

Brivo Visitor Configuration Guide

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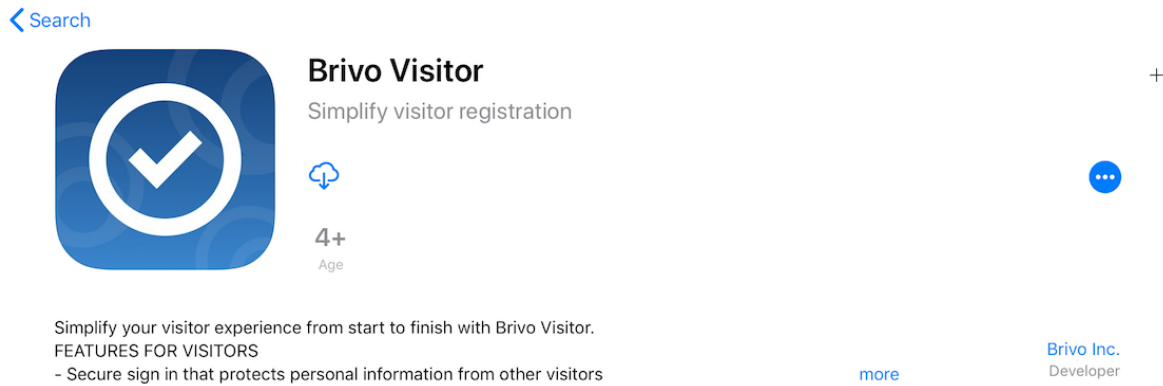
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Getting Started With Brivo Visitor

Brivo Visitor is a paid subscription add-on to Brivo Access, allowing customized branding and visitor experience for administrators, integrating seamlessly with your Brivo Access account with the capability for generating reports of visitor and delivery activity.

Installing Brivo Visitor

Brivo Visitor is a native iPad app installed directly from App Store.



Brivo Visitor supports all iPad and iPad Pro models running iOS 12 or higher.

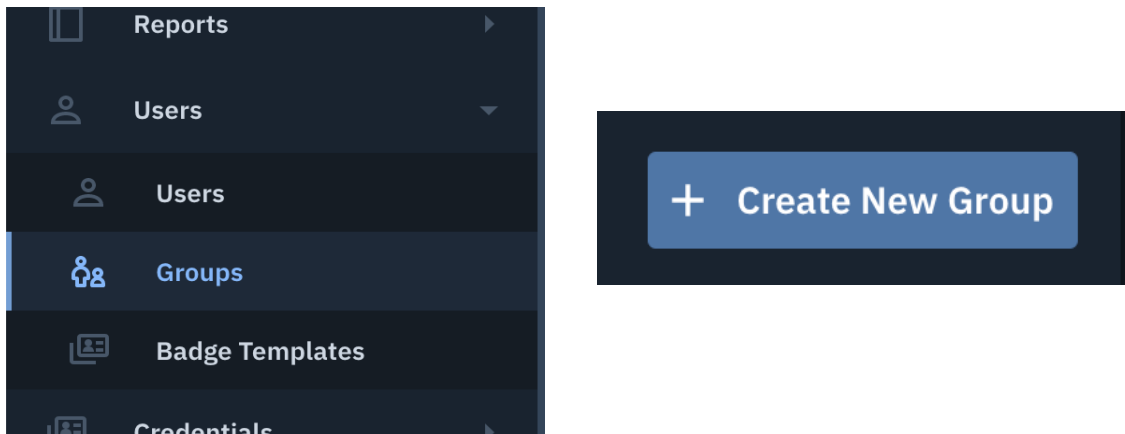
Brivo Visitor for Administrators

Configuring Brivo Access for use with Brivo Visitor

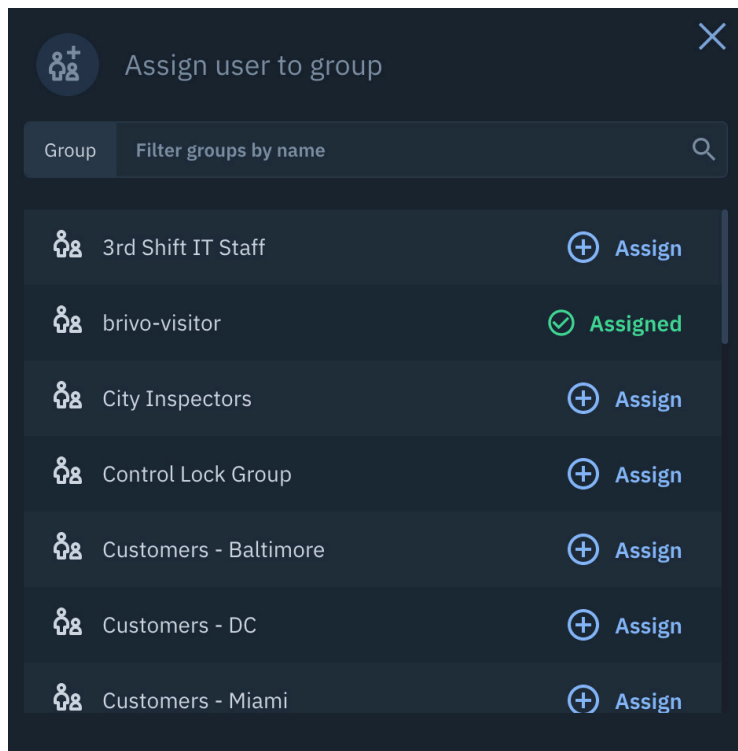
Brivo Visitor allows visitors and deliveries to be associated with a user from Brivo Access for both reporting and notification purposes. In order to link your Brivo Access account with Brivo Visitor, please complete the following steps within Brivo Access.

Retrieving Host List from Brivo Access

1. Create a new group in Brivo Access called brivo-visitor.



2. Assign the desired users to the brivo-visitor group.



3. To allow for automatic email notifications, ensure that each user has a valid email address associated with their user record.

The screenshot shows the user profile page for James Norton. The page is divided into a left sidebar and a main content area. The sidebar contains navigation options: Profile, Groups, Credentials, and Recent Activity, along with action buttons: Print Badge For User, Suspend User, and Delete User. The main content area is titled 'Profile' and contains the following fields:

- First Name:** James
- Last Name:** Norton
- Phone Number(s):** Mobile, 301-555-1234. Includes an 'Add Another Phone Number' button.
- Email Address(es):** Work, james.norton@brivoestorage.com. This field is highlighted with a red box. Includes an 'Add Another Email Address' button.
- Photo:** Includes 'Upload Photo' and 'Take Photo' buttons. A note below states: 'Image should be GIF, PNG or JPEG with maximum size of 2MB'.

