Business Solution ELO Visitor

Business Solution ELO Visitor 1.06



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null

Introduction

Contents of the manual

The goal of this user guide is to explain all functions of Business Solution ELO Visitor.

Basics

The *Basics* chapter explains the basics of the ELO Visitor program interface.

Possible actions and other elements

The remaining chapters address possible actions and other elements of ELO Visitor.

Target audience

This manual is addressed to Business Solution ELO Visitor users. Separate documentation is available for administrators on the ELO SupportWeb.

The scope of functions presented in this manual may differ greatly from those in your client.

If you do not find functions described in this manual in your client, you do not have permission to perform the action.

Basics

Basic principle

Business Solution ELO Visitor assists you from registering to checking out visitors.

All employees with access to ELO Visitor can pre-register visitors or groups, which are then checked in at the front desk.

At the front desk, you can also:

- Greet visitors with a welcome screen
- Create visitor badges with pictures
- Have visitors sign documents

ELO Visitor helps you keep an overview of planned, current, and past visits:

- Dashboard: The dashboard gives you an overview of all visitors or groups in a table or calendar format.
- Dynamic folders: Once a visitor or group has reached a specific deadline, the relevant file is automatically moved to the corresponding folder.
- Colored visitor files: The color of a visitor file indicates the current status of the visitor.
- Visitor lists: You can create lists of visitors who are currently checked in.

General note

ELO Visitor works with the following clients:

- ELO Web Client
- ELO Java Client
- ELO Desktop Client

Information

In this manual, we use screenshots from the ELO Web Client.

Requirements

Your administrator must have configured ELO Visitor for you.

Program interface

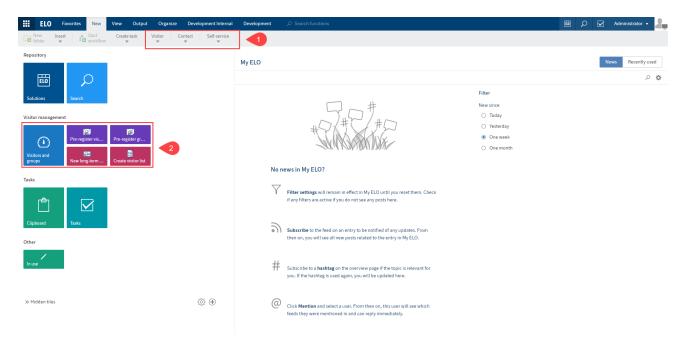


Fig.: Business Solution ELO Visitor program interface

You will find ELO Visitor functions in the following areas:

1 Visitor group on the New tab

For more information, refer to the chapter 'New' tab.

The *Contact* group is where you manage contacts. See the Contact management chapter for more information.

Users can check themselves in and out via the *Self-service* group. For more information, refer to the chapter Self-service.

2 The tiles *Visitors and groups, Pre-register visitor, New long-term badge,* and *Create visitor list* in the tile area

The screenshot shows several ELO Visitor tiles in a group. However, this view can vary depending on your individual configuration.

You will find more tiles in the tile navigation under Hidden tiles.

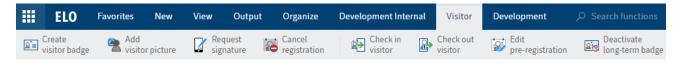


Fig.: 'Visitor' tab

3 'Visitor' tab

When you select an existing visitor, the Visitor tab opens.

This tab contains all the functions relevant for individual visitors.

For more information, refer to the chapter 'Visitor' tab.

Repository

The structure and appearance of your *Repository* work area depend greatly on your specific configuration. The default state is described here.

A visitor file is created for each visitor.

Visitor files are saved to // Visitor management // Visitors.

Dynamic Folders

- Visitors by date
 - Expected visitors (...30 days)
 - 💦 Morgan, Susan (8/9/2021)
 - Robinson, Heather (8/6/2021)
 - 💦 Walker, Emma (8/1/2021)
 - > Overdue visitors (....30 days)
 - Recent visitors (...30 days)
 - Allen, Hazel (7/12/2021)
 - Durham, Noel (8/14/2021)
 - Green, Peter (8/9/2021)
 - Lopez, Pedro (8/19/2021)
 - Reily, Brian (8/9/2021)
 - Scott, Cassandra (8/10/2021)
 - Simmons, Kim (7/27/2021)
 - White, Tim (8/9/2021)
 - Wood, Tom (7/17/2021)

Fig.: Dynamic folder in the repository

Dynamic folders sort the visitor files and group folders by deadlines.

Status

The visitor files and group folders are shown in different colors depending on their status:

- Gray: PR pre-registered
- Green: CI checked in
- Blue: CO checked out
- Red: CA pre-registration canceled

'Visitor' form

Visitor

Scott, Cassandra (07.07.2021)

Appointment data					63
Topic	Software training				
Start	Jul 7, 2021	10:00	End	Jul 7, 2021	16:00
isit data					
Arrival	Jul 7, 2021	09:55	Departure		;
Arrival by	T - Train				
ocation					
Branch *	Headquarter	E	Precise location	Training rooms	_0
Employee responsible *	Jessica Davis	_//			
Pick-up requested	🔿 Yes 🔘 No				
ersonal information					
Contact ID		_//	Company		_0
First name *	Cassandra	_//	Last name *	Scott	_0
^o hone number			E-mail		
ELO user name		_//	Internal employee		
Category	VI - Visitor	E			
Save P	Print				

Fig.: 'Visitor' form

The Visitor form contains information on the appointment as well as the visitor.

Information

If you move the cursor over the visitor's picture, it is shown in a larger format.

In addition to the form, the visitor file may contain additional documents related to the visitor, for example signed documents or a visitor badge.

'Group' form

Group John's Plumbing (26	5.10.2021 - Carter, H	enry)						
Appointment data								
Торіс	Sanitary facilities							
Start	Jul 22, 2021	11:00	End				:	
Location								
Branch *	Headquarter		Precise loc	ation	Sanitary	facilities	_0	
Employee responsible *	Adrian Smith	•						
Pick-up requested	🔾 Yes 💿 No							
Group								
Group name *	John's Plumbing		Category		CR - Craftspersons		:=	
E-mail	John@John.com							
Visitors								
First name	Last name	Company	E-mail	Telephon	e			
Henry	Carter	John's Plumbing				×		
Employee responsible	e 🗌 Internal employee	checked in						
Emma	Lancaster	John's Plumbing				×		
Employee responsible	e 🗌 Internal employee	checked in						
Add visitor								
Save Prin	t							

Fig.: 'Group' form

The *Group* form contains information on the group appointment as well as a list of the group members.

Besides the form, the group folder may contain additional documents related to the group, for example visitor badges or e-mails.

