



DataByte
DYNAMIC SOLUTIONS

VISITORS MANAGEMENT SYSTEM USER GUIDE

Contents

Contents	1
Setting up	2
Acquiring administrative rights	2
Creating Employees / Officers	3
New Employees	3
Updating existing Employees	3
Launching the product	4
From the Dashboard	4
Product Switcher	4
Visits	5
Overview of the main page	5
What is a visit?	5
Statuses of Visits	5
In	5
Out	6
Tag Returned	6
Adding a Visit	6
Visit Details	6
Visitor Details	7
Searching for existing visitors	8
Scanning National Identity Cards and Passports	9
Editing a Visit	10
Managing Companies	11
Managing Tags	12
Managing Visitors	13
Deny visitor entry	13
Reports	14
Complete Report	14
Tag Report	14
Emergency Report	14
Automatic Visit Anonymisation	15

Setting up

This section will outline how to setup DataByte Visitors for the first time.

Acquiring administrative rights

Start by logging in to DataByte Fusion - <https://fusion.databyte.com.mt/>. The landing page will be a dashboard displaying all products purchased, on trial, or available for purchase.

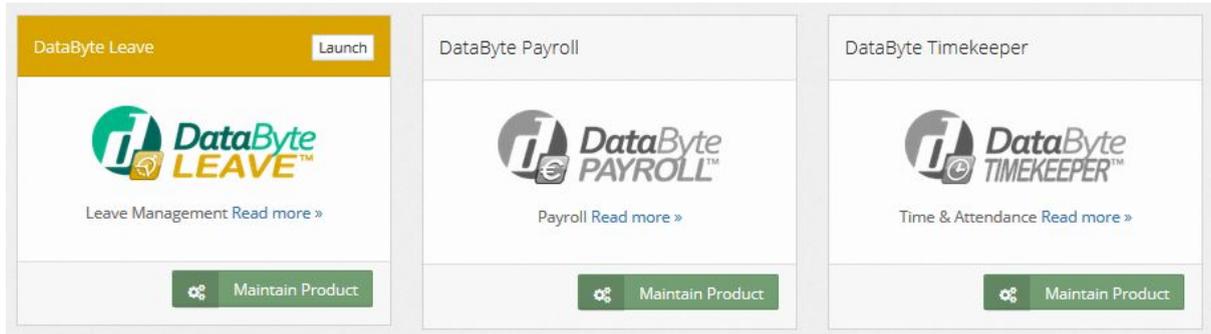


Figure 1 - List of products purchased, on trial, or available for purchase

Products that are purchased for the organisation will display a “maintain product” button. Click this button on the **DataByte Visitors widget** to proceed to the “Product Permissions” page, where each user can be assigned with their designated role / permission. Make sure you assign both the “Administrator” and “User” roles to your user account to have control over the product. Optionally, proceed with assigning permissions to the rest of the users.

Manage user roles for Visitors		
User	Administrator	User
Daniele Ventorino (gfjvpheu@sharklasers.com)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
John Doe (johndoe@example.com)	<input type="checkbox"/>	<input type="checkbox"/>
Mark Driver (rizewizapi@refurhost.com)	<input type="checkbox"/>	<input type="checkbox"/>
Mary Smith (marysmith@example.com)	<input type="checkbox"/>	<input type="checkbox"/>

Figure 2 - List of users and assigned permissions for DataByte Visitors

After assigning the **Administrator** and **User** roles to your own user, the DataByte Visitors widget in the dashboard will no longer appear greyed out, but will be fully visible and displays a “Launch” button:



Figure 3 - State of DataByte Visitors widget after assigning roles

Creating Employees / Officers

Visits are dependent on Officers, and these need to be created on Fusion before using DataByte Visitors.

On Fusion, these Officers are represented as Employees which can be created from the "Manage Employee" page (for further information see "Manage Employee" section in "Fusion Guide" document).

New Employees

Proceed by clicking on the "Add Employee" button in the "Manage Employee" page and fill-in at least the required details in yellow. Make sure that the **Visitors option at the top** is selected (linked) to make use of this employee in DataByte Visitors, therefore an Officer. When satisfied, click the "Save" button to create the employee.

Updating existing Employees

You can update existing employees to link them with DataByte Visitors by clicking "Edit" next to the employee on the "Manage Employee" page, selecting the **Visitors option at the top** and saving the form. This employee will now be used as an Officer in DataByte Visitors.

