

Facility Access, Version 5.2

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Unique Systems, Inc.

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by Unique Systems, Inc.

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Chapter 1. Introduction to Facility Access

ThinSoft products are designed to facilitate transaction processing for your organization. This manual, *Facility Access*, shows you how to set up and use the Facility Access module in order to make the best use of its built-in capabilities.

You will find here both general discussions of the module's operations and explanations of the specific procedures involved.

This manual builds on your understanding of basic *ThinSoft* data-entry features introduced in the *Learning ThinSoft* manual. The use of print options and selection criteria is also covered in *Learning ThinSoft*.

Chapter 2. Facility Access Behavior Settings

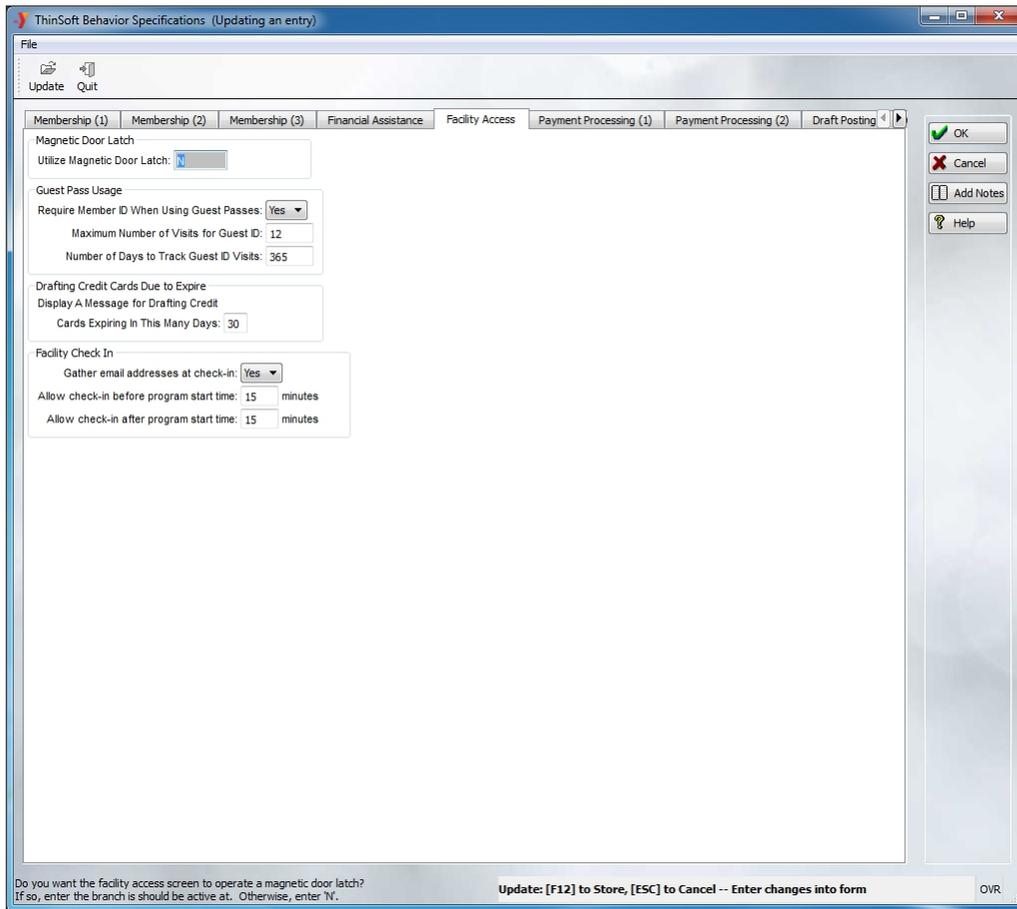
Facility Access Behavior Settings

While the setup chapter of the *Facility Access* manual will discuss your options for entering data into the system, there are some configurable options discussed here that can be used to change the appearance and functionality of the Facility Access module. These behavior settings should be set when *ThinSoft* is first installed and configured. Care should be taken when considering changing these settings once your system has been in use as changing some behavior settings in a live system can have unexpected repercussions. Please contact *Unique Systems, Inc.* if you're considering changing the behavior settings for Facility Access and you're not sure how the changes will affect your data and system performance.

