

# Visitoria

Version 2.0

## Quick Tour

### Introduction

This document is intended to walk you through Visitoria in action to give you a feeling of what working with the system is like. You can simply read on or follow the material by reproducing it step by step in Visitoria application.

Visitoria is the application for appointment accounting. Using the application you can register all visitors of your company and print badge for every visit.

### Installation process

To install Visitoria application you should run SetupVisitoria.exe.

On the first install step you can see information about the product: *Product Version, Developers, Home Page*.

On the second step you should select the installation type: Clean Installation or Application Update.

**Important!** By selection *Clean Installation* mode you will loose all the existing data in case the application is already installed. If this is your first installation of Visitoria application, run the first mode: *Clean Installation*. If you want to update application select the second mode: *Application Update*. In this case you will save all your data in DB (client data, appointment data, settings) and you will have the new application version.

During the next steps of the installation process you should change the destination folder and decide whether create desktop shortcuts or not.

After the installation process is complete, the application will start automatically.

## Importing the license

The next step is importing license for the application. You can get the license for a specific number of users or unlimited users license. Also you can get license for a specific period or without expiration date.

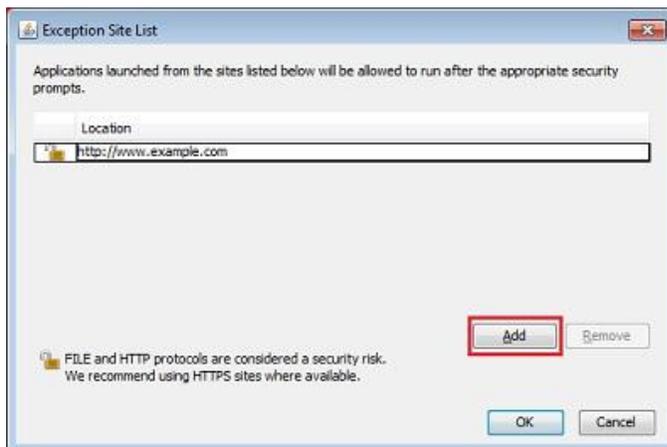
If you have a license you should put it in **license** folder under the application installation path (for example: C:\\Program Files\\Visitoria\\license). After this step you should close and then run the browser again to let the changes be applied.

## Security issues within the newest version of Java

Starting with Java 7 Update 51, Java has enhanced security model to make user system less vulnerable to the external exploits. The new version of Java does not allow users to run the applications that are not signed (Unsigned), Self signed (not signed by trusted authority) and the applications that are missing permission attributes.

### Steps to Add URL to the Exception Site list:

1. Go to the Java Control Panel (On Windows Click Start and then Configure Java)
2. Click on the Security tab
3. Click on the Edit Site List button
4. Insert URL - "*http://localhost:8080*"
4. Click the Add in the Exception Site List window

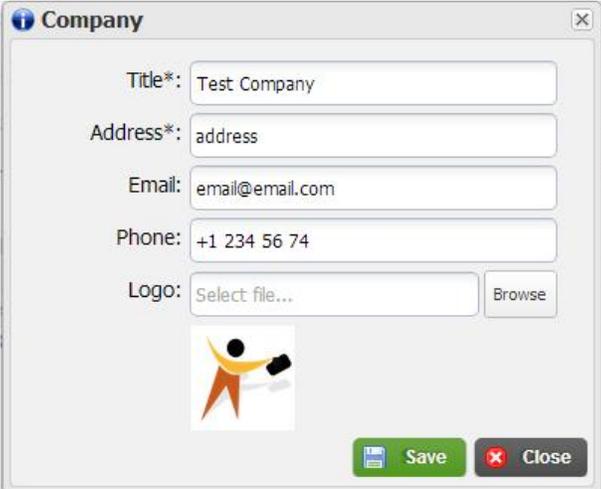


## Application Settings

**Important!** If you run the application for the first time you should accept all security warning prompts.

After the application is loaded, you may want to change a number of settings to start using it.

In the menu “Settings → Company Information” you can enter the information about your company: Title, Address, Email, Phone, Logo.

