

## Inperson module


Last Modified on 07/31/2024 10:34 am IDT

 This article is designated for administrators.

### About

The **Inperson module** facilitates the setup and customization of the in-person check-in process for hybrid events. It manages both in-person and hybrid registration, providing options to configure relevant fields and customize the check-in flows and experience according to your event needs. With the convenience of using QR codes, attendees can check in independently or with the assistance of a 'gatekeeper', making the process smooth and efficient.

To learn about the attendee check-in process, check out our article [In-person Attendance](#).

 Applies exclusively to the Video Portal.

### Prerequisite


To get started, make sure to enable both the [Theming module](#) and [Basesiteregistration module](#).

### Configure

1. Go to your Video Portal Configuration Management console, and navigate to the **Inperson** module. Your link should look like this:

`https://{your_KMS_URL}/admin/config/tab/Inperson.`

#### ModulesCustom / core

Certificates
Emaillogin
Eventplatformmanager
Foryoupage
<b>Inperson</b> 
Iprestriction
Kwebcast

The Inperson module page displays.

## Inperson

Module Info	
Description	The InPerson module handles the in-person and hybrid registration. Using this module you can configure the relevant fields of the in-person/hybrid registration and customize the check-in flows and experience.
Note	KMS only Module. Depends on the <a href="#">BasesiteRegistration</a> module.
Check-in pages	To navigate to the check-in page where you can check users in, click on the button below. <a href="#">Check-in Page</a>

enabled  Enable the Inperson module.

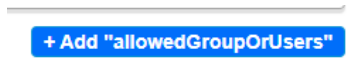
**Check-in pages** - After configuring the module, you can click **Check-in page** to preview the gatekeeper's view and / or begin checking in users, or you can navigate directly to the check-in page using this link: {your\_base\_site\_URL}/inperson.

2. **enabled** - Set to 'Yes' to enable the module

## Assign gatekeepers

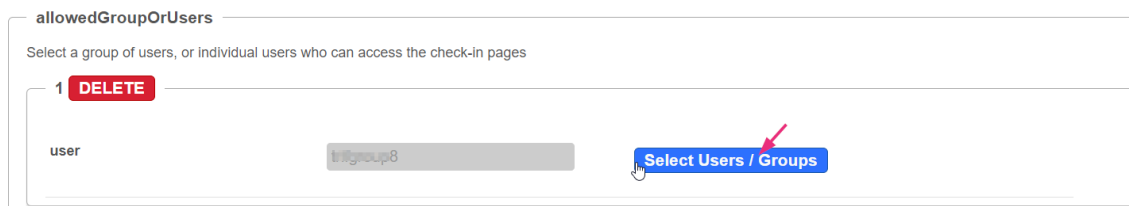
In the **allowedGroupOrUsers** section, select a group of users or individuals (gatekeepers) who will be permitted to access the check-in pages on their devices. Only these users can access the pages; others will get 'access denied'.

1. Click **+Add "allowedGroupOrUsers"**.

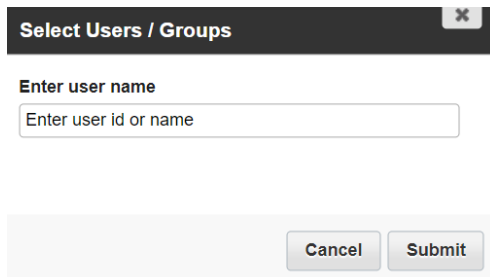


A new section displays.

2. Click **Select Users / Groups**.



3. Enter the name or ID in the box that opens.



✓ The users' IDs are sourced from the Manage Users section of the administration configuration page.

4. Click **Submit**.

## Set user check-in type

💡 QR codes are created per user, per event.

