


**Add Visitors (Bulk Entry)**

From the Visitor entry screen you have the option to add Visitor requests individually or in Bulk entry. This can be done by manually adding names or by copying names from a list and pasting them into the bulk entry field.

Names should be entered in the format of 'First name Last name' with one entry per each line. The first value will always be recognized as the 'First name' and the second value will always be recognized as the 'Last name'. Each line should be separated with a line break.

Complete any additional fields as necessary and press 'Submit' button to complete the request. The fields you see are based on your system setup; contact your system administrator if you have any questions

The following are some items to note when adding Bulk Entry Visitor requests:

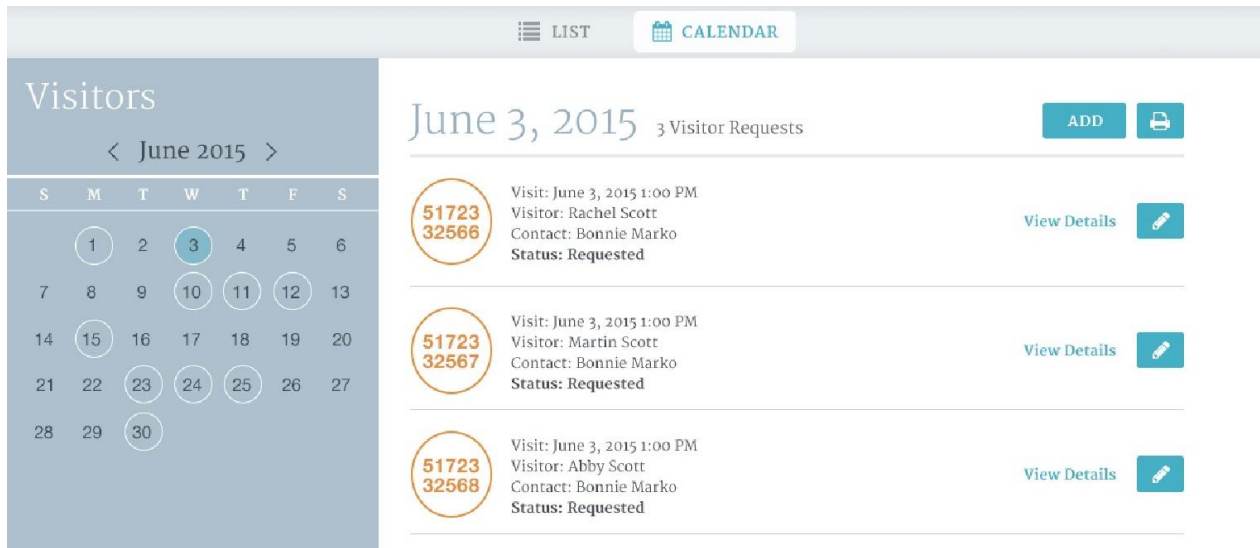
- Fields prefaced with \* are mandatory and must be filled in
- If you see a file link at the bottom of the entry window, you may upload one or more files along with your request. This is helpful if, for instance, if you would like to attach a photo of the Visitor.
- Press **Save** to enter your request. You will see a Visitor Request Number as an indicator that the request was successfully received. In addition, you may get an email confirmation as well.
- Press **Clear** to clear out the values you have entered and start with a blank screen
- The  icon located at the top right is for informational purposes

**Dashboard**

You can add Visitor requests directly from the Dashboard by going to the “Visitor” panel below the notices section. Press the **Add** button to submit a request (see details below). After your request is submitted, you will remain on this screen.

**Visitors**

By selecting the Visitors option, you will be brought to the Visitor screen. From here you have to option to add Visitor requests from both the List view as well as from the Calendar view.



The screenshot shows the 'Visitors' interface. At the top, there are tabs for 'LIST' and 'CALENDAR'. The main area is split into two panels. On the left is a calendar for June 2015, with the 3rd of June highlighted. On the right is a list view for 'June 3, 2015' showing 3 visitor requests. Each request entry includes a circular ID badge (e.g., 51723 32566), the visit time (June 3, 2015 1:00 PM), the visitor's name, the contact name, and the status (Requested). Each entry also has a 'View Details' link and an edit icon.

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Date	Time	Visitor Name	Contact	Status	Actions
June 3, 2015	1:00 PM	Rachel Scott	Bonnie Marko	Requested	View Details, Edit
June 3, 2015	1:00 PM	Martin Scott	Bonnie Marko	Requested	View Details, Edit
June 3, 2015	1:00 PM	Abby Scott	Bonnie Marko	Requested	View Details, Edit


Click the ‘Add’ button to add a Visitor request. Complete any fields as necessary when submitting Visitor requests. The fields you see are based on your system setup; contact your system administrator if you have any questions.

