

# How to set up the EVA Check-in for Outlook add-in

In this guide for EVA Check-in admins, we introduce a new feature to help your organisation standardise and streamline visitor check-ins, and explain step-by-step how to get it set up for your sites.

*Note: You'll need to be (or enlist the help of) a Microsoft 365 admin to complete the setup.*

## What is EVA Check-in for Outlook?

The EVA Check-in for Outlook add-in allows your team to send pre-registration information, including an EVA Pass, to their external visitors, directly from Outlook – no need to log in to the EVA Check-in portal.

It's a great way to standardise and streamline visitor check-ins, ensure health and safety compliance, and make the most of your EVA Check-in subscription.

## What can I use it for?

To set up the Outlook add-in, first decide how you are going to use it.

### **Send standard instructions or information to visitors, automatically**

This might include health and safety notices, directions, or parking information.

### **Do you already have EVA Pass set up?**

[EVA Pass](#) is a reusable check-in pass for Apple Wallet or Google Pay that makes it fast and easy for visitors to check in at your EVA kiosk, and can also replace printed labels.

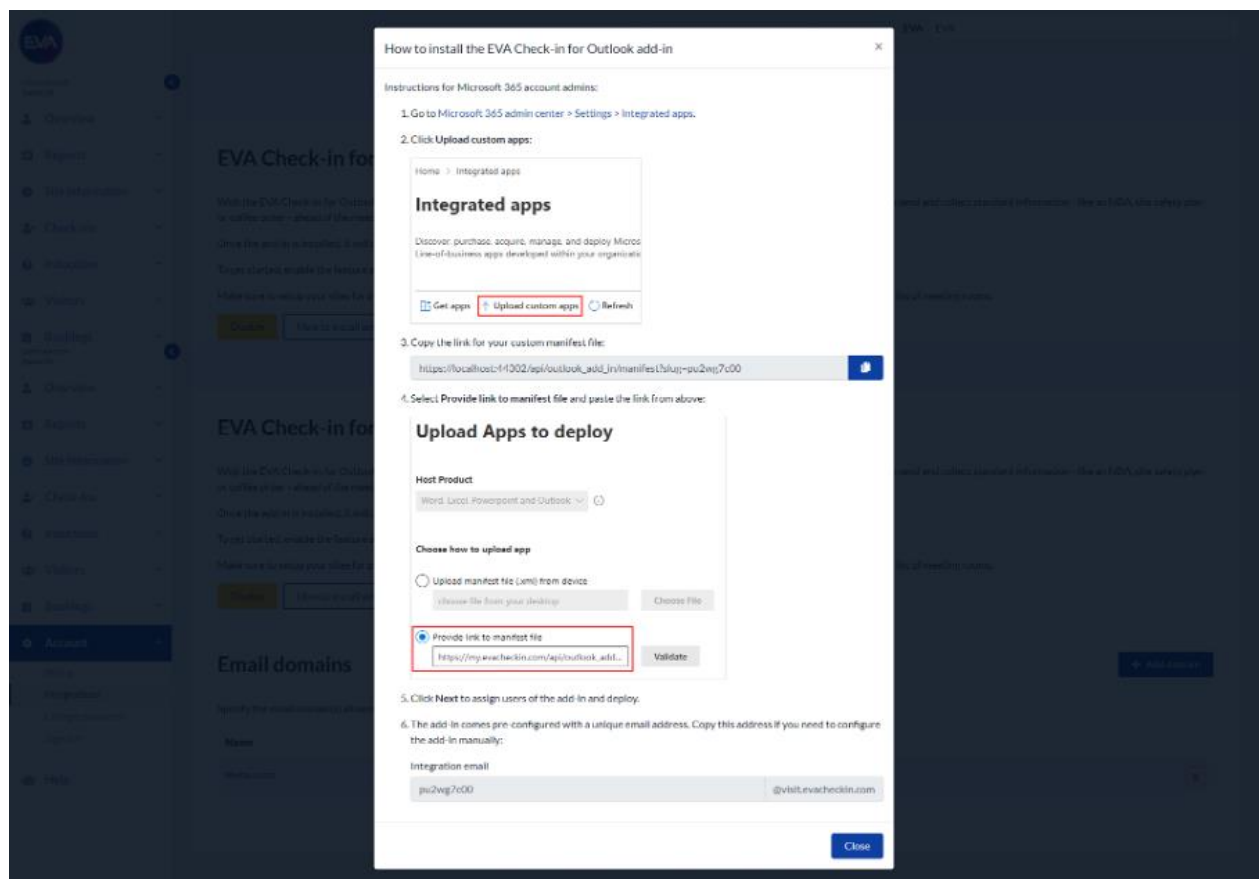
### **Do you already have a pre-registration process for visitors?**

