

## **AN-287**

# Protege GX Visitor Management System

Application Note



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Last Published: 20-Oct-23 2:08 PM

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## Introduction

The Protege GX Visitor Management System (VMS) is a licensed feature that allows you to manage visitor sign-in, identity labels, access, notification, and sign-out - all without a separate piece of software. The VMS interface runs as a limited version of the Protege GX client, providing just the basic functions required for visitor management.

Each visitor signs in on arrival using a simple, customizable interface that can be run on a PC at the front door. The VMS then prints a visitor label - also fully customizable, with optional Photo ID - and automatically assigns the visitor a credential and an access level based on who they have come to see. An email notification is automatically sent out to relevant parties, ensuring that important visitors will not be left waiting at the door. Signing out is just as easy: the visitor need only scan a bar code or select their name from a dropdown to mark that they have left.

All of these features are fully integrated into Protege GX. When a visitor signs in, the system creates a user record for them and downloads it to the controller. This allows visitors to immediately access the parts of the site that they need and provides accurate event reporting of where they are at all times. Like any user, a visitor record can be edited or disabled directly within Protege GX as the situation demands.

This application note describes the standard operation of the Protege GX VMS and gives full programming instructions for setting up the VMS in Protege GX.

## Prerequisites

The following software must be installed and operational:

Component	Version	Notes
Protege GX software	Version 4.0.128 or higher	The Protege GX client must be installed on the workstation or entry station that will be used to sign in visitors.

#### Licensing

License	Order Code	Notes
Protege GX Visitor Management System License	PRT-GX-VIM	1 license per system.
Protege GX Photo ID License	PRT-GX-PHOTO	1 license per system.  This license is required to create visitor labels, even if the labels do not include photos.
Protege GX Concurrent Client License	PRT-GX-CLNT	1 concurrent client license will be used by each VMS workstation, as they are continuously logged in to the system. Two are provided with the standard license.

## **Basic VMS Operation**

The VMS interface runs as a separate Protege GX client on a dedicated workstation. To open Protege GX as a VMS, simply log in to the client on a workstation that has been configured as a VMS interface in the software (see page 10). A dialogue will pop up inviting the operator to run Protege GX as a VMS.

The VMS will generally open as a fullscreen interface. The home screen contains **Sign in** and **Sign out** buttons, and can optionally display a company logo, advertisement banners and other images.

The following describes the basic operation of the VMS when it is correctly programmed.

#### Signing In

- 1. The visitor (or an operator) presses the **Sign in** button.
- 2. The sign-in page will prompt the visitor to enter the following details (using either a regular keyboard or the onscreen keyboard for touchscreens). This information is required and will be used to create a user record for the visitor.
  - First name
  - Last name
  - Person they are visiting

This information is used to automatically assign an Access Level to the visitor. Optionally, email notifications may be sent to users who receive visitors.

Duration of visit

This is indicative only and does not affect the expiry of credentials or access levels. The **Expected** departure time can be found under Users | Users | Visitor.

- 3. The visitor presses **Next**. Any additional pages configured for the VMS are then displayed. These may include requests for additional information (e.g. company, license plate, purpose of visit) or notices requiring acknowledgement (e.g. health and safety notices).
- 4. If a photo is required for a card or label, the VMS will connect to the workstation's default webcam or inbuilt camera and display a live image. The visitor can press **Take photo** and then **Next** to continue.
- 5. When the visitor presses the **Print card** button, the VMS will create a user record for the visitor. The visitor will automatically be assigned a credential from the pool set aside for visitors, and an access level based on the person they are visiting.
  - Credentials can be set aside for visitors in the **Visitor | Cards** section. Each time a visitor signs in, the next card from this list will be automatically assigned and the **Card in use** checkbox checked. If there are no credentials available to assign to the visitor, no user record will be created and the visitor will be prompted to contact the receptionist or person they are visiting.
  - The event log will display the event: "User <USER\_NAME> Created By Operator <OPERATOR\_NAME>".
- 6. If the user record for the visitor has been created successfully, the VMS will connect to the workstation's default printer and print a visitor label or card. This label is designed within Protege GX and may contain visitor details such as name and photo, as well as a barcode for easy sign out (see below).
- 7. Once sign in is complete, the VMS will return to the home screen.
- 8. The visitor's user record can be edited manually within Protege GX if corrections or changes (e.g. additional access levels) are required.

