

Overview.....	2
Attendance IDs .....	2
Scanning Attendance IDs .....	4
Server-Side Processing.....	4
Manage Scan Session Files.....	5
Generate VolunteerMatters Interactions .....	5
Fulfill Requirements from Attendance Interactions .....	11
Fulfill Requirements from Volunteer Interactions .....	13

## Overview

---

The portable scanning devices allow operators to record attendance information in blocks called sessions. Once the session(s) have been closed device operators can “synchronize with server” to move session data files to your VolunteerMatters Administrative system for processing. This is where you can define where and how these attendance records should be recorded against member records. The overall process is as follows:

Prior to scanning:

- (1) Assign unique Attendance IDs to members
- (2) Produce bar-coded media to scan for members

From the portable scanning device:

- (3) Scan member barcodes with portable scanning devices, creating one or more scan “sessions”.
- (4) Synchronize session data from portable scanning device to the VolunteerMatters system

From the VolunteerMatters Administrative System:

- (5) Validate scan session data
- (6) Generate “Member Interactions” from scan data
- (7) Generate one or more requirement fulfillments from member interaction records

## Attendance IDs

---

### Overview

Within VolunteerMatters your member records can be assigned an Attendance ID. This is a unique ID that will be encoded in a barcode to identify a specific member record. This ID field is only used in conjunction with VolunteerMatters Attendance Tools. Though they may be populated with the same values, this ID field is entirely separate from the membership ID field.

Closerware’s recommended approach is to utilize pre-printed keychain ID tags for your membership. You can buy the key tags from Closerware in blocks of 500 with sequential Attendance IDs. You can then assign a specific key tag to a member. This provides numerous benefits.

- (1) Key tags are similar to those for bookstores, fitness centers, and grocery stores. They attach to your keychain and are more likely to be with you when attending events, programs, or facilities.
- (2) Key tags are easier to replace. If a member loses their key tag, you can just pick another from inventory and assign its unique code to that member.
- (3) Members can self-activate their Attendance ID to facilitate assignments
- (4) They are much less expensive to produce

## Assigning Attendance IDs

You can associate an Attendance ID to a member record in three different ways.

- (1) An administrator can manually edit a member record. This is typically most useful when assigning relatively few IDs to new members, transfers, or for replacement key tags.
- (2) A member can update the Attendance ID field via their 'My Profile' screen. This is very useful when assigning IDs in mass to your membership. For example, you could simply distribute key tag IDs to your members and instruct each member to visit the 'My Profile' section of the website, edit their core member data, and type in the unique ID on the key tag they were given to "activate" the ID.

To track activations, your administrators can run reports and filter email and letter merges to only include those members who have yet to activate their ID card (member records where Attendance ID is empty). The scans for those members who use the card before activating it will not be lost. As soon as they do activate the ID all previous scans associated with that ID will now be associated with the member.

- (3) You can bulk import Attendance ID values via a "member update import". The import file itself only requires one column for the member's membership ID and a second column for their Attendance ID. You can make all assignments in a single spreadsheet then upload the assignments in mass.

## Barcode Reports

There are two reports that may include a barcode encoded with each member's Attendance ID. The first is a "Sign-In Sheet" report. This report can include member name, status, a space for signature, time in and time out columns, and the member's Attendance ID barcode. This can be used for those events where a portable scanning device is not available or as a backup to a member forgetting their ID. The sign-in sheet could be scanned at a later date/time to record an individual's attendance.

The second is a "Member Attendance Sheet" report. This report produces a PDF file that can be printed on Avery 5160 or compatible labels to be adhered to existing ID cards, name badges, or other items.

NOTE: Depending on your printer, ink, quality of paper, and other factors, self-printing of barcodes is not always 100% predictable. Closersware highly recommends testing barcode output with a portable scanning device prior to use in a real-time environment. Additionally, paper-based barcodes tend to wear over time, so if they are to be re-used there is a higher probability that they will not be recognized by the scanning device. We strongly recommend the primary use of PCV/Plastic key tag IDs only relying on paper-based barcodes as a secondary scan method.

## Scanning Attendance IDs

---

Closerware's VolunteerMatters Attendance Tools provides portable, wireless scanning device(s) running Closerware's attendance-tracking software. The device does not require a PC and can communicate directly with Closerware's services over the Internet.



