



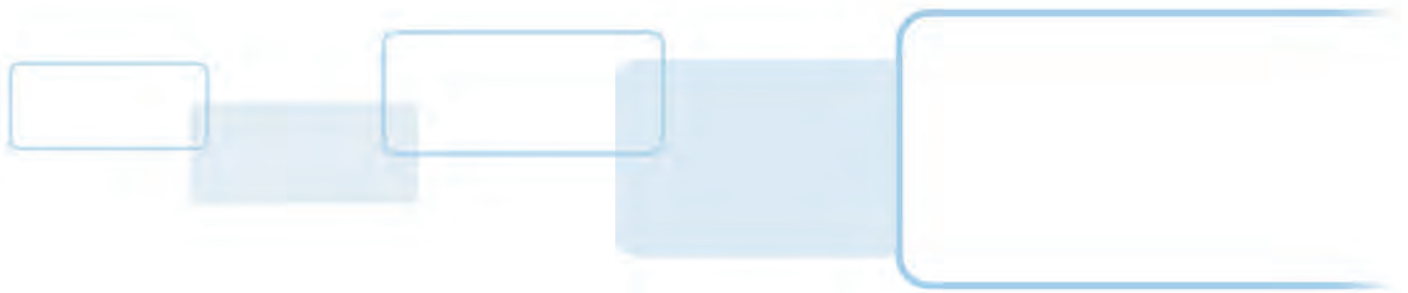
EASYLOBBY[®] SOLO

USER GUIDE

PLT-02607

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Chapter 1

Introduction

EasyLobby® Solo provides a simple, professional visitor management solution to replace the traditional paper guest book. EasyLobby Solo automates the processes of preregistration, visitor check in, badge printing, and reporting.

EasyLobby Solo is designed for a single workstation and requires minimal customization. It is easy to implement and can be personalized to create a professional impression for visitor scheduling and check in. Unlike a paper log, visitor information is kept confidential and secure. Only authorized users are able to access visitor information.

Users can preregister visitors to provide an effortless check in experience and anticipate who is visiting that day. Check in can be further streamlined through the use of identification scanners that extract and populate information from a business card or government issued ID. Knowing who is on the site provides a sense of security for employees and visitors. Reporting is simple and includes: visitor details, frequency, and current location status.

EasyLobby Solo also includes everything necessary to design a customized badge or sticker. It is compatible with a variety of badging options including FARGO® card printers to create an end-to-end visitor management solution.

When EasyLobby Solo is installed, two shortcuts are created on the desktop. The **EasyLobby Solo** shortcut sets up the visitor management system and is now referenced as the **Main Application**. The **EasyLobby Solo Self Registration** shortcut is used by visitors when checking in to a site. This shortcut is now referenced as the **Self Registration Module**.

1.1 System Requirements

EasyLobby Solo runs on 32- and 64-bit Microsoft Windows Operating Systems, versions 7, 8, 8.1, and 10.0.

1.2 Device Integration

EasyLobby Solo is compatible with the following devices:

- FARGO: C50, DTC1000Me, DTC1250e, DTC4250e, DTC5500LMX, HDP5000, and HDP5600 printers
- DYMO 450 Turbo black and white thermal badge printer
- Acuant SnapShell R2 and ScanShell 1000B scanners
- AssureTec ID-150 and ID-150A scanners
- Topaz SignatureGem LCD 1x5 (signature block only) and 4x5 signature pads
- Metrologic MS9520 Voyager barcode scanner
- Logitech C920 PTZ and web cameras installed with a valid Windows driver compatible with your operating system
- Honeywell: Xenon 1902 wireless area imaging scanner and Genesis 7580g area imaging scanner



Chapter 2

EasyLobby Solo Quick Start

2.1 Prerequisites

Note: It is recommended that users install and run EasyLobby Solo using Windows administrator privileges on the workstation.

The installation for EasyLobby Solo includes the following additional platform and third-party software:

- .NET Framework 4.5.2 software framework
- SQL Server Express 2014 data management system
- Crystal Reports report generation program
- Asure ID card personalization software

As the EasyLobby installation begins, the presence of all software is checked and any missing elements are installed. The time needed to install EasyLobby Solo varies based on the prerequisites and existing software.

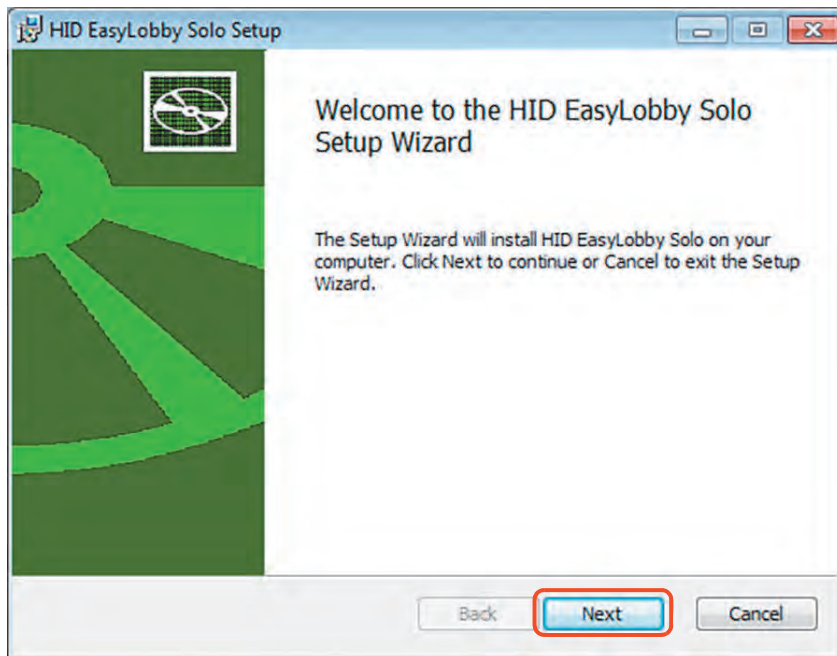
2.2 Software Installation

1. Load the CD.
2. If the installation does not automatically launch, double-click the **EL11Solo_setup.exe** file.

3. Read the license terms and conditions. Select **I agree to the license terms and conditions** and click **Install**.



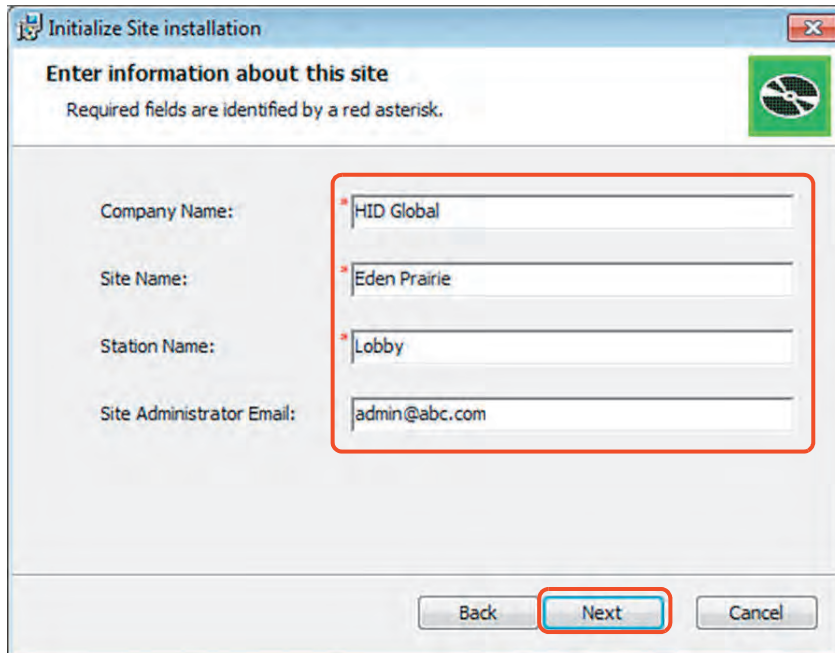
4. Click **Next**.



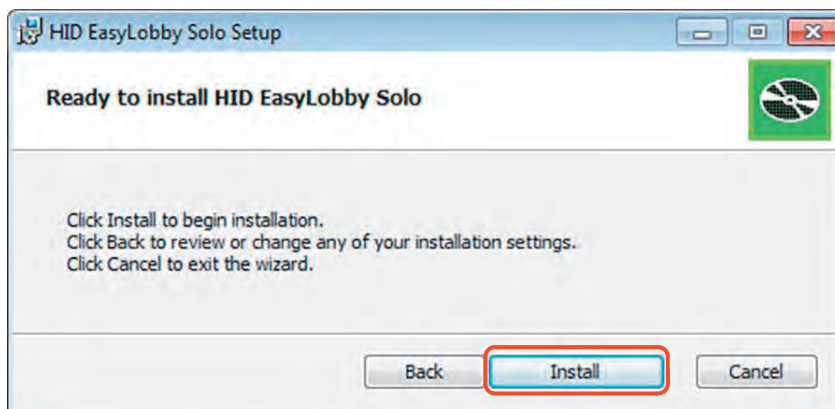
5. Enter your **Company Name**, **Site Name**, **Station Name** and **Site Administrator Email**.
6. Click **Next**.

This information is used to populate fields within EasyLobby Solo. If necessary, these fields can be updated after the installation is completed by navigating to the **Help > ABOUT > About** window.

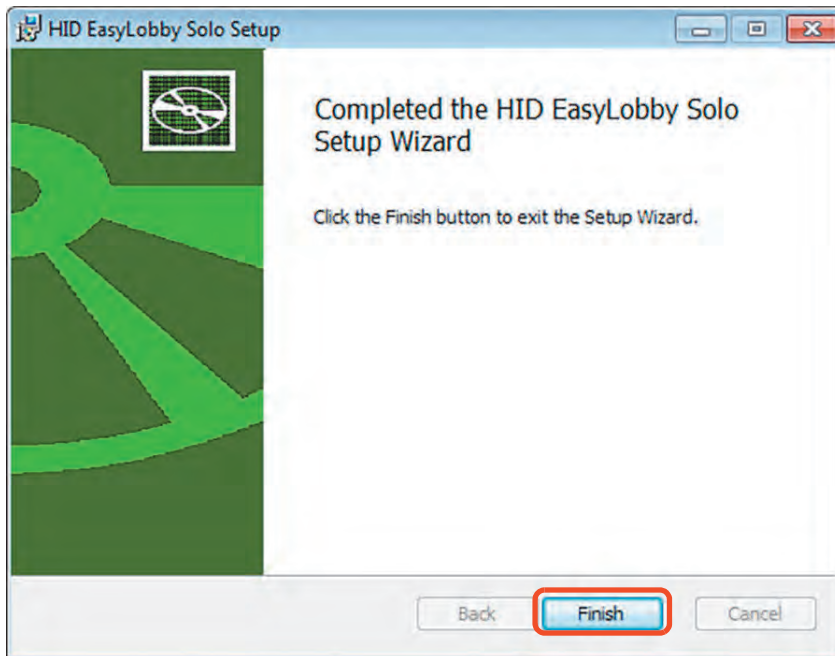
The **Site Administrator Email** is the address that an **Alert Email** is sent to. See *Section 4.3: Send an Email Alert* for information on sending an alert email. See *Section 6.4: Update Email Settings* to specify additional email addresses.



7. Click **Install**.



- Click **Finish** to exit the Setup Wizard.



- Click **Close** when the successful installation message is displayed.

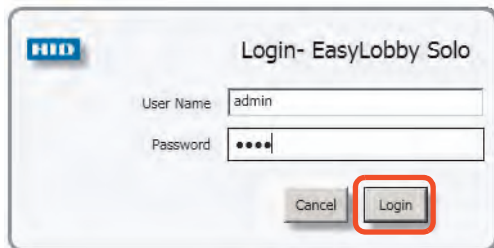
When the installation has completed, the following shortcuts are placed on the desktop:

- **EasyLobby Solo:** This shortcut opens the **EasyLobby Solo Main Application** which is used to configure and monitor the EasyLobby Solo visitor management system.
- **EasyLobby Solo Self Registration:** This shortcut opens the **Self Registration Module** which is for visitor registration access.

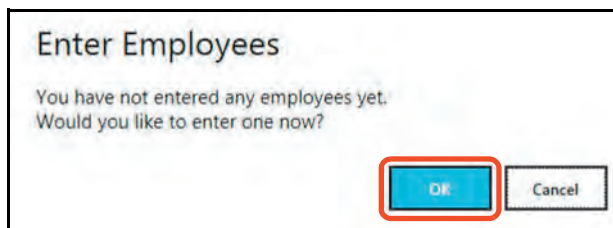
2.3 Launch EasyLobby Solo

1. Double-click the EasyLobby Solo **Main Application** shortcut on the desktop.
2. Log in with the following default credentials:
 - **User Name:** admin
 - **Password:** pass

Note: For security reasons, HID recommends to change the default password. For more information, see *Section 10.1.2: Modify a User*.



3. The Main window is displayed with a prompt to enter employees.
 - Click **OK** to optionally start adding employees. See *Section 3.3.3: Employee Menu* for information on adding an employee.
 - Click **Cancel** to proceed to the Main window.



2.4 Add a Device

EasyLobby can be set up with cameras, printers, scanners, and readers for a complete visitor monitoring system.

See *Chapter 8: Device Options* for detailed information.

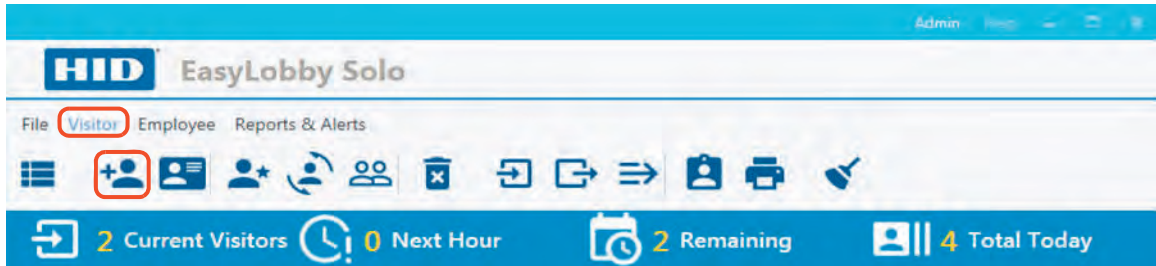
2.5 Set Up the Self Registration Module

The **Self Registration Module** is set up to function out of the box.

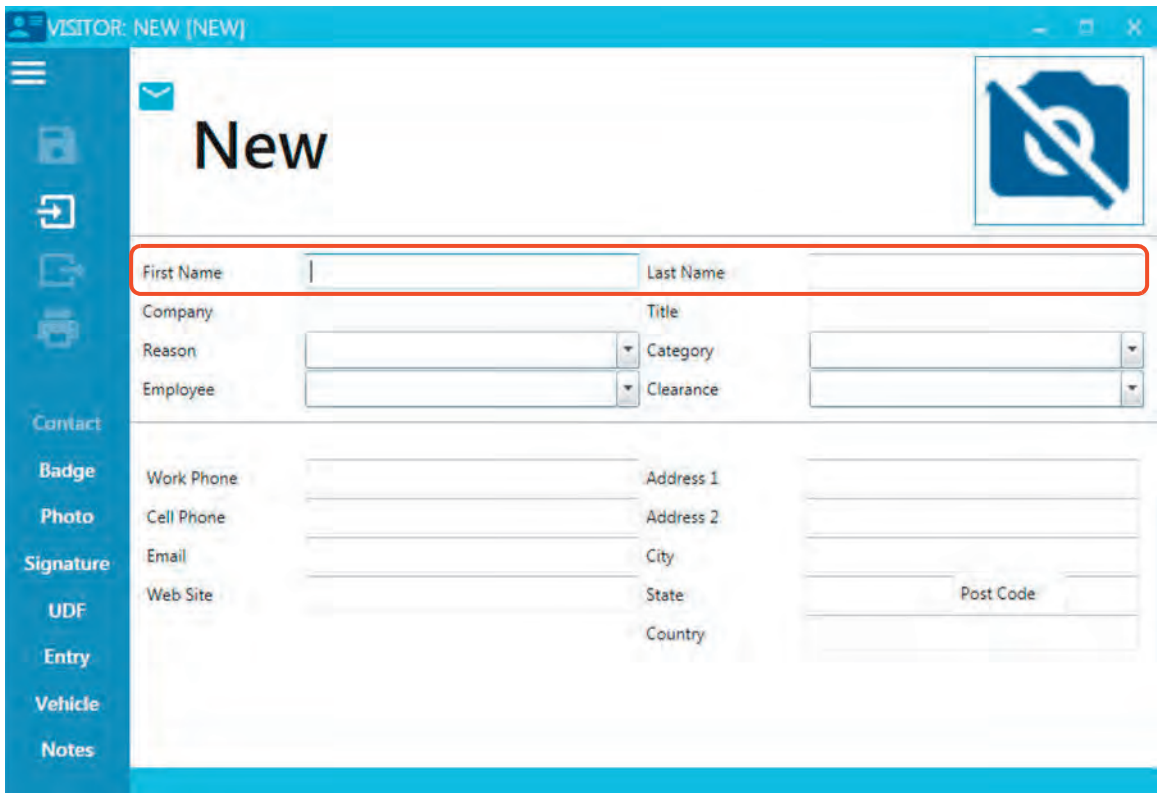
To customize the **Self Registration Module**, see *Chapter 9: Self Registration Configuration*.

2.6 Schedule a Visitor

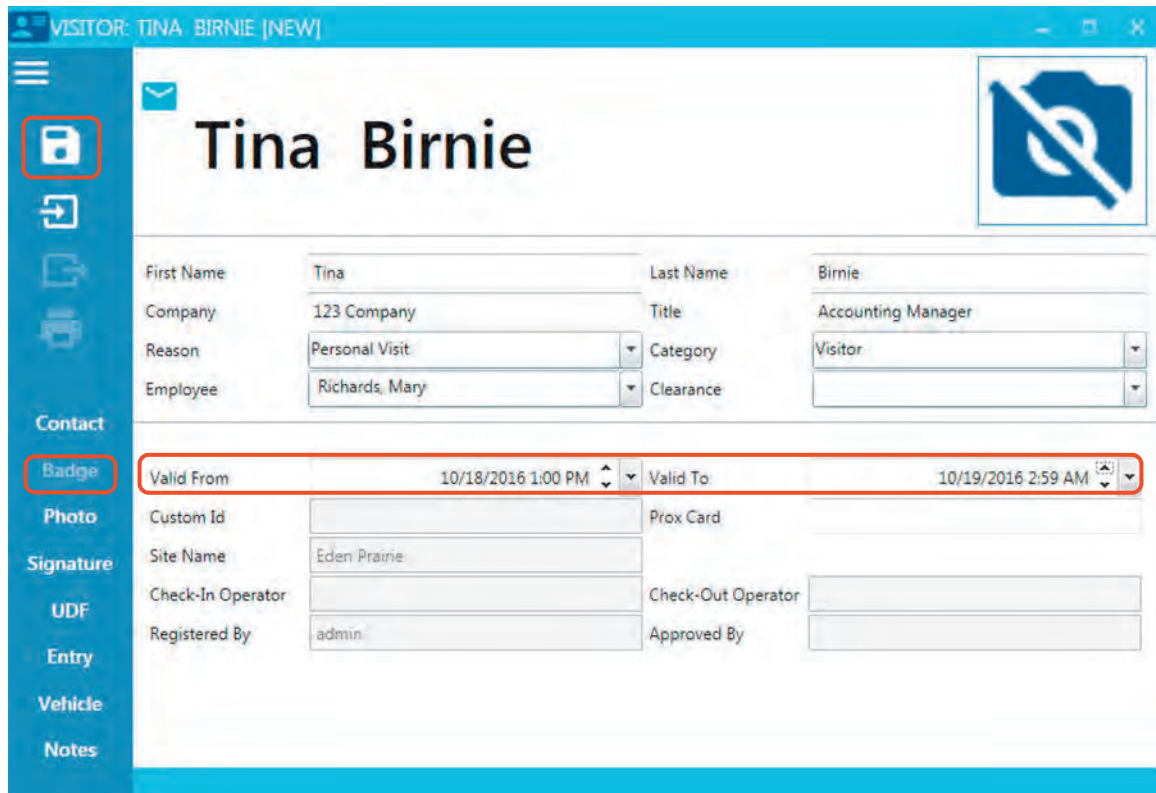
1. Select the **Visitor** > **Create a new Visitor record** icon.



2. Enter the visitor information. The required fields are **First Name** and **Last Name**.



3. Enter the time of the scheduled visit on the **Badge** tab.
 - a. Select the **Badge** tab.
 - b. Enter the date and time for the **Valid From** and **Valid To** fields.
 - c. Click **Save**.



VISITOR: TINA BIRNIE [NEW]

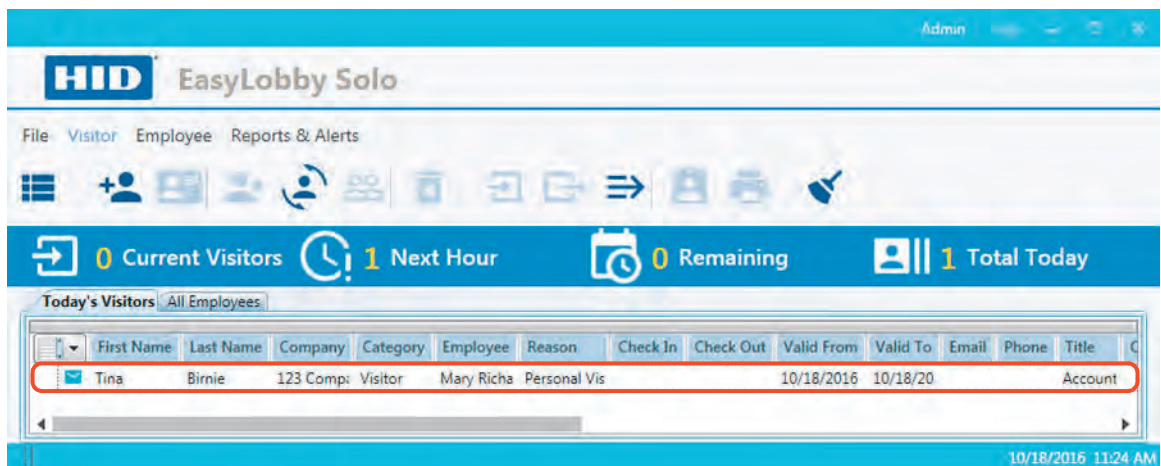
Tina Birnie

First Name: Tina Last Name: Birnie
 Company: 123 Company Title: Accounting Manager
 Reason: Personal Visit Category: Visitor
 Employee: Richards, Mary Clearance:

Badge Valid From: 10/18/2016 1:00 PM Valid To: 10/19/2016 2:59 AM

Custom Id: Prox Card:
 Site Name: Eden Prairie
 Check-In Operator: Check-Out Operator:
 Registered By: admin Approved By:

4. The visitor is listed as preregistered. This is indicated by the blue envelope icon beside the name.




Admin

HID EasyLobby Solo

File Visitor Employee Reports & Alerts

0 Current Visitors 1 Next Hour 0 Remaining 1 Total Today

Today's Visitors | All Employees

	First Name	Last Name	Company	Category	Employee	Reason	Check In	Check Out	Valid From	Valid To	Email	Phone	Title
	Tina	Birnie	123 Comp	Visitor	Mary Richa	Personal Vis			10/18/2016	10/18/20			Account

10/18/2016 11:24 AM

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Chapter 3

General Operation

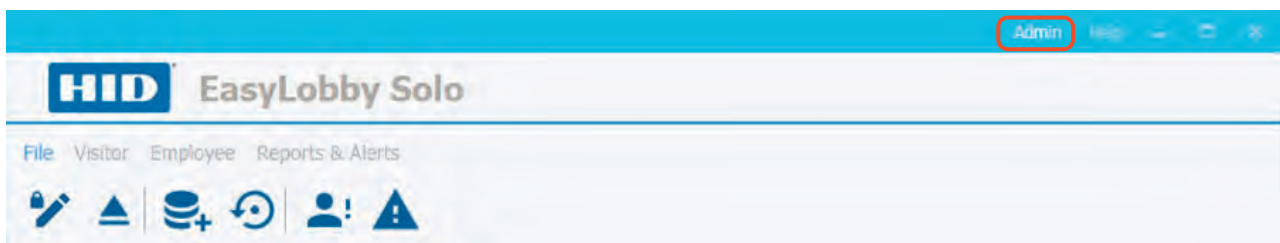
This chapter covers the general operation of EasyLobby Solo. This includes visitor management and employee management.

3.1 User Profile Types

There are two user profile types available: Administrator and Operator. Depending on which type logs into EasyLobby Solo, directly affects the items displayed on the Main window.

- **Administrator:** This user has access to all features and functions, including changing settings system-wide, and managing other user accounts.
- **Operator:** This user has limited access. An operator can:
 - Create new visitor records
 - Schedule visitors
 - View visitor status
 - Check visitors in/out
 - View Watch List Thumbnails
 - Print badges
 - View employees
 - Launch an alert
 - Run an evacuation report

Administrator View



Operator View



3.2 Main Window

After logging into the **Main Application**, the Main window is displayed. This window allows an administrator to customize EasyLobby Solo to fit their site's specific needs. Once set up, any user can monitor and manage visitors at the company site.



3.2.1 Visitor Status Bar

The Visitor Status bar is displayed under the standard menus. This status bar provides a quick summary of the visitors at the site and those that are expected on the site.



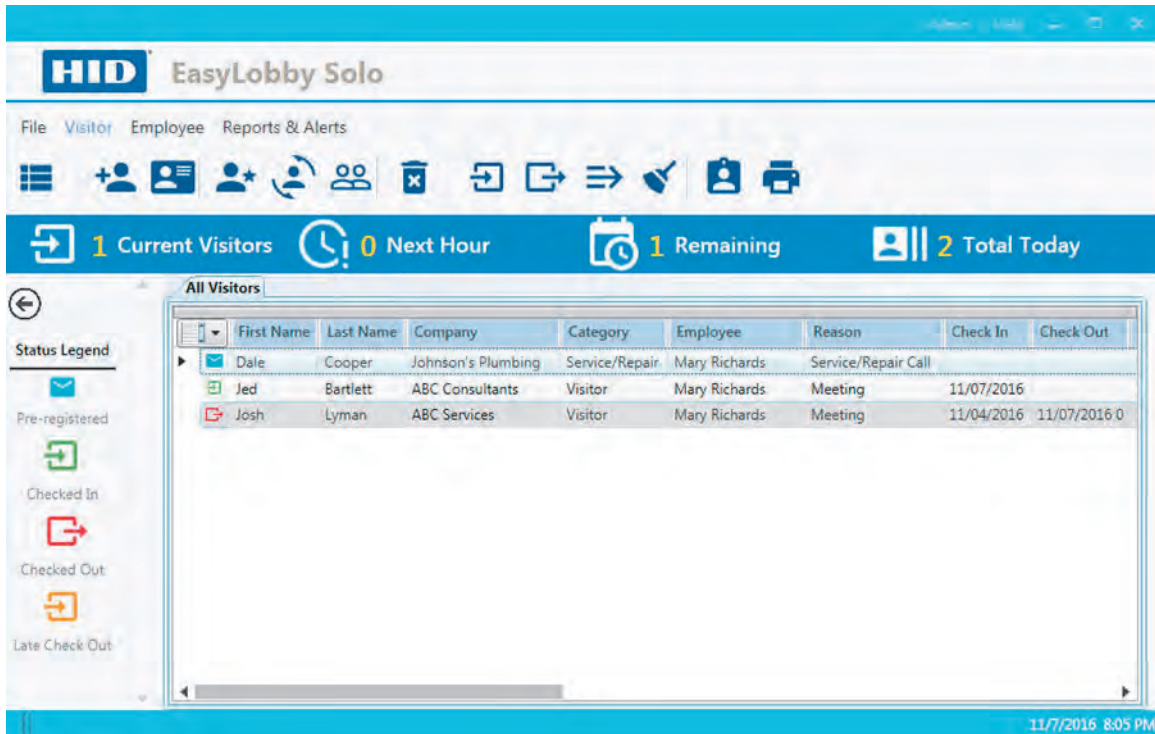
Icon	Function
Current Visitors	The number of visitors currently checked in. A user can click this selection to display the Current Visitors grid view. See <i>Section 3.3.2.1: Add a Grid View</i> .
Next Hour	The number of visitors that are expected within the next hour.
Remaining	The number of visitors that are expected for the remainder of the day.
Total Today	The total number of visitors scheduled for the day.



3.2.2 Visitor Status Legend

The visitor status legend is a hidden field that can be displayed to show the representation of the visitor status icons.

On a visitor grid view, right-click anywhere on a visitor name. From the menu, select **Show status icon legend**.

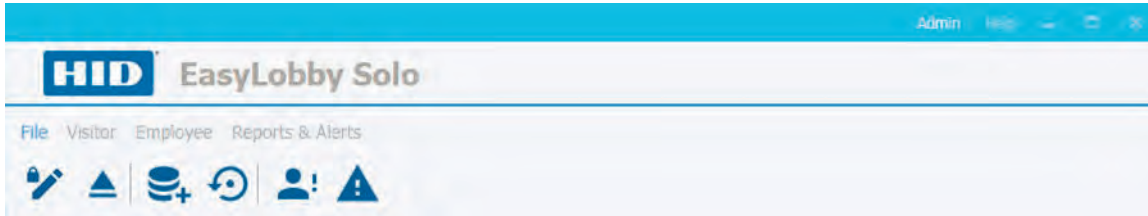


3.3 Menu Bar

When one of the Menu bar items is selected, the corresponding submenus display.

3.3.1 File Menu

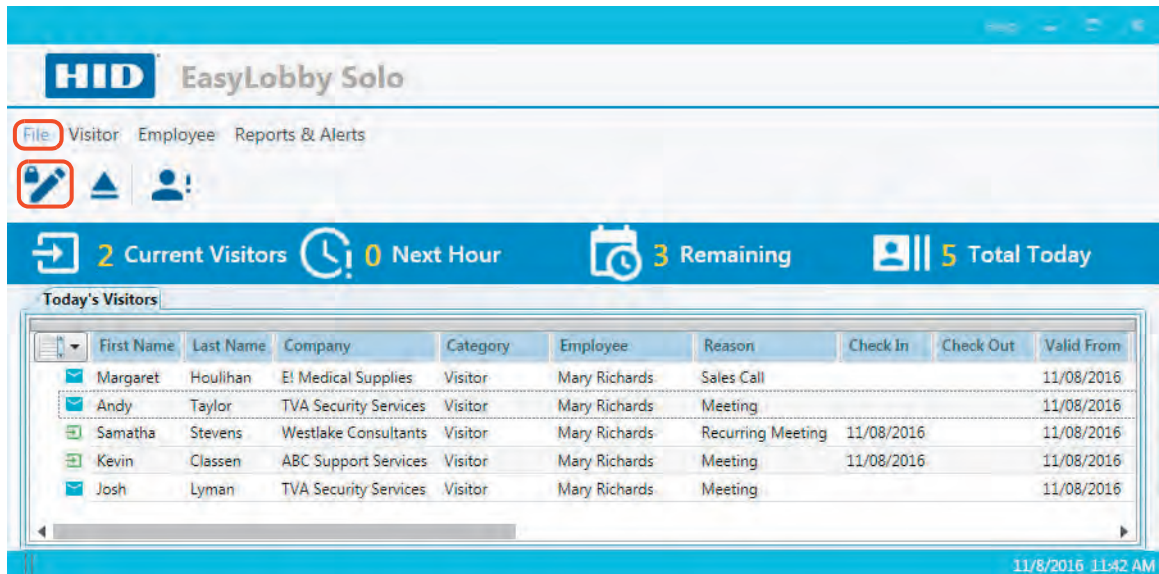
The **File** menu allows a user to perform the following tasks:



Icon	Operator	Administrator	Function
	✓	✓	Change user password. Note: Administrators can edit other users passwords through the Admin menu. See <i>Section 3.3.1.1: Change Your Password.</i>
	✓	✓	Logout and then log in as another user. The user can log out and another user can immediately log in to EasyLobby Solo.
		✓	Backup database to file. Backs up the current database to a file. See <i>Section 3.3.1.2: Backup Database to File.</i>
		✓	Restore database from file. Restores a database from a previously saved backup file. See <i>Section 3.3.1.3: Restore Database From File.</i>
	✓	✓	Watch List Thumbnails. Displays all the names and categories of the visitors on the watch lists. See <i>Section 3.3.1.4: Watch List Thumbnails.</i>
		✓	Add To Watch List. Adds individuals or groups to a watch list. See <i>Section 3.3.1.5: Add to Watch List.</i>

3.3.1.1 Change Your Password

1. Select the **File** > **Change your password** icon.



2. Enter your **Old Password**, a **New Password**, and re-enter the new password according to the listed requirements. These requirements are specified by the administrator in the Program Options. See *Section 6.5: Customize Security Options*.
3. Click **Change Password**.



CHANGE YOUR PASSWORD

The password must meet the following complexity requirements:

1. It must have at least 4 characters long.
2. It must have at least one lower-case character.
3. It must have at least one upper-case character.
4. It must have at least one number.

