splan

Visitor Management System

Admin Guide

Contents

Introduction

Purpose

This Admin guide explains the various options available to the customer to configure the Splan Visitor Management system as desired.

Intended Audience and Reading Suggestions

This admin guide is intended to be used by the system administrators who will be responsible for setting up the Visitor Management System.

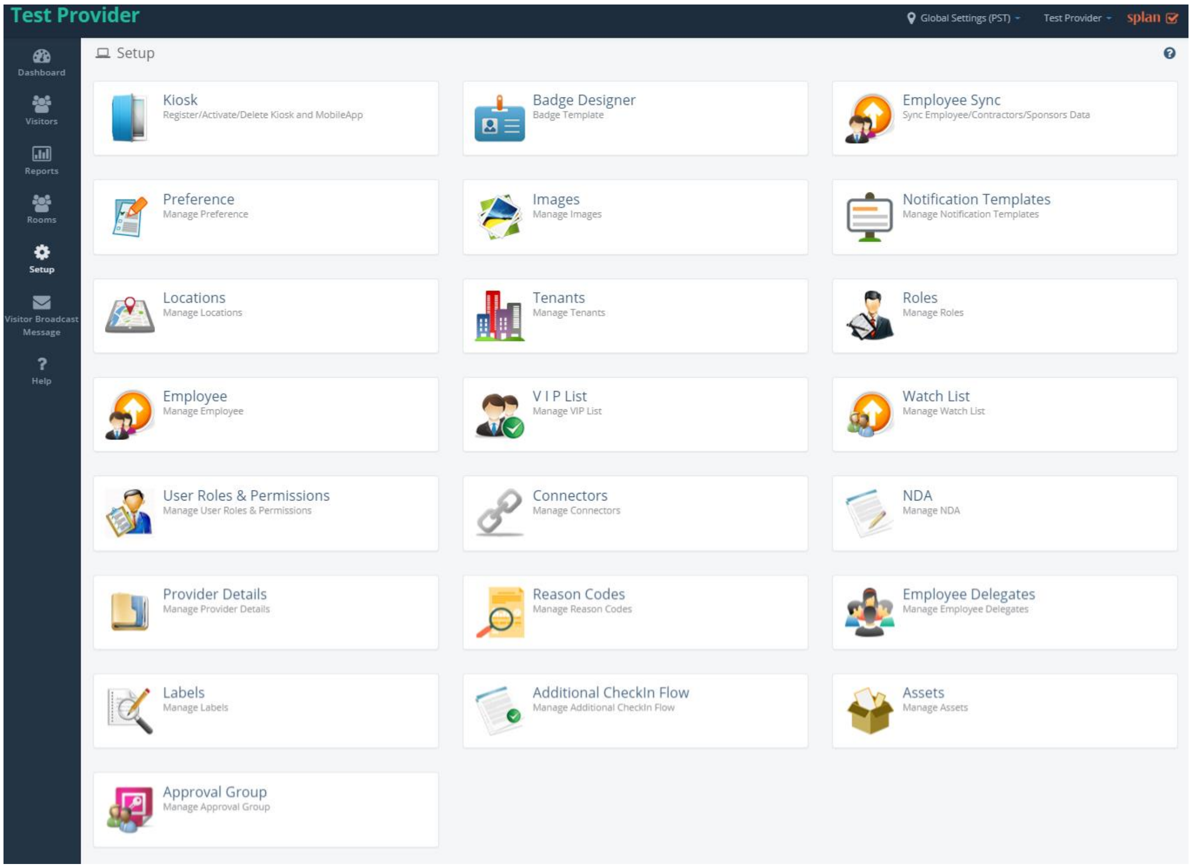
Support

For additional support on installation procedure and guidelines, reach out to us at:

Phone:	+1 510 320 3305
Email:	support@splan.com
Support Portal:	http://support.splan.com
Website:	www.splan.com

Overview

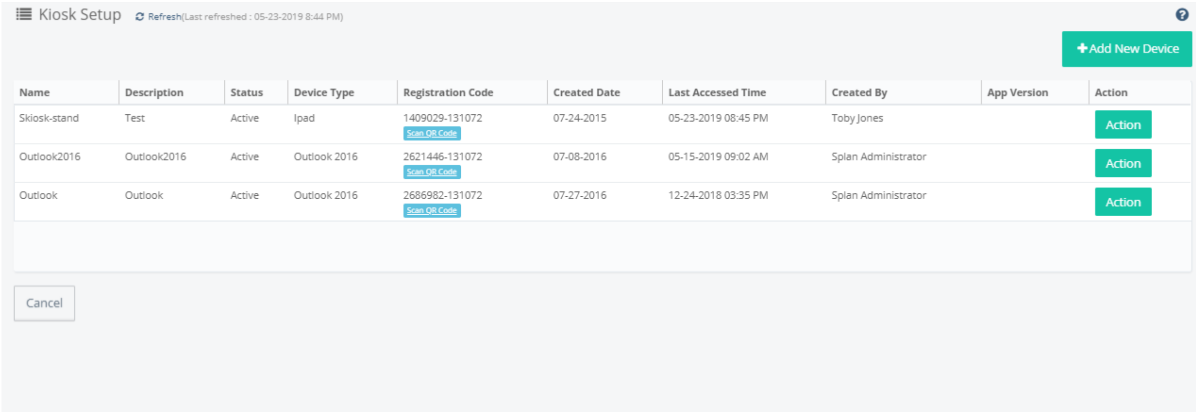
Once the Splan Visitor system is installed successfully, this guide can be used to set up the system as per business processes. After logging in, under Global Settings (Global Location), click on Setup to access the different options that can be configured for the application.



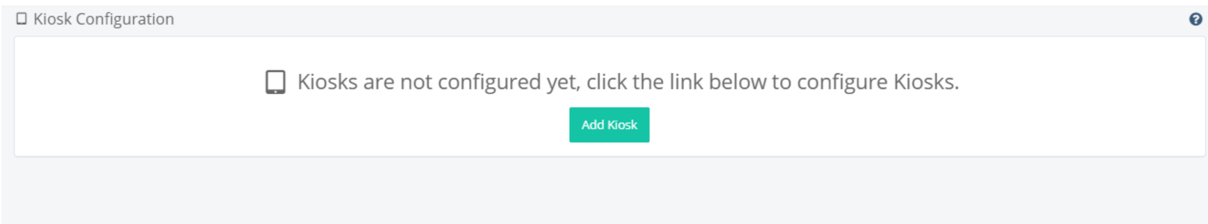
Kiosk

The kiosk component allows the admin to configure the self-service kiosk for each active lobby/location. In order to perform this activity, select the location for which the kiosk is to be configured. Once in the selected location, navigate to Setup -> Kiosk.

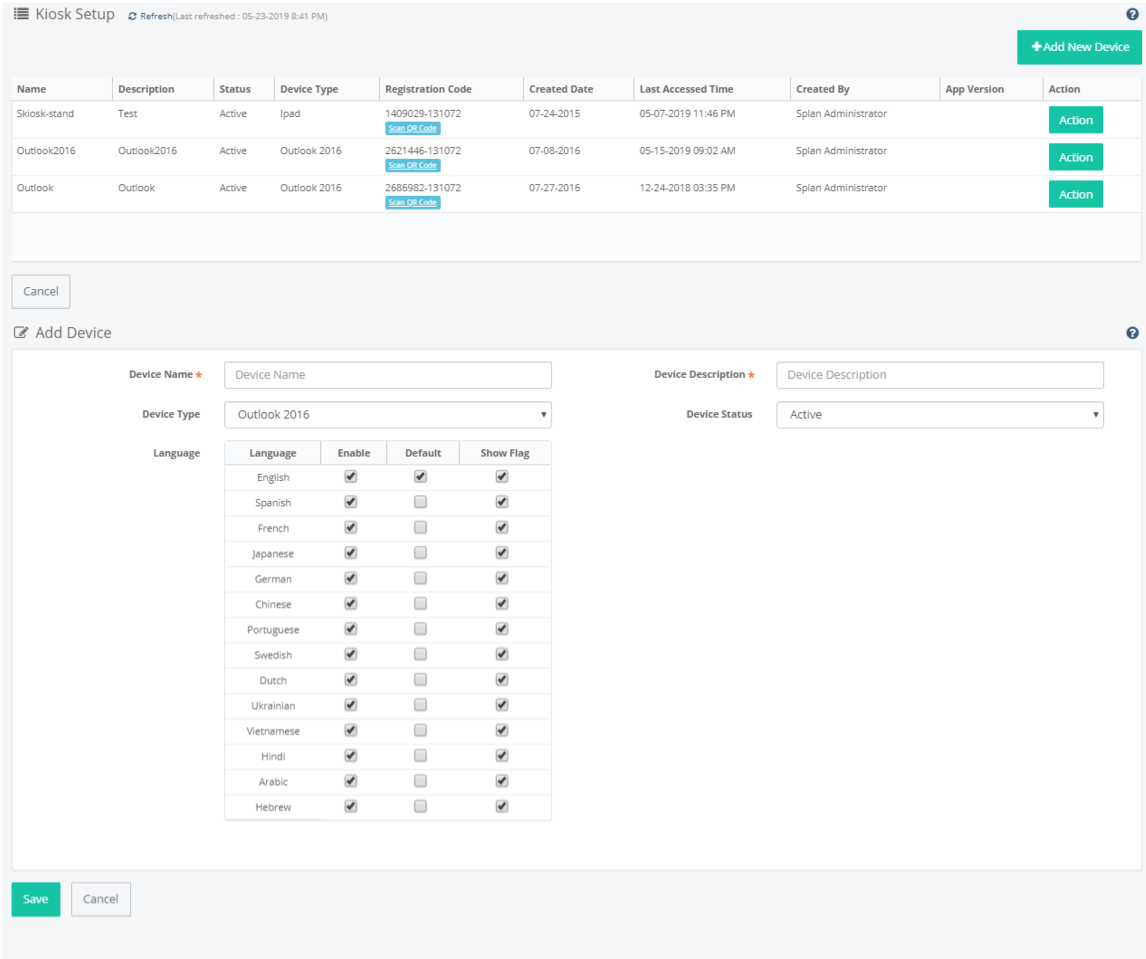
Clicking on Kiosk, displays the Kiosk Setup page. If devices are already configured a list of these devices is displayed.



If no device has been configured yet, the following screen is displayed



1. To add a new device, click on the ‘+Add New Device’ button.
2. The ‘Add Device’ grid is displayed. Enter all the required details here such as the Device Name, Device Description and Device Status. Select the relevant Device Type from the dropdown field provided.
3. The device can also be configured to display a particular language by default. You can also configure the device to support multiple language options. Use the Language section to enable multiple languages and select a default option
4. The ‘Show Flag’ column provides the option to display the flag corresponding to the configured language



5. Once all the details are entered, click on the Save button. The device is successfully added

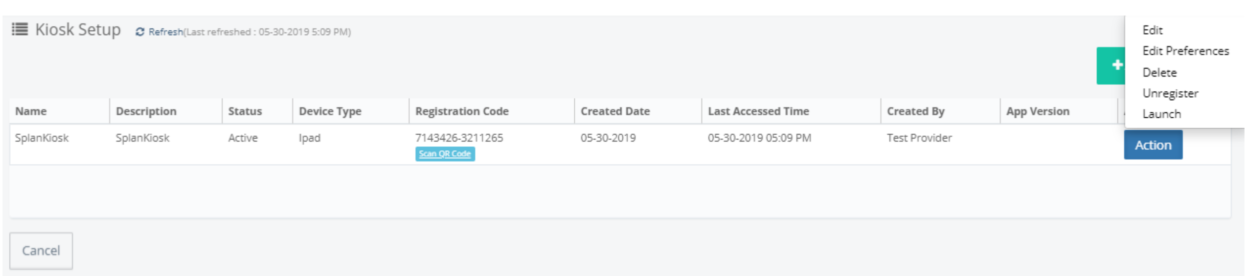
6. Clicking on the Action button against a device record displays the following options:

A) Edit

B) Edit Preferences

C) Delete

D) Unregister (OR) Register



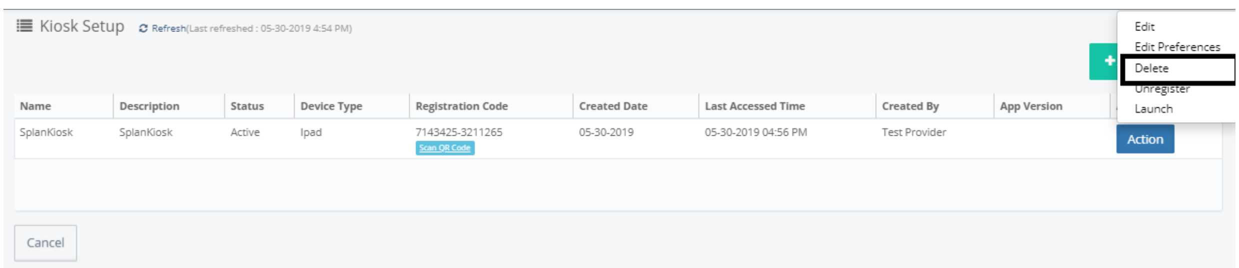
7. The ‘Edit’ option can be used to update device details. Update device details in the Edit screen and click on Save to update the details.

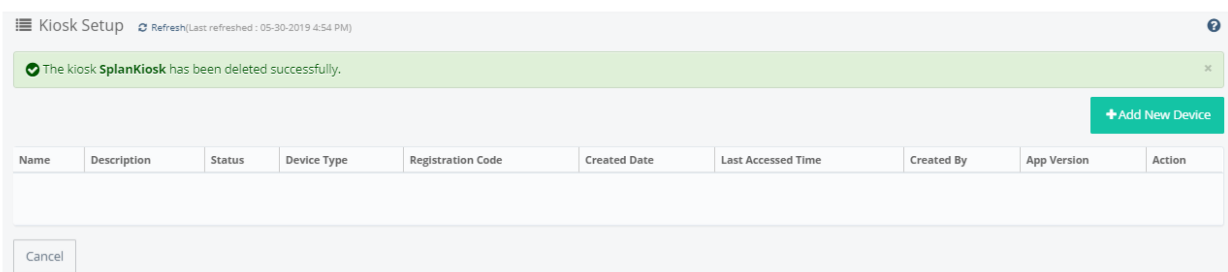
8. Kiosk preferences can be accessed when the ‘Edit Preferences’ option is selected. You can update the preference options based on the configuration desired

9. Use the Unregister option to unassign a kiosk that is configured for a location.

10. Once unregistered, the ‘Register’ option is displayed. Click on Register, and then enter the kiosk Registration code into the device to configure the self-service kiosk for the lobby. You can also use the Scan QR Code option at this point. Click on the Scan QR Code link and scan the image from the Splan kiosk app. Once done, the version of the application that is configured on the self-service kiosk is populated under the App version column for that device

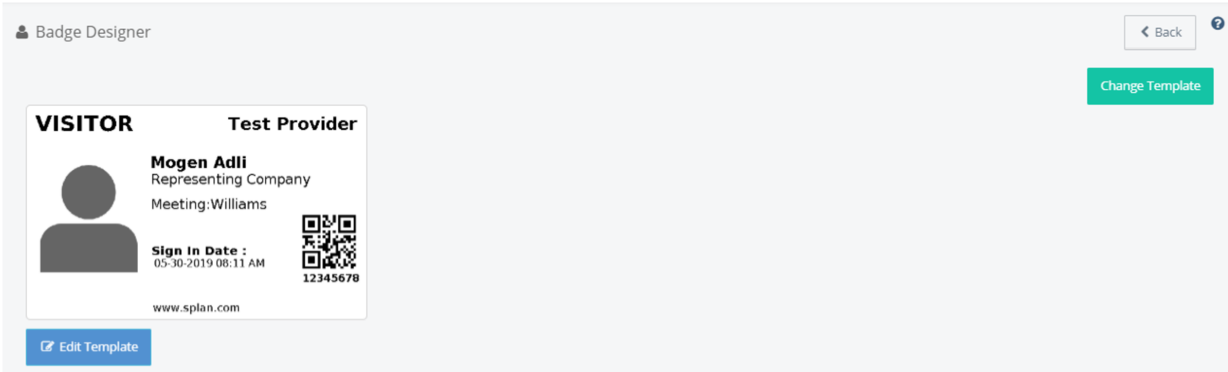
11. In order to delete a device, use the Delete option. Please note that you will no longer be able to view the deleted device details





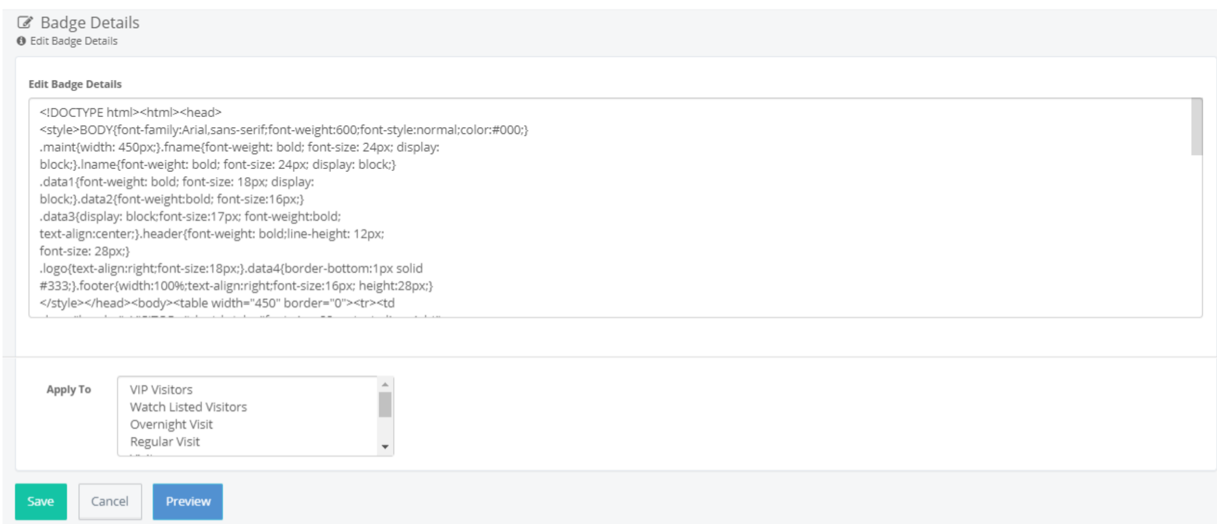
Badge Designer

The Badge Designer module allows you to configure the layout of the badge template based on your business requirements. Click on the Badge Designer component in Setup to view the configured templates.

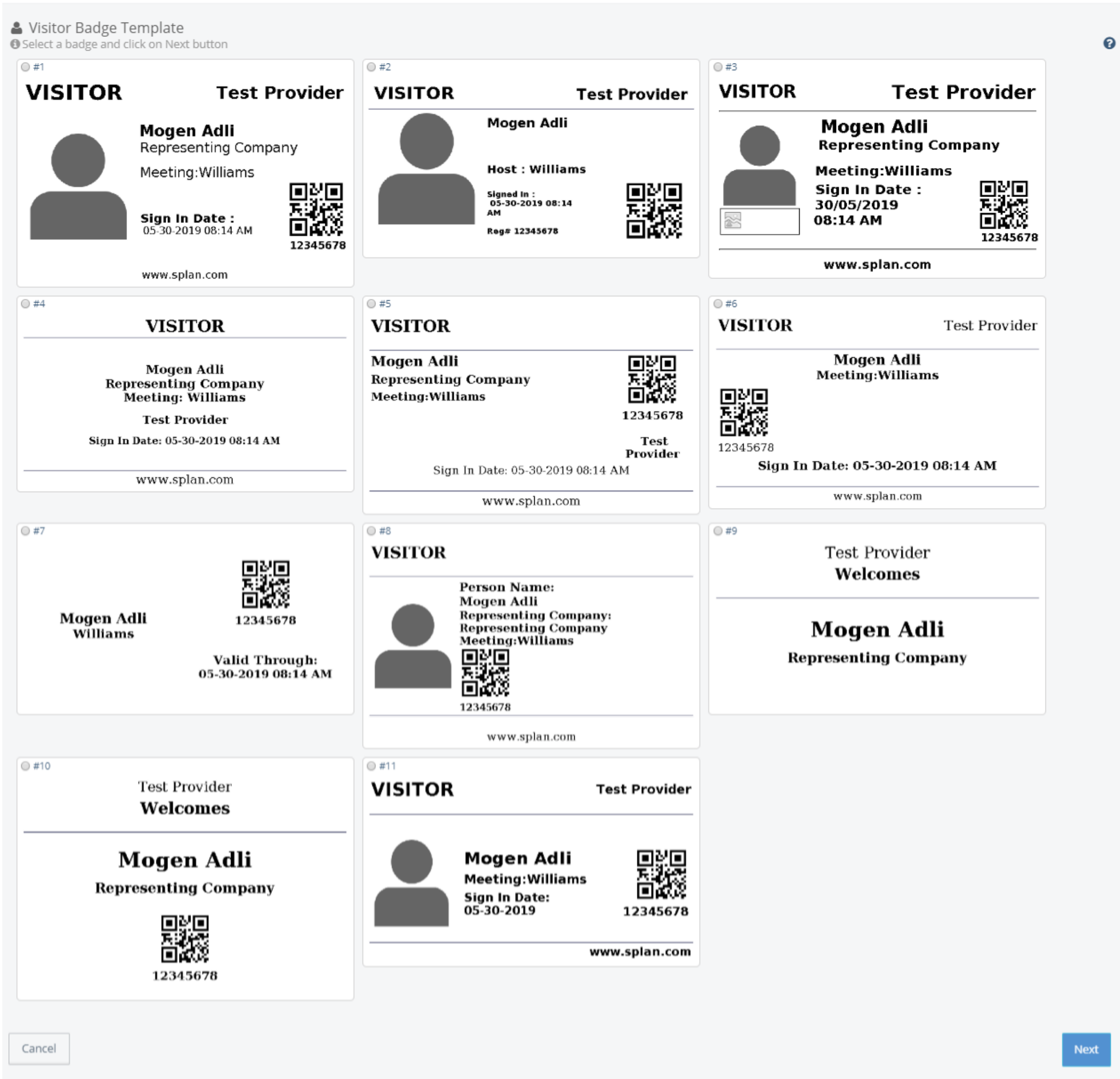


1. Click on the ‘Edit Template’ button under the badge template to view the Badge Details page. Here the admin can customize the badge layout in the Edit Badge Details section to include any changes needed from a business perspective. A badge template can also be configured for specific visit/visitor types using the options in the multi select ‘Apply To’ field.

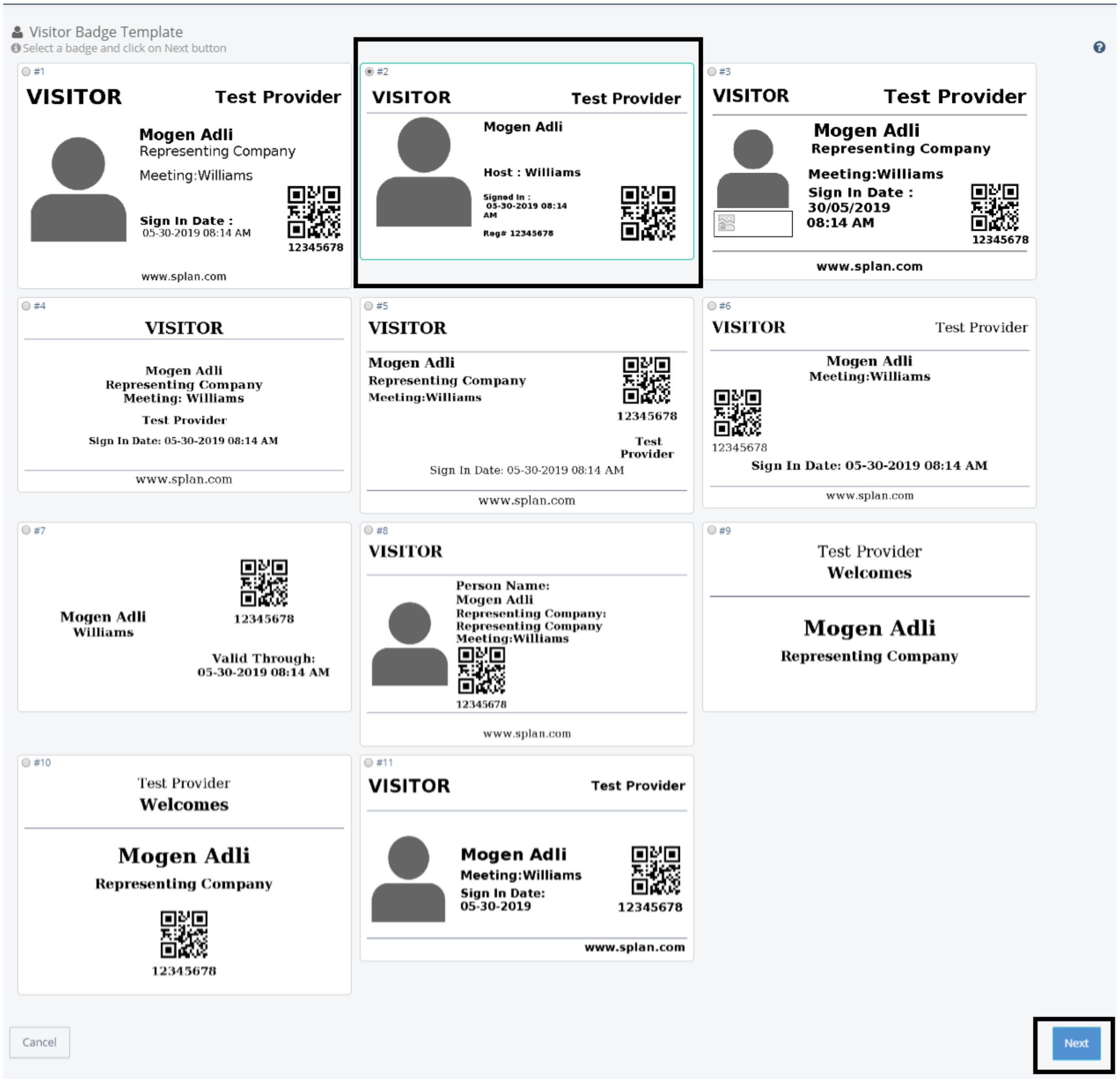
2. Once the changes are done, click on ‘Preview’. This action displays the badge layout based on the changes made. Changes can be made if necessary based on the reaction to the preview.



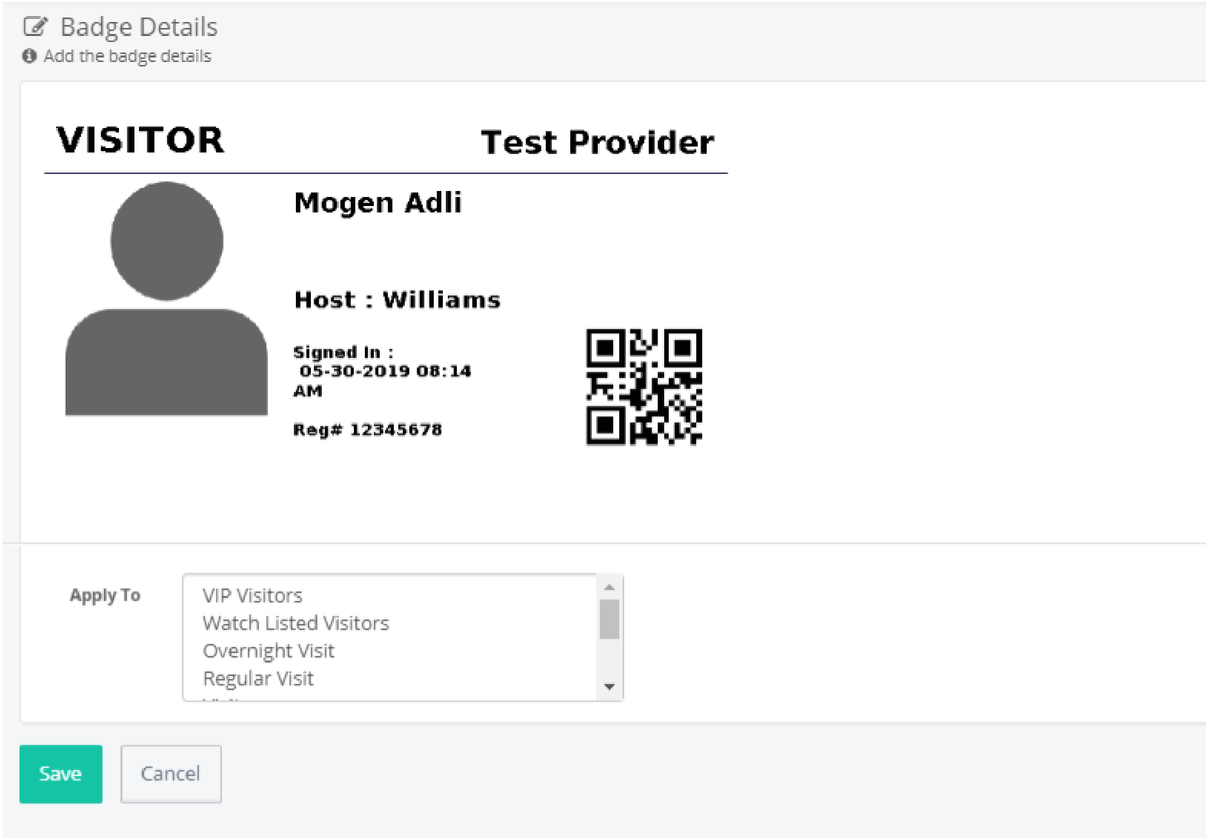
3. The application comes with pre-defined badge templates that the customer can select from. To access these templates, click on the Change Template button on the Badge Designer page. The templates will be displayed as below:



3. Select a template by clicking on the radio button on the top left corner of the desired template and then click on Next to continue with the edit.

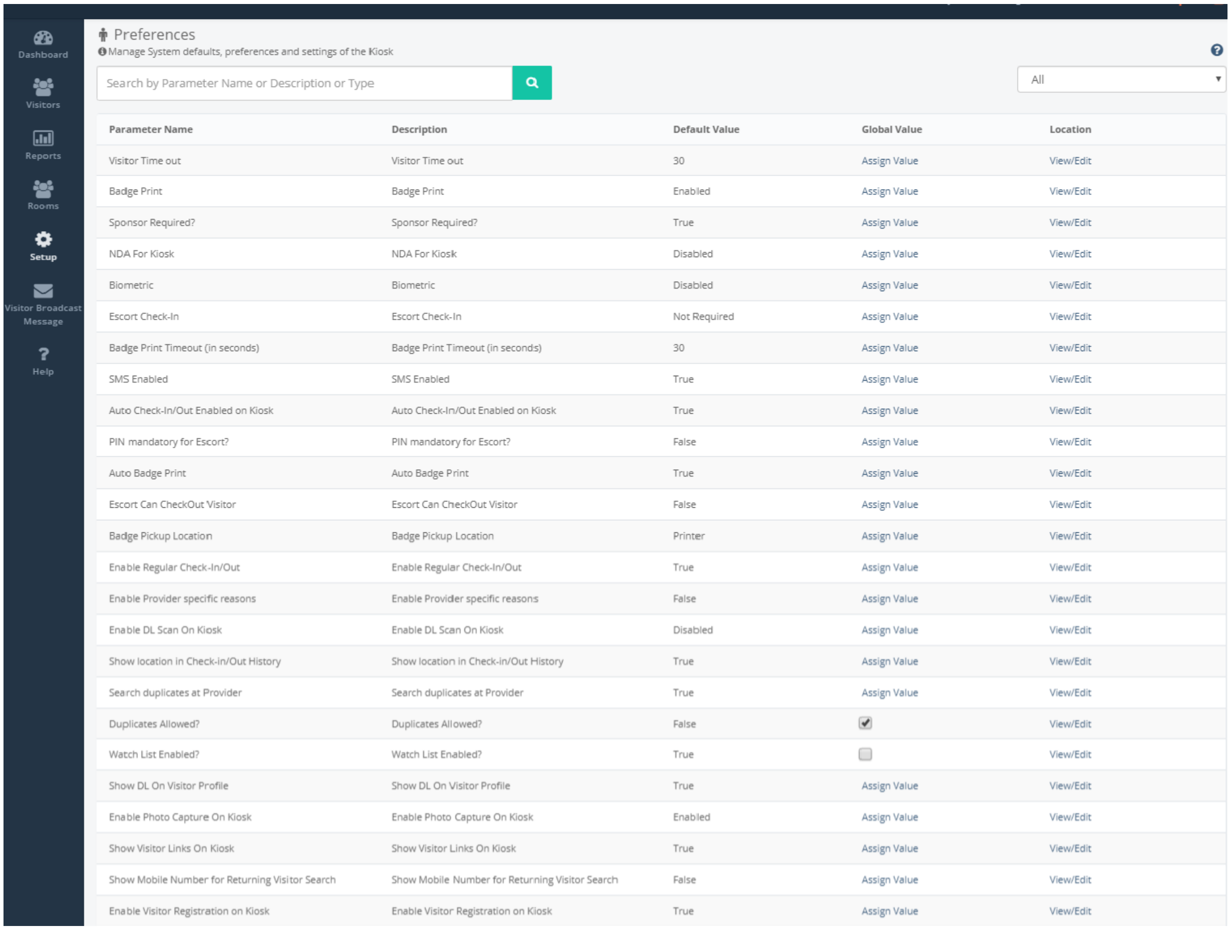


4. Select the type of visits/visitors that the badge must be applied to in the ‘Apply To’ field. If left blank the badge gets applied to all visit types and visitors. Click on the Save button to save the changes or click on Cancel to go back to the templates and choose another option.



Preferences

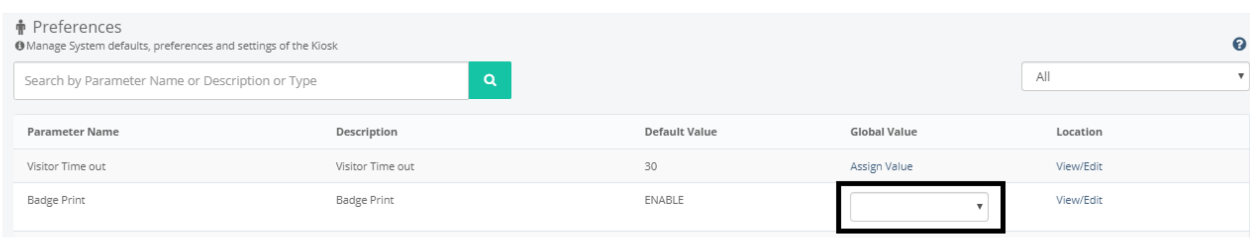
Different preference parameters can be changed to configure workflows at the global and location levels as per business processes. Splan also provides default values for preferences that can be retained and used if the customer so desires.



Parameter Name	Description	Default Value	Global Value	Location
Visitor Time out	Visitor Time out	30	Assign Value	View/Edit
Badge Print	Badge Print	Enabled	Assign Value	View/Edit
Sponsor Required?	Sponsor Required?	True	Assign Value	View/Edit
NDA For Kiosk	NDA For Kiosk	Disabled	Assign Value	View/Edit
Biometric	Biometric	Disabled	Assign Value	View/Edit
Escort Check-In	Escort Check-In	Not Required	Assign Value	View/Edit
Badge Print Timeout (in seconds)	Badge Print Timeout (in seconds)	30	Assign Value	View/Edit
SMS Enabled	SMS Enabled	True	Assign Value	View/Edit
Auto Check-In/Out Enabled on Kiosk	Auto Check-In/Out Enabled on Kiosk	True	Assign Value	View/Edit
PIN mandatory for Escort?	PIN mandatory for Escort?	False	Assign Value	View/Edit
Auto Badge Print	Auto Badge Print	True	Assign Value	View/Edit
Escort Can CheckOut Visitor	Escort Can CheckOut Visitor	False	Assign Value	View/Edit
Badge Pickup Location	Badge Pickup Location	Printer	Assign Value	View/Edit
Enable Regular Check-In/Out	Enable Regular Check-In/Out	True	Assign Value	View/Edit
Enable Provider specific reasons	Enable Provider specific reasons	False	Assign Value	View/Edit
Enable DL Scan On Kiosk	Enable DL Scan On Kiosk	Disabled	Assign Value	View/Edit
Show location in Check-in/Out History	Show location in Check-in/Out History	True	Assign Value	View/Edit
Search duplicates at Provider	Search duplicates at Provider	True	Assign Value	View/Edit
Duplicates Allowed?	Duplicates Allowed?	False	☑	View/Edit
Watch List Enabled?	Watch List Enabled?	True	☐	View/Edit
Show DL On Visitor Profile	Show DL On Visitor Profile	True	Assign Value	View/Edit
Enable Photo Capture On Kiosk	Enable Photo Capture On Kiosk	Enabled	Assign Value	View/Edit
Show Visitor Links On Kiosk	Show Visitor Links On Kiosk	True	Assign Value	View/Edit
Show Mobile Number for Returning Visitor Search	Show Mobile Number for Returning Visitor Search	False	Assign Value	View/Edit
Enable Visitor Registration on Kiosk	Enable Visitor Registration on Kiosk	True	Assign Value	View/Edit

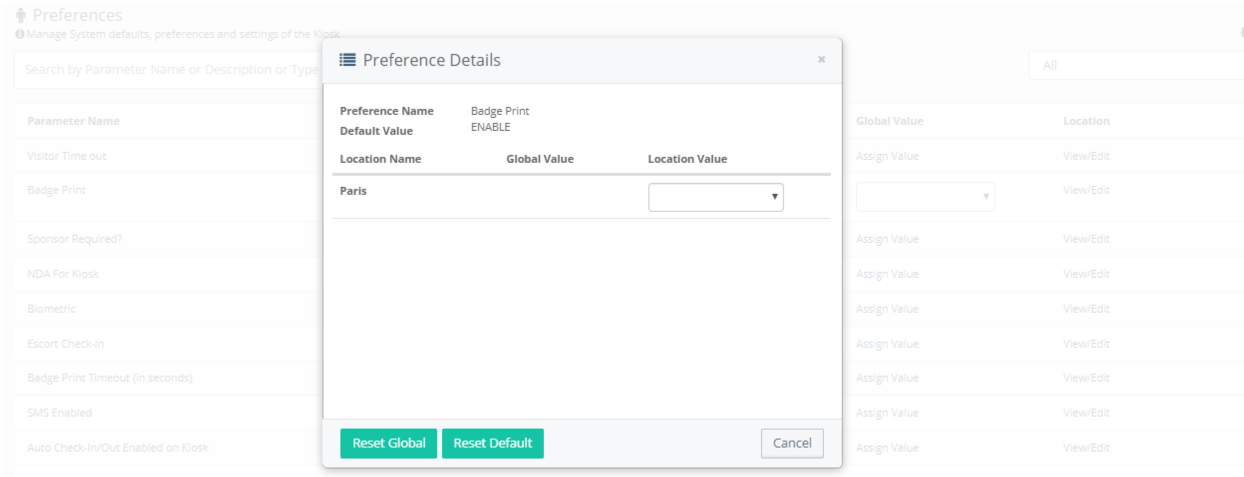
1. A dropdown field at the top right corner allows the user to filter specific preference sets based on functionality, device and workflows.