# Add Visitor Request




\* **First Name**

\* **Last Name**

\* **Expected Date**    :

HH MM

\* **Expiration Date**    :

HH MM

**+ Add Another Person**

\* **Contact**

\* **Contact Phone Number**

\* **Visitor Type**

**Call on Check In**


**Instructions**

Upload Files *image, pdf, or document*

**CHOOSE**

**Save** **Clear**

The following are some items to note when adding Visitor requests:

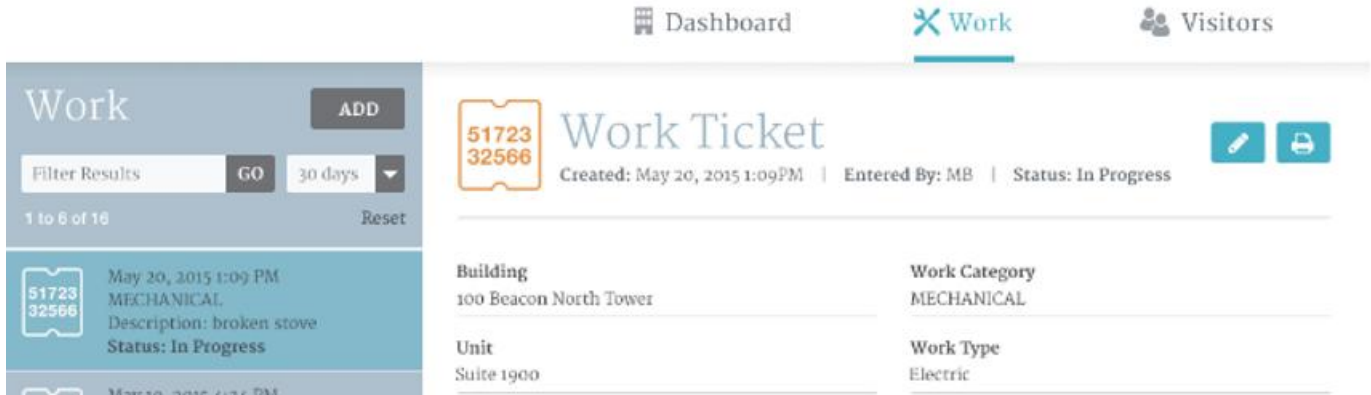
- Fields prefaced with \* are mandatory and must be filled in. Please note – you also MUST include an expiration time. The expiration date/time should be set to the latest this visitor should be allowed in the building.
- If you see a file link at the bottom of the entry window, you may upload one or more files along with your request. This is helpful if, for instance, if you would like to attach a photo of the Visitor.
- Press **Save** to enter your request. You will see a Visitor Request Number as an indicator that the request was successfully received. In addition, you may get an email confirmation as well.
- Press **Clear** to clear out the values you have entered and start with a blank screen
- The  icon located at the top right is for informational purposes

**Dashboard**

You can add Work requests directly from the Dashboard by going to the “Work” panel below the notices section. Press the **Add** button to submit a request (see details below). After your request is submitted, you will remain on this screen.

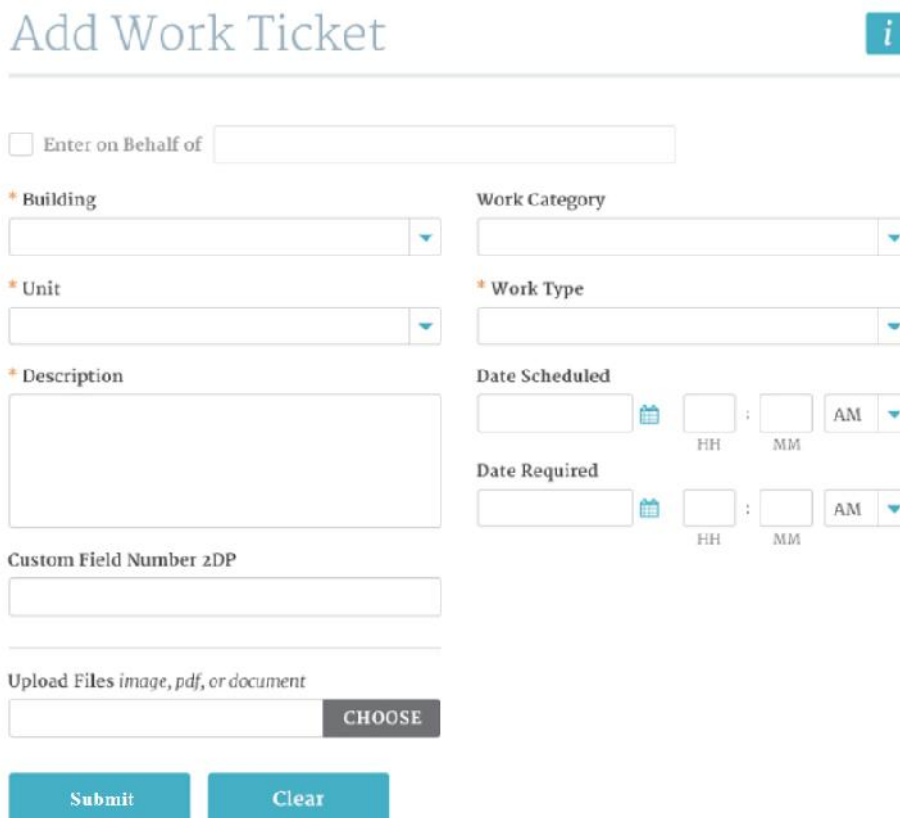
**Work**

From the Dashboard click the  Work button to access the work screen.



