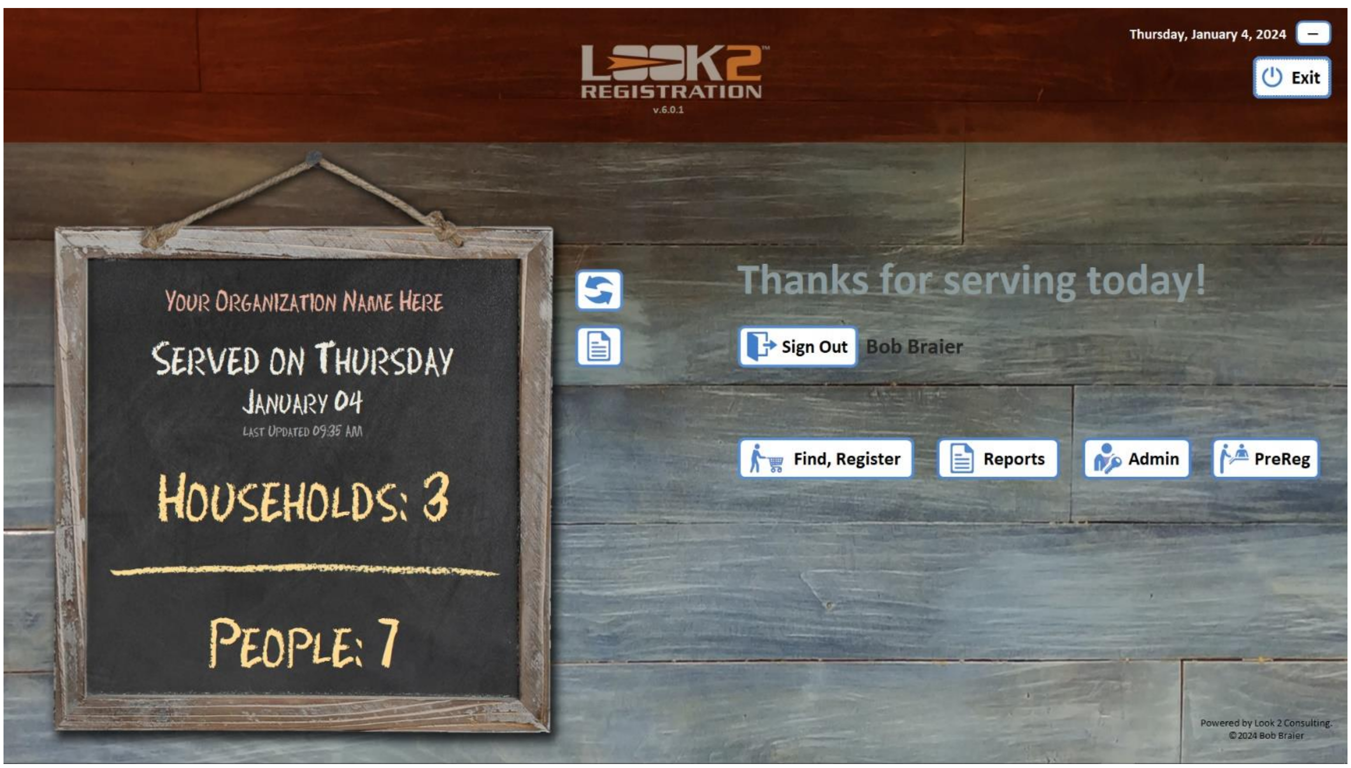
Look2 Registration Software

v6.3.4

Manual



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1. Overview

The Look2 Registration Software allows you to register people using your organization's services, storing their household information and tracking their visit history in a Microsoft database. The system also generates many types of reports of pantry usage, as well as generating a list of primary contacts.

Throughout this document, we'll use the term "Patron" to refer to the people whom you serve (referred to by some pantries as "Guest" or "Client") and will use the term "Registrar" to refer to the person who works at the Registration Desk to update their information into the system.

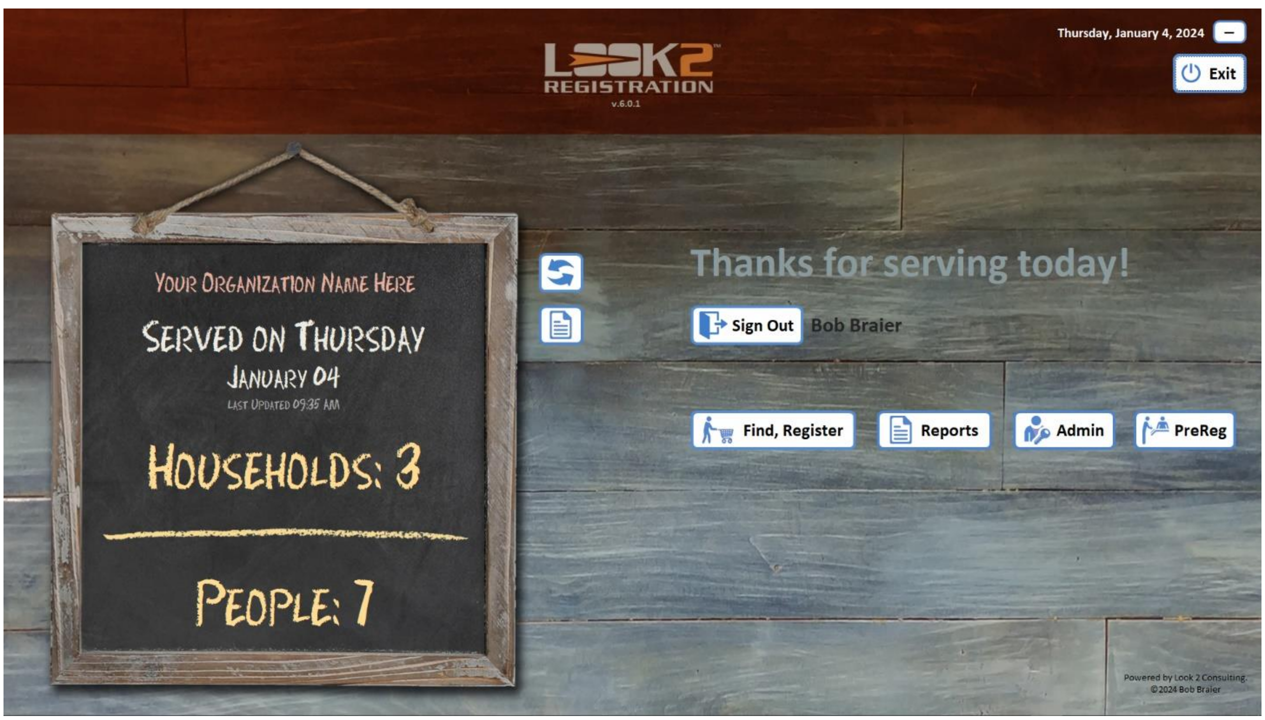
INSTALLATION NOTE: If you have not yet installed the software, or need help initially launching the program, please refer to the *Look2 Registration Quick Setup Guide* PDF available on the web site support page.

2. Operational Use – Registrars

The software provides a simple, limited-functionality interface for people who are Registrars, keeping it as easy to use as possible given the wide range of "computer experience" seen in users of the system. It is designed to allow rapid processing of Patrons to help minimize their wait time.

2.1. Home Screen

The system uses a simple home screen which hides confidential Patron data, yet provides some basic functionality for using the rest of the system. A typical screenshot is show below.



2.1.1. Sign-In / Sign-Out

The first step a Registrar must do is Sign In.

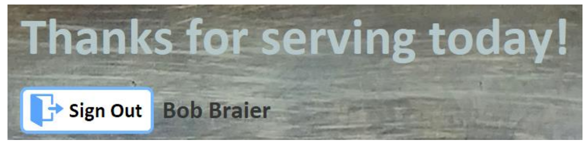
Their account must already have already been created in the system by an Administrator.

Simply select the appropriate name from the drop-down list. You can either start to type your name (the software auto-completes as you type), or click the arrow to select from the list of names.

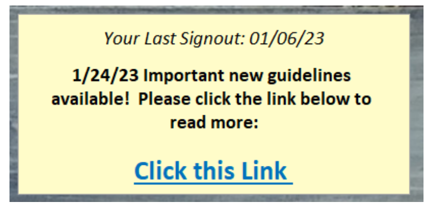
Once the Username has been selected, either click on the password field with the mouse, or use the TAB key or the ENTER key on the keyboard to advance to that entry. Then, enter the appropriate password. As you type, *'s will be shown instead of the actual characters typed to help keep the passwords private.

With the Username and Password entered correctly, click on the Sign In button. (Alternatively, for people who prefer to keep their fingers on the keyboard, use the keyboard TAB key to navigate to the button and press the ENTER key).

After successfully signing in, the system shows a message, the Registrar's name and a Sign-Out button.



The system may ALSO optionally show a signin notice if one has been configured for your system (which may also have a hyperlink to a document and/or website). This is useful for informing registrars of new policies/procedures. If one appears when you sign in, please read it (and click the link if one is provided).



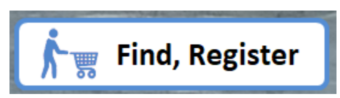
When done working the Registration desk, users should remember to click the Sign Out button.

➡ Note: the system records the date and time each Registrar signs in and out.

With a Registrar signed in, additional buttons also appear on the home screen, each of which are now explained.

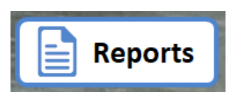
2.1.2. Find, Register Button

Clicking the *Find, Register* button brings up the main screen for processing Patrons. Details on this are covered in the next section in this document.

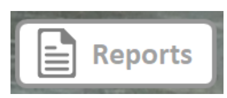


2.1.3. Reports Button

Clicking the *Reports* button brings up the selection of System Reports. It is accessible by Registrars who have the role of Reports or of Admin. Details on this are covered in the Reporting chapter in this document.

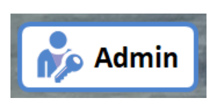


This button is disabled if the Registrar does not have the role of Reports or of Admin.



2.1.4. Admin Button

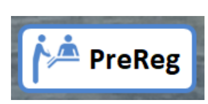
Clicking the *Admin* button brings up a control panel for various administration task. It is accessible by Registrars who have the role of Admin. Details on this are covered in the Administrator Functions chapter in this document.



This button is disabled if the Registrar is not an Admin.

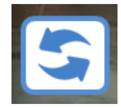
2.1.5. PreReg Button

Clicking the *PreReg* button brings up the Pre-Registration Import Window. It is accessible by Registrars who are not assigned the Express role. Details on this are covered in the Pre-Registration Functions chapter in this document.



If the current Registrar has a role of Express, or this feature is disabled, this button is hidden.

2.1.6. Refresh Button



Next to the statistics showing Today's Households and People served is a Refresh button.

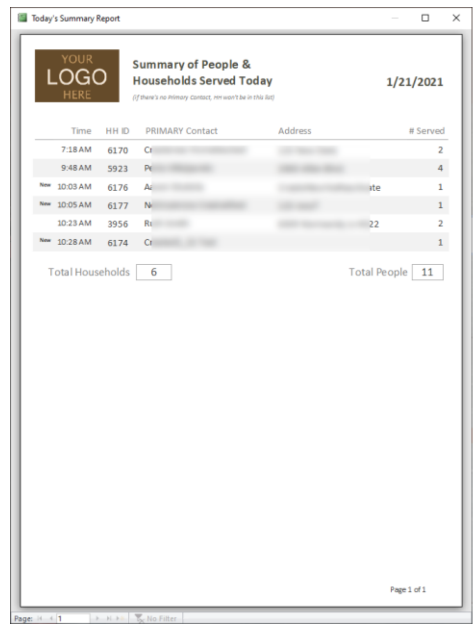
If there is only one Registration terminal in use, this button in general does not have to be pressed, since the data automatically refreshes whenever another household has their records updated on that PC. At the start of any shift, before anyone has been registered for the day, yesterday's data will still be shown.

If there are two or more Registration stations active at the same time, the statistics reflect the aggregate of everyone served from all PCs. However, it does not auto-update if you are just sitting on this home screen; hence this button.

Simply click the Refresh button to ensure the statistics shown include the latest information from the other Registration desks.

2.1.7. Today's Report Button

If a Registrar is signed in, a Today's Report button appears next to the main screen chalkboard. This button is disabled if no one has been served yet for the day.



Clicking it brings up a report showing each household's primary contact, the number of people in their family, the time of their visit, their street address, and their household ID. It also shows the summary total numbers for Households and People.

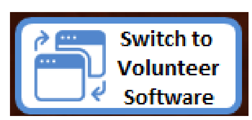
If a household is new (i.e., they were created the same day as the report), the word "New" appears at the start of the row.

If tracking labels are defined, columns are shown on the right.

To print this report, press CTRL-P. Alternatively, you can right-click on the report to bring up host of other options of what you can do with this information.

2.1.8. Switch to Other Look2 Software (Volunteer or Inventory)

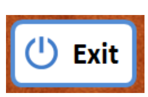
While it is recommended that the Registration software run on its own machine, there are some smaller organizations wanting to run either the Volunteer or Inventory software on the same machine as the Registration Software.



If the Registration Software detects that either software is indeed running (it checks at startup, as well as every time a record is stored to the database), an additional button appears at the top of the screen.

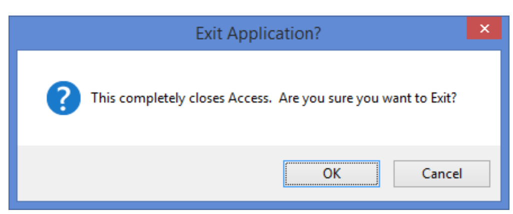
Pressing it will bring up that software to the front.

2.1.9. Exit Button



The home screen has an Exit button.

Pressing it will completely close the Registration software. A dialog appears to confirm the action.



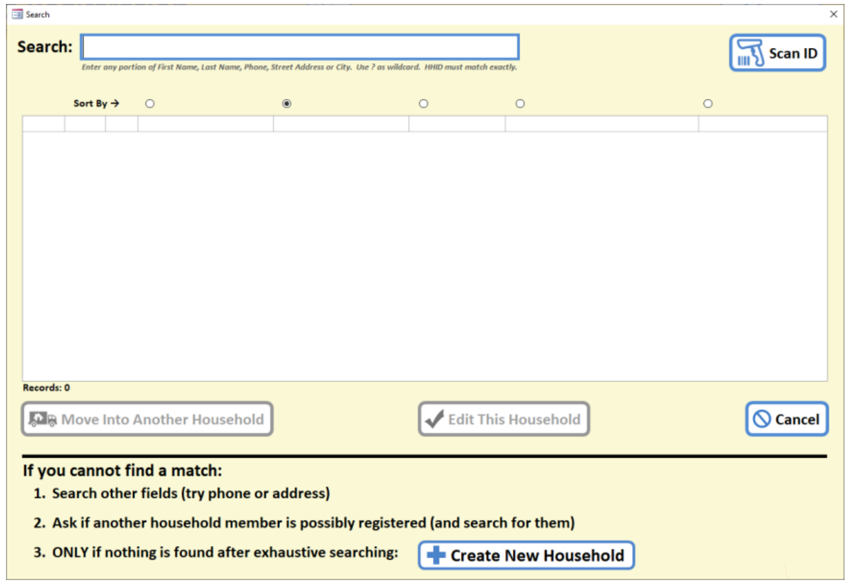
2.2. Find/Search

Pressing the *Find, Register* button on the Home screen brings up the Registration Screen. It is initially blank, with only two buttons shown at the top.

Pressing the Find button brings up the Search Screen.

(This is done automatically when you first open the window. Furthermore, the Scan Barcode dialog may also automatically appear if so configured for your site).

Note: the bottom section for creating a new household is hidden if the user's Role or workstation type is "Express".



2.2.1. Search by Name, Phone, Address, Household ID

You may enter into the Search field any portion of either the first name, last name, phone number, street address, or city name. As you type, the search results are instantly updated, and the number of records found is shown below the table. You may also enter a Household ID, though that must be an exact match, not partial as for the other search fields.

You may also search using multiple criteria. Simply type a space-character in between each item.

NOTE: if you are not sure of the exact spelling, enter only the letters you are sure of. This way you won't accidently filter out the desired person!

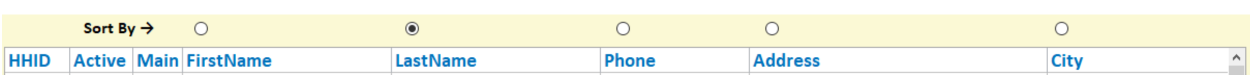
For example, if you're searching for "Julio Gonzalez", but not exactly sure how it might have been entered into the system, you could simply enter:

"J Gonz"

► TIP: If their phone number hasn't changed, entering in the last 4 digits of their phone is also an excellent way to find someone.

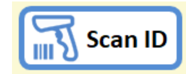
Optionally use a question mark as a "wildcard" for any character. For example, a search criteria of "Anders?n" returns results for "Anderson" as well as "Andersen". *(To search for a ?, enter [?])*

By default, the results are sorted by the LastName column. You may sort by any of the other four columns by clicking on the small circle at the top of the respective column.



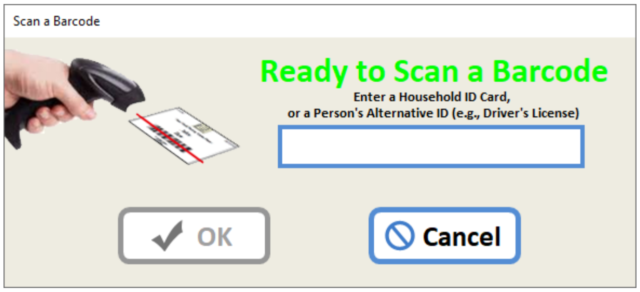
If a person has been deactivated, "no" will be shown in the Active column. If they are designated as the Primary Contact for their household, an asterisk "*" will be shown in the Main column.

2.2.2. Search Exclusively by Household/Alternate ID … Barcode



As an alternative to entering in search text, you may also look up a specific household using ONLY their Household ID number or an Alternative ID for a given Patron.

Press the Scan ID button to bring up a prompt for the numeric ID.



You may either manually enter their Household ID number if you know it, or use a barcode scanner to scan either:

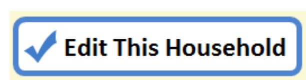
- the bottom of a previously printed Visit Ticket *(see Section 2.4.15)*
- their Household ID Card *(see Section 2.4.18)*
- an Alternative ID (e.g., the small 1D barcode on the back of Driver's License, or any other ID card having a numeric ID that was associated with that particular Patron)

Once the number is in the entry box, press OK to initiate the search *(your barcode scanner may automatically press the OK button for you)*.

If a match is found, that household is immediately brought up for editing.
If no match is found, the Search field updates to reflect which ID was scanned.

IMPORTANT NOTE: The Household ID is unique per system. Therefore, an ID Card from one organization will **not** work for that specific household at different location.

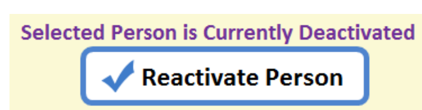
2.2.3. Edit This Household



Select the desired name in the search results table. If that person has not been previously deactivated, press the Edit This Household button to then edit that person's household information and register them for the day's visit. Details on these operations are covered later in this document. (Shortcut: simply double-click on their name in the list).

2.2.4. Reactivate Person

If the selected person in the search results has been previously deactivated, the button changes to highlight this fact.



Pressing this button brings up the Reactivate Someone window. Details on this operation are covered later in section 2.5. (Shortcut: simply double-click on their name in the list).

2.2.5. Move Into Another Household

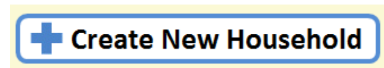
See Section 2.6 for details. (Note: this button is hidden if the user's Role is "Express")

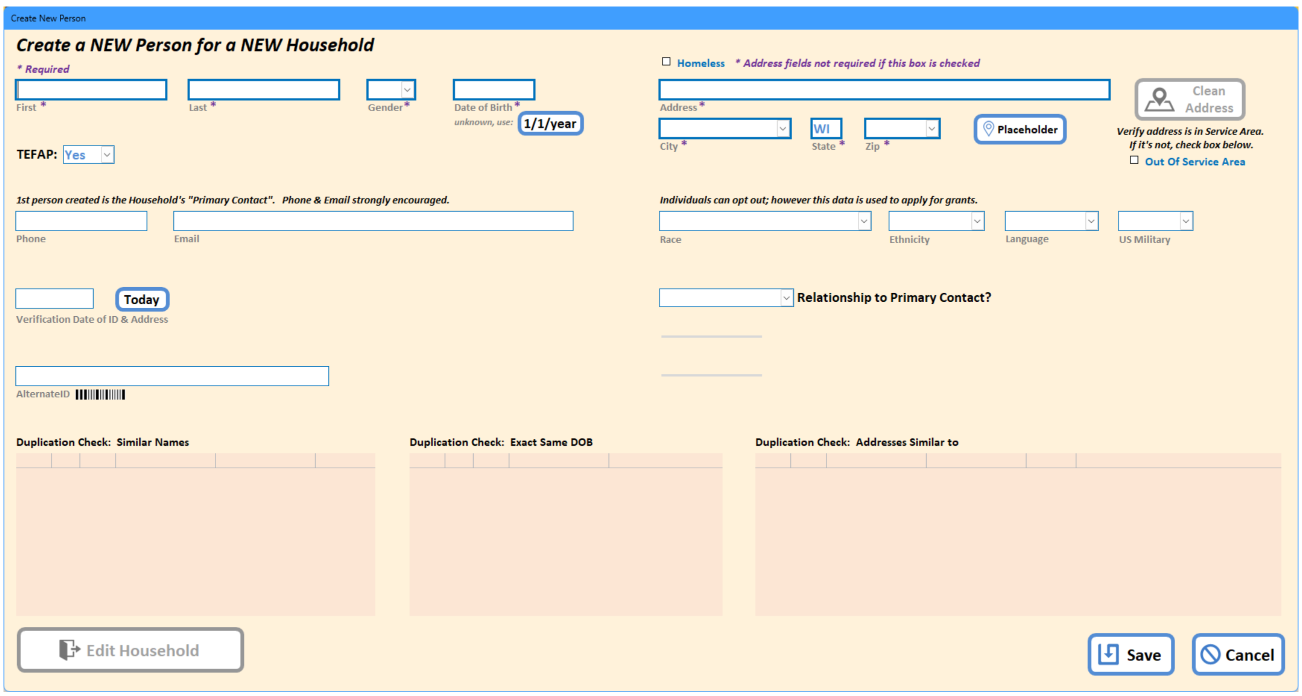
2.3. Create New Household

At the bottom of the Find window is a Create New Household button. It is initially disabled, making sure you first search for that person/household using a number of different techniques:

- Name *(try first and/or last, with only partial spelling to catch any misspelled/mis-entered names)*
- Phone *(try only the last 4 digits)*
- Current AND Previous Addresses
- The above but with other household members

Once something is entered in the search field, the button becomes enabled. Only if your exhaustive search has resulted in no match should you press this button to establish an entirely new household. The Create New Person form is then shown:





2.3.1. Name, Gender, DOB

At the top of the New Person/Household form are the required fields:

- First Name
- Last Name
- Gender (M/F/O)
- Date of Birth

If an exact DOB is unknown, it is suggested a placeholder gets entered with an appropriate ballpark age *(since age is used in various reports, and affects other software features).*

You can use the "1/1/year" button to quickly set the DOB placeholder by age-range category. Also add a household note (described later) stating the DOB is just a placeholder.

When entering names, the software auto-corrects capitalization, making the first letter upper-case and the rest lower-case (*with exceptions for apostrophes*).

Should you encounter a name which does not follow this convention, you can correct such capitalization later, when editing them again from within the household (the edit person dialog does not apply auto-correction).

2.3.2. Address Fields

The address fields, including City, State, and Zip Code, are required. The only exception is homeless people, in which case check the box provided and the address fields become disabled. ☑ Homeless

After entering the address, press Check Address. (NOTE: your screen may show it as "Clean Address" if the verification website setting hasn't been defined for your location). The software will "clean" the street address, conforming to US Postal guidelines. Example: Clean Address

"123 East Main Street, Apartment #2" becomes *"123 E MAIN ST #2"*

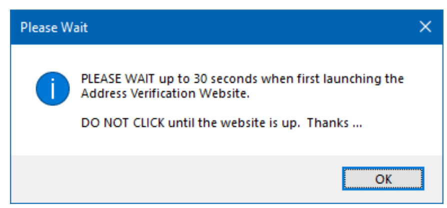
If the address is not within your organization's service area, check the box: ☑ Out Of Service Area

Clicking the Placeholder button enters address values to help indicate that information is not known at the time. (Addresses can be edited later.) Placeholder

2.3.3. Address Verification Website

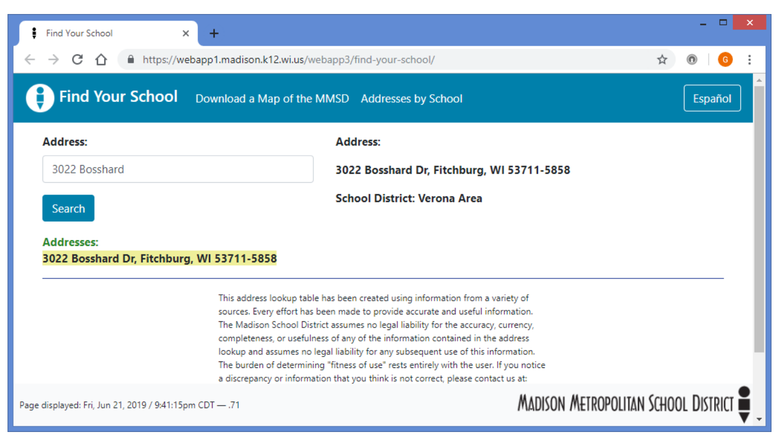
If an Address Verification Website has been defined, pressing the Check Address button will launch the default web browser showing the configured web site. Check Address

There's always a chance your configured website may not respond properly (e.g., down for maintenance, etc.) and it might take up to 30 seconds before the system times out. So, a message box appears asking you to wait just in case.



The street address you had just typed in is automatically copied to the Windows Clipboard, so you can simply paste it into the desired search field on the web site (either via right-click-paste, or CTRL-V).

In the example shown, an address has been pasted into the Search, and the address found has been selected to show the School District.



The specifics for the web verification vary, depending upon the site your organization uses.

When done, click the close button on the web browser to exit the website and return to the New Person/Household form.

2.3.4. Avoid Creating Duplicate Entries

It is important to enter people only once in the system. The software performs various checks when creating a new person (either for a new household, adding someone to an existing household, or importing from the Pre-Registration system) to help avoid duplicates.

It first checks for an exact match of the first and last names (though it ignores generic names of “Child”, “Adult”, “Senior”, “Unknown”, “Need”). If an exact name match is found, an alert message is shown:

Alert: duplicate name exists in household 9788
Duplicate name is Active, DOB = 12/20/1971

Furthermore, if the date of birth also matches, the chances of it being a duplicate are extremely high. An additional warning is shown.

WARNING: Name & DOB exists!

If only a partial name match is found (looks at the first 4 characters of the first and last names), a caution message shows the partial name match:

Caution: partial name match in household 9788
Bob Braier: Active, DOB = 12/20/1971

Because there may be more than 1 potential partial name match, a table is shown listing all similar names found.

Duplication Check: Similar Names

HHID	Main	Active	FirstName	LastName	DOB
9788	*	YES	Bobbert	Braier	12/20/71
9791	*	YES	Bobby	Braierson	12/20/71

A table of people with the exact same date of birth is also shown to help catch names that may not match (e.g., “Robert” vs. “Bob”) .

Duplication Check: Exact Same DOB

HHID	Main	Active	FirstName	LastName
9788	*	YES	Bobbert	Braier
3490	*	YES	Robert	Braier

For new Households, a list of similar Addresses are also shown.

Duplication Check: Addresses Similar to 123 E MAIN ST #2

HHID	Active	FirstName	LastName	DOB	Street
9788	YES	Bobbert	Braier	12/20/71	123 E Main

Look through all of these tables to help ensure you are not creating duplicate people within the system.

If there appears to be a match, do NOT continue creating a new duplicate. Instead, click the Cancel button to close out the create session.

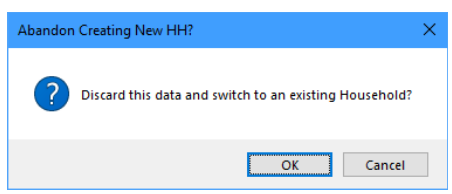
Cancel

Alternatively, select a person in one of the tables and press the Edit Household button. The software will first confirm you wish to discard any entries already made:

Duplication Check: Addresses Similar to 123 E Main

HHID	Active	FirstName	LastName	DOI
9788	no	Bobbert	Braier	12/

Edit Household 9788

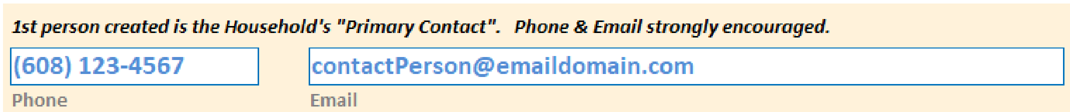


This will switch to editing the existing person from within their existing household. If they were not active, it will first allow you to reactivate that person.

DUPLICATE PERSON EXCEPTION: one case for actually creating a duplicate is for a child whose parents are divorced and both have joint custody and both use your organization’s services. In this case, entering the child under both households is permitted.

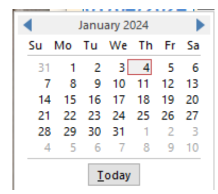
2.3.5. Contact Info (Phone, Email)

Although not technically required, the person's phone and email are strongly encouraged, as this first person being entered is considered the Primary Contact for this household (this designation can be changed later once other members are added to the household). The phone number also can serve as a search field (entering the last 4 digits of their phone number when first looking them up in the system is often easier than spelling their name).



2.3.6. Verification Date

Be sure to enter the date in which you verified the person's ID and address. While you can enter the date by hand (in case you are entering data from a past log sheet), in most cases you can simply press the Today button to quickly fill in this field with today's date.



Alternatively, use the small calendar icon (which appears in the upper-right when you click within this field) to bring up a calendar control.

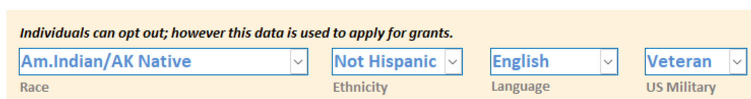
NOTE: if you were not able to verify the person's information, you may leave this field blank. The software treats the Patron as non-verified.

2.3.7. Demographic Fields

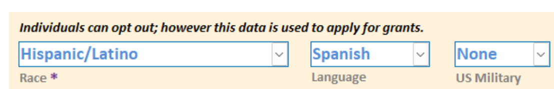
The next section contains optional demographic information about the person you are registering. (NOTE: each person in the household has their own set of these fields ... they are on a per-person basis).

If your organization applies for grants, PLEASE do not leave blank.

If someone prefers not to answer any/all of these items, select OptOut from the available dropdown list; that way it's understood that they were at least asked (as opposed to this being skipped in its entirety).



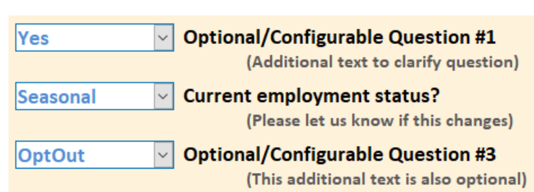
There's an option to make Race required. If set, a purple asterisk appears and the field cannot be blank. There's also an option to hide Ethnicity.



2.3.8. Person Questions (Configurable)

There may be up to three additional questions (these are configurable per location, so there may be none shown, or just 1 or 2). As with the other demographic fields, each person in the household has their own set of answers ... they are on a per-person basis.

