



Visitor Management

User Guide - Dynamic Visitor Types





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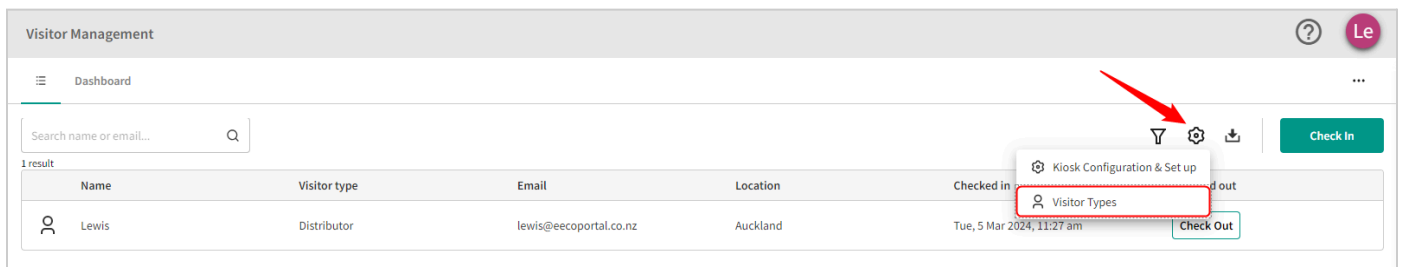
Introduction

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.



The screenshot shows the 'Visitor Management' dashboard. At the top right, there is a settings gear icon. A red arrow points to this icon, which has opened a dropdown menu. The menu contains two options: 'Kiosk Configuration & Set up' and 'Visitor Types'. The 'Visitor Types' option is highlighted with a red box. Below the menu, a table displays visitor information for a user named Lewis, with columns for Name, Visitor type, Email, Location, Checked in, and Checked out.

Name	Visitor type	Email	Location	Checked in	Checked out
Lewis	Distributor	lewis@ecportal.co.nz	Auckland	Tue, 5 Mar 2024, 11:27 am	



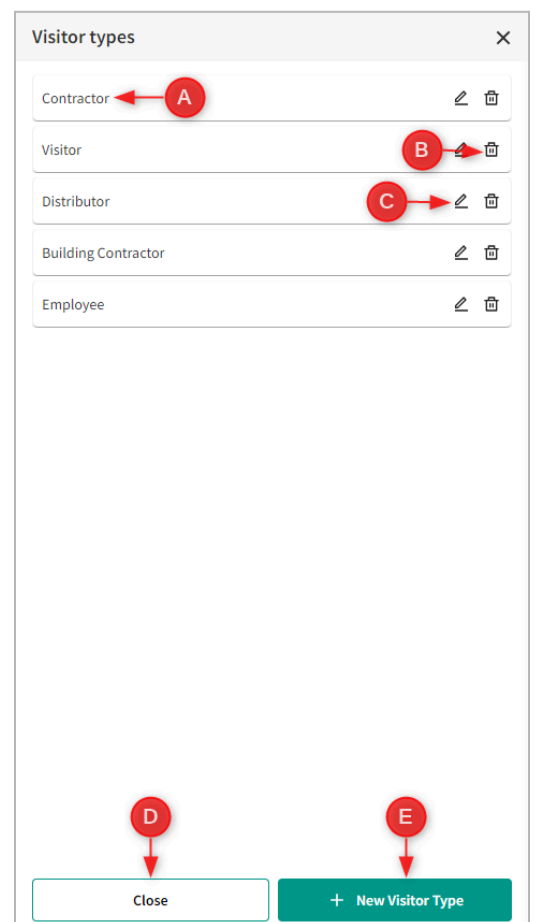
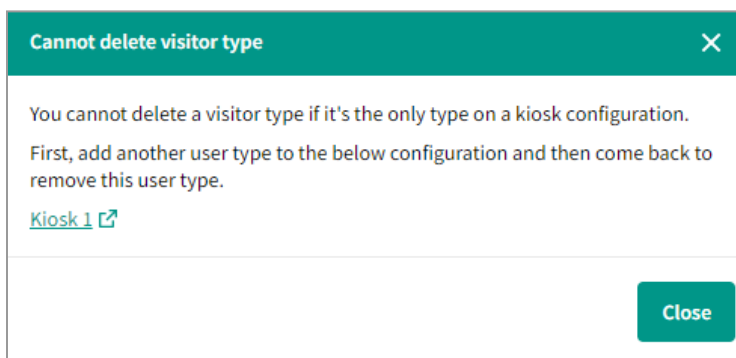
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- This will open the Visitor Types drawer. From here, you can create, edit, and configure Visitor Types for your organisation. Compare the below labels to the image for the different functions of this drawer.