In addition, a visitor file is created for each group member in the group folder upon check-in. These visitor files have the same structure as those of individual visitors.

'New' tab

On the *New* tab, you will find all the functions you can use to pre-register or check in visitors on the spot in the *Visitor* group.

You can also create Long-term badges and Visitor lists.

You will learn how to proceed after creating a visitor in the chapter 'Visitor' tab.

Pre-register visitor

Information

You want to register a visitor for an appointment in the future.

Alternative

<u>Register visitor</u>: If the appointment will take place right away, use this function.

Method

1. On the ribbon, go to the New tab and click Visitor > Pre-register visitor.

Visitor: Default			×
Pre-registration of a single	e visitor.		
Appointment data			
Topic *	Software training		
Start *	Jul 16, 2021 🗰 09:00	End	Jul 18, 2021 📰 17:00
Location			
Branch *	Headquarter	Precise location	_/
Employee responsible *	Jessica Davis 🥒		
Pick-up requested	🔿 Yes 🔘 No		
Personal information			
Contact ID	_/	Company	_//
First name *	Christine _/	Last name *	Evans _/
Phone number		E-mail	ChristineEvans@email.com
ELO user name	_/	Internal employee	
Category	VI - Visitor		
Send invitation			
If the e-mail address is ent	ered correctly, an invitation is sent for the visit right	t away.	
	Send e-mail invitation	Invitation template	Invitation _/
Contact management			
New visitors are automatic over and offered for autoc	cally created in the contact manager if the following omplete in the future.	; option is enabled. The data i	in the form is taken
Save			OK Cancel

Fig.: 'Visitor' dialog box

The *Visitor* dialog box contains fields with information on the planned appointment, the location of the appointment, and the visitor.

Mandatory fields are marked with a red asterisk.

Fields with a pencil icon contain keyword lists. When you enter a value in the respective field, matching list entries appear.

1. Fill out the fields accordingly.

Contact reference: If the visitor is already created as a reference, they have a contact reference that you can select from the suggestions. Otherwise, the field is left blank.

ELO user name: If the visitor has an ELO user account, enter their name in this field.

Send e-mail invitation: In the *Invitation template* field, select an appropriate invitation template. Once you click *OK*, the e-mail is sent.

Create new contacts: If you select this option, a contact reference is automatically created and the entered visitor information is saved. The next time you log on, you can access the saved data and don't have to enter it again.

1. Click OK.

Result

The file is created in the // Visitor management // Visitors // [Year] // [Month] folder.

The form contains the entered information and can be changed later on.

As the appointment will take place in fewer than 30 days, the file also appears in the folder // Visitor management // Visitors by deadline // Visitors expected in the next 30 days.

If you checked the *Create new contacts* box, the contact information is filed to the *Visitor contacts* folder, where you can enter additional data.

Outlook

You can correct or update data entered with the Edit pre-registration function.

Before the appointment or on the day of the appointment, you can create a visitor badge.

You can add a visitor picture and request a signature on the day of the visit.

If the visitor cancels, you can cancel their registration.

Otherwise, you can use the Check in visitor function on the day of the appointment.

Pre-register group

Information

You want to register a group for an appointment in the future.

Alternatives

<u>Pre-register company</u>: If you don't want to register each member of the group by name, use this function.

Register group: If the appointment will take place right away, use this function.

Method

On the ribbon, go to the *New* tab and click *Visitor* > *Pre-register group*.

Pre-register group	gister group					
Pre-registration of a visit	or group.					
Appointment data						
Topic *	Company presentation					
Start *	Jul 14, 2021	09:00	End	Jul 14,	2021	15:00
Location						
Branch *	Headquarter	:=	Precise location	Main buildir	ng	_//
Employee responsible *	Jessica Davis	_//				
Pick-up requested			To be picked up by Adrian		h	_//
Send invitation						
If the e-mail address is e	ntered correctly, an invitation is s	sent for the visit right a	way.			
	Send e-mail invitation		Invitation templa	ate Invitation		_//
Group						
Group name *	Local High School		Category	VI - Visitor		II
E-mail secretariat@LocalHighSchoo		iool.com				
Visitors						
First name	Last name	Company	E-mail	Telephone		
Pedro	Lopez	Local High Schoc	Perdo@Lopez.co		×	
Employee responsi	ble 🗌 Internal employee	checked in				
Sandy	Baker	Local High Schoc	Sandy@Baker.co		×	
Emplovee responsi	ble 🗌 Internal emplovee	checked in				
Save P	int				ок	Cancel

Fig.: 'Pre-register group' dialog box

The *Pre-register group* dialog box contains fields with information on the planned appointment, the location of the appointment, and the group.

Mandatory fields are marked with a red asterisk.

Fields with a pencil icon contain keyword lists. When you enter a value in the respective field, matching list entries appear.

Send e-mail invitation: In the *Invitation template* field, select an appropriate invitation template. Once you click *OK*, the e-mail is sent.

Employee responsible: There must be exactly one person responsible. If you do not select a group member, the first person in the list is automatically selected as the employee responsible.

Checked in: This option is not active in *Visitors*. The box is automatically checked as soon as you check the visitors in.

1. Click *OK*.

Result

The file is created in the // Visitor management // Visitors // [Year] // [Month] folder.

As the appointment will take place in fewer than 30 days, the file also appears in the folder // Visitor management // Visitor groups by deadline // Groups expected in the next 30 days.

The Group form contains the entered information. Each member of the group also has their own form, which you can edit.

Outlook

You can correct or update data entered for the group and group members with the Edit preregistration function.

Before the appointment or on the day of the appointment, you can create visitor badges.

You can add visitor pictures and request signatures on the day of the appointment.

If the visitor cancels, you can cancel their registration.

Otherwise, you can use the Check in visitor function on the day of the appointment.

Pre-register company

Information

You want to register a company for an appointment in the future. During registration, you only enter the number of visitors.

Alternative

<u>Pre-register group</u>: If you want to register each member of the group by name, use this function.

Method

1. On the ribbon, go to the *New* tab and click *Visitor > Pre-register company*.

Business	Solution	ELO	Visito
-----------------	----------	-----	--------

Pre-register company				×
Pre-registration of a compa	any.			
Appointment data				
Topic *	Fire safety			
Start *	Jul 22, 2021 🗰 09:00	End	Jul 22, 2021 📰 17:00	
Location				
Branch *	Headquarter	Precise location	Backyard and training rooms _/	
Employee responsible *	Jessica Davis _/			
Pick-up requested	● Yes ○ No	To be picked up by	Jessica Davis _/	
Company				
Company *	New York City Fire Department _/	Category	VI - Visitor	
Number of visitors *	5	E-mail	firedepartmentnyc@email.com	
Send invitation				
If the e-mail address is ente	ered correctly, an invitation is sent for the visit right away.			
	Send e-mail invitation	Invitation template	Invitation _/	
Save Prir	nt		ОК	Cancel

Fig.: 'Pre-register company' dialog box

The *Pre-register company* dialog box contains fields with information on the planned appointment, the location of the appointment, and the group.

