

Powering the trusted identities of
the world's people, places & things

CLIENT – Visitor Management Officer

Version: 5.18 Enterprise



Learning Targets

- PRODUCCCT Control Elements
 - Search Bar & Filter
 - Application Modules
- Settings Application
- Identities Applications
 - Layout
 - Record Detail Pages
 - Workflows
- Visitors Application
 - Left Pane Menu
 - Dashboard
 - Check In
 - Check out
 - Bulk Print
 - All Visits
 - All Visitors
 - Audit

SAFE - Control Elements

- Search Bar & Filter
- Application Modules

Search Bar & Filter

Type in Search Bar
You can search for fields listed in the search bar.

Click Icon to Search
This will perform the search. You can also press enter on your keyboard.

Filters
Here, you can select the value you would like to filter by. Simply select the value by clicking the box next to the value.

Filter Options
Select applicable values to help aid your search.

Hide/Clear Filters

Select Filter Criteria
Click on the box next to the value you would like to filter to.

Search Primary ID, First Name, Last Name, Status, Location Name, Ema

First Name: ▾ × Status: ▾ ×

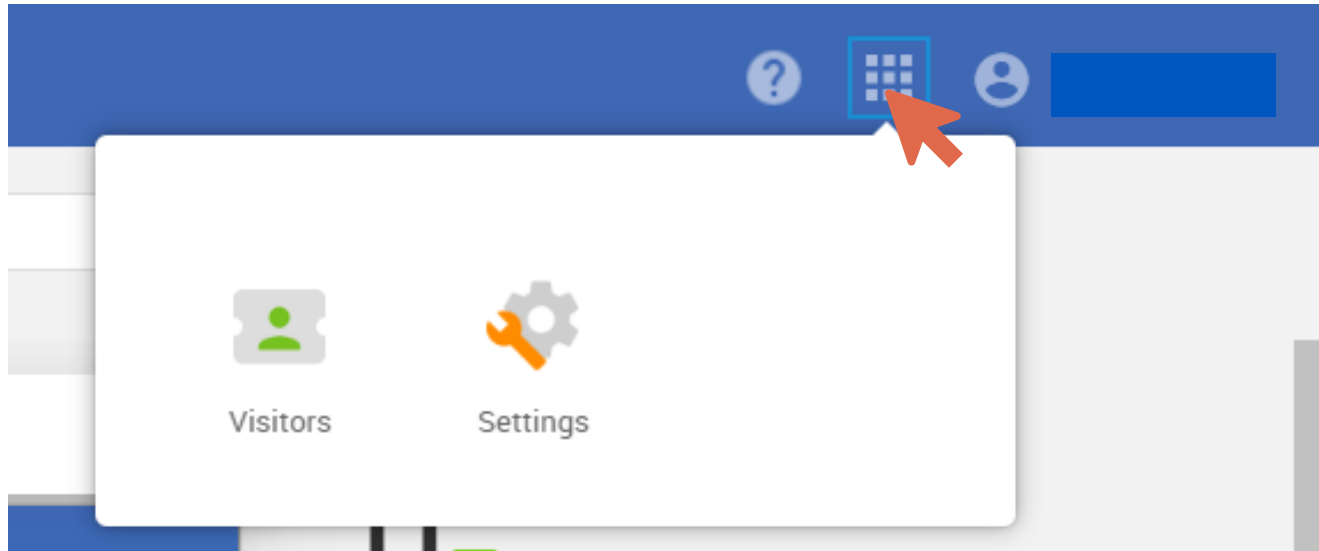
Active
Disabled
Inactive
Suspended
Terminated

CLOSE

Primary ID
 First Name
Last Name
Employee Type
Status
Employer Name
Location Name
Start Date
End Date
Access Card Number

HIDE | CLEAR

Application Modules



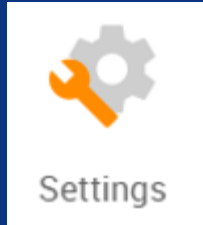
Visitors

This Application Module allows you to validate visits, add visits, check-in/out visits, print badges, and support all visitor activities at the Hospital.

Settings

This Application Module allows you to set preferred languages, set the number of results per page, and select your default application module landing page.

Settings Application



Settings – User Preferences & Configuration

The screenshot shows the 'User Preferences' configuration page. The page title is 'User Preferences' and the sub-section is 'User Configuration'. The configuration options are:

- Preferred Language:** Application is available in other languages only if language packages are enabled by administrators. The dropdown is set to 'Use Browser Language'.
- Number of results per page:** Set the maximum number of search results displayed per page. The dropdown is set to '10'.
- Default landing Application page:** Select the application you want to see when you log in. The dropdown is set to 'Visitors'.
- Default landing Sub-Application page:** Select the sub-application you want to see when you log in. The dropdown is set to '-Sub Application-'.

Callouts on the left side of the page:

- Set Language:** Points to the Preferred Language dropdown.
- Set number of displayed results:** Points to the Number of results per page dropdown.
- Set default Application:** Points to the Default landing Application page dropdown.
- Set default sub-application:** Points to the Default landing Sub-Application page dropdown.

Callouts on the right side of the page:

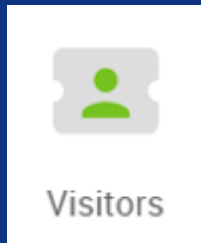
- SAVE:** You must click SAVE to save any changes made. Points to the SAVE button.
- Dropdowns:** Use the dropdowns to select your preferences. Points to the Default landing Sub-Application page dropdown.

Buttons: UNDO, SAVE

URL: https://10.16.30.11/safe/

**It is recommended to set 'Default Landing Application Page' to 'Visitors.'*

Visitors Application



- Left Pane Menu
- Dashboard
- Check In
- Check out
- Bulk Print
- All Visits
- All Visitors
- Audit

Visitors - Left Pane Menu

Dashboard

View upcoming traffic, future traffic, invited visitors daily count, visitors in the building daily count, denied visitors daily count, and no-show visitors' daily count.

Check In

Check in visitors, check in visitor groups, create new staff visits, create new inpatient visits, create outpatient walk-in visits, capture image of visitor, print badges, capture signatures, scan IDs, view visit details, update visitor information, update contact information and update ID information.

Check Out

View all visitors that need to Check out and perform check out procedure

Bulk Print

View all unprinted badges and process them for printing in bulk.