Old Password: [password masked with dots]

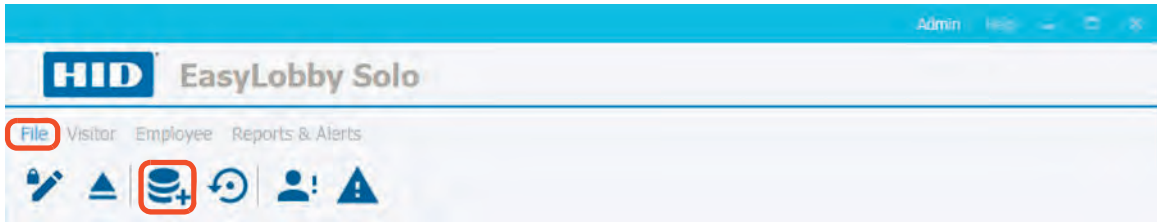
New Password: [password masked with dots]

ReType Password: [password masked with dots]

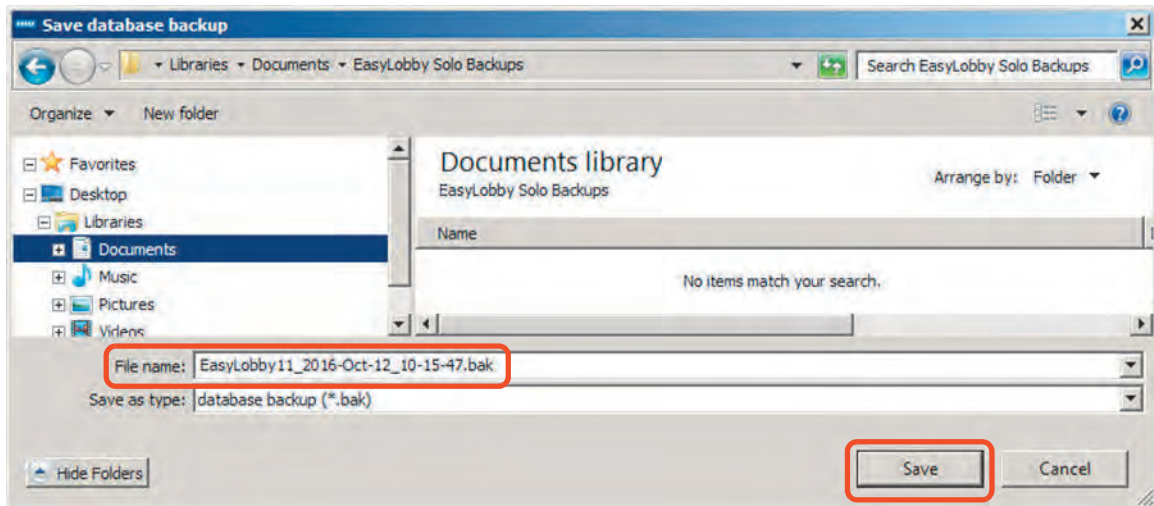
Buttons: Cancel, Change Password

3.3.1.2 Backup Database to File

1. Select the **File** > **Backup database to file** icon.



2. Navigate to the location to save the file. Enter a **File name** and click **Save**.



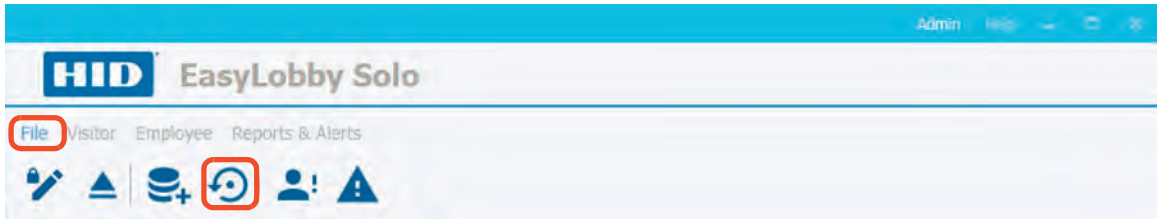
3. Click **OK**.

Note: Any data or configuration updates made to the database after a backup file is created are lost.

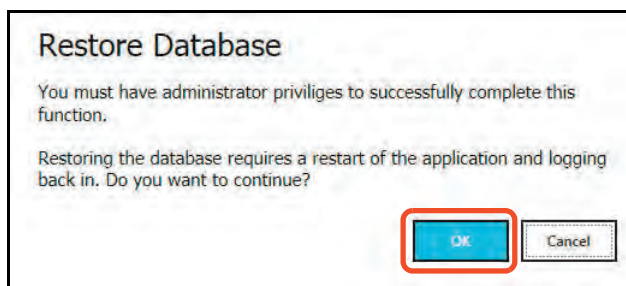
3.3.1.3 Restore Database From File

Note: Any data or configuration updates made to the database after a backup file is created are lost.

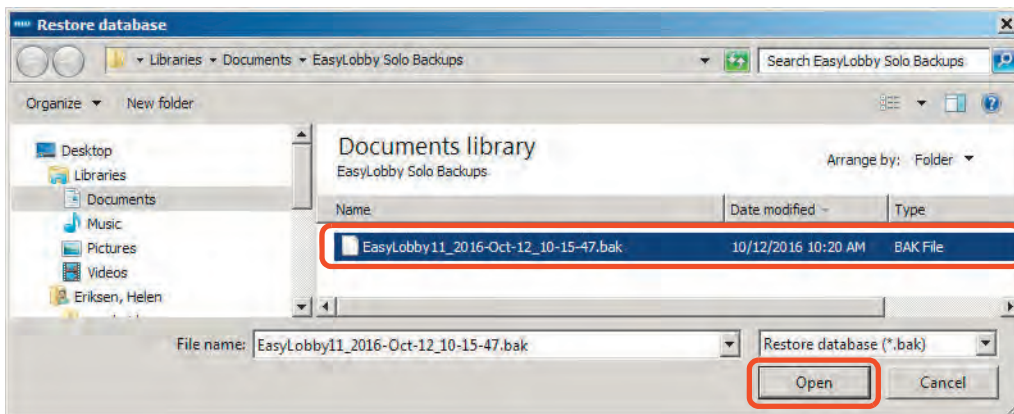
1. Select the **File > Restore database from file** icon.



2. Click **OK**.



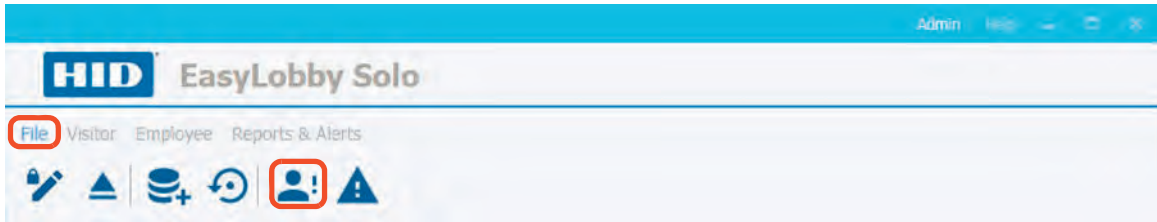
3. Select the file to restore and click **Open**.



4. Click **OK** when the database is restored.
5. Click **OK** to restart.

3.3.1.4 Watch List Thumbnails

1. Select the **File** > **Watch List Thumbnails** icon.



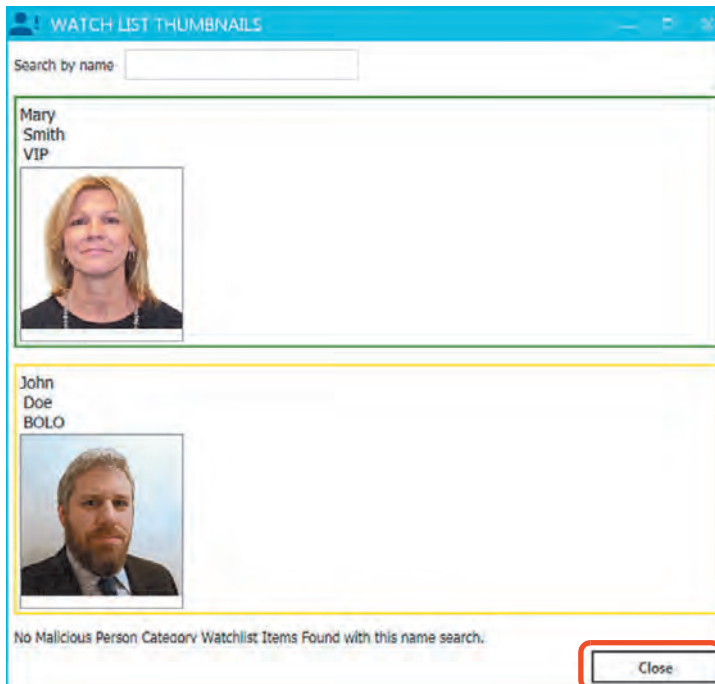
2. The **WATCH LIST THUMBNAI**S window is displayed with all the names and categories of the visitors on the watch lists.

The categories are color coded:

- Green = VIP
- Yellow = BOLO (Be On the Look Out)
- Red = Malicious person

This list can be searched by entering the start of a name in the **Search by name** box. Any watch list item for Last Name, First Name, or Company Name that matches the search entry is displayed.

3. Double-click on an individual on the list to open an overview thumbnail of the individual.
4. Click **Close** when finished.



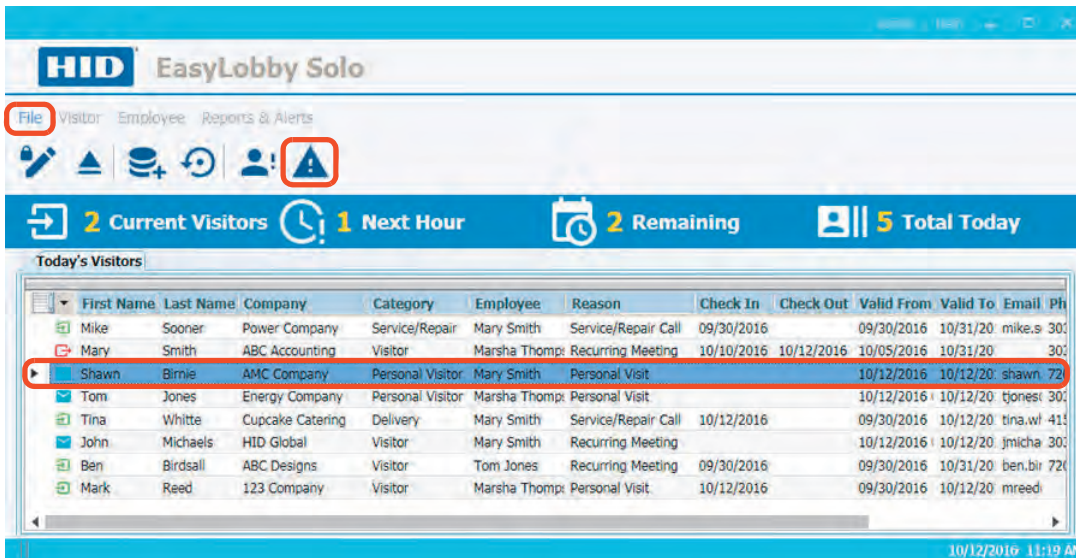


3.3.1.5 Add to Watch List

From the list of visitors, a user can select a visitor name and add it to a watch list. Watch lists are useful to identify both VIPs and visitors you may not want admitted to the site. When a person listed on a Watch List checks in to the site, an alert is sent to a site administrator and access may be restricted.

Each name on a watch list includes a status that represents the length of time the item remains active on the Watch List.

1. Select a name from the visitor list to place on the watch list.
2. Select the **File > Add to Watch List** icon.

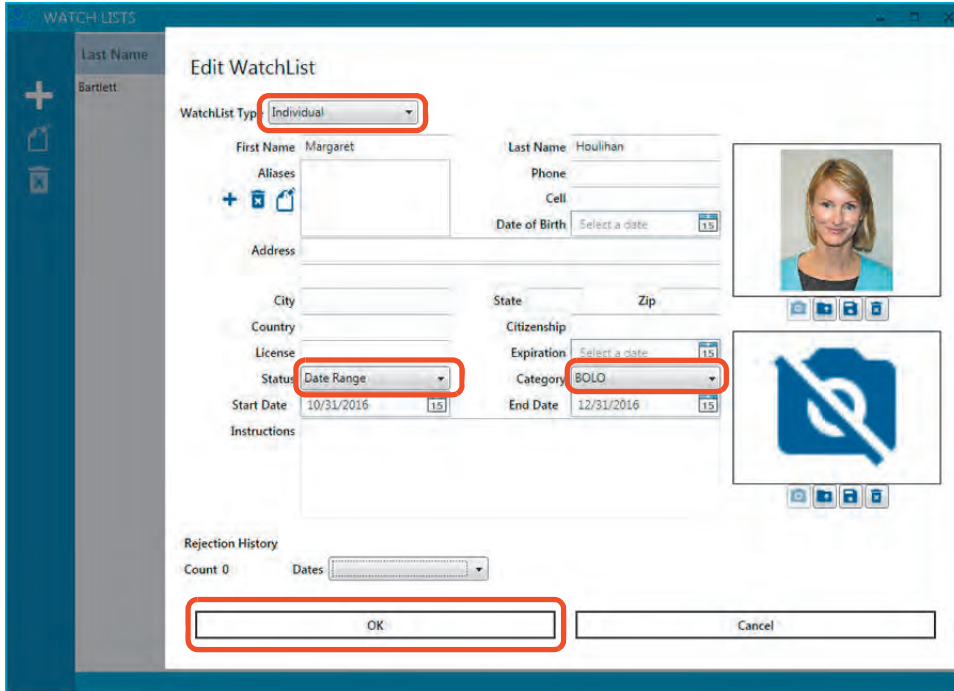


3. Select the **Watch List Type** and complete these fields:

Field	Description
Watch List Type	
Individual	Specifies a single person. Required fields are Last Name and Category .
Company	Specifies visitors from a specific company. Required fields are Company and Category .
Country	Specifies all visitors from a specific country. Required fields are Country and Category .
Status	
Permanent	Keeps this visitor on this watch list indefinitely. This visitor or group of visitors can be manually removed by setting the status to Disabled.
Date Range	Sets this visitor or group of visitors to remain on the watch list from the start date until the end date where they are automatically set to Disabled.
Disabled	Specifies that this visitor or group of visitors is no longer on a watch list.
Category	
VIP	Very Important Person. Specifies a person who is granted special privileges due to their status or importance.

Field	Description
BOLO	Be On the Look Out. Specifies a wanted suspect or person of interest.
MALICIOUS PERSON	Specifies a person having or showing a desire to cause harm to others.

4. Click **OK**.
















5. The individual is added to the list. See *Section 3.3.1.4: Watch List Thumbnails*.

3.3.2 Visitor Menu

The Visitor menu manages the creation of Visitor forms, maintenance, and actions.

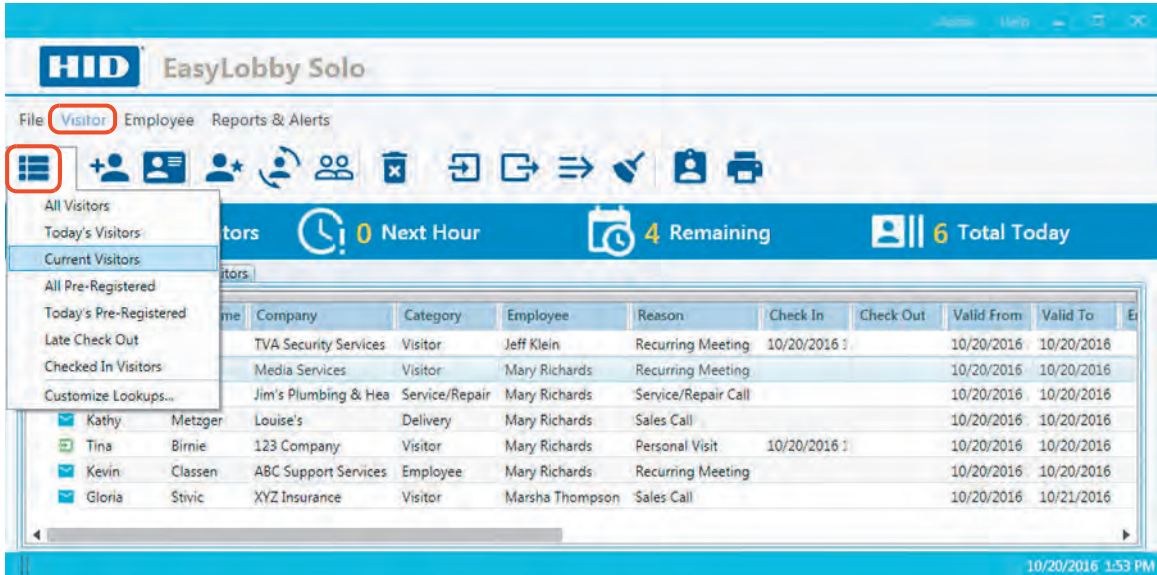


Icon	Operator	Administrator	Function
	✓	✓	Add a tab to the grid view. This allows the user to customize the lists shown below the status bar. See <i>Section 3.3.2.1: Add a Grid View</i> .
	✓	✓	Create a new Visitor record. See <i>Section 3.3.2.2: Create a New Record</i> .
	✓	✓	Open the Visitor Form for the selected visitor. See <i>Section 3.3.2.3: Open a Form</i> .
	✓	✓	Clone current selection. This option copies the selected Visitor form. The form can then be edited and saved as a new visitor. See <i>Section 3.3.2.4: Clone Current Selection</i> .
	✓	✓	Returning visitor. This option opens the Returning Visitor Lookup window where the visitor can be searched in the history by name or company and additional visit information can be entered. See <i>Section 3.3.2.5: Returning Visitor</i> .
	✓	✓	Visitor from same company. This option opens the New Visitor window with the company information duplicated from the selected visitor. See <i>Section 3.3.2.6: Visitor From Same Company</i> .
		✓	Delete the current visitor record. This option removes the record from the database. See <i>Section 3.3.2.7: Delete the Current Record</i> .
	✓	✓	Check In. This option checks a visitor in to the site. See <i>Section 3.3.2.8: Check In a Visitor</i> .
	✓	✓	Check Out. This option checks a visitor out of the site. See <i>Section 3.3.2.9: Check Out a Visitor</i> .
	✓	✓	Check out visitor from Custom ID. This option allows a user to check out a visitor with a barcode or a Custom ID number. See <i>Section 3.3.2.10: Check Out a Visitor By Custom ID</i> .
	✓	✓	Check Out All. This option checks out all the visitors at one time. See <i>Section 3.3.2.11: Check Out All Visitors</i> .
	✓	✓	Preview badge. This option displays a preview of the badge for the selected visitor. See <i>Section 3.3.2.5: Returning Visitor</i> .
	✓	✓	Print badge. This option prints the badge of the selected visitor. See <i>Section 3.3.2.13: Print a Badge</i> .

3.3.2.1 Add a Grid View

The grid view is the main screen to display visitor or employee lists. The user can display all visitors, today’s visitors, or other user-specified lists as well as employee lists. After selecting a list from the pull-down menu, a tab is created on the Main window. Multiple tabs can be displayed and the user can select them as needed. This example shows the visitor grid view.

1. Select the **Visitor > Add a visitor grid view** icon.
2. Select an option from the menu.

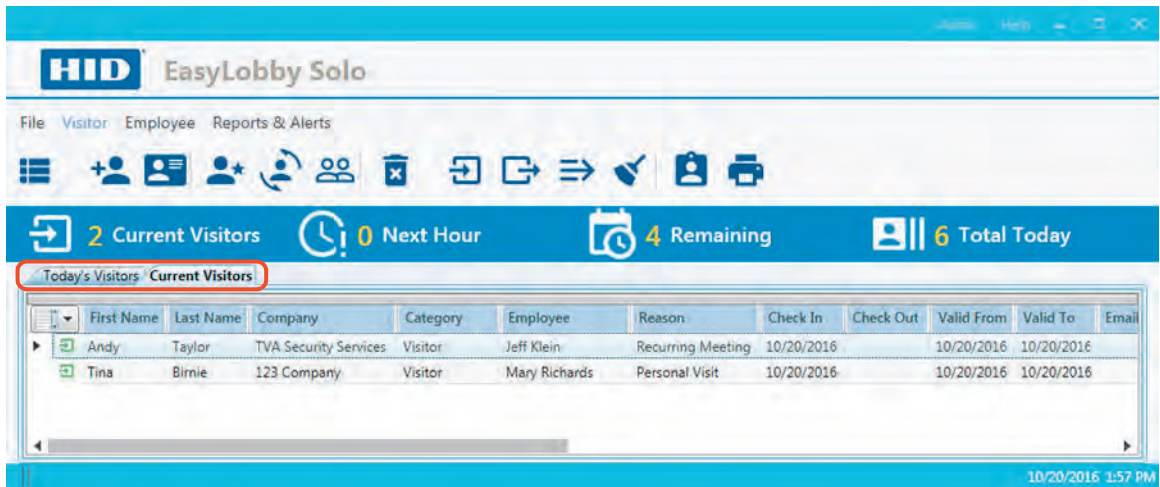


List	Description
Visitor	
All Visitors	Lists all visitors.
Today's Visitors	Lists all visitors who are preregistered, checked in, and checked out for today's date.
Current Visitors	Lists all visitors who are checked in and have not checked out.
All Pre-registered	Lists all visitors who are preregistered. These visitors have not checked in.
Today's Pre-registered	Lists all visitors who are preregistered for today. These visitors have not checked in.
Late Checkout	Lists the visitors that are still in a checked in status, but their Valid To time has elapsed. They may have left the site without checking out at the lobby station or their meeting may have run over the scheduled time and they are still within the site.
Checked in Visitors	Lists all visitors who have checked in.
Customized Lookups	Allows the user to define fields to search for a visitor.
Employee	
All Employees	Lists all employees.



List	Description
Active Employees	Lists all employees who are not marked as inactive on the Employee form.
Inactive Employees	Lists all employees who are marked inactive on the Employee form.
Customized Lookups	Allows the user to define fields to search for an employee.

3. The new tab is displayed. This example shows two visitor tabs.

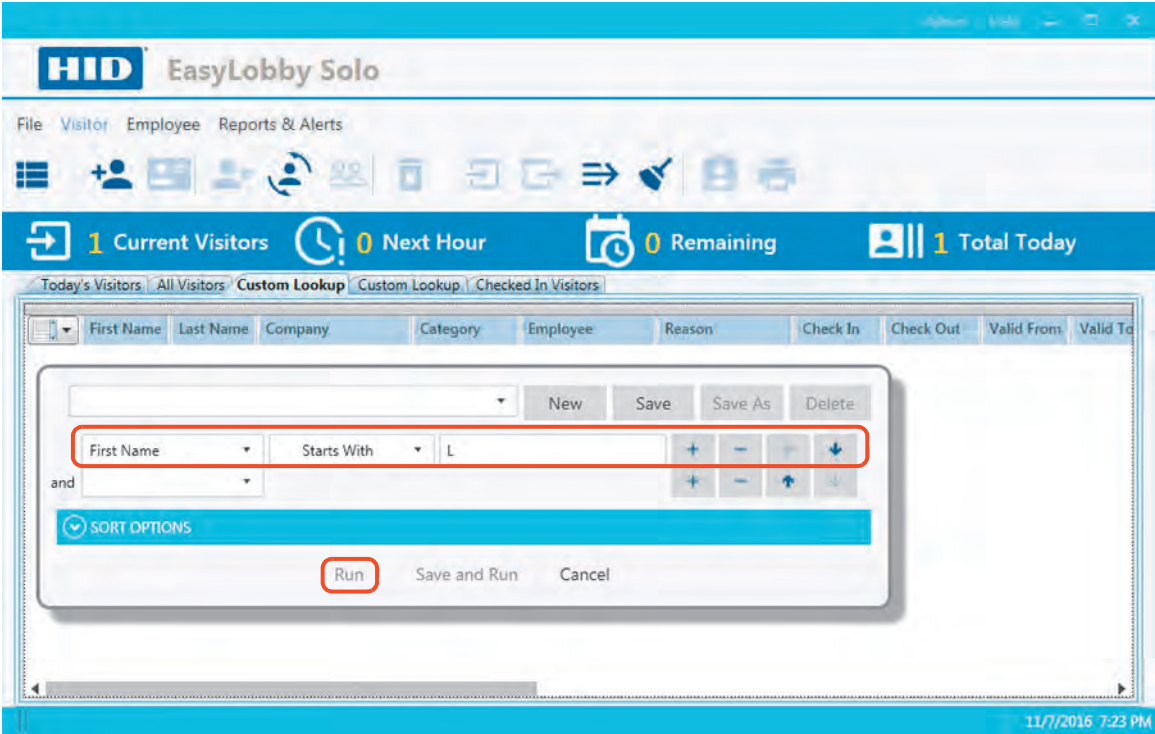


Note: Right-click in the tab area for additional options.

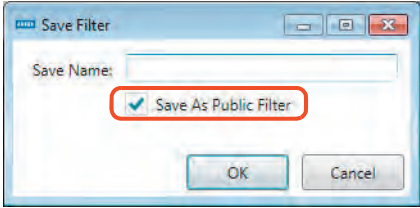
3.3.2.1.1 Customize Lookups

Within the Employee and Visitor grid view is an option to perform a targeted search to find and display specific information.

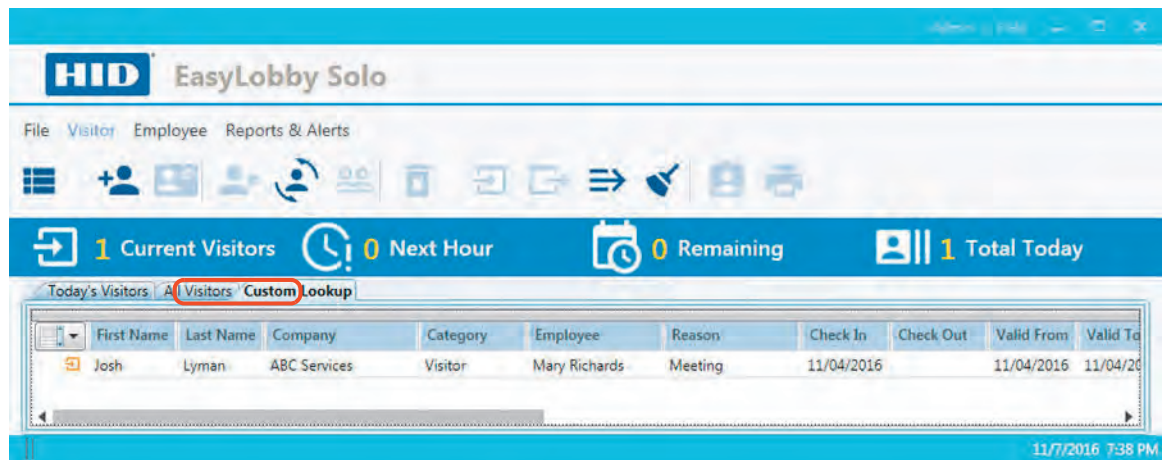
1. Select **Customize Lookups** from the **Visitor > Add a visitor grid view** icon.
2. Use the drop-down lists to select a data field and a qualifier for your search. Then enter the search text. To further define your search, select the controls to add or remove fields. Click **Run**.



3. Click one of the following:
 - **Save:** Prompts the user to name the search filter and save it for future use. The user can also select the **Save As Public Filter** check box to allow other users to utilize this search filter when using EasyLobby Solo.



- **Run:** Displays a grid view with the results of the search and is automatically named Custom Lookup.



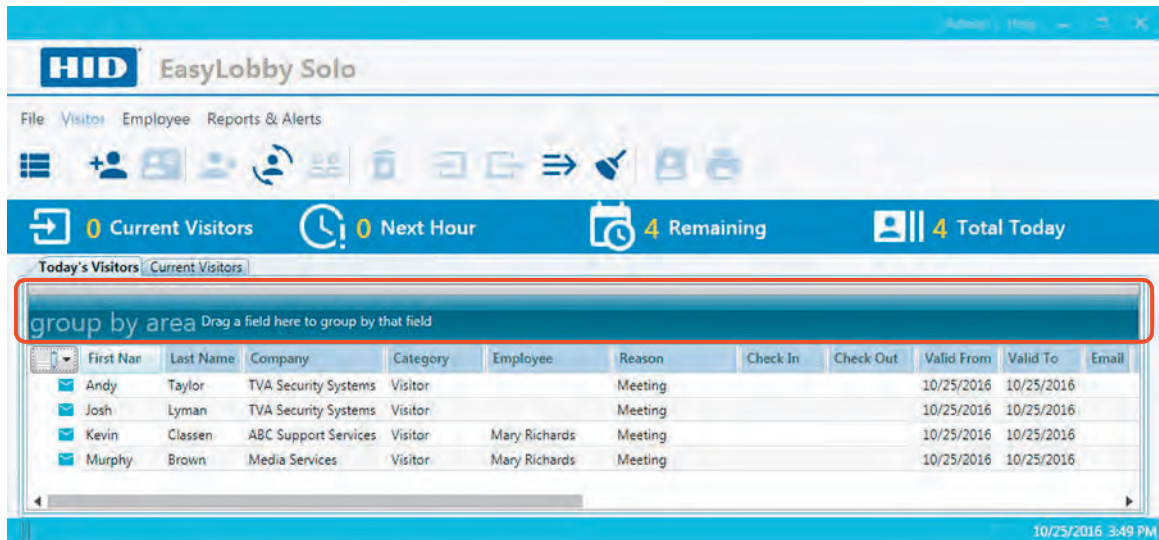
- **Save and Run:** Prompts the user to name the search filter and displays the grid with the search results.

3.3.2.1.2 Open the Group By Area

The group by area is a hidden field that is used to create customized groupings of the columns in the visitor or employee grid views.

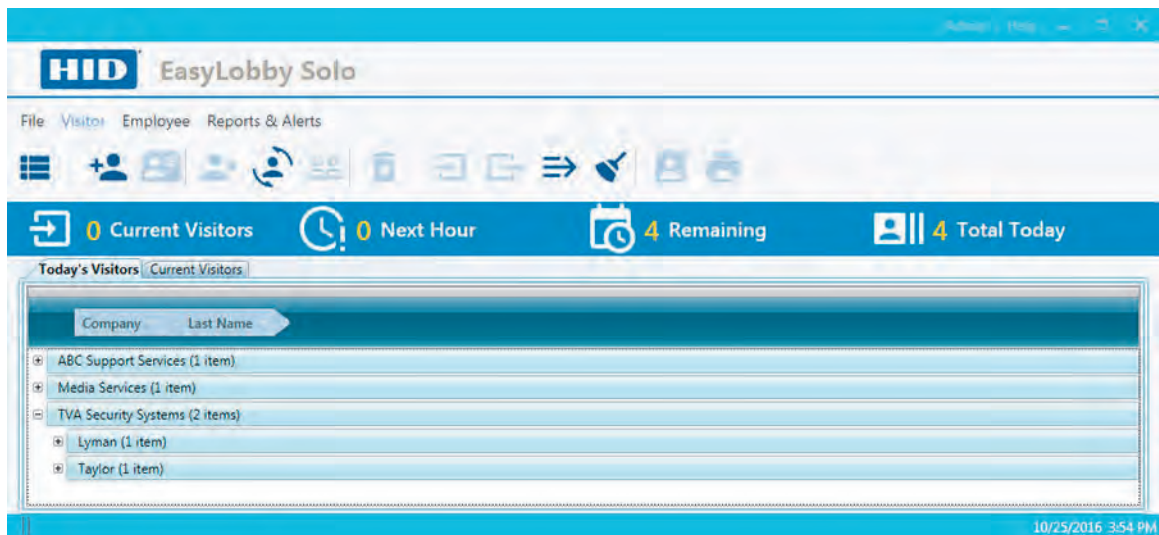
1. Click the narrow bar below the tabs of the grid view to open the **Group By Area**.

The area opens for the user to drag-and-drop column headings of the grid view to the **Group By Area**.



2. As headings are added and rearranged, the window immediately reflects the change.
 - To add additional headings to the area, open one of the groupings to show the headings.
 - To remove headings from the grouping, drag and drop a heading to the display pane.

This example shows the visitors grouped by **Company** and by **Last Name**.



3. Click the bar again to close the **Group By Area**.

3.3.2.2 Create a New Record

The Visitor and Employee forms contains all the information needed to use EasyLobby Solo. The information collected and contained in these forms is used throughout the visitor management system to record visitors to the site and maintain employee information as needed. This example shows the creation of a visitor record.

1. Select the **Visitor > Create a new Visitor record** icon.



2. Enter the Visitor information and click the **Save** icon at any time.

Required fields are **First Name** and **Last Name**. The contents of the Reason, Category, and Clearance drop-down lists are set up by an administrator in the Visitor Lists. See *Chapter 5: Visitor, Employee, and Other Lists* for more information.

Note: There are tabs on the left pane of the window. These tabs are set up by an administrator in the Program Options. See *Section 6.6: Customize Visitor Form Fields*. When visitors are manually entered, these tabs allow the user to add additional information about the visitor. When a visitor checks in to the site, much of the information can be automatically acquired by scanning a government issued ID or the visitor’s business card. All of the information shown here may not be required for the site.

