IOWA

SWIPE USER MANUAL

Updated 12.1.2022

IOWA

TABLE OF CONTENTS

IOWA

SWIPE 2.0

Swipe 2.0 is utilized by departments and groups across campus to collect attendance information from students, faculty, and staff (e.g., at events, advising appointments, etc.). Use of Swipe across the Division of Student Life is intended to:

- Enable staff members to better track student, faculty and staff engagement with programs and services.
- Provide for multi-level assessment and reporting:
  - Individual student/faculty/staff
  - Student/faculty/staff groups/cohorts/lists
  - Department specific
  - Across departments

Support

Swipe, created and supported through ITS, allows students, faculty, or staff to scan into programs and services with their Iowa One Card (or HawkID if they do not have their card). Swipe interfaces with university systems, enabling departments to connect attendance data with demographic information.

Cost

Swipe is a browser-based application that is free to use. Departments are required to purchase hardware (tablets, laptops, etc.) that will be used to run Swipe, and prox card readers that allow participants to scan into events using an Iowa One Card.

Reporting

Swipe can provide some basic dashboard information (number of events; number of attendees; duration of visit; time of departure; etc.). More robust reporting can be found on department specific dashboards on **Campus Data**. Aggregated Swipe information will help departments answer the following questions:

- Who is utilizing our programs and services?
- What student/faculty/staff populations could we expand our programs and services to?
- How can we target outreach and communication methods to reach specific student/faculty/staff populations?

Training

All Swipe user types, except the Site Host user type, are required to be FERPA trained before accessing a Swipe site. Contact Teri Schnelle (**teri-schnelle@uiowa.edu**) if you have any questions.

IOWA

FERPA

FERPA training is required to access Swipe data.

- Staff members can complete the employee training through the Employee Self-Service portal.
- Student employees can follow this link:
  https://compliance.hr.uiowa.edu/my_training/course_enroll_details/WFERPA
- Students who are not employee can follow this link:
 **https://compliance.hr.uiowa.edu/my_training/course_enroll_details/FERPA1**

Assistance

If you have any questions or need any assistance, contact Teri Schnelle (**teri-schnelle@uiowa.edu**) or Brandon Mills (**brandon-mills@uiowa.edu**).

The Swipe 2.0 Admin website: **https://apps.its.uiowa.edu/swipe2**

Administration

When you log into Swipe 2.0, the default home screen is the "Dashboard screen"
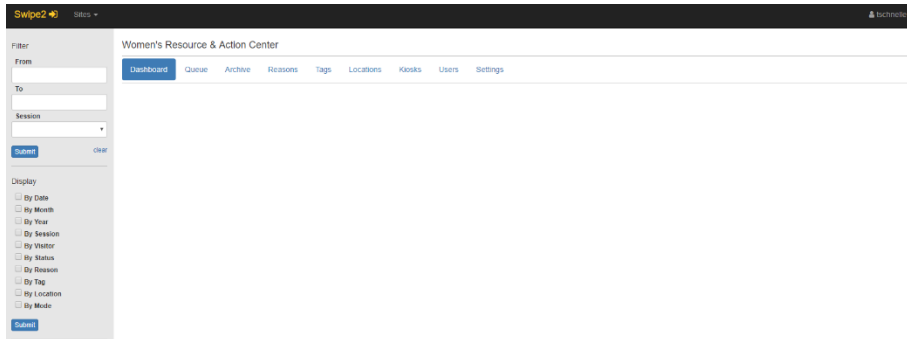
Dashboard (all access levels)

The **Dashboard's** default provides a snapshot of attendance data as of the current day. The **Filter** tab allows you to filter by different attributes (Tag, Location, etc.). The **By Tag** filter captures attendance by programs. Data on the dashboard page reflects unique visits, not unique visitors.

