

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.

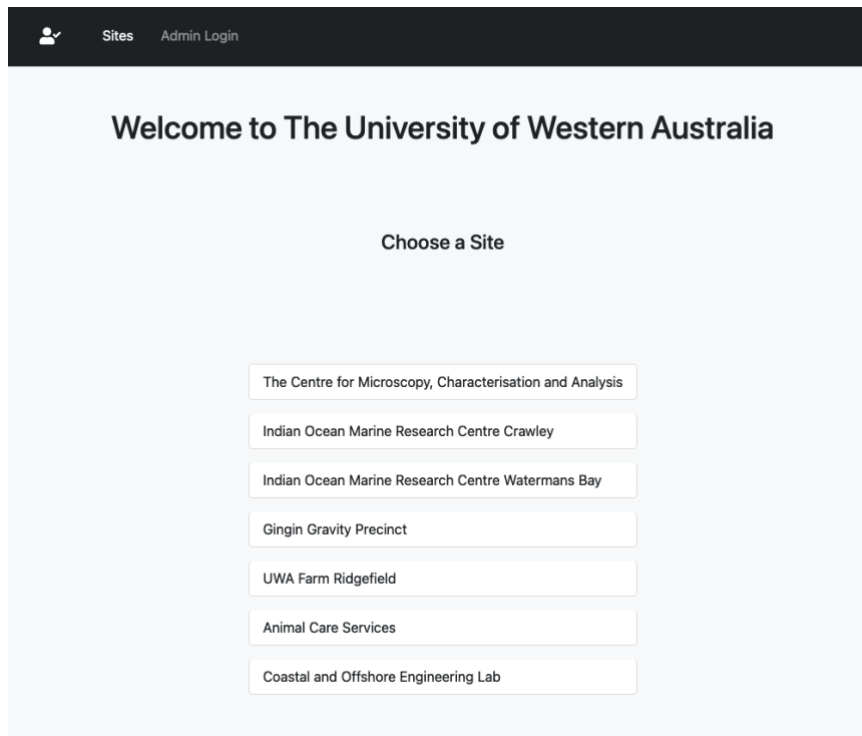
Security: In the event of a security breach, visitors who were on site during that time can be contacted.

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:

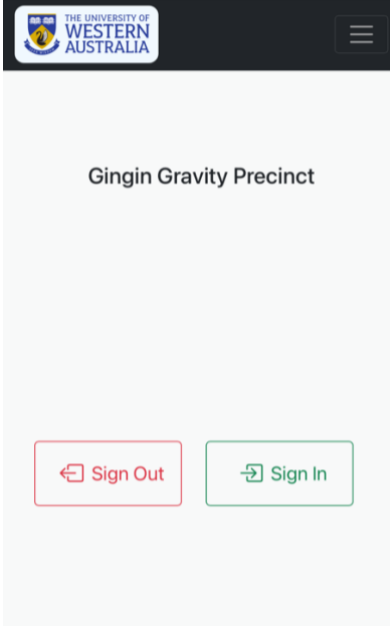


The system was intended to be set up on-site in one of two ways:

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

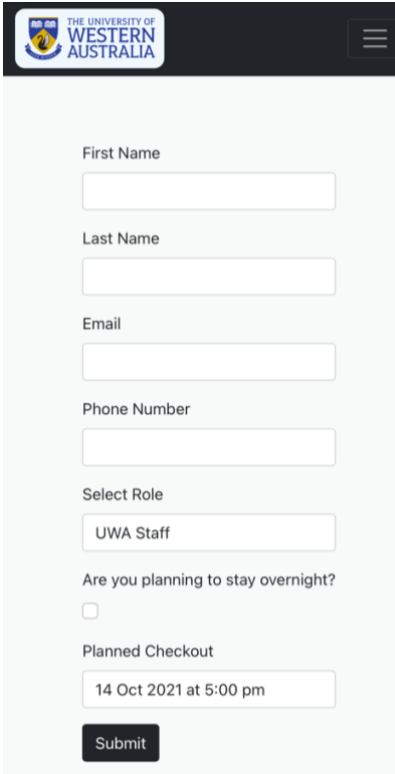
At each site, users are presented with a screen featuring two buttons:



The screenshot shows a mobile application interface for 'THE UNIVERSITY OF WESTERN AUSTRALIA'. At the top is a dark header with the university logo on the left and a hamburger menu icon on the right. The main content area is light gray and displays the text 'Gingin Gravity Precinct' in the center. At the bottom, there are two buttons: a red 'Sign Out' button with a left-pointing arrow icon and a green 'Sign In' button with a right-pointing arrow icon.

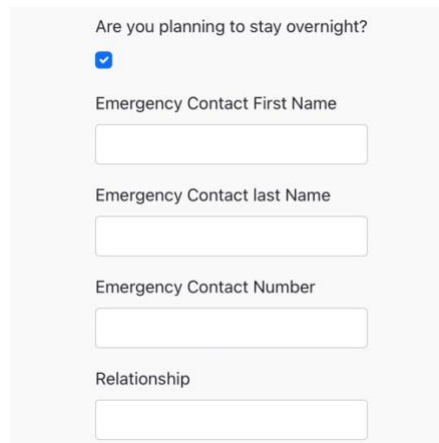
Checking In

When signing in, users are required to enter their details:



The screenshot shows a mobile application interface for 'THE UNIVERSITY OF WESTERN AUSTRALIA'. At the top is a dark header with the university logo on the left and a hamburger menu icon on the right. The main content area is light gray and contains a registration form. The form fields are: 'First Name' (text input), 'Last Name' (text input), 'Email' (text input), 'Phone Number' (text input), 'Select Role' (dropdown menu with 'UWA Staff' selected), 'Are you planning to stay overnight?' (checkbox, currently unchecked), and 'Planned Checkout' (text input showing '14 Oct 2021 at 5:00 pm'). At the bottom of the form is a dark 'Submit' button.

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



A form for emergency contact details. It starts with the question "Are you planning to stay overnight?" followed by a checked checkbox. Below this are four input fields: "Emergency Contact First Name", "Emergency Contact last Name", "Emergency Contact Number", and "Relationship".

Are you planning to stay overnight?

☒

Emergency Contact First Name

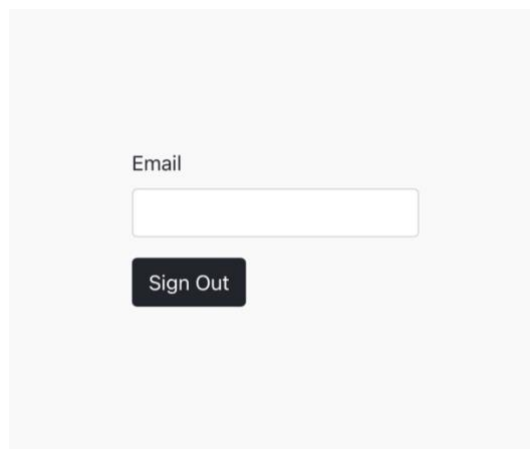
Emergency Contact last Name

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*).



A simple form for checking out. It contains a single input field labeled "Email" and a dark button labeled "Sign Out" below it.