The screenshot shows the 'Work' section of the dashboard. On the left, there is a 'Work' panel with an 'ADD' button, a 'Filter Results' input, a 'GO' button, and a '30 days' dropdown menu. Below this, it shows '1 to 6 of 16' and a 'Reset' button. A list of work tickets is displayed, with one selected: '51723 32566' created on 'May 20, 2015 1:09 PM', category 'MECHANICAL', and description 'broken stove'. The main area shows the details for this ticket: 'Work Ticket 51723 32566', 'Created: May 20, 2015 1:09PM', 'Entered By: MB', and 'Status: In Progress'. Below this, there are two columns of details: 'Building: 100 Beacon North Tower', 'Unit: Suite 1900', 'Work Category: MECHANICAL', and 'Work Type: Electric'.


Click the “Add” icon to add a new Work request. On the Work request form you will see a set of user-defined fields that may vary depending on the division you have selected. If you have questions about the fields that appear, please contact your system administrator.





The 'Add Work Ticket' form includes the following fields and controls:

- Enter on Behalf of
- \* Building
- \* Unit
- \* Description
- Work Category
- \* Work Type
- Date Scheduled  :  AM
- Date Required  :  AM
- Custom Field Number 2DP
- Upload Files *image, pdf, or document*  **CHOOSE**
- Submit** **Clear**


The following are some items to note when adding Work requests:

- Fields prefaced with \* are mandatory and must be filled in
- You may see an *Enter on Behalf Of* option at the top of the form; select this if you wish to indicate another contact within your organization as the requestor.
- Based on the type of work selected, you may see additional fields or instructions appear. Please complete any extra fields where applicable
- If you see a file link at the bottom of the entry window, you may upload one or more files along with your request. This is helpful if, for instance, you are notifying your management company about a repair and have a picture of the damage
- Press **Submit** to enter your request. You will see a Work Number as an indicator that the request was successfully received. In addition, you may get an email confirmation as well.
- Press **Clear** to clear out the values you have entered and start with a blank screen
- Press the 'x' in the top right corner to close the "Add Work" window and return to the view pane
- The  icon located at the top right is for informational purposes

Select the  **Visitor** tab at the top of the screen to go to the Visitor view.

To edit a Visitor request, start by selecting it from the list; the full record will appear to the right. Press the  icon appearing above it to open the record in Edit mode.

The fields you see are based on your system setup; contact your system administrator if you have any questions.



## Visitor Request

Created: May 20, 2015 1:09PM | Entered By: MB | Status: Requested

[Close Edit Mode](#)

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**\* First Name**

**\* Last Name**

**\* Contact**

**\* Contact Phone Number**



**\* Visitor Type**




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Upload Files *image, pdf, or document*

Files


JohnathanAyers.jpg



**\* Expected Date**



:

HH MM

**\* Expiration Date**



:



HH MM


**Call on Check In**


**Instructions**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. In venenatis, nulla non finibus blandit, elit sem euismod ipsum, non facilisis sapien erat ac felis. Aenean a auctor nulla. Donec a lacinia tortor. Phasellus at felis sem. Sed vulputate in metus a tristique. Aliquam finibus sapien velit, eu ullamcorper leo fermentum. Donec vitae fringilla augue, in tempor diam.

The following are some guidelines when editing Visitor requests:

- Fields prefaced with \* are mandatory and must be filled in
- Press **Save** to save your changes
- Press **Clear** to revert back to the values that were last saved for the request
- Press **Close Edit Mode** to cancel out of editing. You will be prompted to confirm this action.
- When Editing Visitor requests, some fields will be linked fields, and some will be free-form text fields. Linked fields will contain a drop down menu from which you can select by pressing the arrow. These fields may constrain other choices based on your selection.
- You can upload files by clicking “Choose”. You can also delete attached files by selecting the  icon
- The  icon located at the top right is for informational purposes

Select the  Work tab at the top of the screen to go to the Work view.

To edit Work, start by selecting a Work request from the list to the left, then press  to edit it.

The fields you see may vary from the entry screen, and may even be different depending on the division you have selected. If you have questions about the fields that appear, please contact your system administrator.

51723  
32566

## Work Ticket

Created: May 20, 2015 1:09PM | Entered By: MB | Status: In Progress

Close Edit Mode

---

**\* Building**

100 Beacon North Tower

**\* Unit**

Suite 1900

**\* Description**

broken stove

**Work Category**

MECHANICAL

**\* Work Type**

Electric

**Date Scheduled**

05/25/2015

📅

03

:

30

PM

▼

HH MM

**Date Required**

05/30/2015

📅

04

:


00

PM

▼

HH MM

The following are some guidelines when editing Work requests:

- Fields prefaced with \* are mandatory and must be filled in
- Press **Save** to save your changes
- Press **Clear** to revert back to the values that were last saved for the request
- When Editing Work requests, some fields will be linked fields, and some will be free-form text fields. Linked fields will contain a drop down menu from which you can select by pressing the arrow. These fields may constrain other choices based on your selection.
- You can upload files by clicking “Choose”. You can also delete attached files by selecting the icon 

**Upload Files** *image, pdf, or document*

CHOOSE

**Files**

brokenstoveimage.jpg

🗑️

brokenstove\_image2.jpg

🗑️


contract\_2015.pdf

🗑️

Save

Clear

### Print Work

This option will only appear if you have selected a Work record from the list to the left. Pressing the  icon will open a new tab displaying the Work request details in a printer-friendly format. You will be prompted to select the printer to send this page to. Close the tab to return to the Work view.

