ecoPortal

Health and Safety Engagement Software.

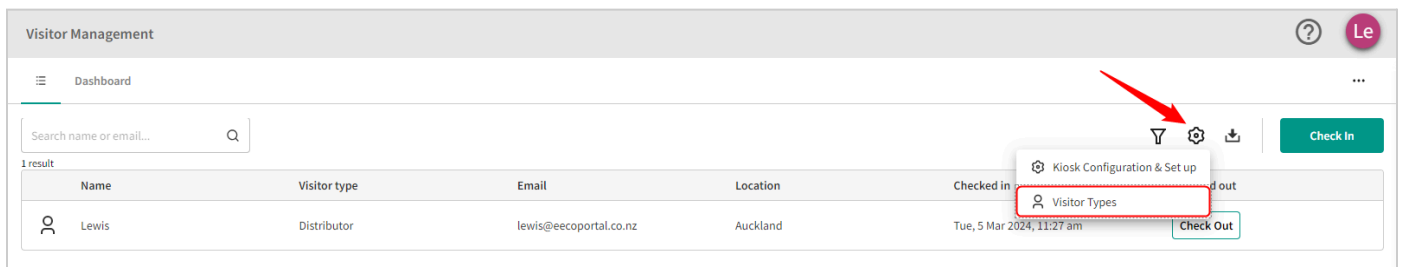# Visitor Management

User Guide - Dynamic Visitor Types

Introduction

This guide introduces the new, dynamic Visitor Types feature in our Visitor Management (VM) module. It will step you through how to navigate the changes that come with this release, as well as create and configure your Visitor Types. Read on to learn how you can tailor your visitor check-in experience to meet all types of visitors' needs (not just those of visitors and contractors).

Visitor Type Creation & Configuration

The management of Visitor Types begins with the main screen of the Visitor Management module, where you'll see a settings button allowing you to access Kiosk Configuration, and the Visitor Types configuration drawer. You can also manage Visitor Types from directly within a kiosk, which will be outlined later under Using Visitor Types in Kiosks.

1. Begin by selecting the 'cog' menu from the main Visitor Management screen and selecting Visitor Types.
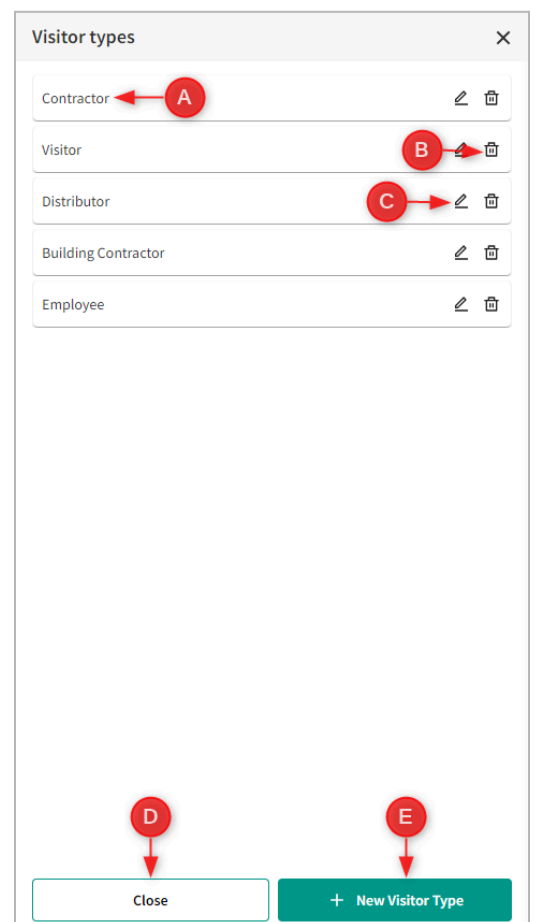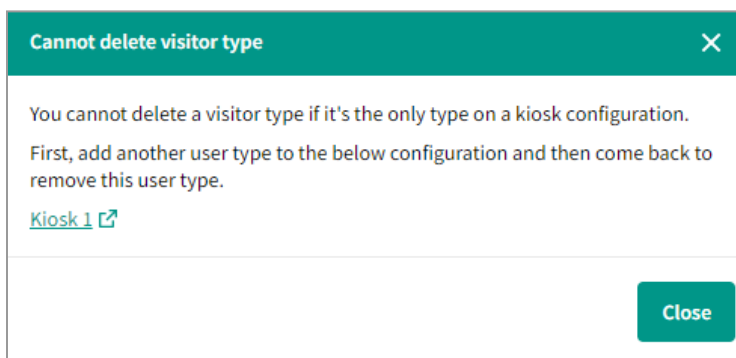
2. This will open the Visitor Types drawer. From here, you can create, edit, and configure Visitor Types for your organisation. Compare the below labels to the image for the different functions of this drawer.