Tab	Description
Contact	Defines the contact information for this visitor or employee.
Badge	This tab is on the Visitor form only. This tab includes the date and time the visitor is approved to be on site (Valid From/Valid To fields) which can be printed on the visitor badge. The Custom ID is also recorded here. The Custom ID is a unique ID assigned to each visitor to track them in the database even if their First Name or Last Name or other identifying details are changed over time. The Custom ID is assigned to a visitor at the time of their first check in.
Location	This tab is on the Employee form only. The physical location of the employee’s work area.
Emergency Contact	This tab is on the Employee form only. The contact information in case of an emergency involving the employee.
Photo	The visual identification of a visitor and employee. The scanned images allowed here are defined by the scanner setup in <i>Section 8.2.1: ID Scanner</i> .



Tab	Description
Signature	This tab is on the Visitor form only. The visitor signature at the time of check in. For more information see <i>Chapter 5: Visitor, Employee, and Other Lists</i> .
UDF	This tab is on the Visitor form only. These are user-defined fields established by an administrator. For more information see <i>Section 6.2: Customize Form Fields</i> .
Entry	This tab is on the Visitor form only. This is the history of a visitor. Once a visitor has checked in and checked out through EasyLobby Solo, a record is established.
Vehicle	This is information about a visitor or employee vehicle.
Notes	This is any additional information needed about a visitor or employee.

3. Select the **Badge** tab to enter the information for when the visitor is approved to be on site. The **Valid From** and **Valid To** dates show the scheduled date and time for the visit.
Note: When preregistering a visitor, these are future dates/times.

VISITOR: GLORIA STIVIC [NEW]

Gloria Stivic

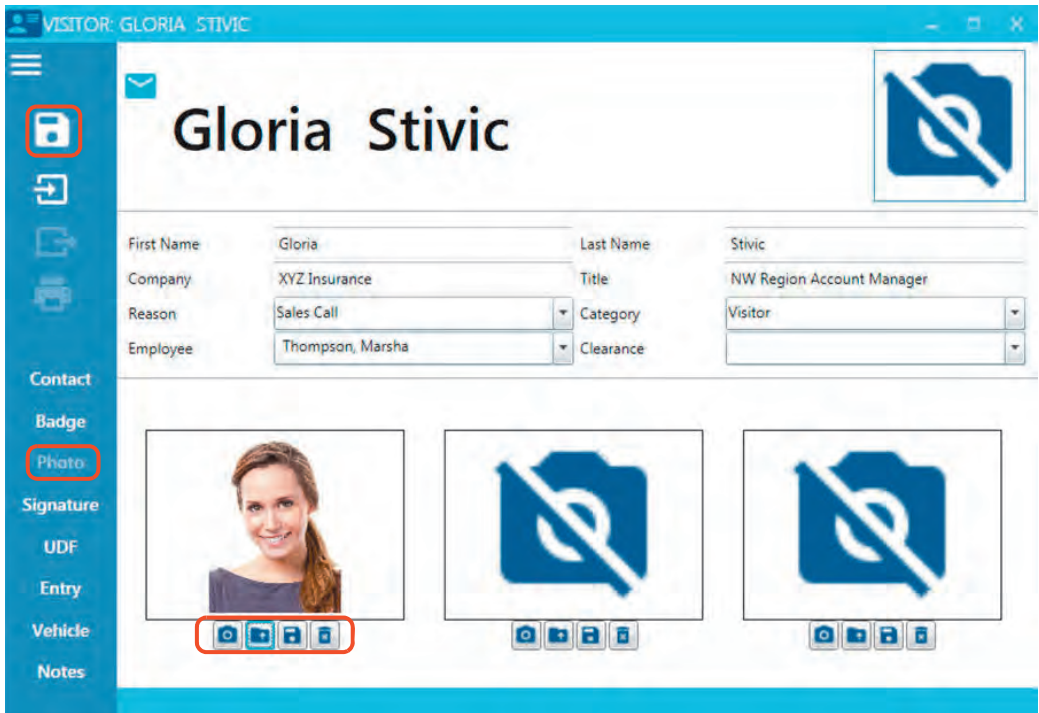
First Name	Gloria	Last Name	Stivic
Company	XYZ Insurance	Title	NW Region Account Manager
Reason	Sales Call	Category	Visitor
Employee	Thompson, Marsha	Clearance	

Badge

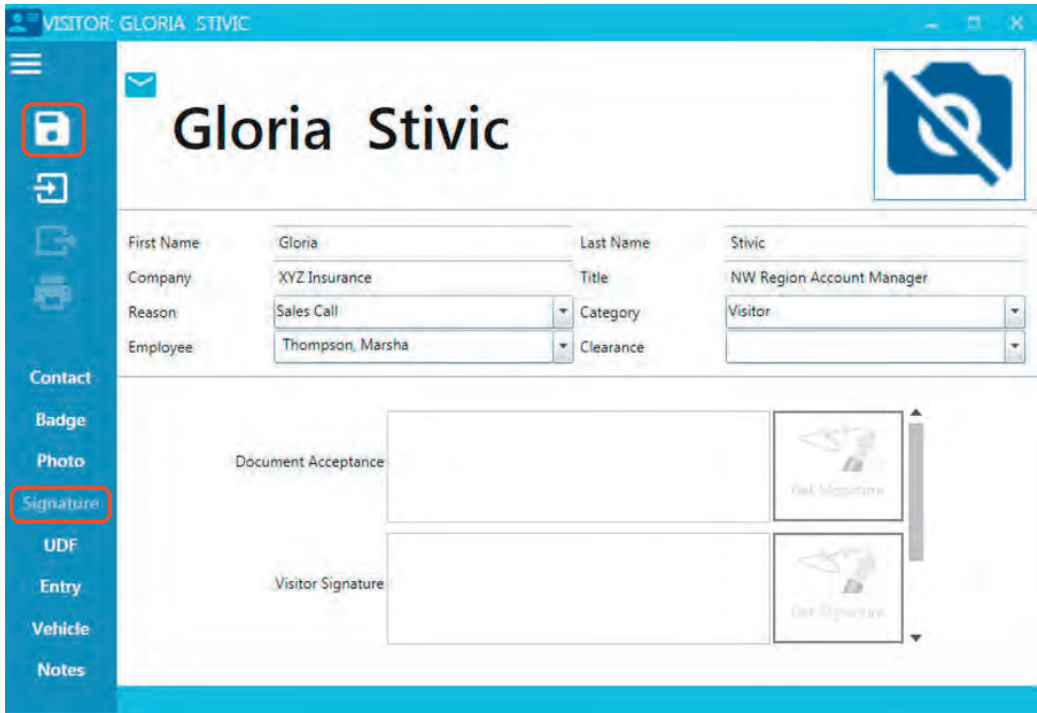
Valid From	10/18/2016 12:00 AM	Valid To	10/18/2016 11:59 PM
------------	---------------------	----------	---------------------

Custom Id		Prox Card	
Site Name	Eden Prairie	Check-In Operator	
Check-In Operator		Check-Out Operator	
Registered By	admin	Approved By	

- 4. Select the **Photo** tab. A user can take a photo or load a photo from a file.
Note: Clicking on the photo icon in the top right corner, opens the **Photo** tab.



- 5. Select the **Signature** tab. Obtain the visitor signature, if needed. Signature Types are set up by the administrator in Other Lists. See *Chapter 5: Visitor, Employee, and Other Lists*.





6. Select the **User Defined Fields (UDF)** tab. Enter the information as required by the site. These are additional fields that an administrator can create using the Program Options. See *Section 6.6: Customize Visitor Form Fields*.

VISITOR: GLORIA STIVIC

Gloria Stivic

First Name: Gloria

Company: XYZ Insurance

Reason: Sales Call

Employee: Thompson, Marsha

Last Name: Stivic

Title: NW Region Account Manager

Category: Visitor

Clearance:

Proper attire?

Company logo?

Favorite color? Reds

User Defined 4

User Defined 5

User Defined 6

User Defined 7

User Defined 8

User Defined 9

User Defined 10

User Defined 11

User Defined 12

7. Select the **Entry** tab. The Entry information is system-generated, historic information about a visitor. It is populated when a visitor is checked in and checked out of the site.

VISITOR: GLORIA STIVIC

Gloria Stivic

First Name: Gloria

Company: XYZ Insurance

Reason: Sales Call

Employee: Thompson, Marsha

Last Name: Stivic

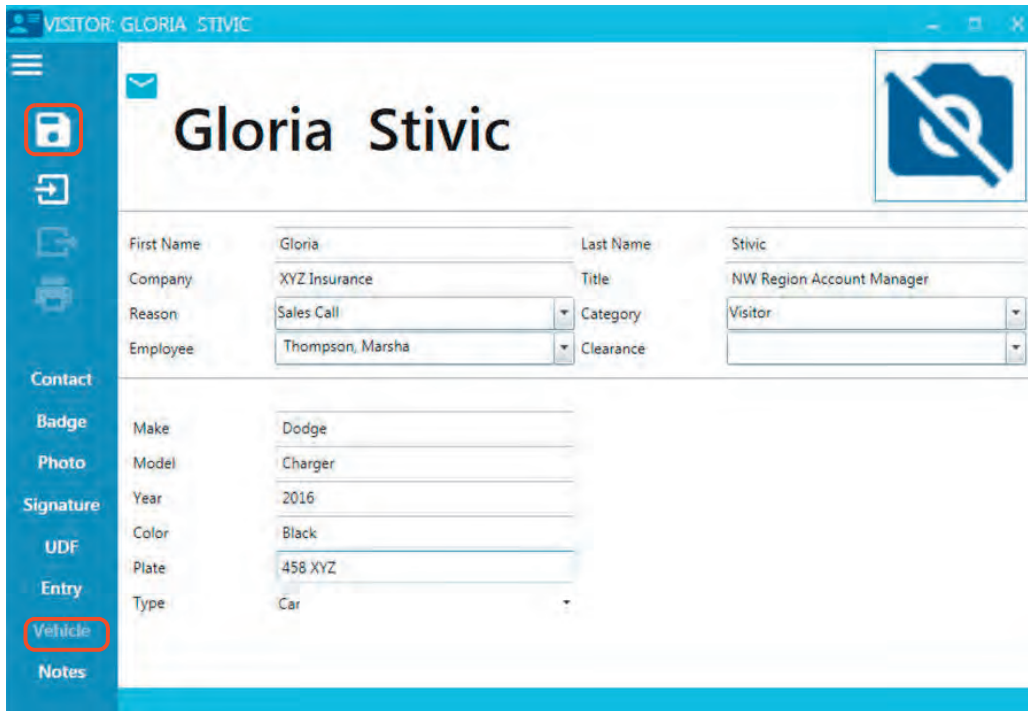
Title: NW Region Account Manager

Category: Visitor

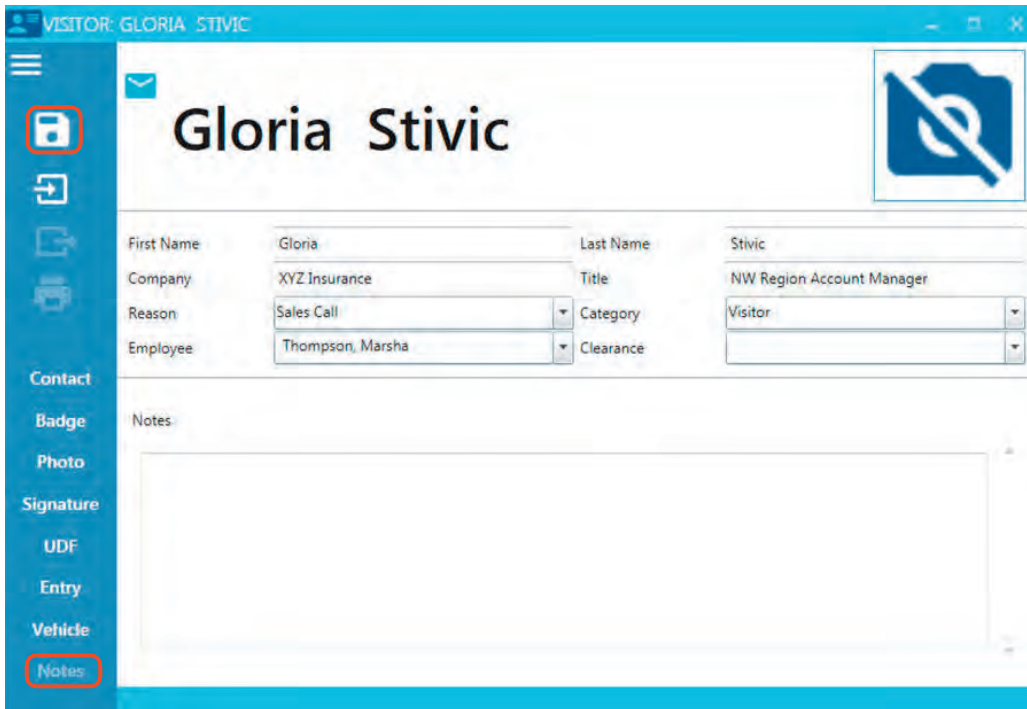
Clearance:

Type	Host	Time	Operator	Station
CheckIn	Marsha Thompson	10/18/2016 4:39:33 PM	admin	Lobby [001]

- 8. Select the **Vehicle** tab. Enter any information about the visitor's vehicle. Vehicle types are set by the administrator. See *Chapter 5: Visitor, Employee, and Other Lists*



- 9. Select the **Notes** tab. Enter any additional information about the visitor.
- 10. Click the **Save** icon.



3.3.2.3 Open a Form

Visitor and Employee records are created using forms. The forms contain all the information needed to use EasyLobby Solo. The information entered on the form is stored as a record in the database. The Visitor form is used to perform many tasks.

Visitor Form Initial Options

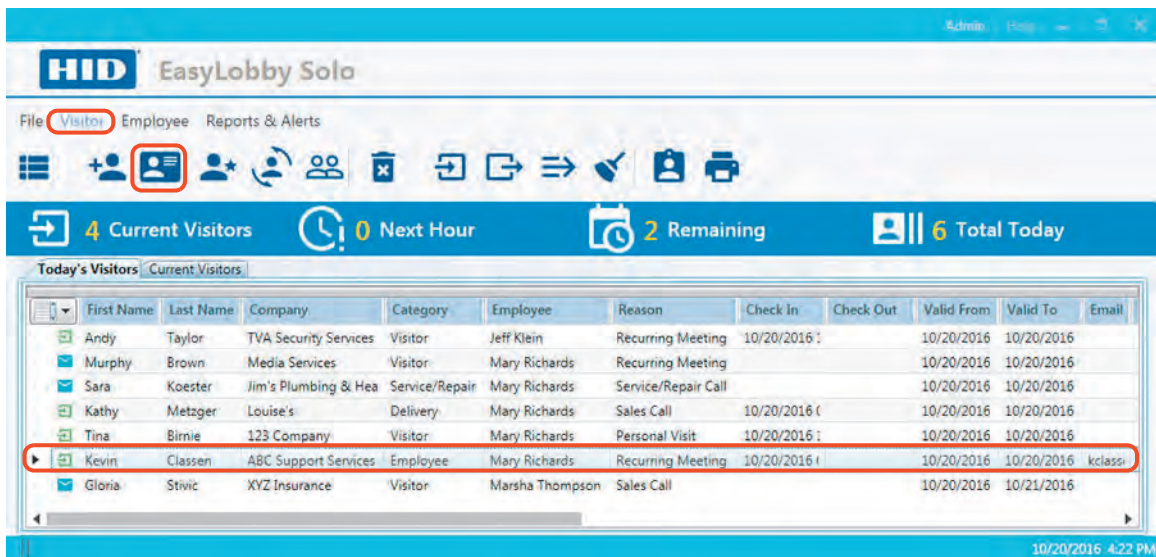
- Save changes
- Check a visitor in/out
- Print a badge

Additional Options with the Show More Icon

- Create a new visitor record
- Save changes
- Delete this visitor record
- Check a visitor in/out
- Check a visitor out by Custom ID
- Preregister a visitor
- Preview a badge
- Print a badge

1. Select a visitor name from the list.
2. Select the **Visitor > Open the Visitor Form for a Selected Visitor** icon.

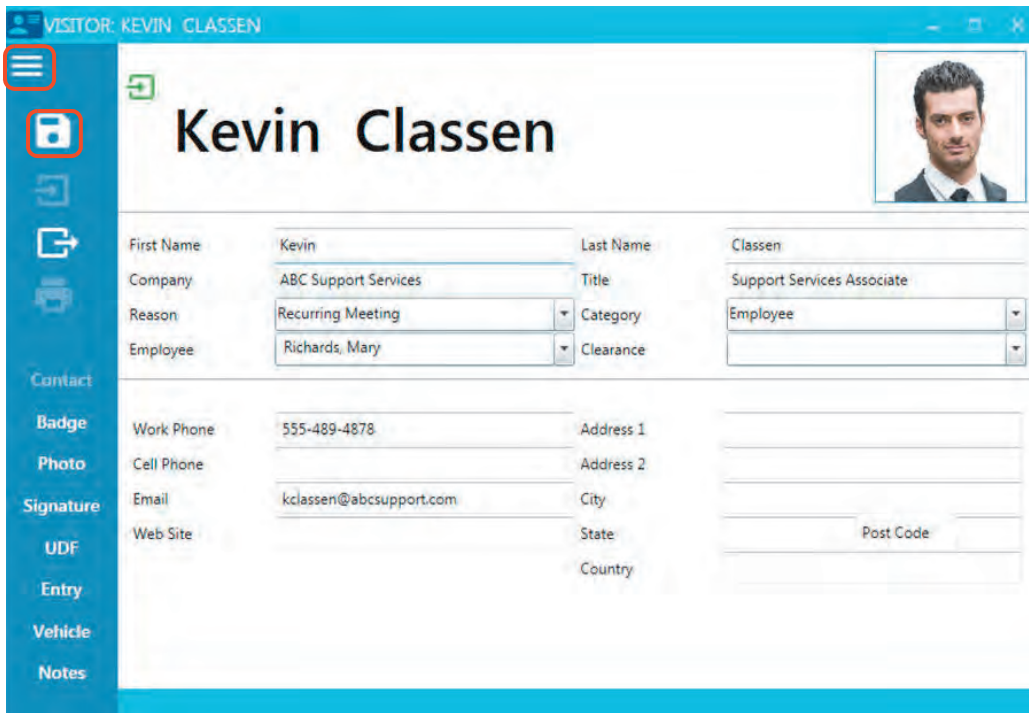
Note: This form can be opened by simply double-clicking the name in the visitor list.



The screenshot shows the HID EasyLobby Solo interface. At the top, there is a navigation bar with 'File', 'Visitor', 'Employee', and 'Reports & Alerts'. Below this is a toolbar with various icons, including a circled icon representing 'Open the Visitor Form for a Selected Visitor'. A status bar shows '4 Current Visitors', '0 Next Hour', '2 Remaining', and '6 Total Today'. Below the status bar is a table of 'Today's Visitors'.

	First Name	Last Name	Company	Category	Employee	Reason	Check In	Check Out	Valid From	Valid To	Email
	Andy	Taylor	TVA Security Services	Visitor	Jeff Klein	Recurring Meeting	10/20/2016		10/20/2016	10/20/2016	
	Murphy	Brown	Media Services	Visitor	Mary Richards	Recurring Meeting	10/20/2016		10/20/2016	10/20/2016	
	Sara	Koester	Jim's Plumbing & Hea	Service/Repair	Mary Richards	Service/Repair Call	10/20/2016		10/20/2016	10/20/2016	
	Kathy	Metzger	Louise's	Delivery	Mary Richards	Sales Call	10/20/2016		10/20/2016	10/20/2016	
	Tina	Birnie	123 Company	Visitor	Mary Richards	Personal Visit	10/20/2016		10/20/2016	10/20/2016	
	Kevin	Classen	ABC Support Services	Employee	Mary Richards	Recurring Meeting	10/20/2016		10/20/2016	10/20/2016	kclassen@abc.com
	Gloria	Stivic	XYZ Insurance	Visitor	Marsha Thompson	Sales Call	10/20/2016		10/20/2016	10/21/2016	

3. Edit the form and click the **Save** icon or select the **Show More** icon to display additional options.



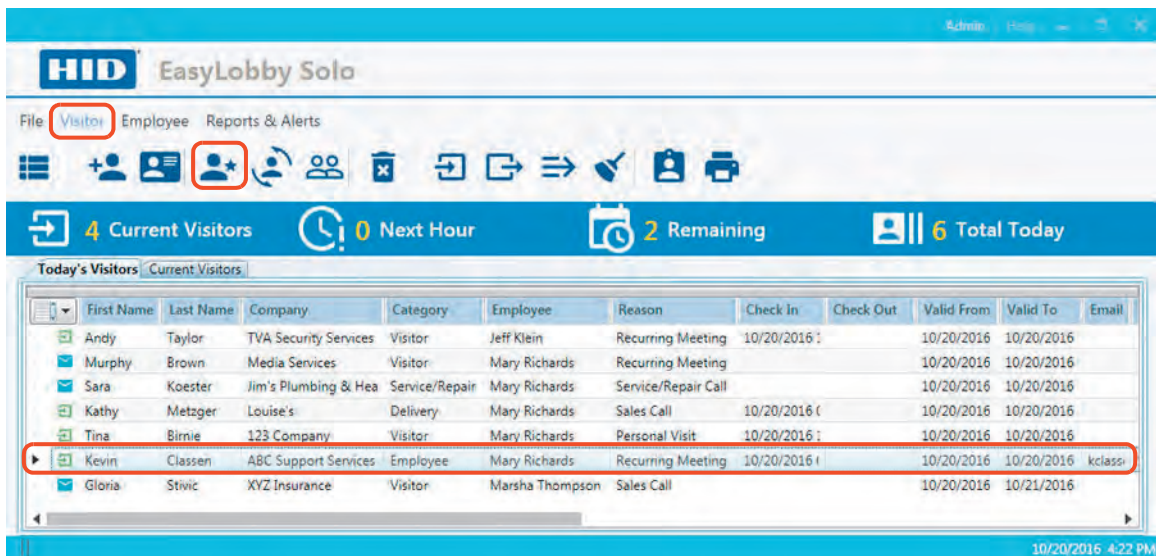
4. The user can select and implement any of the available options from this window.



3.3.2.4 Clone Current Selection

Cloning the current visitor creates a duplicate record of the selected visitor. This is useful when there are a number of visitors that have almost identical data. This allows the user to adjust only those fields they need to change such as the name and photo.

1. Select a visitor name to clone from the visitor list.
2. Select the **Visitor > Clone current selection** icon.



3. A new Visitor form is opened with the selected visitor's information. Modify as needed and click the **Save** icon. In this example, the contact information has been modified to Tom Jones and his photo has been removed. Once saved, the new form shows the new visitor.

Tom Jones

First Name	Tom	Last Name	Jones
Company	ABC Support Services	Title	Support Services Associate
Reason	Recurring Meeting	Category	Employee
Employee	Richards, Mary	Clearance	

Photo: [X]

Signature: [X]

UDF: [X]

Entry: [X]

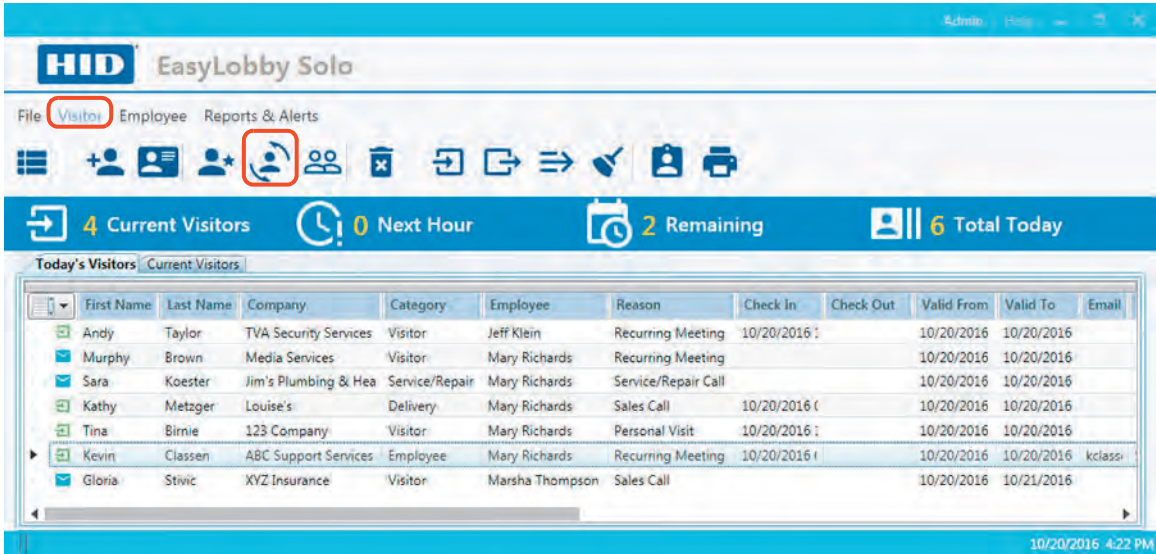
Vehicle: [X]

Notes: [X]

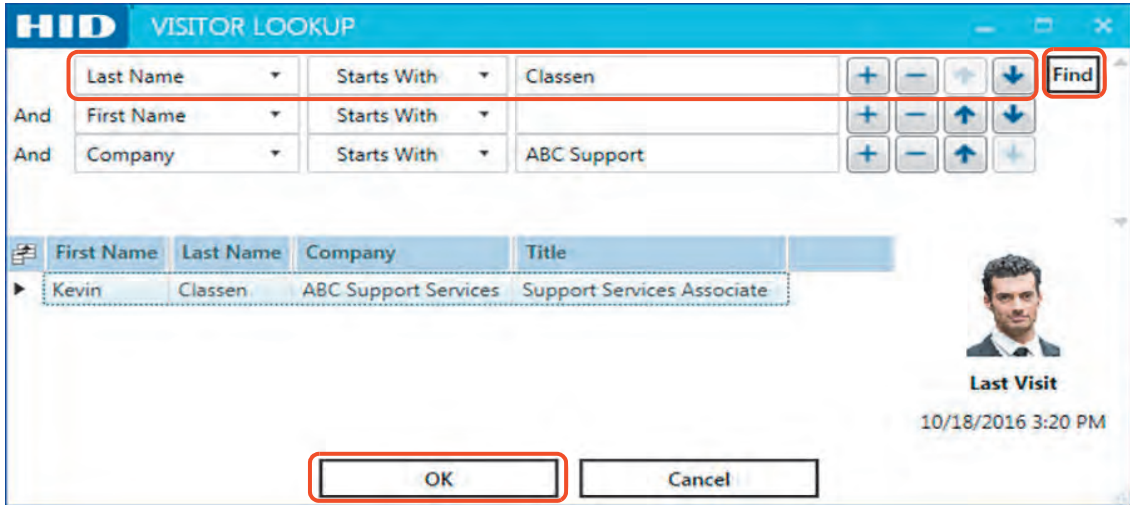
3.3.2.5 Returning Visitor

This option opens a visitor lookup window to locate possible matching visitors from the database. This can be used for frequent visitors to avoid having multiple visitor records. In addition, when a Visitor History Report is generated, a complete record of a visitor's activity is available.

- 1. Select the **Visitor > Returning Visitor** icon.



- 2. Use the drop-down lists to select a data field and a qualifier for your search. Then enter the text for your data field. To further define your search, select the controls to add or remove fields. Click **Find**.
- 3. The information found is listed on the lower section of the window. If there are multiple results, select one from the list and click **OK**.





- The Visitor form opens and all visitor information, such as Badge fields and Entry data, is included. The user should adjust the **Valid To** and **Valid From** data on the Badge tab and check in the visitor. New check in events appear on the Entry tab.

VISITOR: KEVIN CLASSEN

Kevin Classen



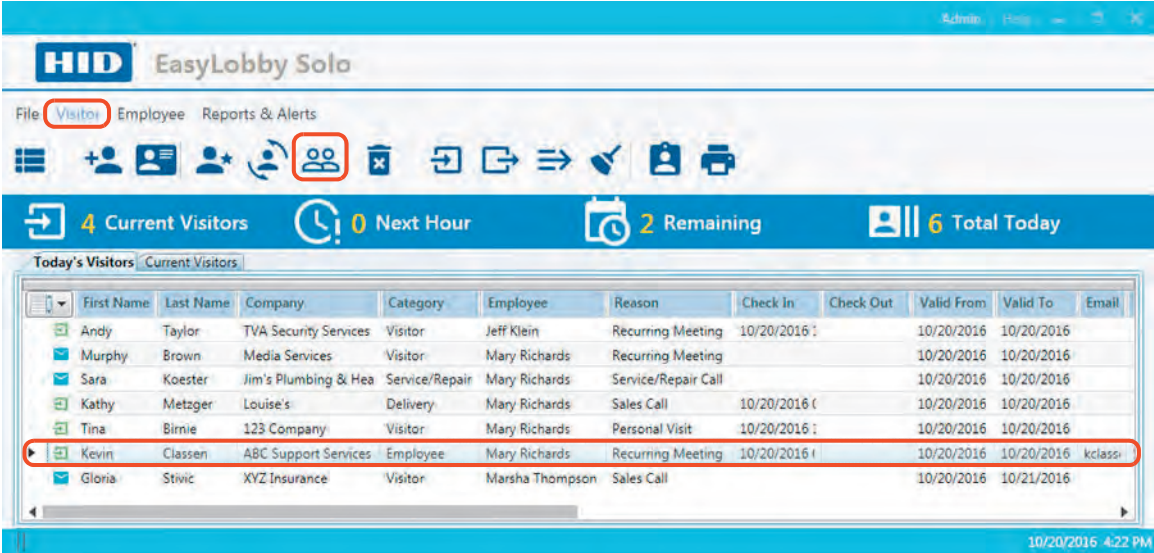
First Name	Kevin	Last Name	Classen
Company	ABC Support Services	Title	Support Services Associate
Reason	Recurring Meeting	Category	Employee
Employee	Richards, Mary	Clearance	

Work Phone	555-489-4878	Address 1	
Cell Phone		Address 2	
Email	kclassen@abcsupport.com	City	
Web Site		State	Post Code
		Country	

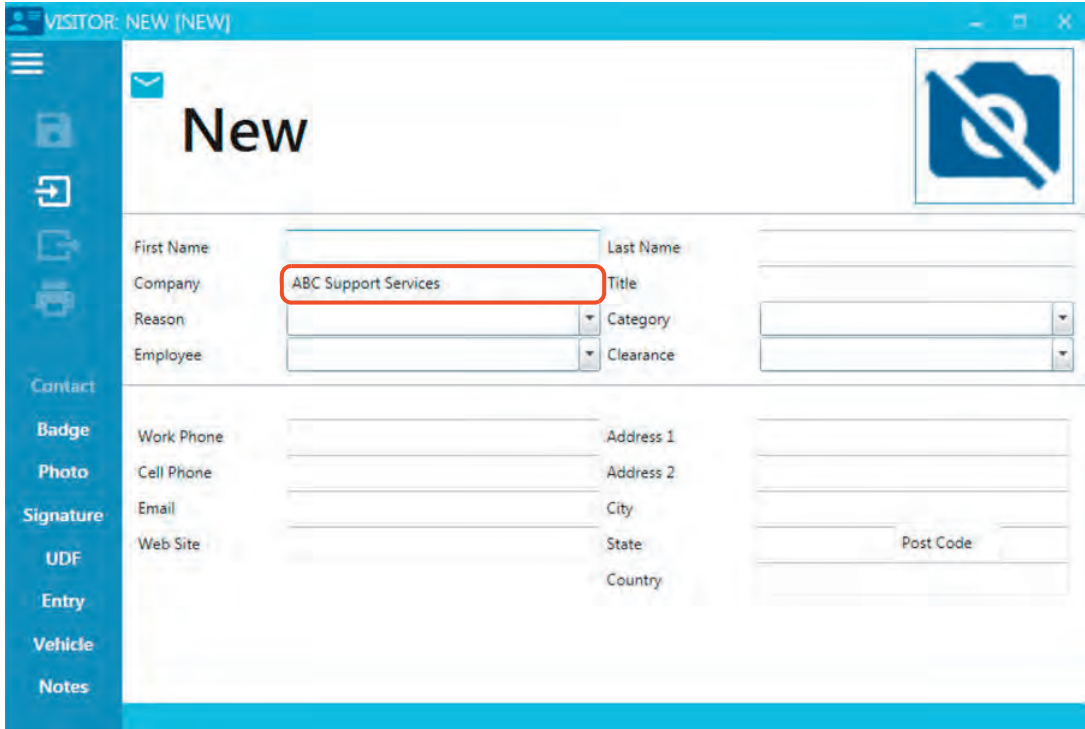
3.3.2.6 Visitor From Same Company

This option allows a user to open a new Visitor form with the same company name as the selected visitor. This simplifies the process of creating new records for groups of visitors.

- 1. Select a visitor name from the list to create a new Visitor form.
- 2. Select the **Visitor > Visitor from same Company** icon.



- 3. A new Visitor form opens with the company name populated. See *Section 3.3.2.2: Create a New Record* for details on completing this form.

