Sign In App ®

Getting Started

The aim of this guide is to give you all the information you need to get started with Sign In App - if you need more detail on any of the features you read about you can view the full User Guide at **signinapp.com/docs/**

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Log in to the portal

The Sign In App portal is an online tool that allows you to easily see who is signed in to your site at any time. It provides a fully searchable history of your visitor and employee sign ins. From the Sign In App portal, you can also manage your sites, customise your Sign In App experience and turn on additional features.

Log in

If you already have an account, you can log in to the Sign In App portal from a desktop or notebook PC at **https://my.signinapp.com** with your email address and password. You can also access the portal by clicking Log in at the top of the Sign In App home page.
If you are unable to access the portal with the details provided, please contact us.

> ### Tip
>
> If you don't have a Sign In App account you can create one here: **(https://signinapp.com/trial)**. If you haven't purchased, your trial account will have access to all the standard Sign In App features that are available in the full site subscription for 15 days.

Your first sign in

Sign In App gives you a few different options for signing in visitors and employees, allowing you to choose which ones work best for your site. Get started with the quick set up guides below and follow the links to read more.

iPad app

Sign In App can be downloaded directly from the Apple App Store. On the iPad, tap on the App store icon and search for 'Sign In App Visitor Management'.
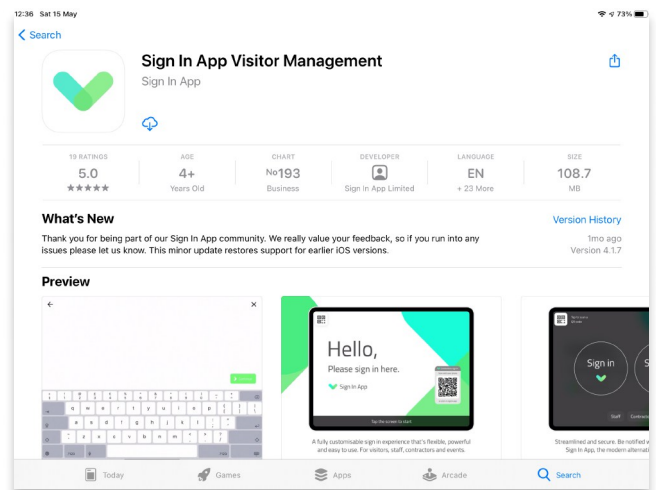
> ### Important
>
> Apple requires all iPads to be signed in with an Apple ID to download apps from the App Store. If you are not signed in with an Apple ID, you will be asked to sign in to an existing Apple ID or create a new one before downloading the app.
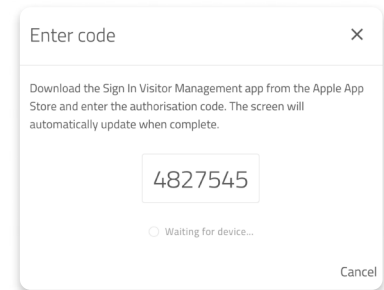
Authorisation code

The first thing you'll see after opening Sign In App for the first time is a screen asking for an authorisation code. Entering this code connects the iPad to your site and is generated from the Sign In App portal.

Generating your authorisation code

Go to the Sign In App management portal and click Manage in the top right corner.
Click **Manage > Sites > (Select site) > Devices.**
Click the Connect button and a window will appear with your unique 7-digit authorisation code.

Enter code	×
Download the Sign In Visitor Management app from the Apple App Store and enter the authorisation code. The screen will automatically update when complete.	
4827545	
○ Waiting for device...	
	Cancel

Enter your authorisation code on the iPad

Enter this code on the iPad Sign In App and tap Add Device. The iPad will instantly appear on your device list on the Sign In App portal. That's it! Your device is now connected and is ready to start signing in your visitors and employees.

Sign in

Now that you've connected the iPad with your Sign In App site you can sign in. Tap the screen, select the visitor group, complete the custom fields, respond to the messages and sign in. The sign in process is fully customisable - we'll come onto that later.