Queue (all access levels)

The **Queue** shows participant information after they have signed in before being moved to the **Archive**. If you wish to bypass this step, it can be selected to auto-complete on the Kiosk set-up page. Participants can be manually entered by clicking the "Sign in" button and selecting the "By ID" tab. You need a participant's HawkID or university ID number. The participant's sign-in date & time stamp, location, tags, reasons, and advisor can be selected. Similarly, you can select "By ID Card" and the visitor should scan their Iowa One Card on the prox card reader. The resulting page will allow you to complete the administrative sign-in of the visitor as if you chose the "By ID" tab and entered their HawkID or UID.

IOWA

Sign In

By ID   By ID Card   By ID List   Anonymous

Hawkid or University ID

[   ]

[Continue]

Sign In by ID List

	ID	Visitor
☑	tschnelle	Schnelle, Teri

Sign In Date/Time ✱

[   ]

Location ✱

[▼]

Advisor

[▼]

Status ✱

[Signed In   ▼]

Details

Reason   **Tags**

[add]

A participant's status can be manually changed from "Signed In" to "Completed" within the Queue to be added to the Archive.

[delete this visit]

« ‹ › »

Status

Signed In
Completed
Removed

IOWA

You can Bulk Upload participants after the program by selecting the "By ID List" tab. This allows you to copy/paste a list of UID's or HawkID's, select the sign-in date & time stamp, location, advisor, status, tags, and reasons, to be uploaded to Swipe all at once.

Bulk Operation

⦿ Update
◯ Delete

Status ✱

Completed   ▾

Details	
Reason	**Tags**
	add

Some sites include an "Anonymous" option, where a static number can be added to Swipe to capture the number of individuals who attended a program but do not have a HawkID (i.e., community members, alumni, etc.).

Sign In

By ID	By ID Card	By ID List	Anonymous

Use this feature to create visits for public visitors whose identity is not known to the university (i.e. they do not have a hawkid/univid).

This will result in the creation of visit records in Swipe without identified visitors.

Continue

Archive (Site Admin)

The **Archive** shows all of the completed attendance for the selected date range. In the **Filter** tab, you can search for a specific participant, the status (completed or removed), reason, tag, context, and location.

A participant record can be updated by clicking on the participant's name. Any of the participant's details for the visit can be updated. Participants can be removed from the **Archive** by clicking the checkbox next to their name, scrolling to the bottom of the page, and clicking delete.

A set of records can also be updated using Bulk Update. Bulk Update allows you to update the reason, tag, and status for a set of participants that was incorrect or incomplete.

Manual changes to the sign-out times of participants can be made within the **Metadata** tab of the Archive.

IOWA

Reasons (Site Admin)

Reasons capture the "why" of a participant's visit. We have created a standard Swipe reason "Attend a Division of Student Life Program" since for most program/services this is the only reason participants are there. If there are multiple reasons you would like participants to choose from you can add additional reasons by selecting "Create," choosing "Local reason to this site only," typing in the reason (short and long description), and selecting "Active" under the Current status, and then selecting "Submit."

Tags (Site Admin)

Tags are the "what" of a student/faculty/staff visit, i.e., the program they are attending or service they are utilizing. New tags can be added by selecting "Create," choosing "Local tag to this site only," and selecting "Active" under Current status, and then selecting "Submit."

IOWA

Create

Choose the type of tag you'd like to create ✱

○ Mapped to a standard swipe tag
○ Local tag to this site only

Status

Current ✱

○ Active
○ Inactive

[Submit]

Locations (Site Admin and Site Kiosk Support)

Each kiosk is set to a location. You can create as many locations as needed to cover each location for your programs and services. Locations should be actual physical locations like the IMU. Use the **Create** button on the right to add locations.

## Kiosks (Site Admin and Site Kiosk Support)

For each kiosk, you will need to configure that workstation (e.g., laptop, computer, tablet) into a kiosk. The next pages have instructions with screenshots of the system. Once you have created a kiosk you can use that kiosk repeatedly. Simply update the event information in the kiosk. Do not create a new kiosk for each new event.