If someone prefers not to answer any/all of these questions, select OptOut from the available dropdown list (if that answer has been configured as a selection); that way it's understood that they were at least asked (as opposed to this being skipped in its entirety).

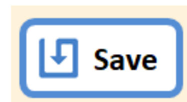


2.3.9. Alternative ID

Each Patron can also have an Alternative ID associated with their record. You can either manually enter a number in this field, or use a barcode scanner to enter it for you (simply make sure you are in this entry box prior to scanning their ID, so it gets entered into this field).

For example, you could scan the barcode back of their driver's license (the smaller one as shown to the right) and have that long number be their Alternative ID. Then, when they come back, simply use a barcode scanner to locate them via their driver's license!

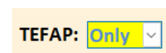
2.3.10. Save



When done entering all of the information, press the Save button. If you instead press Cancel, all information entered in this form is lost.

2.3.11. Add People Placeholders (Configurable)

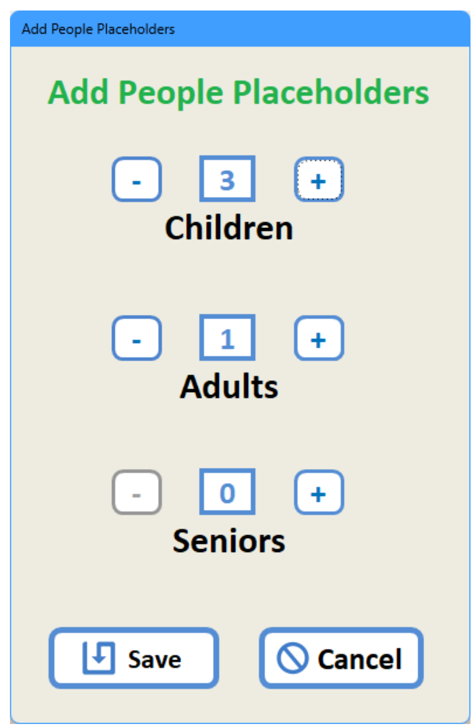
After pressing Save, the system may prompt for adding additional people placeholders into the newly created household. This will only happen if:



- The setting for this feature is set to “TEFAPOnly”, and “Only” is selected from the TEFAP selection when creating the new household

Or

- The setting for this feature is set to “Yes” (so it always prompts)

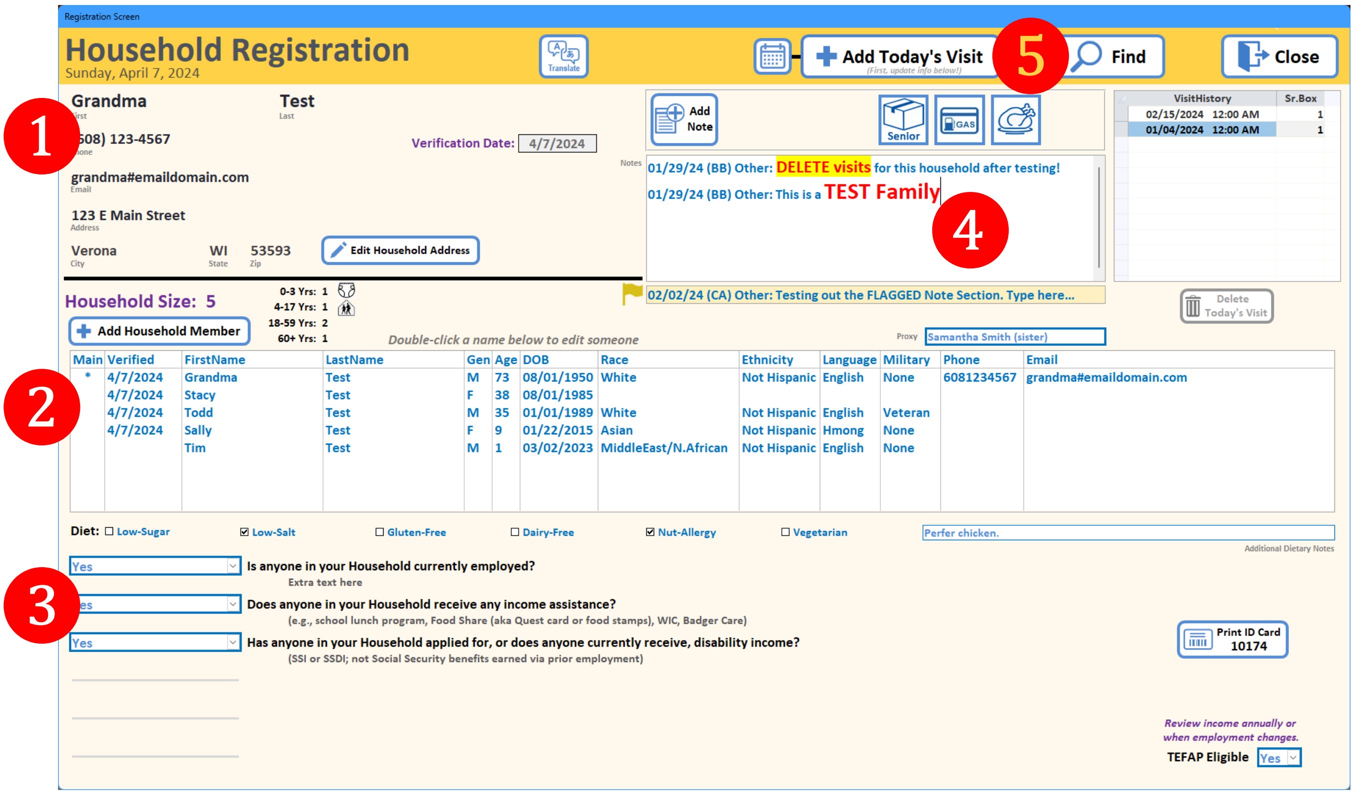


The window allows for an entry of the number of children, adults, and seniors into the household. Use +/- buttons to adjust each number (or type a number directly in the entry field).

Pressing the Save button will then create the additional people into the newly created household. Their first names will begin with “Child”, “Adult”, “Senior” with last names matching that of the primary contact just created. Gender is set to “O”. If Race is required, it's set to “OptOut” (otherwise it's just left blank).

2.4. Patron Household Data Screen

Once a patron has either been selected from the existing Search results and the Edit This Household button has been pressed, or a new Patron has been created using the Create New Household button, the main Registration Screen is shown.



Numbers have been overlayed for the various sections of the screen and explained below.

2.4.1. Typical Sequence of Operation Flow

This screen consolidates all of the information normally used during the registration process. While there is a lot of data presented, understanding the sections they are in and the flow of using the various groups of information will help make it an easier process. Later sections of this document will go into greater detail for each grouping of data; this section gives a quick overview.

A typical workflow is to *(see the corresponding numbers on the preceding screen shot):*

❶ verify the Patron's personal info *(typically the Primary Contact for the household)*

❷ review household members, verifying names, ages, and counts are correct

❸ ask/update the overall Household Dietary Restrictions and Questions *(customizable per site)*

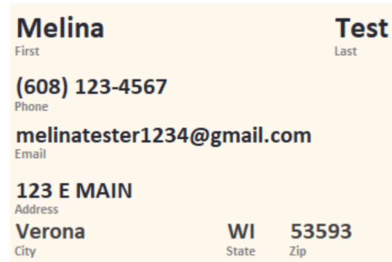
❹ enter any special household notes and review the "icon-flags" presented

❺ once everything has been reviewed and updated, a visit is added to the history

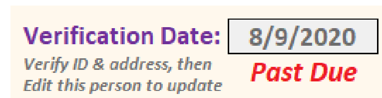
The details window can then be closed and the Registrant is returned back to the Home Page with updated statistics on those served for the day.

There are, of course, variations to this flow, and other operations (such as editing or adding a person, changing the address, etc.) can be performed. Details are given in the sections which follow.

2.4.2. Verify Name/Address/Area-Served



The information for the selected Patron is shown at the very top of the screen, including their first and last name, phone, email, and address. These are read-only fields, presented in a larger font meant to facilitate a quick review with the Patron.
(NOTE: this contact info is hidden for Express users.)

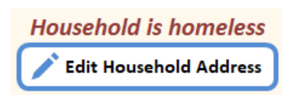


Also shown in a read-only field is the Verification Date. If this is blank, or older than policy dictates, a Past Due message is show. Please verify their ID and address to update this important information.

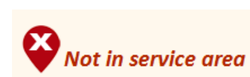
Editing of the name, phone, email, as well as the Verification Date, are handled via the household member table, described later in this document.

The address, however, can be edited right here via the Edit Household Address button (described in the next section).

A couple of variations worth noting include:



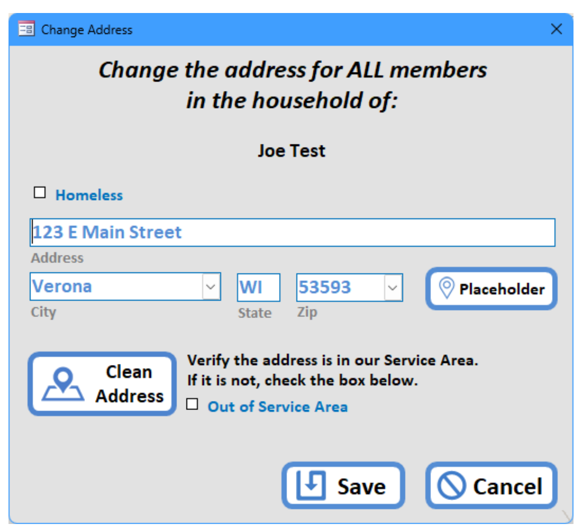
- If the person is homeless, the address fields are blank, and "Household is homeless" is shown instead.



- If it was marked that the address was verified to be outside of your organization's service area, a message is shown to help highlight this fact.

2.4.3. Edit Household Address

If the address for the Household needs to be updated (perhaps they moved, or it was entered incorrectly by a previous Registrant), press the Edit Household Address button.



A dialog appears, allowing the entry of the corrected Address, City, State, and Zip Code.

If the household is Homeless, please check the box provided. The reset of the form's address fields and controls are then cleared and become disabled.

Conversely, if they used to be homeless and are now living somewhere, un-check the Homeless box to re-enable the address entry fields.

After updating the address, please click the Check Address button to better conform the Address to the US Postal guidelines, as well as bringing up the Address Verification Website (if configured for your site). See section 2.3.3 for additional details.

Clicking the Placeholder button enters address values to help indicate that information is not known at the time.

2.4.4. Household List

The list of all members in the selected household is shown in the table.

At the top of the table is a count of the total people in the Household, making it easy to put it on a shopping slip.

Household Size: 4

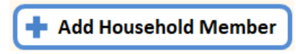
All members in the household have their information shown in these columns:

1. Main: shows a star/asterisk (*) if they are the Primary Contact for the Household
2. Verified: shows the date each individual's ID has been verified by a Registrant. If any are blank, their IDs should be verified and that person's date should be updated.
3. First Name
4. Last Name
5. Gender *(either M, F, or O)*
6. Age *(automatically calculated based on DOB, in years)*
7. Date of Birth *(DOB)*
8. Race
9. Ethnicity *(there's an option to hide this column)*
10. Language
11. Military Status
12. Phone
13. Email
14. PQ1, PQ2, PQ3 *(optional ... the Personal Questions if so configured for your location)*

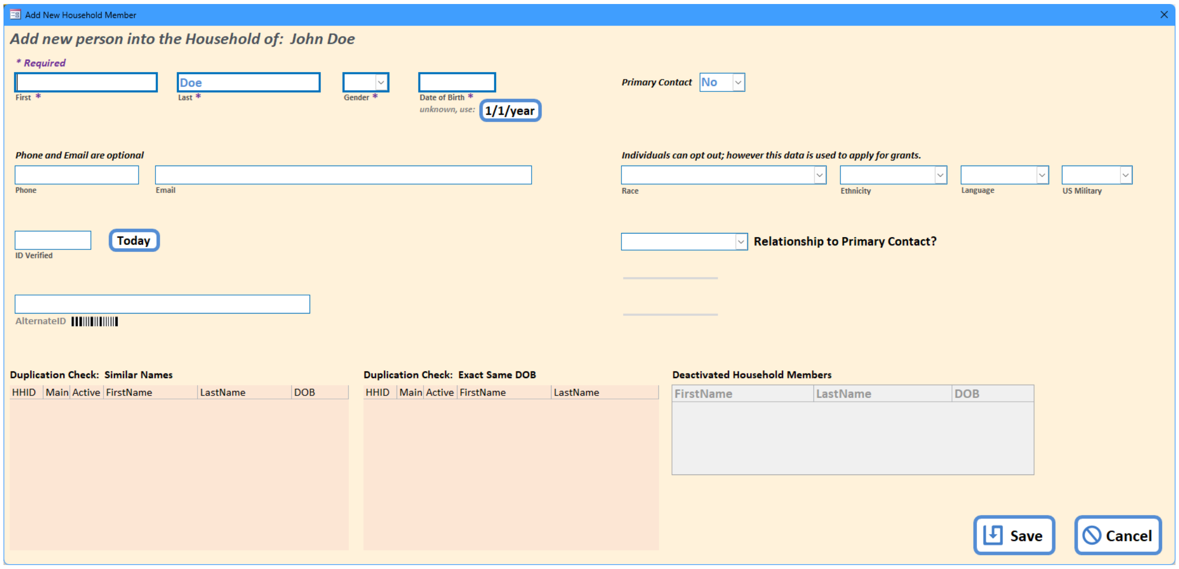
Main	Verified	FirstName	LastName	Gen	Age	DOB	Race	Ethnicity	Language	Military	Phone	Email
*	4/7/2024	Grandma	Test	M	73	08/01/1950	White	Not Hispanic	English	None	6081234567	grandma#emaildomain.com
	4/7/2024	Stacy	Test	F	38	08/01/1985						
	4/7/2024	Todd	Test	M	35	01/01/1989	White	Not Hispanic	English	Veteran		
	4/7/2024	Sally	Test	F	9	01/22/2015	Asian	Not Hispanic	Hmong	None		
		Tim	Test	M	1	03/02/2023	MiddleEast/N.African	Not Hispanic	English	None		

NOTE: The information in the table is read-only (i.e., you cannot directly edit the data within the table). To edit someone's information in the household, double-click on a name to bring up the Edit dialog, as described in 2.4.6.

2.4.5. Add Household Member (and Reactivate Existing)



To add new member, press the Add Household Member button. The entry window is similar to the one described earlier for creating a new household. See section 2.3 for details.



Differences when adding a new member into an existing household:

- The name of the person selected from the Find window to edit the household (typically the Primary person) is shown at the top of the form.
- The last name of that selected person is automatically entered in the Last Name field for you, but this can be overwritten. It is merely entered as a potential savings of data entry should the new household member share the same last name.
- It is assumed that the first person created for the household is the primary contact. Therefore, the phone and email fields are flagged as being optional for additional members of the household.
- If you select YES for the Primary Contact field, the previous primary person in the household will be marked as no longer being primary. Please, then, enter a phone and email for this new person.
- Address fields are not shown (they are tied to the household to which this person is being added).

Avoid Creating Duplicate Entries

It is important to enter people only once in the system. To help in that endeavor, several checks are performed when you are adding someone to an existing household.

- If a first name matches someone already in this household, a warning message appears after leaving the first name field.

  Warning: this first name already exists for this household!

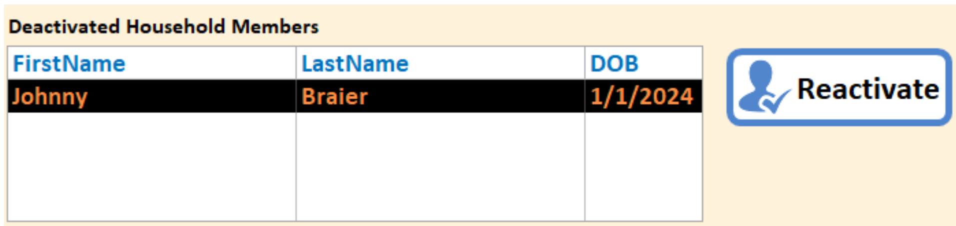
- If the first name entered happens to be in the Deactivated table at the bottom of the form, the warning changes. Should you see this message, do NOT create a new duplicate name. Instead, select their name in the table and press the Reactivate button, described below.

  Warning: that first name is in Deactivated list below! (Reactivate?)

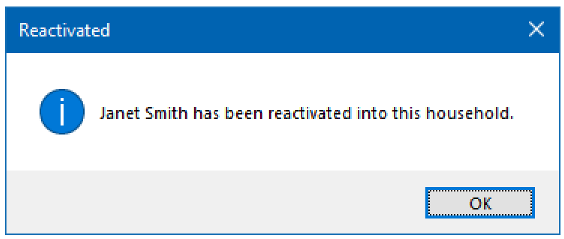
- In addition to checking the names within the selected household, the software also performs the Similar Names check and the Exact Same DOB check as described in Section 2.3.4, showing the results in the tables at the bottom of the form. See that document section for additional details.

Reactivating Someone

All deactivated household members appear in the table at the bottom of the form.

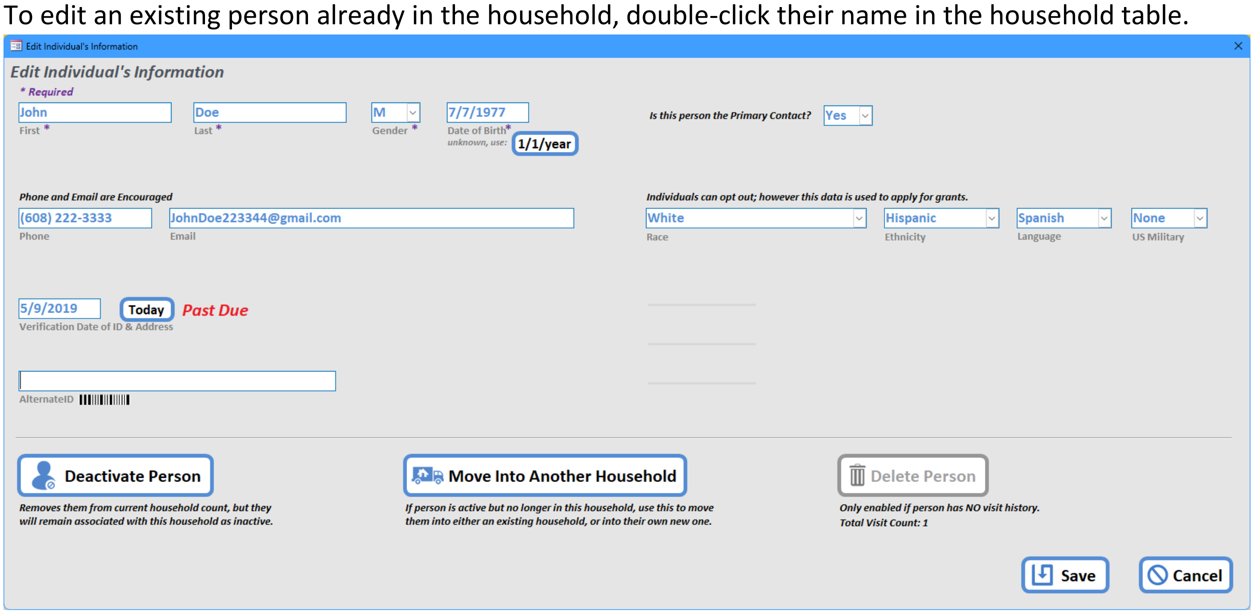


To add a deactivated person back into the household, select their name in the list and press the Reactivate button. Their information is then restored, and you may edit that person.

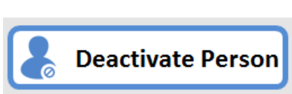


2.4.6. Edit Individual Patron

To edit an existing person already in the household, double-click their name in the household table.



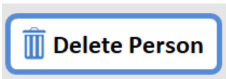
The editor is similar to the one for adding a new household member, but with three additional buttons:



Clicking this immediately deactivates this person from the system and effectively removes them from the Household (they won't be counted in the

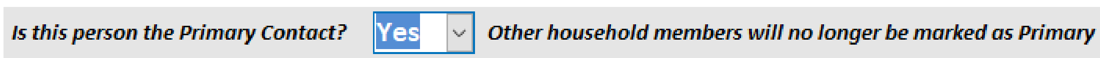
Household Visit). They do, however, remain associated with the selected household and can later be re-activated, as described in sections 2.2.4 and 2.5.

Clicking this button brings up the Move dialog, as described later in section 2.6. Note: if the person being moved is the one that was selected to bring up the current household, the household selection changes to that of the new household. If the person being moved is not the main one selected, the current household remains selected so other editing can occur after the selected person is removed.



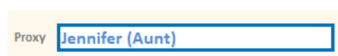
The Delete Person button is only enabled if the selected person has no visit history. Pressing it will delete the person completely from the system (i.e., NOT just deactivate, but truly delete the record). If disabled, it shows the visit count underneith the button.

Also, if a person was not the Primary Contact, but upon editing they are now designated as such, a note is shown indicating that the other person will no longer be considered the Primary.



2.4.7. Proxy Shopper

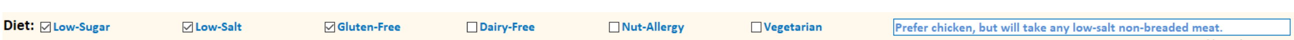
If there is an authorized shopping proxy for the household, you may enter their name in the Proxy field.



2.4.8. Household Questions

The next section contains household questions. There are three different sections of questions for the selected household.

First, there may be a section covering dietary restrictions. This may or may not be shown, and the labels for each of the checkboxes may be different for your organization, depending upon how your system has been configured.



Check the box if there is anyone in the household with that dietary restriction. This information gets used to help stock the food pantry with appropriate items. If there are additional dietary restrictions not covered by these checkboxes, please enter a note in the field provided.

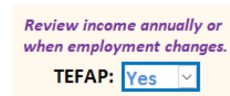
Next are the configurable household questions having multiple-choice answers. There may be up to six (6) questions and associated answers shown, depending upon how your system has been set up.

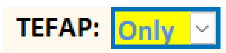
The example shown below has only 3 of the 6 questions defined. Your site may have more or less.

Please do not leave these answers blank. Always ask the questions, and if the Patron prefers not to answer, select OptOut from the dropdown list (if that answer has been configured for your location). This way it can determined if the question was specifically asked, verses skipped all together and thus needs to be asked at the next visit.

TIP: click on any of the above questions on the screen to copy that question's text to the clipboard, so you can paste it into the language Translation screen (section 2.8).

The final Household question relates to TEFAP (if this has been enabled for your organization). Review the TEFAP eligibility per the current guidelines and select either Yes or No from the dropdown list.

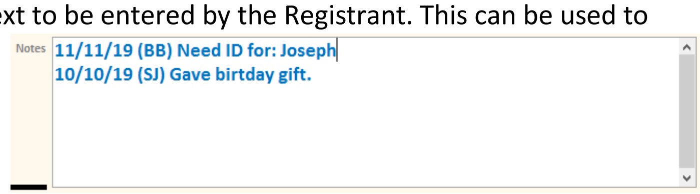




There's also a choice of "Only". This is for food pantries having more restrictive requirements (e.g., requiring ID's) for "full pantry" shopping, but still allow for TEFAP patrons not meeting those requirements to still shop the TEFAP designated food. Selecting this answer in the dropdown highlights the background with yellow, and "TEFAP ONLY" appears on the Visit Ticket and Shopping Slip.

2.4.9. Notes Field

The Notes section allows for free-formatted text to be entered by the Registrant. This can be used to flag any specific needs of the family, issues with the registration process, or other notes deemed important for other Registrants to view the next time this household checks in.

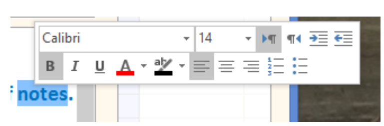


Registrants are encouraged to start their note line with the day/month/year of that note along with their initials in parenthesis, examples of which are shown in the snapshot above. This helps facilitate discussions when someone is unsure of a particular note. They then know when it was entered and by whom, so they can ask about it if necessary.

Better yet, rather than typing in the date and initials manually, use the Add Note feature described in the next section and choose "Other". This automatically enters the date and initials for you.

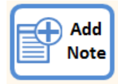
If more text is entered than can fit in the display window, a scroll bar appears allowing you to move up/down the entered text.

Formatting is also permitted. You can use some standard keyboard shortcuts (CTRL+B for Bold, CTRL+U for Underline, CTRL+I for Italic). For more advanced formatting, when you highlight a section of text, a format bar appears allowing for additional changes in font style.

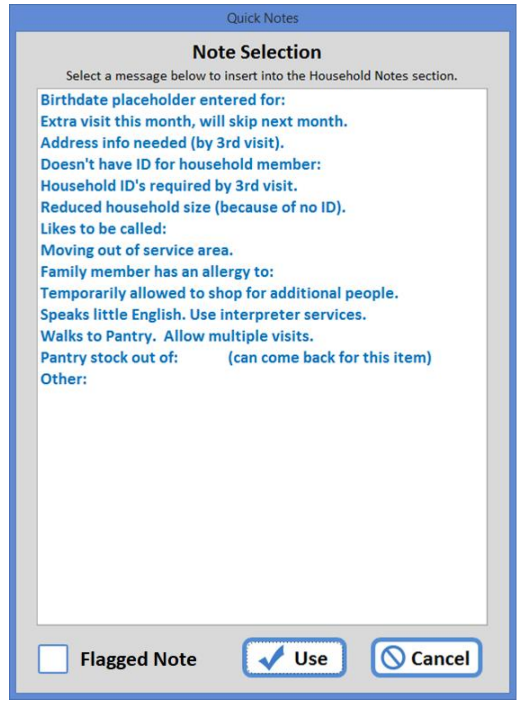


NOTE: these notes are associated with the entire Household, not the individual Patron.

2.4.10. Add Note



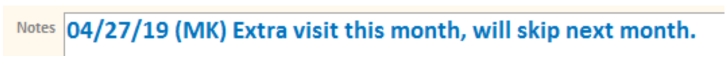
Just above the Notes field is an Add Note button. Pressing it brings up a list of commonly used notes. Using this feature provides more consistency in the notes being recorded.



This list is configurable (via the Admin functions), so yours may not have the same messages as shown in this example.

Select the message you wish to enter into the notes for the household being edited and press the Use button (or simply double-click on an entry in the table).

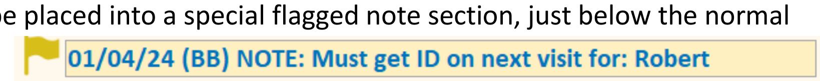
That note is added to the top of the list, pre-pended with today's date and the initials of the current Registrar.



If the Visit Date has been overridden, the date used will be that of the override date selected.

TIP: If you want to add more than one entry at the same time, use CTRL-Click to select more than one prior to pressing the Use button.

By checking the Flagged Note box, the selected note (1st selection if more than 1 is chosen) will be placed into a special flagged note section, just below the normal household notes.



This is handy for important notes that you want to highlight and not have "scroll off the screen" when there are lots of notes for the household.

2.4.11. Icon Indicators, Tracking Notes

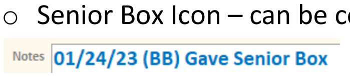
Above the Notes are a series of icons which may or may not appear, depending upon the circumstances for the selected Household and how your system is configured. These icons/buttons include:

- Birthday – Appears if someone in the household is having a birthday within the age and timeframe allowed. It shows the age(s). Clicking the button inserts a message into the Notes field, and it will then also be included on the Visit Ticket.

- Up to 4 "Custom" Icons – These can have different images/messages, depending upon configuration. Clicking one of these buttons inserts a message into the Notes field, and it will then also be included on the Visit Ticket and Shopping Slip.

  Here are some examples (your location may use these, or entirely different ones!):

  - Senior Box Icon – can be configured to appear when someone in the household is > 60



- Laundry Icon – can be configured to appear when the household size <=2

Notes 01/24/23 (BB) Laundry Detergent taken this month

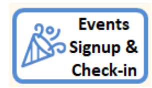
- Gas Card Icon – in this example, this always appears *(not age nor household size dependent)*

Notes 01/24/23 (BB) Gave Gas Card

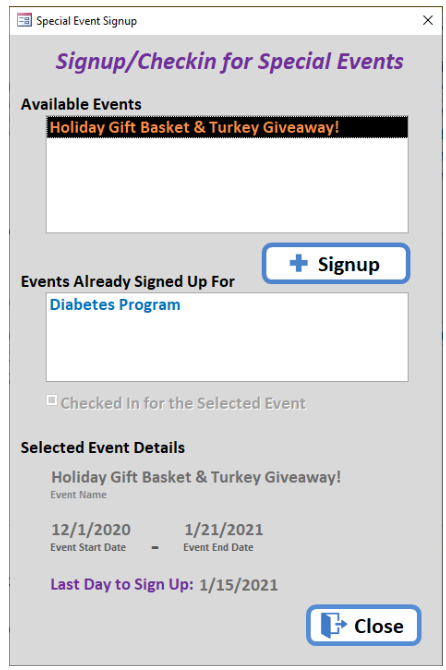
Next to the Household size is a breakdown by age group. If there are children 4-17, a school icon appears to help highlight that fact. Also, if there are one or more children in the household between 0 to X months old, a diaper icon appears. By default X = 36, but can be configured per location (0 means hidden).

0-3 Yrs: 1
4-17 Yrs: 1
18-59 Yrs: 2
60+ Yrs: 1

2.4.12. Special Events Signup



If there is a Special Event having an End Date equal to or later than the current date, the Special Events Signup/Check-in button is shown. Clicking it brings up the Special Event Signup dialog window:

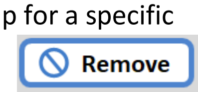


At the top is a list of available events not yet signed up for. Clicking one shows the selected event details (event name, start and end date, and the last day to sign up).

To sign up the current household to a specific event, select the event in the top list and click Signup. A message is added to the household's notes.

Events for which the household has signed up appear in the second list. Clicking on an event in that list will show the details at the bottom of the window.

If a household no longer wishes to be signed up for a specific event, select it in the list and click Remove. A message is added to the household's notes.



To check someone in, select the event in the Signed Up list and check the box just below that list.

☑ Checked In for the Selected Event

2.4.13. Visit History List

There's a list showing the history of the visits for this household. If more visits are recorded than can be shown on the screen, a scroll bar appears and you can thus scroll through to see the complete visit history.

VisitHistory
12/05/19 11:05 AM
08/11/19 12:00 AM
05/09/19 08:24 AM

If your system is configured to track visit type (e.g., food vs. clothing, pickup vs. delivery, Senior Box tracking, or other such labels), additional columns appear to the right of each Visit History date. Use these columns to enter numeric tracking information. For example, record whether it happened or not, using a 1 if true, blank if not. Or, enter the number of people served for a specific type of tracking (e.g., Senior Box). You can even enter pounds taken on each visit (see example screen shot to the right).

Visits	Pickup	Delivery
11/07/23	135	
08/22/23	144	12
06/13/23		154
05/09/23	110	
04/01/23		95
01/24/23	123	

How you use these numeric tracking fields is up to your organization.

2.4.14. Add Today's Visit Record

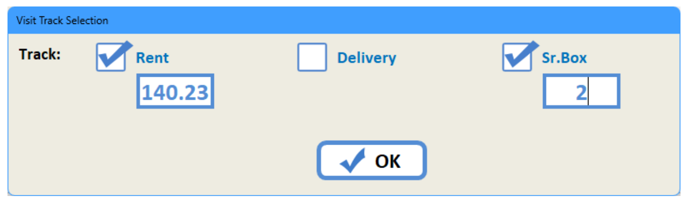
When you are done editing the information for the selected household, press the Add Today's Visit button to record their use of your services.

The software checks to see if any visit frequency limit has been reached. If so, it presents a warning message, as described in section 2.4.16.

