Getting started with EVA Check-in

This guide will help you through the process of customising EVA Check-in to suit your organisation and get up and running quickly.

The essential set up steps are:

1. Set up your site information (name and where it is)
2. Set up your visitor information (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 combinations and/or set up a kiosk. Test your setup by reading the QR codes.
5. Set your data retention policy to specify how long visitor information is retained
6. Understand reporting, users, and optional features such as thresholds and alerting

EVA also has several add-ons that cover more advanced scenarios including fully customisable check-in processes, geo-fences, pre-registrations and more. If you wish to use any of these add-ons please reach out and we'll give you a hand.

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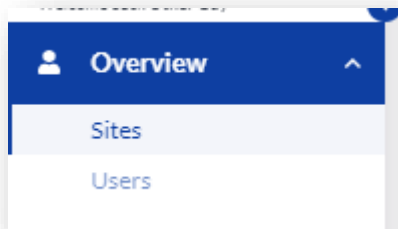
Essential Setup

Site Setup

EVA Check-in comes with a default site, one administrator user, and one visitor type. Edit the default site or add more sites as you need them.

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

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. Global location number is a special identifier. Read about it here.
   d. You can also set if a site is active or not on this page

   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. To enable the rest of the Check-in features head to **Site Information -> Options** and click "Enable Check-in feature".
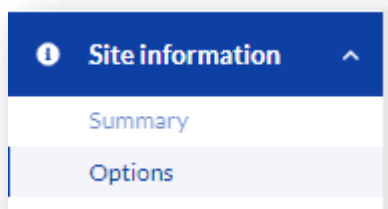
3. If you want to change the default messages your users will see when they check-in – such as the health and safety message - you change these here too:
   a. Health and Safety title. This is shown if there is a health and safety message. It doesn't have to be called this and could be called 'Conditions of entry' for instance.

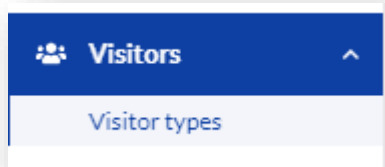**Need extra help? Try our chatbot in the portal, click 'Help', or get in touch at support@evacheckin.com**

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). This is a good place to put conditions of entry like "confirm you are not sick" etc.
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 before
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 type or hold "Ctrl" while clicking on specific types. Note: You can optionally set visitor 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
j. Note: you can stretch some of the field text boxes larger by dragging down the bottom right of the field.

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 you need to contact them – than for staff.

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

2. Change the Name as required

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3. Sub type is optional. It is useful if you need more than one type with the same name e.g. Staff – Teacher, Staff - Admin
4. Add a description – this is to help describe the visitor type (optional).
5. Required fields. The following will always show on the check-in form:

- First name - required
- Last name - required
- Phone – as per below*
- Email – as per below*

*You can choose whether either phone or email is required, both are required, or only one, or neither.

6. Choose the optional check-in fields. These will show on the check-in form if the check box is ticked.

- Company
- Address. There is also an optional label to display with the Address field e.g. Business address
- Car registration
- ID number. There is also an optional label to display with the ID field e.g. Student ID, Employee number

7. There are also two optional custom fields: Custom Profile and Custom Check in.
8. The Custom Profile field is part of that person's details and is remembered every time they check in. E.g. their Club.
9. The Custom Check-in field (called audit field in reports) is not remembered as it can change every time someone checks in e.g. 'what is your temperature? 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. "Temperature"

10. Party Size – if 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 size 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.
11. 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.
12. Click save when you are finished.
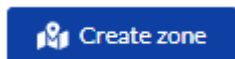13. If you need more visitor types click on the blue + Create visitor type button

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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 of 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 locations on a single physical site address, without creating extra sites.
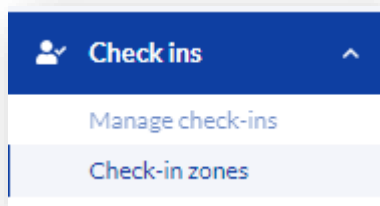
    a. Click on the blue create zone button on the right of the page

    b. Add a zone name and save

Note: Zones are more limited than sites. You can't specify a maximum number of visitors for a zone, or report by zone, although they do appear in CSV exports.

Print/Make QR Code Posters

Before your site can handle check-ins you need to **Enable check-in feature** for the site. See the button on the right of the **Check ins -> Manage check-ins** page. Enabling the check-in feature for the site incurs charges.