When you are first creating a new Kiosk:

- Click the **Kiosk** tab and select **create**.
- **Description**: Name the Kiosk (e.g., WRAC Kiosk 1). Visitors will not see the name. Once you click **Submit**, you will need to click on **approve.** Only a site admin can approve a kiosk.

Configuring a Kiosk for an Event:

- Select a **Location.**
- **Visit Context Note**:
  - Use the visit context note to add additional information about the program. Potential context notes could include more specific program name, date, and host information.
- **Enable prox card reader for sign-in:** Allows visitors to sign in using their Iowa One Card. If you do not click this box, the default is for visitors to sign-in with their HawkID.
- **Enable contactless sign-in**: Will display a QR code on the sign-in screen so visitors can sign in by scanning the code with their phone. This feature allows visitors to sign-in without having to come into contact with a high touch kiosk and is also useful for visitors who do not have their Iowa One Card with them.

IOWA
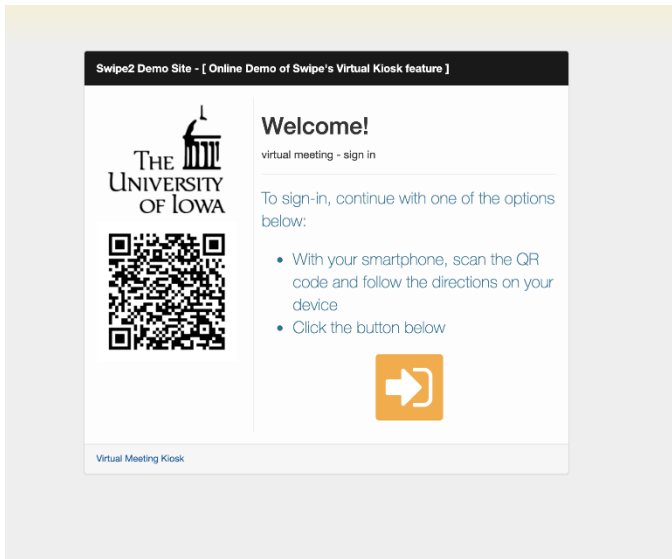
- **Signout Support:**
  - o Select the sign out option you wish to assign to the kiosk (None, With Confirmation, or Express).
  - o Departments that are tracking "time in" and "time out" information will want to configure kiosk to include a sign-out option (With Confirmation or Express).
    - **None**
      - For events that require visitors to sign-in, but do not require visitors to sign-out. Participants will be automatically added to the archive if **rules:CompleteVisit** is selected in the Post Sign-In Rule Configuration section. This option does not allow for duration of time spent at the activity/service to be calculated.
    - **With Confirmation**
      - After signing in, participants will automatically be placed in the Queue. When participants swipe to sign-out, a confirmation message will appear, and the participant must select to confirm their sign-out.
    - **Express**
      - After signing in, participants will automatically be placed in the Queue. When participants swipe to sign-out, no confirmation will appear, and they will signed out immediately.
  - o Only "With Confirmation" and "Express" options allow for an exit-survey to be included during the **Post Sign-Out Rule Configuration**. If you are interested in adding a post sign-out survey, contact **Teri Schnelle**
  - o For participants who sign-in but forget to sign-out, status changes can be manually updated in the **Archive** within the **Metadata** tab.
- **Message of the Day:** The default welcome message when visitors sign-in is **Welcome!** If you would like it to say something different, type it in the **Message of the Day** box.
- **Virtual Support:** This feature is intended for use when engagement with visitors is online via a Zoom meeting. This can be used for both programs/events and also for one-on-one virtual

meetings. Tip: Create a new kiosk to use as a virtual kiosk instead of enabling this feature for an already existing physical kiosk.