### **CheckInUsersType**

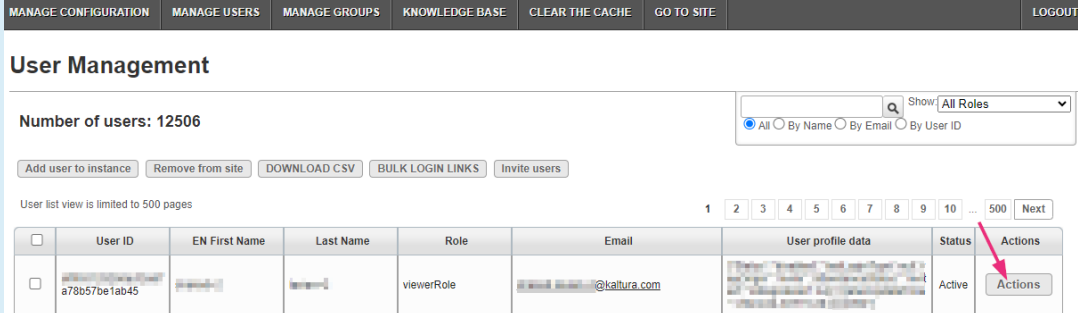
(For information on user types, see the section below [Where do the user types come from?](#))

Select from the drop-down menu which types of users can check in :

- **All registered users** - all registrants can check-in, excluding deleted / blocked users
- **In-person registrants only** - only users who registered and selected 'in-person event' during registration can check-in
- **Access granted only\*** - only users who registered and were granted access from the Manage Users page or via integrations (usually used for paid events) can check in

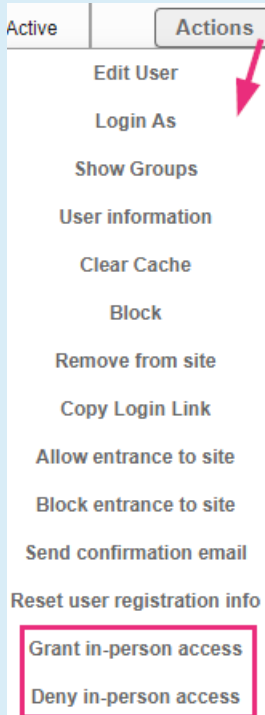
\*Users in the '**Access granted only**' category are assigned in the Manage Users section of the administration configuration page, as follows.

1. Locate the user and click on the **Actions** menu at the far right.



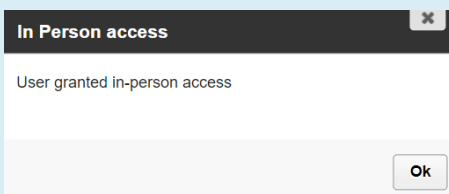
The screenshot shows the 'User Management' section of the administration page. At the top, there are navigation tabs: MANAGE CONFIGURATION, MANAGE USERS, MANAGE GROUPS, KNOWLEDGE BASE, CLEAR THE CACHE, GO TO SITE, and LOGOUT. Below the tabs, the 'User Management' header is displayed. A search bar is present with a dropdown menu set to 'All Roles'. The number of users is shown as 12506. There are buttons for 'Add user to instance', 'Remove from site', 'DOWNLOAD CSV', 'BULK LOGIN LINKS', and 'Invite users'. A pagination bar shows 'User list view is limited to 500 pages' and a range of page numbers from 1 to 10, with '500' and 'Next' also visible. A table of users is shown with columns: User ID, EN First Name, Last Name, Role, Email, User profile data, Status, and Actions. The first user listed has the ID 'a78b57be1ab45', role 'viewerRole', and email '@kaltura.com'. The 'Status' column shows 'Active' and the 'Actions' column has an 'Actions' button. A red arrow points to this button.

2. Select either **Grant in-person access** or **Deny in-person access**.



The screenshot shows the 'Actions' dropdown menu for a user. The menu is open, showing various options. A red arrow points to the 'Actions' button in the previous screenshot. The options in the dropdown menu are: Edit User, Login As, Show Groups, User information, Clear Cache, Block, Remove from site, Copy Login Link, Allow entrance to site, Block entrance to site, Send confirmation email, Reset user registration info, Grant in-person access, and Deny in-person access. The last two options, 'Grant in-person access' and 'Deny in-person access', are highlighted with a red rectangular box.

