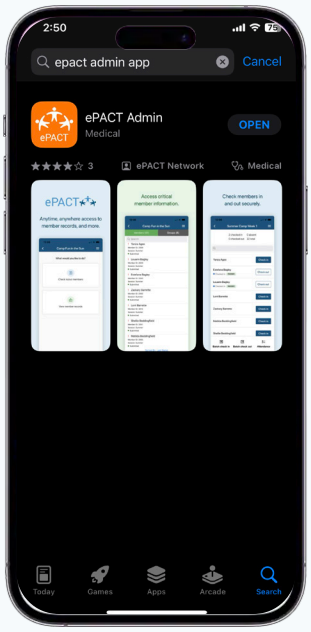
ePACT

Have questions?
Contact us
help@epactnetwork.com

Admin App Guide for **IOS Devices**
+ CICO (Check in -Check out)

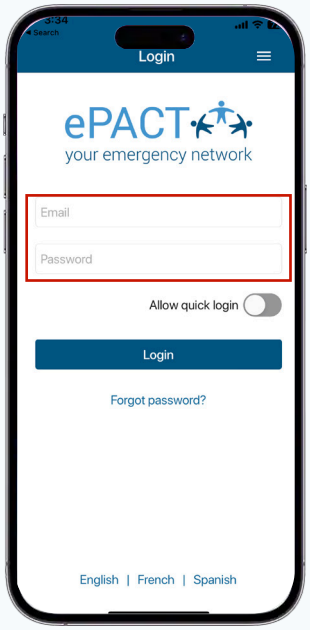
Getting started with Login.

1.



Begin by installing the ePACT Admin app from the **Apple Store.**

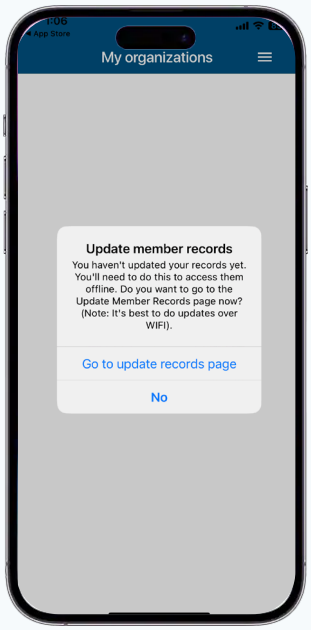
2.



Once installed, open the app and **login** with your **email** and **password.**

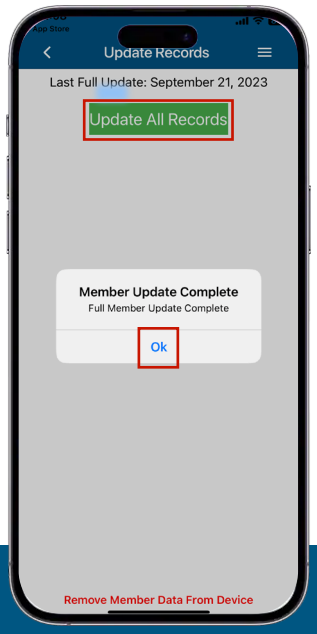
Updating Members.

3.



If you have not yet synced or it has been **7 Days** since you last synced the member records on the dashboard with the app you will be prompted with the option to do so. You can also **manually update** the member records via **List Ic** in the top right corner, **Update member records.**

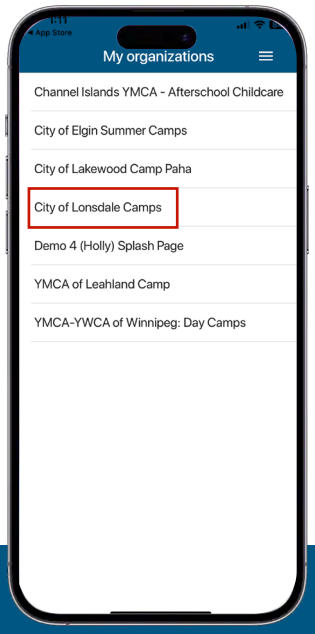
4.



Select **Update All Records** and **Tap Ok** when complete.

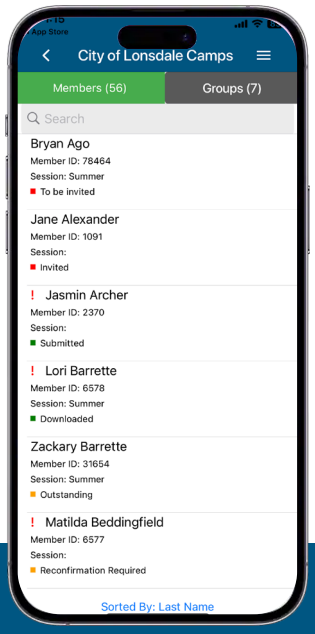
Selecting ORG.

5.



Press the **back** butto < in the **top left corner** to go back to the **My Organizations page.**

6.



By pressing on the **organization name** , you will be brought to the member records page.

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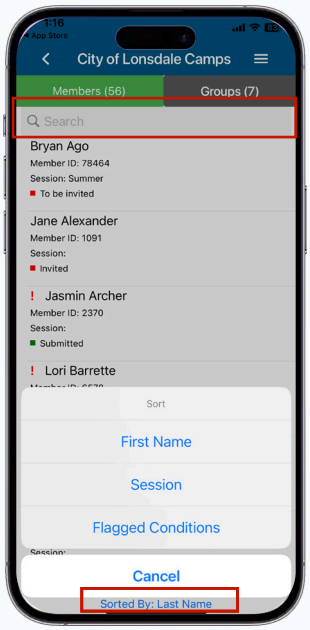
All good so far?..

