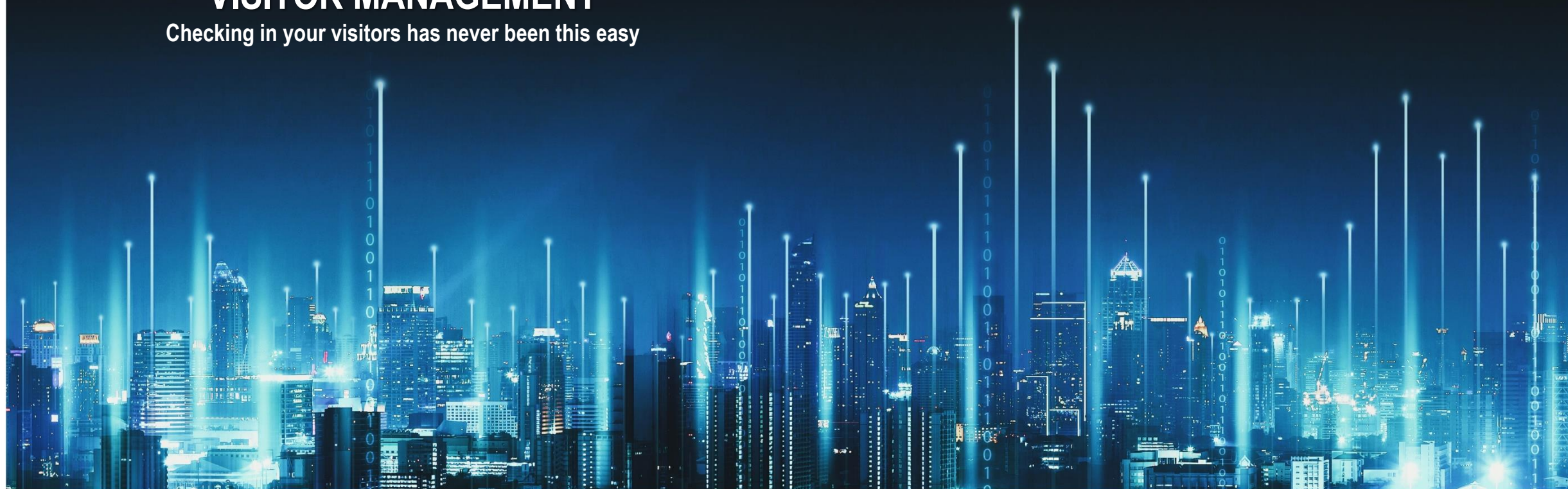


BLENDED.

VISITOR MANAGEMENT

Checking in your visitors has never been this easy



BLENDED.

1. Overview
2. Booking process
3. Booking using Outlook
4. Booking using the employee dashboard
5. Visitor pre-registration

1. Overview

FirstRand has many of visitors come through its buildings daily. The process of accepting visitors is very manual.

With the new visitors management system visitors will have access to all the information needed before they make their way to one of the FirstRand buildings. They will complete all their information beforehand, making the process seamless and quick.

Each employee can manage all aspects related to their visitors. With each formal invite the visitor will have access to:

- Completing their personal information before arriving
- Directions
- Booking
- Informing organiser of additional visitors

2. Booking process

There are two main ways in which one can invite their visitor:

Option 1:



Using Outlook

Visitor receives email with instructions to pre-register

Visitor completes pre-registration via RMB site

Arrive at FirstRand



Temperature checks and capturing are still mandatory at reception.



Option 2:

Using employee dashboard

Visitor receives email with instructions to pre-register

Visitor completes pre-registration via RMB site

Arrive at FirstRand

3. Booking using Outlook

Inviting a visitor using Outlook, you will invite a visitor to your meeting as per normal. To activate the visitor management system, you will need to add the email address linked to your building. This will initiate an email to your visitor to notify them of the pre-registration.

Each visitor attending your meeting will need to be added onto your invite and will all need to complete the pre-registration even if they travel together.

Buildings set-up with the visitor management system:

Building	Email address
1 First Place – BankCity	fnb.1fp@wizzpass.com
2 First Place – BankCity	fnb.2fp@wizzpass.com
5 First Place – BankCity	fnb.5fp@wizzpass.com
1 Merchant Place – RMB	rmb.1mp@wizzpass.com
4 Merchant Place – RMB	rmb.4mp@wizzpass.com
5 Merchant Place – RMB	rmb.5mp@wizzpass.com

Invite visitor using Outlook

Discuss Visitor Process - Meeting

File Meeting Scheduling Assistant Insert Format Text Review Help Tell me what you want to do

Delete Appointment Resource Scheduler Skype Meeting Teams Meeting Meeting Notes Cancel Invitation Address Book Check Names Response Options

Actions Show Skype Me... Teams Me... Meeting N... Attendees Options

Show As: Busy

Reminder: 15 minutes

You haven't sent this meeting invitation yet.

