SAVANCE WORKPLACE

How to Edit Kiosk Question Profiles

Using the Savance Workplace Kiosk

Phone: 248-478-2555

Email: support@savanceworkplace.com

www.savanceworkplace.com

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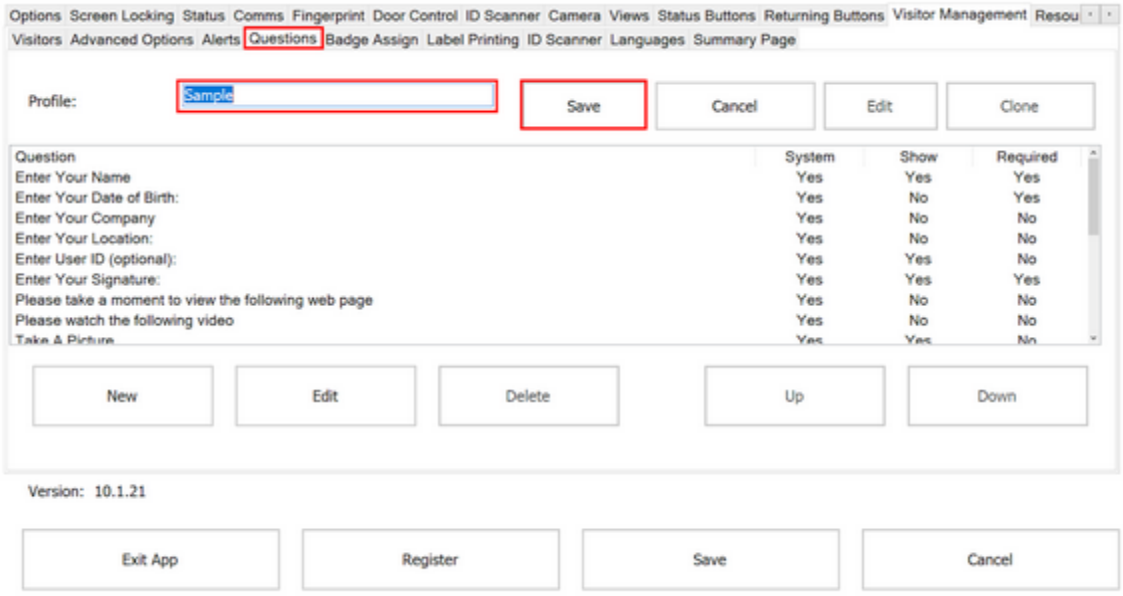
Overview

This guide will cover all the steps you need to complete in order to edit/change your current kiosk question profiles. This can be used for both staff check-in and visitor management kiosk types. You can edit the questions directly in the kiosk, or by using the software to access the question manager tool. As always, please reach out to your dedicated Savance support team representatives if you have any questions during this process.