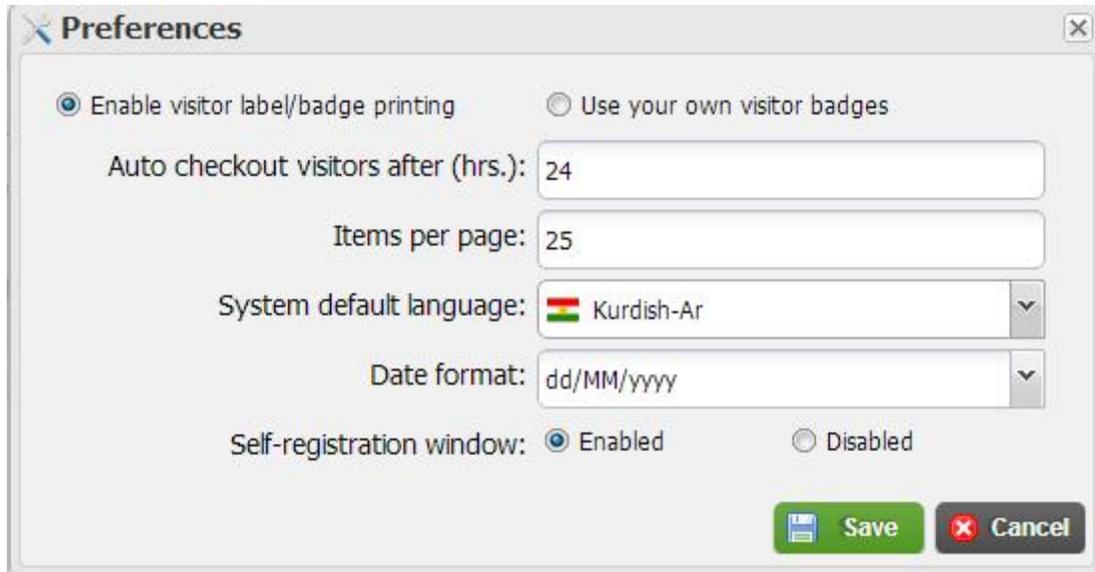


The image shows a dialog box titled "Company" with a close button (X) in the top right corner. It contains several input fields and a file selection button:

- Title\*: Test Company
- Address\*: address
- Email: email@email.com
- Phone: +1 234 56 74
- Logo: Select file... (with a "Browse" button next to it)

Below the input fields is a small icon of two stylized figures. At the bottom right of the dialog box are two buttons: "Save" (with a floppy disk icon) and "Close" (with a red X icon).

In the menu “Settings → Preferences” you can change the auto checkout option for visitors, number of displayed items per page, system default language, format for date. Also you can select the mode of badge printing: *Enabling printing from the application* or *Using your own visitor badges*. These settings are system-wide and can be overridden then for specific user in “My Profile” near the Logout button.



In the menu “My Profile“ each application operator user can set the information for his account: Full Name, Email, Phone, Language, Date Format, Items per page, Printer Name, Badge Height, Badge Width. Also on this panel you can change the password.

**Important!** If you did not accept the warning prompts and cannot set the printer, you need to clear cache and restart the browser

The image shows a 'My profile' dialog box with the following fields and values:

- Full Name\*: Operator Fullname
- Email: email@email.com
- Phone: +1 2345 45 5
- Language: Kurdish-Ar (with a flag icon)
- Date format: dd/MM/yyyy
- Items per page: 25
- Printer name: HP LaserJet M1522 MFP Series PCL 6
- Badge height, mm: 41
- Badge width, mm: 89
- Change password

At the bottom right, there are two buttons: a green 'Save' button and a dark grey 'Cancel' button with a red 'X' icon.

## Registering a new visit

Main application page serves the purpose of registering new visit. Here is placed the form for entering new visit data and the list of already registered visits. Visitor record will be created automatically after new visit creation and can be edited later in the corresponding section "Visitors".

When adding a new visit entry the system will ask whether this visitor should be automatically checked in. If it is not confirmed, the check in can be done later.

