

INTRODUCTION

The instructions and information contained in this document outline the steps necessary to use the *Visitor* application. This guide is designed to help facilitate your use of *Visitor*. It is recommended that you read this guide prior to using *Visitor* to gain adequate product knowledge.

The information contained in this guide is for Employee Users of *Visitor* and is intended for this user type only. The Employee User has the authority to perform the following functions:

- Schedule Visits
- View Scheduled Visits
- Edit / Delete Scheduled Visits
- Import a List of Names into *Visitor*

USER FUNCTIONS

GETTING STARTED

The first screen accessible through the *Visitor* link is the **LOG-IN** screen (Figure 1). Log in to *Visitor* using an authorized Employee user name and password (This will be supplied to you by your Administrator).

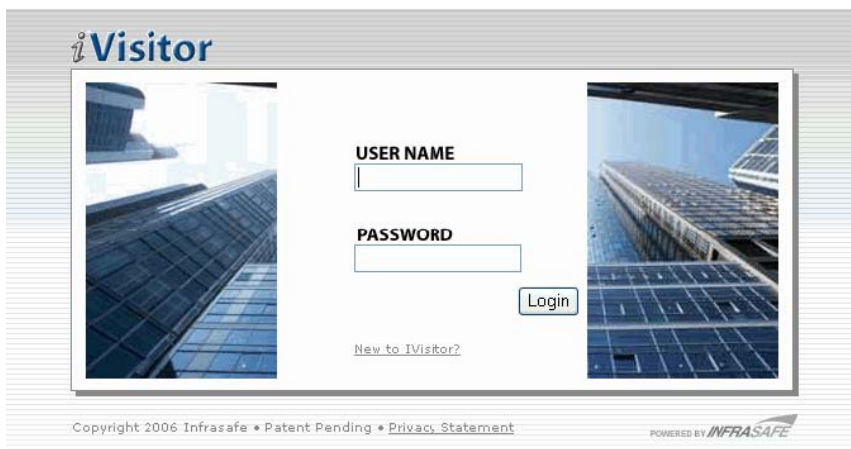


Figure 1

Upon log in, *Visitor* recognizes the user's USER TYPE and the proper page will be displayed for the User. The example shown below (Figure 2) shows the **MY VISITORS** page, standard for Employee Users. This is the "home page" for employees to use to view, schedule, and edit visitors.

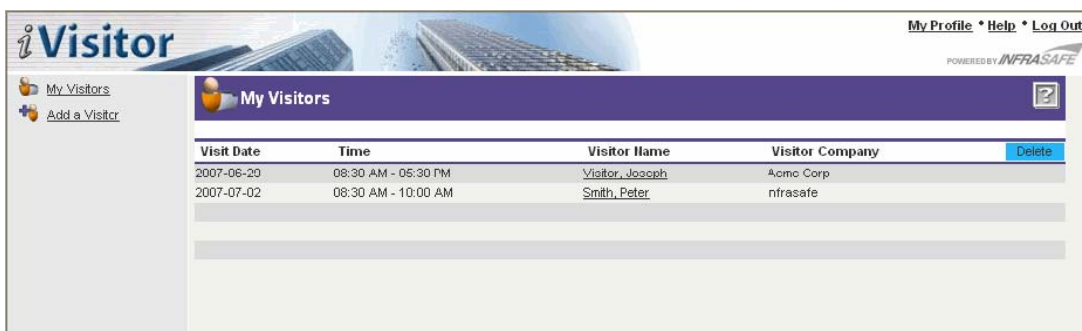


Figure 2

Schedule Visits

To schedule a visitor, click the “Add a Visitor” button at the left of the screen. This will display the “Add a Visitor” screen (Figure 3).

To add a visitor, enter the visitor’s first and last name, company name (if applicable). This information is used to identify visitors within the Visitor service and completes the top portion of the form.

At the bottom of the form, enter the purpose of the visit, the location of the visit, and the scheduled visit’s start time and date, and end time and date. Also indicate whether or not you’d like to receive an email alert when this visitor arrives at your location.

