BuildingEngines

Guard User Guide

Checking in pre-registered and unannounced visitors and executing visitor lists

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Overview

The guard interface is to be used in conjunction with the Visitor Management module of Building Engines. The guard interface allows guards to check in pre-registered visitors, add unannounced visitors, and run visitor lists and/or audits.

Logging into Building Engines

This section describes the process of logging into the guard portal of the application.

To access the Building Engines guard portal:

1. Navigate to http://buildingengines.com/login.

2. Enter your username and password into the appropriate fields.
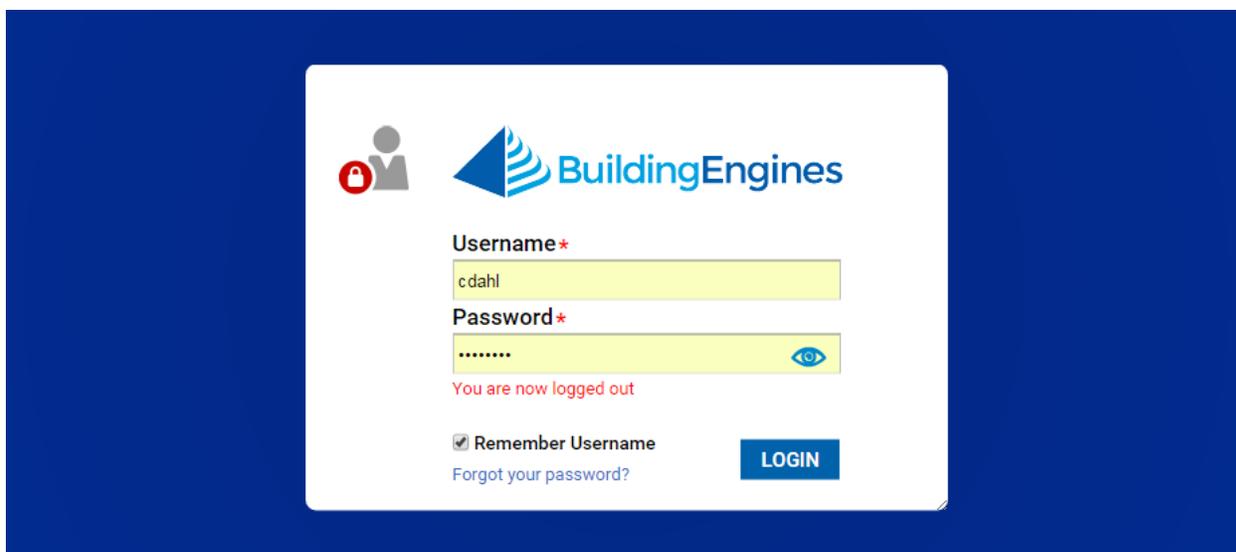
3. Click **Login**.

Visitor Management

The Visitor Management module allows you to manage and audit visitors to your building. Visitors can be entered into the Building Engines application via Property Management staff, guards, and tenant employees. Typically a visitor is preregistered and then checked in upon their arrival. However, if the visitor arrives unannounced they can be entered into the application and checked in via the guard interface. This guide reviews the visitor management functionality, checking in visitors , and running visitor specific reporting.

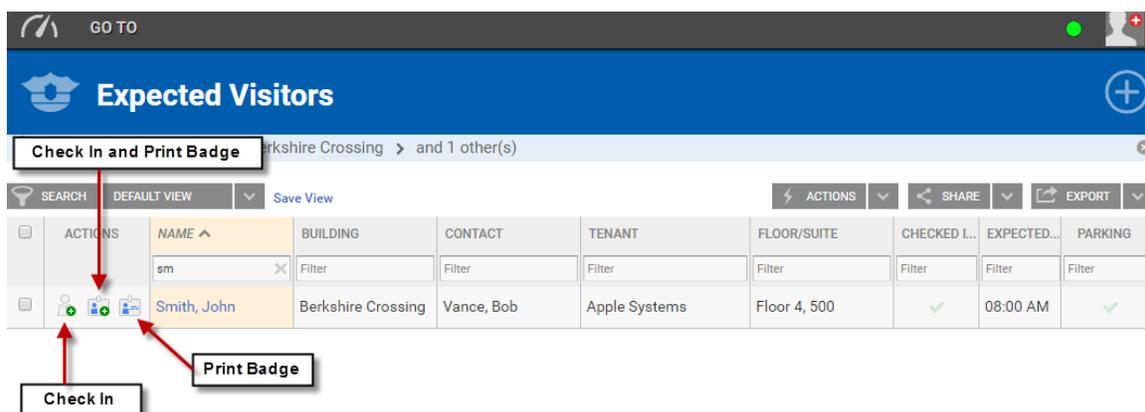**Checking in a Pre-Registered Visitor**

This section describes the process of checking in a pre-registered visitor.

