EasyLobby® SVM® 10.4
Installation, Administration and User Guide

PLT-03258 Rev A.0

January 2018
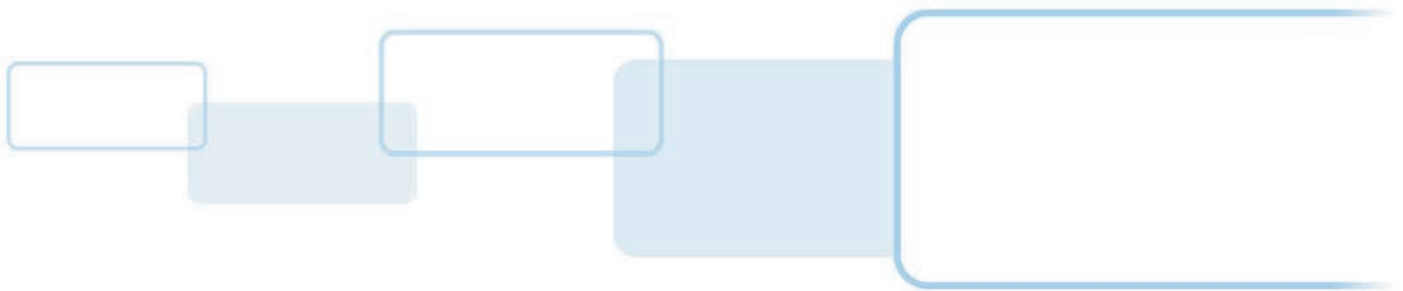
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Revision History

Date	Description	Version
January 2018	Initial release.	A.0

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Contents

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Section 1

Introduction

1.1 What's on the DVD?

The following folders are included on the DVD.

1.1.1 Devices

Contains subfolders for each of the associated hardware options. The subfolders contain the driver and ReadMe files for installing the hardware.

1.1.2 Documentation

This folder includes, but is not limited to:

- *EasyLobby SVM 10.4 Product Suite General Product Specification* (PLT-03261)
  Describes the various products within the EasyLobby suite.

- *EasyLobby eAdvance 10.4 Installation and Administration Guide* (PLT-03263)
  Contains instructions on configuring the eAdvance website.

- *EasyLobby SVM 10.4 Installation, Administration and User Guide* (PLT-03258)
  This manual; the main installation and user guide for EasyLobby.

- *EasyLobby SVM 10.4 Release Notes* (PLT-03456)
  Details about the changes and improvements in this version of EasyLobby.

1.1.3 Installs

Contains the install files for the EasyLobby® products: SVM®, Administrator, Satellite, and eAdvance. These can be used to run individual application installers without using the main setup.exe menu.

It also contains the install files for SQL Server 2014 SP1 Express Edition, a more robust database than Microsoft Access. SQL Server is recommended for installations where the database is shared over a network.

1.1.4 Integrations

Contains install files and guidance for using EasyLobby in conjunction with many access control systems. Please note that access control integrations require additional licensing.

1.1.5 SQL

Contains SQL scripts that might be required for manually setting up EasyLobby to run with Microsoft SQL Server or Oracle databases.

1.1.6 Training

Contains additional videos and help material for EasyLobby and popular hardware.

1.1.7 Updates

Contains program updates for the EasyLobby software products.

1.1.8 Utilities

Contains folders for:

- **Additional Software**: Additional computer software that may be required if not already present on your computer.
- **Authenticate**: A utility used to change default authentication methods for connecting to EasyLobby.
- **DBMigration**: Files to convert older EasyLobby database files to the current EasyLobby format. The utility can also be used to migrate a Microsoft Access EasyLobby database into a SQL Server or Oracle relational database.
- **EmployeeImport**: A utility that can import employees into EasyLobby when supplied with an existing compatible document, such as a .csv file.
- **PhotoExport**: A utility that exports photos from employee, visitor, and watch list records within EasyLobby.

1.2 EasyLobby solution overview

EasyLobby SVM: Makes it easy for reception desk staff to record information about visitors and support your security requirements. They can enter information quickly and print visitor badges effortlessly.

Administrator: Provides enterprise-class central administration of your system. For example, you can set up user names and passwords, set global field options, customize self-registration options, and do monitoring and reporting.

EasyLobby eAdvance (requires additional license): Allows authorized employees (or tenants in the case of office or residential buildings) to preregister a visitor over the internet or intranet from a web browser. The employee or tenant simply logs onto a web page (running on the eAdvance web server) and completes a simple visitor information form. No knowledge of how to use EasyLobby SVM is required, and no training of employees is necessary. The information from the visitor form is automatically entered into the EasyLobby SVM database.

EasyLobby Satellite (requires additional license): Used to control and monitor entry and exit at one or more internal locations or "check points" for visitors who have already been badged at an EasyLobby SVM workstation at the main lobby, visitor center, or guard gate. Upon arrival at a satellite station, the visitor badge is scanned (via barcode) and the satellite station displays the visitor's photo, name and clearance level and immediately informs you whether to allow the visitor entry into that area or to deny entry. The clearance level is assigned to each visitor when they are badged by EasyLobby SVM. The satellite time stamps the visitor's entry and exit.

Note: Throughout this manual, 'EasyLobby' is used to refer to the EasyLobby software suite. Where necessary, the terms 'EasyLobby SVM', 'Administrator' and 'Satellite' will be used to distinguish the applications.

1.3   Further help

On the menu, click **Help** > **EasyLobby web site**.

1.4   Using this manual

Menu commands are shown with arrows in this manual. For example, if you read "Click **Visitor** > **New**" this means you should click **Visitor** on the menu bar and then click **New** on that menu.

Bold text is used to highlight menu items, button names and window titles.

There are four user levels in EasyLobby which determine what actions are allowed by the user:

- **Novice**: Used by new EasyLobby users and temporary reception desk staff. Novices can enter new visitors, check visitors in and out, print badges, and do visitor log lookups.
- **Operator**: Used by most reception desk staff. In addition to novice tasks, operators can add events and view log properties.
- **Manager**: Used by those who will create visitor reports. In addition to operator tasks, managers can open logs, add and modify employee information, backup and restore logs, set preferences, and run reports.
- **Administrator**: Used by those who install and set up EasyLobby. In addition to manager tasks, administrators can create new logs, manage networked visitor logs using Administrator, and can import and export log information.

1.4.1   Sections

- Section 2 describes the installation of the software and the SQL or Oracle database. This section should be read in the correct sequence to ensure appropriate installation methods are used.
- Section 3 is for system administrators, and describes the configuration options.
- Sections 4-11 are for reception staff who will use the software.
- Appendix A contains additional technical details for system installers and administrators.

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Section **2**

Installation

2.1 Introduction

Before you install the EasyLobby software, check that your computer meets the system requirements shown below.

2.1.1 System requirements

Computers on which you install EasyLobby SVM or Satellite software should meet the following minimum requirements:

- PC running Windows Server (2008, 2012, or 2016), Windows 7, Windows 8.1 or Windows 10
- 4 GB RAM
- 500 MB of free hard disk space
- DVD-ROM drive. Please contact HID if you require a digital download link.
- MAPI mail client (optional)
  To use the email notification feature with MAPI instead of the built in SMTP mail sending facility.

2.1.2 Write permissions

For proper operation, EasyLobby client applications (EasyLobby SVM and Administrator) require that the logged in Windows user has write permission for the EasyLobby installation folder (and subfolders). This is typically C:\Program Files (x86)\EasyLobby\EasyLobby SVM 10.0 unless you selected a different installation folder during installation.

You can check or assign this write permission by using Windows Explorer to access the EasyLobby installation folder. Right-click the **EasyLobby SVM 10.0** folder and click **Properties** on the pop-up menu. Click the **Security** tab, and then click **Edit**. In the **Group or user names** section, select the user account or security group to whom you would like to give access. In the **Permissions for Users** box, assign either **Full Control** or at least **Write** permission.

The most permissive option is to add the **Everyone** group and give them full control. You may instead add the **Users** group and give them **Write** permission. A more precise approach might be to create a special security group, for example **EasyLobby Users**, add this group with full control, then make all Windows users that use the EasyLobby software members of this group.

In addition, if you are using a ScanShell 1000 or 1000-A scanner (for driver's licenses or passports) and you are using the option to extract the photo from the license or passport, the Windows user that is logged in must have write permission for the system temporary folder.

To check the location of your system temporary folder in Windows 10:

1. Open Control Panel and click **System** > **Advanced system settings** > **Environment Variables**.
2. In the **System variables** section, check the value of the TMP and TEMP variables. The term %USERPROFILE% indicates your user profile folder, typically C:\Users\<username>. If you are using the ScanShell 1000-A, permission is also required for the C:\Windows\twain_32 and C:\Syscan folders.

2.1.3   Regional and date settings

Date formats are determined by your selections in the Windows Regional Settings. Years follow the rules defined in the Regional Settings of your Windows Control Panel to determine what century they are in. By default, years from 00 to 29 are interpreted as 2000 to 2029.

2.2   Hardware installation

The following hardware can be used with EasyLobby. You can install hardware before or after you install the EasyLobby software. Many drivers and utilities are provided in the Devices subfolder on the EasyLobby DVD, or within the EasyLobby installation folder. If there are no suitable files for your device, install it according to the manufacturer's instructions.

EasyLobby supports a wide range of scanners and printers including, but not limited to:

- Badge printing: All Windows compatible printers, including:
  DYMO LabelWriter™ 450 Turbo
  HID FARGO® card printers
  Laser printers
  Inkjet printers
  Hard card printers

- Photo capture:
  Any TWAIN or Video for Windows compatible web image capture device (webcam, flat-bed scanner, etc.). Digital cameras are not typically supported.

- Business card scanners:
  Acuant ScanShell® 1000
  Acuant SnapShell® R2

- Driver's license readers:
  Acuant ScanShell 1000
  Acuant SnapShell R2
  Acuant/AssureTec ARH Combo Smart
  Acuant/AssureTec ARH Combo Smart A
  Acuant/AssureTec ID-150
  Acuant/AssureTec ID-150A
  Intellicheck DCM/IM2000/IM1200+

- Proximity card scanner:
  RF Ideas pcProx RDR-80081AK0

- Barcode scanners:
  Honeywell Voyager 9520.

- Signature capture
  Topaz® SignatureGem® LCD 1x5 SigPad
  Topaz SignatureGem LCD 4x5 SigPad

2.2.1   Install an Acuant ScanShell or SnapShell R2 device

Drivers are included on the EasyLobby DVD:

1. Close EasyLobby.

2. Plug the scanner into a USB port.

3. When the "Found New Hardware" window notice is displayed, locate the drivers located in the ScanShell folder within the EasyLobby installation folder.

4. Enable the scanner in EasyLobby; see *Section 3.6.1.1: ScanShell/Snapshell tab*.

2.2.2   Install an Intellicheck DCM/IM2000/IM1200+

For serial cable connections, no drivers are needed. Connect the license reader to an available COM port and select the type of reader and COM port in EasyLobby. See *Section 3.6.1.2: Intelli-Check tab*.

For USB connections, drivers are included on the EasyLobby DVD in the Intelli-Check DCM subfolder.

1. Close EasyLobby.
2. Connect the license reader to an available USB port. Windows plug-and-play should recognize that a new device is present. Locate the Intelli-Check DCM folder and allow Windows to install the drivers from that folder. Note that after installing the first driver, if you are prompted to install a second driver, select the same temporary folder.
3. The Intellicheck DCM/IM2000/IM1200+ drivers make the license reader look like a COM port to the Windows operating system. After installing, you must use Windows Device Manager to determine on which COM port the DCM was placed:

   a. Open Control Panel and click **System** > **Device Manager**.

   b. Expand the **Ports (COM & LPT)** item. Locate the item called USB Serial Port (COMx). Note the actual COM port number, for example, COM5.

   c. In EasyLobby, select the type of reader and select the COM port; see *Section 3.6.1.2: Intelli-Check tab*.

2.2.3   Install a barcode scanner

A barcode scanner is normally detected by Windows as a standard human interface device.

1. Plug the barcode scanner into the computer.
2. The human interface driver automatically installs.
3. Scan the necessary barcodes in the scanner's user manual to set a preamble string of F12, and Code 128.

2.2.4   Install a business card scanner

1. Close EasyLobby SVM.
2. Install the software included with the device or on the EasyLobby DVD.
3. When the install is finished, plug the scanner into a USB port; the drivers install automatically.
4. Enable the scanner in EasyLobby; see *Section 3.6.2: Business Card tab*.
5. Click **Configure Scanner** to calibrate and test.

2.2.5   Install a signature capture device

Complete setup instructions for the Topaz signature scanners are included on the EasyLobby DVD.

2.2.6   Install a fingerprint scanner

Complete setup instructions for the M2SYS fingerprint/palm/vein scanners are included on the EasyLobby DVD.

2.3   Software installation

Setting up the EasyLobby software includes the following steps:

1. Install EasyLobby SVM (page 20)
2. Install Administrator (page 24)
3. Install the database (page 29)
4. Set up company information, sites, and stations (page 64)
5. Set up users (page 66)
6. Program options (page 71)
7. Badge options (page 117)
8. Device options (page 117)
9. Import data (page 132)
10. Categories (page 143)
11. Reasons for a visit (page 145)
12. Signature types (page 146)
13. Alerts (page 147)
14. Clearance (page 156)
15. Parking lots and spaces (page 157)
16. Conference rooms (page 158)
17. Vehicle types (page 159)
18. Use EasyLobby on a network (page 160)

These steps will allow you to customize EasyLobby with your company information, logo, employee information, default information, custom fields and field names, visitor categories, reasons, camera and security settings, and choose and customize badge templates.

2.3.1   Self-registration installations

A *self-registration station* displays only a simplified registration screen to the visitor or employee. This is not a separate application, but a special display mode of EasyLobby SVM, so the full application must be installed as normal on the self-registration station. See *Section 2.4: Install EasyLobby SVM*. To use self-registration mode, see *Section 4.2: Self-registration mode*.

2.4 Install EasyLobby SVM

Use the EasyLobby DVD to install EasyLobby SVM on each computer where it's required. You must use a different license key for each computer running EasyLobby SVM.

Follow the instructions on the installation screens to complete the installation.

1. Close all other Windows applications that are running.
2. Insert the EasyLobby DVD into the DVD-ROM drive on the computer. If the menu screen does not appear automatically, run setup.exe from the root folder on the DVD.
3. Click **EasyLobby SVM** and click **Install**.
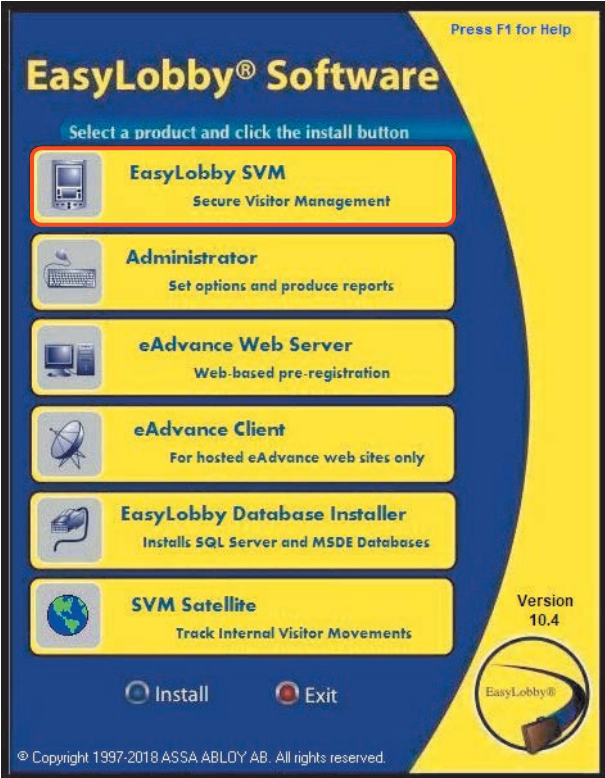
4. Select your language and click **OK**.
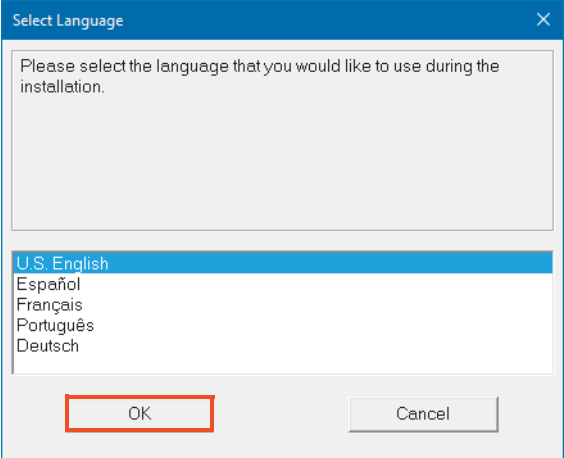
5. Type the license key from your EasyLobby software package and click **OK**.
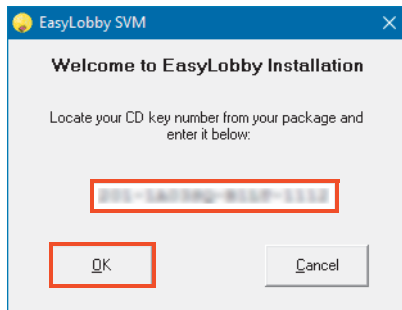
6. Exit all Windows programs that are running, read the warning, and click **Next >**.
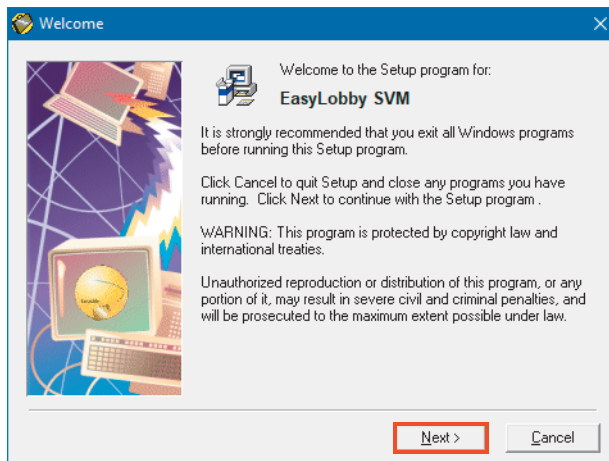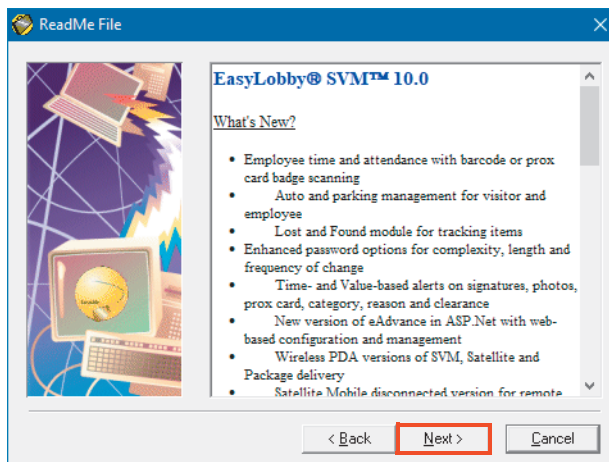
7. Read the information and click **Next >**.

8. Click **Yes** to accept the license terms and continue the installation.
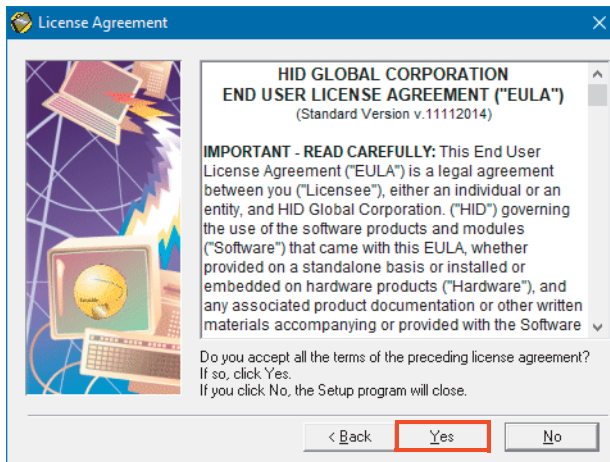
9. The **Choose Destination Location** window determines where to install EasyLobby SVM. The default on 64-bit Windows is C:\Program Files (x86)\EasyLobby\EasyLobby SVM 10.0. Click **Browse** to choose an alternative folder, or click **Next >** to accept the destination folder.
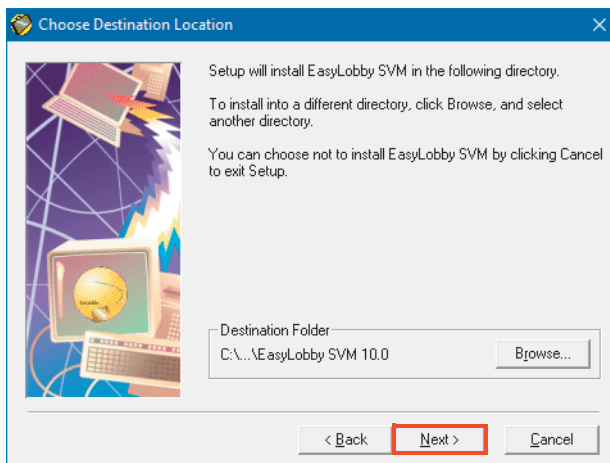
10. Click **Next >** to begin the installation of EasyLobby SVM.
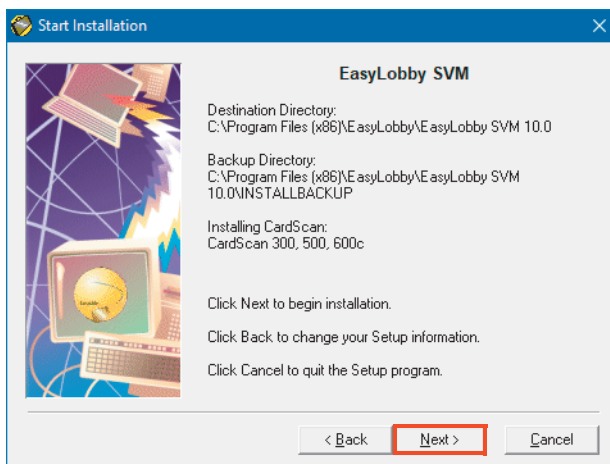
The **Installing** window shows the files installed and the blue bars indicate their progress.
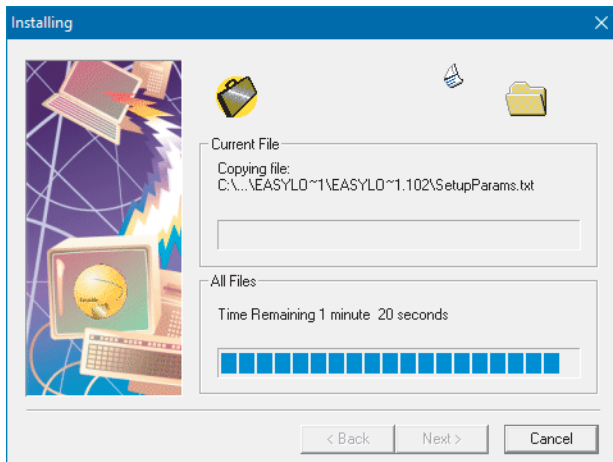
The EasyLobby support files are registered on the computer.
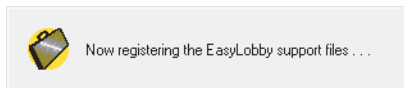
11. When the **Installation Complete** window is displayed, click **Finish >**.
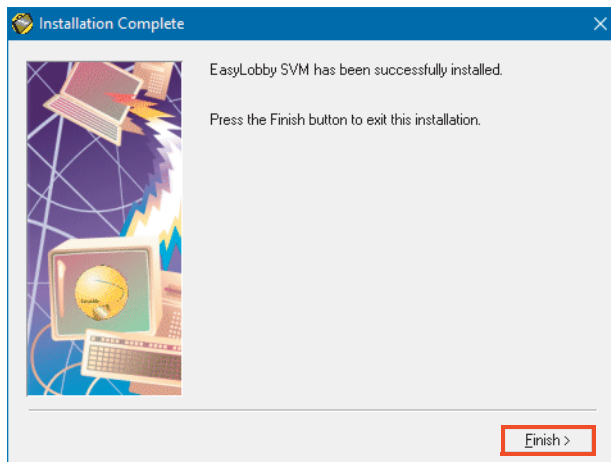
12. The **Install** dialog might display a message requiring the computer to be restarted to complete the installation. Click **OK** to restart the computer or **Cancel** to return to Windows without restarting:
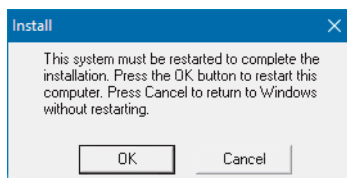
Note: EasyLobby SVM requires a login. The first time you open EasyLobby SVM, login as 'Admin' or 'Administrator' with the password 'pass'.

2.5   Install Administrator

Administrator is typically used for database administration, settings configuration, and real-time monitoring and reporting functions performed from a remote workstation.

Use the DVD to install Administrator on the computer where EasyLobby will be administered (where global setting changes will occur). This computer can be any computer on your network, provided it has access to the visitor database file.

1. Close all other Windows applications before running the setup program.
2. Insert the EasyLobby DVD into the DVD-ROM drive on the computer. If the menu screen does not appear automatically, run setup.exe from the root folder on the DVD.
3. Click **Administrator** and click **Install**.
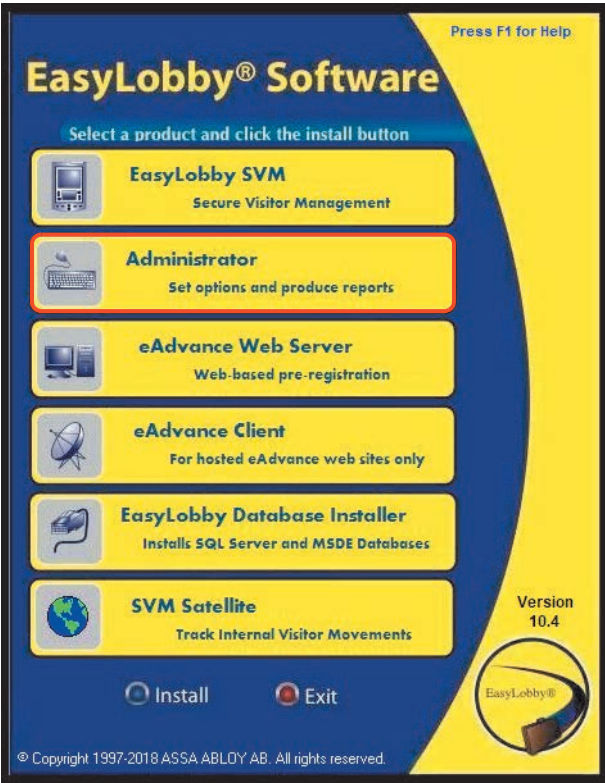
4. Select your language and click **OK**.
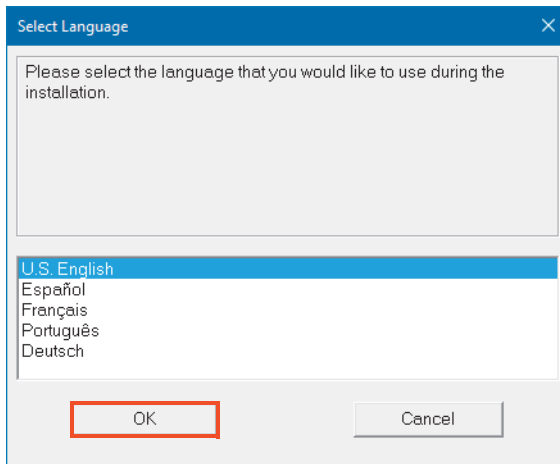
5. Type the license key from your EasyLobby software package and click **OK**.
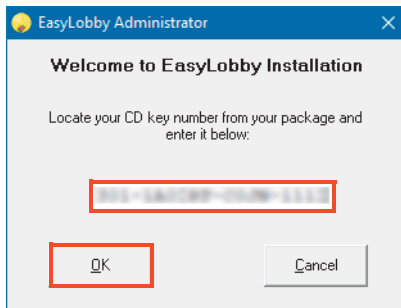
6. Read the warning and click **Next >**.
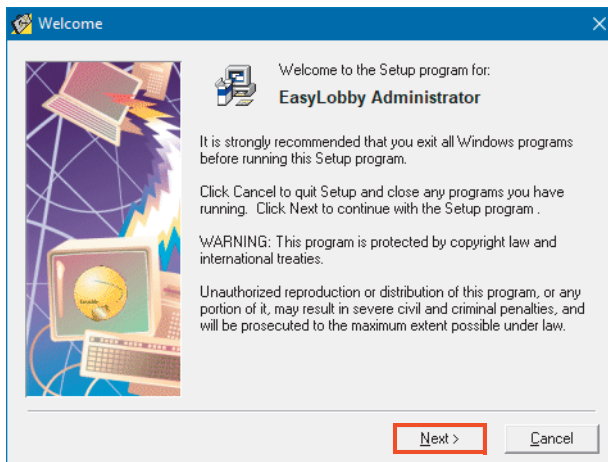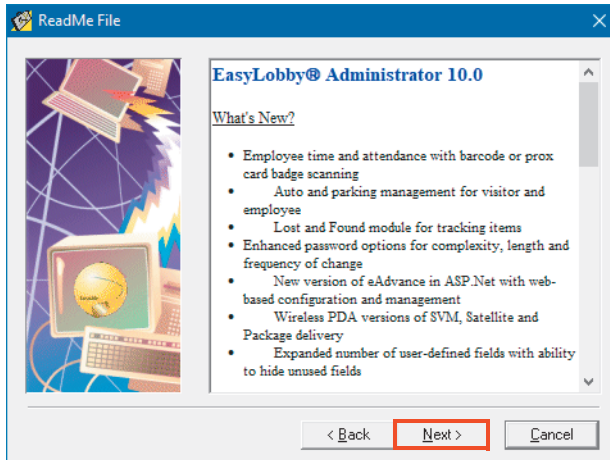
7. Read the information and click **Next >**.

8. Click **Yes** to accept the license terms and continue the installation.
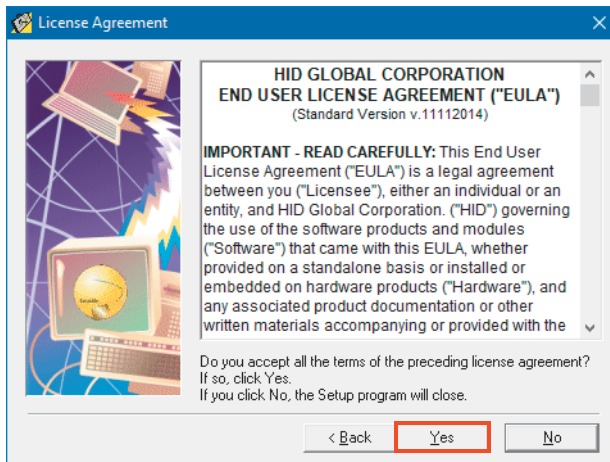
9. The **Choose Destination Location** window determines where to install Administrator. The default on 64-bit Windows is C:\Program Files (x86)\EasyLobby\EasyLobby SVM 10.0. Click **Browse** to choose an alternative folder, or click **Next >** to accept the destination folder.
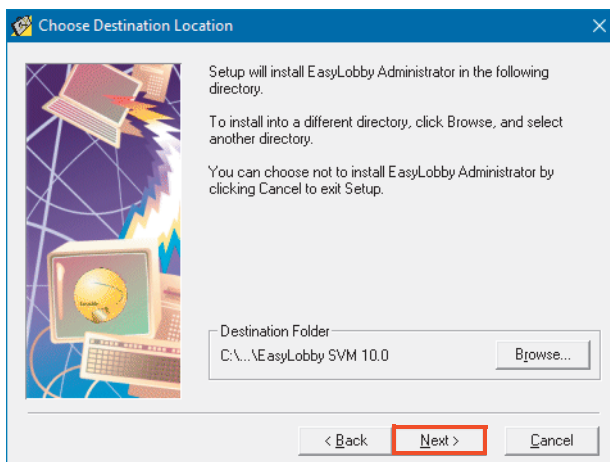
10. Click **Next >** to begin the installation of Administrator.
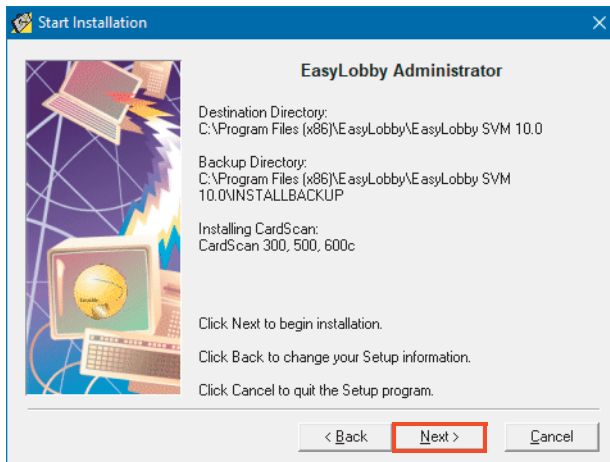
The **Installing** window displays the files installed and the blue bars indicate their progress. The installation times are overestimated.
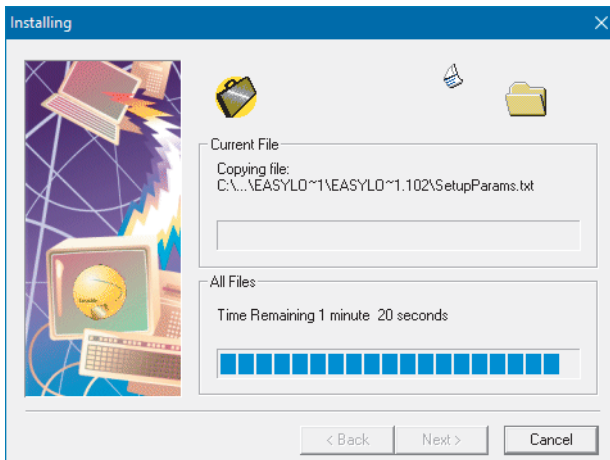
The EasyLobby support files are registered on the computer.
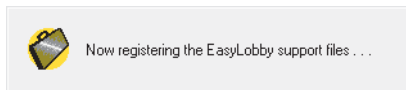
11. When the **Installation Complete** window is displayed, click **Finish >**.
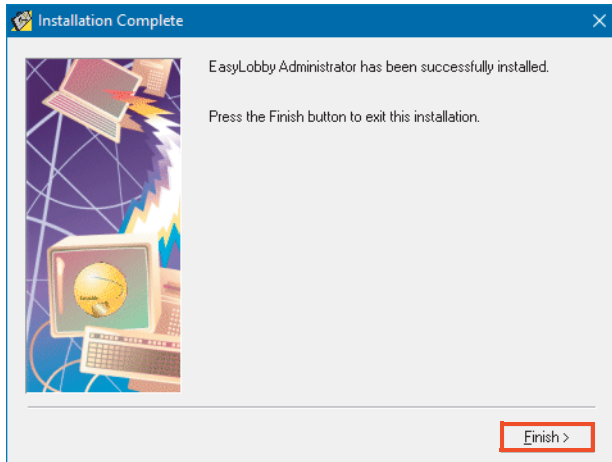
2.6   Install the database

EasyLobby SVM 10.4 supports Microsoft SQL Server and Oracle relational databases with ODBC support. This includes:

- Microsoft SQL Server is recommended. EasyLobby supports versions 2008, 2012, 2014 and 2016, both licensed and free (Express) versions.
- Oracle database server versions 9i or higher are supported. Each client workstation also requires the Oracle client 9.0.2 or higher including the Oracle Provider for OLE DB. If you wish to use an existing Oracle database installation, go to *Section 2.10: Install an Oracle database*.

2.6.1   Check for an existing Microsoft SQL database

If you wish to use Microsoft SQL Server (recommended) it is important to check if your computer already has Microsoft SQL Server installed.

1. Open Windows Explorer.
2. Open the **C:\Program Files** folder.
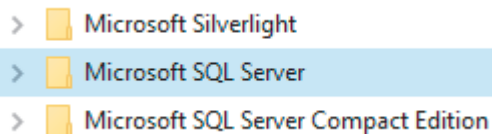
- If you see no **Microsoft SQL Server** folder, go to *Section 2.7: Install a new Microsoft SQL Server 2014 Express database*.
- If you see only a folder called **Microsoft SQL Server Compact Edition**, ignore it since it cannot be used by EasyLobby. Go to *Section 2.7: Install a new Microsoft SQL Server 2014 Express database*.
- If you see a folder called **Microsoft SQL Server**, then it is already installed. You must now check if it is a 32-bit or 64-bit installation.

  Open SQL Server Configuration Manager.

  - If you see the existing database listed under **SQL Server Network Configuration (32bit)**, go to *Section 2.8.1: Use an existing 32-bit Microsoft SQL Server*.

  - If you see the existing database listed under **SQL Server Network Configuration**, go to *Section 2.8.2: Use an existing 64-bit Microsoft SQL Server*.
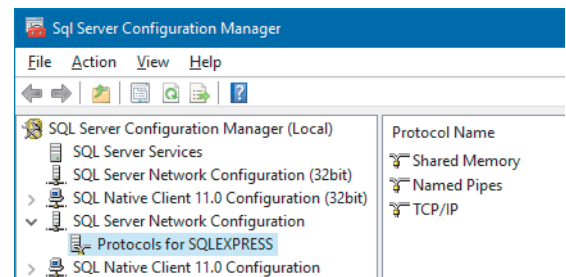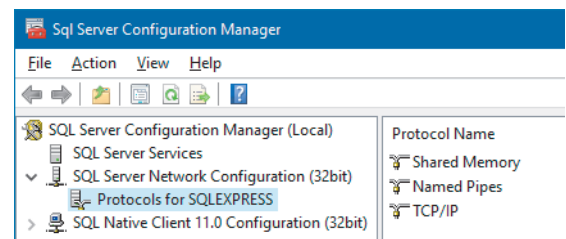
2.7   Install a new Microsoft SQL Server 2014 Express database

1. Insert the EasyLobby product DVD into the computer that will be your database server. Select **EasyLobby Database Installer** and click **Run**. If the EasyLobby product installation window (shown below) does not appear automatically, run Setup.exe from the root of the DVD.
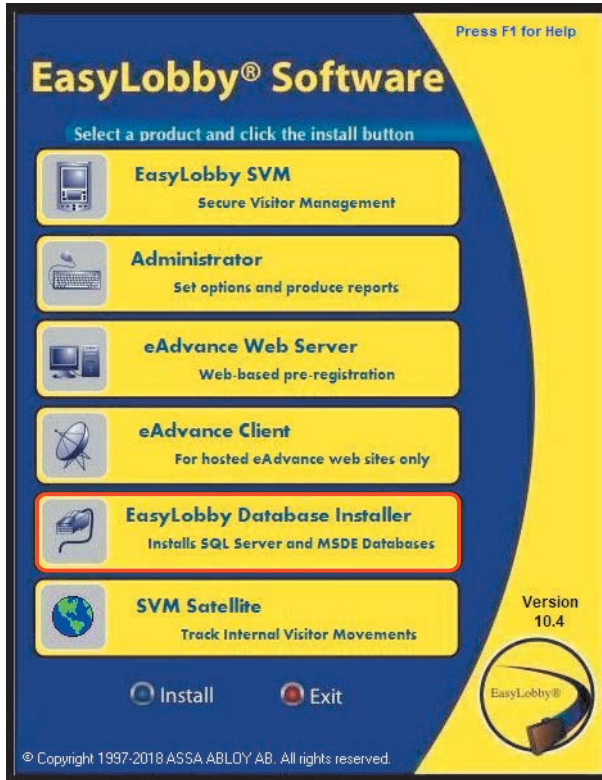
2. The initial splash screen is displayed. Click **Next >**.
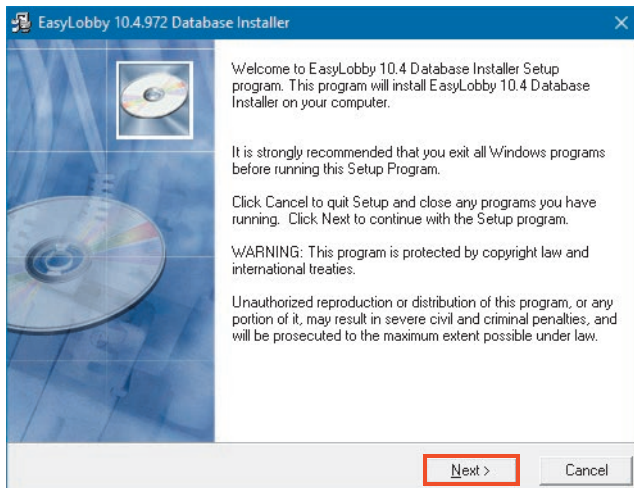
3. On the **Select Target Database** window, select **New SQL Server 2014 SP1...** and click **Next >**.
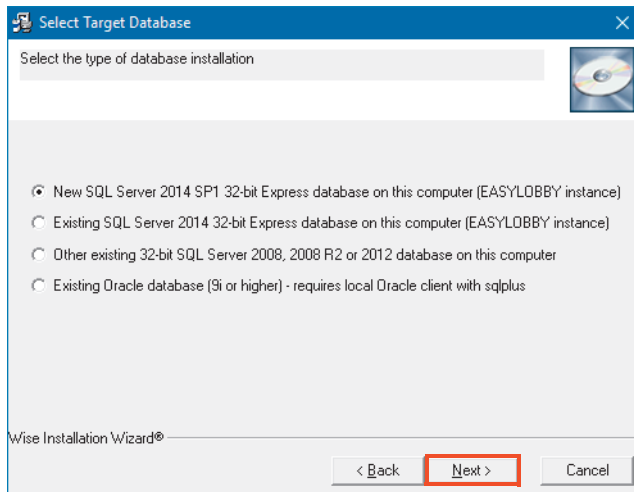
4. Review the installation information and click **Next >** to start the installation.
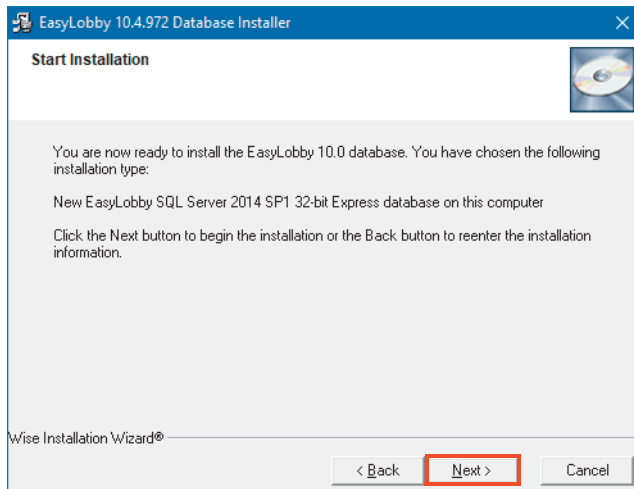
5. Allow up to a minute for the installation to complete. When the installation of the database has finished, click **View Log** to review the results of the database installation script.
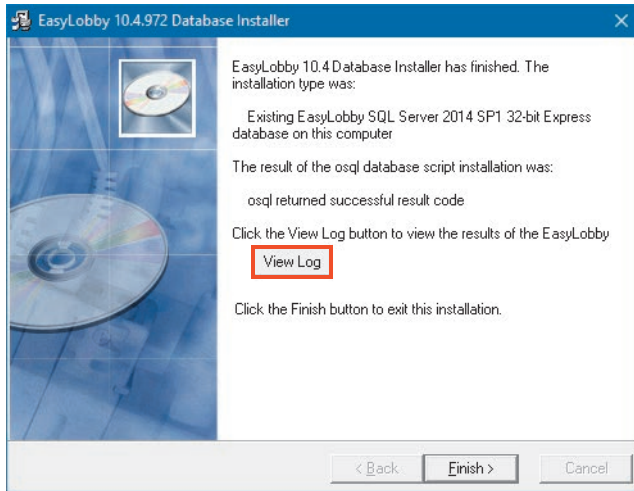
Verify that error messages are not displayed in the log. These appear as lines of readable text amongst the digits. If the log is displayed with no error messages, your database should be successfully installed. The installation creates a new SQL Authentication account named easyuser10 and a new database catalog named EasyLobby10. The easyuser10 account has database owner (dbo) rights on the EasyLobby10 database.
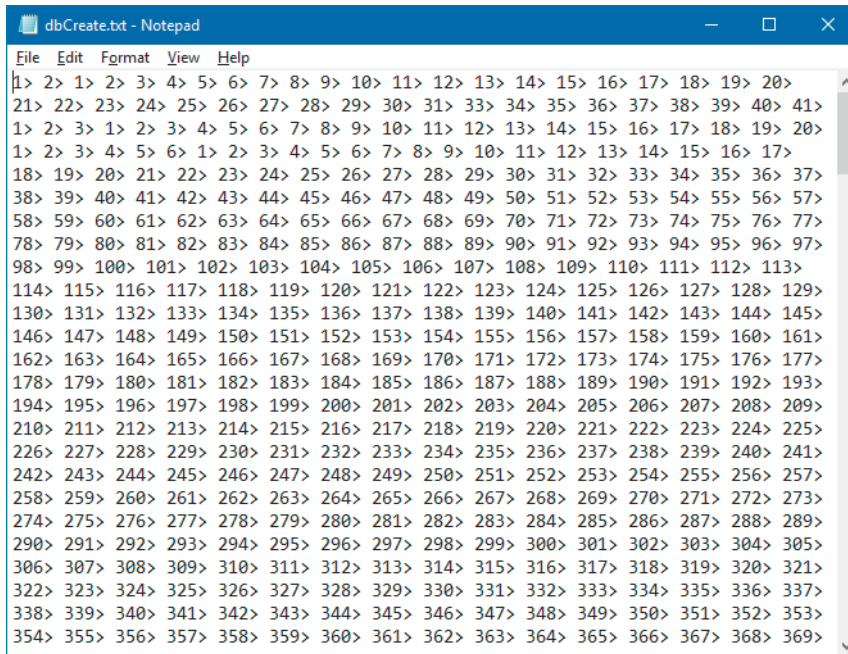
6. Go to *Section 2.9: Set up a SQL Server ODBC data source on each client computer*.

2.8 Use an existing Microsoft SQL Server

Note: You do not need to complete this section if you have installed the database using the method described in *Section 2.7: Install a new Microsoft SQL Server 2014 Express database*.

The Microsoft SQL Server folder that you found in *Section 2.6: Install the database* means you already have a 32-bit or 64-bit installation of Microsoft SQL Server. A different procedure is required to install the EasyLobby database into an existing 32-bit or 64-bit installation.

- In SQL Server Configuration Manager, if you see the existing database listed under **SQL Server Network Configuration (32bit)**, go to *Section 2.8.1: Use an existing 32-bit Microsoft SQL Server*.

- In SQL Server Configuration Manager, if you see the existing database listed under **SQL Server Network Configuration**, go to *Section 2.8.2: Use an existing 64-bit Microsoft SQL Server*.

2.8.1 Use an existing 32-bit Microsoft SQL Server

1. Insert the EasyLobby product DVD into the computer that will be your database server. Select **EasyLobby Database Installer** and click **Run**. If the EasyLobby product installation window (shown below) does not appear automatically, run Setup.exe from the root of the DVD.
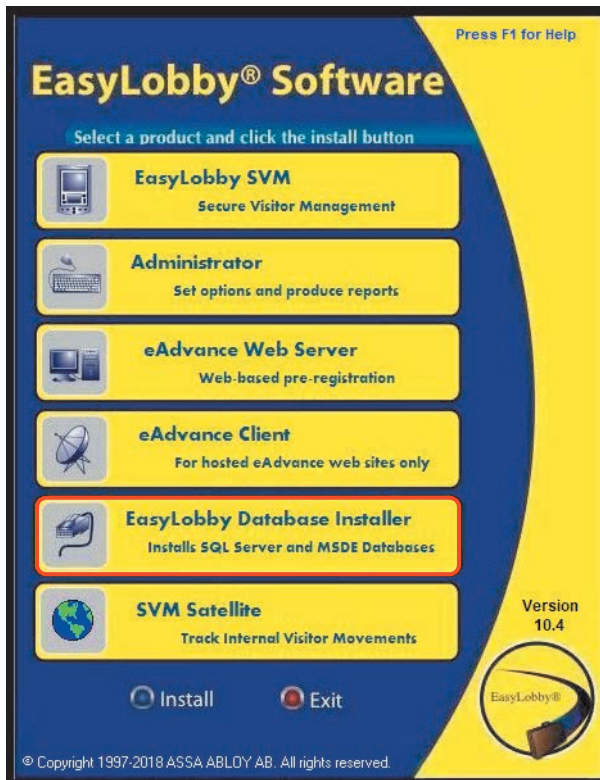
2. The initial splash screen is displayed. Click **Next >**.
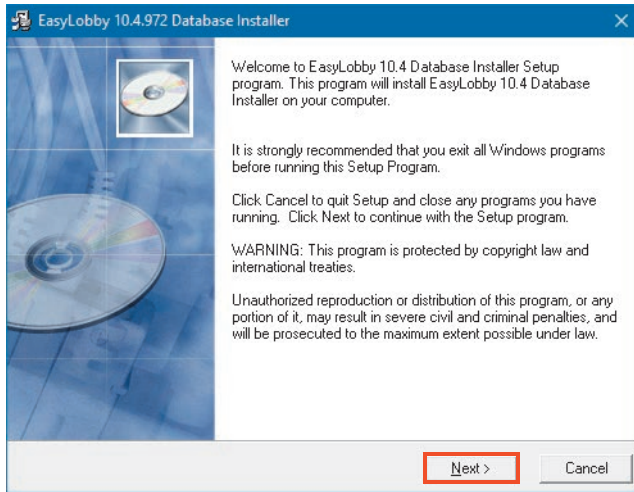
3. On the **Select Target Database** window, select **Other existing 32-bit SQL Server**... and click **Next >**.
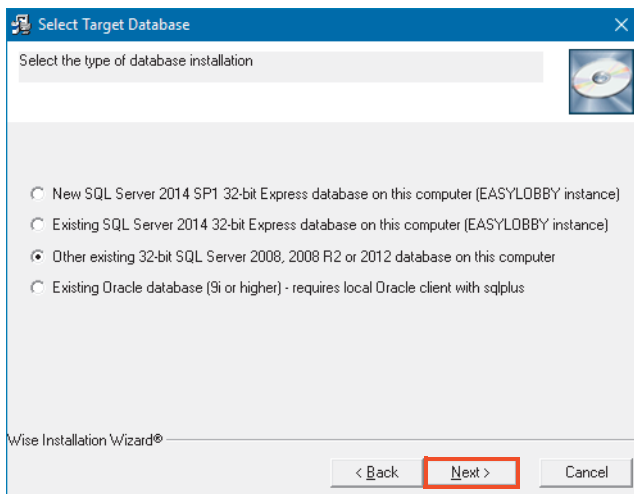
4. The **SQL Server Instance and Credentials** window requires the name of the existing SQL server.
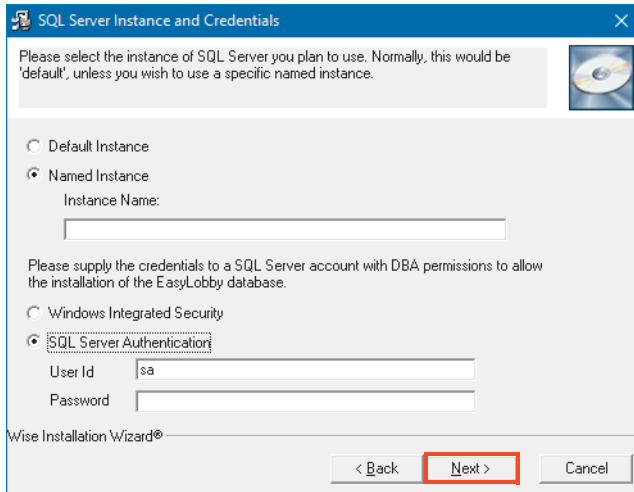
5. Open SQL Server Configuration Manager, and look for the existing SQL server name, for example SQLEXPRESS.
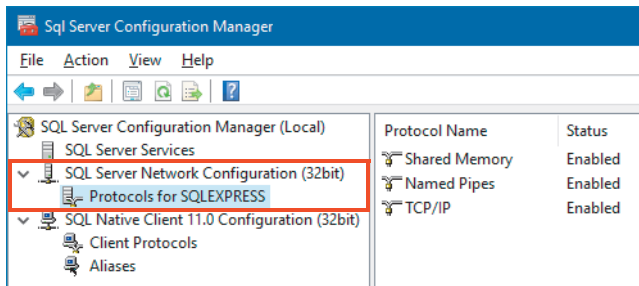
6. In the **SQL Server Instance and Credentials** window, select **Named Instance** and type the name of the existing SQL server.
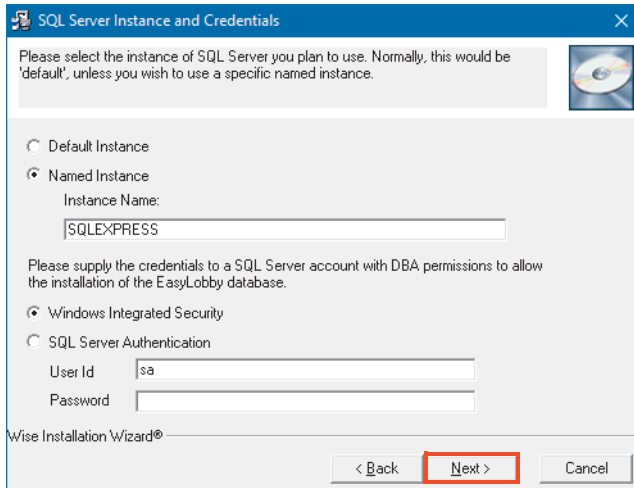
7. Select **Windows Integrated Security** and click **Next >**.
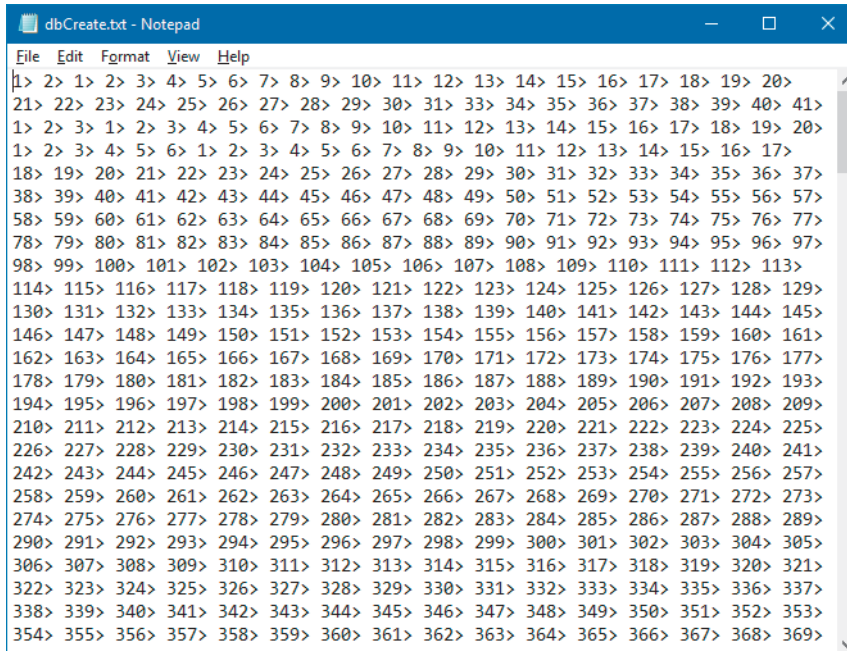
8. The **Start Installation** window is displayed immediately before the actual installation is ready to start. Review the installation information and click **Next >** to start the installation.
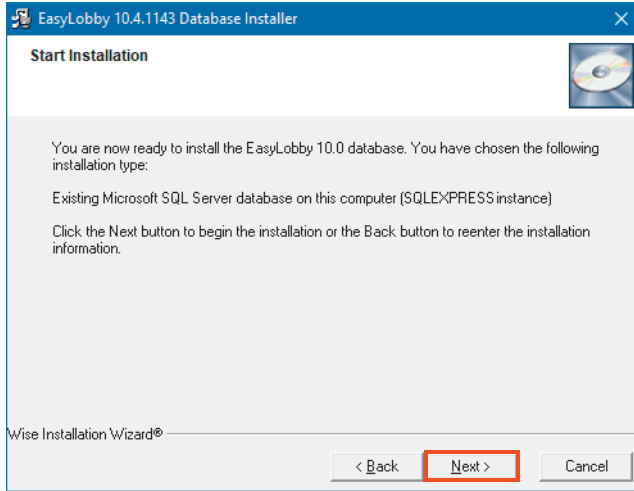
9. Allow up to a minute for the schema installation to complete. When the installation of the database has finished, click **View Log** to review the results of the database installation script.
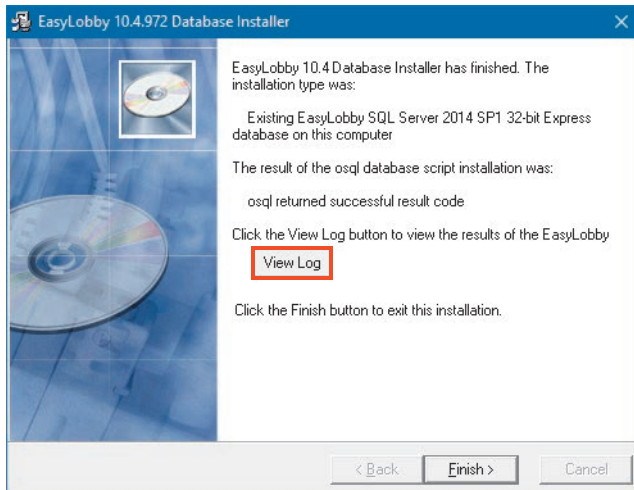
10. Verify that error messages are not displayed in the log. If the log is displayed as shown here, your database should be successfully installed. The installation creates a new SQL Authentication account named easyuser10 and a new database catalog named EasyLobby10. The easyuser10 account has database owner (dbo) rights on the EasyLobby10 database.

11. Go to *Section 2.9: Set up a SQL Server ODBC data source on each client computer*.

2.8.2 Use an existing 64-bit Microsoft SQL Server

Note: You do not need to complete this section if you have installed the database using the method described in *Section 2.8.1: Use an existing 32-bit Microsoft SQL Server*.

You can use the Microsoft SQL Server 2014 Management Studio program (a free download) to manually load the EasyLobby database schema into your 64-bit SQL Server. SQL Server Management Studio can be run from the database server itself or from any client system where it is installed.

1. Open Microsoft SQL Server 2014 Management Studio (supplied) or a more recent version.
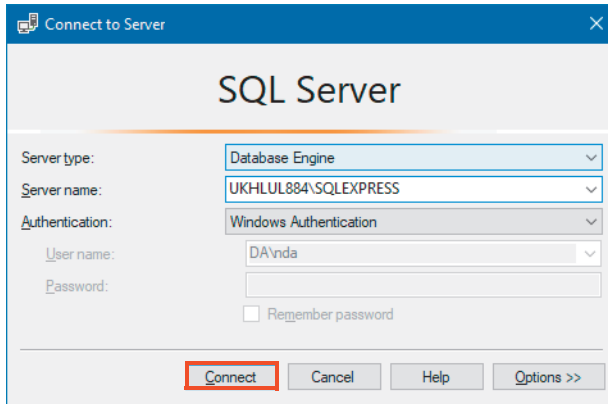
2. If required, enter the account details of your 'sa' system administrator account or another account that has administrator privileges on the SQL Server. Click **Connect**.

3. Click **File** > **Open** > **File** and open the file **dbCreateSQLServer.sql** from the SQL folder of either your product DVD or the EasyLobby installation folder (typically C:\Program Files (x86)\EasyLobby\EasyLobby SVM 10.0\SQL). The interface should resemble the image below.
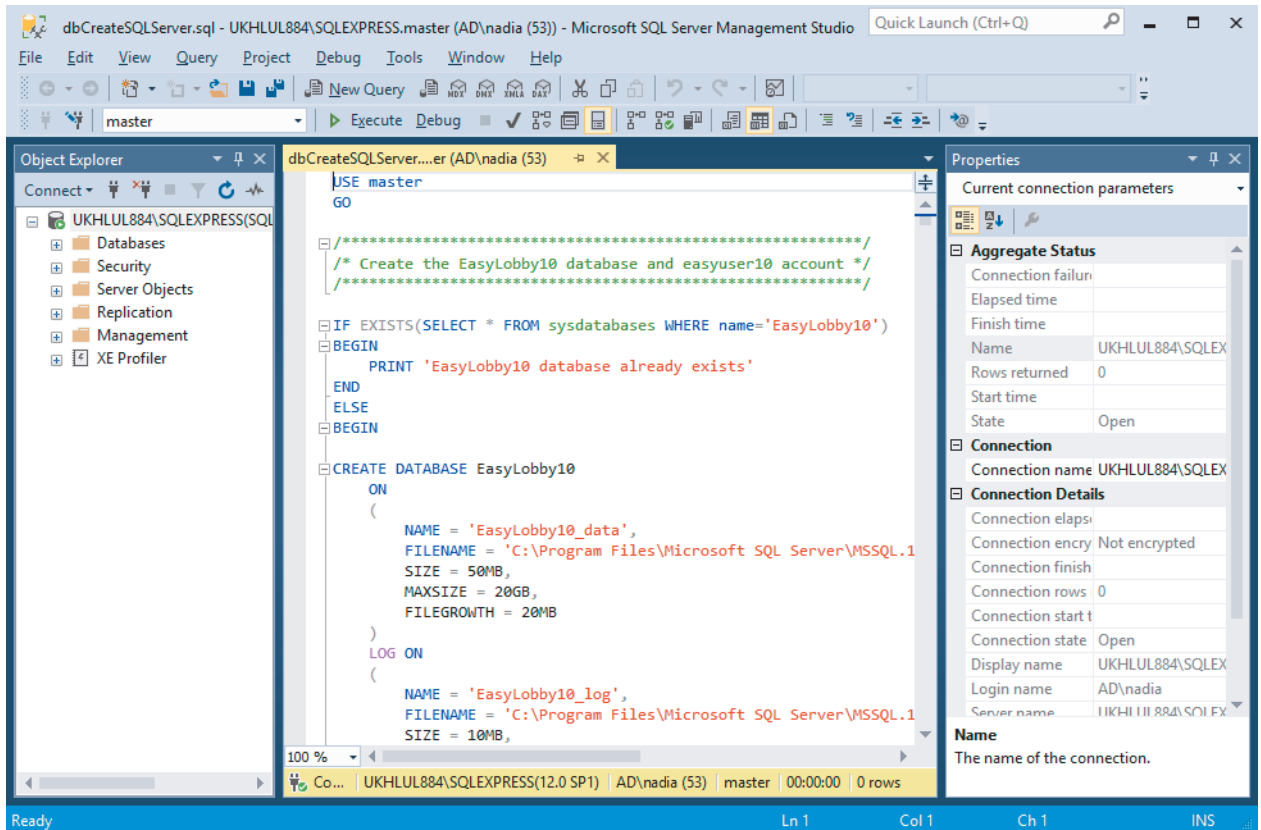
4. In the script, carefully edit the two instances of the FILENAME value to reflect the actual installation folder of SQL Server on your database server computer, for example:

```
FILENAME = 'C:\Program Files\Microsoft SQL Server\MSSQL12.SQLEXPRESS\MSSQL\DATA\EasyLobby10_data.mdf',
FILENAME = 'C:\Program Files\Microsoft SQL Server\MSSQL12.SQLEXPRESS\MSSQL\DATA\EasyLobby10_log.ldf',
```

These variables specify the folder locations where the data and log files for the database are created. The database files must reside somewhere on the database server. The files do not have to reside in the SQL Server installation folder. They may reside anywhere you choose, although for performance reasons it is recommended that they reside on a local hard drive.

5. Click **Execute** on the toolbar to execute the SQL script (or click **Query** > **Execute**, or press F5). The **Messages** area at the lower right should show the results; ensure that there are no errors.
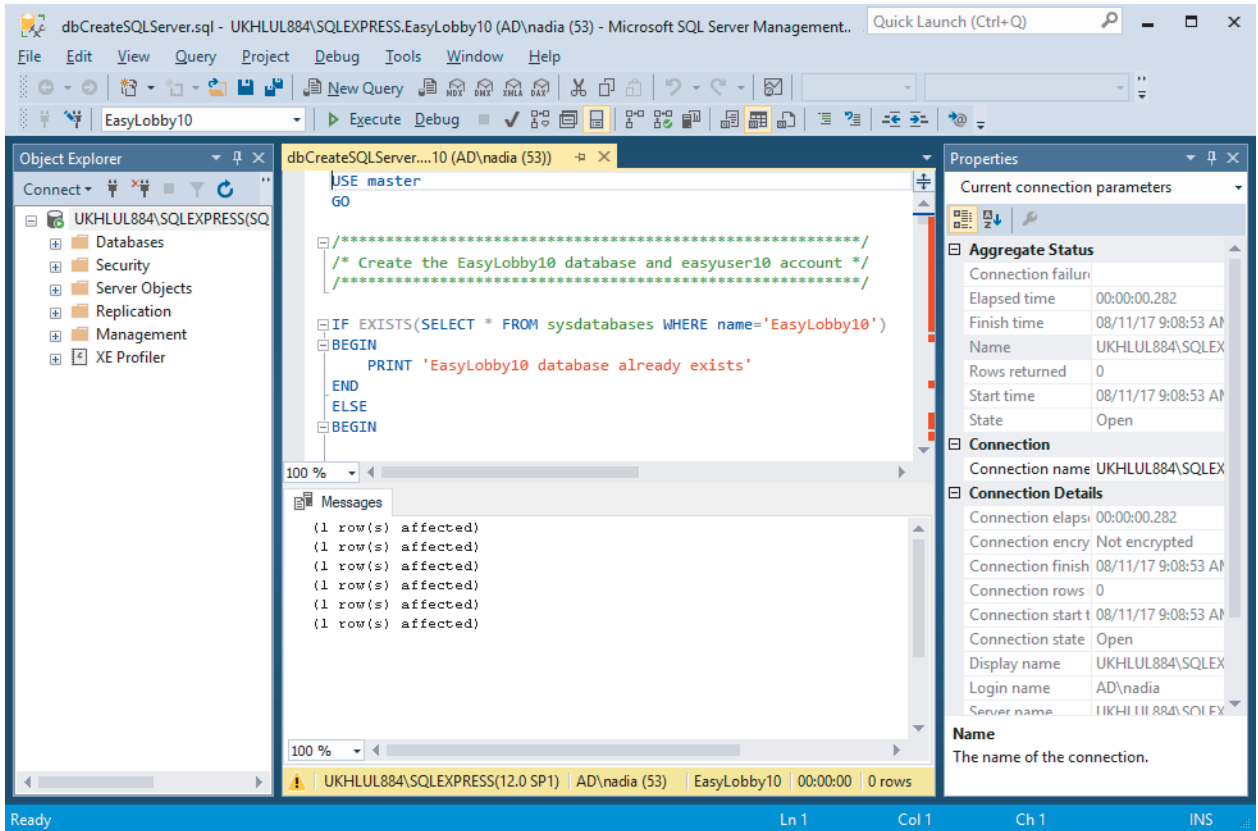
If this script executes with no errors, a new EasyLobby10 database is created on your database server, along with the default account called easyuser10, with a password of door10maN+, which is the dbo (database owner) for that database.

6. Right-click the top-level server icon and click **Refresh**. You should see the new EasyLobby10 database listed under your database server in the Databases folder:
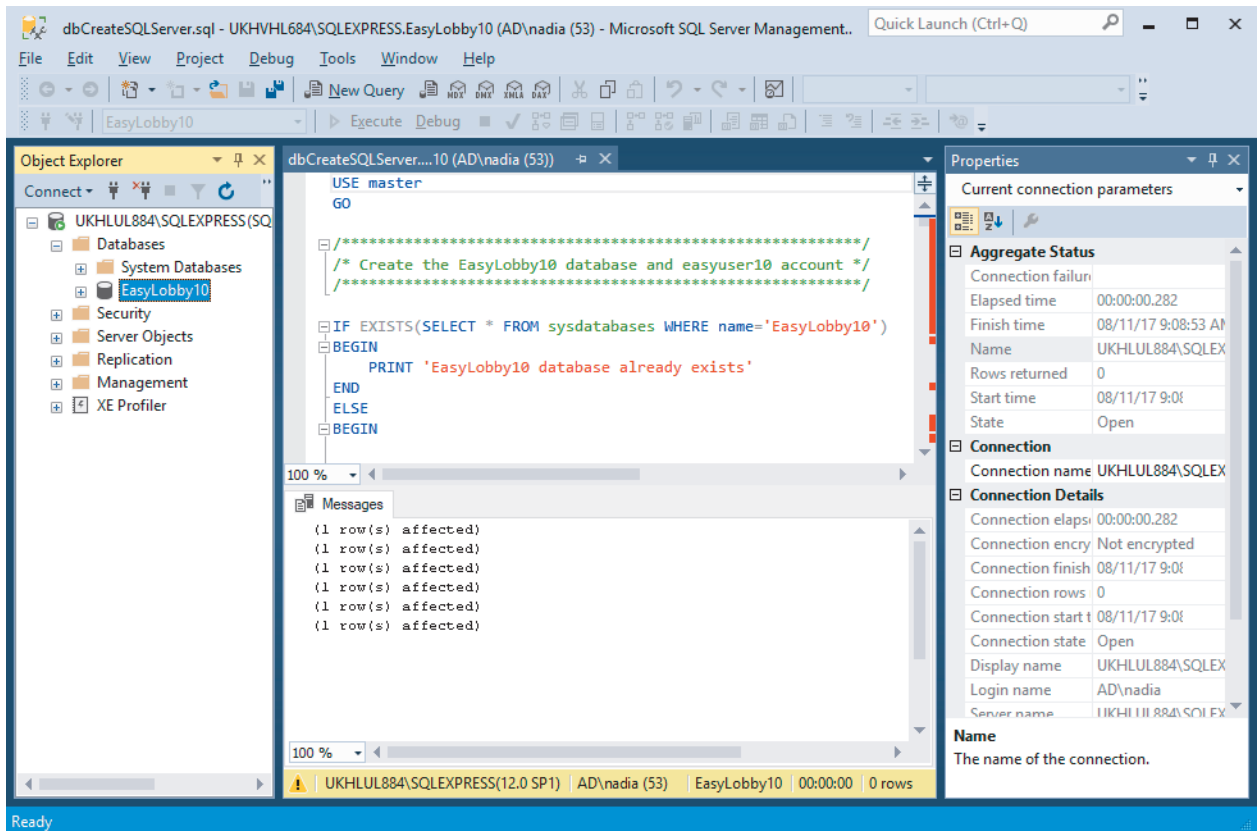
7. Go to *Section 2.9: Set up a SQL Server ODBC data source on each client computer*.

