Business Solution ELO Visitor

Business Solution ELO Visitor 1.06

Table of contents

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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

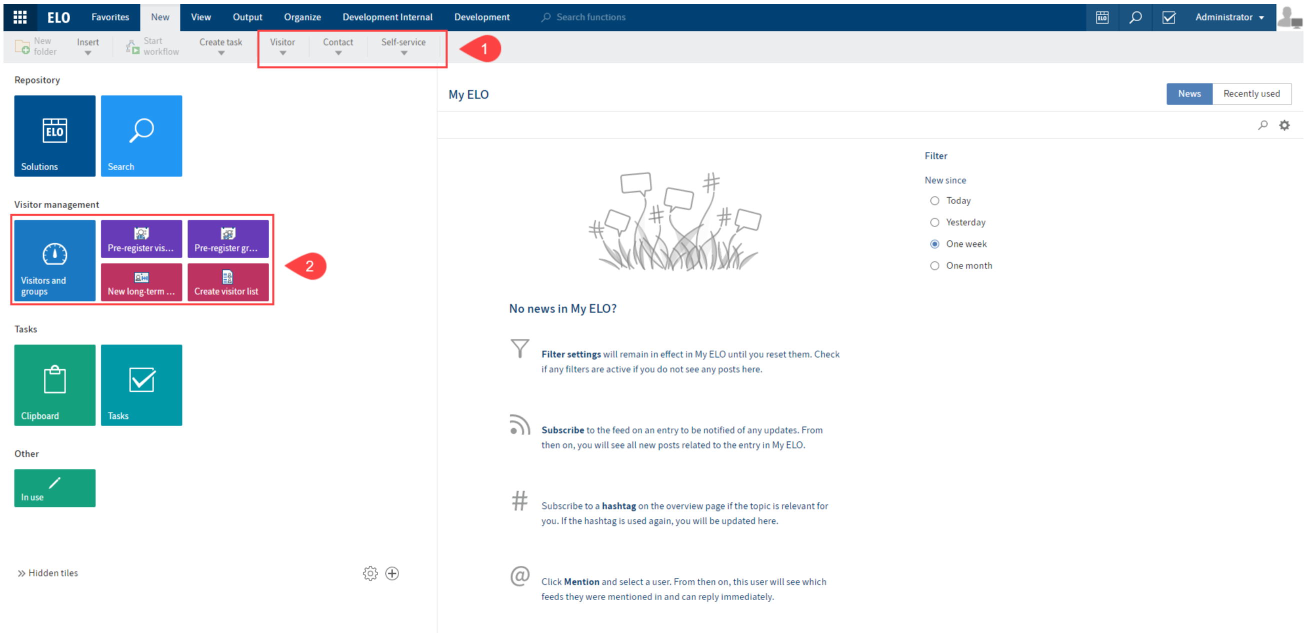


Fig.: Business Solution ELO Visitor program interface

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*.

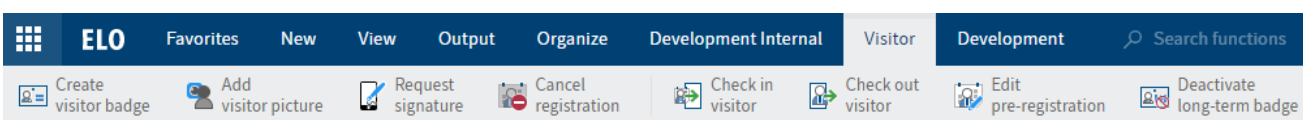


Fig.: 'Visitor' tab

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

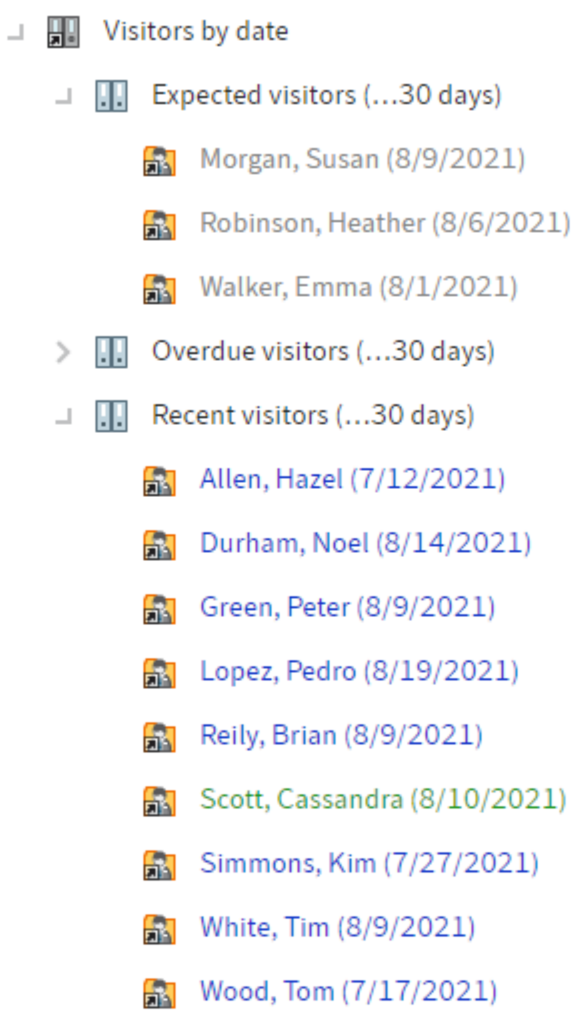


Fig.: Dynamic folder in the repository

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

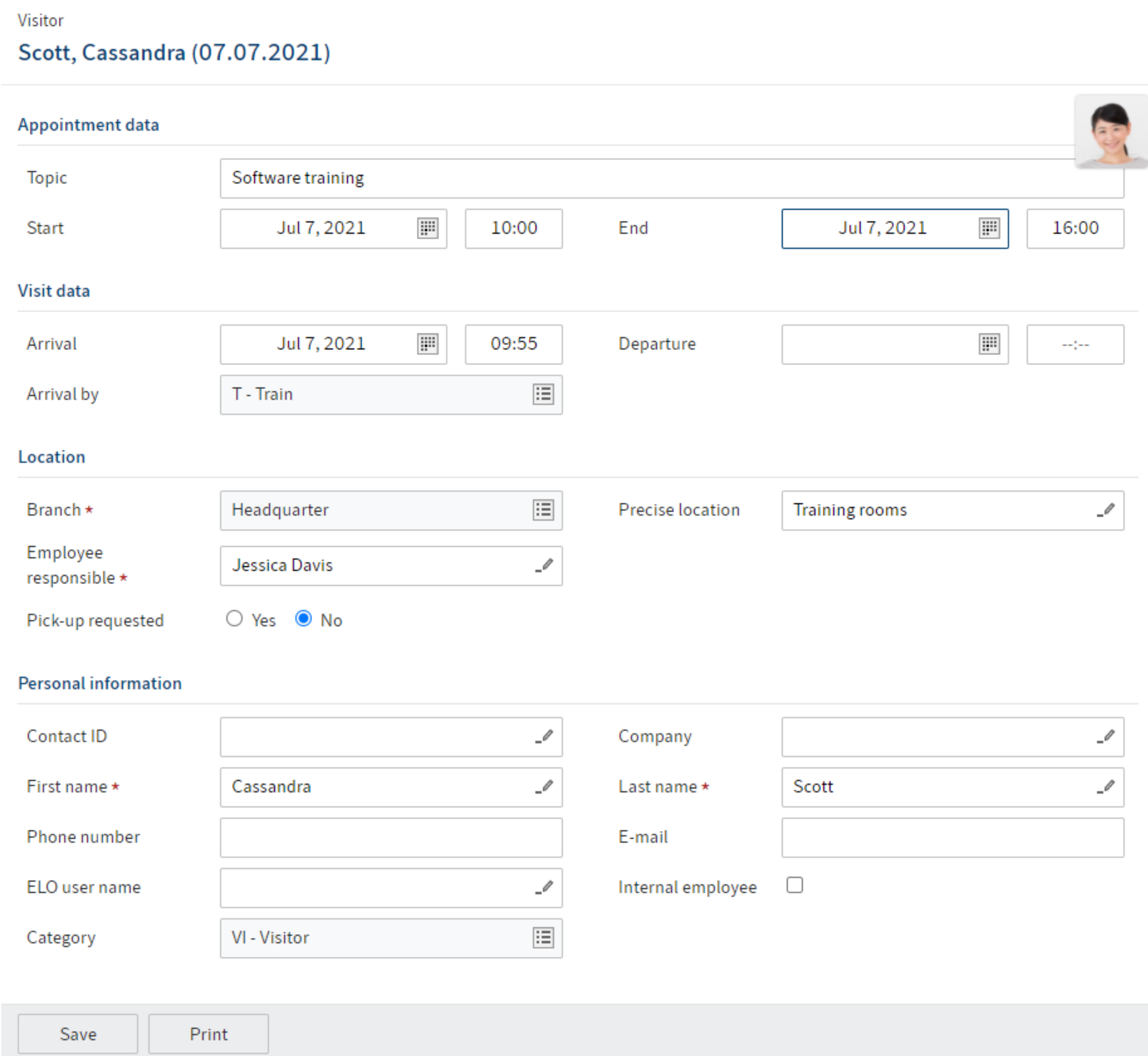


Fig.: 'Visitor' form

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

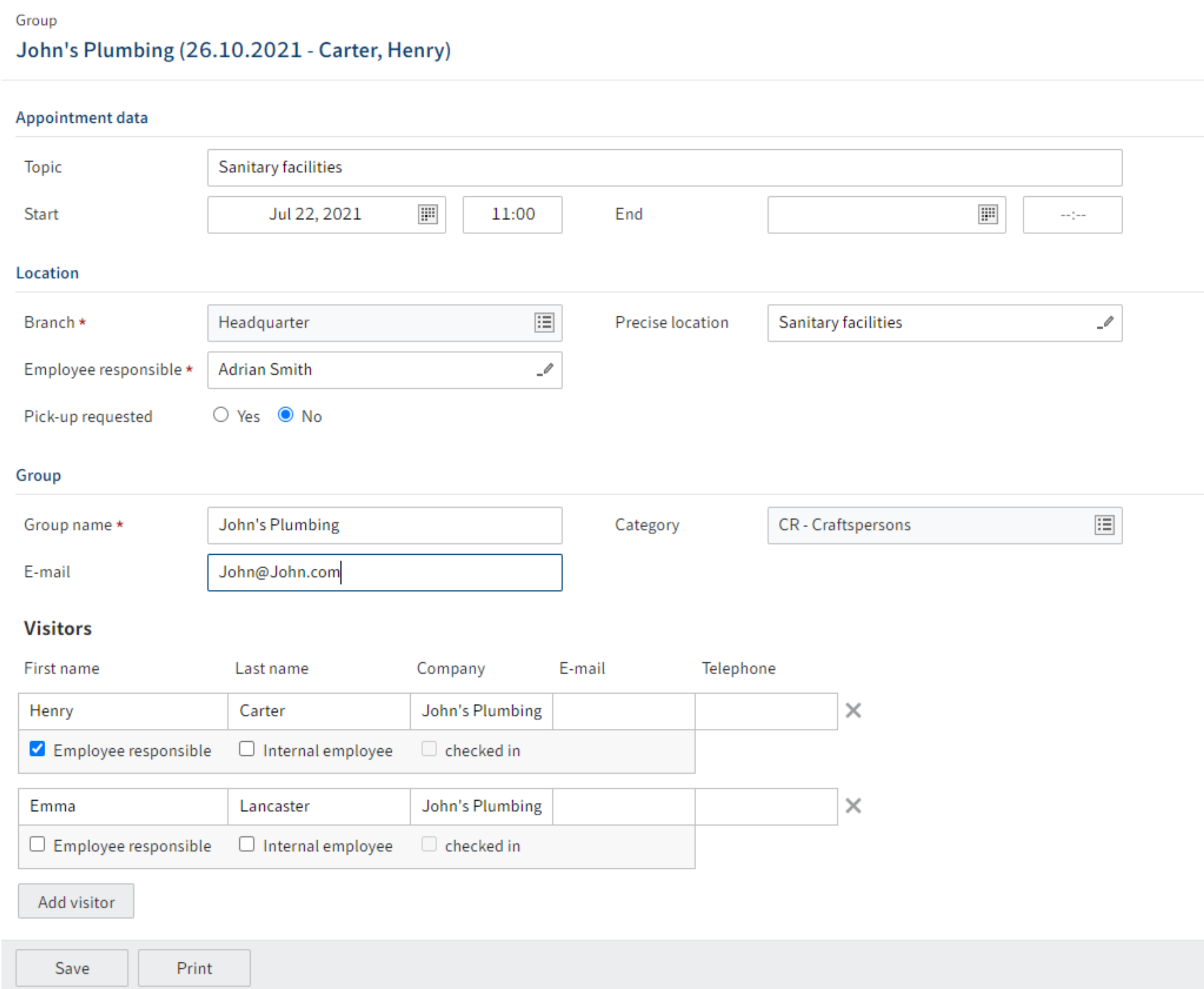


Fig.: 'Group' form

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

Register visitor: 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*.

