



# Cloudbooking Visitor Management System: Visitors Quick Reference Guide

Internal Use Only

## Contents

1. [Adding a new visitor](#)
2. [Adding the date and site](#)
3. [Booking for another person](#)
4. [Adding the visitor arrival details](#)
5. [Adding the visit details](#)
6. [Editing a visit](#)
7. [Notification, Covid-19, and inductions e-mails](#)
8. [Covid-19 Health Screening](#)
9. [Where to get Help](#)

# Cloudbooking Visitor Management System

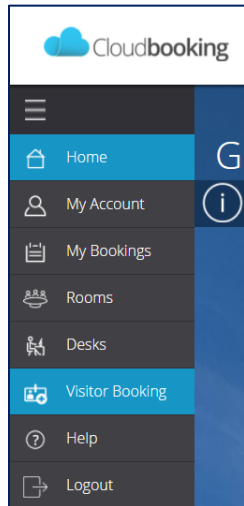


## Cloudbooking – Visitor Management System

**Note:** Not all sites have visitor management enabled. If you do not see "Visitor Booking" in the navigation bar then it is not enabled.

### 1) Adding a New Visitor

- Click on Visitor Booking to access the Visitor Management System.
- A pop-up form will appear:

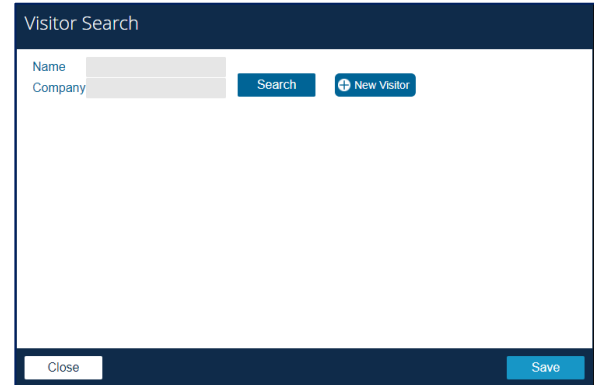


## Adding a new Visitor

- When a visitor is booked in to the office for the first time you will need to add their details to the system.
- This includes when colleagues are visiting other offices as AA and DB IDs are not pre-loaded in to the VMS
- If your visitor is not in the system, you will need to create a new Visitor ID. Anglo American IDs are not pre-loaded in the Visitor database.
- To start booking your visitor in click on the Visitor Question mark symbol
- Do this step first before making any other additions or changes



- A visitor search form will appear



A screenshot of the "Visitor Search" form. The form has a dark blue header with the title "Visitor Search". Below the header, there are two input fields: "Name" and "Company". To the right of the "Company" field is a blue "Search" button. To the right of the "Search" button is a blue button with a white plus sign and the text "New Visitor". At the bottom of the form, there are two buttons: a white "Close" button and a blue "Save" button.

# Cloudbooking Visitor Management System



## Adding a new Visitor

- When a visitor is booked into a location for the first time you will need to add their details to the system.
- Search to see if someone is already in the system.
- Use both fields in case two different people with the same name are in the system, or if they have changed companies.

Visitor Search

Name

Company

- If they are not in the system already a Search error will be generated – a new visitor ID will need adding.

Visitor Search

Name

Company

**Error:**  
Sorry, we couldn't find any results matching Name - John Doe, Company - Acme Corporation

- If found, click on the ID – you can skip the next page

Visitor Search

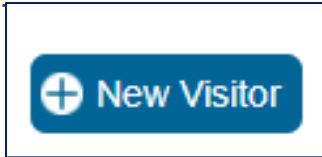
Name

Company

Mr Doe, John - john.doe@acme1corp.com (Acme Corporation)

## Adding a new Visitor

9. If they're not in the system, please click New Visitor then add their details in the pop-up form.



**New Visitor**

Title	Mr
Firstname*	John
Surname*	Doe
Company	Acme Corporation
Type	Visitor
Mobile	0800 123456
Email	john.doe@acme1corp.com

10. Change their Visitor 'Type' if needed.

**New Visitor**

Title	Mr
Firstname*	John
Surname*	Doe
Company	Acme Corporation
Type	Visitor
Mobile	Visitor
Email	Contractor
	Staff
	3rd Party Contractor

# Cloudbooking Visitor Management System



## Adding a new Visitor

11. Once saved they will be found in the database. Click the tick box next to their details, to add them to the Visitor invite.

