



# VisitorOS

## Kiosk Backend, Portal and Configuration Overview

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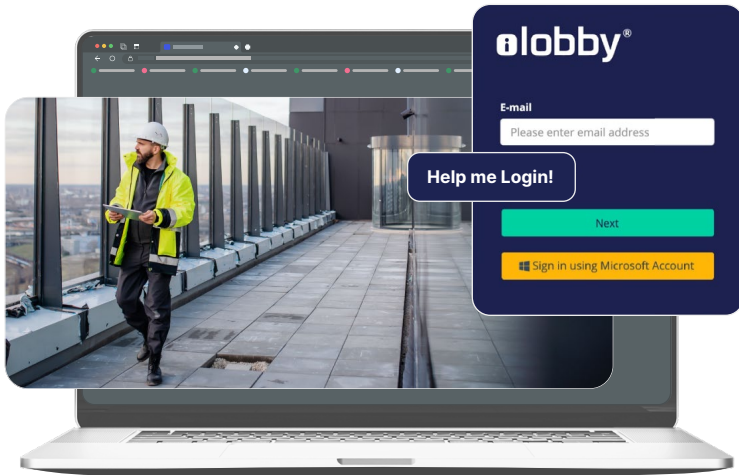
**Tooltip:**

The VisitorOS module enables you to keep track of everyone coming in and out of your facility.

# Overview

This guide will walk you through how to configure your VisitorOS system to function in a way that works seamlessly with your facility. The VisitorOS portal also acts as a cloud-based server that saves all of your visitor information and keeps it all at your fingertips.

To get started, visit the iLobby Portal: [portal.goilobby.com](https://portal.goilobby.com).

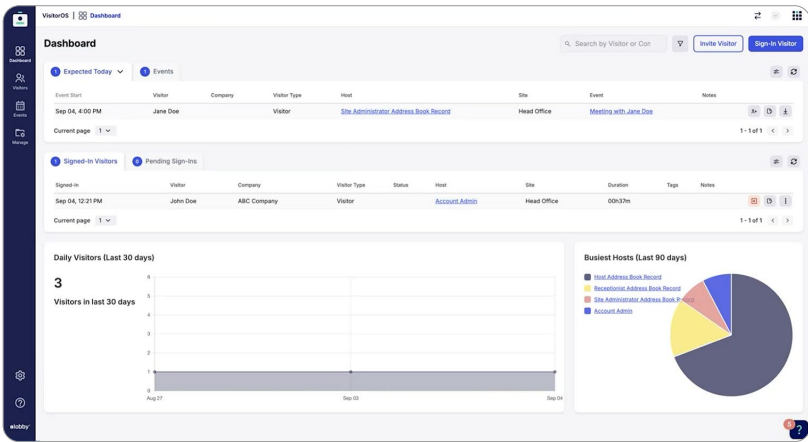


You must create an account in order for you to log in; navigate to the "help me log in" button and follow the steps provided. **Please note: your team must have already added your email in their address book or user records prior to creating your account**

Once you have created your account, you may login. Depending on your permissions, you will have access to a multitude of different features within the portal.

# Dashboard

The “**Dashboard**” is the heart of the iLobby portal and it’s the first place you will land upon signing in. Here, you can see everything going on at your site today, the last 30 days in terms of your visitors, and the last 90 days for hosts in your address book.



Certain individuals will be able to sign in visitors via the dashboard, which comes down to their permission level.



To sign in a visitor, navigate to the large blue button on the right side of the screen that says “**Sign-In Visitor**”. This will allow you to sign in a visitor, or sign in yourself if you and your team are using Employee Passes.

