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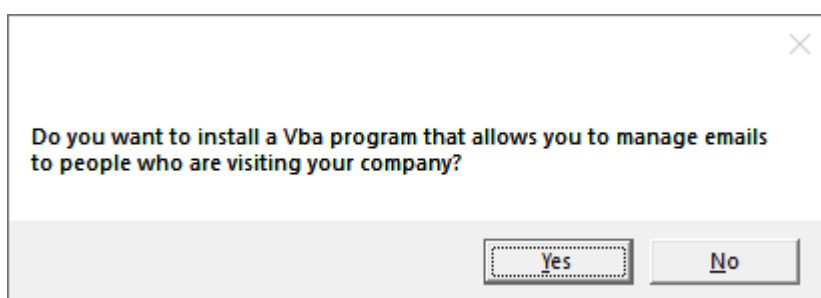
## Visitor Entry Addin for Outlook

### 1 Installing Visitor Entry for Outlook

After you have Extracted all the files from the VisitorSystem.zip file, you are ready to install program. *Please make sure you have closed outlook before continuing.* Note you can only install this program if you are an administrator on the computer. The install program will ask to be elevated to receive administrator privileges and you cannot grant this if you only possess standard user rights.

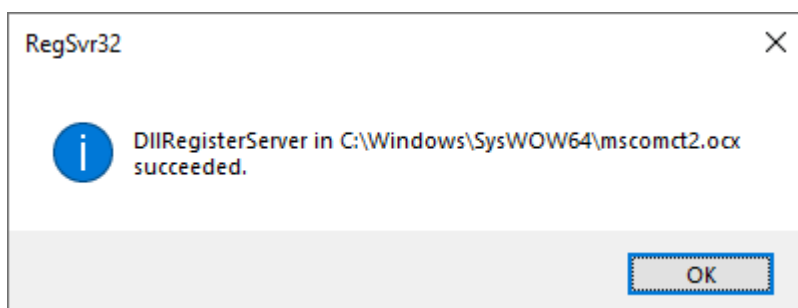
After double clicking Install Outlook Visitor System.vbs a prompt appears that will request you to elevate the program to administrator privileges. Say <Yes> to this prompt.

The next prompt you will get is as follows:

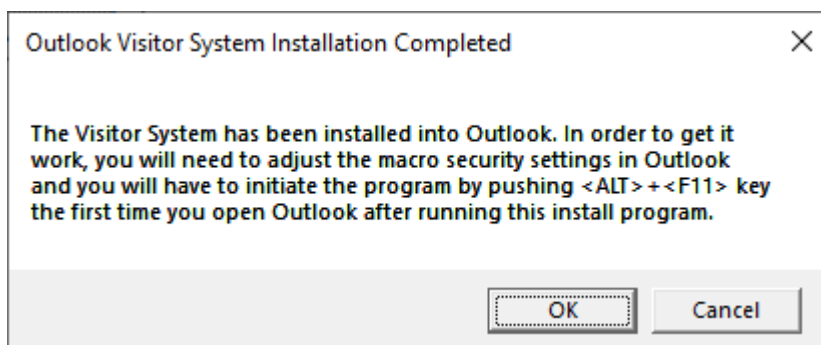


Push the <yes> button to start installation.

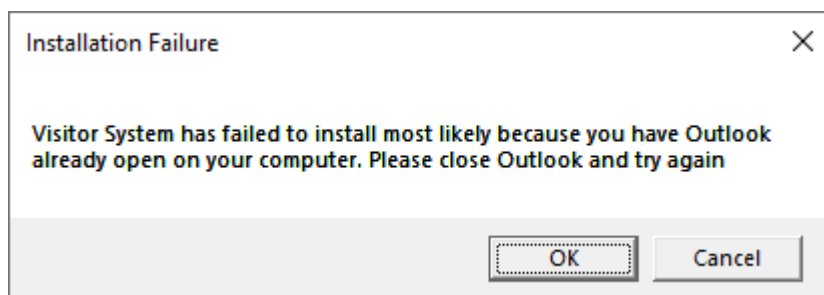
If you are running 32-bit Microsoft office then the next prompt that is likely to appear is the following:



And after you dismiss the installation should complete with the following message

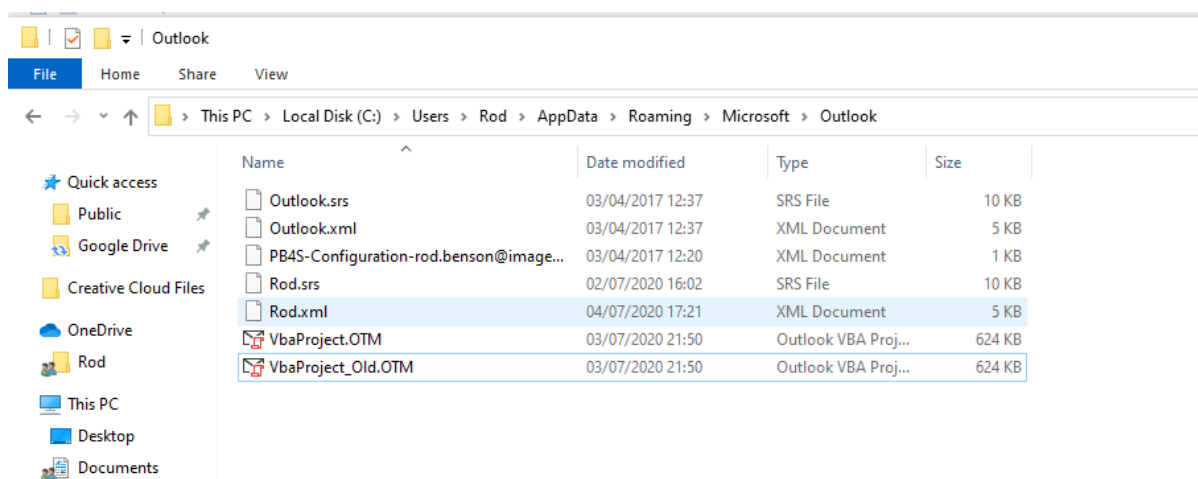


Note if you forgot to close Outlook the program will display the following error



If this happens, simply click OK, close Outlook and restart the installation program.

Unlike other Office programs, Outlook macros are located in a single file called VBAProject.OTM located in Outlooks application data folder. If the installation program finds that this file already exists, it will not delete it but instead rename it to VBAProject\_Old.OTM before copying the VBAProject.OTM file that contains the Visitor system program (Figure 1)



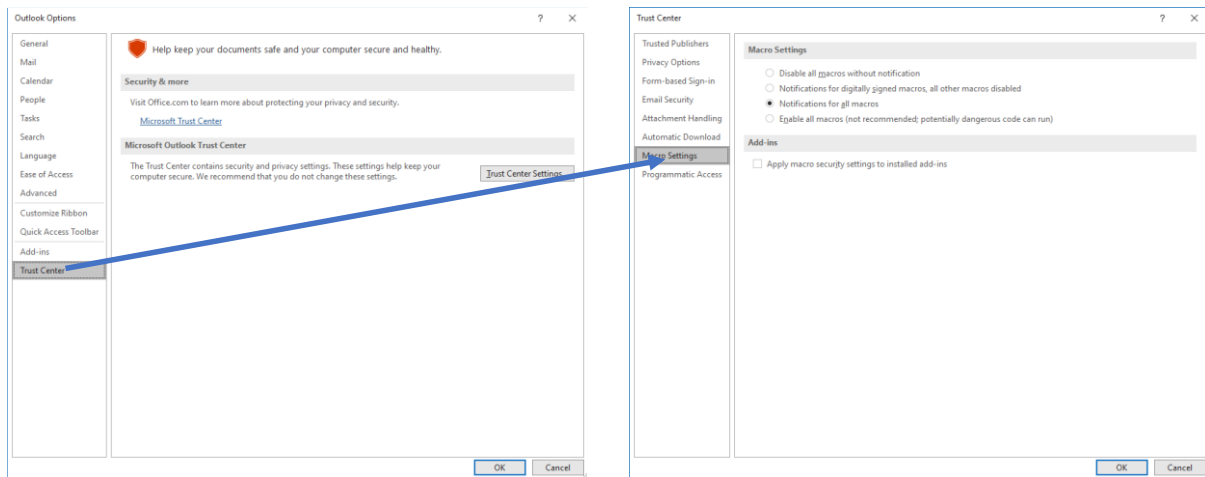
*Figure 1: The Outlook Visitor System program is contained in the file VBAProject.OTM and is saved in the application's data folder. Note that if the install program finds a previous VBAProject.OTM file, it does not delete it but renames it to VbaProject\_Old.OTM as shown in the screen shot above. When it attempts to rename this file, should it find a VbaProject\_Old.OTM file already in existence, it then will first rename that file to VbaProject\_Old2.OTM before renaming the VbaProject.OTM file to VbaProject\_Old.OTM. In fact, the program will do this as many times as necessary so theoretically you could end up with files called VbaProject\_Old.OTM, VbaProject\_Old2.OTM, VbaProject\_Old3.OTM etc. This means that if your Outlook already had user defined macros, they will not be overwritten by the Visitor Entry addin and you can use the uninstall program to get them back.*

