

ID VisitControl

ID VisitControl Additional Modules

Additional Modules documentation

ID VisitControl offers you modules that can be combined in different ways with different functional ranges for your visitor management.

You can relieve your employees with additional modules, because you can easily combine all additional modules with each other. Decide for yourself what your visitor software should be able to do. You can add an additional module at any time to improve your visitor management.

Below you will find detailed documentation on how to use the additional modules in your visitor software ID VisitControl.

- [Additional Modules - Module Assistance](#)
- [Additional Modules - Badge printing in kiosk](#)
- [Additional Modules - Barcode login](#)
- [Additional Modules - Notification](#)
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- [Additional Modules - Client system](#)
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- [Additional Modules - Office](#)
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Additional Modules - Module Assistance

As standard, only visits and pre-registrations for which you are assigned as an employee are displayed in all lists in the Intranet module of visitor management. The extension module Assistant of the visitor management software ID VisitControl now allows to additionally display the entries that were created by the user for another employee.

In the following examples we explain the benefits of the additional module Assistance.

Create more transparency and a better workflow for your employees with the additional module Assistance. You will have clearly clearer workflows and thus satisfied employees and happy guests in your company.

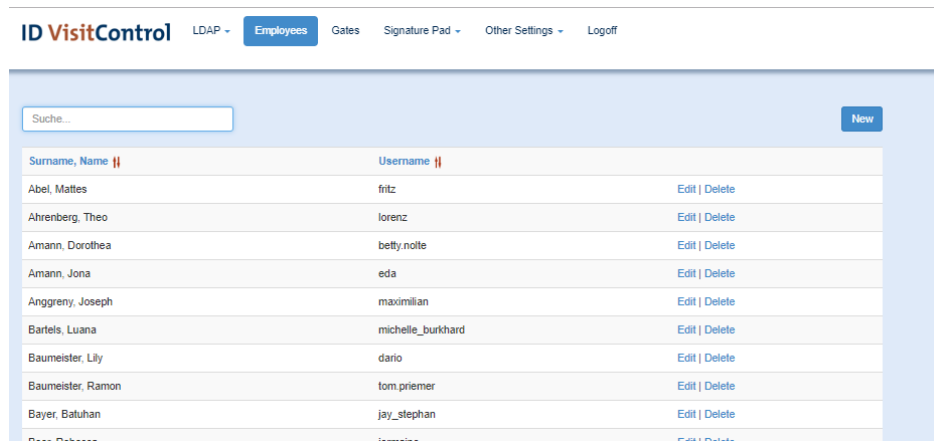
- [Defining Departments in Administration](#)

Defining Departments in Administration

In the following, we explain how you can assign an employee to a department.



First click on the **Employees** selection field.



To edit a displayed name, click **Edit**.

ID VisitControl LDAP - **Employees** Gates Signature Pad - Other Settings - Logoff

Name

Surname

Phone

E-Mail

Department

Language

Gates

Username

New password

PW repeat

Pool

LDAP Sync ☐

Login User ☒

Admin ☐

Empfang ☒

Intranet ☒

Kiosk ☒

© 2019 - ID VisitControl Administration

Wenn Sie eine Abteilung in der Dropdown-Menü ausgewählt haben, bestätigen Sie Ihre Eingabe mit dem Button „**Speichern**“.

Wie Sie eine neue Abteilung anlegen oder bearbeiten finden Sie hier: [Other Settings Departments](#)

Additional Modules - Badge printing in kiosk

In the kiosk of the visitor software ID VisitControl, the visitor is registered directly after entering all visitor data, including the signature to the corresponding instruction text. This functionality is now complemented by the simultaneous creation and automatic printout of the visitor badge.

In the following, we will explain the benefits of the additional module for printing badges in the kiosk.

The Kiosk module enables your visitors to register themselves. Using a tablet PC or a touch screen, your visitors can intuitively register themselves and make visitor management noticeably easier for you.

In the course of self-registration, your individual security instruction is displayed to the visitor in the Kiosk module and a signature is requested. If you have selected an appropriate report for the kiosk in the administration and have specified the corresponding printer, an ID card is printed automatically after self-registration in the kiosk module or after approval by the reception.

How to register in the kiosk can be found here: [Visitor Registration - Module Kiosk](#)

Additional Modules - Barcode login

The additional module barcode login, is excellent and only suitable for permanent visitors or frequently returning visitors. In order not to have to register the permanent visitor anew in the visitor software ID VisitControl every time he visits, the visitor badge of a permanent visitor can be printed with a barcode.

By the independent registration and deregistration of your permanent visit, your visitor administration is significantly simplified and your reception noticeably relieved.

Additional Modules - Notification

Due to the spatial separation of the reception and the employees from other entrances, it is not always possible to maintain direct communication. Especially in visitor management this can be very important, if e.g. a special guest is expected and appropriate preparations for the reception have to be made.

In the following documentation, we explain the benefits of the Notification add-on module.

Additional Modules - Entrance separation

With the additional module entrance separation, an activation for the individual entrance and gate selection can be made in the module intranet of the visitor software ID VisitControl. If there are several gates or entrances within a company, an entrance can be selected for each pre-registration at which the visitor is expected to arrive.

With this additional module you increase the clarity of the pre-registrations within the individual gates and increase the efficiency of the visitor receptions and the visitor administration software ID VisitControl. Thus you create more transparency and a better workflow for your employees. You will have clearly arranged workflows and thus satisfied employees and happy guests in your company.

In the following documentation, we will explain the benefits of the additional module entrance separation.

Additional Modules - Excel-Import

By default, visitor groups are created manually in the Visitor Management Intranet module. The extension module Excel-Import of the visitor management software ID VisitControl now allows to import an Excel file with all necessary information.

For example, you can have your visitor group fill out the Excel file in advance and then import it into ID VisitControl. This saves a lot of time when pre-registering the visitor group or the Multi Besucher. Your employees can also use the Excel file to enter all necessary information about the visitor group or multi-visitor.

- [Excel-Import Group visitors](#)
- [Excel-Import Multi visitor](#)

Excel-Import Group visitors

In the following documentation, we will show you how to import a completed Excel file into all fields fully automatically.

[Download the Excel table for entering all important data free of charge.](#)

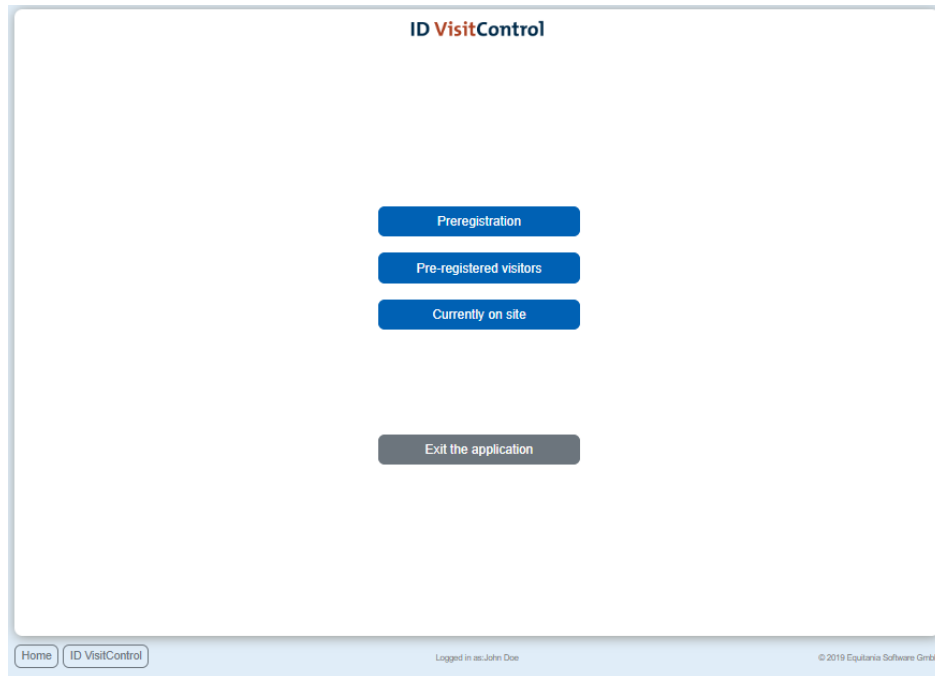
First fill in all required fields in the Excel table.

Fields marked in red are mandatory.

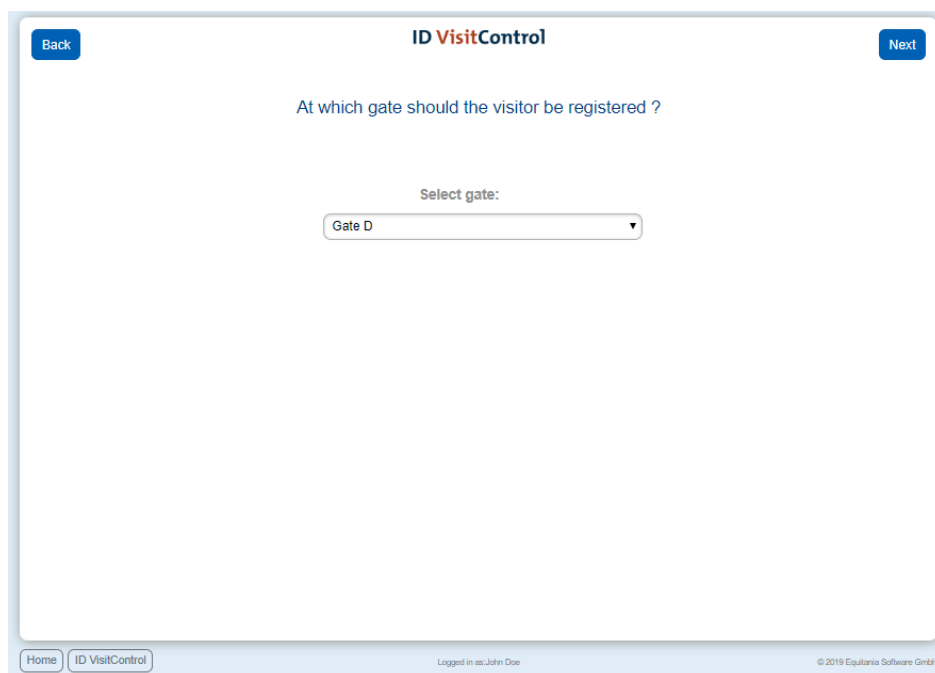
| | A | B | C | D | E |
|----|-------------------------------|--|----------------|---|---|
| 1 | Gruppe: | Testgruppe Excel-Import | | | |
| 2 | Bemerkung: | | | | |
| 3 | Mitarbeiter: | Max Mustermann | | | |
| 5 | Gruppenleiter | | | | |
| 6 | Nachname: | Mustermann | | | |
| 7 | Vorname: | Max | | | |
| 9 | Firma | | | | |
| 10 | Name: | Equitania Software GmbH | | | |
| 11 | Stadt: | Pforzheim | | | |
| 13 | KFZ-Nummer: | PF-TG 55 | | | |
| 14 | Zufahrt nötig: | JA | | | |
| 15 | E-Mail: | Testgruppe@muster.de | | | |
| 16 | Telefon: | 07000 55555 | | | |
| 17 | Kategorie: | | | | |
| 18 | Einfahrtplaketten Nr.: | 15 | | | |
| 20 | Kommt | | | | |
| 21 | Datum: | 27.06.2019 | | | |
| 22 | Zeit: | 14:00 | | | |
| 24 | Wird gehen | | | | |
| 25 | Datum: | 27.06.2019 | | | |
| 26 | Zeit: | 17:00 | | | |
| 28 | Besucher: | Nachname | Vorname | | |
| 29 | | Musterfrau | Maria | | |
| 30 | | Mustermann | Max | | |
| 31 | | Muster | Heinrich | | |
| 32 | | Beispiel | Elfriede | | |
| 33 | | Testmann | August | | |
| 34 | | | | | |
| 35 | | | | | |
| 36 | | | | | |
| 37 | | | | | |
| 38 | | | | | |
| 39 | | | | | |
| 40 | | | | | |
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| 45 | | | | | |
| 46 | | | | | |

Once you have filled in all the fields, save the Excel table in your file so that you can find it again in the next step and assign it clearly.

