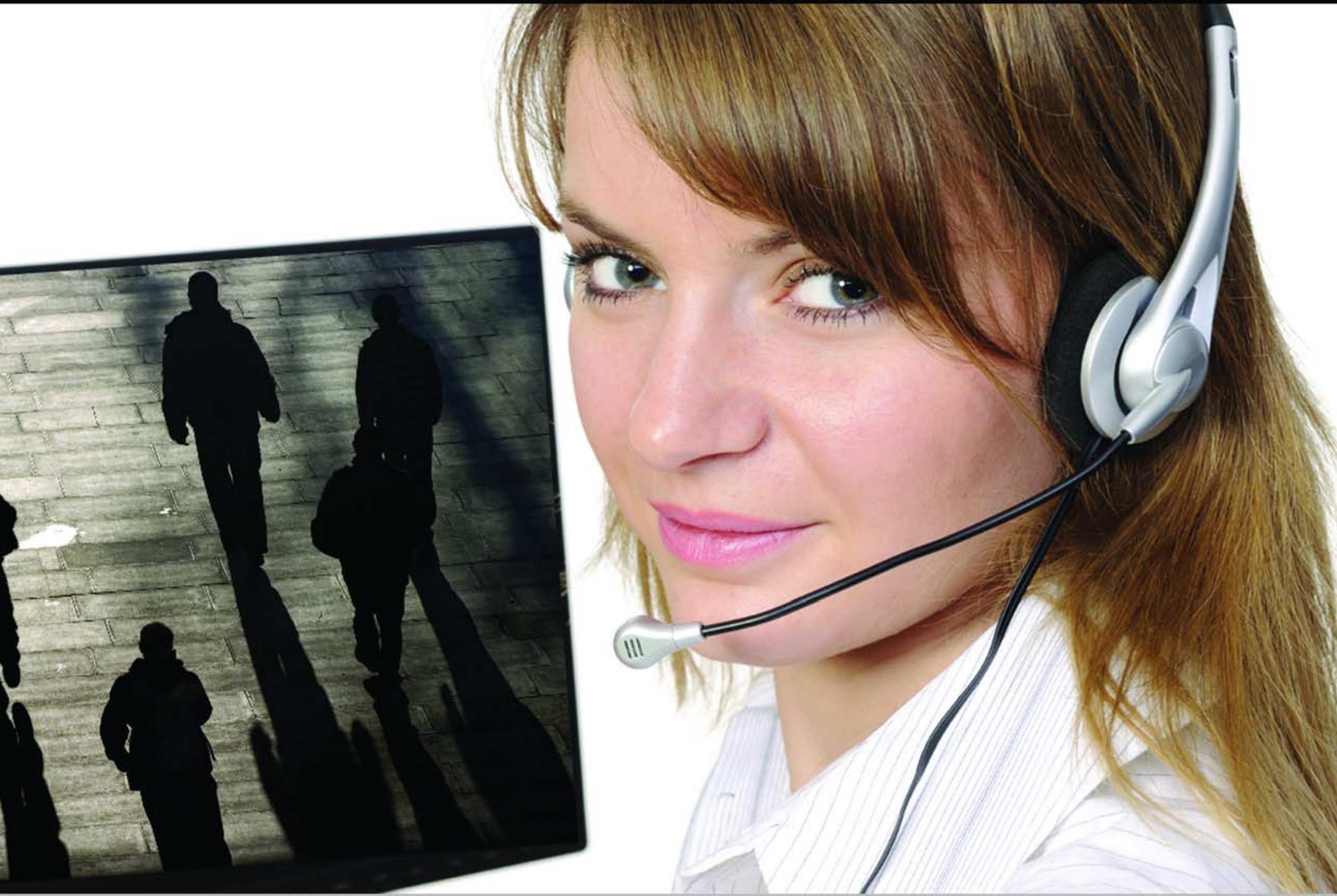
INTEGRATED SOFTWARE SOLUTIONS



Visitor Management Host User Guide

B.A.S.I.S. ET693™

STANLEY®
Security Solutions

PROTECTING WHAT'S IMPORTANT TO YOU™

Table of Contents

CHAPTER 1 *Introduction* *5*

Conventions Used in this Documentation 5

Prerequisites 6

Licensing *6*

Visitor Management Version Compatibility 6

CHAPTER 2 *Host Permissions* *7*

Host Permissions 7

CHAPTER 3 *Visitor Management Host* *11*

Browser Settings 11

Update the URL *12*

Editing FlexApplicationConfiguration.xml 12

Editing Services.config 12

Getting Started 13

Bulk User Tool *13*

Step 1: Link Cardholders with Directories 14

Step 2: Create Users and Link with Directories 14

Web Address *15*

Logging In. 15

Logging Out 15

User Interface 15

Controls *16*

User-defined Fields *16*

Visitor Lists *16*

Configuring the Visitor Labels 16

Viewing Event Details or Visitor Profile . . . 17
Host a Visit . . . 17
E-mail Notification . . . 17
Scheduling a Visit . . . 17
Adding a Visitor . . . 18
Modifying a Visit or Visitor . . . 18
Removing a Visit . . . 18
Search . . . 18
Searching for a Visitor . . . 18
Conducting an Advanced Search . . . 19
Reports . . . 19

CHAPTER 4 *Host Delegates . . . 21*

Host Account . . . 21
Designating a Delegate . . . 21
Visitor Management as a Delegate . . . 21
Permissions . . . 22
Viewing Schedules . . . 22
Scheduling a Visit for a Host . . . 22
Modifying a Visit . . . 22
Removing a Visit . . . 22

CHAPTER 1

Introduction

Visitor Management is for managing and tracking visitors within your organization.

The hosting party logs into a browser-based application to add a visitor or schedule a visit. The web application allows users to log into the visitor management system from any desktop.

The front desk attendant can search for visitors, sign visitors in or out, capture information, determine status, and have e-mail notifications sent to the host and visitor. Front desk attendants can also view upcoming visits.

