



Visitor Management System

Admin Guide

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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.

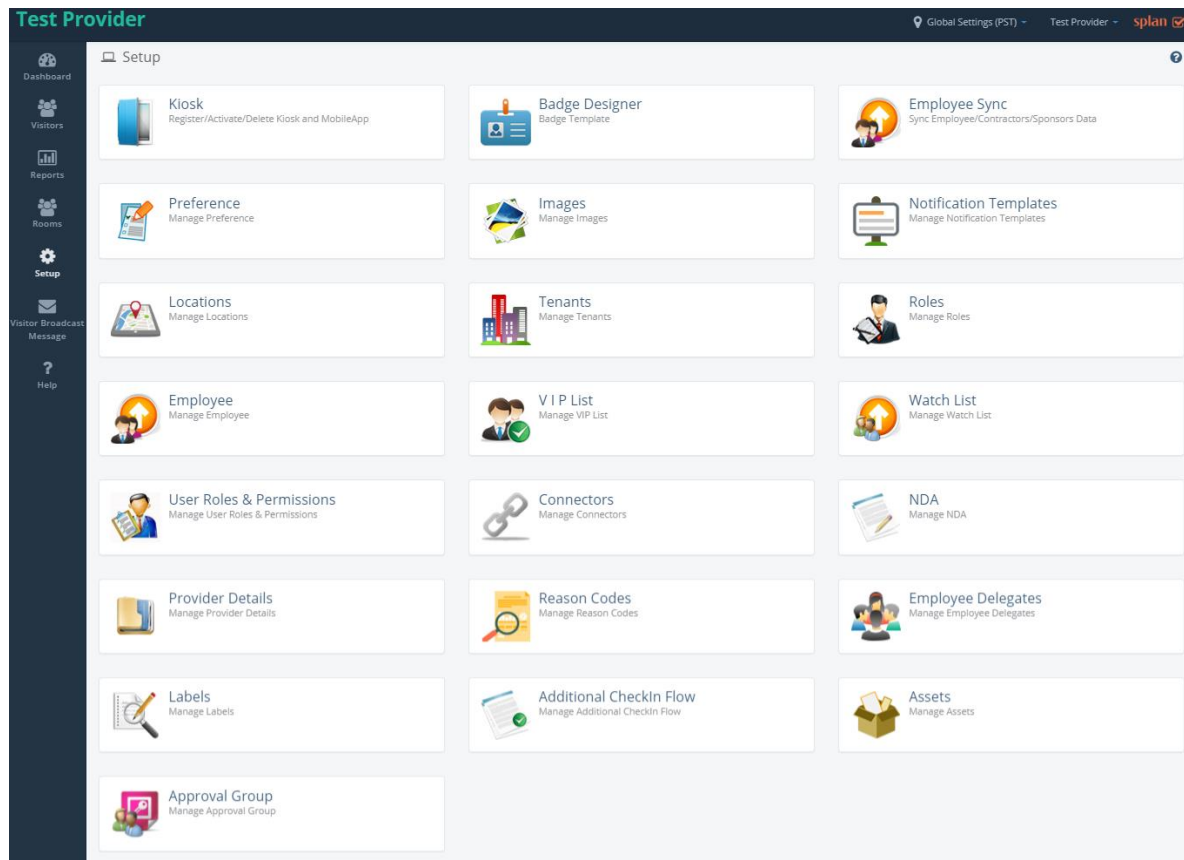
Support

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.

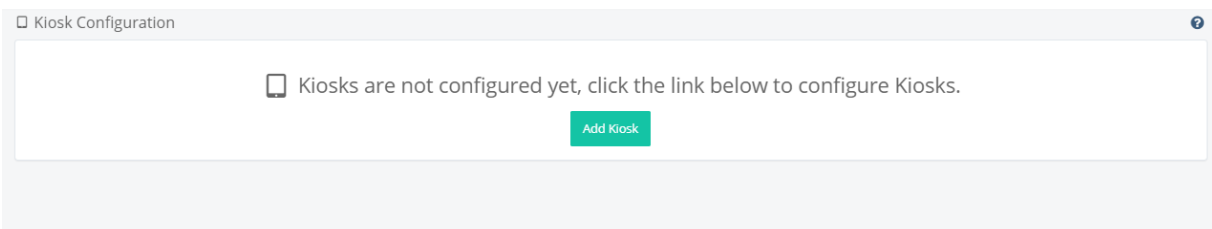
Kiosk Setup Refresh (Last refreshed: 05-23-2019 8:44 PM) ?

[+ Add New Device](#)

Name	Description	Status	Device Type	Registration Code	Created Date	Last Accessed Time	Created By	App Version	Action
Skiosk-stand	Test	Active	Ipad	1409029-131072 Scan QR Code	07-24-2015	05-23-2019 08:45 PM	Toby Jones		Action
Outlook2016	Outlook2016	Active	Outlook 2016	2621446-131072 Scan QR Code	07-08-2016	05-15-2019 09:02 AM	Splan Administrator		Action
Outlook	Outlook	Active	Outlook 2016	2686982-131072 Scan QR Code	07-27-2016	12-24-2018 03:35 PM	Splan Administrator		Action

[Cancel](#)

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

Kiosk Setup Refresh (Last refreshed: 05-23-2019 8:41 PM) + Add New Device

Name	Description	Status	Device Type	Registration Code	Created Date	Last Accessed Time	Created By	App Version	Action
Skiosk-stand	Test	Active	Ipad	1409029-131072 Scan QR Code	07-24-2015	05-07-2019 11:46 PM	Splan Administrator		Action
Outlook2016	Outlook2016	Active	Outlook 2016	2621446-131072 Scan QR Code	07-08-2016	05-15-2019 09:02 AM	Splan Administrator		Action
Outlook	Outlook	Active	Outlook 2016	2686982-131072 Scan QR Code	07-27-2016	12-24-2018 03:35 PM	Splan Administrator		Action

Cancel

Add Device

Device Name *

Device Description *

Device Type

Device Status

Language

Language	Enable	Default	Show Flag
English	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Spanish	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
French	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Japanese	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
German	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Chinese	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Portuguese	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Swedish	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Dutch	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Ukrainian	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Vietnamese	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Hindi	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Arabic	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Hebrew	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Save Cancel

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

Kiosk Setup Refresh (Last refreshed: 05-30-2019 5:09 PM)

Name	Description	Status	Device Type	Registration Code	Created Date	Last Accessed Time	Created By	App Version	Action
SplanKiosk	SplanKiosk	Active	Ipad	7143426-3211265 Scan QR Code	05-30-2019	05-30-2019 05:09 PM	Test Provider		Edit Edit Preferences Delete Unregister Launch Action

Cancel

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

Kiosk Setup Refresh (Last refreshed : 05-30-2019 4:54 PM)

Name	Description	Status	Device Type	Registration Code	Created Date	Last Accessed Time	Created By	App Version	Action
SplanKiosk	SplanKiosk	Active	Ipad	7143425-3211265 Scan QR Code	05-30-2019	05-30-2019 04:56 PM	Test Provider		<ul style="list-style-type: none"> Edit Edit Preferences Delete Unregister Launch

Cancel

Kiosk Setup Refresh (Last refreshed : 05-30-2019 4:54 PM)

✓ The kiosk **SplanKiosk** has been deleted successfully.

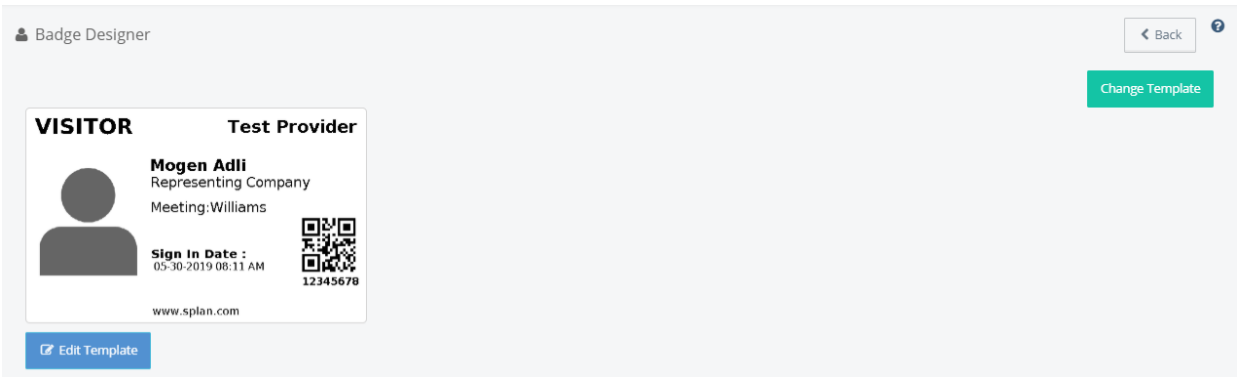
[+ Add New Device](#)

Name	Description	Status	Device Type	Registration Code	Created Date	Last Accessed Time	Created By	App Version	Action

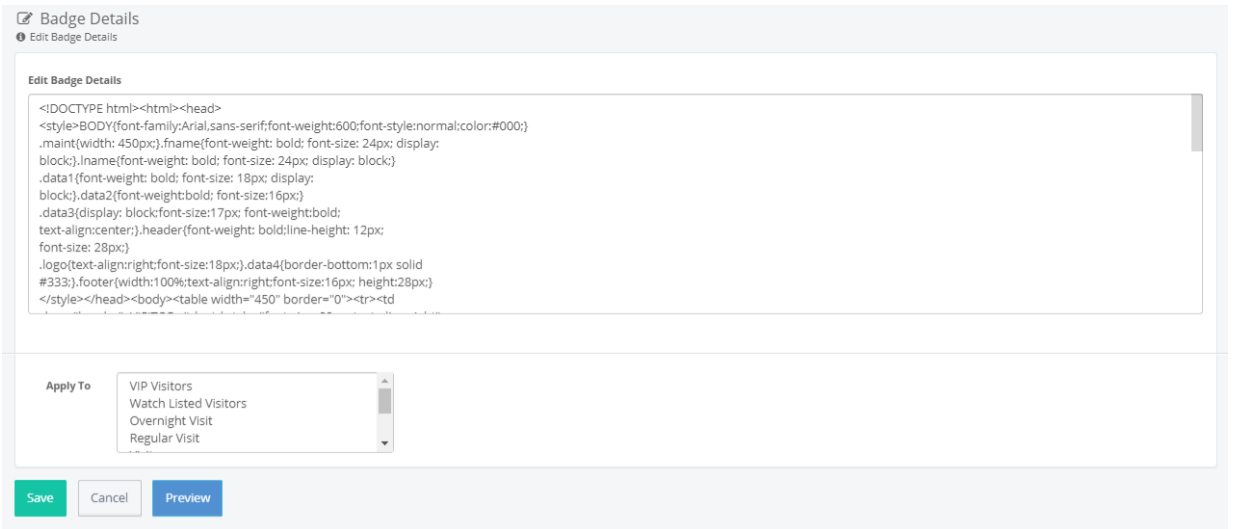
Cancel

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:

Visitor Badge Template

Select a badge and click on Next button

#1

VISITOR Test Provider

 **Mogen Adli**
Representing Company
Meeting:Williams


Sign In Date :
05-30-2019 08:14 AM


12345678

www.splan.com


#2

VISITOR Test Provider

 **Mogen Adli**

Host : Williams

Signed In :
05-30-2019 08:14 AM
Reg# 12345678



#3

VISITOR Test Provider

 **Mogen Adli**
Representing Company
Meeting:Williams

Sign In Date :
30/05/2019
08:14 AM


12345678

www.splan.com

#4

VISITOR

Mogen Adli
Representing Company
Meeting: Williams
Test Provider

Sign In Date: 05-30-2019 08:14 AM

www.splan.com

#5

VISITOR

Mogen Adli
Representing Company
Meeting:Williams


12345678

Test Provider

Sign In Date: 05-30-2019 08:14 AM

www.splan.com

#6

VISITOR Test Provider

Mogen Adli
Meeting:Williams


12345678

Sign In Date: 05-30-2019 08:14 AM

www.splan.com

#7

Mogen Adli
Williams


12345678

Valid Through:
05-30-2019 08:14 AM

#8

VISITOR

Person Name:
Mogen Adli
Representing Company:
Representing Company
Meeting:Williams

 
12345678

www.splan.com

#9

Test Provider
Welcomes

Mogen Adli
Representing Company

#10


Test Provider
Welcomes


Mogen Adli
Representing Company


12345678

#11

VISITOR Test Provider

 **Mogen Adli**
Meeting:Williams
Sign In Date:
05-30-2019


12345678

www.splan.com

Cancel

Next

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.

Visitor Badge Template
Select a badge and click on Next button

#1
VISITOR Test Provider
Mogen Adli
Representing Company
Meeting:Williams
Sign In Date : 05-30-2019 08:14 AM
12345678
www.splan.com

#2
VISITOR Test Provider
Mogen Adli
Host : Williams
Signed in : 05-30-2019 08:14 AM
Reg# 12345678
www.splan.com

#3
VISITOR Test Provider
Mogen Adli
Representing Company
Meeting:Williams
Sign In Date : 30/05/2019 08:14 AM
12345678
www.splan.com

#4
VISITOR
Mogen Adli
Representing Company
Meeting: Williams
Test Provider
Sign In Date: 05-30-2019 08:14 AM
www.splan.com

#5
VISITOR
Mogen Adli
Representing Company
Meeting:Williams
12345678
Test Provider
Sign In Date: 05-30-2019 08:14 AM
www.splan.com

#6
VISITOR Test Provider
Mogen Adli
Meeting:Williams
12345678
Sign In Date: 05-30-2019 08:14 AM
www.splan.com

#7
Mogen Adli
Williams
12345678
Valid Through:
05-30-2019 08:14 AM

#8
VISITOR
Person Name:
Mogen Adli
Representing Company:
Representing Company
Meeting:Williams
12345678
www.splan.com

#9
Test Provider
Welcomes
Mogen Adli
Representing Company

#10
Test Provider
Welcomes
Mogen Adli
Representing Company
12345678

#11
VISITOR Test Provider
Mogen Adli
Meeting:Williams
Sign In Date: 05-30-2019
12345678
www.splan.com

Cancel

Next

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.

Badge Details

Add the badge details

VISITOR

Test Provider



Mogen Adli

Host : Williams

**Signed In :
05-30-2019 08:14
AM**

Reg# 12345678



Apply To

VIP Visitors
Watch Listed Visitors
Overnight Visit
Regular Visit

Save

Cancel

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.

Preferences
Manage System defaults, preferences and settings of the Kiosk

Search by Parameter Name or Description or Type All

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	<input checked="" type="checkbox"/>	View/Edit
Watch List Enabled?	Watch List Enabled?	True	<input type="checkbox"/>	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.

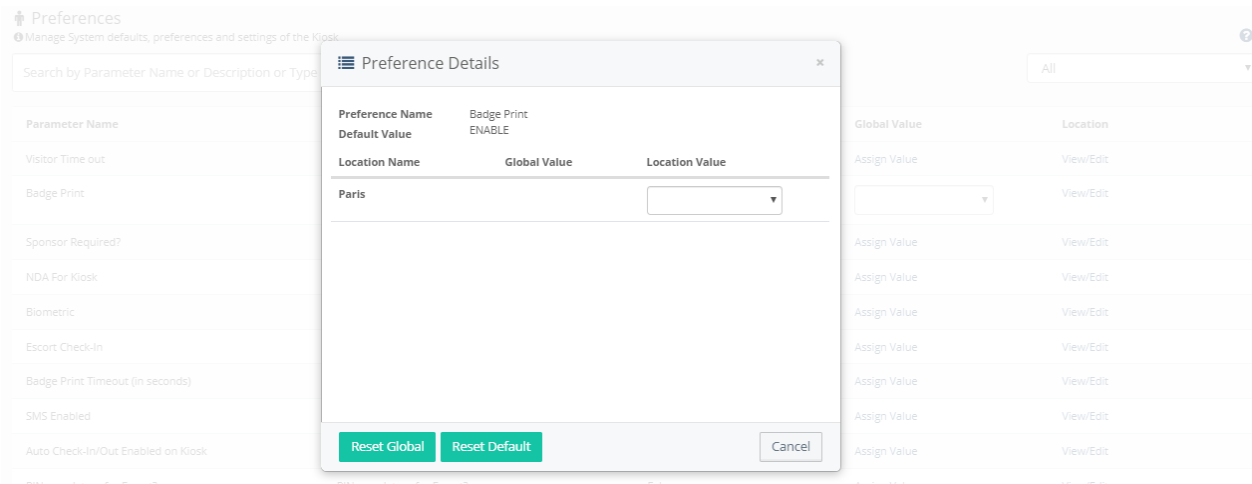
2. Click on 'Assign Value' under the Global Value column to change a preference at the Global level. This value then overrides the default value and gets carried over to the location level as well.