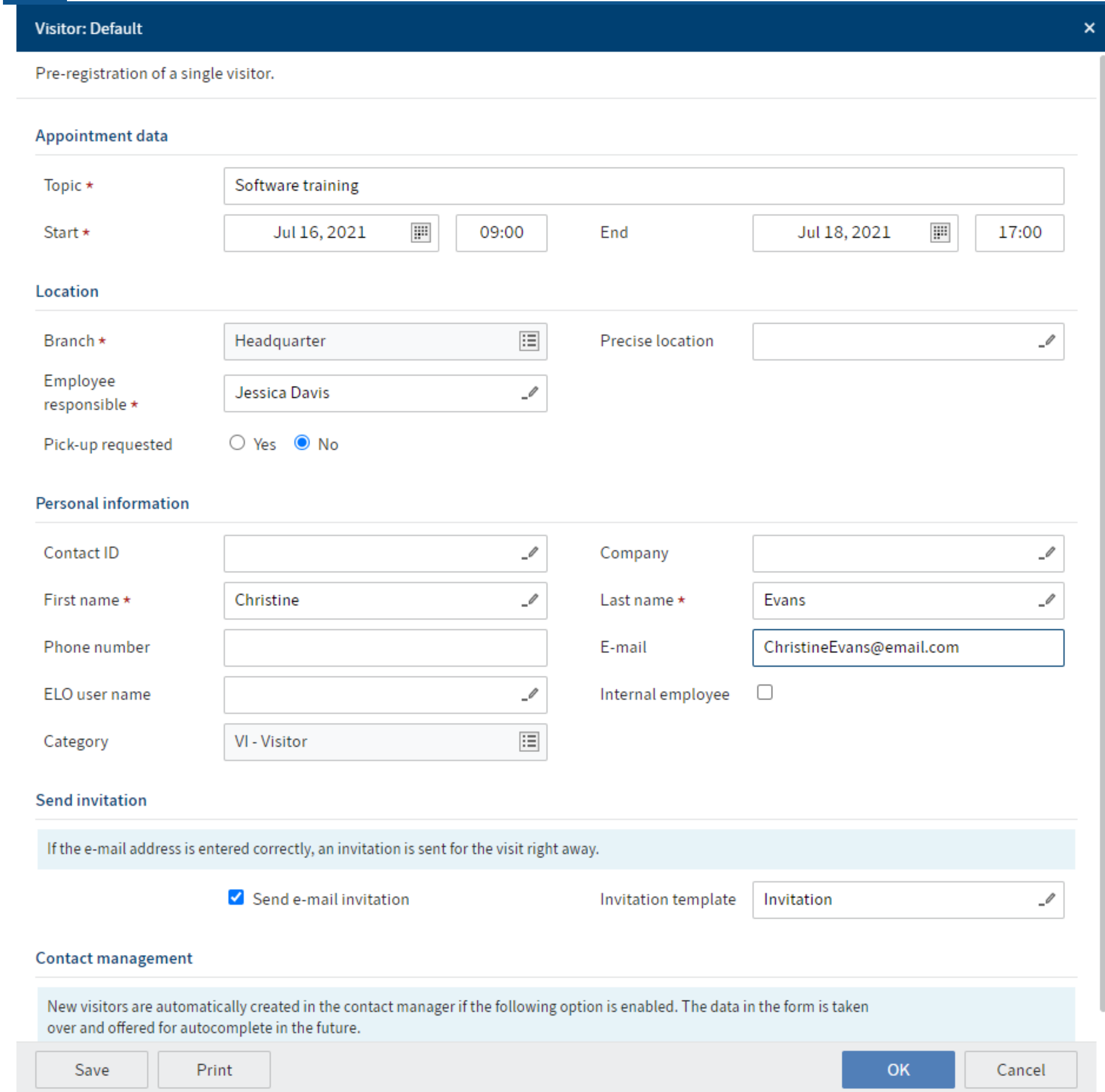


Fig.: 'Visitor' dialog box

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

Pre-register company: 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

1.

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

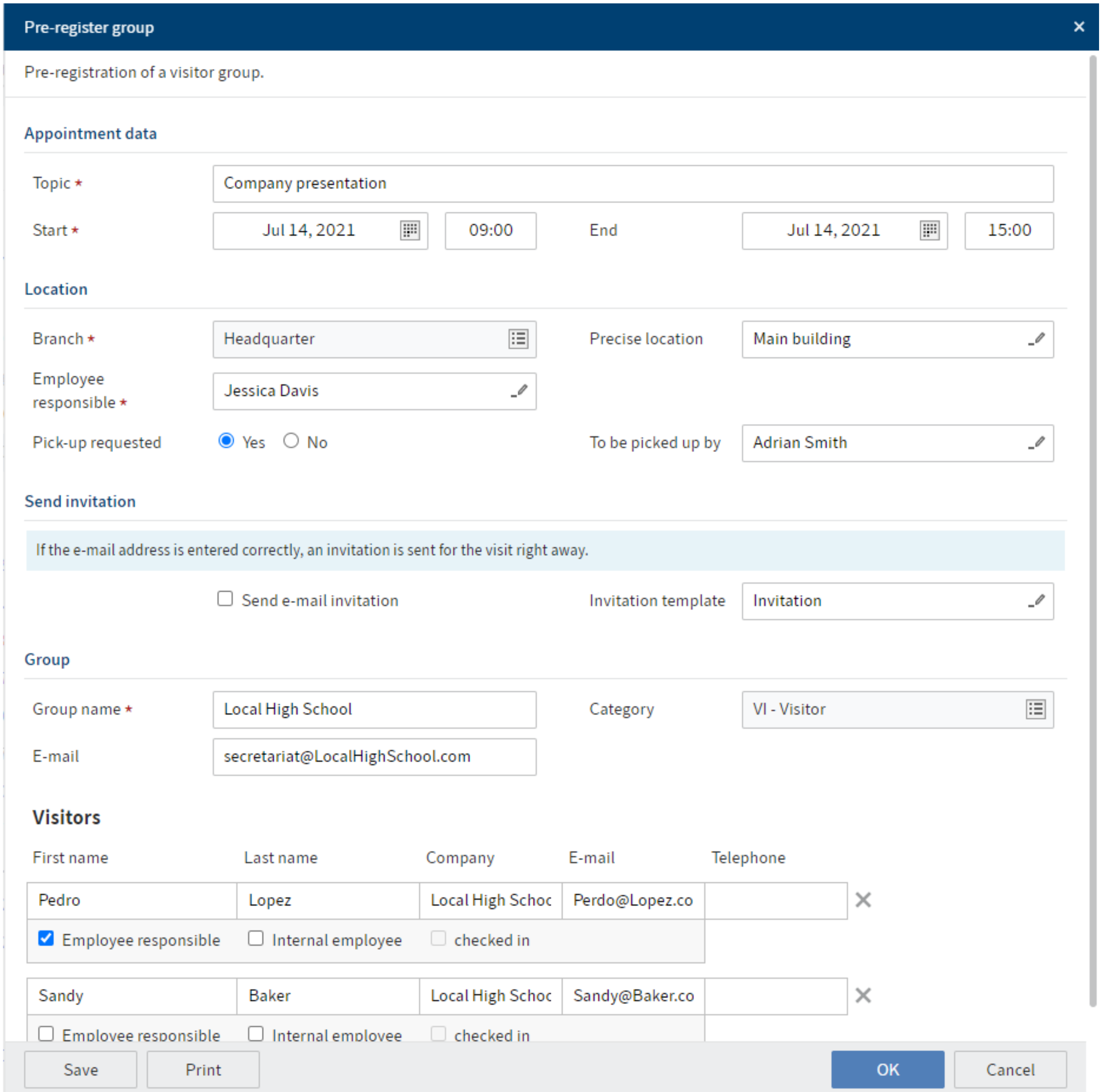


Fig.: 'Pre-register group' dialog box

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 pre-registration 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

Pre-register group: 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*.

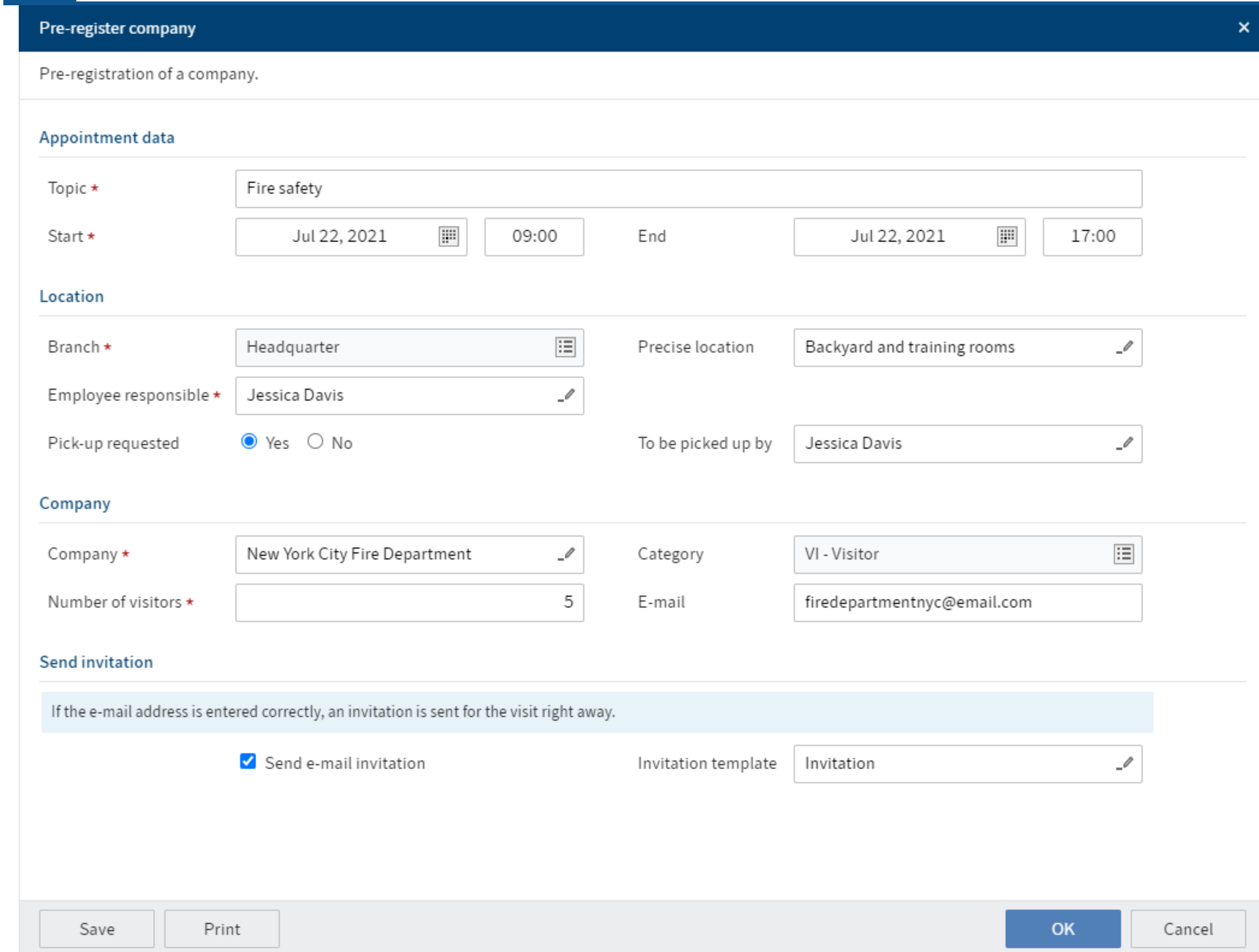


Fig.: 'Pre-register company' dialog box

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 pre-registration 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

Pre-register visitor: 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*.

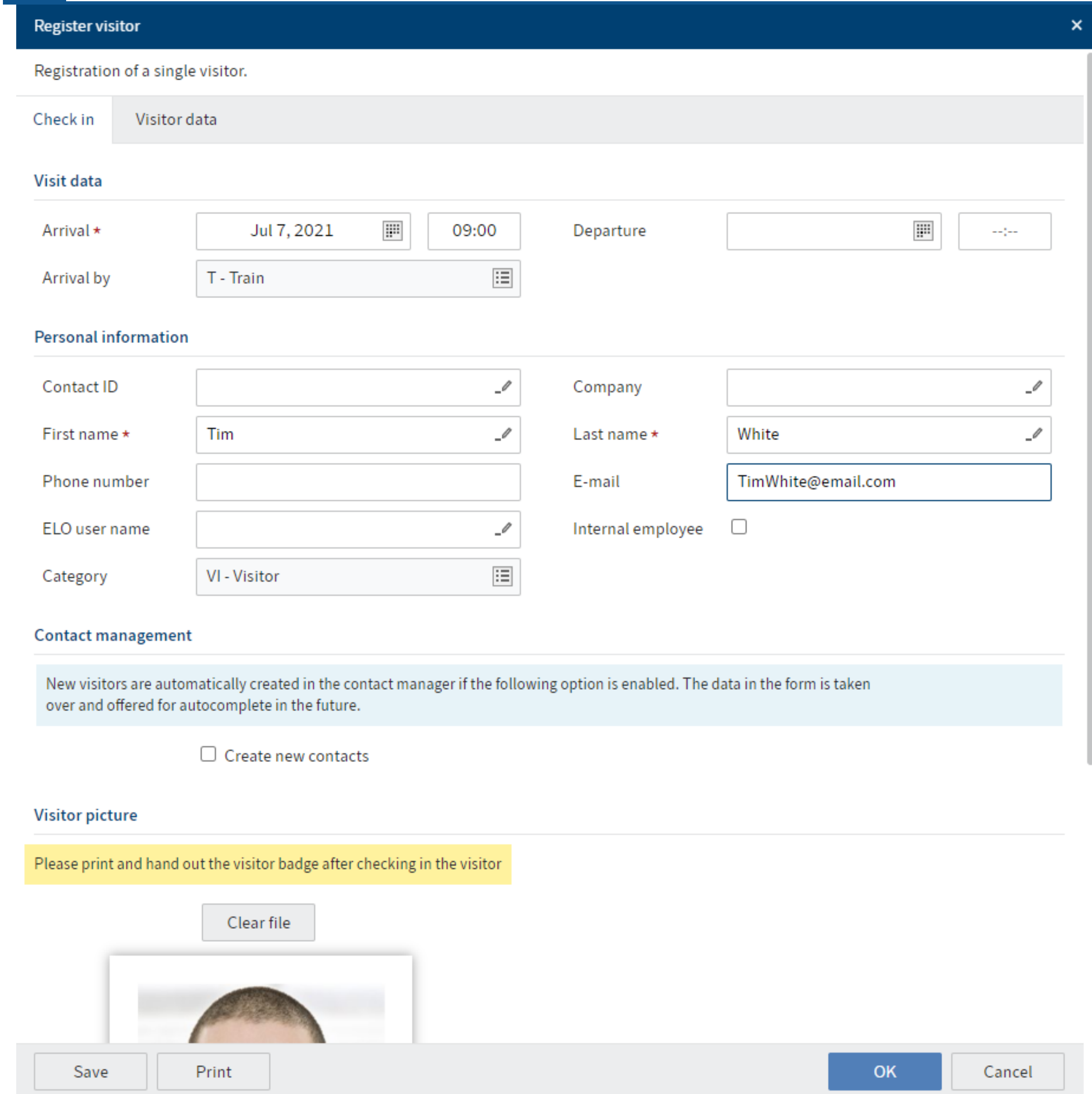


Fig.: 'Register visitor' dialog box

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.