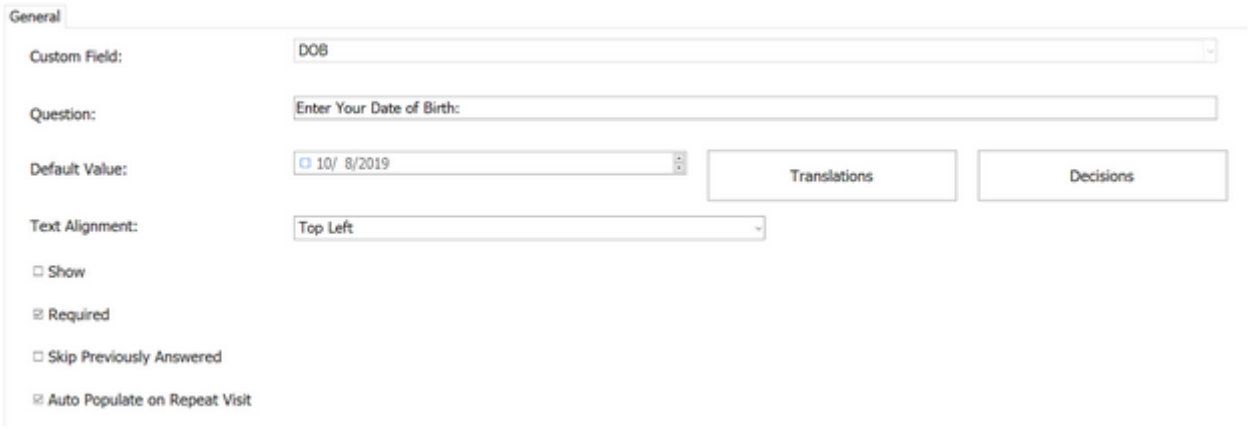
In the Kiosk

1. Enter the Kiosk Settings
2. Go to Visitor Management → Questions



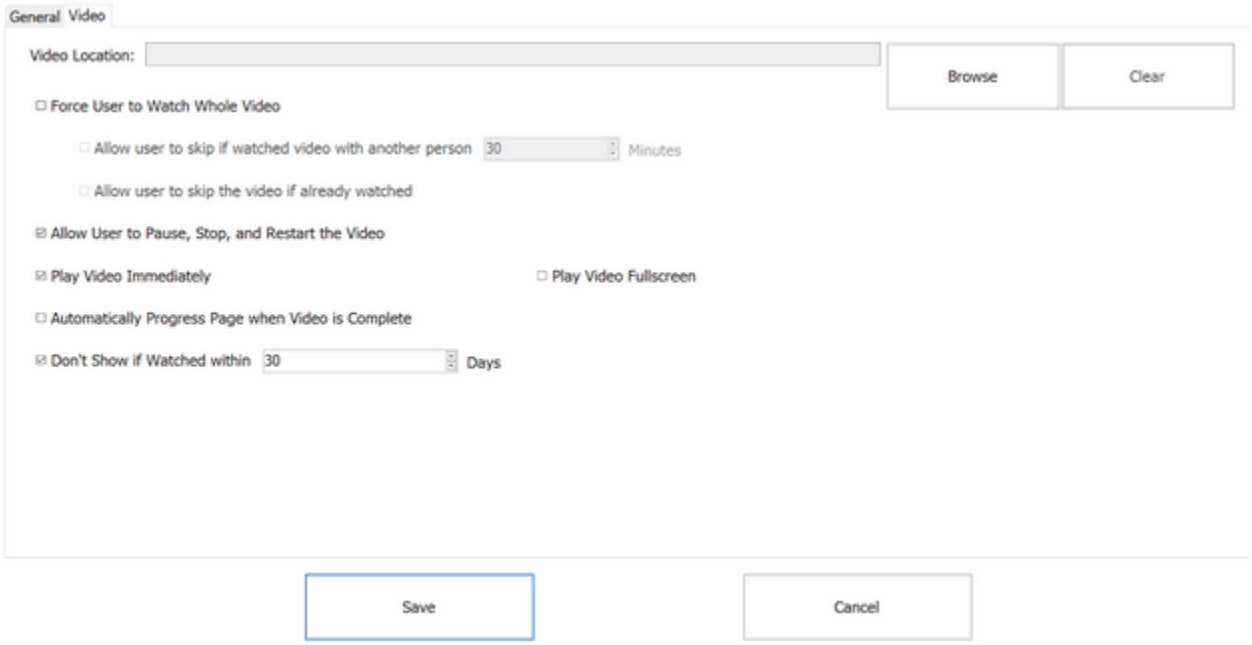
3. To allow a visitor to sign in, a question profile must be created so that at least a name can be taken from the visitor to identify them in the system. To create a question profile, go to the “Questions” tab and select “New” at the top right. Then name and save the question profile.

4. After creating a question profile, several default questions are available. The one question **"Enter Your Name"** is the only question which cannot be disabled as a name is required to identify users. Selecting **"Edit"** will allow for changes to specific questions. For most questions which require simple text input,the editor will allow selection of the field which is populated by their answer, the wording of the question, the default value, the text alignment, and choose whether it is shown, required, skipped if there is a known response, and auto populated with known response.

