ARES Connect - 2020

ARES Connect is a software database that communicates events, allows user registration in events, records participation in events and provides a record of users' qualifications/training.

Calendar and event list allow users to register for events while providing leadership with an estimate of event attendance.

The system enables recording of members participation in events that is valuable when collaborating with partner organizations/agencies.

ARES leadership uses the database to maintain records of qualifications/training, contact information, and unique capabilities for leadership to select individuals for possible special activities.

When fully implemented, ARES Connect can eliminate monthly reports which are already being provided by several Sections.

Login:

- > Vhub.at/aresconnect-xxx (where xxx is the section abbreviation) (see Appendix A for links)
 - o **Username** always use your FCC callsign
 - Password selected by users
 - If password is misplaced, try Forgot password?
 - If login issues remain, contact your Section Emergency Coordinator. If SEC is not available. email ARES Connect admins at aresconnect@arrl.org for temporary password to be activated.

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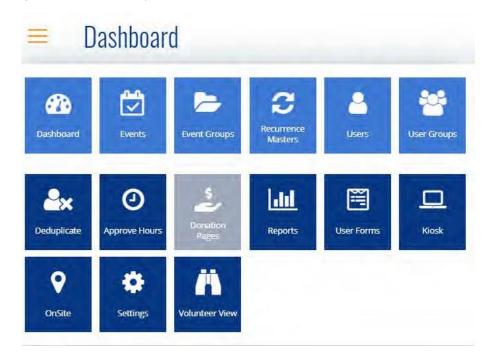
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Feedback to expand or improve this document is appreciated. Please forward it to aresconnect@arrl.org, N8SY@N8SY.com, and WB2ALJ@ARRL.net.

Dashboard - A visual overview:

The Dashboard provides quick access to all functions within ARES Connect. The list below provides a summary of functions and applications used for ARES Connect administration activities.

Note: The Dashboard can be reached at any time when using ARES Connect by clicking the three-bars on the top-left-hand side of the page and left of the word "Dashboard." This icon is called the "**Hamburger**," and is used as the "Menu" link for most websites today.



Overview of Dashboard Functions:

Dashboard – Click to open a list of events from current date forward for the next 50 events. There is access to the **Create Event** and **See All** events sections along the top.

Events are displayed by title with sub-text indicating the originator name, County or Section. The date, local time, and estimated duration of events are listed. Clicking the three gold-colored dots on the right will open a box that provides shortcut access to: *View Event, Edit Event, Preview Event, Open Sign In Sheet, Export Sign In Sheet, View Related Instances*, and *Delete Event*.

Events - Click for immediate access to **Events** with the ability to find or filter events, plus the ability to view events as a list or in calendar form on the top line, right side. It also has a shortcut link to **Create Event** if you are an Administrator. Opening an event with a click on the title will provide more information. Clicking the three gold-colored dots on the right will open a box that provides shortcut access to **Delete Event** if you are an Administrator.

Event Groups - Click to open a list of event groups, including Counties, with subcategories of *Communications Emergency, Community Events, Exercise, Meeting, Net, SKYWARN*, and *Training*, as well as Section subcategories that are used for reporting. The ability to find events and/or filter events within a sub-category is possible.

Overview of Dashboard Functions - Continued

Recurrence Master - Click to access the event recurrence master list. Clicking on an event will provide a list of scheduled events from current date forward. The top box provides the ability to change the viewing *start date* or select *Next Year, Next Month, Today, Last Month, This Year, Last Year, or All.*

Clicking **Add Instances**, by way of the gold-colored dots, provides access to the tools to setup a recurring event on *Daily*, *Weekly*, *Monthly*, or *Yearly* basis with start and end dates.

Users - Click to gain access to a list of all section users including *names*, *email*, and *user group membership*.

- The top section permits filtering the list for your needs.
- Entering call sign will provide an individual's data. Clicking the three gold-colored dots on the right will open a box that provides shortcut access to some administrative functions.
- **Note: Do not delete a user** locally or at Section level. It must be accomplished at ARRL Headquarters level. Contact arrl.org to make this request.
- Clicking the **Filter Funnel** will provide access to a series of filter tools including: *Select User Group, Approval Process for Levels, New Volunteers, Section Administration, County Administration,* and select subcategories.
- The top-right corner displays a **Create New User** button, which will be explained later in the summary.

User Groups - Click to gain access to a list of User Groups including: *Approval Process for Levels, New Volunteers, Section Administrators, County Administrators, Self-Selected Groups, and County Volunteers.* Clicking on the three gold-colored dots on the right will open a list of available functions: *View User Groups, Edit User Groups, Add Subgroup, Delete User Groups.*

Deduplicate – Available to Superusers only.

Approve Hours – Useful if volunteers report hours for group approval when inputted by volunteers. ARES volunteer hours can be approved within the Event section by Emergency Coordinators.

Donation Page – Superusers only

Reports – Section contains **Formatted Reports** and **Unformatted Reports** that can be extracted from the ARES Connect database.

- Formatted Reports can extract the following:
 - o **Birthdays** within date range and Section or specific county.
 - Event Participation by Event (V1) within date range, displays all events, users, and hours from subcategories such as county or section. *Useful for preparing monthly* reports.
 - Event Participation by Event (V2) within date range, displays all participants (users), and hours, from subcategories such as county or section.
 - Event Participation by User within date range, displays *User Groups, Event Groups, all Users, email address* and *participation* as well as *duration, number of events, and hours*
 - Event Summary (V1) within date range and Event Group, displays each Event, date/time, contact, users and hours from subcategories such as county or section.
 Useful for preparing monthly reports.

Overview of Dashboard Functions - Continued

- Event Summary (V2) within date range and Event Group, displays each Event, date/time, contacts, users and hours from subcategories such as county team or section.
- Last User Activity lists user activity for a specific date.
- Multi-Event Sign-In Sheet provides Multiple Event Sign-In Sheets for County team or Section for a specific date range. Hint: may be useful for some exercises/drills or training sessions.
- User Group Membership for User Groups, (such as County), provides a list of all members that are within the ARES Connect database with call sign, name, email, training levels and positions, if any. Useful for ECs and AECs.
- Unformatted Reports tools can extract the following:
 - O Raw Event Registration Data displays details on events, user groups, users, and hours in CSV format. Can be used by Sections to produce Monthly reports. This numerical data is extracted from a County's events, users and hours.
 - User Roster provides details on user participation in events and hours with output in CSV format.

User Forms – Superuser use only.

Kiosk – Can be activated in settings and used for local volunteer's input without affecting their account, such as at meetings, training sessions or events.

Settings – Can enable the Kiosk and **SAVE**

Volunteer View – displays current event list to enable users to sign-up or to check if they have previously signed up for an event.

R = 03/13/2020

How to instructions for SECs, ECs, and other Administrators:

Create New Event *Note - This is for New Events not in the Master list.*

> Click Events on Dashboard "hamburger" to access events and click the Create Event button at top:



- ➤ Select an **Event Type** either **One-Time Event** or **Recurrence Master**.
 - One-Time Event provides tools for inputting event information step by step.



