

Getting started with EVA Check-in



This guide will help you through the process of customising EVA Check-in to suit your business and get up and running quickly. The basic steps are:

1. Set up your site information (name and where it is)
2. Set up your visitor information (i.e. what kind of visitors will you have and what information do you need to collect from them)
3. Optionally, set up zones (if you want to divide a large site into smaller areas)
4. Print Check-in QR code posters for your site+zone+visitor combinations
5. Understand reporting and optional features such as thresholds and alerting

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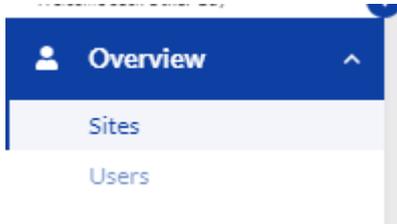
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Site Setup

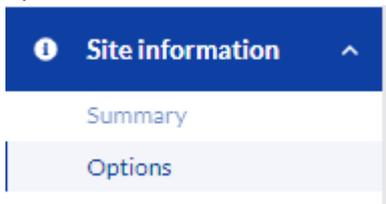
EVA Check-in comes with a default site, one administrator user, and one visitor type.

Set up a site for each physical location than people will check-in at.

1. Set up your site(s) using the Overview -> Sites menu option.
You can rename and edit the default site as needed.



- a. Click the name of the site to edit the name and other details for your site
 - b. Any other information you add on this page appears at the top of the visitor check in page with the Name e.g. Room, Floor, Address 1, Address 2 etc.
 - c. You can also set if a site is active or not on this page
 - d. Note. If you need to set up multiple sites there is an option to bulk upload sites under the Overview -> Sites menu option at the bottom of the sites list. "Bulk site Creation". See Appendix for bulk site creation tips.
2. Now to enable the rest of the Check-in features head to Site Information -> Options menu option. And click "Enable Check-in feature".



3. If you want to change the default messages your users will see when they check-in – such as the health and safety message - you change these here too:
 - a. Health and Safety title. This is shown if there is a health and safety message. It doesn't have to be called this and could be called 'Conditions of entry' for instance
 - b. Health and Safety message. This is shown prior to checking in. If you don't want to show a Health and Safety message leave this blank and no message will be shown. You can include a data privacy statement here too if you wish (in addition to what is on the poster).
 - c. Welcome Title. This is the title for the message that is shown after the visitor checks in.
 - d. Welcome Message. This is shown to visitors who have not checked in before
 - e. Welcome Back Message. This is shown to a user who has checked in previously
 - f. Sign Out Message. Shown when the visitor checks out.
 - g. Automatic Sign out at midnight. This will sign out everyone still checked in at midnight.
 - h. Automatic Sign out visitor types. Choose the visitor types you want to be automatically signed out at midnight. You can click on one to select a single visitor

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type or use hold “Ctrl” while clicking on specific types. Note: You can optionally set visitors types to time out after a certain time rather than at midnight – see visitor type settings below.

- i. Click save if you changed anything to save the options

Visitor Type Setup

EVA Check-in comes with one default visitor type called ‘visitor’. Change this name or set up your visitor types under Visitors -> Visitor Types menu option

This allows you to create different types of visitors such as Staff, Guests, Visitors, Couriers – whatever makes sense for your organisation. This is also where you set up what information you want to collect for each of these visitor types. i.e. You may want to collect more information for contractors - in case we need to contact them – than for staff.



- a. Edit the default visitor by clicking on the blue edit icon on the right side of the page.



- b. Change the Name as required
- c. Sub type is optional. It is useful if you need more than one type with the same name e.g. Staff – Teacher, Staff - Admin
- d. Add a description – this is to help describe the visitor type (optional).
- e. Required fields. The following are required fields and will always show on the check-in form:
 - First name
 - Last name
 - Phone*
 - Email*

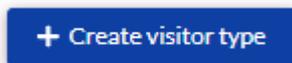
*You can choose whether either phone or email is required, or both.

- f. Choose the optional check-in fields. These will show on the check-in form if the check box is ticked.
 - Company
 - Car registration
 - ID number. There is also an optional label to display with the ID field e.g. Student ID, Employee number
 - Address. There is also an optional label to display with the Address field e.g. Business address
- g. There are also two optional custom fields: Custom Profile and Custom Check in. The profile field is part of that person’s details and is remembered every time they check in. E.g. their favourite colour. The Check-in field is not remembered as it can change

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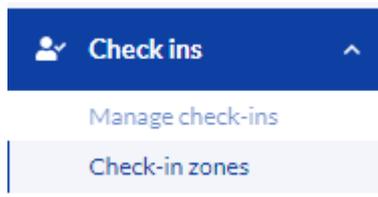
every time they check in e.g. 'who are you visiting'? You can also allow multiple line input on these fields.

- Custom Profile. There is also an optional label to display with the Custom profile field e.g. "Club".
 - Custom Check-in. There is also an optional label to display with the Custom Check-in field e.g. "Names of family members with you today"
- h. Party Size – if your situation is that you would like to have a group check in without everyone in the group complete their details (e.g. a family with kids) then you can enable the party field. The number added here will increment the number of people checked in on your site for reporting purposes. This works well with the Custom Check-in field above which can be used to capture the names of the people in the group.
 - i. Auto check out minutes – Optionally specify a period after which people are automatically signed out. Note that if you use this you might want to turn off 'automatic sign out at midnight' under the site settings.
 - j. Click save when you are finished
 - k. If you need more visitor types click on the blue + Create visitor type button



Zones Setup

If you want visitors to check in to different places within a site, e.g. floors in a building, a sports field within a park or several, or even a meeting room within an office, you can add zones to your site. This is found using the Check ins -> Check-in zones menu option. Zones are free to add on a site so you can add as many as you want. They allow you to establish different check-in places on a single physical site address, without creating extra sites.