Scheduled visitors use the Kiosk for self sign-in. When the visit is scheduled, a notification e-mail is sent to the host and visitor. The visitor's e-mail will contain a bar code which is the visit key. This is used to sign in or out for the scheduled visit.

Configuration of these applications is done with Visitor Administration. This is also a browser-based application. It is used to configure settings such as sign-in locations and kiosks.

Conventions Used in this Documentation

The text in this documentation is formatted to make it easy for you to identify what is being described.

- Where a term is defined, the word is represented in *italics*.
- Field names are shown in **bold**.
- Menus and menu choices are shown in ***bold italics***. All menu choices have accelerator keys, which enable you to select the menu choices using the keyboard. The underlined letter represents the accelerator key for that menu item. Accelerator keys are written, for example, <Alt>, <C>.
- Keyboard keys are represented in angle brackets. For example: <Tab>, <Ctrl>.
- Keyboard key combinations are written in two ways:

  <Ctrl> + <Z> means hold down the first key and press the second

  <Alt>, <C> means press the first key, then press the second
- Buttons on the screen are represented in square brackets; for example: [Modify], [Cancel].

Prerequisites

The Web Application Server is installed through a custom installation of the access control software. For more information, refer to the Installation Guide.

Other considerations:

- Your server must be a member of a domain. Workgroups are not supported.
- You should be logged into the computer as a domain user.
- Use the fully qualified name of the computer for the URL. This is important when typing the computer name in the configuration file.
- The LS Application Server service's "Log On" user should be a domain user.
- Be sure the LS Application Server service is running.
- Be sure that the user has access to B.A.S.I.S., permissions assigned, and linked to a directory account.
- When making changes, restart IIS when you are done.
- Sign-in locations should be configured in Visitor Administration before using Visitor Management Front Desk or Host.