Send

Title Discuss Visitor Process

Required visitor@gmail.com fnb.1fp@wizzpass.com

Optional

Start time Wed 2020/10/14 13:00

End time Wed 2020/10/14 13:30

Location

All day Time zones

Make Recurring

Complete your Outlook invite as per normal

1. Title
2. Required attendees to your meeting
3. Location

For this scenario we selected 1 First Place as the building. We added fnb.1fp@wizzpass.com by adding this email address before we add our visitor to the visitors list.

Wizzpass will identify the visitor (non-FirstRand email address) and automatically send them the email with instructions to pre-register.


IMPORTANT: All visitors attending your meeting will need to be invited to enable them to complete a pre-registration even if they travel in one vehicle.

Firststrand Visitor Booking - [External Email]

FV Firststrand Visitor System <noreply@wizzpass.com>
To: Stewart, Tanja

Reply Reply All Forward ...

Fri 2020/10/16 09:23

 **FirstRand**

Hello Tanya Stewart

Please see details below about your visitor booking on **Friday 16 October 2020**,
made from a calendar meeting request.

Subject: Visitors System Discuss
Location: 2 First Place

Visitor booked:
tanjawentz@gmail.com

If you wish to edit your booking, please edit your calendar appointment and when prompted, please select **send updates to all attendees**.

When adding further invitees to your calendar invite, please also edit the meeting invite in any way (such as a simple edit to the subject line) in order for the additional invitees to also receive their pre-arrival booking confirmation.

Powered by WizzPass

As the organiser of the meeting, you will receive a confirmation email, confirming the visitors you invited.

You can edit this booking through your Outlook and can add and delete attendees to your meeting.



Firststrand <noreply@wizzpass.com>
To: Stewart, Tanja

Reply

Reply All

Forward



Tue 2020/10/13 13:36



FirstRand

Dear tstewart@fnb.co.za,

Welcome to the Firstrand visitor management service to help make your visitor experience quick and convenient.

Chris Ruscoe is looking forward to meeting you on **Wednesday 14 October 2020** from 1:30 PM to 2:00 PM at **1 First Place**.

Subject: Visitor meeting

Meeting venue: 1 First Place vlvkv

IMPORTANT - Please note all visitors that have not completed the online pre-registration will be required to complete their details at the reception area.

We hope you enjoy your visit to FirstRand.

Powered by WizzPass

Your guest/visitor will receive two emails.

1. Outlook invite
2. This email confirming they have been listed as a visitor.
3. Your booking reference: You will use that reference number when completing your pre-registration
4. This email outlines the process the visitor will need to follow.

To pre-register they will need to access the RMB website.
(Explained later in this guide)

4. Booking using employee dashboard

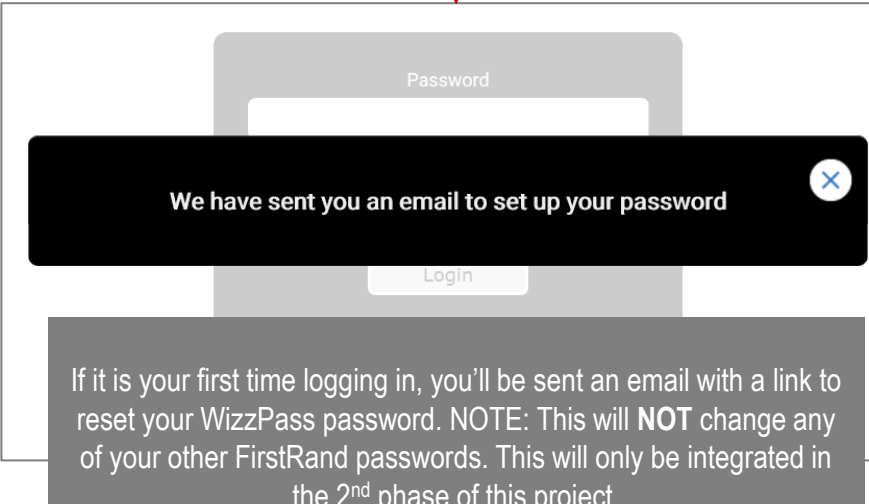
VIA EMPLOYEE DASHBOARD:

Go to <https://firstrand.wizzpass.com> (you won't need your VPN to access this site).