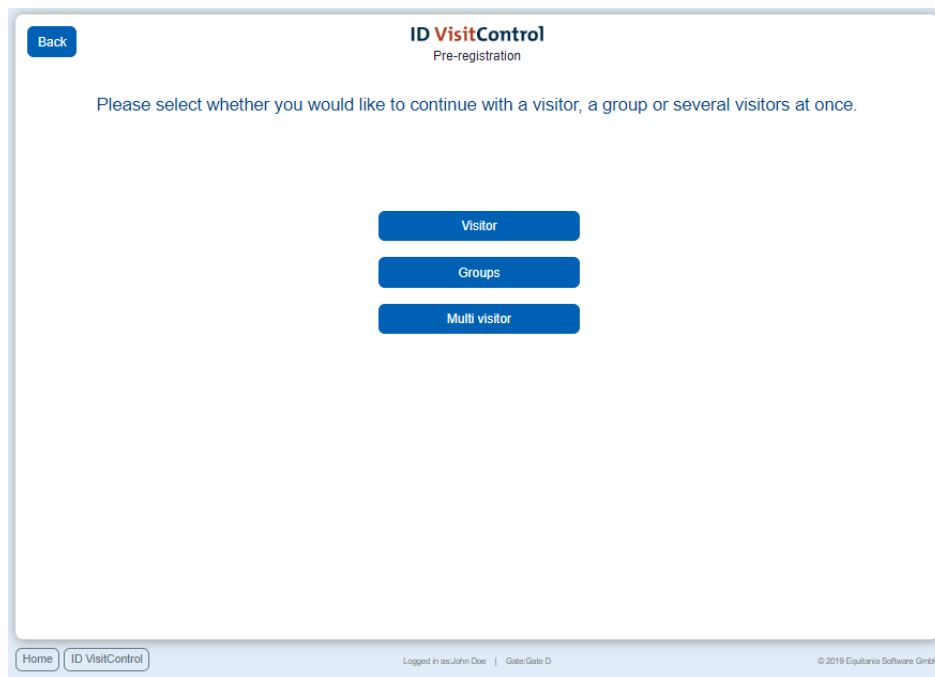
Now go to the Intranet module of your visitor software ID VisitControl.



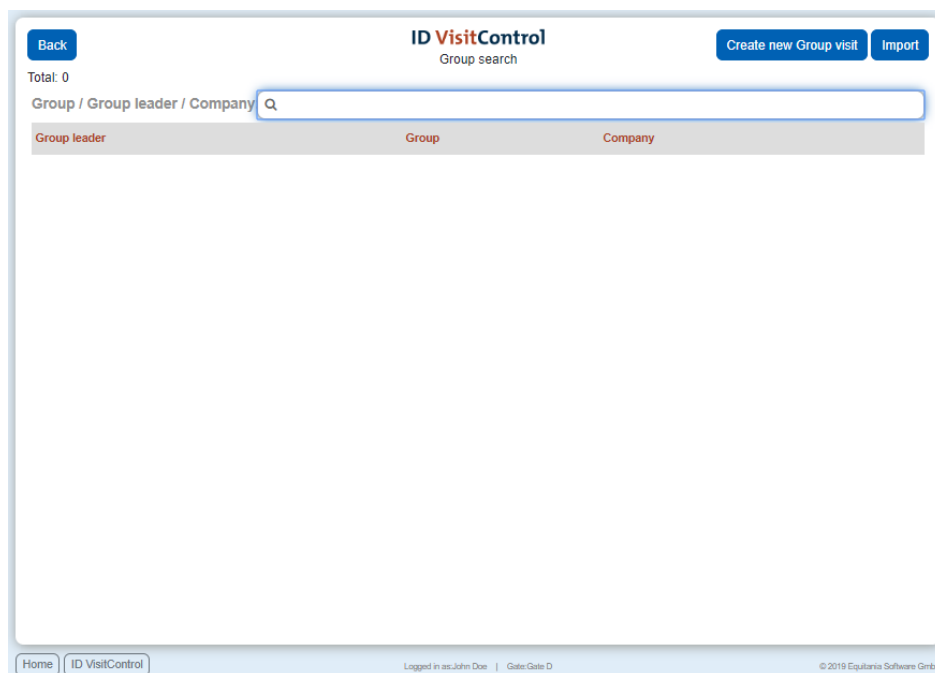
First click on the **Pre-registration** button.



You can select the desired gate from the drop-down menu in the gate selection. The visitor is registered at this gate. Click **Next** to open the main menu.



Here you can select single or group multi visitor registration. In this case click on the **Groups** button.



To import the Excel file into your visitor software ID VisitControl, click on the button **Import**.

Back

ID VisitControl
Excel-Import

Upload file

Home ID VisitControl

Logged in as: John Doe | Gate: Gate D

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To upload the file, click on **Upload file**.

In your files, select the Excel file for your group registration and load it into visitor management.

Back

ID VisitControl
create visitor

Next

Group* Testgruppe Excel-Import Participant total:* 5
Comment: Create visitor
Employee:* Q John Doe
Phone/Department: 0123 / 123456 / Verkauf

Contact details of the group leader

Surname:* Mustermann Name:* Max
Company:* Q Equitania Software GmbH, Pforzheim Edit company
License plate: Phone: 07000 55555
E-Mail: Testgruppe@muster.de Category:
Car Access: ☒ WLAN: ☒
Arrive: 08.10.2019 14:01 Departure time:

Home ID VisitControl

Logged in as: John Doe | Gate: Gate D

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ID VisitControl
Group member

Back Done

Surname: Name: Add

| Surname | Firstname | Delete |
|------------|-----------|--------|
| Musterfrau | Maria | Delete |
| Mustermann | Max | Delete |
| Muster | Heinrich | Delete |
| Beispiel | Elfriede | Delete |
| Testmann | August | Delete |

Home ID VisitControl

Logged in as: John Doe | Gate: Gate D

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As you can see, all the information you filled in was automatically transferred directly to ID VisitControl.

The visitor management automatically creates a new company if the company does not already exist.

Click the **Continue** button to complete the process.

ID VisitControl

The registration was successful

Done

Next registration

Home ID VisitControl

Logged in as: John Doe | Gate: Gate D

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Now you have the possibility to get to the main menu via the button **Done** or to start the **Next registration**.

Excel-Import Multi visitor

In the following documentation, we will show you how to import a completed Excel file into all fields fully automatically.

[Download the Excel table for entering all important data free of charge.](#)

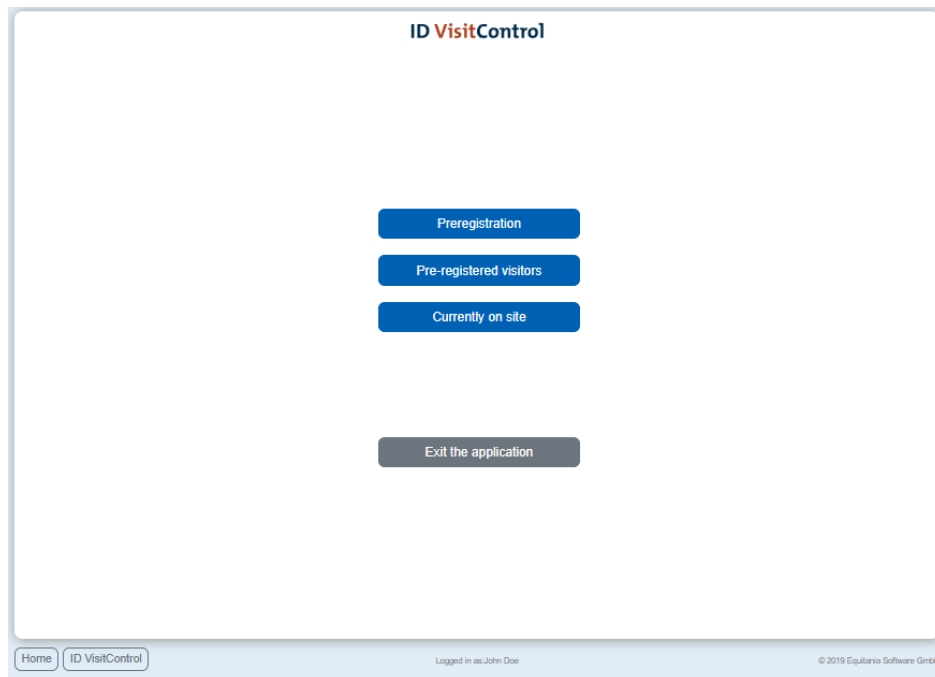
First fill in all required fields in the Excel table.

Fields marked in red are mandatory.

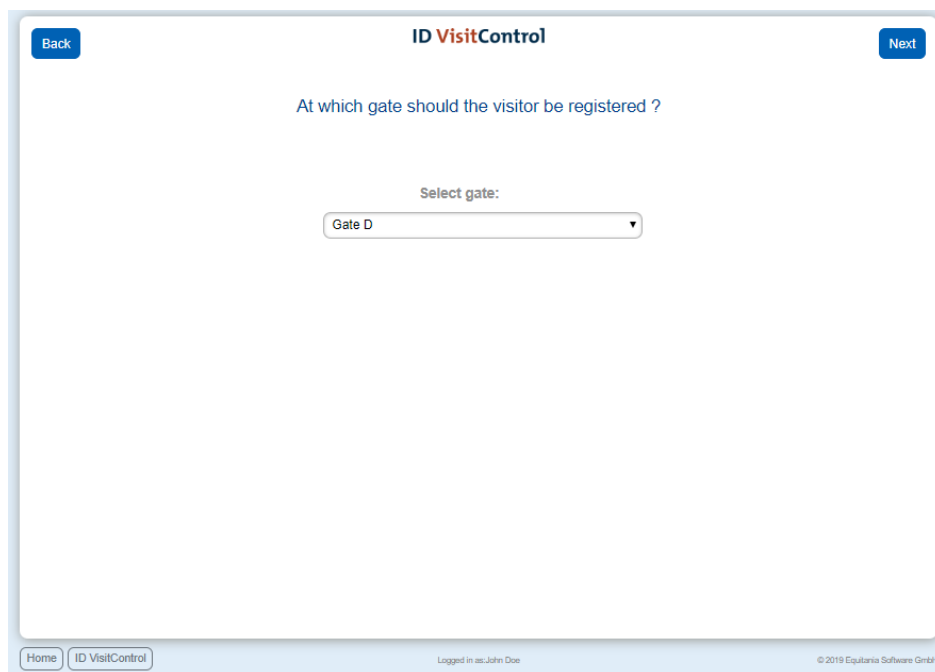
| | A | B | C | D | E | F |
|----|----------------------------------|-----------------|-----------------------------|---------------|----------------|---|
| 1 | Mitarbeiter: | John Doe | | | | |
| 3 | KFZ-Nummer: | PF EQ 4711 | | | | |
| 4 | Zufahrt nötig: | y | y oder n (y = ja, n = nein) | | | |
| 5 | WLAN: | n | y oder n (y = ja, n = nein) | | | |
| 6 | Kategorie: | Kunde | | | | |
| 7 | Einfahrtplaketten Nummer: | | | | | |
| 9 | Custom Auswahl: | | | | | |
| 10 | Visit Custom 1: | | | | | |
| 11 | Visit Custom 2: | | | | | |
| 12 | Visit Custom 3: | | | | | |
| 14 | Kommt | | | | | |
| 15 | Datum: | 12.07.2019 | | | | |
| 16 | Zeit: | 10:00 | | | | |
| 18 | Wird gehen | | | | | |
| 19 | Datum: | 12.07.2019 | | | | |
| 20 | Zeit: | 11:30 | | | | |
| 22 | Besucher: | Nachname | Vorname | Firma | Stadt | |
| 23 | | Aschenbroich | Inka | Abramovic-S | Franziskastadt | |
| 24 | | Künkeler | Dieter | Kunststoff Gn | Karlsruhe | |
| 25 | | | | | | |
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| 41 | | | | | | |

Once you have filled in all the fields, save the Excel table in your file so that you can find it again in the next step and assign it clearly.

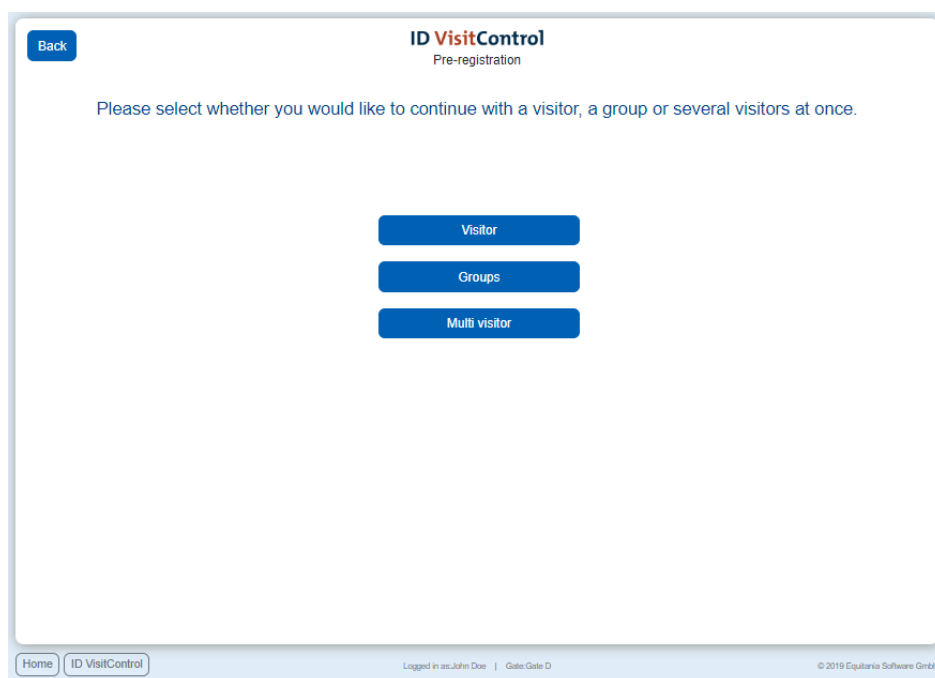
Now go to the Intranet module of your visitor software ID VisitControl.