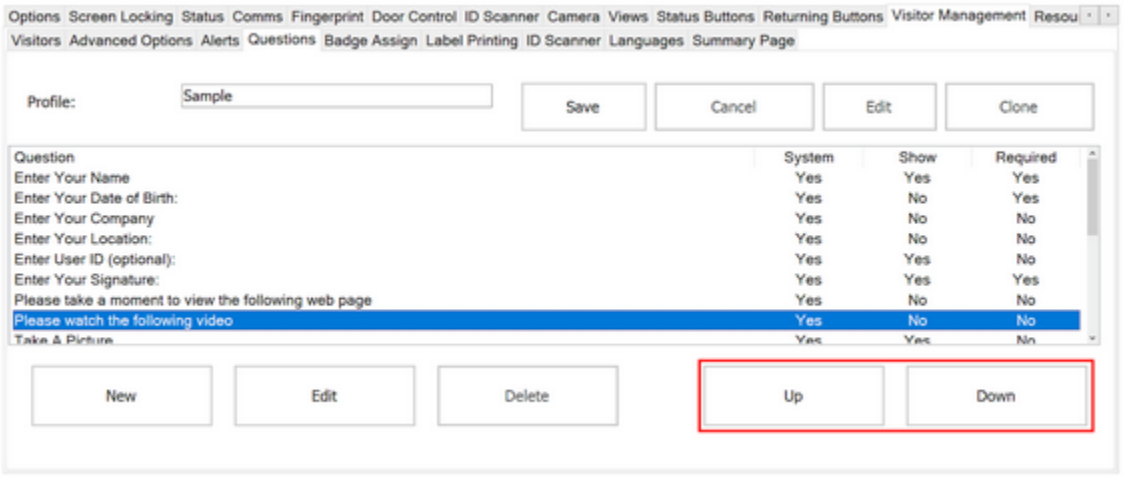


5. For some questions such as questions which ask the visitor to watch a quick safety video or read and sign an agreement, there is an additional field which will usually require a source and give some options that can be set if a visitor has already seen

the video. These will be in a second tab when editing the question.



6. Finally, to move the position of a question to be asked sooner or later, highlight the question with a click and then use the up and down buttons.



7. Additional Profiles
    - When setting up kiosks, separate question profiles can be created which ask distinct questions. This is especially useful if more than one kiosk will be used

at different locations for slightly different purposes. For example, if one kiosk is being used to check in contractors who must watch a safety video while another is signing in guests who are going on a tour and must sign a document, these profiles can be set up with the distinct questions to get the information needed by each distinct party.

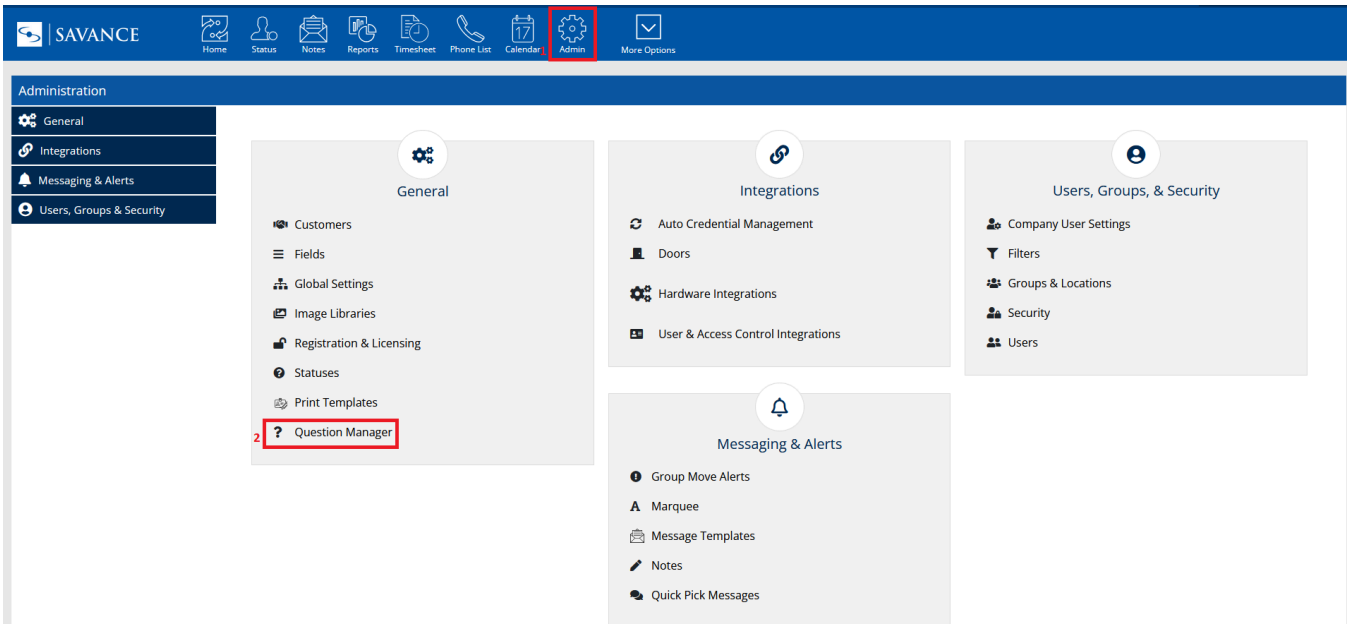
8. When finished, set the desired Question Profile for staff and Visitors