2. Click on 'Assign Value' under the Global Value column to change a preference at the Global level. This value then overrides the default value and gets carried over to the location level as well.



Parameter Name	Description	Default Value	Global Value	Location
Visitor Time out	Visitor Time out	30	Assign Value	View/Edit
Badge Print	Badge Print	ENABLE		View/Edit

3. To change the preference for a specific location, click on View/Edit under the Location Value column.

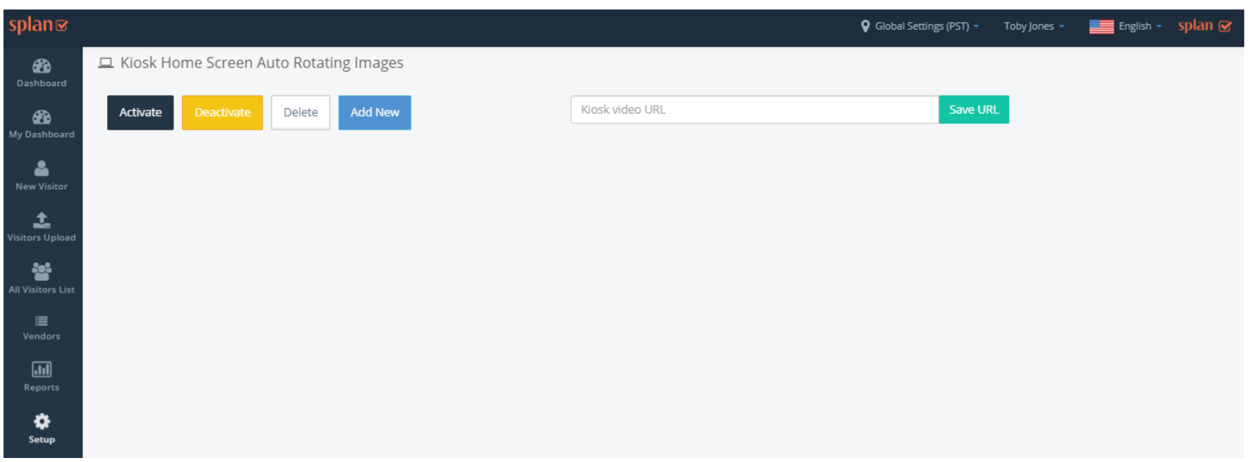


4. A pop-up is displayed with the list of locations and fields corresponding to each location.

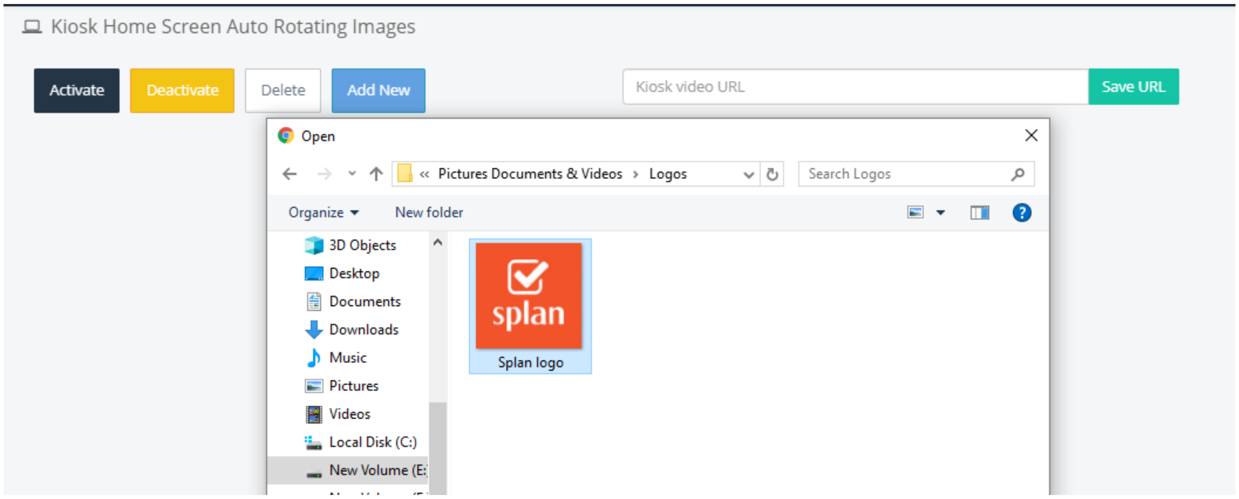
Images

Use the Images component to add/edit/delete images and videos to be displayed on the self-service kiosk configured for your lobbies.

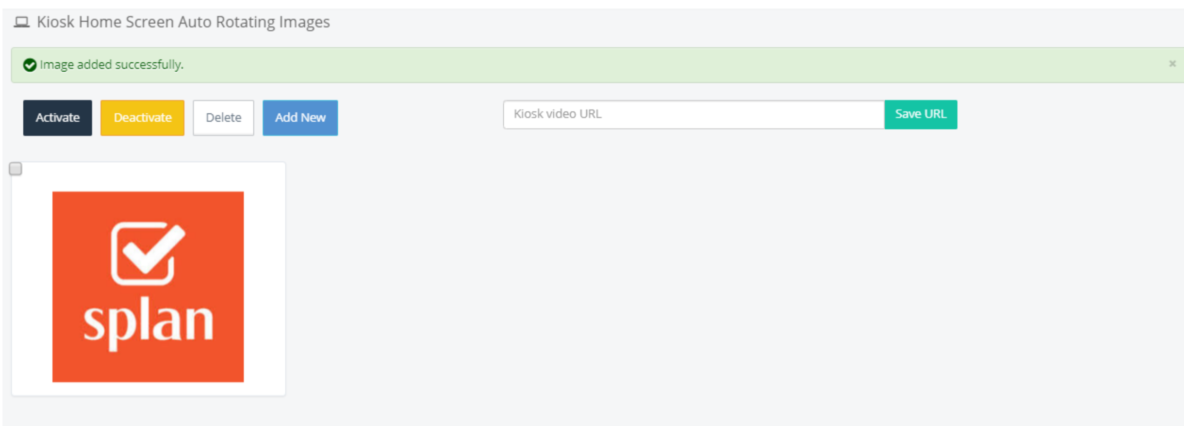
The admin can activate/ deactivate/ add new/ delete kiosk images. Video files (.mp4) can also be uploaded along with images. A video URL can also be provided.



1. To upload an image or video file click on Add New and select the image or video file



2. The uploaded image/video file is displayed along with a checkbox on the top left corner.



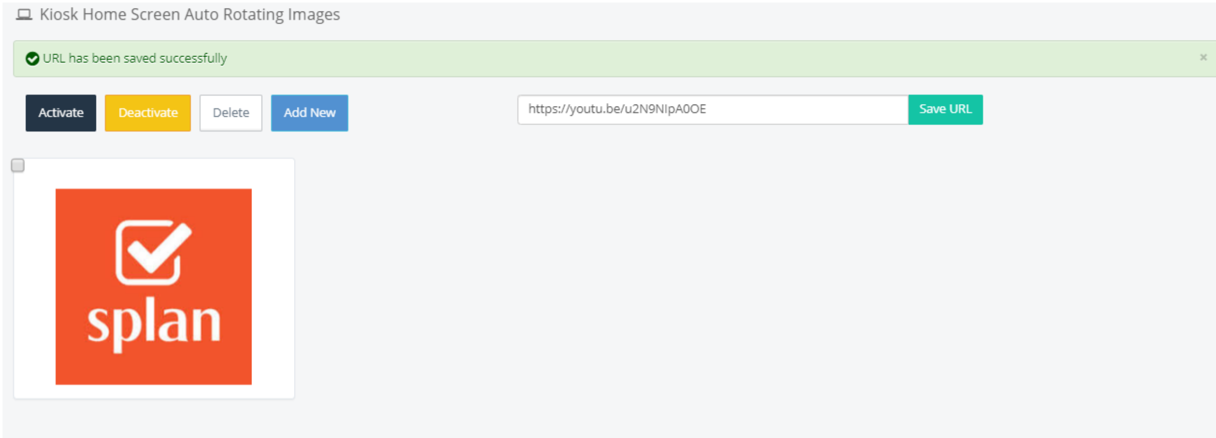
3. Use this checkbox to select the image and perform the following activities:

A) Deactivate: Select the checkbox of the image and click on Deactivate to deactivate the image from displaying on the kiosk

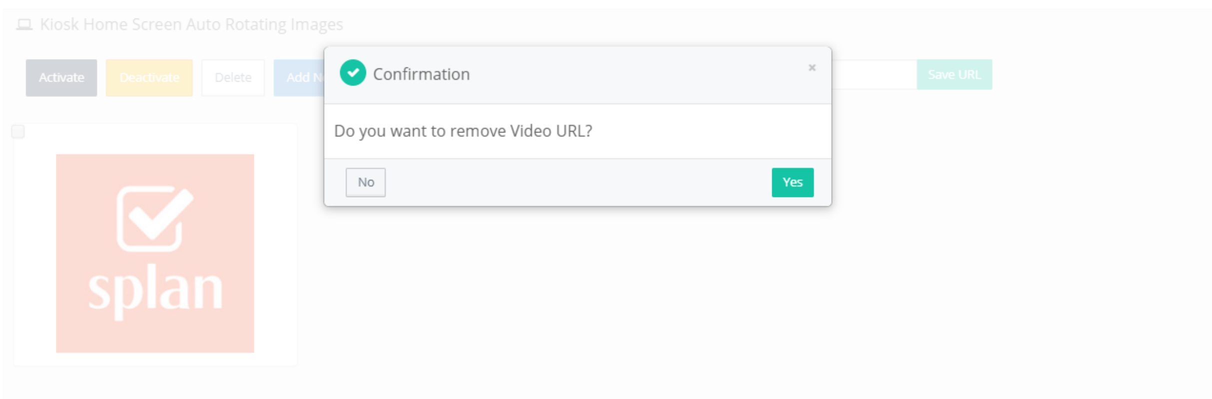
B) Activate: Select a deactivated image/video and click on Activate to activate the image/video again

C) Delete: Select the image/video and click on Delete to remove the image/video completely

4. Add a video URL into the Kiosk video URL box and click on Save URL to add a video from a URL

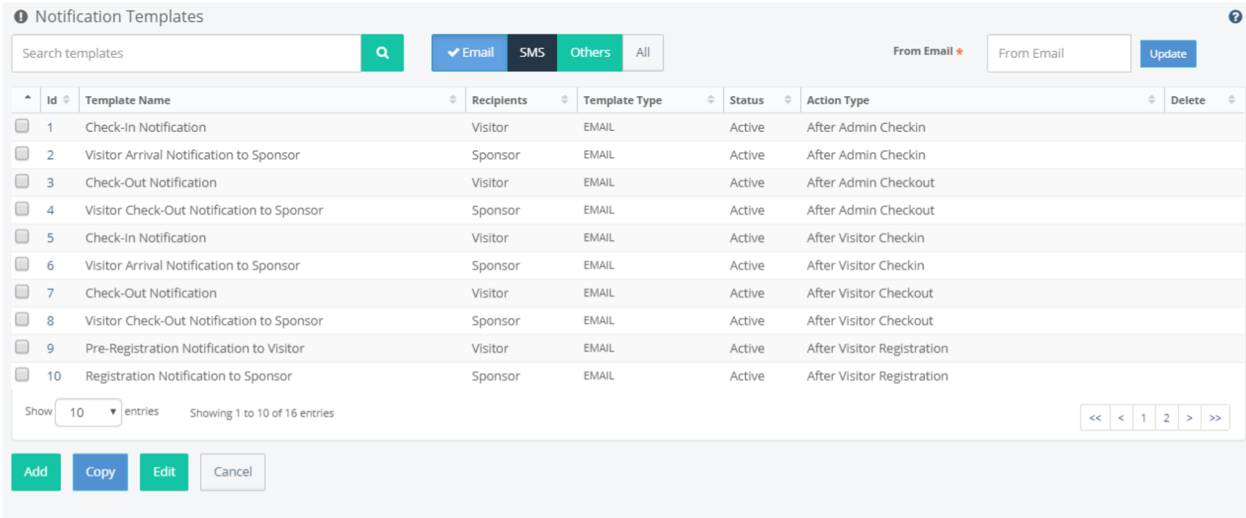


5. To remove a video URL delete the URL from the Kiosk video URL box and click on Save URL again. Select the Yes option on the pop-up



Notifications

Splan visitor management includes a set of default templates that are pre-configured with content and can be used right away once the required services are setup (Email / SMS). These can be accessed by navigating to Setup -> Notifications.



Notification Templates

Search templates | Email | SMS | Others | All | From Email * | From Email | Update

	Id	Template Name	Recipients	Template Type	Status	Action Type	Delete
	1	Check-In Notification	Visitor	EMAIL	Active	After Admin Checkin	
	2	Visitor Arrival Notification to Sponsor	Sponsor	EMAIL	Active	After Admin Checkin	
	3	Check-Out Notification	Visitor	EMAIL	Active	After Admin Checkout	
	4	Visitor Check-Out Notification to Sponsor	Sponsor	EMAIL	Active	After Admin Checkout	
	5	Check-In Notification	Visitor	EMAIL	Active	After Visitor Checkin	
	6	Visitor Arrival Notification to Sponsor	Sponsor	EMAIL	Active	After Visitor Checkin	
	7	Check-Out Notification	Visitor	EMAIL	Active	After Visitor Checkout	
	8	Visitor Check-Out Notification to Sponsor	Sponsor	EMAIL	Active	After Visitor Checkout	
	9	Pre-Registration Notification to Visitor	Visitor	EMAIL	Active	After Visitor Registration	
	10	Registration Notification to Sponsor	Sponsor	EMAIL	Active	After Visitor Registration	

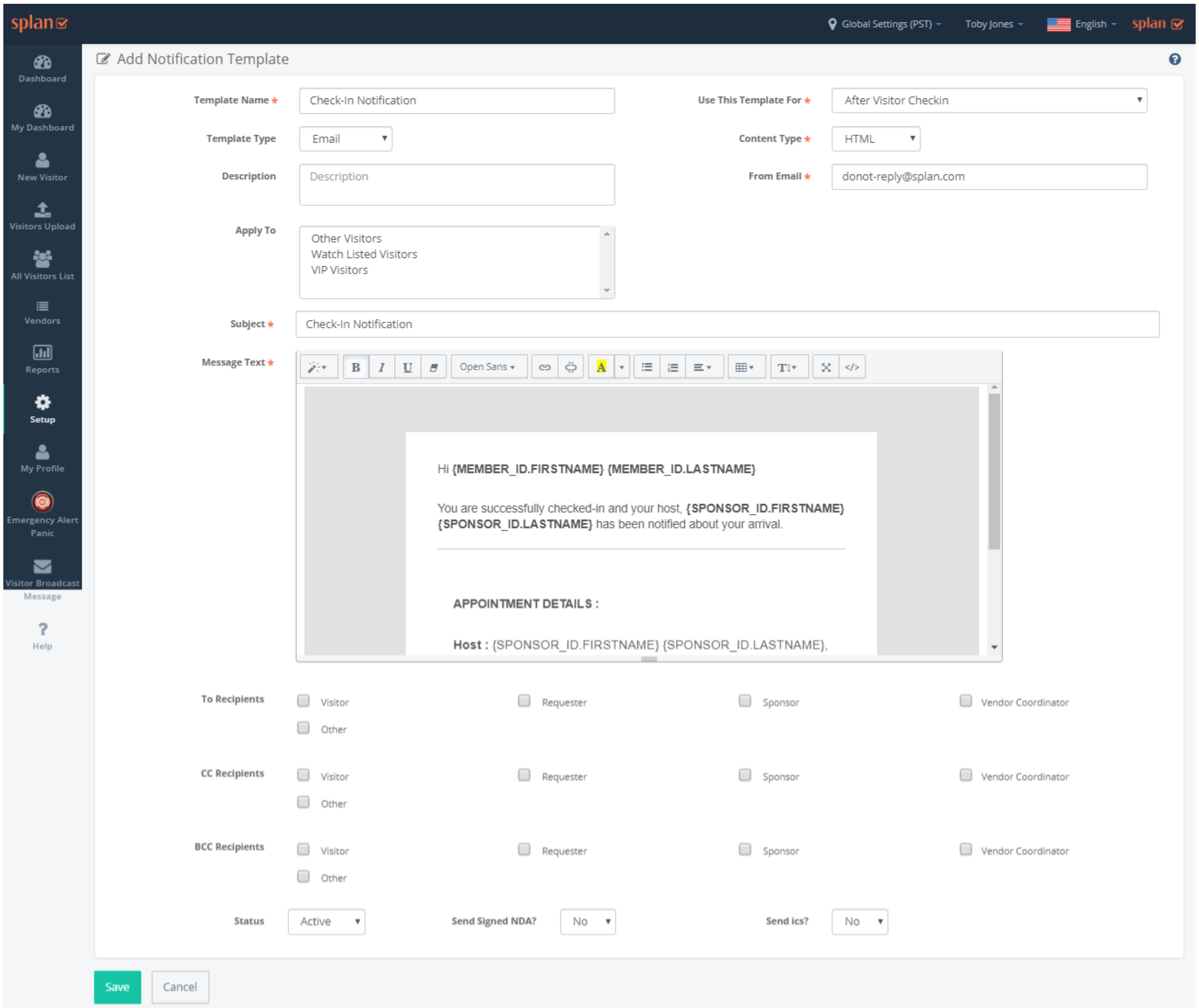
Show 10 entries Showing 1 to 10 of 16 entries << < 1 2 > >>

Add Copy Edit Cancel

Notification templates can be customized. The admin can Add / Copy / Edit templates as desired.

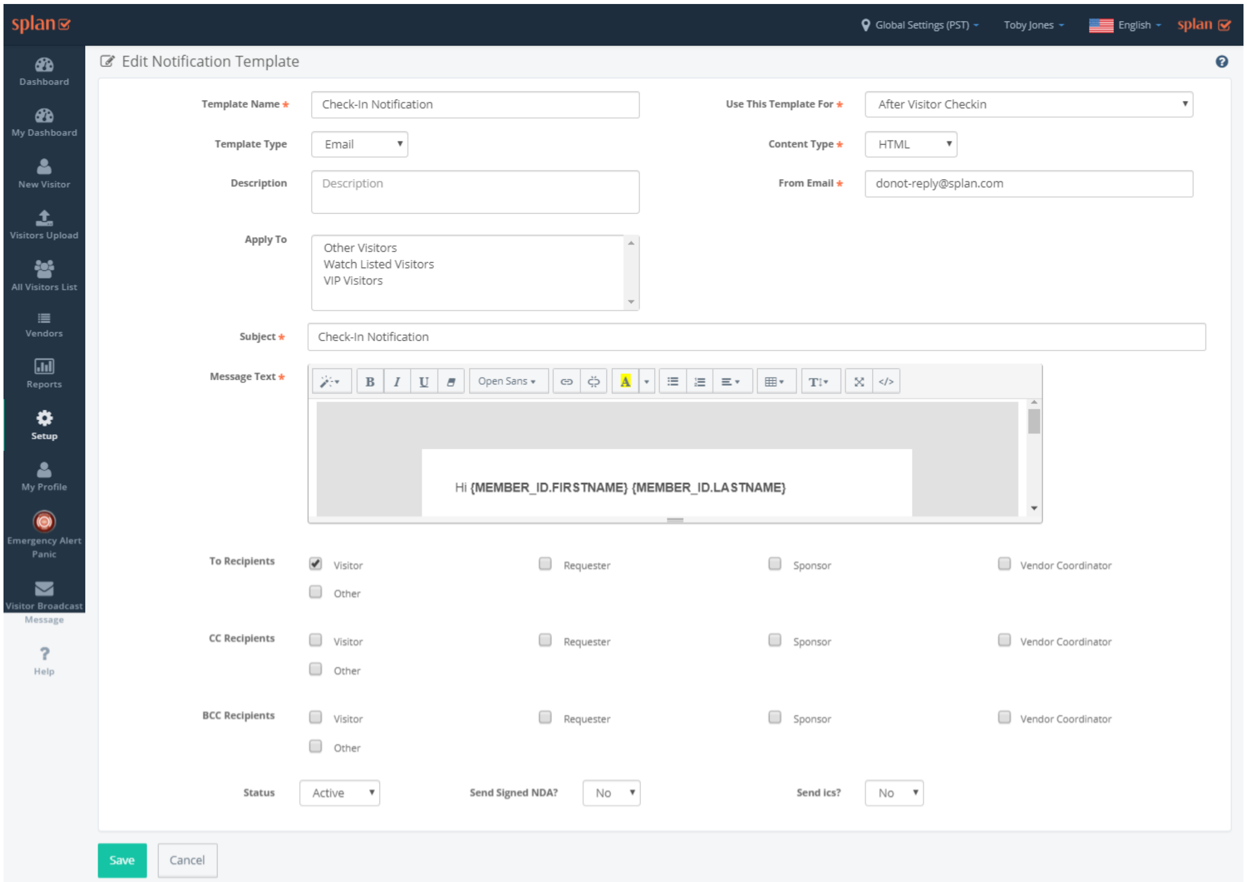
1. Click on Add to navigate to the Add Notification Template page. Select the Action type from the ‘Use This Template For’ field. Splan provides default content which can again be edited or

modified to be customized as per business needs.



2. Select a template from the list and click on Copy to open a copy of the selected template with all the values pre-populated. This can be edited as desired and saved to be used for the selected action type

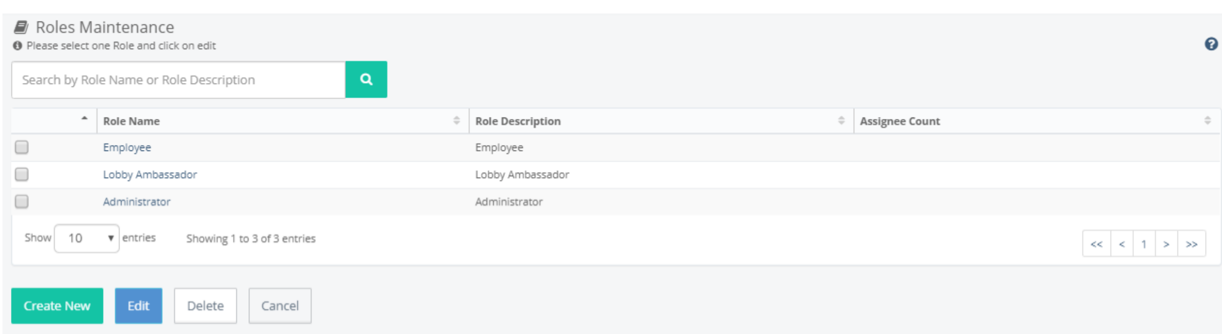
3. In order to edit a template, select the checkbox next to it and click on the Edit button. The admin can also click on the Template Name to edit the template.



Roles

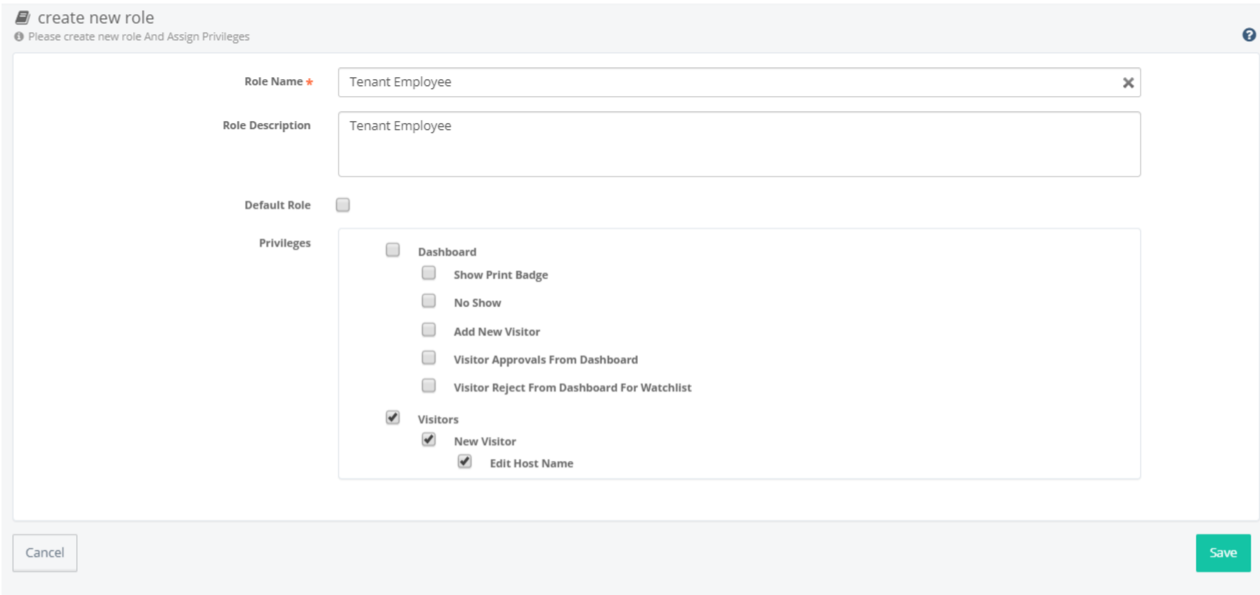
Employees can be assigned roles in the visitor management application. These roles are a collection of privileges that provide the employee with the access to view and perform selected functionalities and workflows in the application. Some basic roles are that of the Employee, Lobby Ambassador/Security Manager/Receptionist and Administrator.

To access the Roles component, navigate to Setup -> Roles



The admin has the options to Create New / Edit / Delete a role.

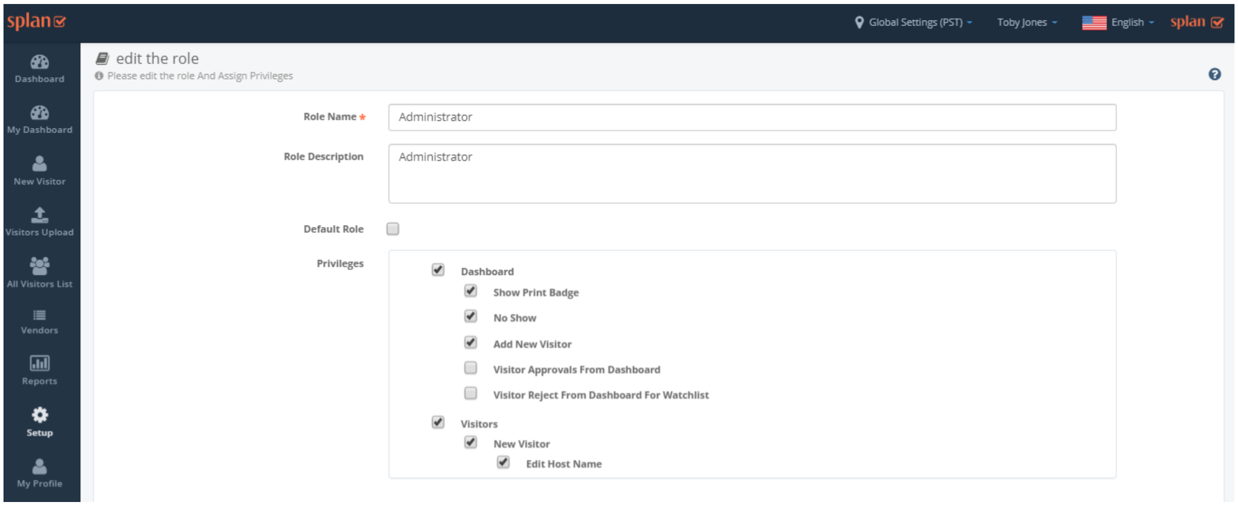
1. Create New: In order to create a new role click on the Create New button. Enter the Role Name, Role Description fields. Select all the privileges required for that role from the Privileges section and click on Save to create the role.



2. A role can be selected as a default role by selecting the Default Role checkbox. In such a case, any employee who is not assigned a role can still login to the application and access the functionalities and workflows enabled for the default role. The form contains "Default role" and "Privileges".

3. Privileges: When a privilege or a block of privileges is selected for a role, only those functionalities and workflows are enabled for the employee assigned to said role.

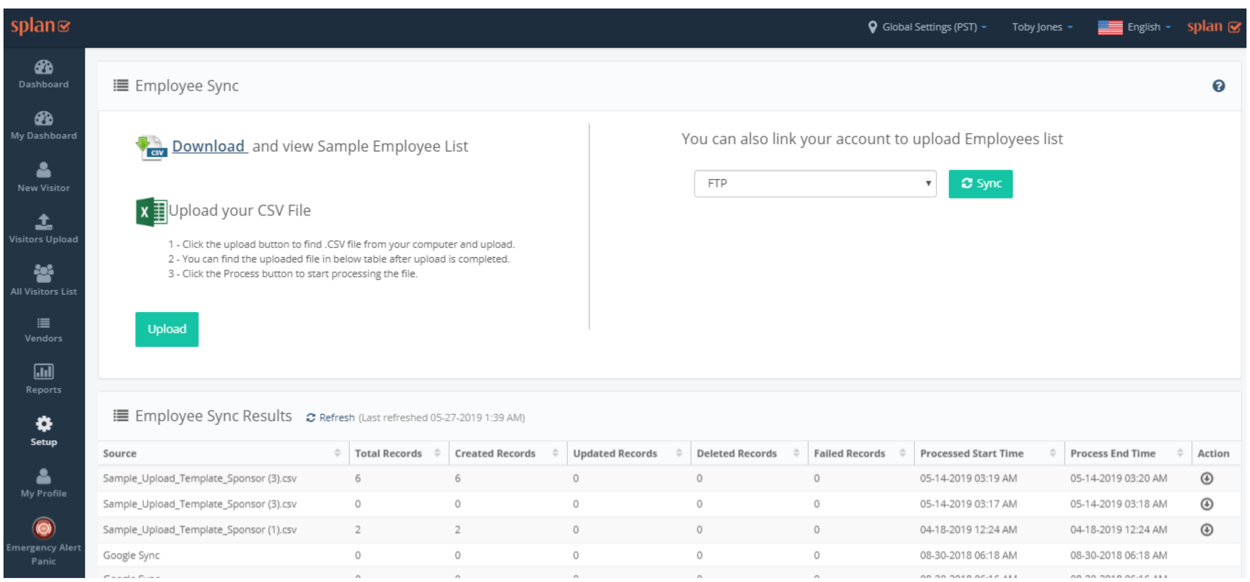
4. In order to edit a role, select the role and click on Edit. The admin can also click on the Role Name to access the Edit The Role page. Make the necessary changes here and click on Save. The role is updated successfully.



5. In order to delete a role, select the checkbox for the role and click on Delete.

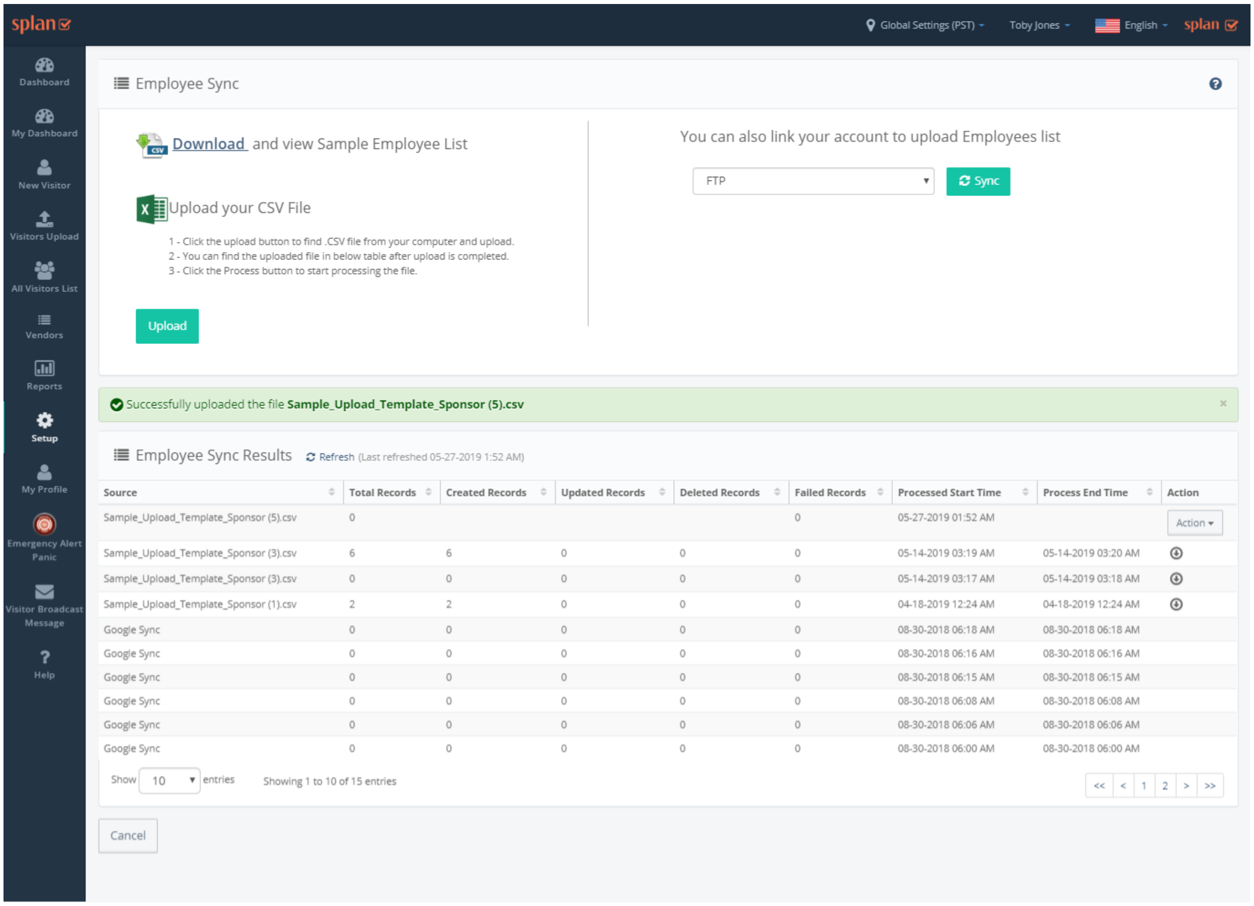
Employee Sync

This module allows the admin to upload employee details in bulk. As a pre-requisite, the CSV connector must be configured for the provider. Other methods of syncing employees are also available as can be seen on the top right hand side of the screen below:

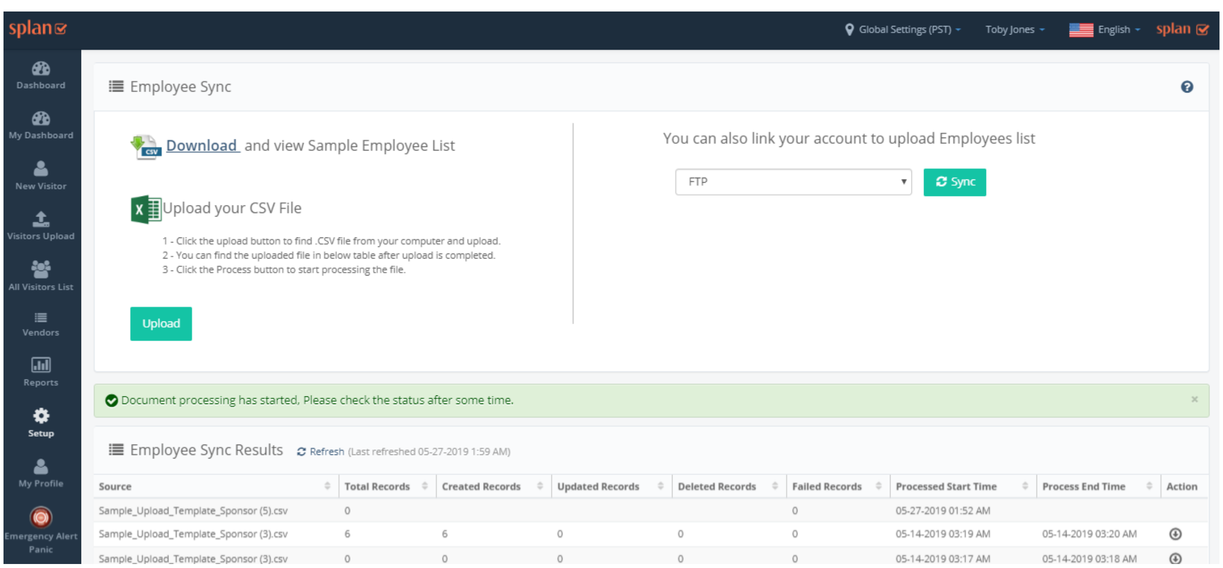


1. For the CSV file upload, click on the Download link for the sample file.
2. Enter all the required details under the relevant headers
3. Click on the Upload button and select the updated CSV file that holds the employee details to be uploaded

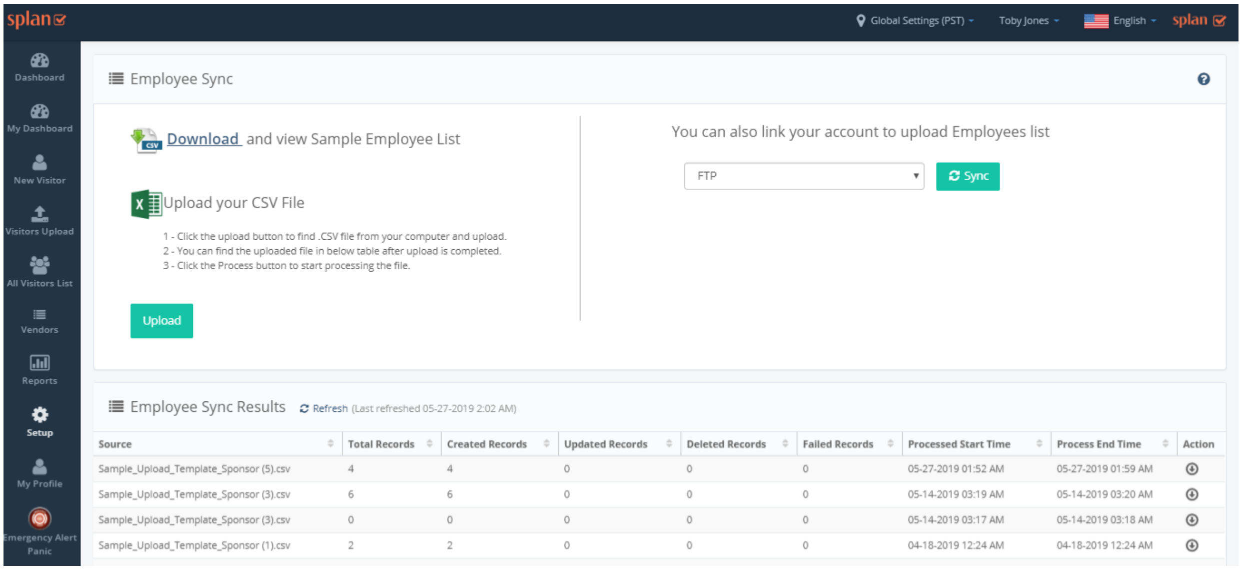
4. The file is uploaded successfully. A record is created for the uploaded file along with an Action button dropdown. A success message is displayed as follows:



5. Click on the Action button dropdown and select the Process option. The processing begins and clicking on the refresh button displays the processing status.



