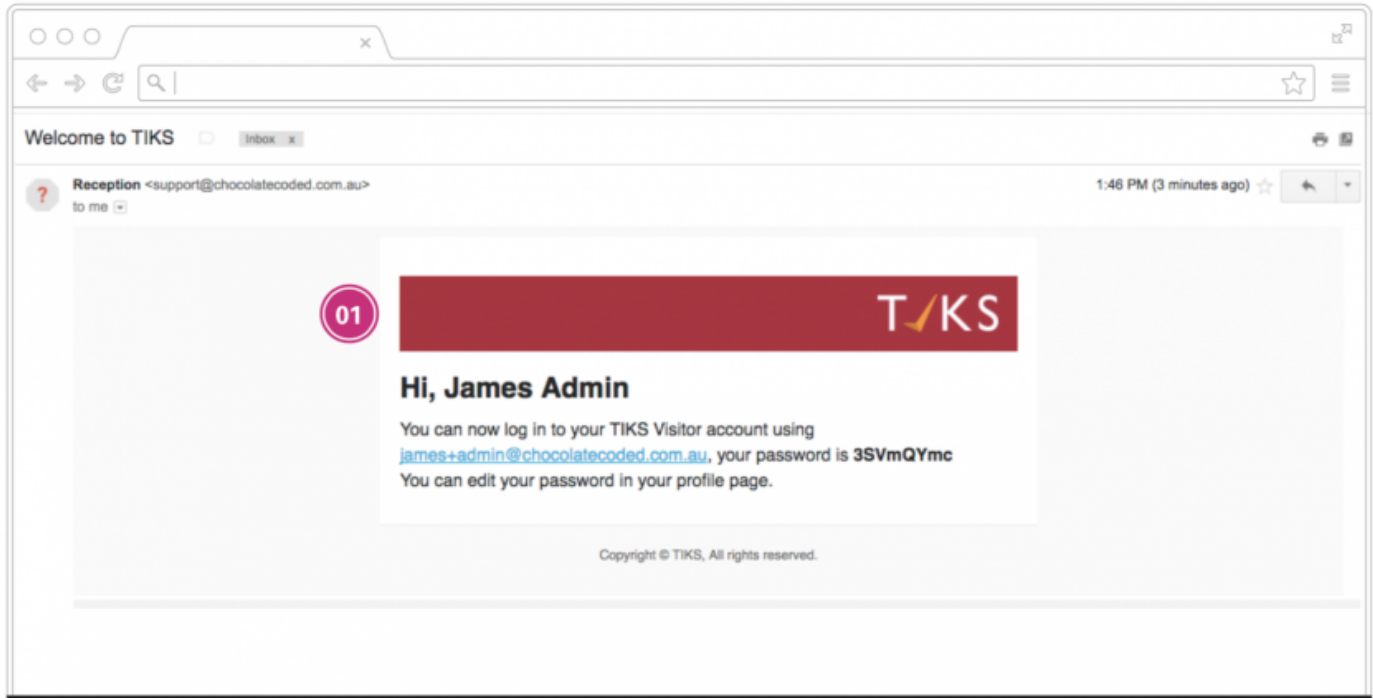# TIKS Visitor Management - User Guide

- Getting Set-Up

# Getting Set-Up

Getting Set-Up

Getting set up as an Administrator

1. You will receive an email with login instructions for TIKS Visitor admin.
2. You can log into the TIKS VMS admin portal using the URL provided by your account manager ie: https://company.visitor.tiks. com.au/dashboard