Email

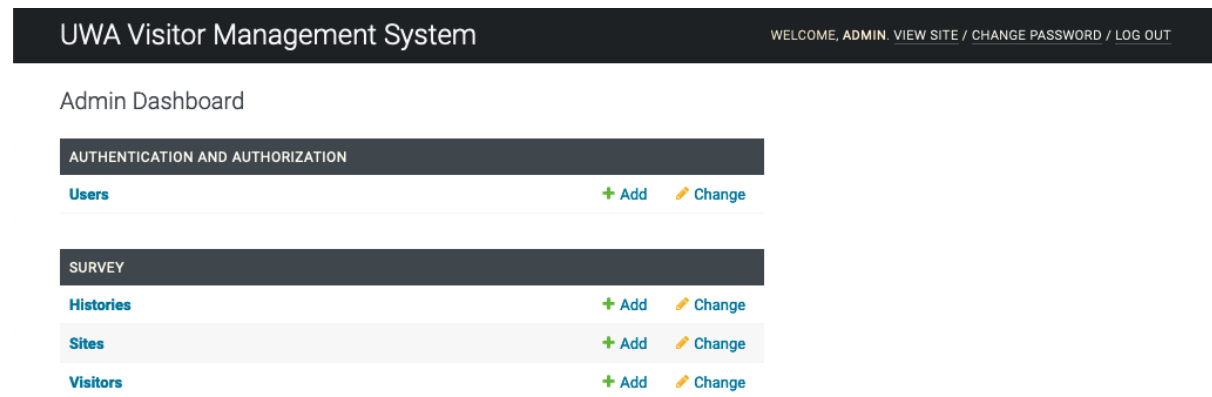
Sign Out

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:

Select visitor to change

Action: 0 of 10 selected

<input type="checkbox"/>	VISITOR NAME	ROLE	EMAIL	PHONE NUMBER	CHECKIN	PLANNED CHECKOUT	CHECKOUT	NIGHTSTAY	EMERGENCY NAME	EMERGENCY PHONE	EMERGENCY RELATION	SITE
<input type="checkbox"/>	Bernie Sanders	Other University staff	b@s.com	+61427564222	Sept. 23, 2021, 2:42 p.m.	Nov. 5, 2021, 2:48 p.m.	✔	○	-	-	-	Coastal and Offshore Engineering Lab
<input type="checkbox"/>	Barack Obama	Other University staff	b@o.com	+61426565678	Sept. 23, 2021, 2:42 p.m.	Oct. 5, 2021, 2:47 p.m.	○	○	-	-	-	Gingin Gravity Precinct
<input type="checkbox"/>	Miley Cyrus	Other University student	miley@gmail.com	+61427858222	Sept. 30, 2021, 4:32 a.m.	Sept. 28, 2021, 4:33 a.m.	○	○	-	-	-	Gingin Gravity Precinct
<input type="checkbox"/>	Ryan Reynolds	UWA Staff	r@r.com	+61427858111	Sept. 25, 2021, 2:22 p.m.	Oct. 10, 2021, 2:23 p.m.	○	○	-	-	-	Indian Ocean Marine Research Centre Wat
<input type="checkbox"/>	John doverman	UWA Staff	sjlk@cas.com	+61416241644	Sept. 25, 2021, 4:45 p.m.	Sept. 25, 2021, 9:46 p.m.	○	○	-	-	-	The Centre for Microscopy, Characterisati
<input type="checkbox"/>	Tom Cruise	Actor	tom@gmail.com	+61426565622	Sept. 24, 2021, 4:23 a.m.	Oct. 10, 2021, 4:36 a.m.	✔	○	-	-	-	Animal Care Services
<input type="checkbox"/>	Ariana Grande	Other University student	a@g.com	+61427858678	Sept. 30, 2021, 2:07 a.m.	Oct. 9, 2021, 2:14 a.m.	○	○	-	-	-	Gingin Gravity Precinct
<input type="checkbox"/>	Clint Eastwood	Contractor	c@e.com	+61426565434	Sept. 25, 2021, 2:10 p.m.	Oct. 10, 2021, 2:17 p.m.	○	○	-	-	-	Indian Ocean Marine Research Centre Wat
<input type="checkbox"/>	Michael Jackson	UWA Staff	m@j.com	+61426757888	Oct. 5, 2021, 6:15 p.m.	Oct. 27, 2021, noon	✔	○	-	-	-	Animal Care Services
<input type="checkbox"/>	John McCain	Other University student	j@m.com	+61452773400	Sept. 23, 2021, 2:42 p.m.	Sept. 12, 2021, 2:49 p.m.	○	○	-	-	-	The Centre for Microscopy, Characterisati

10 visitors

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.