Licensing

Visitor Management is a licensed module. To use these applications, the license must be set to a number greater than zero. The Visitor Management section of the license indicates the number of concurrent licenses being used and the number purchased. The maximum number of visits indicates the number of visits you are allowed to have stored in the system.

Note: For group visits, each invited visitor is counted as a single visit event. For example, if a group visit contains 10 visitors, this uses 10 visits of the license.

Visitor Management Version Compatibility

There are two options for Visitor Management.

- The existing Visitor Management application can be accessed through System Administration, ID CredentialCenter, or Visitor Management.
- The B.A.S.I.S. ET693 Visitor Management is comprised of the new smart client Front Desk application, the browser-based Host application, browser-based Administration application, and the Kiosk. Visits scheduled in System Administration, ID CredentialCenter, or Visitor Management can be viewed and modified in these other applications.

  However, when group visits are scheduled using the Front Desk or Host, they cannot be changed in System Administration, ID Credential Center, or Visitor Management. Group visits are not supported through these user interfaces.

  For visits scheduled in System Administration, ID CredentialCenter, or Visitor Management, the sign-in location does not exist. When these visits are seen in Visitor Management Host, this field will be blank. In Front Desk, these visits will only be seen when **All** is selected for the sign-in location, and will not show up in any other location selected.

  When an event has been created in System Administration, ID CredentialCenter, or Visitor Management, the notification e-mail does not have the scheduled time or visit key. Visit events should be scheduled in Visitor Management Host or Front Desk.

CHAPTER 2

Host Permissions

B.A.S.I.S. user permissions are enforced. These permissions are configured in System Administration or ID CredentialCenter in the Users folders. These permissions should be configured for the user to access components of Visitor Management.

A change in user permissions requires restarting IIS. Restarting IIS will allow the correct permissions to be applied.

The Users folder allows for granular control of the permissions assigned to users within each group.

Host Permissions

For users who will view their visit calendar in Visitor Management Host, schedule visit events, add and invite visitors, the following permissions should be configured.

System Permission Groups ● = Select the permission check box	Log in	Schedule new event	Modify event	Remove event	Add new visitor	Modify visitor	View photograph	E-mail notifications
Users, Directories, Certification Authorities, Logical Access tab								
Users	●	●	●	●	●	●	●	●
User directory accounts	●	●	●	●	●	●	●	●
Access Control tab								
Segments *	●	●	●	●	●	●	●	●
Global I/O tab								
Global I/O								●

* This permission only applies in a segmented system.

Cardholder Permission Groups ● = Select the permission check box	Log in	Schedule new event	Modify event	Remove event	Add new visitor	Modify visitor	View photograph	E-mail notifications
Cardholder tab								
Cardholder	●	●	●	●	●	●	●	●
Directory accounts	●	●	●	●	●	●	●	●
Visitor	●	●	●	●	●	●	●	●
Add					●			
Modify					●	●		
Segments *					●	●		
Visitor Management tab								
Visit	●	●	●	●	●	●	●	●
Add		●	●		●			
Modify		●	●					
Delete			●	●				
Sign-In Location		●	●	●				

* This permission only applies in a segmented system.

Field/Page Permission Groups ○ = View permission needed ● = Both View and Edit permissions needed	Log in	Schedule new event	Modify event	Remove event	Add new visitor	Modify visitor	View photograph	E-mail notifications
Cardholder								
Allowed Visitors	○	○	○	○	○	○	○	○
First Name	○	○	○	○	●	●	○	○
Last Name	○	○	○	○	●	●	○	○
Middle Name						●		
User-Defined Cardholder								
E-mail								○
Multimedia Objects								
Photo Field							○	
User-Defined Visitor								
[e-mail field]								○
Visit Event								
Scheduled Time In UTC		●	●	●				
Scheduled Time Out UTC		●	●	●				

- For fields pertaining to visitors or visits, including user-defined fields, View and/or Edit permissions should be granted if the host is expected to see the entries or modify them.