- Enter the following data:
 - Event Name
 - **Event Group** ~ group responsible for event, such as local County or Section.
 - **Points** ~ recognition points, if used in the Section.
 - **Date & Time** ~ using calendar and local time (AM or PM).
 - Event Details ~
 - Short Description it will appear on event list and calendar.
 - o **Detailed Description** it can contain more information on event.

Hint ~ *Copy Short Description to Detailed and add additional information, such as net frequency and tone.*

- Location ~ indicate location of the event, as necessary.
 - Hint ~ If an event is at an unusual location, it is possible to display a map location by checking the box beneath "Location."
- **Event Contact** ~ name of individual coordinating the event.
- Event Slot Limit ~ maximum number of users allowed.
 - *Hint* ~ *useful if there is a limit, such as room seating.*
- **Allow Users to Self-Register** ~ indicate **Yes** if you desire users/participants to sign themselves up for the event. *Hint* ~ *Provides leadership the ability to know approximate attendance at events and ability to print an Event Roster*.
- Self-Registration Cut-off ~ select desired process from drop-down menu for time limit
- Self-Cancellation Cut-off ~ select desired process from drop-down menu for time limit.
- **Event Visibility** ~ control visibility of the event if registration is disabled, with drop-down.

- **Hours Self-Reporting** ~ control if self-reporting of hours by users is permitted or blocked. If allowed, they must still be approved by leadership. If blocked, leadership must input the hours after the event.
- Email Notifications ~ Three Choices
 - Confirmation Message ~ If you desire to send a confirmation message, such as thank you or more details, enter the message in the text box, PLUS check the box below that reads: Send confirmation/cancellation email to event contact.
 - Reminder Email ~ If you desire to send a reminder message type it into the text box. Note: The default setting is: Automatically send reminder to registered users

 3 Days prior to the event. Clicking the 3 Day permits it to be modified.
 - O Thank You Email ~ If you desire to send a thank you email after the event, enter the text in the box. Note: The default setting is: Automatically send thank-you email 24 hours after the event completes.
 - Hint ~ Thank-you notes are usually appreciated by all.
 - Waivers ~ Not normally utilized.
 - SAVE

Recurrence Master provides tools for inputting event information step-by-step Hint ~ This is ideal for any events the happen more than once. It saves time and effort overall. Once a Recurrence Master event is created, it can be saved and retrieved from DASHBOARD.

Create New Event



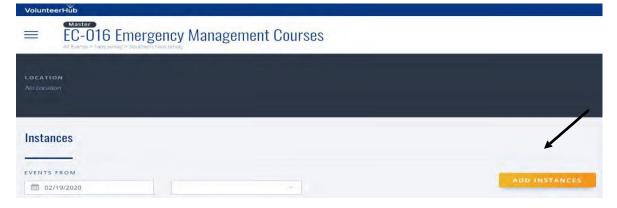
Enter the following data:

- Event Name
- Event Group ~ group responsible for event, such as local County or Section.
- **Points** ~ recognition points, if used in the Section.
- **Date & Time** ~ using calendar, and local time (AM or PM).
- Event Details ~
 - Short Description it will appear on event list and calendar.
 - Detailed Description it may contain more information on event.
 Hint ~ Copy Short Description to Detailed and add additional information, such as net frequency and tone.
- Location ~ indicate location of event, as necessary.
 Hint ~ If an event is at an unusual location, it is possible to display a map location by checking the box beneath "Location."

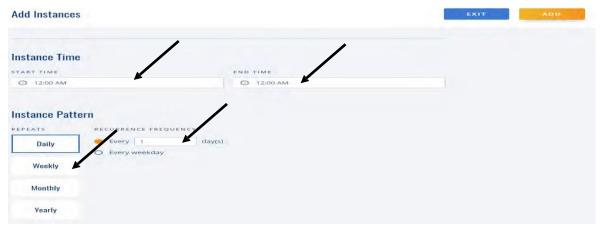
- **Event Contact** ~ name of individual coordinating the event.
- Event Slot Limit ~ maximum number of users allowed.
 - *Hint* ~ *useful if there is a limit, such as room seating.*
- **Allow Users to Self-Register** ~ indicate **Yes** if you desire users/participants to sign themselves up for the event.
 - Hint ~ Provides leadership the ability to know approximate attendance at events and ability to print an Event Roster.
- **Self-Registration Cut-off** ~ select desired process from drop-down menu for time limit
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- Event Visibility ~ control visibility of event if registration is disabled, with drop-
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- Email Notifications ~ Three Choices
 - Confirmation Message ~ If you desire to send a confirmation message, such as thank you or more details, enter the message in the text box, PLUS check the box below that reads: Send confirmation/cancellation email to event contact.
 - o Reminder Email ~ If you desire to send a reminder message type it into the text box. Note: The default setting is: Automatically send reminder to registered users 3 Days prior to the event. Clicking the 3 Day permits it to be modified.
 - O Thank You Email ~ If you desire to send a thank you email after the event, enter the text in the box. Note: The default setting is: Automatically send thank-you email 24 hours after the event completes.
- Waivers ~ Not normally utilized.
- **SAVE & CONTINUE** ~ *Hint* ~ *Save & Continue is at the top-right corner.*



Note ~ Master of Event created needs to have Instances established.



Click on Add Instances for selections.



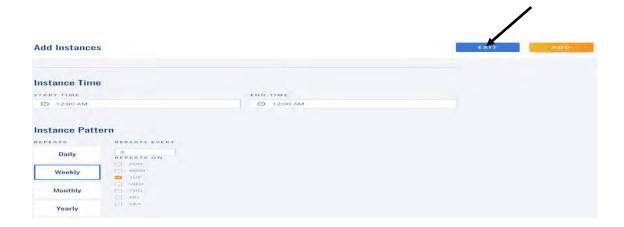
- Select the **Instance Pattern**.
 - o Enter Start Time and End Time.
 - o **Repeats** ~ Daily, Weekly, Monthly or Yearly.
 - Repeats Every ~ various days of the week.
- Add Instance Dates.



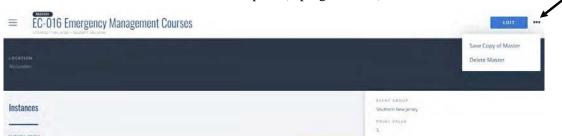
- Select **Starts On** ~ date desired to start the event
- Select **Ends** ~ *Two choice's*
 - End after ____instances. Example above indicates "3."
 - End by ~ could be used for end date.
 Hint ~ ideal for setting up recurrent events for an extended period of time.

Example has a training event being held Weekly, on Tuesdays, starting on March 24, and ending in 3 weeks.

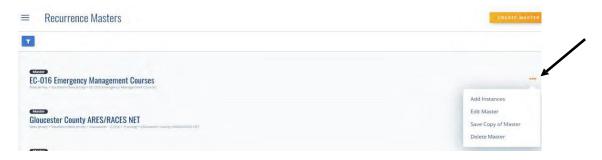
- Select **ADD** at the top of the screen.
- Then Select **EXIT**.