To check in a pre-registered visitor:

1. Navigate to the **NAME** field and enter the first or last name of the pre-registered visitor. *Note: You can also search using the first few letters of the visitor's last name*.
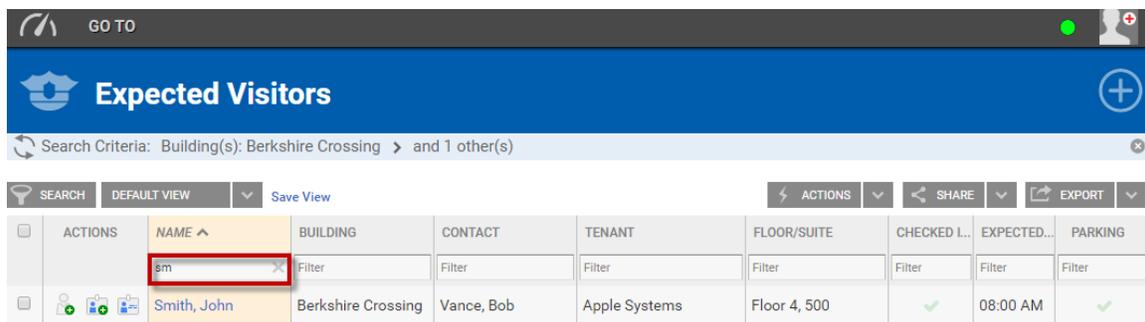
2. Under the **ACTIONS** section, click **Check In**, **Check In and Print Badge**, or **Print Badge**.

Checking in Multiple Pre-Registered Visitors

This section describes the process of checking in multiple visitors at once.

To check in multiple pre-registered visitors:

1. Navigate to the **CONTACT** field and enter the first or last name of the contact that the visitors have come to see. *Note: You can also search using the first few letters of the contact's name*.

2. (Optional) Using the **TENANT** field, enter the name of the Tenant Company that the visitors have come to see.

3. Click the checkboxes located to the left of their names. *Note: The top checkbox selects/deselects all of the checkboxes on the page*.

4. Hover over **ACTIONS** and select either **Check In**, **Check In and Print Badge**, or **Print Badge**.

Checking in an Unannounced Visitor

If a visitor arrives at your building and hasn't been pre-registered you can enter their name and check them in at the guard station. This section describes the process of entering and checking in an unannounced visitor.

To register and check in an unannounced visitor:

1. Click the Add Visitor ⊕ icon.

2. Using the **Add Visitor** pop-up, enter: **BUILDING**, **VISITOR TYPE**, **TENANT**, **FLOOR/SUITE**, **TIME**, **DATE**, **NAME**, **CONTACT**, (OPTIONAL) **CONTACT PHONE**, and (OPTIONAL) **NOTE**.

3. Click **SAVE**.

4. Under the **ACTIONS** section, click **Check In**, **Check In and Print Badge**, or **Print Badge**.

Printing a Visitor List

This section describes the process creating a printer-friendly PDF of your expected visitors or a visitor list from a previous day.

To print a visitor list:

1. For the current day visitor list, hover over **ACTIONS** and select **Print Visitor List**.

2. (Optional) To print a visitor list from a previous day:
   a. Click **SEARCH**.
   b. Select the **DATE** using the calendar.
   c. Click **SEARCH**.
   d. Hover over **ACTIONS** and select **Print Visitor List**.

Exporting and Sharing a Visitor List

After a visitor list has been run you have the option of exporting and sharing the list in a PDF, CSV, or XLS format.

To export and share a visitor list:

1. Click **SHARE** and select your preferred format (**PDF**, **CSV**, or **XLS**). A new browser opens with the message recipient functionality and your attached visitor list.

2. (Optional) Edit the **SUBJECT**, **MESSAGE**, and **SENDER ALIAS** fields to your preference.

3. Select your recipients and click **SEND**.

Deleting a Visitor

In some instances it may be necessary to remove a pre-registered visitor from the list of Expected Visitors. This section describes the process of deleting a visitor.

To delete a visitor:

1. Under the **Actions** tab on the homepage, click **Expected Visitors**.

2. Enter the last name of the pre-registered visitor into the **NAME** field. *Note: You can also search using the first few letters of the visitor's last name*.
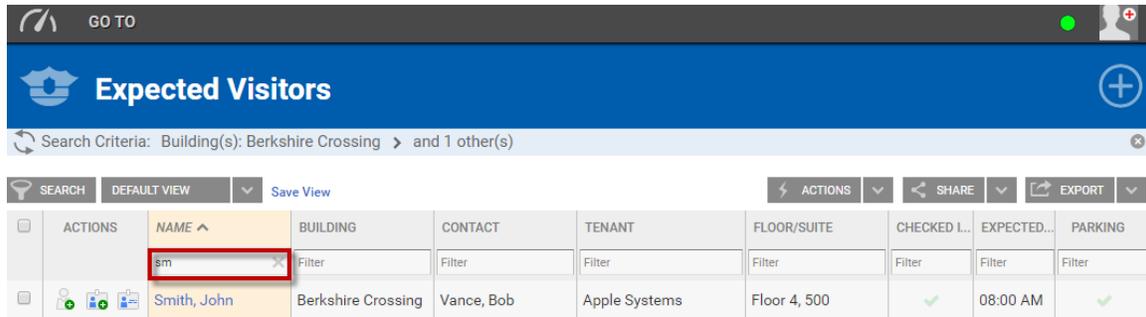
3. Click the checkbox located to the left of their name.

