iVisitor
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Employee User's Guide

INTRODUCTION

The instructions and information contained in this document outline the steps necessary to use iVisitor. This guide is designed to help facilitate the use of iVisitor. It is recommended that you read this guide prior to using the service.

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

- View Scheduled, Current & Past Visits
- Schedule (Add) Visits
- Import a List of Names into *i*Visitor
- Edit / Delete Scheduled Visits
- Access the My Profile page

Each function and steps for completion are defined in this guide.

USER FUNCTIONS

GETTING STARTED

The first screen accessible through the iVisitor link is the **LOG-IN** screen (Figure 1).

Log in to iVisitor using an authorized Employee user name and password. (This will be supplied to you by your Administrator) If you forgot your user name and password, click the "*Forgot User Name or Password*" link to have it emailed to you.

Figure 1

Upon log in, iVisitor recognizes the user's USER TYPE and the applicable page is displayed.

The example shown below (Figure 2) shows the **MY VISITORS** page, standard for Employee Users. This is the "home page" for Employees to use to view, schedule, and edit visitors.

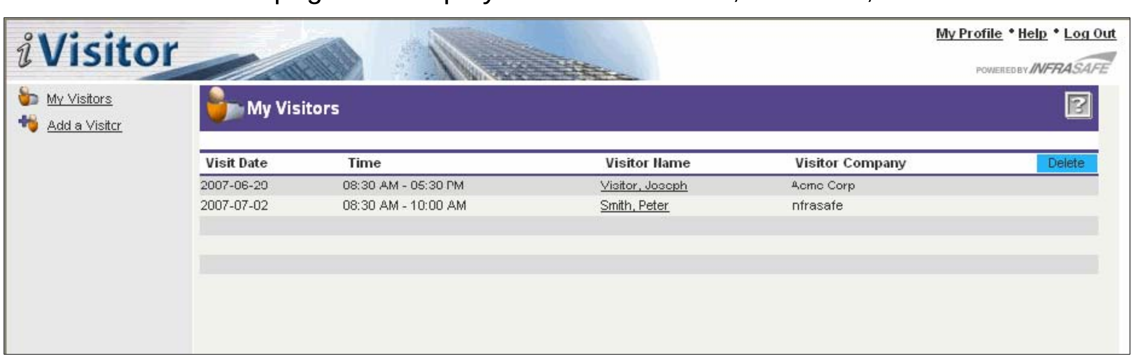
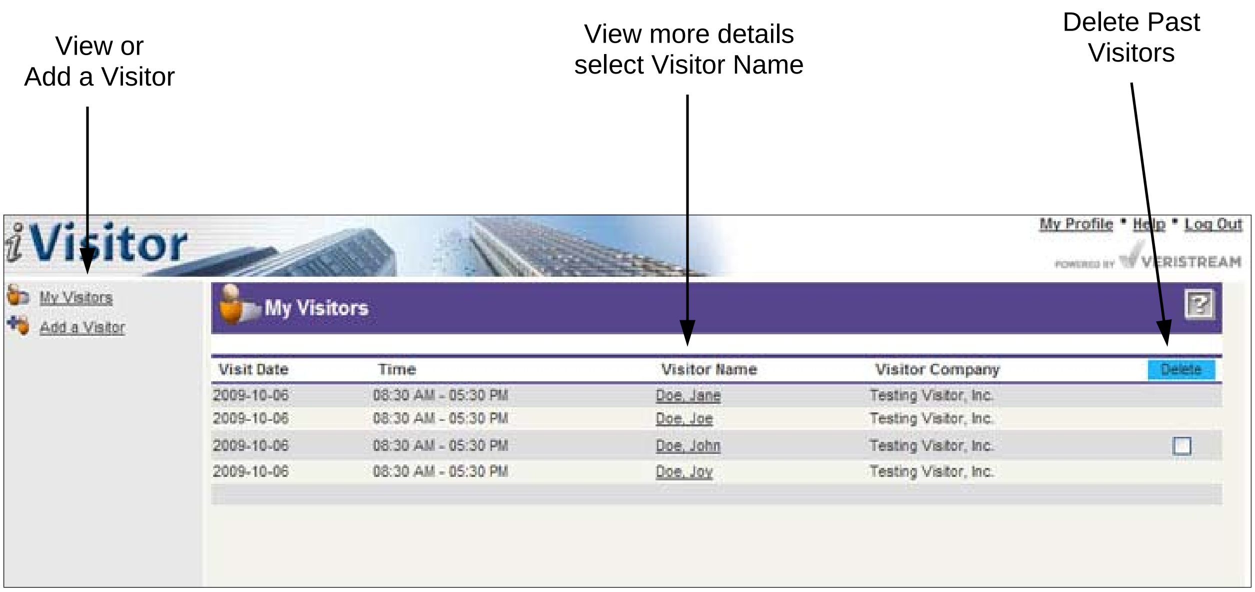