Preferences
Manage System defaults, preferences and settings of the Kiosk

Search by Parameter Name or Description or Type All

Parameter Name	Description	Default Value	Global Value	Location
Visitor Time out	Visitor Time out	30	Assign Value	View/Edit
Badge Print	Badge Print	ENABLE	<input type="text"/>	View/Edit

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

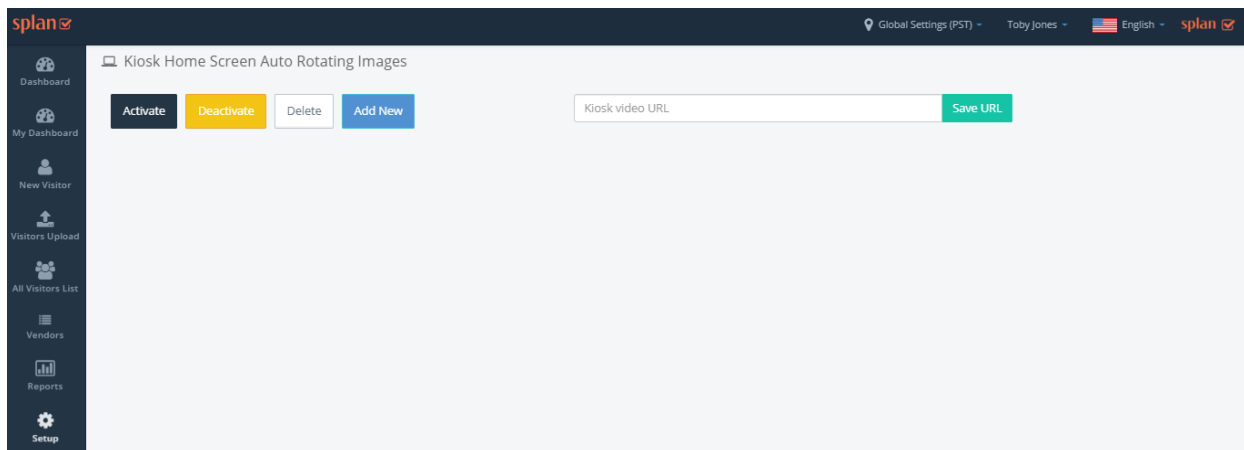


4. A pop-up is displayed with the list of locations and fields corresponding to each location.

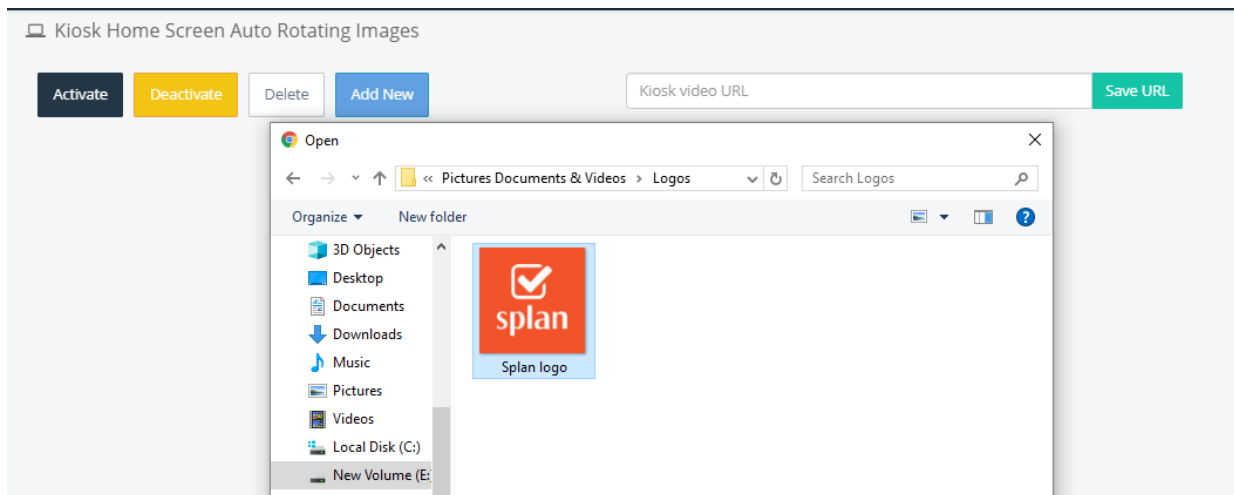
Images

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

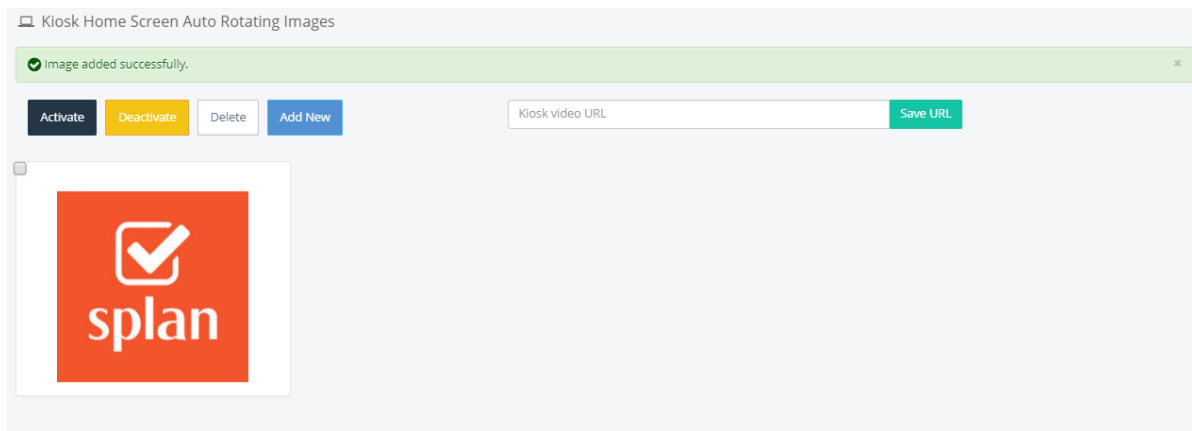
The admin can activate/ deactivate/ add new/ delete kiosk images. Video files (.mp4) can also be uploaded along with images. A video URL can also be provided.



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.



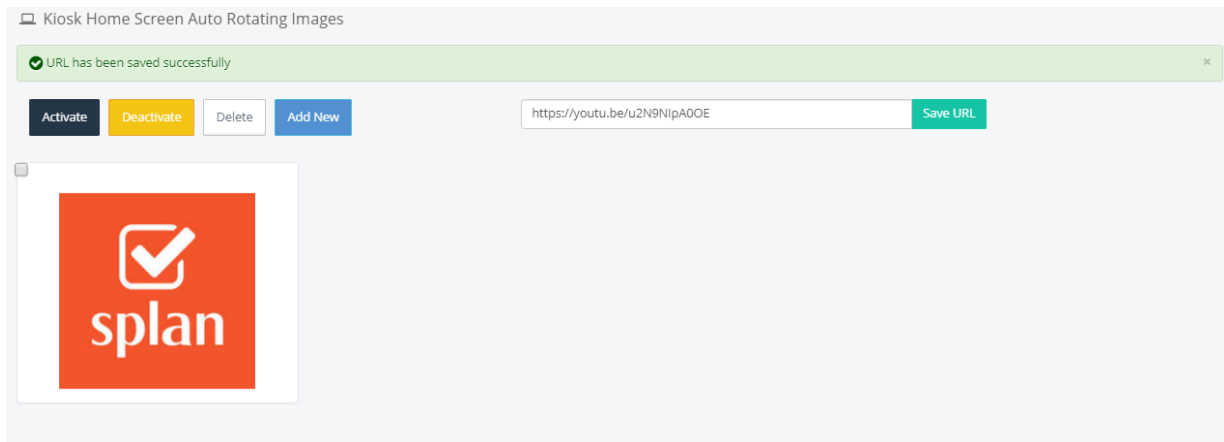
3. Use this checkbox to select the image and perform the following activities:

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

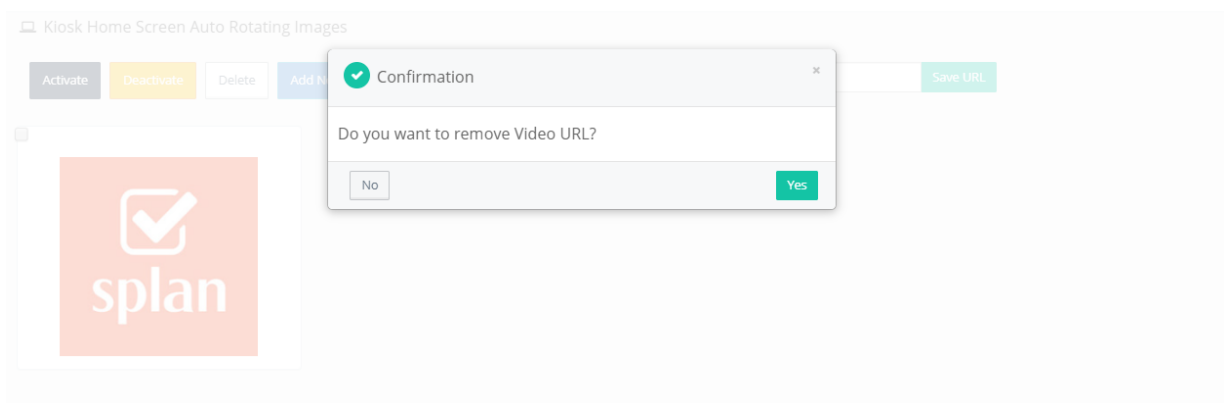
B) Activate: Select a deactivated image/video and click on Activate to activate the image/video again

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

From Email

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

Show entries Showing 1 to 10 of 16 entries

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.

The screenshot shows the 'Add Notification Template' interface. The form is pre-filled with the following information:

- Template Name:** Check-In Notification
- Use This Template For:** After Visitor Checkin
- Template Type:** Email
- Content Type:** HTML
- Description:** Description
- Apply To:** Other Visitors, Watch Listed Visitors, VIP Visitors
- From Email:** donot-reply@splan.com
- Subject:** Check-In Notification
- Message Text:** A rich text editor containing the following text:
Hi {MEMBER_ID.FIRSTNAME} {MEMBER_ID.LASTNAME}
You are successfully checked-in and your host, {SPONSOR_ID.FIRSTNAME} {SPONSOR_ID.LASTNAME} has been notified about your arrival.
APPOINTMENT DETAILS :
Host : {SPONSOR_ID.FIRSTNAME} {SPONSOR_ID.LASTNAME},

Recipient selection options:

- To Recipients:** Visitor, Other, Requester, Sponsor, Vendor Coordinator
- CC Recipients:** Visitor, Other, Requester, Sponsor, Vendor Coordinator
- BCC Recipients:** Visitor, Other, Requester, Sponsor, Vendor Coordinator

Additional options at the bottom:

- Status:** Active
- Send Signed NDA?:** No
- Send ics?:** No

Buttons: Save, Cancel

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.

create new role
Please create new role And Assign Privileges

Role Name * Tenant Employee

Role Description Tenant Employee

Default Role

Privileges

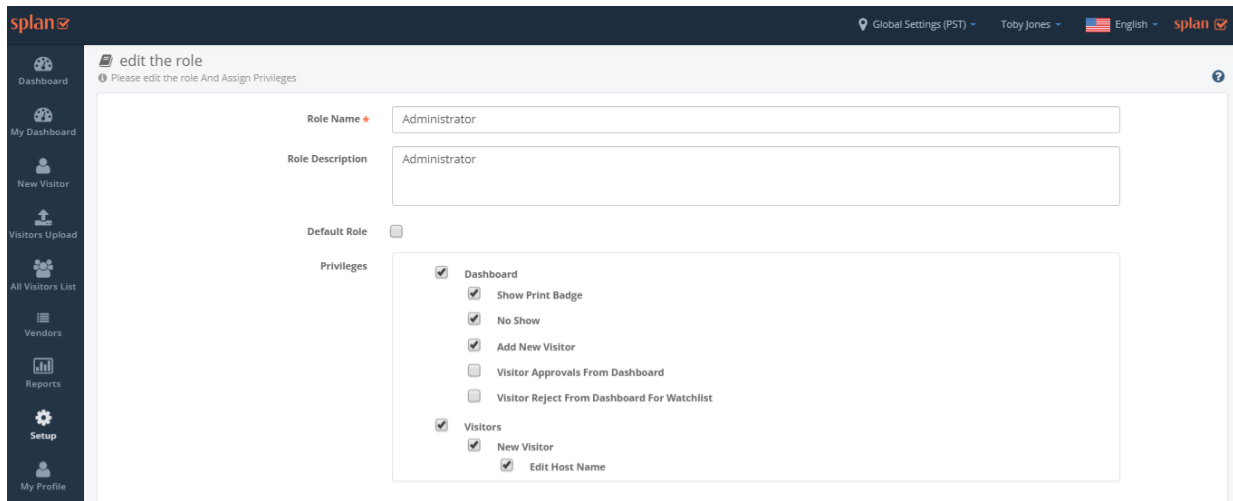
- Dashboard
 - Show Print Badge
 - No Show
 - Add New Visitor
 - Visitor Approvals From Dashboard
 - Visitor Reject From Dashboard For Watchlist
- Visitors
 - New Visitor
 - Edit Host Name

Cancel Save

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.

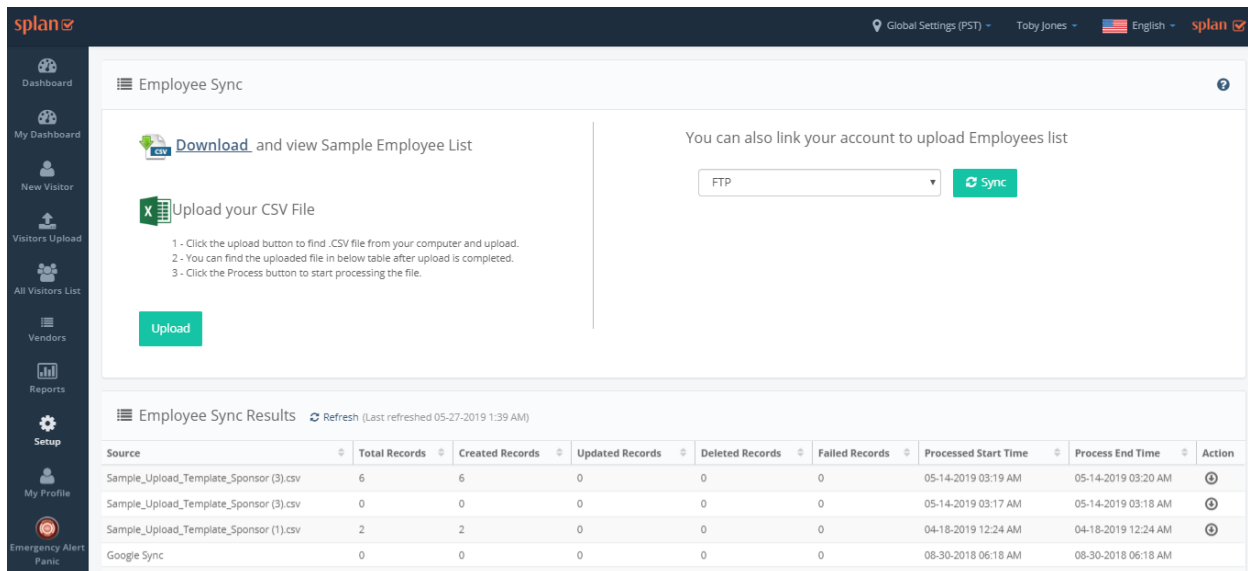
4. In order to edit a role, select the role and click on Edit. The admin can also click on the Role Name to access the Edit The Role page. Make the necessary changes here and click on Save. The role is updated successfully.



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:

The screenshot shows the 'Employee Sync' page in the splan application. At the top, there's a navigation bar with 'Global Settings (PST)', 'Toby Jones', 'English', and the splan logo. A sidebar on the left contains various navigation options like 'Dashboard', 'My Dashboard', 'New Visitor', 'Visitors Upload', 'All Visitors List', 'Vendors', 'Reports', 'Setup', 'My Profile', 'Emergency Alert Panic', and 'Visitor Broadcast Message'. The main content area is titled 'Employee Sync' and includes instructions for uploading a CSV file and a 'Sync' button. A green success message states: 'Successfully uploaded the file Sample_Upload_Template_Sponsor (5).csv'. Below this is a table titled 'Employee Sync Results' with a refresh button and a timestamp 'Last refreshed 05-27-2019 1:52 AM'. The table has columns for Source, Total Records, Created Records, Updated Records, Deleted Records, Failed Records, Processed Start Time, Process End Time, and Action. The data rows show various CSV files and Google Sync entries with their respective record counts and timestamps. At the bottom of the table, there's a 'Show 10 entries' dropdown and a 'Showing 1 to 10 of 15 entries' indicator. A 'Cancel' button is located at the bottom left of the table area.

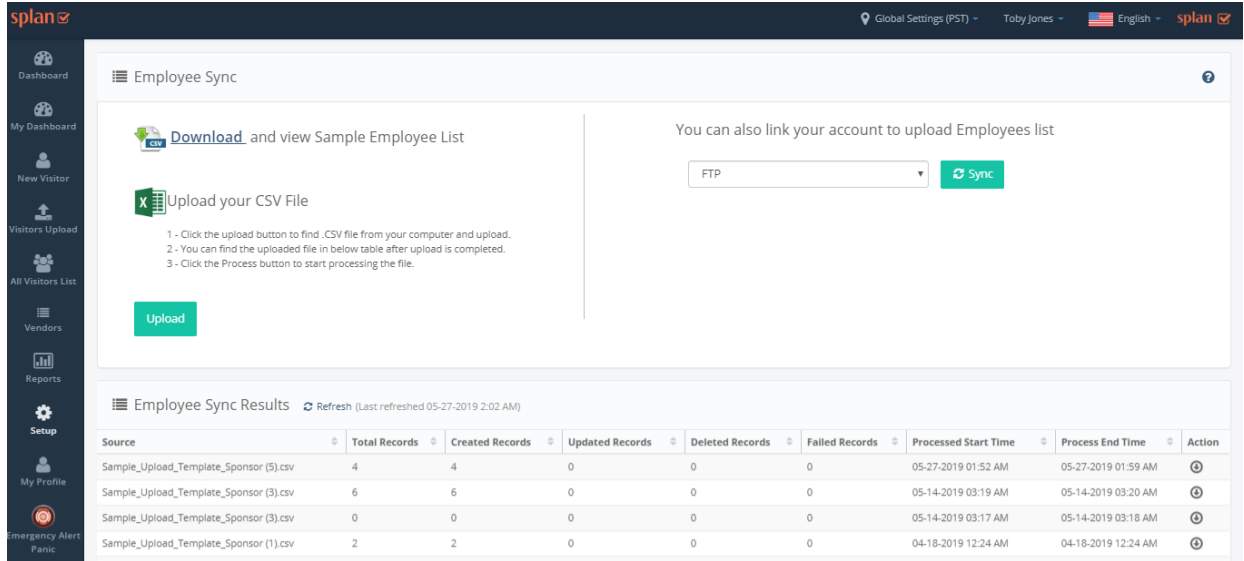
Source	Total Records	Created Records	Updated Records	Deleted Records	Failed Records	Processed Start Time	Process End Time	Action
Sample_Upload_Template_Sponsor (5).csv	0				0	05-27-2019 01:52 AM		Action ▾
Sample_Upload_Template_Sponsor (3).csv	6	6	0	0	0	05-14-2019 03:19 AM	05-14-2019 03:20 AM	🕒
Sample_Upload_Template_Sponsor (3).csv	0	0	0	0	0	05-14-2019 03:17 AM	05-14-2019 03:18 AM	🕒
Sample_Upload_Template_Sponsor (1).csv	2	2	0	0	0	04-18-2019 12:24 AM	04-18-2019 12:24 AM	🕒
Google Sync	0	0	0	0	0	08-30-2018 06:18 AM	08-30-2018 06:18 AM	
Google Sync	0	0	0	0	0	08-30-2018 06:16 AM	08-30-2018 06:16 AM	
Google Sync	0	0	0	0	0	08-30-2018 06:15 AM	08-30-2018 06:15 AM	
Google Sync	0	0	0	0	0	08-30-2018 06:08 AM	08-30-2018 06:08 AM	
Google Sync	0	0	0	0	0	08-30-2018 06:06 AM	08-30-2018 06:06 AM	
Google Sync	0	0	0	0	0	08-30-2018 06:00 AM	08-30-2018 06:00 AM	

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.

