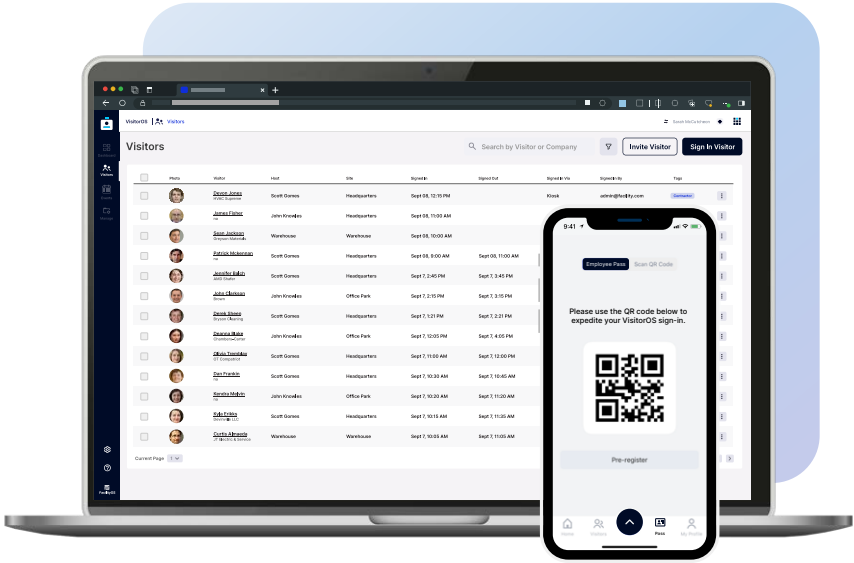




Kiosk Backend, Portal and Configuration Overview

onboard@facilityos.com





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Tooltip:

The VisitorOS module enables you to keep track of everyone coming in and out of your facility.

Overview

This guide will walk you through how to configure your VisitorOS system to function in a way that works seamlessly with your facility. The VisitorOS portal also acts as a cloud-based server that saves all of your visitor information and keeps it all at your fingertips.

To get started, log in to FacilityOS here: portal.facilityos.com.

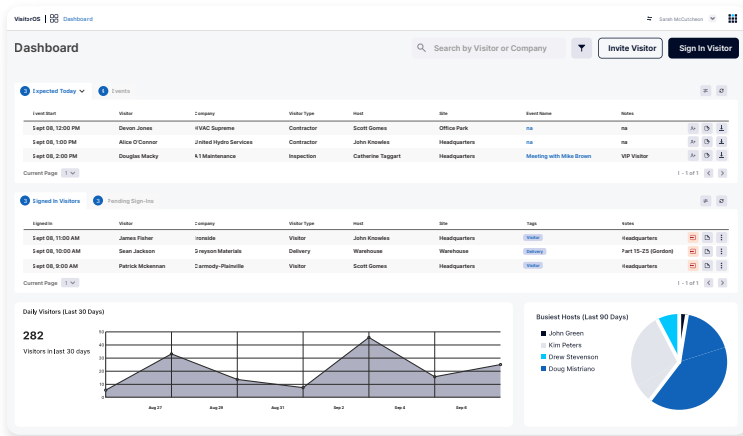


You must create an account in order for you to log in; navigate to the **"Sign In Help"** button and follow the steps provided. **Please note: your team must have already added your email in their address book or user records prior to creating your account.**

Once you have created your account, you may login. Depending on your permissions, you will have access to a multitude of different features within the portal.

Dashboard

The “**Dashboard**” is the heart of VisitorOS and it’s the first place you will land upon signing in to the module. Here, you can see everything going on at your site today, the last 30 days in terms of your visitors, and the last 90 days for hosts in your address book.



Certain individuals will be able to sign in visitors via the dashboard, which comes down to their permission level.



To sign in a visitor, navigate to the large blue button on the right side of the screen that says “**Sign-In Visitor**”. This will allow you to sign in a visitor, or sign in yourself if you and your team are using Employee Passes.