*The uninstall program, also included in the VisitorSystem zip file works exactly in reverse deleting the latest VbaProject.OTM file and then renaming the first VbaProject\_Old.OTM file back to VbaProject.OTM and decrementing any other VbaProject\_OldN.OTM files you may have by one.*

The installation program also copies this manual (VisitorEntryAddinforOutlookInstructions.pdf) to your system Documents folder. Once the

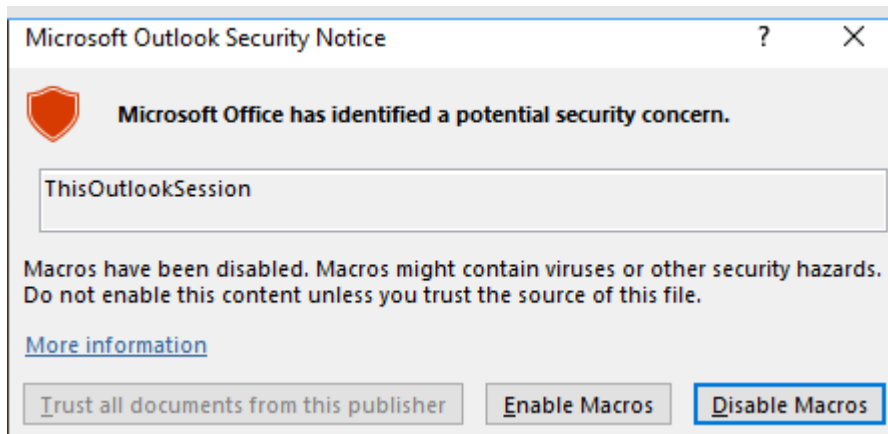
installation program has completed, launch Outlook and go to the File tab. Select Options and then select Trust Center (bottom, left) and click the Trust Center Settings button as shown in Figure 2.

Navigate to Macro Settings and then change the Macro setting to “Notification for all Macros”. This setting does not compromise your security because as you will see Outlook will request you Enable any Macro that is loaded into memory.

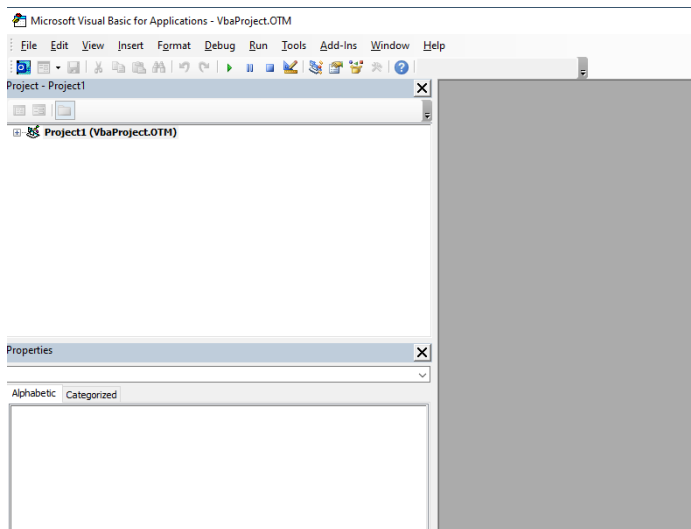


*Figure 2: In the Outlook Options menu, Click on the Trust Center Button to get to the Trust Center menu and then select Macro Settings. Then change the Macro Settings button to Notifications for all Macros.*

Once you have made these changes close Outlook and then relaunch. At relaunch if you get the following message before Outlook loads then the Visitor system is ready to use

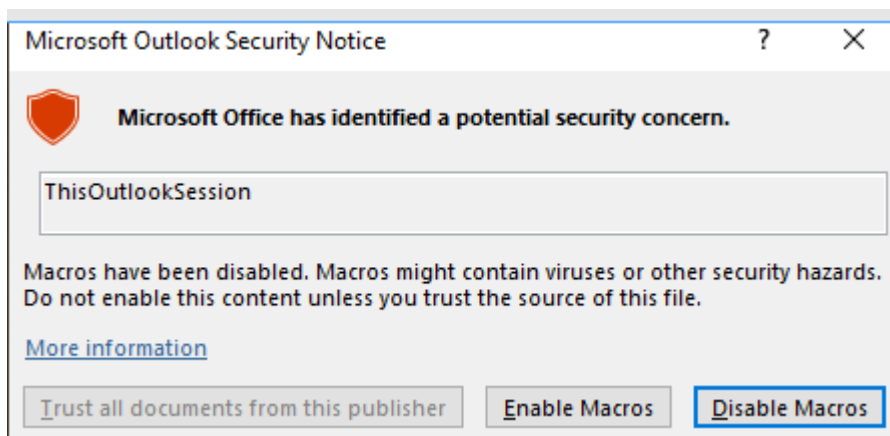


If this message does not appear and when you enter the program there is no “Add-ins” tab, then you need to do one final thing to activate the macro. Push at the same time the <Alt> key and the function 11 <F11> key. The security notice above will now appear and after clicking Enable Macros you will be taken to this window



Simply dismiss this window by clicking the red cross and if the Add-ins menu option is still not visible relaunch Outlook.

Once the program is successfully installed every time you launch outlook you will now get the following warning

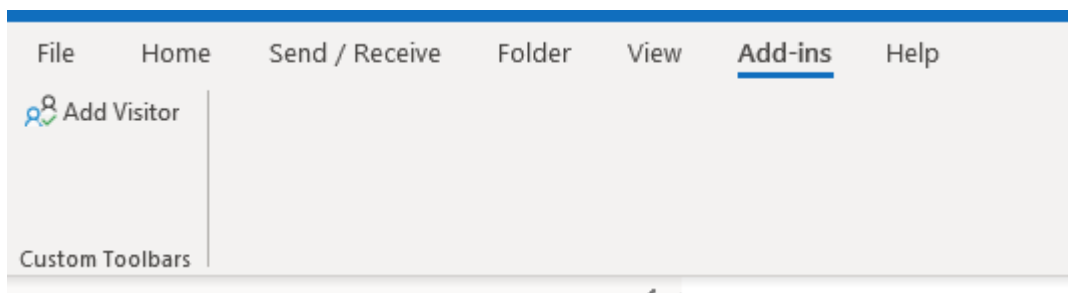


Always simply select Enable macros as this program is entirely safe to use.

## 2 Using the Visitor Management System

### 2.1 Setting up your company information

Go to Add-ins on the main menu bar of outlook and you will see the following button



Push the Add Visitor button and the first time you do this the following menu in Figure 3 will be displayed.

Enter the required and optional information as follows. Normally you will enter your full name in the first box or else if your company has a host that brings people up to you, then enter that person's name.

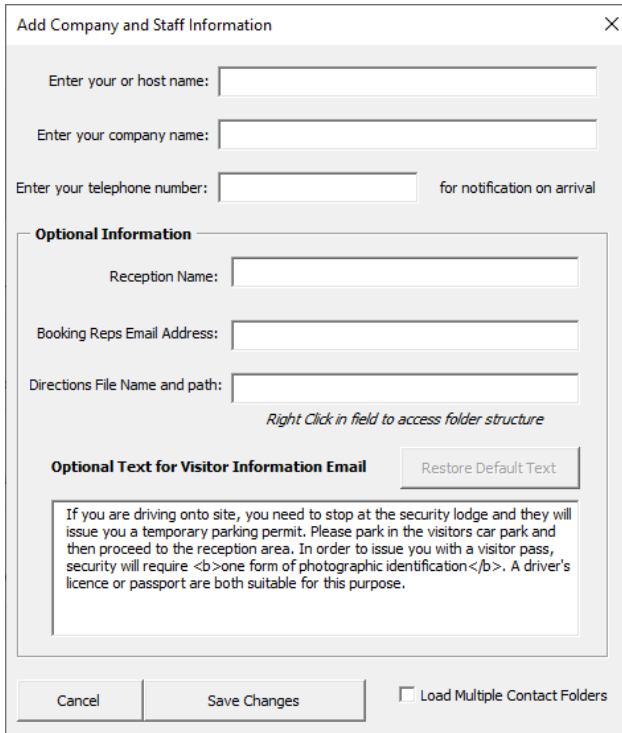
Enter your company name, and your office telephone number so that the front desk can reach you when your host arrives.

