A MITEL PRODUCT GUIDE

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Visit Reception Online Help

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Visit Reception 1

This chapter contains the following sections:

- Getting started
- Single visitor
- Group of visitors
- Find subscriber
- Minimize window
- Settings
- Reports
- Labels
- Barcode reader
- Keyboard shortcuts

1.1 Getting started

To start the program click on the icon for CMG Visit Reception.

You can also start the program from Windows start menu (Start -> Program -> Aastra -> CMG Visit Reception).

To allow multiple instances of Visit Reception to run at the same time, start the program from the command prompt window with the command line switch -a. *For example*: "C:\Program Files\Aastra\Visit 7.5\Reception\VisitReception.exe" -a

1.1.1 Login

You will need to ***login*** to Visit Reception. Enter your ***User name*** and ***Password*** and click on ***OK*** in the dialog box that appears.

1.1.2 The main page of Visit Reception

After you have logged in to Visit Reception you will see the main page of the program. This is the page where you have an overview of visitors. You can search for visitors and view visitors that are e.g. checked in or checked out.

1.1.3 View visitors

By default you will see a list of today's visitors immediately after you've logged in. The list doesn't include already checked out visitors. The visitors' name, company, arrival time and the name of the person they will visit is shown together with his/her phone numbers and status. At the bottom of the window you can see how many visitors there are.In the drop-down list ***Visitors today*** you can choose to see:

- Visitors that are scheduled for tomorrow
- Visitors that are checked in
- Visitors that are checked out
- Visitors that are expected
- Visitors that are delayed
- Visitors whose check out time has exceeded
- All visitors

1.1.4 Search

You can search for a visitor by different criteria, such as name, company and host. To do a search you enter for example "Smith" in the ***Name*** field and press ***Enter*** or click on the ***Search*** button (above the search fields). The search fields are configurable.

You don't have to enter the whole name, company name or telephone number. To search for "Smith" it suffices to enter only "S". Then you'll get a list of all persons whose last name begins with an "S".

> **Note**: If you search by first name you must enter a space before the name. If you want to search for all names, phone numbers etc., you enter an asterisk (*) in the search field.

1.1.5 Manage visitors

By right-clicking on a visitor you can select the following actions:

- Check in the visitor when he/she meets the host
- Check out the visitor when he/she leaves
- Set status to "Arrived" when he/she arrives at the reception
- Edit visit data
- Delete the visitor
- Print a badge for the visitor
- View other visitors with the same host
- Register new visitors with the same host
- View extensive information about the host with "Subscriber info"

By checking the box to the left of the status symbol you register that the host has been informed that his/her visitor has arrived.

> **Note**: If using a barcode reader, visitors are checked in and out by reading the barcode on the visitor's badge.

1.2 Single visitor

1.2.1 Register a new visitor

Follow the steps below to successfully register a new visitor.

Note:

The fields where you enter details about visitors are configurable. The following description is an example of how it can look. At your organization the system might not have exactly the same fields.

1. Click on the ***New visitor*** button. This opens the ***Register a new visitor*** window.
2. Enter the visitor's ***First name***, ***Last name*** and the ***Company*** he/she comes from.
3. Specify who the visitor will visit. Search for the ***Host*** by entering either his/her name, telephone number or organization. Read more about how to Getting started. By clicking the "i" you can view additional information about the host.
4. Choose which ***Category*** of visitor you are registering. This could be "Visitor", "Course Participant", "Job interview" or something else that has been predefined in the system.
5. Check ***Contacted*** if the host is informed about that the visitor has arrived.
6. Specify the visitor's ***Arriving*** and ***departing*** time.
7. Choose the ***Reception*** that handles this visit.
8. Specify the current status of the visitor: ***Not checked in***, ***Arrived***, ***Checked in*** or ***Checked out***.
9. If you want you can add additional information in the ***Information*** field. The information in this field will be shown on the screen when you check out the person. This may for example be useful as a reminder if the person has left something in the reception that should be returned.
10. Check the ***Secret*** box if telephone attendants should not be able to see information about the visit.
11. Click on the ***Save*** button or on the ***Save/Close*** button to save the registration. The ***Save*** button saves and creates a new visitor with the same data, except for name and company. The ***Save/Close*** button both saves and closes the window.

