UWA VMS

Visitor Management System
User Guide

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What is the UWA VMS?

The **UWA Visitor Management System** allows visitors to quickly and easily sign in and out of several research sites associated with UWA, such as the Gingin Gravity Precinct, IOMRC Crawley, IOMRC Waterman's Bay, and Ridgefield Farm.

The purpose of the VMS is to ensure the site administrator(s) know who is on site, and for how long. Ultimately, this provides:

> **Emergency Contact:** Anyone who is currently checked in to a site can be identified and contacted in the event of an emergency. Additionally, overnight visitors can provide their emergency next-of-kin contact information.
> **Analytics:** Visitors provide information about who they are, allowing site administrators to understand how their site is being used.
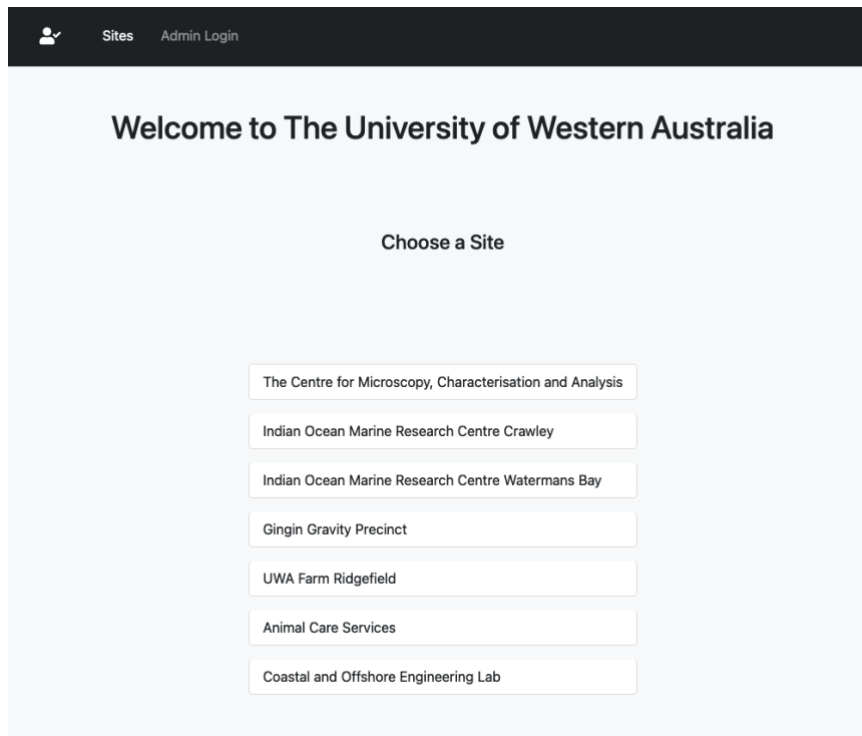> **Security:** In the event of a security breach, visitors who were on site during that time can be contacted.

The following user guide will walk through the setup and use of the Visitor Management System.

Initial Setup

On-Site Setup

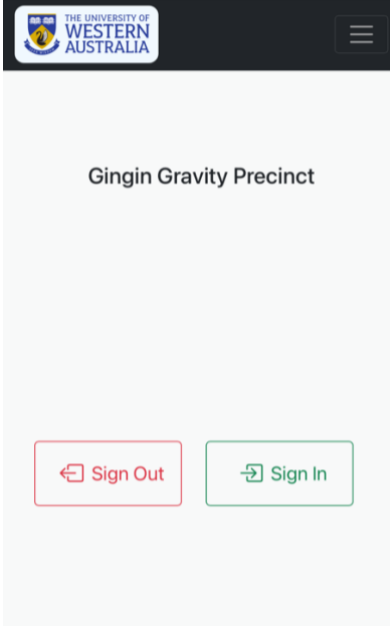The home page of the VMS presents a list of sites currently available for check in:

The system was intended to be set up on-site in one of two ways:

1. **QR Code:** Visitors can access the VMS via their smartphone, using a QR code that you produce, and then put in prominent places at the entrance. Set up a QR code by navigating to your site from the homepage and using the URL to generate a QR code (using a free tool such as QRCodeMonkey). This code can then be printed and pasted at the entrance.
2. **Tablet:** Visitors can access the VMS on a tablet, opened to the relevant check-in page, and placed at the entrance.
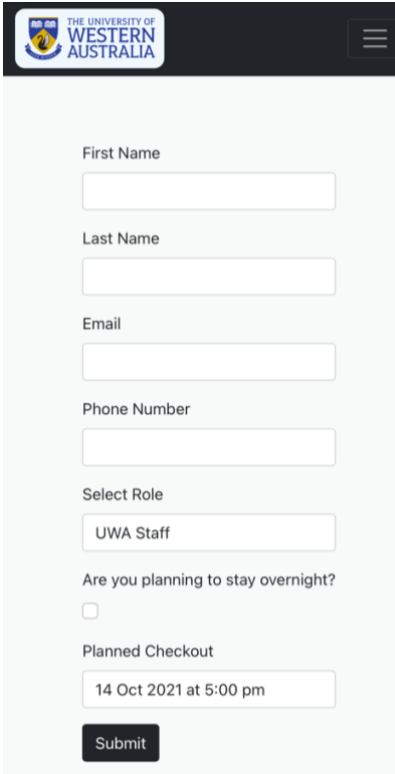
Check-in and Check-out
At each site, users are presented with a screen featuring two buttons:
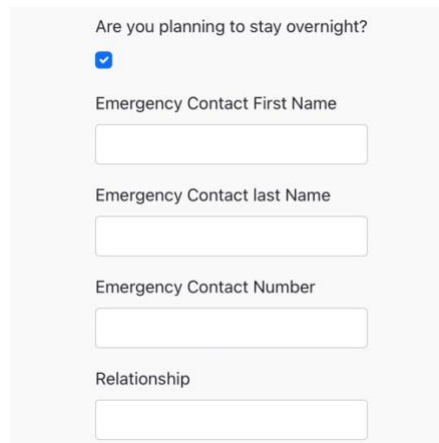
Checking In
When signing in, users are required to enter their details:

Additionally, when opting for an overnight stay (at eligible locations), they will be required to enter the details of an emergency contact:

Are you planning to stay overnight?
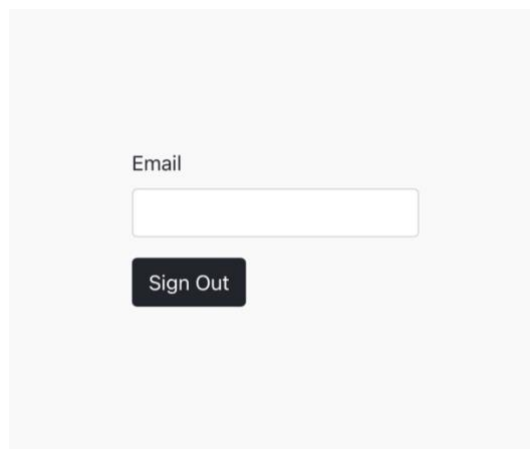
☑

Emergency Contact First Name

Emergency Contact last Name

Emergency Contact Number

Relationship

Checking out

When checking out, users will simply be required to re-enter their email. A visitor's email acts as their primary identifier; future use of the same email address will be used to record a history of their visits (for more information, see the *histories* section under *administrator functions*).
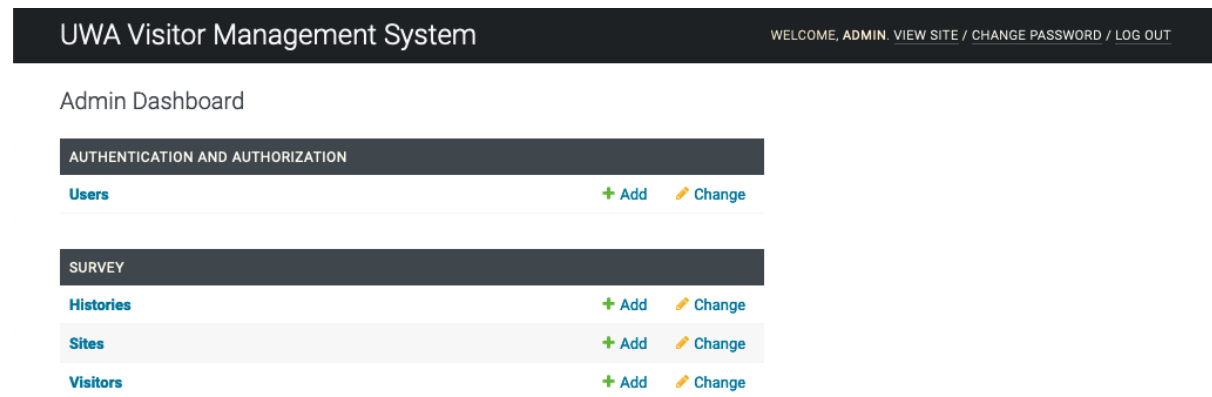
Email