Logging into Brivo Visitor

Brivo Visitor requires a valid Brivo Access login. Once an account has activated their Brivo Visitor subscription, any of the account's active Brivo Access administrator credentials can be used to log into Brivo Visitor.

11:10 AM Mon Sep 16

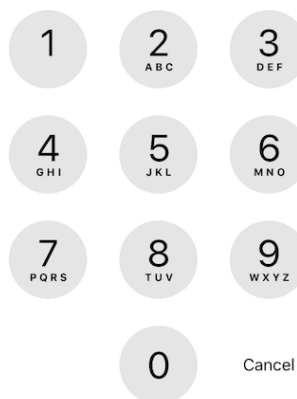
100%

Please Login



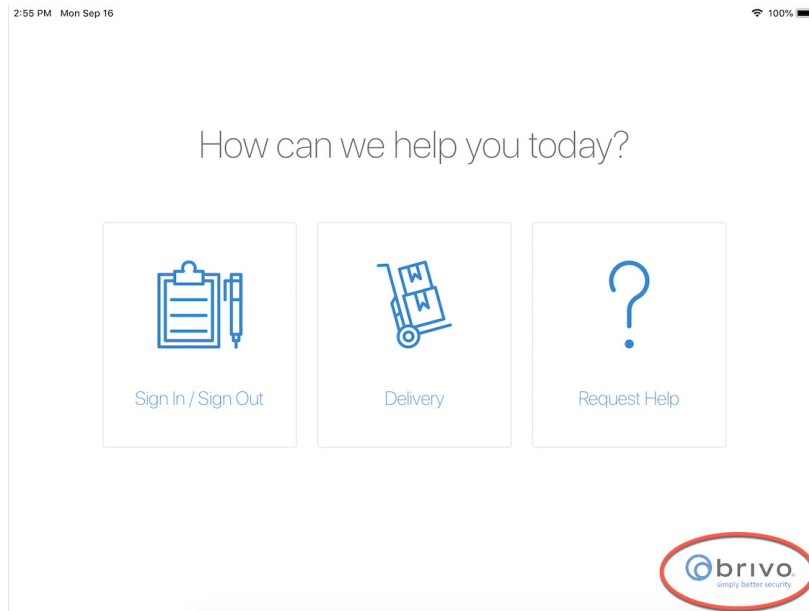
Access to the Configuration Menu requires successful authentication using the iPad's Touch ID, Face ID, or Passcode verification. If these options are not enabled, the Configuration Menu is available to all users without any authentication. Brivo strongly recommends utilizing at least one of these security measures at all times to prevent unauthorized users from accessing the Configuration Menu.

Enter iPad passcode for "Brivo Visitor"
To access Configuration Menu

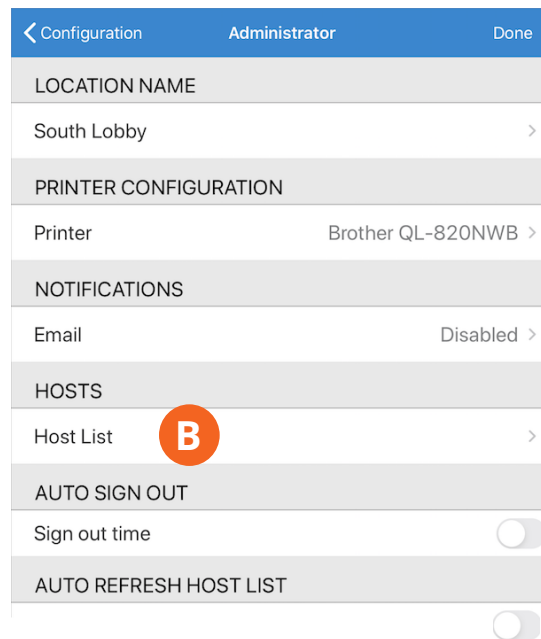
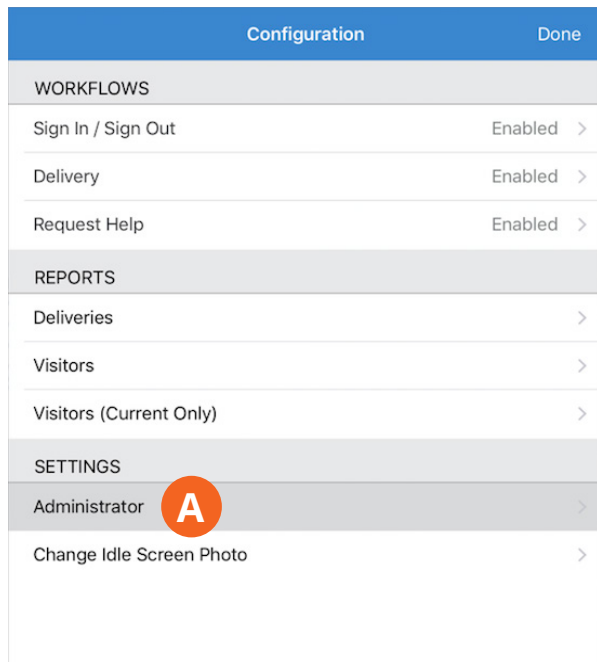


Accessing the Configuration Menu

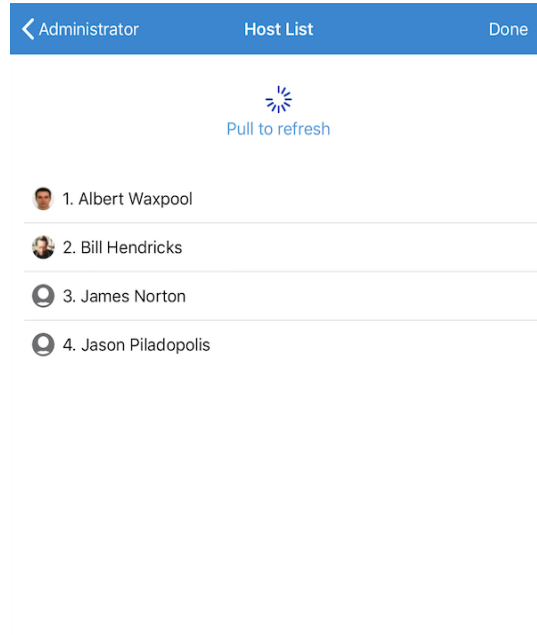
Brivo Visitor is configured using an in-app Configuration Menu. The Configuration Menu is accessed by tapping on the Brivo logo in the bottom right corner.