When the visit is added, a tone is played as a means of audible confirmation, and today's date is added to the Visit History List. The button then becomes disabled (to avoid double-entries), and the caption changes so Registrars can easily spot if the visit has been recorded.

NOTE: Administrators can select a date used for the recorded visit (i.e., change "Today" to another day), as described in Section 4.1.

If you system has been configured to prompt for additional tracking information, a dialog appears. Since these labels are configured per location, your options will be different than the example shown. Check the box as appropriate for the visit, and enter the number for tracking (exact details are defined per organization, so please consult with your administrator if you don't understand what to enter).

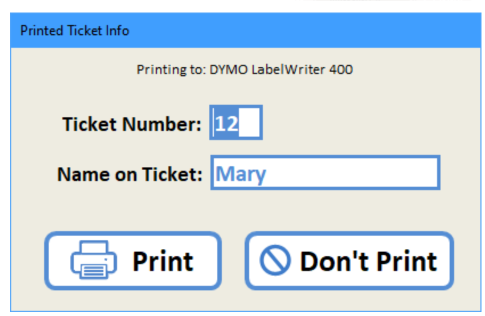


A special case has been created: if tracking is set to "Sr.Box", the number of people 60+ is automatically filled in to that entry field.

2.4.15. Visit Ticket

If a Printer has been configured (see Section 4.3.9) for Visit Tickets, the printing is initiated automatically upon pressing the "Add Today's Visit" button (i.e., there is no separate button … it auto-prints).

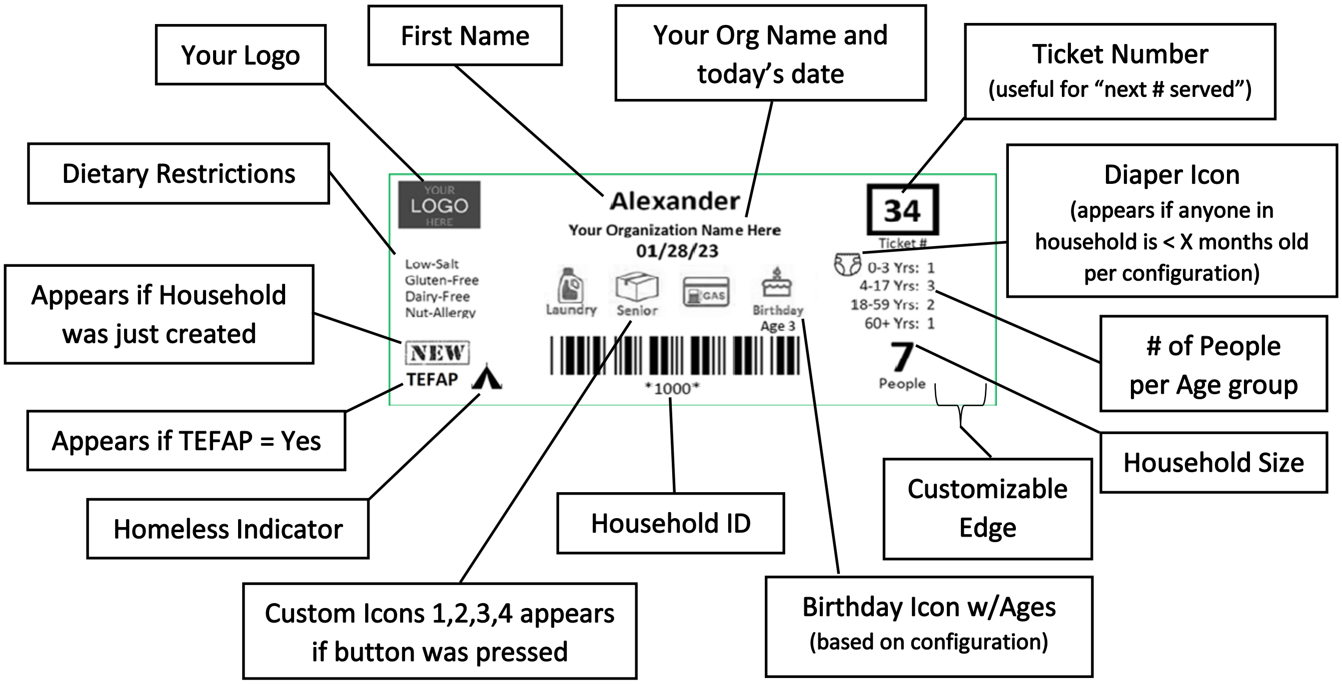
A dialog appears allowing for printout adjustments:



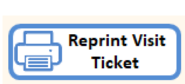
- Ticket Number: defaults to the current household visit count, useful for the "next served number" for waiting rooms. You may override this with a different number.
- Name on Ticket: defaults to the selected person. Enter another name if someone else is shopping for them.

Click Print to send the ticket to the label printer. If you press Don't Print, the ticket is not printed.

Below is an example of a Visit Ticket, with each section explained.



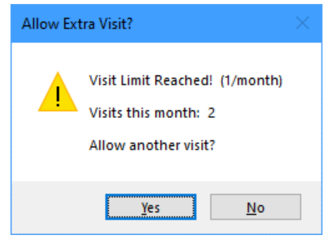
Various elements are shown, depending upon the household selected. To the right is another example of a Visit Ticket for a household with minimal information needing to be shown, and with a right-hand edge defined to highlight the "Ticket Number":



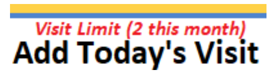
REPRINT: After printing the initial Visit Ticket, a "Reprint Visit Ticket" button appears. Pressing it will again bring up the print dialog, with the correct Ticket # pre-filled in. Note, however, that if a ticket gets reprinted after editing other households (i.e., they come back later to get one reprinted), certain icons may not appear (the 3 custom icons and the birthday icon) since their appearance corresponds to their button press status just prior to printing.

2.4.16. Visit Limit Warning

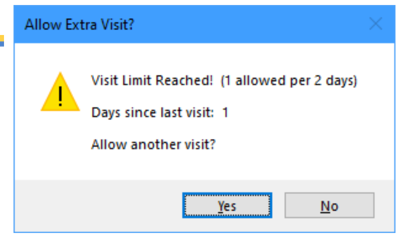
If a visit frequency has been defined, the software checks to see when the household last visited.



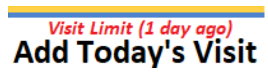
If the frequency is defined as X visits/calendar month (or per calendar week), and the Household has exceeded that count, a red message is shown in the Add Today's Visit button:



It also shows a confirmation message when attempting to Add Today's Visist, yet allows Registrars to decide if another visit will be allowed.



Alternatively, if the frequency is defined as 1 visit per X-days, and the Household has had a visit within that number of days, the message is displayed as:

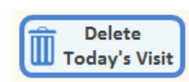


The confirmation message shown when Add Today's Visit is clicked shows the limit and days since last visit.

(NOTE: this warning can optionally be turned off all-together. Also, it is not shown for back-dated visits).

2.4.17. Delete Today's Visit Record

Occasionally a Patron may initially sign up to use your organization's services, but later changes their mind and elects not to have their visit recorded (perhaps they get a call and must attend to other matters, or are tired of waiting, or other such reason).

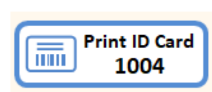


If that is the case, the Registrar can pull up their record again and press the Delete Today's Visit button. The system will remove their entry for today. After the entry has been deleted, this button becomes disabled, and the Add Today's Visit button becomes re-enabled.

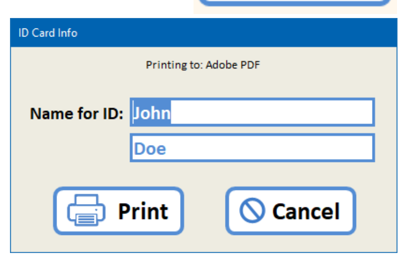
NOTE: Administrators can delete entries for other dates (described in section 4.1 of this document), but Registrars are restricted to deleting only Today's visit.

If you are using Visit Tickets, it is recommended that you keep all of the visit tickets of the people wanting their visit canceled and then delete them once the shift is over (so ticket #'s aren't reused).

2.4.18. Print ID Card



If an ID Printer has been defined for your system, the Print ID Card button will be enabled, and it shows the Household ID number on the button's title.

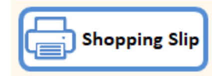


Pressing it brings up the Print ID confirmation dialog. Here you may modify the name that will be printed on the ID.

Pressing the Print button will then create the ID card.

The top 1/3 is customized for your organization. The program automatically then adds the name and household ID, including a scannable barcode that can be used to find them (see Section 2.2.2) on subsequent visits.

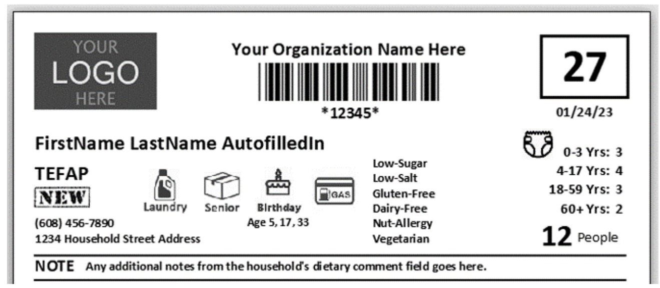
2.4.19. **Shopping Slip (with up to 38 Household Preferences)**



If a Shopping Slip Printer has been defined for your system, the Print Shopping Slip button will be shown. Pressing it brings up the Print Shopping Slip Options dialog.

At the very top, the printer name is shown to which the report will be sent.

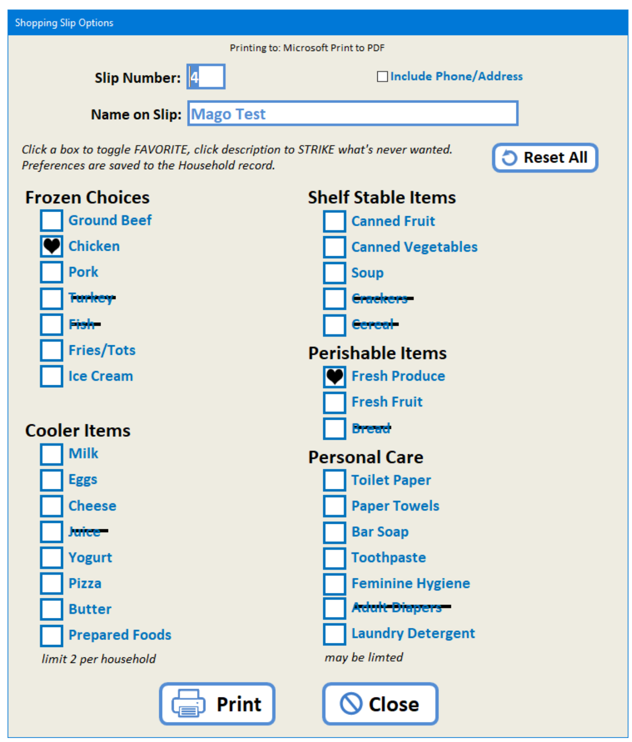
The top 1/3 of the Shopping Slip report is automatically filled in by the software, including:



- logo and organization name
- slip number
- today's date
- household ID and barcode
- shopper's name
- household size
- TEFAP eligibility *(and TEFAP ONLY)*
- # of people within the 4 age ranges
- the diaper icon if it's in the registration screen, and birthday/custom icons if they were pressed
- any of the 5 dietary restrictions that are checked for the household
- any addition dietary notes entered for the household
- if the household was just created, "New" gets stamped just below the slip number

- optionally, phone number and address (helpful when using this for delivery)

Entry fields are provided where you may modify the name and "slip number" that will be printed. Check the box to also include the household's address and phone number on the printout.



The next section of the Shopping Slip is used to indicate food preferences for the household. The entries in this portion are entirely configurable per location. See Section 4.3.13 for details on how an administrator can edit this layout.

To mark something as a favorite, click the box. A heart-icon appears inside the box.

If an item is never desired by that household, click the description next to the box. A line strikes out that entry.

Pressing the Reset All button clears all choices.

In the example to the right, the household never wants Turkey nor Fish, but is OK with Ground Beef, Chicken and Pork … and if given a choice, of those 3 they prefer Chicken.

These preferences are saved per-household. Not only will this save time the next time they shop, but can also be used in food-purchasing decisions.

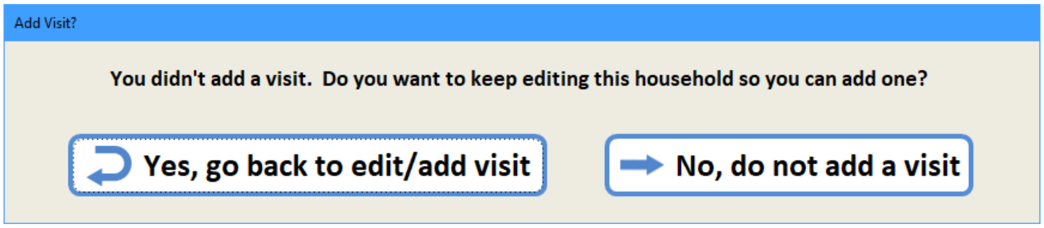
The footnote area at the bottom of the report is configurable per site. Details are given in Section 6.9.

Pressing the Print button sends the Shopping Slip to the configured printer.

2.4.20. Close Registration Screen

When done editing the selected household, press the Close button to return to the Home Screen.

If the Registrar has been editing someone longer than about 5 seconds (time is configurable) and did not added Today's Visit, a warning is shown just in case that important step was forgotten.



Select the option that's appropriate for the situation:

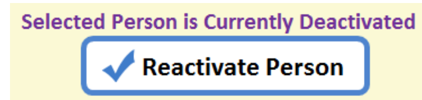
- **Yes**: to return to editing of that Household. You must then press the Add Today's Visit button to complete the process of adding the visit.
- **No**: to close the selected Household without recording a visit.

2.5. Reactivate Someone

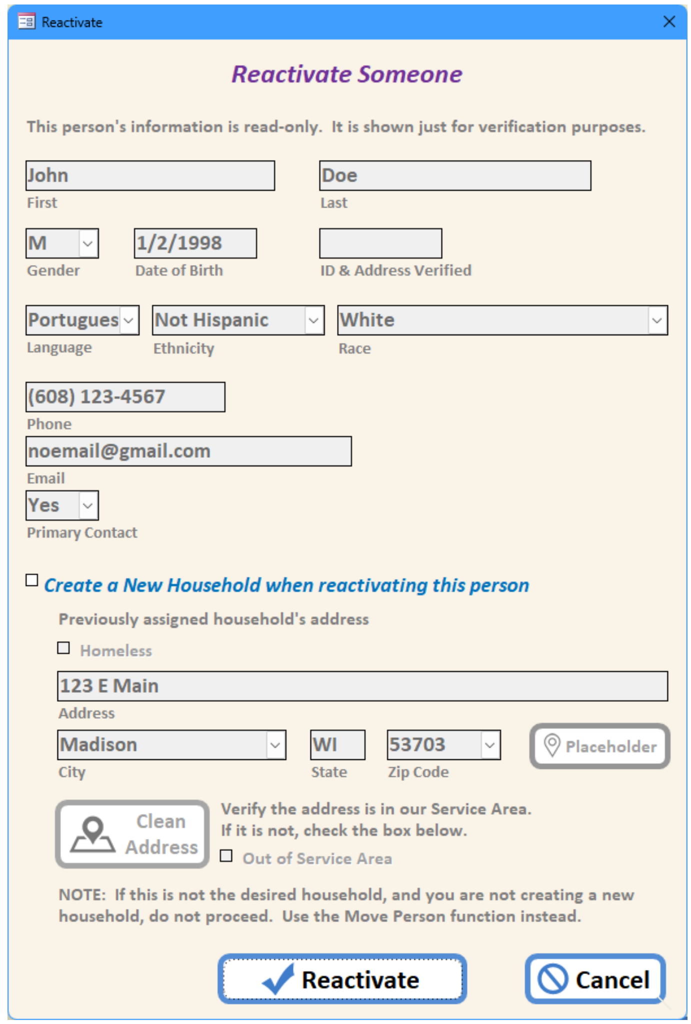
People become deactivated when they are removed from a household. In addition to removal because of death, other reasons exist whereby the person may still use your organization's services in the future. Examples include a child becoming an adult and moving out, a divorce, temporarily deactivated because of not having proper ID/documentation, etc.

In order to reactivate someone who had been previously removed from a household, use the Find feature (as described earlier) and select them in the Search Results table.

Since they were deactivated, the button label changes to Reactivate Person. Press it, and the Reactivate dialog will then appear.

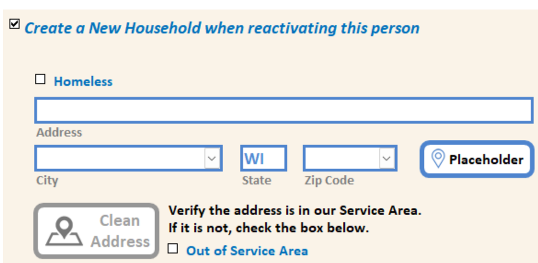


It shows the information on the selected person. Note: it cannot be edited at this time; it is read-only to serve as a confirmation you have selected the correct person.

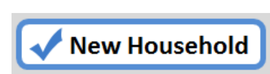


The address shown is that of the household they will be activated back into. If this is not correct, and you do not wish to create a new household for this person, cancel the operation and instead use the Move Person function instead.

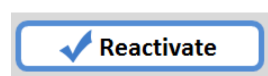
If establishing this person into their own new household is desired, click the *"Create a New Household when reactivating this person"* checkbox to enable the Household Address fields. You may then define the location for this newly established household, or use the Placeholder button if unknown.



If the box was checked, the button at the bottom changes to reflect they will be assigned to a new household.



If the box wasn't checked, they are simply made active into their originally assigned household.

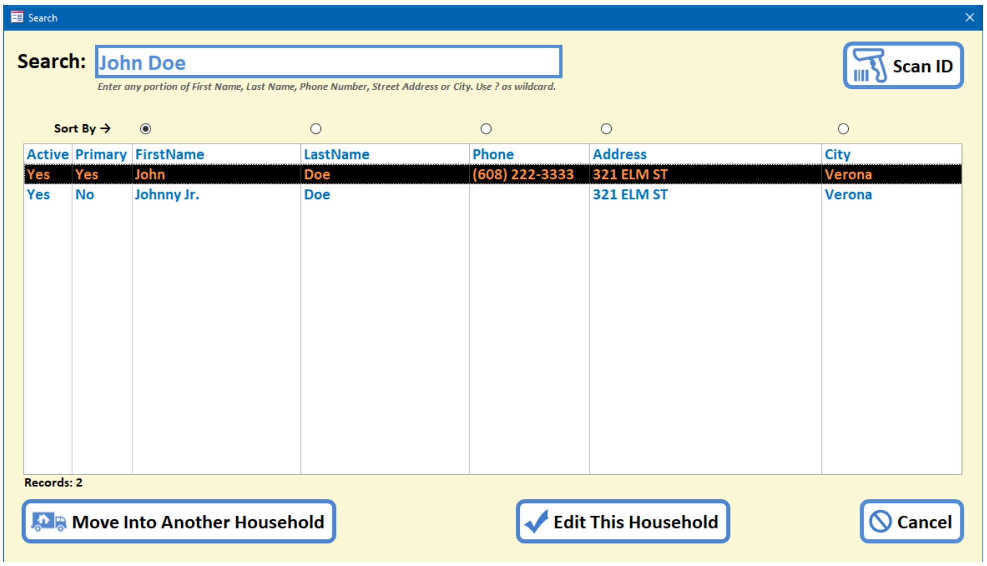


NOTE: you can also reactivate someone while editing other existing household members as described in section 2.4.5.

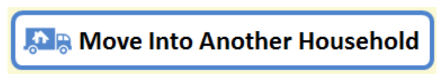
2.6. Move Someone to Another Household

It is sometimes necessary to move someone from one household to another. For example, a foster child may be assigned to another family, or a divorce splits up family members, etc.
(Note: this feature is hidden if the user's Role is "Express")

To initiate such a transaction, use the Find feature to search for the person to be moved.

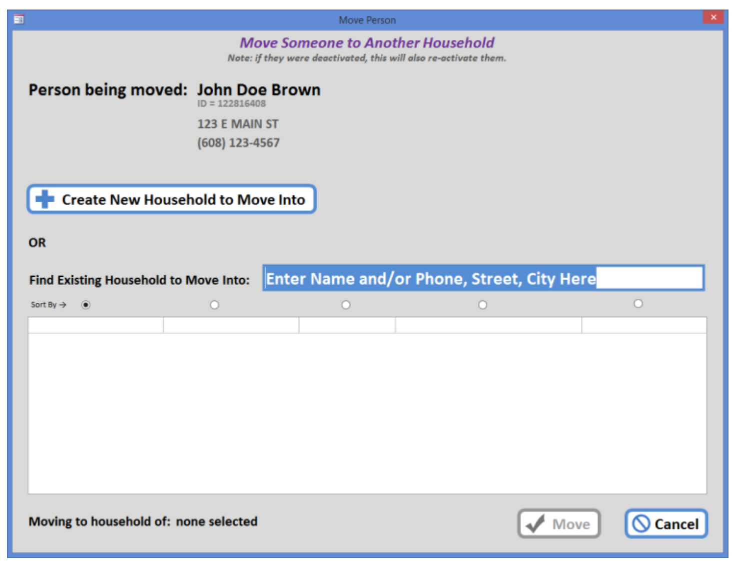


Select their name and click the Move Into Another Household button.



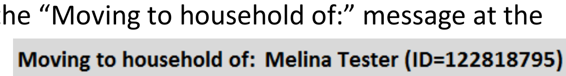
NOTE: this button is also available in the Edit Patron window while editing an existing household.

The person selected is shown at the top of the Move Person window. Their ID is shown for Admin users wishing to note this number. Their address is also shown, though this is their "old" one ... it will change once moved into another household. Also shown is their phone number if they have one.

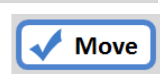


The next step is to either create a new household for them to move into (by clicking that button), or else to find someone in an existing household into which you want to move the selected person. As with all searches, enter any portion of the first name, last name, street address, or phone number.

Click on the desired name in the search results table, and the "Moving to household of:" message at the bottom of the window gets updated with selection.



Finally, double-check to ensure the correct people are selected, then click the Move button.
NOTE: the Move button is gray-out/disabled if a name is not selected in the search results.



The person gets moved, and you are shown a confirmation dialog.

NOTE: if the person was deactivated, their status gets changed back to Active.

2.7. Merge Someone

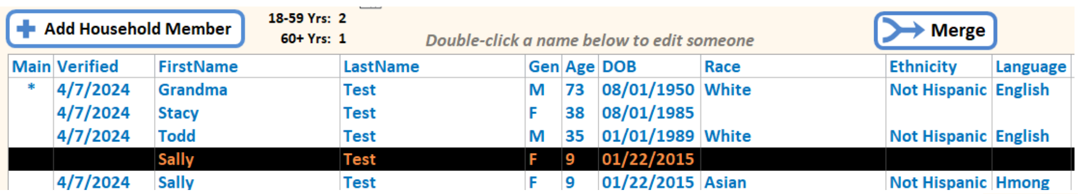
Duplicate entries of Patrons should not be created. The only exception being that of a child whose parents are divorced and both have joint custody and both use your organization's services. In this case, entering the child under both households is permitted.

As noted earlier in this document, the software warns when a duplicate entry (people with the same first name, last name, and date of birth) is about to be created.

Should a duplicate get created and later needs to be removed, a Merge function is available to take those 2 duplicate people and make them into just 1 person.

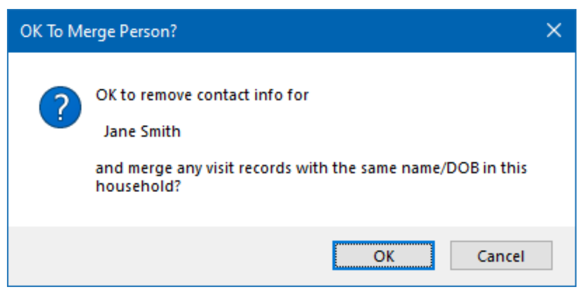
The first step to merging is to make sure the 2 entries are in the same household. You can use the Move function, if need be, in order to make that happen.

Once they are both in the same household, if both people are currently active, a Merge button appears above the Household Members list *(it is disabled until you select one of the duplicate people in the list).*



Select the person you wish to get rid of (merge into the other entry by the same name) and press the Merge button.

The system verifies that you wish to perform the merge operation. Pressing OK will switch any visit records from the person about to merged to instead point to the duplicate person that will remain in the household. It then removes the selected person's contact entry in the database and deletes them from the Patron table.



If one person has already been deactivated (and thus does not appear in the active household list on the main page), click on the Add Household Member button to bring up the list of deactivated people for that household. With duplicates detected, a Merge button appears here as well (so you don't have to first re-activate before merging). Select the name in the Deactivated Household Members list and then click the Merge Button.

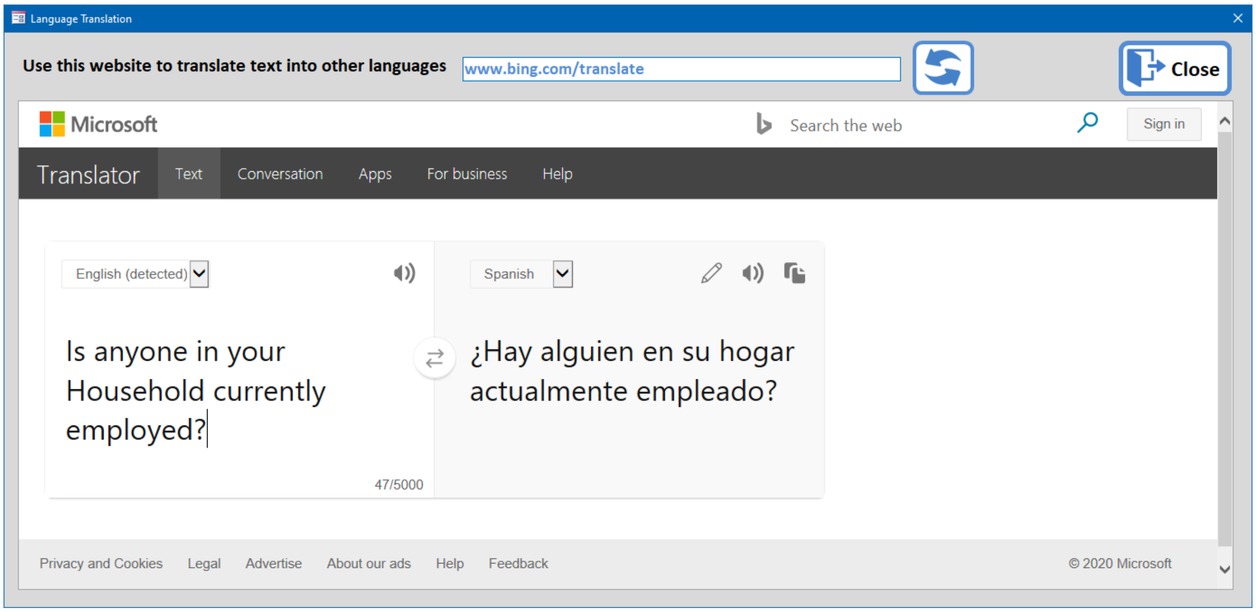
If there were visits/statistics for the person being merged, then this operation will have the following affects on reports:

- Unique People will be reduced by 1 for each merge operation (since the 2 people become 1).
- If there were any differences in data for Ethnicity, Race, Language, historical statistics will now reflect that of the remaining merged person.
- Other counts may also be affected depending upon when the merged person was created and the timeframe of the reports (e.g., "NEW" people would be reduced if both were created in the timeframe and now there is just the 1).

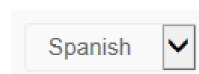
2.8. Language Translation Website

If a language translation website has been configured for your system, a Translate button will appear at the top of the main data window. Click it to bring up the web site.

Below is an example where www.bing.com/translate has been configured:

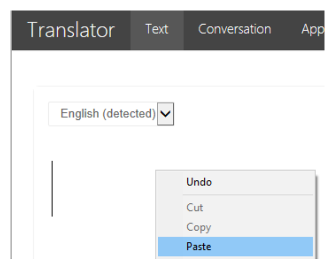


As you type English in the left-hand section, it gets translated into the selected language in the right-hand section automatically. You can change languages via the dropdown list above each section.

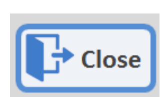


There's also a speaker icon that can be clicked, whereby the PC will then speak the translation for you.

TIP: you can click on any of the Household Questions on the registration screen to copy that question's text to the clipboard, so you then can paste it *(CTRL-V or right-click-paste)* into the English entry section.



When you are done, click the Close button to return to the Registration screen.



2.9. Accessing the Desktop

The software was written to use the entire screen, without the usual window title/borders (so it's not "movable", more of a "kiosk" application). An optional minimize button can be shown in the upper left.

If you don't want to minimize the program but still gain access to the Desktop and/or other applications:

- Press the Windows key *(between the CTRL and ALT keys on the keyboard)*. This brings up the taskbar and windows menu, allowing you to then launch another program.

- While holding down the ALT key, cycle through running programs with each press of the TAB key … then let go of the ALT key to bring that window to the front.

3. Pre-Registration System

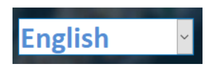
In an effort to reduce the time needed to register new families, a Pre-Registration is available, allowing Patrons to enter their own info prior to a final Registrar's review. Multiple systems can be active at a time, allowing for multiple new households to be entering in their data simultaneously.

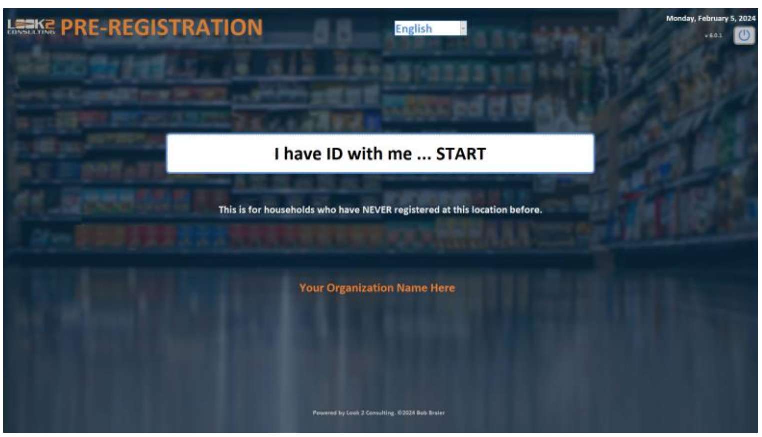
Registrars then simply review the data already entered, rather than having to conduct the full interview process directly. It's especially helpful when the new patrons do not speak English, as the prompting for household information can be in an alternate language.

3.1. Self-Registration Kiosk Program

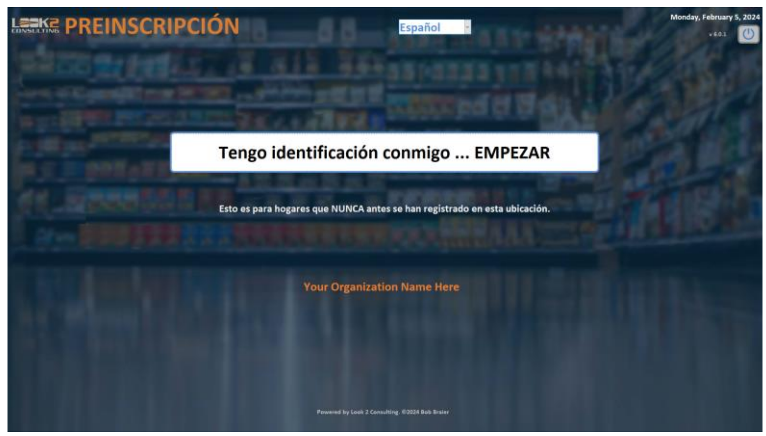
The program (Look2_PreReg.accde, or the one with x32 for 32-bit Office installations) works on a Windows tablet (1920x1080 or 1920x1200 resolution), with the system using large entry fields and the bottom-half of the screen reserved for an on-screen virtual keyboard. It can also work on a Windows laptop or PC.