If you are on a very large site, with multiple receptions, you can enter the name of reception where your guest will normally come to. Just leave this field blank if you only have a single reception.

If you are required to send an email to your reception desk, then enter the reception desk's email address in the Booking Rep's Email Address. Note if you leave this field blank, then the program will only generate an email for your guests as it has no information about sending an email to your company's reception desk. Obviously if you only work in a small company you may not have a reception desk in which case this functionality of the program is irrelevant to your requirements.

The field "Directions File Name and Path" allows you to specify a company information file which will be attached to emails that go out to your guests. If your company has such a file, enter the path to it here. You can either type it directly, or you can right click the mouse while in the Directions File Name field to bring up a file menu so you can navigate to the correct file (Figure 4).

Finally, you can enter your own optional visitor email text. The newly installed program already has some default visitor text which may or may not be suitable for your requirements. You can either keep the default text, delete it completely and just leave the field blank, or replace it with your own instructions for the visitor. Note this field accepts html formatting codes. In the default text you will see I have included the <b> and </b> characters enclosing the words "one form of photographic identification". These character codes will put the words between them **in bold**. You can also use the paired codes <i>,</i> and <u>,</u> to place text into *italics* and/or underline respectively. These codes of course are entirely optional. The Load Multiple Contacts Folder is discussed later in section 2.3, page 13.



**Add Company and Staff Information** [X]

Enter your or host name:

Enter your company name:

Enter your telephone number:  for notification on arrival

**Optional Information**

Reception Name:

Booking Reps Email Address:

Directions File Name and path:   
*Right Click in field to access folder structure*

**Optional Text for Visitor Information Email**

If you are driving onto site, you need to stop at the security lodge and they will issue you a temporary parking permit. Please park in the visitors car park and then proceed to the reception area. In order to issue you with a visitor pass, security will require <b>one form of photographic identification</b>. A driver's licence or passport are both suitable for this purpose.

☐ Load Multiple Contact Folders

Figure 3: The staff and company information menu where static information that will be used by the visitor management program is entered (see main text for further details). Note if you don't enter your booking rep's email address, then the program will never produce the email shown in Figure 8. In this instance, when you run the program, the "Create Email" button will simply say "OK" and the Add Appointment to Calendar option will be ticked but inactive because if you choose not to generate a visitor instruction email, and there is no rep email address for a front desk booking email, then the only final function you can use is to add the visitor meeting to your appointment calendar.

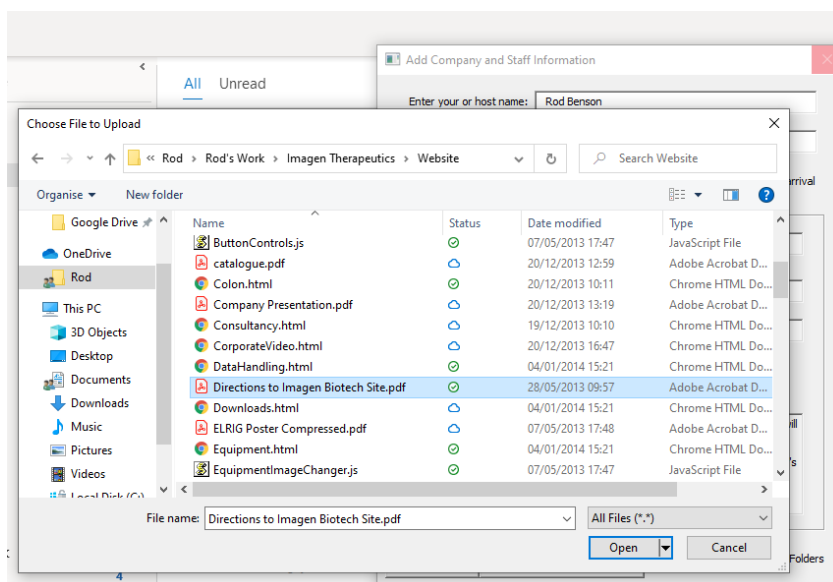
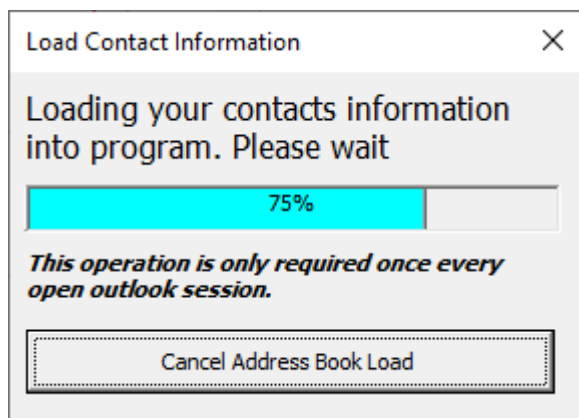


Figure 4: When you are in the Directions File Name field, you can right click the mouse to bring up a file manager window which you can use to select the company document you want to include in the emails to your visitors.

Once you have entered this initial information your form may look something like Figure 5. Click the “Save Changes” button to dismiss this menu and upon doing so the following window will appear.



This information box indicates the progress of loading the contacts from your default Outlook email address database into the visitor management program. The program is going through the default contacts folder and loading all your contacts name, email addresses and company names.

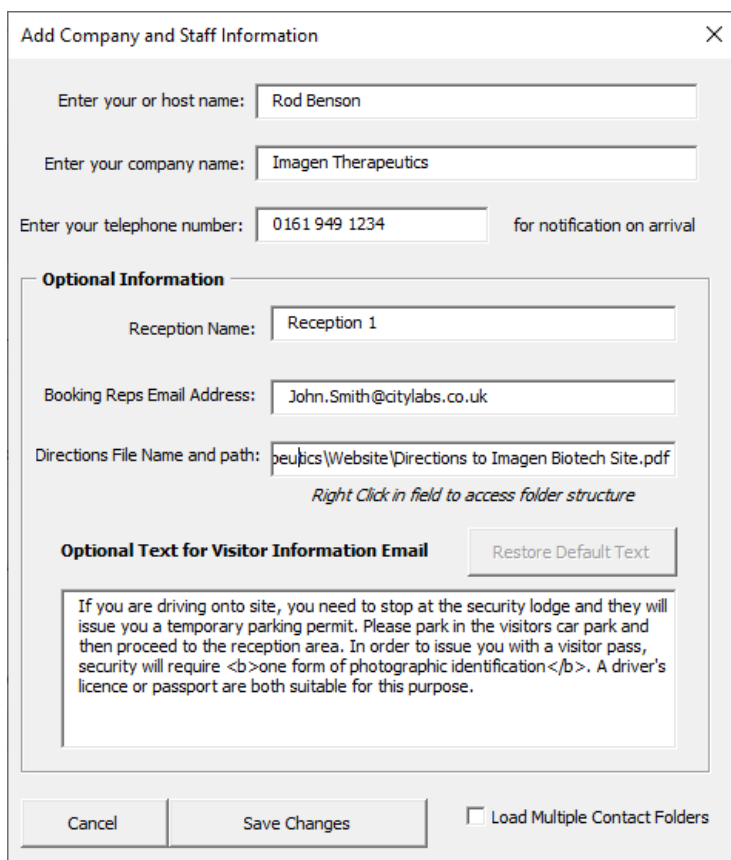
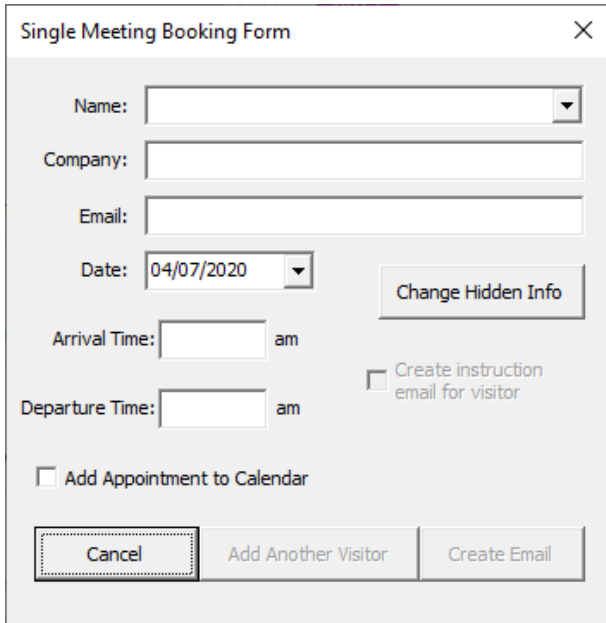


Figure 5: An example of static data saved by the Visitor Management program and used to create the various emails to your reception desk and visitors.