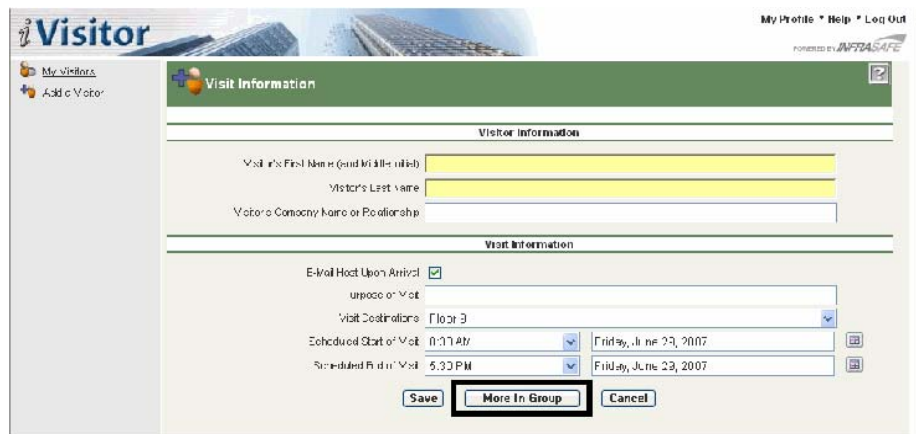


Figure 3

If you are scheduling more than one visitor for the same visit time and purpose, click on the *More in Group* button (Figure 4).

Enter the First Name, Last Name, and Company, for each visitor in this group.

When this information has been entered, click on *Save*. The *My Visitors* page will then be displayed with the new visitor(s) on the list.



Figure 4

More-in-Group / Large Group of Visitors

Overview

If you need to enter multiple visitors into *i*Visitor, the names can be typed into an Excel worksheet and then imported into *i*Visitor. **Note:** If a client or vendor is sending you a list of names, ask them to send it in Excel. You may have to format the list, but you will not have to re-type the names.

Creating a List of Names in Excel

Your list of visitors must be in an Excel worksheet and saved locally (i.e., the Desktop). If your list of names exists as a Word table, you can copy and paste the table to an Excel worksheet.

The Excel worksheet must follow these guidelines:

- The first name must be in the first column (column A).
- The last name must be in the second column (column B).
- The company name must be in the third column (column C).
- Delete any blank rows or columns in the data range.
- Do not include middle initials or middle names.
- If a name has an apostrophe or any other special character, type it without the apostrophe (i.e., O'hare is entered as Ohare).

	A	B	C
1	Sharon	Smith	ABC Co.
2	Julia	Ford	DEF Co.
3	Carla	Ohare	HJ Co.
4	Larry	Duke	KLM Co.
5	Janet	Jones	MNO Co.
6	Stanita	Gerson	PQR Co.
7	Charles	Lawson	STV Co.
8	Stacy	Field	WXY Co.

Figure 5

Saving the Excel File

- The Excel file must be saved as a CSV (comma separated values) file.
- **To save an Excel file with a .csv extension:**
- In Excel, select **File, Local Save As.**
- *The Save As dialog box displays.* (See figure at right)
- In the **File Name** box, type a name for the file.
- Click on **Desktop**, to save the file to the Desktop.
- In the **Save As Type** box, use the drop down arrow to select **CSV (Comma delimited) (*.csv)**.
- Click **Save**.

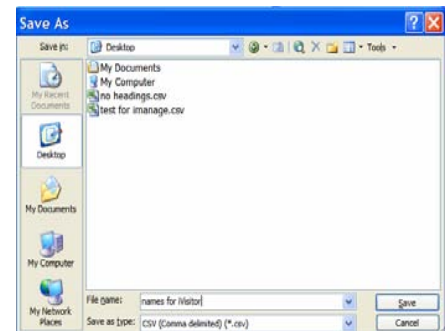


Figure 6

Importing the Names into Visitor

- Log in to Visitor.
- Click the **Add a Visitor** button

The Visit Information box displays.

Figure 7

- Complete the first name, last name and company for the first person on your list.
Note: This name will appear twice when you import the list, but one copy can be deleted.
- Click the **More in Group** button.
The More in Group box appears.
- Click **Browse** to locate the CSV file.
- Double click on the desired CSV file to map it to Visitor.

Figure 8

- Click **Done**.
A list of your visitors displays.

Visit Date	Time	Visitor Name	Visitor Company	Delete
2007-06-20	08:30 AM - 05:30 PM	Visitor, Joseph	Acme Corp	
2007-07-02	08:30 AM - 10:00 AM	Smith, Peter	infrasafe	

Figure 9

Deleting Duplicate Names

To delete a name:

- Click on the name.
The Visit Information appears.

Visitor Information

Visitor's First Name (and Middle Initial) [Joe]

Visitor's Last Name [Smith]

Visitor's Company Name or Relationship [Infrasafe_Advantor]

Visit Information

E-Mail Host Upon Arrival

Purpose of Visit [Development Meeting]

Visit Destinations [Floor 9]

Scheduled Start of Visit [8:30 AM] [Friday, June 29, 2007]

Scheduled End of Visit [5:30 PM] [Friday, June 29, 2007]

Save Delete Cancel

- Click **Delete**.
- Click **Save** to return to your list of names.

Figure 10

VIEWING AND MANAGING YOUR VISITOR LIST

After visitors have been added, they will appear on the *My Visitors* page. (Figure 11).