The system comes up in English by default, but it can switch to an alternate language using the dropdown list at the top of the screen. *(The text used can be configured, per Section 4.3.14.)*



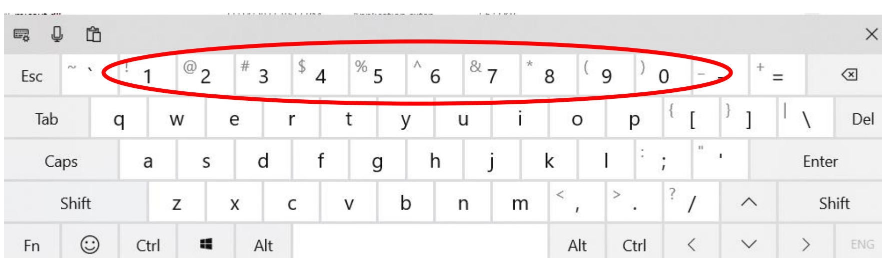


Home Screen in English

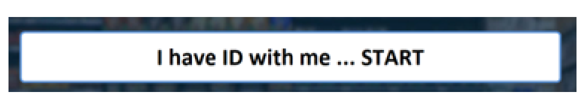


Home Screen in Spanish

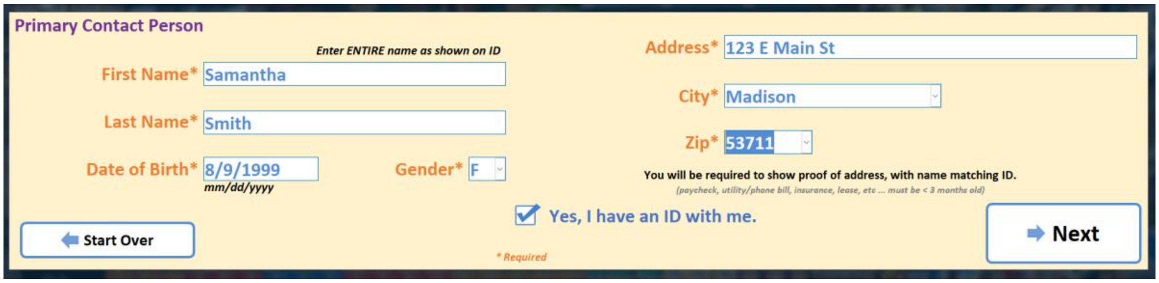
TIP: if using a tablet without a physical keyboard, choose a virtual keyboard having numbers always visible. This will make entering date of birth, phone number and address easier for the patron.



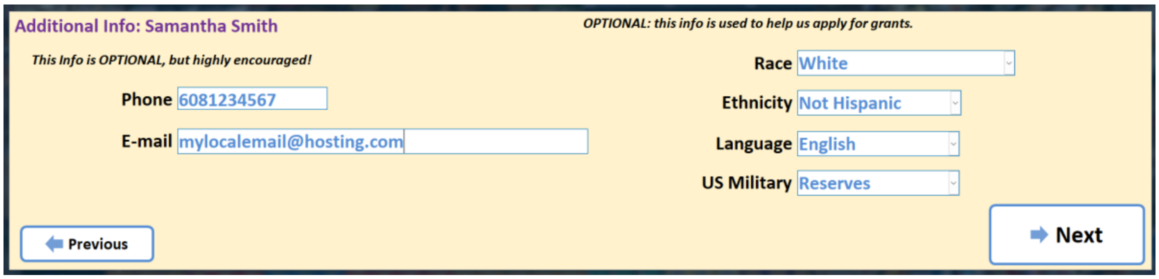
Clicking the "I have ID with me … Start" button initiates the data collection process.



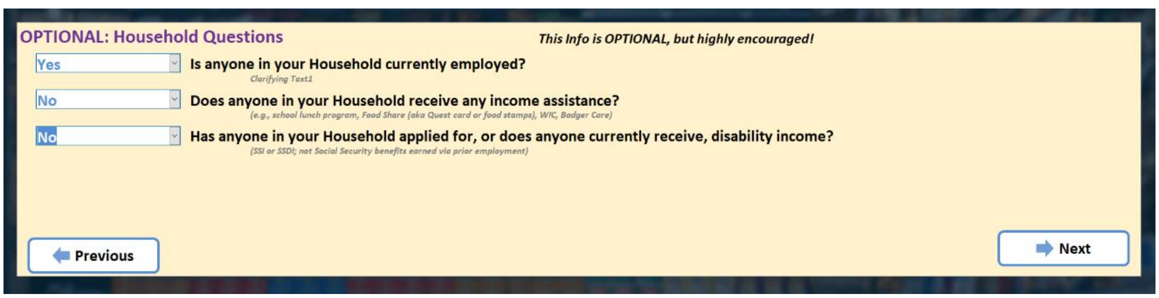
The software first prompts for the required fields for the Household's Primary Contact person:



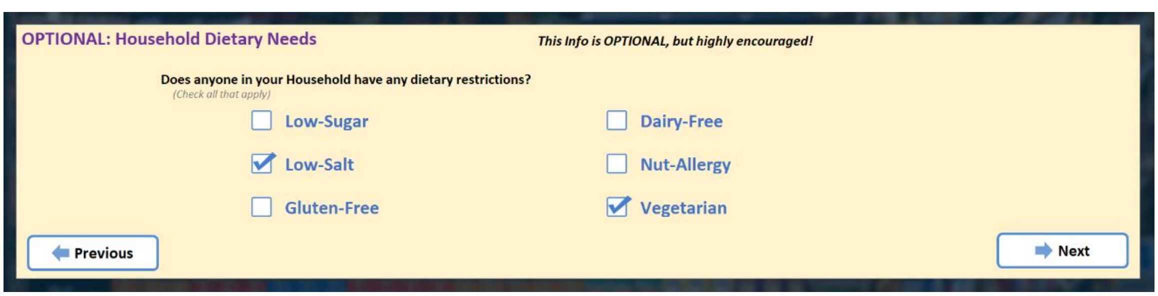
It then asks for the additional information for that primary contact (optionally, Ethnicity may be hidden):



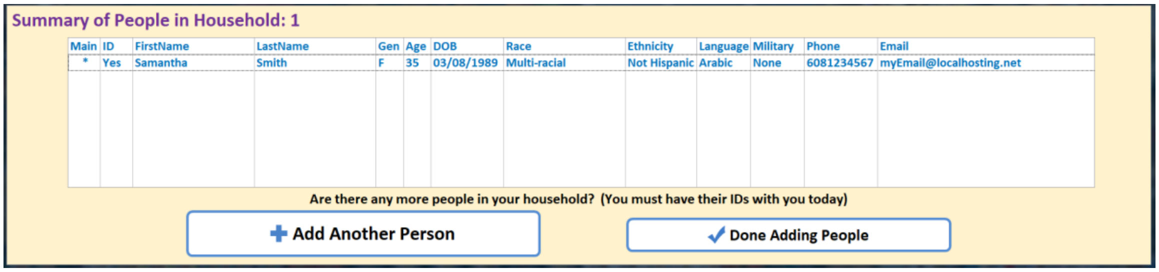
It then shows the Household Questions (if there are none, this screen is skipped), followed by another screen with the Personal Questions (also skipped if none are defined).



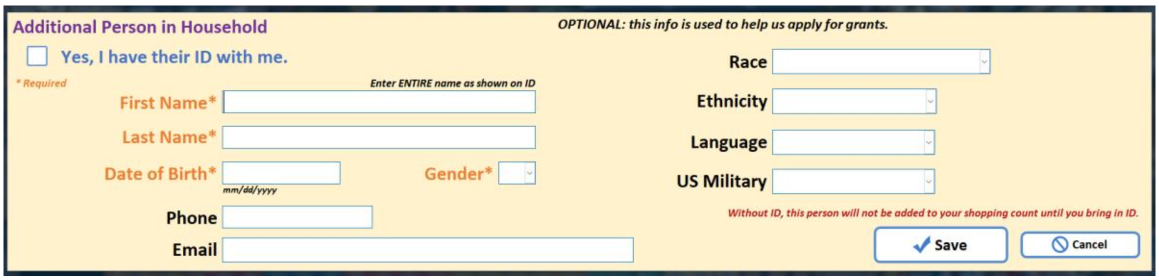
Next, the Dietary options are presented, but only if configured for your organization (you can disable this screen via the configuration parameter *"Show Dietary Restriction Options"* per Section 6.3).



When done, it shows a summary of that primary person, and presents an option to either Add Another Person, or specify they are Done Adding People.

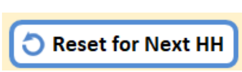


If adding another person, all fields are presented on just one screen (optionally, Ethnicity may be hidden).



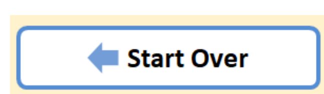
When finished, the software instructs the person to wait to be called to the Registration desk (this message can be changed, both English and alternate language, per Section 4.3.14).

It also plays the Windows System Tada sound, to help alert registrars that the entry has been completed.

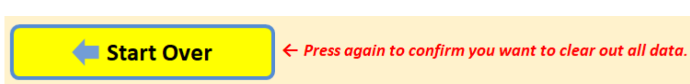


Reset the system via the Reset for Next HH button.

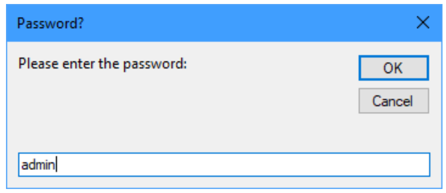
The system can then be handed to the next patron waiting to pre-enter their household information.



NOTE: the software only saves the data after the primary person has gone through the initial screens. Prior to that, the user can back up all the way to the first entry screen and, if they press the Start Over button, they can delete all data they've entered, with nothing saved for importing. The user is prompted to ensure that is what's desired, and they must press the button a second time to confirm.



To completely exit out of the pre-registration software, **double-click** on the Power button **2 times in a row** (looks grayed out on purpose … "secret/hidden" method so patrons don't accidentally exit out of the system). A dialog window will pop up asking for the password.



Enter "admin", and click OK to close out of the software. *(If an inccorect password is entered, the software simply beeps, and you must again double-click the power button 2 times to intiate this process again).*

3.2. Importing Data into Main Registration System

The data entered into the PreRegistration system is actually stored in a separate back-end database. It must be imported into the main Registration software in order for those households to be processed.

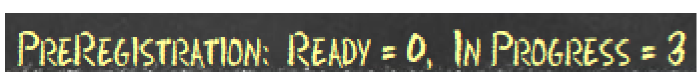
If the *Allow PreRegistration Import* setting is set to *True* for any given PC workstation, a PreReg button appears on the main screen of the Registration software once a registrar has logged in (and they don't have their Role set as Express).

3.2.1. PreRegistration Status

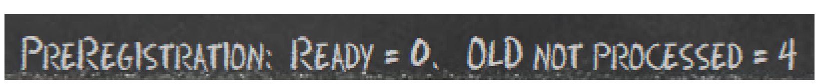
The bottom of the chalkboard shows a status if there are people ready to be imported for today (or if there are households not yet processed from previous days), examples of which are shown below:

If there are any entered today that are ready for import, it's green:

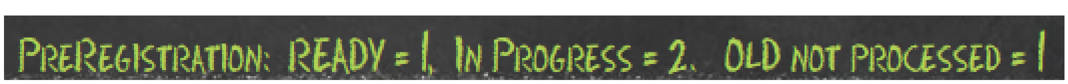
If there are some today that are in progress but none yet ready, it's yellow:



If there are none today pending, but some from before today not yet processed, it's gray:

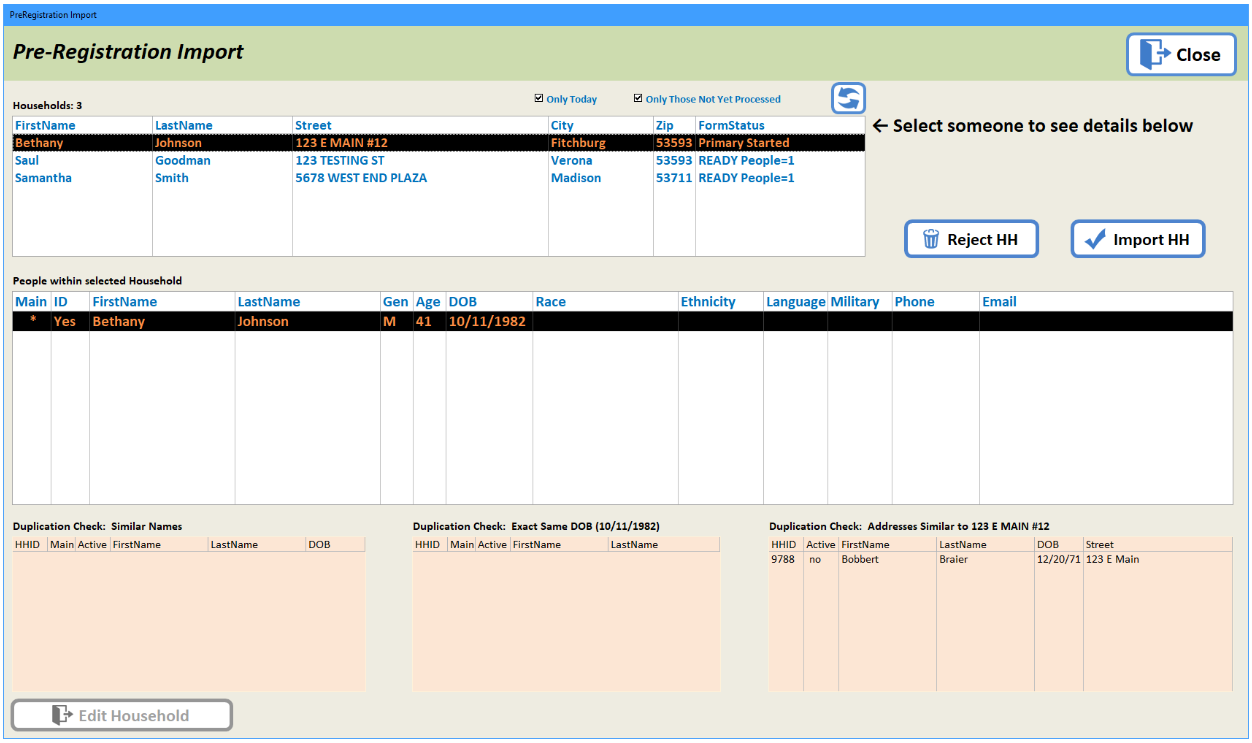


It can show all 3 *(the example below is green since there is at least 1 that is ready for today):*

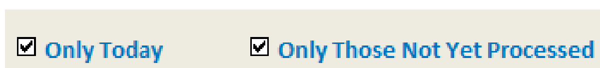


3.2.2. PreRegistration Import Window

Click the PreReg button to bring up the Pre-Registration Import window.



By default, the top table only shows entries for the current day, and only those not yet processed (imported or rejected). These options can be changed via the checkboxes at the top of the screen.

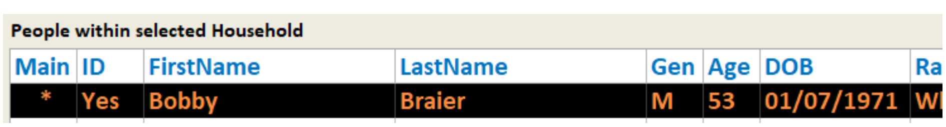


There is a refresh button at the top of the screen which refreshes the top table (to see updates in the FormStatus if waiting on someone to finish).

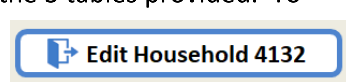
The FormStatus column changes, depending upon where the person is within their data entry:

- **Primary Started:** primary person has entered name/address, but not yet finished their own entry
- **IN PROGRESS:** Primary Person has finished their entry but is still adding other household members
- **READY:** Once they click the Finished button (and thus there are no more people to be entered)

Select a name in the top table to see details for each person in that household.

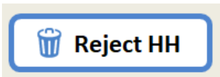


The software performs "Duplication Checks" to help ensure this household isn't already in the main system. Any potential duplicates are shown at the bottom of the screen in the 3 tables provided. To instead jump to one of those existing households, select one in those duplicate-check tables and press the Edit Household button at the bottom of the screen.

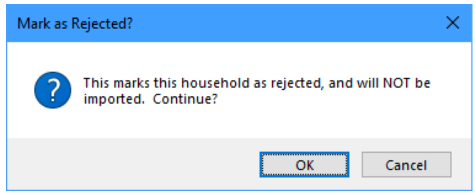


3.2.3. Import or Reject

For each household in the main list, the Registrar can either Reject or Import their data.

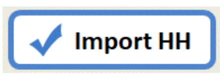


If the registrar determines this household is indeed a duplicate, or there's some other reason to reject their entries from being imported into the main database, click the Reject HH button. A confirmation dialog is presented prior to marking it as rejected.



Once rejected, the FormStatus field for that household gets marked as "REJECTED" along with the registrars initials, and will not be shown in the pending households list *(unless the Only Those Not Yet Processed box is unchecked)*.

REJECTED (BB)



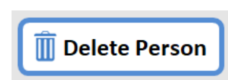
If the registrar determines this household is unique and should be imported into the main registration database, click the Import HH button. All of the household information and patron information for each person pre-registered will be brought into the Registration system as a new household, and the normal Household Registration Screen will be brought up. Other operations can thus resume with this new household (e.g., adding notes, adding today's visit, printing ID Cards, etc.)

Once imported, the FormStatus field for that household gets marked as "IMPORTED" along with the household number they were assigned within the main registration system, and will not be shown in the pending households list *(unless the Only Those Not Yet Processed box is unchecked).*

IMPORTED as HH 9802

NOTE: if you want to import some, but not all, of the people entered:

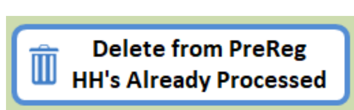
- import them all, per above
- edit the person(s) to be deleted from the Household Members list within the newly created household and use the Delete Person button prior to adding Today's Visit (see Section 2.4.6)



3.2.4. Admin Cleanup

As noted above, once households are processed (Imported or Rejected), they are marked as such in the PreReg database. The entries are NOT deleted, so that reviews of the import process can be conducted. Old/processed entries can be cleaned up (deleted) by an administrator.

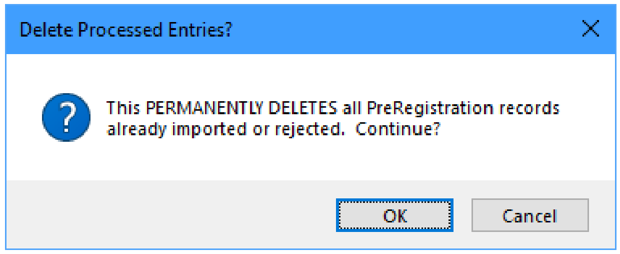
If logged in as a Registar having a role as Admin, an additional button appears at the top fo the PreReg Import screen.



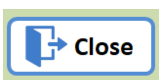
Use it to delete from the PreReg DB those already processed.

To review entries Imported/Rejected prior to pressing the button, uncheck both boxes at the top of the screen.

A dialog confirms the action prior to deleting those processed records.



These deletions are permanent within the Look2_PreReg_DB database and cannot be undone. This does NOT affect the main Registration database: those imported remain in the main system, this only deletes them in Look2_PreReg_DB.



To exit the Pre-Registration Import screen, click the Close button.

4. Administrative Functions

There are a number of administrative functions, available to Registrars whose Role is “Admin”.

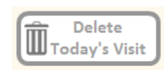
NOTE: in addition to the Admin-only functions described in this section, people assigned the Role of Admin also have full access to the rest of the Registrar functions. They can therefore register patrons, etc.

4.1. Custom Visit Date

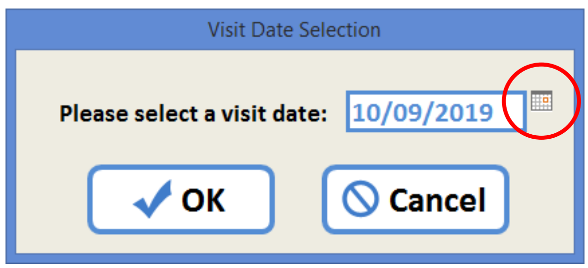
Admins have the ability to change the date when adding a visit. A calendar button appears to the left of the “Add Today’s Visit” button.

NOTE: there’s an option to enable this for ALL Registrars.

The date must be changed BEFORE adding the visit to the household record
(if a visit was accidentally added before the date change, simply press Delete Today’s Visit).

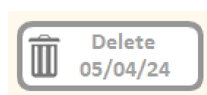


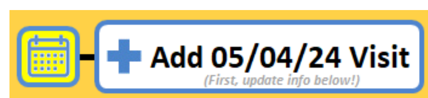
Click the Calendar button (next to the Add Visit button) to bring up a date selection dialog.



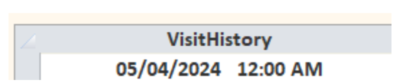
Either type in a new date, or use the little calendar control that appears to the right of the date entry field to select a date from a pop-up calendar. (Tip: if year is omitted, the current year is assumed ... saves typing).

If a date other than “today” is chosen, the Add and Delete visit buttons have their text changed to reflect the date selection, and the Calendar button background turns yellow (as an extra visual that the date is other than today).

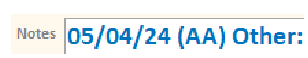




The timestamp used in the Visit History is set to 12:00:01 AM (thus serving as a flag in the history table that the date was overridden).



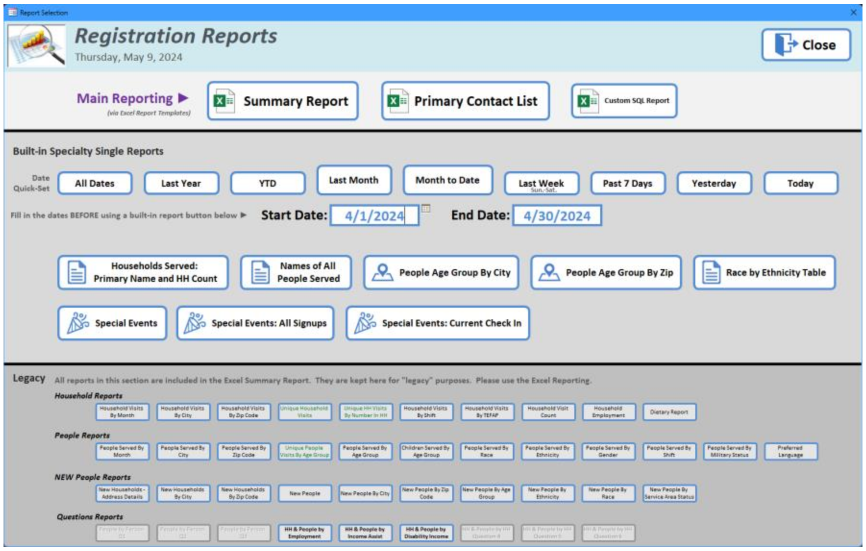
This date also gets used by the Custom Note Icon, Birthday, and Quick Note buttons, so any notes added match the back-dated visit.



An override date selection remains in effect until you go all the way back to just viewing the main login screen. This enables you to find then update multiple households using the same back-dated selection.

4.2. Reports Button

On the home screen, the Reports button becomes enabled for Admins (and Registrars whose role is “Reports”). Clicking it brings up the Reports screen. Because this is a much more in-depth topic, see Chapter 5 for the details on Reports.



4.3. Admin Button

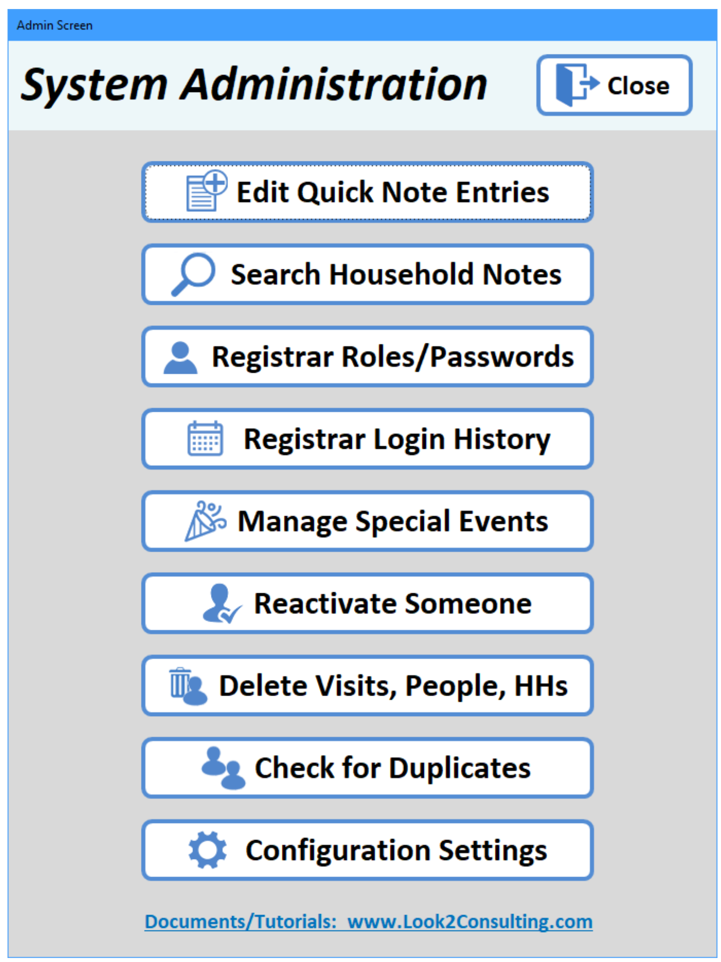
On the home screen is an Admin button.

Note: this Admin button is disabled if the signed-in user is not an Admin.

Clicking it brings up the Registration System Administration screen, a snapshot of which is shown to the right.

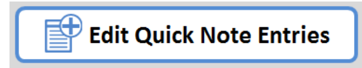
The various functions of the buttons are described in the next sections.

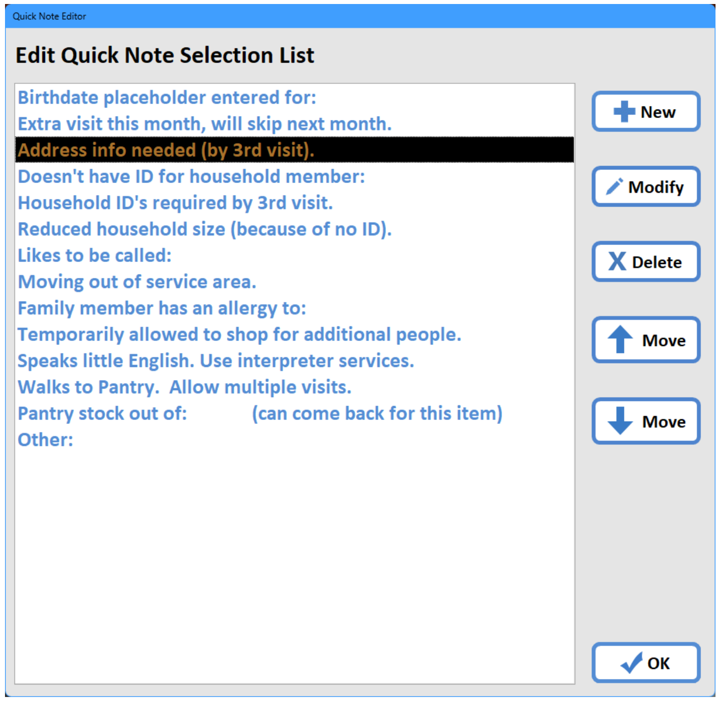
At the bottom of this screen is a link to the Look2Consulting website, where you can find documents and tutorials on this software.



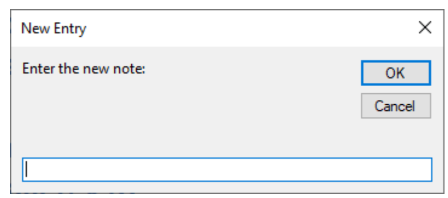
4.3.1. Edit Quick Note Entries

The Administrator can edit the Quick Notes that are available when using the Add Note to a household feature. Simply click the Edit Quick Notes Entries button in the Admin Screen.





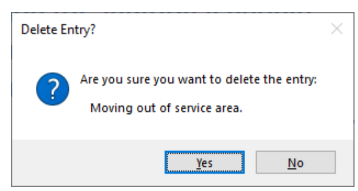
Press the New button, then type in the desired text, to create a new entry for the list.



Please try to keep the entries short. The width shown in this dialog's list is approximately the width of the notes field in the household data screen. If you enter text that is longer than this width, it will work but will simply break into multiple lines within the household's note section.

If there are more entries than can fit on the screen, a scroll bar appears.

Select an existing entry in the list and the Modify and Delete buttons will become active, allowing for editing of that entry.

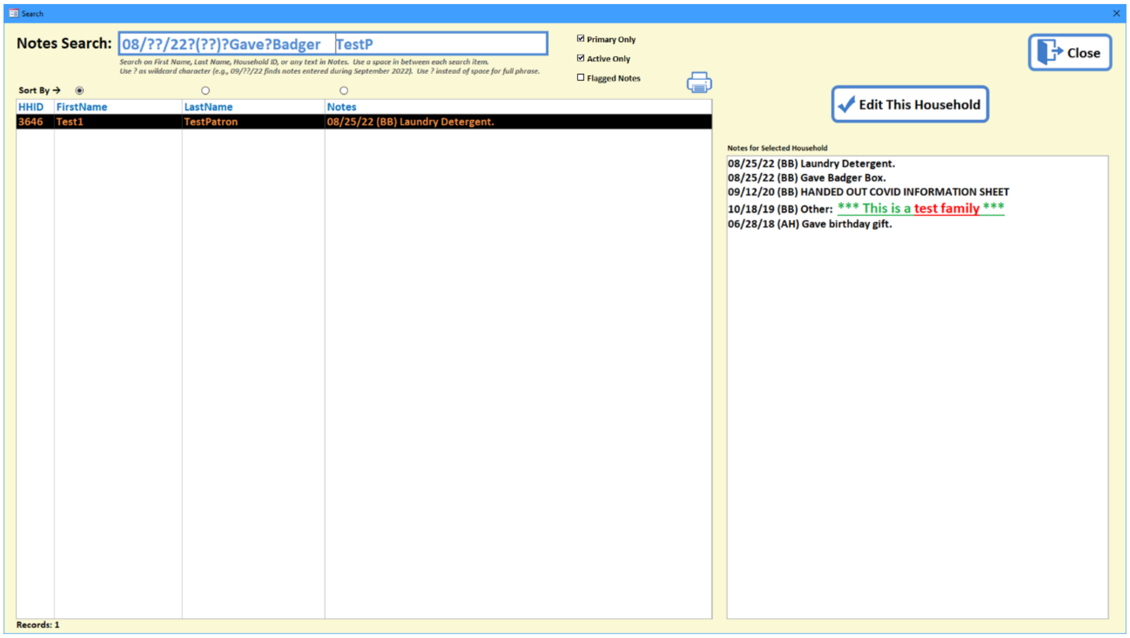


You can also change the order of the notes by selecting an entry and using the Move Up/Down buttons.

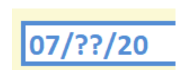
Suggestion: you may also wish to keep the "Other:" at either the top or bottom of the list so it's easily accessible.

4.3.2. Search Household Notes

The Administrator can search text within the household notes. Clicking on the Search Household Notes button brings up the following window:

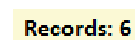


Enter a first or last name, a HHID, or text to search for within household notes (not case-sensitive).