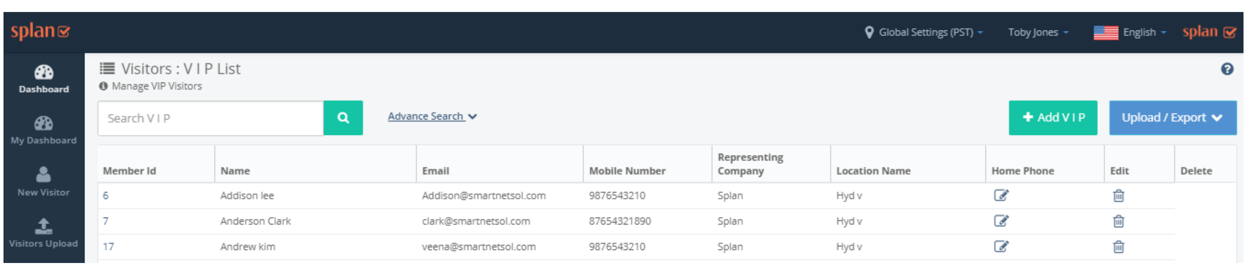
6. Once processing is completed, the record is updated with the total number of records processed and the number of employee profiles that were created, updated, deleted or failed as part of this sync process



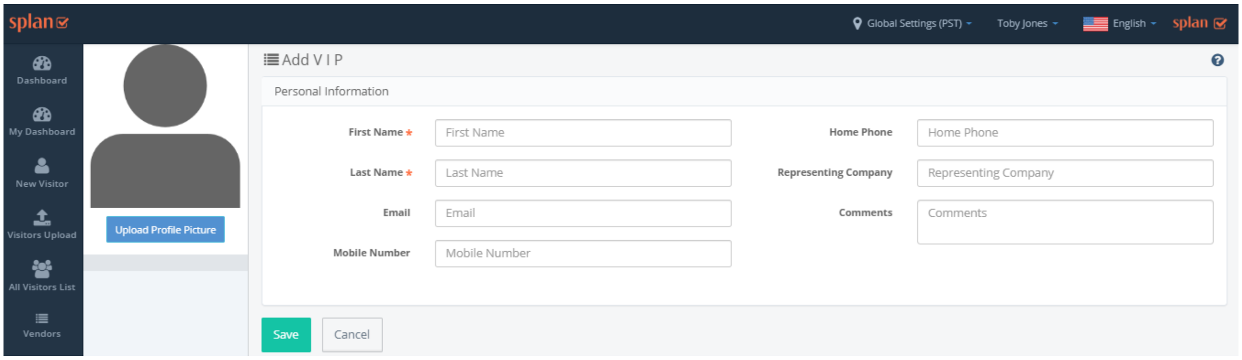
VIP List

The VIP List component allows for pro-active management of VIP visitors who are visiting the premises. The component can be access by navigating to Setup -> VIP List.

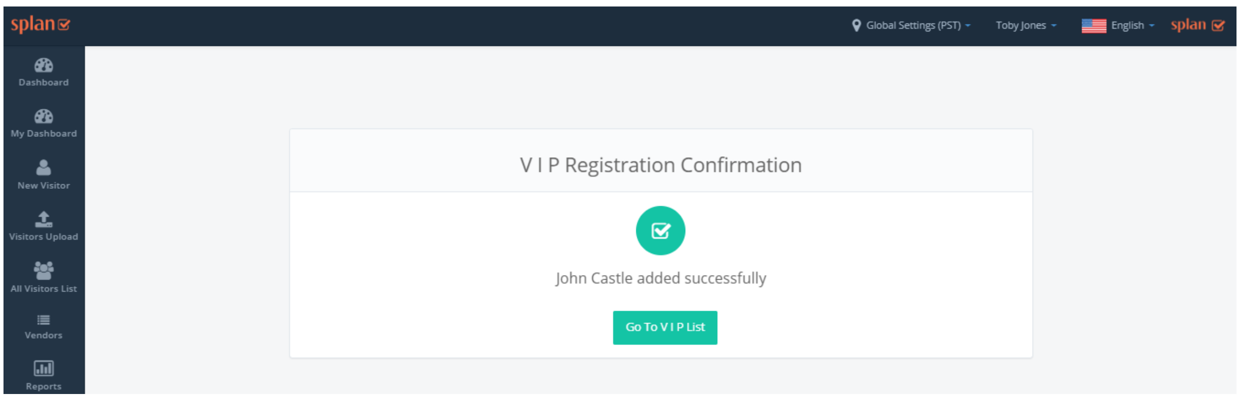
1. Click on VIP List from the Setup component



2. Click on + Add VIP button to enter VIP profile details. Enter all the details and click on Save.

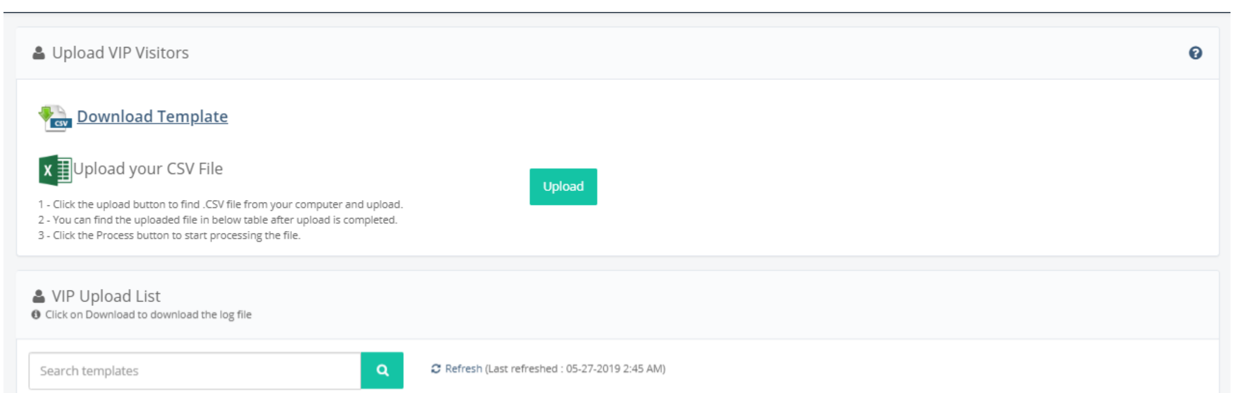


3. VIP registration confirmation message is displayed



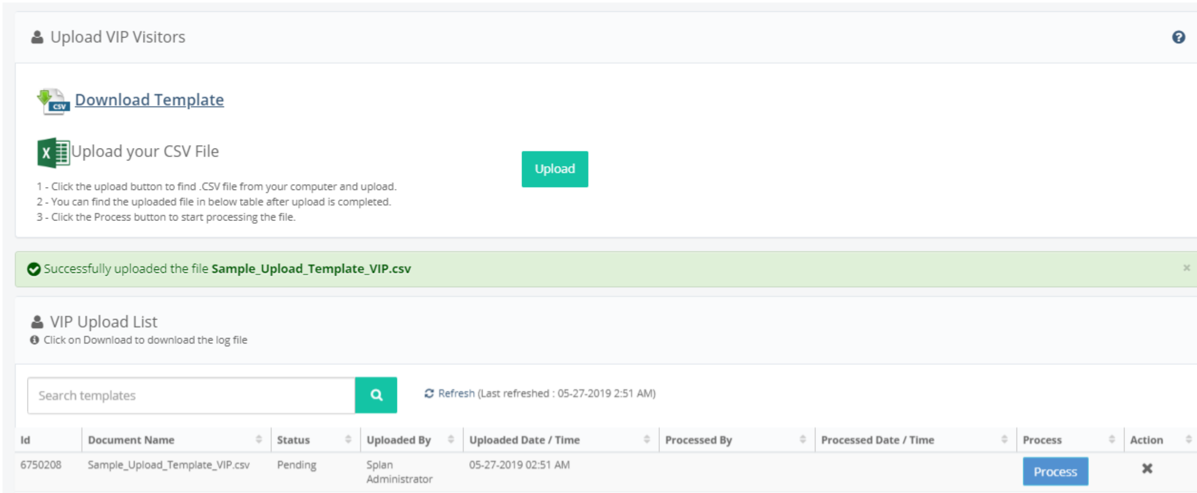
3. The 'Go to VIP List' button redirects the admin to the VIP List page that shows all VIP profile records

4. Multiple VIP profile details can be added by uploading a file that has the required details. To achieve this, click on Upload/Export option and then click on Upload



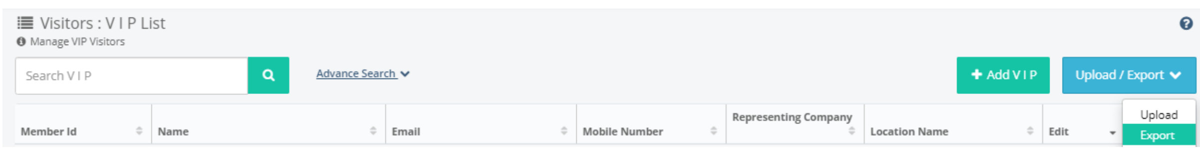
5. Click on the Download link for the sample file and enter all the VIP profile details that need to be uploaded

6. Enter all the details in the file and save. Click on the Upload button and select the file that is to be uploaded. The uploaded record gets added to the grid along with a Process button



7. Click on the Process button to initiate file processing. Clicking on the Refresh button updates processing status along with the number of successful and failed records.

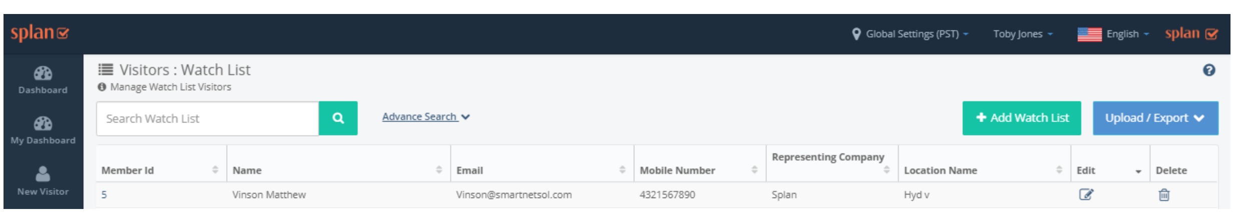
8. Selecting the Export button in the VIP List page results in a downloaded file that contains all VIP profile records



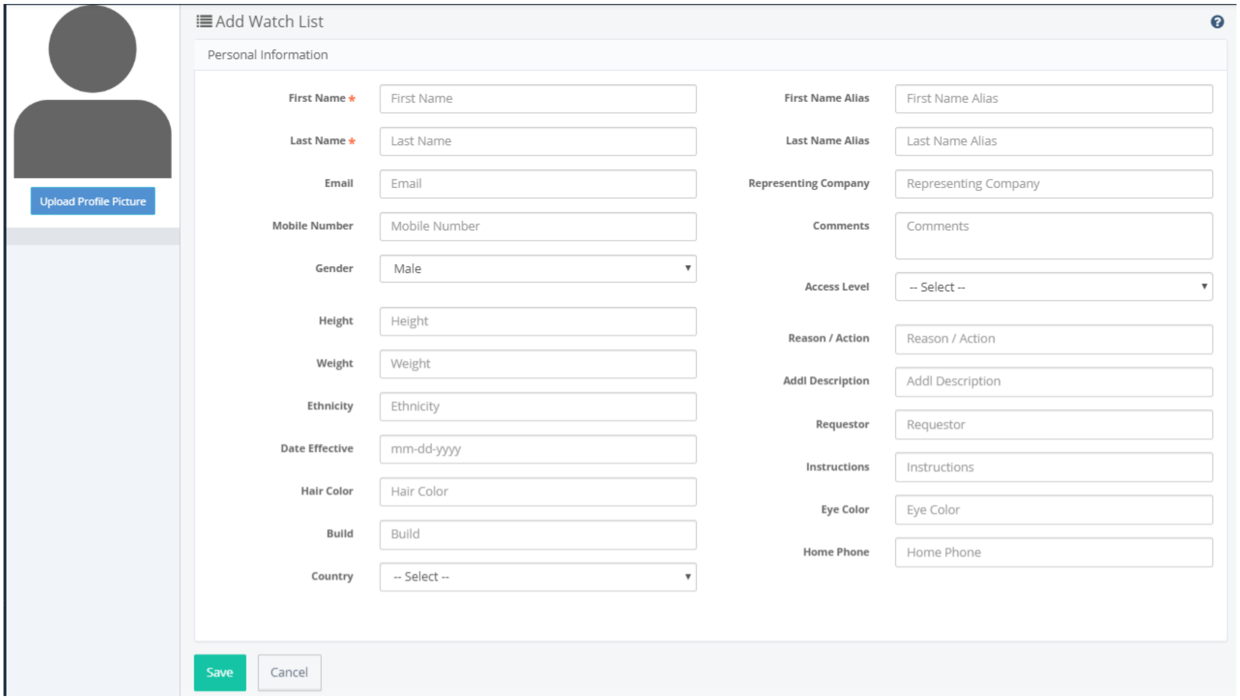
Watch List

The watchlist module enables the admin to maintain a database of watchlist profiles. The component provides the ability for a background check of sorts to be run whenever a visitor is pre-registered, checks in or walks in to meet their host.

1. Click on Watch List from the setup component to go to the Watch List page

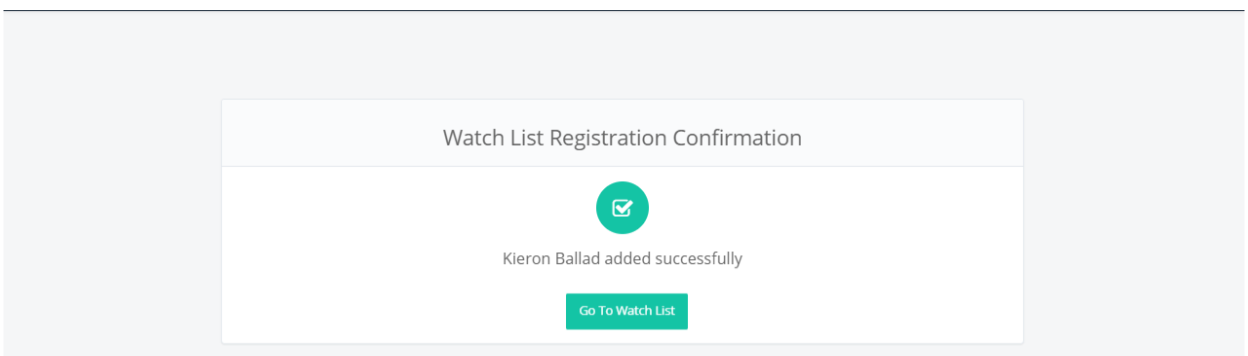


2. Clicking on the +Add Watch List button redirects the admin to the watchlist form that can be used to add a potential watch list profile to the database

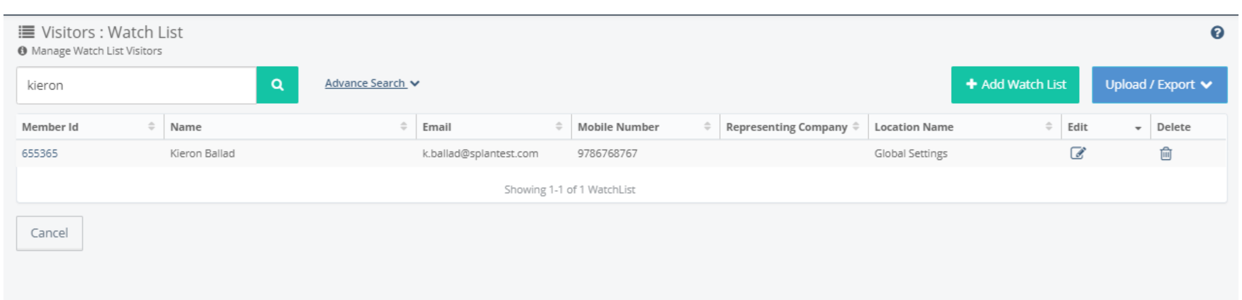


4. Enter all the details and click on Save

5. 'Watch List Registration Confirmation' message is displayed. Clicking on 'Go to Watch List' button redirects the admin to the Watch List

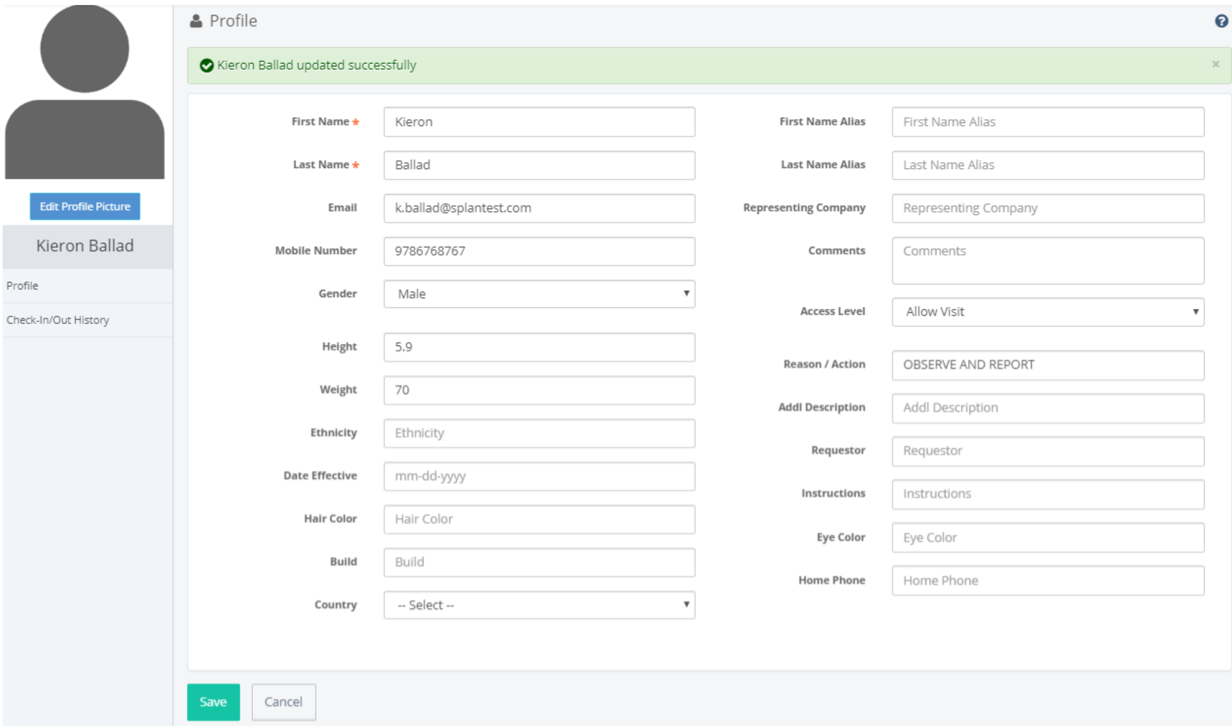


6. Search for the newly created watchlist profile by entering the name in the search box and clicking on the search icon

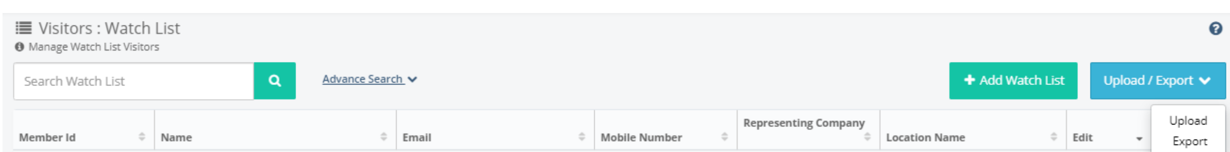


7. Click on the icon under the Edit column to update any value(s) in the any of the fields in the form and then click on Save

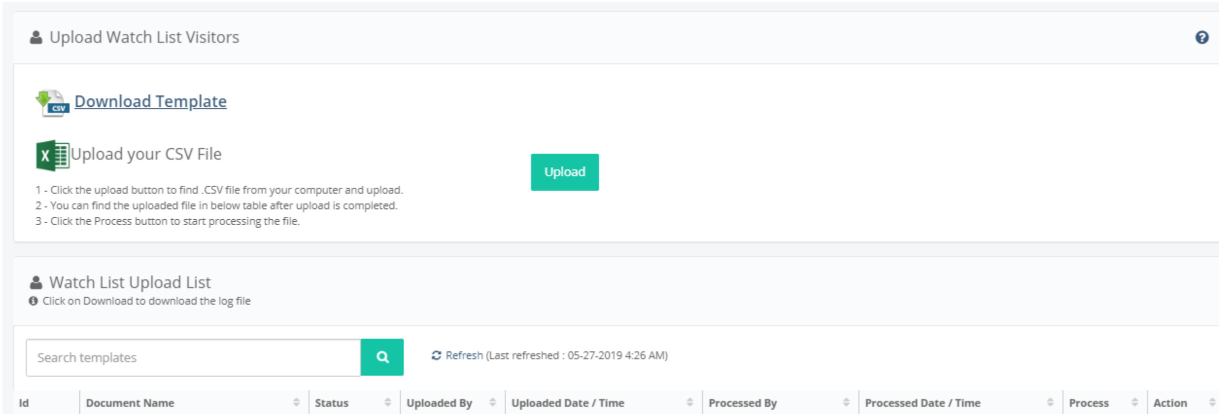
8. A confirmation message is displayed for successful update along with the watchlist profile details



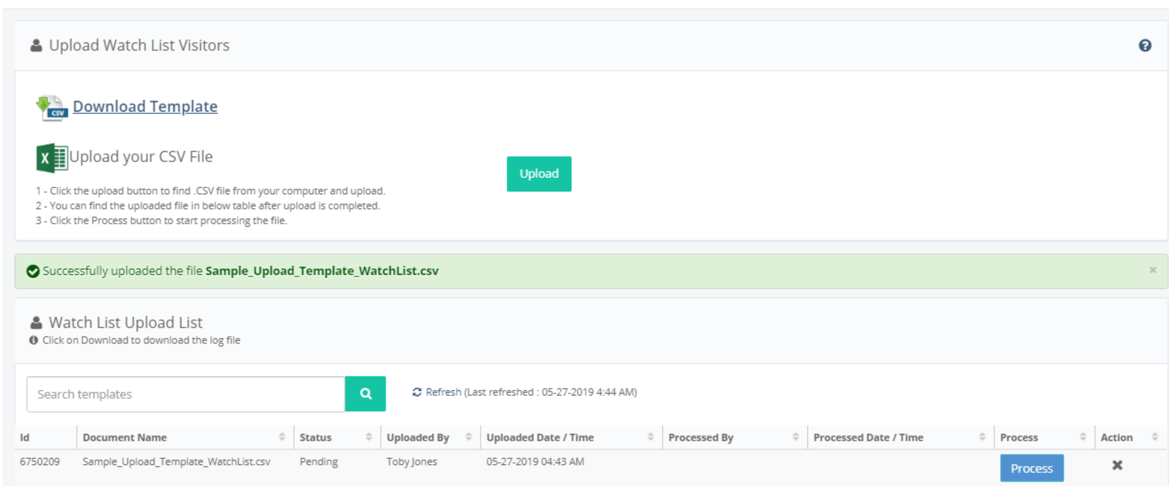
9. In order to upload multiple watchlist profiles at one go, navigate to Setup -> Watch List and then click on the Upload/Export button



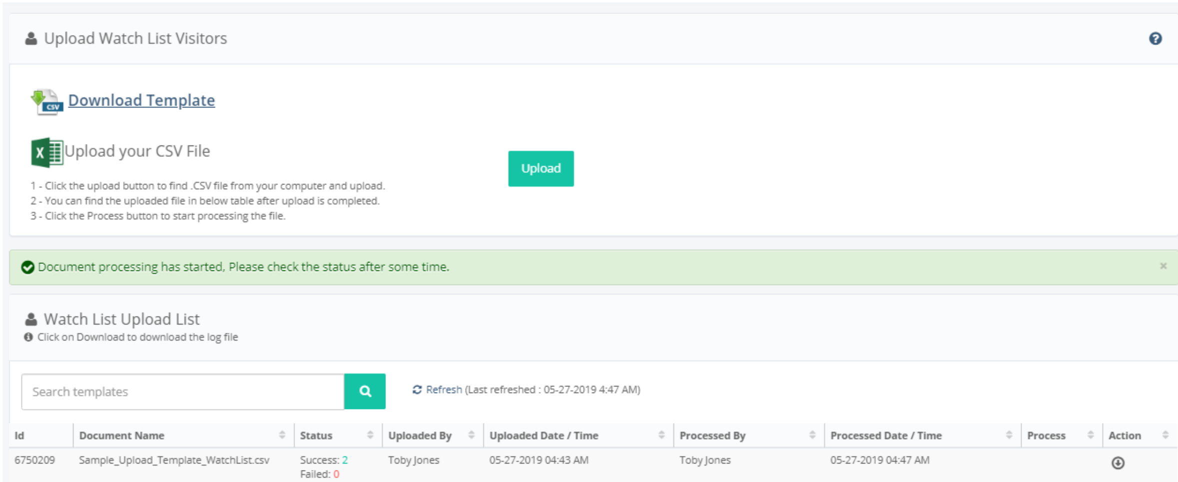
10. In the Upload page, click on the Download link to download the sample file. This file can then be updated with the details of the watchlist profiles to be added.



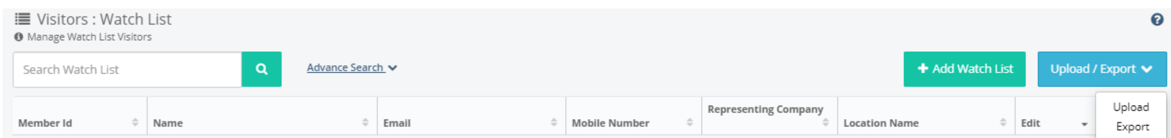
11. Once the sample file is updated with the details, click on the Upload button and select the updated file. The document is uploaded successfully and a record is added to the grid along with a Process button



12. To initiate document processing, click on the Process button. A confirmation message is displayed with the message ‘Document processing has started, Please check the status after some time.’ Clicking on the refresh button updates the status of the uploaded file with the number of successful and failed records.

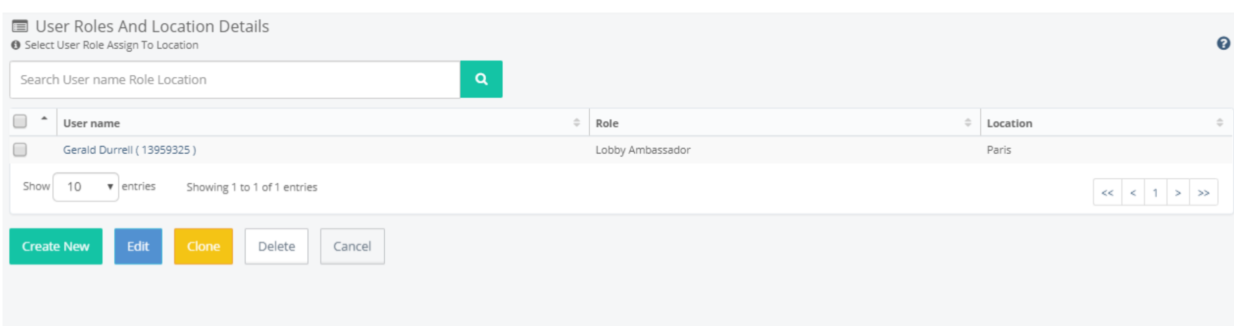


16. To export the list of all watch list profiles in the application, navigate to Setup -> Watch List and click on Upload/Export to choose the Export option. A file with the list of all watch list profiles is downloaded as a result.

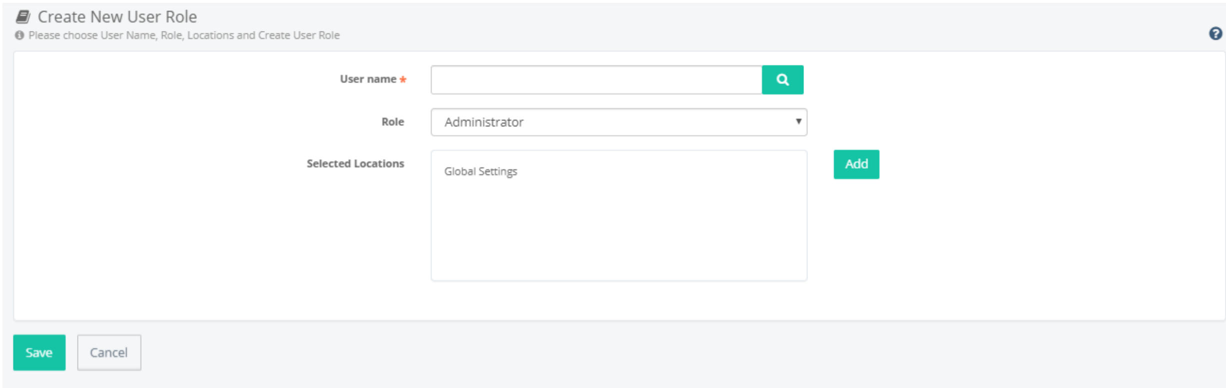


User Roles and Permissions

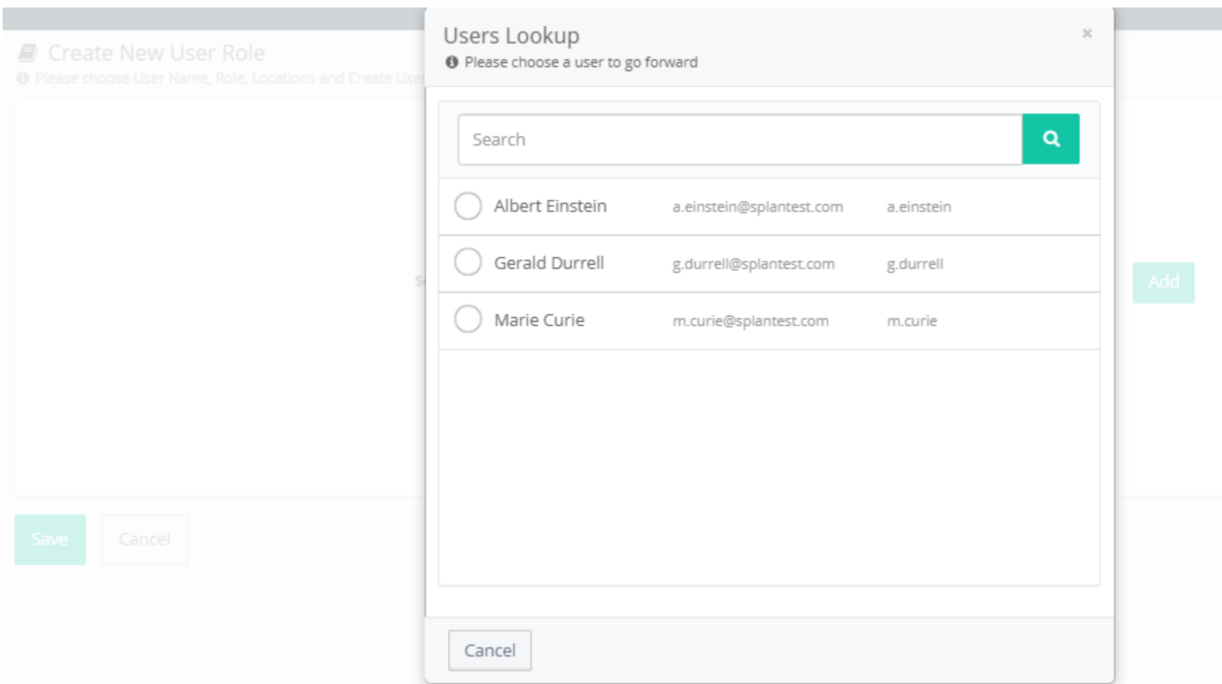
The User Roles and Permissions component can be used to assign roles to employees for different locations. Click on Setup -> User Roles and Permissions to access this component.

