Visitor Management System Guide

Version	1.0
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Version	
Date	
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1. Introduction

The Visitor Management System (VMS) is a web-based application designed to streamline visitor entry and tracking within the organization. It allows employees, visitors, and security personnel to register visitors, manage approvals, and monitor visitor flow efficiently. Followings are the features of the application:

1. Individuals Log-in(Employees, Admin, Security Personnel)
2. Visitor Registration
3. Email to approval
4. Gate Pass Creation
5. Check-In, Check-Out
6. Dashboard
7. Report Generation
8. Admin features

2. System Requirements

To ensure the best experience, the following system requirements are recommended:

- Browser Compatibility: Latest versions of Microsoft Edge, Chrome, or Firefox.
- Operating Systems: Windows 10, Windows 11, macOS, etc.
- Internet Connectivity: Stable Broadband Connection.

3. Accessing the application

To access the Sales Order Change Request Application, follow these steps:

- Open your web browser and type the application URL into the address bar *https://inauw028.kohlerco.com:8054/*
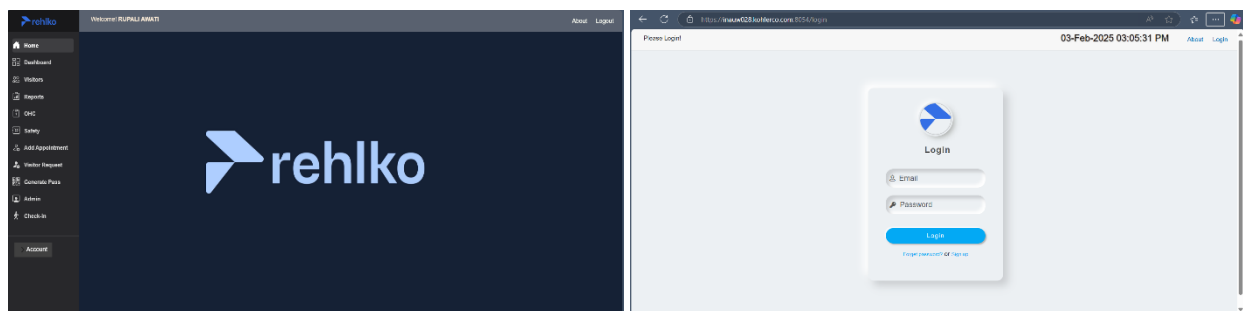
Image 1: Home page and Log-in page

- Login with your credentials: Registered email and password
- Every user has his own ID and password, ID will be office email ID and password will be provided individually. After first login, that it is mandatory to change the password using the 'Change Password' functionality.
  Refer below image

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Image 2: Change Password

4. User and Permissions

User roles are as follows:
      a. **Company Employees including Admins**
      b. **Security Personnel**
      c. **Visitors**

a) Company Employees
      a. Employee users can make appointments after authorizing login using Create Appointment tab, also there is no need to approve visitor since appointments are created by employee users.
      b. If security personnel or visitor make appointments, the employee user needs to approve appointments using Visitor Request tab.

b) Security Personnel
      a. Security personnel can make appointments after authorizing login using Create Appointment tab, also they have the facility to generate the gate pass, also they can check-in and check-out the visitors.

c) Admin
      a. Full system access, including reports download, user management and settings.

5. Functionalities

Below mentioned features are available for this application.
1. Visitor appointment creation
2. Email Notifications
3. Approve/Cancel the appointment
4. Gate pass generation
5. Check-In, Check-out
6. Visitors detail Page
7. Reports
8. Dashboard
9. Admin Panel
10. Password Change

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1. Visitor appointment creation