3. By using the credentials that will have been sent out to you via email (example shown above). In order to login, simply type your email into the first field, and your password into the password field, and select the 'log in' button.
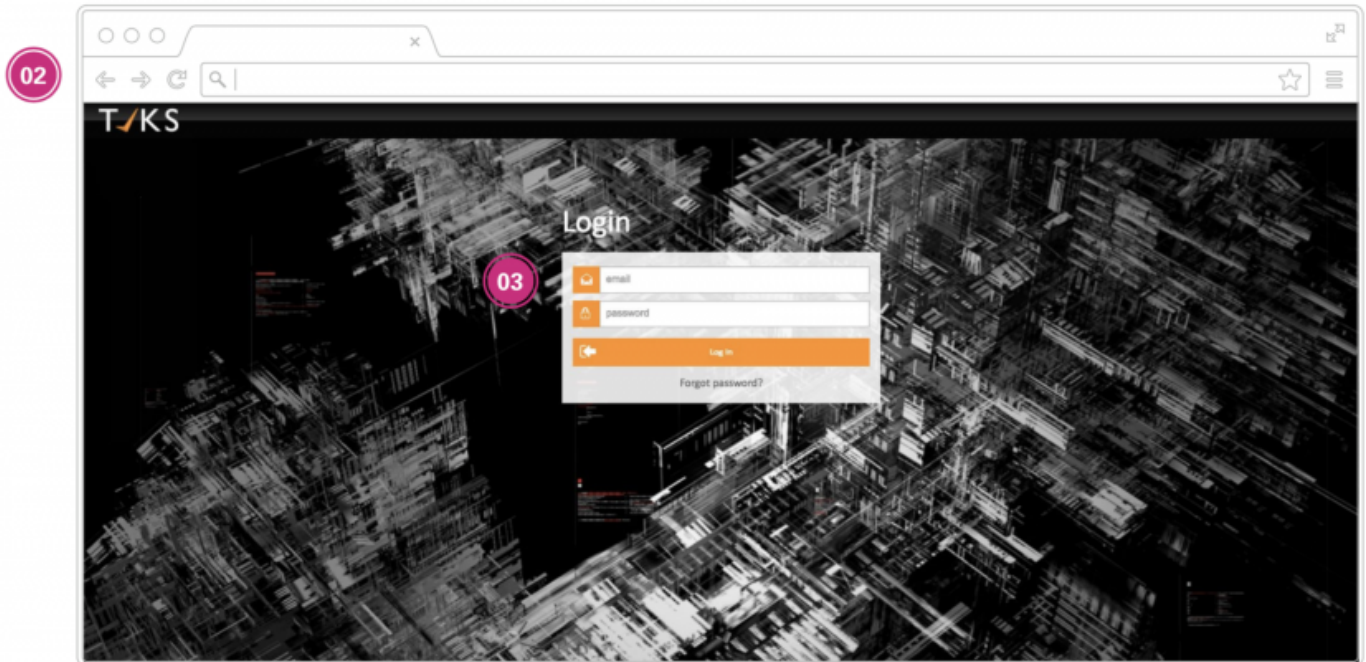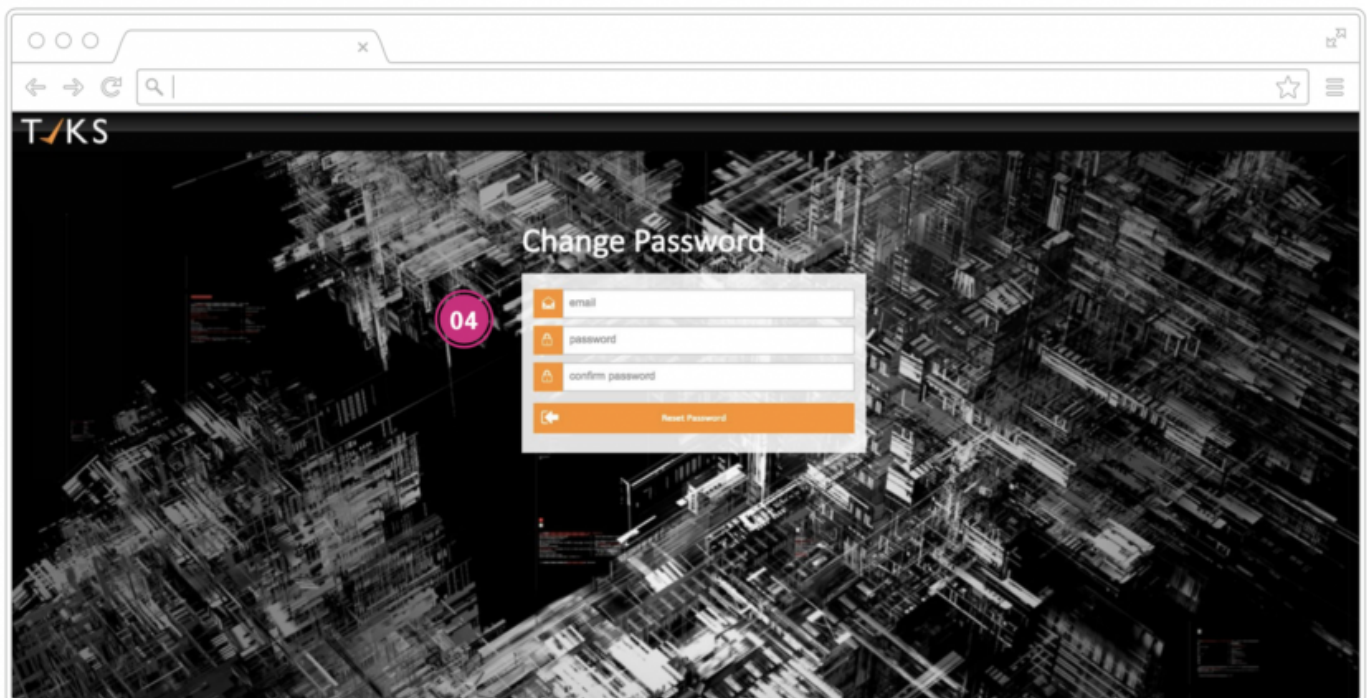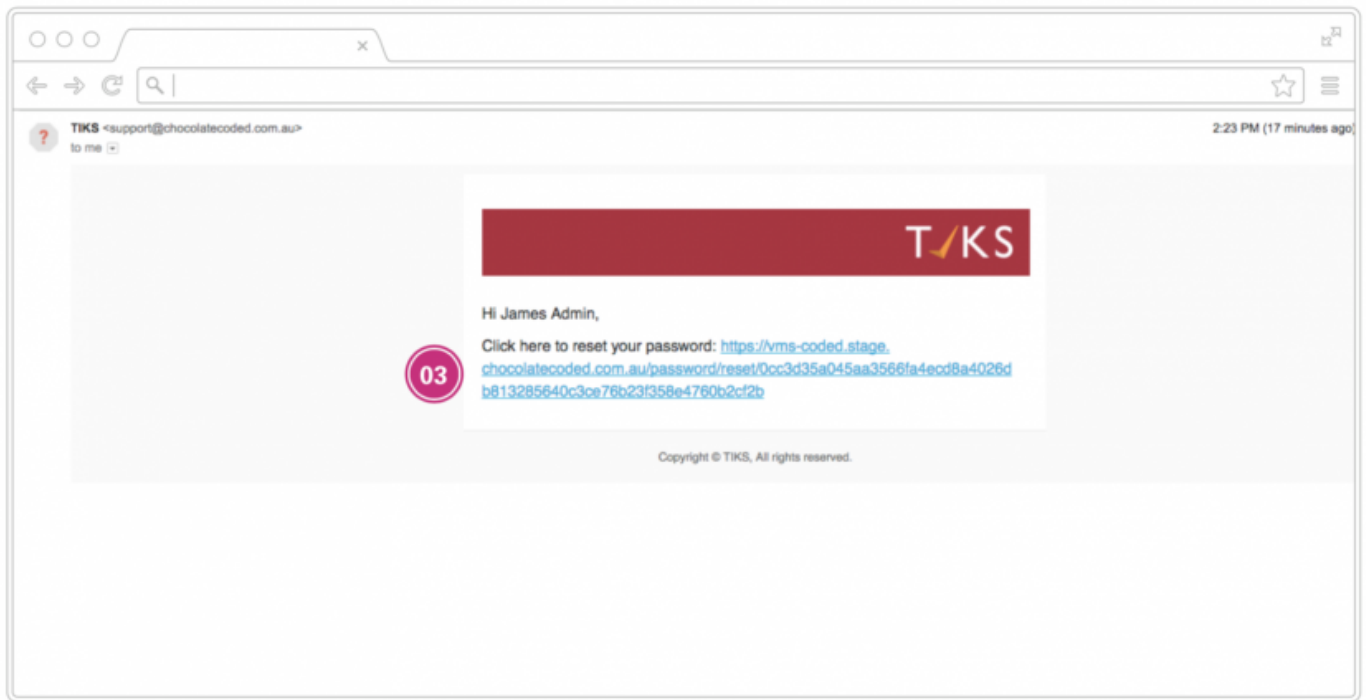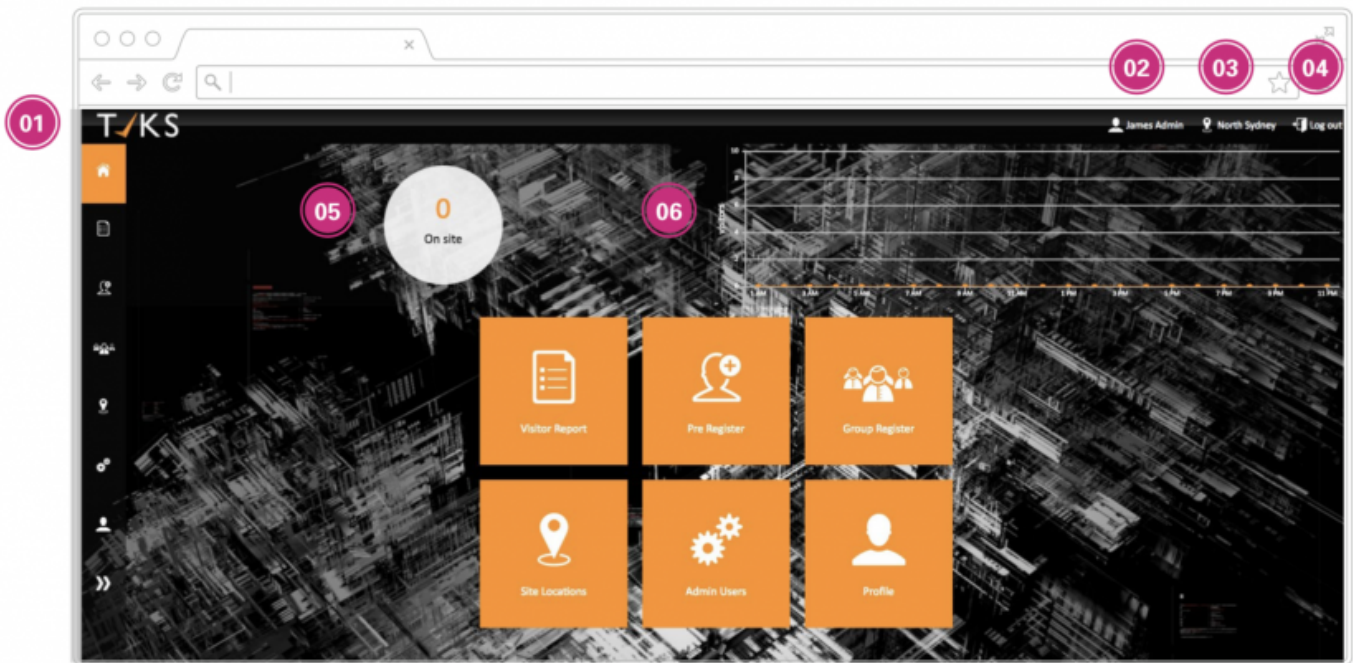
Forgot Password