All Visits

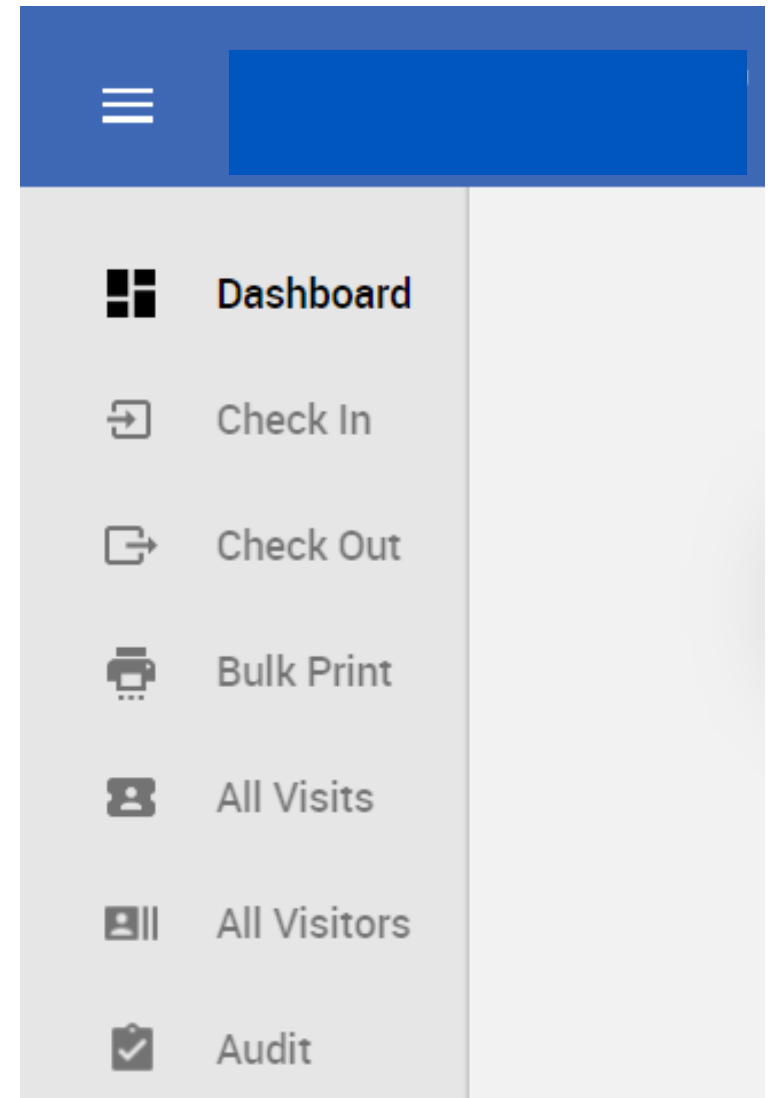
View all scheduled visits.

All Visitors

View all visitors entered in SAFE, add new visitors to visitor list, edit visitor details.

Audit

View all visit entries and backend details of the visit.



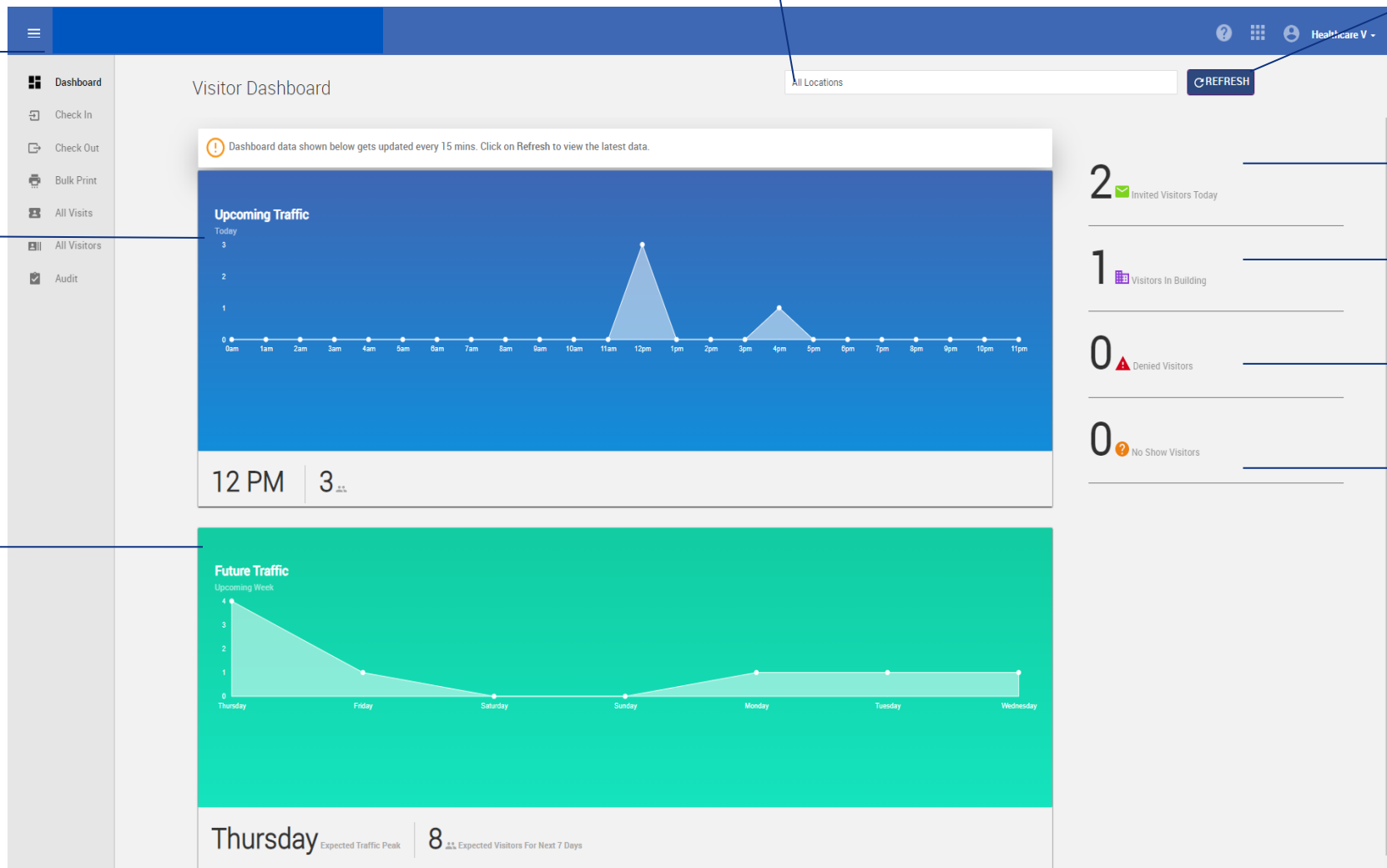
Left Pane
Complete job tasks by navigating to these pages.

Upcoming Traffic
All visits for the day are displayed here by hour.

Future Traffic
All visits for the week are displayed here by day.

Locations
Click to select a specific location.

Refresh
Click Refresh to refresh visit data.
Data refreshes automatically every 15 minutes.



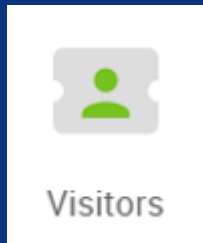
Invited Visitors
Total visitors for the day.

Visitors in Building
Total visitors checked into the building.

Denied Visitors
Total denied visitors for the day.

No Show Visitors
Total number of visitors that did not show up for the day.

Visitors Application – Check In



- Check In Layout
- Check In Visitors Layout
- Workflows
 - Check In Pre-Registered Visitor
 - Group Check In Visitor
 - Schedule a Visit
 - Issue Temp ID
 - Walk-in Visit

Visitors - Check In Layout

The screenshot shows a web application interface for visitor check-in. At the top, there is a navigation bar with a search bar and several action buttons. Below the navigation bar is a sidebar with menu items. The main content area displays a table of visitor records. Callouts point to various UI elements:

- Filters**: Points to the 'Visit Status: Pending, Regist...' dropdown.
- Search Bar**: Points to the search input field.
- Search Options**: Points to the search filter icon.
- Hide/Clear Filter**: Points to the 'HIDE | CLEAR' buttons.
- Schedule a Visit**: Points to the 'SCHEDULE A VISIT' button.
- Issue Temp ID**: Points to the 'ISSUE TEMP ID' button.
- Add Walk-in Visit**: Points to the 'WALK-IN VISIT' button.
- Visitor/Patient Record**: Points to a row in the visitor table.