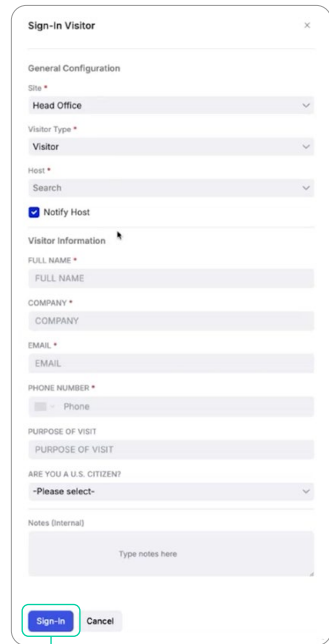


### Tooltip:

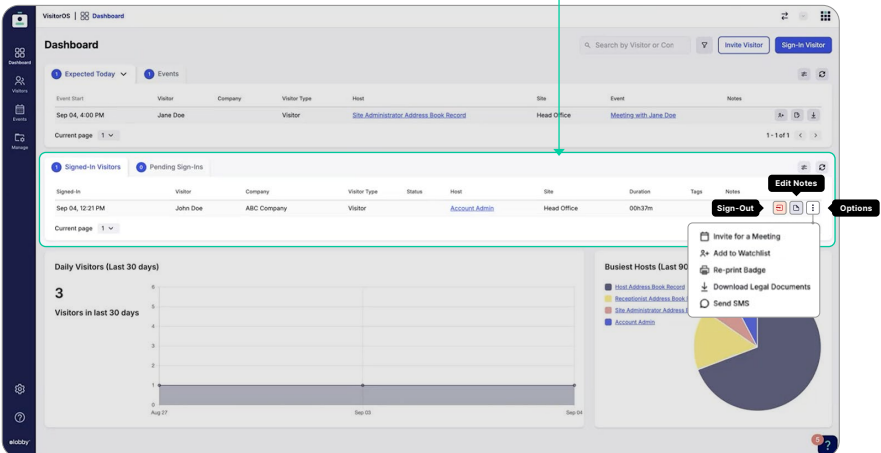
Your organization must add the users email in the address book or user records first in order to be able to create an account.

Click the action you would like to perform and follow the prompts. **Please be sure to fill in all information with an asterisk beside it. This means that this information is REQUIRED to complete an invite or sign-in.**

Once an individual has been signed in, there are multiple things that you can do with their visitor record. When you see them displayed in the **“Signed-in Visitors”** section of the dashboard, click the 3 dots on the far right side of the listing.



The image shows a 'Sign-in Visitor' modal form. It is divided into several sections: 'General Configuration' with dropdowns for Site (Head Office), Visitor Type (Visitor), and Host (Search); a 'Notify Host' checkbox which is checked; 'Visitor Information' with input fields for Full Name, Company, Email, and Phone Number; a 'Purpose of Visit' dropdown; and a 'ARE YOU A U.S. CITIZEN?' dropdown set to '-Please select-'. At the bottom, there is a 'Notes (Internal)' text area and two buttons: 'Sign-in' (highlighted with a red box) and 'Cancel'.



The image shows a screenshot of the VisitorOS Dashboard. A red box highlights the 'Sign-in' button in the modal from the previous image, with a red arrow pointing to the 'Signed-in Visitors' table. The table has columns for Signed In, Visitor, Company, Visitor Type, Status, Host, Site, Duration, Tags, and Notes. A row for John Doe is highlighted. A red box highlights the three-dot menu icon on the right of the row. A red arrow points from this icon to a dropdown menu with options: 'Invite for a Meeting', 'Add to Watchlist', 'Re-print Badge', 'Download Legal Documents', and 'Send SMS'. Other annotations include a red box around the 'Edit Notes' button and a red box around the 'Options' button.

Depending on your enabled features, you will be able to invite them for a future meeting, re-print a visitor badge, add to a watchlist, sign out, edit visitor details, or download legal documents. Now, let's navigate over to the **“Visitors”** tab.

# Visitors

The Visitors tab is an overview of everyone that has been at your site since it was created. This information is managed by you and cannot be deleted by iLobby unless specifically requested.

Photo	Visitor	Host	Site	Sign-In	Sign-Out	Duration	Signed-In Via	Tags
	John Doe ABC Company	Account Admin	Head Office	Sep 04, 12:21 PM			Portal	Visitor
	Jane Doe Fresh Company	Account Admin	Head Office	Sep 03, 10:42 AM	Sep 03, 10:42 PM Signed out by system	NIA	Kiosk	Visitor, Non-U.S. Citizen
	John Doe ABC Company	Host Address Book Record	Head Office	Aug 27, 9:02 AM	Aug 27, 9:02 PM Signed out by system	NIA	Kiosk	Contractor, U.S. Citizen