Mandatory fields are marked with a red asterisk.

Fields with a pencil icon contain keyword lists. When you enter a value in the respective field, matching list entries appear.

1. Fill out the fields accordingly.

Send e-mail invitation: In the *Invitation template* field, select an appropriate invitation template. Once you click *OK*, the e-mail is sent.

1. Click OK.

Result

The file is created in the // Visitor management // Visitors // [Year] // [Month] folder.

As the appointment will take place in fewer than 30 days, the file also appears in the folder // Visitor management // Visitor groups by deadline // Groups expected in the next 30 days. The Company form contains the entered information. Each member of the company also has their own form, which you can edit.

Outlook

You can correct or update data entered for the company and company members with the Edit preregistration function.

Before the appointment or on the day of the appointment, you can create visitor badges.

You can add visitor pictures and request signatures on the day of the appointment.

If the visitor cancels, you can cancel their registration.

Otherwise, you can use the Check in visitor function on the day of the appointment.

Register visitor

Information

You can check in a visitor on the day of an appointment without pre-registering them. At the end of this process, the visitor is checked in.

Alternatives

<u>Pre-register visitor</u>: If the appointment will take place in the future, use this function.

Method

1. On the ribbon, go to the *New* tab and click *Visitor* > *Register visitor*.

Register vis	sitor								×
Registratio	n of a single	e visitor.							
Check in	Visitor	lata							
Visit data									
Arrival *		Ju	ul 7, 2021 📰	09:00	Departure			:	
Arrival by		T - Train		I					
Personal ir	nformation								
Contact II	D			_//	Company			_//	
First nam	e *	Tim		_//	Last name *	White		_0	
Phone nu	mber				E-mail	TimWhite@e	email.com		
ELO user	name			_//	Internal employee				
Category		VI - Visit	or	I					
Contact ma	anagement								
New visito over and o	ors are autor offered for au	natically cre itocomplet	eated in the contact m te in the future.	anager if the following	goption is enabled. The d	lata in the form is	s taken		
		Creat	e new contacts						
Visitor pict	ture								
Please print	t and hand o	ut the visito	or badge after checkin	g in the visitor					
		Clear	file						
Save		Print					ОК	Cancel	

Fig.: 'Register visitor' dialog box

In the *Register visitor* dialog box, you will find the input fields for checking in the visitor on two tabs.

Mandatory fields are marked with a red asterisk.

Fields with a pencil icon contain keyword lists. When you enter a value in the respective field, matching list entries appear.

1. Fill out the fields on the Check in tab accordingly.

Contact reference: If the visitor is already created as a reference, they have a contact reference that you can select from the suggestions. Otherwise, the field is left blank.

ELO user name: If the visitor has an ELO user account, enter their name in this field.

Create new contacts: If you select this option, a contact reference is automatically created and the entered visitor information is saved. The next time you log on, you can access the saved data and don't have to enter it again.

Take a picture/Select a file: You can take a picture of the visitor using a webcam or select a picture from your file system.

Document: If you want the visitor to sign a document on arrival, select the document here.

Send to: The document selected under *Document* is sent to the user account that you select in the *Send to* field. The selected user account should be accessed via a mobile device in order to be able to have the document signed.

Register visitor						×
Registration of a single v	risitor.					
Check in Visitor da	ta					
Appointment data						
Topic	Software training]
Start	Jul 18, 2021	15:30	End]
Location						
Branch *	Headquarter	i	Precise location	Training rooms	_//	
Employee responsible *	Jessica Davis	_/				
Pick-up requested	🔾 Yes 💿 No					

	Cancel
--	--------

Fig.: 'Register visitor' dialog box, 'Visitor data' tab

- 1. Fill out the fields on the Visitor data tab accordingly.
- 2. Click OK.

Result

The file is created in the // Visitor management // Visitors // [Year] // [Month] folder.

The form contains the entered information.

The visitor's folder also appears under // Visitor management // Visitors by deadline // Recent visitors.

The visitor is checked in.

If you checked the *Create new contacts* box, the contact information is filed to the *Visitor contacts* folder, where you can edit it or enter additional data.

Outlook

You can create a visitor badge.

If you requested a document to be signed, you will find it in the Tasks area of the selected ELO user account. The visitor can complete the questionnaire and/or sign the document using a tablet. The signed document is saved to their visitor file.

On the day of the appointment, you can check visitors back out using the Check out visitor function.

Register group

Information

You can check in a group on the day of an appointment without pre-registering them. At the end of this process, the group is checked in.

Alternative

<u>Pre-register group</u>: If the group appointment will take place in the future, use this function.

Method

1. On the ribbon, go to the New tab and click Visitor > Register group.

Regi	ter group							×
Regi	stration of a	visitor group.						
Chec	kin Vi	sitor data	or data					
Grou	р							
Gro	up name *	John's Plumbing		Category	CR - Craftspe	rsons		
Arri	val*	Jul 12, 202	21					
Ch	eck in vis	itor						
Ļ	Arrival	First name	Last name	Company	License plate	E-mail	Telephone	
✓	09:05	Henry	Carter	John's Plumbing				×
		Employee responsible	□ Internal employee □ checked in					
<	09:05	Julie	King	John's Plumbing				×
		Employee responsible	Internal employee	checked in				
	09:05	Emma	Lancaster	John's Plumbing				×
		Employee responsible	Internal employee	checked in				
<	09:05	John	Smith	John's Plumbing		John@John.com		×
		Employee responsible	Internal employee	checked in				
	Add vis	itor						

OK Cancel

Fig.: 'Register group' dialog box, 'Check in' tab

In the *Register group* dialog box, you will find the input fields for checking in the group on two tabs.

Mandatory fields are marked with a red asterisk.

Fields with a pencil icon contain keyword lists. When you enter a value in the respective field, matching list entries appear.

1. Fill out the fields on the *Check in* tab accordingly.

Check in visitor: Before the name of each group member, you will find a check box that is automatically checked. If a member of the group is running late but has already been added to the list, you can uncheck this box for now. To check them in later, you can use the Check in visitor function.

