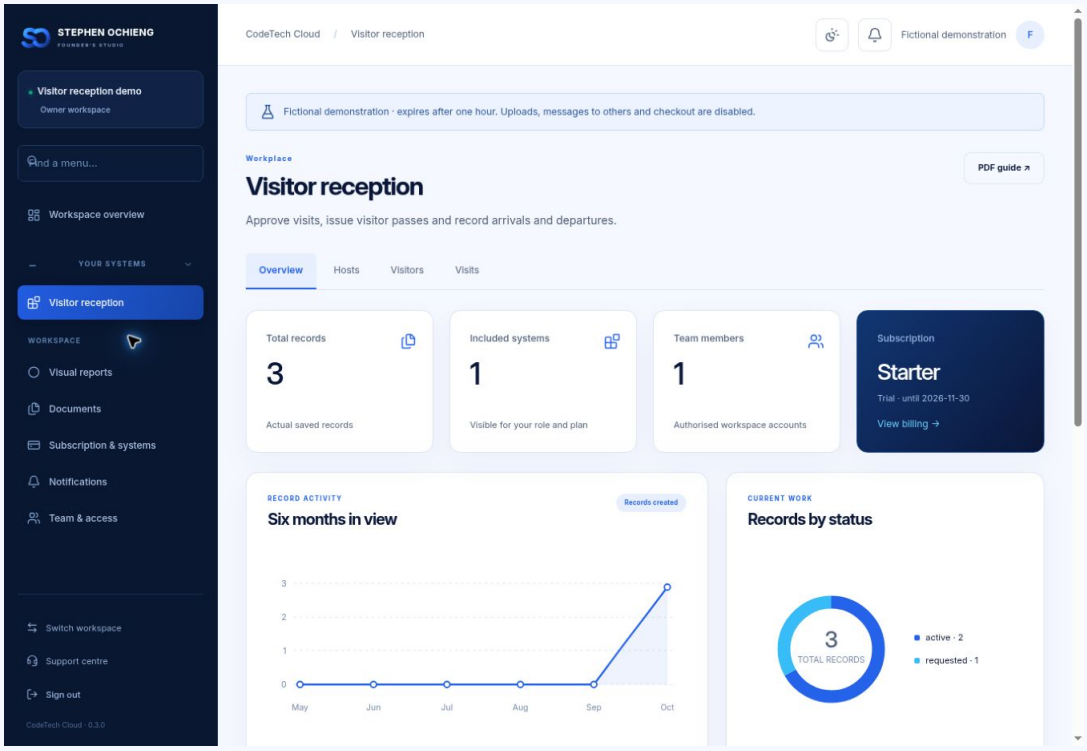
Visitor reception

Workplace / Orientation and scope

Approve visits, issue visitor passes and record arrivals and departures.

THE CORE WORKFLOW

Register a visitor and host, request a visit, approve the slot, check in and check out.



Fictional-data interface capture supplied by the training project. Screen content is illustrative, not live customer activity.

Start with the right workspace

Use a role that permits the intended action. Viewers cannot write. Select the correct organisation, confirm this system is included in its subscription and use test records for your first run. The guide describes the listed core records; advanced sector requirements are evaluated separately.

Prepare the records

Data workbook / Exact fields and input meaning

Hosts

Field	Type	Entry guidance
Host name	Text	Plain text, up to 200 characters.
Work email	Email	A valid email address.
Department	Text	Plain text, up to 200 characters.

Visitors

Field	Type	Entry guidance
Visitor name	Text	Plain text, up to 200 characters.
Email	Email	A valid email address.
Phone	Text	Plain text, up to 200 characters.
Organisation (optional)	Optional text	Optional plain text.

Visits

Field	Type	Entry guidance
Visitor	Reference	Choose from visitors in this workspace.
Host	Reference	Choose from hosts in this workspace.
Visit purpose	Long text	Plain text; up to 12,000 characters.
Expected arrival	Date and time	Date and time. End follows start when paired.
Expected departure	Date and time	Date and time. End follows start when paired.

Apply a valid action

Actions and safeguards / Run the core process

Record	Possible states	Action and result
Hosts	active	No configured state action.
Visitors	active	No configured state action.
Visits	requested, approved, checked in, checked out, cancelled	Approve: requested -> approved (manager) Check in: approved -> checked in Check out: checked in -> checked out Cancel: requested, approved -> cancelled

Core checks to review

- The configured visit workflow links a visitor and host to an expected arrival/departure slot. Review host availability before approval.
- Approve is a manager action; check-in follows approval and checkout follows check-in. Cancellation is configured only from requested or approved.

Use the saved state

The first configured state for visits is "requested". Use the permitted action for the current state and version. A repeated or stale action is rejected. Processed records cannot be edited as if they were still drafts.

> **APPROVAL IS A ROLE CHECK**
>
> Actions marked "manager" require an owner or manager. The module also declares manager checks for approve. An action label is not proof of external payment or approval outside the application.

Check the result

Validation and interpretation / Your first controlled run

1 **Prepare the context**

Create or choose Visitors, Hosts. Confirm that every reference belongs to the selected workspace.

2 **Save visits**

Enter the required fields from the workbook. Inspect the stored record and any server-calculated values before proceeding.

3 **Apply and inspect**

Use approve only from an allowed state. Reload the record and verify its new state and any related stock, capacity or budget effect described in this guide.

4 **Try the protective check**

Try approving two overlapping visits for one host and verify the reservation guard in the accepted build.

Read the records in context

- Read the visitor, host, purpose, expected slot and saved visit state together. A directory record alone is not an arrival.
- Use the visit reference and approved state when evaluating the configured visitor-pass output. A pass is not an identity or security clearance.

> **EVALUATE THE ADVANCED REQUIREMENTS**
>
> Identity verification, turnstiles, physical access control and emergency evacuation integrations need separate evaluation.

For a support request, include the workspace, system, record reference, action, expected result and observed result. Remove passwords, payment secrets and unnecessary personal data.