**Filter**

New Filter Saved Filters

Site  
-Please select-

Sign-In  
Start - End

Visitor Type  
-Please select-

Host Name  
Host Name

Visitor Name  
Visitor Name

Company Name  
Company Name

Tag  
Tag

Notes  
Notes

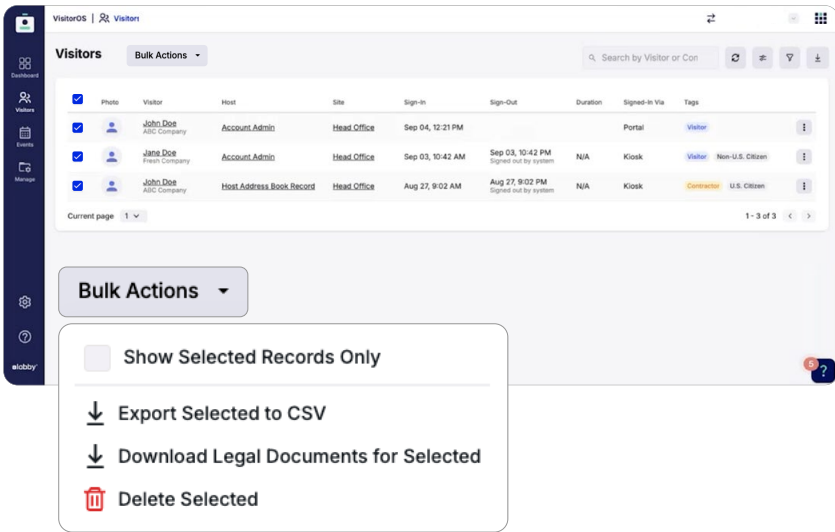
Custom Field  
-Please select-

Apply Filter Save Filter Reset to Default

To find a specific visitor, use the search bar at the top right of the screen— please enter any keywords that apply to the visitor you are searching for (such as their name or email.).

The **“filter”** tool allows you to search for visitors using a multitude of options. Once the desired filters have been added, click **“Apply Filter”** and all visitors that apply to those parameters will be visible.

To select the visitors, click on the check boxes to select them 1 by 1 or all at once. Once this has been done, you'll have a few options for what to do with the records. Click **"Bulk Actions"** on the top left side of the screen and you can export the visitor logs into a .CSV file to access the list easily.



The screenshot shows the VisitorOS interface with a table of visitor records. The table has columns for Photo, Visitor, Host, Site, Sign-In, Sign-Out, Duration, Signed-In Via, and Tags. Three records are visible, each with a checked checkbox in the first column. Below the table, a 'Bulk Actions' dropdown menu is open, showing options: 'Show Selected Records Only', 'Export Selected to CSV', 'Download Legal Documents for Selected', and 'Delete Selected'.

Photo	Visitor	Host	Site	Sign-In	Sign-Out	Duration	Signed-In Via	Tags
<input checked="" type="checkbox"/>	John Doe ABC Company	Account Admin	Head Office	Sep 04, 12:21 PM			Portal	Visitor
<input checked="" type="checkbox"/>	Jane Doe Fresh Company	Account Admin	Head Office	Sep 03, 10:42 AM	Sep 03, 10:42 PM Signed out by system	N/A	Kiosk	Visitor Non-U.S. Citizen
<input checked="" type="checkbox"/>	John Doe ABC Company	Host Address Book Record	Head Office	Aug 27, 9:02 AM	Aug 27, 9:02 PM Signed out by system	N/A	Kiosk	Contractor U.S. Citizen

Current page 1 | 1-3 of 3

**Bulk Actions**

- Show Selected Records Only
- ↓ Export Selected to CSV
- ↓ Download Legal Documents for Selected
- 🗑 Delete Selected

You can also download all legal documents pertaining to these visitor sign ins (NDAs, covid screening, or any other documents that have been made applicable to these visitors). Or if you wish, you can delete the selected entries entirely.

This concludes the **"Visitors"** tab. Next, let's continue by navigating to the **"Events"** tab.



**Tooltip:**

Certain actions are dependant on what permissions are granted by the account admin.

# Events

In the “Events” tab, you will have the same search abilities as the “Visitors” tab.

The screenshot displays the 'Events' tab in the VisitorOS interface. The main area contains a table with the following columns: Event Name, Start Date, End Date, Host, Site, Attended, and Invited. The table lists various events such as 'Meeting with Jane Doe', 'Contractor Visit', and 'New Event'. An 'Invite Visitor' modal is overlaid on the right side of the table. The modal has a title 'Invite Visitor' and a close button. Below the title, there is a section for 'Event Details' with the following fields: 'Start Time' (Sep 11, 2024, 1:00 PM), 'End Time' (Sep 11, 2024, 2:00 PM), and 'Site' (Please select-). At the bottom of the modal, there are two buttons: 'Invite' and 'Cancel'.