CHAPTER 3

Visitor Management Host

The browser-based host application is for adding visitors and scheduling visits. The web page can be accessed and used from any workstation within an organization. You must have proper credentials to log in and use this browser-based application.

For proper functionality, the Visitor Management Host requires:

- Internet Explorer 7 or later
- Flash Player 9 or later (available from http://www.adobe.com/support/flashplayer/downloads.html#fp10. If you are having difficulties, contact your administrator.)

Due to the default Internet Explorer enhanced security settings preventing the use of some browser components, Visitor Management Host is not supported on Windows Server 2003 or Windows Server 2008. The Internet Explorer security settings can be adjusted to provide support but it is not recommended due to potential insecure Internet Explorer security setting modifications.

Browser Settings

Visitor Management Host is currently supported with Internet Explorer. Certain browser controls must be enabled to display the functionality of Visitor Management Host. ActiveX controls and File download must be enabled.

In Internet Explorer, add the Visitor Management Host URL to the list of Trusted Sites on the Security tab of the Internet Options and set the security level for this zone to medium-low. JavaScript should be enabled for the browser. The following options must be configured in the custom security settings:

Item	Setting
ActiveX controls and plug-ins > Automatic prompting for ActiveX controls	Enable
Downloads > File Download	Enable
Miscellaneous > Access data sources across domains	Prompt

Item	Setting
Scripting > Active Scripting	Enable

To enhance Visitor Management Host performance, bypass the proxy server for local addresses and add the web server address to the list of proxy server exceptions.

Update the URL

The full name of the computer is usually configured during the installation process. However, if you wish to change it, this can be done in the **FlexApplicationConfiguration.xml** file. This is located in **C:\Inetpub\wwwroot\lnl.og.services\webhost**.

The full name of the computer can be found by right-clicking on **My Computer** and selecting ***Properties***. Then select the Computer Name tab. For cluster configurations, use the fully qualified virtual computer name.

SSL

If SSL (Secure Sockets Layer) is used, you must change the URL from `http` to `https`.

Editing FlexApplicationConfiguration.xml

1. Navigate to **C:\Inetpub\wwwroot\lnl.og.services\webhost** and edit the **FlexApplicationConfiguration.xml** file.
2. Locate the URL.
3. Change `http` to `https`.
4. Save the file.

Editing Services.config

For Visitor Management Host, the **services.config** file needs to be changed to use SSL. The **services.config** file is the default configuration, which is HTTP with Windows authentication. If you do not plan to use SSL, then you do not have to perform this procedure.

1. Navigate to **C:\Inetpub\wwwroot\lnl.og.services\IdvmWebHost**.
2. There are four possible security policies, with corresponding files:

Security policy	File
No transport security, Windows Authentication not required	HttpServices.config
Transport security, Windows Authentication not required	HttpsServices.config
Transport security, Windows Authentication required	HttpsWithWindowsAuthenticationServices.config
No transport security, Windows Authentication required	HttpWithWindowsAuthenticationServices.config

   a. To configure transport layer security and require Windows Authentication, locate the file, **HttpsWithWindowsAuthenticationServices.config**.
   b. Select the file name and rename it to `services.config`.
3. Edit the file. Locate the URL and change `http` to `https`.

4. Save the file.

Getting Started

Additional steps are necessary to configure B.A.S.I.S. for web application access. The user logging in must be a cardholder. This cardholder must be paired with a user.

To get started, create a directory in System Administration. Link the cardholder with the directory account. Link the user to that same directory account.

B.A.S.I.S. allows multiple cardholders to be linked to a user through different directory accounts. However, this is not supported for Visitor Management Host. A user should not be linked to the directory account of more than one cardholder.

Note: If segmentation is enabled, the cardholder and the user must be in the same segment. Lack of a common segment causes the inability to save visitors.

For more information, refer to the Installation Guide and System Administration User Guide.

Bulk User Tool

The Bulk User Tool is for adding and linking multiple users to their cardholder directory accounts so that they are allowed to then log into Visitor Management.

