

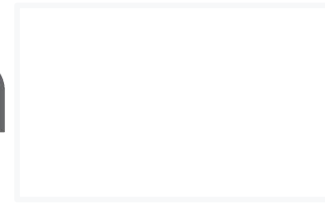
SmartSpace

Visitor Management User Guide



Introduction

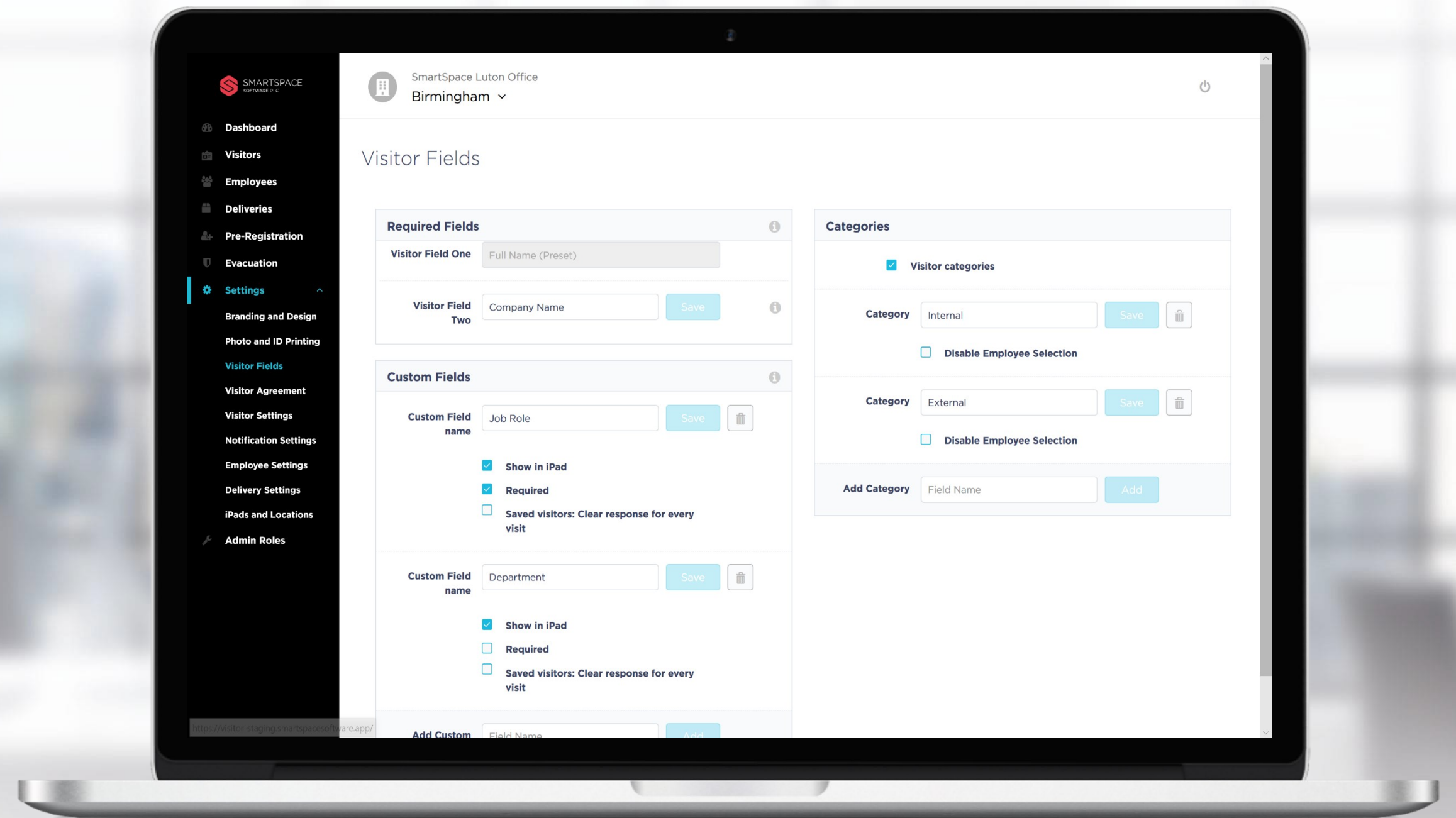
Getting started with

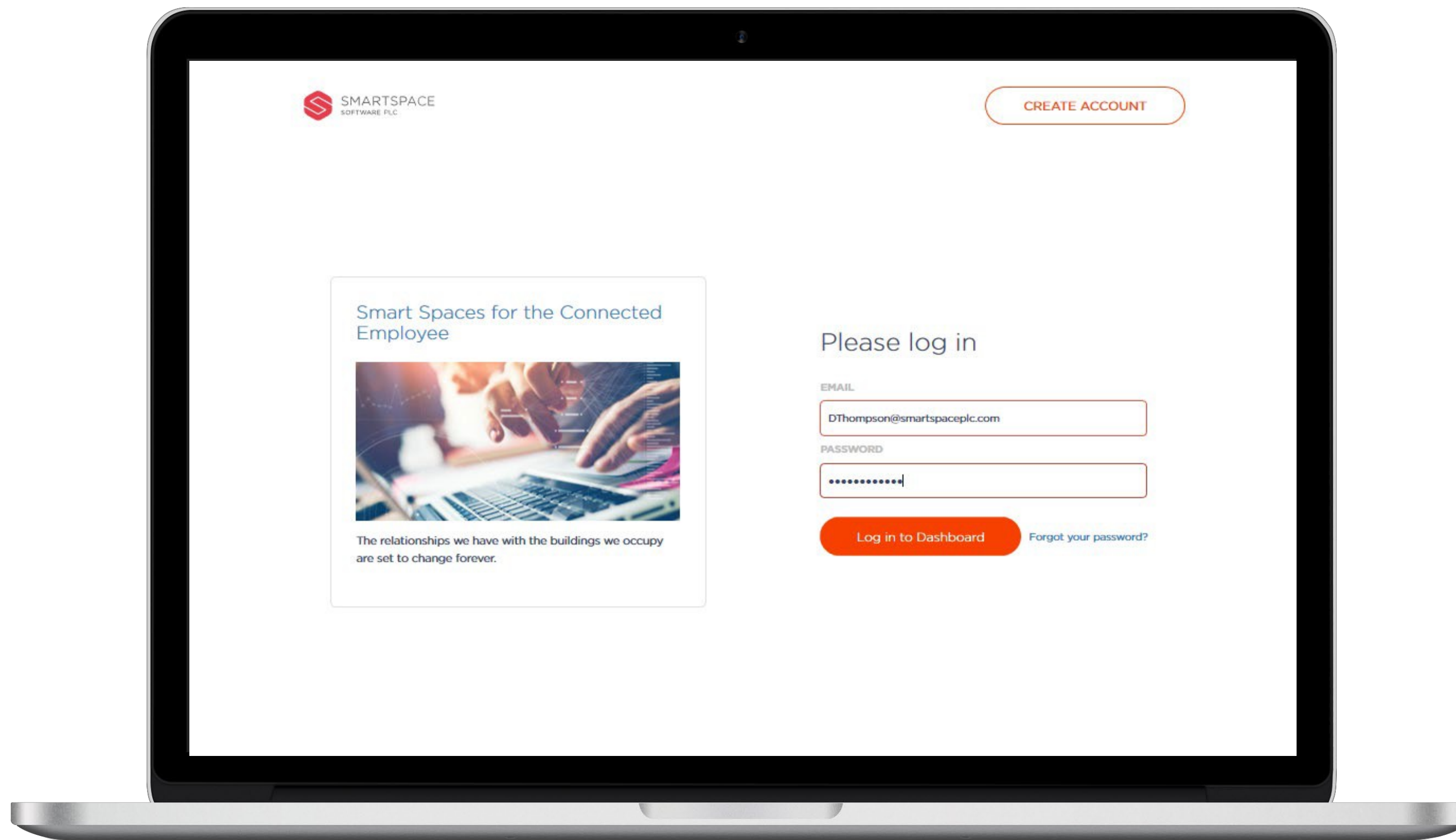


SmartSpace Visitor Management

This User Guide will outline the steps to adjust your settings and use the day to day admin features within the web dashboard. It also provides guidance on the iPad interface for visitors and employees.

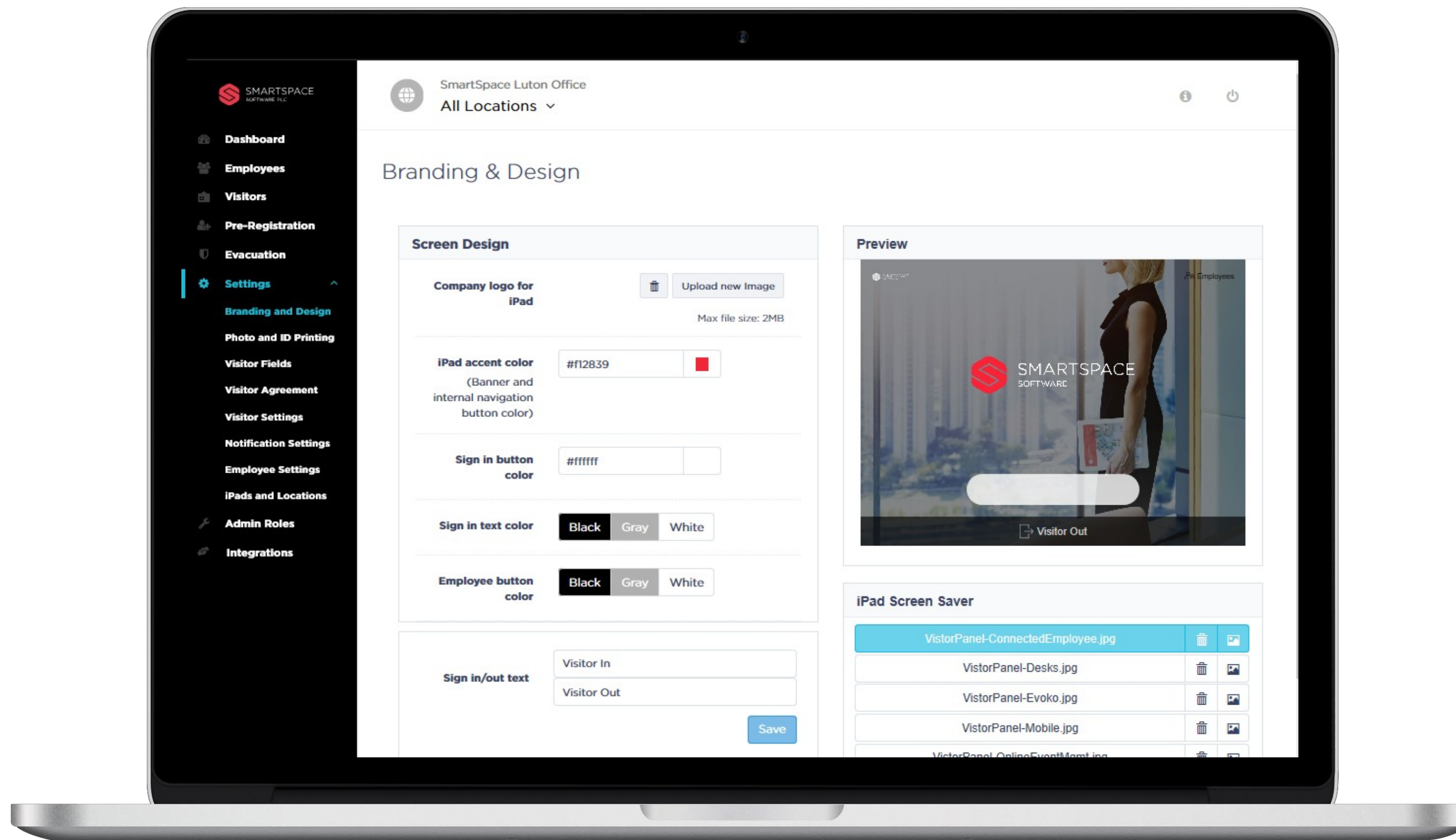
Web Dashboard Settings





Logging In

Log into the system using the username and password details provided by your system administrator.



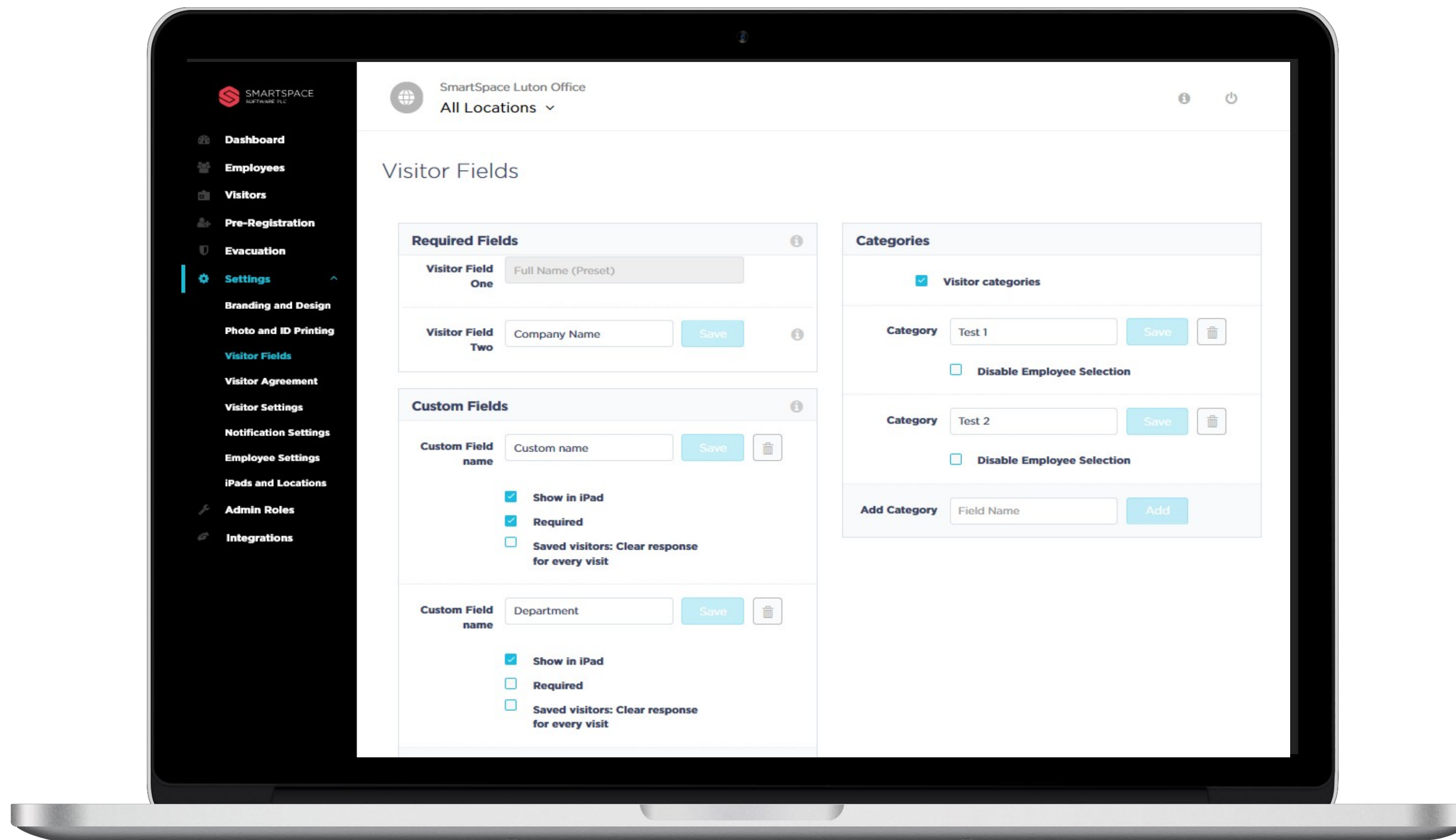
Branding & Design

Select Branding and Design to upload a company logo and specify the design colours for the visitor interface.

When uploading a company logo to the Screen Design section, ensure it has a transparent background.

You can select up to 10 different screensaver images that will rotate as background images.

The preview section allows you to see the effects of the selection you make to the design.