To customize Facility Access behavior settings:

1. From the *ThinSoft* main menu, click - **Accounting**.
2. Click - **General Setup**.
3. Click - **Administration**.
4. Double-click **ThinSoft Behavior Settings**.
5. Click  **Update**.
6. Click the **Facility Access** tab.

Figure 2-1. ThinSoft Behavior Settings, Facility Access Tab



7. Change any of the following settings as needed.

- *Magnetic Door Latch*

Some facilities may be equipped with magnetic door latches. The system can be instructed to automatically open a magnetic door latch upon a successful check in.

Utilize Magnetic Door Latch

If you would like a successful check-in on the "Facility Access" screen to activate an automatic magnetic door latch, specify the branch code where the door is located. Otherwise, enter "N".

- *Guest Pass Usage*

You can require that guest passes must be associated with a valid member ID in order to gain facility access.

Require Member ID When Using Guest Passes

Specify "Yes" or "No". Setting this switch to "Yes" will require guests to be entered in the "Membership Information" screen which will assign them a membership ID to be used in order to gain facility access.

Maximum Number of Visits for Guest ID

Enter the maximum number of visits allowed for a guest.

Number of Days to Track Guest ID Visits

Specify the number of days you wish to track guest visits. This number is set to 365 by default and will track a year's worth of visits, but you may set it to a smaller or larger number to count guest visits over a shorter or longer period of time.

- *Drafting Credit Cards Due to Expire*

If you want an informational warning message to appear on check-in letting a member know that their drafting credit card will soon expire, specify how many days notice you want before the expiration date.

Display A Message for Drafting Credit Cards Expiring In This Many Days

Enter the number of days prior to a drafting credit card expiring that an expiration warning message should start to display during facility access.

- *Facility Check-In*

You can set the system to check member records for the presence of an email address at check-in and ask for one if none is found.

Gather email addresses at check-in

Specify "Yes" or "No". Set this to "Yes" if you would like the system to prompt for missing email address during facility check-in.

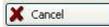
The following two settings allow you to restrict check-in times as they relate to program-only membership types in order to control how much access a program-only member has to your facility.

Allow check-in before program start time

Use this setting to set the earliest time before a program starts that a program attendee can check-in.

Allow check-in after program start time

Use this setting to set the latest time after a program starts that a program attendee can check-in.

8. When you are through making changes, click  to save your changes or  to exit the screen without saving your changes.

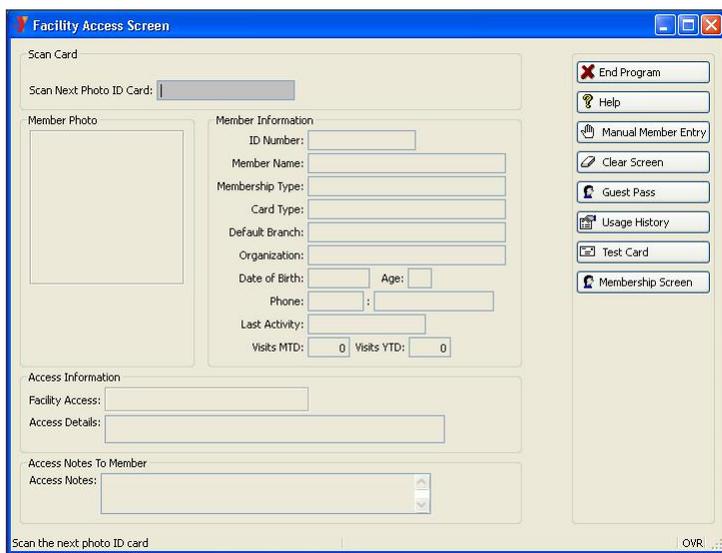
Chapter 3. Facility Access Screen

The "Facility Access Screen" is meant to be run at the front desk of each facility. As members enter a facility, their cards are scanned on this screen for ID verification and access status. Whether a person is entering with a member ID or a guest pass, this screen will display the relevant information and indicate that access is either granted or denied. Additionally, if there is any information that needs to be relayed to the member, it can be displayed here as a reminder.