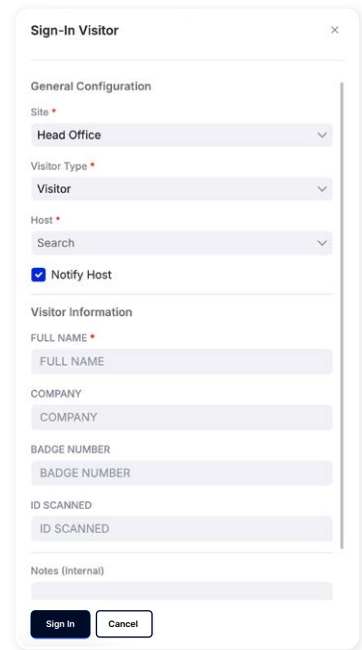


Tooltip:

Your organization must add the users email in the address book or user records first in order to be able to create an account.

Click the action you would like to perform and follow the prompts. **Please be sure to fill in all information with an asterisk beside it. This means that this information is REQUIRED to complete an invite or sign-in.**

Once an individual has been signed in, there are multiple things that you can do with their visitor record. When you see them displayed in the **“Signed-in Visitors”** section of the dashboard, click the 3 dots on the far right side of the listing.



Sign-in Visitor

General Configuration

Site *
Head Office

Visitor Type *
Visitor

Host *
Search

Notify Host

Visitor Information

FULL NAME *
FULL NAME

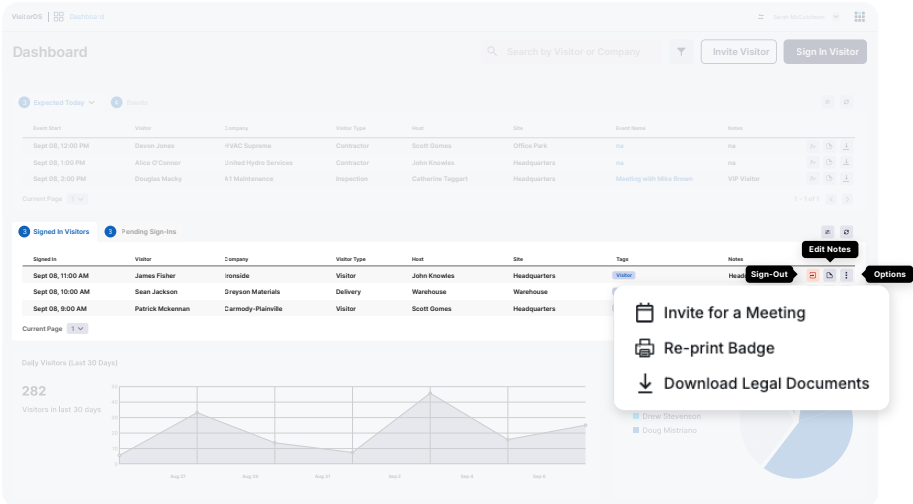
COMPANY
COMPANY

BADGE NUMBER
BADGE NUMBER

ID SCANNED
ID SCANNED

Notes (Internal)

Sign In Cancel



VisitorOS | Dashboard

Dashboard

Search by Visitor or Company

Invite Visitor Sign In Visitor

Expected Today 0 Visitors

Event Start	Visitor	Company	Visitor Type	Host	Site	Event Name	Notes
Sept 08, 12:00 PM	Devon James	FMAC Supreme	Contractor	Scott Gomes	Office Park	na	na
Sept 08, 1:00 PM	Alice O'Carroll	United Hydris Services	Contractor	John Knowles	Headquarters	na	na
Sept 08, 2:00 PM	Douglas Macky	K1 Maintenance	Inspection	Catherine Taggart	Headquarters	Meeting with Mike Brown	VP Visitor

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Signed In Visitors 3 Pending Sign-Ins

