



# Visitor Module User Guide

# Table of Contents

1.	Application Layout .....	5
1.1.	Main Menu.....	5
1.2.	Submenu .....	5
1.3.	Status Bar .....	6
1.4.	Main Panel .....	6
1.5.	Tab Panel.....	7
1.6.	Infotypes Panel .....	7
1.7.	Records List .....	8
1.8.	Details Panel.....	8
2.	Visit Panel (Receptionist) .....	9
2.1.	Active Visits .....	10
2.1.1.	Create Visit .....	11
2.1.2.	Close Visit.....	24
2.1.3.	Modify Visit/Visitor Information.....	25
2.1.4.	Print Visit Report.....	26
2.1.5.	Blacklist Visitor .....	27
2.2.	Scheduled Visits .....	28
2.2.1.	Create Scheduled Visit .....	29
2.2.2.	Activate Scheduled Visit.....	31
2.2.3.	Modify Scheduled Visit .....	32
3.	Configuration – Administrator .....	33
3.1.	Reception Administration .....	33
3.1.1.	Create Reception.....	33
3.1.2.	Archive Reception .....	34
3.1.3.	Restore Reception.....	35
3.2.	Settings.....	36
3.2.1.	Multi Receptions .....	36
3.2.2.	Scheduled Visits .....	38
3.2.3.	Black List.....	38
3.2.4.	Extended Reception Info.....	39

3.2.5. Signature Reader.....	39
3.2.6. Fingerprint Reader .....	40
3.2.7. PID Reader.....	41
3.2.8. Badge .....	41
3.2.9. Credentials .....	42
3.2.10. Application Window.....	43
3.2.11. Fields .....	44
3.2.12. Checkout Strategy.....	46
3.2.13. Unclosed Visits .....	48
3.2.14. Additional Scheduled Visit Settings .....	49
3.2.15. Additional Fingerprint Settings .....	49
3.3. Credentials .....	51
3.3.1. Assigning Cards To Reception .....	52
3.3.2. Unassigning Credentials from Reception.....	52
3.3.3. Generating New Cards .....	53
3.3.4. Moving Cards .....	54
3.3.5. Status of Card.....	55
3.4. Corridors .....	56
3.4.1. Add Existing Corridor from C4 (Access Level) .....	57
3.4.2. Create New Corridor .....	58
3.4.3. Modify Corridor.....	59
3.4.4. Remove Corridor .....	60
4. Management – Reception Manager .....	61
4.1. Reports.....	62
4.1.1. Filtering Reports.....	62
4.2. Analytics.....	67
4.2.1. Filtering Visit Activity of the Reception.....	67
4.2.2. Filtering Visit Activity Comparison of The Receptions .....	69
4.3. Documents.....	72
4.3.1. Create Document Template.....	73
4.3.2. Remove Document Template .....	76
4.3.3. Modify Document Template .....	77
4.3.4. List of Document Templates and Document Preview .....	78

4.4.	Badges .....	79
4.4.1.	Create Badge Template.....	79
4.4.2.	Modify Badge Template.....	83
4.4.3.	Remove Badge Template .....	84
4.4.4.	Template Name and Badge Template Preview.....	84
4.5.	Credentials .....	86
4.5.1.	Assigning Cards To Reception .....	87
4.5.2.	Unassigning Credentials From Reception .....	88
4.5.3.	Generating New Cards .....	88
4.5.4.	Moving Cards .....	89
4.6.	Safety Training .....	90
4.6.1.	Granting Safety Training .....	91
4.6.2.	Removing Safety Training .....	93
4.6.3.	History Search .....	94
4.7.	Blacklist .....	95
4.7.1.	Filtering the Blacklist.....	96
4.7.2.	Modifying the Blacklist.....	96

# Preface

This manual is intended to educate the reader on usage of the *C4 Visitor Module*. This document contains comprehensive explanations of the application layout, features, and processes according to which section the user is working in.

## Scope of Manual

This manual refers to the *Visitor Module* for C4 2018.




## Related Documentation

Refer to the following documents:

- *C4 User Guide*

## Typographical Conventions

This manual uses certain notational and typographical conventions to make information more comprehensible and provides examples.

Item	Description
Application layout	Parts of the Application Layout, such as Panels, will be written in <i>italic</i> .
Buttons and menu items	Buttons and menu items are written in <b>bold</b> .
 Tips	Helpful information to explain how a certain function is used.
 Note	Notes alert you to information that may save you time and improve the user's experience.
 Warnings	Warnings are displayed to advise you that failure to take or avoid a specified action could result in a loss of data

# 1. Application Layout

The *Visitor Module* application consists of three main panels: *Visit*, *Configuration*, and *Management*. Each panel's visibility can be configured within the main C4 application and the given person's permissions.

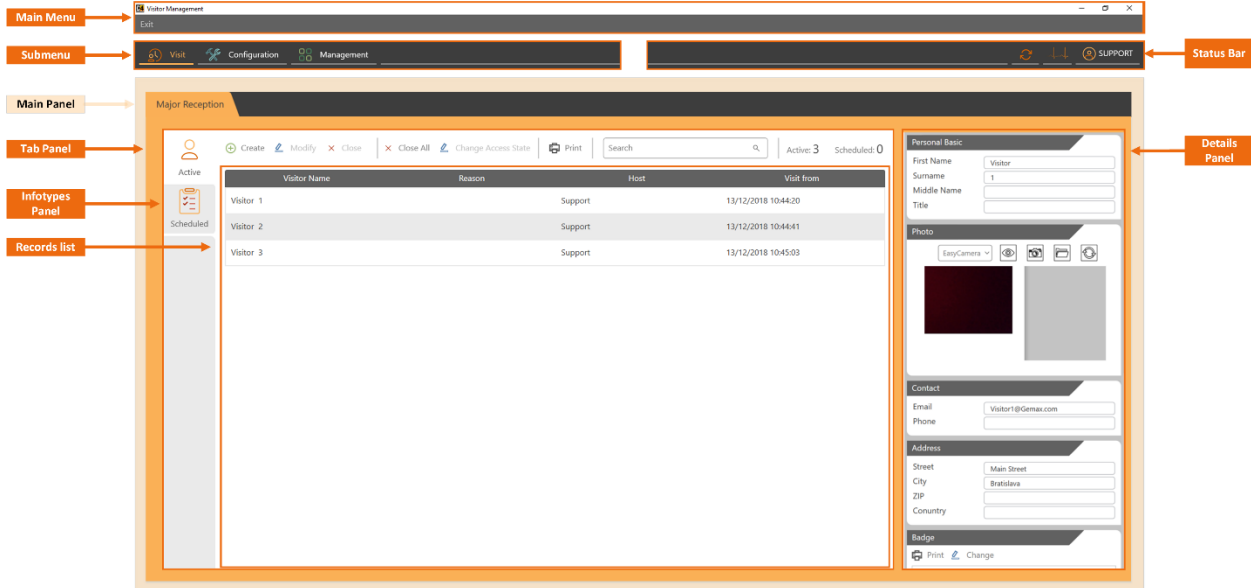


Figure 1 - Application layout

## 1.1. Main Menu

The main menu of the application provides the user with navigation through modules of the client application. As the client develops, this will include new tabs and pages.



Figure 2 - Main Menu

## 1.2. Submenu

The *Submenu* of the *Visitor Module* provides the user with the three main panels: *Visit*, *Configuration*, and *Management*. The panel in which a user is working in is underlined with the color of the icon associated with the panel. In the case of the image below, the current panel is *Visit*.

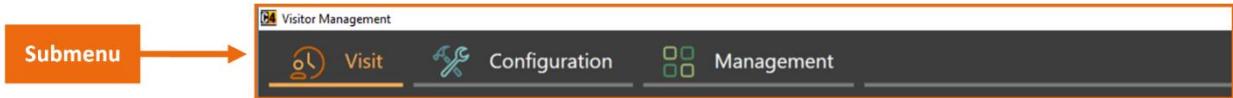


Figure 3 - Submenu

### 1.3. Status Bar

The *Status Bar* contains information on the client session and a refresh button. The first available button is the **Refresh button**. This is used to refresh the client upon executing changes in the *Configuration*. In the middle is the **Heart rate monitor**, which displays whether there is a connection to the C4 server. The far right corner displays the **Currently logged in user**. Upon clicking on the user name, it is possible to log out.



Figure 4 - Status Bar

### 1.4. Main Panel

Panel that a user is working in. In the image below, the panel would be *Visit*.

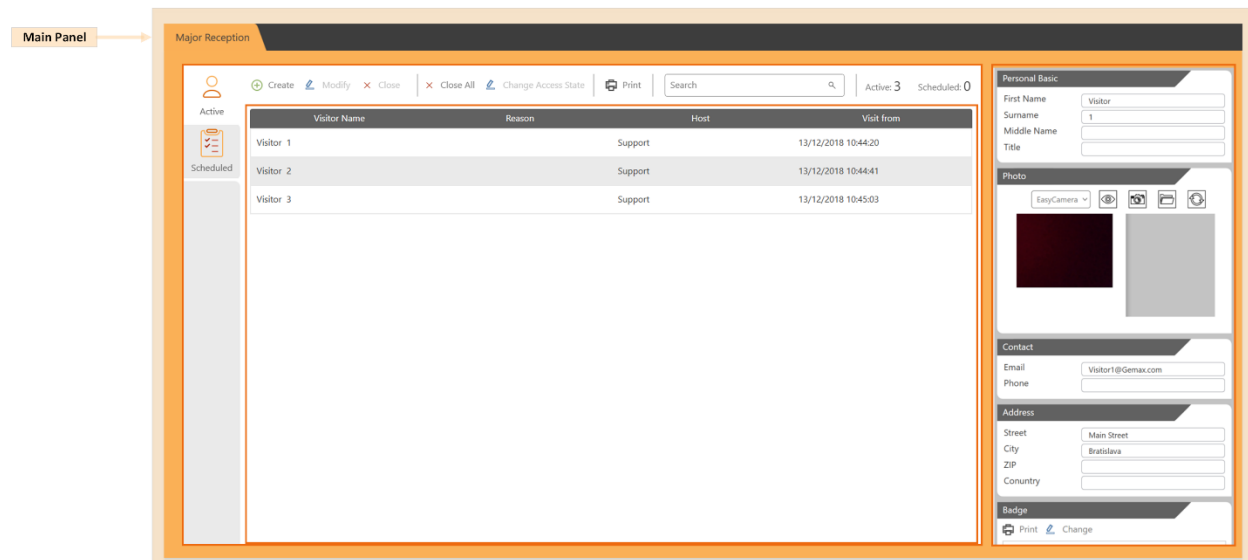


Figure 5 - Main Panel

## 1.5. Tab Panel

The *Tab Panel* provides tabs for a user to switch between certain objects, in the case of the image below, this would be receptions. The current reception tab the user is working in is **Major Reception**.

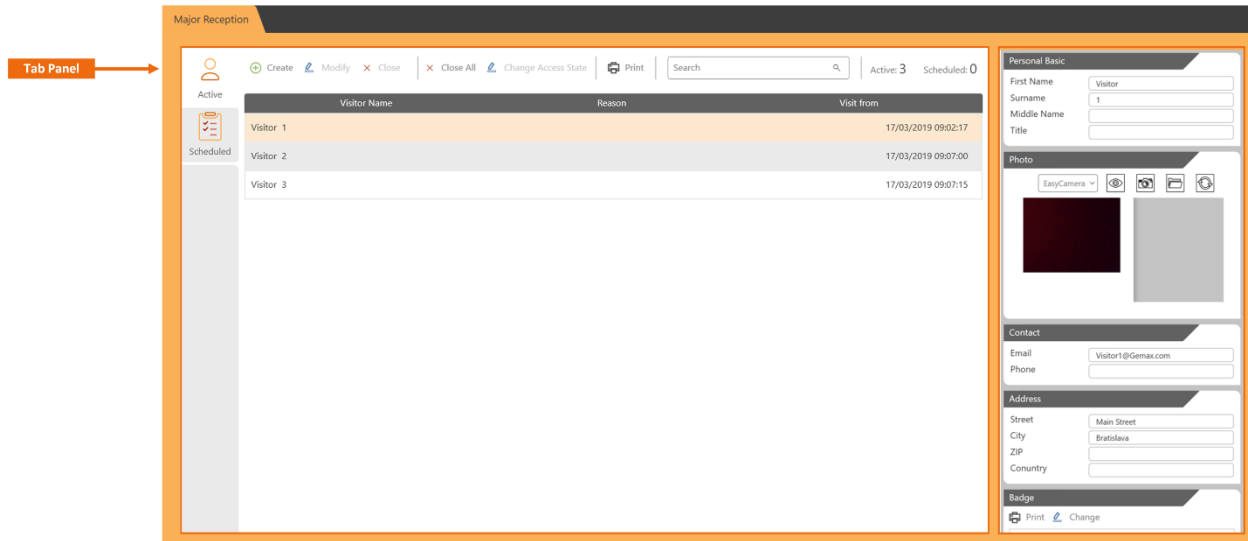


Figure 6 - Tab Panel

## 1.6. Infotypes Panel

The *Infotypes Panel* defines the type of information that is being worked within the selected *Tab Panel*, in the case of the image above, this would be *Active visits*.

The *Infotypes Panel* can contain a record list, as is seen in the image below, where it is the list of active visits.

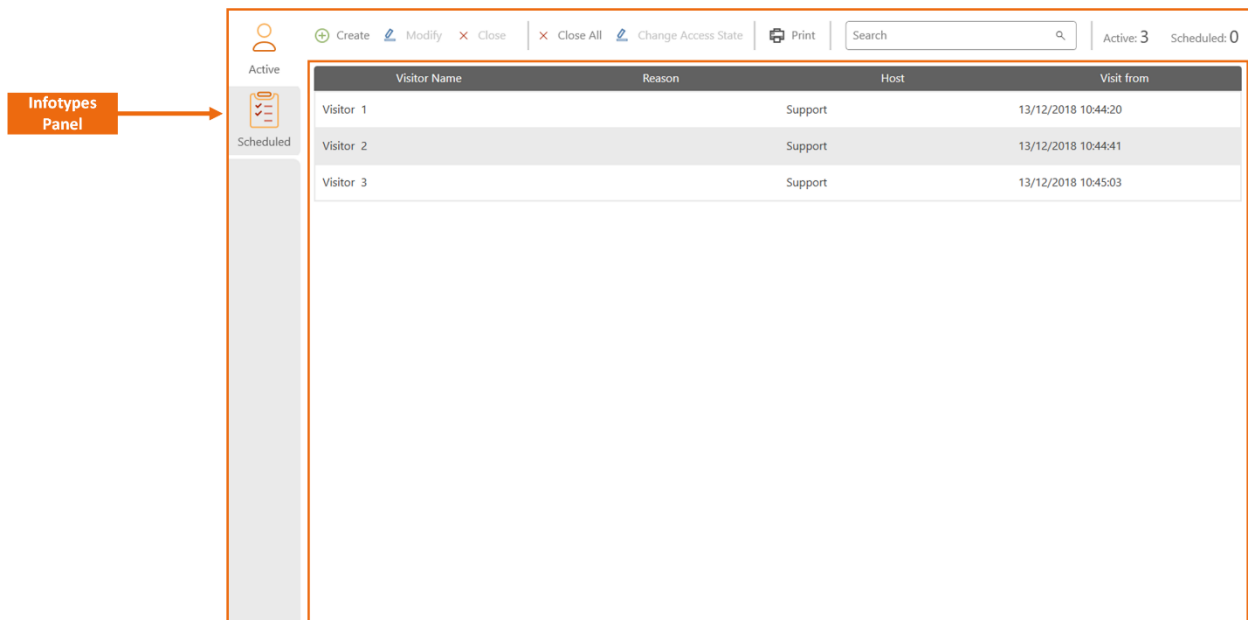


Figure 7 - Infotypes Panel



## 1.7. Records List

The *Records list* contains rows of data records according to the *Infotypes Panel* a user is working in. In the case of the image below, it is the *Records List* for *Active visits*. This list contains information about active visits.

Selecting an item from the *Records List* may display the *Details Panel* (see more below).

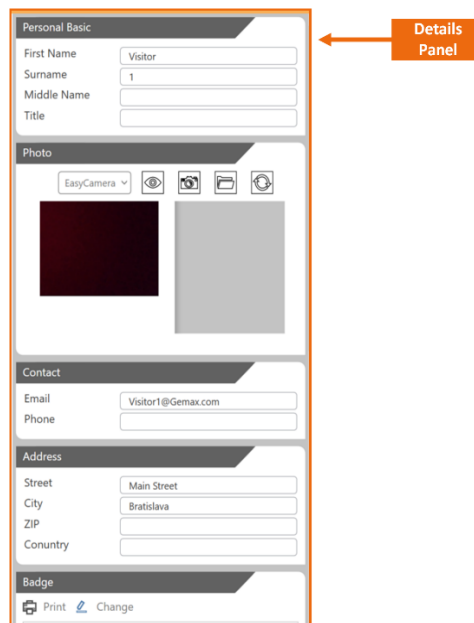


Visitor Name	Reason	Host	Visit from
Visitor 1		Support	13/12/2018 10:44:20
Visitor 2		Support	13/12/2018 10:44:41
Visitor 3		Support	13/12/2018 10:45:03

Figure 8 - Records list

## 1.8. Details Panel

If the *Details Panel* is available, it presents a user with details about the selected item from the record list. In the case of the image below, this would be details about the selected active visit.



Personal Basic

First Name

Surname

Middle Name

Title

Photo

EasyCamera

Contact

Email

Phone

Address

Street

City

ZIP

Conuntry

Badge

Figure 9 - Details Panel

## 2. Visit Panel (Receptionist)

The *Visit Panel* is intended for a receptionist, who will manage visits at a reception. The *Tab Panel* contains reception tabs, in which the receptionist can work. By default, if there is only one reception set in the configuration, it will be called “**Reception**”.



Figure 10 - Reception tabs

The *Infotypes Panel* on the left side of the screen provides the option of switching between *Active* and *Scheduled visits*. It also provides a record list of either the *Active* or *Scheduled visits*. Clicking on the record from the record list opens the *Details Panel* on the right side of the screen.

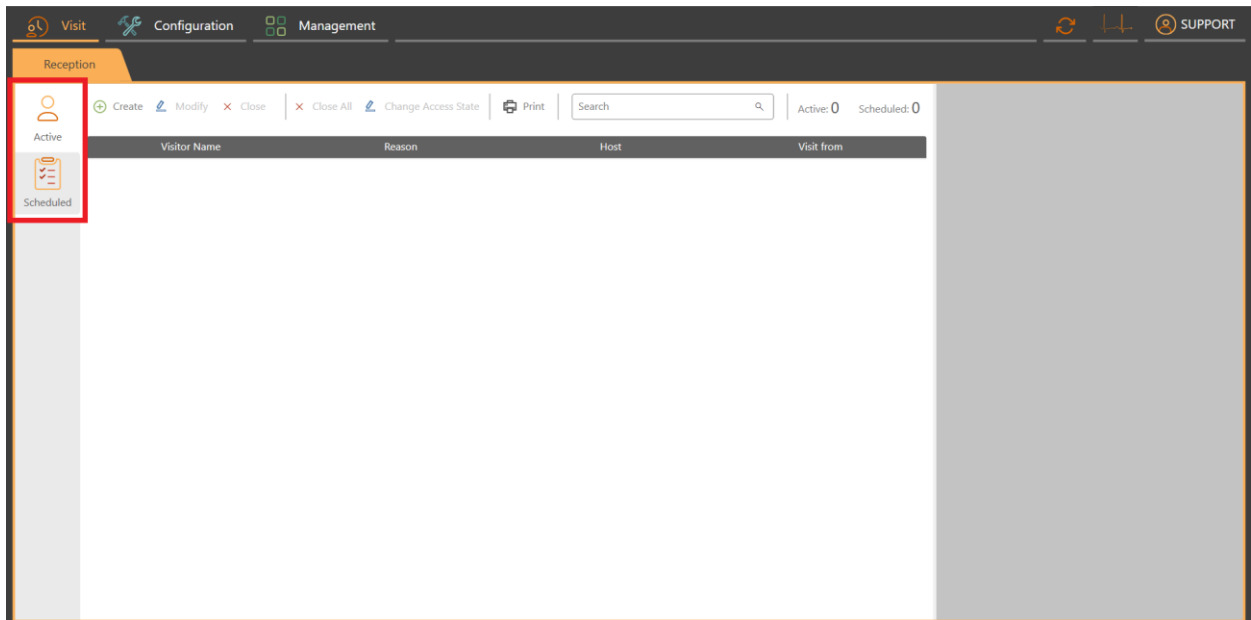


Figure 11 - Visit Infotypes Panel

Within the *Infotypes Panel*, above the record list, there is the **set of buttons**, **search bar**, and a **counter of active and scheduled visits**.

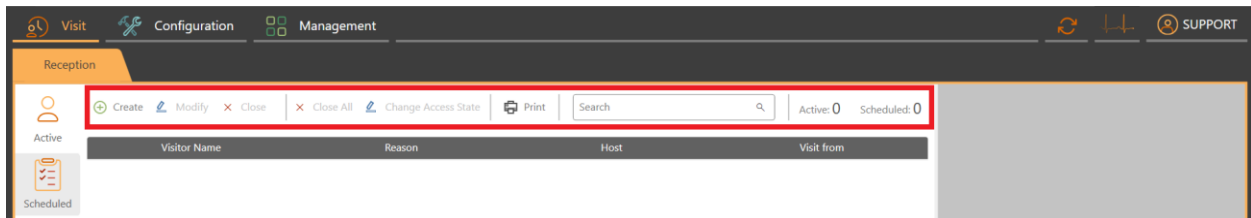


Figure 12 - Visit buttons

## 2.1. Active Visits

The *Active Visits Infotypes Panel* displays a *Records List* of active visits; visitors currently in the building.

The *Active Visits Panel* allows the receptionist to create visits, close visits, change a visitor's blacklist level, modify visit and visitor information, view detail information on a selected visit, and print a report on visits.

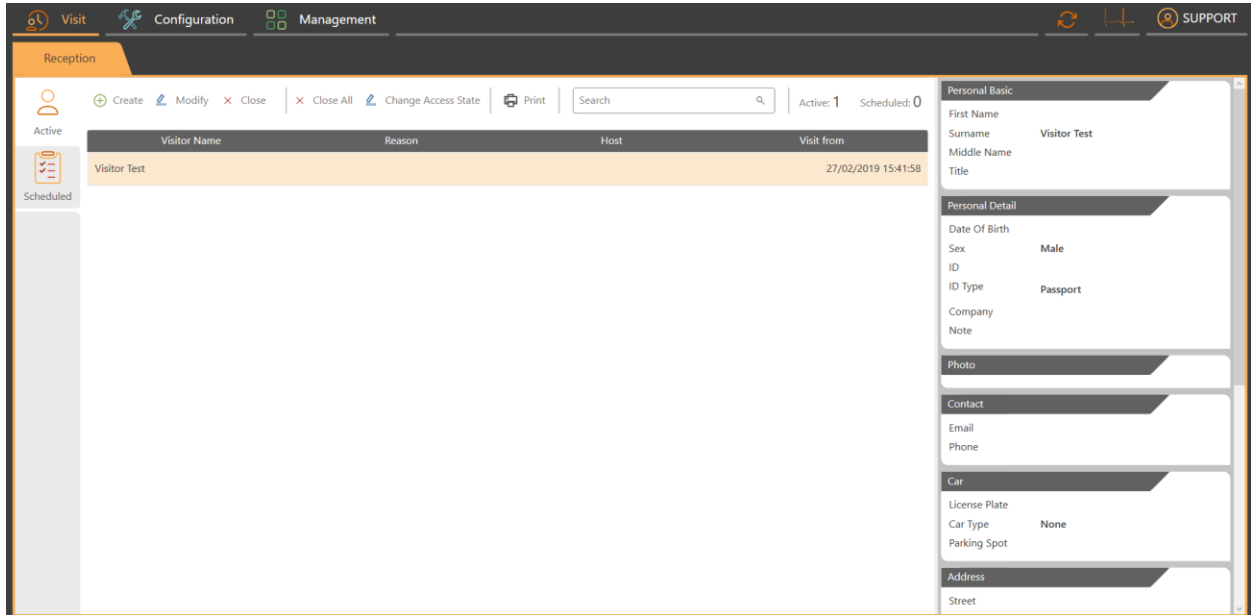


Figure 13 - Active Visits Panel

The buttons at the top of the *Infotypes Panel* allow the receptionist to carry out most functions. Clicking on the visit will display further information of the selected visit via the *Details Panel* on the right side of the screen.

### 2.1.1. Create Visit

To create a new visit, click the **+** **Create** button. The visit creation wizard will appear. The first step is to either search for an existing visitor in the system using the search bar or add a new visitor using the **+** **Add Visitor** button.

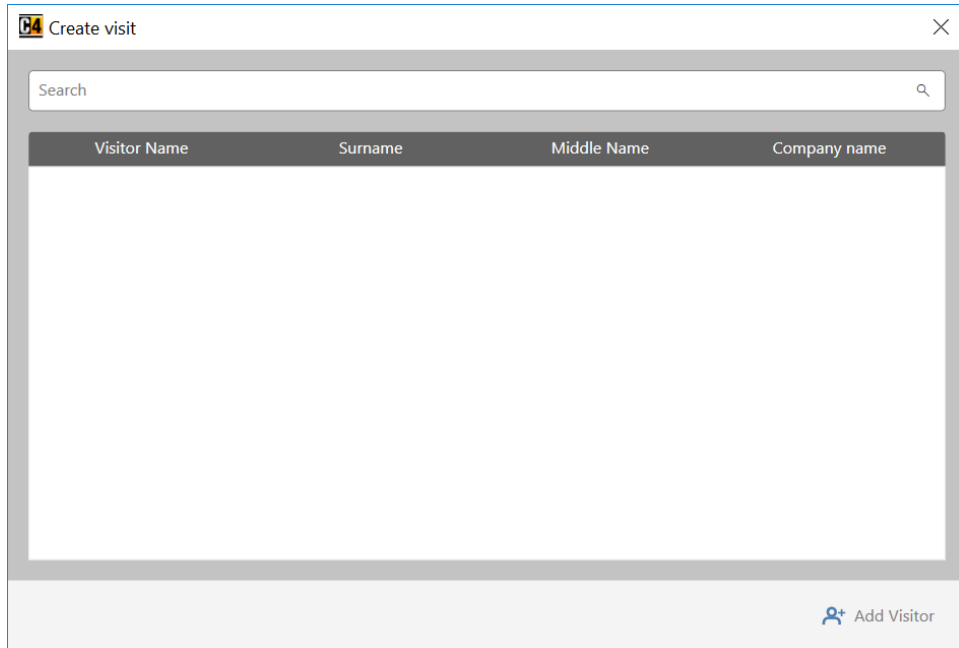


Figure 14 – Visit creation wizard

Using an existing visitor from the system will fill in their pre-entered information, and only information about the visit, such as **reason for visit**, will be prompted to a receptionist for filling in.

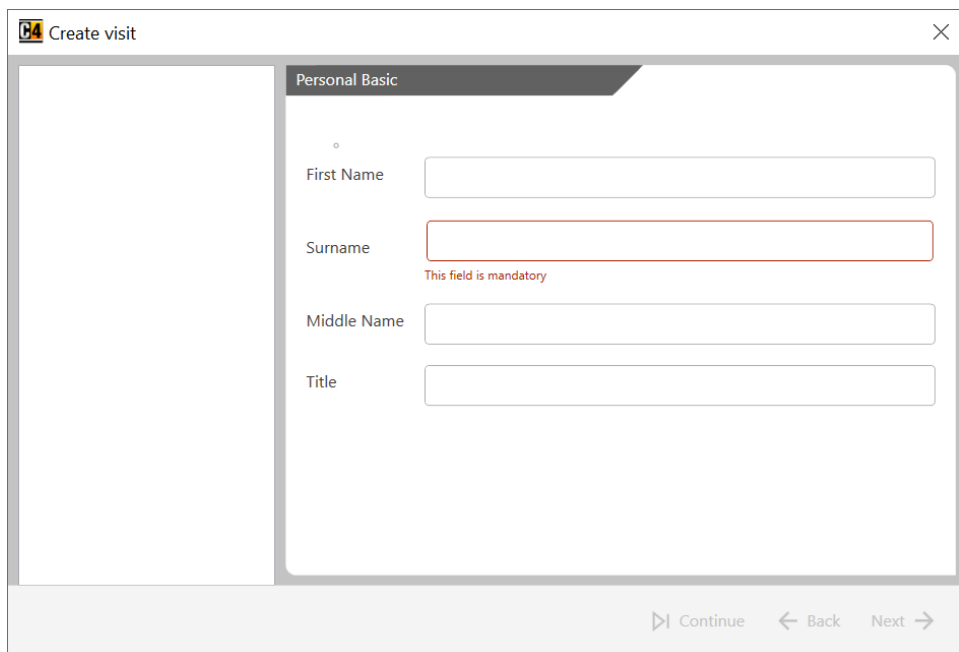


Figure 15 - Filling in visitor information

Upon clicking the **Add Visitor** button, the window will change and a receptionist can fill in information about the new visitor and their visit.

Filled-in information will be displayed on the left side of the window. It is possible to return and edit filled-in information by clicking on the info on the left side, or by clicking the **Back** button. To move on to the next information block, click the **Next** button.

The information to fill in varies according to what has been applied for the selected reception within the *Configuration Panel*.

Below are explanations and descriptions on the various information that can be filled in.

---

## Fingerprint Reader

In case your installation contains fingerprint devices to which you want to provide visitors with access, it is possible to register their fingerprint credentials during visit creation. To do so, connect a supported USB fingerprint reader to the client computer (see supported devices documentation)

To add a fingerprint, simply select the finger being scanned by clicking the corresponding fingertip and enroll the finger on the scanner. Scanning begins once the fingertip turns red and a red rotating circle appears around it. Scan progress is shown on the bottom left corner of the wizard.

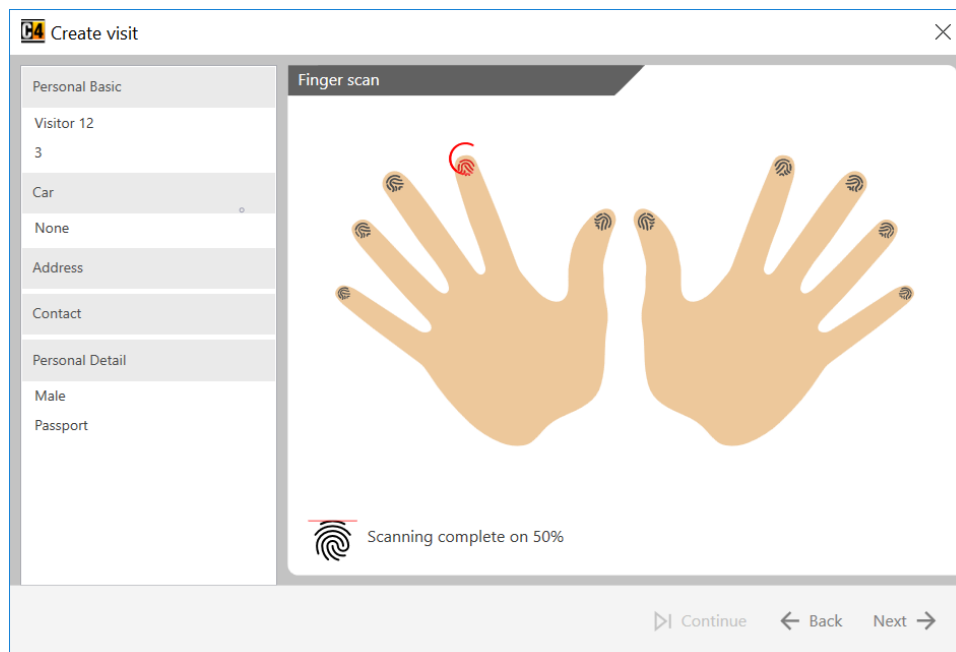


Figure 16 - Scanning Fingerprint

Once the fingerprint is successfully scanned, the corresponding fingertip will change color to green. Clicking the fingerprint will delete the existing scan and a new one can be registered.

## PID Reader

In case the reception has a PID Reader configured and connected (see supported devices documentation), it is possible to upload basic information from a person's PID. Depending on the device, simply swipe or scan the PID and the wizard will automatically enter this information.

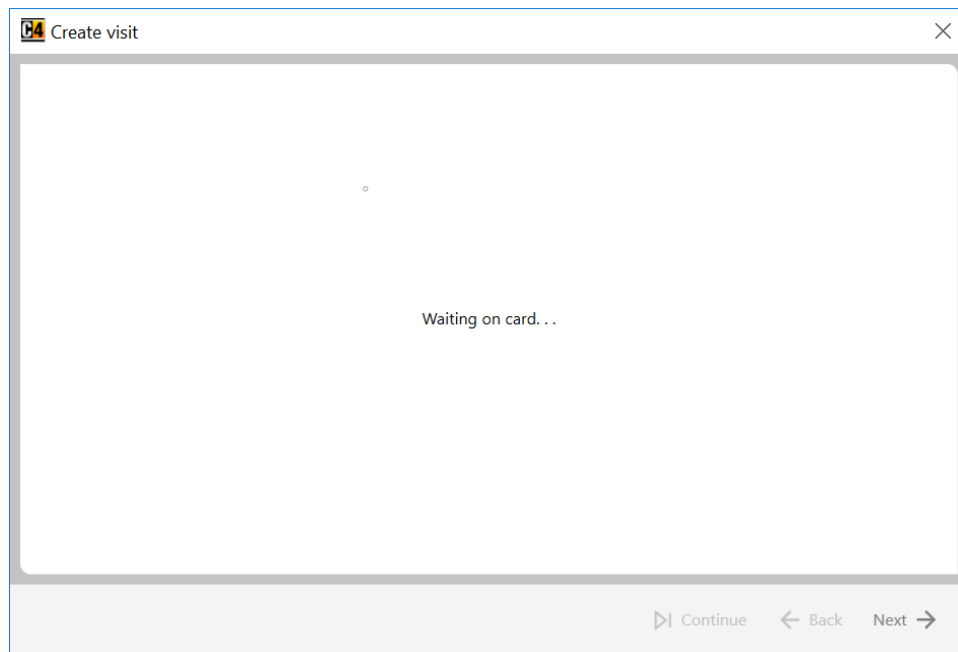


Figure 17 - Waiting for PID Scan

## Address

The **Address** should contain the visitor's address information.

The **Address** information block allows a receptionist to fill in the following fields of information:

Address	Description
<b>Street</b>	Street address
<b>City</b>	City
<b>ZIP</b>	Postal Code
<b>Country</b>	Country


## Personal Basic

**Personal Basic** information are the basic information fields for a visitor.

The **Personal Basic** information block allows a receptionist to fill in the following fields of information:

Personal Basic	Description
<b>First Name</b>	Visitor's first name
<b>Surname</b>	Visitor's surname
<b>Middle Name</b>	Visitor's middle name
<b>Title</b>	Visitor's title (Mr., Mrs., Ms., Dr., PhD. etc.)

---

 **Warning:** Surname is the only required field!

---

## Comments

The **Comments** should contain information about the nature of the visit and any notes regarding the visit/visitor.

The **Comment** information block allows a receptionist to fill in the following fields of information:

Comments	Description
<b>Reason</b>	Reason for visit
<b>Notes</b>	Any extra information regarding the visit is entered in this field.

## Personal Detail

The **Personal Detail** information block allows a receptionist to fill in the following fields of information:

Personal Detail	Description
<b>Date of Birth</b>	Visitor's date of birth
<b>Sex</b>	Visitor's sex
<b>ID</b>	Identification document info provided by visitor
<b>ID Type</b>	Type of ID (Passport, ID, Driver license etc.)
<b>Company</b>	Company that the visitor is representing
<b>Note</b>	Note for the receptionist if needed.

## Contact

**Contact** information are necessary in case a receptionist needs to communicate with the visitor, or because of the internal policies

The **Contact** information block allows a receptionist to fill in the following fields of information:





Contact	Description
<b>Email</b>	Visitor's email address
<b>Phone</b>	Visitor's phone number



## Photo

It is possible to add a **Photo** of a visitor. Below is an image of how the **Photo** block looks like during creation of a new visitor.

The combo box allows a receptionist to select the camera they wish to use (USB webcam, built-in camera etc.).

-  **Preview:** Allows a user to preview the camera they have chosen.
-  **Snapshot:** Captures an image from the selected camera.
-  **Open:** Allows a receptionist to search their files for an image and assign it to a visitor.
-  **Refresh:** Refreshes the camera if necessary.