1. Login with your FirstRand email.
2. Under “**Visitor Bookings**”, add your visitor’s email address. You can add more guests by clicking “Add more visitors”. Include a date by making a selection in the **Visit Date** field and click Submit.
3. For large groups of visitors use the “**Book group visits**” (not covered in this manual) button to upload an excel file with a large number of guests (if required).



The image shows the FirstRand login interface. It consists of two side-by-side panels. The left panel has the FirstRand logo at the top, followed by a black box containing the text "Email *" above a white input field, and a "Login" button below it. The right panel also has the FirstRand logo at the top, followed by a black box containing the text "Password" above a white input field. Below the password field is a checkbox labeled "Keep me logged in for a week", a "Login" button, and a link that says "Send me a mail to reset my password".




The image shows the FirstRand login interface with a password reset notification. A red arrow points from the "Login" button in the previous image to this one. The interface is the same as the previous one, but with a black notification box overlaid on top of the login fields. The notification box contains the text "We have sent you an email to set up your password" and a close button (X). Below the notification box, there is a grey box with the following text: "If it is your first time logging in, you'll be sent an email with a link to reset your WizzPass password. NOTE: This will **NOT** change any of your other FirstRand passwords. This will only be integrated in the 2nd phase of this project."

Employee dashboard

After logging in you will be presented with a few options

All these options will be covered in this manual.

**FirstRand**

Home

Visitor Bookings

Visitor History

Powered by **WizzPass**

BOOK VISIT

Book group visits

Location

1 Merchant Place

1

Visitor Email(s)

2

Email

3

Name (optional)

4

Surname (optional)

5Add more visitors

6

Visit Date

7

Enter end date

Submit

A list of visitors that you have booked


BOOKED VISITS				Add/View all
Location	Visitor	Start	End	
2 First Place	tanjawentz@gmail.com	Oct 16	Oct 16	

Booking a visitor.

1. Location: Building where the meeting will take place.
2. Visitor email: Email address of the visitor, this is not optional as the visitor needs to receive an email to pre-register
3. Name and surname: Visitor name and surname is optional
4. Visit date: the date they will be coming to FirstRand.
5. Add more visitors: Should you want to add additional visitors to this invite.
6. Visit date: Select the date that the visitor will be coming to the building.
7. Submit: Selecting submit you will be booking the visitor as a visitor. This will prompt an email to them to pre-register (as per page 8).

Important: All visitors that will be attending your meeting

10

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Booking a group visit

BOOK GROUP VISITS

Important: Please take note of the following instructions when booking group visits:

THE EXCEL FILE

The invitation list must be in Excel 2007 or newer, with an .xlsx extension.

The first tab must be named "sheet1".

The sheet must contain the exact headings in the first row, in the following sequence:

- Email
- Name
- Surname
- Visitor Type

DATA POPULATION REQUIREMENTS

- Email: **required** (no blank cells)
- Name & Surname: **optional** (can be left blank)
- Visitor Type: **optional** (if the location requires it, please see below)


When choosing the location below:

1 Merchant Place the visitor column content is optional and can be empty
1 First Place the visitor column content is optional and can be empty
2 First Place the visitor column content is optional and can be empty
5 First Place the visitor column content is optional and can be empty
4 Merchant Place the visitor column content is optional and can be empty
5 Merchant Place the visitor column content is optional and can be empty

THE PROCESS

- Select visit date first.
- Select the Location. Every Location could have different Visitor Type requirements (the last column).
- Then click the "Select File" button below which will allow you to select the Excel booking list to upload.
- The file will then be inspected and feedback will be provided if there are any conditions that are prohibiting the import.
- The file will first be uploaded to a **temporary space** and you will be shown the consequences if you were to proceed with the import.
- Once the file is uploaded in the temporary space, you will be get further instructions on how to proceed.

Visit Date



Enter end date

Location

1 Merchant Place

+ Select file...