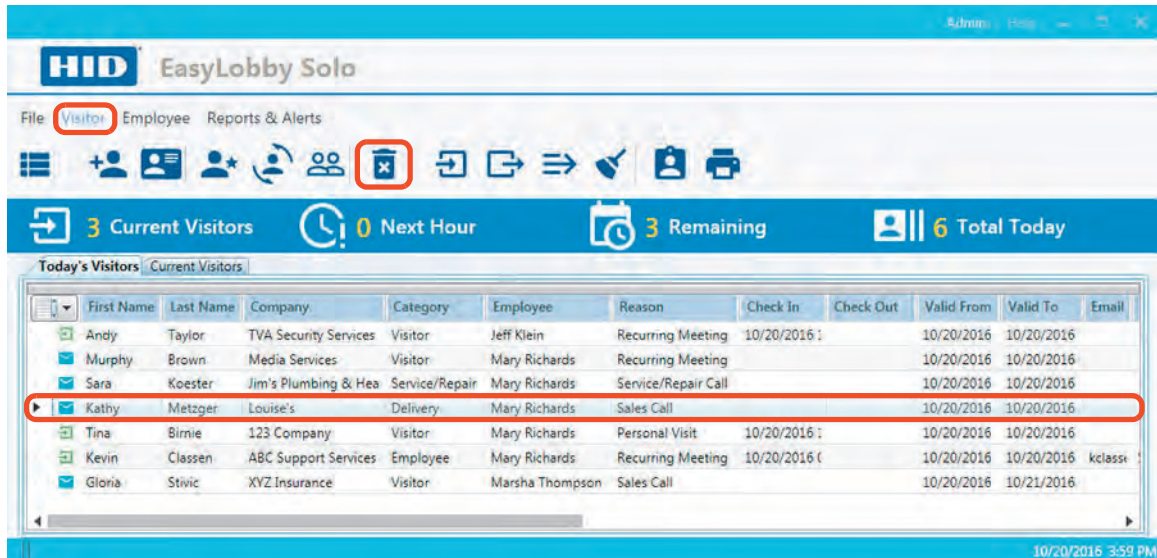


3.3.2.7 Delete the Current Record

Note: Only an administrator can delete Visitor and Employee records.

When deleting records, all details and visit information are also removed from the system. When an employee record is deleted, all information stored about that employee as a host (from the Entry tab) is lost. Another option for employees no longer at your company is to mark them as Inactive.

1. Select a visitor name to delete.
2. Select the **Visitor > Delete** icon.



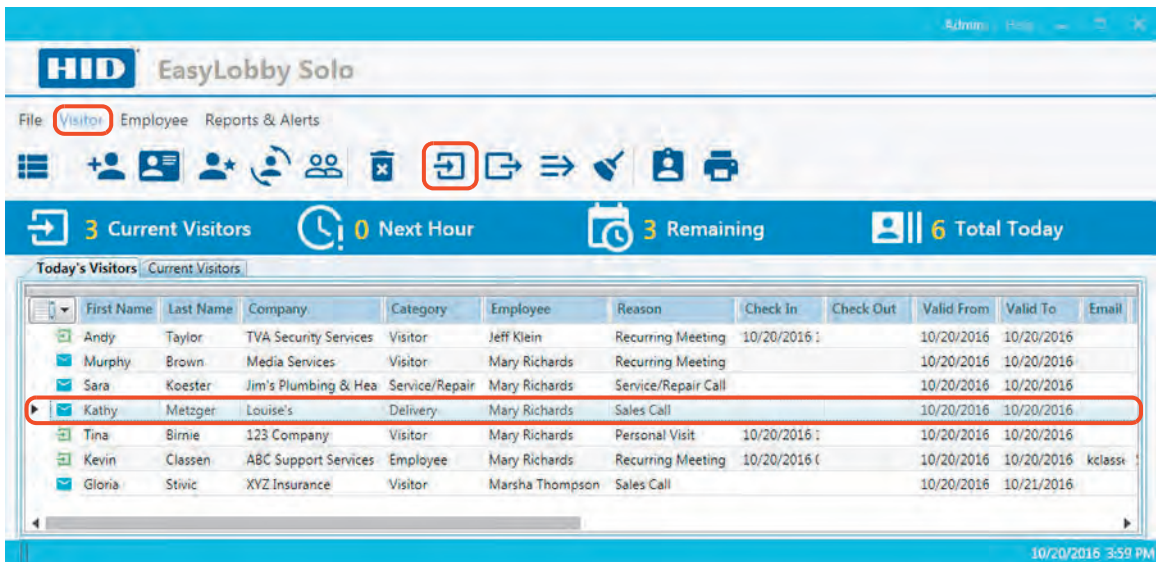
3. A delete confirmation message is displayed. Click **OK**.
4. A completed message is displayed. Click **OK**.
5. The visitor record is removed from the list.

3.3.2.8 Check In a Visitor

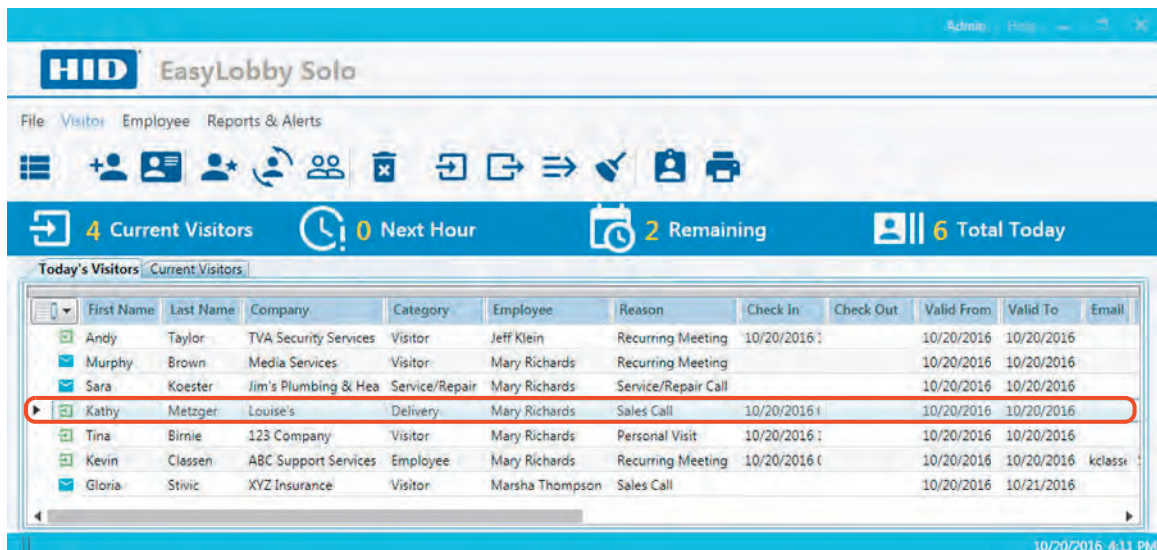
When a visitor is checked in, a visitor badge can be printed and an email can be sent to the employee host to indicate their visitor has arrived. See *Section 6.4: Update Email Settings* for more information.

1. Select a visitor name to check in from the visitor list.
2. Select the **Visitor > Check In** icon.

Note: A visitor can also be checked in from the Visitor form.



3. A confirmation message is displayed. Click **OK**.
4. The icon for the visitor changes to indicate they have checked in.



3.3.2.9 Check Out a Visitor

1. Select a visitor name to check out from the visitor list.
2. Select the **Visitor** > **Check Out** icon.

Note: A visitor can also be checked out from the Visitor form.

The screenshot shows the HID EasyLobby Solo interface. At the top, there are navigation tabs for 'Visitor', 'Employee', and 'Reports & Alerts'. Below the navigation is a toolbar with various icons, including a 'Check Out' icon (a person with a checkmark) which is highlighted with a red box. Below the toolbar, there are statistics: '4 Current Visitors', '0 Next Hour', '2 Remaining', and '6 Total Today'. The main area displays a table of 'Today's Visitors' with columns for First Name, Last Name, Company, Category, Employee, Reason, Check In, Check Out, Valid From, Valid To, and Email. The row for 'Kevin Classen' is highlighted with a red box.

First Name	Last Name	Company	Category	Employee	Reason	Check In	Check Out	Valid From	Valid To	Email
Andy	Taylor	TVA Security Services	Visitor	Jeff Klein	Recurring Meeting	10/20/2016		10/20/2016	10/20/2016	
Murphy	Brown	Media Services	Visitor	Mary Richards	Recurring Meeting			10/20/2016	10/20/2016	
Sara	Koester	Jim's Plumbing & Hea	Service/Repair	Mary Richards	Service/Repair Call			10/20/2016	10/20/2016	
Kathy	Metzger	Louise's	Delivery	Mary Richards	Sales Call	10/20/2016		10/20/2016	10/20/2016	
Tina	Birmie	123 Company	Visitor	Mary Richards	Personal Visit	10/20/2016		10/20/2016	10/20/2016	
Kevin	Classen	ABC Support Services	Employee	Mary Richards	Recurring Meeting	10/20/2016		10/20/2016	10/20/2016	kclassi
Gloria	Stvic	XYZ Insurance	Visitor	Marsha Thompson	Sales Call			10/20/2016	10/21/2016	

3. A confirmation message is displayed. Click **OK**.
4. The icon for the visitor changes to indicate they have Checked Out.

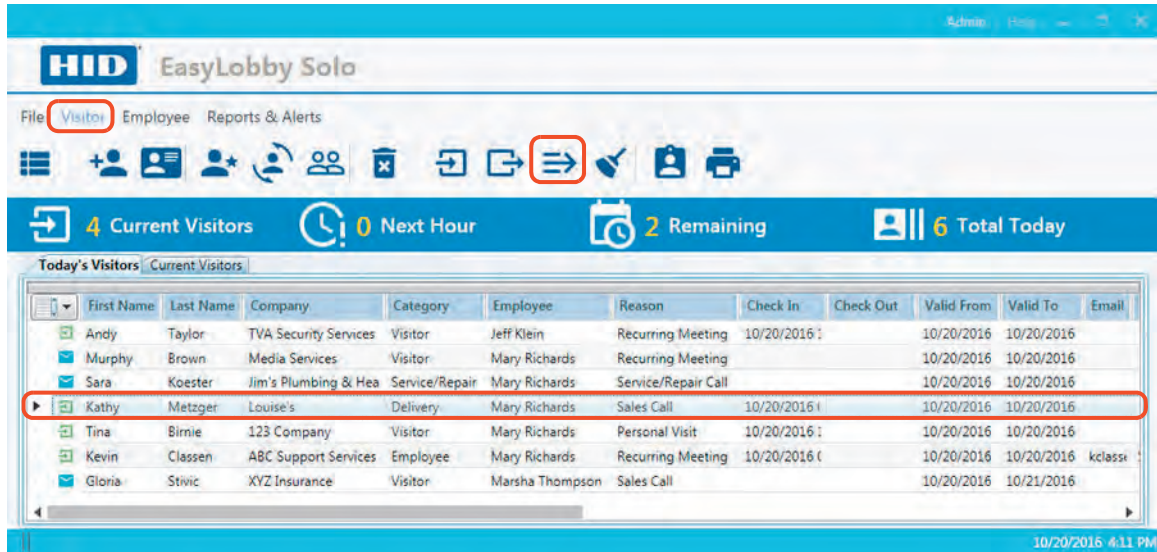
The screenshot shows the HID EasyLobby Solo interface after the check-out action. The 'Check Out' icon in the toolbar is now a person with a checkmark. The statistics at the top show '3 Current Visitors', '0 Next Hour', '2 Remaining', and '5 Total Today'. The table of 'Today's Visitors' is the same as in the previous screenshot, but the 'Check Out' column for 'Kevin Classen' now contains a checkmark, and the icon next to his name has changed to a person with a checkmark.

First Name	Last Name	Company	Category	Employee	Reason	Check In	Check Out	Valid From	Valid To	Email
Andy	Taylor	TVA Security Services	Visitor	Jeff Klein	Recurring Meeting	10/20/2016		10/20/2016	10/20/2016	
Murphy	Brown	Media Services	Visitor	Mary Richards	Recurring Meeting			10/20/2016	10/20/2016	
Sara	Koester	Jim's Plumbing & Hea	Service/Repair	Mary Richards	Service/Repair Call			10/20/2016	10/20/2016	
Kathy	Metzger	Louise's	Delivery	Mary Richards	Sales Call	10/20/2016		10/20/2016	10/20/2016	
Tina	Birmie	123 Company	Visitor	Mary Richards	Personal Visit	10/20/2016		10/20/2016	10/20/2016	
Kevin	Classen	ABC Support Services	Employee	Mary Richards	Recurring Meeting	10/20/2016	10/20/2016	10/20/2016	10/20/2016	kclassi
Gloria	Stvic	XYZ Insurance	Visitor	Marsha Thompson	Sales Call			10/20/2016	10/21/2016	

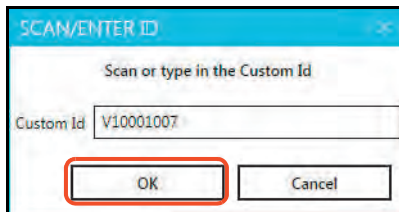
3.3.2.10 Check Out a Visitor By Custom ID

Custom IDs are set up by an administrator through the Program Options and can be used for frequent or regular visitors. A Custom ID can contain a specific designation before the ID number such as V or Visitor. This number can be used to check out a visitor. See *Section 6.3: Update General Defaults* for more information.

1. Select a visitor name from the visitor list.
2. Select the **Visitor > Check out visitor by Custom Id** icon.



3. Scan the barcode or enter the **Custom Id** located on the badge and click **OK**.



4. A confirmation message is displayed. Click **OK**.



5. The icon for the visitor changes to indicate they have checked out.

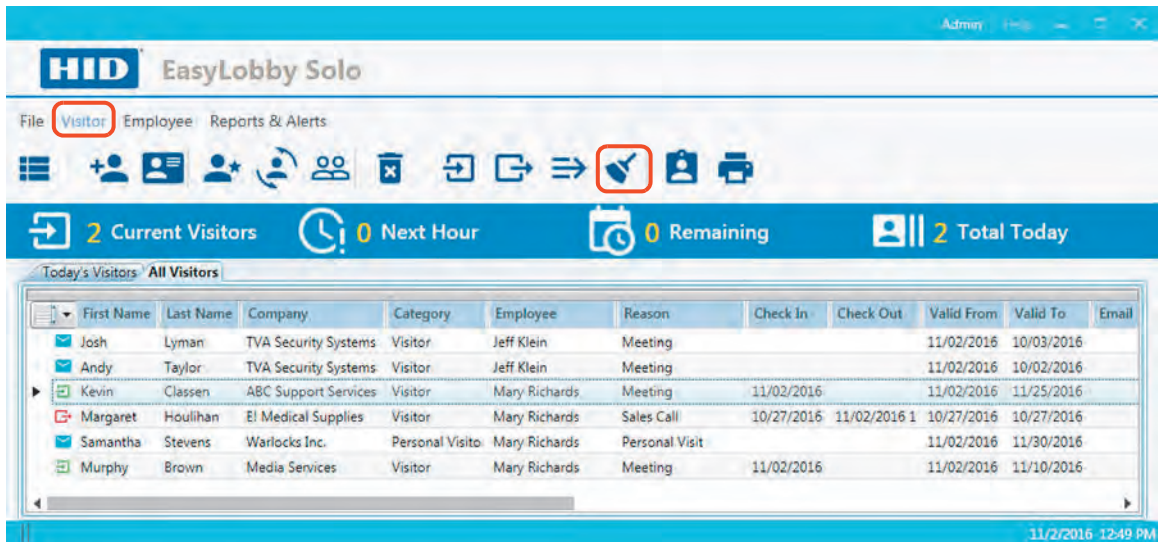
The screenshot shows the HID EasyLobby Solo interface. At the top, there are statistics: 2 Current Visitors, 0 Next Hour, 2 Remaining, and 4 Total Today. Below this is a table of 'Today's Visitors' with columns for First Name, Last Name, Company, Category, Employee, Reason, Check In, Check Out, Valid From, Valid To, and Email. The row for Kathy Metzger is highlighted with a red box. Her icon is a red square with a white 'X', indicating she has checked out. Other visitors listed include Andy Taylor, Sara Koester, Tina Birnie, Kevin Classen, and Gloria Stivic.

First Name	Last Name	Company	Category	Employee	Reason	Check In	Check Out	Valid From	Valid To	Email
Andy	Taylor	TVA Security Services	Visitor	Jeff Klein	Recurring Meeting	10/20/2016		10/20/2016	10/20/2016	
Murphy	Brown	Media Services	Visitor	Mary Richards	Recurring Meeting	10/20/2016		10/20/2016	10/20/2016	
Sara	Koester	Jim's Plumbing & Hea	Service/Repair	Mary Richards	Service/Repair Call	10/20/2016		10/20/2016	10/20/2016	
Kathy	Metzger	Louise's	Delivery	Mary Richards	Sales Call	10/20/2016	10/20/2016	10/20/2016	10/20/2016	
Tina	Birnie	123 Company	Visitor	Mary Richards	Personal Visit	10/20/2016		10/20/2016	10/20/2016	
Kevin	Classen	ABC Support Services	Employee	Mary Richards	Recurring Meeting	10/20/2016	10/20/2016	10/20/2016	10/20/2016	kclassi
Gloria	Stivic	XYZ Insurance	Visitor	Marsha Thompson	Sales Call	10/20/2016		10/20/2016	10/21/2016	

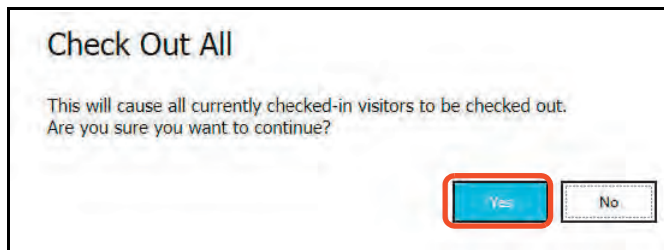
3.3.2.11 Check Out All Visitors

At the end of a day, any visitors that have left and have not been checked out, can all be checked out at one time.

1. Select the **Visitor > Check Out All** icon.



2. Click **Yes**.

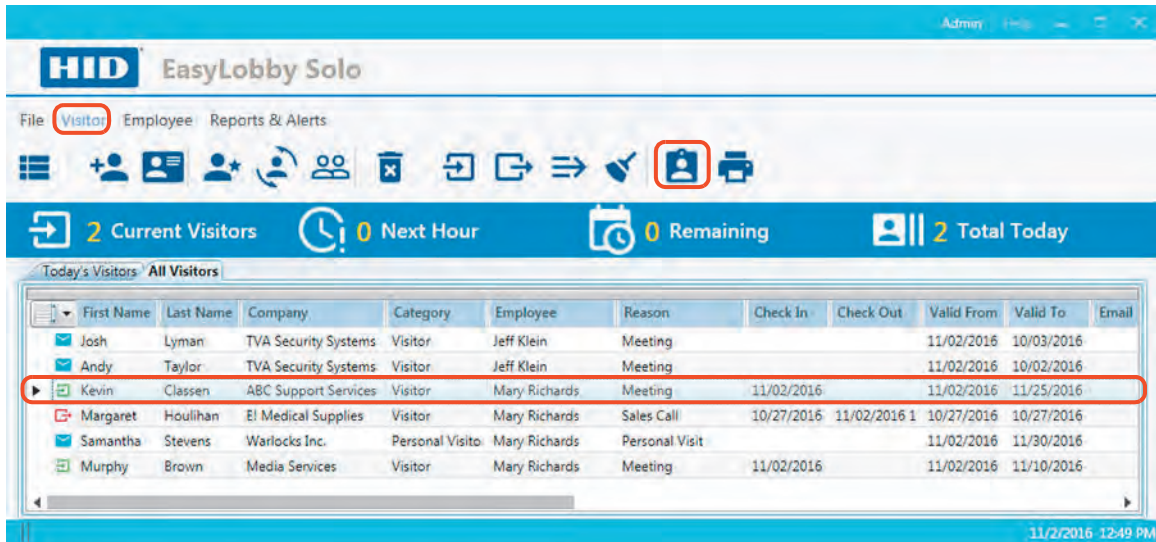


3. A message that *All have been checked out* or *There were no Visitors to check out* appears. Click **OK**.

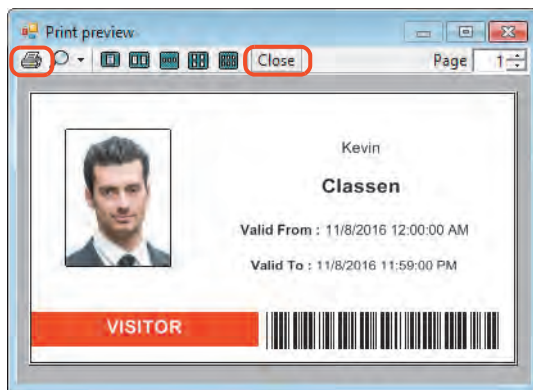
3.3.2.12 Preview a Badge

When the visitor information is completed, the user can preview the badge to verify that all the information is correct.

1. Select a visitor name from the visitor list to preview the badge.
2. Select the **Visitor** > **Preview Badge** icon.

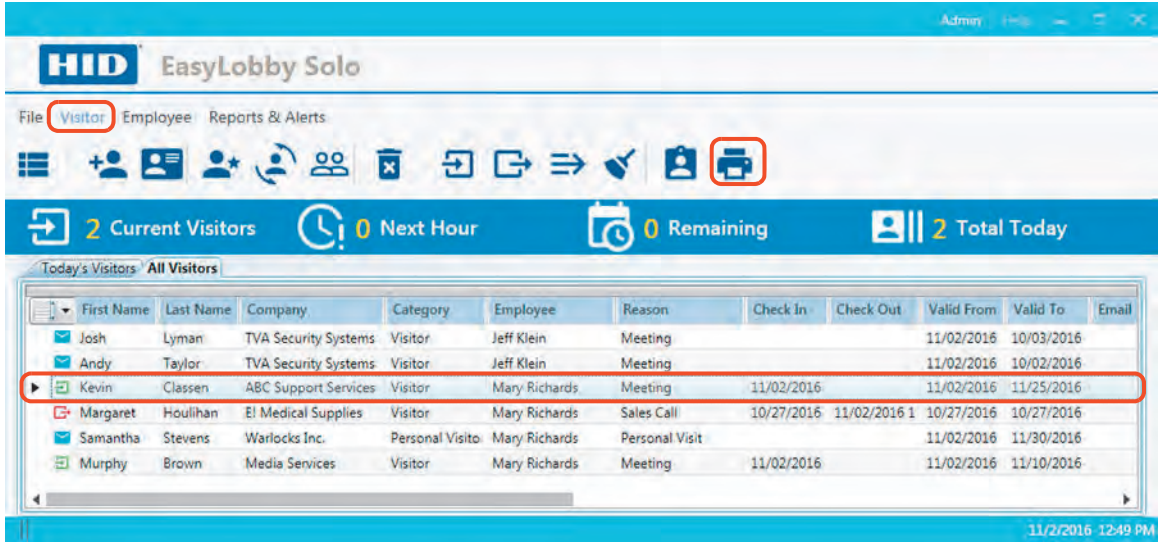


3. The badge preview is displayed. Click the **Printer** icon to print the badge. Click **Close** to close the preview window.



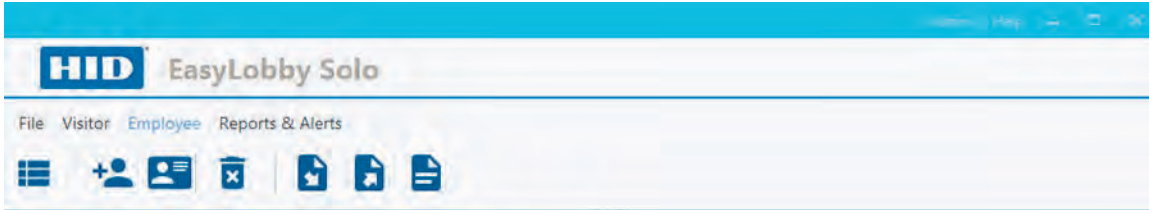
3.3.2.13 Print a Badge








1. Select a visitor name from the visitor list to print the badge.
2. Select the **Visitor** > **Print Badge** icon.



3.3.3 Employee Menu

The Employee menu manages the employee functions such as create, delete, view profile, import, and export employee records.

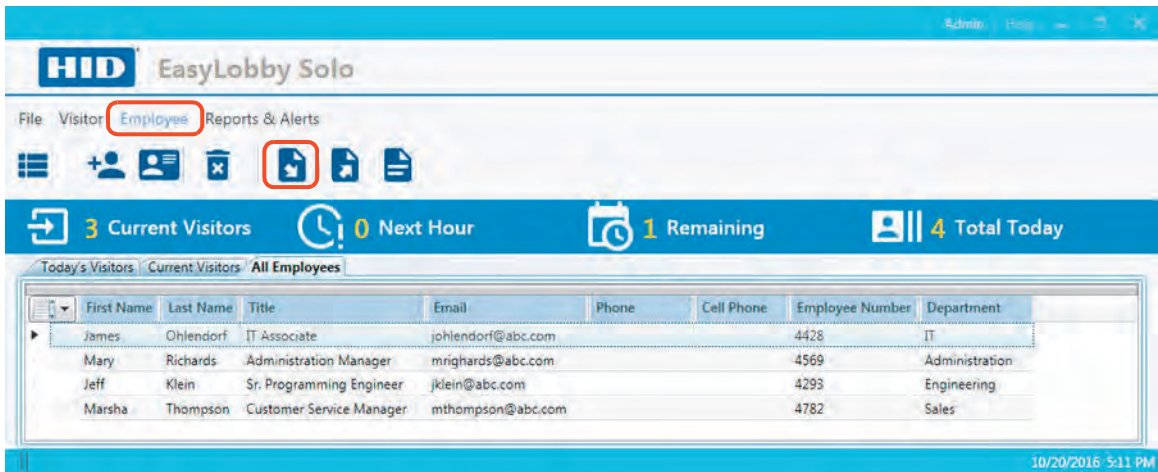


Icon	Operator	Administrator	Function
	✓	✓	Add an Employee tab to the grid view. This allows the user to customize the lists shown below the status bar. See <i>Section 3.3.2.1: Add a Grid View</i> .
		✓	Create a new employee record. See <i>Section 3.3.2.2: Create a New Record</i> .
	✓	✓	Open the Employee Form for the selected employee. See <i>Section 3.3.2.3: Open a Form</i> .
		✓	Delete the current employee record. This option removes the employee record from the database. See <i>Section 3.3.2.7: Delete the Current Record</i> .
		✓	Import employee data from a comma-separated value (.csv) formatted file.
		✓	Export employee data to a .csv file. See <i>Section 3.3.3.2: Export Employee Data</i> .
		✓	Open Import file template. This option opens a .csv file template to enter employee information.

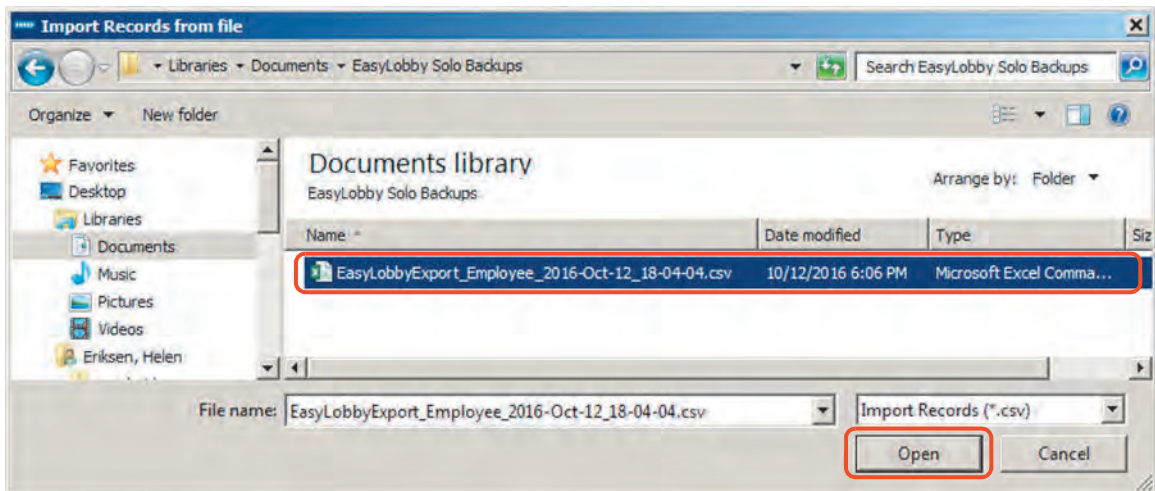
3.3.3.1 Import Employee Data from File

To import employee data into EasyLobby Solo an import file must be created. See *Section 3.3.3.3: Create an Import File* for instructions on creating this file.

1. Select the **Employee > Import Employee data from file** icon.



2. Navigate to the location of the import file and click **Open**.

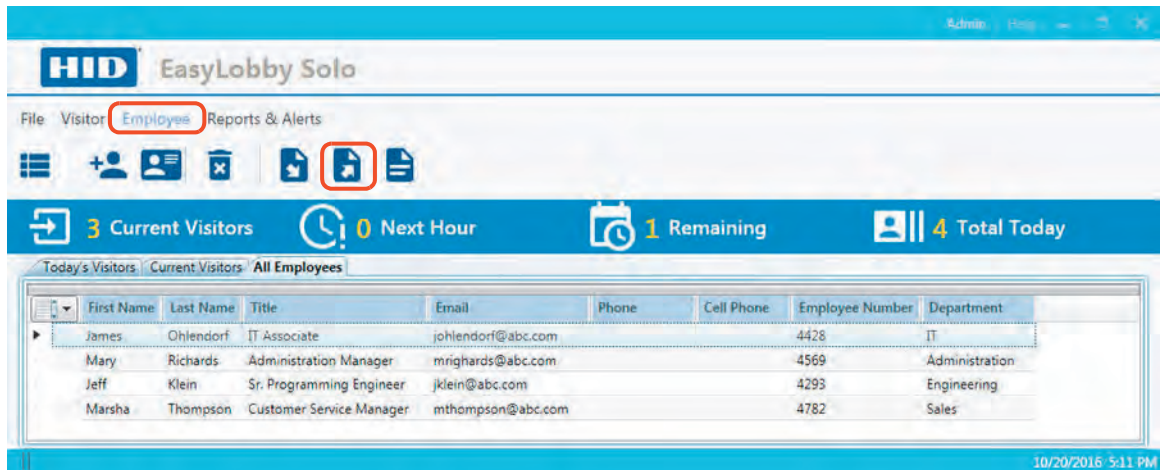


3. Click **OK**.

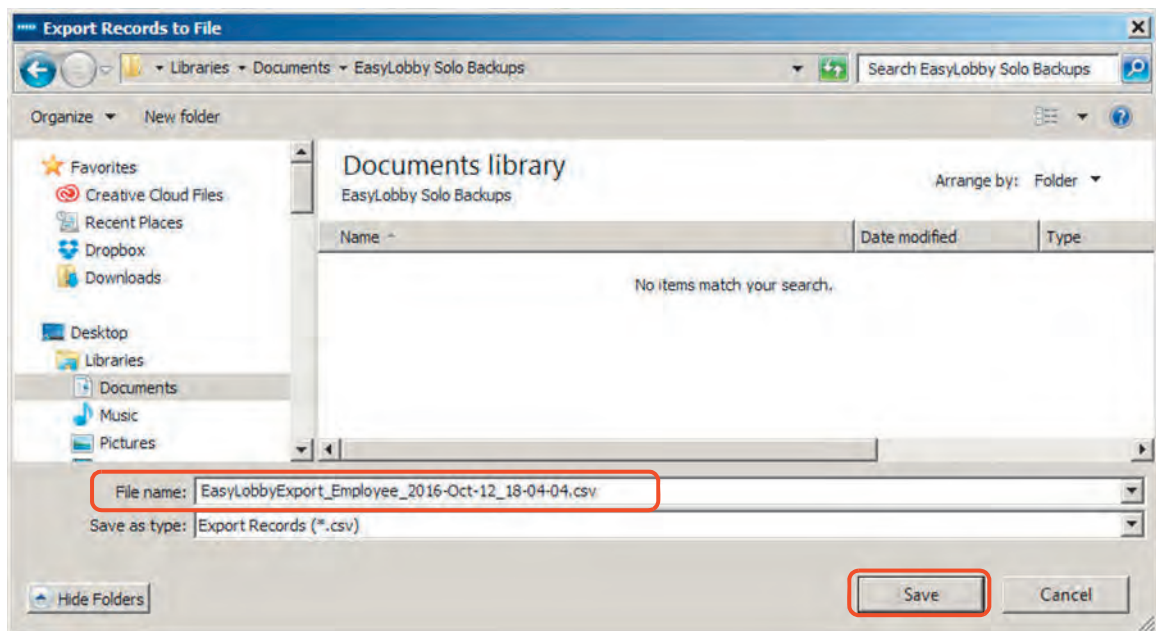
3.3.3.2 Export Employee Data

All active employee information stored within EasyLobby Solo can be exported to a **.csv** file. This task is useful when a user needs to edit a number of employees at one time.