The screenshot shows the "Visitor Search" interface. At the top, there is a search bar with "John Doe" entered. Below the search bar are two buttons: "Search" and "New Visitor". A search result is displayed below, showing a checkbox, a small profile icon, and the text "Mr Doe, John - john.doe@acme1corp.com (Acme Corporation)". At the bottom of the interface, there are two buttons: "Close" and "Save".

12.. Now you can start to add the time, date, and the details of the visit.

The screenshot shows the "New Visitor Booking" interface. At the top right, there is a "Site" label with a location pin icon. The main form contains several fields: "Visitor" with a search icon and "Mr John Doe"; "Due" with a date picker set to "08 Apr 2021" and a time dropdown set to "11:15"; "Multi-day Visit" with an unchecked checkbox; "Site" with a dropdown menu set to "London - CHS"; "Room Booking" with a search icon; "Host\*" with a dropdown menu set to "Anglo American Training" and a search icon; "Notification Method" with a dropdown menu set to "Tel Call"; "Alternative Host" with an empty text field; "Reason for Visit\*" with an empty text field; and "Notes" with a large empty text area. At the bottom right, there is a checkbox labeled "Copy details to next visitor booking". At the bottom of the interface, there are two buttons: "Close" and "Save".

# Cloudbooking Visitor Management System



## 2) Adding the Date and Site

1. Next edit the Date and Time

The screenshot shows the 'New Visitor Booking' form with the following fields and values:

- Visitor: Mr John Doe
- Due: 9 Apr 2021
- Multi-day Visit:
- Site: London - CHS
- Room Booking:
- Host\*: Anglo American Training
- Notification Method: Tel Call
- Alternative Host:
- Reason for Visit\*:
- Notes:

The 'Time' dropdown menu is open, showing a list of times from 09:15 to 14:00. The '14:00' option is highlighted. At the bottom of the form, there are 'Close' and 'Save' buttons.

2. If needed, change the **Site** location.

The screenshot shows the 'New Visitor Booking' form with the following fields and values:

- Visitor: Mr John Doe
- Due: 1 Apr 2021
- Site: Brisbane Corporate Office
- Host\*: 144 Oxford
- Notification Method: 44 Main Street
- Alternative Host: 45 Main Street
- Reason For Visit\*: 55 Marshall Street
- Notes: Anglo American Centre for Experiential Learning
- Host Agreement: Belo Horizonte

The 'Site' dropdown menu is open, showing a list of sites including Brisbane Corporate Office, Coal SA, De Beers West Campus - Ignite (SA Ops) and Exploration, London - CHS, London - CHT, Santiago, Singapore, and Vancouver. At the bottom of the form, there are 'Close' and 'Save' buttons.



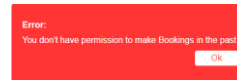
## Adding the Visit Details

- If you book across multiple locations you will see that there are variances in the form fields or features that you have access to. These are localised differences and are in line with the way we operate in-country.
- Differences in features vary depending on what is available in some locations versus others e.g. Parking is available at 44 Main Street but there is no bookable Parking at CHS.

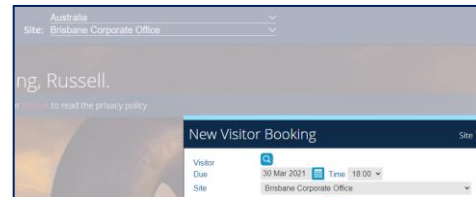
Site	44 Main Street
Room Booking	<input type="checkbox"/>
Host*	Russell Pearson <input type="checkbox"/>
Notification Method	Email
Alternative Host	<input type="text"/>
Vehicle Reg*	<input type="text"/>
Reason For Visit*	<input type="text"/>

## Quick Tips

All visits should be booked at least **24 hours** in advance



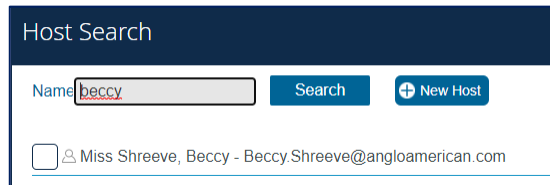
The default **Site** location will follow your global Account settings (please see the Quick Start Guide on 'Accounts and Settings').



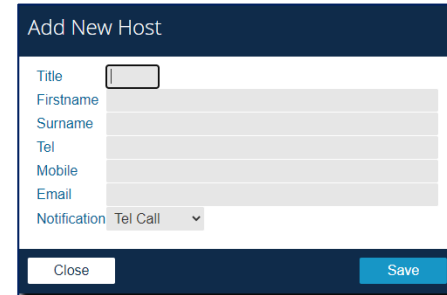
The screenshot shows the 'New Visitor Booking' form. At the top, there are dropdown menus for 'Australia' and 'Brisbane Corporate Office'. Below this, there is a search bar with the text 'ng, Russell.' and a link to 'read the privacy policy'. The main form area has a title 'New Visitor Booking' and a 'Site' dropdown. The form fields are: 'Visitor' (with a plus icon), 'Date' (30 Mar 2021), 'Time' (18:00), and 'Site' (Brisbane Corporate Office).