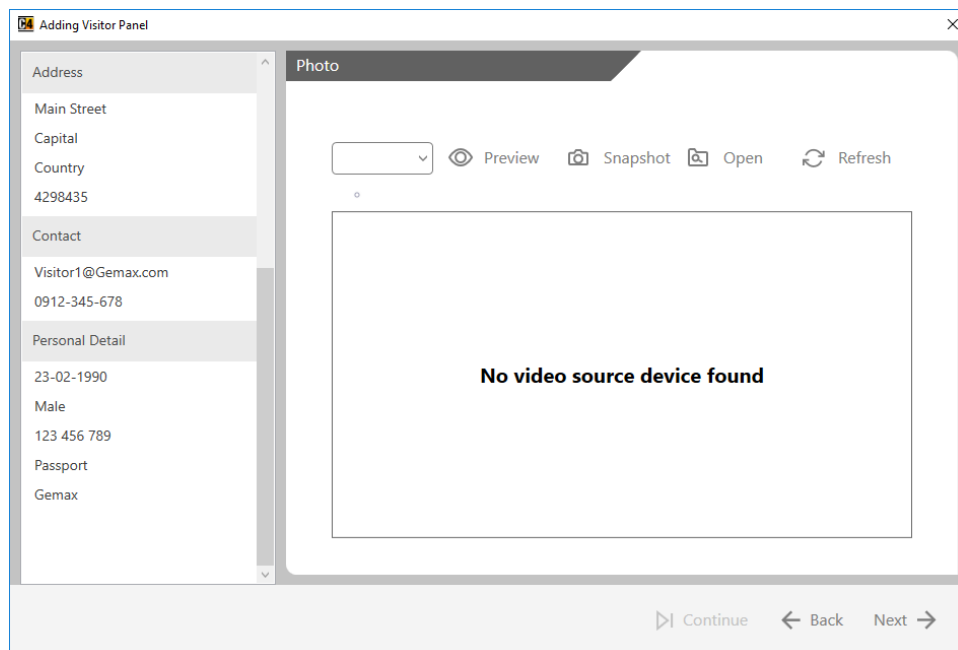


Figure 18 - Visitor photo

## Local Policies

A receptionist uses this section in the case there are Local Policies requiring a signature before entry. There are two ways Local Policies can be signed – Manually or Electronically (via Signature Reader).

### Local Policies Electronic

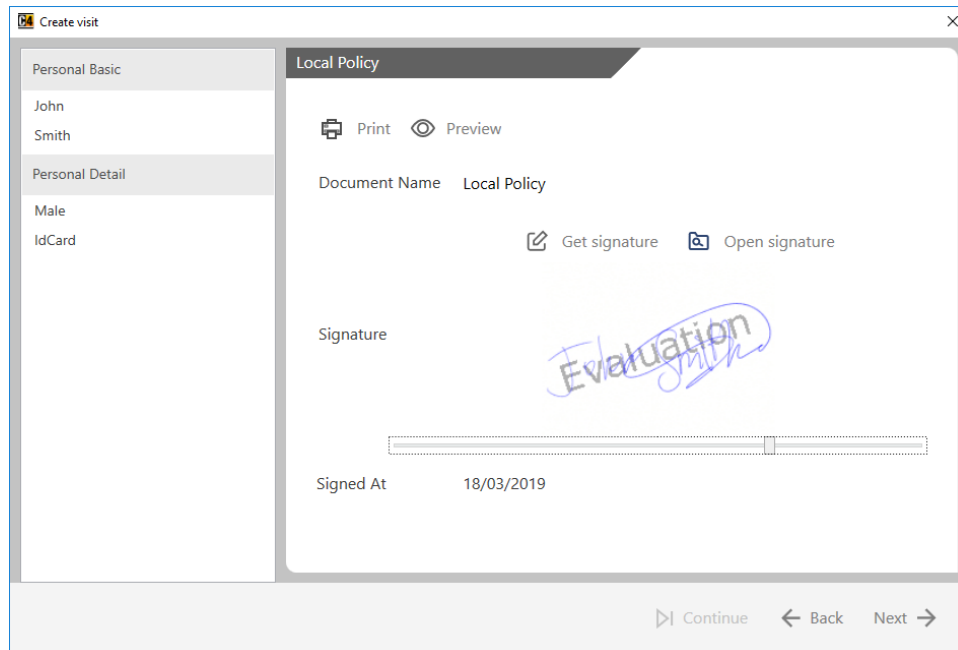





Figure 19 - Local Policies Electronic



A signature can be obtained using a signature reader device or importing an image file with the signature.

-  **Get Signature:** If a signature reader is connected, import signature.
-  **Open Signature:** An image file containing the signature can be imported from local files.

The size of a signature can be adjusted using the slider.

-  **Signature Size:** The slider is used to adjust the size of a signature to fit the document.

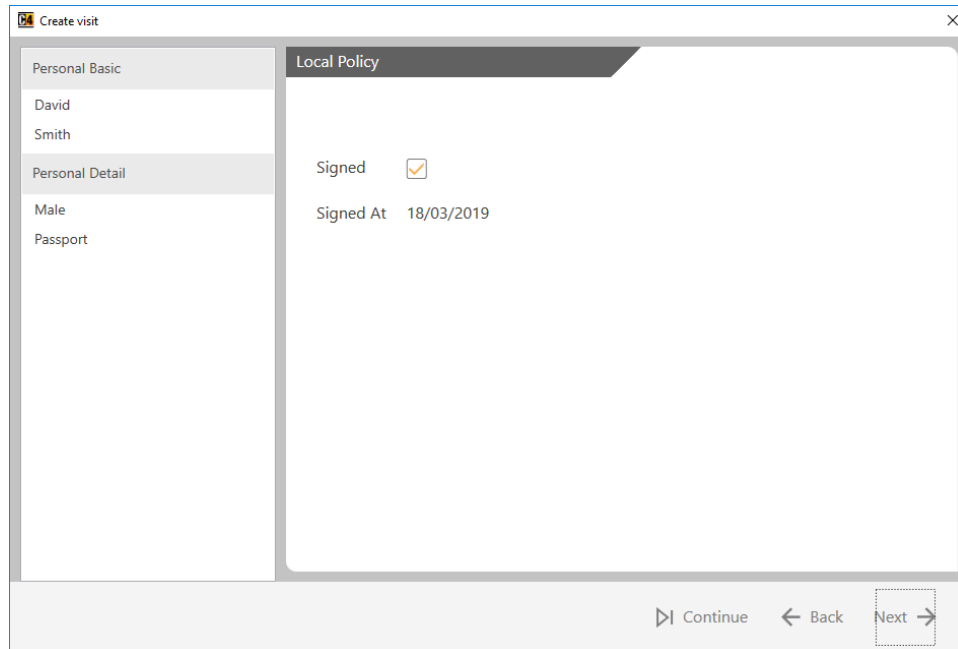
The document can be previewed and printed.

-  **Print:** Print the document.
-  **Preview:** Preview the document.

At the bottom of the wizard is information on when the document has been signed and when its validity expires.

## Local Policies Manual

In case the reception does not use a signature reader but rather has the person physically sign the Local Policy paper, simply check the **Signed** checkbox once the visitor signs the document and click the → **Next** button to continue.



The screenshot shows a software window titled "Create visit" with a sidebar on the left and a main content area on the right. The sidebar has two sections: "Personal Basic" with fields for "David" and "Smith", and "Personal Detail" with fields for "Male" and "Passport". The main content area is titled "Local Policy" and contains the following text:

Signed

Signed At 18/03/2019

At the bottom right of the window, there are three navigation buttons: "Continue" (with a play icon), "Back" (with a left arrow icon), and "Next" (with a right arrow icon). The "Next" button is highlighted with a dashed border.

Figure 20 - Local Policies Manual

## PIN

If a reception has **PIN** access configured, a visitor will have a PIN code generated. It is necessary to select the corridor for which access is being provided. This is done on the following page. Continue by clicking the → **Next** button.

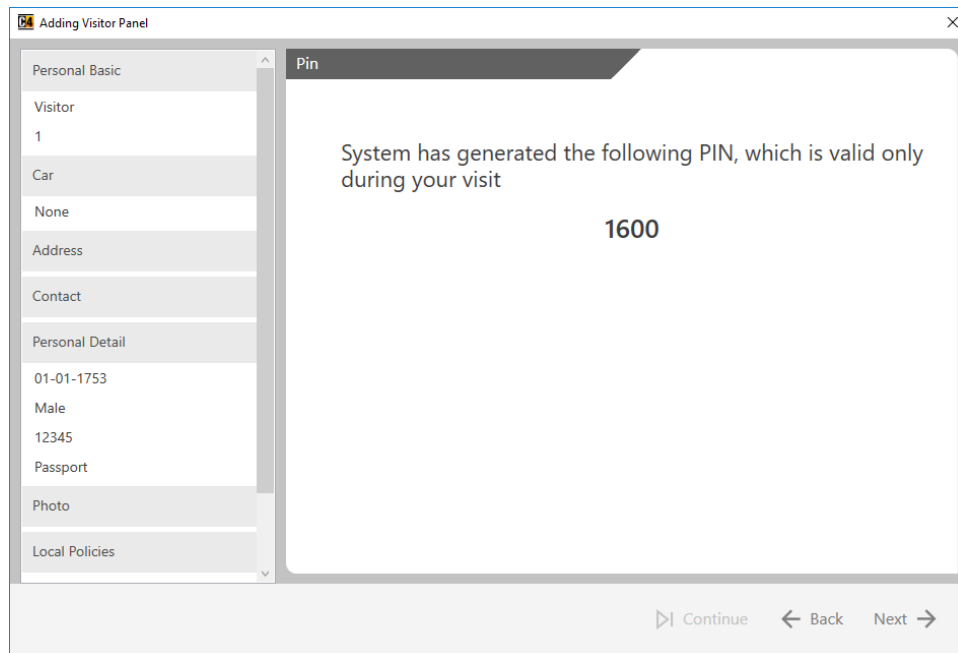


Figure 21 - PIN

## Badge

If a **Badge** template has been created, it will be displayed in this section.

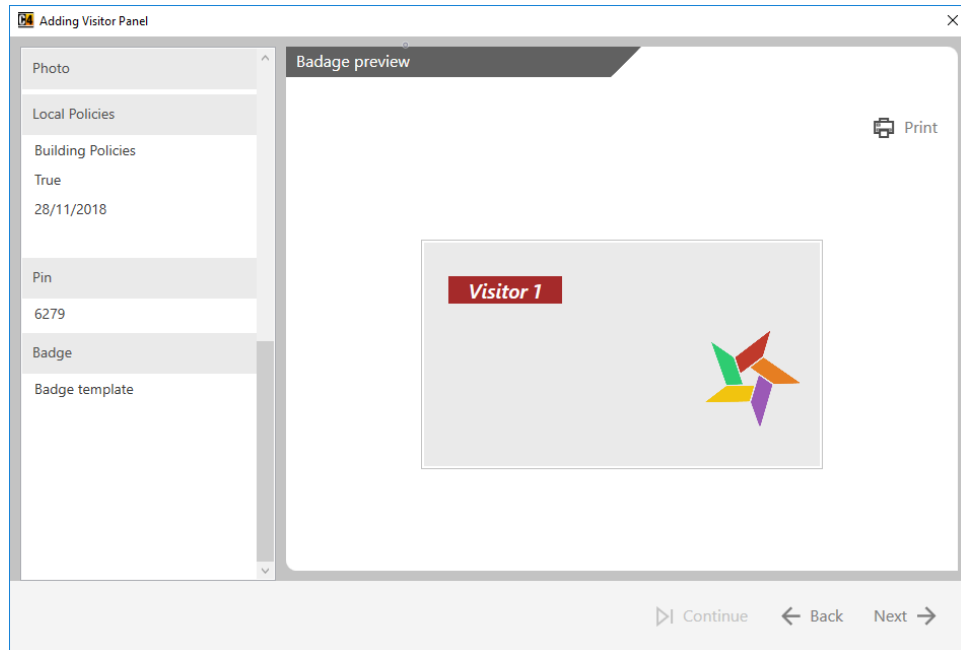



Figure 22 - Badge preview

From here, the badge can be printed by clicking the  **Print** button.

## Assign Card

To **Assign a card** to a visitor, select a card from the list of available cards. The search bar allows a receptionist to search for a card. Continue by clicking the **Next** button.

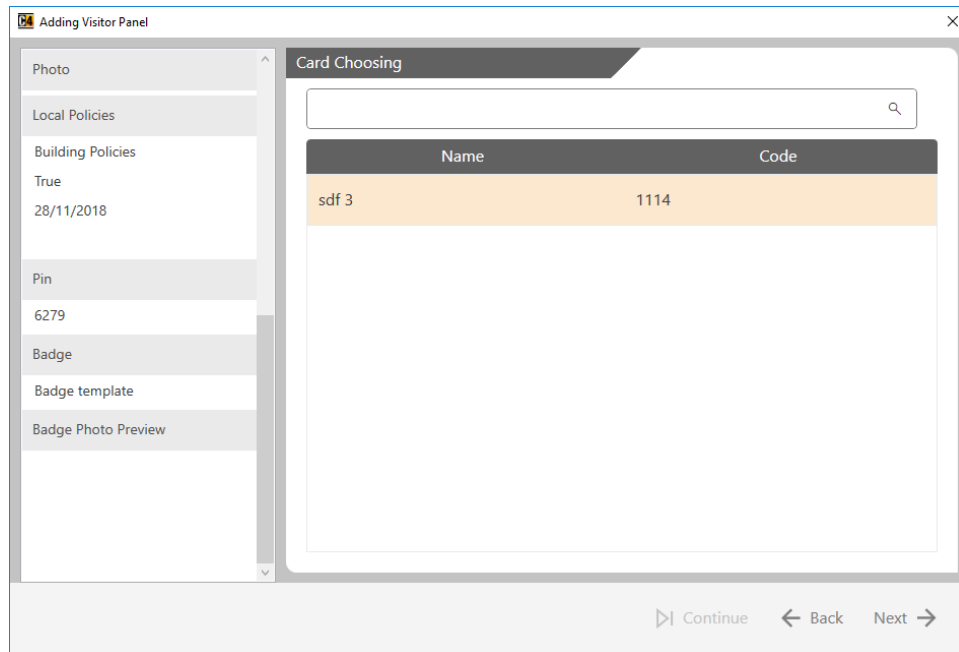


Figure 23 - Assign card

## Corridors

**Corridors** are a group of access points that can be assigned to a visitor. These access points allow a visitor to move around the building within the scope of access points included in the corridor. To assign a corridor to a visitor, select a corridor from the list of available corridors. The search bar allows a receptionist to search for a corridor. Continue to the next page by clicking the **Next** button.

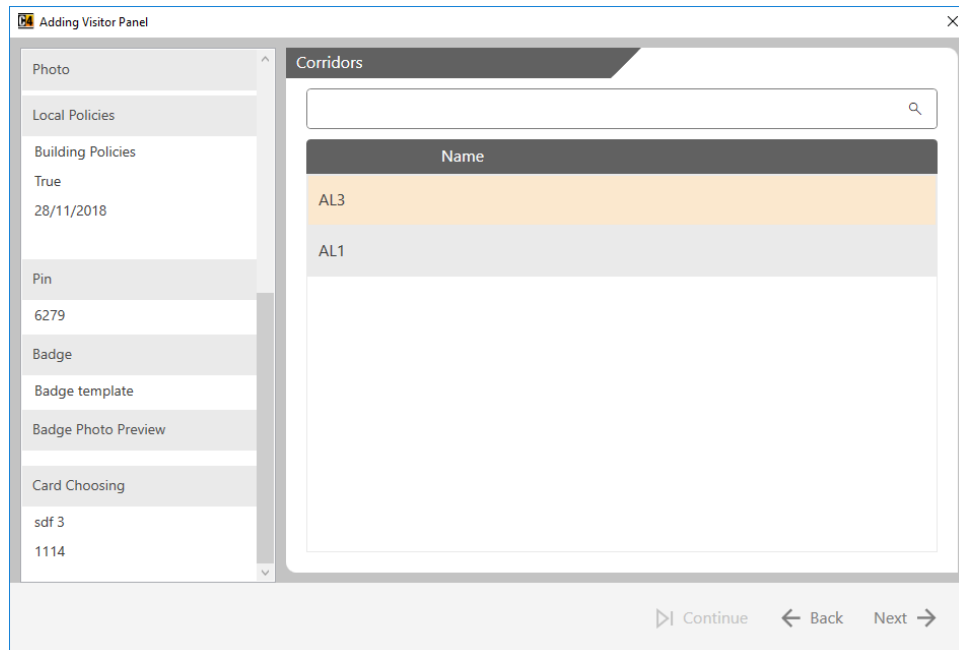


Figure 24 - Assigning corridor

## Host

It is possible to select the person being visited - the **Host**. The search bar allows a receptionist to search persons from the C4 system and select a person. Continue by clicking the **Next** button.

The screenshot shows a software interface titled "Adding Visitor Panel". On the left, there is a sidebar with several sections: "Address" (Main Street, Capital, United Kingdom, 532984), "Contact" (Visitor1@gemax.com, 0900-345-678), "Personal Detail" (23-02-1990, Male, 123456789), "Passport", "Gemax", and "Photo". The main area is titled "Visitee" and contains a search bar with a magnifying glass icon. Below the search bar is a table with two columns: "Visitee name" and "Company name". A single row is visible with the value "Support" under the "Visitee name" column. At the bottom of the interface, there are three navigation buttons: "Continue" (with a play icon), "Back" (with a left arrow icon), and "Next" (with a right arrow icon).

Figure 25 - Host



## 2.1.2. Close Visit

To close a visit, select a visit from the record list and click the **✗ Close** button. It is also possible to close all visits at once using the **✗ Close All** button.

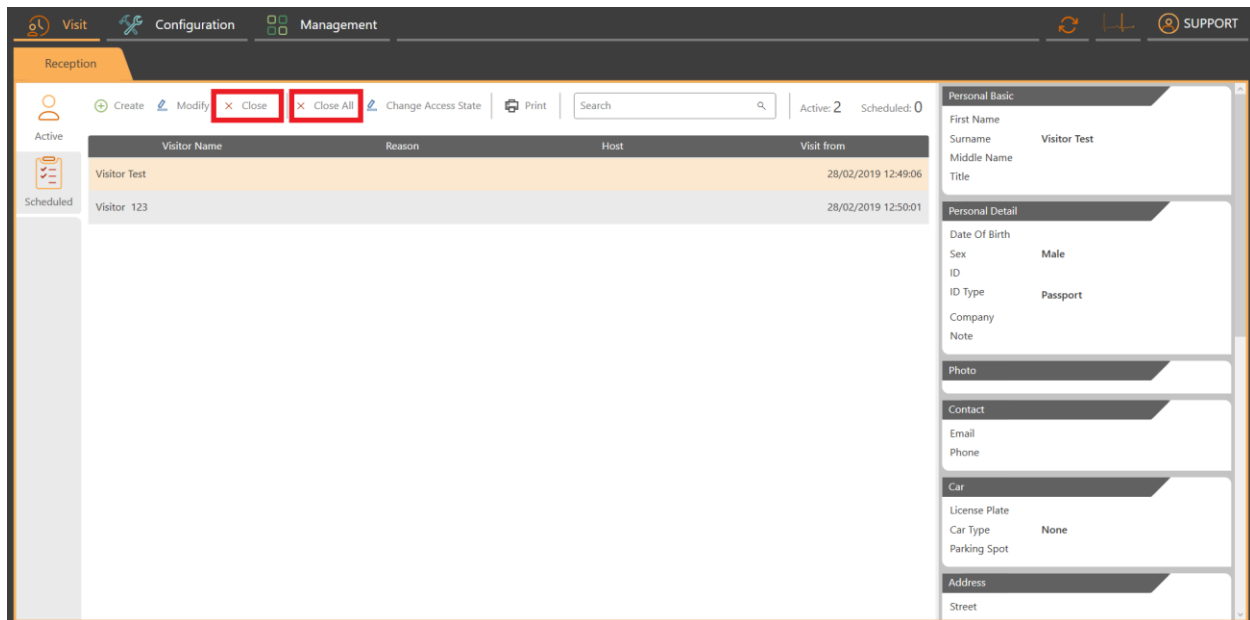


Figure 26 - Close visit

- ✗ **Close:** Closes the selected active visit.
- ✗ **Close All:** Close all active visits.

---

**Note:** Upon closing a visit, all credentials assigned to a visitor should cease to have access.

---

### 2.1.3. Modify Visit/Visitor Information

Visitor and visit information can be modified by selecting a visit from the *Records List* and clicking the **Modify** button within the *Infotypes Panel*.

**Modify:** Allows user to modify the selected active visit.

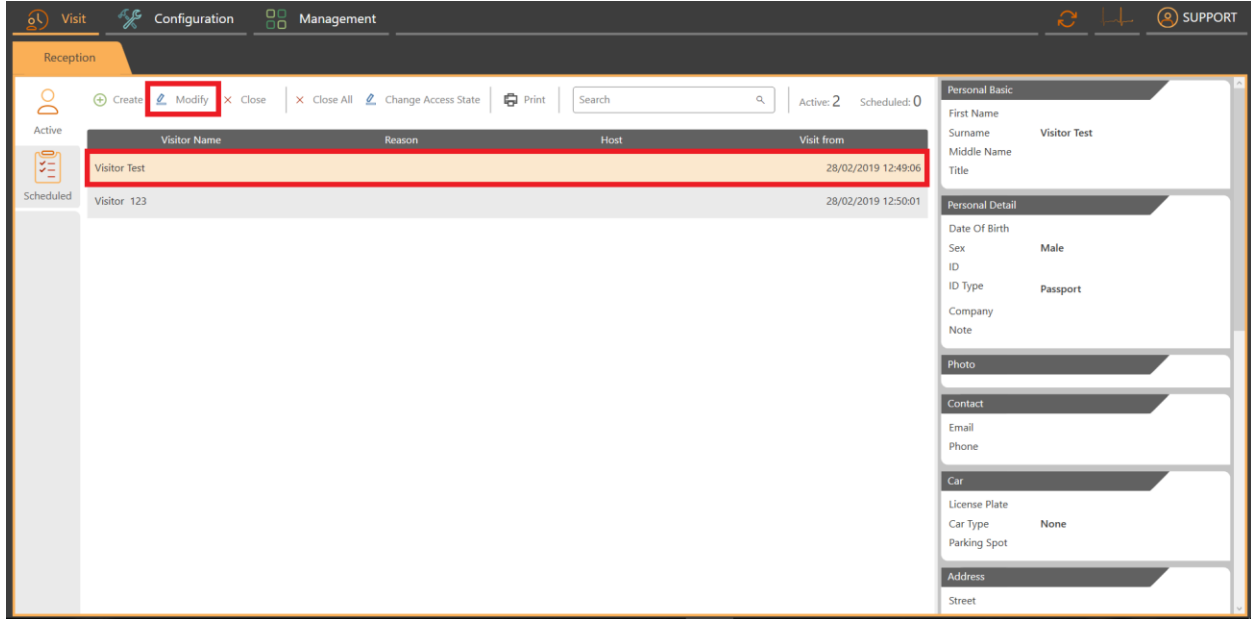


Figure 27 - Modifying visit/visitor information

This opens a wizard, where it is possible to modify information. Navigate through information by selecting information blocks from the left side of the wizard.

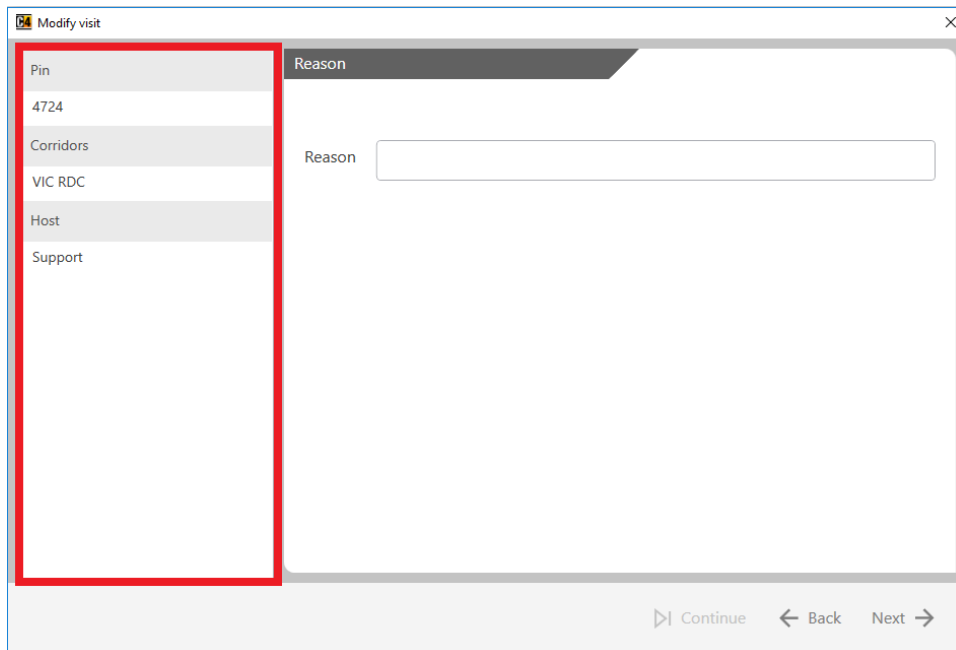




Figure 28 - Modify visit window

## 2.1.4. Print Visit Report

Visit reports can be printed from the *Active Visits Infotypes Panel*. The report only contains information on active visits.

To print an active visits report, click the  **Print** button, which is located at the top of the *Active Visits Infotypes Panel*.

 **Print:** Print a report of visits.

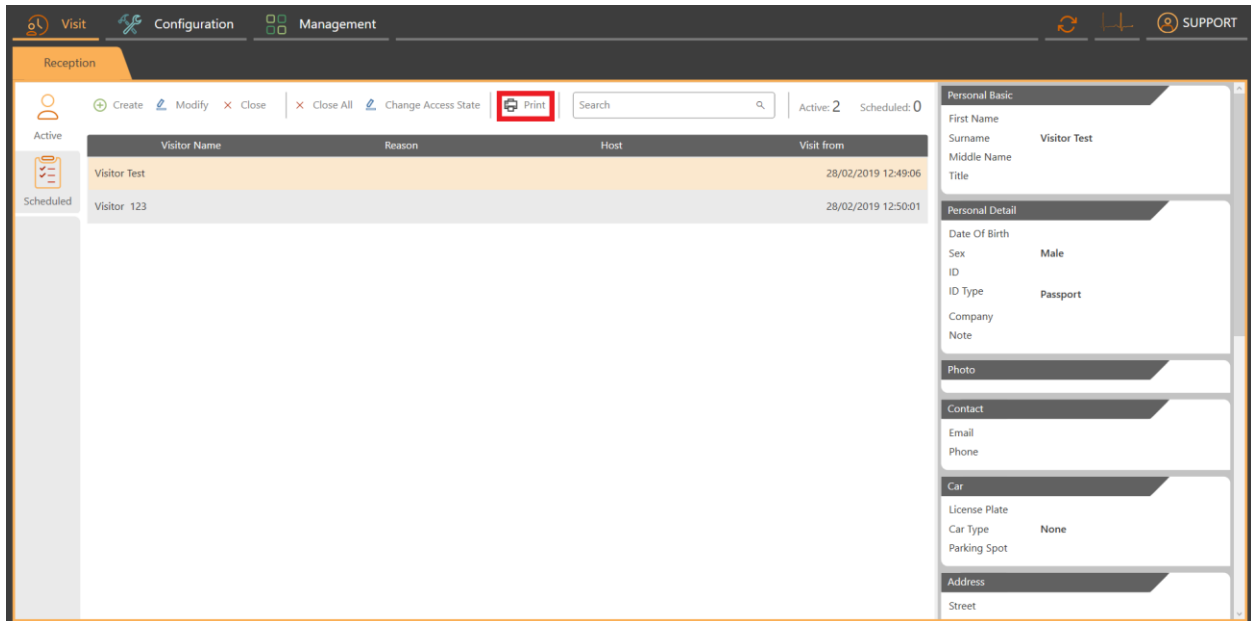


Figure 29 - Print report

A dialog box will appear, asking whether you wish to print the report or save it as a file on your computer.

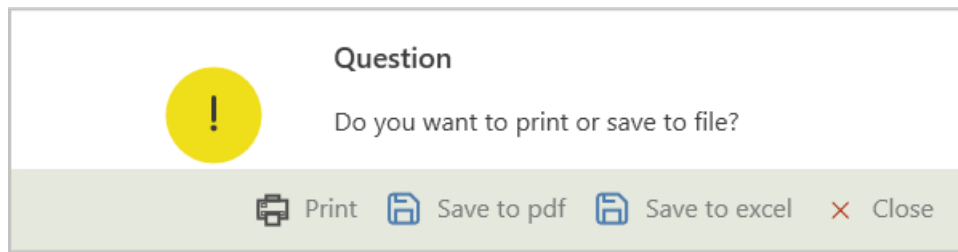






Figure 30 - Print or save dialog box

 **Print:** Print a report of visits.

 **Save as pdf:** Saves the report as a .pdf file.

 **Save as excel:** Saves the report as an excel file.


---


 **Tip:** Printing a report can be useful in case of emergencies, such as a fire, when a receptionist can print a list of active visitors in the building and provide this information to a responsible entity.

---

## 2.1.5. Blacklist Visitor

The **Blacklist** function is intended for keeping track of suspicious visitors or completely blocking them from entering a building, by adding them to a blacklist. The *Visitor Module* has 3 blacklist levels that can be assigned to a visitor.

If the **Blacklist** function is enabled for a receptionist, it appears as a button within the set of buttons of the *Infotypes* panel. To blacklist a visitor, select a record from the record list of visits and click the  **Change Access State** button.

 **Change Access State:** Opens wizard with blacklist options.

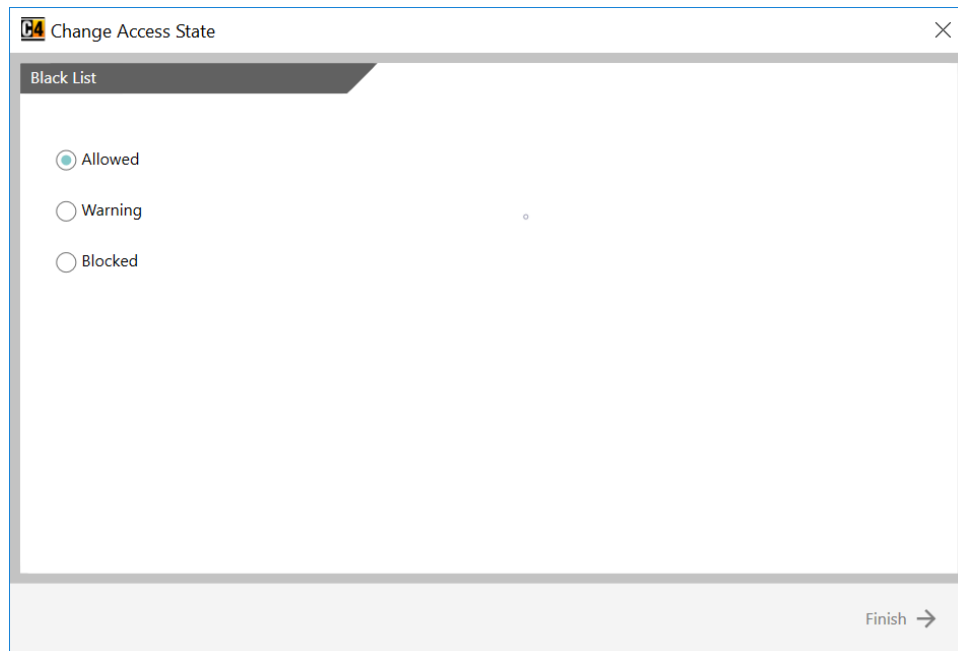


Figure 31 - Change Access State of Visitor Wizard

**Allowed (default)** – This person is not blacklisted; they are allowed to enter the building.

**Warning** – This is used to mark a given visitor as a suspicious person; they are allowed to enter the building. A receptionist manager will be informed about their presence and further internal measures can be carried out.

**Blocked** – This person is blacklisted; they are blocked from entering the building.

## 2.2. Scheduled Visits

The *Scheduled Visits Panel* allows a receptionist to schedule future visits, and enter known details about a visitor and time of a visit.

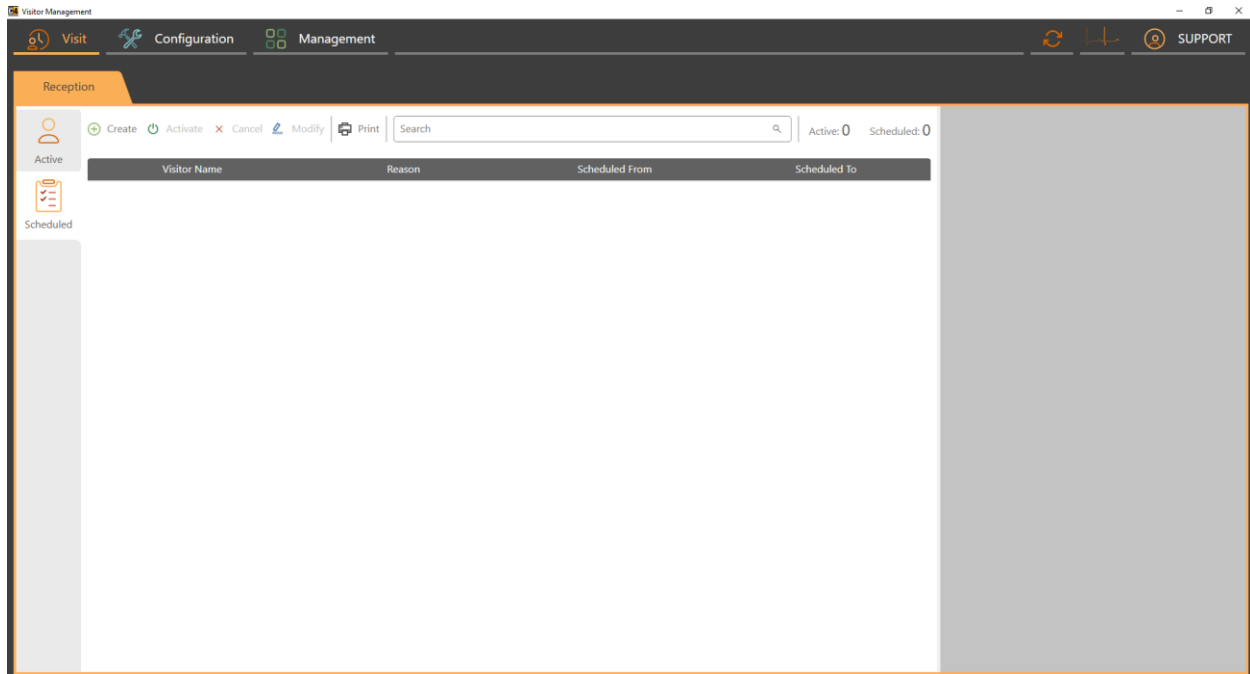


Figure 32 - Scheduled Visit Panel

The buttons at the top of the *Infotypes Panel* allow a receptionist to carry out functions, such as: activating a visit, cancelling a visit, modifying a visit, and printing a scheduled visit report.

The search bar provides a user with the option of filtering through scheduled visits.

Clicking on a visit will display further information about the selected visit via the *Details Panel*.

## 2.2.1. Create Scheduled Visit

To create a scheduled visit, click the **Create** button.