In the Question Manager

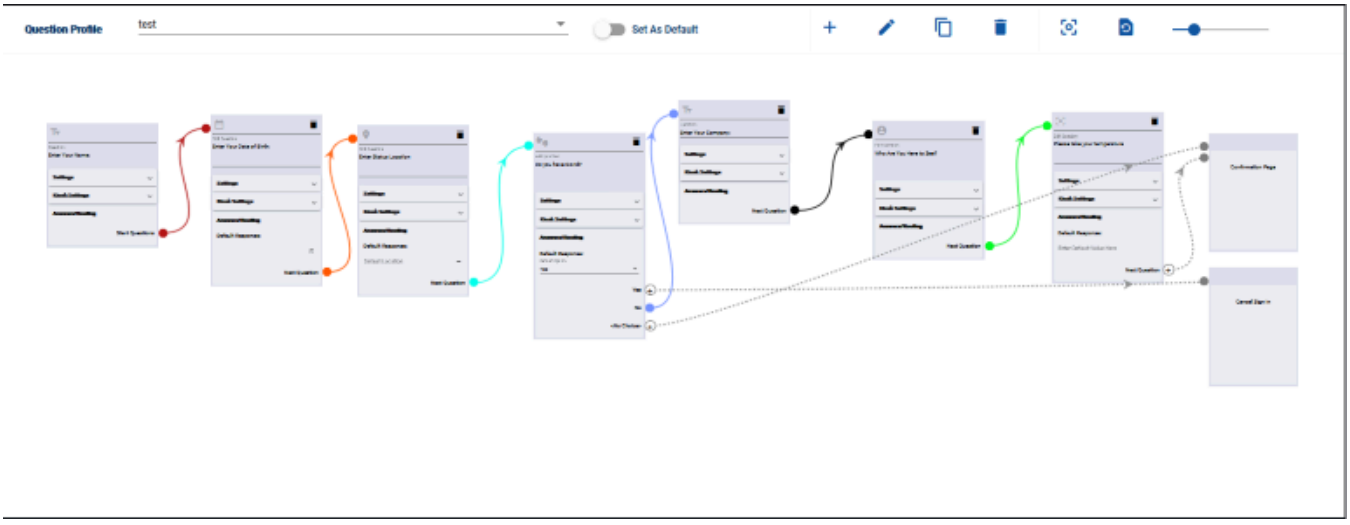
If your kiosk(s) is on version 10.3.0 or above (which you can either see in the Kiosk Settings or in the loading logo when opening the Kiosk), then you can also edit the Question Profile in the Web View. This allows for custom pathing and branching, as well as easier editing of the questions. This feature is not backward compatible with Kiosk versions prior to v10.3.0. Prior to editing any profile currently in use by a Kiosk, please upgrade the Kiosk to v10.3.0 or later.