To run the "Facility Access Screen":

1. From the *ThinSoft* main menu, click - **Membership**.
2. Double-click **Facility Access Screen**.

Figure 3-1. Facility Access



The screenshot shows a software window titled "Facility Access Screen". The interface is divided into several sections:

- Scan Card:** A text input field labeled "Scan Next Photo ID Card:".
- Member Photo:** A large empty rectangular box.
- Member Information:** A collection of input fields for: ID Number, Member Name, Membership Type, Card Type, Default Branch, Organization, Date of Birth, Age, Phone, Last Activity, Visits MTD (with a "0" in the input), and Visits YTD (with a "0" in the input).
- Access Information:** Input fields for Facility Access and Access Details.
- Access Notes To Member:** A text area for Access Notes.
- Right-hand Panel:** A vertical stack of buttons: End Program (with a red X icon), Help (with a lightbulb icon), Manual Member Entry (with a person icon), Clear Screen (with a trash can icon), Guest Pass (with a person icon), Usage History (with a document icon), Test Card (with a card icon), and Membership Screen (with a person icon).

At the bottom left, there is a status bar that says "Scan the next photo ID card". At the bottom right, there is a small icon labeled "OVR".

Notice there is a **Membership Screen** action button available. If the current user has permission to access member records, this button can be used to access that data. Clicking it when there is member data on the "Facility Access" screen will bring up the relevant member record. If you click this button when there is no member data currently on the screen, it will bring up a blank member record.

The "Facility Access" screen may be left running throughout the day at the front desk so it's available immediately when members enter.

NOTE: Do be aware that this screen displays confidential information and always use the **Clear Screen** button to clear the information from the last scanned card.

Testing the Facility Access Screen

A **Test Card** button is provided on the "Facility Access Screen" so that you may test a card to make sure the card is good and the scanner is functioning properly. Clicking the **Test Card** button assures that the system will not record any admittance into the facility for that test.

Simply click **Test Card** and then scan a membership card. If the card appears to be invalid, it's likely that either the card is bad or your scanner may be malfunctioning. In that case, you should try hand-keying in the test card ID number to verify that the problem is indeed with the scanner. For security reasons, card ID numbers will not display in the text field, so always be careful when hand-keying card ID numbers.

Member Access

Members should use their member ID cards to gain access to the facilities. If they need access but don't have their card for some reason, a state issued ID card should be presented and the  Manual Entry button can be used to look up the member's information to determine if access is allowed. Some organizations have policies about only allowing a certain number of manual entries before the member is denied access and told to replace his or her card, so it's best to only use the manual entry feature when absolutely necessary.

To use the "Facility Access Screen" to admit members:

1. Scan membership ID cards as people enter the facility. For security reasons, the card ID number will not display in a readable format in the **Scan Next Photo ID Card** field.

If a member does not have his or her card, you may still be able to allow entry depending on your branch policies.

Some organizations do not allow access without a valid membership card, and some have policies about only allowing a certain number of manual entries before the member is denied access and told to replace his or her card, so it's best to only use the manual entry feature when absolutely necessary. Once a member has exceeded any manual entry limits, he or she will need to get a new card before any further facility access will be granted.

To manually enter a member's information in the "Facility Access Screen":

A. Ask for another form of ID and click  to look up that member's information in the system.

B. Enter the member's last and first name. If you have the complete name, click on  icon.

Alternatively, you can enter the last name and partial first name, and click on the  icon.

Figure 3-2. Manual Member Lookup



C. From the list that is displayed, highlight the correct name, then double-click on that name or click  icon on the right.