- A. Visitor Type Name
- B. Delete Visitor Type
- C. Edit Visitor Type
- D. Close the Visitor Types drawer
- E. Create New Visitor Type

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





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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!

Edit visitor type

Visitor type name *
Visitor

Description
Visitor

Visitor fields
Select the fields for your check-in experience

Field title	Required
Name	<input checked="" type="checkbox"/>
Email	<input checked="" type="checkbox"/>
Phone number	<input type="checkbox"/>
Host	<input type="checkbox"/>

Hosts will always receive a notification when their visitor checks in

Notify host
An email will be sent to the host when their visitor checks out ?

Allow multiple hosts
This action will allow visitors to select one or more hosts

Add Field

Cancel Save



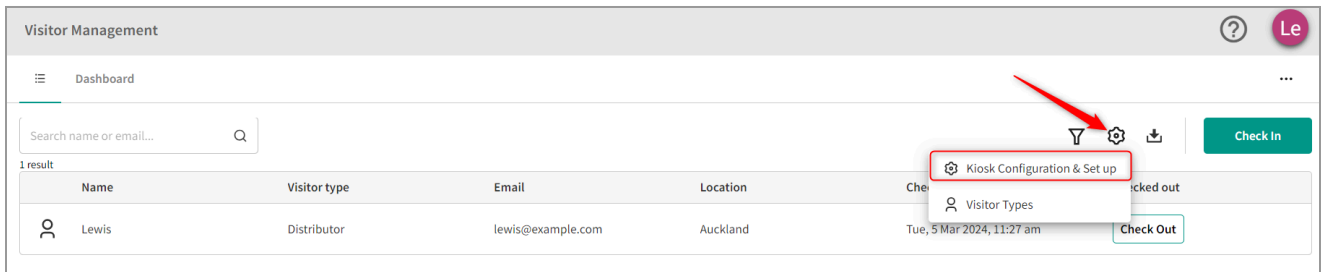
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Using Visitor Types in Kiosks

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.



The screenshot shows the 'Visitor Management' dashboard. At the top, there is a search bar and a 'Check In' button. Below the search bar, a table displays one visitor record:

Name	Visitor type	Email	Location	Checked in	Checked out
Lewis	Distributor	lewis@example.com	Auckland	Tue, 5 Mar 2024, 11:27 am	

On the right side of the table, there is a cogwheel icon (settings menu) which is highlighted with a red box and a red arrow. The dropdown menu is open, showing 'Kiosk Configuration & Set up' as the selected option. Other options in the menu include 'Visitor Types' and 'Check Out'.

2. From the Kiosk Configuration & Set-up screen, open up one of your existing Kiosks or create a new one.

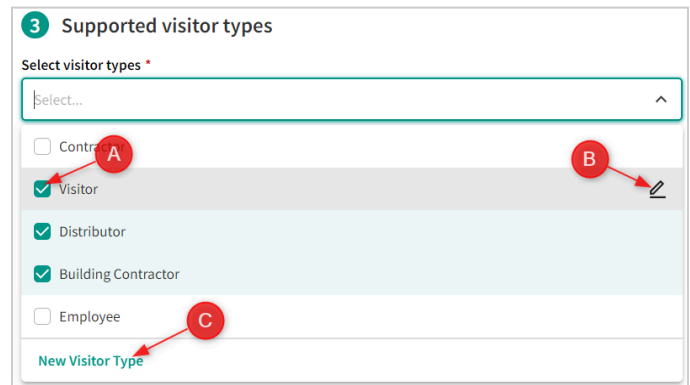


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- Once you're on the Kiosk screen, you should immediately see the drop-down menu titled "Select visitor types". You can use this to select Visitor Types for the specific kiosk you're configuring. You can also use it to quickly edit or create new Visitor Types.