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

1. Select a Zone and Visitor Type and click on the blue QR icon

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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.

For the default QR code poster click the print view button Print view

Otherwise you can create your own poster by copying the QR code on the page and pasting into your own design. You can also access a "Screen View" of the poster here. This is designed to be displayed on a monitor or tablet. See Kiosk mode for how to use a shared device for checking in.

If you have lots of sites, as an advanced option you can export all your sites codes into Excel and create a Word mail merge or similar using your own poster design.

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


1. Select a Zone and Visitor Type and click on the blue complete check-in icon
2. Complete the form for the visitor. There is the option at the end of adding another person if than one person is checking in. Or adding a person from the same family – which will keep the contact information from the previous check-in.

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Kiosk Check-in

You can set up EVA to run on an iPad or Android tablet that visitors can use for self-service check-in. This is helpful as a permanent visitor management system or when visitors don't have a phone, or struggle or are reluctant to do QR scanning. The screen also displays the QR code for those that want to scan to check in.
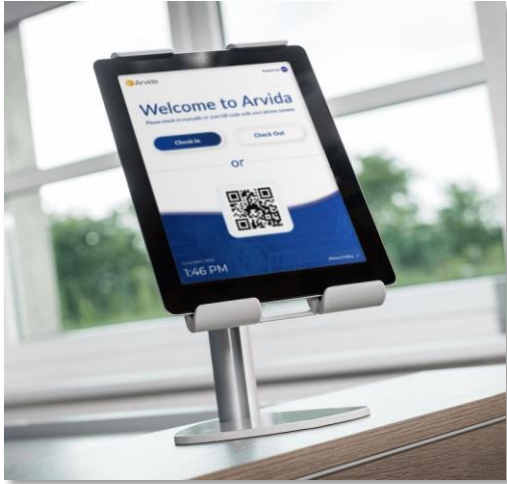
Learn more about this feature check-in-on-any-device-with-kiosk-mode.

The detailed setup instructions for registering an iPad or tablet as a kiosk are on the FAQ page of the EVA Check-in website. Contact us if you need further help.

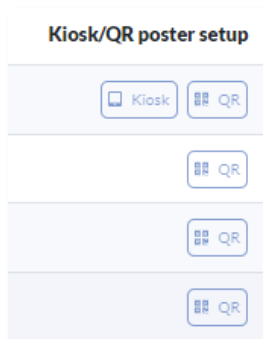We recommend you use our dedicated EVA Check-In Kiosk apps for a better experience.

   evacheck.in/apple-kiosk

   evacheck.in/android-kiosk

But you can also use Kiosk mode from your browser. my.evacheckin.com/kiosk. Follow the instructions the kiosk page accessible from **Check-ins -> Manage check-ins -> Kiosk button**

Kiosk mode will ask you for your visitor type early in the check-in process. There is one kiosk per zone.

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Host selection

In Kiosk mode you can be asked to identify the host you are visiting. The host name will be available from your Employees list (Overview -> Employees). The kiosk will display Employee names after the visitor has types in three letters of their name.

Host selection is also available if the visitor uses the QR code displayed on the kiosk for contactless check-in. However host selection is not available when scanning QR code posters because they can be copied and accessed off site.

When the "meeting with" is used the host can be notified a visitor has checked-in via email or text (extra charges apply for SMS). See **Site information -> Options -> Notification settings** – see **SMS Settings**.

Label Printing

Labels can be printed for visitors who use the Kiosk.

You need a Windows device attached to a printer to handle connections from EVA Check-In to your label printer.

Download our QuickPrint Client and install. Specific instructions available from support@evacheckin.com
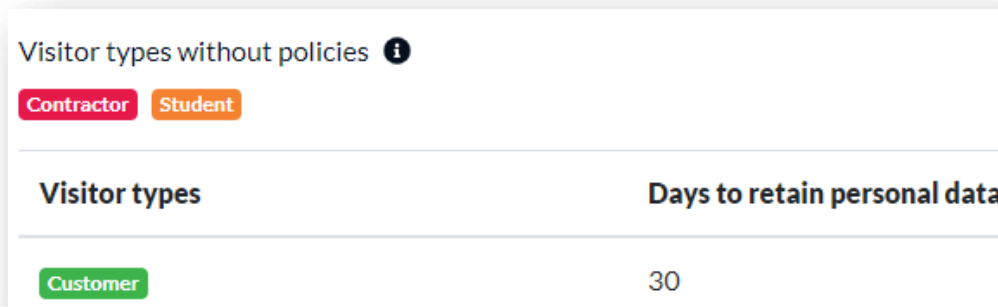