1. If you have forgotten your password, simply select 'forgot password' underneath the coloured 'log in' button.
2. Re-type your email linked to your TIKS VMS admin portal account. Once you have done this, select the coloured 'send password' button, this will re-send you an email with instructions to reset your password
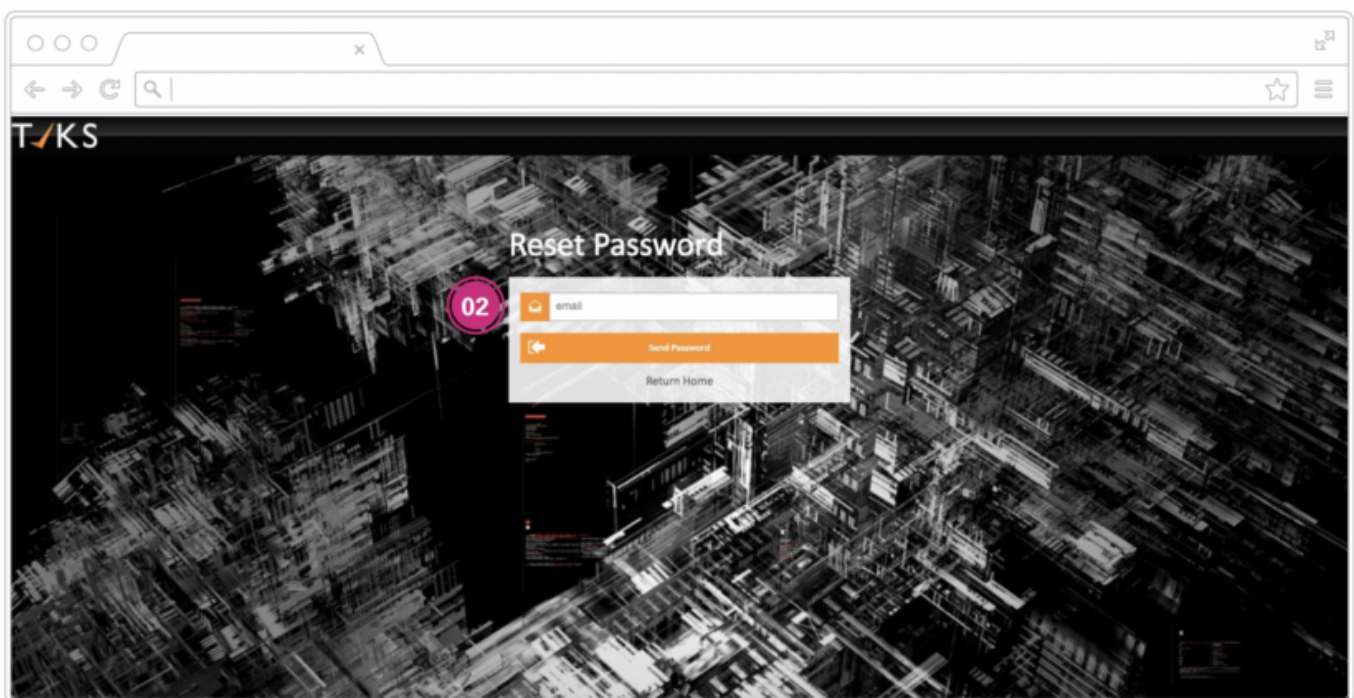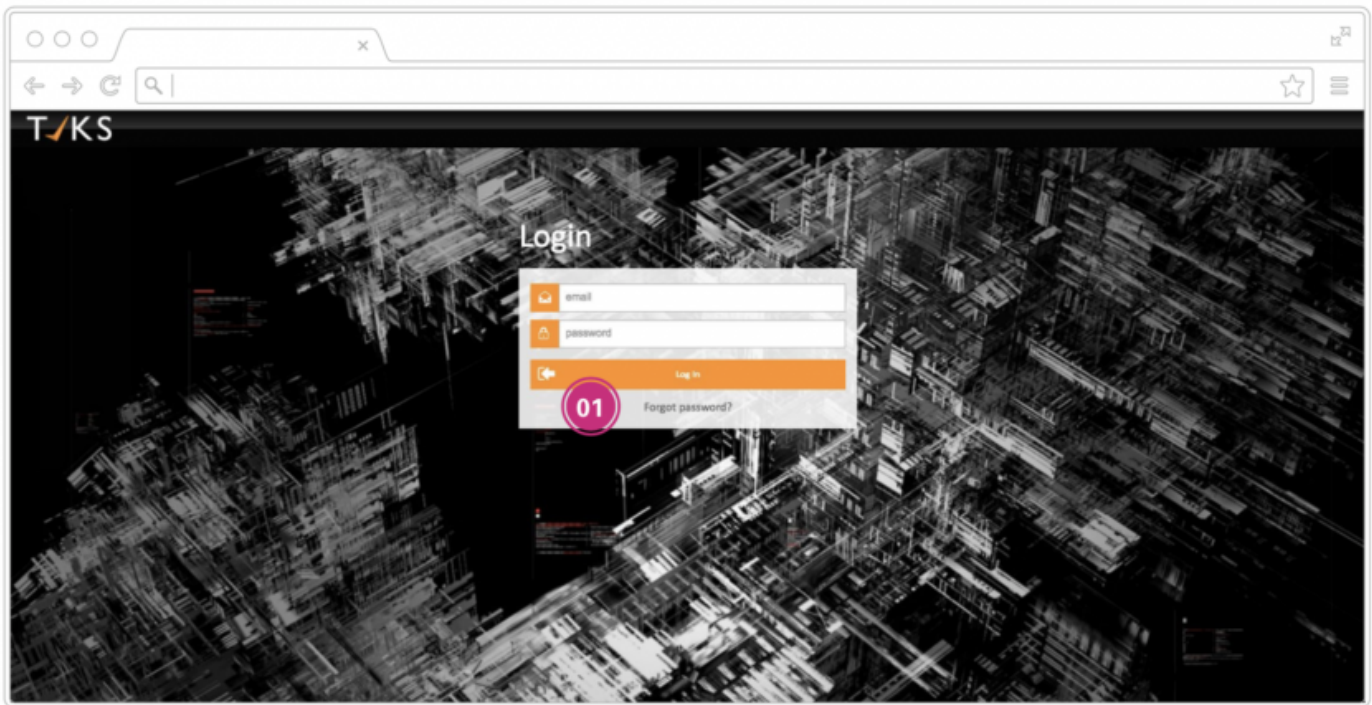
1. You will receive a "Password Reset Link" Email. Click on the link within the email instructions to take you to the password reset.
2. First Re-type your email linked to your TIKS VMS admin portal account. Then the new password you would like to change it to, and simply retype this password to confirm

