



Name	Title	Signature	Date
Author: Chan Yee Kwan	Assistant Computer Officer		2020-12-29
Reviewer: George Yuen	Computer Officer		2021-01-03
Approver: Roger So	Senior Computer Officer		

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## 1. Introduction

The Visitor Registration System (VRS) gives participating departments administrators to register their visitors who are going to visit the University, send invitation emails to visitors with QR code for entrance and generate visiting reports.

## 2. Features

VRS provides the following key features:

- **Managed Events and Visitors:** VRS provide departments administrators a platform to create and manage events. In each event, the departments administrators can manage the participants.
- **Send Invitation to Visitors Automatically:** Departments administrators can set the email template. System helps sending the email with a QR code to participants.
- **Taking Visitors' Attendance Quickly:** With the QR code, departments administrators can record visitor's attendance quickly. Departments administrators can set the valid date, to-be-scanned times of the QR code.
- **View visitors' Check-in Record:** It allows users to browse visiting records and generate visiting reports. The access right of able to view the data, how big is the scope of data is different between roles. (Please refer Appendix A to see the access right of different roles.)
- **Manage System Users:** With the access right of managing system users, departments administrators can create and manage users. In VRS, there are different roles. One user can only be assigned to one role. (Please refer Appendix A to see the access right of different roles.)

## 3. Benefits to Departments and Visitors

With the VRS, departments can enjoy the following benefits:

- **Manage the Event and Visitors Easily:** Department user can use the system to organize event. System can help sending invitation to participants and logging their check-in record.
- **Visitors Check-in Quickly with the QR code:** Participants just need present the QR code in the invitation email.
- **Easy Communication with CUHK Security Office:** CUHK Security Office is the central administrator of VRS. They will do visitors' check-in procedure with visitors' QR code in the received invitation email. It helps shorten the check-in procedure and communication time.

## 4. Service Request Procedures

Refer to Security Office.



## 5. User Guides

Go to [Visitor Registration System](#). Use SSO login.

### A. Manage the event

#### Remarks:

System will only keep record for 30 days after the event day.

Click “Event” at the left menu bar.

#### 1. Create Event.

For example, we now create a workshop held by ITSC.

Choose the Department and click “Create”. (For example, we choose ITSC.)

Visitor Registration System

Hello, Yee Kwan Chan

Event - Current [Past Event](#) Event / List

Event

Information Technology Services Centre + Create

Show 25 entries Search:

ID	Name	Event Date	Venue	Contact Person
No data available in table				

Showing 0 to 0 of 0 entries Previous Next

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Fill in the information of event in “Details” tab.



Visitor Registration System

Hello, Siu Ho Tung

Event

Event / Create

Create

Details Email

Name\*

Event Date\* 2021/01/26 Time\* 12:01

Venue\*

Organizer\* Information Technology Service Centre

Contact Person\* Siu Ho Tung

Email

Contact Number

QR Code Validity: From\* 2021/01/26 Time\* 07:00

QR Code Validity: To\* 2021/01/26 Time\* 18:00

QR Code Validity Count\* 1

Remarks

### Remarks:

Must fill in all the mandatory fields (\*).

QR Code Validity From Time: should not earlier than 07:00.

QR Code Validity To Time: maximum is 23:59.

QR Code Validity To Time should not earlier than QR Code Validity From Time.

QR Code Validity Count: Should not larger than 10.

Fill in the information of event in “Email” tab  
Customize the email subject and content here.

Visitor Registration System

Hello, Siu Ho Tung

Event

Event / Create

Create

Details Email

Email Subject

Visitor Registration System Receipt

Email Content

Dear {Visitor},

We are looking forward to see you at CUHK.