• Click **SAVE** button when complete (top right corner).



Return to DASHBOARD; click on Recurrence Masters to verify.

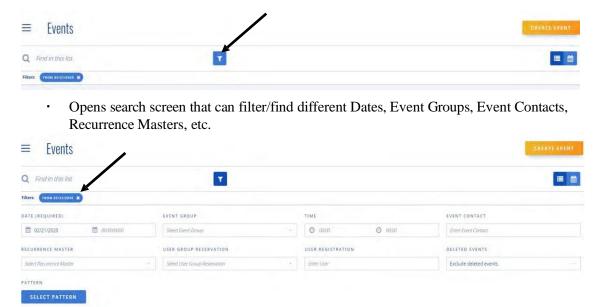


• Clicking the **3 Gold Dots** on the right-hand side of the event will allow returning to the **Instances** screens for future editing.

Hint ~ Recurrent Events can be retrieved and edited from the **DASHBOARD** Recurrence Masters list.

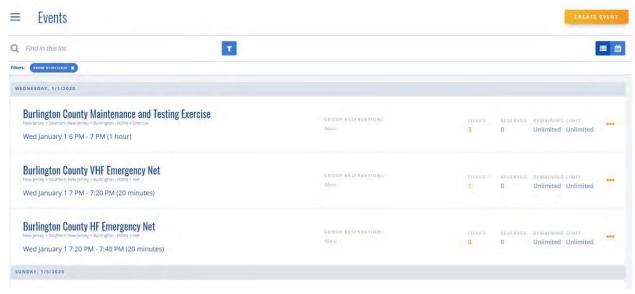
Potential Challenge Finding Events

➤ When opening Events, events which occurred prior to those appearing in either List or Calendar format can be found by simply clicking the **Funnel** icon:



To change the date range on screen, simply type desired date and click on the **Funnel** icon. This process takes a few seconds to complete.

Example below displays events which date back to 01/01/2020 for the entire Section.



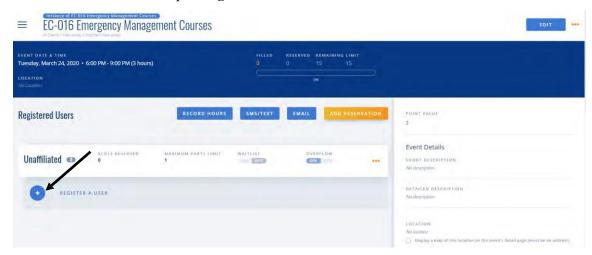
Hint ~ *other searches within Events can be accomplished similarly.*

Add Users to Event Process used to add users to a created event by ARES Connect Administrator.

➤ Click **Events** on hamburger icon to access events list, select the events lists, and locate events:

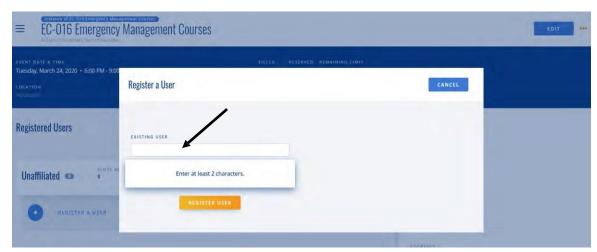


O Click on Event Name to open **Registered User** screen:



Note: **Registered Users** screen can be used to register users (+), record hours, and send messages via text or email.

• Click on + **Registered A User** to open user search window:



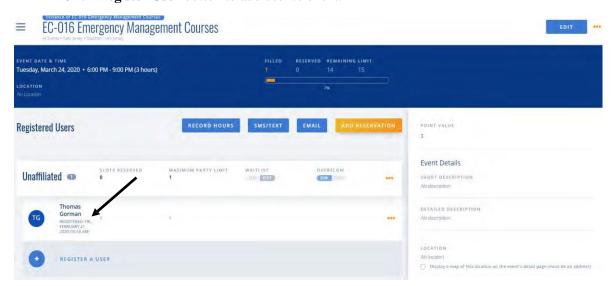
Type the call sign of the user and the user's name will appear.



• Either click on name or press enter on keyboard to move name and call to **Existing User** window:

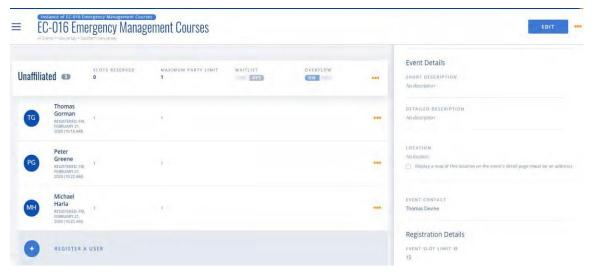


• Click **Register User** button to add user to event:



• Repeat procedure above for each attendee. If users pre-register for an event, their names will be on the list when initially opened.

Note ~ following screen shows three users added to this event:



• If a pre-registered user was not able to attend the event, the individual can be removed from the event by clicking the three gold dots to the right of the user's name. A drop-down menu will appear which permits the Administrator to **Edit Registration** or **Remove from Event**.

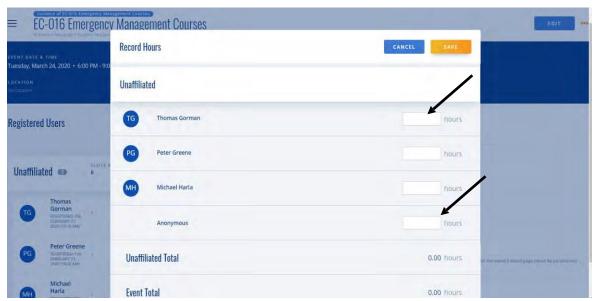
EC-016 Emergency Management Courses EC-016 Emergency Management Courses SLOTS RESERVED MAXIMUM PARTY LIMIT WAITLIST OVERFLOW Unaffiliated ON DE DIN OFF **Thomas** Gorman TG REGISTERED: FRI, FEBRUARY 21, 2020 (10:18 AM) Peter Greene REGISTERED: FRI, FEBRUARY 21, 2020 (10:22 AM) Michael Harla REGISTERED: FRI, FEBRUARY 21, 2020 (10:22 AM) **Edit Registration** REGISTER A USER Remove from Event

Hint ~ 1) If you are adding users after an event, as well as their hours, this is the screen to use. You may have to scroll to the top of the screen for access to the **Record Hours** window. 2) Another means for reaching members within a subgroup, such as County, can be achieved by clicking the **Add Reservation** button and selecting the specific subgroup.

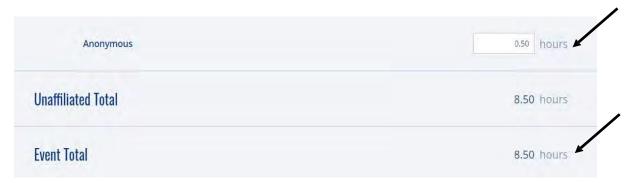
Recording Hours for Completed Events

If entering through the Dashboard, click the hamburger icon and select **Events** to find the specific event from the Event list.