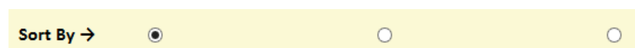


You can use ? as a single-character wildcard. For example, entering “07/??/20” searches for anyone with a quick note added in July of 2020. Since spaces are used to separate multiple search criteria, use this wildcard instead of a space if you wish to search for an exact phrase that contains spaces. Example: “09/??/22?(??)?Gave?birthday”

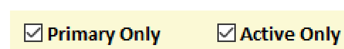
Search results update as you type. The # of matching records is shown below the table.



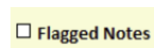
If there are many entries found, use the small circles above the column headers to change the sort order (to sort by FirstName, LastName, or Notes).



Results are Active Primary Contacts. Uncheck the boxes to change this.

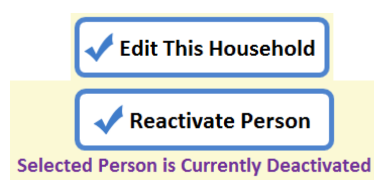


It searches “normal” household notes by default. Check the box to search Flagged Notes.

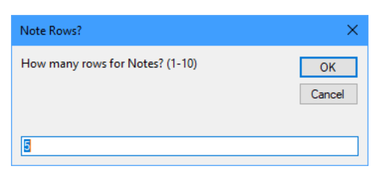


Click on a search result entry in the list to view the household notes in the right-hand table.

If the person selected is active, you may edit that household by either pressing Edit This Household, or simply double-clicking their entry. If the person is inactive, the Edit button changes to one allowing you to reactivate the selected person instead.

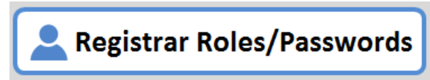


Press the Print button to bring up a printable report of the search results. It prompts for how many rows of notes to show per entry (1-10). Right-click on the report to bring up a pop-up menu of print/save options (see Section 5.3.3 for additional menu details).

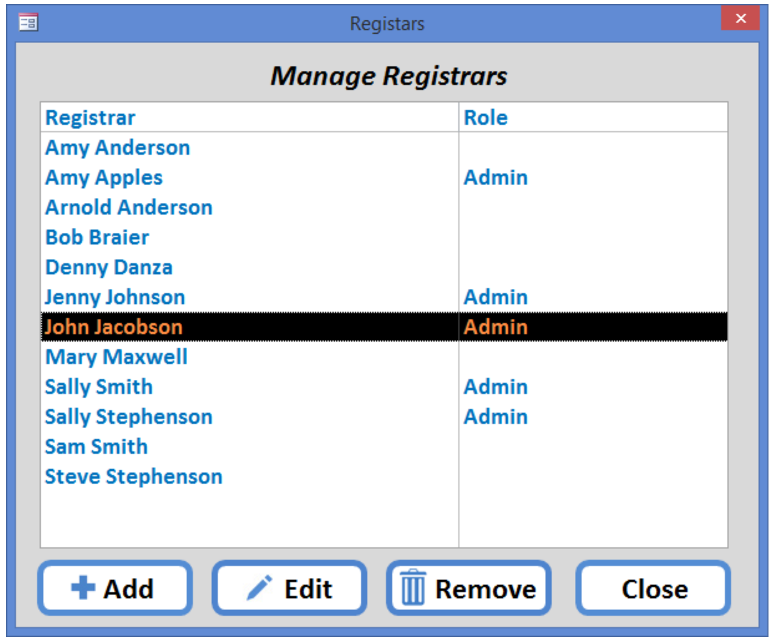


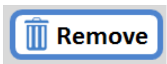
Click the Close button (or press the ESC key) to close this window and return to the Admin Screen.

4.3.3. Manage Registrar Roles/Password

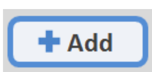


The Administrator can edit passwords and role of existing Registrars, add new Registrars and delete them from the system. To access these features, press the Registrar Roles/Password button in the Admin screen.

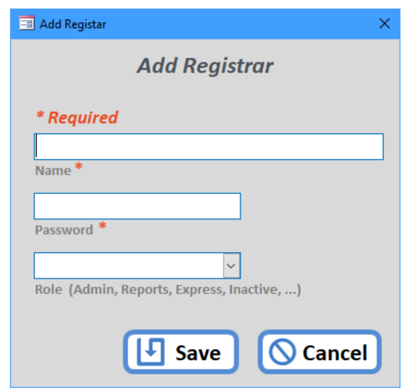




To remove a Registrar, select their name from the list and press the Remove button. It will ask for a confirmation prior to deleting. NOTE: this button is grayed-out/disabled if no one is selected.



To add a new Registrar, press the Add button. The Add Registrar window is displayed.



Enter in the first and last name of the new registrar (required).

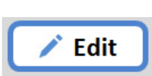
Enter in the password. They are case sensative. There are no restrictions on complexity (i.e., number of characters, whether to use numbers/symbols, etc.), as this is left to each organization to decide.

Finally, assign a role ... though this field is optional. The only "special" roles are "Admin", "Reports", "Express", and "Inactive" (selectable from the drop-down list).

NOTE: *Inactive* role hides that person's name from the Sign In list, making it so they cannot log in.

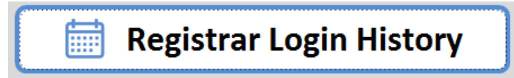
You can actually type in any other text as a role (e.g., "Registrar" or "Volunteer", or you can simply leave it blank. Such users will be treated as a normal registrar (without access to Reporting nor Admin functions). This allows you to categorize different people within the registrars if so desired. You may either select the role from the dropdown list (it pre-populates with all previous entries for Role), or type in your own.

When done, press the Save button.

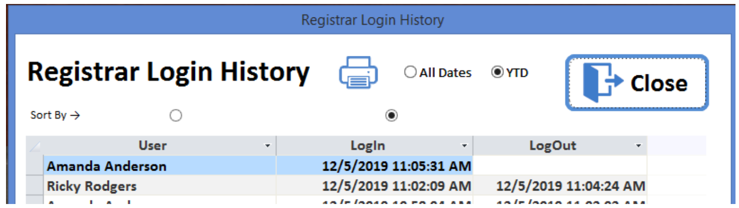


You can also edit an existing Registrar's name, password and/or role by first selecting them in the list and then pressing the Edit button.

4.3.4. Registrar Login History

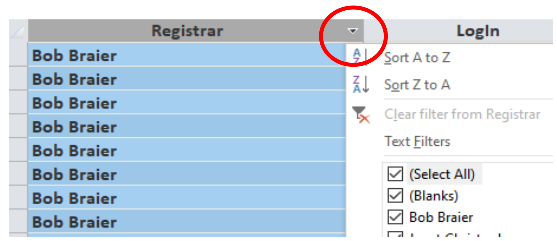


The Administrator can view the login history of Registrars. Simply click the Registrar Login History button in the Admin Screen.



Choose to show entries for all dates, or just the year to date, with the options at the top of the window.

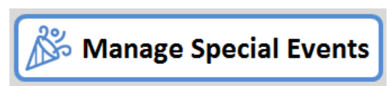
You can sort by time (the default) or by name by clicking on the circles above the column headers.



Click on the small down-arrow in the Registrar header if you wish to filter/sort the list further.

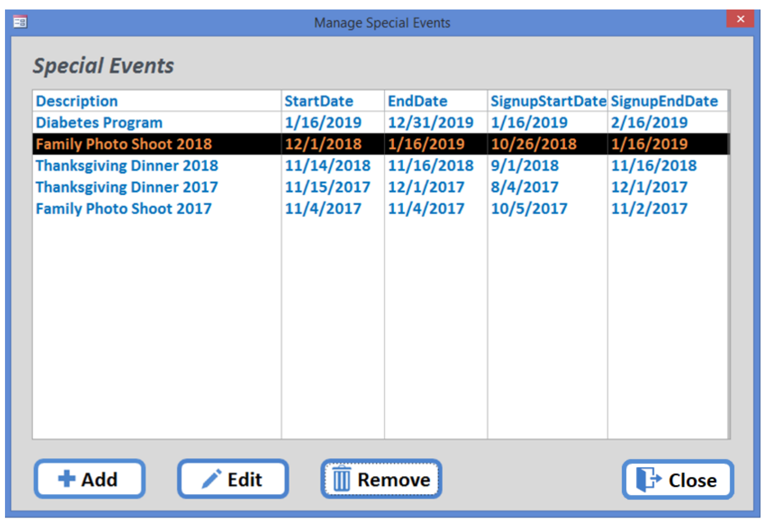
Clicking the print button sends the report to your computer's default printer.

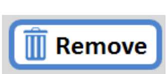
4.3.5. Manage Special Events



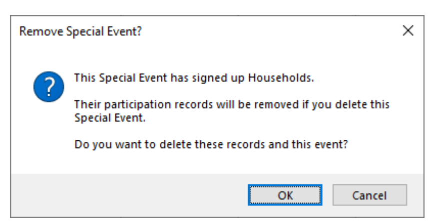
The system allows for Special Event signups. These can be created/modified by pressing the Manage Special Events button in the Admin screen.

A list of all defined events, past and present, is shown.

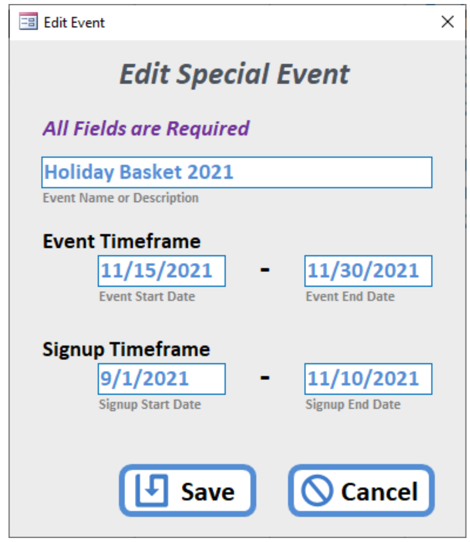




To remove an event, select it from the list and press the Remove button. It will warn you if there are people signed up for the event prior to deleting. NOTE: this button is grayed-out/disabled if no event is selected.



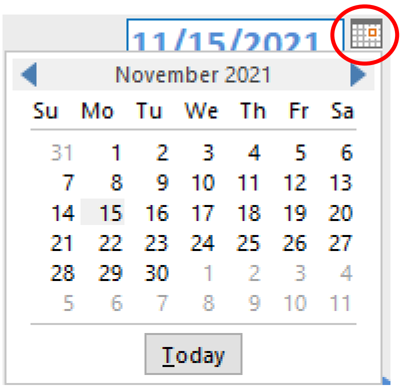
To add or edit an event, press the Add or Edit button.



The Add/Edit Special Event window is displayed.

Specify the Event Name/Description. Because events tend to repeat every year, it is strongly suggestion you use the year in the description.

Next, type in the start/end dates for the event. You may also click on the small calendar control icon that appears when a given field has focus, then select a date from the calendar.

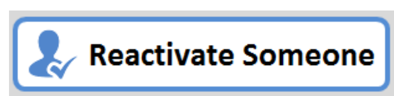


There are also fields for the start/end dates specifying the timeframe for when signups are allowed.

Press the Save button when finished.

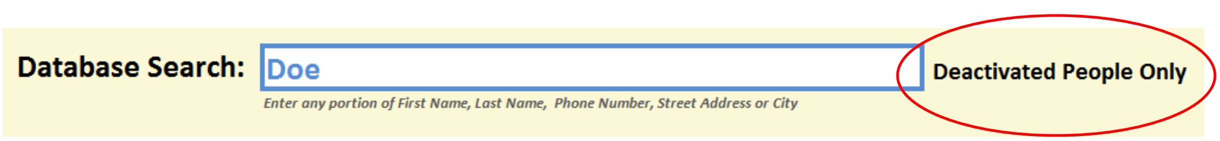
4.3.6. Reactivate Someone

In the previous chapter, the Reactive feature was described. In addition to using the normal Find feature to access reactivation, there is also a Reactivate Someone button in the Administrator section.



Pressing it brings up a modified Search window.

It is the same as the "normal" Find operation, with the exception that this ONLY searches for people who have been Deactivated.

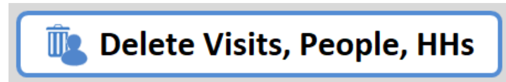


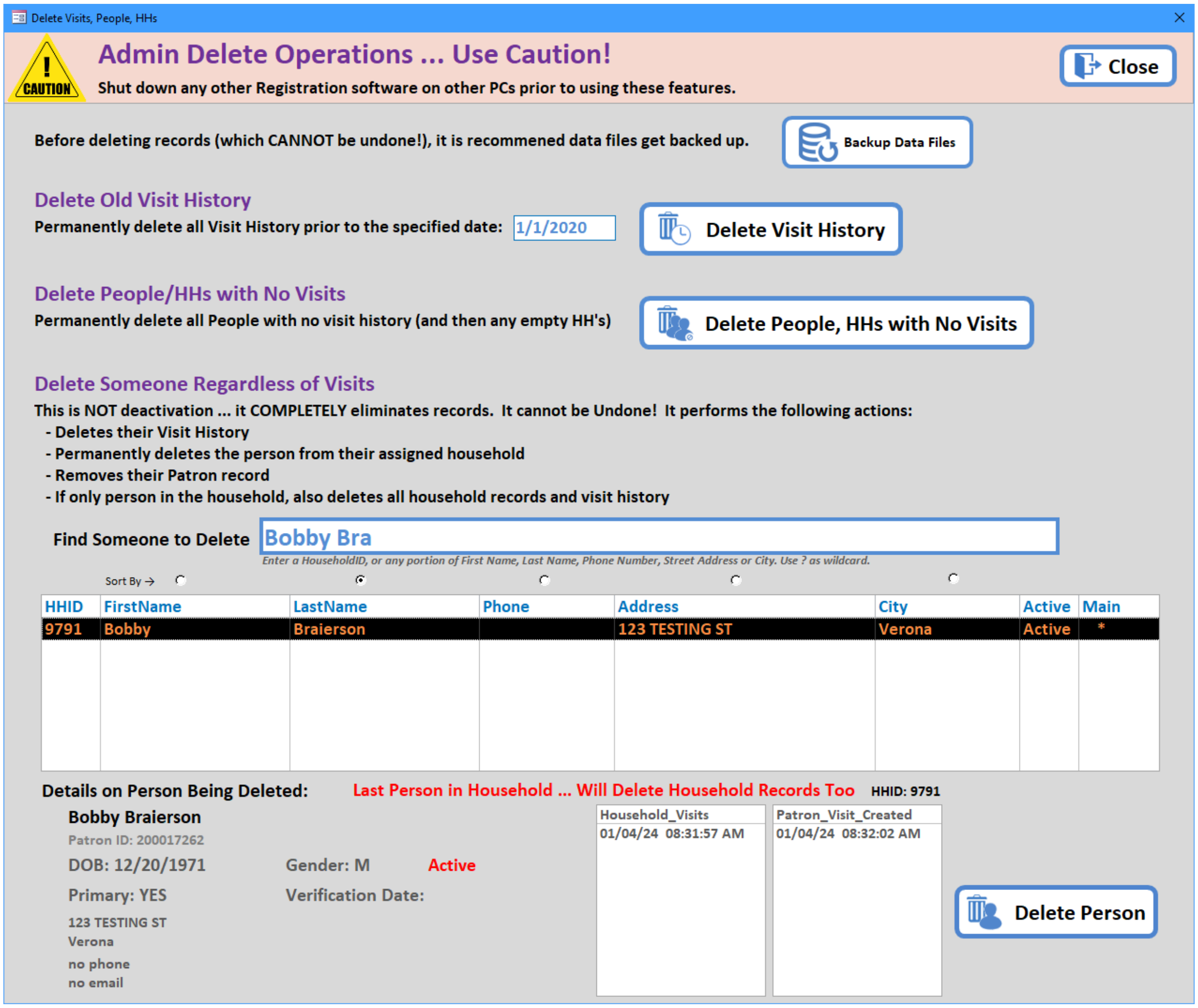
For details on the Reactivation process, see section 2.5.

4.3.7. Delete Visit History, People, Households

Normally people should not be deleted from the system ... rather they should simply be deactivated. That way their historical records and visits remain intact.

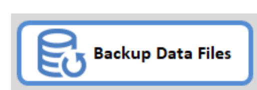
However, there are some instances whereby it is desired to truly delete someone from the system, or delete historical records and/or people without any visits. These functions are reserved for Administrators and can be accessed via the Delete Visits, People, HHs button.

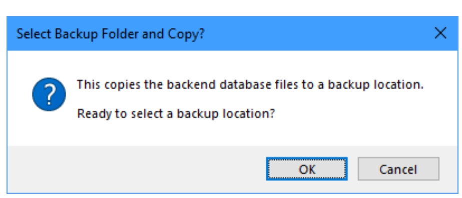




As is mentioned in the window header, it is important that all other Registration GUI programs running on other PCs be shut down. Only the currently running program should be connected to the databases.

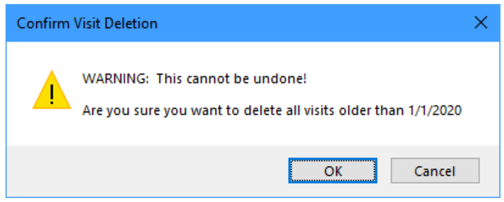
Also, before permanently deleting records (which CANNOT BE UNDONE!), it is strongly recommended that the data files get backed up. Simply press the Backup Data Files button and select the location where the files should be saved.



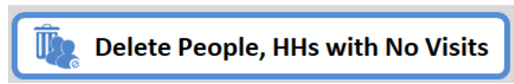


Delete Old Visit History

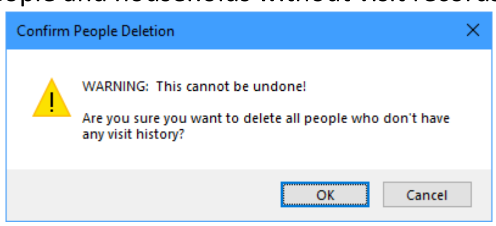
Pressing the Delete Visit History button will permanently delete all visit records (for both Patrons and Households) prior to the date specified. You are warned prior to it performing this action. Press OK if you want to forever delete old visit records.



Delete People/Households with No Visits



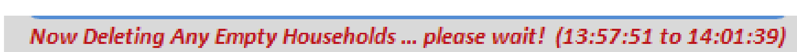
Pressing the Delete People/HHs with No Visits button will permanently delete all Patrons who don't have any visit history. It also then permanently deletes any Households which thus become empty. This is useful after you've eliminated old visit history, per the previous section. It thus clears out people who haven't visited your organization in a while. You are warned prior to it performing this action. Press OK if you want to forever delete people and households without visit records.



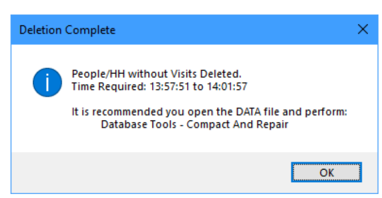
It then gives you yet another warning that it could take a very long time to complete the operations. For example, on a super-fast development machine, it took over 15 minutes to delete records for one organization. It could take even longer on slower machines! So please be patient! The cursor changes to a spinning hourglass, and it shows the start time of the operations just under the button:

You may think it's "hung" … but PLEASE WAIT! Call Look2Consulting if it is taking longer than 1 hour and you'd like to verify things are still progressing. Don't kill the task!

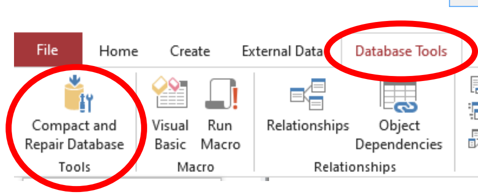
When it's done deleting people, it gives an update while it then deletes empty households. In the example below, the deleting of people took approximately 5 minutes:



When it's done, a dialog shows the total time taken, as well as a reminder to Compact and Repair the DATA file.



Exit out of the Registration software, open the *Look2_Registration_DATA.accdb* file, and choose Compact and Repair from the Database Tools menu.

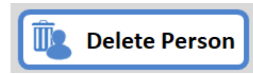


Delete Someone Regardless of Visits

Search for the person you wish to delete and select them in the table. The software shows details for the selected person, helping to make sure it's the correct person.

If the person is still active, that fact is shown in red ... serving as a caution about deleting someone who is considered an active participant.

Clicking the Delete Person button eliminates the Patron and their Visit History.

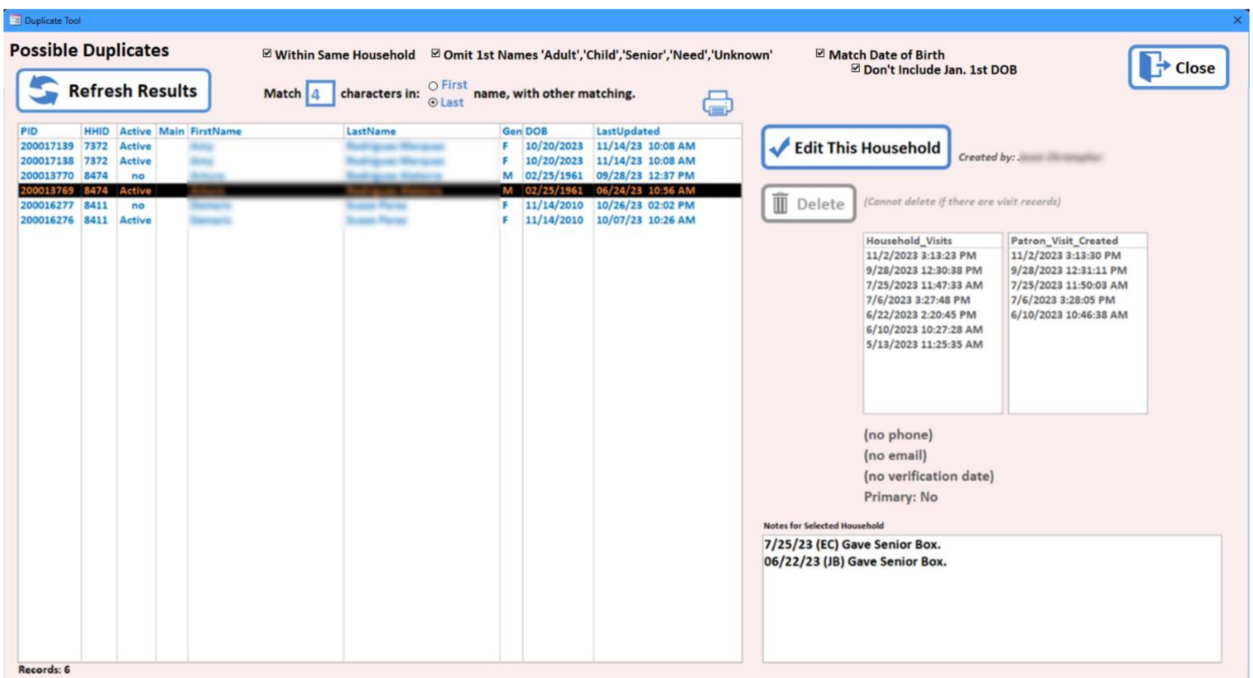


If they are the last (only) person in their household, a warning is also shown indicating that the Household records (visit history, address, dietary records, etc.) will also be deleted.

Please note: this function **CANNOT BE UNDONE!** Once deleted they are fully removed from the system.

4.3.8. Check for Duplicates

The Administrator can bring up a special window to help check for possible duplicate patrons. Simply click the Check for Duplicates button in the Admin Screen. *(The screenshot below has names blurred for confidentiality)*

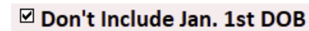


The software looks for either first names or last names that match, and then uses additional parameters to determine how much of the other name should match, if the people must be within the same household, and if they must have the same date of birth.

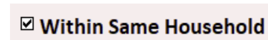
By starting with all option boxes checked, you can easily get a smaller list of possible duplicates which can readily be handled by selecting a name in the list, editing that household, then using the Merge feature to combine duplicates. (Details on using Merge are covered in Section 2.7).

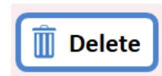
If you uncheck the “Match Date of Birth”, be aware that there may be duplicate names that are valid. For example, there could be a son with the same name as the father. So, use caution on merging any such entries.

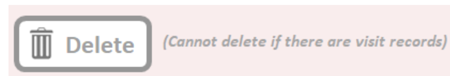
If you are matching DOB, there’s an option to exclude those on January 1st (which is used as the DOB placeholder). This option is disabled if not matching DOB.



If you uncheck the “Within Same Household” button, you may find duplicate people within different households. If one of them has no visit history, simply use the Delete button to completely get rid of that duplicate. However, if there is some history within that other household, the Delete button gets disabled, and you’ll instead have to edit the household and use the Move feature to move the duplicate into the other household, and then use the Merge feature to combine their records.







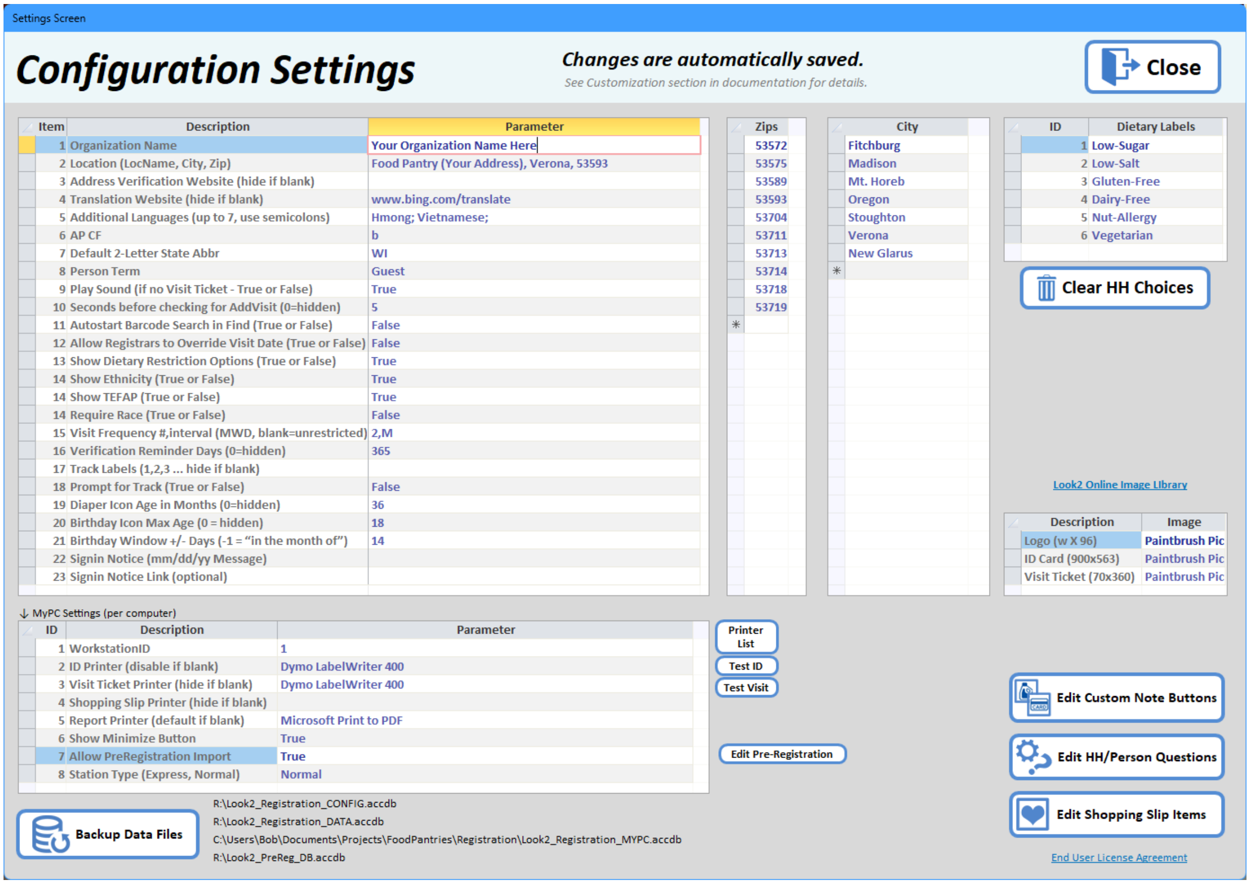
Changing the Match X characters entry helps catch misspelled names, selecting either the First or Last Name as the partial match. In the example shown, only the first 4 characters in the Last Name must match, with the First Name matching exactly.

- Smaller numbers yield more possible duplicates, though the chances of them being actual duplicates goes down.
- Larger numbers makes is such that short names must match exactly (e.g., if the number is 5, a 4-letter name like “Mary” must match exactly).
- For a value of 0, the selected name (First or Last) doesn’t have to match at all … just the other name must match exactly. Caution: first names may not match with exact same DOB for twins!

Press the Print button to bring up a printable report of the results. Right-click on the report to bring up a pop-up menu of print/save options (see Section 5.3.3 for additional menu details).

4.3.9. Configuration Settings

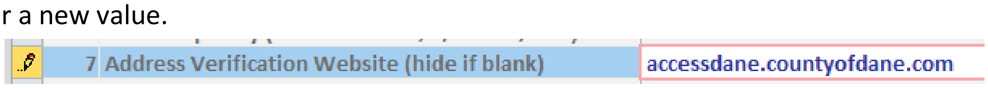
Administrators can edit parameters used to configure the system without needing to edit the backend Access tables. Click Configuration Settings in the Admin Screen.



Entries for various backend tables are show *(tblParameters, tblMyPC, tblZipCodes, tblCityNames, tblDietaryDef, and tblImages)*.

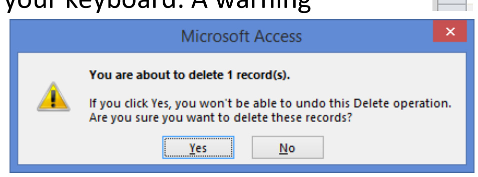
IMPORTANT NOTE: as pointed out at the top of the screen, all changes are saved automatically.

The first table shows the various parameters that can be adjusted to meet the needs of your organization. See Section 6.3 for details on each of the entries in this table. To edit one, simply click it and enter a new value.

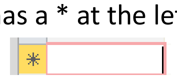


The same is true for the City Names and Zip Codes tables: simply type over an entry to change it.

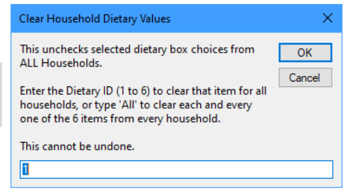
With these 2 tables, you can also delete a City or Zip Code: click on the small box to the left of the entry (selects the "row" in the table) and press the delete key on your keyboard. A warning message is shown.



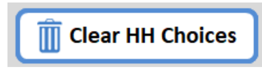
To add a City or Zip, click the last row (has a * at the left) and enter a new value.

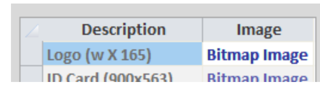


The 6 Dietary checkboxes under the household members table (see Section 2.4.8) can be changed to fit your organization's needs. Household answers to these choices are included in the Excel Report tool as well as the Dietary Report built into the program.



If you change one and thus wish to reset any existing answers, press the Clear HH Choices button. You will be prompted if you wish to reset just one or all choices.

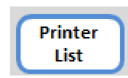


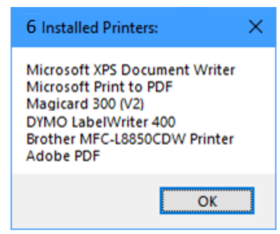


The Organization Logo and the ID Card background are stored in tblImages. To edit an image, double-click "Bitmap Image" in column 2 of the table provided. (Note: shopping slip footer and custom note icons are changed via their respective editors)

The software uses the Printer Names as defined in the table in the MYPC file, which can be unique to each PC in a multi-workstation environment. You must make sure the printer name entered is EXACTLY as it is defined for the PC (it's case-sensative!).