Register group					×
Registration of a visitor gro	up.				
Check in Visitor data					
Appointment data					
Торіс	Sanitary facilities				
Start	-:	End	III	;	
Location					
Branch *	Headquarter 📰	Precise location	Sanitary facilities	_//	
Employee responsible *	Administrator 🥒				
Pick-up requested	🔾 Yes 🔎 No				
Save	t			ОК	Cancel

Fig.: 'Register group' dialog box, 'Visitor data' tab

1. Fill out the fields on the Visitor data tab accordingly.

2. Click OK.

Result

The file is created in the // Visitor management // Visitors // [Year] // [Month] folder.

The form contains the entered information.

The visitor's folder also appears under // Visitor management // Visitor groups by deadline // Recent groups.

The group is checked in.

Outlook

If you haven't checked a group member in yet, you can do this with the Check in visitor function.

You can add visitor pictures, create visitor badges, and request signatures.

On the day of the appointment, you can check the group back out using the Check out visitor function.

New long-term badge

Information

A long-term badge is a badge that allows bearers to check in and out using the Self-service functions in the client or intranet. With the physical badge, visitors can check in and out via a code scanner.

Method

1. On the ribbon, go to the *New* tab and click *Visitor > New long-term badge*.

New long-term badge								×
Create a new long-term ba	dge.							
Long-term badge data	Documents							
Validity								
Valid from *	Aug 1, 2021		Valid until *	Jun 30, 2022				
Location								
Branch *	Headquarter	:=	Precise location	Ground floor	_//			
Employee responsible *	Daniel Cooper	_//						
Pick-up requested	○ Yes ○ No							
Personal information								
Contact ID	CCOND0000022	_//	Company	Contelo AG	_//			
First name *	Elena	_//	Last name *	Rodriguez	_//			
Phone number	+44 (0) 711 7090668529 -11		E-mail	e.rodriguez@contelo.com				
ELO user name	Elena Rodriguez	_//	Internal employee					
Category	EM - Employee	:=						
Contact management								
New visitors are automatic over and offered for autocc	ally created in the contact manager if th omplete in the future.	e following	option is enabled. The da	ata in the form is taken				
	Create new contacts							
					_	_		
Save Prir	nt				0	K	Cancel	

Fig.: 'New long-term badge' dialog box, 'Long-term badge data' tab

In the *New long-term badge* dialog box, you will find the input fields for creating a long-term badge on two tabs.

Mandatory fields are marked with a red asterisk.

Fields with a pencil icon contain keyword lists. When you enter a value in the respective field, matching list entries appear.

Fill out the fields on the Long-term badge data tab accordingly.

Contact reference: If the user is already created as a reference, they have a contact reference that you can select from the suggestions. Otherwise, the field is left blank.

ELO user name: Complete this field so that the user can check in and check out on their client. Otherwise, they can only check in and out via a scanning device.

Create new contacts: If you select this option, a contact reference is automatically created and the entered visitor information is saved. The next time you log on, you can access the saved data and don't have to enter it again.

New long-term badge			×
Create a new long-term badge.			
	cuments tor badge after checking in the visitor		
Clea	ar file		
Document for signing			
Document	Health survey		
Send to	Signature Device		
Create visitor badge			
The visitor badge is created aut	omatically and filed to the folder of the long-term badge as a PDF.		
	Create badge immediately		
Save Print		ОК	Cancel

Fig.: 'New long-term badge' dialog box, 'Documents' tab

1. Fill out the fields on the *Documents* tab accordingly.

Take a picture/Select a file: You can take a picture using a webcam or select a picture from your file system.

Document: If you want the visitor to sign a document on arrival, select the document here.

Send to: The document selected under *Document* is sent to the user account that you select in this field. The selected user account should be accessed via a mobile device in order to be able to have the document signed.

Create badge immediately: You can create a long-term badge when creating the folder. Alternatively, you can use the Create visitor badge function later. Without the badge, the user can only use the self-service functions in the client or intranet.

1. Click OK.

Result

The long-term badge is filed to // Visitor management // Long-term badges.

The form contains the entered information.

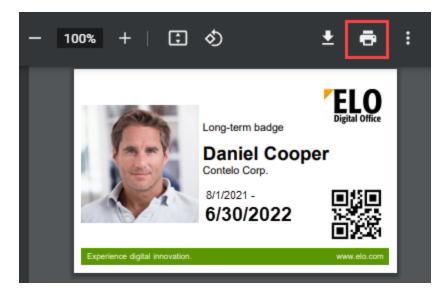
The user can now check themself in and out via the self-service functions.

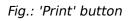
Outlook

If you have disabled the option *Create badge immediately*, you can create a badge using the Create visitor badge function.

Long-term badges can be printed using commercial badge printers with Windows printer drivers.

In the ELO Web Client, you can use the browser print function.





You can also press the *Print* button.

All long-term badges include a barcode or a QR code. With this code, the bearer of the long-term badge can check in and out at a scanning device.

If you requested a document to be signed, you will find it in the Tasks area of the selected ELO user account. The visitor can complete the questionnaire and/or sign the document using a tablet. The signed document is saved to their visitor file.

You can disable the long-term badge using the Deactivate long-term badge function, for example if the user has lost their long-term badge.

Create visitor list

Information

You can create a list of all visitors checked in or out at any time.

Method

1. On the ribbon, go to the New tab and click Visitor > Create visitor list.

Create visitor list					×
Select the options to	create a visitor list.				
Template	Current visitors	II			
Database					
Start date	Jul 7, 2021		End date	Jul 7, 2021	
Status	CI - Checked in	_//	Category	_/	
Branch	Headquarter	_0			
Save	Print			OK Cance	

Fig.: 'Create visitor list' dialog box

1. In the *Create visitor list* dialog box, select which visitors the list should include.

Category: Leave this field blank if you want the list to contain all categories of visitors.

1. Click OK.

Result

The visitor list is filed to // Visitor management // Visitor lists.

'Visitor' tab

The functions on the *Visitor* tab apply to a visitor or visitor group. They are only enabled when you select a visitor folder in the repository.

You will learn how to check visitors in in the chapter 'New' tab.

Create visitor badge

Information

Before the appointment or at the beginning of the appointment, you can create a visitor badge. If you want to add a picture to the visitor badge, use the <u>Add visitor picture</u> function.

Requirements

The visitor must be registered. They cannot already be checked in.

Method

1. In the dashboard or repository, select the folder of the visitor you want to create a visitor badge for.

If you want to create visitor badges for a group, select the group folder. You can also create a visitor badge for an individual member of a group by selecting this member only.

1. On the ribbon, go to the *Visitor* tab and click *Create visitor badge*.

Result

The visitor badges for a group are filed to the group folder. The visitor badge for an individual visitor is filed to their folder.

Outlook

Visitor badges can be printed using commercial badge printers with Windows printer drivers.

In the ELO Web Client, you can use the browser print function.