The first step you should take is to verify that the host list has been successfully imported from Brivo Access into Brivo Visitor. To access the host list within Brivo Visitor, open the Configuration Menu and select Administrator (A). When the Administrator screen displays, select Host List (B).



Update the Host List by swiping down anywhere within the Configuration Menu until the animated Pull to refresh icon appears. The Host List will now display all active Brivo Access users assigned to the brivo-visitor group created earlier.



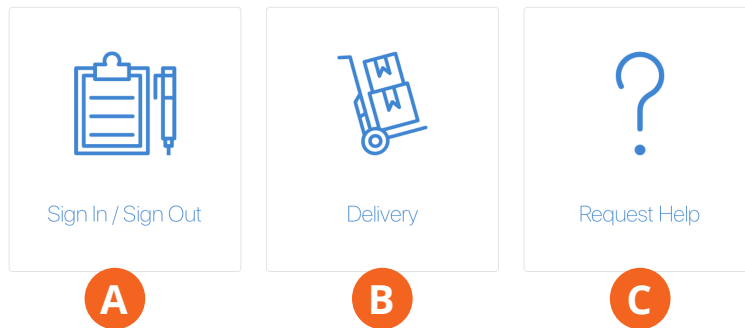
Workflows

There are three Workflows designed for Visitors established in the Configuration Menu for Brivo Visitor: Sign In/ Sign Out (A), Delivery (B), and Request Help (C).

3:15 PM Tue Sep 17

95%

How can we help you today?



In the Configuration Menu, you may configure and/or disable one or all of these options by selecting the option and making the necessary changes. Click Done when finished.


Configuration	Sign In / Sign Out	Done	Configuration	Delivery Type	Done	Configuration	Request Help	Done
Enable Sign In / Sign Out Flow <input checked="" type="checkbox"/>			Enable Delivery Flow <input checked="" type="checkbox"/>			Enable Request Help Flow <input checked="" type="checkbox"/>		
NOTIFICATIONS			DELIVERY TYPES			NOTIFICATIONS		
Email Disabled >			Mail Enabled >			Email Enabled >		
Package Enabled >			Food Enabled >					
Other Enabled >								
DISPLAYED PAGES								
Visitor Info <input checked="" type="checkbox"/>								
Host <input checked="" type="checkbox"/>								
Appointment Time <input checked="" type="checkbox"/>								
Take Photo <input checked="" type="checkbox"/>								
Custom Questions >								

Reporting

Brivo Visitor provides access to standard reports for deliveries and visitors accessible through the Configuration Menu.

Configuration	Done
WORKFLOWS	
Sign In / Sign Out	Enabled >
Delivery	Enabled >
Request Help	Enabled >
REPORTS	
Deliveries	>
Visitors	>
Visitors (Current Only)	>
SETTINGS	
Administrator	>
Change Idle Screen Photo	>

Filtering Reports

Each report can be further refined by applying filters to the report data. To enable report filters, tap the  icon in the upper right hand corner and making any necessary changes. Click Apply to apply the selected filters.

Reset Filters	Deliveries Filter	Apply
	Recipient	>
	Date Start Date End Date	▼
	Type Mail, Package, Food, Other	>
	Signature Required	<input type="checkbox"/>

Reset Filters	Visitor Filter	Apply
	First Name	▼
	Last Name	▼
	Phone Number	▼
	Email	▼
	Sign In Start Date End Date	▼
	Sign Out Start Date End Date	▼
	Host	>

Exporting Reports

After viewing a report, tap the Export to PDF button to generate a version of the report that can be saved.

Deliveries

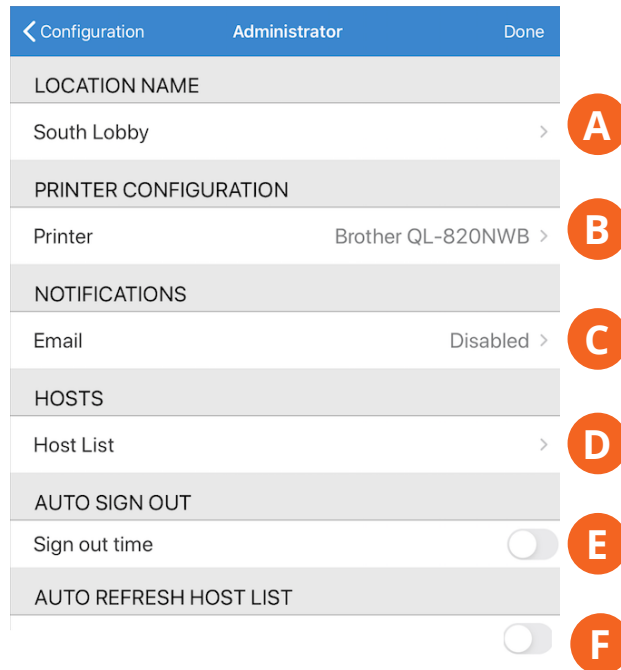
Recipient	Date	Type	Signature Required
James Norton	09/17/19, 3:13 PM	Mail	Yes
James Norton	09/16/19, 12:06 PM	Food	No
Sophia Rockwell	09/15/19, 11:57 AM	Food	No

Visitors

Name	Email	Phone	Host	Appointment	Photo Y/N	Sign In/Out
James Norton	james.norton@brivo.com	301-555-1212	Sophia Rockwell	2:30 PM	Y	05/01/2020, 2:26 PM
Albert Waxpool	albert.waxpool@qrs.com	301-888-9999	Sophia Rockwell	4:00 PM	Y	05/01/2020, 3:49 PM