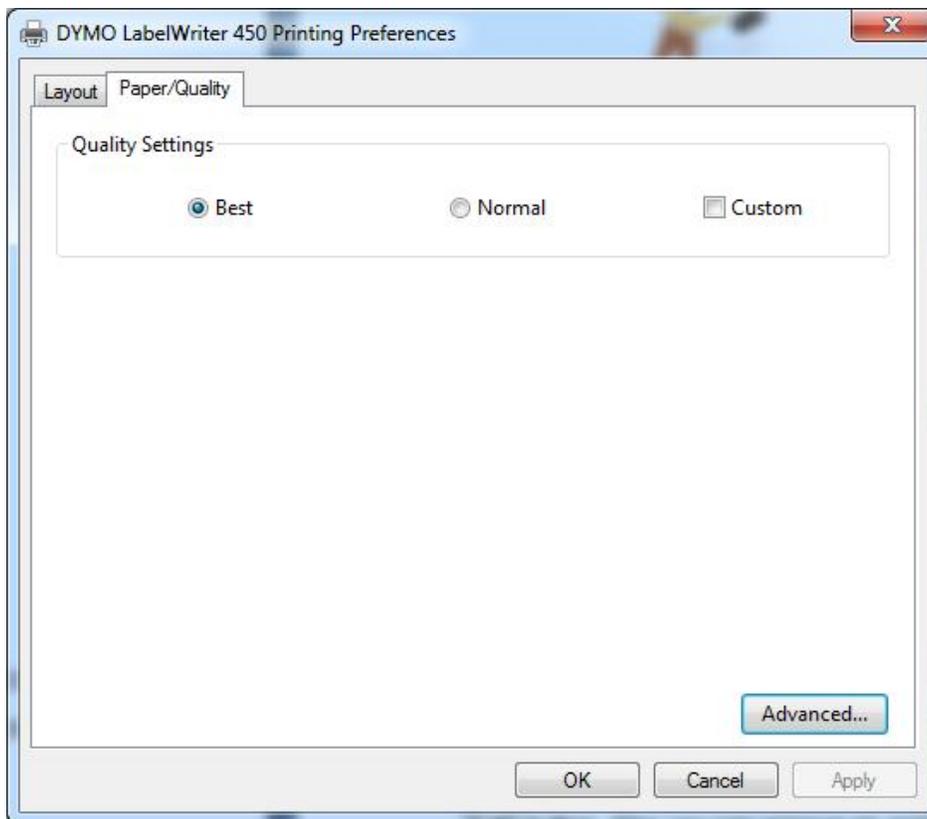
**Important!** Badge printing is available for Checked In visits only. As soon as the visit is Checked Out, the badges cannot be printed anymore for this visit.

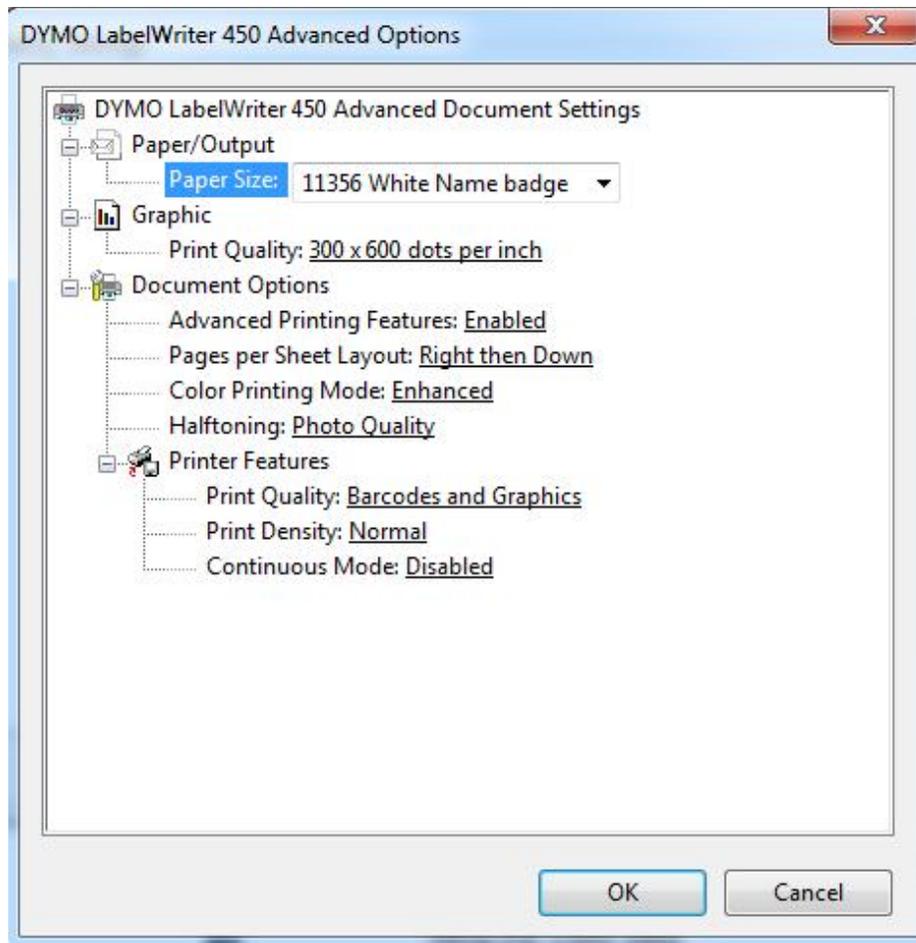
## Badge printing

If all the setting steps regarding printing described above were performed correct, you should be able to print badges for all checked in visits. After the button 'Print Badge' is clicked, the badge with corresponding visit data will be sent for printing. The badge example can be seen below:



We recommend using Dymo Label writer 450 and change the printer properties to the following best printing quality:



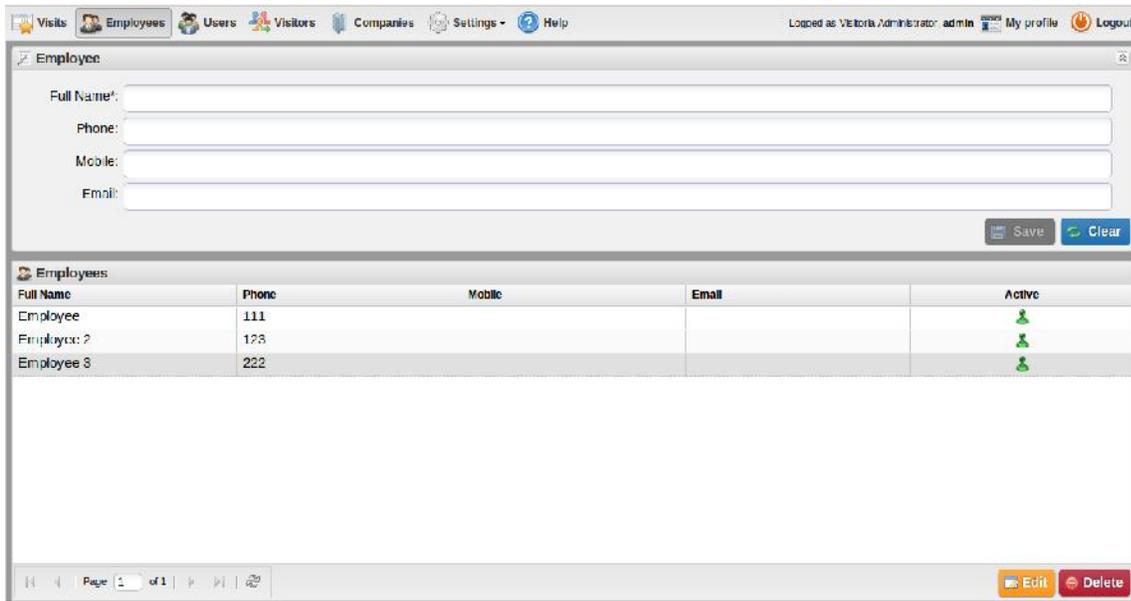


Paper size depends on the paper you are using, but we recommend a type which is adhesive

## Managing employees

For managing employees the “Employees” tab should be used. There are two parts on this tab as well as on the others: the form for add/edit employee and the grid with existing employees. If you want to add new employee you should fill the form with full name, phone, mobile and email and press the “Save” button. After this step the new employee will appear in the grid. You can edit an existing employee with double click on the row or selecting the row and pressing the “Edit” button. Also you can remove an existing employee by selecting the row and pressing the “Delete” button.