3. A confirmation displays.

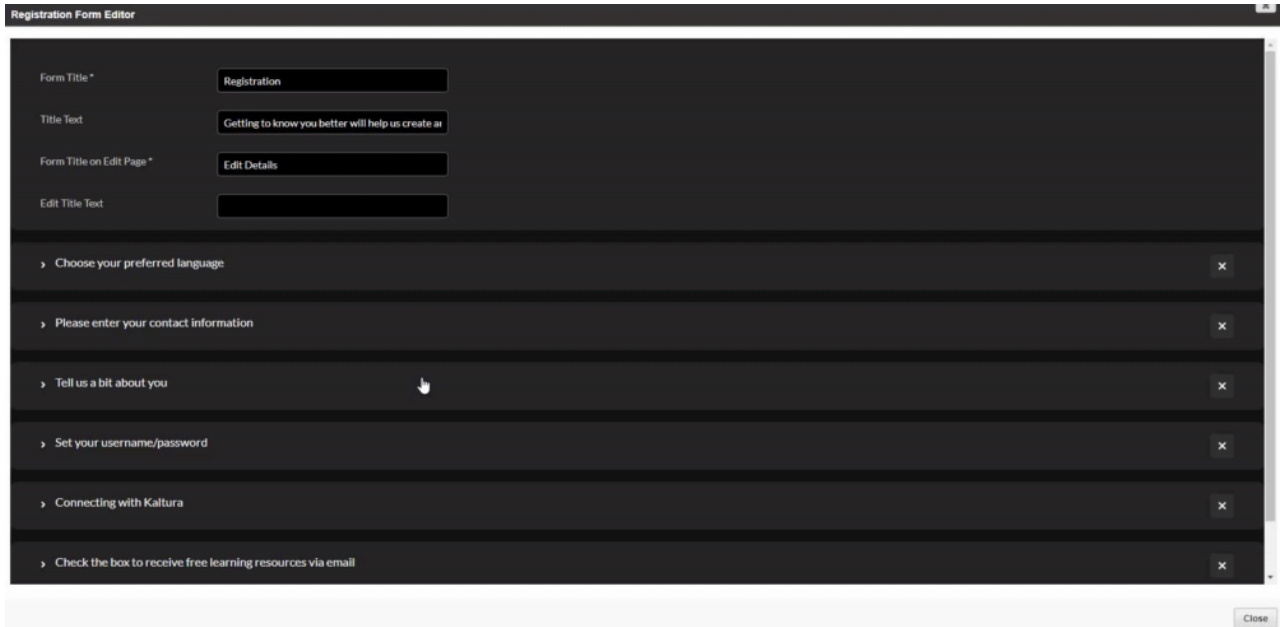


The screenshot shows a confirmation dialog box titled 'In Person access'. The dialog box has a close button (X) in the top right corner. The main text inside the dialog box reads 'User granted in-person access'. At the bottom right of the dialog box, there is an 'OK' button.

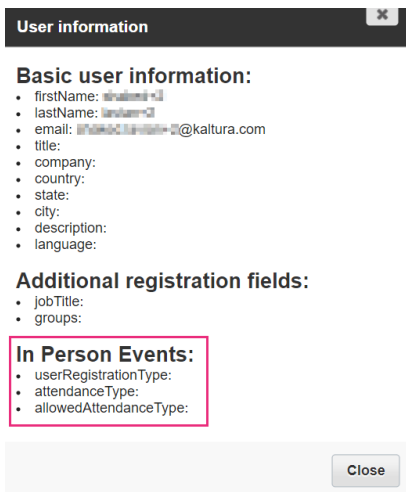
4. Click **OK**.

## Where do the user types come from?

In the registration form, users indicate their attendance preference (in-person, online, or both) via a designated field. This aligns with the 'checkinuserstype' selected in the module settings. To configure this field, access the [Registration Form Editor](#) through the [Basesiteregistration module](#), and choose 'Attendance Type' from the drop-down menu.




Administrators can see and update user's attendance information in the Manage Users section of the administration configuration page under **User Information**. If a user attends one event in person and another event online, their information will be updated accordingly under **In Person Events**. This ensures accurate user details are maintained for each event attended, regardless of whether it's in person, online or both.



## Customize check-in page

**logo** - Upload a logo which will appear at the top of the Welcome page. Leave empty to use the logo of the event site.