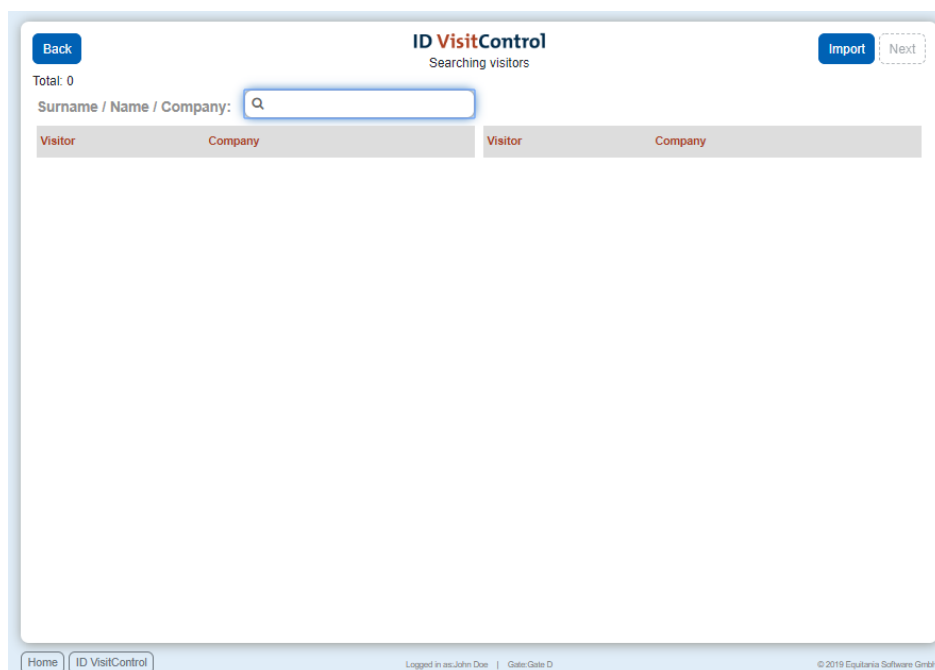
First click on the **Pre-registration** button.



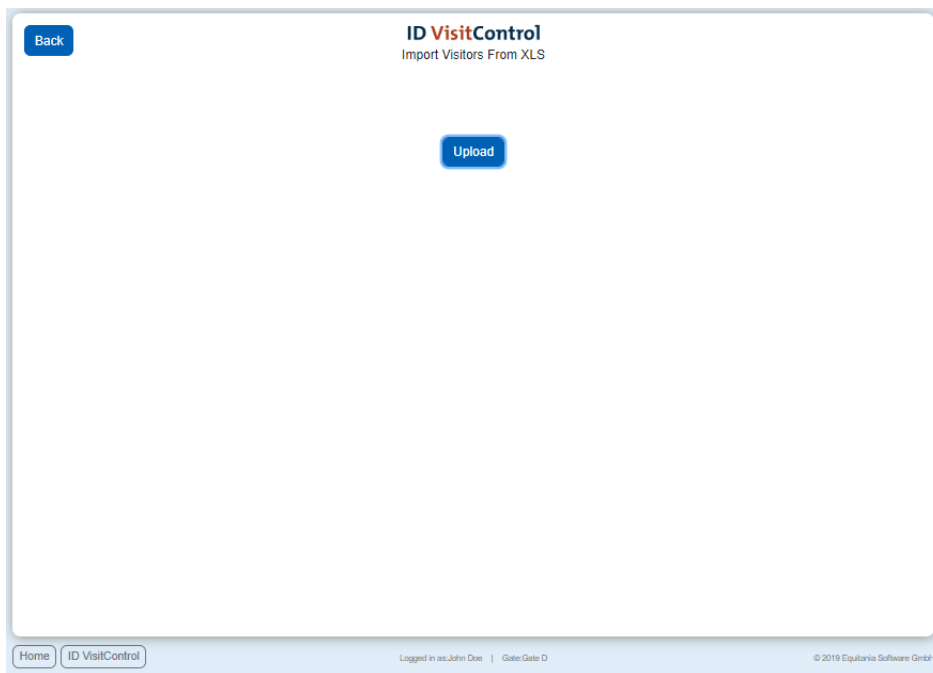
You can select the desired gate from the drop-down menu in the gate selection. The visitor is registered at this gate. Click **Next** to open the main menu.



Here you can select single or group multi visitor registration. In this case click on the **Multi visitor** button.

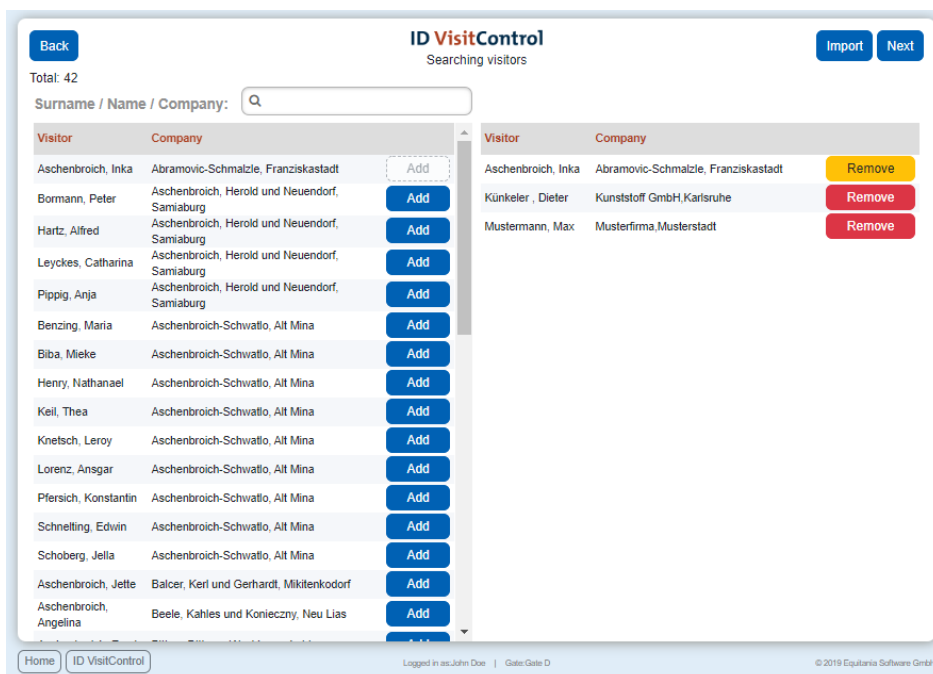


To import the Excel file into your visitor software ID VisitControl, click on the button **Import**.



To upload the file, click on **Upload file**.

In your files, select the Excel file for your group registration and load it into visitor management.



As you can see, all the information you filled in was automatically transferred directly to ID VisitControl.

The visitor management automatically creates all visitors that are listed in the Excel table, if the visitors do not yet exist. Here you see, Mr. Künkeler from Kunststoff GmbH, with the red button, there is not yet.

If you now click on the **Next** button, the logic goes through these visitors individually and adds them as with manual entry. This will take you to the detailed view of all new visitors and the associated companies to check them again. The information you have entered in the Excel table is already created and only needs to be confirmed.

The screenshot shows the 'ID VisitControl' interface for creating a new visitor. The title is 'Create new visitor'. There are 'Back' and 'Next' buttons at the top. The form contains the following fields:

- Surname: * (Input: Kunkeler)
- Name: * (Input: Dieter)
- Company: * (Input: Q. Kunststoff GmbH, Karlsruhe) with an 'Edit company' button
- Phone: (Empty input)
- Category: (Dropdown menu)
- E-Mail: (Empty input)
- Visitor - Custom1: (Empty input)
- Visitor - Custom2: (Empty input)
- Visitor - Custom3: (Empty input)
- WLAN: (Toggle switch, currently off)
- Establish long-term visit: (Section header)
- From: (Calendar icon)
- Until: (Calendar icon)

At the bottom, there are links for 'Home' and 'ID VisitControl', and a footer with 'Logged in as: John Doe | Gate: Gate D' and '© 2019 Equitania Software GmbH'.

Click the **Next** button to complete the process.

The screenshot shows the 'ID VisitControl' interface for firm data. The title is 'Firmendaten'. There are 'Zurück' and 'Bestätigen' buttons at the top. The form contains the following fields:

- Firma: * (Input: Kunststoff GmbH)
- Straße: (Empty input)
- Hausnr.: (Empty input)
- PLZ: (Empty input)
- Stadt: * (Input: Karlsruhe)
- Telefon: (Empty input)
- Fax: (Empty input)
- E-Mail: (Empty input)
- Homepage: (Empty input)
- Erstellt am: 12.07.2019 08:55:30
- Land: (Dropdown menu)

At the bottom, there are links for 'Home' and 'ID VisitControl', and a footer with 'Angemeldet als: Admin Admin | In Pforte: Tor A' and '© 2019 Equitania Software GmbH'.

The **Edit Company** button allows you to check the company's data and complete it if necessary.

The screenshot shows the 'ID VisitControl' interface for editing company data. The title bar includes a 'Back' button, the logo 'ID VisitControl company data', and a 'Confirm' button. The form fields are as follows:

| | | | |
|--------------|----------------------|----------|-------------------------------|
| Company:* | Kunststoff GmbH | | |
| Street: | <input type="text"/> | Number: | <input type="text"/> |
| Postal code: | <input type="text"/> | City:* | Karlsruhe |
| Phone: | <input type="text"/> | Fax: | <input type="text"/> |
| E-Mail: | <input type="text"/> | Website: | <input type="text"/> |
| Created: | 7/12/2019 8:55:30 AM | | Country: <input type="text"/> |

The footer contains 'Home' and 'ID VisitControl' buttons, the text 'Logged in as: John Doe | Gate: Gate D', and the copyright notice '© 2019 Equitania Software GmbH'.

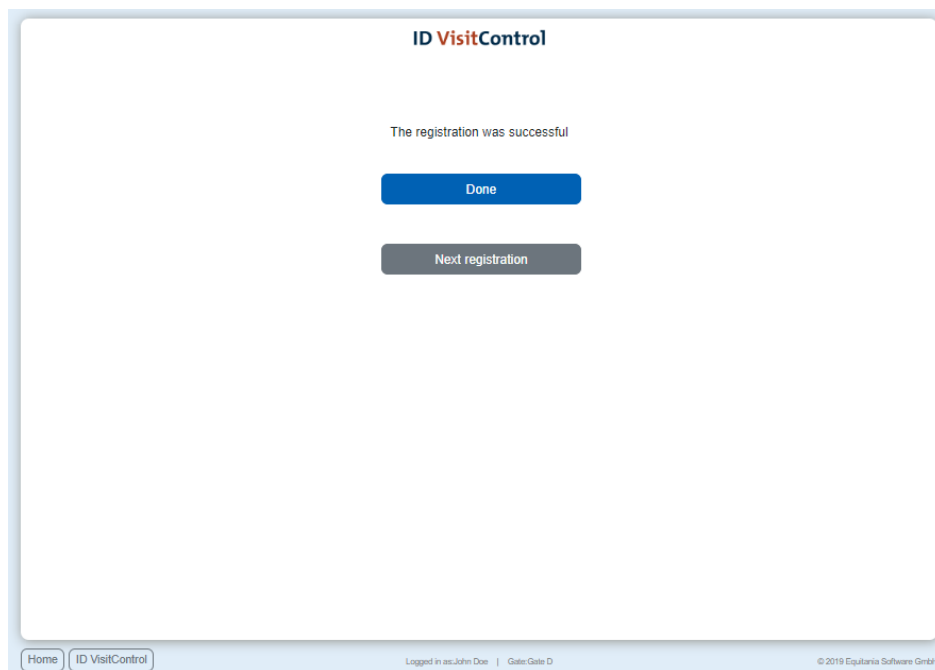
Click on the button **Next** to see an overview of the employees for whose arrival the multi-visitors will arrive.

The screenshot shows the 'ID VisitControl' interface for multiple registration. The title bar includes a 'Back' button, the logo 'ID VisitControl multiple registration', and a 'Next' button. The form fields are as follows:

| | | | |
|----------------|----------------------|-------------------------------------|-------------------------------------|
| Category: | Customer | Employee:* | Q John Doe |
| License plate: | TE ST 99 | Phone/Department: | 0123 / 123456 / Verkauf |
| Comment: | <input type="text"/> | | |
| Arrival time: | 08.10.2019 14:17 | Car Access: | WLAN: |
| | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| | | Departure time: | 15.10.2019 |

The footer contains 'Home' and 'ID VisitControl' buttons, the text 'Logged in as: John Doe | Gate: Gate D', and the copyright notice '© 2019 Equitania Software GmbH'.

Click the **Next** button to complete the process.



Now you have the possibility to get to the main menu via the button **Done** or to start the **Next registration**.

Additional Modules - Client system

With the help of this additional module of the visitor management software ID VisitControl, you have the possibility to separate data records with the one-time licensing of the corresponding modules. This allows you to enter visitor data in the ID VisitControl software and manage it separately from different locations. Each location can only view and change its data.

In the following documentation we will explain the benefits of the additional module Client Management.

Especially for companies with different locations, the additional module Client Management is perfectly suitable to separate visitor data optimally with one system and to enable a structural workflow.

In addition, you save the cost of licensing and installing several visitor software programs and the associated maintenance costs.