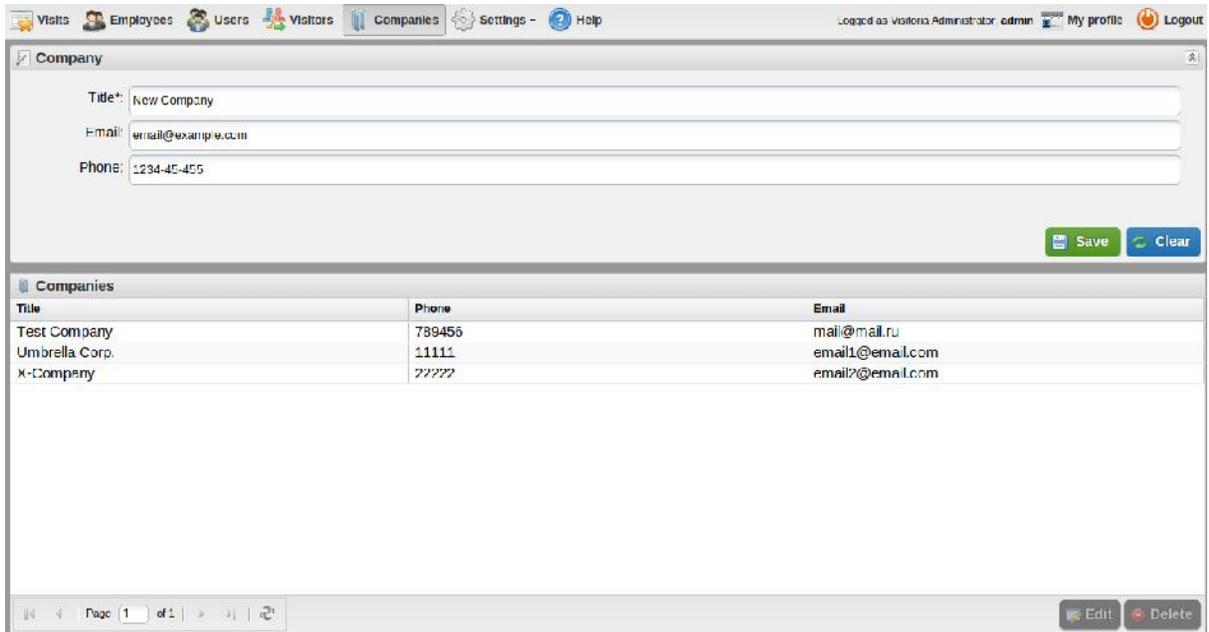
The employee can be active or not active. If the employee is not active you can not use him for filling the Visits data.



## Managing companies

For managing companies select the “Companies” tab. It has form and grid with the same functions as others.

If you want to add new company you should fill the form with title, email and phone and press the “Save” button. After this step the new company will appear in the grid. You can edit an existing company with double click on the row or selecting the row and pressing the “Edit” button. Also you can remove an existing company by selecting the row and pressing the “Delete” button.



## Managing users

For managing users select the “Users” tab. It has form and grid with the same functions as others.

If you want to add new user you should fill the form with full name, login, password, email, phone and group and press the “Save” button.

The field “Group” describes the privileges of the user. The new user can be administrator, moderator and a simple user.

Each of these roles has different privileges in application:

**User** is the basic users of the system and uses the features that are geared toward daily management of visitors and appointments to the organization. These tasks are outlined below:

1. Register a new visitor
2. Display current visitor list
3. Editing of visitors: This can be performed on visitors which are not checked out.
4. Delete a visitor appointment: Today's appointments except of those which are checked out may be deleted. When deleting an appointment the visitor personal data shall NOT be deleted.
5. Print the list of current and future appointments/visits
6. Add notes to checked out visitor. Each comment entered will be marked with the user's name and date of admission. It should be easy to distinguish the comments from each other.

**Moderator** is the group above user in user management hierarchy. This groups inherits all the right from USER and have the following extra rights

1. Viewing and search visitor / appointment history. Search filter on regard to the "from date" and "to date" (default is both today's date), the visitor's name, company name and employee name.
2. Print History/search result
3. Add and edit staff/employees

**Administrator** group is the highest in the user hierarchy and has all rights to the system. Administrator inherits all rights from the Moderator and in addition is also responsible for user management and system maintenance as outlined below:

1. User administration.  
Delete a user  
Edit a user  
Activate a user  
Deactivate a user: If the user is already logged in, auto logout the deactivated user
2. Update the system (automatically or manually)
3. Backup: Manual backup all data stored in the system. This includes data in database and preferences.
4. Restore backup from a file

## 5. Company/Customer information:

Company name

Address

Email

Phone number

Logo (picture)

After this step the new user will appear in the grid. You can edit an existing user with double click on the row or selecting the row and pressing the “Edit” button. Also you can remove an existing user by selecting the row and pressing the “Delete” button.

The screenshot displays the 'User' management interface. The form fields are as follows:

Field	Value
Full Name*	Full Name
Login*	admin
Password*	*****
Email	admin@example.com
Phone	123-45-67
Group*	Administrator

Below the form is a table of users:

Full Name	Login	Phone	Email	Group	Active
Simple User	user	010101010		User	

## Self-registration

The Visitoria application also allows self-registration. This means that the visitor can access page for registering himself. The registration requires the following data to be entered by the visitor: full name, company and employee he/she wants to visit. Self registration page is accessible at <http://localhost:8080/register>.