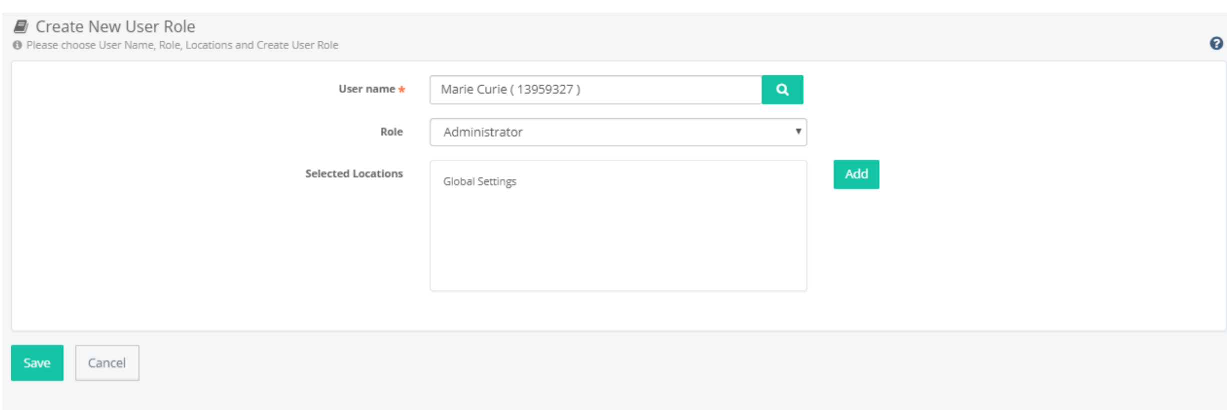


1. In order to create a new user role, click on Create New to view the Create New User Role page

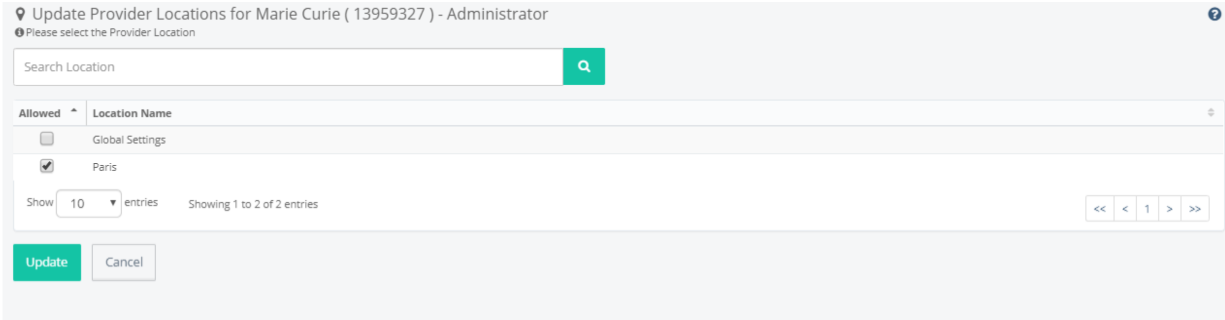


In the Create New User Role page, click on the User Name field to view a User Lookup. This pop-up contains the list of employees. Search for and select an employee from this list.

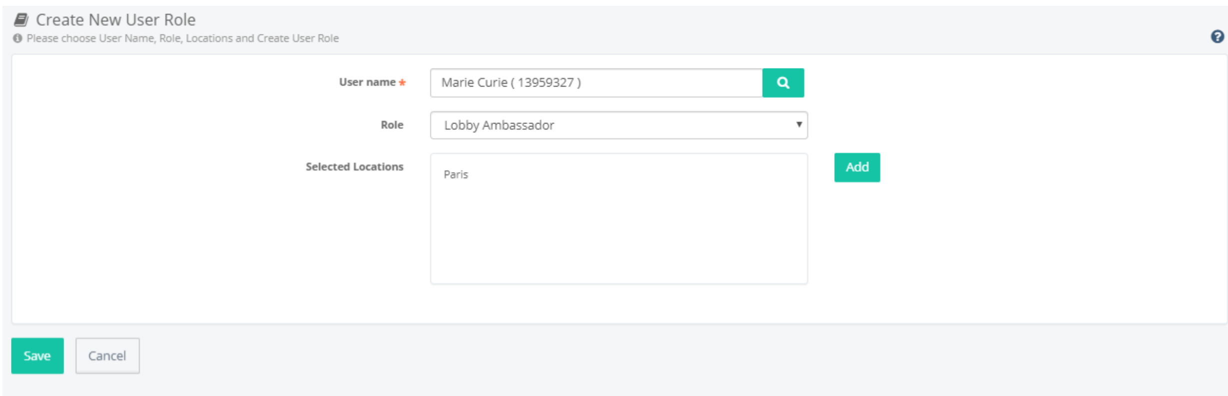




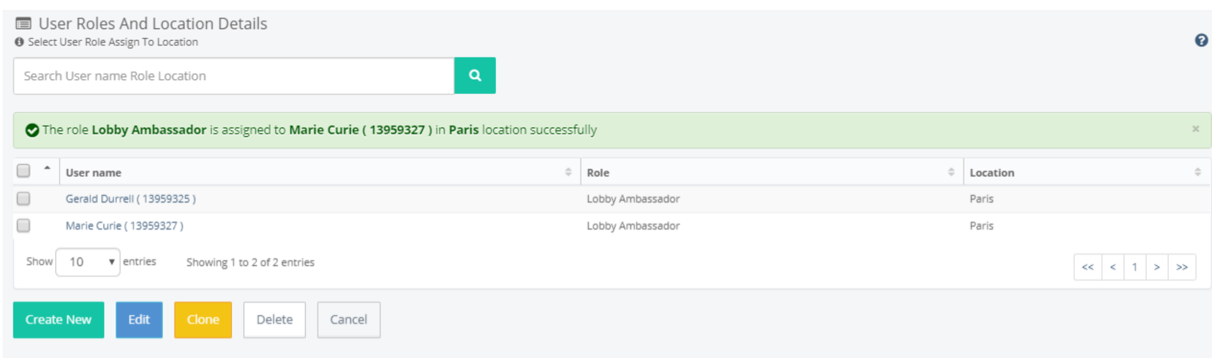
Click on Add to select the required location. Click on Update



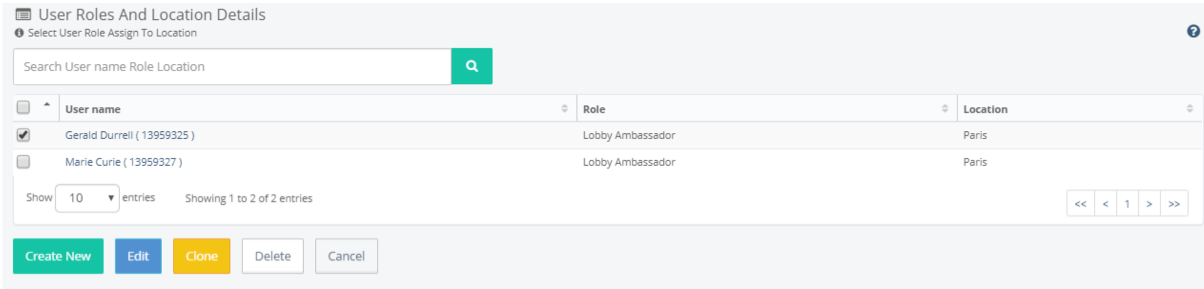
Now select the desired role from the Role dropdown and click on Save.



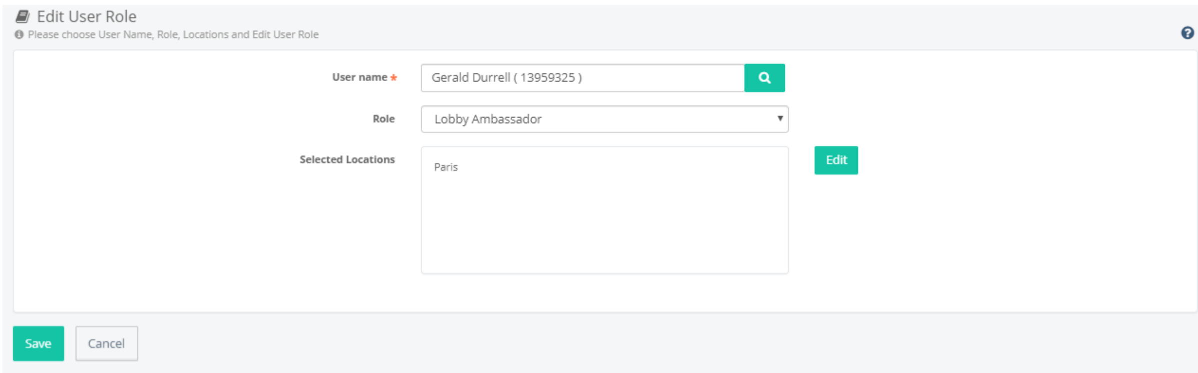
The employee is now assigned with the selected role to the required location



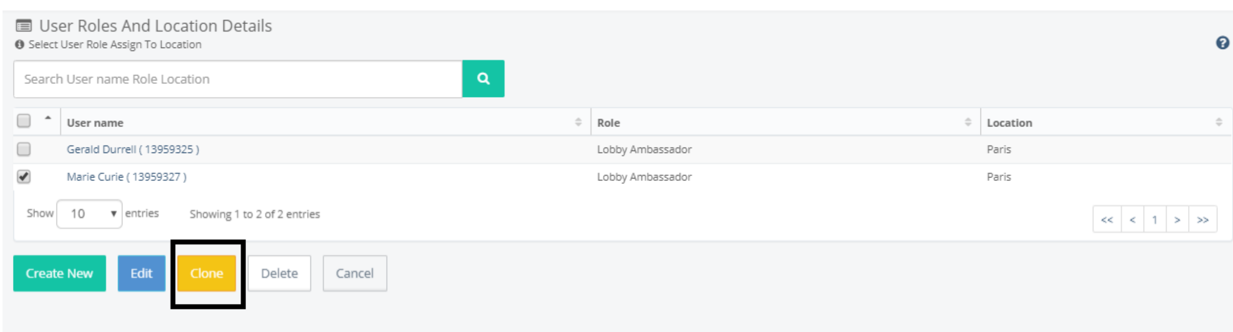
2. Edit a user role by selecting the checkbox next to the user name and clicking on the edit button. The admin can access the Edit User Role page by clicking on the User Name itself.

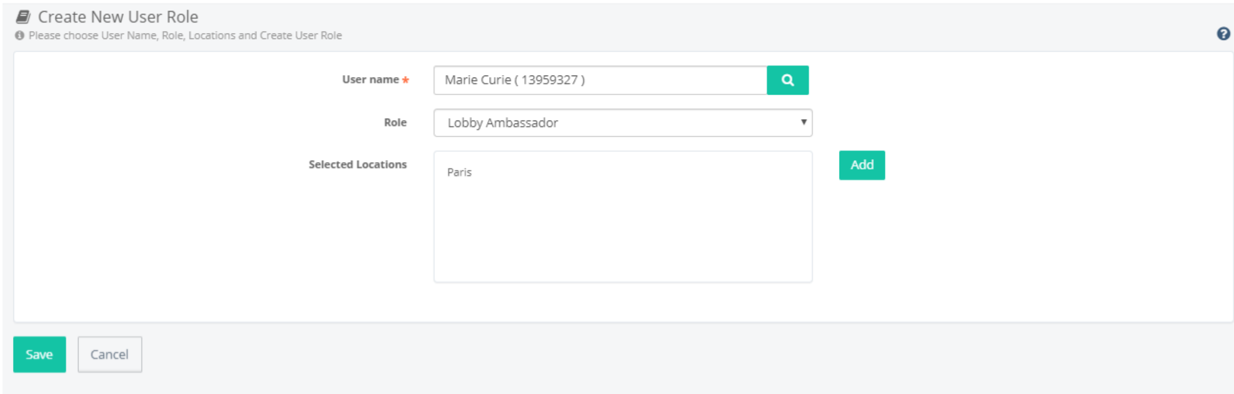


In the Edit User Role page make the necessary changes and click on Save



3. The admin can clone an existing user role to make a copy of the same for another employee or for a different role. Select the checkbox next to the user name and click on the Clone button to view the Create New User Role page with the values pre-populated. These can now be edited as needed. Click on Save to save the changes made.

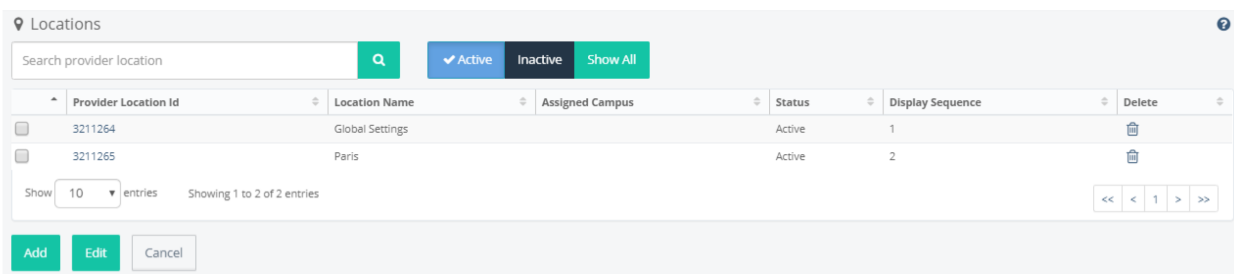




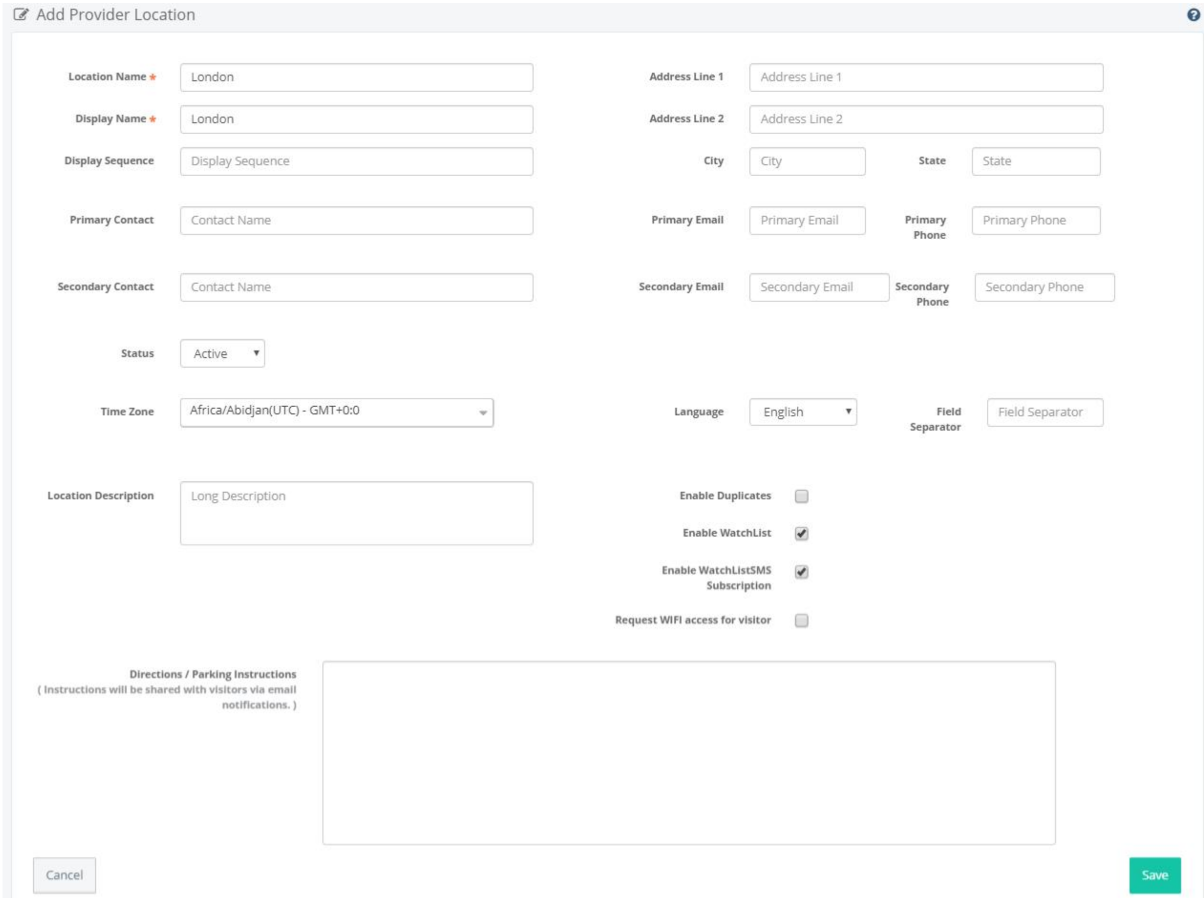
4. Select a checkbox next to a user name and click on Delete. This action deletes the roles assigned to the employee. The employee details are also removed from the list.

Locations

The admin can view / add / edit the locations configured for a provider by navigating to Setup -> Locations.

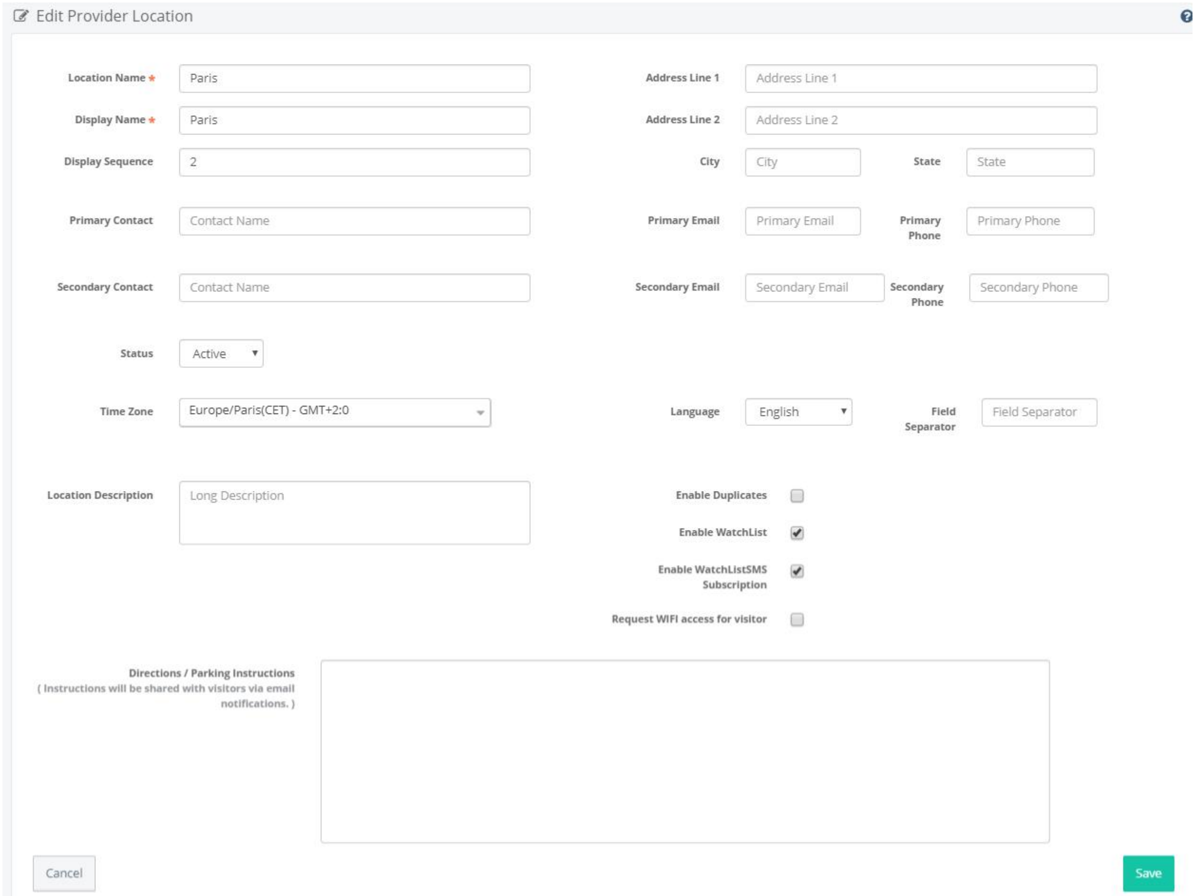


1. In order to add a location click on the Add button. In the Add Provider Location page enter all the required details.



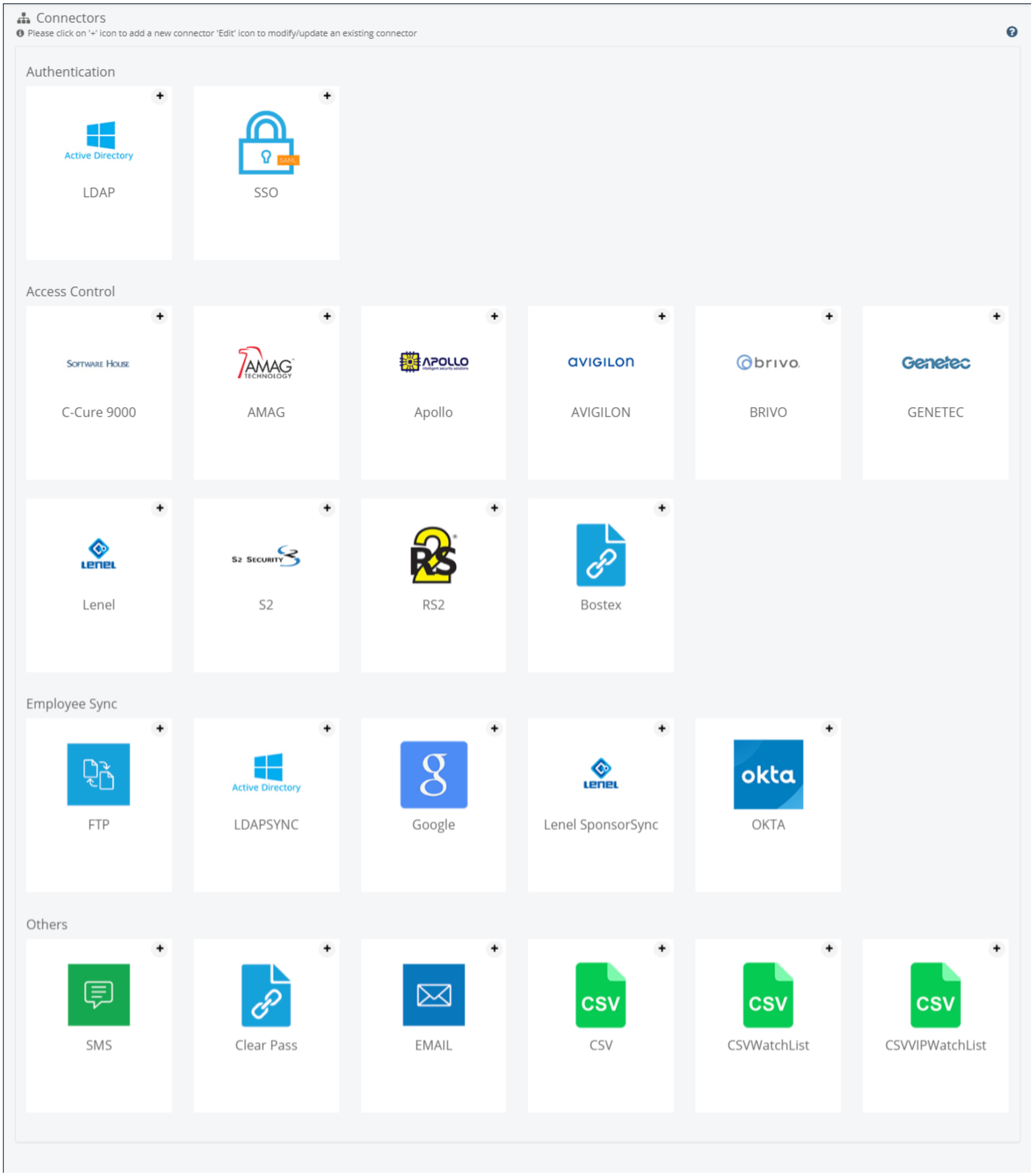
A display sequence gets assigned to the location based on which it is displayed in the list. The admin can also enter this sequence to control the display sequence in the list. A timezone can also be assigned to the location in the Timezone field. Additional details that can be added include the default language to be displayed (Language dropdown) and Parking instructions.

2. To edit a location, select the checkbox next to the Provider Location Id and click on the Edit button. The admin can also access the Edit Provider Location role by clicking on the Provider Location Id



Connectors

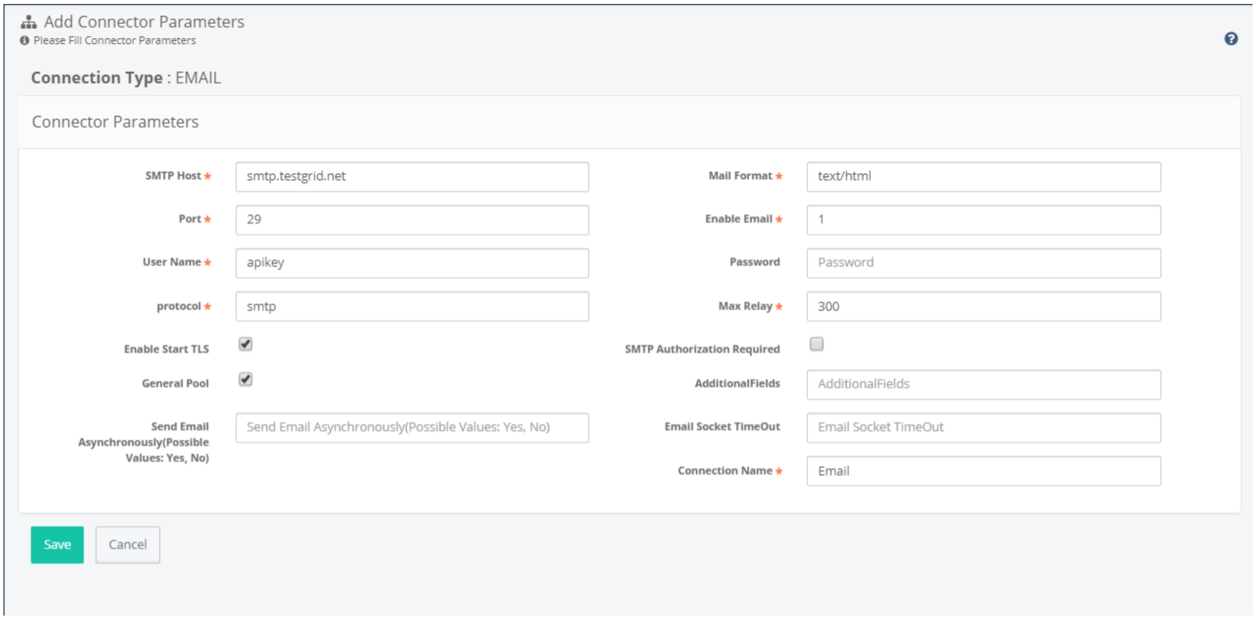
Connectors are used to interface and integrate with third party services such as email, SMS, Active Directory, Access Control Systems, etc. An admin can setup connectors on demand using the Connectors module. To access this module, navigate to Setup -> Connectors



1. To setup a connector, click on '+' icon against the connector.

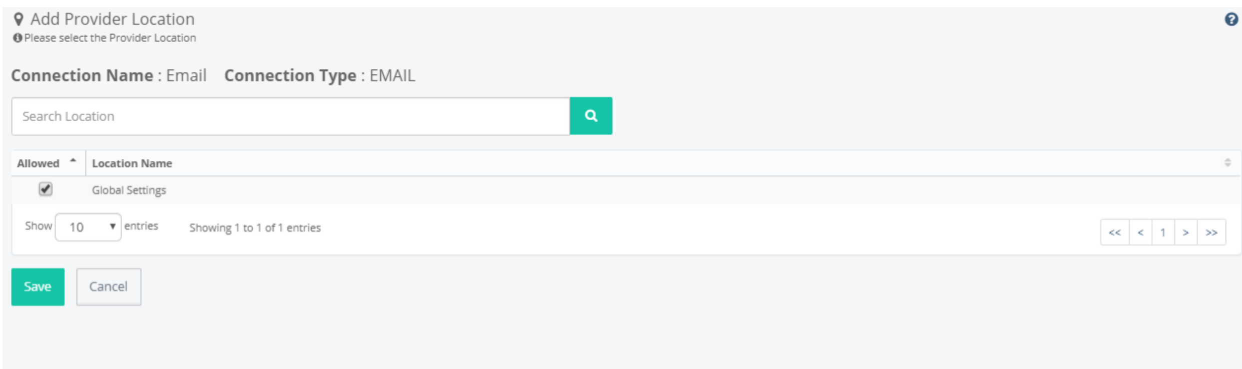
For example, to setup Email connector, click on '+' against EMAIL connector.

Enter all the required connector details and click on Save

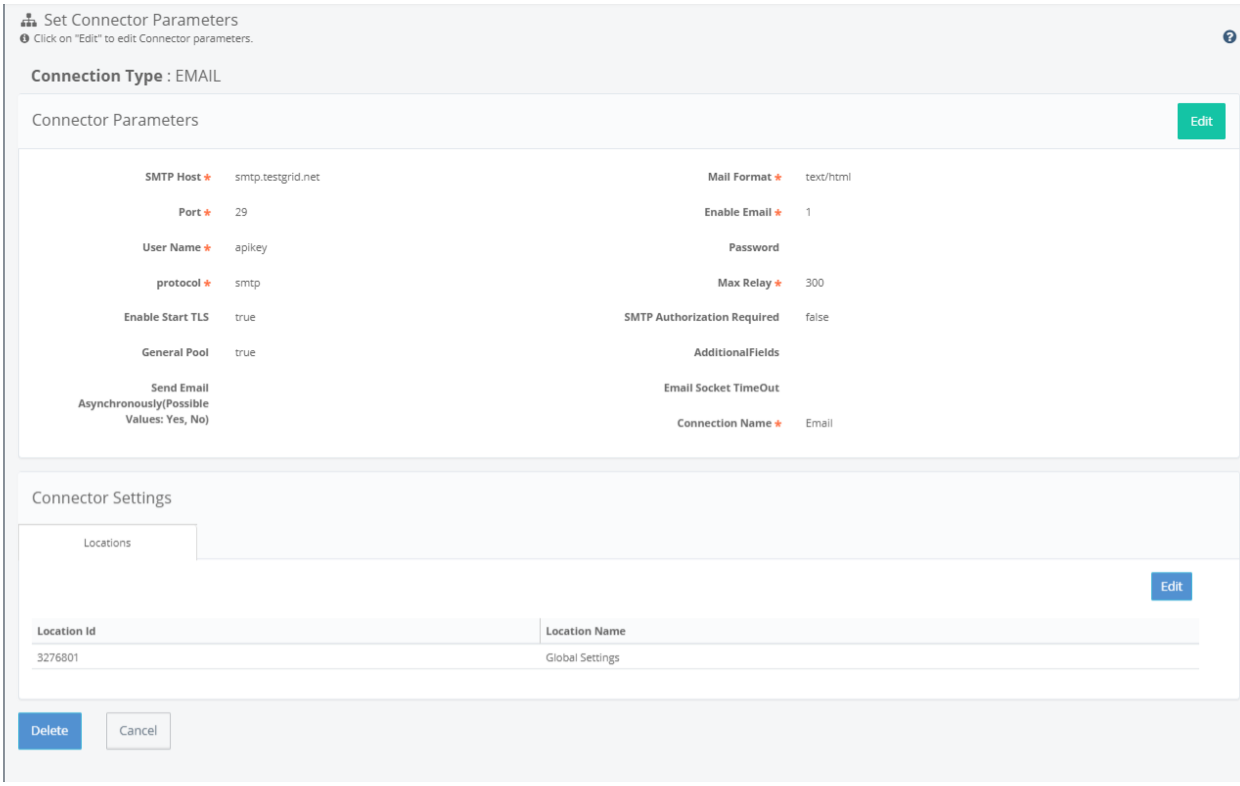


In the ‘Add Provider Location’ choose the locations where this connector will be applicable for.

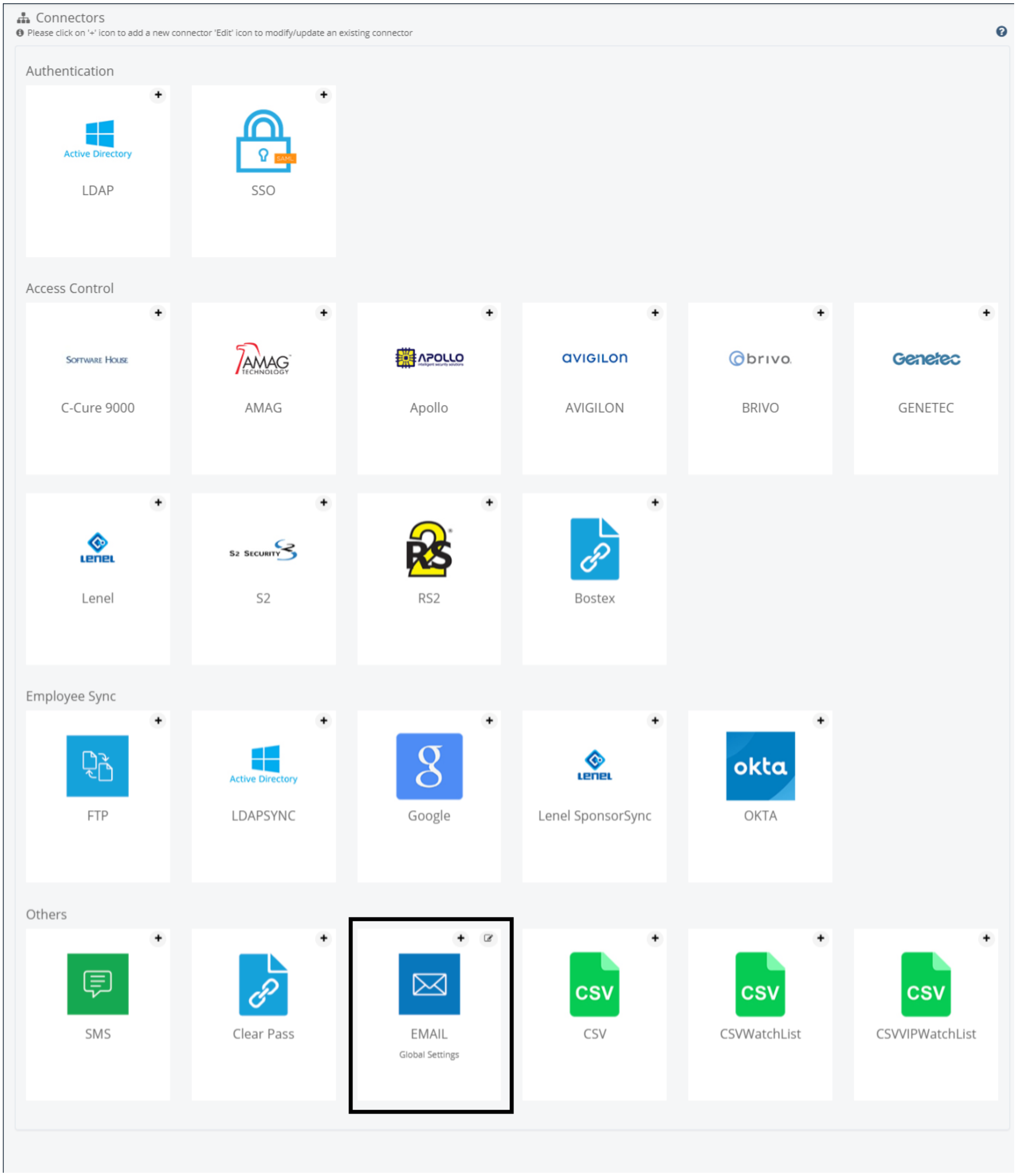
Upon choosing ‘Global Settings’ the connector will be applicable for all the locations.