To make an appointment user will open the Application in web browser using URL. After successfully log-in the application will switch to the Home Page then click on **Add Appointment** on menu bar. Refer below image 3 for more details:
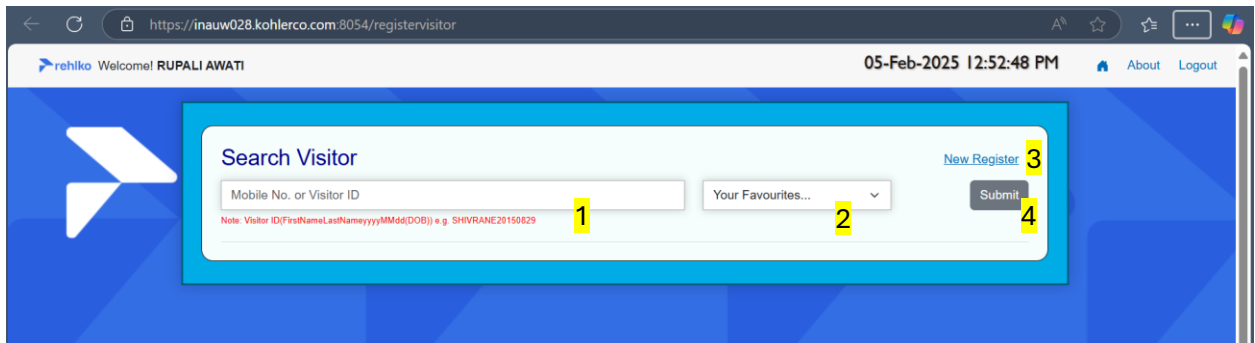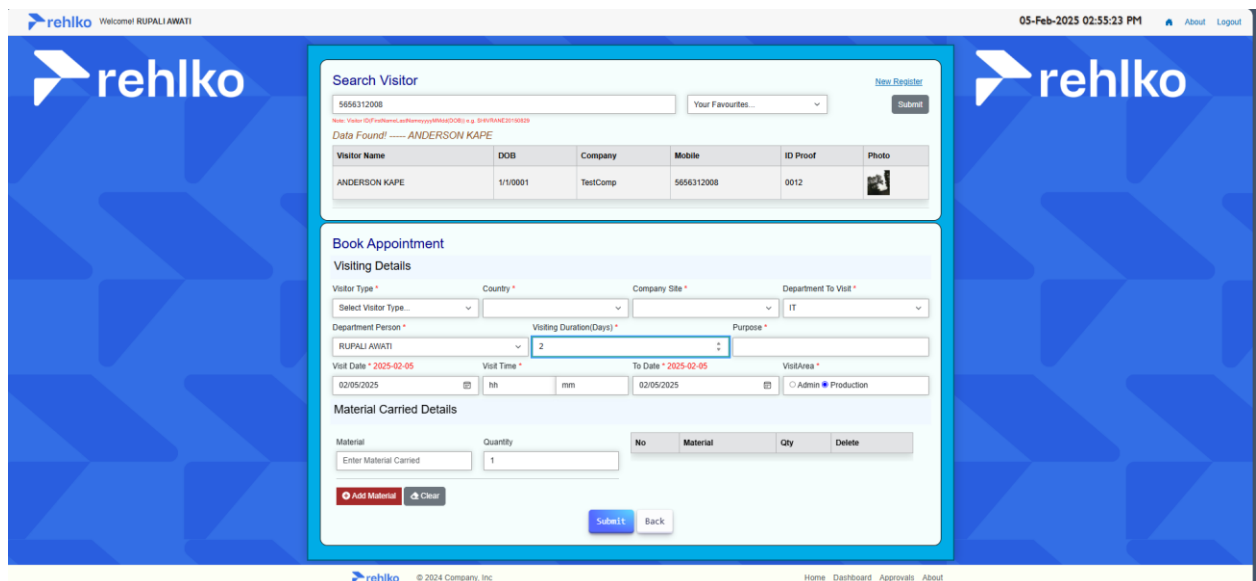

Image 3: Request Form Page

       Step 1: Enter mobile number or Visitor Id then Submit to search visitor details if already registered
       Step 2: Favorites option only for employees and security users.
       Step 3: New Register if visitor not registered.

- If visitor found after submit or selection of favorites the appointment form will shown with visitor details as shown in image 4.

Image 4: Appointment Form

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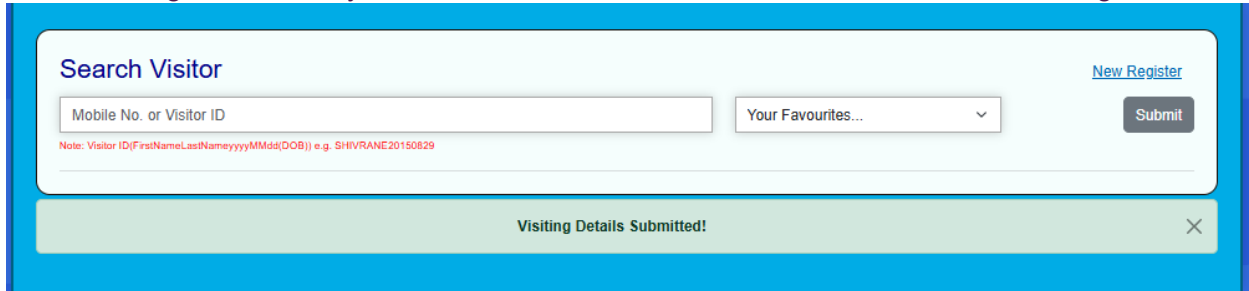
The appointment form includes below fields to fill (Please note all fields are mandatory)

- Visitor Type
- Country
- Company Site
- Department To Visit (Auto fetched for emp user)
- Department Person (Auto fetched for emp user)
- Visiting Duration
- Purpose
- Visit Date
- Visit Time (24hrs format)
- To Date (Only if the duration is more than 1)

Here lastly need to add material carried by visitors. For adding materials follow below steps.

i.   Enter material name
ii.   Enter quantity
iii. Click on Add Material button (Clear button clears all material)