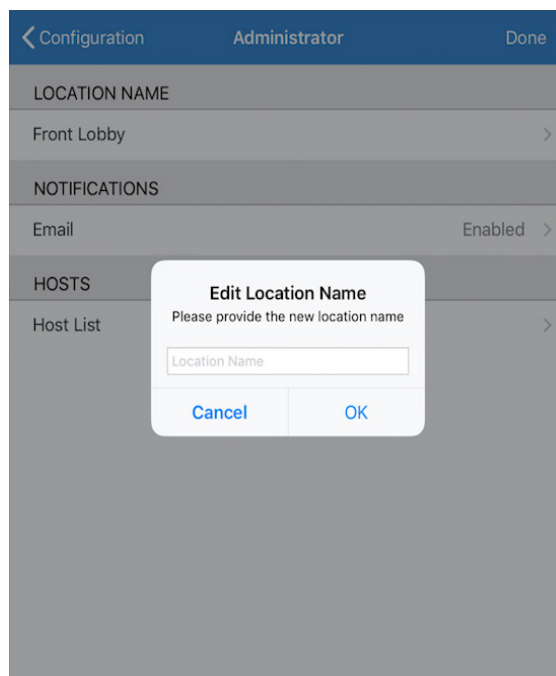
Administrator Functions

The Administrator screen under the Configuration Menu allows you to configure the Location Name (A), configure a badge printer (B), enable and configure Email Notifications (C), view and refresh the Host List (D), enable Auto Sign Out (E), and enable Auto Refresh for the Host List (F).



Location Name

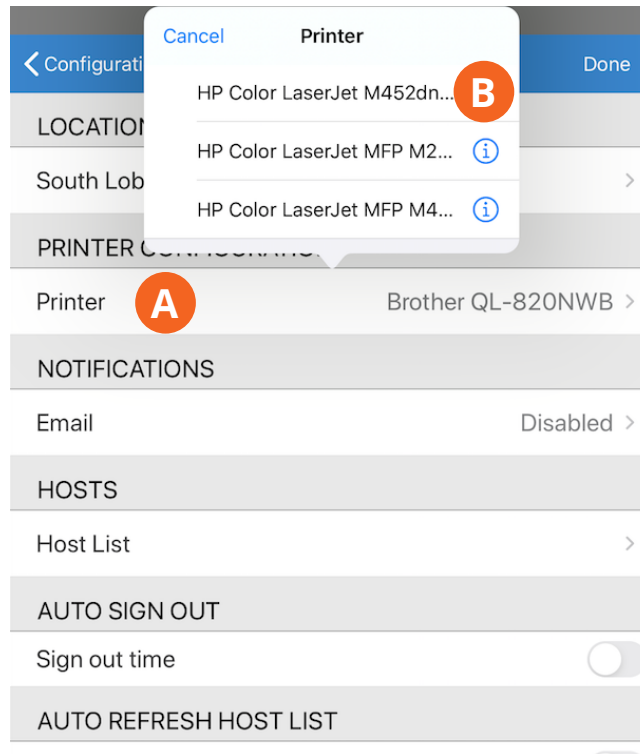
If Brivo Visitor is being placed in multiple locations, an administrator should provide an accurate descriptor for each kiosk. The Location Name is accessible from the Configuration Menu under Administrator > Location Name. Enter the new Location Name and click OK.



Printer Configuration

NOTE: Badge printing functionality is available ONLY to printers capable of supporting Apple AirPrint.

If Brivo Visitor is being used to print visitor badges, an administrator configures the badge printer by tapping on Printer (A). The list of available AirPrint printer appears. The administrator simply chooses the correct printer (B) and then the printer is available to print visitor badges. The Printer Configuration is accessible from the Configuration Menu under Administrator > Printer. Select the Printer and it is automatically added.



Email Notifications

Sign In / Sign Out

Administrators have the option to enable email notifications when a new visitor signs in using Brivo Visitor. Email notifications can be sent to the visitor's selected host or to a standard list of recipients.

To enable email notifications to the selected recipient:

1. Tap Sign In / Sign Out to open the workflow settings
2. Tap the row for Email Notifications
3. Turn on Enable Email Notifications
4. Tap the Host row under Displayed Pages

NOTE: See Retrieving Host List from Brivo Access for information on downloading hosts and their email addresses.

To enable email notifications to a standard list of recipients:

1. Tap Sign In / Sign Out to open the workflow settings
2. Tap the row for Email Notifications
3. Turn on Enable Email Notifications
4. Tap the Add recipient button and add the email addresses

Delivery

For each delivery type, administrators have the option to enable email notifications when a new delivery is received. Email notifications can be sent to the delivery's recipient or to a standard list of recipients.

To enable email notifications to the selected recipient:

1. Tap Delivery to open the workflow settings
2. Select the desired Delivery Type
3. Tap the row for Email Notifications
4. Turn on Enable Email Notifications
5. Turn on Notify Recipients

To enable email notifications to a standard list of recipients:

1. Tap Delivery to open the workflow settings
2. Select the desired Delivery Type
3. Tap the row for Email Notifications
4. Turn on Enable Email Notifications
5. Tap the Add recipient button and add the email addresses

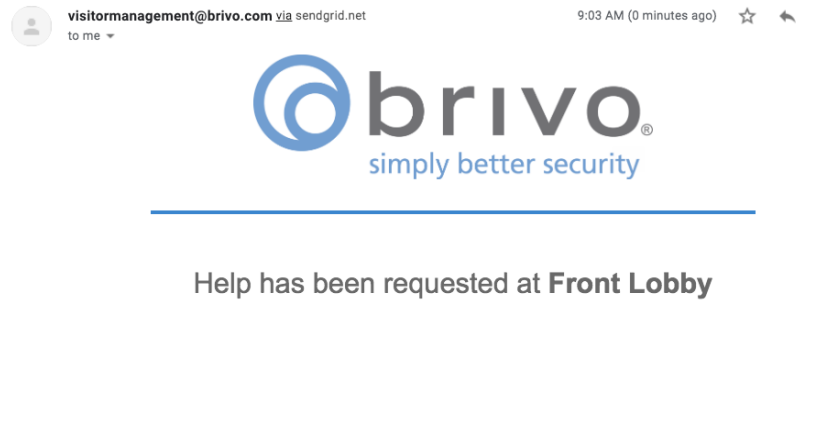
Request Help

Request Help email notifications can be sent to a standard list of recipients.

To enable email notifications to a standard list of recipients:

1. Tap Help Request to open the workflow settings
2. Tap the row for Email Notifications
3. Turn on Enable Email Notifications
4. Tap the Add recipient button and add the email addresses

When an email notification is sent, an automatic email response (as in the Request Help example below) will be sent to the appropriate recipient(s).