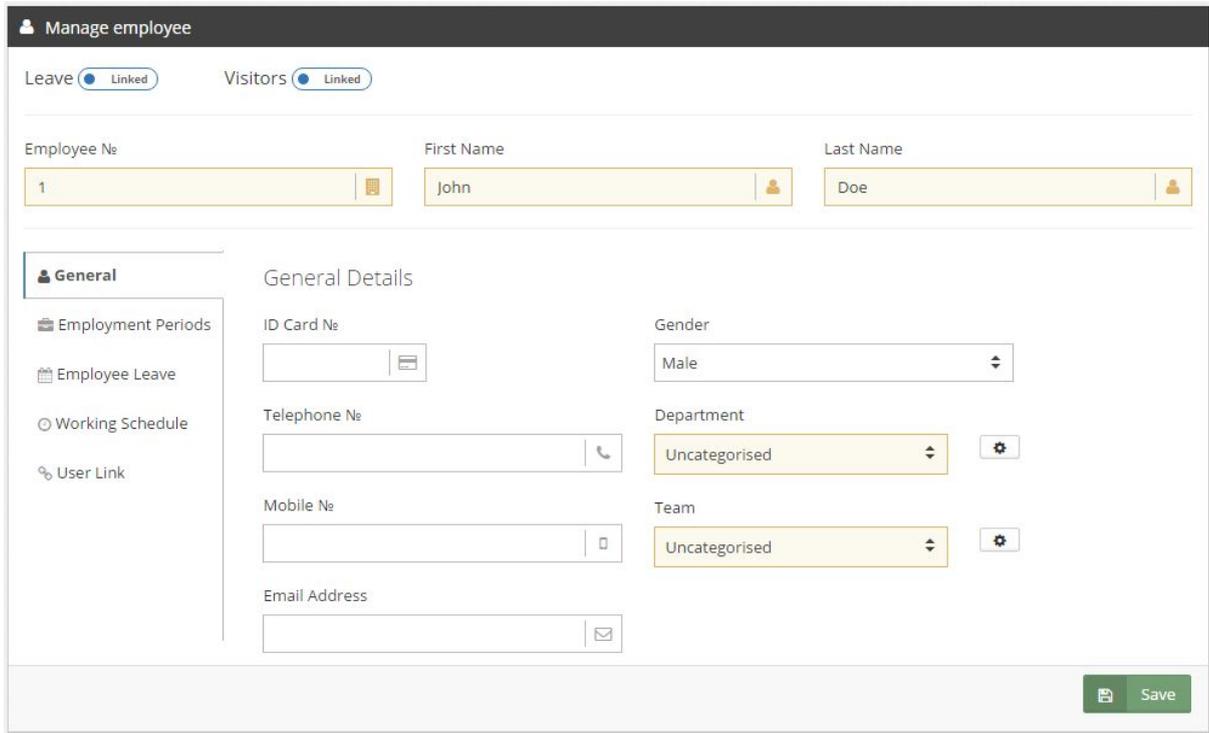


Figure 4 - Create / Update employee form showing product selection links at the top

Launching the product

You can navigate to DataByte Visitors in the following ways:

From the Dashboard

On fusion dashboard, you can click on the “Launch” button that is present on the **DataByte Visitors widget** (see Figure 3).

Product Switcher

On the very top of the left menu is the “Product Switcher” item. Clicking this will display all the active products and Fusion Dashboard items. Click on “Visitors” to navigate to the product.

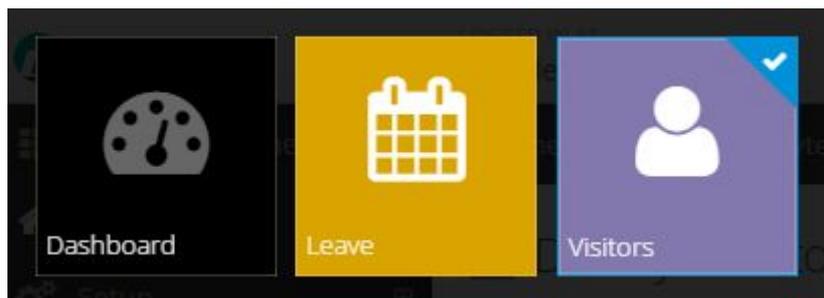


Figure 5 - Product switcher

Visits

This section will explain the business logic of visits and their lifecycle.