Additional Modules - Multi Visitor Registration

With the help of the additional module Multi Visitor Registration of the visitor management software ID VisitControl, you have the possibility to pre-register or register several visitors in one step.

The standard processes of registration and pre-registration are extended by the option of multiple selection and offers you the possibility to enter visitor-relevant information for several visitors in one step. Especially when dealing with visitor groups that you visit during an event, you can achieve significant time savings for your staff with this additional module.

You can also find user documentation on multi visitor registration here:

- [Multi-visitor registration - Module reception](#)
- [Pre-registration of multi visitors - Module Reception](#)

Additional Modules - Office

The additional module Office extends the reception, the intranet and also the kiosk by the possibility to send e-mails with necessary information at the end of a process.

You can send a maximum of 3 mails per process. In addition, you have the option of including a further selection field in the registration mask of the reception and intranet, whereby you can send further mails in addition to the automatically sent mails.

Example: Your visitor arrives at the reception desk and is registered by the staff. Once the registration is complete, you can now send e-mails depending on the configuration.

Please note that all mails have the same content.

For example, you can automatically send an e-mail to the responsible employee so that he knows that his visitor has been registered at reception.

In addition, send an e-mail to the visitor with necessary information such as the Wlan password in your company. Also send an e-mail to the canteen so that the staff in the canteen know that a visitor is coming for dinner.

Email templates can be attached to documents such as directions and safety briefings.

Email templates can be created, edited and deleted in the administration. In addition, you can make settings in the administration gates for which gates the e-mail should be sent and for which process.

- Create a new email template
- Edit email template
- Delete email template
- Define e-mail dispatch for gates in administration
- E-Mail template in the registration form

First of all, a visitor or permanent visitor must be registered or pre-registered. The visitor can also register himself at the kiosk.

- ID VisitControl Module Reception
- ID VisitControl Module Intranet
- ID VisitControl Module Kiosk

In the following example, we pre-registered a visitor in the Intranet module and sent an e-mail to the visitor + CSI file.

If the visitor now clicks on the file, he will be asked if he wants to add this Internet calendar in Outlook.

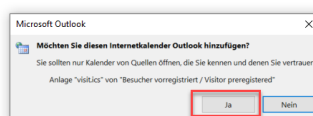
donotreply@domain.com
Besucher vorregistriert / Visitor preregistered

Aufbewahrungsrichtlinie Junk Email (30 Tage)
Dieses Element läuft in 29 Tagen ab. Um es länger zu behalten, müssen Sie eine andere Aufbewahrungsrichtlinie anwenden.

visits.ics
2 KB

Ihr Besuch wurde vorregistriert

Pin: 42253
Nachname: Musterfrau
Vorname: Marion
Gruppe:
Firma: Equitania Software GmbH, Pforzheim
Telefon:
Kategorie: Kunde
E-Mail:
KFZ-Nummer:
Bemerkung:
Zufahrt nötig: Nein / No
Einfahrtplaketten Nummer:
Besucherausweis Nummer: 6
Kommt - Datum: 12.06.2019
Kommt - Uhrzeit: 16:39
Wird gehen - Datum: 12.06.2019
Wird gehen - Uhrzeit: 17:39
Von:
Bis:
VisitCustom1:
VisitCustom2:
VisitCustom3:
VisitorCustom1:
VisitorCustom2:
VisitorCustom3:
GroupCustom1:
GroupCustom2:
GroupCustom3:
Mitarbeiter: John Doe
Mitarbeiter-Telefon: 0123 / 123456 / Verkauf



Your visit has been registered

Pin: 42253
Surname: Musterfrau
Name: Marion
Group:
Company: Equitania Software GmbH, Pforzheim
Phone:

This is confirmed with a click on "Yes" yes.

Termin

Daten Termin Einfügen Text formatieren Überprüfen Hilfe Was möchten Sie tun?

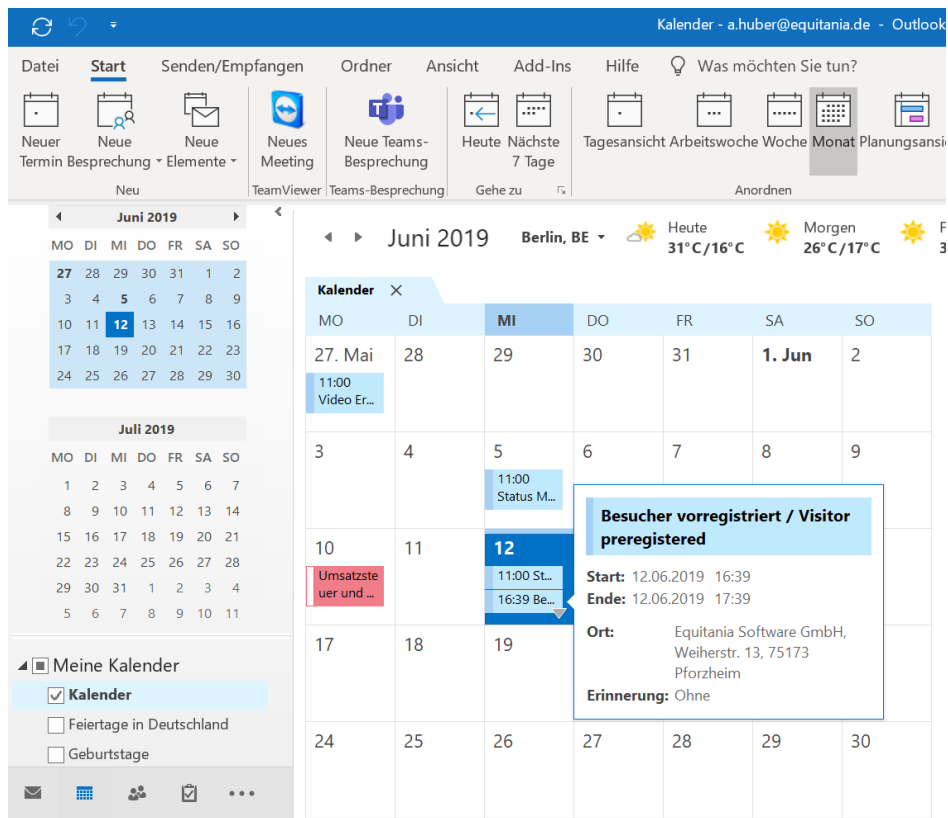
Speichern & schließen Kalender Weiterleiten Terminplanungs-Assistent Online Meeting Teams-Besprechung Teilnehmer einladen Anzeigen als: Gebucht Erinnerung: Ohne Serientyp Zeitzone Kategorien Wichtigkeit: hoch Wichtigkeit: niedrig Kategorien Sprache Customer Manager Insights Verfügbar anzeigen Meine Vorlagen

Dieser Termin verursacht einen Konflikt mit einem anderen Termin in Ihrem Kalender.

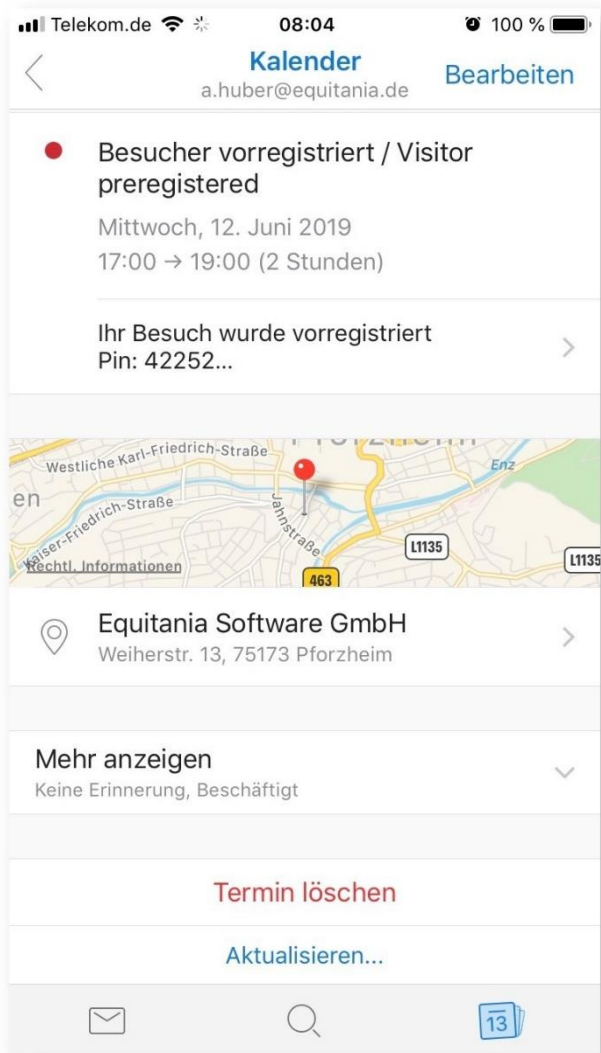
Betreff: Besucher vorregistriert / Visitor preregistered
Ort: Equitania Software GmbH, Weiherstr. 13, 75175 Pforzheim
Beginn: Mi 12.06.2019 16:39 Genüßiges Ereignis
Ende: Mi 12.06.2019 17:39

Ihr Besuch wurde vorregistriert
Pin: 42253
Nachname: Musterfrau
Vorname: Marion
Gruppe:
Firma: Equitania Software GmbH, Pforzheim
Telefon:
Kategorie: Kunde
E-Mail:
KFZ-Nummer:
Bemerkung:
Zufahrt nötig: Nein / No
Einfahrtplaketten Nummer:
Besucherausweis Nummer: 6
Kommt - Datum: 12.06.2019
Kommt - Uhrzeit: 16:39
Wird gehen - Datum: 12.06.2019
Wird gehen - Uhrzeit: 17:39
Von:
Bis:

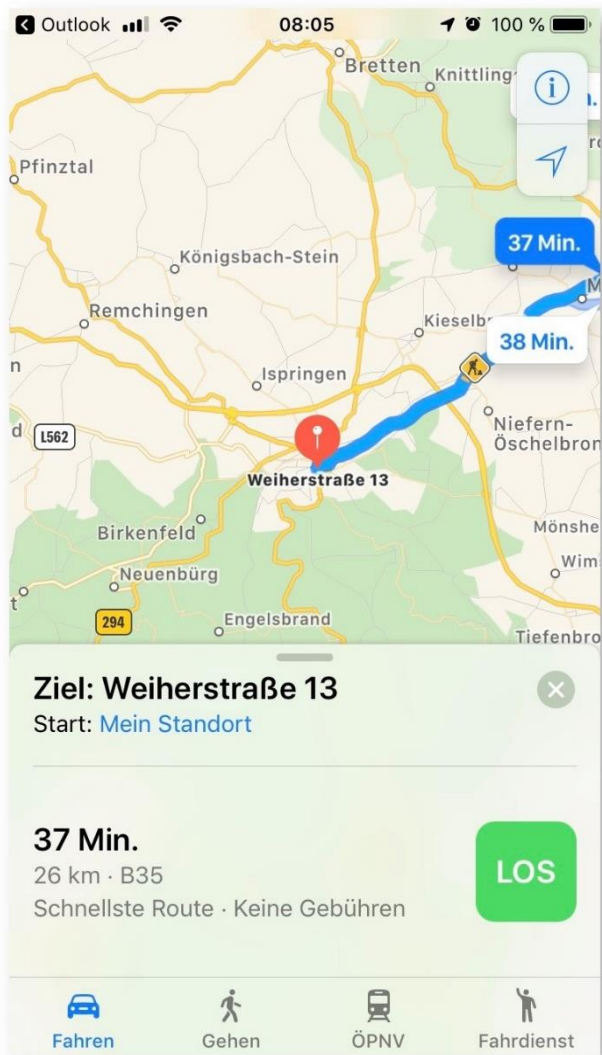
The visitor can now insert the appointment into your calendar in Outlook with "Save & Close".



Visitors who also receive e-mails on their smartphone can directly plan their route to the appointment.



Your visitor can click on the **pin** directly in the appointment.

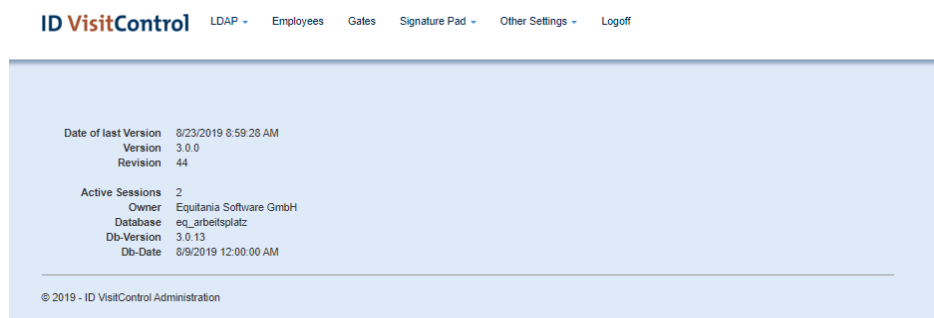


The route planner opens on the smartphone and your visitor only has to click on **LOS** and has little effort to get to the appointment.