## 3) Booking for another person

- If you are booking a visitor on behalf of someone else, be sure to change the host details - you can do this by clicking the question mark next to the host name



- If they are not an Anglo American employee, you will need to create a new host in the system.



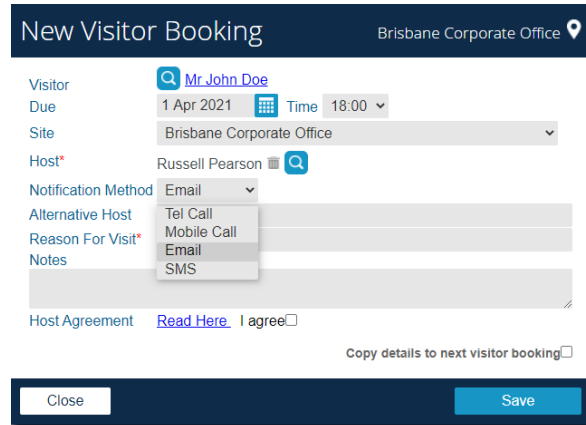
## 4) Adding the Visitor Arrivals details

- When your visitor arrives, reception will need to notify you of their arrival.
- Select the preferred notification method.
- Please make sure you have added your mobile / phone number in your account settings.

- If required, please add an alternate host
- Please note, this person will not be notified of arrivals

Alternative Host

Beccy Shreeves



The screenshot shows the 'New Visitor Booking' form for the 'Brisbane Corporate Office'. The form includes the following fields and options:

- Visitor:** Mr. John Doe
- Due:** 1 Apr 2021, Time: 18:00
- Site:** Brisbane Corporate Office
- Host\*:** Russell Pearson
- Notification Method:** Email
- Alternative Host:** Tel Call
- Reason For Visit\*:** Mobile Call
- Notes:** Email, SMS
- Host Agreement:** [Read Here](#) | agree
- Copy details to next visitor booking:**

Buttons at the bottom: Close, Save

# Cloudbooking Visitor Management System



## 5) Adding the Visit Details

- Add the reasons for the visit – this is a compulsory field, and any notes about the visitor (optional field)

Reason For Visit*	To test the booking system
Notes	This is for training purposes

- If you need to book multiple visits for the same visitor, you can copy their booking details to the next visit.

Copy details to next visitor booking <input type="checkbox"/>	
Close	Save

- For some offices such as Brisbane Corporate Office, you need to accept the Host agreement to book the visit

<p><b>Host Agreement</b></p> <p>As the visitor's host, it is your responsibility to meet your visitor at the Reception area and to escort them at all times whilst on site. It is your responsibility to ensure that your visitor only has access to the areas to which they have been approved. You must also ensure that your visitor abides by all applicable regulations at all times whilst on site. This includes, but is not limited to:</p> <ul style="list-style-type: none"><li>• No Photography On-Site</li><li>• No Use of Removable Media on site</li><li>• Remain upon designated walkways, unless appropriate PPE, trade control approval, and training has been given</li><li>• No Access to Secure or Classified Areas without an Appropriate Pass.</li></ul> <p>As a contractor's host, it is your responsibility to ensure that the contractor you're bringing on to site has received the Contractors Health, Safety and Environmental Handbook and to ensure they comply with its requirements.</p> <p>Any infringement of company policies may result in your visitor being removed from site and you may be subject to disciplinary action.</p> <p>At the end of the visit, it is your responsibility to escort your visitor from the site and to ensure that their Visitor ID badge is returned to the Visitor Reception or the Security Office.</p> <p>OK</p>
--

Host Agreement <a href="#">Read Here</a>   <input type="checkbox"/> I agree
---

- Please don't forget to click Save when finished.