This screenshot shows the 'Employee Sync' page after the processing step. The success message has changed to: 'Document processing has started. Please check the status after some time.' The 'Employee Sync Results' table now shows a refresh button and a timestamp 'Last refreshed 05-27-2019 1:59 AM'. The data rows are updated, showing that the 'Sample_Upload_Template_Sponsor (3).csv' files now have 6 updated records. The 'Action' column for these rows now shows a clock icon, indicating they are being processed.

Source	Total Records	Created Records	Updated Records	Deleted Records	Failed Records	Processed Start Time	Process End Time	Action
Sample_Upload_Template_Sponsor (5).csv	0				0	05-27-2019 01:52 AM		
Sample_Upload_Template_Sponsor (3).csv	6	6	0	0	0	05-14-2019 03:19 AM	05-14-2019 03:20 AM	🕒
Sample_Upload_Template_Sponsor (3).csv	0	0	0	0	0	05-14-2019 03:17 AM	05-14-2019 03:18 AM	🕒

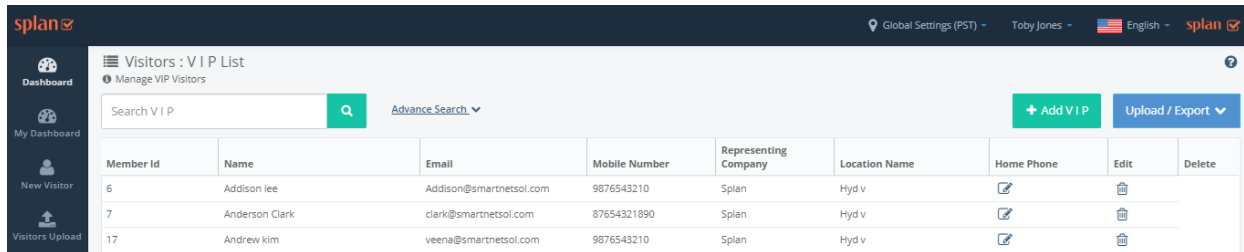
6. Once processing is completed, the record is updated with the total number of records processed and the number of employee profiles that were created, updated, deleted or failed as part of this sync process



VIP List

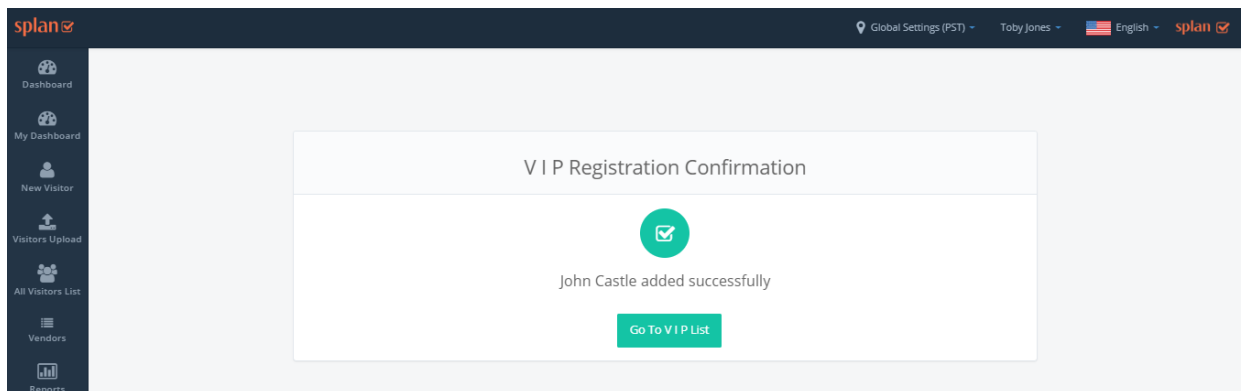
The VIP List component allows for pro-active management of VIP visitors who are visiting the premises. The component can be accessed by navigating to Setup -> VIP List.

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

Upload VIP Visitors

[Download Template](#)

Upload your CSV File Upload

1 - Click the upload button to find .CSV file from your computer and upload.
 2 - You can find the uploaded file in below table after upload is completed.
 3 - Click the Process button to start processing the file.

Successfully uploaded the file **Sample_Upload_Template_VIP.csv**

VIP Upload List
 Click on Download to download the log file

Search templates Refresh (Last refreshed : 05-27-2019 2:51 AM)

ID	Document Name	Status	Uploaded By	Uploaded Date / Time	Processed By	Processed Date / Time	Process	Action
6750208	Sample_Upload_Template_VIP.csv	Pending	Splan Administrator	05-27-2019 02:51 AM			Process	✕

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

Visitors : V I P List
 Manage VIP Visitors

Search V I P Advance Search + Add V I P Upload / Export

Member Id	Name	Email	Mobile Number	Representing Company	Location Name	Edit	Upload Export
							Upload Export

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

splan Global Settings (PST) Toby Jones English splan

Visitors : Watch List
 Manage Watch List Visitors

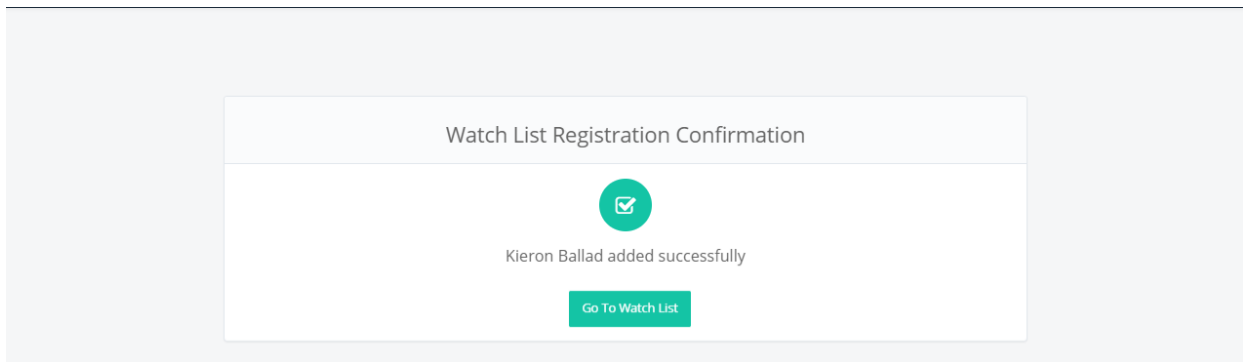
Search Watch List Advance Search + Add Watch List Upload / Export

Member Id	Name	Email	Mobile Number	Representing Company	Location Name	Edit	Delete
5	Vinson Matthew	Vinson@smartsnetSol.com	4321567890	Splan	Hyd v	✎	🗑

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

Member Id	Name	Email	Mobile Number	Representing Company	Location Name	Edit	Delete
655365	Kieron Ballad	k.ballad@splantest.com	9786768767		Global Settings		

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

Profile

✓ Kieron Ballard updated successfully

First Name * Kieron

Last Name * Ballard

Email k.ballad@splantest.com

Mobile Number 9786768767

Gender Male

Height 5,9

Weight 70

Ethnicity Ethnicity

Date Effective mm-dd-yyyy

Hair Color Hair Color

Build Build

Country -- Select --

First Name Alias First Name Alias

Last Name Alias Last Name Alias

Representing Company Representing Company

Comments Comments

Access Level Allow Visit

Reason / Action OBSERVE AND REPORT

Addl Description Addl Description

Requestor Requestor

Instructions Instructions

Eye Color Eye Color

Home Phone Home Phone

Save Cancel

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

Visitors : Watch List

Manage Watch List Visitors

Search Watch List

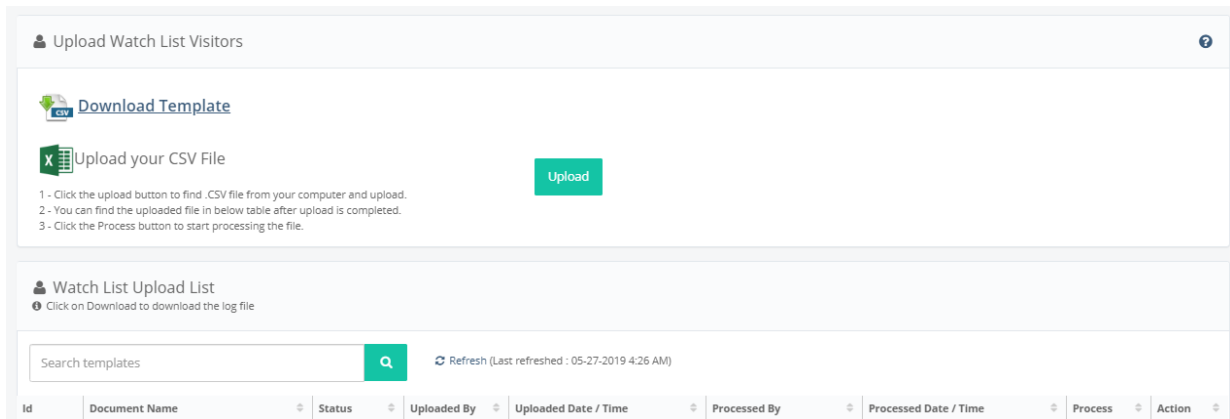
Advance Search

+ Add Watch List

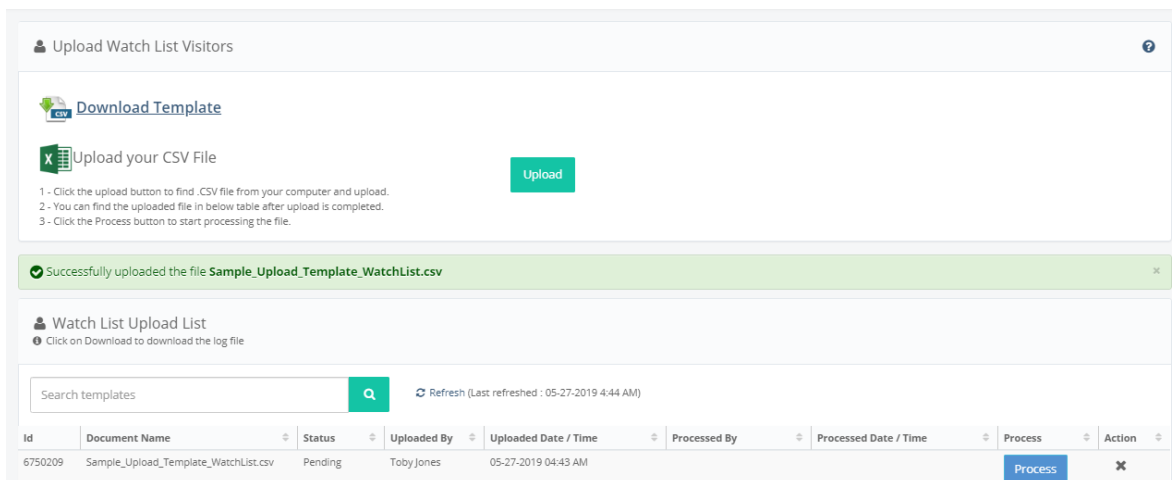
Upload / Export

Member Id	Name	Email	Mobile Number	Representing Company	Location Name	Edit	Upload Export
-----------	------	-------	---------------	----------------------	---------------	------	---------------

- 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.

Upload Watch List Visitors

[Download Template](#)

Upload your CSV File Upload

1 - Click the upload button to find .CSV file from your computer and upload.
 2 - You can find the uploaded file in below table after upload is completed.
 3 - Click the Process button to start processing the file.

✔ Document processing has started. Please check the status after some time. ✕

Watch List Upload List
 Click on Download to download the log file

Search templates Q Refresh (Last refreshed : 05-27-2019 4:47 AM)

Id	Document Name	Status	Uploaded By	Uploaded Date / Time	Processed By	Processed Date / Time	Process	Action
6750209	Sample_Upload_Template_WatchList.csv	Success: 2 Failed: 0	Toby Jones	05-27-2019 04:43 AM	Toby Jones	05-27-2019 04:47 AM		Q

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.

Visitors : Watch List
 Manage Watch List Visitors

Search Watch List Q Advance Search ▾ + Add Watch List Upload / Export ▾

Member Id	Name	Email	Mobile Number	Representing Company	Location Name	Edit	Upload Export

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.

User Roles And Location Details
 Select User Role Assign To Location

Search User name Role Location Q

User name	Role	Location
Gerald Durrell (13959325)	Lobby Ambassador	Paris

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

Create New Edit Clone Delete Cancel

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

Create New User Role
Please choose User Name, Role, Locations and Create User Role

User name *

Role Administrator

Selected Locations Global Settings

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.

Create New User Role
Please choose User Name, Role, Locations and Create User Role

Users Lookup
Please choose a user to go forward

Search

<input type="radio"/>	Albert Einstein	a.einstein@splantest.com	a.einstein
<input type="radio"/>	Gerald Durrell	g.durrell@splantest.com	g.durrell
<input type="radio"/>	Marie Curie	m.curie@splantest.com	m.curie

Create New User Role
Please choose User Name, Role, Locations and Create User Role

User name * Marie Curie (13959327)

Role Administrator

Selected Locations Global Settings

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

The screenshot shows a web interface titled "Update Provider Locations for Marie Curie (13959327) - Administrator". Below the title is a search bar labeled "Search Location" with a magnifying glass icon. Underneath is a table with a header "Location Name" and a sub-header "Allowed". The table contains two rows: "Global Settings" with an unchecked checkbox, and "Paris" with a checked checkbox. Below the table, it says "Showing 1 to 2 of 2 entries". At the bottom, there are "Update" and "Cancel" buttons.

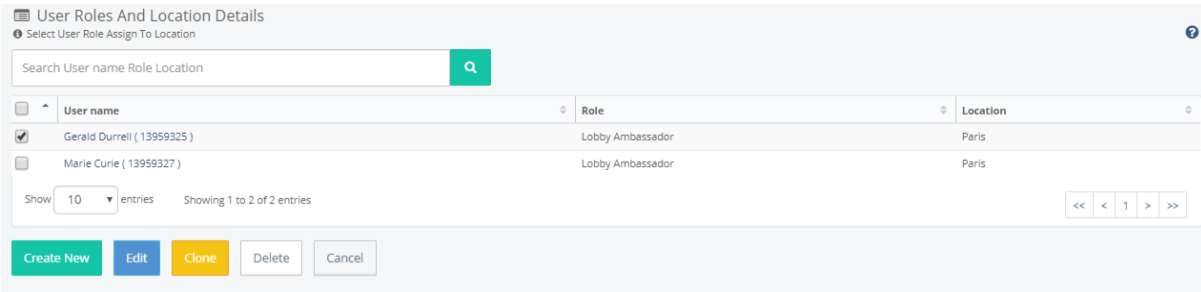
Now select the desired role from the Role dropdown and click on Save.

The screenshot shows a web interface titled "Create New User Role". Below the title is a search bar labeled "Search User name Role Location". The form contains three fields: "User name" with the value "Marie Curie (13959327)", "Role" with a dropdown menu showing "Lobby Ambassador", and "Selected Locations" with a list box containing "Paris". An "Add" button is next to the list box. At the bottom, there are "Save" and "Cancel" buttons.

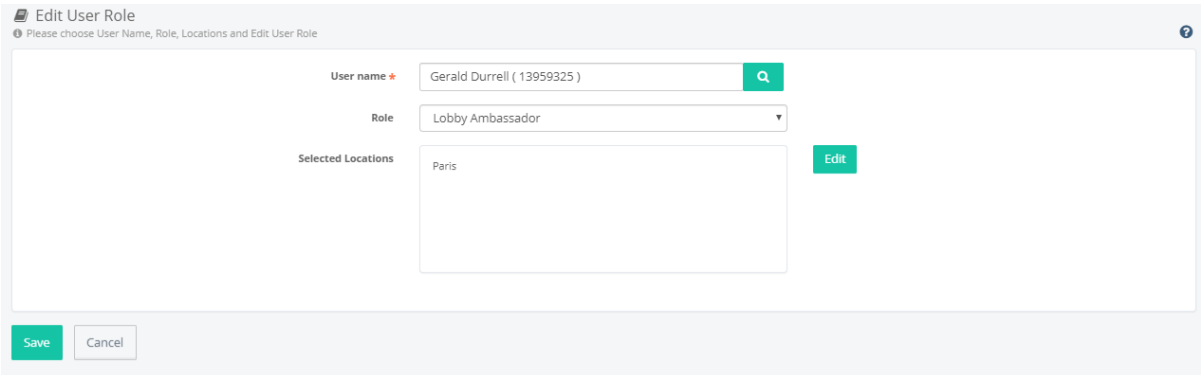
The employee is now assigned with the selected role to the required location

The screenshot shows a web interface titled "User Roles And Location Details". Below the title is a search bar labeled "Search User name Role Location". A green notification banner at the top says "The role Lobby Ambassador is assigned to Marie Curie (13959327) in Paris location successfully". Below the banner is a table with columns "User name", "Role", and "Location". The table contains two rows: "Gerald Durrell (13959325)" with role "Lobby Ambassador" and location "Paris", and "Marie Curie (13959327)" with role "Lobby Ambassador" and location "Paris". Below the table, it says "Showing 1 to 2 of 2 entries". At the bottom, there are "Create New", "Edit", "Clone", "Delete", and "Cancel" buttons.