Tip - GUIDED ACCESS

To prevent visitors from exiting Sign In App you can use Guided Access which means a passcode has to be entered to leave the app.

- On the iPad, go to **Settings** > **Accessibility**, then turn on **Guided Access**.

- Tap Passcode Settings, then tap Set Guided Access Passcode.

- Enter a passcode, then re-enter it.

- Whilst guided access is enabled enter Sign In App and triple-click the home button to start guided access and press Start.

- Once you've done this, pressing the home button once won't do anything and triple-clicking the home button will require the passcode to leave the app

Companion App

Companion app is a simple and easy way for repeat visitors and employees to sign in using a smartphone. To get started you need to add yourself as a repeat visitor from the portal and send yourself an invitation. From the portal, go to **Manage > Groups > (Select repeat visitor group) > Members** and then click **Add member**. Make sure you add an email, then select Companion app from the list on the left, select the permissions you need and click Send companion app invite email.

Downloading and connecting the app

Sign In App Companion is a free download and is available from Apple's App Store and Google's Play Store. Instructions and links are included in the invitation email. After downloading the app, tap Get started and enter the 12-digit authorisation code from the invitation email.

> **Tip**
>
> If you want to send out Companion app invites to an entire group,
> email: **support@signinapp.com** and we can help.

Setting up your site geofence

Companion app uses your GPS location to confirm you are on-site. To configure what is considered your site, you need to set up a site geofence. The geofence should completely cover anywhere on the site where you need to sign in from. To set this up go to **Manage > Sites > (Select site) > Details** and click **Mobile sign in**, enter your site postcode or address and then drag the pin to the centre of your site, adjust the Radius size as necessary and click `Save`. You should now be able to sign in from Companion app on a mobile device.

Mobile sign in

Now that you've set up the site geofence, you will be able to sign in from Companion app on a mobile device. The full sign in process is supported, so if you have any messages or custom fields to agree to, these will be presented before you can sign in. When you're ready to sign out, just tap the 'Tap to sign out' button.
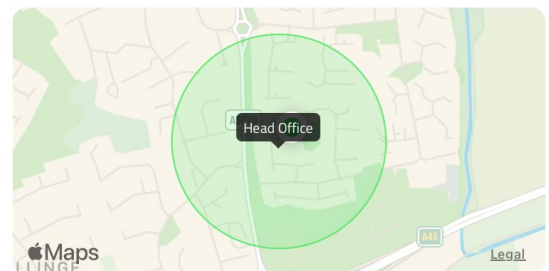
Sign in Points

Sign In Points can be used to display static QR codes so visitors can sign in without touching a device. You can print out as many copies of the static QR code as you need to cover all the entrances and exits on your site. This is great if you're catering for a large number of visitors and need to collect important data without needing to rely on a central touchpoint.

> **Important**
>
> By default, repeat visitor groups are not included in Sign In Points. To include a repeat visitor group on a Sign In Point go to **Manage > Groups > (Select group) > Data & Privacy** and toggle **Include group on contactless** on.

To get started, you will need to create your Sign In Point from the online management portal. First, go to **Manage > Sites > (Select site) > Sign In Points** and click **Add new**. Add a name for the Sign In Point and select which group it's for. You can add a message to provide any additional information or instructions the visitor should see. Once you have created the Sign In Point you will be able to download and print the QR code or poster, visitors can scan this to sign in without creating a central touchpoint.

Visitor Groups

Sign In App has three types of visitor groups allowing you to tailor the sign in experience depending on who is signing in. These are: **Standard**, **Repeat**, and **Integrated** groups. When you create an account you will see two groups - a standard visitor group named Visitors and a repeat visitor group named Staff - These two groups exist by default, but you will be able to create up to 20 different groups.

