<table>
<thead>
<tr>
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<th>Title</th>
<th>Signature</th>
<th>Date</th>
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<tr>
<td>Author:</td>
<td>Chan Yee Kwan</td>
<td></td>
<td>2020-12-29</td>
</tr>
<tr>
<td>Reviewer:</td>
<td>George Yuen</td>
<td></td>
<td>2021-01-03</td>
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<tr>
<td>Approver:</td>
<td>Roger So</td>
<td></td>
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<th>Version</th>
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<tr>
<td>2020-12-29</td>
<td>v0.1</td>
<td>Chan Yee Kwan</td>
<td>Initial Draft</td>
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The Chinese University of Hong Kong
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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 participators.

- **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 participators and logging their check-in record.

- **Visitors Check-in Quickly with the QR code**: Participators 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.)

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

After finish, click “Save”. The event will be saved.
2. Edit Event
Click ☑️ to edit the event.

Edit the event information or email template. And then click “Save”.
3. Delete Event
   
   Click to delete the event.

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.
2. **Edit Visitor**

   Click 📝 to edit the visitor

   Edit the information and click “Save”. 

Then the visitors’ information will be imported into system.
3. **Delete Visitor**
   Click **Delete Visitor**

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”.

   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

abco@admin.com

Send From

Subject

Visitor Registration System Receipt

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]

Send

Visitor Registration System

Hello, Visior

Event: Testing

ID | Name 1 | Name 2 | Chinese Name | Organization | Email
---|--------|--------|--------------|--------------|--------
1023 | Chan Tai Yee | | | | abco@cuhk.edu.hk
2024 | Mary Chan | | | | abco@cuhk.edu.hk
5. View Email History Log
Click “Email log” to view email history log.

Email Log

<table>
<thead>
<tr>
<th>ID</th>
<th>Sender</th>
<th>Receiver</th>
<th>Subject</th>
<th>Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>185</td>
<td><a href="mailto:abcd@admin.com">abcd@admin.com</a></td>
<td><a href="mailto:abcd@cuhk.edu.hk">abcd@cuhk.edu.hk</a></td>
<td>Visitor Registration Receipt</td>
<td>26/1/21 12:11:38 PM</td>
</tr>
<tr>
<td>186</td>
<td><a href="mailto:abcd@admin.com">abcd@admin.com</a></td>
<td><a href="mailto:defg@cuhk.edu.hk">defg@cuhk.edu.hk</a></td>
<td>Visitor Registration Receipt</td>
<td>26/1/21 12:11:38 PM</td>
</tr>
</tbody>
</table>

Showing 1 to 2 of 2 entries

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.
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.

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
Fill in the user’s information.

Click “Save” when finish,

2. Edit User
Click  to edit user

Edit user’s information and click “Save”.
6. Appendix A

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

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Data Access Scope</th>
<th>Functions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dept User</td>
<td>Department Data</td>
<td>- Create and manage (e.g. edit, delete) events</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Register and manage visitors</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Send invitation to visitors</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Browse visiting records and generate visiting reports</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Dept User covers all Dept Validator’s features</td>
</tr>
<tr>
<td>Dept Admin</td>
<td>Department Data</td>
<td>- Create “Dept User” and the corresponding management</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Dept Admin covers all Dept User features</td>
</tr>
<tr>
<td>Dept Validator</td>
<td>Department Data</td>
<td>- Run the mobile application to validate visitors’ QR codes and CU Link cards</td>
</tr>
<tr>
<td>Central User</td>
<td>All Data</td>
<td>- Same as “Dept User”</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Central User covers all Central Validator’s features</td>
</tr>
<tr>
<td>Central Admin</td>
<td>All Data</td>
<td>- Create “Dept Admin”, “Central User” and the corresponding management</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Central User covers all Central User, Dept Admin and Log Reader’s features</td>
</tr>
<tr>
<td>Central Validator</td>
<td>All Data</td>
<td>- Same as “Dept Validator”</td>
</tr>
<tr>
<td>Log Reader</td>
<td>All Data</td>
<td>- Can access all visiting logs, including all archived logs and generate visiting reports</td>
</tr>
<tr>
<td>System Admin</td>
<td>All Data</td>
<td>- Create “Central Admin” and the corresponding management</td>
</tr>
</tbody>
</table>

**Technical Notes**
- A user can only be one role
- Central validator and dept validator don’t have the access right of the web-based administration system