Name	Company	Confirmation No.	Visit Type	Host	Exp Check In	Visitor Status
BobcatVisit BobcatVisit		8133182	Business Meeting	Bobcat1 Bobcat1	August 1, 2023 2:00 PM	Pending
BobcatVisit BobcatVisit		5238984	Business Meeting	BobcatAdmin BobcatAdmin	August 1, 2023 2:00 PM	Pending
Bob Cat		2100520	Business Meeting	BobcatAdmin BobcatAdmin	August 1, 2023 3:00 PM	Check In Denied
BobcatVisit BobcatVisit		9675100	Business Meeting	BobcatAdmin BobcatAdmin	August 1, 2023 3:00 PM	Invited
Bob Cat		8416424	Business Meeting	BobcatAdmin BobcatAdmin	August 1, 2023 4:00 PM	Check In Denied
Bob Cat		5004217	Business Meeting	BobcatAdmin BobcatAdmin	August 2, 2023 10:00 AM	Pending
Bobcat2 Bobcat2		4085128	Business Meeting	BobcatApprover BobcatApprover	August 2, 2023 10:00 AM	Pending
BobcatVisit BobcatVisit		7718290	Business Meeting	BobcatAdmin BobcatAdmin	August 2, 2023 10:00 AM	Pending
Bobcat1 Bobcat1	Texas State University	2825500	Business Meeting	BobcatAdmin BobcatAdmin	August 2, 2023 11:00 AM	Pending
Bobcat2 Bobcat2		4736144	Business Meeting	BobcatApprover BobcatApprover	August 2, 2023 11:00 AM	Checked Out

Visitors - Check In Visitors Layout

The screenshot displays the 'Check In Visitors' interface for a user named Cameron Dan. The interface is organized into several sections:

- Header:** A blue navigation bar with a menu icon, a search bar, and user information 'Healthcare V'.
- Left Sidebar:** A vertical menu with options: Dashboard, Check In, Check Out, Bulk Print, All Visits, All Visitors, and Audit.
- Main Content Area:**
 - Check In Visitors:** The main title of the page.
 - Visitor Summary:** A card for 'Cameron Dan's Walk-in Visit' showing Host (Cameron Dan), Time (01:40 pm - 05:40 pm), Visit Type (Outpatient), and Visitors checked In to this building (2). A 'VIEW MORE DETAILS' link is present.
 - Search:** A search bar with the placeholder text 'Click Here to Search'.
 - Visitor List:** A list showing 'Cameron...' with a profile icon and action icons.
 - Check In Actions:** A list of actions: Additional Information, Watchlist, Capture Image, Scan ID, and Print Badge, each with a status indicator.
 - Visitor Status:** A section with 'Invited' status and a 'CHECK IN' button.
 - More Actions:** A section for additional actions.
 - Sign Here:** A large button labeled 'Sign Here' with a profile icon above it.
 - Visitor Information Form:** A detailed form on the right for 'Cameron Dan' with fields for:
 - First Name: Cameron
 - Last Name: Dan
 - Date of Birth: 03/24/1972
 - Company: (empty)
 - Visitor Type: Outpatient
 - Country: (empty)
 - Contact Information: Email and Phone (empty)
 - Other Visit Information: Escort Name (empty), Badge Template (Outpatient Visitor with photo), Confirmation No. (3036786)
 - Assistance Required?: No
 - Wi-Fi Required?: No
 - NDA: (empty)
 - ID Information: Scanning Device (Honeywell Reader), ID Type (Select ID Type), Number (empty)
 - SAVE:** A button at the top right of the form.

Visitors - Check In Visitors Layout, Continued

The screenshot displays the 'Check In Visitors' interface. On the left is a navigation sidebar with the following items: Dashboard, Check In, Check Out, Bulk Print, All Visits, All Visitors, and Audit. The main content area is titled 'Check In Visitors' and contains a section for 'SS User's Visit'. This section lists the following details: Host (SS User), Time (04:00 pm - 08:00 pm), Visit Type (Business Meeting), and Visitors checked In to this building (0). Below this information is a 'VIEW MORE DETAILS' link. At the bottom of the main content area is a search bar with the placeholder text 'Click Here to Search'. The footer of the interface shows a user profile for 'Test Te...' and two notification icons (an envelope and a speech bubble). Five callout boxes with lines pointing to specific elements are present: 'Personnel Details' points to the top right header; 'Meeting Notification - On/Off' points to the 'SS User' link; 'Visitor Status - Invited' points to the envelope notification icon; 'Check In/Out Details' points to the speech bubble notification icon; and 'Visit Details (Read Only)' points to the 'VIEW MORE DETAILS' link.

Personnel Details

Meeting Notification - On/Off

Visitor Status - Invited

Check In/Out Details

Visit Details (Read Only)

SS User's Visit

Host: SS User

Time: 04:00 pm - 08:00 pm

Visit Type: Business Meeting

Visitors checked In to this building: 0

[VIEW MORE DETAILS](#)

Click Here to Search

Test Te...

Visitors - Check In Visitors Layout, Continued

Visit Details

CLOSE

Visit Information

VISIT DESCRIPTION
SS User's Visit

VISIT TYPE
Business Meeting

START DATE
11/21/2022

START TIME
4:00 PM

END DATE
11/21/2022

END TIME
8:00 PM

ASSISTANCE REQUIRED?
 Yes No

RECURRING VISIT
 Yes No

Location Information

COUNTRY
United States

STATE
Missouri

LOCATION
St Louis Hospital

BUILDINGS
St Louis Children Hospital

ADDITIONALLY NOTIFY

Access & Approvals

HOST/SPONSOR
SS User

ESCORT
SS User

APPROVER
SS User

ISSUE ACCESS CARD TO VISITOR?
 Yes No

Recurring Visits (6)

Visit Start Date/Time	Visit End Date/Time	Visit Day of Week
Nov 17, 2022 4:00 PM	Nov 17, 2022 8:00 PM	Thursday

Check In Visitors

SS User's Visit

Host: SS User

Time: 04:00 pm - 08:00 pm

Visit Type: Business Meeting

Visitors checked In to this building: 0

[VIEW MORE DETAILS](#)

Click Here to Search

Test Te...