- o Check the "Enable virtual support for remote sign-in" checkbox
- o Enter a "Name" for the virtual kiosk – this is displayed on the welcome page
- o Enter a unique "Path" for the virtual kiosk – this is used to generate the "Virtual Kiosk Web Link" (URL) which you will provide to your visitors and must be restricted to lower case letters, digits, and dashes only.
- o The configuration of Zoom meetings for a Swipe kiosk or an advisor requires the full Zoom meeting link in the "Zoom Meeting Link" section.
- o Your Zoom meetings should be configured to use the waiting room for all attendees and restrict attendees to University of Iowa authenticated users.
- o For hosted programs or events with multiple visitors:
  - ▪ The visitors will click on the "Virtual Kiosk Web Link" that you provided for the kiosk
  - ▪ Once the visitors sign-in on this virtual kiosk, they will be redirected to the Zoom for the Zoom meeting that you configured in the "Post Sign-In Rule Configuration" for the kiosk
- o Additional configuration for one-on-one virtual advisor meetings must be done for each advisor in Swipe.
  - ▪ To meet with your advisees for virtual online advising, it is recommended to create a standing, recurring Zoom meeting with no fixed time instead of using the advisors' PMI
  - ▪ On the "Settings" tab, click the "Zoom" tab, enter your Zoom meeting link, and click the blue "Submit" button to save your changes
  - ▪ For one-on-one virtual advisor meetings:
    - Each advisor should be logged into both the Swipe site and Zoom
    - Advisors should monitor the "Queue" tab for their advisees once they sign-in for their appointment, and if applicable, monitor for drop-ins as well
    - Once an advisor is ready to meet with an advisee (appointment or drop-in), click the advisee's name in the list on the "Queue" tab
    - On the resulting "Visit" page, if the advisee is a drop-in, the advisor should assign themselves as the advisor for the visit
    - Change the status to "Ready" – this will inform the advisee that the advisor is now ready to meet with them in a Zoom meeting
    - The advisor can click the green "Join the Zoom meeting now" button to meet with the student in Zoom – note the button text will also contain the URL for the Zoom meeting in case you need to copy it to the clipboard

- **Hours of Operation:**
  - o Specifying hours of operation allows you to restrict visitor sign-in to certain periods. This may be useful in an advising office context so that visitors can sign-in only during your published office hours. You would typically not use this feature in other contexts.
  - o Leaving the field blank will place no restrictions on sign-in. The kiosk will accept visitor sign-ins at any time of the day.

IOWA

- o   To restrict hours of operation, enter one or more-time ranges, separated by a comma, that identify when visitors may sign-in. Each time range must be valid 24 hour start time, a dash, and a valid 24-hour end time.
- **Tag Configuration**:
  - o   If needed, type in instructions for visitors in the **Instructions** box. This is what visitors will see on the sign-in page when they are selecting a program. An example: "Please select which program you are here for:"
  - o   Select **Include Selections** in the **Filter Mode** box.
  - o   In the **Filter** box, select the appropriate Tag (i.e., program). If you need to select multiple programs click on a program, then hold the **Ctrl** key to select additional programs.
  - o   If you want to automatically select a program(s) for the visitor when they sign-in, click the **automatically select the tag or tags identified by your filter** box.
- **Reason Configuration:**
  - o   If needed, type in instructions for visitors in the **Instructions** box. This is what visitors will see on the sign-in page when they are selecting reason(s). An example: "Please select the reason(s) for attending today:"
  - o   Select **Include Selections** in the **Filter Mode** box.
  - o   In the **Filter** box, select the appropriate Reason. If you need to select multiple reasons click on a reason, then hold the **Ctrl** key to select additional reasons.
  - o   If you want to automatically select a reason(s) for the visitor when they sign-in, click the **automatically select the reason or reasons identified by your filter** box.
- **Post Sign-In Configuration**: If this area is left blank, when visitors sign-in their attendance information will go to the **Queue** page. Attendance information in the **Queue** page allows you to edit a visitor's information for their visit.
  - o   To bypass the **Queue** page, click on the down arrow under **Class** and click on **rules:CompleteVisit.** When this is selected, a visitor's visit information will go directly to **Archive**. When information is in **Archive,** only Site Admins can edit a visitor's attendance information.
  - o   The **CompleteVisit** rule cannot be used if a **Signout Support** option is selected.
  - o   Kiosk administrators can use this step to include a post sign-in survey. After the participant completes the sign-in, the screen will automatically re-direct to the survey. Please contact **Teri Schnelle** for configuration.
- **Post Sign-Out Rule Configuration:**
  - o   Kiosk administrators can use this step to include a post sign-out survey. After the participant completes the sign-out through either option, the screen will automatically re-direct to the survey. Please contact **Teri Schnelle** for configuration and sign-in/sign-out survey related questions.
- Click **Submit.** It will bring you to a new screen. Select the **become this kiosk** to go to the actual sign-in page for visitors if needed or restart your kiosk (tablet, computer, etc.) to update the configuration.