Please show the QRCode below when entry {Venue}

{QRCode}

The code valids at {Period}

Best Regards,

Visitor Registration System


{Remarks}

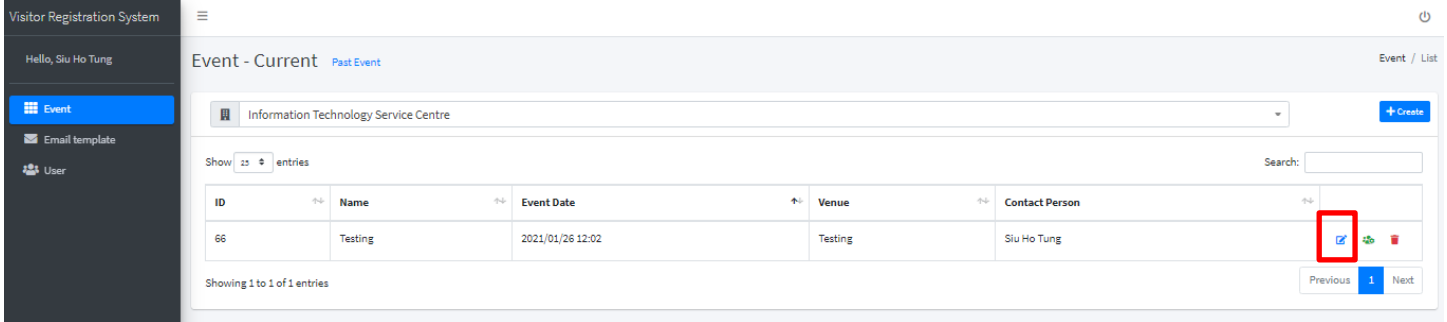
Back to List Save

After finish, click “Save”. The event will be saved.



## 2. Edit Event

Click  to edit the event.



Visitor Registration System

Hello, Siu Ho Tung

Event




Email template

User

Event - Current [Past Event](#) [Event / List](#)

Information Technology Service Centre [+ Create](#)

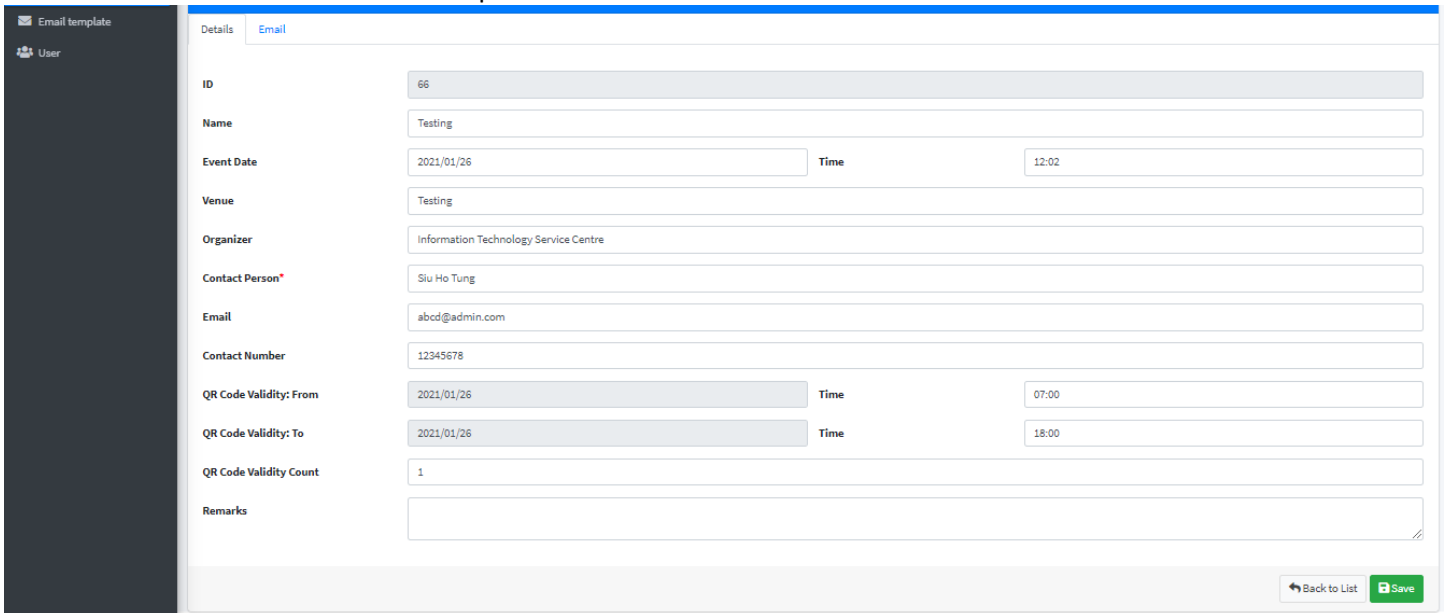
Show 25 entries Search:

ID	Name	Event Date	Venue	Contact Person	
66	Testing	2021/01/26 12:02	Testing	Siu Ho Tung	  

Showing 1 to 1 of 1 entries

Previous 1 Next

Edit the event information or email template. And then click “Save”.



