Kx User Guide

Last Updated 5/11/2021

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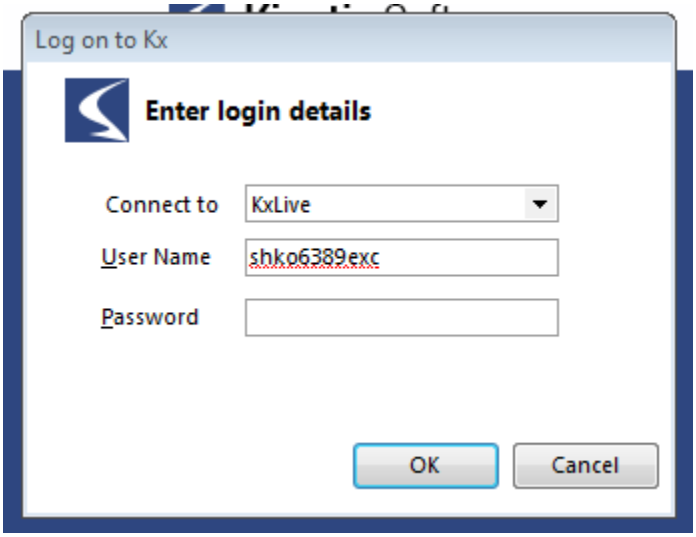
BASIC KX INSTRUCTIONS

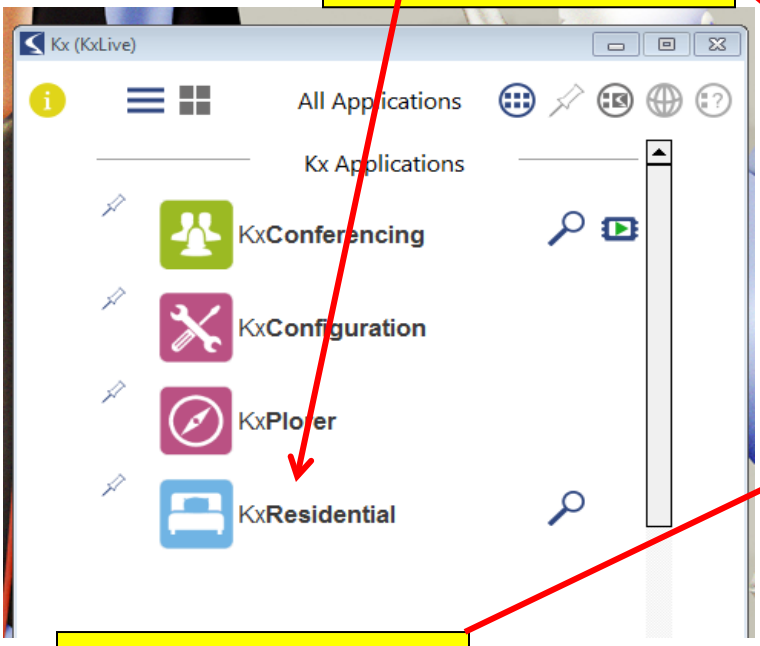
LOG IN TO KX

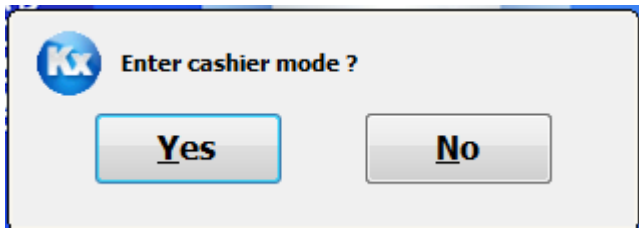
Step 1: Select the "Kx Live" icon on your desktop

Step 2: Log in using your username (your identikey) and password. Click "OK."

Step 3: Select the "Kx Residential" icon.



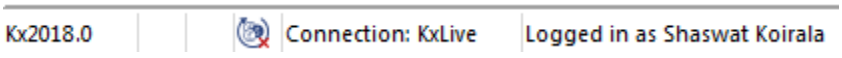




Step 4: A pop-up box will appear asking if you would like to "Enter cashier mode?"

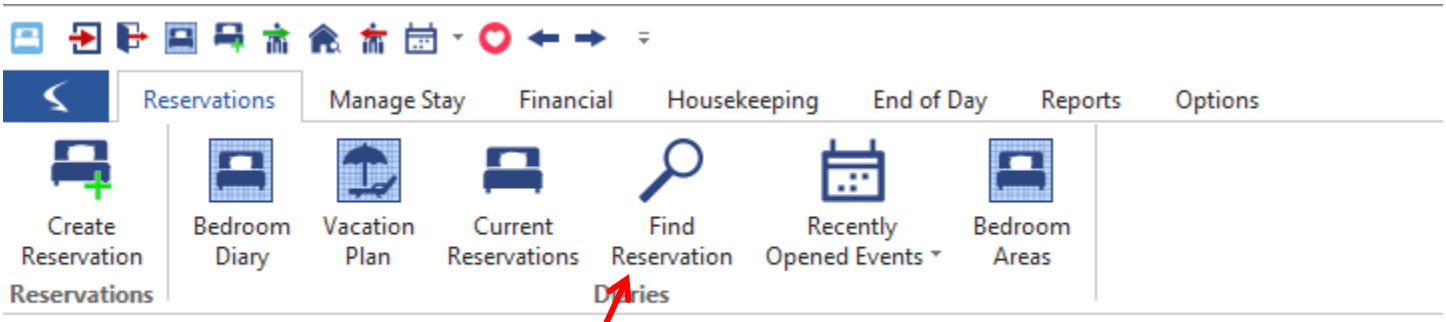
Always Select "NO"

We will not be taking any payments at the Residence Hall front desks this summer. If you accidentally select YES, please start over, log out, and go back into Kx.

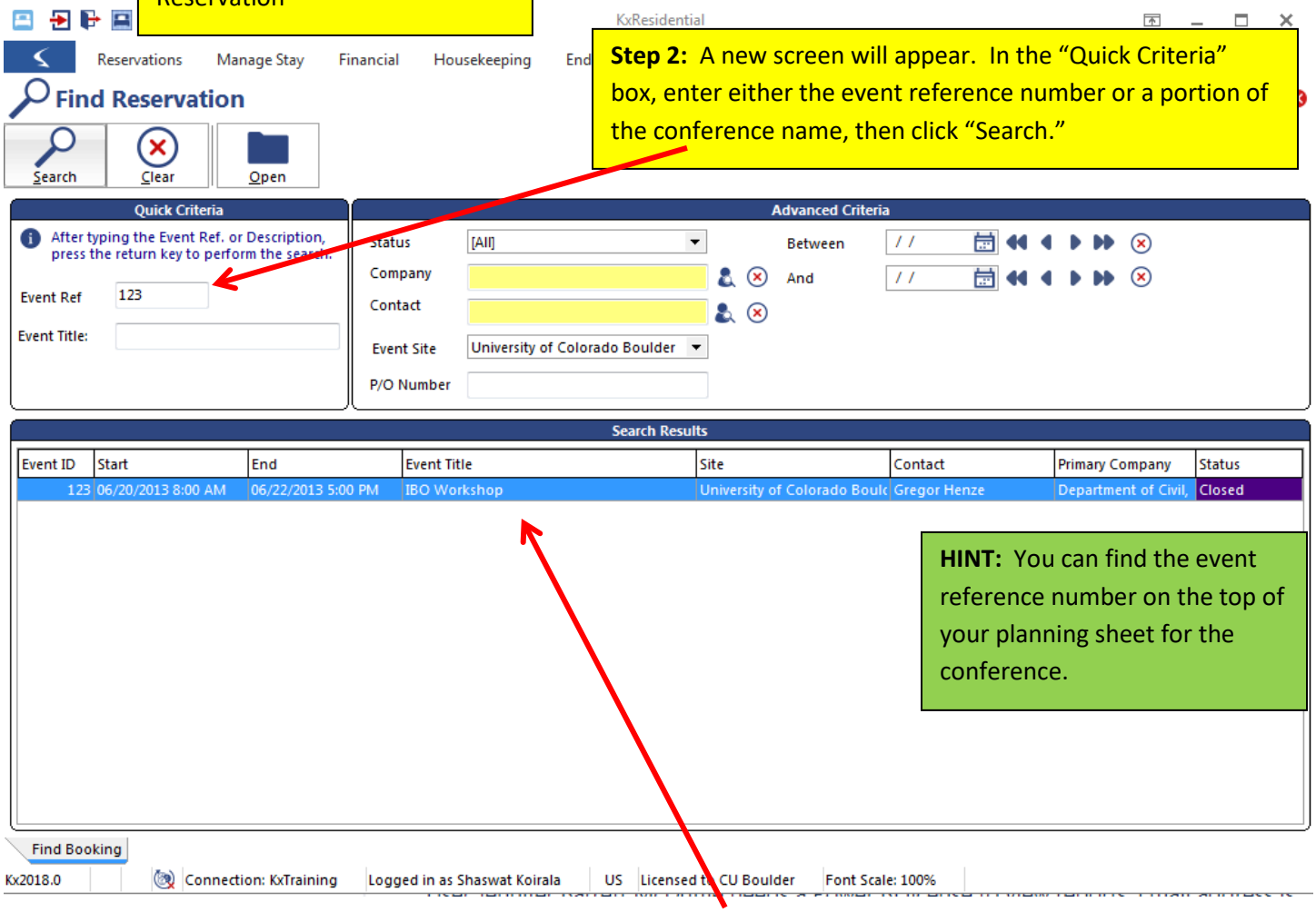


Step 5: Double check that you are in the correct version of Kx by looking in the bottom left corner. It should say "Connection: Kx Live" (NOT "Connection: Kx Training)

FIND A CONFERENCE



Step 1: Under the "Reservations" tab, select "Find Reservation"

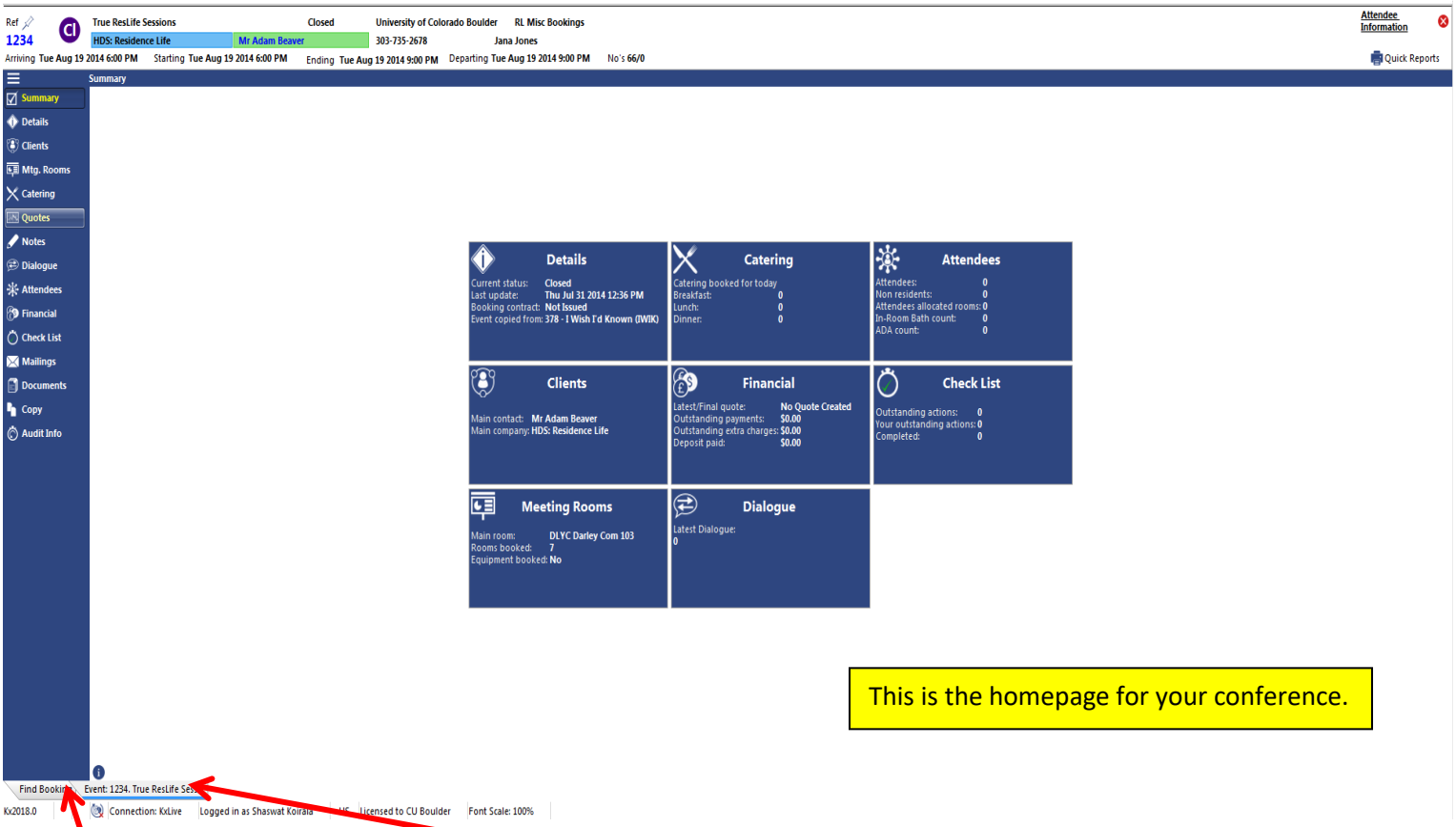


Step 2: A new screen will appear. In the "Quick Criteria" box, enter either the event reference number or a portion of the conference name, then click "Search."

HINT: You can find the event reference number on the top of your planning sheet for the conference.

Step 3: A list of conferences should appear. Highlight your conference, then double click it

VIEW CONFERENCE DETAILS



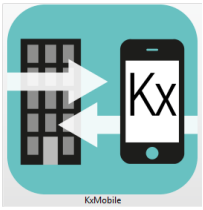
This is the homepage for your conference.

HINT: To open another conference, click the "Find Reservation" tab in the bottom left hand corner and follow the instructions to "Find a Conference."

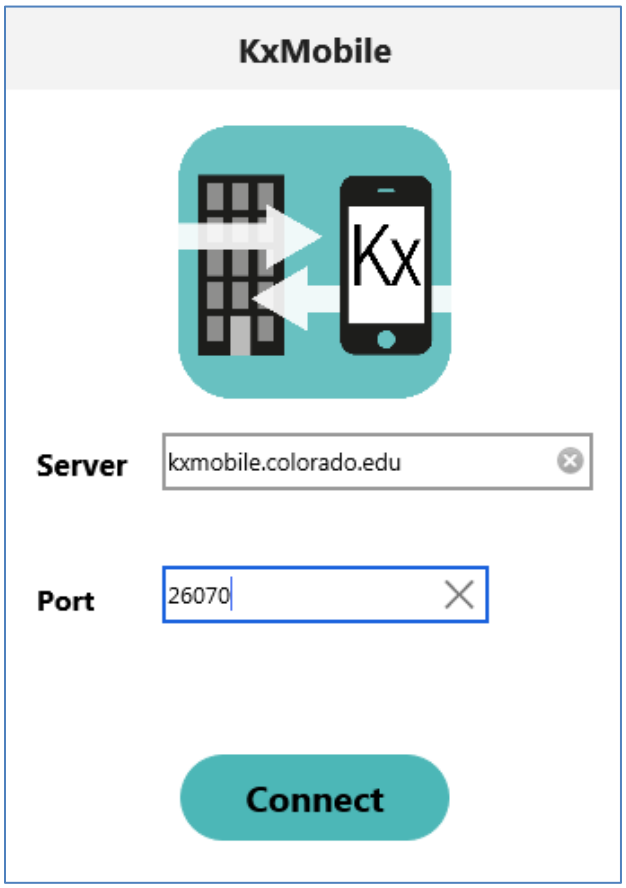
HINT: To quickly toggle between conferences, use the tabs in the bottom left hand corner of your screen.

LOG INTO KXMOBILE

Step 1: Click on the KxMobile icon on the iPad.



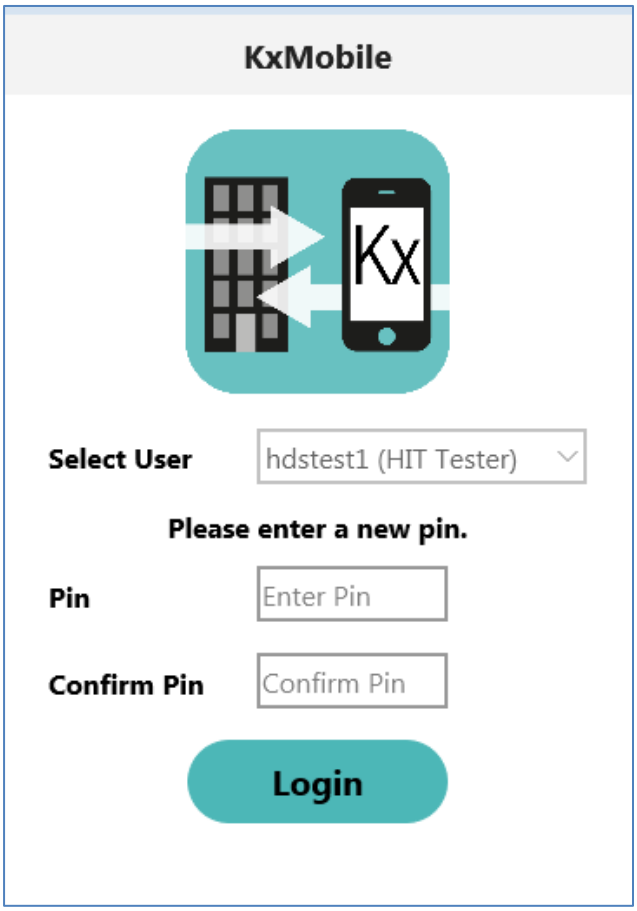
Step 2: If KxMobile is not connected, enter the Server and Port information and click Connect.



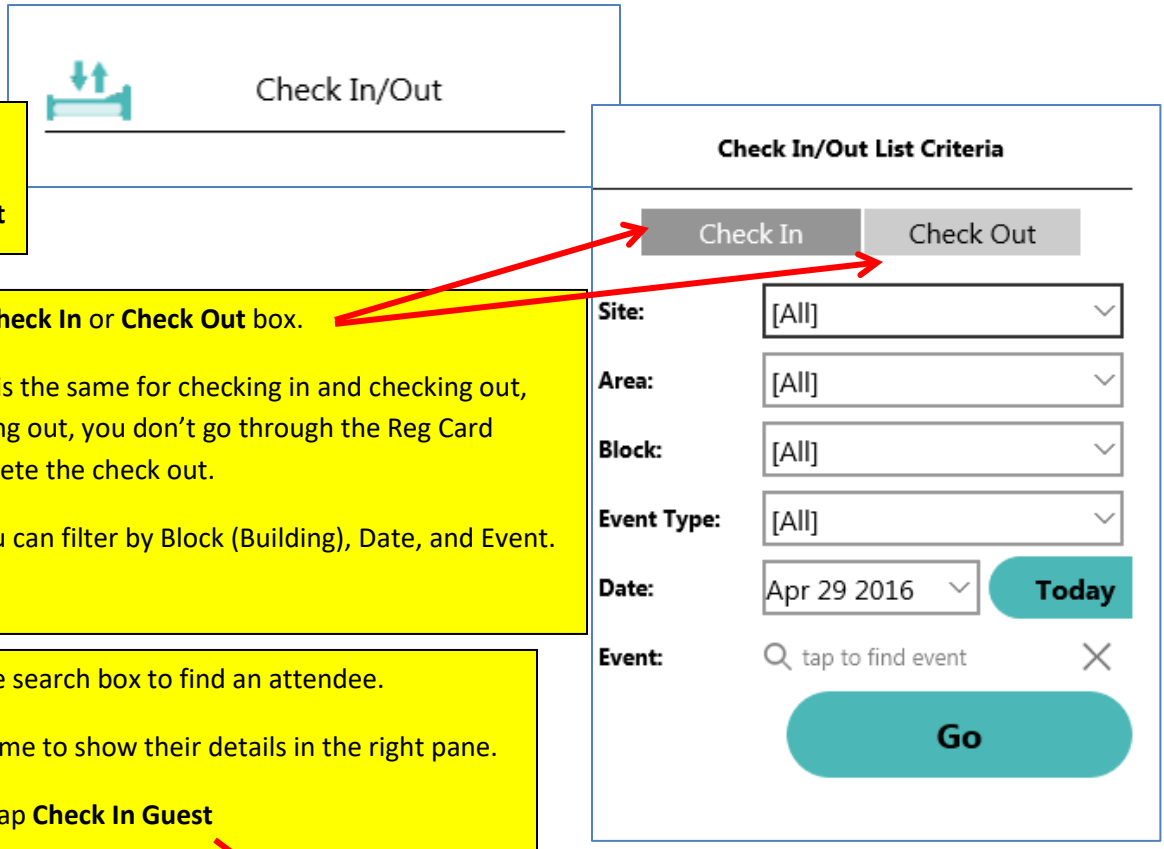
Step 3: Log in with your PIN.

When you first log in to KxMobile on any particular device, you will need to set a PIN. This pin is specific to that device, but it's recommended to use the same pin for each device so you don't forget.

If you don't see your username in the dropdown list, email hdskx@colorado.edu with your name and the name on the device.



CHECK IN AN ATTENDEE PART I



Step 1: Log into KxMobile and choose **Check In/Out**

Step 2: Select the **Check In** or **Check Out** box.

NOTE: The process is the same for checking in and checking out, except when checking out, you don't go through the Reg Card process – just complete the check out.

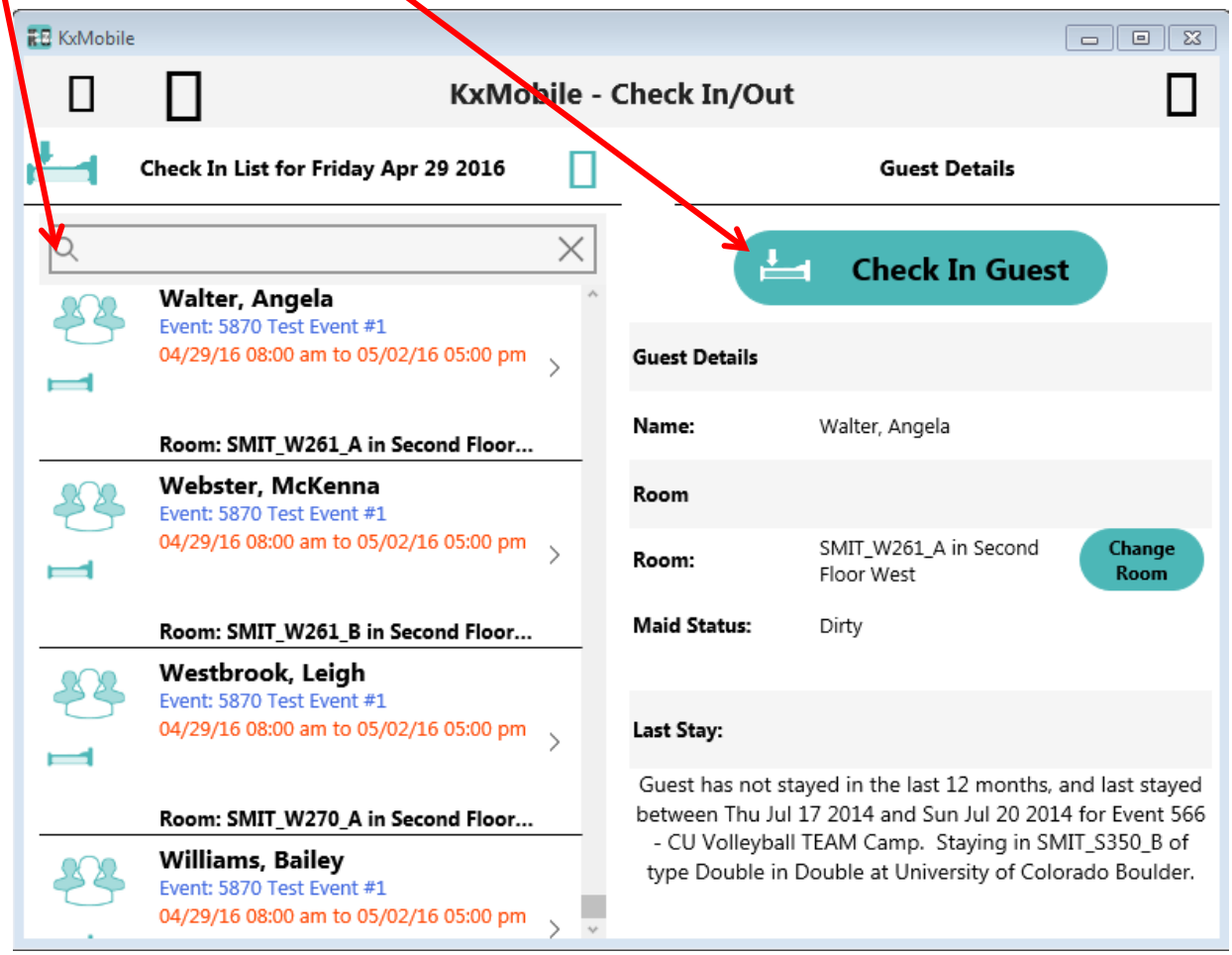
From this screen you can filter by Block (Building), Date, and Event.