# Cloudbooking Visitor Management System



## Adding the Visit Details

- Select Multi-day visit for longer visits
- Add the days in the calendar and click Save

**New Visitor Booking** Site

Visitor:

Due: 19 Apr 2021 Time 12:00

Multi-day Visit:  Valid Until 23 Apr 2021

Site: London - CHS

Room Booking:

Host\*: Anglo American Training

Notification Method: Tel Call

Alternative Host:

Reason for Visit\*:

Notes:

Copy details to next visitor booking

Close Save

**New Visitor Booking** Site

Visitor:

Due: 19 Apr 2021 Time 12:15

Multi-day Visit:  Valid Until 22 Apr 2021

Site: London - CHS

Room Booking:

Host\*: Anglo American Training

Notification Method: Tel Call

Alternative Host:

Reason for Visit\*:

Notes:

Copy details to next visitor booking

Close Save

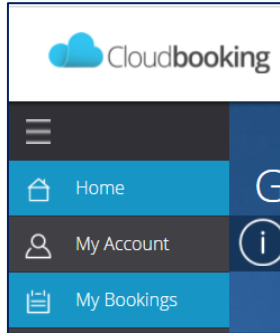
April, 2021						
Mo	Tu	We	Th	Fr	Sa	Su
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2

# Cloudbooking Visitor Management System



## 6) Editing a Visit

- Save Visits can be edited via **My Bookings**.
- Select the Visit you wish to enter by clicking on the list item



Booking ID	Recurring	Service	Status	Created Date	Created By	On Behalf Of	Description	Start	End	Site	Detail	Cancelled	Private
00426965	<input type="checkbox"/>	Visitor	Due	30 Mar 2021 18:43	russell.pearson@angloamerican.com		John Doe (Acme Corporation)	02 Apr 2021 09:30	30 Apr 2021	Brisbane Corporate Office	Host: Mrs Natasha Van Der Ween	<input type="checkbox"/>	<input type="checkbox"/>
00426966	<input type="checkbox"/>	Visitor	Due	30 Mar 2021 18:48	russell.pearson@angloamerican.com		John Doe (Acme Corporation)	02 Apr 2021 09:45	02 Apr 2021	Brisbane Corporate Office	Host: Mr Russell Pearson	<input type="checkbox"/>	<input type="checkbox"/>
00426970	<input type="checkbox"/>	Visitor	Due	30 Mar 2021 19:20	russell.pearson@angloamerican.com		Russell Pearson (AngloAmerican)	30 Apr 2021 10:30	30 Apr 2021	Brisbane Corporate Office	Host: Miss Beccy Shreeve	<input type="checkbox"/>	<input type="checkbox"/>

### Edit Visitor Booking

Booking ID: 00431351 Status: Due

Visitor: [Mr John Doe](#)

Due: 16 Apr 2021 Time: 10:45

Multi-day Visit:

Site: London - CHS

Room Booking:

Host\*: Mr Anglo American Training

Notification Method: Tel Call

Alternative Host:

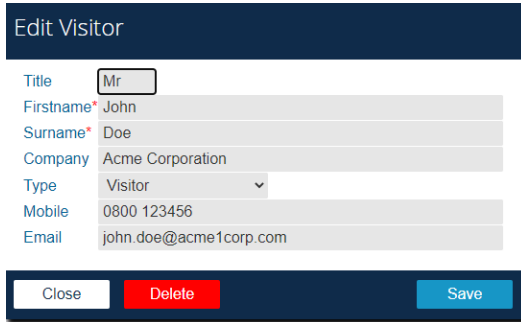
Reason for Visit\*: testing purposes

Notes: Test

Close Delete Save

## Editing a Visit

- Click on the Visitor name to change or alter their details.



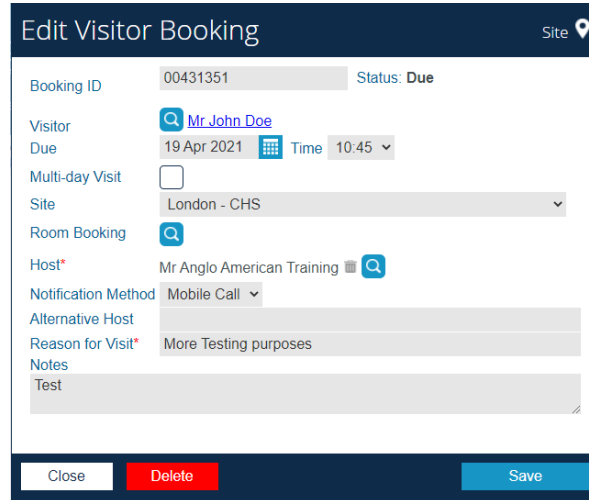
The 'Edit Visitor' form contains the following fields:

- Title: Mr
- Firstname\*: John
- Surname\*: Doe
- Company: Acme Corporation
- Type: Visitor (dropdown)
- Mobile: 0800 123456
- Email: john.doe@acme1corp.com

Buttons at the bottom: Close, Delete, Save.