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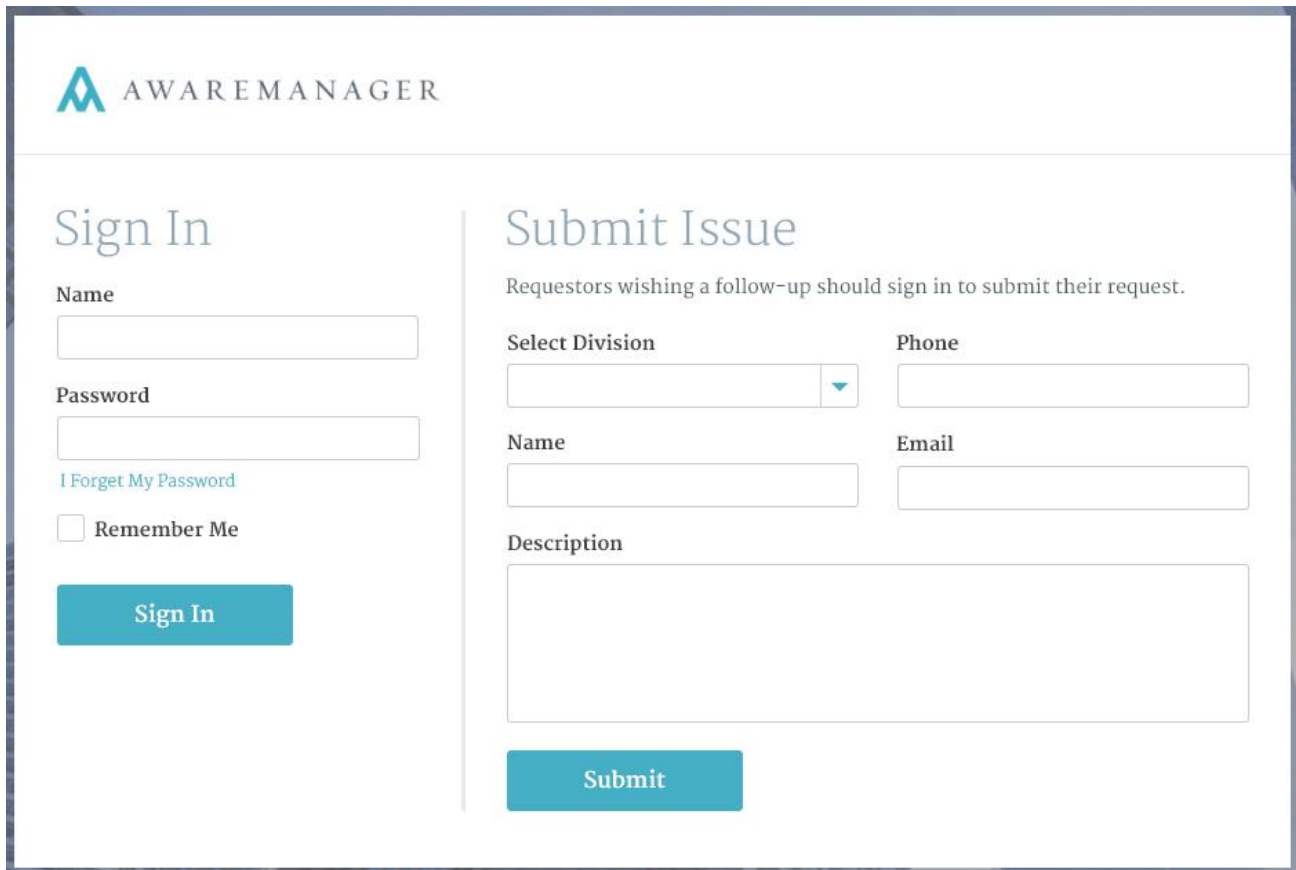
617.542.8555

Suite 67+ Page 1 of 1

## Guest Work Entry

From the sign in screen, guests may submit Work Requests without being required to sign into Gateway. The work request will be routed to the appropriate person based on the Division selected.

**Note: If you have a valid username/password you should sign in to Gateway to enter work requests. This will ensure that you receive the appropriate notifications regarding your requests and will also allow you to track their progress.**



The screenshot displays the 'Sign In' and 'Submit Issue' sections of the Gateway Desktop interface. The 'Sign In' section includes fields for Name and Password, a 'Remember Me' checkbox, and a 'Sign In' button. The 'Submit Issue' section includes a 'Select Division' dropdown, 'Phone' and 'Email' fields, a 'Name' field, a 'Description' text area, and a 'Submit' button. A note above the 'Submit Issue' section states: 'Requestors wishing a follow-up should sign in to submit their request.'

The following are some items to note when adding Guest Entry requests:

- Please be sure to select the correct Division as this will dictate where your work request is routed
- Enter as much contact information as possible (Name, Phone, and Email) to allow responders to follow-up as needed
- Please be as detailed when entering a description to aid in proper routing of your request
- Press **Submit** to enter your request. Upon submission you will see a message appear informing that your request has been successfully entered.