If hours are to be added to Registered Users, click the Record Hours button.



- Enter event hours in the boxes to the right of each users' name.
 Note ~ If your event, such as a net, had individuals presently not in the ARES Connect database, their hours should be added in the Anonymous box.
- Press SAVE at top of the window.
 Hint ~ 1) Type numbers into box, then press the 'Tab" key to speed up the process.
 2) totals do not add until SAVE at the top of the window is pressed. The total can be verified by reentering the Record Hours window to see Event Totals. Sample of totals below:



Adding Users

From **Dashboard**, click **Users**:



Click **Create New User** button to create a new user.



Enter as much of the following information as possible:

Username - Use FCC Call Sign for Username

Password, if user, or establish a temporary password that should be changed by user on first login into ARES Connect.

Full Name

Home Address

County

Email Opt-In - Yes, if the user desires to receive reminders, thank yous, and other messages from the system. Otherwise, select **No.**

Primary Phone Number

Alternate Phone Number

Emergency Contact Name

Emergency Contact Telephone Number

License Class

Years Licensed

 \mathbf{HF} – Dropdown ~ Does the operator use HF?

Net Control - Dropdown ~ Does the operator have experience as NCS?

CW – Dropdown ~ Does the operator have experience with CW?

Radio Email – Dropdown ~ Does the operator have experience with radio email, such as Winlink?

APRS – Dropdown ~ Does the operator have experience with APRS?

Packet – Dropdown ~ Does the operator have experience with Packet?

Mesh Networking – Dropdown ~ Does the operator have experience with Mesh Networks?

FLDGI – Dropdown ~ Does the operator have experience with FLDGI software?

Digital Voice – Dropdown ~ Does the operator have experience with digital voice systems, such as DMR, and Fusion/C4FM?

Message Handling – Dropdown ~ Does the operator have experience with traffic handling?

ARRL Field Appointments – Lists appointments such as AEC, ASEC, VE, Instructor, etc.

EC-001 - Dropdown ~ Has user completed the ARRL EC-001 "Introduction to Amateur Radio Emergency Communications" course?

EC-016 - Dropdown ~ Has user completed the ARRL EC-001 "Public Service Emergency Management for Radio Amateurs" course?

PR-101 - Dropdown ~ Has user completed the ARRL PR-101 "Public Information Officer" course?

SKYWARN - Dropdown ~ Has user completed the NWS SKYWARN basic training?

AUXCOMM - Dropdown ~ Has user completed the DHS Auxiliary Communications training program?

100 - Dropdown ~ Did user complete the FEMA ICS-100 course?

200 - Dropdown ~ Did user complete the FEMA ICS-200 course?

300 - Dropdown ~ Did user complete the FEMA ICS-300 course?

400 - Dropdown ~ Did user complete the FEMA ICS-400 course?

700 - Dropdown ~ Did user complete the FEMA ICS-700 course?

800 - Dropdown ~ Did user complete the FEMA ICS-800 course?

FEMA Professional Development Series - Dropdown ~ Did user complete the FEMA Professional Development series of courses?

CPR – Dropdown ~ Has user completed CPR training or refresher training in the last 2 years?

First Aid - Dropdown ~ Has user completed First Aid training or refresher training in the last 2 years?

AED - Dropdown ~ Has user completed AED training or refresher training in the last 2 years?

COML - Dropdown ~ Has user completed DHS Communication Leader training?

COMT - Dropdown ~ Has user completed DHS Communication Technician training?

General Notes – Indicate as appropriate.

Mileage Notes – Enter free form list of all travel for future reference.

Select User Group – Qualification Level, Administrative Team, memberships, team, and County.

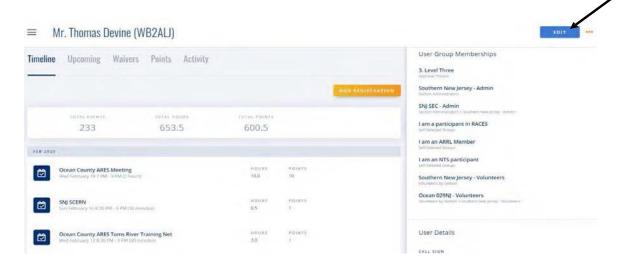
Click **SAVE** button at bottom.

Hint ~ It is usually easiest to do this with or by the user. If not, set up account with a temporary password to provide access to the user so they can complete the details at some point in the future.

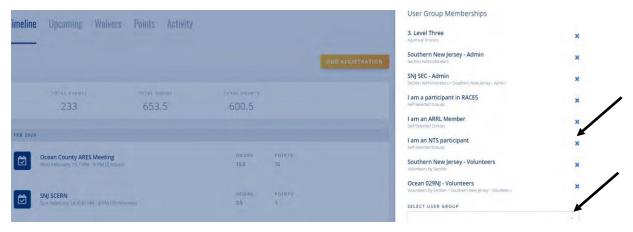
Placing New Volunteer into Subgroup

If Adding User section was fully completed, the user's Subgroups were also input.

If the account was not completed during the **Adding User** process, or if updates or changes are necessary, click **Users** from the **Hamburger** icon to see the user list. Enter calls sign of user and press enter key to view that user's details.



· Click the **Edit** button in the upper-right corner to enter the edit window.



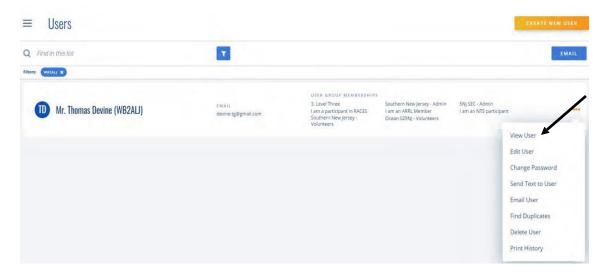
- · Review Subgroups from "Qualification Level" to "Volunteer."
 - \circ If one entry must be deleted, click the **X** to the right of the Subgroup. It will immediately be <u>deleted</u>.
 - To Add a Subgroup. or replace deleted subgroup, use the Select User Group dropdown menu.
- Save edits by clicking SAVE.

Determining User Participation Event & Hours

Click the **Hamburger** and select **Users.** Enter the call sign in the **Find in this List** box, then press the enter key on keyboard. The user should appear as follows:

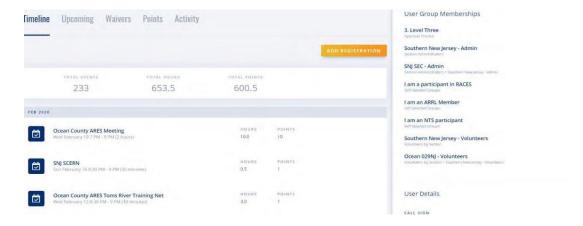


· Click the three gold dots to the right of the user. A drop-down box will appear:



Note ~ The drop-down box provides access to View User, Edit User, Change Password, Send Text to User, Email User, Find Duplicate, Delete User, and Print History.

 Click on View User. The next screen will provide a complete user history, including Total Events, Total Hours, Total Points, list of Participated Events with hours for each (current first), and the user's Subgroups on right.