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

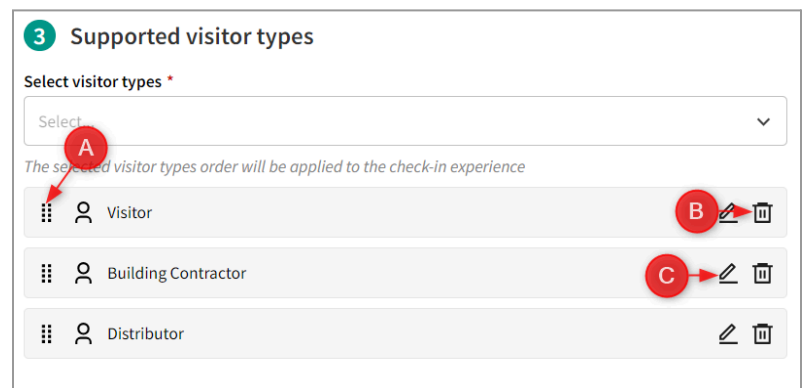


Note: Both **B. Edit Visitor Type** and **C. Create New Visitor Type** will open the Visitor Types drawer we discussed in the [Creation & Configuration](#) section of this guide. Any changes made here will impact all kiosks that the Visitor Type is selected for (not just the kiosk you are configuring).

- 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

- A. Click & drag list item** lets you click and drag your Visitor Types into the order you want them to appear on your kiosk.





- B. Unassign from kiosk** lets you remove the Visitor Type from the kiosk.

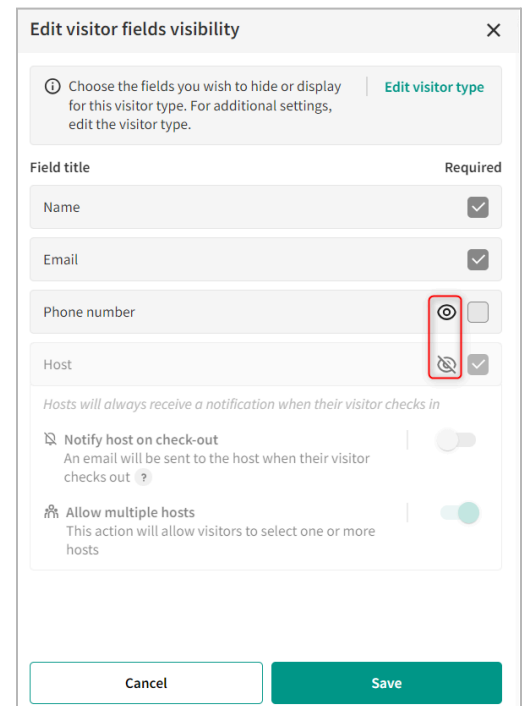


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7. **C. Edit fields assigned to a kiosk** will open a drawer (see image to right) which looks very similar to the edit Visitor Type drawer, but with limited functionality. Here you can choose to show or hide fields for the kiosk by clicking the  icon. 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.



Edit visitor fields visibility [X]

Choose the fields you wish to hide or display for this visitor type. For additional settings, edit the visitor type. [Edit visitor type](#)

Field title	Required	Visible
Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Phone number	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Host	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Hosts will always receive a notification when their visitor checks in

Notify host on check-out
An email will be sent to the host when their visitor checks out ?