If something isn't right
Contact us at:
help@epactnetwork.com

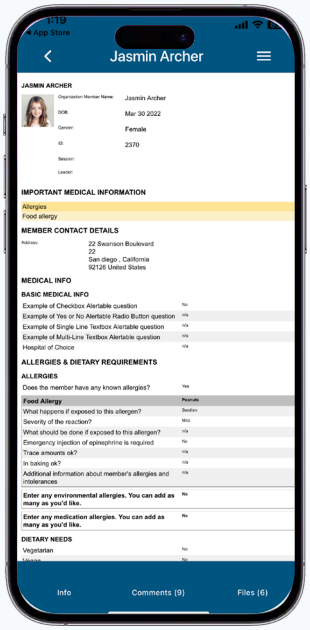
7.

Viewing Members & Groups.



By default, **records** are sorted by **last name.** The sort can be changed via the **Sorted By button** at the **bottom** of the screen. The **Search function** at the top of the screen can also be used to search for **a member** by either **first or last name only.** Members need to have a **Submitted, Downloaded,** or **Reconfirmation Required status** to be viewed.

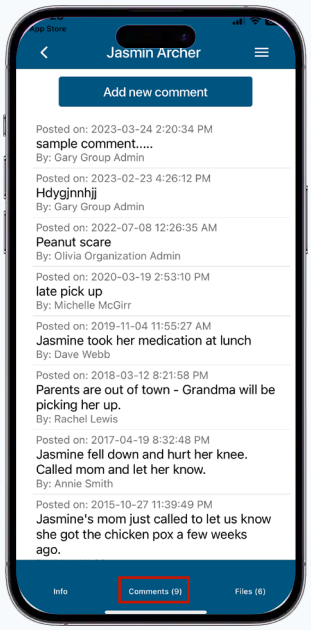
8.



Choose a record to **view** the **member's emergency information.**

9.

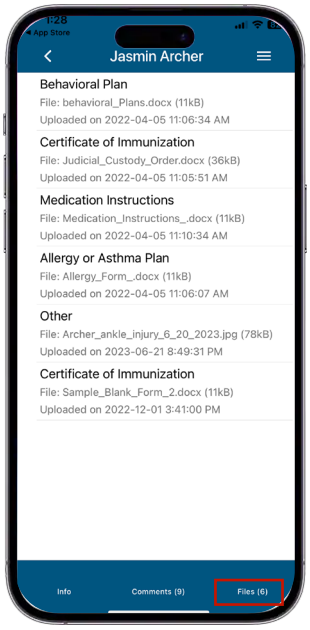
Viewing Comments.



Press the **Comments** tab to **view** or **add comments.** This feature is **only** available while **online.**

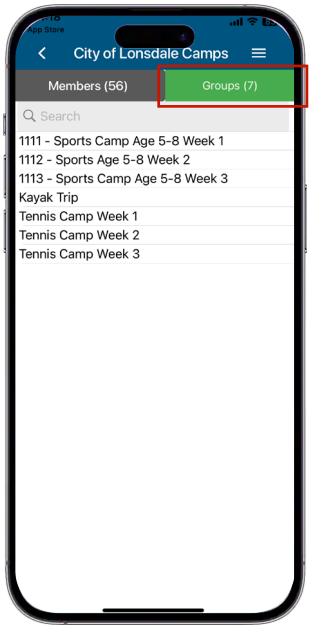
10.

Viewing Files.



Press the **File(s) tab** to **view** or **add** files. This feature is **only available while online** and requires the appropriate app to view the file.

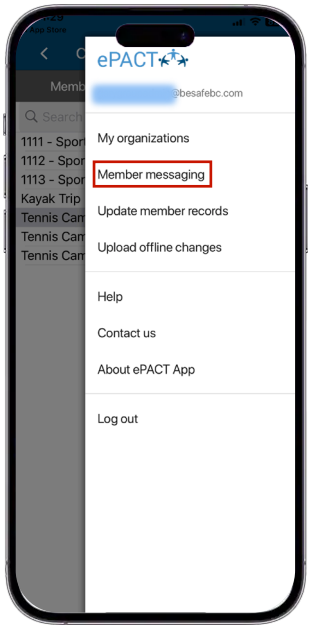
11



Groups can be viewed via the **Groups tab.** The Search function at the top of the screen can be used to search for **a specific group.**

12.

Member Messaging.



To message the **group** press on the **list icon** to bring up the **Member Messaging** feature.

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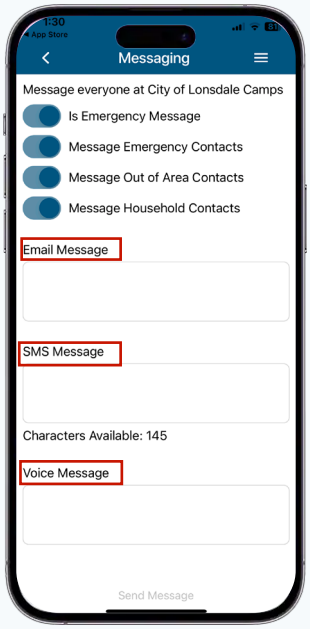
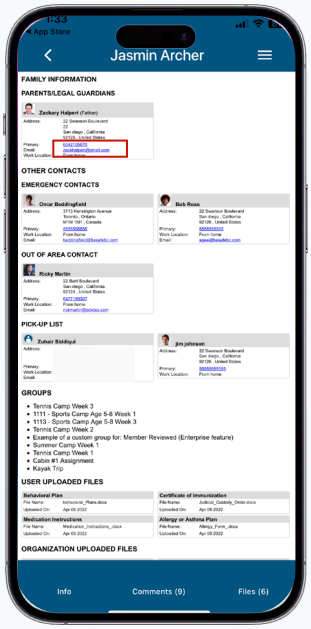
13.