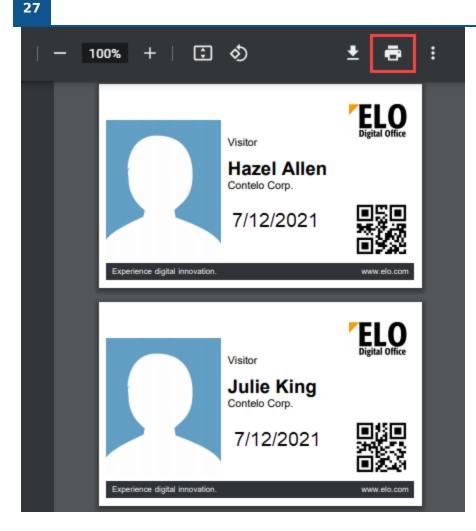


Fig.: 'Print' button

You can also press the *Print* button.

All visitor badges include a barcode or a QR code. You can use this code to check visitors in or out using a scanner device. Depending on the administrative settings, visitors can also complete these tasks themselves. This is especially practical for appointments spanning multiple days.

Add visitor picture

Information

After registering a visitor, you can upload a picture from the file system, or take a picture with the webcam during check-in.

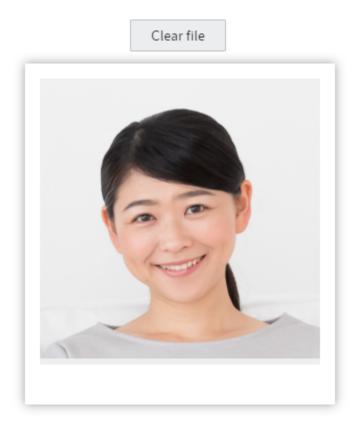
Method

1. In the dashboard or repository, select the file of the visitor whose visitor photo you want to capture.

For groups, you have to use the individual visitor files. Go straight to the file of the person you want to take a picture for, then repeat the entire process for each visitor.

On the ribbon, go to the Visitor tab and click Add visitor picture.





Save	Print	ОК	Cancel

Fig.: 'Add visitor picture' dialog box

In the *Add visitor picture* dialog box, a live preview appears right in the dialog box if a webcam is connected.

Take a picture/Select a file: You can take a picture of the visitor using a webcam or select a picture from your file system.

1. Click OK.

Result

The picture is saved to the visitor's file.

Outlook

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The picture is automatically used when creating a visitor badge using the <u>Create visitor badge</u> function.

Request signature

Information

You can request signatures from visitors. During check-in, visitors can complete a questionnaire and/or provide a signature using a mobile device.

Requirements

A document has been created for signing.

Method

- 1. In the dashboard or repository, select the file of the visitor you want to have sign a document. This can be an individual visitor or a member of a group, but not an entire group.
- 2. On the ribbon, go to the *Visitor* tab and click *Request signature*.

Request signature			×
Capture a signature for the	selected user and document.		
Document for signing			
Document *	Health survey	II	
Send to *	Signature Device	II	
Save Print	t	OK Cancel	

Fig.: 'Request signature' dialog box

1. In the *Request signature* dialog box, select the document you want the visitor to sign.

Send to: The document selected under *Document* is sent to the user account that you select in this field. The selected user account should be accessed via a mobile device in order to be able to have the document signed.

1. Click *OK*.

Result

The document is sent to the ELO user account that you selected under Send to.

Outlook

The visitor can complete the questionnaire and/or sign the document using a tablet. The signed document is saved to their visitor file.

Cancel registration

Information

You can cancel registration for pre-registered visitors as long as they haven't been checked in. You can cancel registration for individual visitors, entire groups, or individual group members.

Method

1. In the dashboard or repository, select the file of the visitor whose pre-registration you want to cancel.

If you want to cancel an entire group, select the group folder. If you want to cancel a member of a group, select the folder of the group member.

1. On the Visitor tab, click Cancel registration.

Cancel registration	

Cance	l a pre	e-regis	tered	visit.
-------	---------	---------	-------	--------

Cancer a pre-registered visit						
Warning: The registration wi	ill be canceled. Changes will not b	e possible after	wards.			
Reason for cancellation *	Reason not provided					
Appointment data						
Торіс	Software training					
Start	Jul 24, 2021	09:00	End	Jul 26, 2021	17:00	
Location						
Branch	Headquarter		Precise location	Academy		
Employee responsible	Jessica Davis					
Pick-up requested	🔾 Yes 🔘 No					
Personal information						
Contact ID	CCON000002		Company			
First name	Peter		Last name	Green		
Phone number			E-mail	PeterGreen@email.com		
ELO user name			Internal employee			
Category	VI - Visitor					
Save Print	t				ОК	Cancel

Fig.: 'Cancel registration' dialog box

- 1. In the *Cancel registration* dialog box, enter a reason for cancellation.
- 2. Click OK.

Result

The pre-registration is canceled.

Check in visitor

Information

On the day of the visit, you check the visitor in. You can check in individual visitors, an entire group or company, or individual members of a group.

Alternatives

Register visitor: If you want to check in a visitor who hasn't already been registered, use this function.

Register group: If you want to check in a group that hasn't already been registered, use this function.

Requirements

The visitor has to be registered for the day. If you use the function for a visitor that is not registered for the day, a copy of the visitor file is created for the current day.

Method

1. In the dashboard or repository, select the file of the visitor you want to check in.

If you want to check in an entire group, select the group folder. Even if you don't want to check in all group members, select the folder. You can exclude individual group members.

1. On the ribbon, go to the *Visitor* tab and click *Check in visitor*.

The dialog boxes differ depending on whether you are checking in a visitor or a group. For this reason, they are described separately in the following.

Check in visitor

Check in visitor		×
Marks the arrival of th	he selected visitor.	
Check in Visitor of	data	
Visit data		
Arrival *	Jul 7, 2021 🗰 09:50 Departure	
Arrival by	T - Train	
Visitor picture		
Document for signing		
Document	Health survey	
Send to	Signature Device	
Save	Print OK Car	ncel

Fig.: 'Check in visitor' dialog box, 'Check in' tab

In the *Check in visitor* dialog box, the *Visitor data* tab is already filled with the data from preregistration.

Information

If visitors appear too far in advance for their pre-registered appointment, the information under *Appointment data* will not be applied. ELO assumes that this is a separate appointment. Check-in is treated as registration.

The arrival time is automatically completed on the Check in tab.

1. Fill out the fields on the *Check in* tab accordingly.

Take a picture/Select a file: You can take a picture of the visitor using a webcam or select a picture from your file system.

Document: If you want the visitor to sign a document on arrival, select the document here.

Send to: The document selected under *Document* is sent to the user account that you select in this field. The selected user account should be accessed via a mobile device in order to be able to have the document signed.