Visitor Fields

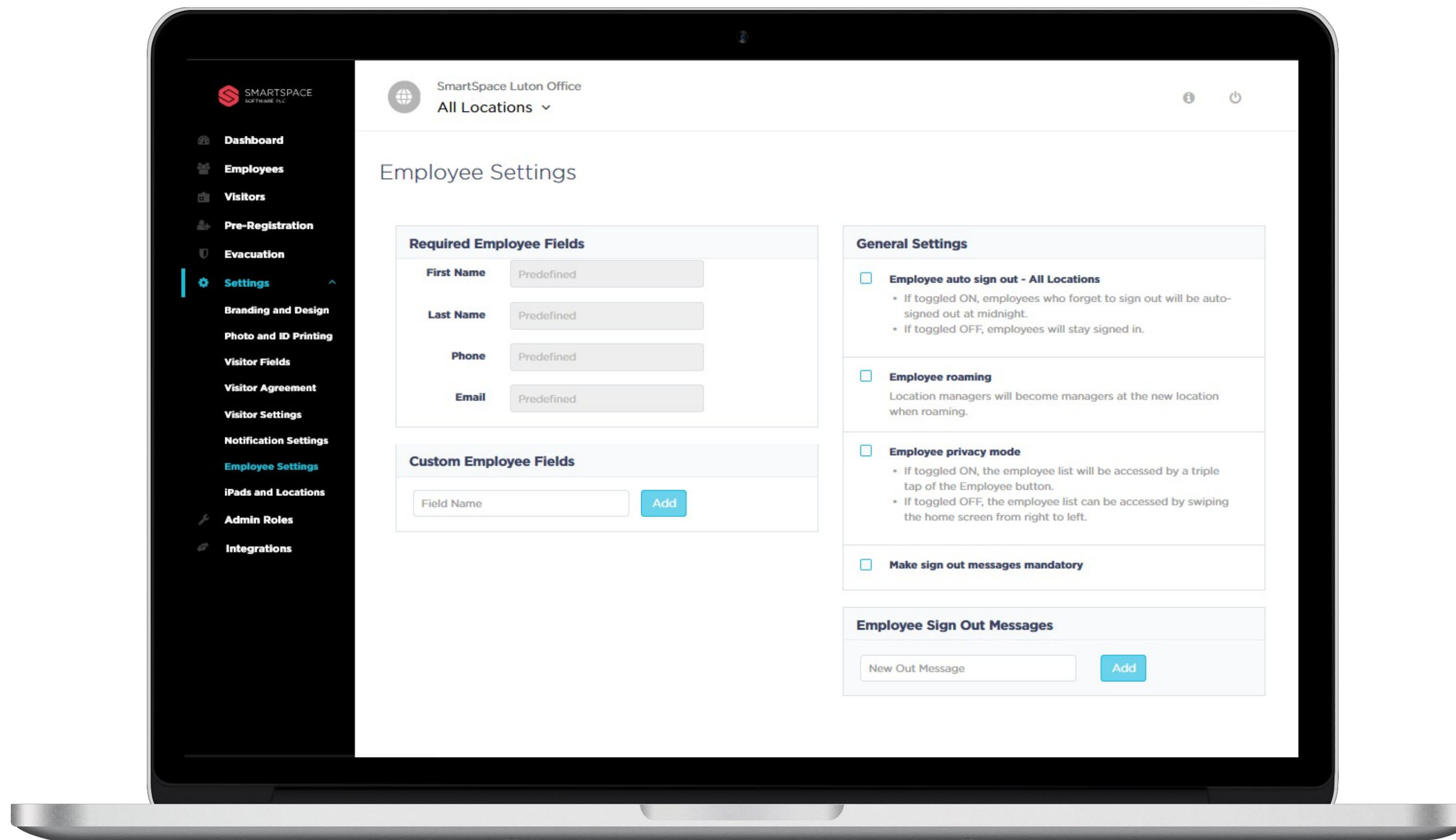
Visitor fields will capture the information you need from your visitor when they sign in on the iPad.

Required Visitor Fields create fields that must be completed before a visitor can continue with their sign in.

Visitor Field One is pre-set for you and Visitor Field Two is editable.

You can add your own custom fields and decide if you want to make them visible on the iPad or make them required fields.

You can also add categories to distinguish between different types of visitor.



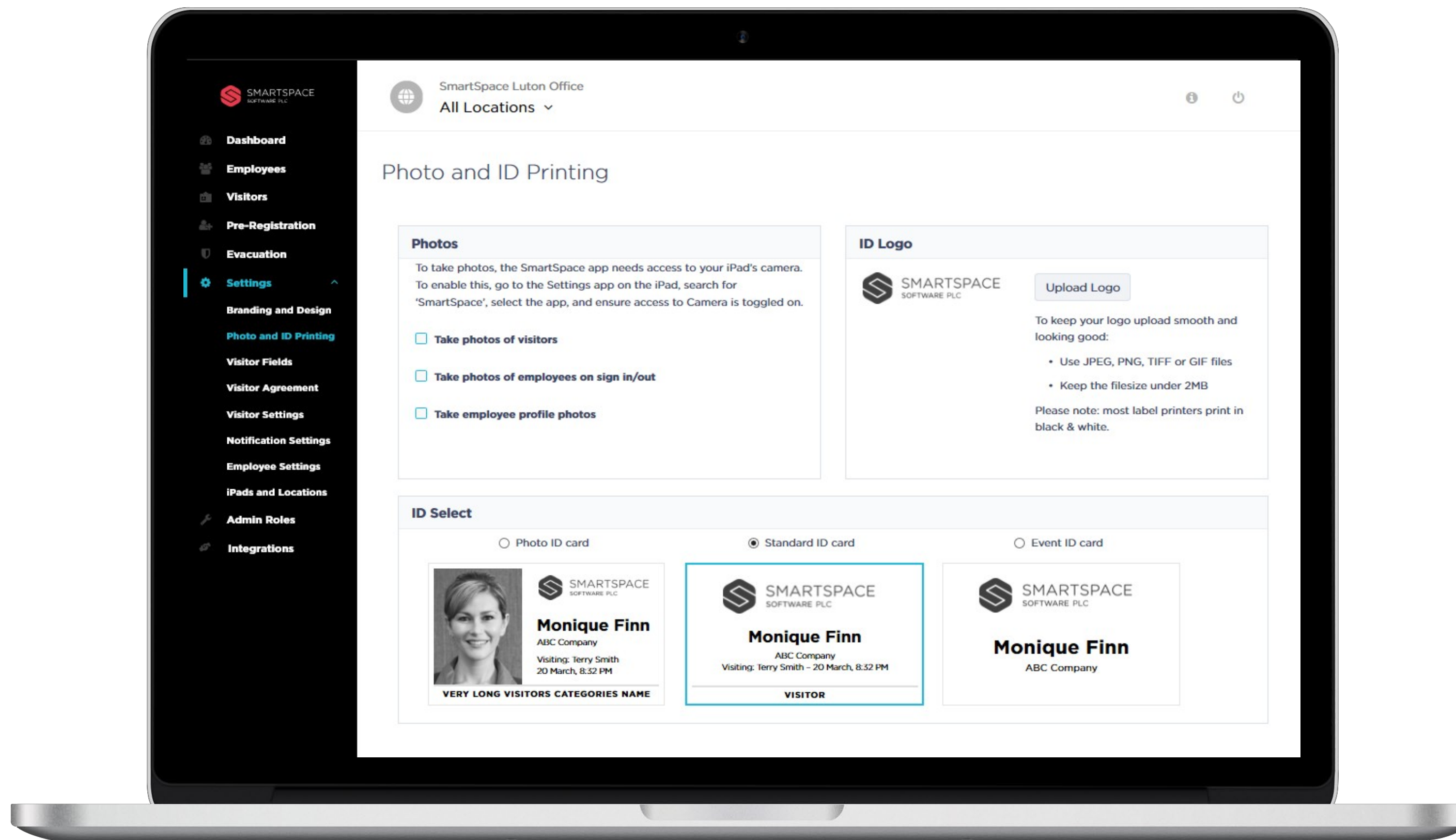
Employee Settings

Use Employee Settings to add custom employee fields to the employee sign in page.

If an employee forgets to sign out, enabling 'auto sign out' will automatically sign them out at midnight.

Organisations with multiple locations can easily allow employees to change their locations by enabling Employee Roaming.

When 'Make sign out messages mandatory' is enabled, ALL employees will be required to leave a sign out message in order to sign out.



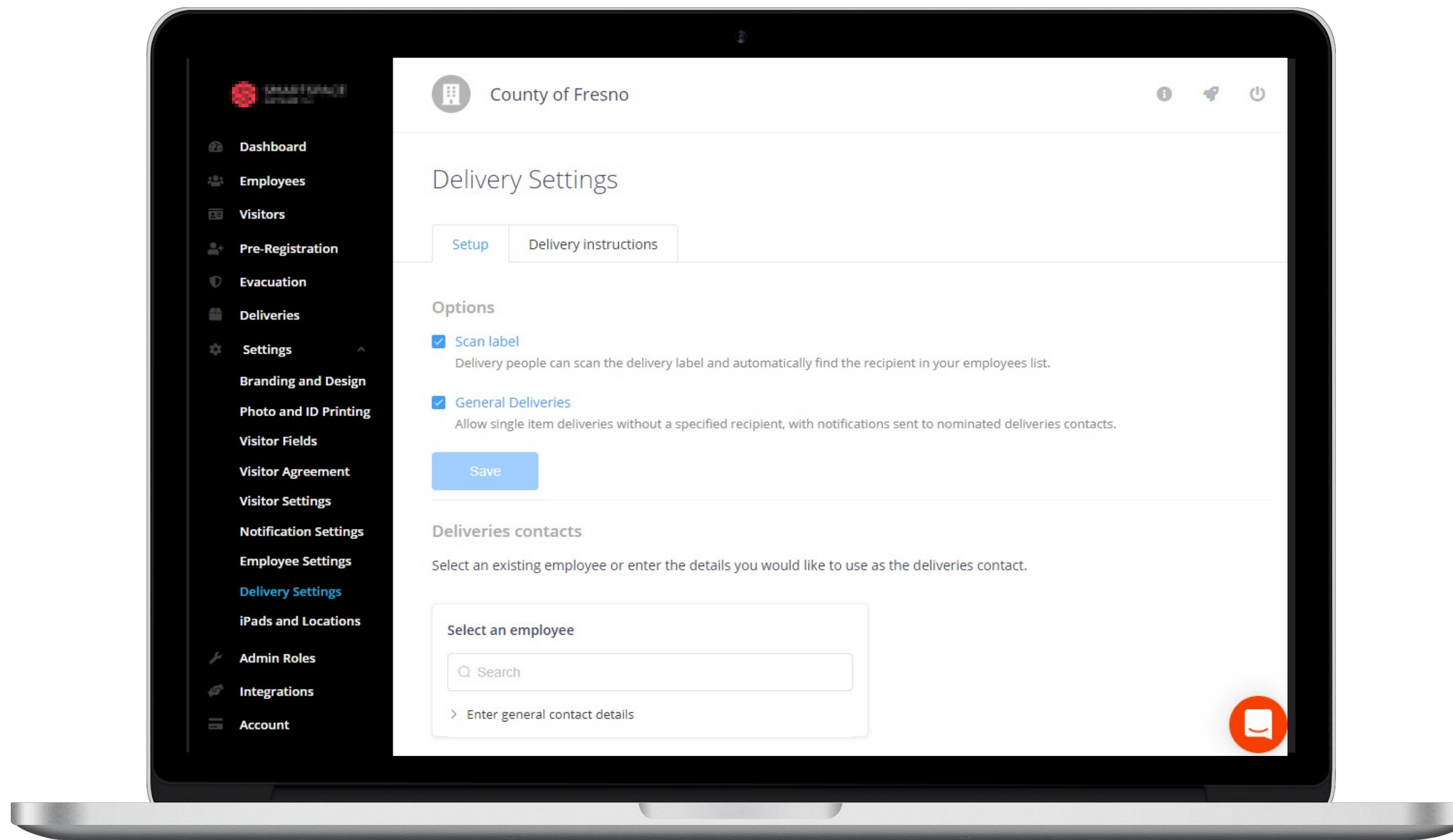
Visitor ID Badges

Connecting a printer to the system enables you to print ID badges for your visitors.

To take photos you will need to enable access to the iPad camera in settings.

Upload a logo, taking note of the on screen tips.

Select your preferred ID badge styles from the available list.



Delivery Settings

Setup the delivery feature to allow the package label to be scanned and the recipient to be found in your employee list.

Single deliveries without a specified recipient can also be allowed. Ensure you select a delivery contact to be notified in these instances.

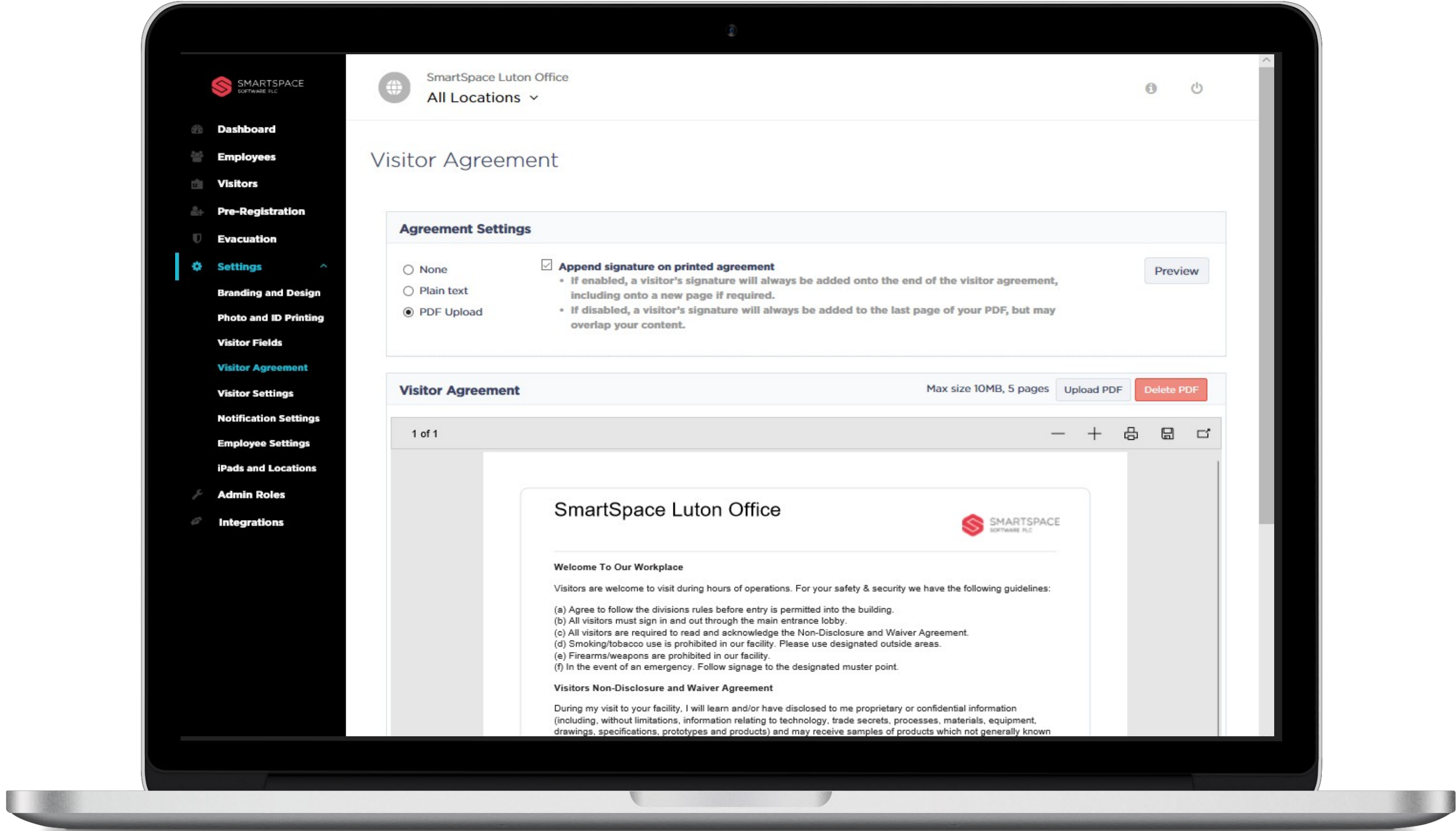
Delivery Instructions allows you to specify the message the delivery person will see when a delivery is made to a specified recipient or for general deliveries.