To help get the spelling correct, you can click on the Printer List button to bring up the names of printers configured for the PC.

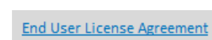




Tip: you can use CTRL-C while list is shown to copy all of the names, and then paste into notepad. From there, copy just the name desired and paste into the associated field within the Settings screen.

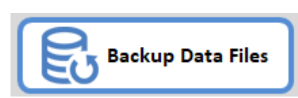
You can also send a test example to the ID and Visit Ticket Printers.

Within the Settings Screen, you can also view the End User License Agreement PDF by clicking the link at the bottom.



There are also buttons for editing the Custom Note Buttons, Household/Personal Questions, Shopping Slip items, and PreRegistration language strings, as well as backing up the data files, details of which are given in the next sections.

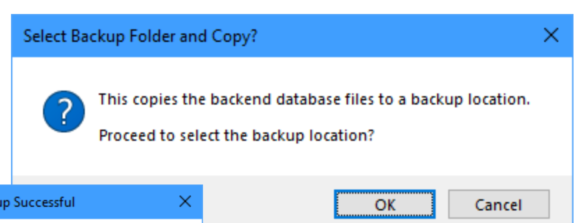
4.3.10. Backup Data Files



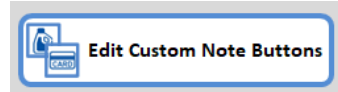
At the bottom of the Configuration Settings screen, the paths to the CONFIG, DATA, and MyPC backend database files are shown. You can click the Backup Data Files button to make a copy of the 4 ACCDB files.

After pressing OK to confirm you want to proceed with backup, select the drive/folder where the files should be stored. It may take a few seconds to then make the backup copies, so please wait.

The copy-date is appended to the name.



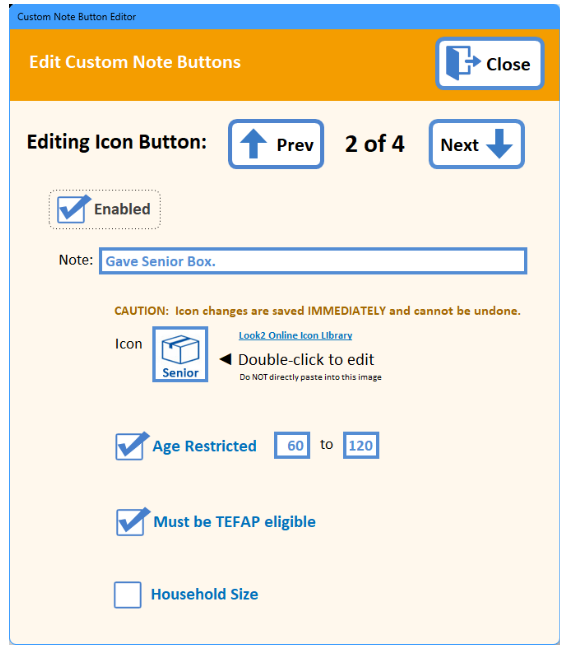
4.3.11. Edit Custom Note Buttons



From within the Configuration Settings screen, the Administrator can click Edit Custom Note Buttons to bring up a dialog to edit the 4 customizable buttons that appear above the household notes.

Use Prev/Next to cycle through the 4 buttons.

For each button:



- Check the Enabled box if you want to use it *(unchecking this allows the temporary hiding of a button when it should not be active)*
- Type in the note that will be entered into the household notes whenever the button is pressed
- The image used for the icon (60 x 60 pixels) is stored in the database, editable by double-clicking the icon image within this editor. This image is also shown on the Visit Ticket and/or Shopping Slip if the button is pressed to add the household note before the Visit is added. It's suggested that these icons be dark blue (so they follow the "click on anything that's blue" design, and yet look nice on a black-n-white printout). You can also include text within the image itself if that helps distinguish items.

  Click on the link next to the image to go to the Look2 Online Icon Library and see if any pre-made icons fit your needs (examples are shown to the right). Alternative, search the web for an icon and/or create your own.

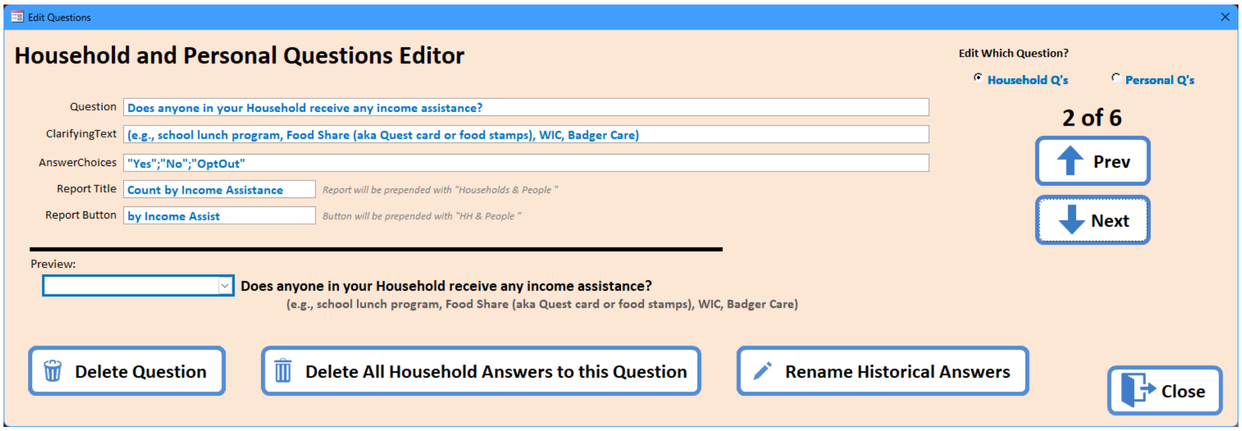
- Check the Age Restricted box if the button should be only shown if there are people in the household meeting an age criterion. Enter lower and upper age limits. For everyone at or younger than a certain age, set the upper to that limit and the lower to 0 (e.g., 0 to 18). For everyone at or older than a certain age, set the lower to that limit, and the upper to 120 (e.g., 60-120).
- Check the Must be TEFAP eligible box if the button should only be shown when the household is TEFAP qualified. If your organization has hidden the TEFAP feature, this checkbox setting is ignored.
- Check the Household Size box if the button should be only shown if there are X number of people in the household. Enter the lower and upper size limits desired.

There is no "Save" button, as changes are saved immediately.

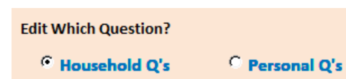
Click CLOSE when done editing the buttons.

4.3.12. Edit HH/Person Questions

From within the Configuration Settings screen, the Administrator can click the Edit HH/Person Questions button to bring up a dialog to edit the 6 Household Questions as well as the 3 Patron Questions.



At the top right of the screen, select an option to edit either the Household or Personal questions.

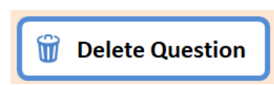


Then, use the Prev/Next arrow buttons to navigate through the questions.

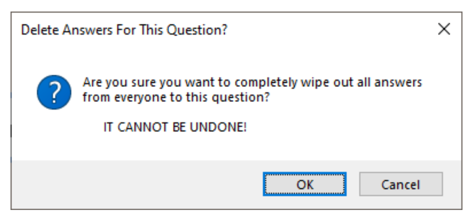
As you make changes to the entries, a preview of how it will look in the Household Data Screen is shown. This is especially helpful for the list of answer choices.

Details for each of these fields are given in Sections 6.7 and 6.8.

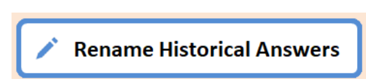
Clicking Delete Question clears out all text entries for the selected question.

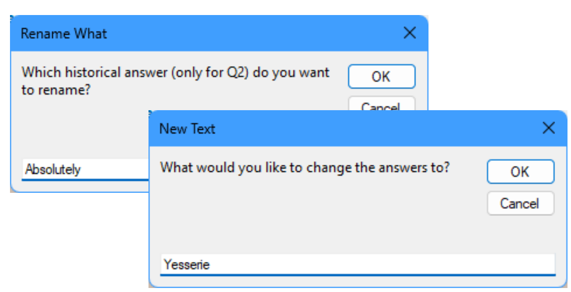


If you fundamentally change the nature of any given question, reset the answers for all households/patrons by scrolling to the changed question and pressing the "Delete All Household Answers to this Question" button. A confirmation dialog appears making sure you want to perform this operation.



If you are keeping the question and answers basically the same, but just want to "rename" a specific answer (e.g., misspelled, or perhaps a clearer wording choice), press the Rename Historical Answers button. It first prompts for the OLD answer that should be renamed. It then asks for the new answer. If both are entered, the software changes all historical answers from the old text to the new text. This way past answers will match your new re-worded choices.

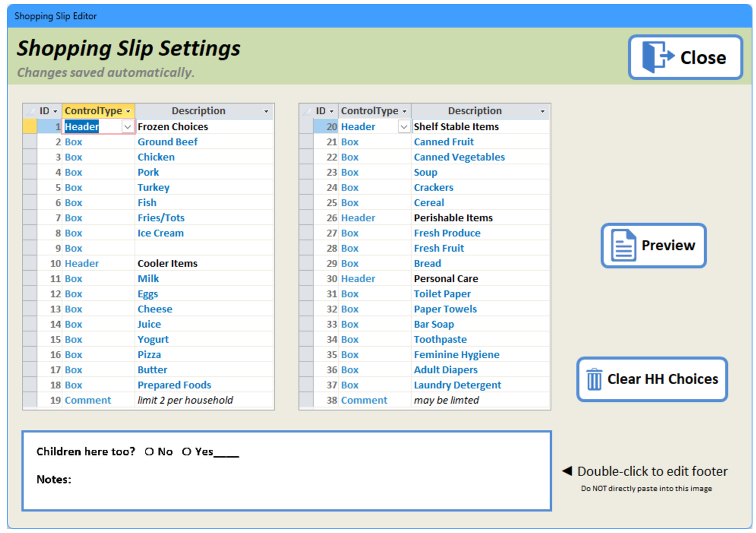




IMPORTANT NOTE: It is suggested you run reports with the old question and answers before you make changes to these items, and perhaps make a backup archive of the databases. Only after you are sure you have captured the "old" question/answer data should you delete/reset the answers for the households/patrons.

4.3.13. Edit Shopping Slip Items

From within the Configuration Settings screen, the Administrator can click the Edit Shopping Slip Items button to bring up a dialog to edit the choices/layout for the Shopping Slip.



There are 38 entries which can be configured to suit the needs of your organization's choices for personalized shopping.

Entries 1-19 appear in column 1 of the report, and entries 20-38 are in the second column.

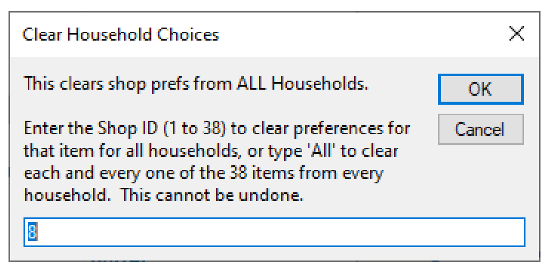
Each entry has a ControlType, which dictates how the entered text will appear on the form.

- Normal: regular font without a box
- Header: larger font, bold, no box
- Comment: italic, no box
- Box: makes it a choice that can either be marked as a favorite, or have a strike-thru

If an entry has no text in the Description column, that row will appear blank in the report (ControlType doesn't matter). You can thus use this to change the layout spacing.

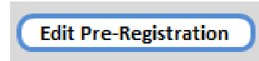
It's easiest to make a change and quickly see how the report is affected by pressing the Preview button.

The bottom footer for the shopping slip makes use of an image stored in the database. Edit it by simply double-clicking on the preview at the bottom of this editor.

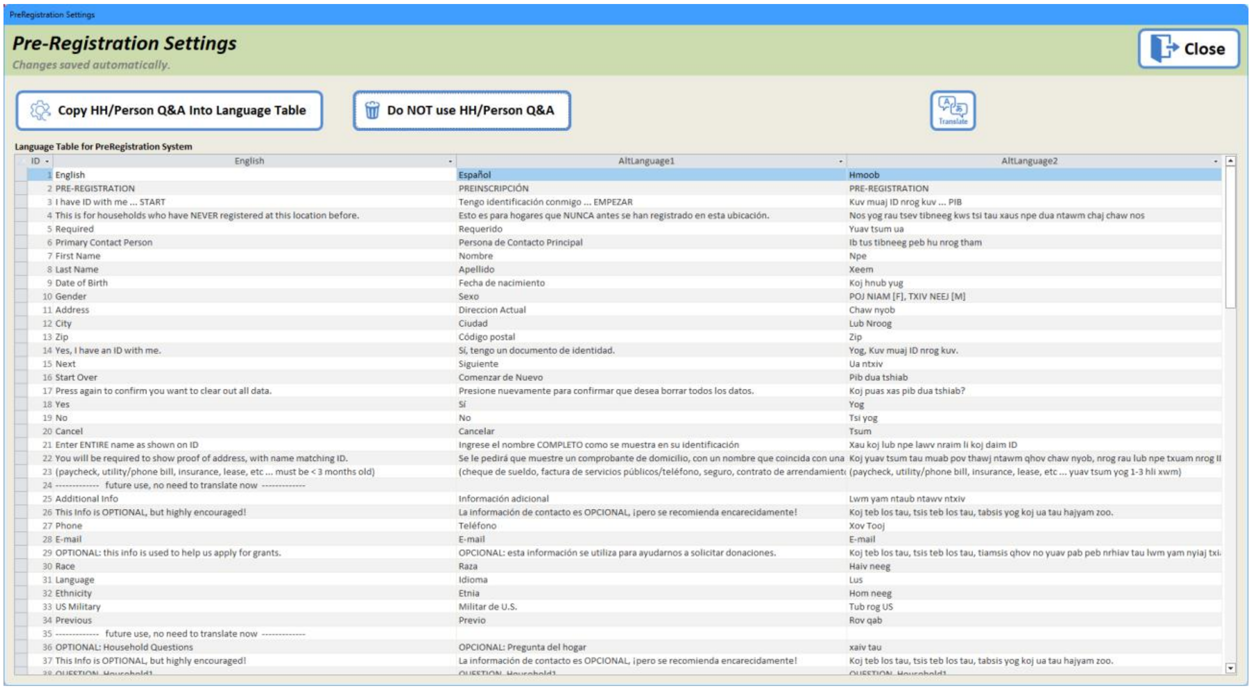


If you fundamentally change the nature of any given entry (as opposed to just fixing spelling or entering a synonym for what you already had in place), you should reset the preferences for all households/patrons for that changed entry. You can accomplish this by clicking on the row that is changed and pressing the "Clear HH Choices" button. A confirmation dialog appears making sure you want to perform this operation. It pre-populates the dialog with the row number selected. Please double-check that this is the correct entry you wish to clear, as the action cannot be undone. You can also type in the word 'All' and have the software clear all 38 preferences for all households.

4.3.14. Edit Pre-Registration



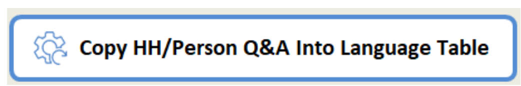
From within the Configuration Settings screen, the Administrator can click the Edit Pre-Registration button to bring up a dialog to edit the language strings used by that system.



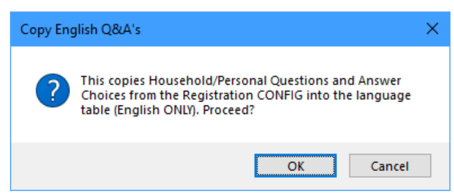
By default, the text has been translated into Spanish and Hmong. You can edit the individual entries, or change them all to a completely different language if so desired. If choosing a new language, make sure the language's name is in the first row.

NOTE: please confirm the accuracy of these translations for your situation prior to using the system!

The translate button helps facilitate translations. See Section 2.8 for details.

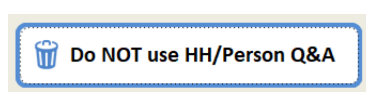


The Pre-Registration system asks Household and Personal Questions. If yours are different than what's initially shipped with the system, you can press the Copy HH/Person Q&A Into Language Table button, which replaces the English Questions and all the answers with what's configured for your organization. It does NOT change translated questions nor clarifying text … that is left for you to complete. You are given a chance to cancel the operation before proceeding.



Questions that begin with "QUESTION_" are considered blank and will be skipped.

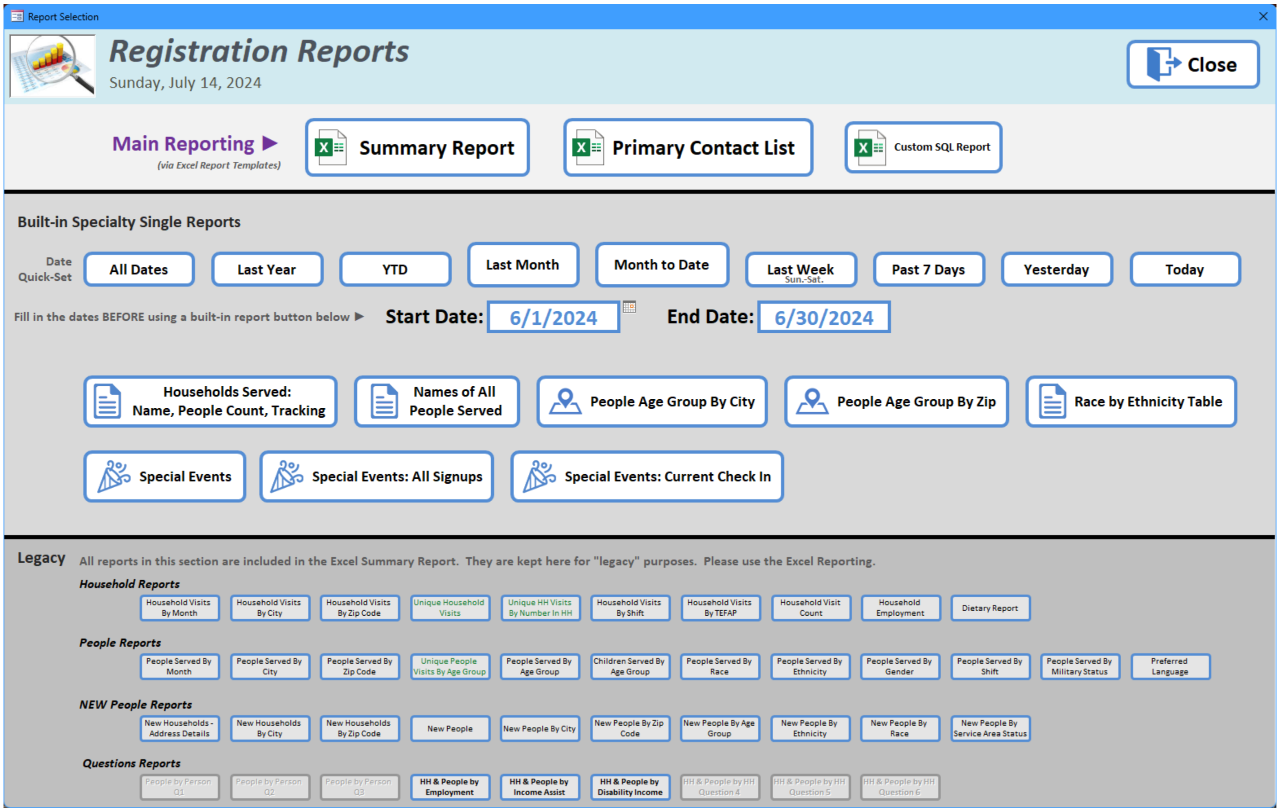
When translating, it is strongly suggested you keep Answer Choices in ENGLISH, so their answers will match what the main DB is looking for. (If you translate the answers, you'll have to translate back to the English answers after importing, or your reports won't tally correctly!)



If you don't want your questions used by the PreRegistration system (perhaps you want the Registrar to ask these in person), click the Do NOT use HH/Person Q&A button to reset them to default strings (which then hides them in the program).

5. Reports

Various reports are included with the system, accessible to Administrators and also Registrars having the role of “Reports”, via the Reports button (see previous section). The Registration Reports window appears:



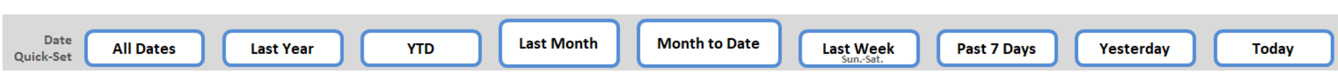
The main registration reporting is done via the Excel report buttons at the top of the Screen; these are described in greater detail later in this chapter. There are also built-in reports for the Special Events, as well as a few that are more “specialized” … older reports used by just one or two organzations. The bottom section has many of the old built-in reports which give only a single set of statistics. These are now included in the Excel Summary Report (the buttons are kept on this screen for legacy purposes). Some quick details on using these built-in reports are covered first.

5.1. Date Range

Each report provided uses the Start and End Dates shown near the top of the second section.

You can edit these 2 dates either directly (by clicking in the box and typing in new numbers), or by pressing the small calendar button that appears to the upper right of the entry field when it has focus (which brings up a pop-up calendar control).

You can also quickly set these 2 dates by using one of the of the “Quick Set” buttons provided:



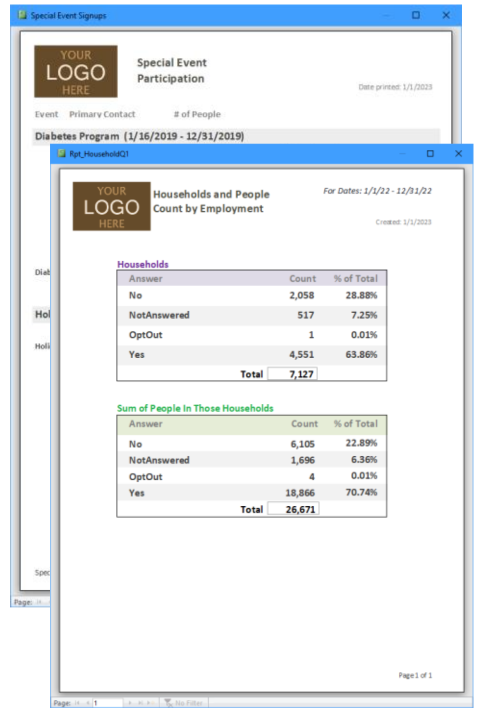
You can also first use the Quick Set buttons and then modify the dates, or any combination so desired.

The bottom line: when you press one of the built-in report buttons, it uses the date range specified.

5.2. Report Buttons

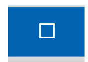
Below the date range are the report buttons. Some may be disabled (for example, if a Household or Person Question has not been configured for your site). You are encouraged to click on each one to learn what data they provide. For now, a quick overview of using reports is provided.

5.3. Report Content



Each report offers a different type of summary of the data within the selected time frame. Depending upon the button you select, the system issues a SQL Query to the database and pops up the results in a window that is in "Print Preview" mode.

NOTE: the reports in the Legacy section are consolidated into an Excel Spreadsheet using the tool described later in Section 5.4.

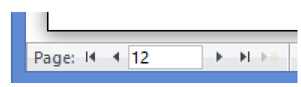
You can press the Maximize Window button  to view the report in a larger preview.

Each Access report has common elements.

5.3.1. Header

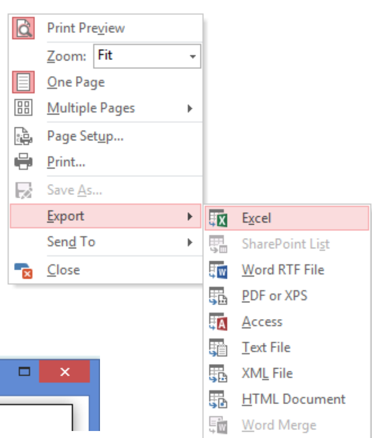
At the top of each report is a header which includes your organization's logo, the title of the report, the date range selected (if appropriate), and the date the report was created.

5.3.2. Data, Page Control



The body of the report contains the result of the query based upon which report was selected. If there is more than one page worth of information, there are page controls at the bottom of the report pop-up window to help you navigate among the various pages, including going forward/back a page, going to the first/last page, or entering a page number directly.

5.3.3. Print/Export



Print out a report by pressing CTRL-P on the keyboard.

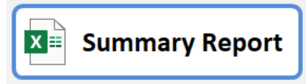
Right-click anywhere in the report's main page to bring up a menu of options. In addition to being able to select Print from this menu, you can also elect to Export the data into various formats, including Microsoft Excel, Microsoft Word, a PDF file, and other choices.

5.3.4. Close Report

When done viewing a particular report, close it using the window's close button in the upper-right corner of the window.

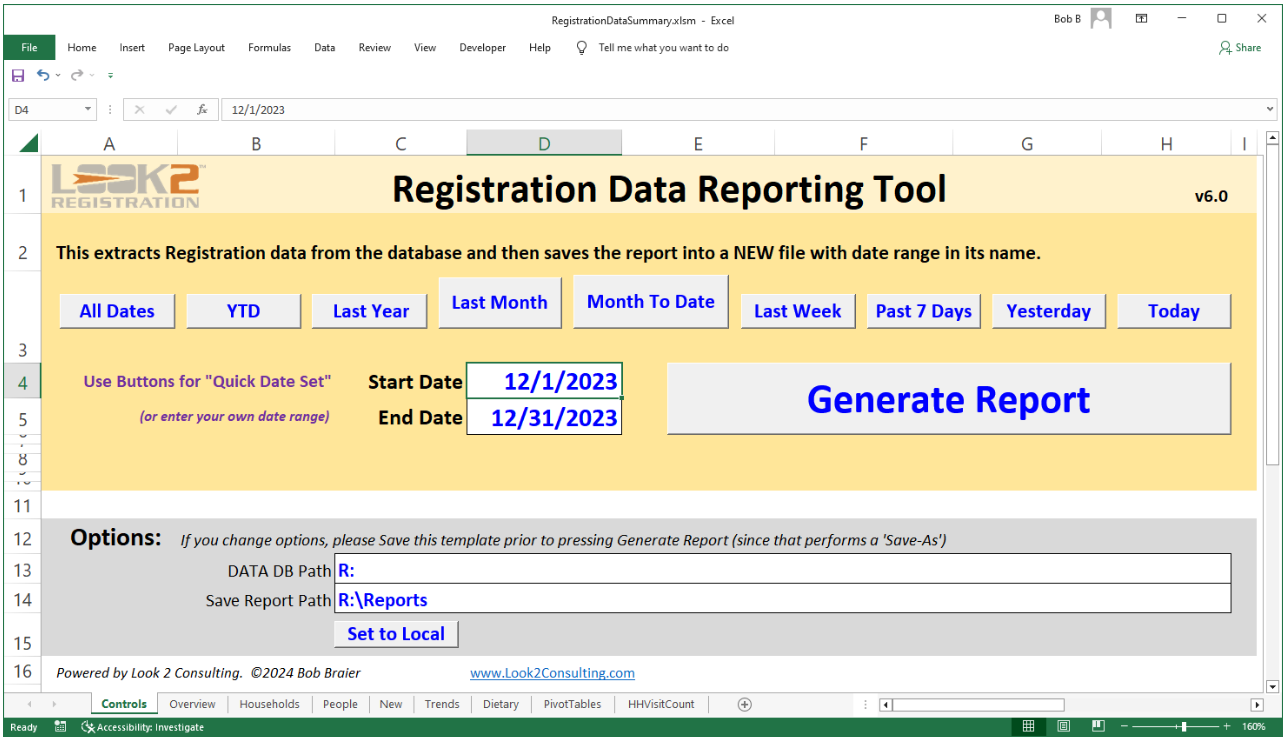
You can also press ALT-F4.

5.4. Excel Summary Report



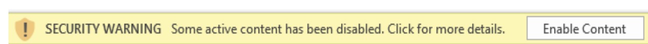
In addition to the reports built into the Registration System itself, an Excel file is supplied for extracting household and people data from the database: *RegistrationDataSummary.xlsm*

It gathers the data from over 40 of the built-in reports, dozens of other summarized data, as well as 12-month trends and a pivot-table report ... all with just one click! To access this report, either launch it from the desktop shortcut, or from the Excel Summary Report button in the Reports screen.

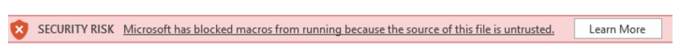


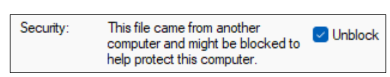
This Excel report file uses macros to extract the data from the Access database, saving the results in a separate report file with the date range in its name, stored in the \Reports subdirectory (this way the "master template" does not get overwritten).

NOTE - 1st Time Run: because there are macros, the first time you attempt to run this report you may get a Security Warning with a yellow background.
If so, press the Enable Content button.



For a Security Risk message with a red background, you must also check Unblock in the file's properties windows (see the Registration Quick Start Guide for additional details).

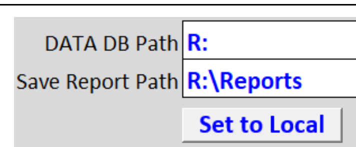




Also, if there are other issues with the Trust Center Settings or your copy of Office isn't properly licensed, macros may not run. If that is the case, you'll see a message below the options. Fix the issues to run reports.

Macros Not Run ... Check Trust Center Settings, Licensing, etc.

The paths used to get the data and then save the reports are options at the bottom of the main control page. By default it assumes the software is in the mapped R: drive. Use the Set to Local button, or simply edit the fields directly, if your installation is in another directory.



This report gathers registration data for the specified range defined in the Start and End Date entry fields. Either edit these date fields manually, or press one of the "Quick Date Set" buttons to have a macro quickly set these values.

Start Date	**11/1/2022**
End Date	**11/30/2022**

All Dates | **YTD** | **Last Year** | **Last Month** | **Month To Date** | **Last Week** | **Past 7 Days** | **Yesterday** | **Today**

If your site uses the tracking feature, you will also get options to use just one type (click the option desired).

Include All Visit Types | **Only Pantry > 0** | **Only Delivery > 0**

Once the dates are entered, press the Generate Report button to initiate the macro which extracts data from Access and puts it into the Excel report. The macro automatically closes the template and renames the new report file using the date range selected.

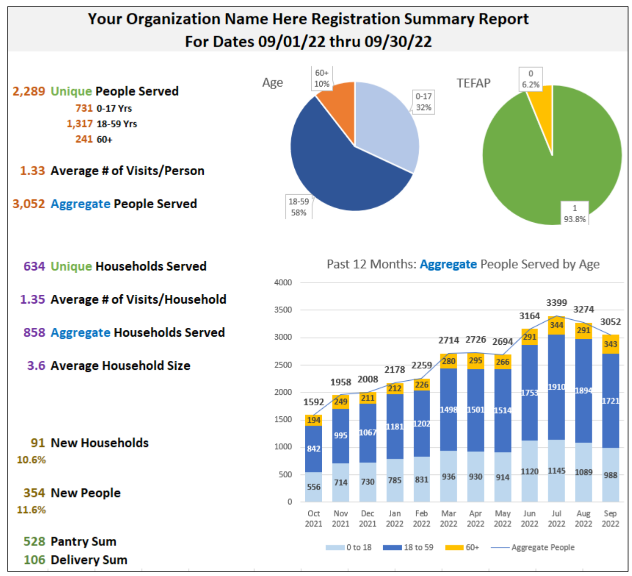
Generate Report

RegReport_01_01_21_thru_12_31_21.xlsx

There are multiple worksheets, accessible via the tabs at the bottom of the workbook.

