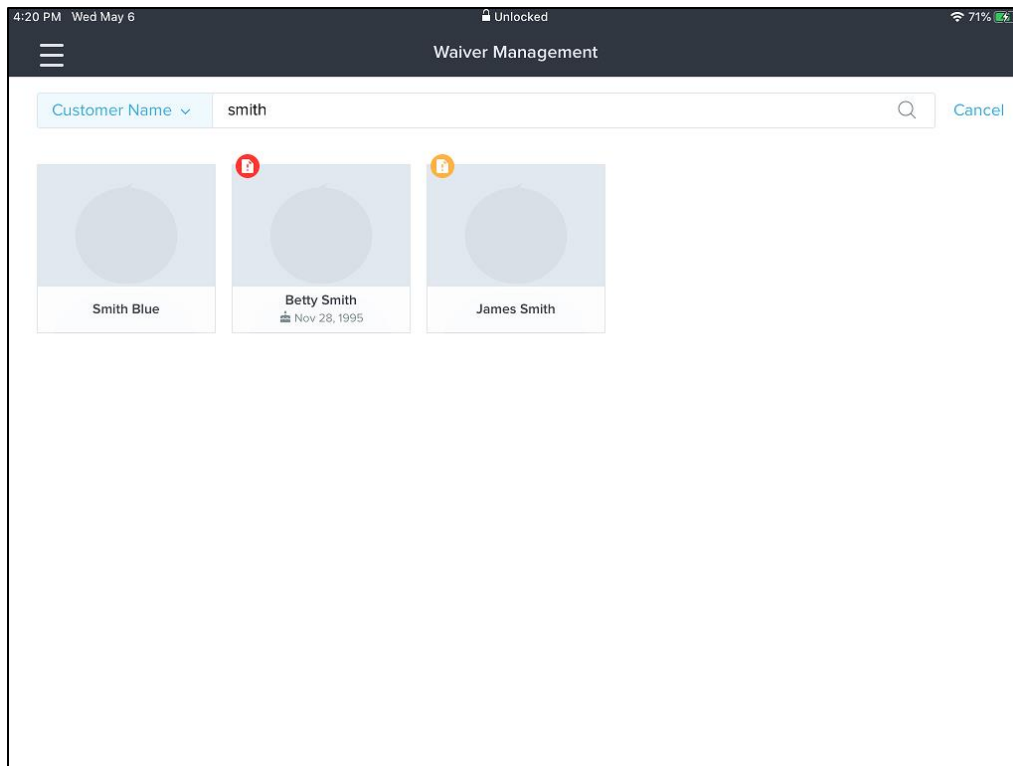
To view a list of waivers for a customer account, tap the customer's avatar. Each waiver is displayed with the waiver description, receipt number, receipt date and waiver due date.

- By default, the waiver list displays only unsigned waivers. To view all waivers for the customer, enable the **Include signed waivers** toggle switch.

- To view waiver details or sign an unsigned waiver, tap the required waiver.

Others > Settings page

To open the **Settings** page and configure ACTIVE Net Connect, in the top-left corner, tap the ☰ icon and then tap the **Others** > **Settings** button.

On the **Settings** page:

- To change the staff user's avatar, tap the avatar, and take a new photo using the iPad camera.

- To switch to another location, tap the **Site/Center/Workstation** field, and select the required site, center and workstation.

- To enable the **Child Watch** setting, turn on the **Child Watch** switch (by default, the **Child Watch** setting is **OFF)**.

  When the **Child Watch** switch is enabled, **Cubby** and **Parent Location** options on the **Check in** page are displayed and you can select a cubby and parent location during check-in.

  - **Parent location**: the location of the parent when the kid is in childwatch.

  - **Cubby**: the storage location where staff users store a kid's belongings.

- To automatically print out a pair of labels after each successful individual/group check-in to attach to the child and give to the drop-off person, turn on the **Print check-in label with each scan** switch and then follow the printer configuration procedure in Configuring a printer to print check-in labels.

- To enable a parent location, tap the **Parent Locations** button, and select the required locations as on. To disable a parent location, select the required location radio button as off.

  Note:
  - At least one location is required to be enabled.
  - The **Parent Location** setting is enabled only when the **Childwatch** setting is enabled.

- To display customer names either in First Name, Last Name or Last Name, First Name format, tap the **Name Display** field and select the required format.

- To change the app's display language, tap the **Language Setting** field, tap the required language and the tap **Save**.

- To view the ACTIVE Net Connect version and the Terms of Use for ACTIVE Net Connect, tap the **About** field.

Note:

- The time zone applied in ACTIVE Net Connect can be configured in the **ACTIVE Net AUI** > **Administration Home** > **System Settings** > **Configuration – General** page > **Regional Setting** section > **Time Zone** dropdown.

- To configure ACTIVE Net Connect in the AUI, go to the **ACTIVE Net AUI** > **Administration Home** > **System Settings** > **Configuration – General** page > **ACTIVE Net Connect Setting** section.