A log file for the Bulk User Tool is created in the B.A.S.I.S. log directory. The BulkUserTool.log file can be accessed to view more details on how the Bulk User Tool has been run.

Limitations

- The Bulk User Tool cannot run on a mobile station.
- If searching through several thousand cardholders, memory consumption may cause issues. It is recommended to process these tasks in batches of just one or two thousand at a time.
- All cardholders used for linking and user creation must have the **Allowed Visitors** option enabled. The **Allowed Visitors** option can be found in System Administration or ID CredentialCenter on Cardholders form, on the Visits sub-tab.
- If using an LDAP directory for linking cardholders in bulk, user name matches will not function properly.
- If using Active Directory for linking cardholders, the matching criteria must not contain mismatched parentheses or a single “*” character. An example of a valid search is: “(FRANK), FR*.” An invalid search is: “(FRANK, FR*.”

Permissions

To use the Bulk User Tool the following permissions must be enabled. They can be accessed in System Administration or ID CredentialCenter.

On the System Permission Groups form, Users, Directories, Certification Authorities, Logical Access sub-tab:

- **User directory accounts** and **Link/unlink**

- **Users** and **Add**, **Modify**, and **Delete**

Obtaining the Bulk User Tool

The Bulk User Tool will be installed on every system including custom installations. The Bulk User Tool is available from the Windows Start menu after installation.

Using the Bulk User Tool

Linking users to their cardholder directory accounts has two steps. First you must link the cardholder with a directory. You must then create a user account for that cardholder and link it with the same directory.

Step 1: Link Cardholders with Directories

1. Log into the Bulk User Tool using your B.A.S.I.S. credentials.
2. On the Bulk User Tool welcome window, select the **Link cardholders with directories** and click [Next].
3. From the **Directory** drop-down, choose the directory in which to link the cardholder(s).
4. Use the **Field**, **Condition**, and **Value** drop-down boxes to set the logic conditions that are used to search for existing cardholders. Click [Add].

   The logic search allows you to search a specific field that has a set condition with a certain value. For example, the field could be the cardholder’s “Department,” the condition could be set to “Contains,” and the value could be “Engineering.” This search would find any cardholders whose department is set to engineering.
5. The search conditions are added to the listing window. Click [Next].
6. Enter the cardholder search criteria to further narrow the search and click [Next]. The search will be limited to cardholders who can receive visitors.
7. The results window is displayed with all of the cardholders that meet the search criteria. Select the cardholder(s) that you wish to link to the directory account. Click [Finish]. For more information about cardholders, look at the details column in the listing window. The details listed will give you information for each cardholder such as, but not limited to, if the cardholder is already linked to an account.

Step 2: Create Users and Link with Directories

Note: If you are modifying an existing user, the permission groups and segments of that user will not be modified. Only the directory account(s) will be added.

1. On the Bulk User Tool welcome window, select **Create users and link with directories** and click [Next].
2. The Permission Groups window opens. Choose the appropriate permission settings for the new users.
3. Enter the cardholder search criteria to further narrow the search and click [Next].
4. If your system is segmented, select the segments in which to search and click [Next].
5. The results window is displayed. Select the user(s) that you wish to add and link to the cardholder directory account. Click [Finish]. For more information about cardholders, look at the details column in the listing window. The details listed will give you information for each cardholder such as, but not limited to, if the cardholder is already linked to an account.

Web Address

To get started, you will need the web address. The URL to access Visitor Management Host consists of the fully qualified server name and the location of the application on the server. The location of the application is different depending on the application used. There is not a central log in web site for all B.A.S.I.S. web-based applications. To connect to Visitor Management Host, type the following address into a browser, where *<server name>* is the location of the B.A.S.I.S. server:

- http://*<server name>*/IdvmHost/ (for logging in with automatic single sign-on)
- Or http://*<server name>*/idvmhost/?useAutomaticSSO=false (if manually logging in)

Logging In

1. Go to the host web page,
   http://*<server name>*/IdvmHost/
   To log in manually, go to
   http://*<server name>*/idvmhost/?useAutomaticSSO=false
   - If you have configured SSL for Visitor Management, remember that the URL for the server must start with https://...
   - If you wish to log in with the current Windows user, you may leave the username and password blank, and skip to step 4.
2. Type in your username.
3. Type in your password.
4. Select the Directory from the drop-down. You must use the Active Directory account to log in if it is linked to a cardholder account in the software.