Booking a group visit

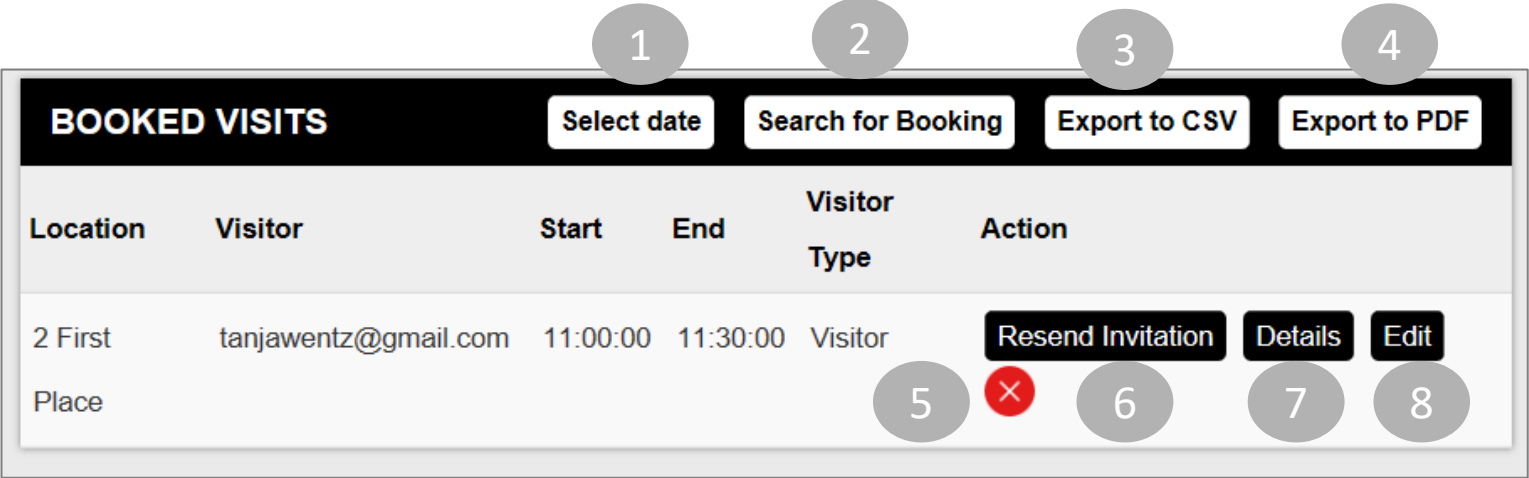
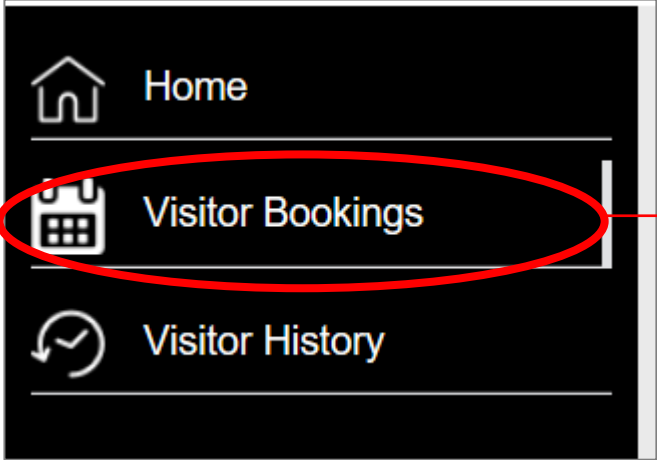
In the event of booking a big group of visitors, you can do this as one invite and the system will generate their invites. You will not need to invite each person individually.

Create an excel spreadsheet with the following fields/ details of the visitors:

- Email address
- Name
- Surname
- Visitor type – linked to the location

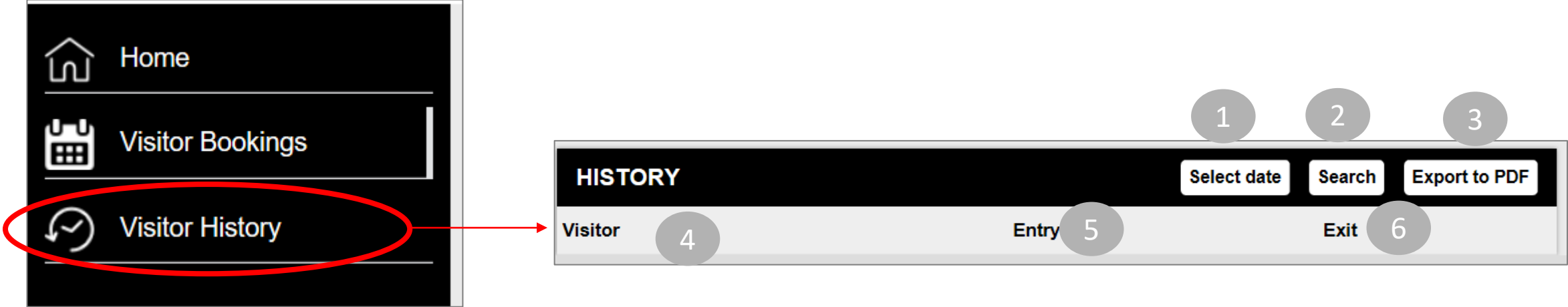
Once you have the spreadsheet ready, you will complete the upload process stipulated.