IOWA

Women's Resource & Action Center

Dashboard   Queue   Archive   Reasons   Tags   Locations   **Kiosks**   Users   Settings

create

	Description	Location	Last Accessed	Approval	
copy	WRAC Laptop 1	WRAC	2018-08-13 11:15:22 AM from 128.255.49.25	2018-08-14 08:14:14 AM by tschnelle	delete

Edit   become this kiosk ⊘

Description ✱

WRAC Laptop 1

Click become this kiosk to launch the sign-in page on the kiosk.

Once kiosks are approved, a kiosk can be updated (change reason, tag configuration, etc.) and changed at any time.

IOWA

Name of the kiosk- visitors will not see the name if you are creating the kiosk for the first time.

Select your location for the kiosk. Locations are created in the Location tab.

Provide additional program information in the Visit Context Note tab.

Description ✳

Teri's Laptop

Location ✳

Population

Visit Context Note

This will be recorded as the visit context on all sign-ins from this kiosk

Welcome Configuration

☐ **Enable prox card reader for sign-in**

☐ **Enable contactless sign-in**

If this is checked, a QR code is displayed to allow the visitor to sign-in by scanning the QR code with their smart phone.

Signout Support ✳

None

Message of the day

html markup allowed

Kiosk Preview

Welcome!

Click Enable Contactless Sign-in to generate a QR code visitors can use to sign-in

Select a sign-out option from the drop-down list.

A preview of your message on the kiosk. Visitors see this message when they sign-in.

Click Enable Prox Card Reader for Sign-In if visitors will be able sign-in with a prox card reader. This will give the prox card sign-in as a default. If visitors do not have their card, they can sign-in with their HawkID.

Create a more customized message for visitors at sign-in.

IOWA

Your list of programs that you created on the Tags page will show up here.

If you want the kiosk to automatically select a program, click on the program and click on Automatically select tag or tags identified by your filter.

If needed, type instructions in for visitors to see when they are signing in.

Your list of reasons that you configured on the Reasons page will show up here. All active reasons will show up in the list.

If you want the kiosk to automatically select a reason, click on the program and click on Automatically select the reason or reasons identified by your filter.

Tag Configuration

Instructions

Filter Mode

Include Selections ▾

Filter

☑ Automatically select the tag or tags identified by your filter

Reason Configuration

Instructions

Filter Mode

Include Selections ▾

Filter

☑ Automatically select the reason or reasons identified by your filter

Post Sign-In Rule Configuration

Class

After a visitor sign in, their visit goes to the Queue page. To bypass the Queue page and have visits be sent directly to Archive, select rules: CompleteVisit in the drop-down menu for Class. The CompleteVisit rule cannot be used if a Signout Support option is selected.

Post Sign-Out Rule Configuration

Class

▾

Submit

cancel

Click Submit when you are all done.