Allow multiple hosts
This action will allow visitors to select one or more hosts

Cancel Save

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

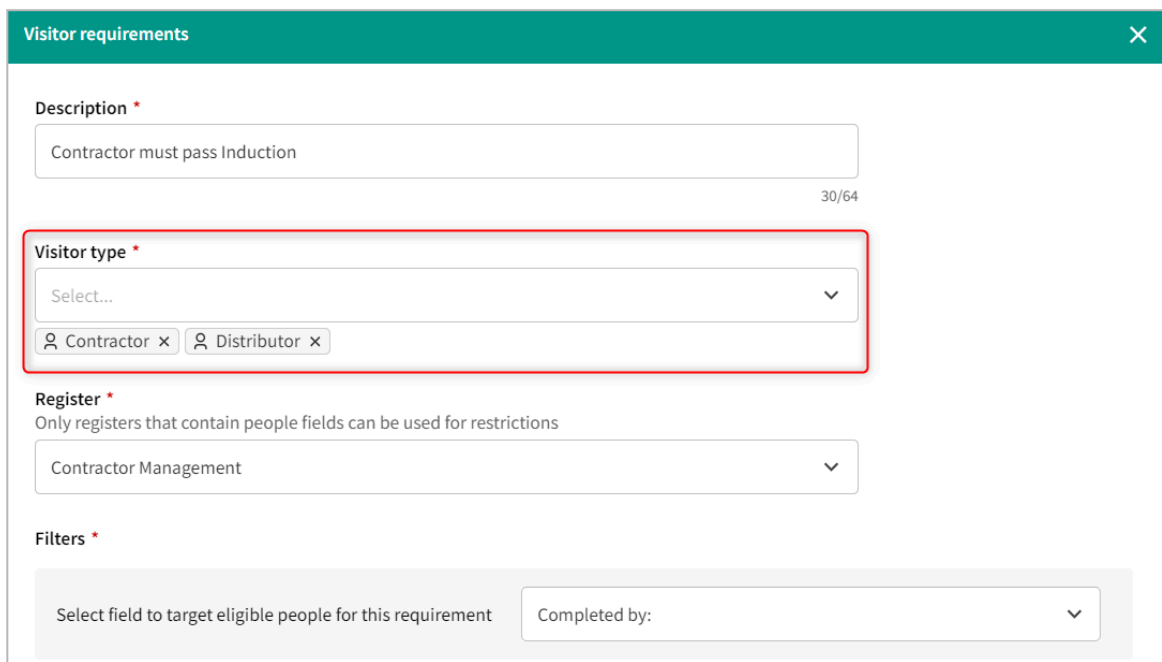
Visitor Requirements (which were previously called 'Contractor Requirements' and were located in kiosk configuration) allows you to create requirements your visitors must meet, and assign those requirements to any number of your Visitor Types.



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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.



Visitor requirements ✕

Description *
Contractor must pass Induction 30/64

Visitor type *
Select... ▼
👤 Contractor ✕ 👤 Distributor ✕

Register *
Only registers that contain people fields can be used for restrictions
Contractor Management ▼

Filters *
Select field to target eligible people for this requirement Completed by: ▼

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.

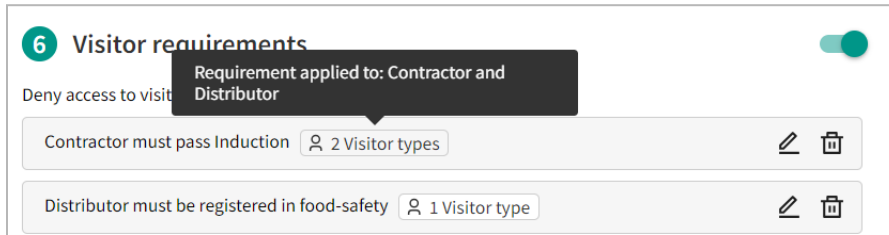


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- Using Visitor Requirements with dynamic Visitor Types lets you assign different requirements for different visitors based on their needs.

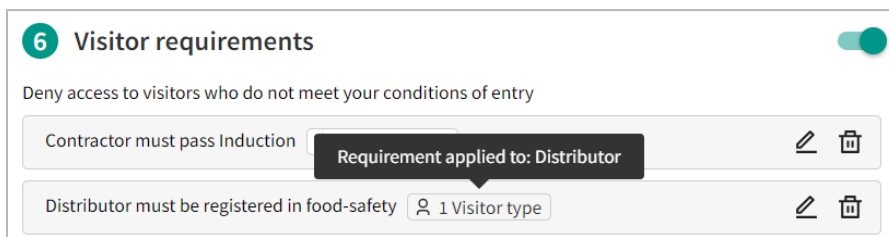
Hover over the “# Visitor Types” indicator to see which Visitor Types have been assigned to a specific requirement. In the below examples: Contractor and Distributor are both assigned to the “Contractor must pass Induction” requirement, but only Distributor is assigned to the “Distributor must be registered in food-safety” requirement.