## 2.2 Entering a single visitor example

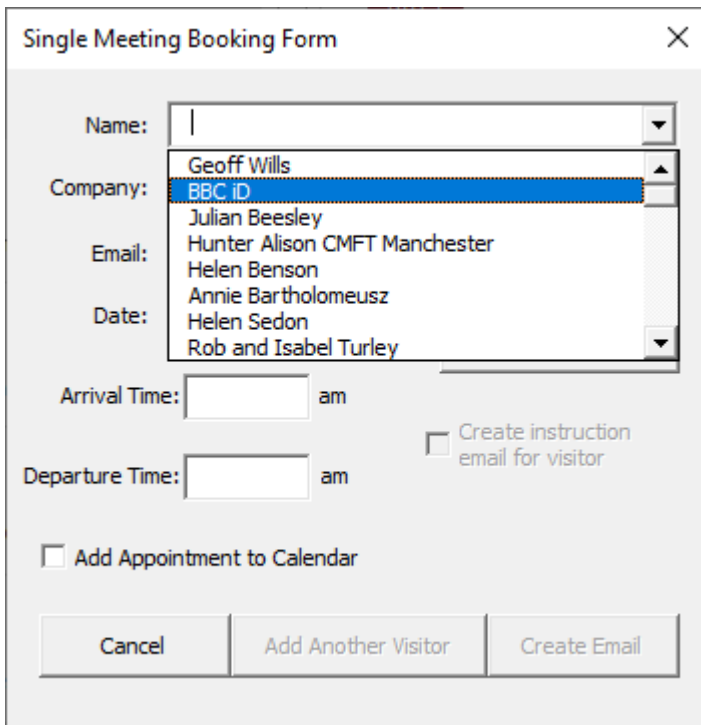
Once it has completed the following window will appear:



The 'Single Meeting Booking Form' window contains the following fields and controls:

- Name:** A dropdown menu.
- Company:** A text input field.
- Email:** A text input field.
- Date:** A date picker showing '04/07/2020'.
- Change Hidden Info:** A button.
- Arrival Time:** A time input field with an 'am' suffix.
- Departure Time:** A time input field with an 'am' suffix.
- ☐ **Create instruction email for visitor**
- ☐ **Add Appointment to Calendar**
- Buttons:** 'Cancel', 'Add Another Visitor', and 'Create Email'.

If you click the arrow of the first drop-down list, you will see that all your contacts from your default contacts folder have been entered into the list box.



The 'Single Meeting Booking Form' window is shown with the 'Name' dropdown menu open, displaying a list of contacts:

- Geoff Wills
- BBC ID** (highlighted)
- Julian Beesley
- Hunter Alison CMFT Manchester
- Helen Benson
- Annie Bartholomeusz
- Helen Sedon
- Rob and Isabel Turley

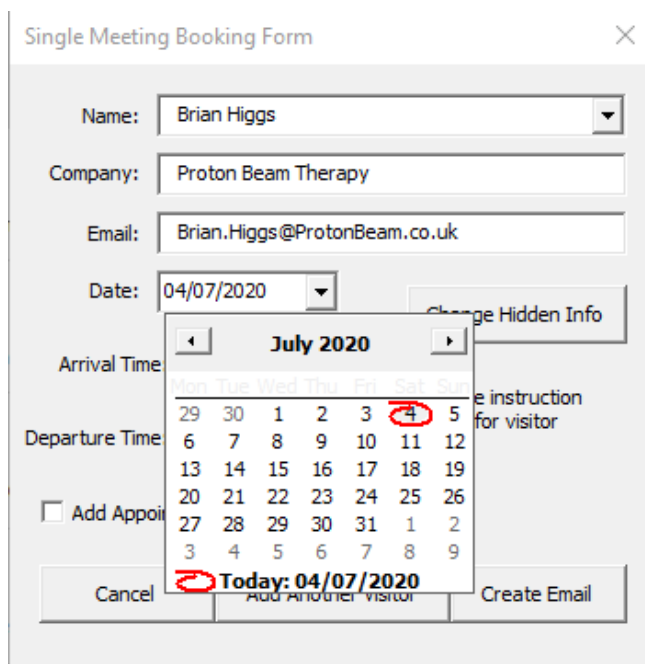
The other fields and controls remain the same as in the previous image.

*Figure 6: The Name dropdown list showing all the contacts that were in your default contact database.*

If you select one of these contacts the company information and their email (assuming this was already in your outlook contact database) will automatically be filled in. You can also at this point type a completely new contact name which is what we are going to do in this

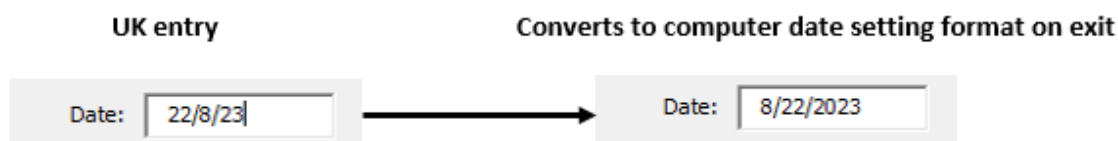
demonstration. Let's enter the new contact Brian Higgs. We can also fill in his company details and his email address as I have done in this made-up example below.

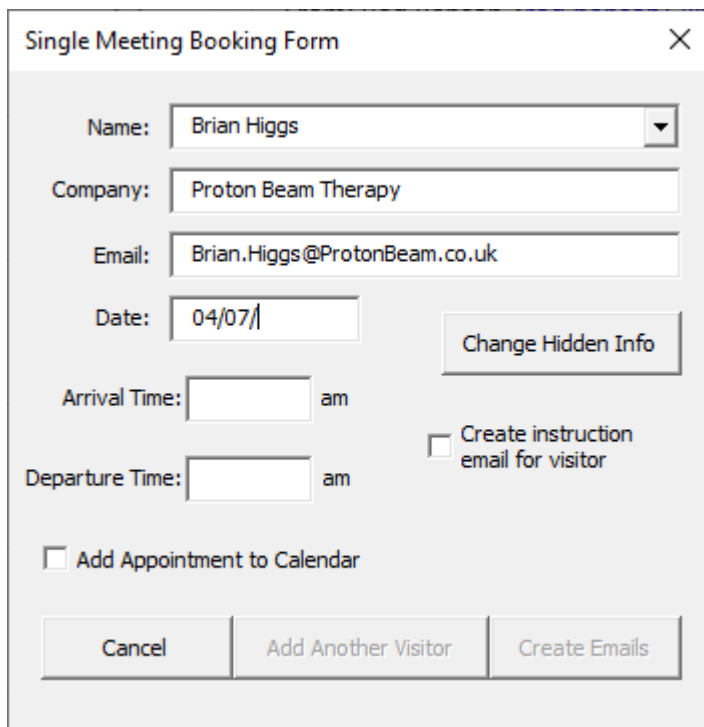
The date field varies depending on whether you have 32-bit or 64-bit Office installed on your system. If you have 32-bit office then in the date dropdown menu, you can select the date of your meeting from the little calendar provided see below. In my current example I shall select the 4<sup>th</sup> of July.



Alternatively, if you have 64-bit office installed then sadly the date field does not provide a drop-down calendar because the driver required to produce this little function is only compatible with 32-bit architecture programs. However, you can still type the date you want in the field and the date field will intelligently help you fill it in the format of a standard UK date by supplying the "/" at the correct points Figure 7.

If you are located in the US, and using the Visitor Entry Addin in 64-bit office, then you will have to get used to typing the dates into the field in the format d/m/y where d=day, m=month and y=year rather than the standard USA format of m/d/y. However, once you have typed the date in using the UK format, as soon as you exit the date field it will be converted to the USA format so when you produce your visitor's email, the date will be a correctly formatted USA date.