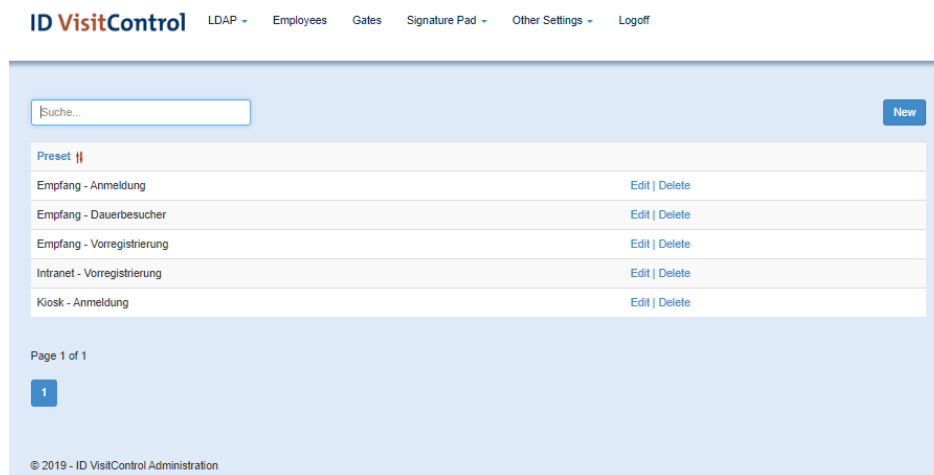
- [Other Settings Email-Settings](#)
- [Other Settings - Email Templates](#)

Create a new email template

In the following we will explain how to create your email templates



First click the **Other Settings** button and then click Email Templates.



If you need another e-mail template, you can click on the **"New"** button.

ID VisitControl LDAP Employees Gates Signature Pad Other Settings Logoff

1

Preset

Empfang - Anmeldung

2

Subject

Ihr Besuch ist angekommen / Your visitor

3

Text

Ihr Besuch ist angekommen und wurde angemeldet

Pin: @visit_id

Nachname: @nachname

Vorname: @vorname

Html Text

<html><meta charset="UTF-8">
<p>Ihr Besuch ist angekommen und wurde angemeldet</p>
<p>
Pin: @visit_id

Nachname: @nachname

4

Location (ics File)

5

Recipient (Pool)

6

BCC

7

External (Mail to visitor)

☐

Internal (Mail to employee)

☒

8

Send email in HTML

☒

9

Available in Empfang

☒

Available in Intranet

☐

Available in Kiosk

☐

10

ICS (Appointment)

☒

11

Report Attachments

office.frx

12

Attachment 1

Datei auswählen

Keine ausgewählt

Attachment 2

Datei auswählen

Keine ausgewählt

Attachment 3

Datei auswählen

Keine ausgewählt

Save

Back

© 2019 - ID VisitControl Administration

Point 1: First enter the name of the template, so that you can assign it later in the other settings exactly for what purpose your template serves.

Point 2: Now define a subject for your e-mail.

Point 3: Which text should your e-mail contain? Decide which information should be included in your e-mail template.

Point 4: Where does the appointment take place? Enter a location, this information will be stored in the date in the location field.

Point 5: If you want this e-mail template to be sent to a specific distribution list, enter an e-mail address here.

Point 6: If you want to add someone to the BCC, enter another e-mail address here.

Point 7: To whom should this e-mail template be sent automatically when the visitor registers? Specify the recipient by ticking the box. In the case of the visitor, the e-mail field will be used as the recipient. For the employee, the e-mail address is taken from the employee's master data.

Point 8: Should the e-mail be sent as HTML? Check this box.

Point 9: In which module should this e-mail template be usable? Specify this by ticking the box.

Point 10: With this check mark you activate the dispatch of an appointment in the e-mail.

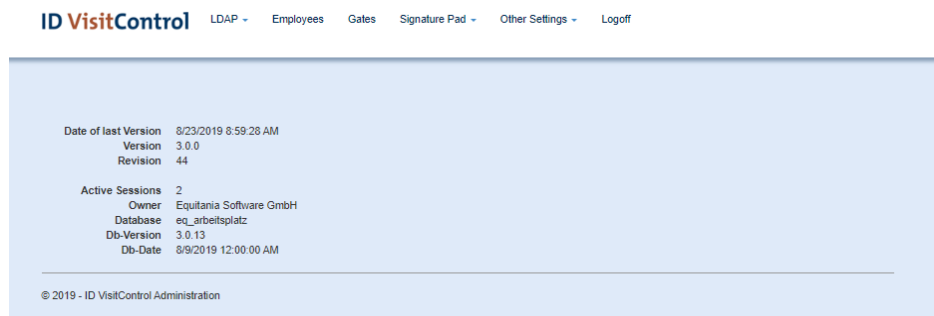
Point 11: In this field you can insert a document which, when sending an e-mail, pulls the corresponding visitor data from the software and is thus personalised for your visitor or for the e-mail recipient.

Point 12: You can attach up to 3 files to your e-mail template. Specify the attachments by selecting the files.

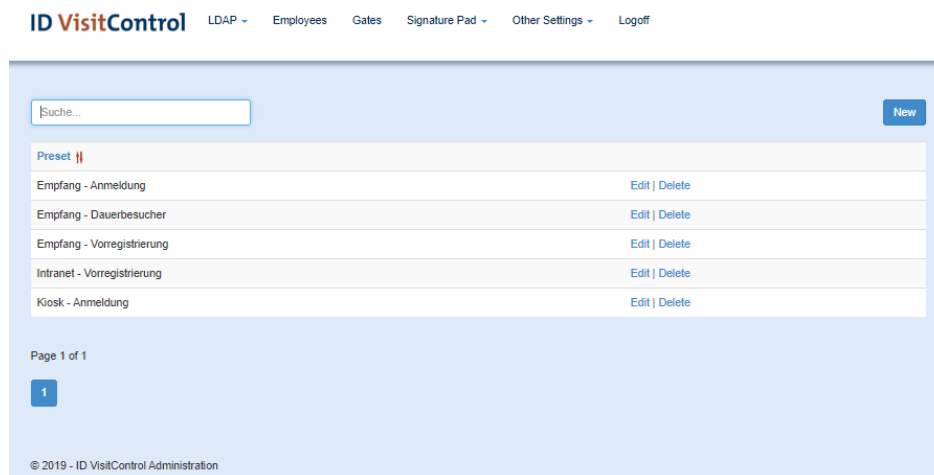
Confirm the entries by clicking on the **Save** button.

Edit email template

In the following we will explain how to edit your email templates.



To edit an email template, click **"Edit"**.



If you need another e-mail template, you can click on the **"New"** button.

Preset

Empfang - Anmeldung

Subject

Ihr Besuch ist angekommen / Your visitor

Text

Ihr Besuch ist angekommen und wurde angemeldet
Pin: @visit_id
Nachname: @nachname
Vorname: @vorname

Html Text

<html><meta charset="UTF-8">
<p>Ihr Besuch ist angekommen und wurde angemeldet</p>
<p>
Pin: @visit_id

Nachname: @nachname

Location (ics File)

Recipient (Pool)

BCC

External (Mail to visitor)

☐

Internal (Mail to employee)

☒

Send email in HTML

☒

Available in Empfang

☒

Available in Intranet

☐

Available in Kiosk

☐

ICS (Appointment)

☒

Report Attachments

office.frx

Attachment 1

Datei auswählen | Keine ausgewählt

Attachment 2

Datei auswählen | Keine ausgewählt

Attachment 3

Datei auswählen | Keine ausgewählt

Save

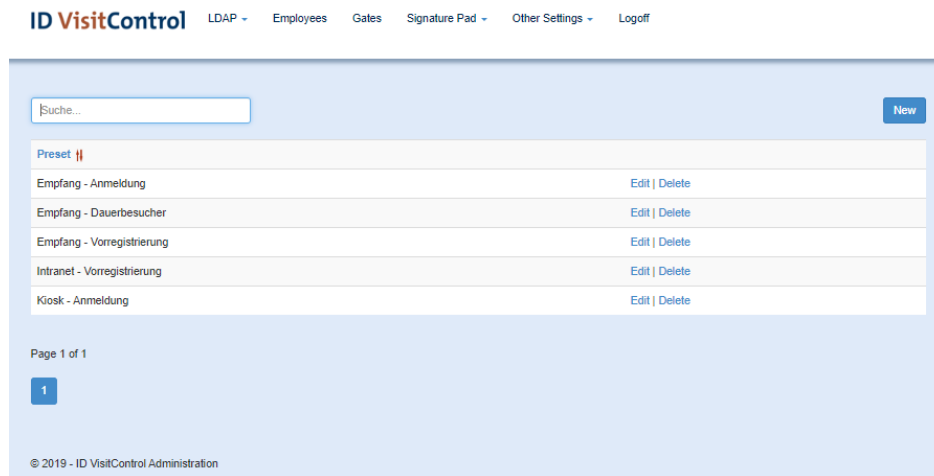
Back

© 2019 - ID VisitControl Administration

You can now change the e-mail template and confirm with **"Save"**.

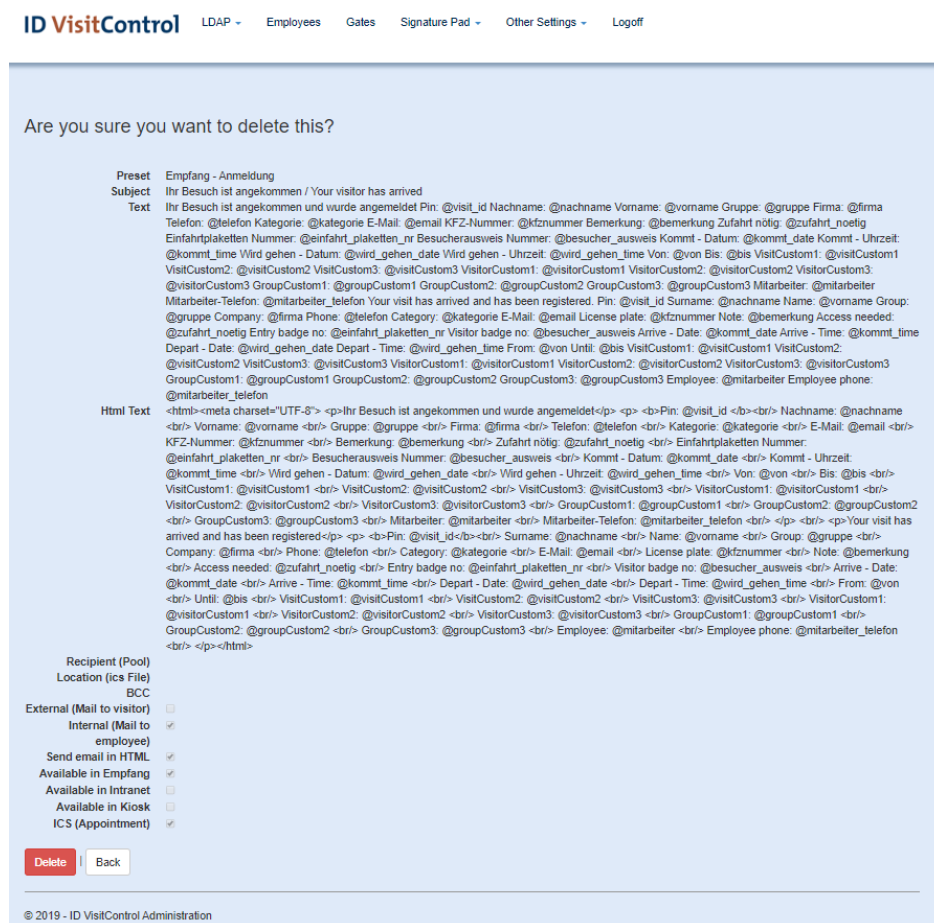
Delete email template

In the following we will explain how to delete your email templates.



To delete an email template, click **Delete**.

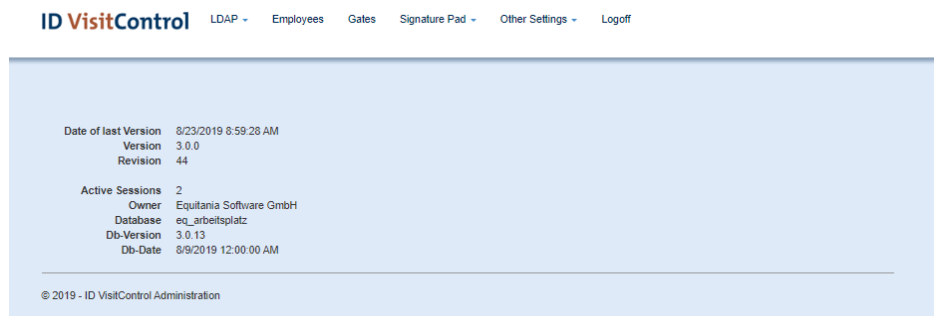
You will now be asked if you really want to delete the e-mail template.