All user records created for visitors have the **User is a visitor** option ticked in the **Users | Users | Visitor** tab.

#### Signing Out

- 1. The visitor (or operator) presses the **Sign out** button in the VMS.
- 2. There are two options for signing out, which can be used either separately or as alternative options:
  - Select the visitor's name from dropdown list
  - Scan the bar code on visitor label or card

Alternatively, visitors can be signed out in Protege GX by clicking the **Sign out visitor** button in the **Users | Users | Visitor** tab.

3. When the visitor presses **Sign out**, their user record will either be deleted or disabled, depending on the VMS configuration.

When the VMS 'disables' a user, it removes their credential and checks the **Visitor card disabled** option in the **Visitor** tab. It does not check the **Disable user** checkbox (**Options** tab) or remove the visitor's access level.

- 4. Once sign-out is complete, the VMS will return to the home screen.
- 5. If the same visitor signs in again using the VMS, a new user record will be created (an existing disabled record will not be reactivated). Disabled visitor records can be manually reactivated by assigning them a credential in Protege GX.

Assigning a visitor credential to a user directly within Protege GX will not automatically cause the **Card in use** checkbox to be enabled. This means that the VMS may give a duplicate card error the next time it attempts to sign in another visitor. However, after this the VMS will move on to the next available card, so any subsequent sign-in attempts will be successful.

## **Programming Overview**

#### Required programming

- Create a VMS template
- Configure users to support visitors
- Add visitor cards
- Create a visitor label template
- Add a VMS workstation

### Optional programming

- Add additional pages to the VMS template
- Add images to the VMS template
- Create a dedicated VMS operator

### Creating a VMS Template

When run as a VMS, the Protege GX client opens as a limited interface that allows visitor names and other details to be entered. The settings, details and design of the VMS interface are configured through a VMS template. Multiple VMS templates can be created, allowing you to present different company branding at different sites on the same system, or even request different visitor details at the front door compared to the delivery door.

This is required programming for running the VMS.

You can create a VMS Template in **Visitor | Templates**. Below is a summary of the most important settings that should be configured to run the VMS. For more information, see Appendix: VMS Template Settings (page 14).

- **Site**: Select the site in which this VMS template will be used from the top toolbar.
- General tab:
  - **Card template**: You must set a card template to use for printing visitor labels. For more information, see Creating a Visitor Label Template (next page).
  - **Checkout mode**: Select whether each visitor's user record will be disabled (i.e. have their credential removed) or deleted when that visitor signs out of the VMS.
  - **Photo required**: Set whether or not the VMS will take a photo of the user as they sign in. This requires a webcam or integrated camera on the VMS workstation.
  - **Download user to controllers**: Must be enabled for the VMS to function.
  - **Show print dialogue**: If this setting is enabled, the VMS will show a print dialogue allowing the user to select a printer for the visitor label. If it is disabled, the computer's default printer will be used. This option is useful for testing as it allows you to cancel the printing of any labels but still sign in the visitor.
  - **Sign out**: The two options for signing out are **Scan bar code** (as printed on the visitor label) and **Select name from drop down**. One or both options can be used.
- Pages tab: This tab allows you to add additional pages to the VMS sign in process. These can present additional information or request further visitor details. For more information, see Adding Additional Pages to the VMS (page 10).
- **Email tab**: Any operators added to this tab will receive an email whenever a visitor signs in using this VMS template. This is in addition to the email sent to a user when somebody is visiting them (see next page).
  - Email notification options require an SMTP mail server to be configured under **Global | Settings | Email** settings.
- **Display tab**: The default display of the VMS is blank with no company branding, and will use the color theme that the operator has set for the Protege GX client (on the **Home** page). This tab allows you to customize the

display of the VMS to match company branding by setting colors and adding images such as logos (see page 10).