✉ 📄

Personnel Details CANCEL

FIRST NAME SS	EMAIL
MIDDLE NAME	PHONE
LAST NAME User	ALTERNATE PHONE
STATUS Active	MOBILE PHONE
START DATE	EMPLOYER
END DATE	LOCATION
BUILDING	FLOOR

Checked In / Checked Out Details CLOSE

Visitor Status	Time	Action Taken By
Checked Out	Nov 17, 2022 11:59 PM	SAFE , Policy
Checked Out	Nov 17, 2022 11:59 PM	SAFE , Policy
Checked In	Nov 17, 2022 10:20 AM	,
Checked In	Nov 17, 2022 10:20 AM	Healthcare, VMO

Visitors - Check In Visitors Layout

The screenshot displays the 'Check In Visitors' interface. At the top, a blue navigation bar contains a menu icon, a search icon, a grid icon, a user profile icon labeled 'Healthcare V', and a 'CLOSE' button. A left sidebar lists navigation options: Dashboard, Check In, Check Out, Bulk Print, All Visits, All Visitors, and Audit. The main content area is titled 'Check In Visitors' and features a summary card for 'Cameron Dan's Walk-in Visit'. This card includes a green checkmark icon, the host name 'Cameron Dan', the time '01:40 pm - 05:40 pm', the visit type 'Outpatient', and a note that '2' visitors have checked in to the building. Below the summary is a search bar and a list of cameras, with 'Camero...' selected. The central section shows the visitor's name 'Cameron Dan', a placeholder profile picture, and a 'Sign Here' button. To the right of this is a 'Check In Actions' list with options like 'Additional Information', 'Watchlist', 'Capture Image', 'Scan ID', and 'Print Badge'. Below the actions is the 'Visitor Status' section, which shows 'Invited' and a 'CHECK IN' button. The rightmost section is a form for 'Visitor Information', including fields for First Name, Last Name, Date of Birth, Company, Visitor Type (set to 'Outpatient'), Country, Contact Information (Email, Phone), Other Visit Information (Escort Name, Badge Template, Confirmation No.), Assistance Required?, Wi-Fi Required?, NDA, ID Information (Scanning Device, ID Type, Number), and a 'SAVE' button.

Check In Visitors

Cameron Dan's Walk-in Visit

Host: Cameron Dan
Time: 01:40 pm - 05:40 pm
Visit Type: Outpatient
Visitors checked In to this building: 2

[VIEW MORE DETAILS](#)

Click Here to Search

Camero...

Cameron Dan

Sign Here

Check In Actions

- Additional Information
- Watchlist
- Capture Image
- Scan ID
- Print Badge

Visitor Status

Invited **CHECK IN**

Visitor Information

First Name: Cameron
Last Name: Dan
Date of Birth: 03/24/1972
Company:
Visitor Type: Outpatient
Country:
Contact Information
Email:
Phone:
Other Visit Information
Escort Name:
Badge Template: Outpatient Visitor with photo
Confirmation No.: 3036786
Assistance Required?: No
Wi-Fi Required?: No
NDA:
ID Information
Scanning Device: Honeywell Reader
ID Type: Select ID Type
Number:
SAVE

Visitors - Check In Visitors Layout, Continued

The screenshot displays the visitor check-in interface for Cameron Dan. The interface includes a profile section with a name and a placeholder image, a 'Sign Here' box, and a 'Check In Actions' menu. The 'Check In Actions' menu contains options for 'Additional Information', 'Watchlist', 'Capture Image', 'Scan ID', and 'Print Badge'. The 'Visitor Status' section shows 'Checked In' with a green checkmark. The 'More Actions' section includes a dropdown menu and a 'GO' button. Callout boxes provide detailed explanations for these features.

Watchlist Override
This requires review if green checkmark is not present.

Scan ID

Invited – Confirmation Icon

Status Selection

Capture Signature (NDA)

Additional Information
Answer any Admin Required questions

Capture Image of Visitor

Print Visitor Badges

Check In Visitor

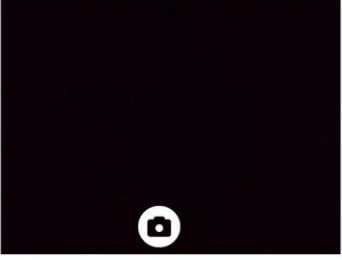
Change Status Button

Visitors - Check In Visitors Layout, Continued

NEW PHOTO CLOSE

CAPTURE UPLOAD

UPLOAD CLOSE



ADVANCED OPTIONS +

ID Scan



Authentication: Passed

Name:

DOB:

Identifier No:

Issuing State/Country:

Issued Date:

Expiration Date:

RE-SCAN ACCEPT CANCEL

NON-DISCLOSURE AGREEMENT CANCEL EXPORT PRINT OK

1. You 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. I agree not to disclose 'Proprietary Information' as defined here to any third party and not to use it for my own or any other party's purposes, except as required by law or court order.

2. I understand and acknowledge that Quantum Secure's 'Proprietary Information' consists 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 printouts, drawings, specifications, notebook entries, technical notes and graphs, computer code, technical memoranda and correspondence, product development agreements and related agreements;

(b) Information and materials relating to Company's purchasing, accounting and marketing, including, but not limited to, marketing plans, sales data, unpublished promotional material, cost and pricing information and customer lists;


(c) Information of the type described above which Company obtained from another party and which Company treats as confidential, whether or not owned or developed by Company.

3. In consideration of being admitted to Company's facilities, I will hold in the strictest confidence any trade secrets or confidential information that is disclosed to me. I will not remove any document, equipment or other materials from the premises without Company's written permission. I will not photograph or otherwise record any information which I may have access during my visit.

4. The obligation and duties set forth herein shall continue for a period of one (1) year from the receipt by signatory.

This Agreement is binding on the me and assigns and issues to the benefit of Company. This Agreement constitutes the entire understanding between Quantum Secure and me with respect to its subject matter. It supersedes all earlier representations and understandings, whether oral or written.

Sign On the Below box:



Clear signature

Name:

Date & Time:

Sign Here +

Check In Actions

- Additional Information
- Watchlist
- Capture Image
- Scan ID
- Print Badge

Visitor Status

- Checked In

More Actions

CHECK OUT

Additional Information SUBMIT CANCEL

TEST

2 Matches For Bad Person ▲

Reported By: Sydney Pitruzzello (NBCU)

The visitor with name 'Bad Person' has been matched in **SAFE WatchList** with a listed identity with name 'Bad Person'. The reason for this match is 'First Name & Last Name Like And matched'. The Watchlist Reason is 'NA'

NOTES

please enter the notes.

CANCEL DENY CHECK IN OVERRIDE

Print Preview PRINT CLOSE



Test Testerman

Headline: SS User

Card No: 1882265

ESCORTEE

✓ **Success!**

Check-in Successful!
for 1 Visitor

Visitors - Check In Visitors Layout

The screenshot displays a web application interface for checking in visitors. The main header is blue with a menu icon on the left and user information 'Healthcare V' on the right. A sidebar on the left contains navigation options: Dashboard, Check In, Check Out, Bulk Print, All Visits, All Visitors, and Audit. The main content area is titled 'Check In Visitors' and features a 'CLOSE' button in the top right. The central focus is on a visitor named 'Cameron Dan', whose name is displayed with a green checkmark icon. Below the name is a large black silhouette of a person's head and shoulders, with the text 'Sign Here' and a blue checkmark icon. To the left of the silhouette, a summary box shows visit details: 'Cameron Dan's Walk-in Visit' (with a green checkmark), Host 'Cameron Dan', Time '01:40 pm - 05:40 pm', Visit Type 'Outpatient', and 'Visitors checked In to this building' count of 2. A 'VIEW MORE DETAILS' link is below this summary. Underneath is a search bar with the text 'Click Here to Search'. Below the search bar is a list of items, currently showing 'Camero...' with a camera icon and a blue checkmark. To the right of the silhouette, a 'CHECK IN' button is visible. Below the 'Sign Here' area is a 'Check In Actions' list with icons and arrows: 'Additional Information', 'Watchlist', 'Capture Image', 'Scan ID', and 'Print Badge'. Below this is a 'Visitor Status' section with an 'Invited' status and a blue checkmark icon. At the bottom left, there is a 'More Actions' section. On the right side of the interface, a 'Visitor Information' form is displayed, containing fields for First Name (Cameron), Last Name (Dan), Date of Birth (03/24/1972), Company, Visitor Type (Outpatient), Country, Contact Information (Email, Phone), Other Visit Information (Escort Name, Badge Template, Confirmation No. 3036786, Assistance Required?, Wi-Fi Required?, NDA), ID Information (Scanning Device: Honeywell Reader, ID Type: Select ID Type, Number), and a 'SAVE' button in the top right corner of the form area.