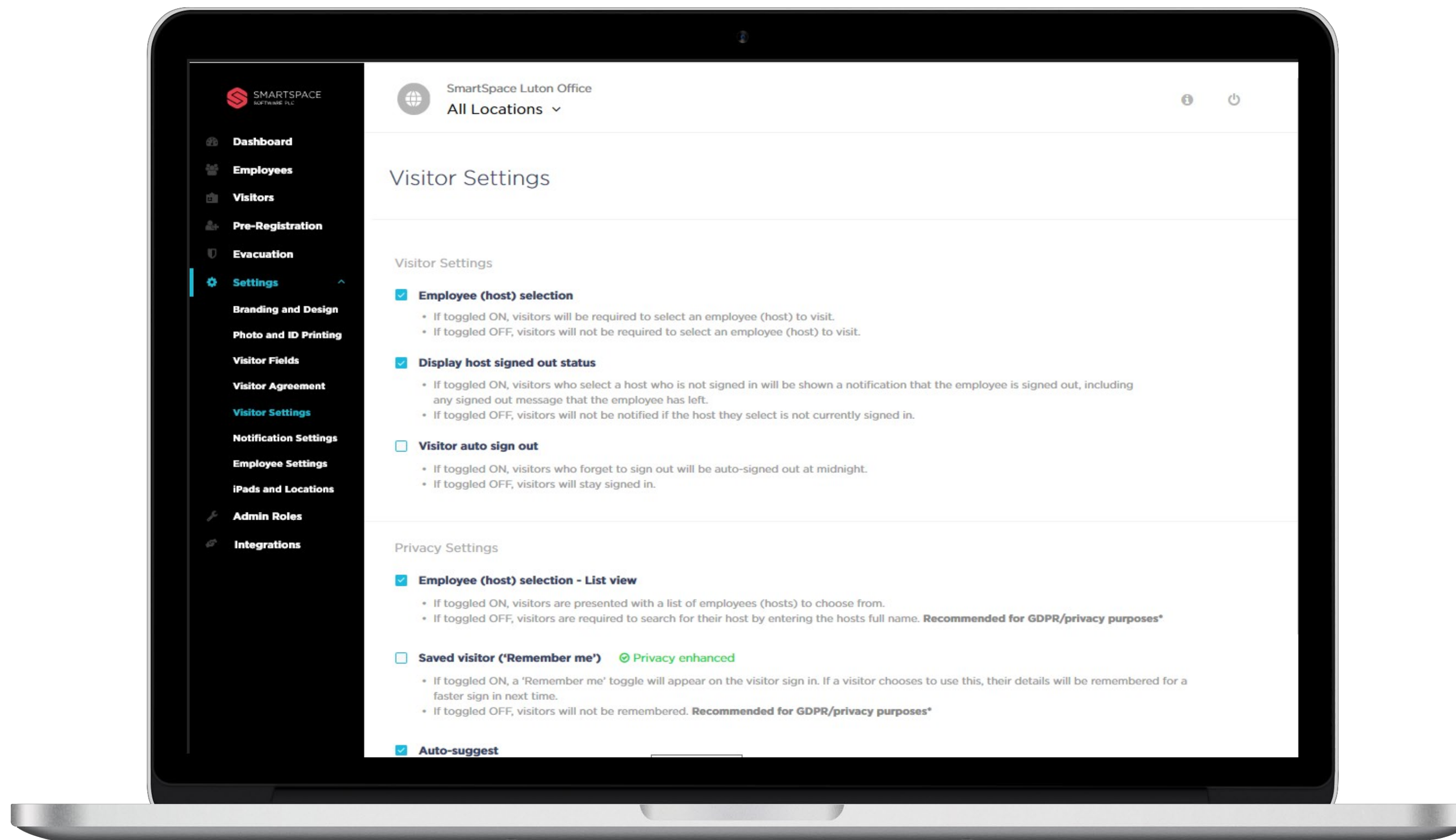
Ensure you save any changes made here.

Visitor Agreement

The visitor agreement section allows you to add a tailored welcome and NDA message for your visitors to sign.

In settings you can specify the format and where the location of the signature.





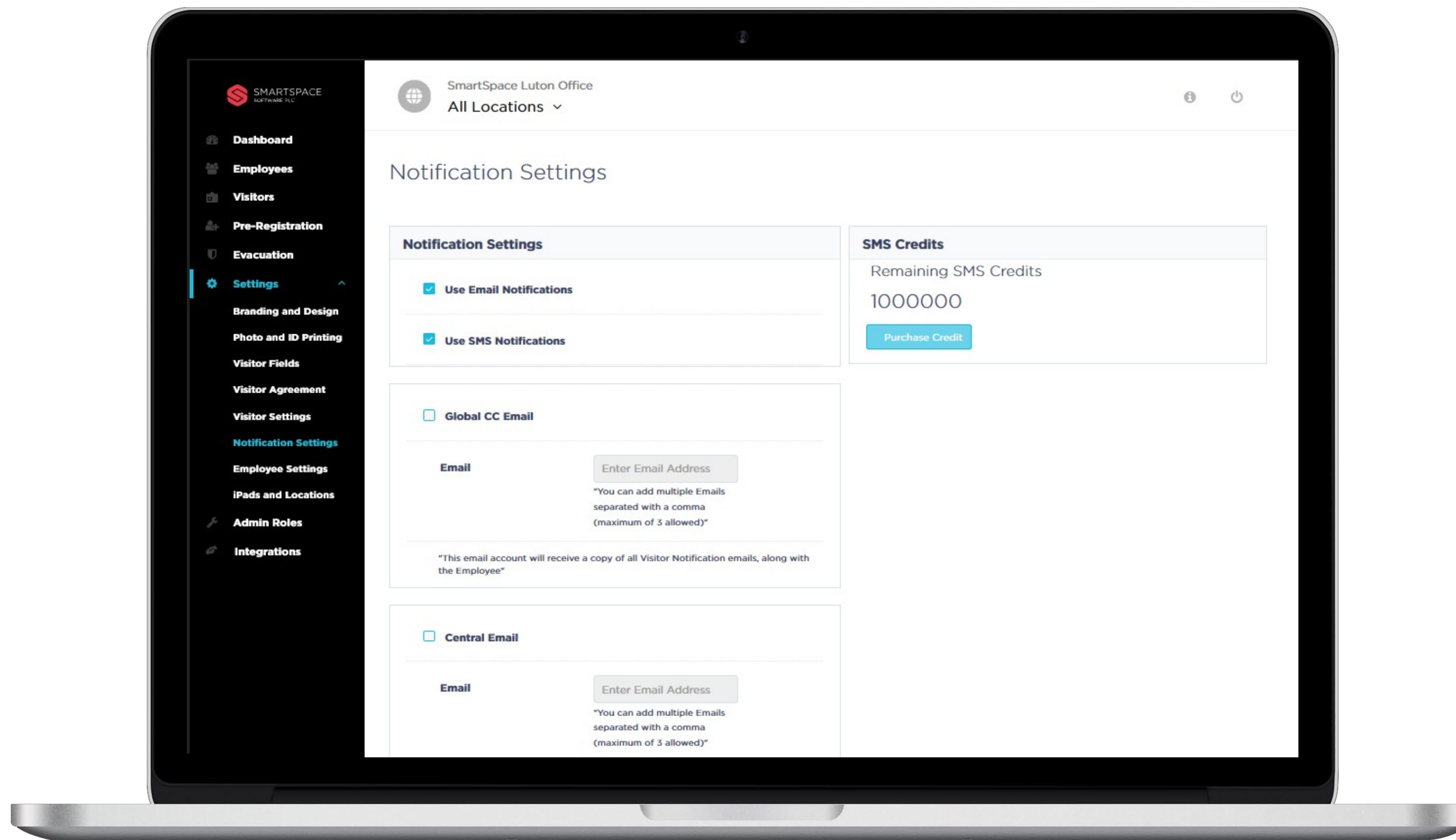
Visitor Settings

Visitor settings allows you to select if the host must be identified by the visitor, when signing in.

You can decide whether to display the hosts status for the visitor to see.

You can also specify if visitors are automatically signed out at midnight.

The privacy settings allows for tighter control on how employee data is displayed. Please take note of the on screen GDPR/Privacy recommendations.



Notifications

As well as host email notifications and SMS messages, you can set up Global and Central email accounts to receive notifications.

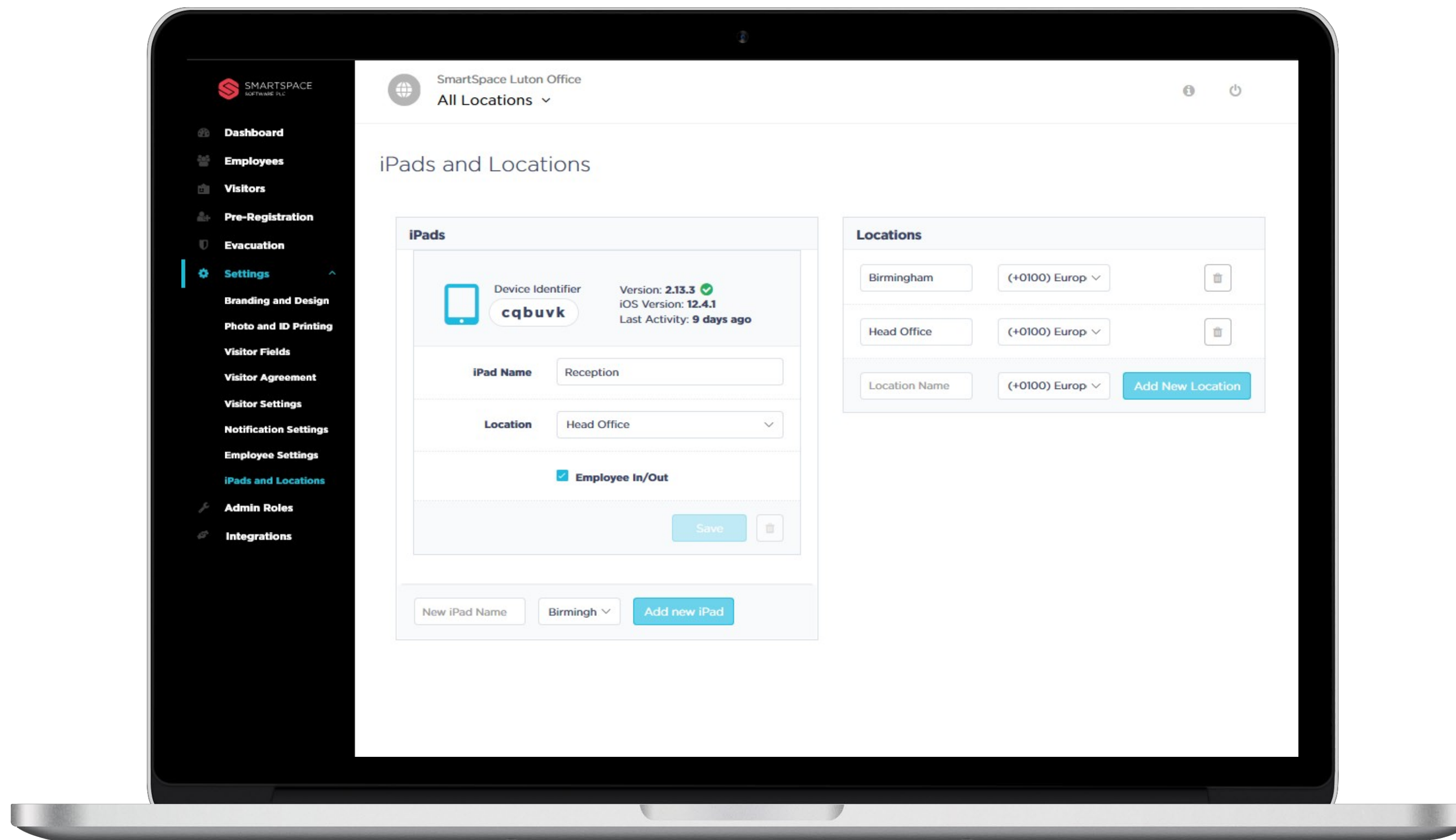
This is useful when more than one person needs to be notified that a visitor has arrived. The different options available are:

Assistant CC Email: is used to CC in an assistant or any other person who you wish to receive your visitor notifications .

Global CC Email: this sends a *copy* of all email notifications to a single email account. The employee with a visitor will also receive the notification,

Central Email: this sends *all* visitor notifications to a single email account. No individual employee is notified.

You can also monitor remaining SMS credits here.