Event Name	Start Date	End Date	Host	Site	Attended	Invited
Meeting with Jane Doe	Sep 04, 2024, 4:00 PM	Sep 04, 2024, 5:00 PM	Site Administrator Address Book Record	Head Office	0	1
Meeting with Site Admin	Sep 03, 2024, 12:00 PM	Sep 03, 2024, 1:00 PM	Site Administrator Address Book Record	Head Office	0	1
Contractor Visit	Aug 28, 2024, 11:00 AM	Aug 28, 2024, 12:00 PM	Host Address Book Record	Head Office	0	1
Meeting with Jane Doe	Aug 27, 2024, 10:00 AM	Aug 27, 2024, 12:00 PM	Host Address Book Record	Head Office	0	1
Brand New Event	Jul 16, 2024, 9:00 AM	Jul 16, 2024, 10:00 AM	Host Address Book Record	Head Office	0	1
Demo Meeting with Monica Geller	Jul 11, 2024, 10:00 AM	Jul 11, 2024, 11:00 AM	Host Address Book Record	Head Office	0	1
Summer BBQ	Jul 04, 2024, 12:00 PM	Jul 04, 2024, 2:00 PM	Host Address Book Record	Head Office	0	1
Meeting with Monica Geller	Jun 27, 2024, 11:00 AM	Jun 27, 2024, 12:00 PM	Site Administrator Address Book Record	Head Office	0	1
Meeting with Jessica Day	Jun 20, 2024, 9:00 AM	Jun 20, 2024, 1:00 PM				
Meeting with Ross Geller	Jun 18, 2024, 3:00 PM	Jun 18, 2024, 4:00 PM				
Meeting with Phoebe Buffay	Jun 13, 2024, 11:00 AM	Jun 13, 2024, 12:00 PM				
New Event	May 22, 2024, 9:00 AM	May 22, 2024, 11:59 PM				
Meeting with Jane Doe	May 16, 2024, 12:00 PM	May 16, 2024, 1:00 PM				
Interviews with Jessica	May 10, 2024, 9:00 AM	May 10, 2024, 10:00 AM				
Meeting with Michael Jordan	May 14, 2024, 10:00 AM	May 14, 2024, 11:00 AM				
demo event	May 14, 2024, 9:00 AM	May 14, 2024, 11:59 PM				
Interviews with Jessica	May 10, 2024, 9:00 AM	May 10, 2024, 10:00 AM				
new event	May 08, 2024, 9:00 AM	May 17, 2024, 11:59 PM				
Meeting with Test Sign In	May 07, 2024, 10:00 AM	May 07, 2024, 11:00 AM				
new event	May 07, 2024, 9:00 AM	May 07, 2024, 11:59 PM				

Additionally, the “Events” tab is where you can invite multiple people to your site at once, unlike the “Dashboard” or “Visitors” tabs where invites are based on one visitor at a time.

The screenshot shows the search bar and action buttons in the Events tab. The search bar contains the text "Search by Visitor or Contact Name". To the right of the search bar are three icons: a refresh icon, a filter icon, and a download icon. Further right are two buttons: "Invite Visitor" and "Add New Event".

To invite multiple people to your site at once, you must first create an event. To create an event, navigate to the blue button on the side of the screen that says “New” and then “New Event”. Here, you will need to fill out every data field with an asterisk beside it.



Once the details have been specified for your event, click the blue **“save”** button at the top of the page, and save the event. Then, navigate back to the **“Events”** page and your new event will be displayed at the top of the list.

Click on your new event and here you can invite people either one by one or all at once by clicking the **“invite”** button and typing their information manually or importing a list of guests via .CSV file.

We’re all done with the **“Events”** tab. Let’s navigate to the **“Manage”** icon to find the menu with our next destination: the **“Address Book”**. Click on the menu item to view.

The screenshot shows a form for creating an event. It includes fields for Event Name, Site, Host, Visitor Type, Start Time, and End Time. There are also checkboxes for 'All Day Event', 'Multi-Day or Recurring Event', 'Allow Early Sign-in', 'Send Summary Report', and 'Suppress Sign-in Notifications'. A text area is provided for 'Instructions for Guest'.

The screenshot shows a table titled 'Event Guests' with columns for Guest, Email, and Pre-Registration Status. There are buttons for 'Export Invitations to PDF', 'Import from CSV', and 'Invite Guest'. A table row shows 'Jane Doe' with email 'janedoe@demo.com' and status 'Incomplete'. There are also pagination controls for 'Current page' and '1 - 1 of 1'.