After entering all necessary details click on blue **Submit** button, it will show a message like this.
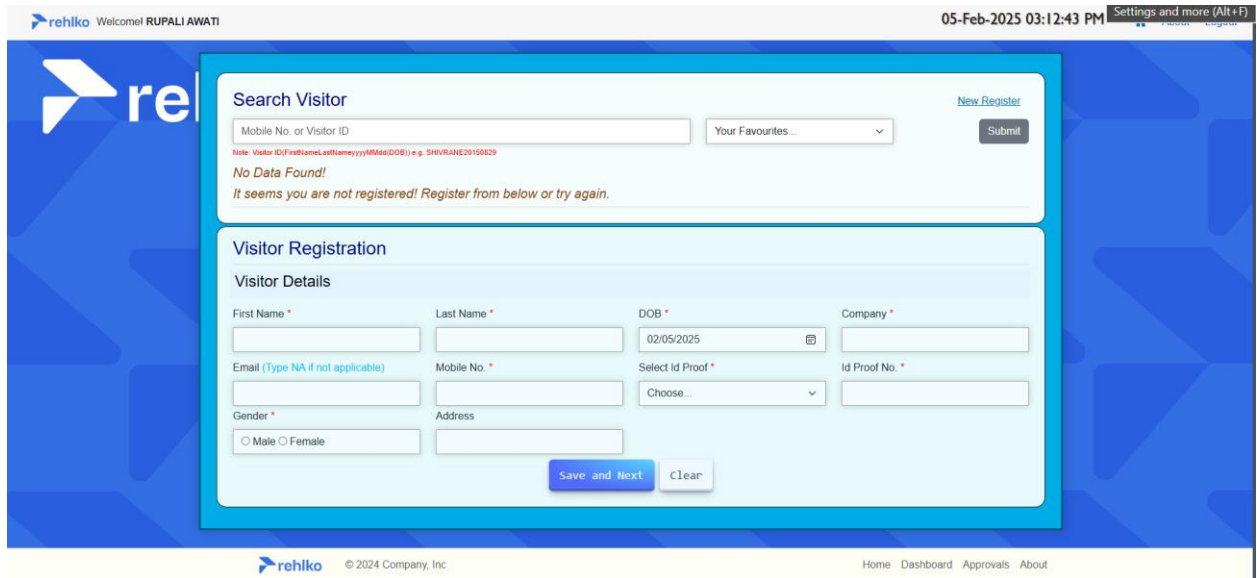
It means that appointment successfully submitted.

I. New registration

If the visitor is not found or after clicking on New Register the following registration form will appear. Refer below image 5 for reference:

Image 5: Visitor Registration form

Visitor Registration
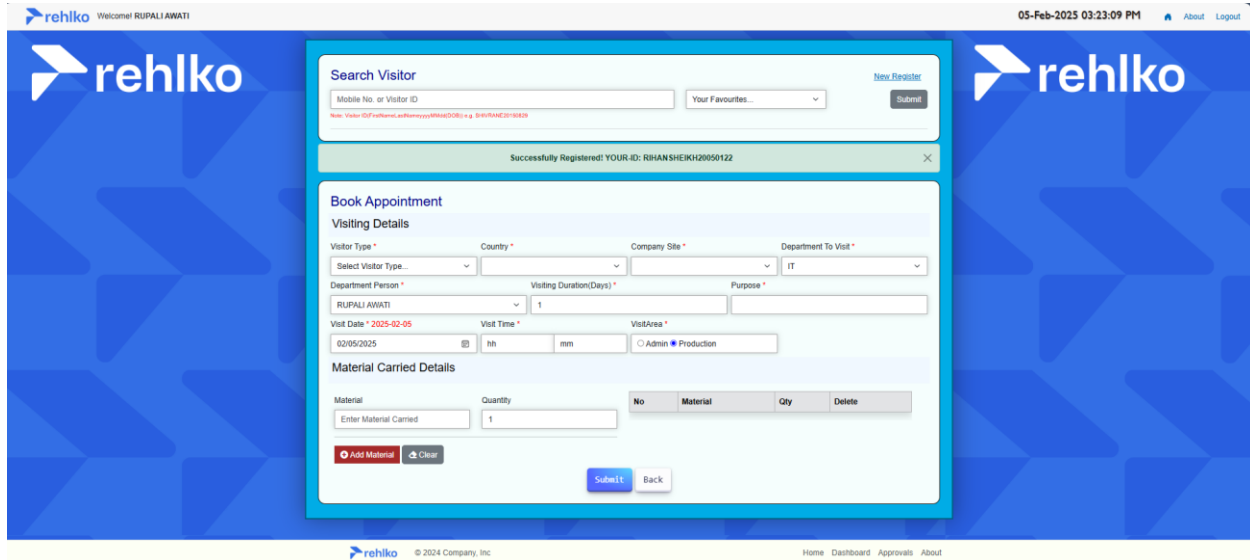
There are three criteria for visitor registration
  I.   From visitor side
  II.   From Employee user side
  III. From Security personnel side

The following fields are necessary for registration.
* First Name
* Last Name
* Date of Birth
* Company (Visitor's Company)
* Email (if email not available type NA)
* Mobile Number (Only 10 digits)
* Photo (Only form security side)
* Id Proof
* Id Proof Number
* Gender
* Address

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After entering all details Click on **<u>Save and Next</u>** button, it will show you a success message and redirect to appointment form, now you can directly make an appointment. Refer image no. 6

Image 6: Successful Registration

2. Email Notification

i. Email notification of approval to emp user

- Email notification will go to the Employee user after appointment set through visitor or security personnel for approval.
- Clicking on Click Here to Approve/Decline user will redirect to Visitor request page. Here user can approve or decline the appointment.

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- Refer image 7 of email format.

Rahul Nagrikar
To: ● Rahul Nagrikar

☺ ← Reply ← Reply all → Forward ⬦ 📧 📇 …
Wed 2/5/2025 9:38 PM

Hello,

Details of the visitor as given below.