Data Retention policy

You can define how long the visitor information is retained and available for you to view. The settings are found at **Overview -> Data policy** menu option.
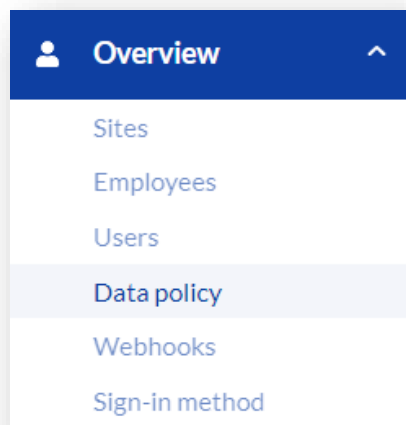
The default data retention period is 60 days. You can change that to the number of days you require. You can also edit the text displayed on the EVA Check-In QR code poster informing visitors of your retention policy.

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Data retention policies can be set by visitor type. For example, you may want a separate policy for customers. To set a new data retention policy, go to Overview > Data policy and click +Add visitor type data policy.

In the above set up, Contractor and Student use the default retention policy, Customer has a specific 30 day period.

Reports

There are several reports to help manage your EVA Check-in site. The are split into live information, under **Overview**, and historical reports in the **Reports** section.

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. **Overview -> 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. **Overview -> 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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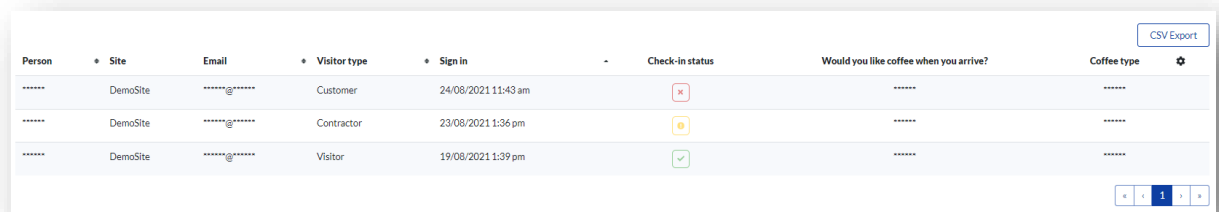
3. Reports -> Activity Log

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

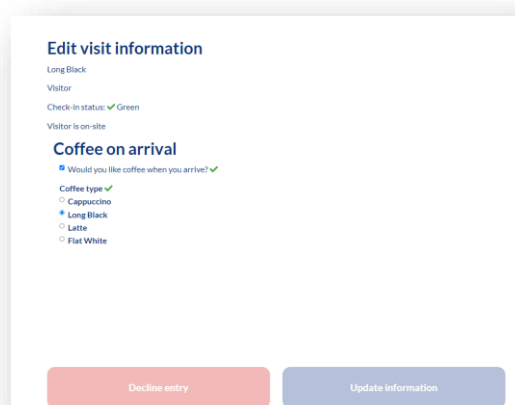The report can also be exported as a comma separated (CSV) file.

4. Reports -> Process log

This page allows you to see the responses to **Check-in processes**. These are only available if you have used check-in processes for pre-arrival or arrival. Filter the report and you will see the responses for each visit.

Click on the Check-in process icon (red, amber or green) and see the answers in each screen.

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5. **Reports -> 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.

6. **Reports -> Data Access Log**

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

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Additional Configuration Settings

This section covers more advanced set up options.

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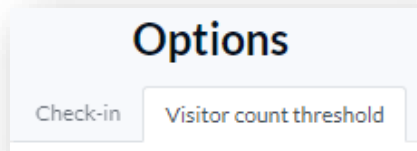
Setting this will send you a notification email when the number of visitors to a site exceeds the number specified.

1. Tick the active tick box
2. Enter the visitor count threshold
3. 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.

Check-in theme – add your own logo

You can add your own site logo displayed on check-in devices. Go to **Site Information -> Options > Check-in theme** to add your logo.