4. Click **ACTIONS** and select **Delete**.

Photo Check-In

The Photo Check-In functionality allows you to capture a photo of each visitor at the time of check-in. A new photo is required with each day's visit to prevent out of date photos and/or confusion with visitor names. This section describes the Photo Check-In functionality.

Technical Requirements for Photo Check-In

Browser: Only recently have browsers supported camera connections without the need for additional software. To limit potential problems and simplify the camera setup, Building Engines strongly recommends using the **Google Chrome** or **Mozilla Firefox** browsers in conjunction with the Photo Check-In functionality. *Note: If you want to stop on-going camera connection prompts in Firefox, click the "Always Allow" option*.

Camera: Any **USB-connected camera** that is recognized by Windows (and by applications like Skype and GoToMeeting) should also be accessible to Google Chrome or Mozilla Firefox. Building Engines has successfully tested a variety of webcams from Logitech and other manufacturers. *Note: Building Engines cannot provide technical support for 3rd party digital cameras and webcams*. However, if you are having trouble using your camera with Photo Check-In, please contact our Support team for assistance.

Checking in a Pre-Registered Visitor (Photo Check-In)

This section describes the process of checking-in a pre-registered visitor using the Photo Check-In workflow.

To check in a pre-registered visitor:

1. Enter the first or last name of the pre-registered visitor into the **NAME** field. *Note: You can also search using the first few letters of the visitor's last name*.

2. Click the visitor's name.
3. Click **Take Photo**.

4. Using the camera viewer pop-up, center the visitor on the camera viewer, and click **Take Photo**.
5. (Optional) To retake the photo, click **Retake**.
6. To save the photo with the visitor record, click **SAVE**.

7. Click either **CHECK IN** or **CHECK IN AND PRINT**.

Checking in a Visitor without a Photo (Photo Check-In)

This section describes the process of checking-in a pre-registered visitor, using the Photo Check-In workflow, if you are unable to take a photo. For example, if you experience a problem with the camera or the visitor does not consent to a photo.

To check in a pre-registered visitor without a photo:

1. Enter the first or last name of the pre-registered visitor into the **NAME** field. *Note: You can also search using the first few letters of the visitor's last name*.

2. Select **Check-in without a photo** and enter the **REASON** you are unable to capture a photo.
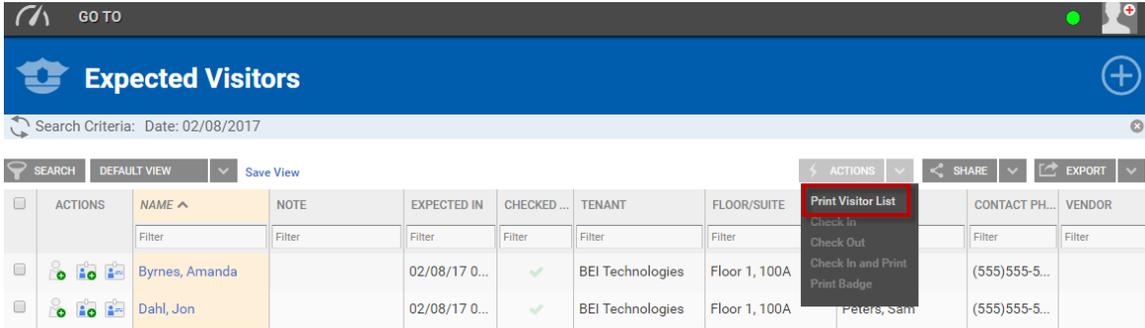

3. Click either **CHECK IN** or **CHECK IN AND PRINT**.

Printing a Visitor List

This section describes the process creating a printer-friendly PDF of your expected visitors or an audit from a previous day.

To print a visitor list:

1. For the current day visitor list, hover over **ACTIONS** and select **Print Visitor List**.

2. (Optional) To print a visitor list from a previous day:

   a. Click **SEARCH**.

   b. Select the **DATE** using the calendar.

   c. Click **SEARCH**.

   d. Hover over **ACTIONS** and select **Print Visitor List**.

Exporting and Sharing a Visitor List

After a visitor list has been run you have the option of exporting and sharing the list in a PDF, CSV, or XLS format.

To export and share a visitor list:

1. Click **SHARE** and select your preferred format (**PDF**, **CSV**, or **XLS**). A new browser opens with the message recipient functionality and your attached visitor list.

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