A message can be **sent to a specific or an individual** member. **Please note:** If under the **Group tab** a mess-age can be sent to **a specific group**. A message **can-not** be sent to multiple members under the Members tab or multiple groups under the Groups tab. Messages can be sent using **any combination** of the **three meth-ods.** It is also possible to include emergency and household contacts as well as **set the title of the message** to **EMERGENCY MESSAGE.**

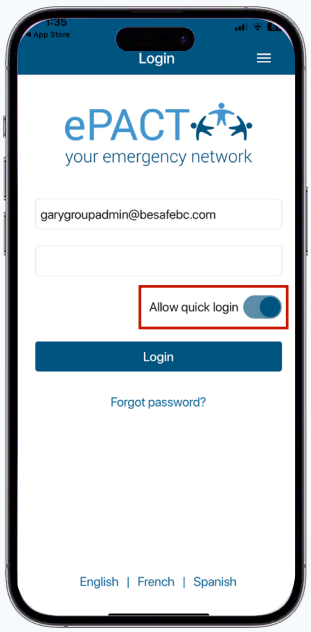
14.



To send a message or contact an indi-vidual member, press either the **phone number** or **email address** within the patron's profile.

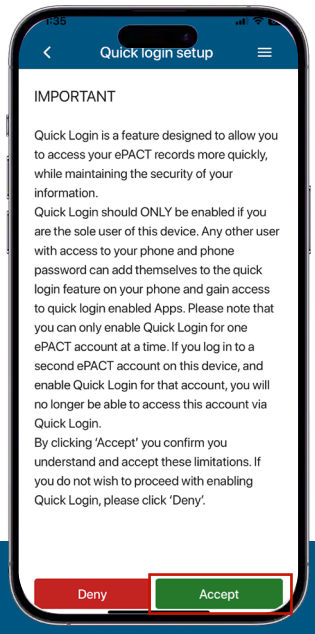
Quick Login.

15.



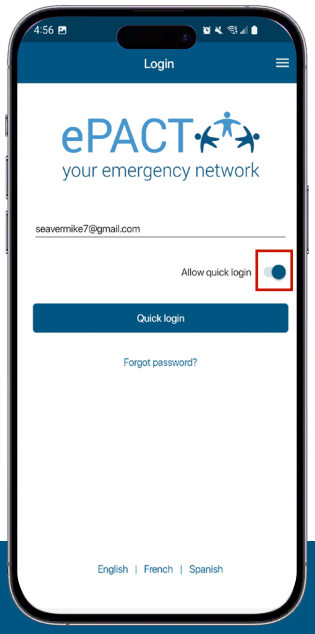
The **Quick login** feature will allow you to login to the ePACT Admin app using the pattern used to login to your mobile device. To enable this feat-ure, **enter** your **username and password** and then turn on the Quick login feature **before logging in.**

16.



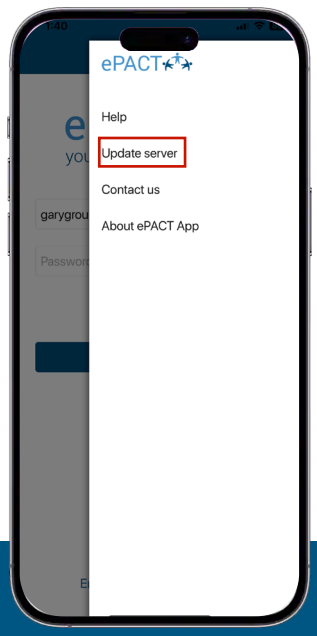
Accept the notice and **confirm** your unlock pattern when prompted. **Please note** that this feature is **not recommended on shared devices** where **different admin accounts** will be used to login.

17.



The next time you go to login, the **Allow quick login** feature will be turned on and you will be prompted for your **unlock pat-tern** before logging in.

18.



The **List Icon** in the **top right corner** of the login page presents the options for **Help, Update server, Contact us,** and **About ePACT App.**

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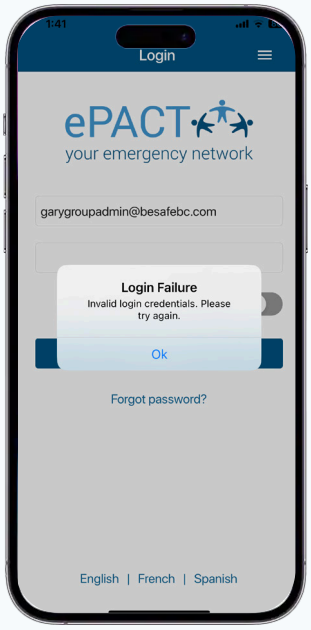
19.

Selecting Servers.

The **Select server** option is used to **choose the server your organization resides on**.

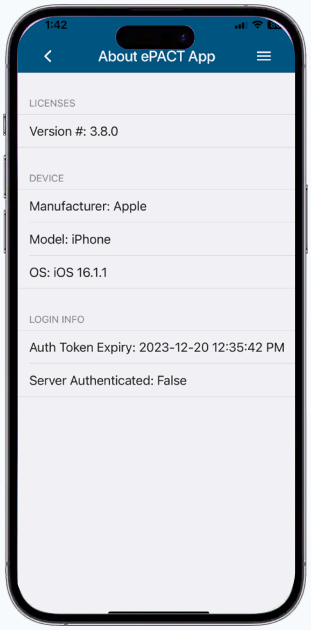
20.