Note: This login is designed to work with an Active Directory. If a Windows Local Accounts Directory has been configured, you will only be able to use single sign-on and must be physically using the server to access the web page.

5. Click [Login].

After logging in, the host's scheduled visits are displayed.

When the correct user name and password has been typed in and there is a failure to log in, check that the user account has access to the system. This is configured in System Administration or ID CredentialCenter on the General form of the Users folder.

Logging Out

1. On the web page, click **Logout**.

You will be logged out of the host application.

User Interface

The host's schedule is displayed, with the current day highlighted by default. Visits are shown on the day for which they are scheduled, along with the time and the visitor. For group visits (two or more visitors), the number of visitors is shown instead of the visitor's name.

When a visit is selected, the event details and visitor profile are displayed on the right-hand side of the window. If it is a group visit, the visitor profile can be viewed by selecting individuals on the “Invited Visitors” list. A group visit can have up to a maximum of 75 visitors invited.

Controls

To see visitors for the next day or previous day, use the arrow buttons to navigate back and forth between the days.

You may also use the calendar controls to navigate. Click [Today] to display scheduled visits for the current day. Click the calendar month icon to select a specific date, or use the links at the bottom to **Show next event** or **Show previous event**.

By default, the application refreshes once per minute. This setting can be configured in System Administration using the Cardholder Options Visits form.

User-defined Fields

This documentation refers to data fields that are shipped as the default. If you have used FormsDesigner to customize your data fields, the elements on the user interface will be different.

When customizing the user interface with FormsDesigner, the tab order will determine the way the fields are displayed. User-defined fields will be displayed top to bottom in the host application, based on that tab order.

After changes have been made to the Visitor Management Host using FormsDesigner, restart IIS and the LS Application Server, and reload the web page.

Visitor Lists

When a list of visitors is displayed (in the process of searching or inviting a visitor to a scheduled event), their names are presented in relevance to the search. To avoid any confusion, especially between individuals with the same name, the visitors are listed with additional labels which distinguish between them.

Configuring the Visitor Labels

1. Open the **FlexApplicationConfiguration.xml** file to edit. This is located in C:\Inetpub\wwwroot\lnl.og.webservice
2. Locate the line, `<visitorLabel1>Organization:</visitorLabel1>`.
3. In order to change the data being displayed to something other than the default, replace the current value in between the tags by typing in the name of the new data field (exactly as it appears in FormsDesigner). For example, if a field called “Company” is to be displayed, type it in between the tags so it appears as:

   `<visitorLabel1>Company</visitorLabel1>`
4. Repeat this procedure for the second label, `<visitorLabel2>Title:</visitorLabel2>`.
5. Save the file.
6. Restart IIS and the LS Application services. Reload the web page.

Viewing Event Details or Visitor Profile

1. Select a visit by clicking on it.
2. The event details and visitor profile are displayed on the right side of the window. You may switch the view by clicking on the tab.

Host a Visit

The web host application allows users to schedule visits and add visitors. A host may also view the schedule of visits.

Note: Group visits cannot be modified in System Administration or ID CredentialCenter; they are solely a feature of Visitor Management Host and Front Desk software version 6.3. Group visits are limited to a maximum of 75 visitors.

On a segmented system, if visitors are segmented, both the cardholder and visitor must be in the same segment to schedule a visit.