Visitors - Check In Visitors Layout, Continued

Visitor Information

You may update any non-grayed out information.

Contact Information

You may update any non-grayed out information.

Other Visit Information

You may update any non-grayed out information.

ID Information

Scanning visitor ID will auto-fill in this information.

CLOSE

SAVE

Visitor Information

First Name: Test

Last Name: Testerson

Date of Birth: [Calendar Icon]

Company: [Grayed Out]

Visitor Type: Visitor

Country: [Grayed Out]

Contact Information

Email: test@test.com

Phone: [Grayed Out]

Other Visit Information

Escort Name: SS User

Badge Template: QS Badge Template Landscape - Label Printer - Grayscale

Confirmation No.: 1882291

Assistance Required?: Yes No

Wi-Fi Required?: Yes No

NDA: No

ID Information

Scanning Device: E-Seek [QR Icon]

Select the scanner and scan to populate data or fill manually

ID Type: Select ID Type

Number: [Grayed Out]

Expiration Date: [Calendar Icon]

Issuing Country: Select

Issuing State: Select

Close
This will return the user to the Check In Page.

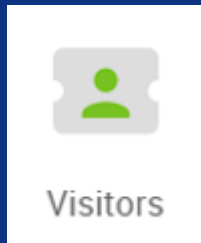
Save Button
Required to update the fields displayed.

Visitors - Check In Visitors Layout

The screenshot shows a web application interface for checking in visitors. The layout is divided into several sections:

- Header:** A blue navigation bar with a menu icon, a search bar, and user information (Healthcare V).
- Left Sidebar:** A vertical menu with options: Dashboard, Check In, Check Out, Bulk Print, All Visits, All Visitors, and Audit.
- Main Content Area:**
 - Check In Visitors:** A title bar with a 'CLOSE' button.
 - Visitor Summary:** A card for 'Cameron Dan's Walk-in Visit' with a green checkmark. It lists: Host (Cameron Dan), Time (01:40 pm - 05:40 pm), Visit Type (Outpatient), and Visitors checked In to this building (2). A 'VIEW MORE DETAILS' link is present.
 - Search:** A search bar with the placeholder text 'Click Here to Search'.
 - Camera Feed:** A placeholder for a camera view labeled 'Camero...'. Below it is a 'Sign Here' button.
 - Check In Actions:** A list of actions with status indicators: Additional Information (disabled), Watchlist (checked), Capture Image (disabled), Scan ID (disabled), and Print Badge (disabled).
 - Visitor Status:** A section with an 'Invited' status and a 'CHECK IN' button.
 - More Actions:** A section for additional actions.
- Visitor Information Form:** A form on the right with a green checkmark and a 'SAVE' button. It contains fields for:
 - Visitor Information: First Name (Cameron), Last Name (Dan), Date of Birth (03/24/1972), Company, Visitor Type (Outpatient), and Country.
 - Contact Information: Email and Phone.
 - Other Visit Information: Escort Name, Badge Template (Outpatient Visitor with photo), Confirmation No. (3036786), Assistance Required? (No), and Wi-Fi Required? (No).
 - ID Information: Scanning Device (Honeywell Reader), ID Type (Select ID Type), and Number.

Visitors Application – Check In



- ✓ Check In Layout
- ✓ Check In Visitors Layout
- Workflows
 - Check In Pre-Registered Visitor
 - Group Check In Visitor
 - Schedule a Visit
 - Issue Temp ID
 - Walk-in Visit

Visitors - Check In: Pre-Registered Check In Workflow

1. Click 'Check In'

Dashboard

Check In

Search Visitor Name, Host, Confirmation Number, Card Number, Compar... HIDE | CLEAR

SCHEDULE A VISIT ISSUE TEMP ID WALK-IN VISIT

Visit Status: Pending, Regist... X

Name	Company	Confirmation No.	Visit Type	Host	Exp Check In	Visitor Status
BobcatVisit BobcatVisit		8133182	Business Meeting	Bobcat1 Bobcat1	August 1, 2023 2:00 PM	Pending
BobcatVisit BobcatVisit		5238984	Business Meeting	BobcatAdmin BobcatAdmin	August 1, 2023 2:00 PM	Pending
Bob Cat		2100520	Business Meeting	BobcatAdmin BobcatAdmin	August 1, 2023 3:00 PM	Check In Denied
BobcatVisit BobcatVisit		9675100	Business Meeting	BobcatAdmin BobcatAdmin	August 1, 2023 3:00 PM	Invited
Bob Cat		8416424	Business Meeting	BobcatAdmin BobcatAdmin	August 1, 2023 4:00 PM	Check In Denied
Bob Cat		5004217	Business Meeting	BobcatAdmin BobcatAdmin	August 2, 2023 10:00 AM	Pending
Bobcat2 Bobcat2		4085128	Business Meeting	BobcatApprover BobcatApprover	August 2, 2023 10:00 AM	Pending
BobcatVisit BobcatVisit		7718290	Business Meeting	BobcatAdmin BobcatAdmin	August 2, 2023 10:00 AM	Pending
Bobcat1 Bobcat1	Texas State University	2825500	Business Meeting	BobcatAdmin BobcatAdmin	August 2, 2023 11:00 AM	Pending
Bobcat2 Bobcat2		4736144	Business Meeting	BobcatApprover BobcatApprover	August 2, 2023 11:00 AM	Checked Out

2. Search for Visitor

Use the filter to aid you search.

Dashboard

Check In

Search Visitor Name, Host, Confirmation Number, Card Number, Compar... HIDE | CLEAR

SCHEDULE A VISIT ISSUE TEMP ID WALK-IN VISIT

Visit Status: Pending, Regist... X

Name	Company	Confirmation No.	Visit Type	Host	Exp Check In	Visitor Status
BobcatVisit BobcatVisit		8133182	Business Meeting	Bobcat1 Bobcat1	August 1, 2023 2:00 PM	Pending
BobcatVisit BobcatVisit		5238984	Business Meeting	BobcatAdmin BobcatAdmin	August 1, 2023 2:00 PM	Pending
Bob Cat		2100520	Business Meeting	BobcatAdmin BobcatAdmin	August 1, 2023 3:00 PM	Check In Denied
BobcatVisit BobcatVisit		9675100	Business Meeting	BobcatAdmin BobcatAdmin	August 1, 2023 3:00 PM	Invited
Bob Cat		8416424	Business Meeting	BobcatAdmin BobcatAdmin	August 1, 2023 4:00 PM	Check In Denied
Bob Cat		5004217	Business Meeting	BobcatAdmin BobcatAdmin	August 2, 2023 10:00 AM	Pending
Bobcat2 Bobcat2		4085128	Business Meeting	BobcatApprover BobcatApprover	August 2, 2023 10:00 AM	Pending
BobcatVisit BobcatVisit		7718290	Business Meeting	BobcatAdmin BobcatAdmin	August 2, 2023 10:00 AM	Pending
Bobcat1 Bobcat1	Texas State University	2825500	Business Meeting	BobcatAdmin BobcatAdmin	August 2, 2023 11:00 AM	Pending
Bobcat2 Bobcat2		4736144	Business Meeting	BobcatApprover BobcatApprover	August 2, 2023 11:00 AM	Checked Out