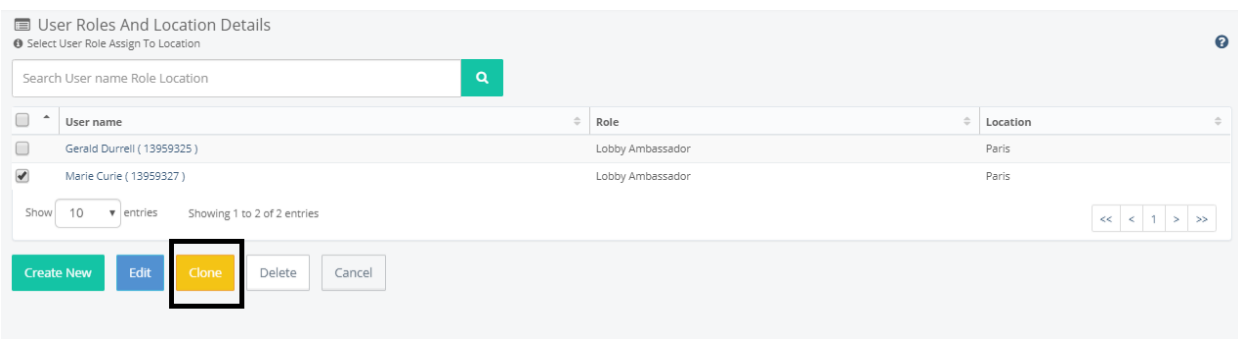
2. Edit a user role by selecting the checkbox next to the user name and clicking on the edit button. The admin can access the Edit User Role page by clicking on the User Name itself.



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.



Create New User Role
Please choose User Name, Role, Locations and Create User Role

User name * Marie Curie (13959327)

Role Lobby Ambassador

Selected Locations Paris

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.

Locations

Search provider location

Provider Location Id	Location Name	Assigned Campus	Status	Display Sequence	Delete
3211264	Global Settings		Active	1	<input type="button" value="Delete"/>
3211265	Paris		Active	2	<input type="button" value="Delete"/>

Show 10 entries Showing 1 to 2 of 2 entries

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

Add Provider Location

Location Name *
Address Line 1

Display Name *
Address Line 2

Display Sequence
City
State

Primary Contact
Primary Email
Primary Phone

Secondary Contact
Secondary Email
Secondary Phone

Status
Language
Field Separator

Time Zone

Location Description

Enable Duplicates
Enable WatchList
Enable WatchListSMS Subscription
Request WiFi access for visitor

Directions / Parking Instructions
(Instructions will be shared with visitors via email notifications.)

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

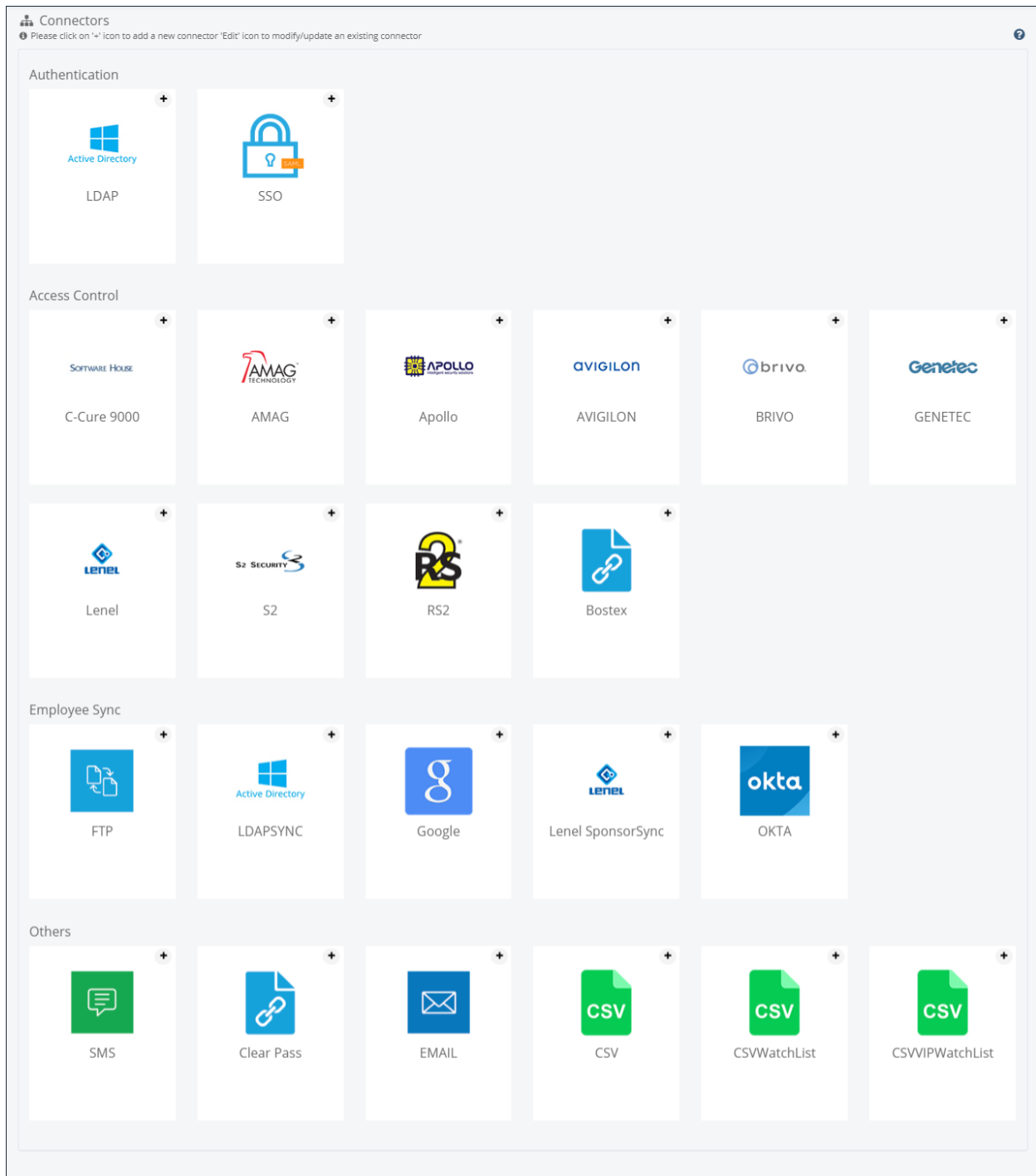
Edit Provider Location

Location Name *	<input type="text" value="Paris"/>	Address Line 1	<input type="text" value="Address Line 1"/>	
Display Name *	<input type="text" value="Paris"/>	Address Line 2	<input type="text" value="Address Line 2"/>	
Display Sequence	<input type="text" value="2"/>	City	<input type="text" value="City"/>	State <input type="text" value="State"/>
Primary Contact	<input type="text" value="Contact Name"/>	Primary Email	<input type="text" value="Primary Email"/>	Primary Phone <input type="text" value="Primary Phone"/>
Secondary Contact	<input type="text" value="Contact Name"/>	Secondary Email	<input type="text" value="Secondary Email"/>	Secondary Phone <input type="text" value="Secondary Phone"/>
Status	<input type="text" value="Active"/>	Language	<input type="text" value="English"/>	Field Separator <input type="text" value="Field Separator"/>
Time Zone	<input type="text" value="Europe/Paris(CET) - GMT+2:0"/>	Enable Duplicates	<input type="checkbox"/>	
Location Description	<input type="text" value="Long Description"/>	Enable WatchList	<input checked="" type="checkbox"/>	
		Enable WatchListSMS Subscription	<input checked="" type="checkbox"/>	
		Request WIFI access for visitor	<input type="checkbox"/>	

Directions / Parking Instructions
(Instructions will be shared with visitors via email notifications.)

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

Add Connector Parameters
Please Fill Connector Parameters

Connection Type : EMAIL

Connector Parameters

SMTP Host *	<input type="text" value="smtp.testgrid.net"/>	Mail Format *	<input type="text" value="text/html"/>
Port *	<input type="text" value="29"/>	Enable Email *	<input type="text" value="1"/>
User Name *	<input type="text" value="apikey"/>	Password	<input type="text" value="Password"/>
protocol *	<input type="text" value="smtp"/>	Max Relay *	<input type="text" value="300"/>
Enable Start TLS	<input checked="" type="checkbox"/>	SMTP Authorization Required	<input type="checkbox"/>
General Pool	<input checked="" type="checkbox"/>	AdditionalFields	<input type="text" value="AdditionalFields"/>
Send Email Asynchronously(Possible Values: Yes, No)	<input type="text" value="Send Email Asynchronously(Possible Values: Yes, No)"/>	Email Socket TimeOut	<input type="text" value="Email Socket TimeOut"/>
		Connection Name *	<input type="text" value="Email"/>

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.

Add Provider Location
Please select the Provider Location

Connection Name : Email **Connection Type : EMAIL**

Allowed **Location Name**

Global Settings

Show entries Showing 1 to 1 of 1 entries

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

Set Connector Parameters
Click on "Edit" to edit Connector parameters.

Connection Type : EMAIL

Connector Parameters Edit

SMTP Host * smtp.testgrid.net	Mall Format * text/html
Port * 29	Enable Email * 1
User Name * apikey	Password
protocol * smtp	Max Relay * 300
Enable Start TLS true	SMTP Authorization Required false
General Pool true	AdditionalFields
Send Email Asynchronously(Possible Values: Yes, No)	Email Socket TimeOut
	Connection Name * Email

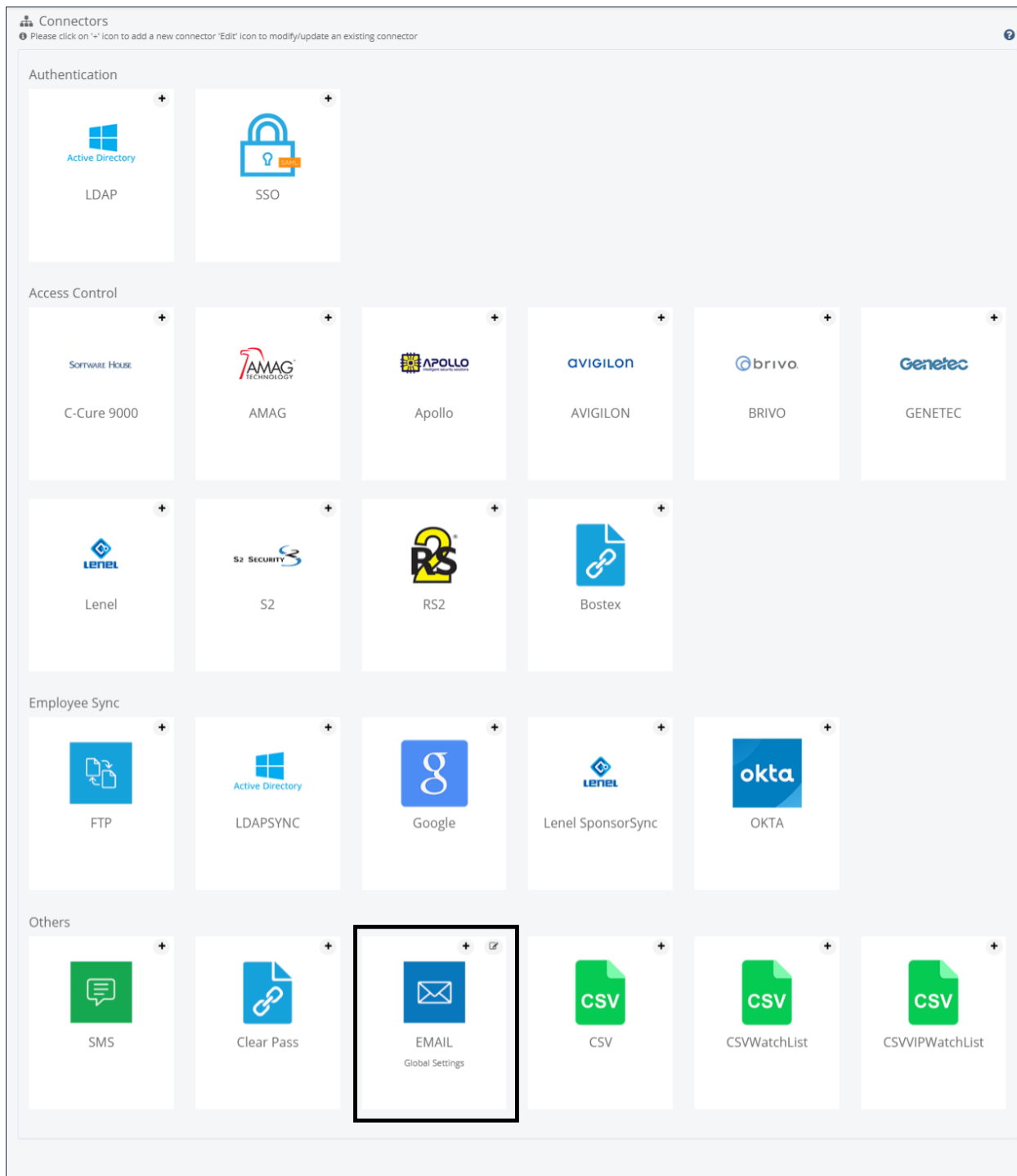
Connector Settings

Locations Edit

Location Id	Location Name
3276801	Global Settings

Delete Cancel

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

Set Connector Parameters
Click on "Edit" to edit Connector parameters.

Connection Type : EMAIL

Connector Parameters Edit

SMTP Host *	smtp.testgrid.net	Mall Format *	text/html
Port *	29	Enable Email *	1
User Name *	apikey	Password	
protocol *	smtp	Max Relay *	300
Enable Start TLS	true	SMTP Authorization Required	false
General Pool	true	AdditionalFields	
Send Email Asynchronously(Possible Values: Yes, No)		Email Socket TimeOut	
		Connection Name *	Email

Connector Settings

Locations Edit

Location Id	Location Name
3276801	Global Settings

Delete Cancel

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.

Connector Settings

Action Mapping Connector Attributes Access Levels Locations

Group Name	Description	Status
LenelCreateUser	LenelCreateUser	ACTIVE
LenelCreateBadge	LenelCreateBadge	ACTIVE
LenelAssignRoles	LenelAssignRoles	ACTIVE
LenelRemoveRoles	LenelRemoveRoles	ACTIVE
LenelDeleteBadge	LenelDeleteBadge	ACTIVE
LenelDeleteUser	LenelDeleteUser	ACTIVE
LenelUpdateUser	LenelUpdateUser	ACTIVE
LenelCreateVisit	LenelCreateVisit	ACTIVE
LenelUpdateVisit	LenelUpdateVisit	ACTIVE
LenelSignInVisit	LenelSignInVisit	ACTIVE
LenelSignOutVisit	LenelSignOutVisit	ACTIVE
LenelGetBadgeKey	LenelGetBadgeKey	ACTIVE
LenelAssignBadge	LenelAssignBadge	ACTIVE
LenelInactiveBadge	LenelInactiveBadge	ACTIVE

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

Connector Settings

Action Mapping Connector Attributes Access Levels Locations

Visitor Action	Connector Action	Connector Attributes	Sequence	Status
REGISTRATION	CREATE USER	<ul style="list-style-type: none"> LenelCreateUser LenelCreateBadge LenelAssignRoles LenelRemoveRoles 		ACTIVE

+Add Save

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

New Connector Role ✕

Please Fill Role Details

Role Name *

Role Description

Location Name

Role Technical Name *

Status

Type

Global Settings

Role Name *

Role Description

Location Name

Role Technical Name *

Status

Type

Global Settings

Cancel
Save

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

The screenshot shows the 'NDA Preferences' section with a table of parameters and the 'NDA' management interface. The table lists parameters like 'NDA For Kiosk', 'Skip Display Of NDA', 'Do Not Display NDA When Login For Employees', and 'NDA For Provider'. The management interface includes a search bar, a status filter (All, Active, Inactive), a table with columns for NDA Name, Description, Status, Created Date/By, Updated Date/By, and Location Name, and a 'Create New' button.

Parameter Name	Description	Default Value	Global Value	Location
NDA For Kiosk	NDA For Kiosk	Disabled	Assign Value	View/Edit
Skip Display Of NDA	Skip Display Of NDA	False	Assign Value	View/Edit
Do Not Display NDA When Login For Employees	Do Not Display NDA When Login For Employees	False	Assign Value	View/Edit
NDA For Provider	NDA For Provider	Disabled	Assign Value	View/Edit

NDA

All active NDAs will be presented to visitor in sequential order

Search NDA Templates [Search]

All Active Inactive

NDA Name	NDA Description	Status	Created Date/By	Updated Date/By	Location Name
No records found.					

Show 10 entries Showing 0 to 0 of 0 records

Create New Delete Cancel

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

The screenshot shows a web form titled "Add NDA Template". The form is organized into two columns of fields. On the left side, there are fields for "NDA Name" (with a red asterisk), "NDA For" (a dropdown menu set to "LA & Kiosk"), "NDA Source Type" (a dropdown menu set to "Text"), "NDA Version" (with a red asterisk), "Language" (a dropdown menu set to "English"), "Apply To" (a multi-select dropdown menu with options: "Other Visitors", "Watch Listed Visitors", "VIP Visitors", "Overnight Visit Request"), "NDA Prompt" (with radio buttons for "All the time" and "Whenever version Changes"), "Modules" (with checkboxes for "Visitor" and "Is Display"), and "NDA Text" (a rich text editor with a toolbar). On the right side, there are fields for "NDA Description", "Status" (a dropdown menu set to "Active"), "Location" (a dropdown menu set to "-- Select --"), "Display Sequence", "Capture visitor signature" (checkbox), "Applicable to email NDA" (checkbox), and "Ask visitor to sign NDA for every" (input field) followed by "months" (checkbox). At the bottom left of the form, there are two buttons: "Save" (in a green box) and "Cancel".