Click on the Browse box to select a logo file. Upload the file selected and the image will be displayed on this tab. You will see your logo displayed on the page.
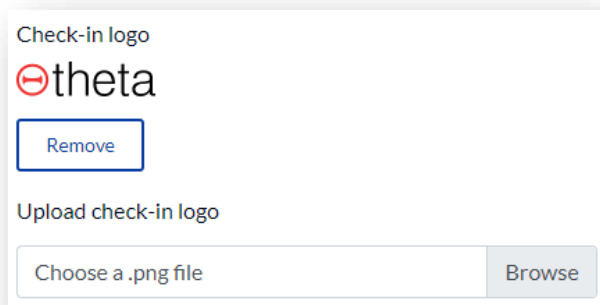
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You can see the image displayed on the Check-ins > Manage check-ins > Manual check-in page as well as on a device used for check-ins.
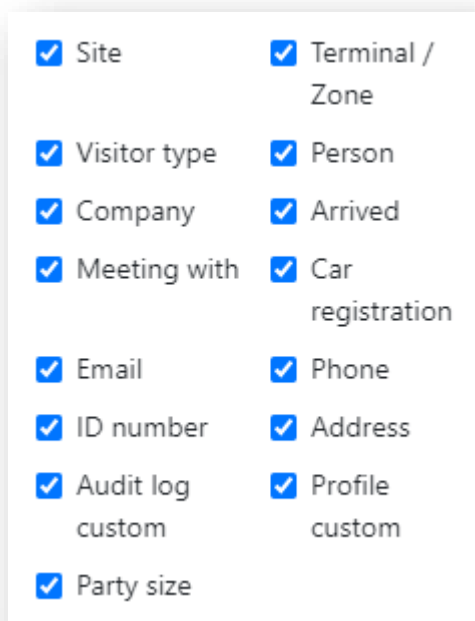
Image file specification

- The image file must be a .PNG file
- Ideally 100 x 100 pixels
- Square images display better than narrow or wide images
- No larger than 25 megabytes

Report Configuration

Columns displayed can be configured. Click the gear symbol   ⚙   at the far right of the column list.

Then select the columns you want displayed. For example the list of columns for the Who is here report below.

Users

You can add users who will help administer the check-ins or run reports. Users can be assigned to all sites within your account or to individual sites.

There are two ways users can sign-in to EVA Check-in. 1) using a password set up within EVA, or 2) using a Microsoft account. The benefits of using Microsoft Accounts are:

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1. If your team already have Microsoft accounts - e.g Office 365 accounts, they can use Microsoft credentials to sign-in and don't have to remember another password
2. If you have your Microsoft accounts configured to use multi-factor authentication (MFA) then this will apply when logging into EVA too
3. If you are using Microsoft Work/O365 accounts then, if someone leaves your organisation and you disable their work account, they will automatically be prevented from logging into EVA Check-in too

Note: To create accounts that use Microsoft you must first enable this sign-in method under "**Overview-> Sign-in methods**".

Users can be added under the user menu:
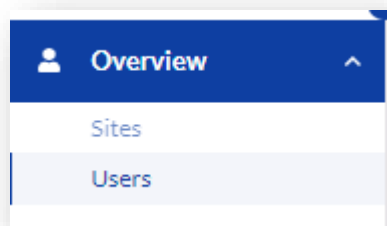
1. Add a username, it must be unique across all EVA users (not just your account). Email addresses tend to work best for this.
2. Full name
3. Email address - must be unique. This is used for sending a notification and resetting password.
4. Sign-in method – Either built-in username and password or (if enabled), Microsoft account).
5. Assign a password (if you are using the 'built-in' method). 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.

6. Select access level
   - Customer (access to all sites set up for your account)
   - Site (access to only the specific site(s) selected below)
7. Customer is set for you and cannot be changed.
8. Sites – if the user has site access this this is the list of sites they can access. Type names to add sites or select from the drop down list.
9. Select role(s) required as per next section and save.
10. Note: Users will not get an email notification when they are added. You need to send them their password or they can choose 'forgot password' and they will receive an email to reset it.

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11. If you have set up users to use Microsoft as their sign-in method, then they need to click on the 'Organisation login' button when they login. This will redirect them to the Microsoft sign in experience.

Roles

Users that access the portal can be set up for:

1. Customer - access to all sites set up for your account
2. Site - access to only specific site(s)

The roles and permissions available are:

1. Customer Administrator- Full rights, can do all of the roles below.
2. Receptionist – Can view the "who is here" and "visitor count" screens and manage manual check-in/outs on behalf of guests.
3. Operations – Can access "activity log" and "audit logs" reports only.
4. Login Administrator – Can create/edit users and change passwords.
   Note a Login Administrator can only add roles that they themselves have. So, if you want a Login Admin to be able to add new Receptionists, the Login Admin needs to be assigned the role of Receptionist as well as Login Admin.