2.9 Set up a SQL Server ODBC data source on each client computer

A SQL Server ODBC data source (DSN) must be created on each EasyLobby client computer that will run EasyLobby SVM, Administrator or eAdvance.

1. On the client PC, open Control Panel and click **Administrative Tools** > **ODBC Data Sources (32-bit)**.

2. Click the **Drivers** tab and check that you have the 'SQL Server' ODBC driver. Windows typically has these drivers already installed. If you do not have the SQL Server driver, download and install the MDAC 2.8 SP1 update from the Microsoft web site, or contact your system administrator.
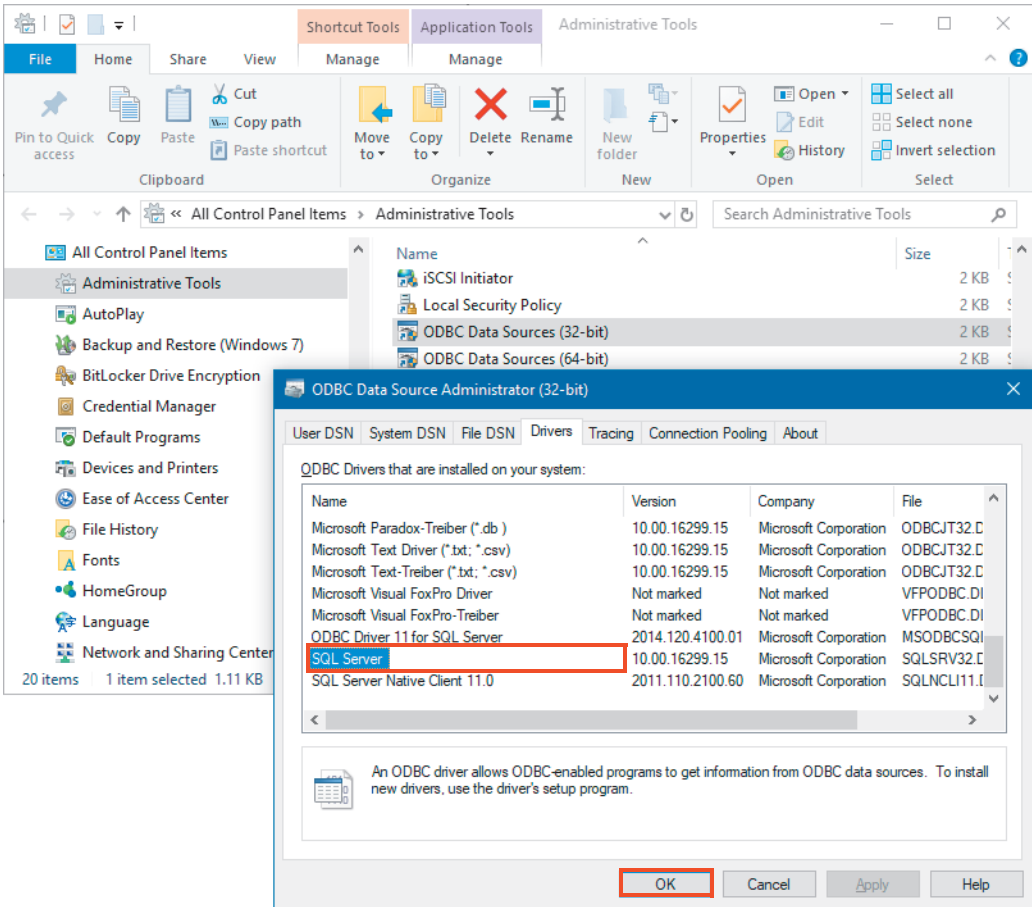
3. Click the **System DSN** tab and click **Add**.
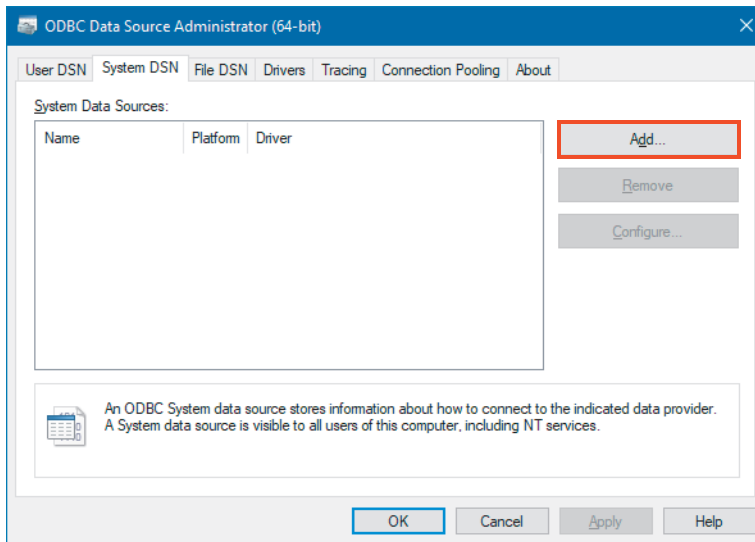
4. Select **SQL Server** and click **Finish**.
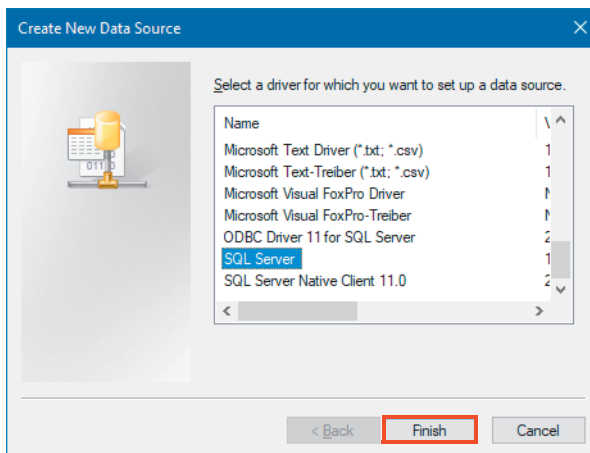
5. In the **Create a New Data Source**... window, type a name such as EasyLobby10 and an optional description for your new data source.
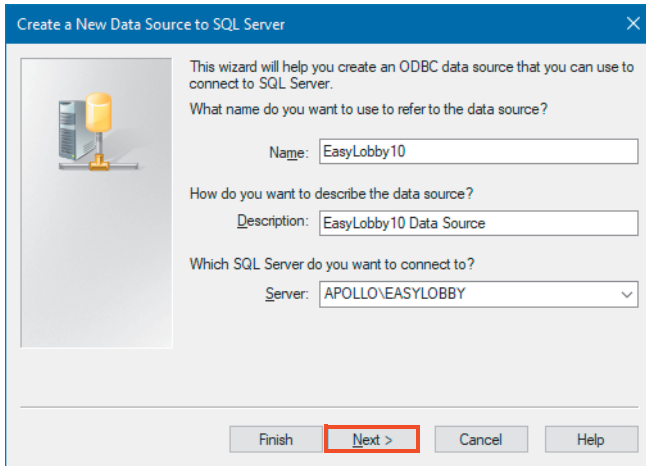
Type or select the name (or IP address) of your database server in the **Server** field.

- If you previously used *Section 2.8.1: Use an existing 32-bit Microsoft SQL Server*, you might need to manually type the name of the server, for example MACHINE\SQLEXPRESS, as the server.
- If you previously used *Section 2.8.2: Use an existing 64-bit Microsoft SQL Server*, you might need to manually type the name of the server, for example MACHINE\SQLEXPRESS, as the server. You can use SQL Server Configuration Manager to see what instances are installed (e.g. SQLEXPRESS).

6. Click **Next >**.

7. In the following window, select **With SQL Server authentication**. Type the login ID **easyuser10** and password **door10maN+**, then click **Next >**. If you are using Windows NT Authentication or alternative credentials for SQL Authentication, make the appropriate modifications and remember to run the EasyLobby Authenticate utility to specify the alternative connection type.
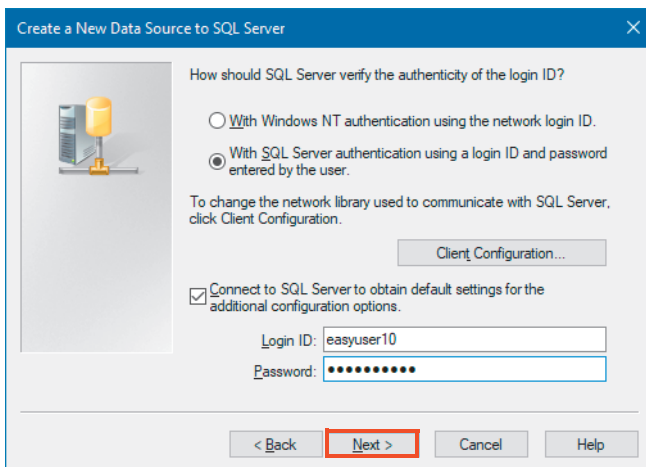
8. If the following window is displayed, then you have connected to your database server. If you get an error message, then either the server can't be found or the credentials were entered incorrectly.

Verify that **Change the default database to:** is selected and select **EasyLobby10** on the drop-down. Click **Next >**.
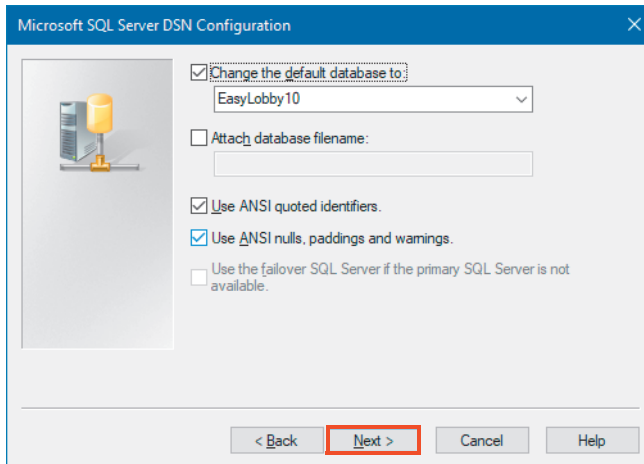
9. Click **Finish**.
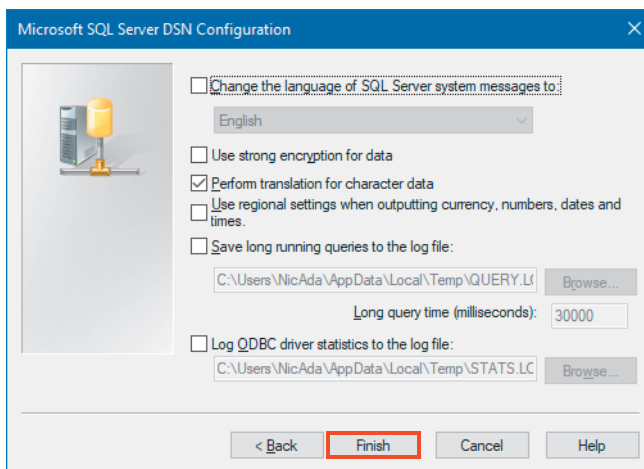
10. Click **Test Data Source** to make sure the connection to the database is working.
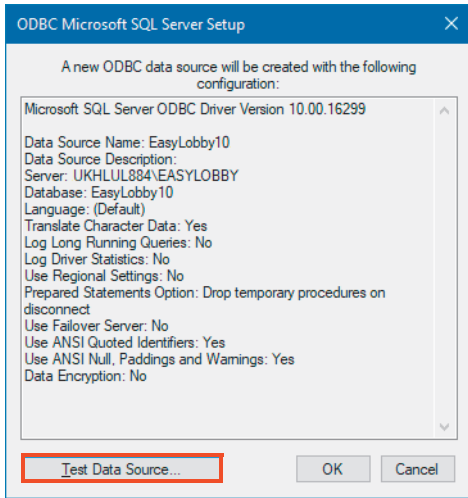
11. Click **OK**. You have now created a data source called EasyLobby10 (or the name you entered in the name field earlier).
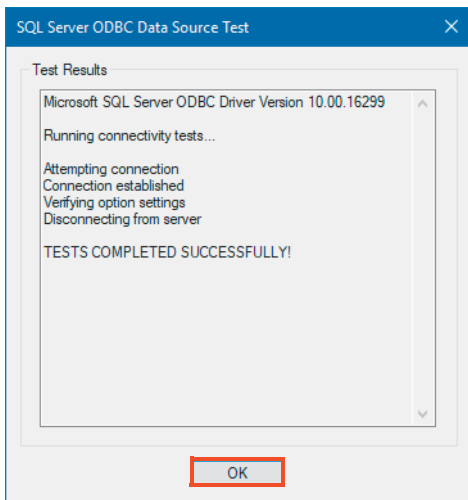
12. Go to *Section 2.12: Connect EasyLobby to the SQL Server or Oracle database*.

2.10 Install an Oracle database

1. Open a web browser of your choice and go to:
   http://www.oracle.com/technetwork/database/enterprise-edition/downloads/.

2. Select **Accept License Agreement** and click the desired Windows download file, for example Oracle Database 12c Release 1. If there is more than one zip file (e.g. File1, File 2) make sure to download all files.
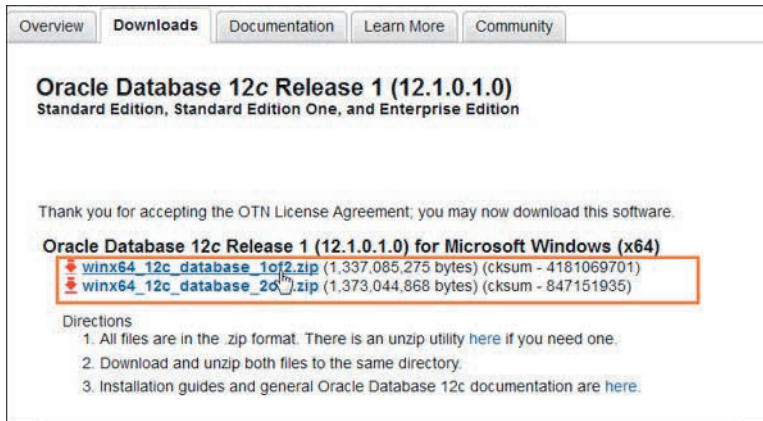
3. Log into your Oracle web account, then choose a location to save the zip files.

4. Extract the zip file(s) to a folder of your choice. If there is more than one zip file, extract them to the same folder.

5. Expand the database folder that you extracted in the previous section, and double-click **setup**.

6. Follow the instructions to install Oracle Database 12c.

   Note: During installation, be sure to clear the **Create as container database** option. If this option is checked, you cannot create a local user in the root container. The EasyLobby database installer will not work unless you have proper roles assigned to a specific database. Keep a note of the install location, global database name, and administrative password.
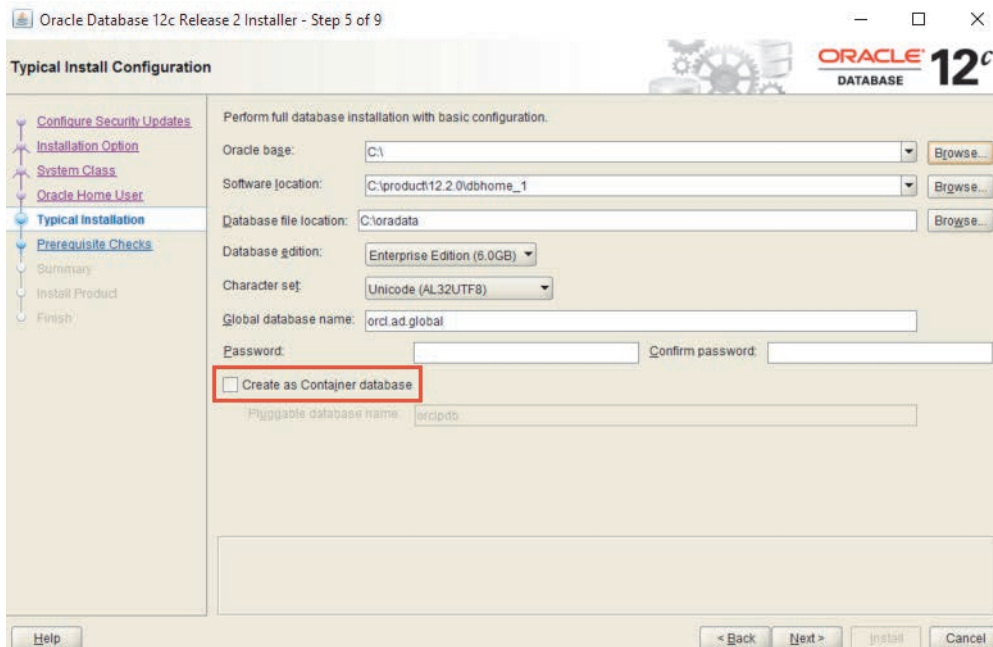
2.10.1 Use an existing Oracle database

It is necessary to create a Windows environment variable.

1. Open Control Panel and click **System** > **Advanced system settings** > **Environment Variables**.

2. In the **User variables** section, click **New**.

3. Set the variable name to **EASYLOBBY_ORACLE_HOME**.
    Set the variable value to the Oracle install location, for example: **C:\product\12.2.0\dbhome_1** or **C:\app\Tester\product\11.2.0\dbhome_1**.
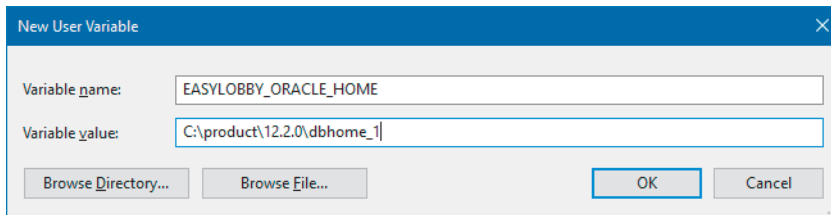
4. Check if you have a system environment variable named **ORACLE_SID** set to your Oracle database instance. If it is not present, create a new system variable with the name **ORACLE_SID**, and set the value to your Oracle database instance (XE, orcl etc.):
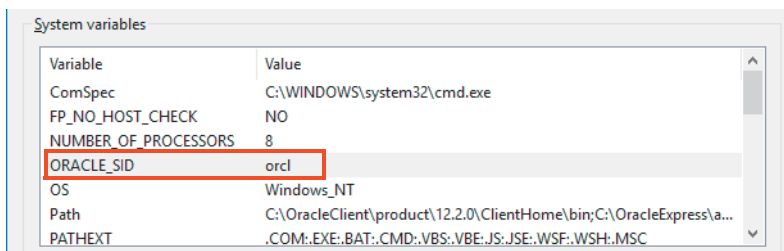
5. Open Control Panel, click **Administrative Tools**, then double-click **Services**. Restart any Oracle services.

6. Insert the EasyLobby DVD into the computer that will be your database server.
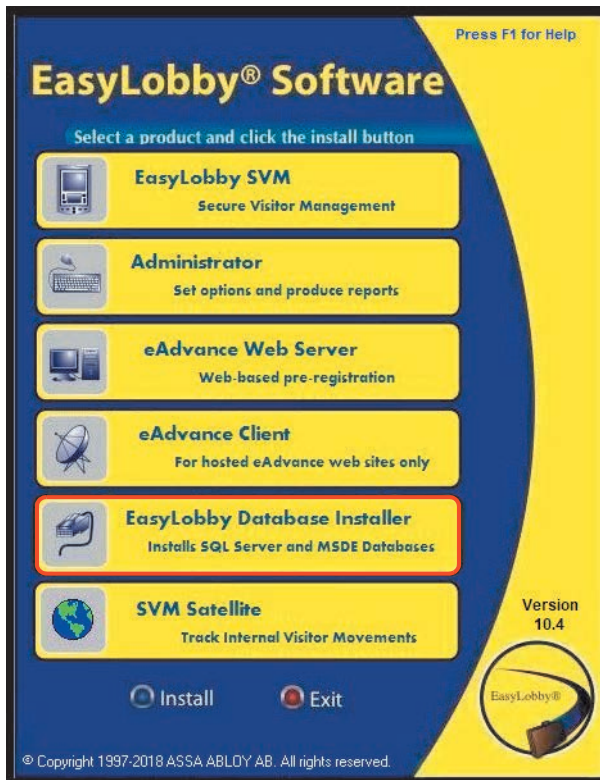
7. Select EasyLobby Database Installer and click **Run**. If the EasyLobby product installation window (shown below) does not appear automatically, run **Setup.exe** from the root of the DVD.

8. The initial splash screen is displayed. Click **Next >**.
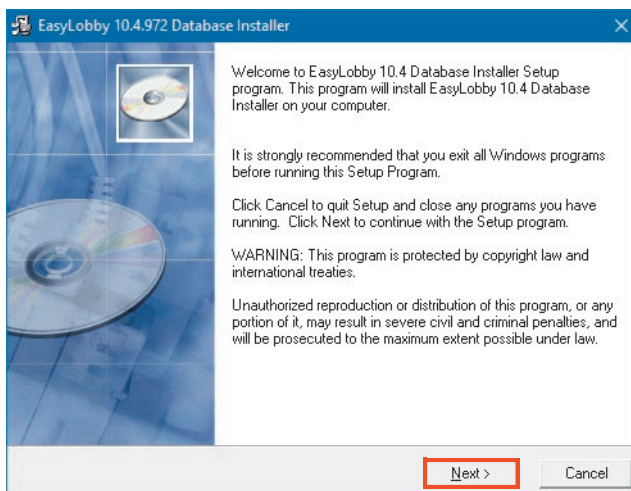
9. On the **Select Target Database** window, select **Existing Oracle database...** and click **Next >**.
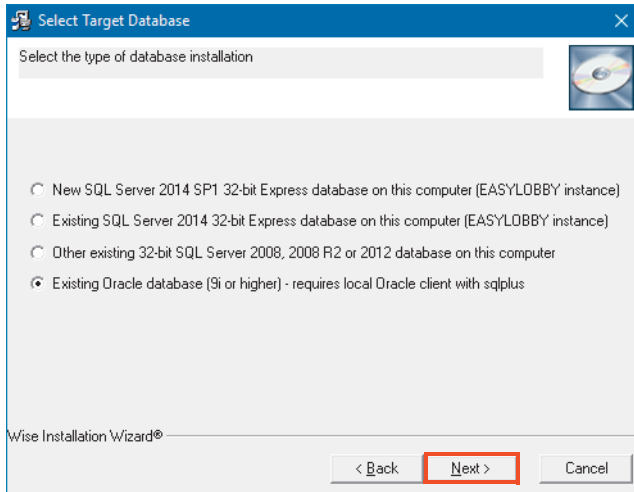
10. In the **Oracle Credentials** windows, enter the Oracle Net Service Name (e.g. xe, orcl), Oracle user ID and administrative password.
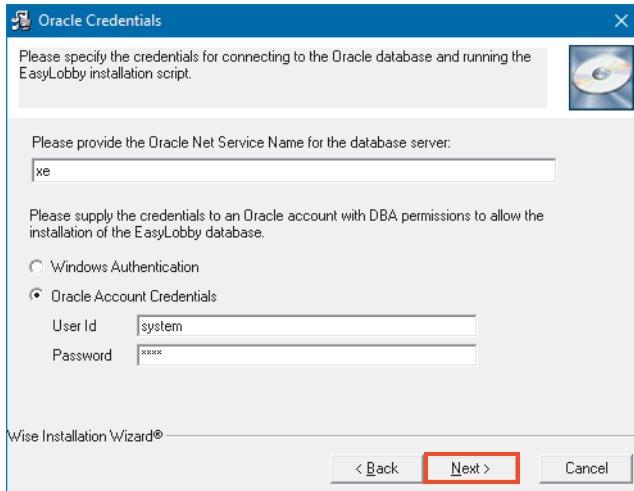
11. The **Start Installation** window is displayed immediately before the actual installation is ready to start. Review the installation information and click **Next >** to start the installation.
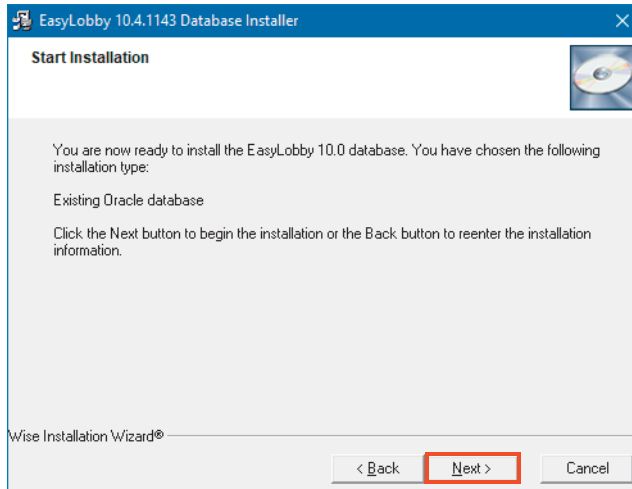
12. Allow up to a minute for the schema installation to complete. When the installation of the database has finished, click **View Log** to review the results of the database installation script.
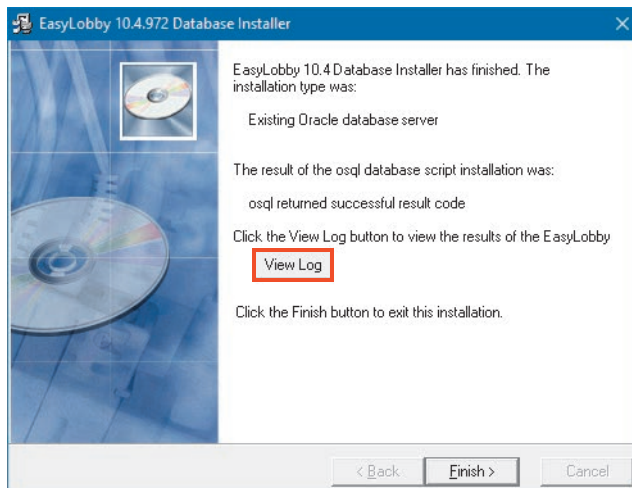
13. Verify that error messages are not displayed in the log.

2.11 Set up an Oracle Net Service Name

Note: You do not need to complete this section if you are using a Microsoft SQL Server.

Before you can set up an ODBC data source, you must first set up an Oracle Net Service Name for the EasyLobby database. All Oracle database access occurs through the Net Service Name. The ODBC driver is layered on top of the Oracle Net Service. The Net Configuration Assistant software is installed by default when the Oracle client software is installed.

Note: If you wish to perform a manual installation of the EasyLobby schema, see *Section 2.11.2: Manual installation of the EasyLobby schema on an Oracle database server*.

1. To set up a Net Service Name, open Oracle Net Configuration Assistant.

2. Select **Local Net Service Name configuration**. Click **Next**.
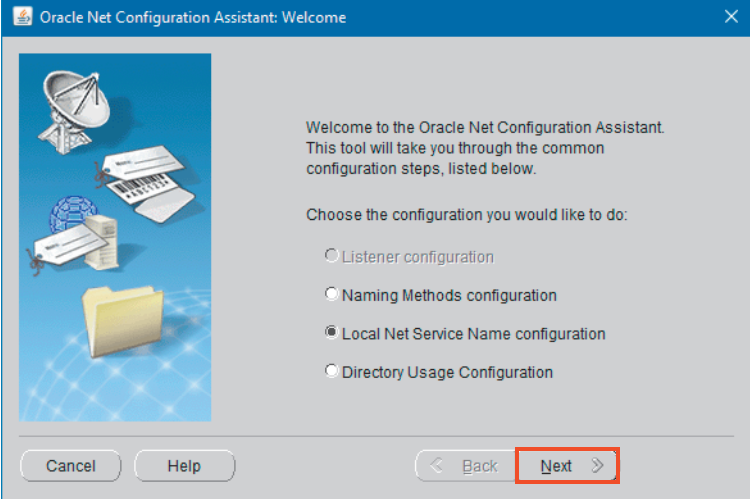
3. Select **Add** and click **Next**.
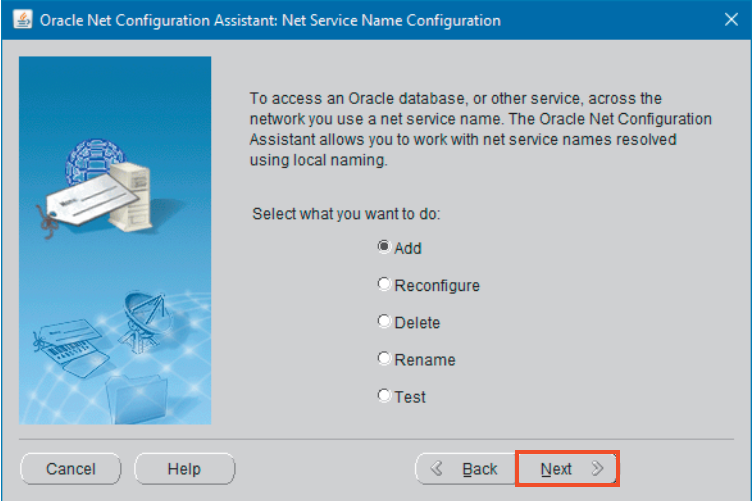
4. Type the **Service Name** for your database server. If you are not sure of the service name, use the Oracle Enterprise Manager / Net Manager to add your database server to the tree. Click the icon for the database. The service name is listed in the TNS descriptor / Service Identification.
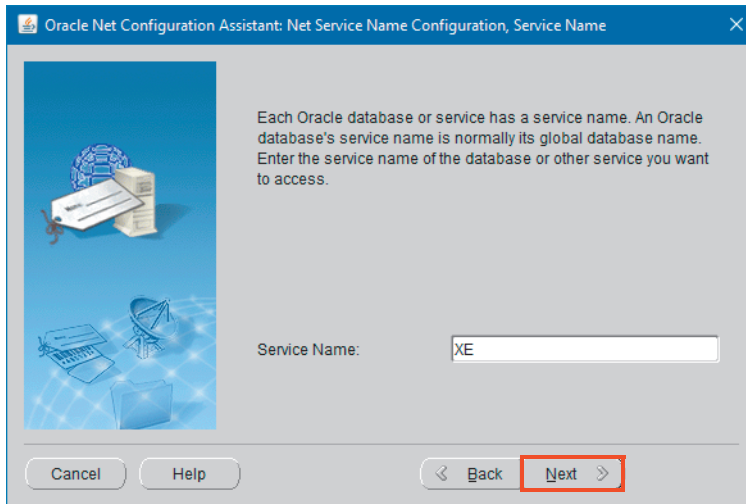
5. Select **TCP** and click **Next**.
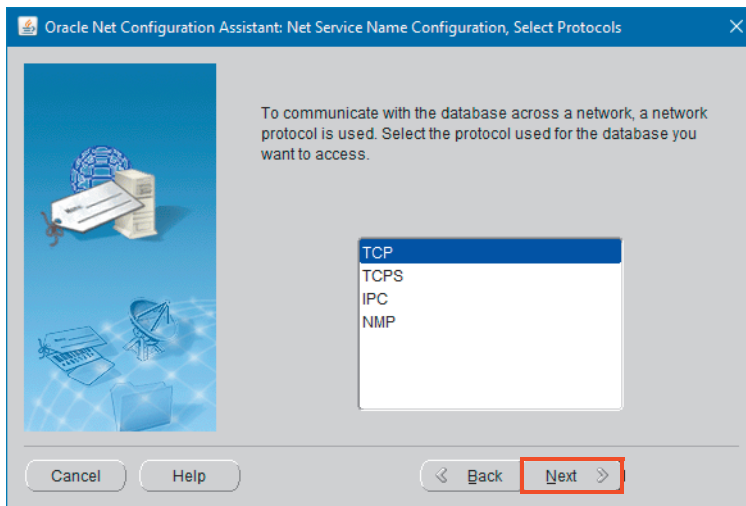
6. Type the name or the IP Address for your Oracle database server and click **Next**.
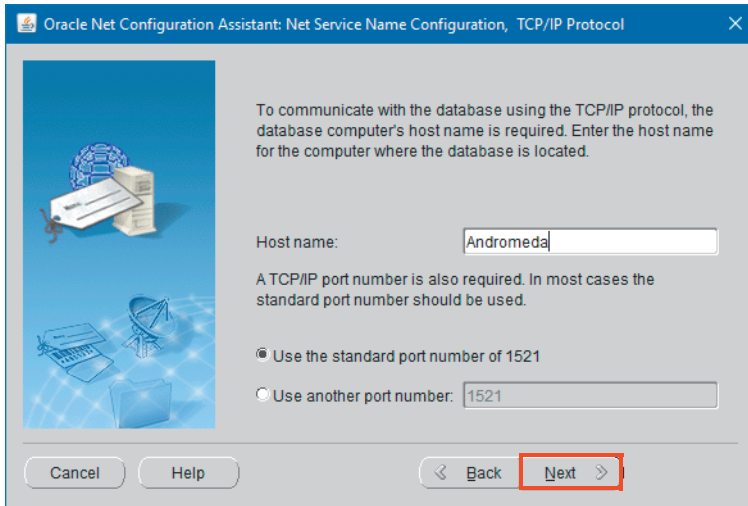
7. Select **Yes, perform a test** and click **Next**.
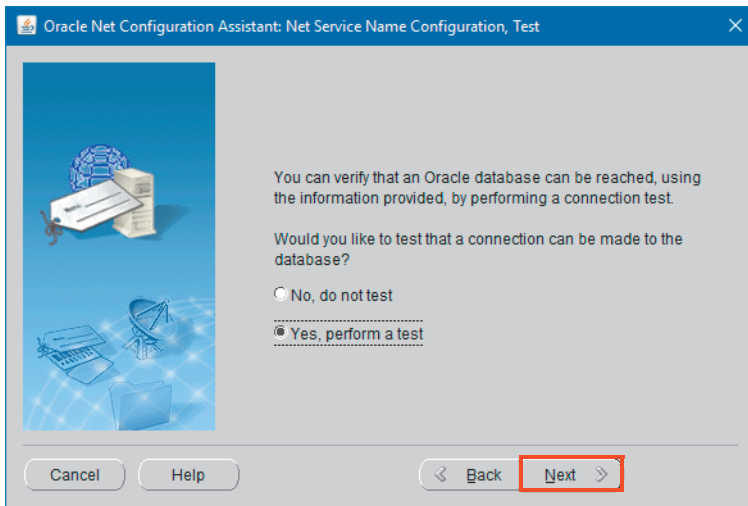
8. Click **Change Login** and type your username and password. When the test is successful, the following window is displayed. Click **Next**.
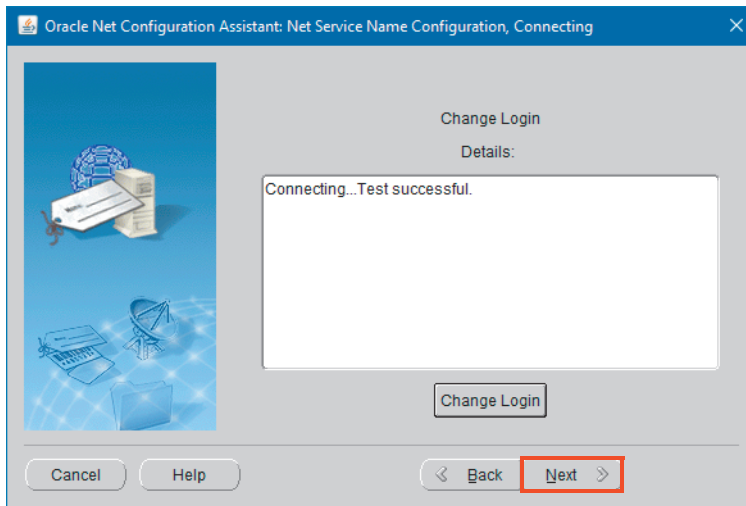
9. Type the **Net Service Name** as shown here. You may type any name you wish in this field, for example, EasyLobby. Click **Next**.
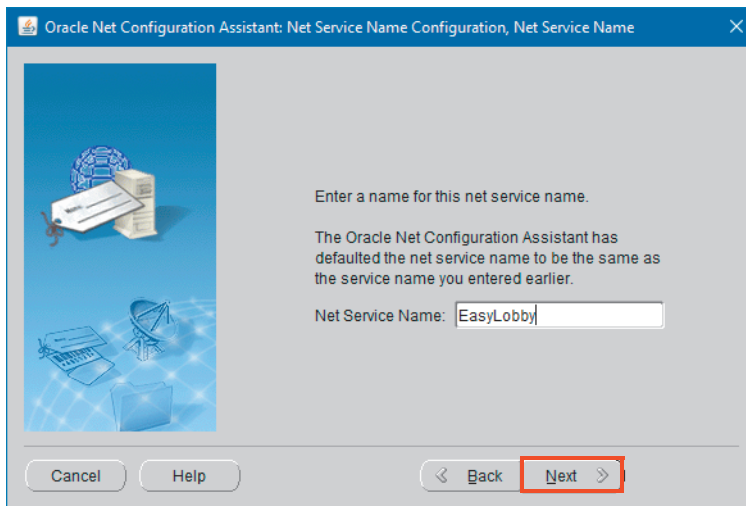
You now have created an Oracle Net Service name. You need this name when creating an ODBC data source for this Oracle database. Use this name whenever you are prompted for a "service", "service name", or "server".

2.11.1 Set up an Oracle ODBC data source on each client computer

1. Open Control Panel and click **Administrative Tools** > **ODBC Data Sources (32-bit)**. Click the **Drivers** tab and check to ensure that you have an Oracle ODBC driver with a name beginning with **Oracle in...** (or similar), version 9.0.2 or higher.
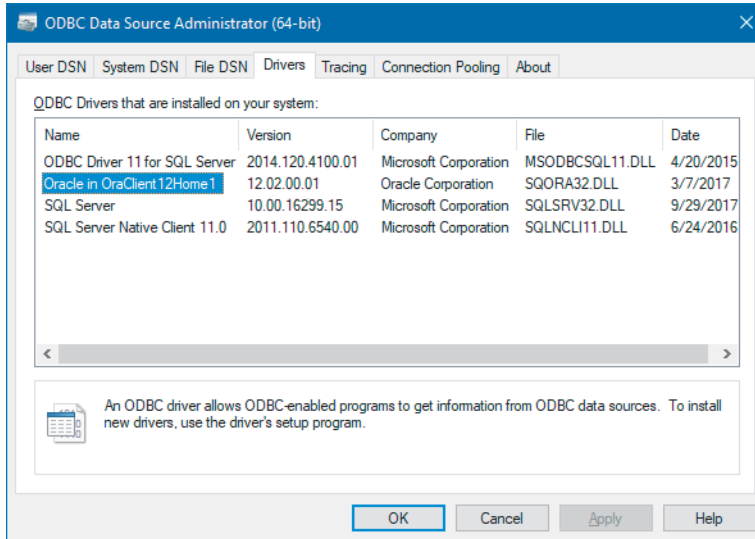
2. Click the **System DSN** tab. Note that to create a System Data Source may require local administrator privileges. Click **Add**.
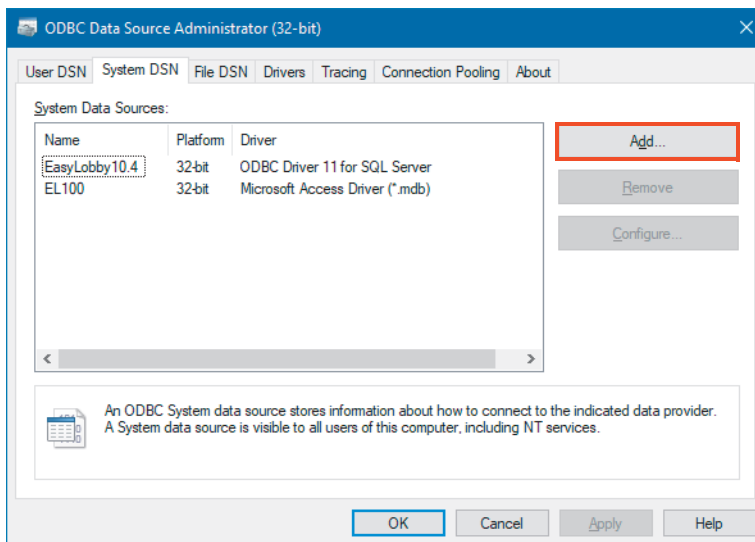
3. Select the **Oracle in...** driver and click **Finish**.
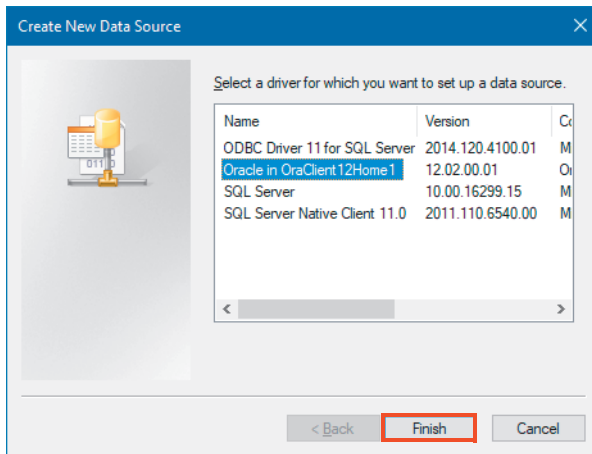
4. Type the information as shown. You may call the **Data Source Name** field anything you like, for example, EasyLobby10 as shown. Description is optional. The **TNS Service Name** is the Net Service Name that was entered when the Net configuration was created. The **User ID** field should be set to easyuser10. Click **Test Connection** to test the connection.
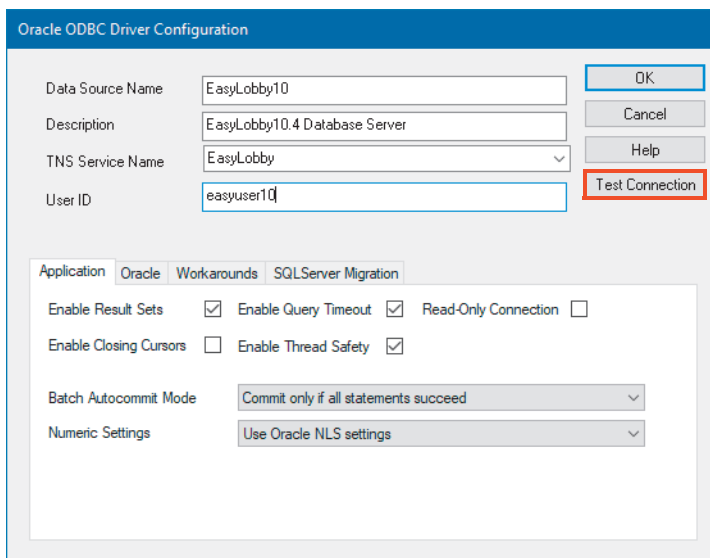
5. Type the password (the default is door10maN+), and click **OK**.
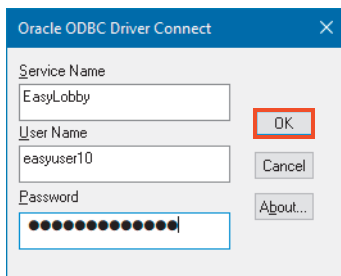
6. Click **OK** to confirm, then click **OK** once more in the **Oracle ODBC Driver Configuration** window; your new data source is listed in the data sources list.
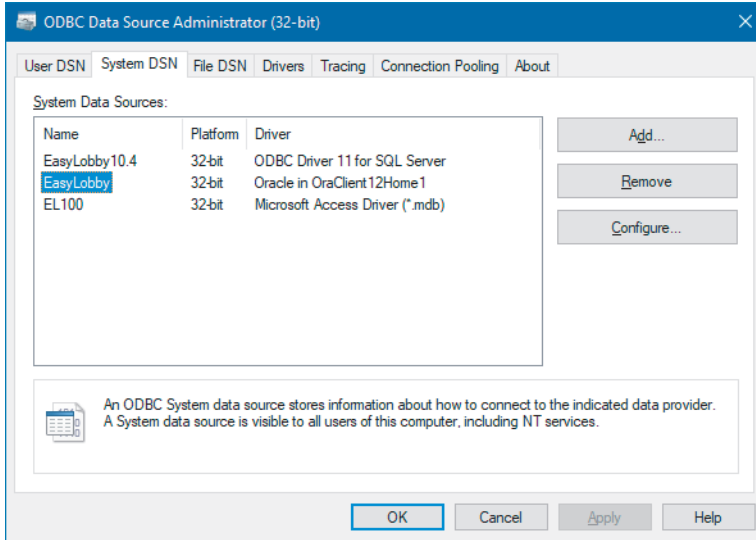
2.11.2 Manual installation of the EasyLobby schema on an Oracle database server

Note: You do not need to complete this section if you have installed the database using the database installer documented in *Section 2.11: Set up an Oracle Net Service Name*.

You can use the Oracle SQL Developer program (formerly SQLPlus Worksheet) to manually create the EasyLobby database schema into your Oracle database server. Oracle SQL Developer can be run from the database server itself or from any client system where it is installed.

1. Open Oracle SQL Developer (or equivalent, depending on the version you have installed).
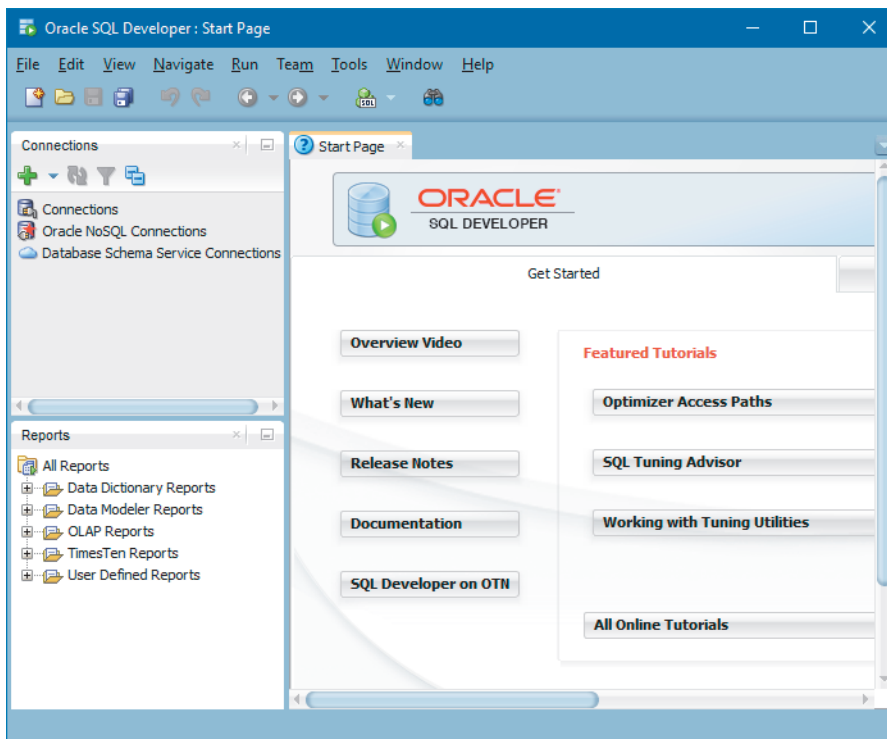
2. In the Connections pane, click the ✚ New Connection icon. Type the details for your Oracle server and click **Test** to check the connection. Click **Connect**.
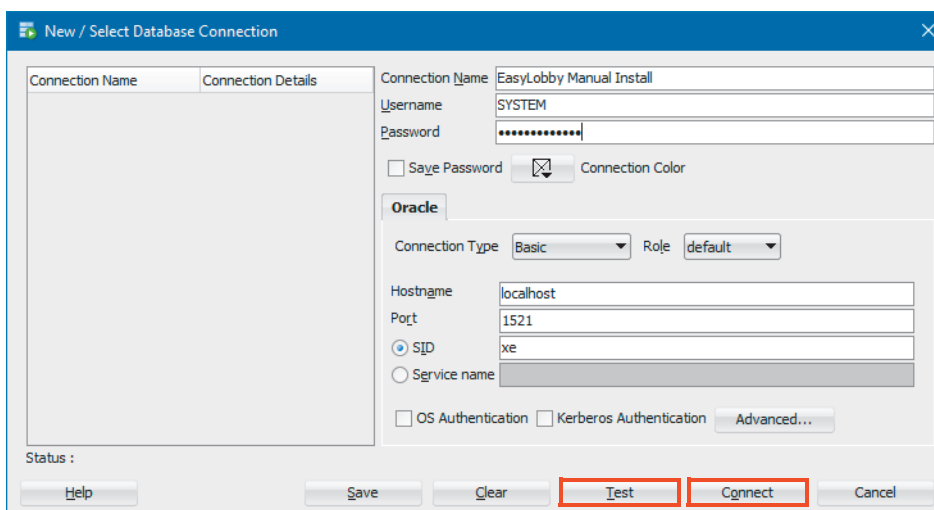
3. Click **File** > **Open** and select the file called dbCreateOracle.sql from the SQL folder of either your product DVD or the EasyLobby installation folder (typically C:\Program Files (x86)\EasyLobby\EasyLobby SVM 10.0\SQL).
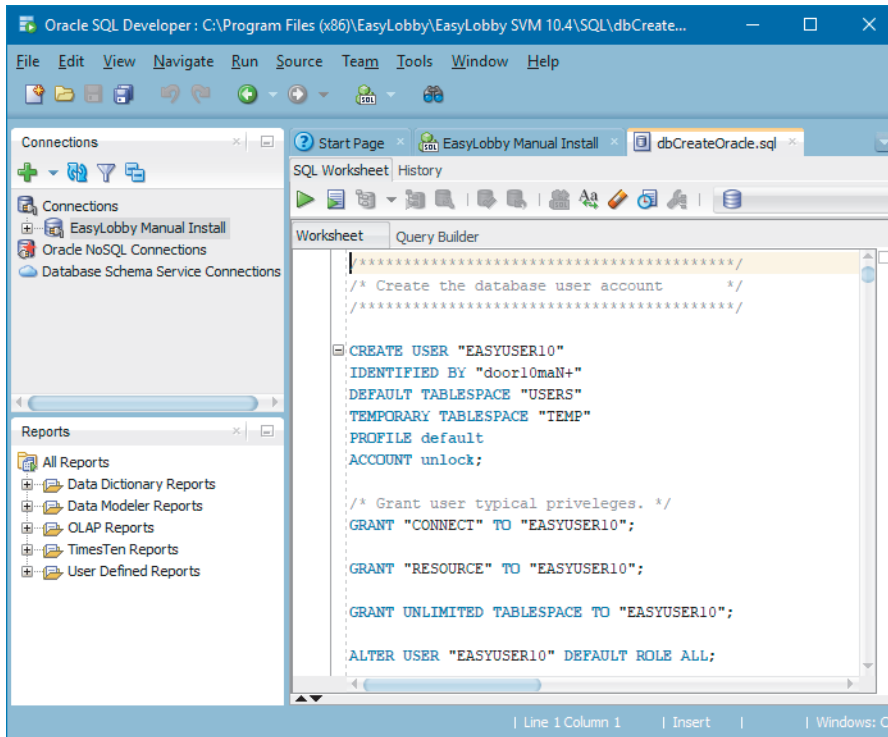
4. Click ▤ **Run Script** or press **F5**. Ensure that there are no errors after the script executes.

2.12 Connect EasyLobby to the SQL Server or Oracle database

Start EasyLobby. Click **File** > **Open Visitor Log** > **Data Source** and select the SQL Server or Oracle DSN that you created, as shown in the window below. EasyLobby remembers this connection each time you restart the program.
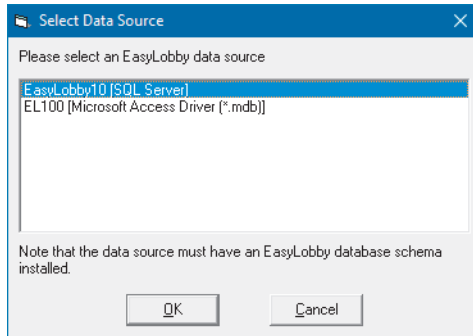
If you connect successfully to the database, you are presented with a login dialog.
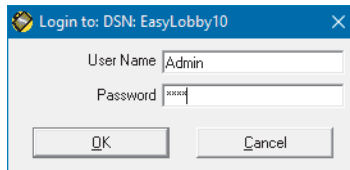
If this is your first time connecting, and you have not changed the user accounts for EasyLobby, then you can log in with any of the following accounts:

Login Name	Password	Permission Level
Admin	pass	Administrator
Administrator	pass	Administrator
Manager	pass	Manager
Operator	pass	Operator
Novice	pass	Novice

Note: For all of these accounts, the password is case-sensitive, though the login name is not. For security purposes, it is recommended that all logins are issued new and unique passwords after the initial setup of the EasyLobby application.

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Configuration

3.1 Start Administrator

To start Administrator, either double-click the Administrator icon on your desktop or click **Start** > **EasyLobby 10.0** > **EasyLobby Administrator 10.0**.

You are prompted to login with your user name and password. Only users with the administrator authorization level can log into Administrator.

When you start Administrator you begin on the visitor log tab, and the visitor log used in the previous session is automatically opened.
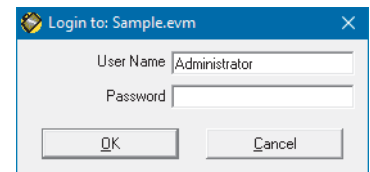
3.1.1 Administrator menus

- **File**: Create a new database, open an existing database, run reports, and to backup, restore, and exit the system.
- **Edit**: Cut, copy, and paste, and to create and edit users, reasons, categories, sites, stations, station enrollment, signature types, and visitor alerts. In addition, the administrator can view Active Logins, and the Event Log.
- **Visitor**: Look up and sort visitor records on the grid view and check out visitors.
- **Employee**: Look up and sort employee records, add new employees, print employee badges, add employees to the watch list, and create and edit employee companies, categories, and departments.
- **Package**: Look up and sort package records.
- **Asset**: Look up, sort, create, and edit asset records.
- **Lost & Found**: Look up, sort, create, and edit lost and found records.

3.2   Set up company information, sites, and stations

There are three levels to set up in EasyLobby: Enterprise, Sites, and Stations.

- **Enterprise** is the top level comprising all workstations within your EasyLobby system.

- **Site** is the second level of location, such as a building.

- **Station** is the third level, where the EasyLobby program is installed on the computer. This might be the main lobby, loading dock, or guard gate.

3.2.1   Sites

To set up sites for your company (in Administrator or SVM):

1. Click **Edit** > **Sites**.
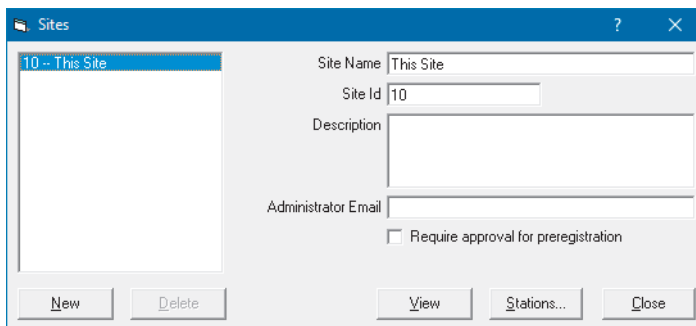
2. To add a new site, click **New**. A new site is added to the list on the left. You can specify the Site Name, Site Id, Description, and Administrator Email address (see note) in the fields on the right. Site Id is a positive number that is set to any value. The Site Id is used as the first digit(s) in the Custom Id, which is automatically assigned to all visitors and packages.

3. To edit a site, select the site to edit from the list on the left and change the information for the site on the right.

4. To delete a site, select the site from the list on the left and click **Delete**.

5. Click **Close**.

Note: The administrator email address is important. It is used to send many types of notification including the panic message.

3.2.2   Stations

To set up stations for your company:

1. Click **Edit** > **Stations**.
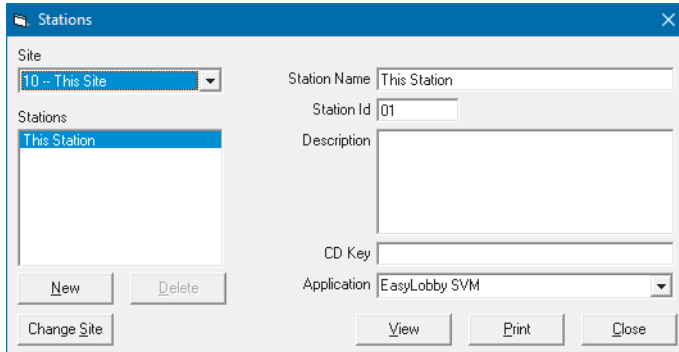
2. On the **Site** drop-down, select the site to which you wish to add/specify stations.

3. Click **New** to add a new station. A new station is added to the list on the left and you can specify the station name, description, and license key in the fields on the right.

   Note: You can set up all the stations and their license keys from one system. When you install the particular stations and start EasyLobby, they self-enroll based on the license key and connect to the database.

4. To edit a station, select the station to edit from the list on the left and change the information for the station on the right.

5. To delete a station, select the station from the list on the left and click **Delete**.

6. Click **Close**.

3.2.3   Station enrollment

To select the site and station for the computer:

1. Click **Edit** > **Station Enrollment**.
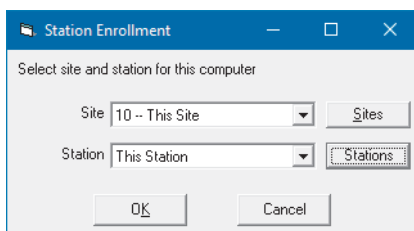
2. On the **Site** drop-down, select the site for the stations you will add/specify.

3. You can set up all the stations and their license keys from one workstation. When you install the particular stations and start EasyLobby, they self-enroll based on the license key and connect to the database.

3.3 Set up users

EasyLobby enterprise administrators can create users in EasyLobby SVM and Administrator. You can have more than one EasyLobby system enterprise administrator (users with enterprise administrator rights).

There are five security levels of users: Enterprise Administrator, Site Administrator, Manager, Operator and Novice. When users log in and add visitor records, their user name is indicated on the record in the "Operator" field. You may have as many users as you need, since EasyLobby licensing is per computer, not user. For further details of the permissions available to each user level, see *Section A.1: User level access to commands*.
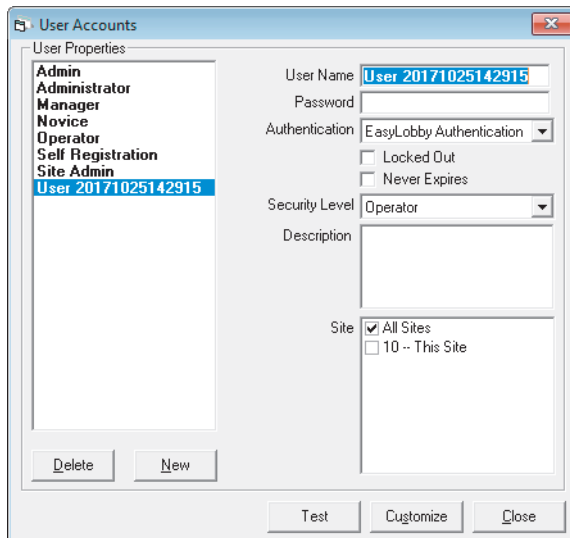
3.3.1 Create user names and passwords

To create a user in EasyLobby SVM or Administrator:

1. Click **Edit** > **Users**. If you have created a new log based on the sample, the users for the sample log display. If you created a new empty log, only the site administrator user displays.
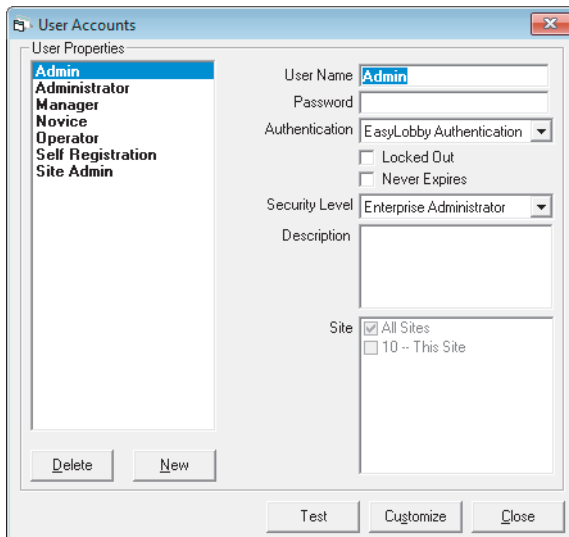
2. Click **New** to add a user. The new user information is displayed.

3. Enter the following information:

Field	Description
User Name	3 to 30 alphanumeric characters. The user name is not case-sensitive.
Password	A password is not required, but is recommended. The password is case-sensitive and encrypted. To set password specifics, such as minimum length and complexity rules, click **Edit** > **Program Options** > **Security** > **Password** tab. After initial setup, users at all security levels can change their own password using **File** > **Change Password**.
Authentication	**EasyLobby Authentication**: The user logs in with the provided user name and password. **Single sign-on**: The user's Windows account name is provided as the user name. No password is necessary. When launching EasyLobby the software checks that the logged in Windows account matches a user name in the EasyLobby system. If a match is found, the user is automatically logged in without a login prompt. **Active Directory**: The active directory account name is provided as the user name. When launching EasyLobby the user is prompted with a login window to type the Active Directory user name and password. The software checks the Active Directory for the credentials and if a match is found, the user is logged in.
Locked Out	The user has been locked out of the database due to the number of failed attempts to log in. Clear this option to unlock the user.
Never Expires	The password will never expire.

Field	Description
Security Level[1]	Choose one of the following levels or customize the security level:
	Enterprise Administrator: Used by those who install and set up EasyLobby at the enterprise level. In addition to manager tasks, administrators can create and manage visitor logs and users, and can import and export log information. You may have more than one administrator and it is recommended to have a second administrator account as a backup for the primary administrator.
	Site Administrator: Used by those who install and set up EasyLobby at the site level. In addition to manager tasks, administrators can create and manage visitor logs using Administrator, and can import and export log information. You may have more than one administrator and it is recommended to have a second administrator account as a backup for the primary administrator.
	Manager: Used by those who will create visitor reports. In addition to operator tasks, managers can open logs, add and modify employee information, backup and restore logs, set preferences, and create reports.
	Operator: Used by most reception desk staff. In addition to novice tasks, operators can add events and view log properties.
	Novice: For new EasyLobby users and temporary reception desk staff. Novices can enter new visitors, check visitors in and out, print badges, and do visitor log lookups.
	inAdvance User: (No longer functional; do not use).
	Self Registration: A user name with this security level starts EasyLobby in self-registration mode for self-registration stations. See *Section 4.2.1: Start and login to self-registration mode*.
Description	Type an optional description.
Site	Specify the site or all sites for the user.

1. For additional detail, see *Section A.1: User level access to commands*.

4. Click **Test** to check that the password meets the complexity rules. The rules are defined in the **Edit** > **Program Options** > **Security** > **Password** tab.

5. Click **OK** after entering the information for the new user.

Note: For proper operation, EasyLobby SVM and Administrator require that the logged in Windows user has write permission for the EasyLobby installation folder (and subfolders). This is typically C:\Program Files (x86)\EasyLobby\EasyLobby SVM 10.0 unless you selected a different folder during installation. For further details of the permissions available to each user level, see *Section A.1: User level access to commands*.

3.3.2   Edit and delete user names and passwords

To edit or delete a user in EasyLobby SVM or Administrator:

1. Click **Edit** > **Users**.

2. To change or delete a user, highlight a user name in the list. Its security level is shown to the right. The password is shown as a series of asterisks. Modify the information for the user.
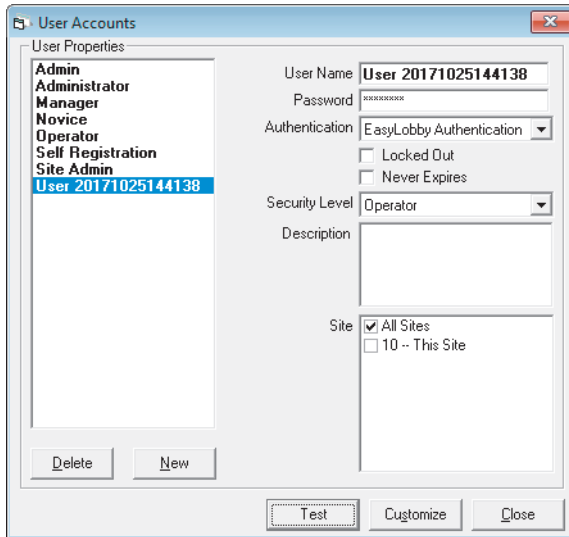
3. Click **Delete** to delete the user..
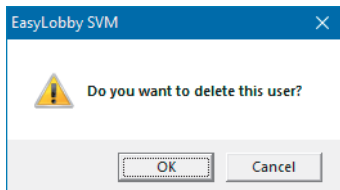
4. Click **Close** after editing.

3.3.3 Set up custom security levels

To create custom security levels for users in EasyLobby SVM or Administrator:

1. Click **Edit** > **Users**.
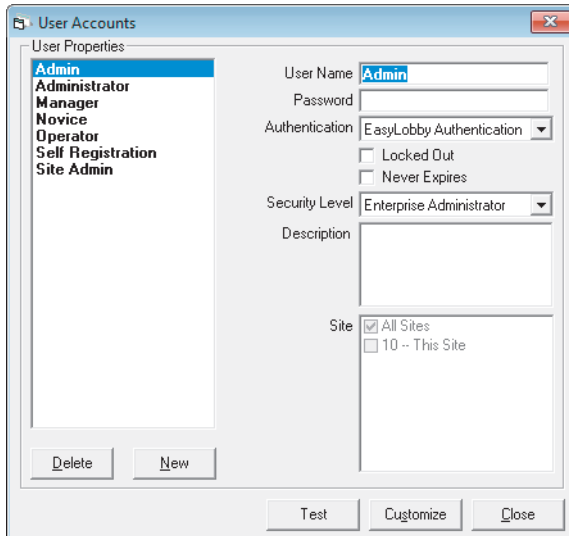
2. Click **Customize** to customize a user security level.
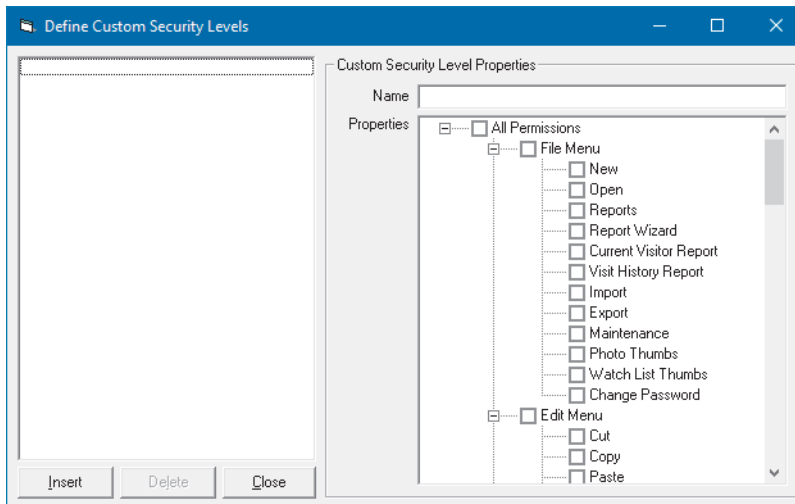
3. Click **Insert** to create a new security level. In the **Name** field, type a name for this security level. To change the properties for the security level, check items in the **Properties** box.
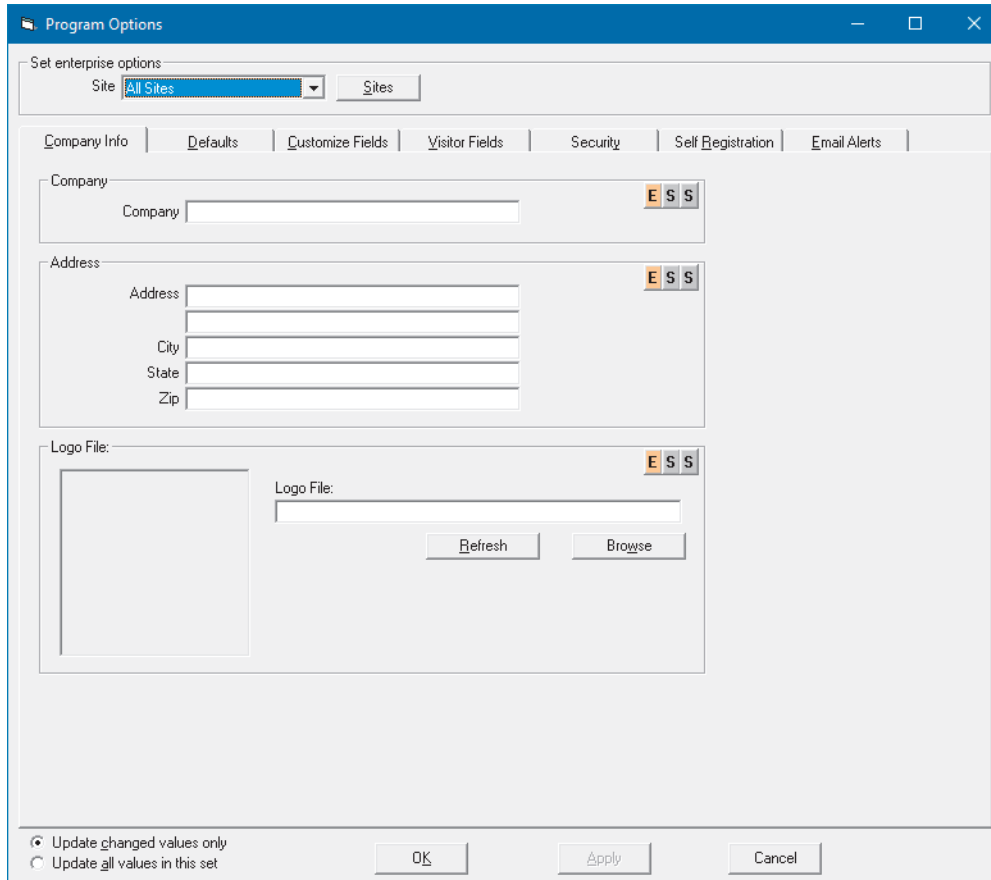
   Note: A new security level has All Permissions available. You must turn off the permissions that you do not want for the new level.