Name	Visit Date	Visit Time	To Date	Purpose	To Meet
AMAN SHARMA	2/5/2025	14:10	2/5/2025	Meeting	RAHUL NAGRIKAR

Click Here To Approve/Decline

Thank You

← Reply   → Forward
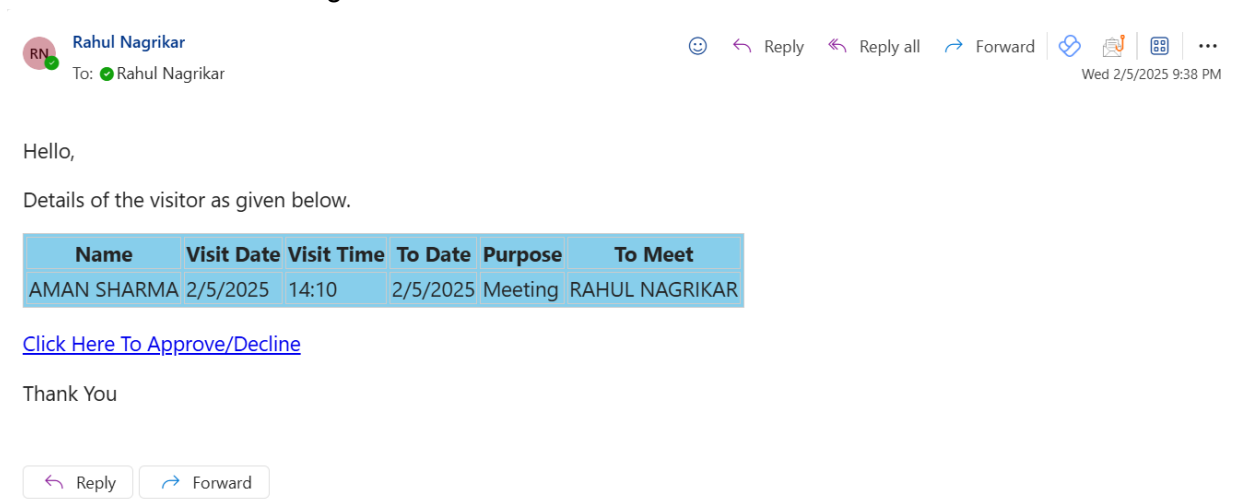
Image 7: Email Notification Format for Approval

ii. Email notification of security approval to emp user

- If approval approved by security personnel, then also user get the email notification that associated visitor appointment approved by security personnel. Refer image no. 8.
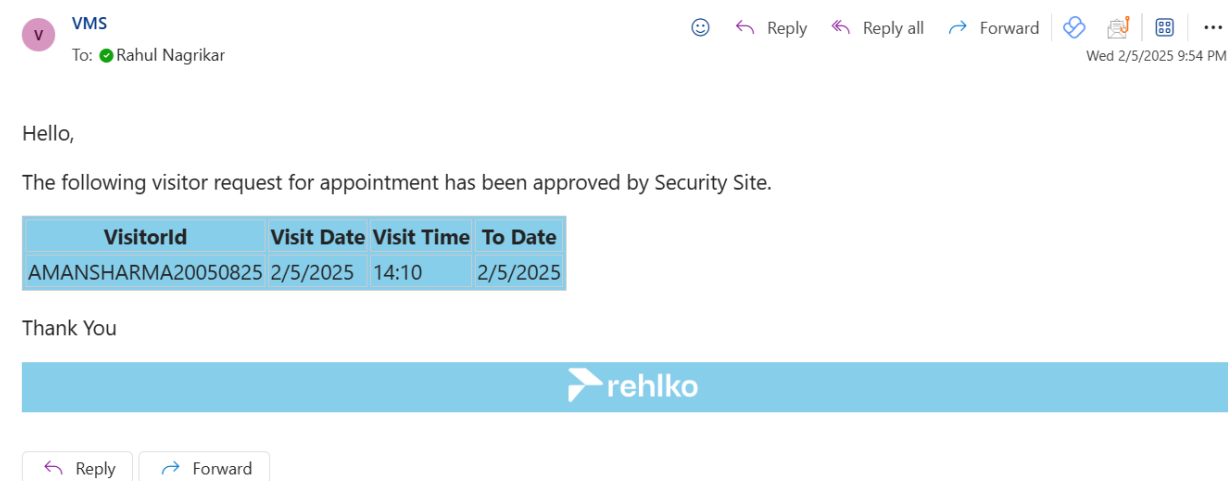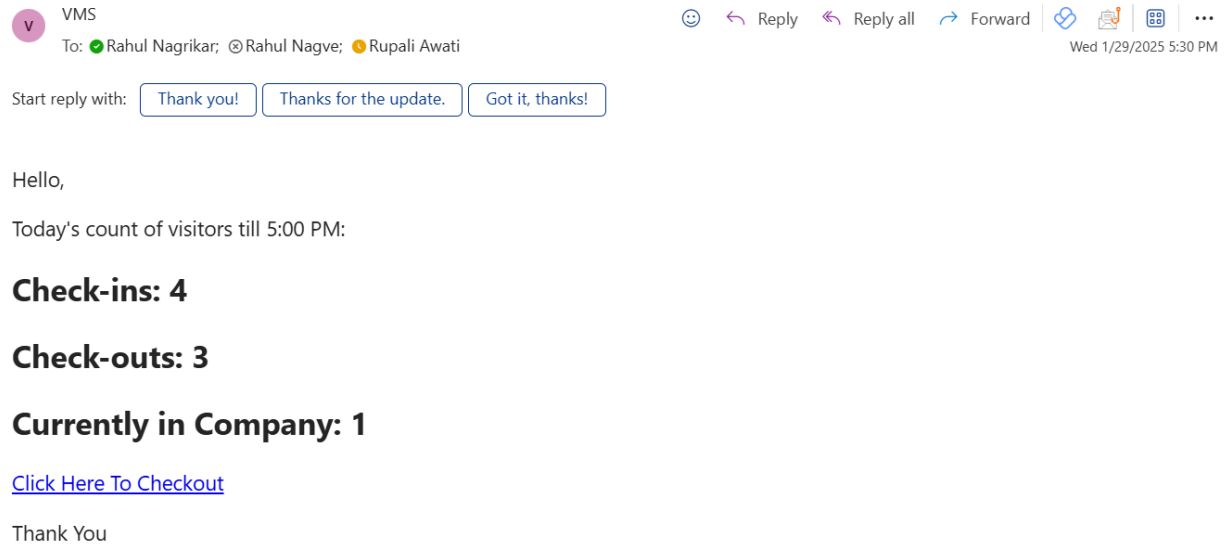
VMS
To: ● Rahul Nagrikar