Email template

User

Details [Email](#)

ID: 66

Name: Testing

Event Date: 2021/01/26 Time: 12:02

Venue: Testing

Organizer: Information Technology Service Centre

Contact Person\*: Siu Ho Tung

Email: abcd@admin.com

Contact Number: 12345678

QR Code Validity: From: 2021/01/26 Time: 07:00

QR Code Validity: To: 2021/01/26 Time: 18:00

QR Code Validity Count: 1

Remarks:

[Back to List](#) [Save](#)



**Email Subject**  
Visitor Registration System Receipt

**Email Content**

Dear {Visitor},

We are looking forward to see you at CUHK.

Please show the QRCode below when entry {Venue}

{QRCode}

The code valids at {Period}

Best Regards,  
Visitor Registration System  
{Remarks}

Tag for email parameter:  
- Event Name\* : {Event}  
- Event Date : {EventData}  
- Event Time : {EventTime}  
- Venue : {Venue}  
- Department / Organizer : {Department}  
- Contact Person's Name : {Name}  
- Contact Email : {Email}  
- Contact Number : {Contact}  
- Event Remarks : {Remarks}  
- QR Code Validity Start Date, Start Time, End Date and End Time : {Period}  
- Visitor Name : {Visitor}  
- Visitor Others : {Others}  
- QRcode : {QRCode}  
\* also apply to subject

Back to List Save

### 3. Delete Event

Click  to delete the event.




Visitor Registration System

Hello, Siu Ho Tung

Event - Current Past Event

Information Technology Service Centre

Show 25 entries Search:

ID	Name	Event Date	Venue	Contact Person	
66	Testing	2021/01/26 12:02	Testing	Siu Ho Tung	  


Showing 1 to 1 of 1 entries

Previous 1 Next

### B. Manage the visitors

#### Remarks:

System will only keep record for 30 days after the visit day.

Click  to manage the visitors



### 1. Create Visitor

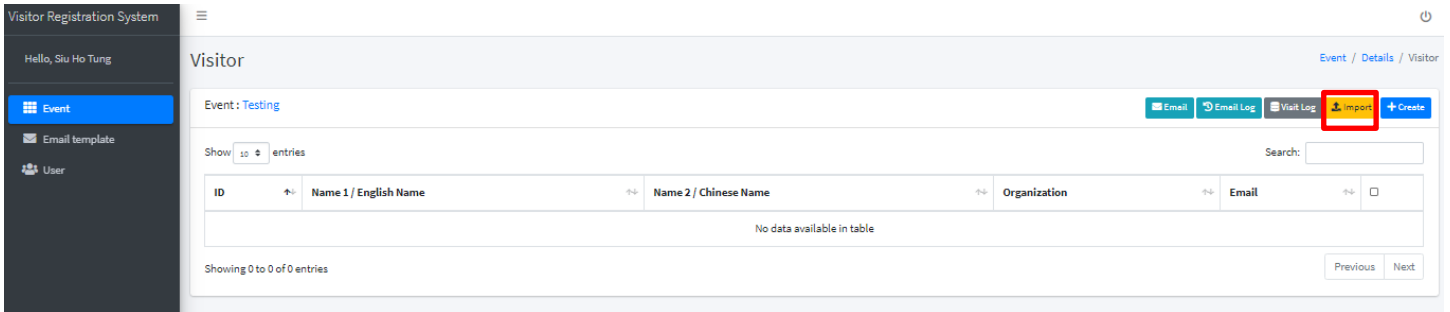
After created the event, we need to add the visitor's information. Then the system will send visitors the invitation email. Visitor can be added one by one or by batch.

Click "create" to add visitor one by one

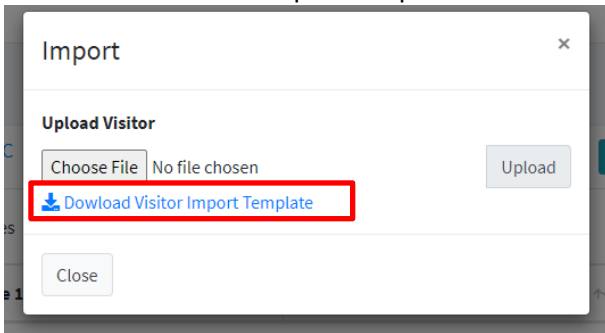
Fill in visitor's information. Then click "Save".