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

NDA Preferences

Manage NDA Preferences

Parameter Name	Description	Default Value	Global Value	Location
NDA For Kiosk	NDA For Kiosk	Disabled	Assign Value	View/Edit
Skip Display Of NDA	Skip Display Of NDA	False	Assign Value	View/Edit
Do Not Display NDA When Login For Employees	Do Not Display NDA When Login For Employees	False	Assign Value	View/Edit
NDA For Provider	NDA For Provider	Disabled	Assign Value	View/Edit

NDA

All active NDAs will be presented to visitor in sequential order

Search NDA Templates



All Active Inactive

Template has been added Successfully.

NDA Name	NDA Description	Status	Created Date/By	Updated Date/By	Location Name
Visitor NDA	Visitor NDA	Active	05-27-2019 / Test Provider	05-27-2019 / Test Provider	Global Settings

Show 10 entries Showing 1 to 1 of 1 entries

Create New

Delete

Cancel

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

Edit NDA Template

NDA Name * Visitor NDA

NDA Description Visitor NDA

NDA For LA & Kiosk

NDA Source Type Text

NDA Version * 1

Status Active

Location Global Settings

Language English

Display Sequence 20

Apply To Other Visitors, Watch Listed Visitors, VIP Visitors, Overnight Visit Request

Capture visitor signature

Applicable to email NDA

NDA Prompt All the time Whenever version Changes Ask visitor to sign NDA for every months

Modules Visitor Is Display

NDA Text

1. I may be given access to confidential information belonging to (the "Company") through my relationship with Company or as a result of my access to Company's premises.

2. I understand and acknowledge that Company's trade secrets consist of information and materials that are valuable and not generally known by Company's competitors, including:

(a) Any and all information concerning Company's current, future or proposed products, including, but not limited to, computer code,

Save Cancel

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

NDA Preferences
Manage NDA Preferences

Parameter Name	Description	Default Value	Global Value	Location
NDA For Kiosk	NDA For Kiosk	Disabled	Assign Value	View/Edit
Skip Display Of NDA	Skip Display Of NDA	False	Assign Value	View/Edit
Do Not Display NDA When Login For Employees	Do Not Display NDA When Login For Employees	False	Assign Value	View/Edit
NDA For Provider	NDA For Provider	Disabled	Assign Value	View/Edit

NDA

All active NDAs will be presented to visitor in sequential order

Search NDA Templates

All Active Inactive

Template has been edited Successfully.

NDA Name	NDA Description	Status	Created Date/By	Updated Date/By	Location Name
<input type="checkbox"/> Visitor NDA	Visitor NDA	Active	05-27-2019 / Test Provider	05-27-2019 / Test Provider	Global Settings

Show 10 entries Showing 1 to 1 of 1 entries

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

Tenants

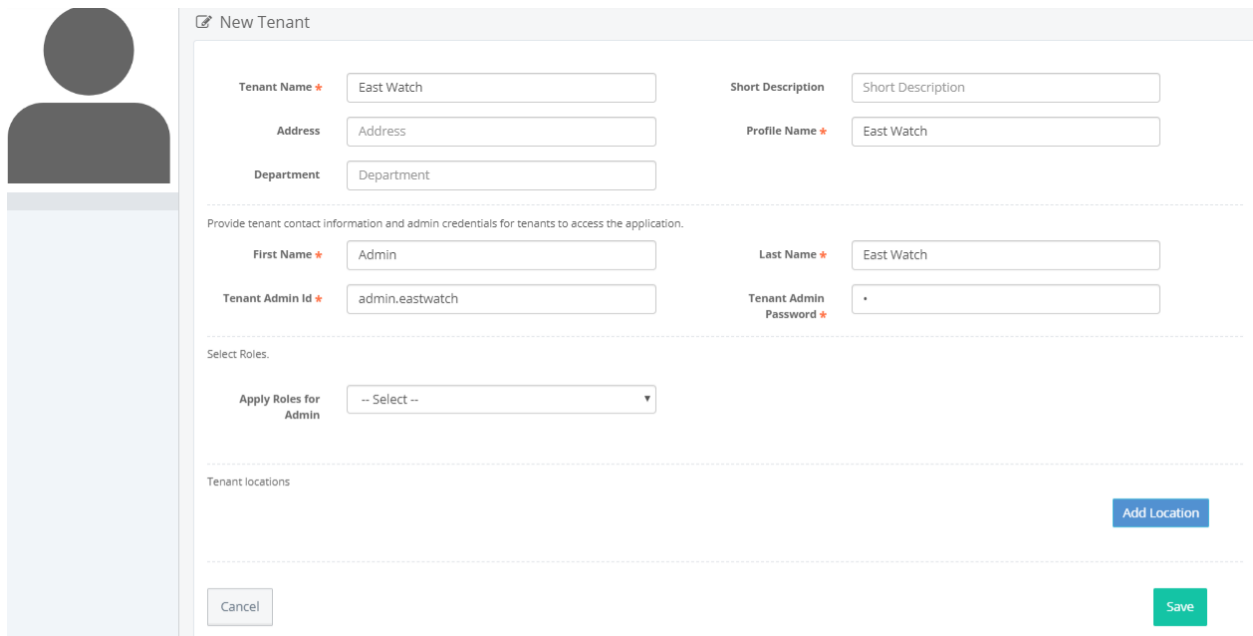
The Tenants component allows an admin to view and maintain tenants and their profiles at one place. The admin can create and maintain tenant information including assigning roles and permissions, all in the Tenant module.

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

Tenants

Search Tenant

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.



New Tenant

Tenant Name * Short Description

Address Profile Name *

Department

Provide tenant contact information and admin credentials for tenants to access the application.

First Name * Last Name *

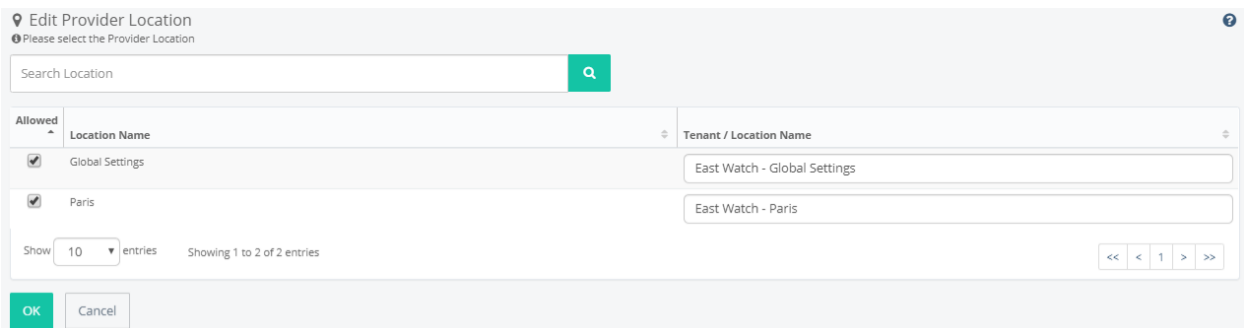
Tenant Admin Id * Tenant Admin Password *

Select Roles.

Apply Roles for Admin

Tenant locations [Add Location](#)

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




Edit Provider Location
Please select the Provider Location

Search Location

Allowed	Location Name	Tenant / Location Name
<input checked="" type="checkbox"/>	Global Settings	East Watch - Global Settings
<input checked="" type="checkbox"/>	Paris	East Watch - Paris

Show entries Showing 1 to 2 of 2 entries

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

 New Tenant

Tenant Name * Short Description

Address Profile Name *

Department

Provide tenant contact information and admin credentials for tenants to access the application.

First Name * Last Name *

Tenant Admin Id * Tenant Admin Password *

Select Roles.


Apply Roles for Admin

Tenant locations


[Add Location](#)

Location Id	Location Name
3211265	Paris
3211264	Global Settings

Show entries Showing 1 to 2 of 2 entries

Test Provider Global Settings (PST) Test Provider 


- [Dashboard](#)
- [Visitors](#)
- [Reports](#)
- [Rooms](#)
- [Setup](#)
- [Visitor Broadcast Message](#)
- [Help](#)




[Edit Profile Picture](#)

East Watch

- Profile
- Employees
- Roles and Permissions
- WatchList

 Edit Tenant

 East Watch Tenant successfully created.

Tenant Name * Short Description

Address Profile Name *

Department

Provide tenant contact information and admin credentials for tenants to access the application.

First Name * Last Name *

Tenant Admin Id * Tenant Admin Password

Select Roles.

Apply Roles for Admin

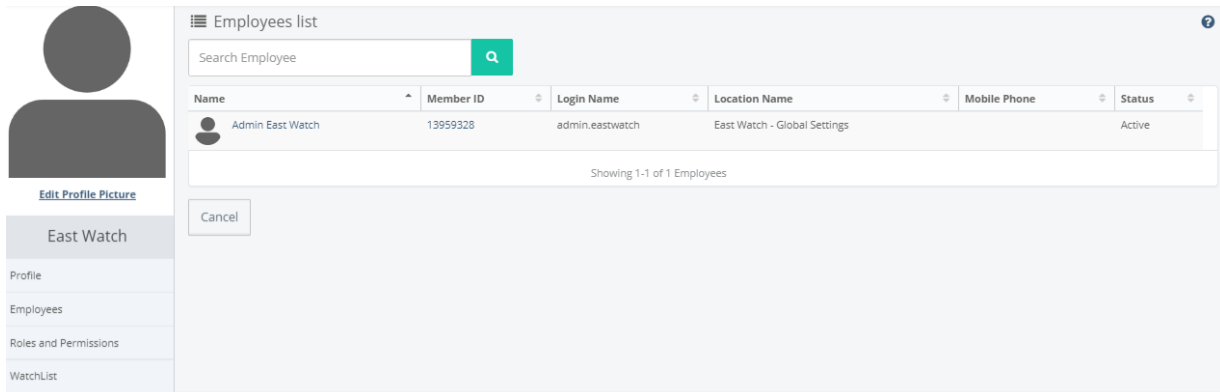
Tenant locations

[Edit Location](#)

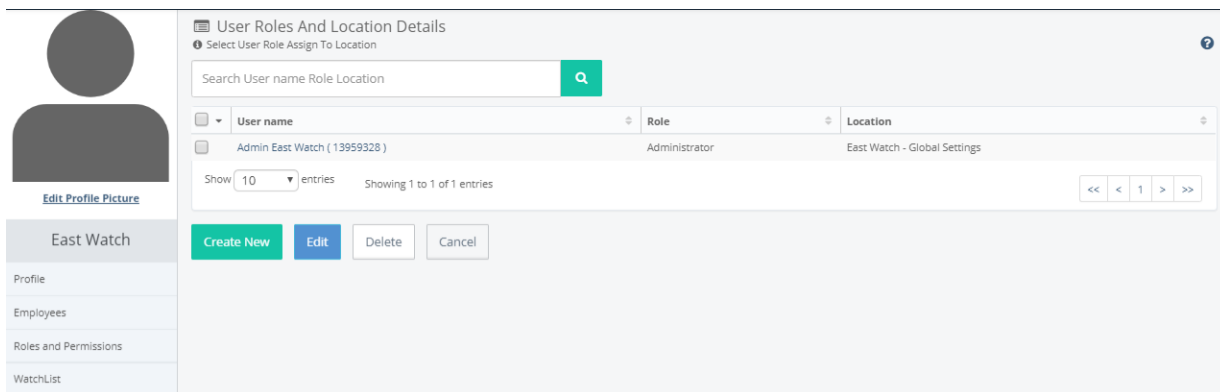
Location Id	Location Name
3211265	Paris

Show entries Showing 1 to 1 of 1 entries

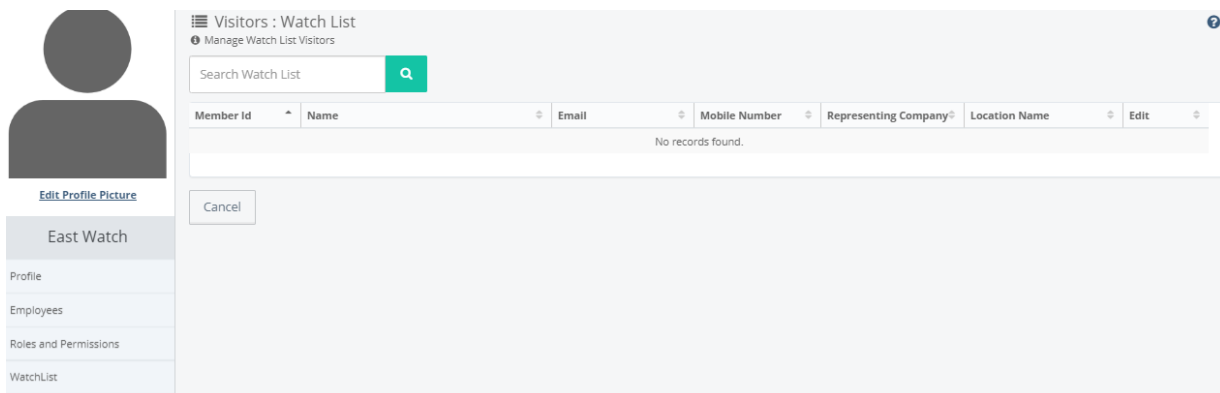
The admin can now upload a profile picture for the tenant. The list of employees can be viewed by clicking on the Employees link under tenant profile.



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.

Global Settings (PST) - Gourinemi - English - splan

Provider Details

Provider Name * Splan

Profile Name * Splan

Work Phone1 Work Phone1

Email info@splan.com

Address Address

Short Description Splan provider

Long Description Long Description

Work Phone2 Work Phone2

Fax Fax

LDAP

Language	Enable	Default
English	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Spanish	<input checked="" type="checkbox"/>	<input type="checkbox"/>
French	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Japanese	<input checked="" type="checkbox"/>	<input type="checkbox"/>
German	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Chinese	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Portuguese	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Swedish	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Dutch	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Ukrainian	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Vietnamese	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Hindi	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Arabic	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Hebrew	<input checked="" type="checkbox"/>	<input type="checkbox"/>

[Save](#) [Cancel](#)

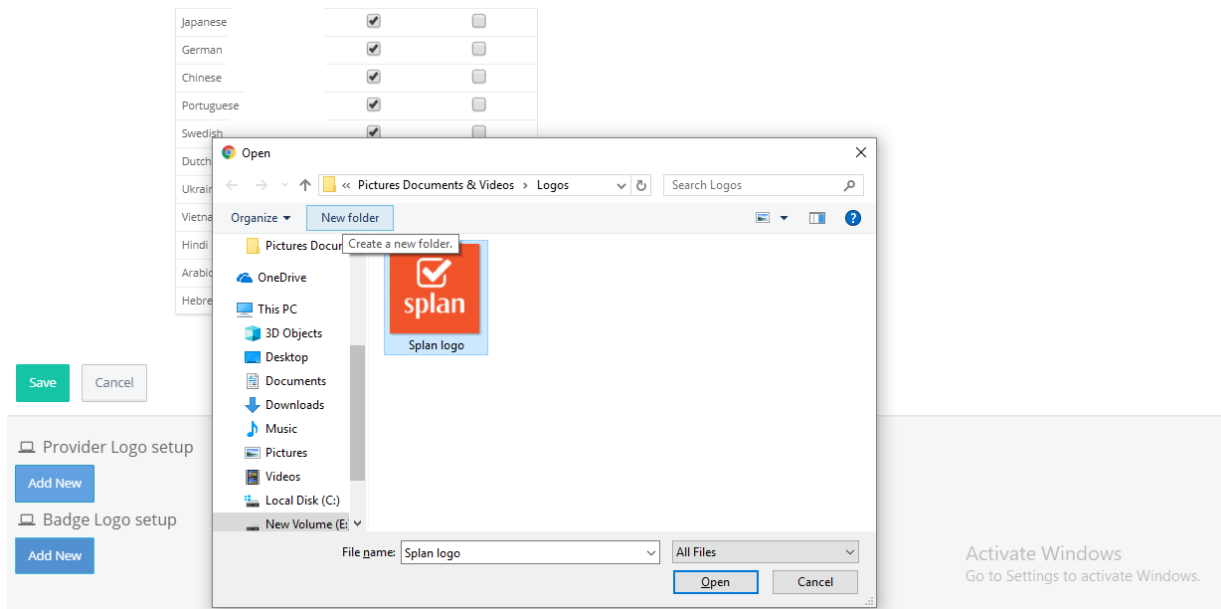
Provider Logo setup [Add New](#)

Badge Logo setup [Add New](#)

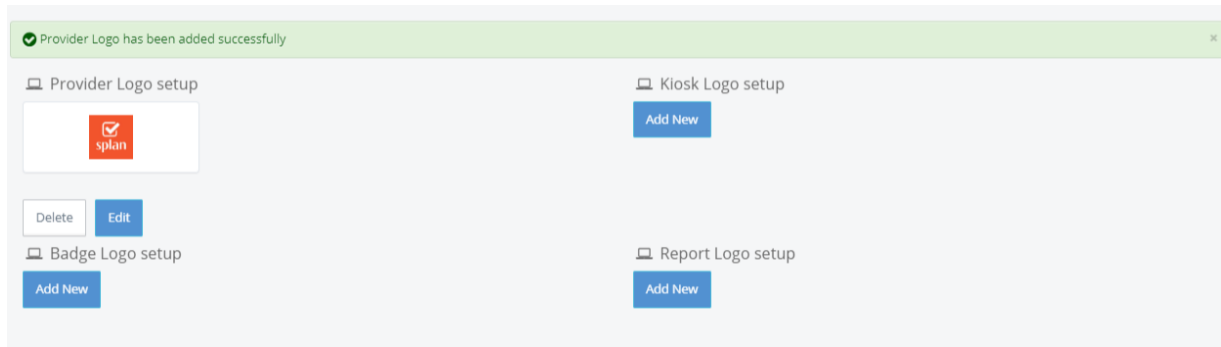
Kiosk Logo setup [Add New](#)