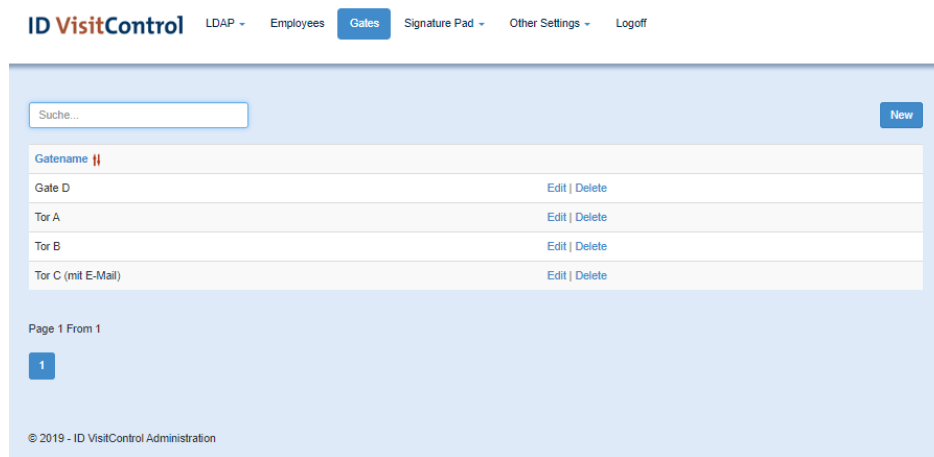
With the confirmation of the deletion, the record is deactivated.

Define e-mail dispatch for gates in administration

In the following, we will explain how you can assign an e-mail template for the individual gates and modules.



First click on the selection field **Gates**.



To edit a gate, click **Edit**.

Gatename

Tor G (mit E-Mail)

Configuration

Empfang

Signaturepad



Webcam



Default Email-Template
(Preregistration)

Empfang - Anmeldung ▼

Default Email-Template
(Sign in)

Empfang - Vorregistrierung ▼

Default Email-Template
(Longterm visitor)

▼

Intranet

Default Email-Template

Intranet - Vorregistrierung ▼

Kiosk

Show infotext



Default Email-Template

Kiosk - Anmeldung ▼

City

Pforzheim

WelcomePage

City

Pforzheim

You can now specify which action will send an e-mail and select a template for it. To do this, click on the drop-down menu and select the desired template.

When you have defined the desired e-mail templates for the respective modules, confirm your entry with **Save**.

E-Mail template in the registration form

You can also use the Office add-on module to display an additional field in your sign-on screen in the reception module and in the intranet module.

The screenshot shows the 'ID VisitControl' registration form with the following details:

- Back** (button) | **ID VisitControl** | Create new visitor (Sign-on) | **Next** (button)
- Surname:*** Behr | **Name:*** Josh
- Company:*** Q Bruckmann, Patzwahl und Jossa, Süd Jontestadt | **Edit company** (button)
- Phone:** (0778) 183838148 | **Category:** (dropdown menu)
- E-Mail:** josh@beckel.com
- License plate:** (input field)
- Comment:** (text area)
- Employee:*** Q John Doe
- Phone/Department:** 0123 / 123456 / Verkauf
- Car Access:** (toggle switch, off) | **WLAN:** (toggle switch, off)
- Arrival time:** 08.10.2019 | 15:18 | **Departure time:** (calendar icon) | (clock icon)
- GDPR:** (toggle switch, on)
- Establish long-term visit** (checkbox)
- From:** (calendar icon) | **Until:** (calendar icon)
- Footer: Home | ID VisitControl | Logged in as: John Doe | Gate: Tor C (mit E-Mail) | © 2019 Equitania Software GmbH

The screenshot shows the 'ID VisitControl' registration form with the 'Arrival time' dropdown menu open, displaying the following options:

- Empfang - Vorregistrierung
- Empfang - Anmeldung
- Empfang - Dauerbesucher

The form contains the same fields as the first screenshot, but the 'Employee:*' field is currently empty and highlighted in red.

Footer: Home | ID VisitControl | Logged in as: John Doe | Gate: Tor C (mit E-Mail) | © 2019 Equitania Software GmbH

Example: Your visitor arrives at the reception desk and is logged in by the staff. You only want to send an e-mail to a specific department or person in certain cases.

This could be the case, for example, if you offer training courses and register a visitor to a training course. To send an e-mail to the person in charge of the training to inform them that there is a participant, you can select the e-mail template "Training" in the registration form and send out an e-mail when the registration is complete.

How to add a new selection field in the mask configuration can be read here:

[Other Settings Mask configuration](#)

Additional Modules - Single-Sign-On

By connecting to your Active Directory, you have created the basis for including the user information of your employees in the visitor software. In addition to the master data synchronization, your employees have the possibility to log in with their Windows access data in the respective module of the software ID VisitControl.

With the module Single-Sign-On you can make the use of the visitor software ID VisitControl even easier for your employees, because when calling up the application an automatic login takes place without entering a new password.

Additional Modules - Signature pad

With the additional module Signature Pad, you can carry out the safety instructions electronically in various languages. This takes place during registration at reception. Your guest is shown a predefined security instruction on a signature pad (Android, iOS or Windows) and asked for a signature.

After the signature has been executed, the signature is displayed to the employee in the visitor management software ID VisitControl Reception and the registration process can be completed.

In the following, we explain in detail how to register your visit using the signature pad at the reception desk.

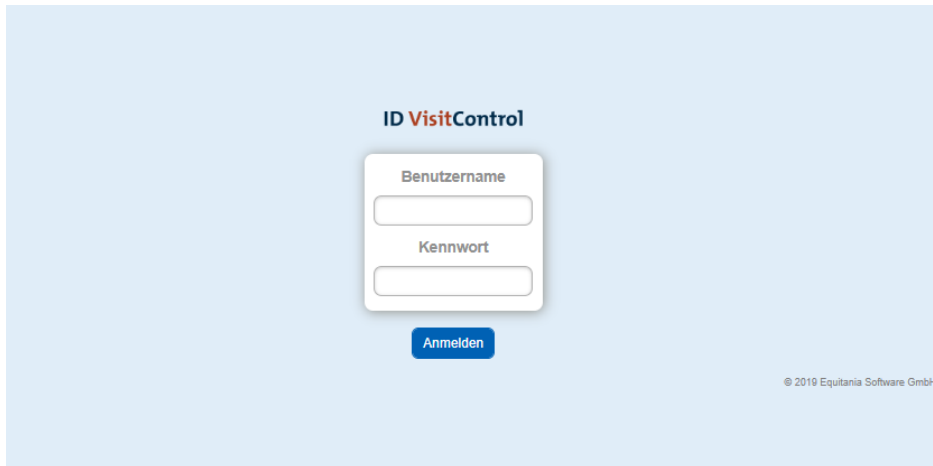
Make sure that you are logged in to the reception module. Read more here:

- [Sign-on and start page in the signature pad](#)
- [Process description of the application with signature interrogation](#)

Sign-on and start page in the signature pad

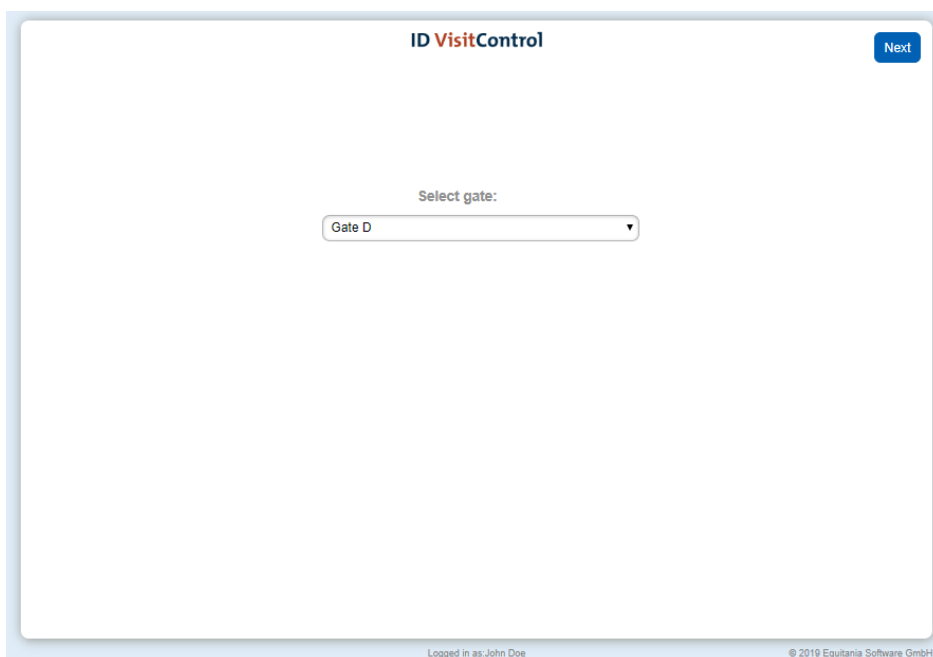
In the following documentation we will explain how to log in to the visitor software ID VisitControl in the additional module Signature Pad.

Now sign-on to the signature pad.



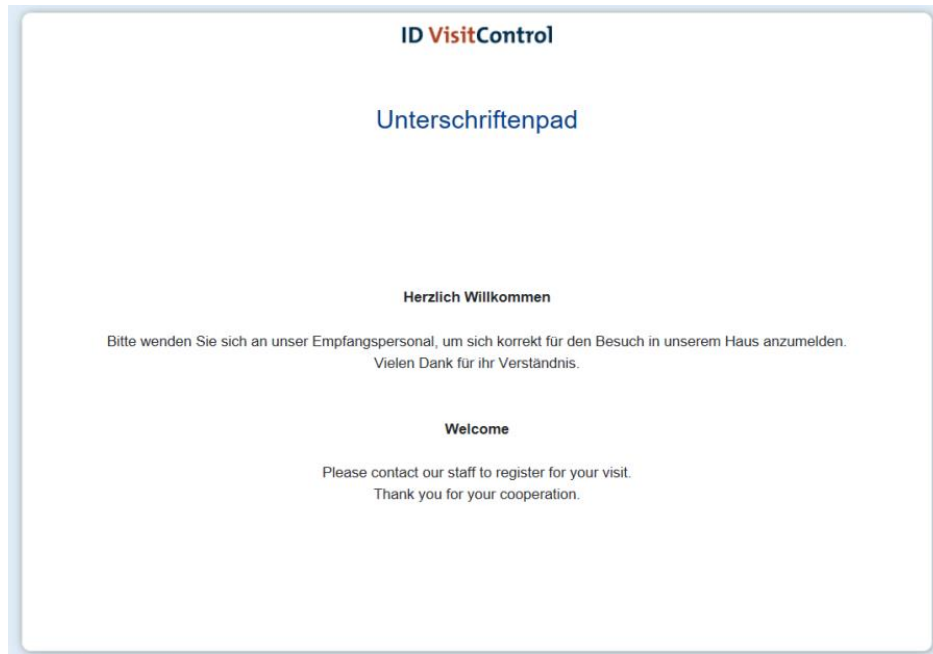
The image shows the login screen for ID VisitControl. It features a light blue background. In the center, there is a white login box with the title "ID VisitControl" in bold. Below the title, there are two input fields: "Benutzername" (Username) and "Kennwort" (Password). Below these fields is a blue button labeled "Anmelden" (Login). In the bottom right corner, there is a small copyright notice: "© 2019 Equitania Software GmbH".

Auf der **Loginmaske** geben Sie bitte Ihren Benutzernamen und Kennwort ein.



The image shows the gate selection screen for ID VisitControl. It features a light blue background. In the center, there is a white box with the title "ID VisitControl" in bold. Below the title, there is a "Select gate:" label and a dropdown menu. The dropdown menu is currently set to "Gate D". In the top right corner, there is a blue button labeled "Next". In the bottom left corner, there is a small text: "Logged in as: John Doe". In the bottom right corner, there is a small copyright notice: "© 2019 Equitania Software GmbH".

Now select the same gate as in the reception module, here "Gate D".



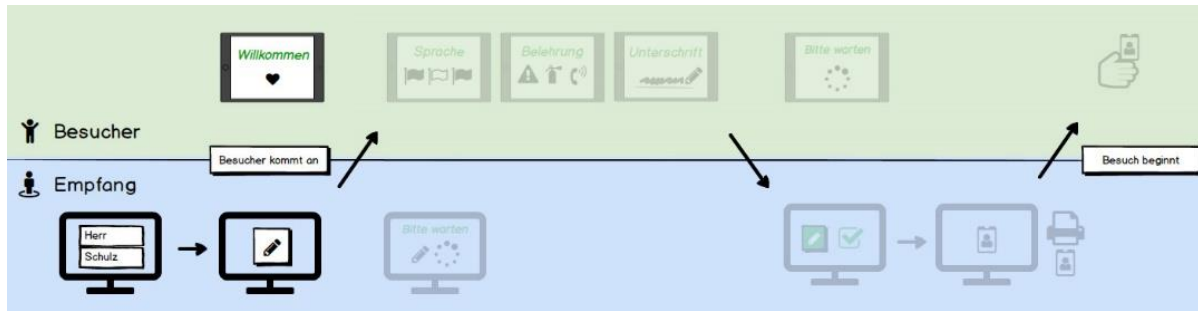
Now you can sign-on in to the reception module.