Overview of the main page

On the top-right corner of the page is the date of visits that are being shown. The date can be changed either by navigating with the “previous” and “next” buttons or by directly entering a date in the box.

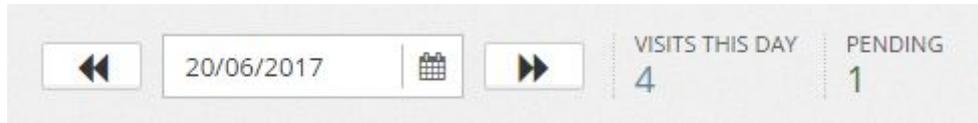


Figure 6 - Date box and visits count

Next to the box is also shown the number of passed visits and future visits.

The main widget is where the list of past and upcoming visits are displayed. Visits are divided into two separate lists: **Meetings** and **Walk-In**. Meetings are visits that are bound with a company, while Walk-In visits have no company and are tagged as “Walk-In”.

Visitor	Company	Time	Destination	Contact	In	Tag	Out	Tag Returned	Status	Actions
Mr Dave Smith	google	09:38	Paul Smith - Administration	99445588	<input checked="" type="checkbox"/>	Tag 2	<input type="checkbox"/>	<input type="checkbox"/>	In Building	
Mr Matthew Castle	google	09:38	Paul Smith - Administration		<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	In Building	
Mr Ray Penbar	google	09:38	Paul Smith - Administration		<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	In Building	

Figure 7 - Visit list (“Meetings” tab open); Showing three different visitors attending the same visit

What is a visit?

A visit consists of an Officer (who is responsible of the visit), date and time, visitor details and any assigned tags. When adding a visit (see section *Adding a Visit*), multiple visitors can be added to the same. As Figure 7 shows, there are three visitors that are grouped to the same visit (same time, and destination).

Statuses of Visits

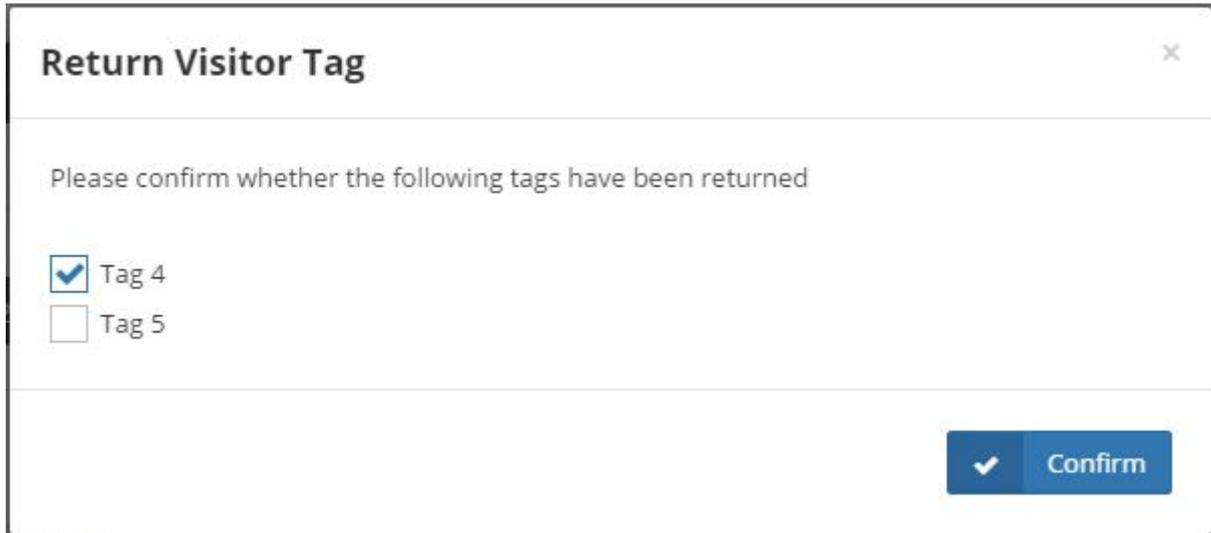
A visit can be marked as **In**, **Out** and **Tag Returned** by selecting the appropriate checkbox.