Report Logo setup [Add New](#)

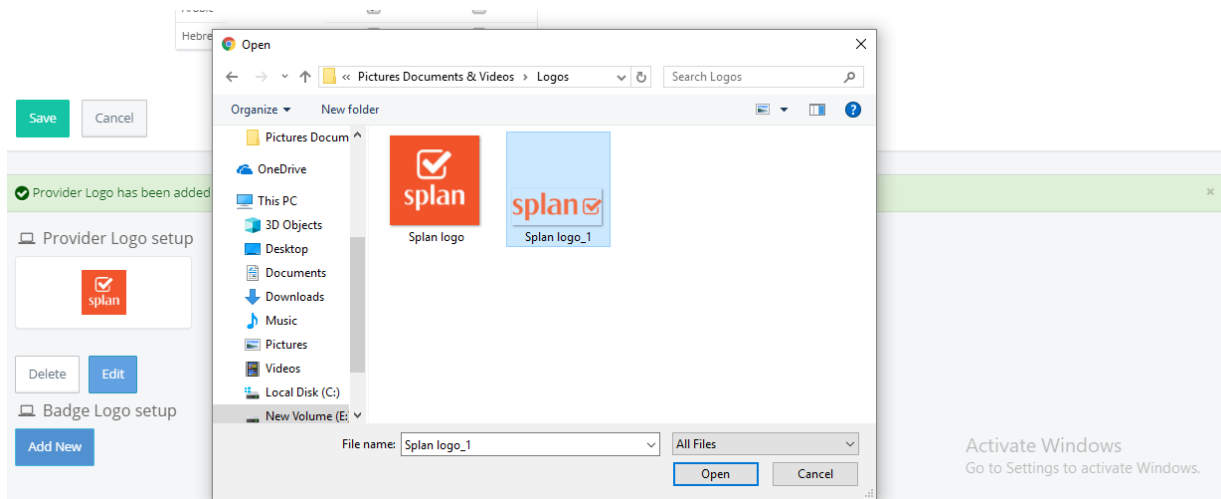
1. To add the provider logo, click on Add New under the Provider Logo setup



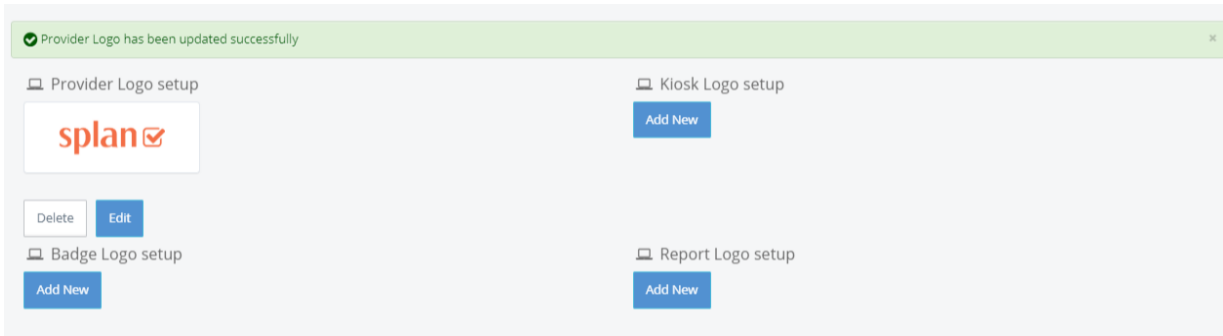
Select the logo and click on Open in the explorer window. The logo gets uploaded successfully.



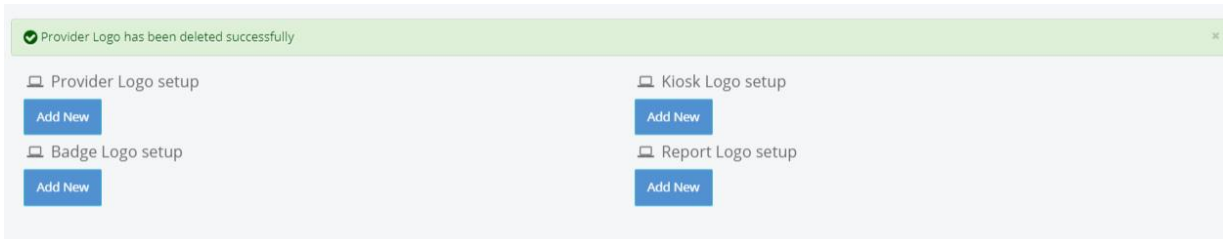
2. To edit the logo, click on the Edit button and select the required logo. Click on Open in the explorer window



The provider logo is updated successfully.



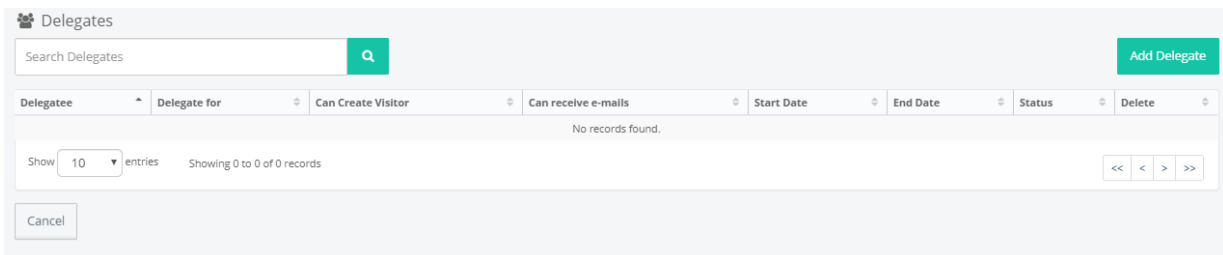
3. To delete a logo, click on the Delete button



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 delegates 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

Add Delegate

Delegatee *

Delegate for *

Start Date

End Date

Status

Can Create Visitor

Can receive e-mails

Make it as permanent delegate

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

Employee Lookup

Search by First Name or Last Name

Name	Location	User Id	Employee Type
<input type="radio"/> Albert Einstein a.einstein@splantest.com	Global Settings	a.einstein	
<input type="radio"/> Gerald Durrell g.durrell@splantest.com	Global Settings	g.durrell	
<input type="radio"/> Marie Curie m.curie@splantest.com	Global Settings	m.curie	

Add Delegate

Delegatee *

Delegate for *

Start Date

End Date

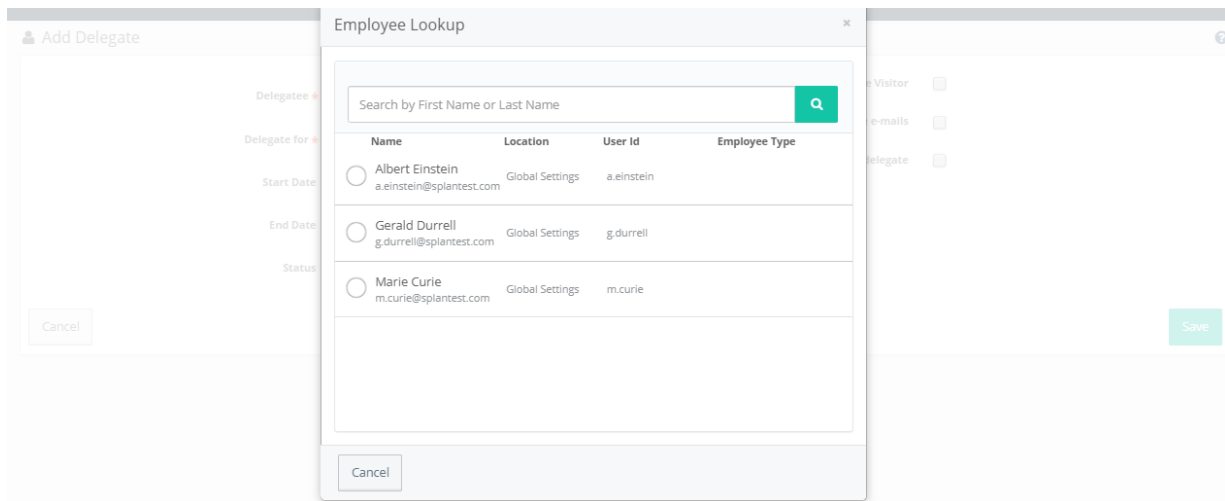
Status

Can Create Visitor

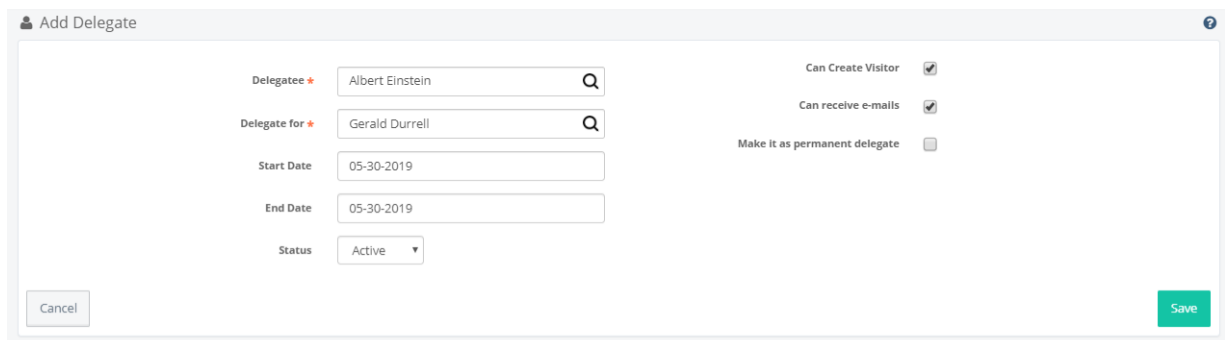
Can receive e-mails

Make it as permanent delegate

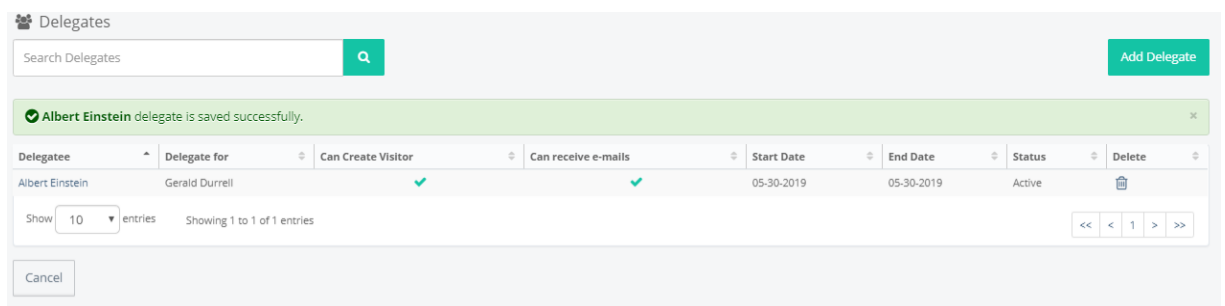
Similarly, click on the Delegate for field and select the delegator from the Employee Lookup pop-up



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.

Edit Delegate

Delegatee *

Delegate for *

Start Date

End Date

Status

Can Create Visitor

Can receive e-mails

Make it as permanent delegate

Click on Save

Delegates

Albert Einstein delegate is updated successfully.

Delegatee	Delegate for	Can Create Visitor	Can receive e-mails	Start Date	End Date	Status	Delete
Albert Einstein	Gerald Durrell	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	05-30-2019	06-01-2019	Active	<input type="button" value="Delete"/>

Show 10 entries Showing 1 to 1 of 1 entries

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

Delegates

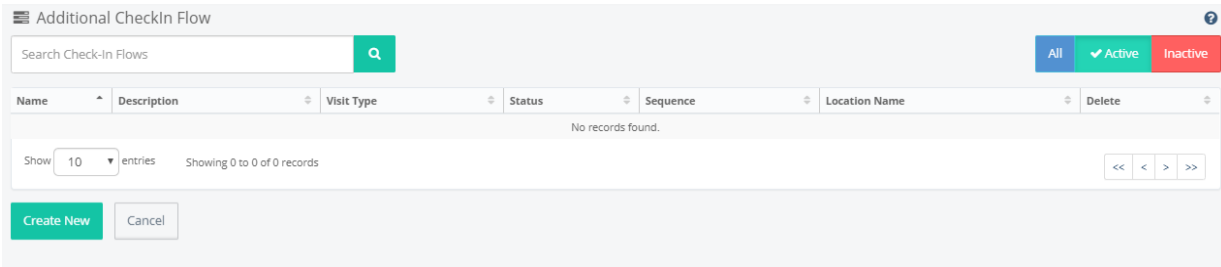
Albert Einstein delegate deleted successfully.

Delegatee	Delegate for	Can Create Visitor	Can receive e-mails	Start Date	End Date	Status	Delete
No records found.							

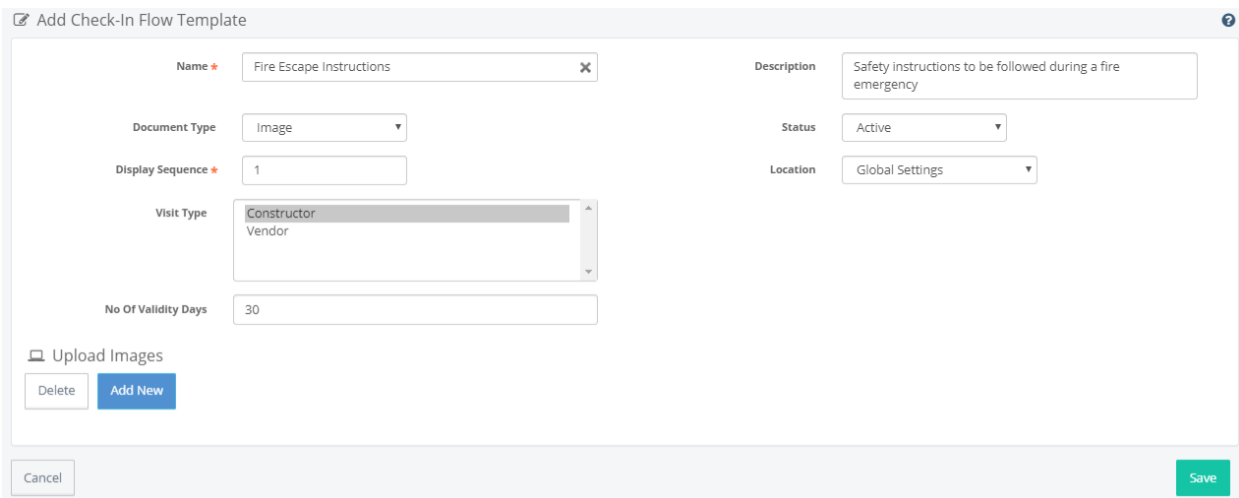
Show 10 entries Showing 0 to 0 of 0 records

Additional CheckIn Flow

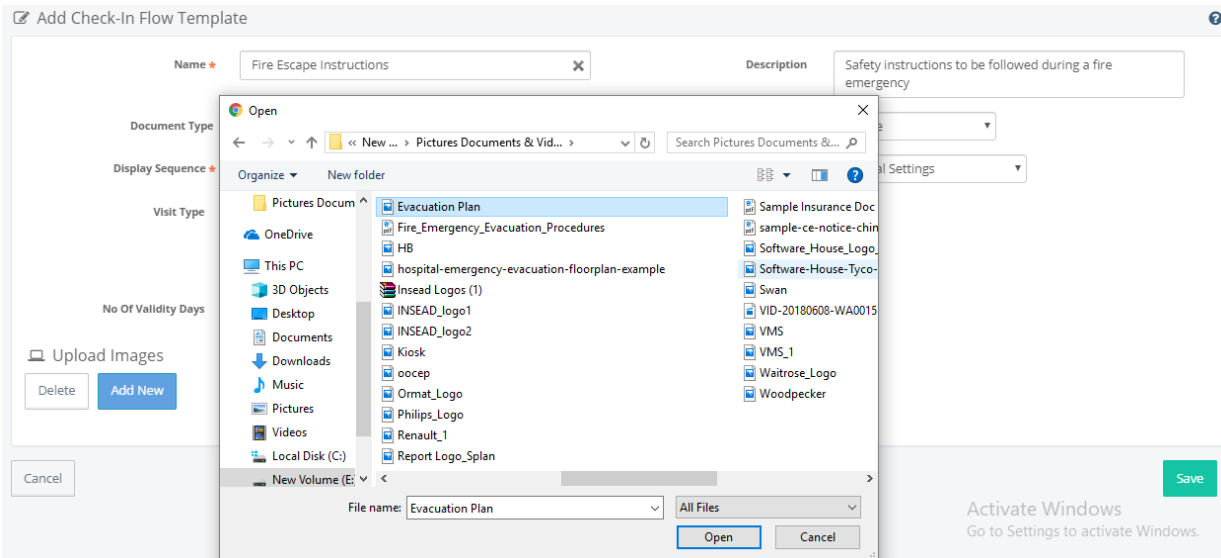
The admin can use the Additional Check-in Flow component to configure additional images/videos/documents for the visitor to review/sign/accept terms and conditions during check-in. This flow can also be configured to be displayed for specific visit types. The admin can also configure the sequence in 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.