A **"Login Failure"** message when trying to login, means perhaps you are on the wrong server. Try switching to the other server and the message should go away.

21.

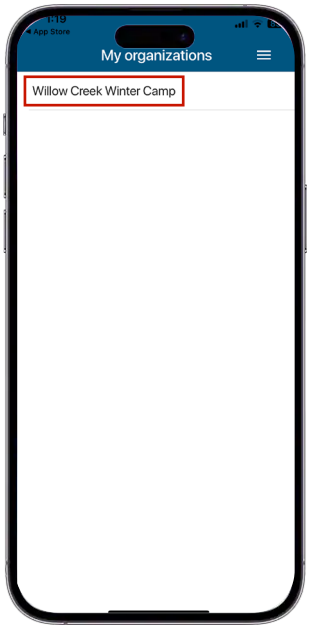
Identifying App Version.



The **About ePACT App** is used to identify the **app version** as well as details about your device. It will be helpful to relay this information to ePACT Support if experiencing **problems with the app.**

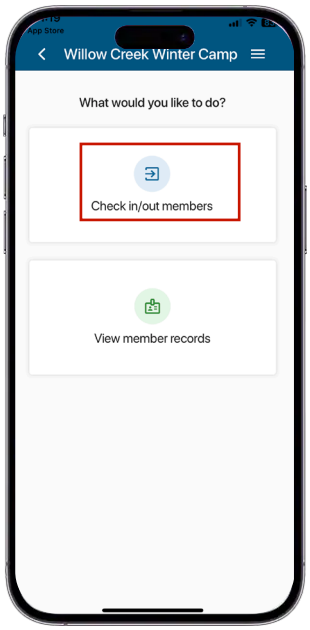
The ePACT Admin app for IOS, Check In Check Out (CICO)

1.



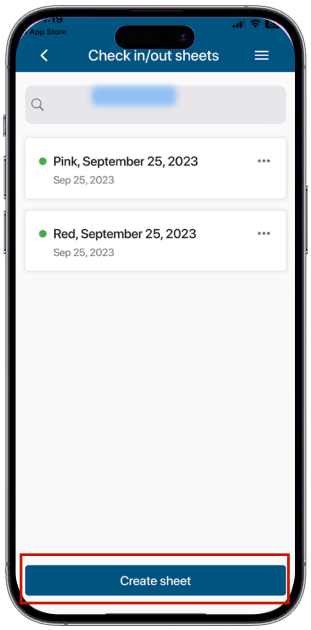
Starting from the **My Organizations page**, press the **organization name** to Check in/out members.

2.



Press **Check in/out members.**

3.



If there are **existing CICO sheets** presented, press the **Create sheet** button located at the **bottom of the screen.**

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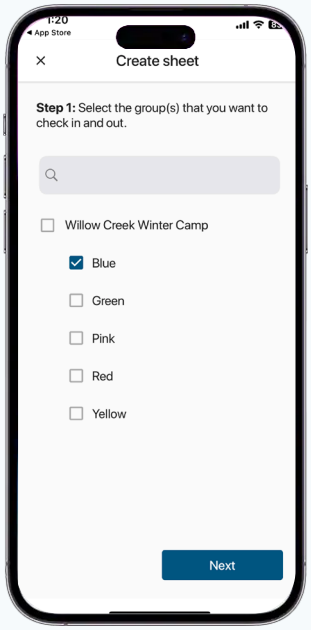
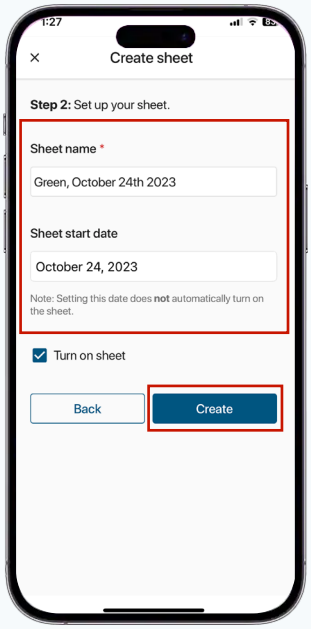
4.



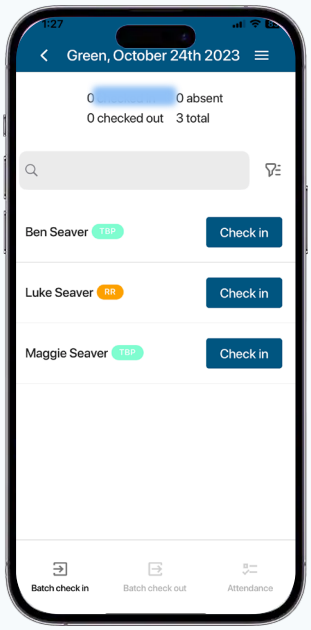
If you **do not** have any **CICO sheets created,** you will **automatically** be presented with the task of creating a sheet. The sheet is based off **one or more groups** in the dashboard. If you have many groups, the search box can be used to filter by **group name.** Select **a group** or groups and press **Next.**

5.



