Visitor Module Concepts and Planning

1. Creation of a reception

The *Visitor Module* allows the creation of a single reception setup or the use of multiple receptions. In case a user requests the use of a single reception, please refer to **Section 3.2** of the Visitor Module User Guide for setting up the reception.

In case multiple receptions are required for an installation, please first refer to **Section 3.1** of the Visitor Module User Guide for information on creating and modifying receptions.

2. Adding Cards to Reception

Cards can be assigned to receptions allowing them to provide visitors with access to specified corridors (access levels) within the building(s). The Administrator can import cards from the C4 and assign them to receptions as necessary. The Reception Manager and Administrator are both able to generate cards.

2.1. Adding cards from C4

Cards first have to be added via C4 and subsequently they can be assigned to receptions within the Visitor Module by the administrator. This is explained in **Section 3.3.1.** of the Visitor Module User Guide.

2.2. Generating Cards

It is also possible to generate multiple consecutive cards through the *Generate New Cards wizard*, this is explained in sections **3.3.3** and **4.5.3** of the Visitor Module User Guide.

3. Defining Access permissions for the reception

The Administrator is responsible for creating corridors (access levels) consisting of access points (e.g. doors).

The Receptionist then provides a visitor with access to selected corridors during the creation of a visit.

This is done in the *Configuration* panel of the *Visitor Module*, please refer to **Section 3.4** of the Visitor Module User Guide for information on how to set up corridors for use by the Receptionist.

4. Complete Visit Process (including preregistering visit)

The first step for managing visits is for the Administrator to configure the given reception, setting which fields should be displayed for filling in, along with other settings, such as the option of scheduling visits or preuploading PIN credentials to devices for scheduled visits. The configuration options are explained in **Section 3.2** of the Visitor Module User Guide.

The *Visitor Module* provides the option of scheduling visits beforehand, where the Receptionist can fill in known information about the visitor and visit.

To create a scheduled visit for the visitor, the Receptionist carries out the steps as described in **Section 2.2.1** of the Visitor Module User Guide. Once this scheduled visit is created, the Receptionist must activate the visit upon arrival of the visitor. This step is explained in **Section 2.2.2** of the Visitor Module

User Guide. The Receptionist fills in any extra information and can provide them with an access card or PIN credentials to selected corridors.

Once the visit is finished, the visitor either checks out at the reception and the Receptionist manually closes the visit, deactivating their credentials in the process (see **Section 2.1.2**), or the administrator can set up visits to be closed by a card collector that reads the visitor's card and automatically closes the visit and deactivates their credentials (see **Section 3.2.12**).

5. Visit with registration at the reception

The first step for managing visits is for the Administrator to configure the given reception, setting which fields should be displayed for filling in, along with other settings, such as the option of scheduling visits or preuploading PIN credentials to devices for scheduled visits. The configuration options are explained in **Section 3.2** of the Visitor Module User Guide.

In case the visitor arrives at the reception and is not on a list of scheduled visits, the Receptionist simply creates a new visit (see **Section 2.1.1**) and during the process of filling in information, they can assign the visitor a card with access to selected corridors.

Once the visit is finished, the visitor either checks out at the reception and the Receptionist manually closes the visit, deactivating their credentials in the process (see **Section 2.1.2**), or the administrator can set up visits to be closed by a card collector that reads the visitor's card and automatically closes the visit and deactivates their credentials (see **Section 3.2.12**).

5.1.   Visit registration with PID reader

It is possible to use a PID reader at the reception. In case the reception uses a PID reader, the Administrator selects the checkbox for PID Reader and chooses which device is to be used. During the creation of a visit, the first page of the wizard will request the receptionist to swipe (or scan, depending on device used) the visitor's PID. This will then automatically import their information to the wizard.

6. Visit without an access card – (printed badges)

In the case that the reception does not provide access cards to the visitor, the Receptionist can print unique badges for the visitor, which act as a pass. These badges are created as templates by the Reception Manager, who defines what information should be displayed on the badge (see **Section 4.4.1**). The information is then dynamically loaded onto the badge during the creation of a visit and can be printed.

The Receptionist either activates a scheduled visit or creates a new visit and if badges are set up (see **Section 3.2.8**), they can be printed during the process of activating or creating a visit. The Receptionist calls for the host to come pick up their visitor.

Once the visit is finished, the visitor checks out at the reception and the Receptionist manually closes the visit.

7. Receptions that require safety training

In case the reception provides access to an area requiring safety training, the reception must be configured by the Administrator to require safety training (see **Section 3.2**). This can be a mine or factory, where there are safety guidelines that a visitor must be taught.

Example:

A visitor arrives at the reception of a fuel processing factory that has certain safety guidelines and each visitor must undergo safety training to enter the factory. If the person has already undergone safety training, they can be found by searching for existing visitors when creating a new visit. If the visitor can not be found in the list of existing visitors, it means that it is his first time at the factory and he has not undergone safety training. The receptionist will send this visitor to a person responsible for safety training.

