Visitor Management Portal Setup Guide *with* Pikmykid

This guide is designed to help District Super Admin, District Personnel, Administrators and Front Office Staff gain a better understanding of the most frequently used features and settings in the Visitor Management portal.

Staff Login

Staff will login to their **unique location URL**. Staff members will receive an email to claim their account once their data has been added to the portal.

User Roles

Users are categorized into distinct roles for efficient management. Select specific roles from the **Users** dropdown menu to filter and view users belonging to a particular category, such as Super Admins, Visitors, etc. If you need to update a user's role, this can be done in the user's profile.

Campus Snapshot

Staff can personally configure their **Campus Snapshot** to conveniently display specific dashboards and information at all times using **Dashboard Widgets**.

- Click the **editing pencil** on the top right corner
- Select **Add Widget**
- **Choose a widget** from the library; **repeat** until all widgets have been added
- Widgets on the dashboard can be moved & resized based on preference
- Click **Stop** and **Save** when finished to save the view

Visitor information can be easily accessed from the Dashboard dropdown menu along the top of the homescreen.

The **Search** bar along the top of the homescreen simplifies the process of finding users, emails, data, and reports, providing a convenient & centralized search experience.
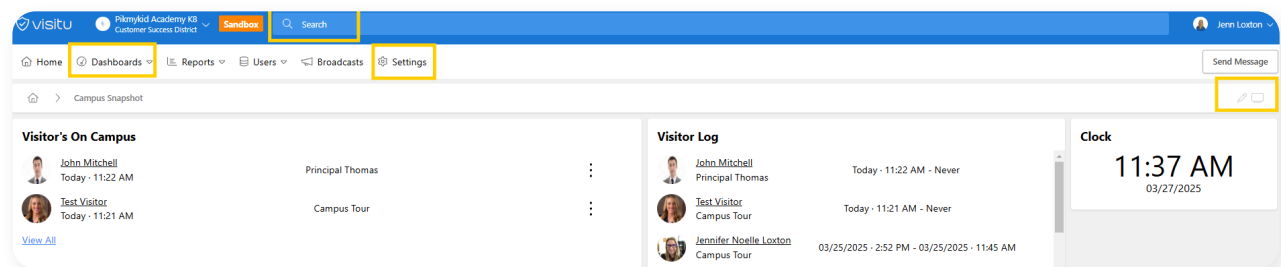
Settings

By default, many settings have been pre-configured based on initial feedback from Super Admin users.

Badges

Here you can preview your badge setup and if needed, make adjustments to the layout.

Check-In

Visitor check-in reasons are essential for tracking & managing visitor activities in your organization. By default, all visitors will be asked to choose a **Check-In Reason** or Host.
All staff members within the system are considered Hosts. Hosts will be notified by an email and push notification if they have the **Visitu Mobile App**.

Adding A New Reason

- Click the **New** button within the Custom Visitor Check-In Reasons panel
- Enter the new reason name in the provided field
  - *Optional* **Start/End Date**: Reason will only populate during this timeframe
  - *Optional* **Limit To Roles**: Identify which role(s) should see this particular reason when signing in
  - *Optional* **Who To Notify**: Determine a role or staff member who should be notified when a visitor signs in for that reason
- Click **Submit** to add the new check-in reason

Create Check-In Reason

Name

3rd Grade Assembly

Starts At | Expires On
03/31/2025 | 04/02/2025

Start Time | End Time
--:-- -- | --:-- --

Integration Type

Limit to roles

Visitor ✕

Who to notify

Jenn Loxton ✕

All users in the roles selected above will be notified.
Guardians of students will be notified by default.

Submit

*Please Note** that **deleting a check-in reason will remove all historical data** related to the check-in reason. If a check-in reason must be deleted, it is highly recommended to download a report with this information prior to deleting the check-in reason.

Devices

To connect your iPad(s) for Kiosk use, begin by downloading the **Visitu Kiosk App** to the iPad. Then click on **Enroll Devices** and scan the QR code using the Kiosk App on the iPad and follow the instructions.

Watch List

Add names for visitors who should be flagged when entering campus outside of your offender list. This could be used for VIPs like the Superintendent or Top Tier Donor but also for someone who should not be on campus for a particular reason.

To add a name to the Watch List, click **Add New** and add all known information. Notes can be added for staff to view and certain staff or roles can be notified when the visitor signs into campus.

If you check the **Require Verification** box, the visitor must be approved within the Dashboard in order to check-in and receive a badge.

Watch List
Add names for users who should be flagged when entering campus.