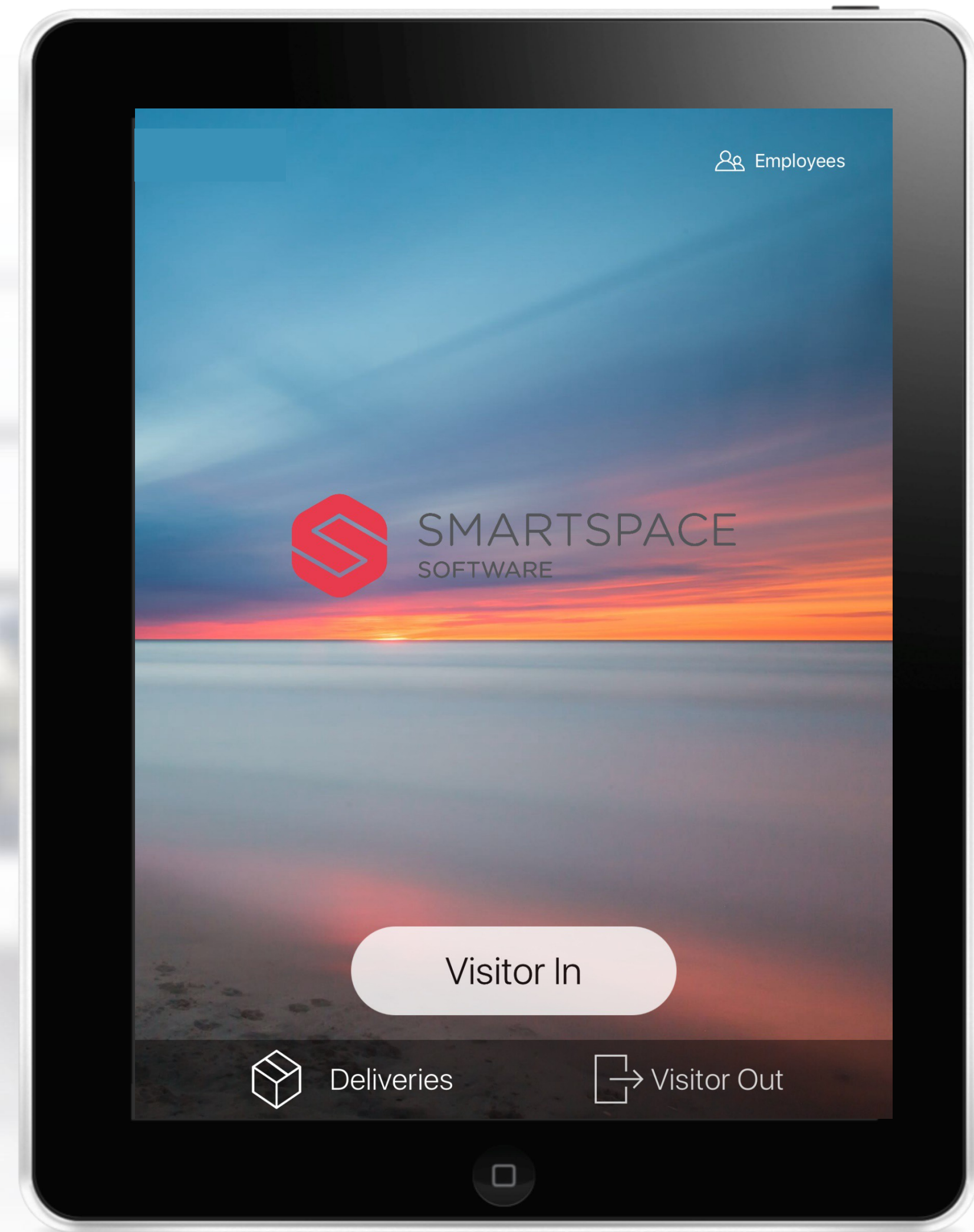
ipads and Locations

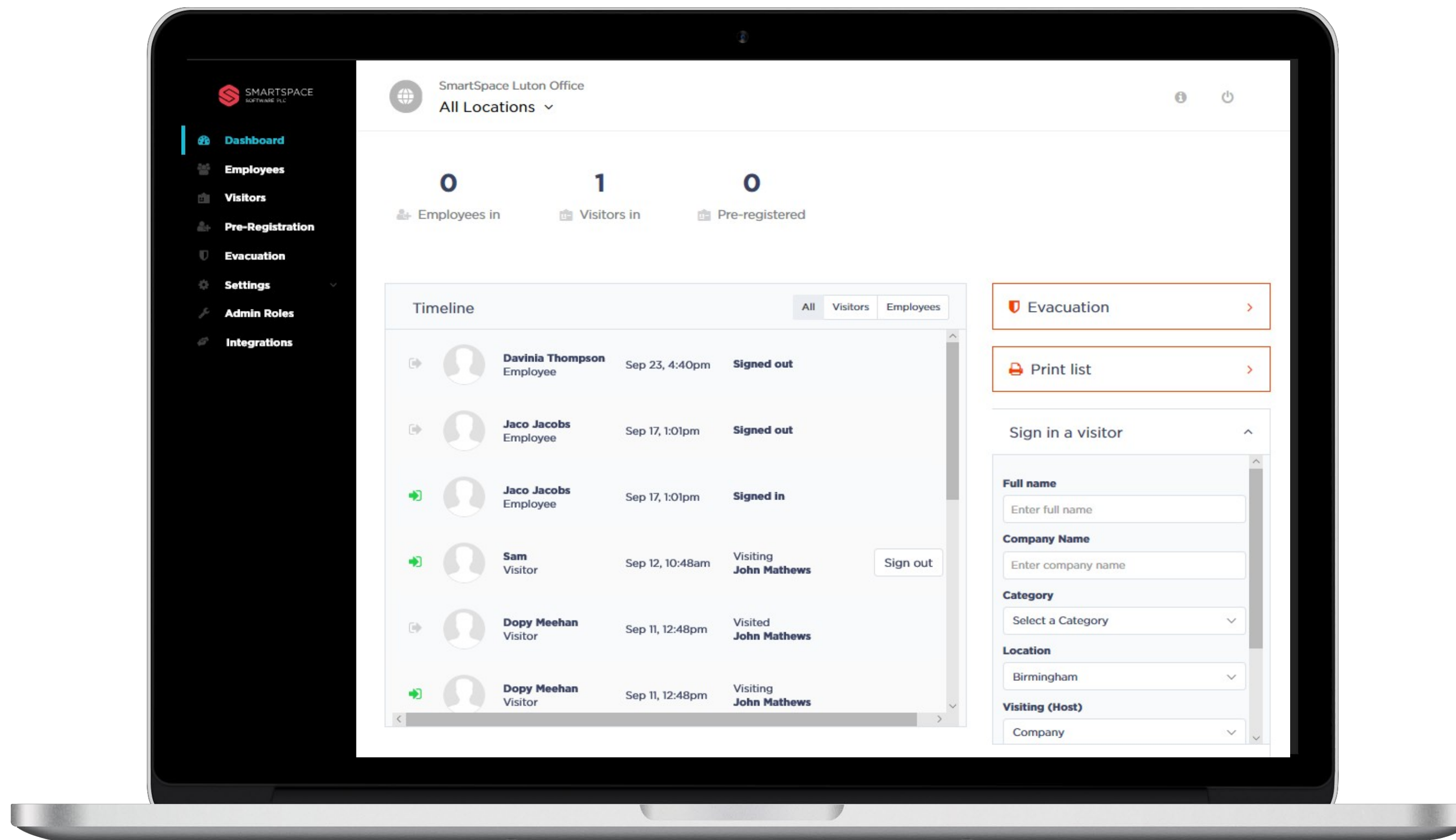
This page displays a list of all connected iPads and their locations.

Use this page to add new locations and their iPads to the system.

Enter the device ID into the new iPad to link it to the iPad name and location.

Web Dashboard Admin





Dashboard

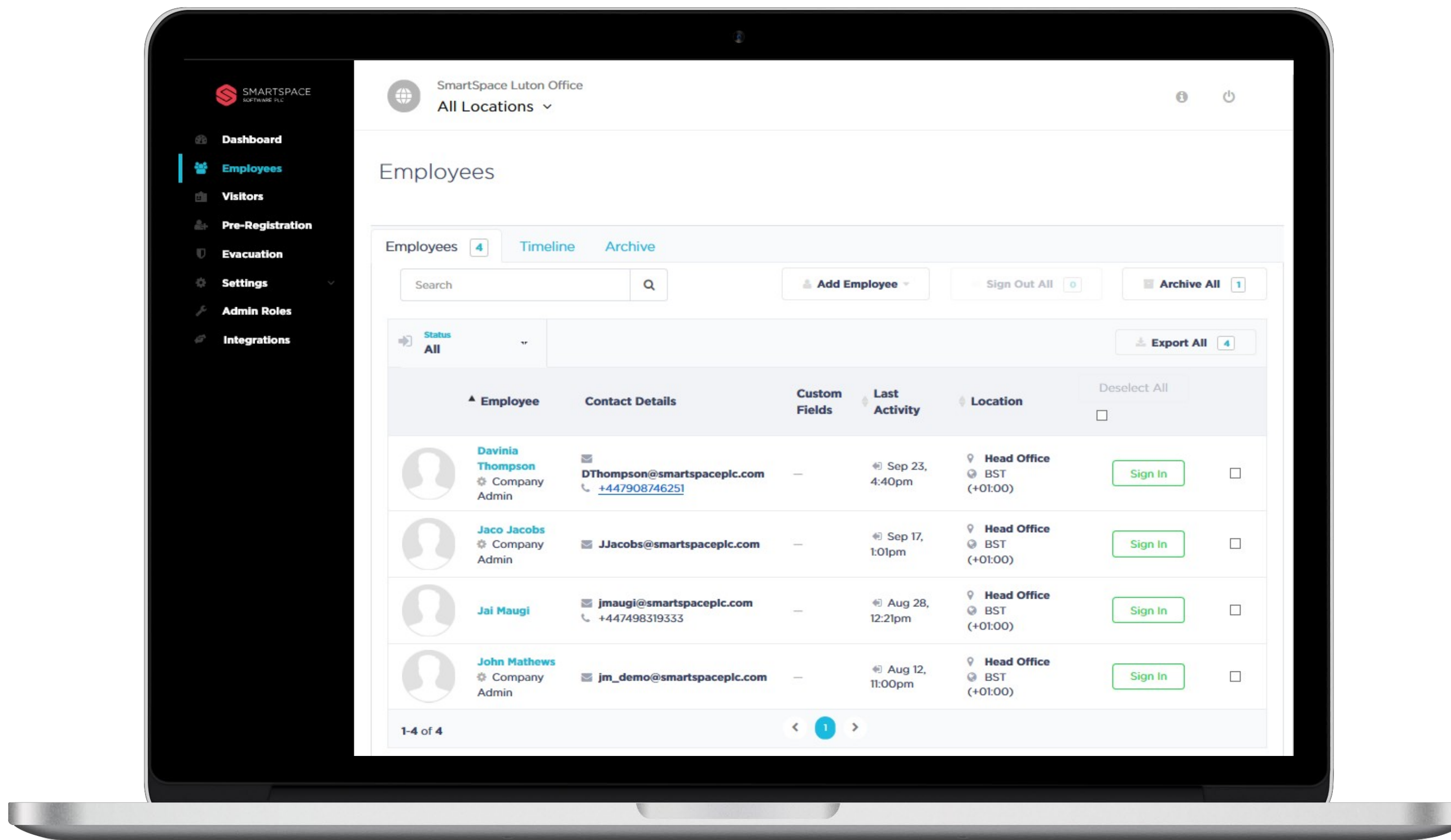
The dashboard gives an overview of Employees and Visitors that are currently signed in.

The Timeline displays a list of date and time stamped activity. The list can be filtered to show Visitors, Employees or All.

The Evacuation list serves as a roll call, this can be printed.

Visitors can also be signed in manually from this page.

Expected visitors can be pre-registered here.



Employees

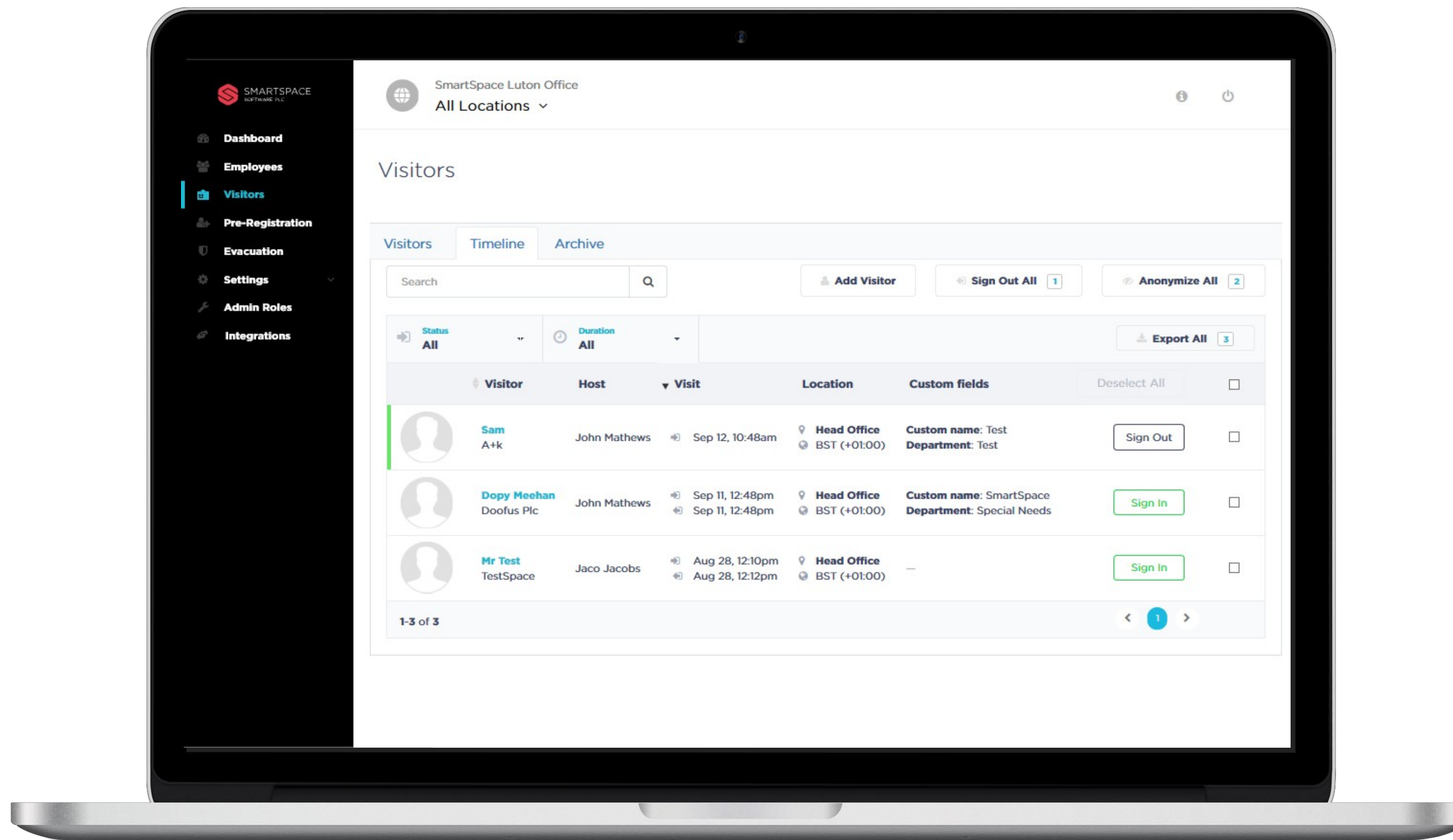
Use this page to view or archive employee information, and add employee details to the database.

The list can be searched and the columns sorted. The filtered list can also be exported to share or print.

Select 'Add Employee' and then 'Add Bulk' then follow the instructions to use the .csv template.

Timeline displays a date and time stamped list of employee activity.

Employees can also be signed in from this screen.



Visitors

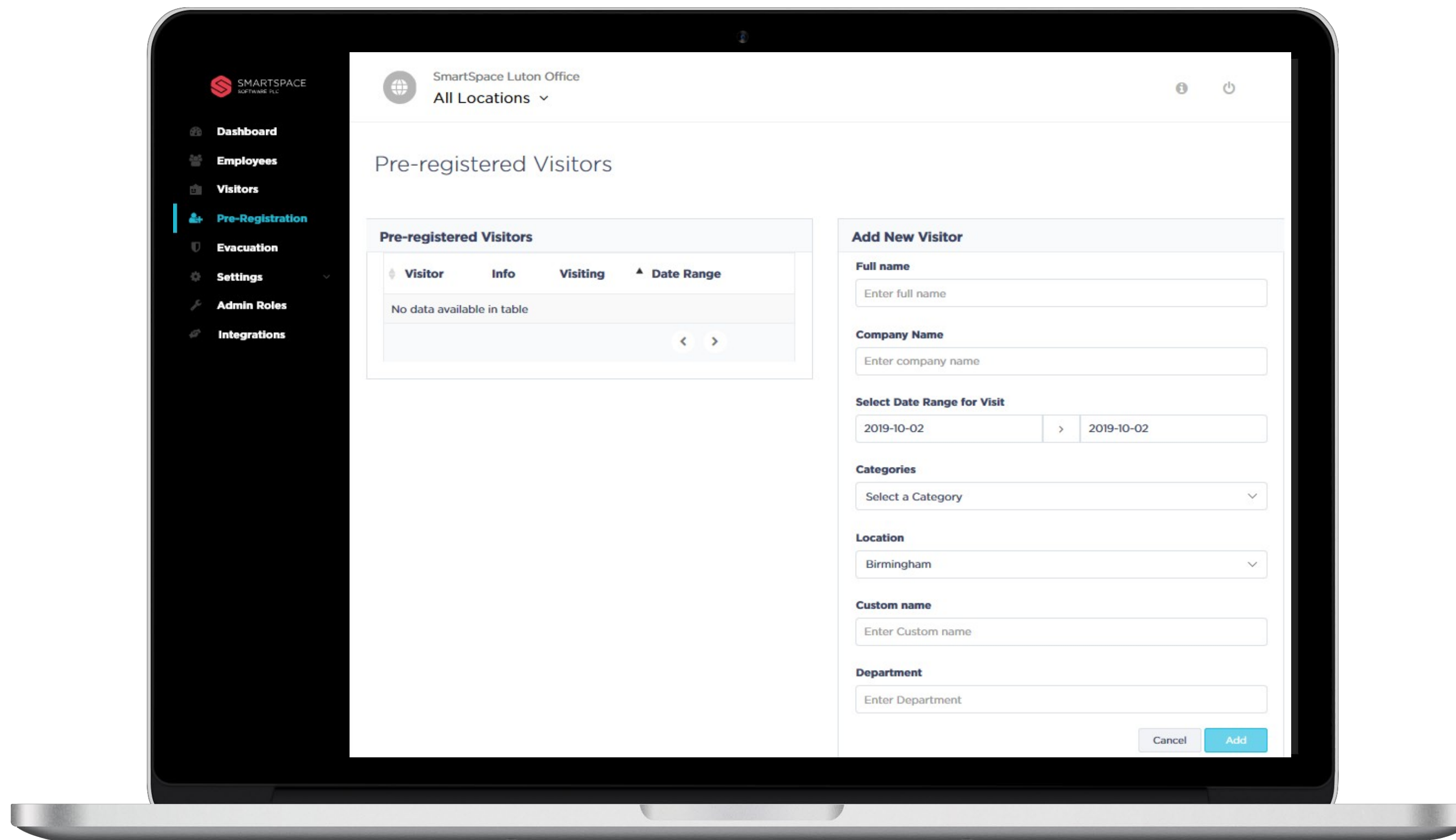
Use this page to view, archive or anonymise visitor information, and add visitor details to the database.

The list can be searched and the columns sorted by Status and Duration. The filtered list can also be exported to share or print.

Select 'Add Visitor' to sign in on behalf of a visitor. .

Timeline displays a date and time stamped list of visitor activity.