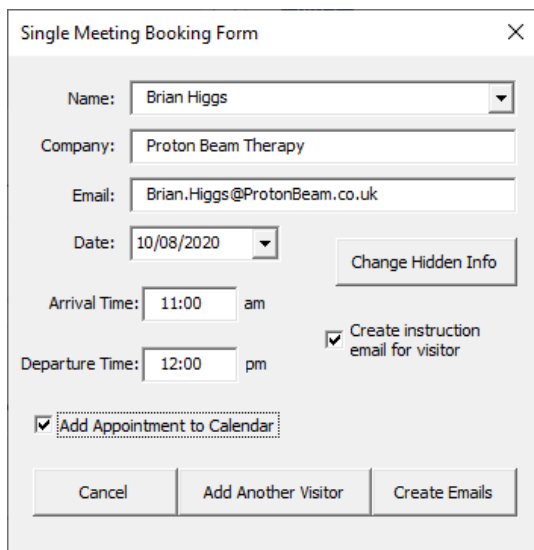


The form is titled "Single Meeting Booking Form" and includes a close button (X). It contains the following fields and controls:

- Name:** A dropdown menu with "Brian Higgs" selected.
- Company:** A text box containing "Proton Beam Therapy".
- Email:** A text box containing "Brian.Higgs@ProtonBeam.co.uk".
- Date:** A text box containing "04/07/". To its right is a button labeled "Change Hidden Info".
- Arrival Time:** A text box with "am" as a suffix.
- Departure Time:** A text box with "am" as a suffix.
- ☐ **Create instruction email for visitor**
- ☐ **Add Appointment to Calendar**
- At the bottom are three buttons: "Cancel", "Add Another Visitor", and "Create Emails".

Figure 7: The Single Meeting Booking form in the 64-bit version of Outlook. Note the date field does not contain the drop-down arrow. Instead, it behaves like a normal text field although it will only accept numbers and the "/" symbol and intelligently helps fill in your date in a UK date format.

I shall now enter the meeting time which runs from 11 am to 12 pm. Note that the am/pm indicator operates on the assumption of a normal working day. If you enter the number 6 it will assume a pm time but the number 7 is assumed to be an early morning AM meeting. This is where the am/pm indicator changes over, along with the obvious midday change from 11 am to 12 pm. If you do decide you want a meeting at 8 pm (or even 3 am??) then you must just accept the programs defaults and then change it manually on the generated emails. In this example, we will also select to generate the visitor instruction email and elect for the program to add this meeting to our Outlook calendar as shown:



The form is titled "Single Meeting Booking Form" and includes a close button (X). It contains the following fields and controls:

- Name:** A dropdown menu with "Brian Higgs" selected.
- Company:** A text box containing "Proton Beam Therapy".
- Email:** A text box containing "Brian.Higgs@ProtonBeam.co.uk".
- Date:** A dropdown menu with "10/08/2020" selected. To its right is a button labeled "Change Hidden Info".
- Arrival Time:** A text box containing "11:00" with "am" as a suffix.
- Departure Time:** A text box containing "12:00" with "pm" as a suffix.
- ☒ **Create instruction email for visitor**
- ☒ **Add Appointment to Calendar**
- At the bottom are three buttons: "Cancel", "Add Another Visitor", and "Create Emails".

We now push the “Create Emails” key and the following emails are generated:

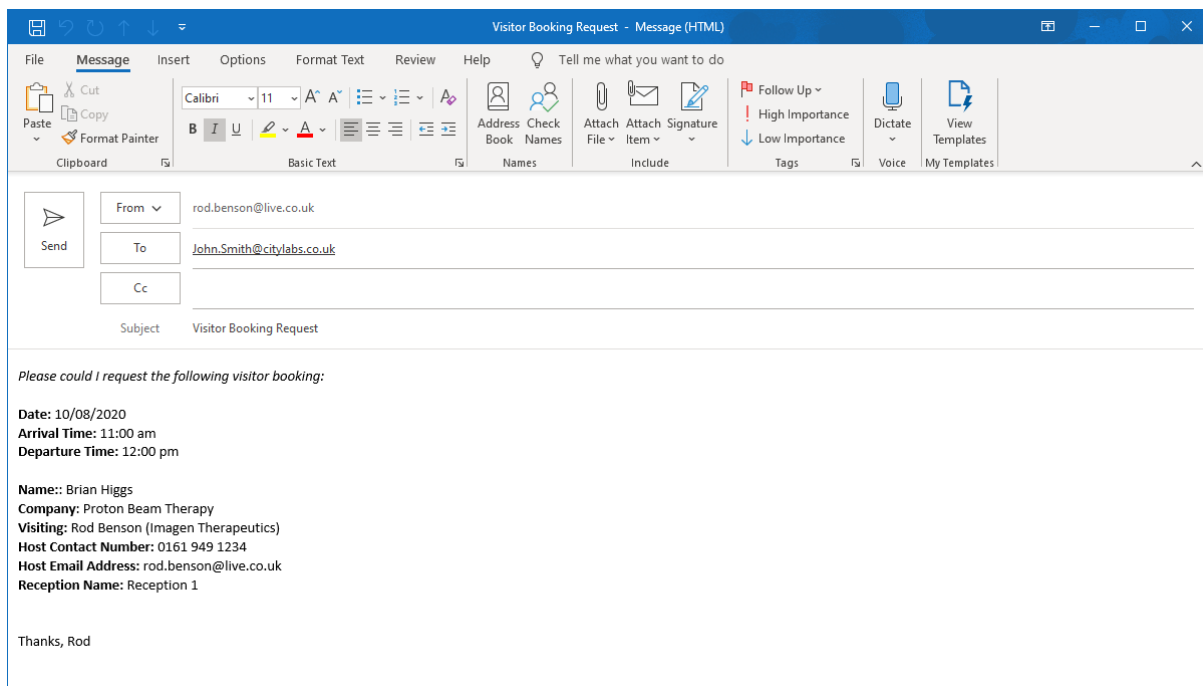


Figure 8: The email generated by the program for your front reception desk.

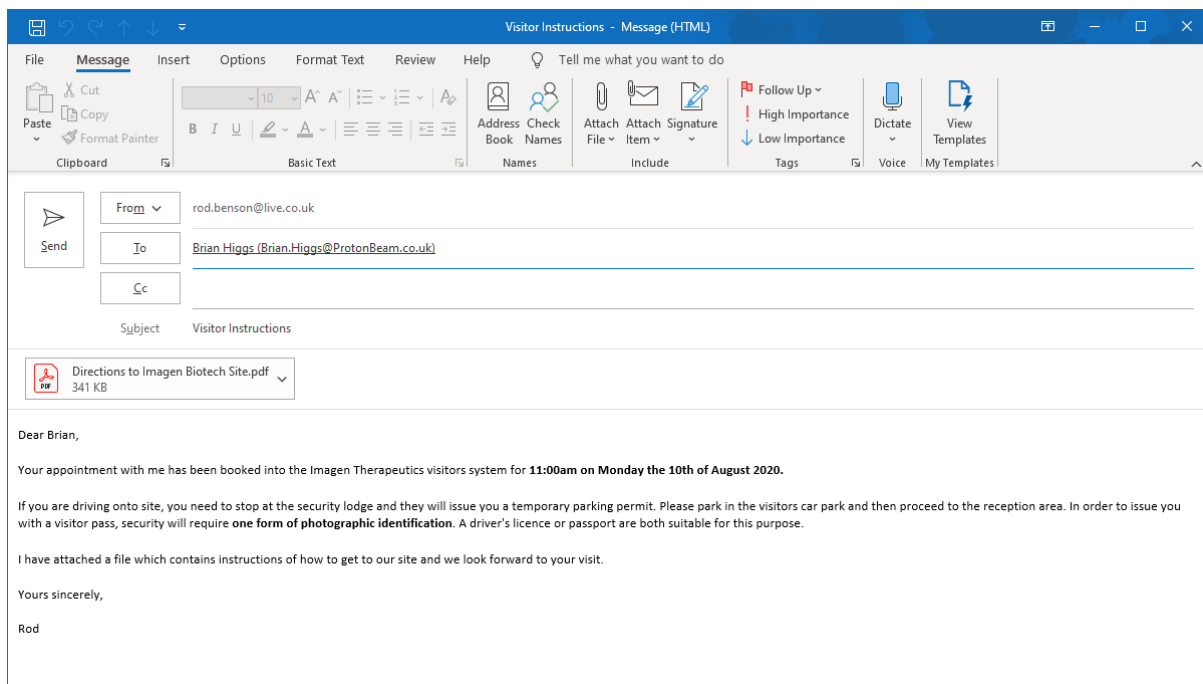


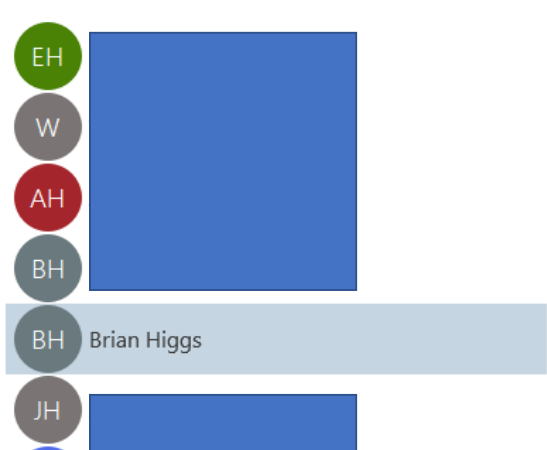
Figure 9: Visitor Instruction email generated which you can immediately send to your visitor complete with attached directions file if you have entered a file path to a company information file.