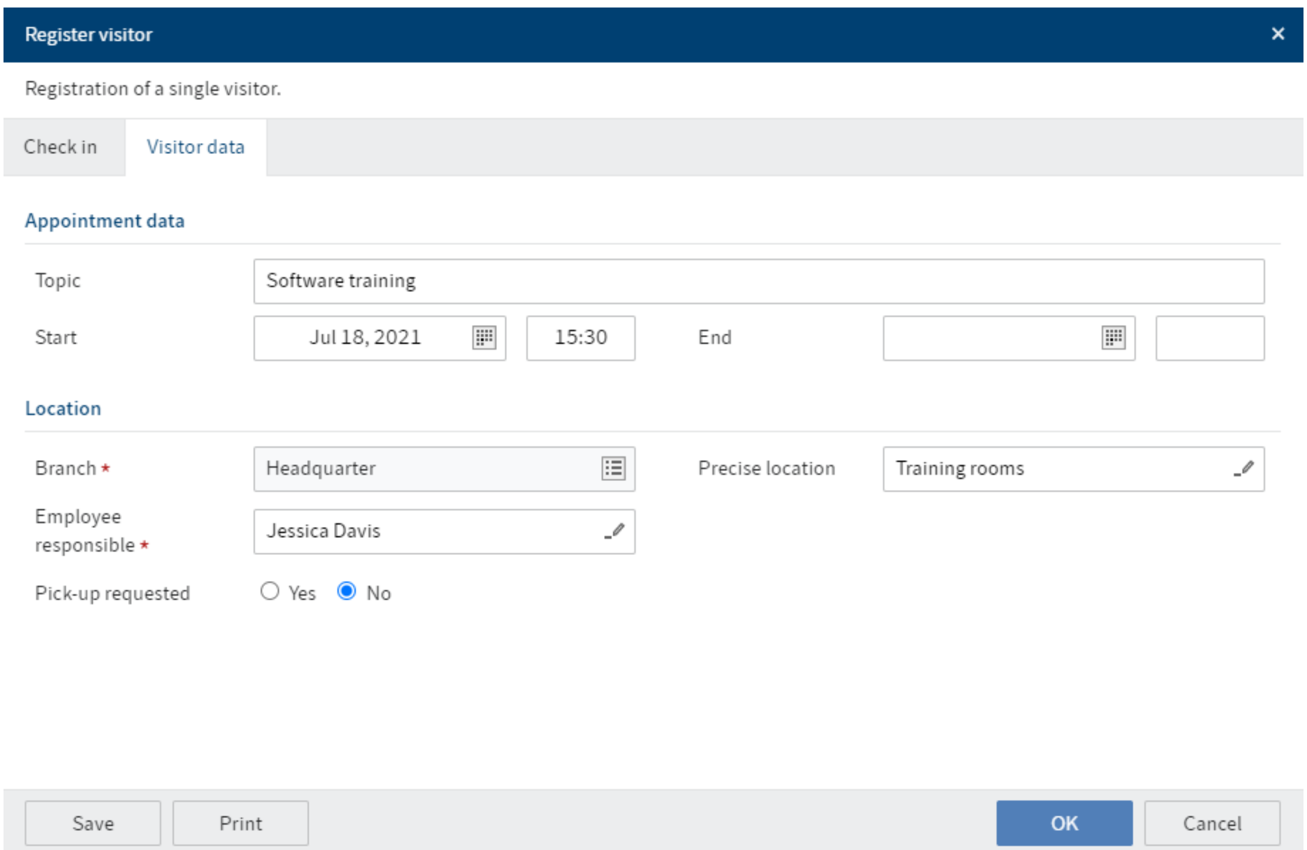


Fig.: 'Register visitor' dialog box, 'Visitor data' tab

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

Pre-register group: 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*.

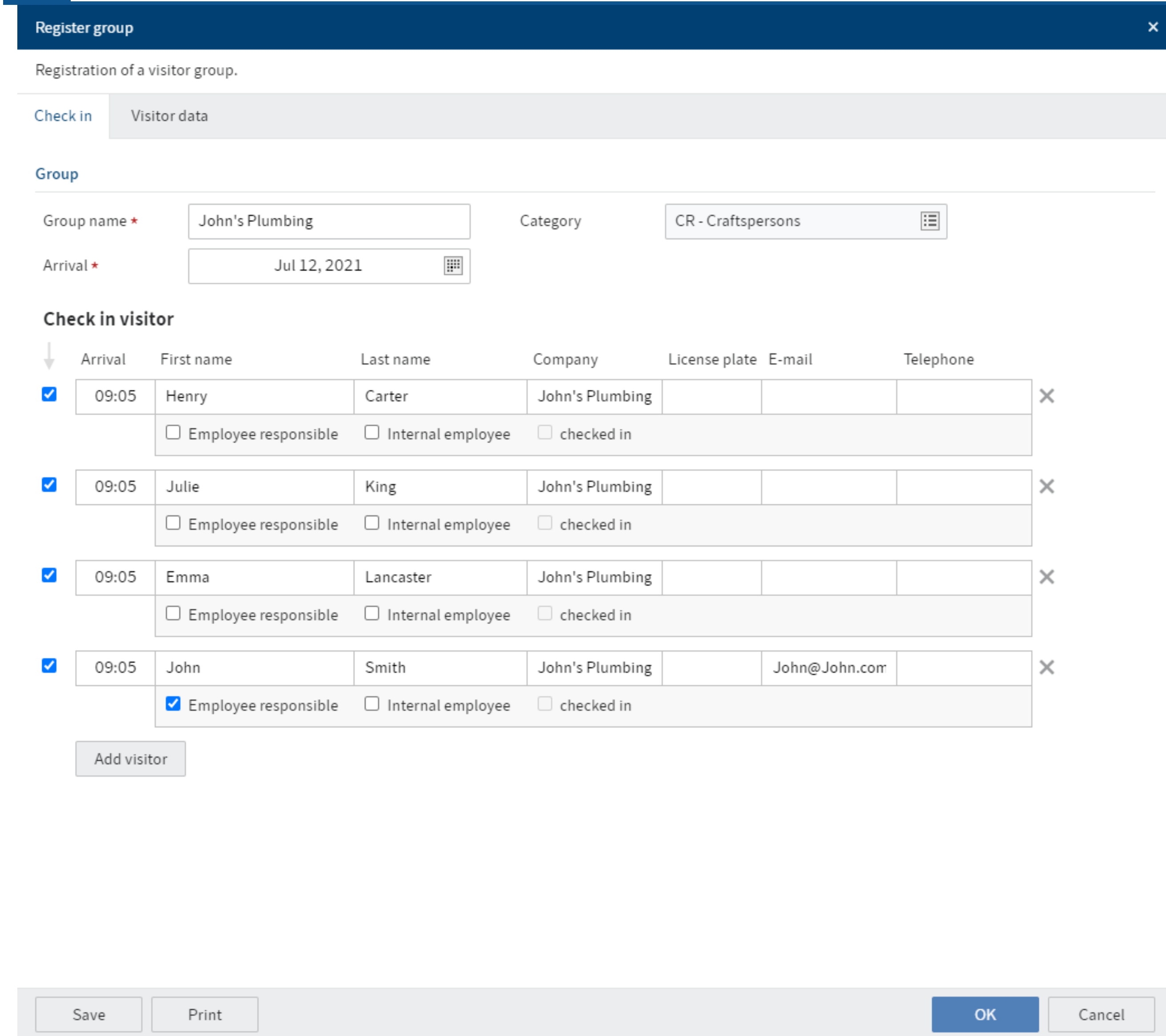


Fig.: 'Register group' dialog box, 'Check in' tab

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.

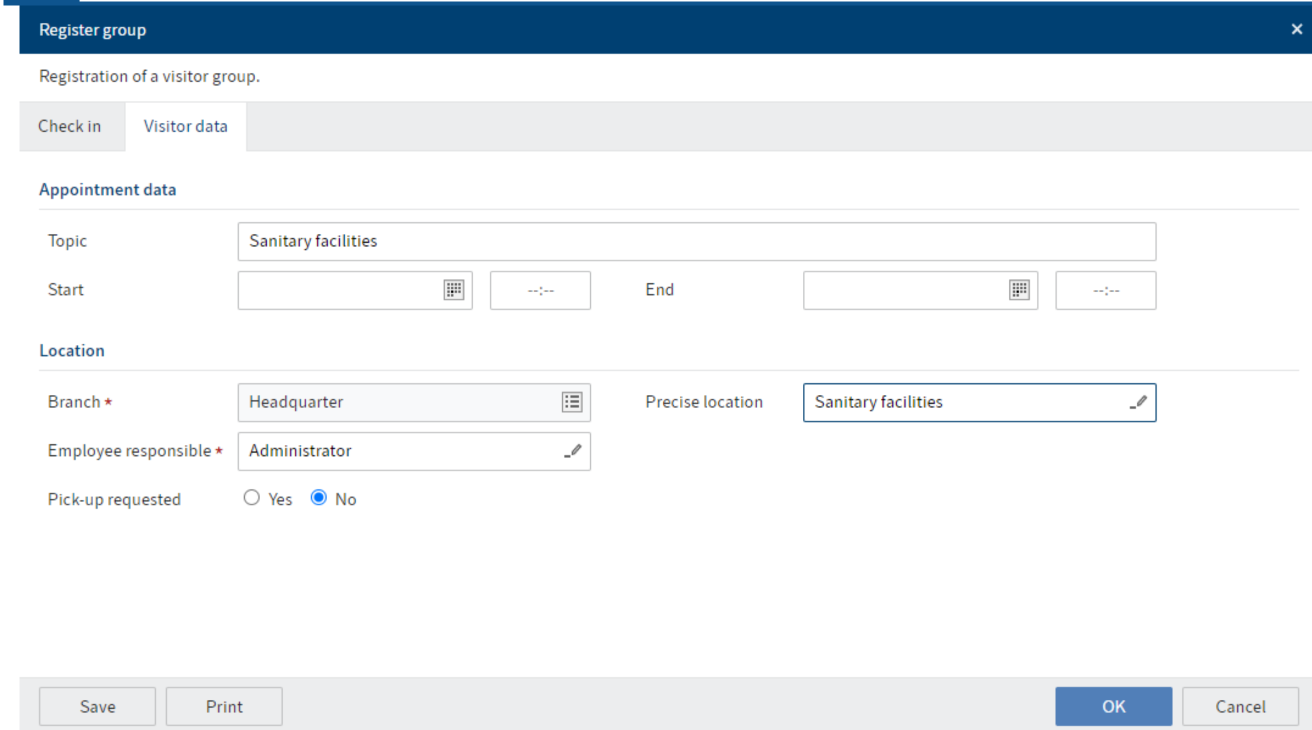


Fig.: 'Register group' dialog box, 'Visitor data' tab

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*.