Visitors - Check In: Pre-Registered Check In Workflow

3. Select Visitor Record

Check In

Search Visitor Name, Host, Confirmation Number, Card Number, Compar... HIDE | CLEAR

Visit Status: Pending, Regist... x

SCHEDULE A VISIT | ISSUE TEMP ID | WALK-IN VISIT

Visitors	Name	Company	Confirmation No.	Visit Type	Host	Exp Check In	Visitor Status
⊕	BobcatVisit BobcatVisit		8133182	Business Meeting	Bobcat1 Bobcat1	August 1, 2023 2:00 PM	Pending
⊕	BobcatVisit BobcatVisit		5238984	Business Meeting	BobcatAdmin BobcatAdmin	August 1, 2023 2:00 PM	Pending
⊕	Bob Cat		2100520	Business Meeting	BobcatAdmin BobcatAdmin	August 1, 2023 3:00 PM	Check In Denied
⊕	BobcatVisit BobcatVisit		9675100	Business Meeting	BobcatAdmin BobcatAdmin	August 1, 2023 3:00 PM	Invited
⊕	Bob Cat		8416424	Business Meeting	BobcatAdmin BobcatAdmin	August 1, 2023 4:00 PM	Check In Denied
⊕	Bob Cat		5004217	Business Meeting	BobcatAdmin BobcatAdmin	August 2, 2023 10:00 AM	Pending
⊕	Bobcat2 Bobcat2		4085128	Business Meeting	BobcatApprover BobcatApprover	August 2, 2023 10:00 AM	Pending
⊕	BobcatVisit BobcatVisit		7718290	Business Meeting	BobcatAdmin BobcatAdmin	August 2, 2023 10:00 AM	Pending
⊕	Bobcat1 Bobcat1	Texas State University	2825500	Business Meeting	BobcatAdmin BobcatAdmin	August 2, 2023 11:00 AM	Pending
⊕	Bobcat2 Bobcat2		4736144	Business Meeting	BobcatApprover BobcatApprover	August 2, 2023 11:00 AM	Checked Out

4. Review Personnel, Visit, and Check In/Out Details

Review as required. Only available in Read-Only.

Check In Visitors

SS User's Visit

Host: SS User
Time: 02:20 pm - 06:20 pm
Visit Type: Business Meeting
Visitors checked in to this building: 2

VIEW MORE DETAILS

Test Testerson

Sign Here

Visitor Information

First Name: Test
Last Name: Testerson
Date of Birth: 11/17/2022
Company: Visitor
Country: [Dropdown]

Contact Information

Email: test@test.com
Phone: [Input]

Other Visit Information

Escort Name: SS User
Badge Template: Outpatient Visitor with photo
Confirmation No.: 3963966
Assistance Required?: No
Wi-Fi Required?: No
NDA: [Input]

ID Information

Scanning Device: Honeywell Reader
ID Type: [Dropdown]
Number: [Input]

Check In Actions

Additional Information, Watchlist, Capture Image, Scan ID, Print Badge

Visitor Status: Invited

More Actions

Visitors - Check In: Pre-Registered Check In Workflow

5. Capture Signature (NDA)

Capture as needed.

5a. Sign & Click OK

Click 'Export' to export Signed NDA into a PDF.
Click 'Print' to print a signed copy of the signed NDA.

The screenshot shows the 'Check In Visitors' interface for a visitor named 'Test Testerson'. The interface includes a sidebar with navigation options like 'Dashboard', 'Check In', 'Check Out', 'Bulk Print', 'All Visits', and 'Audit'. The main content area displays the visitor's details, including their name, contact information, and a 'Sign Here' button. A red arrow points to the 'Sign Here' button, which is highlighted with a green box. Below the 'Sign Here' button, there are several 'Check In Actions' such as 'Additional Information', 'Watchlist', 'Capture Image', 'Scan ID', and 'Print Badge'. The visitor's status is shown as 'Invited'. The interface also includes a search bar and a 'Test Te...' dropdown menu.

The screenshot shows a 'NON-DISCLOSURE AGREEMENT' form. The form contains several numbered clauses regarding confidentiality and access to information. At the bottom of the form, there is a section titled 'Sign On the Below box:' with a large green rectangular box for a signature. A red arrow points to the signature box, which contains a handwritten signature. Below the signature box, there are fields for 'Name' (TEST TESTERSON) and 'Date & Time' (NOV 21, 2022 1:07 PM). At the top right of the form, there are buttons for 'CANCEL', 'EXPORT', 'PRINT', and 'OK'. A red arrow points to the 'OK' button.

Visitors - Check In: Pre-Registered Check In Workflow

6. Answer Additional Information Questions

Only if option is available. This is enabled by Admin Roles.

6a. Answer Questions & Click Submit

The screenshot shows the 'Check In Visitors' interface for a visitor named 'Test Testerson'. The 'Check In Actions' menu on the left has 'Additional Information' highlighted with a green box and a red arrow. The 'Additional Information' section on the right is also highlighted with a green box and a red arrow. The form fields include:

- First Name: Test
- Last Name: Testerson
- Date of Birth: 11/17/2022
- Company: [Empty]
- Visitor Type: Visitor
- Country: [Empty]
- Contact Information: Email: test@test.com
- Escort Name: SS User
- Escort Name: Outpatient Visitor with photo
- Confirmation No.: 3963966
- Assistance Required?: Yes [] No [x]
- Wi-Fi Required?: [Empty]
- NDA: [Empty]
- ID Information: Scanning Device: Honeywell Reader
- ID Type: [Empty]
- Number: [Empty]

The screenshot shows the 'Additional Information' modal form. The form has a green border and a red arrow pointing to the 'SUBMIT' button. The form fields include:

- TEST
- Select [Dropdown]

Visitors - Check In: Pre-Registered Check In Workflow

7. Review Watchlist Details

If a green checkmark is present, you may skip this step.

The screenshot shows the 'Check In Visitors' interface. The 'Check In Actions' menu is open, and the 'Watchlist' option is highlighted with a green box and a red arrow. The 'Watchlist' tab shows a red exclamation mark icon. The visitor's name is 'Test Testerson'. The 'Check In' button is visible at the bottom right of the form.

7a. Review Details, Enter Notes, and Override/Deny

'Deny Check In' will not allow the visitor to check in.
'Override' will allow the visitor to check in.

The dialog box titled '2 Matches For Bad Person' contains the following text: 'Reported By : The visitor with name 'Bad Person' has been matched in **SAFE WatchList** with a listed identity with name Bad Person. The reason for this match is 'First Name & Last Name Like And matched'. The Watchlist Reason is 'NA'. Below this is a 'NOTES' field with the text 'This person is not bad - Really!!'. At the bottom, there are three buttons: 'CANCEL', 'DENY CHECK IN', and 'OVERRIDE'. A red arrow points to the 'OVERRIDE' button.