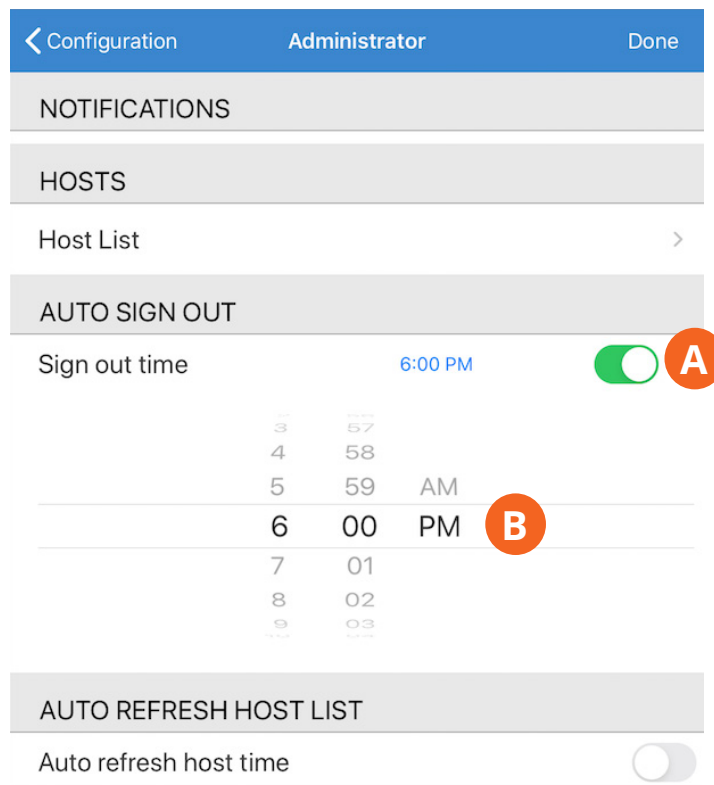


Host List

Please refer to Page 7 for instructions on accessing and refreshing the Host List.

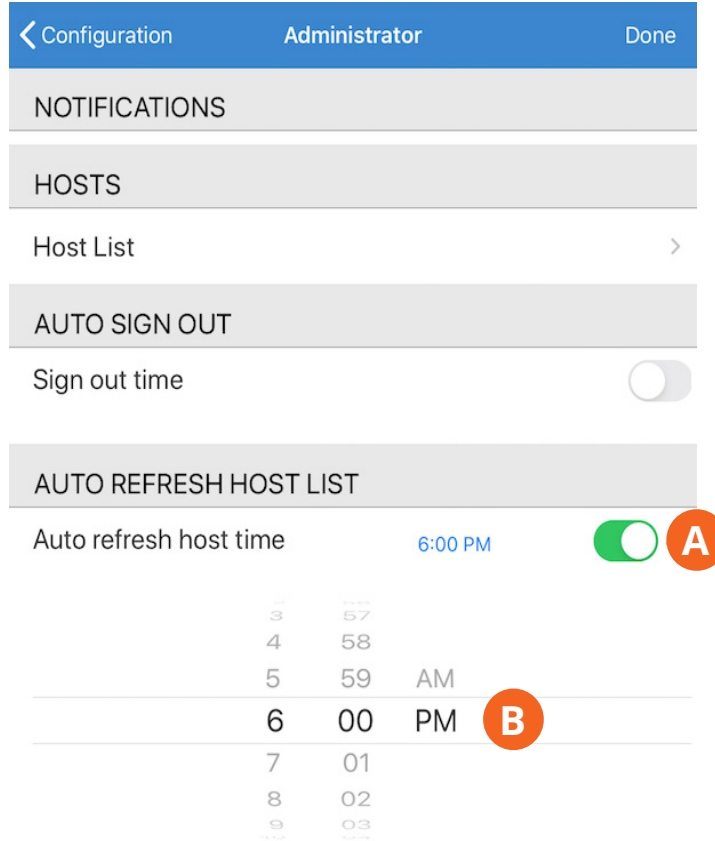
Auto Sign Out

Brivo Visitor allows administrators to automatically sign out all visitors at a selected time each day. This allows for daily reports to exclude visitors from previous days, making, for example, mustering options more accurate. Auto Sign Out is accessible from the Configuration Menu under Administrator > Auto Sign Out. Flip the switch on (A) and then select the time to automatically sign out all visitors currently in the system (B).



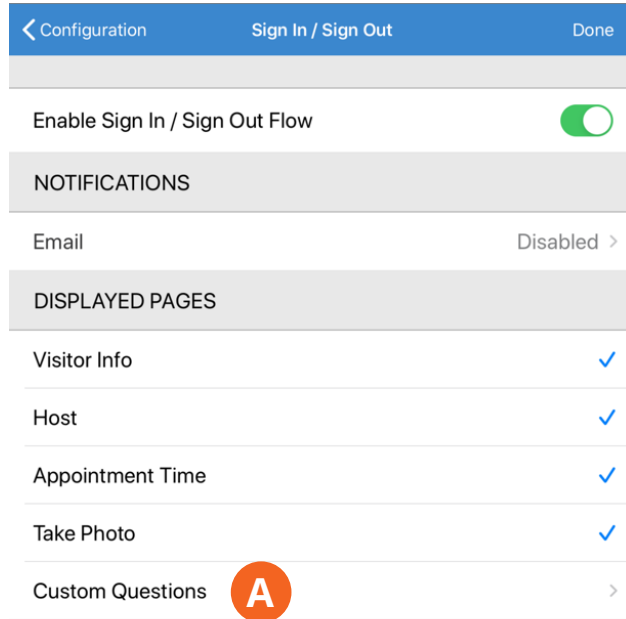
Auto Refresh Host List

Brivo Visitor allows administrators to automatically refresh the Host List at a selected time each day. Auto Refresh Host List is accessible from the Configuration Menu under Administrator > Auto Refresh Host List. Flip the switch on (A) and then select the time to automatically refresh the Host List (B).