- Then press Save when complete.
- If you wish to delete that Visitor's booking, select Delete.

- You can change all other visit details in the relevant fields. Press Save when complete.



The 'Edit Visitor Booking' form contains the following fields:

- Booking ID: 00431351 (Status: Due)
- Visitor: Mr John Doe
- Due: 19 Apr 2021 (Time: 10:45)
- Multi-day Visit:
- Site: London - CHS (dropdown)
- Room Booking: [Search icon]
- Host\*: Mr Anglo American Training [Search icon]
- Notification Method: Mobile Call (dropdown)
- Alternative Host: [Text field]
- Reason for Visit\*: More Testing purposes
- Notes: Test

Buttons at the bottom: Close, Delete, Save.

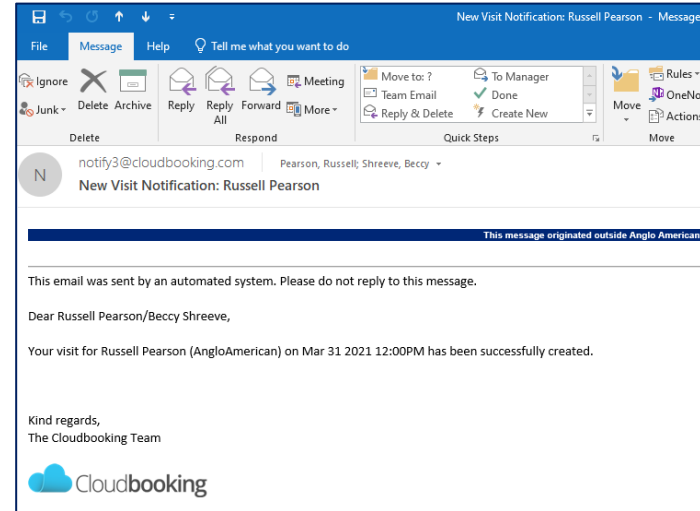
- If you wish to delete the **whole** booking, select Delete.

# Cloudbooking Visitor Management System



## 7) Notification, Covid-19, and inductions e-mails

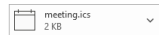
- When a booking is made a **series of e-mails are automatically sent to the Host and Visitor**. It's **important that the Visitor responds to these e-mails and supplies relevant Covid-19 details ahead of the visit**.
- **Failure to respond will mean that the visitor will not be allowed to visit.**
- **The Covid-19 information e-mail is sent on the day of the visit.**
- The Host will receive a **confirmation e-mail** of the booking. (In this example the host and Visitor are the same person).





## Notification, Covid-19, and inductions e-mails

- The **Visitor** will receive a **confirmation e-mail** of the booking with diary details for saving to their Calendar.



Date : 16/04/2021 11:00

**Location:**

17 Charterhouse Street  
London  
United Kingdom

**Switchboard:** Anglo American - 020 7968 8888 or De Beers - 020 7

**Host Name:** Anglo American Training

**Host Email:**

**Important Information**

Before your visit please review the site induction information. This can be found at <https://vms.cloudbooking.com/induction/caff40dd-fb8d-4ab0-972c-526b450e8fa2>. You will be

- The content of the e-mail may differ slightly depending on the location

- The e-mail contains a link to an **induction website**

### Important Information

Before your visit please review the site induction information. This can be found at <https://vms.cloudbooking.com/induction/caff40dd-fb8d-4ab0-972c-526b450e8fa2>. You will be