Name your sheet something that will make sense when compared to the group name. It may be helpful to **include the date the sheet was created** in the name. The sheet's start date can be entered but it is not necessary. **Turn on the sheet** via the **check box** and press **Create.**

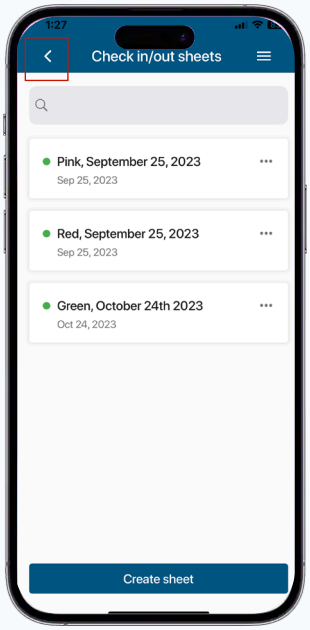
6.



At this point you will be **able to check in members.**

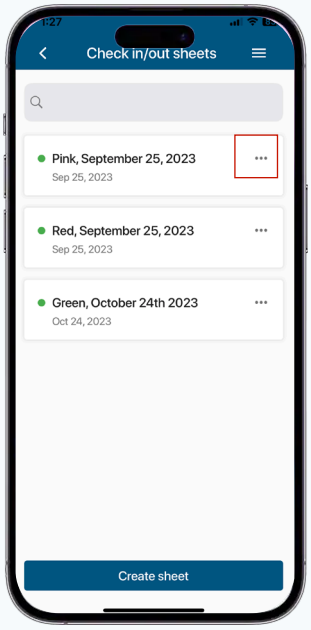
Managing CICO Sheets

7.



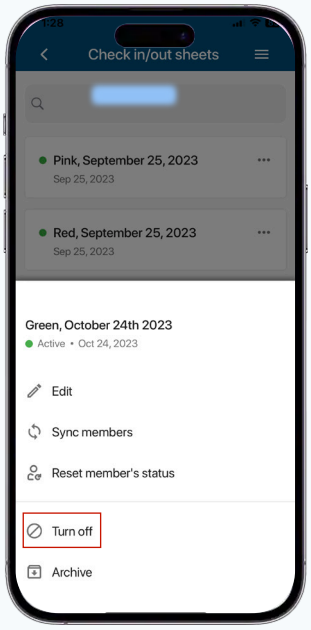
You can also hit the **back button** (left facing arrow) in the top left corner of the screen to go **back to the menu** to create **more sheets.**

8.



The **Check in/out sheets page** lets you manage your **CICO sheets.** A sheet **must be turned on**, as indicated by a **solid green** button, **before** you can check in or check out members. To turn a sheet on or off, **click the sheet's three dots** button to the **right of the sheet.**

9.



Select either the **Turn on or Turn off** option.

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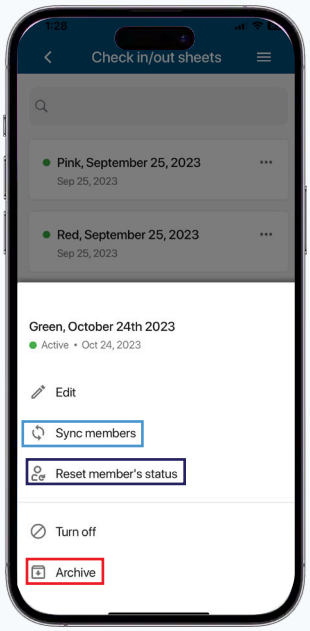
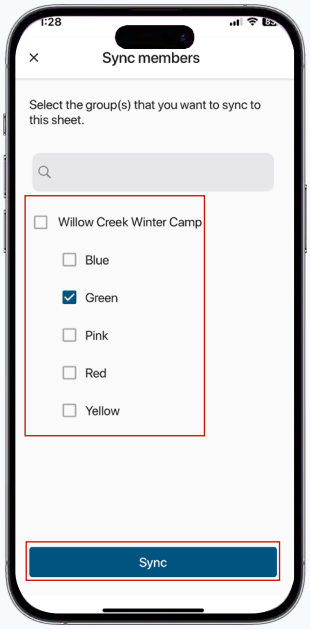
10.



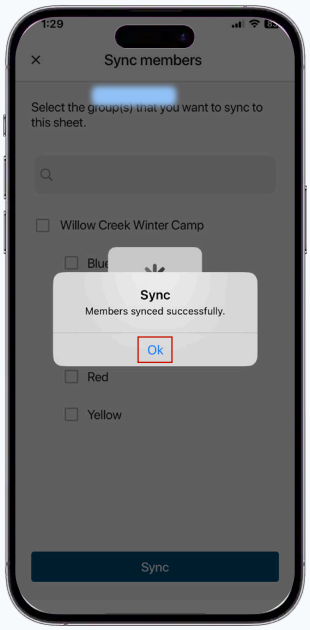
The **three dots menu** presents a host of **other options pertaining to the sheet.** The **Sync members** option is used to **sync (update) the selected sheet with members of a certain group or groups in the dashboard.** The **Reset member's status** is used to **reset any or all currently checked out or absent members back to the check in stage,** while the **Archive option** lets you **upload** the sheet to the **dashboard** and **remove it from your device.**

11.