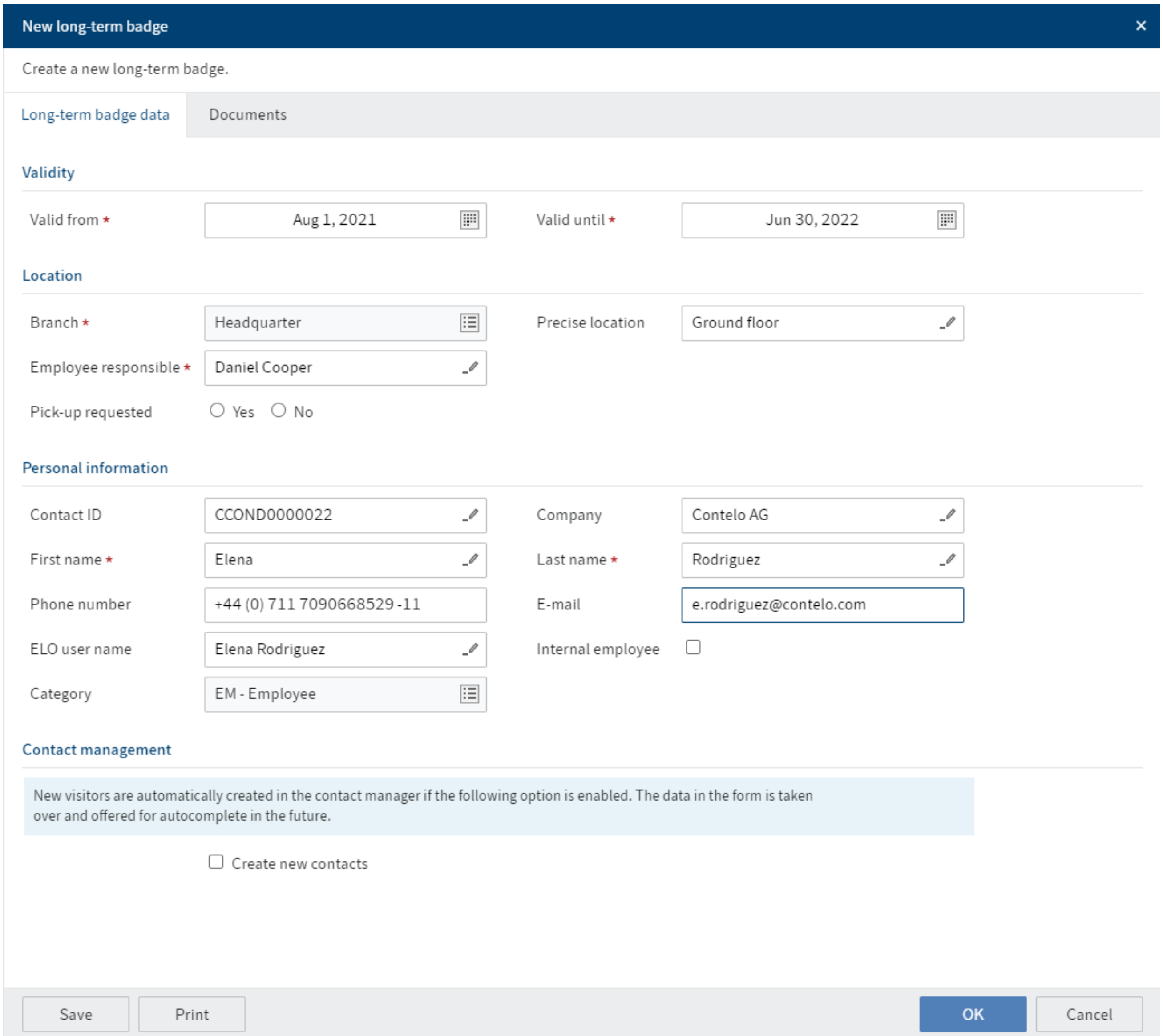


Fig.: 'New long-term badge' dialog box, 'Long-term badge data' tab

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.

1.

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.

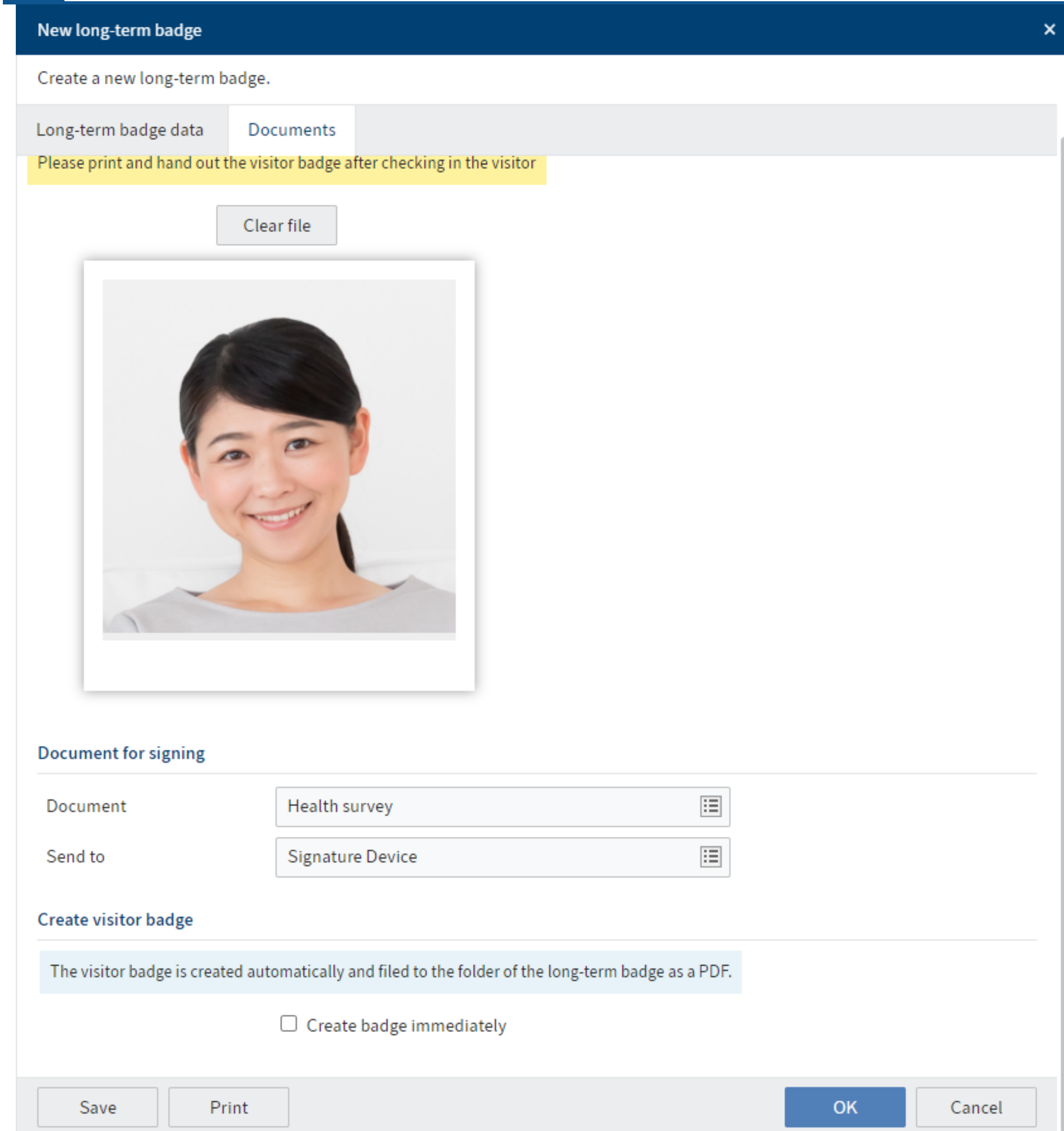


Fig.: 'New long-term badge' dialog box, 'Documents' tab

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.

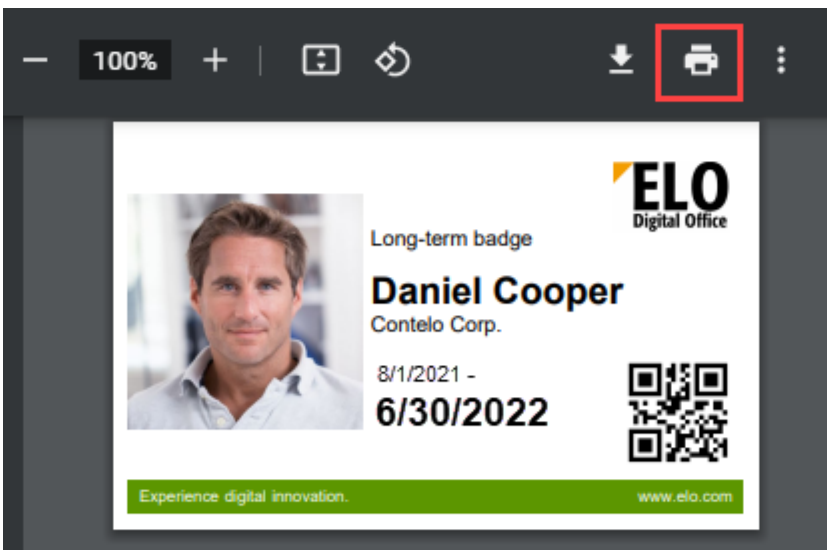


Fig.: 'Print' button

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*.

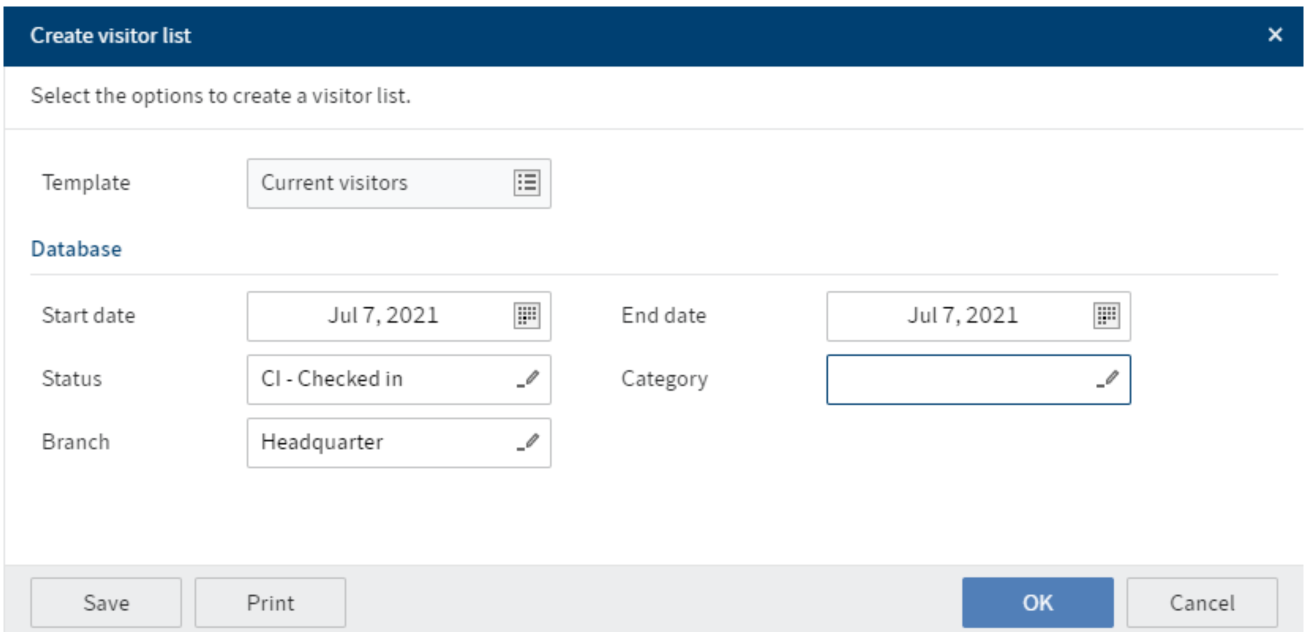


Fig.: 'Create visitor list' dialog box

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 Add visitor picture 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.

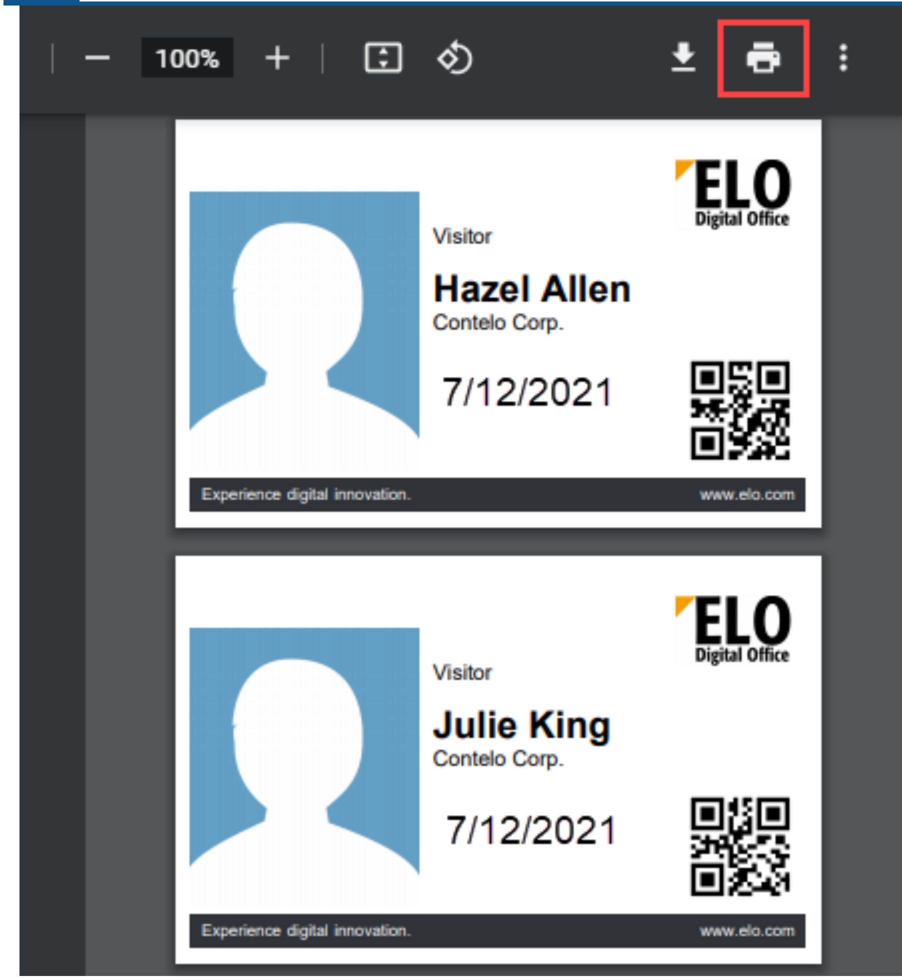


Fig.: 'Print' button

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.

1.