    A. **Visitor Type Name**

    B. **Delete Visitor Type**

    C. **Edit Visitor Type**

    D. **Close the Visitor Types drawer**

    E. **Create New Visitor Type**

3. All organisations will begin with the 'Contractor' and 'Visitor' types by default. You can edit or delete these according to your visitor requirements.

4. **B. Delete Visitor Type** will present you with a warning modal, and if you have any kiosks with the Visitor Type selected, it will inform you of impacted kiosks. If a kiosk exists with only 1 Visitor Type assigned to it, you'll be presented with the below error.

5. **C. Edit Visitor Type** will take you to the Edit Visitor Type screen of the drawer *(see image below).* This is where you'll find your 'Visitor fields' (these were previously called 'Personal details fields' and were located in the kiosk configuration). You can add and edit fields here, which will then flow through to the Visitor Type's assigned kiosks (see Using Visitor Types in Kiosks for more information).

   If you add a host field to a visitor type, you'll need to configure host settings here (this includes 'Notify host', and 'Allow multiple hosts' options).

   The required status of fields will also need to be maintained from this menu. However, if you don't require all fields for a particular kiosk, you can choose to hide them from within the Kiosk Configuration.

6. **E. Create New Visitor Type** lets you create a new custom Visitor Type from a blank slate (instead of editing an existing one). There is no limit to the number of new Visitor Types you can create.

   Once you've created some Visitor Types, and edited the existing ones to your liking, you can move over to Kiosk Configuration and start assigning them to your Kiosks!
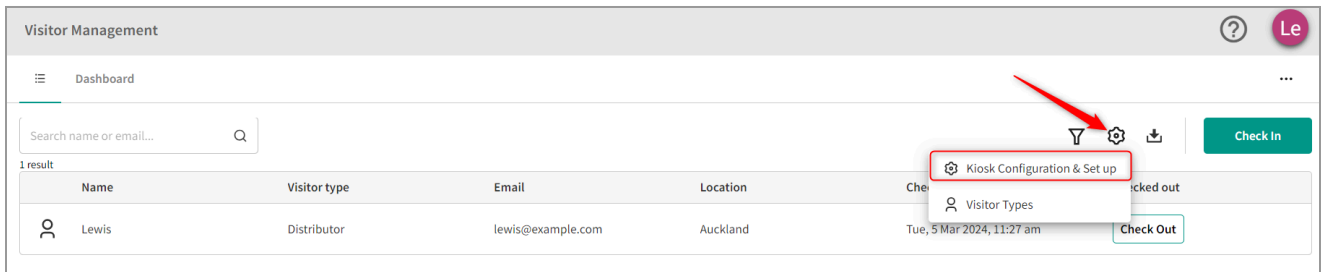
Using Visitor Types in Kiosks

Assigning Visitor Types

1. Once you have some Visitor Types created, go back to the main screen of the Visitor Management module and again use the cog menu to select Kiosk Configuration & Set Up.

2. From the Kiosk Configuration & Set-up screen, open up one of your existing Kiosks or create a new one.
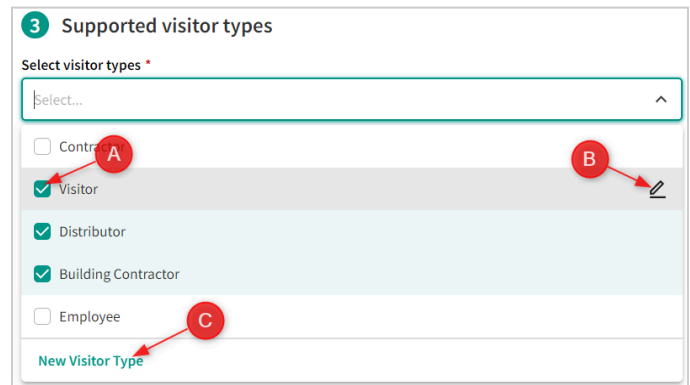
3. Once you're on the Kiosk screen, you should immediately see the drop-down menu titled "Select visitor types". You can use this to select Visitor Types for the specific kiosk you're configuring. You can also use it to quickly edit or create new Visitor Types.