Standard visitors   👤 STANDARD

Standard visitor groups are designed for guests visiting your site; this could be their first time visiting, or they may have visited before, but they are not on-site routinely. When a standard visitor signs in they are required to complete the entire sign in process, answering all custom fields and responding to site messages. Their visit history and all associated data are stored on the system, but they will not be created as a member of a group. Standard visitors can also be pre-registered for upcoming visits. QR codes and contactless sign in links are only valid for the calendar day they are pre-registered for.

Repeat visitors 👥 REPEAT

A repeat visitor is someone who is at your site regularly. They will have a virtual visitor card with their photo, name, email address, phone number etc. This is the group type most frequently used for employees, contractors, and students. Repeat visitors can have QR and RFID codes associated with them to speed up signing in and out. They will also be able to mobile sign in with Companion app, access evacuation reports, pre-register visitors, and book spaces.

Repeat visitors can be created from the iPad app, but can also be created from the management portal by portal admins - creating repeat visitors from the portal allows you to add an individual's contact information and personal details before they sign in.
To add a member to a group, go to **Manage > Groups > (Select group) > Members** and click **Add member**.

> ### Tip
>
> You can import members using a CSV file to speed up the process of adding staff members to the group. **Manage > Groups > (Select group) > Members > Import** and download the **CSV template**. Full Name is a required field so if any name fields are left blank will cause an error. When importing the CSV file you can tick to include welcome emails and Companion app invites - you need to populate the Email field to do this.

Integrated groups ▲ INTEGRATION   G INTEGRATION

This refers to group members that are managed in one of our external supported systems such as Microsoft Azure AD or G Suite by Google. You will be able to customise the group options, personalising the sign in experience for this type of visitor, but the group members will automatically keep in sync with the integrated system. If you need to update personal field data such as email addresses, phone numbers, and staff roles you will need to do this in the external system rather than Sign In App.

> ### Tip
>
> Sign In App syncs with Azure AD and G Suite every 12 hours - at 1 am and 1 pm GMT - keeping your group up-to-date. If you need to manually sync the data, please email **support@signinapp.com**

Integrated groups are very similar to repeat visitor groups, but unlike repeat visitor groups If you need to update personal field data such as email addresses, phone numbers, and staff roles you will need to do this in the external system rather than Sign In App.

> **Important**
>
> Standard visitors are not able to use Companion app, have RFID tags connected, or use Personal fields.

Unlike repeat visitors, standard visitors can be pre-registered. This allows you to pre-populate a visitor's information before they arrive on-site, this helps to speed up the sign in process and make the visitor aware when they're visiting your site.

Pre-registrations

For a VIP experience, standard visitors can be pre-registered in advance. There are multiple ways you can pre-register a visitor giving you the ability to choose what works best for you. To configure the email that is sent to a pre-registered visitor go to **Manage > Groups > (Select standard visitor group) > Pre-registrations**, from there you can edit the email subject and message. When pre-registering a visitor you can enter their name and any responses to custom fields such as company, email or who they're visiting and this information will be pre-populated when they sign in.

On the day

With contactless enabled, the pre-registration email will have a button; tapping this will open a camera. To sign in just use the camera to scan the QR code on the Sign In App welcome screen. If you're not using contactless there will be a QR code instead, you can present this to the QR code scanner in Sign In App. Alternatively, from the iPad, you can start typing your name and select pre-registration.

Tap to sign in
Tap this button when you arrive

Tap to sign out
Tap this button when you leave
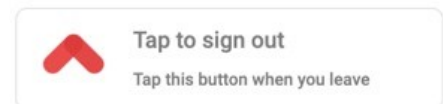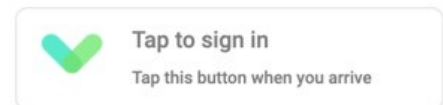
Create a pre-registration

To create a pre-registration from the portal, go to Today and select the standard visitor group, then click Pre-register. Use the dropdown on the left to select Pre-registrations to view upcoming visitors. From Companion app, tap the + button in the top right corner and select Pre-register a guest.