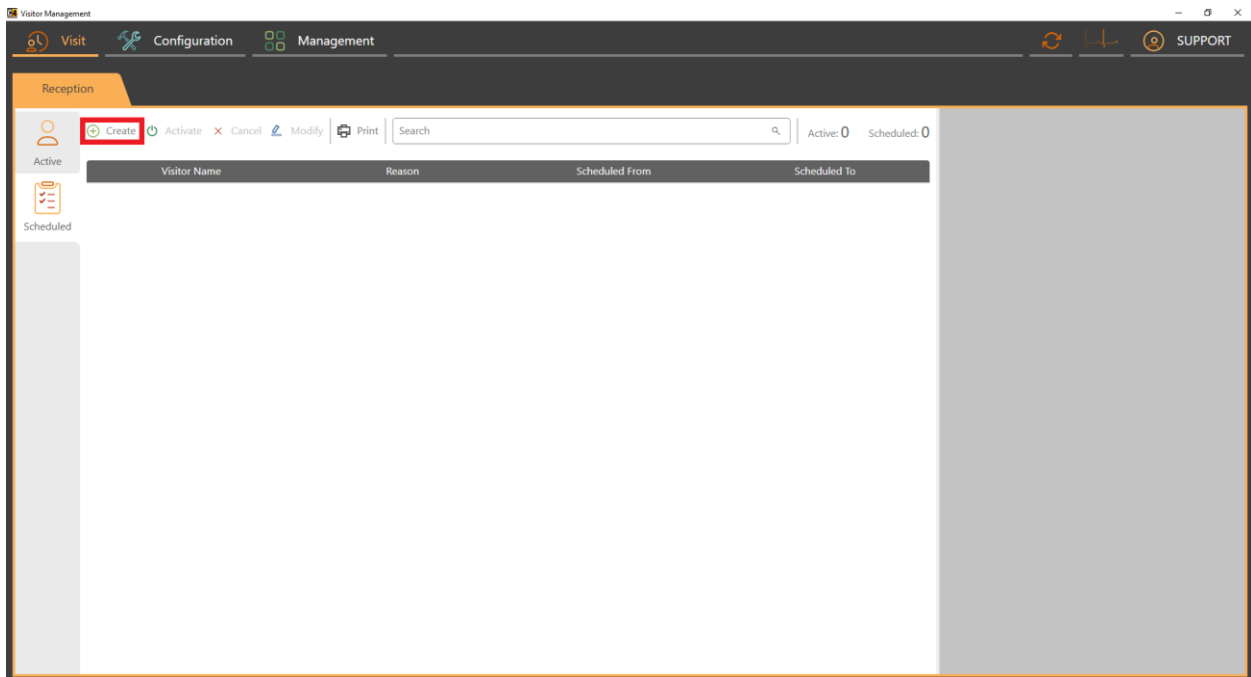


Figure 33 - Create scheduled visit

The scheduled visit wizard will appear. Either search for an existing visitor using the search bar, select them and click the **Use Selected Visitor** button or create a new visitor using the **Add Visitor** button.

If you are adding a new visitor, please carry out the same steps as are mentioned in chapter 2.1.1 *Create Visit*. Proceed by following steps on the next page.

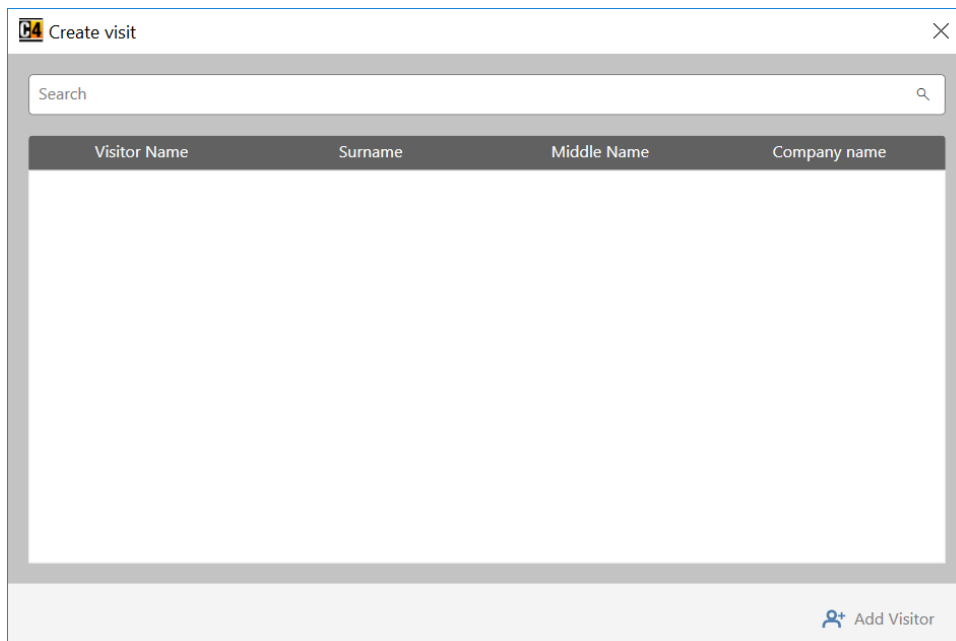


Figure 34 - Create scheduled visit wizard

The final step in creating a scheduled visit is entering date information and a reason of visit (if this option is configured). Click on the calendar and select a date for **Scheduled from** and **Scheduled to** or write in the required date in the fields. Next, it is possible to toggle through the time using the up and down arrows, unravel times by the hour clicking on the dropdown button, or enter the correct time directly in the timespan editor.

The screenshot shows a web application window titled "Adding Visitor Panel". On the left is a sidebar menu with the following items: "Personal Basic", "Scheduled", "Visitor 1", "Contact", "scheduledvisitor@gemax.com", "Visitee", and "Support". The main content area is titled "Reason" and contains the following fields:


- A text input field labeled "Reason".
- A "Scheduled From" field containing the date "04/12/2018" and a calendar icon, followed by a time selector showing "12:05:56" with up and down arrows.
- A "Scheduled To" field containing the date "04/12/2018" and a calendar icon, followed by a time selector showing "12:05:56" with up and down arrows.

At the bottom right of the window, there are three navigation buttons: "Continue" (with a play icon), "Back" (with a left arrow), and "Finish" (with a right arrow).

Figure 35 - Entering time for scheduled visit

## 2.2.2. Activate Scheduled Visit

Activating a scheduled visit means that a visitor has arrived to a reception. Since they are presently visiting, the visit will be moved to the *Records List* within *Active Visits*.

To activate a visit, select the visit from the *Records List* and click the  **Activate** button, which is located at the top of the *Infotypes Panel*.

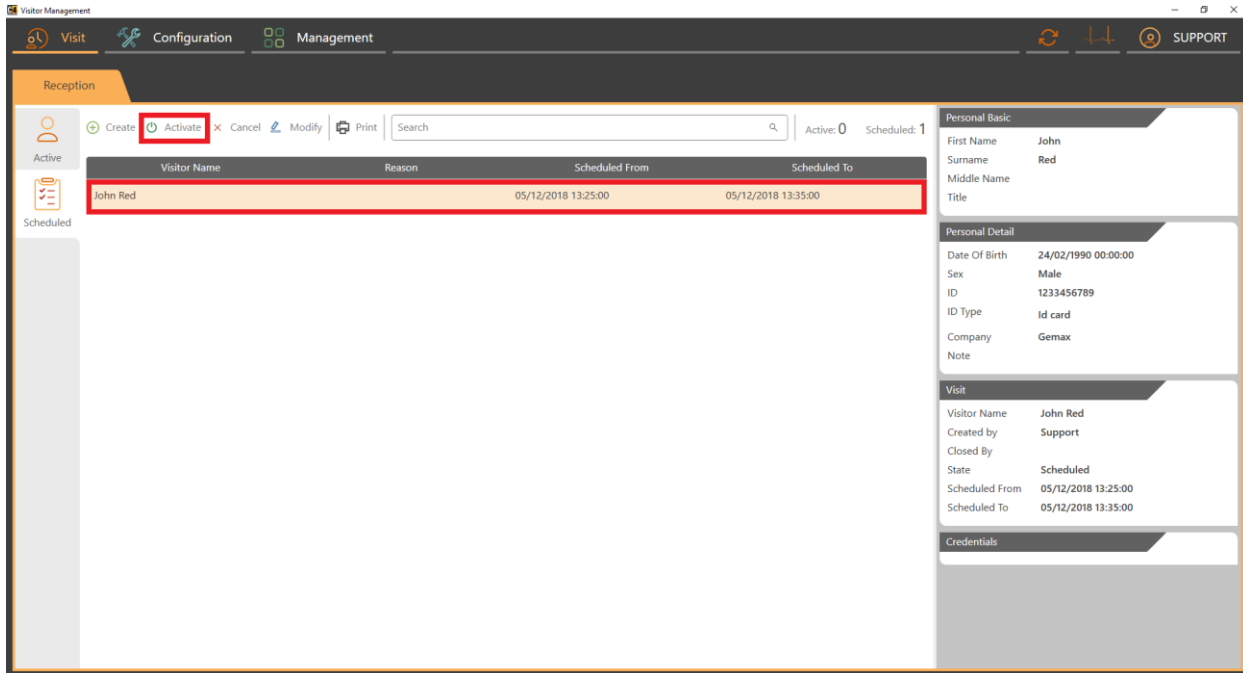


Figure 36 - Activate scheduled visit



**Note:**

If the reception has a PIN credential preuploading configured (see page 49), the visit is automatically activated once a PIN credential is used for the first time.



### 2.2.3. Modify Scheduled Visit

Visitor and visit information can be modified by selecting a visit from the *Records List* and clicking the [Modify](#) button within the *Infotypes Panel*.

[Modify](#): Allows user to modify the selected scheduled visit.

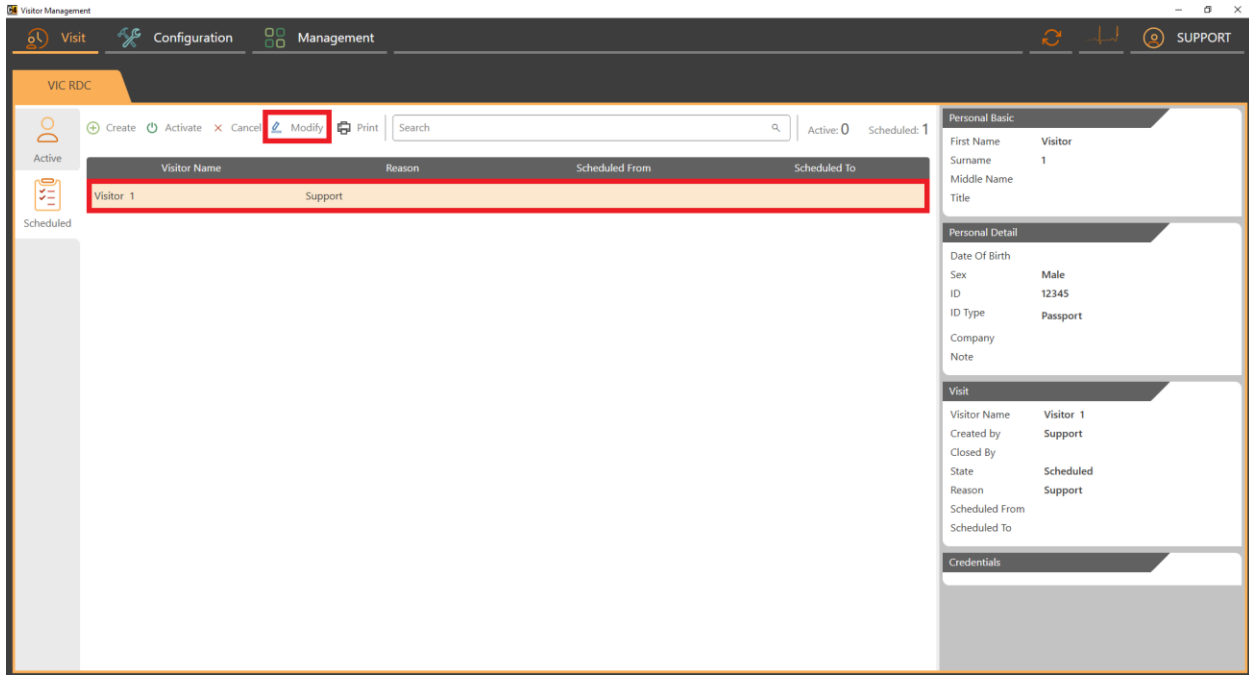


Figure 37 - Modify scheduled visit

The visit wizard will pop-up and information can be edited by selecting it from the left side and entering new values.

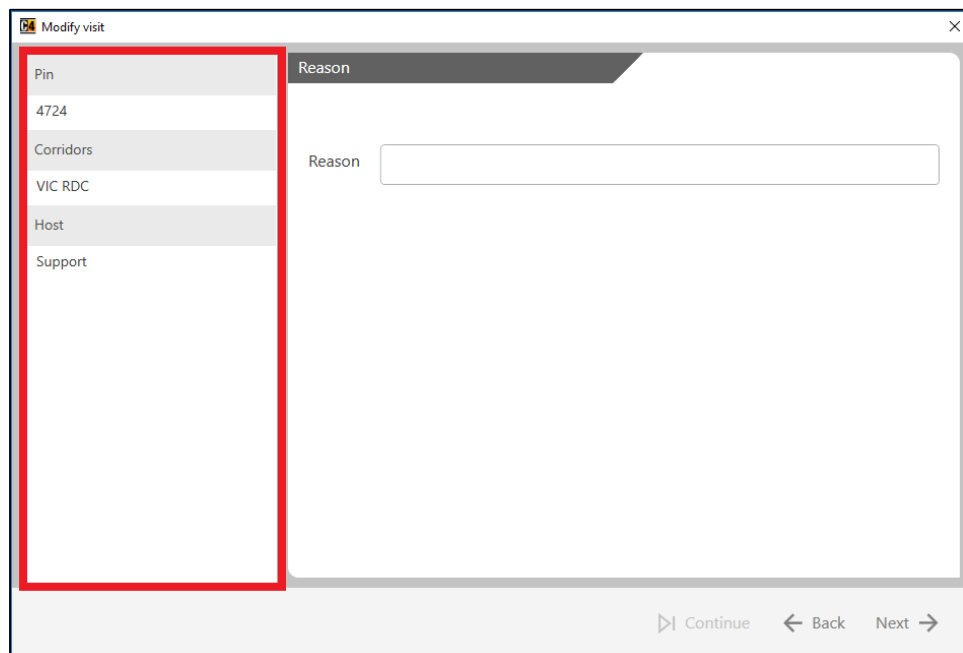


Figure 38 - Modify visit wizard

## 3. Configuration – Administrator

The *Configuration Panel* is intended for an administrator. The role of an administrator is to set up a reception in such a way, that it will be prepared for use by a receptionist or a reception manager.

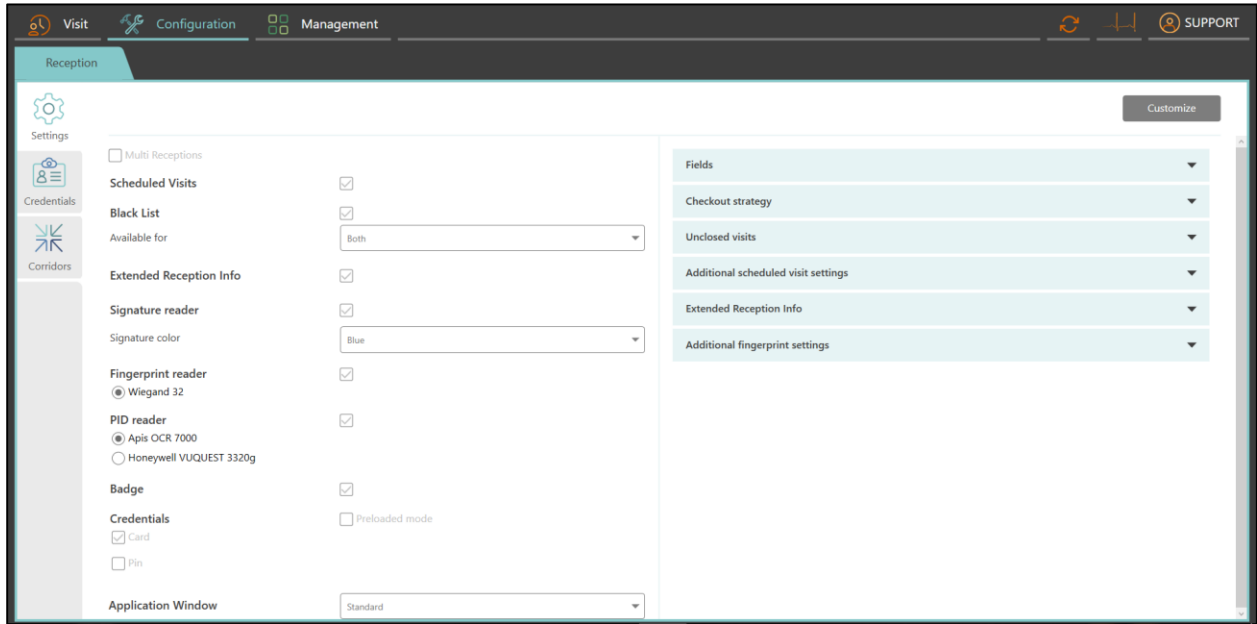


Figure 39 - Configuration

The *Infotypes Panel* within the *Configuration Panel* provides the option to choose from *Settings*, *Credentials*, and *Corridor Tabs*, which are going to be described in the following sections.

### 3.1. Reception Administration

If the **Multi Receptions** option is selected (see *Multi Receptions* on page 36), receptions can be added, archived or restored. The following chapters will explain how to set up and manage reception administration in the case that multiple receptions are required.

#### 3.1.1. Create Reception

To create a reception, click the **+** **Add Reception** button in the top right corner of the *Main Panel*.

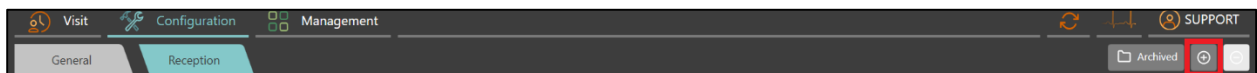


Figure 40 - Add reception button

A reception creation wizard will open. Enter a name for the new reception. Click the **➔** **Finish** button.

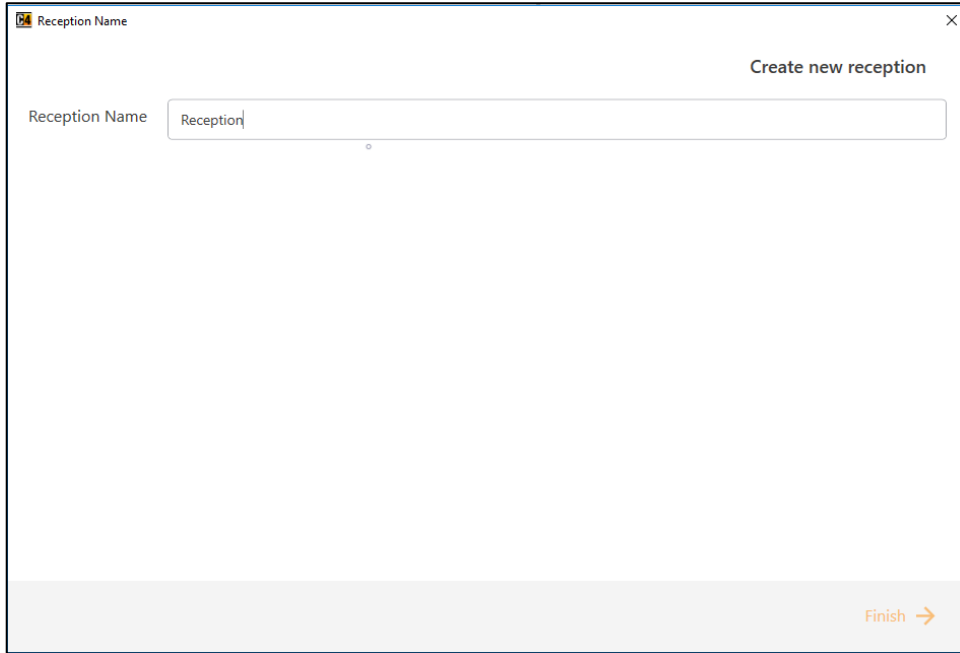


Figure 41 - Adding reception

Once the reception is created, all settings that are configured in the *General Tab* will be duplicated to this new reception.

### 3.1.2. Archive Reception

To archive a reception, select the reception that should be archived from the *Tab Panel*. Then click on the **Archive Reception** button in the top right corner of the *Main Panel*.



Figure 42 - Archive reception button

A dialog box will appear, asking for confirmation. Click the  **Yes** button to confirm, or the  **No** button in case you wish to return.

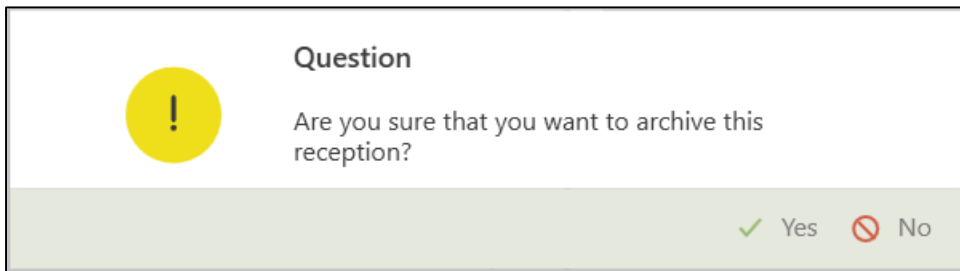


Figure 43 - Archive reception dialog box

### 3.1.3. Restore Reception

To restore an archived reception, click the **Archived**  button in the top right corner of the *Main Panel*.

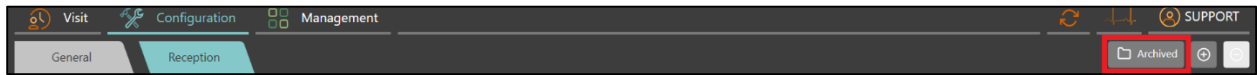



Figure 44 - Archived button

A pop-up window will open. Select a reception to restore and finish by clicking the  **Restore** button.

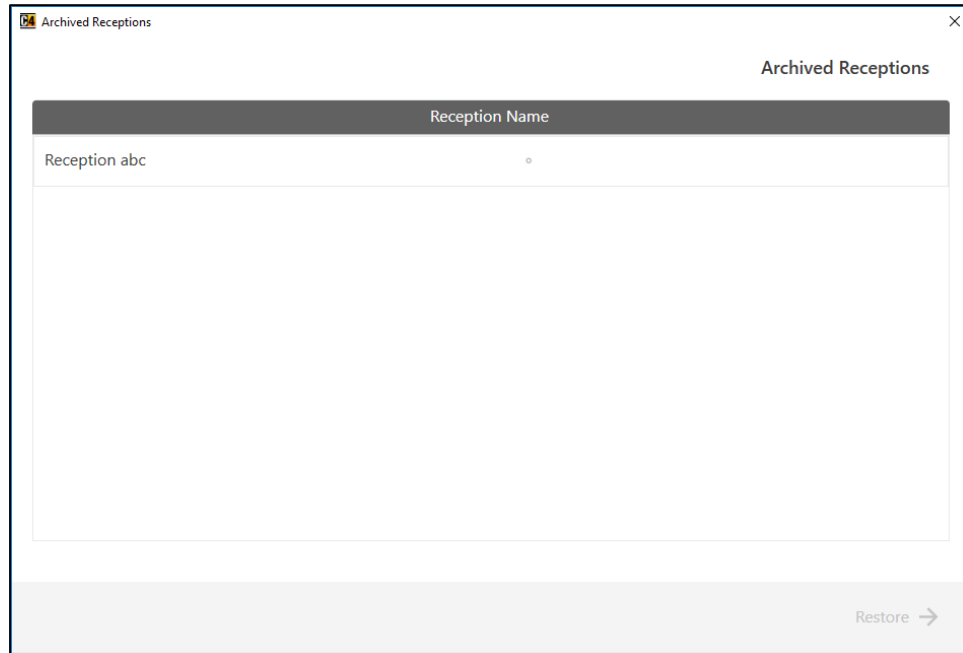


Figure 45 - Restore archived reception

The reception will be restored with the settings it had configured before being archived.

## 3.2. Settings

The *Settings Tab* provides an administrator the option to set the scope of functions which can be used in the *Visit Panel* and *Management Panel*. Each specific function of the settings options is described below.

### 3.2.1. Multi Receptions

The **Multi Receptions** checkbox enables an administrator to choose from using either only one reception (which is set up as the default option after starting the application) or using multi receptions. To use **Multi Receptions**, select the **Multi Receptions** checkbox.



Figure 46 - Multi Receptions checkbox

After clicking on the checkbox, the following changes occur:

In the *Tab Panel*, the existing default reception is split into two tabs: **General** and **Reception**<sup>1</sup>. The *Credentials* and *Corridors Tabs* are now available for each individual reception.

The *General Settings Tab* contains common settings, which are identical for all receptions. The common settings are **Scheduled Visits**, **Black list**, **Extended Reception Info** and **Application Window**. The remaining settings are reception-specific. The *General Settings Tab* provides default settings that are duplicated to new receptions.

In the top right corner of the *Main Panel*, the following buttons will appear:

- + Create New Reception:** Creates a new reception.
- Archive Reception:** Archives a selected reception (Reception a user is currently in, seen in *Tab Panel*).
  - **Archived:** (Appears if there is an archived reception) Allows a user to restore archived receptions.

---

**Note:** If **Multi Receptions** is on, the settings defined in the *General Tab* will be replicated to new receptions.

---

<sup>1</sup> Name of default reception

## Common settings

Common settings are those, that are applied to all receptions and the Visitor Module application in general. The common settings are those that are included in the red boxes as shown below:

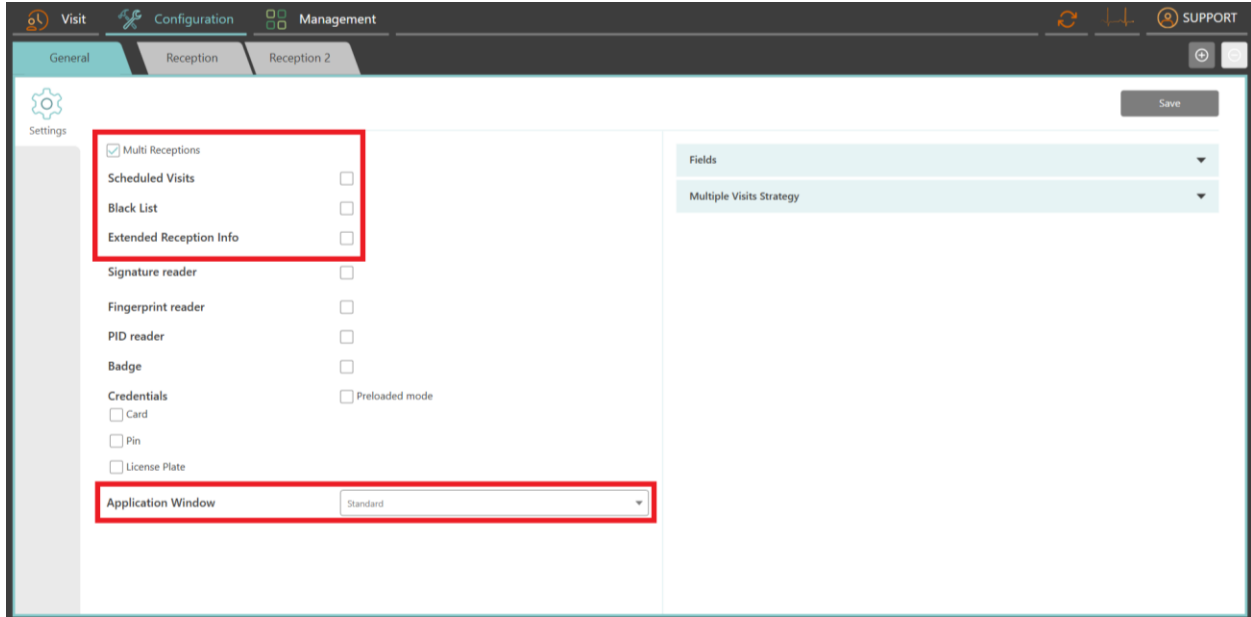


Figure 47 - Common Settings

All other settings are those, that are duplicated to newly created receptions.

### 3.2.2. Scheduled Visits

**Scheduled Visits** are visits created in advance, allowing a receptionist to enter known personal details of a person.

The **Scheduled Visits** option in the *Configuration Panel* enables an administrator to decide, whether the function should be visible in the *Visit Panel* for a user or not by selecting the **Scheduled Visits** checkbox:

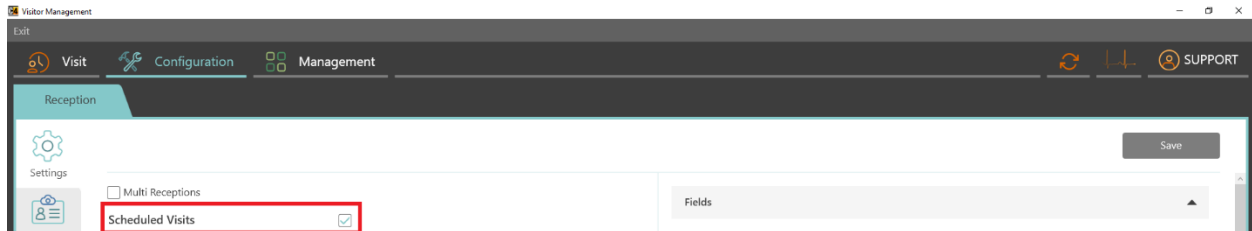


Figure 48 - Scheduled Visits Checkbox

---

**Note:** It is possible to add more information during an activation of a visit.

---

### 3.2.3. Black List

**Black List** enables a receptionist to set three levels of blacklisting to a specific visitor:

**Allowed (default)** - The selected person is not present on the black list.

**Warning** - The person is suspicious, and a receptionist should allow the person to enter the building, but under the condition that this is reported to the reception manager.

**Blocked** - The person is present on the black list; therefore, they are banned from entering the building.

To enable the Black List functionality, select the **Black List** checkbox. The combo box under the checkbox allows the administrator to decide whether the receptionist, the reception manager or both can use the black list functionality.

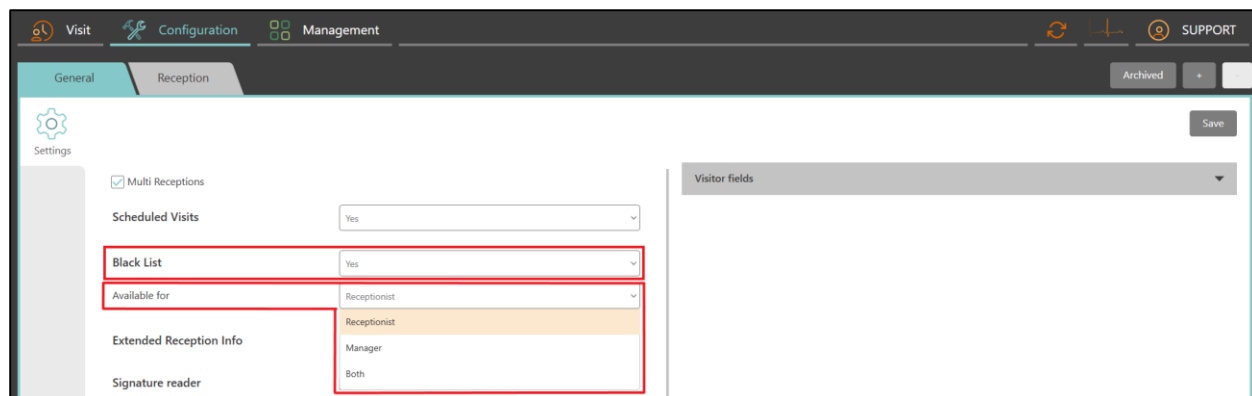


Figure 49 - Black List set up in Configuration Panel

See chapter 2.1.5 Blacklist Visitor to see how the receptionist uses the blacklist functionality.

See chapter 4.7 Blacklist to see how the reception manager uses the blacklist functionality.

### 3.2.4. Extended Reception Info

**Extended Reception Info** allows an administrator to display additional details about the selected reception, in the scope of: **Street, City, Zip, Country, Phone** and **Second Phone**. This allows an administrator to navigate through receptions easier and to know where the receptions are located (what city etc.). After selecting the **Yes** option, the **Extended Reception Info** field block will appear for every reception on the right side of the *Infotypes Panel* as is shown below.

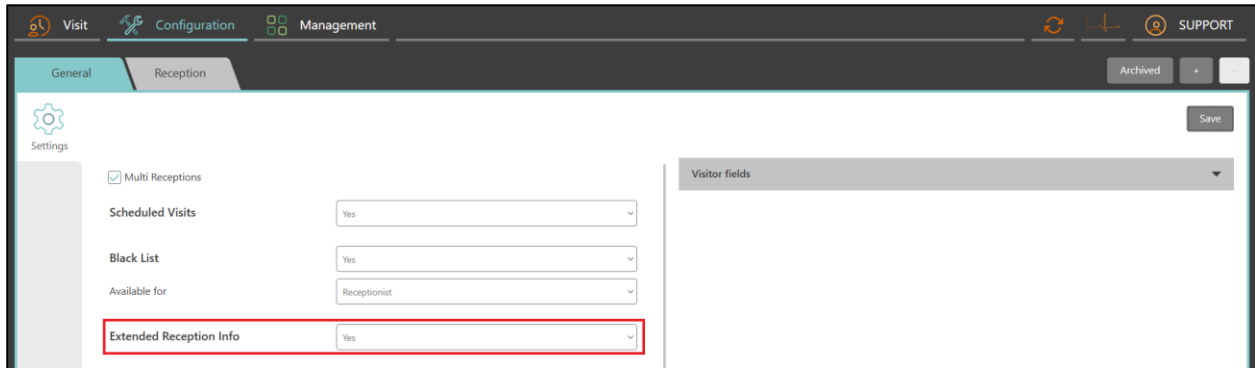


Figure 50 – Yes selected for Extended Reception Info

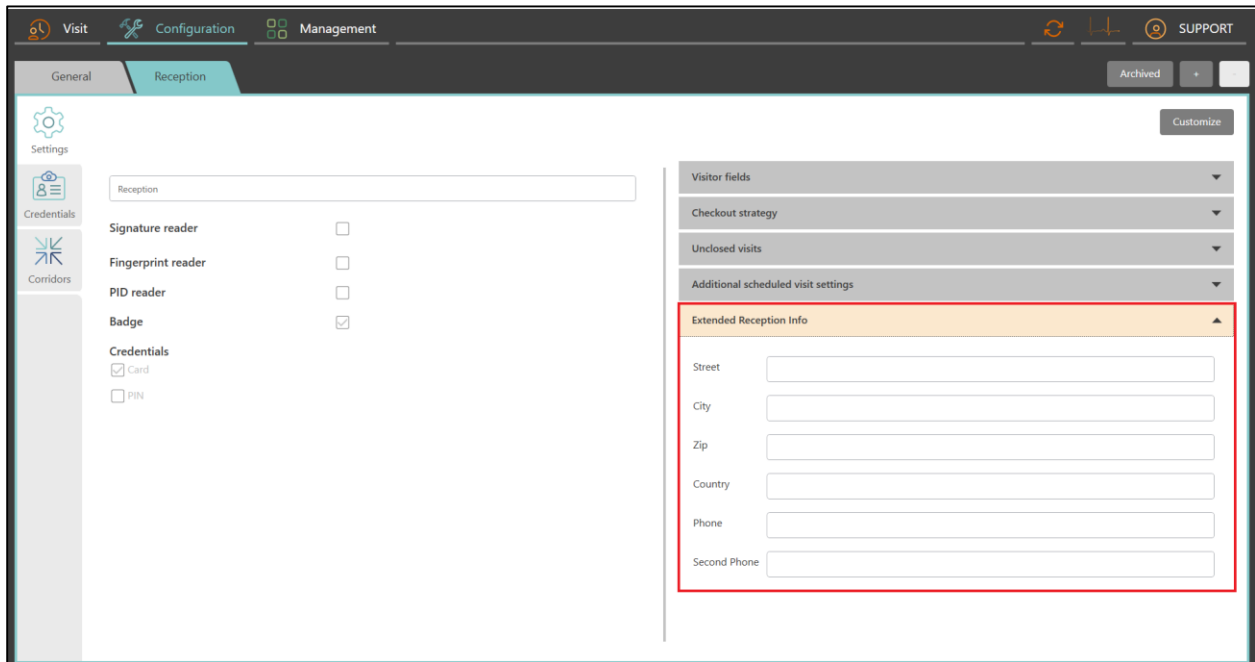


Figure 51 - Extended Reception Info on a reception

### 3.2.5. Signature Reader

**Signature Reader** enables a receptionist to use a signature reader device, allowing them to take a visitor's signature to the application and pair it with a given document, such as the local policies document. This is enabled by clicking on the checkbox next to the **Signature Reader**. There is also possibility to choose,



whether color the signature will have. This option will appear after clicking on the **Signature Reader** checkbox. It is possible to choose blue or black for the signature color.