4. Click **Close**. The custom security level is now available to assign to a user.

   Note: For proper operation, EasyLobby SVM and Administrator require that the logged-in Windows user has write permission in the EasyLobby installation folder (and subfolders). This is typically C:\Program Files (x86)\EasyLobby\EasyLobby SVM 10.0 unless you selected a different folder during installation. For further details of the permissions available to each user level, see *Section A.1: User level access to commands*.

3.4   Program options

Program options include company information, defaults, customize fields, visitor fields, security, self-registration, and email alerts.

To open the program options:

- Click **Edit** > **Program Options**.
- Depending on your user level, you can select the settings for All Sites or a particular Site and Station (see *Appendix A: User level access to commands*).

  Note: Make sure you are setting the options for the correct site and station. You can check the computer's site and station from **Edit** > **Station Enrollment**.

  When you select **All Sites** or **All Stations**, the **Update changed values only** and **Update all values in this set** options are displayed at the bottom of the window. If you select **Update all values in this set**, every setting under every tab is reset. Proceed with caution as you could be changing a value you did not intend to change.

- The information can be set at the enterprise or site/station level depending on whether you are logged in as an enterprise administrator or site administrator.
- The ability to change the settings is also dependent on whether the enterprise administrator has selected that an option may be changed at a site or station level or only at the enterprise level.
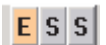
3.4.1   Company Info tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.
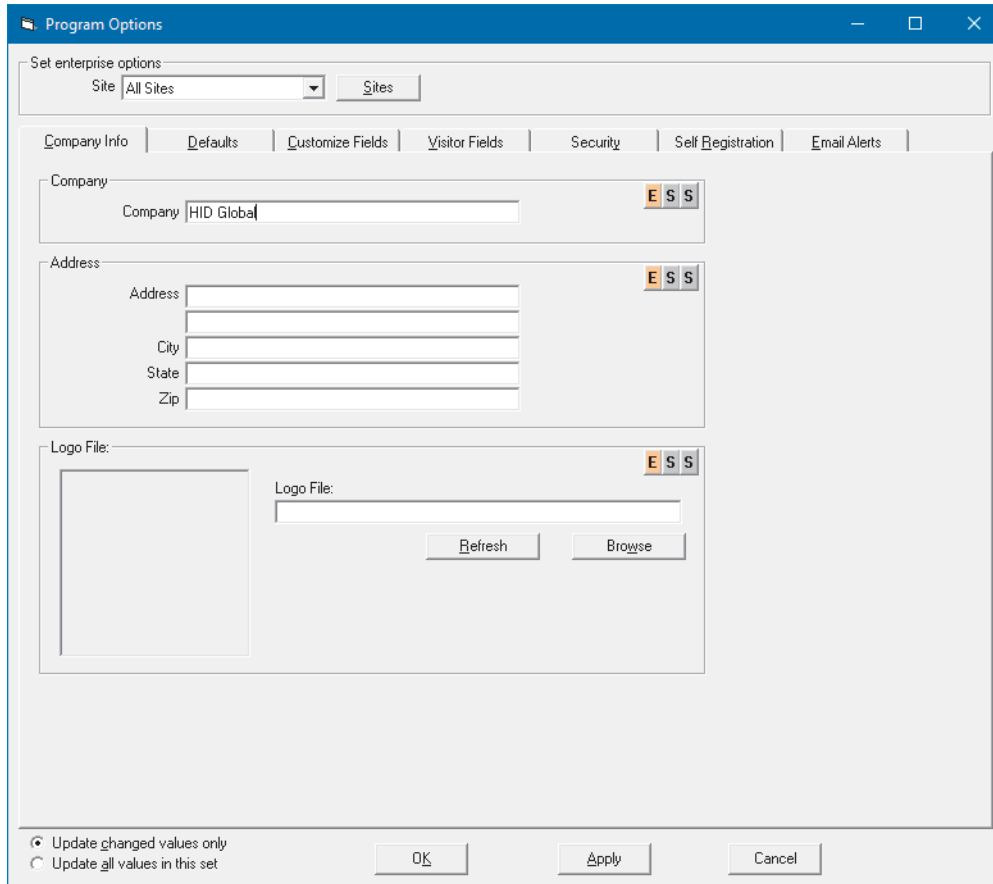
Select **All Sites** or a particular site on the drop-down. Click **Sites** to add, delete, or edit a site.

- Company

    Company: Type your company name.

- Address

    Type your company address. This information is used if you print a shipping label or other label that includes your own company information as a return address.
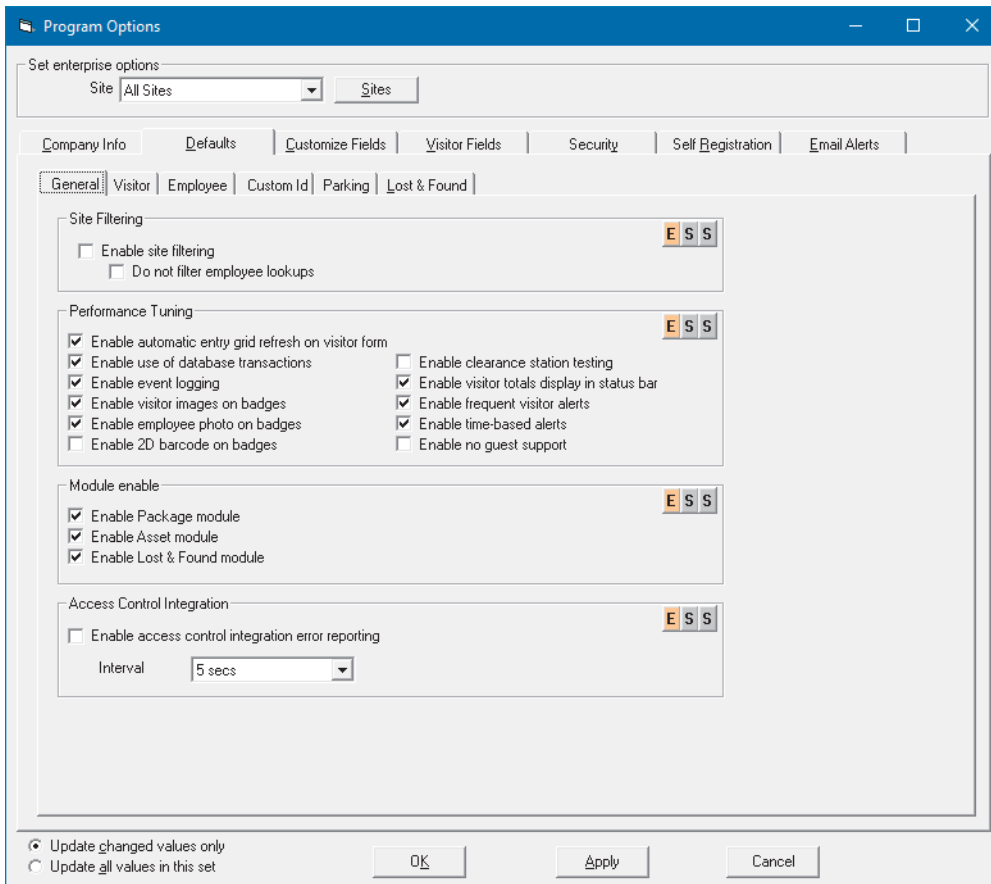
- Logo file

    Logo File: Click **Browse** to select a file containing your company logo. The logo appears on your badge designs. The logo file may be stored in JPG, BMP, PCX, WMF, or EMF format. Click **Refresh** to refresh the thumbnail image.

3.4.2 Defaults tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.

Default values allow you to enter visitor records faster by using prepopulated values. If you select a specific site and station in the **Set enterprise options** area, each workstation can have different default values.

3.4.2.1 General tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.

- Site Filtering

  Enable site filtering allows you to display visitors and employees for the specified site only.
  Do not filter employee lookups ensures all employees are shown, regardless of their site.

- Performance Tuning

  Enabling or disabling these settings can increase or decrease the system response time depending on the number of records in your database.

- Module Enable

  Enable or disable the Package, Asset, and/or Lost and Found modules as required. Disabling a module you don't intend to use removes it from the menu, simplifying the EasyLobby interface.

- Access Control Integration

  Enable access control integration error reporting sets the interval at which access control errors are updated. Refer to *EasyLobby SVM 10.4 Product Suite General Specifications* (PLT-03261) for more information about access control integration.

3.4.2.2 Visitor tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.

This screen allows you to control the default settings that apply to visitor records.

- Employee list

  Show Name Only shows only the employee's name when selecting the host from the employee drop-down on the visitor form.

  Show Additional Fields shows the selected fields on the employee drop-down on the visitor form.

- Sort By

  Sorts the employee list by the selected field.

- Grid Options

  Enable grid refresh every sets the time interval in seconds to refresh the visitor grid to display newly entered information.

  Display Grid Legend turns on/off the panel of status icons and meanings below the visitor grid.

- Form Options

    Country is used as the default when creating a new visitor. The country is placed in the **Contact Info** tab on the form view when an operator creates a new visitor record.

    Make type-in fields uppercase forces the information typed into a field into uppercase, allowing the user to type the letters regardless of case.

    Use multiple visitor forms toggles between displaying one visitor form at a time, or a visitor form for each visitor selected.

    Employee combo refresh every sets the time interval in minutes to refresh the Employee field to display newly entered employees.

- Valid From/To Defaults:

    These time values are used as the defaults for the badge when creating a new visitor. You can either type values or use the arrow buttons to adjust times. In the **Future date** selector you can use the drop-down arrow to select a date, but you must click the hour/minute to type new values.

    Grace period allows the visitor to check in earlier than the specified From time.

- Returning Visitor Defaults:

    Copies the selected fields from the visitor's prior visit to their current visit when using the Returning Visitor feature. See *Section 6.3: Add a returning visitor*.
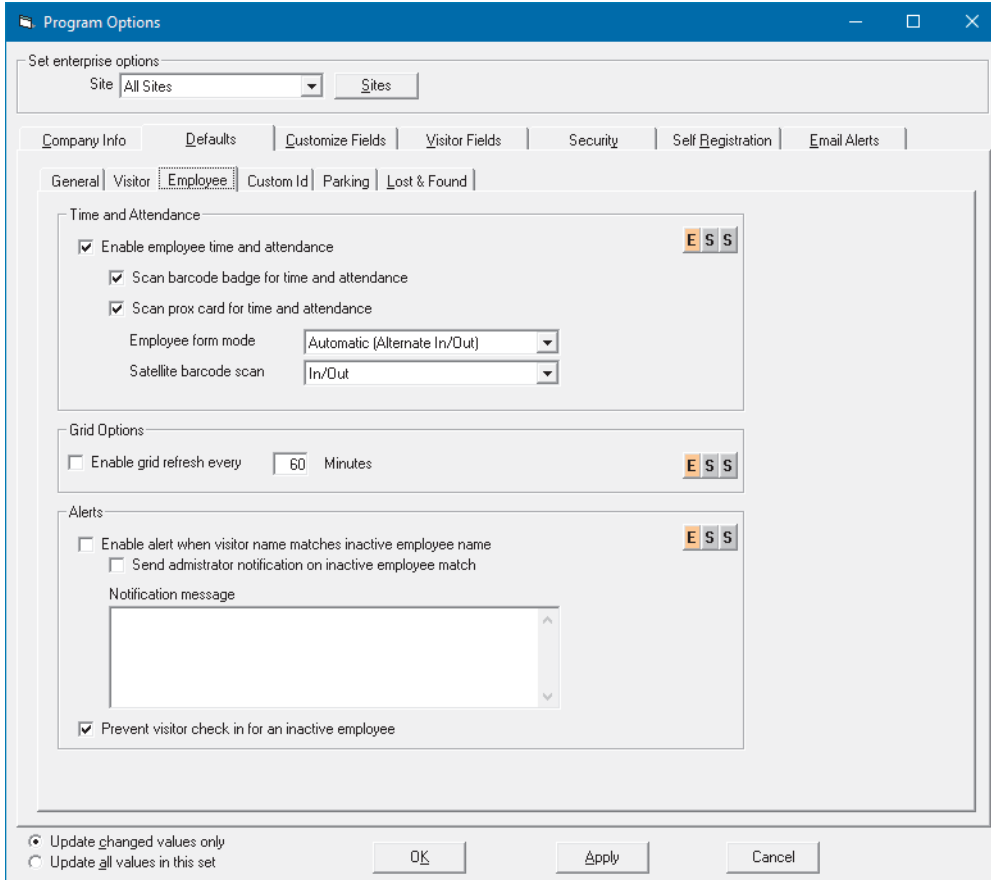
    Open record from previous visit: Normally, the Returning Visitor function copies information from the previous visit and creates a completely new visitor record. This option will open the record from the visitor's previous visit, ready to be updated. This prevents multiple visitor records being created for the same visitor, which reduces the database size.

    Update valid to time to current default: This option is used in conjunction with *Open record from previous visit*. Usually, the previous visit record will hold an expired Valid To time, so you cannot check in the record. This setting updates the Valid From and Valid To fields to the current system defaults so that the record can be checked in successfully.

    Do not use existing authorized record: Normally, EasyLobby will open the existing record if you use the Returning Visitor function while the visitor has a currently active visitor record. With this option selected, EasyLobby will create a new record instead of opening the existing active record.

3.4.2.3 Employee tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.

- Time and Attendance

    Enable employee time and attendance enables tracking employee's time and attendance when they check in/scan in and out.

    Scan barcode badge for time and attendance scans the employee's barcode badge.

    Scan prox card for time and attendance scans the employee's proximity card.

    Employee form mode sets the scan behavior:

    - **Automatic** displays the employee form and checks out an employee who was already checked in. The next scan after that will check in the employee, etc. for the duration of their valid from/to period.
    - **Prompt** asks you to either check in or check out the employee.
    - **Manual** displays the employee form for you to manually check in or check out the employee.
    - **Fully Automatic** checks out an employee who was already checked in, without displaying the employee form. The next scan will check in the employee, etc. without displaying the in/out dialog.

Visit by Employee: When an employee from another site visits, this function copies basic information from their employee record into a new visitor record.

Satellite barcode scan determines if a satellite station can be used by the employee to check in, check out, or both.

- Grid Options

  Enable grid refresh every sets the time interval in seconds to refresh the employee grid view to display newly entered information.

- Alerts

  Enable alert when visitor name matches inactive employee name determines whether an alert displays when an inactive employee's name matches the visitor's name.

  Send administrator notification on inactive employee match enables an email to the administrator when an inactive employee's name matches the visitor's name.
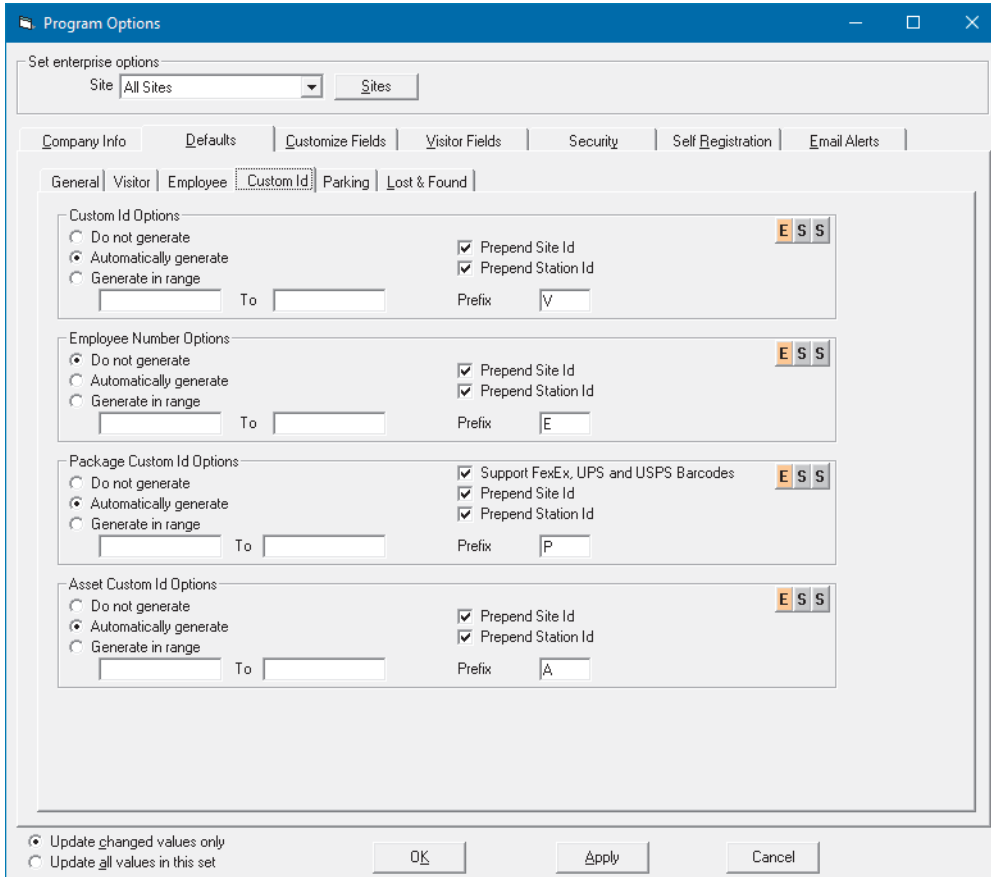
  Notification message specifies the message to display for these alerts.

  Prevent visitor check in for an inactive employee displays an alert if a preregistered visitor was assigned to an employee who has since become inactive (left the company). The visitor must be assigned to an alternative employee before they can check in.

3.4.2.4 Custom Id tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.

These settings allow you to customize the number sequence used for unique identifiers assigned to visitors, packages, or assets.

Identical settings are provided for custom Id, employee number, package custom Id and asset custom id options:

■ Options

Do not generate does not create a custom Id.

Automatically generate automatically increments the Id number generated by EasyLobby. The Custom Id field is located on the **Badge** tab of the form view when you create a new record. It can be printed on badges and used for quick check-out or barcode check-out. The Custom Id has a maximum length of 16 digits.

Generate in range generates an incrementing custom Id for each visit that is within the range entered in the boxes.

Prepend Site Id puts the site Id number before the custom Id for each visit.

Prepend Station Id puts the station Id number before the custom Id for each visit.

Prefix puts the entry before the custom Id for each visit.

3.4.2.5 Parking tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.
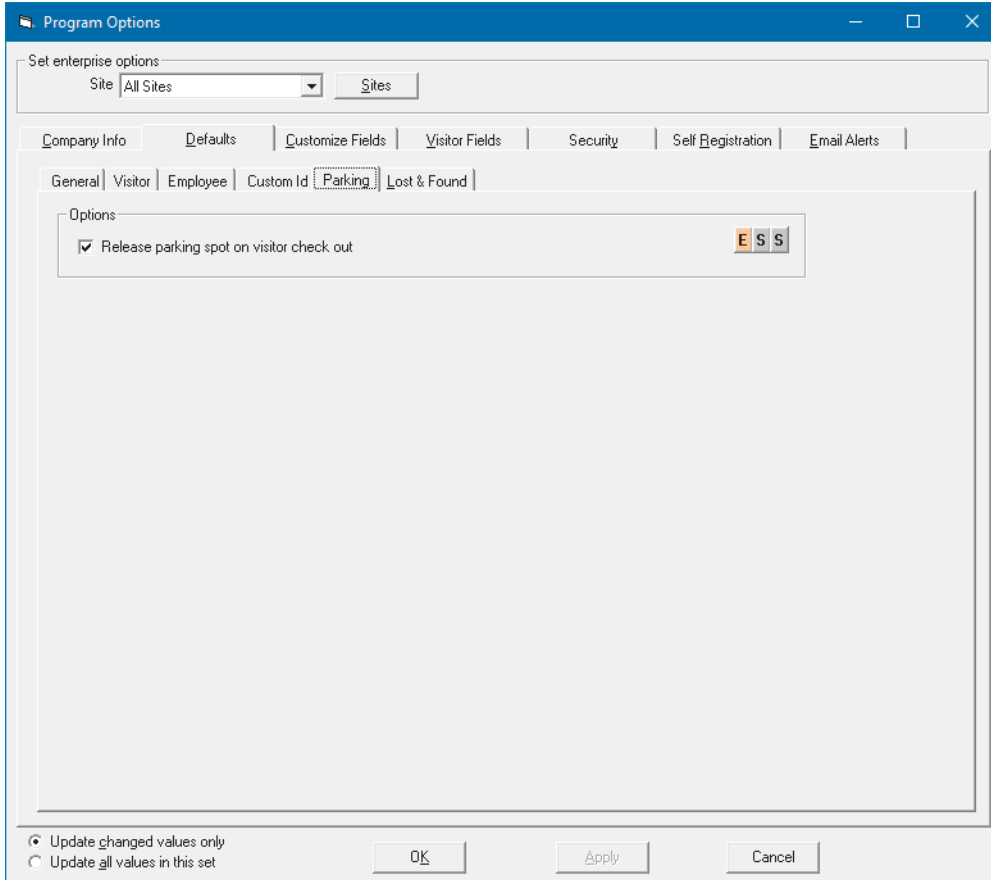
- Options

    Release parking spot on visitor check out shows the parking space as available when the visitor checks out.

3.4.2.6 Lost & Found tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.
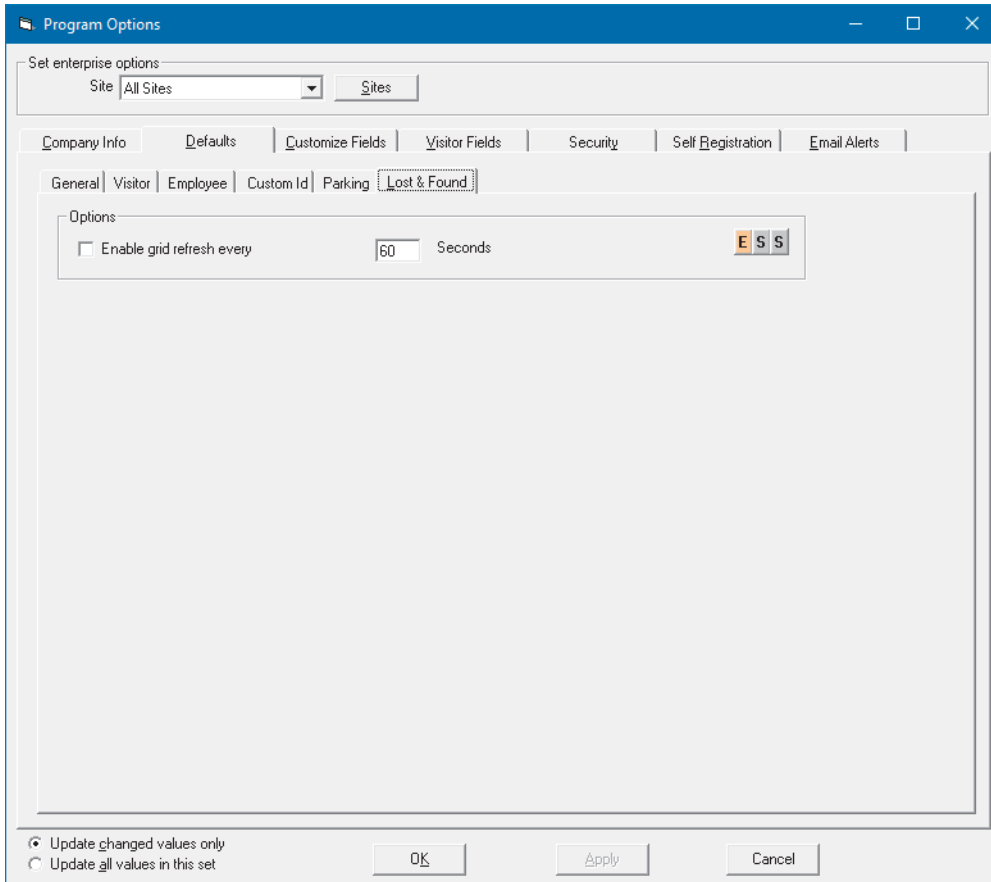
■ Options

   Enable grid refresh every refreshes the Lost & Found grid view at the specified interval.

3.4.3 Customize Fields tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.

In the **Customize Fields** tab, you can specify user-defined fields for:

- Visitors: 24 user-defined fields
- Employees: 12 user-defined fields
- Packages: 6 user-defined fields
- Assets: 6 user-defined fields
- Asset loans: 6 user-defined fields

For example, you may want to use these fields to capture information for license plate numbers, destination areas, notes, messages, etc. User-defined visitor fields are shown in the visitor form view under the **UD 1-6** tab (and **UD 7-12**, **UD 13-18** and **UD 19-24** tabs, if enabled) which appear between the **Signature** and **Entry** tabs. You can rename these tabs, so they may not appear as UD1-6, etc. For details of all fields contained within a visitor data record, see *Section A.6.1: Visitor data*.
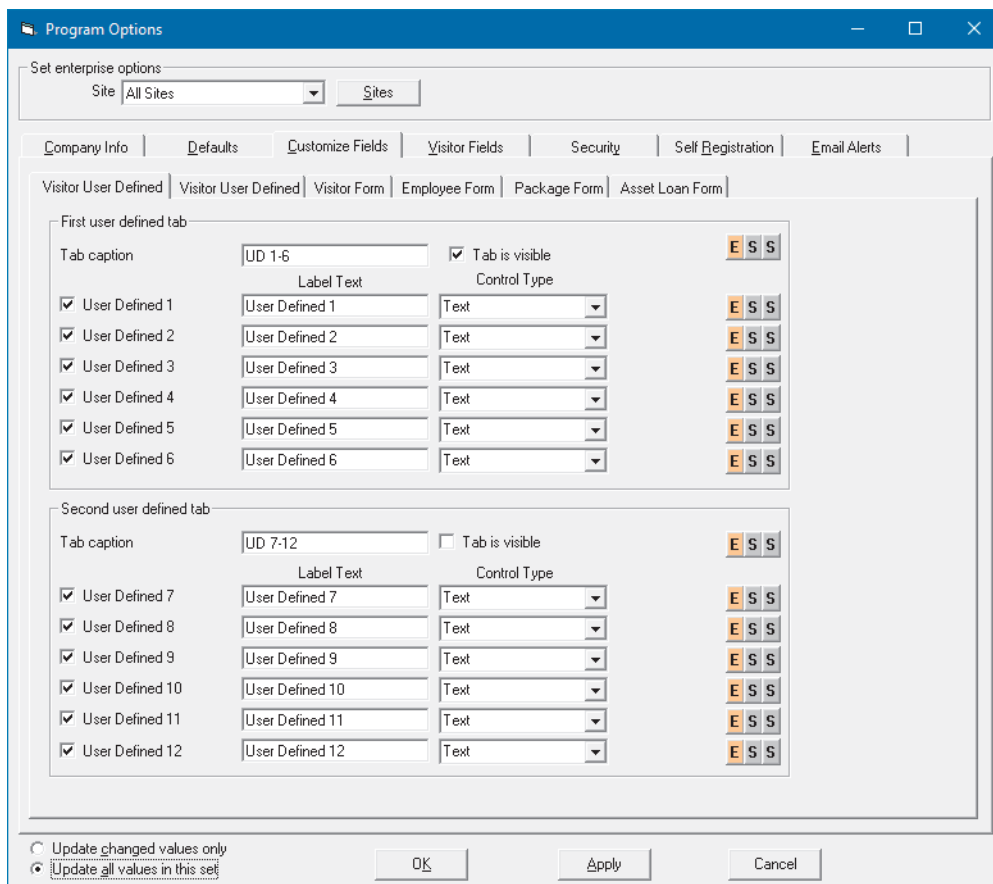
3.4.3.1 Visitor User Defined tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.

There are two **Visitor User Defined** tabs, one for fields 1–12 and one for fields 13–24.

1. In the **Tab Caption** field, type a name for the custom information tab.

2. To display a particular field, select the required **User Defined** *n* option. If the option is not selected, the user-defined field is not displayed on the visitor form.

3. Type a label for the field and select the control type. The **Control Type** is the type of field presented to the user. Control types are:

   - Text: An open text box to hold text or numbers.
   - Checkbox: An on/off control to indicate that something is true or has been selected.
   - Combo (drop-down): Displays a list of items to choose from. The **Edit Items** button is displayed so you can specify the available items for the drop-down.
   - Date: A date selection control. Using the Date control for a user-defined field select today's date by default.

4. Click **OK**.

3.4.3.2 Visitor Form tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.
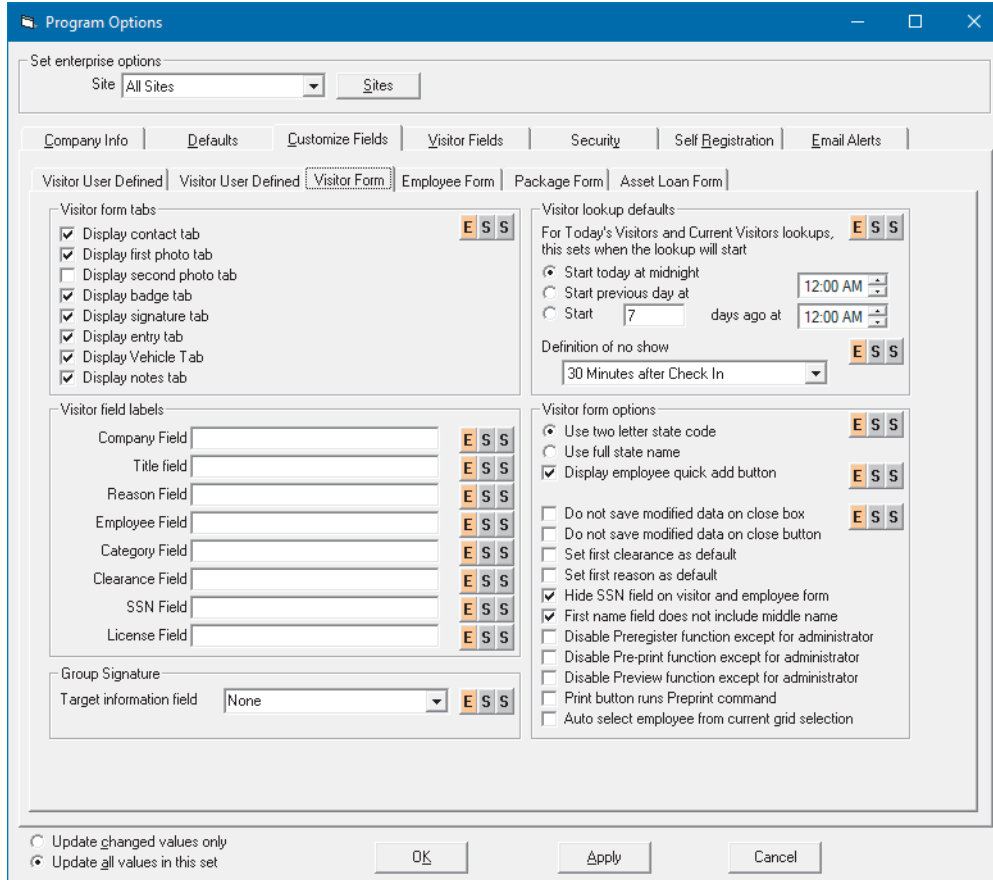
- Visitor form tabs

    The various **Display** options allow you to set which tabs appear on the visitor form view. For example, if you do not collect a visitor's signature or vehicle details, you can clear these options.

- Visitor field labels

    The **Field** options allow you to change the label for the eight fields that appear at the top of the visitor form view. For example, if you type Organization in the **Company Field** box, the visitor form will display the label Organization instead of Company. Changes to these fields also affect the main menu items, so entering Staff in the **Employee Field** box changes the Employee menu to Staff.

    Note: Do not use any symbol characters, for example \, $, @, in your field names. Use only uppercase or lowercase characters a to z.

- Group Signature

    Target information field selects the user defined field in the visitor record in which the group signature will be saved. A group signature allows a single person to sign for multiple visitors. Select the relevant visitors in the visitor grid view (using Shift and/or Ctrl+click) then click **Visitor** > **Group Signature**. A group signature can also be used to sign for multiple packages in package grid view. See *Section 6.17: Manage a group of visitors*.

- Visitor lookup defaults

    Sets the date and time ranges that will be used when filtering visitors using the **Visitor** > **Lookup** > **Today's Visitors** (or **Current Visitors**) menu options.

    Definition of no show sets the period after which a visitor will be considered to have failed to arrive for their visit (a 'no show'). These visitors can be filtered by choosing **Visitor** > **Lookup** > **No Show**.

- Visitor form options

    Use two letter state code / **Use full state name** sets the preferred appearance of the State drop-down.

    Display employee quick add button displays a small ⊞ button next to the Employee drop-down, allowing a new employee host name to be quickly added. Note that when you select an employee in this manner, you can only enter the name, and not additional data such as title, department, etc.

    Do not save modified data on close box prevents changes to the visitor form being saved when you click the window's ⊠ close button. When this is selected, it prevents data being unintentionally saved when you intended only to close/cancel the visitor form.

    Do not save modified data on close button prevents changes to the visitor form being saved when you click the **Close** button. This prevents data being unintentionally saved when you intended only to close/cancel the visitor form. The **Save** button must be used to save changes.

    Hide SSN field on visitor and employee form obscures the ID Number field by replacing the contents with asterisks.

    First name field does not include middle name tells EasyLobby that the complete text in the first name field should be considered as the first name, even if it contains a space, for example Sarah Jayne. If this option is not selected, EasyLobby will assume anything after the space is a middle name and will ignore it. This can be important when finding matches or sending the name to a screening service.

    Disable Preregister function except for administrator prevents all user levels, except administrators, from preregistering a visitor.

    Disable Pre-print function except for administrator prevents all user levels, except administrators, from preprinting a visitor badge.

    Disable Preview function except for administrator prevents all user levels, except administrators, from previewing a visitor badge.

    Print button runs Preprint command prevents immediate printing of the badge, instead showing the preprint option.

    Auto select employee from current grid selection: If the employee grid view is open with an employee selected, the employee's name will automatically be entered in the employee box on the visitor form when creating a new visitor.

3.4.3.3 Employee Form tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.
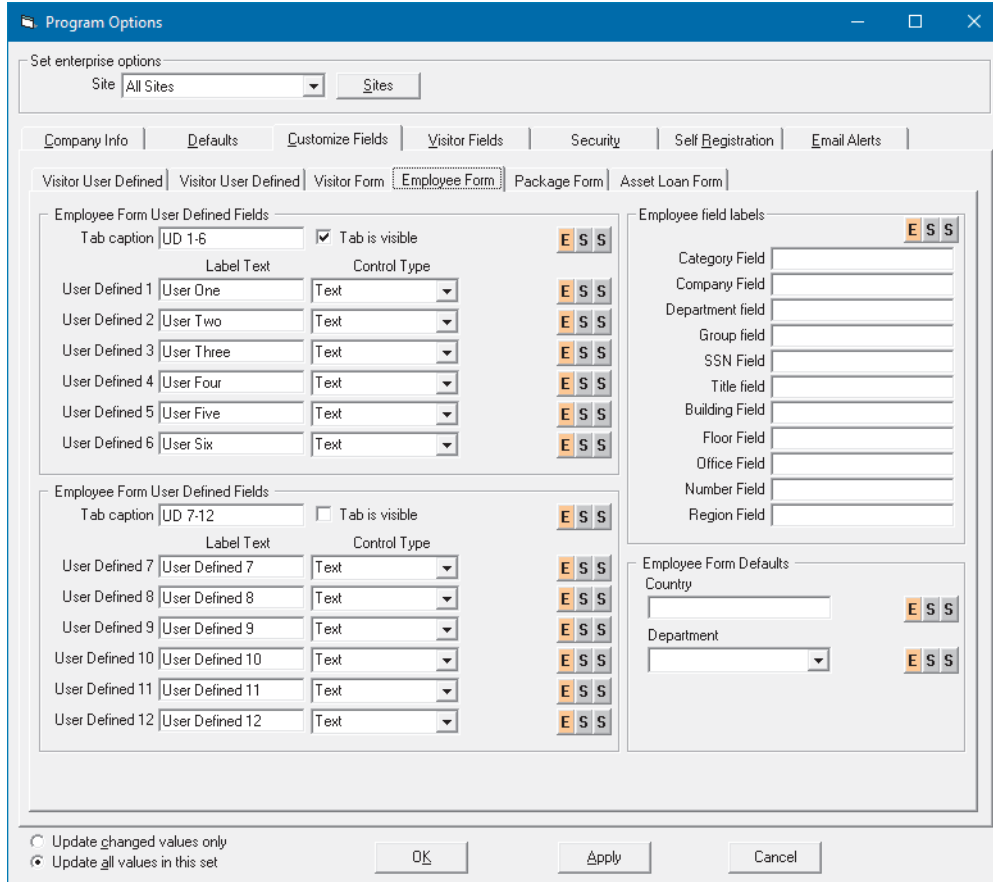
- Employee Form User Defined Fields

  Tab caption: Type a title for the tab. Two tabs are used to show user defined fields 1-6 and 7-12.
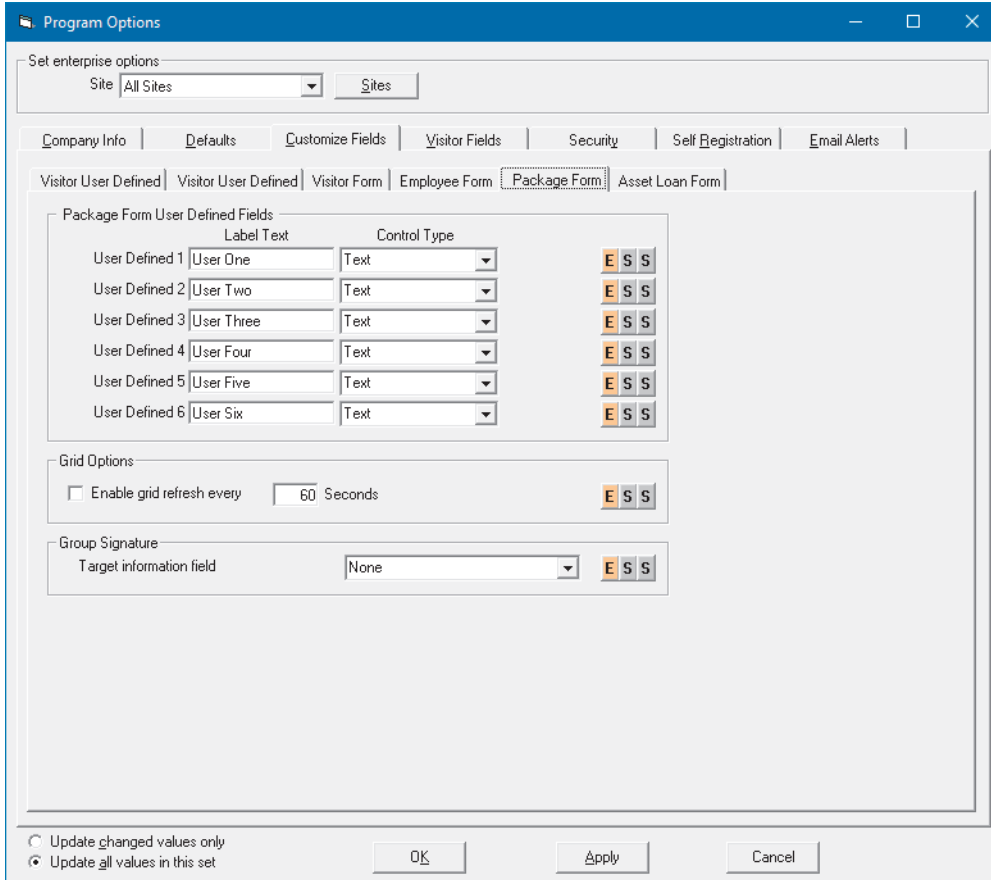
  Tab is visible makes the additional tab appear on the employee form to display the user defined fields.

  User Defined *n*: Type a label for the field and select the control type. The **Control Type** is the type of field presented to the user. Control types are:

  - Text: An open text box to hold text or numbers.
  - Checkbox: An on/off control to indicate that something is true or has been selected.
  - Combo (drop-down): Displays a list of items to choose from. The **Edit Items** button is displayed so you can specify the available items for the drop-down.
  - Date: A date selection control.

3.4.3.4 Package Form tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.


- Package Form User Defined Fields

  User Defined *n*: Type a label for the field and select the control type. The **Control Type** is the type of field presented to the user. Control types are:
  - Text: An open text box to hold text or numbers.
  - Checkbox: An on/off control to indicate that something is true or has been selected.
  - Combo (drop-down): Displays a list of items to choose from. The **Edit Items** button is displayed so you can specify the available items for the drop-down.
  - Date: A date selection control.
- Grid Options

  Enable grid refresh every refreshes the Package grid view at the specified interval.

3.4.3.5 Asset Loan Form tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.
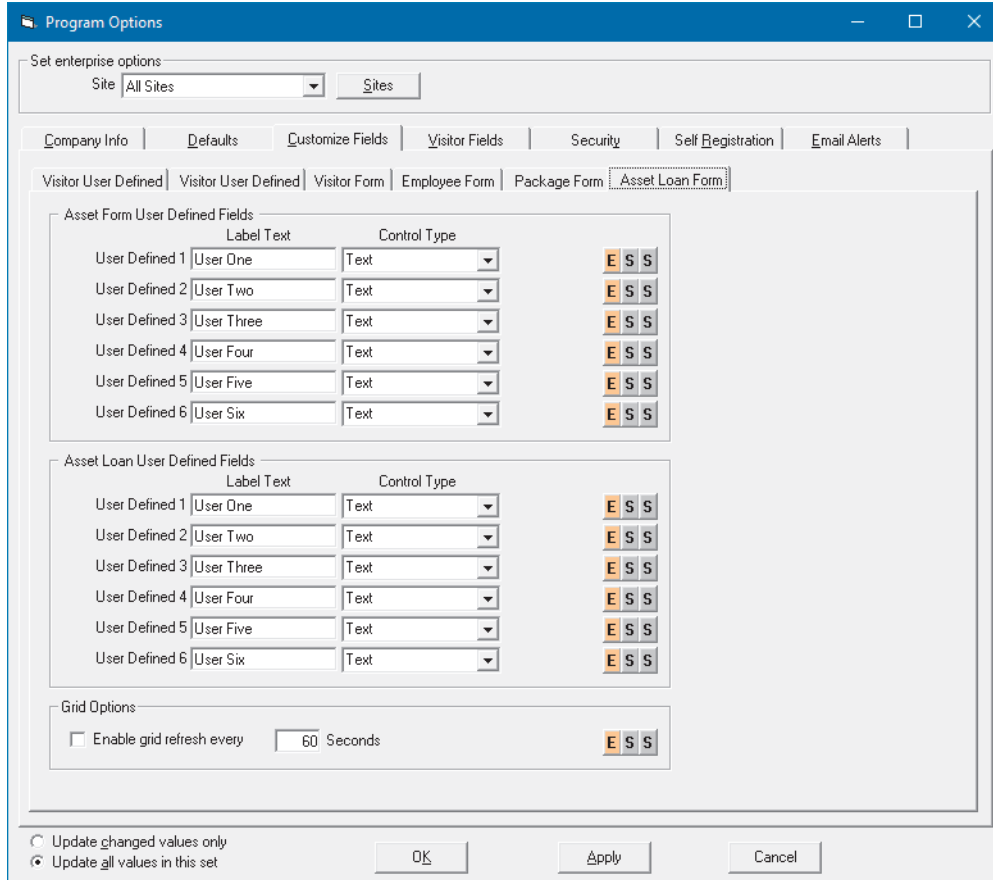

- Asset Form User Defined Fields

    User Defined *n*: Type a label for the field and select the control type. The **Control Type** is the type of field presented to the user. Control types are:
    - Text: An open text box to hold text or numbers.
    - Checkbox: An on/off control to indicate that something is true or has been selected.
    - Combo (drop-down): Displays a list of items to choose from. The **Edit Items** button is displayed so you can specify the available items for the drop-down.
    - Date: A date selection control.
- Grid Options
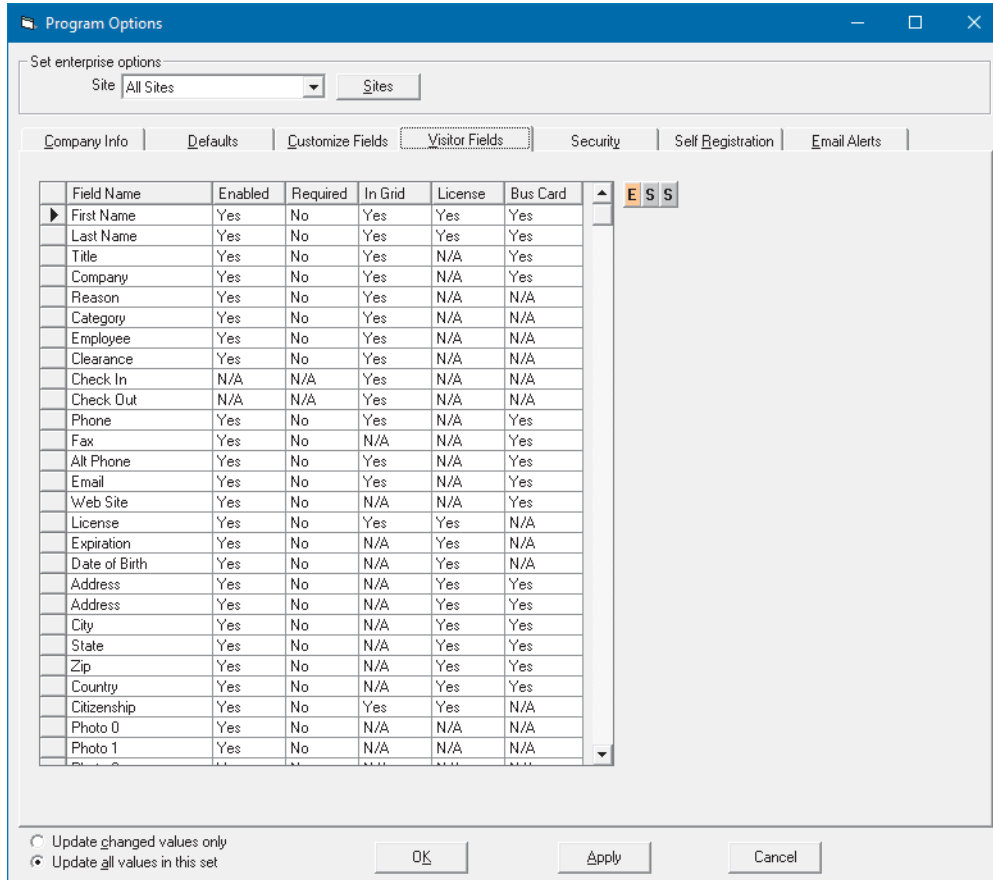
    Enable grid refresh every refreshes the Asset Loan grid view at the specified interval.

3.4.4   Visitor Fields tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.

The **Visitor Fields** tab allows you to select which fields will appear on the visitor form view and grid view.

You can set most of the fields on the visitor log to:

- **Enabled** toggles the field from enabled to disabled. **Yes** (enabled) allows the user to enter information into the field. **No** (disabled) prevents the user from entering information by graying out the field.
- **Required** toggles the field from required to not required. Required fields are indicated with an asterisk and must be completed before the visitor can be checked in.
- **In Grid** toggles the field to show or hide on the grid view.
- **License** sets which information is taken from a driver's license scan into the visitor log.
- **Bus Card** sets which information is taken from a business card scan into the visitor log.

Fields marked with N/A cannot be changed, as they are not applicable to the setting.

3.4.5 Security tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.

EasyLobby offers many options to secure and simplify the check-in and check-out of visitors. These settings are controlled using the **Security** tabs.

3.4.5.1 Check In tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.

- Check In

    Enable multiple check ins within authorized period

    Allow sequential check in without intervening check out: Allows you to check in a visitor multiple times until the badge expires without the visitor checking out in between visits. Using this setting allows visitors that might be frequently exiting and reentering the building to do so without having to check out every time they leave the building.

    In today's visitors lookup, don't show visitor on subsequent days after check in: Don't display a visitor if they checked in prior to today's date without a check-out. This option excludes visitors who have checked in for a long period from appearing on today's check-ins.

    In today's visitors lookup, only show preregistered visitors arriving today displays only preregistered visitors with an arrival date of today. This excludes visitors who were preregistered but never checked-in.

    In preregistered lookups, show visitors as preregistered on subsequent days after check in shows visitors as preregistered on the days after their initial check-in as opposed to showing them as already checked in. Using this setting allows you to see if a pre-registered visitor that is currently checked in is also expected to be on-site on future days.

On check in, prompt if visitor is already checked in prompts you when the visitor you are checking in is already checked in (they were not checked out from a previous visit).

On check in, disable data entry on all fields except by administrator or manager locks a visitor record when the visitor is checked in, so changes can not be made except by the administrator.

On check in at different site, set visitor site to new site edits the visitor record to reflect the site at which the visitor checked in.

- Watch List Options

    These settings allow you to enable the watch list function.

    On check in, prompt if name matches an entry in the watch list prompts you when the visitor you are checking in matches a person on the watch list (an unwelcome visitor). You can choose to match first and last name or last name only.

    On check in, prompt if company matches an entry in the company watch list prompts you when the visitor you are checking in matches a company on the company watch list.

    On check in, prompt if country matches an entry in the country watch list prompts you when the visitor you are checking in matches a country on the country watch list.

    On check in, prompt if citizenship matches an entry in the country watch list prompts you when the visitor's citizenship matches a country on the country watch list.
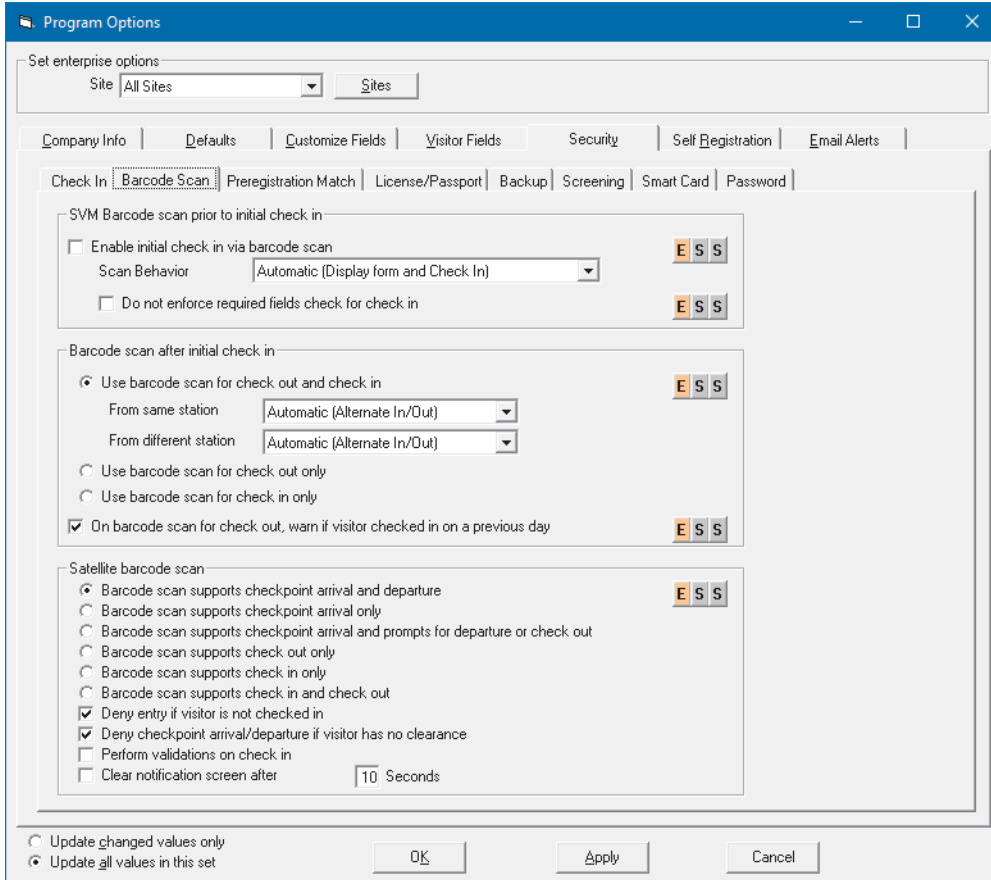
    See *Section 3.11: Alerts* for further details about using the watch list.

- Administrator proxy badge printing

    Enable administrator proxy badge printing is used with SVM Mobile to print visitor's badges, and sets the time interval in seconds for printing. Can be used with eKiosk to print visitor badges.

3.4.5.2 Barcode Scan tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.

- SVM Barcode scan prior to initial check in

    Enable initial check in via barcode scan prints a badge and checks in the visitor by scanning the barcode on the badge. This is particularly helpful when using a pre-printed badge.

    Do not enforce required fields check for check in allows a visitor who is preregistered and is checked in with a barcode scanner to not be subject to enforcement of required fields. Using this setting prioritizes speed of check-in over data collection standards.

- Barcode scan after initial check in

    Use barcode scan for check out and check in

    From same station / From different station:

    - **Alternate the check in and out** checks out a visitor who was already checked in. The next scan will check them out, the next scan after that will check them in, etc. for the duration of their valid from/to. A message is displayed on screen to indicate if the visitor was checked in or out. Using this setting assumes that visitor check out will be enforced every time they leave the building.

    - **Prompt** asks you to either check in or check out the visitor.

    - **Manual** displays the visitor's record for you to manually check in or check out the visitor.

- **Fully Automatic (In/Out, no form display)** automatically checks in or checks out the visitor without displaying an in or out form.

    On barcode scan for check-out, warn if visitor checked in on a previous day prompts you when the visitor you are checking out with a barcode scanner checked in on a previous day.

- Satellite barcode scan

    Deny entry if visitor is not checked in denies entry if the visitor is not checked in via a SVM station.

    Deny checkpoint arrival/departure if visitor has no clearance denies entry if the visitor is not assigned a valid clearance level.

    Clear notification screen after xx Seconds allows you to place a satellite station at an exit to use for visitors to check out when they leave. In this instance the satellite does not require personnel to check visitors out.

    Note: *Departure* means leaving the satellite; the visitor may go to another satellite or to the main lobby. *Check-out* means leaving the facility.

3.4.5.3 Preregistration Match tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.
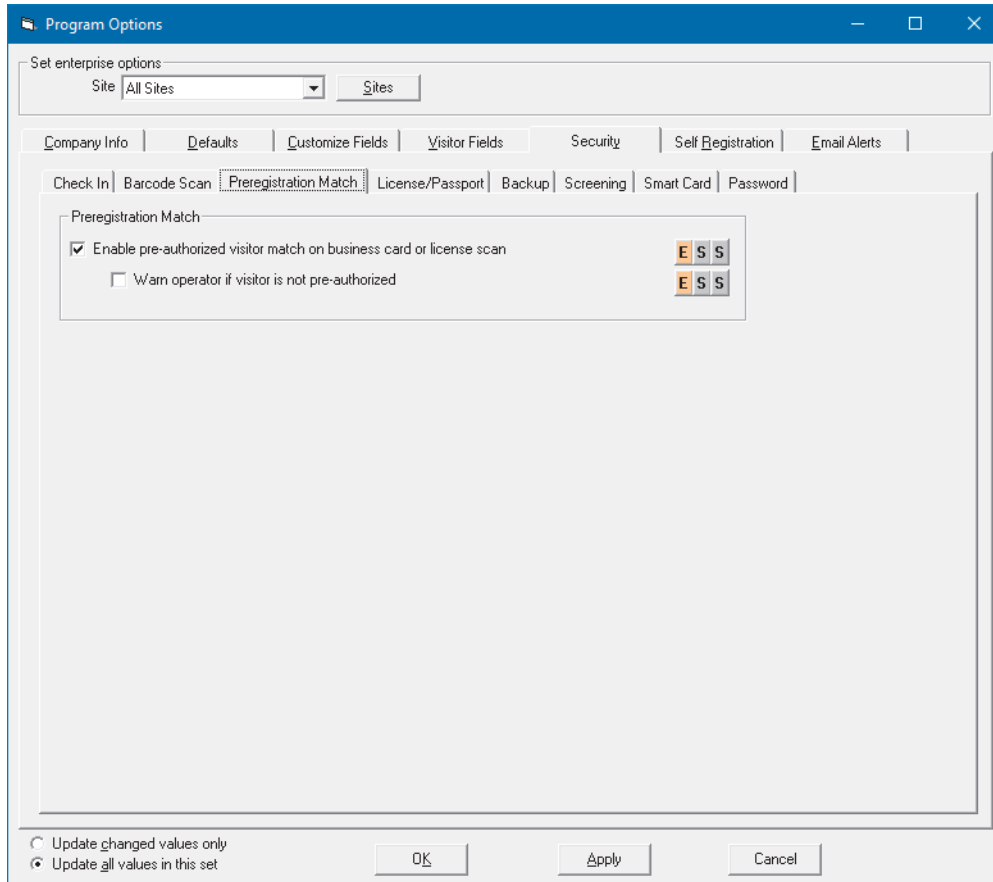
■ Preregistration Match

Enable pre-authorized visitor match on business card or license scan prompts you that the visitor whose business card or license you scanned is preregistered. The visitor's information can be updated with the scanned information.

Warn if visitor is not pre-authorized prompts you when the visitor whose business card or license you scanned is not preregistered. This setting is useful if your company requires all visitors to be preregistered.

3.4.5.4 License/Passport tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.
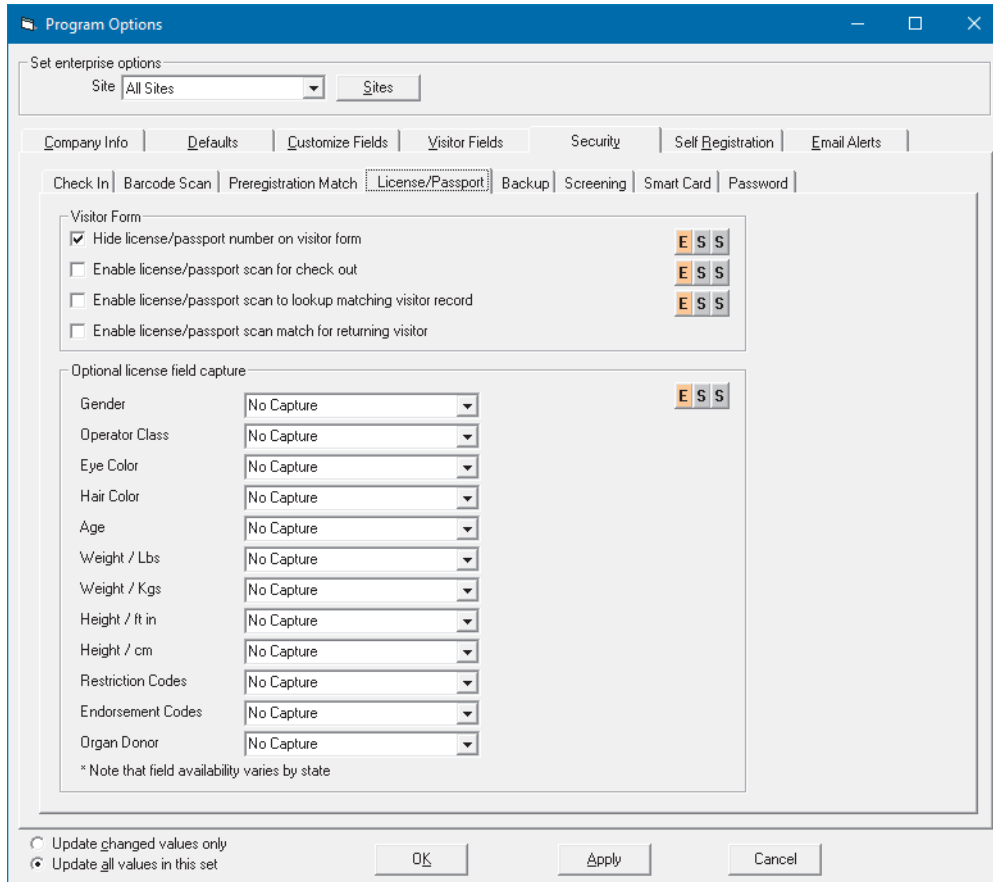
- Visitor Form

    Hide license/passport number on visitor form obscures the visitor's driver's license number by displaying it as asterisks in the EasyLobby user interface. However, the number is still saved in the database, and will be visible in saved/exported records.

    Enable license/passport scan for check out checks out a visitor who is checked in by swiping their driver's license through the driver's license reader.

    Enable license/passport scan to lookup matching visitor record looks up a visitor by swiping their driver's license through the driver's license reader.

- Optional license field capture

    These are additional fields that can be captured from the license/passport scan. Note that field availability varies by state. For each item that you wish to capture, select the destination field in the visitor record where the data will be stored. Fields such as Address, City, and State will be captured automatically if those fields are enabled in the Visitor Form. You can manage those fields through using the **Visitor Fields** tab (see *Section 3.4.4: Visitor Fields tab*).
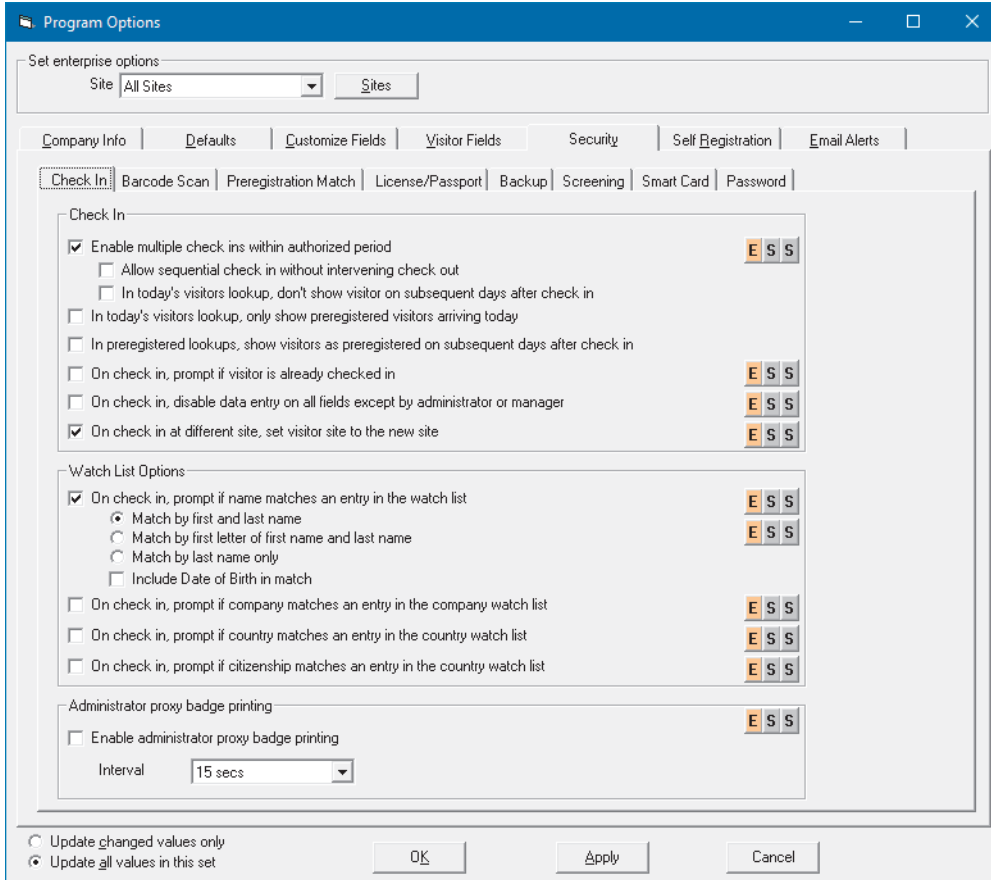
3.4.5.5 Backup tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.
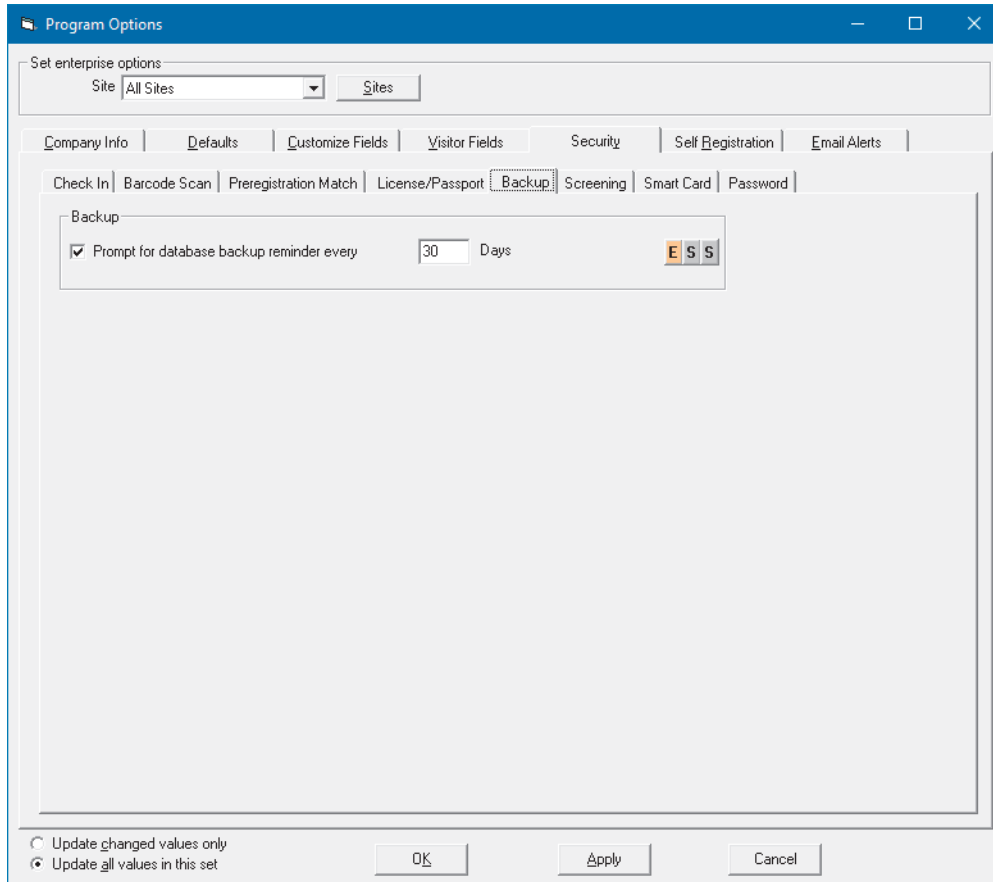
- Backup

    Prompt for database backup reminder every: When exiting EasyLobby, displays a prompt at the specified interval to remind you to backup the EasyLobby database. You may automate the database backup by using SQL tools.

3.4.5.6 Screening tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.
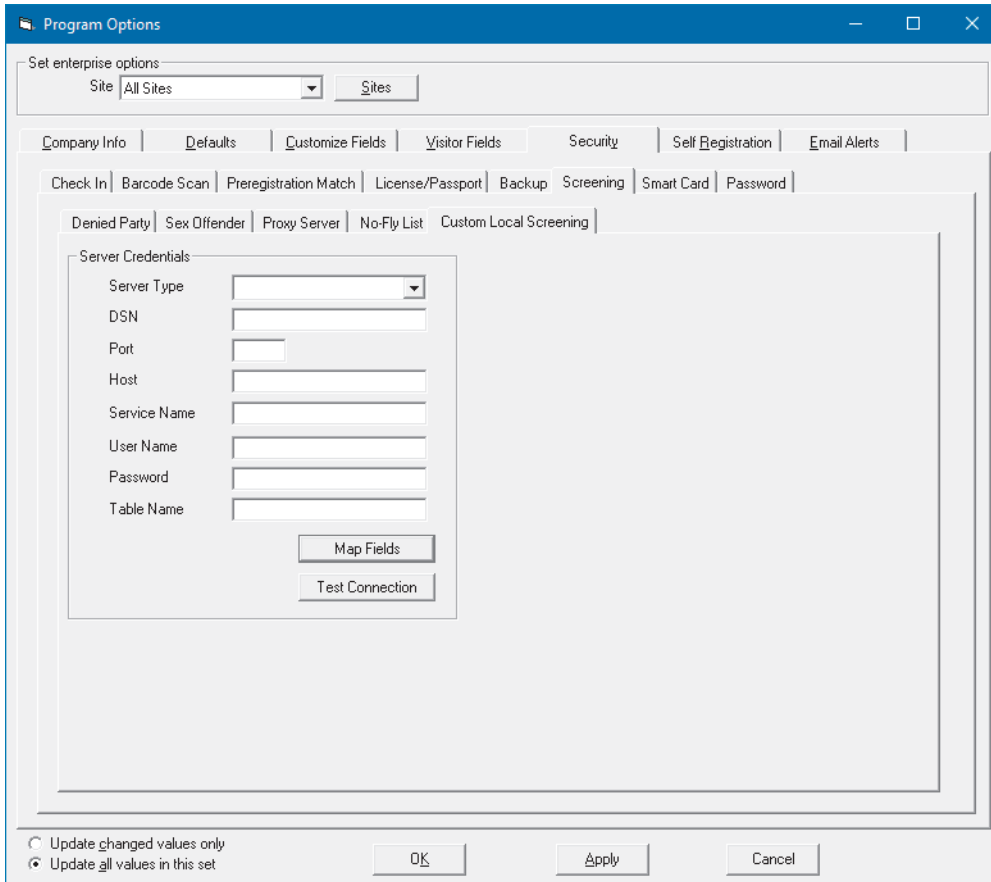
The Denied Party screening and Sex Offender screening are services that must be purchased from EasyLobby. The **Proxy Server** tab is used to set proxy server settings for these services.
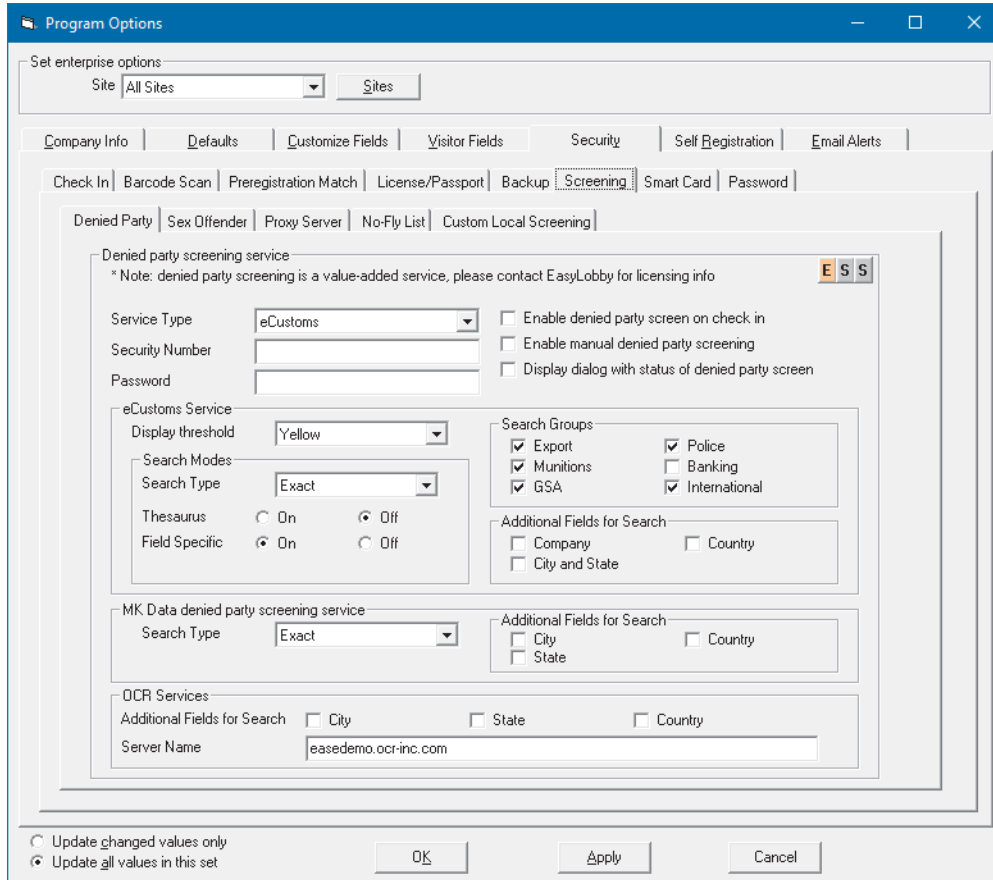
3.4.5.7 Custom Local Screening tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.