Collect Summary Data for Reports

Note ~ There are two methods of collecting data for Monthly Reports. The first, manual, consists of viewing data on screen and recording for the reporting process. The second, automated, extracts data from the ARES Connect database to an Excel file, where it is filtered to provide monthly report data.

Ultimately, the goal is to eliminate monthly field reports by having all data entered in ARES Connect so that Section Leadership and ARRL Headquarters' staff can automate the reporting processes.

Manual Method

Select **Reports** on the Dashboard **Hamburger** to access Reports:

- Click on Event Participation by Event (V1)
 - Select **Date Range** typically the month for County or Section report.
 - Select **Event Group** such as County or Section.
 - If you want to show users, leave **Show Users** box checked. If it is not necessary to show users, but rather Events and Hours, uncheck the **Show Users** box
 - Click View Report.



Note ~ Screen will show the Date of Events, Events, Number of Participants, and Hours for each event, plus total hours. Please be aware this could be multiple pages.

Event Participation by Event (v1)

Date	thern New Jersey > Ocean - 029NJ Event	Expected	Harris
TOTAL STREET		200	Hours
1/5/2020 9:00am	New Jersey > Southern New Jersey > Ocean - 029NJ > Ocean County ARES NVIS Test	4	40.00
1/8/2020 8:00pm	New Jersey > Southern New Jersey > Ocean - 029NJ > SKYWARN > Ocean County Skywam Training Net	11	19.00
1/8/2020 8:30pm	New Jersey > Southern New Jersey > Ocean - 029NJ > Net > Ocean County ARES Toms River Training Net	13	23.00
1/12/2020 7:00am	New Jersey > Southern New Jersey > Ocean - 029NJ > Ocean County ARES NVIS Test	7	35.00
1/15/2020 8:00pm	New Jersey > Southern New Jersey > Ocean - 029NJ > Net > Ocean County ARES NBEMS Training Net	8	24.00
1/15/2020 8:30pm	New Jersey > Southern New Jersey > Ocean - 029NJ > Net > Ocean County ARES Manahawkin Training Net	12	19.00
1/19/2020 7:00am	New Jersey > Southern New Jersey > Ocean - 029NJ > Ocean County ARES NVIS Test	5	25.00
1/21/2020 6:00pm	New Jersey > Southern New Jersey > Ocean - 029NJ > Ocean County ARES VE Session	5	30.00
1/22/2020 8:00pm	New Jersey > Southern New Jersey > Ocean - 029NJ > Net > Ocean County ARES NBEMS Training Net	8	27.00
1/22/2020 8:30pm	New Jersey > Southern New Jersey > Ocean - 029NJ > Net > Ocean County ARES Toms River Training Net	16	21.00
1/26/2020 10:00am	New Jersey > Southern New Jersey > Ocean - 029NJ > Ocean County ARES SCERN Repeater Maintenance	3	15.00
1/29/2020 8:00pm	New Jersey > Southern New Jersey > Ocean - 029NJ > Net > Ocean County ARES NBEMS Training Net	8	24.00
1/29/2020 8:30pm	New Jersey > Southern New Jersey > Ocean - 029NJ > Net > Ocean County ARES Toms River Training Net	13	19.00
	(Events without slot limits) Subtotal	113	321.00
	Total	113	321.00
Powered by VolunteerHub	com Created 2/22/2020 2:16:01 PM		1 of 1

How to reserve slots for a user group?

User group reservations allow you to silo off part or all of an event for members of a particular user group. You can reserve slots for a user group within the **Registered Users** page of a specific event.

Step 1.

From the **Events** page, click on the event you want to make a reservation for.

Step 2.

Click the **Add Reservation** button (Figure 1).

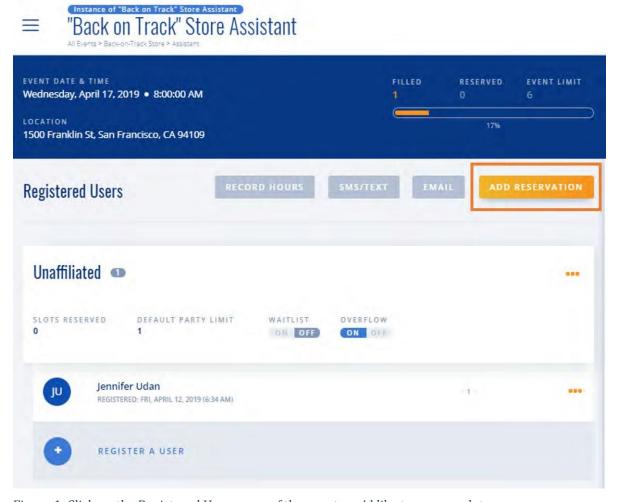


Figure 1. Click on the Registered Users page of the event you'd like to reserve slots on.

Step 3.

You should now see the Add Reservation popup (Figure 2). Begin typing the name of the User Group into the field and select the matching group.



Figure 2. Select a user group, then click the Register User Group button.

Step 4.

Click the **Register User Group** button (Figure 2 above).

Step 5.

Enter the number of slots you want to reserve in the **Slots Reserved** field (Figure 3).

This is the number of slots you want to guarantee that ONLY members of the selected user group are able to register for. Members who do not belong to the selected user group will not be able to sign up for these slots. For instance, if your event has a total Event Slot Limit of 20 and you reserve 12 slots for Wells Fargo, 8 slots will still be open to the general public (via Unaffiliated Users).

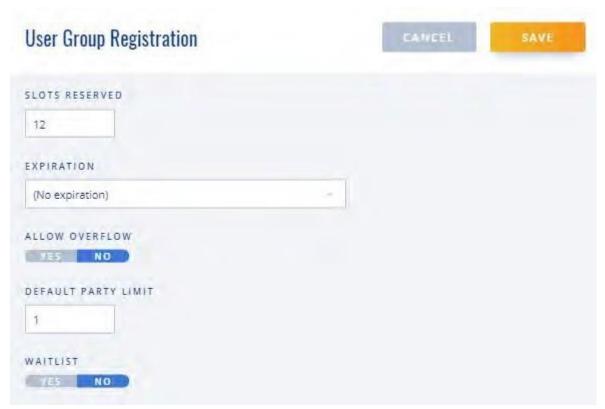


Figure 3. Enter the number of slots that will be taken by members of your group in the Slots Reserved field.

Step 6.

Click **SAVE** button to save your changes.

Setting an event up to use the Kiosk Mode

- > Sign in as Administrator and go to the **Hamburger** icon on the dashboard and select **Events**.
 - o Setup event as per usual. Include Name of Event, Group, Date/Time, etc.
 - SAVE the event.