<input type="checkbox"/>	VISITOR NAME	ROLE	EMAIL	PHONE NUMBER	CHECKIN	PLANNED CHECKOUT	CHECKOUT	NIGHTSTAY	EMERGENCY NAME	EMERGENCY PHONE	EMERGENCY RELATION	SITE
<input type="checkbox"/>	Bernie Sander	UWA Staff	b@s.com	+61417189919	Oct. 7, 2021, 12:15 a.m.	Oct. 7, 2021, 4 p.m.	○	○	-	-	-	Gingin Gravity Precinct

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:

<input type="checkbox"/>	VISITOR NAME	ROLE	EMAIL	PHONE NUMBER	CHECKIN	PLANNED CHECKOUT	CHECKOUT	NIGHTSTAY	EMERGENCY NAME	EMERGENCY PHONE	EMERGENCY RELATION	SITE
<input type="checkbox"/>	Bernie Sander	UWA Staff	b@s.com	+61417189919	Oct. 7, 2021, 12:15 a.m.	Oct. 7, 2021, 4 p.m.	✔	○	-	-	-	Gingin Gravity Precinct

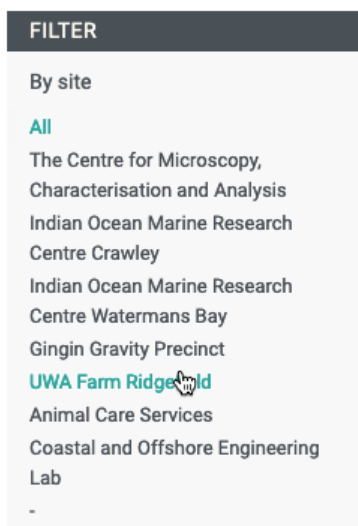
Note that the only change is there is a green tick in the 'checkout' field, meaning he has checked out. If we want to see information about his stay, we will need to check **Histories**.

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.**

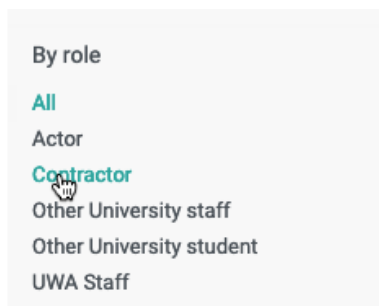
Using Filters

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.

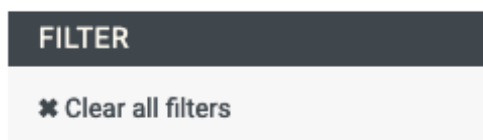
To filter by site (in the below example, we are selecting only visitors at the *Ridgefield Farm*):



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 past 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:

By site

All

The Centre for Microscopy,
Characterisation and Analysis

Indian Ocean Marine Research
Centre Crawley

Indian Ocean Marine Research
Centre Watermans Bay

Gingin Gravity Precinct

UWA Farm Ridgefield

Animal Care Services

Coastal and Offshore Engineering
Lab

-

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

By checkout

All

Yes

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.

Select history to change

ADD HISTORY +

Q Search

Action: Go 0 of 10 selected

<input type="checkbox"/>	VISITOR	CHECKIN	CHECKOUT	NIGHTSTAY
<input type="checkbox"/>	Miley Cyrus	Sept. 30, 2021, 4:32 a.m.	Oct. 8, 2021, 1:02 p.m.	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Michael Jackson	Oct. 5, 2021, 6:15 p.m.	Oct. 5, 2021, 6:15 p.m.	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Michael Jackson	Sept. 30, 2021, 3:02 p.m.	Oct. 5, 2021, 9:44 a.m.	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Michael Jackson	Oct. 5, 2021, 10:04 a.m.	Oct. 5, 2021, 10:05 a.m.	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Bernie Sanders	Sept. 23, 2021, 2:42 p.m.	Sept. 30, 2021, 3:19 a.m.	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Tom Cruise	Sept. 24, 2021, 4:23 a.m.	Sept. 24, 2021, 4:38 a.m.	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Michael Jackson	Sept. 30, 2021, 3:02 p.m.	Oct. 1, 2021, 2:18 a.m.	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Tom Cruise	Sept. 24, 2021, 4:23 a.m.	Sept. 24, 2021, 4:26 a.m.	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Tom Cruise	Sept. 24, 2021, 4:23 a.m.	Sept. 24, 2021, 4:32 a.m.	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Miley Cyrus	Sept. 30, 2021, 4:32 a.m.	Sept. 30, 2021, 4:33 a.m.	<input checked="" type="checkbox"/>