Signed In	Visitor	Company	Visitor Type	Host	Site	Tags	Notes
Sept 08, 11:00 AM	James Fisher	Inside	Visitor	John Knowles	Headquarters	Visitor	Head Sign-Out
Sept 08, 10:00 AM	Sean Jackson	Dreyson Materials	Delivery	Warehouse	Warehouse		
Sept 08, 9:00 AM	Patrick McKenna	Carrody-Plainville	Visitor	Scott Gomes	Headquarters		

Current Page 1 / 1

Daily Visitors (Last 30 Days)

282

Visitors in last 30 days

Sept 07 Sept 08 Sept 09 Sept 10 Sept 11 Sept 12

Invite for a Meeting
Re-print Badge
Download Legal Documents

Blue Stronstone
Doug Midstone

Edit Notes
Options

Depending on your enabled features, you will be able to invite them for a future meeting, re-print a visitor badge, add to a watchlist, sign out, edit visitor details, or download legal documents. Now, let's navigate over to the **“Visitors”** tab.

Visitors

The Visitors tab is an overview of everyone that has been at your site since it was created. This information is managed by you and cannot be deleted unless specifically requested.

The screenshot displays the 'Visitors' tab in the VisitorOS interface. At the top, there is a search bar labeled 'Search by Visitor or Company' and two buttons: 'Invite Visitor' and 'Sign In Visitor'. Below the search bar is a table with the following columns: 'Photo', 'Visitor', 'Host', 'Site', 'Signed In', 'Signed Out', and 'Tags'. The table lists several visitors, including David Jones, James Fisher, Sean Jackson, Patrick McManus, Jennifer Smith, John Clarkson, Derek Sloan, Duncan Stone, and Olivia Tomblin. Each row includes a 'Contractor' or 'Visitor' tag and a 'View' button.

Overlaid on the bottom left is a 'Filter' dialog box. It contains the following sections:

- Site:** A dropdown menu currently set to 'Head Office'.
- Sign-in:** Two date pickers labeled 'Start' and 'End'.
- Visitor Type:** A dropdown menu currently set to '-Please select-'. Below it is a list of options: Visitor, Contractor, Delivery, Auditor, Parent, Supplier, Vendor, and Tag.
- Notes:** A text input field labeled 'Notes'.
- Custom Field:** A dropdown menu currently set to '-Please select-'.

At the bottom of the filter dialog are three buttons: 'Apply Filter', 'Save Filter', and 'Reset to Default'.

To find a specific visitor, use the search bar at the top right of the screen– please enter any keywords that apply to the visitor you are searching for (such as their name or email.).

The “**filter**” tool allows you to search for visitors using a multitude of options. Once the desired filters have been added, click “**Apply Filter**” and all visitors that apply to those parameters will be visible.

To select the visitors, click on the check boxes to select them 1 by 1 or all at once. Once this has been done, you'll have a few options for what to do with the records. Click **“Bulk Actions”** on the top left side of the screen and you can export the visitor logs into a .CSV file to access the list easily.

The screenshot displays the 'Visitors' tab in the VisitorOS application. At the top, there is a search bar labeled 'Search by Visitor or Company' and two buttons: 'Invite Visitor' and 'Sign In Visitor'. Below this is a table with columns for 'Photo', 'Visitor', 'Host', 'Site', 'Signed in', 'Signed out', and 'Tags'. The table contains several rows of visitor data, each with a checkmark in the first column. A 'Bulk Actions' dropdown menu is open over the table, showing the following options: 'Show Selected Records Only' (with a checkbox), 'Export Selected to CSV' (with a download icon), 'Download Legal Documents for Selected' (with a download icon), and 'Delete Selected' (with a trash icon). The bottom right corner of the table shows '1 - 13 of 282'.

You can also download all legal documents pertaining to these visitor sign ins (NDAs, covid screening, or any other documents that have been made applicable to these visitors). Or if you wish, you can delete the selected entries entirely.

This concludes the **“Visitors”** tab. Next, let's continue by navigating to the **“Events”** tab.



