# Business Solution ELO Visitor

## Basics

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# Basics

## Roles and groups

### User roles

User roles control the availability of actions in visitor management. The corresponding functions are available on the ribbon to users in this group.

### Front desk staff: sol.visitor.roles.Reception

Front desk staff has access to all visitor management actions. They can register and check in visitors and groups, and have access to report functions.

### Involved employees: sol.visitor.roles.Employees

Company employees can be granted the right to pre-register visitors and visitor groups. Users in this ELO group (role) are given access to pre-registration actions.

### Self-service: sol.visitor.roles.SelfService

Individual company employees can be granted the right to use self-services. This refers to the actions Self check-in and Self check-out.

### Configuration: sol.visitor.roles.Administration

Individual company employees can be given the right to edit the contract management configuration. This applies to the custom configuration under *//Administration//Business Solutions Custom//visitor//Configuration* as well as the configuration interface in the ELO Administration Console.

## Groups and permissions

The standard version of the ELO visitor management solution features a number of groups that are used for selection lists and permissions concepts.

### Locations/branches: sol.visitor.Locations

A user group that contains the branches for visitor management. A branch should be represented by a group whose members are all people with the corresponding rights.

You will find more information on the permissions of individual locations or branches in the chapters Branches and Permissions to visitors and groups.

**Welcome screens: sol.visitorWelcomeScreens**

Welcome screens require access to visitor data to be able to display it. A group containing the users that can check in at the screen should be created for each screen.

> **Information**
>
> By default, a new account named *Welcome Screen* is created and assigned to this group. The account password should be changed after installation.

For more information, refer to the chapter Welcome screen.

**Signature devices: sol.visitor.SignatureDevice**

Signature devices require access to visitor data to be able to edit visitor documents.

Each signature device requires a separate ELO account. This account can be selected when requesting a signature. A signature request is then submitted to this account.

> **Information**
>
> By default, a new account named *Signature Device* is created and assigned to this group. The account password should be changed after installation.

For more information, refer to the Request signature and Sign documents chapters.

**Security check: sol.visitor.roles.Security**

In security-critical areas, you may have to perform a security check. Members of this group belong to the internal security department.

For more information, refer to the Security check – basics chapter.

## General information/procedure for updates

Single actions can be enabled individually for users and groups. For this, individual rights have to be assigned for the corresponding action configuration (definition). When updating to a new version, these rights are reset since they are contained in the base package.

The default groups above are created during installation. It is therefore recommended not to rename or delete the groups. If the standardized naming of these groups presents an issue, you can remove the *Visible in user lists* flag for them.

# Version history and dependencies

Refer to the official version history for more information. You will find it on the ELO SupportWeb as well as in the corresponding packages.

## Version 1.06.004

The Common version 1.15.000 includes an important AngularJS security update, which affects all AngularJS-based apps as well as most app modules. The apps that come with this version of ELO Visitor have been modified accordingly.

The following ELOwf versions are required for use with Common 1.15.000:

- ELO 12: Version 12.09.000 and higher
- ELO 20: Version 20.09.002 and higher
- ELO 21: Version 21.02.004 and higher

For more information, refer to the [Information regarding update to version 1.15.000](#) part of the Common documentation.

ELO Visitor 1.06.004 has been tested with the following ELO components. Before you start installation, make sure that all components have been updated to at least the following versions.

| Component | ELO 12 | ELO 20 | ELO 21 |
|---|---|---|---|
| ELOix | 12.04.000.6309 | 20.06.002 | 21.02.003 |
| ELO Java Client | 12.04.002.179 | 20.09.001 | 21.02.002 |
| ELO Web Client | 12.01.000.378 | 20.09.000 | 21.02.001 |
| ELOwf | 12.09.000 | 20.09.002 | 21.02.004 |
| ELOas | 12.01.000.013 | 20.02.018 | 21.02.006 |

> **Please note**
>
> To prevent issues with ELO apps, the 64-bit ELO Java Client should be used.