TIKS <support@chocolatecoded.com.au>
to me

2:23 PM (17 minutes ago)

Hi James Admin,

Click here to reset your password: https://vms-coded.stage.chocolatecoded.com.au/password/reset/0cc3d35a045aa3566fa4ecd8a4026db813285640c3ce76b23f358e4760b2cf2b

03

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TIKS

Change Password

04

email

password

confirm password

Reset Password

Dashboard

Top Bar

- Along the top of the page, you will see a black bar, in the top left corner of the black bar you will see your companies logo.
- Towards the right-hand side of the black bar, you can see a few different icons. The first icon displays the name you are logged in as well as acting as a link to the profile page.
- The 2nd icon details the site you're logged into as well as acting a link to the locations page.
- The final icon is the 'log out' icon, if you select this, you will be logged out of the TIKS VMS admin portal.

Charts

At the top of the dashboard, you can see 2 graphics, these allow you to see important dynamic information at a glance.

1. Circular Graph: This circular graphics simply allows you to see dynamically, the total number of visitors currently on site
2. Line Graph: This provides a little more detail, showing you the number of visitors on site at different time milestones throughout the day.

Tiles
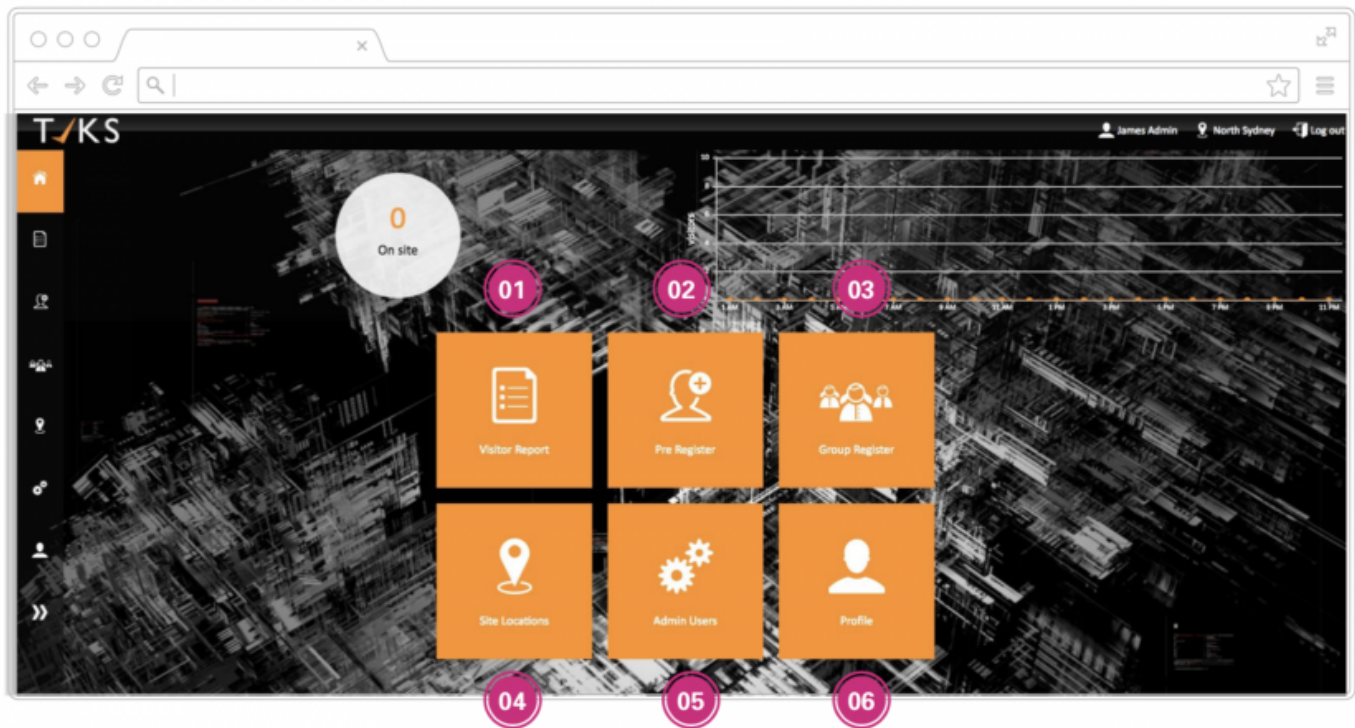
On the dashboard, you will see 6 coloured tiles (depending on your permissions level) these represent the different sections of the TIKS VMS admin portal. These are also detailed in miniature down the left-hand side of the screen. Here's a brief description of what those icons on the coloured tiles mean.

1. **Visitor Report**: This section allows you to run reports on visitors.
2. **Pre Register:** This section allows you to pre register visitors.
3. **Group Register**: This section allows you to register a group of visitors.
4. **Site Locations**: This section allows you to view site locations and edit details, it also allows you to switch between different sites (depending on your permissions level).
5. **Admin Users**: This section allows you to view, add and edit admin users.
6. **Profile**: This section allows you to view and edit your own account details.

Visitor Report

Visit Table

Providing you have visitors on site you will see them listed on this screen. From left to right you will see the following columns;

1. Photo: This is the latest photograph of that particular visitor, taken using the TIKS VMS hardware at the kiosk/tablet they last signed in on.
2. Details: This has the name of the visitor on the 1st line, the company they belong to on the 2nd line and also the telephone number of the visitor. This is the telephone number they entered when signing in.
3. Visiting: This has the name of the person they are visiting on the 1st line, and the date of their visit on the 2nd line.
4. Time: This field has a few different lines of information.
   From: date and time the visitor arrived on site and checked in using the kiosk/tablet.
   Currently on site: will be shown in blue text if that particular visitor is currently on site.
   To: date and time the visitor left site and checked in using the kiosk/tablet or was signed out by an admin user.
   Time on site: hours and minutes the visitor has spent on site in between signing in and signing out.
   Signed Out: will be shown in coloured text, if that particular visitor has already been signed out.
5. Type: Depending on how your site is set up, there can be 3 different types of visitor.
   Staff: Staff work directly for the company, in this case, TIKS.

Visitor: Visitors are people that are coming to site in order to visit a TIKS employee or attend a meeting.