Tooltip:

Certain actions are dependant on what permissions are granted by the account admin.

Events

In the “Events” tab, you will have the same search abilities as the “Visitors” tab.

Event Name	Start Date	End Date	Host	Site	Attended	Invited
Meeting with Mike Brown	Sep 8, 2024, 10:00 PM		White Brown Contract List	Headquarters	2	2
Contractor Visit	Sep 8, 2024, 11:00 AM		Scott Gates	Headquarters	3	4
Inspection	Sep 7, 2024, 1:00 PM	Sep 7, 2024, 4:00 PM	Tom Meakin	2Plex Park	2	2
Meeting with John Knowles	Sep 6, 2024, 10:40 PM	Sep 6, 2024, 2:30 PM	John Knowles	Headquarters	3	3
Inspection	Sep 6, 2024, 9:00 AM	Sep 6, 2024, 11:00 AM	Scott Gates	2Plex Park	3	1
Expedited Delivery	Sep 5, 2024, 2:00 PM	na	White Brown Contract List	HeadOffice	1	1
Staff Feedback	Sep 5, 2024, 2:00 PM	Sep 5, 2024, 6:00 PM	White Brown Contract List	2Plex Park	37	76
Meeting with John Knowles	Sep 5, 2024, 10:00 AM	na				
Inspection	Sep 2, 2024, 1:00 PM	Sep 3, 2024, 2:00 PM				
Meeting with Tom Meakin	Sep 1, 2024, 1:00 PM	na				
Meeting with Mike Brown	Sep 1, 2024, 10:00 AM	na				
Contractor Visit	Sep 1, 2024, 9:30 AM	Sep 1, 2024, 10:30 AM				
Inspection	Aug 31, 2024, 3:00 PM	Aug 31, 2024, 4:00 PM				
Meeting with John Knowles	Aug 31, 2024, 1:00 PM	na				
Contractor Visit	Aug 28, 2024, 3:00 PM	Aug 28, 2024, 4:30 PM				
Expedited Delivery	Aug 27, 2024, 1:00 PM	na				
Meeting with John Knowles	Aug 25, 2024, 11:00 AM	Aug 25, 2024, 12:30 PM				
Inspection	Aug 25, 2024, 9:00 AM	Aug 25, 2024, 11:00 AM				
Contractor Visit	Aug 24, 2024, 2:00 PM	Aug 24, 2024, 4:00 PM				

Additionally, the “Events” tab is where you can invite multiple people to your site at once, unlike the “Dashboard” or “Visitors” tabs where invites are based on one visitor at a time.

Search by Visitor or Contact name [Refresh] [Filter] [Download] [Invite Visitor] [Add New Event]

To invite multiple people to your site at once, you must first create an event. To create an event, navigate to the blue button on the side of the screen that says “New” and then “New Event”. Here, you will need to fill out every data field with an asterisk beside it.

Once the details have been specified for your event, click the blue **“save”** button at the top of the page, and save the event. Then, navigate back to the **“Events”** page and your new event will be displayed at the top of the list.

Click on your new event and here you can invite people either one by one or all at once by clicking the **“invite”** button and typing their information manually or importing a list of guests via .CSV file.

The image shows two screenshots from a web application. The top screenshot is a form for creating an event. It includes fields for Event Name, Site, Host, Visitor Type, Start Time, End Time, and options for All Day Event, Multi-Day or Recurring Event, Allow Early Sign-in, and Instructions for Guest. There are also checkboxes for 'Send Summary Report' and 'Suppress Sign-in Notifications'. The bottom screenshot shows the 'Event Guests' table with columns for Guest, Email, Pre-Registration Status, and an 'Invite Guest' button. A blue box highlights the 'Invite Guest' button.

Guest	Email	Pre-Registration Status
Jane Doe	janedoe@demo.com	Incomplete

We’re all done with the **“Events”** tab. Let’s navigate to the **“Manage”** icon to find the menu with our next destination: the **“Address Book”**. Click on the menu item to view.