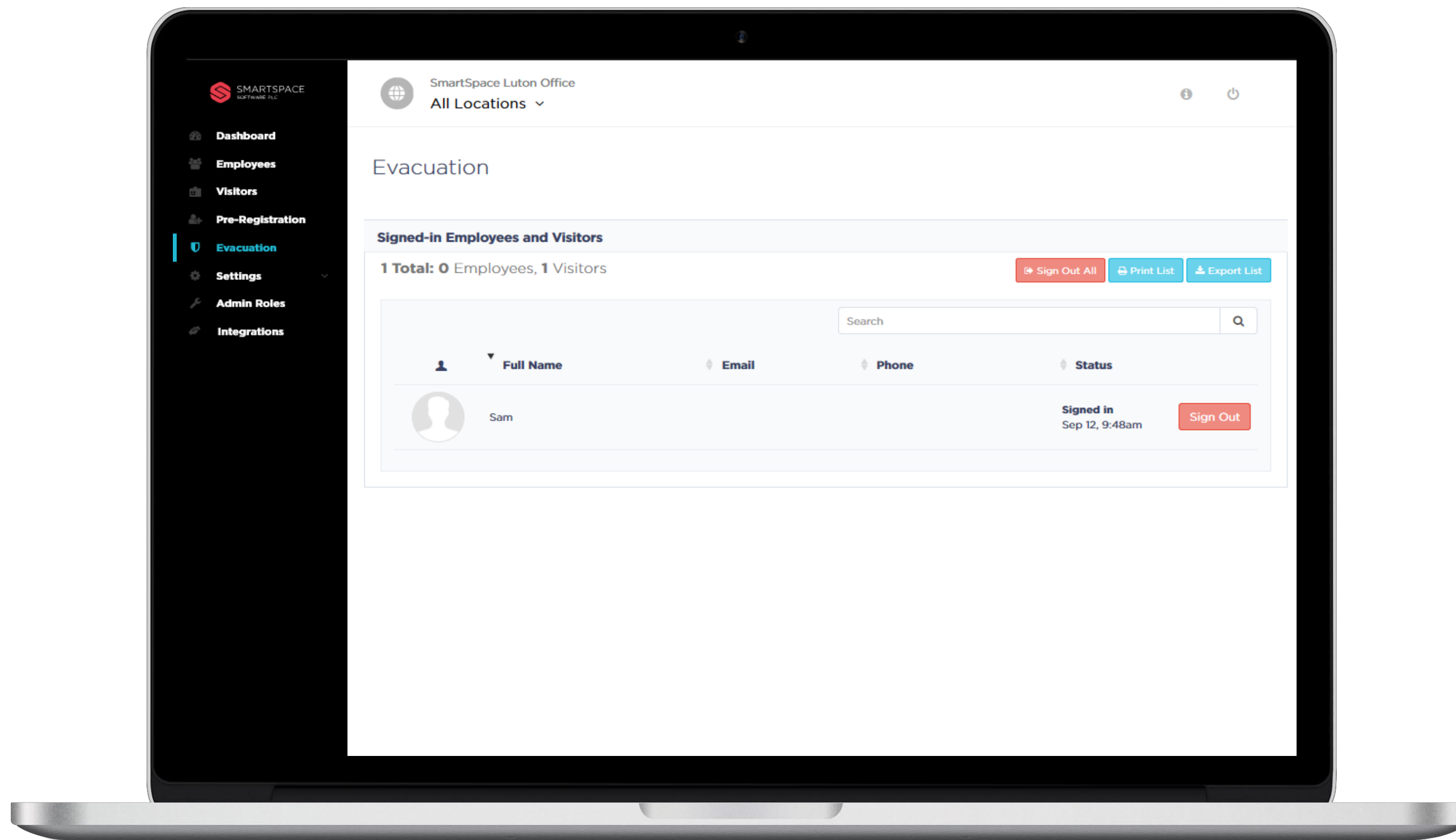
Visitors can also be signed out from this screen.



Pre-registration

Visitor pre-registration allows you to create a visitor in anticipation of their expected visit.

Use the Pre-registered Visitors section before the visitor arrives to allow for a quicker sign in on arrival.

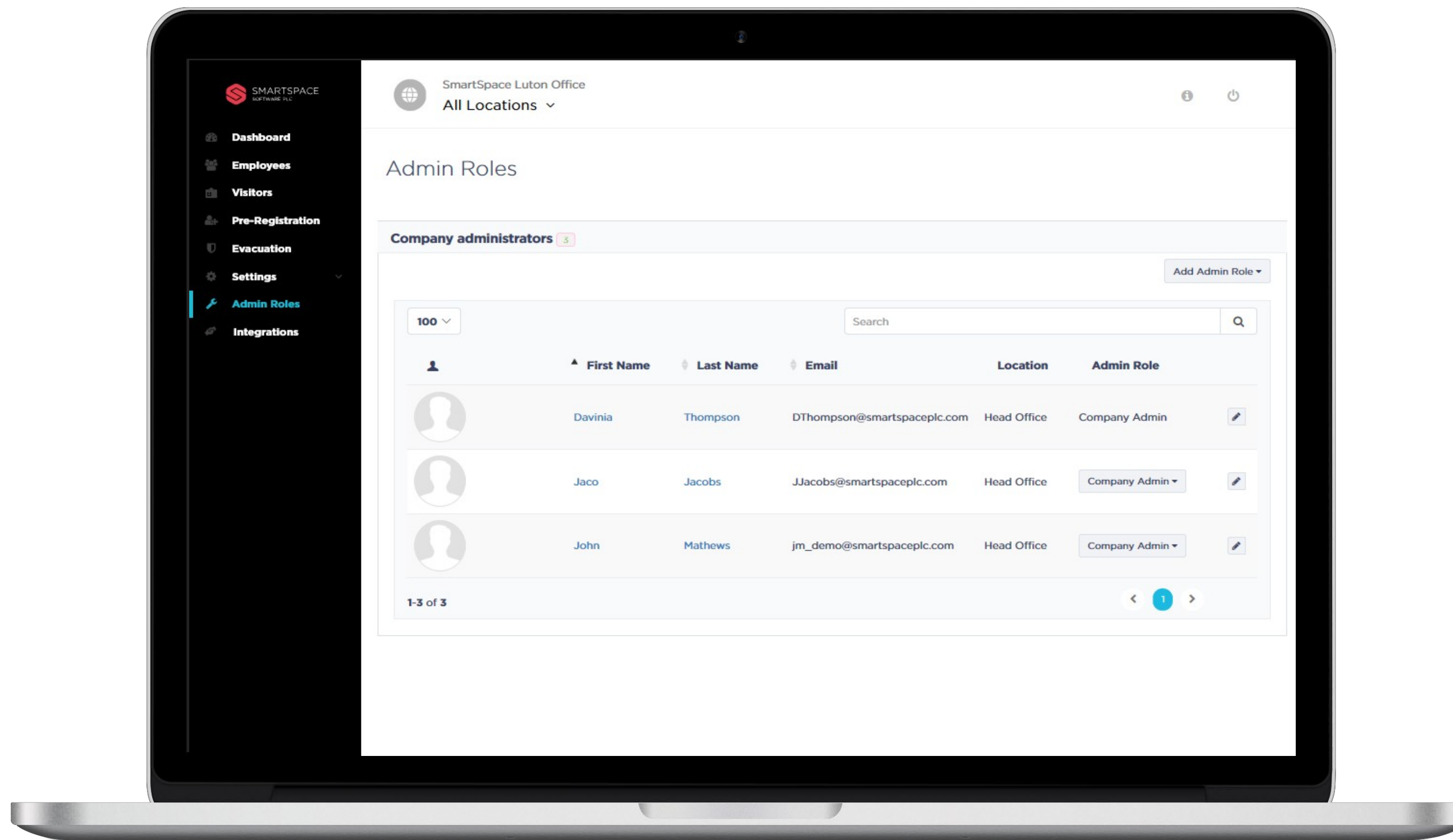


Evacuation

Evacuation Mode is designed to be an aid in Emergency situations and to help identify the whereabouts of those onsite.

Evacuation on the admin dashboard allows you to:

- Sign out all
- Print list
- Export List



Admin Roles

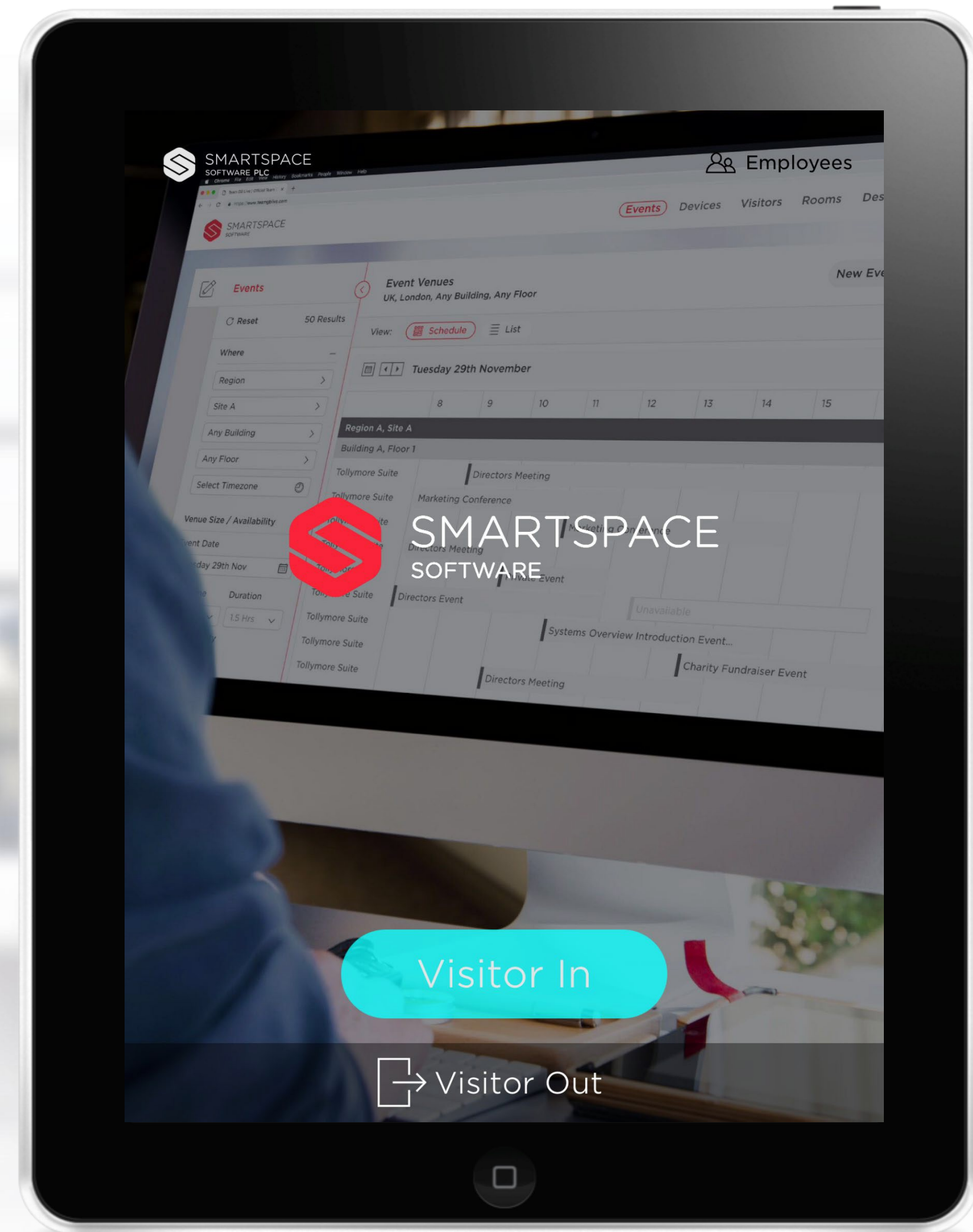
Admin roles are assigned to employees that require access to the web dashboard.

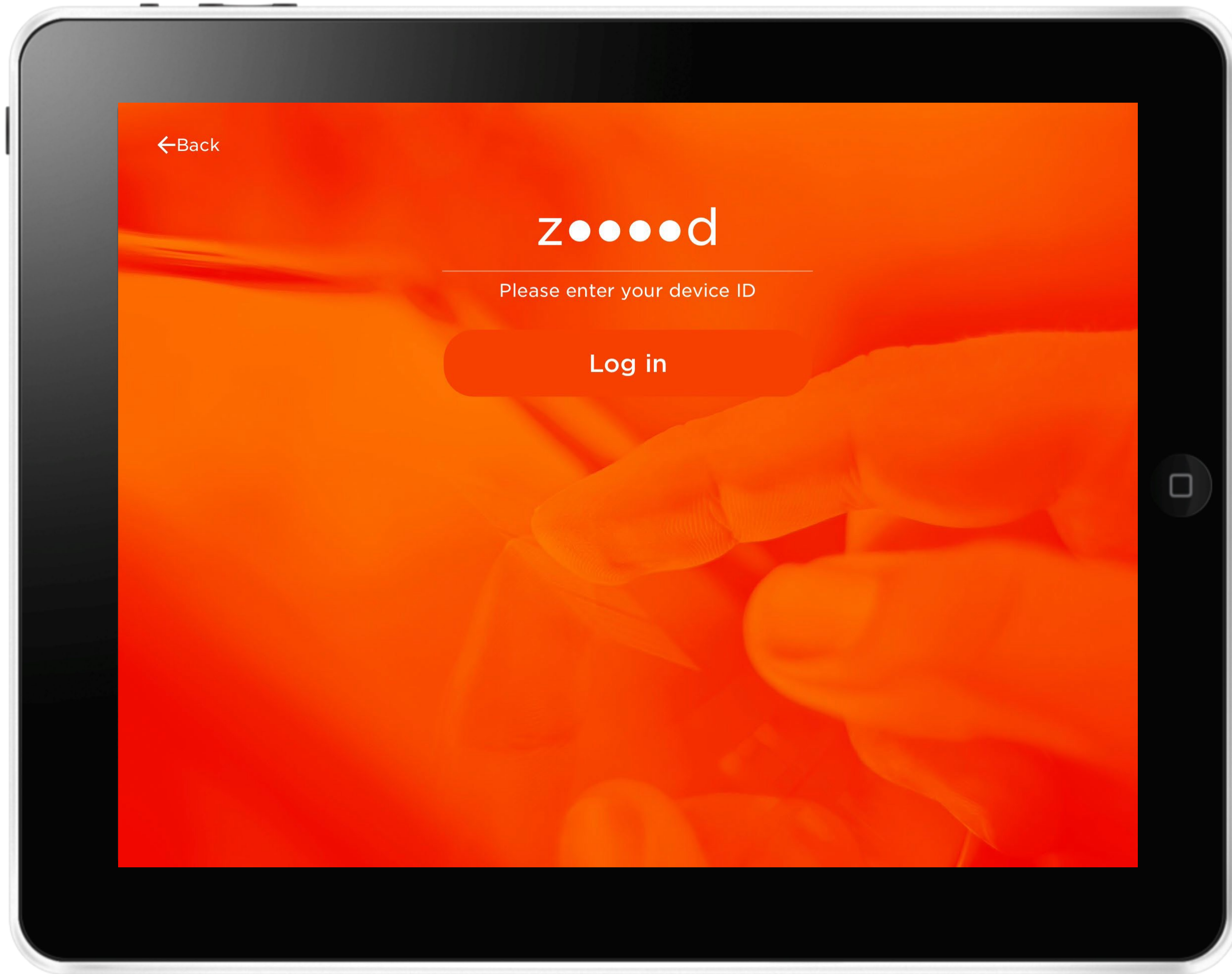
These roles are comprised of company admins and location managers.

A 'Company Admin' role elevates the privileges of a user and allows them to configure company wide changes. A company admin has access to ALL settings within the visitor management web dashboard.

A 'Location Manager' allows for lower level privileges meaning a location manager can only perform basic functions and does not have access to any of the 'Settings' or 'Accounts' tabs. A 'location manager' can create and assign additional Location Manager roles only for the location that they have been assigned.