By default the VMS interface will use the Protege GX display theme and display colors (set in the Home page) of the operator who opened it. You can override most of these colors in the Display tab, but not all. Therefore, it is recommended that the operator who typically runs the VMS retain a Protege GX display theme consistent with the design of the VMS template.

## Configuring Users to Support Visitors

The Protege GX VMS requires that all visitors indicate the person they are visiting when they sign in. To appear in the drop down, a Protege GX user must be configured to support visitors. Visitors can be assigned an access level based on the person they are visiting, and optionally an email may be sent to the user to inform them that a visitor has arrived.

This is required programming, as the VMS will not register visitors unless a user is selected. If there are no specific people who should receive visitors, it may be useful to create a Reception user record for use with visitor sign in.

- 1. Navigate to **Users | Users** and select a user who is expected to receive visitors (such as a manager).
- 2. Open the **Visitor** tab and enable the **User supports visitors** option.
- 3. Set the **Visitor access level**. This Access Level will be assigned to any visitors who select this user from the dropdown menu. This setting can be left at No access if required.
- 4. Set the **Visitor notification mode** to either None or Email. If you have selected Email, enter the user's **Notification email address**.

Email notification options require an SMTP mail server to be configured under **Global | Settings | Email** settings.

## Creating a Visitor Label Template

A label will be printed for each visitor who signs in to the VMS. The VMS requires a card template to define the design of the labels and the information to be included.

Further instructions for configuring card templates can be found in Application Note 149: Creating a Photo ID Template.

This is required programming, as the VMS will not register visitors unless a card template is selected. If physical labels are not required, it is recommended that you set the workstation's default printer to a virtual printer such as Microsoft Print to PDF.

- 1. Navigate to **Users | Card template editor** and add a new card template for the relevant **Site**. Use the **Copy from existing** option to duplicate an existing template if desired.
- 2. Set the basic template layout options depending on the required design:
  - Templates are portrait by default. To set the template to landscape, click the **LndScp** checkbox in the right toolbar
  - Expand the **Card template properties** menu and select whether the template will **Print both sides**. If this option is unchecked, only the front of the template must be designed.
  - Click the **Background...** button (top left) and select a background color for the card (both front and back as required).
- 3. Add text, images and other elements to the template as required for the visitor labels. To add an object, open the appropriate menu in the **Properties** section on the right and click **Add**. The object name and other details can be edited once the object has been added.

Once displayed on the template, objects can be arranged and resized by clicking and dragging.

- **User fields**: Add a field that will automatically be filled with user data when printed. This allows the label to display useful visitor information such as name, time of entry and photo. Consider what information will be useful for identifying the visitor within the building.
  - User fields: Text fields such as Name, Card Number and Current Date.
  - **Custom fields**: Custom fields, as configured in **Users | Custom Fields**. These can be filled out by the visitor on custom VMS pages (see next page).
  - **Photo holder**: The visitor's photo, if this has been taken as part of the sign-in process.
  - Bar code: A bar code representing the visitor that can be scanned for quick sign-out. Under Custom field, select the information that will be encoded by the bar code. Then select an encoding method (e.g. Code128) and drop it onto the template.
- **Text**: Add a static piece of text such as a title. Font, size and text style can be configured.
- **Images**: Add an image such as a company logo by browsing to its location.
- 4. **Save** the card template.
- 5. Navigate to **Visitor | Templates**. In the **General** tab, set the **Card template** to the one created above.

### **Creating Visitor Cards**

Visitors signing into the VMS will be assigned a card (or similar credential) from a pool of VMS cards specifically set aside for that purpose. These should be spare credentials that are not assigned to any user. When the visitor signs out, the card will be unassigned and ready for use by another visitor.

VMS cards will be assigned to visitors in the order that they are added, not in order of card number. If there are no VMS cards remaining, the VMS will not sign in any visitors. Ensure that there are sufficient VMS cards available for the expected number of concurrent visitors.

This is required programming, as the VMS will not sign in visitors unless there are credentials available to assign to them. If physical visitor credentials are not required, it may be useful to create 'dummy' VMS cards that can be assigned to visitors, but do not correspond to any physical card.