Click "Import" to add visitors by batch





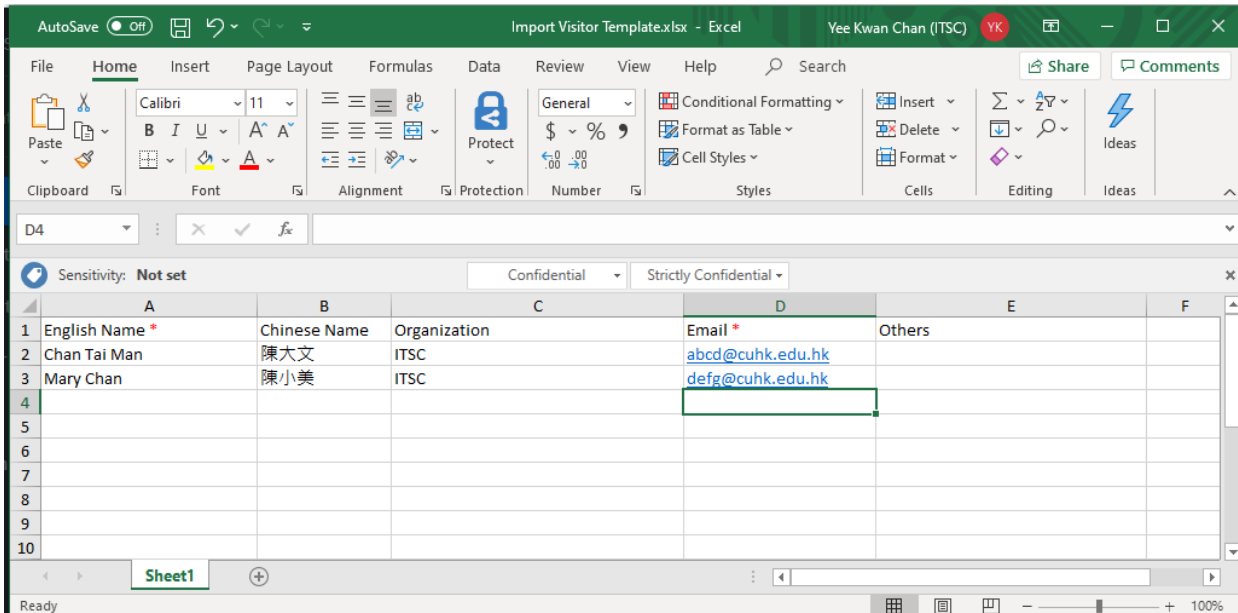
Download the Visitor Import template excel file.



Fill in all the visitors' information and save the file.

Remarks:

Must fill in all the mandatory fields (\*).



Choose the file and upload it.



## Import

**Upload Visitor**

**Choose File** Import Visitor Template.xlsx **Upload**

[Download Visitor Import Template](#)

Close

Then the visitors' information will be imported into system.

## Visitor

Event: Testing ABC

Success  
Imported 2 visitors

Email Email Log Visit Log Import Create

Show 10 entries Search:

ID	Name 1 / English Name	Name 2 / Chinese Name	Organization	Email	
1020	Chan Tai Man	陳大文	ITSC	abcd@cuhk.edu.hk	<a href="#">Edit</a> <a href="#">Delete</a>
1021	Mary Chan	陳小美	ITSC	defg@cuhk.edu.hk	<a href="#">Edit</a> <a href="#">Delete</a>

Showing 1 to 2 of 2 entries

Previous 1 Next

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## 2. Edit Visitor

Click [Edit](#) to edit the visitor

## Visitor

Event: Testing

Email Email Log Visit Log Import Create

Show 10 entries Search:

ID	Name 1 / English Name	Name 2 / Chinese Name	Organization	Email	
1023	Chan Tai Man	陳大文		abcd@cuhk.edu.hk	<a href="#">Edit</a>

Showing 1 to 1 of 1 entries

Previous 1 Next

Edit the information and click "Save".



**Edit**

ID: 1023

Name 1 / English Name\*: Chan Tai Man

Name 2 / Chinese Name: 陳太文


Organization:

Email\*: abcd@cuhk.edu.hk

Contact Phone Number:

Others:

QRCode



EZQDLOMR0000000066

QR Code Used Count: 0

Buttons: Back to List, Save

**3. Delete Visitor**  
Click  to Delete Visitor

Visitor Registration System

Hello, Siu Ho Tung

Event / Details / Visitor

Event: Testing

Show 10 entries

ID	Name 1 / English Name	Name 2 / Chinese Name	Organization	Email	
1023	Chan Tai Man	陳太文		abcd@cuhk.edu.hk	

Showing 1 to 1 of 1 entries

**4. Send Invitation**  
Select or unselect participants you want to send them invitation by checking the box or click the data row. Then click "Email".

