



GUESTMANGER HOW TO GUIDE

Version 1.0

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How to Schedule an Appointment using the GuestManager system:

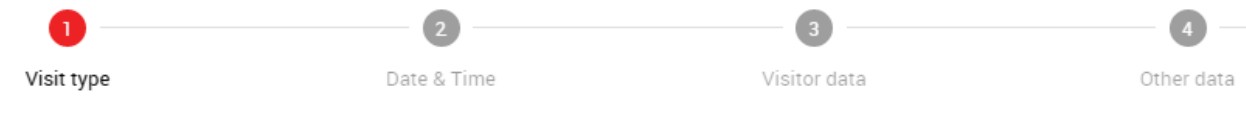
Select the Hamburger icon  to expand the Action menu.

 **Schedule Appointment**

Select "Schedule Appointment".

The Visit type page shows the different type of visits that are configured in the system. Visit types may vary depending on your customized VMS system.

Select "APPOINTMENT"



Choose a visit type

APPOINTMENT

On the Date & Time form, enter the visit details. Required fields may vary depending on your customized VMS system. An appointment will automatically be created for the entire day if no dates are selected. Select the "Date" field. A calendar will display. Select the date of the appointment.

Visit details

Date **2020**
13/04/2020

Mon, 13 Apr

Calendar view for April 2020:

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Choose the date the appointment will end in the "To date" field. The date fields are formatted as month, day, year. In the "Appointment time" field, enter the time the appointment will start. In the "To time" field, enter the time that the appointment is expected to end. The time fields are entered in 24-hour format.

From the Recurrence pattern area, select the desired settings for daily, weekly, monthly or annually scheduled appointments. For a one-time appointment, select No Recurrence.

Recurrence pattern

☐ NO RECURRENCE
 ☐ DAILY
 ☐ WEEKLY
 ☐ MONTHLY
 ☐ ANNUALLY

NEXT

Select "NEXT".

+ NEW VISITOR

Add the name of the visitor for whom you are making the appointment. Select "+ NEW VISITOR"

Begin typing the visitor's name in the First Name or Last Name field. If the visitor previously had an appointment scheduled that name will appear in a selection list. You may choose from the selection list or enter the full information for the visitor on the form. Fields marked with an asterisk are required. If you would like to Add another visitor to this appointment, check the "Add visitor". Select "SAVE".

Select "NEXT". At this time no "Other Information" is required. Select "NEXT".

After reviewing the appointment information, select "CONFIRM" to create the appointment. If changes are necessary, select "BACK". select "CANCEL" to leave without creating an appointment.

A confirmation email will be sent out to the person for who you scheduled the appointment.

How to Export a List of Visitors:

This option may not be available depending on the configuration of your customized VMS system. Check with your administrator for more information.

Select the Hamburger icon  to expand the Action menu.

Select "Create export" to expand the menu. Select "Visitors". Enter fields to filter the export on the form and then select "CREATE EXPORT" to download the filtered CSV file of visitors.

How to Manage Employees:

There are two ways to create an employee list: manually and by importing a file. This option may not be available depending on the configuration of your customized VMS system. Check with your administrator for more information.

Select the Hamburger icon  to expand the Action menu.

Select "Employees" from the menu on the left.

Add Employees Manually:

Select "NEW" to add a new employee manually.

Enter the employee's first name, last name, and email. Choose your company name from the dropdown list. The list of companies in the Company field is configured by the administrator.

If this employee will login as the user on a Self Service kiosk that a badge printer is connected to, add the printer information under Other Information. The printer and print queue are configured by the administrator.

Import a List of Employees from a File:

To import a list of employees from a file, select, UPLOAD EXCEL. A properly formatted file must be supplied. The format of the file can be obtained by selecting "EMPLOYEE EXCEL IMPORTFILE". Importing from a file will ADD (not replace) the employees in the list. Downloading an employee list is not an option at this time.

How to Manage Access to GuestManager:

First, add the person that you would like to grant access to the GuestManager the Employees List. See "How to Manage Employees".

Then select the Hamburger icon  to expand the Action menu.

Select "Manage logins" from the menu on the left.

Select "NEW"

Enter the Username.

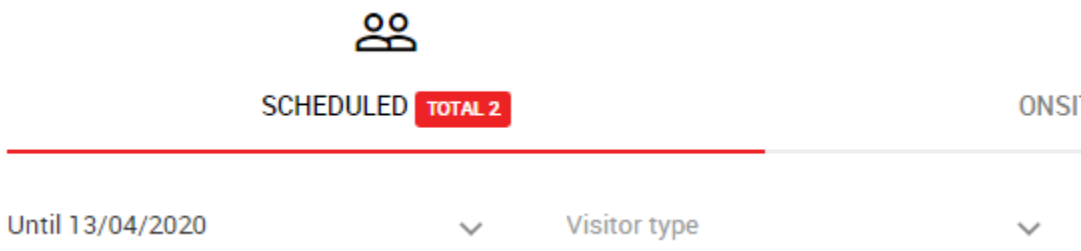
Select a Role from the dropdown list. For example, select "Employee".

Under Employee, select the employee name. Only names that do not have a login will be available in the dropdown list.


How to View Scheduled Appointments in the GuestManager system:

Select the Hamburger icon  to expand the Action menu.

To view the scheduled appointments, select "Scheduled" from the menu on the left. By default, the page will filter on today's appointments. To view other dates or other visit types, select the filter areas under SCHEDULED.



To view the Badge, Visitor information or Host information, select the red text for that appointment. To cancel or edit the appointment, print the badge or view the appointment details, select the corresponding icon for that appointment.

 Hover over each icon to display the function of that icon.

Access the list of visitors that are ONSITE by selecting the tab at the top or from the left menu. To view the visitor history select the HISTORY tab or select History from the left menu.

How to View the List of On-Site Visitors:

The GuestManager system allows you to view a list of visitors that are currently on-site. The list of visitors can be easily accessed remotely or on-site which could be a very useful feature if an emergency situation arises.

Select the Hamburger icon  to expand the Action menu.

From the left menu select "Scheduled".

Select "ONSITE" at the top middle of the screen. The visitors that are currently on-site will be displayed. The list may be sorted by selecting any of the column headers.

How To Manage the Visitor List in the GuestManager System:

Select the Hamburger icon  to expand the Action menu.

From the left menu select "Visitors"

You may Add a new visitor by selecting the "NEW" button. To edit, delete or view details for any visitor in the system, select the appropriate icon on the right of the menu.

How to Update the Configuration Settings for the GuestManager Interface:

If the administrator has changed configuration settings that need to be made visible on the GuestManager site, follow these steps.

Select the Hamburger icon  to expand the Action menu.

Select "Settings"

Choose language

☒ English (United Kingdom)

Refresh config settings

REFRESH

Select "REFRESH"

You may need to refresh your browser to see the changes that were made.

How to Get Technical Support:

Select the Hamburger icon  to expand the Action menu.

To contact nuMedia for support, click the logo on the bottom left of the Action menu which will display phone and email information.