Visitors bookings



Booked visit options	
1. Select date	Gives you the option to filter your bookings by day, month or a specific date range
2. Search for booking	You will be able to search your booking by name, surname, email, cell number or ID number
3. Export to CSV	You can export your list of bookings in a CSV format
4. Export to PDF	You can export your list of bookings in a PDF format
5. Delete	Allows you to delete the visitor
6. Resend invitation	You can resend the invitation to your visitor
7. Details	You can see the full details of the booking
8. Edit	You can edit the original date of the invitation

Visitors history



Booked visit options	
1. Select date	Date your visitor will be coming to FirstRand
2. Search	You will be able to search your booking by name, email
3. Export to PDF	You can export your list of bookings in a CSV format
4. Visitor	Name of the visitor
5. Entry	Time visitor entered the building
6. Exit	Time visitor left the building

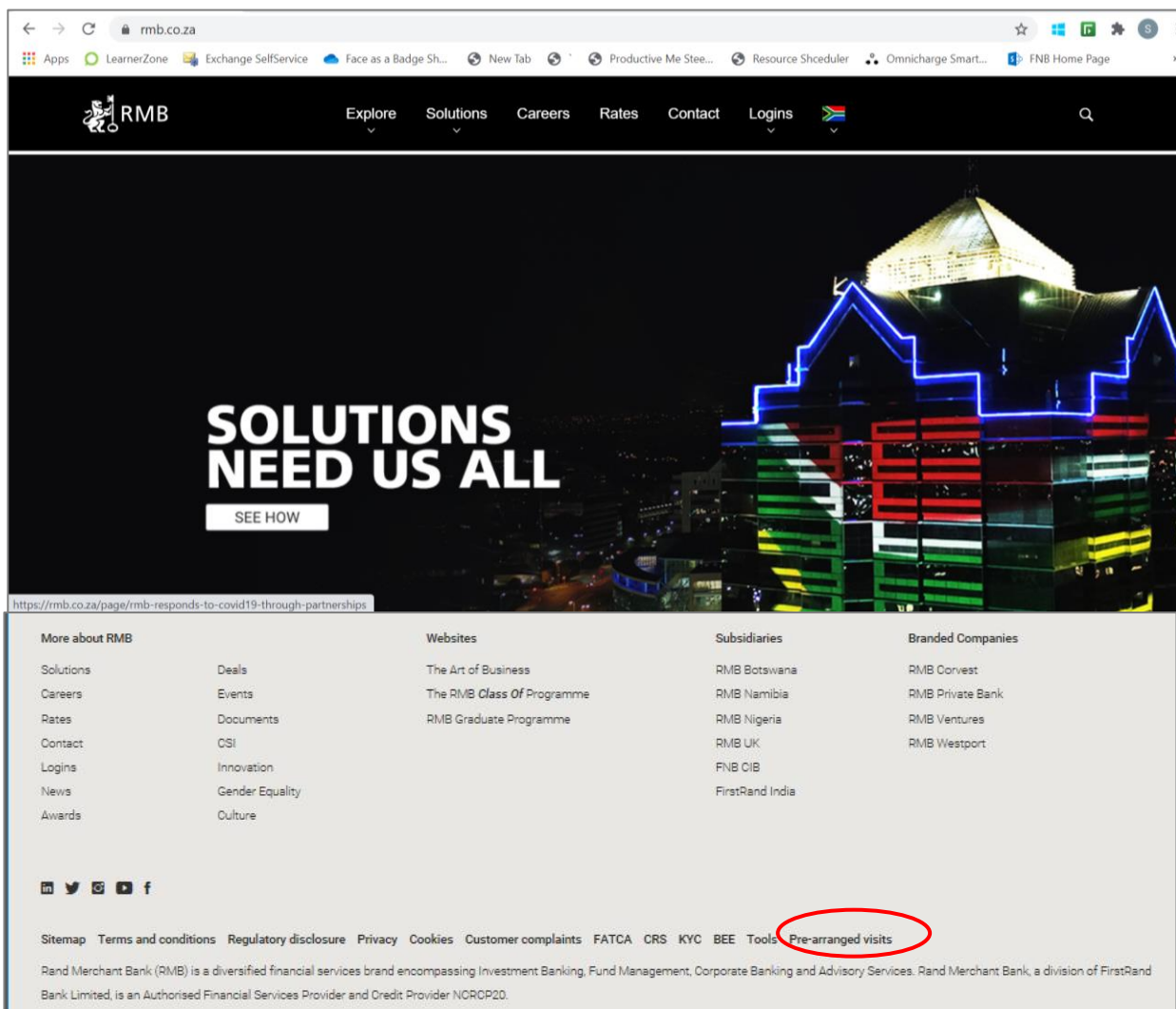


BLENDED.

**VISITOR
PRE-REGISTRATION**

Visitor pre-registration

As the organiser of the meeting, you will not be required to complete the pre-registration process. But you may need to support your visitor with this process.