Editing Questions

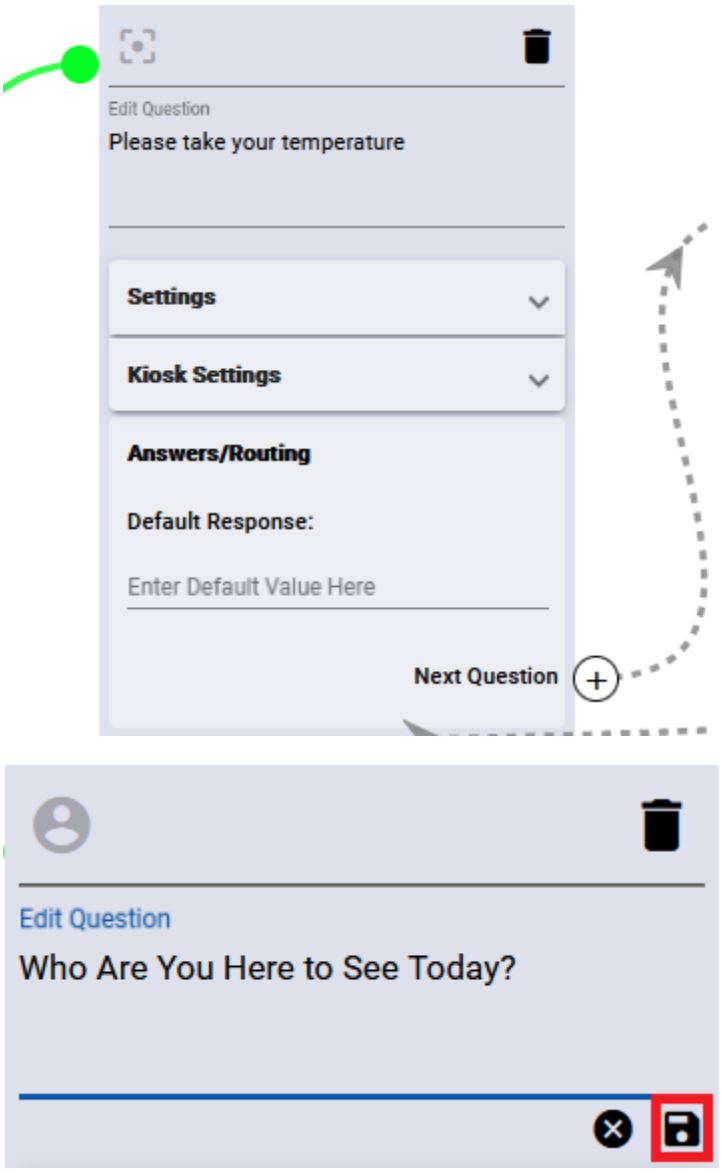
1. Go to https://cloud.savanceworkplace.com/Administration/QuestionManager.aspx (or [YourServerNameOrIP]/Administration/QuestionManager.aspx)
    - You can navigate here by logging into the Web with an admin account, then going to “Question Manager” under the general section of the Admin Page.



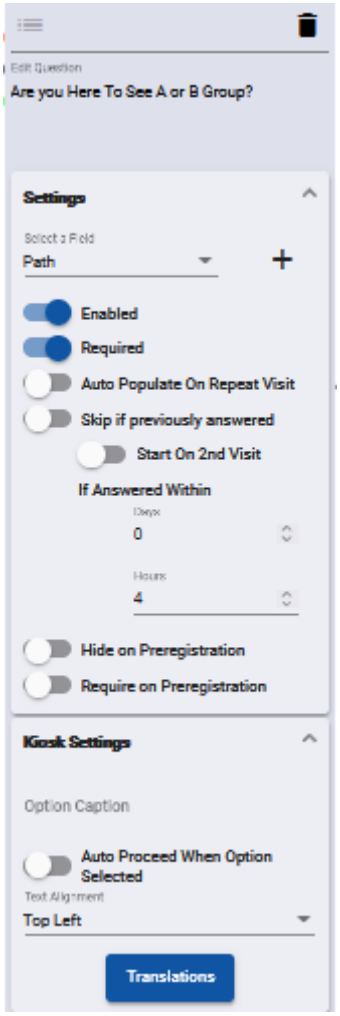
2. Here you can make and switch between editing Question profiles. You can zoom the Manager view without zooming in the browser by using the draggable bar at the top, or Shift+Scroll