Process description of the application with signature interrogation

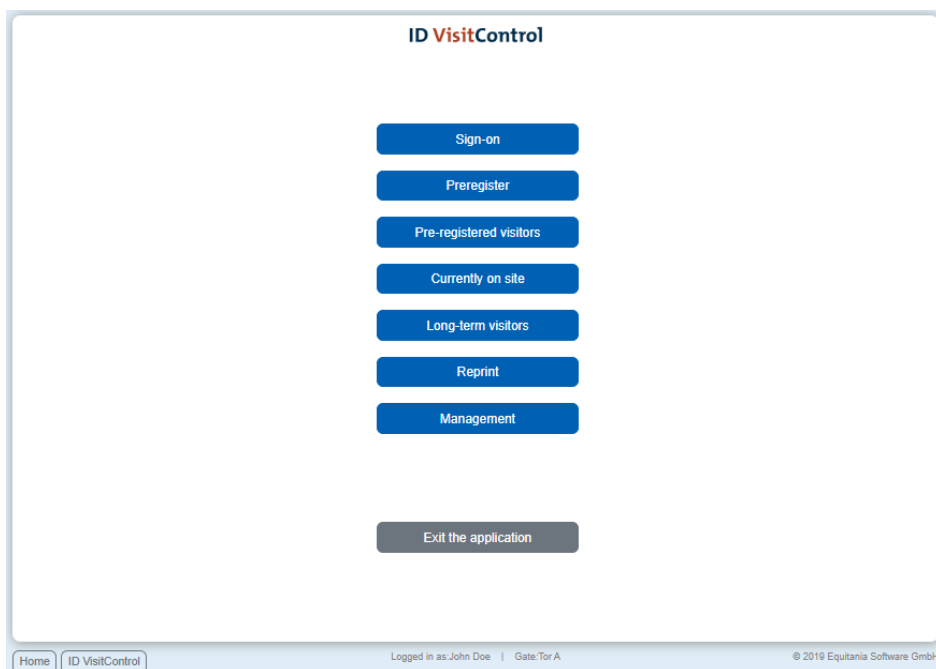
In the following documentation, we explain in detail how to register your visitors, visitor groups and multi-visitors in your visitor management ID VisitControl and how to query a signature for your individual security instruction using a signature pad.

- [Step 1: Registration in the Reception module](#)
- [Step 2: Safety instructions on the signature pad](#)
- [Step 3: Signature verification by the receptionist](#)

Step 1: Registration in the Reception module



In the following documentation, we explain in detail how to register your visitors, visitor groups and multi-visitors in your visitor management ID VisitControl and how to query a signature for your individual security instruction using a signature pad.



First click on the button **Sign-on**.

Here you can now select individual or group visitor registration. In this case, click on the **Single visitor button**. *Multi visitor registration is only available if you have licensed the additional module Multi visitor registration.*

Enter your search term for example "muster" in the field surname / first name / company. To execute the search, simply press the Enter key. If you find something under your searched term, you can click on the button **New visit** to create a new visit with the existing data. If your search does not show any results, click on the button **Create new visit** in the upper right corner.

ID VisitControl
Create new visitor (Sign-on)

Back Next

Surname:* [Red input field] Name:* [Red input field]

Company:* [Red input field with magnifying glass icon] **Add Company**

Phone: [Input field] Category: [Dropdown menu]

E-Mail: [Input field]

License plate: [Input field] Employee:* [Red input field with magnifying glass icon]

Comment: [Text area]

Phone/Department: [Input field]

Car Access: [Toggle switch with 'X'] WLAN: [Toggle switch with 'X']

Arrival time: [Calendar icon] 26.09.2019 [Clock icon] 11:19 Departure time: [Calendar icon] [Clock icon]

GDPR [Toggle switch with 'X']

Establish long-term visit

From: [Calendar icon] Until: [Calendar icon]

Home ID VisitControl Logged in as: John Doe | Gate: Tor A © 2019 Equitania Software GmbH

Here you can fill in the desired fields. The fields marked with a red star * are mandatory. These fields must be filled in. Not filled mandatory fields are marked red.

The input fields "Company" and "Employee" automatically show contents after entering the first letter.

If you click on the **Add company** button, you will be taken to the company administration and can immediately create the new company. After confirming the box, the company is automatically entered in the input field.

ID VisitControl
Company data

Back Confirm

Company:* Test Company

Street: Any Street Number: 1

Postal code: 12345 City:* Any State

Phone: 11111111 Fax: 11111112

E-Mail: testcompany@doe.com Website: testcompany.com

Created: Country: [Dropdown menu]

Home ID VisitControl Logged in as: John Doe | Gate: Tor A © 2019 Equitania Software GmbH

When you have entered all the required information, click on **Confirm** in the top right-hand corner.

Back

ID VisitControl

Create new visitor (Sign-on)

Next

Surname:*

Jane

Name:*

Doe

Company:*

Q Test Company, Any State

Edit company

Phone:

Category:

E-Mail:

License plate:

Employee:*

Q Admin Admin

Comment:

Phone/Department:

Produktion

Car Access:

X

WLAN:

X

Arrival time:

26.09.2019

11:19

Departure time:

Establish long-term visit

GDPR

X

From:

Until:

Home

ID VisitControl

Logged in as: John Doe

Gate: Tor A

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Each visitor can be assigned a permanent visit. This means that the visitor will be displayed in a separate list after he/she has logged out later and you do not have to fill in all the data repeatedly and can simply log in the visitor. Click **Next** to continue.


(You are in the Reception module.)

Zurück

ID VisitControl

Pförtner - Unterschrift kontrollieren

Weiter



Neue Belehrung vorhanden!

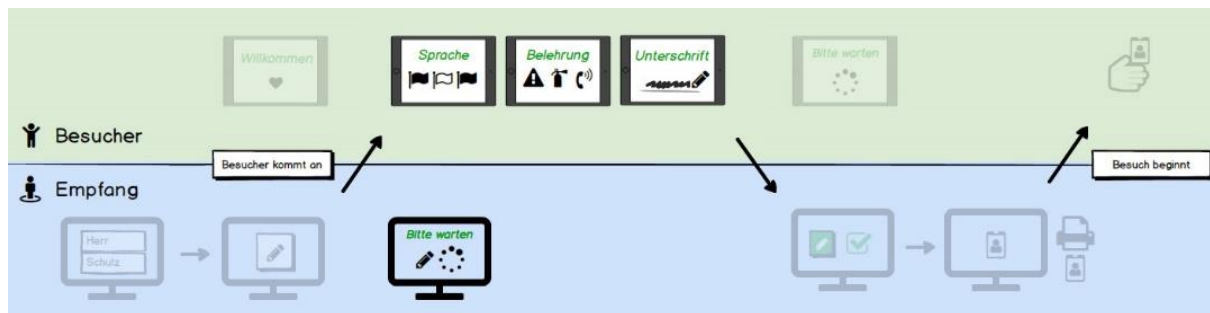
Erneute Unterschrift

A warning will now be displayed in the Reception module that a new safety instruction has been issued and that a signature must be requested from the visitor.

On the signature pad your individual safety instruction opens automatically, which you now present to your guest.

Step 2: Safety instructions on the signature pad

Step 2: Safety instructions on the signature pad



In the following documentation, we explain in detail how to register your visitors, visitor groups and multi-visitors in your visitor management ID VisitControl and how to query a signature for your individual security instruction using a signature pad.

(You are in the signature pad.)



Your visitor first selects the language in which he wants to read the security instruction by clicking on it. Here we choose German.

(You are in the signature pad.)

Zurück

ID VisitControl
 Unterschriftenpad

Weiter

Caption infotext 1 DE

Caption infotext 2 DE

Vorname: Max
 Nachname: Mustermann
 Firma: Musterfirma GmbH

Bitte lesen Sie die Sicherheitsvorschriften durch
und bestätigen diese anschließend mit Ihrer Unterschrift.

Bitte tragen Sie zu Ihrer eigenen Sicherheit und zum Schutz Ihrer Gesundheit
in gekennzeichneten Arbeitsbereichen die entsprechende notwendige Schutzausrüstung.

Im gesamten Verwaltungsbereich und in gekennzeichneten Produktionsbereichen besteht Rauchverbot. Bereiche, in denen Sie rauchen dürfen, sind besonders gekennzeichnet.

Das Mitbringen und der Genuss von alkoholischen Getränken bzw. sonstigen berauschenden Mitteln sind untersagt. Das Betriebsgelände darf auch nicht in betrunkenem oder angetrunkenem Zustand sowie unter dem Einfluss von Drogen betreten werden.

Das Betätigen und die Ingangsetzung von Maschinen und Anlagen ist verboten.

Fotografieren bzw. Filmen ist auf dem gesamten Betriebsgelände nur nach Absprache gestattet.

Parken ist nur auf den mit "Besucher" gekennzeichneten Flächen vor dem Hauptverwaltungsgebäude gestattet.

Eine Schadenersatzpflicht von Firma XY besteht nur für Ansprüche, die durch die Betriebshaftpflichtversicherung gedeckt sind.

Continue with "**Continue**".
(You are in the signature pad.)

Zurück

ID VisitControl
 Unterschriftenpad

Weiter

Caption infotext 1 DE

Caption infotext 2 DE

Vorname: Max
 Nachname: Mustermann
 Firma: Musterfirma GmbH

Beachten Sie bitte den innerbetrieblichen Transport mit Flurförderzeugen, besonders an **Kreuzungen** und **schlecht einsehbaren Stellen**.

Beachten Sie bitte den innerbetrieblichen Transport mit Kranen. Der Aufenthalt unter **schwebender Last** ist verboten.

Vermeiden Sie direkten Blick in den Lichtbogen von Schweißarbeiten. Es besteht die Gefahr des **Verblitzens der Augen**.

Beachten Sie bitte, dass in Bereichen mit **explosionsgefährlicher Atmosphäre** das Benutzen von nicht **EXgeschützten Geräten** verboten ist.

Home
ID VisitControl
Angemeldet als: Admin Admin | In Pforte: Tor B
© 2018 Equitania Software GmbH

Continue with "**Continue**".
(You are in the signature pad.)

Zurück

ID VisitControl
Unterschriftenpad

Weiter

Caption infotext 1 DE

Vorname: Max
Nachname: Mustermann
Firma: Musterfirma GmbH

Caption infotext 2 DE

 Sollten Sie sich verletzen, informieren Sie umgehend Ihren Ansprechpartner. Der Ansprechpartner veranlasst die Erste-Hilfe-Leistungen durch einen Ersthelfer.

 Neben dem Verbandmaterial steht im Sanitätsraum auch ein automatischer externer Defibrillator (AED) zur Verfügung.

 Im Alarmfall und bei Gebäuderäumungen suchen Sie sofort den Sammelplatz vor dem Hauptverwaltungsgebäude auf. Folgen Sie der Fluchtwegekennzeichnung wie im Beispiel dargestellt.

 Warnen Sie gefährdete Personen und nehmen Sie hilflose Personen mit.

Continue with **"Continue"**.
(You are in the signature pad.)

Zurück

ID VisitControl
Unterschriftenpad

Weiter

Caption infotext 1 DE

Vorname: Max
Nachname: Mustermann
Firma: Musterfirma GmbH

Caption infotext 2 DE

 Brand / Notfall melden,
Ruhe bewahren

 **112 Notruf** (Brand, Unfall, Rettungsdienst)
(via Telefonanlage)

Wichtige Angaben beim Notruf:
Wo geschah es?
Was geschah?
Wie viele Verletzte?
Welche Verletzungen?
Warten auf Rückfragen.

Weitere wichtige interne Durchwahlrufnummern:
?? Ersthelfer (Koordinator Erste-Hilfe)
?? Ersthelfer
?? Zentrale/Empfang
(von externen Telefonen oder Handy: [07041 – 99 99](tel:07041-9999) + Durchwahl)

Continue with **"Continue"**.
(You are in the signature pad.)

Zurück

ID VisitControl
 Unterschriftenpad - DONE

Fertig

Last page infotext 1 - DE
 Vorname: Max
 Nachname: Mustermann
 Firma: Musterfirma GmbH

Last page infotext 2 - DE

Ort: Pforzheim
 Datum: 22.11.2018

Unterschriftenpad leeren

Your visitor must now confirm the previous instruction text with his signature.

(You are in the signature pad.)

Zurück

ID VisitControl
 Unterschriftenpad - DONE

Fertig

Last page infotext 1 - DE
 Vorname: Max
 Nachname: Mustermann
 Firma: Musterfirma GmbH

Last page infotext 2 - DE

Max Mustermann

Ort: Pforzheim
 Datum: 22.11.2018

Unterschriftenpad leeren

It is possible to repeat the signature by tapping on "Empty signature pad".
 If the signature is correct, you can confirm with **"Done"**.
(You are in the signature pad.)

ID VisitControl

Unterschriftenpad - DONE

Last page infotext 1 - DE

Vorname: Max
Nachname: Mustermann
Firma: Musterfirma GmbH

Last page infotext 2 - DE

Danke, Ihre Unterschrift wird jetzt kontrolliert.