Visitor pre-registration

All visitors invited will need to complete a pre-registration process. They can go to www.rmb.co.za

Scroll to the bottom of the webpage and select “Pre-arranged Visits”

They will direct to pre-registration page.

A similar link will be available on the FNB site in time.



Visitor pre-registration

Please enter your email and the booking reference received in your invitation email to continue with pre-registration.

1

Email Address

Please enter your email address

2

Booking reference

Enter a booking reference

3

Submit



Capturing their pre-registration

As stipulated in the email sent to the visitor, they will need to complete the pre-registration prior to going to one of the FirstRand buildings.

1. **Email address:** Visitor will use the email address the invitation was sent to.
2. **Booking reference number:** Reference number that was in the email sent to the visitor informing them of the pre-registration.
3. **Submit:** To continue with the pre-registration process.

Important: All visitors attending your meeting will need to complete a pre-registration even if they all travel in one vehicle.



Visitor pre-registration

1

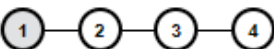
2 First Place

You are pre-registering with the following email:

2

visitor@gmail.com

3



If you are a South African citizen, please enter your ID number

ID Number

4

OR

If you are not a South African citizen, please enter your passport number

Passport Number

5

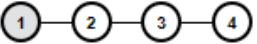
6

Next



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Visitor pre-registration step 1

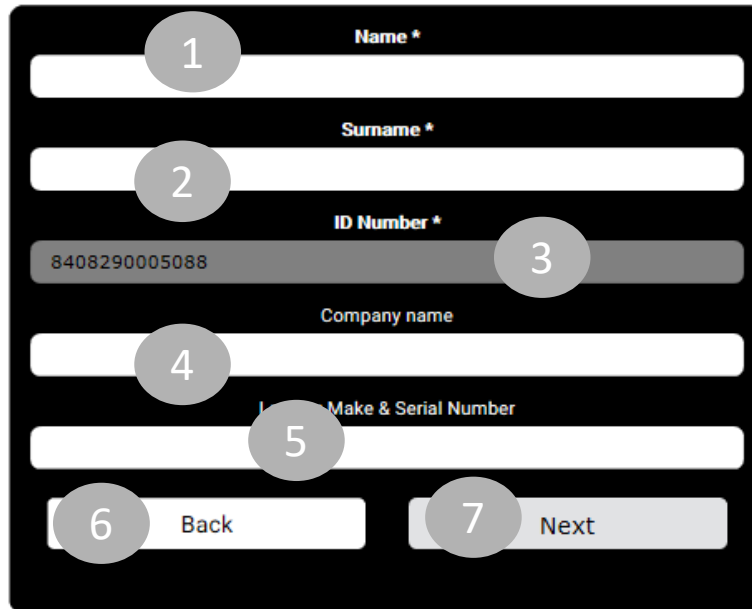
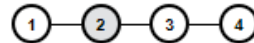
1. **Building:** The building the meeting will take place in. This will differ depending on the selected building.
2. **Email address:** Confirming the visitors email address.
3. **Steps**  this is a 4-step process to complete the pre-registration. We currently completing step 1.
4. **ID number:** Visitor linked to the above email address will enter their ID number (this has to be a valid ID number, the system will pick up if it is a fake ID number) or
5. **Passport number:** If the visitor linked to the above email address does not have a South African ID number, they can enter their passport number. (This has to be a valid passport number the system will pick up if it is a fake passport number).
6. **Next:** Continue to the next steps.

Visitor pre-registration

2 First Place

You are pre-registering with the following email:

tanjawentz@gmail.com



1 **Name ***

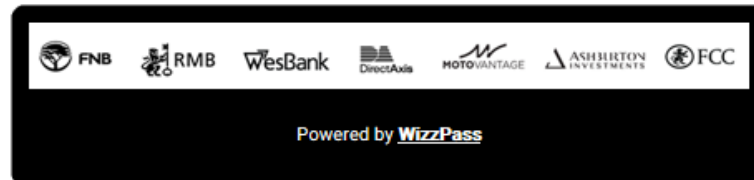
2 **Surname ***

3 **ID Number ***
8408290005088

4 **Company name**

5 **Laptop Make & Serial Number**

6 **Back** 7 **Next**



Visitor pre-registration step 2

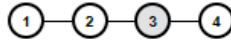
1. **Name:** Compulsory field. The name of the visitor linked the ID or passport number entered in step 1.
2. **Surname:** Compulsory field. The surname of the visitor linked the ID or passport number entered in step 1.
3. **ID number:** This is the ID number entered in step 1 (if they want to change the ID number, they will have to go back to step 1).
4. **Company name:** This is not a compulsory field. If your visitor will be representing a company, they will need to enter your company details.
5. **Laptop: Make and serial number:** This is not a compulsory field. Only if the visitor will be taking a laptop to the meeting. This is to ensure the visitor will be able to remove the laptop from the premises at the end of the meeting.
6. **Back:** Go back to step 1
7. **Next:** Continue to step 3