In

A visit should be marked as **In** when the visitor has entered the building and checked-in to the visit. This will disable the “Assign tag” and “Delete visit” buttons. If multiple visitors are part of the same visit, the user is asked to perform the same action for all the other visitors as well (check-in all visitors).

Out

A visit should be marked as **Out** when the visitor has exited the building. If multiple visitors are part of the same visit, the user is asked to perform the same action for all the other visitors as well (check-out all visitors). If tags were assigned to any visitors that are checked-out, the user is then prompted with a message to confirm that the assigned tags have been returned.



The image shows a dialog box titled "Return Visitor Tag" with a close button (X) in the top right corner. The main text inside the dialog reads "Please confirm whether the following tags have been returned". Below this text, there are two items: "Tag 4" with a checked checkbox and "Tag 5" with an unchecked checkbox. At the bottom right of the dialog, there is a blue button with a white checkmark icon and the text "Confirm".

Figure 8 - Displaying the list of tags that should be returned after checking out

Tag Returned

Visits can be marked with this status individually if perhaps the tag was not returned immediately upon checking out directly and was returned later.

Adding a Visit

On the "Home Page", visits can be added either by clicking the "Add Visit" button above the visit list, or by clicking the "+" button on an existing visit to extend it and add another visitor to it.

Adding a visit is divided into two sections:

- Visit details – Date, time, Officer and additional remarks
- Visitor details – Visitor information and assigned tag

Visit Details

The **Date & Time** fields are automatically filled with the current date and time, but can be changed to create appointments in the future or in the past.

By default, the visit is marked as "Checked In" assuming that the visitor has already entered the premises.

An officer has to be selected to be the destination of this visit.

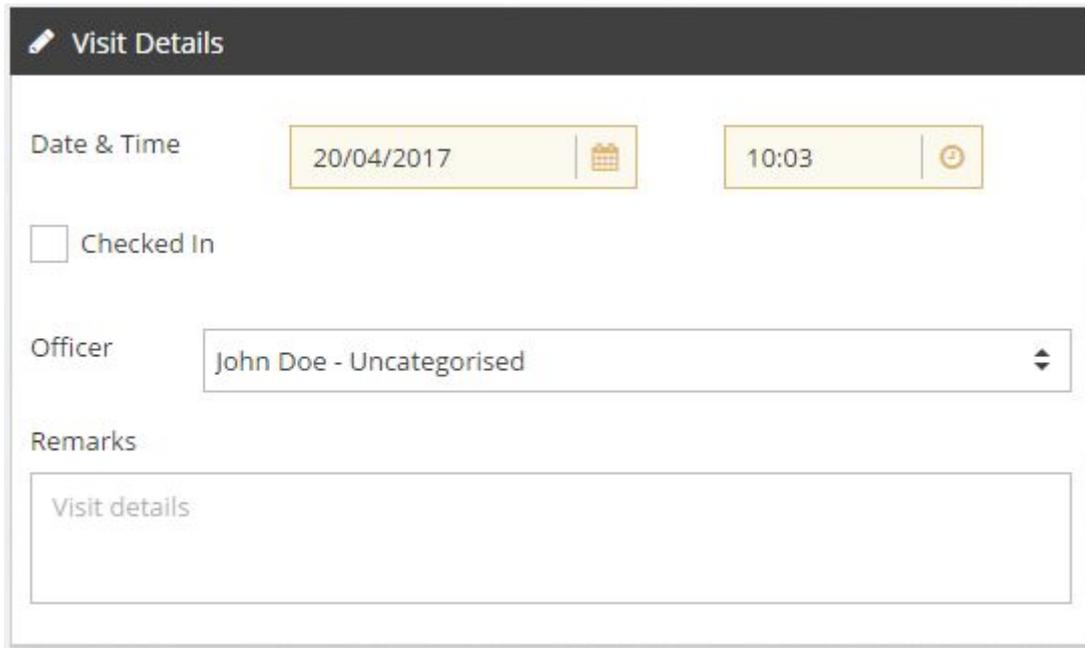


Figure 9 - "Visit Details" widget

Visitor Details

The only required fields are **Name, Surname** and **Nationality** of the visitor. The rest of the fields can be left empty however it is not recommended.