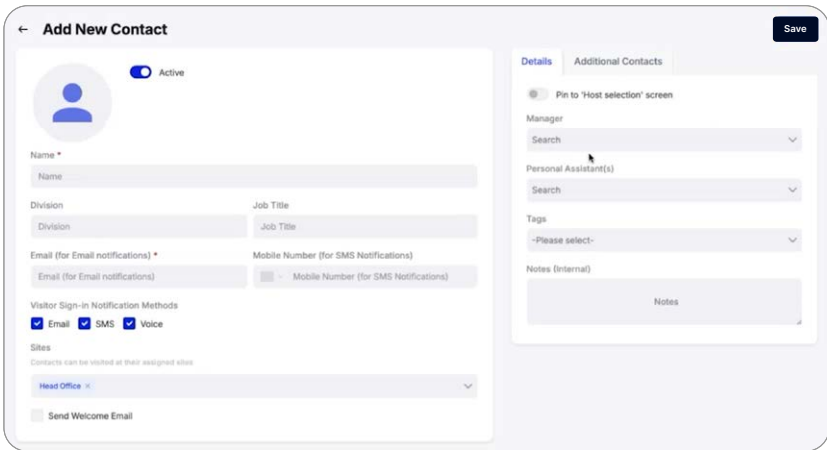
Address Book

The **“Address Book”** contains a list of hosts that visitors can choose to visit on sign-in at the VisitorOS kiosk.

The image shows the 'Address Book' interface. It has a search bar, a '+ New Contact' button, and a table of hosts. The table has columns for Name, Email, Phone, Site, Tags, and Notes. The data is as follows:

Name	Email	Phone	Site	Tags	Notes
Scott Gomes	scottg@facility.com	555-888-1234 x123	Head Office Warehouse	admin	
Warehouse	warehouse@facility.com	555-888-1234 x456	Head Office	warehouse admin	All Warehouse
John Knowles	johnk@facility.com	555-888-1234 x789	Head Office Office Park	admin	
Ted Melvin	tedm@facility.com	555-888-1234 x147	Head Office	service	
Jessica Brown	jessb@facility.com	555-888-1234 x258	Head Office Warehouse	admin	

These hosts must be in the address book as contacts and can either be entered manually or imported via .csv file. If you're uploading a new contact in the address book manually, click on the blue button on the right side of the screen that says, **"Add Contact"**. Fill out the required information and save the contact.



To import contacts via a .CSV file, click the **"Import"** icon on the same row as the **"Add Contact"** button. Please make sure that that your .CSV includes a column for first name, last name and email, as these are mandatory fields.



Once you have made a properly formatted .CSV file, browse and drop the file into the file import window. Follow the prompts and your address book will then be imported via .CSV file.

Now that we've covered the **"Address Book"**, we can review some additional settings.

Additional Settings

Depending on your account access level, you will have the ability to see a variety of additional settings and options to continue to customize your VisitorOS portal experience.



Settings

- Sites
- Users
- Roles



Manage

- Address Book
- Documents
- Watchlist
- Devices
- Global Messaging



Resource Center

- Announcements
- Help Center
- Technical Support
- Share Your Feedback



Address Book

List of all known employees and visitors that have been added to the system.



Devices

See the live status of all currently connected devices assigned at a location or site.



Documents

Upload documents for review or training during visitor sign-in or pre-registration.



Global Messaging

Broadcast messages or alerts to all contacts in the address book instantly (account administrators only).



Watchlist

Grants the ability to prevent certain users from certain functions, receiving badges or from signing in altogether.



Resource Center

Quick access to FacilityOS announcements, useful resources and FAQs, technical support and product feedback.



Tooltip:

Have a question? We're here to help!

Reach out to onboard@facilityos.com for any additional assistance.



**Thank you for
choosing VisitorOS!
We're here to help
with any questions.**

onboard@facilityos.com