Click **Go.**

Step 3: Use the search box to find an attendee.

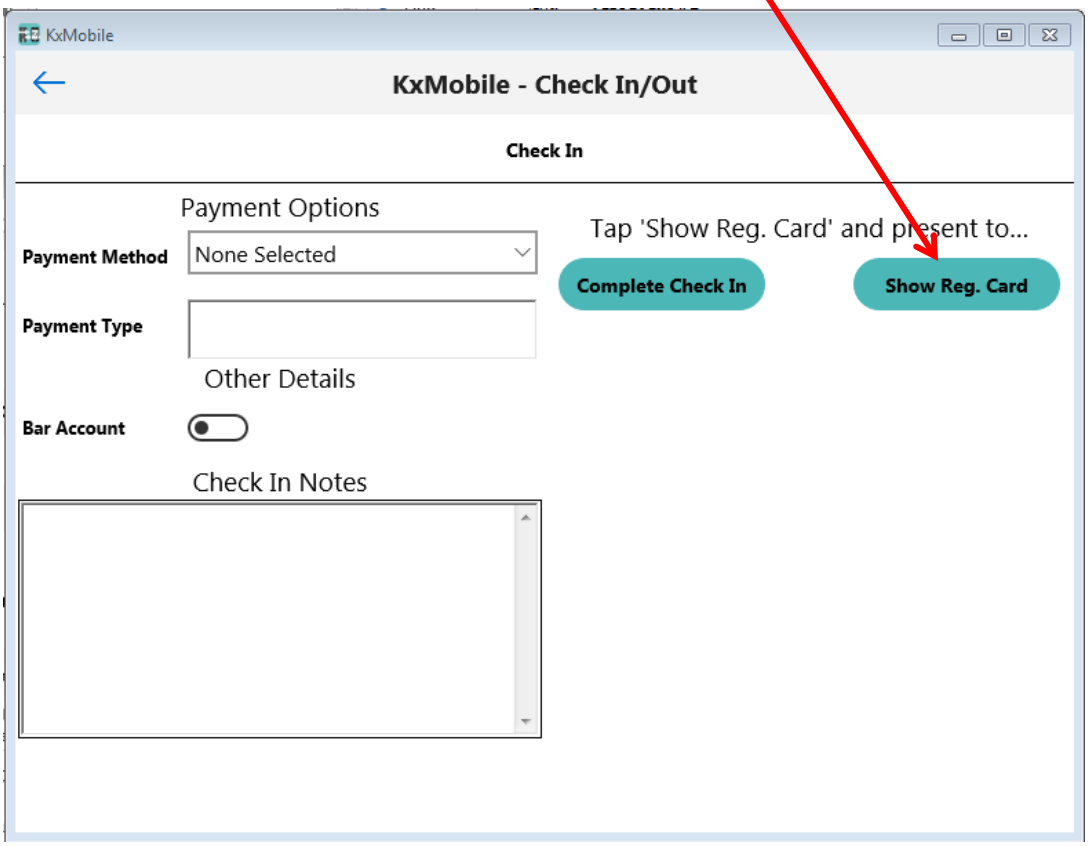
Tap on their name to show their details in the right pane.

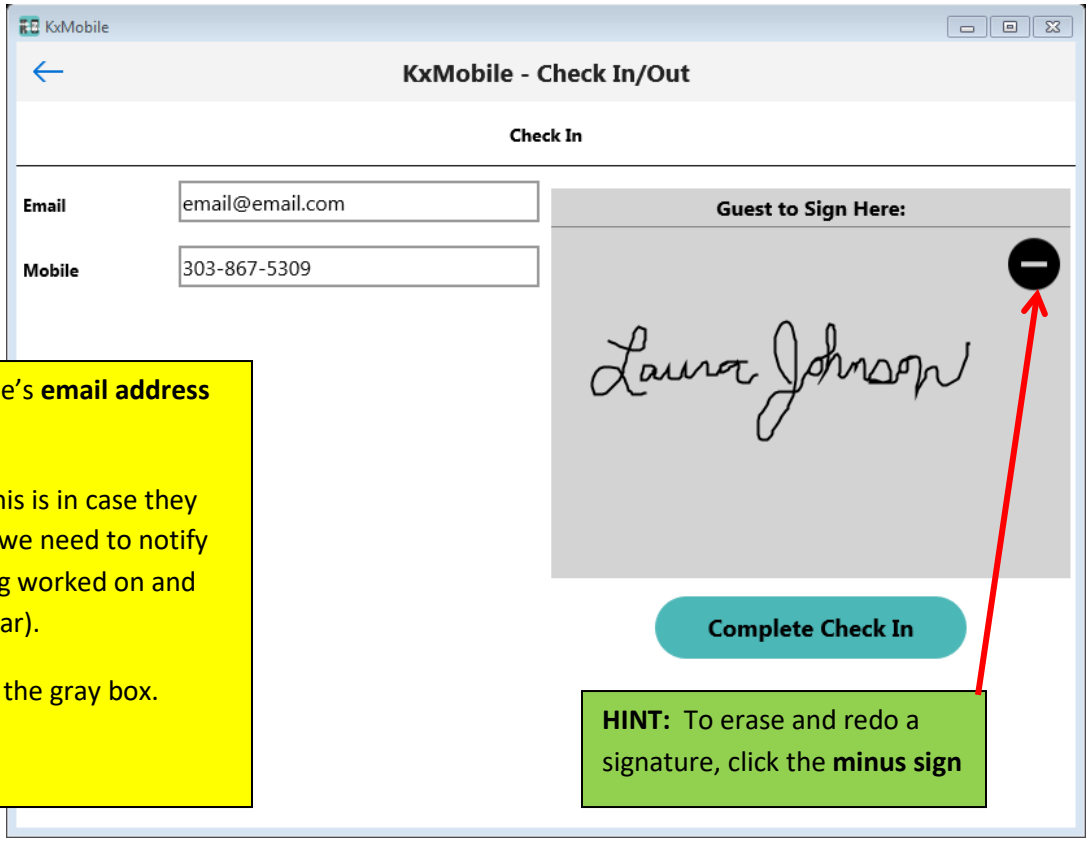
Then, tap **Check In Guest**



CHECK IN AN ATTENDEE PART II

Step 4: Tap **Show Reg. Card**





Step 5: Enter the attendee's **email address** and **phone number**

(Only for adult groups – this is in case they buy a parking permit and we need to notify them that their lot is being worked on and they need to move their car).

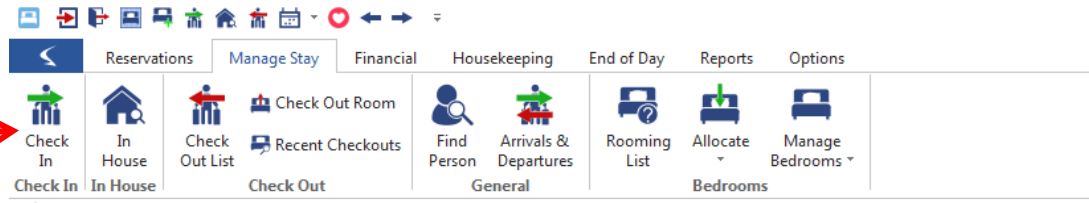
Have the attendee sign in the gray box.

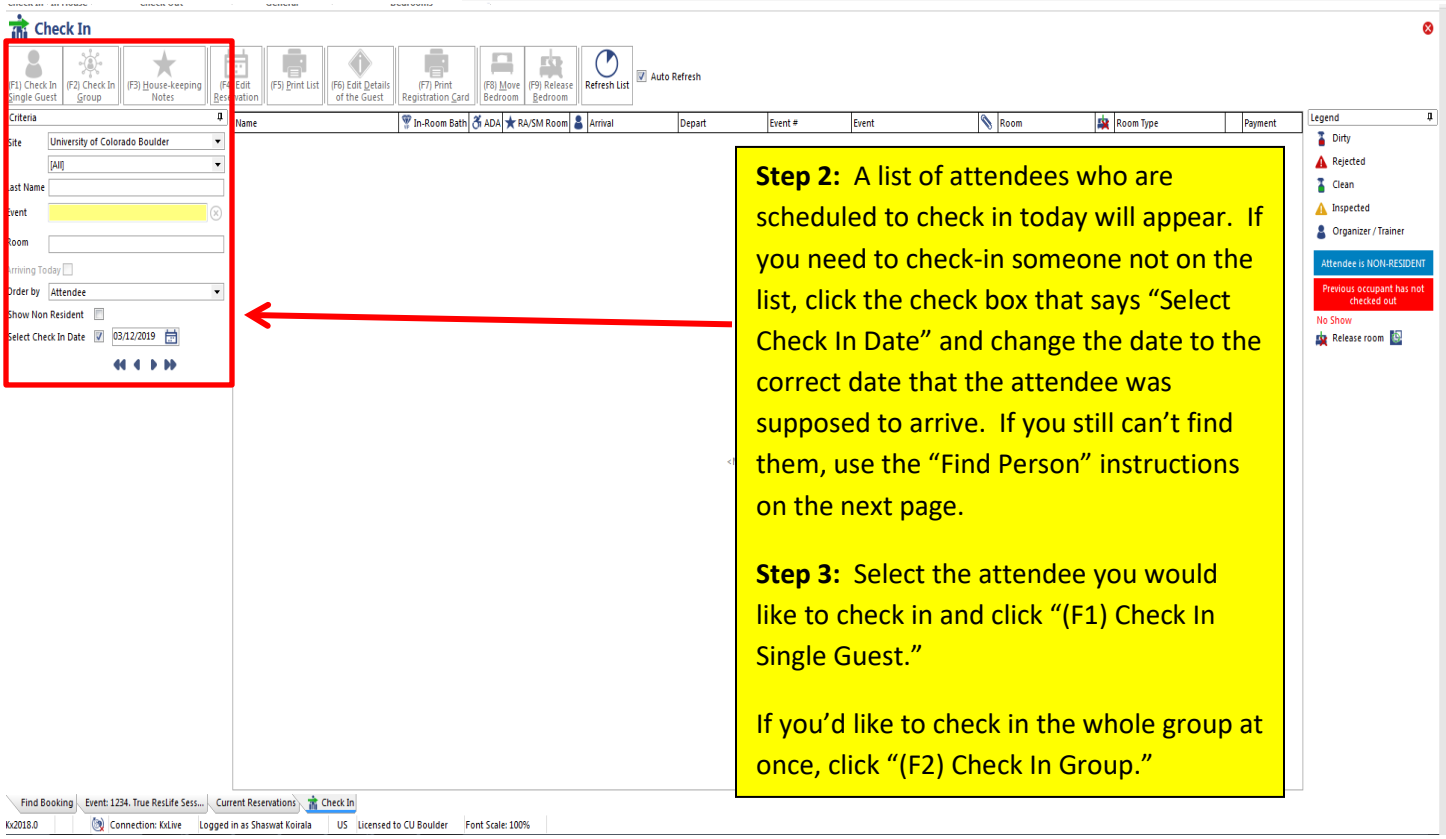
Tap **Complete Check In.**

HINT: To erase and redo a signature, click the **minus sign**

MANUALLY CHECK IN AN ATTENDEE OR GROUP

Step 1: In the "Manage Stay" tab, select "Check In."

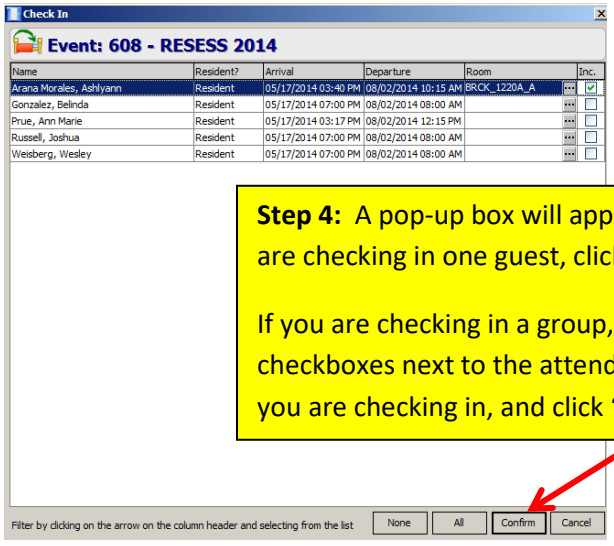




Step 2: A list of attendees who are scheduled to check in today will appear. If you need to check-in someone not on the list, click the check box that says "Select Check In Date" and change the date to the correct date that the attendee was supposed to arrive. If you still can't find them, use the "Find Person" instructions on the next page.

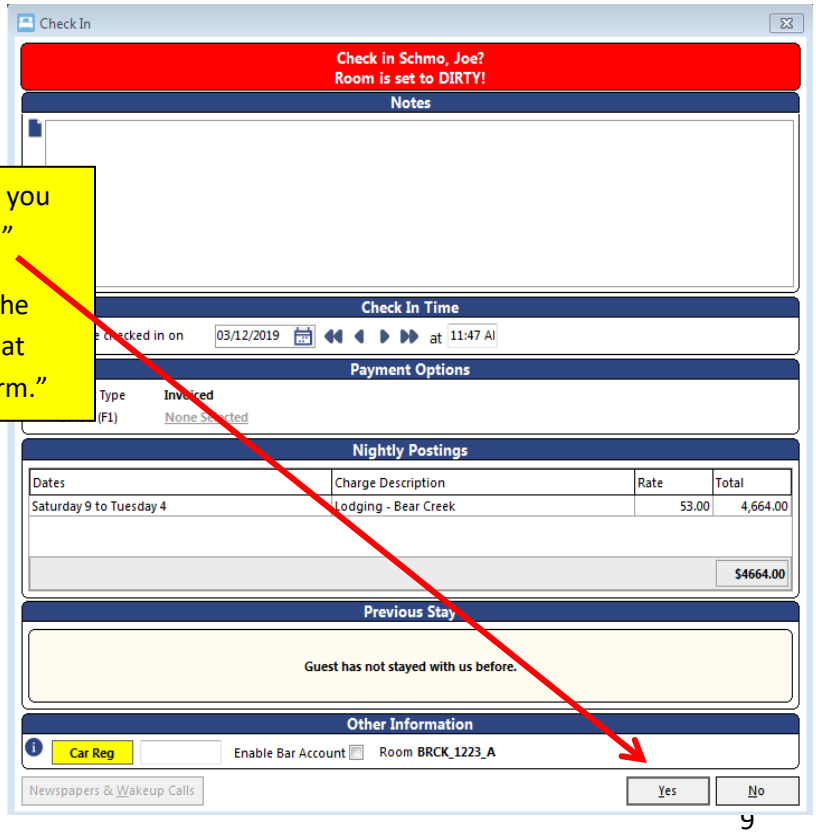
Step 3: Select the attendee you would like to check in and click "(F1) Check In Single Guest."

If you'd like to check in the whole group at once, click "(F2) Check In Group."



Step 4: A pop-up box will appear. If you are checking in one guest, click "Yes."

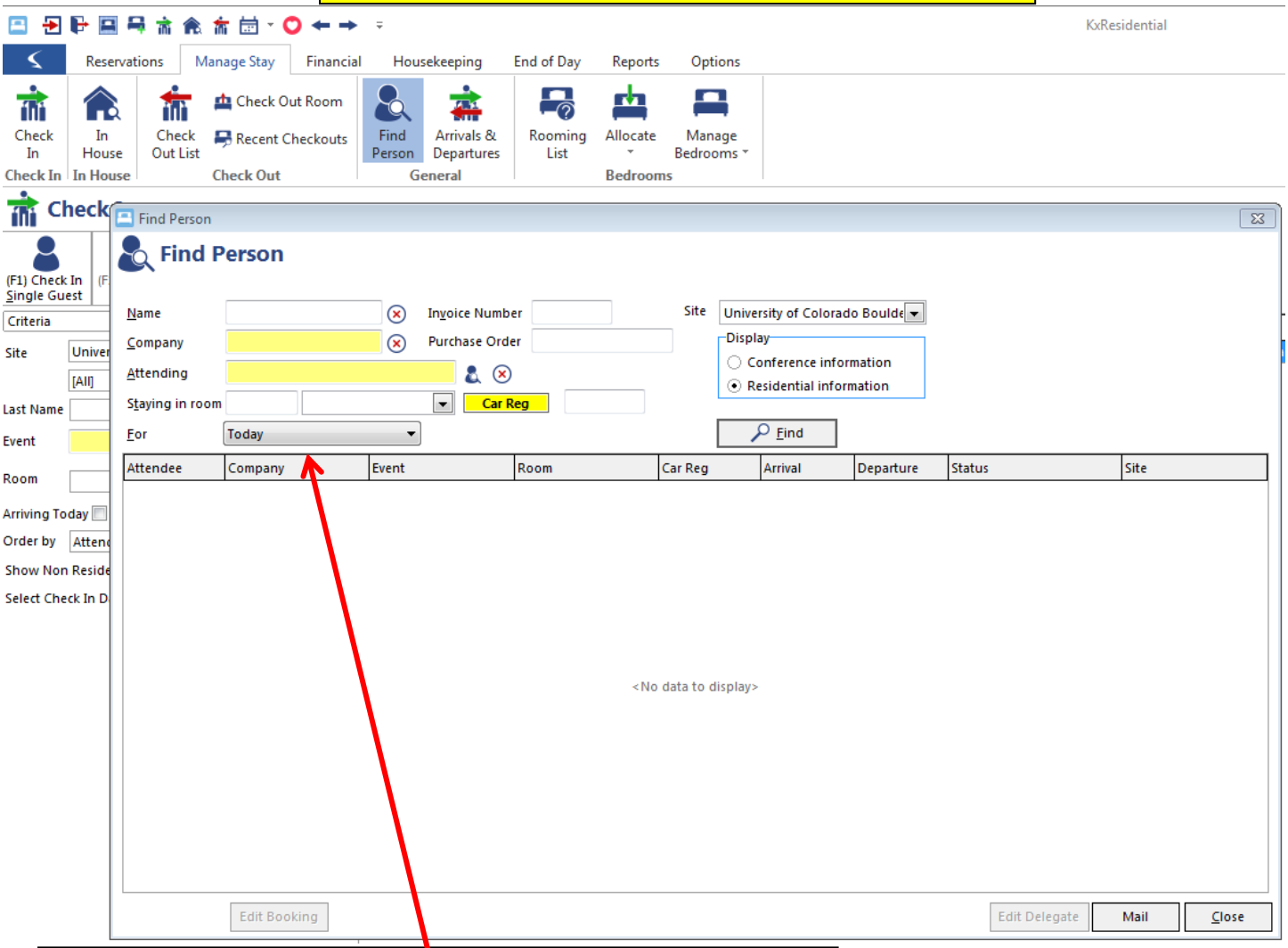
If you are checking in a group, click the checkboxes next to the attendees that you are checking in, and click "Confirm."



WARNING! ALL check-ins must be done through KxMobile unless Andrea approves a check-in to be done manually. Manual check-ins do not capture signatures, which we need for billing

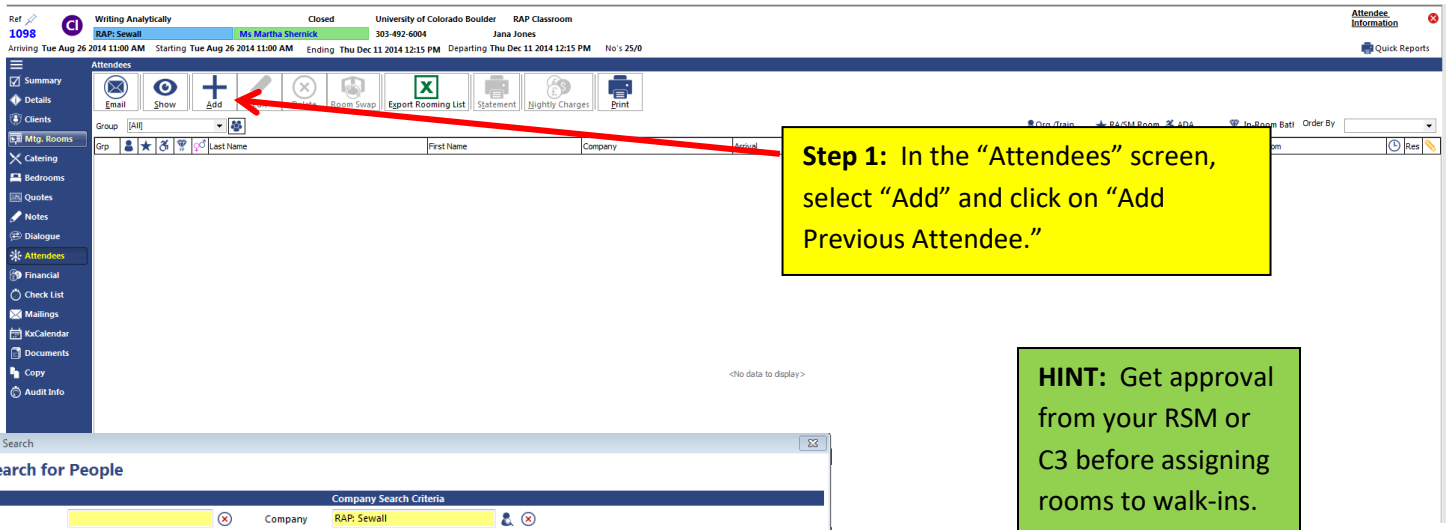
FIND PERSON

Step 1: If you can't find an attendee using the "Check In" screen, use the "Find Person" screen on the "Manage Stay" tab.



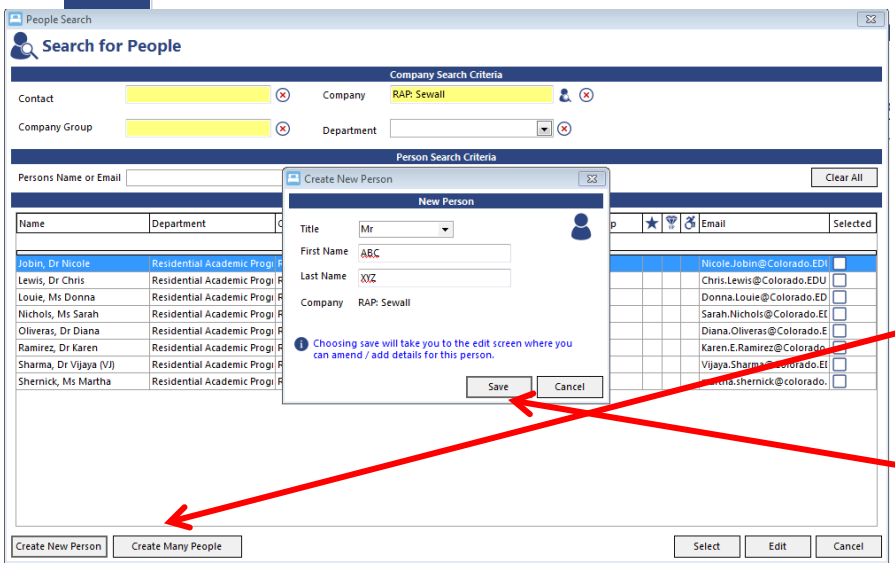
HINT: Make sure to change the "For" dropdown to show All Bookings.

ADD NEW ATTENDEE



Step 1: In the "Attendees" screen, select "Add" and click on "Add Previous Attendee."

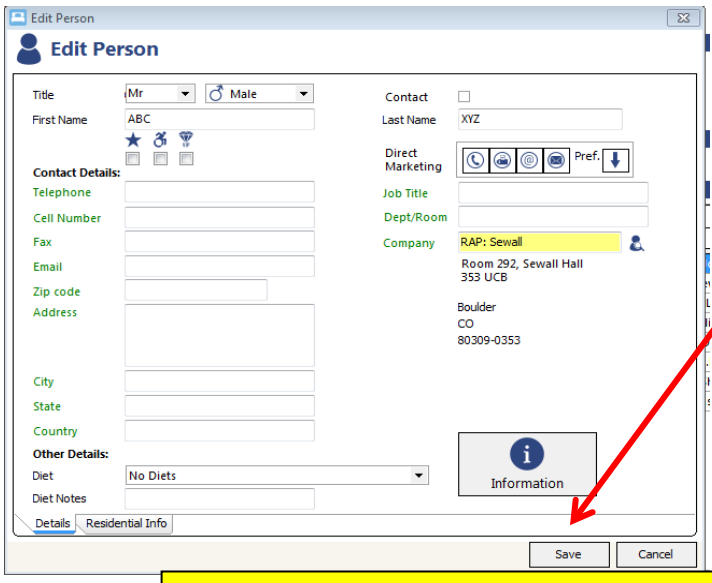
HINT: Get approval from your RSM or C3 before assigning rooms to walk-ins.