☺ ← Reply ← Reply all → Forward ⬦ 📧 📇 …
Wed 2/5/2025 9:54 PM

Hello,

The following visitor request for appointment has been approved by Security Site.

VisitorId	Visit Date	Visit Time	To Date
AMANSHARMA20050825	2/5/2025	14:10	2/5/2025

Thank You

rehlko

← Reply   → Forward

Image 8: Email Notification Format Approved from security side

iii. Email Notification of daily count of visitors to admins

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The email will send to admin daily at 5:30 pm with daily count of visitors. Refer Image 9.

VMS
To: Rahul Nagrikar; Rahul Nagve; Rupali Awati

Reply | Reply all | Forward

Wed 1/29/2025 5:30 PM

Start reply with: Thank you! | Thanks for the update. | Got it, thanks!

Hello,

Today's count of visitors till 5:00 PM:

Check-ins: 4

Check-outs: 3

Currently in Company: 1

Click Here To Checkout

Thank You

Image 9: Email Notification Daily count

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3. Approve/Cancel the appointment (Only Employee User & Admin)

Click on **Visitor Request** on menu bar

If appointment is set by security personnel or from visitor. Then only users can approve visitors. If emp user made an appointment, then it will auto approve appointment. Refer image 10.
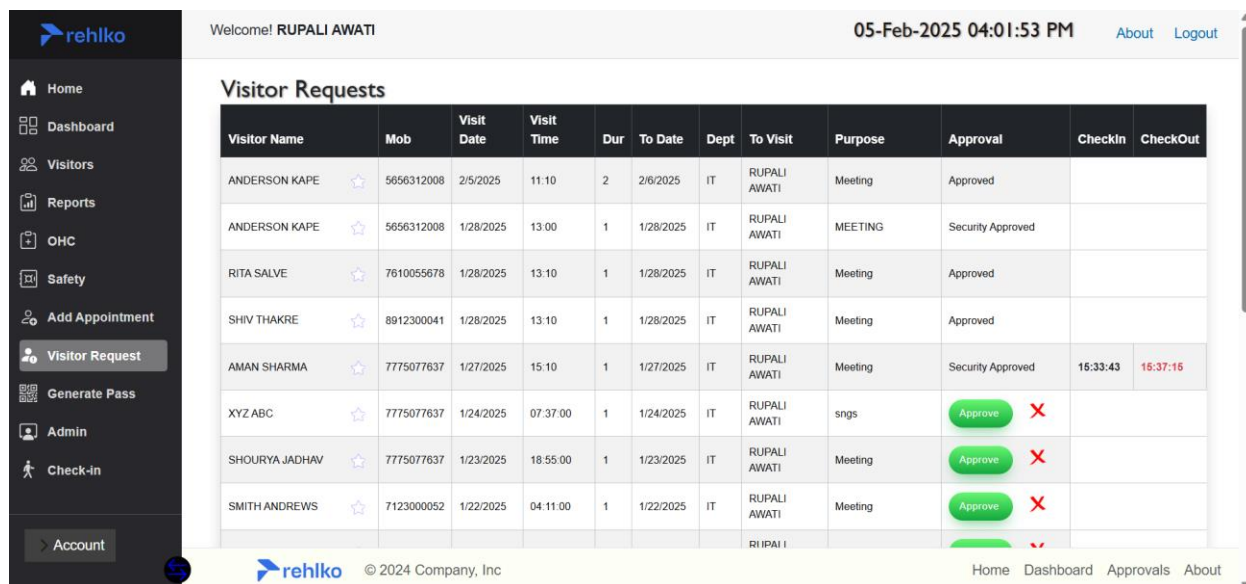
Image 10: Visitor Request Approval/Cancel page

4. Gate Pass Generation

Only admin and security personnel can generate Gate Pass.