Each column header provides you the ability to sort the visitor list by clicking on the header. You can sort visitors by Date, Visitor's Name, or Company Name. Simply click on the header to sort the visitor information.

You can delete past visitors from the "My Visitors" page. To do this, place a check in the box under the "Delete" column. Click on "Delete" and the visitor(s) will be deleted from the page. **Note: This option is only available for past visitors. Current visitors and visitors scheduled for future dates cannot be deleted from this screen.**

Visit Date	Time	Visitor Name	Visitor Company	Delete
2007-06-12	01:00 PM - 02:30 PM	Doe, Jane	ABC Corporation	<input type="checkbox"/>
2007-06-29	08:30 AM - 05:30 PM	Smith, Joe	Infrasafe_Advantor	<input type="checkbox"/>
2007-06-29	08:30 AM - 05:30 PM	Visitor, Joseph	Acme Crp	<input type="checkbox"/>
2007-07-02	08:30 AM - 10:00 AM	Smith, Peter	Infrasafe	<input type="checkbox"/>

Figure 11

Information about only those visitors who are not currently checked in can be deleted or edited. To *edit* or *delete* a record, click on the visitor's name shown in the Visitor's Name column. This will access the **EDIT VISITOR** page (Figure 12). Edit or delete the Visitor information as necessary. Be sure to click *Save* after you have updated the information. To exit without saving, click on *Cancel*.

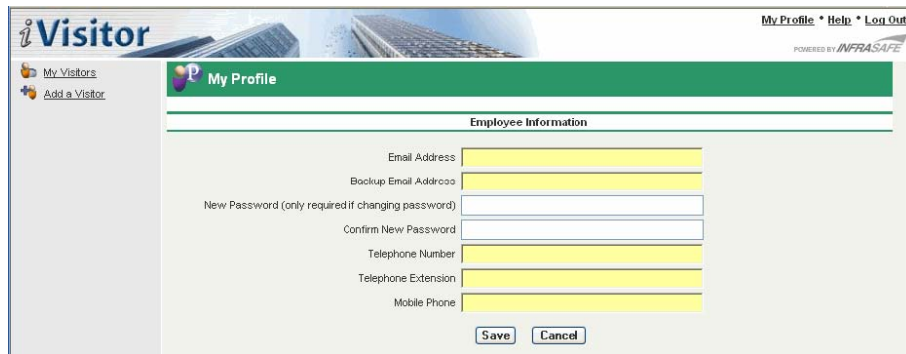
The screenshot shows the 'Visit Information' form in the Visitor management system. The form is divided into two sections: 'Visitor Information' and 'Visit Information'. The 'Visitor Information' section contains three text input fields: 'Visitor's First Name (and Middle Initial)' with the value 'Joe', 'Visitor's Last Name' with the value 'Smith', and 'Visitor's Company Name or Relationship' with the value 'Infrasafe_Avantor'. The 'Visit Information' section contains several fields: a checked checkbox for 'E-Mail Host Upon Arrival', a text input for 'Purpose of Visit' with the value 'Development Meeting', a dropdown for 'Visit Destinations' with the value 'Floor 9', and two date-time pickers for 'Scheduled Start of Visit' (8:30 AM, Friday, June 29, 2007) and 'Scheduled End of Visit' (5:30 PM, Friday, June 29, 2007). At the bottom of the form are three buttons: 'Save', 'Delete', and 'Cancel'. The top of the page features the 'Visitor' logo, navigation links for 'My Profile', 'Help', and 'Log Out', and a 'POWERED BY INFRA SAFE' logo.

Figure 12

The “My Profile” page allows users to change their *Visitor* Login password. This page also allows users to update their telephone / pager contact information.

- 1 From the My Visitors screen, click on **MY PROFILE** to access the *My Profile* page (Figure 13).
- 2 From this screen, make any desired changes to your profile (New Password, Telephone Number, etc.). The address entered in the Email Address and Backup Email Address fields are the Email address(es) where visitor check-in notifications are sent.
- 3 When you are done making changes, be sure to click on “Save” so the changes are saved in the *Visitor* database.

NOTE: If you changed your password, be sure to enter the new password the next time you log into *Visitor*.



The screenshot shows the 'My Profile' page in the Visitor system. The page has a green header with the 'Visitor' logo and 'My Profile * Help * Log Out' links. Below the header, there is a sidebar with 'My Visitors' and 'Add a Visitor' links. The main content area is titled 'Employee Information' and contains the following fields:

- Email Address
- Backup Email Address
- New Password (only required if changing password)
- Confirm New Password
- Telephone Number
- Telephone Extension
- Mobile Phone

At the bottom of the form, there are 'Save' and 'Cancel' buttons.

Figure 13