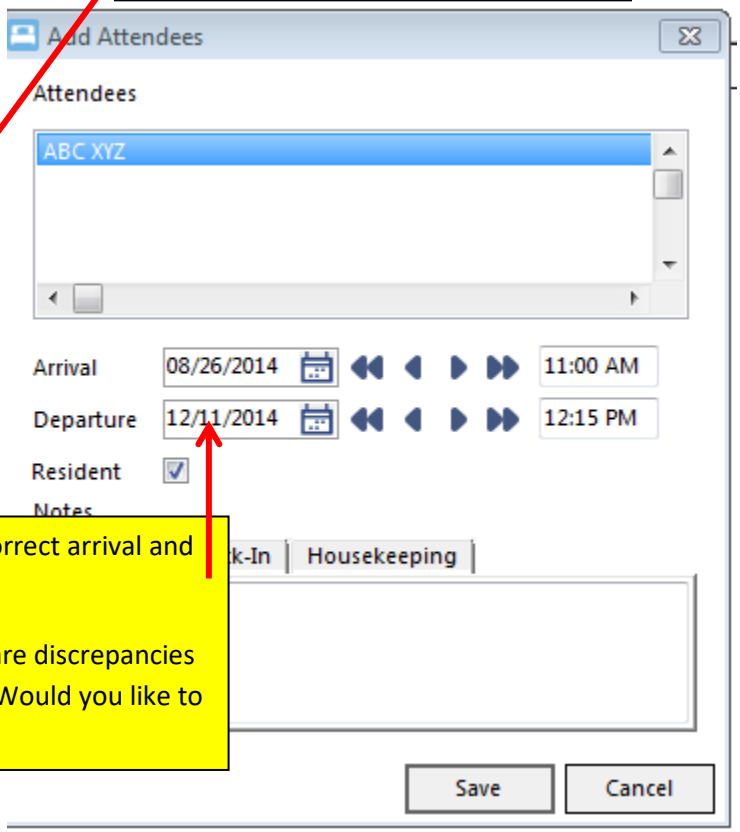


Step 2: A pop-up box will appear. Select "Create New Person."

Step 3: Another pop-up box will appear. Enter the first and last name of the walk-in attendee, then click "Save."

Step 4: Another pop-up box will appear. Click "Save."

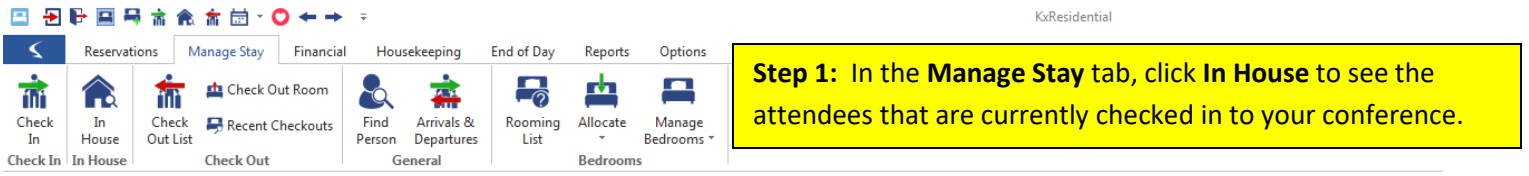




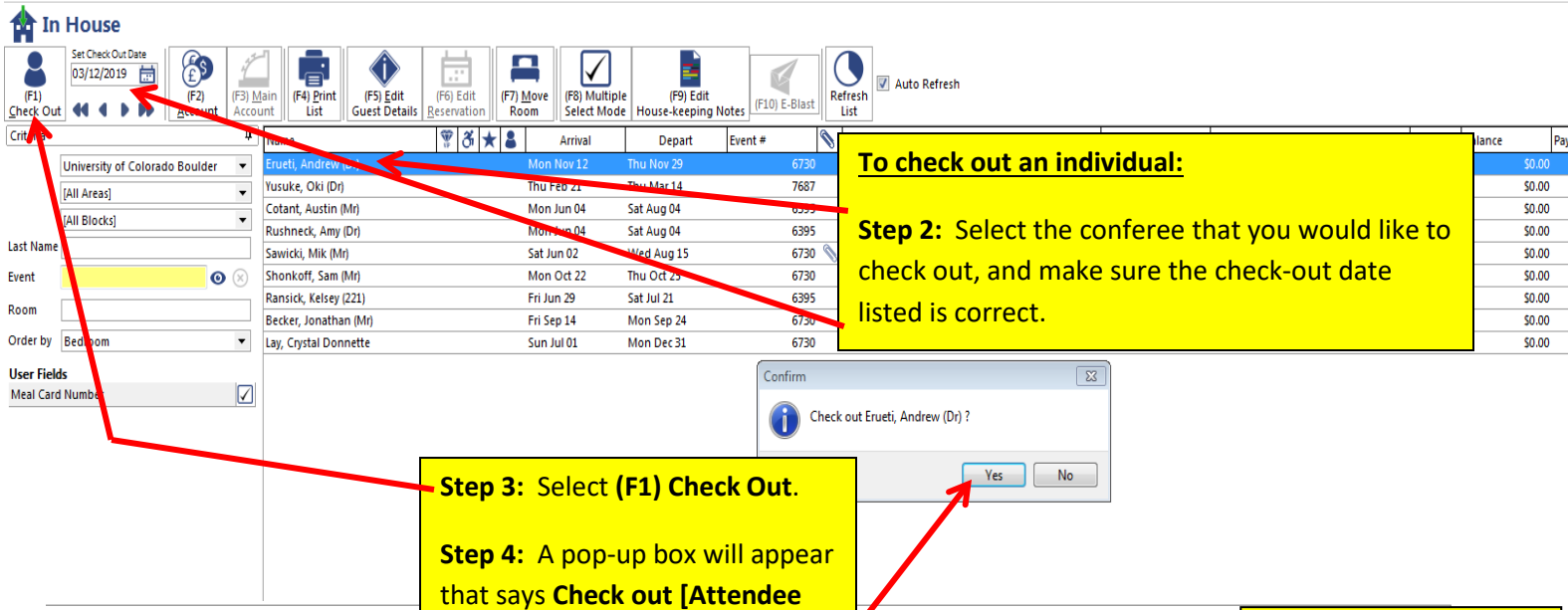
Step 5: Another pop-up box will appear. Enter the correct arrival and departure dates, and click "Save."

Step 6: A pop-up box will appear: "Warning: There are discrepancies between allocations and reservations for this event. Would you like to check them now?" Click "No."

MANUALLY CHECK OUT AN ATTENDEE OR GROUP



Step 1: In the **Manage Stay** tab, click **In House** to see the attendees that are currently checked in to your conference.

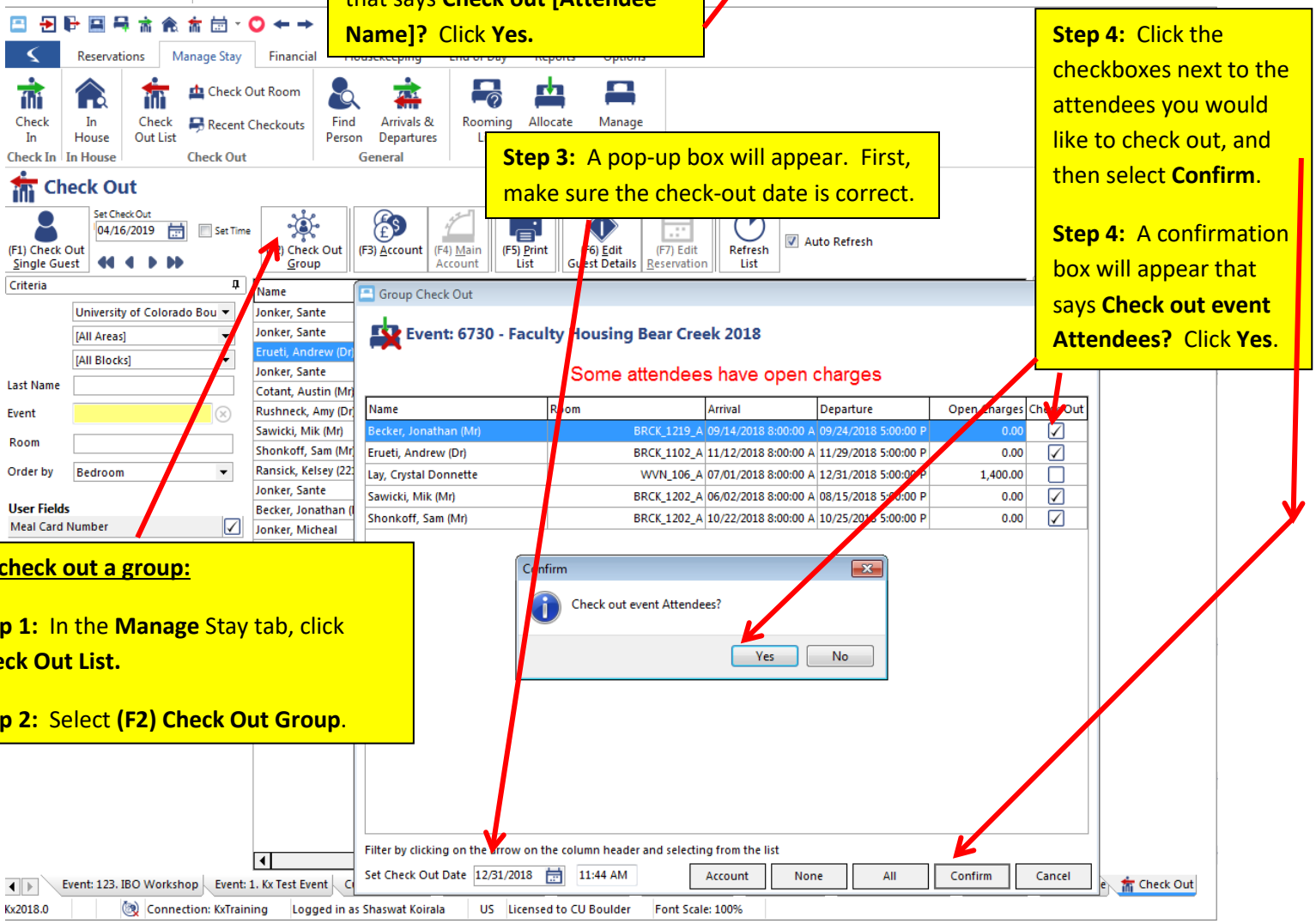


To check out an individual:

Step 2: Select the conferee that you would like to check out, and make sure the check-out date listed is correct.

Step 3: Select **(F1) Check Out**.

Step 4: A pop-up box will appear that says **Check out [Attendee Name]?** Click **Yes.**



Step 3: A pop-up box will appear. First, make sure the check-out date is correct.

Step 4: Click the checkboxes next to the attendees you would like to check out, and then select **Confirm**.

Step 4: A confirmation box will appear that says **Check out event Attendees?** Click **Yes**.

To check out a group:

Step 1: In the **Manage** Stay tab, click **Check Out List.**

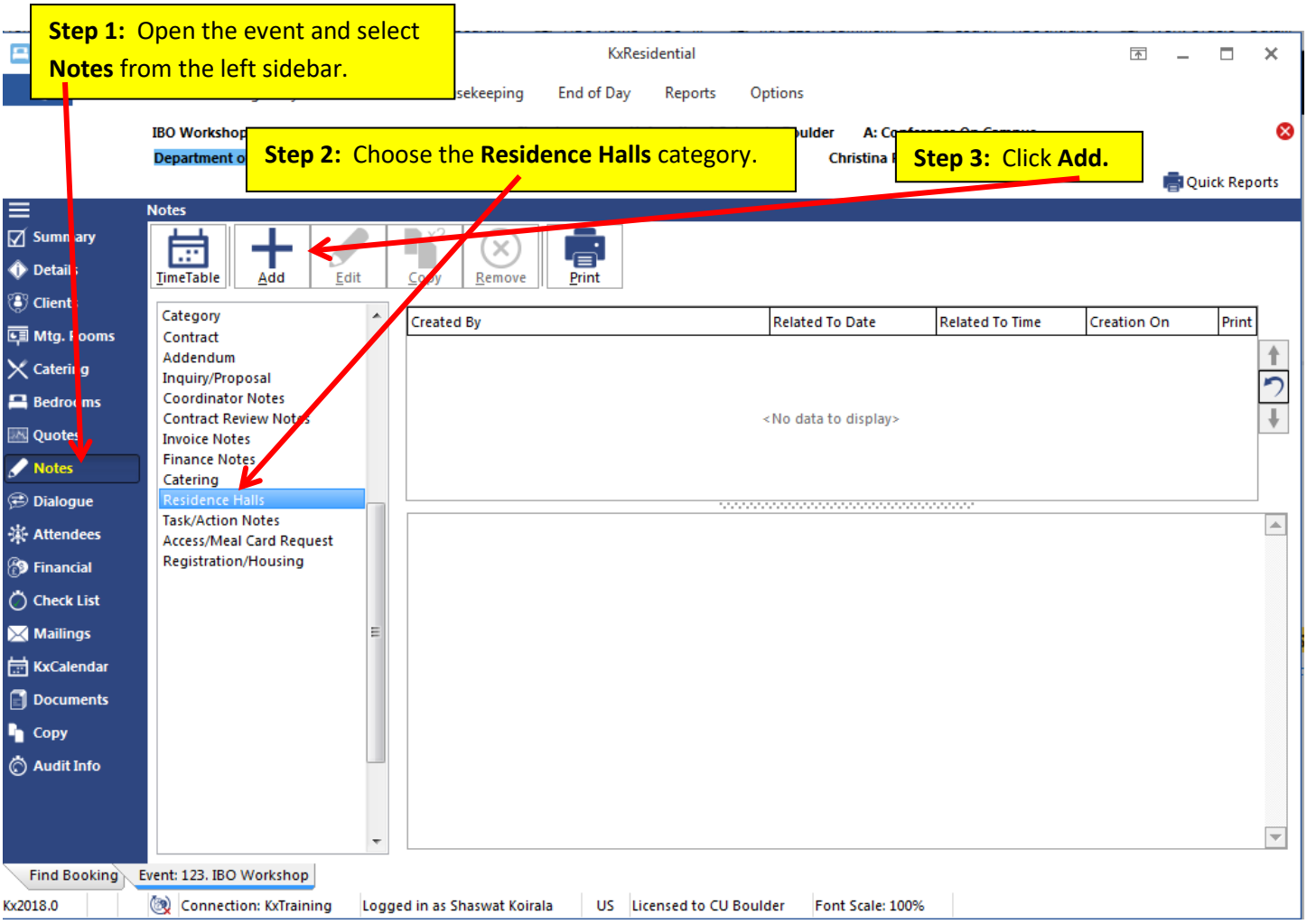
Step 2: Select **(F2) Check Out Group**.

CONFERENCE PREP (FOR RSMS AND C3S)

ADD NOTES FOR CONFERENCE COORDINATORS PART I

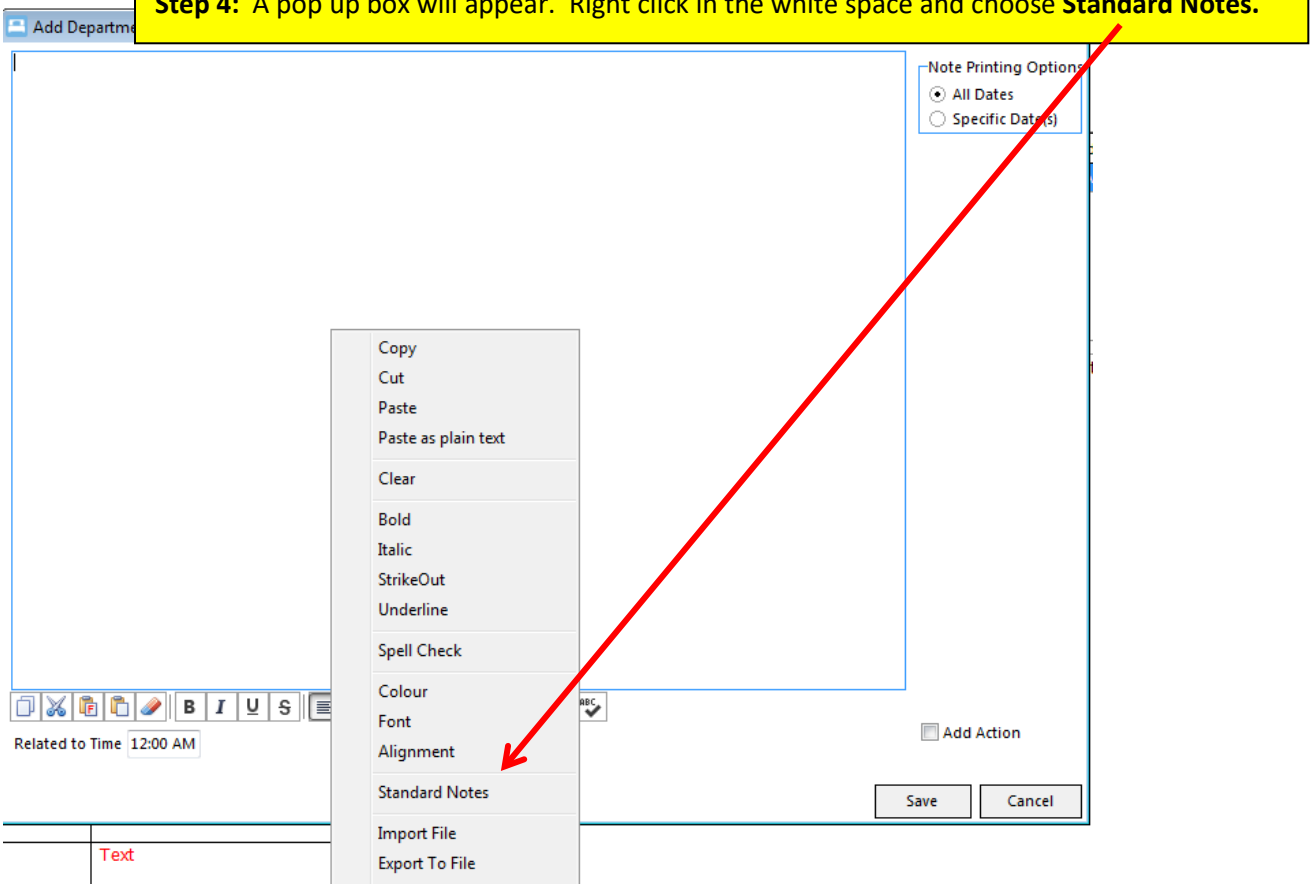
You will add three standard notes in Kx to communicate important info to the Conference Coordinator

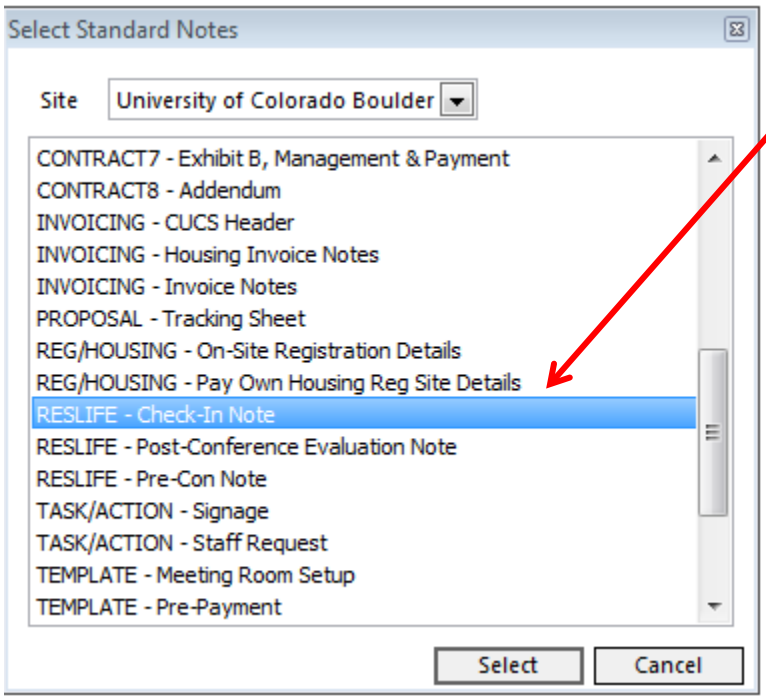
1	**Pre-Con Note**	Due 1-2 weeks before the group arrives
2	**Check-In Note**	Due by 5:00 PM on Check In Day
3	**Post-Conference Evaluation Note**	Due 3 business days after the group leaves



ADD NOTES FOR CONFERENCE COORDINATORS PART II

Step 4: A pop up box will appear. Right click in the white space and choose **Standard Notes.**



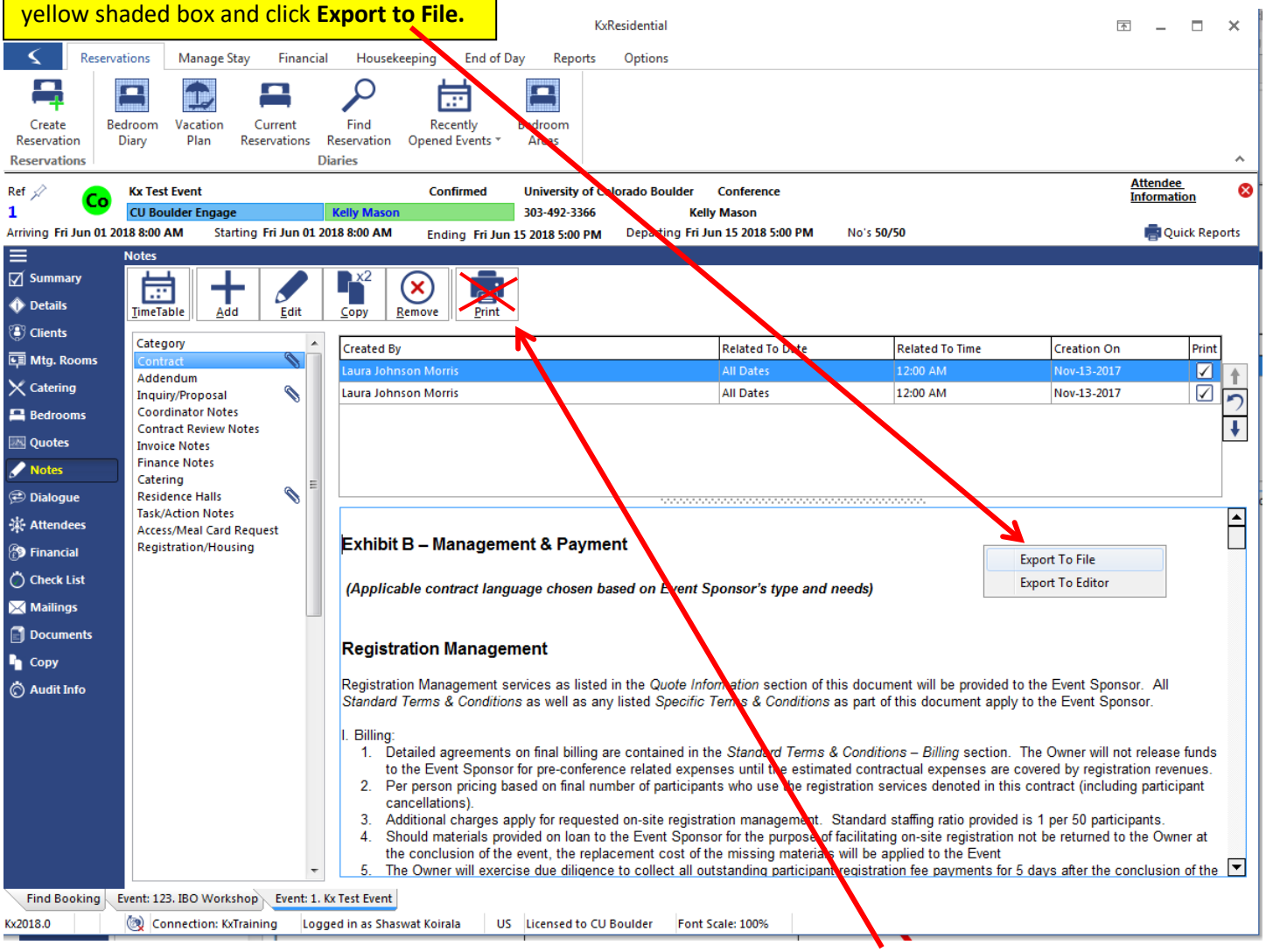


Step 5: Choose the correct template from the list and click **Select.**

When you're done editing the Note, click **Save.**

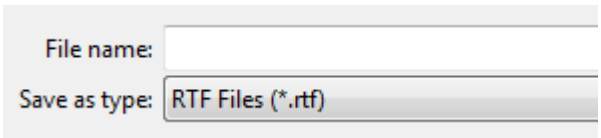
PRINT NOTES

Step 1: To print a note, right click in the yellow shaded box and click **Export to File.**



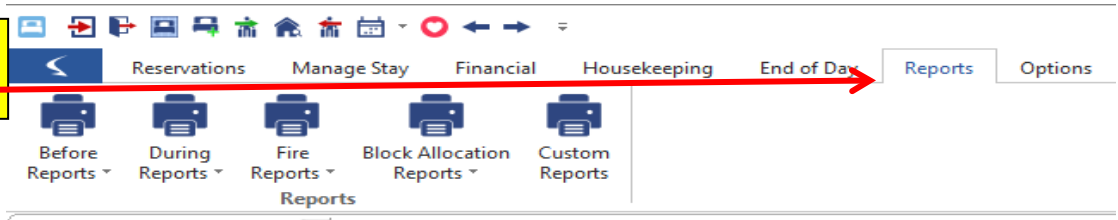
HINT: Don't use the **Print** button in the Top Left as it won't format the tables properly.

Step 2: Save it as an RTF File – these files open in Microsoft Word. Then, you can open the document and print it.