You may have to ask for additional information, such as date of birth or address, to determine the correct member from the list.

Figure 3-3. Manual Member Lookup with List

ID Number	Last Name	First Name	Birth Date	Type	GP	Join Date	Cancel Date	Status	Address
16-22030-01	Johnson	Aaron				09/16/1996		Active	2658 Edge
16-22934-01	Johnson	Aaron	01/22/1991	YOUTH		04/03/2000	06/17/2001	Canceled	2658 Edge
12-54531-02	Johnson	Adam	06/29/1957	FAMILY		03/21/2002	01/30/2003	Canceled	1742 Lowl
14-31920-01	Johnson	Albert						Active	1105 Dog
12-47981-02	Johnson	Alethia	10/12/1982	FAMILY		02/13/2006		Expired	240 Maud
12-35166-01	Johnson	Alice	01/17/1963	ADULT		07/31/1997	08/01/2000	Canceled	3183 Bott
12-35586-02	Johnson	Alisha	04/01/1953	FAMILY		11/08/1994	02/02/2003	Canceled	4583 Thon
12-40332-01	Johnson	Allison						Active	4780 Hard
12-49229-02	Johnson	Althea	06/25/1965	FAMILY		01/16/2000	03/25/2001	Canceled	871 Warne

D. With the correct member selected from the list, you will be returned to the Facility Access Screen where the access information will be displayed. Proceed with the instructions below.

- Once the card is scanned or the member information has been entered manually, the rest of this screen fills out with all the relevant information for this member.

If the ThinSoft behavior setting for facility access check-in is set to check for an email address on record when members check in, and the member does not have an email address in the system, you will be prompted to ask the member for an email address. For more information on this behavioral setting, see the *ThinSoft Behavioral Settings* manual.

If there is a *Member Photo* on file, it will display. Checking the member photo for visual identification is a good way to ensure that the person attempting to access the facilities isn't trying to do so using someone else's membership ID card.

If there is no member photo in the system, you may want to ask the person for his or her name, birth date or phone number to check it against the information displayed.

If the member receives financial assistance, a smile icon will display on the screen with the rest of the member's information.

- Facility Access** will display as "GRANTED" or "DENIED".
 - If the member has no outstanding issues, "GRANTED" will display on the screen indicating the member can be granted access to the facility.
 - However if "DENIED" is displayed on the screen, the member account has an outstanding issue that should be resolved before entry. Usually the reason for the denial is also displayed on the screen in the **Access Details** field. Often the issue is an address change, an expired membership, a bank account or bank draft issue.

When access is denied, please take this member aside to resolve the issue. Be aware that if other members are waiting, the reason for the denial may be personal so be sure to treat their information with respect. If you cannot resolve at this time, give them a business card from the Membership Department. The member can take action to renew their membership or pay the returned bank draft to allow entry at that time.

A member with a suspended draft will be denied access until the draft is set to resume.

4. If there have been any notes left in the system to be relayed to the member upon accessing a facility, they will be displayed in the **Access Notes** field. If there is anything displayed there, let the member know what it says.
5. If, for any reason, you or the member need to know more about the member's facility use history, click the **Usage History** button. This will bring up the report options window for the "Print Member Usage Report". Specify the **Report Destination** and **Number of Copies**, then click  to run the report.

Figure 3-4. Member Usage Report

Date: 09/26/2006 Member Usage Report Page: 1
 Time: 15:24:55 YMCA of Greater City Area
 For The Period Of 09/01/2005 Through 09/01/2006

Member ID: 50-30552-01
 Member Name: Mike Robinson
 Membership Type: 110 - Max Family

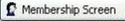
Activity Date and Time	Location
11/18/2005 12:29	01 - Corporate
04/19/2006 13:43	01 - Corporate
06/28/2006 14:23	01 - Corporate
07/28/2006 07:55	01 - Corporate
07/28/2006 07:59 (Access Denied)	01 - Corporate
07/28/2006 08:07	01 - Corporate
07/28/2006 09:08	01 - Corporate
07/28/2006 09:30	01 - Corporate
07/28/2006 13:07	01 - Corporate
07/29/2006 13:15	01 - Corporate
07/29/2006 13:24	01 - Corporate
07/29/2006 13:30	01 - Corporate
08/01/2006 14:28	01 - Corporate
08/31/2006 18:26	01 - Corporate

Total number of entries in date range: 14

6. The information on the "Facility Access Screen" will eventually time out and clear itself, but it's still a good idea to be in the habit of clicking **Clear Screen** when finished with a member's confidential information, especially if you're not going to immediately scan another card.