Figure 2

VIEWING SCHEDULED, CURRENT and PAST VISITORS

Clicking on the “*My Visitors*” link will display your personal **MY VISITORS** page. This page allows you to view your scheduled, current and past visitors. If you have the authority to schedule visitors for others, those visitors will appear on this page as well.



NOTE: Each column header provides you the ability to sort the visitor list by clicking on the header. You can sort visitors by Visit Date, Visitor Name, or Visitor Company.

NOTE: Once a Visitor has been checked out, you can select the check box in the “Delete” column and then click on the blue “Delete” button to remove them from your page.

ADDING A VISITOR

Clicking the "*Add A Visitor*" link from the Employee's **MY VISITORS** page, provides the ability to pre-enroll visitors for yourself or for others in your organization. After clicking "*Add a Visitor*," the **VISIT INFORMATION** page will be displayed (Figure 3).

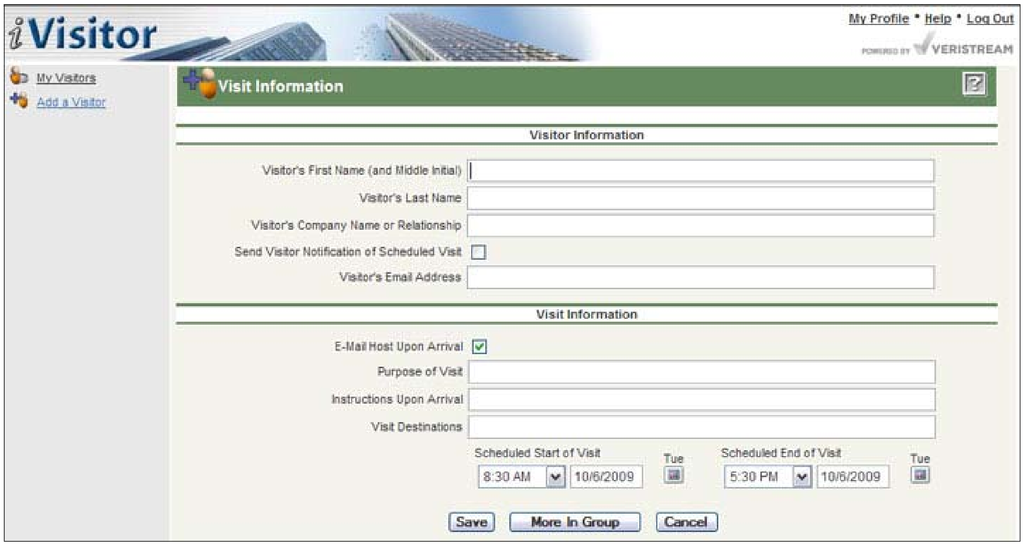


Figure 3

1. Complete the "*Visitor Information*" portion of the form by entering the visitor's first and last name, and company name or relationship.

   A. Indicate whether or not you want to send your visitor(s) a confirmation email of the scheduled visit and enter their email address.

2. Complete the "*Visit Information*" portion of the form:

   A. Indicate whether or not the host receives an email notification upon the visitor's arrival.

   B. Enter the Purpose of the Visit (i.e. Sales Demonstration).

   C. Enter Arrival Instructions if needed

   D. Enter the Visit Destination (i.e. classroom name).

   E. Use the calendar icon and select the start time and date, and end time and date of the visit.

If there are more visitors to be added, click the "*More in Group*" button (instructions follow), otherwise, click "*Save*."

ADD A VISITOR - MORE IN GROUP

If you are scheduling more than one visitor for the same date and time and purpose, click on the "*More in Group*" button located at the bottom of the screen. This will display the **MORE IN GROUP** page (Figure 4).