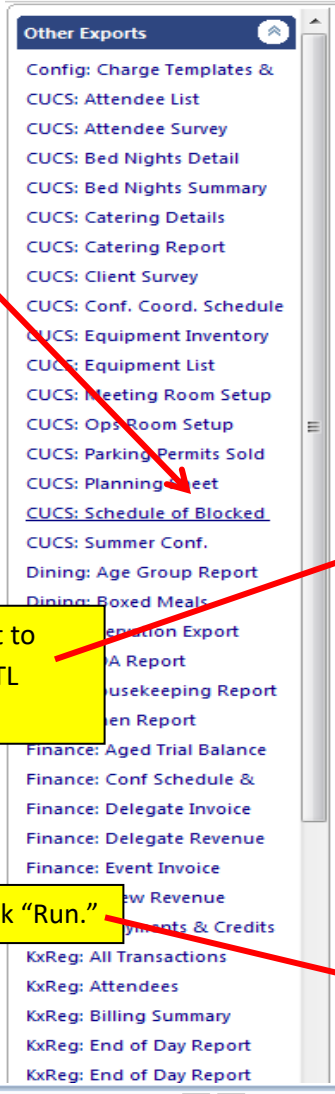


PRINT THE PLANNING SHEET

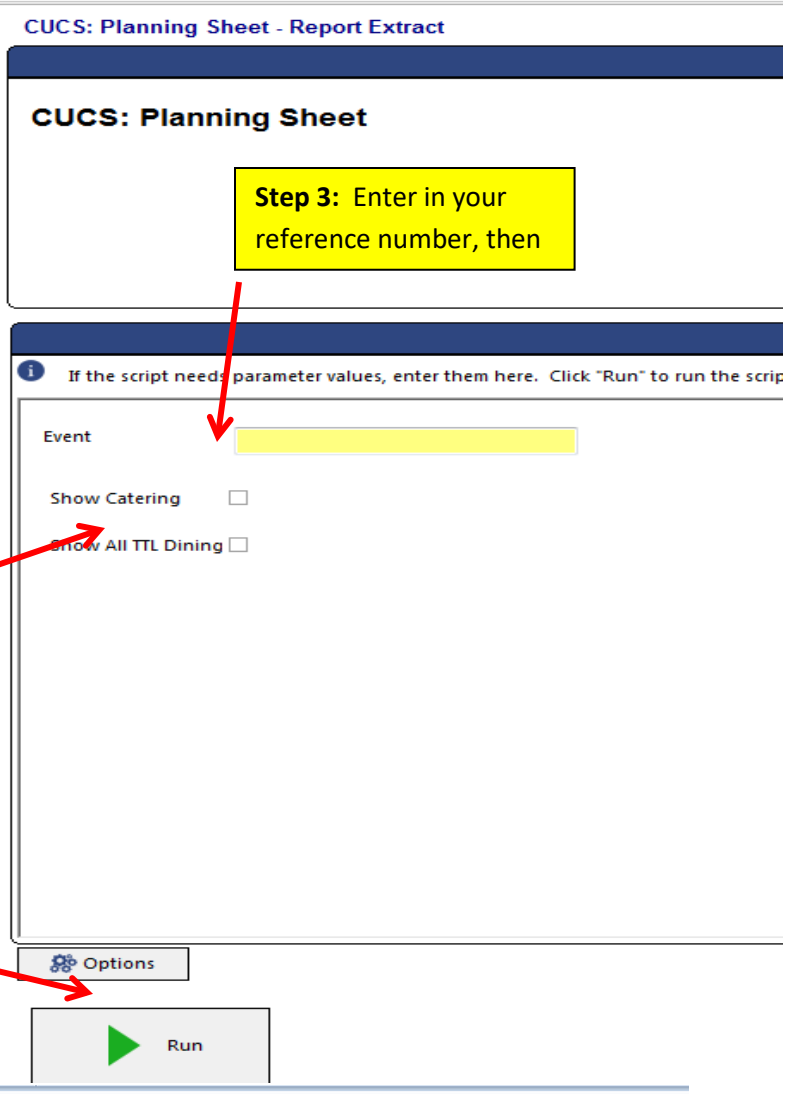
Step 1: Go to the "Reports" tab and click on "Custom Reports."



Step 2: Click on "CUCS: Planning Sheet."



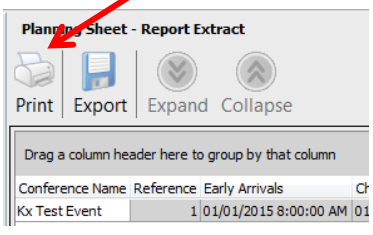
Step 3: Enter in your reference number, then

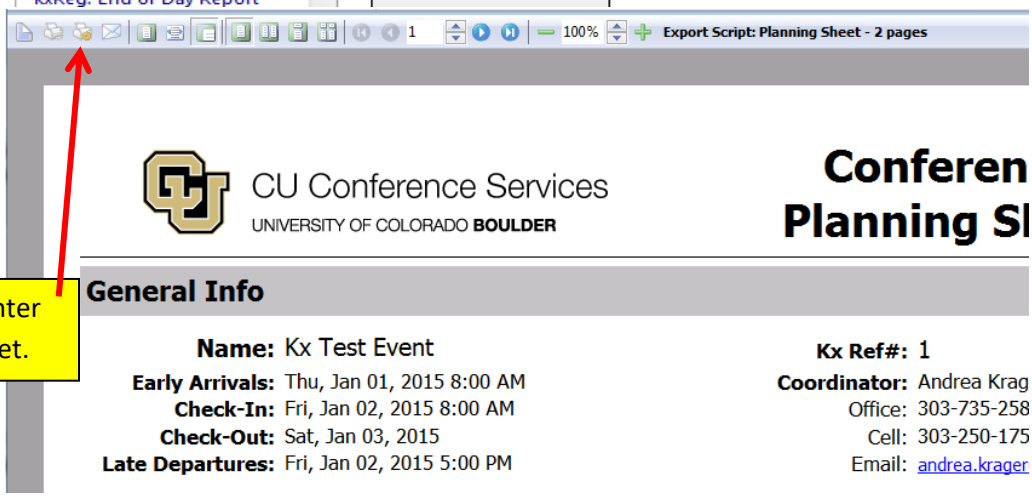


Step 4: Click the checkboxes next to "Show Catering" and "Show All TTL Dining."

Step 4: Click "Run."

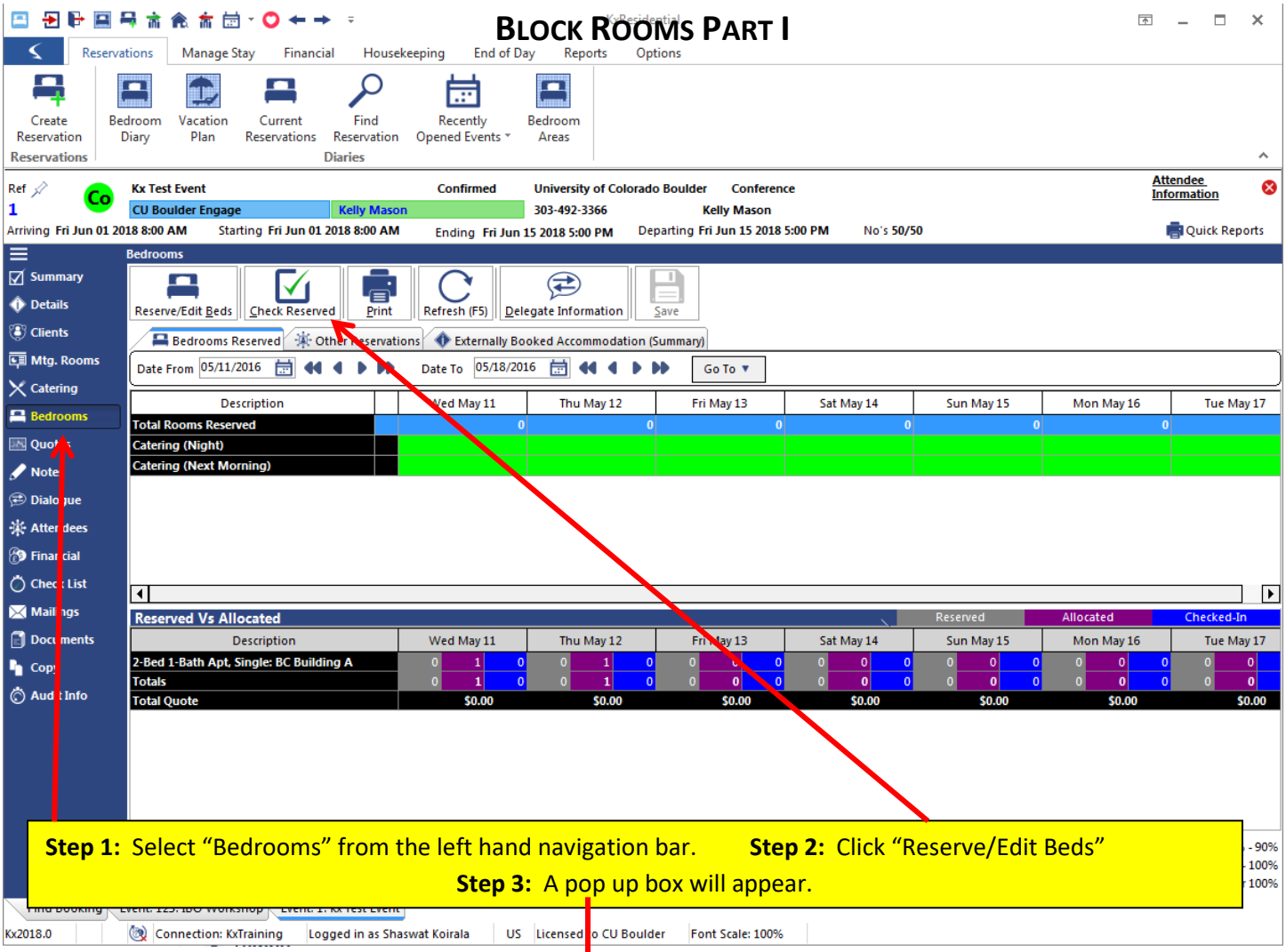
Step 5: On the next screen, click "Print."





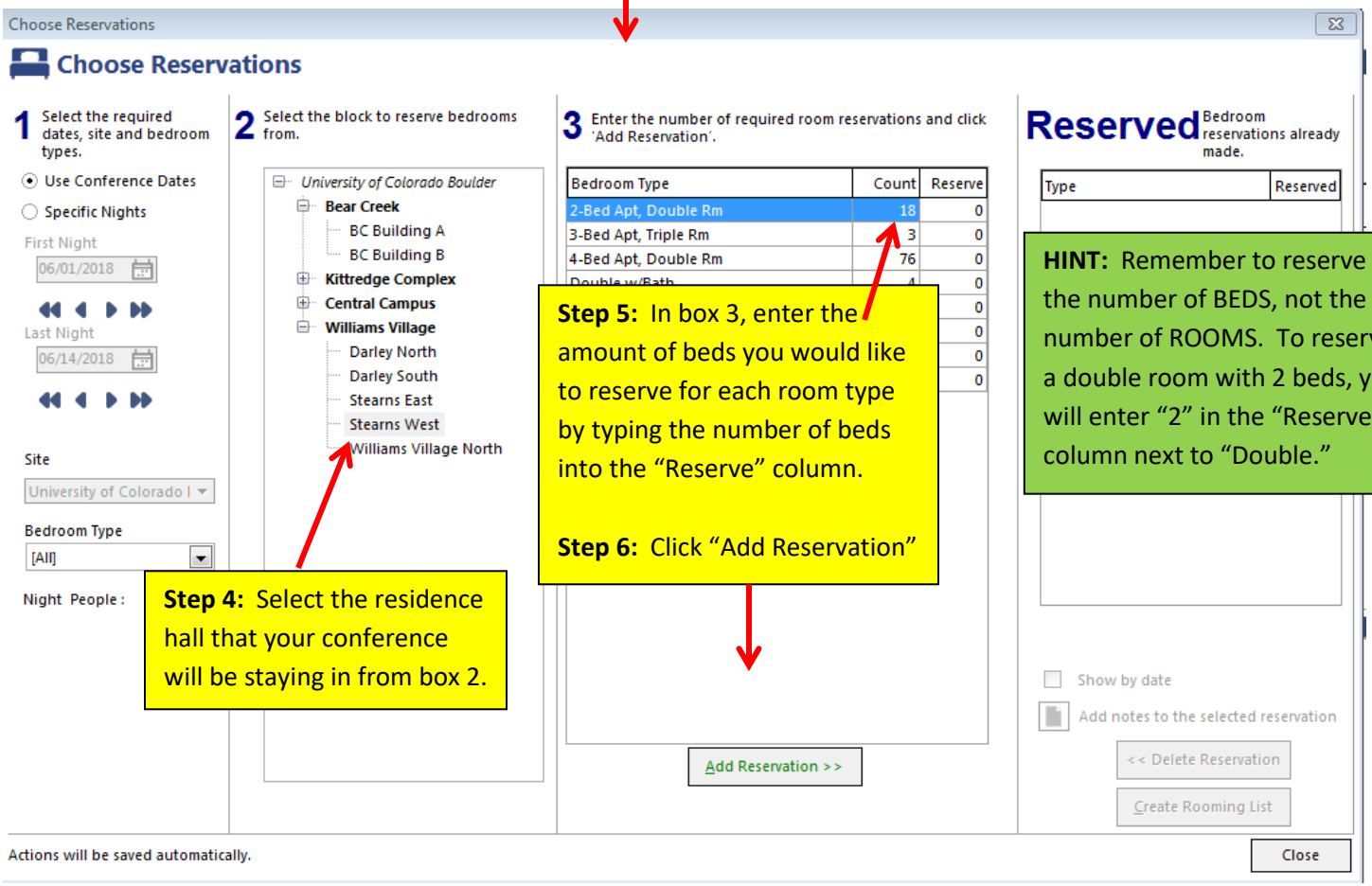
Step 6: Then, click on the printer icon to print the Planning Sheet.

Block Rooms Part I



Step 1: Select "Bedrooms" from the left hand navigation bar. **Step 2:** Click "Reserve/Edit Beds"

Step 3: A pop up box will appear.



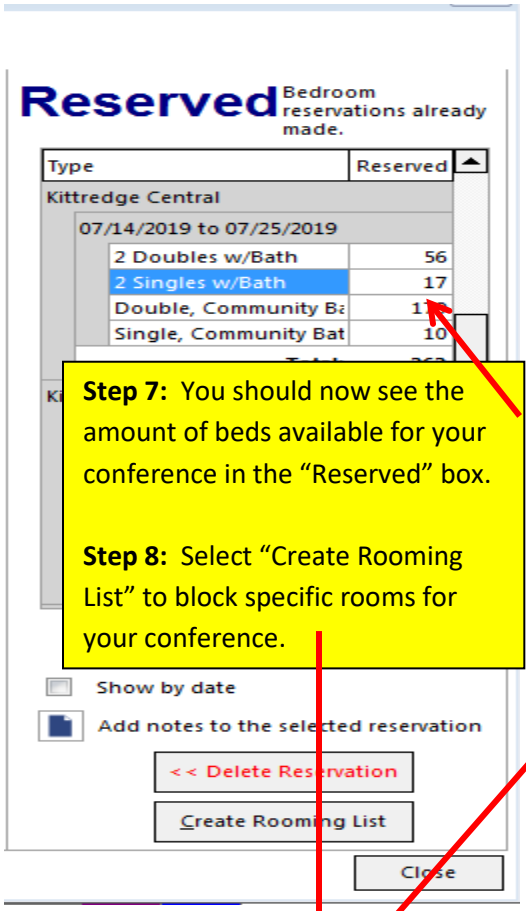
Step 4: Select the residence hall that your conference will be staying in from box 2.

Step 5: In box 3, enter the amount of beds you would like to reserve for each room type by typing the number of beds into the "Reserve" column.

Step 6: Click "Add Reservation"

HINT: Remember to reserve the number of BEDS, not the number of ROOMS. To reserve a double room with 2 beds, you will enter "2" in the "Reserve" column next to "Double."

BLOCK ROOMS PART II



Step 7: You should now see the amount of beds available for your conference in the "Reserved" box.

Step 8: Select "Create Rooming List" to block specific rooms for your conference.

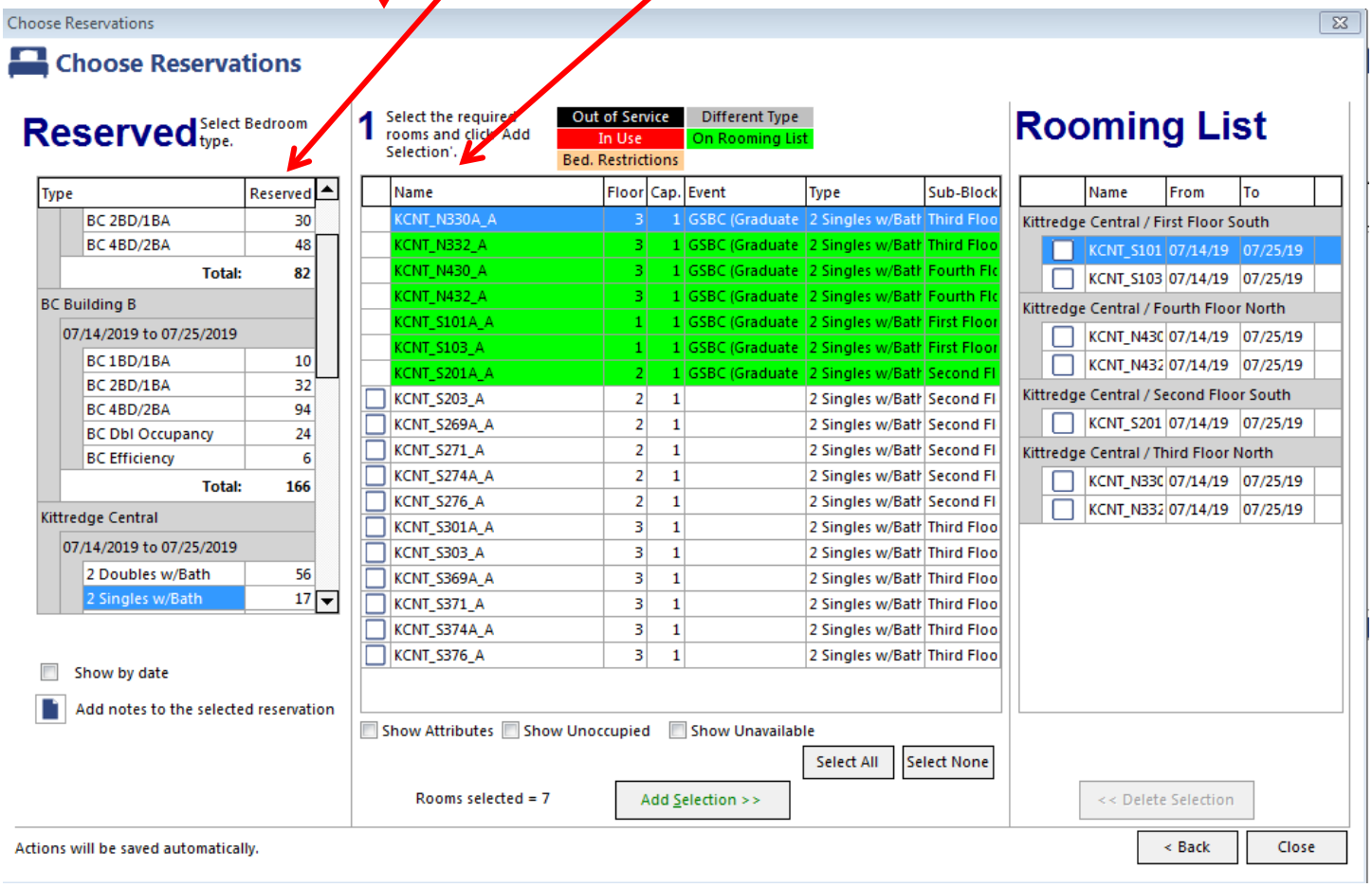
Step 9: A new pop up box will appear. In the "Reserved" box, select the type of room for which you would like to block specific rooms by clicking on the room type

Step 10: In box "1," select the rooms you would like to block for your conference. You can individually select rooms, or click the "Select All" button and Kx will choose the first available rooms for you.

Step 11: Once rooms are selected, click "Add Selection" to block those rooms for your conference.

Step 12: Repeat steps 9-11 for any other room types needed for your conference. You should now see all of your blocked rooms in the "Rooming List" box. You can edit rooms from this box.

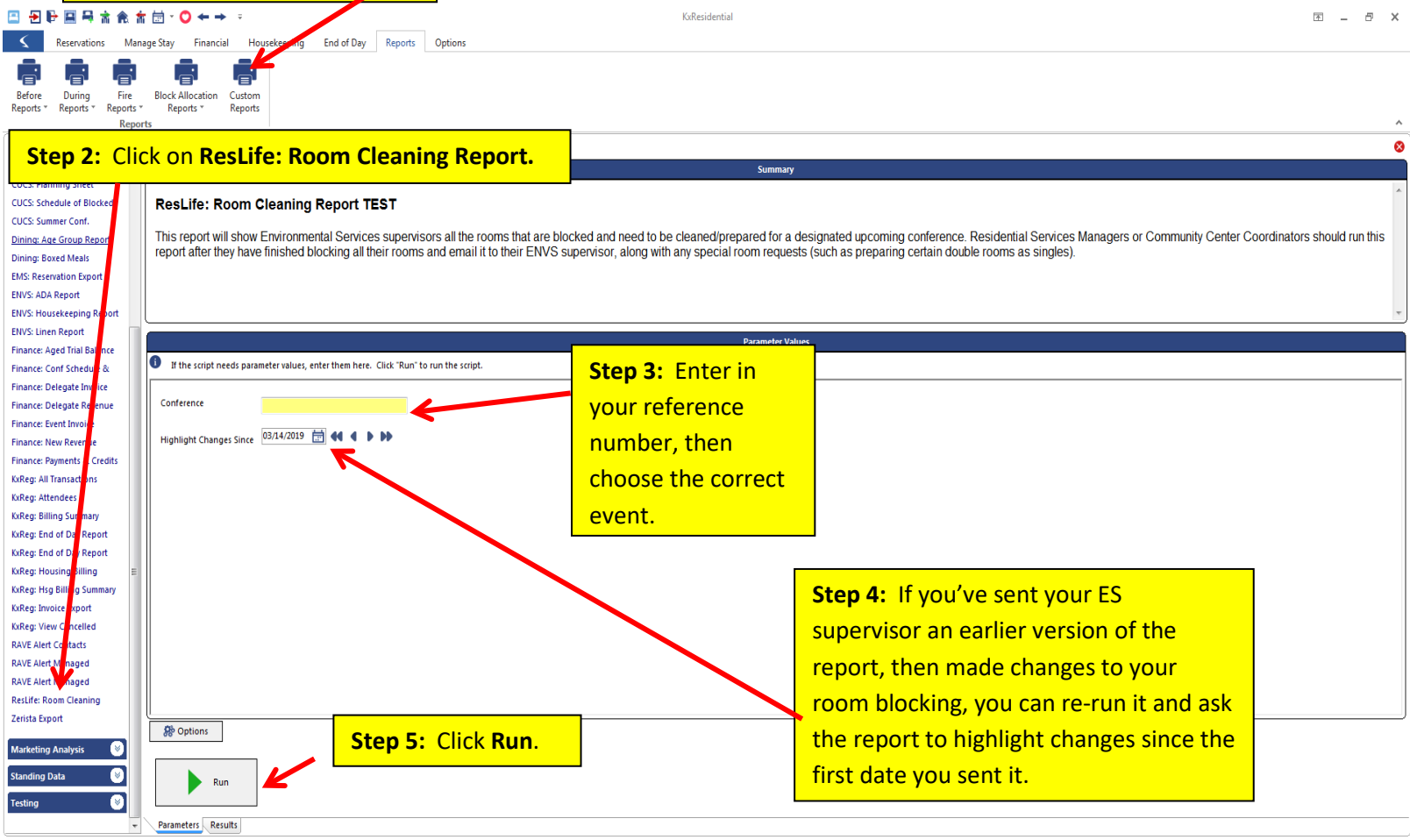
Step 13: When all your rooms have been blocked, click "Close."



EMAIL YOUR ES SUPERVISOR THE ROOM CLEANING REPORT PART I

After your rooms are blocked, you can email the room cleaning report to your ES supervisor. Make sure you have taken any beds offline for using double rooms as singles.

Step 1: Go to the **Reports** tab and click on **Custom Reports**.



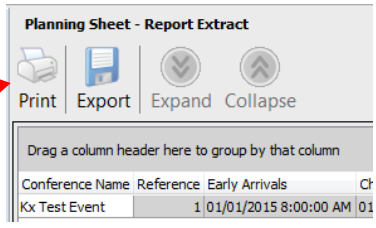
Step 2: Click on **ResLife: Room Cleaning Report.**

Step 3: Enter in your reference number, then choose the correct event.

Step 4: If you've sent your ES supervisor an earlier version of the report, then made changes to your room blocking, you can re-run it and ask the report to highlight changes since the first date you sent it.