**Dependencies/minimum requirements for ELO Business Solutions packages**

| Package | Version |
|---|---|
| common | 1.15.000 |
| common_document | 1.15.000 |
| common_monitoring | 1.15.000 |
| common_signature | 1.15.000 |
| contact | 1.09.004 |

## Version 1.06.000

This update adds the following important functions to ELO Visitor:

- Handling of visitor lists for contact tracing
- Employee self check-in and check-out (non-contact via long-term badges or completely digitally with new self-service functions)
- Completing and confirming surveys
- Data protection

**Major new features**

| Area | Description |
|---|---|
| Visit data | New fields *Precise location* and *ELO user name* |
| Visitor category | New *Employee* category as standard |
| Long-term badge | Automatic creation of a badge document (PDF) when creating a new long-term badge is now optional. At the same time, it is also possible to create this document at any time later on. |
| Visitor list | Upstream dialog box with filter options for creating custom visitor lists. The primary focus is contact tracing within a specific period. |
| Self-service | The new functions Self check-in and Self check-out enable ELO users to check themselves in and out. The ELO user name has to be associated with the long-term badge for this. |
| Launchpad | The new self-services are now also available as a launchpad tile. |
| Welcome screen | Check-in via barcode is now also supported in the welcome app. |
| Sign documents | The mechanism for signing documents has been extended. Additional fields are now offered besides the signature field. In the standard solution, this takes the form of a health survey. This template can be extended and used for other purposes as well. |
| Data privacy fields | The fields *Personal identifier* and *End of deletion period* can now be completed automatically. Targeted deletion rules are defined for this reason. |
| E-mail notifications | Optionally, visitors can receive an e-mail invitation when pre-registered. |
| Contact management | The new *ELO user name* field is also synchronized with ELO Contact. Please make sure that Contact is also up-to-date. |

> **Information**
>
> The filing path for visitor lists is now in a new location in the configuration and may have to be updated again.

**Please note**

The period of validity for a long-term badge includes the specified end date with version 1.06.000. In earlier versions, the period of validity excluded the specified end date.

## Version 1.05.000

ELO Visitor 1.05.000 has been tested with the following ELO components. Before you start installation, make sure that all components have been updated to at least the following versions:

| Component | ELO 11 | ELO 12 | ELO 20 |
| --- | --- | --- | --- |
| ELOix | 11.05.000.2293 | 12.04.000.6309 | 20.00.000 |
| ELO Java Client | 11.09.000.140 | 12.04.002.179 | 20.00.001.94 |
| ELO Web Client | 11.07.000 | 12.01.000.378 | 20.00.006 Build 395 |
| ELOwf | 11.00.000 | 12.01.002.377 | 20.00.005 |
| ELOas | 11.00.002 | 12.01.000.013 | 20.00.000 Build 011 |

**Information**

Whenever possible, ELO Business Solutions are developed to be backward compatible. The solution may work in older versions of the program, but as no testing is performed, functionality cannot be guaranteed.
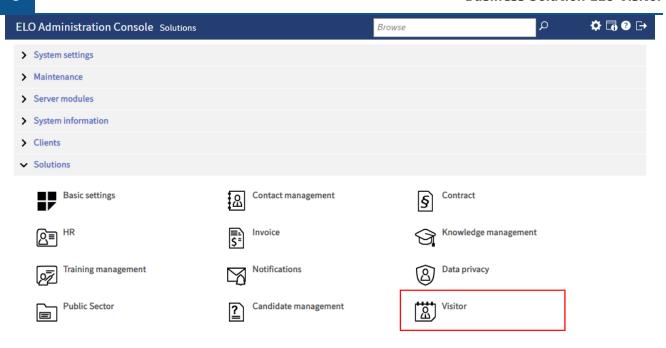
**Please note**

To prevent issues with ELO apps, the 64-bit ELO Java Client should be used.

