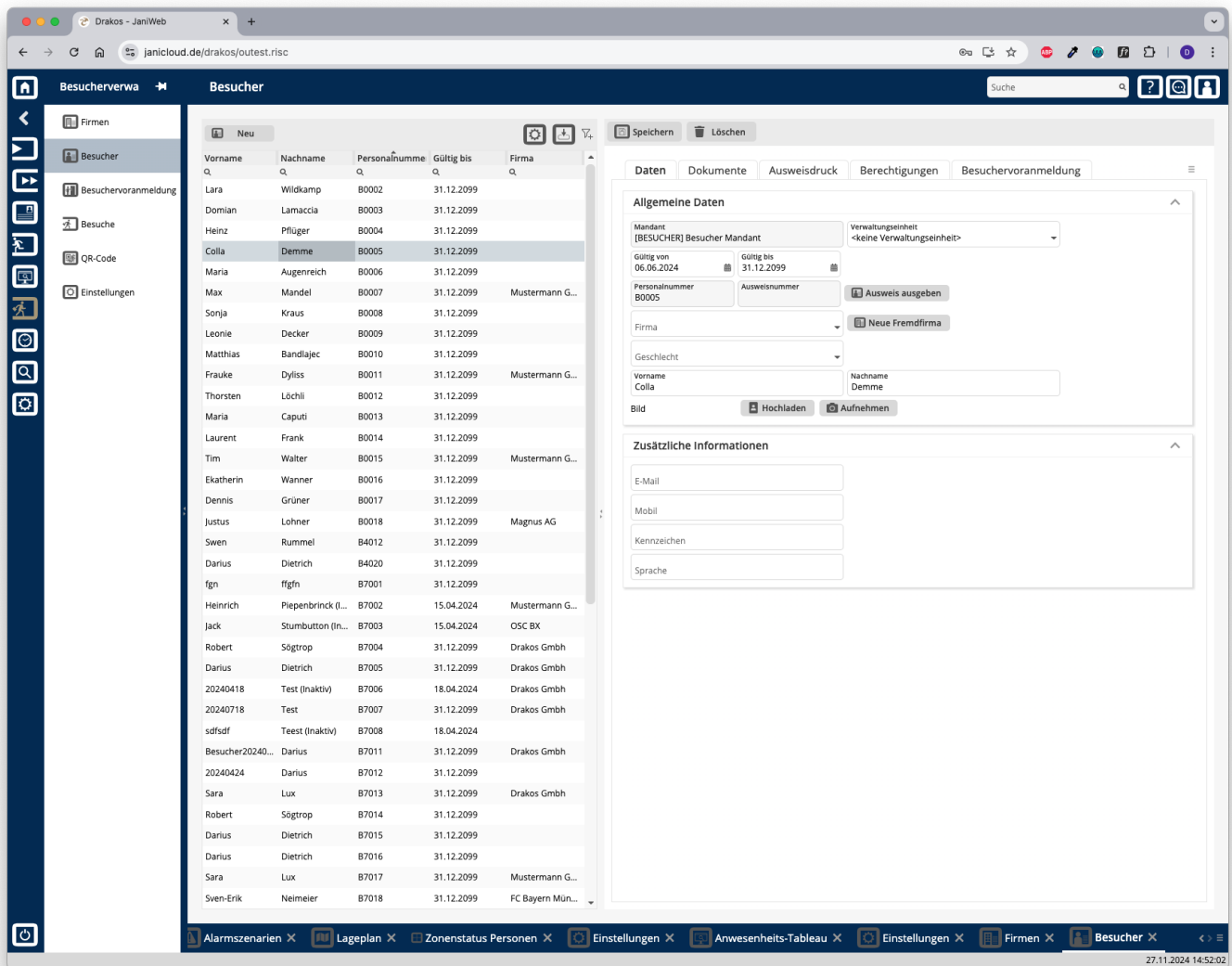


# Visitors

You can manage visitors in the system via the menu item **Visitors**. Here you can create new visitors and assign them to a company that has been created under the menu item **Companies**.



## List of visitors

The list contains the visitors already created. Select a visitor to display details. The list offers the following options:

- **Select columns to display:** Press the gear icon. Select which columns you want to display and in which order. Arrange the columns using the mouse or the arrow icons. Press *Apply* to adopt the changes.
- **Filter by client and status:** Press the filter icon. Select the clients and the status (*Active*, *Active in future*, *Inactive*) for which visitors should be displayed. Changes are visible immediately.
- **Search in columns:** Enter text or numbers in the search field (magnifying glass icon) of a column to search for names, personnel numbers, or other criteria. The entries take effect immediately: the list only displays hits.  
Tip: Search for substrings. You can find “Spencer-Churchill” with “spe”, “chur” or “hill”. The search is not case sensitive.
- **Export the entire list:** Press the download icon. Select the format in which you want to export the list. The export files are downloaded or displayed depending on the browser/operating system settings. For details on the available export formats, see the [General > Export Formats](#) chapter of this manual.

## Button *New*

Press *New* to create a new visitor. Enter the required information for the visitor on the tab *Data* and press *Save*.

## Button *Save*

You can change the details of the selected visitor. Press *Save* to save the changes.

## Button *Delete*

Press *Delete* to delete the selected visitor. A confirmation dialog will appear.

## Tab *Details*

This is where you store and edit visitor-related data. You can individually define which fields and areas are available here via *Settings > tab General*.

# Tab *Documents*

Here you can link documents to the personnel master record. This tab also contains the documents that the visitor is required to view and sign when self-registering.

# Tab *Badge Printing*

This feature is optional and not available in every installation. Depending on the version, it may also be available in the main menu.

This tab allows you to print badges with the visitor's information. You can define the layouts for printing badges via the menu item *Badge Printing > Settings*.

# Tab *Permission*

Here you can grant (*Add Group / Add Device*) or revoke (*Remove Device Group / Remove Device*) permissions for the visitor. This tab also provides an overview of the access events linked to the visitor.

If the tabs *Delete Device* or *Delete Group* contain a device or device group, access via this device or device group is not possible. This also applies if a permission for the device or device group has been granted on the tabs *Add Device* or *Add Group*.

A tick after the title of a tab indicates that there is data within the tab.

# Workflow Permissions

This feature is optional and not available in every installation.

If assigning a device or device group is associated with a workflow, the permission becomes active only after the decision-maker approves the workflow request.

If you select a device or device group that has a workflow, a dialog box appears. This prompts you to enter values for the time model and the validity of the permission. You also have the option of leaving a comment for the decision-maker.

You can create multiple workflow requests at once. To send them, press *Save*.

Workflow requests are indicated by different colors:

- **Yellow:** The request has not yet been approved.
- **Green:** The request has been approved.
- **Red:** The request has been rejected.

You can extend the validity of approved permissions. To do this, press *Extend*. Then select a new validity period and create another workflow request.

## Tab *Registration*

Here you can directly register the selected visitor for a visit. To do this, enter all the required information and press *Save*. The visitor now appears in the *Visits* menu item under *Upcoming*.

## Tab *Identification*

Here you can manage the various media that a person can use to identify themselves on a device. To add a new identification medium, press *Add*.

- *Identification:* Enter a value for the medium in this column (e.g. "F DD 193E" for a license plate).
- *Type:* Select the type of identification in this column (e.g. license plate).
- *Valid from / Valid to:* Define a validity period for the medium.
- *Prohibition:* In this column, you can block individual identification media.
- To remove an identification medium, use the trash icon.

Press *Save* to save the entries.

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### TIPS

You can specify which fields are displayed on the tab *Registration* via the menu item *Settings* for visitor management.

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