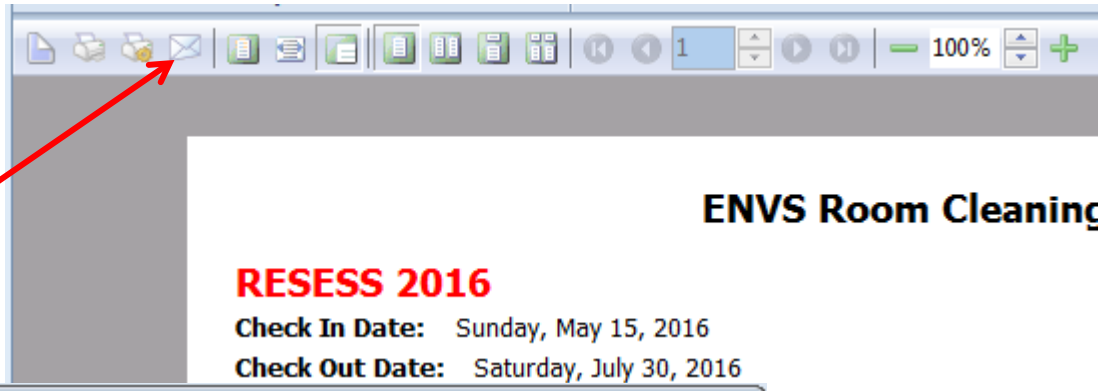
Step 5: Click **Run**.

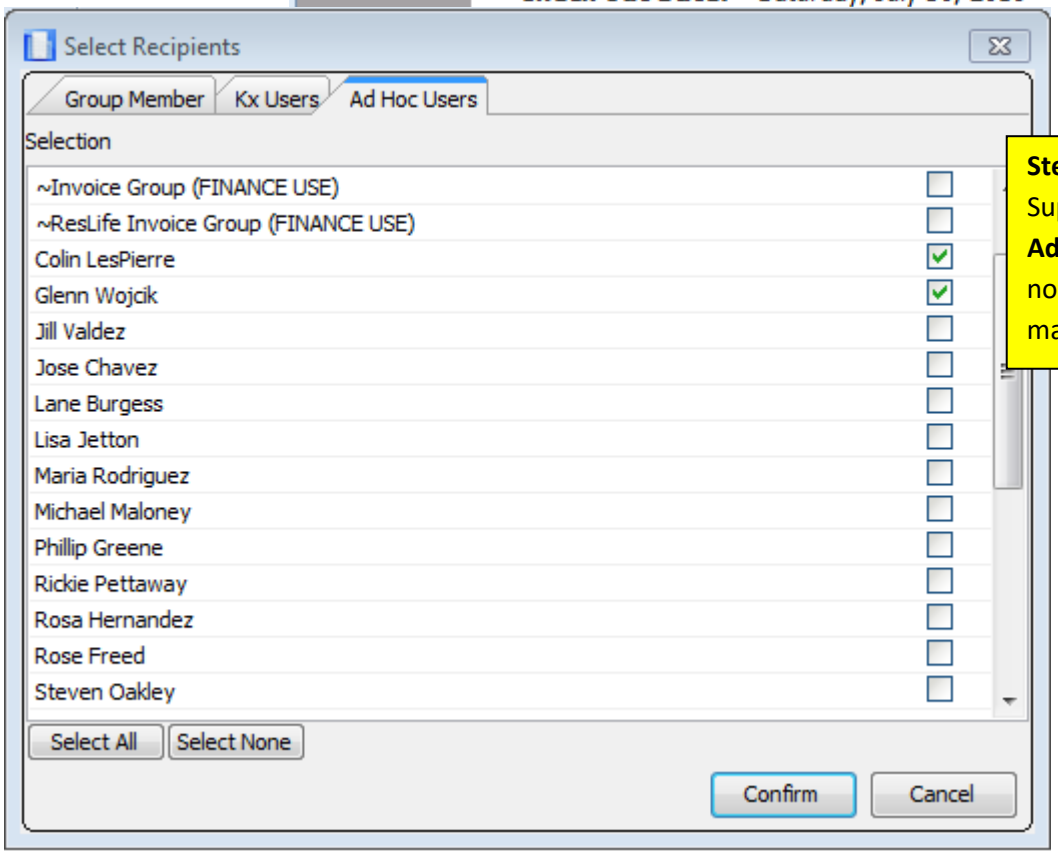
Step 6: On the next screen, click **Print**.



EMAIL YOUR ES SUPERVISOR THE ROOM CLEANING REPORT PART II

Step 7: Select the mail icon to email.





Step 8: Choose your ES Supervisor from the list on the **Ad Hoc Users** tab. If they are not listed, you can enter them manually later.

Step 9: Next, choose **Skip** on the **Select Template for Email Body** screen as you don't need an email template.

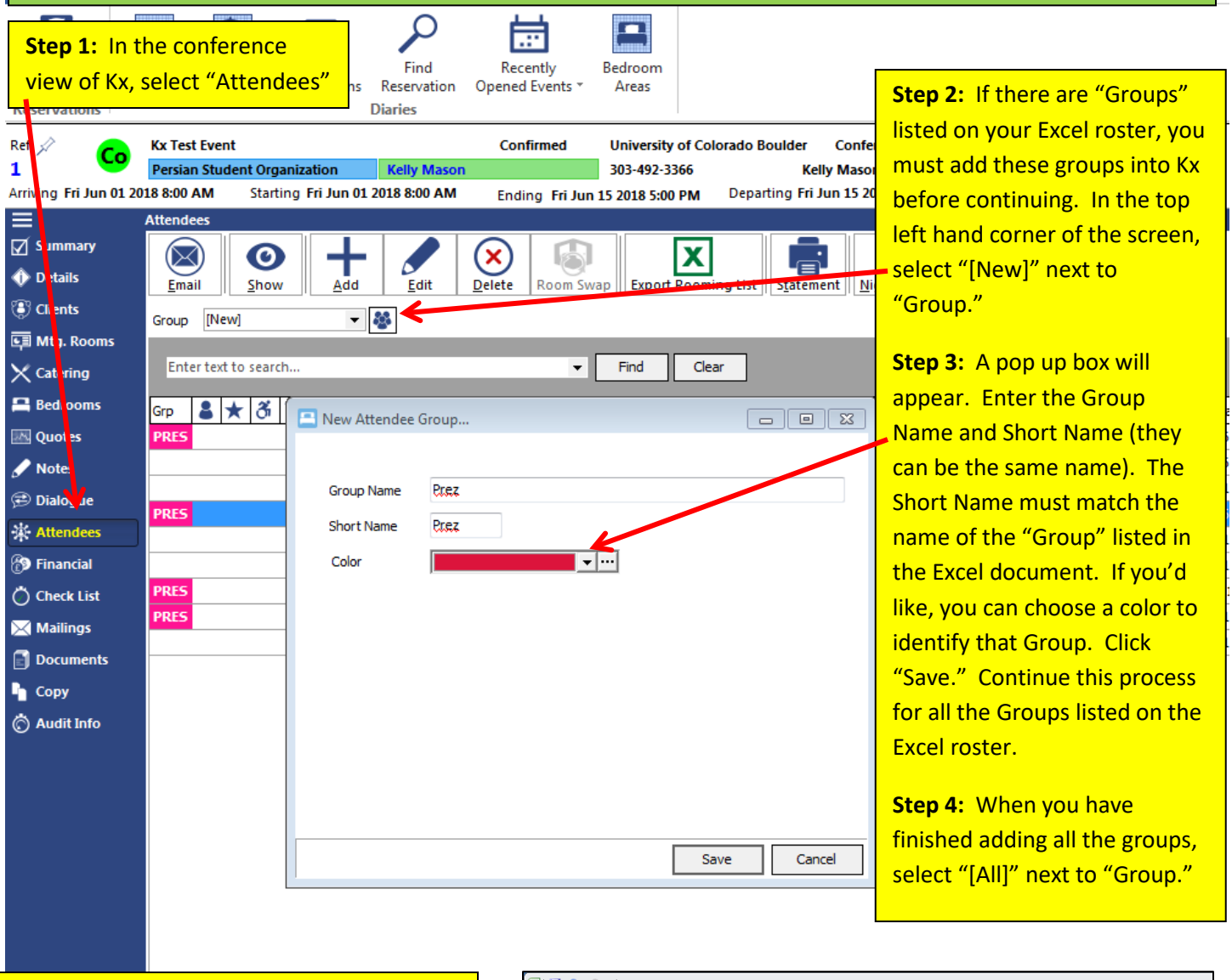
Step 10: If you'd like a read receipt, select **Yes** on the next screen; otherwise choose **No**.

Step 11: A **Send Email** pop up box will appear. Here, you can click **Edit Body** to edit the email, add or delete recipients, and edit the subject. The report is already attached, so when you're ready, click **Send.**

IMPORT A ROSTER PART I

You will receive an Excel roster from your Conference Coordinator via e-mail. This roster will list the attendees, their room type, and other applicable information. Save this document to your desktop.

Step 1: In the conference view of Kx, select "Attendees"



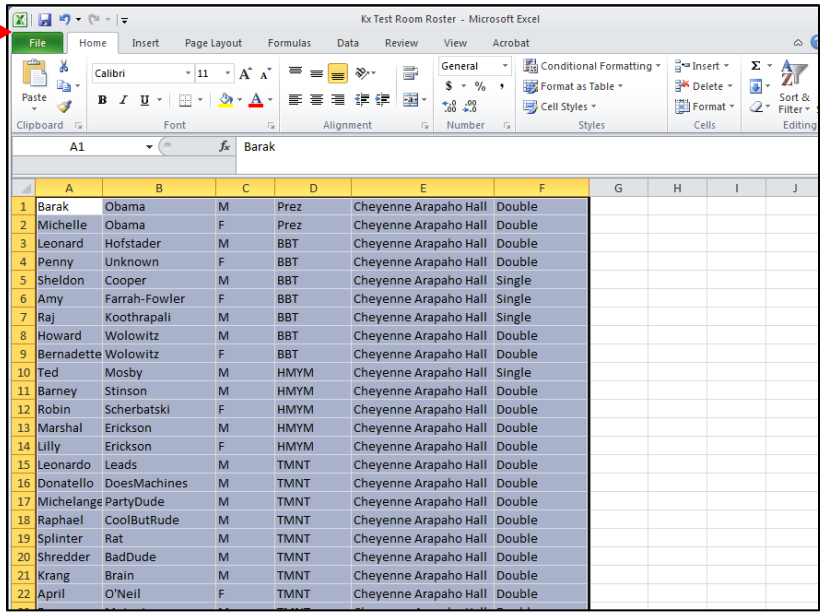
Step 2: If there are "Groups" listed on your Excel roster, you must add these groups into Kx before continuing. In the top left hand corner of the screen, select "[New]" next to "Group."

Step 3: A pop up box will appear. Enter the Group Name and Short Name (they can be the same name). The Short Name must match the name of the "Group" listed in the Excel document. If you'd like, you can choose a color to identify that Group. Click "Save." Continue this process for all the Groups listed on the Excel roster.

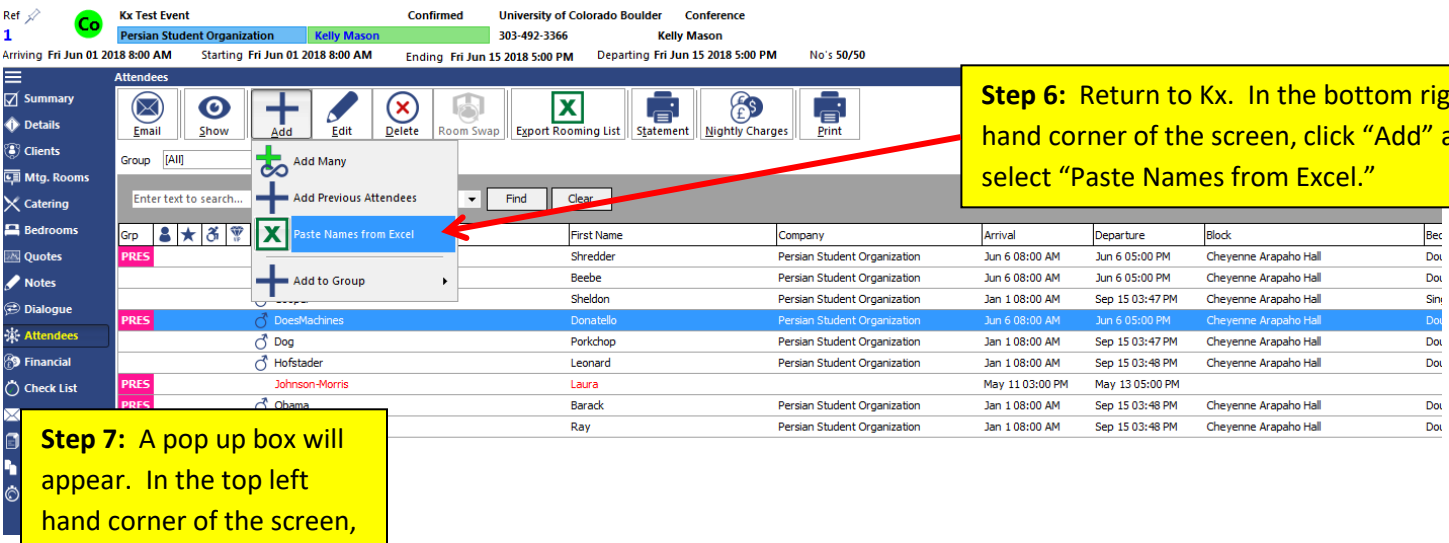
Step 4: When you have finished adding all the groups, select "[All]" next to "Group."

Step 5: Open the roster in Excel.

a. Delete any empty columns.
b. Delete the first row that has the "First Name, Last Name, etc" headers
c. If you are importing bedroom types, make sure that you also have a column called "Block" that lists the residence hall. The spelling of the residence hall must match exactly with what is in Kx. (If you want to see how your hall is listed in Kx, go back to the "Bedrooms" section of Kx where you reserved your rooms, and the screen there will show you how the hall is saved in Kx.
d. Highlight all the fields and click "Copy" or "Ctrl+C" ("Command + C" on a Mac).

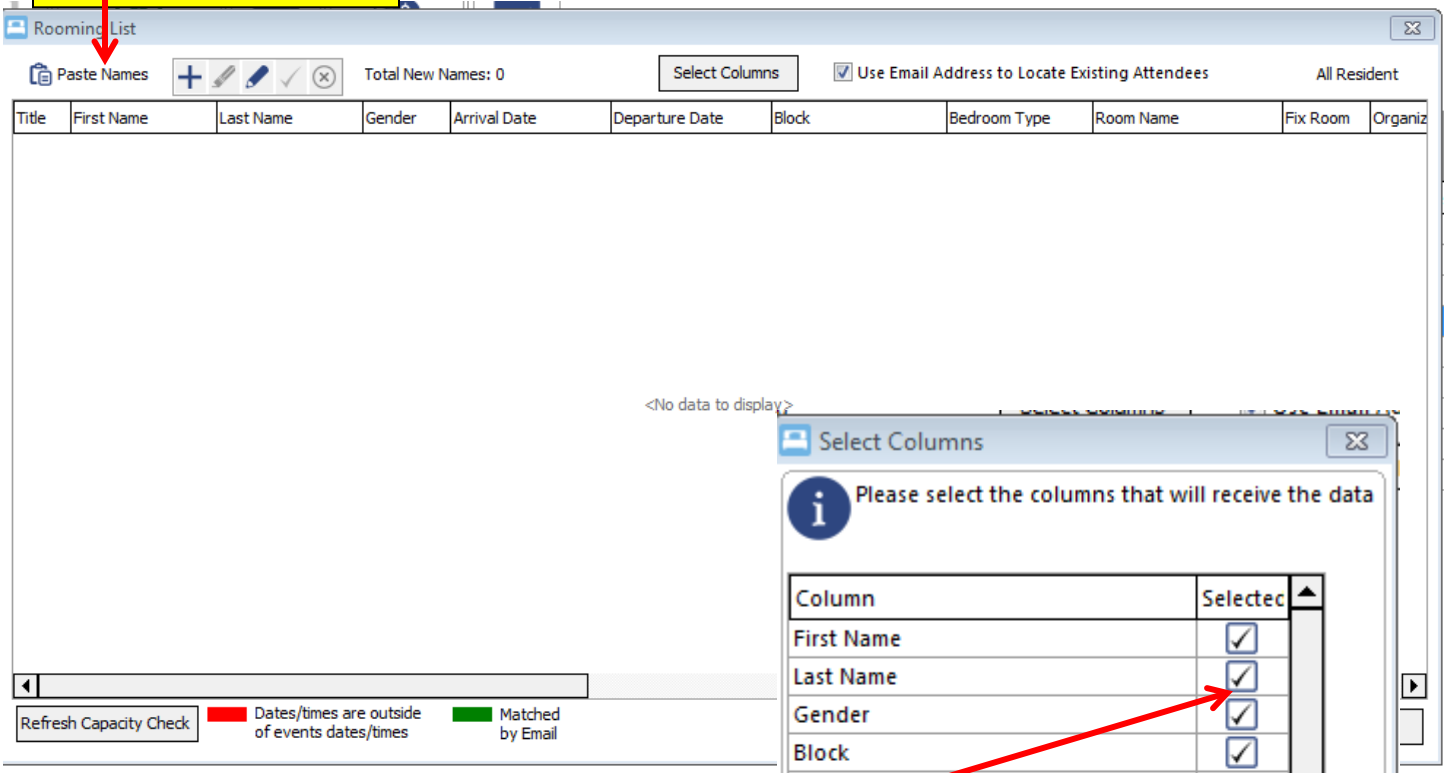


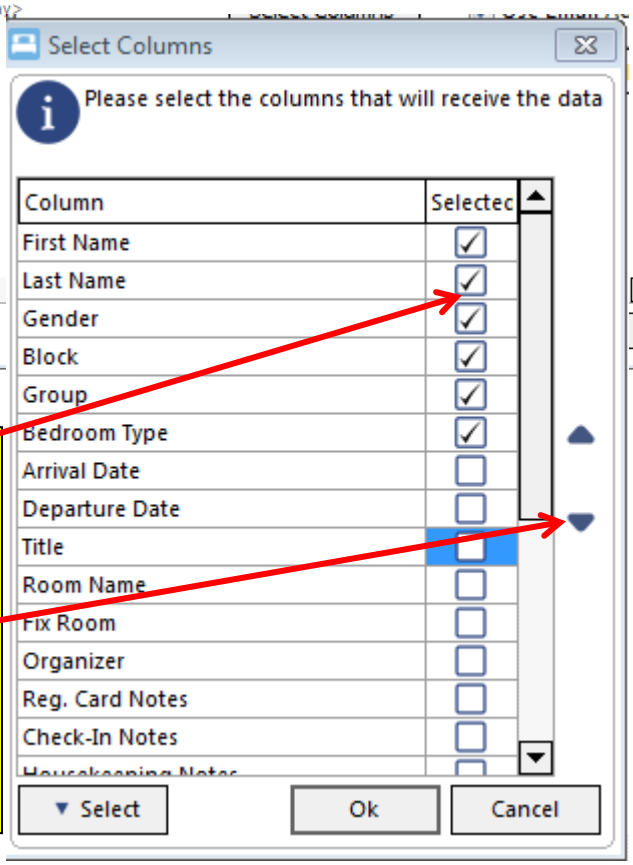
IMPORT A ROSTER PART II



Step 6: Return to Kx. In the bottom right hand corner of the screen, click "Add" and select "Paste Names from Excel."

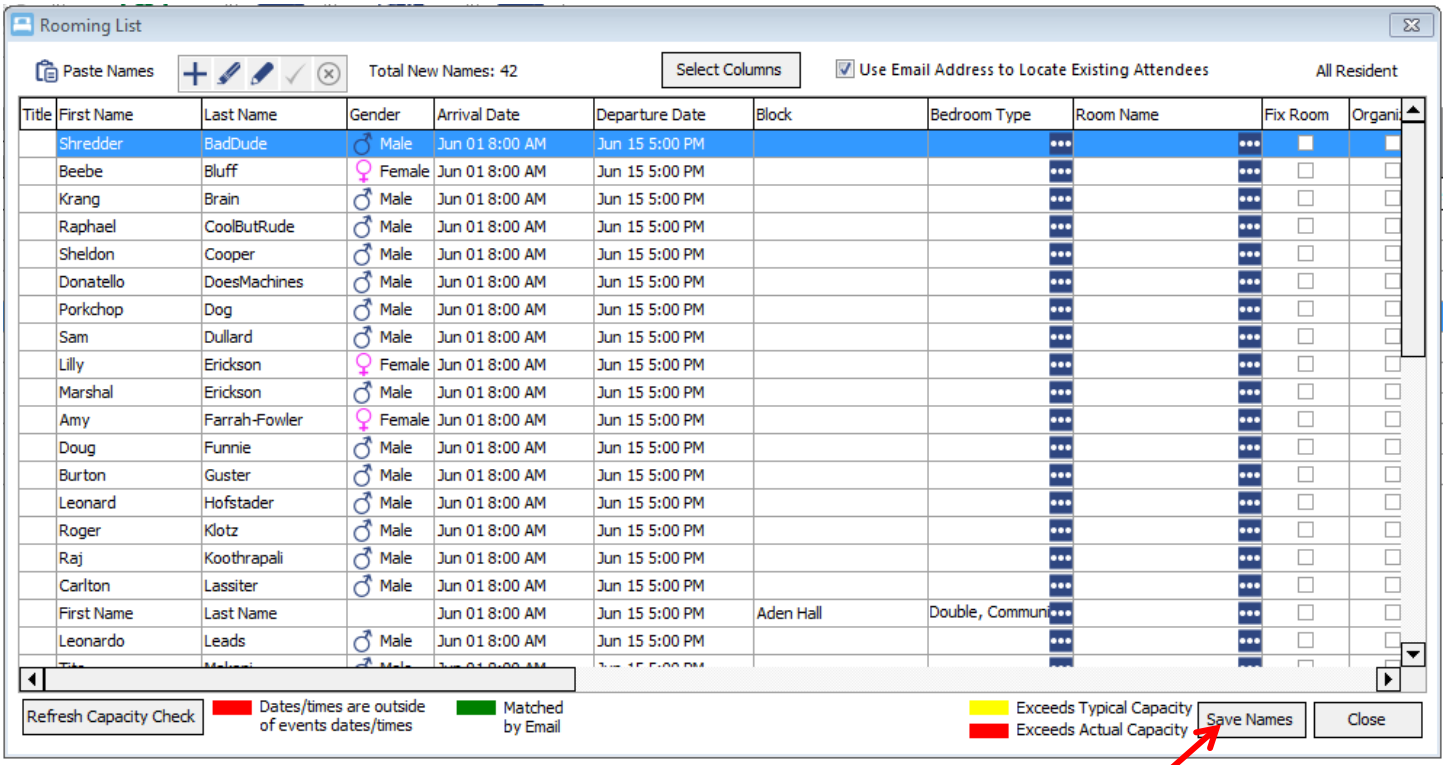
Step 7: A pop up box will appear. In the top left hand corner of the screen, click "Paste Names."





Step 8: Another pop up box will appear. Select all the columns listed in your Excel roster. You will need to re-order them in Kx so that they match the order in your roster (otherwise the information will not import successfully). Use the "up" and "down" arrow buttons on the right hand side of the pop-up box to rearrange the selected boxes in the correct order. Once you have selected the exact number of columns and ordered them in the correct order, you will be able to click "Ok."

IMPORT A ROSTER PART III



Title	First Name	Last Name	Gender	Arrival Date	Departure Date	Block	Bedroom Type	Room Name	Fix Room	Organi
	Shredder	BadDude	Male	Jun 01 8:00 AM	Jun 15 5:00 PM					
	Beebe	Bluff	Female	Jun 01 8:00 AM	Jun 15 5:00 PM					
	Krang	Brain	Male	Jun 01 8:00 AM	Jun 15 5:00 PM					
	Raphael	CoolButRude	Male	Jun 01 8:00 AM	Jun 15 5:00 PM					
	Sheldon	Cooper	Male	Jun 01 8:00 AM	Jun 15 5:00 PM					
	Donatello	DoesMachines	Male	Jun 01 8:00 AM	Jun 15 5:00 PM					
	Porkchop	Dog	Male	Jun 01 8:00 AM	Jun 15 5:00 PM					
	Sam	Dullard	Male	Jun 01 8:00 AM	Jun 15 5:00 PM					
	Lilly	Erickson	Female	Jun 01 8:00 AM	Jun 15 5:00 PM					
	Marshal	Erickson	Male	Jun 01 8:00 AM	Jun 15 5:00 PM					
	Amy	Farrah-Fowler	Female	Jun 01 8:00 AM	Jun 15 5:00 PM					
	Doug	Funnie	Male	Jun 01 8:00 AM	Jun 15 5:00 PM					
	Burton	Guster	Male	Jun 01 8:00 AM	Jun 15 5:00 PM					
	Leonard	Hofstader	Male	Jun 01 8:00 AM	Jun 15 5:00 PM					
	Roger	Klotz	Male	Jun 01 8:00 AM	Jun 15 5:00 PM					
	Raj	Koothrapali	Male	Jun 01 8:00 AM	Jun 15 5:00 PM					
	Carlton	Lassiter	Male	Jun 01 8:00 AM	Jun 15 5:00 PM					
	First Name	Last Name		Jun 01 8:00 AM	Jun 15 5:00 PM	Aden Hall	Double, Commun			
	Leonardo	Leads	Male	Jun 01 8:00 AM	Jun 15 5:00 PM					

Step 9: Your names will now appear in the "Rooming List" pop up box. Click "Save Names."

Step 10: Another pop up box will appear that says "OK to save the imported attendees?" Click "Yes."