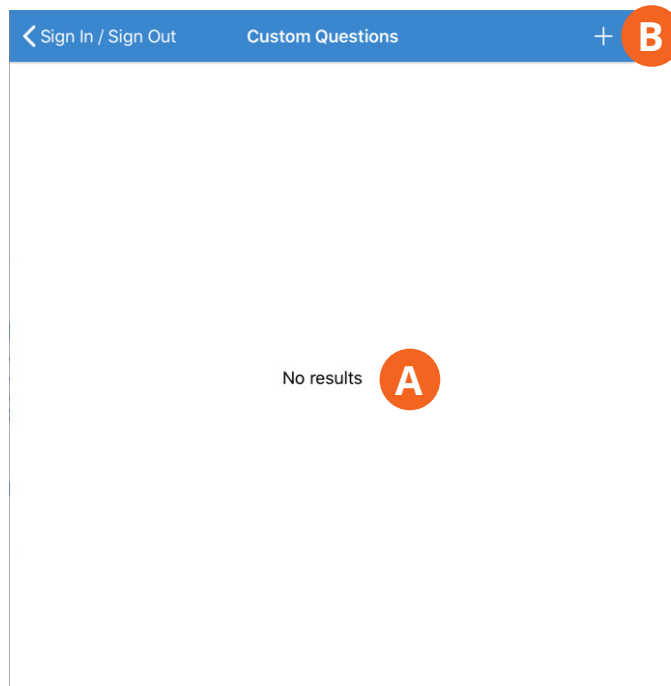


Custom Questions

Administrators have the option to enable the system to ask custom questions when a new visitor signs in using Brivo Visitor. To enable custom questions, tap Sign In / Sign Out to open the workflow settings and then click on the row for Custom Questions (A).



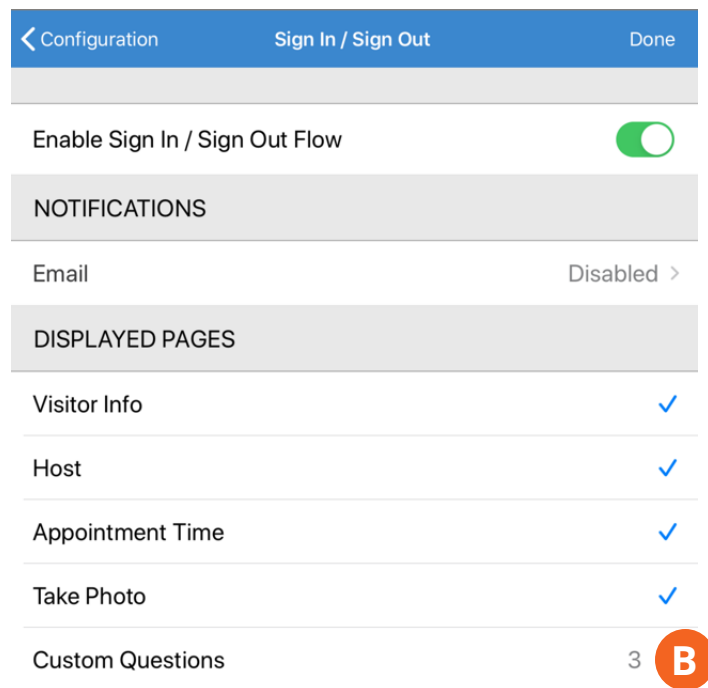
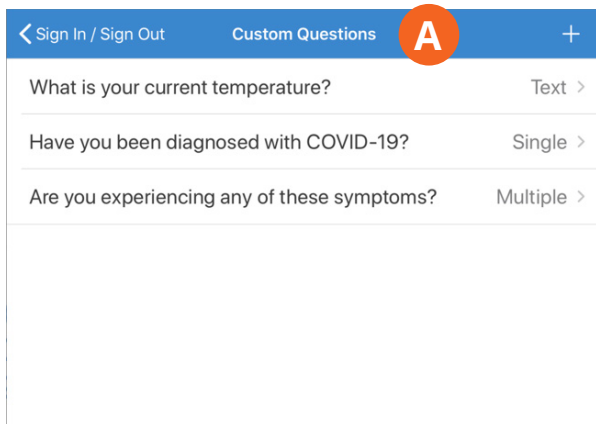
The first time the Custom Question screen is accessed, you will see a display of No Results (A) due to no questions having been entered in the system. To add a question, click on the + symbol (B) in the upper right-hand corner.



The Add New Question screen is displayed. You will enter your question in the Question field (A) and then select the Response Type (B). There are three response types (Textbox, Single Selection, Multiple Selection) which are shown as examples below.

Enter your question into the Enter Question field (A) and then select Textbox (B), Single Selection (C) with available responses listed (D), or Multiple Selection (E) with available responses listed. If you need to add any new responses, simply click on the Add New Response (F) button and enter them.

Once the questions have been entered, when you return to the main Custom Questions screen, you will see your questions present (A) and on the Sign In / Sign Out workflow page, you will see the number of custom questions currently listed (B).



The results of these custom questions are available in a number of ways. An administrator may see the results through the Visitor Reporting option (A), the answers are emailed to the person the visitor is here to see (B), and the results are also available by going into the Visitor List and clicking on one of the visitors (C).

A

Visitor

Name	Email	Phone	Host	Appointment	Photo Y/N	Sign in/out
Dorel Macra	dorel.macra@gmail.com	0755901333	Ciprian Zapuc	11:58 AM	Y	05/12/20, 11:59 AM

Questions

Have you been diagnosed with COVID-19 with the last 14 days?
 Yes ✓
 No

Have you experienced any cold or flu-like symptoms in the last 14 days (to include fever, cough, sore throat, respiratory illness, difficulty breathing)?
 Yes
 No ✓

Have you had close contact with or cared for someone diagnosed with COVID-19 within the last 14 days?
 Yes
 No ✓

B

Name: James Norton
Email: james.norton@brivo.com
Phone: 0744901321
Host: James Norton
Appointment: 1:12 PM
Sign In Date: 05/12/20, 1:12 PM

Questions

Have you been diagnosed with COVID-19 with the last 14 days?	Yes	No ✓
Have you experienced any cold or flu-like symptoms in the last 14 days (to include fever, cough, sore throat, respiratory illness, difficulty breathing)?	Yes	No ✓
Have you had close contact with or cared for someone diagnosed with COVID-19 within the last 14 days?	Yes ✓	No
Brivo Privacy Policy	https://www.brivo.com/privacy/	Agreed

C

Document Agreement

The Document Agreement feature allows companies to present documents requiring acceptance (such as Non-Disclosure Agreements or Privacy Policies) to visitors. A document is easily configured with a URL link. A visitor can accept or deny the agreement. If a visitor denies the agreement, they will not be allowed to proceed with the Sign-In process. A copy of the acknowledgment with the visitor's name, date and URL can be shared to both Host/Admin and Visitor via email. To enable the Document Acceptance feature, an administrator needs to enable **Document Agreements** in the configuration menu.