This tab allows you to set up a connection to an additional local screening database. This is a separate database that holds the names of people for whom a notification should be displayed if they are entered as a potential visitor. EasyLobby checks the details of the visitor and displays a notification if there is a match with a record in the custom local screening database.

- Server credentials

  Server Type selects the type of local screening database to which you will be connecting.

  DSN is the data source name (DSN) for the local screening database, the equivalent of EasyLobby10.

  Port: (Oracle only) The port number; usually 1521 for Oracle.

  Host: (Oracle only) The name of the computer on which the local database resides, e.g. DOMAIN\MACHINE.

  Service Name: (Oracle only) The database service name, the equivalent of EASYLOBBY.

  User Name is the user name required to connect to the database, the equivalent of easyuser10.

  Password is the password required to connect to the database, the equivalent of door10maN+.

Table Name is the name of the table within the local database that holds the details of individuals.

Map Fields:

1. Click **Map Fields**.

2. In each text box, type the name of the field in the local screening database (within the specified Table Name) that holds data equivalent to the EasyLobby field. In the example above, EasyLobby will read a field called SocSecNum in the local screening database and compare it with the EasyLobby SSN (SS Number) field in the visitor record when determining a match. Similarly, EasyLobby will read a field called CompOrg in the local screening database and compare it with the EasyLobby Company field when determining a match.
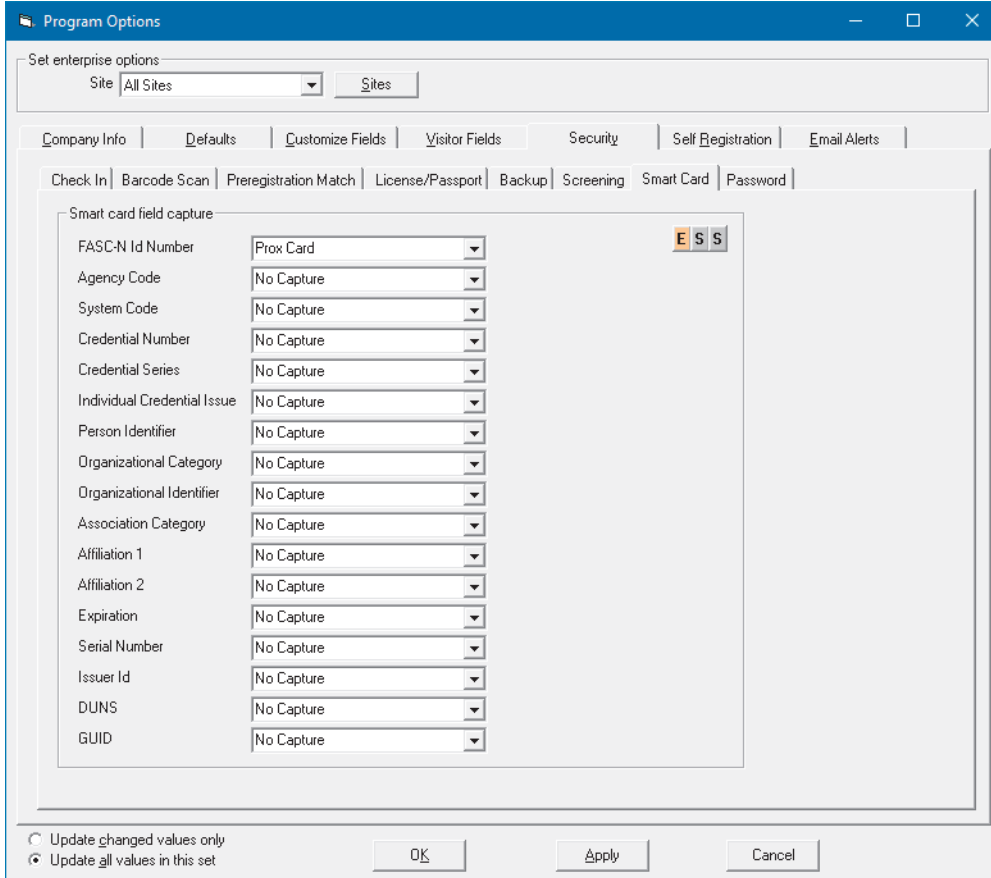
3. Click **Save and Exit**.

Test Connection tests the connection to the local screening database.

3.4.5.8 Smart Card tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.

These are fields that can be captured from the smart card reader. EasyLobby currently supports only the Hirsch RUU Smart Card reader and RF Ideas pcProx RDR-80081AK0 reader.

- Smart card field capture

    For each item that you wish to capture from the smart card, select the destination field in the visitor record where the data will be stored.

Note: Prox card settings are found in the **Device Options** > **Prox Card** tab (see *Section 3.6.4: Prox Card tab*).

3.4.5.9 Password tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.

This tab allows you to set rules for the complexity of passwords. These rules apply only to EasyLobby logins, and have no effect on Single Sign On (SSO) or Active Directory (AD) logins.
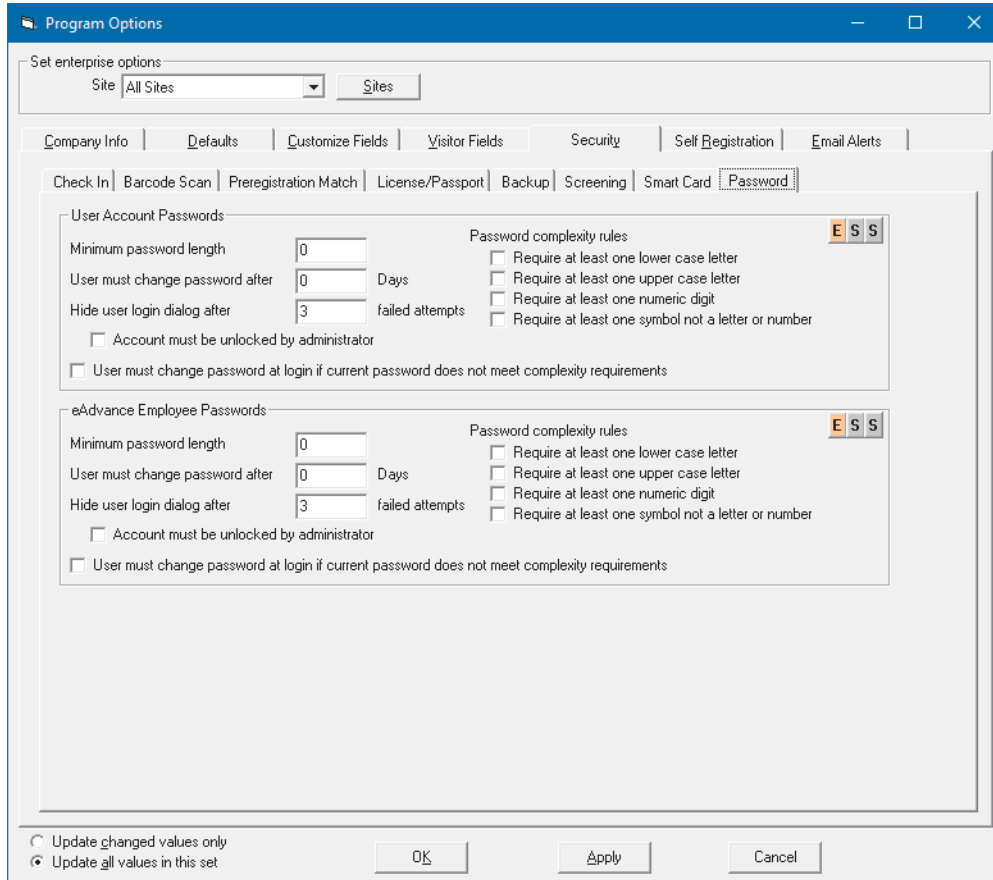
- User Account Passwords

    Minimum password length sets the minimum allowable length for the password. Set this to zero if you do not wish to enforce a minimum password length.

    User must change password after sets the period, in days, after which the user will be required to create a new password. Set this to zero if you do not wish to enforce password expiration.

    Hide user login dialog after hides the login box after the set number of failed login attempts. The user can reopen the login dialog and try again, provided the account has not been locked.

    Account must be unlocked by Administrator causes a user's account to become locked after reaching the set number of failed login attempts. The user will not be able to make further login attempts. An administrator must login to EasyLobby, click **Edit** > **Users**, and clear the **Locked Out** check box in the user's account information.

    User must change password at login if...complexity requirements causes the **Change Password** dialog to be displayed if the password does not satisfy the current complexity

requirements. The user must immediately create a new password that satisfies the listed requirements.

Password complexity rules select additional requirements for password complexity.

- eAdvance Employee Passwords

  This area provides the same options as the User Account Passwords section, but the settings apply to the login behavior and passwords used when logging in to eAdvance. Refer to *EasyLobby eAdvance 10 Installation and Administration Guide* (PLT-03263).
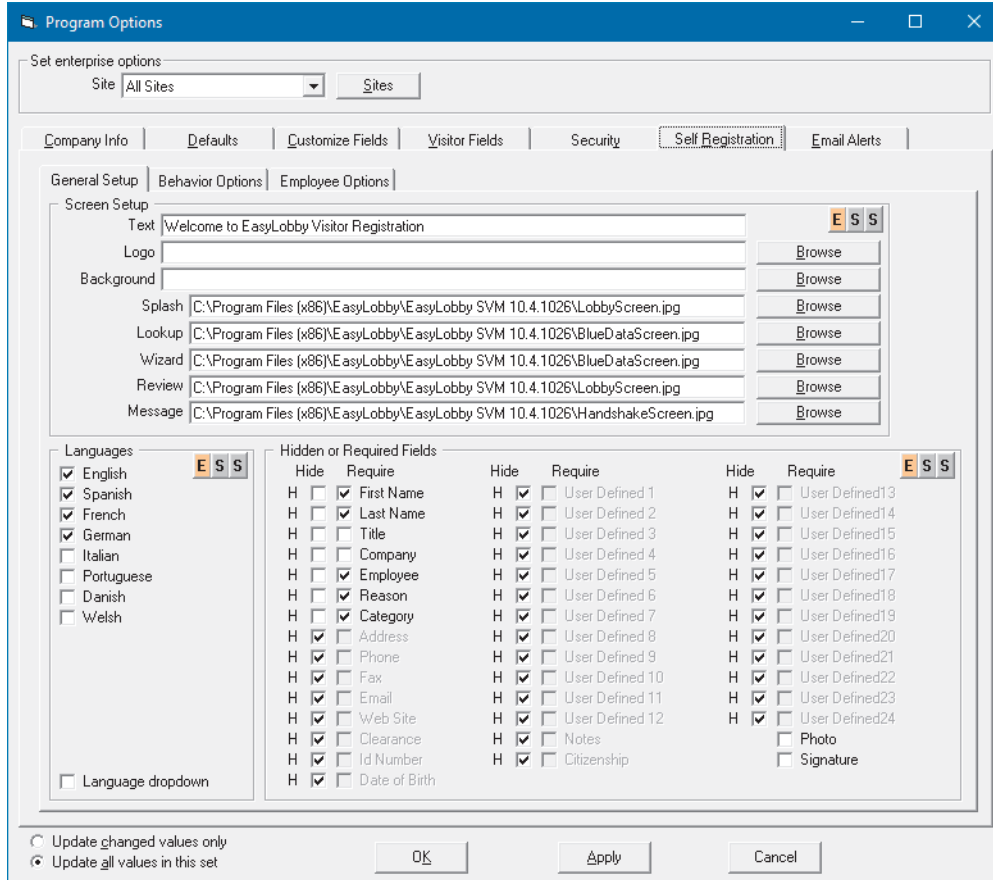
3.4.6 Self Registration tab

By setting up a self-registration station, EasyLobby can be used in a mode where visitors enter their information or swipe their ID to locate or create a visitor record, take their own picture, and print themselves a badge. You can customize the self-registration mode using the **General Setup** and **Behavior Options** tabs. See *Section 4.2.1: Start and login to self-registration mode*.
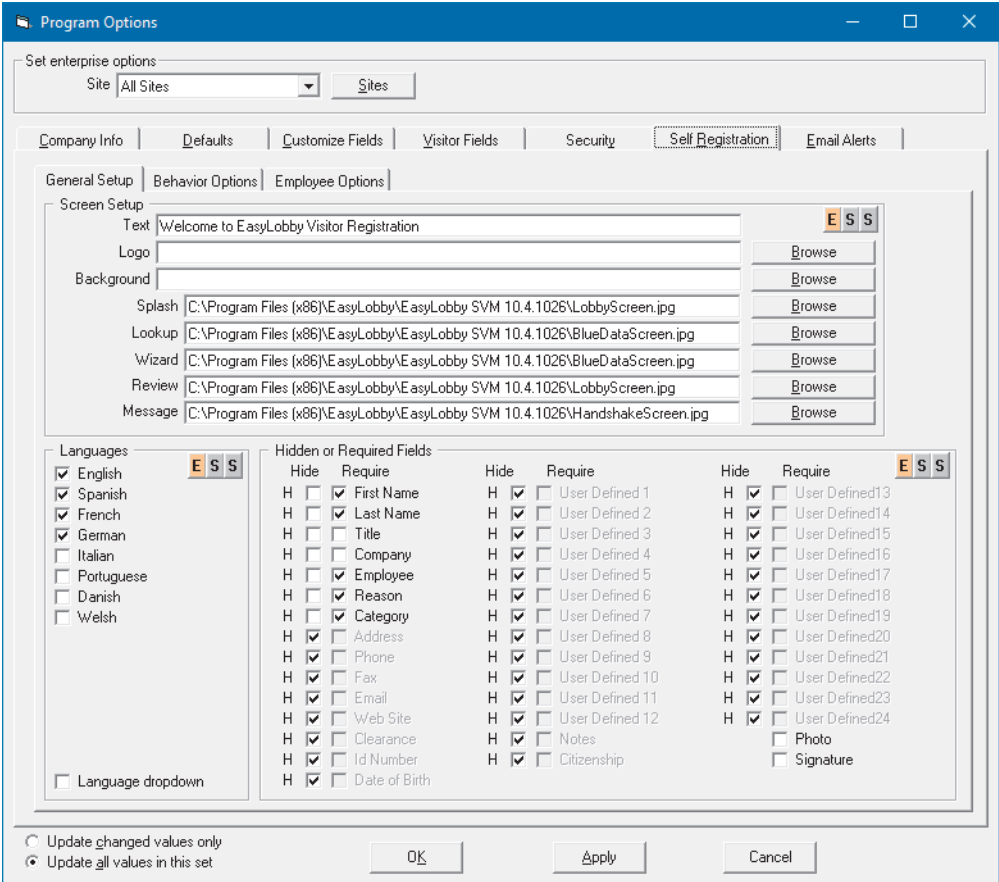
3.4.6.1 General Setup tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.


- Screen Setup

    The **Text**, **Logo**, and **Background** specified in the **Screen Setup** area are shown on the self-registration mode startup screen. You can add line breaks in the text by typing Shift+\ to enter a vertical bar character | (also known as a pipe). The startup screen can display up to three lines of text, so you can include at most two vertical bars in the text. The picture is shown at the top of the startup screen and may be stored in JPG, BMP, PCX, WMF, or EMF format.

- Languages

    The languages you select are offered as options to visitors on the startup screen. Visitors can press function keys to select the language they want to use.

- Hidden or Required Fields

    Field labels for the Required Fields you select are shown in bold on the self-registration screen. If a visitor does not complete a required field, a message identifies the missing field. Visitors cannot finish registering until they provide the required information. You may choose to hide any field on the form.

For further details, see *Section 4.2: Self-registration mode*.

3.4.6.2 Behavior Options tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.
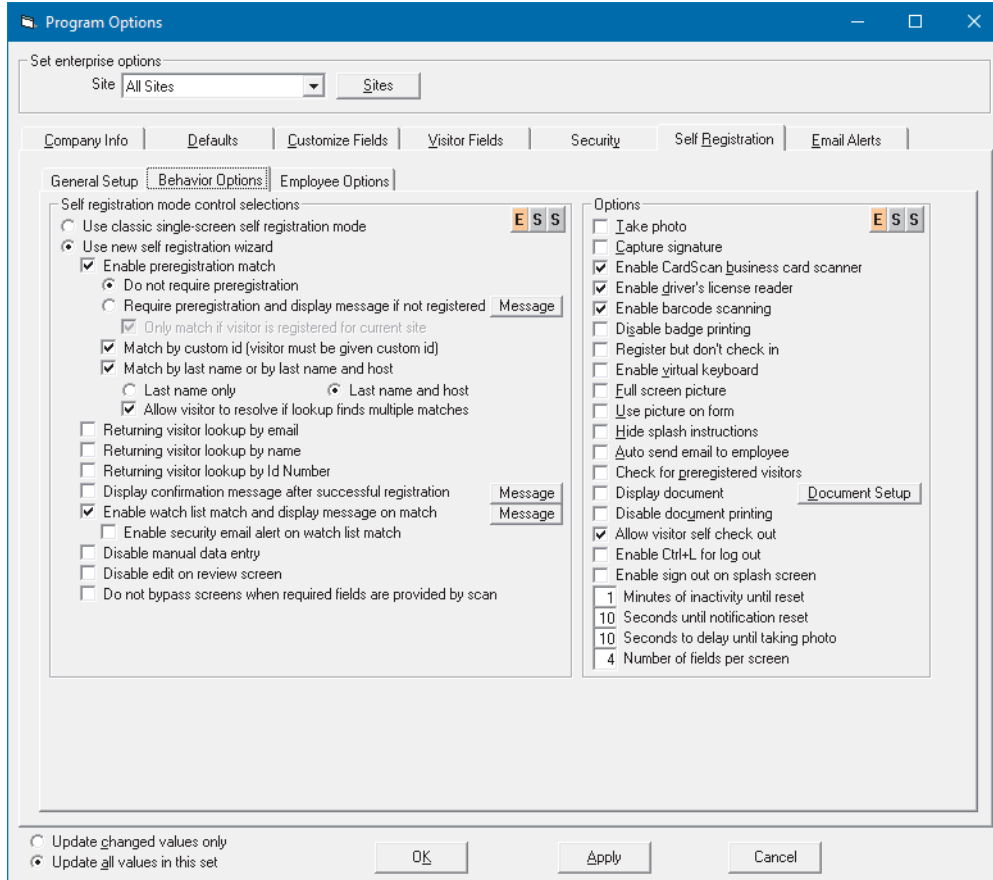
- Self registration mode control selectors

Self-registration runs in either a 'classic' single-screen mode, or self-registration wizard mode. When using the wizard, you have the choice of requiring preregistration, how to match, and whether or not to display a message if the visitor is required to be preregistered but is not. You also have the choice to look up a returning visitor, to display a confirmation record, enable the watch list and email notification, and display a message. Various customized messages can be displayed to the visitor. For example, click **Message** to the right of the **Display confirmation message after successful registration** option:
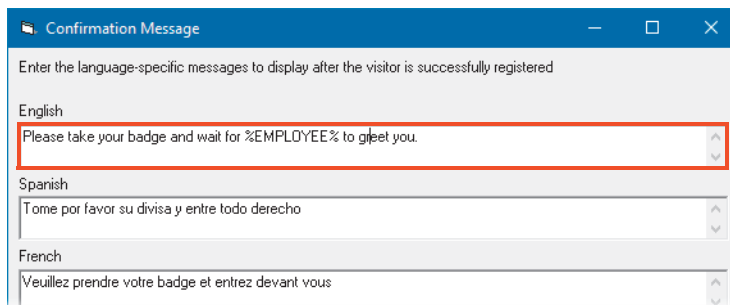
You can add variables to the message. The following variables are supported:

- %EMPLOYEE% - Employee name
- %EMPPHONE% - Employee phone
- %EMPEXTENSION% - Employee extension
- %EMPBUILDING% - Employee building
- %EMPFLOOR% - Employee floor
- %EMPOFFICE% - Employee office

Other fields from the visitor record are also supported: %REASON%, %SHOWNNAME%, %FIRSTNAME%, %LASTNAME%, % CATEGORY%, %LOCATION%, etc.

- Options

  Take a photo activates the camera to take a photo of the visitor. This can be an embedded camera or a camera device that is connected to the check-in station.

  Capture signature activates the Topaz signature capture device.

  Enable CardScan business card scanner activates the business card scanner.

  Enable driver's license reader activates the driver's license reader.

  Enable barcode scanning activates the barcode scanner and allows the visitor to scan the barcode on their preregistration confirmation email (or badge for a return visit).

  Disable badge printing prevents a badge being printed when the visitor registers. Typically, this is selected when you want your visitor to proceed to a lobby desk to have their badge printed by an operator.

  Register but don't check in registers the visitor's arrival but does not trigger the check in process. This can be useful if you have a security process which the visitor must complete before being checked in, or when you want your visitor to proceed to a lobby desk to have the final check in process completed by an operator.

  Enable virtual keyboard displays an on-screen keyboard for use with touchscreens. The touchscreen resolution must be at least 1024x768 to accommodate the entire keyboard.

  Use picture on form displays the visitor's existing photo if one is available.

  Auto send email to employee sends an email to the hosting employee to inform them that the visitor has registered.

  Check for preregistered visitors checks for preregistered visitors when using 'classic' single-screen mode.

Display document causes a document to appear as part of the registration process, for example a non-disclosure agreement:

1. Click **Document Setup**.
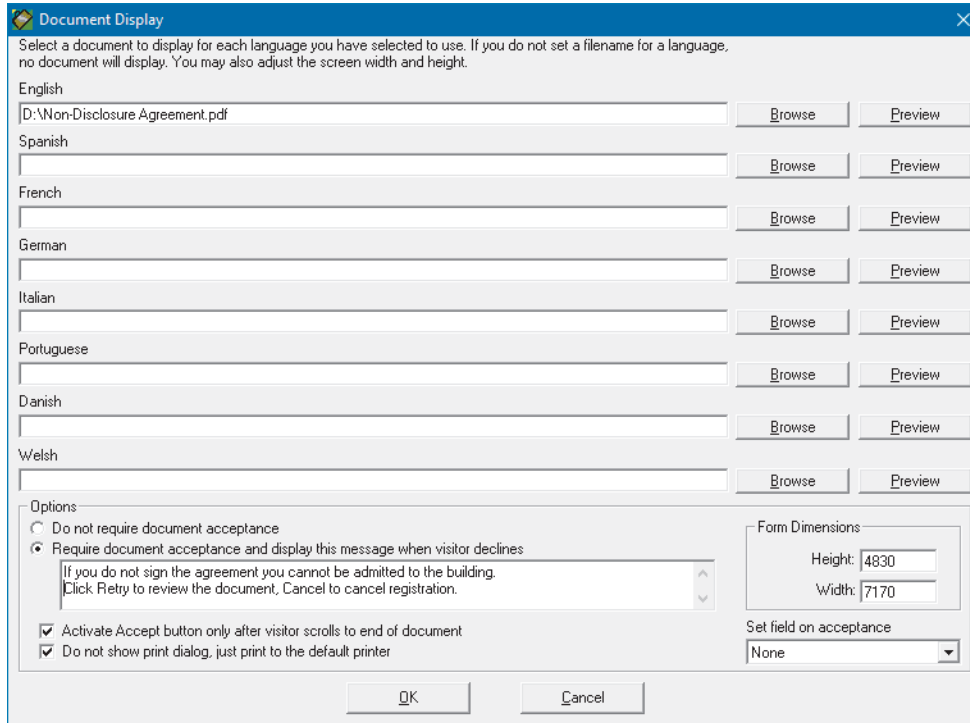
2. Click **Browse** to select the document to be displayed. The file may be simple text (.txt), Rich Text Format (.rtf), Adobe PDF (.pdf) or HTML (.html). If no document is configured for a particular language, the document window will not appear if the visitor has chosen that language for the self-registration process.

> **Do not require document acceptance** means the document will be displayed, but the visitor is not required to accept the document to allow registration to proceed.

> **Require document acceptance and**... means the visitor must click an **Accept** button to allow registration to proceed.

> **Activate Accept button only after**... requires the visitor to scroll to the end of the document before the **Accept** button becomes enabled.

> **Do not show print dialog, just print**... prevents the normal printer selection dialog being displayed to the visitor.

> **Form Dimensions** sets the dimensions of the document display form.
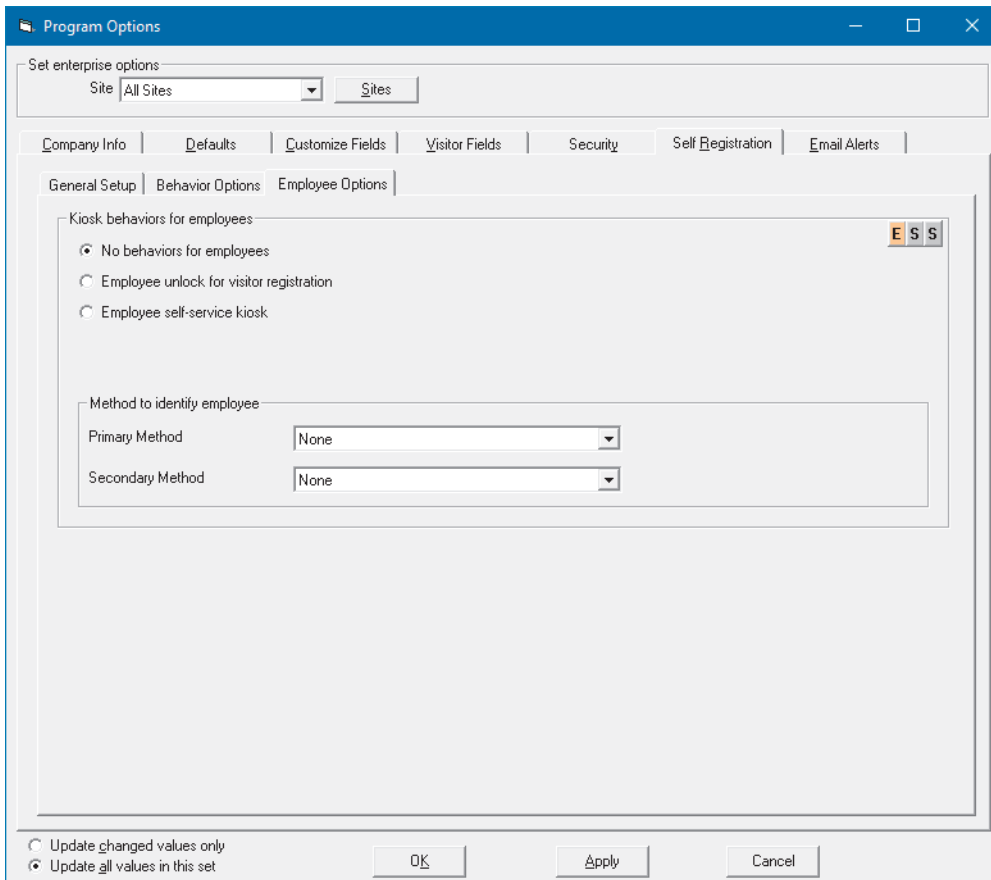
> **Set field on acceptance** allows you to select a user-defined field that will be set to indicate that the visitor has read the document. See *Section 3.4.3.1: Visitor User Defined tab* for details about configuring a user-defined check box field. This is commonly used with a Time/Value-Based Alert (see *Section 3.11.4: Time/Value-Based tab*) which allows the visitor to acknowledge a document for a set period.

Note: If an error message is displayed when using the **Document Display** window, install the latest version of Adobe Reader. Go to https://get.adobe.com/reader, and take care to clear all of the additional software download options before clicking **Install now**.

3.4.6.3 Employee Options tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.

A self-registration station can be set to operate in different modes when used by employees. Please note that if you plan to use a kiosk or workstation to enable employee badge printing, the workstation may not be used for traditional visitor check-in.

- Kiosk behaviors for employees

    No behaviors for employees means the self-registration station is used for visitors only.

    Employee unlock for visitor registration means an employee must enter their credentials to unlock the self-registration station. After that the visitor can register themselves or the employee can assist them.

    Employee self-service kiosk mode allows an employee to print a new employee badge for themselves. After entering their credentials, the information on their employee record is used to print a new badge. This is normally used if an employee has lost or forgotten their badge.

- Method to identify employee

    Primary method / **Secondary method** selects either one or two types of information that the employee must supply to enable the selected mode.

3.4.7   Email Alerts tab

You can setup EasyLobby to send email alerts for various events. Please note that in order for email alerts to function, you must have an SMTP server setup. See *Section 3.4.7.7: Email Interface tab*.

3.4.7.1 Visitor Check In tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.
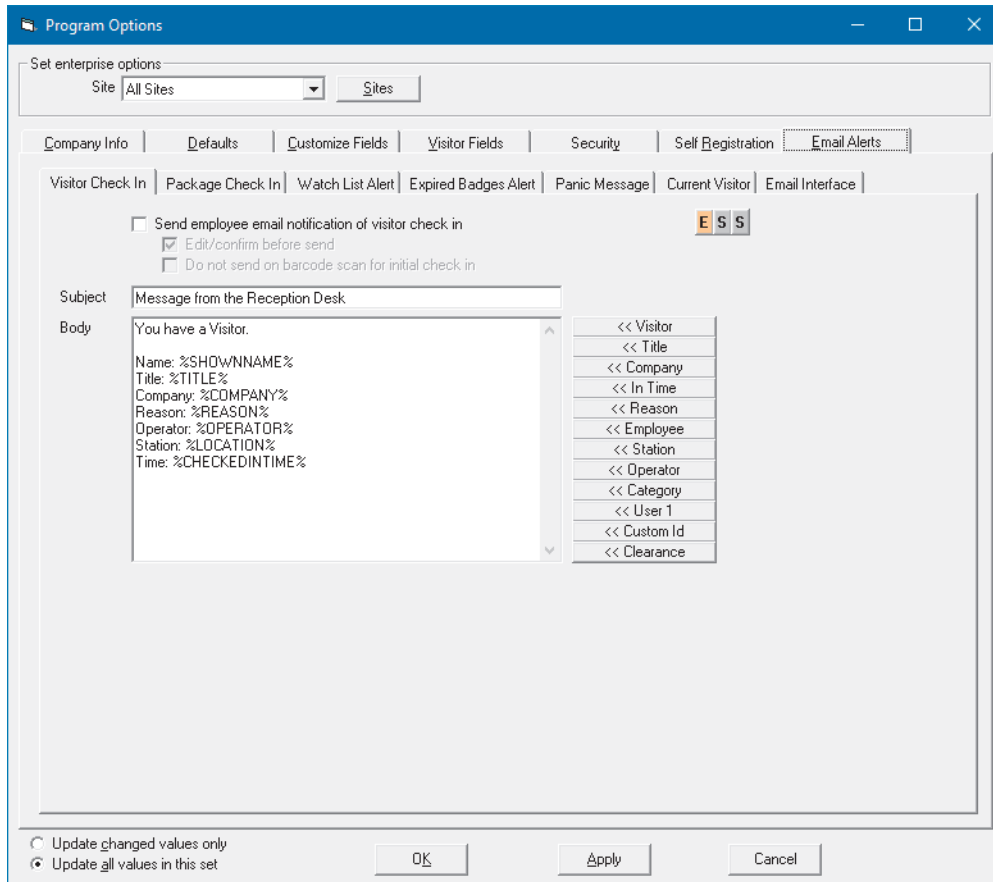
- The customization options include:

  Send employee email notification of visitor check in automatically sends an email notification to an employee with a valid email address when you check in a visitor and/or print a badge.

  Edit/confirm before send allows you to edit each email before it is sent to the employee.

  Subject: (Optional) Type your own subject heading for the email.

  Body: (Optional) Type in the editing box to format the email. To add a field to the email, click one of the **<< Field** buttons on the right. The field is displayed in the email message.

3.4.7.2 Package Check In tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.
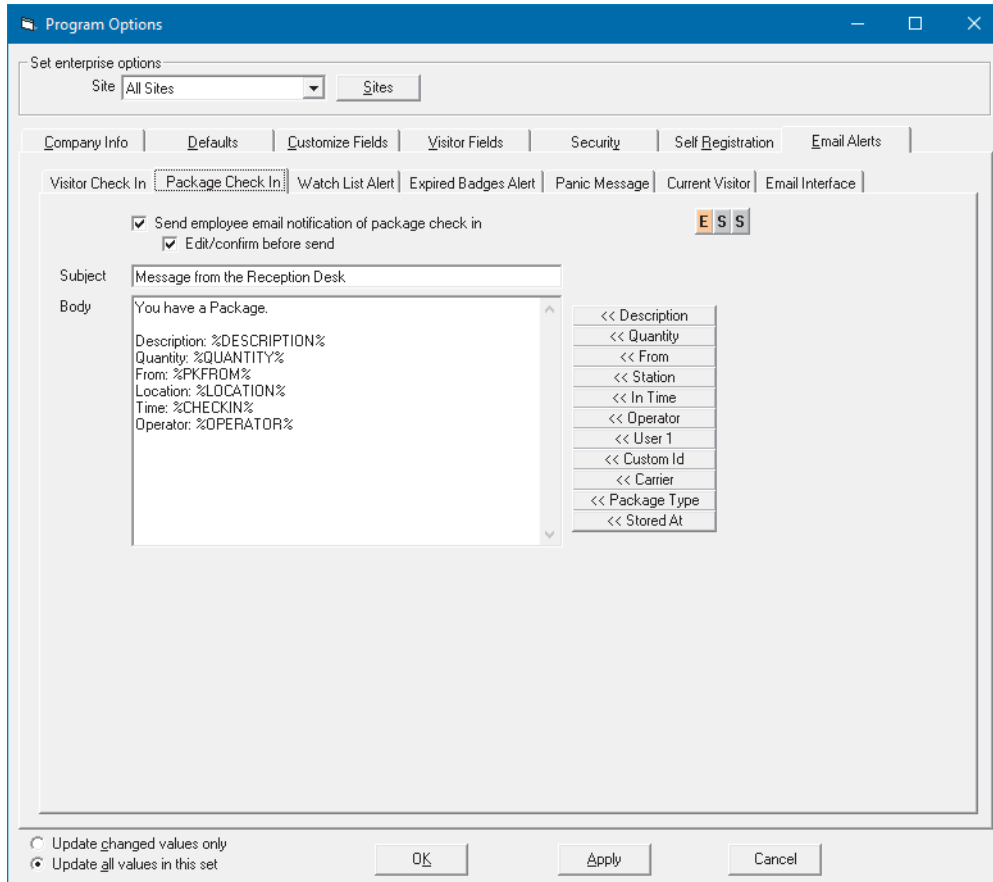
- The customization options include:

    Send employee email notification of package check in automatically sends an email notification to an employee with a valid email address when a package label is printed and/or checked in.

    Edit/confirm before send allows you to edit each email before it is sent to the employee.

    Subject: (Optional) Type your own subject heading for the email.

    Body: (Optional) Type in the editing box to format the email. To add a field to the email, click one of the **<< Field** buttons on the right. The field is displayed in the email message.

3.4.7.3 Watch List Alert tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.
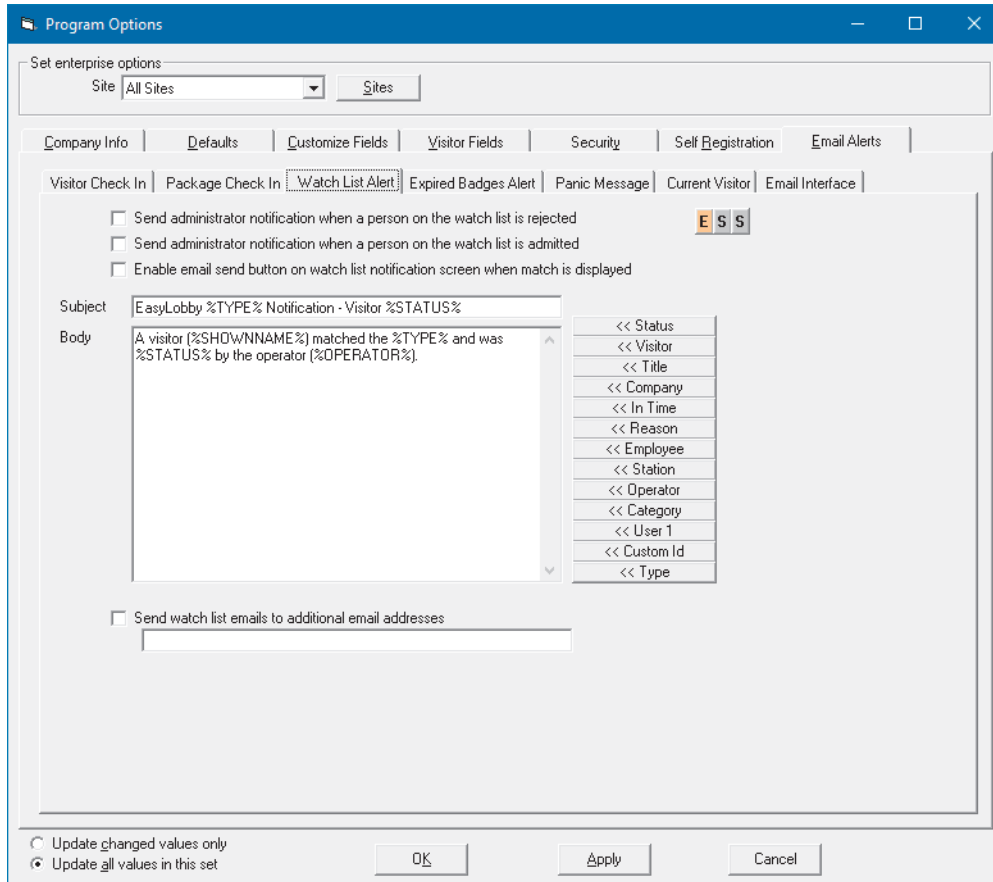
■ The customization options include:

Send administrator notification when a person on the watch list is rejected automatically sends an email to the administrator on file(**Edit** > **Sites** > **Administrator Email**) when a watch list visitor is denied entry.

Send administrator notification when a person on the watch list is admitted automatically sends an email to the administrator on file when a watch list visitor is allowed entry.

Enable email send button on watch list notification screen when match is displayed enables the **Send Email** button on the watch list notification screen, allowing you to send an email to the administrator, if desired, by clicking the button.
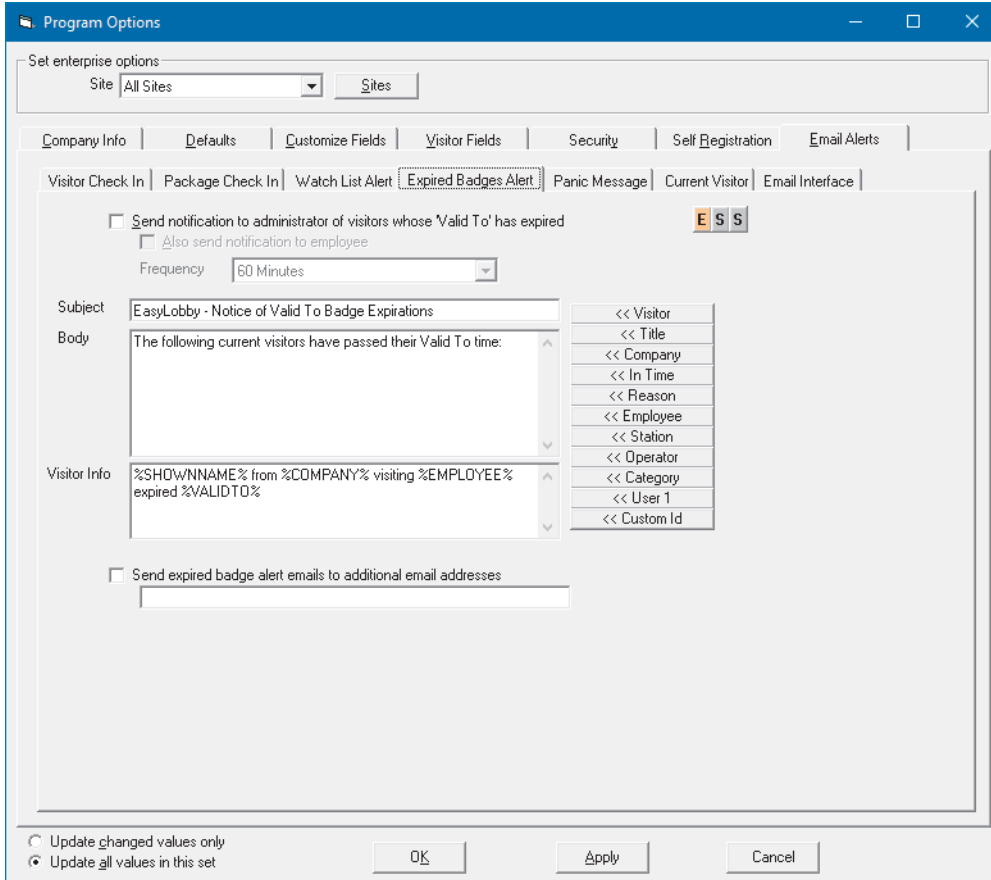
Subject: (Optional) Type your own subject heading for the email.

Body: (Optional) Type in the editing box to format the email. To add a field to the email, click one of the **<< Field** buttons on the right. The field is displayed in the email message.

Send watch list emails to additional email addresse sends an email notification to the address specified in the box. Multiple email addresses must be separated by commas.

3.4.7.4 Expired Badges Alert tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.

■ The customization options include:

Send notification to administrator of visitors whose 'Valid To' has expired: Sends an email to the administrator (**Edit** > **Sites** > **Administrator Email**) when a visitor has not been checked out after their 'Valid To' time has expired.

Also send notification to employee sends an email notification to the host employee when their visitor has not been checked out after their 'Valid To' has expired.

Frequency sets how often the program should check the expired badges and send email.

Subject: (Optional) Type your own subject heading for the email.

Body: (Optional) Type in the editing box to format preliminary text. To add a field to the email, click one of the **<< Field** buttons on the right. The field is displayed in the email message.

Visitor Info: Type in the editing box to format the visitor listing. To add a field to the email, click one of the **<< Field** buttons on the right. The field is displayed in the email message.

Send expired badge alert emails to additional email addresses sends an email notification to the address specified in the box. Multiple email addresses must be separated by commas.

3.4.7.5 Panic Message tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.

The Panic Message button allows operators to send a message to the EasyLobby Administrator on file and other recipients with a single click. You may choose to use this message to send a notification that there is an emergency situation in the lobby that requires security, or simply that there is a queue and additional support staff are needed.
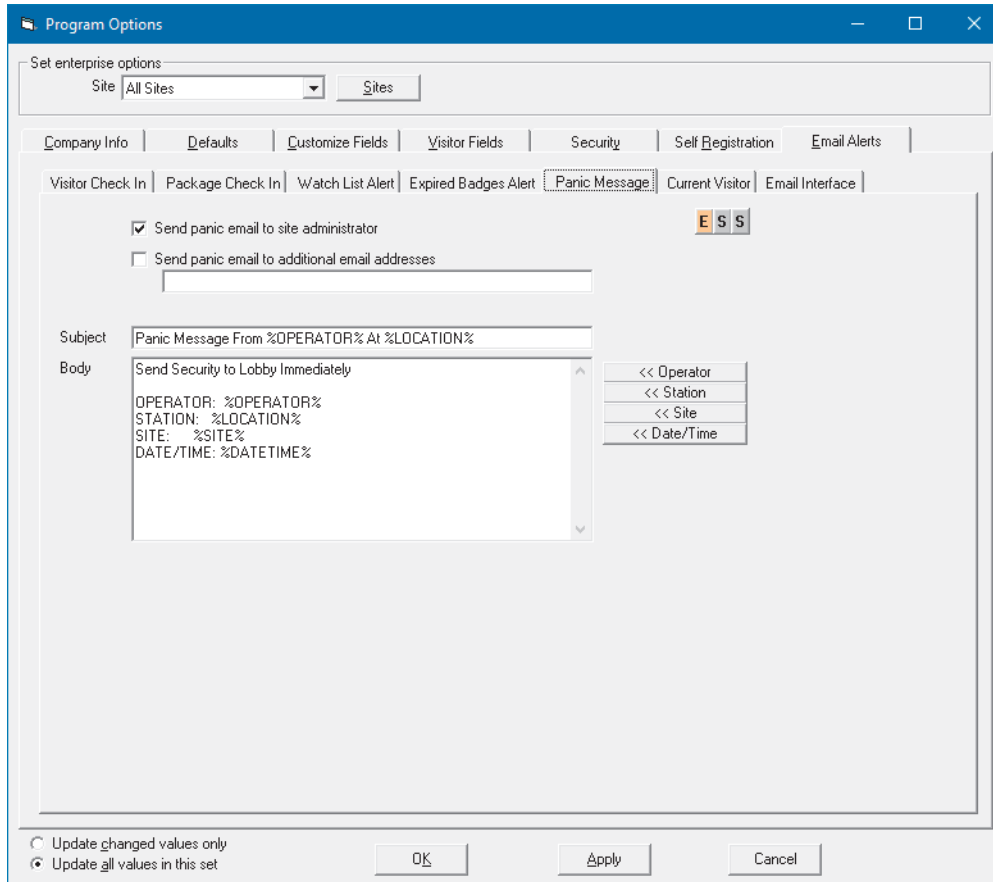
- The customization options include:

  Send panic email to site administrator sends an email to the administrator (**Edit** > **Sites** > **Administrator Email**) when the ✉ panic message button or **File** > **Panic Message** menu item is used.

  Send panic email to additional email addresses sends an email notification to the address specified in the box. Multiple email addresses must be separated by commas.

3.4.7.6 Current Visitor tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.

The Current Visitor report displays all visitors that are currently checked in. You can run this report directly from the **File** menu or the toolbar. The report can be printed, or sent via email if configured through the email alerts. This can be a helpful tool to use during evacuation drills or in the case of an actual emergency, where you might need to account for all of the visitors that are checked in to your facility.
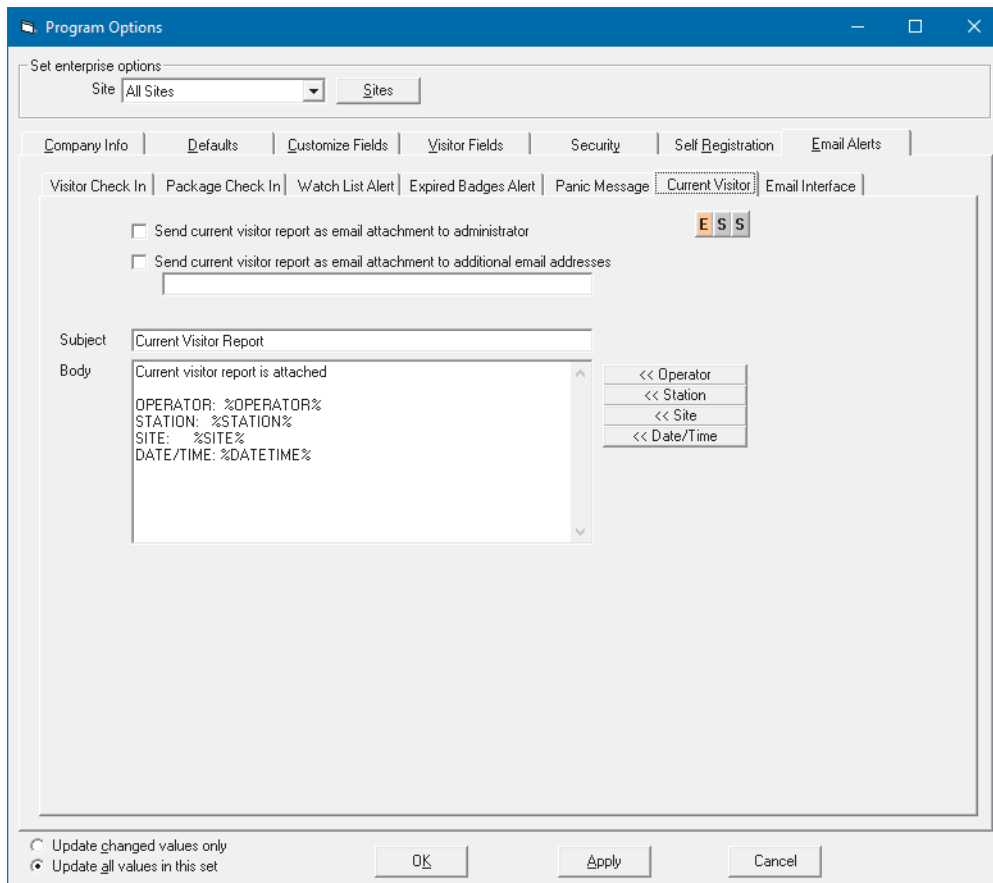
- The customization options include:

    Send current visitor report as email attachment to administrator sends an email to the administrator (**Edit** > **Sites** > **Administrator Email**) when the **Current Visitor** button or menu item is selected.

    Send current visitor report as email attachment to additional email addresses sends an email notification to the address specified in the box. Multiple email addresses must be separated by commas.

3.4.7.7 Email Interface tab

Note: Before making any changes, see *Section 3.4: Program options*, which provides important details about the operation of the **Program Options** tabs. It is important to make sure you are setting the options for the correct site and station.
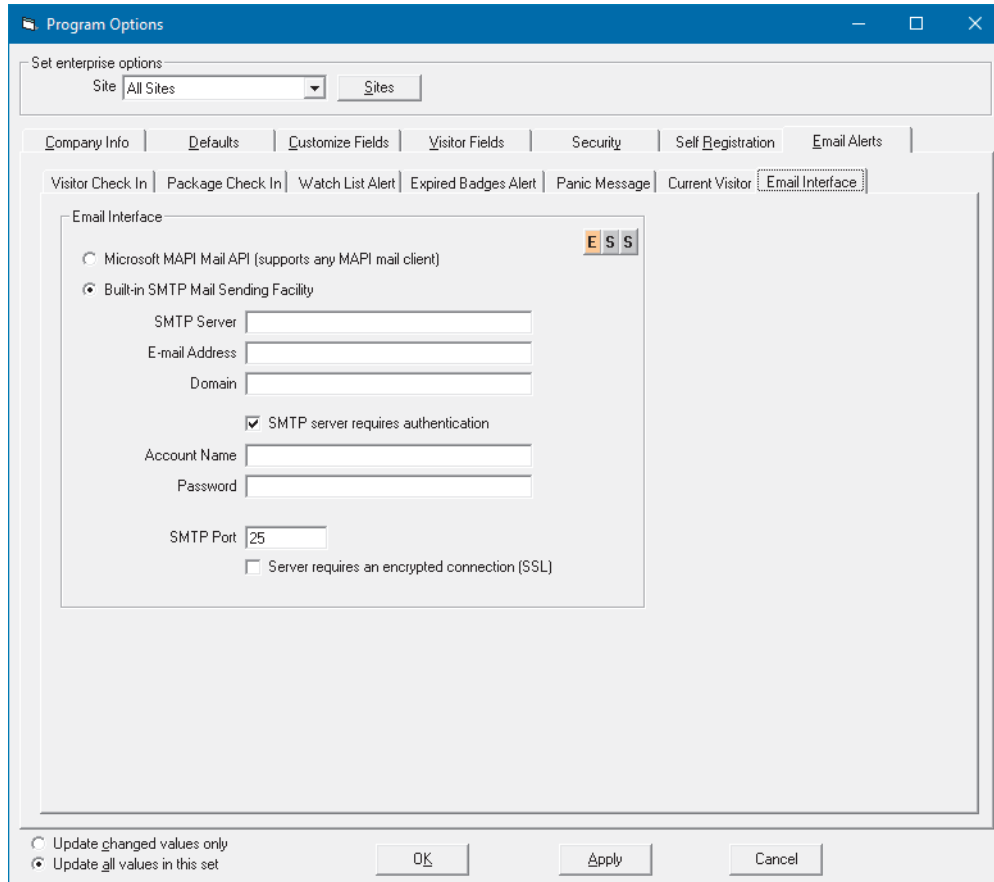
- Email Interface:

    Microsoft MAPI Mail API uses your installed email MAPI client (i.e. Outlook).

    Built-in SMTP Mail Sending Facility: You must be connected to a SMTP mail server. If the connection fails when trying to send an email, you will have lost the email message.

3.5   Badge options

See *Section 11: Print badges* for full details about badge options.

3.6   Device options
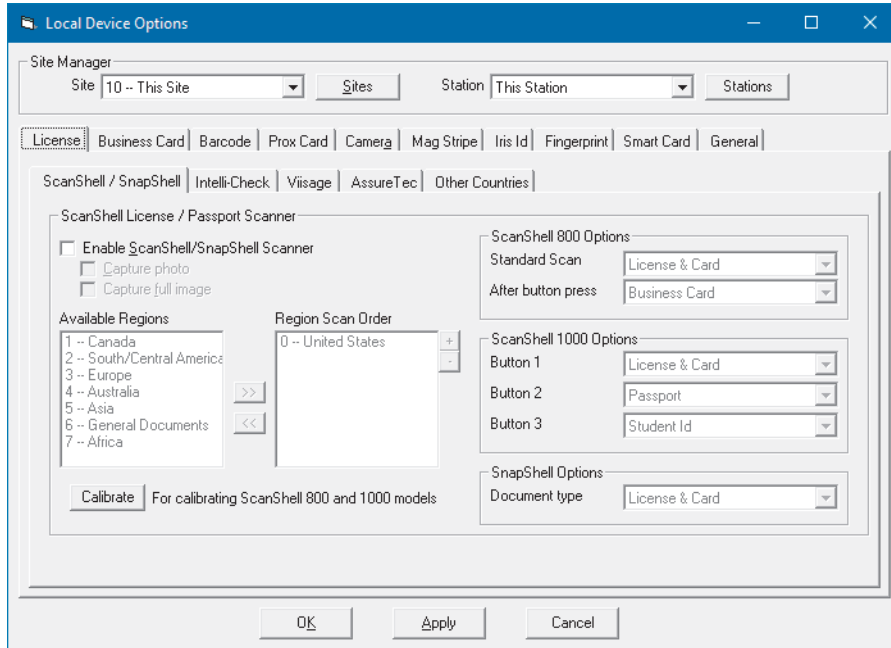
EasyLobby supports a wide range of scanners/readers; see *Section 2.2: Hardware installation*.

- Click **Edit** > **Device Options**.
- The information can be set at the enterprise or site/station level depending on whether you are logged in as an enterprise administrator or site administrator. Select the **Site** and **Station**.
- The ability to change the settings is also dependent on whether the enterprise administrator has selected that an option may be changed at a site or station level or only at the enterprise level.

3.6.1 License tab

The **License** tab allows you to configure license and passport scanners.

3.6.1.1 ScanShell/Snapshell tab

Note: Before making any changes, check that the correct site and station are selected.
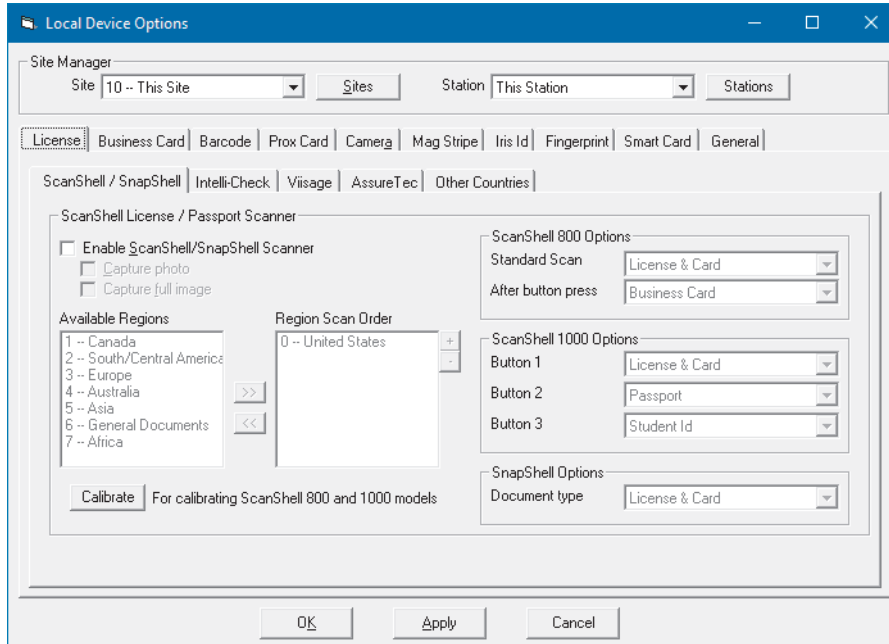
- ScanShell/Snapshell License / Passport Scanner

  Enable ScanShell/SnapShell Scanner enables the device.

  Capture photo uses the photo on the license as the visitor's photo.

  Capture full image captures the image of the complete license. This thumbnail of the ID will appear as the second photo in the **Visitor** form **Photo** tab.

  Available Regions / **Region Scan Order**: To enable a license region, select the region from the **Available Regions** list and click ⏩ to move the region to the **Region Scan Order** list. To remove a region from the **Region Scan Order** list, select the region and click ⏪ to move the region to the **Available Regions** list. The scan order allows you to optimize the order in which templates are queried when completing a scan, making the process faster for the most popular regions.

  Calibrate: The scanner must be calibrated before it will work. Click **Calibrate**, insert the scanner's supplied calibration card and click **OK**.

  Set the options for which form of identification is to be scanned:

  ScanShell 800 Options: Set the identification for the initial scan, and for the scan after a button press.

  ScanShell 1000 Options: Set the identification scan for each button.

  The logged in Windows user must have write permission for the system temporary folder if you are using a ScanShell 800 or 1000 scanner with photo extraction. The folder is usually C:\Windows\Temp. To check the location of your system temporary folder, open Control Panel and click **System** > **Advanced system settings** > **Environment Variables**. In the **System variables** section, check the value of the TMP and TEMP variables. The term %USERPROFILE% indicates your user profile folder, typically C:\Users\<username>. If you are using the ScanShell 1000-A, permission is also required for the C:\Windows\twain_32 and C:\Syscan folders. See *Section A.1: User level access to commands* for more information on permissions.

3.6.1.2 Intelli-Check tab

Note: Before making any changes, check that the correct site and station are selected.
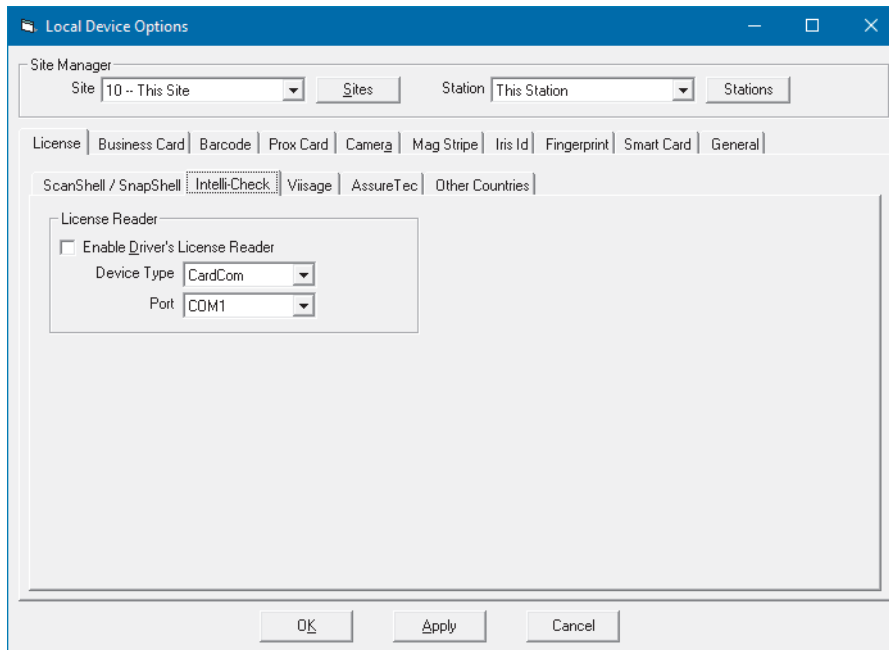
- ■ License Reader

    Enable Driver's License Reader enables the device.

    Port is usually COM1, but check with your system administrator if unsure about the port.

    Device type selects the type of Intellicheck Reader; DCM or IM2000.

    Note: If you are using an Intellicheck DCM with a USB cable, you will need to find the COM port to which the device has been assigned. See *Section 2.2.2: Install an Intellicheck DCM/IM2000/IM1200+*.

3.6.1.3 Viisage tab

Note: Before making any changes, check that the correct site and station are selected.
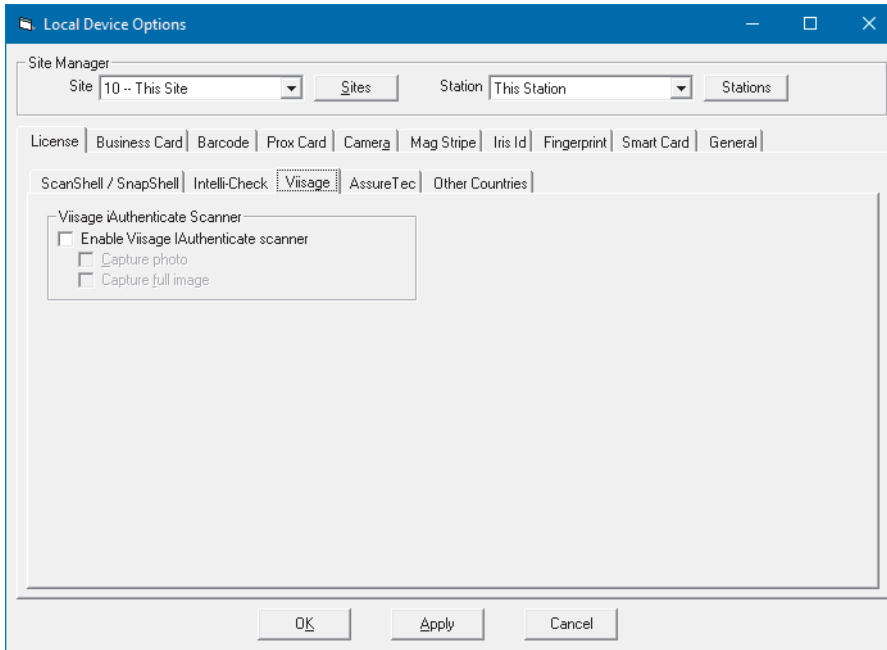
- Viisage Authenticate Scanner

    Enable Viisage Authenticate scanner enables the device.

    Capture photo uses the photo on the license as the visitor's photo.
    Capture full image captures an image of the complete license.

3.6.1.4 AssureTec tab

Note: Before making any changes, check that the correct site and station are selected.
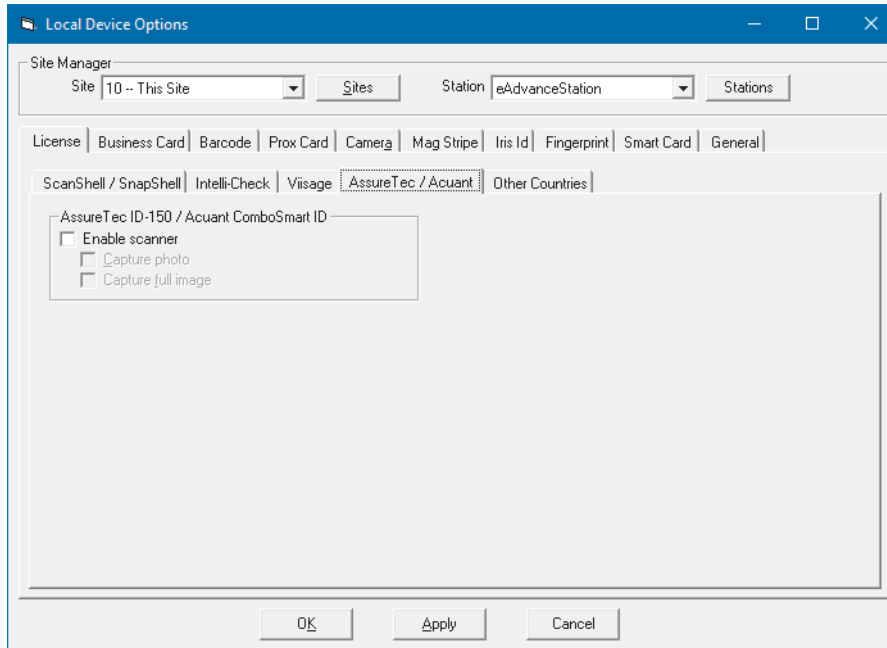
■ AssureTec ID-150 Scanner

Enable Scanner enables the device.

Capture photo uses the photo on the license as the visitor's photo.

Capture full image captures an image of the complete license.

3.6.1.5 Other Countries tab

Note: Before making any changes, check that the correct site and station are selected.
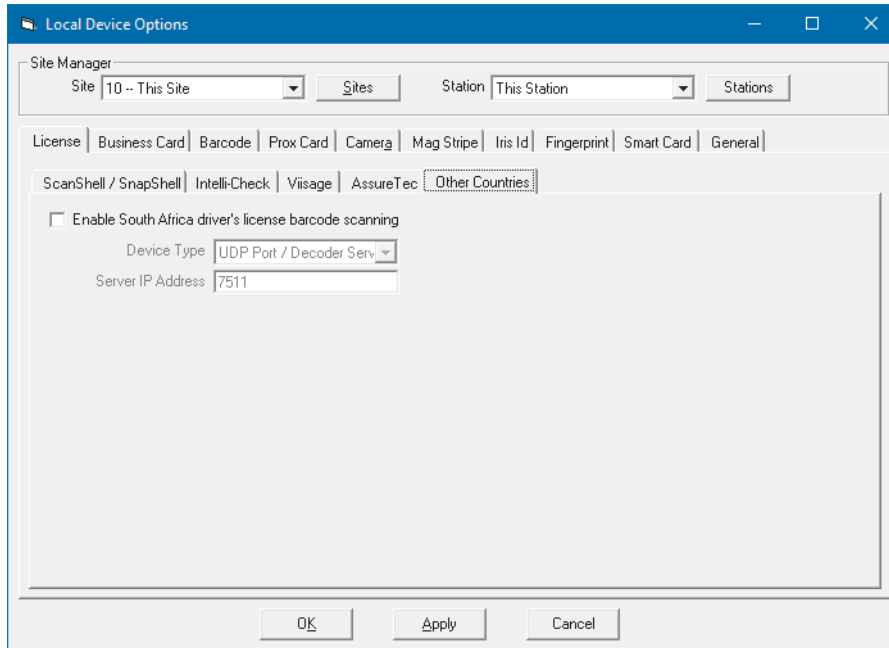
Enable South Africa driver's license barcode scanning enables scanning of South Africa driver's licenses.

Device type: Selects the device type.

Server IP Address: Selects the server IP address.

3.6.2   Business Card tab

Note: Before making any changes, check that the correct site and station are selected.