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Bulk Data Loading

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 - click "Bulk site creation" at the bottom of the sites list.

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"""

Feel free to contact us for more help with Bulk Site creation and other bulk set up scenarios.

Bulk User Creation

If you need to set up multiple users, there is an option to bulk upload users under the **Overview -> Users** menu option - click "Bulk user creation" at the bottom of the users list.

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

Feel free to contact us for more help with Bulk User creation.

Bulk Employee Creation

To load bulk Employees for your list. **Overview -> Employees** menu option - click "Bulk employee creation" at the bottom of the Employees list.

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

Feel free to contact us for more help with Bulk Employee creation.

Send notifications to your checked in visitors

Checked-in visitors with our phone app and/or text messages. It could be used for emergency notifications or event updates.

- Users of the EVA Check-in mobile app can opt-in for push notifications. They are prompted when checking in to accept "informational updates".
- Visitors who have provided a mobile number can receive an SMS notification.
- Multiple notification messages can be saved and the selected for sending from the 'Who is here' report
- To send SMS messages you need to purchase SMS bundles through the **Account -> Billing** tab

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The settings for notifications are in **Site information -> Options -> Visitor Notifications**. You can select to send push notifications, SMS or both.

Create a message in **Site information -> Options -> Visitor Notifications** then send it by selecting recipients in the **Overview -> Who is here report**.

Cancelling, or suspending, your account

You can cancel your account at any time. Ongoing charges will cease on your account from the point. The account is not deleted so you can sign-in again and reactivate your subscription with your previous settings.

To cancel your account go to **Account -> Billing**, - click "Cancel your subscription" on the right of the page.

Overview of your Billing details

A summary of your billing can be seen at **Account -> Billing**.

You can

- View the current charges
- Download previous statements
- Change the billing party details

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Optional Add-ons

EVA has several add-ons that can extend the EVA Check-in experience. Additional fees apply, see https://www.evacheckin.com/pricing to find out more.

Custom Check-in Processes

If your check-in process is complicated, then our Custom Check-in Process feature is for you.

Custom Check-in Processes let you create your own extra fields and screens to capture whatever you want. These can vary by visitor type and different sites can use different processes. These processes can also be used with pre-registration.

Responses to questions can be classified to a green, amber or red status and then used to screen check-ins for different processing.

A Custom Check-In Process can be configured to be visible to specific visitor types, sites or zones. Parts of the process can be visible to specific visitor types.

Add a Check-in Process

Start creating a new process with **Overview -> Check-in processes -> Create process**

- Name your process
- The Details tab shows the messages the visitor gets when they complete the pre-arrival and check-in at arrival with an amber or red status.
- The Check-in screens tab is where you can add further screens and fields to your check-in process.

Add a new screen and fields to your process

Additional screens and fields can be added after the contact details screen.

Click + Add screen to add a new screen. Click on the new screen drop down to start editing the screen

Use Edit screen to change the name of the new screen. Select the visitor types you want to see this new screen on arrival.

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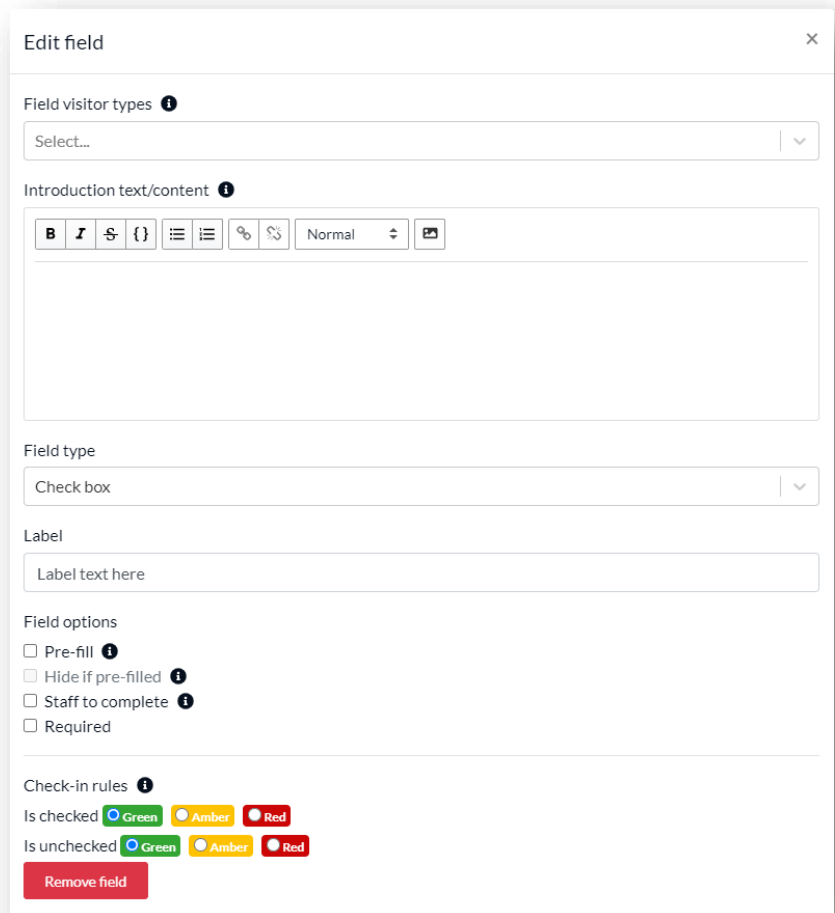
Add fields to your process