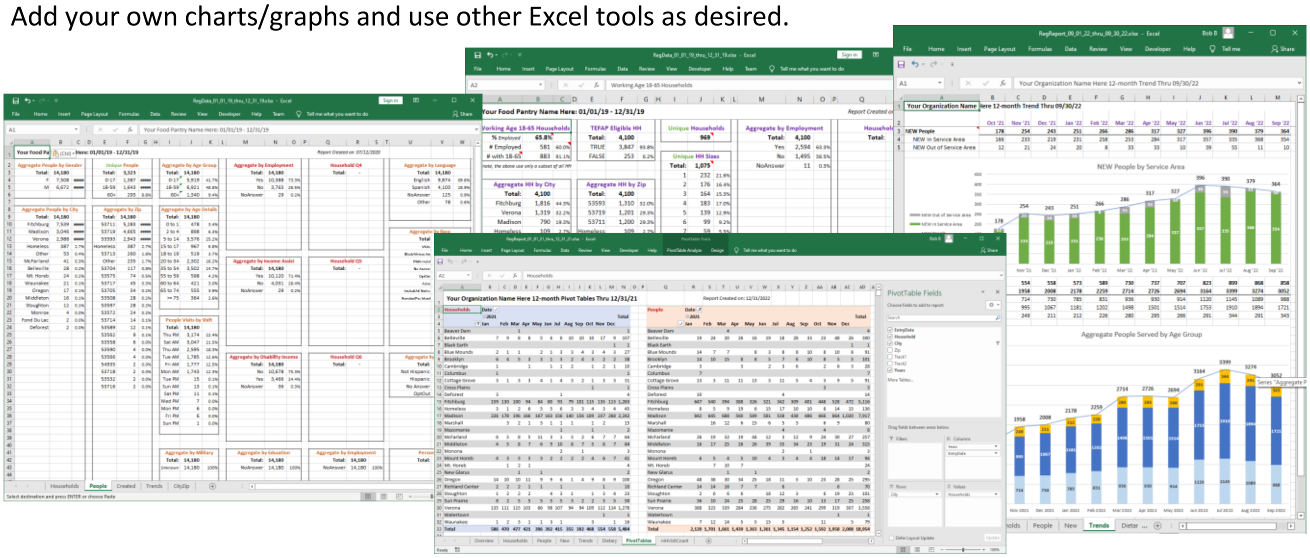
Overview | Households | People | New | **Trends** | Dietary | PivotTables | HHVisitCount

The first worksheet provides an Overview summary of the people and households served within the timeframe selected. (note: there's a separate document on the Look2 website describing how to submit these statistics to a food bank.)



Other tabs show Household data, People data, information on newly created households / people, a dietary tab, and a trend report showing data going back 12 months from the selected end date. The PivotTables tab shows cities by default (unless you use the Tracking feature), but you can modify/filter that table for zip codes, visit counts, optional visit-type tracking, and more. There's also a report # of households with Visit Counts.

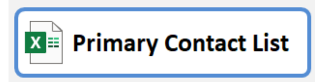
Add your own charts/graphs and use other Excel tools as desired.

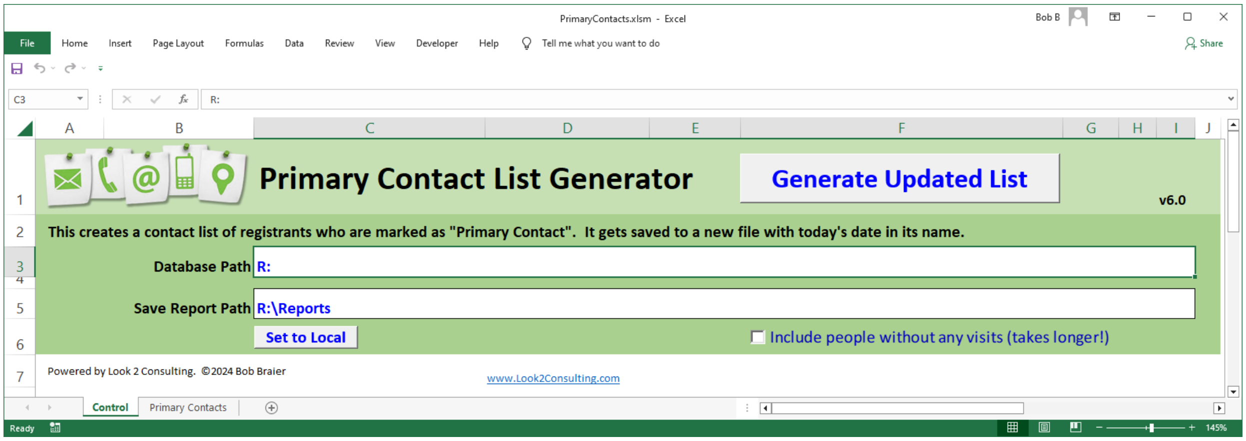


5.5. Excel Primary Contact List Report

An Excel file is supplied for creating a list of primary contacts: *PrimaryContacts.xlsm*

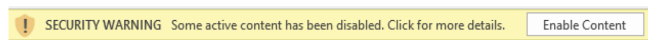
To access this report, either launch it from the desktop shortcut icon, or from the Excel Primary Contact List button provided in the Reports screen.



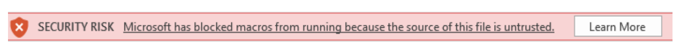


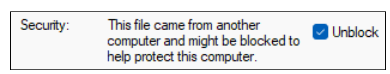
This Excel report file uses macros to extract the data from the Access database, saving the results in a separate report file with the date range in its name, stored in the \Reports subdirectory (this way the "master template" does not get overwritten).

NOTE - 1st Time Run: because there are macros, the first time you attempt to run this report you may get a Security Warning with a yellow background.
If so, press the Enable Content button.

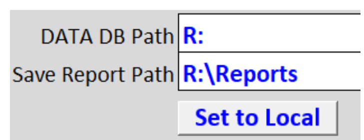


For a Security Risk message with a red background, you must also check Unblock in the file's properties windows (see the Registration Quick Start Guide for additional details).



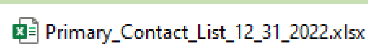


The paths used to get the data and then save the reports are options at the bottom of the main control page. By default it assumes the software is in the mapped R: drive. Use the Set to Local button, or simply edit the fields directly, if your installation is in another directory.

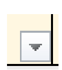


By default it shows only the primary contact for households with at least 1 visit recorded. To also show those with no visits, check the box provided. However, with this box checked, the report can take several minutes to generate instead of seconds ... so prepare to wait!

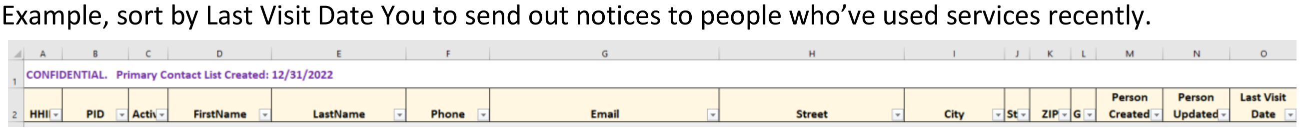
Press the Generate Updated List button to initiate the macro which in turn extracts the data from Access and puts it into the Excel report. The macro automatically closes the template and saves the new report.



In addition to the contact information, the person's gender is included (since some organizations desire statistics for grants based on gender of the primary person for the household).

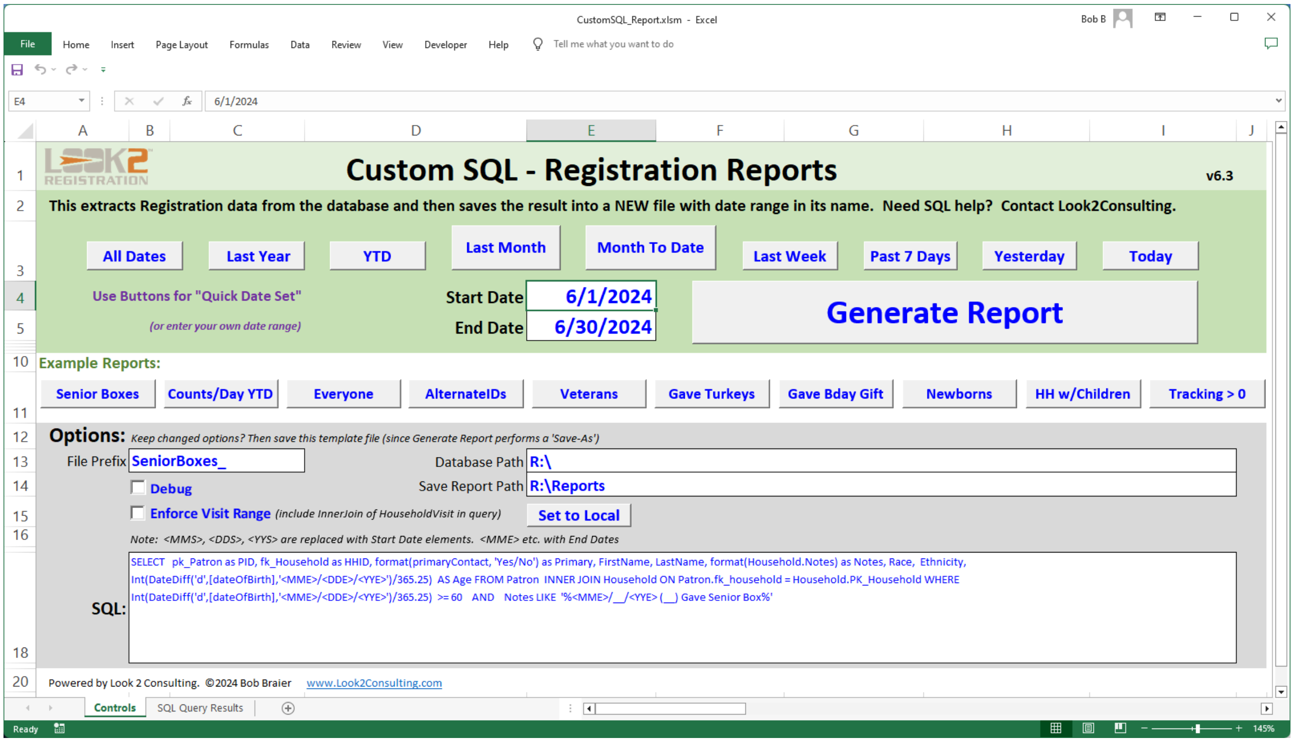
Sort/filter via the column arrows. 

Example, sort by Last Visit Date You to send out notices to people who've used services recently.



5.6. Excel Custom SQL Report

An Excel file is supplied to help run custom SQL commands: *CustomSQL_Report.xlsm*.
This is an **ADVANCED** tool, helpful if you understand SQL to get desired data. To access this report, either launch it from the windows file explorer or from the Excel Custom SQL Report button in the Reports screen.



This has similar controls to the main Report Tool for date range and paths (see previous sections).

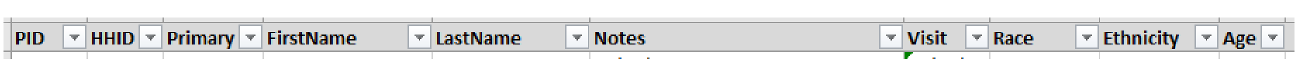
This report allows creation of custom SQL Queries with the data extracted into a new Excel worksheet.

NOTE: even though "?" is the wildcard character within the Registration software itself, when issuing custom SQL commands from Excel, the wildcard is instead an underscore character "_". White-space (new lines and spaces) are ignored within elements of the SQL string, and can be used to help readability.

There are also special wildcards to represent selected start/end timeframes. In the above screenshot "<MME>/__/<YYE> (__) Gave Senior Box" searches for such entries in the month of December 2023, with any registrar initials. The example's WHERE clause also limits results to people 60 and over as of Dec. 2023.

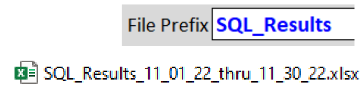
By having the "Enforce Visit Date Range" checked, it will only return results with people having HouseholdVisit table entries within the selected timeframe. However, your SQL query must also be compatible with this additional "WHERE AND" clause being tacked on. For example, this box should be unchecked if using the Counts per Day example.

The macro automatically gets the field names based on the Query results and populates the spreadsheet headers with those names, placing them in "filter" mode.



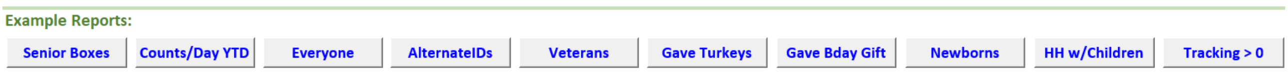
If Notes field is included, the macro only gets the first 255 characters of those notes, then removes some formatting commands embedded within the RichText format of the notes field.

Results are saved to a filename with the prefix supplied and date appended.



Normally the Debug box should be unchecked. However, if you're unsure if your SQL syntax will work, check this box so the macro does not perform a "Save-As", allowing easier query testing. A message box is also shown prior to getting the data, allowing you to copy/paste to review the resulting query.

Example reports with the SQL statements already created are supplied via the buttons provided.

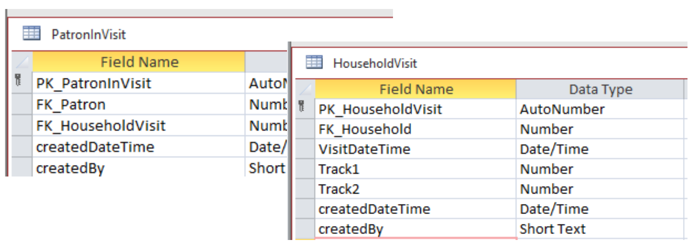


Clicking an example report button will:

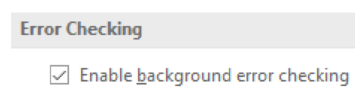
- Copy the corresponding statement to the SQL field
- Update the File Prefix
- Check/Uncheck the Enforce Visit Range box

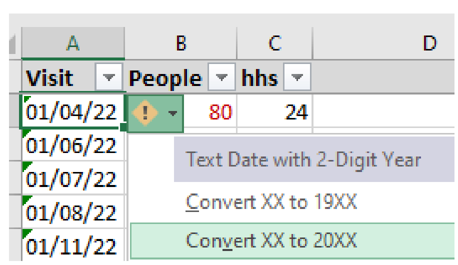
Some use a date selection, others do not. See the SQL statements being used to learn which is which. Use these examples as starting points for your own custom reporting.

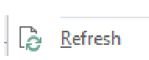
For a complete list of fields, see the table designs in the DATA and CONFIG database files.



TIP: By default, Excel treats the any date column results as plain text, making it challenging to consolidate/group in Pivot Tables. With "Enable background error checking" turned on (File-Options-Formulas), Excel will flag these fields with a small green triangle in the upper-right corner of the cell. Select the entire range of cells with these "text dates" and choose "Convert XX to 20XX" in the popup list (see example to the right). This will transform those values into dates, which Excel can then use for various graphs/tables/etc.







Remember to then REFRESH any pivot table, so its data cache can see that these are now dates instead of text.

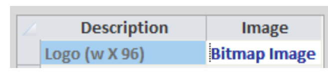
6. Customization, Configuration

This section is intended to be used by the System Administrator and assumes that person is someone familiar with Microsoft Access. The system allows the following customization:

6.1. LOGO

Your organization's logo will appear in the Visit Ticket, each of the built-in report headers, and the Shopping Slip. If your logo changes, edit it via the tblImages in the CONFIG database (accessible in the Configuration Settings Screen). The 1st entry in that table is "Logo (w x 96)"; it has a field called "Image". To have it display your logo, follow these steps:

1. Double-click on the image record *(where it says either "Bitmap Image" or "Paintbrush Pic")*
2. This opens up the default logo in Microsoft Paint
3. Copy and paste your own logo on top of this one to replace it
4. Close Microsoft Paint



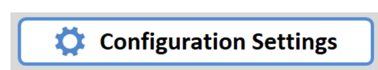
NOTE: don't copy/paste directly from Adobe Photoshop into Access, as that results in storing a more complex object; instead open it in Microsoft Paint

The software attempts to scale the image to fit the area allocated. To avoid pixilation, it is recommended that your logo is 96 pixels high. As for width, while many logos are roughly "square" (i.e., 96 x 96), some are more rectangular. As long as the image is 96 high, it can accommodate an image up to 168 wide (a 1"x1.75" ratio) without distortion; beyond that, it will scale the image and may thus appear off-center.

6.2. Sound for Save Visit

The software plays a short/simple confirmation sound whenever a Visit is recorded. The WAV file is located in the Resources subdirectory. You can also turn this feature off via a parameter described in section 6.3.

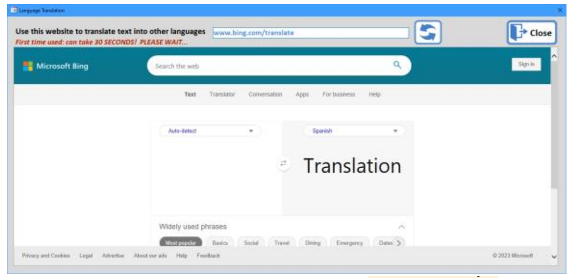
6.3. Parameters Table



The following items can be configured via the Admin Configuration Settings button, as described in Section 4.3.9 *(also accessible directly via the tblParameters table in the CONFIG database, but note: the numbers below refer to the SortOrder field, not the ID itself)*:

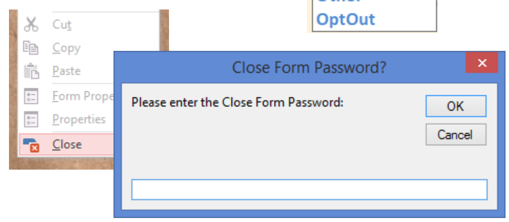
1. **Organization Name** – Type in the name you want to appear at the top of the Home screen
2. **Location (LocName, City, Zip)** – Not currently used by version 5.1. If desired, enter your organization name, city and zip, separated by commas.
   Example: *BPNN (1200 E. Verona Ave), Verona, 53593*
3. **Address Verification Website (hide if blank)** – This is the web site used for verifying a Patron's address is in your organization's service area. If blank, the "Check Address" button gets change to just read "Clean Address" and the verification pop-up window is no longer shown.
   

   IMPORTANT: please specify "https://" as the start of your website (i.e., don't just start with "www.")



4. **Translation Website (hide if blank)** – You can specify a website for translating between two languages (e.g., English to Spanish). Note: some do NOT work within an embedded web browser control. Test the site you enter before putting it into production! As of this writing, www.bing.com/translate worked.

5. **Additional Languages** – The language dropdown list shows at a minimum "English; Spanish; Other; OptOut". You may enter up to 7 additional languages, each seperated by a semicolon, within this field. By default, this is set to: "Hmong; Vietnamese".



6. **AP CF (Close Form Security)** – If a Registrar right-clicks the main form and chooses Close, the software asks for a password (thus making it more secure, restricting access to the tables via this method). The password used is in the **AP CF** setting. If left blank, it will not prompt for a password.

7. **Default 2-Letter State Abbr** – Enter in the 2-letter abbreviation of your organization's state (e.g., WI). When creating a new household, a blank form appears asking for, among other things, the address. To help with data entry, this 2-letter state abbreviation is pre-filled in.

8. **Person Term** – This is the term for the people using the services for your location. Examples include "Client", "Patron", "Guest". It assumes any plural will simply add an "s" to the end. So, with the parameter entered as "Client", the software will then change "Patrons" to "Clients".

9. **Play Sound (if no Visit Ticket - True or False)** – when a visit gets added to the database for a given household, and Visit Tickets are not being printed, a sound plays to provide feedback to the Registrar that it has been entered. Set it to False if you do not to hear the confirmation sound.

   Furthermore, the sound file itself can be modified for your site. Simply replace the *VisitAdded.wav* file in the Resources subdirectory with the WAV sound file desired *(rename your file to VisitAdded.wav).*

10. **Seconds before AddVisit message (0=hidden)** – Per section 2.4.18, you can specify the number of seconds used before the logic kicks in for showing the "you forgot to add today's visit" message.

11. **Autostart Barcode Search in Find (True or False)** – If set to True, the Ready to Scan a Barcode dialog automatically pops up whenever the Find button is pressed. If set to False, the dialog isn't automatically opened, but can still be accessed by pressing the Scan ID button. This is helpful if you use a scanner and the majority of people bring their IDs (thus eliminating an extra click for each Find).

12. **Allow Registrars to Override Visit Date (True or False)**– By default, only Admins can use the override visit date feature. Set this to True so everyone can use that feature.

13. **Show Dietary Restriction Options (True or False)** – This setting dictates whether the dietary section appears in the Household Form or not.

(note: multiple entries are labeled as 14 to group them together)

14. **People Placeholder Prompt (Yes, No, TEFAPOnly) –** If Yes, software prompts for adding people placeholders after saving a new household. If set to TEFAPOnly, it will prompt only if the TEFAP setting is set to “Only” in the household creation window.

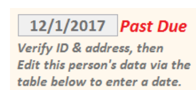
14. **Show TEFAP (True or False)** – This setting dictates whether the TEFAP question appears in the Household Form or not, as well as the TEFAP chart in the Excel Summary overview sheet.

14. **Require Race (True or False)** – If True, the Race field cannot be left blank when adding/editing a patron.

14. **Require Race (True or False)** – If True, the Race field cannot be left blank when adding/editing a patron.

15. **Visit Frequency #,interval (MWD, blank=unrestricted) –** As described in section 2.4.16, the software shows warnings if a household visits more frequently than policy allows. This parameter sets that warning policy as follows:
    - For unlimited visits (i.e., no warning), set this parameter to blank.
    - For X visits per calendar month, set this to “#,M” where # represents how many allowed. Examples: 2,M means 2 visits per calendar month; 1,M means 1 visit per calendar month.
    - For X visits per calendar week (starting on Sunday), set this to “#,W” where # represents how many allowed. Examples: 1,W means 1 visit per calendar week.
    - For 1 visit per so many days (not looking at the month itself, but rather relative days from today), set this parameter to #,D, where # represents the frequency. Examples: 2,D means once/2-days; 4,D means once/4-days.

    NOTE: this setting does not “prevent” further visits, but rather controls the showing of the warning messages so an informed decision can be made.



16. **Verification Reminder Days (0=hidden)** – Number of days after which the Past Due notice appears. Example, 365 to review ID’s every year. Enter 0 to hide this feature.

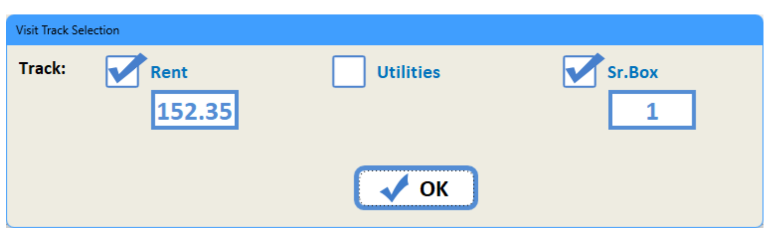
17. **Track Labels (1,2,3 ... hide if blank)** – If a label is entered (e.g., “Food”), a column is shown in the household history list where a number can be manually entered (e.g., lbs of food taken, or a 1 if true for a visit type). If a second label is also configured (seperated by a comma), a 2nd column is also shown. In example to the right, the setting would be “Food,Cloth”.

VisitHistory	Food	Cloth
08/16/20	135	2
07/12/20	109	5
05/19/20	146	8
05/09/19	123	12

    If you only want the 2nd column to appear start with a comma (i.e., leave the first label blank).
    Similarly, you can enter a 3rd label. The example to the right shows Sr.Box, Pickup, and Delivery tracking.

Visits	Sr.Box	Pickup	Delivery
04/07/24	2	1	
04/06/24	2		
04/05/24			
03/25/24			1

    If nothing is entered for this parameter, only the Visit History date is shown, and it also includes the timestamp (since there’s more width available).
    There’s a special case designed to help facilitate Senior Box for the CSFP program. If a tracking label is given the name “Senior” or “CSFP” or “Sr.Box”, then the software will automatically fill in the number of people 60 and older into the data entry field within the prompt dialog (once the box is checked).



18. **Prompt for Track (True or False)** – At least 1 track label (per above) must be defined for this to take effect. When the Registrar adds a visit, a dialog further prompts asking for tracking details.

19. **Diaper Age in Months (0=hidden)** – Specify the number of months for which the Diaper Icon will be shown if there is anyone in the household <= that many months old (default is 36). Enter a 0 to disable this feature.

20. **Birthday Icon Max Age (0 = hidden)** – Specify the maximum age, in years, for which the Birthday Icon button will appear (default = 18). Enter 0 to hide this feature.

21. **Birthday Window +/- Days (-1 = "in the month of")** – the Birthday Icon appears if a household member has a birthday within that # of days (either before or after today's date). Example: a value of 14 looks for birthdays from 2 weeks ago to 2 weeks in the future. If set to -1, the software looks anytime within the current month rather than using a +/- window.

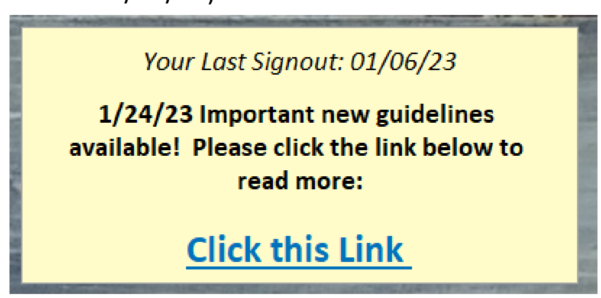
22. **Signin Notice (mm/dd/yy Message)** – If text is entered for this parameter, that text is show in on a note in the login window whenever a Registrar signs in. The note also shows the date that registrar last signed out.

    If the message text is preceded with a start date, then that message will only be shown on/after that date to people who have not yet logged into the system on/after that date. (They thus see the message only once).

    This is further tied in to the next Parameter to show an optional Hyper Link.

    Example: if the message is *"1/24/23 Important new guidelines available! Please click the link below to read more:"* and a link is specified in Parameter 26, then the following message will appear (as long as the person has not yet logged in on/after the specified date of 1/24/23):

    If this parameter is blank, no message is shown.



23. **Signin Notice Link (optional)** – If the previous parameter for Signin Notice has an entry for showing a message to Registrars upon sign-in, this parameter is used to optionally provide a link for further information. It can be either:
    - a local file. Example: C:\Announcements.pdf
    - a web link. Example: http://look2consulting.com/ ***(Note: web links must start with "http://")***

    The link itself will be used as the control tooltip.

    If blank, no link is shown for the Signin message and the note background is made shorter.

6.4. MyPC Table *(settings local to each PC)*

The following items can be configured via the Admin Configuration Settings button, as described in Section 4.3.9 (also accessible directly via tblMyPC table in the MyPC database):

1. **WorkstationID –** set this to a unique number for each PC running Registration

2. **ID Printer (hide if blank)** – there's an ID Card report designed to fit size CR80 (2.125" X 3.375"). Set this parameter to the name of the printer (case sensitive). It can be the same one used for the Visit Ticket. If blank, the Print ID Card button will be disabled in the Household Registration screen.
   For network printers, be sure to include the domain (e.g., "\\REGISTRATION01\Dymo 400"). See section 7.2.1 for details on configuring the printer.

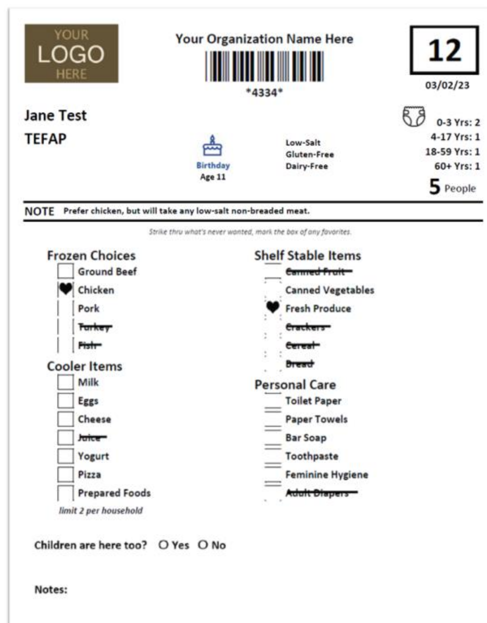
3. **Visit Ticket Printer (hide if blank)** – there's a report designed to print out a 2.25" x 4.8" Visit Ticket. Set this parameter to the name of the printer (case sensitive). If blank, a Visit Ticket is not printed.
   For network printers, be sure to include the domain (e. g., "\\REGISTRATION01\Dymo 450"). See section 7.2.1 for details on configuring the printer.

4. **Shopping Slip Printer (hide if blank)** – there's a report designed to print out an 8.5 x 11" Shopping Slip. Set this parameter to the name of the printer (case sensitive).
   For network printers, be sure to include the domain (e.g., "\\REGISTRATION01\LaserJet").

   If blank, the Print Shopping Slip button will not be shown in the Household Registration screen, so the various shopping preferences per Section 2.4.19 will not be accessible.

   TIP: If you want to make use of the preferences, but not print out the reports, you can always specify "Microsoft Print to PDF" as the printer name. This way the button and features will be enabled, yet no printouts get generated.

   NOTE: font *BarcodeFont_CCode39.ttf* must be installed for the barcode to print *(located in the Resources folder)*.



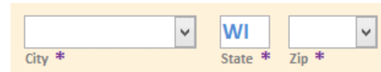
5. **Report Printer (default if blank)** – most reports within the software, including the sign-in screen's day report, are designed to print on 8.5x11 paper. Set this parameter to printer name (case sensitive) you wish to use for these reports. If blank, the default printer defined within windows itself will be used. For network printers, include the domain (e.g., "\\REGISTRATION01\ColorLaser").

6. **Show Minimize Button** – Set this to False if you want to hide the Minimize Button on the main screen.

7. **Allow PreRegistration Import** – Set this to False if you want to hide the PreReg Button on the main screen. (Note: it also gets hidden if the user's Role is "Express")

8. **Station Type (Express, Normal)** – Set this to Express to hide features on a express check-in station.

6.5. City Names, Zip Codes



When Registrars edit a Patron's profile, dropdown lists provide pre-defined city names and zip codes (users can type in their own, but these lists help ease the user-input process). You can edit what appears in these lists by changing the entries in the CONFIG tables: tblCityNames and tblZipCodes (editable via the Admin Configuration Settings screen).

6.6. Race

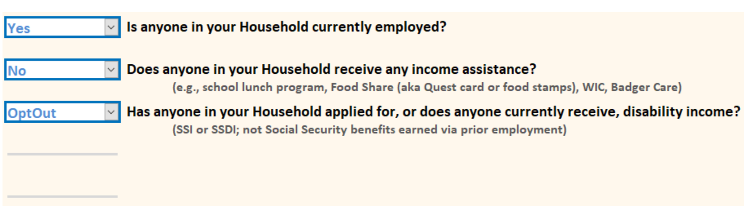
When registering a Patron, one optional entry field is their Race. You can edit what appears in the dropdown list choices by changing the entries in the table. By default, it comes with these predefined:

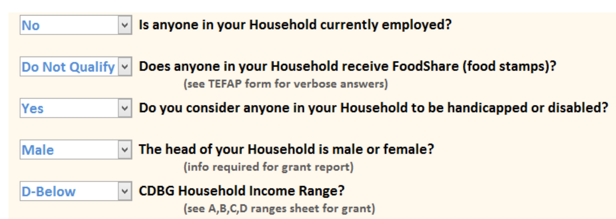
- White
- Hispanic/Latino
- Black/AfricanAm
- Asian
- Am Ind/AK Native
- MiddleEast/N.African
- Hawaiian/Pac Island
- Multi-racial
- OptOut

If you desire to also track combinations of races, simply create those as additional options within this table (e.g., "White and Asian")

6.7. Six (6) Household Questions

For each Household, there can be up to six (6) questions which can be configured with multiple-choice answers. Below are 2 examples: one showing 3 questions and the other showing 5.