Please contact your system administrator if you are interested in having Guest Entry enabled, or if you have questions on who these requests are routed to.



**Dashboard**

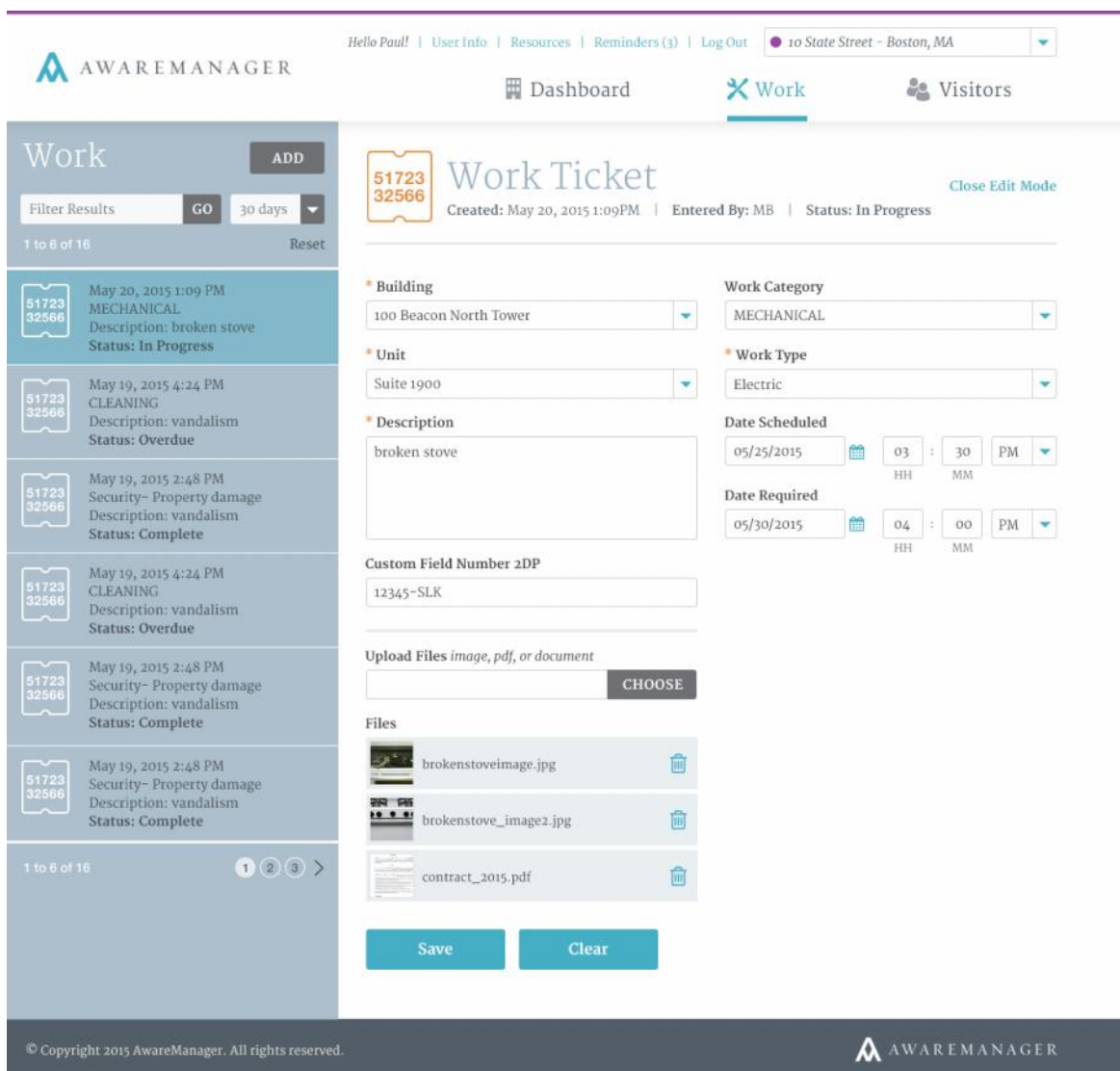
You can view a summary of the most recent Work requests entered on the current day from the Dashboard by going to the “Work” panel below the notices section. Press **See all Work** to go to the full Work list.

**Work**

You can also select the  **Work** tab at the top of your screen to view the full Work list.

From here you will have the option to view Work entered Today, last 7 days, 14 days, 30 days, or 60 days. The Work list will initially show all Work that has been entered in the last 30 days. Click on any record in the Work List to view its full details in the pane to the right.

If you have questions about the details that are visible, please contact your System Administrator.