The **Business Card** tab allows you to configure business card scanners. Please note that due to the infinite number of business card designs and layouts, standardizing the input of data from a business card to a specific data field with EasyLobby cannot be guaranteed.
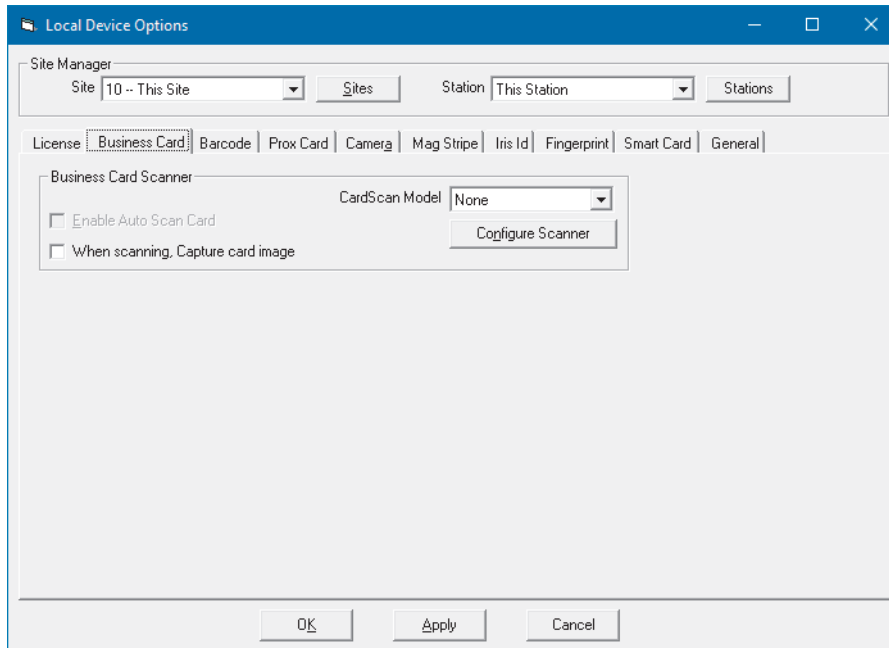
- Business Card Scanner

    CardScan Model selects the required CardScan model.

    Enable Auto Scan Card causes the scanner to automatically scan the business card and create a visitor record. This option should only be selected when you are using a business card scanner. Leaving it selected when there is no scanner attached will affect the performance of EasyLobby.

    When Scanning, Capture card image places the image of the scanned business card as the picture for the visitor.

    Configure Scanner: The business card scanner must be configured before it will scan business cards.

    a. Click **Configure Scanner** to display the **Scanner Setup** window.

    b. Set the correct scanner port, either USB or LPT1 depending on your scanner connection.

    c. The scanner must be calibrated before it will scan a business card. Place a calibration card (one is included with your scanner) or a business card, plain white side down into the scanner and click **Calibrate**.

    d. Click **OK**.
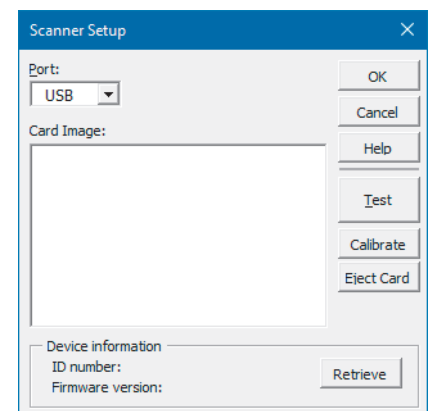
3.6.3   Barcode tab

Note: Before making any changes, check that the correct site and station are selected.

Barcode scanners should be configured using the scanner's installation instructions provided by the hardware manufacturer.
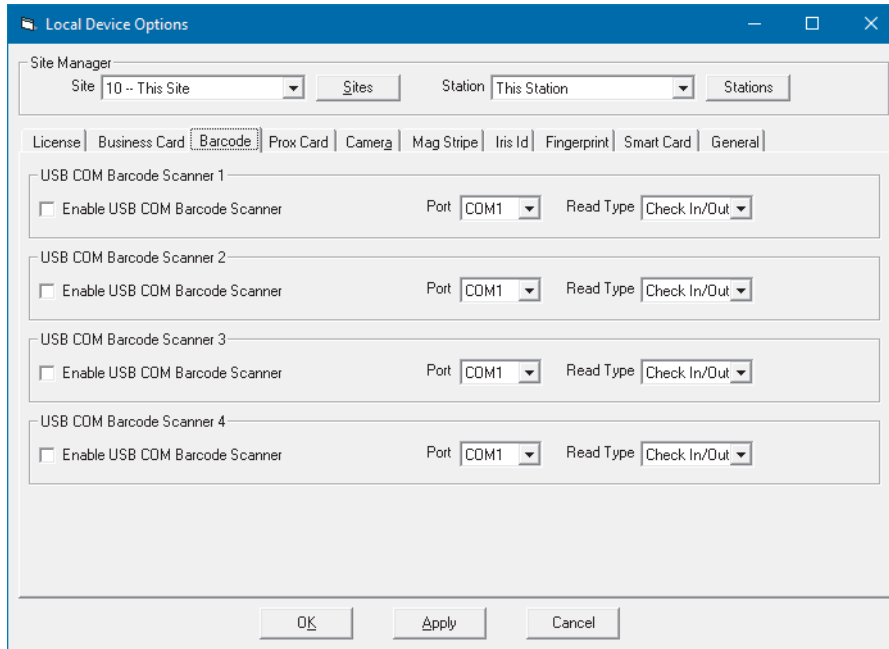
Three types of barcode scanner are compatible with EasyLobby:

- Unitech 335 keyboard wedge scanner.
- Honeywell Voyager 9520scanner.
- Honeywell Xenon Wireless Area-Imaging Scanner.

To configure the scanner, scan the necessary barcodes in the scanner's user manual to set a preamble string of F12 and Code 128. It should then work automatically with EasyLobby. You can configure four USB COM Barcode Scanners.

- USB COM Barcode Scanner 1 / 2 / 3/ 4
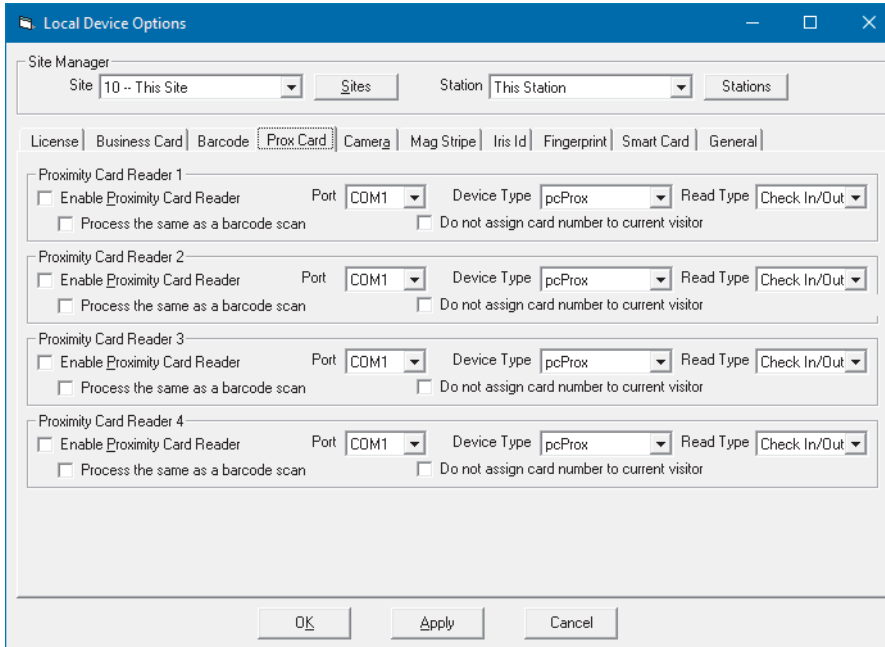
  Enable USB COM Barcode Scanner enables the device.
  Port selects the COM port to which the barcode scanner is connected.
  Read Type sets which actions a barcode scanner can perform.

3.6.4   Prox Card tab

Note: Before making any changes, check that the correct site and station are selected.

You can configure four USB Proximity Card Readers with EasyLobby.

- Proximity Card Reader 1 / 2 / 3 / 4

    Enable Proximity Card Reader enables the device.

    Port selects the COM port to which the proximity card reader is connected.

    Device Type selects the type of proximity card reader.

    Read Type sets which actions a proximity card scanner can perform.

    Process the same as a barcode scan suppresses the usual pop-window for a proximity card scan, and instead uses the same options used for a barcode scan (see *Section 3.4.5.2: Barcode Scan tab*). This helps to streamline the process when using prox cards.

    Do not assign card number to current visitor prevents the proximity card number being immediately assigned to the currently open visitor record. If another visitor's record is currently open in EasyLobby, this option prevents an unexpected receipt of proximity card details being assigned to the wrong visitor record, or disturbing your operation of EasyLobby.

3.6.5   Camera tab

Note: Before making any changes, check that the correct site and station are selected.
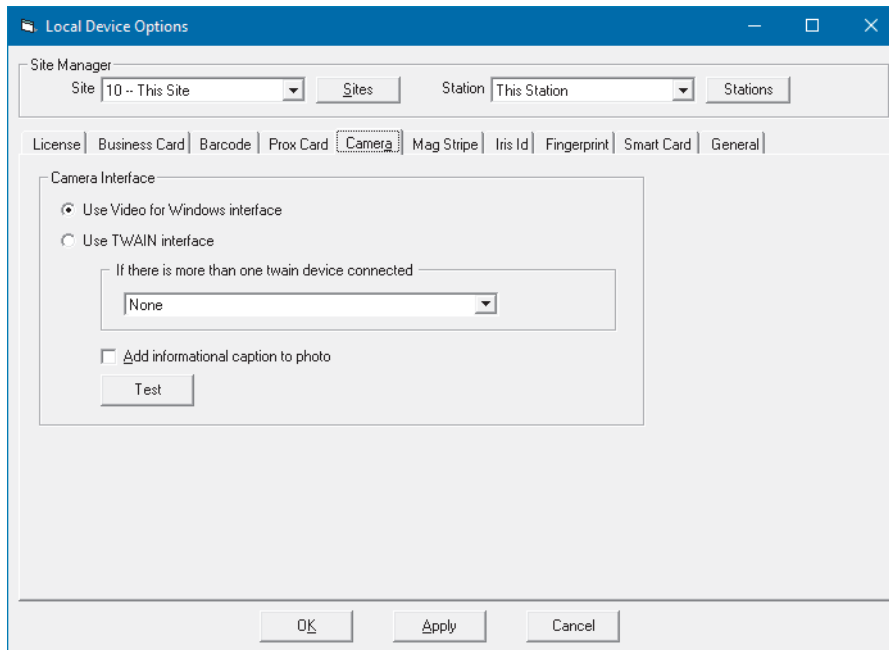
- Camera interface:

  Use Video for Windows interface: Select this option if you are using a camera that uses the Video for Windows interface drivers.

  Use TWAIN interface: Select this option if you are using a TWAIN device, e.g. camera, flatbed scanner.

  If there is more than one twain device connected: If you have a camera and a flatbed scanner connected to your computer, choose which device you would like EasyLobby to use for taking photos.

  Add informational caption to photo adds time and date information to the photo taken.

  Test performs a test to check that the camera is working. If the displayed image is green, click **Edit** > **Format**, select a resolution of 640x480, and click **Apply**.
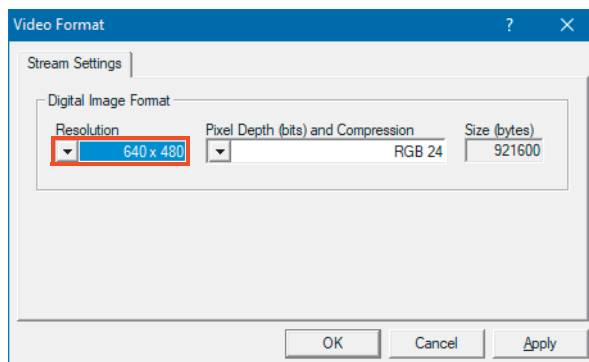
3.6.6   Mag Stripe tab

Note: Before making any changes, check that the correct site and station are selected.
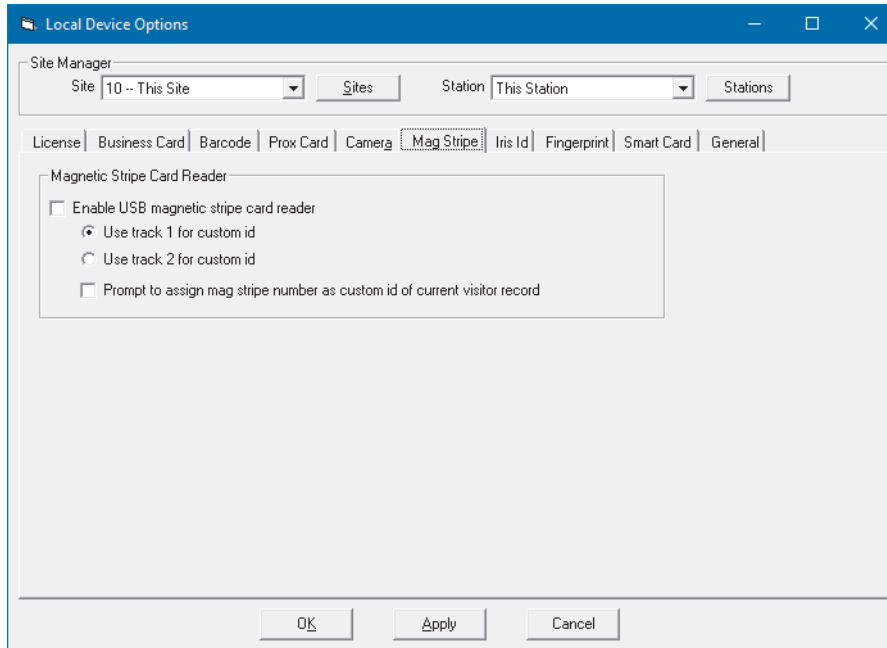
- Magnetic Stripe Card Reader

    Enable USB magnetic stripe card reader enables the device.

    Use track 1/2 for custom id selects which of the card tracks should be used to create the custom Id.

    Prompt to assign mag stripe number as custom id of current visitor record displays a prompt before assigning the magnetic stripe number to the current visitor record.

3.6.7   Iris Id tab

Note: Before making any changes, check that the correct site and station are selected.
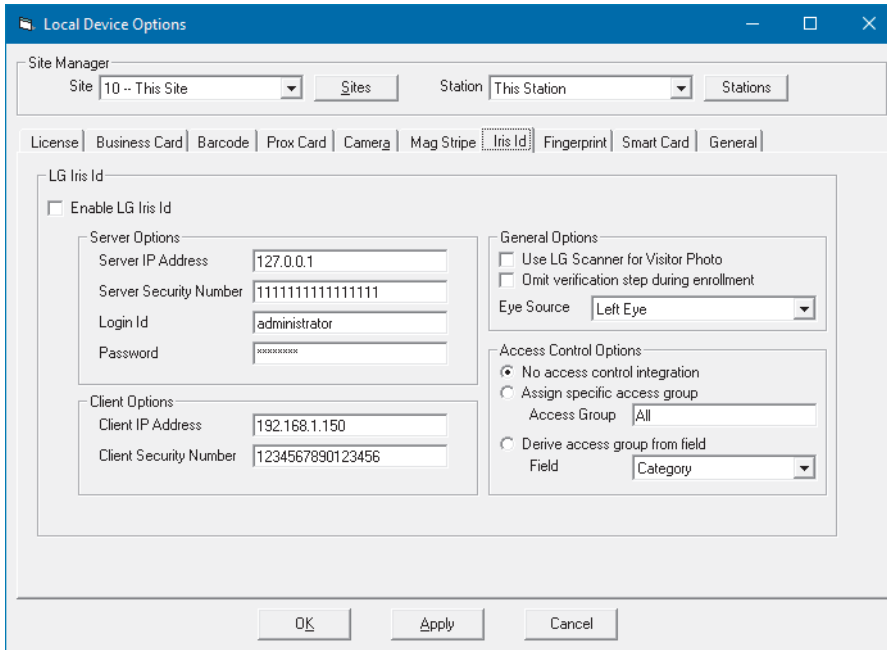
The LG Iris Id device is no longer supported.

3.6.8   Fingerprint tab

Note: Before making any changes, check that the correct site and station are selected.

Fingerprint scanners should be configured using the scanner's installation instructions provided by the hardware manufacturer.
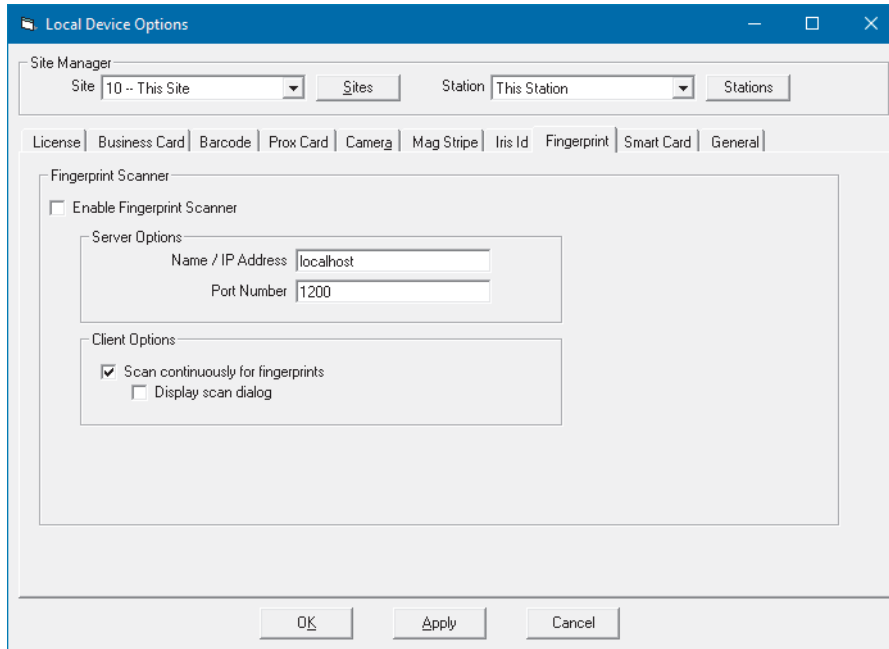
- Fingerprint Scanner

    Enable Fingerprint Scanner enables the device.

    - Server Options

        Name/ IP Address: Type the details of the server.

        Port number: Type the port number.

    - Client Options

        Scan continuously for fingerprints allows a person to use the fingerprint scanner at any time. If this option is not selected, you must manually enable the fingerprint scanner when required.

        Display scan dialog enables the scan dialog.

3.6.9 Smart Card tab

Note: Before making any changes, check that the correct site and station are selected.
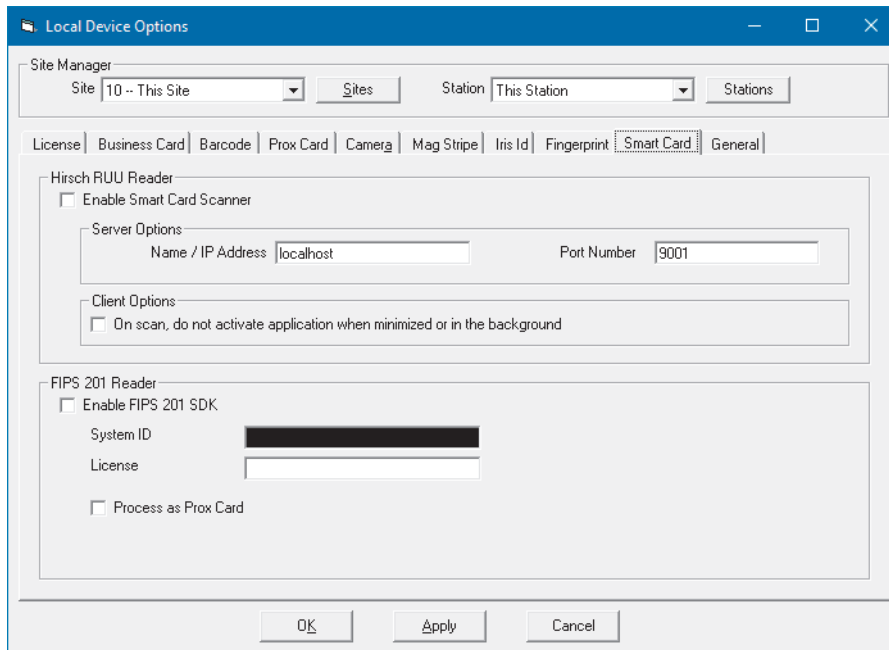
- Hirsch RUU Reader

    Enable Smart Card Scanner enables the device.

    - Server Options

        Name/ IP Address: Type the details of the server.

        Port number: Type the port number used for communication.

    - Client Options

        On scan, do not activate application when minimized or in the background causes EasyLobby to remain minimized when a scan is detected, rather than popping up. This is useful if you are performing other tasks on the computer.

- FIPS 201 Reader

    Enable FIPS 201 SDK enables the device.

    System ID displays the System ID when the FIPS SDK is detected.

    License displays the license number when the FIPS SDK is detected.

    Process as Prox Card processes the smart card in the same way as a normal proximity card, prompting for action. If not selected, the card details will simply be captured into the record.

3.6.10   General tab

Note: Before making any changes, check that the correct site and station are selected.
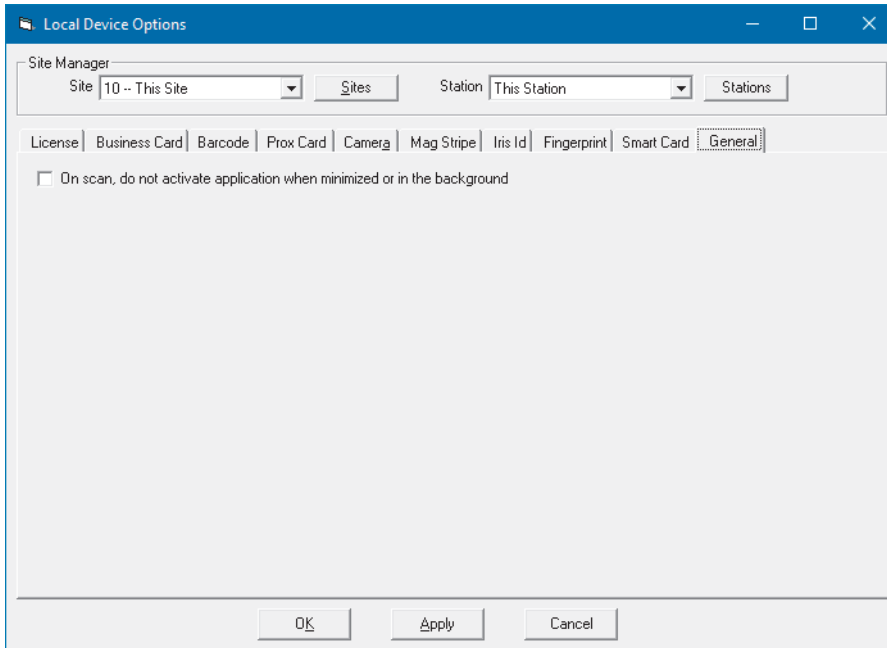
- **On scan, do not activate application when minimized or in the background** causes EasyLobby to remain minimized when a scan is detected, rather than popping up. This is useful if you are performing other tasks on the computer.

3.7   Import data

EasyLobby administrators can import employees, visitors, reasons, watch list entries, packages, and assets into the EasyLobby database from another database or spreadsheet.

3.7.1   How to import data

The record types that can be imported are Visitors, Employees, Assets, Asset Loans, Packages, Watch Lists, Lost and Found items, Reasons, Categories, Clearances, User Accounts, Sites, Stations, and Conference Rooms.

Note: Before importing data, it is advisable to export or backup existing data.

To import records from a database or spreadsheet:

1. Create a file from your database or spreadsheet to import to EasyLobby.

    The file you create must contain records with fields separated by asterisks, tabs, or commas. Each record must be on a separate, single line and have a column for each of the fields specified below (leave the column entry blank if you are not using that field, but you must have the field title in the file). You can omit any fields after the last field you want to import.
    For example, a visitor import file must contain the following fields in the first row, in the provided order.

1. RecordType	2. Id	3. FirstName	4. LastName	5. SSN	…
… 6. Title	7. Company	8. Address1	9. Address2	10. City	…
… 11. State	12. Zip	13. Country	14. Citizenship	15. WorkPhone	…
… 16. CellPhone	17. Fax	18. Email	19. Website	20. License	…
… 21. LicenseExpiration	22. DateOfBirth	23. Employee	24. Category	25. Reason	…
… 26. Clearance	27. Site Id	28. Conference Room	29. ParkingSpaceId	30. CheckIn	…
… 31. Check Out	32 ValidFrom	33. ValidTo	34. RegisteredBy	35. UserDefined1	…
… 36. UserDefined2	37. UserDefined3	38. UserDefined4	39. UserDefined5	40. UserDefined6	…
… 41. UserDefined7	42 UserDefined8	43. UserDefined9	44. UserDefined10	45. UserDefined11	…
… 46. UserDefined12	47. UserDefined13	48. UserDefined14	49. UserDefined15	50. UserDefined16	…
… 51. UserDefined17	52. UserDefined18	53. UserDefined19	54. UserDefined20	55. UserDefined21	…
… 56. UserDefined22	57. UserDefined23	58. UserDefined24	59. ApprovedBy	60. Status	…
… 61. ProxCardNo	62. Notes	63. PrintCount	64. ProxyPrint	65. InsuranceCo	…
… 66. PolicyNumber	67. CreationDate	68. ModifiedDate	69. CustomId		

    When EasyLobby reads the file, the first row is ignored as it is expected to contain the field names, so your database table or spreadsheet might look like this:

	A	B	C	D	E	F	G	H	I	J	K
1	RecordType	Id	FirstName	LastName	SSN	Title	Company	Address1	Address2	City	State
2	Visitor		John	Smith	123-45-6789	Mr	HID	6533 Flying Cloud Dr # 1000	Eden Prairie	Minneapolis	Minnesota
3	Visitor		Jane	Smith	987-65-4321	Mrs	HID	6533 Flying Cloud Dr # 1000	Eden Prairie	Minneapolis	Minnesota

    Note: To create an import file with the fields already set up in the correct order, click **File** > **Export**. You can then replace the information in the file with the information you wish to import into EasyLobby. Before overwriting data, it is advisable to backup your existing data.

2. Name the file with one of the following file extensions:

   Asterisk-separated file: .sep

   Tab-separated file: .tab

   Comma-separated file: .csv

   Dates should be in the following format: mm/dd/yy h:mm, for example: 10/31/17 9:22, 12/25/18 23:40, 03/09/18 9:05. Years follow the rules defined in the Regional Settings of your Windows Control Panel to determine the century. By default, years from 00 to 29 are interpreted as 2000 to 2029.

3. The Record Type field for all records in the file must be populated with the type of record you are importing, for example Visitor. The Id column is used only if you have previously exported the visitor and you want to ensure the same record gets updated upon re-importing. It can be left blank in most cases.

4. When your file is ready, open the visitor log within EasyLobby and move to a visitor view.

5. If your visitor log already contains records, create a backup of your visitor log (without deleting records) before you import records. To do this, click **File** > **Visitor Log** > **Backup** and clear the **Delete backed up visitors and packages** option before clicking **OK**.

6. Click **File** > **Import**.

7. Find and select the file you created.

8. If you need to open the file in read-only mode because the file is in use by another application, check **Open as read-only**.

9. Click **Open**. The records are imported from the file and you will see a message about how many records were imported.

10. Use the visitor log to view the imported records. Check to make sure the information was imported into the correct fields. If not, fix the order of the fields in your import file. Make sure fields do not contain the delimiter character (asterisk, tab, or comma) within the field text.

You can include multiple record types in a single import file. To do this, separate the two sets of data by a blank row. For example, if you wanted to import both visitors and employees, row one would contain the visitor field names and the following rows would contain visitor records, all with a RecordType of Visitor. After all of the visitor records, skip one row leaving it blank, then include all of the employee field names followed by the employee records, all with a RecordType of Employee. This can be done with as many record types as needed.

Some record types also include sub-records. A sub-record is a field from a record that could possibly contain multiple values. For example, when importing a visitor you can also import visitor entry data as sub-records. A single visitor can have many entry records. Therefore these are considered sub-records. Sub-records are handled the same as standard record types when configuring your import file.

For a complete list of record types, sub-records, and their field names, see *Section A.6: Record formats*.

3.7.2 Import employee data

The Employee Import utility is used by administrators to import employee data into an EasyLobby database. The utility allows flexibility in structuring the import file data as a delimited file.

Note: Before importing data, it is advisable to export or backup existing data.

To import employee records from another database or a spreadsheet:

1. Run EmployeeImport.exe from the Utilities\EmployeeImport folder on the EasyLobby DVD, or from the installation folder, normally
   C:\Program Files (x86)\EasyLobby\EasyLobby SVM 10.0\Utilities.

2. Select the employee data source. The choices are a Delimited text file, Active Directory, or an ODBC Data Source. If you are using the Delimited Text File option, you must first create a comma or tab delimited text file (.csv or .tab) of your employee information. Click **Next =>**.
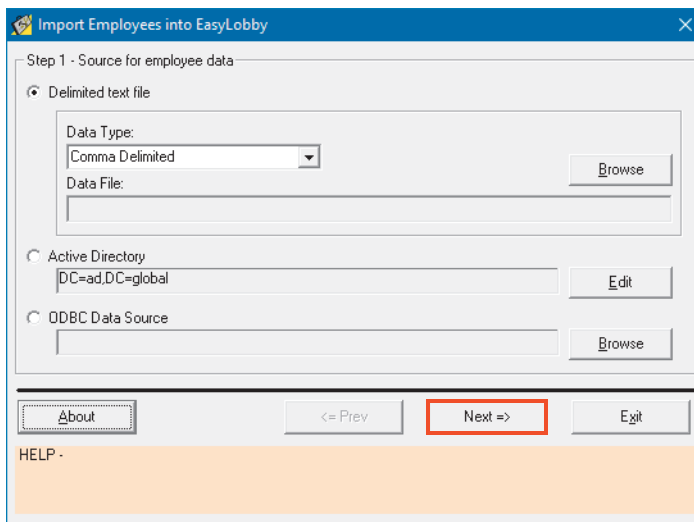
3. Select the EasyLobby database. For Microsoft Access databases click **Browse by Filename**. For Microsoft SQL Server and Oracle databases click **Browse by Data Source**. Click **Next =>**.
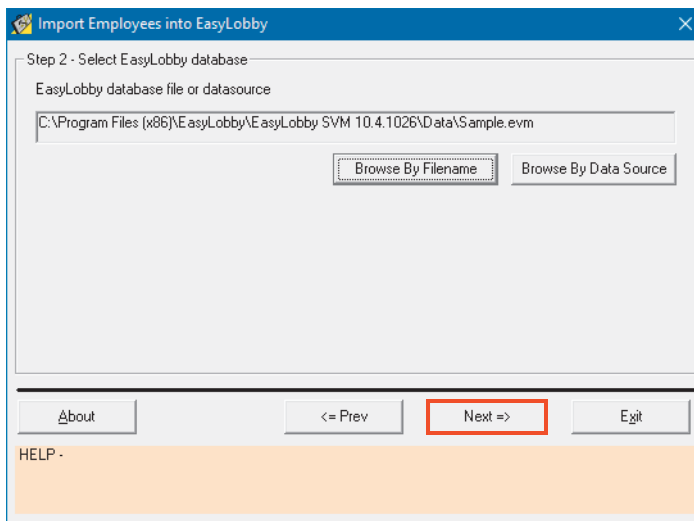
4. The next step is to map the fields in the source file to the fields in EasyLobby. To do this, in the **Source Fields** column click the down arrow ▼ to the right of the field you want to map. The list of fields available in the source file is displayed. Select the field that corresponds to the field in the **EasyLobby Fields** column. If the first record/row of the database contains field names (not employee data), check **First record contains field names**.

You can save the mapping for future use. This is useful if you are loading information from more than one source file, as you can save a separate mapping for each source. Click **Save Map** to save the map, **Load Map** to load a map, and **Clear Map** to clear the current selections.
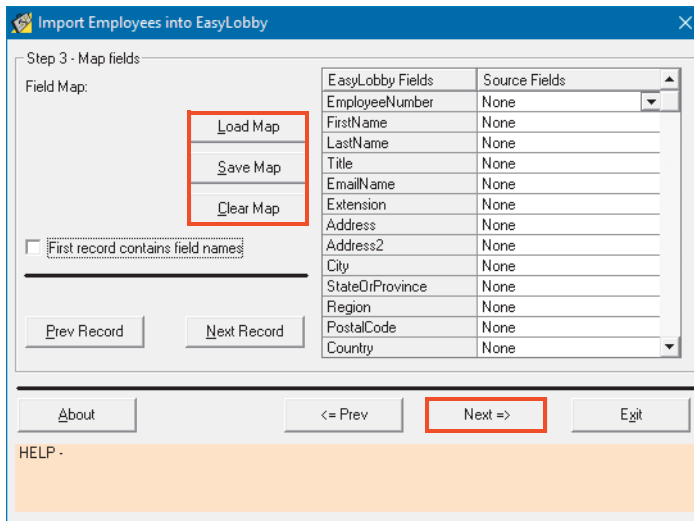
5. Click **Next =>**.
6. The import options allow you to control what happens when importing a database.
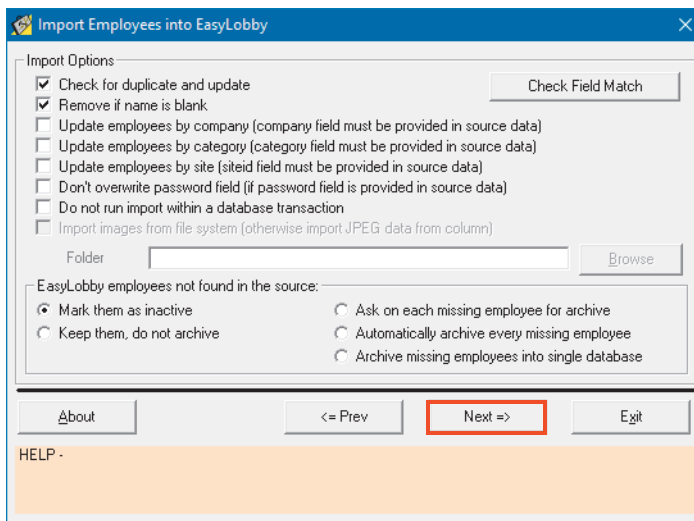
- Import Options

    Check for duplicate and update: If a duplicate record is found in the imported database, the matching record will be updated. Click **Check Field Match** to set which fields will be used to determine a match. Email is often the best data field to match against.
    Remove if name is blank: If an incoming record contains blank name fields, it will not be

imported. If this option is cleared, any record is imported even if it has blank name fields.

Update employees by company: The company field is used as a priority. Even if an imported record matches an existing record, a new record will be created if the company is different.

Update employees by category: The category field is used as a priority. Even if an imported record matches an existing record, a new record will be created if the category is different.

Update employees by site: The site field is used as a priority. Even if an imported record matches an existing record, a new record will be created if the site is different.

Don't overwrite password field prevents an employee's current password being overwritten by one present in an imported record.

Do not run import within a database transaction causes the employee import operations to be performed as separate SQL queries instead of using a single SQL *transaction*, which could be disallowed by the server.

- EasyLobby employees not found in the source:

  Mark them as inactive: If the imported file does not contain a record that matches an employee currently in the EasyLobby database, the employee will be marked as inactive (no longer employed).

  Keep them, do not archive: If the imported file does not contain a record that matches an employee currently in the EasyLobby database, the employee will remain and will not be marked as inactive.

  Ask on each missing employee for archive: If the imported file does not contain a record that matches an employee currently in the EasyLobby database, a prompt is displayed to allow you to save an archive file the employee. The employee is then deleted from the current database. The .evm archive file can be opened in EasyLobby for later reference.

  Automatically archive every missing employee: If the imported file does not contain a record that matches an employee currently in the EasyLobby database, an employee archive file (.evm) is saved automatically. The employee is then deleted from the current database. The .evm archive file can be opened in EasyLobby for later reference.

  Archive missing employees into single database: If the imported file does not contain records that match employees currently in the EasyLobby database, an employee archive file (.evm) is saved containing all the unmatched employees. The employees are then deleted from the current database.

7. Click **Next =>**.

8. Click **Start** to begin the employee database import.
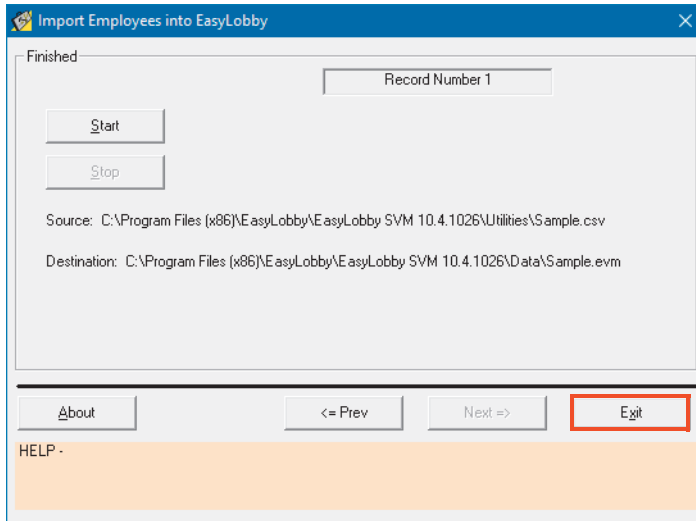
9. The window indicates when the employee database import has finished.
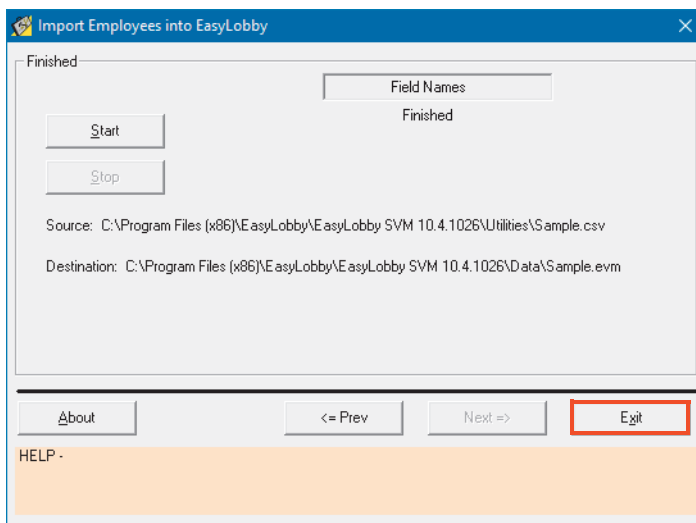
3.7.2.1 Import a photo

There are a number of picture fields, named Epic and Alt1Pic - Alt5Pic, that can be appended to the employee record fields and used to import photo data from image files. Photos must be stored separately from the database file. If a photo is stored in the same folder as the file being imported, the Epic or Alt*n*Pic field in the import record must contain just the filename, e.g. JohnSmith.jpg. If the photos are stored in a different folder, the database field must include the full path name, e.g. "F:\Pictures\JohnSmithFormal.jpg".

BI	BJ	BK	BL	BM	BN
ProxCardNo	**LoginName**	**CreationDate**	**ModifiedDate**	**Epic**	**Alt1Pic**
701601501401301	jsmith1	07/10/17 1:02	08/11/17 2:03	"JohnSmithFormal.jpg"	"JohnSmithCasual.jpg"

3.7.2.2 Schedule the employee import utility

After you have run the Employee Import Utility once, you can use the Windows Task scheduler to make it run automatically at preset intervals.

1. Open Control Panel and click **System** > **Administrative Tools** > **Task Scheduler**.

2. In the **Actions** column, click **Create Basic Task**.
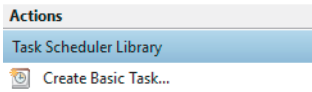
3. Type a name for the task and, optionally, a description. Click **Next >**.
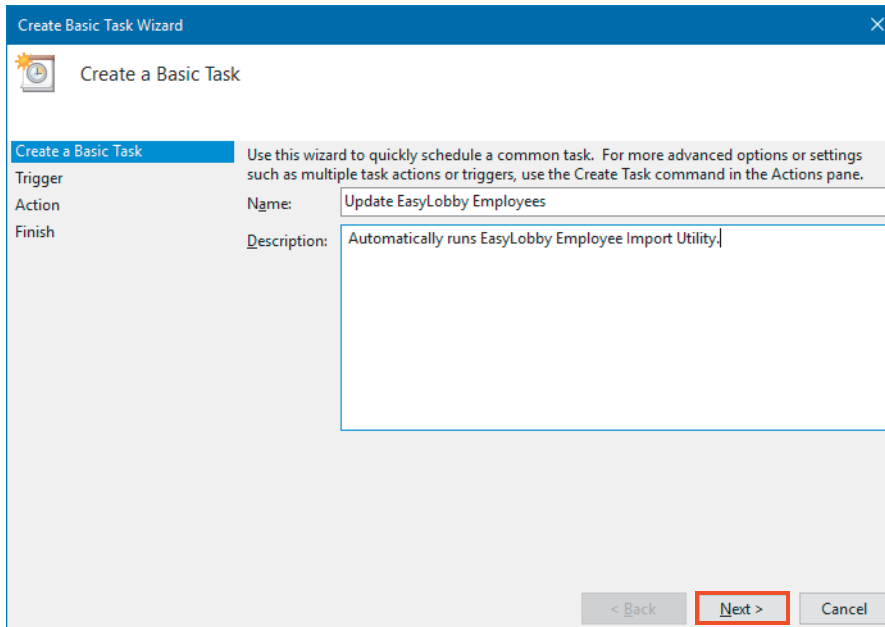
4. Select the frequency at which to perform the task. Click **Next >**.
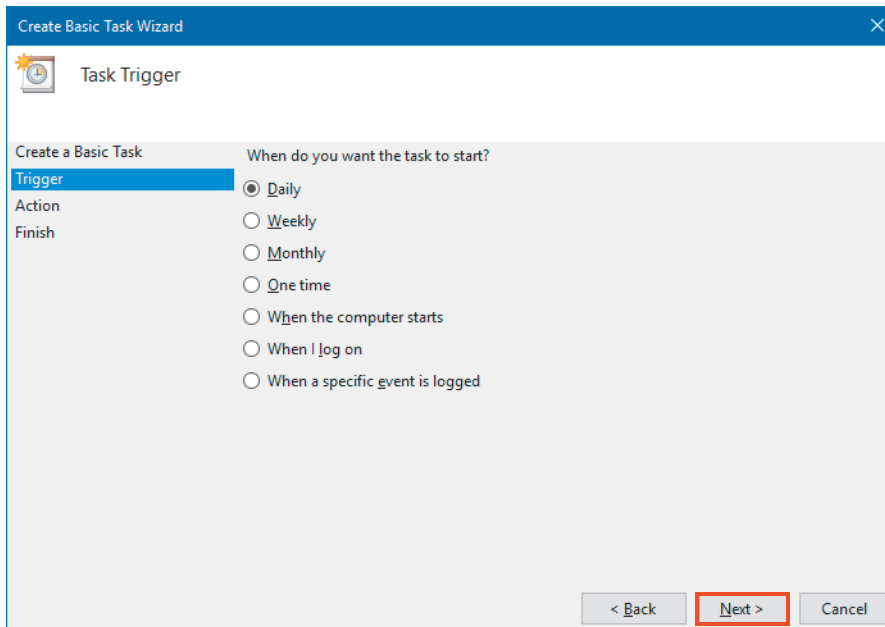
5. Select the start date and time for the task. Leave **Recur every** set to 1 to make the task run every day. Note that this dialog differs depending on whether you chose daily, weekly, monthly, etc., on the previous dialog.
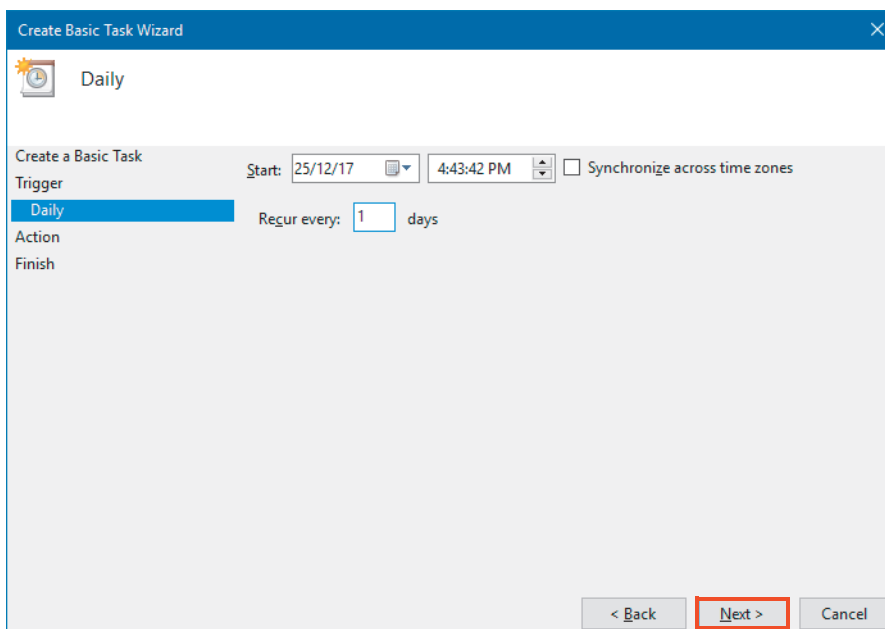
6. Select **Start a program** and then click **Next >**.
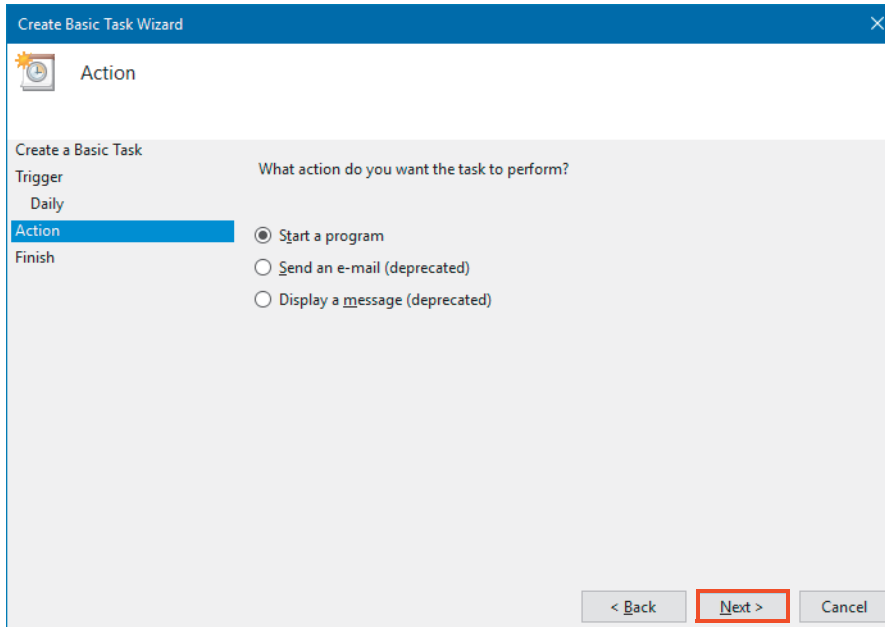
7. Click **Browse** and locate EmployeeImport.exe in the installation folder, normally C:\Program Files (x86)\EasyLobby\EasyLobby SVM 10.0\Utilities.

    In the **Add Arguments (optional)** box, type /s, then click **Next >**.
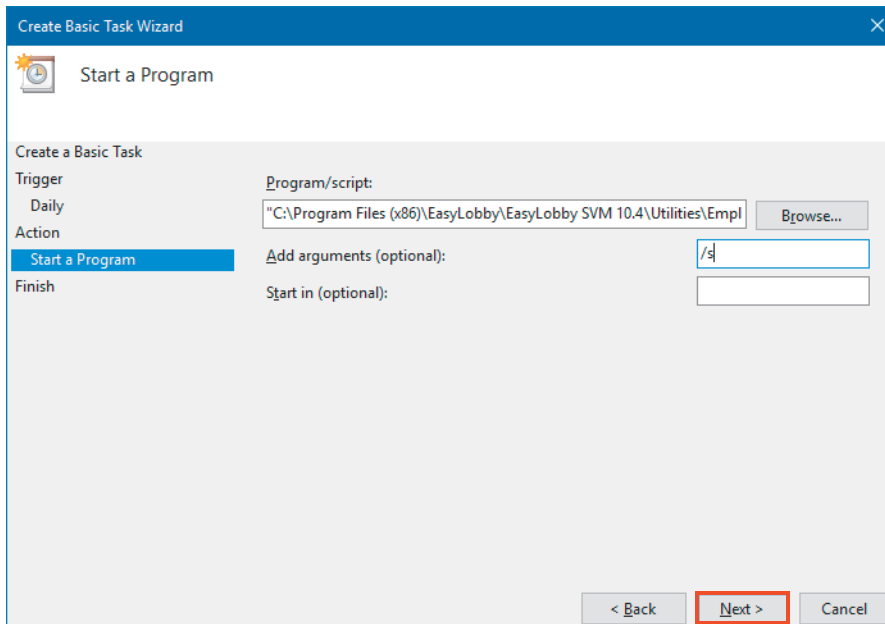
8. The final confirmation dialog indicates that the scheduled task setup is complete. Check the **Open the Properties dialog for this task when I click finish** option and click **Finish**.
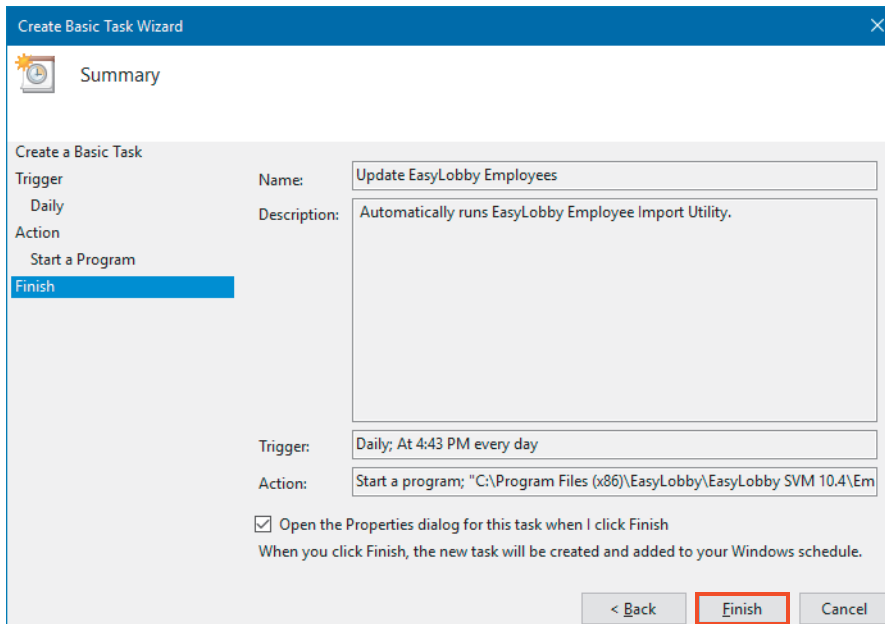
9. In the **Security options** area you can select the user account under which the task will run, typically an administrator account. The **Conditions** and **Settings** tabs allow you to further define when the task should run. Click **OK** to finish.
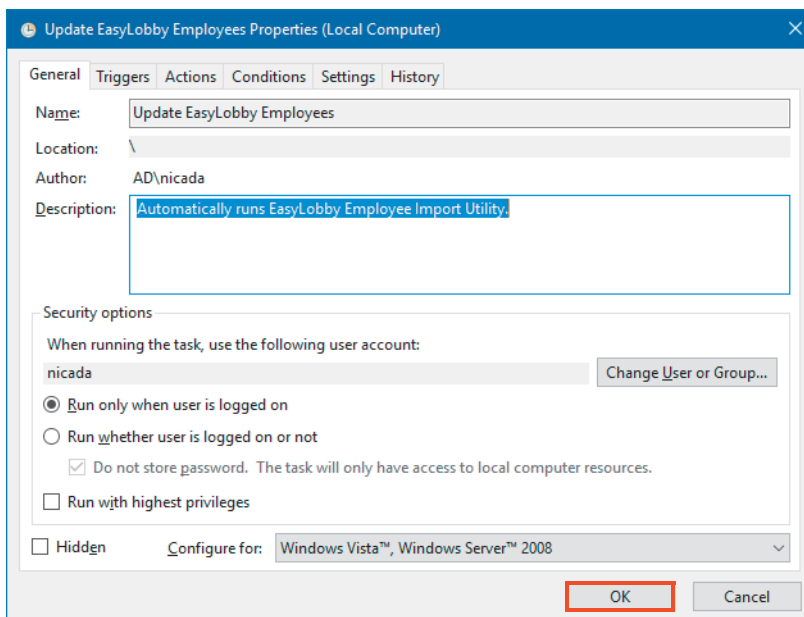
10. To make further edits to the task, select it in the list of tasks in the central pane of the Task Scheduler window, then click **Properties** in the right pane.
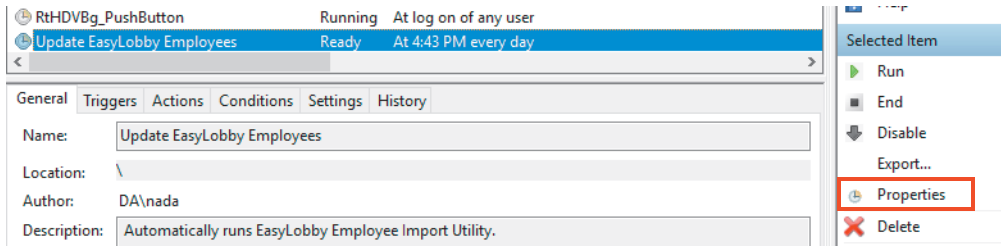
3.8   Categories

Categories allow you to group your visitors, employees or watch list items. For example, categorizing your visitors allows you to print badges that differ by category, and to take advantage of reports sorted by visitor category. The EasyLobby system administrator or manager can add or change categories in EasyLobby SVM or Administrator. The visitor categories appear in the **Category** drop-down on the visitor form, allowing the operator to quickly select a category.

3.8.1   Add a visitor category

1. To add or change categories click **Edit** > **Categories**.
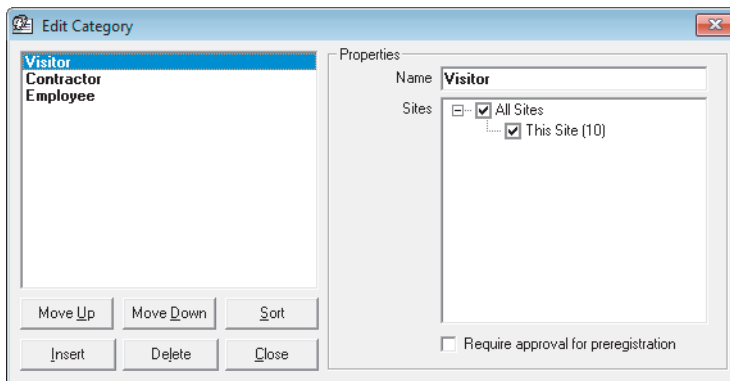
Note: If you created a new visitor log based on the sample file and preserved the categories, the categories are displayed. If you created an empty visitor log, you must add new categories.

The first category in the list is the default category that is used when a new visitor is added. Click **Move Up** or **Move Down** to change the order.

2. Click **Insert** to add a category. The **Edit Category** window is displayed with the **Name** set to New Category. The name you type is shown in the category list in visitor views. You can associate the category with all sites, a particular site, or multiple sites using the **Sites** box. Check **Require approval for preregistration** to set the category as a trigger for preregistration approval. See *Section A.5: eAdvance value-based approval*.
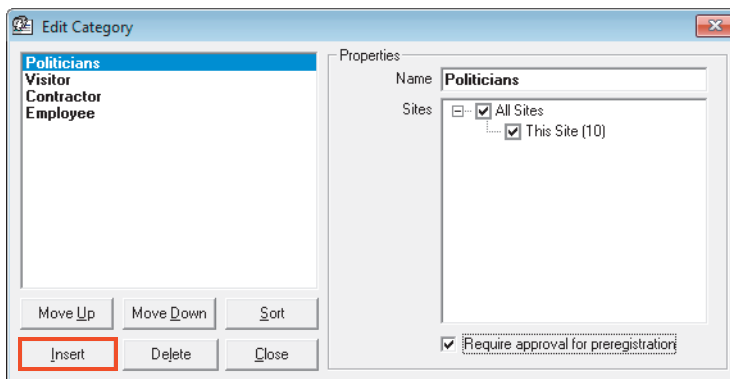
3. To edit category settings for an existing category, change the information displayed in the edit category window.

4. To delete a visitor category, select the category and click **Delete**.

3.8.2   Employee categories

Categorizing your employees allows you to limit the number of visitors to a category and to list employees by category.

1. To add an employee category, click **Employee** > **Categories**.

2. Click **Insert**. The **Edit Employee Categories** window is displayed with the **Name** set to New Category. The name you type is shown as the category in the employee list in visitor views.
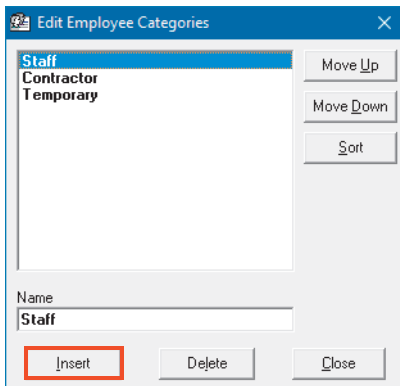
3. To edit an existing category, change the information displayed in the **Edit Employee Category** window for the category.

4. To delete an employee category, select the category and click **Delete** on the Edit Category window.

3.8.3   Watch list categories

Categorizing your watch list entries allows you to display whether the person is a welcome or unwelcome visitor.

1. To add a watch list category, click **Edit > Alerts** and select the **Watch List** tab. Click **Categories**.
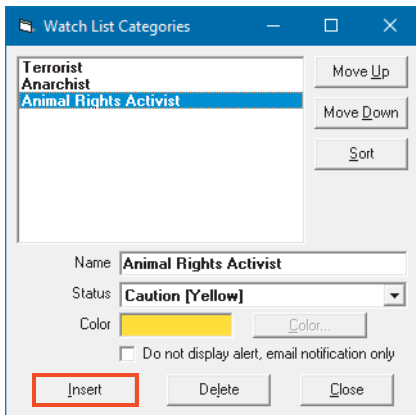
2. Click **Insert**. The **Watch List Categories** window is displayed with the **Name** set to New Category. The name you type is shown as the category in the watch list. Assign a status to indicate if the visitor is welcome.

3.9　Reasons for a visit

The reasons log contains information about the types of visits you expect to host. Reasons added in the reasons log are included on the **Reason** drop-down in the visitor views. The EasyLobby manager or system administrator can add, edit, or delete reasons.

To open the **Reasons** window, use any of these methods:

- Click **Edit** > **Reasons**.
- Double-click the **Reason** field in a single-visitor view.

Changes to the reasons log are saved automatically. You do not need to do anything to save your changes.
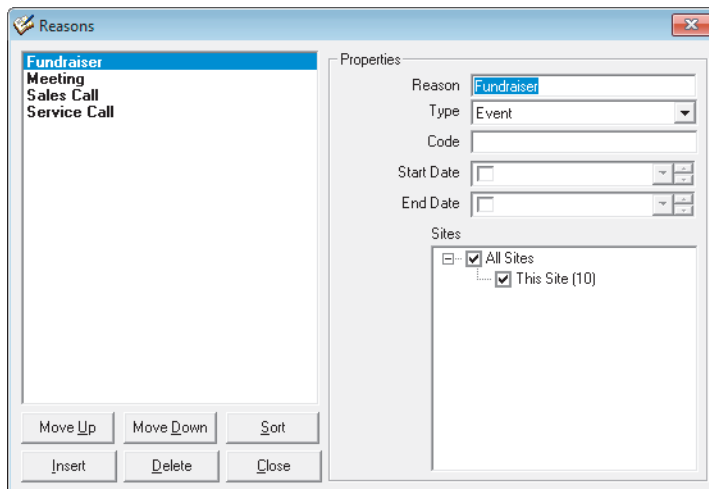
3.9.1　Add a reason

To add a reason or event:

1. In the **Reasons** window, click **Insert**.
2. In the **Reason** field, type the reason for the visit or the name of the event.
3. On the **Type** drop-down, select either **Reason** or **Event**. An event is something that happens at a scheduled time and is attended by several people. A reason may be an informal meeting or a personal visit.
4. Type a **Code** if your reasons are coded; if not you may leave this field blank.
5. To enter a date, select the **Start Date** or **End Date** check box. Once a date is entered you can use the up or down arrows on the date field to change the date or time by selecting the time or date and then the up or down arrow. You do not need to provide dates if they do not apply.
6. In the **Sites** box, select the site.
7. You can use **Move Up**, **Move Down**, and **Sort** to change the order of the reasons.
8. Click **Close**. Changes to the Reasons log are saved automatically.

3.9.2　Delete a reason

To delete a reason or event:

1. In the **Reasons** list, select the reason.
2. Click **Delete**.

3.10 Signature types

A signature type denotes the purpose of a signature, whether it is a document or a delivery. There are signature types for visitor, package, asset, and lost & found items. The EasyLobby system administrator or manager can add or change signature types in EasyLobby SVM or Administrator. To learn more about displaying documents, see *Section 3.4.6: Self Registration tab* and *Section 3.4.6.2: Behavior Options tab*.

3.10.1   Add, edit, or delete a signature type

1. Click **Edit** > **Signature Types**.
2. Click either the **Visitor**, **Package**, **Asset** or **Lost & Found** tab for the signature type.
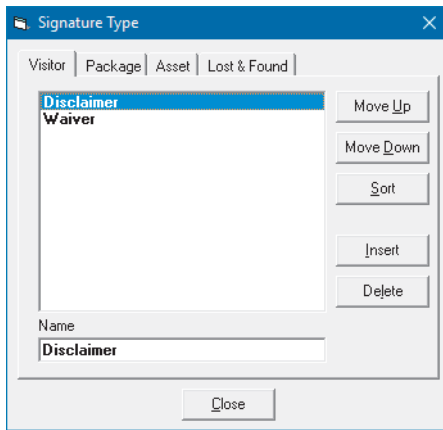
The first signature type in the list is the default type to use when a new visitor is added. Click **Move Up** or **Move Down** to change the order. Click **Sort** to list the signature types alphabetically.

3. Click **Insert** to add a signature type. The signature type is displayed with the name set to New Signature Type. The name you type is shown in the signature type list in visitor views.
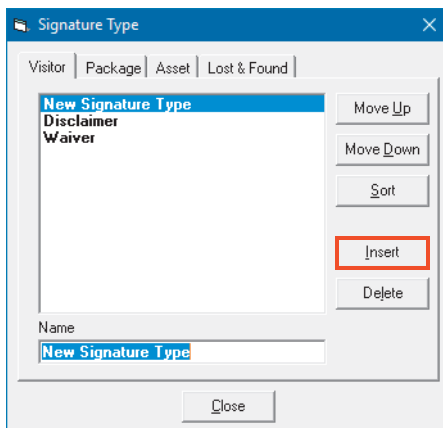
4. To edit a signature type, change the information displayed in the **Name** box for the selected signature type.
5. To delete a signature type, select the signature type and click **Delete**. You are prompted if you want to delete this signature type. Click **OK**.

3.11 Alerts

You can set up alerts to indicate when a visitor has reached a number of visits, is considered a VIP, is not welcome, has an expired badge but has not checked out, or either a host or facility has reached a maximum amount of visitors.

3.11.1 Watch List tab
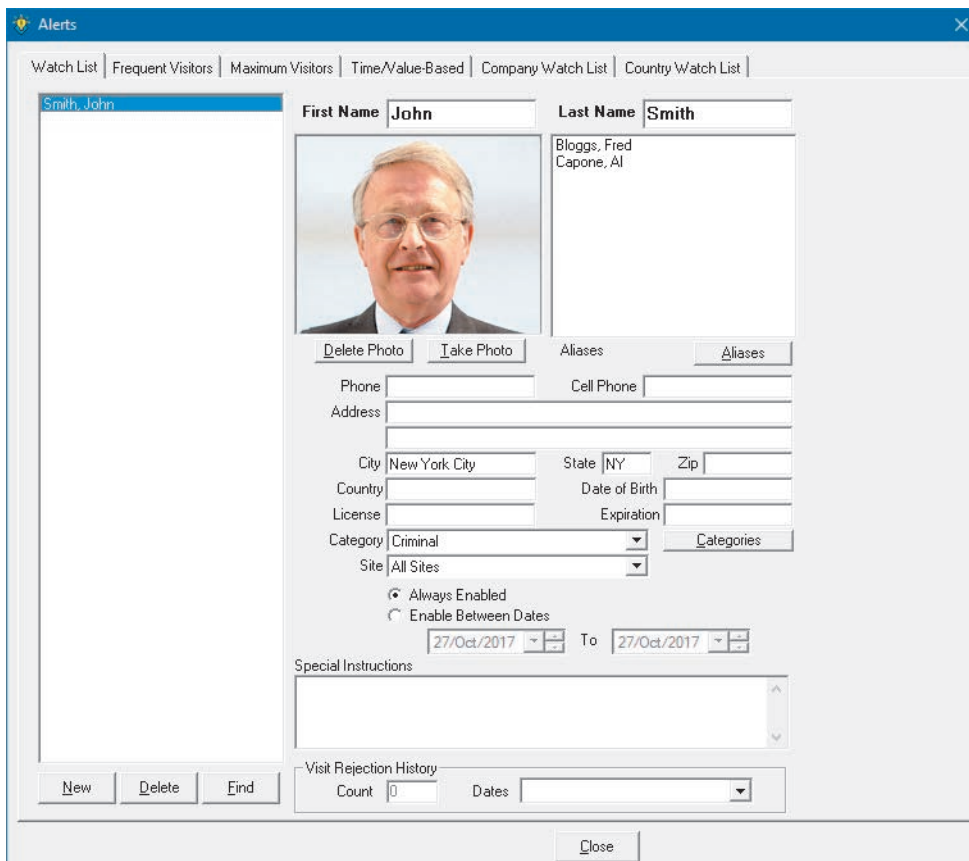
The watch list highlights attention to visitors, for example:

- They are white-listed, such as a VIP or board member.
- They are grey-listed, such as someone who is permitted on site but requires supervision.
- They are black-listed, such as individuals you do not want on site.

Only managers and administrators can add to the watch list by default. You can add existing visitors to the watch list or create a watch list entry from scratch. Watch list alerts are displayed on screen for your operators to review. For details about sending watch list alerts by email, see *Section 3.4.7.3: Watch List Alert tab*.

3.11.1.1 Add a previous visitor to the watch list

1. Find the visitor to add to the watch list in either the grid view or a single visitor view.
2. Click **Visitor** > **Add Visitor to Watch List**.
3. The watch list is displayed with the current visitor record.

4. Select the watch list category, change any information, load or delete the photo, and add any special instructions.

3.11.1.2 Add a new person to the watch list

1. Click **New**.

2. A blank watch list form is displayed.

3. Type the person's name and contact information, photo (optional), aliases, category, whether the alert is always enabled or valid for specific dates, and any special instructions. Watch list categories are managed in *Section 3.8.3: Watch list categories*.

   To manage watch list settings for when you would like the watch list queried, and what actions to take, see *Section 3.4.5.1: Check In tab* and *Section 3.4.7.3: Watch List Alert tab*.

3.11.2   Frequent Visitors tab

The frequent visitor alert indicates when a visitor has reached a specified number of visits and what action to take. This may be used if you plan to enforce limits on the number of times a visitor can come on site, or if you have a minimum threshold before a visitor receives a permanent badge. Only managers and administrators can add frequent visitor alerts. Frequent visitor alerts are displayed on screen for the operator during check in.

To add a frequent visitor alert:

1. Click **New** to add a new alert. A new alert is added with the name New Alert. Type a name for the new alert.

2. Check the **Enabled** option to enable the alert.

3. Specify the **Initial Alert Display**. This is the number of visits after which the alert should display and whether the alert should display one time only or on every visit after the qualifying visit.

4. Specify the **Alert Timeframe**. The choices are to start counting visits for the alert:
   - From the beginning
   - Within a number of days (on a rolling basis) that you specify
   - Within a calendar year, quarter, month, or week.

5. If applicable, type instructions to display with the alert. For example, the visitor may have to complete a form after their 10th visit, or a report may have to be run after a visitor's 5th visit in 90 days.

6. Specify the **Display Stop Option**. This is a check box on the alert that allows you to turn off the alert for the particular visitor. The choices are:

- Never display the stop the alert check box
- Stop displaying the alert after the specified number of visits per timeframe
- Always display the stop the alert check box.
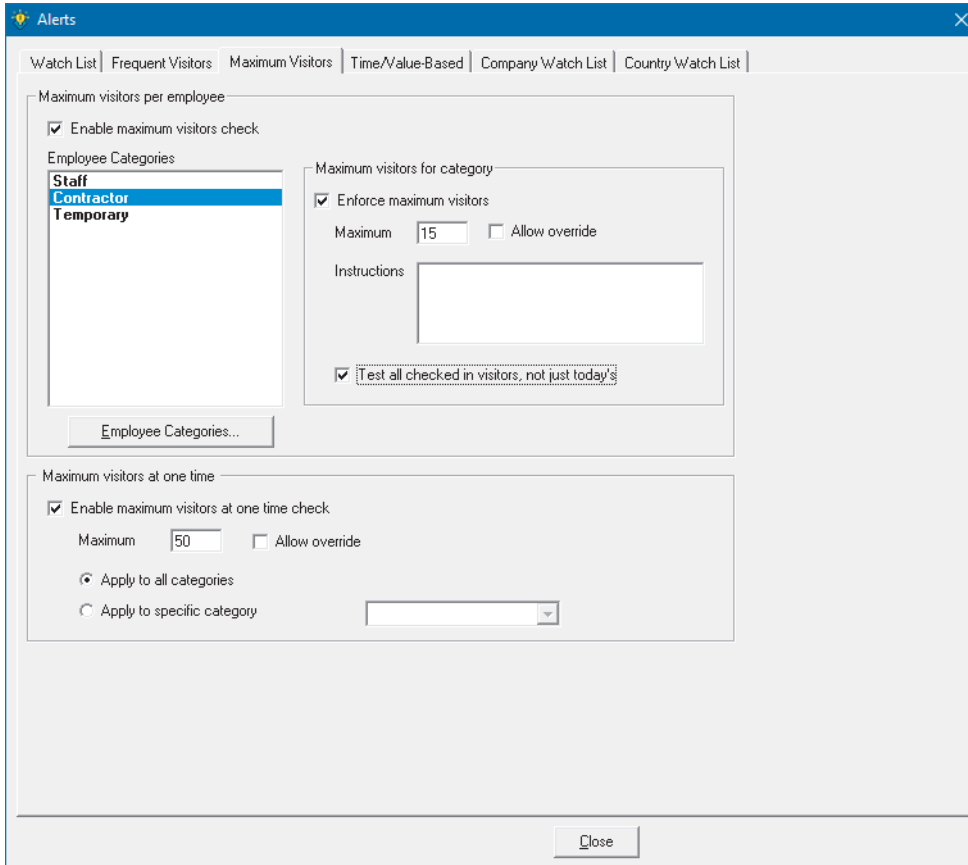
Note: Once the alert is turned off for a visitor, it never shows again for that visitor.