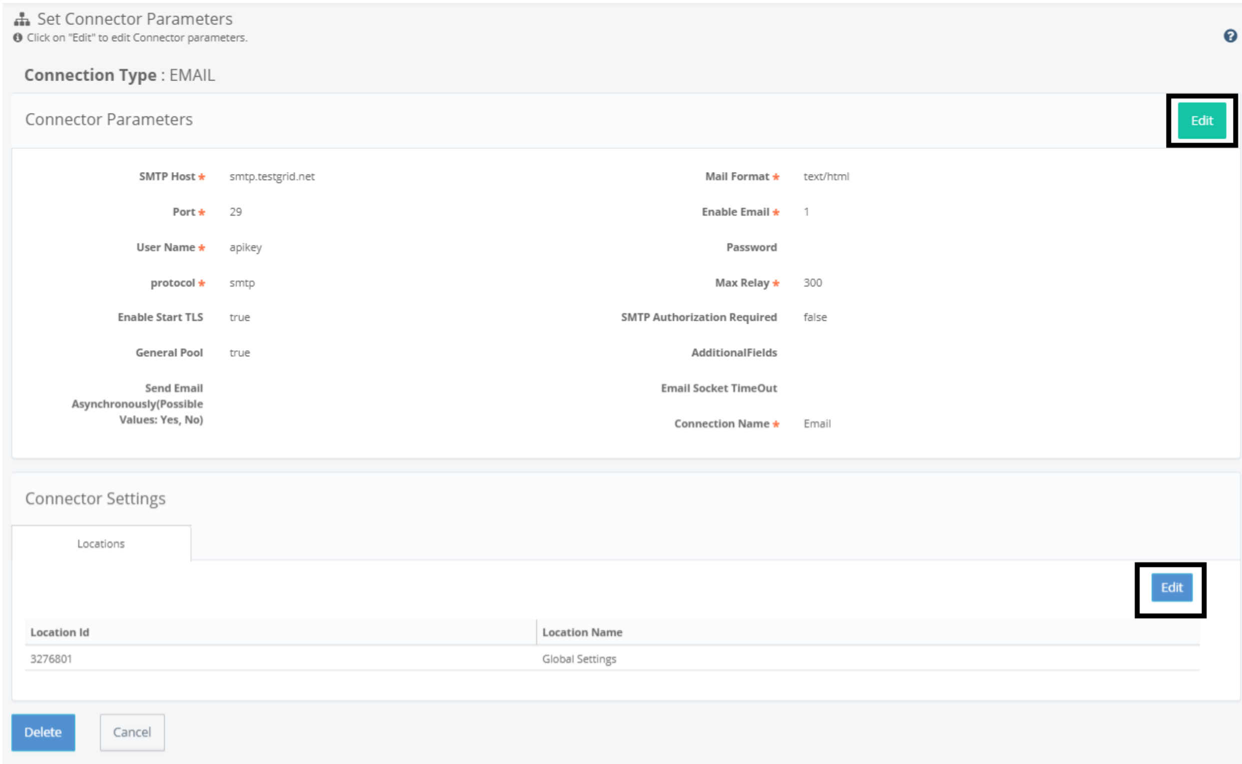
Once the locations are chosen and clicking on Save button, connector is created successfully



2. To edit the connector, navigate to Setup -> Connectors. Click on the Edit icon on the top right corner of the connector

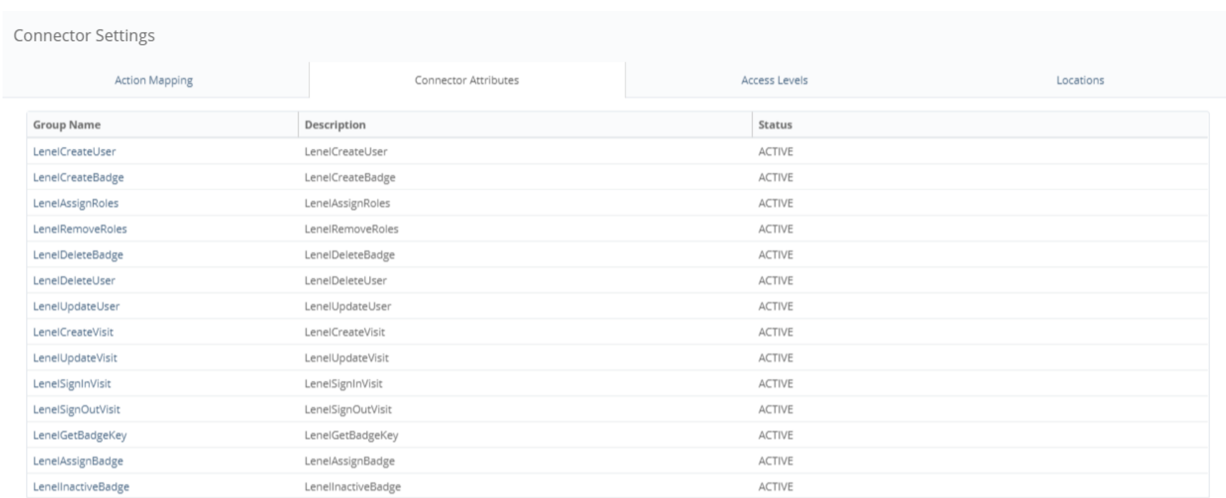


Clicking on this icon redirects the admin to the 'Set Connector Parameters' page. Click on the Edit buttons to update connector parameters or connector settings

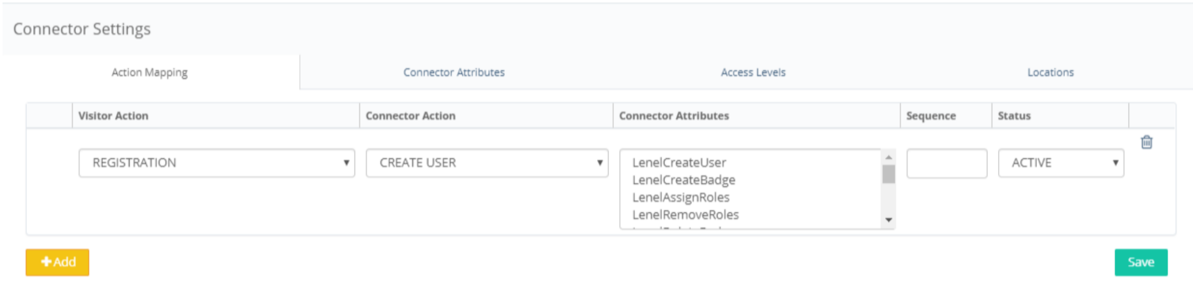


3. Click on the Delete button to delete the connector

4. Connectors for access control systems come with connector attributes included in the framework. For example, the Lenel connector below is already programmed with the connector attributes. The admin need only provide the action mapping and access levels once the connector parameters and locations have been configured.

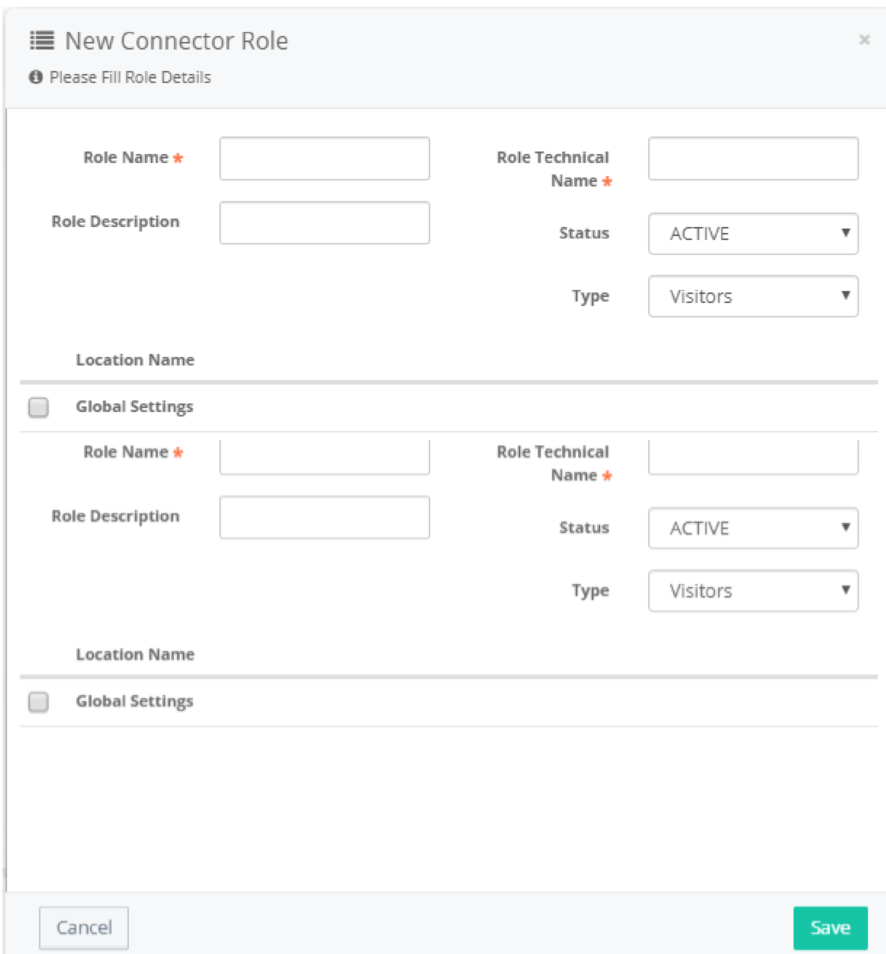


4. To add Action Mapping, click on Action Mapping tab, click on +Add button



5. The admin can select the visitor action and map the same to the connector action and connector attributes. The provisioning sequence can also be selected from the Sequence column. The status of a visitor action can be made active / inactive based on the desired configuration. Once the mapping is complete, click on Save

6. To add access levels, click on the Access Levels tab, click on the +Add button

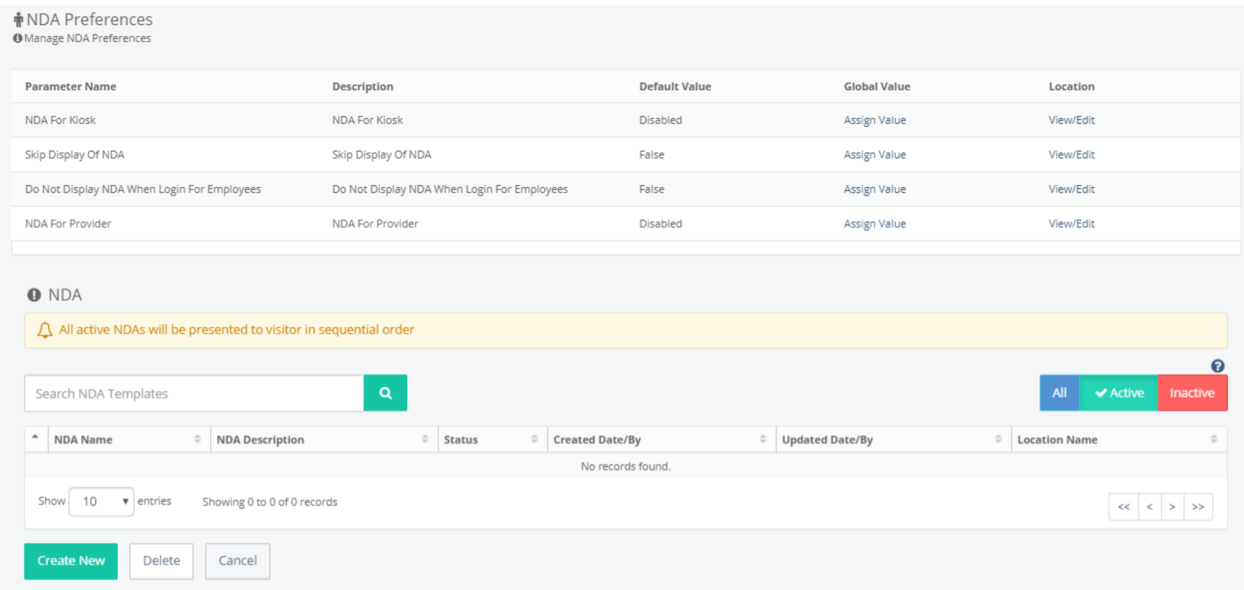


A pop-up is displayed where the admin can provide details of the access level such as the role name, technical name, status and type. Enter all the details and click on Save. Once all the details of the action mapping and access levels are configured, the connector is ready to be used to provision visitor details across various visit types and badge ranges.

NDA (Non-Disclosure agreement)

The application allows for the creation and maintenance of Non Disclosure Agreements. These can be mandated for visitors to sign when they check-in and can be a single document or a sequence of documents with .pdf, .txt and .docx extensions.

The admin can access the NDA module by navigating to Setup -> NDA



NDA specific preferences are made available in this page for ease of configuration. The preferences available are:

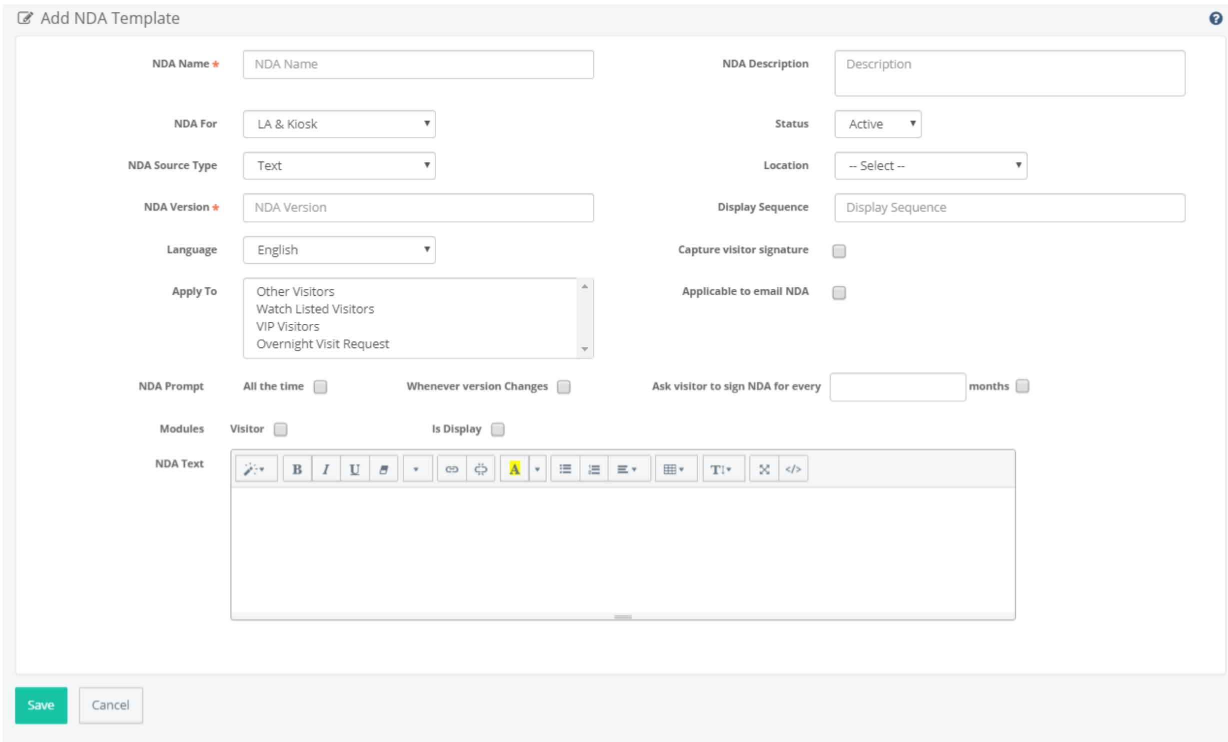
A) NDA for Kiosk : If you enable this flag, a walk-in visitor can view the NDA form, sign the form and then complete the registration process all on the self-service kiosk.

B) Skip Display Of NDA : This preference can be enabled for locations where the NDA need not be viewed/signed by the visitor. NDA display is skipped and the visitor can move directly through the registration process.

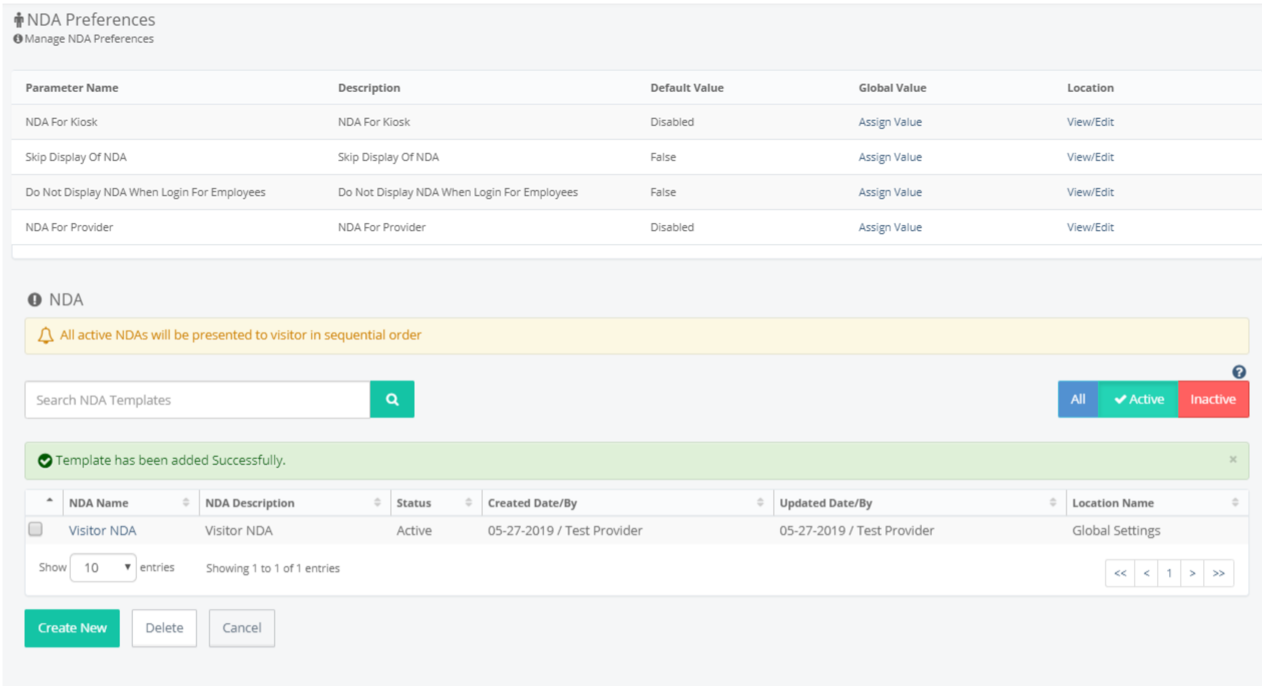
C) Do Not Display NDA When Login For Employees : Enable this preference when the NDA for employees need not be displayed

D) NDA For Provider: This preference when enabled allows the LA to ensure walk-in visitors and pre-registered visitors who are yet to check-in, sign the NDA before their appointment

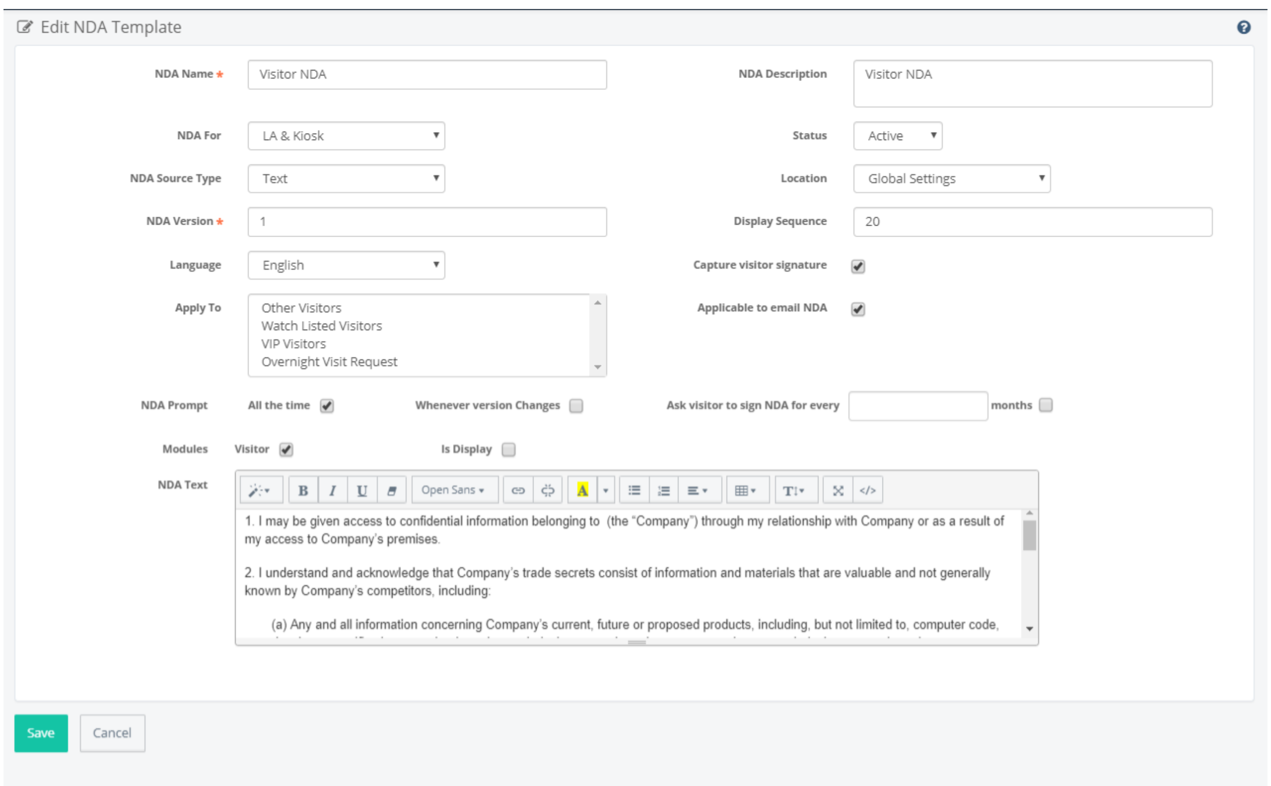
1. To create the NDA, click on Create New



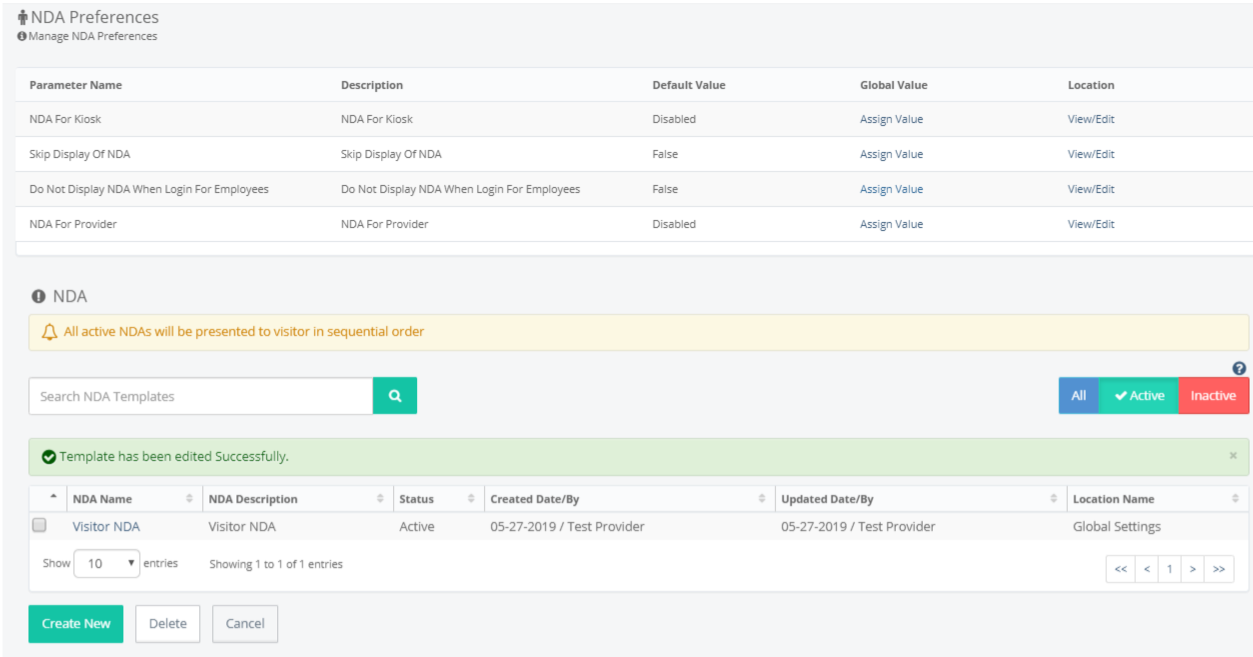
Enter all the details and click on Save. The NDA is added to the grid.



2. To edit the NDA, click on the NDA name.



In the Edit NDA Template page, make the necessary changes and click on the Save button

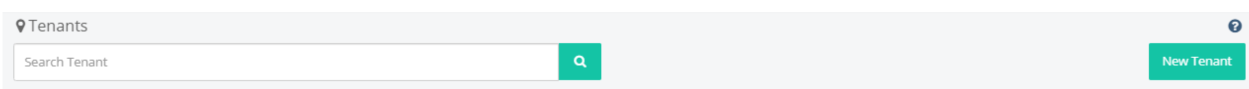


3. To delete the NDA, select the desired NDA record to be deleted and click on the Delete button.

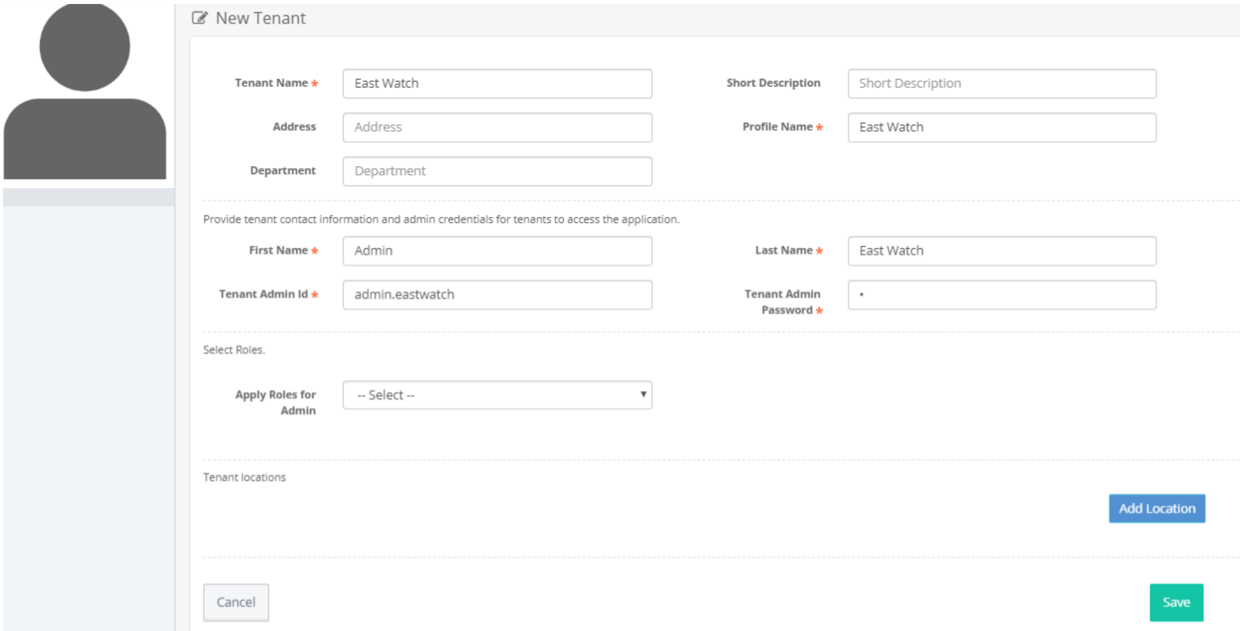
Tenants

The Tenants component allows an admin to view and maintain tenants and their profiles at one place. The admin can create and maintain tenant information including assigning roles and permissions, all in the Tenant module.

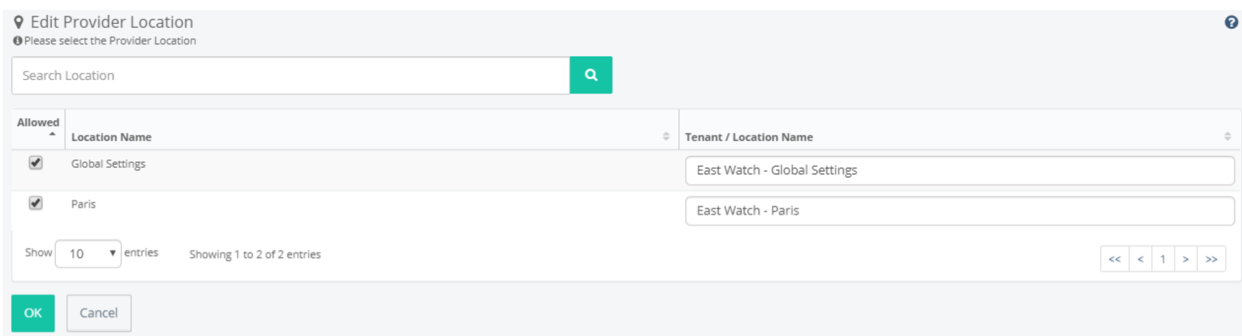
1. In order to create a new tenant, click on the 'New Tenant' button.



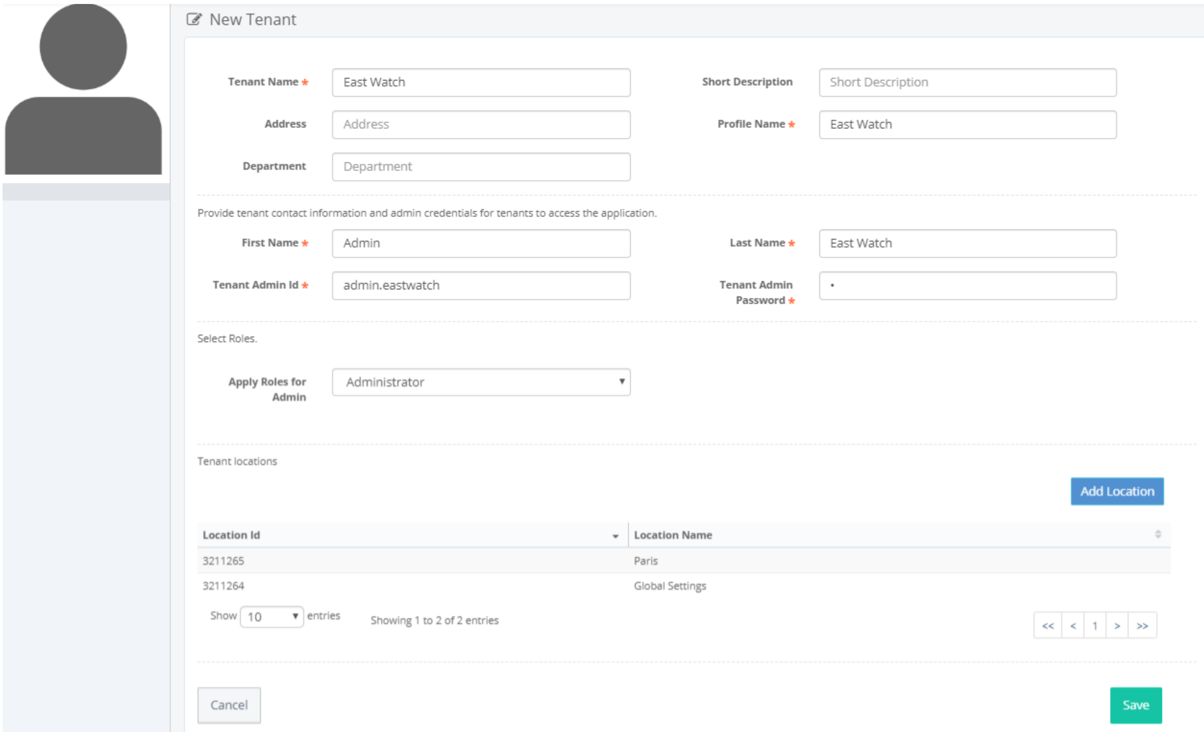
In the New Tenant page, enter the details such as the Tenant Name, Profile Name. Tenant contact information and admin credential details will need to be provided. These credentials can then be used to access the application.

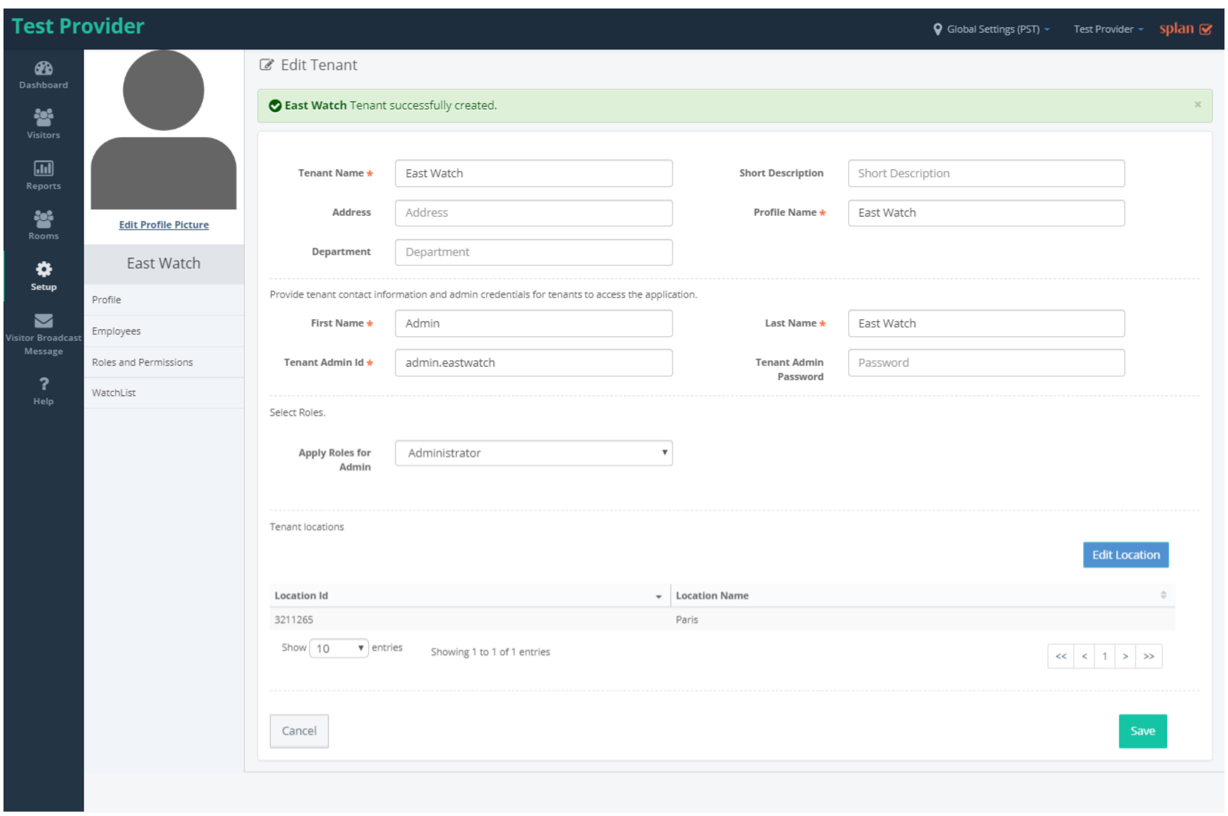


Click on Add Location to select the list of locations that the tenant would be based out of and then click on the OK button

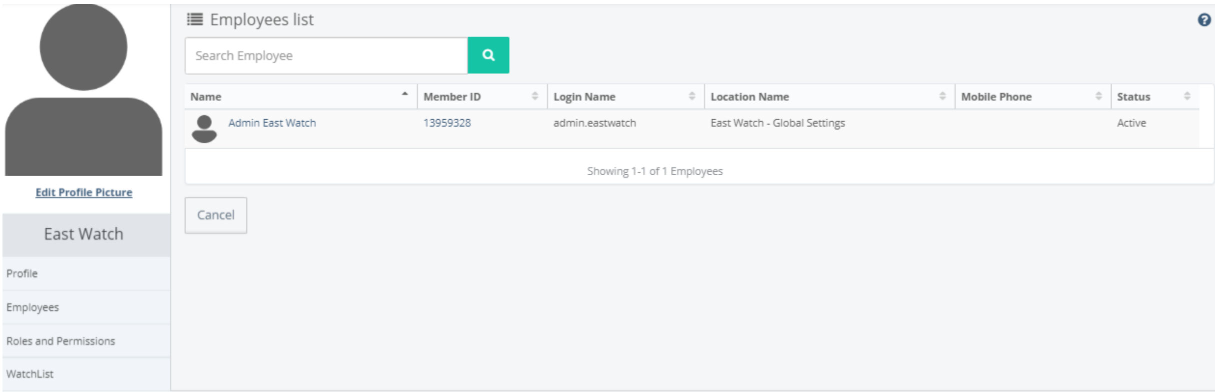


Now select a role from the Apply Roles for Admin dropdown and click on Save.

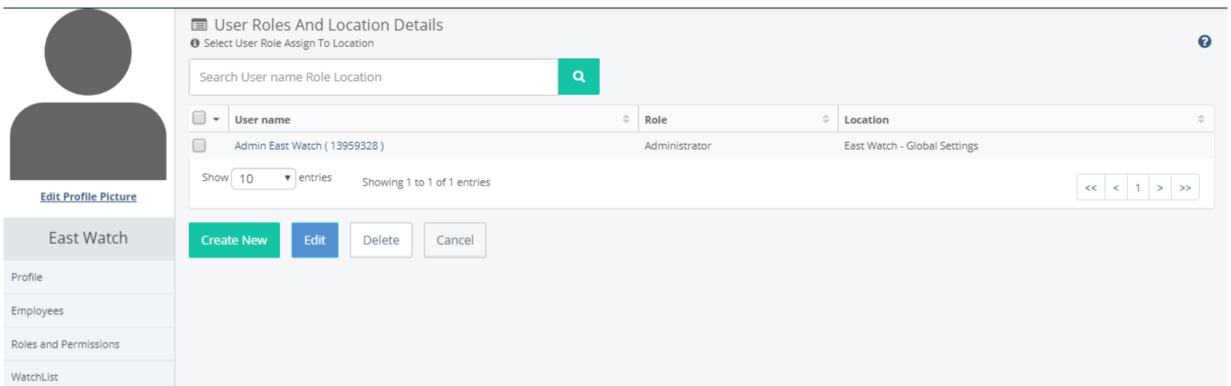




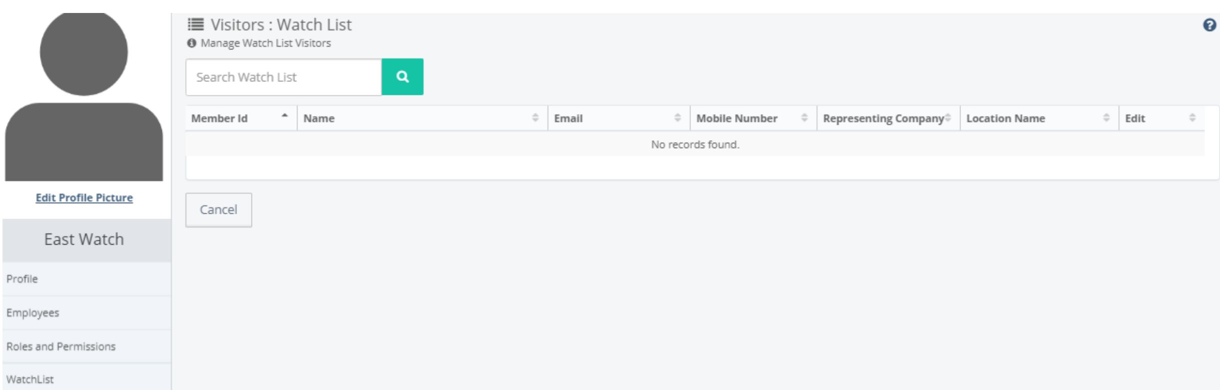
The admin can now upload a profile picture for the tenant. The list of employees can be viewed by clicking on the Employees link under tenant profile.