Visitor Registration System

Hello, Siu Ho Tung

Event / Details / Visitor

Event: Testing

Show 10 entries

ID	Name 1 / English Name	Name 2 / Chinese Name	Organization	Email	
1023	Chan Tai Man	陳太文		abcd@cuhk.edu.hk	<input checked="" type="checkbox"/>
1024	Mary Chan			defg@cuhk.edu.hk	<input type="checkbox"/>

Showing 1 to 2 of 2 entries

It shows the email sender and content. You can edit the fields if you need. Then click "Send" to send out invitation.



### Email ✕

2 visitor(s) selected

**Sender**

**Send From**

**Subject**

**Content**

**B I U** Source Sans Pro 16

Dear {Visitor},

We are looking forward to see you at CUHK.

Please show the QRCode below when entry {Venue}

{QRCode}

The code valids at {Period}

Best Regards,

Visitor Registration System

{Remarks}

Visitor Registration System ☰

Hello, Siu Ho Tung

**Event**

Email template

User

**Success**  
Email send successfully

[Email](#) [Email Log](#) [Visit Log](#) [Import](#) [Create](#)

### Visitor

Event: Testing

Show  entries Search:

ID	Name 1 / English Name	Name 2 / Chinese Name	Organization	Email	
1023	Chan Tai Man	陳太文		abcd@cuhk.edu.hk	<a href="#">✕</a> <a href="#">✖</a>
1024	Mary Chan			defg@cuhk.edu.hk	<a href="#">✕</a> <a href="#">✖</a>

Showing 1 to 2 of 2 entries [Previous](#) [Next](#)



5. View Email History Log  
Click "Email log" to view email history log.

The screenshot shows the 'Visitor' page for an event named 'Testing'. In the top right corner, there are several action buttons: 'Email', 'Email Log' (highlighted with a red box), 'Visit Log', 'Import', and 'Create'. Below the buttons is a table with the following data:

ID	Name 1 / English Name	Name 2 / Chinese Name	Organization	Email
1023	Chan Tai Man	陳太文		abcd@cuhk.edu.hk
1024	Mary Chan			defg@cuhk.edu.hk

Email Log

The 'Email Log' modal window displays a table with the following data:

ID	Sender	Receiver	Subject	Date
185	abcd@admin.com	abcd@cuhk.edu.hk	Visitor Registration System Receipt	26/1/21 12:11:38 PM
186	abcd@admin.com	defg@cuhk.edu.hk	Visitor Registration System Receipt	26/1/21 12:11:38 PM

6. View Participants Checked-in History Log  
Click "Visitor log" to view participants checked-in history log.

Remarks:  
System will only keep record for 30 days after the visit day.

The screenshot shows the 'Visitor' page for an event named 'Testing'. In the top right corner, there are several action buttons: 'Email', 'Email Log', 'Visit Log' (highlighted with a red box), 'Import', and 'Create'. Below the buttons is a table with the same data as in the previous screenshot:

ID	Name 1 / English Name	Name 2 / Chinese Name	Organization	Email
1023	Chan Tai Man	陳太文		abcd@cuhk.edu.hk
1024	Mary Chan			defg@cuhk.edu.hk

Visit Log

The 'Visit Log' modal window displays an empty table with the following headers:

ID	Visitor Name	Visit Time	Reader	Remark
No data available in table				

At the bottom right of the modal, there is an 'Export' button.



### C. Manage the Email Template

System will show this email template as default email in all the events under this department. For example, you can list out the department contacts/ information in the email contact

Click “Email template” at the left menu bar.

Choose the department and edit the email subject and content. Click “Save” when finish.

Visitor Registration System

Hello, Siu Ho Tung

Event

**Email template**

User

## Email Template

Information Technology Service Centre

Email Subject: Visitor Registration System Receipt

Email Content:

Dear {Visitor},

We are looking forward to see you at CUHK.

Please show the QRCode below when entry {Venue}

{QRCode}

The code valids at {Period}

Best Regards,

Visitor Registration System

{Remarks}

Tag for email parameter:

- Event Name\* : {Event}
- Event Date : {EventDate}
- Event Time : {EventTime}
- Venue : {Venue}
- Department / Organizer : {Department}
- Contact Person's Name : {Name}
- Contact Email : {Email}
- Contact Number : {Contact}
- Event Remarks : {Remarks}
- QR Code Validity Start Date, Start Time, End Date and End Time : {Period}
- Visitor Name: {Visitor}
- Visitor Others: {Others}
- QRcode : {QRCode}
- \* also apply to subject

Send Trial Save

### D. Manage the User

You can manager the system user here. When you add the user, you should also set his/her access right. For example, which department the user belongs to? Which role should be assigned to the user?