3. You can edit a question by going to the box for it. You can change it's order in the profile by moving the connections to and from it, edit the text of the question itself



4. You can also edit the settings of the questions by expanding the two options, and choosing which Field the question fills out (for reporting and column headers)



Options when Editing a Question

- **Text:** You can edit the text of the question, then save after changes by clicking the Save Icon to the bottom right of text box.
- **Settings**

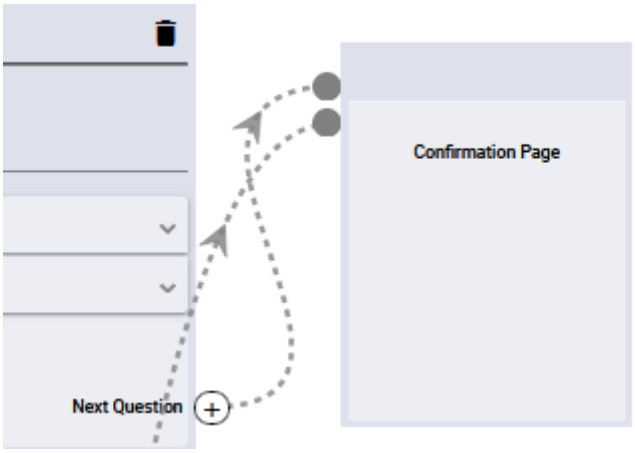
- **Field:** Here you can either select any **already created field** of the matching type to the question, or create a new custom field by pressing the + button
- **Enabled:** Whether the question shows up or not. Before disabling a question make sure no other questions are pathing to it.
- **Required:** Whether the question is required to be answered or they can complete the question profile without filling it out.
- **Auto Populate on Repeat Visit:** If a visitor or staff has already completed this question profile and this option is on, their previous answer will be saved so they can just correct it or hit next
- **Skip if previously answered:** If a visitor or staff has already completed this question profile and this option is on, this question will be completely skipped and it will go straight to the next question on their answers path
    - **Start on 2nd visit:** If this option is turned on, skipping if previously answered won't take effect on the first non-pre-registered visit of an user
- **Hide on Pre-registration:** If using a Pre Registration QR Code or link, this question won't be asked during it, so they have to answer it on their actual check-in.
- **Require on Pre-registration:** If using a Pre-registration QR Code or link, this question will be required in order to pre-register.

- **Kiosk Settings**
    - **Auto Proceed when option selected:** Whether the question auto-proceeds when a value is filled out for this question. Otherwise the User will have to click Next even after selecting their option