- a. Click on the blue create zone button on the right of the page



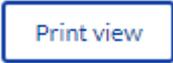
- b. Add a zone name and save

Print/Make QR Code Posters

Print Check in posters using the Check ins -> Manage check-in zones menu option

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- a. Select a Zone and Visitor Type and click on the blue QR icon . You can choose **any visitor type* and the QR code will take the visitor to a page where they can select the visitor type otherwise the QR code is for that specific visitor type.
- b. For the default QR code poster click the print view button . Otherwise you can create your own poster by copying the QR code on the page and pasting into your own document. You can also access a Screen View of the poster here. This is designed to be displayed on a monitor or tablet.

Manual Check-in

If a visitor does not have a device or cannot access the QR code, you can manually check in a visitor by using the Check ins -> Manage check-ins menu option



- a. Select a Zone and Visitor Type and click on the blue complete check-in icon 
- b. Complete the form for the visitor.

Reports

There are several reports to help manage the Eva Check-in site. Note that in these reports you will see data is obscured by **** for privacy reasons. If you need to see the details behind the **** mask then click the 'eye' icon on that row to see it. The action of revealing the information is logged for auditing purposes.

1. Who is Here

This page shows who has checked in to a site and shows the Site, Zone, when checked in and other information such as Name, Company etc. This page also allows you to check out all or selected visitors using the check box on the left side and the Sign out button at the bottom left of the page. You can also print the page using the print button on the bottom right. You can filter by Site and or Visitor type.

2. Visitor Count

This page shows how many visitors are checked in to each site and if you have set a threshold. If the count is under the threshold the number will be wrapped in a green box, on the threshold it is orange, over the threshold it shows in a red box.

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3. Activity Log

This page shows when visitors logged in and out. You can use the following filters to refine your search:

- First name
- Last name
- Company
- Meeting with
- Car Registration
- Site
- Date from
- Date to
- Visitor type

The report can also be exported as a comma separated (CSV) file.

4. Audit log

This page shows a history of all the individual events on the EVA Check-in site. There are several filters available to assist with the search:

- First name
- Last name
- Company
- Meeting with
- Car Registration
- Site
- Date from
- Date to
- Activity

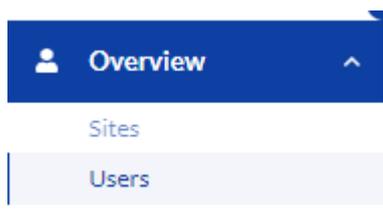
The report can also be exported as a comma separated (CSV) file.

5. Data Access Log

Records users' access to the EVA system – activity such as revealing masked data and exporting CSV files is audited.

Users

Add users who will help administer the check-ins or run reports.



1. Add a username, it must be unique across all EVA users (not just your account). Email addresses tend to work best for this.

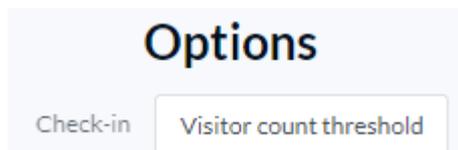
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2. Full name
3. Email address - must be unique. This is used for sending a notification and resetting password.
4. Assign a password. Users can change this later.
Passwords must be a minimum of 12 characters in length with at least 1 uppercase and 1 lowercase character, with no spaces.
5. Select access level
 - Customer (access to all sites set up for the customer)
 - Site (access to only the specific site selected below)
6. Customer is set for you
7. Select primary site – if the user has site access this is the only site they can access.
8. Select role(s) required
 - Customer Administrator- Full rights can do all of the roles below
 - Receptionist – Can view reports and manage manual check-in/outs on behalf
 - Operations – Can access audit logs and Login Administrator functions
 - Login Administrator – Can create/edit users and change passwords

Note: Any users added will get an email notification when they are added and you will need to send them their password or they can choose 'forgot password' and they will receive an email to reset it.

Thresholds and Visitor Arrival Notifications

If you want to get alerts or monitor the number of people on site vs a limit you set - say 100 people max - you can set up site visitor thresholds using the Site Information -> Options menu option and pick the Visitor count threshold tab.



Setting this will send you a notification email when the number of visitors to a site exceeds the number specified.

- a. Tick the active tick box
- b. Enter the visitors count threshold
- c. Enter the email address to be notified. If you want more than one email address notified separate the email addresses with a comma

It is also possible to get an email notification every time someone checks in at a zone. This is set up under the zone configuration.

Bulk Site Creation

If you need to set up multiple sites there is an option to bulk upload sites under the Overview -> Sites menu option at the bottom of the sites list. "Bulk site Creation". See Appendix for bulk site tips.

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This will take you to a page where you can upload a list of sites as a comma separated (CSV) file. An example of the format of the file can also be found on this page.

- a. Any fields with a comma must be enclosed in a double quote “
e.g. "1 Main St, With Commas and
newlines"
- b. Any fields with a double quote “ need to be both wrapped and doubled up.
e.g. Panmure "with quotes" becomes "Panmure ""with quotes"""