- 1. Navigate to **Visitor | Cards** and add a new VMS Card for the relevant **Site**.
- 2. Enter the **Facility number** and **Card number** of a card that will be used by visitors.
- 3. Take note of the **Card in use** field this will be checked when the card has been assigned to a visitor.
- 4. Create additional VMS cards for each physical card that is available to assign to visitors. It is recommended that you consider the maximum number of visitors you would expect to be onsite at the same time, as new visitors will not be allowed to sign in if the VMS cards have run out.

### Adding a VMS Workstation

Protege GX will only run as a VMS on machines that are on the list of VMS workstations.

This is required programming to allow you to open the VMS.

- 1. Navigate to **Visitor | Workstations**. Add a new VMS workstation for the relevant **Site**.
- 2. Add the **Computer name** of the machine that should run the VMS.
- 3. Set the **Visitor management template** to the VMS template created earlier. This allows different workstations to run different template designs.
- 4. Optionally, set the **User record group**. Any user records created by the VMS on this workstation will be automatically assigned to the selected record group.
- 5. Now you can run the VMS. Log into the Protege GX client as normal on the workstation configured above. A popup will ask if you wish to run the client as a VMS. Select **Yes**.

Now the basic functionality of the VMS is active and you can test signing visitors in and out and refine the configuration and design of the interface.

It is possible to run both the VMS and the regular Protege GX client on the same workstation for ease of configuration. However, if changes are made in the client, the VMS will not update until it has been restarted.

## Adding Additional Pages to the VMS

It is possible to add additional pages to the sign in section of the VMS interface to display important information such as health and safety messages, or request further visitor data such as a company name.

- 1. Navigate to **Visitor | Pages** and add a new VMS Page for the relevant **Site**.
- 2. To add a notice or announcement to the page, type it into the **Note** box on the **General** tab. If the visitor is required to acknowledge that they have read the information before they can proceed, enable **Show** acknowledgment button on the page.
- 3. If you wish to request further information on the page, add custom fields in the **Custom fields** tab. These can be created in **Users | Custom fields**.
  - Custom fields will not be saved to the user record unless the same field is present on a **Custom field tab**. Ensure that any custom fields used for VMS pages have a custom field tab selected.
- 4. Navigate to Visitor | Templates. In the Pages tab, add the custom pages in the desired order.

### Adding Images to the VMS Template

If required, you can personalize the look of the VMS by adding images to be used as background images, logos and advertisement banners in the VMS template.

To add an image to the VMS template:

- 1. Navigate to **Visitor | Images** and add a new VMS image for the relevant **Site**.
- 2. Click on the ellipsis [...] button beside the Image field to open an Add Image dialogue.
- 3. By the **Path** field, click on the **ellipsis [...]** button to browse to the image location on the PC or network. Click **Next** to continue.

Alternatively, setting Image source to Topaz allows you to upload an image from a Topaz signature pad.

- 4. The image will be displayed with an overlaid selection box, allowing you to crop the image before uploading it to the Protege GX database.
  - Click and drag the selection to resize and move it until it displays the desired section of the image.
  - The **Aspect** checkbox, when enabled, forces the selection to maintain the same aspect ratio as the image. Disable this checkbox to resize the selection freely.
  - Enable the **Crop** checkbox and click **Ok** to crop the image to the selection. To proceed without cropping, do not enable the **Crop** checkbox.
- 5. **Save** the VMS image.
- 6. To add the image to the VMS template, navigate to **Visitor | Templates | Display**. Choose where the image is to be included background image, logo, sign in or out button image, or an advert image (banner at the bottom of the screen) and select it in the corresponding dropdown menu.

## Creating a Dedicated VMS Operator

While theoretically any Protege GX operator can open the VMS, it is recommended that you set up a dedicated operator login for use with the VMS only. There are a number of benefits to this approach:

- The only event that appears when a visitor signs in is "User <USER\_NAME> Added By Operator <OPERATOR\_ NAME>". Using a dedicated VMS Operator called, for example, Visitor Management System, clarifies the source and purpose of the new user.
  - Similarly, when the visitor signs out, the user record will be either modified or deleted by the Visitor Management System Operator.
- Some design elements in the VMS interface (e.g. keyboard colors) depend on the **Display theme** and **Display color** selected by the operator. With a dedicated VMS operator, the theme can be kept consistent with the rest of the VMS template design.
- Running the VMS requires specific operator permissions. A dedicated VMS operator can be given only the permissions it needs for its function.

