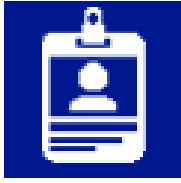


# Onsite Portal

Last Modified on 04/08/2024 1:00 am EDT



The Onsite Portal allows your onsite team (including temporary staff) to perform various tasks without needing full access to EventsAir. Logged in users can see and edit basic Attendee information, check-in attendees, register new attendees (walk-ins), print name badges, and review badge printing statistics.

[Read more about using the Onsite Portal here.](#)

## Setting up the Onsite Portal

### Details

As for all apps/portals, you need to set up a name, Alias (URL), brand, live dates, and messaging for before and after the app is live. [Read this article for more information.](#)

### Settings

- **More Info** – Select a [Merge Doc](#) that can be displayed on the Attendee's Detail page in the portal.
- **Administrator PIN** – Add security to critical functions by requiring a PIN. If set up here, a user must enter the PIN if they want to:
  - print a badge for users with outstanding payments
  - reprint a badge that has already been printed
- **Name Badges** – Select one or more Name Badges that can be printed from the Attendee's Details page in the portal.
- **New Record Sites** – Select one or more Interactive Sites that can be used to register new Attendees for your event. As this App is designed to be used at a busy registration desk, it is recommended that you set up a smaller, faster version of your normal Registration Interactive Site, to capture the minimum required information quickly. For example, your site may contain just basic Attendee Name information, Registration information, and a Payment page.
- **Enable Express Check In** – When selected, this option lets you perform an attendee search and in a single operation, automatically check-in and print the attendee's name badge.

### Localization

#### Changing the wording in the app/portal

Changes made to the default language in Application Settings will affect all events. However, you can still make unique local changes for each portal in each event in the Portal Setup. [Read more about Localization.](#)

## Content

Configure the Navigation link description, the Heading, and the page Content for the following portal pages:

- Sign-in Page
- Home Page
- Help Page
- Search Page

## Users Tab

In this tab, you set up who's allowed to access the portal. To add a new user, click the plus sign next to **App Users**, and complete the fields below. When you've finished adding users, press **Save**.

**Note:** You must set up **Users** here before anyone can use this portal.

Click on **App Users** to create a new user, then fill in the following:

- **Email Address**
- **Password**
- **First Name**
- **Last Name**
- **Organization**
- **User Type** – (Leave as Basic – the default. No other user types for this app.)
- **User Level** – (Leave as Standard – the default.)
- **Is Disabled** – check this to disable the account, so the user cannot sign in.
- **Last Logon** – shows the date and time this user last signed in.

### *Access Logs*

This tab, under users, shows the details of every time this user has signed in to the Portal. Here you can review the date and time of access, the originating IP address, and any actions taken.

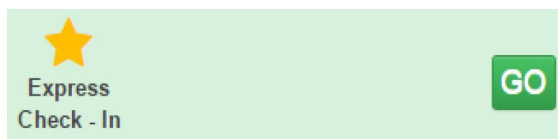
## Using the Onsite Portal App

### Search Tab

When an attendee arrives, entering their name (or part of their name) into the Search box and pressing the Search button will display a list of matching names. Selecting one allows viewing of the Attendee's details.

Clicking on **Last Record** will show the most recently selected Attendee (within this logged in session).

If Express Check-in has been enabled, and the searched record has no outstanding charges present, an option to bypass the Edit screen and go directly to badge printing will be displayed.



## Details View

In the details view, the following tools are available:

- Edit contact details
- Add/Replace Photo (including cropping – see [Attendee Photo Management](#) for more details)
- Print Delegate Badge
- Check-in / Undo Check-In
- Record Payment (when payment is processed in external system)
- Online Payment (collect payment details in an Interactive Form)

## New Record Tab

Clicking on the New Record tab will display a Registration button for each available Interactive Site (based on which site or sites you enabled in "New Records Sites" in the App setup).

## Statistics Tab

Displays details of how many badges have been printed and check-ins processed.

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