Use Add field to add custom questions and specify response actions. Click Edit field to configure the field.

Use Add content to add introduction text to your questions.

Select the visitor types that can see this field

Field types can be Text, Multi-Line Text, Date, Time, Number, Email, Check box, Select list, Radio button list

If you use a list option you can add choices in the Select list options field. Add to the list by typing the option an pressing Enter.

Edit field ✕

Field visitor types ⓘ

Select... ▿

Introduction text/content ⓘ

| **B** | *I* | S̶ | {} | ☰ | ☷ | 🔗 | ⤬ | Normal ▾ | 🖻 |

Field type

Check box ▿

Label

Label text here

Field options

☐ Pre-fill ⓘ
☐ Hide if pre-filled ⓘ
☐ Staff to complete ⓘ
☐ Required

Check-in rules ⓘ

Is checked 🔵 Green 🔘 Amber 🔴 Red
Is unchecked 🔵 Green 🔘 Amber 🔴 Red

Remove field

The Field options sections specifies how the field is used.

- Pre-fill - Pre-fill this field if this person has completed this check-in process previously and we still have the data
- Hide if pre-filled - Don't show this field if it has been pre-filled (people won't be prompted to complete it)
- Staff to complete – This field can not be completed by the visitor and must be filled by your staff
- Required – Mandatory

Check-in rules are used to choose what happens to the check-in depending on what the visitor answers. You can select which answers indicate green, amber or red.
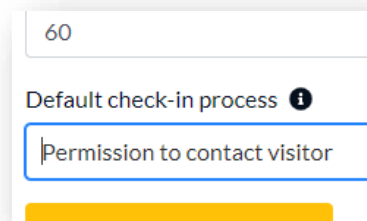
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Use Custom Check-in Process on site or zone

When you have finished configuring the screen and files Save the process.

You can make this process the default for the site **Site information -> Options**

You can also set different processes to be used by zones, **Check-ins -> Check-in zones,** zone Details.

Pre-registration

Pre-registration allows you to set up visitor details before they arrive and, optionally, send them a pre-registration checklist/survey/induction/form ahead of their visit.