Permission to edit users is also useful for end users and guards who interact with visitors, so they can sign visitors out manually and check their assigned credentials and estimated departure times. Permissions can be customized via **Global | Roles** as below.

#### Creating and Configuring the Operator

To create a dedicated VMS operator, it is necessary to create a Role with only the permissions required to operate the VMS: edit permissions for the **User** and **Visitor** menus. Since the Visitor table is not a standard table in the software, granting edit access requires creating an Administrator Role, then removing all permissions that are not required for the VMS.

- 1. In Protege GX, navigate to **Global | Roles**. Create a new role for the VMS operator.
- 2. Set the role **Preset** to Administrator. This gives the operator permission to view and edit the Visitor table (necessary for assigning visitor cards).
- 3. Other access should be restricted with the following settings:
  - In the **Tables** tab set the following permissions:
    - Operators: Read only
    - Card template editor: Read only
    - Custom fields: Read only
    - Users: Full access
    - Remove all other listed permissions by setting every dropdown to Deny.
  - In the **Sites** tab, select the site that the VMS operator will have access to.
  - In the **Display** tab, disable all popup settings.
- 4. It is necessary to create and assign a security level to more precisely restrict the VMS operator's access. In the **Security level** tab, click **Add**, then the ellipsis [...] button to open **Sites | Security levels** in a breakout window.
- 5. Create a new security level for the relevant site, with the following settings:
  - In the **Tables** tab, set the following permissions:
    - PhotoID: Full access
    - Users: Full access
  - Set all other fields in the **Tables** and **Manual commands** tabs to Deny.
- 6. Return to the **Global | Roles | Security levels** programming. Click **Add**, select the **Site** and **Security level** and enable **Access all record groups**. Click **Ok**.

Now there is a Visitor Management role which only has access to the visitor and user fields for the selected site.

- 7. Navigate to **Global | Operators** and create a new operator. This should have an informative name (including the site name if relevant), as it will appear in the event reporting.
- 8. Set a **User name** and **Password** for the VMS operator.
- 9. Set the **Role** to the role created above. Clicking on the ellipsis will display a table with the operator's (limited) access permissions.

#### 10. Test the VMS operator's capabilities:

- Now that the VMS operator has been created, use it to log in to the normal Protege GX client (not the visitor management system). Confirm that it can access and edit the **User** and **Visitor** menus, but not anything else important.
- On the **Home** page, set the **Display theme** and **Display color** to match the design of the VMS template.
- Close the client and log in to the VMS using the VMS operator. Test the operation of the VMS to ensure that the VMS operator can successfully sign visitors in and out of the system.

## Troubleshooting VMS Issues

This section describes a number of common issues which may arise when setting up the VMS, and gives possible causes and solutions.

- **Issue**: I cannot proceed from the sign-in page. Pressing **Next** has no effect.
  - The likely cause is that there are no users who support visitors. Visitors are required to enter the "person you are here to visit", and cannot proceed if there are no users configured to support visitors. Select some users and enable the **User supports visitors** checkbox in the **Users | Users | Visitor** tab.
- Issue: After pressing Next, I am presented with a blank screen. Only the Back and Cancel buttons are available.
  - The VMS template has probably been configured to require a photo, but there is no webcam available to take the photo. Either set up a default webcam for the workstation, or disable the **Photo required** option (**Visitor | Templates**).
- Issue: When I press Print card, nothing happens.
  - The VMS template probably does not have a card template assigned. Create an appropriate card template (see page 8) and set it in **Visitor | Templates**.
- Issue: When I press Print card, I receive an error that reads "No more cards left."
  - This usually means that all VMS cards are marked as 'in use', and therefore there are none available to assign to visitors. Ensure that there are enough VMS card records available (in **Visitor | Cards**) for the maximum number of visitors that are expected to be on site at any given time.
  - This error is also displayed when the **Download user to controllers** option (**Visitor | Templates**) is disabled (even if there are VMS cards available). This option must be enabled for the VMS to function correctly.
- Issue: When I press Print card, I receive an error that reads "Save Card Error: Duplicate Facility/Card Number."
  - This can occur when one of the visitor cards has been assigned to someone manually within Protege GX. This means that the **Card in use** box (in **Visitor | Cards**) has not been checked. Usually this can be fixed by pressing **Print card** a second time. The VMS will mark the first card as 'in use', and progress to the next card in the list.
- Issue: When I press Print card, I receive an error that reads "Error! Access Denied."
  - The VMS operator does not have the correct permissions to edit user records, and therefore cannot create a record for the visitor. Ensure that it has full access to user tables (see page 10).
- **Issue**: When I sign a visitor in with the VMS, they are assigned a credential but the VMS card does not have the **Card in use** checkbox checked.
  - The VMS operator does not have the correct permissions to edit VMS card records. Ensure that it has full access to visitor tables (see page 10).