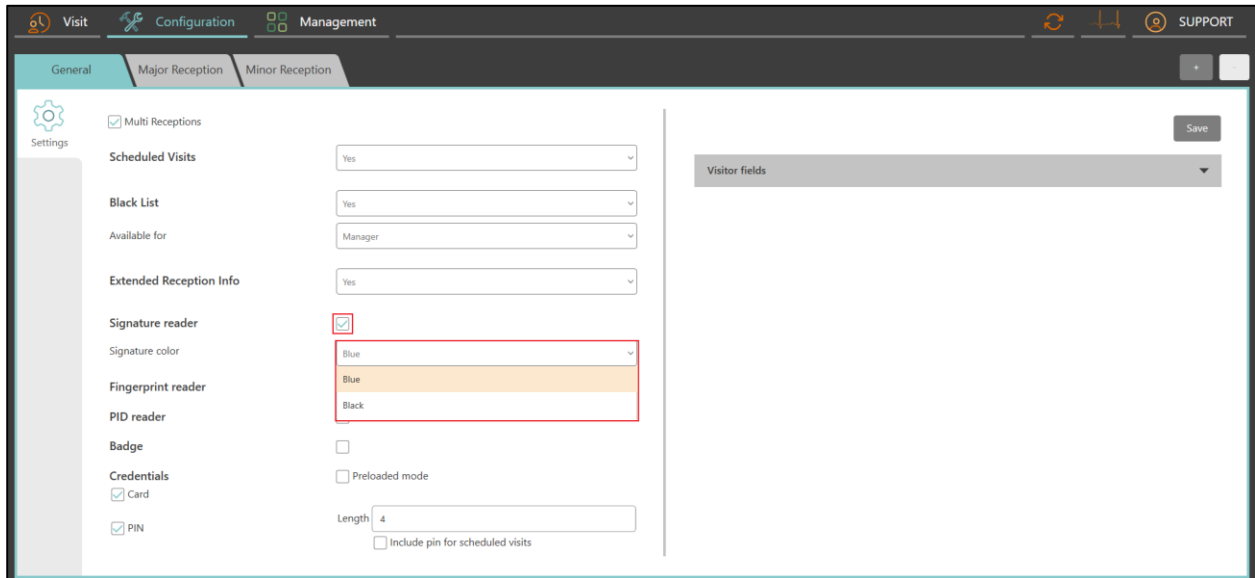


Figure 52 – Signature Reader checkbox and color options

### 3.2.6. Fingerprint Reader

**Fingerprint Reader** enables a receptionist to use a fingerprint reader, allowing them to capture a visitor’s fingerprint and use it as a credential to provide access to the selected corridor. This is enabled by clicking on the checkbox next to the **Fingerprint Reader**.

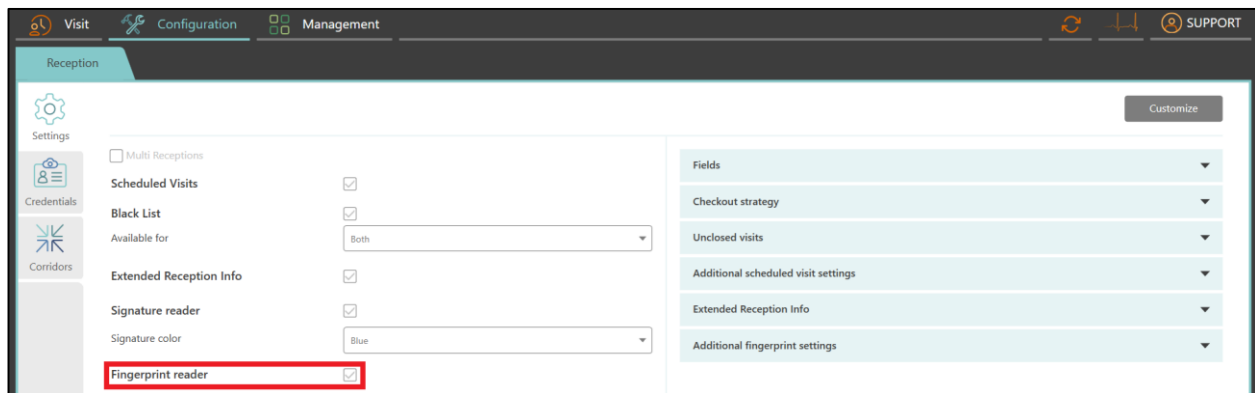


Figure 53 - Fingerprint Reader checkbox

### 3.2.7. PID Reader

**PID Reader** enables a receptionist to use a PID reader device, which imports basic personal information during the creation of a visit. This is enabled by clicking on the checkbox next to the **PID Reader**.

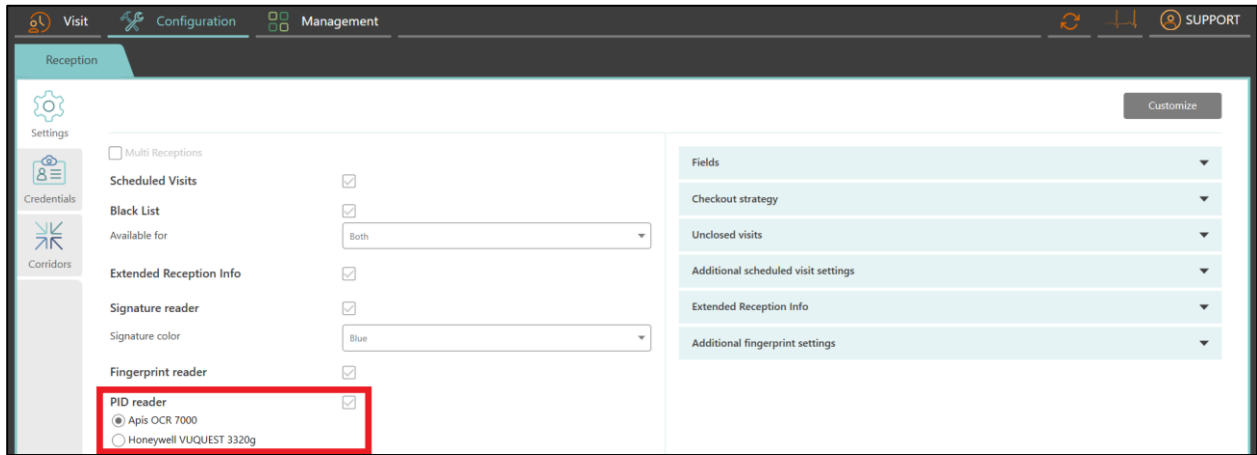


Figure 54 - PID Reader checkbox

Currently there are 2 supported PID readers:

- APIS OCR 7000
- Honeywell VUQUEST 3320g

Select one of them for use in the given reception.

### 3.2.8. Badge

**Badges** serves as an identification tool for visitors. A receptionist creates them for a visitor. Badge templates can be created in the *Management Panel* (see page 79).

Enabling the **Badge** functionality is done by clicking on the checkbox next to the **Badge** title.

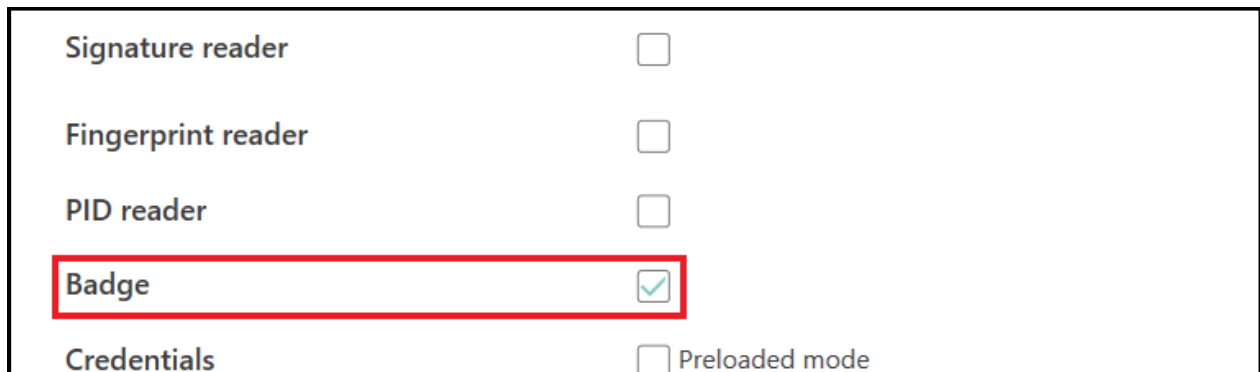
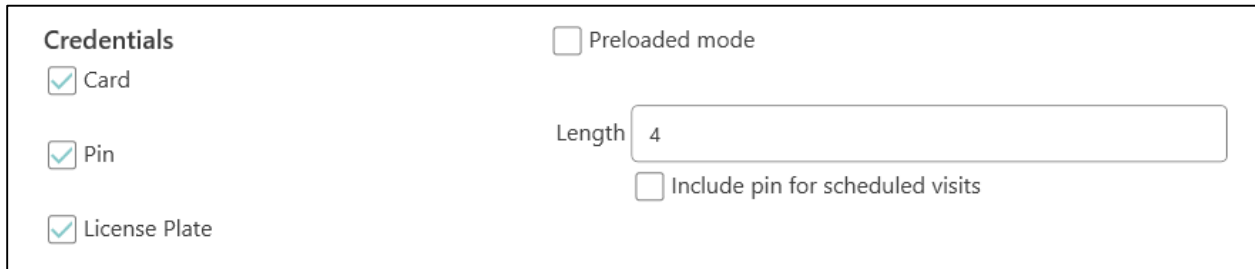


Figure 55 - Badge checkbox

### 3.2.9. Credentials

**Credentials** enables an administrator to specify of credentials that should be assigned to visitors at the reception. Currently there are three types of credentials:



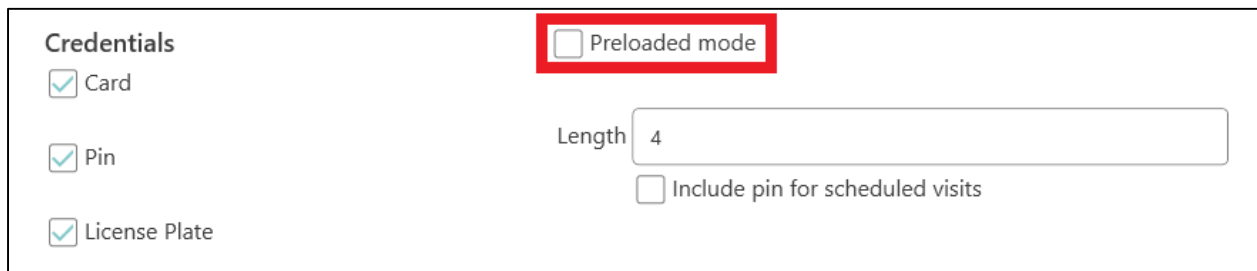
The screenshot shows a configuration form for credentials. On the left, under the heading "Credentials", there are three checked checkboxes: "Card", "Pin", and "License Plate". On the right, there is an unchecked checkbox for "Preloaded mode", a text input field for "Length" containing the number "4", and another unchecked checkbox for "Include pin for scheduled visits".

Figure 56 - Card and PIN checkboxes

Selecting the checkboxes enables the use of the corresponding credential at the given reception.

1. **Card:** Enables a visitor to access certain corridors using a card within a building.

Next to the **Card** checkbox, there is the **Preloaded mode** checkbox. This is used for access devices that have cards preloaded to them during a time specified for the device, the Night Upload function must be turned on in the C4 Client. These cards will have access to all corridors assigned to a reception.



This screenshot is identical to Figure 56, but the "Preloaded mode" checkbox is highlighted with a red rectangular border.

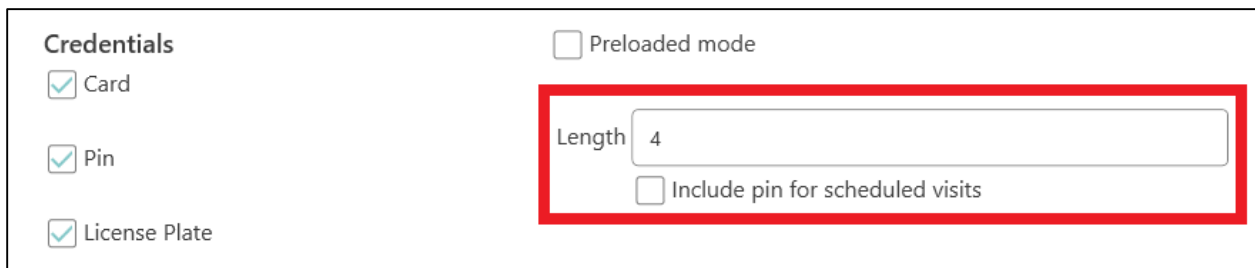
Figure 57 - Preloaded mode checkbox



**Warning:**

Preloaded mode disables the use of other upload features, such as preupload for scheduled visits!

2. **PIN:** Enables a visitor to access to certain corridors using a PIN.



This screenshot is identical to Figure 56, but the "Length" text input field and the "Include pin for scheduled visits" checkbox are highlighted with a red rectangular border.

Figure 58 - Length field and Include pin for scheduled visits Checkbox


Next to the **PIN** checkbox are two options which can be set:

The **Length** determines the length of a PIN number.

The **Include pin for scheduled visits** checkbox determines whether Pin codes should be generated during the creation of a scheduled visit. This function is used in conjunction with the **Preupload Credentials** setting, described on page 49. Turning both of these on allows the receptionist to provide the visitor with access to a selected corridor a certain time before their visit, as the pin generated for the scheduled visit is uploaded to devices a certain time before their expected arrival.

3. **License Plate:** Enables the receptionist to enter License plate information about the visitor's vehicle for active visits and scheduled visits. In case the corridor contains license plate reader devices, the visitor is provided with access for their vehicle.

---

 **Note:** In order to use a license plate as a credential for scheduled visits, **Preupload of credentials** must be turned on!

---

### 3.2.10. Application Window

**Application Window** enables an administrator to switch between different types of the application window on a screen. There are three different types of application window settings:

**Standard** – Application window with three options in the top right corner of the window:

- **Minimize**
- ▣ **Restore down / Maximize** □
- × **Close**

**None** – Full screen viewing area without three options available in standard type.

**Close only** – Application window with only one option, × **Close**.

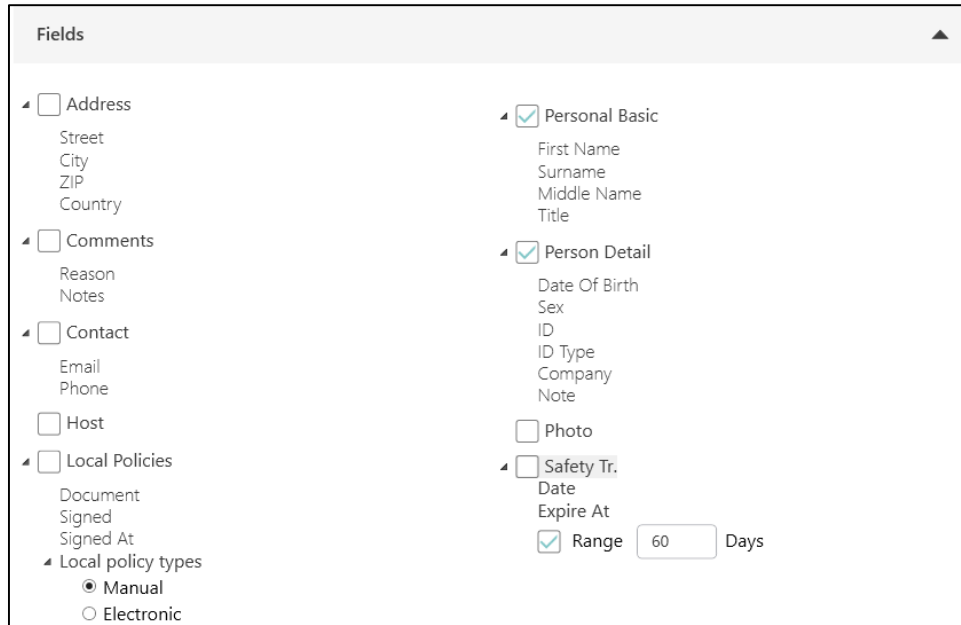
---

 **Note:** Restart of the client is necessary in order to apply the changes!

---

### 3.2.11. Fields

The administrator sets up the scope of information collected by a receptionist by selecting field block checkboxes. The field block checkboxes can be dropped down to display what information fields are contained within the field block (e.g. Contact contains Email and Phone information).



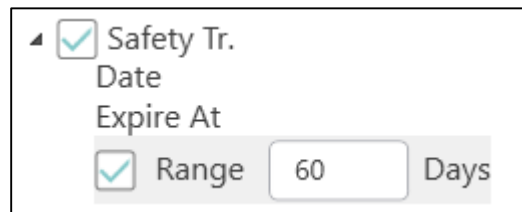
The screenshot shows a window titled "Fields" with a scrollable list of field blocks. Each block has a checkbox and a dropdown arrow. The blocks and their sub-fields are:

- Address
  - Street
  - City
  - ZIP
  - Country
- Comments
  - Reason
  - Notes
- Contact
  - Email
  - Phone
- Host
- Local Policies
  - Document
  - Signed
  - Signed At
  - Local policy types
    - Manual
    - Electronic
- Personal Basic
  - First Name
  - Surname
  - Middle Name
  - Title
- Person Detail
  - Date Of Birth
  - Sex
  - ID
  - ID Type
  - Company
  - Note
- Photo
- Safety Tr.
  - Date
  - Expire At
    - Range  Days

Figure 59 - Visitor Fields

### Safety Training

The **Safety Training** checkbox allows the administrator to set up Safety Training as a requirement for a visitor pass through the reception.



This close-up shows the "Safety Tr." section with the following options:

- Safety Tr.
- Date
- Expire At
  - Range  Days

Figure 60 - Safety Training Configuration

The time range for how long a safety training is valid for before renewal can only be set in the *General Tab*. This is done by selecting the **Range** checkbox as seen in the image above and entering the number of days the safety training is valid for. Once the visit for a visitor that has attended safety training is created, information about the Date of Attending Safety Training, Expiration Date and Time Range of Safety Training can be seen in the *Details Panel* of the selected visit.

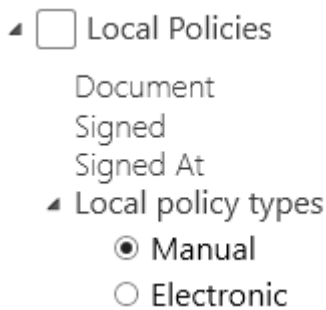
**Tip:**

Safety training is useful in places like mining areas, where a visitor must undergo safety training in order to access a potentially dangerous area. Usually the receptionist sends the visitor to a responsible trainer, the visitor undergoes training and the reception manager then grants the visitor approval that they have undergone safety training (see chapter 4.6 on page 90)

---

## Local Policies

The **Local Policies** checkbox allows the administrator to set up a Local Policy signature requirement for a reception.



*Figure 61 - Local Policies Configuration*

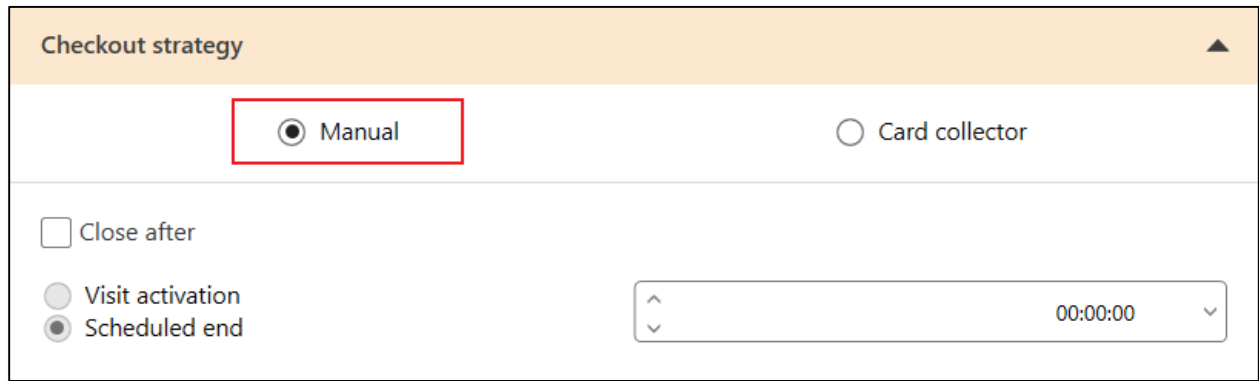
Local Policies can be signed in one of two ways:

- **Manual** – The signature is signed on paper and a checkbox is simply ticked during visit creation.
- **Electronic** – If a signature reader is connected, the document is electronically signed.

### 3.2.12. Checkout Strategy

This setting enables an administrator to choose one from two options of **Checkout Strategy**:

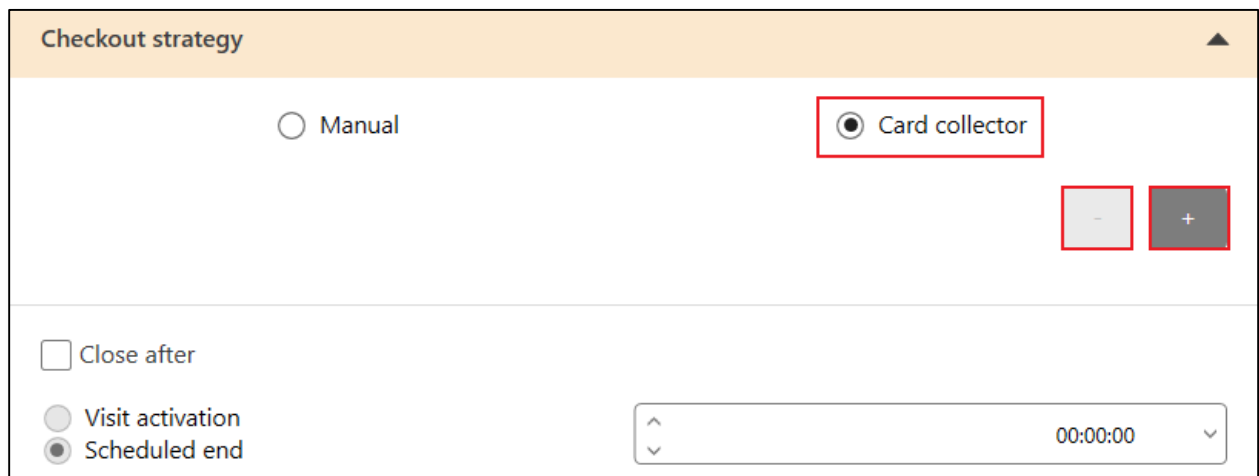
1. **Manual**: By checking this box, a receptionist will need to checkout a visitor after ending of his visit manually.



The screenshot shows a configuration panel titled "Checkout strategy". At the top, there are two radio button options: "Manual" (which is selected and highlighted with a red box) and "Card collector". Below this, there is a "Close after" checkbox which is unchecked. Underneath, there are two radio button options for "Visit activation": "Visit activation" (unchecked) and "Scheduled end" (checked). To the right of these options is a time selection dropdown menu currently set to "00:00:00".

Figure 62 - Checkbox for Manual Checkout strategy activation

2. **Card Collector**: Checking this box allows an administrator visit to be closed automatically, without the need for a receptionist to do it manually. For example, an access card or a badge can be thrown into a box with a scanner, which will identify it and close the visit of that visitor that had the credential assigned to them.



The screenshot shows the same "Checkout strategy" configuration panel. In this view, the "Card collector" radio button is selected and highlighted with a red box, while the "Manual" option is unselected. Below the radio buttons, there are two small square buttons: a grey one with a minus sign (-) and a dark grey one with a plus sign (+), both highlighted with red boxes. The "Close after" checkbox remains unchecked, and the "Visit activation" options and time dropdown are the same as in the previous screenshot.

Figure 63 - Checkbox for Card Collector activation

- **Add**: Serves for adding a device. By clicking on it, the list of all available devices will open. An administrator can select here a device that will be used as a card collector.
- **Remove**: Serves for removal of device.

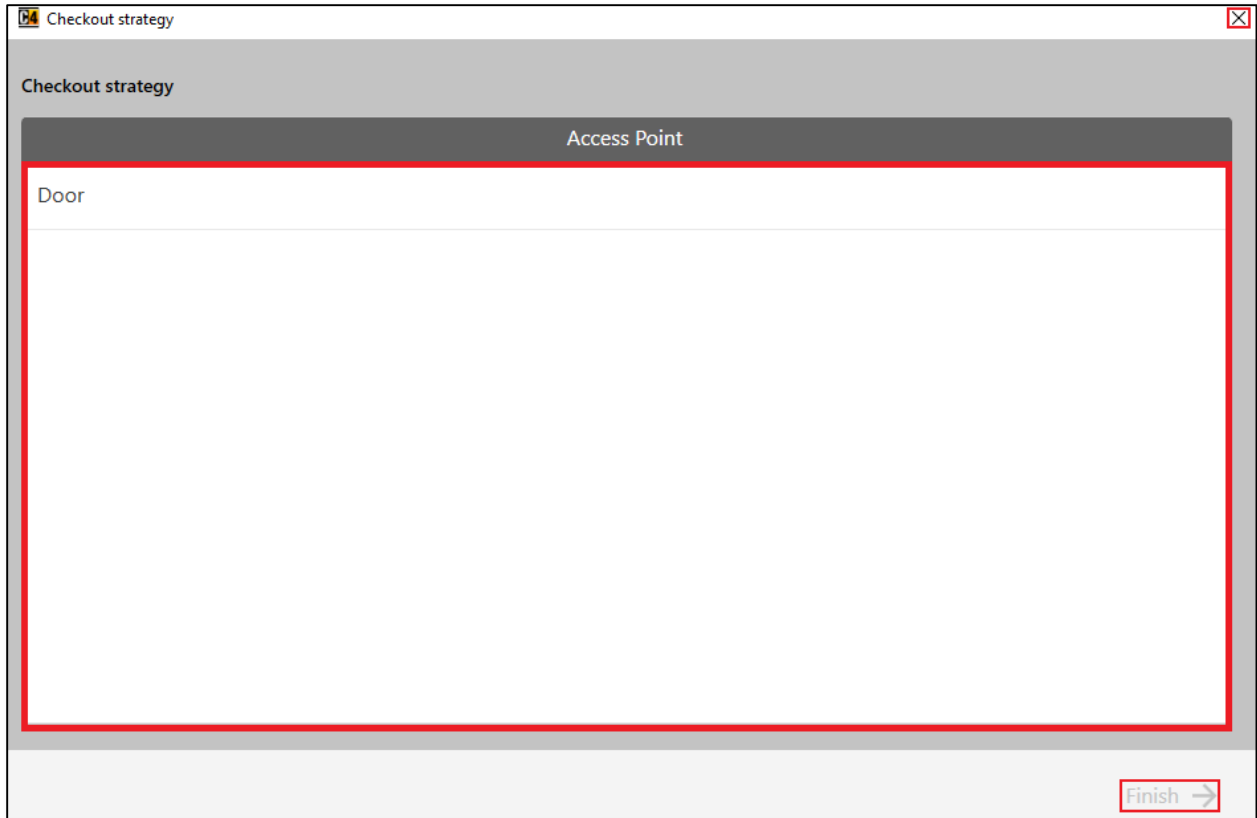


Figure 64 - Wizard for adding and removing devices

If such a situation occurs, that the manual and card collector strategies shall fail, there is an option to use **Close After** mechanic.

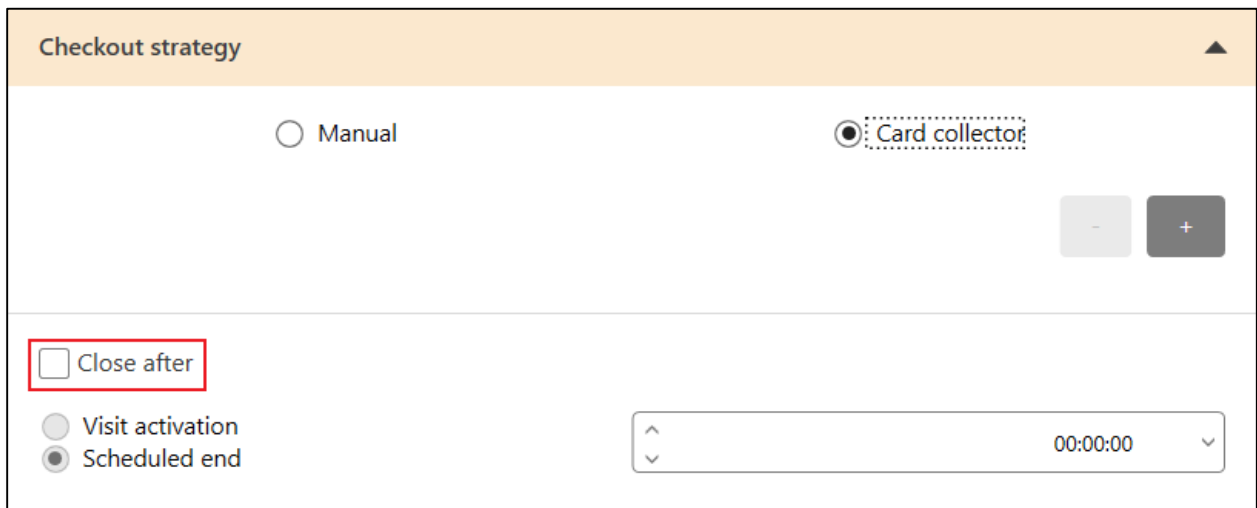


Figure 65 - Checkbox for Close After activation



This will close the activated visit either:

- Visit activation:** Entered time after activation of the visit.
- Scheduled end:** Entered time after the scheduled end time.

Time can be set up in the time field .

### 3.2.13. Unclosed Visits

This setting enable an administrator to set two functions:

**Close at** - By checking this setting and entering a time in the time field  will close all visits, which have not been closed at the entered time.

**Block Credentials** – Checking this setting will block credentials from unclosed visits. The combo box defines whether their status should be set to either **Disabled** or **Lost** once they are blocked.

Either of these functions can be activated by clicking on the desired checkbox.

The screenshot shows a settings panel titled "Unclosed visits". It contains two rows of configuration options. The first row includes a checkbox labeled "Close at" and a time selection field with a value of "00:00:00". The second row includes a checkbox labeled "Block credentials" and a dropdown menu. Both checkboxes are highlighted with red boxes.

Figure 66 - Checkboxes for activation of Close at and Block Credentials

### 3.2.14. Additional Scheduled Visit Settings

An administrator is able to set up **Additional Scheduled Visit Settings** in this section. There are two available settings:

**Preupload Credentials** - By checking this box, the credentials will be preuploaded to all scheduled visits a certain time before the scheduled start, which will be set up in the time field .

**Cancel Scheduled Visit after** - By checking this box, the scheduled visits which have not been activated will be cancelled a certain period of time after the scheduled start. This is set up in the time field

#### Additional scheduled visit settings

Preupload credentials  
Preupload credentials for scheduled visits a certain time before the scheduled visit start

Cancel scheduled visit after  
Cancel inactivated scheduled visits a certain time after their scheduled start.

Figure 67 - Checkboxes for activation of Preupload credentials and Cancel Scheduled Visit after

### 3.2.15. Additional Fingerprint Settings

In case fingerprint credentials are enabled for the reception, it is possible to enforce which fingers must be used through the **Additional Fingerprint Settings** section.

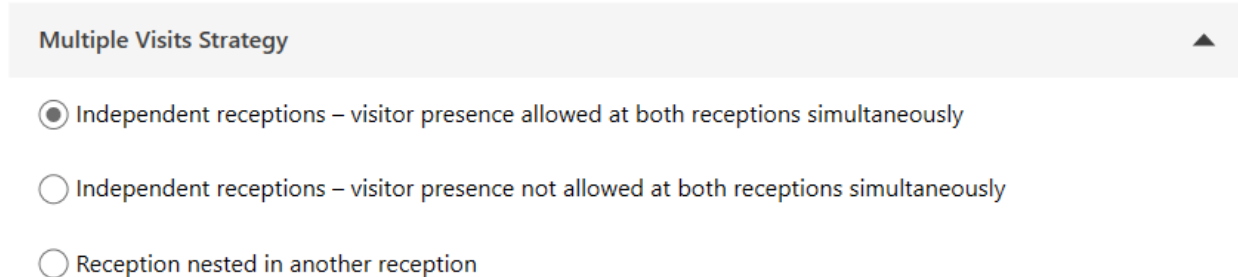
#### Additional fingerprint settings

<input type="checkbox"/> Left little	<input type="checkbox"/> Right little
<input type="checkbox"/> Left ring	<input type="checkbox"/> Right ring
<input type="checkbox"/> Left middle	<input type="checkbox"/> Right middle
<input type="checkbox"/> Left index	<input type="checkbox"/> Right index
<input type="checkbox"/> Left thumb	<input type="checkbox"/> Right thumb

Figure 68 - Additional fingerprint settings

### 3.2.16. Multiple Visits Strategy

In case the **Multi Receptions** setting is turned on (see Multi Receptions on page 36), a new tab for **Multiple Visits Strategy** is shown in the *General tab*. These are behavior settings for cases when a visitor passes through multiple receptions. There are three options:



Multiple Visits Strategy ▲

- Independent receptions – visitor presence allowed at both receptions simultaneously
- Independent receptions – visitor presence not allowed at both receptions simultaneously
- Reception nested in another reception

*Figure 69 - Multiple Visits Strategy*

- **Independent receptions** – a visitor can be present at two or more receptions simultaneously.
- **Independent receptions** – a visitor can not be present at two or more receptions simultaneously; if a visitor arrives at another reception and the receptionist creates a new visit while the visitor is in an active visit of another reception, the previous visit will close at the first reception.
- **Reception nested in another reception** – this setting is for situations where there are multiple receptions within an area and a visitor must pass through multiple receptions to enter a certain area. The order of receptions is decided by the entry time. If a visitor checks out midway through passing receptions, all visits that have recorded a later entry time than at the one being checked out from, will be closed.

e.g. Visitor 1 is trying to pass from Point A to Point B. To do so, he must pass and register at Reception A, Reception B and Reception C consecutively before arriving at Point B. When leaving, visits are closed according to at what time receptions recorded the visit (entry time), meaning, if the visitor leaves and passes Reception C, but checks out at Reception B, visits at Reception B and Reception C will close. The visit at Reception A will stay opened, because the visitor passed through Reception B and C later than Reception A, and only later times of the reception at which the visitor checks out will be closed.

### 3.3. Credentials

The *Credentials Tab* enables an administrator to view the list of available cards for the selected reception. It is possible here to: **search cards**, **add cards**, **remove cards**, **generate cards**, **move cards**, **view card** and **view card holder information**.

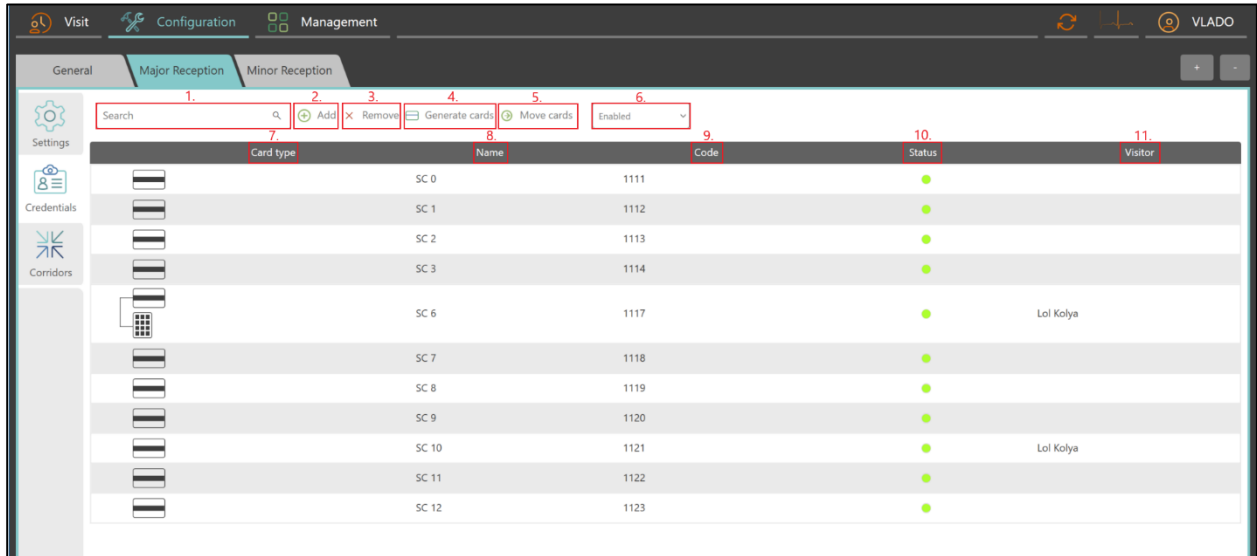
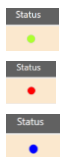


Figure 70 - Credentials Tab

1. **Search Tab:** Allows an administrator to search through cards.
2. **Add:** Button that opens wizard for assigning credentials to a reception.
3. **Remove:** Button for unassigning credentials from a reception
4. **Generate Cards:** Button for generating cards.
5. **Move Cards:** Button moving cards from reception to a reception.
6. **Card Type:** Column displays the selected card type.
7. **Name:** Column displays the selected card name.
8. **Code:** Column displays the selected card code.
9. **Status:** Column displays the current status of a certain card. There are three possible status colors:



**Green:** The card is enabled.

**Red:** The card is disabled.

**Blue:** The card is lost.

10. **Visitor:** Column displays the name of a card holder.