Create a Pre-arrival process

Create a Custom Check-in Process by following the instructions in the previous section. **Check-ins -> Check-in processes -> Create process**.
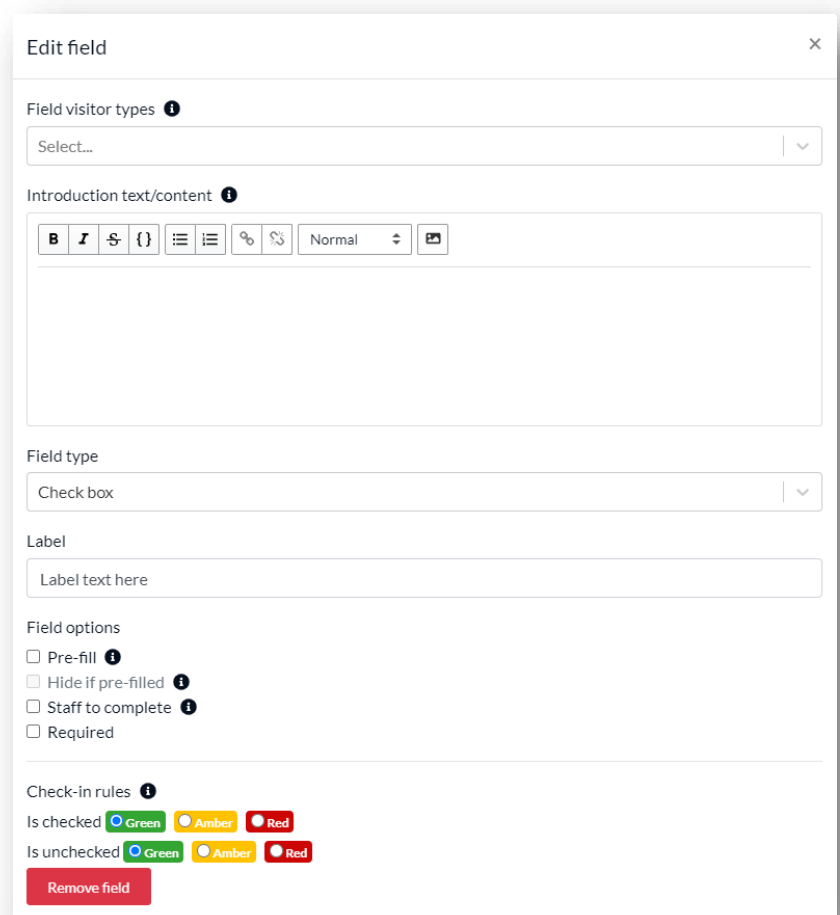
Go straight to the **Check-in screens** tab. Pre-arrival is at the top of this tab.

Add Pre-arrival screens (pages) for your process.

On those screens add fields for your pre-arrival questions. (Described in the Check-in Processes section)

Make sure you specify the visitor types that will see these screens and fields.

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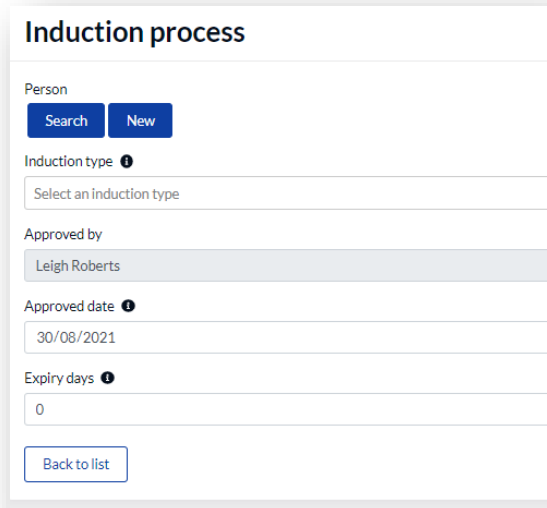
Adjust your Notification Settings

On **Site information -> Options**, the Notifications settings tab

Inductions and Certificates

Evidence of an induction can be a valid Certificate in EVA Check-In. Certificates can be attained by manual allocation or people completing the certificate process online.

To check current inductees use **Inductions -> Inducted people**.
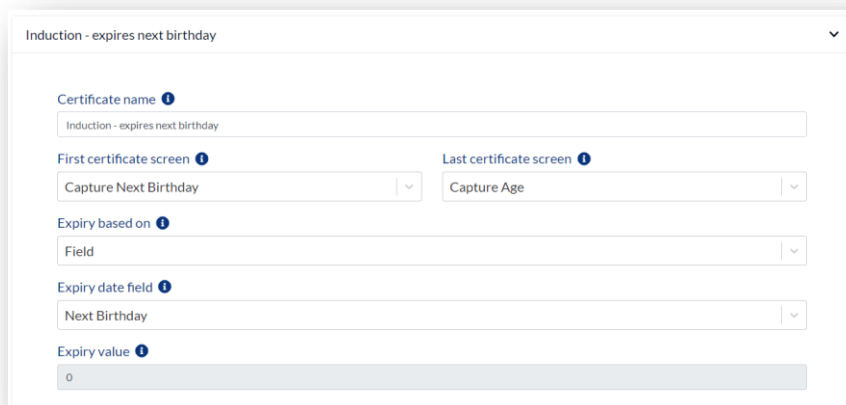
You can **+Add inducted person** using the button out to the right

Certificates

Set a Certificate to be a group of check-in screens and responses to have an expiry date. This can be used for induction records, information that changes infrequently, competition entries.

The visitor is not asked for this information again until the certificate has expired. For example

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Certificates also work with Pre-arrival screens so you can send prospective visitors questions to answer before they arrive.