   A. **Select Visitor Type**
   B. **Edit Visitor Type**
   C. **Create New Visitor Type**

Note: Both **B. Edit Visitor Type** and **C. Create New Visitor Type** will open the Visitor Types drawer we discussed in the [Creation & Configuration](#) section of this guide. Any changes made here will impact all kiosks that the Visitor Type is selected for (not just the kiosk you are configuring).

4. Once you've assigned your chosen Visitor Types for the kiosk, they'll appear below the selection menu in **an order matching how they'll appear during the check-in process**. You can reorder your Visitor Types using the click & drag button *(see image below)*.

   A. **Click & drag list item**
   B. **Unassign from kiosk**
   C. **Edit field visibility**

5. **A. Click & drag list item** lets you click and drag your Visitor Types into the order you want them to appear on your kiosk.
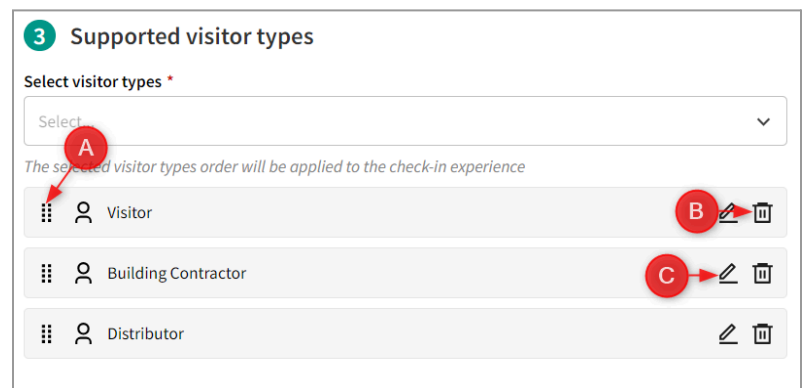
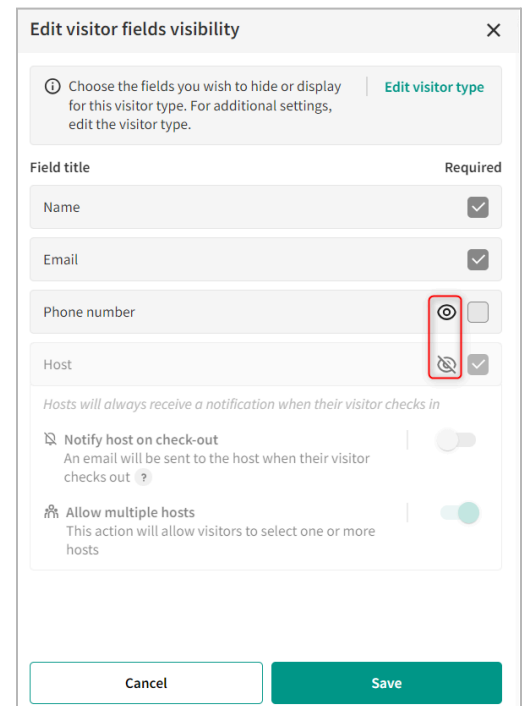6. **B. Unassign from kiosk** lets you remove the Visitor Type from the kiosk.

7. **C. Edit fields assigned to a kiosk** will open a drawer (*see image to right*) which looks very similar to the edit Visitor Type drawer, but with limited functionality. Here you can choose to show or hide fields for the kiosk by clicking the ⊚ icon. A hidden field is indicated by the ⊘ icon, and won't appear for the selected visitor type when checking into the kiosk you're editing. **Name** and **Email** can't be hidden, as they're required for all check-ins.

Note: If you hide a required field in a kiosk it will no longer be required as it won't appear during check-in.