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

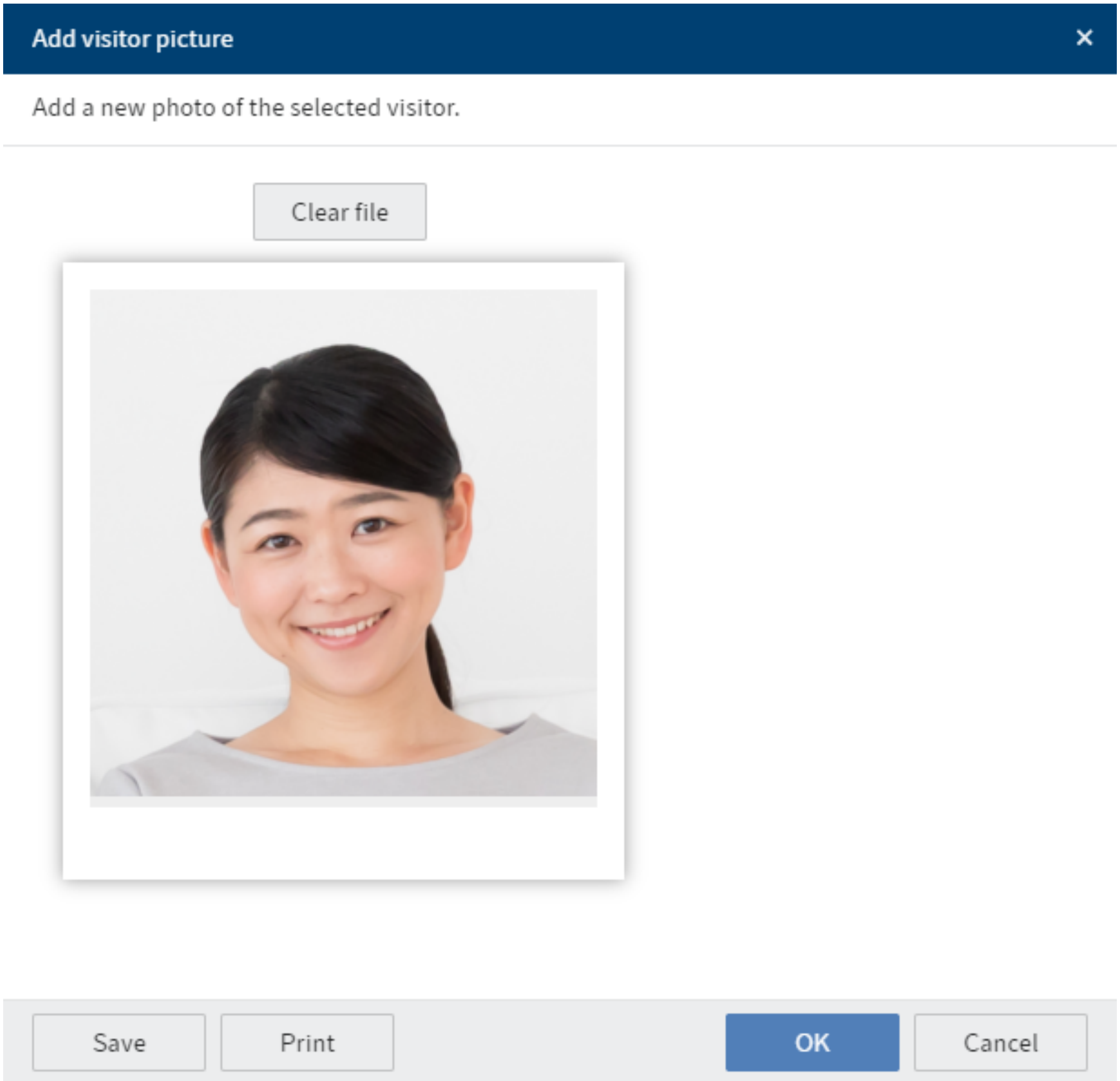


Fig.: 'Add visitor picture' dialog box

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

The picture is automatically used when creating a visitor badge using the Create visitor badge 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*.

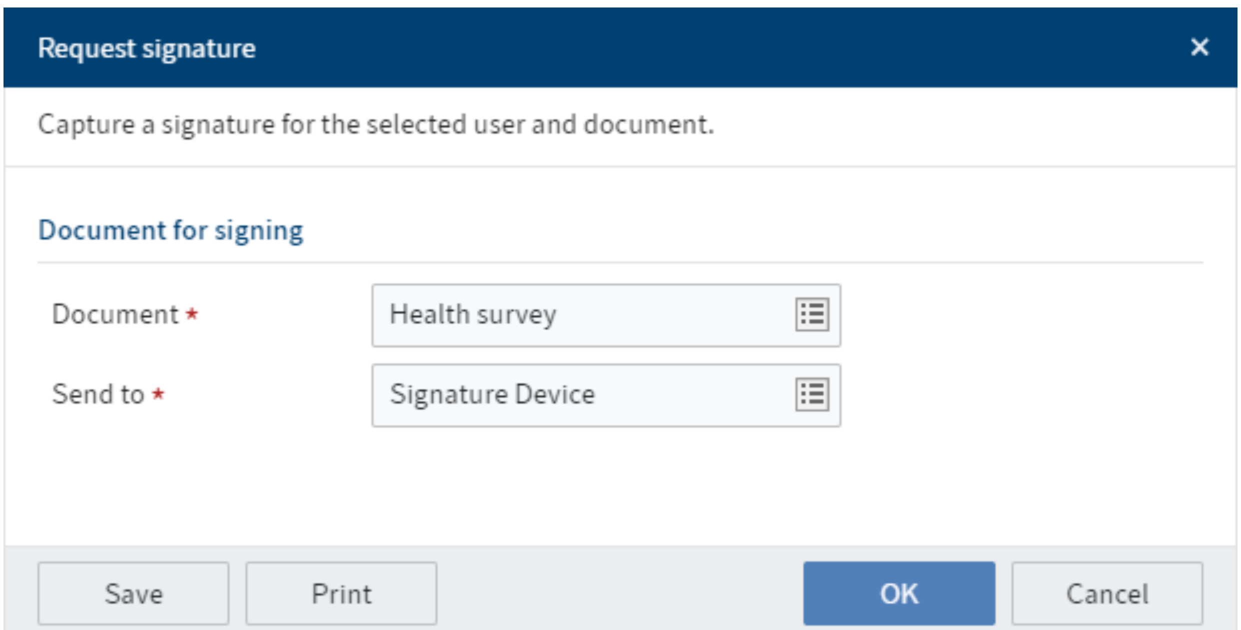


Fig.: 'Request signature' dialog box

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*.

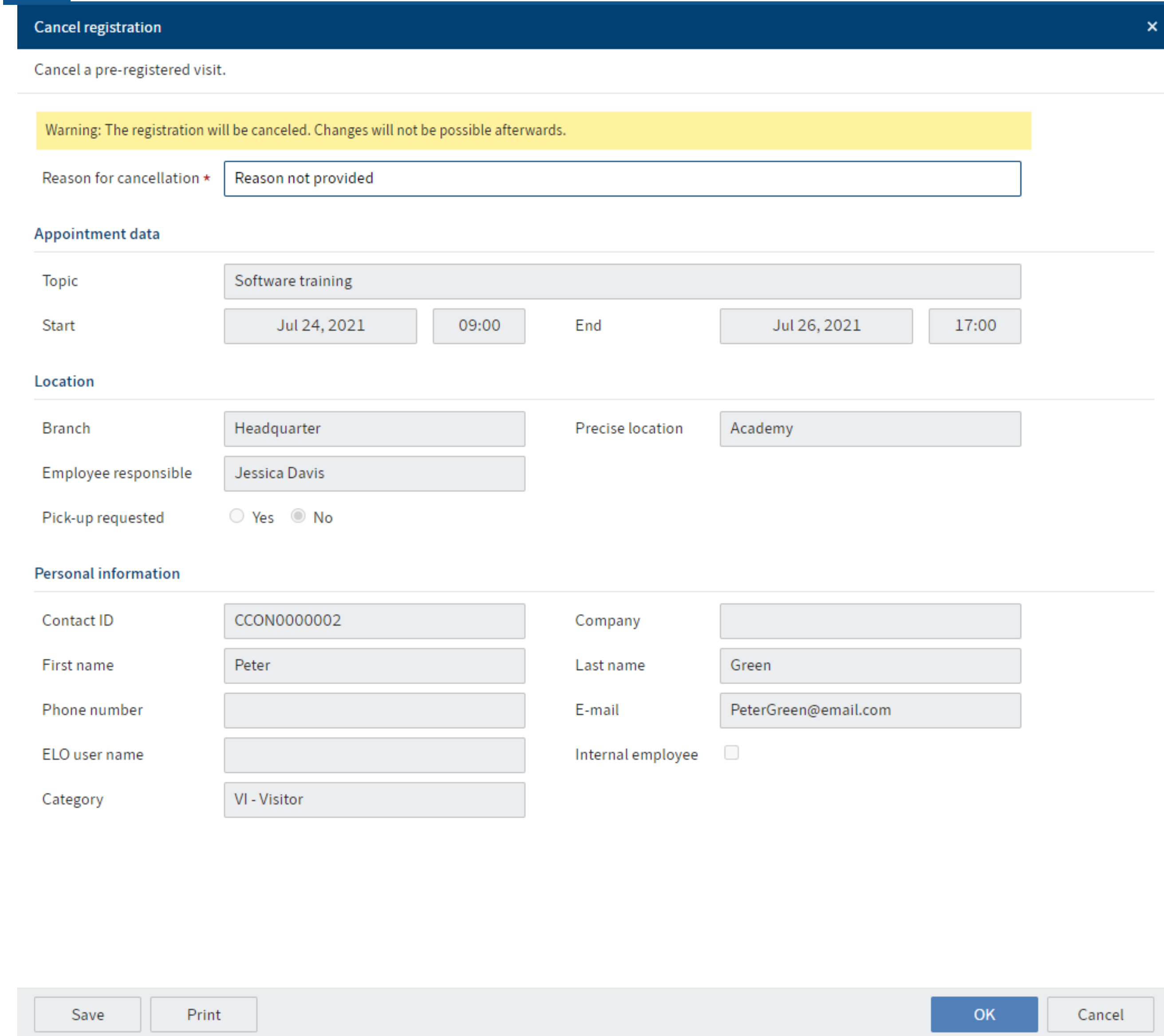


Fig.: 'Cancel registration' dialog box

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

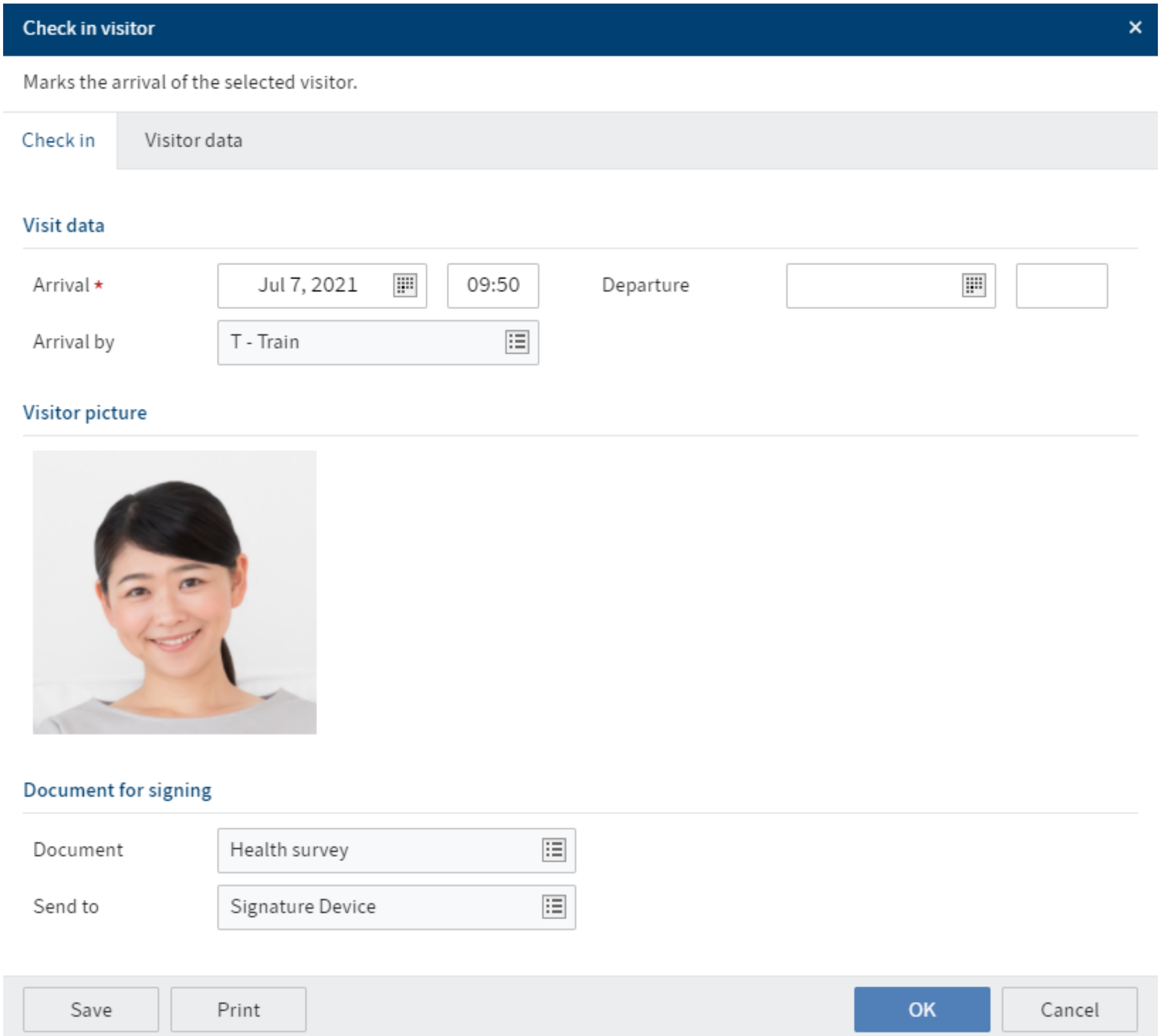


Fig.: 'Check in visitor' dialog box, 'Check in' tab

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

> **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.