When the **Sync members** option is **selected** a menu is presented with the group in which **to sync the members.** Ensure the **correct group** or **groups** are selected **press Sync.**

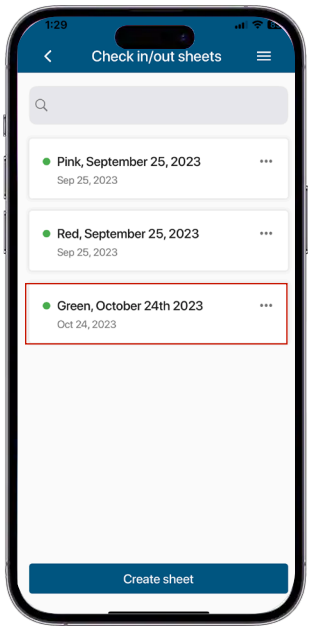
12.



A **"Members synced successfully"** window should appear. **Press Ok** to return to the **Check in/out sheets menu.** Please note that it is **best** to sync members **using a Wi-Fi connection.**

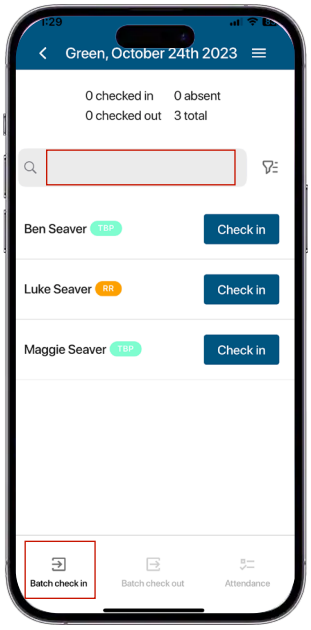
13.

Checking members in or out



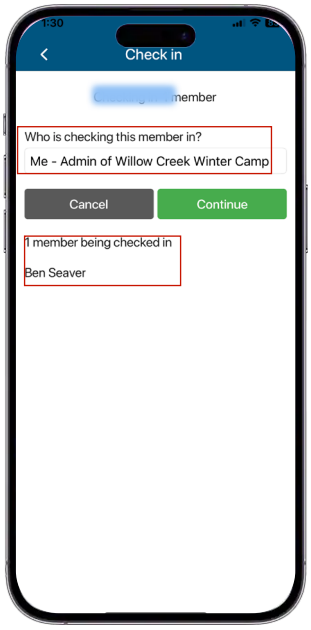
From the **Check in/out sheets page,** select the sheet for which you will check members **in or out.** In this example, the **Green group is used.**

14.



Members are presented in **alphabetical order.** If there are many members, the search box to the **right of the magnifying glass can be used to filter by either first or last name.** Members can be **checked in one at a time** using the **blue Check in button** or in **multiples** using the **Batch check in button** in the bottom left of the screen.

15.



In this example, **Ben Seaver** is checked in using the **blue Check in button.** The resulting screen **confirms** that one member will be **checking in and presents the option to select who is checking that member in.**

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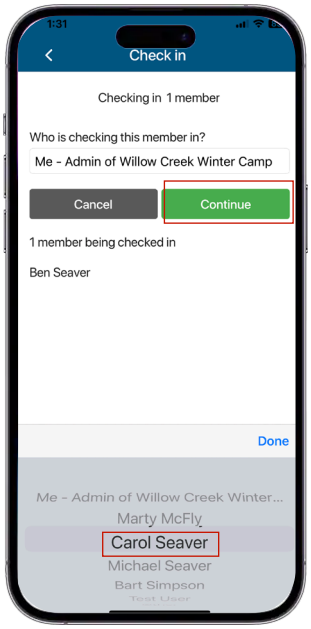
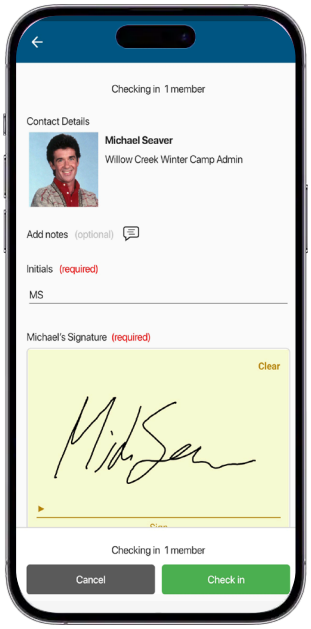
16.



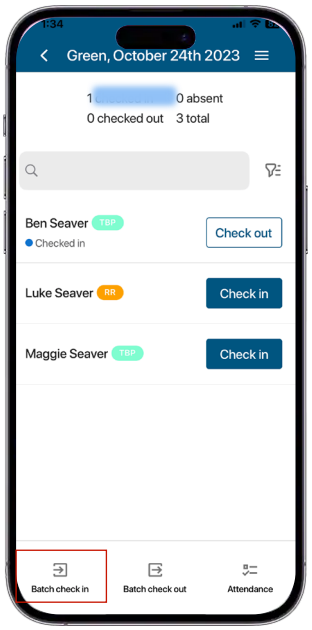
Press the **area under the question "Who is checking this member in?"**, select the according person, and press the **green Continue button**. Parents, legal guardians, emergency, and pickup contacts can be selected. The default value of **"Me – Admin of current dashboard" can also be used as well.**

17.



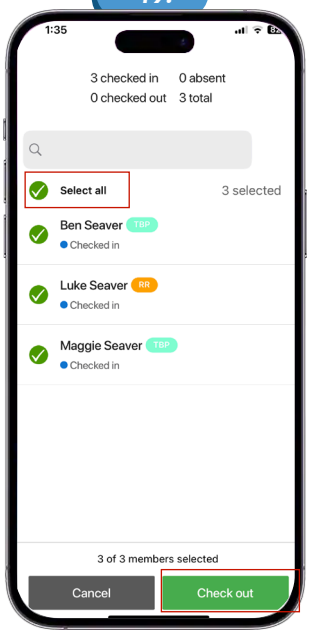
If the option to require initials and/or a signature during the check in process **has been turned on via the dashboard settings**, complete these fields and **press** the green **Check in button in the bottom right corner** to complete the check in process and return to the **check in check out sheet.** If these fields are not present, **simply press the green Check in button**.