Note: Mobile applications which are earlier than version 1.2.8.0 will not be able to check into a kiosk that does not contain at least one "Visitor" or "Contractor".

Visitor Requirements & Register Information

Dynamic Visitor Types gives you the ability to set requirements for all types of visitors (not just contractors).
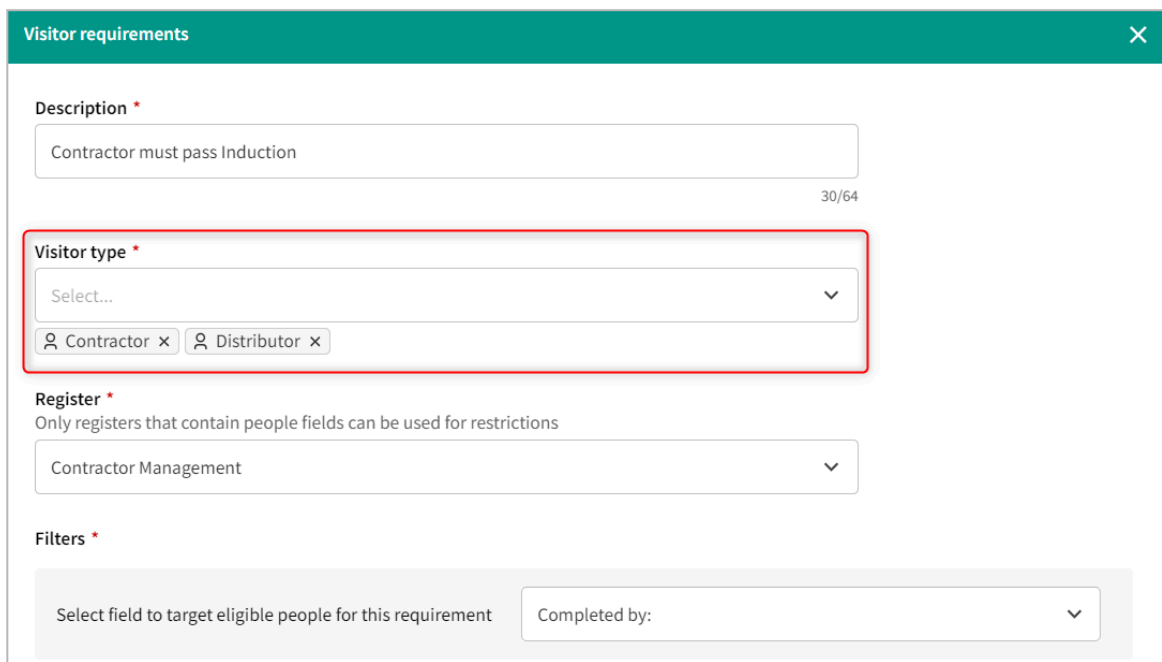
Visitor Requirements

Visitor Requirements (which were previously called 'Contractor Requirements' and were located in kiosk configuration) allows you to create requirements your visitors must meet, and assign those requirements to any number of your Visitor Types.

1. You can assign visitor types to a requirement by choosing to edit an existing requirement or adding a new one. Then, select any number of visitor types from the "Visitor Type" drop-down menu (*see image below*).
2. Already selected Visitor Types appear below the drop-down menu as indicators, and can be unassigned to the requirement by hitting the X on the indicator, or via the drop-down menu.