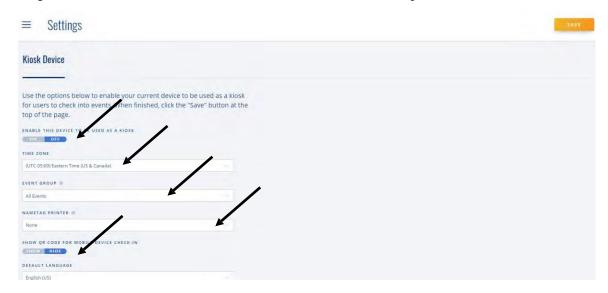
NOTE: The contact person named in this event will be the only person that can setup the Kiosk. SM/SEC Admins do have the ability to override the contact and set it to any person, but for the Kiosk to be setup, that person must be an Admin.

Setting up the Kiosk

- > Select the device, PC or Tablet, that will be used as a Kiosk, at the event.
 - o Sign into the device, go to **Hamburger** icon on the dashboard and select **Kiosk**.
 - O Click the **Activate** box that appears on the bottom right corner of the page.

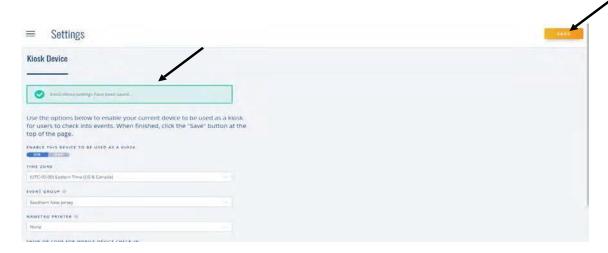


o Sign into ARES Connect as an Administrator with username and password.



- Select ON for Enable this Device to Be Used as a Kiosk
- o Set **Time Zone** for your event (location with drop-down).
- Select the **Event Group** with drop-down.

- o Select Nametag Printer, if planning on printing name tags. Otherwise, it defaults to None.
- Select Show QR Code for Mobile Devine Check-in, allowing those with QR readers on their smartphones to check into the event quickly and easily.
- O Click the **SAVE** button on the top-right corner of the page.



Note ~ "Settings have been saved" will appear on the top-left corner of the page. Kiosk and Event have been setup.

Event Kiosk Use

- > Sign into ARES Connect then click on the **Hamburger** to select **Kiosk**.
- > Volunteers who are already registered for an event can simply activate their QR Code reader app on their phone and check-in to the event.
- > If a volunteer has not registered for an event or does not have a QR Code reader app on their phone, they can simply select **I Already Have an Account**, then **Find My Account**, and type in their call sign. Click the blue **Continue** button to proceed.



Note ~ The system will pull up your name and ask you **Is this you?** If it is, then click the blue **Continue** button once again. It will now list events and ask which event you are participating in today.

Click the event that you are participating in, then click the **Continue** button. The message will now appear that **You are now checked in**. Click the **Exit** button to finish. Whichever way you check in, once you have been accepted at the Kiosk, your time is automatically recorded, and no further action is required.

You can also use this Kiosk to sign up new volunteers. You simply select **I Don't Have an Account** to **Create an Account**, and the volunteer goes through the process of answering all the questions. Once completed, the volunteer is now registered as a **New Volunteer** and will be waiting to be properly vetted into the system.

Events Monitor User Group

Please read the following carefully before initiating your Section's "Events Monitor" User Group.

The "Events Monitor" User Group was designed to give volunteers the ability to go "back-in-time" on the calendar and register for and/or add time to any past event. In order to create this feature, it was necessary to modify an already existing Admin group.

In doing so, certain features of the existing Admin group could not be filtered down to allow changes solely for a single individual. As such, this *does* allow the volunteer some extra abilities that you may not feel are appropriate for your volunteers to use. The Events Monitor group is selectable (on/off) for each volunteer, and it is up to the SEC/SM Admins to either select or not select this option for their volunteers.

Events Monitor allows a volunteer to:

- View any user in their Section.
- View any Event (past, present, or future) within their Section.
- Add or subtract volunteers, add time or change time to any volunteer, add a User Group as a reservation to an Event, and utilize the "Approve Hours" portion of the Dashboard.
- Utilize the Kiosk mode on their cell phone, computer or tablet. They would have to be the contact person for that event in order for this mode to be utilized.

Giving a volunteer the ability to add other volunteers, and their time, to an event is not always a bad thing. There are times when the Admin will set up an event but not be able to attend. If there is a person assigned to the "signup" sheet, said person would have the ability, in lieu of the Admin, to add people who attended the event, as well as add their time without needing to relay this information to the Admin.

Nets are another good example. A Net Controller is not always the Event Admin. The Net Controller has the list of names of those who checked in and knows how much time was recorded for the net. Giving this person the ability to directly add people and time to the event saves the Admin time and allows for more accurate and timely reporting.

Volunteers would also have the ability to set up and utilize the "Kiosk" mode, making checking into an event virtually automatic for the volunteers.

Events Monitor does *not* allow a volunteer to:

- Edit User Groups.
- Create, modify, or delete Events.
- Run reports, save for their own account.
- Add new volunteers or modify any existing volunteers' profile account, including their own.

In general, most volunteers will leave these additional features alone, especially if explained that adding anyone other than themselves, or changing anyone else's time for any events is prohibited. Tampering with another person's account, unless authorized, is never acceptable. Please be advised that any current Admins, ECs and above, already have the rights to alter events and/or time/hours, as well as create users at will. You, as the SEC/SM Admin, have the responsibility to your Section to properly audit the system by regularly monitoring the entry of volunteers, events, and time being recorded.

The SEC/SM Admins can "undo" any action that a volunteer or Admin might do if they choose to tamper with the system, as well as disqualify anyone who intentionally alters accounts other than their own.

Events Monitor (Section Administrators must approve use)

The **Events Monitor** feature in ARES Connect is a specifically designed **User Group** that, when assigned, gives Users the ability to go back in time to past events and register themselves and/or record hours for that Event. This feature must be set up by a Section Administrator, SM or SEC.

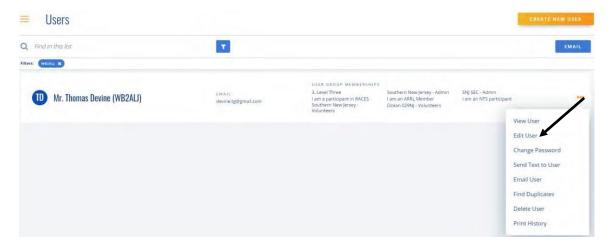
Careful consideration should be observed in granting this feature to users as there is no permission available that lets a user register themselves for past events otherwise. The only thing we can do is allow users access to past events in general. This was the only way we could give users the ability to add themselves to past events but allow some administrative access. This access is not solely limited to the user's specific events, they also have access to all members of their Events Monitor group. We are unable to limit them to one specific event. They will have access to edit all events in their Section's group. This administrative access, while limited, can still be misused and any such misuse will result in the user losing access to ARES Connect.

Administrative Setup of Events Monitor – Only for Section level Administrators

Note ~ Events Monitor can only be setup by a Section level Administrator, Section Manager or Section Emergency Coordinator. Sign in as Admin, open the Dashboard, and select Users in Hamburger icon.



Click the gold dots to the right of the **User's name** to open the user's account.



Click Edit User and scroll to Select User Group. Type Events in the text box.