Marks the arrival of the selected vision of t	isitor.			
Appointment data				
Topic Softw	vare training			
Start	Jul 19, 2021 📰 10:00	End	Jul 19, 2021	16:00
Location				
Branch * Heado	quarter 🧾	Precise location	Training rooms	_0
Employee responsible * Jessic	ca Davis _			
Pick-up requested O Yes	s 💿 No			
Personal information				
Contact ID	-	Company		_//
First name * Cassa	andra _	Last name *	Scott	_//
Phone number		E-mail		
ELO user name	-	Internal employee		
Category VI - Vi	isitor			

Print	
-------	--

Fig.: 'Check in visitor' dialog box, 'Visitor data' tab

The information on the *Visitor data* tab was entered during pre-registration. You can edit it if necessary.

1. Click OK.

Result

The visitor is checked in.

Outlook

You can create a visitor badge.

If you requested a document to be signed, you will find it in the Tasks area of the selected ELO user account. The visitor can complete the questionnaire and/or sign the document using a tablet. The signed document is saved to their visitor file.

On the day of the appointment, you can check the visitor back out using the *Check out visitor* function.

Check in visitor × Check in one or multiple visitors within a group Visitor data Check in Group VI - Visitor iΞ Group name * Local High School Category Arrival * Jul 7, 2021 **Check in visitor** Arrival First name Last name Company License plate E-mail Telephone ✓ 10:01 Sandy _0 Baker _0 Local High Schoc Sandy@Baker.co Employee responsible Internal employee checked in 10:01 ~ Leon Cox Local High Schoc _0 _0 Employee responsible Internal employee checked in ✓ 10:01 Max Howard Local High Schoc _0 _0 Employee responsible Internal employee checked in ~ 10:01 Pedro Lopez Local High Schoc Perdo@Lopez.co _0 _0 Internal employee Employee responsible checked in 10:01 ~ O'Brien Irving _0 _0 Local HighSchoo Employee responsible Internal employee checked in Save Print Cancel

Check in group

Fig.: 'Check in visitor' dialog box, 'Check in' tab

In the *Check in visitor* dialog box, the *Visitor data* tab is already filled with the data from preregistration. You can edit it if necessary.

Information

If visitors appear too far in advance for their pre-registered appointment, the information under *Appointment data* will not be applied. ELO assumes that this is a separate appointment. Check-in is treated as registration.

Check in visitor: Before the name of each group member, you will find a check box that is automatically checked. If you don't want to check in a member of the group yet, you can uncheck this box for now. To check them in later, use the <u>Check in visitor</u> function.

Checked in: This option is not active in *Visitors*. The box is automatically checked as soon as you check the visitors in.

Result

The group members are checked in.

If not all members of the groups are present, the group folder remains grayed out.

Information

The status of the entire group does not change to *CI – checked in* until all members have been checked in.

Outlook

To check in additional group members, select the group again and then click *Check in visitor*.

You can create a visitor badge for all members of a group at once.

You can add a visitor picture and request a signature for individual group members.

If individual group members did not show up after all, you can <u>cancel their registration</u>.

At the end of the visit, use the <u>Check out visitor</u> function.

Check out visitor

Information

At the end of the appointment, you check visitors back out.

Alternative

Visitors with visitor badges can check themselves out using a scanning device.

Method

1.

In the dashboard or repository, select the folder of the visitor you want to check out.

If you want to check out an entire group, select the group folder. Even if you don't want to check out all group members, select the folder. You can exclude individual group members.

1. On the ribbon, go to the Visitor tab and click Check out visitor.

The dialog boxes differ depending on whether you are checking out a visitor or a group. For this reason, they are described separately in the following.

Check out visitor

Check out visitor				×
Check out a visitor wh	no is checked in.			
Visit data				
Arrival	Jul 9, 2021 09:55	Departure *	Jul 9, 2021	16:02
Location				
Branch	Headquarter	Precise location	Training rooms	_0
Visitor picture				
Save	Print			OK Cancel

Fig.: 'Check out visitor' dialog box

In the Check out visitor dialog box, the time of departure is entered automatically.

1. Click OK.

Result

The visitor is checked out.

Outlook

Visitors who have checked out can be <u>checked back in</u> at a later time.

Check out group

Chec	k out visitor					×	
Chec	k out one or	multipl	e visitors within a grou	ıp.			I
Арро	intment dat	a					
Тор	ic		Bathroom facilities				l
Star	t		Jul 12, 2021	:	End		l
Locat	tion						l
							l
Brai	nch		Headquarter		Precise location	Sanitary facilities	
Emp	oloyee respo	nsible	Jessica Davis				
Pick	-up requeste	d	🔾 Yes 🔍 No				l
Grou	D						l
	up name		John's Plumbing		Category	CR - Craftspersons	l
			John's Plumbing		Category	CR - Cranspersons	l
Dep	arture *		Jul 8, 2	2021			l
Ch	eck out vis	itor					l
\downarrow	Departure	First n	iame	Last name	Company	License plate	l
	05:00	Henr	у	Carter	John's Plumbing		l
		E	mployee responsible	Internal employee	checked in		l
	05:00	Julie		King	John's Plumbing		l
			mployee responsible	Internal employee	checked in		l
							l
	05:00	Emm	a	Lancaster	John's Plumbing		l
		E	mployee responsible	Internal employee	checked in		
	05:00	John		Smith	John's Plumbing		
	Save	Pr	int			OK Cancel	

Fig.: 'Check out visitor' dialog box

In the Check out visitor dialog box, the time of departure is entered automatically.

Check out visitor: Before the name of each group member, you will find a check box that is automatically checked. If you don't want to check out a member of the group yet, you can uncheck this box for now. To check them out later, use the *Check out visitor* function.

1. Click OK.

Result

The group is checked out.

Information

The group is not checked out until all members of the group have been checked out. Before this, only individual members of the group are checked out. If the group does not check out together, repeat this process until the entire group has been checked out.

Outlook

Visitors who have checked out can be <u>checked back in</u> at a later time.

Edit pre-registration

Information

After registration and before check-in, you can edit the visitor data via the *Edit registration* function.

Alternative

You can also edit the data via the form in the group or visitor folder.

Method

1. In the dashboard or repository, select the folder of the visitor whose pre-registration you want to edit.

If you want to edit an entire group, select the group folder. If you want to edit a member of a group, select the folder of the group member.

1. On the ribbon, go to the *Visitor* tab and click *Edit registration*.

In the Edit registration dialog box, you can edit all fields.

1. Click Save changes.

Result

The changes are applied.

Outlook

You can edit a pre-registration as many times as you'd like until the visitor has been checked in.