### 3.3.1. Assigning Cards to Reception

To assign cards to the opened reception, click on the **+** **Add** button. This will open a pop-up window, where an administrator can choose from one or more already existing cards from C4 and allocate them to the selected reception.

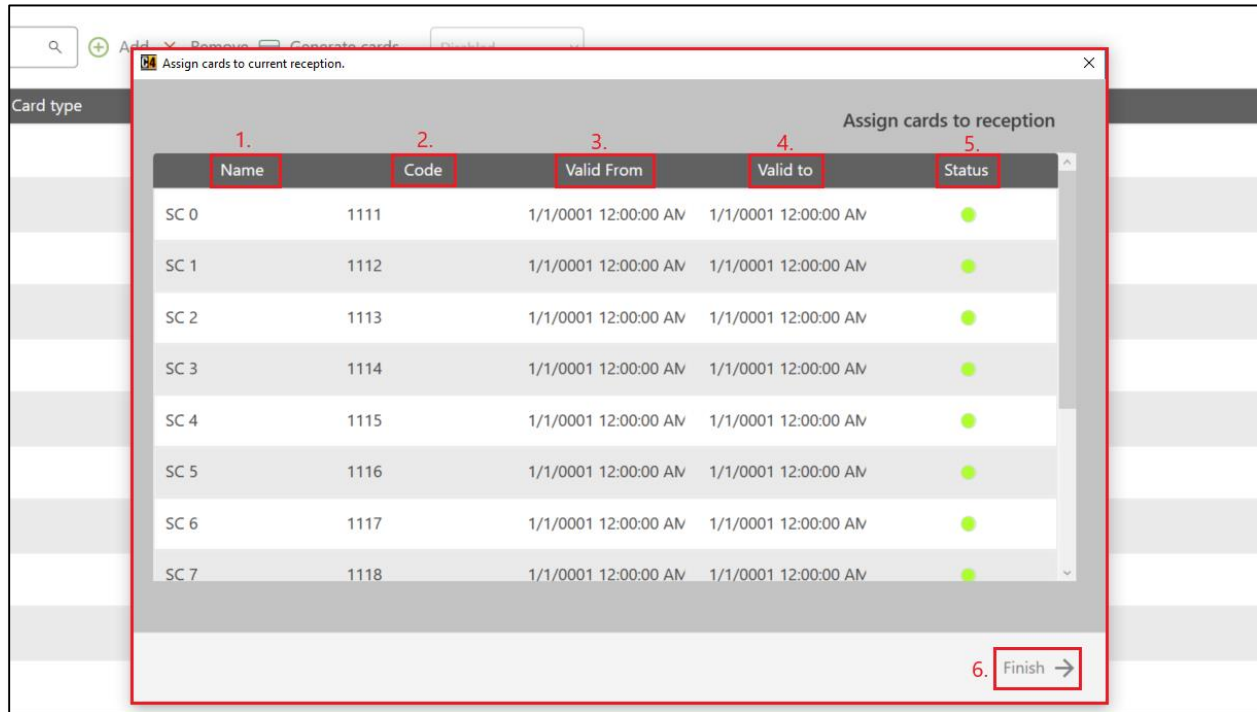


Figure 71 - Assigning Cards To Reception pop-up window

1. **Name:** Column displays the card name.
2. **Code:** Column displays the card code.
3. **Valid from:** Column indicates the start of validation period of a card.
4. **Valid to:** Column indicates the end of validation period of a card.
5. **Status:** Column displays the current status of a certain card. There are three possible status colors:



**Green:** The card is enabled.

**Red:** The card is disabled.

**Blue:** The card is lost.

6. **Finish:** Clicking on the **→ Finish** button will complete the whole process.

### 3.3.2. Unassigning Credentials from Reception

To unassign credentials from a reception, click on the **×** **Remove** button while the card is selected. It will remove the card from the list of cards allocated to the selected reception. It is possible to unassign more cards at once by multi selecting them.

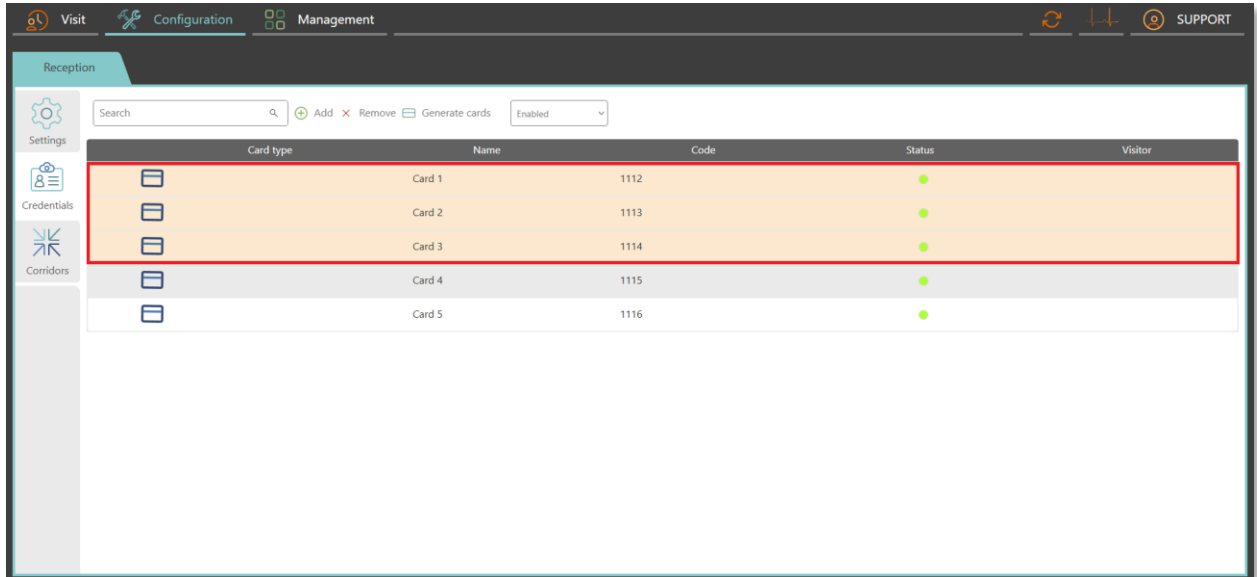


Figure 72 - Unassigning credentials from reception process

### 3.3.3. Generating New Cards

To generate a new card, click on the **Generate Cards** button which will open a pop-up window, where an administrator can choose the amount of cards to be generated, card name and card type.

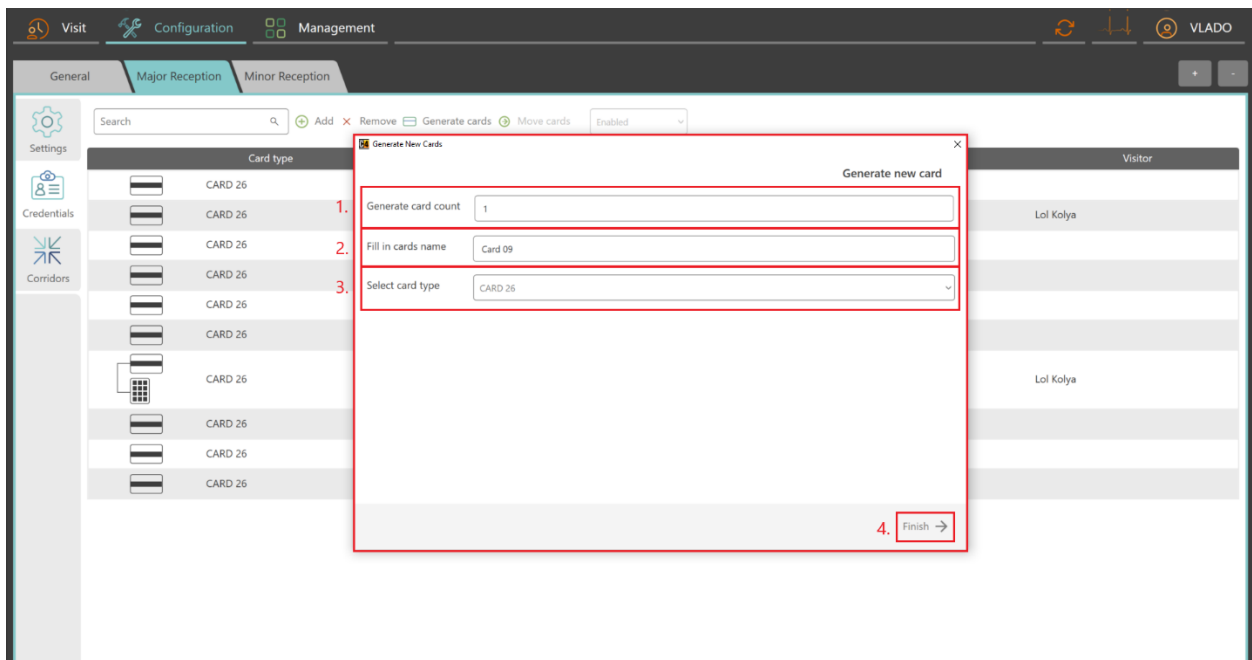


Figure 73- Generating new cards pop-up window

1. **Generate Card Count:** Digit in this field indicates the number of cards which are going to be generated.
2. **Fill in Cards Name:** Field defines card name.
3. **Select Card Type:** Combo box enables an administrator to preview available card types and select one.
4. **Finish:** Clicking on the button will finish the process.

### 3.3.4. Moving Cards

To move a card, click on the **Move Cards** button, which will enable an administrator to move allocated cards from one reception to another reception. This is done by selecting the card/s and then clicking on the **Move Cards** button which will open a pop-up window, where they can choose the destination reception.

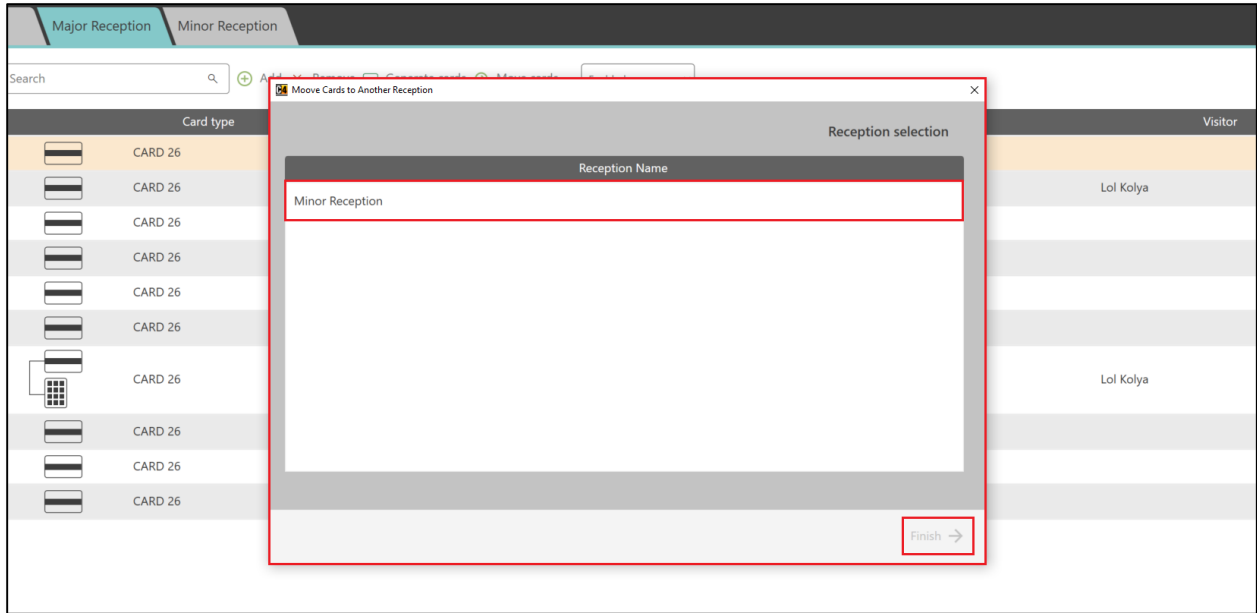


Figure 74 - Moving cards pop-up window

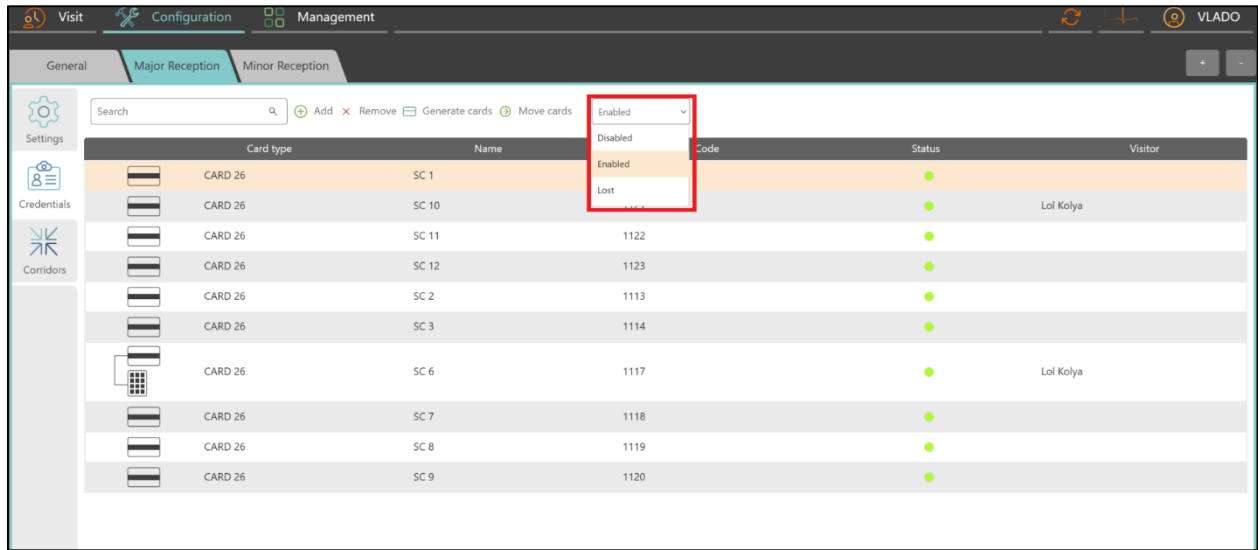
### 3.3.5. Status of Card

**Status of card** allows an administrator to set the status of a card. The available status options are:

**Disabled** – Card cannot be used.

**Enabled** – Card can be used.

**Lost** – Card is temporary disabled until found.





### 3.4. Corridors

The *Corridors Tab* enables an administrator to set up groups of doors and access points, which are predefined for the given reception. An administrator is able to create new corridors, which can then be used by a receptionist when registering a new visit.

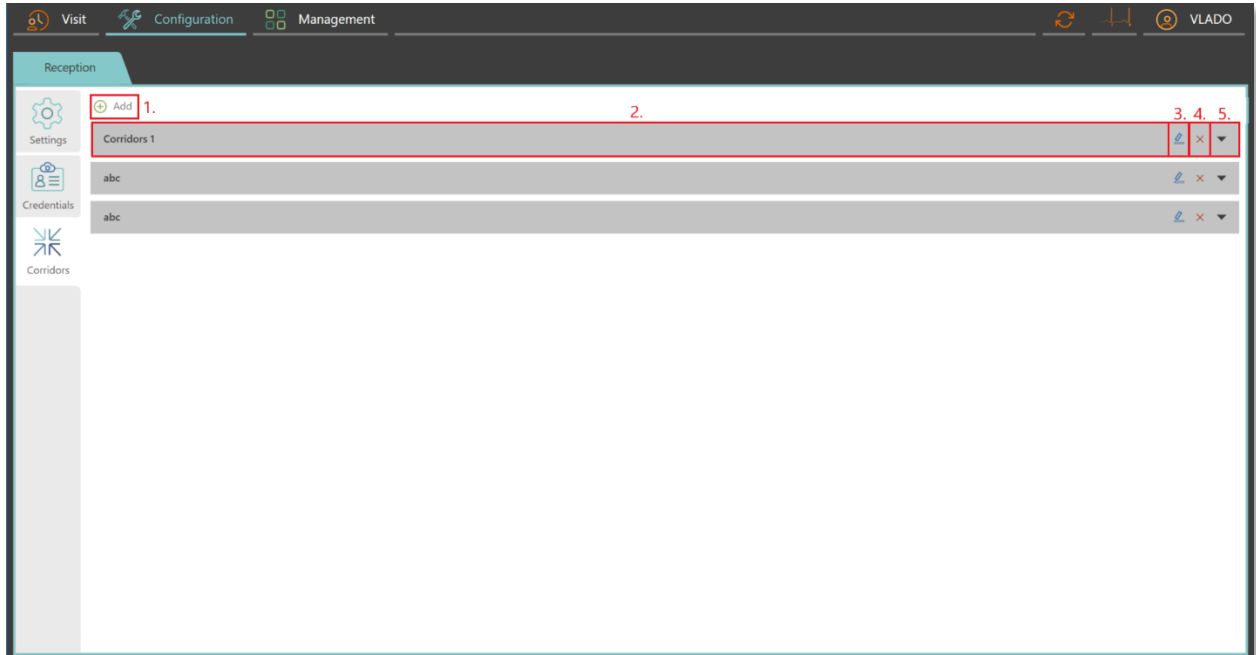


Figure 75 - Corridors Tab

1. **Add:** Button for adding existing corridors and creating new corridors.
2. **Corridor Tab:** Represents created corridors by an administrator. By clicking on this tab, all access points included in the selected corridor will be displayed.

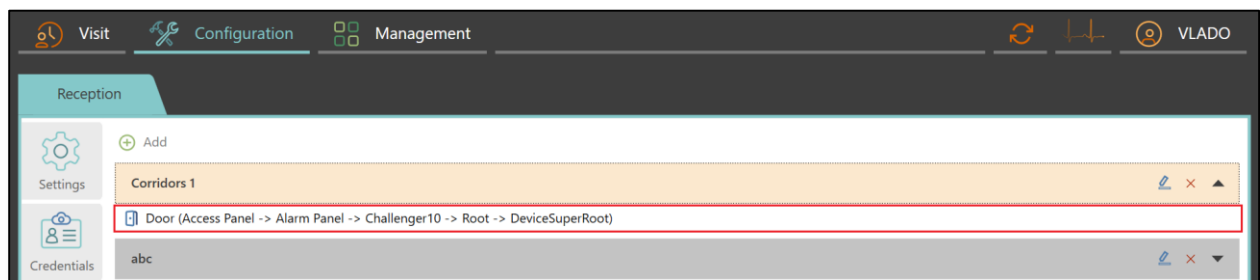


Figure 76 - Corridor Tab description

3. **Modify Corridor:** Button for modifying of corridors.
4. **Remove Corridor:** Button for removing of corridors.
5. **Arrow:** Serves as an indicator whether it is clicked on a corridor by an administrator or not:

▼ **Arrow pointing down:** It indicates, that it is not clicked on that specific corridor.

▲ **Arrow pointing up:** It indicates, that it is clicked on that specific corridor.

### 3.4.1. Add Existing Corridor from C4 (Access Level)

To add an existing corridor from C4 (Access Level) click the **+** **Add** button. The following wizard will open:

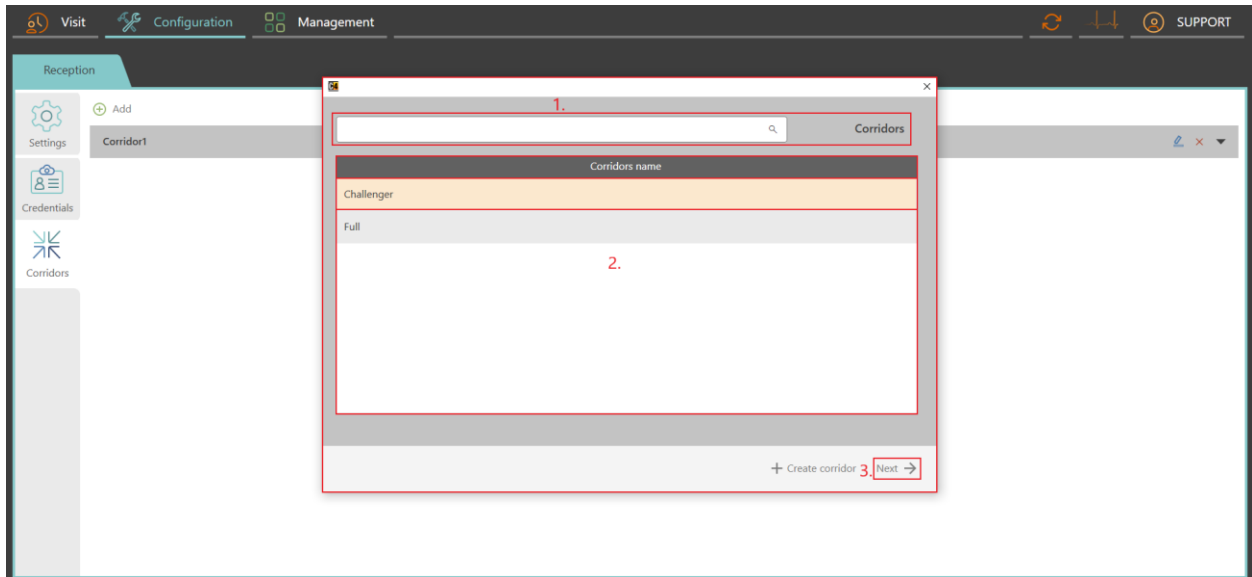


Figure 77- Add existing corridor from C4 pop-up window

An administrator has various options in this window:

1. **The Search Bar:** Serves for searching from the list of already created corridors.
2. **Corridor Names:** The list of already created corridors.
3. **Next:** By clicking on one of already created corridors and then pressing the **Next** button will open the following pop-up window:

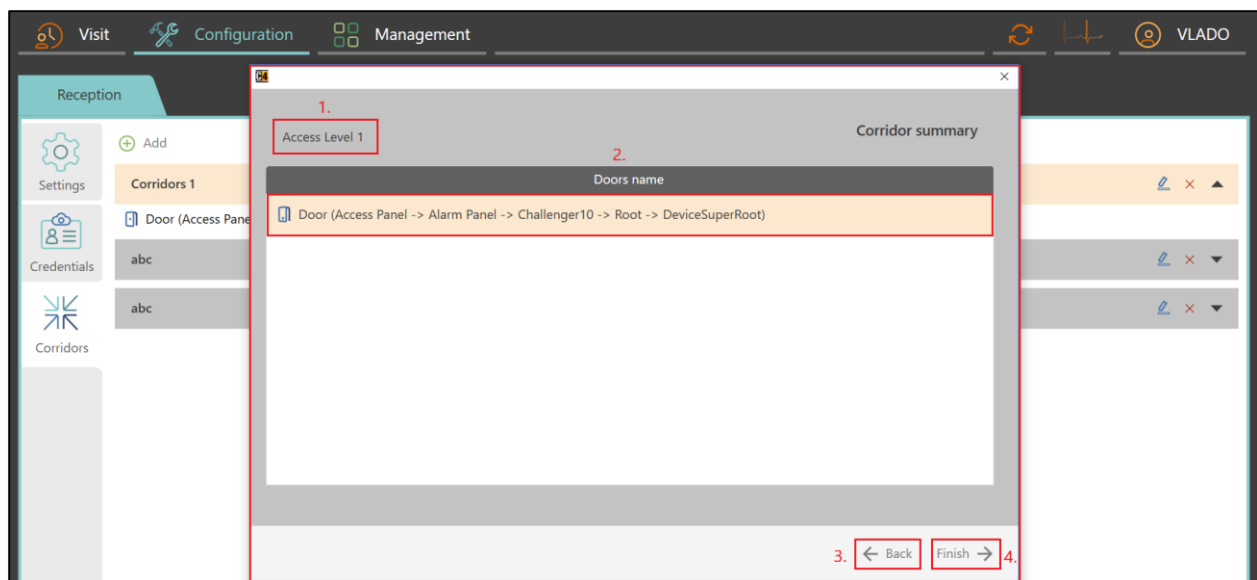


Figure 78 - Adding existing corridor wizard

1. This field displays the name of a selected corridor.

2. This tab displays the access points within the corridor.
3. Clicking on the **← Back** button will return to the previous step.
4. Clicking on the **→ Finish** button will finish the creation process.

### 3.4.2. Create New Corridor

To create a new corridor from C4 (Access Level) click on the **+ Add** button, and the following pop-up window will open:

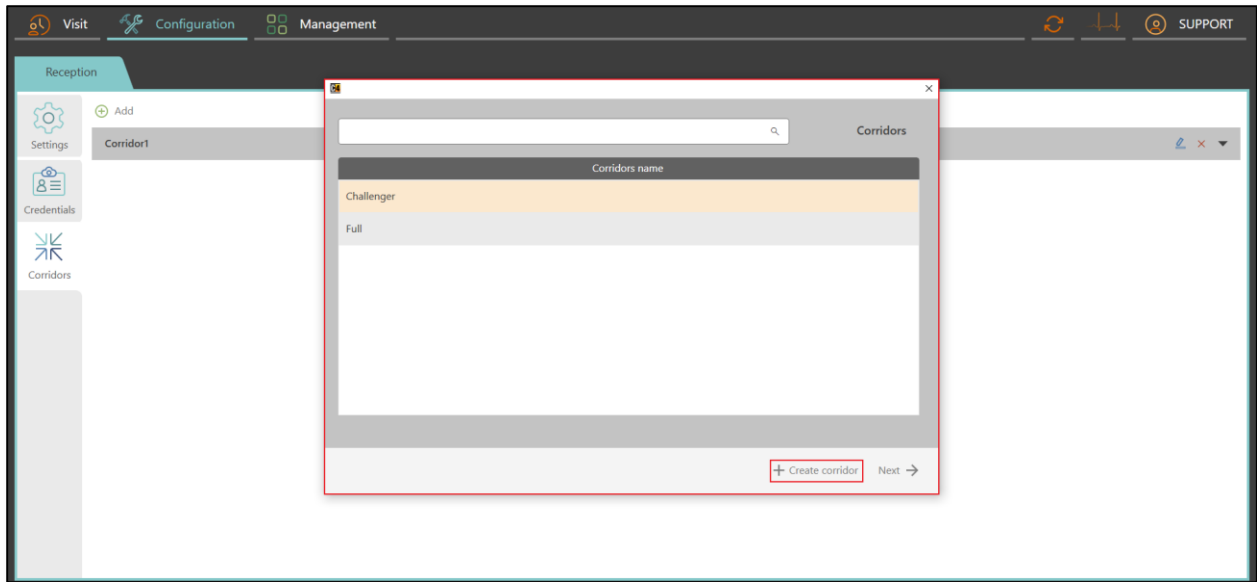


Figure 79 - Create new corridor pop-up window

Clicking the **+ Create corridor** button will open the corridor creation wizard. In this wizard it is possible to add or remove access points of a corridor:

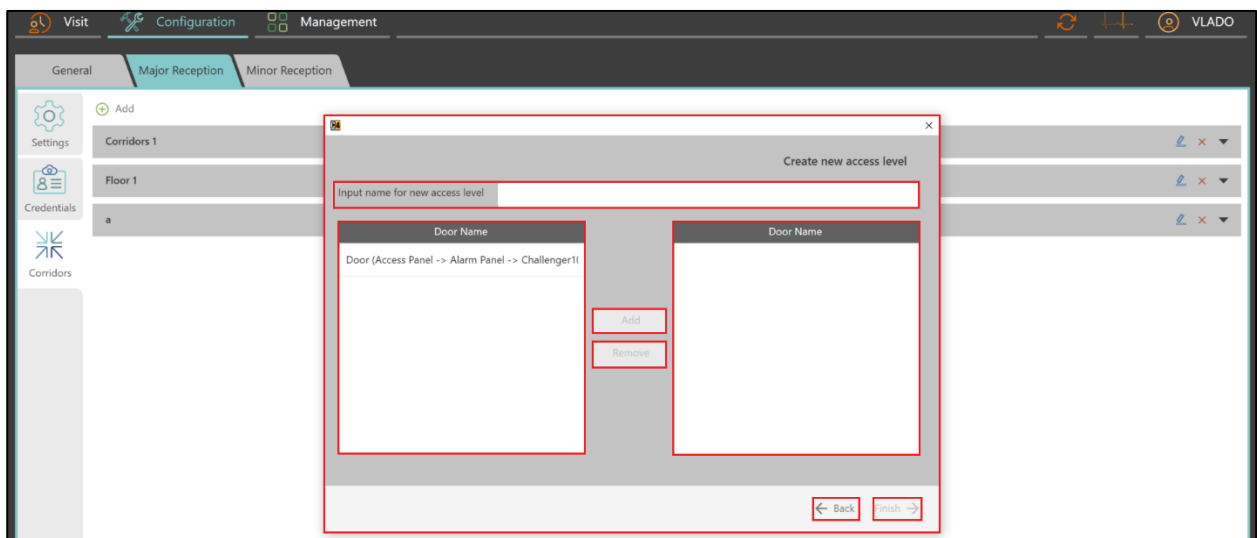


Figure 80 - Adding and removing access points of a corridor wizard

**Add** Button adds selected access points to a corridor.

**Remove** Button removes selected access points of a corridor.

Finish the process by clicking the **Finish** button. In the case that you need to return to the previous step, click on the **Back** button.

### 3.4.3. Modify Corridor

To modify an existing corridor, click on the **Modify** button of the given corridor. The following corridor editing wizard will open:

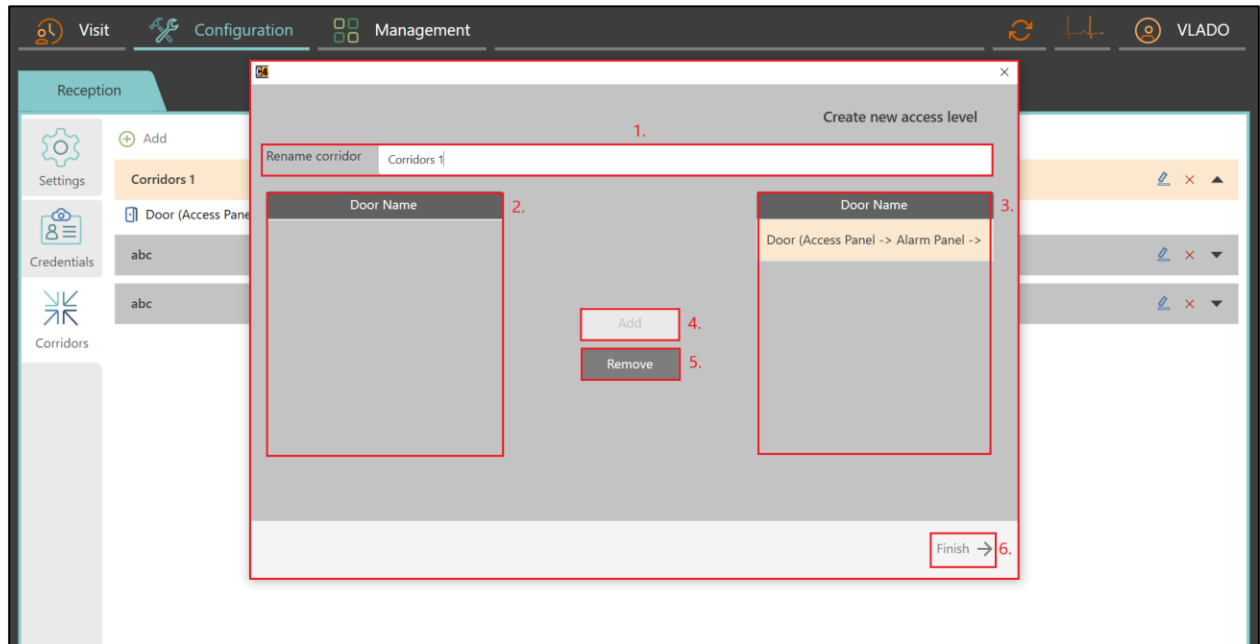


Figure 81 - Modify corridor pop-up window

1. Field with a name of selected corridor. It is also possible to rename an existing corridor in this tab.
2. Selection of available access points which can be allocated to a corridor.
3. Access points which have been already allocated to a corridor.
4. Add button serves for adding access points to a corridor.
5. Remove button serves for removing of access points of a corridor.
6. **Finish** button will complete the whole process.

### 3.4.4. Remove Corridor

By clicking on the **X** button, an administrator will remove an existing corridor.

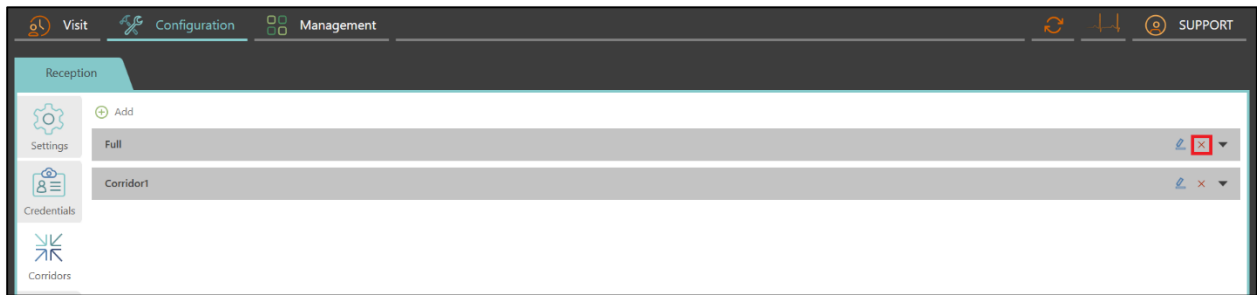


Figure 82 - Remove Corridor button

## 4. Management – Reception Manager

The role of a reception manager is to manage receptions. *The Management Panel* enables them to view information about: **visitors, scheduled visits, analytics information** (regarding the visit activity for all receptions), **add** and **modify document templates**.

The *Infotypes Panel* on the *Management Panel* provides the option to choose from the *Reports*, the *Analytics*, the *Documents*, The *Badging*, The *Credentials* and the *Safety Tr. Tabs*, which are described in the following sections.

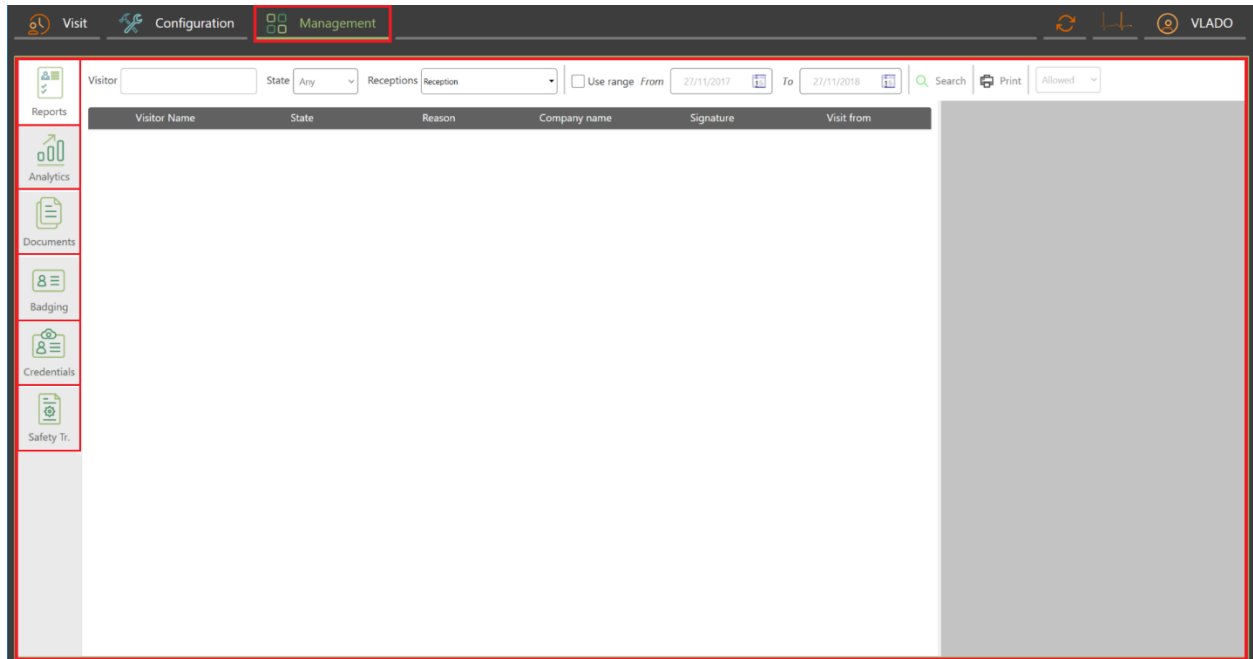


Figure 83 - Management Panel

## 4.1. Reports

The *Reports Tab* enables a reception manager to search through the visitor database and view information about them and their visits.