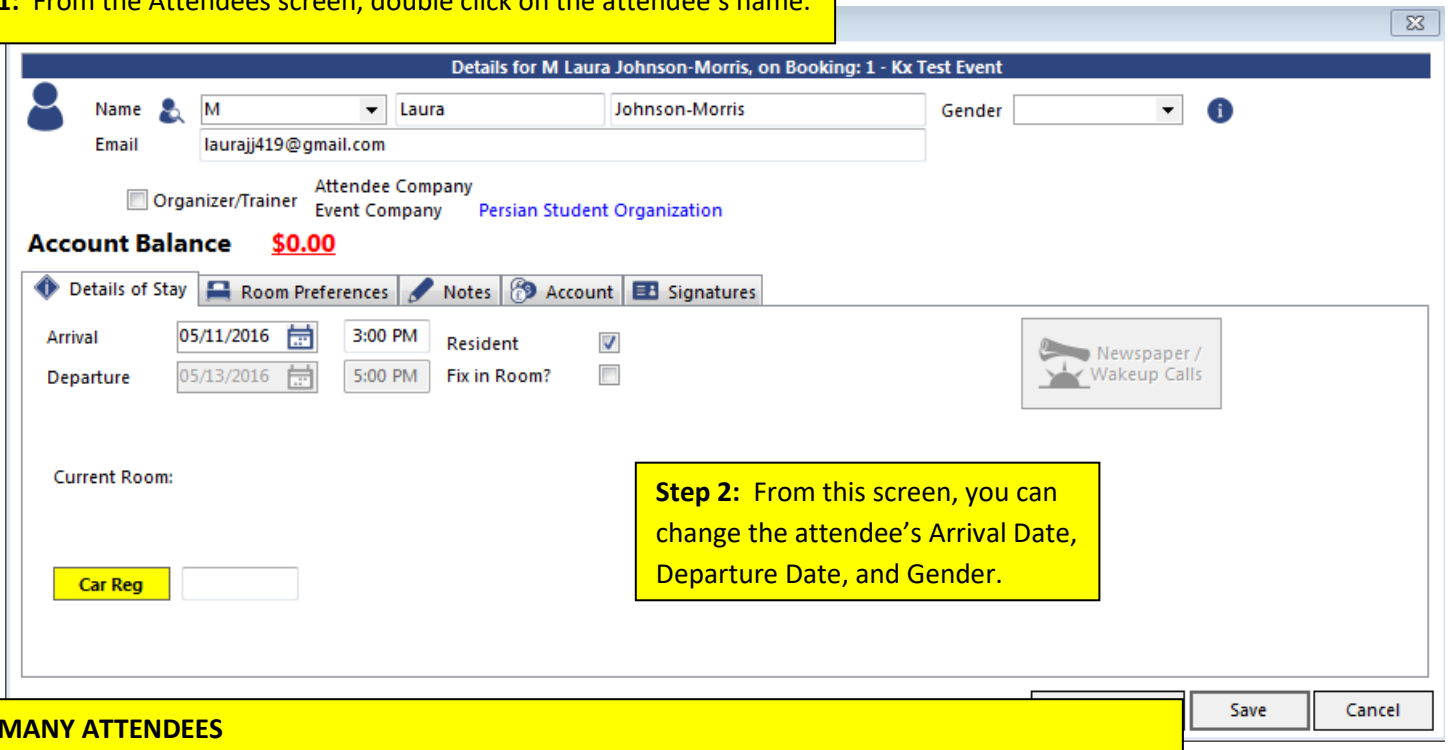
NOTE: You may get a Warning box that says, "There are discrepancies between allocations and reservations for this event. Would you like to check them now?" Click "No."

CHANGE ARRIVAL/DEPARTURE DATES & OTHER ATTENDEE DETAILS

For some conferences, the roster will already be imported into Kx because that conference used online registration to sign up for housing. If this is the case, you will need to double check the roster against the rooming list that the Conference Coordinator sends you to ensure that the gender, arrival dates, and departure dates are correct. If they are not correct, you will need to modify them.

EDIT ONE ATTENDEE

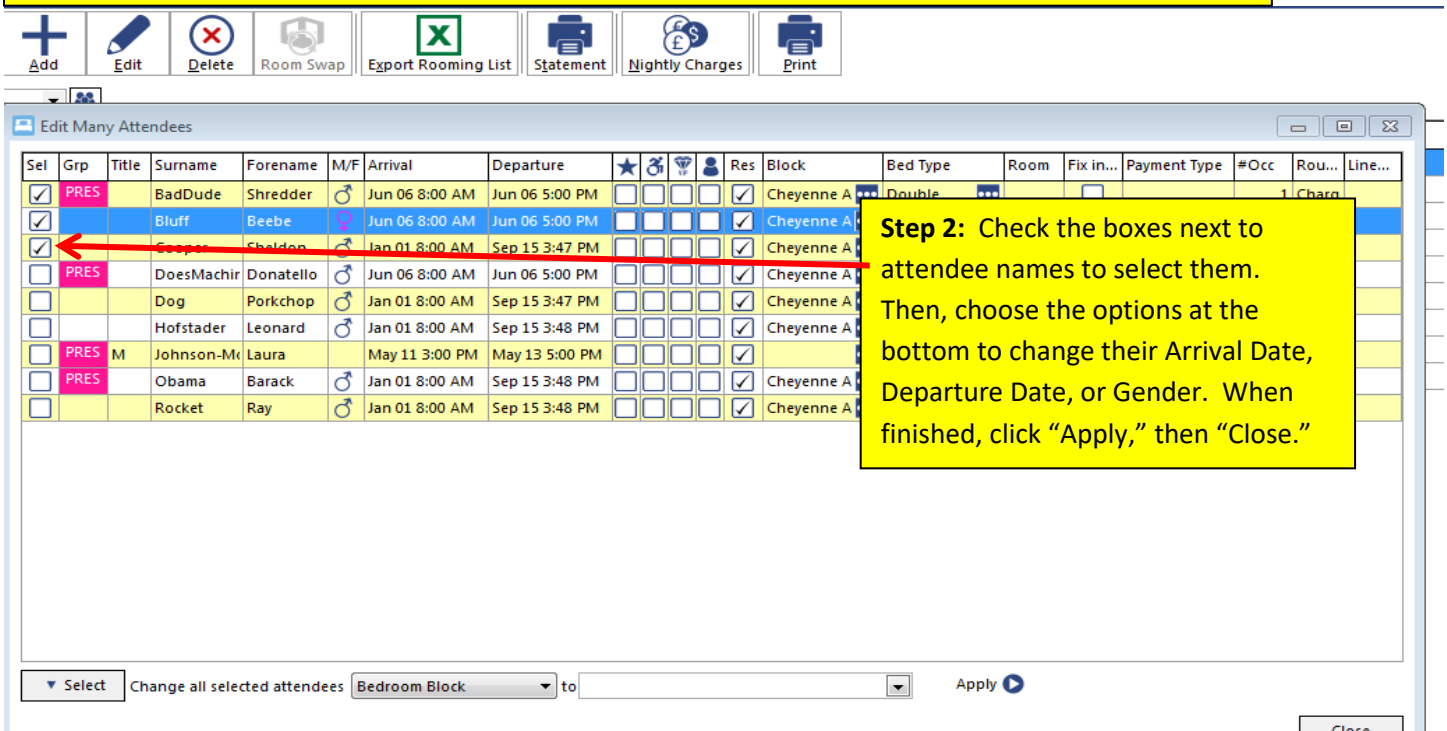
Step 1: From the Attendees screen, double click on the attendee's name.



Step 2: From this screen, you can change the attendee's Arrival Date, Departure Date, and Gender.

EDIT MANY ATTENDEES

Step 1: From the Attendees screen, click on "Edit" at the bottom of the screen and select "Edit Many."

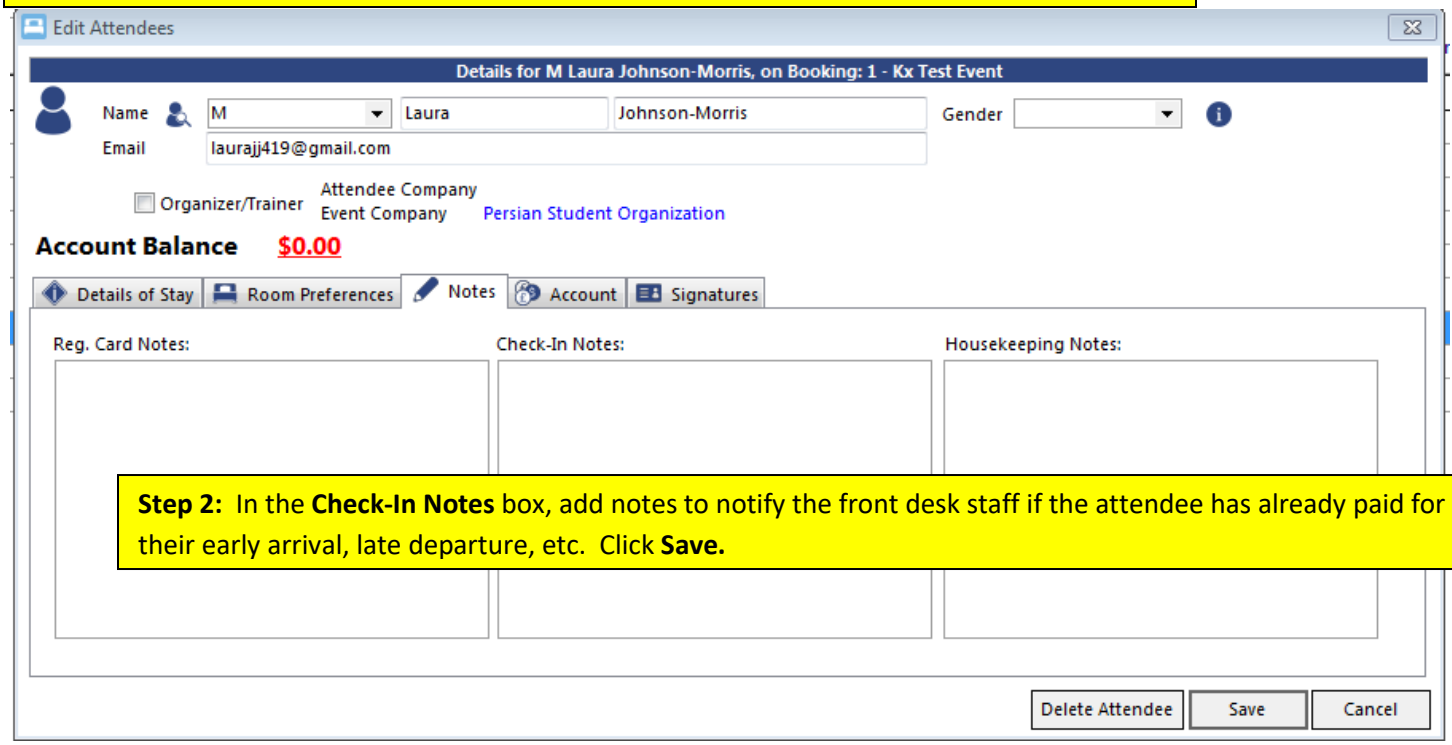


Step 2: Check the boxes next to attendee names to select them. Then, choose the options at the bottom to change their Arrival Date, Departure Date, or Gender. When finished, click "Apply," then "Close."

ADD ATTENDEE CHECK-IN NOTES

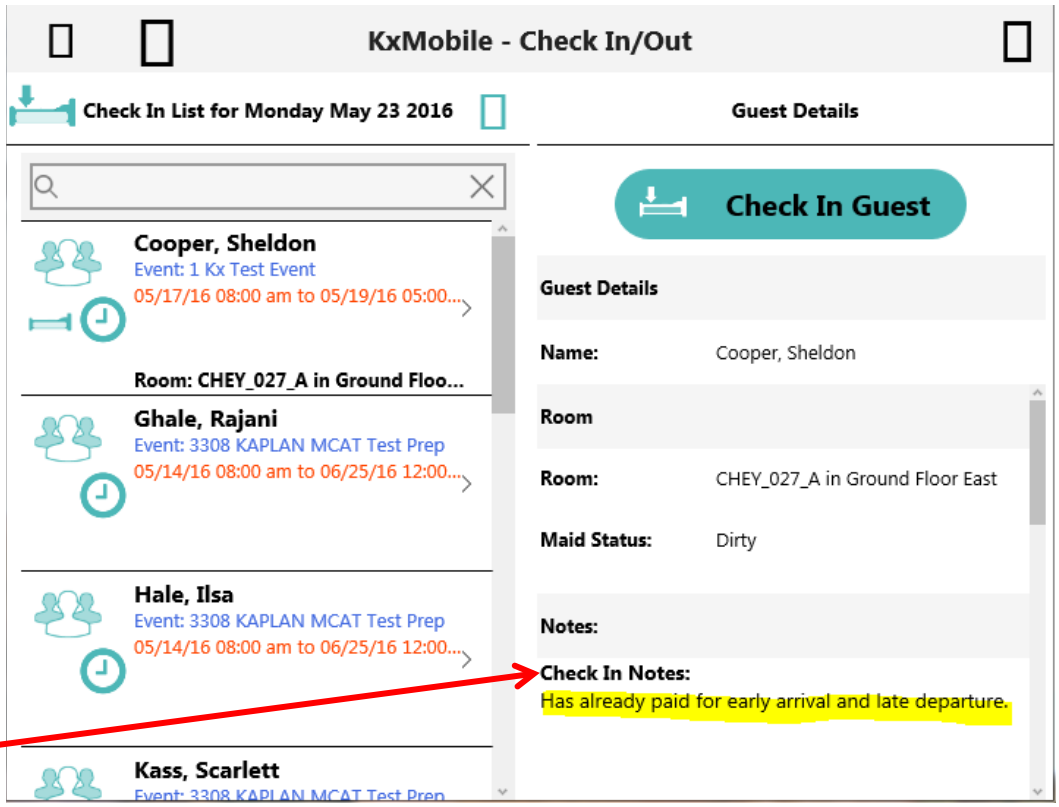
For conferences with online registration, it's possible that some of the attendees already paid for their early arrival or late departure in advance. If this is the case (talk to your conference coordinator to be sure), then you will need to put notes on their account so that they don't get charged for an early arrival or late departure at the front desk.

Step 1: From the Attendees screen, double click on the attendee's name. Select the **Notes** tab.



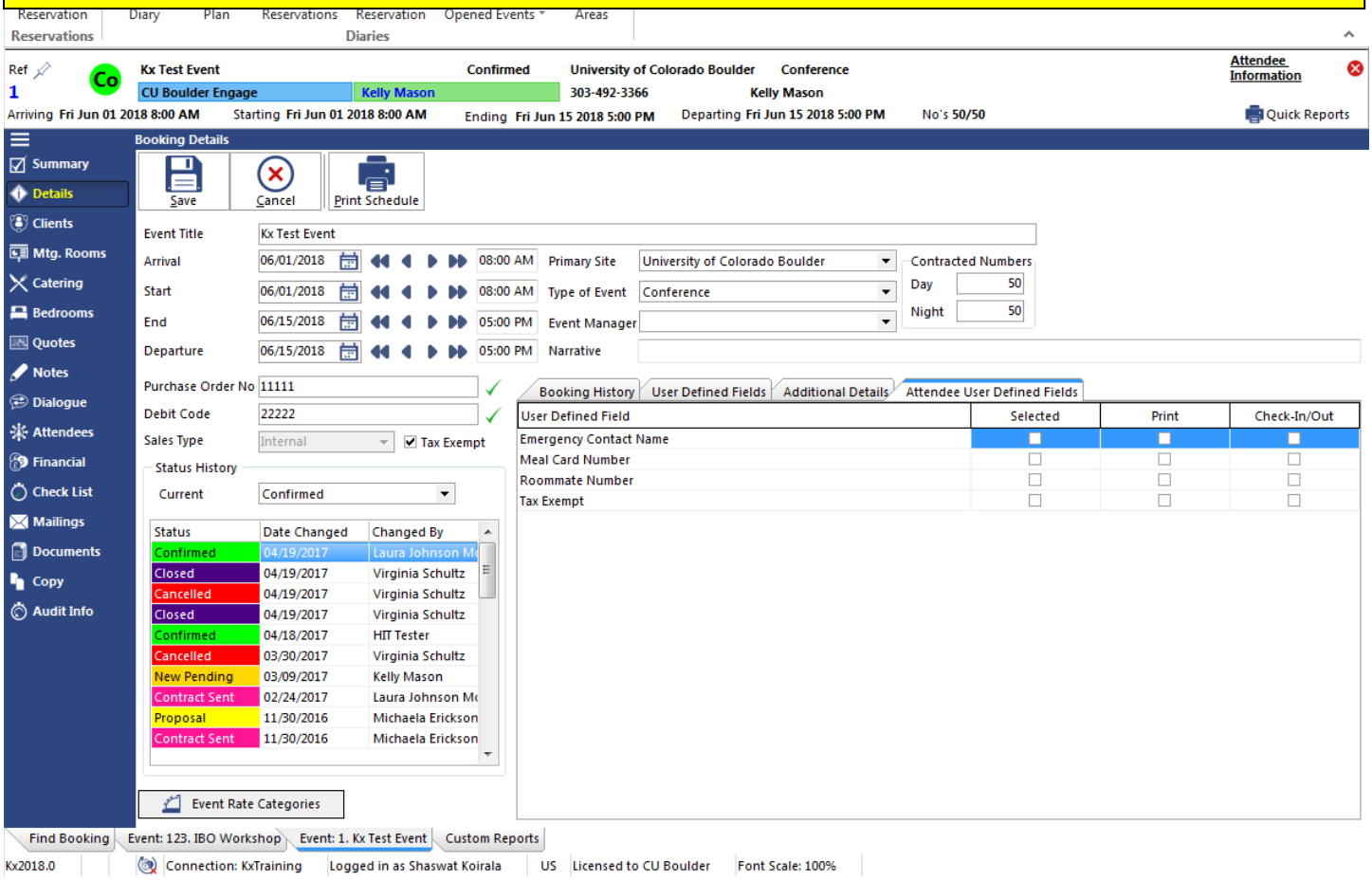
Step 2: In the **Check-In Notes** box, add notes to notify the front desk staff if the attendee has already paid for their early arrival, late departure, etc. Click **Save.**

These notes will show up on KxMobile when the attendee checks in so that the front desk staff knows that they don't need to collect payment.

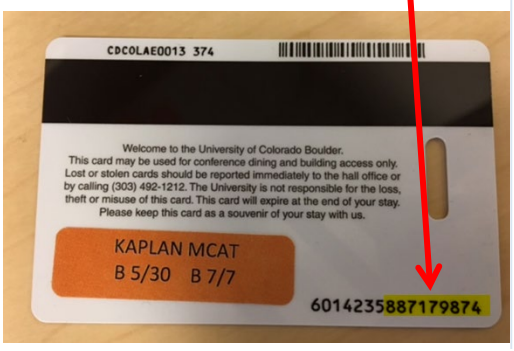


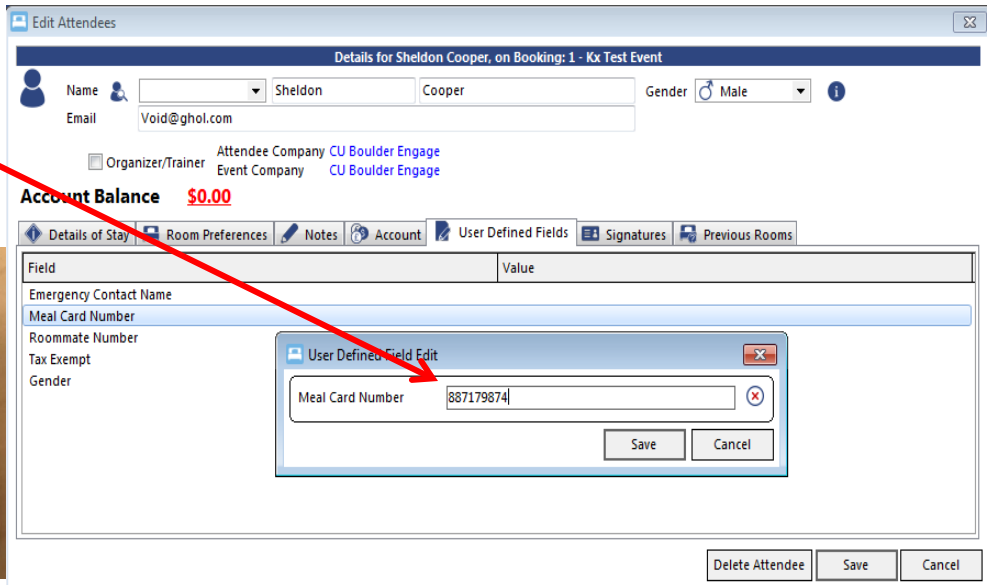
ADD MEAL CARD NUMBER

Step 1: Once all the attendees are added, add the meal card number to each attendee's record in Kx. First, click on the "Details" tab of the event, and choose "Attendee User Defined Fields." Check all three boxes next to "Meal Card Number" and click "Save."



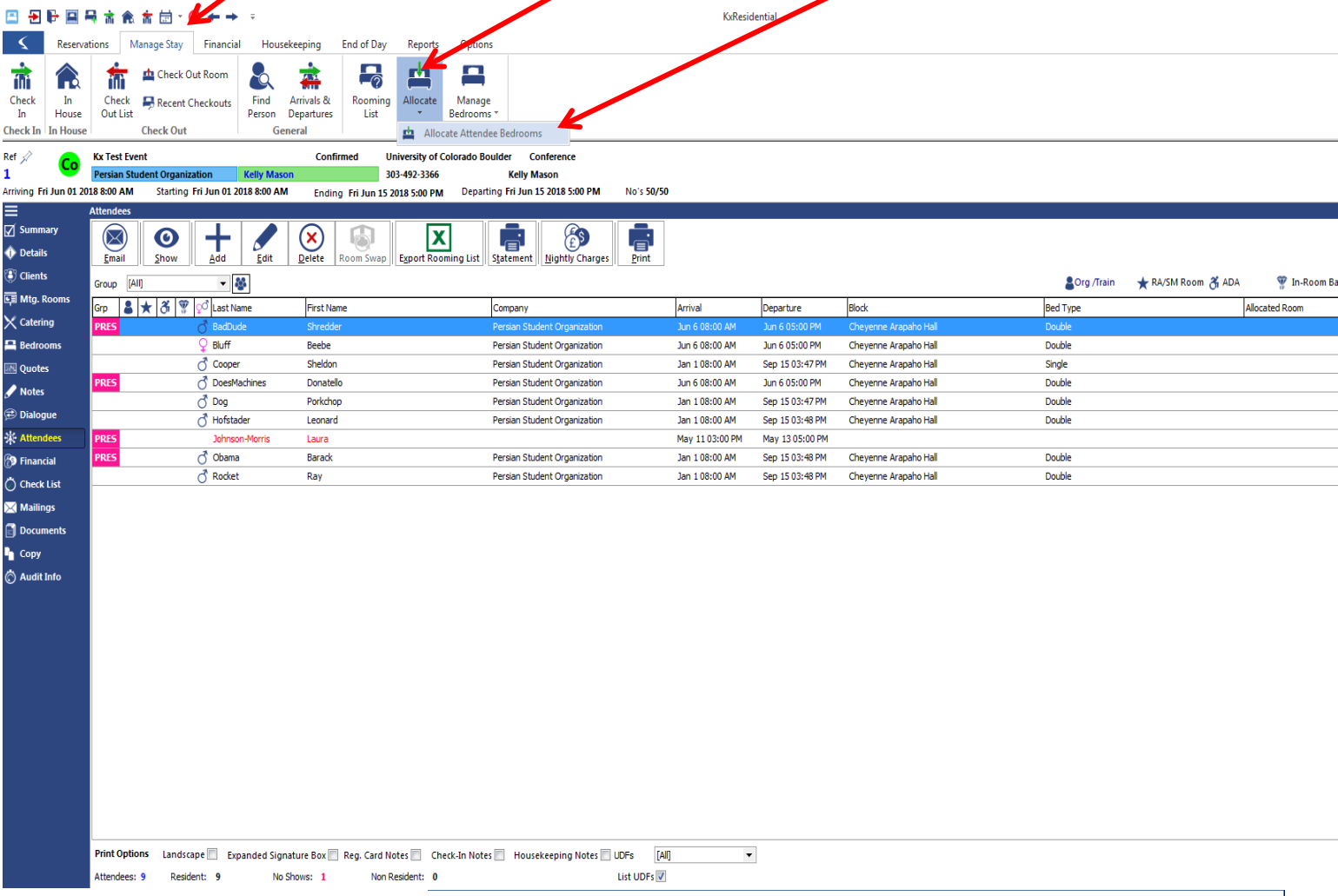
Step 2: On the "Attendees" tab, double click on an individual attendee. Choose the "User Defined Fields" tab. Double click on "Meal Card Number" to edit the field. Enter the last 9 digits of the "Meal Card Number" from their keycard. Click "Save."