- Click on generate pass on menu bar. It will open generate pass page, refer image no. 11
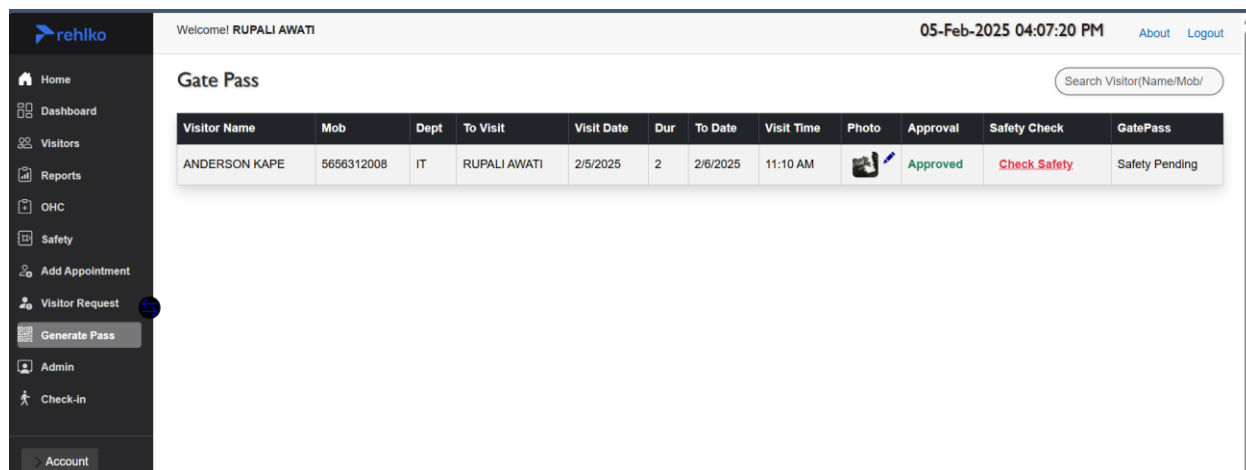
Image 11: Generate Pass page

- Input all mandatory details like photo, safety check.

- If approval is pending, and security personnel contacted with employee user for approval then security personnel can approved appointment from their side. As shown in the image below.

- Check the checkbox and click to approve.

- Click on gatepass icon, it will open pop-up of gate pass as shown in image 12.

Image 12: Gatepass popup

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5. Check-In/Check-Out

- For check-in and check-out of visitors click on Check In button on menu bar, as shown in fig. 13
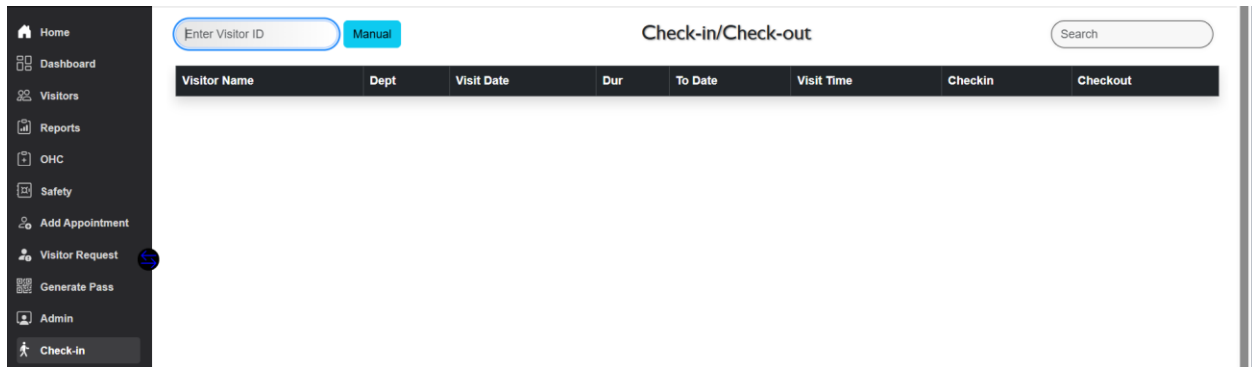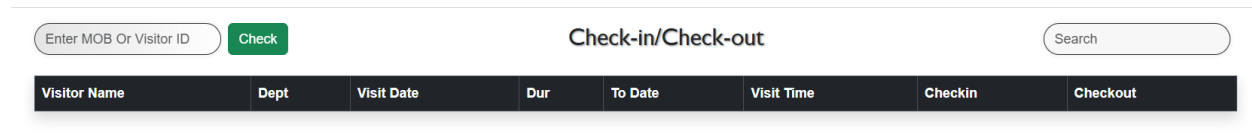

Image 13: Check-In/Check-Out page

- Here we can directly scan QR code from gatepass to check-in or check-out visitors
- For manual check-in or check-out click on blue manual button. It will change button like below.

- Here using mobile number or visitor id of visitor the check-in/check-out is possible.
- Just enter valid mobile number or visitor id and click on check button it will make transaction.

6. Visitor details page

- Here date wise visitor details is displayed.
- Clicking on View button of carried material column the materials carried by visitor will be displayed.
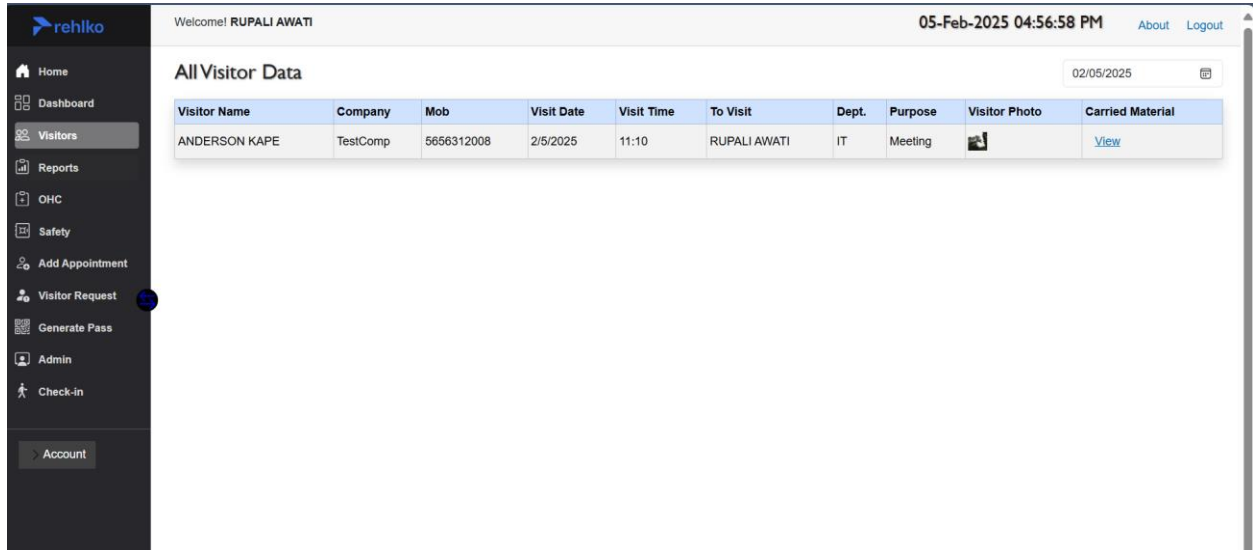