Guest Passes

Guest passes can be issued to non-members granting a limited amount of facility access. Because of the limitations of guest passes and the need to collect a little statistical data concerning their use, there is a separate screen for admitting people with a guest pass which is accessible from the main "Facility Access Screen".

Note that the  button is available on the "Guest Pass Entry" screen, allowing easy access to the "Membership Information" screen should it be necessary.

To admit people with guest passes:

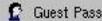
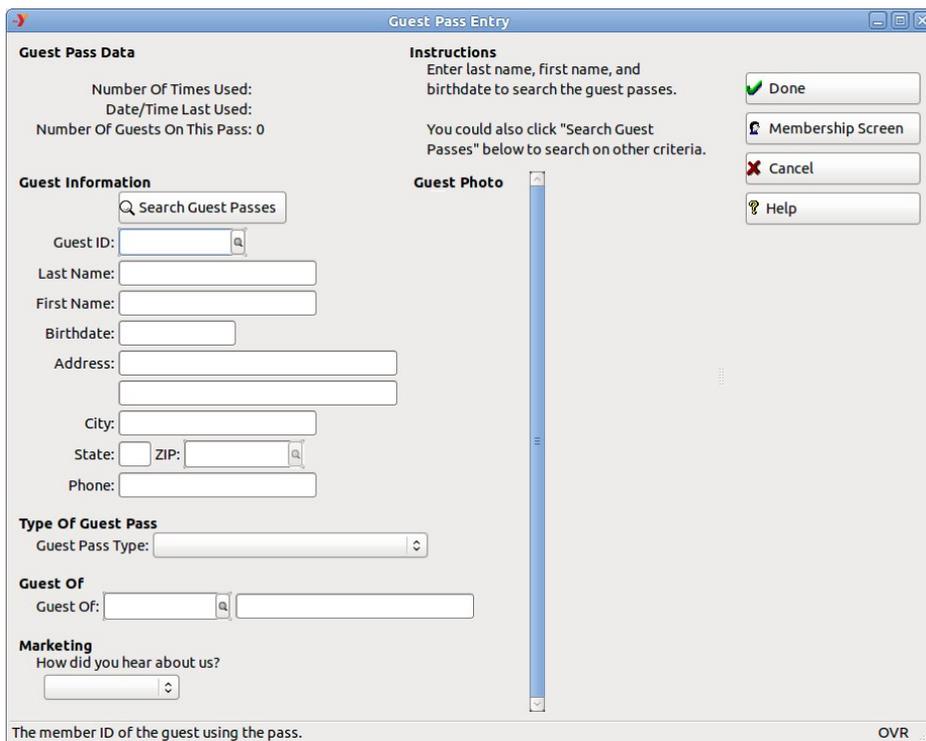
1. From the "Facility Access Screen, click .

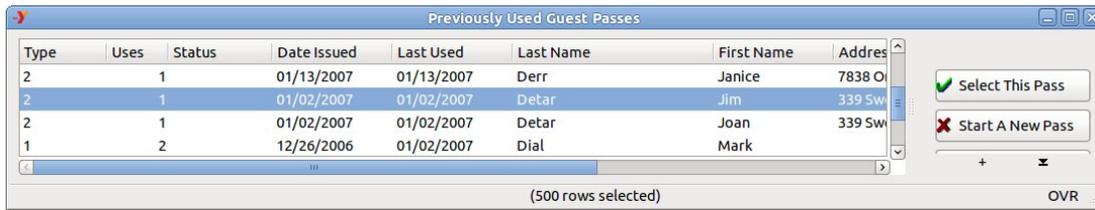
Figure 3-5. Guest Pass Entry



2. Enter the guest's **Last Name**, **First Name** and **Birthdate** and click  to search right from this screen, or click **Search Guest Passes** to perform your search.