Once you have sent both these emails, if you now return to your outlook’s default calendar you will also see that the appointment has been added (if you requested it by ticking the “Add Appointment to Calendar” option).

Today < > **10 - 16 August 2020**

|       | Monday   | Tuesday  | Wednesday |
|-------|--|----------|-----------|
|       | 10   | 11       | 12        |
|       | ← From 21 Jul  |          |           |
| 08:00 |  |          |           |
| 09:00 | Reserved   | Reserved | Reserved  |
| 10:00 |  |          |           |
| 11:00 | Rod Benson : Brian Higgs meeting.<br>Imagen Therapeutics |          |           |
| 12:00 |  |          |           |
| 13:00 |  |          |           |
| 14:00 | Reserved   | Reserved | Reserved  |
| 15:00 |  |          |           |
| 16:00 |  |          |           |

Finally, if you go to your default contacts folder, you will see the details of this newly added individual have been added to your outlook contacts so that in the future he will be selectable in the first dropdown menu under in the visitor's name field.





**Brian Higgs**  
✉ Send email    ⋮

**Contact**

Email  
[brian.higgs@protonbeam.co.uk](mailto:brian.higgs@protonbeam.co.uk)

Company  
 Proton Beam Therapy

**Notes**  

✎ Add your own notes here

*Figure 10: The default Outlook Contacts folder showing the newly entered contact Brian Higgs that has been entered into your Outlook contacts via the booking form of the Visitor management program.*

### 2.3 *Loading all contact databases when your Outlook program is accessing multiple email accounts.*

It is possible to set Outlook up so it is simultaneously accessing several email accounts in one session. When configured this way, often you will also have simultaneous access to multiple contact databases. Outlook always has a single account which is its default and, in this instance, the related contact database for that account is also the one that is loaded into the Visitor Management program.

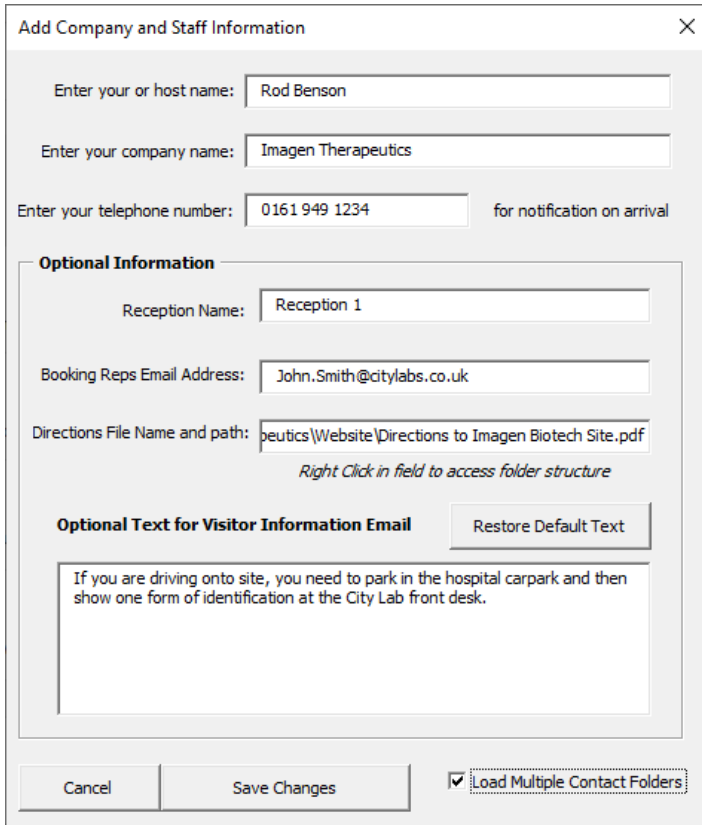
However, if you have many of your key contacts in the contact databases of other email accounts that are also present in your Outlook program, you can set the Visitor Management program to load *all* of your contacts from *all* your email accounts. The way to do this is first to click on Add visitor to bring up the visitor entry menu. Then click the “Change Hidden Info” button to bring up the menu that manages the static information used by the visitor management system (Figure 11). Now tick the option “Load Multiple Contact Folders”. Also in this example, we shall change the default text for the visitor information email to “If you are driving onto site, you need park in the hospital carpark and then show one form of identification as the city lab front desk.” When you do this the Restore Default button will become active. Pushing this button will restore the initial default text of this field should you want to get that text back.

Once you have made both these changes click the “Save Changes” button.

In order to get the program to load all your new contacts, you need to now quit Outlook and restart the program to force it to reaccess your Outlook contact databases as this function is only performed once when you first access the Visitor Management program.

Once you have restarted Outlook and pushed the Add Visitor button, you will see the please wait dialogue message appear but this time its progress bar will repeat its loading sweep a number of times as each one of your contacts databases are loaded into the program.

When it has completed the contact databases load, the normal visitor booking menu screen will be displayed. However, if you look at the “Name” dropdown box, you will noticed there are now the contacts from your other email accounts (compare Figure 6, page 8 with Figure 12, page 14).



Add Company and Staff Information

Enter your or host name: Rod Benson

Enter your company name: Imagen Therapeutics

Enter your telephone number: 0161 949 1234 for notification on arrival

**Optional Information**

Reception Name: Reception 1

Booking Reps Email Address: John.Smith@citylabs.co.uk

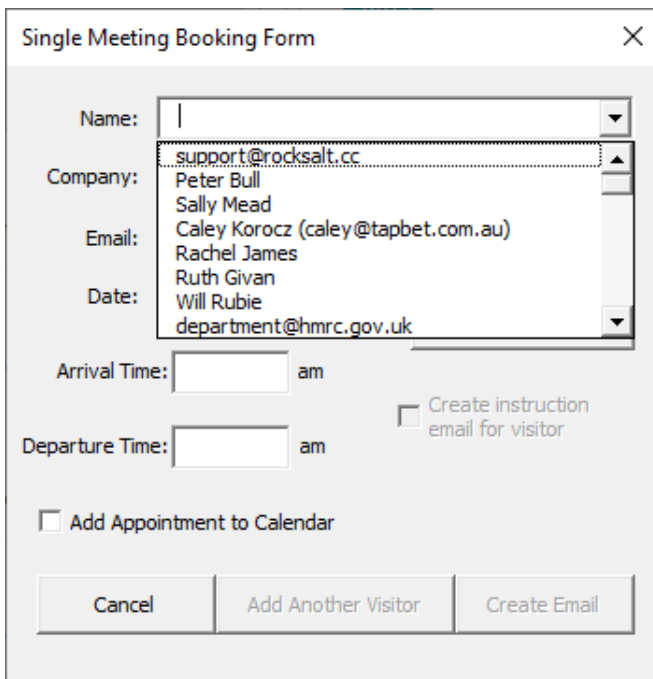
Directions File Name and path: eutics\Website\Directions to Imagen Biotech Site.pdf  
*Right Click in field to access folder structure*

**Optional Text for Visitor Information Email** Restore Default Text

If you are driving onto site, you need to park in the hospital carpark and then show one form of identification at the City Lab front desk.

Cancel Save Changes ☒ Load Multiple Contact Folders

Figure 11: Altering the scope of Outlook contacts loaded from the default contact folder only to all contacts across all email accounts by ticking the “Load Multiple Contacts Folders” option. Note if your Outlook program is only accessing a single email account, then this option has no effect.