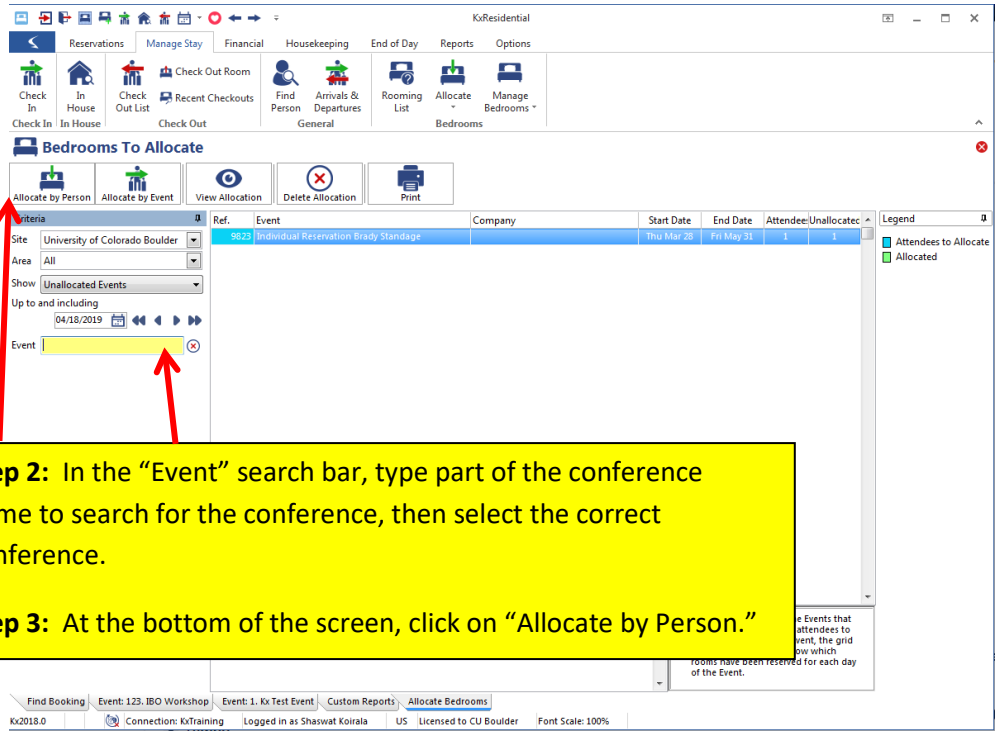


ASSIGN ROOMS PART I

Step 1: In the "Manage Stay" toolbar, click on "Allocate" and select "Allocate Attendee Bedrooms."



NOTE: If your event is single gendered, you may instead choose to "Allocate by Event," but allocating by event does not allow you to designate the placement of different genders, which may be an issue if you have wings of your buildings that are single gendered.

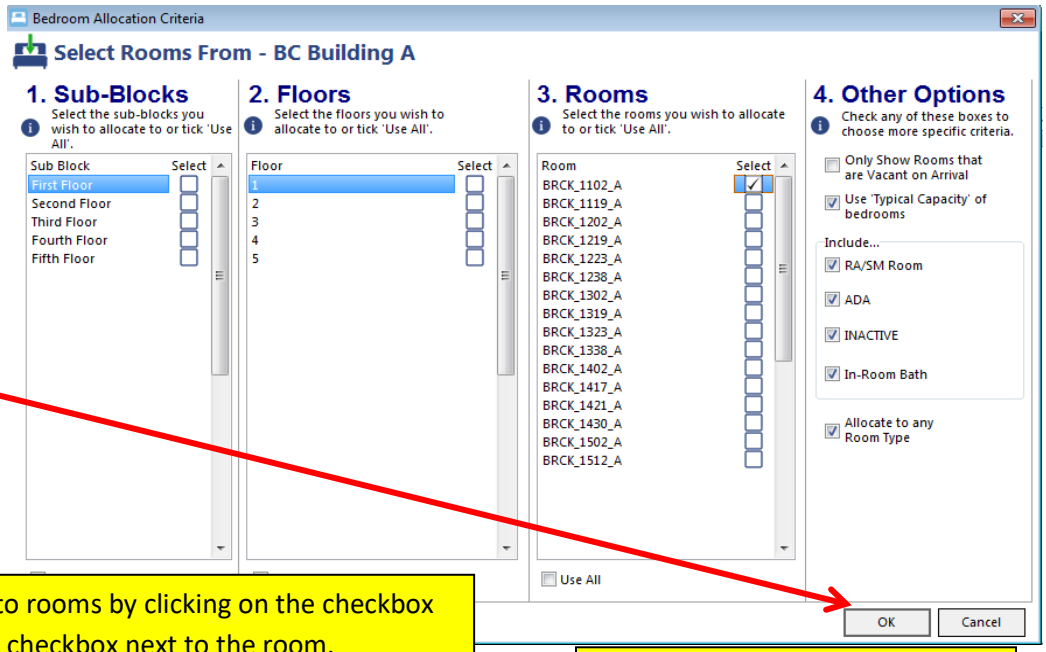


Step 2: In the "Event" search bar, type part of the conference name to search for the conference, then select the correct conference.

Step 3: At the bottom of the screen, click on "Allocate by Person."

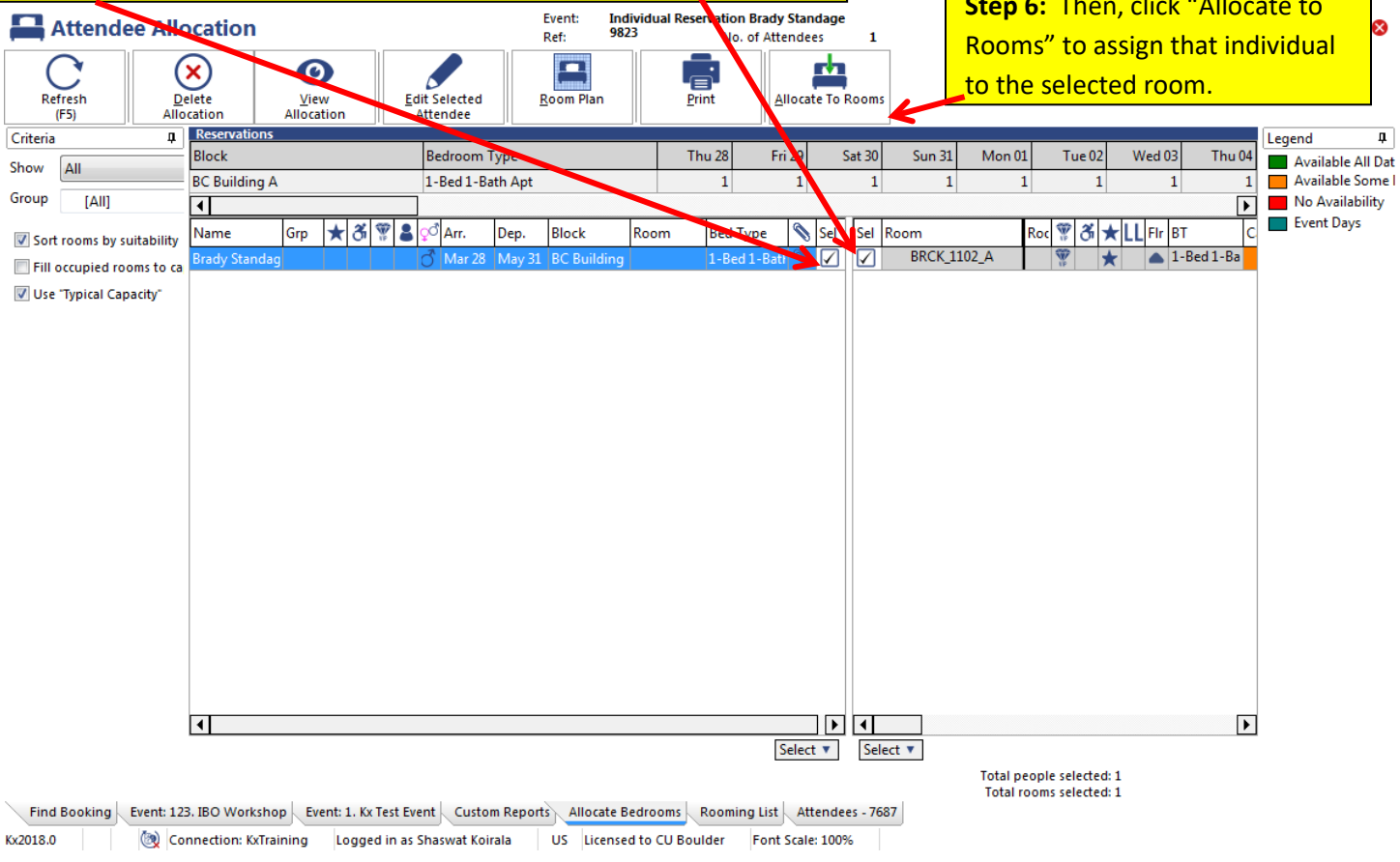
ASSIGN ROOMS PART II

Step 4: A pop up box will appear. At this point, select the rooms that you wish to assign. The default selection is "all rooms" in your block. If you are assigning all rooms for the conference at this time, then click "OK."



Step 5: You can now assign individuals to rooms by clicking on the checkbox next to the attendee and clicking on the checkbox next to the room.

Step 6: Then, click "Allocate to Rooms" to assign that individual to the selected room.



NOTE: You can allocate multiple people at once by selecting several people and their corresponding rooms. If the attendees have requested certain roommates, you may want to assign both roommates at once to their room.

Step 7: When you have finished assigning all the attendees to rooms, click "Close."

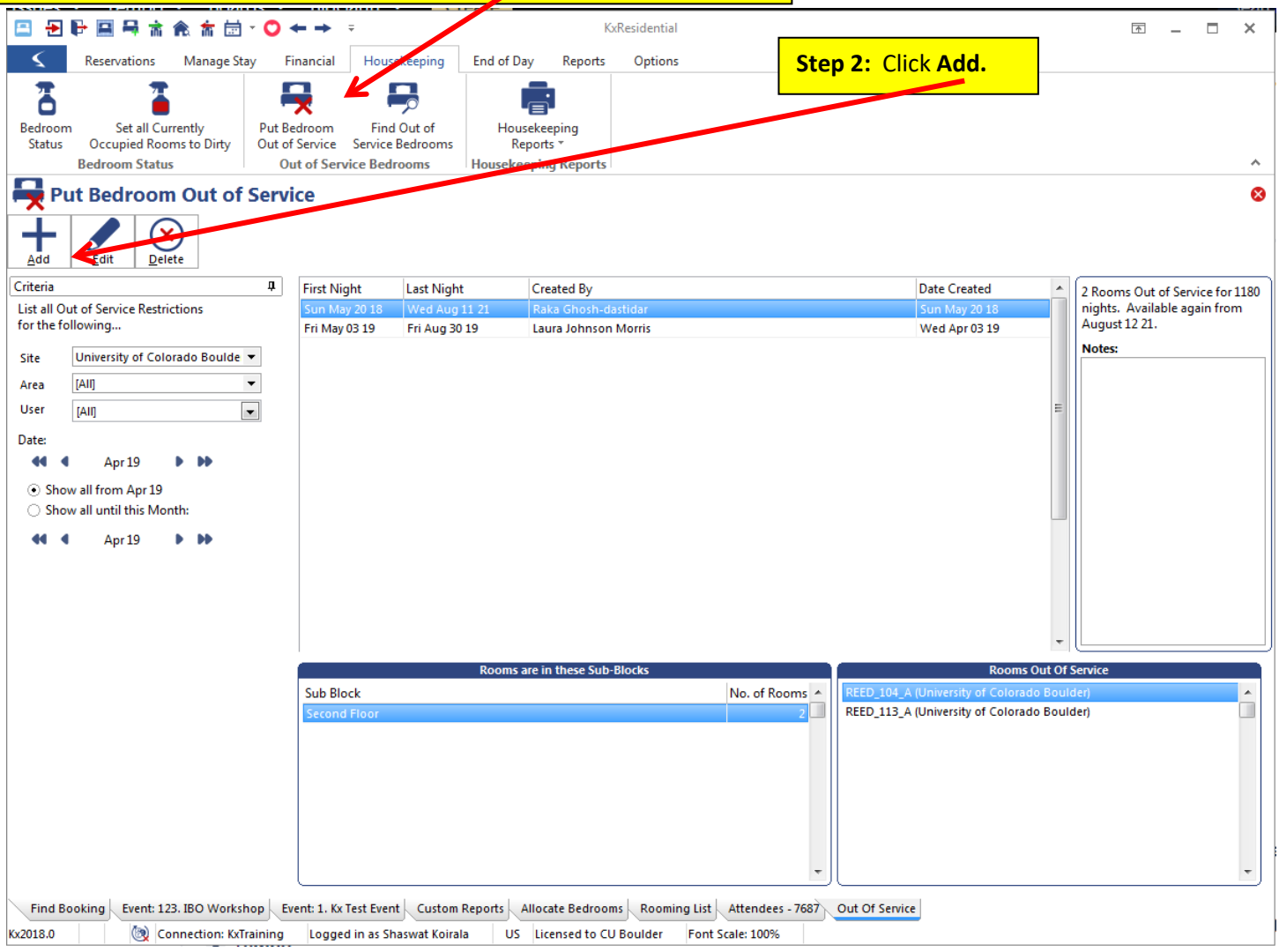
USE A DOUBLE AS A SINGLE/PUT A ROOM OUT OF SERVICE PART I

You may need to use a double room as a single because your building does not have enough singles for the conference. To do this, you will **block bed A for an attendee** and **put bed B "out of service"**. This ensures that no one accidentally puts someone in that out of service room, and it helps with our bed night reporting at the end of the summer.

To Put a Bed (or Full Room) Out of Service:

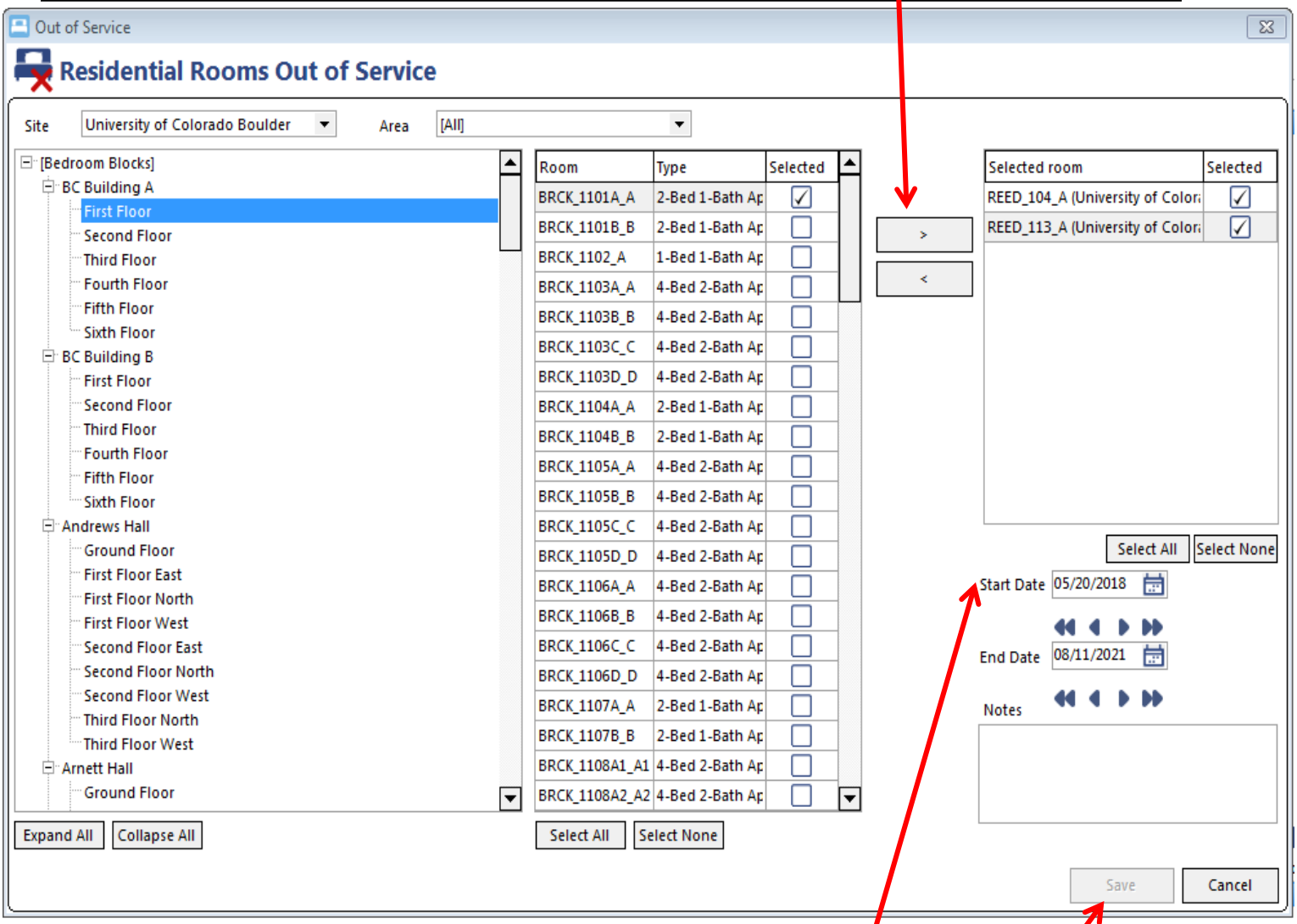
Step 1: On the **Housekeeping Tab**, select **Put Bedroom Out of Service**

Step 2: Click **Add.**



USE A DOUBLE AS A SINGLE/PUT A ROOM OUT OF SERVICE PART II

Step 3: A pop up box will appear. Select the Block, Sub-Block, Room, and click the **>** arrow to add to the list.



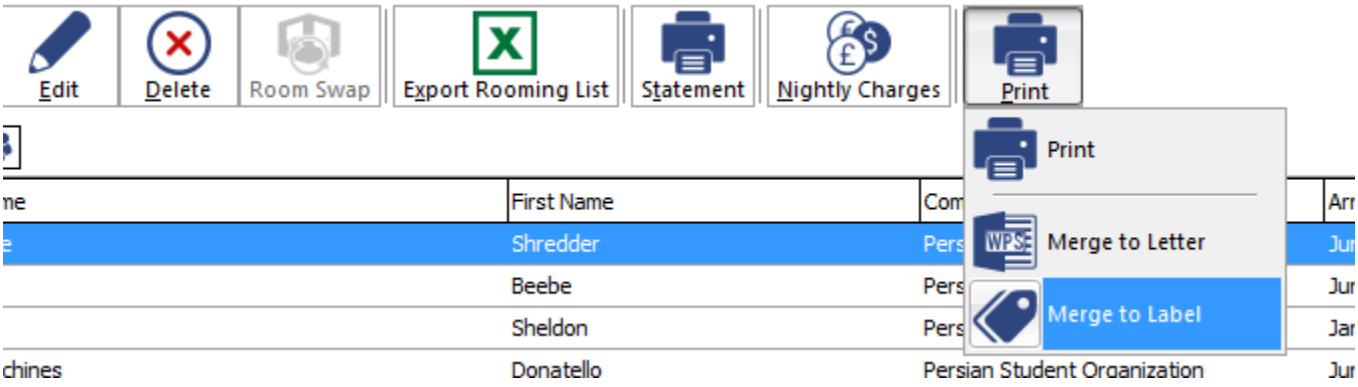
Step 4: Put in the correct start and end dates for the room to be offline.

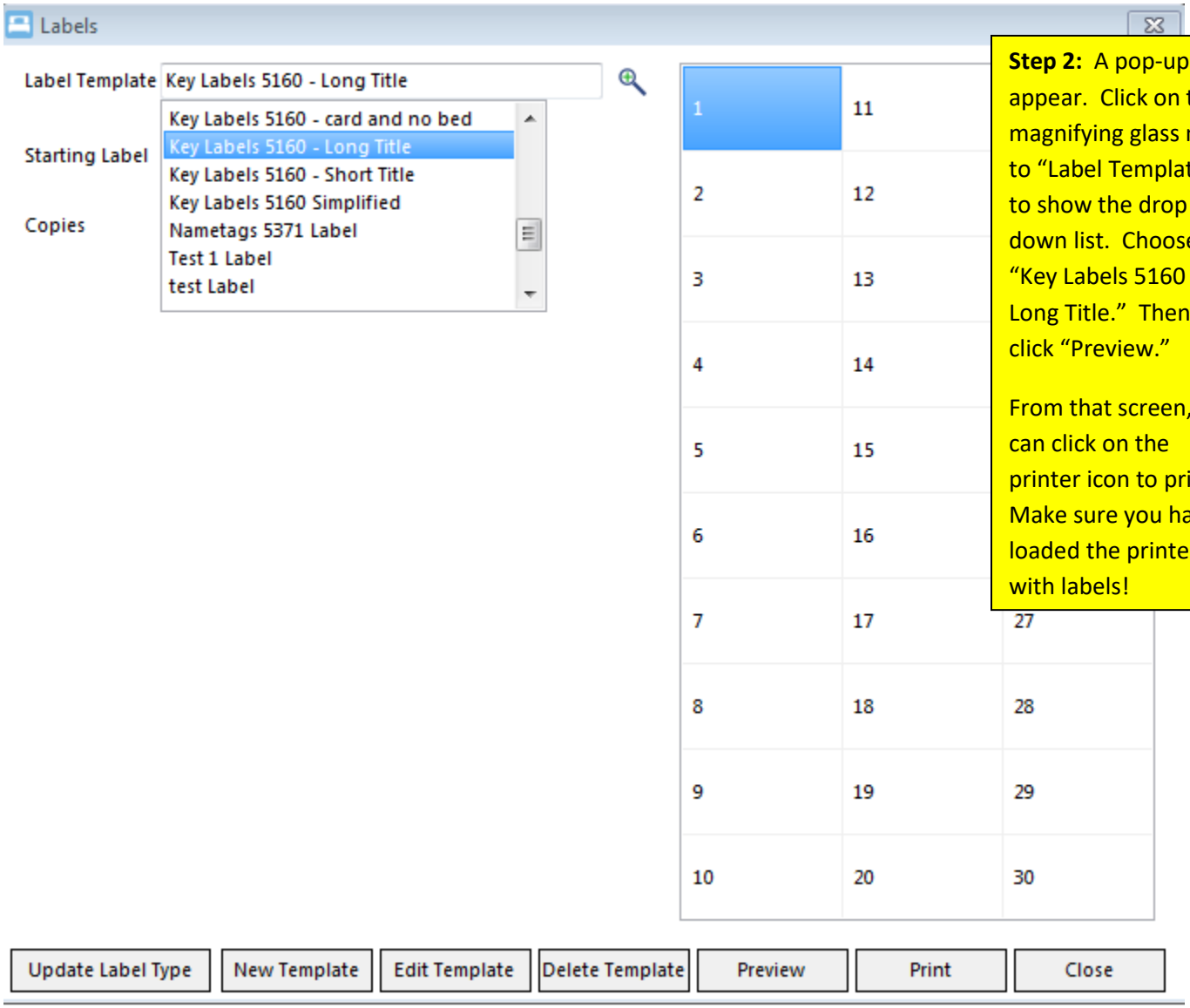
Then, add notes explaining why the room or bed is offline.

Click **Save.**

PRINT KEYCARD LABELS

Step 1: From the Attendees screen, select "Print" and click "Merge to Label" in the bottom right corner.

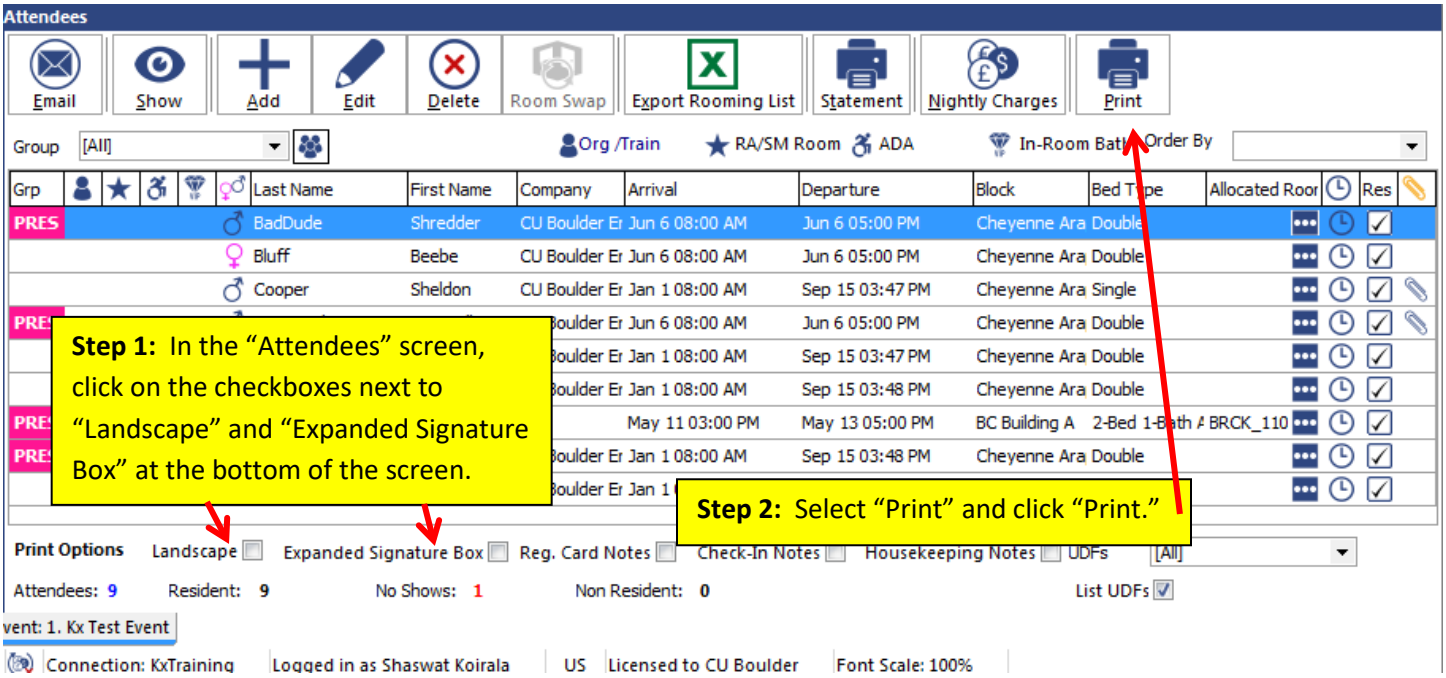




Step 2: A pop-up will appear. Click on the magnifying glass next to "Label Template" to show the drop down list. Choose "Key Labels 5160 – Long Title." Then, click "Preview."