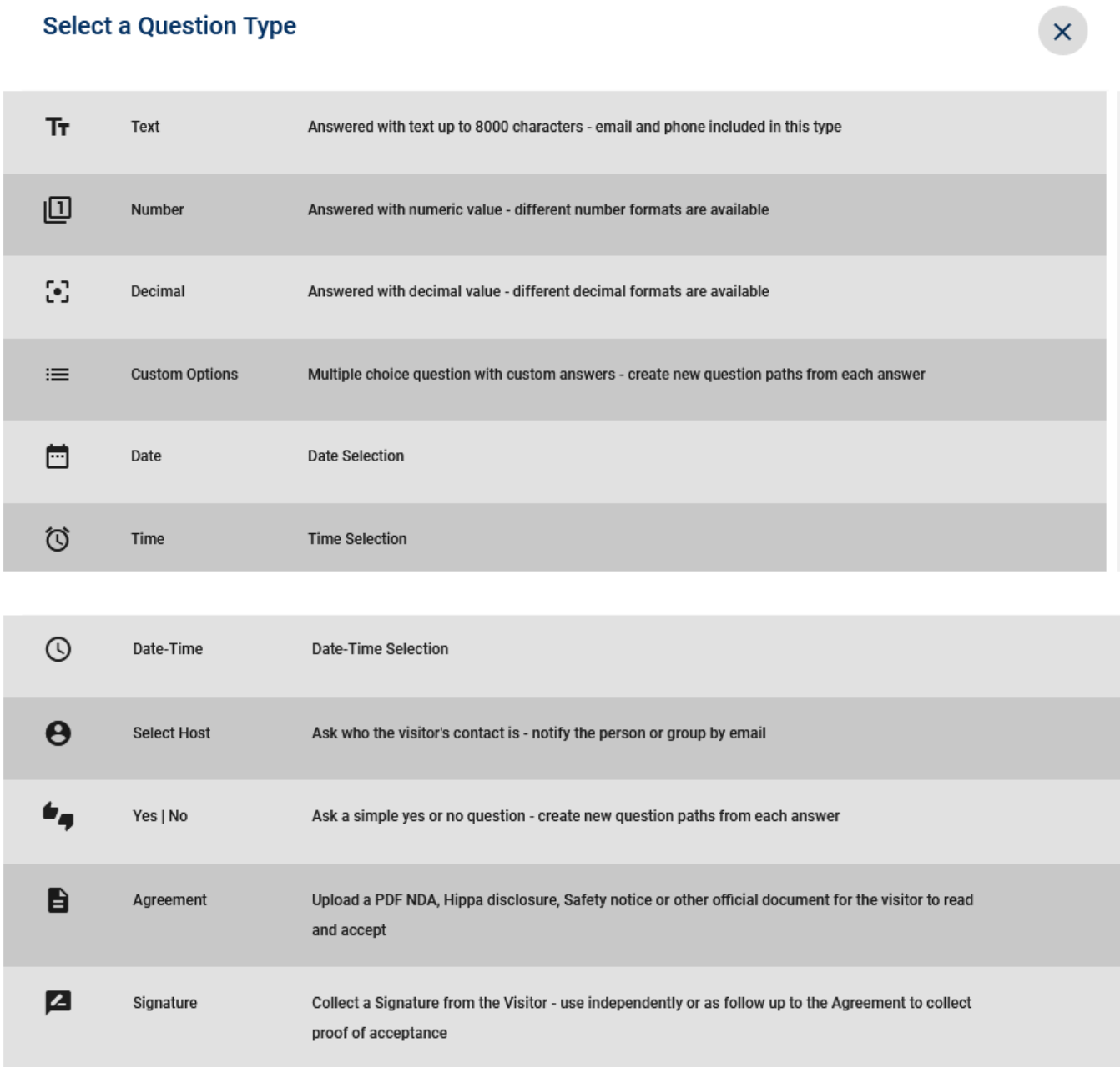
- **Text Alignment:** The Alignment for the text on the Kiosk. Useful if the Text is intersecting with a logo or design element on the page.
- **Translations:** If setting up multiple languages on your kiosk, here is where you can put in the alternate translations for the question

Adding New Questions

1. To make a new question, click the white + on any circle of a path leading to the confirmation page

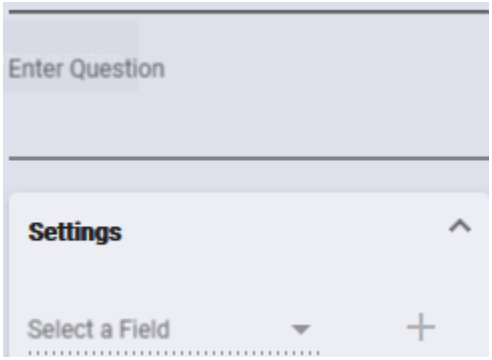


2. This will bring up the new question options, where you can choose what question type you want it to be.


Select a Question Type
Text
Answered with text up to 8000 characters - email and phone included in this type
Number
Answered with numeric value - different number formats are available
Decimal
Answered with decimal value - different decimal formats are available
Custom Options
Multiple choice question with custom answers - create new question paths from each answer
Date
Date Selection
Time
Time Selection
Date-Time
Date-Time Selection
Select Host
Ask who the visitor's contact is - notify the person or group by email
Yes | No
Ask a simple yes or no question - create new question paths from each answer
Agreement
Upload a PDF NDA, Hippa disclosure, Safety notice or other official document for the visitor to read and accept
Signature
Collect a Signature from the Visitor - use independently or as follow up to the Agreement to collect proof of acceptance

	Status Location	Ask the visitor to set their location - provides a list of Locations created in the Organization's Admin Panel
	Video	Show the visitor a video - options to skip or force viewing - video must be hosted onine where embed code can be generated
	Webpage	Show the visitor a webpage
	Photo Capture	Capture a photo of the visitor - camera required

3. Then you can enter the question text, and either create a field for it by clicking the + button, or select an already existing field to finish creating the question.