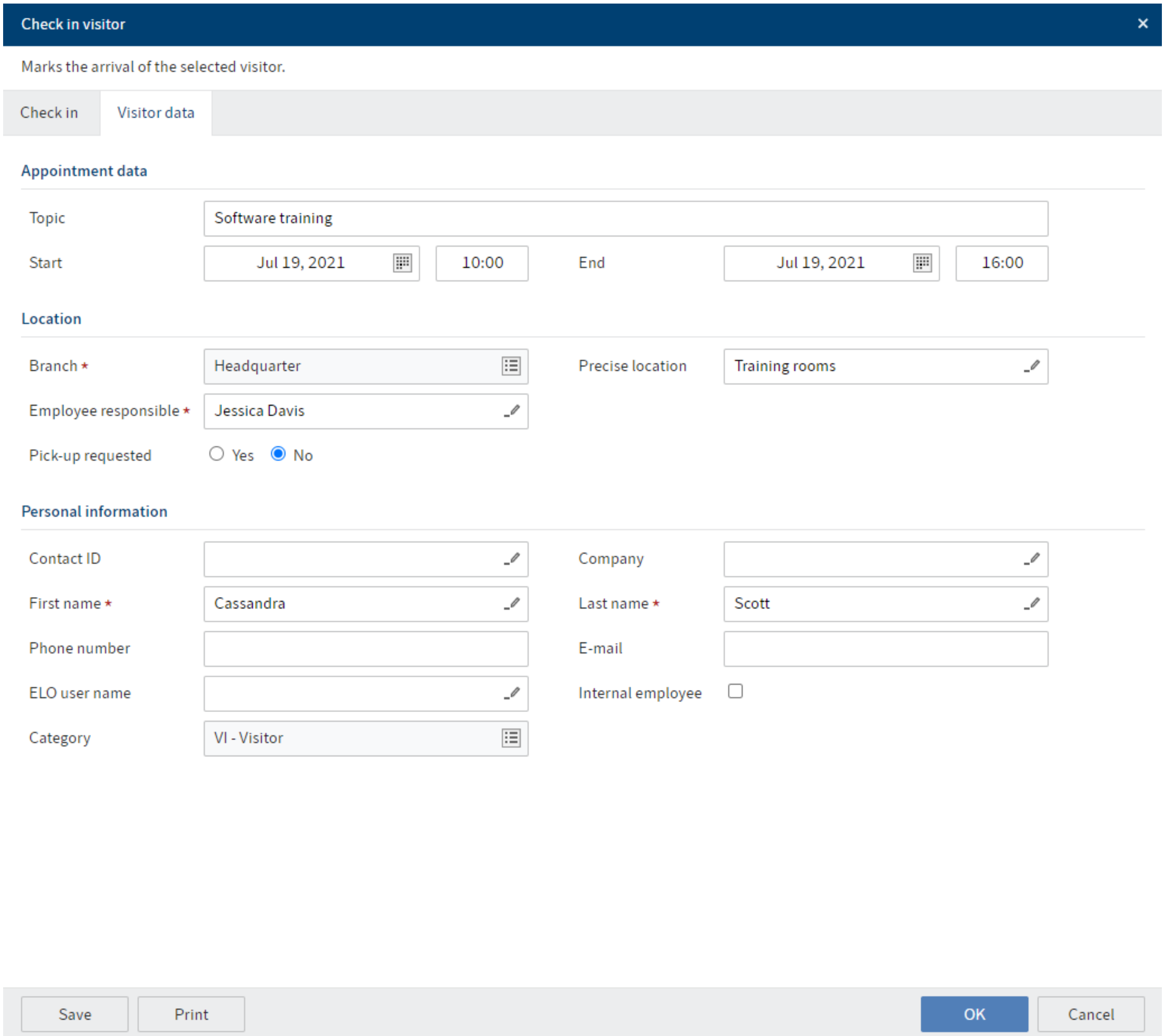


Fig.: 'Check in visitor' dialog box, 'Visitor data' tab

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 group

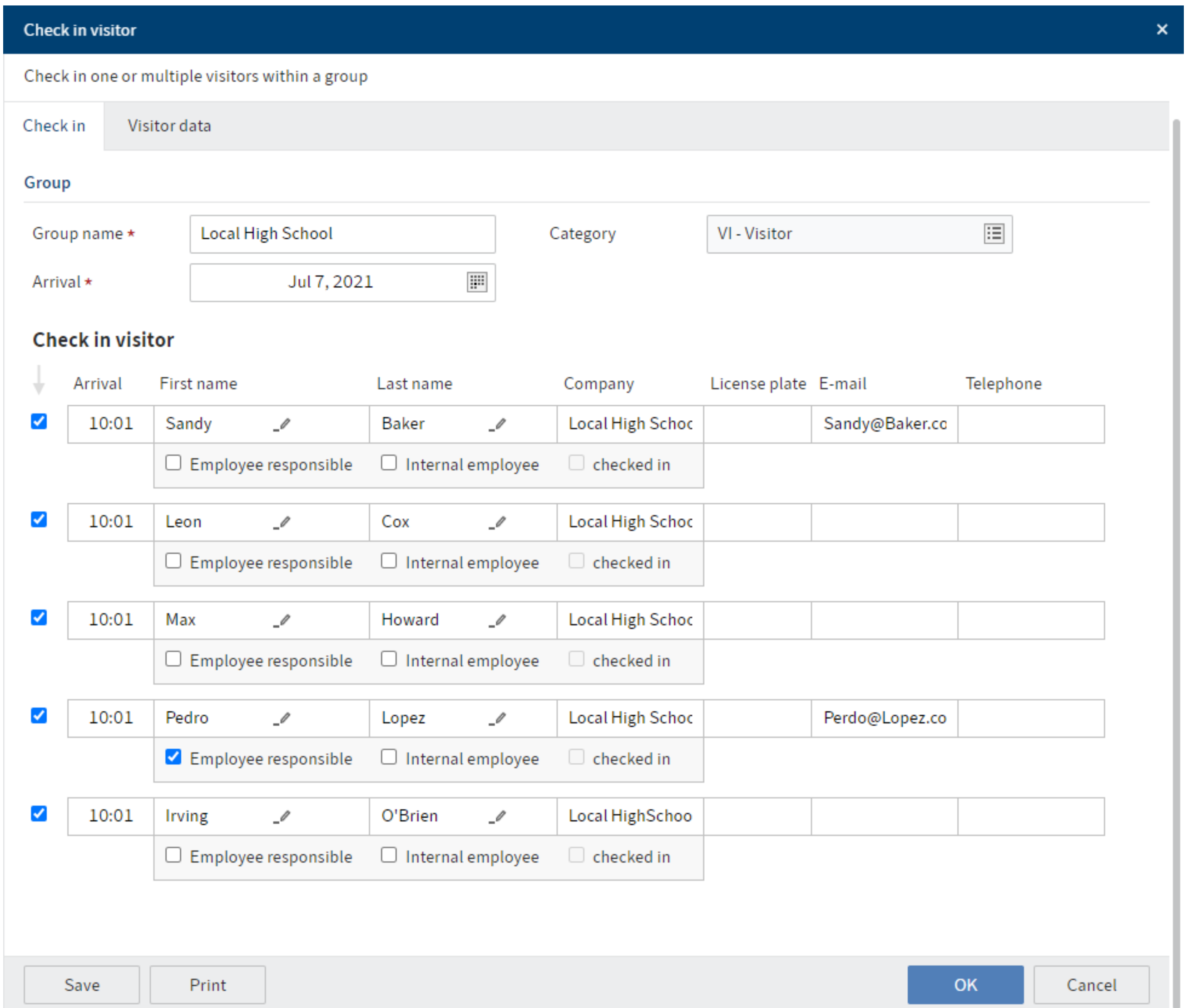


Fig.: 'Check in visitor' dialog box, 'Check in' tab

In the *Check in visitor* dialog box, the *Visitor data* tab is already filled with the data from pre-registration. 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 Check in visitor 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 cancel their registration.

At the end of the visit, use the Check out visitor 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

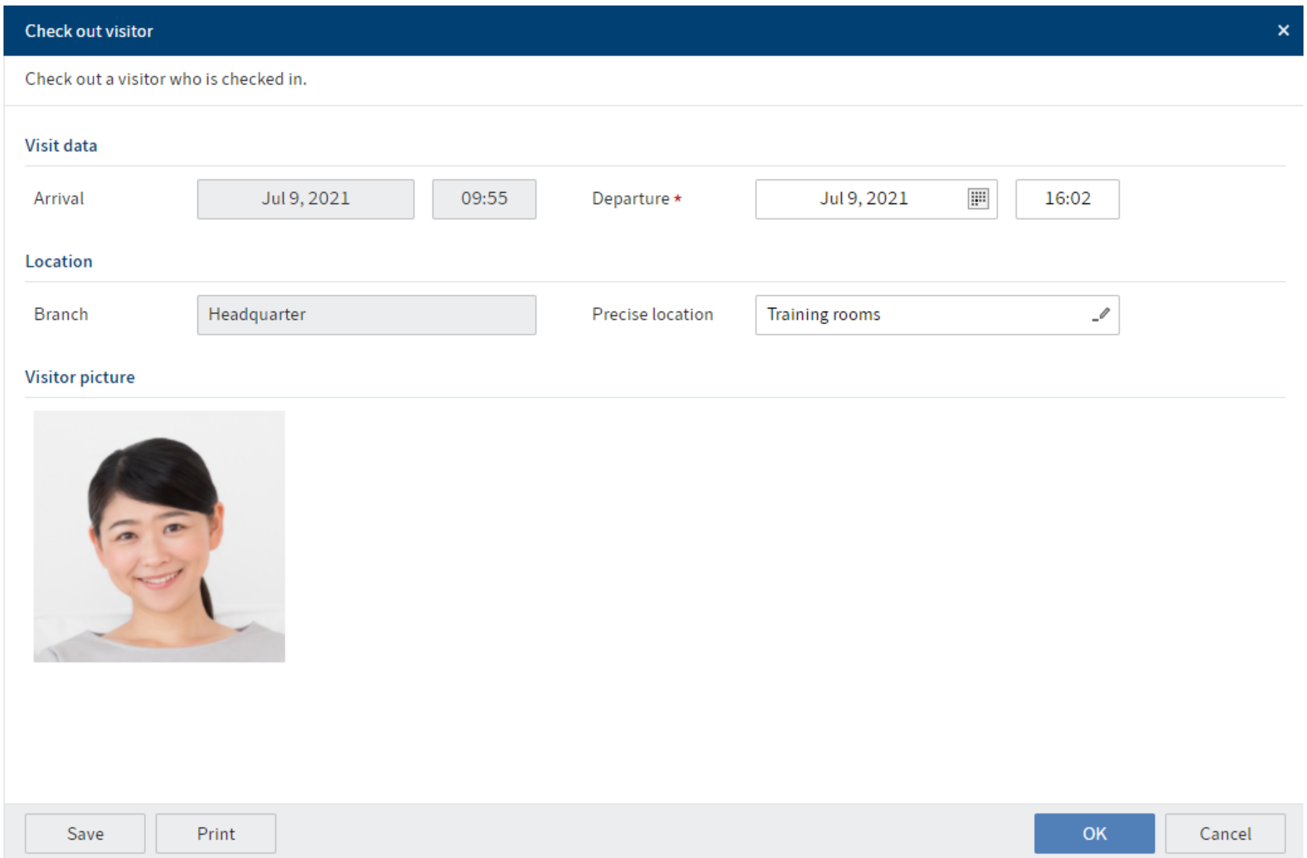


Fig.: 'Check out visitor' dialog box

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 checked back in at a later time.