Note: A single visitor type can be assigned to multiple requirements, and all of these requirements will need to be passed for them to check in successfully.
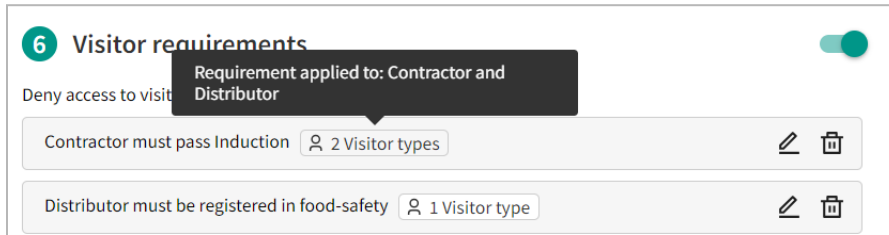
3. Using Visitor Requirements with dynamic Visitor Types lets you assign different requirements for different visitors based on their needs.
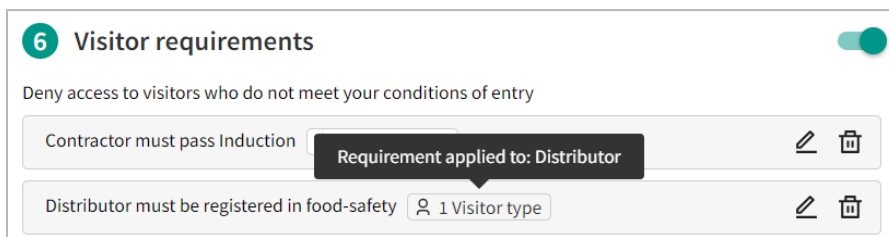
Hover over the "# Visitor Types" indicator to see which Visitor Types have been assigned to a specific requirement. In the below examples: Contractor and Distributor are both assigned to the "Contractor must pass Induction" requirement, but only Distributor is assigned to the "Distributor must be registered in food-safety" requirement.

If you have ecoPortal's Contractor Management Module you can also select specific visitor types to be targeted by the rule "Only approved contractors in Contractor Manager" can check in (*see image to right*).
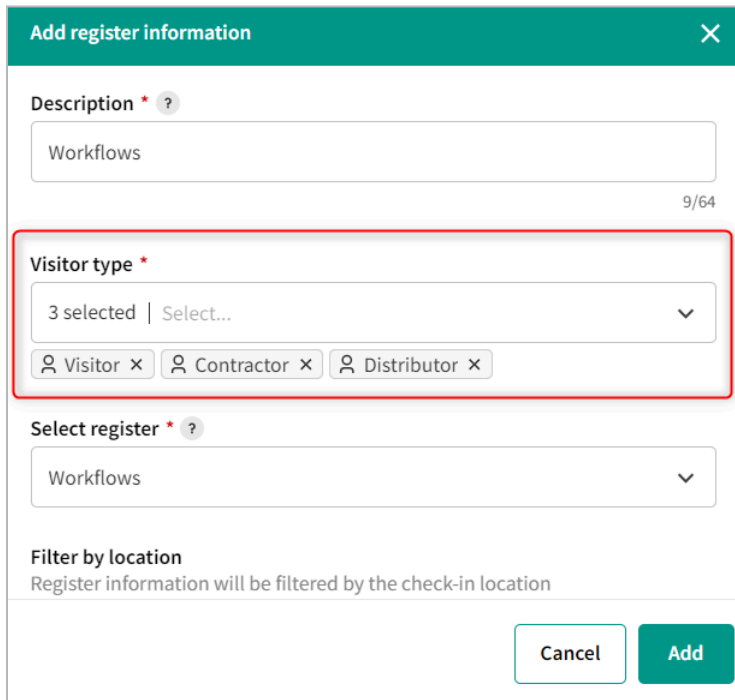
Register Information

Dynamic Visitor Types lets you also assign Register Information to specific Visitor Types, and therefore share only the information that's relevant to them.

You can now choose to share information from multiple registers and assign it to be shared with any number of Visitor Types. If one Visitor Type is assigned to multiple Register Information nodes, information from each of those registers will appear for them during the check-in process.

1. To assign Visitor Types to a Register Information node, choose to 'Add register information', or edit an existing one. You can then open the Visitor type drop-down menu and select your required Visitor Types.

2. Hover over the "# Visitor Types" indicator to see which types have been assigned to a specific register. In the below examples, Visitor, Contractor and Distributor are all assigned to "Workflows" but only Contractor is assigned to "Contractor Information".

3. If you need your visitors to acknowledge they've seen the registers, you can check the 'Register Information requires user acknowledgement checkbox'. A single acknowledgement will apply to all registers shown during a visitor's check-in.

Checking-in

Now that you've got your Visitor Types created, and your Kiosk has all the necessary types assigned to it, your visitors can open up the kiosk and select a Visitor Type. When they select any of the types assigned to the kiosk, they'll be presented with its description to ensure they're making the right selection. After that, all that's left is to check in!