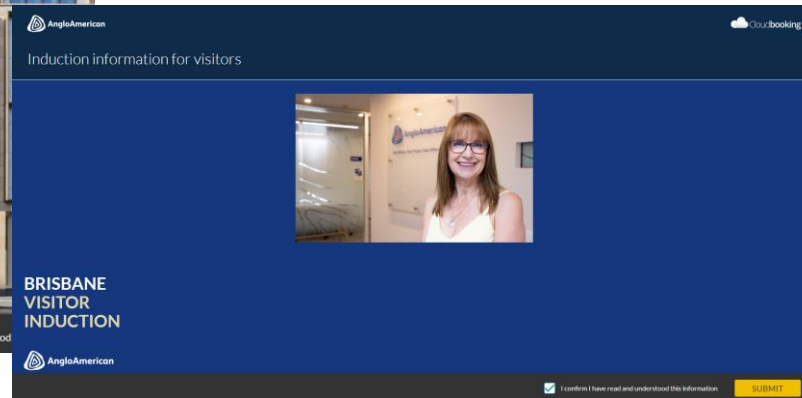
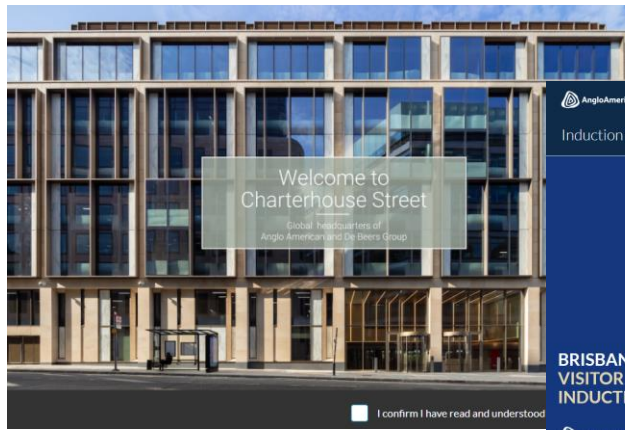
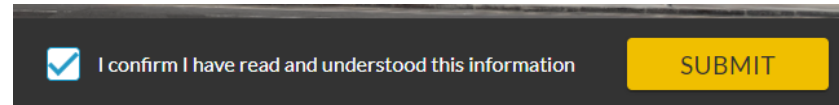
**Note:** The link to induction website link will not be sent for multiple bookings made on the same day.

# Cloudbooking Visitor Management System



## Notification, Covid-19, and inductions e-mails

- A link to the **Induction Site** is in the confirmation e-mail
- The induction includes information about the Covid-19 critical controls that are in place in that location and that must be adhered at all times to when on site
- The **Visitor must confirm they have read and understood** the site information

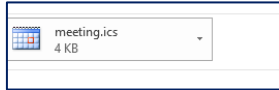


# Cloudbooking Visitor Management System



## Notification, Covid-19, and inductions e-mails

- The notification e-mail contains a **calendar invite**



Subject: Anglo American

Location: [Empty field]

Start time: Wed 31/03/2021 03:00  All day event

End time: Wed 31/03/2021 03:00

Title: A flying visit

Date From/To: 31 Mar 2021 12:00 - 12:00  
TimeZone: E. Australia Standard Time

Location: Brisbane Corporate Office -

Visitor Parking Info:

Visitor Directions:  
Upon arrival at 201 Charlotte Street, proceed through the ground level to the lifts, ensuring you follow all the relevant signage. Anglo American Metallurgical Coal main reception is located on level

Arrival Instructions:  
Upon arrival at 201 Charlotte Street, proceed through the ground level foyer to the lifts, ensuring you follow all relevant signage. Anglo American Metallurgical Coal main reception is located on Le

Additional info:  
All visitors to Anglo American Brisbane Corporate Office will be screened for COVID-19.

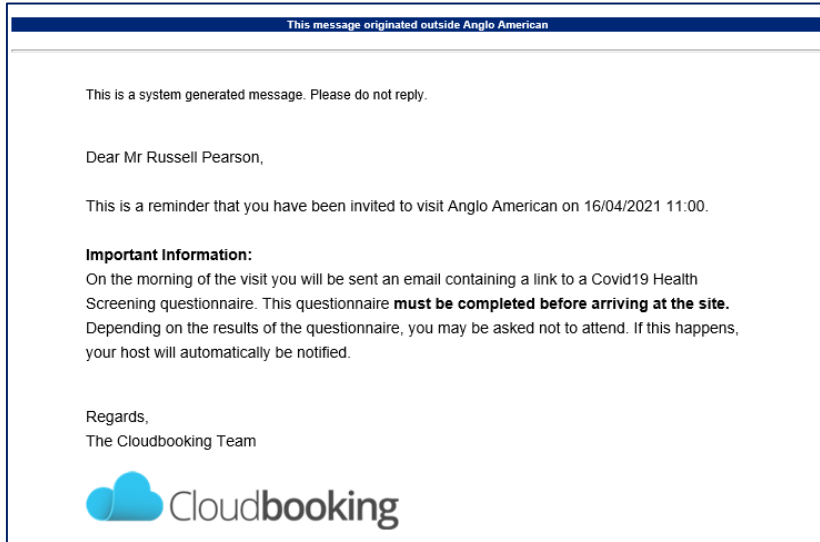
Address:  
Brisbane Corporate Office  
11/201 Charlotte Street  
Queensland  
Brisbane City  
Australia  
4000

### Quick Tip:

- when booking from one Time Zone to another, Outlook will display the times locally. This visit is for 1200 noon Brisbane time, but Outlook displays it as the local machine time - 0300 UK time.
- If in doubt, check with the visitor in the local Time Zone to make sure the right time has been booked.