[Custom check-in processes](#) are flexible workflows designed to help you manage compliance, meet your health and safety obligations and collect information from your guests before they arrive.

The Outlook add-in will make it easy for **all staff** to send standard information, an EVA Pass and/or pre-registration process to their external visitors, as they set up a meeting in Outlook – great for a standardised approach to visitor management.

## How to install EVA Check-in for Outlook

1. Log in to the EVA Check-in portal and go to **Account > Integrations > Pre-registration**
2. Click **Enable** and click **How to install add-in** for detailed instructions on installing the add-in to your Microsoft 365 account. You'll need to be (or enlist the help of) a Microsoft 365 account admin to complete this step.



3. Specify the email domain(s) allowed to create pre-registrations. This is normally your organisation's email domain(s):

**Integrations**

Webhooks Procure Pre-registration

### EVA Check-in for Outlook add-in

With the EVA Check-in for Outlook add-in, invite visitors to complete pre-arrival steps directly from an Outlook meeting invitation. This means you can send and collect standard information - like an NDA, site safety plan or coffee order - ahead of the meeting, and save time and congestion in your reception area.

Once the add-in is installed, it will detect in-person meeting invites with external guests and prompt you to send pre-registrations.

To get started, enable the feature and setup your email domain below.

Make sure to setup your sites for pre-registration too (Settings > Options > Pre-registration). Set the default visitor type, check-in process, and add the list of meeting rooms.

Disable How to install add-in

### Email domains

+ Add domain

Specify the email domain(s) allowed to create pre-registrations. Normally this is your company's email domain(s).

Name
company.com

4. Go to **Site information > Options > Pre-registrations** to set up your Outlook pre-registration settings per site:
- the default visitor type that will be assigned to guests registered via Outlook – eg “Visitor”
  - a list of bookable meeting rooms for that site – so the add-in can automatically detect in-person meetings. This list should match the list of rooms you can book in Outlook. If your rooms follow a naming pattern, you can use this pattern here rather than add each room manually.

**Options**

Check-in Check-in theme Visitor count threshold Label printing Notification settings Visitor notifications Pre-registrations

### Outlook add-in meeting defaults

Settings for pre-registrations created via email meeting invites. See [Integrations > Pre-registrations](#) for key settings.

Visitor type ⓘ

Visitor

Check-in process ⓘ

None

Disable check-in process feature

Outlook meeting room locations

Add all bookable meeting rooms here so new Outlook meeting invites are mapped to this site and activate the correct check-in process. If your rooms follow a naming pattern you can make a rule to match them.

Room name...	Text
Exactly matches	Meeting room 1

+ Add room

Save

5. On the same screen, optionally, add a check-in process, if you want to collect information, a declaration or waiver from your visitors ahead of time.
6. Go to **Site information > Options > Notification settings**. Make sure a Pre-registration notification method is specified (Email, SMS or both).
7. Check/edit the email and/or SMS message that will be sent to your pre-registered visitor.
8. Optionally enable EVA Passes to be sent with the pre-registration email. Go to **Site information > EVA Pass**
9. Repeat steps 4-8 for every site where you want to enable Outlook pre-registration.
10. Tell your team about the new way of pre-registering visitors. We've included some ideas about what to include in an email to your team below.

## Onboarding email template

*copy/paste and adapt to suit your business*

**Possible subject lines:** <choose/adapt to align with your business processes>

- New Outlook feature: streamline your visitors' check-ins
- New Outlook feature: invite your visitors to pre-register when you send a meeting invite
- New Outlook feature: make sure your visitors are aware of our health and safety requirements
- New Outlook feature: collect information from your visitors before they arrive for a meeting

## Email content:

Hi <Outlook user>

We're rolling out a new Outlook add-in that works with our EVA Check-in system and streamlines the check-in process for external visitors, all from a calendar invite.