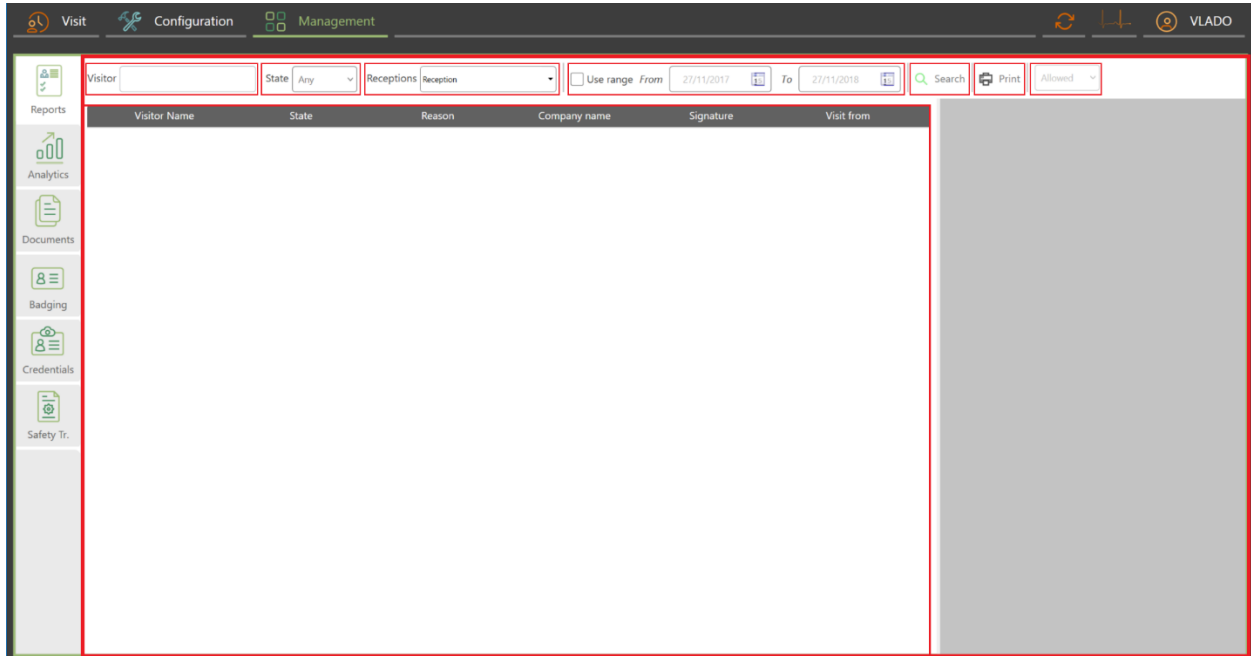


Figure 84 - Reports Tab

### 4.1.1. Filtering Reports

#### Visitor Search Bar

The **Visitor Search Bar** enables a reception manager to search through all visits for a certain visitor. By typing a name inside the search tab and clicking the **Search** button, the visit search results will appear in the record list.

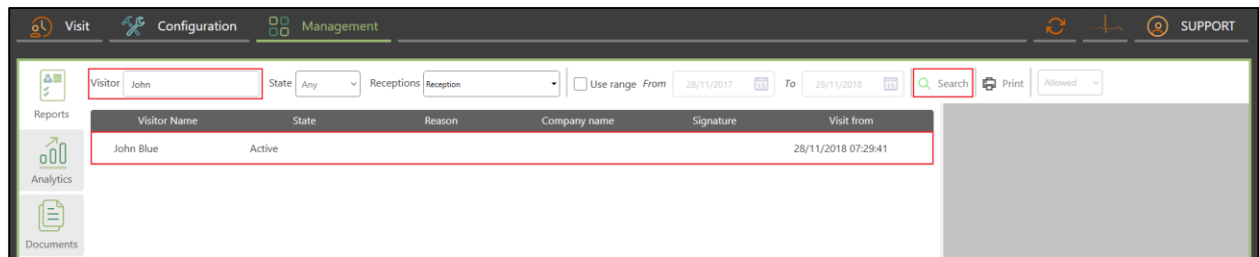


Figure 85 - Process of using Visitor Search Bar

#### State

The **State** tab enables a reception manager to filter search results by choosing, what kind of visits they are looking for. There are five options:

**Active** – All active visits will appear.

**Canceled** – All scheduled visits that have been canceled will appear.

**Closed** – All closed visits will appear.

**Scheduled** – All scheduled visits will appear.

**Any** – All visit types of state will appear.

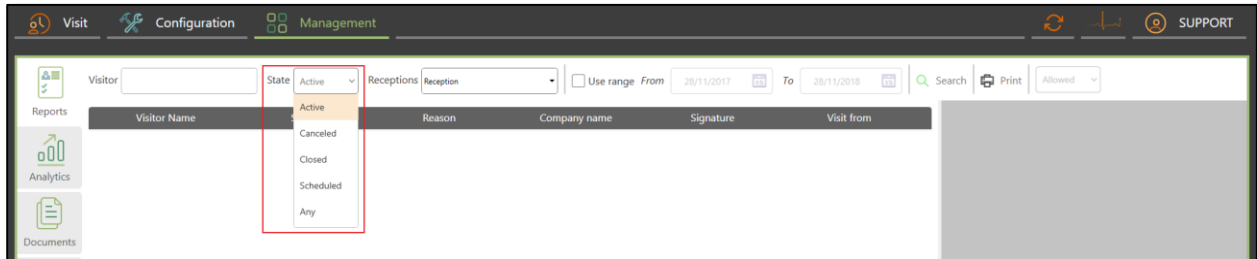


Figure 86 - List of available states

## Receptions

The **Receptions** combo box enables a reception manager to choose a reception for which visit information should be displayed. It can be either displayed from selected receptions or all receptions.

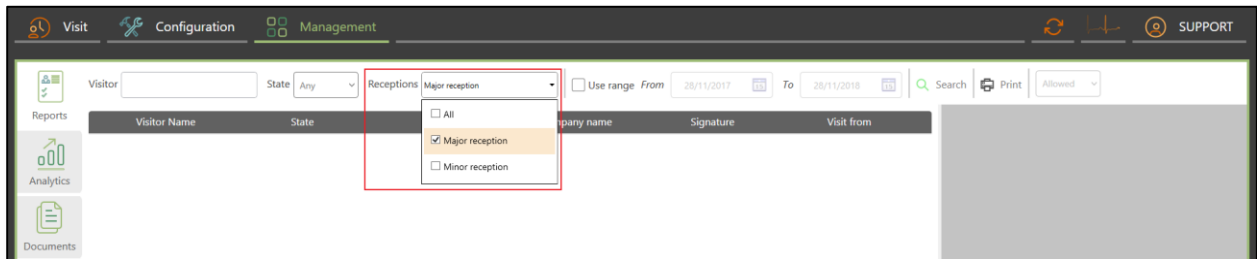


Figure 87 - Reception selection

## Use Range

The **Use Range** checkbox enables a reception manager to use a time range to filter search results.

When the checkbox is not checked, it is by default set to display all visits until the present time.

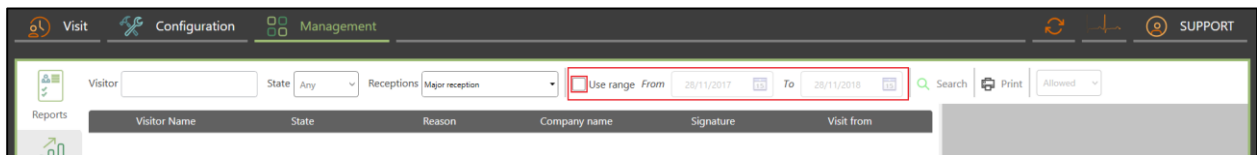


Figure 88 - Use Range checkbox

If they want to narrow this range and only search visits from a certain time period (e.g. only results from the past two weeks or a certain day) check the **Use Range** checkbox. This allows a reception manager to set the **Date from**  and **Date to**  fields.



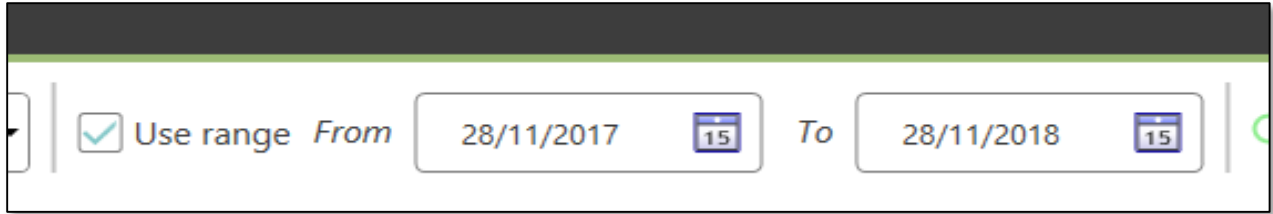



Figure 89 - Date selection

There are two ways of selecting the date values:

**Selecting a date with icon** - By clicking on the  icon, a reception manager can select a specific date from the calendar.

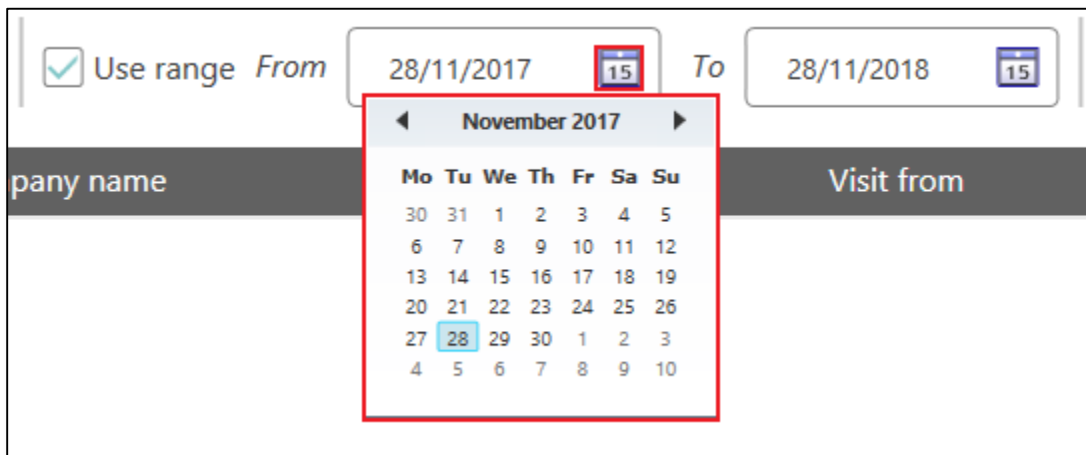


Figure 90 - Selection of specific date from the calendar

**Selecting a date by typing** - A reception manager can directly type the desired date into the field.



Figure 91 - Typing desired date into the field

## Search

The  **Search** button enables a reception manager to execute the search.

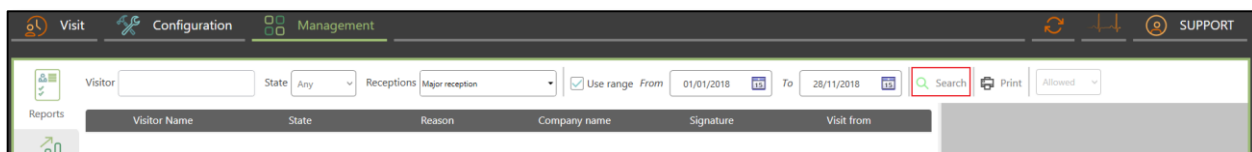



Figure 92 - Execute button for searching

## Print

To **Print** a report containing information from the record list of search results, click the  **Print** button.

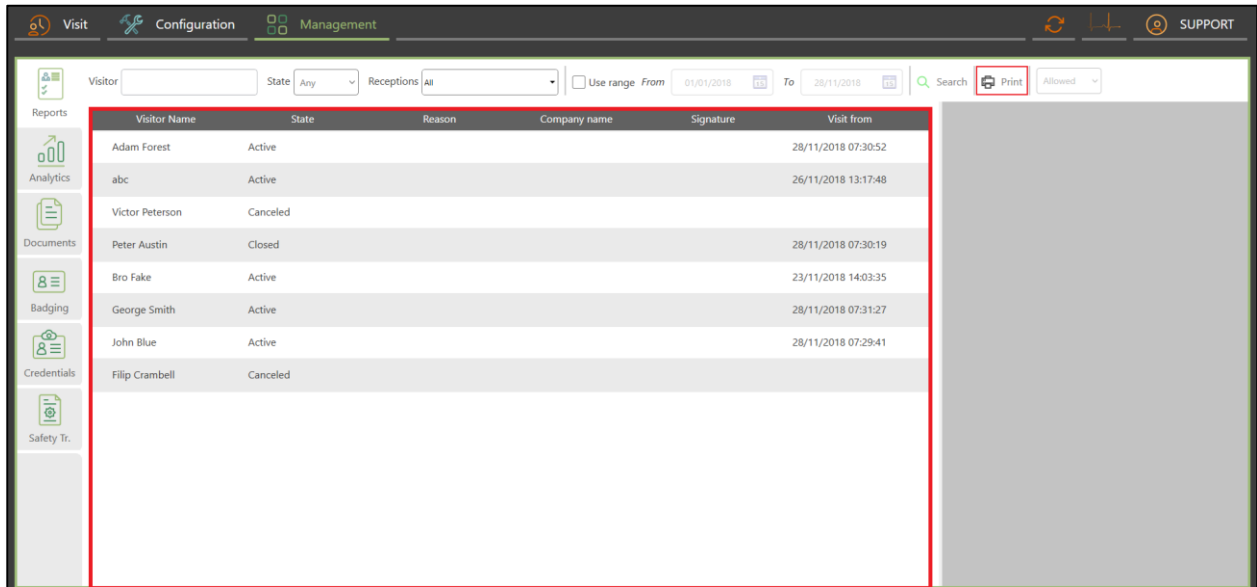


Figure 93 - Print button position

## Records List

The **Records List** displays the search results. Description of all columns is provided below.

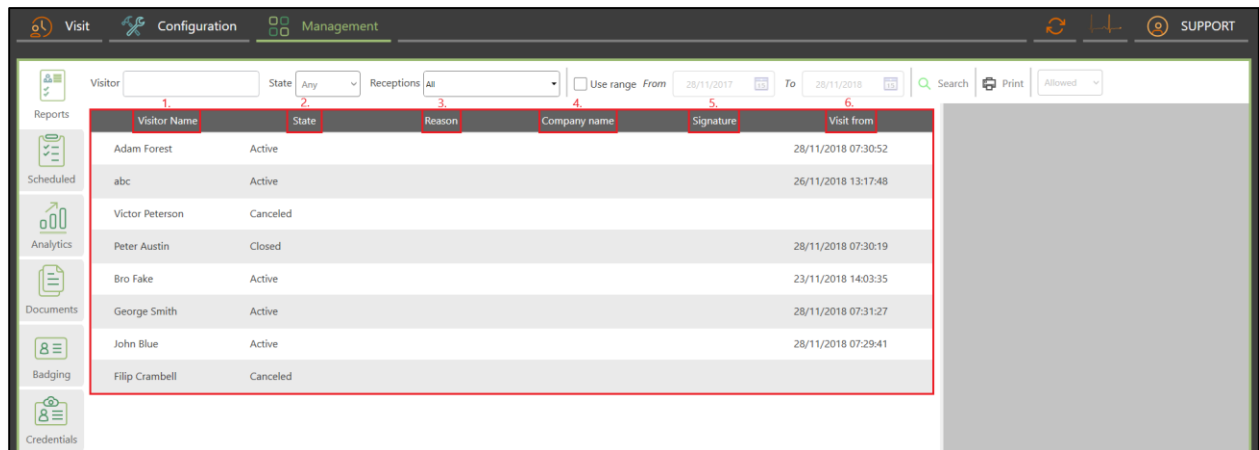


Figure 94 - Records List

1. **Visitor Name:** Column displays a name of a visitor.
2. **State:** Column displays visit state.
3. **Reason:** Column displays a reason of a visit.
4. **Company Name:** Column displays the company name of a visitor.
5. **Signature:** Column displays a picture of digitally captured signature of a visitor.

6. **Visit from:** Column displays the date when the visit had begun.

Selecting a visitor from the **Records List** will display the *Details Panel* on the right side of the screen, containing more information.

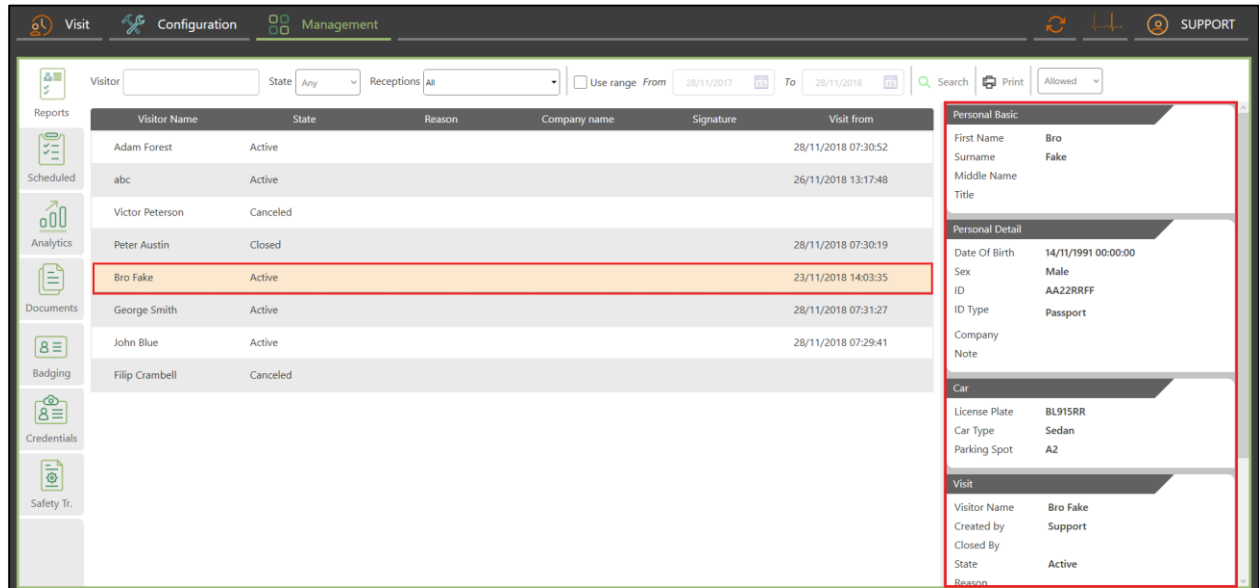


Figure 95 - Information about selected visitor on the right side of the screen

The scope of information displayed in the *Details Panel* depends on the set configuration.

---

**Tip:** This may be useful for checking whether a receptionist is filling visit information correctly.

---

## 4.2. Analytics

The *Analytics Tab* provides a reception manager with analytical information and statistics regarding the visits activity of a selected reception. It is also possible to view a comparison of analytical information between receptions. The *Analytics Tab* is divided into the following two parts: **Visit Activity of the Reception** and **Visit Activity Comparison Of The Receptions**.

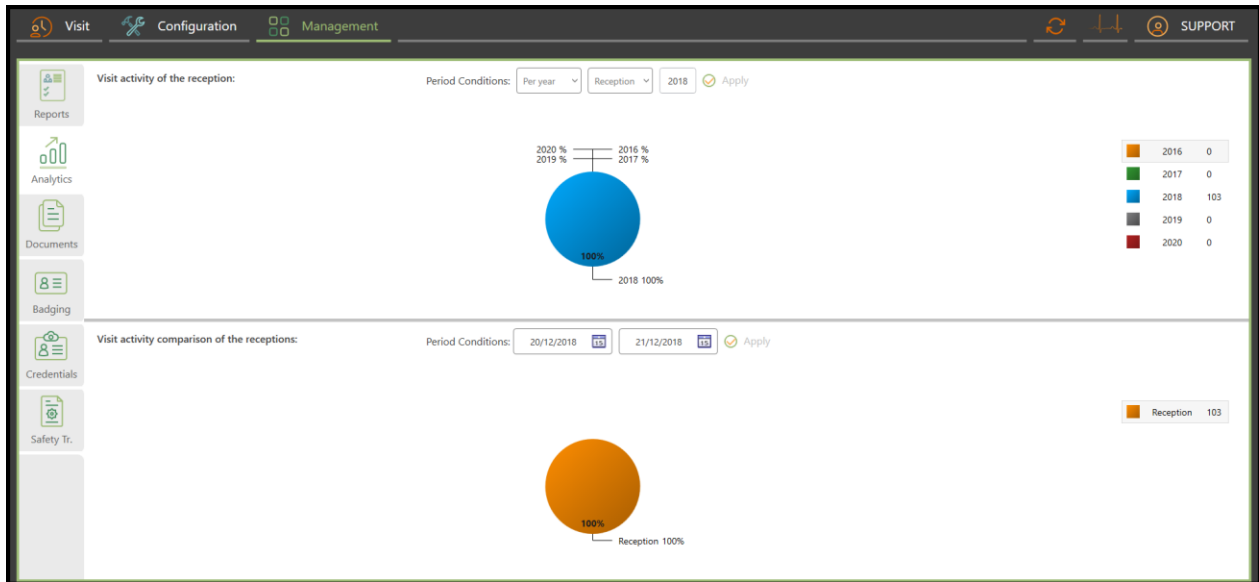


Figure 96 - Analytics Tab

### 4.2.1. Filtering Visit Activity of the Reception

Visit activity of the reception provides a reception manager with visit statistics of a selected reception.

#### Period Conditions

Enables a reception manager to choose a time frame, which provide filtered information and a corresponding graph. There are two combo boxes:

**Time Period** – It is possible to choose whether the graph displays visits based on a year, a month, or weeks.

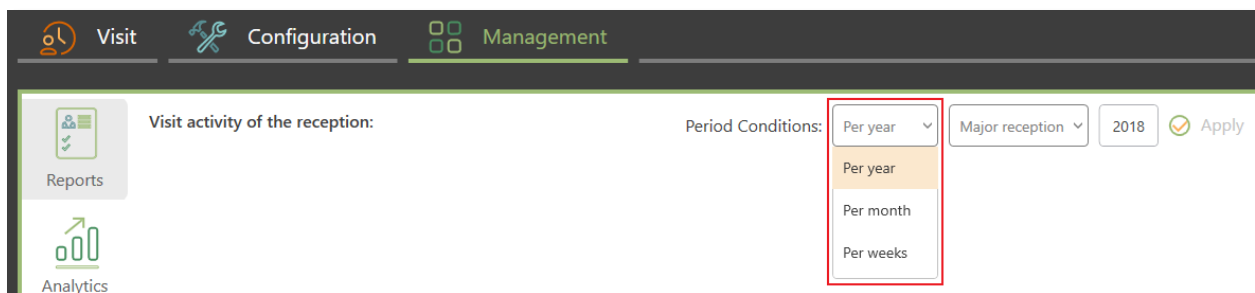


Figure 97 - Time Period combo box

**Reception Selection** – Enables a reception manager to choose a reception.

After a reception manager selects the time period and reception selection, they can select a year for which visit information will be displayed.

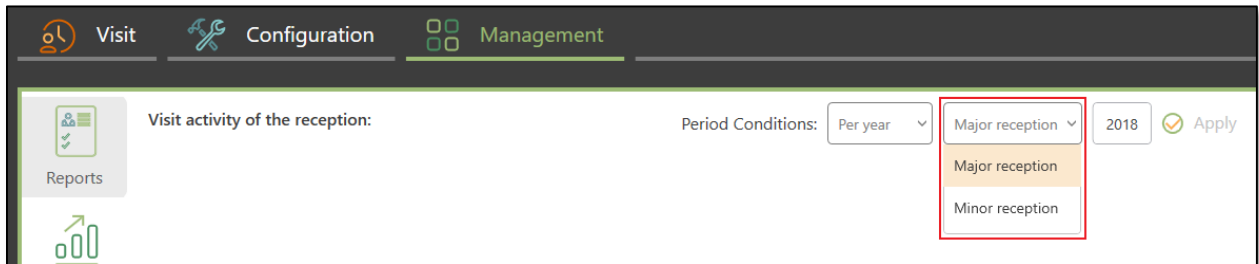
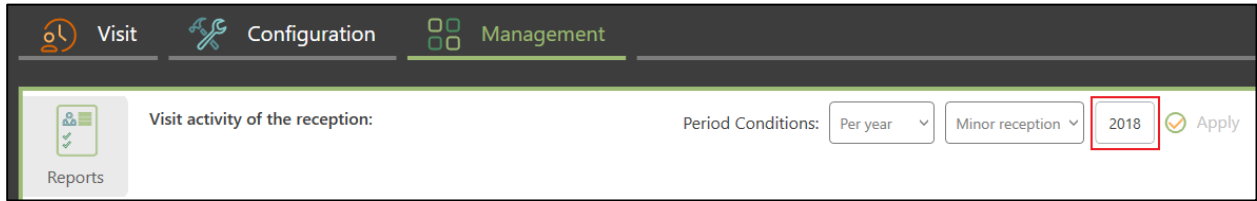



Figure 98 - Reception Selection combo box

Figure 99 - Year Selection box

Apply the changes by clicking on the  **Apply** button.

## Graph

The graph is the output of filled information filtered by the **Period Conditions**.

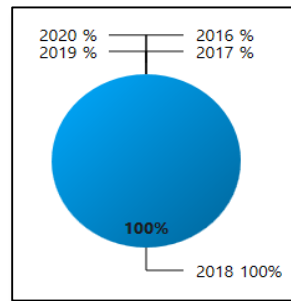


Figure 100 - Graph

## Year/Month/Day window

This window changes depending on the **Period Conditions** configuration. There are three possible windows which can be displayed:

2016	0
2017	0
2018	8
2019	0
2020	0

Figure 103 - Years

January	0
February	0
March	0
April	0
May	0
June	0
July	0

Figure 101 - Months

1-7	0
8-14	0
15-21	0
22-28	8
29-30	0

Figure 102 - Weeks

By selecting a given value, the graph will display results according to the selected year/month/weeks selection.

### 4.2.2. Filtering Visit Activity Comparison of The Receptions

Visit activity comparison of the receptions provides a reception manager with comparative information for visit statistics of all receptions.


## Period Conditions




Enables a reception manager to choose a time period for which the information should be filtered.

Period Conditions:      Apply

Figure 104 – Date selection

To set a specific time period, a reception manager has two options:

**Selecting a date with icon:** By clicking on the  icon, a reception manager can select a specific date from the calendar.

Period Conditions:      Apply

◀ June 2018 ▶

Mo	Tu	We	Th	Fr	Sa	Su
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

or reception %

Figure 105 - Selection of specific date from the calendar

**Selecting a date by typing:** A reception manager can directly type the desired date into the field.

Period Conditions:      Apply

Figure 106 - Typing desired date into the field

Changes are applied by clicking the  **Apply** button.

## Graph

The graph is the output of filled information from previous parts.

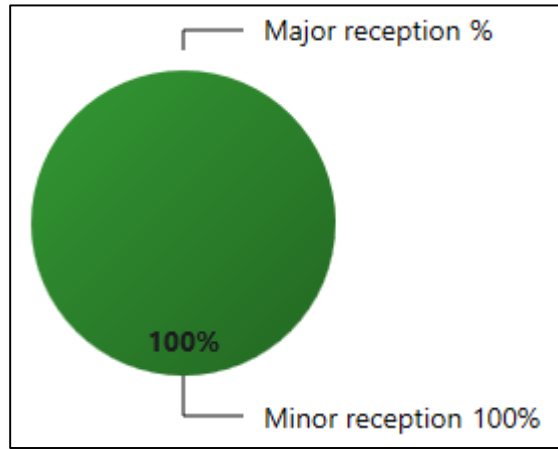


Figure 107 - Graph

## Select Window

A reception manager can choose, which receptions should be compared in the graph.

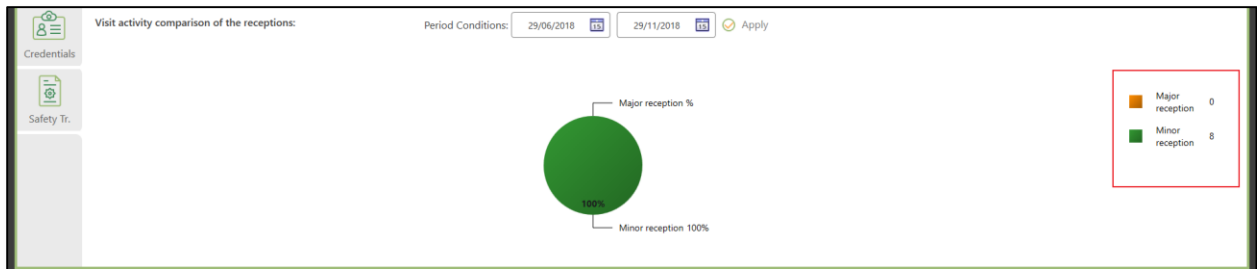


Figure 108 - Receptions selection for comparing



### 4.3. Documents

The *Documents Tab* allows a reception manager to **create**, **remove** or **modify** document templates. Documents can be signed by a visitor via a signature reader. All documents are created by a reception manager and used by a receptionist when creating a visit.

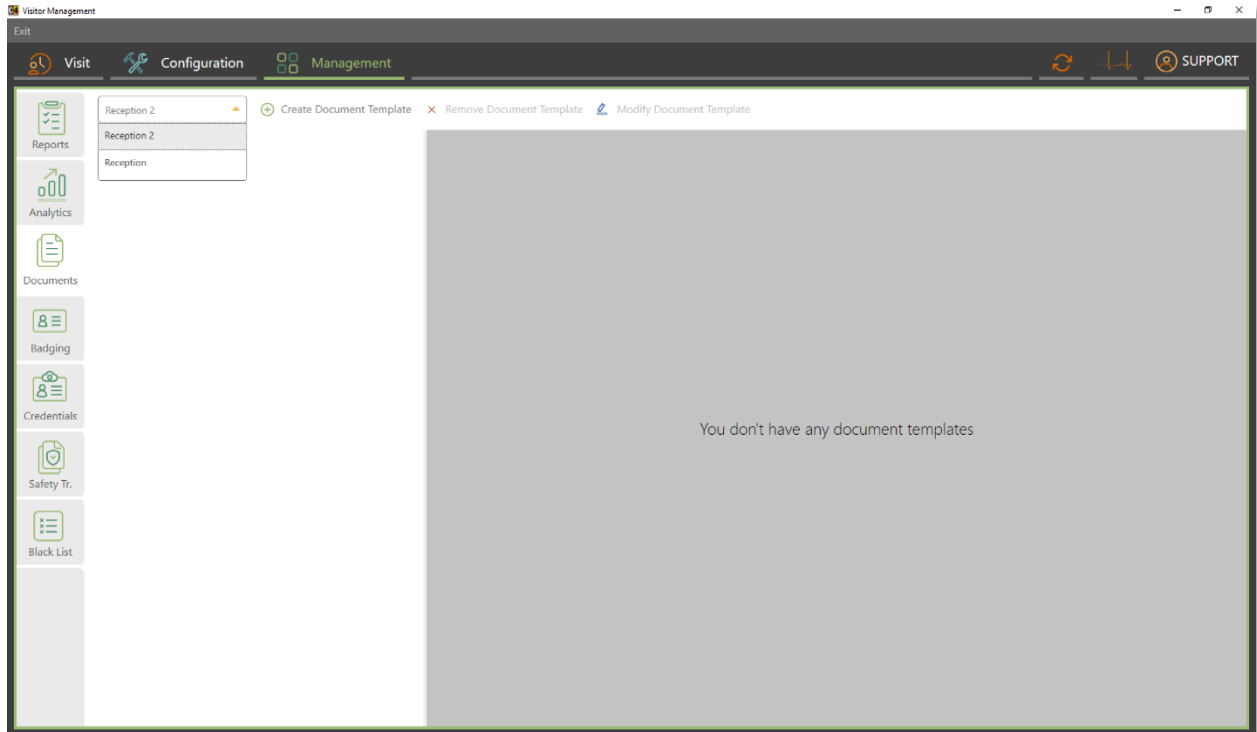




Figure 109 - Documents Tab

In case multiple receptions are used, the combo box at the top left of the *Infotypes Panel* is for selecting which reception's document templates should be displayed.

### 4.3.1. Create Document Template

A reception manager can create a document template by clicking on the  **Create Document Template** button. The following pop-up window will open:



The screenshot shows a 'Create New Document' dialog box. It features a title bar with the text 'Create New Document' and a close button (X). The main content area is divided into three numbered sections, each enclosed in a red box:

- 1.** Document Name: A text input field.
- 2.** Expiration Period: A text input field followed by an unchecked checkbox.
- 3.** Reception: A dropdown menu with 'Major reception' selected.

At the bottom right, there is a 'Next' button, also enclosed in a red box and labeled with '4.'.

Figure 110 - Create document template wizard

1. **Document Name:** A receptionist manger can name a document.
2. **Expiration Period:** By default, the validity of a signature on a document has no expiration period. A reception manager can remove validity of a signature manually. **Expiration Period** function enables a reception manager to set up an expiration period for the validity of a signature on a document and after the set period of time, the validity of a signature will expire automatically. For example, if the expiration period is set to 90 days, and a visitor visits a reception after 91 days, they will have to sign the document again. To enable this function, a reception manager has to check the checkbox and enter a number of days after which the validity of a signature expires.

Figure 111 shows a 'Create New Document' dialog box. It features a title bar with a close button. The main area contains three input fields: 'Document Name' (empty), 'Expiration Period' (with a checked checkbox and a text field containing '90' followed by 'Days'), and 'Reception' (a dropdown menu showing 'Major reception'). A 'Next' button is positioned at the bottom right.

Figure 111 - Selecting number of days in which will expiration happen

3. **Reception:** This combo box enables a reception manager to choose a certain reception or all receptions, to which the document should be available.

Figure 112 shows the 'Reception' dropdown menu. The dropdown is open, displaying three options: 'All', 'Major reception' (which is selected), and 'Minor reception'.

Figure 112 - Reception combo box

4. **Next:** After filling all the information, clicking on the **Next** button will open the document editor :

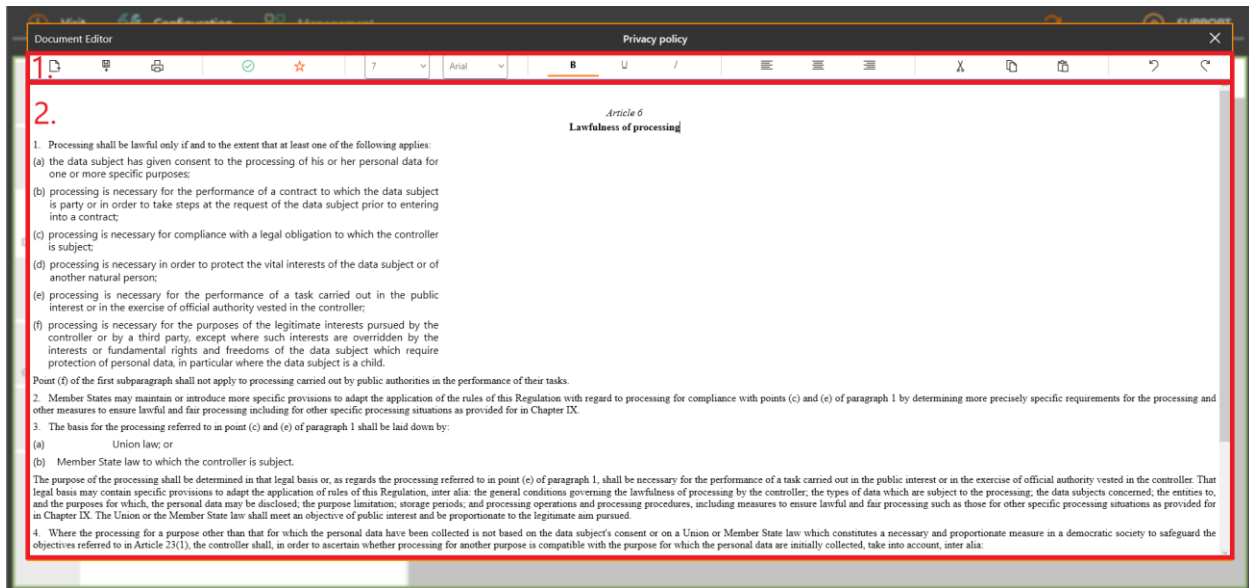













Figure 113 - Document Editor wizard


1. **Icons panel:** A reception manager has various options to edit a document template.

Icon	Description
	Import a word document into the Text field.
	Save template to file.
	Print template.
	Finish creating a document template.
	Cuts a selected text, which can then be pasted.
	Copy.
	Paste.
	Undo.
	Redo.
	Variables. Clicking on one of these variables will enable you to place it into the document template. These are then filled in with existing visitor information.

2. **Text field:** Area for text.

Whole process of a document template creation is finished by clicking on the  button.