The portable scanning devices allow operators to record attendance information in blocks called sessions. Once the session(s) have been closed device operators can "synchronize with server" to move session data files to your VolunteerMatters Administrative system for processing.





For more information the usage of the scanning device please refer to the "VolunteerMatters Attendance Tools Portable Scanning Device" user guide

## Server-Side Processing

---

With the activation of VolunteerMatters Attendance Tools there is a link from the VolunteerMatters Admin menu for "Attendance". Visiting this link presents four options for converting scans to member interactions and converting interactions to fulfillments.

**Attendance**

			
Sessions	Scan Data	Event Attendance	Volunteer Attendance

Session – Validate scan session data uploaded from portable scanning device(s)

Scan Data – Generate "Member Interactions" from scan data

Event Attendance – Generate requirement fulfillments from attendance interaction records

Volunteer Attendance - Generate requirement fulfillments from volunteer interaction records

## Manage Scan Session Files

### Overview

After you have successfully “Synchronized with Server” from your portable scanning device, all session data files will be moved from your local device over the Internet to your VolunteerMatters system. You may navigate to [Admin](#) > [Sessions](#) to view the list of all session files that had previously been “synchronized” with the server and are awaiting conversion to VolunteerMatters interactions and/or requirement fulfillments.

#### Attendance Scan Sessions

ID	Upload Date	Session Name	Scanner Name	Session Start	Notes (Closerware Only)	Status	Status Date
2	2007-10-15 10:38:17.0	15 Jun 2003 01:34:53 AM	1	2003-06-15 01:35:11.0	CustomerCode=null ScannerName=1 SessionName=15 Jun 2003 01:34:53 AM	New	2007-10-15 10:38:17.0

### Edit

You may click edit to the right of the session to override the session name and/or scanner name that was assigned at the time the scans were made.

## Attendance Scan Session Edit

ID 2

Upload Date 2007-10-15 10:38 AM

\* Session Name

\* Scanner Name

Session Start 2003-06-15 1:35 AM

Notes CustomerCode=null|ScannerName=1|SessionName=15 Jun 2003 01:34:53 AM

Status New

Status Date 2007-10-15 10:38 AM

You may want to update the session name and device name that was set at the time of the scan by the device operator to something more consistent with common naming practices. For example, you may have three people using three different devices recording attendance to the same “January General Meeting”. One person may name their session “Jan Gen Member Meeting”, a second person may call it “January GMM”, and another may name the session “JAN 15 Gen Meet”. Overriding session names and device names allows you to be more consistent in naming for common events and programs.

### Process

Click process to accept the scan session and make it available for conversion to VolunteerMatters interactions

## Generate VolunteerMatters Interactions

### Overview

VolunteerMatters allows you to store “Interactions” in a member’s record. There are several types of interactions including:

- Communication
- Donation (only for customers who do not subscribe to RaisingMatters)
- Attendance
- Volunteer

Attendance provides tools to convert scan data to either Attendance or Volunteer Interactions. Attendance interactions are for those events where you want to record whether or not the person attended (typically one scan per event). Attendance interactions allow you to record an event name, attendance type (customizable), date, time, and notes. If you had in and out scan times this could be set to appear in the notes field.

Volunteer interactions are for those events where you want to track the start time and end time a person volunteered (typically two or more scans per event for in and out times). Volunteer interactions allow you to record an event name, attendance type (customizable), date, start time, end time, and notes.

#### View

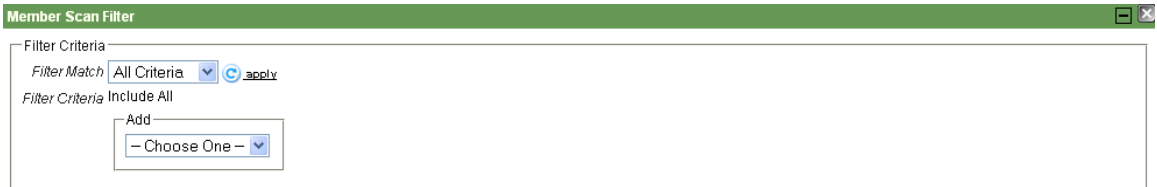
From [Admin](#) > [Scan Data](#) you may view a listing of all scan data that has yet to be associated with a member interaction. In the list you will notice session name, scanner name, scan date and time, scan status, the associated member’s ID and name.