### What are we using this for?

We use EVA Check-in to manage staff and visitor sign-ins, so we always know who's been here – really important in these COVID times.

EVA Check-in for Outlook is an easy way to streamline check-ins for your meeting guests before they arrive in reception, directly from a calendar invite. No extra apps or software to download.

#### <if using EVA Pass>

When you create a meeting, send an EVA Pass along with the invite. When your visitors arrive for their meeting, they just scan their pass to check in.

We also include important <health and safety / location> information ahead of time as part of this process – so you don't have type it into your email.

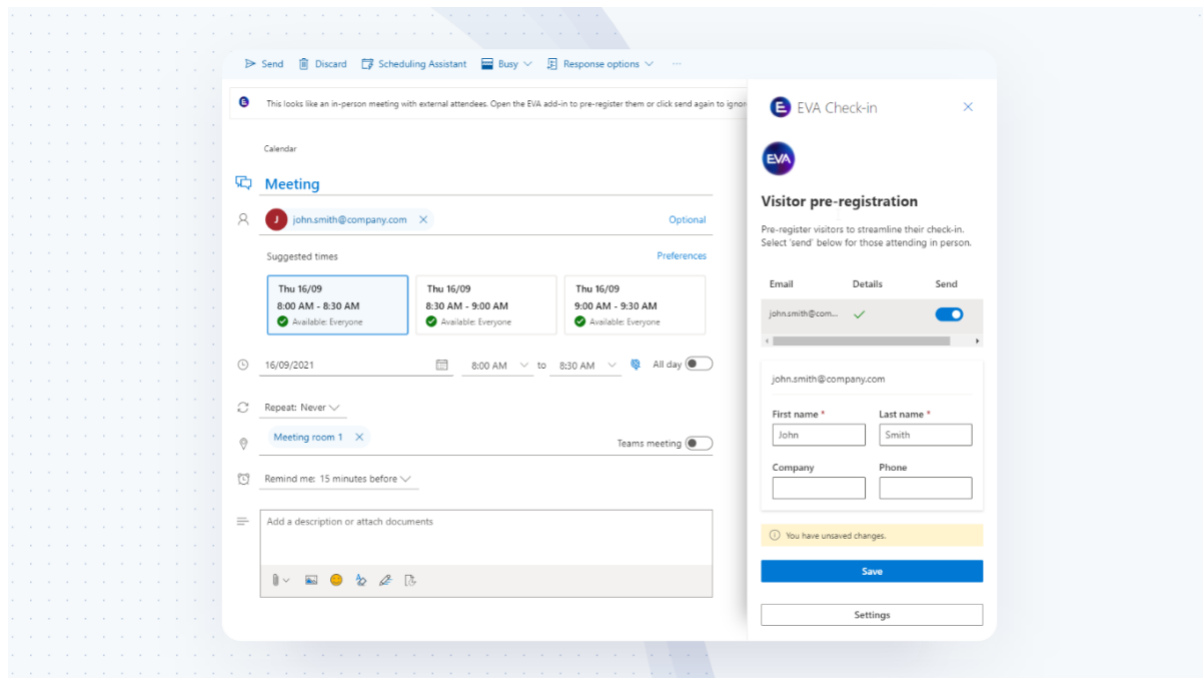
#### <if using pre-registration processes>

Pre-registration lets us understand things like <visitor tech requirements / visitor catering requirements / visitor parking requirements > ahead of time.

### How does it work?

Whenever you create an in-person (ie meeting room specified) meeting invite in Outlook (web or desktop version), you'll get a prompt to send a pre-registration to anyone you've invited from outside <your organisation name>.

<Optionally, include a screenshot:>



If you choose to send an EVA pre-registration, your visitors will get an email from EVA along with their meeting invite, <with an EVA Pass link and/or the opportunity to send some details ahead of time>. It's as simple as that 😊

## Questions?

If you have any questions about this new Outlook add-in, please contact <EVA administrator>.