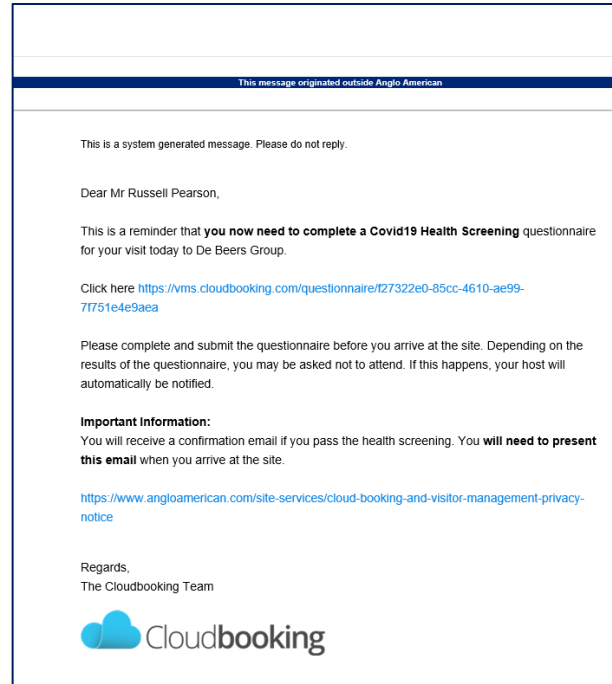
## Notification, Covid-19, and inductions e-mails

- The Visitor will receive a **reminder e-mail** on the day before their visit



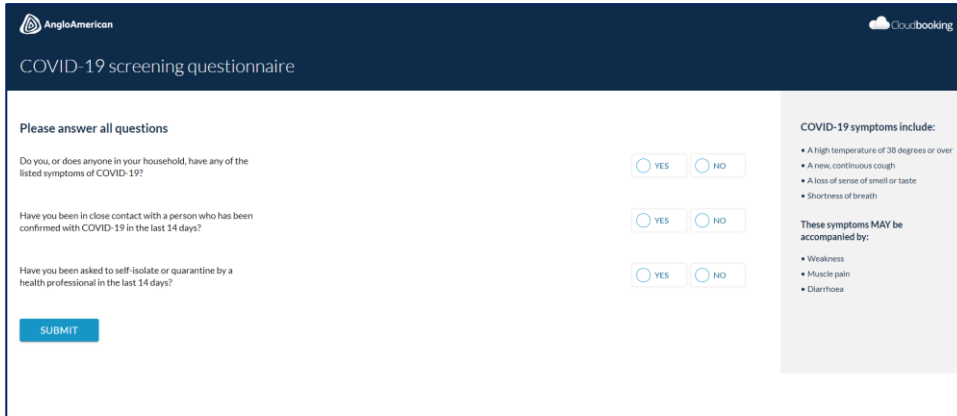
## 9) Covid-19 Health Screening

- The Visitor will receive a **health screening e-mail on the morning of their visit.**
- **This e-mail needs to be presented when they arrive on site.**
- The e-mail contains a **link to Covid-19 health screening questions.**



## Covid-19 Health Screening

- Visitor's **Covid-19 Screening questions**



The screenshot shows a web interface for a COVID-19 screening questionnaire. At the top left is the 'AngloAmerican' logo and at the top right is the 'Cloudbooking' logo. The title of the form is 'COVID-19 screening questionnaire'. Below the title, it says 'Please answer all questions'. There are three questions, each with 'YES' and 'NO' radio button options:

- Do you, or does anyone in your household, have any of the listed symptoms of COVID-19?
- Have you been in close contact with a person who has been confirmed with COVID-19 in the last 14 days?
- Have you been asked to self-isolate or quarantine by a health professional in the last 14 days?