E-mail Notification

If e-mail is configured and enabled, the host and/or visitor will be able to receive notifications whenever a change is made to a visit. For more information about configuring this feature, refer to “Configure Visitor E-mail Fields” in the FormsDesigner User Guide, and “Configure Default E-mail Recipients” in the System Administration or ID CredentialCenter User Guide.

Scheduling a Visit

1. On the web page, click [New Event] to add a new visit event.
2. Type in the event name.
3. Enter the date and time.
4. Select the sign-in location for the visit. (The locations in this drop-down are configured in Visitor Administration.)
5. Select the visit type.
6. Type in the purpose of the visit.
7. Click [Invite Visitor]. A list will be displayed to choose the name of the visitor.
8. Select the visitor(s) to be added.
   - If needed, search for the visitor by typing in the name. Search results will be displayed from which you may choose the visitor.
   - You may also add a new visitor by clicking [New Visitor]. Refer to the procedure for Adding a Visitor.
9. Select the visitor and click [Add Selected Visitor(s)]. If you added a new visitor, click [Save Visitor and Invite].
   - Repeat this step to add more visitors for a group event (up to a maximum of 75 visitors). Or you may make multiple selections by holding the <Ctrl> key or <Shift> key and clicking. A group visit can have up to a maximum of 75 visitors invited.
   - To remove a visitor, select a visitor you have invited and click [–].
   - There must always be at least one invited visitor for a visit event.

10. Click [Save Changes]. If you do not want to save the visit, click [Cancel].

Note: Fields denoted with an exclamation point are required. You will only be able to save the information when the required fields are filled in.

Adding a Visitor

1. If searching for a visitor yields no results, you have the option to add a new visitor. Click [Add Visitor].
2. On the Visitor Profile tab, type the visitor's information.
3. Click [Save Changes]. If you do not want to save the information, click [Cancel].

Note: Fields denoted with an exclamation point are required. You will only be able to save the information when the required fields are filled in.

Modifying a Visit or Visitor

1. Select the visit by clicking on it.
2. Make changes to the event details or visitor profile.
3. Click [Save Changes]. If you do not want to save the information, click [Cancel].

Removing a Visit

1. Select the visit by clicking on it.
2. From the Event Actions pull-down menu, select **Remove event**.
3. When prompted for a confirmation for deleting the visit, click [Yes].

When a large group event is deleted, notification e-mails are sent for the participants. This may require some extended wait time while the system performs this function.

Search

A search field is used to conduct a simple search of visitors based on their last name.

Searching for a Visitor

When entering the criteria, keep in mind that only the first word or name will be used for searching. The entry of additional words will be ignored.

1. In the text field, type the name of the visitor. You may use partial names.
2. Click [Search]. The search results will be displayed, listing the individuals whose names match the criteria entered.
3. If the search does not produce any results, an icon will appear, allowing you to add the new visitor. To do so, click [Add Visitor].
4. If you wish to cancel the search after you have started typing the name, click the X that appears in the same text field.

Note: After a search has been performed and the results are returned, clicking the search button has no effect. This is to minimize network traffic. The search must be cleared and criteria must be entered to conduct a second search, even if it is the same exact search.

Conducting an Advanced Search

The advanced search allows for more control over the search criteria. It allows you to search other fields and use operators.

1. To use advanced search, click the arrow button and select **Advanced Search**. The filter options are displayed.
2. Enter the search criteria.
   a. To search for visit events that have been scheduled, click **Events**. To search for visitors in the system, click **Visitors**.
   b. Use the drop-down to select the field to search.
   c. Type the search criteria in the text field.
   d. Repeat this step to add more criteria to be used in conjunction with what you have entered.

Note: When searching multiple fields, the search criteria for each field is combined, as indicated by "And" next to the drop-down lists. This narrows the search and retrieves results meeting all of the criteria. When two or more of the same search criteria are selected in advanced search, only the last entry will apply to the search

3. Click [Search]. The search results will be displayed.
4. After you are done searching, you may exit the Advanced Search by clicking the arrow button and selecting **Cancel Search**. If you would like to conduct another search, select **Clear Criteria**. If you would like to revert back to simply searching by last name, select **Quick Search**.