Visitor User Interface

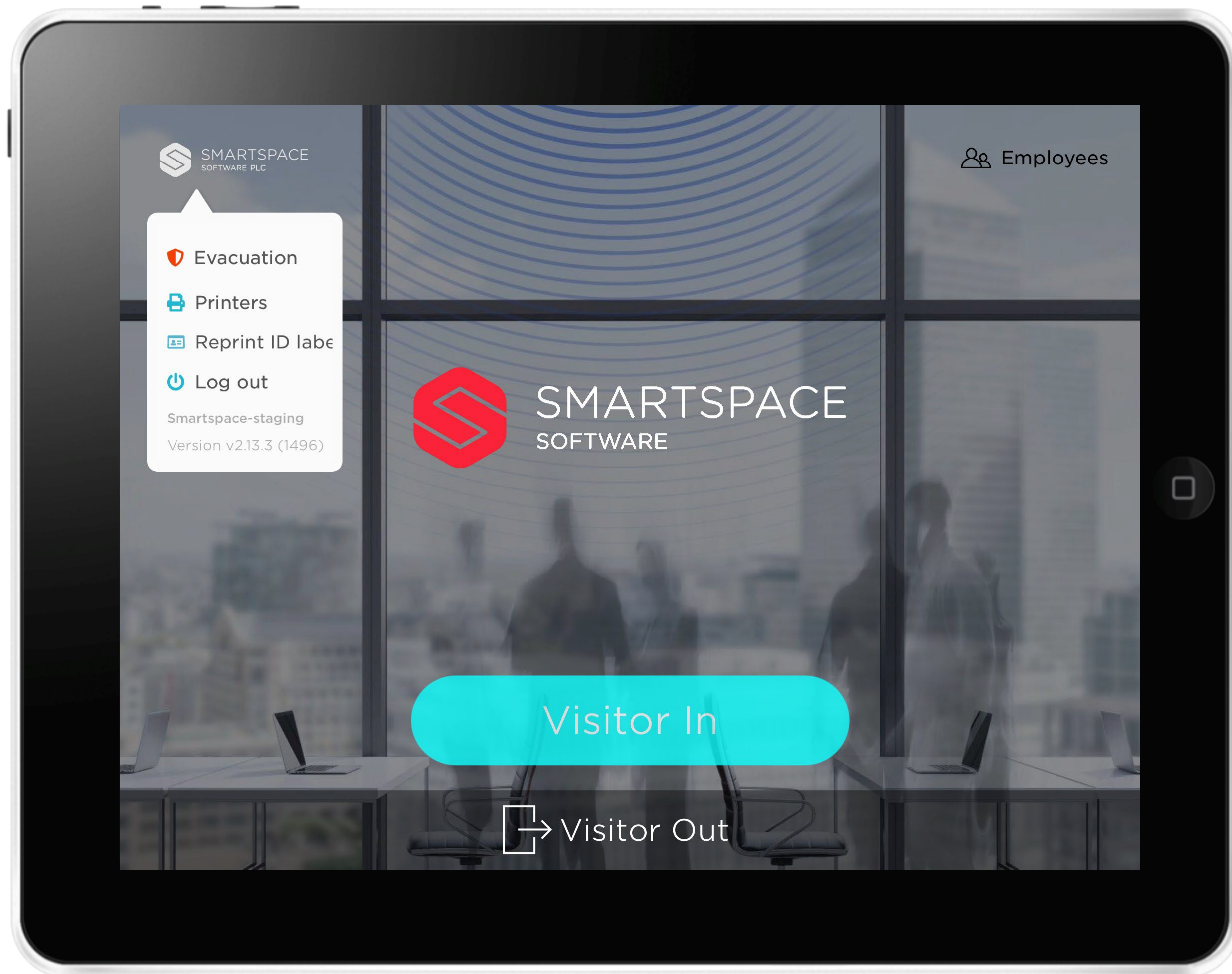




Select Device ID

Use the iPad and Locations section to add and link the iPad to its location. Input the device ID and tap Log In.

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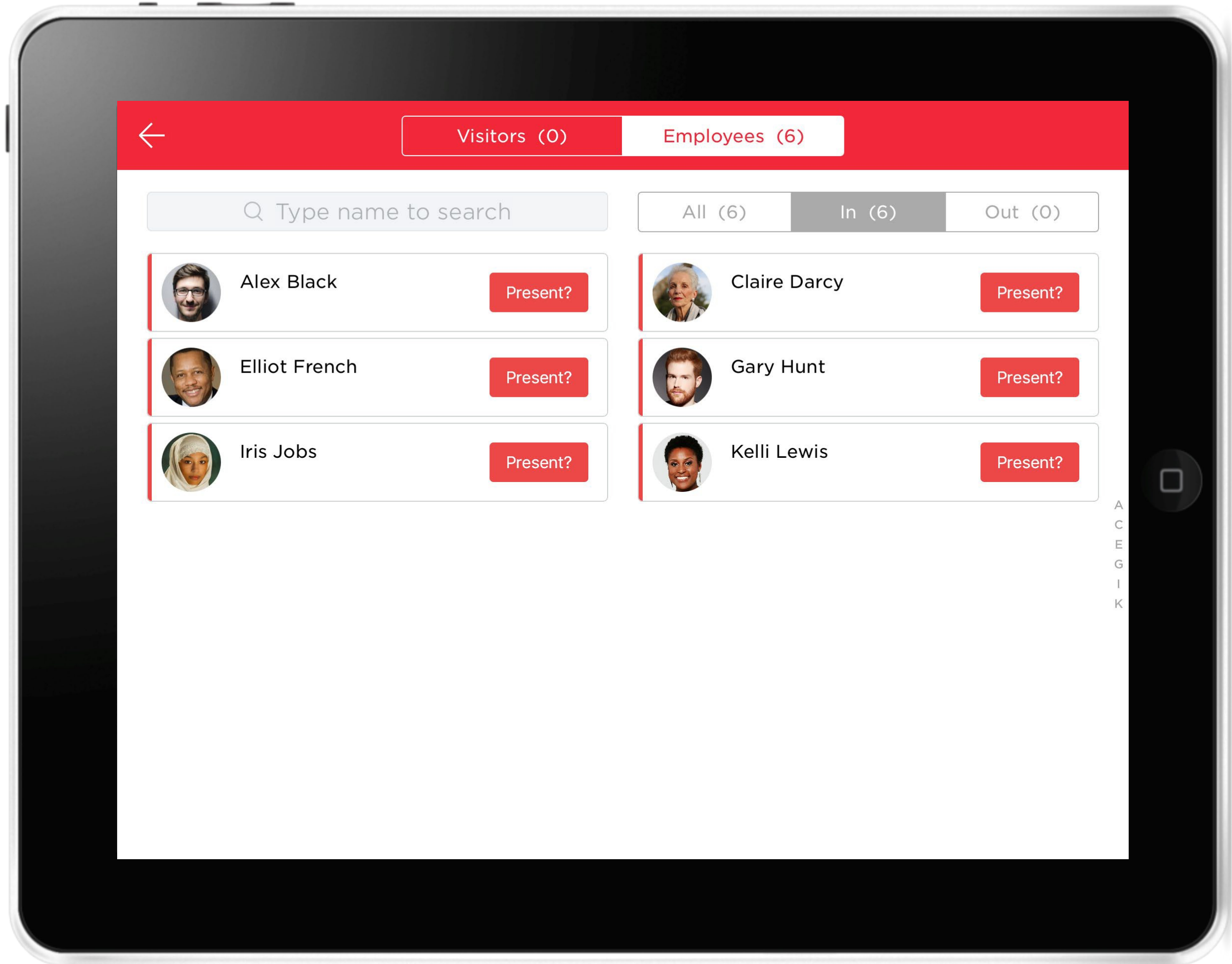


Home Screen

The home screen will rotate through screen savers whilst displaying the option for visitors to sign or out.

Triple tap the SmartSpace logo in the top left corner to open up an additional menu:

- Evacuation – activates Evacuation mode
- Printers Setup
- Reprint ID label
- Log Out



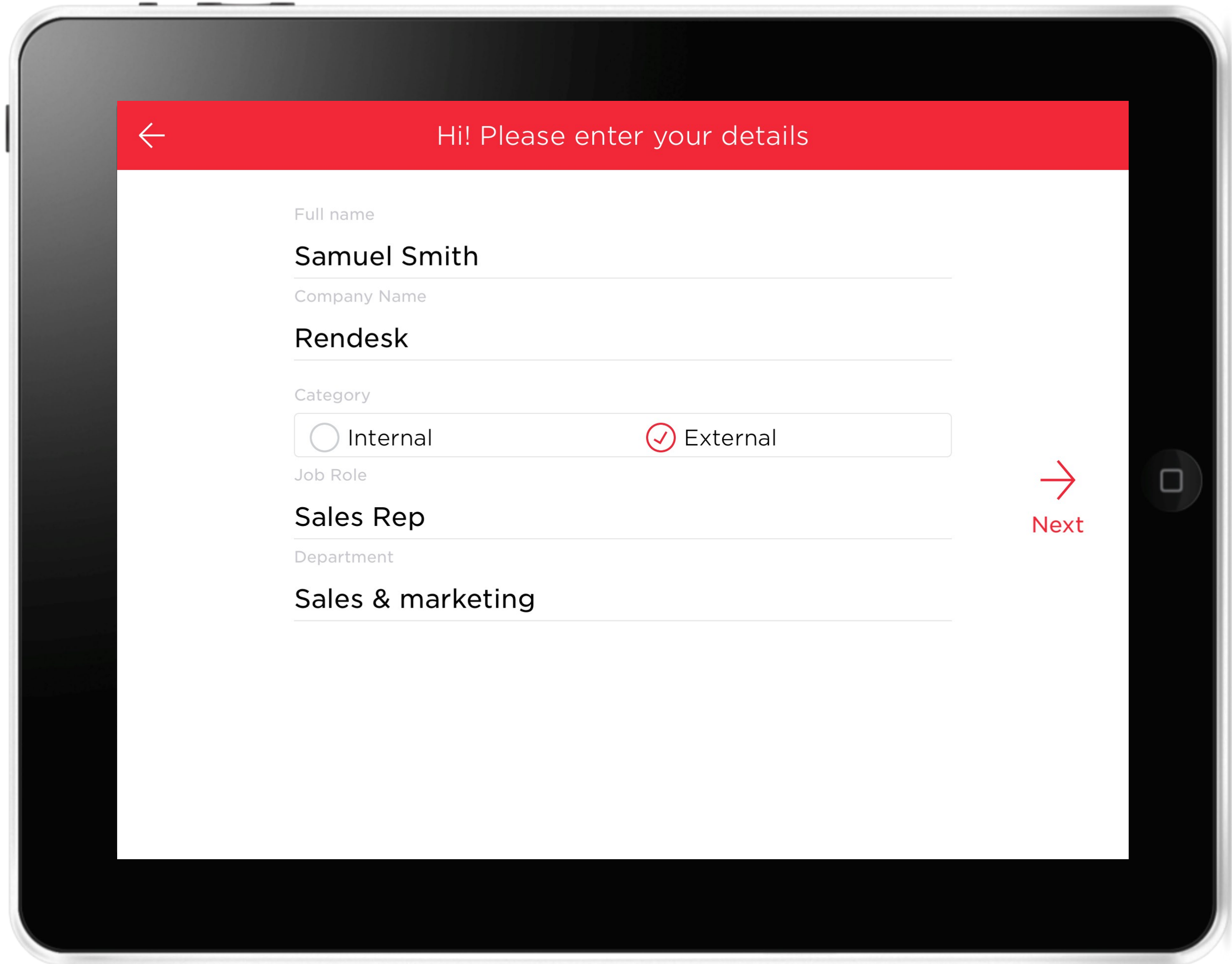
Evacuation Mode

To activate give the iPad a 'Shake', this will show a message that asks 'Do you want to active Evacuation Mode?' Alternatively triple tap the SmartSpace logo to access an additional menu.

Two tabs are visible, one will show all visitors and the other tab will display all employees.

If using the 'Employee In/Out' feature, this will display the status of the employees next to their name.

Visitors and employees who have signed in will show a red 'Present?' button next to their name to be tapped in order to mark those signed in and accounted for as 'Safe'.

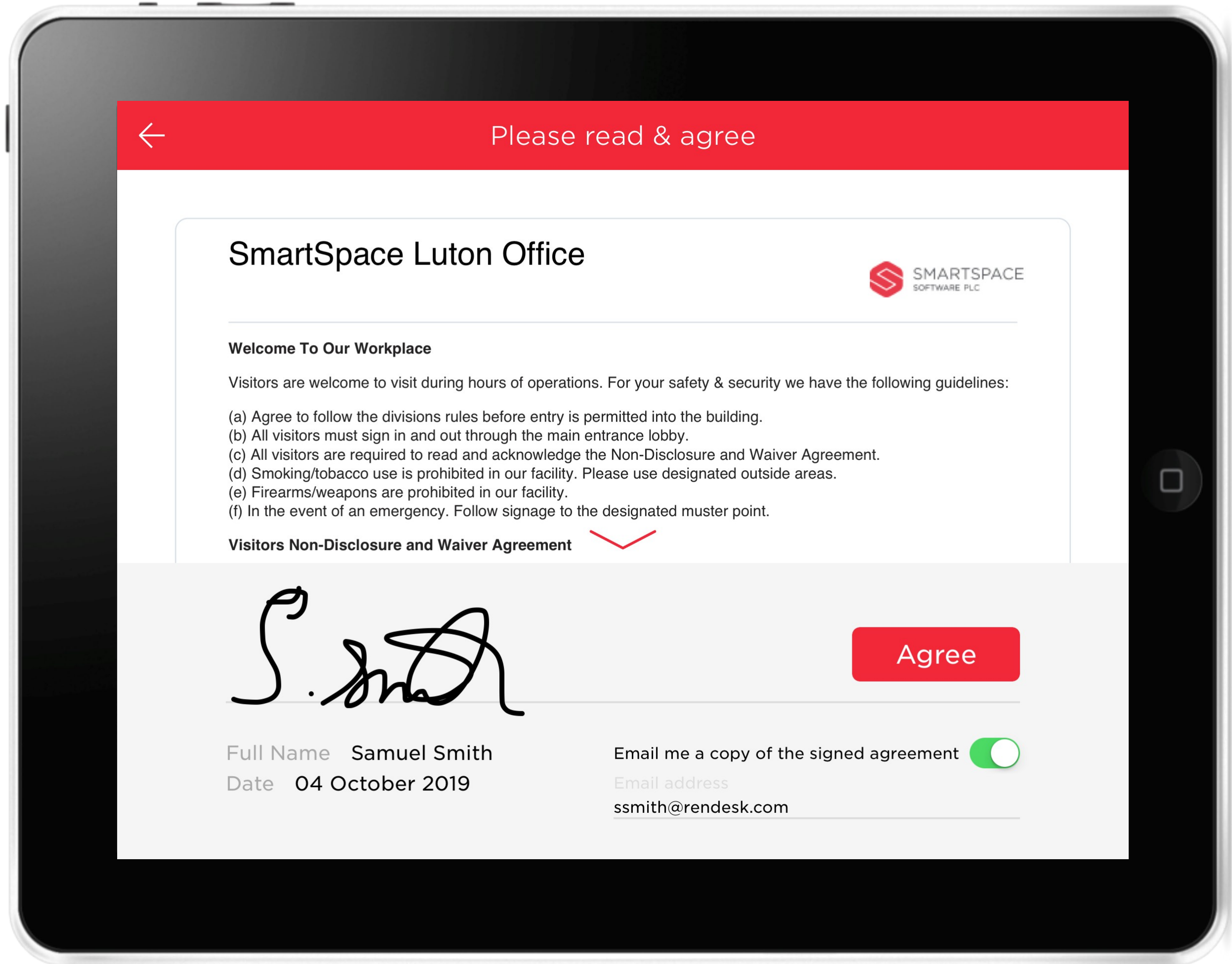


Visitor Sign In

Tap 'Visitor In' to begin the sign in process for a visitor.

Enter the details requested, ensuring that required fields are completed in order to progress.

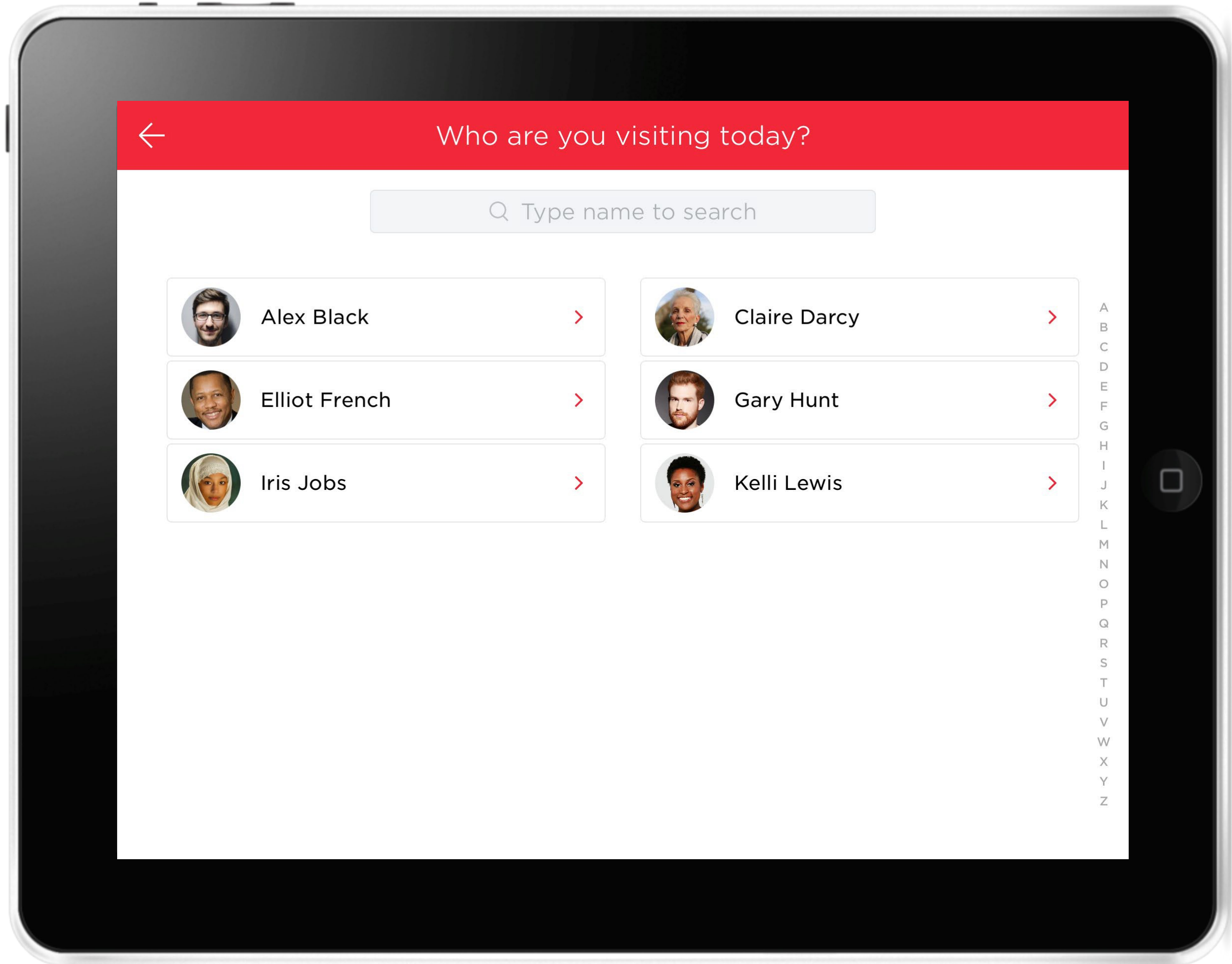
Tap 'Next' when everything is complete.