Single Meeting Booking Form

Name: [dropdown]

Company: [dropdown menu open showing list]

Email: Caley Korocz (caley@tapbet.com.au)

Date: Will Rubie

Arrival Time: [time field] am

Departure Time: [time field] am

☐ Create instruction email for visitor

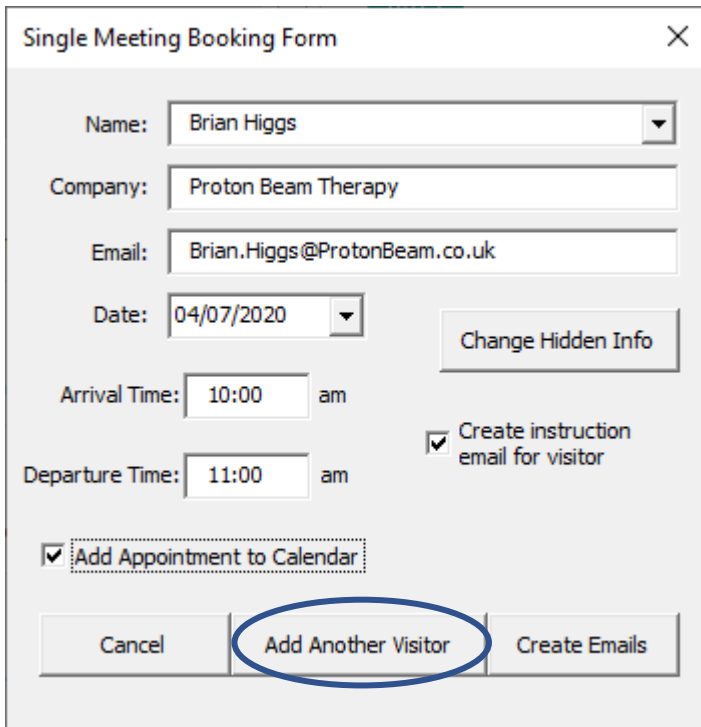
☐ Add Appointment to Calendar

Cancel Add Another Visitor Create Email

Figure 12: The Name dropdown list showing all the contacts that were taken from all your different email account contact databases because, in this example, you have selected the visitor management system to load all contact databases not just the default one..

#### 2.4 Adding multiple visitors to a single meeting form.

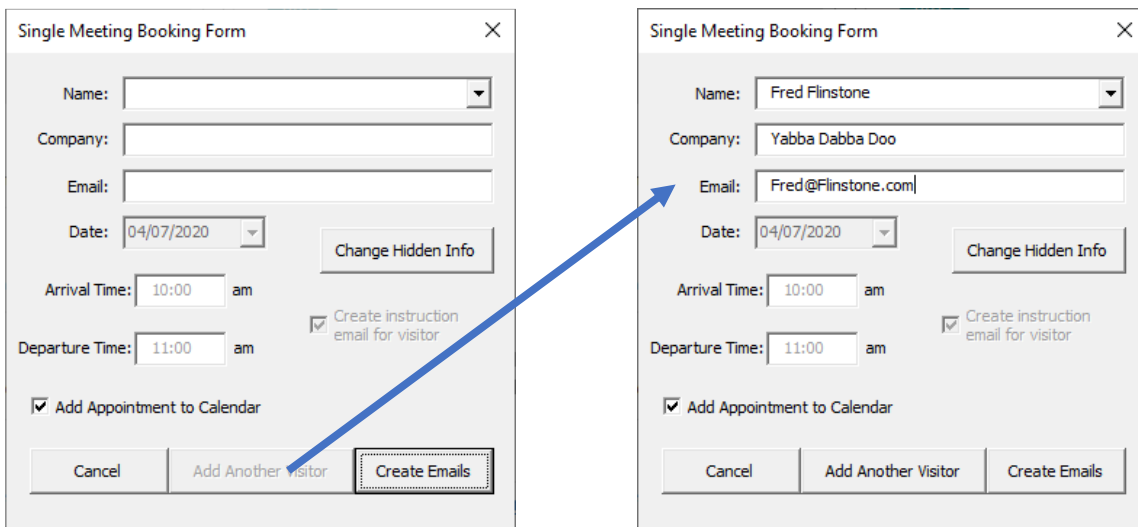
In this final exercise, we shall also demonstrate how the program deals with entering multiple visitors for a single meeting. First, let us enter Brian Higgs again as our first visitor. Let us also indicate that we want to Create an instruction email for each visitor and to add the appointment to our calendar. We will also select today's date, as though this is a hastily arranged visit (or more likely you simply forgot to inform front desk of this appointment you made weeks ago 😊). Because we want to add multiple visitors, this time, rather than pushing the Create Email button, we shall push the Add Another Visitor button.



The form is titled "Single Meeting Booking Form". It contains the following fields and options:

- Name: Brian Higgs (dropdown menu)
- Company: Proton Beam Therapy (text input)
- Email: Brian.Higgs@ProtonBeam.co.uk (text input)
- Date: 04/07/2020 (dropdown menu)
- Arrival Time: 10:00 am (time input)
- Departure Time: 11:00 am (time input)
- Buttons: "Change Hidden Info", "Cancel", "Add Another Visitor" (circled in blue), "Create Emails"
- Checkboxes: ☒ "Create instruction email for visitor", ☒ "Add Appointment to Calendar"

When we do this the Name, Company and Email field are cleared, ready for our next entry while the date, time fields and option fields are disabled as the choices we made for the first visitor are applied to all the other visitors.



The image shows two instances of the "Single Meeting Booking Form" side-by-side. A blue arrow points from the "Add Another Visitor" button in the left form to the right form, illustrating the process of adding a second visitor.

**Left Form (Brian Higgs):**

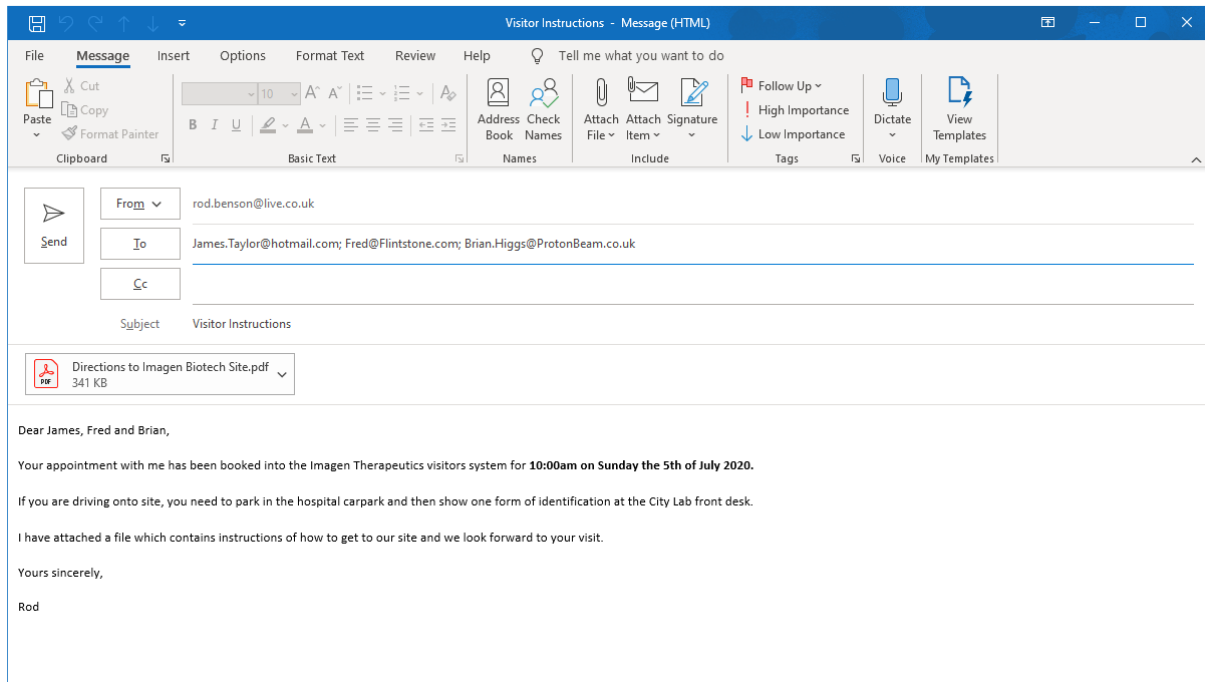
- Name: Brian Higgs (dropdown menu)
- Company: Proton Beam Therapy (text input)
- Email: Brian.Higgs@ProtonBeam.co.uk (text input)
- Date: 04/07/2020 (dropdown menu)
- Arrival Time: 10:00 am (time input)
- Departure Time: 11:00 am (time input)
- Buttons: "Change Hidden Info", "Cancel", "Add Another Visitor", "Create Emails"
- Checkboxes: ☒ "Create instruction email for visitor", ☒ "Add Appointment to Calendar"