The last two fields are to specify the company of the visitor and the tag that is going to be assigned. If visitors present themselves without appointment or without company, the "company" option should be set as **Walk-In**.

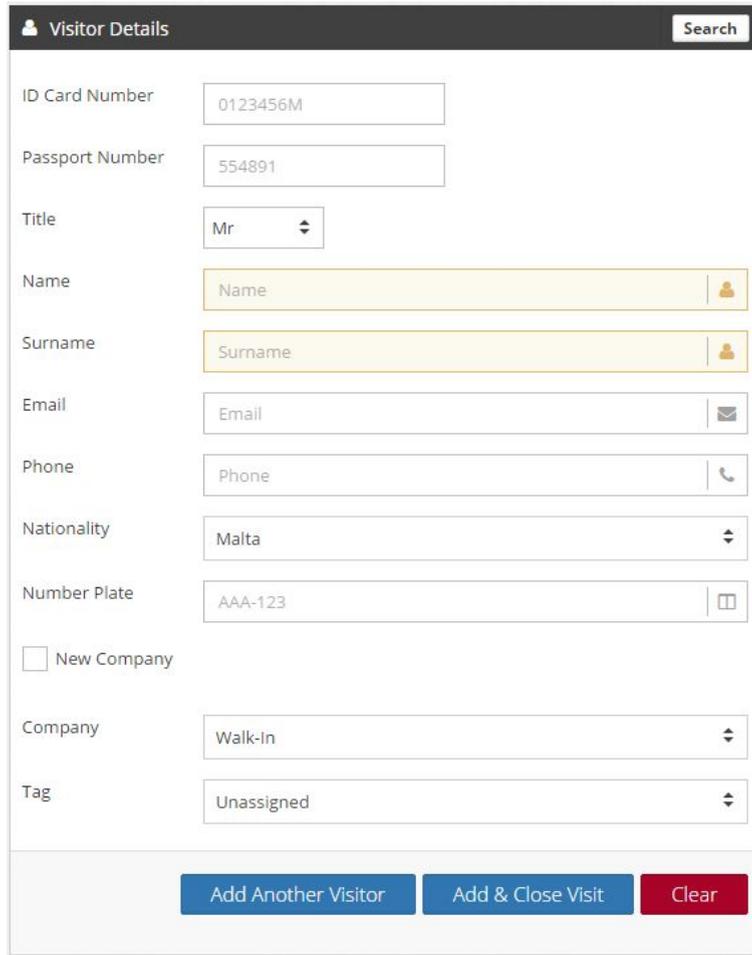


Figure 10 "Visitor Details" widget

Searching for existing visitors

When visitors are added either from the "Add Visit" page or from the "Visitors" set-up page (see section Visitors), they are saved in the system and therefore a search can be performed to retrieve details of a specific visitor.

Visitors are searched by ID Card Number in the "Visitor Details" field when typing in the text box, retrieving real-time results of what is being typed.