The screenshot displays the 'View Work' interface in the AwareManager application. At the top, there is a navigation bar with 'Hello Paul!' and links for 'User Info', 'Resources', 'Reminders (3)', and 'Log Out'. The location is set to '10 State Street - Boston, MA'. Below this, there are three main tabs: 'Dashboard', 'Work' (which is active), and 'Visitors'. The 'Work' tab shows a list of tickets on the left and a detailed view of a selected ticket on the right. The selected ticket is '51723 32566', created on May 20, 2015, at 1:09 PM, entered by 'MB', and is currently 'In Progress'. The form fields include:
 

- Building:** 100 Beacon North Tower
- Unit:** Suite 1900
- Description:** broken stove
- Work Category:** MECHANICAL
- Work Type:** Electric
- Date Scheduled:** 05/25/2015 03:30 PM
- Date Required:** 05/30/2015 04:00 PM
- Custom Field Number 2DP:** 12345-SLK

 There is also an 'Upload Files' section with a 'CHOOSE' button and a 'Files' list containing:
 

- brokenstoveimage.jpg
- brokenstove\_image2.jpg
- contract\_2015.pdf

 At the bottom of the form are 'Save' and 'Clear' buttons. The sidebar on the left shows a list of other tickets with their dates, times, descriptions, and statuses. The footer contains the copyright notice '© Copyright 2015 AwareManager. All rights reserved.' and the AwareManager logo.

**Administration**

The Gateway desktop application allows users to submit and review requests for Work and Visitors. This document focuses on the administration of Visitor-specific features.

By selecting the Portal Visitor Fields tab within a permission group record, you have the ability to define which Visitor-related fields appear in the Gateway desktop application. For each field you can specify the following:

- Field Name: adding a field name will enable that field to appear in Gateway
- Division: select the division you want the field to appear in (selecting Global will make that field available across all divisions)
- Persistent: this will save your selection within that specific field name for the duration of your current session (For example: if you select “Vendor” under Visitor Type, this will automatically be selected if you enter another Visitor request while still logged in to Gateway)
- Mandatory: requires the field to be filled out before the Visitor request can be submitted
- Add: check this box if you want this field available during entry
- Edit: check this box if you want this field available when editing Visitor requests
- View: check this box if you want this field to be visible when viewing Visitor requests

Field Name	Division	Persistent	Mandatory	Add	Edit	View	Search	List
Expected Date	Global	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Expiration Date	Global	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Call On Check In	Global	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Entered By	Global	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Host: Contact	Global	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Host Phone	Global	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Entered Date	Global	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Instructions	Global	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

All linked fields included will appear as drop-downs/lists to the user. For any linked fields, you can specify which values will be available to the end users by assigning Web Text to these fields. Any fields without web text will not appear as an option in the drop-down menus in Gateway.

Web Text:


Portal Description:

To further constrain what values can be seen in Gateway on an individual basis, Access Groups can be assigned to each user. For more information, please see the reference on Access Groups.

**Dashboard**

You can view a summary of the total expected Visitors for the current day from the Dashboard by going to the “Visitor” panel below the notices section.

**Visitors**

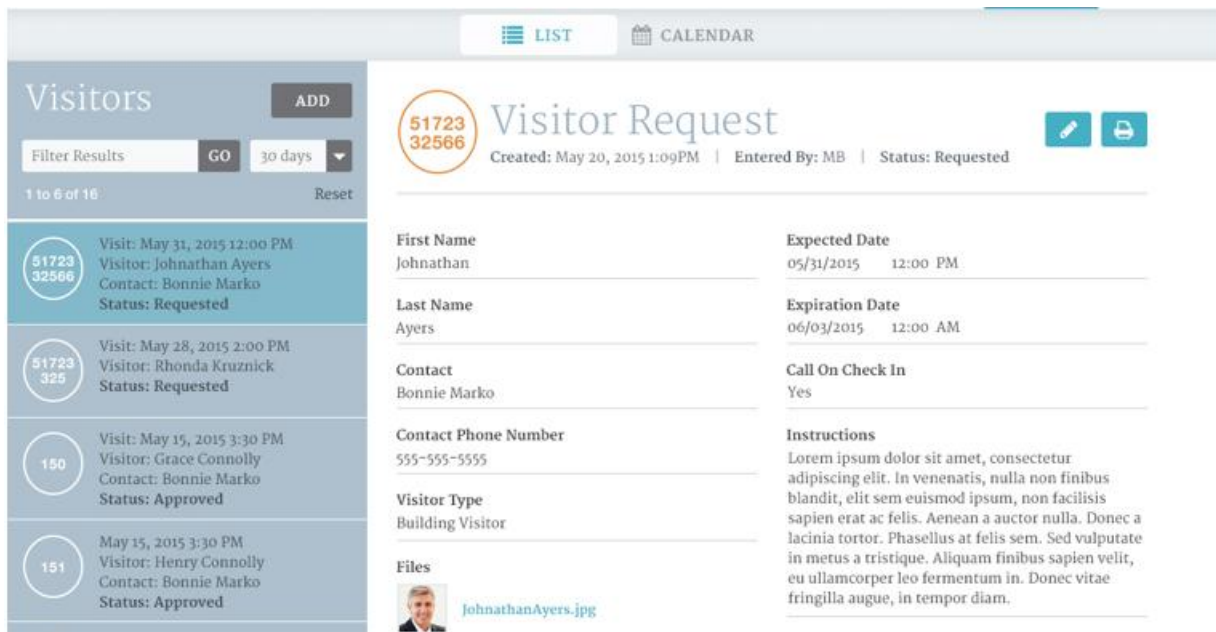
You can also select the  **Visitors** tab at the top of your screen to view the full Visitor list. From here you will have the option to view the Visitors in either a List or Calendar view.

The **List** option will display the following details for each record: Number, Date/Time Expected, Visitor, Host, and Status. Initially, it will show all Visitors that have been entered in the last 30 days.