Good to know:

- Another way to register a new visitor is to right-click on a visitor in the overview and select ***New visitor***. Then a new visitor window will be opened with the same host as the clicked visitor.
- If the visitor has visited before you can reuse the information by clicking ***Get history***. Use the search fields to search and then double-click on the visitor in the result list. Then the previously stored information will be filled in for the new visit.
- If you want to print out a ***Visitor Badge***, choose type of badge in the drop-down list at the bottom of the page and click on the ***Print*** button.
- Click on ***Clear*** if you want to clear all data for the visitor without saving.
- Click on ***Delete*** if you want to delete the visitor you are about to register.
- Click on ***Cancel*** if you want to close the window without registering a visitor.
- In Visit Reception you can always close a window by pressing the ***Esc*** button.

1.2.2 Edit a visitor

Sometimes you might need to change a scheduled visit. To do this you:

1. Search for the visitor you need to edit (read about how to search for a visitor in Getting started).
2. Double-click on the visitor. This will open the ***Edit visitor*** window.
3. Make the changes (for example if you need to change the name of the visitor, you just select the name field and change the name.
4. Press **Save/Close**.

1.2.3 Delete a visitor

You can delete a visitor, for example if a visit gets cancelled. There are two ways to delete a visitor:

1.2.3.1 Delete a visitor, first way

1. Search for the visitor (read about how to search for a visitor in Getting started).
2. Right-click on the visitor. This opens a menu.
3. Choose ***Delete.***
4. Answer ***Yes*** to the question "Do you really want to delete this visitor?"

1.2.3.2 Delete a visitor, second way

1. Search for the visitor you need to delete (read about how to search for a visitor in Getting started).
2. Double-click on the visitor. This will open up the ***Edit visitor*** window.
3. Press ***Delete*** at the bottom of the window.
4. Answer ***Yes*** to the question "Do you really want to delete this visitor?".
5. Press ***Save/Close***.

1.3 Group of visitors

1.3.1 Register a group of visitors

You can register a whole group of visitors at the same time. This is faster than to register each visitor one at a time. Follow the procedure below to register a group of visitors.

1. Click on the ***New Group*** button.
2. Enter a name for the new group.
3. Enter the first and last name of one of the first visitor.

4. Enter the name of the company he/she is from. If all visitors in the group are from the same company you can check the box ***Use same company name***. This will store the company name so you won't have to enter it for all visitors from the group.
5. Click on the ***Right arrow*** to add the visitor to the list box.
6. Add the rest of the visitors by following the same procedure.
7. Find the visitors' host by typing the name, phone number or organization and clicking the magnifying glass. You can view information about the host by clicking the "i".
8. Choose the ***Category*** of visitor.
9. Check ***Contacted*** if the host is informed about that the visitors have arrived.
10. Specify the visitors' ***Arriving*** time and ***until*** when they will stay.
11. Choose the reception that handles the visit.
12. Specify the current status of the visit: ***Not checked in***, ***Arrived***, ***Checked in*** or ***Checked out***.
13. Add additional information in the ***Information*** field (if appropriate). The information in this field will be shown on the screen when you check out the group. This may for example be useful as a reminder if someone in the group has left something in the reception that should be returned.
14. Click on the ***Save*** button or on the ***Save/Close*** button to save the registration. (The ***Save/Close*** button both saves and closes the window.)

Good to know:

- Within your organization's Visit system there might be additional fields to fill with information.
- If the group has visited before, you can reuse the information by selecting it under ***Existing groups***.
- If you want to register another group of visitors, click on the ***New*** button.
- If you want to print ***Visitor badges***, choose type of badge in the list at the bottom of the page and click on the ***Print*** button.
- If using visitor badges with barcode, each member of the group gets a unique barcode.
- Click on ***Delete*** if you want to delete the group of visitors you are about to register.
- Click on ***Cancel*** if you want to close the window without registering a group of visitors.

1.3.2 Edit group of visitors

Sometimes you might need to change a scheduled visit. To do this you:

1. Search for the group, either by group name or by the name of one of the visitors belonging to the group (read about how to search for a visitor in Getting started).
2. Double-click on one of the visitors. This will open the ***Edit group*** window.
3. Make the changes. If you need to change the details about a certain member of the group, select that person from the list by clicking on his/her name. Then change the name, company or whatever necessary.
4. When you are done, press ***Save/Close***.