Contractor: A contractor is a visitor coming to site in order to complete some contractual work. An example of this might be a plumber or an electrician.
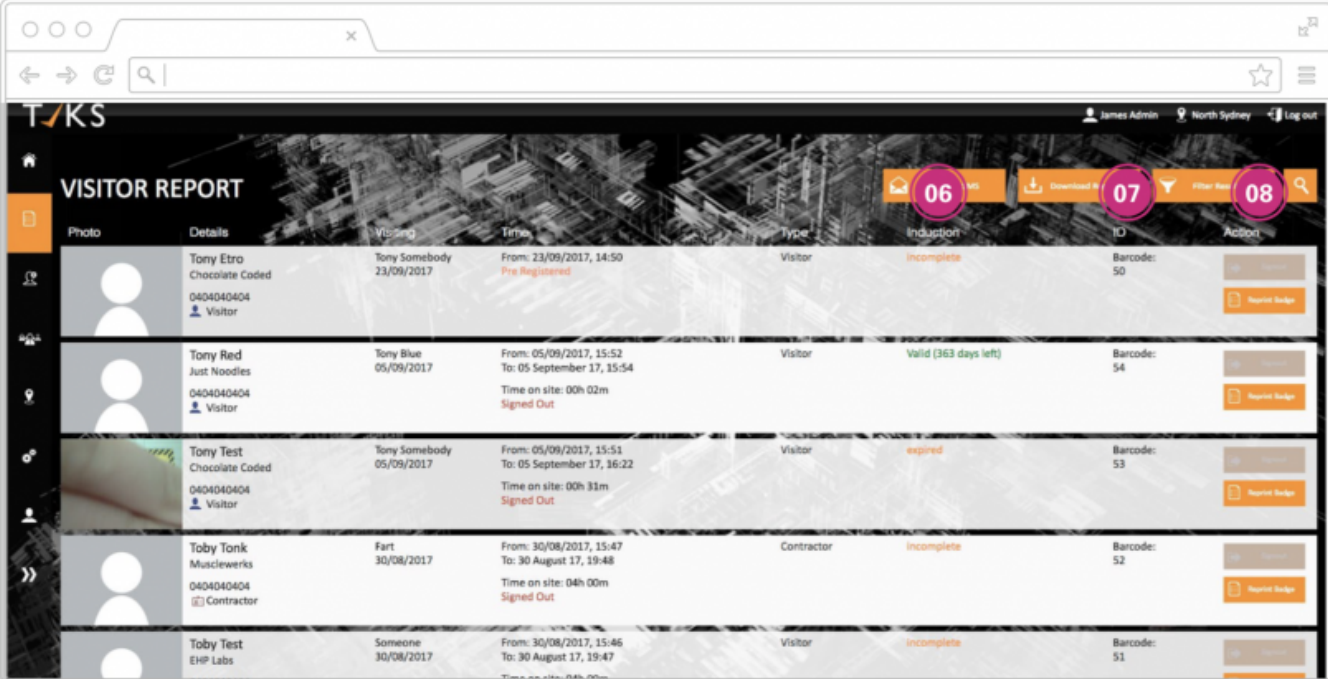

1. **Induction**: This shows whether that visitor has a valid induction. If it's valid, it will say "Valid" in green text with the number of days left until the induction expires in brackets. Induction validity periods are determined in the Global Settings section. If the induction has expired it will say "Expired" in red text and the user will be shown the induction slides when they next sign in at any kiosk/tablet. If the user has been pre-registered and they have not yet completed a site induction, it will say "Incomplete".

2. **ID**: This is a unique visit ID specific to that visit and that visitor, this is what is used to generate the QR code on the badge that the visitor receives. The visitor can use this ID to sign out quickly from one of the kiosks/tablets. If you have a QR code scanner integrated into your system, the visitor can scan the QR code on their badge to sign out.

3. **Action**: This contains a 'sign out' button, which allows you to sign that particular visitor out. If that person has already signed out, the button will be greyed out, and you will not be able to select it.

Downloading the Visitor Report

You may need to download information from your visitor report for use in other reporting tools. We allow exporting of data in both PDF and CSV formats.

1. **Download Report**: In the top right hand corner, you should be able to see a coloured button with the download icon, reading, "Download Report". If you select the coloured "Download Report" button, you'll see a pop-up with the following 2 options.
2. **PDF**: If you select the coloured PDF option, you'll see the window pop-up asking you to save the file, you can name it according to your own naming conventions and select save.
3. **CSV**: If you select the coloured CSV option, you'll see the window pop-up asking you to save the file, you can name it according to your own naming conventions and select save.

Filtering the Visitor Report

1. In the top right hand corner of the Visitor Report page, after the coloured "Download Report" button there is a coloured "Filter Results" button, this allows you to manipulate the visitor data to suit requirements. The following will outline the parameters that you can filter the Visitor Report by
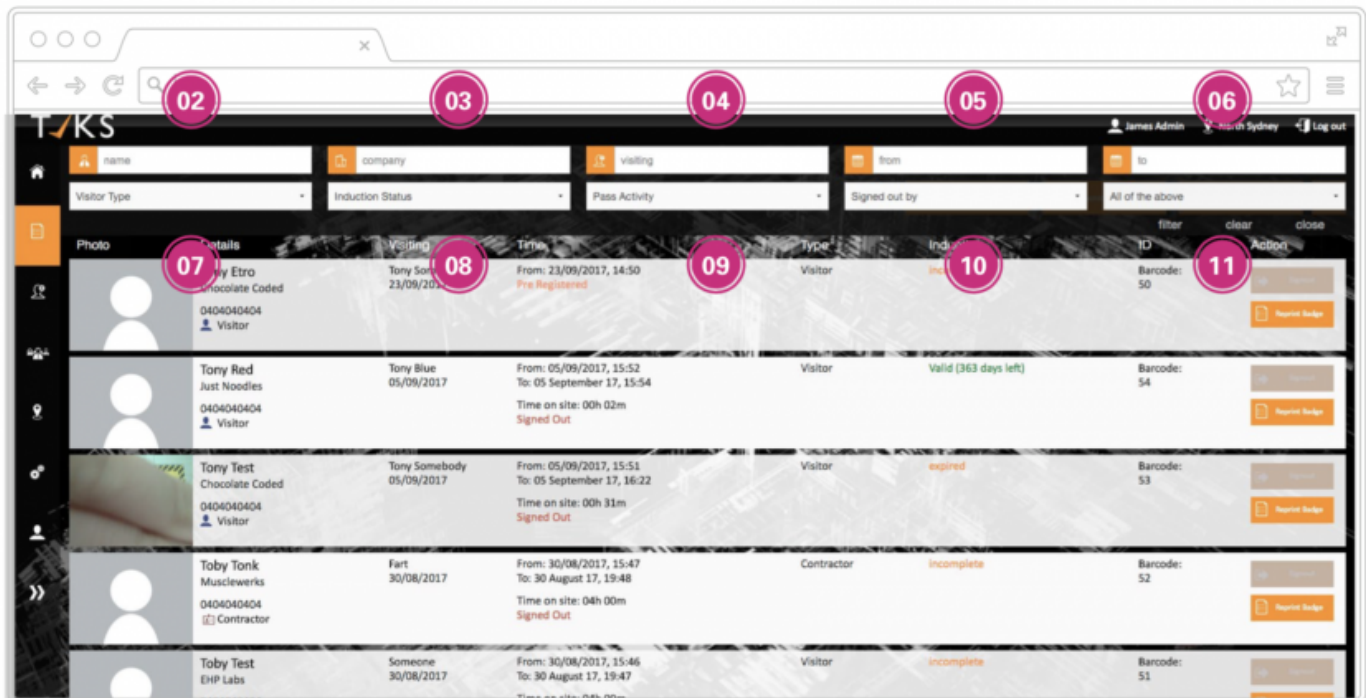
1. **Name**: name of the visitor, you can use the first or last name, or both.
2. **Company**: name of the company that the visitor belongs to.
3. **Visiting**: name of the person the visitor is visiting.
4. **From date**: sets the 'from' date parameter, if you don't set this it will use the current date.
5. **To date**: sets the 'to' date parameter, if you don't set this it will use the current date.
6. **Visitor type**: you can select either 'visitor' or 'VIP' from the drop-down, we will go into more detail regarding these user types later in the user guide.
7. **Induction status**: you can either select 'valid induction' or 'invalid induction' from the dropdown menu.
8. **Pass activity**: you can either select 'active' or 'inactive' from the dropdown menu, this refers to the use of RFID passes. This feature may or may not be in use at your particular site.
9. **Signed out** by: you can either select 'system' or 'user' from the dropdown menu. This refers to whether the visitor signed out at one of the kiosks/ tablets, or whether they were automatically

signed out by the system. Auto log out times can be set in the Global Settings section, which will be explained in more detail later in this user guide.