4. Once you've entered the Question text and field, you can reorder or change the settings for the question.

Video Tutorial

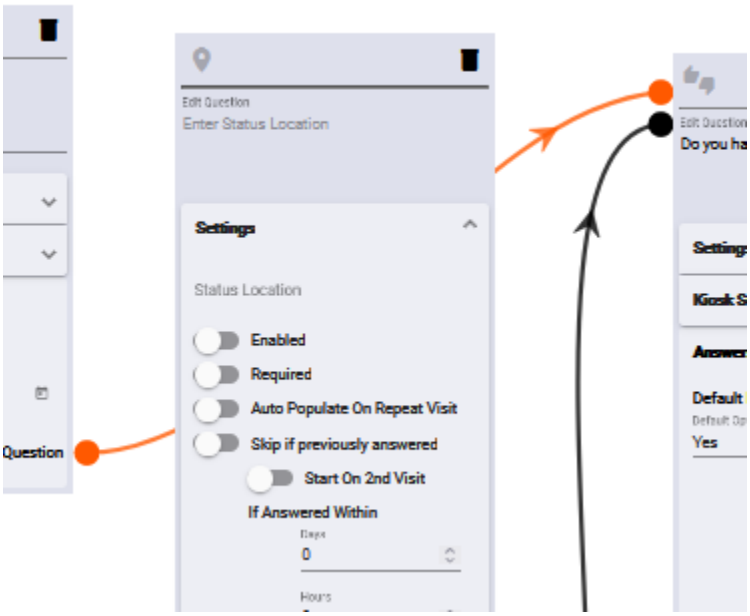
https://drive.google.com/file/d/1_BSdJtftBAIV5C65RQ8sA27ZQ-dPrrHy/view?usp=sharing

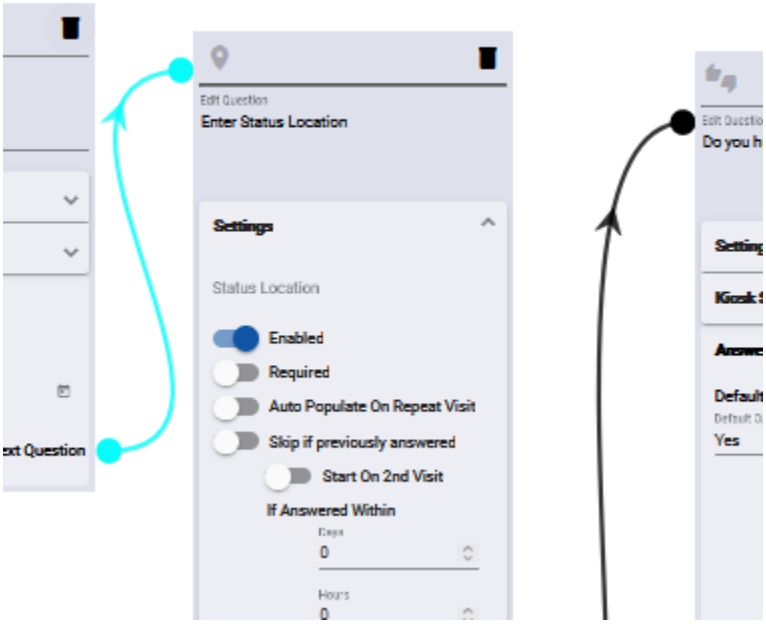
Disabling and Enabling Questions

If you want to remove questions without actually deleting them, so you can re-enable them later without recreating them entirely, it's just two simple steps. Then you can just reverse the steps to re-add the question to the profile in the future.

Disabling:

1. Move the incoming path connection to the next question so that the path goes around the question.
2. Open the settings of the question and uncheck the Enabled field



Enabling:

1. Open the settings of the question and check the Enabled field
2. Move the path connection back to the question so that the path once again includes it.