18.



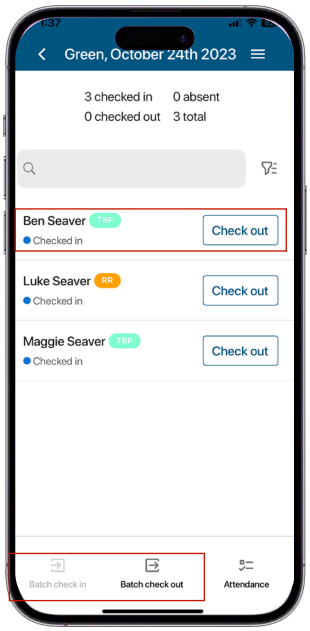
To check in **multiple members at once,** press the **Batch check in button** in the **bottom left corner** of the screen.

19.



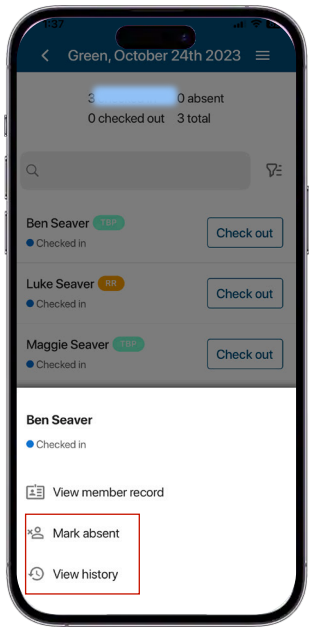
Press the **Select all** button or press the members you **would like to check in** and then **press the green Check in button** in the **bottom right corner.** As in the previous steps, select the according check in person, followed by the **green Check in button** to complete the process and **return to the check in check out sheet.**

20.



The **check out process** is like the check in process and begins by **selecting the sheet for which you will check members out of.** Members can be checked out **individually** or in **batches** and can **require initials and/or signatures.** Absent, History and Attendance Check

21.



Within the CICO sheet, **click the member's name** to bring up a **menu** containing the options to **view the member's record**, mark the member as **absent, or view the member's history.** Press **Mark absent** to mark a member as absent.

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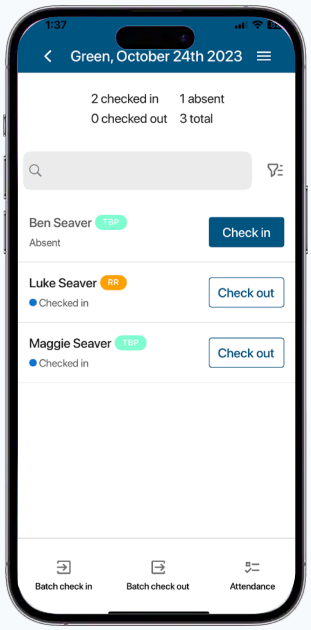
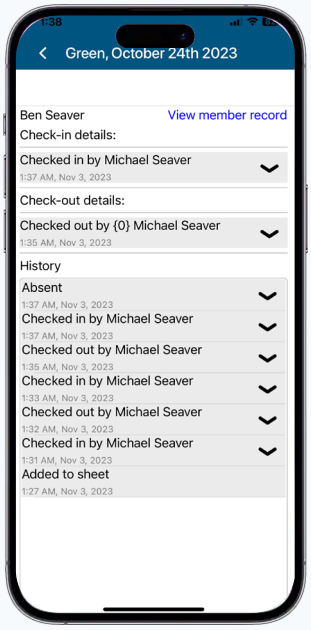
22.



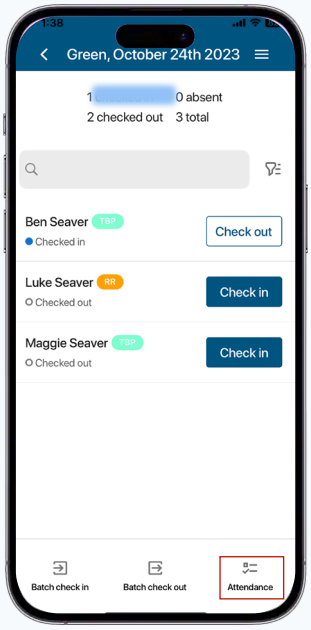
A **screen refresh may be required** if the Absent sub text **doesn't appear** under the member's name. **Notes explaining absenteeism will only be required** if the member has **already been checked in** and then **marked absent** as this will change the status to **checked out.**

23.



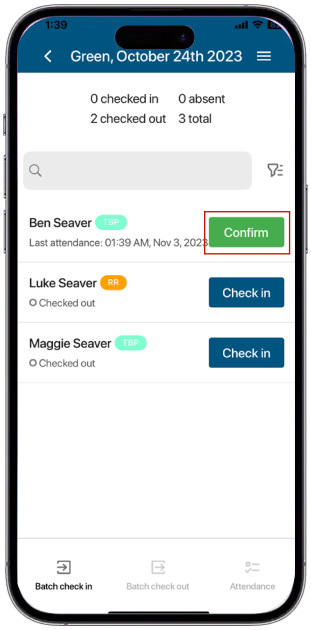
The **View history** option will let you **view the current check in check out details** of the member as well as their **check in check out history.** You can also **view the member record** from the screen or the **screen prior.**

24.