Once the visitor completes safety training, the Reception Manager can enter the person to a list of visitors that have undergone safety training (see **Section 4.6.1**). It is necessary to enter an ID of the visitor to pair the safety training to a specific person (to prevent mistakes in system – e.g. 2 visitors named John Smith have entered the facility but only one has undergone safety training).

The visitor then returns to the reception, and the receptionist can now create a visit. Once this visit is created, the person can enter the facility.

8. Visits with pre-loaded cards (no incremental upload on device)

In case the corridors/access levels you are providing access to do not have the option to incrementally upload credentials to the device, the Visitor Module can be configured to work with these types of devices by selecting the Preloaded Mode checkbox (see **Section 3.2.9**).

Preloaded mode simplifies the process of providing card credentials to visitors, by simply having a set amount of cards that have been preloaded to the system and have equal access (access is provided to all corridors set up for the reception).

9. Unclosed visits and credential blocking

In case there is no card collector device for the reception (only manually checking out and giving back card at reception), it is possible to set up a time of day when all visits should be automatically closed and in case someone forgets to return their card, the card's access will be disabled.

This feature makes sure visitors or someone who has found the card can not misuse it. This option can be configured by the Administrator (see **Section 3.2.13**)

10. Automatically closing visits after scheduled end

In case a visit has not been closed by either the receptionist or card collector, the reception can be configured to close visits a certain time after the scheduled end of a visit (See **Section 3.2.12**). However,

this is only possible if the visit was created as a scheduled visit and the scheduled end time had been filled in.

11. Automatically closing visits, a certain time after activation

It is possible to set up a reception to automatically close a certain time after visit activation/visit creation. In case visitors are expected to stay in the building for some maximum period of time (e.g. 2 hours' maximum), the Administrator can set up the reception to automatically close visits 2 hours after their activation/creation (See **Section 3.2.12**).

12. Moving cards between receptions

In case there are not enough cards at a given reception and some are moved to a different reception, the Reception Manager or Administrator can select cards and move them to a different reception (see **Section 3.3.4** for Administrator instructions or **Section 4.5.4** for Reception Manager instructions).

13. Adding a person to blacklist

The Visitor Module contains three levels of blacklist – *allowed, warning, blocked*. The *allowed* state means that a person is not blacklisted. The *warning* state 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. The *Blocked* state means they are blocked from entering the building. The steps for a receptionist blacklisting a visitor are explained in **Section 2.1.5.** of the Visitor Module User Guide, while steps for the reception manager blacklisting a visitor or modifying blacklist information are found in **Section 4.7.** of the Visitor Module User Guide.

The Blacklist functionality can be enabled for use by the Receptionist or the Reception Manager. The Administrator enables this functionality (see **Section 3.2.3**).

14. A blacklisted visitor enters the reception

In case a person that is blacklisted in the Visitor Module visits the reception, the receptionist will receive information that the person is blacklisted after filling in their basic personal information when creating a visit. At that point, the receptionist can contact the reception manager or take other measures to deny the person access to the building.

15. Printing reports

The Reception Manager has the ability to filter and print visit reports (see **Section 4.1.1.**) according to the information about visits that they require.

16.   Same visitor at two receptions simultaneously

In case an area/building is set up in such a manner, that a visitor may check in at two receptions, the Administrator should set up the visitor module to allow for visitor presence to be allowed at both receptions simultaneously (see **Section 3.2.16** for information on this setting).

With this setting, a visitor can have an active visit at two receptions simultaneously, and in case their visit is closed at one reception (the credentials given at that reception are also deactivated), but their visit stays active at the other reception (along with any credentials assigned).

17.   Visitor presence not allowed at multiple receptions

   simultaneously

In case the area/building is set up in such a manner, that there are multiple receptions they may pass through, but they do not wish for the visit of a visitor to be active at multiple receptions simultaneously, the Administrator should set up the visitor module to not allow visitor presence at multiple receptions simultaneously (see **Section 3.2.16** for information on this setting).

With this setting, the visitor can not have an active visit at multiple receptions, so in case they arrive at another reception and a visit is created for them, their active visit at the previous reception is automatically closed (the credentials given at that reception are also deactivated).

18.   Reception nested in another reception

In case the are/building is set up in such a manner, that the visitor must pass through multiple receptions (e.g. a reception at the main entrance of a building, then a company reception and finally a department reception), the Administrator should set up the visitor module for this situation with the "Reception nested in another reception" setting in the configuration panel (see **Section 3.2.16** for more information on this setting).

With this setting, the visitor can have their visit active at multiple receptions, however it differs from scenario 16 above. For example, if the visitor enters through receptions A, B and C subsequently, they will have 3 active visits at three different receptions. However, if the visitor leaves and checks out at reception B, all visits created after their visit was created at reception B will be closed, along with the visit at reception B – **Visits at reception B and C will be closed (and credentials given at these receptions will be deactivated).** Effectively, this locks out the visitor from any area he has left, but allows them to go outwards of the building/area, so they can still move through the corridors defined by reception A with their credential, until they check out or their visit is manually closed.