

Portable Scanning Device User Guide

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1. Connecting an VolunteerMatters Attendance scanner to the Internet

The scanner itself must be connected to the Internet to successfully synch attendance data from the scanner to our servers. This is often done by connecting the device to an internal network that has a shared Internet connection (like in the organization's office). You may connect either wirelessly (if your unit supports this) or by directly connecting to a network hub or Internet router with an Ethernet cable. Whatever network you have, it must be configured to support adding new devices. Some networks are easier than others to connect devices. In the vast majority of cases you can simply either plug the RJ45 patch cable (looks like a fat telephone cord) from the scanner's cradle to a network jack/hub/router or "find" and connect to a WLAN and the network will automatically "discover" the device, assign it a unique ID on the network, and allow it to have access to the Internet. While we go to great lengths to provide assistance with connecting devices to your network, ultimately we do not have an intimate understanding of the configuration and settings your network may have. Additionally, the customer contact may not have sufficient technical abilities to properly interpret our instructions. For example, many of our customer contacts wouldn't know what it meant to "Make sure a DHCP server is configured and operational on the network to which the Ethernet cradle is connected." If the following terms are not familiar to you, more than likely you will require the help of a network administrator: Ethernet, RJ45, Router, DHCP, IP Address, LAN, WLAN, Hub.

For Scanners with an Ethernet Cradle:

1. Make certain a DHCP server is configured and operational on your network
2. Make sure the IP addresses being distributed by the DHCP service will allow access to the Internet via a shared high-speed Internet connection to which the Ethernet cradle is connected
3. Make sure that your cradle is plugged into an electrical outlet and has power.
4. Make sure the scanner is properly seated in the cradle.
5. Plug one end of an RJ45 patch cable into the cradle and the other end into a jack/hub/or router (not into your computer). The network will automatically "discover" the device, assign it a unique ID on the network, and allow it to have access to the Internet.
6. Upon completing the above steps, check the light in front of the cradle:
 1. The amber LED remains dark when the Ethernet cradle is plugged in.
 1. Make sure the power supply is securely connected and receiving power.
 2. The amber LED blinks continuously.
 1. This means that the device is not able to obtain an IP address from your DHCP server. Make sure a DHCP server is configured and operational on the network to which the Ethernet cradle is connected.
 3. The amber LED is fully lit, but no synchronization with Closersware took place, and the green LED did not blink
 1. Remove terminal from the Ethernet cradle and reinsert it, making sure it is gently but firmly seated in the Ethernet cradle. Rerun the Closersware synchronization.
 4. The green LED remains dark
 1. Make sure the jack, hub or router you have plugged into is a) connected to the network, has power, and is functioning properly.
 2. Replace the Ethernet Cable (RJ45 patch cable) as it may be bad. Confirm that the Ethernet cable is a straight-through (or feed-through) cable and not a cross-over cable.
7. Start the Closersware application by double-tapping the desktop icon or by choosing Start --> Programs --> Attendance Scanner.
8. Tap the "Attendance Scanner" in the title bar to get to the menu options. Choose Tools --> Network Test" to test for basic network connectivity. If this test fails, this means that the

device must not have been properly "connected" to a network which provides access to the Internet. This is essential to synching the scanner with your membership database. If you would like more evidence that the device is not properly connected to the Internet via your network, you may exit out of the Closerware application by tapping in the word "Attendance Scanner" in the blue bar at the top of the screen. Next, you can use the Pocket Internet Explorer found in Start --> Programs --> Internet Explorer. If you cannot access the Internet via Internet Explorer, this is further confirmation that the problem resides with the connecting a hardware device to your network. Please consult a professional for further assistance.

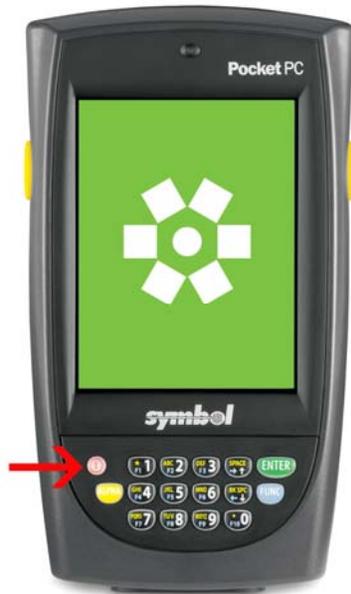
For Wireless Scanners:

1. Make certain a DHCP server is configured and operational on your network
2. Make sure the IP addresses being distributed by the DHCP service will allow access to the Internet via a shared high-speed Internet connection to which the Ethernet cradle is connected
3. On the scanner, exit out of the Closerware application by tapping in the word "Attendance Scanner" in the blue bar at the top of the screen.
4. In the Windows menu bar to the bottom-right of the screen there is an icon for WLAN (Wireless LAN).
5. Click "Find WLANs" and try to "connect" to your organization's wireless network. Depending on the security settings for your wireless network you may have to update the authentication or encryption tabs. In most cases, it is a matter of updating the encryption settings with a key that has been set by your network administrator.
 1. If you did connect successfully but receive a DHCP error, I would click the WLAN icon again and choose "Status", then choose "IP Status", then click the "renew" button for DHCP.
 2. If you did connect successfully but still receive a DHCP error, I would make sure a DHCP server is configured and operational on the network to which the wireless device is connected.
 3. If you did not connect successfully I would reset your router and try again.
6. Start the Closerware application by double-tapping the desktop icon or by choosing Start --> Programs --> Attendance Scanner.
7. Tap the "Attendance Scanner" in the title bar to get to the menu options. Choose Tools --> Network Test" to test for basic network connectivity. If this test fails, this means that the device must not have been properly "connected" to a network which provides access to the Internet. This is essential to synching the scanner with your membership database. If you would like more evidence that the device is not properly connected to the Internet via your network, you may exit out of the Closerware application by tapping in the word "Attendance Scanner" in the blue bar at the top of the screen. Next, you can use the Pocket Internet Explorer found in Start --> Programs --> Internet Explorer. If you cannot access the Internet via Internet Explorer, this is further confirmation that the problem resides with the connecting a hardware device to your network. Please consult a professional for further assistance.

Once your scanner is connected properly to the Internet you should be all set to start synching scan data to your membership database. After the above tests have been run with successful results the only other possible hurdle to synching would be if the password to the unit does not match the one we have on record for you in our servers. If you are able to synch without error, then these passwords match properly. If you attempt to synch and receive an error message "error.invalid.login[]", this message indicates that the scanner is communicating with the Closerware server, but the Synchronization password is incorrect. Please contact support@closerware.com and we can work with you to reset your password, which must be set on the scanner itself as well as our servers for security purposes.

2. Power On and Open Application

Power on your unit by pressing the power button. If the display is not back lit you may then hold down the power button to enable to backlighting.



If the application has not been started already you may select the “Attendance Scanner” icon from the desktop or go to Start > Programs > Attendance Scanner. Once the application has started you will see a main menu similar to the following:



2. Start a Scanning Session

Typically you create a scanning session for any period of time you will be scanning attendance to an event, program or initiative. Sessions are opened and closed. Each session is identified by a session name. A single event may have any number of scanning sessions associated with it.

Click on “Start Scanning Session”



The system will prompt for the Session Name and Scanner Name. The session name should provide descriptive information about what this scan session data will contain. This will be useful information once you upload this scan data to your database. For example session name may be “January General Membership Meeting”.

The Scanner name should provide distinctive information about which scanner was used to capture the information. For example, you may want to name the scanner after the individual performing scans or after the entrance that the scanner was being used (i.e., “West Entrance”).

You may use the “auto” button to insert the current date and time as the session name. You may also use the “last” button to insert the last session name used on the device.

Click “OK”

The screen will state “Scanner ready”

3. Start Scanning Barcodes

You may scan each individual's member ID card or sign-in sheet by pressing either on of the yellow buttons on the sides of the device and pointing it at the corresponding barcode. You may also press both yellow buttons simultaneously.



Hold the unit 2 to 4 inches from the barcode when scanning. Holding the unit too close to the barcode may not register properly and holding the device too far from the barcode could cause inadvertent scans (especially if scanning from a sign-in sheet or list).

Each time a scan has been recorded you will hear a “Beep” and the scanner’s screen will display the unique ID number encoded in the barcode. This is a confirmation that your scan has been recorded. If you do not hear a sound it means that the device has not yet recognized a barcode.

When you have finished scanning you can click “Stop Scanning”

Your device can store up to 40,000 scans before having to be synchronized. However, we recommend synchronizing as soon as it is convenient to maintain data relevance.

4. Synch Session Data to Server

Press “Synchronize With Server” to move the session data from your portable scanning device to Closerware’s servers via the Internet.



You will see the list of one or more scanning sessions quickly scroll until all sessions have been moved to the server.

NOTE: Your scanning device must have a properly configured WLAN/Wireless or cradle-based Ethernet connection to a network with Internet access. Please consult a qualified network consultant to configure the network settings for your device(s)

If your device should return an error concerning network connectivity, please consult your local network administrator. This most likely means that your portable scanning device does not have a proper connection to your network.

If your device should return an error about an invalid login please contact Closerware support for assistance in updating your scanner’s configuration settings.