7. Specify the **Applicable Visitor Category**. You can apply the alert to:

- All categories
- To all categories, but exclude a particular category
- To a specific category.

3.11.3   Maximum Visitors tab

The maximum visitors alert indicates when the maximum number of visitors for a particular host (e.g. employee) has been reached, and/or when a total maximum number of visitors has been reached. This allows you to set maximum visitor limits for certain types of hosts.

1. Check the **Enable maximum visitors check** option to set the maximum visitors for an employee. Select the employee category and check **Enforce maximum visitors** for that category. Type the maximum number of visitors, if the maximum can be overridden, and any instructions. Repeat for each employee category.

2. Check the **Enable maximum visitors at one time** option to set the maximum visitors for the enterprise. Type the maximum number of visitors, if the maximum can be overridden, and if it applies to all visitor categories or a specific category.

3.11.4 Time/Value-Based tab

Time/Value-Based alerts allow you to track certain actions or enforce rules over time. For example, you may choose that a Non-Disclosure Agreement be considered valid for 1 year, and then require that it be re-signed.
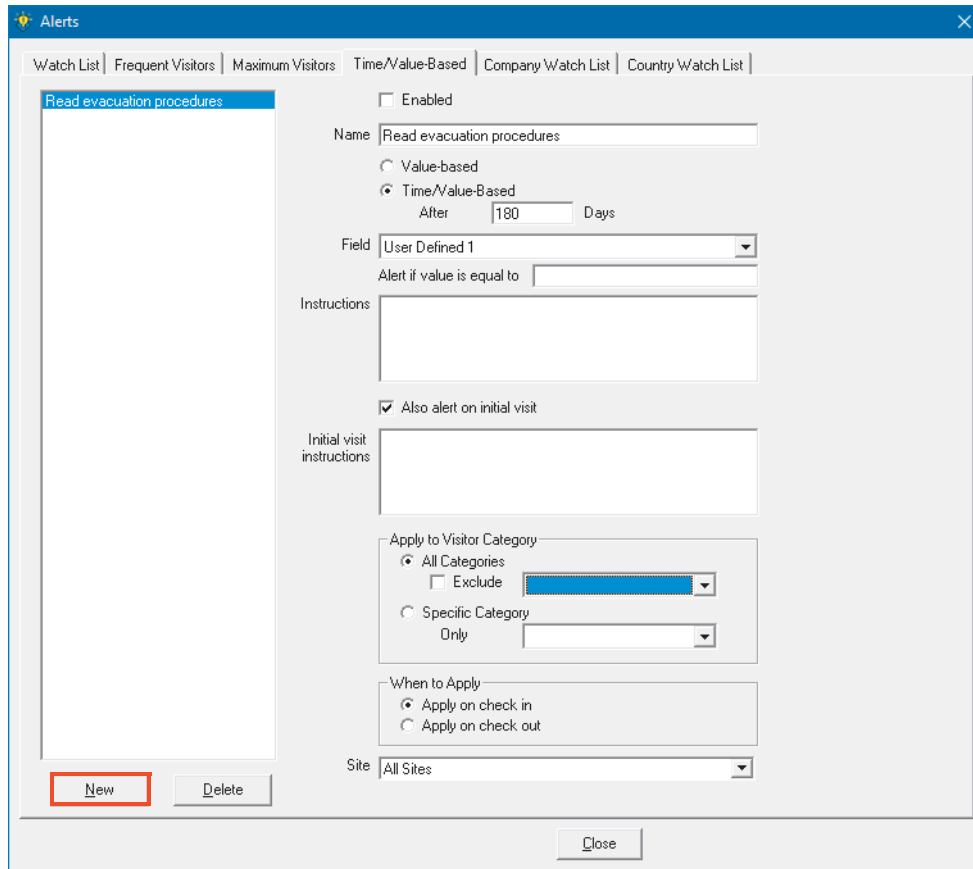
A time-based alert is displayed at check-in if a specified number of days has elapsed since the visitor's last visit. This can be used to ensure that the visitor reviews safety procedures every six months, for example.

A value-based alert can be used to check a value held in a user-defined field. The triggering of a value-based alert depends on the control type of the user-defined field (see *Section 3.4.3.1: Visitor User Defined tab*, control types):

- Text: If the text in the user-defined field on the visitor's record is the same as the text specified for the alert, the alert is displayed at check-in.
- Check box: If the check box in the user-defined field on the visitor's record is selected, the alert is displayed at check-in.
- Combo: If the combo box in the user-defined field on the visitor's record is set to the value specified in the alert, the alert is displayed at check-in.
- Date: If the date in the user-defined field on the visitor's record has already passed, the alert is displayed at check-in.

When you use the **Field** drop-down to select the user-defined field, the label and control just below the drop-down change in response to the user-defined field's control type.

1. Click **New** to add a new alert. A new alert is added with the name New Time-Based Alert. In the **Name** box, type a name for the new alert.

2. Check **Enabled** to enable the alert. Time/Value-Based alerts will appear on screen for your operator to review at the time they are triggered.

3. Select **Value-based** to trigger the alert on the value of a user-defined field.

   a. Select the user-defined **Field** that will hold the trigger value. The label and control below the **Field** box change to allow you to enter the required information relevant to the user-defined field's control type.

   b. Enter the value, date, or combo box selection that will trigger the alert. If the user-defined field is a check box, no value is required.

4. Select **Time/Value-based** to trigger the alert on the value of a user-defined field, or after a specified number of days after the initial visit.

   a. Type a number of days in the **After** box.

   b. Follow the instructions in step 3 if you also want to trigger the alert on the value of a user-defined field).

5. In the **Instructions** box, type any instructions to display on the alert.

6. **Also alert on initial visit** will cause time-based alerts to show on the first visit.

7. Specify the applicable visitor category. You can apply the alert to:

   - All categories
   - All categories, but exclude a particular category
   - A specific category.

3.11.5 Company Watch List tab
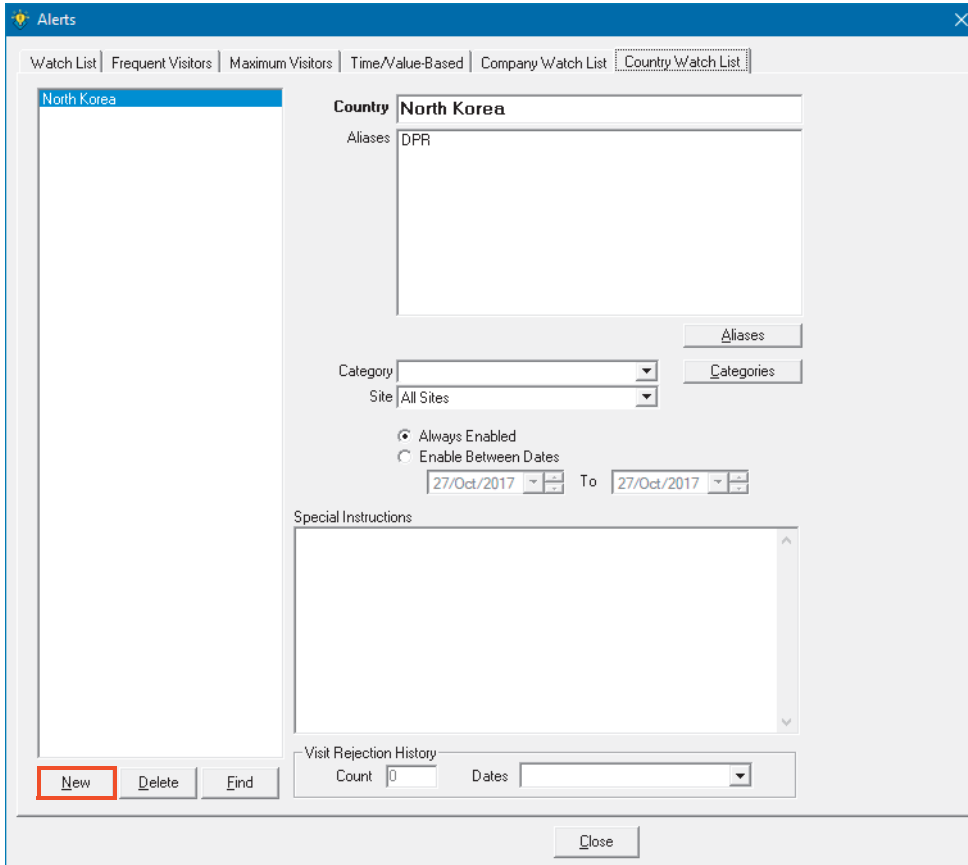
The company watch list highlights attention to visitors from a specific company. Only managers and administrators can add to the watch list. You might want to add Companies to the Company watch list if you would like a particular action taken every time a representative of that company is on site. For example you may want to notify a manager when a consultant company is on site, or perhaps provide keys and a ladder anytime someone from a repair company arrives.

To add a company to the company watch list:

1. Click **New**.
2. A blank company watch list form is displayed.
3. Type the company's name and contact information, aliases, category, whether the alert is always enabled or valid for specific dates, and any special instructions. This alert will appear on the operator's screen during the check in process if a match is found.

3.11.6 Country Watch List tab

The country watch list highlights attention to visitors from a specific country. Only managers and administrators can add to the watch list. This feature is typically used if you need to require additional documentation or agreements for visitors from certain countries.

To add a country to the country watch list:

1. Click **New**.
2. A blank country watch list form is displayed.
3. Type the country's name and contact information, aliases, category, whether the alert is always enabled or valid for specific dates, and any special instructions. This alert will appear on the operator's screen during the check in process if a match is found.

3.12 Clearance

Clearance is used to allow or deny entry at any EasyLobby station or satellite. The EasyLobby system administrator or manager can add or change clearances in EasyLobby SVM or Administrator.

1. Click **Edit** > **Clearances**.
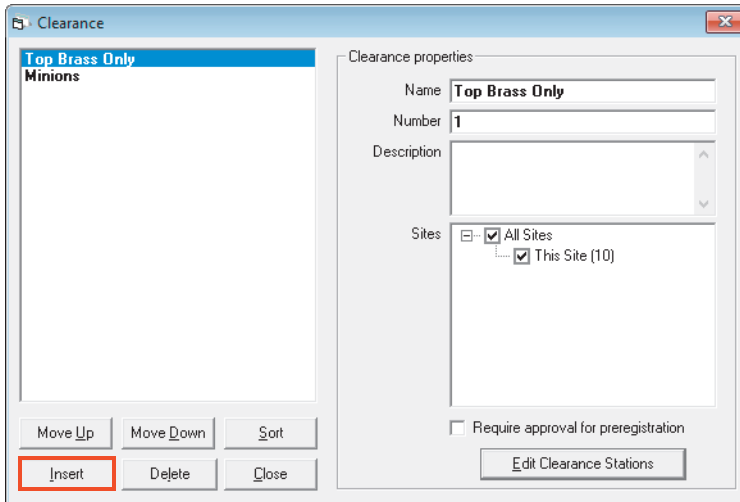
2. Click **Insert** to create a new clearance. A clearance is created with the name New Clearance.
   - In the **Name** box, type a new name for the clearance level.
   - Type a number, if applicable and description.
   - Select the Site, Sites, or All Sites for the clearance level.
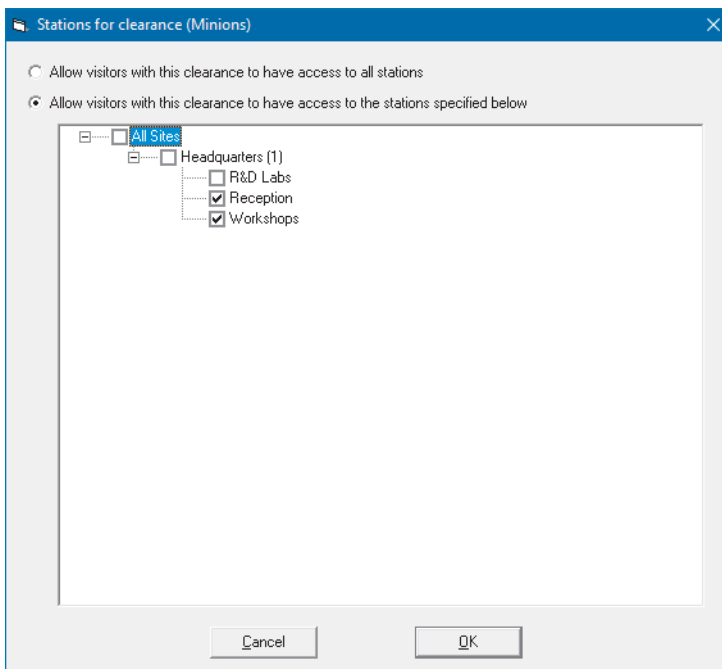
3. Click **Move Up** or **Move Down** to change the order. Click **Sort** to alphabetize the list.
4. Click **Delete** to delete a particular clearance and click **Close** to exit the **Clearance** window.

3.13 Parking lots and spaces

You can assign and release parking lots and spaces to visitors and employees. Only managers and administrators can add, edit, and delete parking lots and spaces. This feature is typically used when visitors or employees check in at a guard shack prior to parking their vehicle. It also allows you to manage parking lot limits.

To add parking lots and spaces:

1. Click **Edit** > **Parking**.
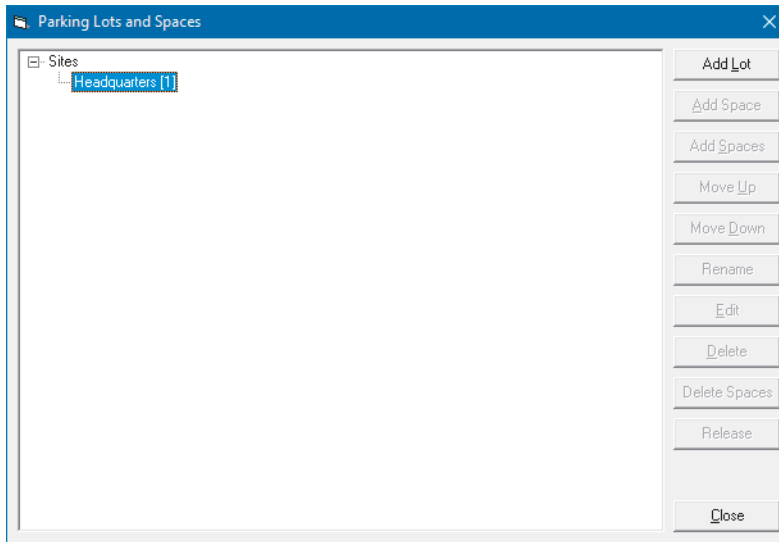
2. Select the site and click **Add Lot** to add a parking lot. Name the new parking lot. Click **Add Spaces** to setup the spaces available in the lot.
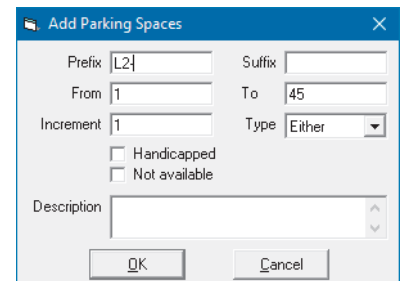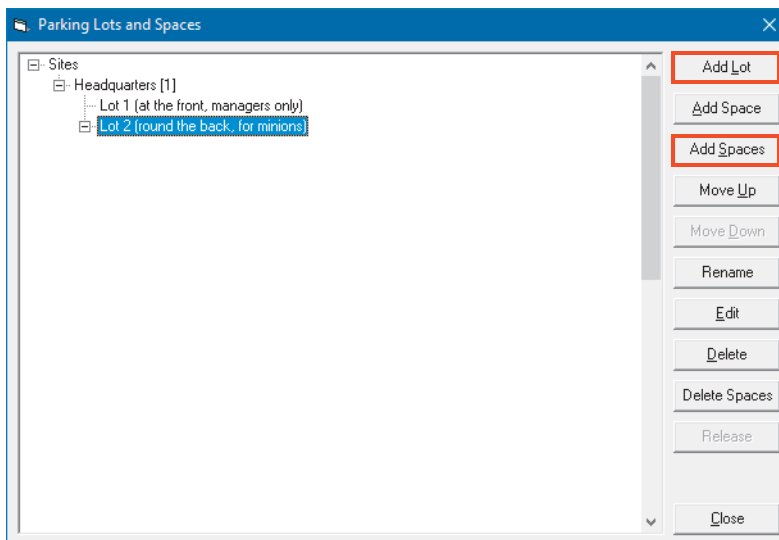
3. Click **Close** to exit the **Parking Lots and Spaces** window.

3.14 Conference rooms

You can assign and release conference rooms and spaces to visitors and employees. Only managers and administrators can add, edit, and delete conference rooms. While this feature allows you to track what room visitors have been assigned to, it does not enforce strict limits or 'hold' the room like a building management application.

To add conference rooms:

1. Click **Edit** > **Conference Rooms**.
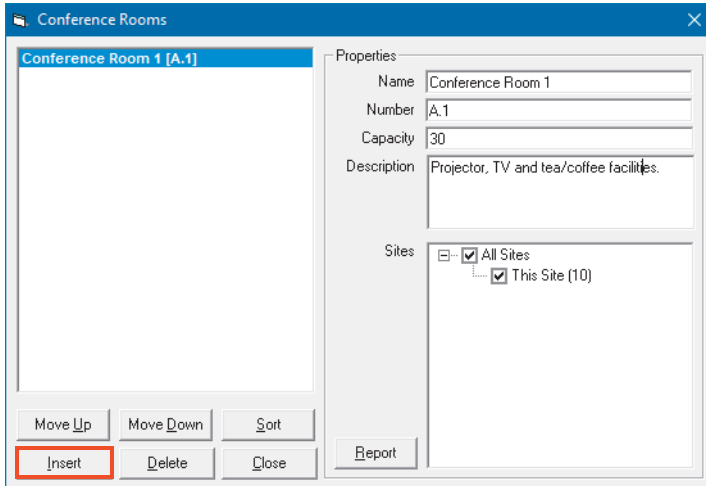
2. Select the site and click **Insert** to add a conference room. Name the new conference room. You can reorder them with the buttons at the bottom.

3.15 Vehicle types

The vehicle type indicates the type of vehicle, for example an SUV or truck, etc. The vehicle types are used when specifying vehicles for visitors and employees, either within the **Vehicle** tab on the Visitor or Employee form, or if you are assigning parking spaces. The EasyLobby manager or system administrator can add, edit, or delete vehicle types.

To set up vehicle types:

1. Click **Edit** > **Vehicle Types**.
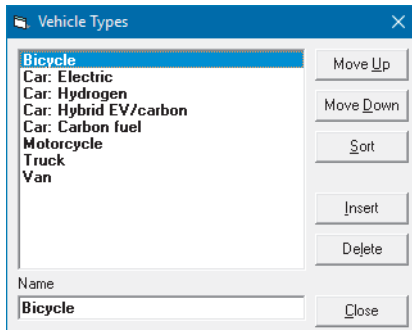
The first vehicle type in the list is the default type that is used when a new visitor is added. Click **Move Up** or **Move Down** to change the order. Click **Sort** to list the vehicle types alphabetically.

2. Click **Insert** to add a vehicle type. Type a new description in the **Name** box. This name will be shown in the vehicle type list in visitor views.
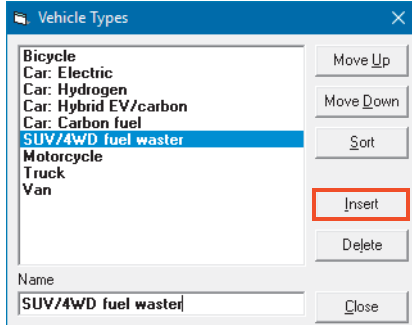
3. To rename a vehicle type, select it in the list and edit the description in the **Name** box.
4. To delete a vehicle type, select the vehicle type and click **Delete**.

3.16 Use EasyLobby on a network

Once a visitor log has been created, it can be easily networked to other computers with EasyLobby installed. The visitor log file to be shared must be created and stored in a location on the network that can be accessed by all the computers running EasyLobby. Each computer must have the ODBC data base installed; see *Section 2.6: Install the database*. To network each EasyLobby computer, follow these steps.

1. Start EasyLobby on each computer. Log in with administrator or manager access.

2. Click **File** > **Open Visitor Log** > **Data Source**. Select the required ODBC visitor log (Microsoft SQL Server, or Oracle).
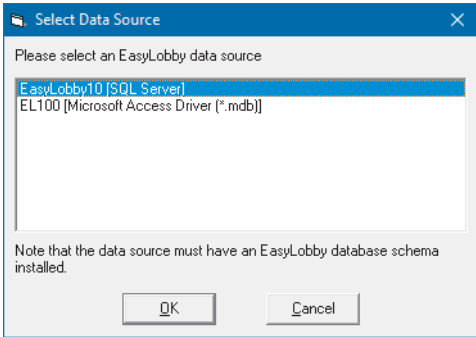
3. In the **Login To** window, type a user name and password for this log.
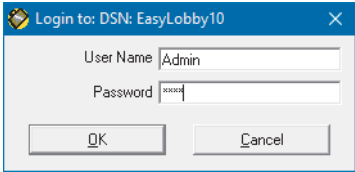
4. Click **OK**.

3.17 Export data and system maintenance

You can export records from a database to a file that can be read by many databases and spreadsheets. To export records, follow these steps:

1. Click **File** > **Export**.
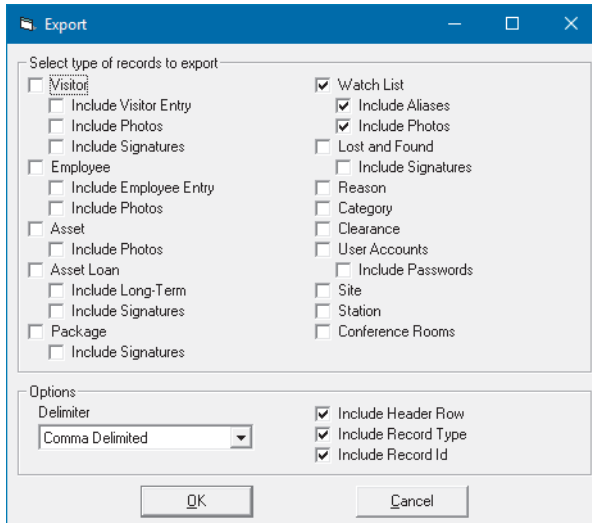
2. In the **Select type of records to export** frame, select the items that you wish to export.

3. In the **Options** frame, select the **Delimiter** character (separator) to be used in the output, and if the header row, record type or record Id should be included.

4. Click **OK**.

5. Type a name for the export file and select the export file format. The file is an ASCII file with fields separated by the chosen delimiter (asterisks, tabs, or commas).

6. Click **Save**.

3.17.1 Archive inactive employees

You can archive all records associated with inactive employees.

1. Click **File** > **Visitor Log** > **Archive Inactive Employees**.
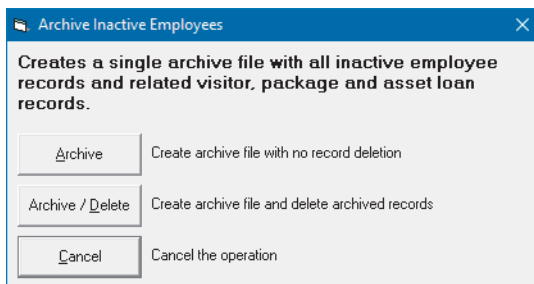
2. Click one of the following actions:
   - **Archive** creates an archive file without deleting the archived files.
   - **Archive/Delete** creates an archive file and deletes archived records.
   - **Cancel** cancels the operation.

3.17.2 Visitor maintenance

This allows you to perform an enterprise level system cleanup on your visitor records.

- Check out visitors that have checked in, but have not checked out.
- Delete blank visitor records.
- Delete preregistered visitors that did not check in.
- Delete visitors that never checked in, for visitors created before a date and time you specify.
- Delete all logo images, all custom badges.
- Reset all options to the program default (factory settings).

1. Click **File** > **Visitor Log Maintenance**.
2. For each category, carefully select the date and time to limit the items to which the maintenance action will be applied. Select the option to enable the action.
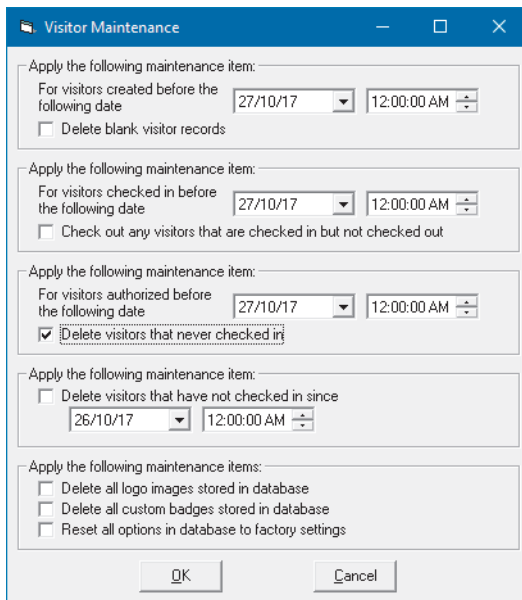
3. Click **OK**.

3.18 View current properties and users

If you are logged in as an administrator, you can see the properties of the current database in both EasyLobby SVM and Administrator. The properties shown include the filename and location of the current file, the database version used to create the log, and the last backup date and time.

1. Click **File** > **Visitor Log** > **Properties**. The **Visitor Log Properties** window also shows your current user name and security level.
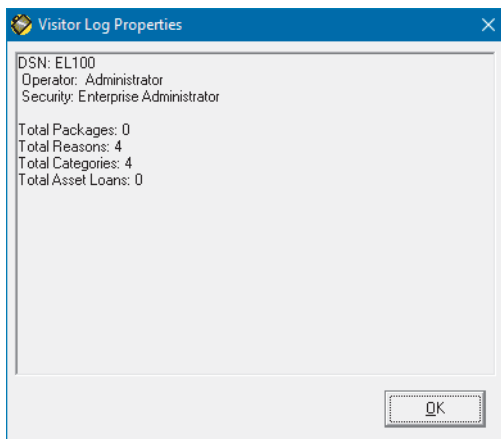
2. Click **Edit** > **Active Logins** to view the active logins,
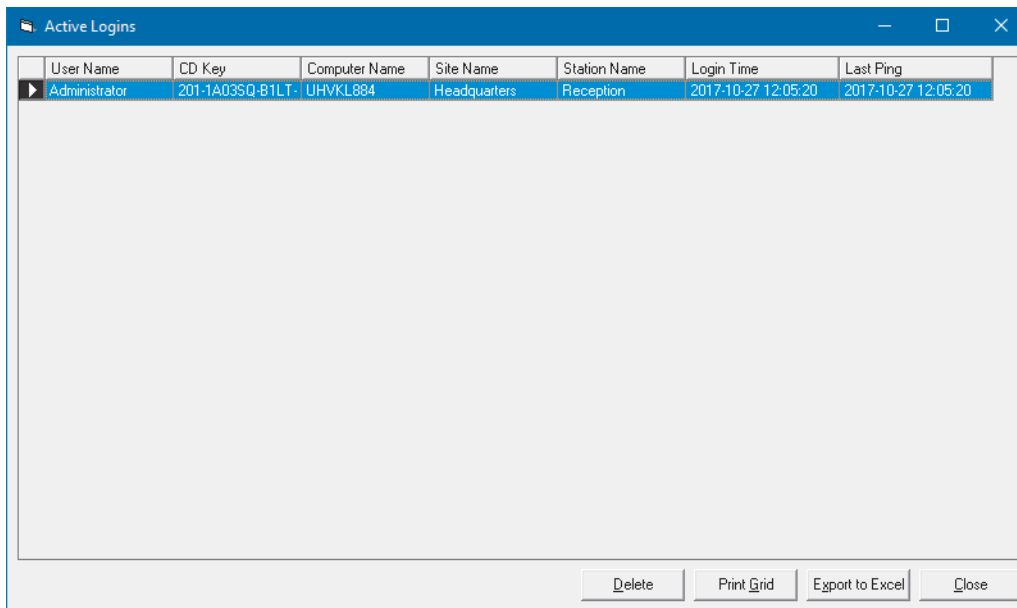
3. To view the event log, click **Edit** > **Event Log**. This displays a listing of all logins.
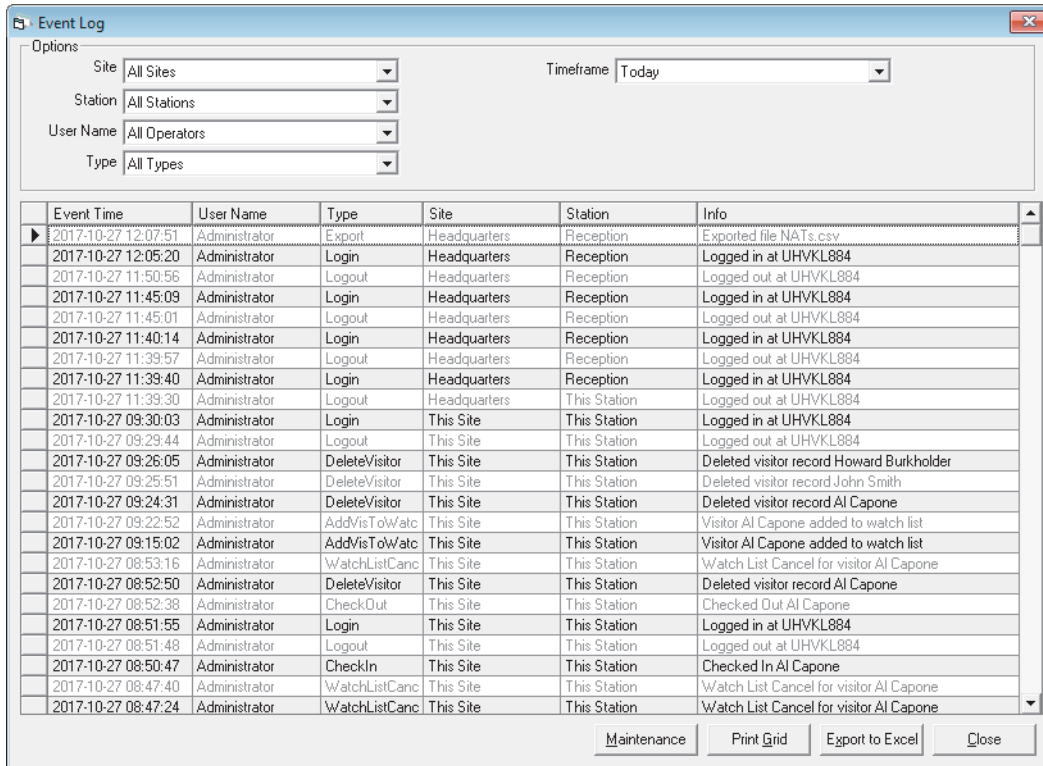
4. Use the **Options** drop-down controls to filter the results.

- Options

    Site filters the list according to the login site.

    Station filters the list according to the login station type.

    User name filters the list according to user account.

    Type filters the list according to the event type.

Click **Maintenance** to display the **Event Log Maintenance** window. This allows you to choose a range of events to delete.

Click **Print Grid** to print the currently displayed range of events.

Click **Export to Excel** to immediately open an Excel file populated with the currently displayed range of events (requires Microsoft Excel).

Click **Close** to close the **Event Log** window.

Start EasyLobby SVM

4.1 Start and login to EasyLobby SVM

To start EasyLobby SVM, either double-click the EasyLobby SVM icon on your desktop or click **Start** > **EasyLobby 10.0** > **EasyLobby SVM 10.0**.

You are prompted to login with your user name and password:

Your user name (login name) gives you an authorization level. If you need a higher authorization level, contact your EasyLobby system administrator. If your EasyLobby system administrator has not set up user names and passwords, you can login with the user name 'Admin' and the password 'pass'. Your login name will be automatically entered in the visitor's operator field when creating new visitors. When you start EasyLobby, the *visitor log* used in the previous session is automatically opened, along with any other windows you had open in your previous session. The *visitor log* is another name for the database that holds the EasyLobby records.
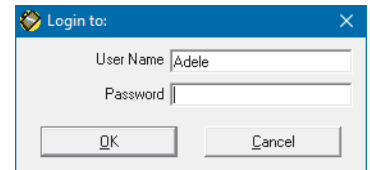
4.1.1 Open a visitor log

EasyLobby remembers which visitor log was used during the previous session. It automatically tries to open this log when the program starts. Users with operator level and lower access levels cannot choose which visitor log file to open. Visitor logs have a file extension of .evm (Electronic Visitor Management). The visitor log file can be stored on a local disk for single users. For multiple locations running EasyLobby, store the file on the network where all the computers that will use the file can read and write to the file. To open a visitor log, follow these steps:

1. Click **File** > **Open Visitor Log**.

    - To open a Microsoft Access visitor log, click **Filename**. Select the log you want to open and click **Open**.

    - To open an ODBC visitor log, click **Data Source**. Select the log you want to open and click **OK**.
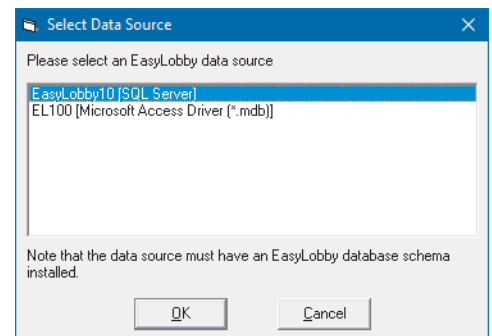
4.1.2 Log out of EasyLobby

You may wish to log out without exiting the system if another user plans to use EasyLobby from the same workstation, for example during a shift change at a lobby front desk. To logout of EasyLobby, but not exit the system, click **File** > **Logout** on the menu, or press **Ctrl+L** on the keyboard. You are automatically logged out of EasyLobby and the **Login to:** window is displayed. You or another user can now log in.
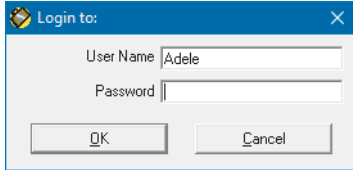
4.1.3 Change password

This allows any operator to change their password. This is recommended as initial passwords are set by an Administrator on behalf of other users. If the new password does not meet complexity requirements, you will be prompted to provide a new password. Details about setting up password requirements are covered in *Section 3.4.5.9: Password tab*.

1. Click **File** > **Change Password**.
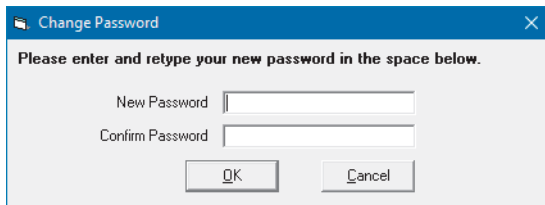
2. Type your current password, new password, and new password again to confirm the password.
3. Click **OK** to change the password.

4.1.4 Close EasyLobby

Click **File** > **Exit**. If the **Prompt for database backup reminder every** security setting is on (see *Section 3.4.5.5: Backup tab*) the following message might be displayed when exiting EasyLobby
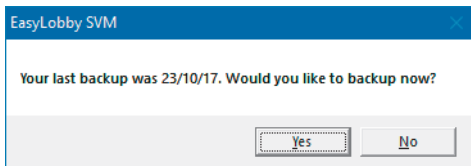
Note: If the reception desk is unattended, you should exit from EasyLobby to prevent unauthorized users from adding visitor information and printing badges.

4.2   Self-registration mode

An EasyLobby self-registration station allows visitors to enter their information or swipe their ID to locate or create a visitor record, take their own picture, and print themselves a badge. EasyLobby system administrators customize the self-registration choices for screen setup, languages, and hidden and required fields. See *Section 3.4.6: Self Registration tab*. You can run your SVM workstation in self-registration mode by signing in using the self-registration login and password. You can use the same workstation (at different times) for both assisted and unassisted visitor check-in.

4.2.1   Start and login to self-registration mode

To start EasyLobby in self-registration mode, you must first setup a user with the Self Registration security level. Click **Edit** > **Users** and create a new user, selecting Self Registration in the **Security Level** drop-down.

To start EasyLobby on a self-registration station:

1. Click **Start** > **EasyLobby 10.0** > **EasyLobby SVM 10.0**.
2. Type the self-registration user name and password. The self-registration security level gives the station lower access privileges than an operator or novice user. Visitors will not be able to see the records of other visitors.
3. Once the self-registration mode has started, the mouse is no longer necessary and can be placed below the desk.

If you have a camera attached to this computer which has been setup by the EasyLobby system administrator, visitors can take their own photo. The simple Take Photo dialog can be used so all input is via the keyboard, and no mouse is required.

4.2.2   Close self-registration mode

To close the self-registration application, press **Esc** and type the password for the self-registration operator. EasyLobby closes. A password is required to close self registration mode to prevent visitors from gaining access to your computer's desktop or other screens.

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Visitor and employee views

EasyLobby provides two ways to view visitor and employee information — the grid view and the form view. You can open the grid view and one or more form views at the same time. Displaying multiple form views is a visitor default option under the program options menu (see *Section 3.4.2.2: Visitor tab*).

The grid view is capable of showing all information for all visitors. The form view allows you to view information for a single visitor and add information for a new visitor.

5.1 Grid view

The grid view shows all visitor information for all visitors in a spreadsheet-like view. You can sort the information in the grid view by clicking on a column heading or choosing **Visitor** > **Sort by**. You can search for specific visitors on the grid view by choosing **Visitor** > **Lookup**.

5.1.1 How to use the grid view

The grid view lets you quickly review a group of visitor records. The records are displayed in a table with columns and rows.

Note: An efficient way to manage visitors is to open both the grid view and the form view. To edit a visitor record, find the record in the grid view and double-click that row. The record will then open in the form view.

In all EasyLobby grid views, networked 'dynamic updates' cause the the grid view to be refreshed automatically, so that you can see updates to visitor status in real time.
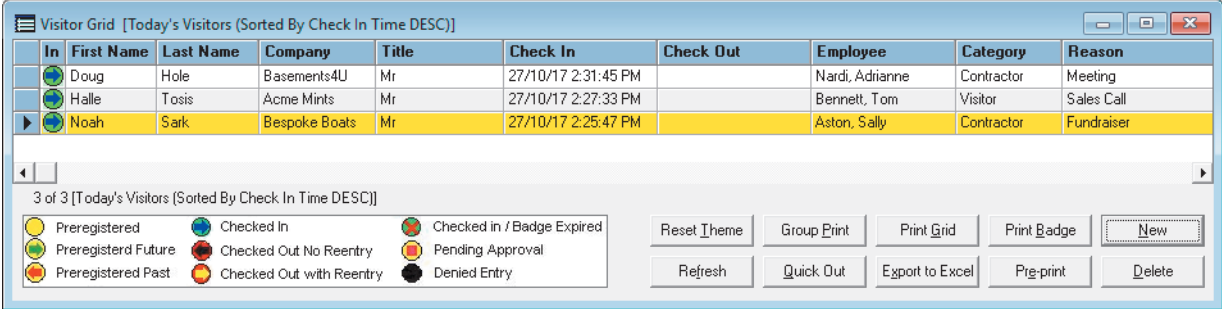
Next to each visitor name you will see an icon that indicates the current status of the visitor; Checked-In, Checked Out, Preregistered, etc. A key with all possible visitor statuses is available to help you learn the icons. The key can be hidden by clicking **Edit** > **Program Options** > **Defaults** tab > **Visitor** tab, and clearing the **Display Grid Legend** option (see *Section 3.4.2.2: Visitor tab*).

Icon	Description
	Indicates that the visitor has checked in but has not checked out.
	Indicates that the visitor has checked out.
	Indicates that the visitor's badge has expired and they have not checked out.
	Indicates that the visitor is preregistered.
	Indicates that the visitor was preregistered but never checked in.
	Indicates that the visitor is preregistered for a future date.
	Indicates that the visitor has checked out and is authorized for re-entry into the facility.
	Indicates that the visitor is pending approval for entry into the facility.
	Indicates the visitor is denied entry.

You can control the appearance and organization of the grid view in the following ways:

Action	Description
Resize the window	Drag the edge of the grid view window to make the window bigger or smaller.
Resize columns and rows	Drag the border after a column heading to make that column wider or narrower. Drag the border between any two rows to make all rows taller or shorter.
Change column order	You can make two columns switch places in the grid. To do this, drag and drop a column heading where you want it to be. The changes you make to the grid view are automatically saved. Click **Reset Theme** on the grid view to restore the default grid settings.
Sort column	Click the column heading to sort the grid on that field.
Hide a column	Right-click the column to hide or view a hidden column.

Any adjustments made to the grid will be saved for the next time you open the Visitor grid.

You can export the contents of the grid view to Microsoft Excel by clicking **Export to Excel**. This is especially helpful if you are planning to combine data from multiple sources for comparison.

5.2 Form view

The form view shows all the information for an individual visitor; name, company, title, contact information, visitor category, reason for visit, employee visited, badge information, the visitor photo and signature (if taken and captured), custom information being tracked, and check-in and check-out times. This view may also be used to enter new visitor information.

5.2.1 How to use the form view

The form view contains the following buttons:

- **Check in** allows you to check in the visitor.
- **Check out** allows you to check out the visitor.
- **Print Badge** prints a single badge on the badge printer.
- **View Badge** shows a preview of the badge to be printed.
- **Preregister** allows you to preregister a visitor.
- **Quick Out** allows you to check out any visitor with their Custom Id.
- **New** creates a new visitor record. The new visitor record will be completely blank, ready for you to populate.
- **Delete** deletes the visitor (if you have manager or administrator access).
- **Close** closes the visitor log view.
- **Save** saves information entered into a new visitor record.

The form view include the visitor's First Name, Last Name, Company, Title, Reason, Category, Employee, and Clearance. The tabs contain Contact Info, Photos, Badge, Signature, Entry Log, Vehicle, Notes, and User Defined tabs (if configured; see *Section 3.4.3: Customize Fields tab*). Right-click a field for editing options. You do not have to complete very field, but any that are marked with an asterisk, for example *** Company**, must be completed. These fields have been marked as 'required' by the EasyLobby administrator (see *Section 3.4.4: Visitor Fields tab*).

5.3   Find a visitor record

You can quickly find visitor records using these methods:

- Use a lookup to see a selection of visitors.
- Sort records by the desired criteria.
- Search with the Find window.

5.3.1   Look up a visitor record

To perform a lookup to see a selection of visitors, follow these steps:

1. With any visitor view active, click **Visitor** > **Lookup**. Click one of the following lookups on the menu. A check mark indicates which lookup is currently selected.

   - **All Visitors** displays all visitors.
   - **Today's Visitors** displays only visitors checked in with today's date. When you open EasyLobby, Today's Visitors is the default lookup for the grid and form views.
   - **Current Visitors** displays only visitors currently checked in.
   - **Today's Preregistered** displays all visitors who have been preregistered but have not checked in for a visit that is scheduled for today.
   - **Preregistered Visitors** displays all visitors who have been preregistered but have not checked in for a visit that is scheduled for any date.
   - **Expired Badges** displays visitors whose badges have expired but they have not checked out for the current day. An alert can be set to address visitors that have expired badges. See section *Section 3.4.7.4: Expired Badges Alert tab* for details.
   - **CheckedIn Visitors** displays visitors who are currently checked in. This view includes visitors that may have been checked in on a previous day, or have expired badges. The Current Visitors view will include only visitors with a checked in status that checked in today.
   - **Last Name** asks you for a last name to look up.
   - **Company** asks you for a company name to look up.
   - **Visit Date** asks you for start and end check-in dates to look up.
   - **In Station** asks you for a check-in location. The **Badge** tab of the form view shows the station.
   - **Reason** asks you for a reason or event to look up.
   - **Employee** asks you for an employee last name to look up.
   - **Category** asks you for the category to look up.
   - **Clearance** asks you for the clearance to look up.
   - **Expiration Date** asks you for the expiration date to look up.
   - **Custom Id** asks you for the custom Id of the visit to look up.
   - **License/Passport number** asks you for the license or passport number to look up.
   - **Title** asks you for the visitor's title to look up.
   - **Prox Card** asks you for the prox card number to look up.
   - **Id Number** asks you for the visitor's Id number to look up.

- **User Defined** asks you to define the full or partial text to look up and in which user defined fields.
- **Preregistered date** displays visitors who are preregistered for a particular date and location that you specify.
- **Employee's Preregistered** displays visitors who have been preregistered to visit the employee you select but have not checked in.
- **Department's Preregistered** displays visitors who have been preregistered to visit employees in the department you select but have not checked in.
- **Company's Preregistered** displays visitors who have been preregistered to visit employees in the company you select but have not checked in.

2. If you are asked for text to look up, select an item from the list on the right or type in the box on the left. If there is no list to the right, click **Load** to load the list. Check **Always Load** if you would like the list to always load when you do the lookup. If the list is very long, it may take a while to load. If you find this is the case, clear the **Always Load** option.

   The search box on the left accepts wildcard characters, where * matches any number of characters and ? matches any single character. This means you can type a pattern such as S* to look up all visitors whose last name begins with the letter S, followed by any number of characters. Typing ???der, where each ? represents exactly one character, would match visitors called Snider and Reader.
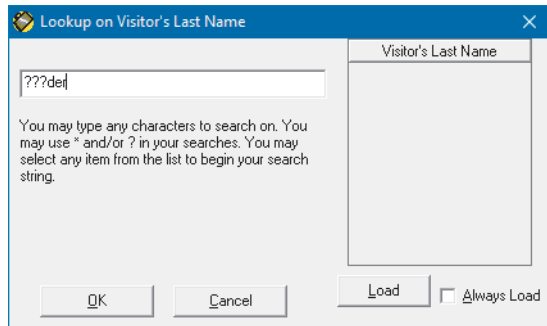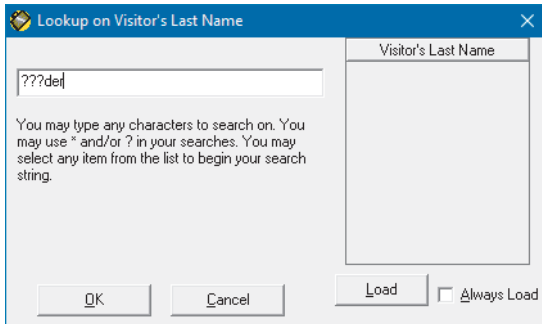
   If you are asked for the start and end date, type dates or click the arrow to select dates using a calendar. The start date must be before or the same as the end date.

3. Click **OK**. The visitor views shows only the visitors that match your lookup. The message area at the bottom of each view shows how many visitors match your lookup.

Some lookups have quick key shortcuts available; see *Section A.2: Shortcut keys*.

5.3.2 Find a specific visitor

To find a visitor, click **Visitor** > **Lookup** > **Last name**.
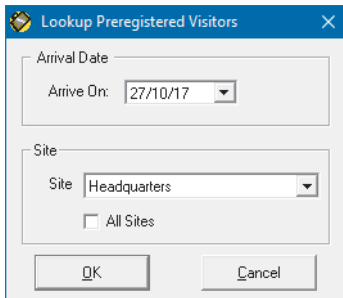
You can select any visitor last name from the list. If a list is not present, click **Load** to load the list of visitors. You can check **Always Load** if you would like the list to always load when you do the lookup. If the list is very long, it may take a while to load. If you find this is the case, clear the **Always Load** option. Remember that the search box accepts wildcard characters; see *Section 5.3.1: Look up a visitor record*.

5.3.3 Find a preregistered visitor

There are many lookups for preregistered visitors; today's preregistered visitors, all preregistered visitors, by date, by employee, by department, and by company. The following example shows how to find all preregistered visitors and preregistered visitors for a particular date.

1. Click **Visitor** > **Lookup** > **Preregistered Visitors**. The list of all preregistered visitors is displayed in the grid view and the form view.

2. To find preregistered visitors for a particular date, click **Visitor** > **Lookup** > **Preregistered date**. You will see a window that allows you to select the arrival date and location for preregistered visitors.

3. Select the arrival date for which you want to see the preregistered visitors.

4. Select the site for which you want to see the preregistered visitors. You can select either a single site or you can check **All Sites** to see visitors for all locations.

5. Click **OK**. The visitor views show only the preregistered visitors you selected.

5.3.4 Find visitors by reason

To do a lookup of visitors based on reason (see *Section 3.9: Reasons for a visit*) follow these steps:

1. With any visitor view active, click **Visitor** > **Lookup** > **Reason**. A check mark indicates which lookup is currently selected.
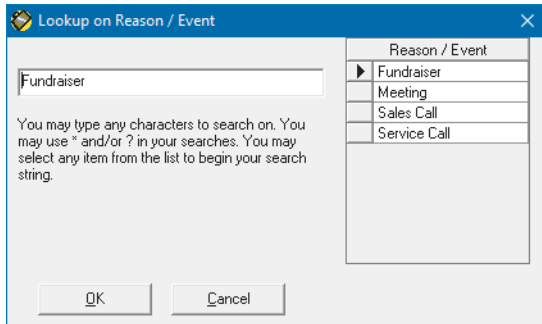
2. If you are asked for text to look up, select an item from the list on the right or type in the box on the left. Remember that the search box accepts wildcard characters; see *Section 5.3.1: Look up a visitor record*.

3. Click **OK**. The visitor views will show only the visitors that match your lookup. The message area at the bottom of each view will show how many visitors match your lookup.

5.3.5 Sort visitor records

You can sort the current lookup of the visitor records within the grid by:

Check In Time	Category	Check Out Time
Clearance	Last Name	Custom Id
First Name	Valid From	Company
Title	Employee	Reason
Valid to	In Station	Out Station

1. With any visitor view active, click **Visitor** > **Sort by** or click the header of the column you wish to sort by.

2. Click the desired sort type on the menu. A check mark indicates which sort is currently selected. The visitors shown in the visitor views are listed in the order you selected.
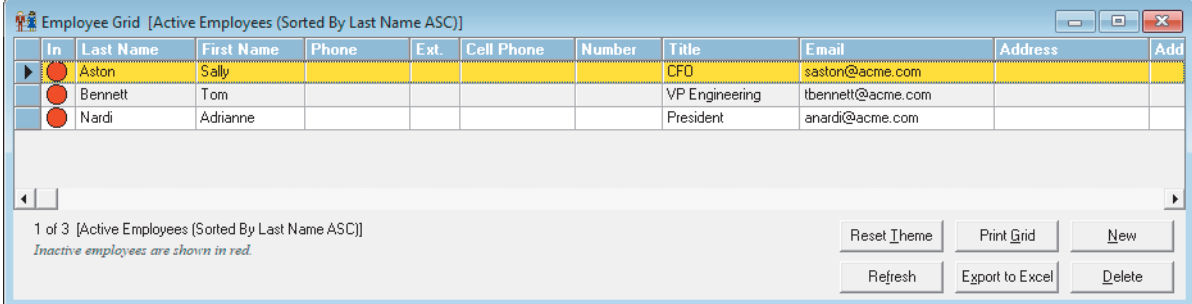
Note: The Sort by function will sort the currently active list of visitor records. For example, if you had previously looked up all preregistered visitors, the sort by last name would sort the list of preregistered visitors by last name. To sort all visitors by last name, do a lookup of all visitors and then sort by last name.

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5.4 The employee grid view

The **Employee Grid** view shows all information for all employees in a spreadsheet-like view. You can sort the information in the grid view by clicking **Employee** > **Sort By**. You can search for specific employees clicking **Employee** > **Lookup**.

To open the employee grid view, use either of these methods:

- Click ![icon] (Employee grid view) in the toolbar.
- Click **Employee** > **Grid View**.

5.5   The employee form view

The employee form view shows all information for a single employee. Employee name and company contact information is located at the top of the employee view, while personal information is displayed on the bottom half of the window.

EasyLobby includes an employee photo and up to five photos associated with that employee. The photos are located on tabs in the employee view. Depending on your security level, some parts of the employee view may not be accessible to you. Photos are always available for all security levels.

To open the employee form view, use any of these methods:

- Click 👬 (Employee Form view) in the toolbar.
- Click **Employee** > **Form View**.
- Double-click the **Employee** field in a single-visitor view.

5.5.1   Find an employee

The **Employee** > **Lookup** menu functions similarly to the lookup menu for visitors. These grid views can be especially helpful when you have a mixed use for your employees, such as multiple companies in a multi-tenant building or if you are a hospital and using EasyLobby to manage visitors for patients.

A check mark indicates which lookup is currently selected. The options in this menu are:

- **All Employees** displays all employees.
- **Active Employees** displays only active employees.
- **Inactive Employees** displays only inactive employees.
- **Last name** asks you for a specific employee's last name.
- **Department** asks for a specific department.
- **Title** asks for a specific title.
- **Site** asks you to choose a specific site.
- **Company** asks you to choose a specific company.
- **Category** asks you to choose a specific category.
- **Number** asks for a specific employee number.
- **User Defined** asks you to define the full or partial text to look up and which user defined fields.
- **Auto Fields** asks you to define the full or partial text to look up and which user auto (vehicle) fields.

The **Employee** > **Sort by** menu functions similarly to the **Sort by** menu for visitors. A check mark indicates which sort is currently selected. You can also sort the employee grid by selecting the header of the column you wish to sort by. The options in this menu are:

- **Last name** alphabetizes records by the last name of the employee.
- **First name** alphabetizes records by the first name of the employee.
- **Title** sorts employees by their title.
- **Department** sorts employees by their department.
- **Employee Number** sorts employees by their employee number.
- **Company** sorts employees by their company.
- **Site** sorts employees by their site.
- **Category** sorts employees by their category.

5.5.2 Add an employee

Note: Only EasyLobby administrators and managers can add new employees.

A new employee can be added by importing employee records, adding them manually, or scanning their information. New employees cannot be added by typing in a visitor or package view. To add a new employee, follow these steps.

1. Click **File** > **Employee** or double-click an employee record in the grid view.
2. Click **New**.
3. Type the first and last name of the employee.
4. Type employee data as required. The employee email field must have a valid email address for visitor email notification and/or automatic package notification to work.

5.5.3 Add an employee via scanning

This is helpful if you have a number of employee records to create and do not plan to use the Employee Import utility (see *Section 3.7.2: Import employee data*). To add a new employee by scanning their information, follow these steps:

1. Click **File** > **Employee** or double-click an employee record in the grid view.
2. Click **Employee** > **Scan to Create Employee**. A check mark is displayed in front of **Scan to Create Employee**.
3. Scan the employee's business card or driver's license. The information from the card or license, including the photo (if capturing a photo) is included in the employee record.
4. Type employee data as required. The employee email field must have a valid email address for visitor email notification and/or automatic package notification to work.

Employee photos can be taken at any time. Photos can also be loaded from disk or the clipboard. Some visitor badge templates print a photo of the employee on the badge and many package labels print the employee photo.
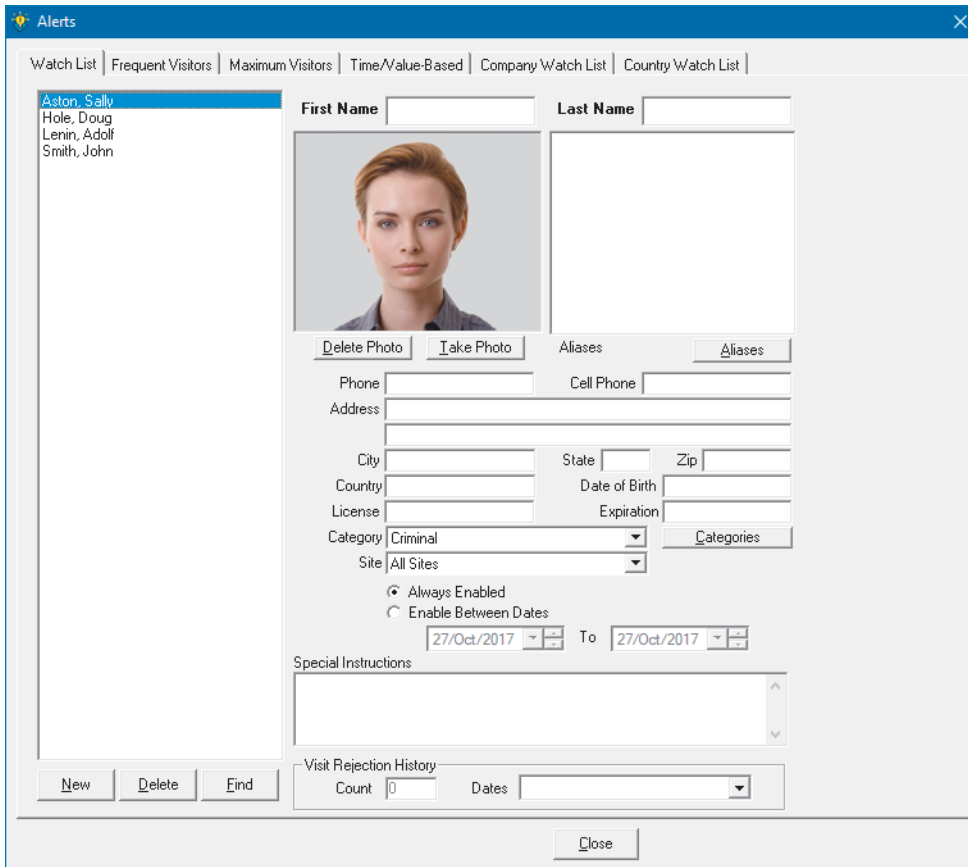
5.5.4 Mark an employee as inactive

To mark an employee as inactive, find the record for the employee and check the **Inactive** option on the **Employee Log** window. Inactive employees are shown in red on the employee grid view. Employees can also be marked as Inactive via the Employee Import tool (see *Section 3.7.2: Import employee data*).

5.5.5   Add an employee to the watch list

To add an employee to the watch list:

1. Find the employee to add to the watch list, either from the employee form or grid views, or from a visitor record (double-click the employee field to bring up the employee form view).

2. Click **Employee** > **Add to Watch List**.

3. The watch list is displayed with the current employee record.

4. Complete or edit any applicable information, and add special instructions.

5.5.6   Delete an employee

To delete an employee record, find the record for the employee and click **Delete** on the **Employee** window. You cannot delete an employee record if there are visitor records for that employee. When an employee who has had visitors leaves the company, you can one of the following:

- Mark the employee as inactive.

- Choose to archive the employee record and all the visitors for that employee. This file can be kept with the employee's permanent records.

- Lookup all the visitors for that employee, then delete the visitors or assign them to a different employee. Once all the visitors that reference that employee are removed, you can then delete the employee.

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Visitor management

The typical steps for logging a visitor are as follows:

1. Capture the visitor's information by:
   - Manually typing.
   - Scanning a business card.
   - Reading a driver's license.
2. Capture the visitor's photo and/or signature (optional).
3. Check in a visitor and print their badge.
4. Notify the host employee.
5. Check out a visitor when they leave

Several shortcuts are available for performing these common tasks:

- **F2** adds a new visitor record (see *Section 6.1: Add a new visitor*).
- **F3** adds a returning visitor (see *Section 6.3: Add a returning visitor*).
- **F4** adds another visitor from the same company (see *Section 6.4: Add a visitor from the same company*)
- **F6** checks in a visitor (see *Section 6.14: Check in a visitor*).

Note: When you add a new visitor, the login name of the current user is added to the operator field.

6.1 Add a new visitor

To manually add a new visitor who has never visited before, open a new visitor view using any of these methods:

- Click ![icon] (New Visitor) in the toolbar.
- Click **New** in the visitor or grid view.
- Click **Visitor** > **New Visitor**.
- Right-click the background of any visitor view. On the pop-up menu, click **New Visitor**.
- Press **Alt+N**.
- Press **F2** to add a record with a single keystroke.

All the fields in the visitor log are blank in the new record:

1. Type the visitor's first name, last name, title, and company.
2. Select the reason for the visit on the **Reason** drop-down.
3. Select the type of visitor on the **Category** drop-down.
4. Select the name of the host employee on the **Employee** drop-down.
5. Enter any additional information required by your company's procedures.
6. To save the information on a visitor record before checking in/printing a badge, click **Save**.

6.2 Copy a visitor

If several visitors share much of the same information, you can quickly use one visitor's information as the basis for creating a new visitor.

1. Use the grid view to find and select a row with the visitor's name. Other ways to find visitors are described in *Section 5.3: Find a visitor record*.
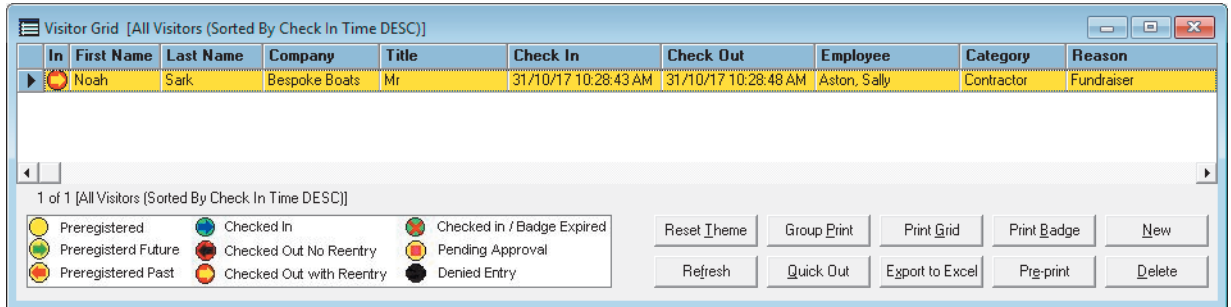
2. Click **Visitor** > **Copy Visitor**. The check in and out information and the fields on the **Badge** tab in the form view are blank in the new record; all existing fields are the same as the original visitor. Enter details of the new visitor. Make sure to check through the visitor form tabs to update all the applicable information for the new visitor.
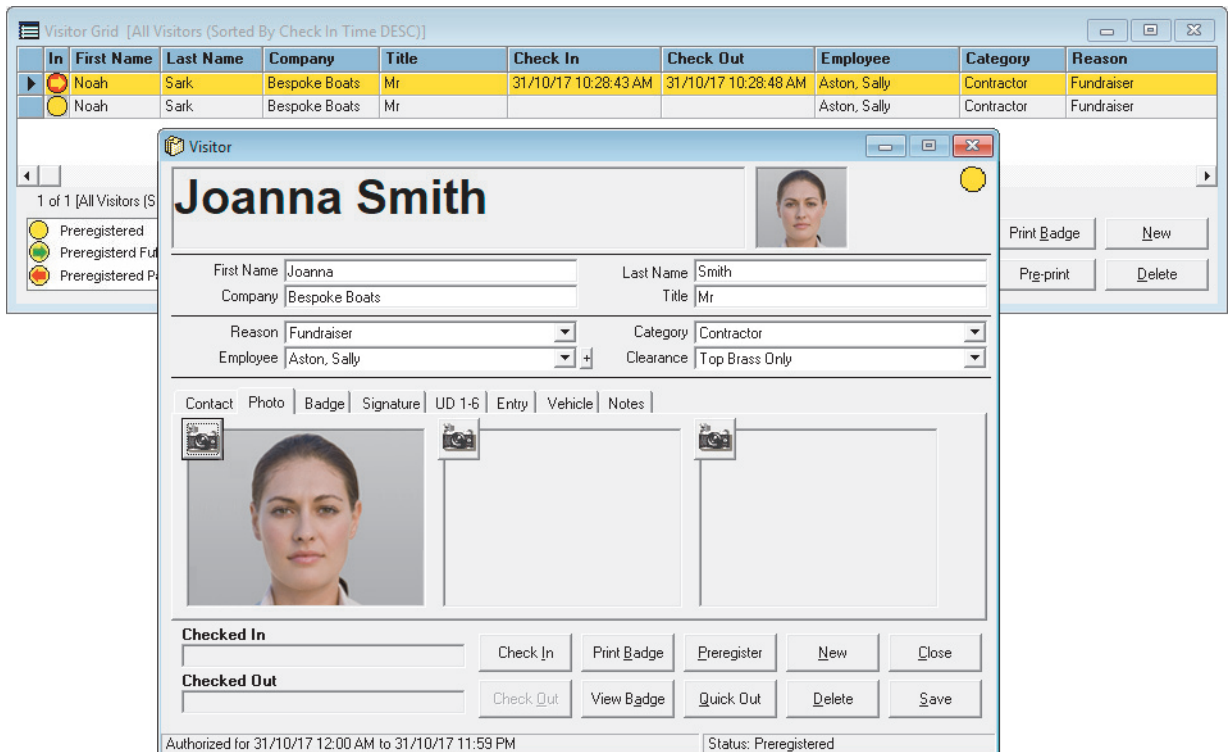
3. Click **Save**, then **Close**.

6.3   Add a returning visitor

1. Open a returning visitor view with any of these methods:
    - Click ▓ (Returning Visitor) in the toolbar.
    - Click **Visitor** > **Returning Visitor**.
    - Right-click the background of any visitor view. On the pop-up menu, click **Returning Visitor**.
    - Press **F3** to add a record with a single keystroke.

2. Type some visitor information and click **Find**.
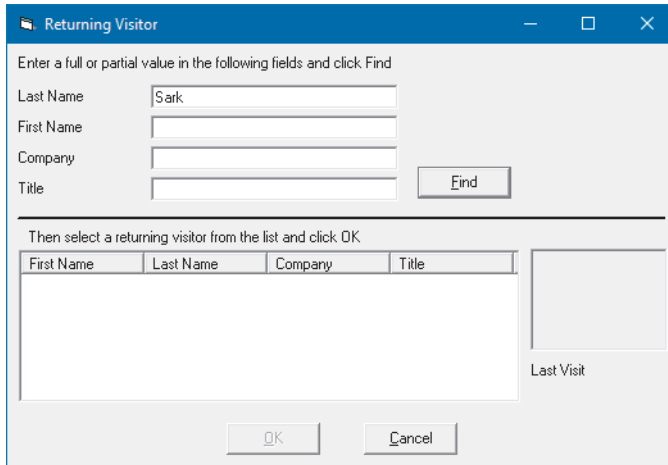
3. Visitors matching the information are displayed in the list on the bottom of the window, as well as their photos, if available, and their last visit date. Select the correct visitor and click **OK**.
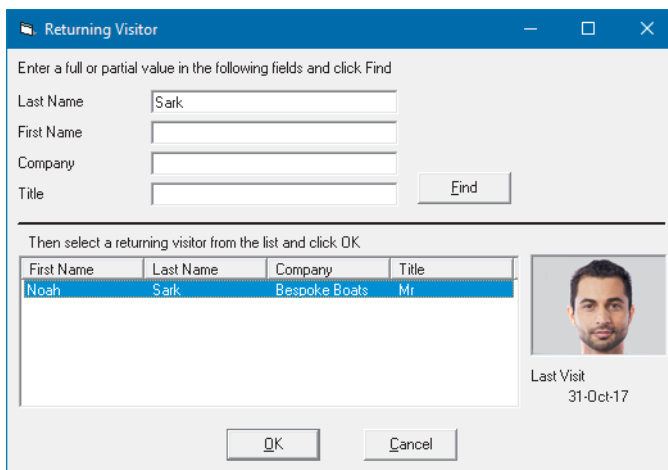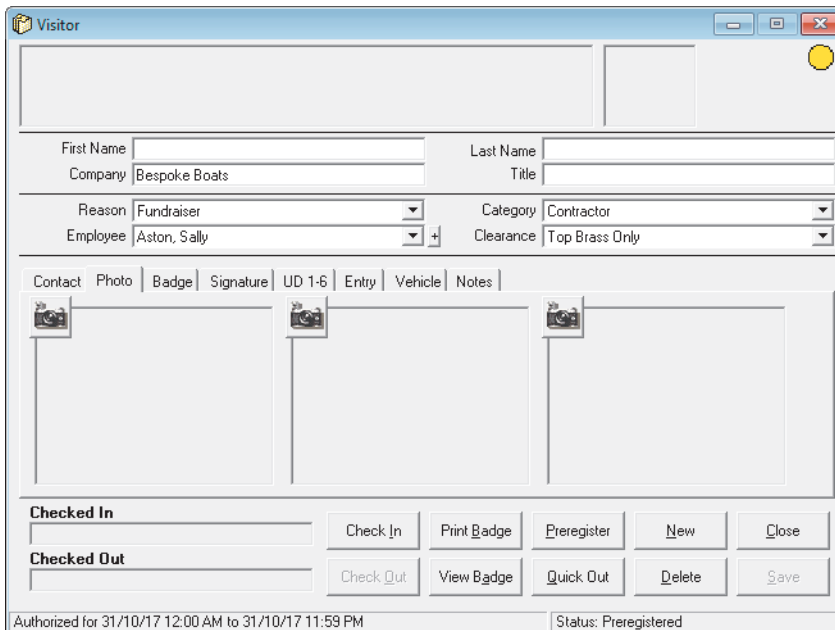
4. A new visit record will be created for the visitor. Type or change any information required by your company's procedures and process as normal.

Note: By default a new visit record will be created for each time the visitor is on site.

6.4   Add a visitor from the same company

When a group of visitors from the same company arrives:

1. Check in the first person using the new visitor (see *Section 6.1: Add a new visitor*) or returning visitor (see *Section 6.3: Add a returning visitor*) forms.

2. Once you have checked in the first visitor from the same company, open a visitor form using any of these methods:

   - Click 👫 (Visitor from Same Company) in the toolbar.

   - Click **Visitor** > **Visitor from Same Company**.

   - Right-click the background of any visitor view. On the pop-up menu, click **Visitor from Same Company**.

   - Press **F4** to add a record with a single keystroke.

3. The company name, address, contact information, and user-defined fields are copied to the new record. Type the visitor's first name, last name, and title.

4. Enter any additional information required by your company's procedures.

5. Repeat this process for all visitors from the same company.

6.5 Add a visit by an employee

This may be used when an employee visits a location where they do not normally work.