Name	Birthdate	Notes	Status	Who'll Be Notified	Added By	Actions
Oliver Warbucks	03/10/1950	Top Tier Donor	Notify	Super Admin, Principal Thomas	Jenn Loxton	✏ 🗑
Darth Vader	11/18/1977		Verify	Security, Front Desk Admin	Jenn Loxton	✏ 🗑
Johnny Norris	01/01/1983	no contact/custody issue	Verify	Security, Front Desk Admin, Super Admin	Jenn Loxton	✏ 🗑
Superintendent Wilson	02/05/1974		Notify	Principal Thomas	Jenn Loxton	✏ 🗑

Add New
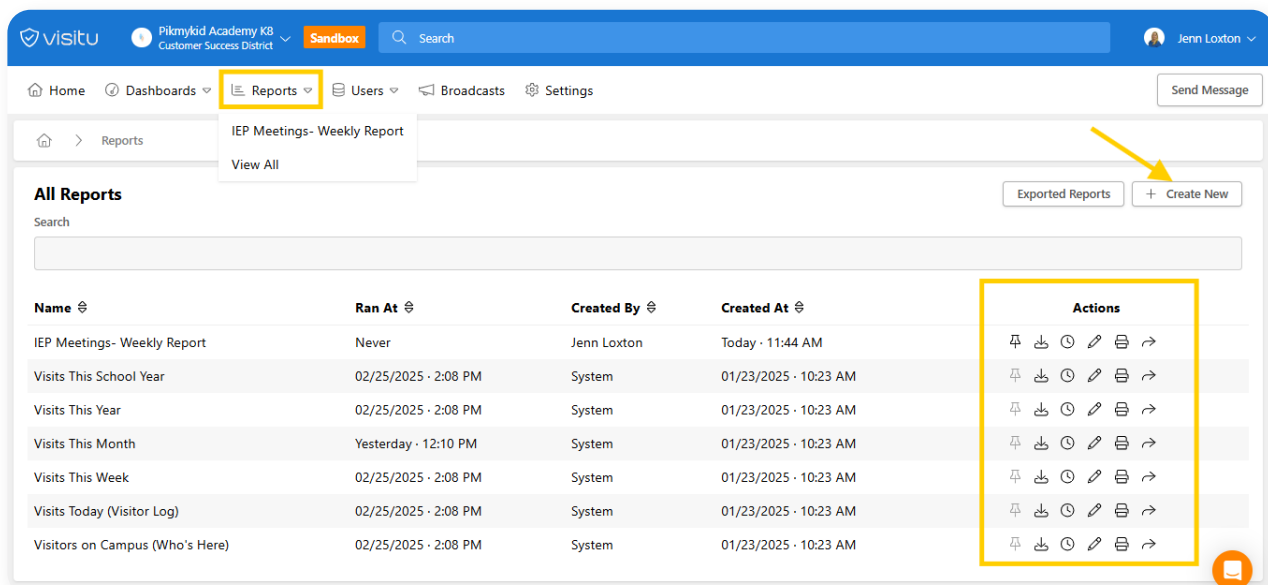
Reports

By default, standard reports are available and can be accessed by hovering over **Reports** and selecting **View All**.

Frequently used reports can be **pinned** for quick access from the Reports dropdown on the portal homepage. To save time, users can **schedule** reports to be sent via email to themselves or another staff member at a designated day and time.

From the Reports dashboard, users can also create **custom reports**.

- Click the **Create New** button in the top right-hand corner of the Reports page in the Dashboard
- Create a custom **Name** for the report
- Choose the **Report Type** from either the **Visits** or **Attendance** sub-categories
- Select a specified or custom **Date Range**
- You can also choose to add a filter for more specific information needed by clicking on **Add Filter**
- After choosing the filter type, specify further by choosing the role, the reason for visit, or host and click **Add**
- Cilck **Save** and you'll see a notification in the dashboard that the report has been saved
- You can then preview, download, schedule, or delete the report as needed

**Questions?** Email us at **success@pikmykid.com**.

Creating A Single Sign-On
with Visitu & Pikmykid

School users who need to access both the Visitu & Pikmykid portals can enable a single sign-on through the Visitu portal, allowing users to toggle between the two platforms as needed.

Getting Started

1. Log into the **Visitu Portal**.

2. Click on school name dropdown on top left of screen. Select **Validate Email Address**.
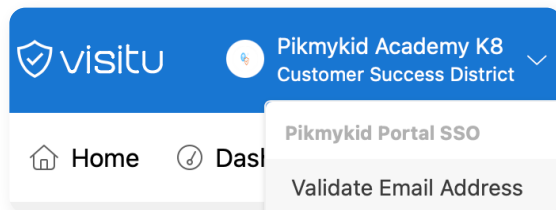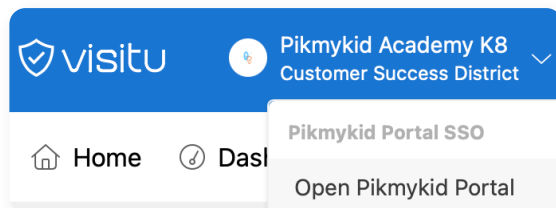

3. Confirm Email using the **Validation Code** (*will be sent to email associated with your Visitu Account*).

Confirm Email to Enable Pikmykid Sso

Validate your syoung@pikmykid.com email address in order to enable internal Single Sign On (SSO).

Email Validation Code *

4. Click on school name dropdown again & choose **Open Pikmykid Portal**.

5. To access **Visitu** from the Pikmykid Portal, select the **Visitu icon** on the bottom left.