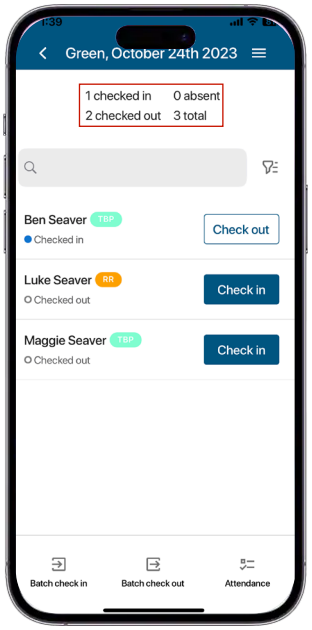
Once any number of members **have been checked in,** the **Attendance button** in the bottom **right corner** becomes **active.** Press this button to **take attendance.**

25.



Click the **green** Confirm button once you have confirmed the **child is in attendance.**

26.



View the **count summary** at the top of the page to see the latest **changes reflected.**

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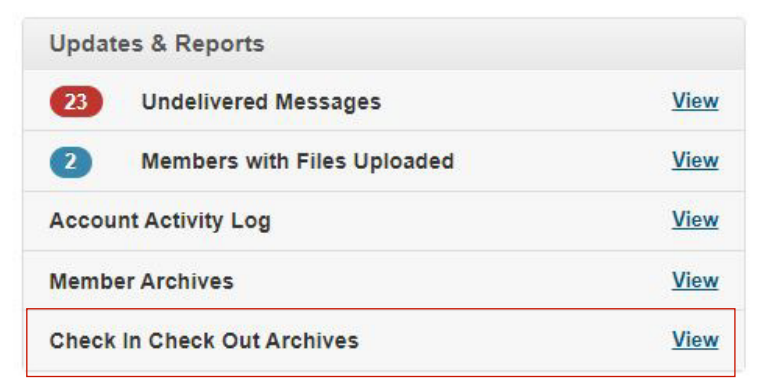
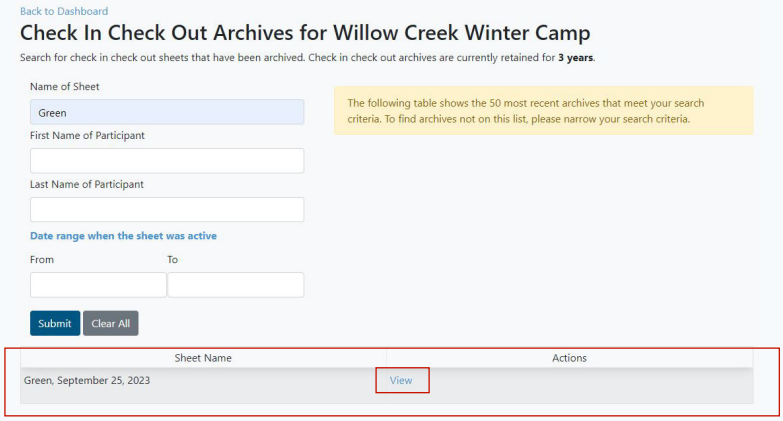
Check In Check Out Sheets on the Dashboard

A.



Check In Check Out Archives **are available on the dashboard via Updates & Reports table.** Please note that **only organizational administrators can access this feature.**

B.

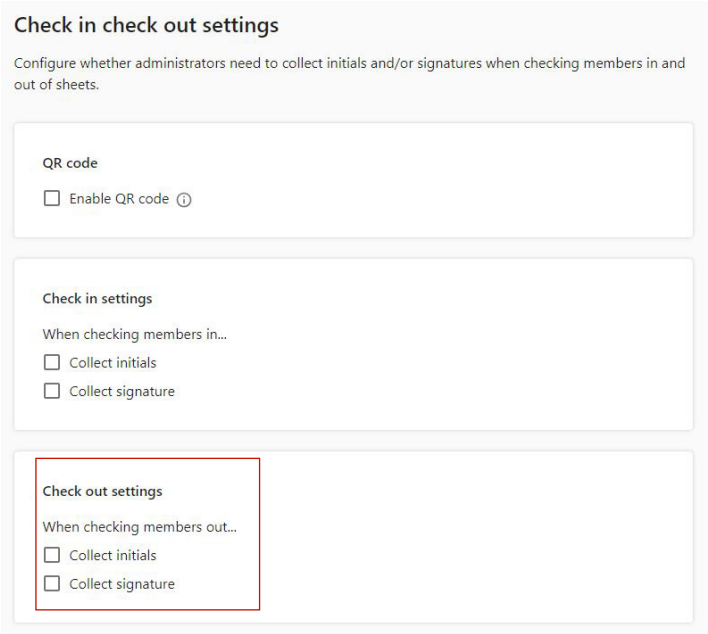


Various **filter options** can be used to **search for the information you are looking for.** In this example the group name **"Green"** is used with the results presented at the **bottom of the screen.**

C.

If the results are viewed, the option to **export the information** in either a **PDF or CSV** format is presented. The **PDF format is required to view signatures.**

D.



As mentioned in **Step 17,** the option to **require initials and/or a signature may be turned on.** These features, as well as others, are maintained under the **Check In Check Out menu accessed via the settings** wheel in the **top right corner of the dashboard.**

And that's it!

You've now learned the basics on how to login to our ePACT admin App & CICO.

Thank you for choosing ePACT!