# Configuring a printer to print check-in labels (iOS only)

The ACTIVENet Connect app Child Watch feature can be configured to automatically print out a pair of labels after each successful individual/group check-in to:

- Attach to the child.
- Give to the drop-off person to pass to the authorized pick-up person.

The ACTIVENet Connect app supports printing of labels via a Bluetooth or WiFi connected Brother QL-820NWB label printer.

To configure the ACTIVENet Connect app to automatically print check-in labels:

1. Turn on the ☰ icon > **Others** > **Settings** tab > **Child Watch** switch and then the **Print Check-in Label with each Scan** switch:
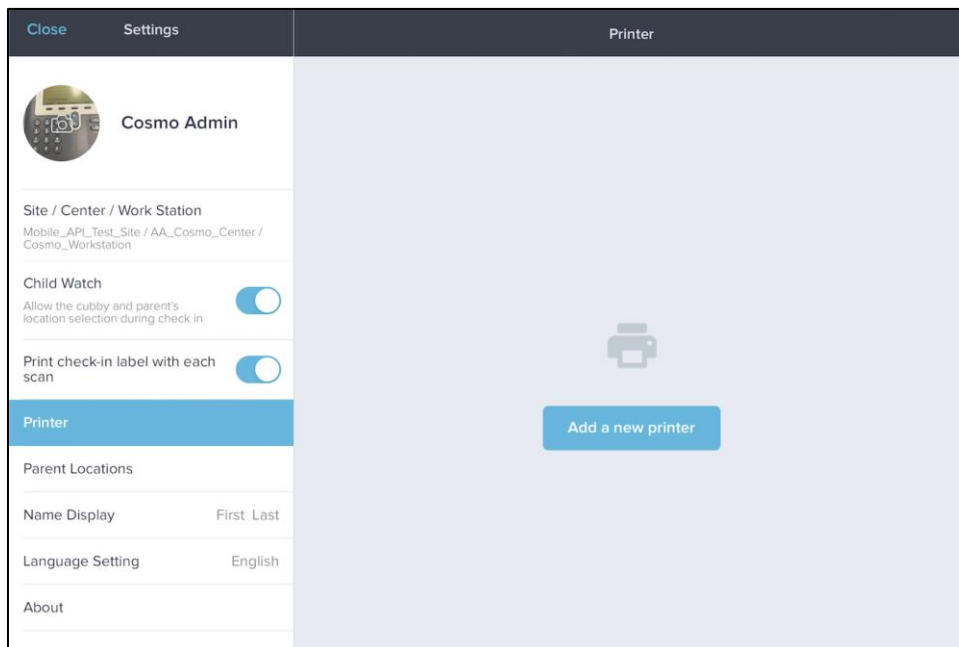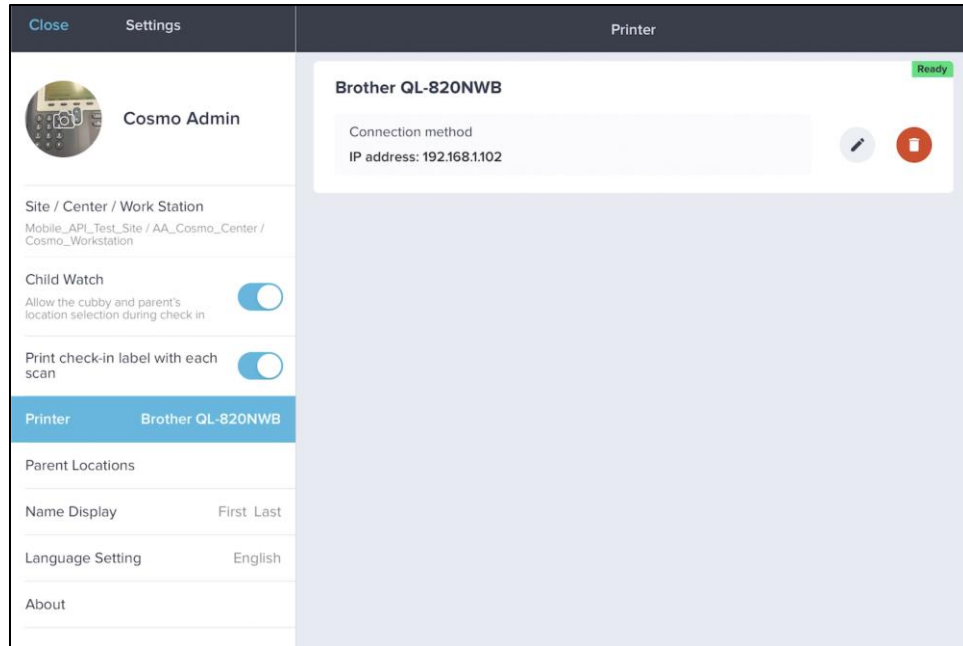