Access the Configuration menu and Select Sign In/Sign Out and then click on Document Agreements (A). The Add New Document Agreement page displays.

< Configuration
Sign In / Sign Out
Edit

Enable Sign In / Sign Out Flow

NOTIFICATIONS

Email Enabled >

DISPLAYED PAGES

Custom Questions 1 >

Visitor Info ✓

Host ✓

Appointment Time ✓

Document Agreements A >

Take Photo ✓

< Back
Add New Document Agreement

DOCUMENT TITLE

Enter Document Title

URL LINK

Enter the URL link of the document

Enter the Document Title (B) and then the URL Link (C) to the document. Once complete, the new Document (D) will be displayed on the Document Agreements page.

< Back
Add New Document Agreement

DOCUMENT TITLE

Visitor policy B

URL LINK

https://www.brivo.com/terms-of-use-brivo-onair/ C

< Sign In / Sign Out
Document Agreements
+

Visitors Policy D Document >

Idle Screen Image

The Idle Screen is displayed when the kiosk has been inactive for a period of time.



Brivo Visitor displays a default Idle Screen image, but administrators can change this image to any photo or image on the device by selecting Change Idle Screen Photo on the Configuration Menu.

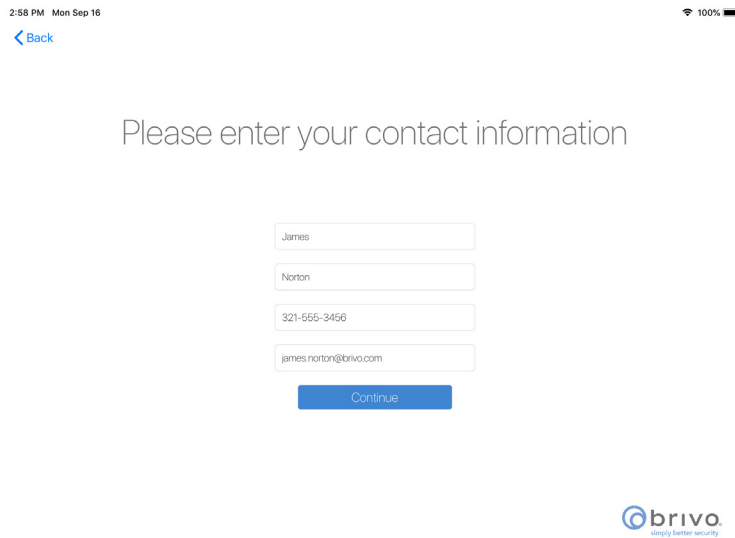
Configuration	Done
WORKFLOWS	
Sign In / Sign Out	Enabled >
Delivery	Enabled >
Request Help	Enabled >
REPORTS	
Deliveries	>
Visitors	>
Visitors (Current Only)	>
SETTINGS	
Administrator	>
Change Idle Screen Photo	>

Brivo Visitor for Visitors

Brivo Visitor is preconfigured with a standard set of workflows. However, administrators can control which workflows are displayed, as well as the individual settings for each workflow. In the following sections, we will outline the different workflows available and the options that can be changed within each workflow.

Sign In / Sign Out

The Sign In / Sign Out workflow allows visitors to enter their contact information, notify their host that they have arrived, and optionally print a badge for the visitor. By default, all pages are displayed and no email notifications are sent for new visitors.



2:58 PM Mon Sep 16 100%

[Back](#)

Please enter your contact information


James

Norton

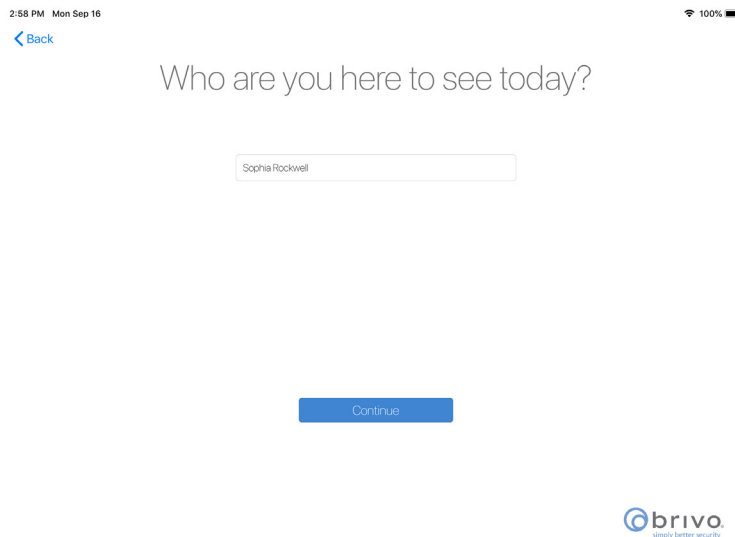
321-555-3456

james.norton@brivo.com

Continue



NOTE: Visitor Info is required for all new visitors. Do not disable this page.




2:58 PM Mon Sep 16 100%

[Back](#)

Who are you here to see today?

Sophia Rockwell

Continue



2:58 PM Mon Sep 16 100%

[Back](#)

What time is your appointment?

1	57	
2	58	
3	59	AM
4	00	PM
5	01	
6	02	

[I do not have an appointment](#)

[Continue](#)

NOTE: If the Custom Questions option is enabled, a screen will automatically appear and the visitor will be asked to complete the questions listed.

3:02 PM Tue Apr 14 11%

[Back](#)

Please answer the following questions

What is your current temperature?

Have you been diagnosed with COVID-19?
Yes
No

Are you experiencing any of these symptoms?
Fever
Cough
Shortness of Breath

[Continue](#)

Once the questions are successfully answered, the visitor should click on the Continue (A) button.

3:03 PM Tue Apr 14 11%

[Back](#)

Please answer the following questions

What is your current temperature?