To add a visit by an employee:

1. Click **Visitor** > **Visit by an employee**. Type the employee's name and click **Find**.

2. Employees matching the information are displayed in the list at the bottom of the window. A photo and the employee number is displayed, if available. Select the employee and click **OK**.

3. A visitor record is created for the employee. Type or change any information required by your company's procedures and process as normal.

6.6   Add a new visitor by scanning a business card

To scan a business card with the ScanShell 1000 or SnapShell R2:

1. Place the business card in the scanner. The information from the card is placed automatically into the visitor view.

2. Enter any additional information required by your company's procedures.

Note: You should check the details imported from the business card, as business cards' unique designs make it difficult to ensure that data is mapped to the appropriate fields.

6.7   Add a new visitor by reading a driver's license

To read a driver's license:

1. Insert the visitor's driver's license into the scanning device as instructed in the device's manual. For a magnetic stripe card, swipe the card through the reader. The information from the license is automatically placed into the visitor view. The picture from the visitor's license is automatically placed into the picture field on the **Photo** tab of the visitor form view.

2. Select the type of visitor on the **Category** drop-down.

3. Select the reason for the visit on the **Reason** drop-down.

4. Select the name of the host employee on the **Employee** drop-down.

5. Enter any additional information required by your company's procedures.

6.8   Merge card/Id data

This function allows you to scan multiple data sources into one record, for example a barcode scan and another scan from a card containing a photo. To merge the data from a business card or driver's license to an existing visitor's record:

1. Either scan a business card or driver's license to create a visitor record or locate the desired visitor's record.

2. Click **Merge data** on the toolbar or click **Visitor** > **Merge Card/Id data**. The **Merge data** button appears to the top right side of the visitor record, indicating that the record is enabled to merge with the information from the next business card/driver's license scan.

3. Scan the business card/driver's license. The visitor's record is updated with the information from the scan that was not previously on the record. For instance, if you had scanned a visitor's driver's license and merged the data from their business card scan, the company, title, phone, and fax numbers would appear on the record after the scan.

6.9 Business card or driver's license scan matches preregistered visitor

If the **Enable pre-authorized visitor match on business card or license scan** security option is selected (see *Section 3.4.5.3: Preregistration Match tab*), when you scan a business card or driver's license and the last name matches a visitor who is preregistered, you are prompted that the visitor is on the list. The **Preregistered Visitor Match** window is displayed, where you may select the preregistered visitor, create a new visitor, or cancel the check-in.
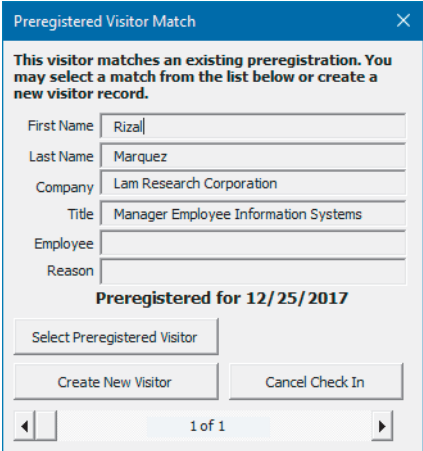
Note: The visitor's information will be updated with the information to match the business card or driver's license.

6.9.1 Visitor is not preregistered

If the **Warn if visitor is not pre-authorized** security option is selected (see *Section 3.4.5.3: Preregistration Match tab*), when you scan a business card or driver's license and the visitor is not preregistered, a prompt is displayed. The **No Preregistered Visitor Match** window is displayed, where you may select to create a new visitor, or cancel the check-in. This setting is helpful if you request that visitors are preregistered, but may still allow a walk-in visitor..
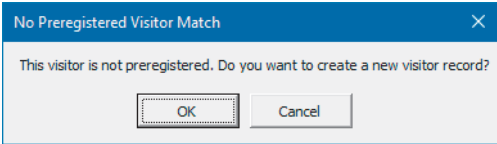
6.10 Capture a visitor's photo

EasyLobby can capture a photo of your visitor and store it in the visitor log, print the photo on the badge, and show the photo on a visitor report. A visitor photo can be loaded from and/or saved to file, captured from a camera or any input device such as a scanner, or captured from a card reader. Multiple photos allow you to take a picture of your visitor and also capture the image of their business card or driver's license with the scanning device.

6.10.1   Capture a photo from a camera

1. On the **Visitor** form view window, click the **Photo** tab.

2. Click one of the [icon] buttons.

3. If you see a **Video Source** window, select the required camera.
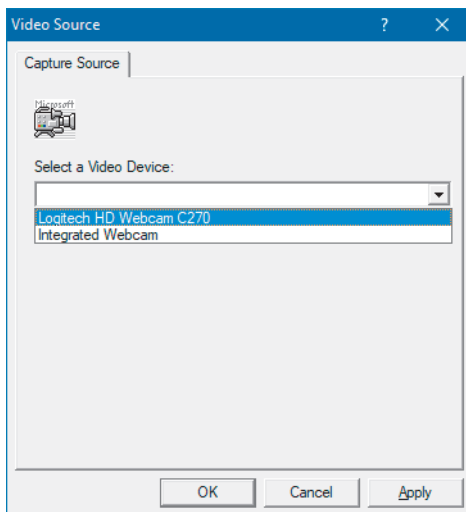
4. The **Photo Capture** window appears.
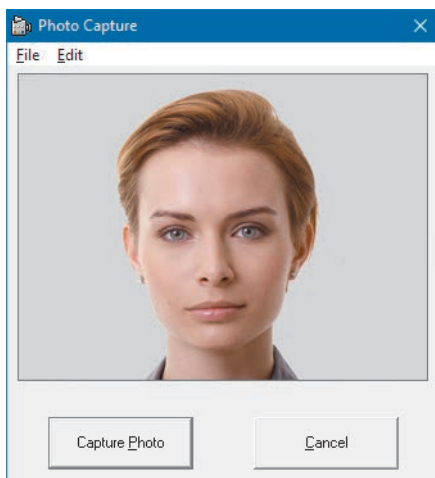
5. Click **Capture Photo** to take the photo.

6.10.2 Load a picture from file

1. Follow the steps in *Section 6.10.1: Capture a photo from a camera* until the **Photo Capture** window is displayed.
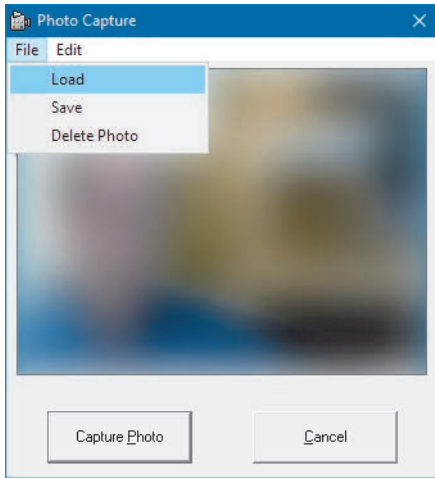
2. In the **Photo Capture** window, click **File** > **Load**.
3. Locate the required image file and click **Open**.

6.10.3 Scan a photo from a driver's license or passport

1. Follow the steps in *Section 6.10.1: Capture a photo from a camera* until the **Photo Capture** window is displayed.
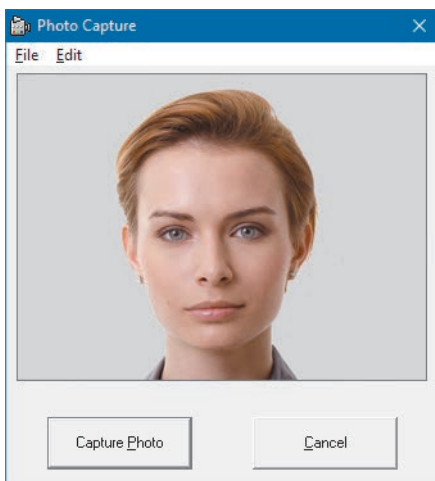
2. Right-click and select **Scan from CardScan** or **Scan from ScanShell**.
3. Place the business card or driver's license in the scanner and click **OK**. The card is scanned and its image is displayed as the photo.
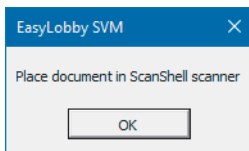
Note: If you use an ID scanner to capture the visitor's information to create a new visitor record, the photo can be captured at the same time. See *Section 6.7: Add a new visitor by reading a driver's license*.

6.10.4 Delete a previously loaded photo

1. On the **Visitor Log** form view, click 📷 on a previously loaded photo.
2. In the **Photo Capture** window, click **File** > **Delete Photo**.
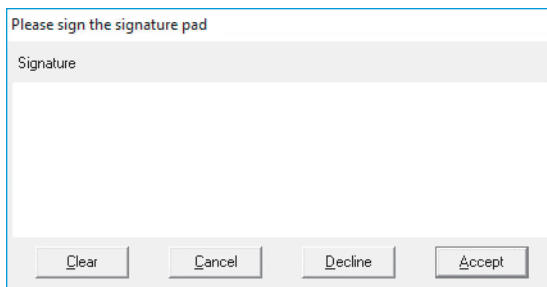
6.10.5 Save a previously loaded photo

1. On the **Visitor Log** form view, click 📷 on a previously loaded photo.
2. In the **Photo Capture** window, click **File** > **Save**.

6.11 Capture a visitor's signature

EasyLobby can capture the signatures of your visitors. Visitor signatures are captured with a Topaz signature capture device. This allows the visitor to confirm that they have read particular terms and conditions, site rules, non-disclosure agreement, etc. before entering the site.

1. On the visitor form view, click the **Signature** tab.
2. Click **Get Signature**.

3. Ask the visitor to write their signature on the Topaz device, using the special pen attached to the device. As they do this, their signature is displayed in the **Signature Acquisition** window.
4. Click **Accept** and the signature will appear on the visitor record.
5. On the **Signature Type** drop-down, select the document type for which the visitor has signed.

6.12 Capture custom information for a visitor

EasyLobby allows up to 24 fields of additional visitor information that is specific to your company's needs (for example, license plate number, parking lot). This information can be recorded on the Visitor form. Your EasyLobby system administrator or manager can change the names of these user-defined fields. User-defined fields should be set up prior to the visitor's check-in. If custom information needs to be captured at the time of the visit, you can use the Comments field.

1. On the visitor form view, click the **UD** (user defined) tab. The custom information tab(s) are to the right of the **Signature** tab. They may not be named **UD** since they are configured by the EasyLobby system administrator. There can be up to four user-defined tabs. Ask your EasyLobby system administrator or manager if you are uncertain about the custom fields.
2. Enter the desired information.

6.13 Watch list checks

There may be visitors that are not allowed to enter your building. EasyLobby has different ways to check if a visitor is to be accepted. The watch list allows you to keep a list of people who are not allowed into the building, including their name, photo, contact information, and special instructions. The list also displays the number of times the person has been denied entry and the corresponding dates. Each employee has up to five associated photos. These photos can be used to prevent access for restricted visitors associated with that employee, to show relationships such as family or guardian, or to maintain an awareness of special relationships that employees may have to the visitor.

Only managers and administrators can view the watch list.

1. Click **Edit** > **Alerts**.
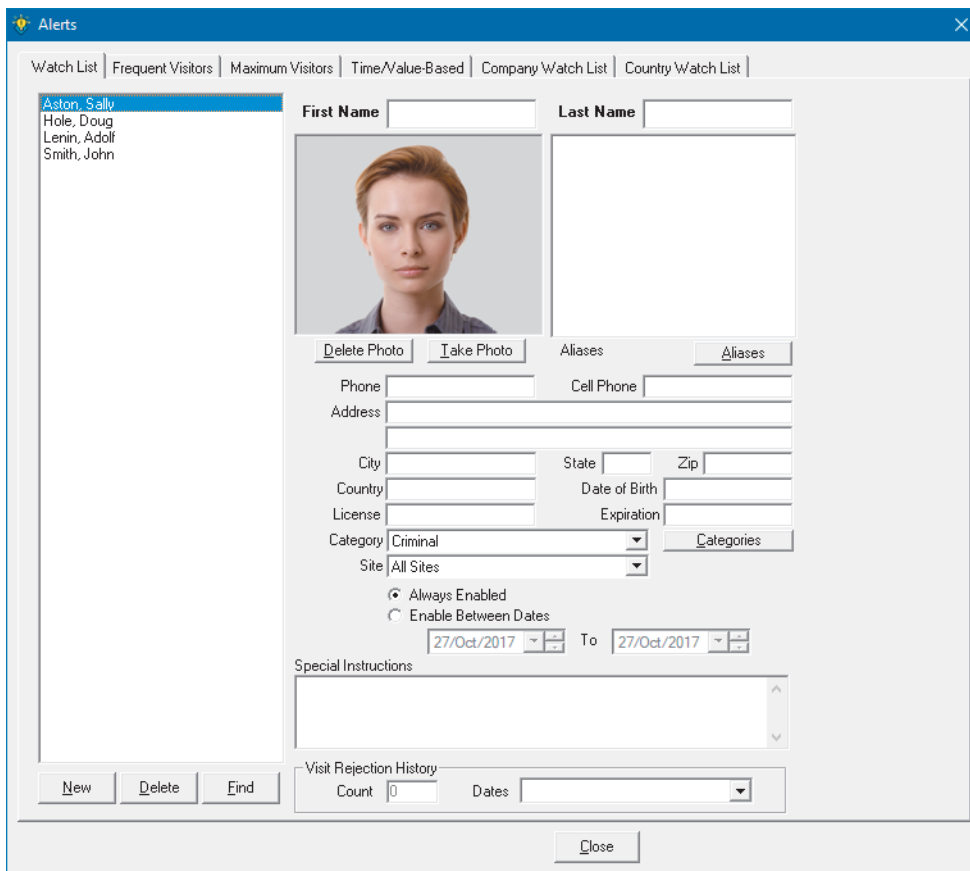
2. On the **Watch List** tab, click the name on the left to view information about the person.
3. Alternatively, on the menu, click **File** > **Watch List Thumbs**. Click a photo to show details of the person.
4. Alternatively, on the menu, click **File** > **Photo Thumbs**. Click a photo to zoom it to full screen.

These photos may be of people with a special relation to the company, of whom receptionists need to be aware. Examples are board members who may require special attention, or people who are a security risk to the corporation. Lobby staff should become familiar with the complete list. Administrators can add a photo by copying it into the folder C:\Program Files (x86)\EasyLobby\EasyLobby SVM 10.0\Thumbs. If subfolders are created inside the thumbs folder, a caption with the subfolder name is added to each picture.

6.14 Check in a visitor

After you have entered information about a visitor or found the record for a preregistered visitor, you may check in the visitor. Checking in a visitor enters the current time and date in the visitor log.

You can check in a visitor using any of these methods:

- Click **Check In** in your current visitor log view.
- On the menu, click **Visitor** > **Check In**.
- Right-click the background of any visitor view. On the pop-up menu, click **Check In**.
- Click ✓ᴵᴺ **Check In** on the toolbar.
- Press **F6**.
- Click **Print Badge** in your current visitor log view. Printing a badge for a visitor automatically checks in that visitor.

The **Check In** button enters the current date and time in this format:

Checked In

Tuesday, October 31, 2017 at 11:45 AM

When you check in a visitor, the default check-in location for your computer is added to the **InStation** field in the **Badge** tab of the form view, unless you or the person who preregistered this visitor typed a different location.

6.14.1 Visitor already checked in prompt

If the **On check in, prompt if visitor is already checked in** security option is selected (see *Section 3.4.5.1: Check In tab*), when you check in a visitor and the first name, last name, and company match a visitor who is already checked in, you are prompted that the visitor is already checked in. Usually this indicates that the person did not check out when they left from their previous visit. The **Previous Check In Match** window is displayed, where you may check out the previous check-in, and/or cancel or proceed with the check-in.

6.14.2 Visitor matches an entry on the access control list prompt

If the **On check in, prompt if name matches an entry in the watch list** security option is selected (see *Section 3.4.5.1: Check In tab*), when you check in a visitor and the name matches a visitor who is on the watch list (i.e. an unwelcome visitor or VIP) you are prompted that the visitor is on the watch list. The **Watch List Match** window is displayed, where you may cancel or proceed with the check-in.
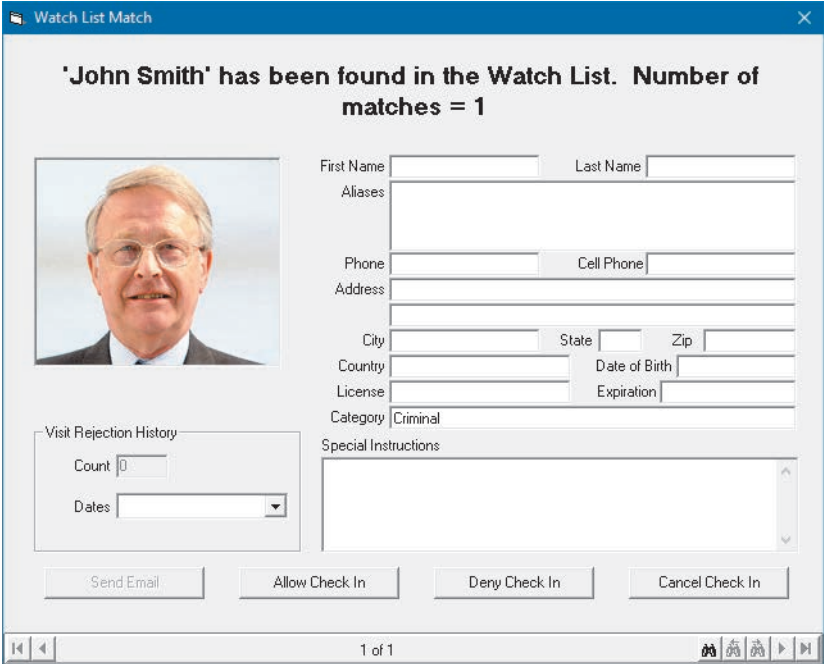
6.14.3 Visitor alert prompt

If you have an alert set up, and a visitor satisfies the conditions of the alert, the alert will be displayed when the visitor checks in.
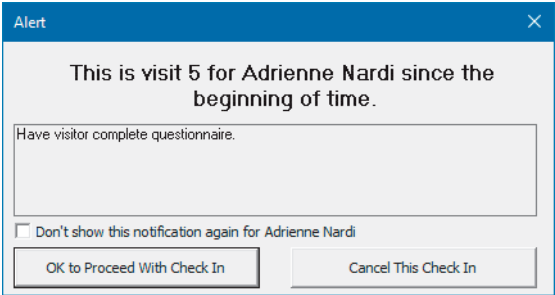
The alert tells you the number of visits and the time frame, the instructions, and the **Don't show this notification**... check box (if specified). You can either check in the visitor or cancel the check-in depending on the instructions in the alert.

Note: Once the alert notification is turned off, it will never show again for that visitor.

6.14.4 Multi-day check in and check out via barcode scan

If the **Enable multiple check ins within authorization period** option is enabled (see *Section 3.4.5.1: Check In tab*) you can check in and check out a visitor via a barcode scan of their badge for the time the badge is valid. This feature can be used when you have a visitor that is on-site for more than one day, for example a contractor, and you would like to issue them a single badge rather than printing a new badge each day, or if you expect your visitor to leave the building and return later within the same visit (for example, leaving for lunch and then returning in the afternoon).

You can also set **Allow sequential check in without intervening check out**, if desired. To use the multi-day check-in and check-out feature:

1. Capture the visitor's information on their first day and set the **Valid From** and **Valid To** dates and times in the **Badge** tab on the form view.

2. Print out a badge for the visitor that shows the barcode of the Custom Id.

3. When the visitor leaves or returns, scan the barcode on the badge with the barcode scanner. The visitor is checked in or checked out automatically.

   If you do not have a hand-held barcode scanner, press **F12** and manually type the visitor's Custom Id from their badge to check them in or check them out.

Note: There is one check-in date and time for each visitor record. When someone visits multiple times (other than the multi-day check-in/out), you create a new record for that person for each visit.

6.14.5 Print a badge

EasyLobby can print a variety of badge layouts and can use different printers to print single badges and groups of badges. To change the printer or badge used, contact your EasyLobby system administrator or manager. More details about designing and assigning badge types is included in *Chapter 11: Print badges*.

1. Select the visitor record for which you want to print a badge.

2. Print a badge for this visitor using any of the following methods:
   - Click ☐ **Print Badge** in the toolbar.
   - Click **Visitor** > **Print Badge**.
   - Right-click the background of any visitor view. On the pop-up menu, click **Print Badge**.
   - Click **Print Badge** in the visitor view window.
   - Press **F8**.

If EasyLobby is set up to use a label printer when printing single badges, the badge prints immediately. If EasyLobby is set up to use a laser printer or an ink-jet printer, the **Print Options** window is displayed to allow you to select the position of the first badge on the page or to change the badge printer.

Note: If you need to print a group of badges or want details about using the **Print Options** window, see *Section 6.17: Manage a group of visitors*.

6.14.6 Send email notification of a visit to an employee

If you are using automatic email notification of visitors, after you check in/print a badge for the visitor your email program will open with a message to the host employee. You can modify this message if you wish and click **Send** to send the message.

If you are not using automatic email notification of visitors, when a visitor arrives you can send an email to notify the host employee by following these steps:

1. Create the visitor record as you would normally. You should print the badge before you notify the employee by email; that way the check-in time and date and location is automatically entered.

2. Click ▨ in the toolbar or press **F11**. Your email program opens with a message to the host employee. This message can be modified.

3. Click **Send** to send the message.

Note: If the email message does not appear in your email program, contact your EasyLobby system administrator or manager. Note that you must have the SMTP configured in order for email alerts to work.

6.15 Check out a visitor

When a visitor leaves, you can check out that visitor. The current time and date is automatically recorded in the visitor log. You can check out a visitor using any of these methods:

- Click **Check Out** in your current visitor log view. This enters the current date and time:

  Checked Out
  Tuesday, October 31, 2017 at 4:40 PM

- Click **Visitor** > **Check Out**.
- Right-click the background of any visitor view. On the pop-up menu, click **Check Out**.
- Click (Check Out) on the toolbar.
- Press **F7**.
- If required by your visitor procedure, collect the badge from the visitor.

Visitors may also be checked out by scanning the bar code on their badge, or their smart card, prox card, driver's license, or ID if EasyLobby is configured to perform in this manner. These functions are discussed below.

When you check out a visitor, the default checkout location for your computer is added in the **Out Location** field in the **Badge** tab of the form view (unless you typed a different location). To change this default location, contact your EasyLobby system administrator or manager.

Note: There is one check-out date and time for each visitor record. When someone visits multiple times, a new record is created for that person for each visit. If you need to enter a checkout date and time other than the current date and time, contact your EasyLobby system administrator or manager.

6.15.1 Quick out

The check-out process can be streamlined by using Quick Out. Quick Out allows you to enter the Custom Id for the visitor to automatically check the person out, without having to find their visit first. Each visitor is automatically assigned a Custom Id.

To use Quick Out, make sure you are using a badge that prints the Custom Id. To change the badge template, contact your EasyLobby system administrator or manager.

To check out a visitor with Quick Out:

1. When the visitor returns from their visit, click **Quick Out** or press **F12**.
2. Type the Custom Id number and press **Enter**. The visitor record is automatically looked up and checked out without disturbing your current work.

6.15.2 Barcode scanner checkout

To automate the check-out process, you can add a barcode scanner to your EasyLobby system. Select a badge template that prints the barcode of the Custom Id. When a visitor returns from their visit, scan in the barcode on the badge and that visitor is checked out without disturbing your current work.

Note: The barcode scanner must be configured before it will scan barcodes. Scan the necessary barcodes in the scanner's user manual to set a preamble string of F12, and Code 128. For additional information, refer to the Devices folder on the EasyLobby DVD.

6.15.3 Check out with a driver's license

If EasyLobby is enabled to allow check-out via a driver's license, you may scan the visitor's driver's license when they are ready to leave to check them out.

Note: To use this feature, the visitor must have initially been checked in using a driver's license read.

6.15.4 Check out all visitors

The Check Out All feature allows you to check out all visitors that are currently checked in. You may want to use this feature at the end of the day if your company has a policy that everyone must be checked out.

1. Click **Visitor** > **Check Out All**...
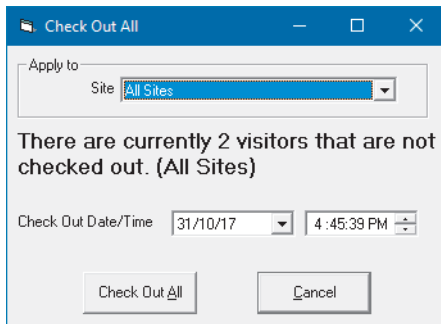
2. The **Check Out All** window tells you how many visitors are not currently checked out for all sites or a specified site. The default check-out date and time are the current date and time; you may change these to the desired time.

3. Click **Check Out All** to proceed with the check-out.
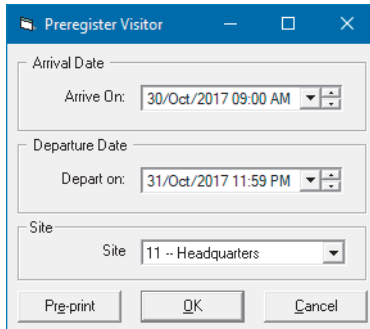
6.15.5 Delete a visitor record

Administrators and managers can delete any visitor record by clicking **Delete** in a visitor view. The associated event and employee are not deleted when you delete a visitor record.

6.16 Preregister a visitor

Preregistering expected visitors speeds up the visitor check-in process. When the visitor arrives their information is already entered into EasyLobby and a badge is ready to print. The badge may also be preprinted before their arrival. To preregister visitors using eAdvance, see *EasyLobby eAdvance 10.4 Installation and Administration Guide* (PLT-03263).

1. Create a new visitor and enter the expected visitor's information. Do not check in or print a badge for the visitor.

2. On the new visitor form, click **Pre-register**.

3. Use the down arrow to select the date and time of arrival and departure and the check-in location, if different from the default entries.
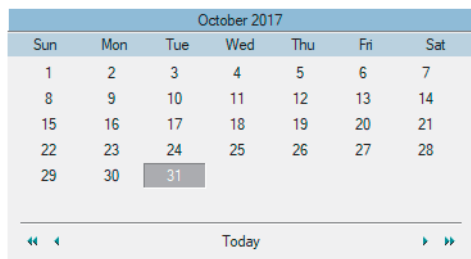
Note: The date of arrival and check-in location or arrival fields are updated on the **Badge** tab in the visitor log form view.

4. Click **OK**. In the status area, the visitor record displays that the visitor is authorized, including the dates.

Authorized for 03/11/17 9:00 AM to 03/11/17 12:00 PM   Status: Preregistered in the future

5. You do not need to click **Check In** or **Print Badge** at this time. When the visitor arrives, perform a lookup on preregistered visitors, locate the visitor and print a badge. This will automatically check in the visitor.

If you need to print badges for preregistered visitors ahead of their arrival, contact your EasyLobby system administrator or manager to allow you to print badges with a different time and date, or no time and date. Users with administrator permissions may preprint badges if desired.

6.17 Manage a group of visitors

When a large group of visitors arrives, you will want to process the visitors as quickly as possible. Here are some ways to speed the check-in process:

- Preregister expected visitors. Encourage employees to inform you of expected visitors so you can preregister them. Also, if your company uses EasyLobby eAdvance, encourage employees to preregister their visitors. You can quickly find today's preregistered visitors for your location by clicking **Visitor Lookup** > **Preregistered**.

- Print badges for preregistered visitors before they arrive. The check-in date and time is the date and time you print the badges. Your EasyLobby system administrator can change the date and time using the **Check In** tab of the **Custom Processing** window (see *Section 11.4: Print a badge with a custom check in time/date*).

- If you have card scanning set up, scan the visitors' driver's license or ID to quickly enter their information into EasyLobby.

- If you are not using card scanning, and the visitors are from the same company, enter the first visitor's information, then press **F4** to start a new visitor record with the same company information.

- If your procedures permit, enter only the known information that will be printed on the badges. Then, when the visitors arrive, you can enter additional contact information from business cards.

- If you are planning to print all the badges at once, as you add visitors, do at least one of the following to assist with the printing process:

  - Use a user-defined field that applies only to these visitors and not to any past visits. For example,the filed might contain '3/24/2018 sales meeting'.

  - Click **Check In** as you enter each visitor.

To print multiple badges, follow these steps:
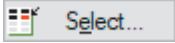
1. After you enter information for all the visitors, go to the grid view.

2. If you used a user-defined field that applies only to this group, click **Visitor > Lookup** > **User Defined**. In the **Search user defined fields** window, select the field you used for these visitors and click **OK**. If you checked in all the visitors as you entered them, click **Visitor** > **Sort by** > **Check In Time**.

   You can also look up preregistered visitors by choosing **Visitor** > **Lookup > PreRegistered Visitors**, **Preregistered date**, **Employee's preregistered**, or **Department's preregistered** to look up preregistered visitors for a certain date, employee or department.

3. Once you have the desired records isolated in the grid view, hold down the Shift key and click the first listed visitor in this group. While still holding down the Shift key, click the last listed visitor in the group. This highlights all the visitors in the group.

4. Click **Print Badge**. You will see the **Print Options** window.

Note: If you are using a label printer, EasyLobby prints the badges immediately.

5. In the **Print Options** window, follow these steps to select a printer other than the normal group printer:

   a. Click ![printer icon] Change...

b. In the **Printer Choice** window, click **Select** next to **printer page-independent**. You can click the option button to the left of **printer page-dependent** and select two different printers if you want to print the first page of badges on a different printer than the following pages.

c. In the **Print Setup** window, select the name of the printer you want to use. Click **Properties** if you want to change any print properties.

d. Click **OK** in the **Print Setup** window.

e. Click **OK** in the **Printer Choice** window.

6. In the **Print Options** window, follow these steps to start printing on a label other than the upper-left one on the page:

a. Click

b. In the **Choose Start Position** window, click the label position of the first label on the page.

c. Click **OK**.

7. Click **Start Print** in the **Print Options** window.

6.18 Panic message

This function automatically sends an email to predesignated recipients if there is a problem in the lobby.

- Click **File** > **Panic Message**, or click the Panic Message icon on the Toolbar.

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Package management

EasyLobby includes a package management system. When a package arrives for an employee at the front desk, you can enter the package information quickly, print a package label for each item and automatically notify the employee by email that a package has arrived.

The package management system in EasyLobby includes two views of packages. The views are:

Form View: Shows package information in a form view.

Grid view: Lets you view packages in a list.

As on all EasyLobby grid views, dynamic updates are enabled in all networked visitor logs. Dynamic updates refresh the grid view automatically.

7.1   Add and edit a package

When a package arrives:

1. Click **New** from either the package grid or form view, or click **Package** > **New Package**.
2. Click the **Package Info** tab.

3. On the **Employee** drop-down, select the employee to whom the package is addressed.
4. In the **From** box, type the sender of the package.
5. If there is more than one item in the shipment, type the number of items in the **Quantity** box. A label can be printed for each package.

6. Complete the remaining package information as needed.

7. The Custom Id is automatically set. The current user's login name is automatically entered into the **Operator** field.

8. Click **Print Label**. The package is checked in, and a label printed for each package. EasyLobby supports DYMO 450T label printers.

7.1.1 Notify an employee of a package

If the auto-email feature is configured (see *Section 3.4.7.2: Package Check In tab*) and the employee has an email address on file, an email notification of the package will automatically be sent to the employee selected on the **Packages** form. To manually send a notification to the employee:

- Click ⬛ on the toolbar to either send or format an email to notify the employee they have a visitor or package.

7.1.2 Check out a package

When the package is delivered to the employee, you need to check out the package.

- Click **Check Out** to manually check out a package. The package record is time-stamped for the package pick-up/delivery.

To increase speed at your front desk, use a package label template that shows the Custom Id. When an employee picks up their package, just press **F12** to show the Quick Check Out dialog. Type the Custom Id from the package label and press enter. The package is checked out without disturbing your current work.

To automate the package check-out process, show a barcode of the Custom Id on the package label. When the employee picks up their package, just scan in the barcode and the package will automatically check out.

7.1.3 Use a signature with a package

To sign in or sign out a package:

1. Click the **Signature** tab on the **Packages** window.
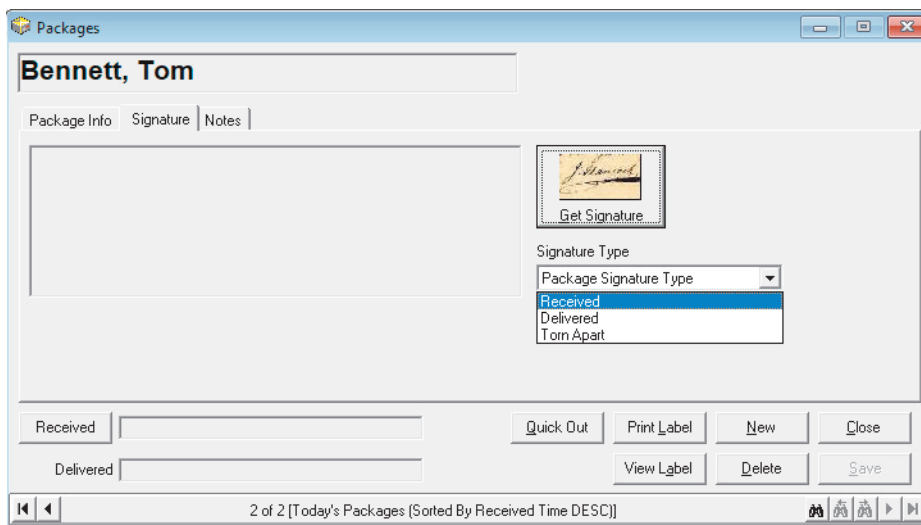
2. Click **Get Signature**.

3. Ask the visitor to write their signature on the Topaz signature capture device. As they sign, you will see their signature in the **Signature Acquisition** window.
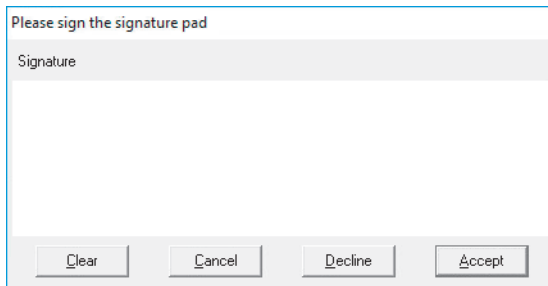
4. Click **Accept** and the signature will appear on the visitor record.

5. On the **Signature Type** drop-down, select the purpose for the signature.

7.1.4   Delete a package

Administrators and managers can delete any package record by clicking **Delete** in a package view. The associated employee is not deleted when you delete a package record.

7.1.5   Look up a package

You can find specific package records using techniques similar to those you use to find visitor records. The techniques for finding records are:

- Click **Package** > **Lookup** to see packages with a particular last name or in a particular department.

- Click **Package** > **Sort By** to sort records by received time, delivered time, last name, first name, in location, or stored location.

7.1.6   Package grid view

The **Package Grid** window lets you quickly review a group of package records. The records are displayed in a table with columns and rows. As on all EasyLobby grid views, dynamic updates are enabled in all networked visitor logs. Dynamic updates refresh the grid view automatically. You can control the appearance and organization of the grid view in the following ways:

- Resize window: Drag the edge of the grid view window to make the window bigger or smaller.

- Resize columns and rows: Drag the border after a column heading to make that column wider or narrower. Drag the border between any two rows to make all rows taller or shorter.

- Change column order: You can move any column by dragging and dropping the heading where you want it to be. The changes you make to the grid view are automatically saved. Click **Reset Theme** on the grid view to restore the default grid settings.

7.1.7 Add and edit a package carrier

1. Click **Package** > **Carriers**.
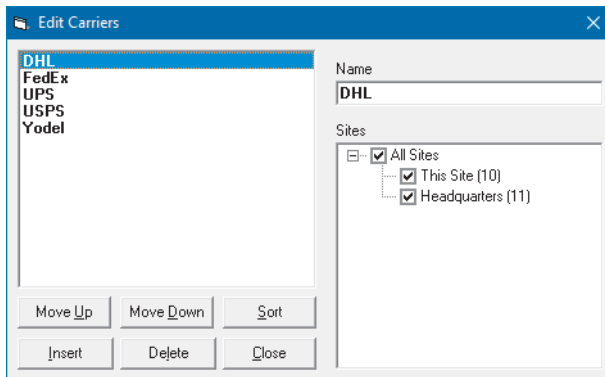
2. Click **Insert** to create a new carrier.
3. Type a descriptive name for the carrier.
4. Click **Move Up**, **Move Down**, or **Sort** to change the order of the carriers.
5. Click **Close**.

7.1.8 Delete a package carrier

1. Click **Package** > **Carriers**.
2. Select the carrier you want to remove and click **Delete**.
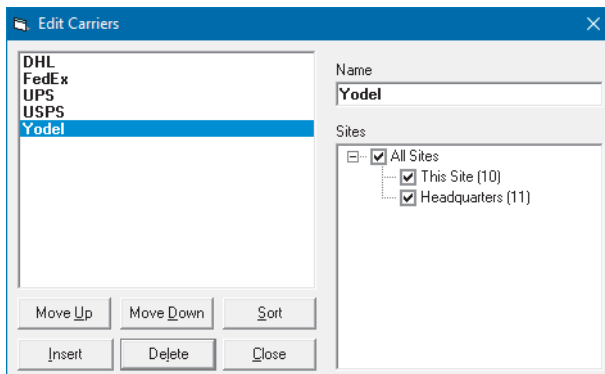
3. Click **Close**.

7.1.9   Add and edit a package stored at a location

    1. Click **Package** > **Stored At**.
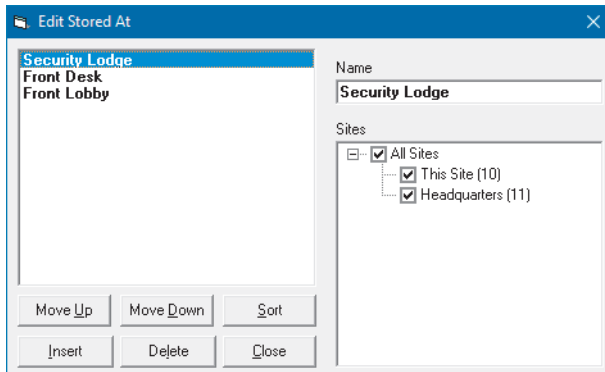
    2. Click **Insert** to create a new Stored At location.

    3. Type a descriptive name for the Stored At location.

    4. Click **Move Up**, **Move Down**, or **Sort** to change the order of the locations.

    5. Click **Close**.

7.1.10   Delete a package stored at a location

    1. Click **Package** > **Stored At**.
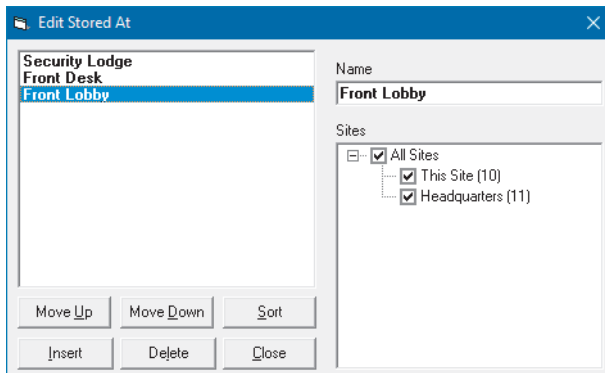
    2. Click **Delete** to delete a location.

    3. Click **Close**.

7.1.11   Add and edit a package type

1. Click **Package** > **Package Types**.
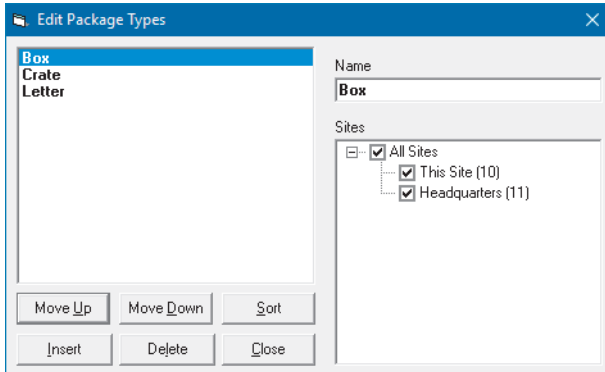
2. Click **Insert** to create a new package type.
3. Type a descriptive name for the package type.
4. Click **Move Up**, **Move Down**, or **Sort** to change the order of the package types.
5. Click **Close**.

7.1.12   Delete a package type

1. Click **Package** > **Package Types**.
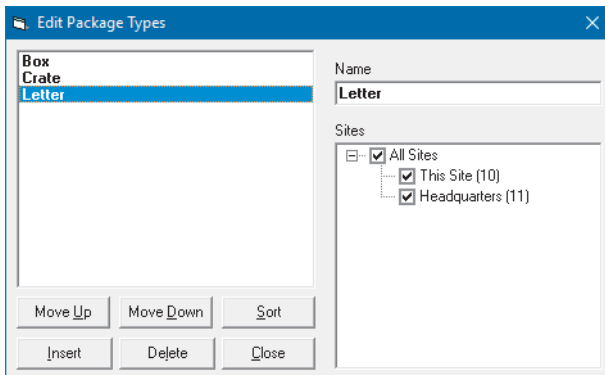
2. Click **Delete** to delete a package type.
3. Click **Close**.

Asset management

EasyLobby includes an asset management module which can be used if you loan out items (keys, radios, etc.) to either visitors or employees while on site. When an asset is removed (loaned) from the facility by an employee, you can enter the asset information and print an asset label for each item.

The asset management system in EasyLobby includes two views of assets. The views are:

Form View: Shows asset loan information in a form view.

Grid view: Lets you view asset loans in a list.

As on all EasyLobby grid views, dynamic updates are enabled in all networked visitor logs. Dynamic updates refresh the grid view automatically.

8.1 Add and edit an asset type

You must first create asset types for later selection in the **Assets** form.

1. Click **Asset** > **Asset Types**.
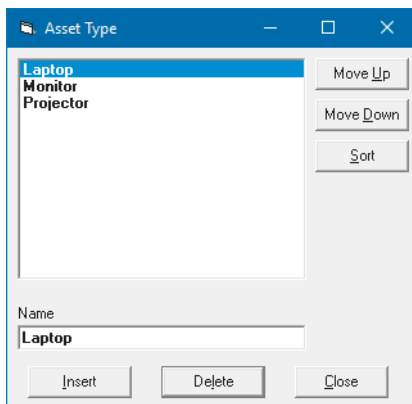
2. Click **Insert** to create a new asset type.
3. Type a descriptive name for the asset type.
4. Click **Move Up**, **Move Down**, or **Sort** to change the order of the package types.
5. Click **Close**.

8.1.1   Add and edit an asset

You must create assets to be loaned out:

1. Click **New** from either the asset grid or form view, or click **Asset** > **Edit Assets**.
2. Click **New** to create an asset.

3. Type a descriptive name for the asset.
4. Complete the remaining asset information as needed.
5. The Custom Id is automatically set.
6. If desired, click **Print Tag** to print an asset tag to adhere to the asset.
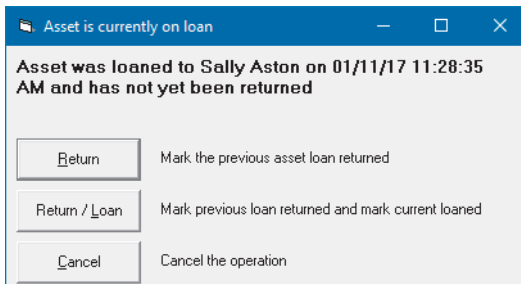
8.2   Asset loan

When an asset is issued to a visitor or employee:

1. Click **New** from either the asset loan grid or form view, or click **Asset** > **New Asset Loan**.

2. Select the asset to be loaned on the **Asset** drop-down.
3. In the **Loan To** options, select either **Employee** or **Visitor**.
4. On the **Employee** (or **Visitor**) drop-down, select the employee/visitor who is checking out the asset.
5. To specify a Due Date, check the **Due Date** field. The due date defaults to the current day and time. You can change the day and time by using the arrows to the right of the day/time to select the desired day and time.
6. Complete the remaining information as needed.
7. Click **Print Label**. The asset is loaned out and a label is printed for the asset loan. Alternatively, click **Loan** to loan the asset without printing a label for it.
8. If you select an asset that has already been loaned, the **Asset is currently on loan** window is displayed. You have the option to return the asset, return and re-loan the asset, or cancel the loan.

8.2.1 Return an asset

When the asset is returned by the employee, you must enter this in EasyLobby.

- Click **Return** to manually return an asset. The asset record is time-stamped for the asset return.

To increase speed at your front desk, use an asset label template that shows the Custom Id. When an employee returns the asset, press **F12** to show the Quick Check Out window. Type the Custom Id from the asset label and press enter. The asset is returned without disturbing your current work.

To automate the asset return process, show a barcode of the Custom Id on the asset label. When the employee returns their asset, scan the barcode on the label and the asset is automatically marked as returned.

8.2.2 Using a signature with an asset

To sign out or sign in an asset:

1. On the **Asset Loan** form window, click the **Signature** tab.
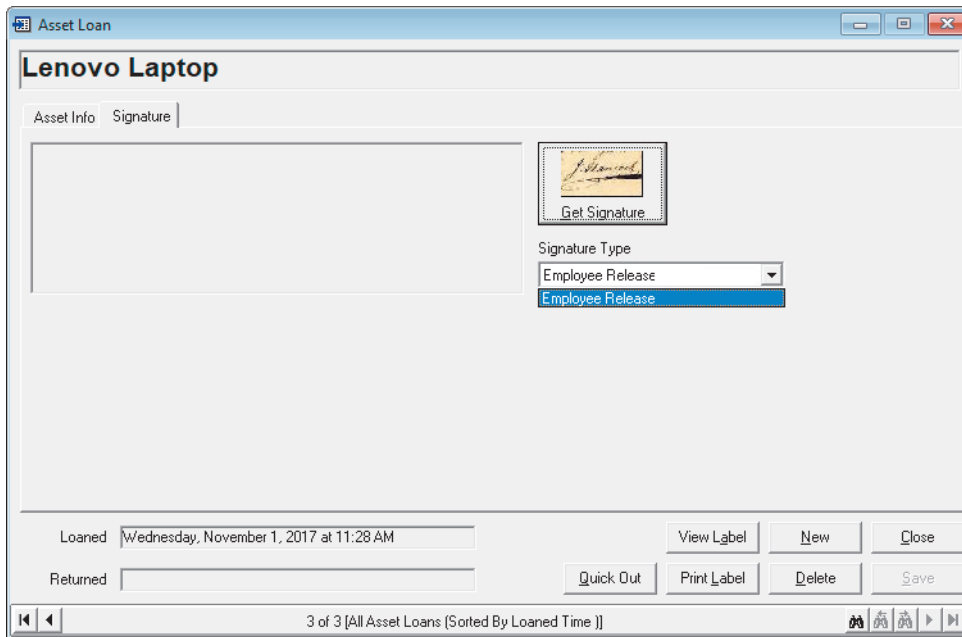
2. Click **Get Signature**.
3. Ask the employee to write their signature on the Topaz signature capture device using the special pen attached to it. As they sign, you will see their signature in the **Signature Acquisition** window.
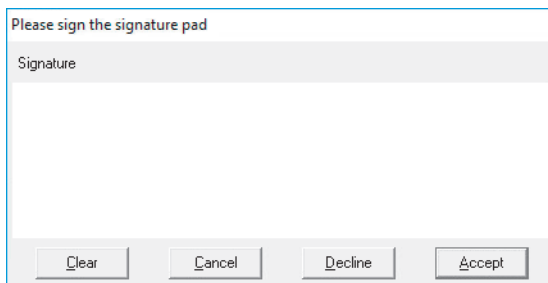
4. Click **Accept** and the signature will appear on the lost and found record.

5. On the **Signature Type** drop-down, select the purpose for the signature.

8.2.3 Delete an asset record

Administrators and managers can delete any asset record by clicking **Delete** in an asset view. The associated employee is not deleted when you delete an asset record.

8.2.4 Look up an asset record
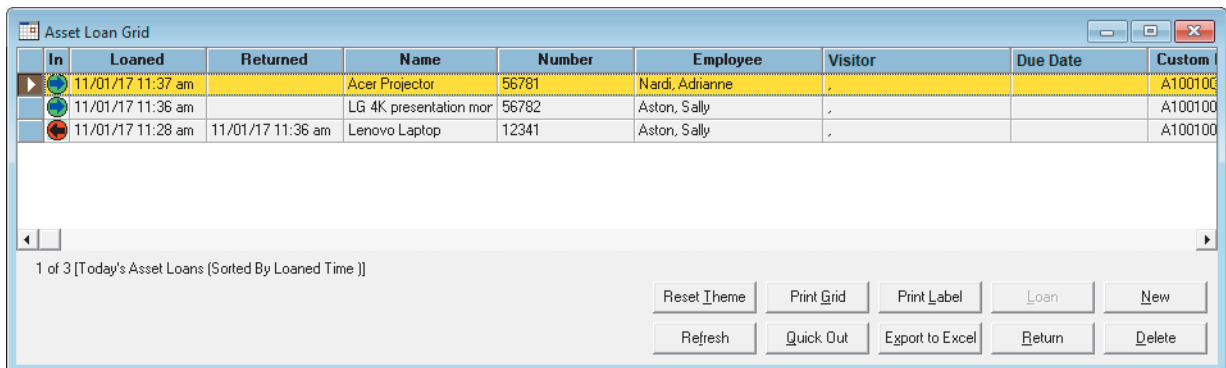
You can find specific asset records using techniques similar to those you use to find visitor records. The techniques for finding records are:

- Use a lookup in the **Asset** > **Lookup** menu to see assets with a particular last name or in a particular department.

- Use a sort by in the **Asset** > **Sort By** menu to sort records by received time, delivered time, last name, first name, in location, or stored location.

8.2.5 Asset loan grid view

The **Asset Loan Grid** window lets you quickly review a group of asset records. The records are displayed in a table with columns and rows. As on all EasyLobby grid views, dynamic updates refresh the grid view automatically. You can control the appearance and organization of the grid view in the following ways:

- Resize window: Drag the edge of the grid view window to make the window bigger or smaller.

- Resize columns and rows: Drag the border after a column heading to make that column wider or narrower. Drag the border between any two rows to make all rows taller or shorter.

- Change column order: You can move any column by dragging and dropping the heading where you want it to be. The changes you make to the grid view are automatically saved. Use **Reset Theme** on the grid view to restore the default grid settings.

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Lost and found management

A Lost and Found module is included with EasyLobby. When an item is found, you can enter its information quickly and take a picture of the item to track items that are lost to be recovered later by their owner.

The Lost and Found in EasyLobby includes two views of items. The views are:

Form View: Shows lost and found information items in a form view.

Grid view: Lets you view lost and found items in a list.

As on all EasyLobby grid views, dynamic updates are enabled in all networked visitor logs. Dynamic updates refresh the grid view automatically.

9.1   Add and edit a lost and found type

You must first create lost and found types for later selection in the **Lost and Found** form.

1. Click **Lost & Found** > **Lost and Found Types**.
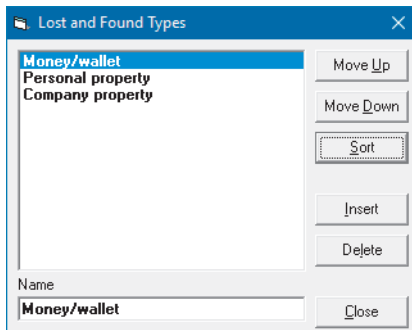
2. Click **Insert** to create a new lost and found type.
3. Type a descriptive name for the lost and found type.
4. Click **Move Up**, **Move Down**, or **Sort** to change the order of the lost and found types.
5. Click **Close**.

9.1.1 Add and edit a lost and found item

When you find a lost item:

1. Click **New** from either the lost and found grid or form view, or click **Lost and Found** > **New Found Item**.

2. Click the **Lost and Found Info** tab.
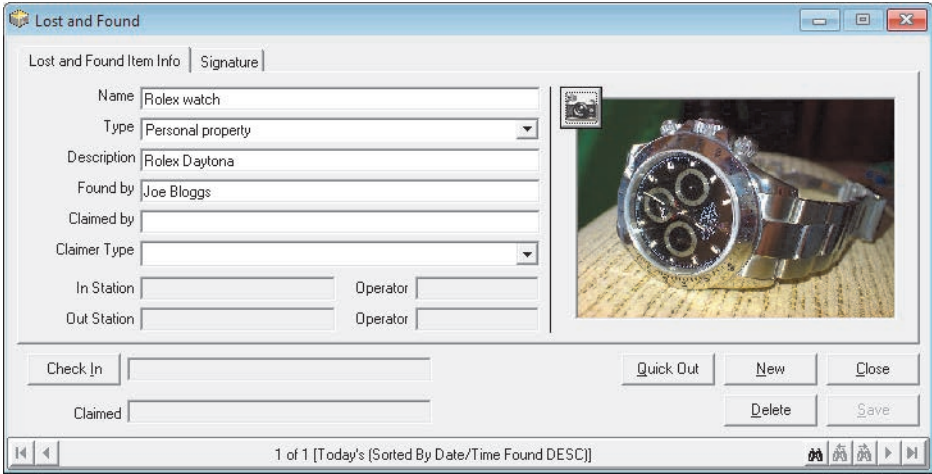
3. Enter information about the found item.

4. If desired, click the camera icon to take a picture of the item (requires that a web camera is connected to the computer). Alternatively, when the **Photo Capture** window is displayed, click **File** > **Load** to load an image from file.

5. Click **Check In** to record the day and time the item was found.

9.1.2 Look up a lost and found item

The **Lost & Found** > **Lookup** menu functions similarly to the **Lookup** menu for visitors. A check mark indicates which lookup is currently selected. The options in this menu are:

- Today's
- Current
- By date range
- All
- Search... to specify text or fields

9.1.3 Lost and found grid view

The lost and found grid view window lets you quickly review a group of lost and found records. The records are displayed in a table with columns and rows.

As on all EasyLobby grid views, dynamic updates are enabled in all networked visitor logs. Dynamic updates refresh the grid view automatically.

You can control the appearance and organization of the grid view in the following ways:

- Resize window: Drag the edge of the grid view window to make the window bigger or smaller.

- Resize columns and rows: Drag the border after a column heading to make that column wider or narrower. Drag the border between any two rows to make all rows taller or shorter.
- Change column order: You can move any column by dragging and dropping the heading where you want it to be. The changes you make to the grid view are automatically saved. Click **Reset Theme** on the grid view to restore the default Grid settings.

9.1.4   Check out a lost and found Item

When the item is recovered by its owner, you check out the lost item to return it.

- Click **Check Out** on the Lost and Found form to manually check out the item. The item record is time-stamped with the claimed information.

9.1.5   Use a signature with a lost and found item

To sign in or sign out an item:

1. Click the **Signature** tab
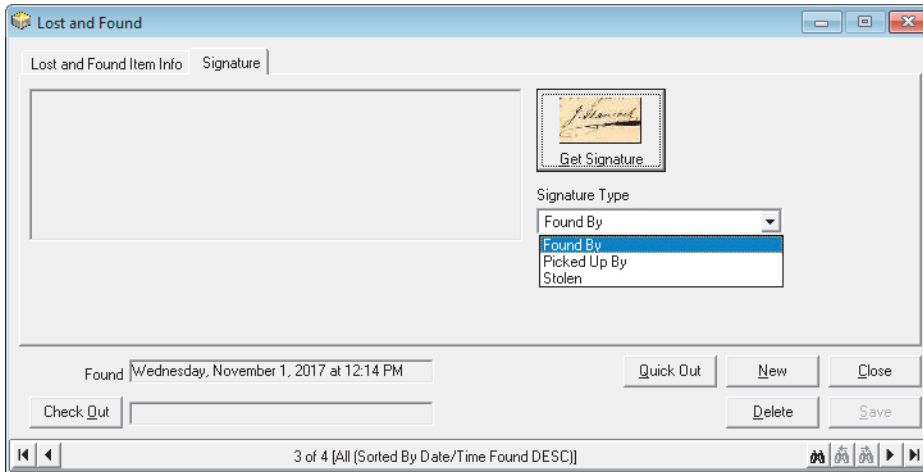
2. Click **Get Signature**.
3. Ask the visitor to write their signature on the Topaz signature capture device using the special pen attached to it. As they sign, you will see their signature in the **Signature Acquisition** window.
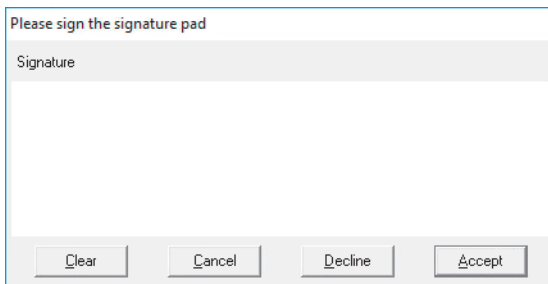
4. Click **Accept** and the signature will appear on the lost and found record.
5. On the **Signature Type** drop-down, select the purpose for the signature.

9.1.6   Delete a lost and found item

Administrators and managers can delete any lost and found record by clicking **Delete** in a lost and found view.

Reports

An EasyLobby administrator or manager can run and create reports to analyze visitor traffic and other data tracked by EasyLobby. You can create reports on visitors, employees, reasons, packages, or the watch list.

10.1 Create a report

Reports are run from either EasyLobby SVM or Administrator. You can run standard reports or use the report wizard to create customized reports and save them for reuse. To create a report, follow these steps:

1. Click **File** > **Reports**.
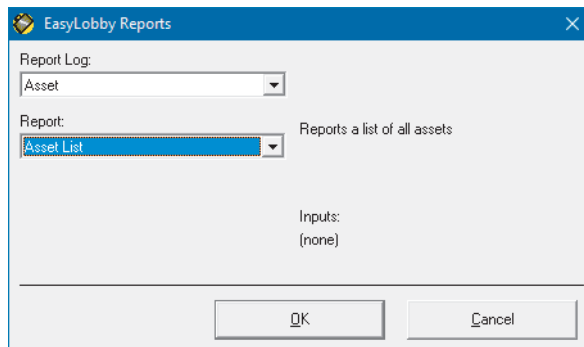
2. On the **Report Log** drop-down, select the records for which you want to create a report.
3. On the **Report** drop-down, select the type of report you want to create. As you select different reports, the **Description** area explains how the selected report is grouped and sorted. The **Inputs** area lists values you will need to provide to create the report.
4. Click **OK**.
5. Respond to the dialogs that ask for the report inputs. If you are asked for a date range, you may either select a start and end date or check the **Use all Dates** option. Click **OK**.
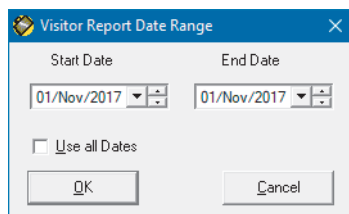
6. The report will appear on screen optimized for print out.

10.1.1 View a report

When you are viewing a report, EasyLobby displays the report toolbar.
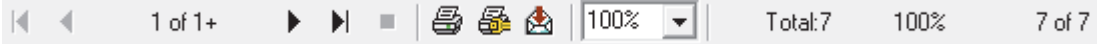
The buttons on the left allow you to move from page to page in the report.

- Move to the first page of the report.
- Move to the previous page of the report.
- Move to the next page of the report.
- Move to the last page of the report.
- Stop moving to the specified page of the report.

The zoom drop-down lets you specify the percentage of actual size at which you would like to view the report.

The text to the right of the zoom drop-down shows how many records are in the report and in the visitor log.

10.1.2 Print a report

To print a report, click one of the following buttons on the report toolbar:

Opens the **Print** window, which allows you to print the report to the system printer.

Opens the **Print Setup** window, which allows you to select the report printer and choose the paper size, source, and orientation.

10.1.3 Export a report

You may want to use data from a report in another program, such as a spreadsheet. To do this, you can export report data to a file or an email message. To export a report, follow these steps:

1. Click the on the report toolbar.
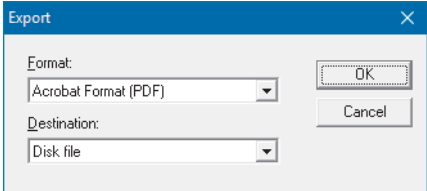
2. Select a format for the export:
   - **Acrobat Format (.pdf)**: Adobe Acrobat PDF, readable by anyone with Acrobat Reader.
   - **Character-separated values (.chr)**: This format allows you to customize the text export. You can select a character to place between fields and a character to surround fields (such as a quotation mark).
   - **Comma-separated values (.csv)**: This format can be imported by many databases and spreadsheets.
   - **Crystal Reports (.rpt)**: This format can be read by Crystal Reports.

- **Crystal Reports 7.0 (.rpt)**: This format can be read by Crystal Reports version 7.0.
- **Data Interchange Format (.dif)**: This format is supported by many spreadsheets, particularly for cutting and pasting to the clipboard.
- **Microsoft Excel (.xls)**: Versions of Excel from 5.0 to 8.0 are supported. If you have a newer version of Excel, it will be able to read the older formats. If you choose an extended format, you can also set format options for column headings, functions, column width, and tabular format.
- **HTML 3.2 and 4.0 (.htm)**: This format creates web pages. Several versions of HTML are supported. You type the name and select the location of a new folder where you want to store the web pages. A report may be exported as one or more web pages. The first page is called default.htm unless you change the name.
- **Lotus 1-2-3 (. wk*)**: This format can be read by several versions of this spreadsheet program.
- **ODBC –** (Multiple) There may be many entries beginning with **ODBC -**, followed by the names of each ODBC data source available on your system, including your EasyLobby System Data Source, for example EL100 or EasyLobby10.
- **Paginated text (.txt)**: You can choose how many lines each page of text should have. Record style (.rec): This format creates columns of values aligned with spaces and without spaces.
- **Record style (columns no spaces)**: A plain text file using spaces to separate the data.
- **Record style (columns with spaces)**: A plain text file using spaces to separate the data.
- **Report definition:** Outputs a Crystal Report definition text file, containing a definition of how the report is produced, but not containing any of the data.
- **Rich Text (Exact) Format (.rtf)**: This format can be opened with Microsoft Word and many other word-processing programs. Text is contained in anchored text boxes. The appearance of this document is designed for printing, but it is difficult to edit.
- **Tab-separated text (.ttx)**: This format uses tabs to separate fields. It contains the same text as the report. Dates and numbers are treated as plain text.
- **Tab-separated values (.tsv)**: This format uses tabs to separate fields. Each line is a record that contains report and group headings, field values, and group and report footers.
- **Text (.txt)**: This format contains the text of the report aligned with spaces and line breaks to a format close to that of the report on your screen.
- **Word for Windows (.doc)**: This format can be opened with Microsoft Word and many other word-processing programs. Text is contained in normal paragraphs. This format is easier to edit than files exported with Rich Text Format.

3. Select a destination for the report. The destination choices are:

- Application
- Disk file
- Exchange Folder
- Lotus Domino
- Microsoft Mail (MAPI)

To save the data to a file, select Disk file. To send the data as a file attached to an email message, select Microsoft Mail (MAPI).

Note: You can choose the Microsoft Mail destination even if you use a different email program. Reports can be sent by email if you have any MAPI-compliant email program on your computer. For some email programs, you may need to set an option to make your email program act as the 'MAPI client'.

4. Click **OK**.

5. Answer any questions about how you would like to export the data and click **OK**. The types of formatting decisions you can make are described in the list in step 2.

6. If you chose to export to a file, select a location and filename for the file.

7. Click **OK**.

   If you chose to send the data by email, complete the information for the email message. When you click **Send**, this information is used to create and send a message with the exported file attached.
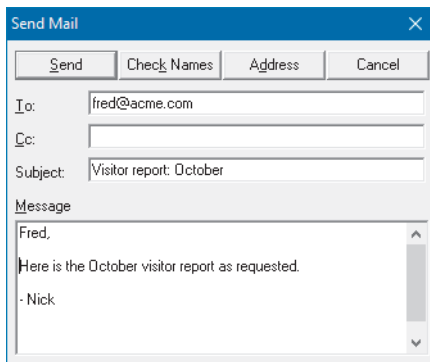
10.1.4   Create a report with the report wizard
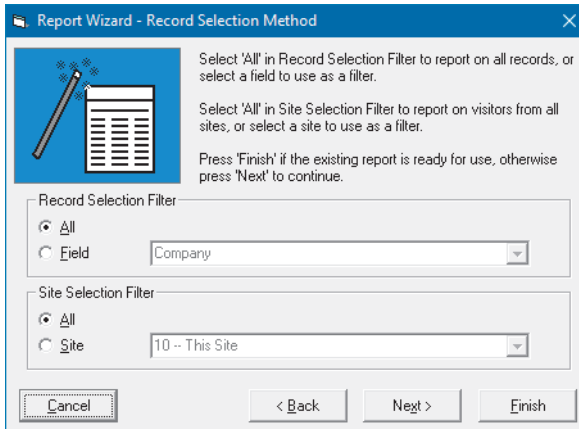
To create a report with the report wizard, follow these steps:

1. Click **File** > **Report Wizard**.
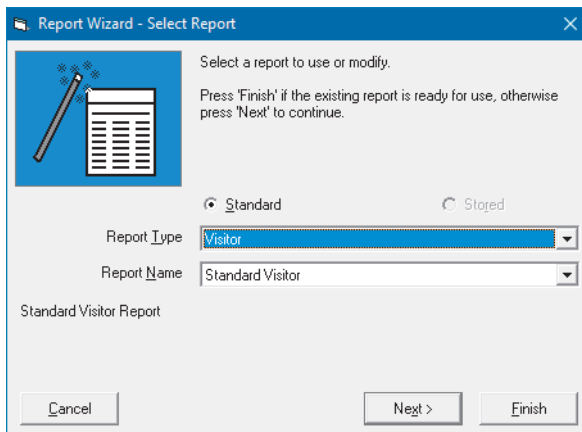
2. Select a **Standard** report (a preprepared report format) or a **Stored** report (a report that you previously created).

3. Select the **Report Type**.

4. Select the **Report Name**. The default choices for Standard reports are:
   - **Standard**: Displays basic information for the report type.
   - **Standard, 1 Group**: Groups the Standard information by one criteria.
   - **Standard, 2 Group**: Groups the Standard information by two criteria.
   - **Extended Report**: Displays all information for the report type.
   - **Extended Report with picture**: Displays all information and picture.

5. To run the report without any changes, click **Finish**.
   To run the report with field filters, ordering, and date ranges, click **Next >**.
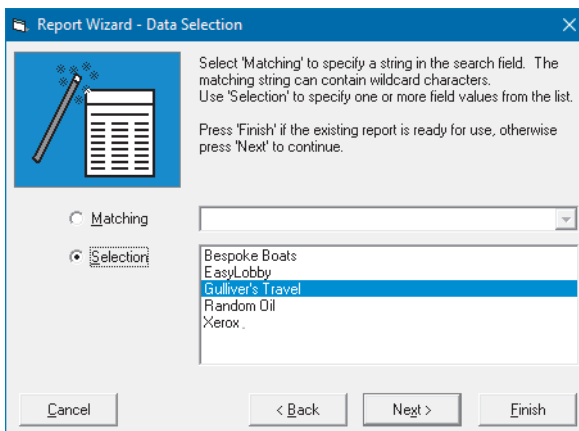
6. To run the report with all records, select **All** and click **Next >**. Go straight to step 9 of these instructions.

7. Alternatively, to run the report for a particular field, select **Field** and then the field you would like to see, for example if you want to run the report for a particular department. Click **Next >**.

8. Select the desired field and click **Next >**.

9. Select **Order by**, the desired ordering field, and the desired dates.

    ▪ Click **Next >** to save your new report so you can reuse it at a later time.

    ▪ Click **Finish** to run the report without saving it to a file first.
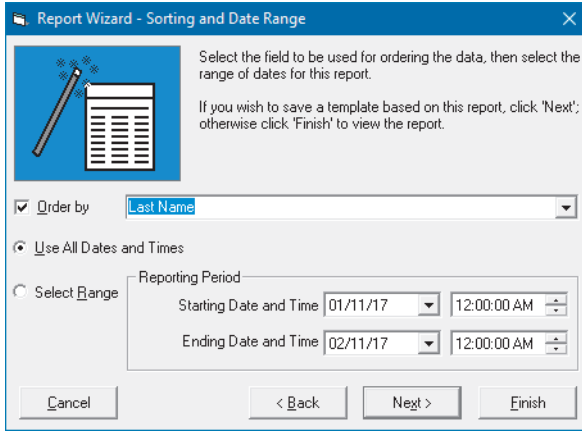
10. To save the report, type a report name and report description and click **Save**. The next time you enter the report wizard, your report is listed under the stored report option.
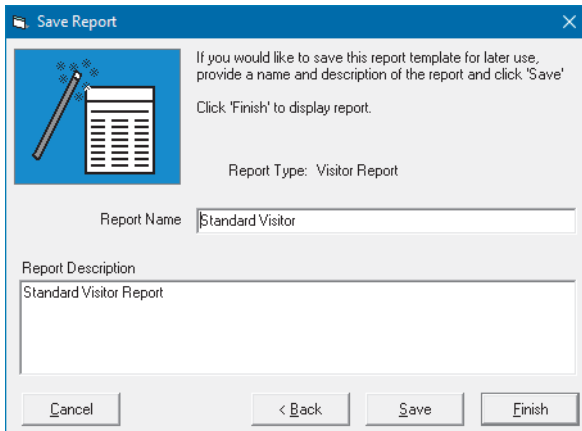
11. Click **Finish** to run the report.

10.1.5 Current visitor report

This report displays visitors currently checked in for the day/time it is run. It does not display visitors who were checked in on a previous day and never checked out. This is a quick one-step report in case you need to know quickly who is in the building, for example in an emergency.

▪ Click **File** > **Current Visitor Report**, or click the Current Visitor report icon on the Toolbar.

You can choose to have the Current Visitor report sent via email as well. See *Section 3.4.7.6: Current Visitor tab*.

10.1.6 Visit history report

This report displays all the visits made by the selected visitor.

▪ Click **File** > **Visit History Report**, or click the Visit History Report icon on the Toolbar.