Welcome & NDA

Visitors are requested to read and sign a welcome and NDA message that has been tailored/uploaded in the web dashboard.

Visitors can request a copy to be emailed to them.

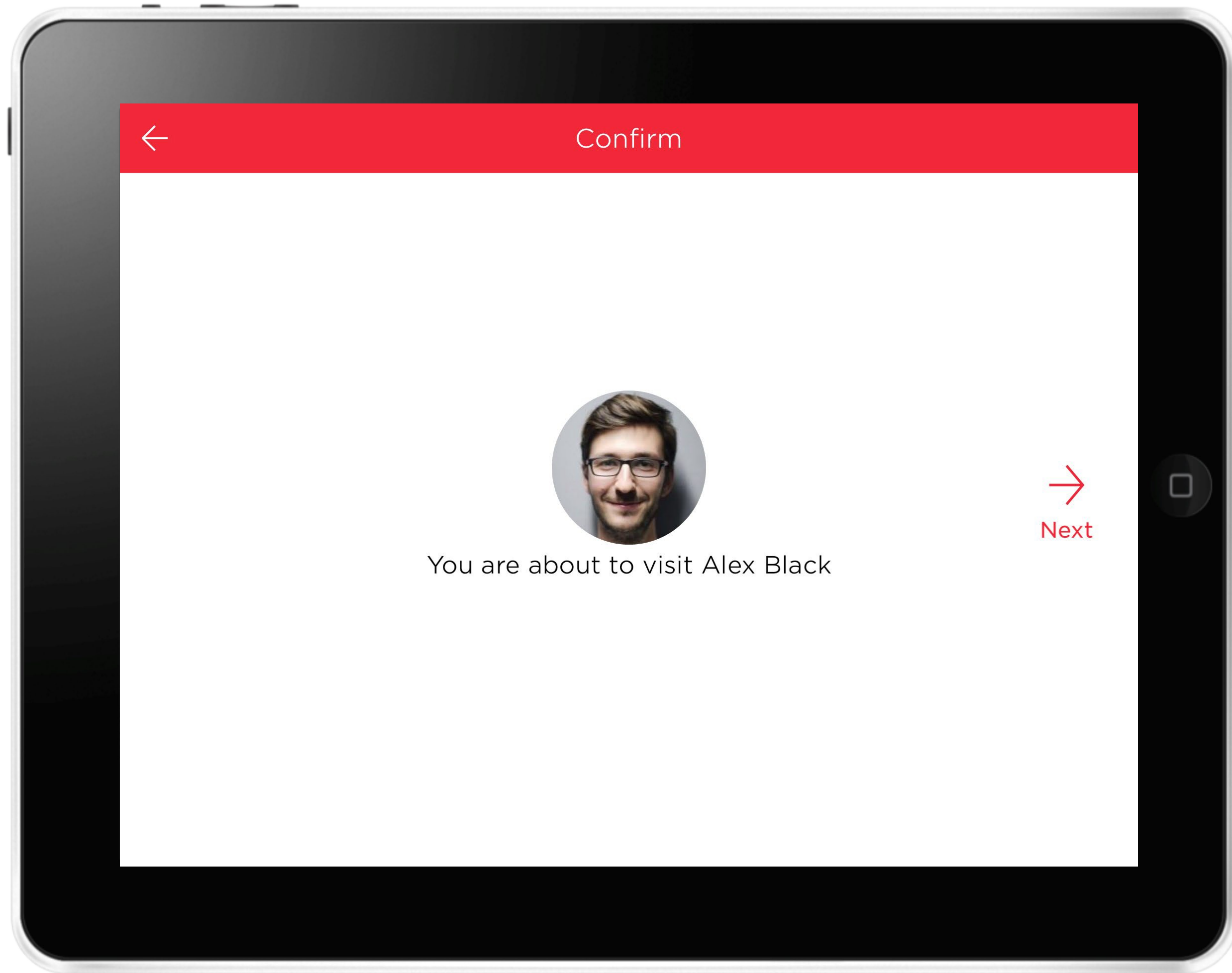


Select Host

Depending on employee privacy settings, visitors will be able to select the employee they are here to visit from a list.

Or begin typing the host name to filter the list.

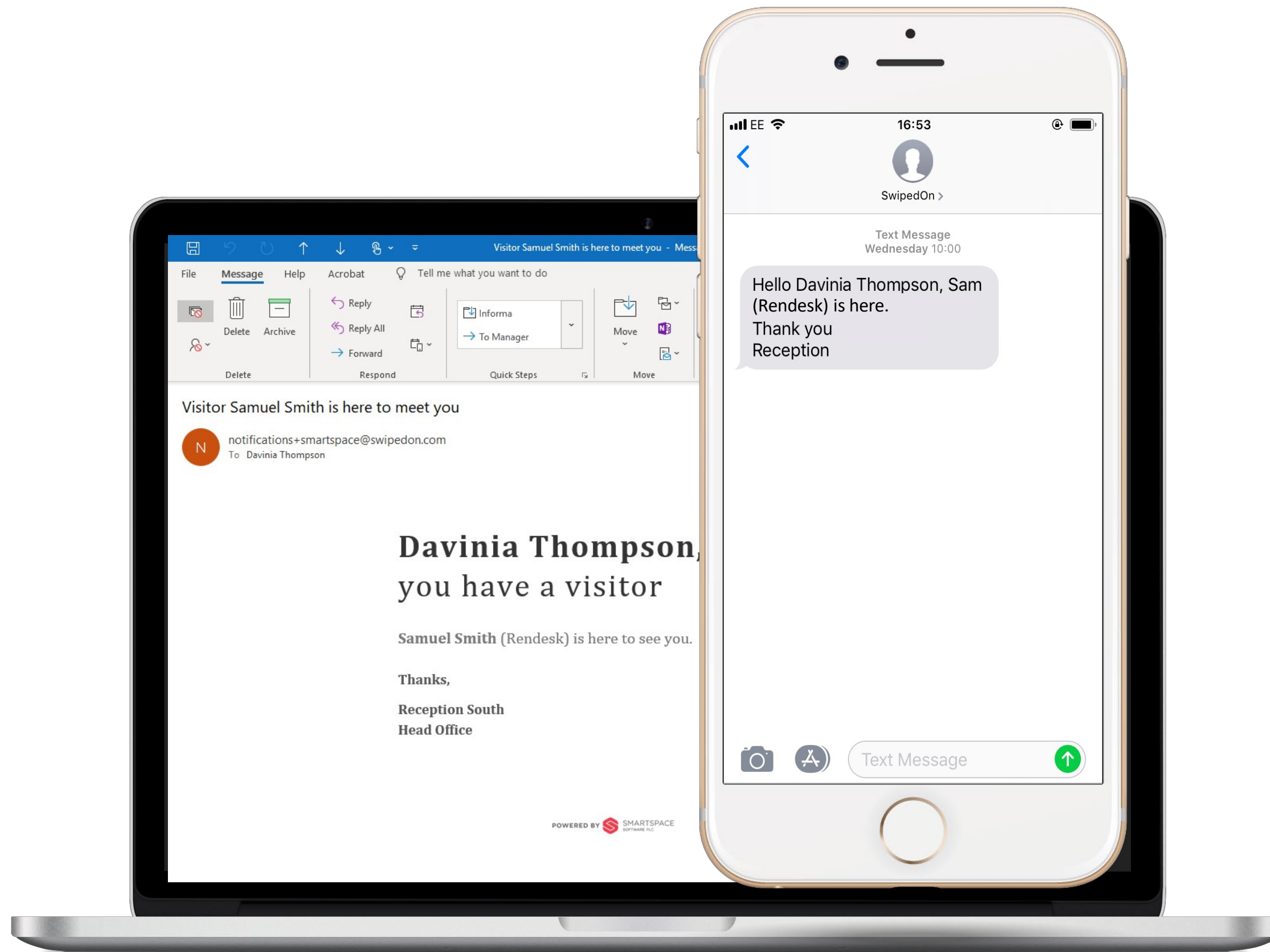
Tapping the name will select that host.



Confirmation Message

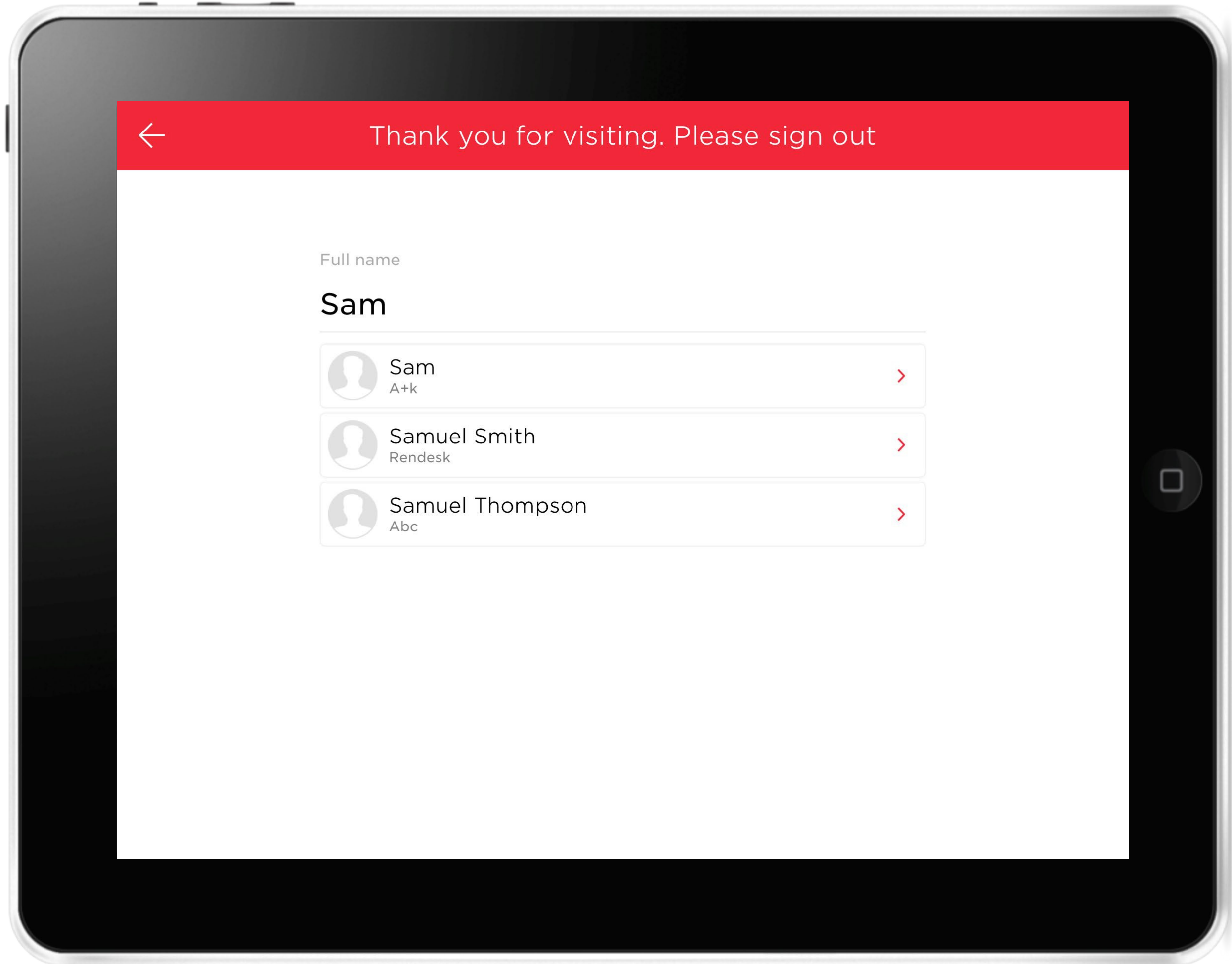
If uploaded the visitor will be able to see a profile picture of their host.

Tapping 'next' will complete the signing in process.



Notifications

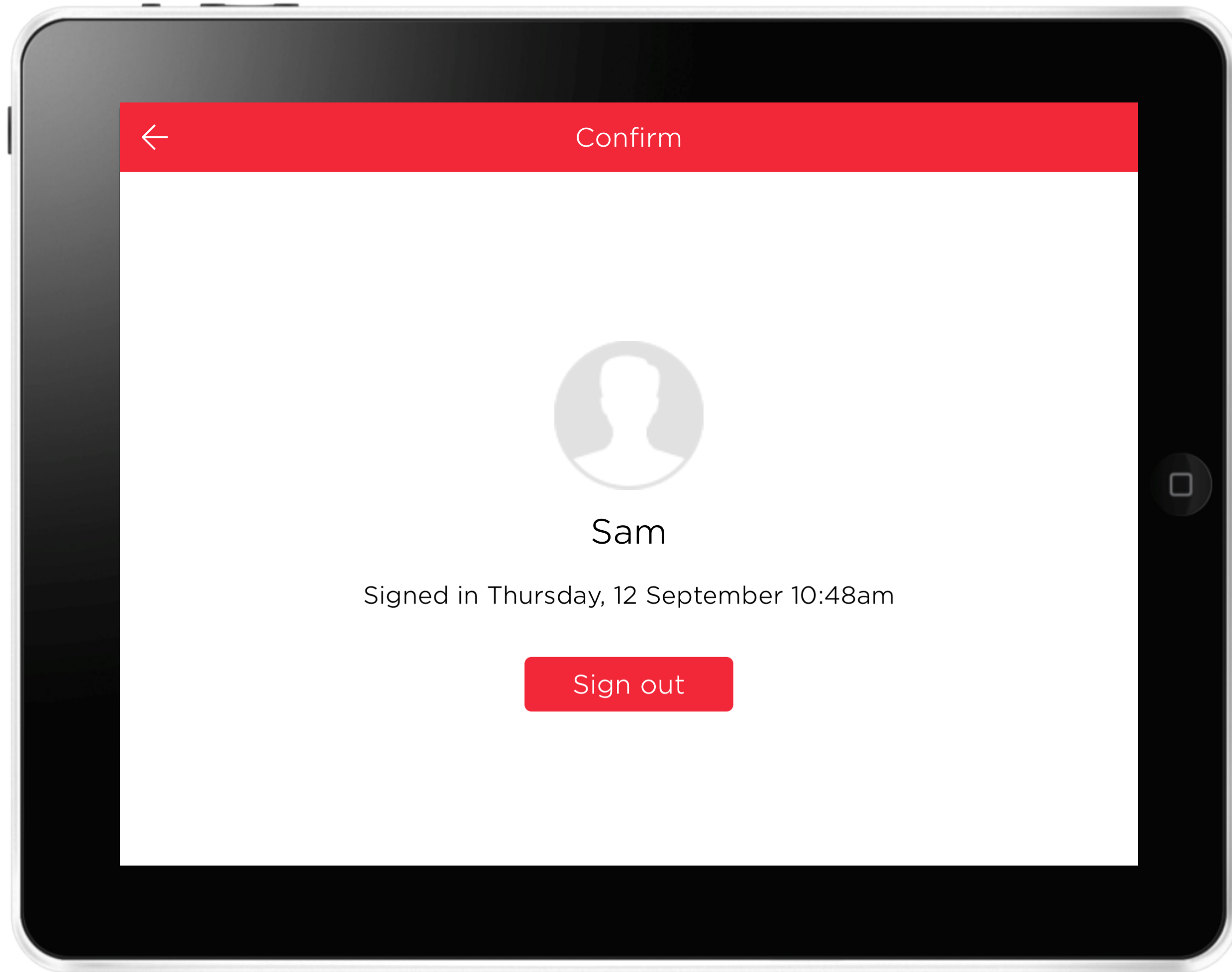
Depending on the Notification settings, hosts can receive SMS and/or Email notification messages to alert them that their visitor has arrived.