10 Histories

FILTER

By checkin

Any date

Today

Past 7 days

This month

This year

By checkout

Any date

Today

Past 7 days

This month

This year

By nightstay

All

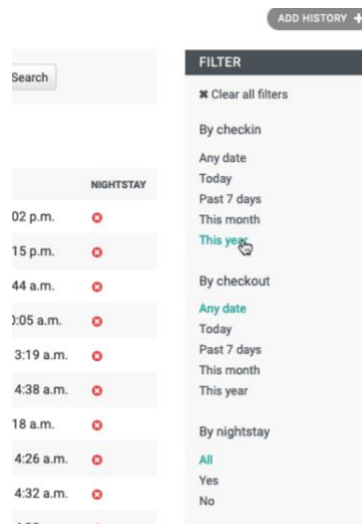
Yes

No

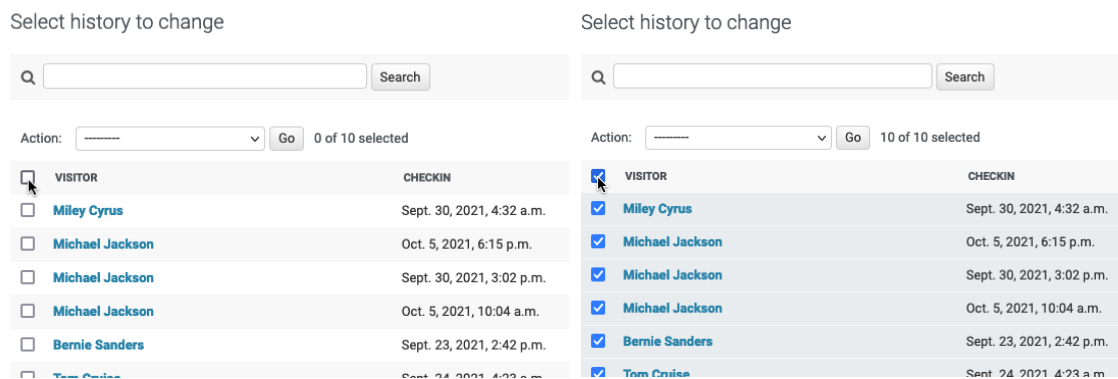
From this page, you can see the check-in and check-out time of each visitor.

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':



The screenshot shows the 'Checkins' table with three rows. The first row is highlighted. A context menu is open over the first row, showing the options 'Delete selected Histories' and 'Export Selected'. The 'Export Selected' option is highlighted in blue. The table has columns for 'Action', 'VISIT', and 'CHECKIN'.

Action	VISIT	CHECKIN
<input checked="" type="checkbox"/>	10 of 10 selected	
<input checked="" type="checkbox"/>	Miley Cyrus	Sept. 30, 2021, 4:32 a.m.
<input checked="" type="checkbox"/>	Michael Jackson	Oct. 5, 2021, 6:15 p.m.
<input checked="" type="checkbox"/>	Michael Jackson	Sept. 30, 2021, 3:02 p.m.

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

Add a 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.