Print badges

There are several types of badges in EasyLobby: visitor badges, employee badges, package labels, and asset labels. EasyLobby includes over 200 badge templates to choose from for printing visitor badges, as well as the ability to make your own badge templates. Templates include the ability to print the barcode of the identifying number for the visitor (Custom Id), the visitor's photo, the employee's photo, self-expiring badges, and preprinted badges.

The templates are set once by the EasyLobby system administrator or manager and then used when the operator prints a badge or label. The only choice for the operator is to select either the predefined badge printer or the predefined group printer (to print multiple badges). A user with novice access can only print single badges on the badge printer.

Printers must be installed before selecting badge templates.

11.1   Print options window

The **Print Options** window is displayed only when the printer for a particular label type has been configured as a sheet printer, such as a laser or inkjet printer. This setting is made in the **Edit** > **Badge Options** tabs; see *Section 11.2: Badge options*.
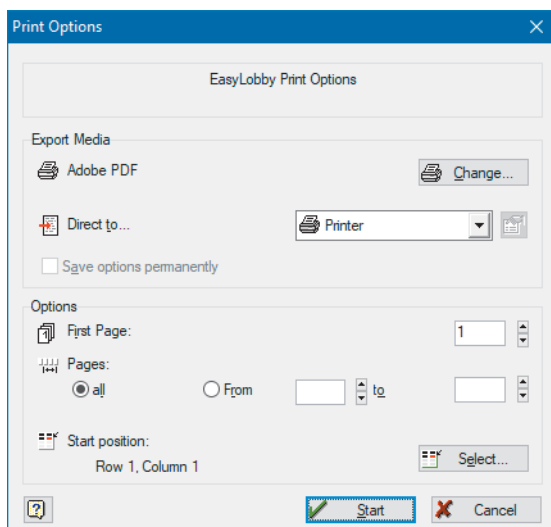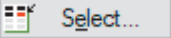
Follow these steps to select a printer other than the default printer:

1.   Click

2. Select **Printer Page-Independent**. If you select the other option, **Printer Page-Dependent**, you can select two different printers. This allows you to print the first page of badges on a different printer than the following pages.

3. Select the name of the printer you want to use.

4. Click **Properties** if you want to change any print properties.

5. Click **OK** in the **Print Setup** window.

6. Click **OK** in the **Printer Choice** window.

11.1.1   Print options

If you are printing labels on a laser printer or ink-jet printer, you can select the location of the first label on the page. The page diagram shows the label positions for the selected label stock. In the **Print Options** window, follow these steps to start printing on a label other than the upper-left one on the page:

1. Click Select…

2. Click the label position of the first label on the page.

3. Click **OK**.

11.2 Badge options

Note: Printers must be installed before selecting badge templates.

- Click **Edit** > **Badge Options**.

Depending on your user level, you can select the settings for All Sites or a particular Site and Station (see *Appendix A: User level access to commands*).

Make sure you are setting the options for the correct site and station. You can check the computer's site and station from **Edit** > **Station Enrollment**.

11.2.1 Visitor tab

To set up a visitor badge follow these steps:

1. Click the **Visitor** tab, then the **Badge Selection** tab.
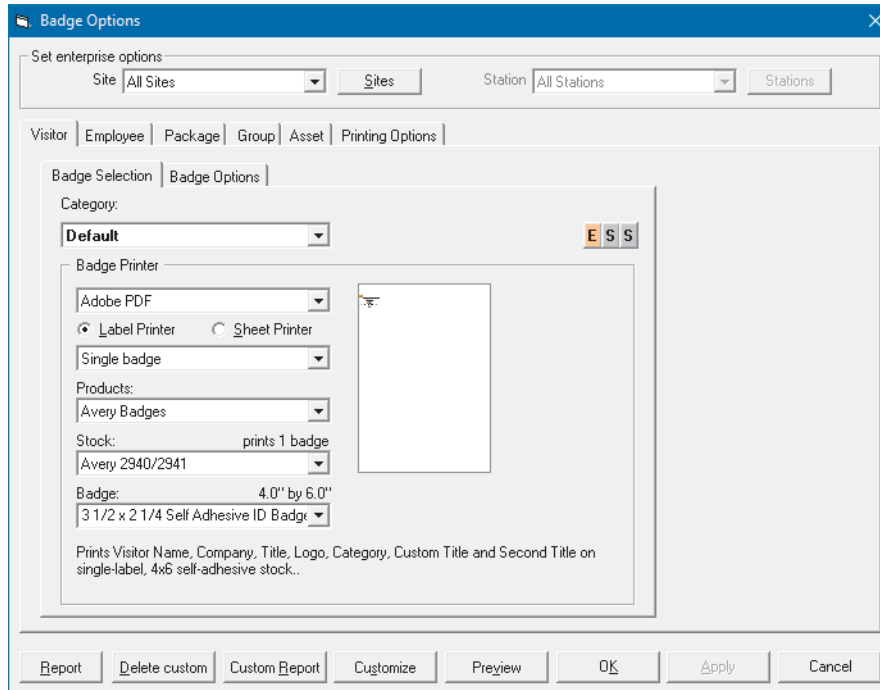
2. Select the category for the badge. There is a default badge that can be used for any category.

3. Select the badge printer on the **Badge Printer** drop-down. In addition, select either **Label Printer** or **Sheet Printer** to identify the type of printer.

4. Select the type of badge template you would like to use on the **Products** drop-down. Note that the badge template you choose must match the label stock you use in your printer. If they do not match, the badge does not print correctly because they may not be the same size. If you are using a DYMO LabelWriter, the choices are:

    - **DYMO LabelWriter** contains badge templates for the DYMO LabelWriter.

    - **DYMO LabelWriter – Pre-printed** contains badge templates for the DYMO LabelWriter that are formatted for preprinted labels.

    - **DYMO LabelWriter w/Barcode** contains badge templates for the DYMO LabelWriter that include the barcode for the identifying number for the visitor (Custom Id).

    - **DYMO LabelWriter w/Photos** contains badge templates for the DYMO LabelWriter that include photos of the visitor and employee (optional).

    - **DYMO LabelWriter – with TEMPBadge** contains badge templates for the DYMO LabelWriter that are formatted for labels from TempBadge (i.e. self expiring labels).

    Other options include, but are not limited to:

    - **Full page**: A badge formatted as a full page poster (prints full size on an inkjet/laser printer).

    - **IDenticard Visitor Badges**: Multiple format PVC cards.

- **Label printers**: Used for label printers that are not the DYMO LabelWriter.
- **PVC**: Plastic card printer.
- **Seiko**: Plastic card printer.
- **Ulrich**: Plastic card printer.

If you are using an inkjet/laser printer, the choices are:

- Avery Standard label sheets.
- TEMPBadge.

5. On the **Stock** drop-down, select the label stock you are using for the badges. The text above the **Stock** drop-down shows how many labels are printed at once. The stock choices will differ depending on which printer and product you are using.

6. On the **Badge** drop-down, select the desired badge template. The text below the drop-down lists the fields that will be printed on the badge. The text above the **Badge** drop-down shows the size of the badge. The badge will automatically preview (it may take a few seconds to display each badge as you select it from the drop-down). Click **Preview** to see a larger version of the badge (see *Section 11.3.1.6: Preview window*).

7. Click the **Badge Options** tab to set the custom and second titles, and the logo for the badge.

8. Click **Apply**.

Note: The badge template you choose must match the label stock you use in your printer. If they do not match, the badge does not print correctly because they may not be the same size.

11.2.2   Employee tab

To set up an employee badge follow these steps:

1. Click the **Employee** tab.
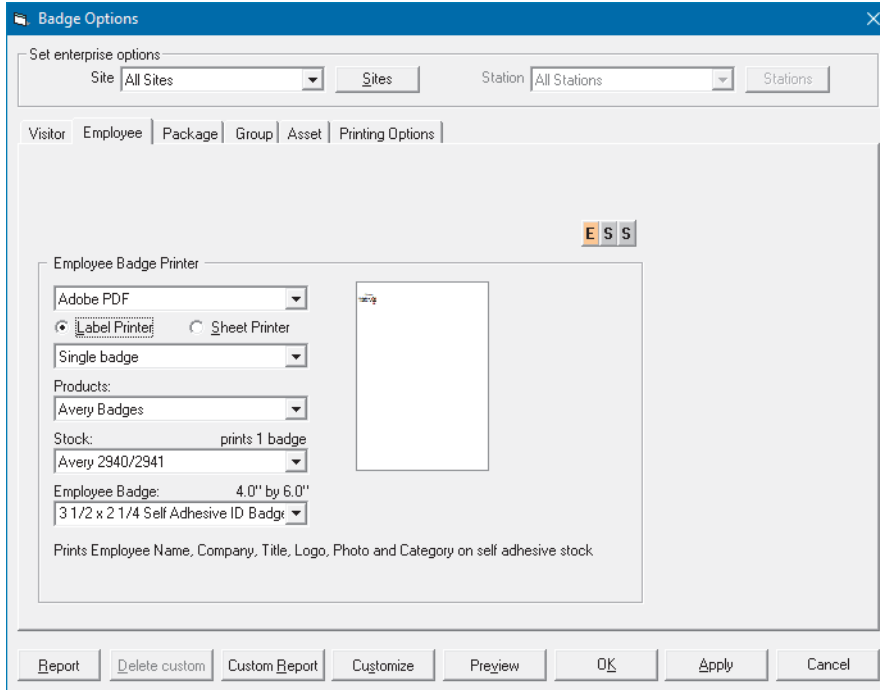
2. Select the badge printer in the **Employee Badge Printer** area.
3. Select either **Label Printer** or **Sheet Printer** to identify what type of printer this is.
4. Select the type of badge template you would like to use on the **Products** drop-down.
5. On the **Stock** drop-down, select the label stock to use for the badges. The text above the **Stock** drop-down shows how many labels are printed at once. The stock choices differ depending on which printer and product you are using.
6. On the **Employee Badge** drop-down, select the badge template. The text below the drop-down lists the fields that are printed on the badge. The text above the **Employee Badge** drop-down shows the size of the badge. The badge will automatically preview (it may take a few seconds to display each badge as you select it on the drop-down). Click **Preview** to see a larger version of the badge (see *Section 11.3.1.6: Preview window*).
7. Click **Apply**.

11.2.3   Package tab

These options are used to setup package labels and associated label options.

11.2.3.1 Label Selection tab

To set up a package label follow these steps:

1. Click the **Package** tab, then the **Label Selection** tab.
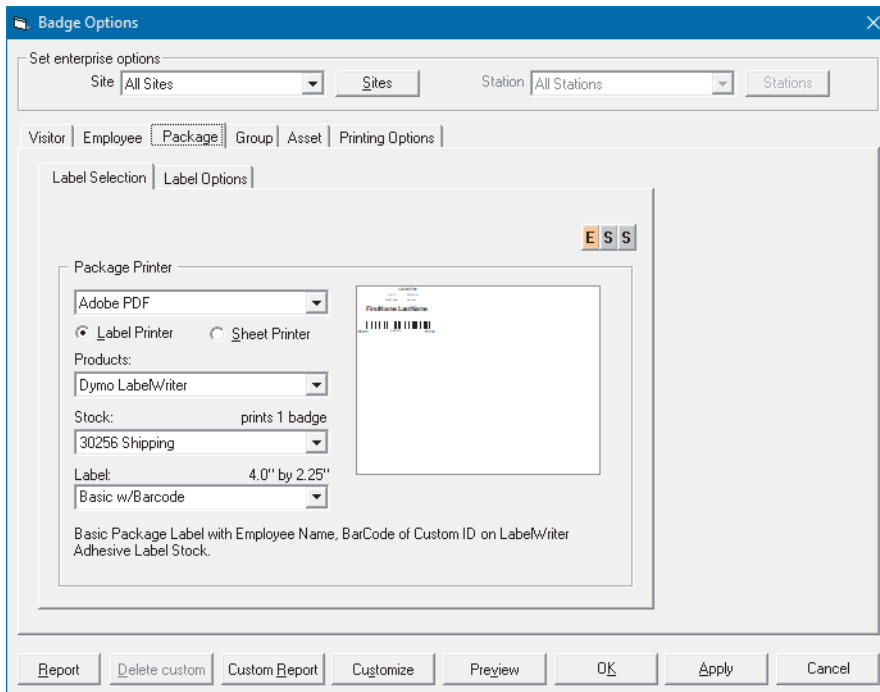
2. Select the package printer in the **Package Printer** area.
3. Select either **Label Printer** or **Sheet Printer** to identify what type of printer this is.
4. Select the type of label template you would like to use on the **Products** drop-down. If you are using a DYMO LabelWriter, the choices are:
   - **DYMO LabelWriter** contains badge templates for the DYMO LabelWriter.
   - **Label Printers** is used for label printers that are not the DYMO LabelWriter. If you are using an inkjet/laser printer, the Avery Standard label sheets are available.
5. On the **Stock** drop-down, select the label stock to use for the labels. The text above the **Stock** drop-down shows how many labels are printed at once. The stock choices differ depending on which printer and product you are using.
6. On the **Label** drop-down, select the label template. The text below the drop-down lists the fields to print on the label. The text above the **Label** drop-down shows the size of the label. The label will automatically preview (it may take a few seconds to display each label as you select it on the drop-down). You can click **Preview** to see a larger version of the label (see *Section 11.3.1.6: Preview window*).

11.2.3.2 Label Options tab

1. Click the **Label Options** tab.
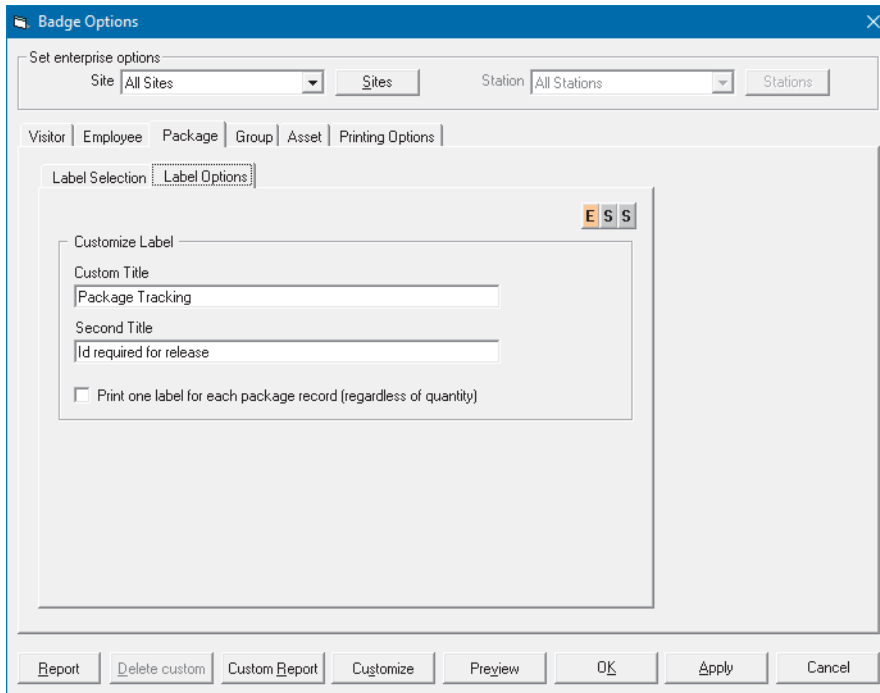
2. Set the custom and second titles for the label.

3. The **Print one label for each package record** option prints multiple package labels according to the value in the **Quantity** field of the packages form view **Package Info** tab; see *Section 7.1: Add and edit a package.*

4. Click **Apply**.

11.2.4   Group tab

To select a visitor badge and printer for printing multiple badges, follow these steps on each computer where the user will print badges. EasyLobby lets you set up a single-badge *badge printer*, a multi-badge *group printer*, and a *package printer*. Typically, the badge printer is a dedicated label printer such as the DYMO LabelWriter. The group printer is typically a laser or ink-jet printer using sheets of Avery or other labels. To set up a group printer:

1. Click the **Group** tab.
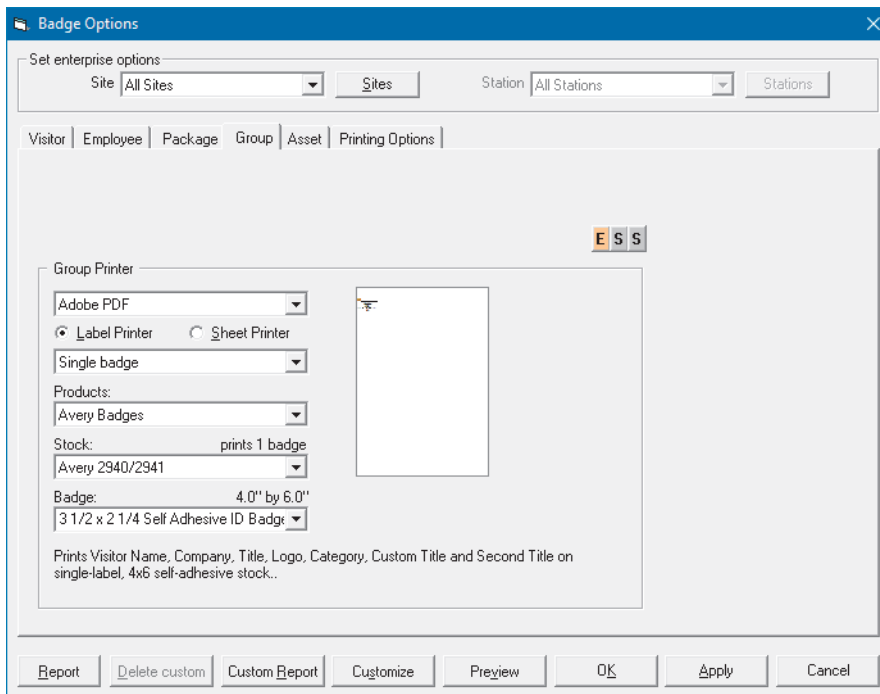
2. Select the group printer in the **Group Printer** area.
3. Select either **Label Printer** or **Sheet Printer** to identify what type of printer this is.
4. Select the type of badge template you would like to use on the **Products** drop-down. If you are using a DYMO LabelWriter, the choices are:

   - **DYMO LabelWriter** contains badge templates for the DYMO LabelWriter.
   - **DYMO LabelWriter – Pre-printed** contains badge templates for the DYMO LabelWriter that are formatted for preprinted labels.
   - **DYMO LabelWriter – with Barcode** contains badge templates for the DYMO LabelWriter that include the barcode for the identifying number for the visitor (Custom Id).
   - **DYMO LabelWriter – with Photos** contains badge templates for the DYMO LabelWriter that include photos of the visitor and employee (optional).
   - **DYMO LabelWriter – with TempBadge** contains badge templates for the DYMO LabelWriter that are formatted for labels from TempBadge (i.e. self-expiring labels).
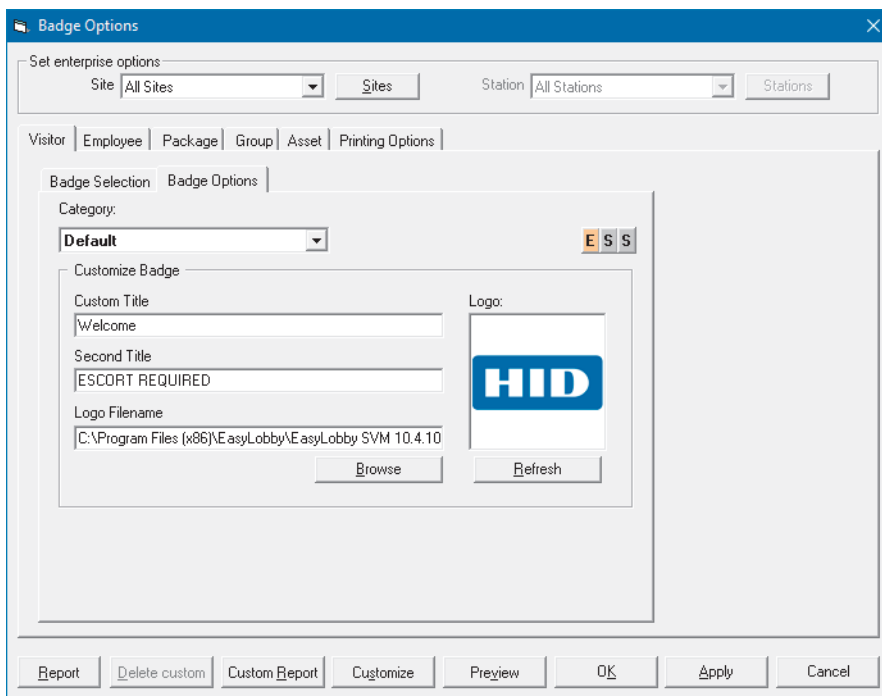
   Other options include, but are not limited to:

   - **Full page**: A badge formatted as a wanted poster (prints full size on an inkjet/laser printer).
   - **IDenticard Visitor Badges**: Multiple format PVC cards.

- **Label printers**: Used for label printers that are not the DYMO LabelWriter
- **PVC**: Plastic card printer.
- **Seiko**: Plastic card printer.
- **Ulrich**: Plastic card printer.

If you are using an inkjet/laser printer, the choices are:

- Avery Standard label sheets.
- TempBadge.

5. On the **Stock** drop-down, select the label stock to use for the badges. The text above the **Stock** drop-down shows how many labels are printed at once. The stock choices differ depending on which printer and product you are using.

6. On the **Badge** drop-down, select the desired badge template. The text below the drop-down lists the fields that are printed on the badge. The text above the **Badge** drop-down shows the size of the badge. The badge will automatically preview (it may take a few seconds to display each badge as you select it on the drop-down). Click **Preview** to see a larger version of the badge (see *Section 11.3.1.6: Preview window*).

7. Click **Apply**.

11.2.5   Asset tab

These options are used to setup asset loan labels, asset tags, and associated label options.

11.2.5.1 Asset Loan Label tab

To set up an asset loan label follow these steps:

1. Click the **Asset** tab, then the **Asset Loan Label** tab.
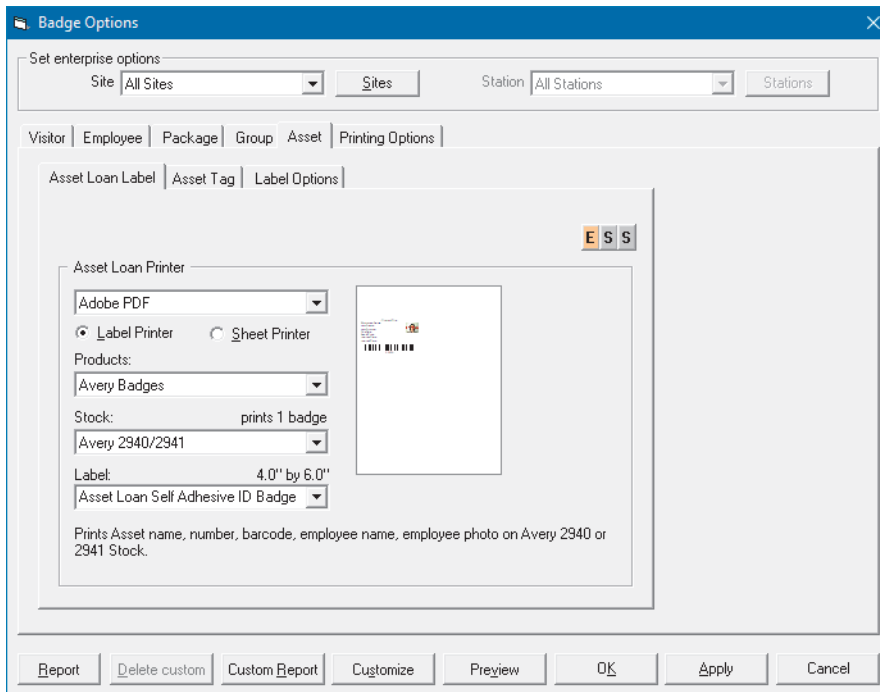
2. Select the asset label printer in the **Asset Loan Printer** area.

3. Select either **Label Printer** or **Sheet Printer** to identify what type of printer this is.

4. Select the type of badge template you would like to use on the **Products** drop-down. If you are using a DYMO LabelWriter, the choices are Avery Badges or Dymo LabelWriter.

5. On the **Stock** drop-down, select the label stock to use for the asset labels. The text above the **Stock** drop-down shows how many labels are printed at once. The stock choices differ depending on which printer and product you are using.

6. On the **Label** drop-down, select the label template. The text below the drop-down lists the fields that are printed on the label. The text above the **Label** drop-down shows the size of the label. The label will automatically preview (it may take a few seconds to display each label as you select it on the drop-down). Click **Preview** to see a larger version of the label (see *Section 11.3.1.6: Preview window*).

11.2.5.2 Asset Tag tab

To set up an asset tag follow these steps:
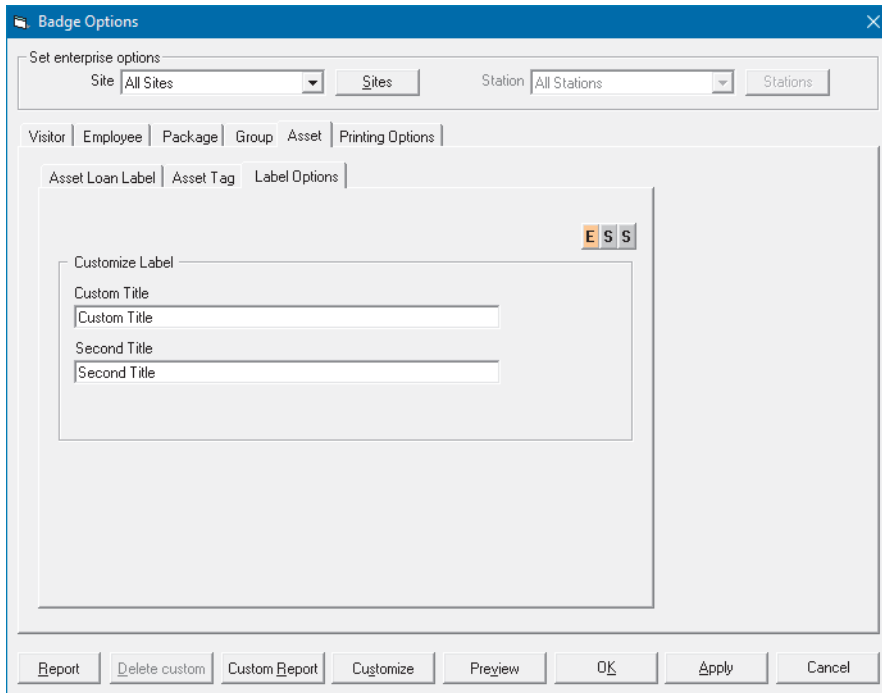
1. Click the **Asset** tab, then the **Asset Tag** tab.
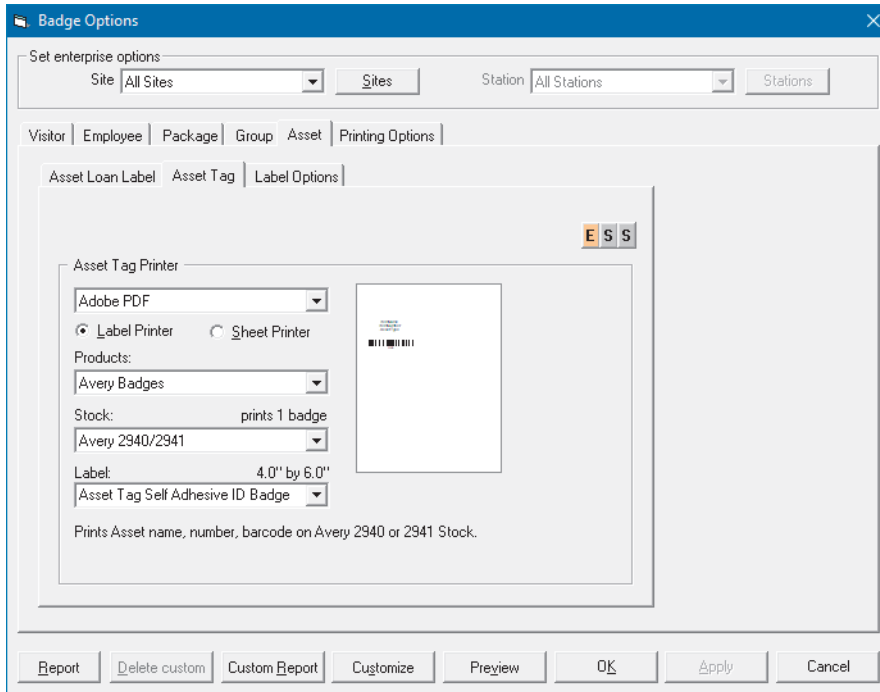
2. Select the asset tag printer in the **Asset Tag Printer** area.

3. Select either **Label Printer** or **Sheet Printer** to identify what type of printer this is.

4. Select the type of badge template you would like to use on the **Products** drop-down. If you are using a DYMO LabelWriter, the choices are Avery Badges or Dymo LabelWriter.

5. On the **Stock** drop-down, select the label stock to use for the asset tags. The text above the **Stock** drop-down shows how many tags are printed at once. The stock choices differ depending on which printer and product you are using.

6. On the **Label** drop-down, select the tag template. The text below the drop-down lists the fields that are printed on the tag. The text above the **Label** drop-down shows the size of the tag. The tag will automatically preview (it may take a few seconds to display each tag as you select it on the drop-down). Click **Preview** to see a larger version of the tag (see *Section 11.3.1.6: Preview window*).

11.2.5.3 Label Options tab

1. Click the **Label Options** tab.

2. Set the custom and second titles for the label.
3. Click **Apply**.

11.2.6   Printing Options tab
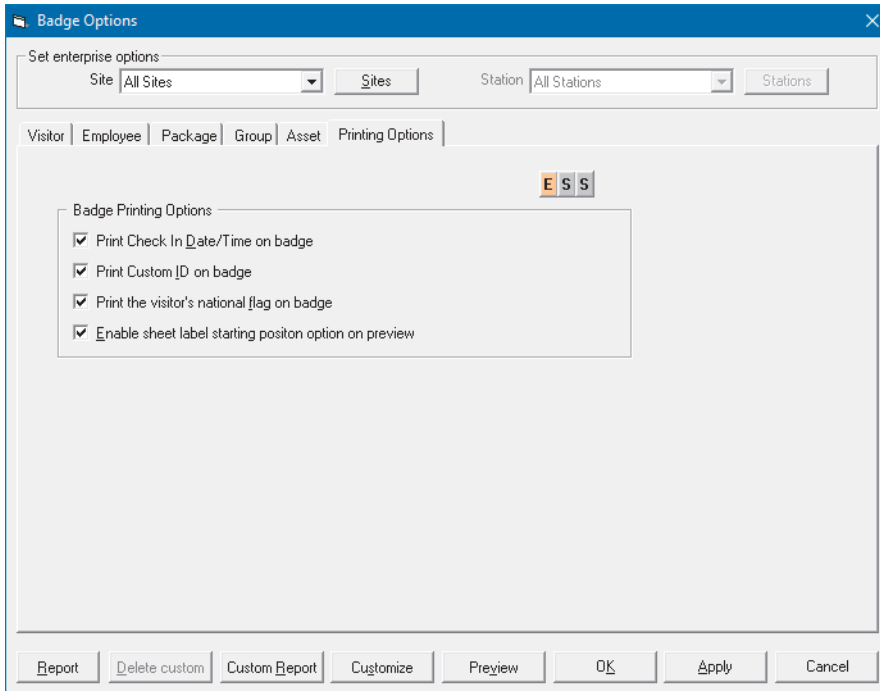
There are several options for printing visitor badges and package labels that allow you to override what is printed on a badge.

■ Badge Printing Options

Print Check in Date/Time on badge: If you use a badge template that shows date/time, but do not want date/time printed, clear this option.

Print Custom ID on badge: If you use a badge template that shows Custom Id but do not want the Custom Id printed, clear this option.

Print the visitor's national flag on the badge: If you add the flag variable on the badge template and specify a country for the visitor, this option allows you to display the visitor's national flag on the badge.

Enable sheet label position option on print preview: If you are using sheets of labels, this option allows you to skip the positioning option when viewing the badge.

11.3 Create a custom badge

You can create custom badges by clicking **Customize** at the bottom of the **Badge Options** window.

1. On the **Badge**, **Employee Badge**, or **Label** drop-down found on a badge options tab, select the badge closest in appearance to the badge you would like to create, and then click **Customize**.
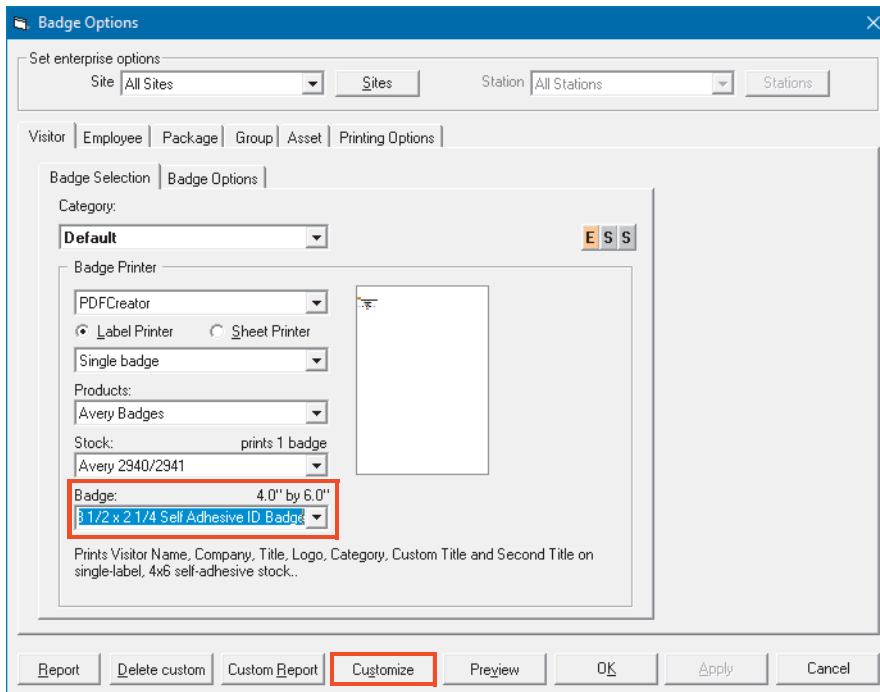
2. In the Template area select **New**. Type a new template name and template file (this must end with the extension .lbl). Click **Next >**.
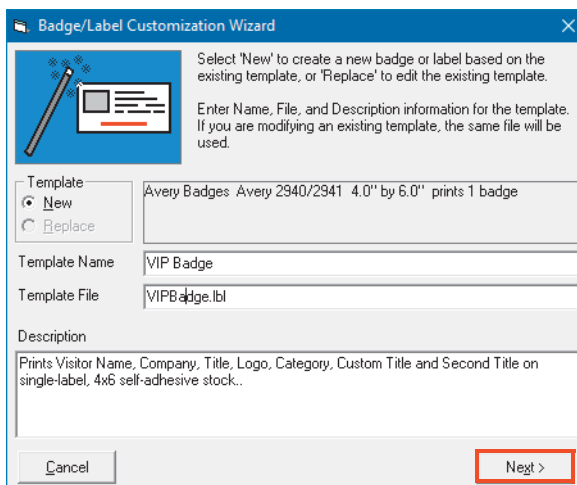
3. The EasyLobby **Designer** window is used to customize the template. It displays the layout of the badge (the fields), a layout preview (the values for the fields in shaded areas), and a preview of the complete badge.
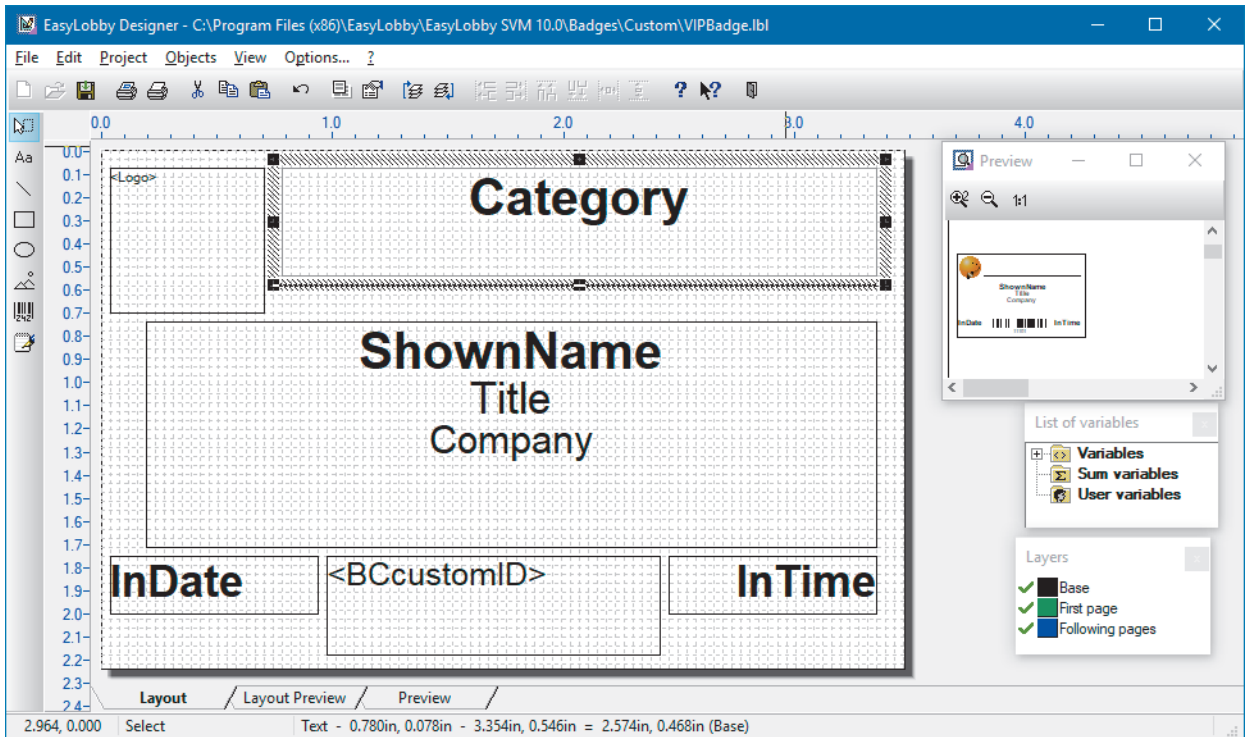
11.3.1   Customize the badge

- To move a field, click and drag the field's border with your mouse. You can resize the field using the border's sizing handles.

- To change the font properties and font size, double-click in the field. Change the font on the **Text Properties** tab.
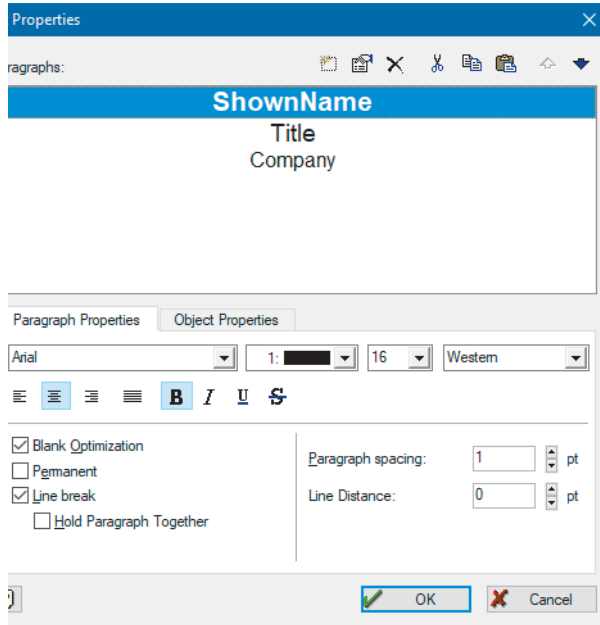
11.3.1.1   Add a new text field

1. Click **Objects** > **Insert** > **Text**. The mouse pointer changes to a cross.
2. Left-click and drag to create a new text box.
3. Select the field from the list of variables and drag it into the text box.
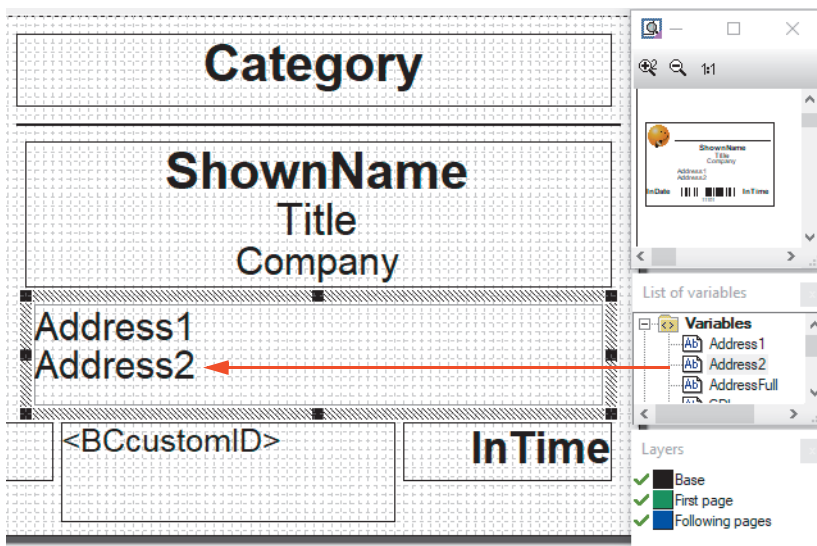
The variables choices include:

Variable: Definition	Variable: Definition
ShownName: First name and last name of the visitor	UserDefCapt 1–24: user defined field label 1–24
Title: visitor's title	UserDefCapt2: user defined field label 2
Company: visitor's company	UserDefCapt3: user defined field label 3
Country: visitor's country	UserDefCapt4: user defined field label 4
Custom Title: custom title for the visitor's category (default if no category)	UserDefCapt5: user defined field label 5, etc
Logo: company logo	Address1: the first line of the visitor's address
Second Title: second title for the visitor's category (default if no category)	Address2: the second line of the visitor's address
Picture:	City: the city of the visitor
InDate: the date of visitor check-in	StateOrProvince: the state (or province) of the visitor
CheckInDOW: day of the week of visitor check-in	PostalCode: the zip or postal code of the visitor
InTime: the time of visitor check-in	WorkPhone: the work phone number of the visitor
CustomID: the custom Id for the visitor	Fax-the fax number of the visitor
BccustomID: barcode of the custom Id	Email: the email address of the visitor
BC3of9custID: barcode of the custom Id in 3 of 9 format	WEBSite: the web site address of the visitor
ValidDates: the valid from and to dates	LastNameFirst: the name of the visitor with last name first
Validfrom Date: the date the visitor badge is valid from	AddressFull: the full address of the visitor
ValidToDate: the date the visitor badge is valid to	CityStateZip: the city, state, and zip code of the visitor
ValidFromTime: the time the visitor badge is valid from	FirstName: the visitor's first name
ValidToTime: the time the visitor badge is valid to	LastName: the visitor's last name
ExpiredDate:	CheckInLocation: the location where the visitor was checked in
ExpiredDateTime:	CheckOutLocation: the location where the visitor was checked out
EmployeeName: the last name, then first name of the employee	CustomTitle:
EmpFirstLastName: the first name, then last name of the employee	YourCompany: your company's name
EmployeeDept: the department of the employee	YourAddress: the company's address
EmExtension: the extension of the employee	YourCSZ: the company's city, state, and zip
EmWorkPhone: the work phone number of the employee	Operator: the operator who checked in the visitor

Variable: Definition	Variable: Definition
EmEmergencyContact: the emergency contact of the employee	Cdkey: the EasyLobby license key
EmUserDefined1: the userdefined1 field on the employee screen	Vpic: the visitor's picture
Reason: the reason for the visit	Epic: the employee's picture
UserDefined1–24: the user defined 1-24 fields	Alt1pic: associate picture 1
UserDefined2-– the user defined 2 field	Alt2pic: associate picture 2
UserDefined3: the user defined 3 field	Alt1Caption: associate caption 1
UserDefined4: the user defined 4 field	Alt2Caption1: associate caption 2
UserDefined5: the user defined 5 field, etc.	

11.3.1.2 Align objects

1. Select the object. While holding down the Shift key, select the next object. A border around the objects is displayed.
2. Click **Objects** > **Arrange** > **Alignment**.
3. Select the required alignment options.
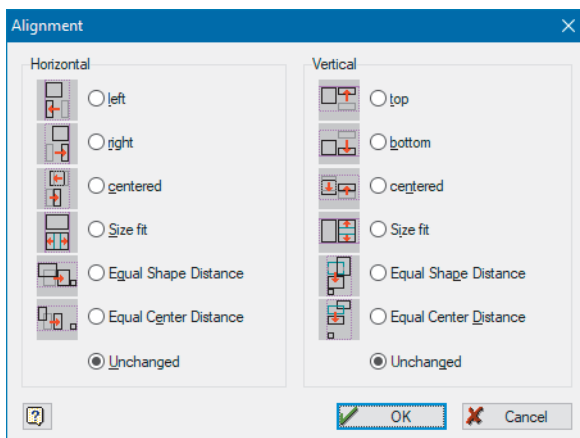
11.3.1.3 Add a field with text

1. Click **Objects** > **Insert** > **Text**.
2. Place your mouse on the badge layout and left-click and drag to create a text box.
3. Double-click inside the text box.
4. In the **Paragraphs** box, double-click the blue area.
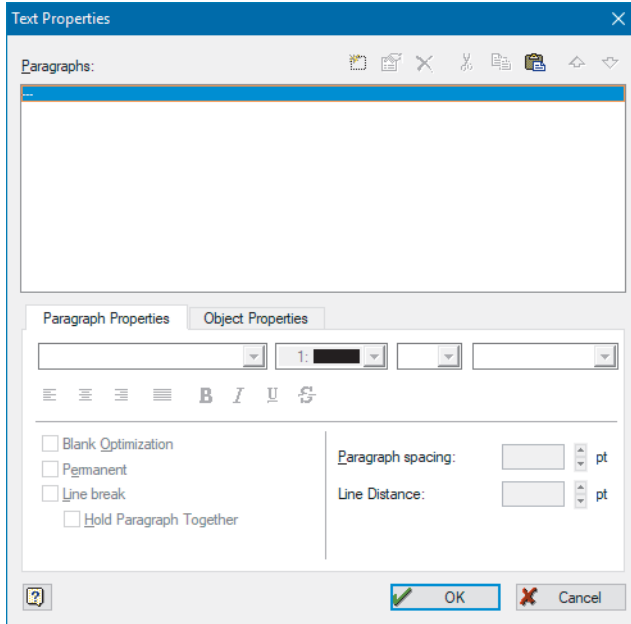
5. Click the **Text** tab.
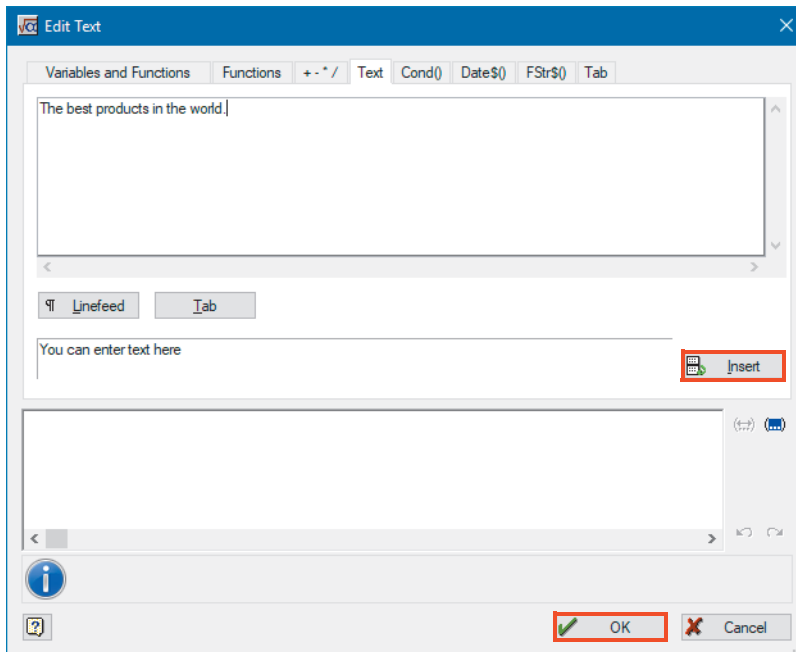
6. Type the text in the top portion of the window.
7. Click **Insert** on the right side of the middle of the window and then click **OK** twice.

11.3.1.4 Print a test badge

Click **File** > **Print Sample** > **Print Sample without Frames**.

11.3.1.5 Save changes to the badge

Click **File** > **Save**. The template then displays in the list of available templates for the Product and Stock of the template on which it was based, and may be printed and re-edited.

11.3.1.6 Preview window

When you preview a badge you can use the buttons in the preview toolbar:

The four arrow keys move to the first, previous, next, and last page of the preview (respectively). Unless you are printing multiple badges on the badge printer or a large number of badges on the group printer, the preview will contain a single page.

Zooms in by a factor of two. You can use this to see details more clearly.
Zooms out to the previous zoom setting.
Returns the zoom setting to show the whole page. If you are printing on a label printer, this is a single badge. If you are printing on a sheet printer, this is a page of labels.
Prints the current page.
Prints all pages.
Allows you to save the badge preview file.
Closes the preview window.

11.4 Print a badge with a custom check in time/date

Only managers and administrators can change a visitor's check in and/or check out date and time after the visitor has been checked in or checked out. Operators can change the printer to print multiple badges from badge printer to group printer.

In the **Custom Processing** window, you can print badges for the selected visitors. The text at the top of the window shows how many visitors you have selected. You can use the grid view to select multiple visitors before opening this window.

To print a badge/badges with custom check-in time/date for a visitor(s):

1. Find the visitor(s) in either the grid view or a single visitor view.
2. Click **Visitor** > **Custom Processing**.
3. The **Custom Processing** window allows you to print a badge with a custom check-in time, or remove the check-in.
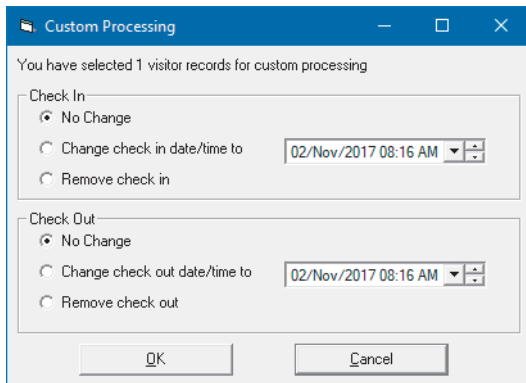
4. Make the required changes and click **OK**.

Reference

A.1   User level access to commands

Users of EasyLobby must log in with a user name and password. The login determines which commands and functions they can use, according to the following table.

Menu Command	Novice	Operator	Manager	Admin
File > New				✓
File > Open Visitor Log			✓	✓
File > Reports			✓	✓
File > Report Wizard			✓	✓
File > Current Visitor Report		✓	✓	✓
File > Visitor History Report		✓	✓	✓
File > Panic Message	✓	✓	✓	✓
File > Import				✓
File > Export				✓
File > Visitor Log > Backup			✓	✓
File > Visitor Log > Restore			✓	✓
File > Visitor Log > Maintenance				✓
File > Visitor Log > Compact			✓	✓
File > Visitor Log > Properties		✓	✓	✓
File > Photo Thumbs		✓	✓	✓
File > Watch List Thumbs	✓	✓	✓	✓
File > Logout	✓	✓	✓	✓
File> Change Password	✓	✓	✓	✓
File > Exit	✓	✓	✓	✓
Edit > Cut		✓	✓	✓

Menu Command	Novice	Operator	Manager	Admin
Edit > Copy		✓	✓	✓
Edit > Paste		✓	✓	✓
Edit > Users				✓
Edit > Reasons			✓	✓
Edit > Categories			✓	✓
Edit > Sites				✓
Edit > Stations				✓
Edit > Station Enrollment				✓
Edit > Signature Types			✓	✓
Edit > Alerts			✓	✓
Edit > Parking			✓	✓
Edit > Conference Rooms			✓	✓
Edit > Vehicle Types			✓	✓
Edit > Value-Based Approvals			✓	✓
Edit > Program Options			✓	✓
Edit > Badge Options			✓	✓
Edit > Device Options			✓	✓
Edit > Active Log ins				✓
Edit > Event Log				✓
Edit > Toolbar		✓	✓	✓
Edit > Status Bar		✓	✓	✓
Visitor > Lookup	✓	✓	✓	✓
Visitor > Sort By	✓	✓	✓	✓
Visitor > Form View	✓	✓	✓	✓
Visitor > Grid View	✓	✓	✓	✓
Visitor > New Visitor	✓	✓	✓	✓
Visitor > Copy Visitor	✓	✓	✓	✓
Visitor > Returning Visitor	✓	✓	✓	✓
Visitor > Visitor from Same Company	✓	✓	✓	✓
Visitor > Visit by Employee	✓	✓	✓	✓

Menu Command	Novice	Operator	Manager	Admin
Visitor > Merge Card/Id Data	✓	✓	✓	✓
Visitor > Check In	✓	✓	✓	✓
Visitor > Print Badge	✓	✓	✓	✓
Visitor > Pre Print	✓	✓	✓	✓
Visitor > Check Out	✓	✓	✓	✓
Visitor > Check Out All		✓	✓	✓
Visitor > Custom			✓	✓
Visitor > Add Visitor to Watch List			✓	✓
Visitor > Statistics	✓	✓	✓	✓
Employee > Lookup			✓	✓
Employee > Sort By			✓	✓
Employee > Form View			✓	✓
Employee > Grid View			✓	✓
Employee > New Employee			✓	✓
Employee > Print Badge			✓	✓
Employee > Add to Watch List			✓	✓
Employee > Scan to Create Employee			✓	✓
Employee > Companies			✓	✓
Employee > Categories			✓	✓
Employee > Departments			✓	✓
Package > Lookup	✓	✓	✓	✓
Package > Sort By	✓	✓	✓	✓
Package > Form View	✓	✓	✓	✓
Package > Grid View	✓	✓	✓	✓
Package > New Package	✓	✓	✓	✓
Package > Print Badge	✓	✓	✓	✓
Package > Carriers		✓	✓	✓
Package > Stored At		✓	✓	✓
Package > Package Types		✓	✓	✓
Asset > Lookup	✓	✓	✓	✓

Menu Command	Novice	Operator	Manager	Admin
Asset > Sort By	✓	✓	✓	✓
Asset > Form View	✓	✓	✓	✓
Asset > Grid View	✓	✓	✓	✓
Asset > New Asset Loan	✓	✓	✓	✓
Asset > Print Badge	✓	✓	✓	✓
Asset > Edit Assets		✓	✓	✓
Asset > Asset Types		✓	✓	✓
Lost & Found > Lookup	✓	✓	✓	✓
Lost & Found > Form View	✓	✓	✓	✓
Lost & Found > Grid View	✓	✓	✓	✓
Lost & Found > New Found Item	✓	✓	✓	✓
Lost & Found > Lost and Found Types		✓	✓	✓
Help > Contents	✓	✓	✓	✓
Help > Search For Help On	✓	✓	✓	✓
Help > Quick Reference	✓	✓	✓	✓
Help > EasyLobby, Inc.		✓	✓	✓
Help > About EasyLobby	✓	✓	✓	✓
Help > Register EasyLobby			✓	✓
Visitor Log Buttons				
Check In	✓	✓	✓	✓
Check Out	✓	✓	✓	✓
Print Badge	✓	✓	✓	✓
View Badge	✓	✓	✓	✓
Preregister	✓	✓	✓	✓
Quick Out	✓	✓	✓	✓
New	✓	✓	✓	✓
Delete			✓	✓
Close	✓	✓	✓	✓
Save	✓	✓	✓	✓
Reason Log Buttons				

Menu Command	Novice	Operator	Manager	Admin
Insert			✓	✓
Delete			✓	✓
Close			✓	✓
Employee Log Buttons				
Check In			✓	✓
Print Badge			✓	✓
View Badge			✓	✓
New			✓	✓
Delete				✓
Save			✓	✓
Close			✓	✓
Grid View Buttons				
Reset Theme	✓	✓	✓	✓
Refresh	✓	✓	✓	✓
Group Print		✓	✓	✓
Quick Out	✓	✓	✓	✓
Print Grid	✓	✓	✓	✓
Export to Excel			✓	✓
Print Badge	✓	✓	✓	✓
Pre-print	✓	✓	✓	✓
New	✓	✓	✓	✓
Delete			✓	✓

A.2   Shortcut keys

You can use the Alt key together with the underlined letter to open that menu or to select items, move to fields, and click buttons.

Shortcut key	Action
Alt+5	Resize (window)
Alt+S	Resize views to fit the current main window.
Alt+F4	Exit from EasyLobby.
Page Up	Move one record forward in the visitor log.
Page Down	Move one record back in the visitor log.
Ctrl+Home	Move to the first record in the visitor log.
Ctrl+End	Move to the last record in the visitor log.
Ctrl+A	Select all records currently shown in the grid.
F1	(Not used).
F2	Create a new blank visitor record.
F3	Create a new visitor record containing all the information from the current visitor record.
F4	Create a new visitor record using the company information from the current visitor record.
F5	Scan a business card.
F6	Check in a visitor.
F7	Check out a visitor.
F8	Print a badge.
F9	Preview a badge.
F10	Display visitor statistics.
F11	Send email to the host employee.
F12	Quick Check Out dialog.
Ctrl+F1	Send panic message.
Ctrl+F2	Lookup visitor by user defined field.
Ctrl+F3	Lookup employee by user defined field.
Ctrl+F4	Closes the currently active open window including grids and records.
Ctrl+F5	Lookup visitor by company.
Ctrl+F7	Lookup visitor by title.
Ctrl+F8	Lookup visitor by last name.
Ctrl+D	Displays the open data source box to select a database.
Ctrl+L	Logout
Ctrl+N	New database (Access)
Ctrl+O	Open visitor log (Access)
Ctrl+X	Cut
Ctrl+C	Copy
Ctrl+V	Paste

A.3 Toolbar legend

Access Level	Icon	Action
Manager or higher		Open a visitor log
		Send email to the host employee
		Add a new visitor
		Add a returning visitor
		Add a visitor from the same company
		Check in the selected visitor
		Check out the selected visitor
		Print a badge
		Open the visitor form view
		Open the visitor grid view
Manager or higher		Open the employee form view
Manager or higher		Open the employee grid view
		Package form view
		Package grid view
		Asset loan form view
		Asset loan grid view
		Lost & Found form view
		Lost & Found grid view
		Photo thumbnail view
		Merge data enabled for next card/license scan
		Current visitor report
		Visitor history report
		Panic message

A.4 Command line options

In some cases you may wish to quickly run an operation or schedule certain operations to run automatically in the background using the Windows Task Scheduler (for an example, see *Section 3.7.2.2: Schedule the employee import utility*). To do this you need to use some command line options, which are provided here.

A.4.1 Syntax

The standard syntax for running these commands uses the path to EasyLobbySVM.exe (within quotes) followed by options, each of which starts with the **-** character. For example, the following command initiates an import from a specified .csv file:

```
"C:\Program Files (x86)\EasyLobby\EasyLobby SVM 10.0\EasyLobbySVM.exe"
-Import=C:\EasyLobbySampleImport.csv
```

If any bracketed [ ] parameter contains a space, for example in the file path supplied for the `-import` option, then the entire option must be enclosed in quotes, for example:

```
"C:\Program Files (x86)\EasyLobby\EasyLobby SVM 10.0\EasyLobbySVM.exe"
"-Import=C:\File Name.csv"
```

The following command line options are available. Items in brackets ([ ]) indicate information you must provide when using the option:

- **-Import=[filepath]** initiates the import function normally found in **File > Import**. The [filepath] must contain the complete path and filename of the file you wish to import.

- **-VisitorBackup=[filepath]** runs a visitor log backup, normally started by **File > Visitor Log > Backup**. The [filepath] must contain the complete path and filename of the file you wish to export, followed by the -FromDate, -ToDate, and -DeleteAfter options. The -BackupSiteIds option can also be applied (see below).

- **-ArchiveInactiveEmployees=[filepath]** runs an employee archive normally started by **File > Visitor Log > Archive Inactive Employees**. The [filepath] must contain the complete path and filename of the file you wish to save. You must also supply the -DeleteAfter option. The -CreateBefore option may also be used with this option.

- **-FromDate=[Date]** is used with the -VisitorBackup option to provide the starting date in the range you wish to backup. The date format must be MM/DD/YYYY.

- **-ToDate=[Date]** is used with the -VisitorBackup option to provide the ending date in the range you wish to backup. The date format must be MM/DD/YYYY.

- **-DeleteAfter=[True/False]** is used with the -VisitorBackup and -ArchiveInactiveEmployees options. For -VisitorBackup, a value of True deletes the visitors being backed up, while False will leave them in the system. Similarly, when used with the -ArchiveInactiveEmployees option, a value of True deletes the archived employees, while False leaves them in the system.

- **-CreateBefore-[Date]** is used with the -ArchiveInactiveEmployees option. If provided, that option only backs up the inactive employees created before the specified date. If not provided, then all inactive employees are archived. The date format should be MM/DD/YYYY.

- **-BackupSiteIds=[SiteIdList]** is used in conjunction with the -VisitorBackup option. If provided, the option backs up data only for the site id's provided. If more than one site id is provided, they should be separated by commas.

A.5   eAdvance value-based approval

Value-Based Approvals are used exclusively in EasyLobby eAdvance. This feature allows you to require approval only for specific data entered on a preregistration form. To configure value-based approvals go to **Edit >Value-Based Approvals**.
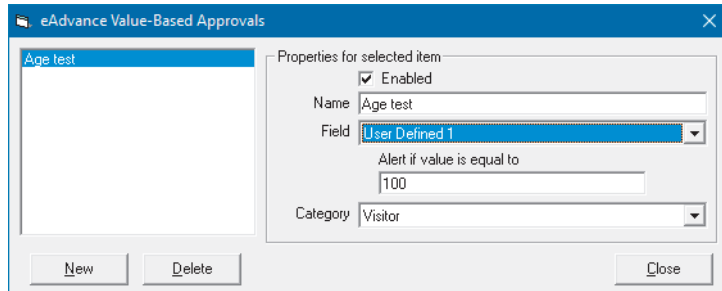
1. To add an approval click **New.** A new approval now is displayed in the list and you can specify a **Name**.

2. On the **Field** drop-down, select which user defined field you wish to use for the approval. If the field is formatted as a text field, you can now type the text phrase for which you require approval. If your field is formatted as a combo box, check box, or date, the match value will adjust appropriately for that type of input.

3. You can set the approval to only be required for certain categories by selecting one on the **Category** drop-down.

Once you have configured the value-based approvals, you need to enable approval on the approval tab of your eAdvance website configuration. More information on configuring eAdvance can be found in *EasyLobby eAdvance 10.4 Installation and Administration Guide* (PLT-03263).

A.6 Record formats

This section contains the record types used for importing data, and the field name orders required to successfully complete an import. For example, a site record must include the seven fields described in *Section A.6.12: Site data*, in the correct order, as shown in the diagram below:

	A	B	C	D	E	F	G
1	Site	{45C6560D-34BA-44B9-AB85-106E86265CDD}	Headquarters	11	Head Office, CA	sitemanager@acmehq.com	0
2	Site	{F28B86AD-E99C-42E4-917A-F8AFE3C61AC2}	Area99	99	Secret Research Unit	mrnobody@area99.gov	255
3							

1. Record Type 2. Id 3. SiteName 4. SiteId 5. Description 6. AdminEmail 7. Require Approval

A.6.1   Visitor data

When importing visitor data, a Record Type of *Visitor* must be used.

1. RecordType	36. UserDefined2
2. Id	37. UserDefined3
3. FirstName	38. UserDefined4
4. LastName	39. UserDefined5
5. SSN	40. UserDefined6
6. Title	41. UserDefined7
7. Company	42. UserDefined8
8. Address1	43. UserDefined9
9. Address2	44. UserDefined10
10. City	45. UserDefined11
11. State	46. UserDefined12
12. Zip	47. UserDefined13
13. Country	48. UserDefined14
14. Citizenship	49. UserDefined15
15. WorkPhone	50. UserDefined16
16. CellPhone	51. UserDefined17
17. Fax	52. UserDefined18
18. Email	53. UserDefined19
19. Website	54. UserDefined20
20. License	55. UserDefined21
21. LicenseExpiration	56. UserDefined22
22. DateOfBirth	57. UserDefined23
23. Employee	58. UserDefined24
24. Category	59. ApprovedBy
25. Reason	60. Status
26. Clearance	61. ProxCardNo
27. Site Id	62. Notes
28. Conference Room	63. PrintCount
29. ParkingSpaceId	64. ProxyPrint
30. Check In	65. InsuranceCo
31. Check Out	66. PolicyNumber
32. ValidFrom	67. CreationDate
33. ValidTo	68. ModifiedDate
34. RegisteredBy	69. CustomId
35. UserDefined1	

A.6.2   Employee data

When importing employee data, a Record Type of *Employee* must be used.

1. RecordType	33. UserDefined9
2. Id	34. UserDefined10
3. FirstName	35. UserDefined11
4. LastName	36. UserDefined12
5. Title	37. IsActive
6. EmailName	38. GateKeeper
7. Extension	39. Password
8. Address	40. LastChanged
9. Address2	41. NeverExpires
10. City	42. LockedOut
11. StateOrProvince	43. Approval
12. Region	44. Approver
13. PostalCode	45. Department
14. Country	46. Company
15. HomePhone	47. Category
16. WorkPhone	48. Site Id
17. GroupName	49. Parking Space
18. EmergencyContact	50. Building
19. EmergencyPhone	51. Floor
20. EmergencyExtention	52. Office
21. Pager	53. SSN
22. Fax	54. DateOfBirth
23. CellPhone	55. License
24. Website	56. LicenseExpiration
25. UserDefined1	57. InsuranceCo
26. UserDefined2	58. PolicyNumber
27. UserDefined3	59. Notes
28. UserDefined4	60. Status
29. UserDefined5	61. ProxCardNo
30. UserDefined6	62. LoginName
31. UserDefined7	63. CreationDate
32. UserDefined8	64. ModifiedDate

A.6.3   Asset data

When importing asset data, a Record Type of *Asset* must be used.

1. Record Type	9. UserDefined3
2. Id	10 UserDefined4
3. Name	11. UserDefined5
4. IdNumber	12. UserDefined6
5. Description	13. Site Id
6. Asset Type	14. CreationDate
7. UserDefined1	15. ModifiedDate
8. UserDefined2	16. CustomId

A.6.4   Asset loan data

When importing asset loan data, a Record Type of *AssetLoan* must be used.

1. Record Type	12. UserDefined4
2. Id	13. UserDefined5
3. Asset	14. UserDefined6
4. Employee	15. Site Id
5. VisitorId	16. Loaned Station
6. Loaned	17. Returned Station
7. Returned	18. LoanOperator
8. DueDate	19. ReturnOperator
9. UserDefined1	20. LongTerm
10. UserDefined2	21. CreationDate
11. UserDefined3	

A.6.5 Package data

When importing package data, a Record Type of *Package* must be used.

1. Record Type	15. UserDefined5
2. Id	16. UserDefined6
3. Carrier	17. TrackingNumber
4. Employee	18. Stored At
5. PackageFrom	19. Site Id
6. CheckIn	20. In Station
7. CheckOut	21. Out Station
8. Description	22. InOperator
9. Package Type	23. OutOperator
10. Quantity	24. Notes
11. UserDefined1	25. CreationDate
12. UserDefined2	26. ModifiedDate
13. UserDefined3	27. CustomId
14. UserDefined4	

A.6.6 Watch list data

When importing watch list data, a Record Type of *WatchList* must be used.

1. Record Type	13. Citizenship
2. Id	14. SpecialInstructions
3. FirstName	15. RejectionCount
4. LastName	16. AlwaysEnabled
5. Phone	17. StartDate
6. Cell	18. EndDate
7. Address1	19. Category
8. Address2	20. SiteId
9. City	21. License
10. State	22. Expiration
11. Zip	23. DateOfBirth
12. Country	24. Type

A.6.7　Lost and found data

When importing lost and found data, a Record Type of *LostAndFound* must be used.

1. Record Type	10. Site
2. Type	11. Found-at Station
3. Name	12. Claimed-at Station
4. Description	13. Checked in by
5. Claimer Type	14. Checked out by
6. Claimed By	15. Record Created
7. Found By	16. Record Modified
8. Claimed Time	17. LostAndFoundType
9. Found Time	18. InStation

A.6.8　Reason data

When importing reason data, a Record Type of *Reason* must be used.

1. Record Type	7. StartDate
2. Id	8. EndDate
3. ReasonForVisit	9. AllSites
4. ListOrder	10. AllUsers
5. Type	11. CreationDate
6. Code	12. ModifiedDate

A.6.9　Category data

When importing category data, a Record Type of *Category* must be used.

1. Record Type	6. AllSites
2. Id	7. AllUsers
3. Name	8. CreationDate
4. ListOrder	9. ModifiedDate
5. RequireApproval	

A.6.10 Clearance data

When importing clearance data, a Record Type of *Clearance* must be used.

1. Record Type	7. RequireApproval
2. Id	8. AllStations
3. Name	9. AllSites
4. ListOrder	10. AllUsers
5. Description	11. CreationDate
6. IdNumber	12. ModifiedDate

A.6.11 User account data

When importing user data, a Record Type of *Users* must be used.

1. Record Type	7. LockedOut
2. Id	8. SecurityLevel
3. UserName	9. Encrypted
4. Password	10. NTAuthentication
5. LastChanged	11. SiteId
6. NeverExpires	12. Description

A.6.12 Site data

When importing site data, a Record Type of *Site* must be used.

1. Record Type	5. Description
2. Id	6. AdminEmail
3. SiteName	7. RequireApproval
4. SiteId	

A.6.13 Station data

When importing station data, a Record Type of *Station* must be used.

1. Record Type	5. SiteId
2. Id	6. Description
3. Name	7. Enrollment
4. StationId	8. Application

A.6.14 Conference room data

When importing conference room data, a Record Type of *ConferenceRoom* must be used.

1. RecordType	6. ListOrder
2. Id	7. Description
3. Name	8. AllSites
4. RoomNumber	9. CreationDate
5. Capacity	10. ModifiedDate