Visitor Pre-registration

2 First Place

You are pre-registering with the following email:

tanjawentz@gmail.com



FIRSTRAND DISCLAIMER AND TERMS & CONDITIONS

2

1

☐ 6 months

Please sign either with your mouse or finger or stylus in the box below:

3


4

Tanja Stewart | Oct 16 [Clear Signature](#)

5

6

Back Submit



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Visitor pre-registration step 3

FIRSTRAND DISCLAIMER AND TERMS AND CONDITIONS

- Scroll:** Visitor will need to read though the terms and conditions, they have an option to scroll up and down.
- Term:** They will need to select the period that their data can be stored from their last interaction (This is compulsory and they have to select one of the suggested answers.

Please select the period that your data can be stored for from your last interaction.

- ☒ Up until and including the day of the meeting
- ☐ 3 months
- ☐ 6 months

- Signature:** Using their mouse they will sign the terms and conditions.
- Clear signature:** Should they want to redo their signature they must select clear signature to redo their signature using their mouse.

They will also have an option to have this agreement emailed to their email address.

☒ Send me a copy of this agreement to:

visitor@gmail.com

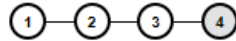
- Back:** Go back to step 2
- Next:** Continue to step 4

Visitor Pre-registration

2 First Place

You are pre-registering with the following email:

tanjawentz@gmail.com



Thank you. Your pre-registration is complete.



Enjoy your visit.

1 Reserve parking **Not Reserved**

2 Show directions

3 Add more attendees

You can review your details by clicking [here](#)



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Visitor pre-registration step 4

The Pre-registration is now complete.

This step covers the additional information that your visitor may need:

1. **Reserve parking:** This is advised if the visitor will be driving themselves (not making use of public transport). Public parking is very limited and risky.
2. **Show directions:** Directions if your visitor has not been to specific FirstRand buildings before.
3. **Add more attendees:** The visitor can inform the organiser that there are additional attendees coming to the meeting.

We will be covering the above options in detail in the following pages



Visitor parking bay reservation

2 First Place

You are reserving a parking bay with the following email:

tanjawentz@gmail.com

BOOKING DETAILS FOR YOUR VISIT ON 11:00 - 11:30

Do you wish to reserve a parking bay?

1

☐ YES

☐ NO

Car Registration

2

Note: Parking is assigned to you and your Identity / Passport number and if your car details change at the last moment we will still be able to accommodate your original booking.

3

Save

Visitor parking bay reservation

1. **Do you wish to reserve a parking bay?** They would select yes if they will be driving to the meeting.
2. **Car registration:** the registration number of the vehicle they will be traveling in. TAKE NOTE the parking is assigned to their ID number so should the car change last minute they would not need to update that.
3. **Save:** Select save to complete the parking reservation.

The message will be shown on successful parking booking.
Select done to complete to return back to the menu.

BOOKING DETAILS FOR YOUR VISIT ON 11:00 - 11:30

Thank you.

Your parking has now been booked. Please use the reference number **bd79ca** when you come to site. This reference number can be obtained on your booking confirmation email that you received or by revisiting this space.

Remember to have your Driver's License handy for scanning upon arrival to confirm the details of your visit.