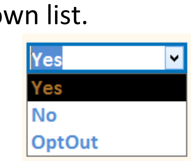
You can edit these in the table: tblHouseholdQuestions. You can also use the build-in form within the Configuration Settings screen as described in Section 4.3.12.

The fields are as follows:

- **AnswerChoices** – These are the multiple-choice answers which will appear in the dropdown list. Answers must be in quotes, separated by a semicolon. Example:

  "Yes";"No";"OptOut"

  Please keep the answers very short/abbreviated, as the answer list is narrow.



- **Question** – This is the on-screen question immediately to the right of the answer combo list. Example:

  Has anyone in your Household applied for, or does anyone currently receive, disability income?

  Please test it out to ensure it fits in the space provided.

- **ClarifyingText** – This is the smaller, gray text that appears just below the question to help clarify the question a little further. It's nice to surround it with parenthesis. Example:

(SSI or SSDI; not Social Security benefits earned via prior employment)
Please test it out to ensure it fits in the space provided.
NOTE: this can be left blank (to hide it).

- **ReportButton** – On the Report Screen, each Household question has a report associated with it. This is under the Legacy section, and not really used much anymore (keep for customers used to older-style reporting). You can refine what is shown for the report button's label by entering it in this field. Example:
  by Disability Income
  

  The software prepends "HH & People" in front of whatever you enter (see example to the right). Please test it out to ensure it fits in the space provided. (Questions without any definition are disabled.)

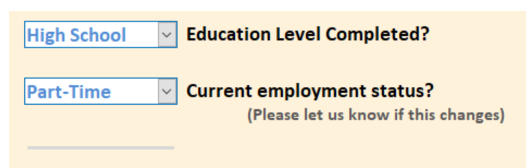
- **ReportTitle** – You can refine what is shown for in the Excel Summary Report section header, and also the legacy report title/header, for each of the Household Questions by entering it in this field. Example:
  By Income
  Please test it to ensure it fits in the space provided.
  

If a question is blank, the associated question/answer/report is hidden or disabled.

IMPORTANT: Once these questions are defined, BE VERY CAREFUL not to change the meaning of these one the software is in use, as the database records with any existing household answers would no longer match! If you must change one, you will have to archive the old answers and then clear them out of that field via the table **Household** (Q1, Q2, Q3, Q4, Q5, Q6), or use the feature offered in the editor for these questions, as described in Section 4.3.12**Error! Reference source not found.**. This is important so that the new question w ill start out "unanswered" for the households moving forward.

6.8. Three (3) Patron Questions

In addition to the questions for the Household, there are up to three (3) questions which can be tracked on a per-person basis, each of which can be configured with multiple-choice answers. The screen shot to the right shows an example when 2 of the 3 have been configured.

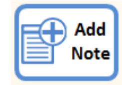


You can edit these in the table: tblPatronQuestions. You can also use the build-in form within the Configuration Settings screen as described in Section 4.3.12. The fields are the same as those described for the Household Questions in the previous Section.

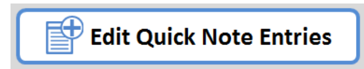
IMPORTANT: Once these questions are defined, BE VERY CAREFUL not to change the meaning of these one the software is in use, as the database records with any existing patron answers would no longer match! If you must change one, you will have to archive the old answers and then clear them out of that field via the table **Patron** (PQ1, PQ2, PQ3), so that the new question will start out "unanswered" for the patrons moving forward.

You can use the feature offered in the editor for these questions, as described in Section 4.3.12.

6.9. Quick Notes

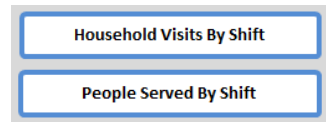


When editing a Household, you can enter free-form text in their Notes field, and also bring up a list of pre-configured messages to choose from. You can edit this list by changing the entries in the table: tblQuickNotes. The entries are shown in the order they are entered in the table.



You can easily change the order and edit the entries without having to go into the table itself by using the Admin function described in Section 4.3.1.

6.10. Time-Frame Shifts



The built-in reports and the Excel reporting tool which show visit counts by shift get the definitions for the start / end times, as well as the names given to these shifts, in the backend table FoodPantryShifts *(located in the DATA file)*. While the system comes with pre-defined shifts, know that you can change these (even adding more rows to define even tighter timeframes for multiple shifts within a given day).

FoodPantryShifts

SID	ShiftName	DayOfWeek	StartTime	EndTime
1	Sun AM	1	0	11
2	Sun PM	1	12	23
3	Mon AM	2	0	11
4	Mon PM	2	12	23
5	Tue AM	3	0	11
6	Tue PM	3	12	23
7	Wed AM	4	0	11
8	Wed PM	4	12	23
9	Thu AM	5	0	11
10	Thu PM	5	12	23
11	Fri AM	6	0	11
12	Fri PM	6	12	23
13	Sat AM	7	0	11
14	Sat PM	7	12	23

ShiftName: while you can change these names, it is recommended to keep them short *(so they fit the width provided in the Excel report tool)*

DayOfWeek: 1 = Sunday, 2 = Monday, etc.

StartTime: hour portion of a 24-hour timestamp (e.g., an entry of 14 starts at 2:00:00 PM)

EndTime: hour portion of a 24-hour timestamp (e.g., an entry of 11 goes to 11:59:59 AM)

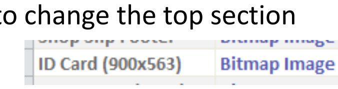
TIP: if you only have afternoon shifts, and you sometimes start early (e.g., 11:50am instead of at 12:00pm), you could change EndTime for AM shifts to 10, and StartTime for PM shifts to 11, so all entries are grouped.

6.11. ID Card

As mentioned in Section 6.4, you can configure a printer for an ID Card. The software prints the first and last names, along with their Household ID number as a scannable barcode.

The rest of the card layout is defined by a background image configurable via the Admin Configuration Settings screen. This image must remain 900 pixels wide by 563 pixels tall (which is 3” x 1.87” at 300 dpi) so it fits in the preconfigured ID Card report layout.

Double-click on the Bitmap Image in the Images list to bring up the Paint editor to change the top section (~220 pixels) to meet your needs, including adding your logo, changing the overall layout, and replacing the QRCode.

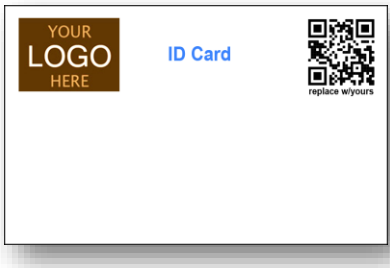


To create your own QRCode, it’s suggested to have it point to your website’s homepage (since sub-pages tend to change with website design over time). There are websites that generate these for free.

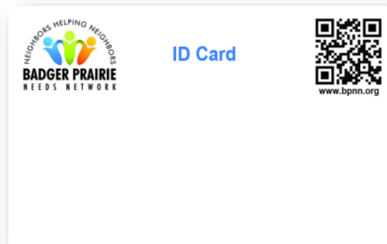
If using a Dymo thermal printer and a border is desired to aid in trimming it for lamination, keep the border within this image.

HOWEVER, if using a dye-sublimation printer that uses plastic ID cards, remove the outside border!

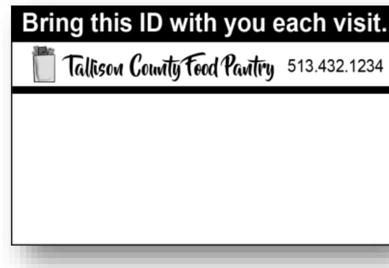
Here are some examples:



Supplied IDCardBackground.jpg



Modified for Plastic ID Color Printer

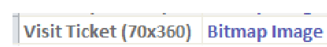


Bordered layout for B&W Label Printer

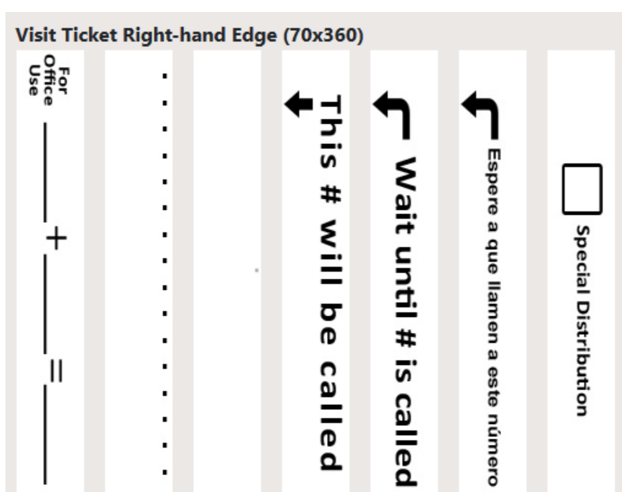
6.12. Visit Ticket Right-hand Edge

As mentioned in Section 6.4, you can configure a printer for Visit Ticket. The right-hand edge of that ticket is defined by an image configurable via the Admin Configuration Settings screen. This image must remain 70 pixels wide by 360 pixels tall so it fits in the preconfigured layout.

Double-click on the Bitmap Image in the Images list to bring up the Paint editor to change it to meet your needs.



Click on the link above that table to take you to the Look2 Online Image Library, where there are some examples to choose from (or, build your own).



6.13. Shopping Slip

As mentioned in Section 6.3, you can configure a printer for a Shopping Slip.

Section 2.4.19 describes what the software includes in the top portion of that form.

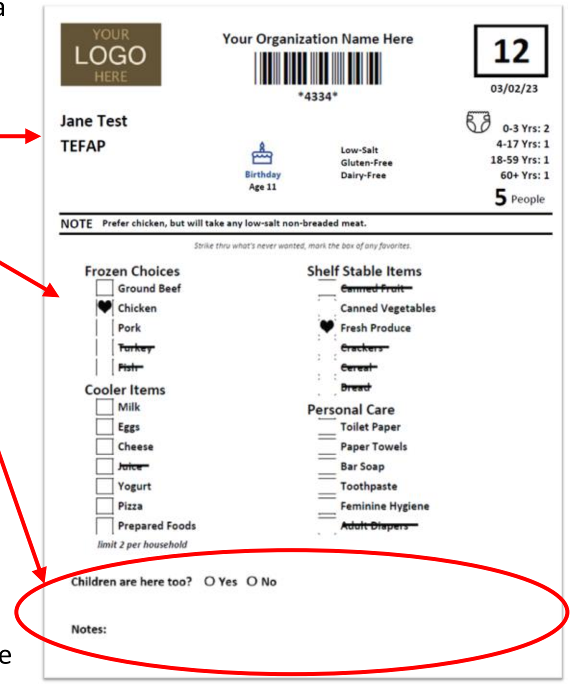
The choices within the form are configurable, as described in Section 4.3.13.

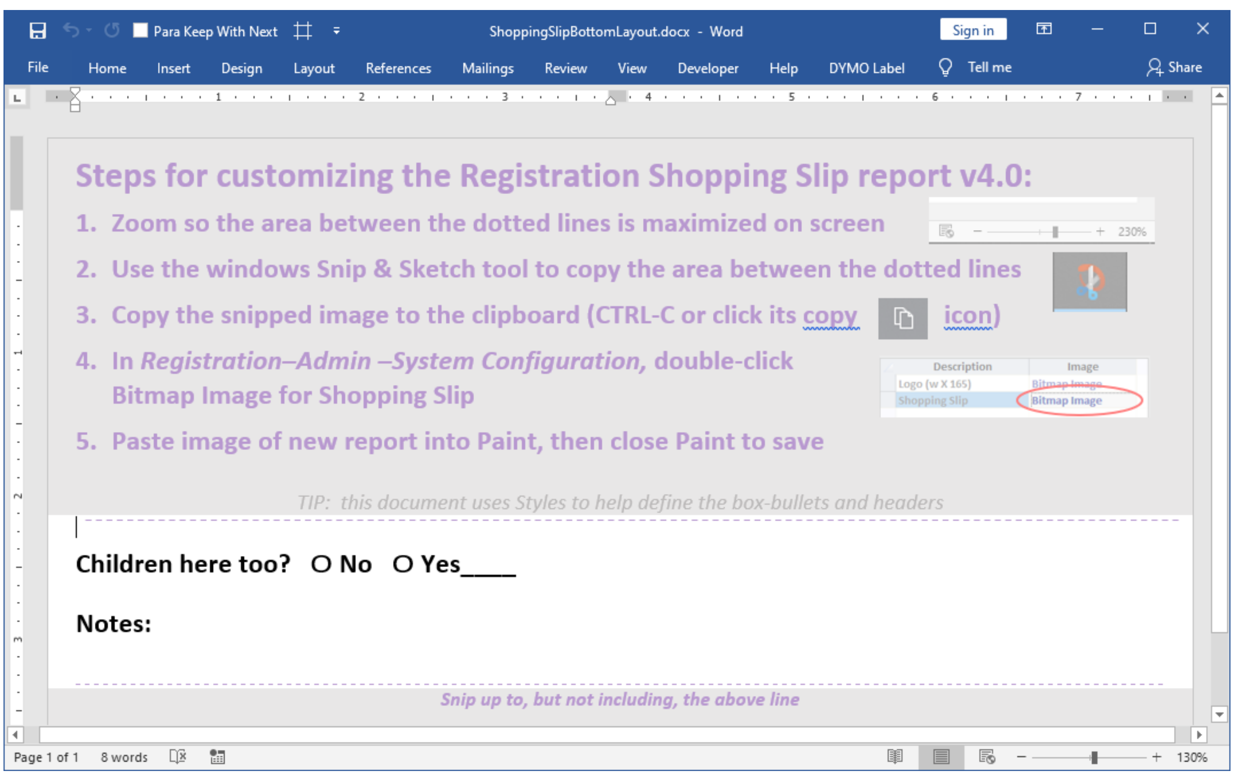
You can also define what appears at the very bottom of the form by modifying the image stored in tblImages, which is also accessible to an Admin via the Configuration Settings screen (see Section 4.3.13).

The software scales the image to fit the space provided. It is suggested that you use the image size originally provided, and simply edit its contents to fit your needs.

There is a Word document in the Resources subdirectory offering an example layout and instructions on how to update the report:

ShoppingSlipBottomLayout.docx





7. IT Topics

This section covers some miscellaneous topics of interest to IT staff.

7.1. PC Requirements

The system has been designed to work as a local application (i.e., not web-based) on a PC having:

- **OS:** Windows 10 or 11.
- **Display Resolution:** 1920x1080 or 1920x1200 *(at 100% scaling)*
- **Touch Screen:** not required. Because this is really a keyboard-intense set of operations, a regular non-touch screen will suffice. Using a 21” or larger monitor is preferred.
- **RAM:** the software needs enough RAM to run the OS, Microsoft Access and Excel. The combinations of various versions can be complex, but it has been successfully tested with system memory of 6GB.
- **Speed:** the CPU Benchmark Rating of the computer’s processor should be > 3200. However, if it is getting its data from a Local Solid-State Disk (not over networking, etc.), then the rating can go even lower (e.g., @ 2500). Slower ratings “may” work, but not recommended due to other load factors.
- **Hard Drive**: the software does not take up much disc space (< 1 Gig), and so any modern computer should have adequate disc storage space for the software and its reports. An SSD will improve performance.
- **Networking**: if the software is connected to its back-end databases locally, network speed/reliability should not be an issue. If the linked database files reside on another PC and/or Server, it is strongly recommended that a wired connection with 1G speed be used.
- **Microsoft Access/Excel:** the software has been tested with Office 365, Office 2019, and Office 2016. Both Access and Excel are required for the main program. Non-profits can get a discounted copy via Tech Soup: www.techsoup.org. You can also run the GUI with the FREE runtime version of Microsoft Access (though you won’t be able to make back-end edits at the PC, nor get rid of the launch warning).

  The PC that runs just the PreRegistration software doesn’t require Excel. The free Access Runtime version is most likely sufficient for these deployments.

NOTE: the software has also been designed so the DATA and CONFIG back-end databases can run in SQL Express (SQL Server). Please contact Look2Consulting if this is desired for your organization.

7.2. Optional Hardware

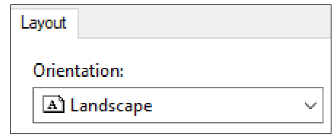
The following additional pieces of hardware may optionally be used with the system.

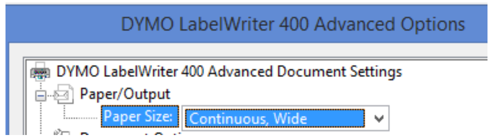
7.2.1. Printer for Barcode ID and/or Visit Ticket

The Visit Ticket and the Household ID Card have been designed such that they can use a small printer.

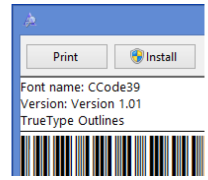
Both have been tested with the Dymo 400 and 450 Thermal Printer using paper type 30270 (continuous receipt paper). NOTE: the new Dymo 550 requires use of their special paper; generic rolls cannot be used.
The ID Card has also been tested with a MagiCard 300 (dye-sublimation printer for plastic cards).

IMPORTANT: If using a Dymo printer, you must go into the PC's Printing Preferences and set that printer's default to be Landscape, with "Continuous, Wide" paper.





Also, font *BarcodeFont_CCode39.ttf* must be installed for the barcode to print properly *(located in the Resources folder)*.



7.2.2. Barcode Scanner for Household Lookup

If you want to scan the barcode that's printed on the bottom of either the Household ID Card or the Visit Ticket, you'll need a Barcode Scanner that connects via USB having Windows drivers. These can be obtained for anywhere from $20 to $90, with the more expensive ones offering wireless connectivity and continuous scanning options that work even outside in direct sunlight. Look for one which can read CODE39 barcodes (most do) and can read thru reflective surfaces (in case you laminate ID Cards).

7.2.3. Laminator and Pouches for ID Cards

You can optionally laminate the printed Household ID Cards using small ID Badge lamination pouches.

If you use a thermal printer to create the ID cards, make sure your laminator is on its coolest setting, and you may have to place the pouch inside a protective folded piece of paper to further lessen the effect of the heat (otherwise it may darken the thermal paper).

There's also a template, located in the Resources directory, for including a backside message.

7.3. Files, Archive, Backup

This section covers the main files which comprise the Look2 Registration system, and thoughts on making backup copies of not only the system, but daily (or even hourly) backup of the data generated.

7.3.1. Registration Files

The main portion of the software has been designed to use these Microsoft Access files:

- **Look2_Registration_GUI.accde** *(Look2_Registration_GUIx32.accde for 32-bit Office installations)* – contains the forms and programming modules which define the software interface. It has links to the tables in the CONFIG, DATA, and MyPC tables, per below. To more easily deploy the software to multiple sites without having to re-link the files, the software directory gets mapped as a "R:" drive.

- **Look2_Registration_CONFIG.accdb** – config file with tables: tblCityNames, tblHouseholdQuestions, tblPatronQuestions, tblImages, tblParameters, tblRace, tblZipCodes, tblShoppingSlipDef, tblDietaryDef
- **Look2_Registration_DATA.accdb** – main DATA file which contains the rest of the data tables
- **Look2_Registration_MyPC.accdb** – config file with definitions for the printer names, meant to be stored locally in the same directory as the GUI, and can be configured for each PC in the system
- **Look2_PreReg.accde** *(Look2_PreRegx32.accde for 32-bit Office installations)* contains the forms and programming modules for the Pre-Registration software interface. It has links to the PreReg_DB file, per below. To more easily deploy the software to multiple sites without having to re-link the files, the software directory gets mapped as a “R:” drive
- **Look2_PreReg_DB.accdb** – data file for the Pre-Registration system

Additionally, there are Excel files templates which extract data from the above database to produce reports: ***PrimaryContacts.xlsm, RegistrationDataSummary.xlsm, CustomSQL_Report.xlsm***

There are also subdirectories:

- **Resources** – contains files used by the software (sound wav file, fonts, ID Card templates, EULA)
- **Reports** – contains the output files generated by the Excel report templates

Because this system works in conjunction with Microsoft Access, there are no other “installed” files; it is all self-contained within the main Registration folder (and any shared DATA folder for multi-station installations, per below in Section 7.4).

7.3.2. Dropbox/GoogleDrive/Microsoft OneDrive Considerations

While this software has been used with both Dropbox and Microsoft’s OneDrive (cloud storage solutions offering automatic backup and remote access), it is NOT recommended to run the main DATA/CONFIG databases from such drives.

Rather, it’s better to make daily backup copies of your database files to such locations (using the built-in Windows Backup and/or Task Scheduler tools, per section 7.3.3).

The main reason is this: you cannot open the Access databases on more than one client at the same time with these “cloud drives”. Doing so will cause a “share conflict” and result in the creation of multiple copies/instances of the database file(s). Should this happen, you will see more than one copy of the DATA.accdb file, but with slightly different names (the cloud-programs add the user’s names in parenthesis, with Dropbox also adding the words “conflicted copy” and the date). The data then diverges into 2 (or more) databases, effectively BREAKING the system! The resulting mess forces you to then try to merge the records from the multiple files back together (not an easy task!).

So, to prevent the database files from opening up more than one copy at one time and hurting your system, only create backup copies to such cloud-based storage directories.

7.3.3. Backup

➲ **IMPORTANT: Creating backups of the system and data is left to your organization's IT staff.**

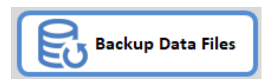
While the task of creating both an initial copy of the Registration system as well as frequent backups of the data generated by the system is the responsibility of each organization and varies depending upon the computer systems in place, this section gives an overview to assist in those efforts.

An initial backup snapshot of the system is important to capture the configuration files necessary for the system to run with the settings for a given site.
➲ **Simply make a copy of the entire Look2 Registration Software directory and its subdirectories.**

As for regular data backups, the primary file that changes on a day-to-day basis is the DATA file. So, unless there are changes to the configuration (CONFIG file), there is really only one file needing regular incremental backup. The file size is very small (example: 13,500 Patrons in 3,700 Households with 111,000 records in the visit history over a 5-year span has a DB file size < 16MB).

There are many solutions to backing up data. Here are some thoughts to help with this endeavor.

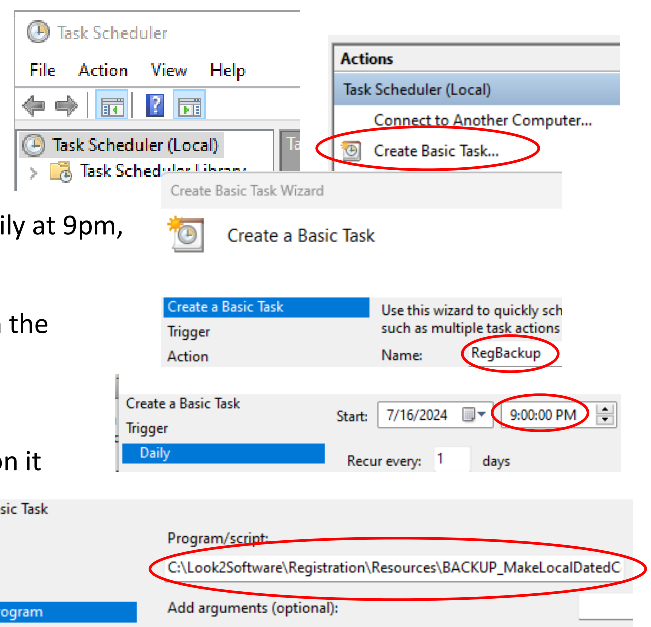
Option 1: Manual Backup



It's easy to make a quick manual backup of the CONFIG/DATA/MyPC/PreReg_DB database files using the Backup button in the Settings screen (see Section 4.3.10). Select any destination, including a USB stick, a NAS server, another PC, an external drive, OneDrive or a Google drive (or other cloud storage), etc.

Option 2: Scheduled (e.g., Daily) Task

Launch the Windows Task Schedular and use the Create Basic Task Wizard to run a nightly batch file to make copies of just the desired files.



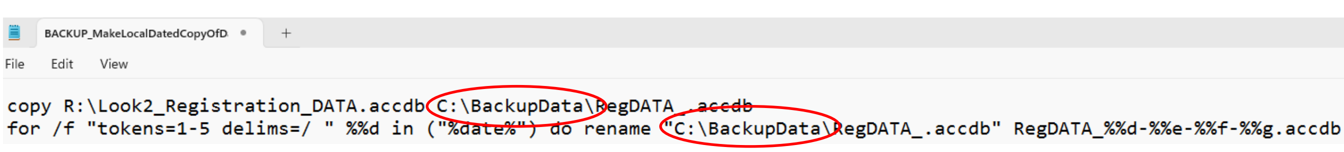
Example: name it "RegBackup", set the Trigger to Daily at 9pm, and the action should be "Start a program".

You can Browse to the example batch file supplied in the Registration Resources subdirectory:

BACKUP_MakeLocalDatedCopyOfData.bat

HOWEVER, **you must edit this** batch file (right-click on it and edit via Notepad) to match where you want the data file to be copied!

In the example below, change "C:\BackupData\" in 2 places to match the directory where you want the data to be backed up. Also note it assumes DATA is in R: drive.



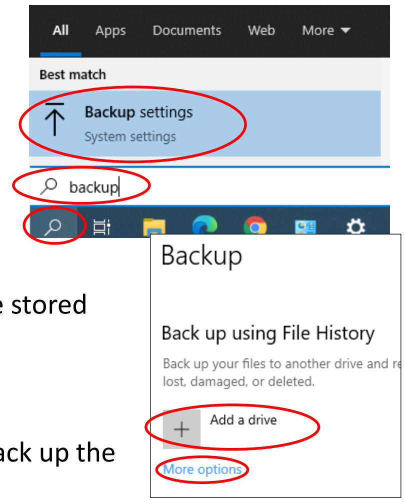

```
copy R:\Look2_Registration_DATA.accdb C:\BackupData\RegDATA_.accdb
for /f "tokens=1-5 delims=/ " %%d in ("%date%") do rename "C:\BackupData\RegDATA_.accdb" RegDATA_%%d-%%e-%%f-%%g.accdb
```

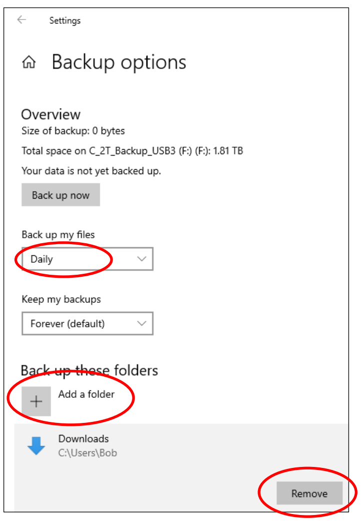
Option 3: Built-in Windows Backup

In Windows 10, you can use Windows Backup to back up the entire Registration system (~ 40-50Meg).

Here is a quick summary of how to use this method to schedule a backup in Windows 10.

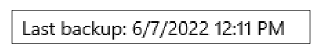
1. Click the Search Icon in the Windows taskbar and start to type "Backup". As you type, you should see "Backup settings" appear in the list.
2. Click on *Backup settings* to launch it
3. Click *Add a drive*, and select where you want your backups to be stored
4. Click on *More options*



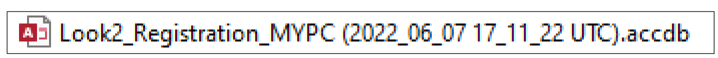


5. Select the frequency you want to back up the data (e.g., Daily)
6. Click on *Add a folder,* select where the Registration software is installed
7. Remove all folders you do NOT want included in your backup
8. Click the *Back up now* button to initiate the first backup

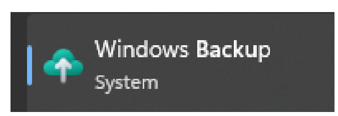
You can verify backup is working via the Backup options screen, which shows the date/time of the last one:



Windows Backup creates a folder named "FileHistory" in which the files are stored. The date/time of the backup is appended to each name.



In Windows 11, this backup system has changed. It assumes you are backing up to the built-in Microsoft OneDrive, but there are advanced options to configure other folders and other storage locations. You can find them in *Settings – System – Storage – Advanced storage settings.*



Please search the Microsoft documentation on the steps to use for this type of backup (too complex and detailed to attempt to summarize here).

7.4. Multi-station Setup

It is possible to have 2 or more Registration data entry PC's, all pointing to one common backend DATA DB. The known caveats are:

- you cannot edit the same household at more than 1 PC at the exact same time *(a scenario that should never happen anyway!)*; only 1 station can be editing data for any given household at that moment *(since simultaneous changes of one household/person would result in "last write wins" scenarios)*.
- the statistics on the home page only refresh when that workstation has entered a visit. So, a refresh button is provided next to the chalkboard to update the numbers from other workstations.

Typically, the system gets set up such that:

- each PC has its own GUI and other supporting files
- each PC creates a mapped (R:) drive to point to the common shared folder to access the backend database files (DATA, CONFIG and PreReg)
  (if, on rare occasion, you cannot create a mapped R drive, then re-link the GUI database to point to some other shared drive having these files via the Linked Table Manager in Access)

The common "backend" database files can be located as desired for your organization, including either:

a) A shared directory on a corporate server (this is preferred, since those are typically backed up automatically, and provides easy access to all workstations)

b) A local PC with a shared folder. This is useful if your organization doesn't have a corporate server (other PC's thus simply point back to that first PC's shared folder)

c) A Network Attached Storage (NAS) Device

CAUTION: use of certain NAS devices with certain settings has caused Access sharing conflicts which result it lost data without warnings! Details on such settings are unknown (symptoms have simply been observed). Thus, NAS is NOT recommended for multi-user scenarios unless you are familiar specifically with NAS for Access database sharing.

As noted earlier in this chapter (section 7.3.2), you cannot have the backend database files on the typical cloud-sharing services (e.g., GoogleDrive, Dropbox, or OneDrive) for multi-user sharing.

Test the multi-user setup at your specific location prior to use. The software is provided as-is and must be tested by you in your own setup/site to determine if it will work for your situation (networking/connection issues, permissions, etc.).

If possible, it's strongly recommended that a multi-PC environment have all PC's use a 1G Hard-Wired network connection (since wireless connections can be intermittent, slower, and subject to slowdowns).

If using Wi-Fi, consider a mesh network to help ensure a strong signal throughout your building. Put a mesh device next to a window to extend the signal to a drive-thru!

Please refer to the *Registration Quick Setup Guide* PDF on the www.look2consulting.com website Support Documents page for more details.

7.5. Migrating to a New PC

Migrating an existing system to a new PC is relatively straight forward. Simply follow these steps:

1. Install Excel & Access on the new PC, ensure display resolution is 1920x1080 *(or 1920x1200)* @100%
2. Copy the Look2Software folder from the C: drive of old PC to C: drive of new PC
3. Install the 2 fonts on the new PC *(detailed in Step 2 of the Registration Quick Setup Guide)*
4. Set Trust Center settings in Access & Excel on new PC *(detailed in Step 3 of the Registration Quick Setup Guide)*
5. Map the R: Drive on the new PC to point to the backend data files *(detailed in Step 5.2 of the Registration Quick Setup Guide)*. Depending upon how your system is configured, you will either:
   a. If the data is on another PC/server, simply map the R: Drive to point to that location
   b. If the data was on the OLD PC, then it was copied per step 2 above onto the new PC. So simply share the registration folder on the new PC and map that as the R drive (and re-map any other PC's to point to the new share on the new PC)
6. Perform any of the miscellaneous steps detailed in Step 8 of the *Registration Quick Setup Guide*

If your organization has another more complicated setup, please contact Look 2 Consulting for assistance.

7.6. Importing Data from 3rd Party Software

When switching from another system to the Look2Registration software, some organizations want to know if their existing data can be imported directly into the software. This requires a rather complex discussion, since there are so many different systems out there and thus various answers to this question. Rather than going into detail within this User Manual, please request a copy of the "Importing Data" document from Look2 Consulting if this is a topic of interest.