Image 14: Visitor Details Page

7. Report Generation

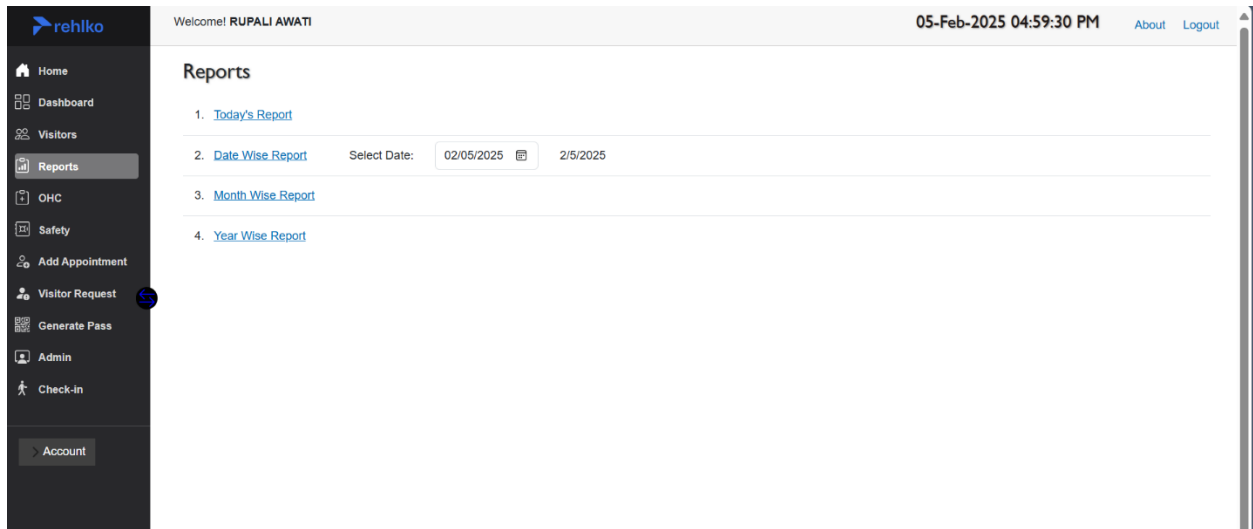- Clicking on Reports button from the menu bar, the reports page will open.

Image 15: Reports Page

- Here clicking on Today's report, the today's report will be downloaded in excel format.
- Date Wise report downloaded according to selection of date.
- Month wise report will be downloaded the current month report same with year wise report downloads current year details.

8. Dashboard

- Dashboard is visible for all users.
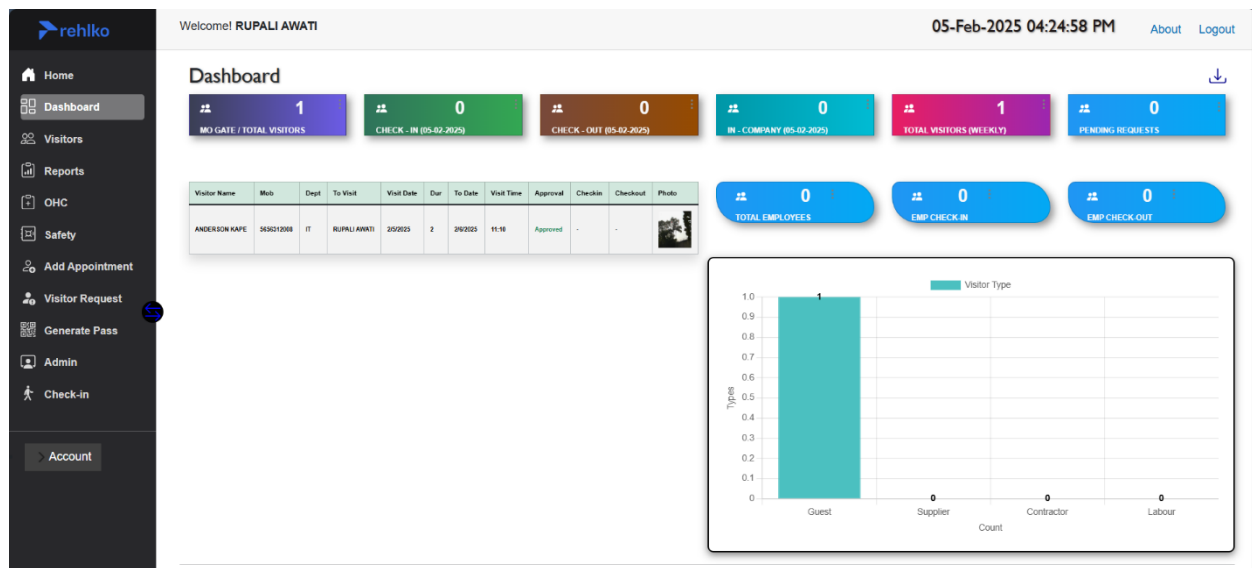- Clicking on any card will show filter data according to card.