1.3.3 Delete group of visitor

You can delete a group of visitors, by following this approach:

1. Search for the group by group name, or by the name of one of the visitors belonging to the group (read about how to search in Getting started).
2. Double-click on the visitor. This will open up the ***Edit group*** window.
3. Press ***Delete*** at the bottom of the window.
4. Answer ***Yes*** to the question "Do you really want to delete this group of visitors?".
5. Press ***Save/Close***.

1.4 Find subscriber

To find a subscriber click on the ***Find subscriber*** button. You can for example search by name, telephone number and organization. To for example search for the Bob Smith at Market:

1. Enter "Smith Bob" in the ***Name*** field
2. Enter "Market" in the ***Organization*** field.
3. Click on ***Search***. The search result gets listed below.

By right-clicking on the subscriber you can select the following actions:

- Send an SMS to the subscriber that he/she has a visitor.
- Send an e-mail to the subscriber that he/she has a visitor.
- See extended information about the subscriber.
- Register a new visit with the subscriber as a host.
- Register a new group of visitors with the subscriber as a host

When you are finished, click on **Close**.

You can read more about searching in the Getting started chapter.

1.5 Minimize window

To the right in Visit Reception you can see a list of all visitors with visitor status **Arrived**, **not checked in** or **exceeded**. If you click on the **Minimize** button Visit Reception will be minimized but you will still be able to see the list of currently checked in and/or arrived visitors. This way you can continue to work with other tasks, but stay alert on the visitor situation.

You can check in a visitor that appears in the minimize window, by **double-clicking** on him/her. If you click once on the visitor you can change the status to **Arrived** or set **Check in**. You can also delete the visitor, **print a visitor badge** and **contact the visitor's host**.

1.5.1 Contact host

If you click on a visitor that appears in the list in the "Minimize" window to the right, you can choose to send a message to the visitor's hosts, to brief him/her that his visitor has arrived:

1. Click on a visitor in the list to the right.
2. In the menu that appears, choose ***Contact host***.
3. Choose ***Send SMS*** or ***Send mail***, depending on which way you want to contact the host. A message saying that the subscriber's visitor has arrived is sent.

1.6 Settings

In the menu ***Edit->Settings*** you can define some different settings that concern the behavior of Visit Reception. The following section contains short descriptions of what is meant by each setting. To access a certain setting you click on the corresponding tab.

1.6.1 Views

Here you can choose which CMG view to connect to:

1. Select the CMG view in the ***Change view*** drop-down list.
2. Click ***Save***.

1.6.2 Language

You can choose in which language to run Visit Reception. To do this you:

1. Select the language in the drop-down list.
2. Click ***Save***.

1.6.3 Printer/labels

In Printer/labels you can define which printer to use when printing visitor badges:

1. Select printer in the drop-down list.
2. Click ***Save.***

You can select what type of label to use when printing badges:

1. Select label in the drop-down list.
2. Click ***Save.***

To select which language Visit Reception labels should be printed in, do the following

1. Select language in the drop-down list.
2. Click ***Save.***

1.6.4 Reception

Some organizations can have several receptions. If you are working at such an organization you can specify in which reception you are working. To do this you:

1. Select reception in the drop-down list.
2. Click ***Save***.

1.6.5 Other settings

In Other settings you can make additional adjustments. See the following table for a description:

Setting name	Description
Opacity	Level of transparency of the "Minimize" window, when you have clicked on the "Minimize" button and only see a list of arrived and checked-in visitors. You set the opacity to a level between 0-100 where 0 is total transparency.
Always on top	Refers to the "Minimize" window. If you want it to always show on top of other programs, you should set it to "Enabled".
AutoPrint	When you have checked-in a visitor, his/her badge can automatically be printed. If you prefer it this way, you should set "Autoprint" to "Enabled".
AutoSave	When you print a visitor badge, the visitor is automatically saved, if you set "Autosave" to enabled.
AutoCheckIn	The visitor automatically gets checked-in when you print a visitor badge, if enabled. **Note**: Do not enable if using barcode reader.
AutoCaption	If enabled all new visitors' first and last names will begin with capital letters
AutoHistory	Visit Reception automatically search in the history when a new visitor is added, if enabled.
FireReport/Reception	Set to enabled to create one fire report per reception.
Show popups	Select to show popup with information about the visit at mouse over. If a photo of the host is available, this is included in the popup.