10. On site: you can either select 'All of the above', 'On Site', 'Pre Registered' or 'Signed Out' from the dropdown menu. This refers to whether the visitor is still on site or the other visit statuses.

1. To apply your filter, select the grey 'filter' text
   in the bottom right-hand corner of the filter bar. You can use a combination of any of the filters together at any one time or you can choose not to use a
   filter, in which case you will just be shown the current visitors on site. If there are no visitors on site currently you will see no results and the text will read, "No visitors are currently on site".
2. To clear your selected filters, select the grey 'clear' text in the bottom right-hand corner of the filter bar
3. To close the filter bar, select the grey 'close' text in the bottom right-hand corner.

Searching the Visitor Report
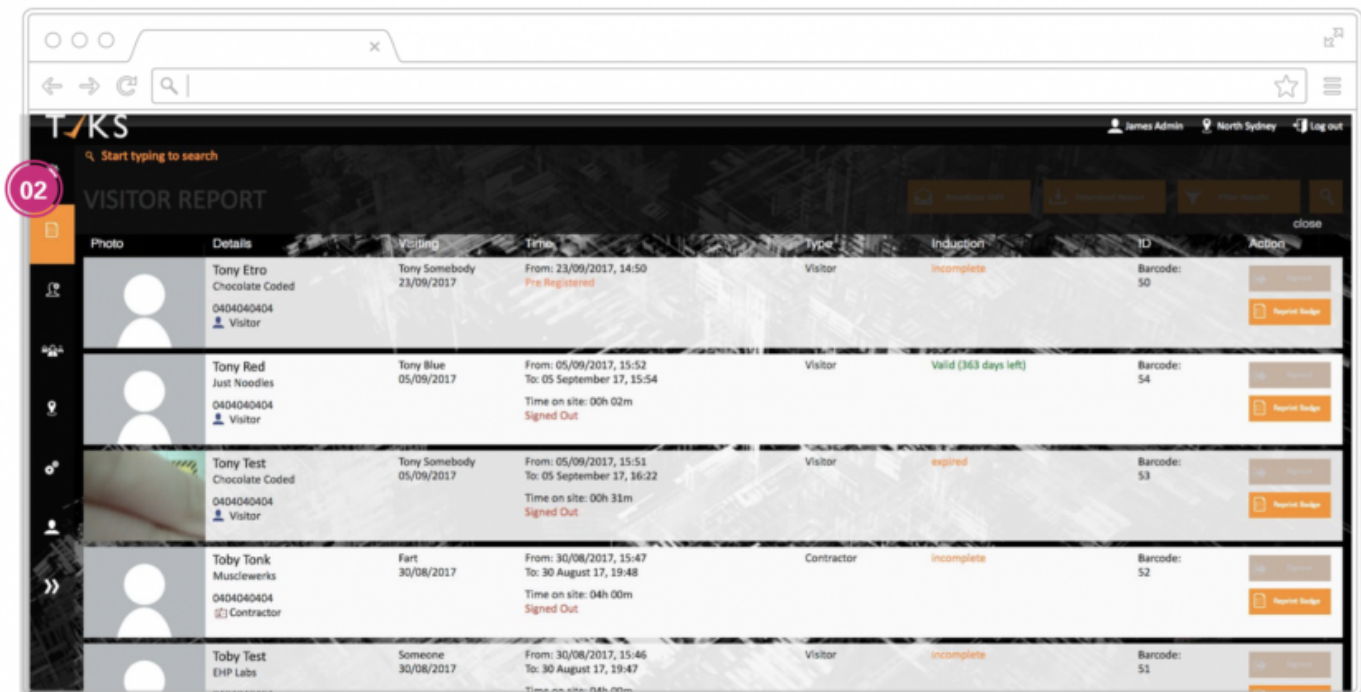
1. In the top right-hand corner of the Visitor Report page, after the coloured "Download Report" and the coloured "Filter Results" button, there is a small search icon. If you'd like to find a specific entry in the Visitor Report page you can use this function. Simply select the coloured magnifying icon

2. At the top of the page a slightly translucent black bar will appear. You can start typing the desired search text and hit enter to complete your search.

Pre-Register

This allows you to send the visitor details of their visit, this is a good reminder to the visitor and also allows them to view important site information before arriving on site. If you pre register a user it can also make their sign in process faster as their details will be pre populated in the TIKS VMS system and so will auto fill some details when the visitor is signing in.

Pre Register Form

1. This form allows you to pre-register visitors by completing the following details;
2. Full Name: This is the full name of the visitor.
3. Visiting Whom: This is the name of the site rep the visitor is visiting.
4. Visitor Type: This drop-down allows you to select from 4 visitor types:
   Visitor: A visitor is the main type of visitor you will use, they are given induction content to view and their photograph is taken when they sign in.
   A VIP visitor type will occur less often, if you set the visitor as a VIP, they will not need to view induction content and they can skip the taking of a photograph when signing in.
5. Company: This is the company the visitor belongs to.
6. Visit Date & Time: This is the approximate time the visitor will arrive on site.
7. Email: This is the email address of the visitor, ensure there are no typo's, as this will be where the badge and induction content will be sent.
8. Phone: This is the telephone number of the visitor, it must be between 8 and 10 digits.
9. Once you have visitors that are pre-registered, they will appear in the table here similarly to the visitor table.

Group Register

Group register is simply pre registering a group of visitors all at once, this is useful if you have many visitors you'd like to pre register.

Group Register Form

1. This form allows you to pre-register visitors as a by completing the following details;
2. Full Name: This is the full name of the visitor.
3. Visiting Whom: This is the name of the site rep the visitor is visiting.
4. Visitor Type: This drop-down allows you to select from 2 visitor types:

   Visitor: A visitor is the main type of visitor you will use, they are given induction content to view and their photograph is taken when they sign in.

   VIP: A VIP visitor type will occur less often if you set the visitor as a VIP, they will not need to view induction content and they can skip the taking of a photograph when signing in.
5. Company: This is the company the visitor belongs to.
6. Visit Date & Time: This is the approximate time the visitor will arrive on site.
7. Email: This is the email address of the visitor, ensure there are no typo's, as this will be where the badge and induction content will be sent.
8. Phone: This is the telephone number of the visitor, it must be between 8 and 10 digits.
9. Once you have visitors that are pre registered, they will appear in the table here similarly to the visitor table.