Sign Out

Administrator Functions

The administrator section contains several key functions, covered below.

Dashboard

When an admin first logs in, they see the dashboard.

Histories displays a history of all visitors across all sites. This section only displays historical check-ins; it does **not** display the current visitors of a site (that information is found in *visitors*, below).

Sites displays all the sites currently available and allows the administrator to add new sites or remove old ones that no longer require the VMS.

Visitors displays all known visitors and presents key information such as their last check-in time, which site they most recently visited, whether they have checked out yet, emergency contact details, and so on.

Rule of Thumb: if you are searching for the current visitors at a given site, use **visitors**. If you are searching for historical data - i.e., which visitors previously visited a site - use **histories**.

Users allows an administrator to manage other administrator accounts, including adding and deleting users (depending on their permissions). Further information on this section can be found in the *Managing Administrator Accounts* section.

Visitors: Finding Current Visitor Information

Upon selecting the visitors page, you will be presented with a list of key information for each visitor:

This screen presents important information on each visitor - in particular the site they are visiting, their contact details and their check-in time. Let's look at the first line by way of example.

As we can see, this user - Bernie Sanders - is visiting the Gingin Gravity Precinct. He checked in at 12:12pm on October 7th, and plans to checkout at 4pm later that day. He has not checked out yet, and he is not staying overnight.

After Bernie has checked out, his entry will look like this:

Note that the only change is there is a green tick in the 'checkout' field, meaning he has checked out. If we want to see information about his stay, we will need to check **Histories**.

Note: If a user with the same email address enters a different phone number from their last check-in, their new phone number will overwrite the old one. The same is true for their first name, last name, and role. **Visitors are identified primarily by their email address**.

Using Filters

We may want to only see visitor information from a certain site - for example, if there is an emergency at a site - or we might want to see the details of only contractors that checked in to a site. The *Filters* tab, found in both **Visitors** and **Histories**, provides several options for filtering our search.
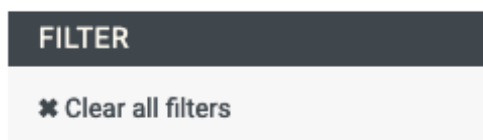
To filter by site (in the below example, we are selecting only visitors at the *Ridgefield Farm*):
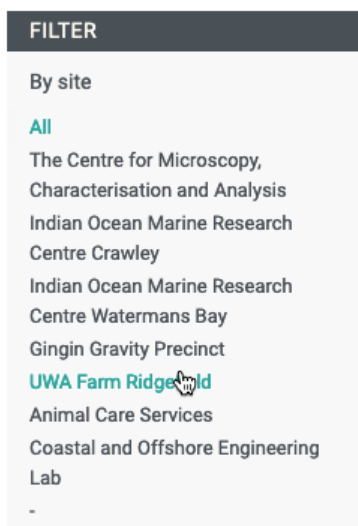
To filter by role (below we are searching for only *contractors*):
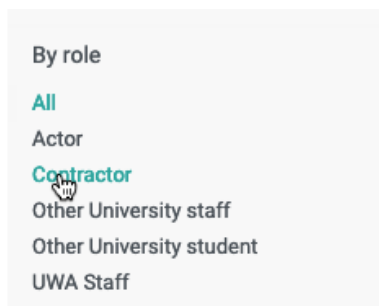
Filters can be combined; for example, you can search for only contractors, at the Ridgefield Farm, in the part 7 days. To clear your filters, select *'clear all filters'*:

Find all current visitors at a site
To find out who is currently at a site, you must ensure two filters are used.