Image 16: Dashboard

9. Admin Panel

- Here authorize admin can enter and allow employee users or security personnel to make appointment and can give roles. Refer fig. 17
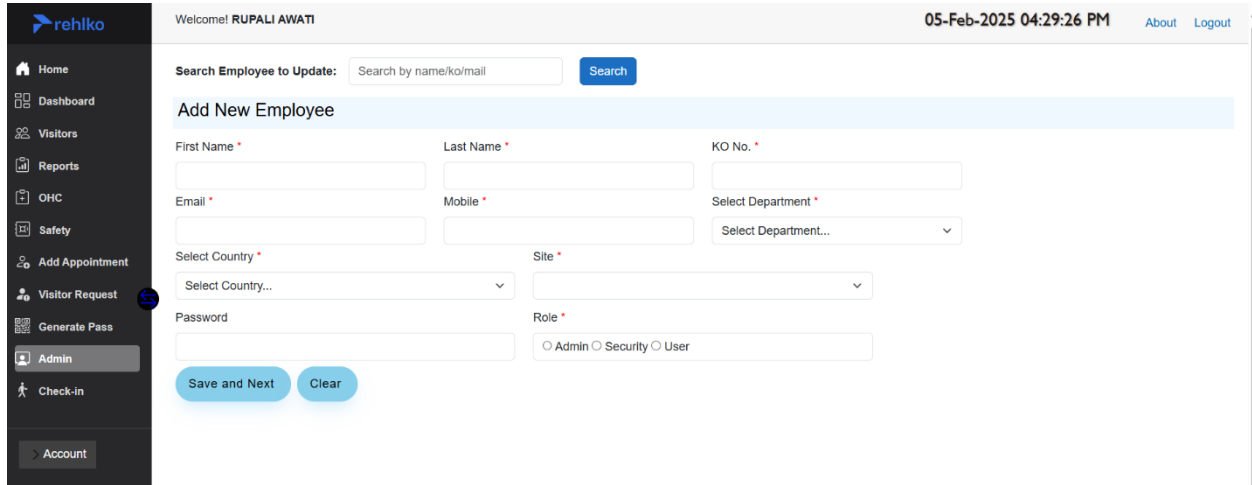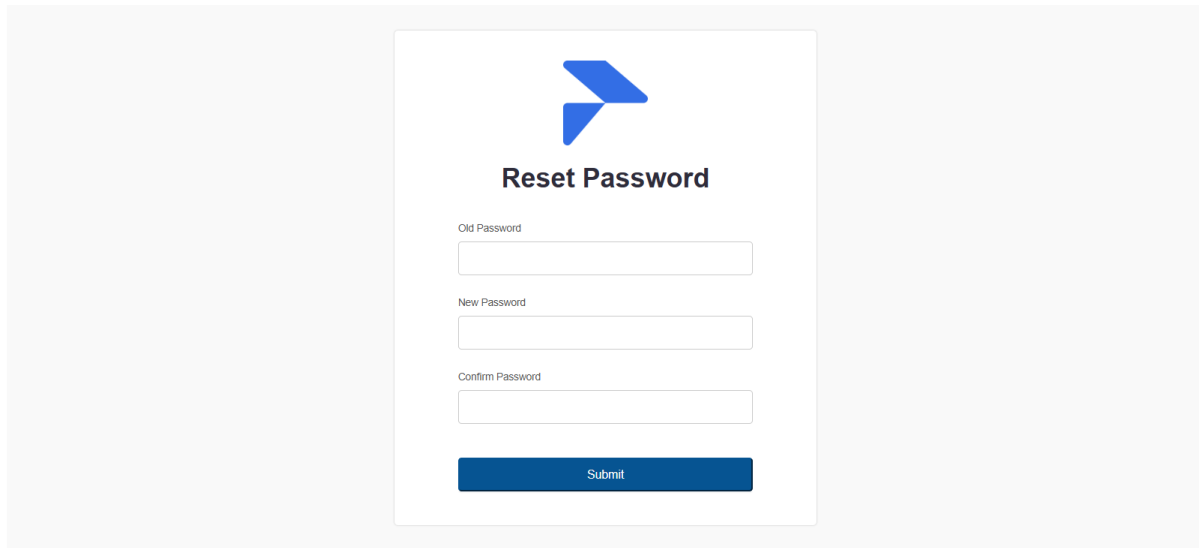

Image 17: Admin Panel

10. Password Change

- For changing password click on **Accounts** on menu bar then on **Change Password** button

- Old password is mandatory or contact IT, refer image no. 18

Image 18: Change Password page

6. FAQ/Troubleshooting

1. What if forgot my password?
   - Contact to Administrator.
2. Why is gate pass icon not visible?
   - Check message in the place of gatepass icon
3. Visitor not found?
   - Enter proper mobile number or visitor id.

7. Contact Information

For any issues, questions, or feedback, please contact us through the following:
Email: IT department , EDAU, INDIA