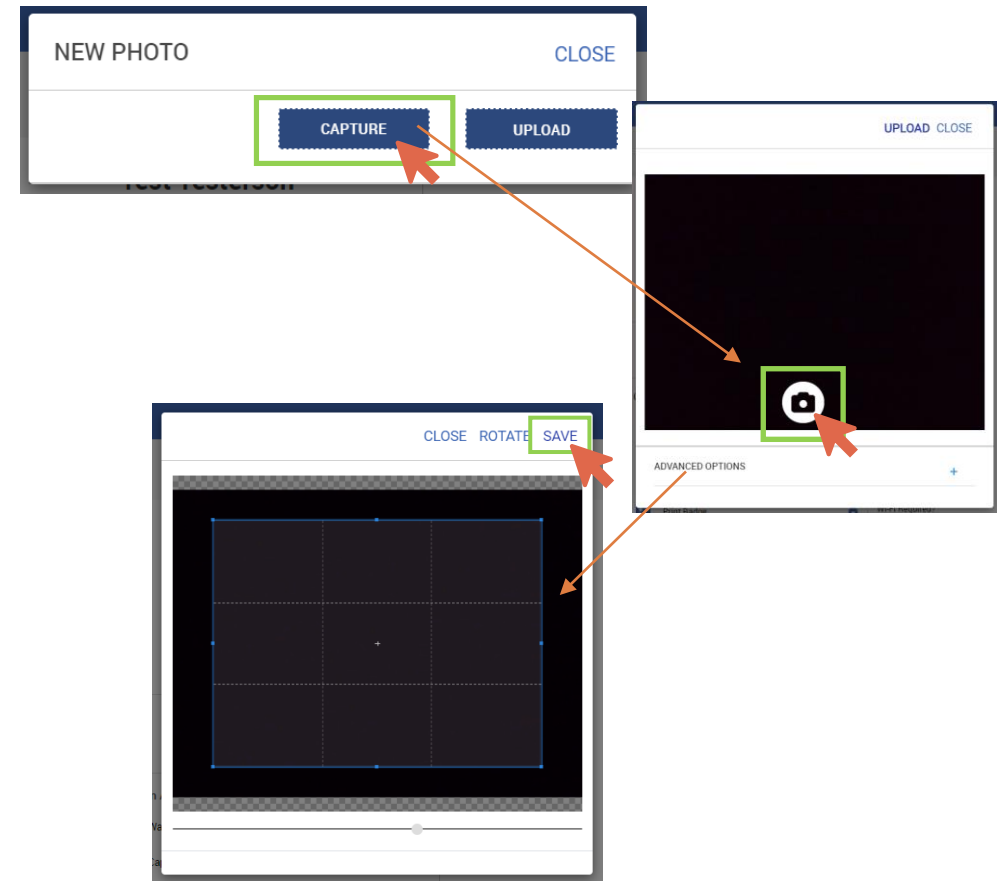
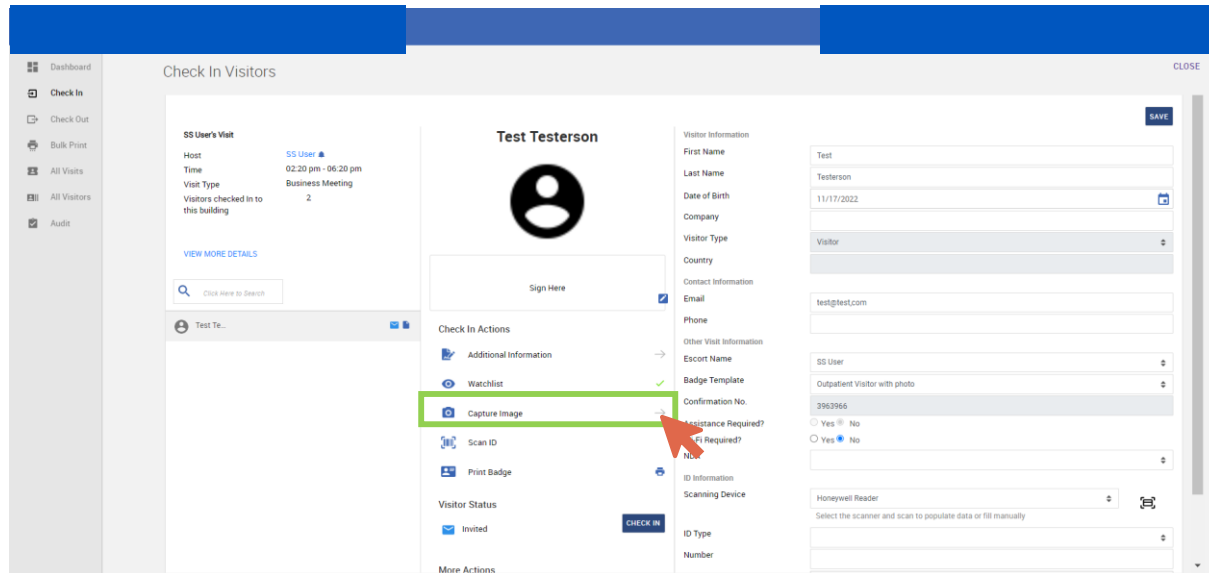
Visitors - Check In: Pre-Registered Check In Workflow

8. Capture Image

Capture as needed.

8a. Click Capture, Click Camera Icon, and Click Save

If you wish, you can resize the photo before you save the image.



Visitors - Check In: Pre-Registered Check In Workflow

9. Scan ID

Capture as needed.

9a. Select Scanning Device, Select ID Type, then Scan

Click 'Accept' to accept the scan.
Scanning IDs will fill out ID Information section.

The screenshot shows the 'Check In Visitors' interface for a user named 'Test Testerson'. The interface is divided into several sections:

- SS User's Visit:** Host (SS User), Time (02:20 pm - 06:20 pm), Visit Type (Business Meeting), Visitors checked in to this building (2).
- Check In Actions:** Additional Information, Watchlist, Capture Image, Scan ID (highlighted with a green box and a red arrow), Print Badge, Visitor Status (Invited).
- Visitor Information:** First Name (Test), Last Name (Testerson), Date of Birth (11/17/2022), Company, Visitor Type (Visitor), Country, Contact Information (Email: test@test.com, Phone), Other Visit Information (Escort Name: SS User, Escort Name: Outpatient Visitor with photo, Confirmation No.: 3963966, Assistance Required?: No, Wi-Fi Required?: No), Scanning Device (Honeywell Reader), ID Type, Number.

The screenshot shows the 'ID Information' and 'ID Scan' forms. The 'ID Information' form has the following fields:

- Scanning Device: Select the scanner and scan to populate data or fill manually (highlighted with a green box and a red arrow).
- ID Type: Driving License (highlighted with a green box and a red arrow).
- Expiration Date: [Empty field]
- Issuing Country: Select
- Issuing State: Select
- Card Information: [Empty field]
- Card Number: [Empty field]
- Badge Template: Visitor Badge Template
- Access Template: Day Access

The 'ID Scan' form shows a scan of a 'UNITED STATES OF AMERICA PASSPORT CARD EXEMPLAR' with the following fields:

- Authentication: Passed
- Name: Happy Traveler
- DOB: 1-Jan-81
- Identifier No: 123456789
- Issuing State/Country: United States
- Issued Date: 18-Feb-2011
- Expiration Date: 17-Feb-2021

Buttons at the bottom: RE-SCAN, ACCEPT (highlighted with a green box and a red arrow), CANCEL.