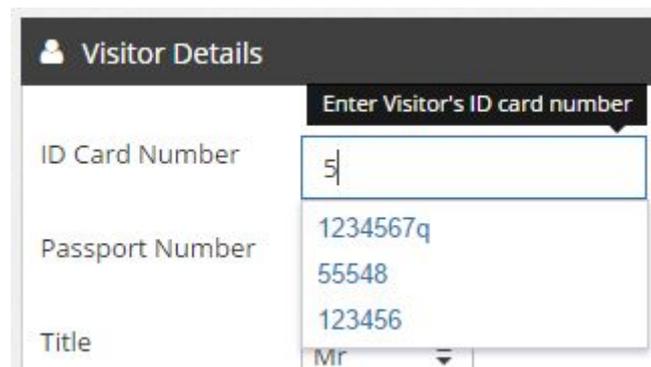


Figure 11 - Searching for existing visitors by typing the ID Card Number value

Editing a Visit

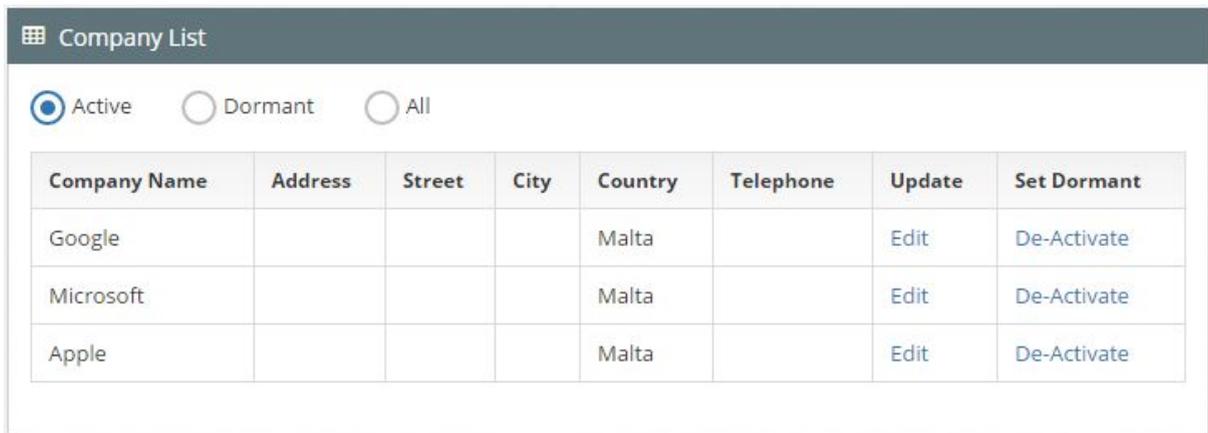
An existing visit can be edited by clicking the "edit visit/visitor" button under the "Actions" heading in the list of visits. This will take you to the visit page with pre-filled values of the existing visit, including all visitors that are grouped to the selected visit.

Any visit details changed will apply to all visitors.

Managing Companies

Companies should be created to be linked with visitors when creating a new visit. A new company name can be created directly from the “Add Visit” page when adding a new visit, however the “Setup Visitor Companies” page allows you to specify further details of a company.

To create and update the list of companies, navigate to **Setup > Visitor Companies** from the side menu. This page will display a form to specify the details of a new company and save it by clicking on the “Add button”. At the bottom is the “Company List” widget that displays all active and dormant (inactive) companies.



The screenshot shows a 'Company List' widget with a filter section and a table of active companies. The filter section has three radio buttons: 'Active' (selected), 'Dormant', and 'All'. The table has the following data:

Company Name	Address	Street	City	Country	Telephone	Update	Set Dormant
Google				Malta		Edit	De-Activate
Microsoft				Malta		Edit	De-Activate
Apple				Malta		Edit	De-Activate

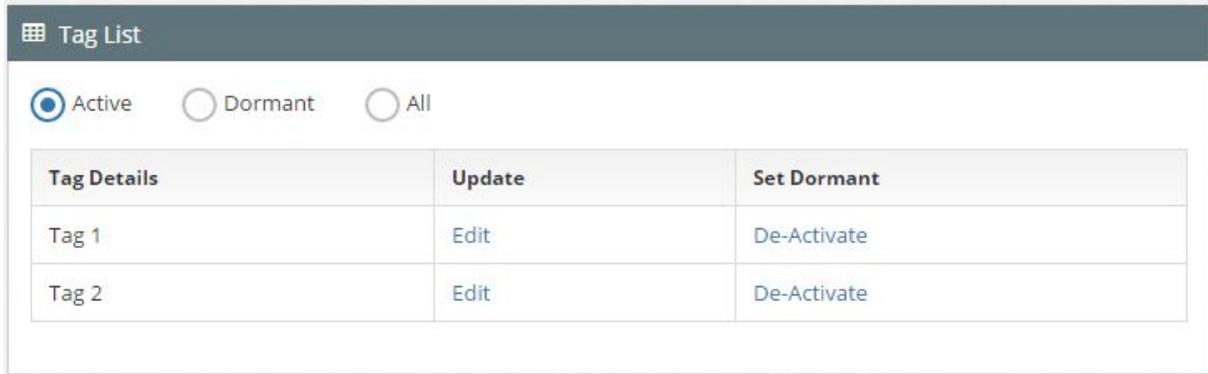
Figure 14 - List of active companies

Active companies can be de-activated to be set as dormant, and dormant companies can be re-enabled. To edit an existing company from the list, click on the “Edit” link, change the values of the company in the top widget and click “update” to finish.

Managing Tags

The system can hold a list of pre-defined tags that can be assigned to visitors when checking-in. To create these tags, navigate to **Setup > Tags** from the side menu to open the tags setup page.