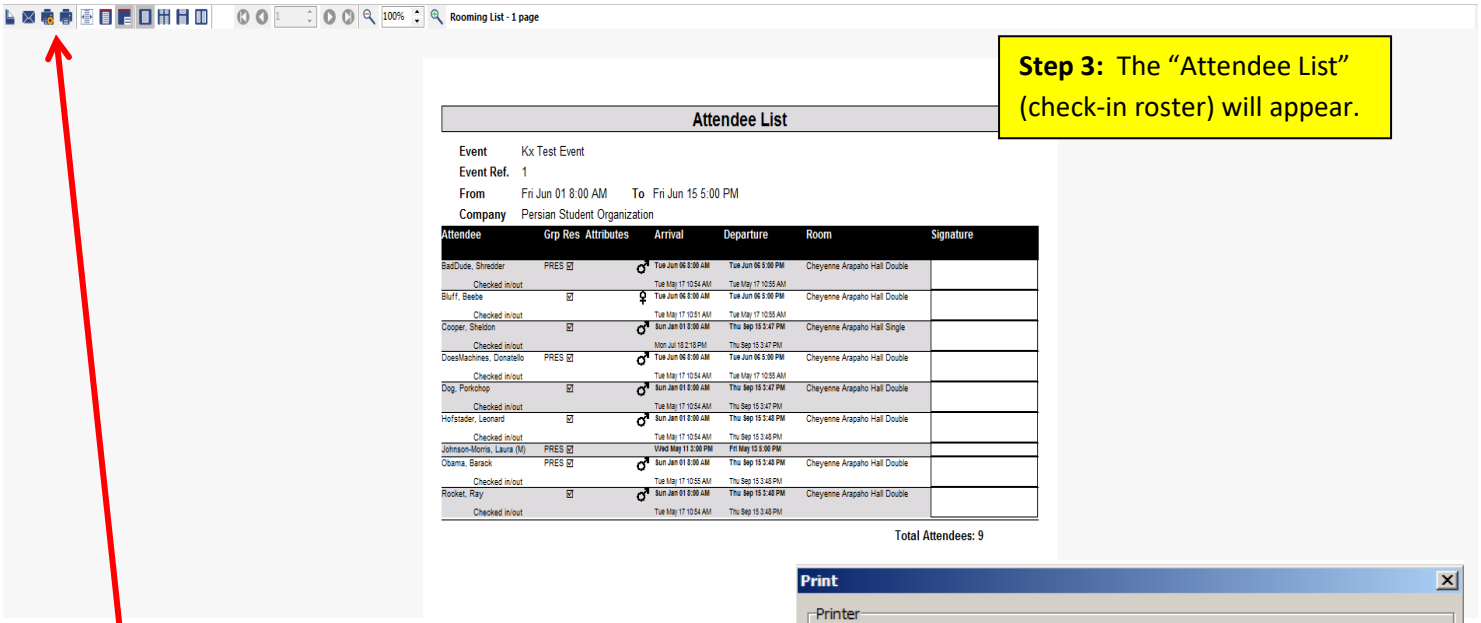
From that screen, you can click on the printer icon to print. Make sure you have loaded the printer with labels!

PRINT A CHECK-IN ROSTER



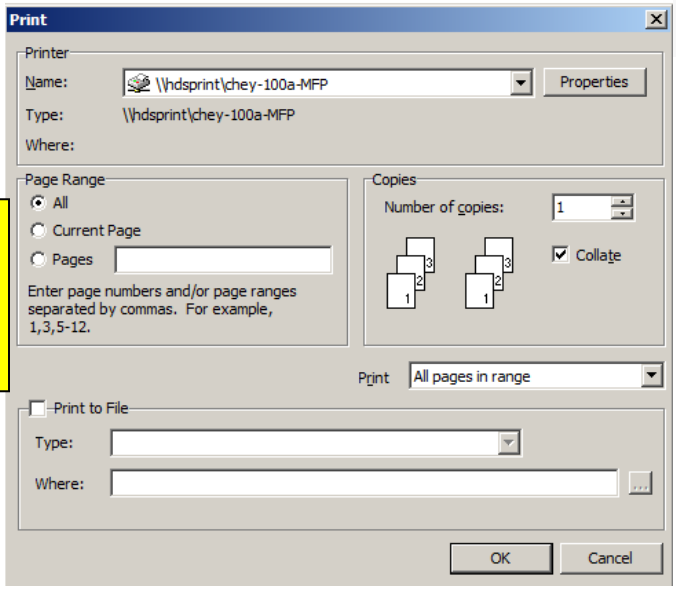
Step 1: In the "Attendees" screen, click on the checkboxes next to "Landscape" and "Expanded Signature Box" at the bottom of the screen.

Step 2: Select "Print" and click "Print."



Step 3: The "Attendee List" (check-in roster) will appear.

Step 5: To print, click on the printer icon in the Print toolbar.



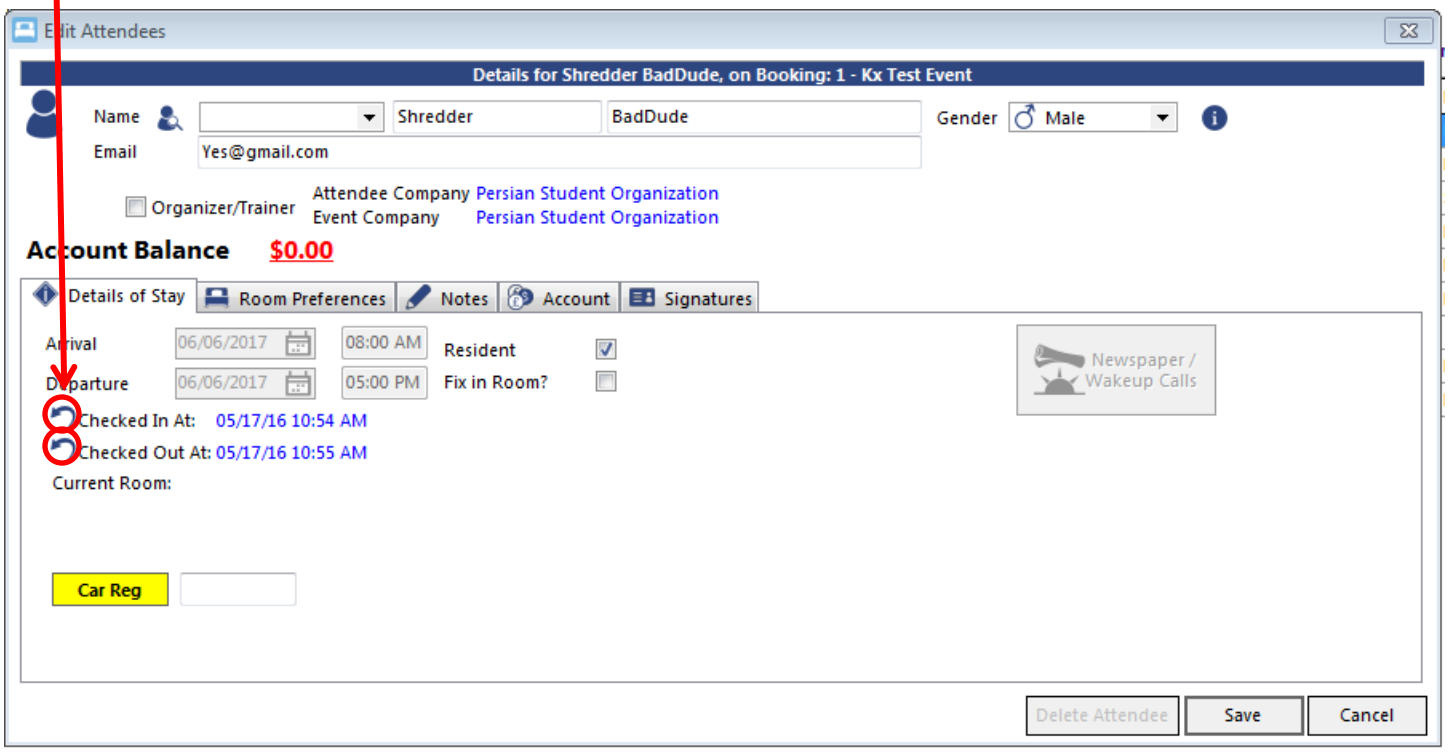
Step 6: A pop-up box will appear. Select your printer and click "OK."

HINT: To print a **room roster**, go back to the "Attendees" screen and sort the list of attendees by room number by clicking on the "Allocated Room" header. Make sure the box for "Landscape" is checked. Then, follow steps 2-6 above.

UNDO A CHECK IN OR CHECK OUT

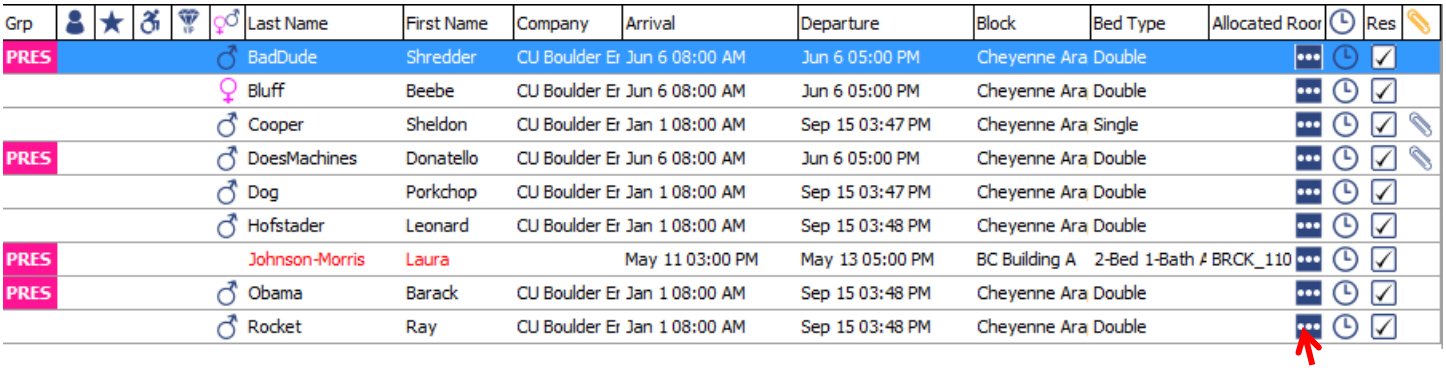
Step 1: Click the arrow next to **Checked In At:** or **Checked Out At:** on the attendee screen to undo a check-in or check-out.

HINT: If you need to undo a check-in, and the attendee has already checked out, you will have to undo the check-out first.

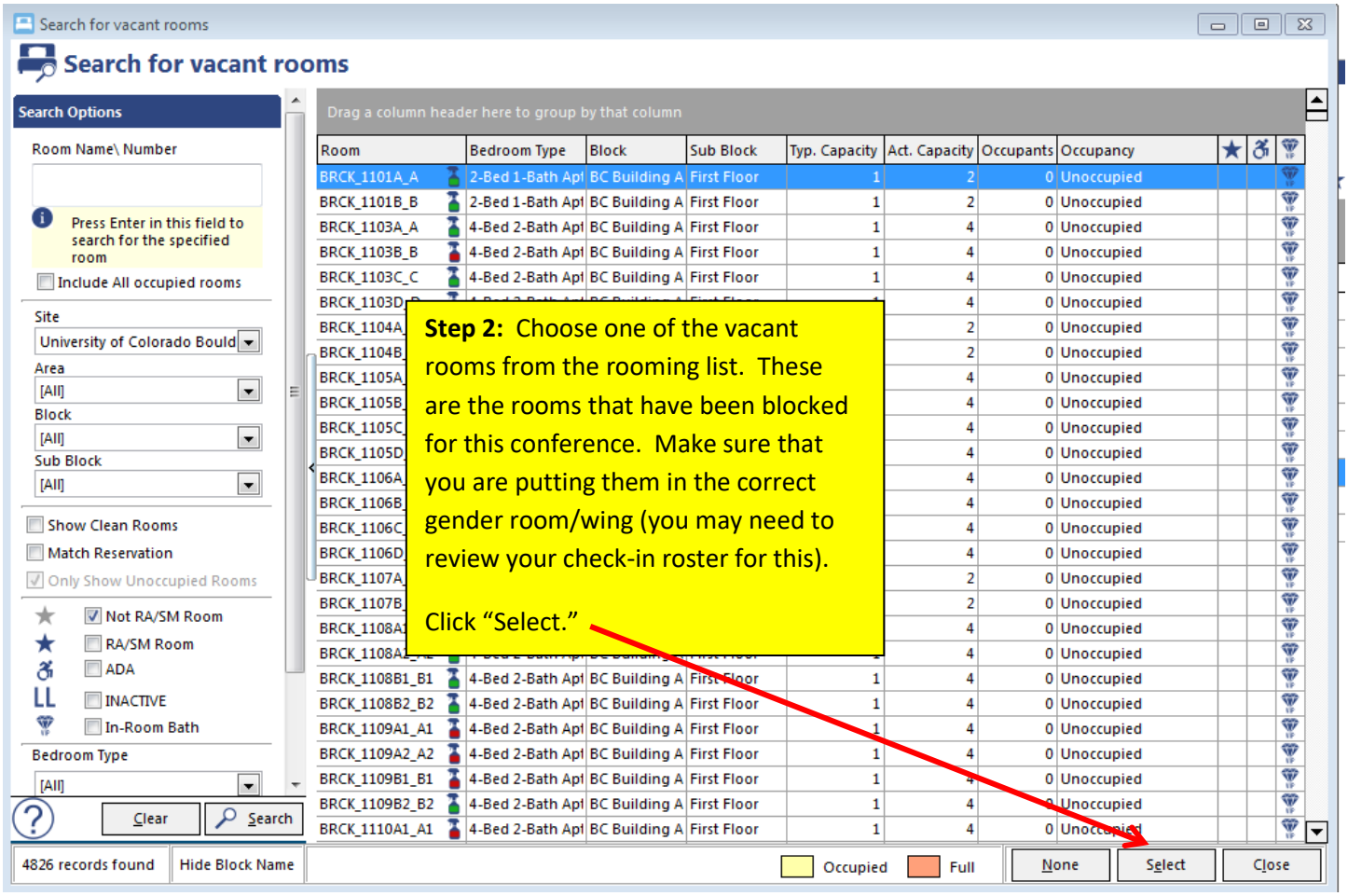


Step 2: Click **Save**

ASSIGN OR MOVE AN ATTENDEE TO A VACANT ROOM

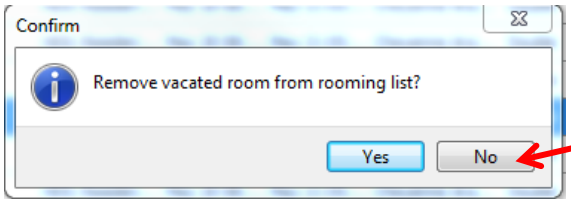


Step 1: From the Attendees screen, click the "…" box next to the Attendee's name.



Step 2: Choose one of the vacant rooms from the rooming list. These are the rooms that have been blocked for this conference. Make sure that you are putting them in the correct gender room/wing (you may need to review your check-in roster for this).

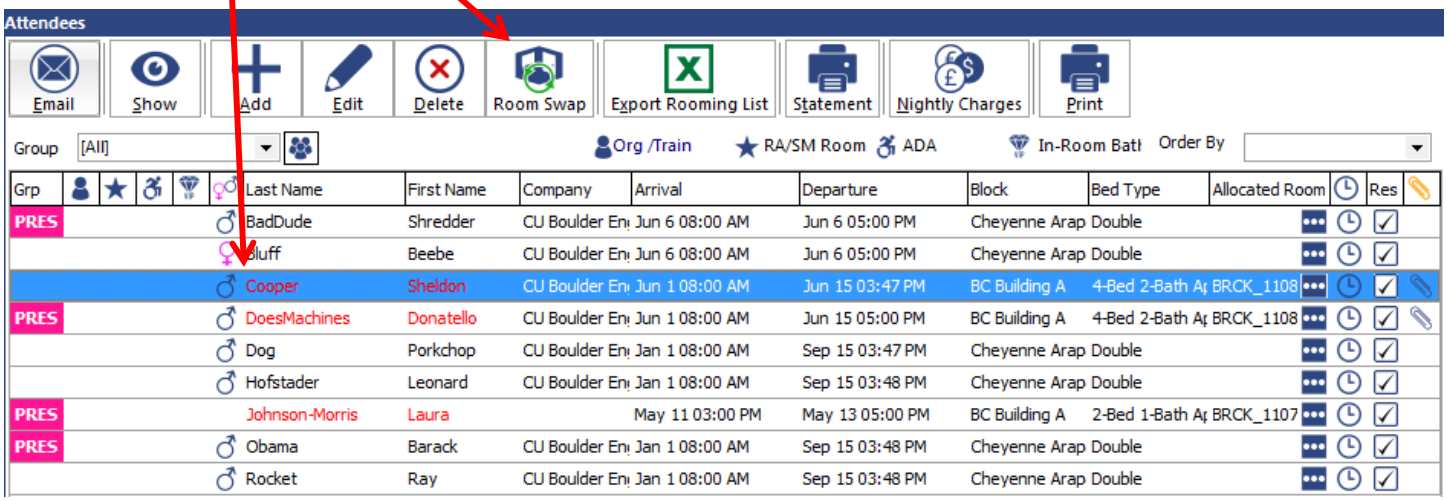
Click "Select."



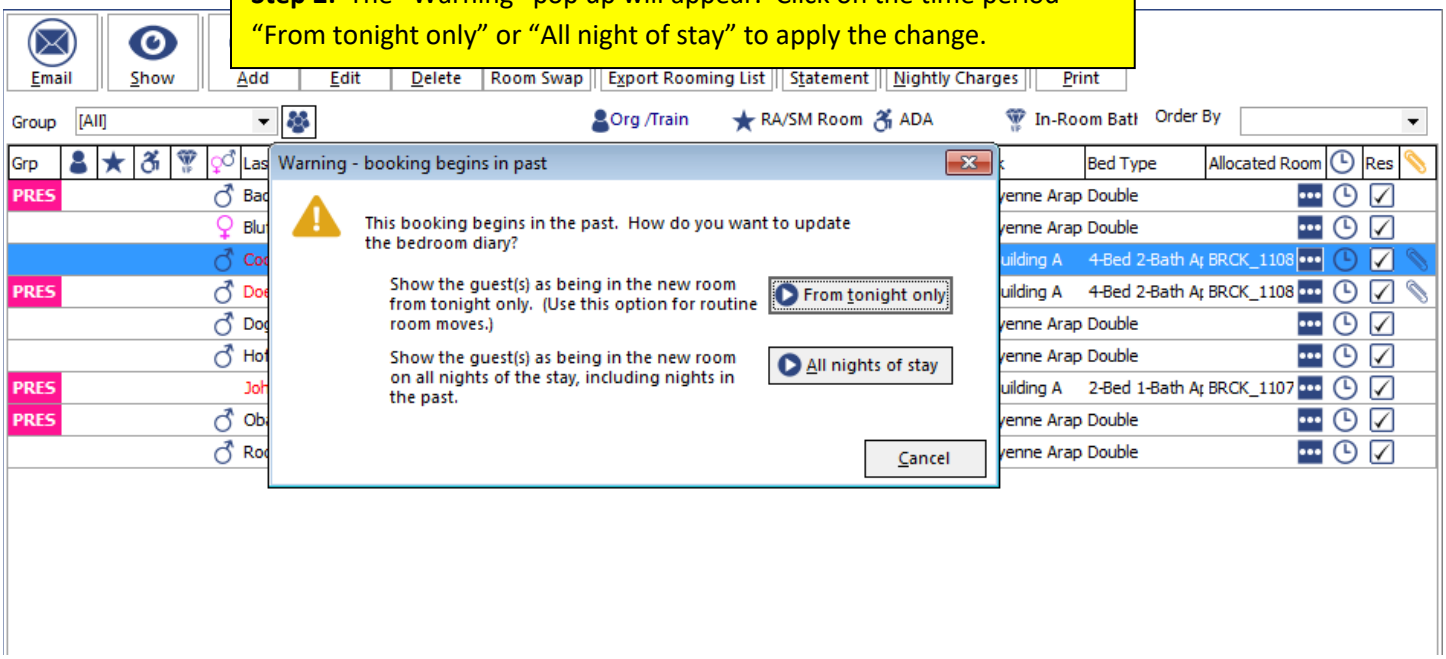
Step 3: A pop up will appear – click "No."

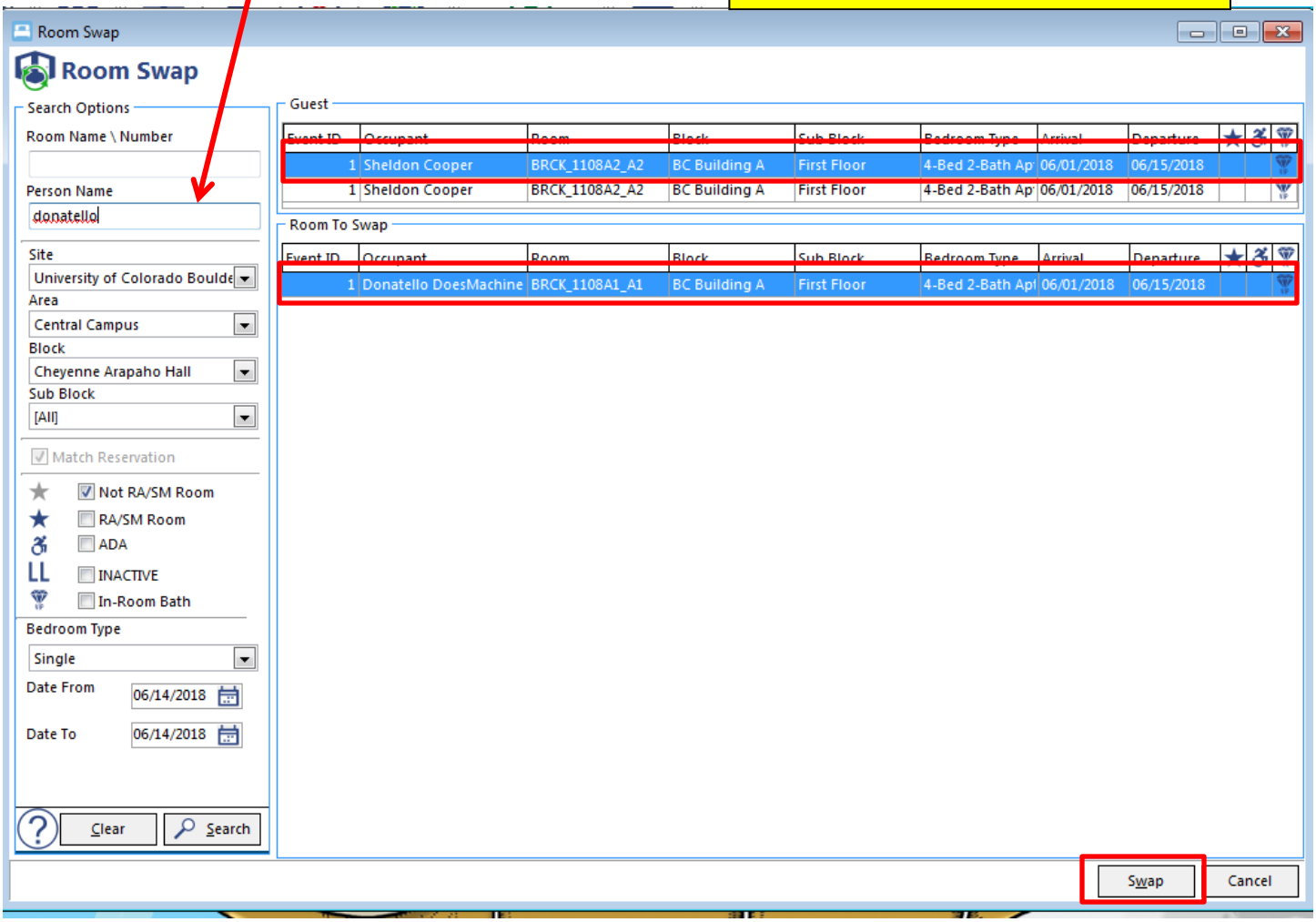
SWAP ATTENDEE ROOMS

Step 1: From the Attendees screen, highlight the first attendee's name. Then click on Room Swap.



Step 2: The "Warning" pop up will appear. Click on the time period "From tonight only" or "All night of stay" to apply the change.



Step 3: A "Room Swap "window will appear. Enter the other person's name in the left top corner; with whom the room is to be swapped.

Step 4: Click on the "occupant" from the "Guest" screen and the "occupant" from the "Room To Swap" screen. Then click Swap.