■ Mr. Thomas Devine (WB2ALI)

SNy SCERN
Sun Murch 14.500 PM-9 PM ISO PRINGEN

SNy SCERN
Sun Murch 14.500 PM-9 PM ISO PRINGEN

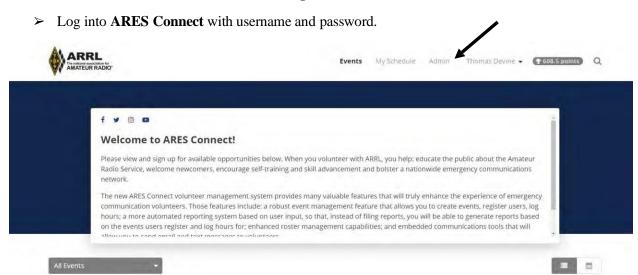
SNy SCERN
Son Murch 14.500 PM-9 PM ISO PRINGEN

SNy SCERN
Son Murch 14.500 PM-9 PM ISO PRINGEN

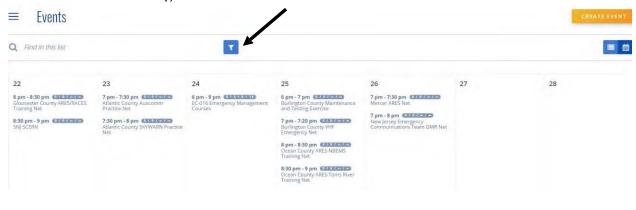
SSUN SCERN
Southern New Jersey Events Monitor

- O Click on **Section Events Monitor** when it appears, adding it to the user's account.
- Click **SAVE** on the upper-right corner. The **Events Monitor** is now an available feature for this User. Repeat process for each additional user. This is easiest to accomplish when first setting up a user.

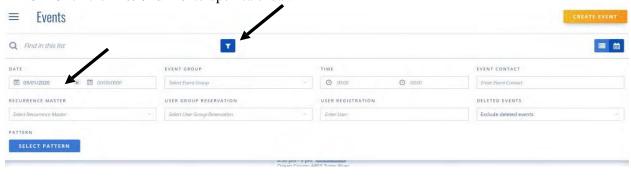
USERS Access to Events Monitor for Recording Prior Event



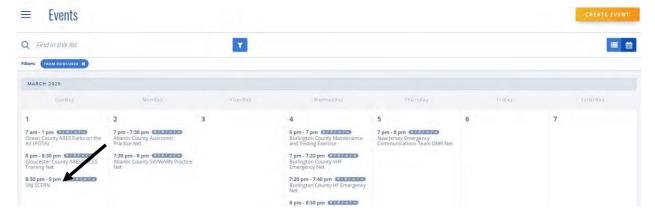
- Click **Admin.** If the **Admin** tab is not next to your name, Events Monitor has not been set up. Setup can only be accomplished by a Section Level ARES Connect Administrator.
- Click the Hamburger icon and select Events.



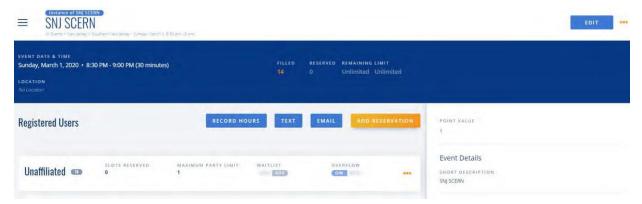
O Click the **Filter/Funnel** to open calendar.



Click the Filter/Funnel to view calendar at desired date.



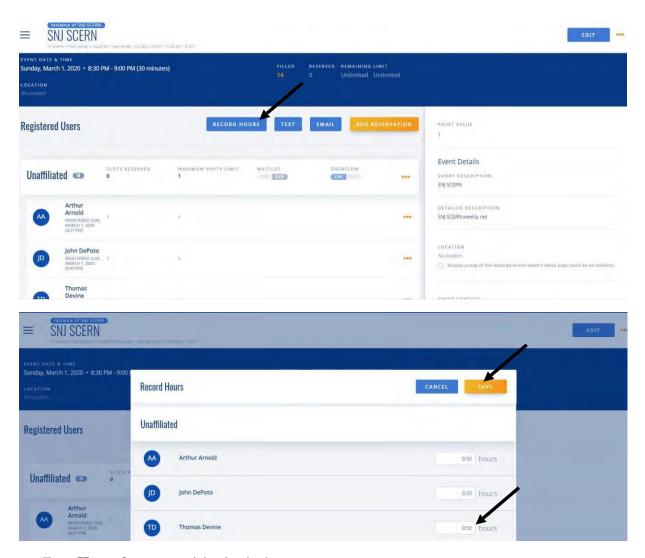
O Select the **Event Name** to open the event.



o Click + Register A User; enter a call sign,



- O Click Name/Call or press Enter on keyboard to enter name in Existing User box.
- o Click **Register User** to add user to the event on a prior date.
- o Scroll to the top of the window and click **Record Hours.**



- o Enter **Hours** for your participation in the event.
- o Press SAVE

Uploading Volunteer Documents into ARES Connect

It is now possible to include all of your important volunteers' files (documents) into ARES Connect. We now have a way of linking to those important documents for our ARES Connect Volunteers. This is accomplished by the use of an external storage device or program (ie.. Google Docs, Dropbox, website...). Anywhere where a link (URL - web address) can be generated for those documents will work. Yes, it does need to have a "link" (URL) in order for this to work.

On all volunteer accounts there is a text box labeled "General Notes." It is located near the bottom of the volunteer's profile (just above the "Record Mileage" text box. It was originally designed for the admins to write notes about the volunteer in. It now can also include links (web addresses - URL). This gives us some extra flexibility in being able to make notes as well as add those links to where that particular volunteer's documents are stored, giving the Admins full control on what information, how that information is listed, and just where that information is actually stored for each volunteer.

Which Storage Devices or Programs Do I Use.

Which device or program you use is entirely up to you. The ARRL makes no recommendations, nor can they give any help or instructions on how to setup or maintain the storage device or program. This is your responsibility. It is recommended that you follow all specific directions for setup, security and operation of that particular device or program.

Inputting the link (URL) into ARES Connect

In ARES Connect you will need to have Admin rights to complete this portion of the directions.



In the Admin section of ARES Connect click on the Menu (hamburger) bar.



Click on the "User" icon

Type in the "Find In This List" search area on the upper left corner the call sign of the volunteer you want to and then press enter.

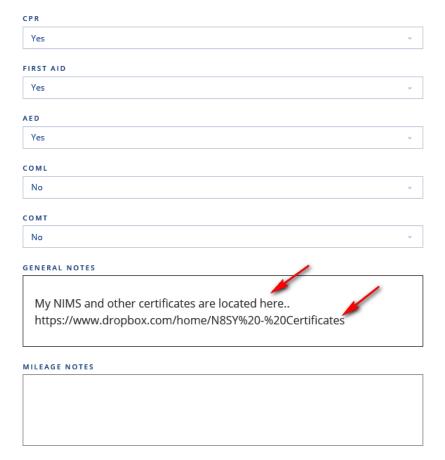




Click on the name of the volunteer when it appears on the screen. This will open up the volunteer's account.