Import ID	Session Name	Scanner Name	Scan Time	Scan Data	Status	Membership ID	First Name	Last Name
1	2	15 Jun 2003 01:34:53 AM	1	6/15/03 1:35 AM	757284	New		<a href="#">edit</a>
2	2	15 Jun 2003 01:34:53 AM	1	6/15/03 1:35 AM	757284	New		<a href="#">edit</a>

**NOTE: If there are listings without a member’s name or ID this means that the scanned barcode has not yet been associated with a member.**

### Filter

Your first step should be to narrow the list of scans to only include scans that would be processed similarly.

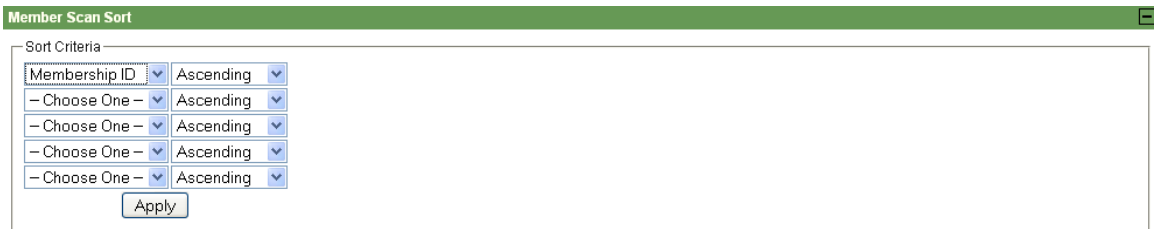


The screenshot shows a dialog box titled "Member Scan Filter". It contains a "Filter Criteria" section with a "Filter Match" dropdown menu set to "All Criteria" and an "Apply" button. Below this, there is a "Filter Criteria Include All" section with an "Add" button and a dropdown menu currently showing "- Choose One -".

You can do this by filtering on the scan data (session name, scanner name, scan date, scan data, scan status member first and last name, and member ID). For example, you could filter to only include scans that have the session name "January General Meeting".

### Scan View

You may view the data in two modes, "Scan View" and "In/out View". Scan view lists the event scans as single scans assuming one scan per event. This is the view that is typically used when generating attendance interactions. This view allows you to change the sort order of scan records.



The screenshot shows a dialog box titled "Member Scan Sort". It contains a "Sort Criteria" section with five rows of dropdown menus. The first row is set to "Membership ID" and "Ascending". The other four rows are set to "- Choose One -" and "Ascending". There is an "Apply" button at the bottom.

You may choose to sort by one or more of the scan fields, in ascending or descending order.

### In/out View

The "In/out View" pairs scans assuming that the odd number scans (first, third, fifth, etc.) scans for a member on a specific date is a start time and the even numbered scans on that date for that member are end times. This is the view that is typically used when generating volunteer interactions.

Import ID	Session Name	Scanner Name	Scan Time	Scan Data	Status	Membership ID	First Name	Last Name	flag	
1	2	15 Jun 2003 01:34:53 AM	1	6/15/03 1:35 AM	757284	New			In	<a href="#">edit</a>
2	2	15 Jun 2003 01:34:53 AM	1	6/15/03 1:35 AM	757284	New			Out (0:0)	<a href="#">edit</a>

**Edit**

Clicking edit to the right of a specific scan will allow you to edit a single scan. Clicking “Mass Edit” will allow you to edit all scans included in the filter. When editing scans you may delete the scan, or update the scan(s) status to “ignore” or “new”. Those scans marked as ignore will not be included in processing and those marked as new will be processed.

**Edit Scan Data**

ID 11  
 Import ID 2  
 Session Name 15 Jun 2003 01:34:53 AM  
 Scanner Name 1  
 Scan Stamp 20030615T01:35:11  
 Scan Time 2003-06-15 1:35 AM  
 Scan Data 757284  
 \* Status   
 Status Date 2009-08-18 2:49 PM

**Process**

Before clicking “Process” make sure you are in the proper view mode (in/out or scan view). The view selected prior to clicking “Process” will determine if the system should bundle in and out scans. If you are in Scan View prior to clicking “Process”, the system will treat each scan record as a unique interaction. If you are in In/Out View prior to clicking “Process”, the system will bundle scans to pair in and out scans and record the pair as a single interaction. If you process scans in “In/out View” it will only process those scans that have been paired. In other words, it will not process scans that have an “in”, but no “out” scan. These would have to be processed in “Scan View”.