**Right Form (Fred Flinstone):**

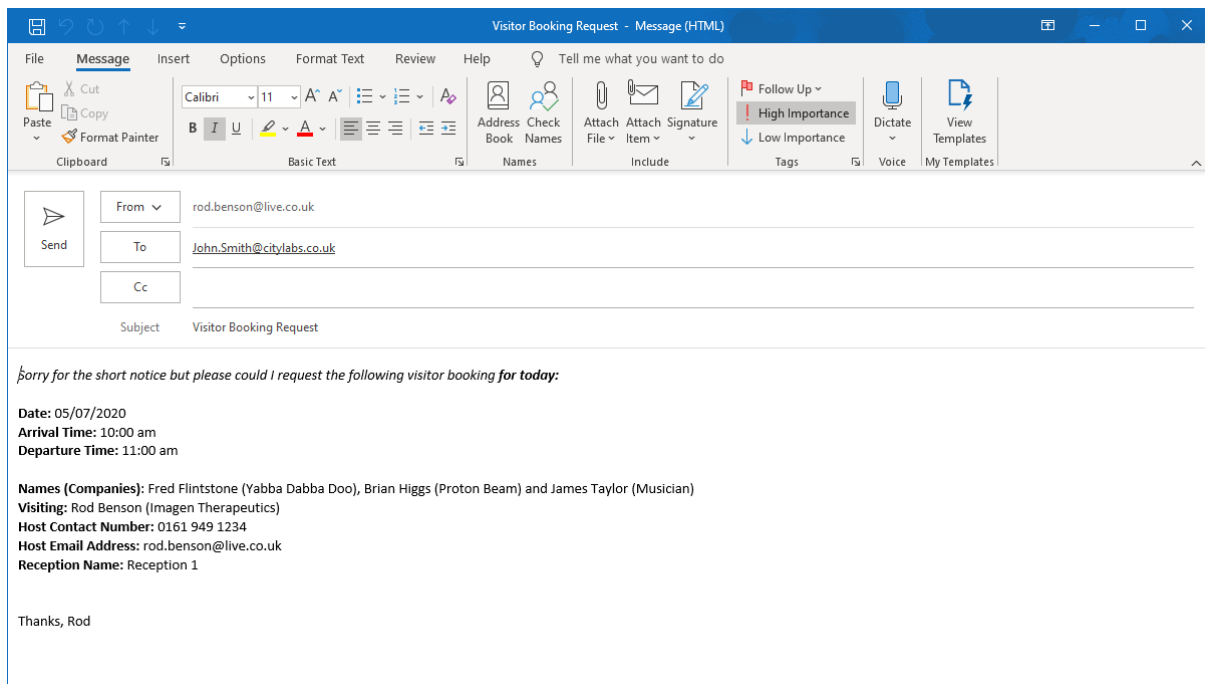
- Name: Fred Flinstone (dropdown menu)
- Company: Yabba Dabba Doo (text input)
- Email: Fred@Flinstone.com (text input)
- Date: 04/07/2020 (dropdown menu)
- Arrival Time: 10:00 am (time input)
- Departure Time: 11:00 am (time input)
- Buttons: "Change Hidden Info", "Cancel", "Add Another Visitor", "Create Emails"
- Checkboxes: ☒ "Create instruction email for visitor", ☒ "Add Appointment to Calendar"



We shall now add two new visitors. Fred Flintstone, from the company Yabba Dabba Doo, and James Taylor from the company Musician. Each time we want to add a new visitor we just push the “Add Another Visitor” button. Once we have entered our final visitor, we push the “Create Emails” button and the following emails are created. The visitor instruction email has all the email addresses of our visitors in the **To:** field and greets all three of visitors in a single salutation. Note the new background information about parking in the hospital carpark has now been placed into the email since we changed that using the “Change Hidden Information” button in the visitor entry menu.

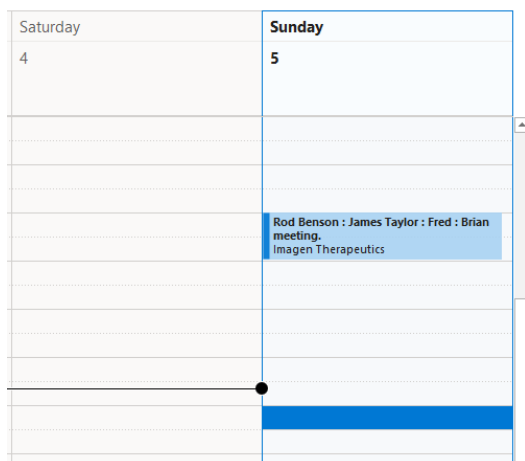


The second email produced is the one to go back to our front desk.



This email apologises to the front desk for the short notice you have given them about your visitors' imminent arrival plus it flags the email as urgent or high importance. The email also lists the full name of each visitor and the company to which they belong.

Finally, the appointment is added to the calendar of our default email account as shown:



Any new people details are also added back to the contact database of our default account (see Figure 10, page 12).

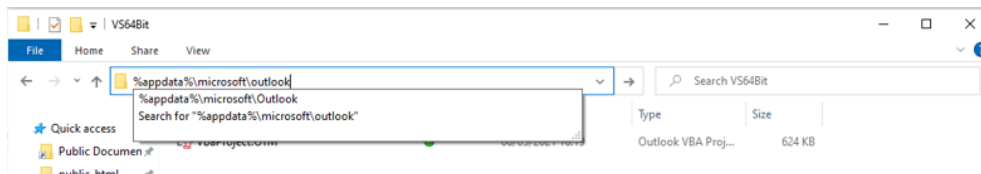
This completes the tutorial on the Outlook Visitor Management System. I hope you find this program useful in quickly managing your company visitor requirements.

### 3 Conclusion

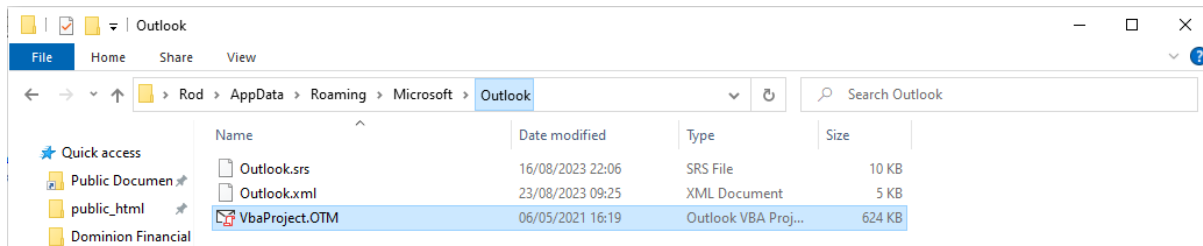
If you do find this program useful, please consider providing a [customer review](#). You might also like to check out my other programs which are also available on the website [here](#).

### 4 Troubleshooting Installation note

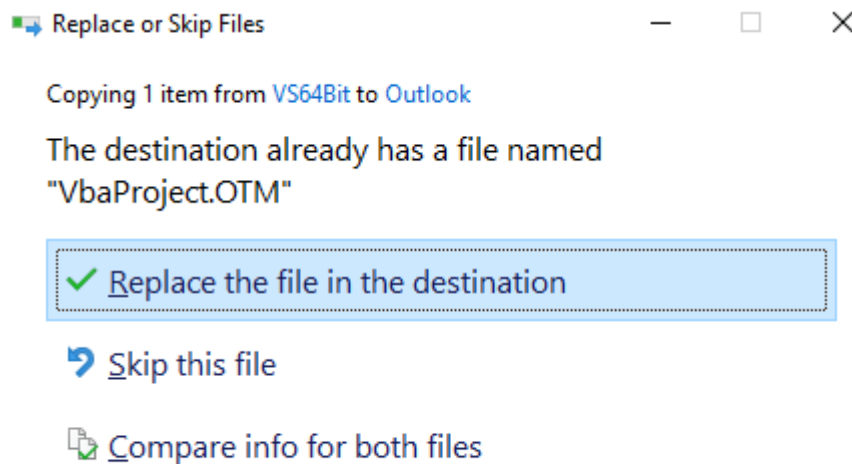
The install program automatically determines the bit architecture of Office by accessing this information from the program registry on your computer. However where this information is stored over the years has changed so I cannot guarantee that the install program is compatible with every version of Microsoft Office. If the install program cannot correctly identify the bit architecture of your Office and installs the wrong version of this program, then in the event you are running 64-bit Office and you try to run the 32-bit version of this program you will get a fatal error which says **Compile Error in Hidden Model**. If this should happen, close Outlook and go back to the original Visitor Entry folder in your downloads folder and open the subfolder VS64bit. In there you will see the single file VBaProject.OTM. While holding down the Ctrl key press C. Then in the path window at the top of the screen type the following: %appdata%\microsoft\outlook <Enter> (see next page).



This will take you to the Outlook macro folder:



Simply now hold down the Ctrl key and press and press V and you will get the standard warning about overwriting the file.



Click "Replace the file in the destination" and then once the new file has been copied restart your Outlook and all should be well.