Select the site:

And then in '*by checkout*' select *'no'*:

This ensure you are only viewing visitors who are currently at the site.

Histories: Finding Historical Visitor Information
The **Histories** section is where we can see historical information about the visitors of each site.
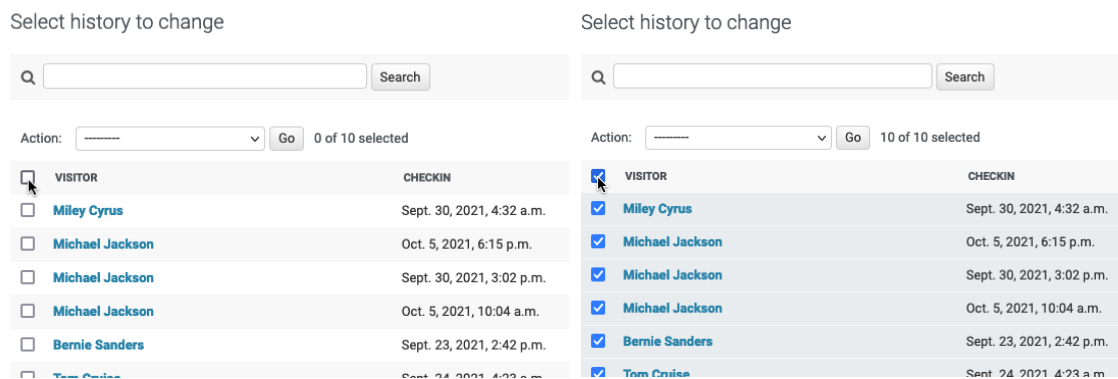
From this page, you can see the check-in and check-out time of each visitor.

Downloading Historical Data

To output a .csv file of this data, first select the parameters for your output by choosing the correct filters (see *'using filters',* above, for a full explanation). For example, we might choose to only output check-ins from the past year:
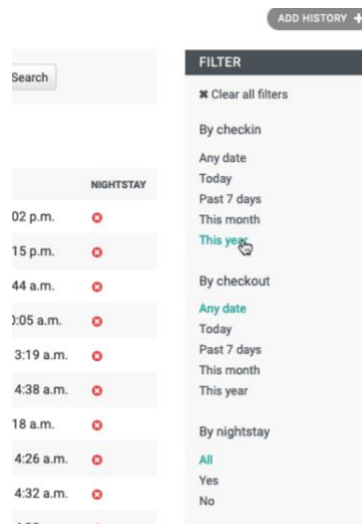
Then, ensure all histories have been selected by clicking the topmost checkbox:

Then, in the *action* section, select 'Export Selected', and click 'Go':

Sites

The *Sites* section is where you will find a list of the currently available sites, and whether they have overnight accommodation:

Add a site

To add a site, simply select *'add site'*:

Enter the site name and check the box if it has accommodation (thus allowing users to enter emergency contact info). Then, click *'SAVE'*. The site will be added to the homepage, and is now ready to accept visitor check-in and check-out.

Remove a site

To remove a site, simply select it from the **sites** section:

And select *'Delete selected sites'* from the *'actions'* drop-down, then click *'Go'*.

Managing Administrator Accounts

As a superuser, you are able to manage other admin accounts. To do this, select **Users** from the dashboard:

You will see a list of administrator accounts:

Adding a new administrator
To add a new admin, select *'add user'*:

Add details as required:

Set permissions (for more, see the *Managing Permissions* section below):

Ensure that 'Staff Status' is checked (otherwise many features will be locked):

Finally, set a username and password, and click *'SAVE'*. These details will be required when the new admin needs to access the admin dashboard.

Managing Permissions
Selecting *superuser* grants an administrator all permissions, including the ability to add and delete new administrators. It is recommended to only allow one or two superusers.

To give an admin most permissions, without the ability to add and delete admin accounts, you can set permissions as follows:

This can be achieved by selecting 'choose all' under *available user permissions*, and then sending back the four permissions that begin with *'auth | user'*.

Users of this kind will still be able to view visitor data, download historical data, and add and delete visitors.

Changing your Password
As an administrator, you can change your password by selecting '*CHANGE PASSWORD'* from the top of the admin dashboard:

Follow the prompts to change your password.