2. Tap the **Add a new printer** button.
3. In the **Printer settings** popup, select the printer connection method from **Bluetooth**, **WIFI** or static **IP address** (and then enter the IP address):
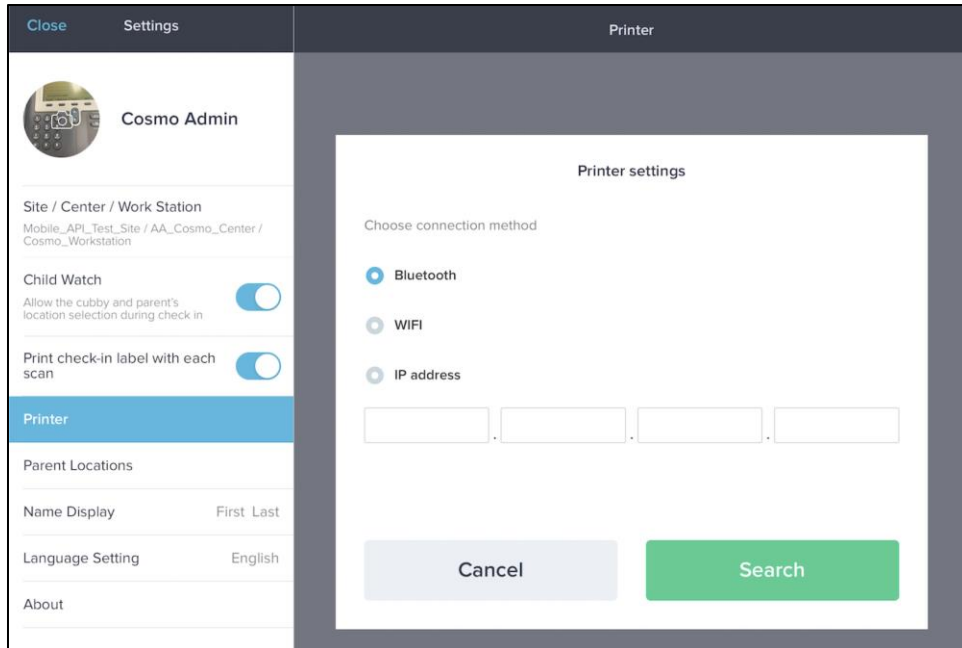
4. To find printers, tap the **Search** button:
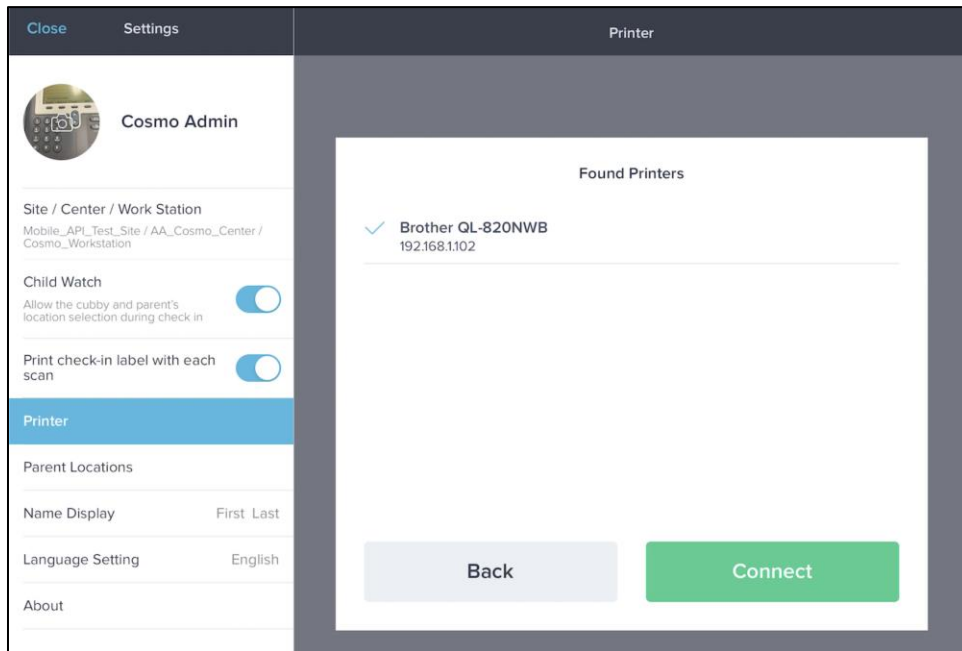
5. Tap to select the required printer and then tap the **Connect** button.

- To remove a printer, tap the 🗑 icon.
- To change a printer's connection method, tap the ✏ icon.
- If a printer is **Disconnected** or **Failed to connect to the printer**, then tap the **Retry** link.
- Some printers may require a template update which can only be upload via a **Bluetooth** connection. If a template update is required, then you will be requested to change the connection method to **Bluetooth** and then search for and re-connect to the printer to update the template, after which you may change to a different connection method.

After label printing is configured, in the individual and group check-in workflows, label pairs are automatically printed after each check-in (if no authorized pick-up person is configured, then this section is blank):