Visitors - Check In: Pre-Registered Check In Workflow

10. Review Visitor & Contact Information

Edit as needed. Grayed-out fields cannot be updated.

SS User's Visit
Host: SS User
Time: 02:20 pm - 06:20 pm
Visit Type: Business Meeting
Visitors checked in to this building: 2

Test Testerson

Visitor Information

First Name	Test
Last Name	Testerson
Date of Birth	11/17/2022
Company	
Visitor Type	Visitor
Country	
Contact Information	
Email	test@test.com
Phone	

Other Visit Information

Escort Name	SS User
Badge Template	Outpatient Visitor with photo
Confirmation No.	3963966
Assistance Required?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Wi-Fi Required?	<input type="radio"/> Yes <input checked="" type="radio"/> No
NDA	
ID Information	
Scanning Device	Honeywell Reader
ID Type	
Number	

Check In Actions

- Additional Information
- Watchlist
- Capture Image
- Scan ID
- Print Badge

Visitor Status

- Invited

Sign Here [CHECK IN]

11. Confirm Other Visit Information

Confirm Escort Name, Badge Template, and if Wi-Fi or an NDA is Required.
Edit as needed. Grayed-out fields cannot be updated.

SS User's Visit
Host: SS User
Time: 02:20 pm - 06:20 pm
Visit Type: Business Meeting
Visitors checked in to this building: 2

Test Testerson

Visitor Information

First Name	Test
Last Name	Testerson
Date of Birth	11/17/2022
Company	
Visitor Type	Visitor
Country	
Contact Information	
Email	test@test.com
Phone	

Other Visit Information

Escort Name	SS User
Badge Template	Outpatient Visitor with photo
Confirmation No.	3963966
Assistance Required?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Wi-Fi Required?	<input type="radio"/> Yes <input checked="" type="radio"/> No
NDA	
Scanning Device	Honeywell Reader
ID Type	
Number	

Check In Actions

- Additional Information
- Watchlist
- Capture Image
- Scan ID
- Print Badge

Visitor Status

- Invited

Sign Here [CHECK IN]

Visitors - Check In: Pre-Registered Check In Workflow

12. Review ID Information

Enter/Edit as needed. Grayed-out fields cannot be updated.

The screenshot shows the 'Check In Visitors' interface for a visitor named 'Test Testerson'. The 'ID Information' section is highlighted with a green box, and a red arrow points to the 'Scanning Device' dropdown menu. The 'CHECK IN' button is visible at the bottom right of the form.

Section	Field	Value	
SS User's Visit	Host	SS User	
	Time	02:20 pm - 06:20 pm	
Visit Type	Visit Type	Business Meeting	
	Visitors checked in to this building	2	
Visitor Information	First Name	Test	
	Last Name	Testerson	
	Date of Birth	11/17/2022	
	Company		
	Visitor Type	Visitor	
	Country		
	Contact Information	Email	test@test.com
	Phone		
	Other Visit Information	Escort Name	SS User
	Badge Template	Outpatient Visitor with photo	
Confirmation No.	3963966		
Assistance Required?	Yes No		
Wi-Fi Required?	Yes No		
NDA			
ID Information	Scanning Device	Honeywell Reader	
	ID Type		
Number			

13. Click 'Save'

Only required if edits were made

The screenshot shows the 'Check In Visitors' interface for a visitor named 'Test Testerson'. A red arrow points to the 'SAVE' button in the top right corner of the form.

Section	Field	Value	
SS User's Visit	Host	SS User	
	Time	02:20 pm - 06:20 pm	
Visit Type	Visit Type	Business Meeting	
	Visitors checked in to this building	2	
Visitor Information	First Name	Test	
	Last Name	Testerson	
	Date of Birth	11/17/2022	
	Company		
	Visitor Type	Visitor	
	Country		
	Contact Information	Email	test@test.com
	Phone		
	Other Visit Information	Escort Name	SS User
	Badge Template	Outpatient Visitor with photo	
Confirmation No.	3963966		
Assistance Required?	Yes No		
Wi-Fi Required?	Yes No		
NDA			
ID Information	Scanning Device	Honeywell Reader	
	ID Type		
Number			

Visitors - Check In: Pre-Registered Check In Workflow

14. Print Badge

The screenshot shows the 'Check In Visitors' interface. On the left, there is a sidebar with navigation options: Dashboard, Check In, Check Out, Bulk Print, All Visits, All Visitors, and Audit. The main content area is titled 'Check In Visitors' and includes a 'CLOSE' button. It displays details for a visit by 'SS User' at 02:20 pm on 11/17/2022. The visitor's name is 'Test Testerson'. A 'Signs Here' section is present. The 'Check In Actions' menu is open, with 'Print Badge' highlighted by a green box and a red arrow. Other actions include 'Additional Information', 'Watchlist', 'Capture Image', 'Scan ID', and 'Device'. The 'Visitor Information' form is also visible, containing fields for First Name, Last Name, Date of Birth, Company, Visitor Type, Country, Contact Information (Email, Phone), Other Visit Information (Escort Name, Badge Template, Confirmation No.), Assistance Required?, Wi-Fi Required?, NDA, and ID Type.

14a. Click 'Print'

The screenshot shows the 'Print Preview' window. It displays a badge template for 'Test Testerson'. The badge includes the name 'Test Testerson', the SS User name 'SS User', the Conf No. '1882291', and the word 'ESCORTED'. A barcode is also visible. In the top right corner of the preview window, there are two buttons: 'PRINT' and 'CLOSE'. The 'PRINT' button is highlighted with a green box, and a red arrow points to it.

Visitors - Check In: Pre-Registered Check In Workflow

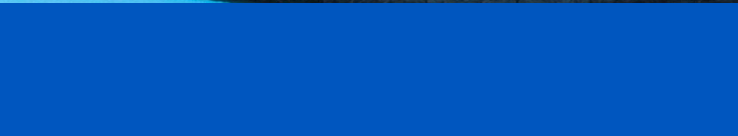
15. Click 'Check In'

The screenshot shows the 'Check In Visitors' interface for a visitor named 'Test Testerson'. The interface is divided into several sections: 'SS User's Visit' (Host: SS User, Time: 02:20 pm - 06:20 pm, Visit Type: Business Meeting, Visitors checked in to this building: 2), 'Check In Actions' (Additional Information, Watchlist, Capture Image, Scan ID, Print Badge), 'Visitor Status' (Invited), and 'Visitor Information' (First Name: Test, Last Name: Testerson, Date of Birth: 11/17/2022, Company, Visitor Type: Visitor, Country, Contact Information: Email: test@test.com, Phone, Other Visit Information: Escort Name: SS User, Badge Template: Outpatient Visitor with photo, Confirmation No.: 3963966, Assistance Required? (Yes/No), Wi-Fi Required? (Yes/No), NDA, ID Information: Scanning Device: Honeywell Reader). A red arrow points to the 'CHECK IN' button in the 'Visitor Status' section.

16. Click 'Close'

The screenshot shows the same 'Check In Visitors' interface as in step 15. A red arrow points to the 'CLOSE' button in the top right corner of the interface.

Done!



Thank you