User roles and permissions can be assigned to tenant employees just as they are done at the parent provider level.



The watchlist profiles can be viewed in the Watch List link



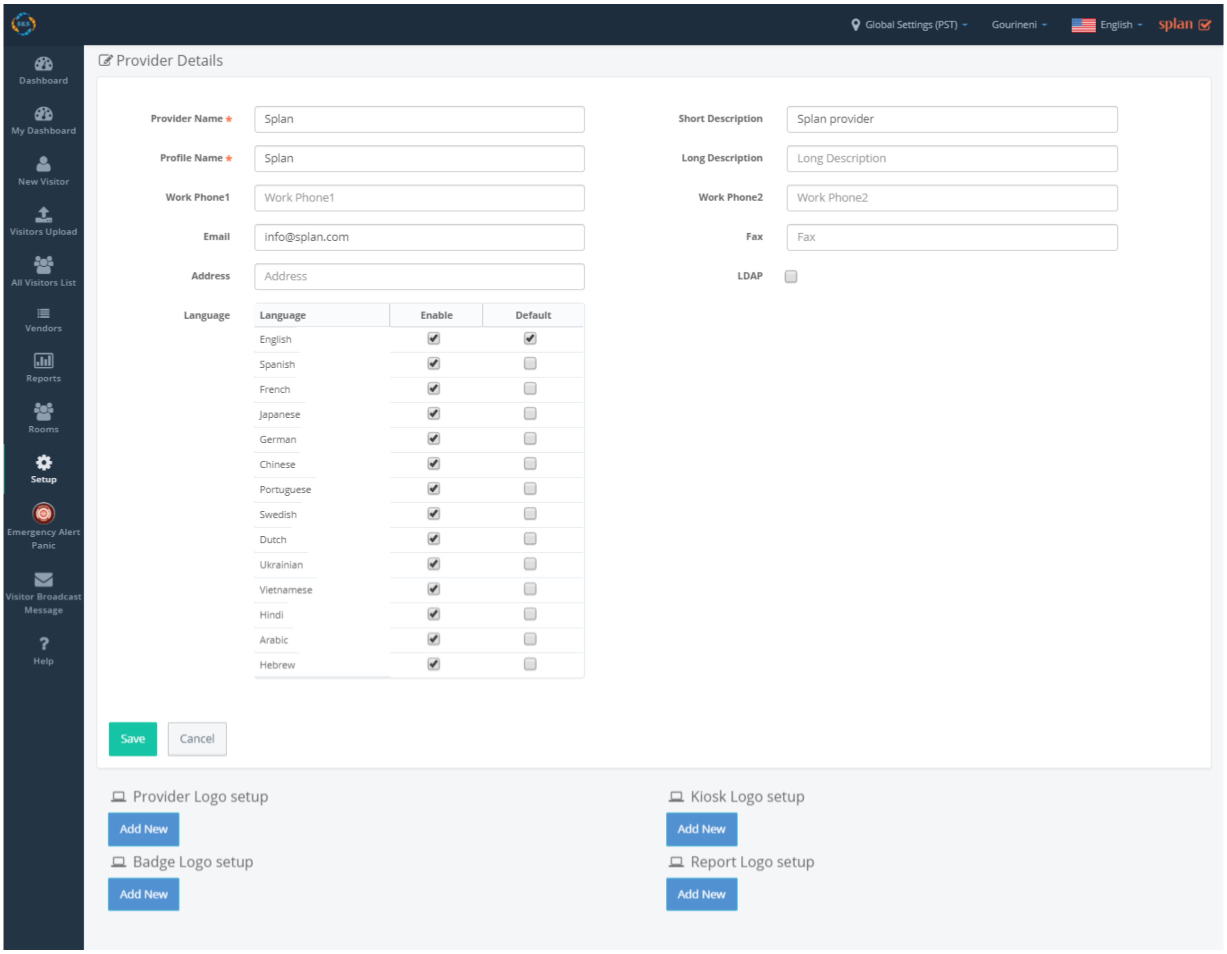
Provider Details

In order to access the provider details component, click on Setup -> Provider Details. This component gives the admin the ability to add details such

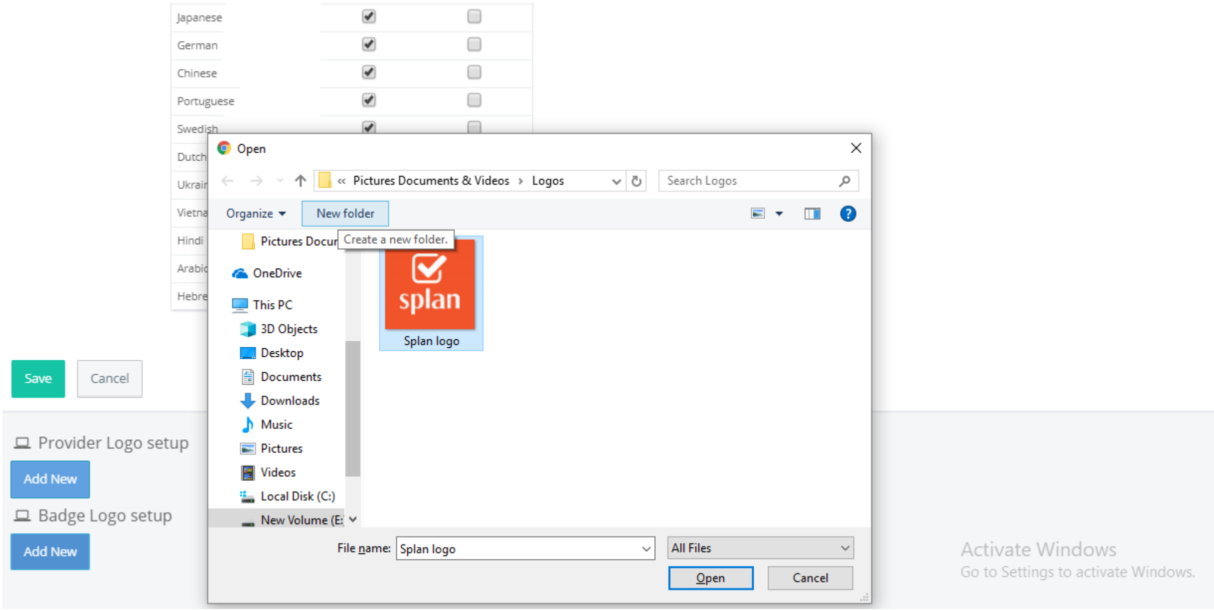
A) enabling LDAP authentication by clicking on the LDAP checkbox

B) selecting a default language along with other supported languages that are required

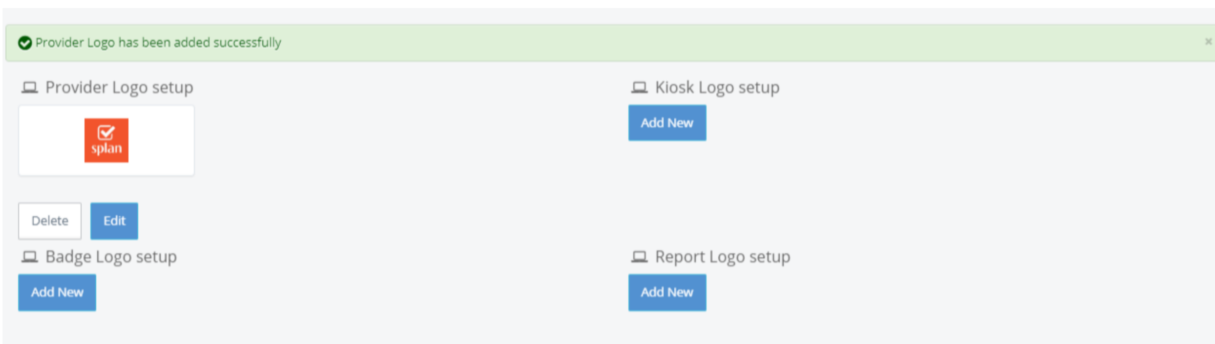
Additionally, the admin can Add New / Edit / Delete provider, report, badge and kiosk logos.



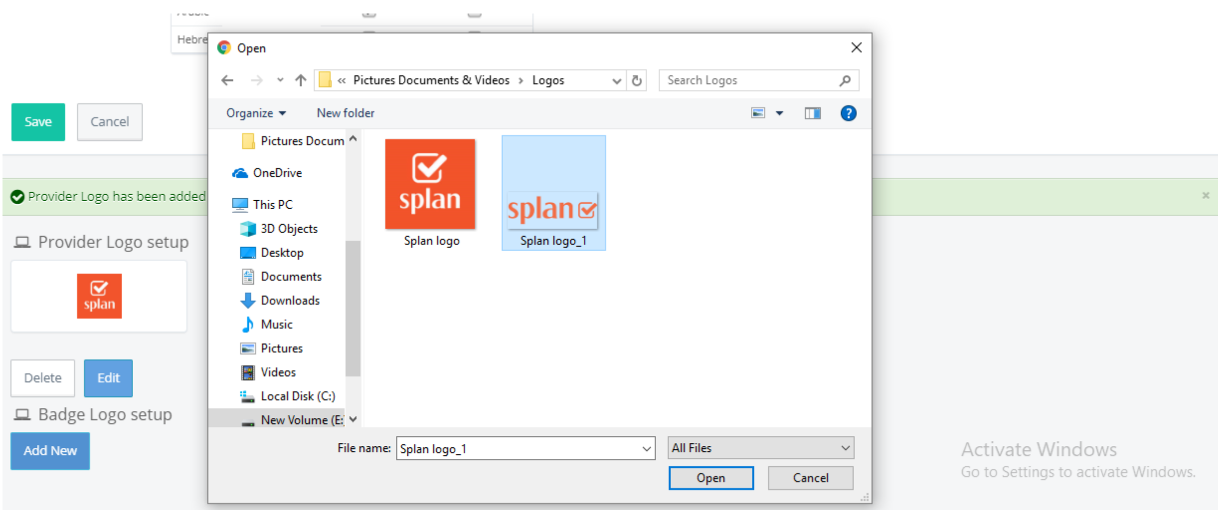
1. To add the provider logo, click on Add New under the Provider Logo setup



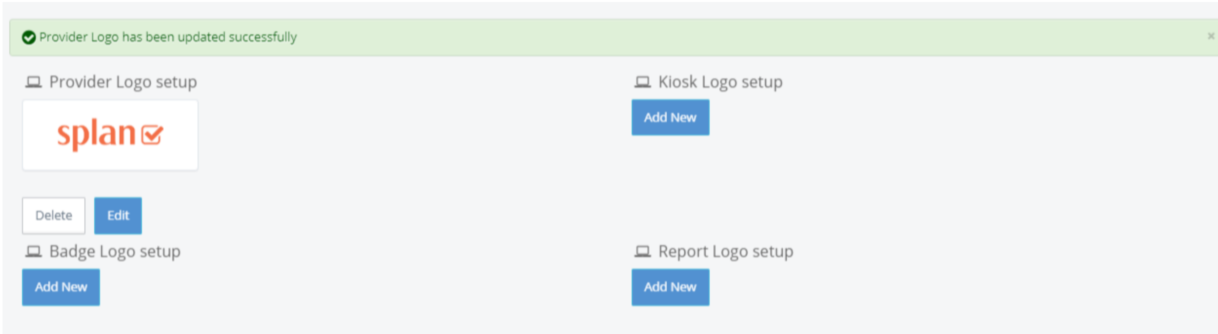
Select the logo and click on Open in the explorer window. The logo gets uploaded successfully.



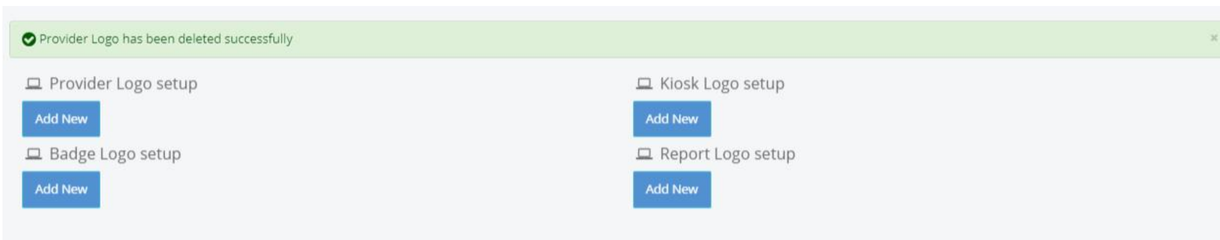
2. To edit the logo, click on the Edit button and select the required logo. Click on Open in the explorer window



The provider logo is updated successfully.



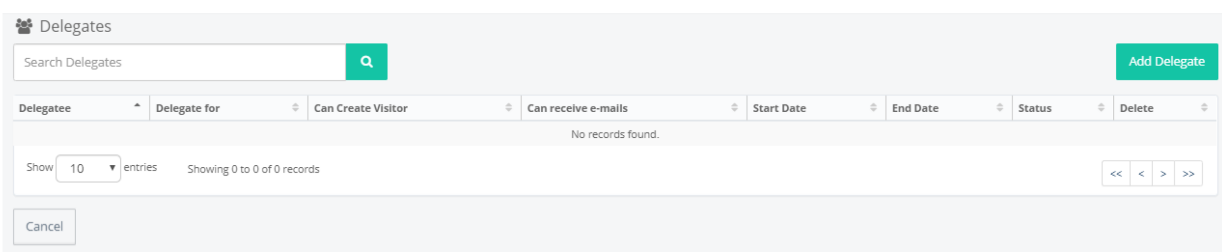
3. To delete a logo, click on the Delete button



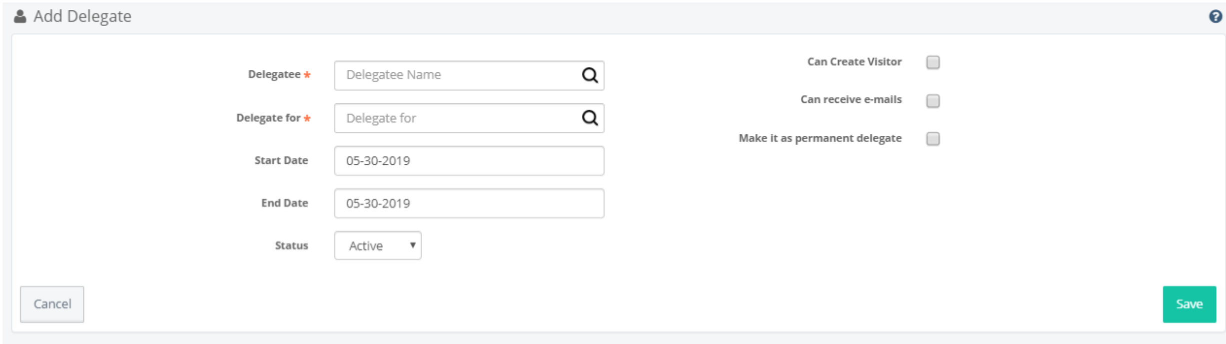
Similarly, the admin can add, edit and delete the kiosk, badge and report logos.

Employee Delegates

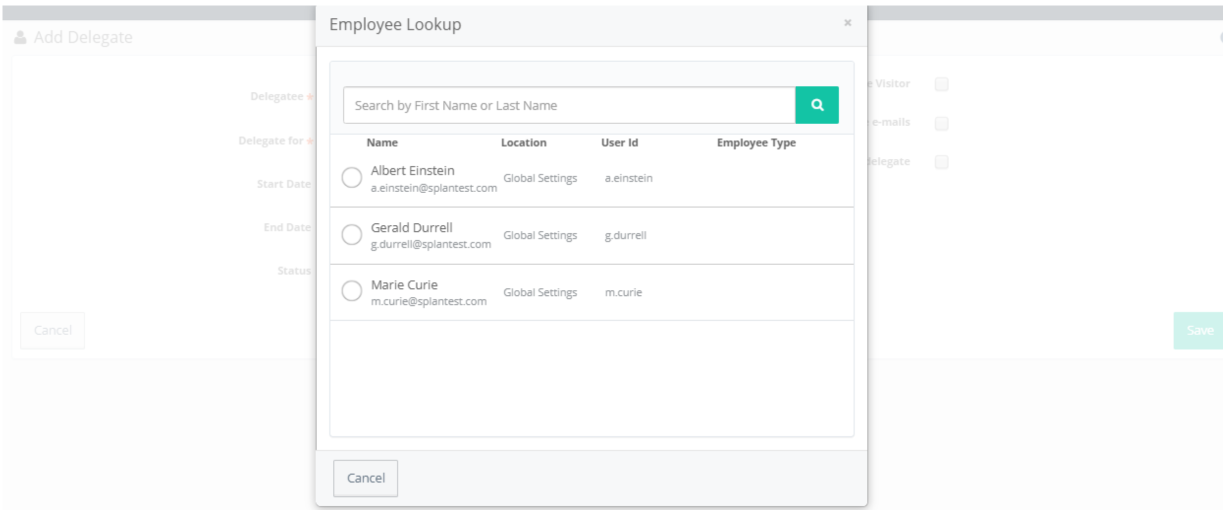
The visitor management application provides the ability for employees to delegate tasks to other employees. The setup for this functionality involved assigning one or more delegatees employees to one or more delegator employees. The admin can access the Employee Delegates functionality by navigating to Setup -> Employee Delegates

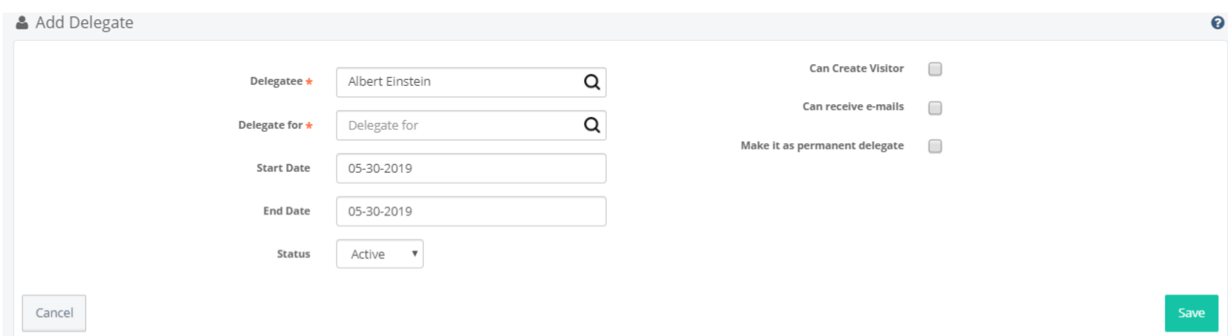


1. To set up an employee delegate, click on the Add Delegate button

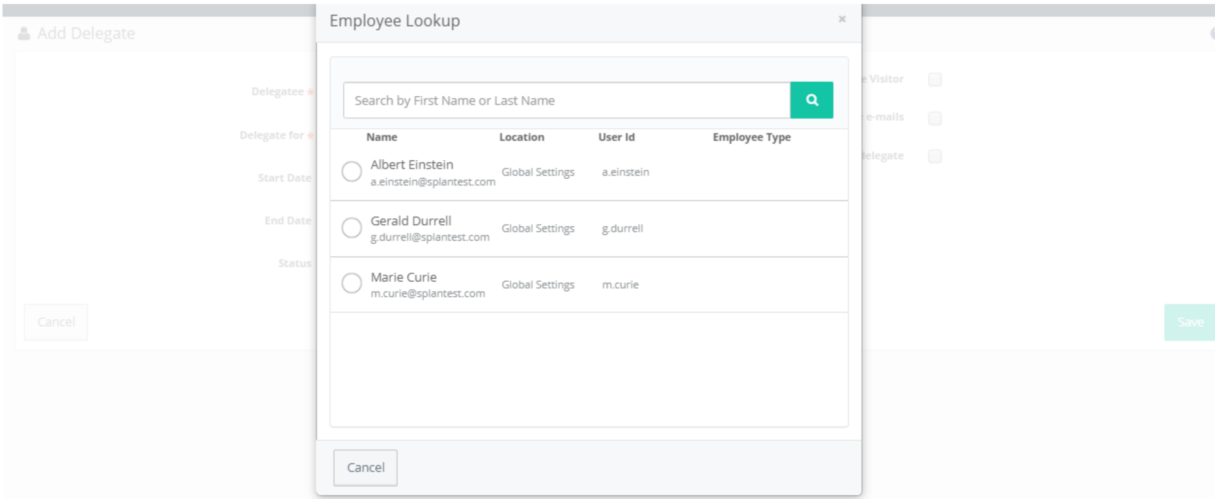


In the Add Delegate page, click on the Delegatee field and select the delegatee employee from the Employee Lookup pop-up.

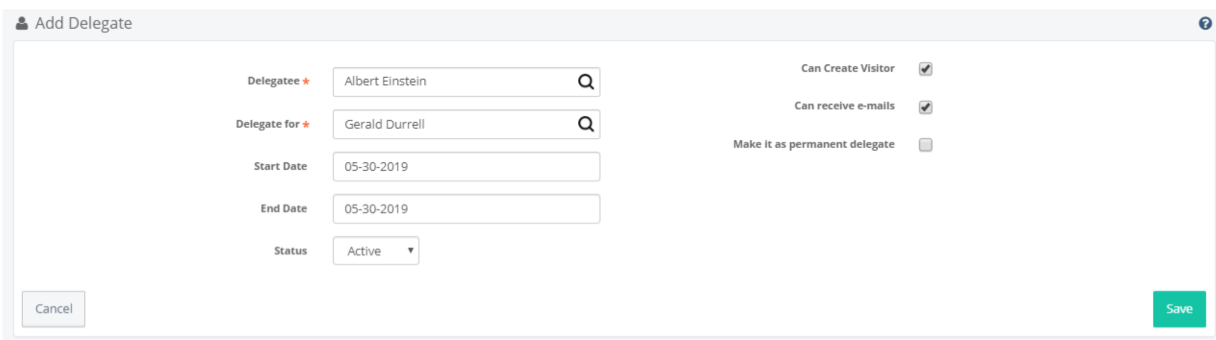




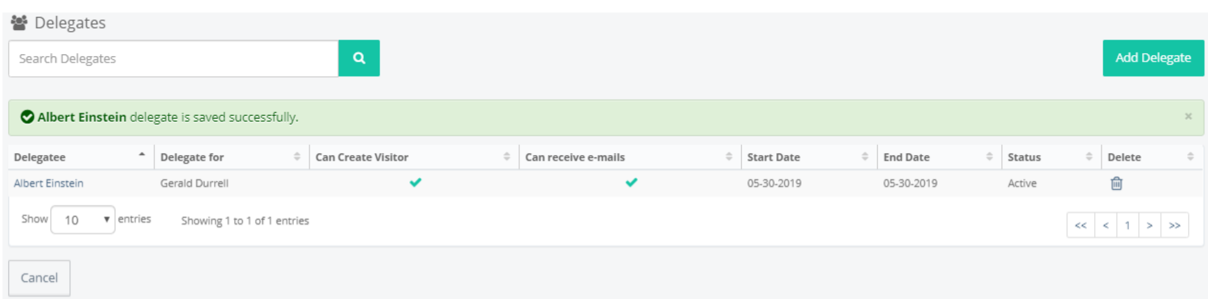
Similarly, click on the Delegate for field and select the delegator from the Employee Lookup pop-up



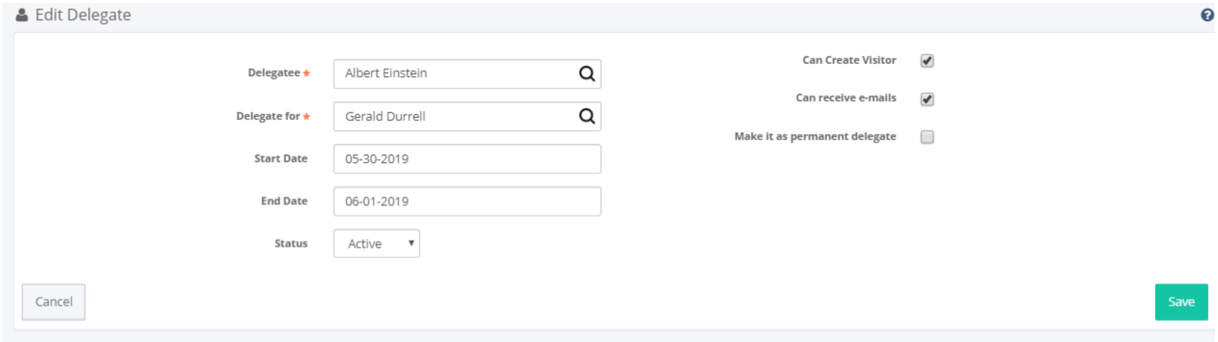
Select the Start Date and End Date. Select the privileges to be provided to the delegatee (Can Create Visitor and/or Can receive e-mails). (Selecting the Make it as permanent delegate' makes the delegate setup permanent irrespective of the end date)



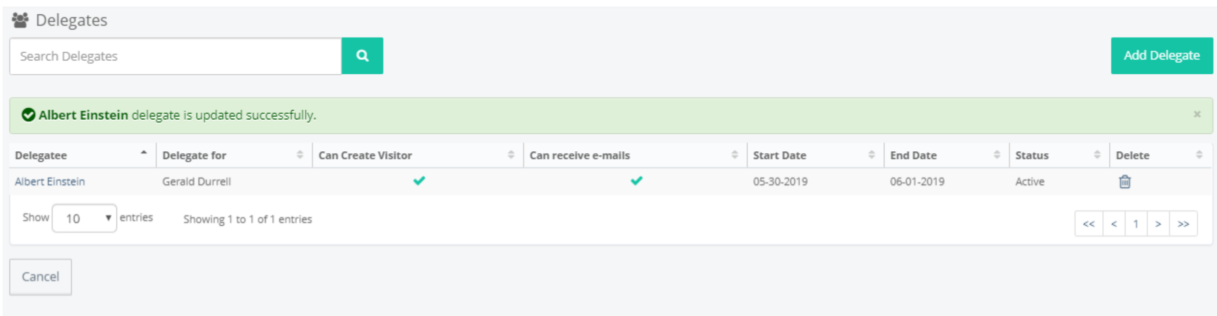
Click on Save.



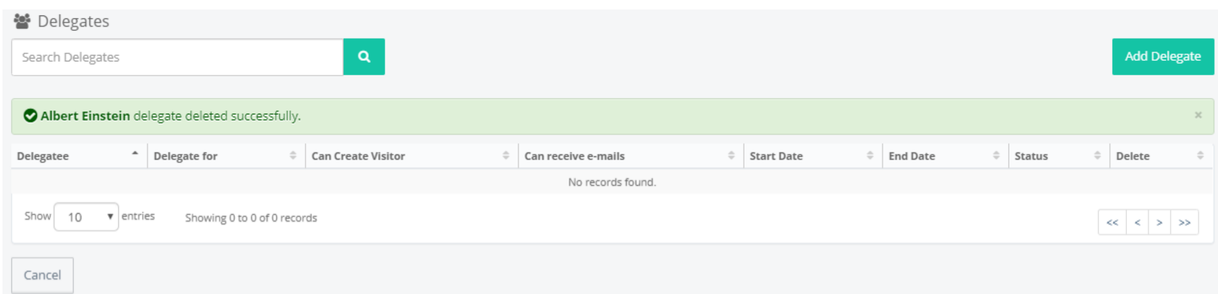
2. To edit the delegate setup click on the Delegatee. In the Edit Delegate page make the required changes.



Click on Save

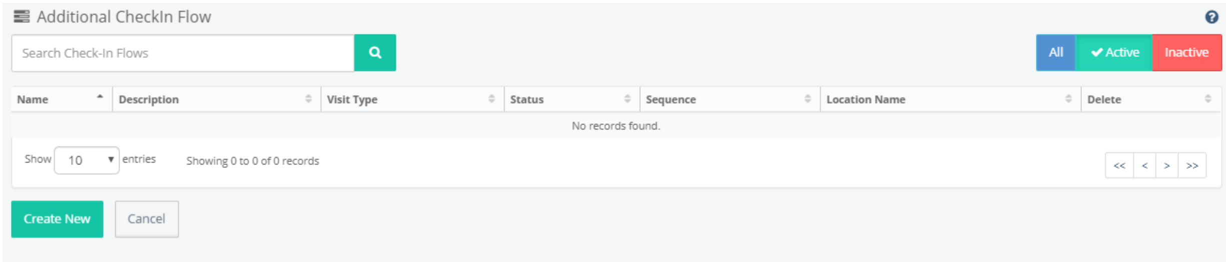


3. To delete the delegate, click on the delete icon in the Delete column

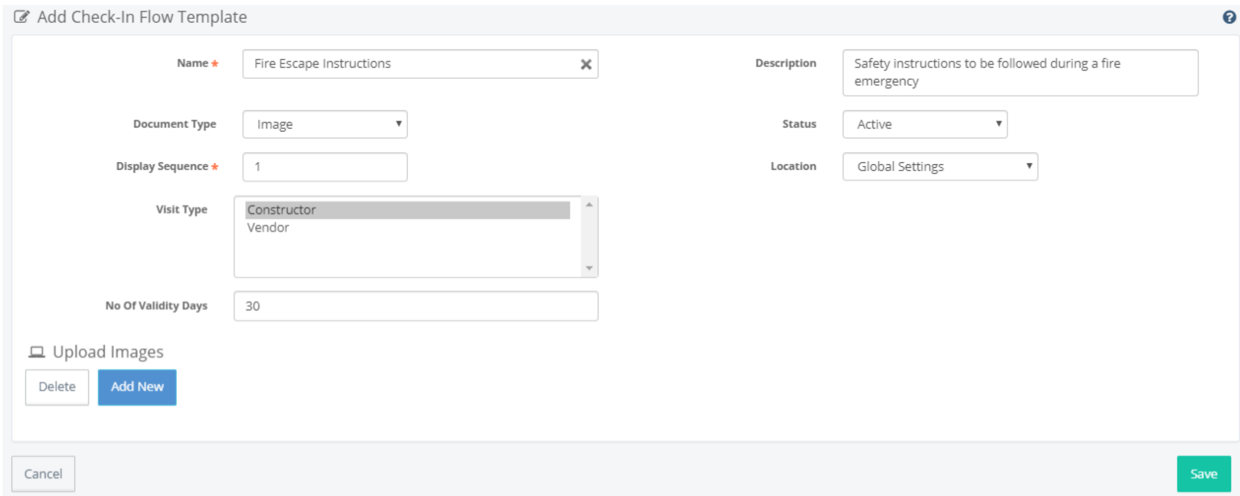


Additional CheckIn Flow

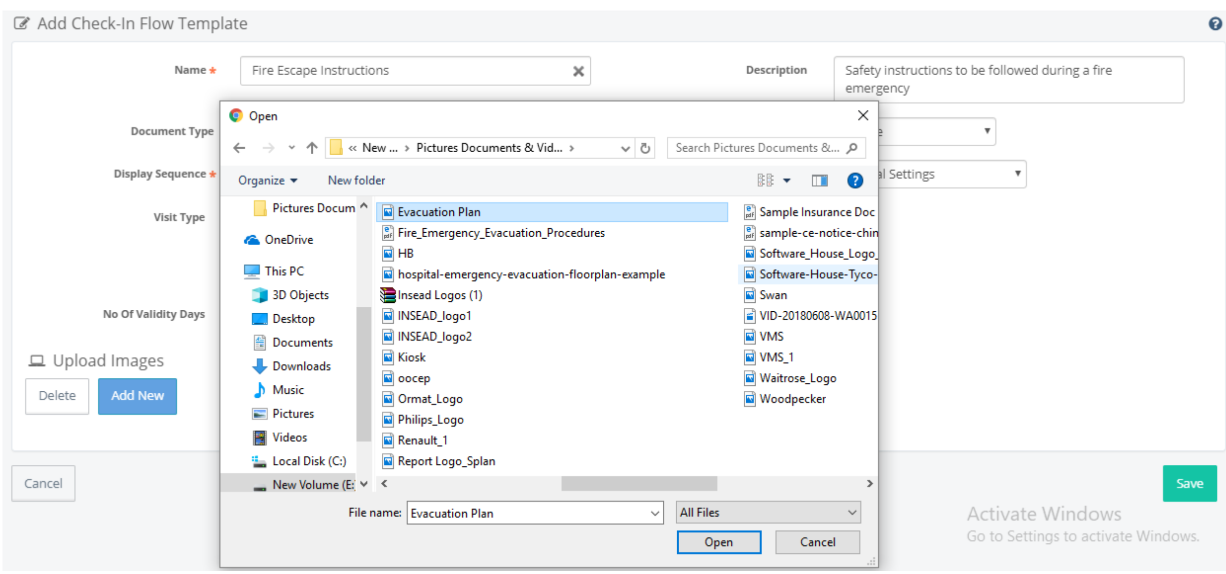
The admin can use the Additional Check-in Flow component to configure additional images/videos/documents for the visitor to review/sign/accept terms and conditions during check-in. This flow can also be configured to be displayed for specific visit types. The admin can also configure the sequence in which the documents appear by providing a display sequence. The admin can access the Additional Check-in Flow component by navigating to Setup -> Additional Checkin Flow.



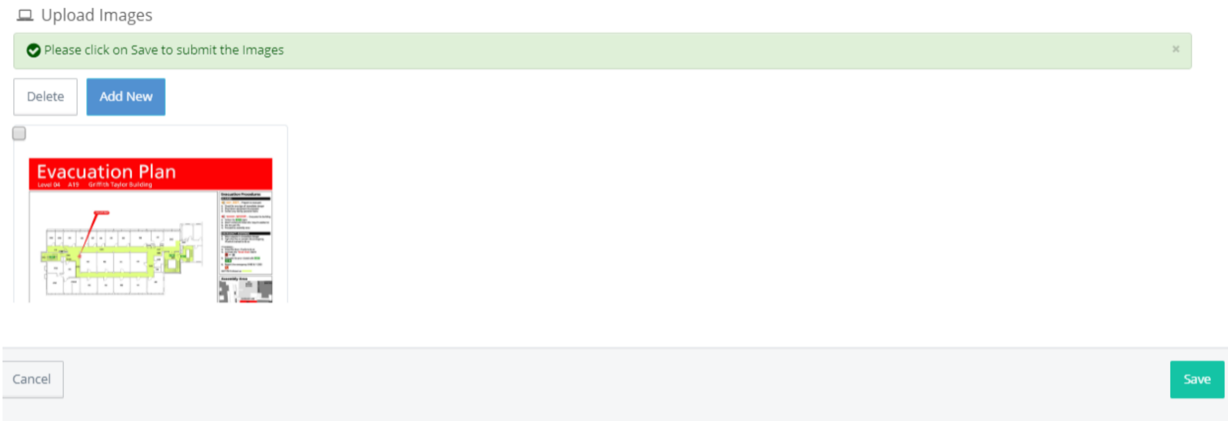
1. To add files to the additional checkin flow, click on Create New to access the Add Check-In Flow Template screen. Enter all the required details.