1.7 Reports

1.7.1 Fire report

In the menu ***Reports-> Fire report*** you can quickly print out a list of all visitors with status "Checked in" or "Arrived". The list contains the visitors' names, the companies they belong to as well as the hosts they are visiting. The hosts' telephone numbers and organization belonging are also listed. The fire report can be an important help in case that you quickly need to get a list of all people who are visiting your organization at the moment. To produce the fire report:

1. Click on ***Reports->Fire report*** to open the fire report.
2. Now you have some different options:

   a. To print the report, click on ***Print***.
   b. To preview the report to see how it will look once printed, click on ***Preview***. You can print the list from the Preview window, by clicking on the printer icon.
   c. To save the list to file click on ***Save to file***. Specify where you want to save the file and click on **Save.**

1.7.2 Archive report

It is possible to see information about visits that already have taken place. To search for old visits:

1. Go to the menu ***Reports->Archive report***. This will open the ***Find in archive*** window.
2. Search for former visitors by entering the visitor's name or company, or the host's name.
3. If you want you can specify a search period. Select ***From date*** and ***to date***.
4. Click on ***Search***. You will see the search results in the lower part of the window.

You can choose to preview, print and save the results in the same way as with Fire report.

1.7.3 Other reports

In ***Reports-> Other reports*** you have more ways of producing visitor reports. Here you can search for visitors by visitor category (e.g. course participant), by reception (if you have several different receptions at your organization) or by different visitor status (such as expected visitors and delayed visitors). When you are satisfied with the search criteria, you click on ***Search*** to perform the search.

You can print the "Visitor report", preview it and save it to file, in the same way as you do with Fire report.

1.8 Labels

1.8.1 About labels and printers

In this chapter you can read about how to design and print visitor badges. You design different labels in the external program ***BarTender***. To start working with labels you need to perform the steps below:

1. Install a printer. It is easiest to install the printer on the computer where you intend to run BarTender. (If visitors should be able to print badges directly from the self registration computer, you will need to let also that computer have access to the printer.)
2. After installing the printer you need to specify which kind of paper to use when printing badges.

3. Install the program ***BarTender.*** BarTender must be installed on each computer where Visit Reception is run.
4. Start ***BarTender.*** You will see the "Welcome!" window, where you will be asked to either start a new label format, open an existing or use a recently used format. The first time you probably want to choose "Start a new label format..."

> **Note**: If using a barcode reader to check in or out visitors select a BarTender field of type CODE128 as label format.

5. Choose if the new label should be based on an existing label, or if it should be blank.
6. Choose which printer to use with the new label.
7. Choose "specify custom settings".
8. Choose if you want the label to be printed vertically (choose "Portrait") or horizontally (choose "Landscape").
9. Specify the shape of your label ("rectangle", "circle", etc.).
10. If you want, specify the margins of the label.
11. **Important!** Set both the row and the column to **1**!
12. If you want, set the label size manually.
13. If you want, add a background to your label.
14. Click finish!

Now you have performed the first steps on the way to creating a new label. At this point you can start to design the label in terms of fonts, texts, positions etc. Read more about this in the next section, Creating labels with BarTender.