Enter the First Name, Last Name, Company Name or Relationship, for each visitor in the group or click "*Browse*" to upload a .csv file.

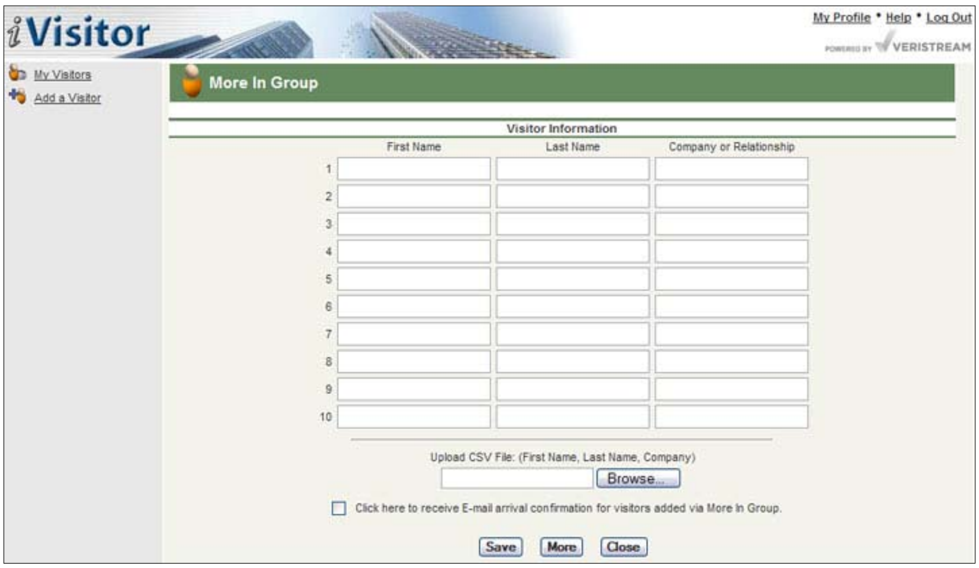


Figure 4

Excel (.csv) File Instructions

The Excel (.csv) file must follow these guidelines (Figure 5)

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

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

Figure 5

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

EDITING / DELETING VISITOR INFORMATION

Employees have the ability to Edit or Delete Visitor information for only the Visitors they have scheduled and for Visitors who are not currently checked-in.

From the **MY VISITORS** page (Figure 6), click on the name of the visitor for whom you wish to Edit or Delete. The **VISITOR INFORMATION** page will be displayed (Figure 7).

Figure 6

From **VISITOR INFORMATION** page, the Employee can change the visit information, or Delete the visitor if, for example, the meeting has been canceled or postponed.