The responses in a certificate are retained for the length of time specified for the certificate. They could be

- Capturing permit or licence dates

- Entries to competitions (single entry lists)

- Details only needed once a year – perhaps notification of cafeteria opening times

Add documents and photos for custom processes

In a custom process you can ask for a file or image during the pre-arrival stage. This is a new field type. See the example below.

When this appears in the pre-arrival questions for your visitors they will be prompted to select a file or take a photo with their device camera. This works whether they are completing it on their mobile or desktop.

If the visitor has not yet completed their pre-arrival when they check-in, they will be able to complete it on the Kiosk or via the app. When using the EVA Check-In Kiosk it will allow them to take a picture with the tablet camera.

Please get in touch if you need help designing your processes or certificates.

Geo-fencing

You can make it easier for staff and frequent visitors/contractors to check-in and out automatically using the EVA mobile app with location tracking and geofences. Once enrolled at a site, staff can be reminded or automatically checked-in and out without having to scan a code (staff opt-in to this on their phones).

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Set up a Virtual Perimeter

Set up Geofences for you site at **Site information -> Geofences**. This is an additional cost.

You can create multiple geofences for your site. The geofenced region can be a circle or a polygon. Each needs to be at least 10,000 sq. m.

Prompted or Automatic Check-in

Once the geofence is active staff, regular contractors or site visitors can choose to be prompted or check in automatically based on their location, using the EVA Check-in app.

The first time they use a QR code to scan into an activated site they are prompted to make settings changed in their phone. The settings enable the phone to check if it is in or out of a geofence. If there is a change in that status the EVA app notifies EVA Check-In of a check-in/out. EVA Check-In does not constantly monitor the device location.

Accuracy

You might be used to seeing an accurate dot on a map in Google Maps. EVA relies on background location data which is both less accurate and less battery hungry. This means geofences are generous (100m radius) and you may get check-in/out notifications several minutes after you arrive/depart.

Some phones aggressively shut down background applications, like the utility that checks if the user is inside/outside a geofence. This can account for EVA Check-in missing events.

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AD Sync and Import

The 'meeting with' feature in the EVA kiosk notifies the host that their guest has arrived. The list of hosts can be manually added or automatically kept up to date. If you wish to synchronise your staff listing with your Active Directory, then use this add-on.

It supports Azure AD and on-premises Active Directory servers. You can also import list of staff from multiple sources – or use the import to handle groups of people like residents that aren't in your Active Directory.

This is feature is best configured by people familiar with your Active Directory. For further instructions please contact support@evacheckin.com.
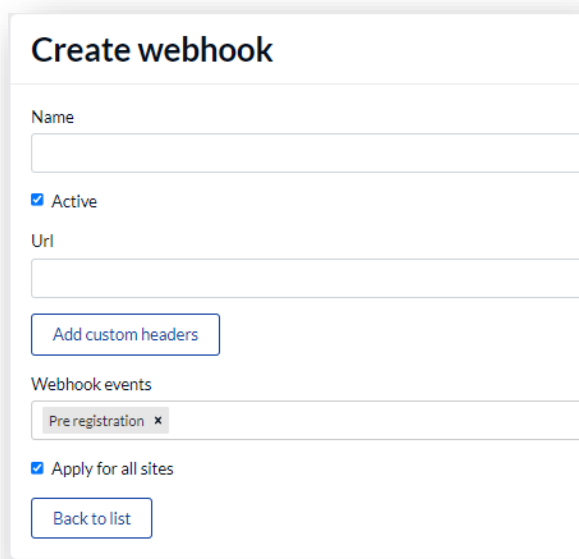
Integrations

Integration options between EVA Check-In and other systems are located in **Account -> Integrations**.

Webhooks

EVA Check-In can call webhooks when any of the following occur

- Pre registration
- Check in
- Check out

Webhooks are easy to set up.
- Name the webhook
- Enter your url to receive the Post
- Select the event.

That's it.

Reporting API

Using the Reporting API is an extra cost item, see pricing here. Documentation of the options are here.

Get in touch with support@evacheckin.com if you wish to use this feature.

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Procore

Construction companies using Procore to manage their projects can get check-in information loaded into Procore using our newest integration. This saves time by avoiding manually keying the data and, because data is sent throughout the day, the information is more up to date.

You can see how many contractors are on site from each company and track work hours. Every time vendor company personnel check-in the log in Procore is updated. The first time they check-in they select their company from the list in Procore for that site. Visitor logs are also recorded in a similar way.

Get in touch with support@evacheckin.com if you wish to use this feature.

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