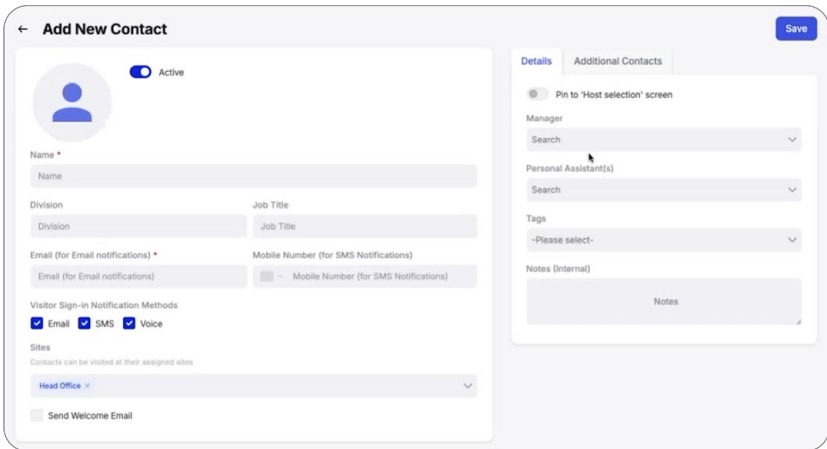
# Address Book

The **“Address Book”** contains a list of hosts that visitors can choose to visit on sign-in at the VisitorOS kiosk.

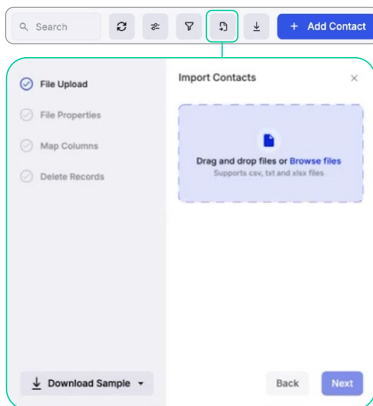
The screenshot shows the 'Address Book' interface with a search bar and a table of hosts. The table has columns for Name, Email, Phone, Sites, Tags, and Notes. There are four rows of host records, each with a red 'X' icon in the Notes column.

Name	Email	Phone	Sites	Tags	Notes
Account Admin	admin@training.com		Head Office		
Host Address Book Record	host@training.com		Head Office		
Receptionist Address Book Record	receptionist@training.com		Head Office		
Site Administrator Address Book Record	siteadmin@training.com		Head Office		

These hosts must be in the address book as contacts and can either be entered manually or imported via .csv file. If you're uploading a new contact in the address book manually, click on the blue button on the right side of the screen that says, **"Add Contact"**. Fill out the required information and save the contact.



To import contacts via a .CSV file, click the **"Import"** icon on the same row as the **"Add Contact"** button. Please make sure that that your .CSV includes a column for first name, last name and email, as these are mandatory fields.



Once you have made a properly formatted .CSV file, browse and drop the file into the file import window. Follow the prompts and your address book will then be imported via .CSV file.

Now that we've covered the **"Address Book"**, we can review some additional settings.

# Additional Settings

Depending on your account access level, you will have the ability to see a variety of additional settings and options to continue to customize your VisitorOS portal experience.



## Settings

- Sites
- Users
- Roles



## Manage

- Address Book
- Documents
- Watchlist
- Devices
- Global Messaging



## Resource Center

- Announcements
- Help Center
- Technical Support
- Share Your Feedback



### Address Book

List of all known employees and visitors that have been added to the system.



### Devices

See the live status of all currently connected devices assigned at a location or site.



### Documents

Upload documents for review or training during visitor sign-in or pre-registration.



### Global Messaging

Broadcast messages or alerts to all contacts in the address book instantly (account administrators only).



### Watchlist

Grants the ability to prevent certain users from certain functions, receiving badges or from signing in altogether.



### Resource Center

Quick access to iLobby announcements, useful resources and FAQs, technical support and product feedback.



#### Tooltip:

**Have a question? We're here to help!**

Reach out to [onboard@iLobby.com](mailto:onboard@iLobby.com) for any additional assistance.



# Thank you for choosing iLobby! We're here to help with any questions.



[help.ilobby.com](https://help.ilobby.com)

[onboard@iLobby.com](mailto:onboard@iLobby.com)