1. Select the **Employee > Export Employee data to file** icon.



2. Navigate to the location to store the file. Enter a file name and click **Save**.

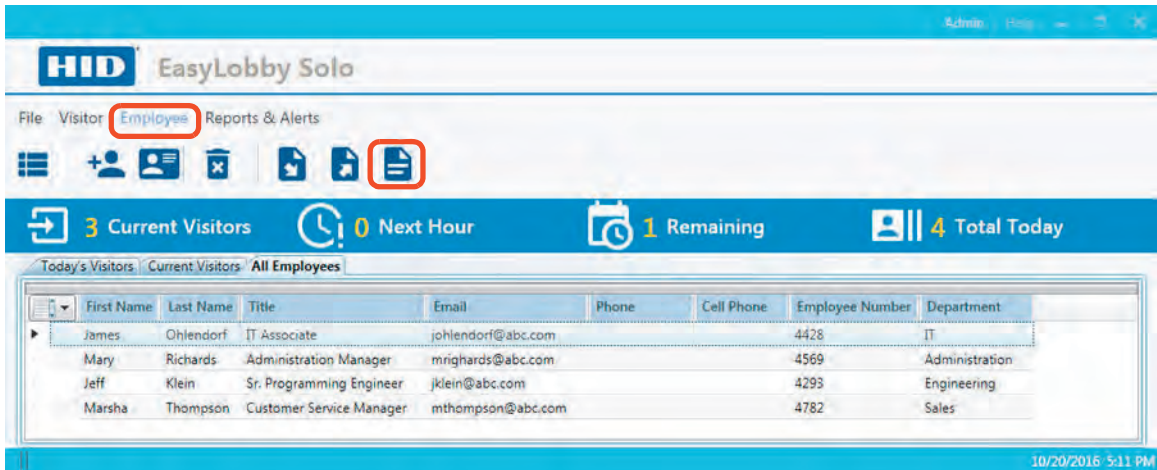


3. Click **OK**.

3.3.3.3 Create an Import File

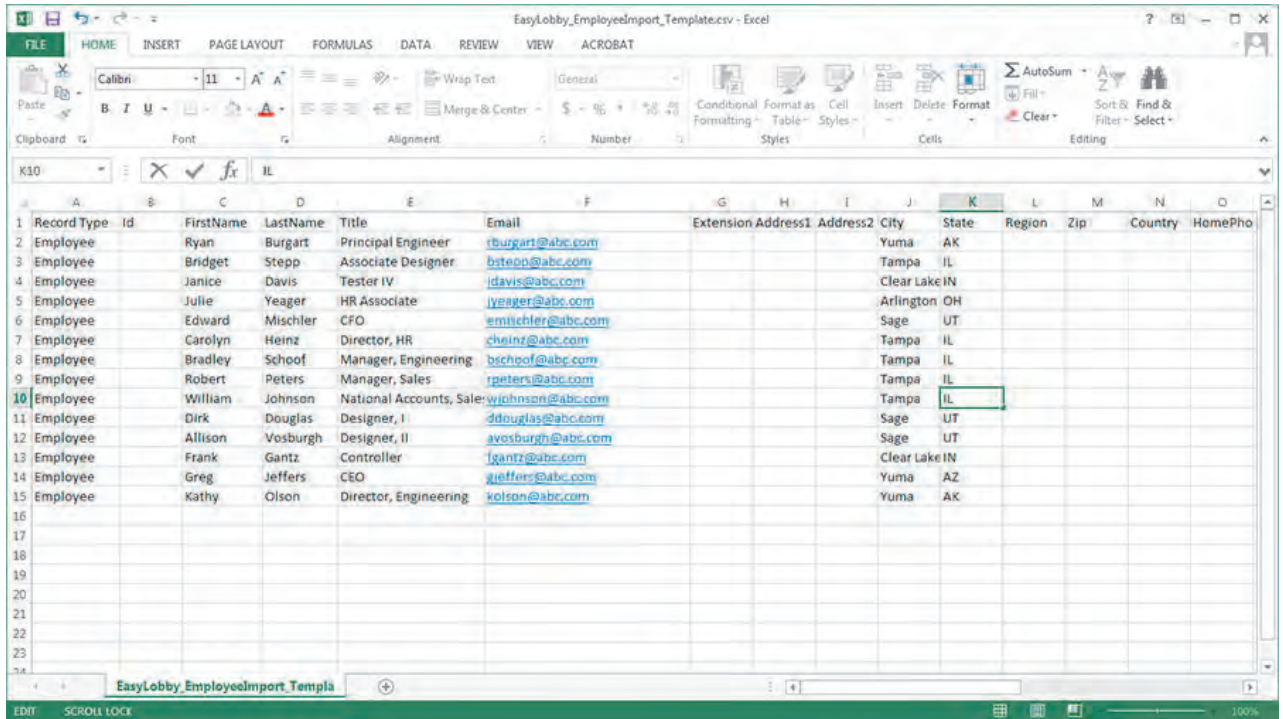
An employee file can be created to add new employees to the database as well as update current employee information. You can mix new and existing employee records in a single **.csv** file or use separate **.csv** files for each function. An import file template is provided to simplify the process.

1. Select the **Employee > Open import file template** icon.



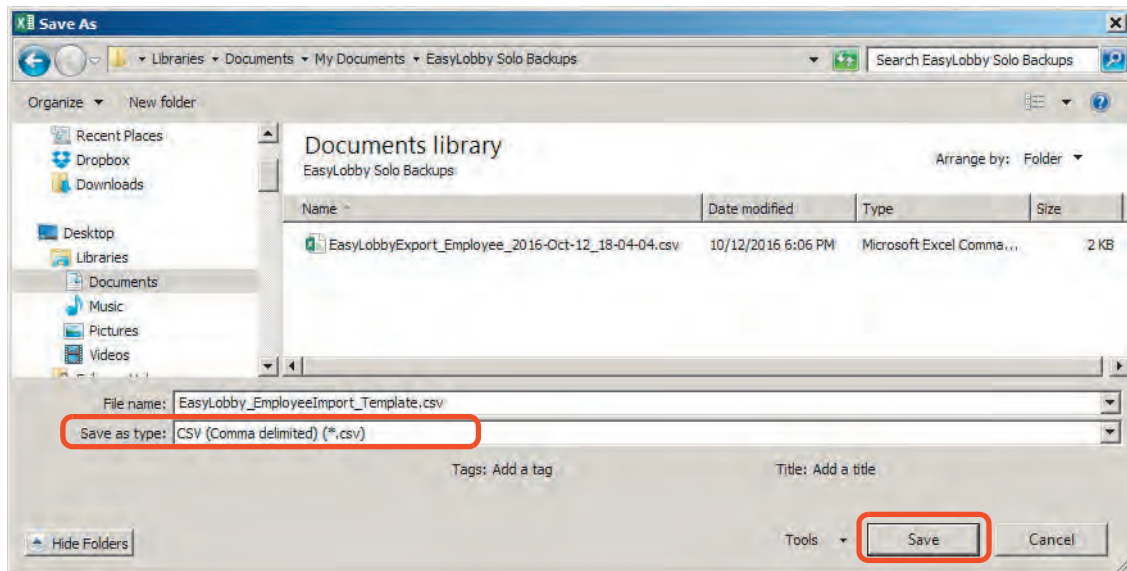
2. The template opens as a spreadsheet using the default application for **.csv** files on your workstation. Enter the employee information according to the following requirements:
 - Each employee record must include a **First Name** and a **Last Name**.
 - Do not change or remove the information in Row 1.
 - Add your employee names starting in Row 2 (overwriting the sample entries).
 - For each employee name entered, the **Record Type** must be *Employee*.
 - The **ID** column can be left blank, but it cannot be deleted. If this column is blank, the system creates a new employee from this record.
 - Columns can be re-ordered if the heading remains intact.
 - Columns can be deleted (except **First Name**, **Last Name**, **ID**, and **Record Type**).

The following is an example of an import file.



Record Type	Id	FirstName	LastName	Title	Email	Extension	Address1	Address2	City	State	Region	Zip	Country	HomePhone
Employee		Ryan	Burgart	Principal Engineer	rburgart@abc.com				Yuma	AK				
Employee		Bridget	Stapp	Associate Designer	bstapp@abc.com				Tampa	IL				
Employee		Janice	Davis	Tester IV	jdavis@abc.com				Clear Lake	IN				
Employee		Julie	Yeager	HR Associate	jyeager@abc.com				Arlington	OH				
Employee		Edward	Mischler	CFO	emischler@abc.com				Sage	UT				
Employee		Carolyn	Heinz	Director, HR	cheinz@abc.com				Tampa	IL				
Employee		Bradley	Schoof	Manager, Engineering	bschoof@abc.com				Tampa	IL				
Employee		Robert	Peters	Manager, Sales	rpeters@abc.com				Tampa	IL				
Employee		William	Johnson	National Accounts, Sale	wjohnson@abc.com				Tampa	IL				
Employee		Dirk	Douglas	Designer, I	ddouglas@abc.com				Sage	UT				
Employee		Allison	Vosburgh	Designer, II	avosburgh@abc.com				Sage	UT				
Employee		Frank	Gantz	Controller	fgantz@abc.com				Clear Lake	IN				
Employee		Greg	Jeffers	CEO	gjeffers@abc.com				Yuma	AZ				
Employee		Kathy	Oison	Director, Engineering	koison@abc.com				Yuma	AK				

3. When the spreadsheet is completed, select **File > Save As** and save the file in **.csv** format.



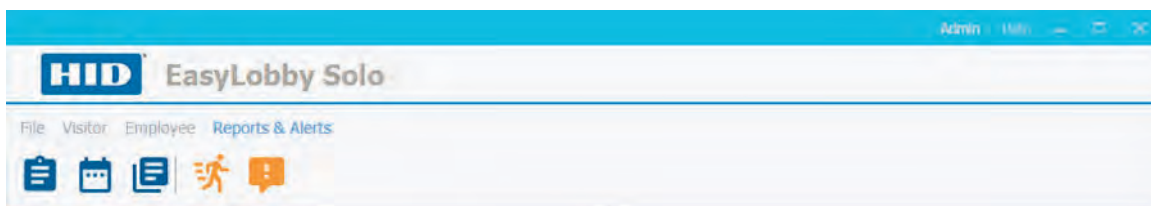
4. To import the file into EasyLobby Solo see *Section 3.3.3.1: Import Employee Data from File*.






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Chapter 4

Reports & Alerts

The Reports & Alerts option allows the user to run visitor reports and send an alert to evacuate the site, if necessary.



Icon	Operator	Administrator	Function
		✓	Run Current Visitor Report. Lists all the visitors that are checked in but not checked out.
		✓	Run Visit History Report. Lists the history of the visits of a selected visitor.
		✓	Launch Report Viewer. Opens a window that allows access to all the reports available with EasyLobby Solo. Report categories available are: Employee, Visitor, and Watch List. Employee report categories can be further defined as: Active Employee, All Employee, and Inactive Employee.
	✓	✓	Evacuation Report. Displays all currently checked in visitors and includes their photo (if captured), name, company, and contact information as well as contact information for the employee they are visiting. This report is intended to be used in the event of an emergency evacuation or a planned drill to identify and account for all visitor occupants of the site.
	✓	✓	Alert Message. Sends an immediate alert to the email address provided during installation. Additional email addresses can be specified in <i>Section 6.4: Update Email Settings</i> .

4.1 Reports

EasyLobby has the following basic reports that can be run at any time. They can also be printed or exported to a file. **Note:** For large reports, the contents can be scrolled and searched.

The following reports are available:

- Employee List Report (*Section 4.1.3: Employee List Report*)
- Visitor: Current Visitor Report (*Section 4.1.1: Current Visitor Report*)
- Visitor: Evacuation Report (*Section 4.1.6: Evacuation Report*)
- Visitor: Visitor By Date Report (*Section 4.1.4: Visitor By Date Report*)
- Visitor: Visitor History Report (*Section 4.1.2: Visit History Report*)
- Watch List Report (*Section 4.1.5: Watch List Report*)

EasyLobby Solo reports can be exported to the following file types:

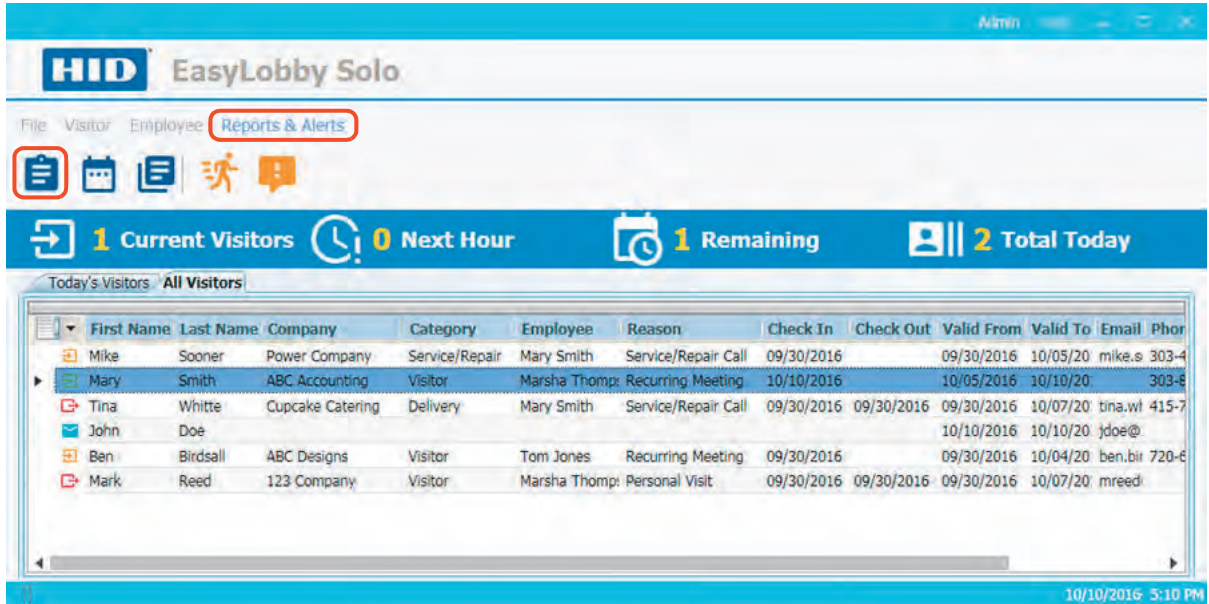
- Comma-separated values (.csv)
- Crystal Reports (.rpt)
- Extensible Markup Language (.xml)
- Microsoft Excel (.xls, .xlsx)
- Microsoft Word (.doc, .rtf)
- Portable document format (.pdf)
- Rich Text Format (.rtf)



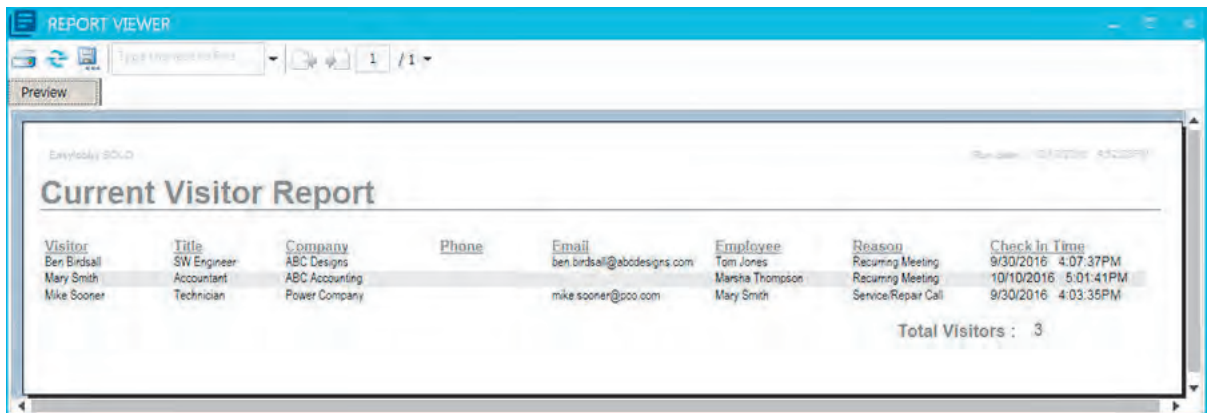
4.1.1 Current Visitor Report

The Current Visitor Report shows all visitors that are currently checked in, but not checked out.

1. Select the **Reports & Alerts > Current Visitor Report** icon.



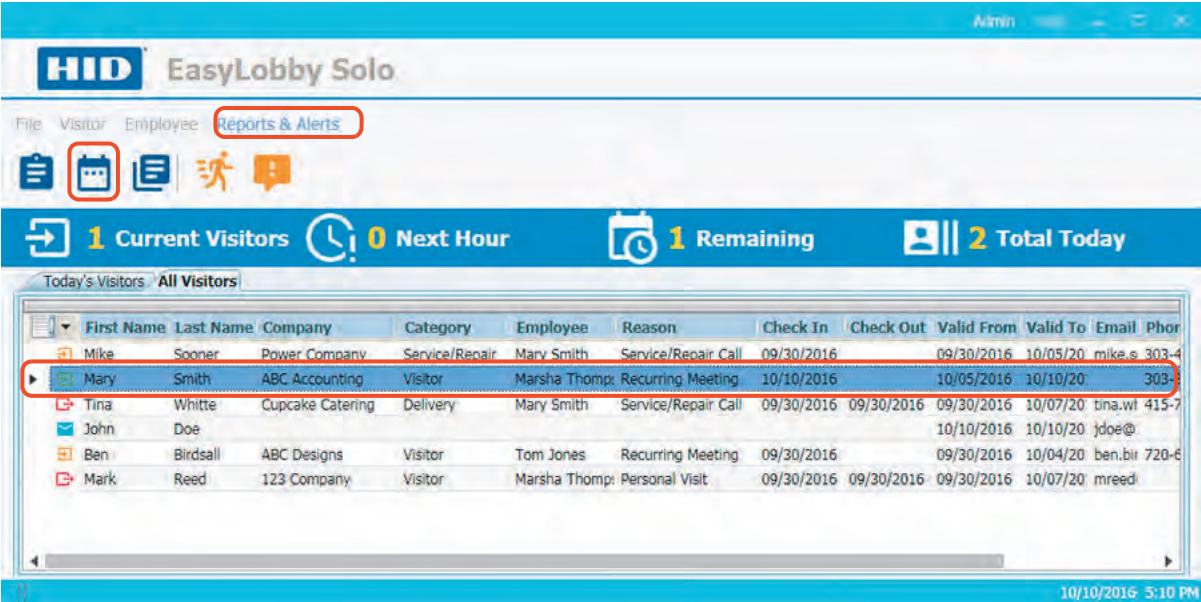
2. The Current Visitor Report is displayed.



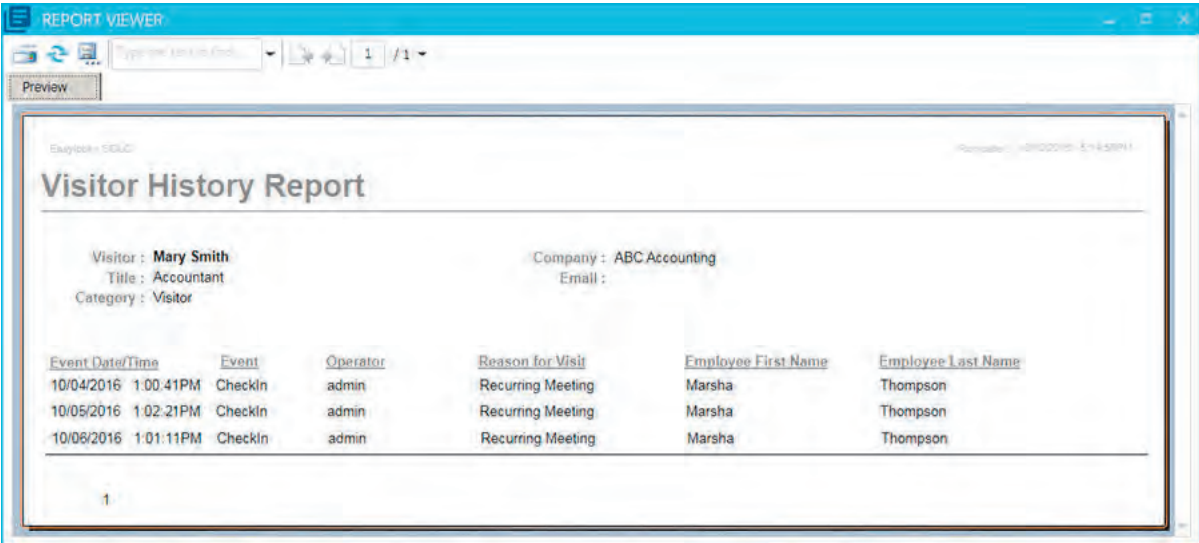
4.1.2 Visit History Report

The Visit History Report shows the history of the visits of a selected visitor.

1. Select a visitor name from the current visitor list.
2. Select the **Reports & Alerts > Visit History Report** icon.



3. The report is displayed with the history of the selected visitor.



4.1.3 Employee List Report

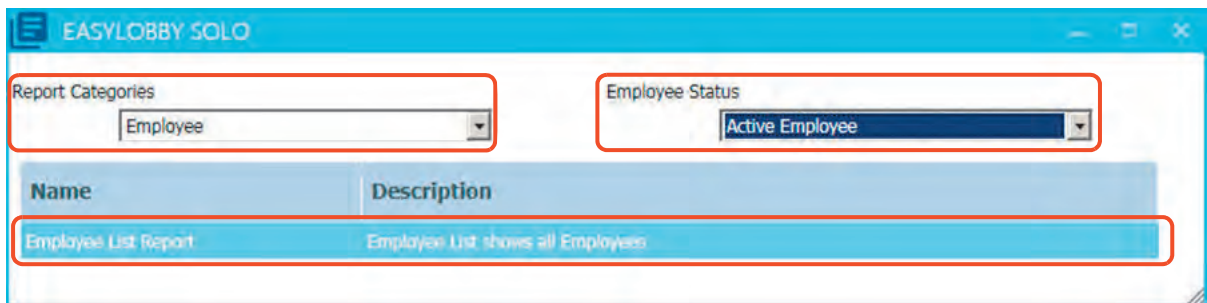
The Employee List Report has three options:

- All Employees
- Active Employees
- Inactive Employees.

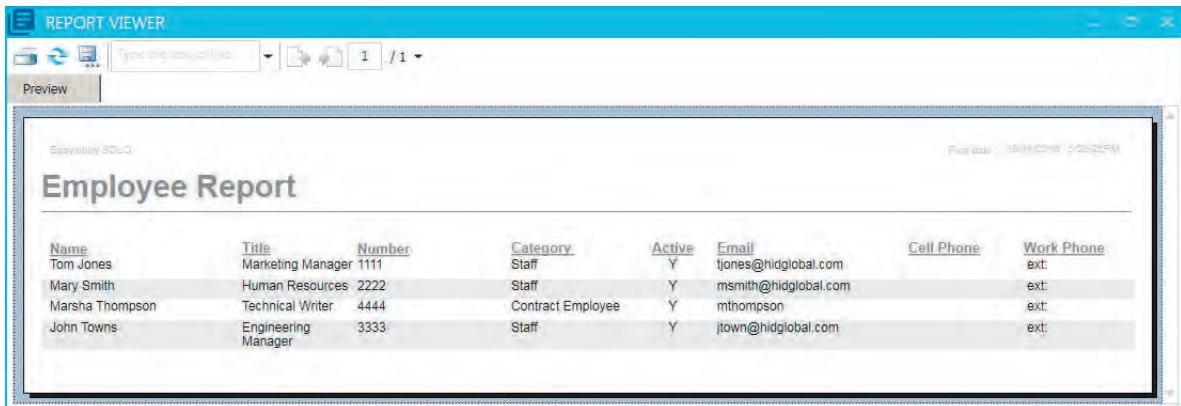
1. Select the **Reports & Alerts > Launch Report Viewer** icon.



2. Select **Employee** from the Report Categories pull-down menu.
3. Select an **Employee Status** from the pull-down menu.
4. Double-click the **Employee List Report**.



5. The Employee Report is displayed.

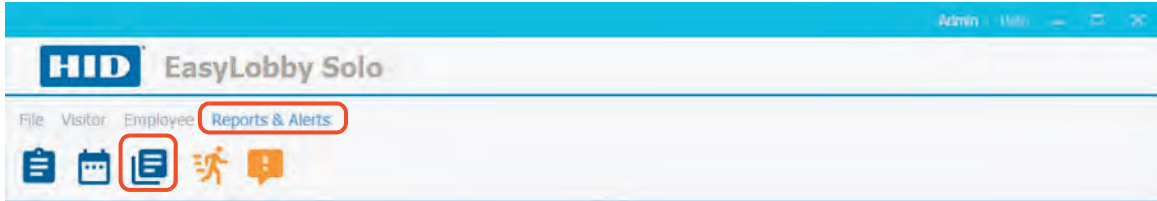


Name	Title	Number	Category	Active	Email	Cell Phone	Work Phone
Tom Jones	Marketing Manager	1111	Staff	Y	tjones@hidglobal.com		
Mary Smith	Human Resources	2222	Staff	Y	msmith@hidglobal.com		ext:
Marsha Thompson	Technical Writer	4444	Contract Employee	Y	mthompson		ext:
John Towns	Engineering Manager	3333	Staff	Y	jtown@hidglobal.com		ext:

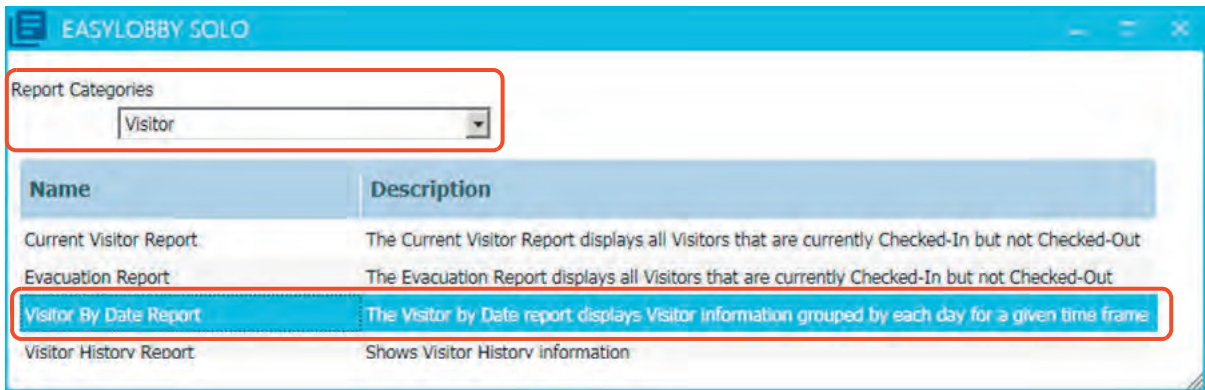
4.1.4 Visitor By Date Report

The Visitor By Date Report shows visitor information grouped by each day for a given time frame.

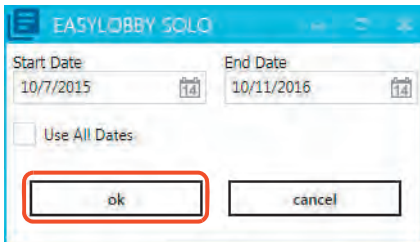
1. Select the **Launch Report Viewer** icon.



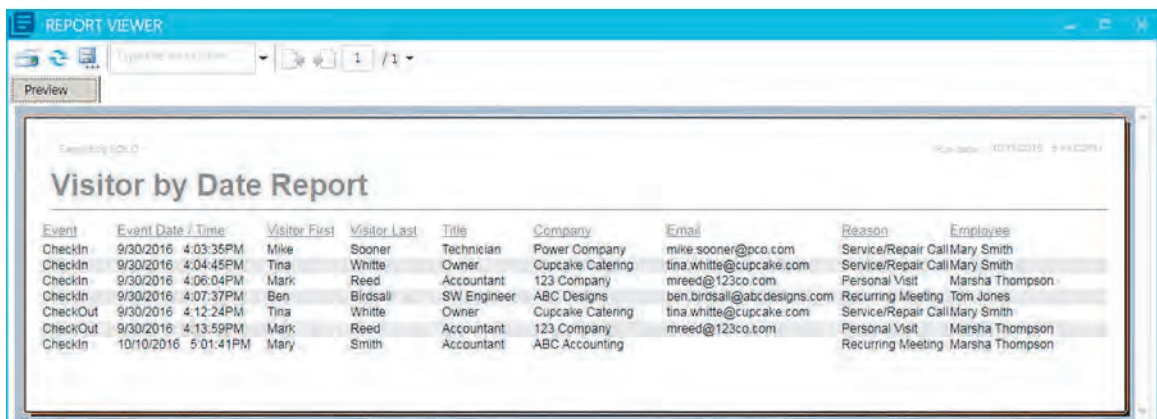
2. Select **Visitor** from the Report Categories pull-down menu.
3. Double-click the **Visitor By Date Report**.



4. Enter the date range for the report and click **OK**.



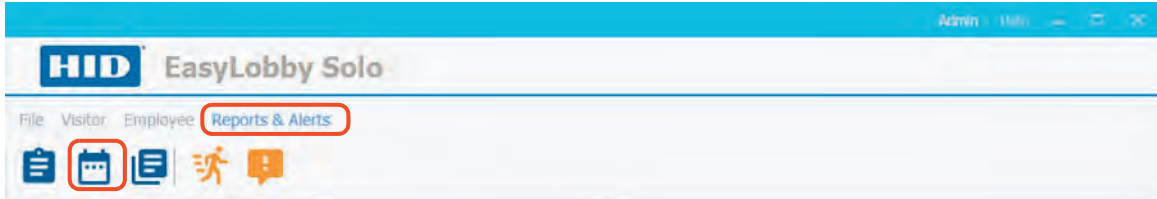
5. The Visitor by Date Report is displayed.



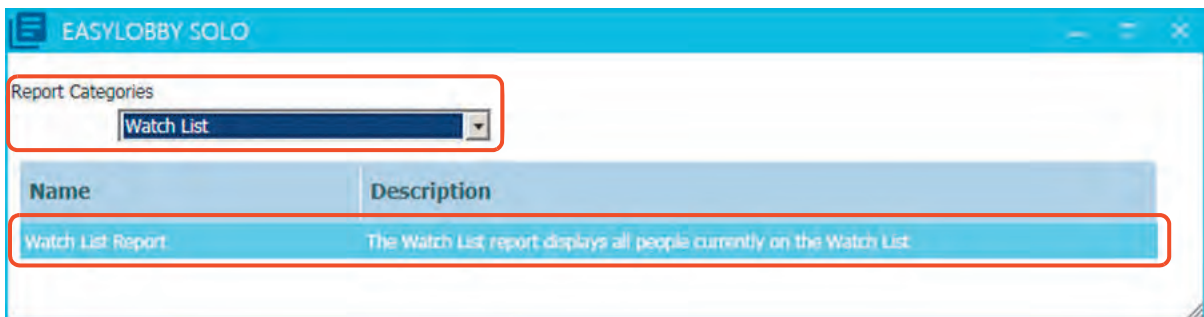
4.1.5 Watch List Report

The Watch List Report shows all individuals or groups currently on the Watch List.

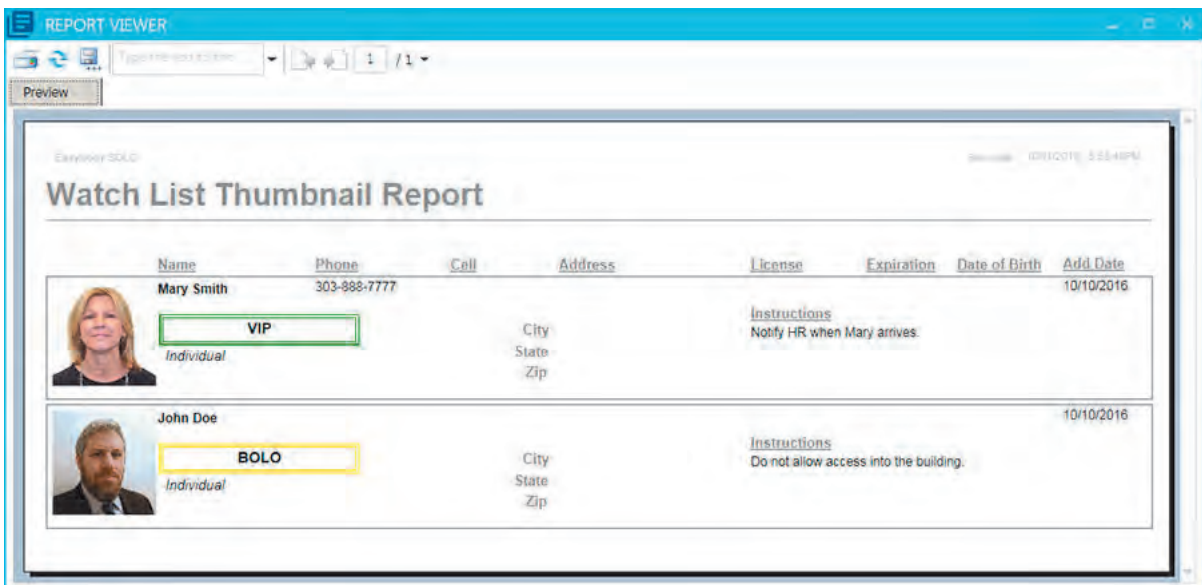
1. Select the **Launch Report Viewer** icon.