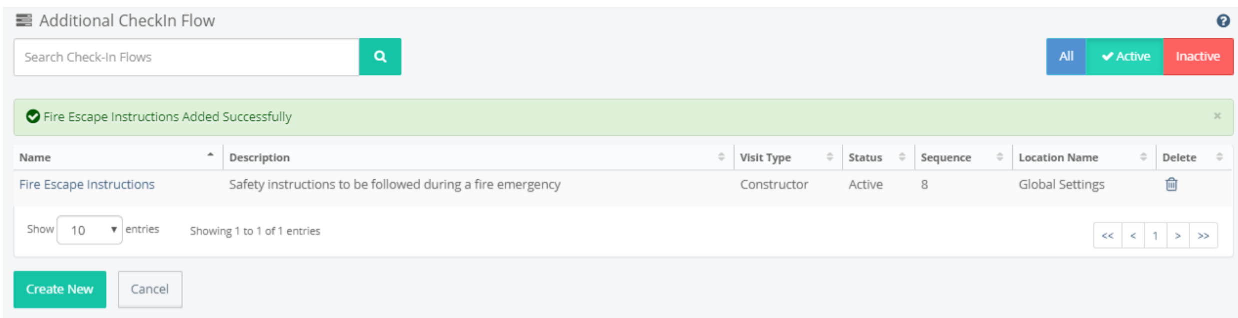
Click on the Add New button to upload the image



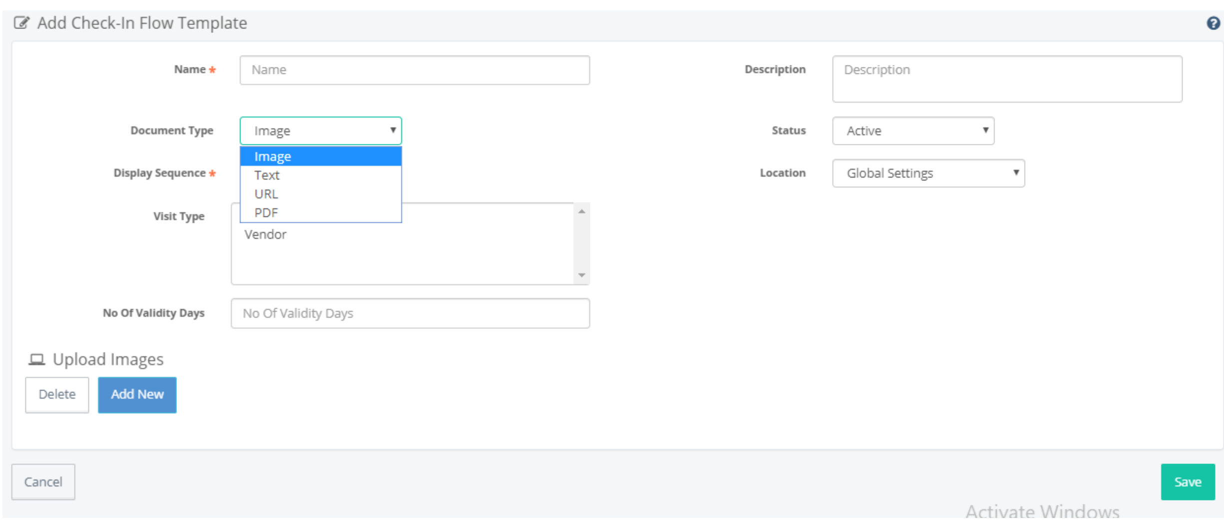
Click on Save



The document is saved successfully for the selected visit type.



A) The type of documents that can be uploaded / added include Image, Text and PDF. The admin can also add a video URL to be added to the check-in flow.

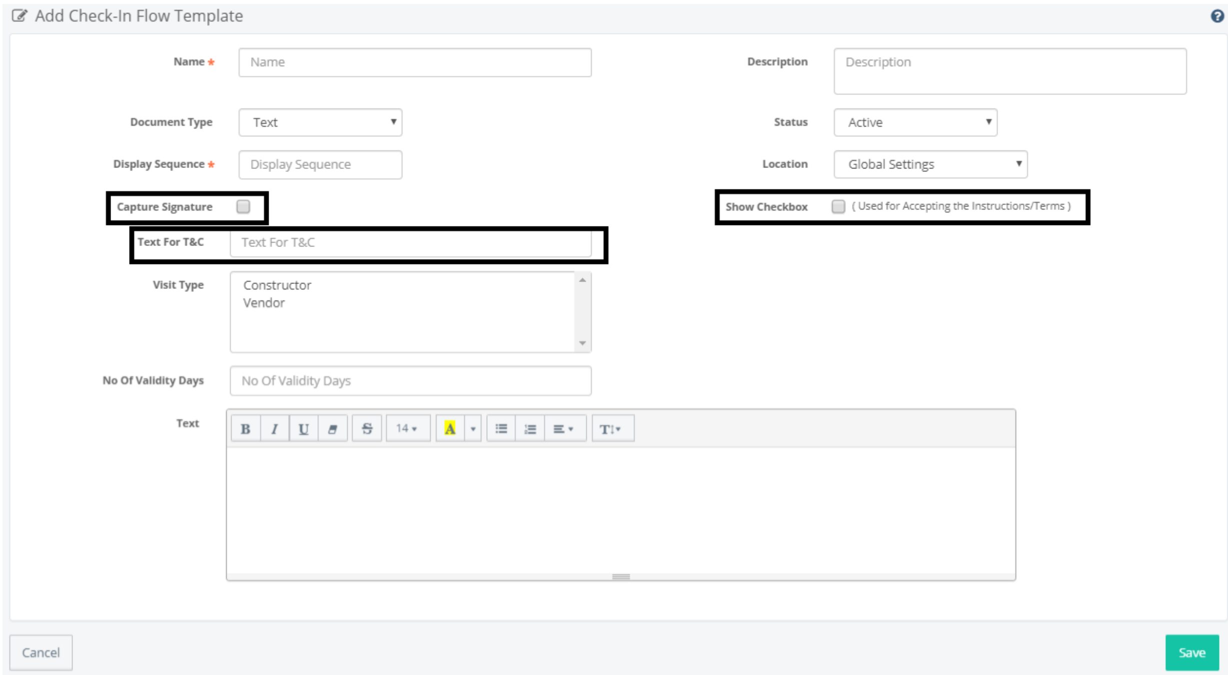


B) The No. Of Validity Days can be configured as per business processes. The next time the same visitor walks-in or is checking in, the check-in flow is triggered only if the validity has expired.

C) When the document type 'Text' is selected, the admin can configure the checkin flow to capture the visitor signature by selecting the 'Capture Signature' checkbox

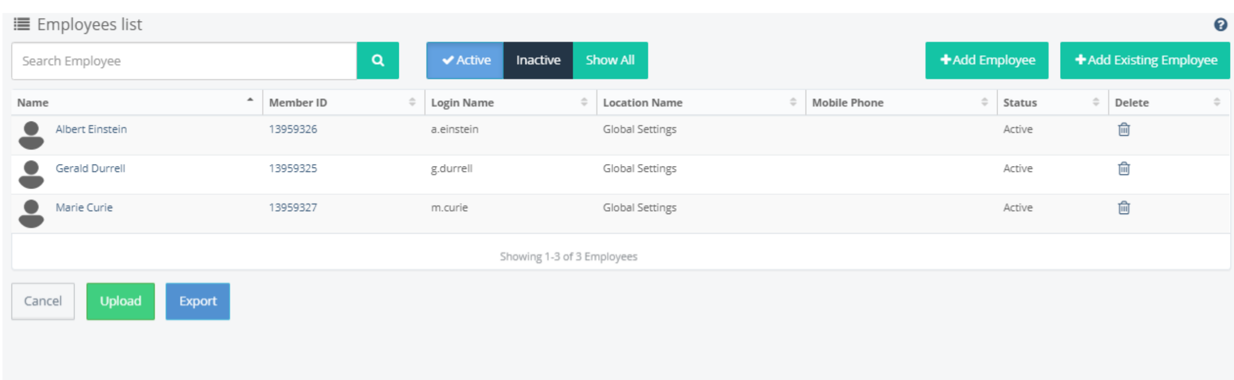
D) A checkbox requiring the visitor to accept terms and conditions can be selected by selecting the ‘Show Checkbox’ checkbox

E) The text for terms and conditions can be added in the Text for T&C field

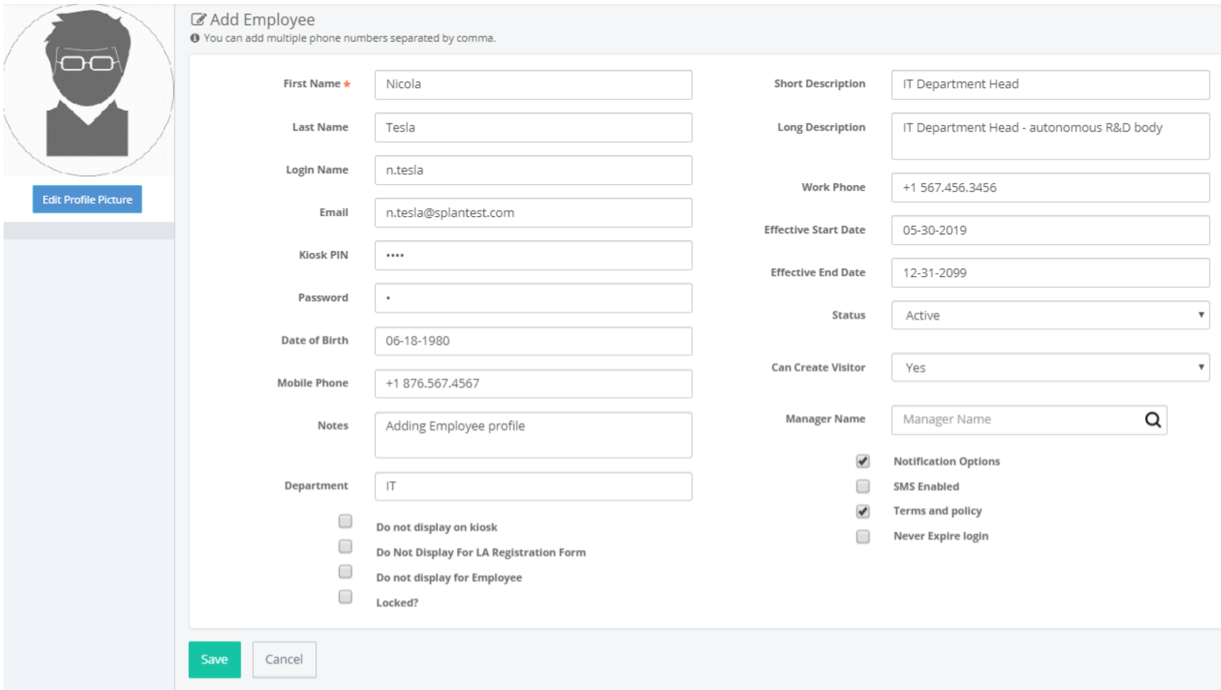


Employees

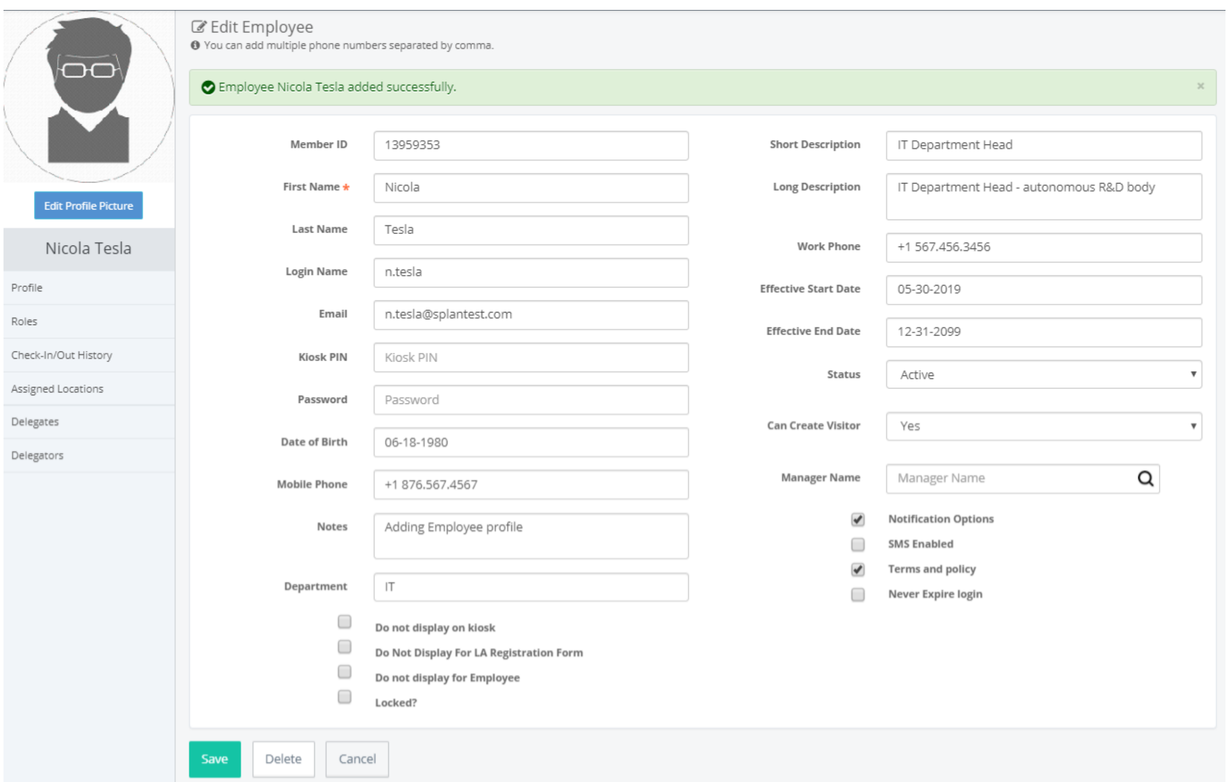
The Employee component allows the admin to view / add / edit employees to the application. The list of employees synced via active directories, FTP upload etc can also be viewed in the Employee component. In order to access this component, click on Setup -> Employee



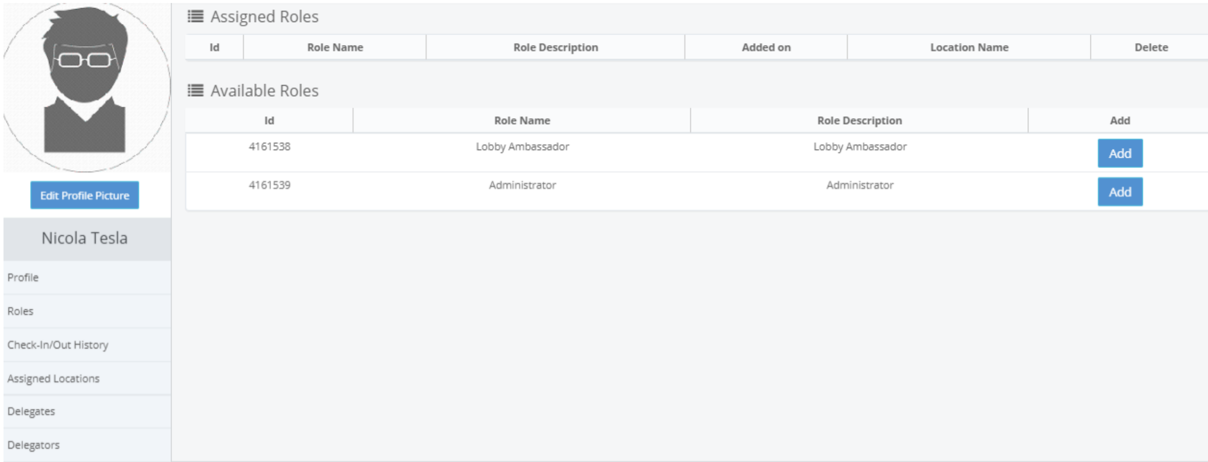
1. To add an employee click on the ‘+Add Employee’ button. Enter all the fields in the form. Click on Edit Profile Picture to upload an employee picture



Click on Save

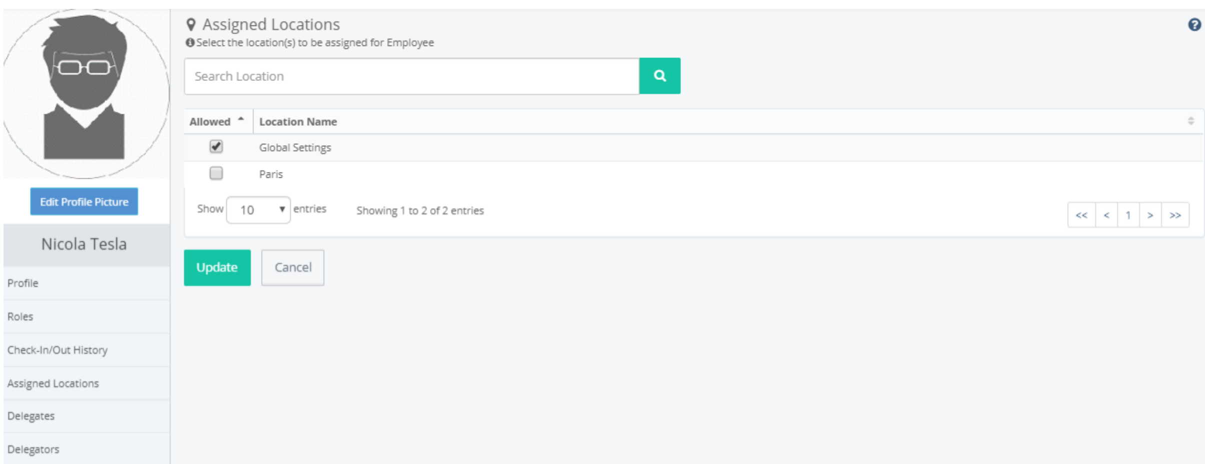


A) Click on the Roles link on the left hand side panel to view the list of roles that can be assigned to the employee. Click on ‘Add’ to assign the role to the employee



B) <check-in/out history link>

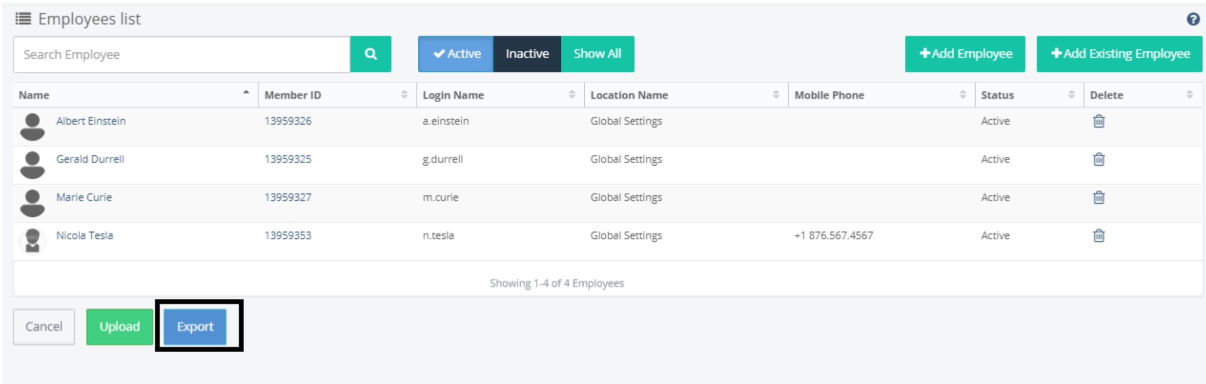
C) Click on Assigned Locations to view the locations the employee is assigned to. The admin can select other locations from the list and click on Update to save the changes to the employee profile



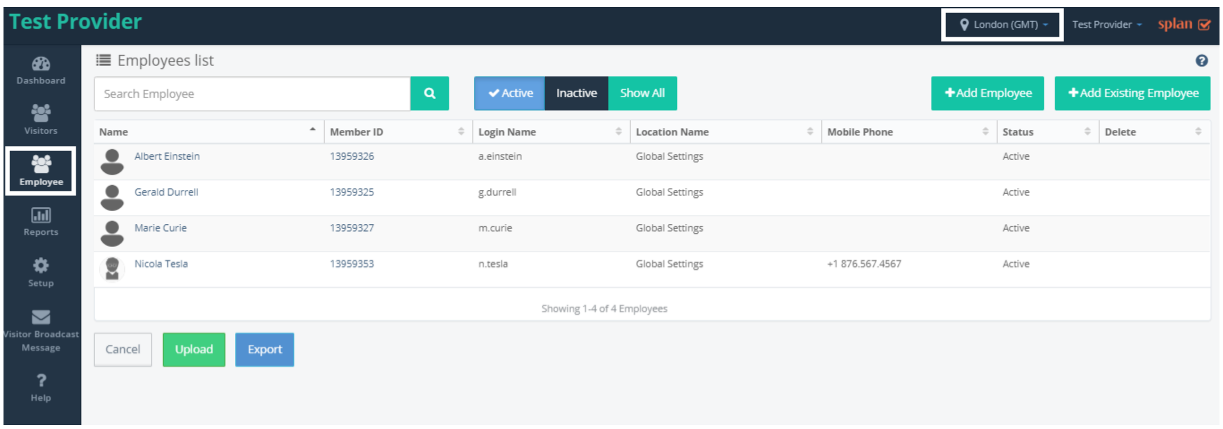
D) Click on Delegates link to view the list of any delegatees that have been setup for the employee

E) Click on Delegators link to view the list of delegatees the employee is assigned to

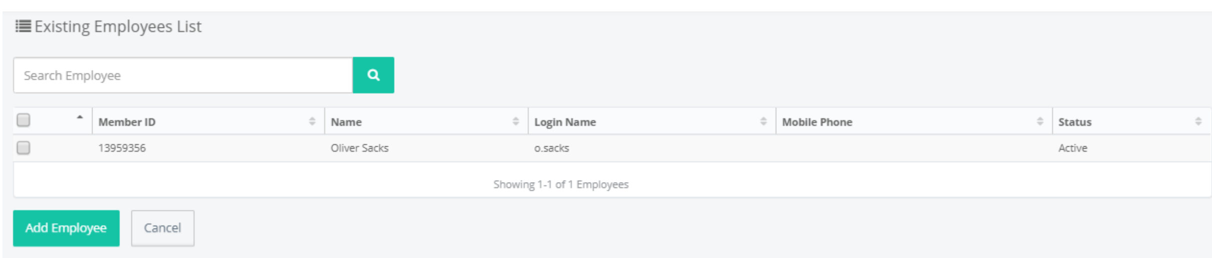
2. To export the list of all employee click on the Export link in the Employee List page. A CSV file is downloaded which contains the list of all the employees in the list



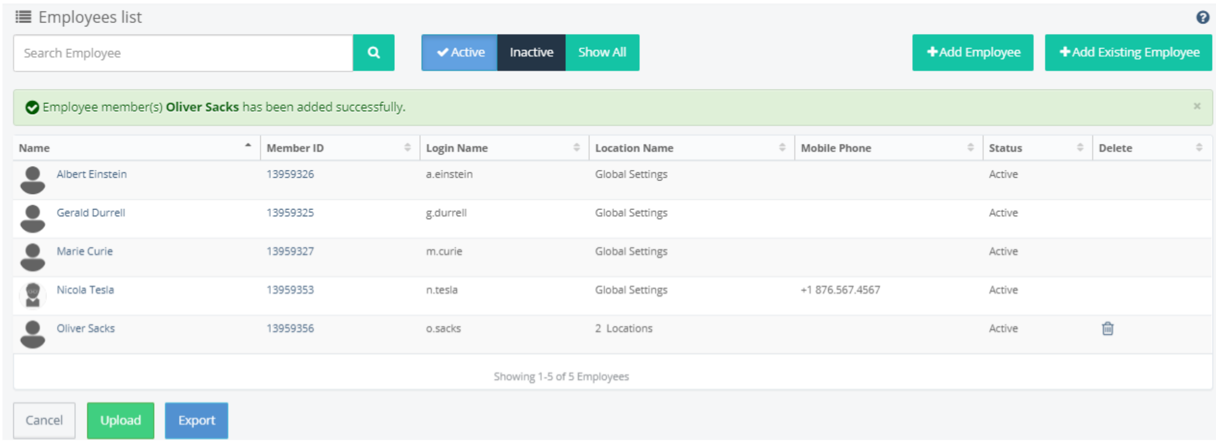
3. The '+Add Existing Employee' button can be used to move an employee from one location to another. To perform this activity, first select the local location from the Location dropdown and then click on the Employee link on the left hand side to view the Employee list



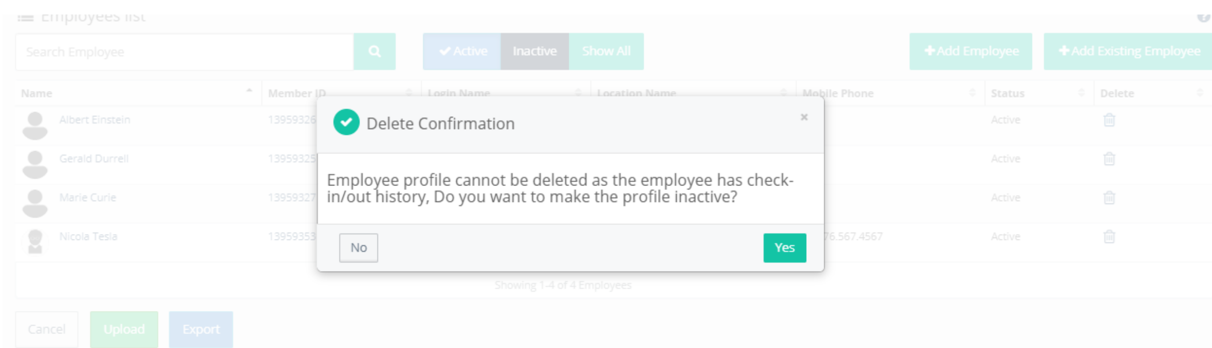
In the Employee List page, click on the '+Add Existing Employee' button



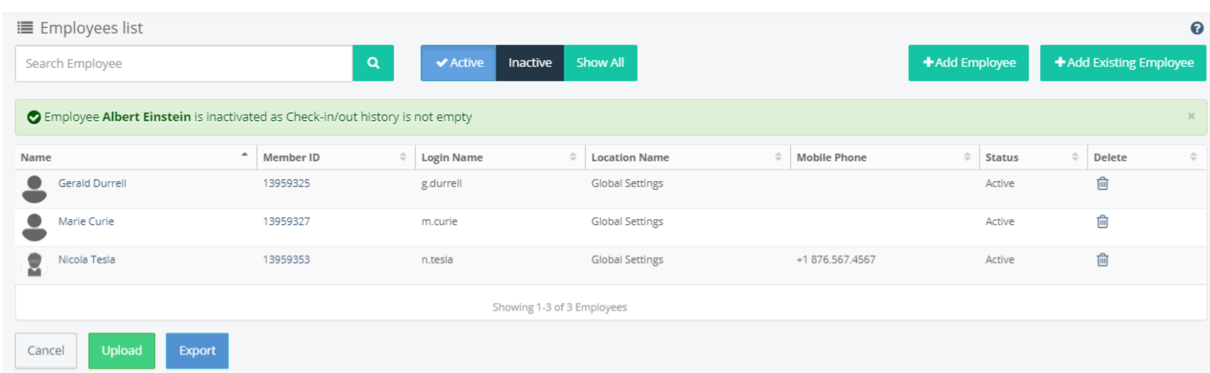
Select the employee record and click on Add Employee button. The employee is now added successfully to the second location as well



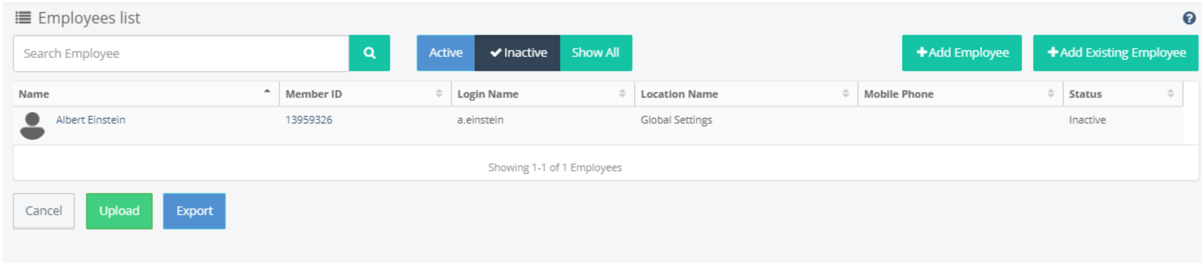
4. To delete an employee click on the 'Delete' icon under the Delete column. If the employee has check-in/out history (that is, if the employee has had or has visitor appointments), a pop-up is displayed with a message 'Employee profile cannot be deleted as the employee has check-in/out history. Do you want to make the profile inactive?'



Click on Yes to move the employee to inactive status. The employee record is then removed from the active list and moved to the inactive list.

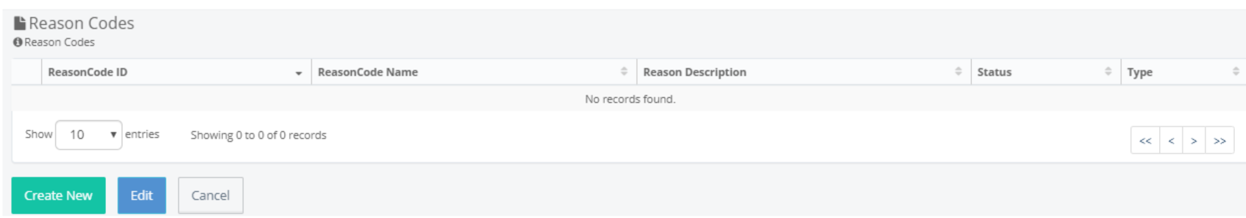


Click on the Inactive toggle button to view the inactive employee record

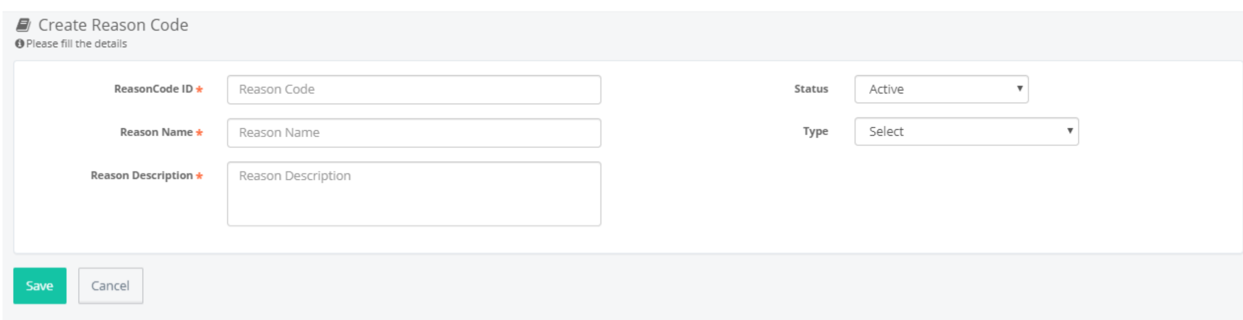


Reason Codes

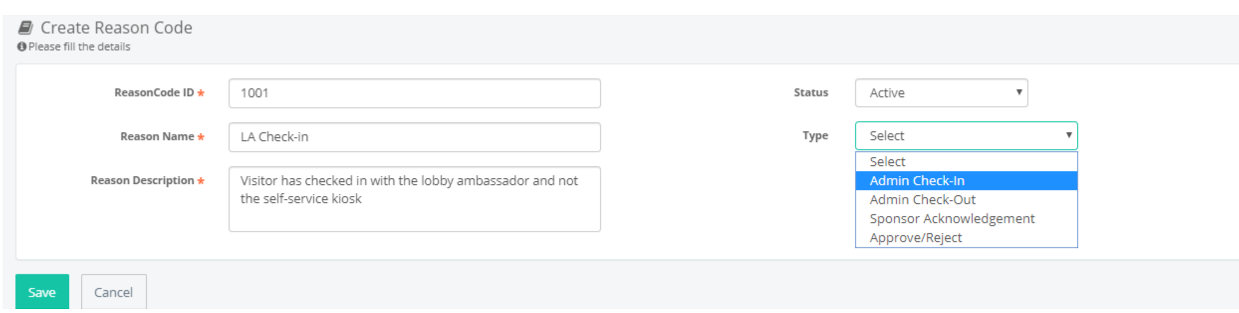
The Reason Codes component can be accessed via Setup -> Reason Codes. This component allows the admin to define reason codes that can be selected during various workflows such as check-ins, check-outs, approvals etc.



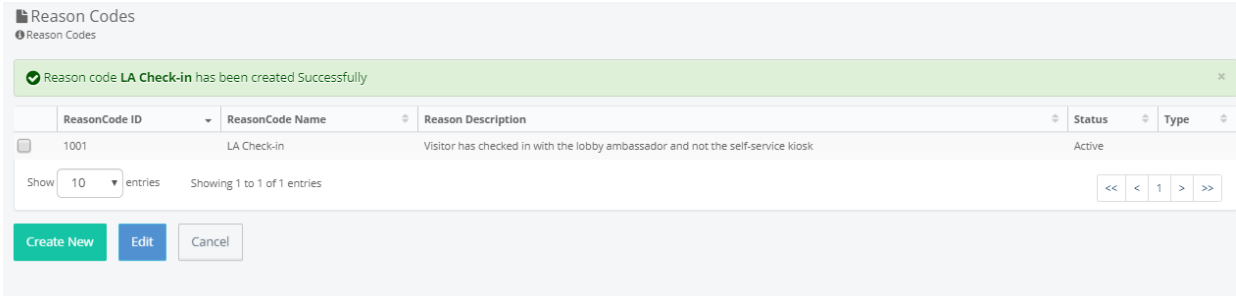
1. To create a new reason code, click on Create New to access the Create Reason Code



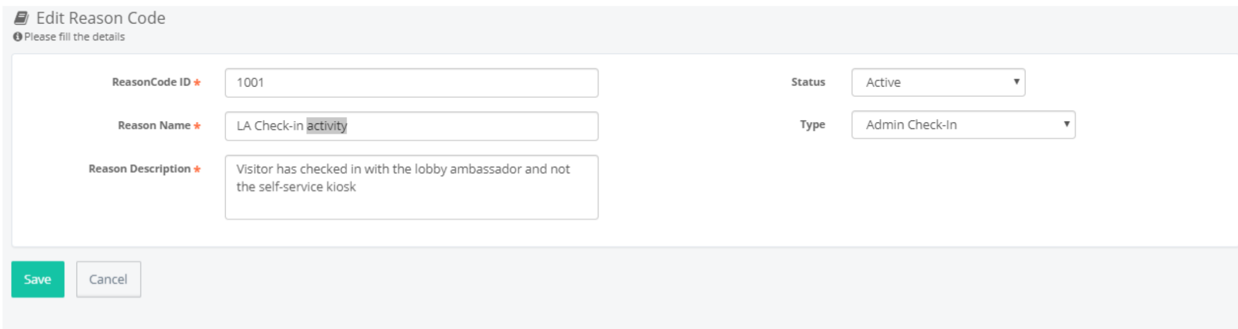
Enter all the details and click on Save



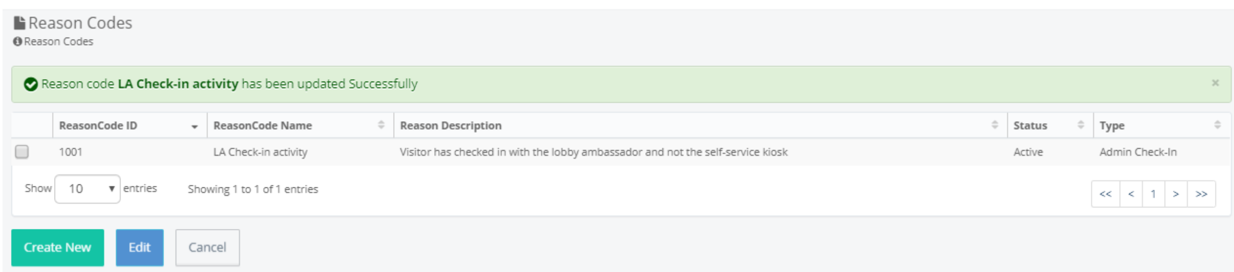
The reason code is created successfully



2. To edit the reason code, select the check-box next to the ReasonCode ID and click on Edit. In the Edit Reason Code screen make the required changes

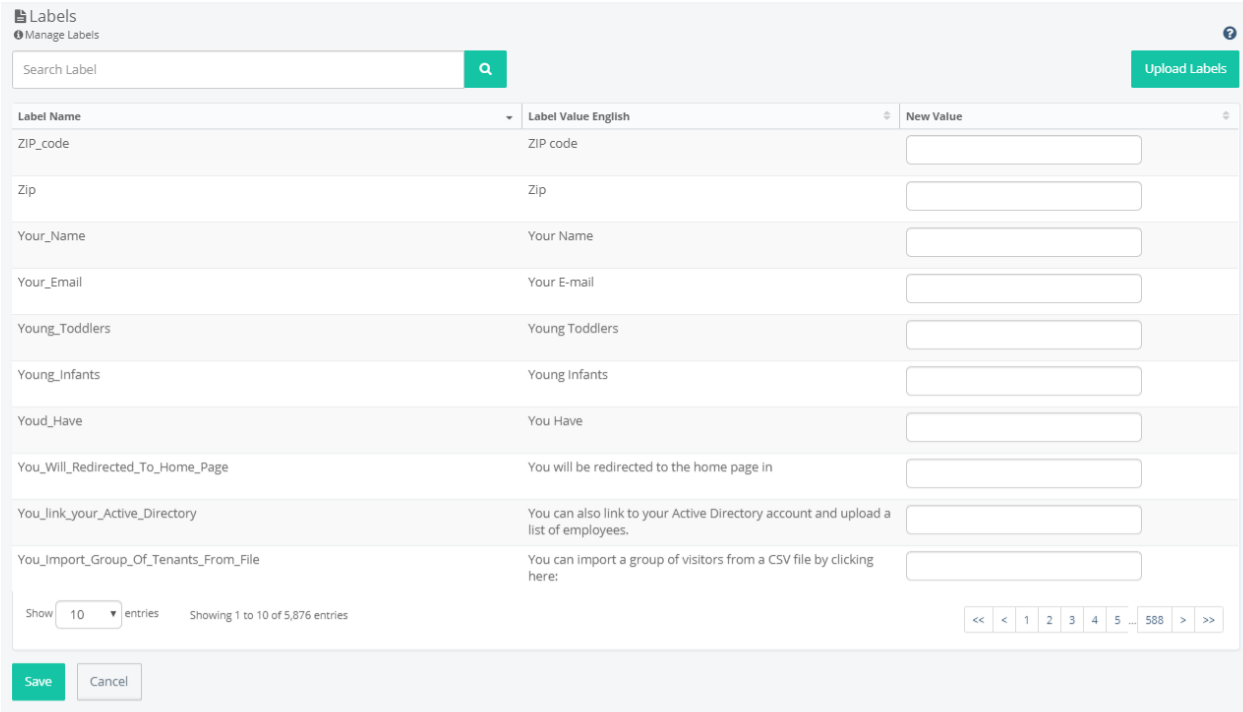


Click on Save. The changes to the reason code are updated.