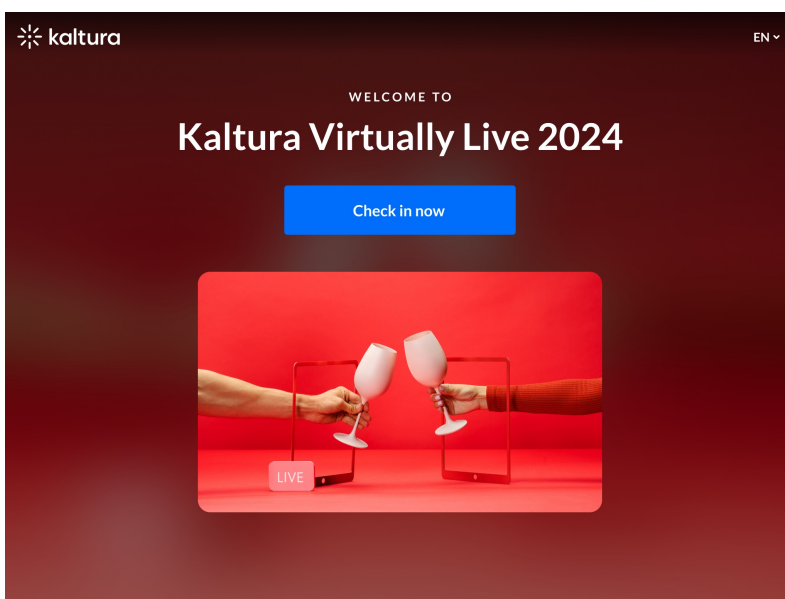
 Every page in the check-in flow will have the same logo.

**titlePrefix** - Enter a title prefix (plain text) for the top of the Welcome page. Default is 'Welcome to'.

**title** - Enter a title (plain text) for the top of the Welcome page. Leave empty to use the site title.

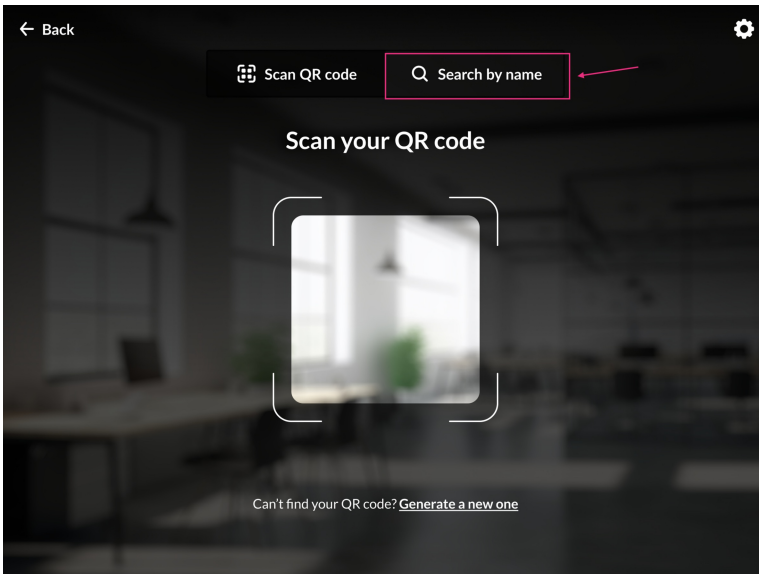
**bannerImage** - Upload a banner image to be displayed on the center of the page. Recommended size is 1920 x 1080. Leave empty to use the default.