Check out group

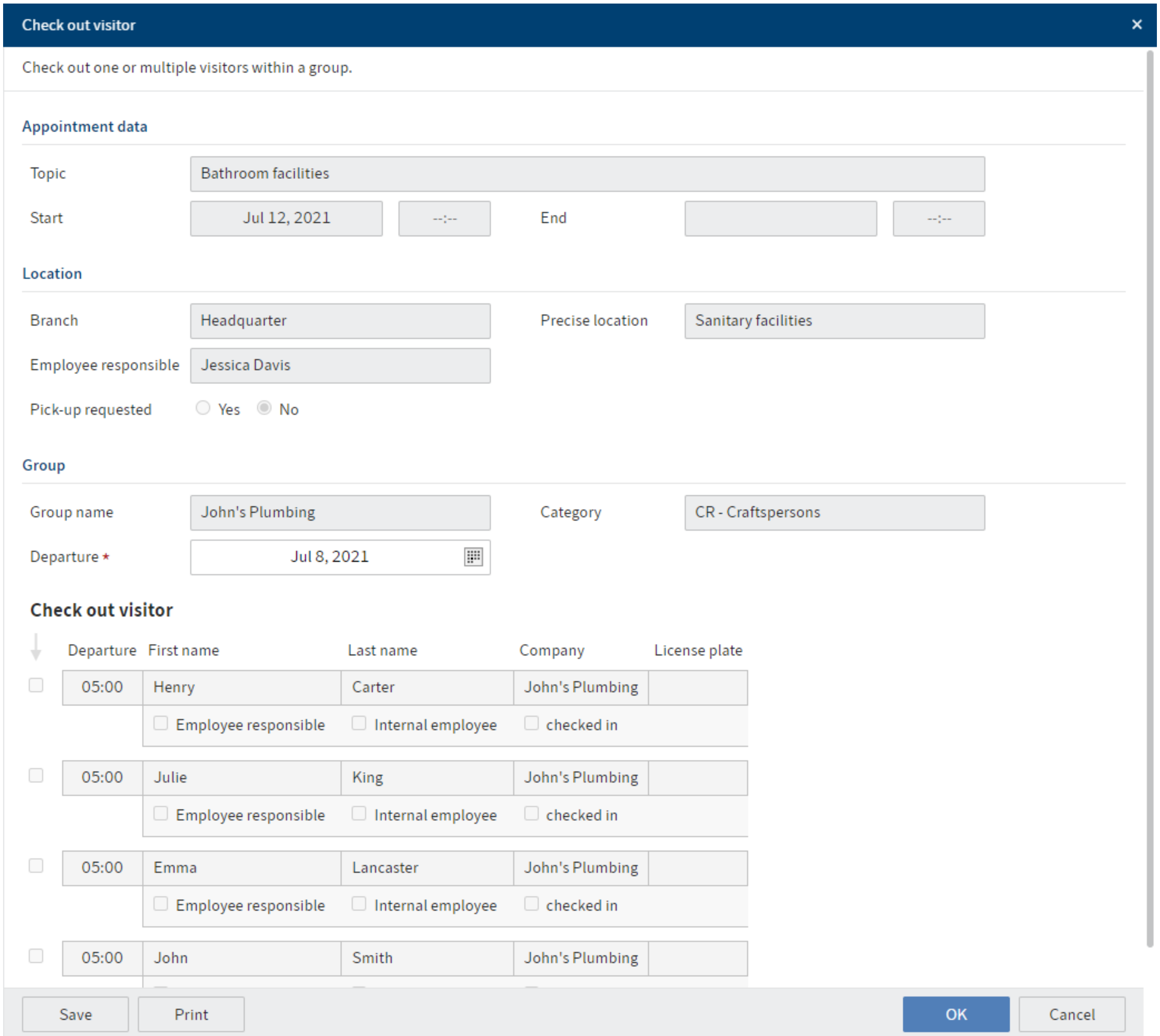


Fig.: 'Check out visitor' dialog box

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 checked back in 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*.

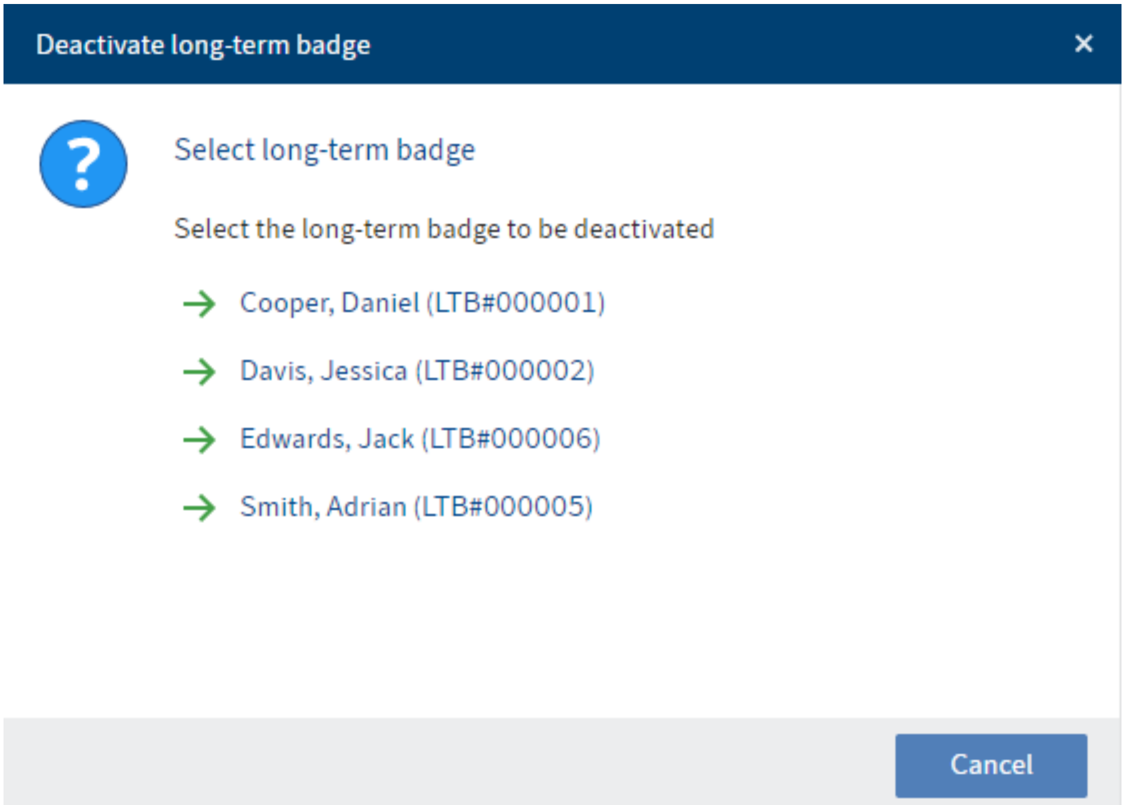


Fig.: 'Select long-term badge' dialog box

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

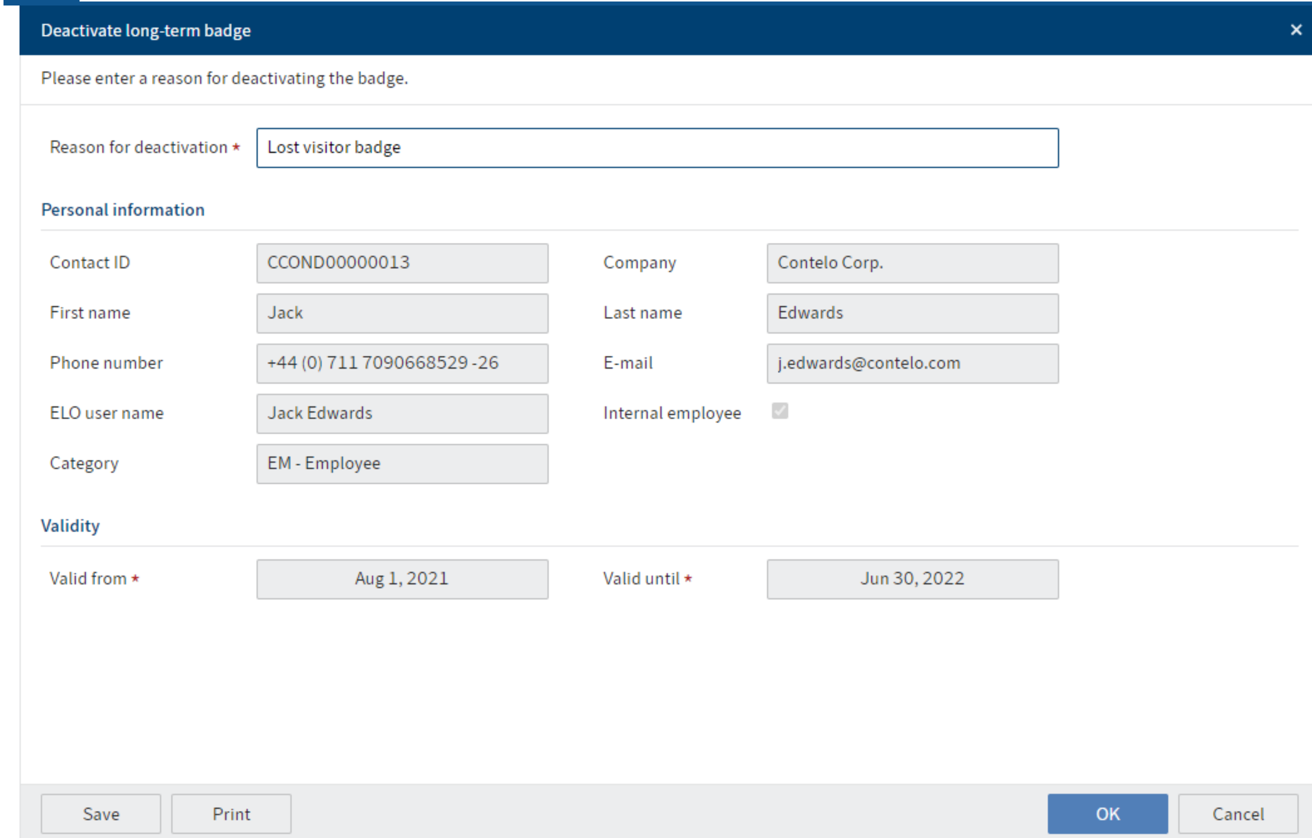


Fig.: 'Deactivate long-term badge' dialog box

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 Create visitor badge 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*.

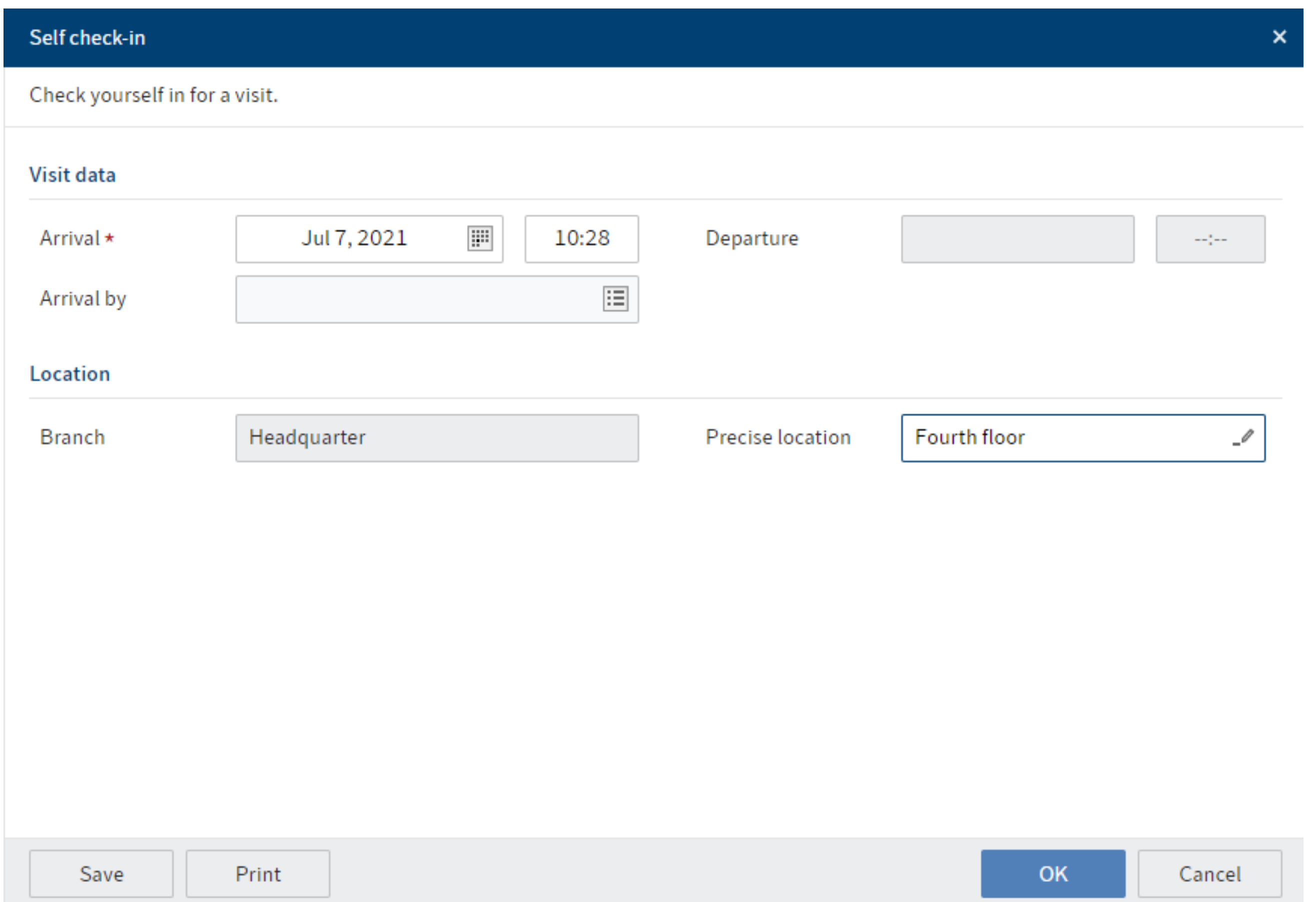


Fig.: 'Self check-in' dialog box

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

1.

Click *OK*.

Result

You are checked in.

Outlook

When you leave the building, check out with the [Self check-out](#) 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*.