From the Visitor List, you can search on Visitors in a variety of ways:

- By selecting from the dropdown menu, you can search for visitors expected over the next 7, 14, 30 or 60 days. Selecting an option from the drop down will automatically constrain your list based on the time frame selected.
- The Filter field at the top of the list allows you to further narrow down your results using a keyword search on the list fields (date excluded). Only those with matching text will be displayed in the list after selecting ‘Go’.

Click on any record in the Visitor List to view its full details in the pane to the right.




The screenshot shows the 'Visitors' interface. On the left is a list of visitor records, and on the right is a detailed view of a selected visitor.

Filter Results	GO	30 days
1 to 6 of 16	Reset	

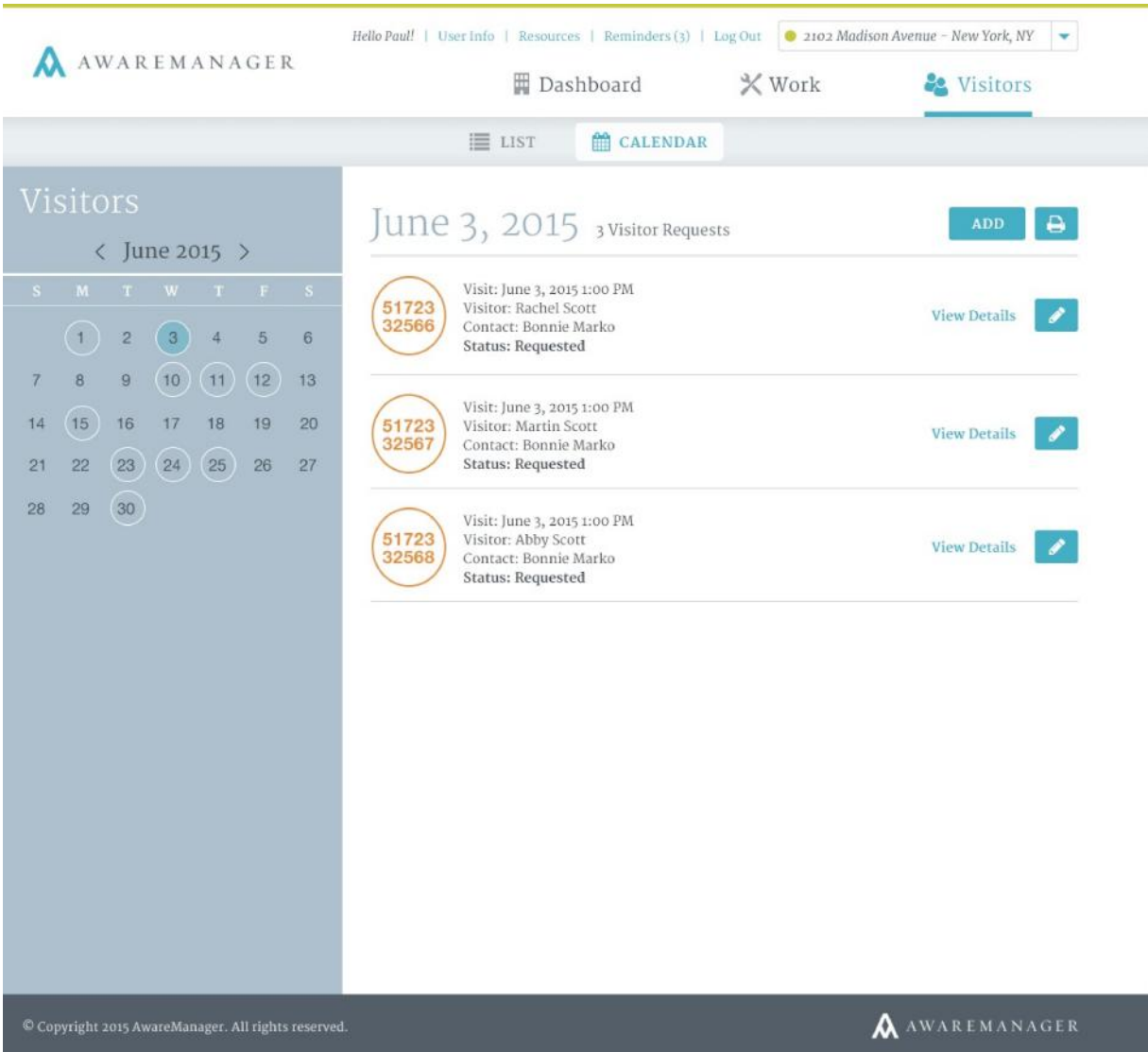
<p><b>51723</b> <b>32566</b></p> <p>Visit: May 31, 2015 12:00 PM Visitor: Johnathan Ayers Contact: Bonnie Marko Status: Requested</p>	<p><b>51723</b> <b>325</b></p> <p>Visit: May 28, 2015 2:00 PM Visitor: Rhonda Kruznick Status: Requested</p>	<p><b>150</b></p> <p>Visit: May 15, 2015 3:30 PM Visitor: Grace Connolly Contact: Bonnie Marko Status: Approved</p>	<p><b>151</b></p> <p>May 15, 2015 3:30 PM Visitor: Henry Connolly Contact: Bonnie Marko Status: Approved</p>
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<p><b>51723</b> <b>32566</b></p> <p><b>Visitor Request</b></p> <p>Created: May 20, 2015 1:09PM   Entered By: MB   Status: Requested</p>	
<p><b>First Name</b> Johnathan</p>	<p><b>Expected Date</b> 05/31/2015 12:00 PM</p>
<p><b>Last Name</b> Ayers</p>	<p><b>Expiration Date</b> 06/03/2015 12:00 AM</p>
<p><b>Contact</b> Bonnie Marko</p>	<p><b>Call On Check In</b> Yes</p>
<p><b>Contact Phone Number</b> 555-555-5555</p>	<p><b>Instructions</b> Lorem ipsum dolor sit amet, consectetur adipiscing elit. In venenatis, nulla non finibus blandit, elit sem euismod ipsum, non facilisis sapien erat ac felis. Aenean a auctor nulla. Donec a lacinia tortor. Phasellus at felis sem. Sed vulputate in metus a tristique. Aliquam finibus sapien velit, eu ullamcorper leo fermentum in. Donec vitae fringilla augue, in tempor diam.</p>
<p><b>Visitor Type</b> Building Visitor</p>	
<p><b>Files</b>  JohnathanAyers.jpg</p>	