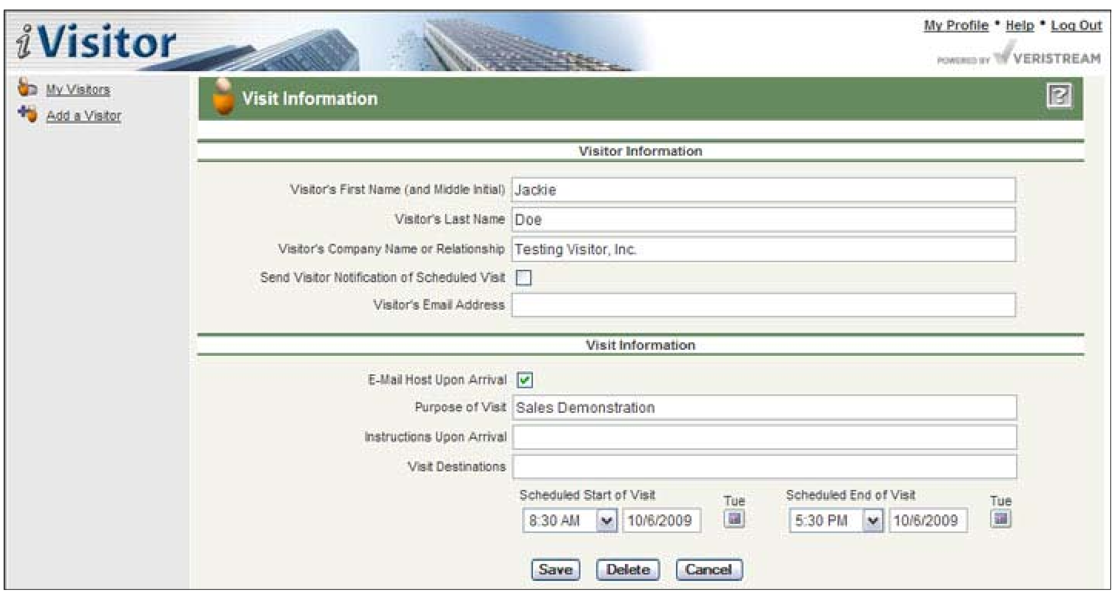


Figure 7

NOTE: If changing Visit Information (time, date, name of visitor, etc.), be sure to click on "Save" to save the changes. Clicking on "Cancel" will close the window without saving.

MY PROFILE

The **MY PROFILE** page allows the User to change their iVisitor login password. Additionally, this page allows Users to update their telephone / contact information.

Click the "*My Profile*" link to access the **MY PROFILE** page (Figure 8). When you are done making the appropriate changes, click on "*Save*" to save the changes. Clicking "*Cancel*" will exit without saving. If you changed your password, be sure to use the new password the next time you log into iVisitor.

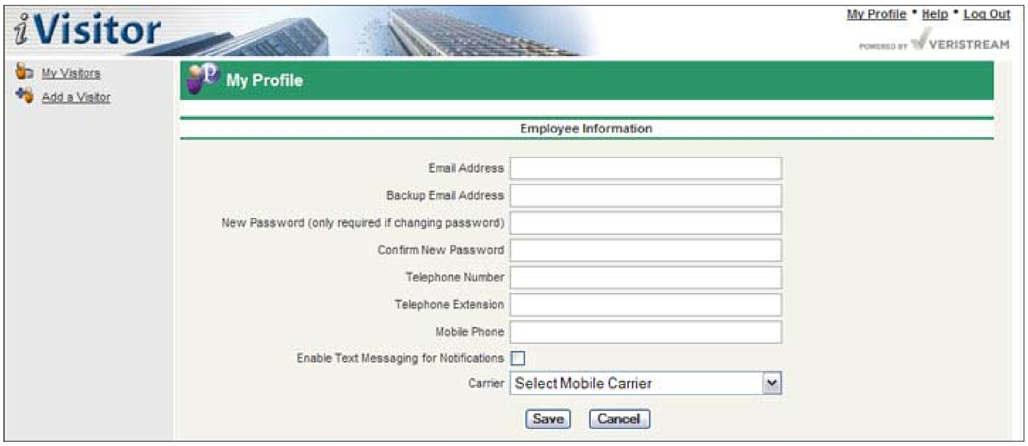


Figure 8

HELP

Clicking on the *"Help"* link, displays a contact form to submit your question to iVisitor support (Figure 9).

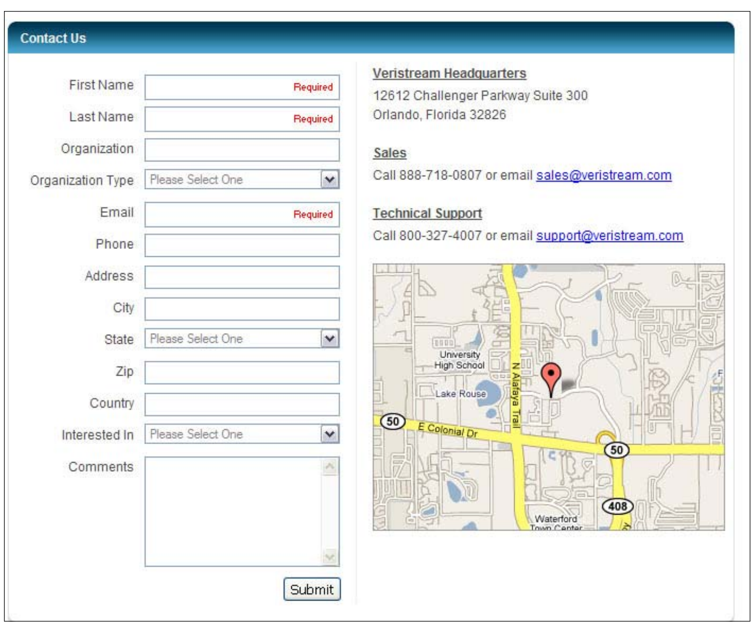


Figure 9