Deactivate long-term badge

Information

You can deactivate long-term badges you have access to. This is recommended if the visitor badge has been lost, for example.

Method

1.

In the dashboard or repository, select the folder of the long-term badge you want to deactivate.

Alternative: Select any visitor folder.

1. On the ribbon, go to the *Visitor* tab and click *Deactivate long-term badge*.

Deactivat	te long-term badge	×
?	Select long-term badge	
	Select the long-term badge to be deactivated	
	→ Cooper, Daniel (LTB#000001)	
	→ Davis, Jessica (LTB#000002)	
	→ Edwards, Jack (LTB#000006)	
	→ Smith, Adrian (LTB#000005)	
	_	
		Cancel

Fig.: 'Select long-term badge' dialog box

Optional: If you haven't selected the relevant long-term badge, select it in the *Select long-term badge* dialog box.

		Deactivate long-term badge									
Please enter a reason for deactivating the badge.											
Reason for deactivation * Lost v	visitor badge]							
Personal information											
Contact ID CCON	ND0000013	Company	Contelo Corp.]							
First name Jack	(Last name	Edwards]							
Phone number +44 (0	(0) 711 7090668529 -26	E-mail	j.edwards@contelo.com]							
ELO user name Jack B	Edwards	Internal employee									
Category EM - E	Employee										
Validity											
Valid from *	Aug 1, 2021	Valid until *	Jun 30, 2022								
Save Print				ОК	Cancel						

Fig.: 'Deactivate long-term badge' dialog box

1. In the *Deactivate long-term badge* dialog box, enter a reason for deactivating the badge.

2. Click OK.

Result

The long-term badge is deactivated. If the bearer of the long-term badge attempts to check in using the *Self check-in* function or at the front desk, they will get an error message indicating that check-in is not possible.

Outlook

It is not enough to create a new badge using the <u>Create visitor badge</u> function after deactivation, as this badge would have the same code as the one you just deactivated. Use the New long-term badge function instead.

Self-service

All employees with an ELO user account and long-term badge can check themselves in and out via the *Self-service* group.

Self check-in

Information

If a long-term badge has been created for you, you can check yourself in. You are then marked as present when an overview of present visitors is created.

Alternative

Scan your visitor badge if your company has set up a code scanner.

Method

1. On the ribbon, go to the *New* tab and click *Self-service > Self check-in*.

Self check-in				×
Check yourself in for	a visit.			
Visit data				
Arrival *	Jul 7, 2021 📰 10:28	Departure		:
Arrival by				
Location				
Branch	Headquarter	Precise location	Fourth floor	_0
Course	Detet		01/	Canad
Save	Print		ОК	Cancel

Fig.: 'Self check-in' dialog box

The time of arrival is automatically entered in the *Self check-in* dialog box.

Click OK.

Result

You are checked in.

Outlook

When you leave the building, check out with the <u>Self check-out</u> function.

Self check-out

Information

After you have entered the building and checked in using the *Self check-in* function or by scanning your long-term badge, you have to check back out when you leave the building.

Alternative

Scan your visitor badge if your company has set up a code scanner.

Method

1. On the ribbon, go to the *New* tab and click *Self-service > Self check-out*.

Self check-out				×
Check yourself out fro	om a visit.			
Visit data				
Arrival	Jul 7, 2021 10:28	Departure *	Jul 7, 2021 📰	10:30
Location				
Branch	Headquarter	Precise location	Fourth floor	_//
Save	Print		ОК	Cancel

Fig.: 'Self check-out' dialog box

The time of departure is automatically entered in the *Self check-out* dialog box.

1. Click *OK*.

Result

You are checked out.

Dashboard overview

The dashboard provides an overview of all visitor files, group folders, and their statuses.

You can reach the dashboard by clicking the Visitors and groups tile in the My ELO area.

The dashboard remembers your settings. When you exit then open the dashboard again, it remembers and displays your most recent view.

1											2		3	
Current	visitors	S						-				Q		^
	Visitor 38		Group 4	Checked in O	Registered 18	Checked out 19	Registration canceled	-5						-
Group ~	FirstnamY	Lastname `	 Status 	✓ Company Category	Start datY Start time	 End date 	✓ End time ✓	Arrival time:	Arrival date .::	Departure ti:	Departure d.::	Location .::	Responsible	
	Hazel	Allen	Checked out		Jul 7, 2021 07:51			07:51	Jul 7, 2021	07:52	Jul 7, 2021	Headquar	Administrator	
Group Co	Hazel	Allen	Registered	Contelo VI - Visitor	Jul 12, 20 14:00	Jul 12, 2021	16:00					Headquar	Jessica Davis	
Local Hig	Sandy	Baker	Registered	Local Hig VI - Visitor	Jul 14, 20 09:00	Jul 14, 2021	15:00					Headquar	Administrator	
Local Hig	Sandy	Baker	Checked out	Local Hig VI - Visitor	Jul 7, 2021			10:01	Jul 7, 2021	05:00	Jul 8, 2021	Headquar	Administrator	
Plumbing	Henry	Carter	Checked out	Plumbing CR - Craf.	Jul 12, 20			09:09	Jul 7, 2021	05:00	Jul 8, 2021	Headquar	Administrator	
Local Hig	Leon	Cox	Registered	Local Hig VI - Visitor	Jul 14, 20 09:00	Jul 14, 2021	15:00						Administrator	
Local Hig	Leon	Cox	Checked out	Local Hig VI - Visitor	Jul 7, 2021			10:01	Jul 7, 2021	05:00	Jul 8, 2021		Administrator	
	Noel	Durham	Checked out		Jul 7, 2021 07:57			07:57	Jul 7, 2021	07:58	Jul 7, 2021	Headquar	Administrator	

Fig.: Dashboard in the table view

The dashboard is divided into the following areas:

1 Database: In the dashboard header, use the drop-down menu (arrow icon) to select a database. A dashboard database is a list of visitor files and/or group folders that is loaded for evaluation.

Information

If there is only one database, this database is selected permanently and no drop-down menu is available.

2 Table/Calendar: You can choose between two dashboard views: Table and Calendar.

3 Search: In addition to text values, you can also search for number values. All data that you can select as column values in the position view serves as the basis.

Information

If you'd like to search for index fields that are not listed on the dashboard, use the general ELO search.

4 Visitors/Groups: You can either view visitors or groups.

Information

When checking in a group, the group members are created as individual visitors. The individual group members are therefore shown when you select the visitor view. If you choose the group view, the groups are only shown with the person responsible.

5 Status: The dashboard header contains a button for each visitor status. If a button is active, all visitors with the corresponding status are shown in the dashboard viewer pane.

6 Viewer pane: In the dashboard viewer pane, you will see a list of visitor files or group folders. This list changes depending on the filter criteria applied.