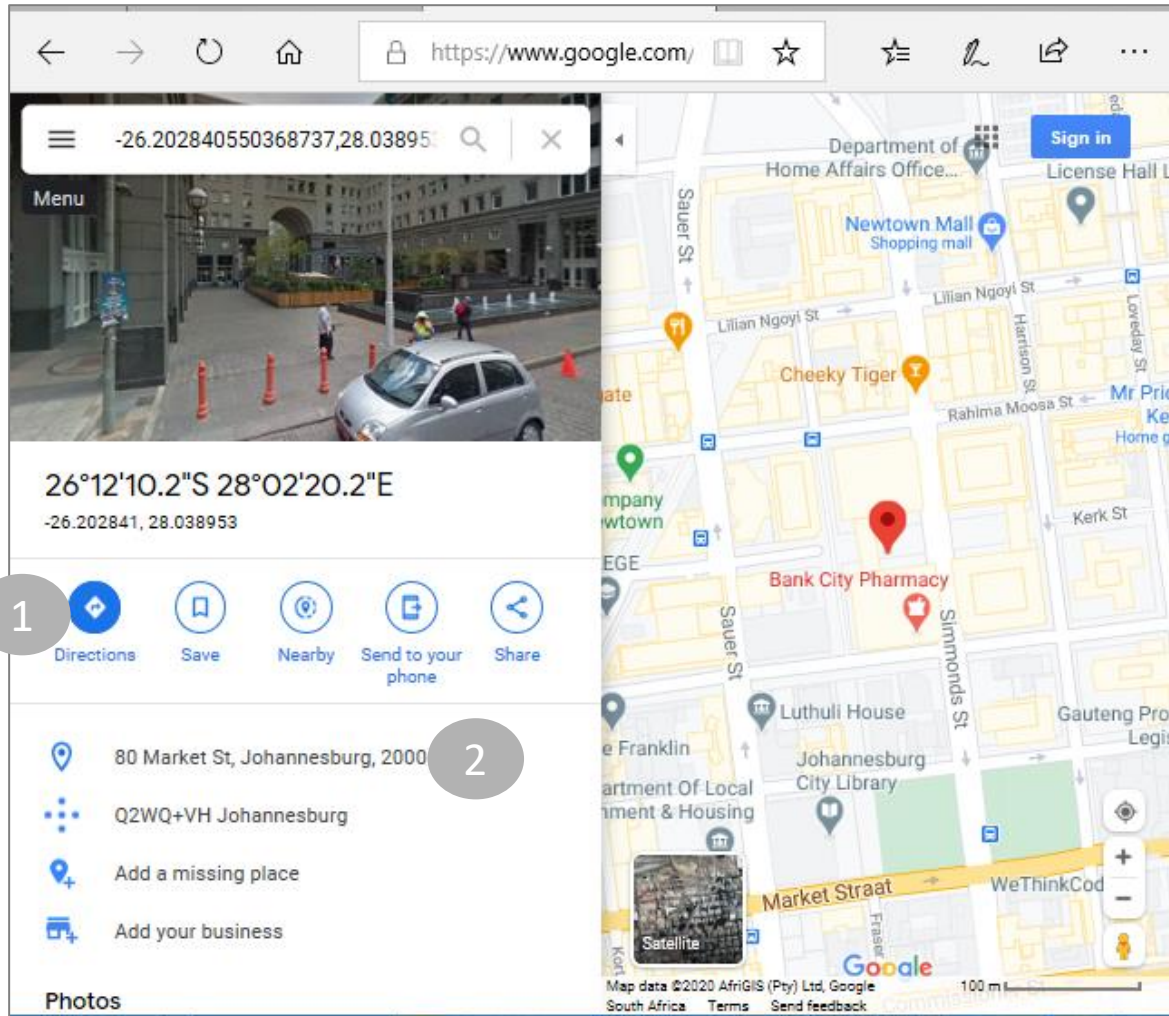
Upon arrival you will be assisted by a member of our security staff who will point you in the right direction.

Please do not leave any valuables in your parked car.

Enjoy your visit.

To make changes click [here](#).

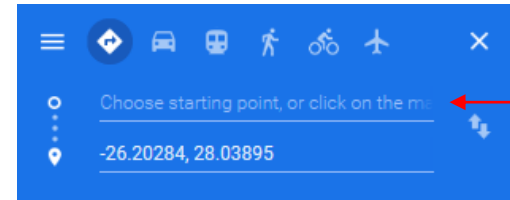
Done



Show directions

Selecting show direction will automatically direct to your default map set-up on your device. In this case it was Google maps.

1. **Directions:** Selecting direction will open the option for them to enter the address they will be traveling from.



2. **Address:** Physical address of the building.



Booking additional attendees

2 First Place

Add additional attendees to be pre-booked

Meeting Date: 2020-10-16 11:00:00

Meeting Subject:
Visitors System Discuss

Location: 2 First Place

Host Name: Tanya Stewart

Email (Required)

Name (

Surname

Add Attendee

Done

Powered by **WizzPass**

Booking additional attendees

1. **Email:** The visitor who has been booked as a visitor can inform the organiser of the meeting to add more attendees to the meeting by entering the email address of the additional attendee (not their own email address – if they can see this they are already registered).
2. **Name:** This is an optional field. The name of additional attendee they want to add to the meeting.
3. **Surname:** This is an optional field. The surname of additional attendee they want to add to the meeting.
4. **Done:** After submitting the system generates an email to the host asking them to add the emails to the meeting manually.

IMPORTANT: Adding attendees here does not guarantee that the additional attendees have been added to the meeting. The organiser still has to add them to the meeting or send them a visitor invite for them to complete their pre-registration process.

You have completed the visitor management module.