2. Select **Watch List** from the Report Categories pull-down menu.
3. Double-click the **Watch List Report**.



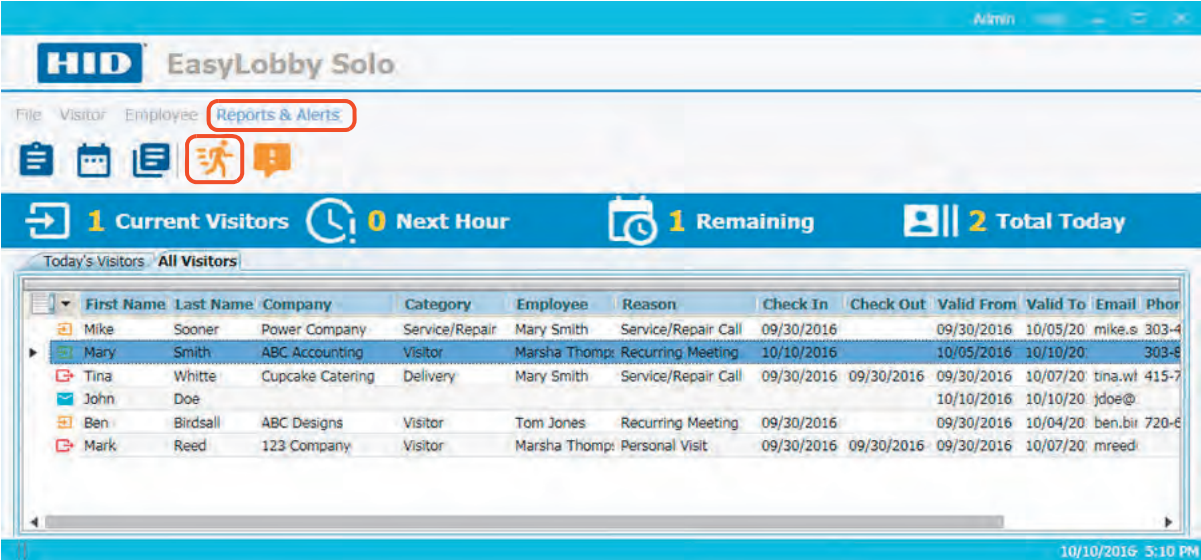
4. The Watch List Thumbnail Report is displayed.



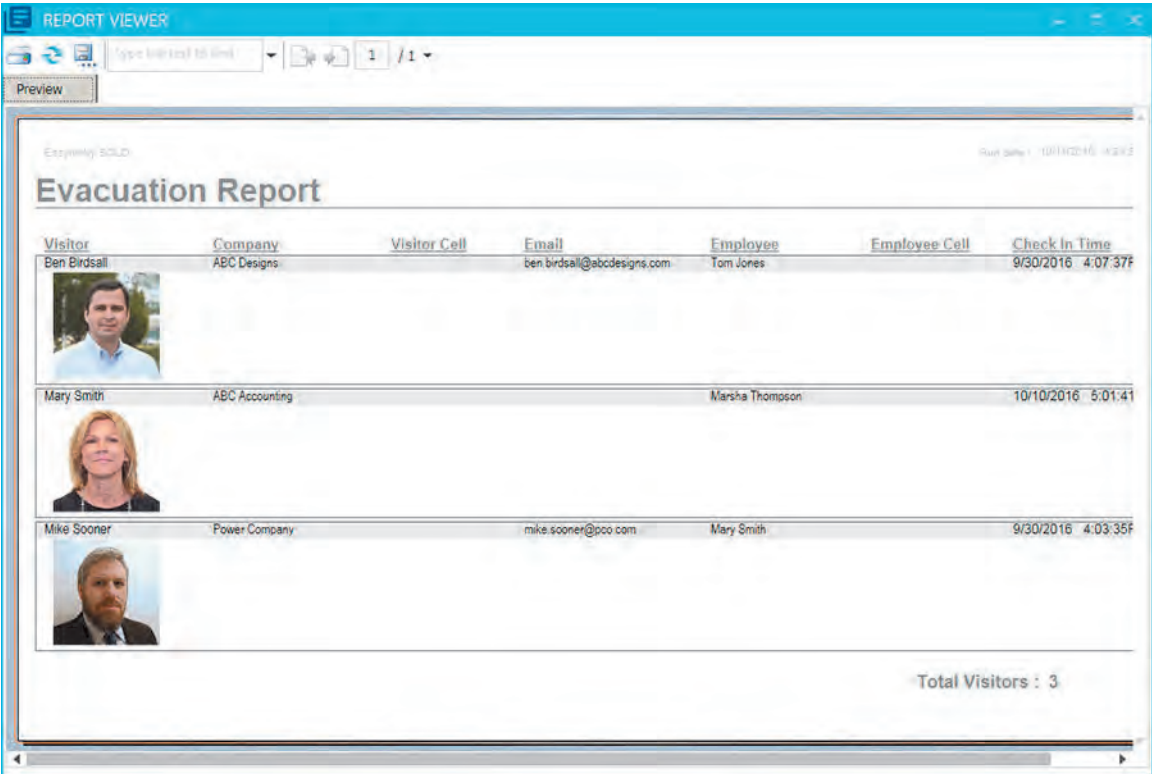
4.1.6 Evacuation Report

The Evacuation Report shows all visitors that are currently checked in, but not checked out.

1. Select the **Reports & Alerts > Evacuation Report** icon.

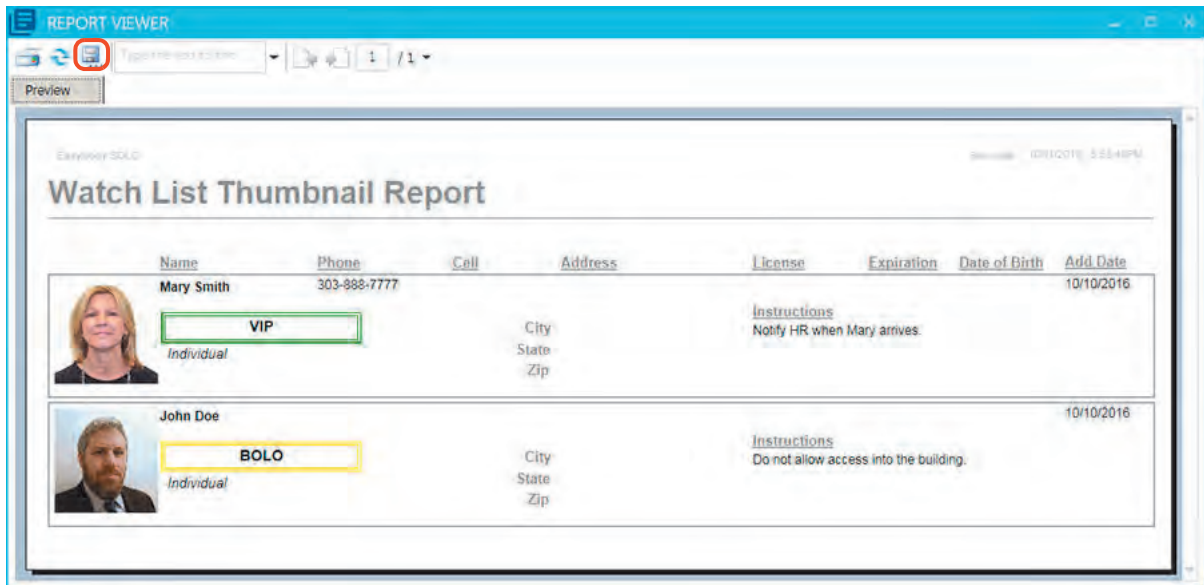


2. The Evacuation report is can be printed to assist with evacuation identification and accountability.

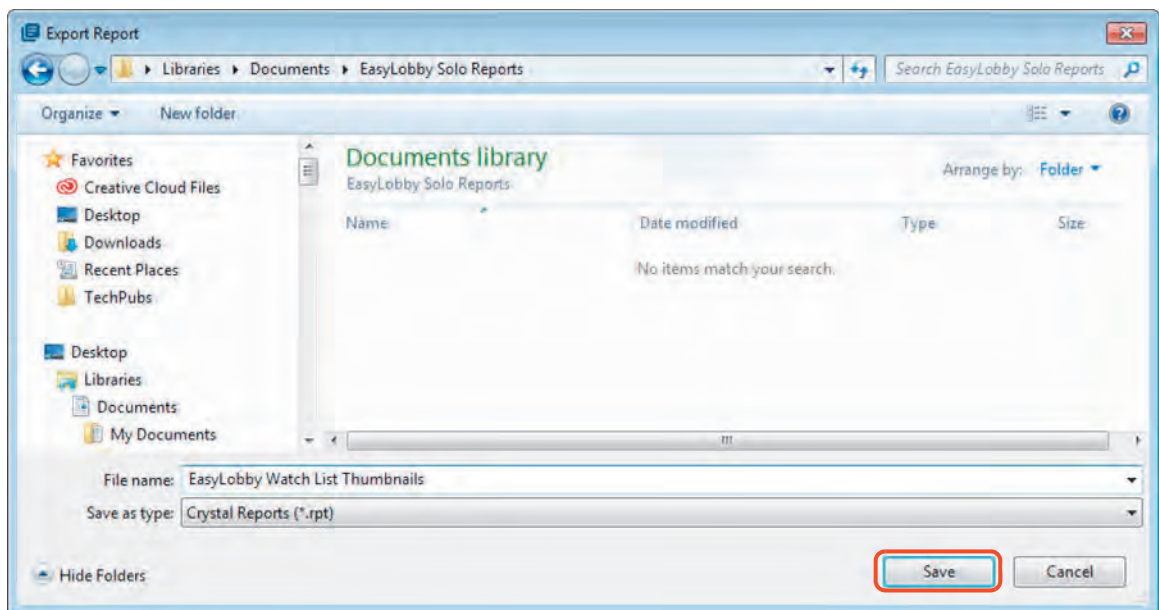


4.2 Export a Report

1. From the **REPORT VIEWER** window, select the **Export Report** icon.



2. Navigate to the location to store the file. Enter a file name and click **Save**.

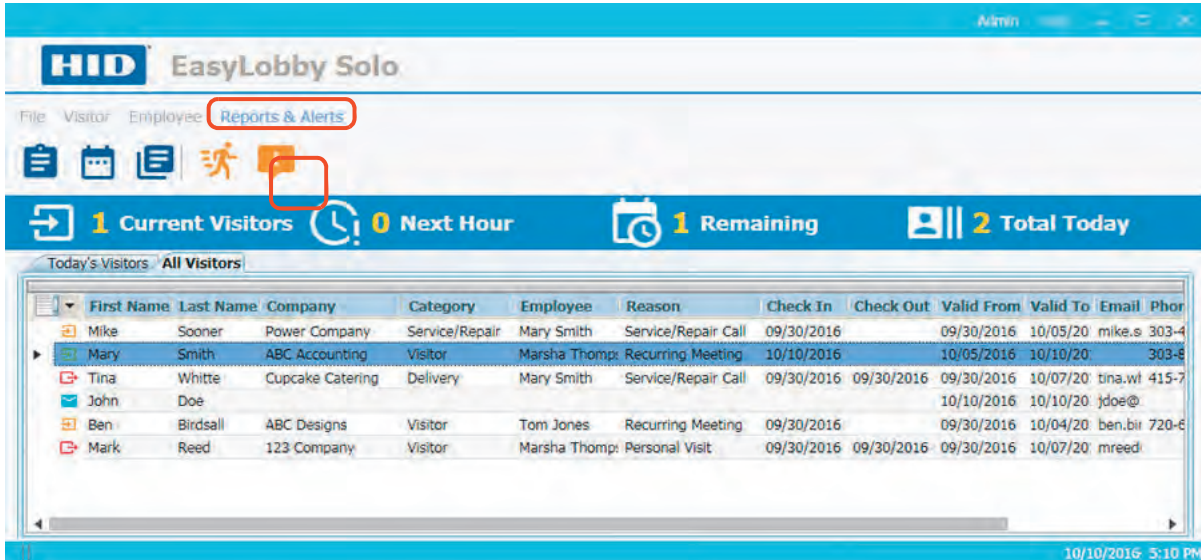


3. Click **OK**.

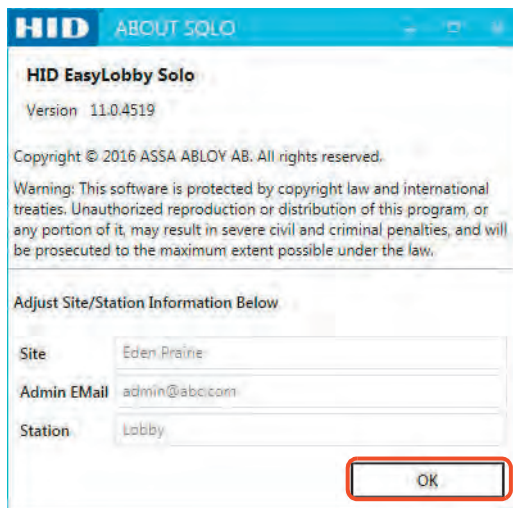
4.3 Send an Email Alert

This option sends an immediate alert to the site administrator email address provided during installation. Additional email addresses can be specified in the Program Options. See *Section 6.4: Update Email Settings*.

Select the **Reports & Alerts > Send Alert Email** icon.



- To edit the site administrator email address select the **Help > ABOUT > About** menu.
Note: The user must be an administrator to change this email address.
- Click **OK**.



Chapter 5

Visitor, Employee, and Other Lists

The List options are used to customize the drop-down lists for the Visitor and Employee forms. EasyLobby Solo is configured with default lists, which can be modified by an administrator to meet the needs of the site. An administrator can add, edit, and delete list items as well as customize the display order for each list.

The screenshot displays the HID EasyLobby Solo software interface. The top navigation bar includes 'Admin' and 'Help' menus. Below the navigation bar, there are status indicators: '1 Current Visitors', '0 Next Hour', and '2 Remaining'. The main content area shows a table titled 'Today's Visitors' with the following data:

First Name	Last Name	Company	Category	Employee	Reason	Check In	Cl
Josh	Lyman	TVA Security Servies	Visitor	Marsha Thompson	Recurring Meeting		
Jed	Bartlett	Support Services	Visitor	Mary Richards	Recurring Meeting	10/21/2016 1	
Gloria	Stivic	XYZ Insurance	Visitor	Marsha Thompson	Sales Call		

The right-hand side of the interface features a vertical menu with the following options: 'VISITOR LISTS' (expanded), 'EMPLOYEE LISTS', 'OTHER LISTS', 'OPTIONS', and 'MANAGEMENT'. Under 'VISITOR LISTS', there are sub-options: 'Visitor Categories', 'Reasons', 'Clearances', and 'Watch List'. The 'Admin' menu item at the top right is also highlighted with a red box.

5.1 Customize Lists

The following are the lists and the defined settings provided. Additional settings can be added to any of the lists except watch lists.

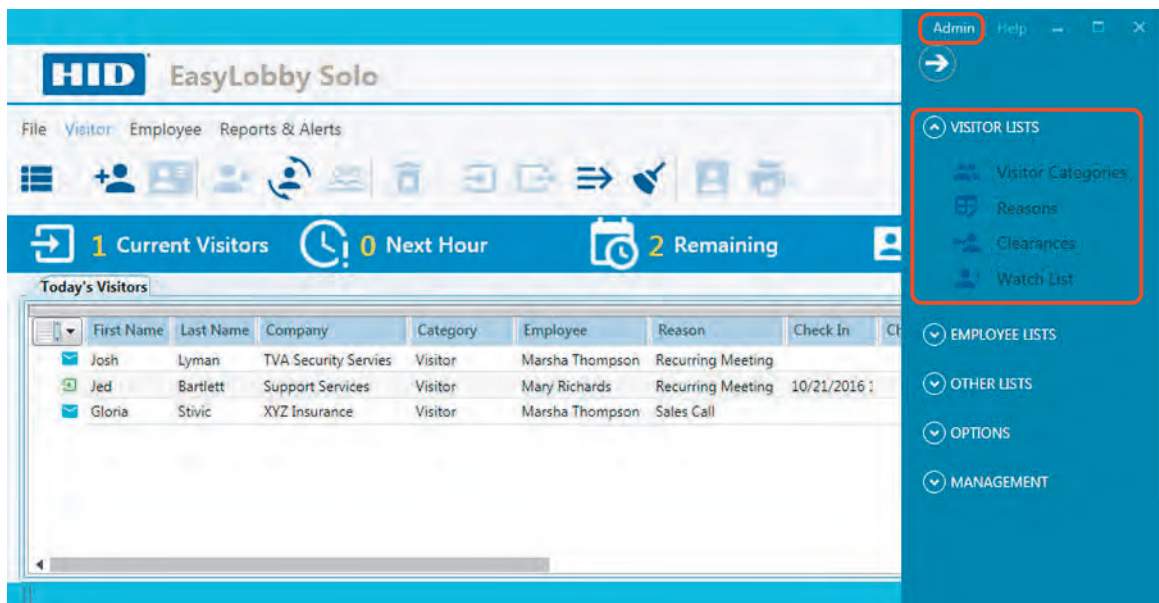
Lists	Description
Visitor Lists	
Visitor Categories	Specifies the types of visitors. The defined Visitor Categories are Contractor, Delivery, Employee, Personal Visitor, Service/Repair, Visitor, and Volunteer.
Reasons	Specifies a general cause for the visit. The defined Reasons are Meeting, Personal Visit, Recurring Meeting, Sales Call, and Service/Repair Call.
Clearances	Specifies the areas a visitor is authorized to enter. The defined Clearances are All Access and Public Areas Only.
Watch List	Specifies an individual, company, or country to give special consideration. Available categories are: BOLO (Be On the Look Out), Malicious Person , and VIP . See <i>Chapter 3: Add to Watch List</i> . for detailed information.
Employee Lists	
Employee Categories	Specifies the type of employee. The defined Employee Categories are Board of Directors Member, Contract Employee, Intern, and Staff.
Companies	Specifies business names of your company or your location. The first entry in this list is populated with the company name entered during installation.
Departments	Specifies the reporting unit or subdivision for employees. The defined Departments are Accounting, Building & Food Services, Engineering, Finance & Accounting, Human Resources, Marketing, Production, and Sales.
Other Lists	
Signature Types	Specifies the types of signatures that can be collected at the visitor check in area. The defined Signature Types are Document Acceptance and Visitor Signature.
Vehicle Types	Specifies vehicle information for visitors and employees. The defined Vehicle Types are Car, SUV, Truck, and Motorcycle.

5.2 Managing Lists

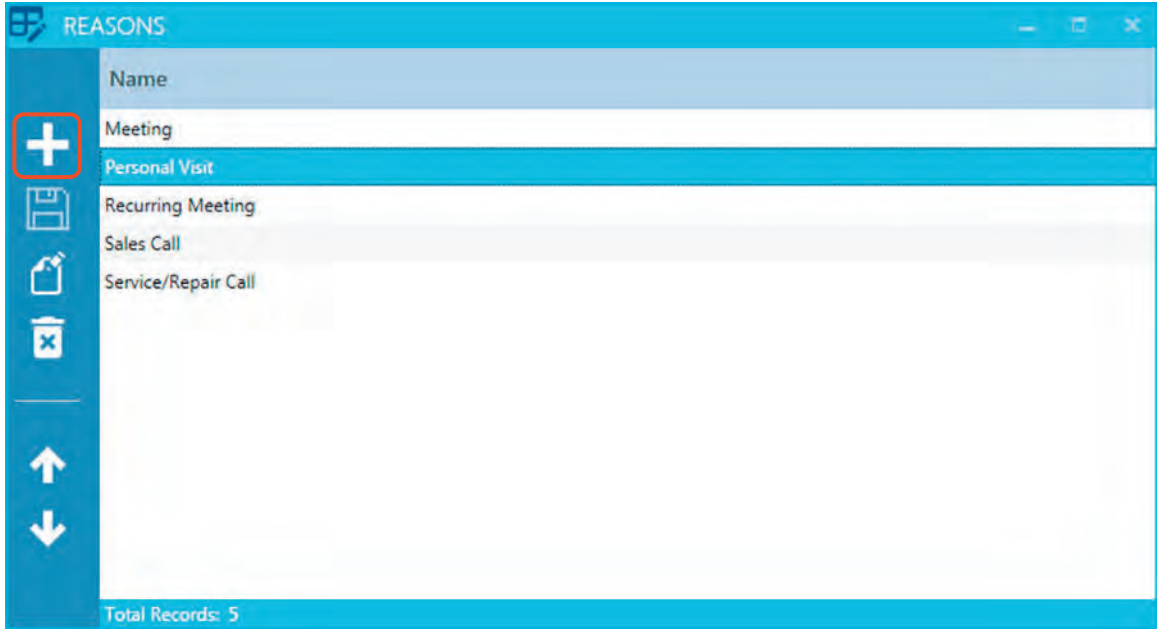
There are multiple lists and all can be customized in the same manner, except for the watch list. See *Section 3.3.1.5: Add to Watch List* for detailed information.

5.2.1 Add a List Entry

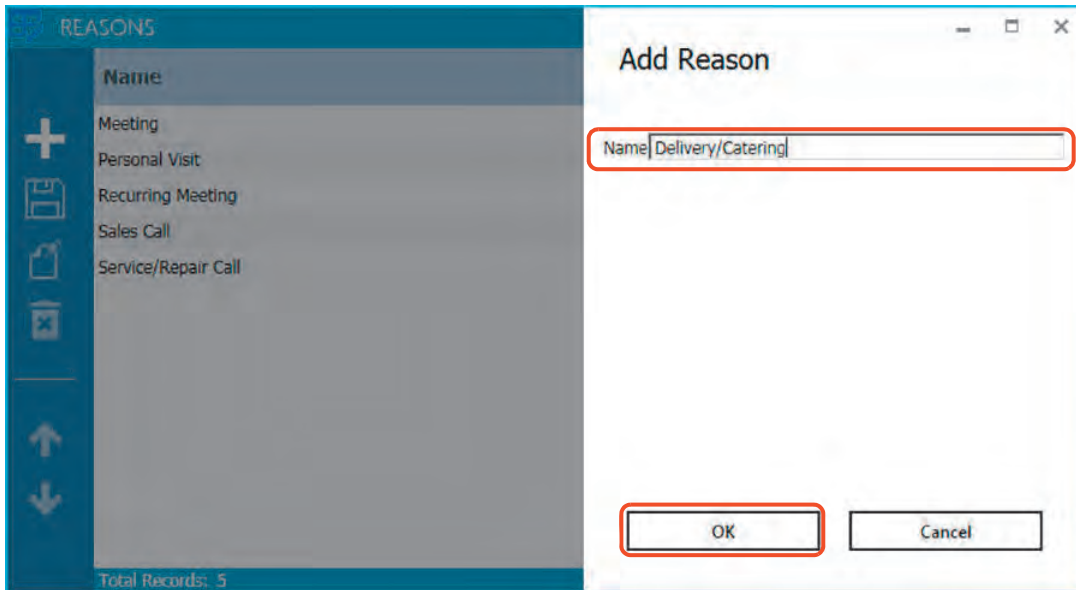
1. Select the **Admin** menu.
2. Select one of the following list categories:
 - Visitor Lists
 - Employee Lists
 - Other Lists
3. Select a List to modify. **Note:** The following example shows **Visitor Lists > Reasons**.



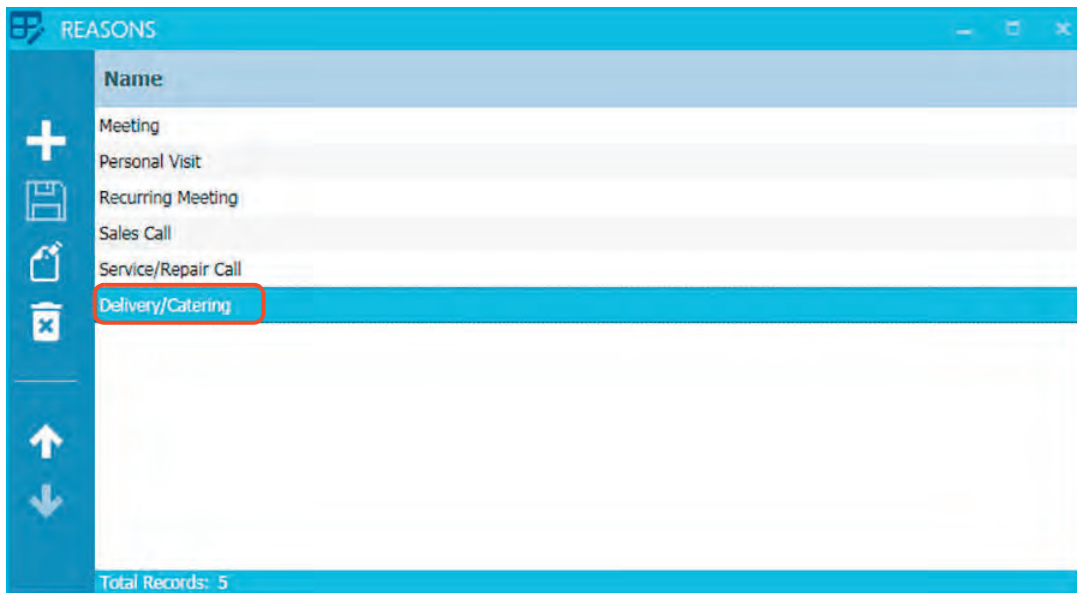
4. Click **Add (+)**.



5. Enter a new option in the **Name** field, and click **OK**.

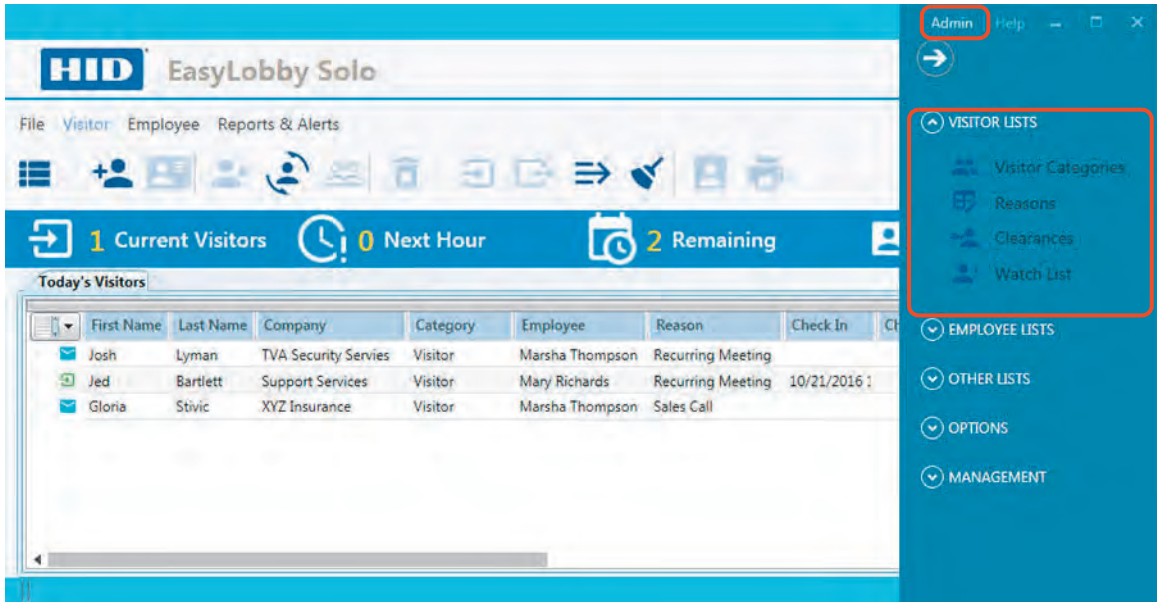


6. The new option is added to the list and appears in the drop-down list when filling out the Visitor form field.

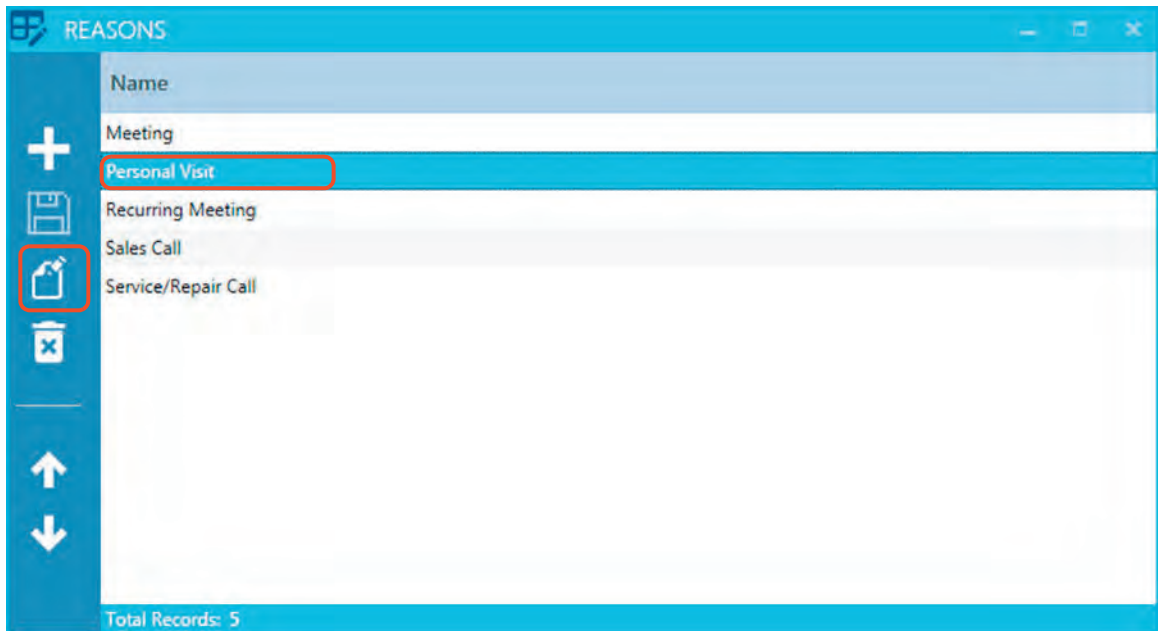


5.2.2 Edit a List Entry

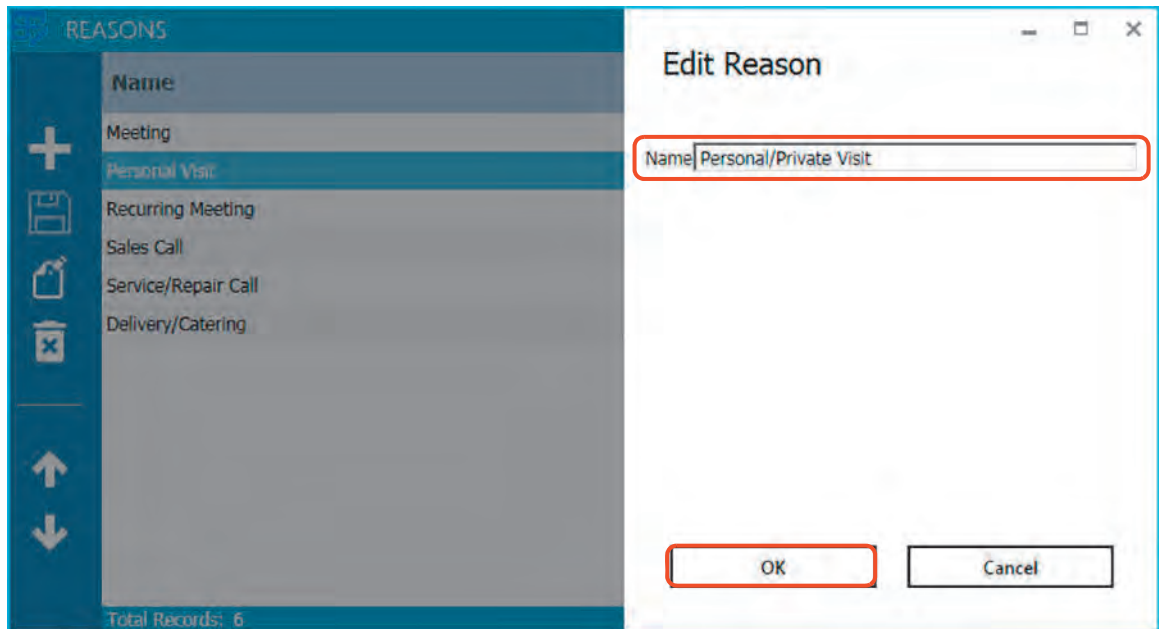
1. Select a list to modify.