Tag names can be added by writing into the text box and pressing the “Add” button to save. The “Tag List” widget at the bottom will display all available and dormant tags.



Tag Details	Update	Set Dormant
Tag 1	Edit	De-Activate
Tag 2	Edit	De-Activate

Figure 15 - "Tag List" widget showing all active tags

Active tags can be de-activated to be set to dormant, and dormant tags can be re-enabled. To edit an existing tag from the list, click on the “Edit” link, change the text in box at the top widget and click “update” when finished.

Managing Visitors

As section *Adding a Visit* explains, a visitor can be added from the “Add Visit” page when creating a new visit. When a new visitor is created, it is then saved in the system and can be added to future visits by using the search functionalities. The “Manage Visitors” gives the ability to update these visitors and create additional pre-defined visitors. To manage Visitors, go to **Setup > Visitors**.

The top widget “Add Visitor” is used to create / update visitors. Fill in at least the required fields (in yellow) and click the “Add” button to create a visitor. This visitor will now be available when searching in the “Add Visit” page (see section *Searching for existing visitors*).



The screenshot shows the "Add Visitor" form with the following fields and values:

Title	Name	Surname	ID Card Number
N/A	Visitor's Name	Visitor's Surname	0123456M
Passport Number	Email Address	Personal Phone	Nationality
554891	Visitor's Email	Visitor's Phone	Malta
Company	<input type="checkbox"/> Deny Entry		
Walk-In			

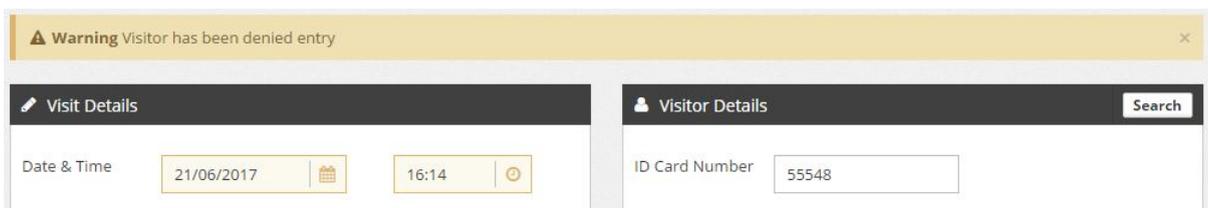
Buttons: + Add, Clear

Figure 16 - "Add Visitor" form

The “Visitor List” at the bottom shows all the saved visitors. To update any of the visitors, click on the “Edit” link and change the values in the top widget. Click the “Update” button to save your changes.

Deny visitor entry

A visitor can be flagged to be denied entry. When trying to add visitors with this flag to a visit, the user will be warned with a message. The visitor can still be added to the visit by the user’s choice after the warning.



The screenshot shows a warning message at the top: "Warning Visitor has been denied entry". Below the warning, there are two panels:

- Visit Details:** Date & Time: 21/06/2017, 16:14
- Visitor Details:** ID Card Number: 55548

Figure 17 - Showing a warning to the user when adding a visitor that has been denied entry

Reports

DataByte Visitors offers the following set of reports:

Complete Report

The complete report gives an overview of all visits from a start date to an end date, showing the actual state of all visits.

Tag Report

The tag report shows which tags are still inside the building and to whom they are assigned.

Emergency Report

The emergency report is a quick report that displays which visitor is still inside the premises.

Automatic Visit Anonymisation

DataByte Visitors offers a tool to automatically anonymise visits that are older than a specified number of days. Specifically, it will hide all Visitor data (*First name, Last name, Title, ID card, Passport, Email, Phone, Number Plate and Country*) from the targeted visits, making them irreversibly anonymous after they are processed. The visit entries would still show general details such as the date, time and total number of visitors.

To enable this feature, navigate to Fusion Dashboard from the Product Switcher and open the 'Settings' page. Under the 'Visitors Settings' tab you can find an option 'Anonymise Old Visit Data'. Select this option and specify the desired number of days.



Anonymise Old Visit Data

Older than the following days:

30

Last successful run: 8/7/2017

Figure 18 - Enabling Visit Anonymisation option

When enabled, a background process will run once every day which will iterate through old visits and remove the Visitors' details.