If records matching your search criteria were found, a list of "Previously Used Guest Passes" will appear.

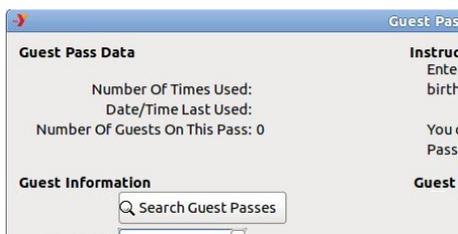
Figure 3-6. Previously Used Guest Passes



Type	Uses	Status	Date Issued	Last Used	Last Name	First Name	Address
2	1		01/13/2007	01/13/2007	Derr	Janice	7838 O
2	1		01/02/2007	01/02/2007	Detar	Jim	339 Sw
2	1		01/02/2007	01/02/2007	Detar	Joan	339 Sw
1	2		12/26/2006	01/02/2007	Dial	Mark	

When you've located the guest pass record, click it to select and highlight it, then click **Select This Pass** and the "Guest Pass Entry" screen will fill in with this guest's data. The program will track this usage system wide, and the usage history for this guest pass will be displayed in the *Guest Pass Data* area at the top of the screen.

Figure 3-7. Guest Pass Data



Click the  icon and admit the guest if he is still within the allowed uses limit. If the allowed visits on this guest pass have all been used, an error message will be displayed. (Guest Pass Policy varies with each branch.)

Figure 3-8. Guest Pass Has Been Used Up



If you did not find the guest pass, you may click, "Start A New Pass" on the "Previously Used Guest Passes" screen. You will be returned to the "Guest Pass Entry" screen where you may either start a new search, or enter information for this new guest as explained in the next step.

3. If the guest is not found, enter the guest's data.

Make sure to specify the **Guest Pass Type** from the list of available options.

If this person is a guest of a specific member, enter the appropriate member ID in the **Guest Of** field, using  to look up that member ID if needed.

Also make sure to ask **How did you hear about us?** and select the closest matching reason from the list of available options.

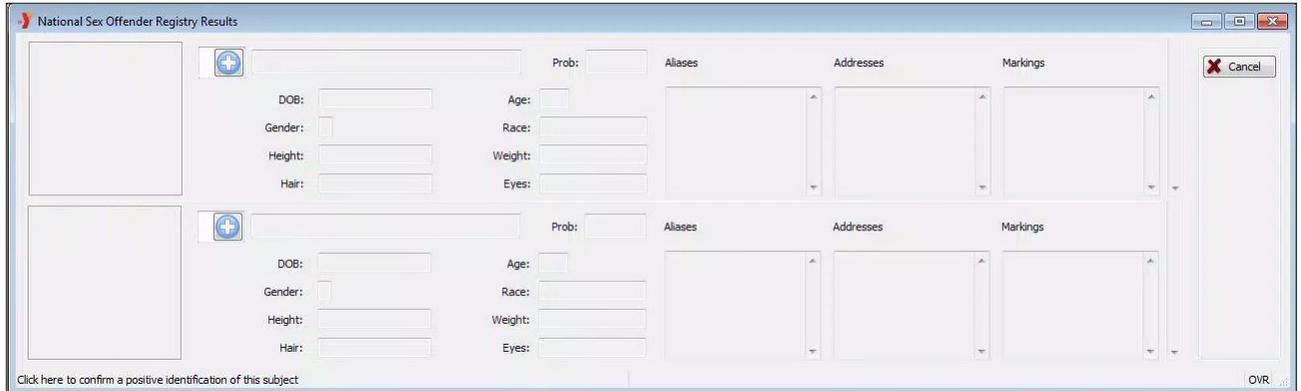
4. Click  and, if you have *ThinSoft* configured to do so, it will search the national sex offender registry for any potential matches.