Then click on the blue "Edit" bar in the upper right-hand corner of the screen. You are now able to edit the volunteers account.





Scroll down to the next to the last text box, it's labeled "General Notes." This is where you will add any description of the documents that are stored. Be sure to leave some space between your text and the link (URL) so that the link is clearly defined. Then either type in, or paste in, the link (URL) where the documents are stored.

Once done and you are satisfied that the information you've entered is correct, simply hit the yellow "Save" button on the upper right-hand corner of your screen.

That's it.



Disclaimer

As that you are using data storage that is outside of the ARRL's control, the ARRL or any of its agents assumes no responsibility for the setting up, maintaining of, or any loss, damage or stolen information that may occur using any external storage device or program. The users of these storage devices or programs assumes full responsibility for the accuracy, storage, and/or loss of information that may occur.

It is strongly advised that the users of these external devices or programs utilize all security measures and backups that the storage device or program has to offer.

Appendix A

Section	Link	Short Link
<u>Alabama</u>	http://al.arrl.volunteerhub.com/	http://vhub.at/aresconnect-al
Alaska	http://ak.arrl.volunteerhub.com/	http://vhub.at/aresconnect-ak
<u>Arizona</u>	http://az.arrl.volunteerhub.com/	http://vhub.at/aresconnect-az
<u>Arkansas</u>	http://ar.arrl.volunteerhub.com/	http://vhub.at/aresconnect-ar
ARRL HQ	http://arrlhq.arrl.volunteerhub.com/	http://vhub.at/arrlhq
<u>Colorado</u>	http://co.arrl.volunteerhub.com/	http://vhub.at/aresconnect-co
Connecticut	http://ct.arrl.volunteerhub.com/	http://vhub.at/aresconnect-ct
<u>Delaware</u>	http://de.arrl.volunteerhub.com/	http://vhub.at/areconnect-de
East Bay	http://eb.arrl.volunteerhub.com/	http://vhub.at/aresconnect-eb
Eastern Massachusetts	http://ema.arrl.volunteerhub.com/	http://vhub.at/aresconnect-ema
Eastern New York	http://eny.arrl.volunteerhub.com/	http://vhub.at/aresconnect-eny
Eastern Pennsylvania	http://epa.arrl.volunteerhub.com/	http://vhub.at/aresconnect-epa
Eastern Washington	http://ewa.arrl.volunteerhub.com/	http://vhub.at/aresconnect-ewa
Georgia	http://ga.arrl.volunteerhub.com/	http://vhub.at/aresconnect-ga
<u>Idaho</u>	http://id.arrl.volunteerhub.com/	http://vhub.at/aresconnect-id
Illinois	http://il.arrl.volunteerhub.com/	http://vhub.at/aresconnect-il
<u>Indiana</u>	http://in.arrl.volunteerhub.com/	http://vhub.at/aresconnect-in
lowa	http://ia.arrl.volunteerhub.com/	http://vhub.at/aresconnect-ia
Kansas	http://ks.arrl.volunteerhub.com/	http://vhub.at/aresconnect-ks
<u>Kentucky</u>	http://ky.arrl.volunteerhub.com/	http://vhub.at/aresconnect-ky
Los Angeles	http://lax.arrl.volunteerhub.com/	http://vhub.at/aresconnect-lax
Louisiana	http://la.arrl.volunteerhub.com/	http://vhub.at/aresconnect-la
Maine	http://me.arrl.volunteerhub.com/	http://vhub.at/aresconnect-me
Maryland - DC	http://mdc.arrl.volunteerhub.com/	http://vhub.at/aresconnect-mdc
Michigan	http://mi.arrl.volunteerhub.com/	http://vhub.at/aresconnect-mi
Minnesota	http://mn.arrl.volunteerhub.com/	http://vhub.at/aresconnect-mn
Mississippi	http://ms.arrl.volunteerhub.com/	http://vhub.at/aresconnect-ms
Missouri	http://mo.arrl.volunteerhub.com/	http://vhub.at/aresconnect-mo
<u>Montana</u>	http://mt.arrl.volunteerhub.com/	http://vhub.at/aresconnect-mt
Nebraska	http://ne.arrl.volunteerhub.com/	http://vhub.at/aresconnect-ne
<u>Nevada</u>	http://nv.arrl.volunteerhub.com/	http://vhub.at/aresconnect-nv
New Hampshire	http://nh.arrl.volunteerhub.com/	http://vhub.at/aresconnect-nh
New Mexico	http://nm.arrl.volunteerhub.com/	http://vhub.at/aresconnect-nm
North Carolina	http://nc.arrl.volunteerhub.com/	http://vhub.at/aresconnect-nc
North Dakota	http://nd.arrl.volunteerhub.com/	http://vhub.at/aresconnect-nd
North Texas	http://ntx.arrl.volunteerhub.com/	http://vhub.at/aresconnect-ntx
Northern Florida	http://nfl.arrl.volunteerhub.com/	http://vhub.at/aresconnect-nfl
Northern New Jersey	http://nnj.arrl.volunteerhub.com/	http://vhub.at/aresconnect-nnj
Northern New York	http://nny.arrl.volunteerhub.com/	http://vhub.at/aresconnect-nny

NYC - Long Island Ohio Oklahoma Orange Oregon **Pacific** Puerto Rico Rhode Island Sacramento Valley San Diego San Francisco San Joaquin Valley Santa Barbara Santa Clara Valley South Carolina South Dakota **South Texas** Southern Florida Southern New Jersey Tennessee Utah **Vermont** Virgin Islands Virginia West Central Florida West Texas West Virginia Western Massachusetts Western New York Western Pennsylvania Western Washington Wisconsin Wyoming

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http://vhub.at/aresconnect-nli http://vhub.at/aresconnect-oh http://vhub.at/aresconnect-ok http://vhub.at/aresconnect-org http://vhub.at/aresconnect-or http://vhub.at/aresconnect-pac http://vhub.at/aresconnect-pr http://vhub.at/aresconnect-ri http://vhub.at/aresconnect-sv http://vhub.at/aresconnect-sdg http://vhub.at/aresconnect-sf http://vhub.at/aresconnect-sjv http://vhub.at/aresconnect-sb http://vhub.at/aresconnect-scv http://vhub.at/aresconnect-sc http://vhub.at/aresconnect-sd http://vhub.at/aresconnect-stx http://vhub.at/aresconnect-sfl http://vhub.at/aresconnect-snj http://vhub.at/aresconnect-tn http://vhub.at/aresconnect-ut http://vhub.at/aresconnect-vt http://vhub.at/aresconnect-vi http://vhub.at/aresconnect-va http://vhub.at/aresconnect-wcf http://vhub.at/aresconnect-wtx http://vhub.at/aresconnect-wv http://vhub.at/aresconnect-wma http://vhub.at/aresconnect-wny http://vhub.at/aresconnect-wpa http://vhub.at/aresconnect-wwa http://vhub.at/aresconnect-wi http://vhub.at/aresconnect-wy