Add site

Site Details

Name:

New Site

☐ Accomodation

Save and add another

Save and continue editing

SAVE

Remove a site

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

Select site to change

Action:

Go

1 of 7 selected

<input type="checkbox"/>	NAME	ACCOMODATION
<input checked="" type="checkbox"/>	Gingin Gravity Precinct	✓
<input type="checkbox"/>	Animal Care Services	✗
<input type="checkbox"/>	UWA Farm Ridgefield	✓

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

Select site to change

Action:

✓

Go

1 of 7 selected

Delete selected kites

<input type="checkbox"/>	NAME	ACCOMODATION
<input checked="" type="checkbox"/>	Gingin Gravity Precinct	✓
<input type="checkbox"/>	Animal Care Services	✗
<input type="checkbox"/>	UWA Farm Ridgefield	✓

Managing Administrator Accounts

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

Admin Dashboard

AUTHENTICATION AND AUTHORIZATION

[Users](#) [+ Add](#) [Change](#)

SURVEY

[Histories](#) [+ Add](#) [Change](#)

[Sites](#) [+ Add](#) [Change](#)

[Visitors](#) [+ Add](#) [Change](#)

You will see a list of administrator accounts:

Select user to change

Q

Action: 0 of 2 selected

<input type="checkbox"/>	USERNAME	FIRST NAME	LAST NAME	EMAIL ADDRESS	SUPERUSER STATUS	ACTIVE	STAFF STATUS	LAST LOGIN
<input type="checkbox"/>	Main_Admin	Farshad	Ghanbari	admin@admin.com	✓	✓	✓	Oct. 9, 2021, 12:48 a.m.
<input type="checkbox"/>	Other_Admin	Steve	Clarke	admin2@admin.com	✗	✓	✓	Oct. 9, 2021, 12:45 a.m.

2 users

Adding a new administrator

To add a new admin, select 'add user':

ADD USER +

Add details as required:

User Details	
First name:	<input type="text" value="New"/>
Last name:	<input type="text" value="Admin"/>
Email address:	<input type="text" value="new@admin.com"/>

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

Permissions

User permissions:

Available user permissions

- admin | log entry | Can add log entry
- admin | log entry | Can change log entry
- admin | log entry | Can delete log entry
- admin | log entry | Can view log entry
- auth | group | Can add group
- auth | group | Can change group
- auth | group | Can delete group
- auth | group | Can view group
- auth | permission | Can add permission
- auth | permission | Can change permission
- auth | permission | Can delete permission

Choose all

Remove all

Chosen user permissions

Specific permissions for this user. Hold down "Control", or "Command" on a Mac, to select more than one.

☐ Superuser status
Designates that this user has all permissions without explicitly assigning them.

☒ Staff status
Designates whether the user can log into this admin site.

☒ Active
Designates whether this user should be treated as active. Unselect this instead of deleting accounts.

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

☒ **Staff status**
Designates whether the user can log into this admin site.

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

Login Details - Required

Username:

Required. 150 characters or fewer. Letters, digits and @/./+/-/_ only.

Password:

Your password can't be too similar to your other personal information.
Your password must contain at least 8 characters.
Your password can't be a commonly used password.
Your password can't be entirely numeric.

Password confirmation:

Enter the same password as before, for verification.

Save and add another

Save and continue editing

SAVE

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.

☒ **Superuser status**
Designates that this user has all permissions without explicitly assigning them.

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

15

Permissions

User permissions:

Available user permissions

Q Filter

auth | user | Can add user

auth | user | Can change user

auth | user | Can delete user

auth | user | Can view user

Choose all

Chosen user permissions

admin | log entry | Can add log entry

admin | log entry | Can change log entry

admin | log entry | Can delete log entry

admin | log entry | Can view log entry

auth | group | Can add group

auth | group | Can change group

auth | group | Can delete group

auth | group | Can view group

auth | permission | Can add permission

auth | permission | Can change permission

auth | permission | Can delete permission

auth | permission | Can view permission

contenttypes | content type | Can add content type

Remove all

Specific permissions for this user. Hold down "Control", or "Command" on a Mac, to select more than one.

☐ Superuser status

Designates that this user has all permissions without explicitly assigning them.

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:

System

WELCOME, FARSHAD. [VIEW SITE](#) / [CHANGE PASSWORD](#) / [LOG OUT](#)

+ Add

Change

Follow the prompts to change your password.