By Selecting the **Calendar** option you will be brought to the Calendar view. From here, you can quickly view the days on which Visitors are expected as noted by a circle around the date. By selecting a date you will see all of the expected visitors for that date. The same summary details are displayed for each record: Number, Date/Time Expected, Visitor, Host, and Status.

Select an individual record to view its details in full.



The screenshot displays the AwareManager interface. At the top, there is a user profile for 'Hello Paul!' with links for 'User Info', 'Resources', 'Reminders (3)', and 'Log Out'. The location is set to '2102 Madison Avenue - New York, NY'. The main navigation includes 'Dashboard', 'Work', and 'Visitors'. The 'Visitors' section is active, showing a 'CALENDAR' view. On the left, a calendar for June 2015 highlights the 3rd. The main area shows 'June 3, 2015' with '3 Visitor Requests'. Each request is listed with a circular ID badge (e.g., 51723 32566), the visit date and time (June 3, 2015 1:00 PM), the visitor's name (Rachel Scott, Martin Scott, Abby Scott), the contact name (Bonnie Marko), and the status (Requested). 'View Details' and edit icons are provided for each record.

If you have questions about the details that are visible in View or Edit mode, please contact your Client Manager.

**Administration**

The Gateway desktop application allows users to submit and review requests for Work and Visitors. This document focuses on the administration of Work-specific features.

By selecting the Portal Work Fields tab within a permission group record, you have the ability to define which Work-related fields appear in the Gateway desktop application. For each field you can specify the following:

- **Field Name:** adding a field name will enable that field to appear in Gateway desktop
- **Division:** select the division you want the field to appear in (selecting Global will make that field available across all divisions)
- **Persistent:** this will save your selection within that specific field name for the duration of your current session (For example: if you select “HVAC” under Work Type, this will automatically be selected if you enter another issue while still logged in to Gateway)
- **Mandatory:** requires the field to be filled out before the Work request can be submitted
- **Add:** check this box if you want this field available during entry
- **Edit:** check this box if you want this field available when editing work
- **View:** check this box if you want this field to be visible when viewing work

Field Name	Division	Persistent	Mandatory	Add	Edit	View	Search	List
Client	Global	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Work Person: Work Contact	Global	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Building	Global	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Unit	Global	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Work Type	Global	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Description	Global	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Work Status	Global	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Notes	Global	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

All linked fields included will appear as drop-downs/lists to the user. For any linked fields, you can specify which values will be available by assigning Web Text to these fields. Any fields without web text will not appear as an option in the drop-down menus in Gateway.

Web Text:

Mobile Text:

To further constrain what values can be seen in Gateway on an individual basis, Access Groups can be assigned to each user. For more information, please see the reference on Access Groups.

**Work Search**

The Work list will initially show all Work that has been entered in the last 30 days. From here you also have the option to view work entered Today, in the last 7 days, 14 days, 30 days, 60 days, 90 days, and 365 days.

For each record, the following details will be displayed: Number, Date/Time Entered, Work Type, Description, and Status. Note: the full text of the description will not display here.



From the Work List screen you can search on Work in a variety of ways:

- By selecting from the dropdown menu, you can search for work entered over the last 7, 14, 30, 60, 90, or 365 days. This will constrain your search results to see all past work entered within the selected time frame.
- The Filter field at the top of the Work screen allows you to further narrow down your list using a keyword search on the list fields (date excluded). Only those with matching text will be displayed in the list after selecting 'Go'.
- By clicking **Advanced Search** you will see a window with additional search fields appear. Enter any criteria and press the **Search** button at the bottom of the window to run the search. Note that this search is separate from the search fields visible from the Work List. Depending on which search you run, you may get different results.

Once you have your search results, click on any record to view it in detail in the pane to the right. If your search returns more than 10 results, you will have to navigate to additional pages in the Work list.

You can also select **Print List** from the Work List to print a summary of all Work displayed in the list. The columns displayed will be aligned with the fields displayed in the Work view.