### 4.3.2. Remove Document Template

A reception manager can remove a document template by clicking on a document and then clicking on the  **Remove Document Template** button.

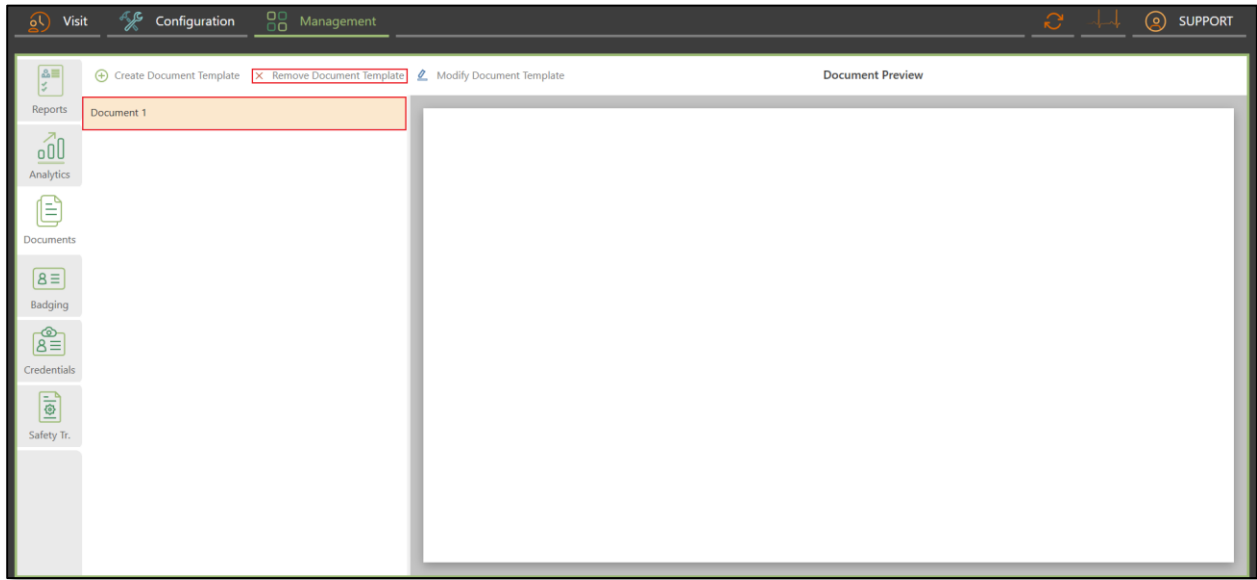



Figure 114 - Process of removing document template

### 4.3.3. Modify Document Template

A reception manager can modify a document template by clicking on the  **Modify Document Template** button. After clicking on it, the pop-up window similar to one while creating a new document template will open. **Apply** – This button will save all changes made to the **Document name, Expiration Period and Reception** selection.

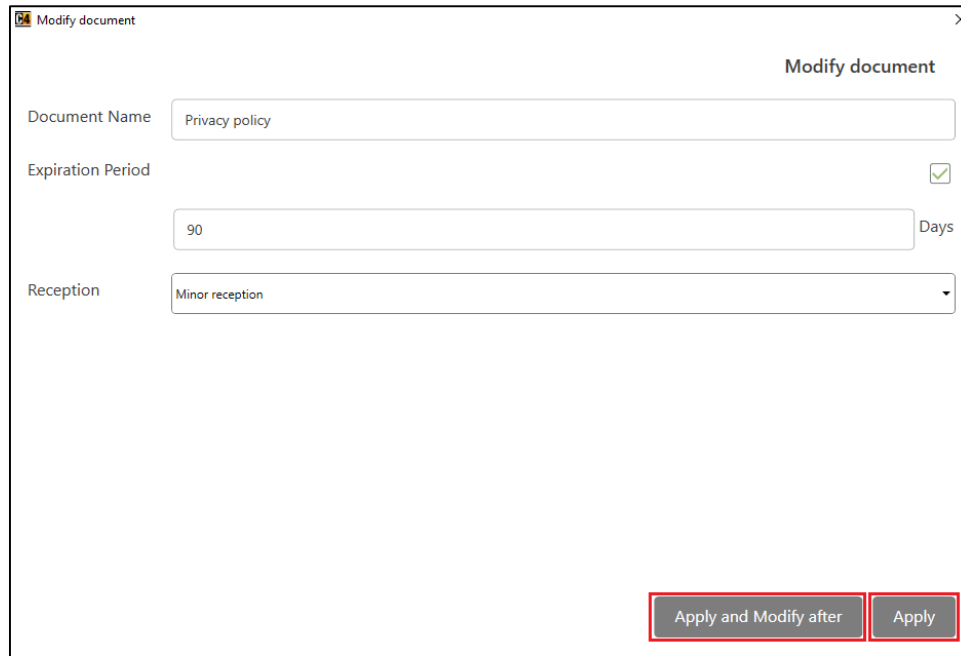


Figure 115 - Modify document template editor

**Apply and Modify after** – This button will save all changes to the Document Name, Expiration Period, Reception, and then open the document editor wizard:

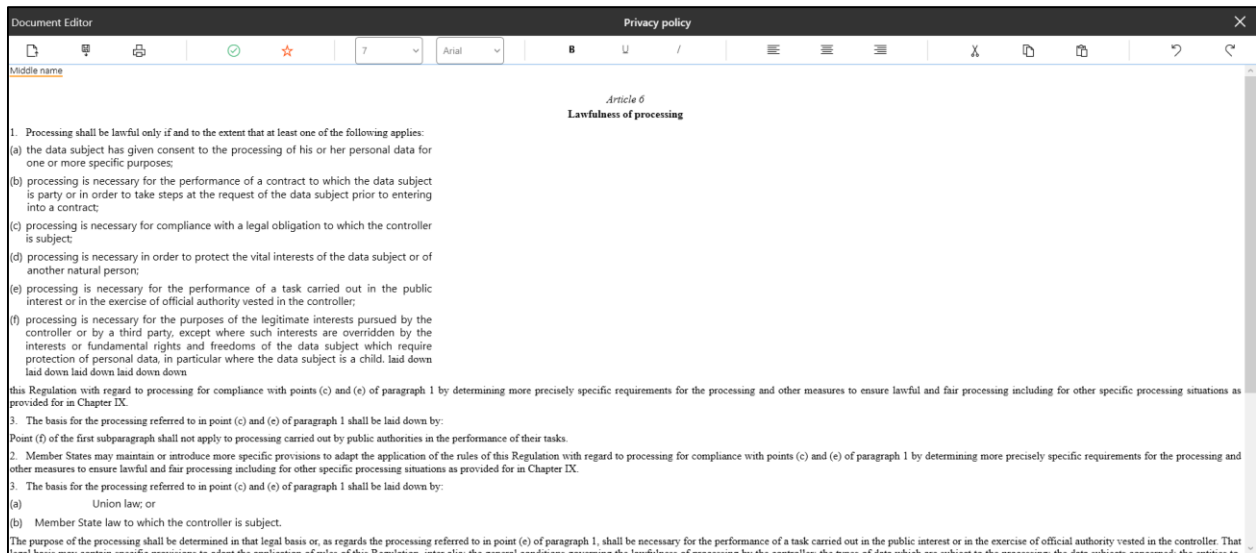


Figure 116 - Document editor

Once you are finished editing, click on the  button.

#### 4.3.4. List of Document Templates and Document Preview

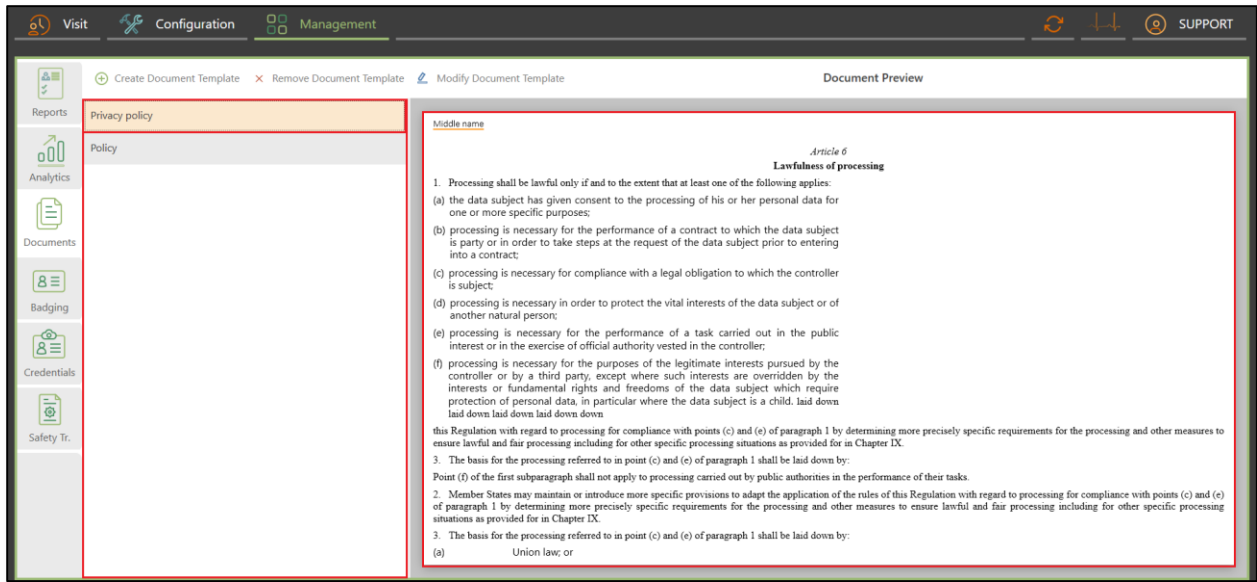


Figure 117 - List of document templates and Document Preview

The screenshot above displays two parts of the *Documents Panel*. The left side displays the list of all available documents. If a reception manager selects a document from the list, the right side of the *Infotypes Panel* displays the whole content of the selected document there. It is possible to scroll down through the document by scrolling the scroll wheel, or by using multi-touch gestures.

## 4.4. Badges

The *Badge Tab* allows a reception manager to create and remove badge templates. All badges are created by a reception manager and used by a receptionist at receptions.

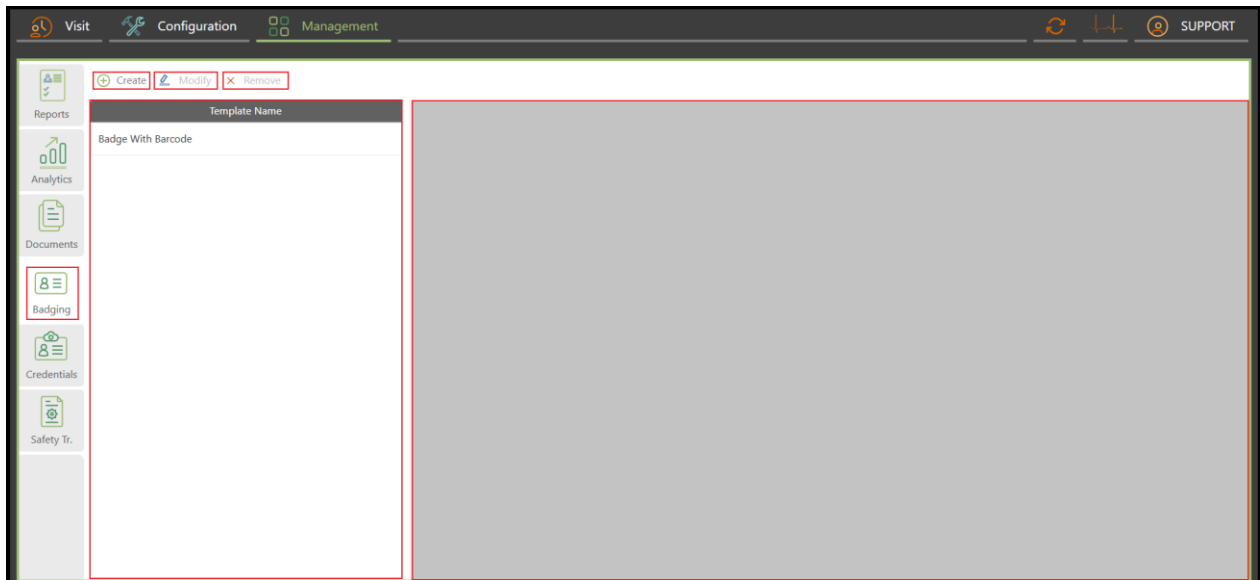


Figure 118 - Badge Tab

### 4.4.1. Create Badge Template

A reception manager can proceed to a badge template creation by clicking on the **+** **Create** button. After doing so, the Badge editor will open:

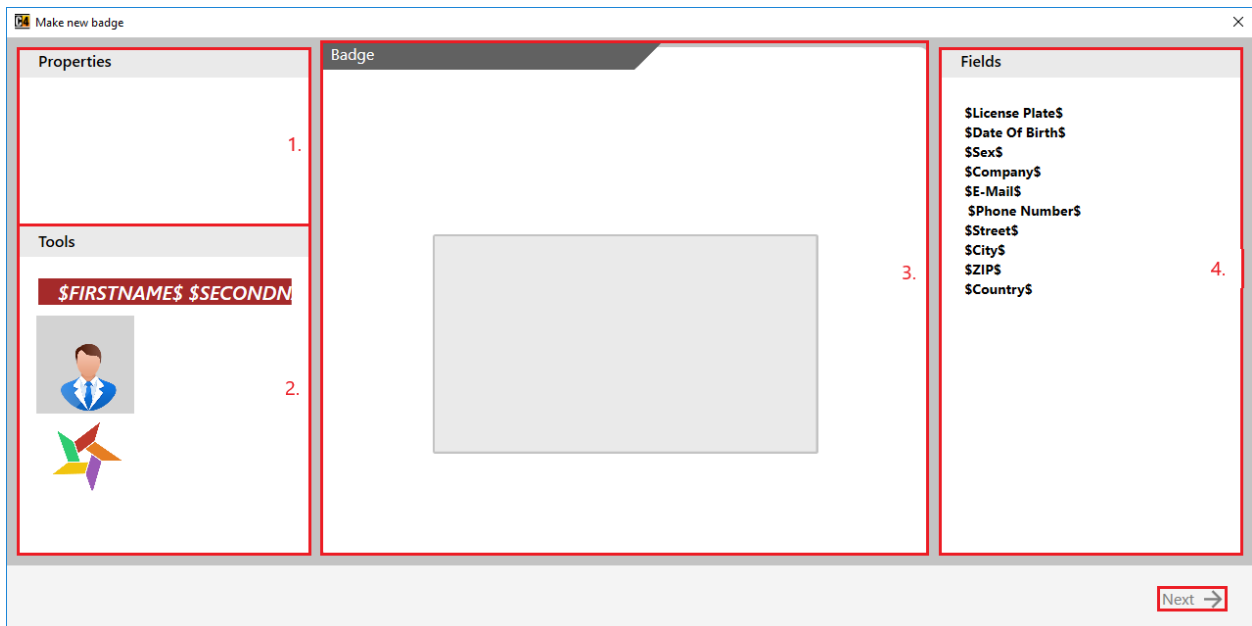


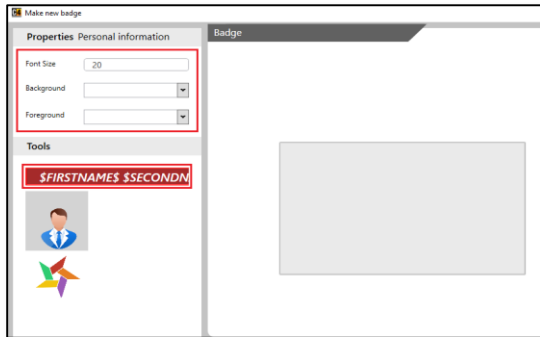
Figure 119 – Badge editor



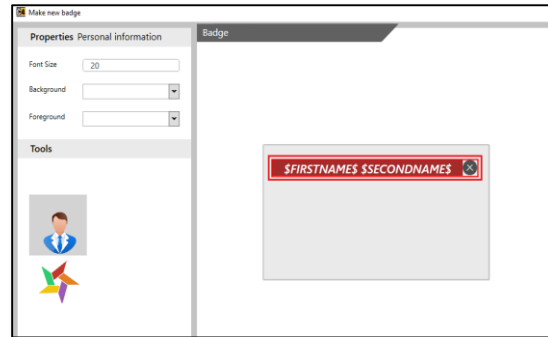
1. **Properties:** This window represent properties of a selected item from **Tools** or **Fields**. It is possible to modify certain properties for each object.
  2. **Tools:** A reception manager is able to choose from three types of tools, which they can add onto a badge:
- 

## Personal Information

Personal Information consists of **First name** and **Surname**.



Clicking on the **Personal Information** panel will enable you to modify its **Font Size**, **Background color** and **text color**.

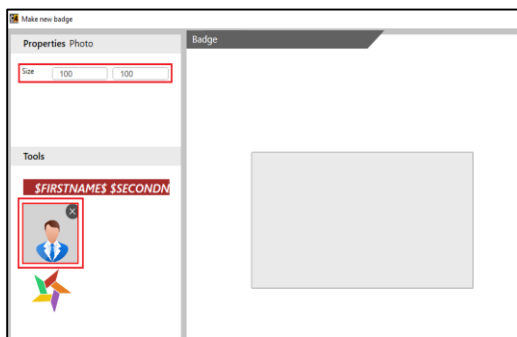


The **Personal Information** panel can be moved by clicking on it and dragging it onto a badge. To remove it from a badge, click on the **X** button.

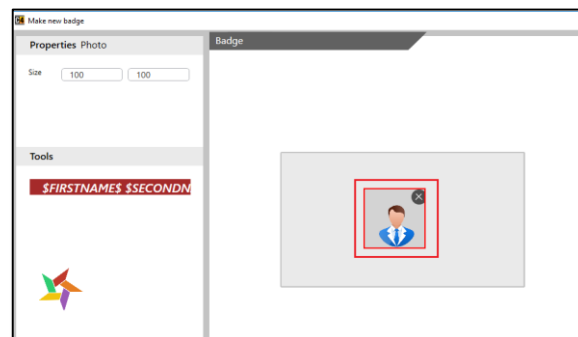
---

## Photo

**Photo** of a visitor.



Clicking on the **Photo** icon will enable you to modify photo **width** and **length**.

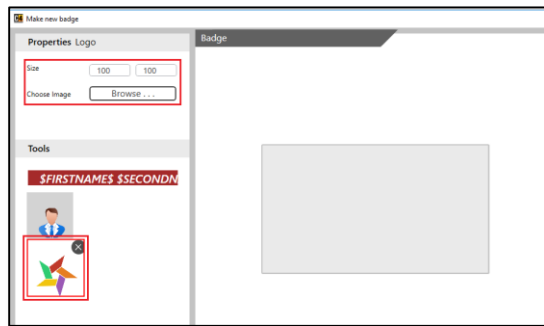


The **Photo** icon can be moved by clicking on it and dragging it onto a badge. To remove it from a badge, click on the **X** button.

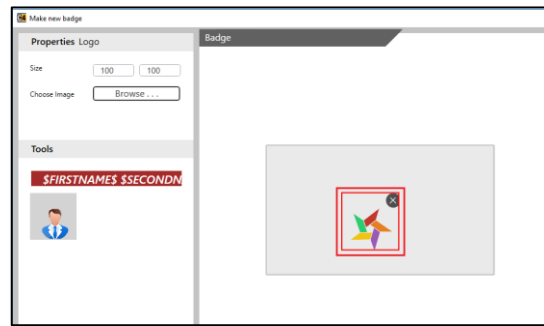
---

## Logo

### Logo of a host company

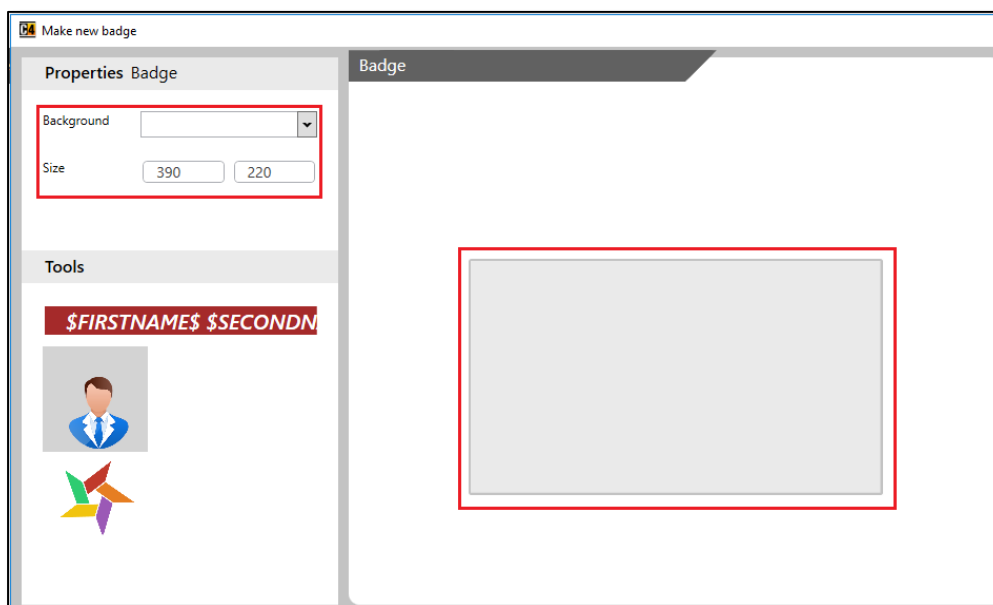


Clicking on the **Logo** icon will enable you to modify photo **width** and **length**, and choose a **company logo** from the database of stored icons.



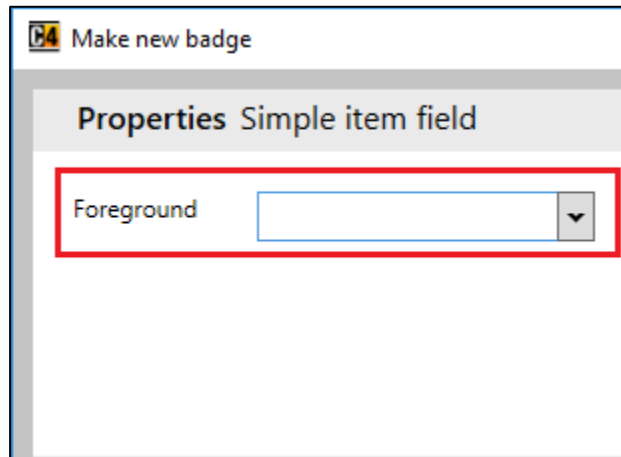
The **Photo** icon can be moved by clicking on it and dragging it onto a badge. To remove it from a badge, click on the **✕** button.

3. **Badge** – Is the editor area, where you can adjust your badge properties and place tools and fields on it.



A reception manager is able to set a **color** of the background and also **width** and **length** of a badge.

4. **Fields** – A reception manager is able to choose from various types of **Fields**, which they can add onto a badge. These **Fields** correspond with those, which are in the *Configuration Panel*.



The only **Property** which can be set is a color of the background.

**Next** – Clicking on the → **Next** button, will open the new pop-up window.

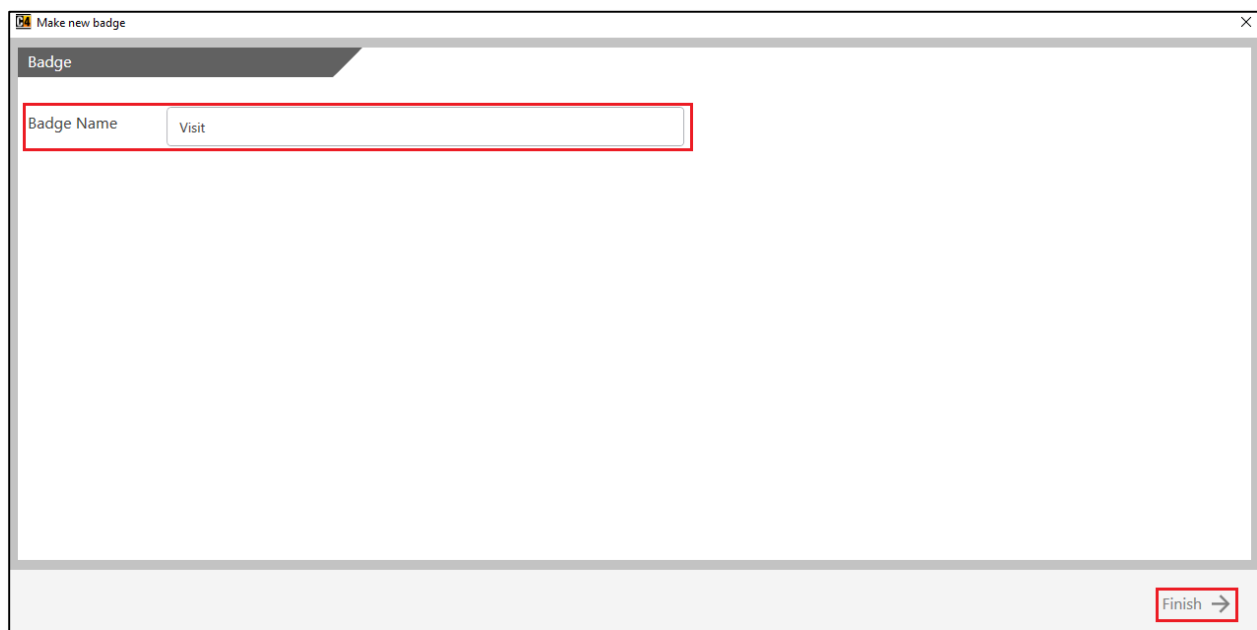



Figure 120 - Badge naming window

**Badge Name** field enables a reception manager to name a badge. To finish the process of badge creation, click on the → **Finish** button.

## 4.4.2. Modify Badge Template

A reception manager can modify a created badge template by clicking on a desired badge and then clicking the  **Modify** button. This will open the same wizard as during the badge creation.

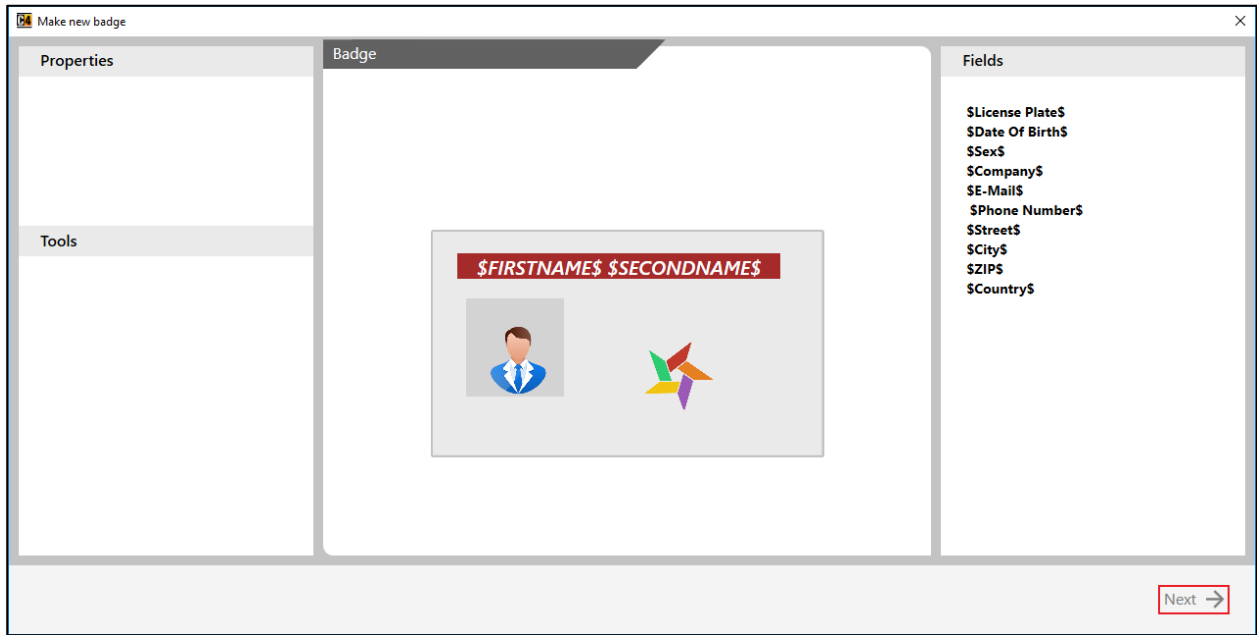



Figure 121 - Process of badge template modification

Clicking on the  **Next** button, will open the new pop-up window.

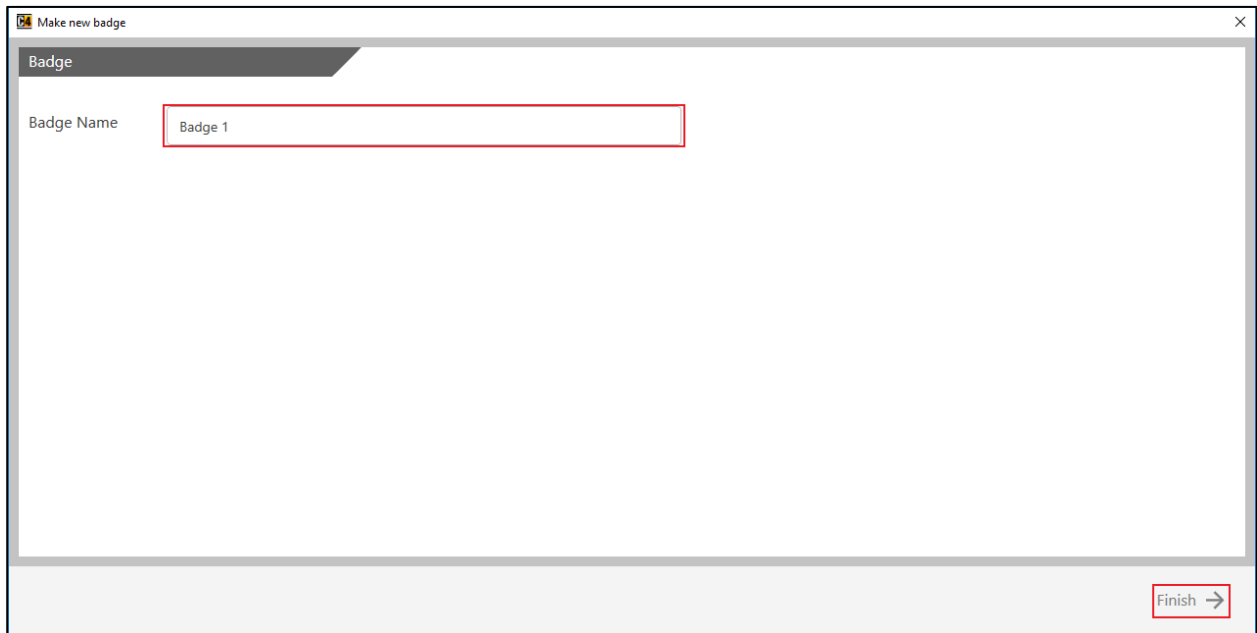


Figure 122 - Wizard for renaming of badge template

It is possible to either rename the badge template or finish the process of modification by clicking on the → **Finish** button in this wizard.

### 4.4.3. Remove Badge Template

A reception manager can remove a created badge template by clicking on the desired badge template and then clicking on the ✕ **Remove** button. This will remove the badge from the **Template Name** list.

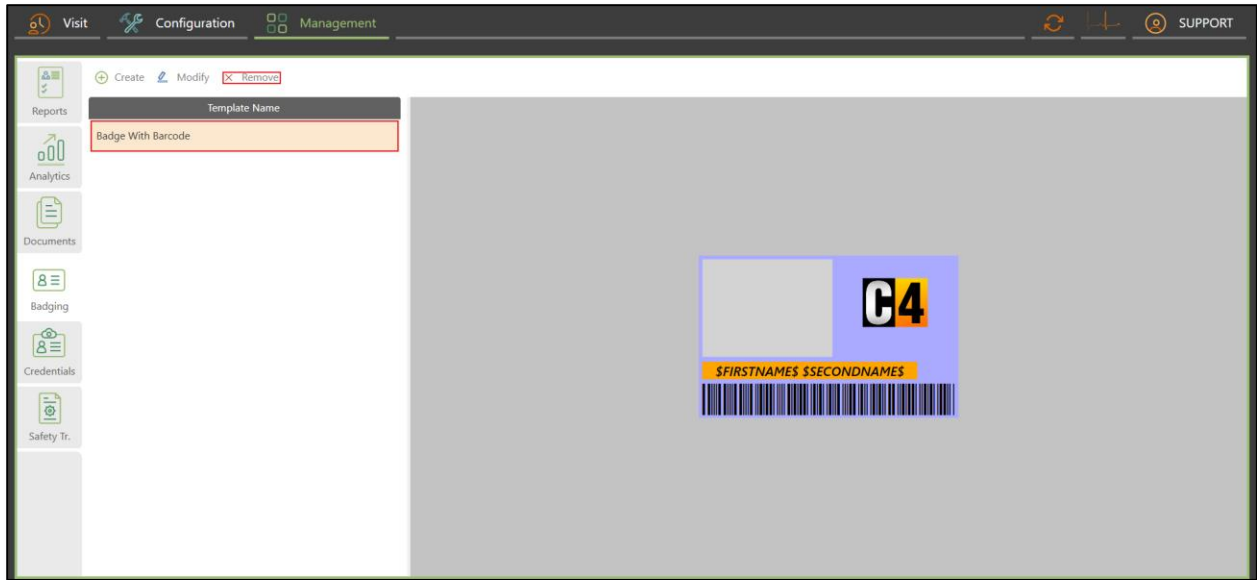


Figure 123 - Process of removing a badge template

### 4.4.4. Template Name and Badge Template Preview

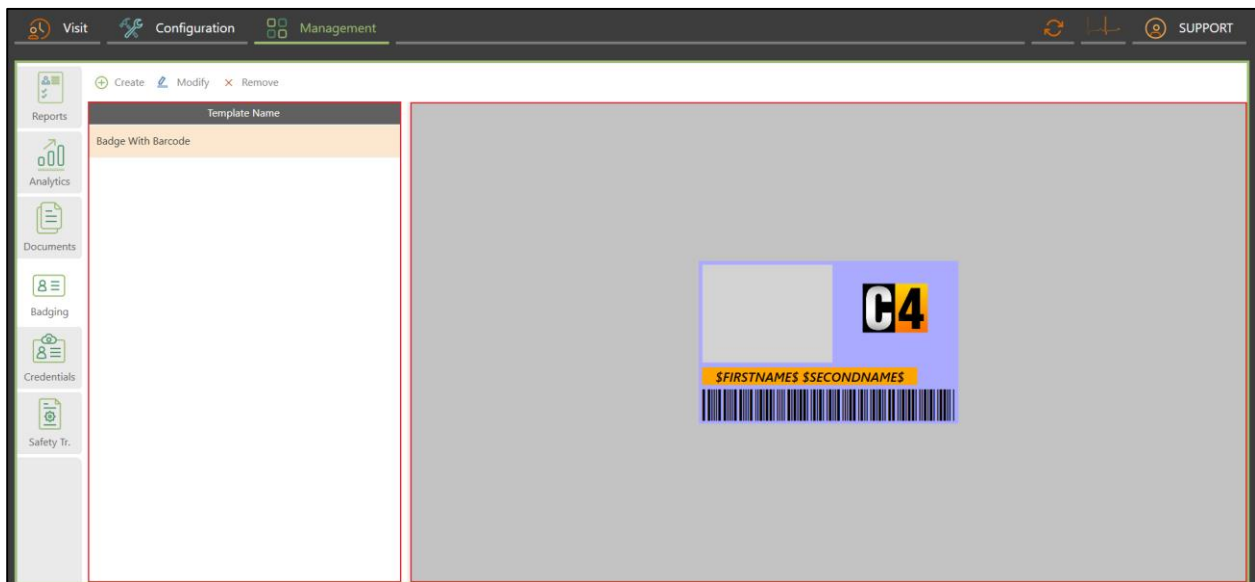


Figure 124 - Template Name and badge template preview

**Template Name** – The list of all created badge templates is available on the left side.

**Badge template preview** – After clicking on a certain badge template, the preview of the selected badge template will display on the right side.

## 4.5. Credentials

The *Credentials Tab* enables a reception manager to view the list of all available cards of a reception that is selected. It is possible to: **search cards, add cards, remove cards, generate cards, move cards, view cards** and **view card holder information**.