Custom fields

Custom fields allow you to collect the data you require when a visitor signs in or out. Custom fields are group and site-specific allowing you to have different questions depending on the location and visitor type. Unlike personal fields, custom fields are asked each time a visitor signs in, so they are suited best to questions where the answers are likely to differ on each individual visit.

To set up custom fields, go to **Manage > Sites > (Select site) > Custom fields** and click **Add new**. From here you can set up custom fields to be asked on sign in and sign out. This can be a combination of personal data, health screening questions, and other visitor data. The field type is customisable so you can get the response in the correct data format.

☰	Email	Visitors	✎	🗑	☆
☰	Visiting	Visitors	✎	🗑	☆
☰	What is your temperature?	Visitors	✎	🗑	☆
☰	Do you have any symptoms of Covid-19?	Visitors	✎	🗑	☆

Tip

If you'd like to send notifications to staff members when a visitor signs in you need to ensure you have a custom field set up with the field type **Notify list**. This will allow visitors to search and select from your repeat visitor groups for their host.

Rejected sign in

When using the **Yes or no question** or **Dropdown** you can reject a sign in depending on the visitor's response to the custom field. Just edit a custom field and select the response that should trigger the rejected sign in and add a message - this will be displayed on the screen when the rejected sign in happens.

You can set up a notification to ensure the correct person is aware when a sign in is rejected. To do this, go to **Manage**, scroll down to **Notifications** and click **Add new** to create the new notification. Add the name of the notification and select the sites and groups this rule applies to, set the Trigger to Rejected sign in and select the channel you'd like to be notified through. Once this is completed you will receive a notification when a visitor sign in is rejected.

Personal fields

Personal fields, which are similar to custom fields but are permanently stored on the system, can only be asked on the first sign in and are only applicable to repeat visitor groups. By default, your staff group will have Email, Phone number, and Role as system personal fields and they won't be asked on the first sign in. Add and edit personal fields by going to **Manage > Groups > (Select repeat visitor group) > Personal fields**. Edit a personal field and you can set it to be asked on first sign in, this helps to collect the information you may not have when you set the group up.

> ### Important
>
> Companion app invites and host notifications require repeat visitors to have a valid email address for the invites and notifications to be sent to. Add an email to each staff member to make use of these features.

Messages

An important part of visitor management is presenting guests with policies and terms relevant to their visit. Sign In App gives you flexibility in how you configure these messages for each visitor group. Messages are displayed after the custom and personal fields have been completed. Get started with the quick set up guides below and follow the links to read more. To get started, go to **Manage > Sites > (Select site) > Messages** and click **Add new**. Add the title of the message, any text content, and how you'd like the visitor to agree to the message.

> ### Tip
>
> You can attach images (.jpeg/.png), PDFs, and videos (.mp4) to sign in messages.

Next, you need to select which group the message should display for. Toggle on **Email a copy of the agreement to the visitor** to email a copy of the message as a PDF to the visitor who just signed in. To email a copy of the message to the visitor, one of your custom fields **MUST** be an email address.

> ### Important
>
> For repeat visitors, you can select how often the message is presented to the visitor. Messages will be redisplayed each time a standard visitor signs in.

Branding

Your custom background image is the first thing your visitors and staff will see when signing in, so it's important to make a great first impression. To set your site branding, from the portal go to **Manage > Sites > (Select site) > Branding** and click **Upload a new image** to add your branding to any iPads connected to that site. You need to ensure the image you're uploading is **2048px wide** by **1536px high**.

> **Tip**
>
> You can use a video instead of an image, just click Advanced options and then upload your mp4 or MOV file. The max file size is 50MB.

Portal users

When you start a trial and create a Sign In App account you are added as a primary user with administrator access. To add other portal users, go to **Manage** and scroll down to the **Manage account**, click **Account info** and then select **Add new**. Complete the portal users name, email, password, select the sites they have access to, their user role, and if they should be a technical contact. Technical contacts will be sent an email when a device goes offline.