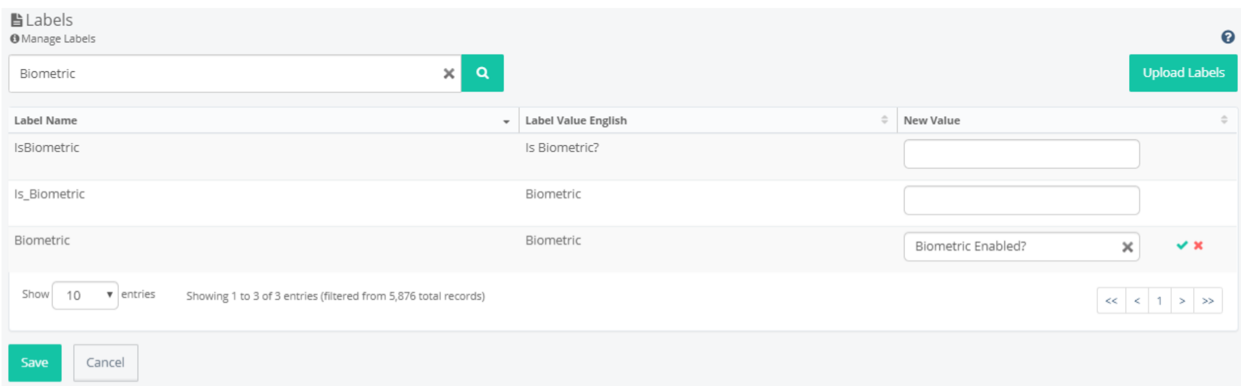


Labels

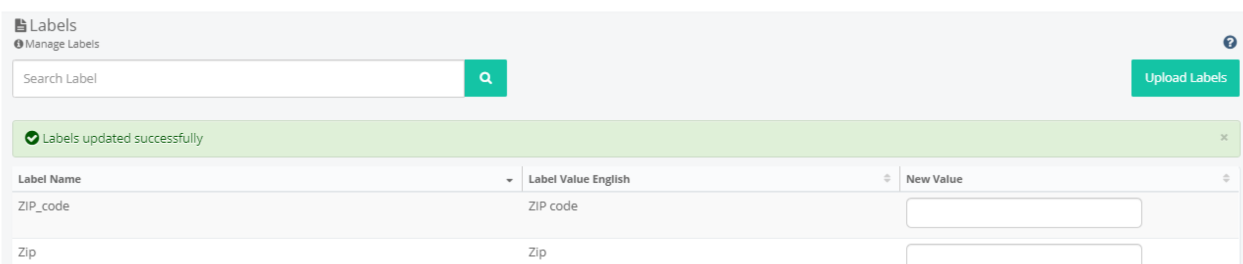
Label values in the application can be updated using the Labels component. The admin can access this component by navigating to Setup -> Labels. The label names and the corresponding english values are provided in the Label Name and Label Values English columns. The new value can be specified in the New Value field for the corresponding label



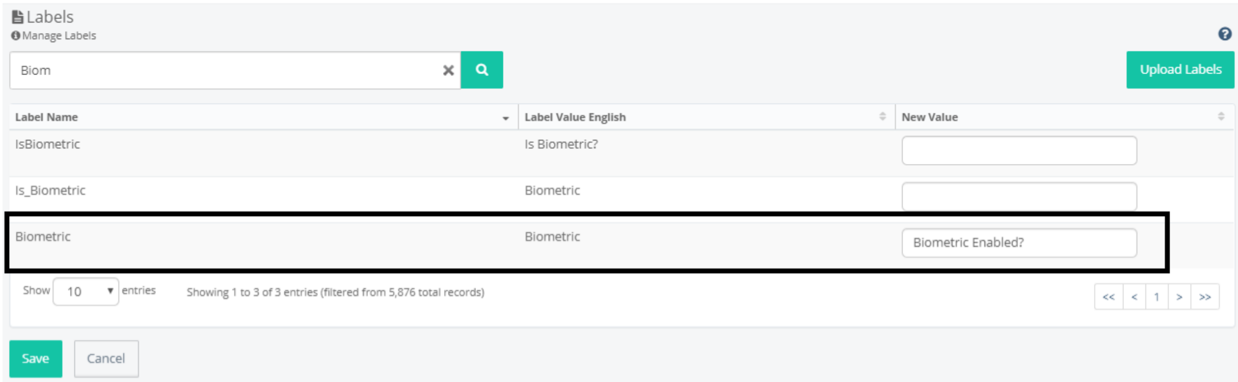
1. To update a label value, search for the label to be updated in the search box. Then enter the new label value in the field for the required label and click on the tick mark next to the field



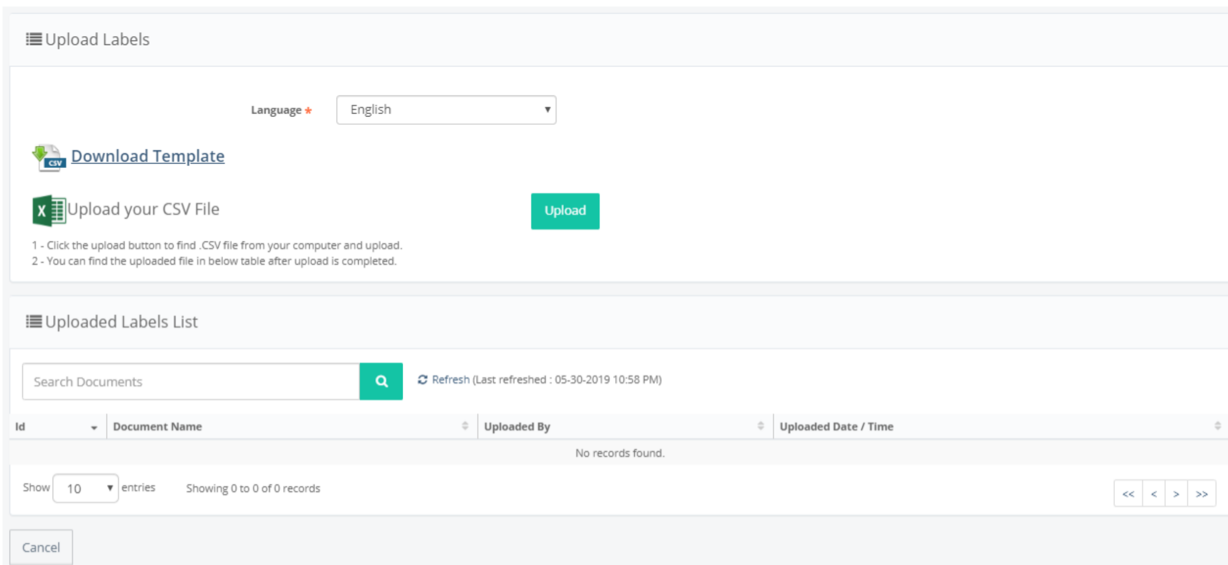
A confirmation message is displayed for the updated label



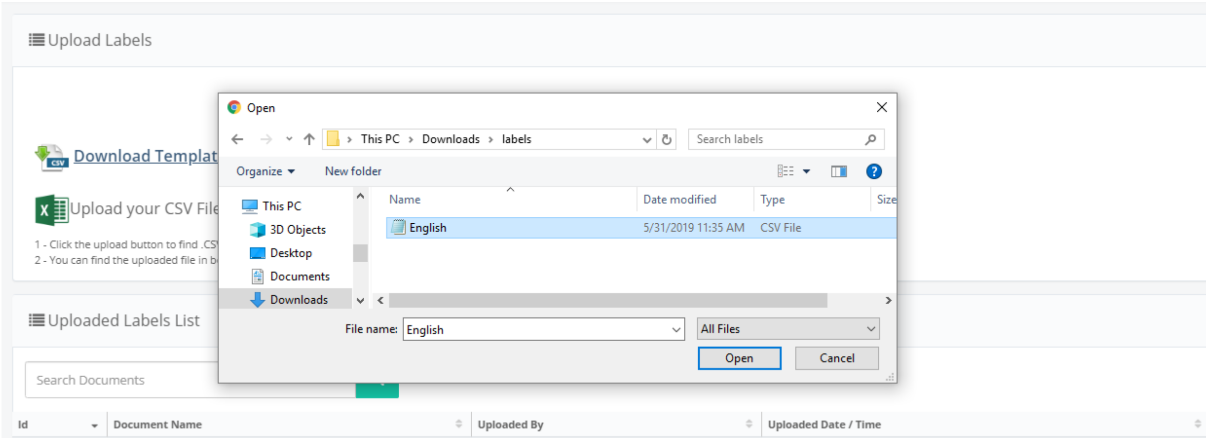
When the updated label is searched for again, the new value is prepopulated in the field. Now the new label will be effective wherever it is applicable in the application.



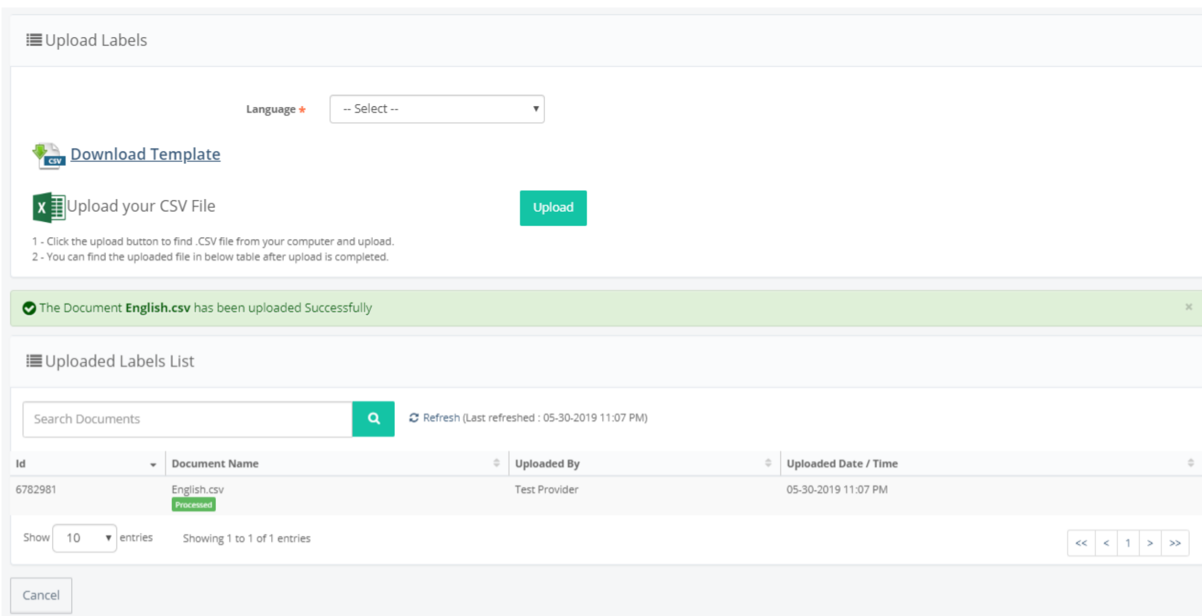
2. Labels can be uploaded in bulk using the Upload Labels functionality. Click on the Upload Labels button to access the Upload Labels page. Select a language from the Language dropdown and click on the Download Template link to download the sample file.



The downloaded file contains the list of all the available labels in the application displayed in two columns: label name and label_value_en (this indicates the label values in english. For other languages the downloaded file contains an additional column label_value_<other language> that is to be updated with the new value). The label_value_en column is to be updated with the new label as required. Once the changes are made in the downloaded file, click on the Upload button. Select the updated labels file and click on Open in the explorer window.

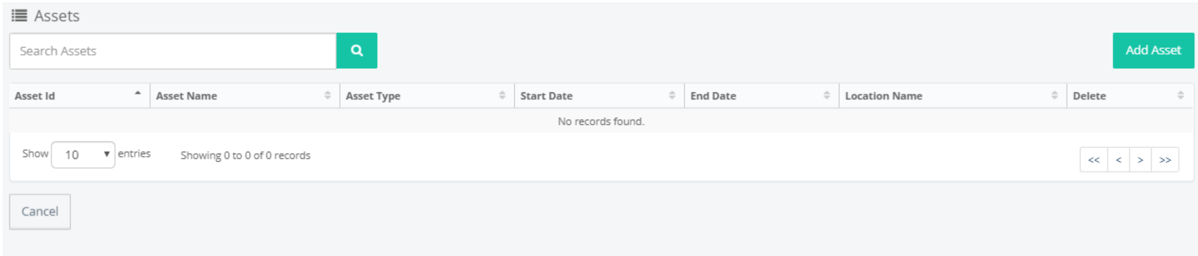


A confirmation message is displayed for the successful upload and a record is added for the uploaded CSV file. Document processing status such as Processed / Failed is displayed with a label under the CSV file name.

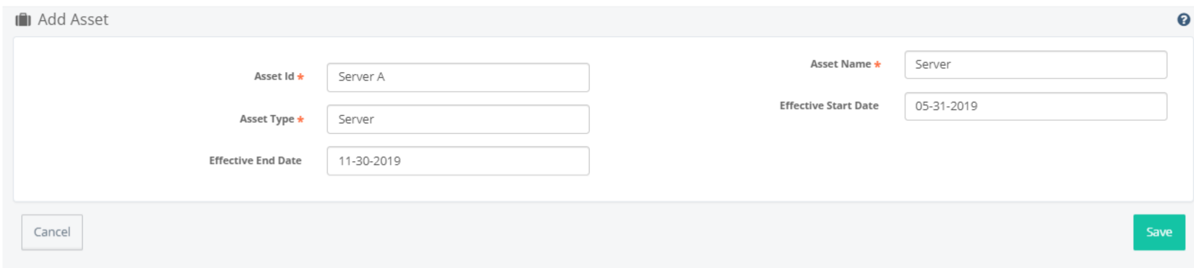


Assets

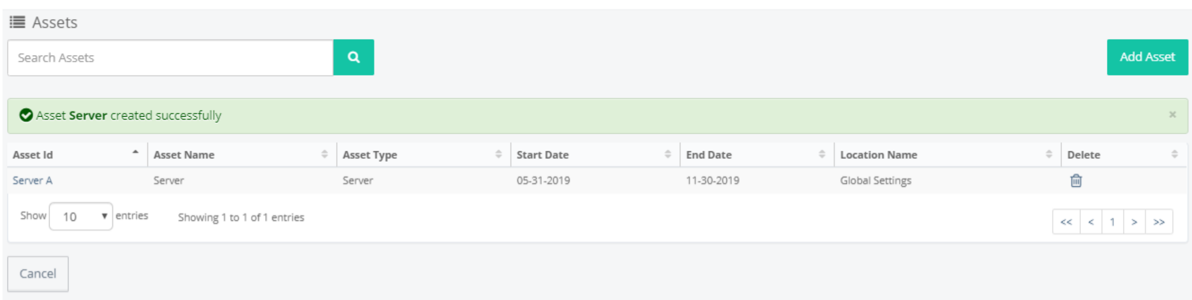
The admin can manage the asset inventory for the organization using the Assets component. The Assets page can be accessed by navigating to Setup -> Assets



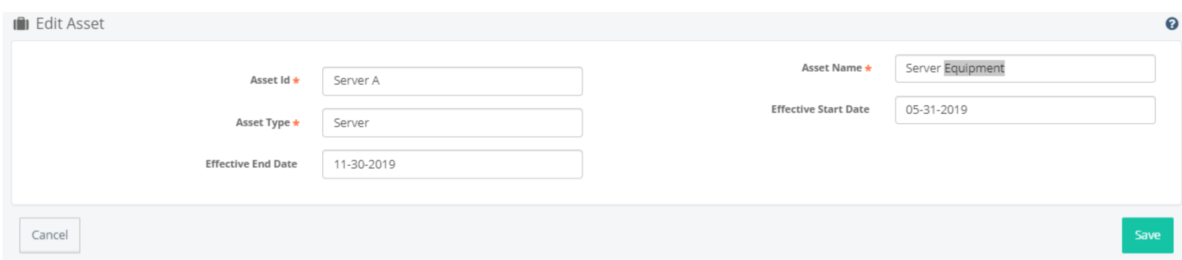
1. To add an asset, click on the Add Asset button. Enter all the details including the Effective Start Date and Effective End date



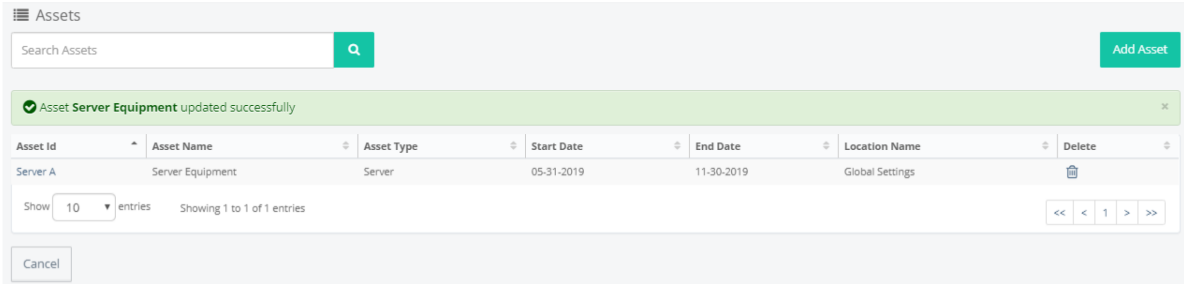
Click on Save



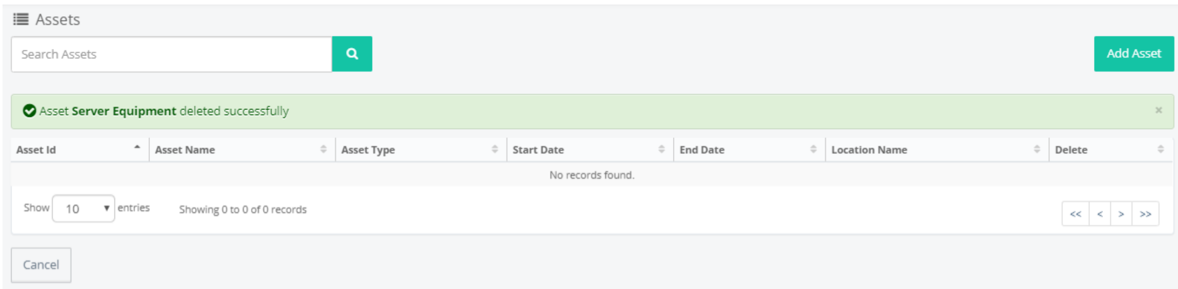
2. To edit the asset information, click on the Asset Id. Make the necessary changes in the Edit Asset page.



Click on Save to view the updated changes

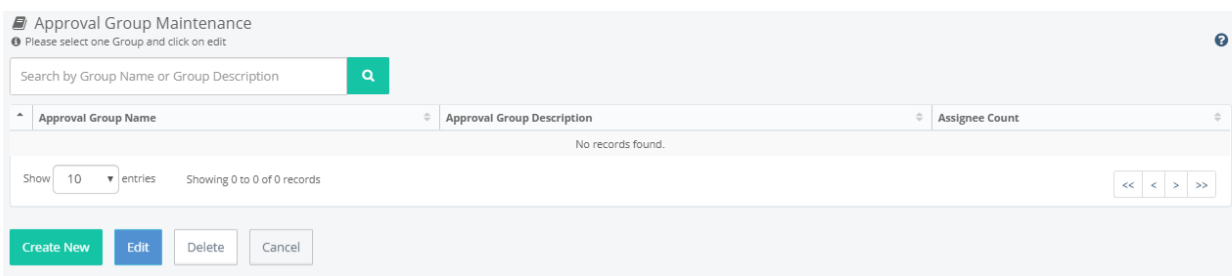


3. To delete the asset, click on the Delete icon in the Delete column for the asset.

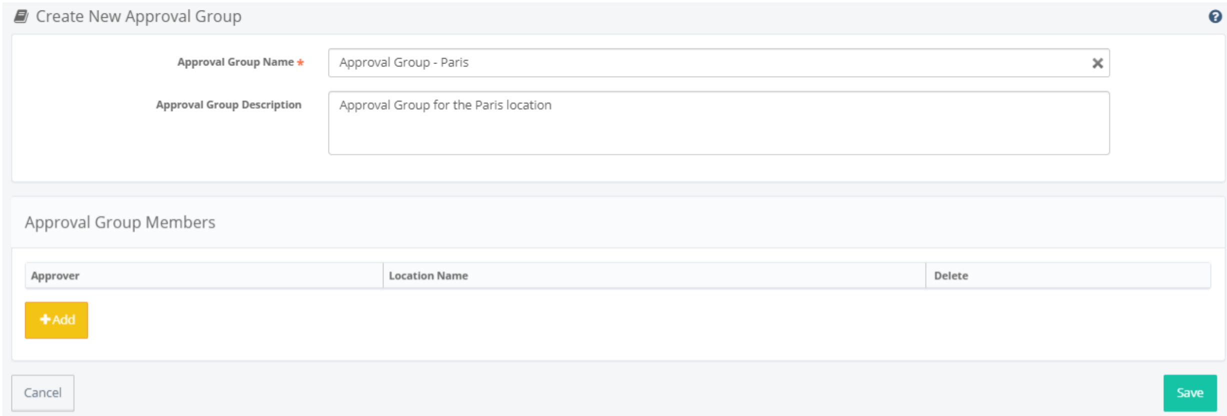


Approval Group

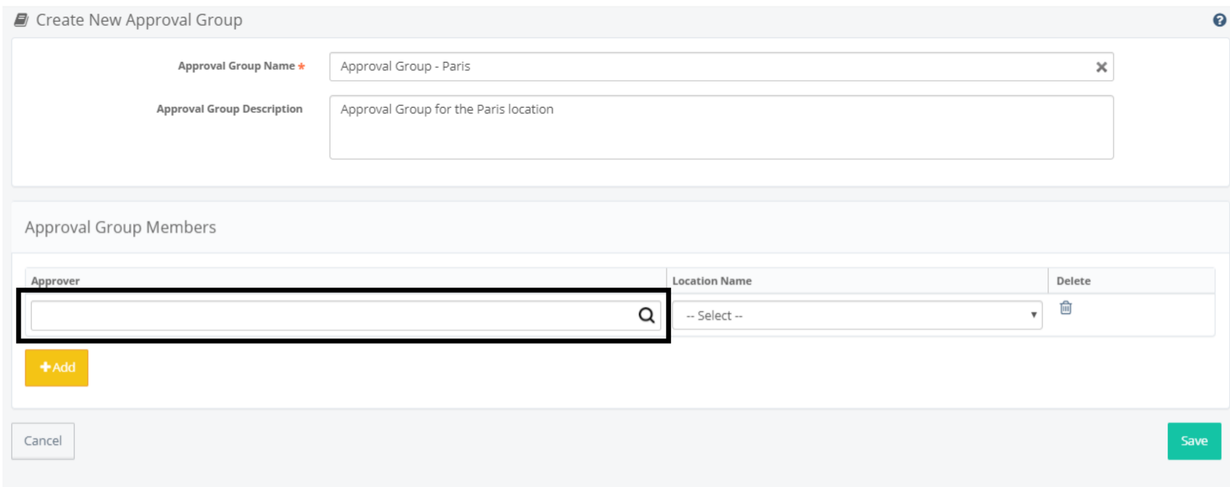
Approval groups are created when the business requires only a certain group of employees to be able to approve / reject visit requests. This can be achieved by adding employees to a group through the Approval Group component. To view the Approval Group Maintenance page, click on Setup -> Approval Group



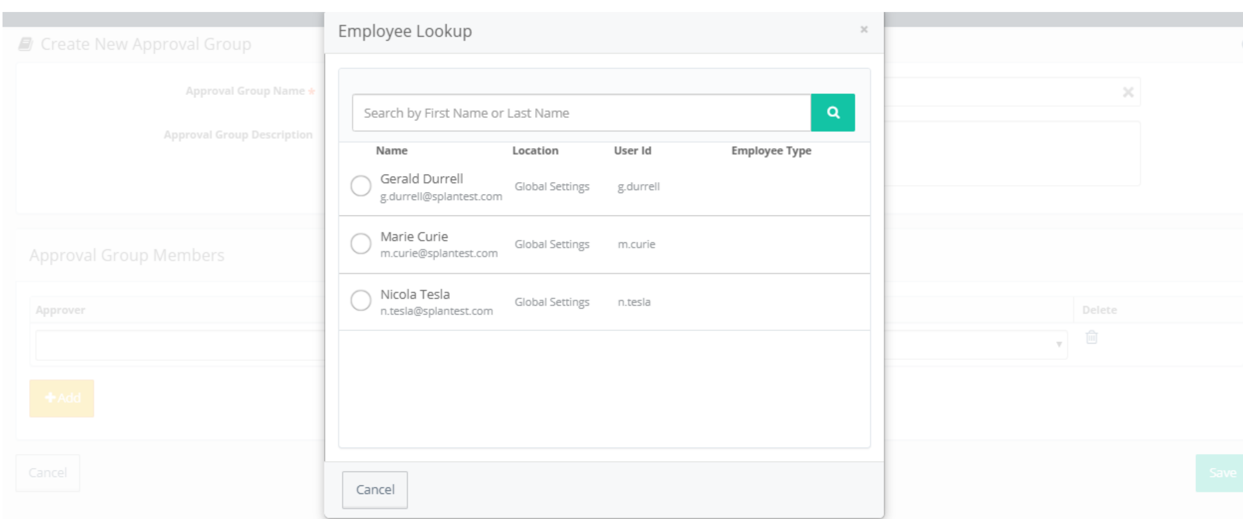
1. Create a new approval group by clicking on the Create New button. In the Create New Approval Group page enter the Approval Group Name and the Approval Group Description



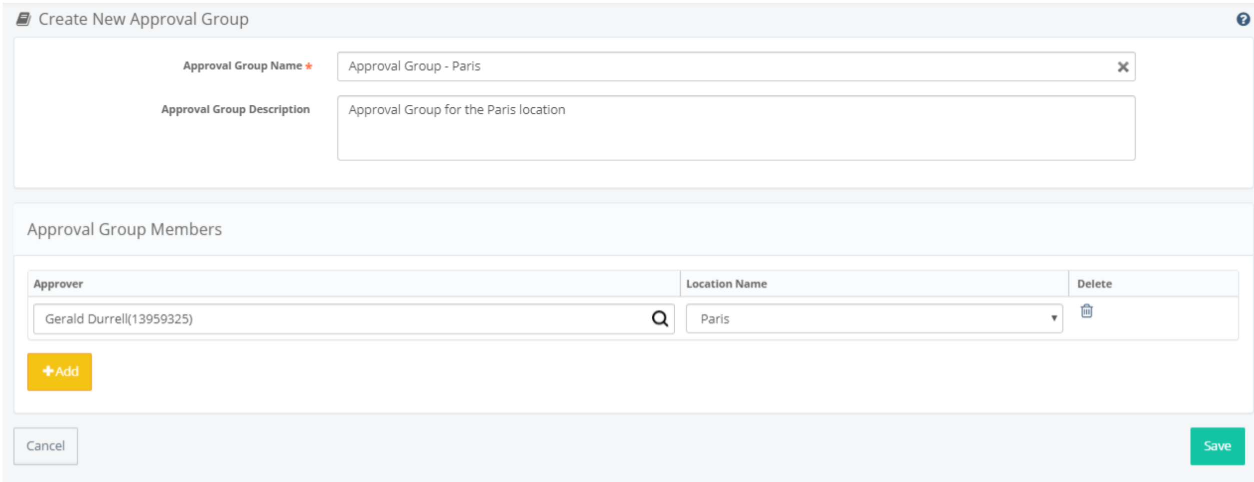
To add an employee to the approval group, click on the +Add button.



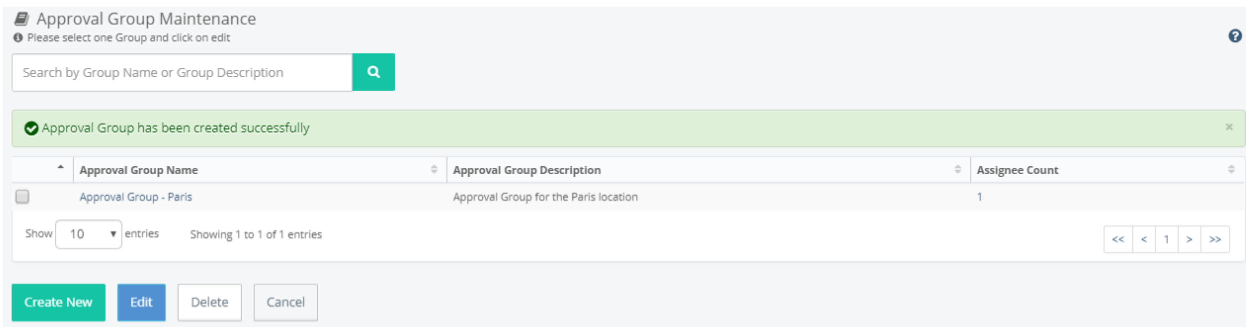
Click on the Approver field. From the Employee Lookup pop-up select the employee to be added.



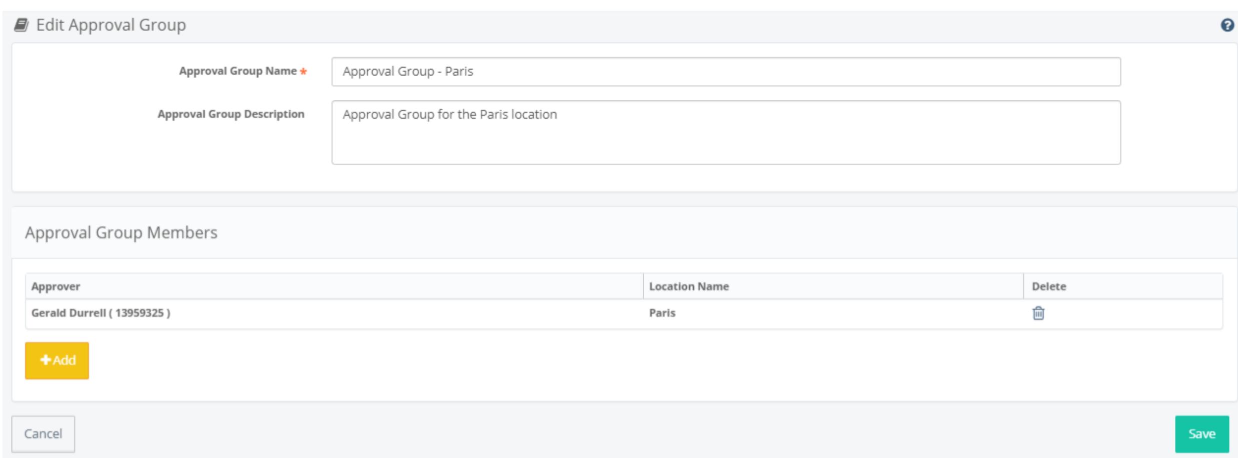
Select the location from the Location Name dropdown.



Click on Save. The approval group is created successfully

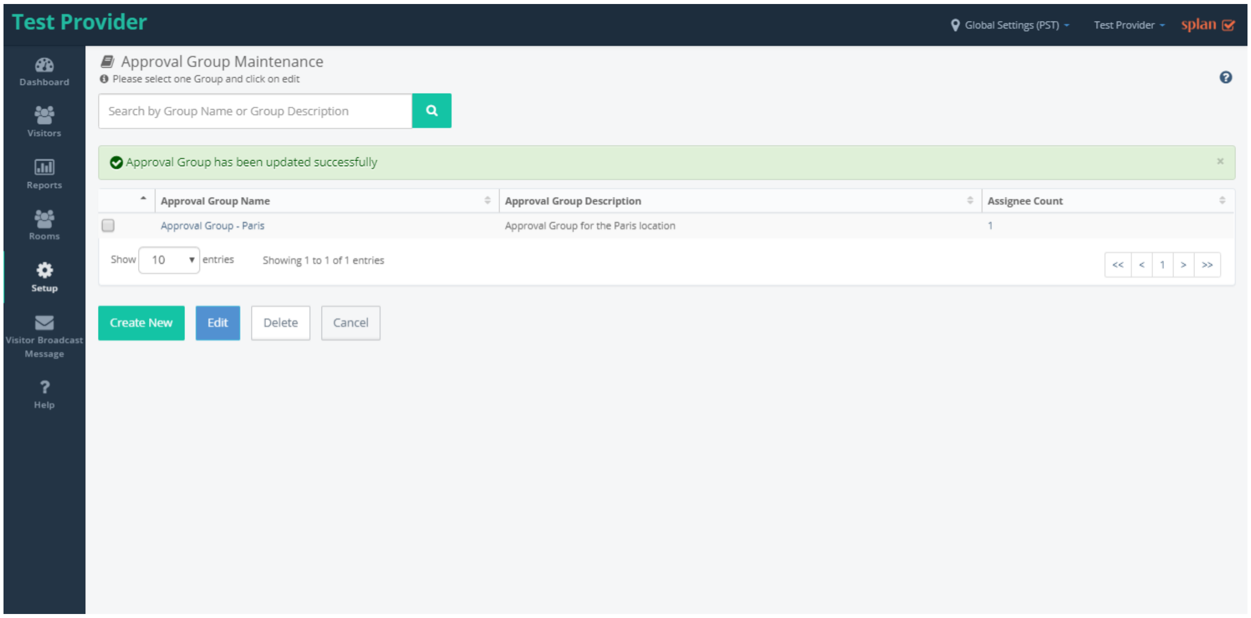


2. To edit the approval group, select the check-box next to the Approval Group Name and click on the Edit button

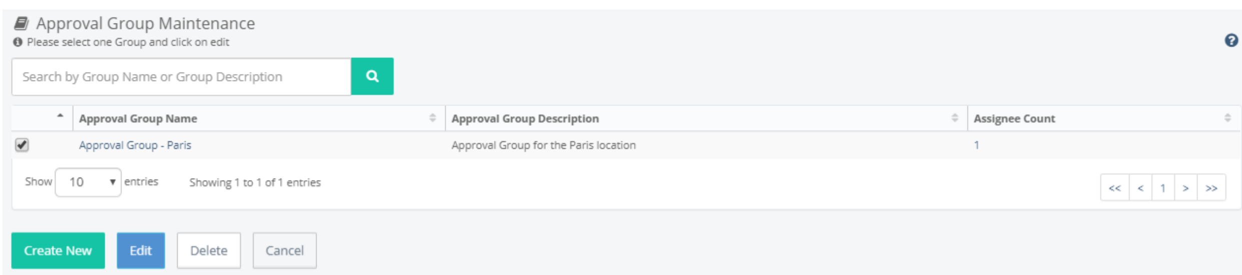


3. In the edit screen, the admin can remove an employee from the approval group by clicking on the Delete icon in the Delete column

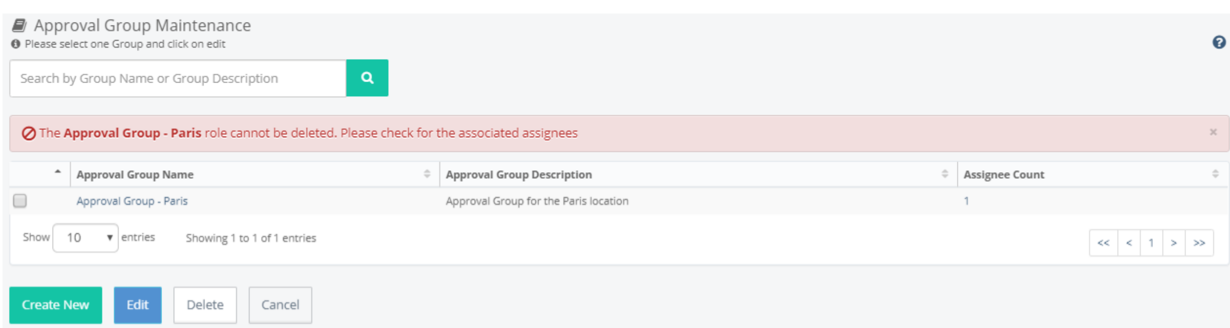
4. Once the required changes are made, click on Save. The approval group changes are updated successfully



6. To delete the approval group select the check-box next to the Approval Group Name and click on the Delete button.



This is successful only when no employees are assigned to the group. When the admin attempts to delete an approval group without removing the assigned employees, an error message is displayed.



Once the employees are unassigned from the approval group, deleting the approval group is successful.