At the bottom left is a blue 'SUBMIT' button. On the right side of the form, there is a grey box containing information about COVID-19 symptoms and accompaniment:

**COVID-19 symptoms include:**

- A high temperature of 38 degrees or over
- A new, continuous cough
- A loss of sense of smell or taste
- Shortness of breath

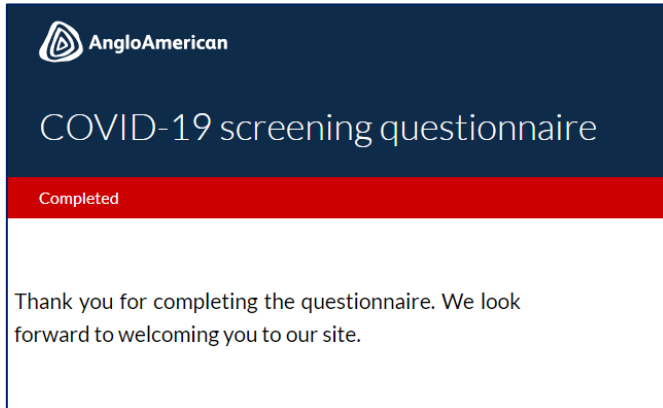
**These symptoms MAY be accompanied by:**

- Weakness
- Muscle pain
- Diarrhoea

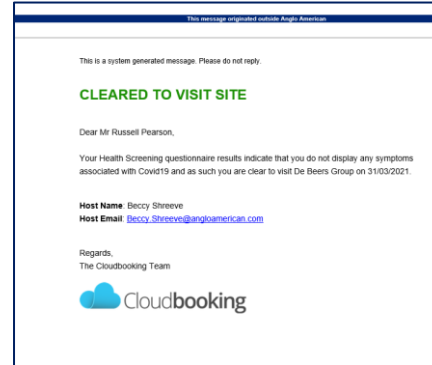
- **This must be completed on the day of the visit, or the Visitor will be denied access**

## Covid-19 Health Screening

Visitor **successful Covid-19 clearance** website message



- Visitor receives a **Covid-19 clearance notification e-mail**



- **Note** – The Host only receives a notification e-mail if the Covid-19 clearance fails

## Covid-19 Health Screening - Covid-19 Denied Access

- The Visitor **fails** the Covid-19 clearance
- Host receives e-mail notification - **unsuccessful Covid-19 clearance**

### YOUR VISITOR HAS BEEN DENIED ACCESS

Dear Russell Pearson,

Your Visitor Booking for on 01/04/2021 17:00 has been cancelled due to a failed Covid19 Health Screening.

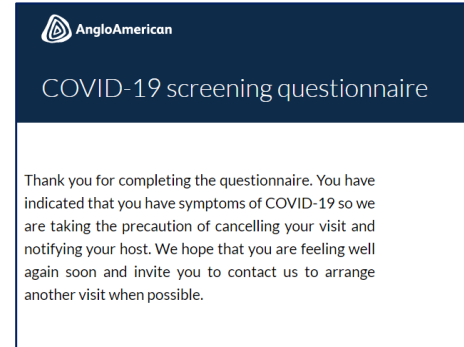
If you need to re-schedule the visit you will need to create a new visitor booking no sooner than 24 hours after receipt of this email.

Regards,  
The Cloudbooking Team

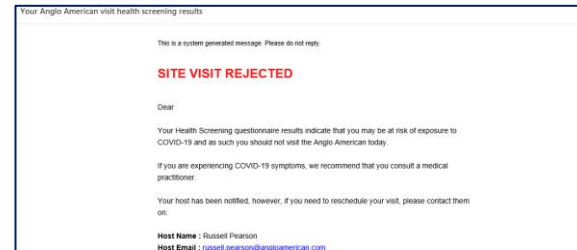


- The Host will need to **arrange a new visit** when the *Visitor has fully recovered from Covid-19*

- The Visitor is notified in the Covid-19 screening website - **unsuccessful Covid-19 clearance**



- The Visitor receives an e-mail notification - **unsuccessful Covid-19 clearance**





## Cloudbooking Help

- If you have any issues or problems with Cloudbooking, please contact your local GSD or OT Service Desk

OT Service Desk	<a href="mailto:ot.servicedesk@angloamerican.com">ot.servicedesk@angloamerican.com</a>
CHS - Anglo American	<a href="mailto:chsservicedesk@angloamerican.com">chsservicedesk@angloamerican.com</a>
CHS - De Beers	<a href="mailto:chsservicedesk@debeersgroup.com">chsservicedesk@debeersgroup.com</a>
Global HCL Service Desk	<a href="mailto:aa.servicedesk.global@angloamerican.com">aa.servicedesk.global@angloamerican.com</a>
Brazil HCL Service Desk	<a href="mailto:aa.servicedesk.portuguese@angloamerican.com">aa.servicedesk.portuguese@angloamerican.com</a>
Chile HCL Service Desk	<a href="mailto:aa.servicedesk.spanish@angloamerican.com">aa.servicedesk.spanish@angloamerican.com</a>

- For more information about how to use the Cloudbooking, Help, and additional Support Materials please [visit Eureka!](#)