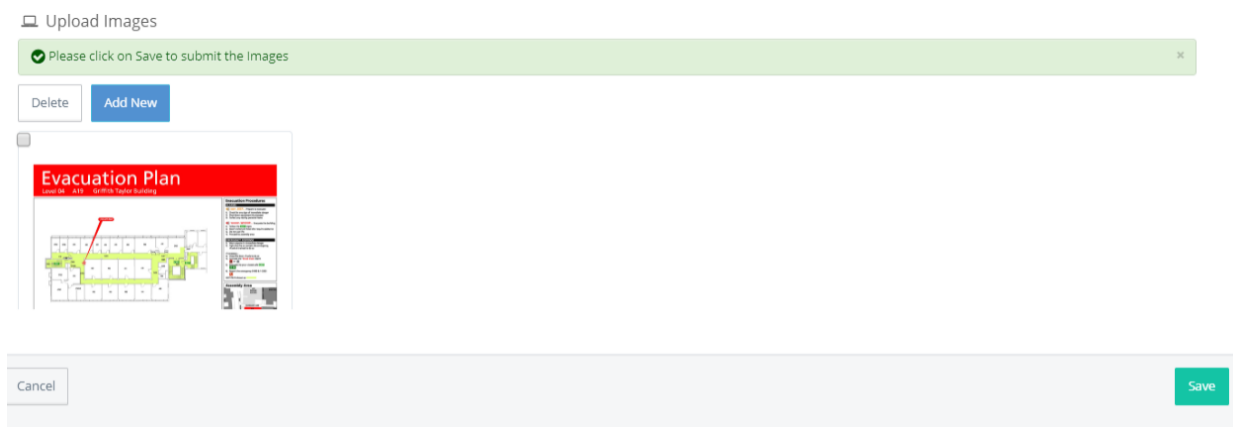
1. To add files to the additional checkin flow, click on Create New to access the Add Check-In Flow Template screen. Enter all the required details.



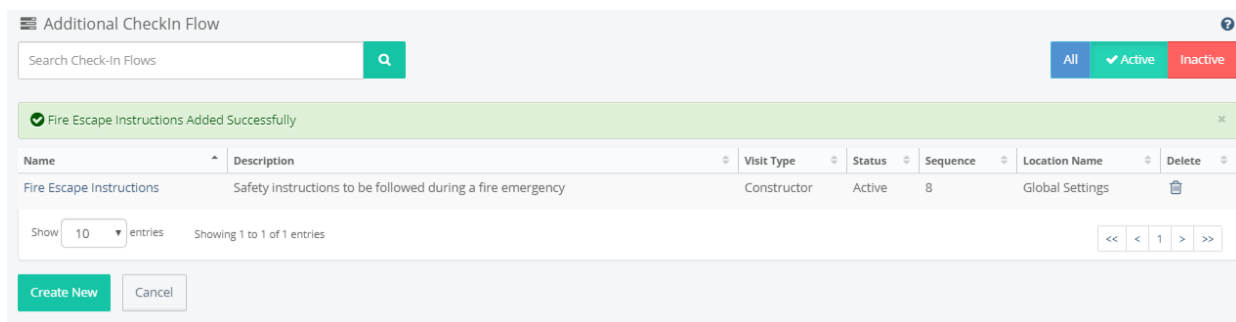
Click on the Add New button to upload the image



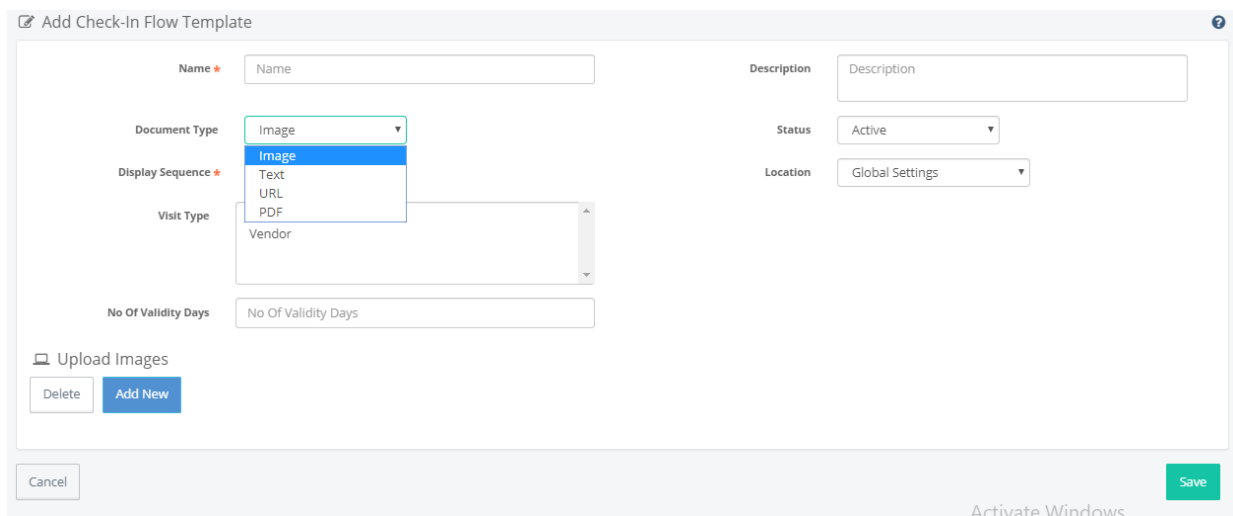
Click on Save



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

Add Check-In Flow Template

Name:

Description:

Document Type:

Status:

Display Sequence:

Location:

Capture Signature:

Show Checkbox: (Used for Accepting the Instructions/Terms)

Text For T&C:

Visit Type:

No Of Validity Days:

Text:

Buttons: Cancel, Save

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

Employees list

Search Employee:

Active Inactive Show All

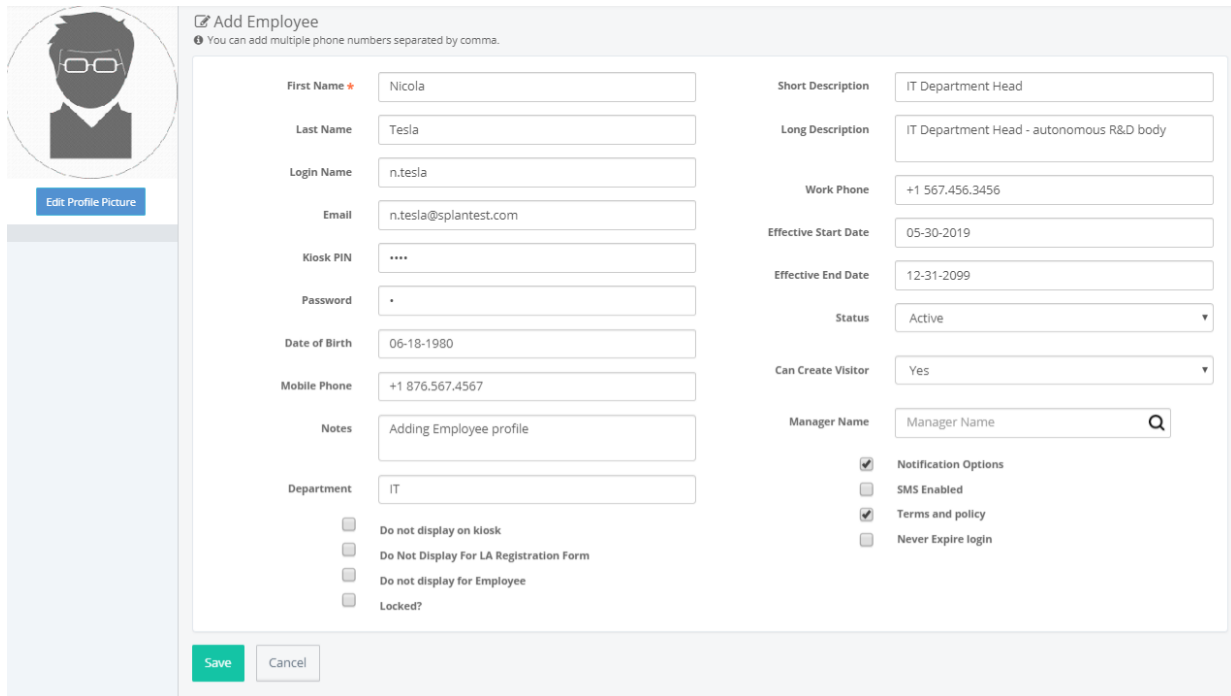
+ Add Employee + Add Existing Employee

Name	Member ID	Login Name	Location Name	Mobile Phone	Status	Delete
Albert Einstein	13959326	a.einstein	Global Settings		Active	
Gerald Durrell	13959325	g.durrell	Global Settings		Active	
Marie Curie	13959327	m.curie	Global Settings		Active	

Showing 1-3 of 3 Employees

Buttons: Cancel, Upload, Export

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



Add Employee
 You can add multiple phone numbers separated by comma.

First Name * Nicola
Last Name Tesla
Login Name n.tesla
Email n.tesla@splantest.com
Kiosk PIN ****
Password .
Date of Birth 06-18-1980
Mobile Phone +1 876.567.4567
Notes Adding Employee profile
Department IT

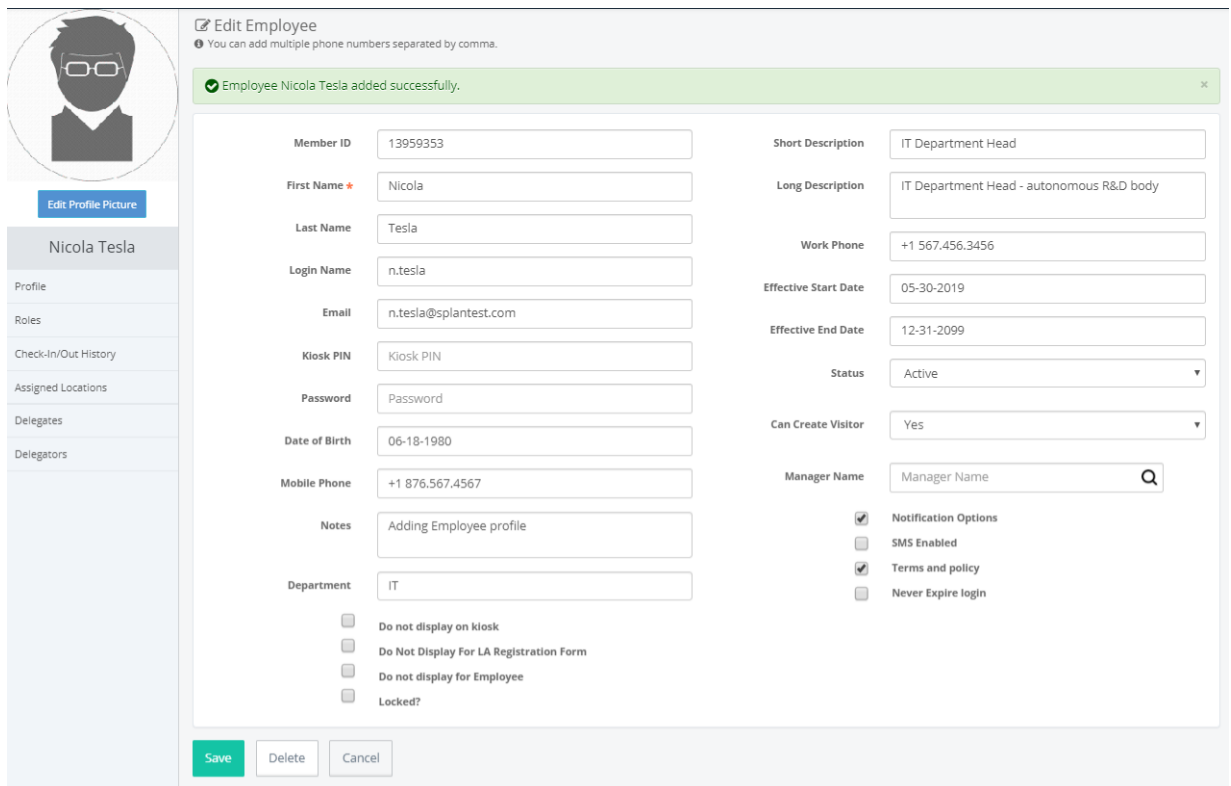
Do not display on kiosk
 Do Not Display For LA Registration Form
 Do not display for Employee
 Locked?

Short Description IT Department Head
Long Description IT Department Head - autonomous R&D body
Work Phone +1 567.456.3456
Effective Start Date 05-30-2019
Effective End Date 12-31-2099
Status Active
Can Create Visitor Yes
Manager Name Manager Name

Notification Options
 SMS Enabled
 Terms and policy
 Never Expire login

Save **Cancel**

Click on Save



Edit Employee
 You can add multiple phone numbers separated by comma.

Employee Nicola Tesla added successfully.

Member ID 13959353
First Name * Nicola
Last Name Tesla
Login Name n.tesla
Email n.tesla@splantest.com
Kiosk PIN Kiosk PIN
Password Password
Date of Birth 06-18-1980
Mobile Phone +1 876.567.4567
Notes Adding Employee profile
Department IT

Do not display on kiosk
 Do Not Display For LA Registration Form
 Do not display for Employee
 Locked?

Short Description IT Department Head
Long Description IT Department Head - autonomous R&D body
Work Phone +1 567.456.3456
Effective Start Date 05-30-2019
Effective End Date 12-31-2099
Status Active
Can Create Visitor Yes
Manager Name Manager Name

Notification Options
 SMS Enabled
 Terms and policy
 Never Expire login

Save **Delete** **Cancel**

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

The screenshot shows the employee profile for Nicola Tesla. On the left is a navigation menu with links for Profile, Roles, Check-in/Out History, Assigned Locations, Delegates, and Delegators. The main content area is divided into two sections:

- Assigned Roles:** A table with columns: Id, Role Name, Role Description, Added on, Location Name, and Delete.
- Available Roles:** A table with columns: Id, Role Name, Role Description, and Add. It lists two roles:

Id	Role Name	Role Description	Add
4161538	Lobby Ambassador	Lobby Ambassador	Add
4161539	Administrator	Administrator	Add

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

The screenshot shows the 'Assigned Locations' configuration page for Nicola Tesla. It includes a search bar for 'Search Location' and a list of locations with checkboxes to indicate assignment:

- Global Settings
- Paris

At the bottom, there are 'Update' and 'Cancel' buttons. The page also shows pagination: 'Showing 1 to 2 of 2 entries'.

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

E) Click on Delegators link to view the list of delegates 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

Employees list

Search Employee

Name	Member ID	Login Name	Location Name	Mobile Phone	Status	Delete
Albert Einstein	13959326	a.einstein	Global Settings		Active	<input type="button" value="Delete"/>
Gerald Durrell	13959325	g.durrell	Global Settings		Active	<input type="button" value="Delete"/>
Marie Curie	13959327	m.curie	Global Settings		Active	<input type="button" value="Delete"/>
Nicola Tesla	13959353	n.tesla	Global Settings	+1 876.567.4567	Active	<input type="button" value="Delete"/>

Showing 1-4 of 4 Employees

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

Test Provider

London (GMT) Test Provider splan

Employees list

Search Employee

Name	Member ID	Login Name	Location Name	Mobile Phone	Status	Delete
Albert Einstein	13959326	a.einstein	Global Settings		Active	
Gerald Durrell	13959325	g.durrell	Global Settings		Active	
Marie Curie	13959327	m.curie	Global Settings		Active	
Nicola Tesla	13959353	n.tesla	Global Settings	+1 876.567.4567	Active	

Showing 1-4 of 4 Employees

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

Existing Employees List

Search Employee

Member ID	Name	Login Name	Mobile Phone	Status
13959356	Oliver Sacks	o.sacks		Active

Showing 1-1 of 1 Employees

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

Employees list

Search Employee

Employee member(s) **Oliver Sacks** has been added successfully.

Name	Member ID	Login Name	Location Name	Mobile Phone	Status	Delete
Albert Einstein	13959326	a.einstein	Global Settings		Active	
Gerald Durrell	13959325	g.durrell	Global Settings		Active	
Marie Curie	13959327	m.curie	Global Settings		Active	
Nicola Tesla	13959353	n.tesla	Global Settings	+1 876.567.4567	Active	
Oliver Sacks	13959356	o.sacks	2 Locations		Active	<input type="button" value="Delete"/>

Showing 1-5 of 5 Employees

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?'

Employees list

Search Employee

Name	Member ID	Login Name	Location Name	Mobile Phone	Status	Delete
Albert Einstein	13959326	a.einstein	Global Settings		Active	<input type="button" value="Delete"/>
Gerald Durrell	13959325	g.durrell	Global Settings		Active	<input type="button" value="Delete"/>
Marie Curie	13959327	m.curie	Global Settings		Active	<input type="button" value="Delete"/>
Nicola Tesla	13959353	n.tesla	Global Settings	+1 876.567.4567	Active	<input type="button" value="Delete"/>

Showing 1-4 of 4 Employees

Delete Confirmation

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.

Employees list

Search Employee

Employee **Albert Einstein** is inactivated as Check-in/out history is not empty


Name	Member ID	Login Name	Location Name	Mobile Phone	Status	Delete
Gerald Durrell	13959325	g.durrell	Global Settings		Active	<input type="button" value="Delete"/>
Marie Curie	13959327	m.curie	Global Settings		Active	<input type="button" value="Delete"/>
Nicola Tesla	13959353	n.tesla	Global Settings	+1 876.567.4567	Active	<input type="button" value="Delete"/>

Showing 1-3 of 3 Employees

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

Employees list

Search Employee

Name	Member ID	Login Name	Location Name	Mobile Phone	Status
 Albert Einstein	13959326	a.einstein	Global Settings		Inactive

Showing 1-1 of 1 Employees

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.

Reason Codes

Reason Codes

ReasonCode ID	ReasonCode Name	Reason Description	Status	Type
No records found.				

