SAVANCE EIOBOARD

EIOBoard Kiosk Visitor Management Setup

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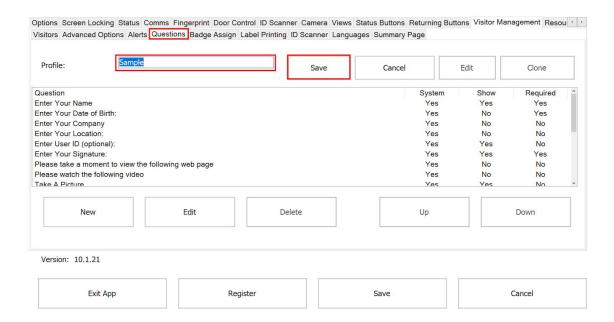
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Overview

This guide will help set up the Visitor Management System offered within the EIOBoard Kiosk software. This guide will also cover how to set up a label printer and camera.

Question Profiles

To allow a visitor to sign in, a question profile must be created so that at least a name can be taken from the visitor to identify them in the system. To create a question profile, go to the "Questions" tab and select "New" at the top right. Then name and save the question profile.
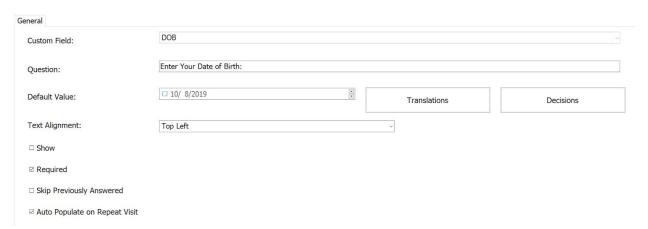

Editing and Adding Questions

After creating a question profile, several default questions are available. The one question "Enter Your Name" is the only question which cannot be disabled as a name is required to identify users. Selecting "Edit" will allow for changes to specific questions. For most questions which require simple text input,
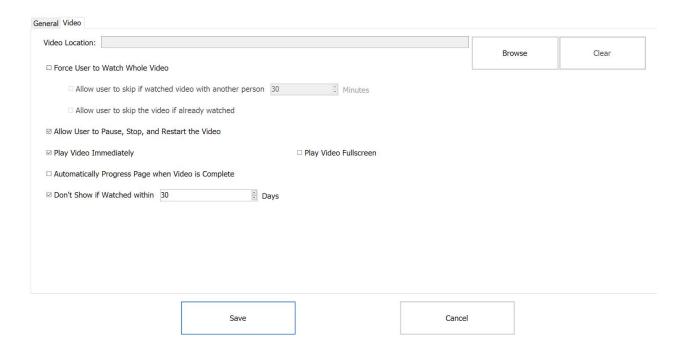
the editor will allow selection of the field which is populated by their answer, the wording of the question, the default value, the text alignment, and choose whether is is shown, required, skipped if there is a known response, and auto populated with known response.
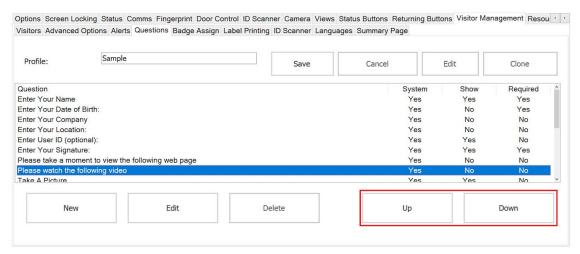

For some questions such as questions which ask the visitor to watch a quick safety video or read and sign an agreement, there is an additional field which will usually require a source and give some options that can be set if a visitor has already seen the video.

Finally, to move the position of a question to be asked sooner or later, highlight the question with a click and then use the up and down buttons.

Additional Profiles

When setting up kiosks, separate question profiles can be created which ask distinct questions. This is especially useful if more than one kiosk will be used at different locations for slightly different purposes. For example, if one kiosk is being used to check in contractors who must watch a safety video while another is signing in guests who are going on a tour and must sign a document, these profiles can be set up with the distinct questions to get the information needed by each distinct party.