1.8.2 Creating labels with BarTender

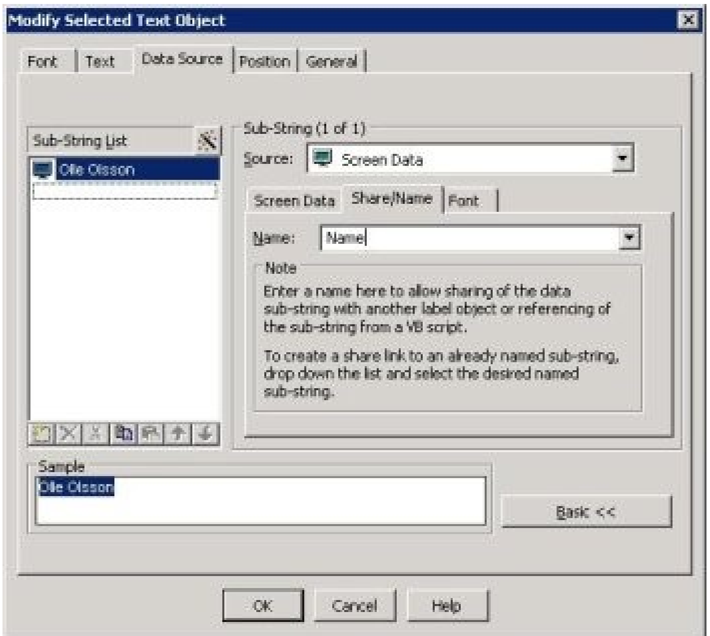
> **Note**:
>
> It is advisable to not have BarTender and Visit Reception open at the same time. There is a user guide in BarTender, please refer to it for details about how to use the program (within BarTender you press F1 to open it). However, there are some issues that are very good to know of when creating labels for Visit Reception. These are described below.

1.8.2.1 How to link information from Visit to labels

In BarTender you can either write text directly with the keyboard, or collect it from the database where Visit details are stored. To do it the latter way you:

1. Add a text box to your label, by clicking on the "T" in the toolbar and then click somewhere on the label. To add a barcode, see Adding a barcode to the label.
2. Right-click on the text box and choose ***Properties***.
3. Choose the tab ***Data Source***.
4. Click on the ***Advanced*** tab (down to the right).

5. Now choose the tab ***Share/name***. See the picture below!



6. In the name field you specify the parameter name you want to add. If you for example want to add the visitor's last name you type "LName". For company name you type "Company". Note that upper and lower case characters have to match. You find a list of all parameters below.
7. Click on ***OK*** to close the window.
8. Repeat steps 1-6 as many times as you want. Typically you would want to add the visitors' first and last name as well as their company name.
9. Now you need to save the label, for example in C:\Program Files\Aastra\Visit\CMG Visit Reception \Labels

1.8.2.2 Adding a barcode to the label

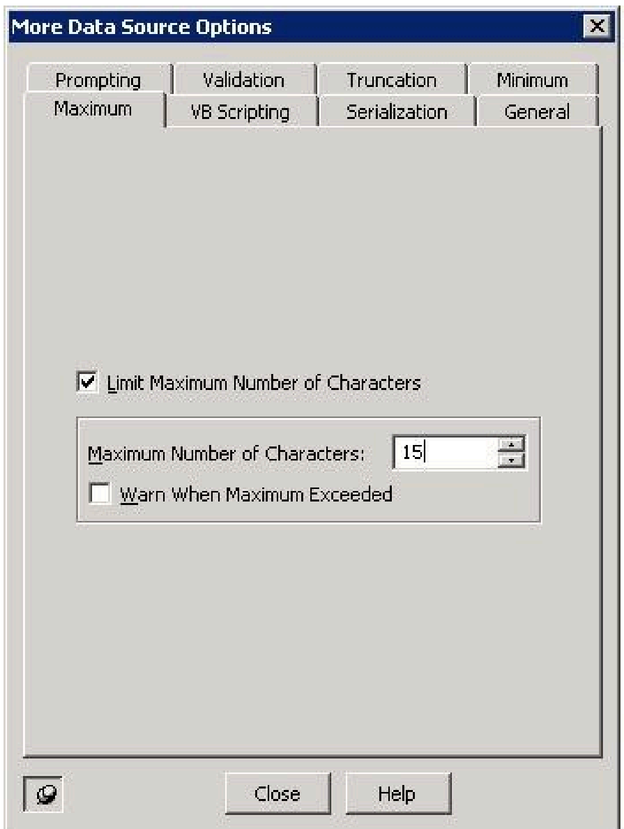
To add a barcode to the label, do the following:

1. Click ***Create*** from the BarTender menu, select ***Bar Code*** and then click somewhere on the label.
2. Right-click on the barcode and choose ***Properties***.
3. Choose the tab ***Data Source***.
4. Click on the ***Advanced*** tab (down to the right).
5. Now choose the tab ***Share/name***.
6. In the name field you specify the parameter name you want to add (Barcode).
7. Choose the tab ***Bar Code***, and from the ***Symbology*** drop-down list, select ***Code 128***
8. Choose the tab ***Human Readable***, and set ***Visibility*** to ***None***
9. Click on ***OK*** to close the window.