Clicking “Process” progresses then prompt for the type of interaction you would like to create (Attendance or Volunteer).

**Process Scan Data**

Filter Criteria

Scan Filter All of the following are true:

1. Scan Date is on or after 2009-08-01 and is before 2009-08-15

3 records to process.

\* Scan Type In/Out Scans  
 Create Attendance or Volunteer Records?



Options on Attendance Interactions:

**Process Scan Data**

Filter Criteria

*Scan Filter* All of the following are true:

1. Scan Date is on or after 2009-08-01 and is before 2009-08-15

0 records to process.

\* *Scan Type* Single Attendance Scans

\* *Record Type* Attendance

\* *Attendance Date* Use Scan Date

\* *Attendance Time* Use Scan Time

*Attendance Type* - Choose One -

*Subject*

\* *Scan Session Name* Do Not Use

*Notes*

*Append to Notes*

Session Name

Scanner Name

Scan Time

**Attendance Date and Time** – You may use the actual scan dates and times or manually set dates and times for all scans to the same value. This is especially important when using paper-based sign in sheets. If today you were to scan a sign in sheet from several days prior, the scans would have today's date and time. You would want to override the scan date and time with the event's actual date and time.

**Attendance Type** – Select from one of the attendance interaction types (customizable within VolunteerMatters configuration)

**Subject** – Enter a descriptive subject of the attendance interaction

**Scan Session Name** – Choose not to use the scan session name or prepend/append it to the interaction subject.

**Notes** – Enter any relevant notes about this interaction

Append to Notes – Choose one or more scan data elements (session name, scanner name, and/or scan time) from the scan to append to the interaction notes

Options on Volunteer Interactions:

**Process Scan Data**

---

Filter Criteria

*Scan Filter* All of the following are true:

1. Scan Date is on or after 2009-08-01 and is before 2009-08-15

---

0 records to process.

\* *Scan Type* Single Attendance Scans

\* *Record Type* Volunteer

\* *Volunteer Date*

\* *Start Time*

\* *Stop Time*

*Volunteer Type*

*Subject*

\* *Scan Session Name*

*Notes*

*Append to Notes*

Session Name

Scanner Name

Scan Time

Volunteer Date, Start Time, Stop Time – You may use the actual scan dates and in/out times or use set dates, start times and end times for all scans to the same values. This is especially important when using paper-based sign in sheets. If today you were to scan a sign in sheet from several days prior, the scans would have today's date and time. You would want to override the scan date and time with the event's actual date and time.

Volunteer Type – Select from one of the volunteer interaction types (customizable within VolunteerMatters configuration)

Subject – Enter a descriptive subject of the volunteer interaction

Scan Session Name – Choose not to use the scan session name or prepend/append it to the interaction subject.

Notes – Enter any relevant notes about this interaction

Append to Notes – Choose one or more data elements (session name, scanner name, and/or scan time) from the scan to append to the interaction notes.

Click “Process” to generate interactions with the above settings.

## **Fulfill Requirements from Attendance Interactions**

### **Overview**

You may generate fulfillments based on attendance or volunteer member interactions that were generated by Attendance tools, those manually created by an administrator, and those imported via VolunteerMatters import utilities.

### **View**

This presents you with a listing of all attendance interactions for your membership. The listing displays the attendance interaction’s date, subject, notes, type, member name, and requirement flag.

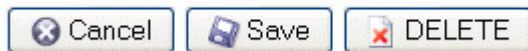
### **Filter**

By default the list of interactions is filtered to show only interactions dated within the last 30 days. Your first step should be to narrow the list of interactions to only include those that should fulfill the same requirement in the same manner. You can do this by filtering on the interaction properties (Date, type, subject, notes, member name, member ID, and requirement flag). For example, you could filter to only include interactions of type “General Meeting” that occurred on a specific date.

### **Edit**

Clicking “Edit” to the right of a specific interaction or clicking “Mass Edit” will allow you either delete the interaction(s) or change the Requirement Flag.