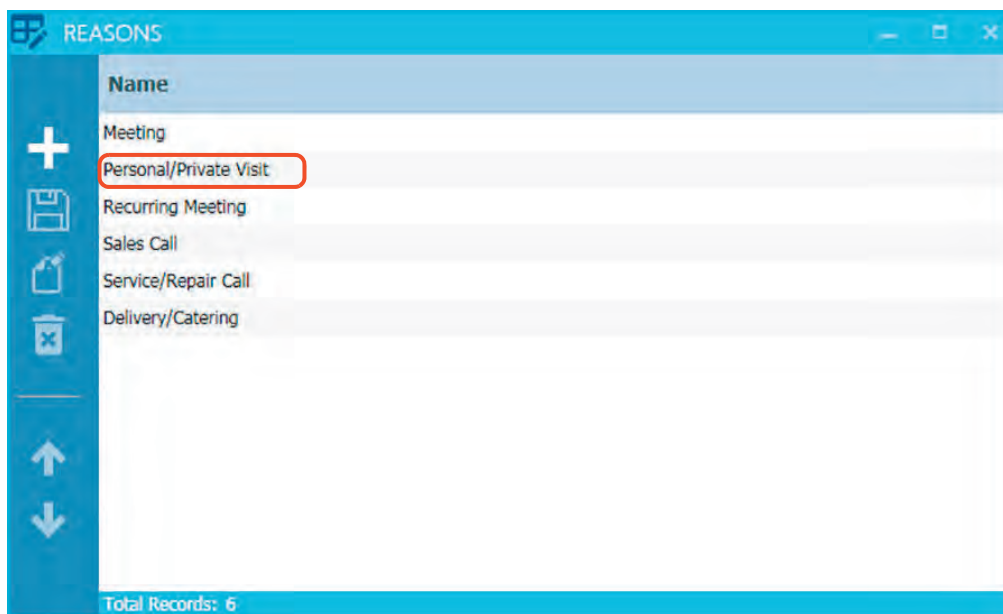
2. Click **Edit**.



3. Modify the **Name** field and click **OK**.



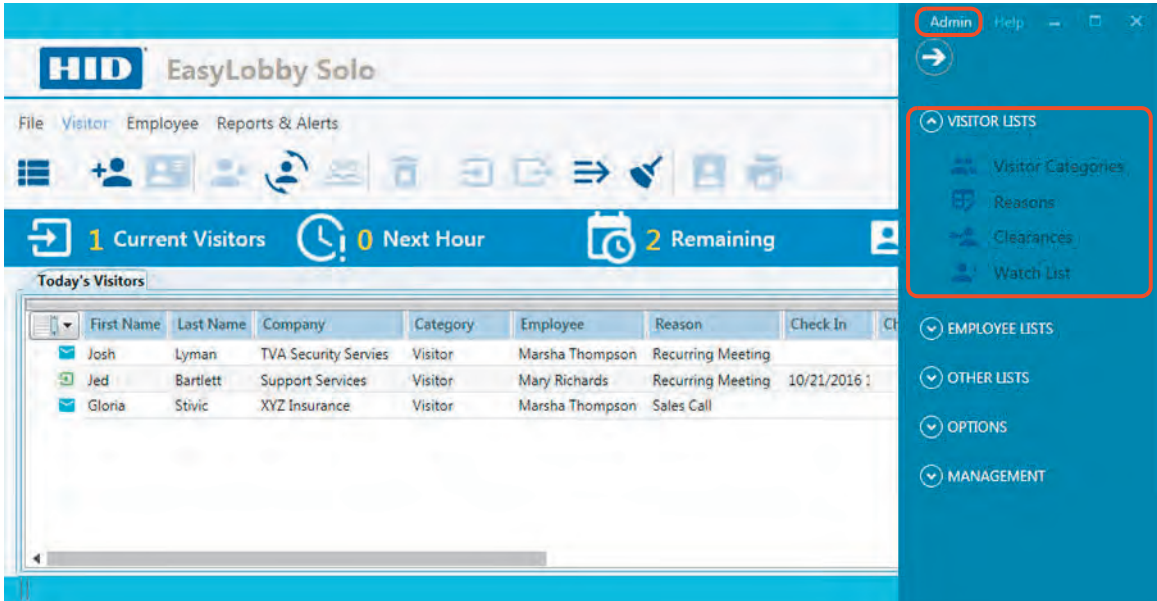
4. The modified option is changed on the list and appears in the drop-down list when filling out the Visitor form field.



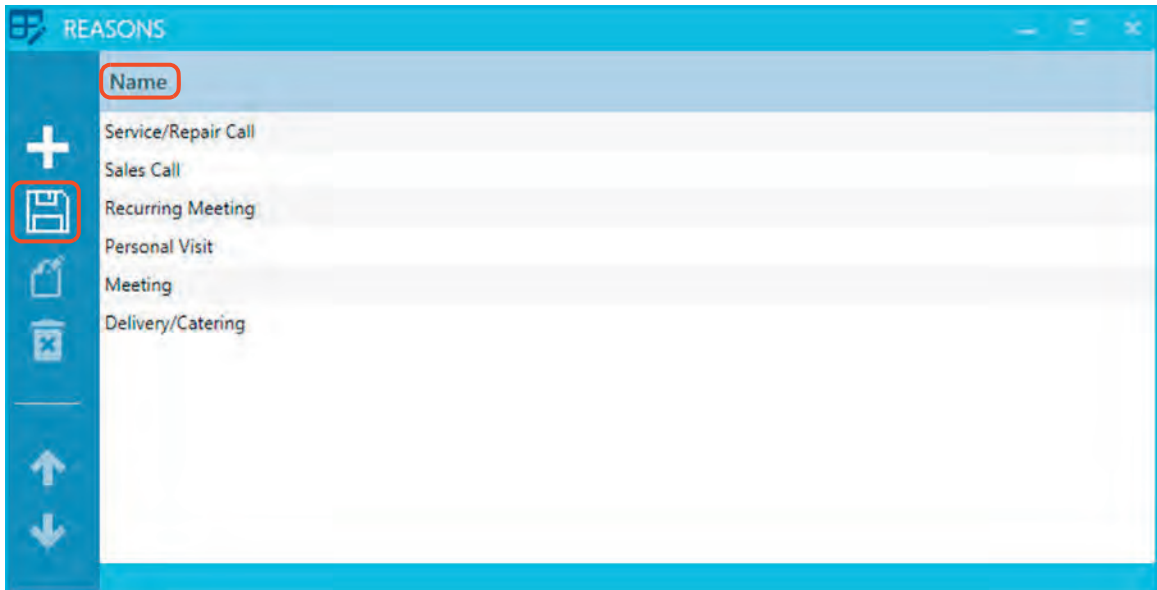
5.2.3 Re-order List Entries

The order the items appear in these lists match the order displayed in the drop-down lists when filling out the Visitor form. The lists can be ordered alphabetically (A-Z or Z-A) or in a specified order. For example, you may want to order items that are used most frequently, at the top of the list.

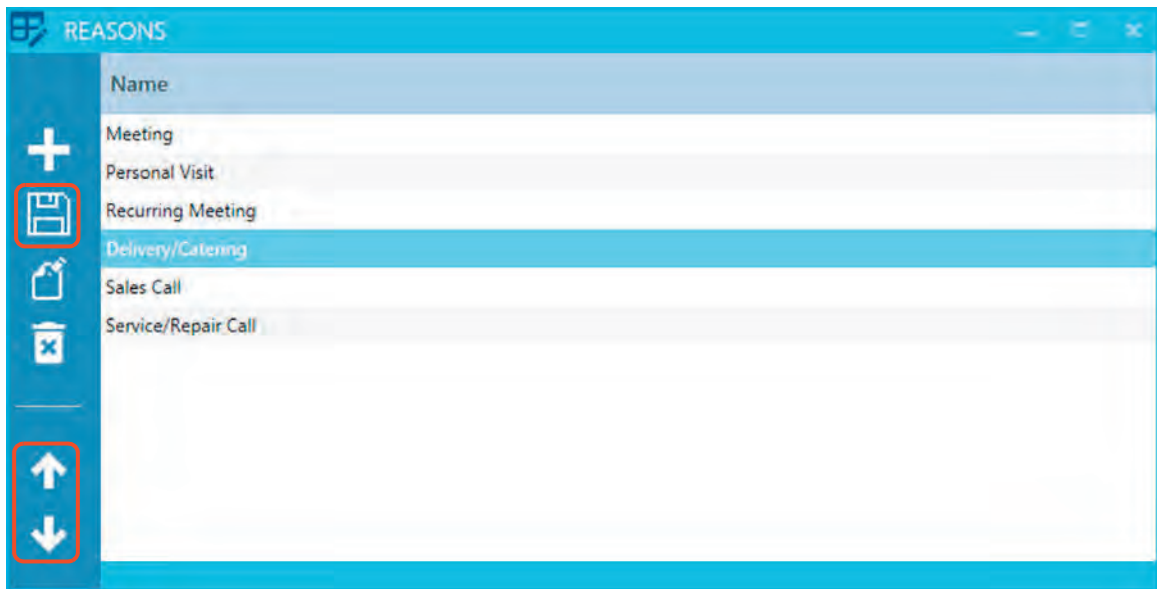
1. Select a list to modify.



2. Click the **Name** heading to sort the list alphabetically (A-Z or Z-A). Click **Save**.



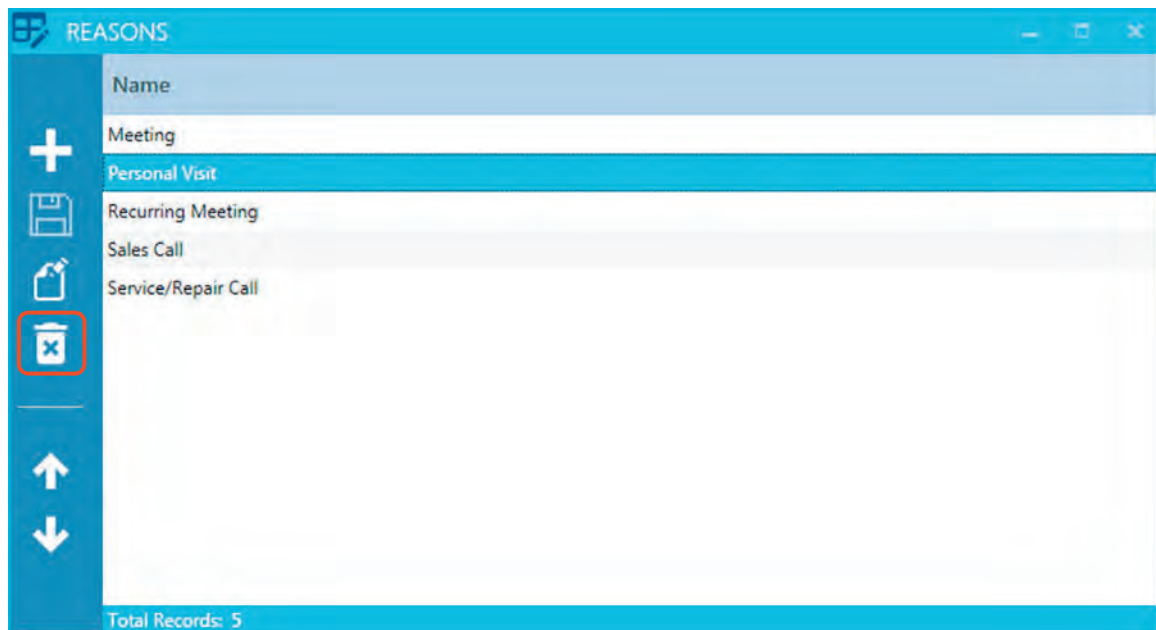
3. Select the item to move and click **Move Up** or **Move Down** until the item is in the desired location. Click **Save**.



5.2.4 Delete a List Entry

If the user determines that a list item is no longer needed, it can be deleted from the list.

1. Select a list with an option to delete.
2. Select the entry and click **Delete**.
Note: A option that is in use cannot be deleted.
3. Click **Delete** to confirm.



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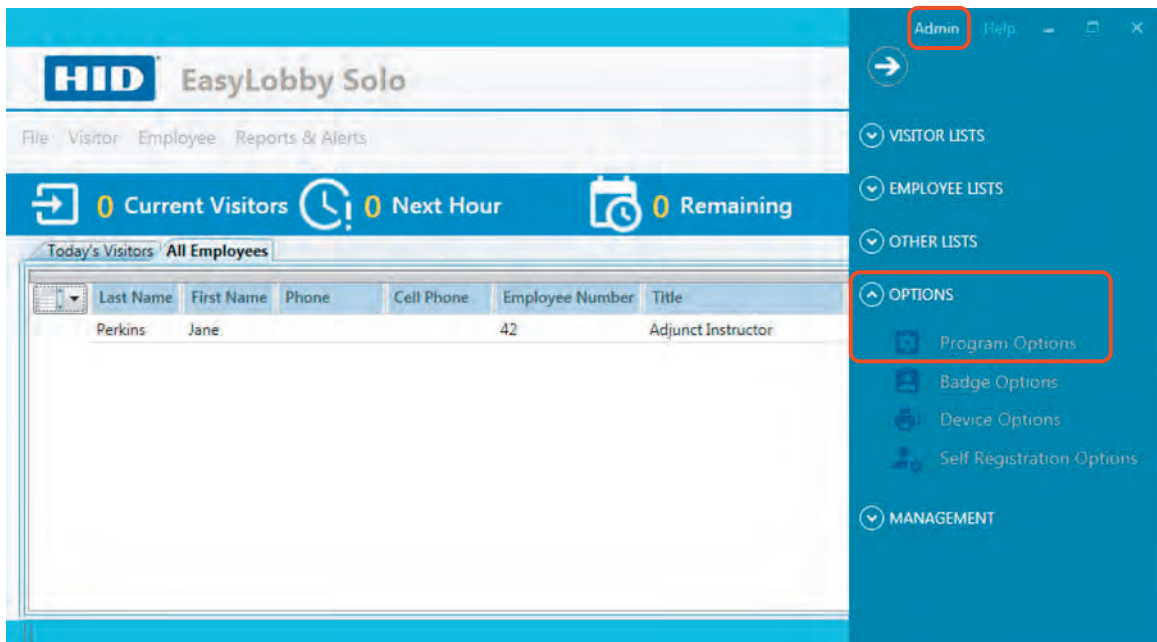
Chapter 6

Program Options

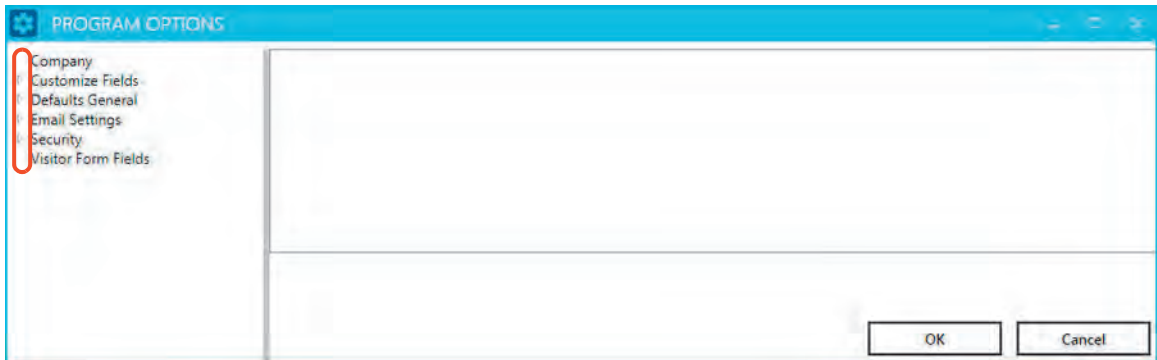
An administrator can set up and customize EasyLobby Solo to meet the requirements of the site. Many of these options are set so that EasyLobby Solo can be used out-of-the-box. If the site requires customizations, an administrator can easily change the default and installation settings such as field names on the Employee and Visitor forms, visitor identification number, email alerts, and security options.

Note: Whenever a field option has been changed within the Program Options, it is displayed in bold type.

1. On the Main window, select **Admin > OPTIONS > Program Options**.



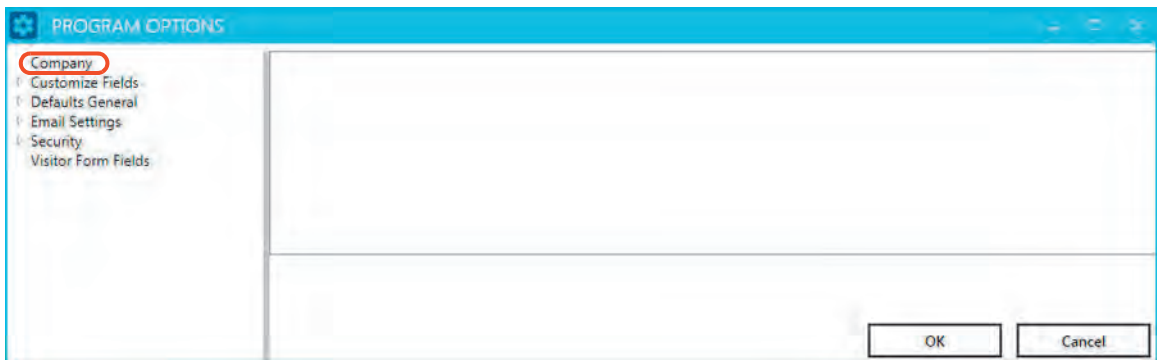
2. On the **PROGRAM OPTIONS** window, click the expansion symbol next to the section to open the menus and option lists.



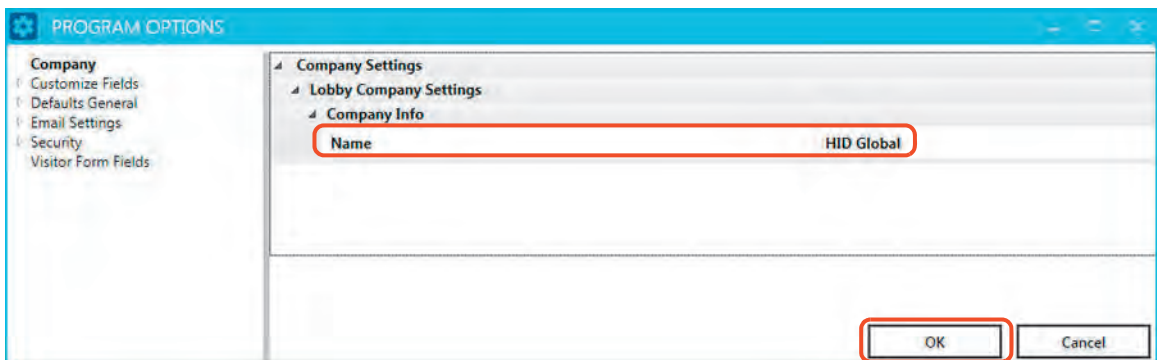
6.1 Update Company Name

The company name is entered during installation and is displayed on the Employee form and printed on the visitor badge. This option allows you to change the company name.

1. On the **PROGRAM OPTIONS** window, click **Company**.

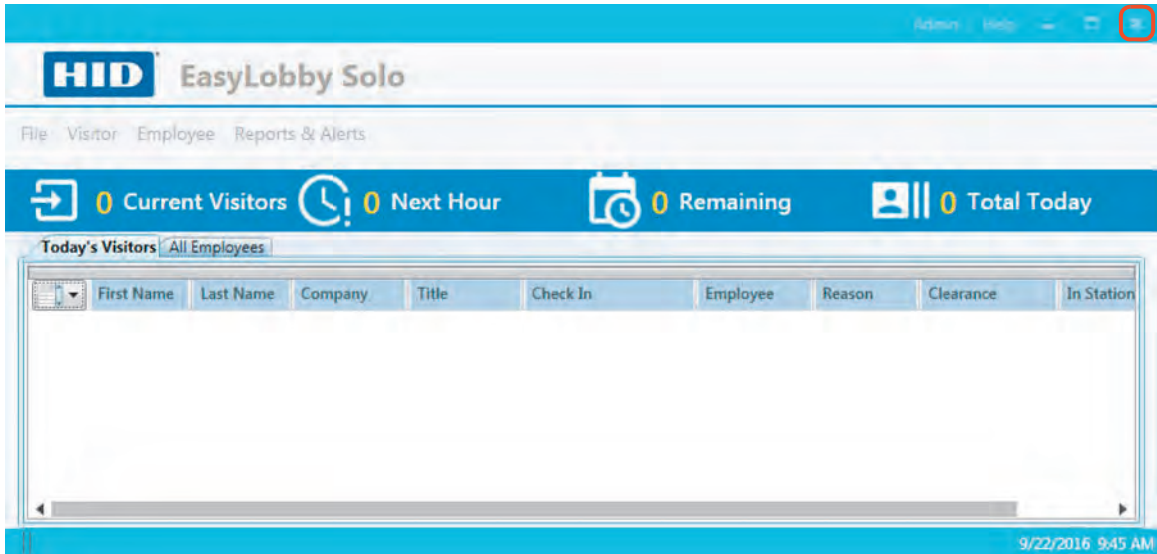


2. Update the **Name** field and click **OK**.



3. The **Changes Saved** window is displayed to indicate that the application must be restarted for the options to take effect. Click **OK**.

4. On the Main window click **Close** to restart the application.



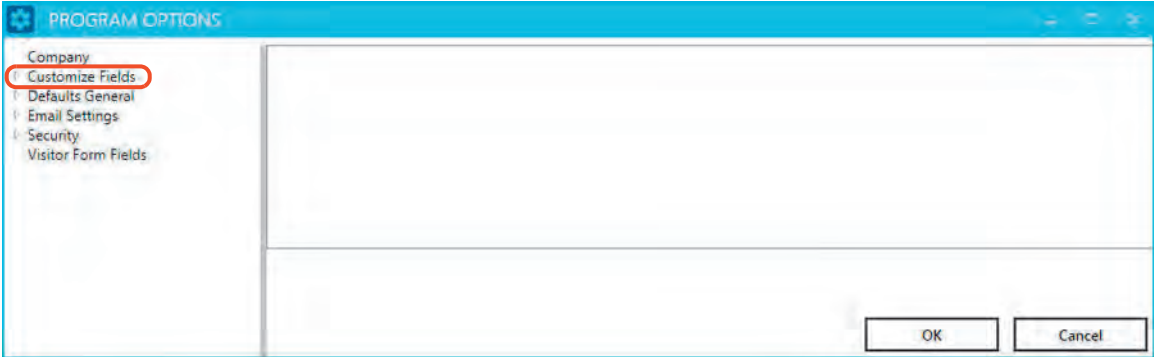
6.2 Customize Form Fields

Data fields on the Employee and Visitor forms can be changed according to specific business terminology or your local language, if it is not supported. For example, Employee can be changed to Host or Company Name can be changed to Organization.

6.2.1 Employee Field Captions

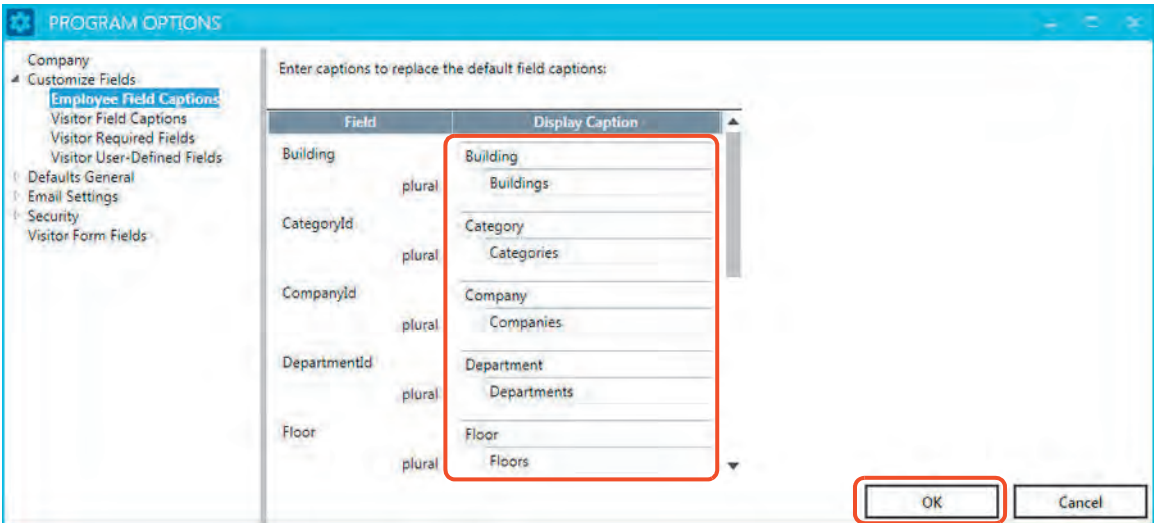
These field captions are renamed on the Employee form. Once a field caption is changed, it is changed throughout EasyLobby Solo. Any field not listed here can be changed through the language editor. See *Section 10.2: Set a Custom Language*.

1. On the **PROGRAM OPTIONS** window, open the **Customize Fields** menu.



2. Select **Employee Field Captions**.
3. Rename any of the field captions and click **OK**.

Note: These fields cannot be blank. When renaming a field caption, both singular and plural forms should be renamed.

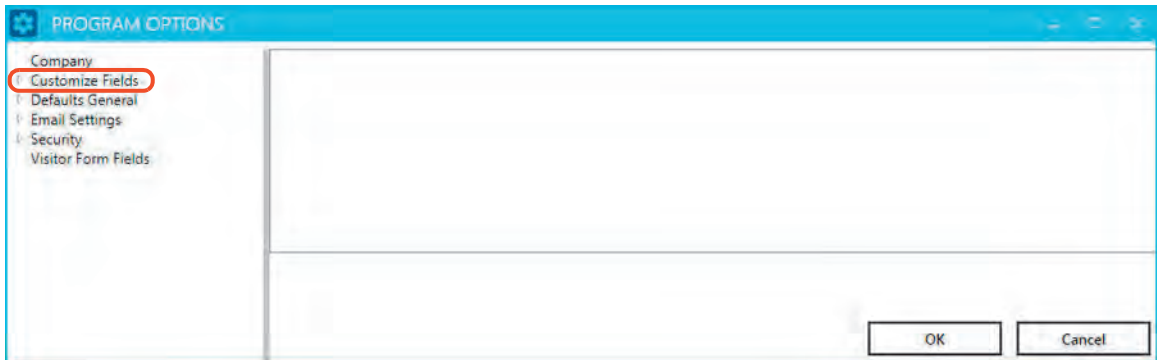


4. The **Changes Saved** window is displayed to indicate that the application must be restarted for the options to take effect. Click **OK**.
5. On the Main window click **Close** to restart the application.

6.2.2 Visitor Field Captions

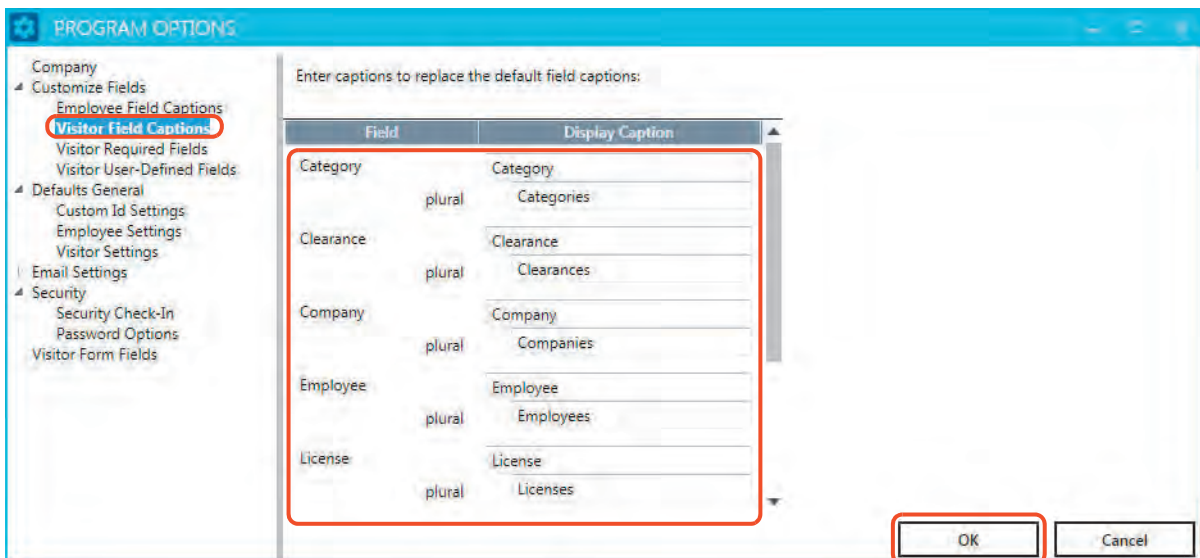
These field captions are renamed on the Visitor form. Once a field caption is changed, it is changed throughout EasyLobby Solo. Any field not listed here can be changed through the language editor. See *Section 10.2: Set a Custom Language*.

1. On the **PROGRAM OPTIONS** window, open the **Customize Fields** menu.



2. Select **Visitor Field Captions**.
3. Rename any of the field captions and click **OK**.

Note: These fields cannot be blank. When renaming a field caption, both singular and plural forms should be renamed.

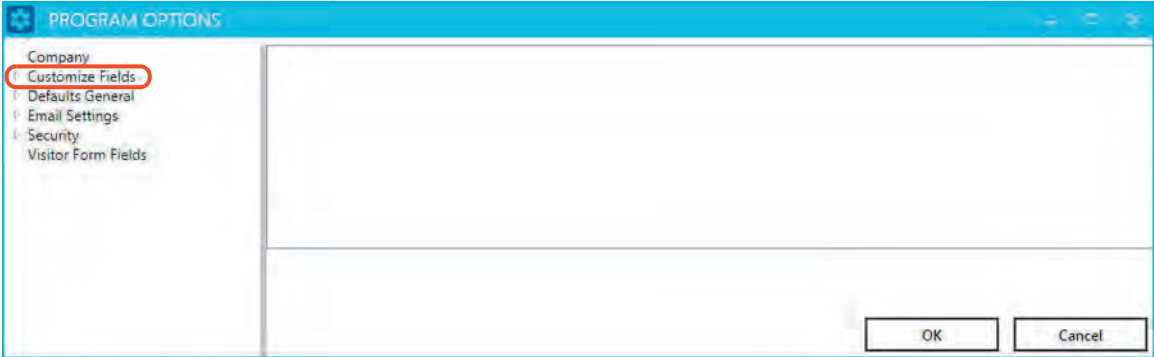


4. The **Changes Saved** window is displayed to indicate that the application must be restarted for the options to take effect. Click **OK**.
5. On the Main window click **Close** to restart the application.

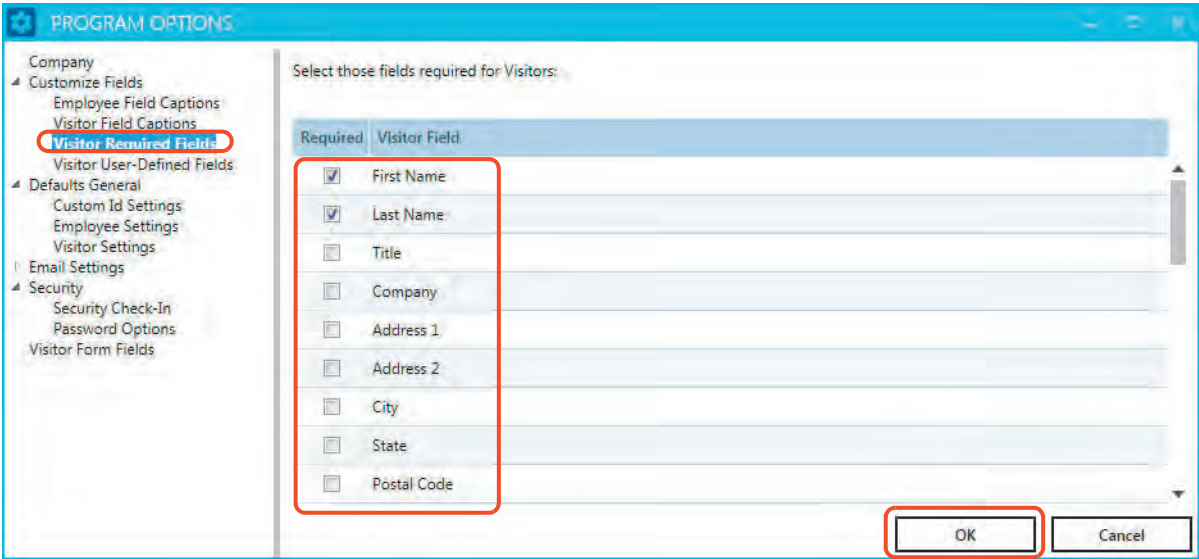
6.2.3 Visitor Required Fields

These are the fields that are required on the Visitor form. These fields are required to preregister or check in a visitor.

1. On the **PROGRAM OPTIONS** window, open the **Customize Fields** menu.



2. Select **Visitor Required Fields**.
3. Select the fields that are required to complete the Visitor form and click **OK**.

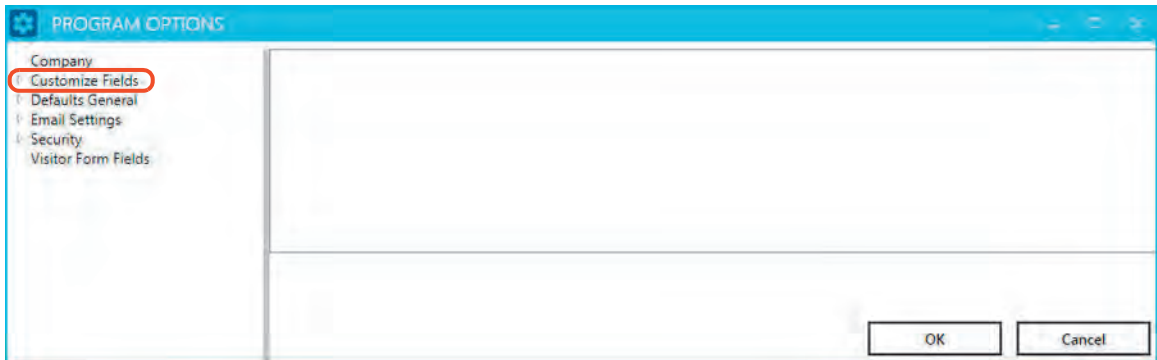


4. The **Changes Saved** window is displayed to indicate that the application must be restarted for the options to take effect. Click **OK**.
5. On the Main window click **Close** to restart the application.