Adding to a new Group

1. Click Add Visitor to add the currently entered information into a group
2. You will see this information be added below at the bottom of the Group Register form. Each subsequent visitor will have the Company, Visiting and Sign in Time & Date fields pre-filled.
3. Once all the visitors have been added to your group click Register Group to confirm this group. You will be able to edit and add to this group later. The next part will show more of this.

Adding to an existing Group

1. Clicking on the + icon on an existing group will open up a form to add new Visitors to that group.
2. This form shares the same inputs as the previous Group Register form and again will pre-fill the Company, Visiting and Sign in Time & Date fields.

Site Locations
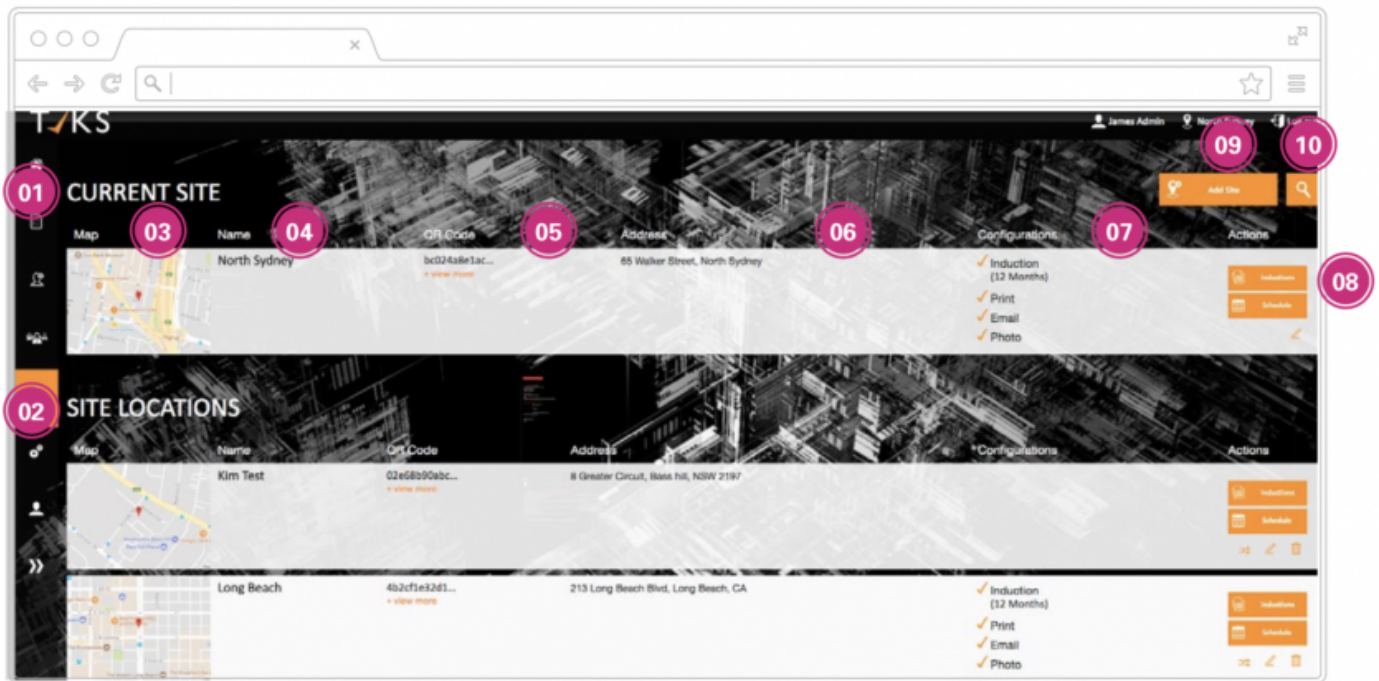
Sites Table

1. Current Site: This shows you the site location you're currently logged into. From this page you can switch to view details for other sites.
2. Site Locations: This section shows a list of all of the site locations also available to switch to. This also includes all of the same details as the Current Site which will be explained.
3. Map: This shows the map that is generated using a Google maps API from the input address.
4. Name: This is the naming of the site, generally companies use the naming convention of the site street in order to make searches easier.
5. QR Code: This is a unique string that is generated when a site location is created. This is the string used to create QR codes that you can display prominently at your site location for people to use if/ when you use the mobile integration for TIKS VMS.
6. Address: This is the site address, this is used to generate the map.
7. Configurations: This shows at a glance the configurations set for the site, the max configurations it will show will be; Induction (?? Months), Print, Email and Photo. If these are in use, they will be shown with a coloured tick for that site.

8. Actions: There are 5 different actions you can select from that will be explained in the next section
9. Add Site: If you would like to add a new site to TIKS VMS, on the Site Location select the coloured "Add Site" button in the top right-hand corner, this will open up an Add Location pop-up. This will be explained further in a later. section.
10. Search: If you'd like to find a specific site in the Site Location page you can use this function. Simply select the coloured magnifying icon and a slightly translucent black bar will appear along the top of the page. You just start typing the desired search text and hit enter to complete your search.

Sites Actions

1. Inductions: If you select this button, you can view and edit the induction slides for that site. Depending on how your site is set up, you will be able to see 3 tabs on the inductions page; Visitor, Staff and Contractor. You can have different induction content for each of these different user types and it will be shown to them when signing in.
2. Schedule: This button allows you to leave a message on the tablet/kiosk for times when the desk is unmanned. It allows you to schedule an instruction message on the screen.
3. Switch: This function allows you to switch to the selected site (dependant on your permissions level). Once you have successfully switched you'll see the site you're logged into in the "Current Site" section and you'll also see the site name appear in the top right-hand corner of the black bar.
4. Edit: This is the naming of the site, generally companies use the naming convention of the site street in order to make searches easier.
5. Delete: This is a unique string that is generated when a site location is created. This is the string used to create QR codes that you can display prominently at your site location for people to use if/when you use the mobile integration for TIKS VMS.