## Appendix: VMS Template Settings

#### General Tab

- **Card template**: The design template used to print labels or cards for visitors. This is required for the visitor management system to function, and may include elements such as visitor details, credentials, a user photo, and bar code for quick sign out. Card templates can be programmed in **Users | Card template editor**.
- Checkout mode: Set what happens to the user record created for a visitor when they sign out of the VMS.
  - Disable user will remove the credential from the visitor's user record.
  - Delete user will delete the user record.

Disabled visitors are not reactivated if they sign in to the VMS again: a duplicate record will be created. However, the visitor can be 'reactivated' by manually assigning them a credential in Protege GX.

- **Requires validation**: This option is not used.
- **Card template**: The design template used to print labels or cards for visitors. This is required for the visitor management system to function, and may include elements such as visitor details, credentials, a user photo, and bar code for quick sign out. Card templates can be programmed in **Users | Card template editor**.
- **Stretch photo to fill**: When this option is enabled, visitor photos will be stretched to fit the full space allotted in the card template. This will not preserve the aspect ratio, which may result in distorted images.
- **Download user to controllers**: This option must be enabled for correct operation of the VMS.
- **Show print dialogue**: If this setting is enabled the VMS will show a print dialogue, allowing the user to select a printer for the visitor label. If it is disabled, the computer's default printer will be used. This option is useful for testing as it allows you to cancel the printing of any labels.
- **Show maximize button**: When this option is enabled the VMS interface will include maximize, minimize and close buttons. The ICT logo will be displayed in the top left.
- **Maximize window**: Enabling this option ensures that the VMS window will be automatically maximized, regardless of the settings of the workstation.
- **Email exceptions**: This option is not used.
- Sign Out Options:

One or both of these options can be used.

- **Scan bar code**: The visitor will be required to scan a bar code on their printed label to sign out. Bar codes can be added to labels in the card template.
- **Select name from drop down**: The visitor will be prompted to select their name from a drop down menu to sign out.
- **Automatic**: This option is not used.

#### Pages

• VMS pages: Add additional custom pages to the VMS sign in process. These can include additional information or custom fields for input. VMS pages can be created in Visitor | Pages.

#### Email

• **Operators**: All operators added to this section will receive emails whenever a visitor signs in using this VMS template.

Automated email features in Protege GX require an SMTP mail server to be configured in **Global | Global settings | Email settings**. Each operator must have an email address entered under **Global | Operators**.

#### Display

This tab allows you to customize the colors, borders and images displayed by the VMS interface.

- **Images**: Select images for the background, logo, sign in/out buttons and advert images. Click the ellipsis [...] button to navigate instantly to **Visitor | Images** to add any required VMS images.
  - Background image: Displayed as the background for all screens in the VMS. This will override the Background color setting.
  - **Logo**: Displayed above the sign in/out buttons, horizontally centered.
  - **Sign in/out image**: Displayed above the text in the sign in/out buttons respectively.
  - **Advert image 1-4**: Displayed at the bottom of the VMS home screen. This option can be used to add up to four advertisement banners to the VMS interface. If multiple advert images are configured, the home page will cycle through the different images over time.
- Colors: Enter the desired color as a hex code, or click the ellipsis [...] button to open a color picker.

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