Show 10 entries Showing 0 to 0 of 0 records

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

Create Reason Code

Please fill the details

ReasonCode ID * Status

Reason Name * Type

Reason Description *

Enter all the details and click on Save

Create Reason Code

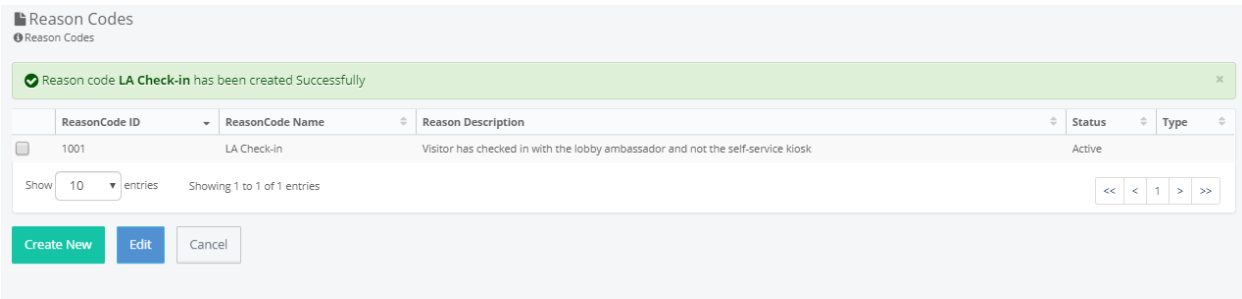
Please fill the details

ReasonCode ID * Status

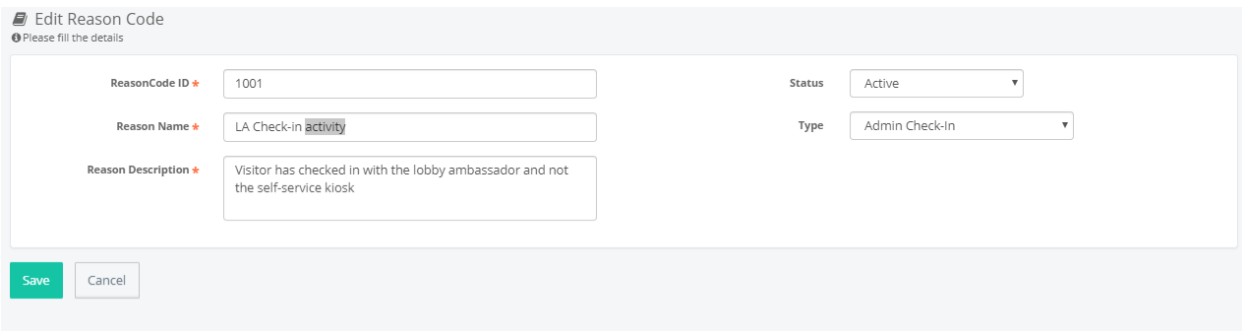
Reason Name * Type

Reason Description *

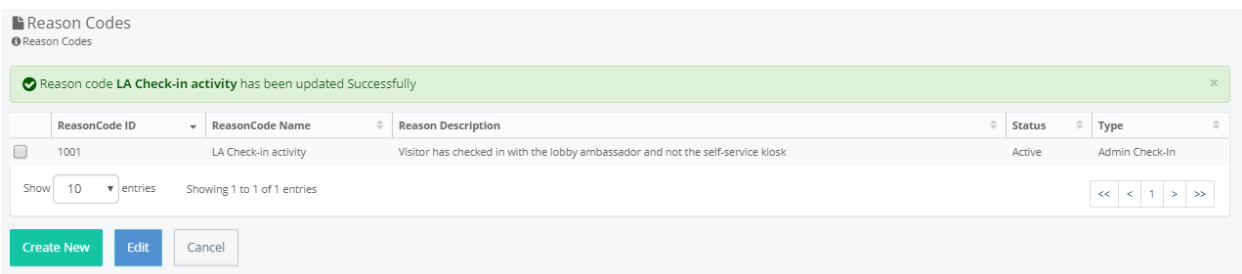
The reason code is created successfully



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

Labels
Manage Labels

Search Label

Label Name	Label Value English	New Value
ZIP_code	ZIP code	<input type="text"/>
Zip	Zip	<input type="text"/>
Your_Name	Your Name	<input type="text"/>
Your_Email	Your E-mail	<input type="text"/>
Young_Toddlers	Young Toddlers	<input type="text"/>
Young_Infants	Young Infants	<input type="text"/>
Youd_Have	You Have	<input type="text"/>
You_Will_Redirected_To_Home_Page	You will be redirected to the home page in	<input type="text"/>
You_link_your_Active_Directory	You can also link to your Active Directory account and upload a list of employees.	<input type="text"/>
You_import_Group_Of_Tenants_From_File	You can import a group of visitors from a CSV file by clicking here:	<input type="text"/>

Show 10 entries Showing 1 to 10 of 5,876 entries

<< < 1 2 3 4 5 ... 588 > >>

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

Labels
Manage Labels

Biometric

Label Name	Label Value English	New Value
IsBiometric	Is Biometric?	<input type="text"/>
Is_Biometric	Biometric	<input type="text"/>
Biometric	Biometric	Biometric Enabled? <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="button" value="X"/>

Show 10 entries Showing 1 to 3 of 3 entries (filtered from 5,876 total records)

<< < 1 > >>

A confirmation message is displayed for the updated label

Labels
Manage Labels

Search Label

Labels updated successfully

Label Name	Label Value English	New Value
ZIP_code	ZIP code	<input type="text"/>
Zip	Zip	<input type="text"/>

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.

Labels
Manage Labels

Biom

Label Name	Label Value English	New Value
IsBiometric	Is Biometric?	<input type="text"/>
Is_Biometric	Biometric	<input type="text"/>
Biometric	Biometric	Biometric Enabled?

Show 10 entries Showing 1 to 3 of 3 entries (filtered from 5,876 total records)

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.

Upload Labels

Language

[Download Template](#)

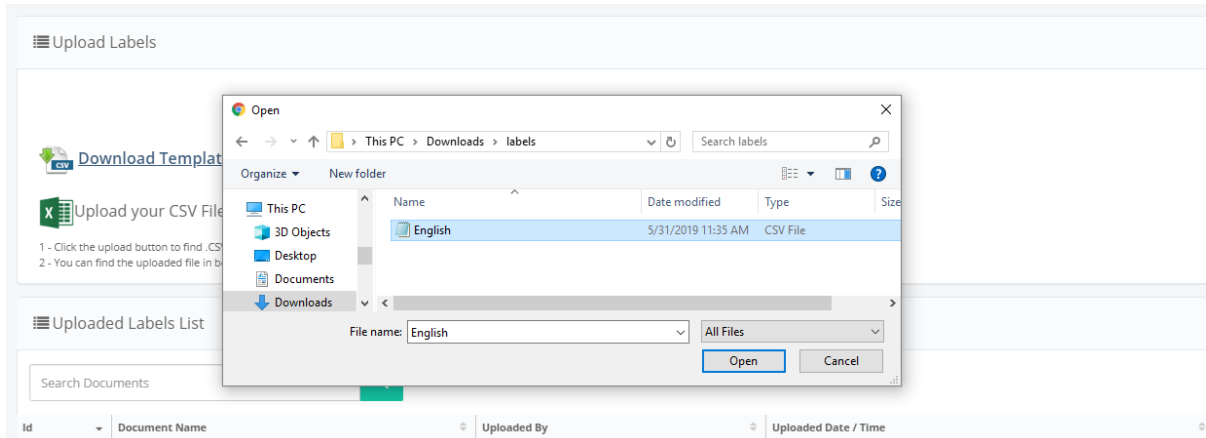
1 - Click the upload button to find .CSV file from your computer and upload.
2 - You can find the uploaded file in below table after upload is completed.

Uploaded Labels List

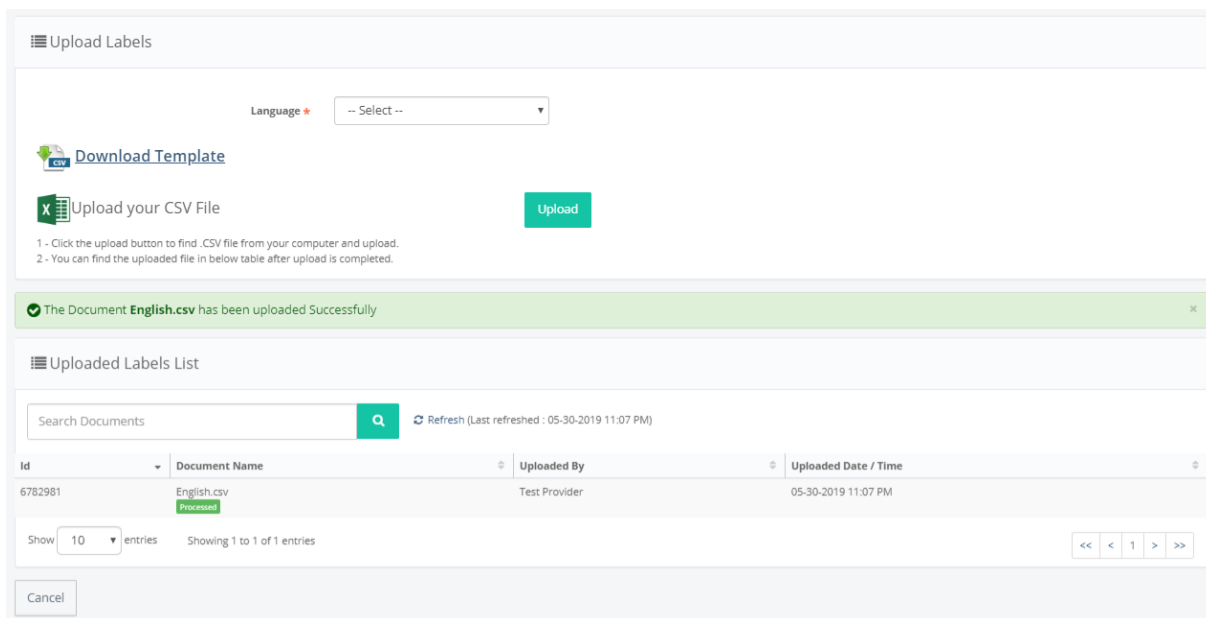
Id	Document Name	Uploaded By	Uploaded Date / Time
No records found.			

Show 10 entries Showing 0 to 0 of 0 records

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

Assets

Search Assets

Asset Id	Asset Name	Asset Type	Start Date	End Date	Location Name	Delete
No records found.						

Show 10 entries Showing 0 to 0 of 0 records

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

Add Asset

Asset Id * Asset Name *

Asset Type * Effective Start Date

Effective End Date

Click on Save

Assets

Search Assets

Asset **Server** created successfully

Asset Id	Asset Name	Asset Type	Start Date	End Date	Location Name	Delete
Server A	Server	Server	05-31-2019	11-30-2019	Global Settings	<input type="button" value="🗑"/>

Show 10 entries Showing 1 to 1 of 1 entries

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

Edit Asset

Asset Id * Asset Name *

Asset Type * Effective Start Date

Effective End Date

Click on Save to view the updated changes

Assets

Search Assets

✔ Asset **Server Equipment** updated successfully

Asset Id	Asset Name	Asset Type	Start Date	End Date	Location Name	Delete
Server A	Server Equipment	Server	05-31-2019	11-30-2019	Global Settings	<input type="button" value="Delete"/>

Show 10 entries Showing 1 to 1 of 1 entries

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

Assets

Search Assets

✔ Asset **Server Equipment** deleted successfully

Asset Id	Asset Name	Asset Type	Start Date	End Date	Location Name	Delete
No records found.						

Show 10 entries Showing 0 to 0 of 0 records

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

Approval Group Maintenance

Please select one Group and click on edit

Search by Group Name or Group Description

Approval Group Name	Approval Group Description	Assignee Count
No records found.		

Show 10 entries Showing 0 to 0 of 0 records

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

Create New Approval Group

Approval Group Name * Approval Group - Paris

Approval Group Description Approval Group for the Paris location

Approval Group Members

Approver	Location Name	Delete
+Add		

Cancel Save

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

Create New Approval Group

Approval Group Name * Approval Group - Paris

Approval Group Description Approval Group for the Paris location

Approval Group Members

Approver	Location Name	Delete
<input type="text"/> <input type="button" value="Q"/>	-- Select --	<input type="button" value="Delete"/>
+Add		

Cancel Save

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

Create New Approval Group

Approval Group Name * Approval Group - Paris

Approval Group Description Approval Group for the Paris location

Approval Group Members

Approver	Location Name	Delete
<input type="text"/> <input type="button" value="Q"/>	-- Select --	<input type="button" value="Delete"/>
+Add		

Cancel Save

Employee Lookup

Search by First Name or Last Name

Name	Location	User Id	Employee Type
<input type="radio"/> Gerald Durrell g.durrell@splantest.com	Global Settings	g.durrell	
<input type="radio"/> Marie Curie m.curie@splantest.com	Global Settings	m.curie	
<input type="radio"/> Nicola Tesla n.tesla@splantest.com	Global Settings	n.tesla	

Cancel

Select the location from the Location Name dropdown.

Create New Approval Group

Approval Group Name * Approval Group - Paris

Approval Group Description Approval Group for the Paris location

Approval Group Members

Approver	Location Name	Delete
Gerald Durrell(13959325)	Paris	

+ Add

Cancel Save

Click on Save. The approval group is created successfully

Approval Group Maintenance

Please select one Group and click on edit

Search by Group Name or Group Description

Approval Group has been created successfully

Approval Group Name	Approval Group Description	Assignee Count
<input type="checkbox"/> Approval Group - Paris	Approval Group for the Paris location	1

Show 10 entries Showing 1 to 1 of 1 entries

Create New Edit Delete Cancel

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

Edit Approval Group

Approval Group Name * Approval Group - Paris

Approval Group Description Approval Group for the Paris location

Approval Group Members

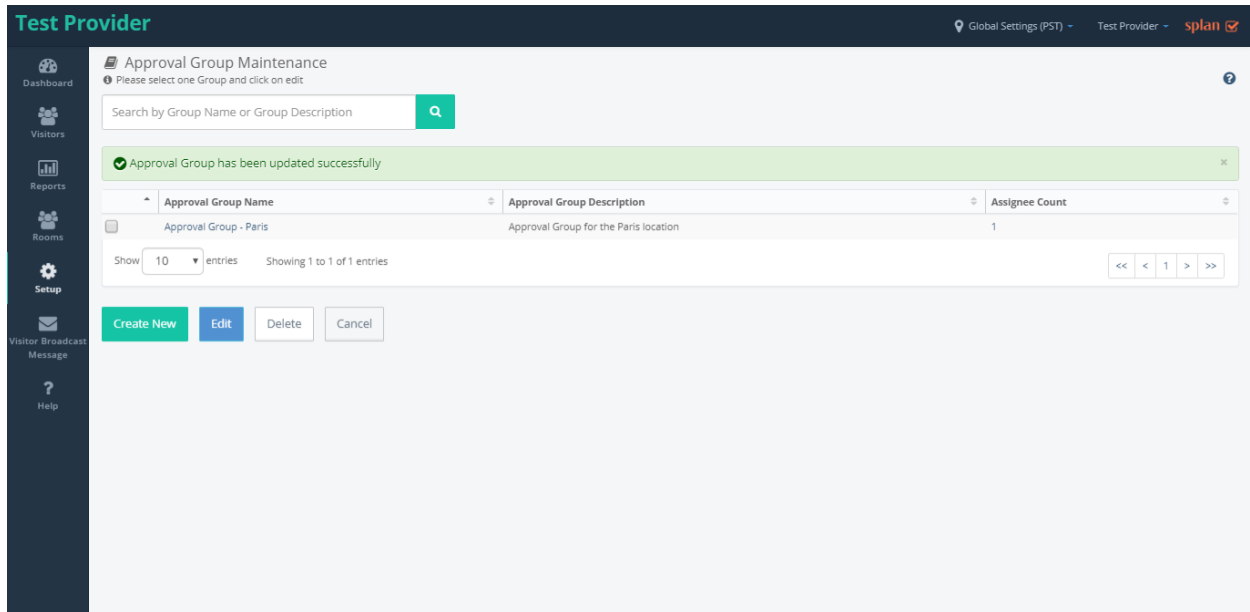
Approver	Location Name	Delete
Gerald Durrell (13959325)	Paris	

+ Add

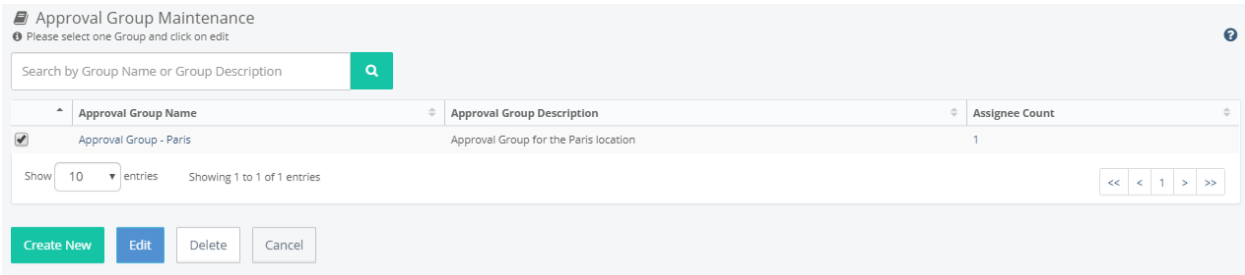
Cancel Save

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

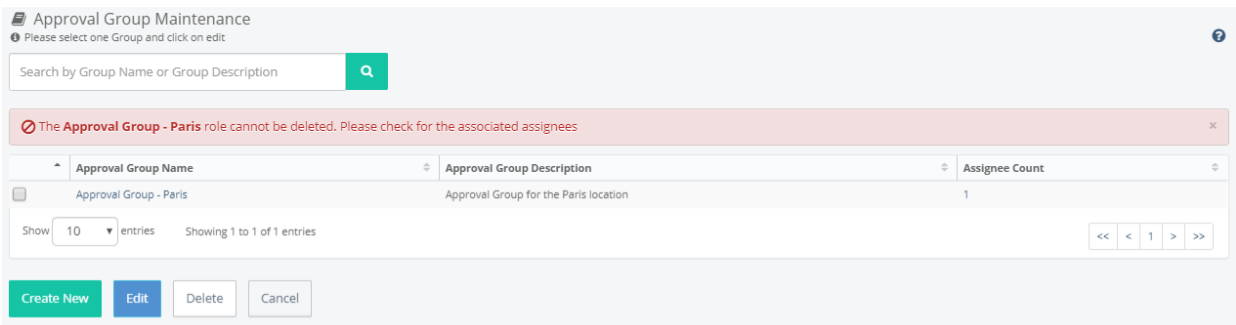
4. Once the required changes are made, click on Save. The approval group changes are updated successfully



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.

Approval Group Maintenance

Please select one Group and click on edit

✔ Approval Group has been deleted successfully

Approval Group Name	Approval Group Description	Assignee Count
No records found.		

Show 10 entries Showing 0 to 0 of 0 records

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