Example of Welcome page:

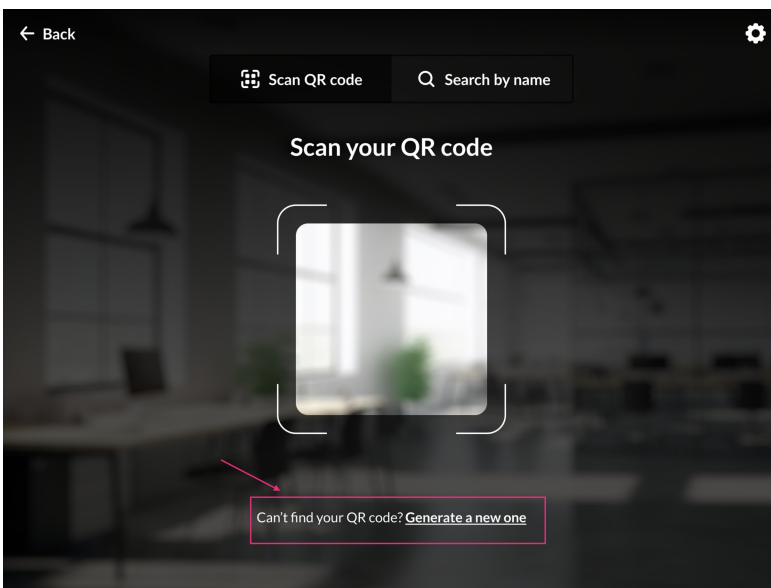


**displayUserSearch** - Choose **Display** or **Hide** to give attendees the extra option of checking in by name in addition to checking in by QR code.

- **Hide** - only the 'Scan QR code' option will display on the screen
- **Display** - a 'Search by name' option will also display on screen, as shown in the image below:



**enableGenerateQR** - Set to 'Yes' to allow attendees to generate a new QR code during the check-in process, if necessary. You can also choose an email template for this purpose. See [GenerateQREmailTemplate](#) below. This option will display text below the QR scanner, as shown in the image below:



**allowEditDetails** - Set to 'Yes' to allow attendees to edit their personal details during the check-in process.



You have the option to send customized emails to in-person event attendees, separate from those sent to online attendees.

## Choose email templates

You can choose an email template, which includes the QR code, to send to attendees.

⚠ Please note that in order to include a QR code in your emails, you need to add the token **{QRCODE}** to the body of the template, for example: *Here is your*{QRCODE}. This will output: *Here is your*+ the generated QR code.

✓ When choosing an email template, we recommend sending the QR code to the user after they confirm their email address, rather than immediately after they complete registration.

Choose one or more from the following options:

**GenerateQREmailTemplate** - Choose an email template to send the attendees who request a new QR code during the check in process. To configure email templates, click [Configure email templates](#). Visit our article [emailTemplates](#) if you need help.

**PostCheckinEmailTemplate** - Choose an email template from the drop-down menu to send the in-person attendees after they completed check-in. To configure email templates, click [Configure email templates](#). Visit our article [emailTemplates](#) if you need help.

**inPersonPostRegistrationEmailTemplate** - Choose an email template to send the attendees who selected 'in-person attendance' or 'both in-person and online attendance' after they completed the registration. To configure email templates, click [Configure email templates](#). Visit our article [emailTemplates](#) if you need help.

**inPersonPostRegistrationIcal** - Choose an email template to send the attendees who selected 'in-person attendance' or 'both in-person and online attendance' after they completed the registration. To configure email templates, click [Configure email templates](#). Visit our article [emailTemplates](#) if you need help.

**inPersonPostConfirmationEmailTemplate** - Choose an email template to send the attendees who selected 'in-person attendance' or 'both in-person and online attendance' after they confirmed their email address. To configure email templates, click [Configure email templates](#). Visit our article [emailTemplates](#) if you need help.

**inPersonPostConfirmationIcal** - Choose an email template to send the attendees who selected 'in-person attendance' or 'both in-person and online attendance' after they confirmed their email address. To configure email templates, click [Configure email templates](#). Visit our article [emailTemplates](#) if you need help.

When you have finished configuring the module, click **Save**.

## How does it look?

After configuring the module, simply click the blue **Check-in page** button at the top of the module page to preview the 'gatekeeper's' view and / or to begin checking in users!



## Inperson

### Module Info

**Description** The InPerson module handles the in-person and hybrid registration. Using this module you can configure the relevant fields of the in-person/hybrid registration and customize the check-in flows and experience.

**Note** KMS only Module. Depends on the [Basesiteregistration](#) module.

**Check-in pages** To navigate to the check-in page where you can check users in, click on the button below.

[Check-in Page](#)