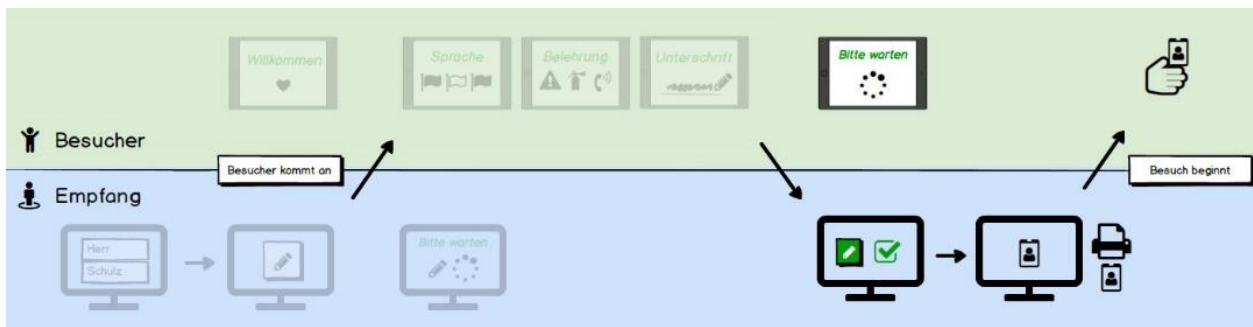
Ort:
Pforzheim

Datum:
22.11.2018

The signature is now automatically displayed in the Reception module and can be verified by the reception staff.

Step 3: Signature verification by the receptionist

Step 3: Signature verification by the receptionist

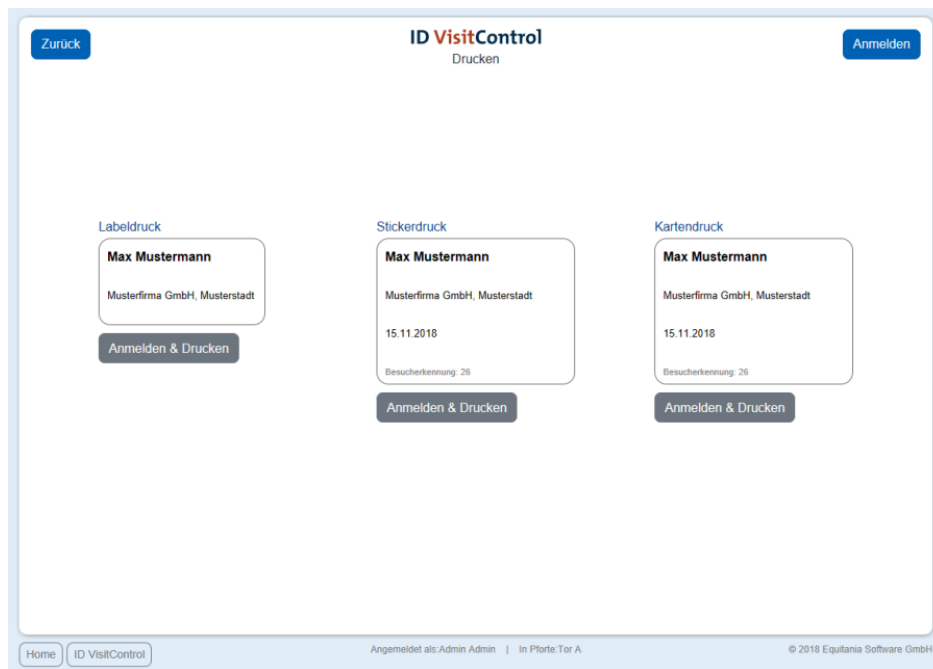


In the following documentation, we explain in detail how to register your visitors, visitor groups and multi-visitors in your visitor management ID VisitControl and how to query a signature for your individual security instruction using a signature pad.

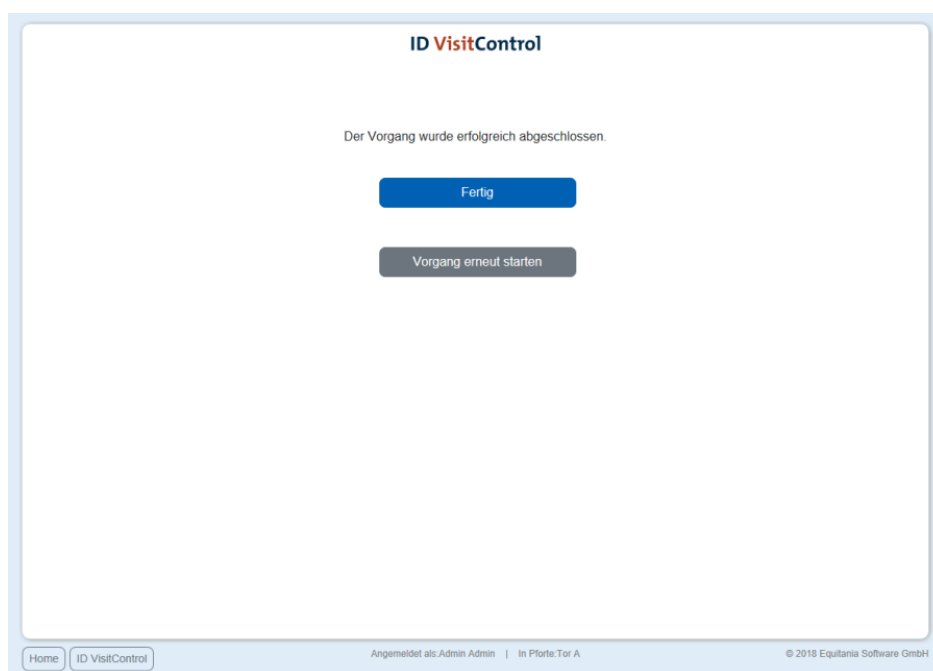
(You are in the Reception module.)

The screenshot shows the ID VisitControl interface for the Reception module. At the top, there are buttons for 'Zurück' (Back) and 'Weiter' (Next). The main heading is 'ID VisitControl' with the subtitle 'Pförtner - Unterschrift kontrollieren'. Below this, there is a large exclamation mark icon and the text 'Neue Belehrung vorhanden!' (New instruction available!). At the bottom, there is a signature field with the text 'Max Mustermann' and a button labeled 'Erneute Unterschrift' (Renew signature).

The receptionist now has the possibility to query the signature again if it is not correct. Click on "**Renew signature**" here.
Click the **Continue** button to go to the label selection page.



Here you can select the appropriate badge. Click on the button **Registration&Print** to register the visitor and print the badge at the same time. You can also just register the visitor. Click the Login button in the upper right corner. The registration was successful and the visitor is now automatically in your visit list.



Now you have the possibility to get to the main menu via the button **Done** or to start a **New registration**.

Additional Modules - Webcam

With the additional module Webcam, you can directly take a picture of your visitor in the course of the registration process.

This photo can then be printed on the visitor badge.

You should make sure that this additional module does not work with every browser. Common browsers such as Microsoft Edge, Mozilla Firefox or Google Chrome, for example, allow smooth use.

In addition, the Webcam add-on module only works if you have an SSL certificate. This means that you must have <https://> in front of your IP address.

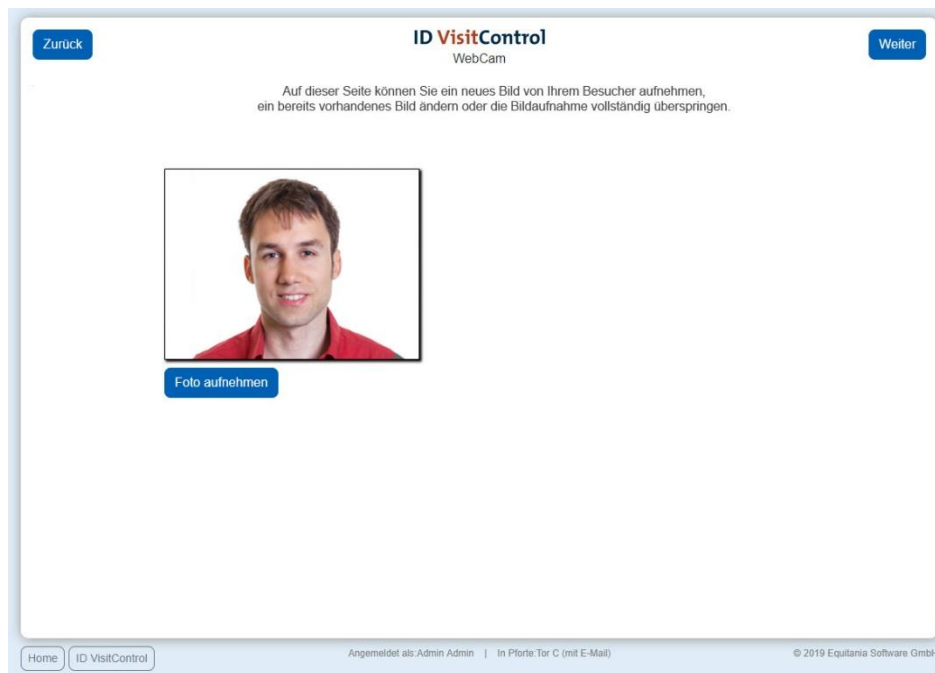
In the following we will explain how to proceed with the Webcam add-on module.

Register your [visitor at the reception](#) as usual.

The screenshot shows the 'ID VisitControl' registration interface. At the top, it says 'Create new visitor (Sign-on)'. The form is divided into two columns. The left column contains fields for 'Surname:*' (filled with 'Jane'), 'Company:*' (filled with 'Q. Test Company, Any State'), 'Phone:', 'E-Mail:', 'License plate:', 'Comment:', 'Arrival time:' (with a date picker set to '26.09.2019' and a time picker set to '11:19'), and 'From:' (with a date picker). The right column contains fields for 'Name:*' (filled with 'Doe'), 'Category:' (a dropdown menu), 'Employee:*' (filled with 'Q. Admin Admin'), 'Phone/Department:' (filled with 'Produktion'), 'Car Access:' (a toggle switch), 'WLAN:' (a toggle switch), 'Departure time:' (with a date and time picker), and 'Until:' (with a date picker). At the bottom right, there is a 'GDPR' toggle switch. A 'Back' button is in the top left and a 'Next' button is in the top right. The footer includes 'Home', 'ID VisitControl', 'Logged in as: John Doe | Gate: Tor A', and '© 2019 Equitania Software GmbH'.

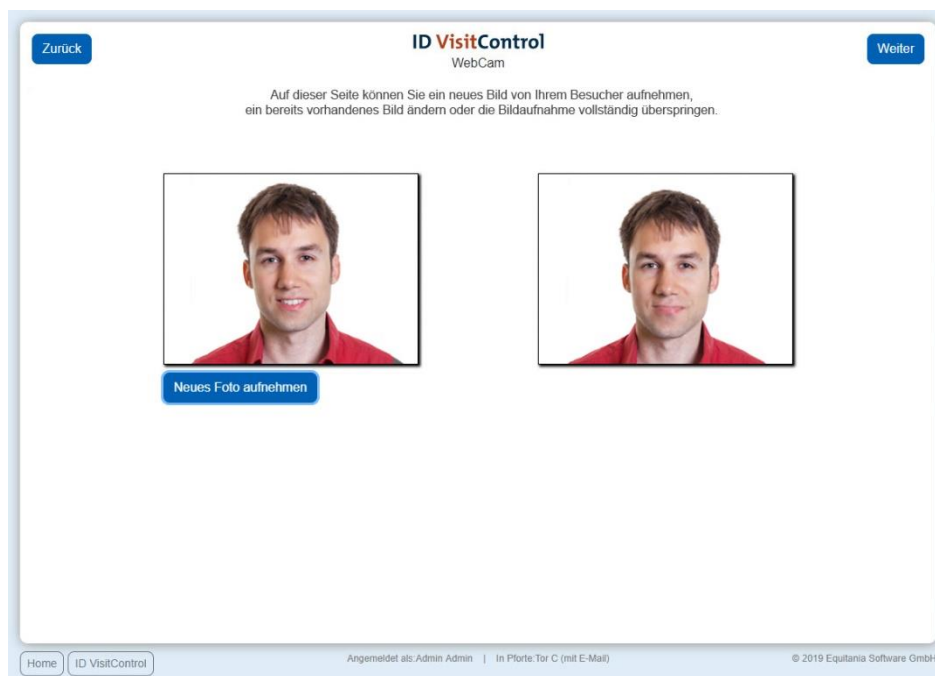
Click the **Continue** button to go to the WebCam page.

This page is only available to you if you have licensed the Webcam add-on module.



Now you can take a picture of your visitor by clicking on the button **Take photo**.

With the button **Continue** you get to the next WebCam page.



Here you have the possibility to take the photo again. To do this, click on the **Take new photo** button.

If you are satisfied with the photo, click on the **Continue** button to go to the label selection page.

Back ID VisitControl Print Register

Labelprint

Doe Jane

Test Company, Any State

Register & print

Stickerprint

Doe Jane

Test Company, Any State

26.09.2019

VisitorNo: 3

Register & print

Cardprint

Doe Jane

Test Company, Any State

26.09.2019

VisitorNo: 3

Register & print

Home ID VisitControl Logged in as: John Doe | Gate: Tor A © 2019 Equitania Software GmbH

You can select the appropriate badge here. Click on the button **Register&Print** to register the visitor and print the badge at the same time. You can also just register the visitor. Click the **Register** button in the upper right corner. The registration was successful and the visitor is now automatically in your visit list.

ID VisitControl

The registration was successful

Done

Next registration

Home ID VisitControl Logged in as: John Doe | Gate: Tor A © 2019 Equitania Software GmbH

You now have the option of using the **Done** button to go to the main menu or directly restart a process by clicking the Button **Next registration**.