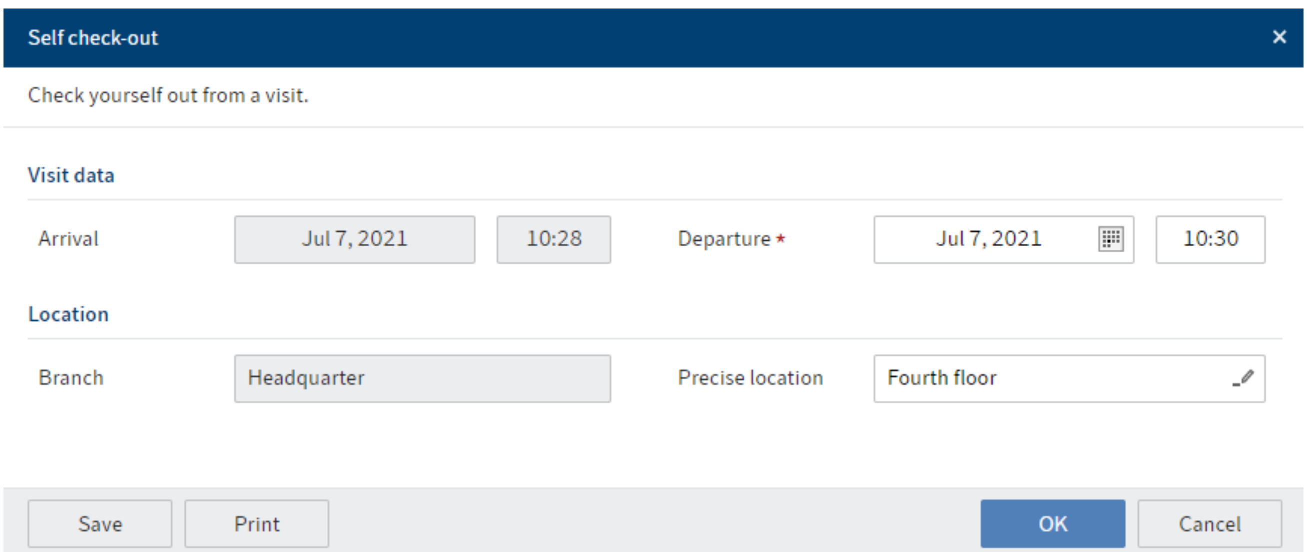


Fig.: 'Self check-out' dialog box

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.

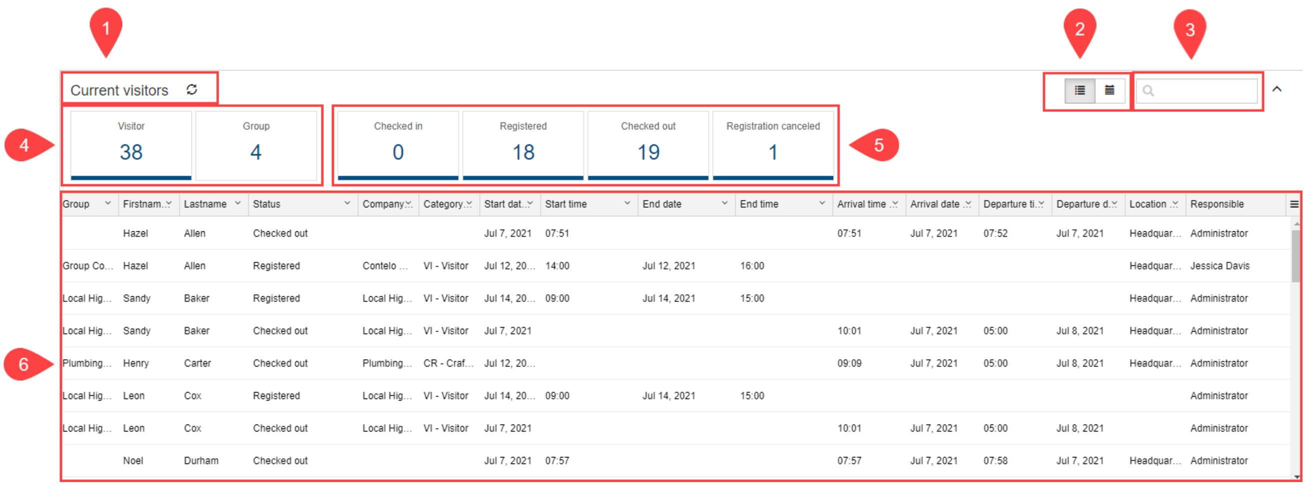


Fig.: Dashboard in the table view

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

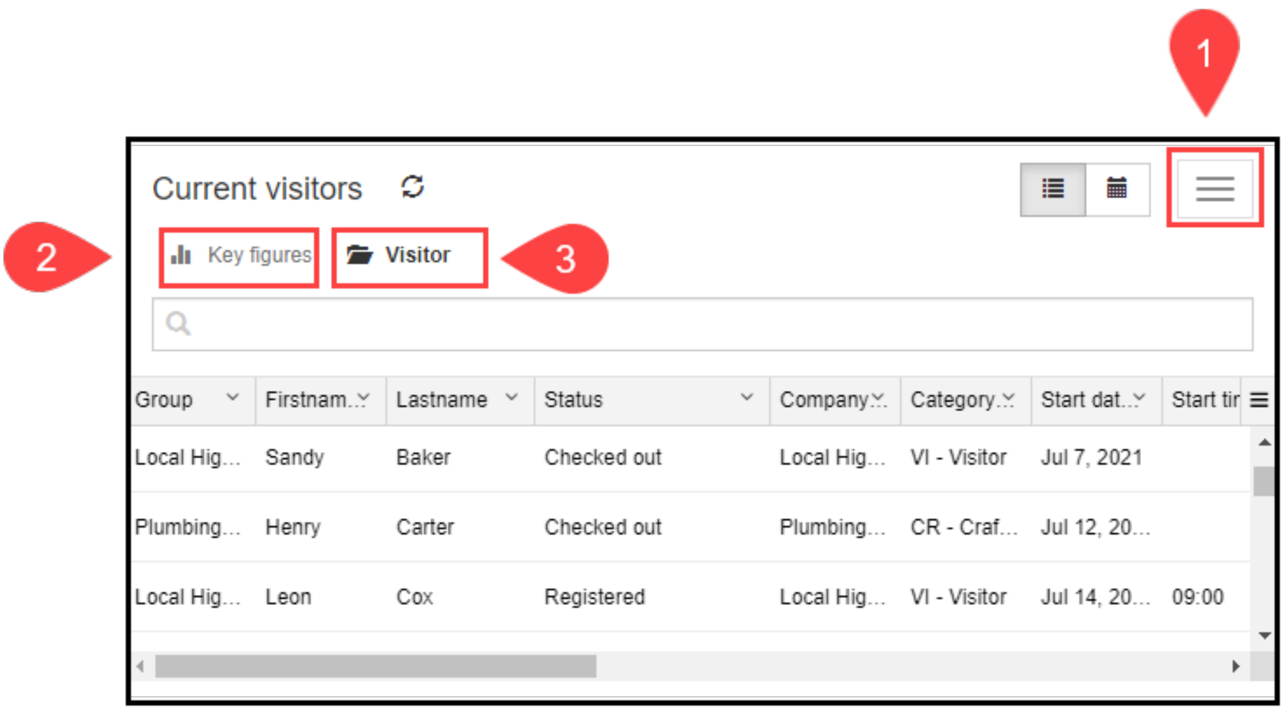


Fig.: Dashboard in minimized view

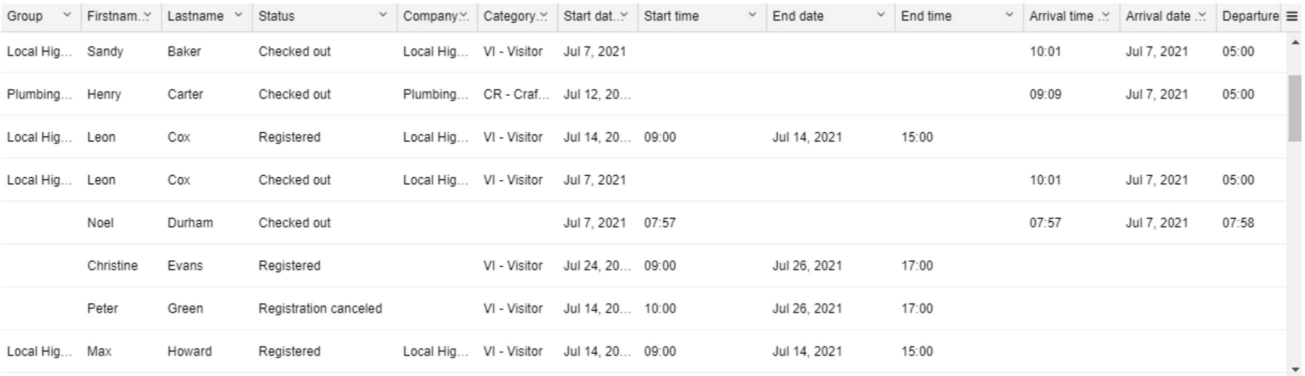
The dashboard automatically adjusts to the size of the browser window. Here, you see the view with a narrower width, where you can view either *Key figures* or *Visitor*.

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.

Table



Group	Firstnam...	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.

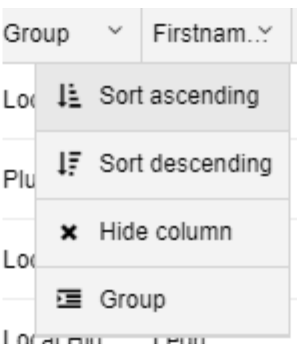


Fig.: Customizing the table view

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.

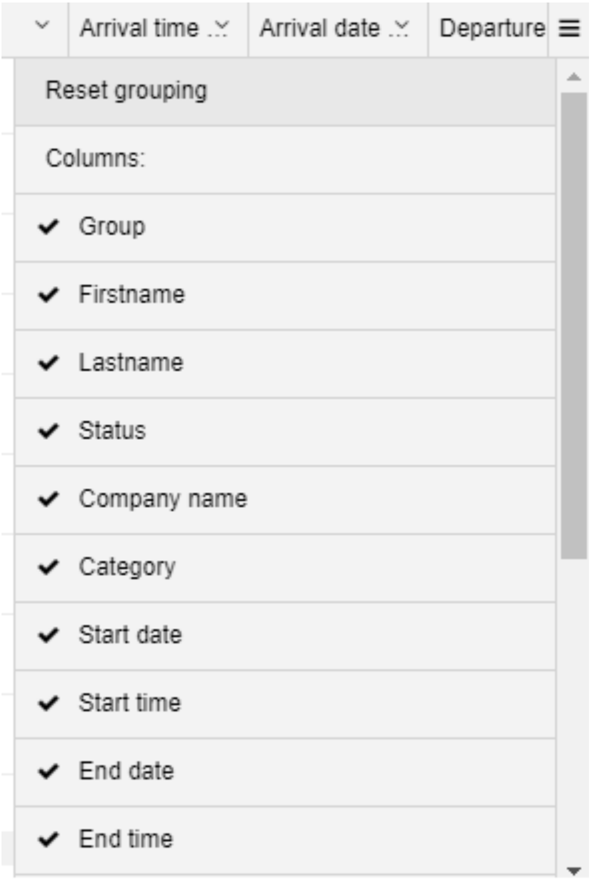


Fig.: Overview of all columns

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

Calendar

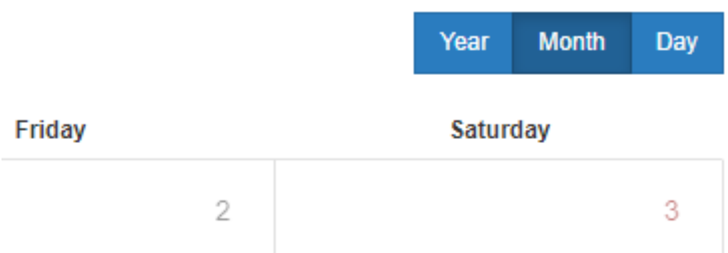


Fig.: 'Year', 'Month', and 'Day' buttons

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

Data from the visitor file is shown in all views.

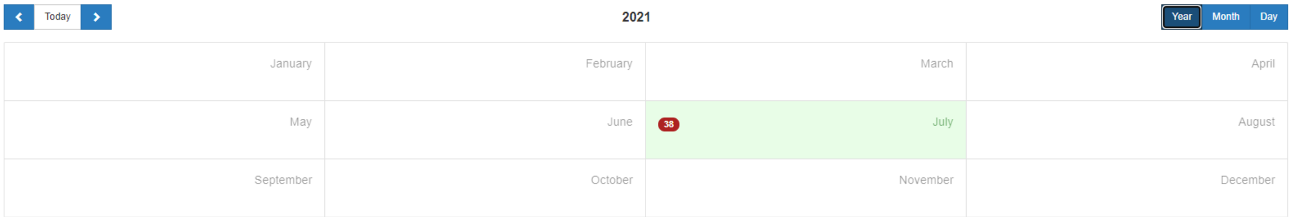


Fig.: Annual view

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

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.

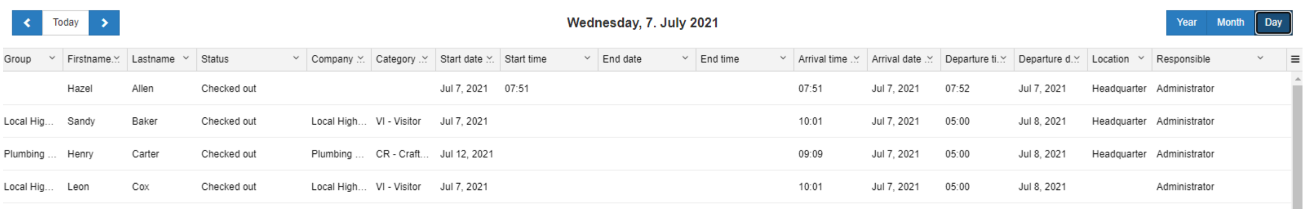


Fig.: Day view

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.