Note: If you click on the **Screen Data** tab (in the picture at step 6), followed by **More options** you will get more options of managing your labels. You can find one useful tool in the **Maximum** tab (see the picture below). Here you can specify the maximum number of characters that should show on the label. This way you can avoid text from being written outside of the actual badge.

Note:

The check box "Warn When Maximum Exceeded" should NOT be checked, since that can cause problems.



In Visit Reception you can choose to use your newly made label when printing badges. How to specify this is explained in Settings. Close BarTender before opening Visit Reception.

1.8.2.3 Parameter specification

The following list specifies the parameters that you can use to print information stored in Visit. Please note that you have to spell the parameters exactly as in the table below.

Parameter	Description
Name	The visitor's name (both first and last name).

Parameter	Description
LName	The visitor's last name.
FName	The visitor's first name.
Company	The visitor's company belonging.
Status	The visitor status (not checked in, arrived, checked-in or checked-out).
isGroup	If the visitor is member of a group, the string *"group"* is printed on the label.
Host	The host's name (both first and last name).
m_lname	The host's last name.
m_fname	The host's first name.
m_Orgname	The host's organization belonging.
m_Telno	The host's phone number.
Mobile	The host's mobile phone number.
m_House	The host's house.
m_Room	The host's room.
ReceptionName	The name of the reception that handles the visit.
Category	The category of the visitor (for example course participant).
ActDate	The date and time when the visit begins.

Parameter	Description
DeactDate	The date and time when the visit ends.
ActDay	The date (only) when the visit begins.
DeactDay	The date (only) when the visit ends.
ActTime	The time (only) when the visit begins.
DeactTime	The time (only) when the visit ends.
ActWeekday	The day of the week when the visit begins.
DeactWeekday	The day of the week when the visit ends.
Info	Text from the field "Information".
misc1	Configurable field.
misc2	Configurable field.
misc3	Configurable field.
misc4	Configurable field.
misc5	Configurable field.
misc6	Configurable field.
misc7	Configurable field.
misc8	Configurable field.
misc9	Configurable field.

Parameter	Description
misc10	Configurable field.
GroupName	The name of the visitor group.
GroupId	The ID record number of the visitor group. (Empty string if no group.)
Barcode	The visitor's barcode.
Custgrp	Customer group (in CMG) that the host belongs to.

1.9 Barcode reader

With the barcode reader you can check in or check out visitors from Aastra Visit. The barcode is printed together with other user information on a standard visitor's badge.

1.9.1 Using the barcode reader

Make sure the Visit Reception application is active by clicking in the main window. Also make sure that no message box is open in Visit Reception. Input dialogs, for example ***New Visitor*** can be open.

Do the following to check in or out visitors:

1. Read the barcode on the badge.
2. Any of the following happens:

   a. If the vistor is registered but not checked in, the visitor gets checked in.
   b. If the visitor is checked in, the visitor gets checked out.

Note:

- If a visitor that was previously checked out tries to check in again, the following message is displayed: "Visitor *John Smith* has already checked out"
- To check in the person again, you must register a new visit.
- If the visitor you try to check in is not registered for the day in question, the following message is displayed: "Visitor not found"
- To be able to check in the person, you need to register the person for a visit this day.
- A badge can be reused for a visit that spans a number of days. This means the same badge can be used when the vistor arrives the next day.

1.10 Keyboard shortcuts

There are a number of keyboard shortcuts that you can use in Visit Reception. A list of them is provided here below.

Keyboard Shortcut	Description
Ctrl + p	*Prints a label* for selected visitor, but first asks you which label to use.
F1	Opens the *online help*.
F2	*Checks in/out* a selected visitor.
F3	*Prints a label* for the selected visitor.
F4	Opens the *Search subscriber* window.
F5	

Note:

You can also print labels by using the keyboard shortcuts when you are in the following windows:

- Main window
- Register a new visitor
- Register a new group
- Edit visitor
- Edit group

You can always use the ***Escape*** button to close a window.