Additional Accessories

The kiosk can be set up with accessories which help with the visitor management process. Firstly, a card reader can be implemented to assign a badge directly to the visitor. This can be a temporary measure so that the few visitor badges may be reassigned to a different visitor. To set up a badge reader, please see the article here. In this article, we will discuss hooking up a camera and label printer and a few basic troubleshooting steps.
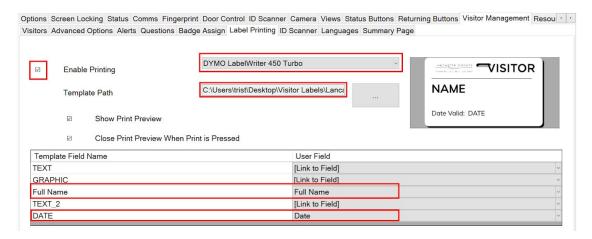
Label printing

If a Dymo label printer is being used along with the kiosk software for visitor management, make sure that the Dymo Software was installed by the EIOBoard kiosk installer. If it was not, go ahead and get the software independently, as it is necessary for printer recognition. Once this is installed, connect the

printer. It should be recognized immediately as a new device. If there is some trouble getting the printer to be recognized, right click on the start button and remove the device/printer that has been added. Then unplug and replug the printer to install the device fresh.

Once recognized, head into the EIOBoard Kiosk software and go to the "Label Printing" tab within Visitor Management. Here you will enable printing, choose the printer, and select the template. Once the template is selected, choose which fields to map dynamic text boxes so that the correct information is on the badges.
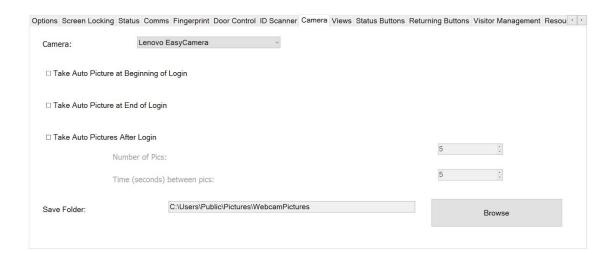
Camera setup

The camera should be fairly straightforward to set up and once plugged into the usb port it should be a recognized camera that can be used in the EIOBoard Kiosk software. If the camera is not recognized, check device manager by right clicking the start button and see if there is a driver update which is available. Finally ensure that different usb ports are used and look for a USB 3.0 if possible.
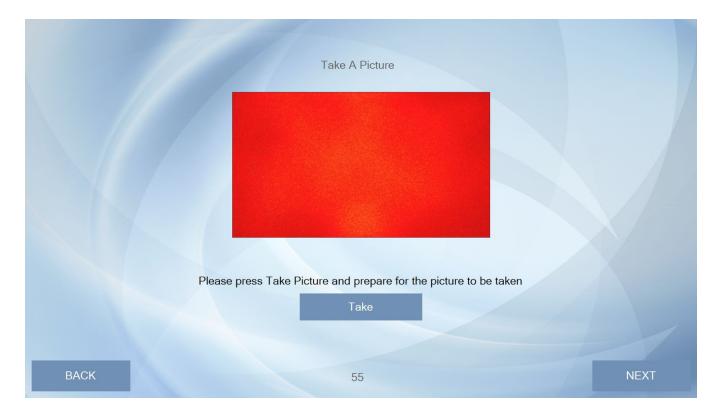
Once the camera is ready for use with the EIOBoard Kiosk software, head to the "Camera" tab and select the camera from the dropdown. Here options to automatically take pictures which are stored on the local machine are available. Note these are distinct from the pictures held in the EIOBoard database associated with each user.

After the camera is selected, the question "Take A Picture" should be ready to take photos, enable this question as a "shown" question, then test it out on a sample visitor sign in.

Final Notes

Some of the more niche and advanced settings such as language options and Barcode ID scanners have been omitted from this guide. If specific questions about those topics arise, it would be best to contact support to help with the specific use case.

Alert settings

Setting up alerts from guest sign in can require cross-platform settings changes and a detailed guide can be found at this knowledge base article.