6 Visitor requirements [Toggle]

Deny access to visitors who do not meet your conditions of entry

- Contractor must pass Induction 2 Visitor types [Edit] [Delete]
- Distributor must be registered in food-safety 1 Visitor type [Edit] [Delete]

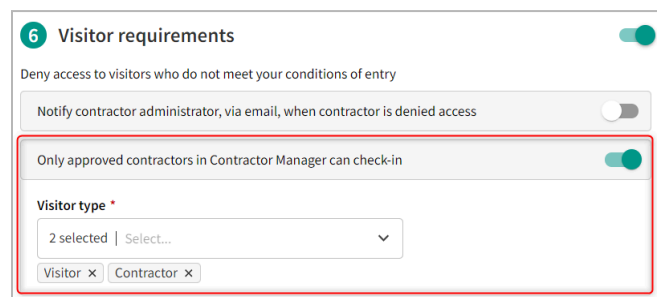


6 Visitor requirements [Toggle]

Deny access to visitors who do not meet your conditions of entry

- Contractor must pass Induction Requirement applied to: Distributor [Edit] [Delete]
- Distributor must be registered in food-safety 1 Visitor type [Edit] [Delete]

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).



6 Visitor requirements [Toggle]

Deny access to visitors who do not meet your conditions of entry

- Notify contractor administrator, via email, when contractor is denied access [Toggle]
- Only approved contractors in Contractor Manager can check-in [Toggle]

Visitor type *

2 selected | Select... [Dropdown]

Visitor x | Contractor x



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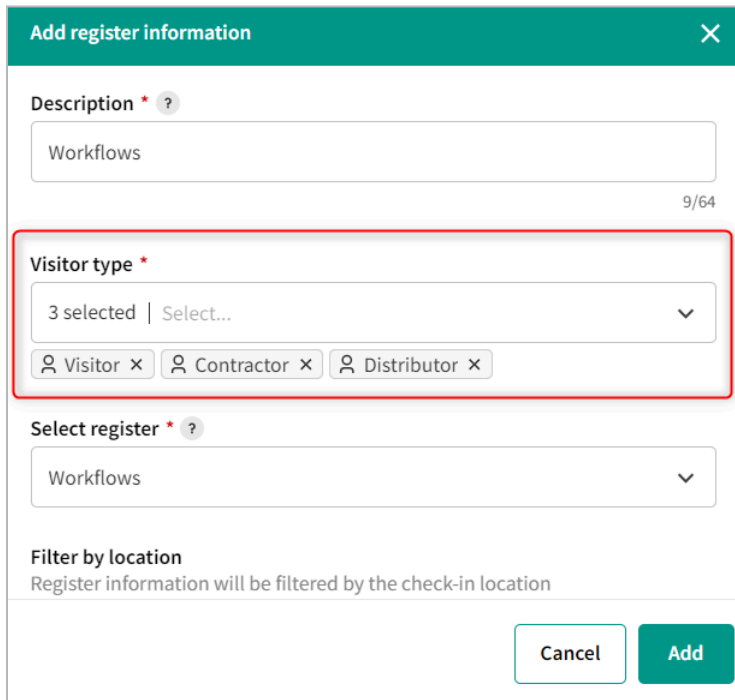


Register Information

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.



Add register information [X]

Description * ?
Workflows
9/64

Visitor type *
3 selected | Select...
Visitor x Contractor x Distributor x

Select register * ?
Workflows

Filter by location
Register information will be filtered by the check-in location

Cancel Add



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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”.

7 Add register information 🔴

Display register information to your visitors during the check-in experience

Visitor, Contractor, and Distributor

Workflows 👤 3 selected ✎ 🗑

Contractor Information 👤 1 selected ✎ 🗑

Register information requires user acknowledgement ?

7 Add register information 🔴

Display register information to your visitors during the check-in experience

Workflows 👤 3 selected ✎ 🗑

Contractor

Contractor Information 👤 1 selected ✎ 🗑

Register information requires user acknowledgement ?

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.



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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!

1/3: Visitor type selection

Select your role for the visit


Visitor

Contractor
An external contractor not employed by the company.

Merchandiser

Employee

Next

 ecoPortal