**Dependencies/minimum requirements for ELO Business Solutions packages**

| Package | Version |
| --- | --- |
| common | 1.09.000 |
| common_document | 1.09.000 |
| common_monitoring | 1.09.000 |
| common_signature | 1.09.000 |
| contact | 1.09.000 |

The visitor management configuration has been completely revised and from ELO 12 it is located in the ELO Administration Console; for ELO 10 and 11, it is available to administrators as a tile in the client. Starting with this version, settings no longer have to be made in the custom package in the repository.

## Version 1.03.000

The following ELO components must be installed as a minimum requirement for ELO Visitor 1.03.000. Before you start installation, make sure that all components have been updated to at least the following versions:

| Component | ELO 10 |
|---|---|
| ELOix | 10.17.61 |
| ELO Java Client | 10.01.005 64-bit |
| ELO Web Client | 10.01.005 |
| ELOwf | 10.01.006 |
| ELOas | 10.01.000 |

> **Please note**
>
> To prevent issues with ELO apps, the 64-bit ELO Java Client should be used.

**Dependencies/minimum requirements for ELO Business Solutions packages**

| Package | Version |
|---|---|
| common | 1.03.006 |
| common_document | 1.03.006 |
| common_monitoring | 1.03.006 |
| common_signature | 1.03.006 |
| contact | 1.03.000 |

## Version 1.02.002

Version 1.02.002 contains several improvements and bug fixes.

**Dependencies/minimum requirements for ELO Business Solutions packages**

| Package | Version |
|---|---|
| common | 1.02.002 |
| common_monitoring | 1.02.002 |
| common_signature | 1.02.002 |
| contact | 1.02.002 |

We recommend using ELO 10.02.000 einzusetzen, as ELO 10.02.000 and ELO Web Client 9.03.002 feature improved stability and performance.

## Version 1.02.000

The following ELO components must be installed as a minimum requirement for ELO Visitor 1.02.000. Before you start installation, make sure that all components have been updated to at least the following versions:

We recommend using ELO 10.01 components since this version contains improvements to the updateability of ELOwf forms.

> **Please note**
>
> To prevent issues with ELO apps, the 64-bit ELO Java Client should be used.

| Component | ELO 9 | ELO 10 |
|---|---|---|
| ELOix | 9.16.110 | 10.00.011 |
| ELO Java Client | 9.03.018 64-bit | 10.00.010 64-bit |
| ELO Web Client | 9.03.002 | 10.00.002 |
| ELOwf | 9.03.002 | 10.00.002 |
| ELOas | 9.03.006 | 10.00.002 |

**Dependencies/minimum requirements for ELO Business Solutions packages**

| Package | Version |
|---|---|
| common | 1.02.000 |
| common_monitoring | 1.02.000 |
| common_signature | 1.02.000 |
| contact | 1.02.000 |

The following modules require licenses:

- Business Solution ELO Visitor

# Glossary and abbreviations

## Glossary

| Term | Description |
|------|-------------|
| ARCPATH | The filing path of an object in ELO.<br>Example: All new visitor registrations are filed in a separate folder structure.<br>ARCPATH: */Visitors/All Visitors* |
| Form module | ELO Visitor provides forms for capturing data. These consist of modules that include information on different aspects of visitor registration and are merged into forms using tab groups.<br>Example: Form component *02* contains all the information relevant to the visit date. |
| GUID | A unique reference number generated automatically when filing an object in ELO (Globally Unique IDentifier). GUIDs are normally displayed in an 8-4-4-4-12 format (XXXXXXXX-XXXX-XXXX-XXXX-XXXXXXXXXXXX), where each X stands for a character from the hexadecimal system and can therefore be a number from 0 to 9 or a letter from A to F. |
| SORD | An entry in ELO. This can either be a document or a folder. |

## Abbreviations

| Abbreviation | Term |
|--------------|------|
| ELOas | ELO Automation Services |
| ELO Visitor | Business Solution ELO Visitor |
| ELOix | ELO Indexserver |
| JS | JavaScript |