> **Tip**
>
> You can add a password for a portal user and ask them to visit my.signinapp.com/forgot to set their password.

Roles and permissions

Receptionist

There are two default portal user roles, standard and administrator. Administrators have full portal access, including sites, and events. Standard users have access to the Today, Evacuation list and Reports sections of the portal, but not to Manage. You can create new portal user roles and configure the permissions for each of these roles. When editing a portal user you can set them to your custom role.

My profile

Click the Account button in the top right corner of the portal and then select My profile - from here, you can edit your profile details including your name, email address, password and security options. We also recommend enabling two-factor authentication for increased security.

Data & privacy

Sign In App gives you the tools you need to manage data securely whilst the privacy of visitors, employees and contractors are respected - you can decide what data is stored and for how long.

Site privacy settings

From the Sign In App portal, go to **Manage > Sites > (Select site) > Privacy** to view and edit the site's privacy settings.

Show autocomplete for returning visitors

Toggling this on will allow visitors who have signed in previously to have some of their information remembered, helping to speed up the sign in process.

Only show pre-registered names with an exact match

When your pre-registered visitors arrive, a list of pre-registrations appears on the iPad app - if this option is toggled on, visitors will be required to type 3 letters before pre-registrations are shown.

Hide visitors on the sign out list

When your visitor signs out, a list of currently signed in visitors is displayed - if this option is toggled on, visitors will be required to type their name to sign out.

Group data & privacy

To configure your group data retention period & privacy options, go to **Manage > Groups > (Select group) > Data & Privacy**. You can store visitor, employee and contractor data in line with your organisation's data & privacy policy. From here, you can select how long visitor history is stored for, anywhere from 7 days to indefinitely. To configure this, use the dropdown under **Keep visitor data** and select time timeframe.

> **Important**
>
> If you'd like members of a repeat visitor group to appear as an option for a visitor to select as their host, ensure that Include group on the site notify list is toggled on.
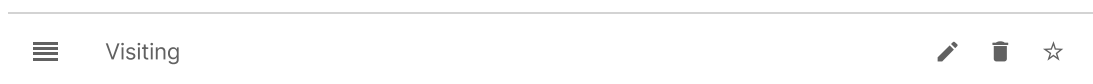
Notifications

Sign In App supports two different types of notifications, **host notifications** and **group notifications**:

> Host notifications let a member of staff know when their visitor has arrived.

> Group notifications are designed for general awareness, allowing you to notify a person or team when an event happens, this could include notifying security when a visitor signs in, or when a health screening question is failed.
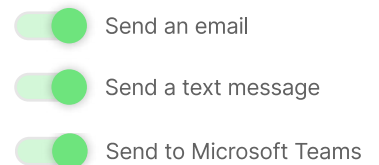
Host notifications

When your Sign In App account is created, host notifications are set up by default. Host notifications are configured from two sections of the portal.

> You need to ensure there is a custom field with the Field type of **Notify list**. This allows the visitor to search the members of your repeat visitor groups to select the person who shall be hosting their visit. To set this up go to **Manage > Sites > (Select site) > Custom fields**. If you edit a field you can check the field type and which group the custom field is applied to - for host notifications it needs to be your visitors group.

> Go to **Manage > Groups > (Select host group) > Notifications** and set When a visitor signs in to **Notify their host**. Then select the type of notification they should receive, either **email** or **SMS**. If your group is integrated with Azure AD you can send the notifications through MS Teams

Group notifications

To set up a group notification rule, go to Manage and then scroll to Manage account, select Notifications and then Add new. From here you can configure a notification to be sent when certain criteria are met. In the example below, a notification will be sent by email when a visitor signs in to the Head Office site.

> ## Tip
> Advanced filters on group notifications allow for much greater customisation of the conditions that cause a notification to be sent.