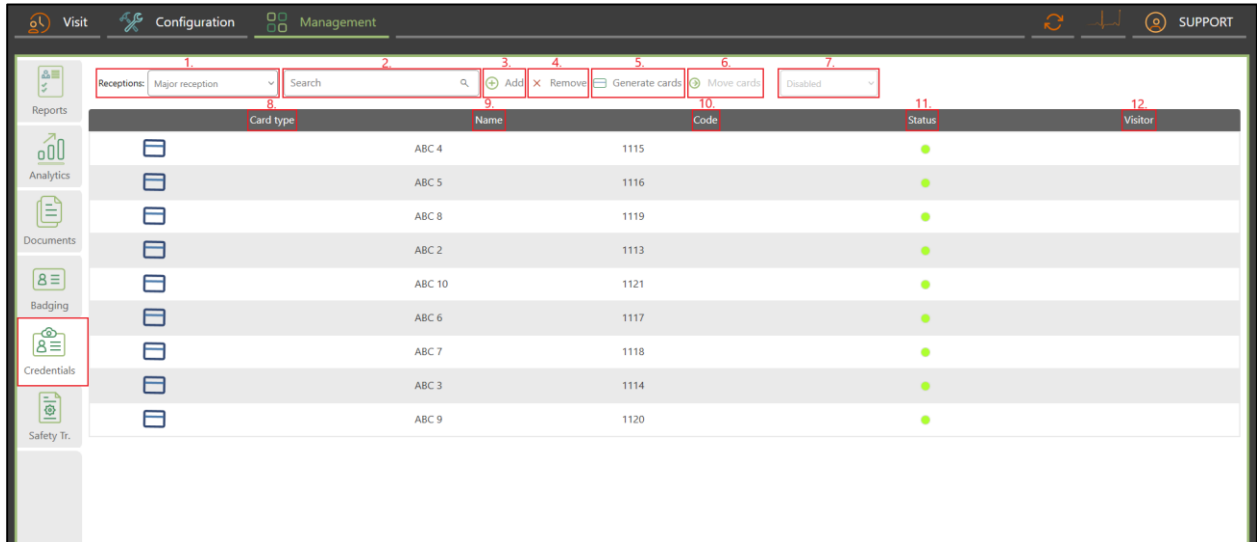


Figure 125 - Credentials Tab

1. **Receptions search bar:** Allows a reception manager to search through receptions.
2. **Search tab:** Allows a reception manager to search through cards.
3. **Add:** Button that opens wizard for assigning credentials for reception.
4. **Remove:** Button for unassigning credentials from reception.
5. **Generate Cards:** Button for generating cards.
6. **Move Cards:** Button for moving cards from reception to reception.
7. **Status of card:** This allows an administrator to set the status of a card. Available status options are:
  - Disabled** – The card cannot be used.
  - Enabled** – The card can be used.
  - Lost** – The card is temporary disabled until found.
8. **Card Type:** Column displays the selected card type.
9. **Name:** Column displays the selected card name.
10. **Code:** Column displays the selected card code.
11. **Status:** Column displays the current status of a certain card. There are three possible status colors:
  - Green:** The card is enabled.
  - Red:** The card is disabled.
  - Blue:** The card is lost.
12. **Visitor:** Column displays the name of card holder.

### 4.5.1. Assigning Cards To Reception

To assign cards to the selected reception, click on the **+** **Add** button. This will open a pop-up window, where a reception manager can choose from one or more already existing cards from C4 and allocate them to the selected reception.

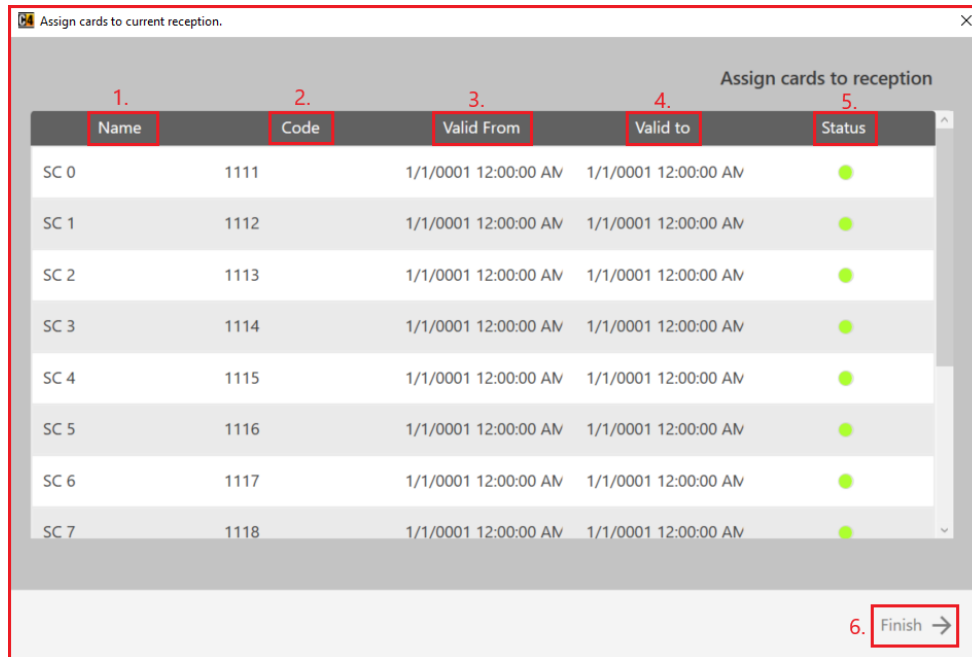


Figure 126 - Assigning Cards to Reception wizard

1. **Name:** Column displays the card name.
2. **Code:** Column displays the card code.
3. **Valid from:** Column indicates the start of validation period of a card.
4. **Valid to:** Column indicates the end of validation period of a card.
5. **Status:** Column displays the current status of a certain card. There are three possible status colors:

Status



**Green:** The card is enabled.

Status



**Red:** The card is disabled.

Status



**Blue:** The card is lost.

6. **Finish:** Clicking on the **→ Finish** button will complete the whole process.



### 4.5.2. Unassigning Credentials From Reception

To unassign credentials from a reception, click on the **Remove** button while a card is selected. It will remove the card from the list of cards allocated to the selected reception. It is possible to unassign more cards at once by multi selecting them.

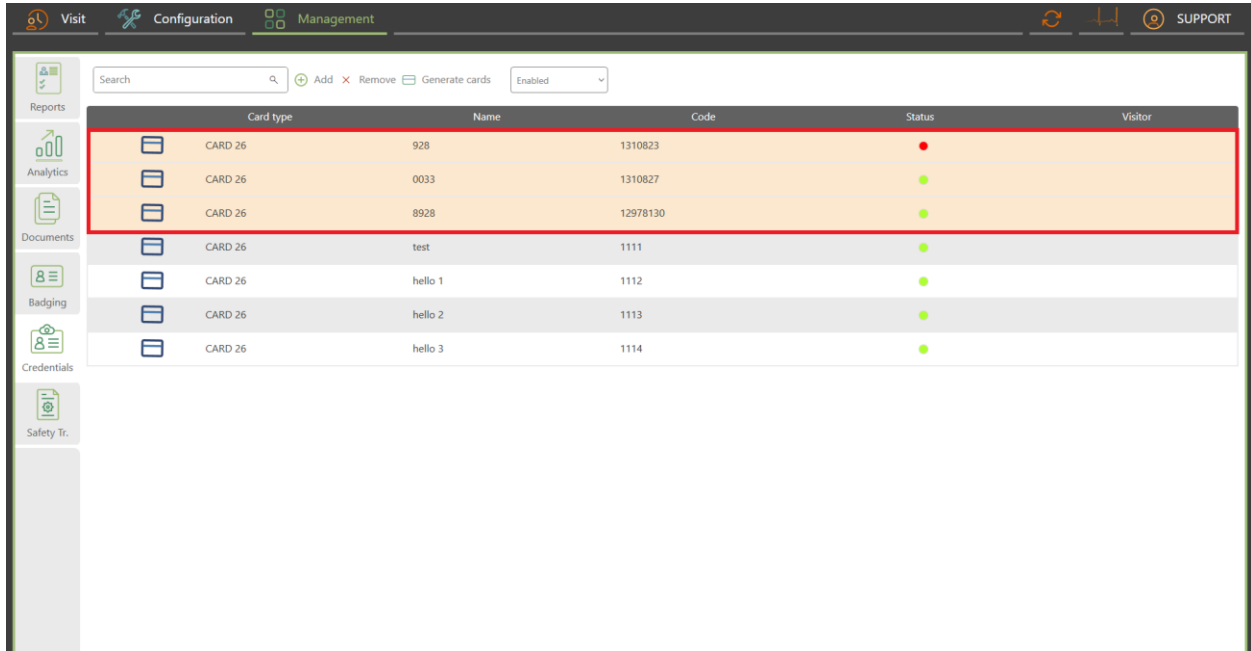


Figure 127 - Unassigning credentials from reception process

### 4.5.3. Generating New Cards

To generate a new card, click on the **Generate Cards** button, which will open a pop-up window, where a reception manager can choose the **amount of cards to be generated, card name and card type**.

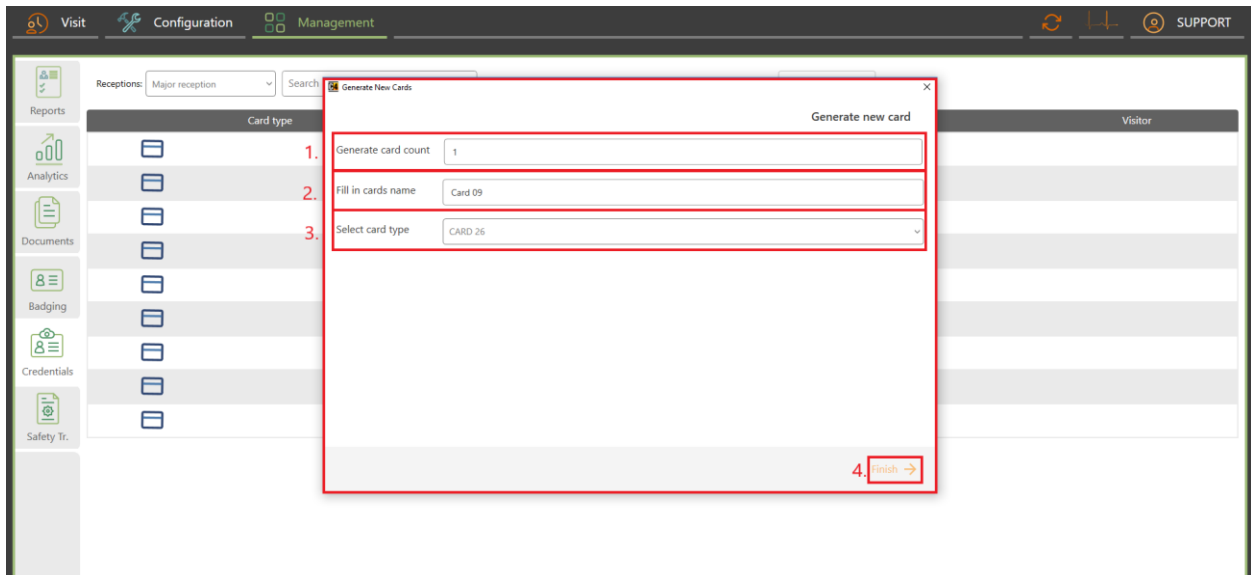


Figure 128 - Generating new cards pop-up window

1. **Generate Card Count:** Digit in this field indicates the number of cards which are going to be generated.
2. **Fill In Cards Name:** Field defines card name.
3. **Select Card Type:** Combo box enables an administrator to preview available card types and select one.
4. **Finish:** Clicking on the → **Finish** button will finish the process.

#### 4.5.4. Moving Cards

To move a card, click on the → **Move Cards** button, which will enable a reception manager to move allocated cards from one reception to another reception. This is done by selecting the card/s and then clicking on the → **Move Cards** button, which will open a pop-up window, where they can choose the destination reception.

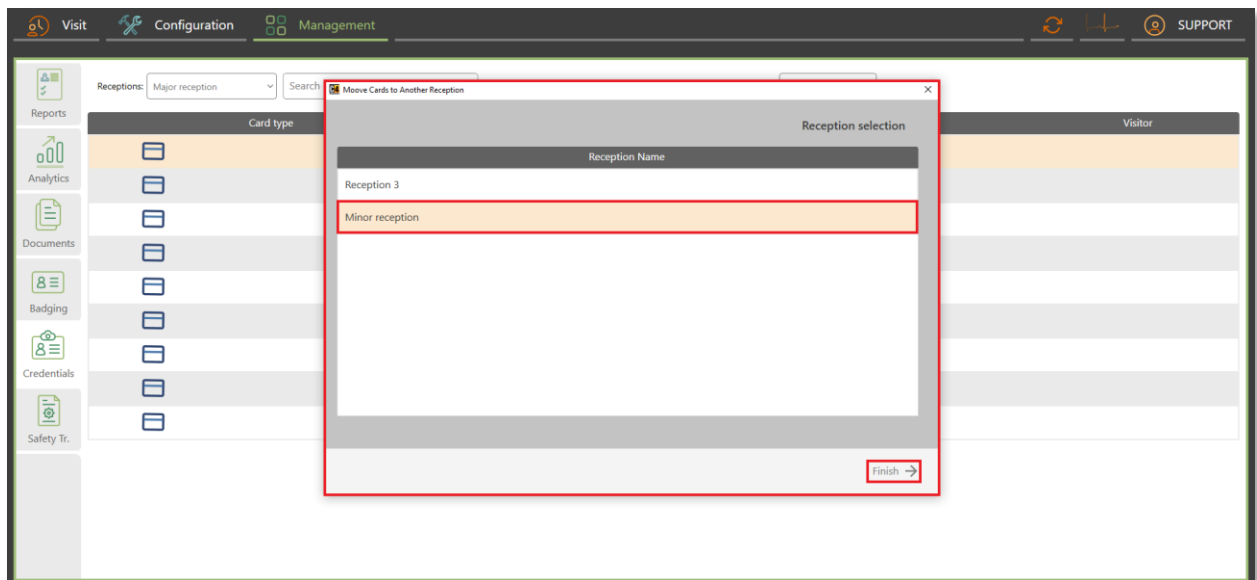


Figure 129 - Moving cards pop-up window

## 4.6. Safety Training

The *Safety Training Tab* enables a reception manager to grant and remove safety training approval to a visitor. If the **Safety Training** option is turned on for the given reception, it is necessary to grant visitors safety training approval in order to access the area they are entering through the reception.

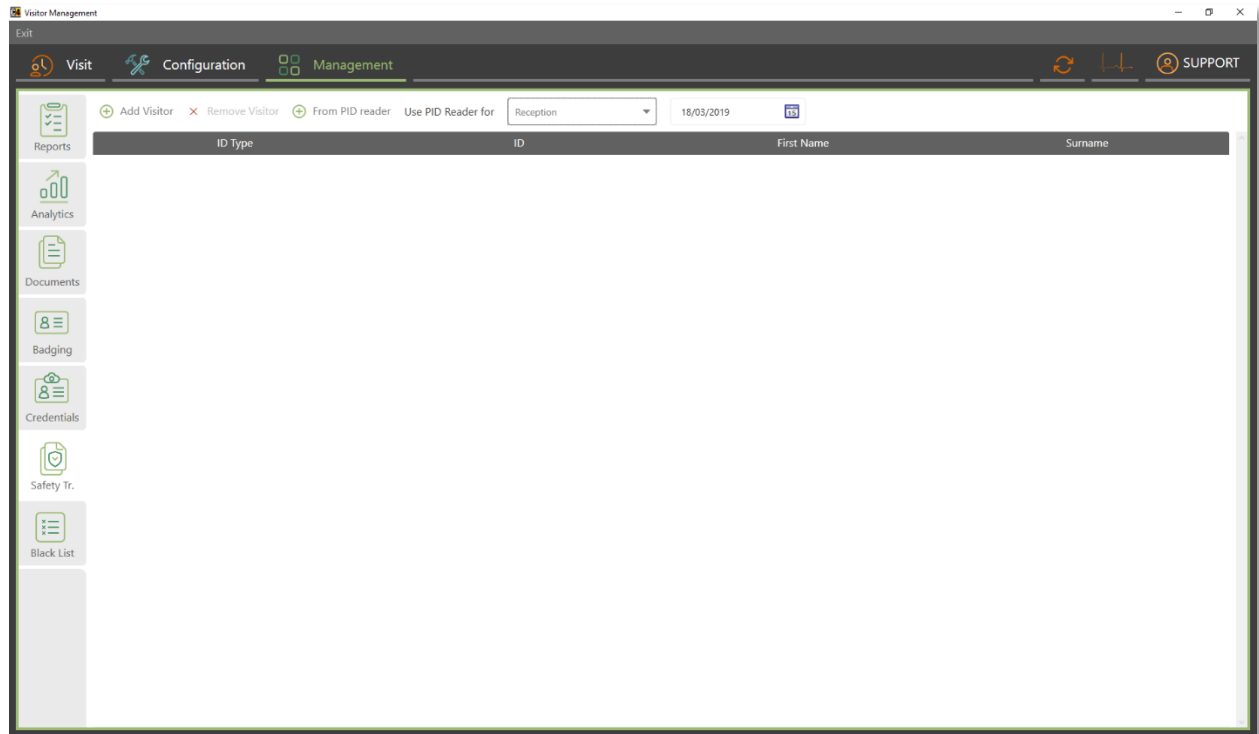


Figure 130 - Safety Training Tab

**Add Visitor** – Button for adding safety approval to a visitor.

**Remove Visitor** – Button for removing a visitor’s safety training approval.

**History search** – Calendar which allows historical search of safety trainings granted on a selected day.

**Records List** – The Records List provides a list of all visitors that have been granted safety training approval on a selected date.

## 4.6.1. Granting Safety Training

To grant safety training, click on the **+ Add Visitor** button.

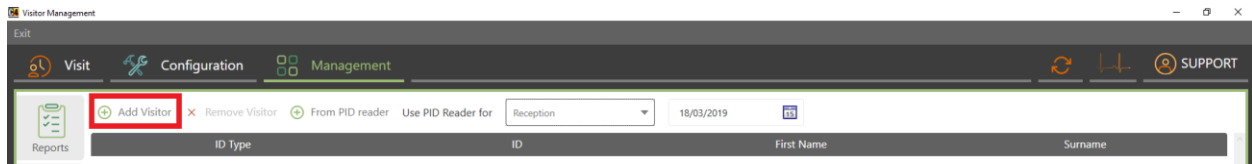


Figure 131 - Add visitor for safety training

Safety training can be granted to an existing visitor or a new one.

### Granting safety training to an existing visitor

Select the **ID Type** of a visitor. Visitor called John Kaspersky identified himself at the reception with his Passport, which has the ID number 1234.

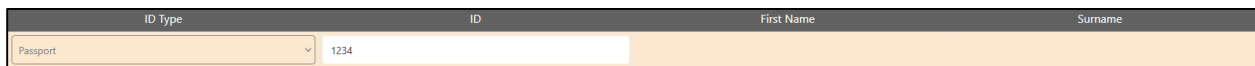


Figure 132 - Selection of ID Type and ID number

After filling the **ID Type** combo box and **ID field**, and then pressing the **Enter** key, the corresponding person's details will be automatically filled in.



Figure 133 - Name will appear after clicking on the screen or hitting button Enter

This change can be seen in the *Details Panel* of *Visit Panel*. The **Safety Tr.** is marked as **True**, which means, that the visitor has been granted safety training approval.

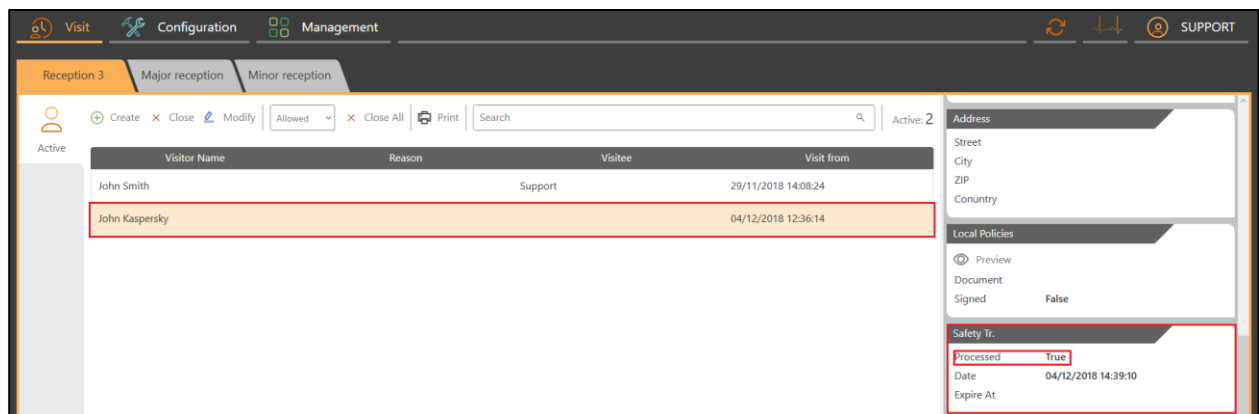


Figure 134 - Status of safety training in Visit Panel

## Granting safety training to new visitor

In case the visitor has not yet been registered at the reception, it is also possible to grant them safety training. The entered information will be saved and will create the visitor in the system.

Select the **ID Type** of a visitor, enter their ID and Name.



Figure 135 - Granting safety training for new visitor

**Example:** Visitor Eduard Green arrives at a reception and is directly sent for a safety training. The trainer or reception manager provides him with safety training approval in the Management Panel, Safety Tr. Tab. By providing him with safety training, all that has to be done upon arrival is to search his name or entered ID in the Visit Panel during visit creation.

## Granting safety training by PID reader

If the reception has a PID reader configured for creating visits, the PID reader can also be used for importing data to the *Safety Training Panel*. Simply select the reception for which safety training should be generated as seen in the image below:

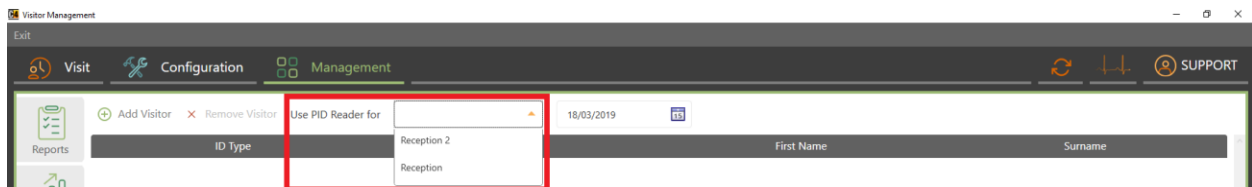
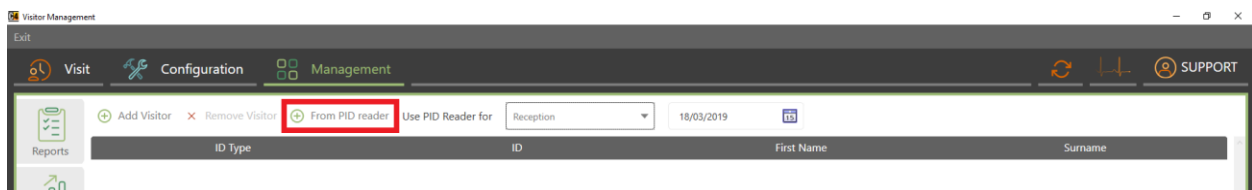


Figure 136 - Selecting reception for safety training PID reader

Once the reception is selected, click the **From PID reader** button and simply swipe or scan the card through the PID reader and the visitor's data will be automatically added.



## 4.6.2. Removing Safety Training

To remove the granted safety training, select the field of a desired visitor, and then press the **✗ Remove Visitor** button, which will erase a field from the record list.

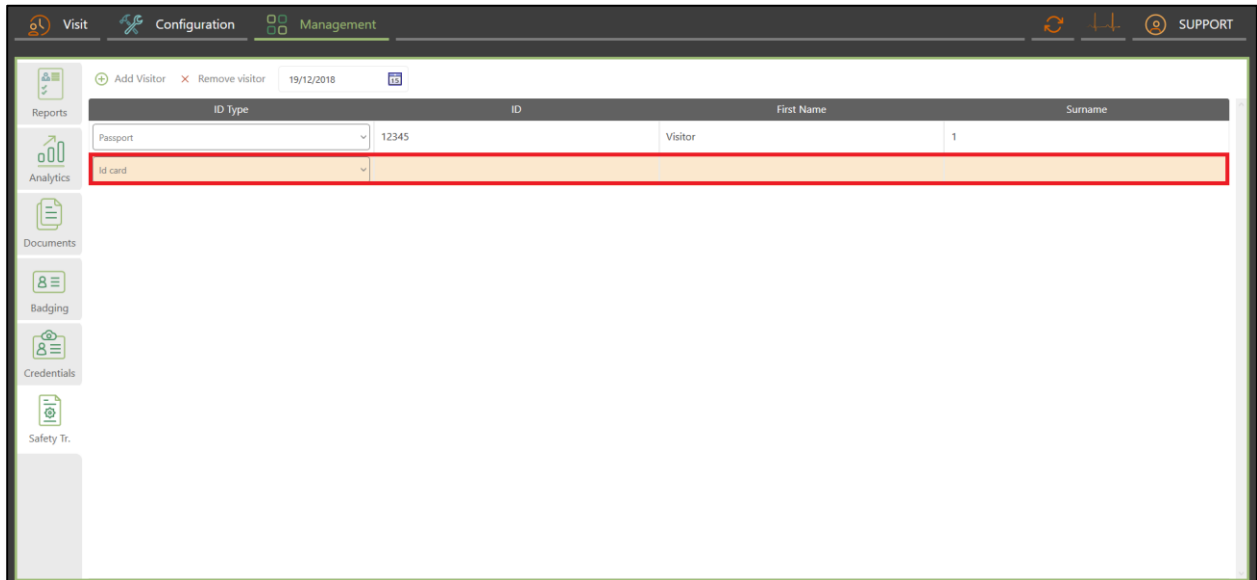



Figure 137 - Selecting and removing a created visitor

### 4.6.3. History Search

*History Search Tab* enables a reception manager to browse through the history of granted safety trainings. Selection of a certain date will display in the record list all safety trainings granted in that day. There are two ways of selecting the date value:

**Selecting a date with icon:** By clicking on the  icon, a reception manager can select a specific date from the calendar.

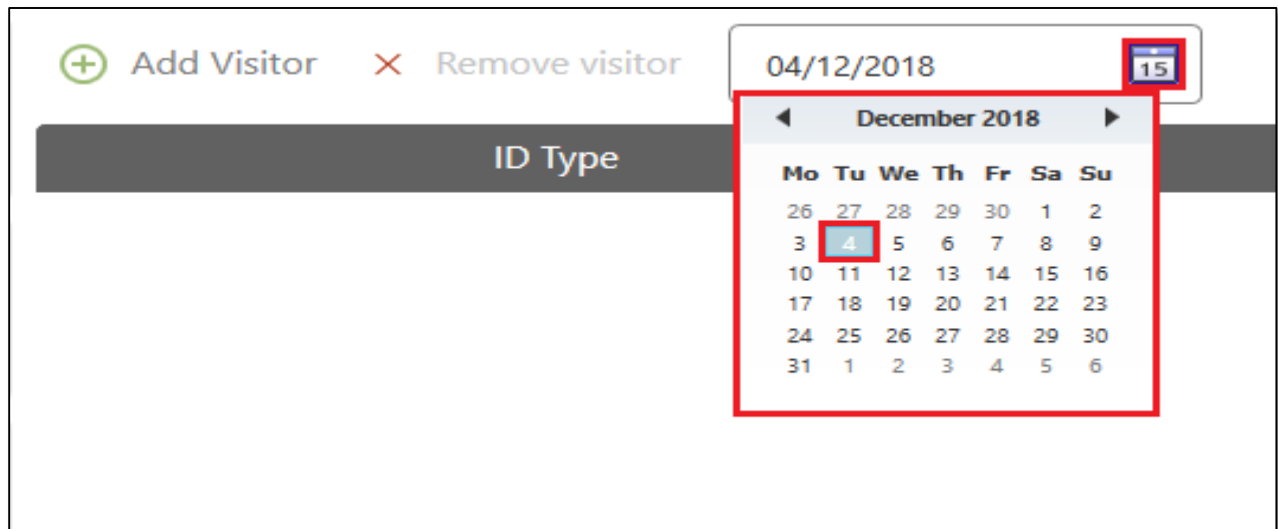


Figure 138 - Selection of specific date from the calendar

**Selecting a date by typing:** A reception manager can directly type the desired date into the field.

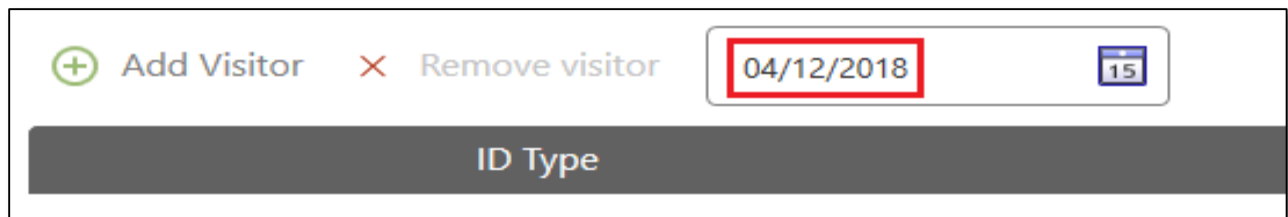


Figure 139 - Typing desired date into the field

## 4.7. Blacklist

The reception manager can manage the visitor blacklist through the *Blacklist Panel*. The scope of functions included is filtering through the blacklist, adding visitors to the blacklist, removing them from the blacklist, and modifying their blacklist level.

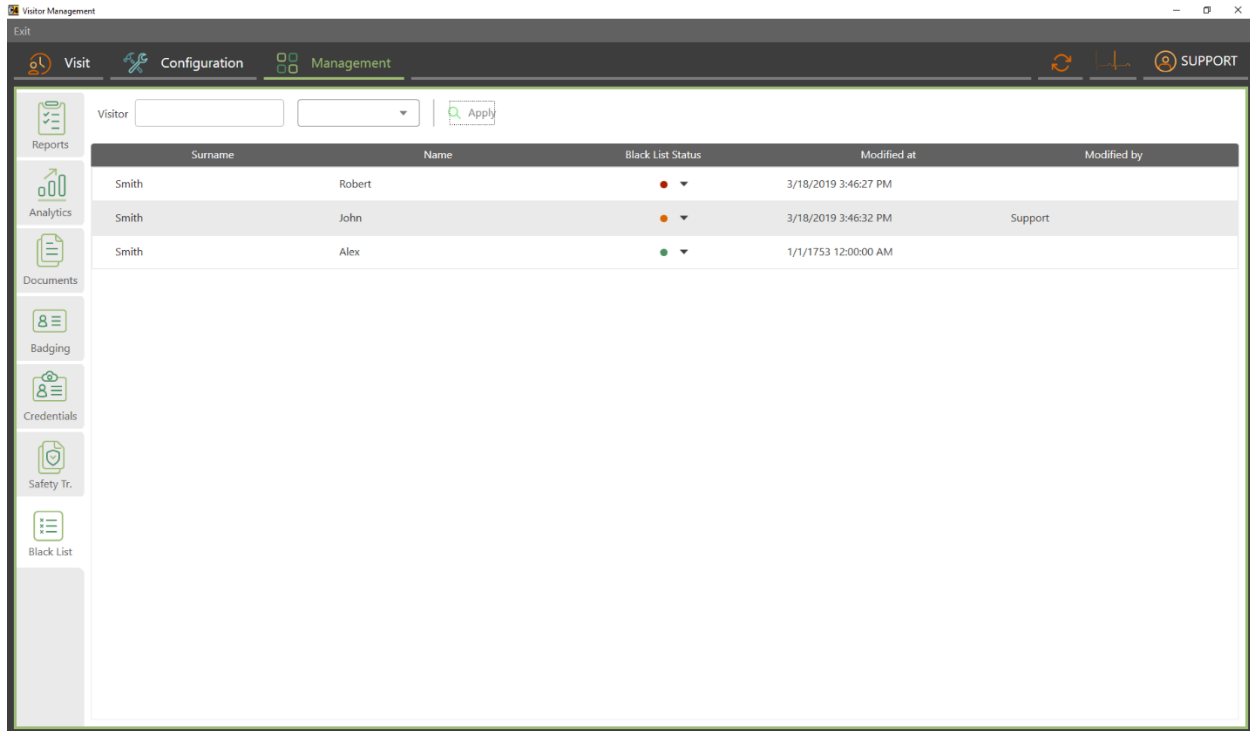


Figure 140 - Blacklist Panel

The *Records List* of the *Blacklist Panel* contains information about the visitor and their blacklist status. The visitors' blacklist states are represented by three colored circles:

**Red – Blocked**

**Orange – Warning**

**Green – Allowed**

The *Records List* of visitors in this section can be sorted by clicking on one of the column titles. Clicking again changes between either ascending or descending order.



### 4.7.1. Filtering the Blacklist

It is possible to filter the blacklist using the search bar and filtering results by visitor name. Click the **Apply** button to filter the results.

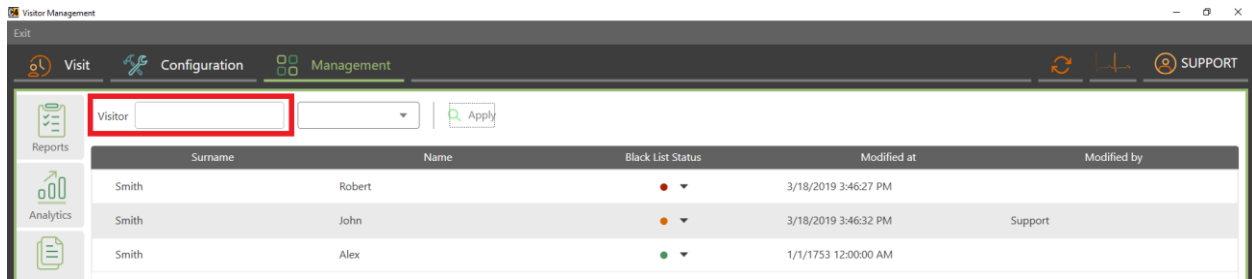


Figure 141 - Filtering blacklist by visitor name

It is also possible to filter by the blacklist level by clicking on the combo box next to the search box, which unravels the three possible blacklist levels for filtering. Select one or multiple checkboxes to filter the **Records List** result. Click the **Apply** button to filter the results.

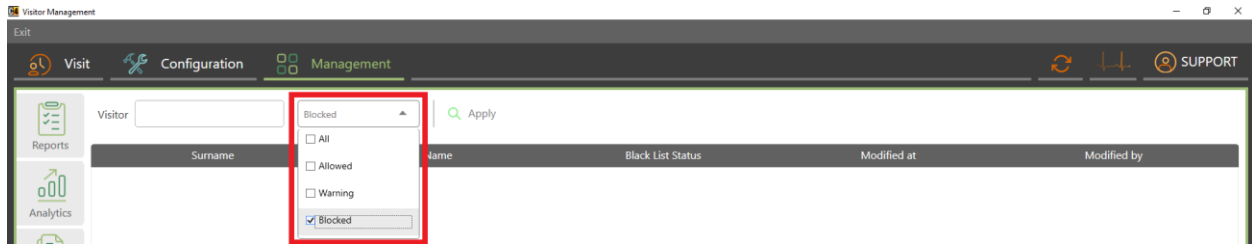


Figure 142 - Filtering blacklist by blacklist level

### 4.7.2. Modifying the Blacklist

The **Blacklist Panel** allows a reception manager to modify the blacklist level of a given visitor by clicking on the corresponding colored circle which represents the visitor's blacklist level. This unravels a combo box with the available blacklist levels. Select one to modify the visitor's blacklist level.

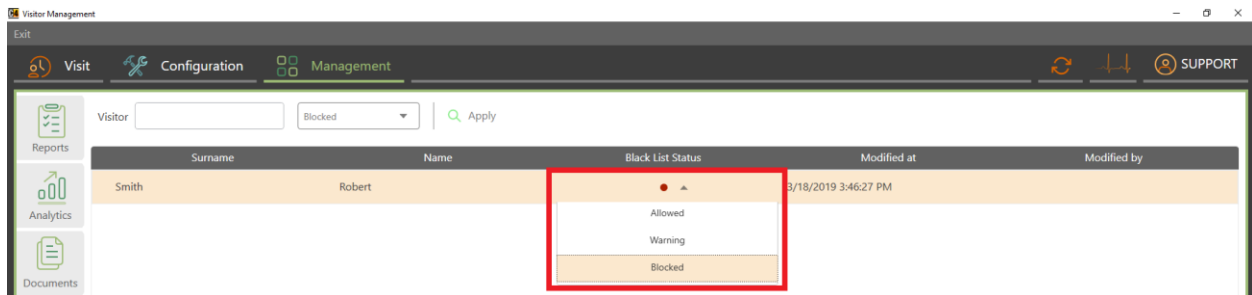


Figure 143 - Modifying visitor's blacklist level