#### Remarks:

One user can select one role (Department Administrator/ Department User).

Please refer Appendix A to see the access right of different roles.

User can belong to more than one department under the same role.

Click “User” at the left menu bar.

#### 1. Create User

Click “Create” to create user



Visitor Registration System

Hello, Siu Ho Tung

Event  
Email template  
**User**

User / List

Office of Student Affairs

Show 25 entries Search:

Staff ID	Name	Role	Department	Enable	
248XXX	Testing 2	Department User	ITSC, Information Technology Service Centre, Office of Student Affairs, United College	Yes	<a href="#">✎</a>
395XXX	Siu Ho Tung	Department Administrator	Information Technology Service Centre, Office of Student Affairs	Yes	<a href="#">✎</a>

Showing 1 to 2 of 2 entries Previous 1 Next

Fill in the user's information.

Click "Save" when finish,

Visitor Registration System

Hello, Siu Ho Tung

Event  
Email template  
**User**

User / Create

Create

Staff ID\* 356677

Name\* Chan Tai Man

Email abcd@cuhk.edu.hk

Phone 12345678

Role\* Department Administrator

Department\* Information Technology Service Centre

Enable

Back to List Save

## 2. Edit User

Click [✎](#) to edit user

Visitor Registration System

Hello, Siu Ho Tung

Event  
Email template  
**User**

User / List

Office of Student Affairs

Show 25 entries Search:

Staff ID	Name	Role	Department	Enable	
248XXX	Testing 2	Department User	ITSC, Information Technology Service Centre, Office of Student Affairs, United College	Yes	<a href="#">✎</a>
395XXX	Siu Ho Tung	Department Administrator	Information Technology Service Centre, Office of Student Affairs	Yes	<a href="#">✎</a>

Showing 1 to 2 of 2 entries Previous 1 Next

Edit user's information and click "Save".



Visitor Registration System ⏻

Hello, Siu Ho Tung User / Create

**User - Create**

**Create**

Staff ID*	<input type="text" value="556677"/>
Name*	<input type="text" value="Chan Tai Man"/>
Email	<input type="text" value="abcd@cuhk.edu.hk"/>
Phone	<input type="text" value="12345678"/>
Role*	<input type="text" value="Department Administrator"/>
Department*	<input type="text" value="Information Technology Service Centre"/>
Enable	<input checked="" type="checkbox"/>

[Back to List](#)





## 6. Appendix A

There are nine roles involved in the Visitor Registration System and their responsibilities.

Role Name	Data Access Scope	Functions
Dept User	Department Data	<ul style="list-style-type: none"> <li>- Create and manage (e.g. edit, delete) events</li> <li>- Register and manage visitors</li> <li>- Send invitation to visitors</li> <li>- Browse visiting records and generate visiting reports</li> <li>- Dept User covers all Dept Validator's features</li> </ul>
Dept Admin	Department Data	<ul style="list-style-type: none"> <li>- Create "Dept User" and the corresponding management</li> <li>- Dept Admin covers all Dept User features</li> </ul>
Dept Validator	Department Data	<ul style="list-style-type: none"> <li>- Run the mobile application to validate visitors' QR codes and CU Link cards</li> </ul>
Central User	All Data	<ul style="list-style-type: none"> <li>- Same as "Dept User"</li> <li>- Central User covers all Central Validator's features</li> </ul>
Central Admin	All Data	<ul style="list-style-type: none"> <li>- Create "Dept Admin", "Central User" and the corresponding management</li> <li>- Central User covers all Central User, Dept Admin and Log Reader's features</li> </ul>
Central Validator	All Data	<ul style="list-style-type: none"> <li>- Same as "Dept Validator"</li> </ul>
Log Reader	All Data	<ul style="list-style-type: none"> <li>- Can access all visiting logs, including all archived logs and generate visiting reports</li> </ul>
System Admin	All Data	<ul style="list-style-type: none"> <li>- Create "Central Admin" and the corresponding management</li> </ul>
<b>Technical Notes</b>		
<ul style="list-style-type: none"> <li>• A user can only be one role</li> <li>• Central validator and dept validator don't have the access right of the web-based administration system</li> </ul>		