\* Requirement Flag



### **Requirement Flags:**

Inapplicable – By default, all interactions are set to be “Inapplicable”. Inapplicable scans are those scans that cannot be used to generate fulfillments to requirements.

Applicable – Only interactions marked as “Applicable” may be used to generate fulfillments.

Applied – After using the attendance tools to generate a requirement fulfillment from an interaction, the system automatically sets the interaction to have a requirement flag of “Applied”. This flags the interaction so administrators know that it had at one time been

applied as a fulfillment to a member requirement, thereby discouraging duplicate fulfillments. “Applied” scans are not available to generate fulfillments to requirements. The system does allow an administrator to manually change interaction requirement flags to or from “Applied”. This accommodates unique circumstances where a single interaction may fulfill multiple.

### Requirement Processing

After you filter the attendance interactions, you may click the “Requirement Processing” button to define how you would like the interactions applied to member requirements.

\* *Requirement*

\* *Fulfillment Type*

\* *Fulfillment Date*

\* *Points*

*Notes*

*Append to Notes*

- Attendance Date
- Attendance Time
- Attendance Type
- Attendance Subject
- Attendance Notes

**Requirement** – Select the requirement this attendance interaction fulfilled

**Fulfillment type** – Select from one of the fulfillment types

**Fulfillment Date** – Chose to set the fulfillment date to the attendance interaction date or manually designate a specific date.

**Points** – Define the number of points to be credited to the member for attendance to this event.

**Notes** – Enter any relevant notes about this fulfillment.

**Append to Notes** – Choose one or more data elements from the interaction record to append to the fulfillment notes.

## Fulfill Requirements from Volunteer Interactions

### View

This presents you with a listing of all volunteer interactions for your membership. This includes those interactions that were generated by Attendance tools, those manually created by an administrator, and those imported via VolunteerMatters import utilities. The listing displays the volunteer interaction's date, times, subject, notes, type, member name, and requirement flag.

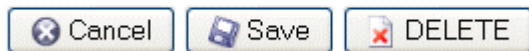
### Filter

By default the list of interactions is filtered to show only interactions dated within the last 30 days. Your first step should be to narrow the list of interactions to only include those that be process the same requirement in the same manner. You can do this by filtering on the interaction properties (Date, type, subject, notes, member name, member ID, and requirement flag). For example, you could filter to only include interactions of type "General Meeting" that occurred on a specific date.

### Edit

Clicking "Edit" to the right of a specific interaction or clicking "Mass Edit" will allow you either delete the interaction(s) or change the Requirement Flag.

\* Requirement Flag



### Requirement Flags:

**Inapplicable** – By default, all interactions are set to be "Inapplicable". Inapplicable scans are those scans that cannot be used to generate fulfillments to requirements.

**Applicable** – The only interactions that can be converted to fulfillments are those marked as "Applicable".

**Applied** – After using the attendance tools to generate a requirement fulfillment from an interaction, the system automatically sets the interaction to have a requirement flag of "Applied". This flags the interaction so administrators know that it had at one time been applied as a fulfillment to a member requirement, discouraging duplicate fulfillments. "Applied" scans are not available to generate fulfillments to requirements. The system does allow an administrator to manually change interaction requirement flags to or from "Applied". This accommodates unique circumstances where a single interaction may fulfill multiple requirements.

### Requirement Processing

After you filter the volunteer interactions, you may click the “Requirement Processing” button to define how you would like the interactions applied to member requirements.

\* *Requirement*

\* *Fulfillment Type*

\* *Fulfillment Date*

\* *Fulfillment Points*

*Notes*

*Append to Notes*

- Volunteer Date
- Volunteer Time
- Volunteer Type
- Volunteer Subject
- Volunteer Notes

**Requirement** – select the requirement this volunteer interaction fulfilled

**Fulfillment Type** – select from one of the fulfillment types

**Fulfillment Date** – Chose to set the fulfillment date to the volunteer interaction date or manually designate a specific date.

**Points** – Choose to fulfill the requirement in direct proportion to the total hours volunteered (time between in/out scans – 1 hour equals 1 point) or you may define the specific number of points the volunteer interaction will be credited against this requirement.

**Notes** – enter any relevant notes about this fulfillment

**Append to Notes** – Choose one or more data elements from the interaction record to append to the fulfillment notes.