Use the Post Sign-Out Rule Configuration to include an exit-survey. After a visitor signs-out, the screen will automatically re-direct to a survey.

IOWA

Women's Resource & Action Center

Dashboard | Queue | Archive | Reasons | Tags | Locations | **Kiosks** | Users | Settings

	Description	Location	Last Accessed	Approval	
copy	WRAC Laptop 1	WRAC	2018-08-13 11:15:22 AM from 128.255.49.25	2018-08-14 08:14:14 AM by tschnelle	delete

create

Edit   become this kiosk ⊘

Description ✱

WRAC Laptop 1

Click become this kiosk to launch the sign-in page on the kiosk.

Women's Resource & Action Center

Dashboard | Queue | Archive | Reasons | Tags | Locations | **Kiosks** | Users | Settings

	Description	Location	Last Accessed	Approval	
copy	WRAC Laptop 1	WRAC	2018-08-13 11:15:22 AM from 128.255.49.25	2018-08-14 08:14:14 AM by tschnelle	delete

create

Click Copy to duplicate the settings from one kiosk to another creating another a new one.

Click Delete to delete a kiosk.

IOWA

Users

There are a variety of distinct roles available in Swipe (see a detailed list below). Review and select the appropriate roles for everyone. Remember to review your list of Users on a regular basis to remove access for individuals who should no longer have access to the Swipe site. To remove access, change their status from Active to Inactive.

- **Site Admin**
  - This role grants the user the ability to perform all administrative configuration tasks as well as the ability to manage the current queue of visitors and edit and export archived data.
- **Site Operations**
  - This role allows the user to manage the current queue of visitors.
- **Site Advisor**
  - This role identifies the user as an advisor to the Swipe system, which will allow the user to be assigned as the advisor for a visit. This role by itself does not allow the user to manage the current queue of visitors. You will need to grant the "Site Operations" role to the user if they need that privilege as well.
  - Your Swipe site may or may not have this permission level.
- **Site Host**
  - This role allows a user to perform simple kiosk configuration on a kiosk device. This is useful if your site offers programs/events, and you want the user to be able to configure a kiosk for a specific program/event in order to track attendance.
  - This is the only user permission that does not require FERPA training.
- **Site Kiosk Support**
  - This role allows a user to perform administrative configuration of locations and kiosks. Grant this role to a user if they need these privileges but you do not want to grant them the "Site Admin" role, which gives them all administrative configuration privileges.
- **Site Data Steward**
  - This role identifies the users who perform data steward functions for the site. This includes authorizing access to Swipe data in the data warehouse and the business intelligence solutions.
  - Teri Schnelle (OVPSL) and Brandon Mills (Division ITS) are the data stewards for all DSL Swipe sites.
- **Site Data Warehouse Access**
  - This role will grant the user's existing Oracle user account the ability to access the site's data in the data warehouse.
  - Teri Schnelle (OVPSL), Brandon Mills (Division ITS), and Greg Nims (Division ITS) are the only individuals who need this access.
- **Site Business Intelligence Solutions**
  - This role will allow a user to interact with the site's data in the business intelligence solutions.

IOWA

Tips for Using Swipe

- Make sure that your device is connected to the internet.
- Bring an extension cord to ensure you can plug your device in to charge.
- If you test the system to ensure it is working, remember to delete your tests after the program, otherwise your data will be incorrect.
- There may be a small delay when participants scan their Iowa One Card, so it will take a moment until the next participant can scan their card. Make sure participants are aware of this slight delay, and wait until they see the "Welcome Message" to know they are signed in.
- If you experience technological or other issues, you can always bulk upload attendance information into Swipe after the program. If you are experiencing issues, pass out an attendance document to have participants provide their name and HawkID. See above for Bulk Upload directions.
- If you would like to connect a survey to Swipe (participants complete upon swiping into or out of a program/service), please contact Teri Schnelle (**teri-schnelle@uiowa.edu**).