Have you been diagnosed with COVID-19?
Yes
No

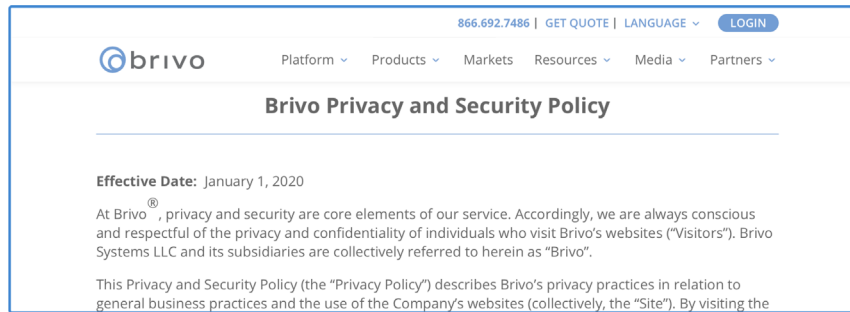
Are you experiencing any of these symptoms?
Fever
Cough
Shortness of Breath

[Continue](#) **A**

NOTE: If the Document Agreement option is enabled, a screen will automatically appear and the visitor will be asked to read and agree with the document shown.

[← Back](#)

Visitors Policy



Please read through the document first

I Don't Agree

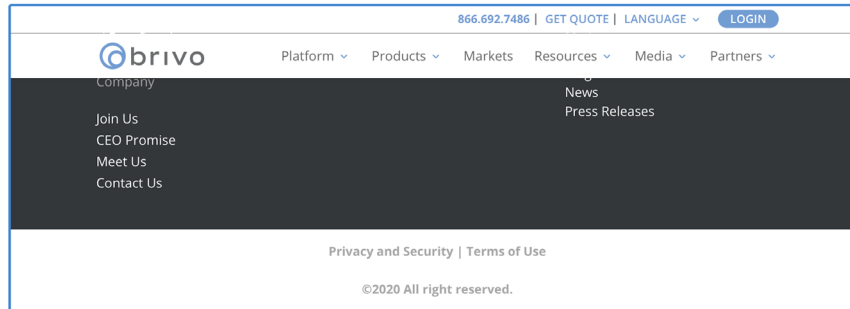
I Agree



Once the visitor has read the document, they may press the **I Don't Agree** button (A) to halt the Sign In process or the **I Agree** button (B) to continue.

[← Back](#)

Visitor policy



A I Don't Agree

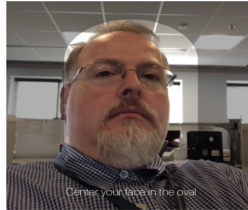
I Agree **B**



NOTE: If the Visitor Photo page is enabled, the photo will be included in email notifications.



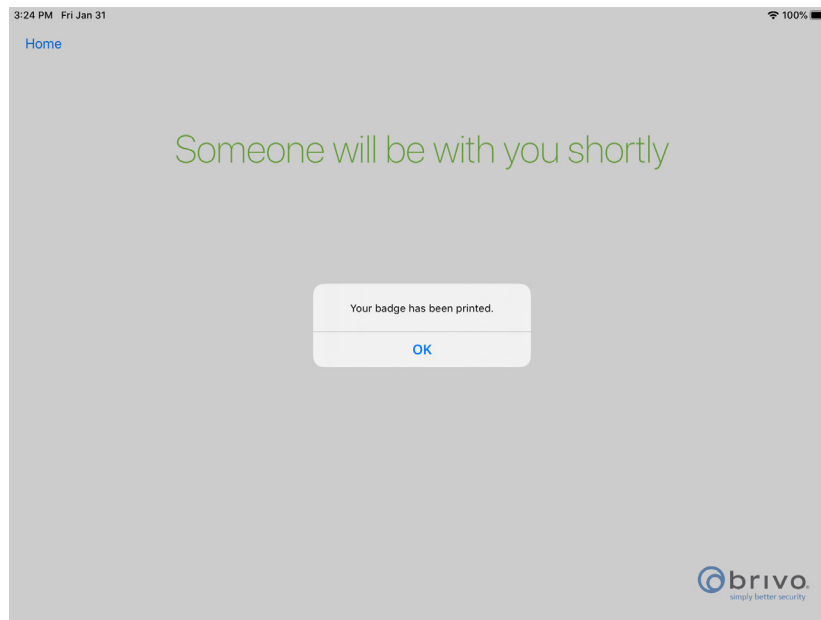
We need a photo for your visitor badge



Take Photo



NOTE: If the Printer Configuration option is enabled, a badge will automatically print directly after the photo being taken. A confirmation message will appear. Tap OK and the Sign-In process is complete.



Delivery

Brivo Visitor supports up to four delivery types: mail, package, food, and other. Although all delivery types are enabled by default, administrators can disable individual delivery types or the entire delivery workflow. In addition, each delivery type can be configured with its own screens and notification settings.

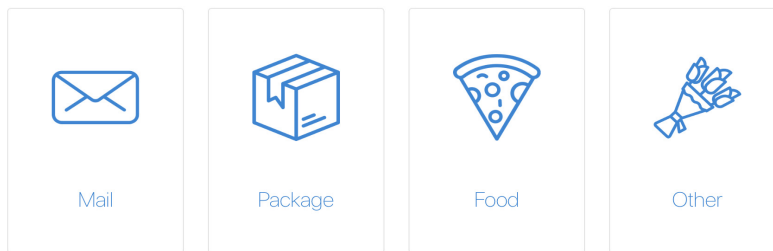
Available Screens

2:56 PM Mon Sep 16

100%

[Back](#)

What are you delivering?



9:08 AM Wed Sep 18

82%

[Back](#)

Who is the recipient?

[Continue](#)

9:09 AM Wed Sep 18

81%

[Back](#)

Is a signature required?



No



Yes



NOTE: Signature is only available for Mail and Package delivery types.

Request Help

The Request Help workflow provides an easy way for visitors to send a notification that they need help and, in locations with multiple kiosks, where they are located.

2:56 PM Mon Sep 16

100%

[Home](#)

Someone will be with you shortly



Revision Table

Date	Version	Content
September 18, 2019	1.0	Original document
February 3, 2020	1.1	Added updated Administrator functions
May 11, 2020	1.2	Added Custom Question functionality
June 5, 2020	1.3	Added Document Agreement and Visitor Pre-Registration
July 29, 2020	1.3.1	Temporarily removed Visitor Pre-Registration section
March 22, 2021	1.3.2	Corrected a screenshot on Page 8
May 19, 2021	1.3.3	Corrected a typo on Page 20
August 9, 2022	1.4	Removed Onair references and updated screenshots