Visitor Sign Out

Tap 'Sign Out'

The visitor will be able to begin typing their name and then select it from the filtered list.

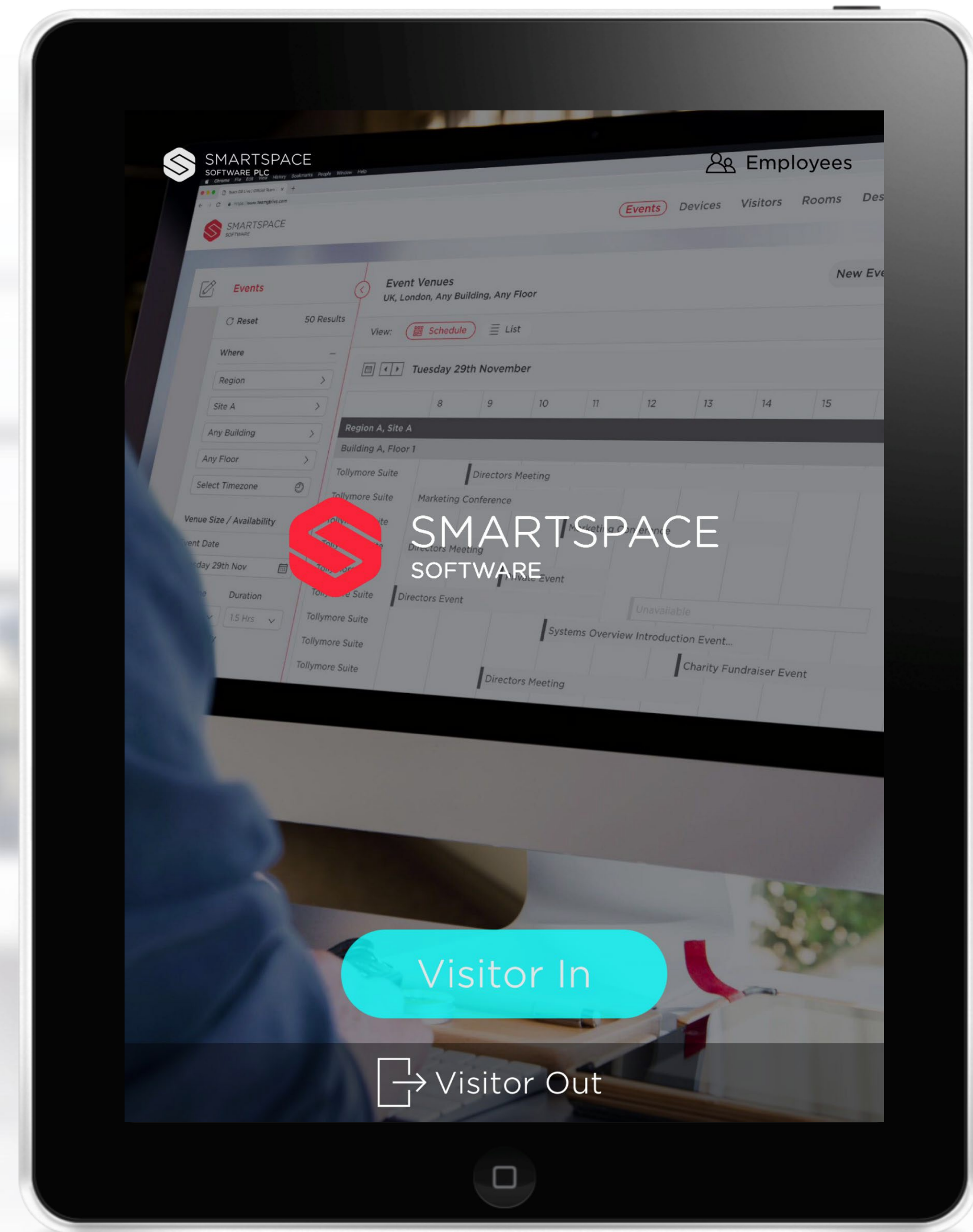


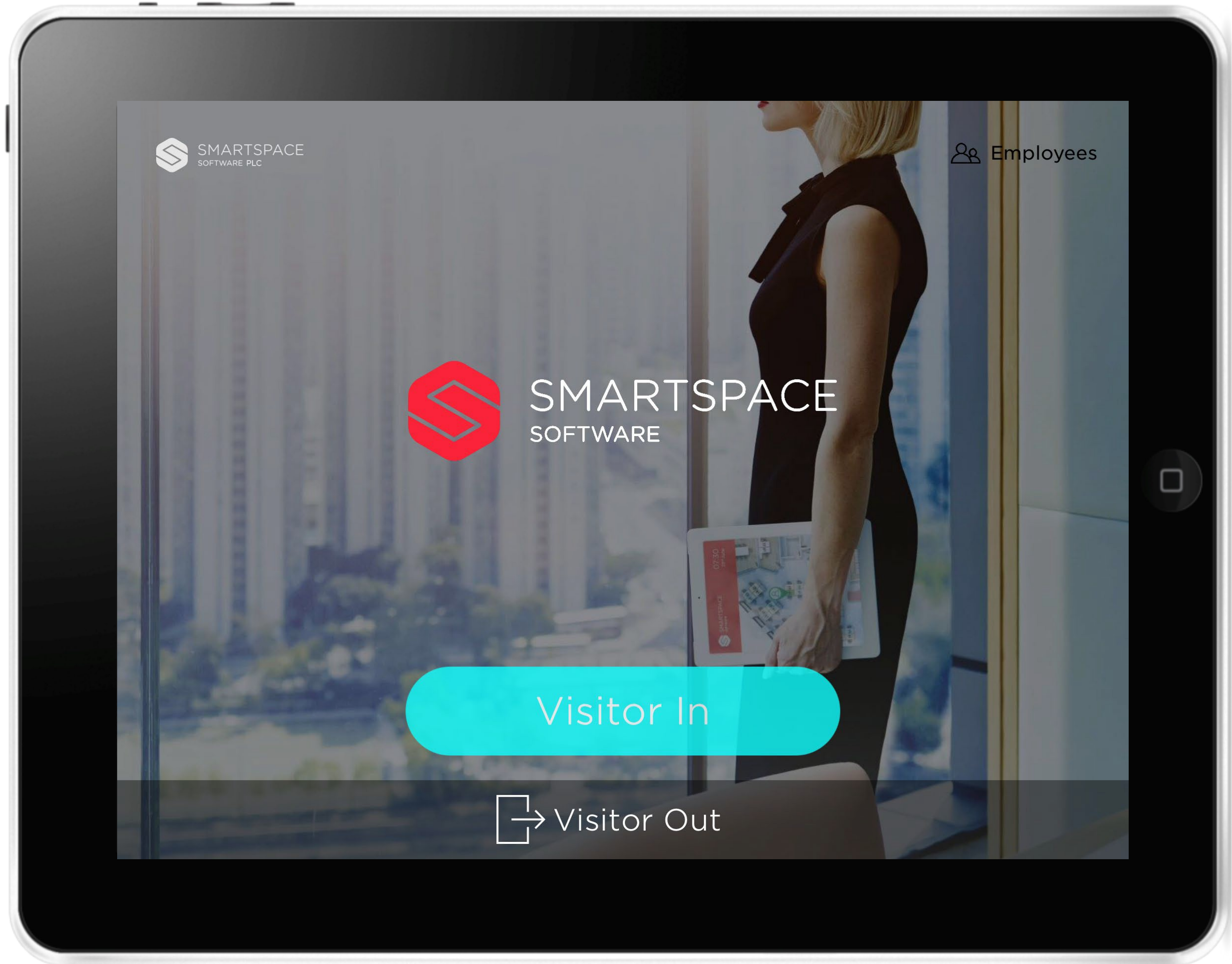
Confirm Sign Out

Tap the back arrow if the incorrect name has been selected.

Or Simply Tap 'Sign Out' to confirm.

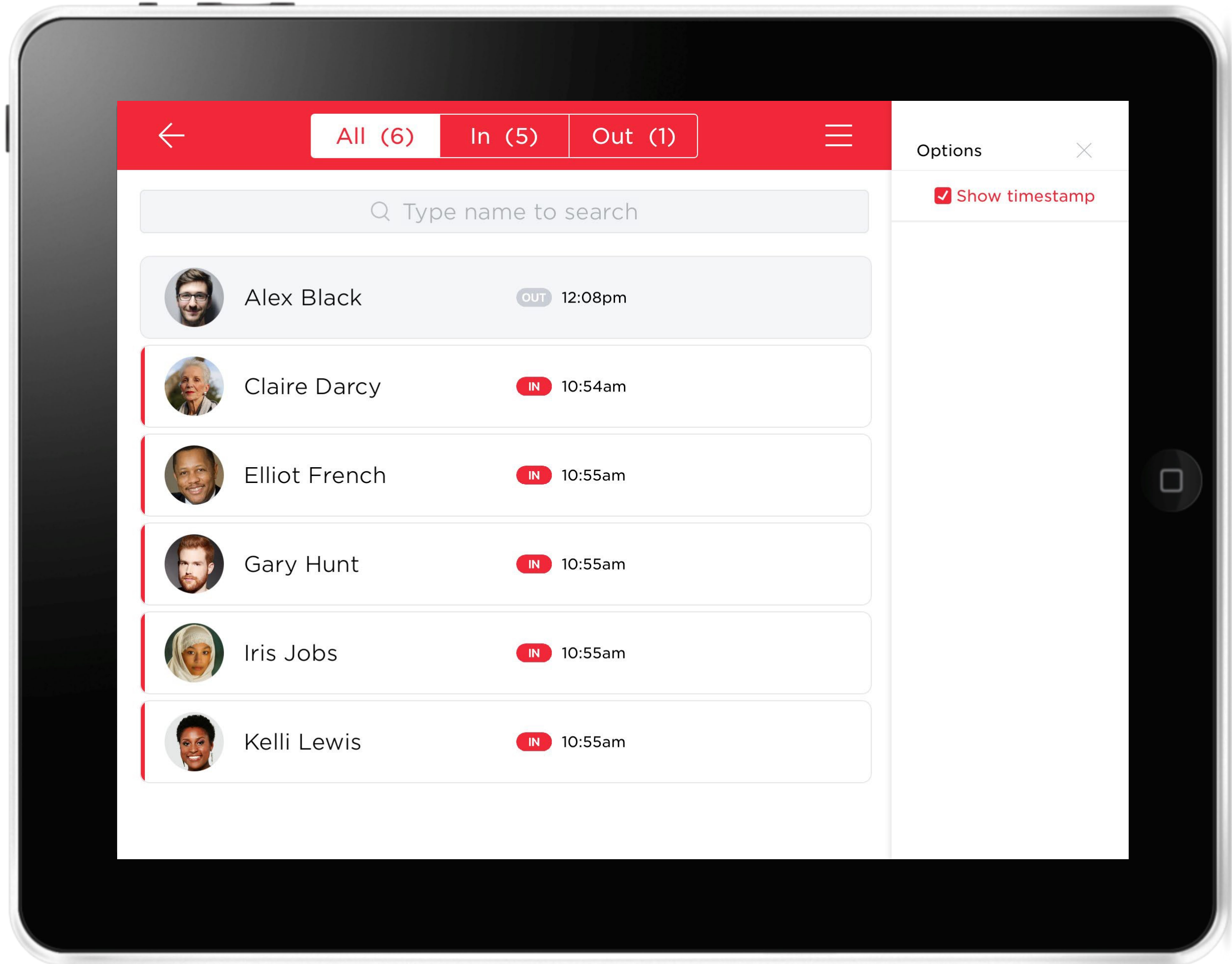
Employee User Interface





Sign In

Triple tap the 'Employees' Icon in the top right corner.

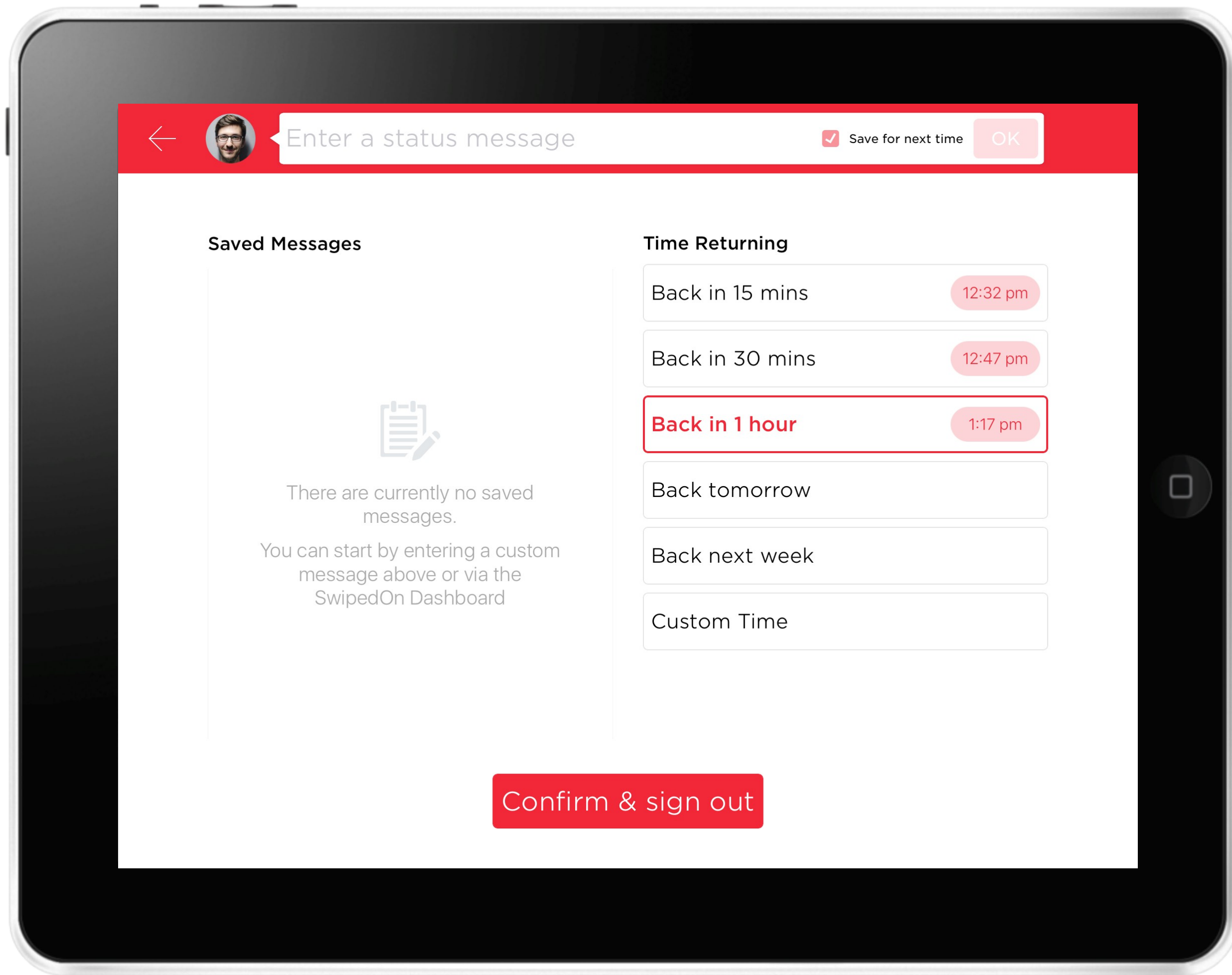


Sign In

Search for your name in the displayed list, or begin typing your name to filter the list.

Move the slider position to 'IN' to sign in.

Use the Menu icon in the top right corner to open 'Options' and enable or disable the timestamp.



Status Message

Tap on the Notepad and pen icon on the previous screen to add a status message. This message can be saved for future use.

You can also select your return time.

Tap 'Confirm and Sign out' to complete this action.