Figure 3-9. Checking the National Sex Offender Registry...



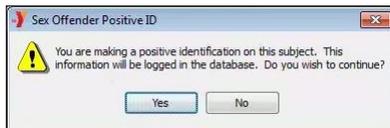
If any potential matches are found, you will be prompted with the data from the registry to compare to the member data you are entering.

Figure 3-10. National Sex Offender Registry Results



To indicate a positive match, click the + icon to the right of the photo. Marking a match as positive implicates that you will not be adding that person as a member.

Figure 3-11. National Sex Offender Registry Match



It is up to your organization to set policy as far as how to respond to likely matches.

If no likely matches are found on the national sex offender registry, you will be taken back to the "Facility Access Screen" where the guest will be granted or denied access based on the validity of the guest pass as determined from the information just entered.

5. As always, when done admitting this person, use the **Clear Screen** button to clear confidential information from the screen.

Chapter 4. Membership Reports

View Facility Access

Here you can view all granted access records for both members and guests combined and, if necessary, as in the case of a power outage, manually enter past facility access data.

To View Facility Access:

1. From the *ThinSoft* main menu, click - **Membership**.
2. Click - **Reports**.
3. Double-click **View Facility Access**.
4. Enter the **Start Date/Time** and **End Date/Time** defining the range of time you want to view.
5. Narrow your results by specifying a particular **Branch**, or leave that field blank to include all branches.
6. Click

Figure 4-1. View Facility Access, Member and Guest

Name	Date/Time	Member Type	Member ID	Branch	Method
Stroud, Leona J.	2014-01-03 08:02	SilverSneakers	02-00940-01	02	Scan
Cole, Dustin S.	2014-01-03 08:04	Household	02-01111-01	02	Scan
Perry, David P.	2014-01-03 08:06	Household	02-01020-01	02	Scan
Lenieux, Virgil R.	2014-01-03 08:06	Adult	02-02155-01	02	Scan
Lenieux, Virgil R.	2014-01-03 08:07	Adult	02-02155-01	02	Scan
Gilbert, Barbara J.	2014-01-03 08:09	SilverSneakers	04-11826-01	02	Scan
Brown, Jimmy J.	2014-01-03 08:13	Household Select	02-00957-01	02	Scan
Rinehart, Sidney E.	2014-01-03 08:13	SilverSneakerHFD	02-01204-01	02	Scan
Corcoran, Wallace E.	2014-01-03 08:16	Household	02-01295-03	02	Scan
Navarro, Bennie A.	2014-01-03 08:16	Adult	02-01328-01	02	Scan
Sangster, Steven L.	2014-01-03 08:17	SilverSneakerHFD	02-02380-01	02	Scan
Johnson, Paulette A.	2014-01-03 08:20	Student	02-00306-01	02	Scan
Palmer, Edward D.	2014-01-03 08:20	Household	04-10146-05	02	Scan

From this screen, you can display new data just by clicking the **Change Date** button, and specifying new search criteria. You can also click on a member and then the to access that member's record on the "Membership Information" screen.

If you need to record past access data, as in the case of a power or system outage, you can use the button to access the "Update Facility Access Data" screen.

Figure 4-2. Update Facility Access Data

Update Facility Access Data

File

Add Update Delete Quit

Member ID:

Member Name:

Date/Time:

Location:

Branch: 01 - Branch 01

Entry Method: Admin

Approved:

Deny Reason:

Male Count:

Female Count:

OK

Cancel

Add Notes

Help

Add: [F12] to Store, [ESC] to Cancel -- Enter changes into form OVR

Here you can enter all of the data that would have been recorded with a scanned access. The **Entry Method** for access data entered in this manner will be set to "Admin" and access data of this method type can be edited at a later time if needed. Facility access records of entry types "Scan" and "Manual" may never be edited.'