Reports

Reports can be generated for defined search criteria or all visits; however, this can only be done in the Visits folder in System Administration or ID CredentialCenter. For more information, refer to "Run a Visit Report from the Visits Folder" in the System Administration or ID CredentialCenter User Guide.

CHAPTER 4

Host Delegates

A delegate is an individual who can manage visits for a host. Delegates may have the ability to schedule, edit, or delete visits for a host. A user of the system may be both a host and a delegate.

Note: In a segmented system, the host and the delegate must be in the same segment. If they are on different segments, visits may appear to be missing from one or both calendars.

Host Account

In the host application, details about the host can be viewed by clicking [My Account].

Designating a Delegate

1. While viewing your account, click **Delegates**. If you already have delegates, they will be displayed in the list.
2. To designate a delegate,
   a. Click [+].
   b. Select a delegate from the list.
   c. Click [OK].

   The delegate's name will appear on your list.
3. To remove a delegate,
   a. Select the name from the list.
   b. Click the pull-down menu and choose **Remove**.

   The delegate's name will be removed from your list.
4. Click [Close] to exit My Account.

Visitor Management as a Delegate

Delegates can manage visits by going to the web page and Logging In.

Permissions

The actions that can be performed by delegates are based on the B.A.S.I.S. configuration of their user permissions. These permissions can be configured in System Administration or ID CredentialCenter in the Users folder.

For example, if a delegate is logging in with a user account that has permission to modify a visit, the same permission would apply for the delegate's own calendar as well as the host's calendar.

Viewing Schedules

Once logged in, the delegate's calendar of visits is displayed. This distinction is made at the top of the window, where it says **Calendar: Myself**. To change this view, you may choose a different host.

1. Click [...]. A list of hosts will be presented. Host names will only appear on this list if you have been designated as their delegate.
2. Choose a host name from the list. Once another host is chosen, their calendar will be displayed.
3. To return to your own calendar, click [X].

Scheduling a Visit for a Host

1. Select the calendar of the host.
2. Enter the information for the visit event.
3. Click [Save Changes]. If you do not want to save the information, click [Cancel].

Modifying a Visit

1. Select the host's visit by clicking on it.
2. Make changes to the event details.
3. Click [Save Changes]. If you do not want to save the information, click [Cancel].

Removing a Visit

1. Select the host's visit by clicking on it.
2. From the Event Actions pull-down menu, select **Remove event**.
3. When prompted for a confirmation for deleting the visit, click [Yes].

Index

A

Add visitors 18

B

Browser settings 11
Bulk user tool
  overview 13
  permissions 13

C

Controls 16

D

Delegate
  modify visit 22
  remove visit 22
  schedule visit 22
  view schedules 22
  visitor management 21
Designate delegate 21

G

Getting started 13

H

Host a visit 17
Host delegates 21
Https 12

I

Introduction 5

L

Licensing 6
Log in 15
Log out 15

M

Modify
  visit 18
  visitors 18
My account 21

P

Permissions
  bulk user tool 13
Prerequisites 6

R

Remove visits 18

S

Schedule visits 17
Search for visitors 18
SSL 12

U

UDFs 16
URL 12, 15
User interface 15
User-defined fields 16

V

Version compatibility 6
View
  event details 17

visitor profile 17
Visit 17
Visitor labels 16
Visitor lists 16
Visitor management
add visitors 18
controls 16
lists 16
log in 15
modify 18
remove visits 18
schedule visits 17
search 18
user interface 15
user-defined fields 16
view event details 17
view visitor profile 17

W

Web address 15

STANLEY
Security Solutions
6161 East 75th Street
Indianapolis, IN 46250
Phone: (317) 849-2250

B.A.S.I.S. ET693 Visitor Management Host User Guide, product version 6.5
Item number E882, revision 2.004, January 2013