Adding a new Site Location
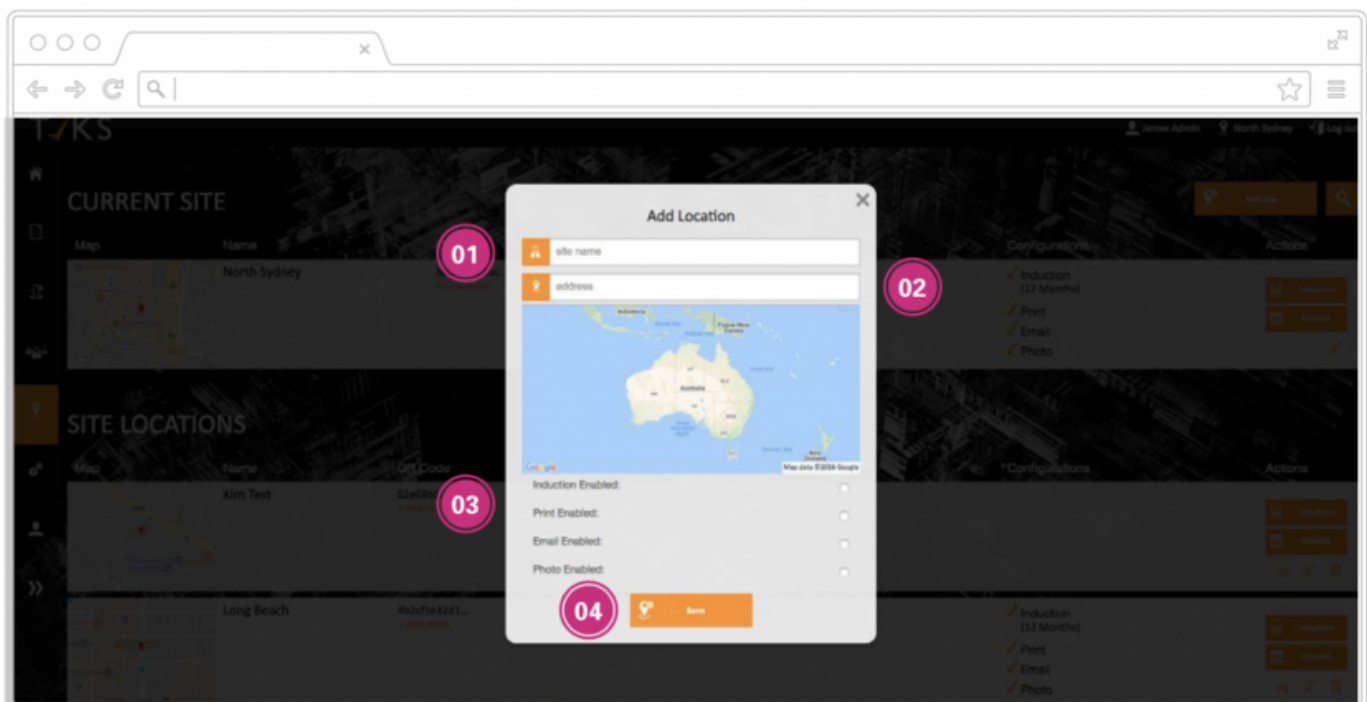
1. Site name: Name of your new Site Location.
2. Address: Typing in the address will automatically locate the address on the map within the image below.

3. Checkboxes: Select the checkboxes for the configurable settings: Inductions, Print, Email and Photo. If you select to have inductions on, you will see a drop-down menu appear, this menu allows you to select how long the induction will be valid for.

4. Save: Once you have filled out the relevant fields, select the coloured Save button. Once successfully saved, the new Site Location will appear in the list.

Admin Users

Admin Register Form

1. Full Name: This is the full name of the Administrator.
2. Email: Email address of the Administrator.
3. Phone Number: Telephone number of the Administrator.
4. Choose a role: This drop down allows you to select from different role types.
   For example; Administrator, Manager, Staff. Each role type has a different level of permissions which can be viewed in the permission matrix.
5. View Matrix: This displays the permissions for each of the different roles.
6. Register: Clicking this will send an email to the email address entered within the Admin Register form and add them into the Admin Table below.

Admin Table

1. Location: The site location the administrator belongs to.
2. Permission Level: A reflection of the "Role" chosen in the above section.
3. Member Since: This is the date that the administrator was registered on the system.
4. Action: There are two different action buttons:Edit: This function allows you to edit any of the above administrator details.

   Delete: This function allows you to delete any of the TIKS VMS administrator accounts, if you select this button a confirmation pop-up will appear, asking you to confirm that you'd like to delete the user.
   If you decide to delete an administrator account, they will no longer have access to the TIKS VMS administration portal.

Profile

This page allows you to view and edit your TIKS VMS admin portal details, there are a few different fields that you can edit;
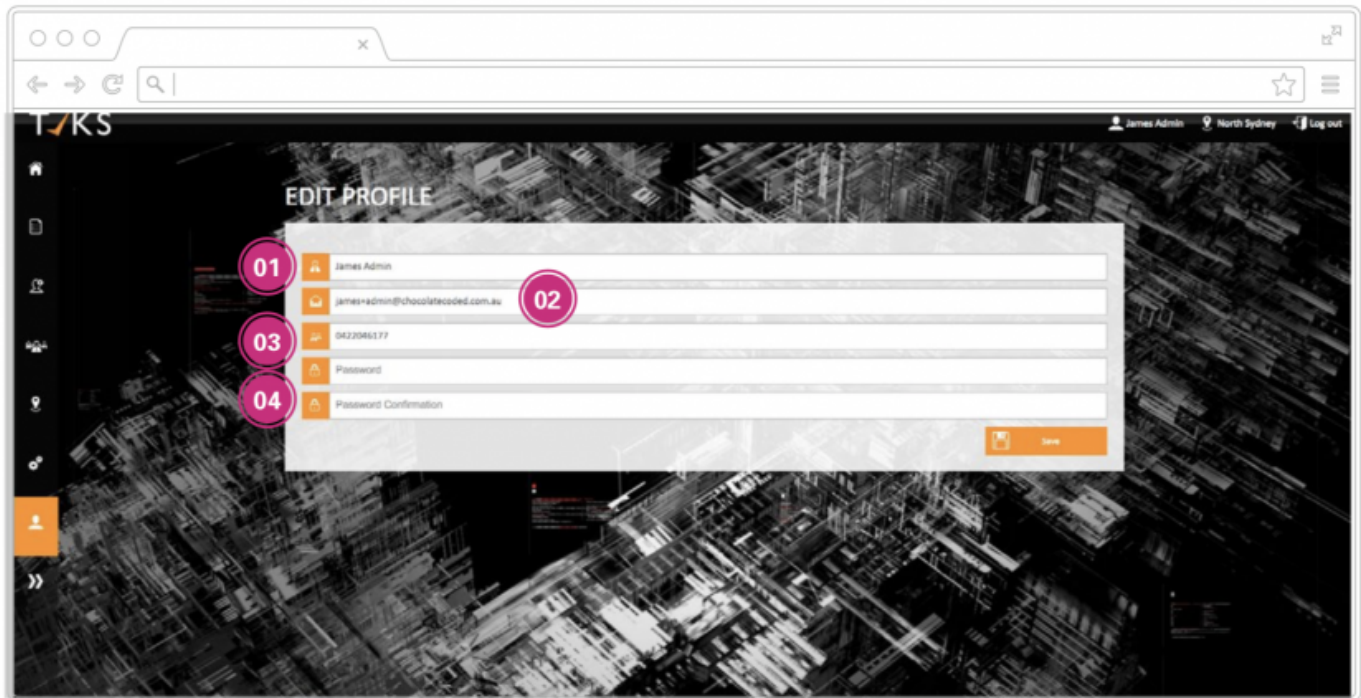
Edit Profile Form

1. Full Name: This needs to be your full name, you edit by selecting the name field, changing the details by typing and once you're done, select the coloured 'Save' button.

2. Email: There is validation on this field and so it has to be a valid email address with an "@" and ".com" for example email@example.com. You can edit your email address by selecting the field, changing the details by typing and once you're done, select the coloured 'Save' button.

3. Phone Number: There is validation on this field and so the telephone number has to be between 8 and 10 digits. You can edit your email address by selecting the field, changing the details by typing and once you're done, select the red 'Save' button.

4. Password: For security reasons, in order to change any details in the password section, you must also type in your TIKS VMS admin portal password. If you'd like to change your password, simply type the desired password into the correct field and replicate exactly in the password confirmation field and select the coloured 'Save' button.