Minimized view

									1	
	Current	visitors	S							1
2	II Key f	īgures 🖆	Visitor	3						•
	Group ~	Firstnam:	Lastname ~	Status	~	Company	Category:	Start dat	Start tir	=
	Local Hig	Sandy	Baker	Checked out		Local Hig	VI - Visitor	Jul 7, 2021		*
	Plumbing	Henry	Carter	Checked out		Plumbing	CR - Craf	Jul 12, 20		
	Local Hig	Leon	Cox	Registered		Local Hig	VI - Visitor	Jul 14, 20	09:00	
	•								÷	*

Fig.: Dashboard in minimized view

The dashboard automatically adjusts to the size of the browser window. Here, you see the view with a narrower width, where you can view either *Key figures* or *Visitor*.

1 Menu: You can hide and show the *Key figures* and *Visitor* as well as the free text search via the menu.

2 Key figures: Choose Key figures to view or change the status of the displayed visitors or groups.

3 Visitor: Select *Visitor* to show the visitors either in a table or calendar.

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Group ~	Firstnam Y	Lastname ~	Status ~	Company	Category.::	Start dat	Start time ~	End date	 End time 	✓ Arrival time	Arrival date .::	Departure ≡
Local Hig	Sandy	Baker	Checked out	Local Hig	VI - Visitor	Jul 7, 2021				10:01	Jul 7, 2021	05:00
Plumbing	Henry	Carter	Checked out	Plumbing	CR - Craf	Jul 12, 20				09:09	Jul 7, 2021	05:00
Local Hig	Leon	Cox	Registered	Local Hig	VI - Visitor	Jul 14, 20	09:00	Jul 14, 2021	15:00			
Local Hig	Leon	Cox	Checked out	Local Hig	VI - Visitor	Jul 7, 2021				10:01	Jul 7, 2021	05:00
	Noel	Durham	Checked out			Jul 7, 2021	07:57			07:57	Jul 7, 2021	07:58
	Christine	Evans	Registered		VI - Visitor	Jul 24, 20	09:00	Jul 26, 2021	17:00			
	Peter	Green	Registration canceled		VI - Visitor	Jul 14, 20	10:00	Jul 26, 2021	17:00			
Local Hig	Max	Howard	Registered	Local Hig	VI - Visitor	Jul 14, 20	09:00	Jul 14, 2021	15:00			

Fig.: Table view

Clicking an entry shows its preview. Double-clicking an entry brings you to the repository.

Customize the table view using the drop-down menus.



Fig.: Customizing the table view

The drop-down menus in the column headings contain the following functions:

- Sort ascending
- Sort descending
- Remove sorting: This option appears if you have sorted the column.

Alternative: You can sort the column by clicking the column heading. Clicking once sorts in ascending order. Clicking a second time sorts in descending order. Clicking a third time clears sorting.

- Hide column: The selected column is no longer shown in the table view.
- Group: The content of a column is joined into groups. The number of visitor files in each group is shown in brackets. Click the plus icon before the group to expand it and view all contained visitor files. The minus icon minimizes it again. Clicking the plus icon in the header expands all groups.

Information

You can combine multiple groups. You can specify a hierarchy with the order in which you select the columns.

• Ungroup: This option appears if you have grouped items. Click Ungroup to discard the group.

✓ Arrival time	Arrival date:	Departure \equiv
Reset grouping		^
Columns:		
✓ Group		
✓ Firstname		
✓ Lastname		
✓ Status		
 Company name 	9	
✓ Category		
✓ Start date		
✓ Start time		
✓ End date		
✓ End time		-

Fig.: Overview of all columns

Menu: You can show hidden columns. Clicking the *Reset grouping* button resets all groups.

Calendar

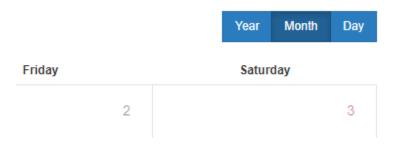


Fig.: 'Year', 'Month', and 'Day' buttons

The calendar offers three options: Year, Month, and Day.

Data from the visitor file is shown in all views.

ay	Year Month	21	C Today > 2021					
il	Aj	March	February	January				
it	Aug	58 July	June	Мау				
er.	Decemt	November	October	September				

Fig.: Annual view

Year: The annual view shows the number of appointments each month. For more detailed information on a month, click the month.

4	5	6	18 7	8	0	9
Checked out 07:55 L Mason, I	Kelsey				·	

Fig.: Month view

Month: The month view shows the number of appointments each day. For more detailed information on a day, click the day.

To preview a visitor file, click the date.

< 1	īoday 📏			Wednesday, 7. July 2021													Year N	Year Month Day		
Group ~	Firstname.X	Lastname 👻	Status ~	Company	Category	Start date	Start time	~	End date	×	End time ~	Arrival time:	Arrival date	Departure ti:	Departure d.::	Location \checkmark	Responsible	Ý	≡	
	Hazel	Allen	Checked out			Jul 7, 2021	07:51					07:51	Jul 7, 2021	07:52	Jul 7, 2021	Headquarter	Administrator		Â	
Local Hig	Sandy	Baker	Checked out	Local High	VI - Visitor	Jul 7, 2021						10:01	Jul 7, 2021	05:00	Jul 8, 2021	Headquarter	Administrator			
Plumbing	Henry	Carter	Checked out	Plumbing	CR - Craft	Jul 12, 2021						09:09	Jul 7, 2021	05:00	Jul 8, 2021	Headquarter	Administrator			
Local Hig	Leon	Cox	Checked out	Local High	VI - Visitor	Jul 7, 2021						10:01	Jul 7, 2021	05:00	Jul 8, 2021		Administrator			

Fig.: Day view

Day: The day view lists the appointments for the selected day. It works in the same way as the table view.

Contact management

You can save companies and contacts to speed up the process of creating new visitors. If you select a contact when creating a visitor, the data stored for this contact is automatically entered to the correct fields.

When creating a visitor, you can save the contact you have entered or use the following functions on the ribbon via *New > Contacts*:

- New contact list
- New company
- New contact

Create overview of contacts

To get an overview of your contacts, use the Create overview of contacts function.

Create contact label

Use the Create contact label function to create a label with QR code for the selected contact.

The label is filed to the contact folder.

The label contains information on the contact as well as a QR code. If you print the label using a label printer and file it to a physical folder, mobile end devices will take you straight to the digital folder by scanning the QR code.

If you want to use the *Print document* function in the ELO Java Client, you will have to set the label printer as the default printer in Windows.

You can also select the label printer as the default printer for faxes in the ELO Java Client configuration and print using the *Fax document* function.