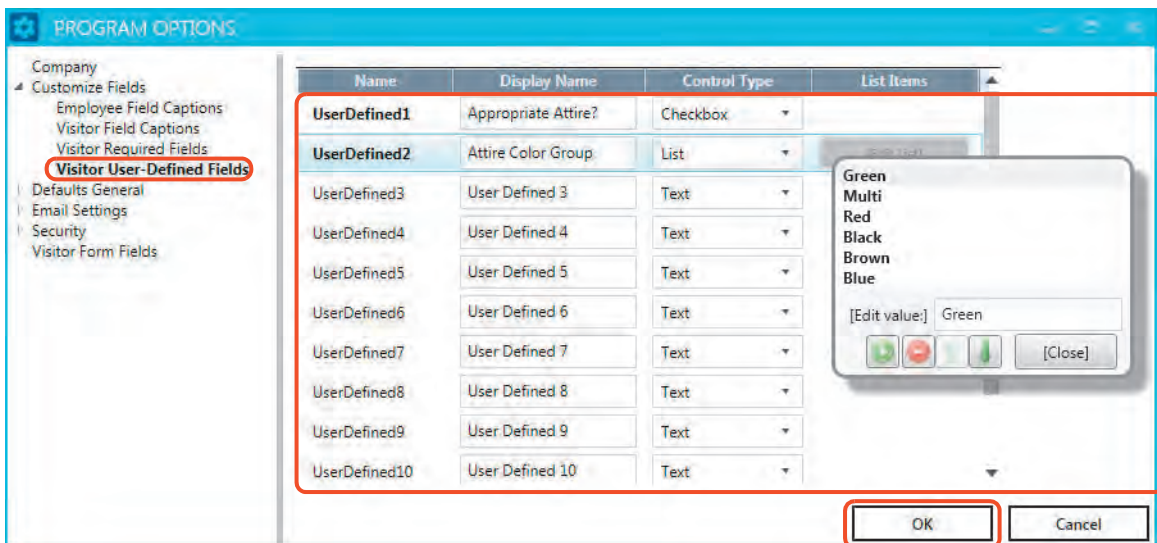
6.2.4 Visitor User-Defined Fields

These fields are created by an administrator to define additional visitor information to collect. Field types that can be established are text fields, check boxes, date/time fields, and drop-down lists. There are 12 fields available.

1. On the **PROGRAM OPTIONS** window, open the **Customize Fields** menu.



2. Select **Visitor User Defined Fields**.
3. Make your updates to the fields and click **OK**.



4. The **Changes Saved** window is displayed to indicate that the application must be restarted for the options to take effect. Click **OK**.
5. On the Main window click **Close** to restart the application.

6.3 Update General Defaults

General defaults allows the Visitor form to be set up to use the most frequently accessed field values. When these default values are set, an operator only needs to change the setting when a visitor does not use that common value. For example, if most visit reasons are meetings, then this is set as the default and that field is only changed when a different visit reason is necessary.

Custom Id Settings: Defines the unique custom identifier for every visitor that is checked in. This value appears on the Visitor form under the Badge tab.

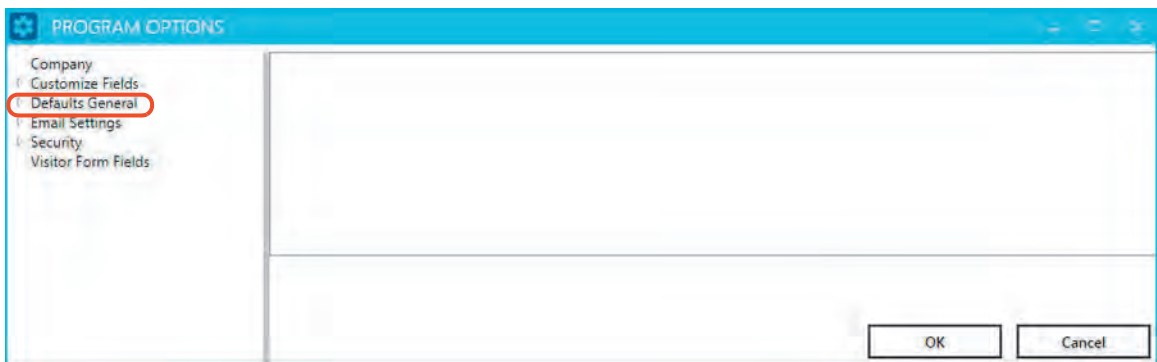
Employee Settings: Prohibits visitor check in for an inactive employee host. Also allows an alert message to be displayed if the First Name and Last Name of a visitor matches the First Name and Last Name of an inactive employee.

Visitor Settings: Defines a series of field settings for the Visitor form and the check in process.

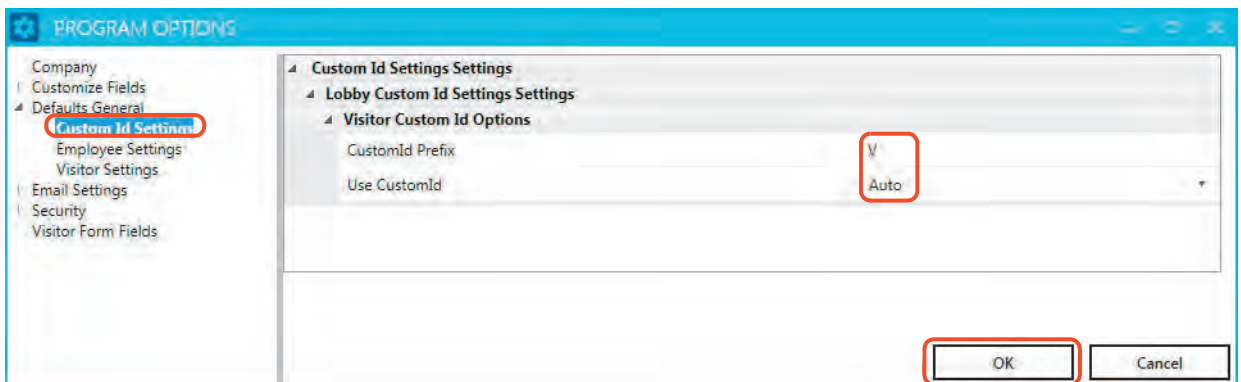
6.3.1 Custom ID Settings

These settings define the unique custom identifier for every visitor that is checked in. This value appears on the Visitor form under the Badge tab.

1. On the **PROGRAM OPTIONS** window, open the **Defaults General** menu.



2. Select **Custom Id Settings**.
3. Make your updates to the fields and click **OK**.



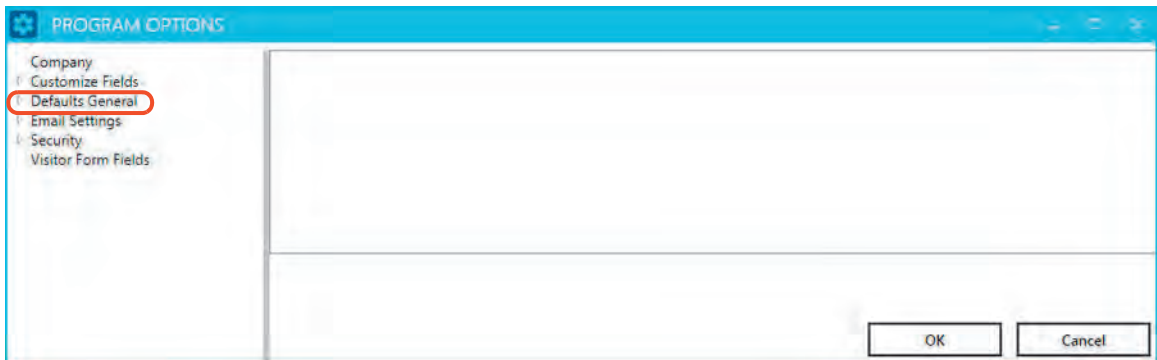


Field	Description
Visitor Custom Id Options	
CustomId Prefix	The prefix for the custom ID to identify a visitor.
Use CustomId	The badge identification generated by the system. Available Settings are Auto or None.

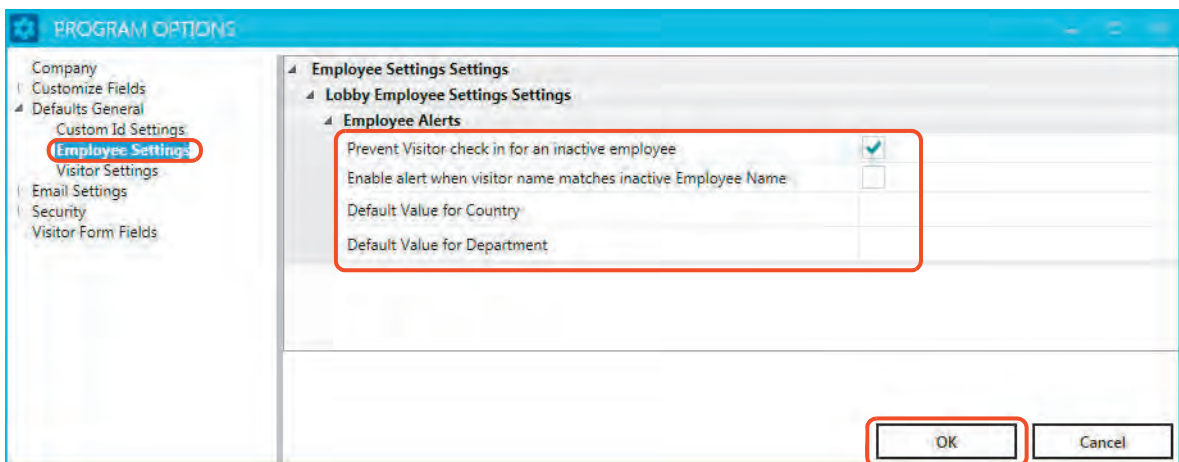
4. The **Changes Saved** window is displayed to indicate that the application must be restarted for the options to take effect. Click **OK**.
5. On the Main window click **Close** to restart the application.

6.3.2 Employee Settings

1. On the **PROGRAM OPTIONS** window, open the **Defaults General** menu.



2. Select **Employee Settings**.
3. Make your updates to the fields and click **OK**.

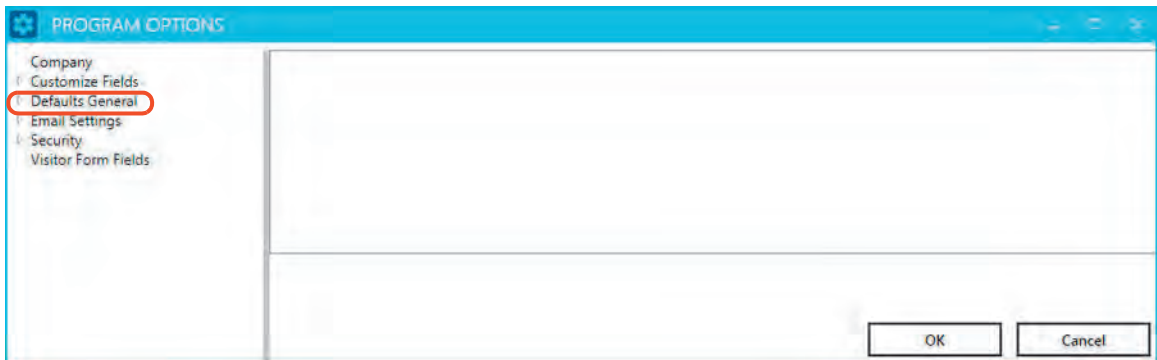


Field	Description
Employee Alerts	
Prevent Visitor check in for an inactive employee	If selected, this option is initiated during visitor check in. If a visitor name matches the First Name and Last Name of an inactive employee, the user is given the following options to proceed: <ul style="list-style-type: none"> • Confirm the match and deny entry. • Indicate no match and allow entry. • Cancel the check in process to escalate the situation, as needed.
Enable alert when visitor name matches inactive Employee Name	If selected, this option is initiated when creating a new visitor record. If the name matches the First Name and Last Name of an inactive employee, an alert message is displayed to indicate that this may be a former employee. This is an alert only, no action is automatically processed.
Default Value for Country	Sets the default country name that is displayed on the Contact tab of the Employee form.
Default Value for Department	Sets the default department name that is displayed first in the list of Departments on the Contact tab of the Employee form. This field must match a defined department name. See <i>Chapter 5: Visitor, Employee, and Other Lists</i> .

4. The **Changes Saved** window is displayed to indicate that the application must be restarted for the options to take effect. Click **OK**.
5. On the Main window click **Close** to restart the application.

6.3.3 Visitor Settings

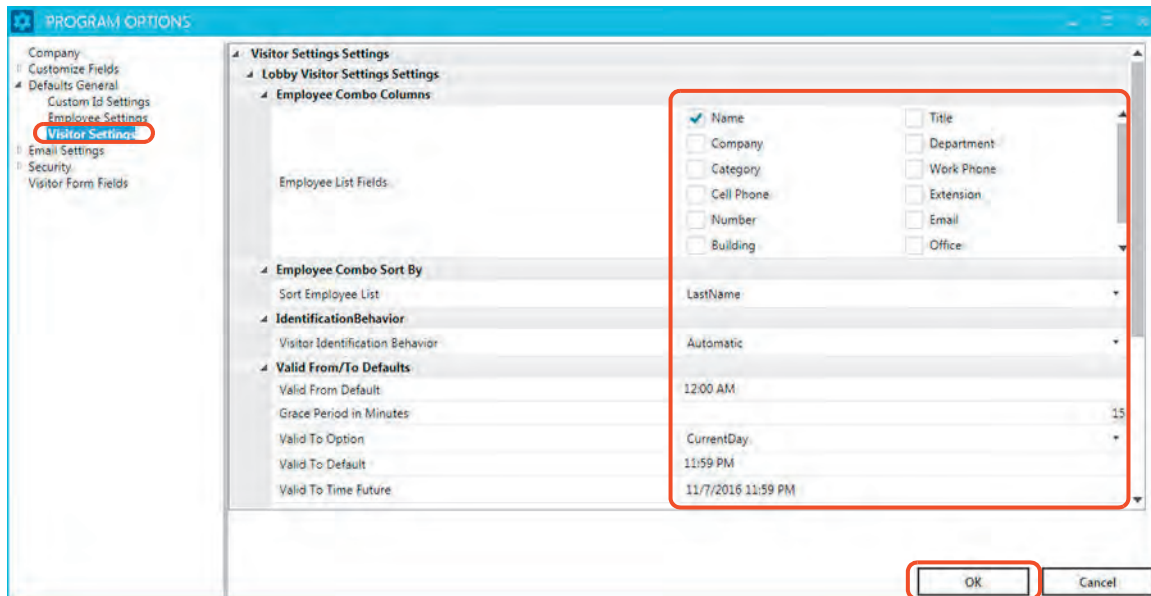
1. On the **PROGRAM OPTIONS** window, open the **Defaults General** menu.



2. Select **Visitor Settings**.



3. Make your updates to the fields and click **OK**.



Field	Description
Employee Combo Columns	
Employee List Fields	Defines the selections available in the drop-down list for the Employee field on the Visitor form.
Employee Combo Sort By	
Sort Employee List	<p>Defines the sort order of the selections in the drop-down list for the Employee field on the Visitor form.</p> <ul style="list-style-type: none"> • LastName • Company • Category • Department <p>This field must match a defined LastName, Company, Category, or Department name. See <i>Chapter 5: Visitor, Employee, and Other Lists</i>.</p>
Identification Behavior	
Visitor Identification Behavior	<p>This field sets the action when an existing visitor record matches a scanned barcode or a Custom ID.</p> <ul style="list-style-type: none"> • Automatic: When the required data on the record is completed, the visitor is automatically checked in. If the scanning device is being used for check out (barcode only) a matching record is located and the visitor is checked out automatically. • Prompt: When the required data on the record is completed, the user is prompted to check in the visitor. If the scanning device is being used for check out (barcode only) a matching record is located and the user is prompted to check out the visitor. • Manual: The user can choose to check in or check out the visitor.

Field	Description
Valid From/To Defaults	
Valid From Default	The daily start time for when visitors are expected or allowed to be on site. This is set to 12 midnight by default.
Grace Period in Minutes	The amount of time (in minutes) before the Valid From time and after the Valid To time that a visitor is allowed to check in or out without triggering an alert.
Valid To Option	<p>This field defines the period of time that a visitor is expected or allowed to be on site.</p> <ul style="list-style-type: none"> • CurrentDay: When selected, the Valid To Default must also be selected. This is the time visitors are expected to have vacated the site with very few exceptions. The system default is set to 11:59 pm. • FutureDay: When selected, the Valid To Days Future must also be selected. This is the number of days in the future that visitors are allowed to enter and exit the site. • HoursInFuture: When selected, the Valid Hours Future must also be selected. This is the number of hours in the future that visitors are allowed to enter and exit the site. • DateInFuture: When selected, the Valid To Date Future must also be selected. This is the date when all visitors are expected to have vacated the site.
Valid To Default	This is the time visitors are expected to have vacated the site with few exceptions. The system default is 11:59 PM.
Valid To Time Future	This is the time in the future that visitors are allowed to enter and exit the site. The system default is the current date at 11:59PM.
Valid To Days Future	This is the number of days in the future that visitors are allowed to enter and exit the site.
Valid Hours Future	This is the number of hours in the future that visitors are allowed to enter and exit the site. The system default is 24.
Valid To Date Future	This is the date when all visitors are expected to have vacated the site. The system default is 12/31/2013 11:59 PM.
Restrict Entry Period	When selected, no one can check in or check out during the specified valid times.
Returning Visitor Defaults	
Copy Signature	When selected, the visitor signature is saved and is duplicated on the Entry tab of the Visitor form.
Copy Employee	When selected, the employee host name is saved and is duplicated on the Entry tab of the Visitor form.
Copy Reason	When selected, the visit reason is saved and is duplicated on the Entry tab of the Visitor form.
Copy Clearance	When selected, the clearance setting is saved and is duplicated on the Entry tab of the Visitor form.

Field	Description
Copy User Defined Fields	When selected, the user defined fields are saved and are duplicated on the Entry tab of the Visitor form.
Copy SSN	When selected, the SSN (social security number) is saved and is duplicated on the Entry tab of the Visitor form.

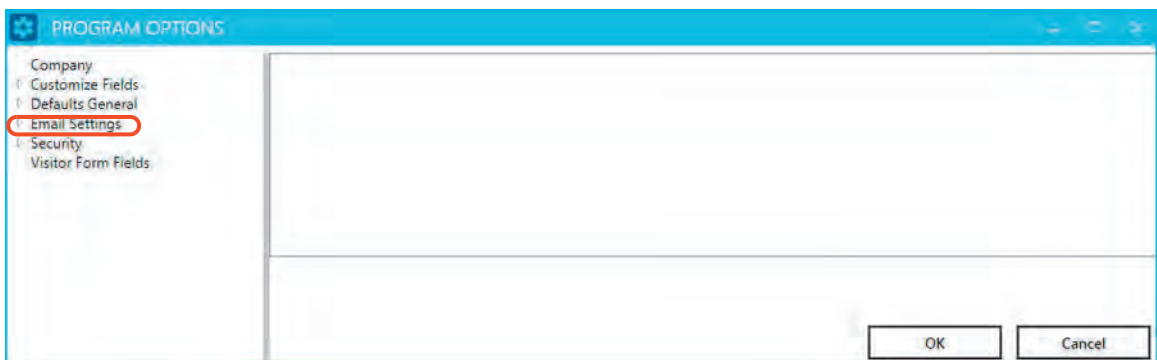
4. The **Changes Saved** window is displayed to indicate that the application must be restarted for the options to take effect. Click **OK**.
5. On the Main window click **Close** to restart the application.

6.4 Update Email Settings

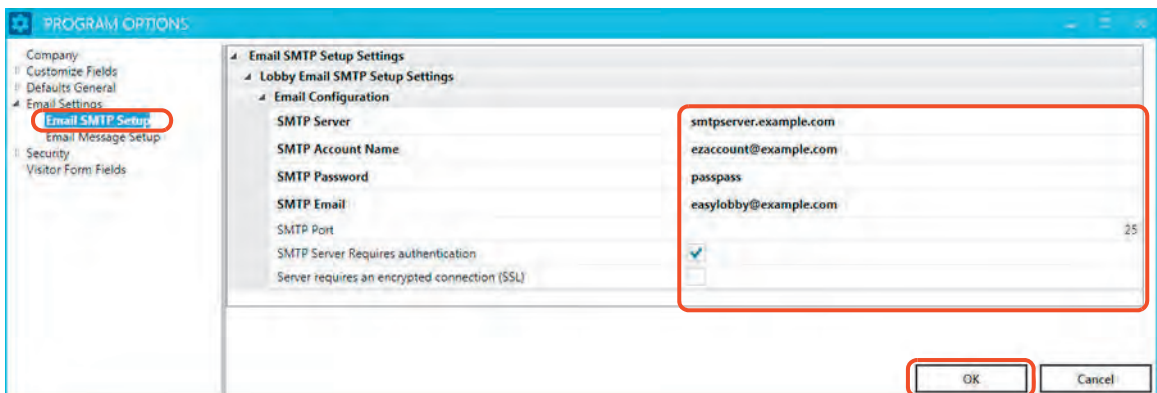
These settings configure the SMTP server used to send email messages in EasyLobby Solo. An administrator can set up email notifications to be sent to an employee or host when a visitor checks in. Email alert messages can be set up to specify a subject line, message content, and the recipients. For example, support staff can be notified if the check-in location needs assistance or security staff can be notified if a person from a watch list has checked in.

6.4.1 Email SMTP Setup

1. On the **PROGRAM OPTIONS** window, open the **Email Settings** menu.



2. Select **Email SMTP Setup**.
3. Make your updates to the fields and click **OK**.

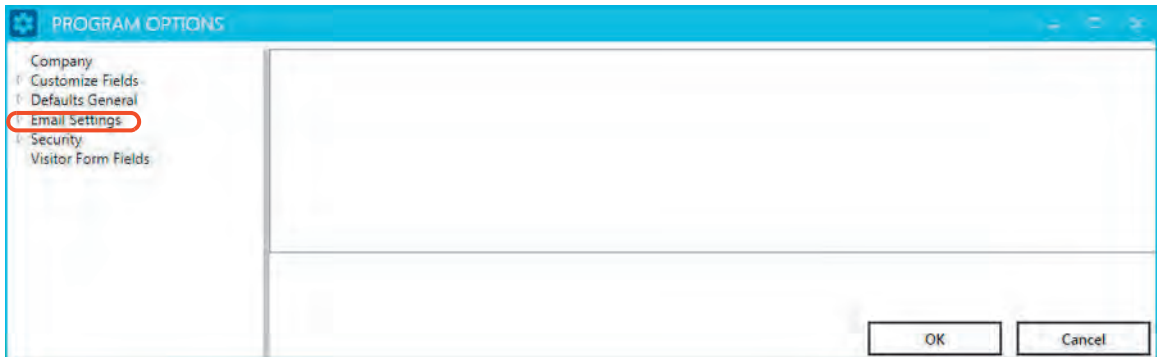


Field	Description
Email Configuration	
SMTP Server	Name or IP address of the SMTP server. Email is sent through this server. Default example format: smtpserver.example.com
SMTP Account Name	The account name for the SMTP server account. Default example format: ezaccount@example.com
SMTP Password	The password for the SMTP server account. Default example format: passpass
SMTP Email	The SMTP email address. Default example format: easylobby@example.com
SMTP Port	The port number for the SMTP server. Standard SMTP port is 25.
SMTP Server Requires authentication	If selected, the server requires authentication. The Account Name and Password fields must be entered.
Server requires an encrypted connection (SSL)	If selected, the SMTP server connection requires SSL (secure socket layer).

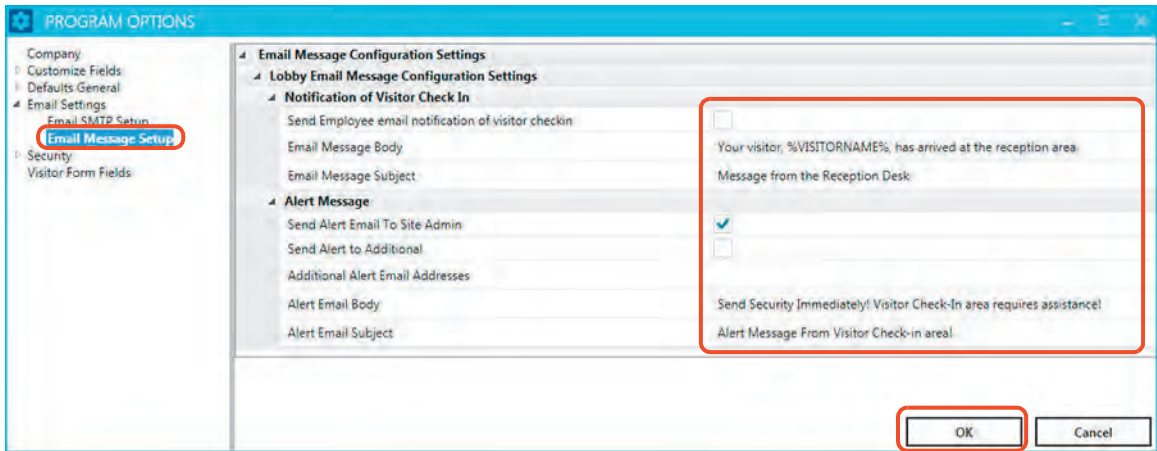
4. The **Changes Saved** window is displayed to indicate that the application must be restarted for the options to take effect. Click **OK**.
5. On the Main window click **Close** to restart the application.

6.4.2 Email Message Setup

1. On the **PROGRAM OPTIONS** window, open the **Email Settings** menu.



2. Select **Email Message Setup**.
3. Make your updates to the fields and click **OK**.



Field	Description
Notification of Visitor Check In	
Send Employee email notification of visitor checkin	If selected, the employee specified on the Visitor form is sent a notification when the visitor has checked in.
Email Message Body	The text of the email sent to the employee specified on the Visitor form. Default example text: Your visitor, %VISITORNAME%, has arrived at the reception area.
Email Message Subject	The subject of the email sent to the Employee specified on the Visitor form. Default example text: Message from the Reception Desk.
Alert Message	
Send Alert Email to Site Admin	If selected, an email alert is sent to the site administrator email setting specified at installation. This setting can be updated by navigating to the Help > ABOUT >About window.
Send Alert to Additional	If selected, email alerts are sent to additional email addresses specified in the Additional Alert Email Addresses .
Additional Alert Email Addresses	Specify any additional email addresses to receive alert messages. Each email address must be separated by a semicolon (;).
Alert Email Body	The text of the email sent to all specified email addresses. Default example text: Send Security Immediately! Visitor Check-In area requires assistance!
Alert Email Subject	The subject of the email sent to sent to all specified email addresses. Default example text: Alert Message From Visitor Check-in area!

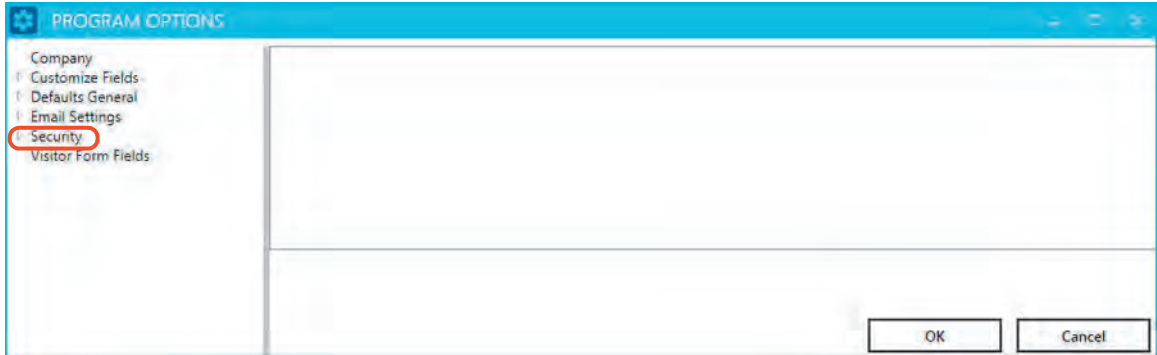
4. The **Changes Saved** window is displayed to indicate that the application must be restarted for the options to take effect. Click **OK**.
5. On the Main window click **Close** to restart the application.

6.5 Customize Security Options

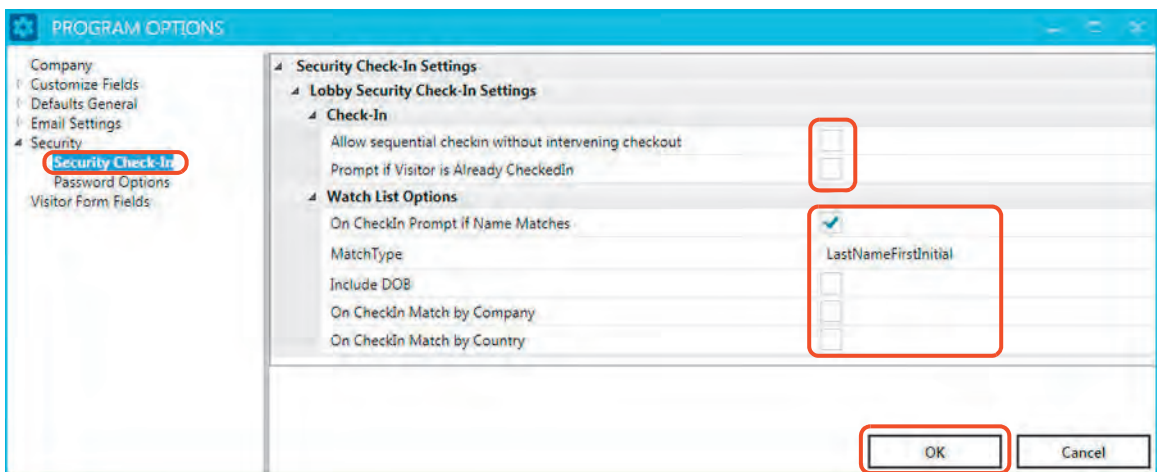
EasyLobby security behavior is determined by the setting up barcode scanners, IDs, watch lists, and password generators. Government issued licenses and passports can be configured to trigger actions such as lookup, check in, and check out.

6.5.1 Security Check In

1. On the **PROGRAM OPTIONS** window, open the **Security** menu.



2. Select **Security Check-In**.
3. Make your updates to the fields and click **OK**.



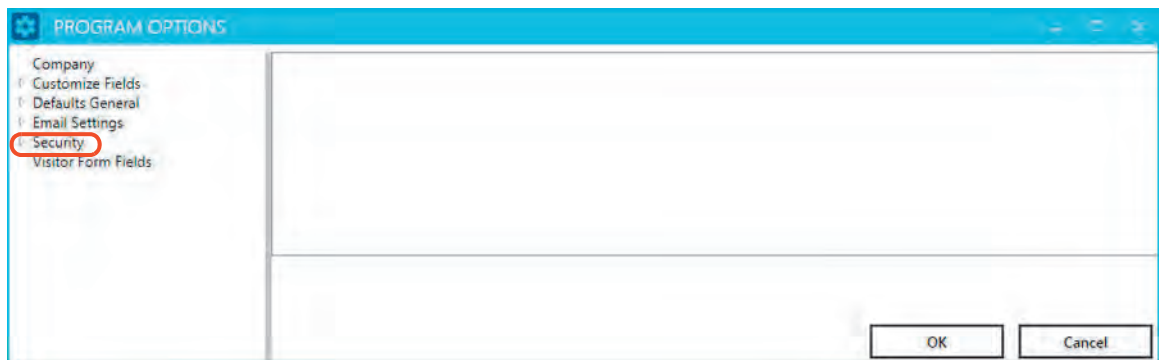
Field	Description
Check-In	
Allow sequential checkin without intervening checkout	If selected, visitors are allowed to enter and exit the site multiple times without requiring a formal check out.
Prompt if Visitor is Already CheckedIn	If selected, a visitor that has checked in without a corresponding check out returns to check in, the user is notified that the visitor is already checked in.

Field	Description
Watch List Options	
On CheckIn Prompt if Name Matches	When a visitor checks in and their name matches any name on the watch list, a message is displayed to alert the user. This option is selected by default.
MatchType	Specifies how the watch list is queried for matches. Options are: <ul style="list-style-type: none"> • Last Name Only • Last Name First Initial (of First Name). This option is the default. • Last Name First Name • No Matching
Include DOB	Allows the visitor date of birth to be matched to the watch list. This setting is null.
On CheckIn Match by Company	When selected, the company name of the visitor checking in is matched to the watch list.
On CheckIn Match by Country	When selected, the Country Name of the visitor checking in is matched to the watch list.

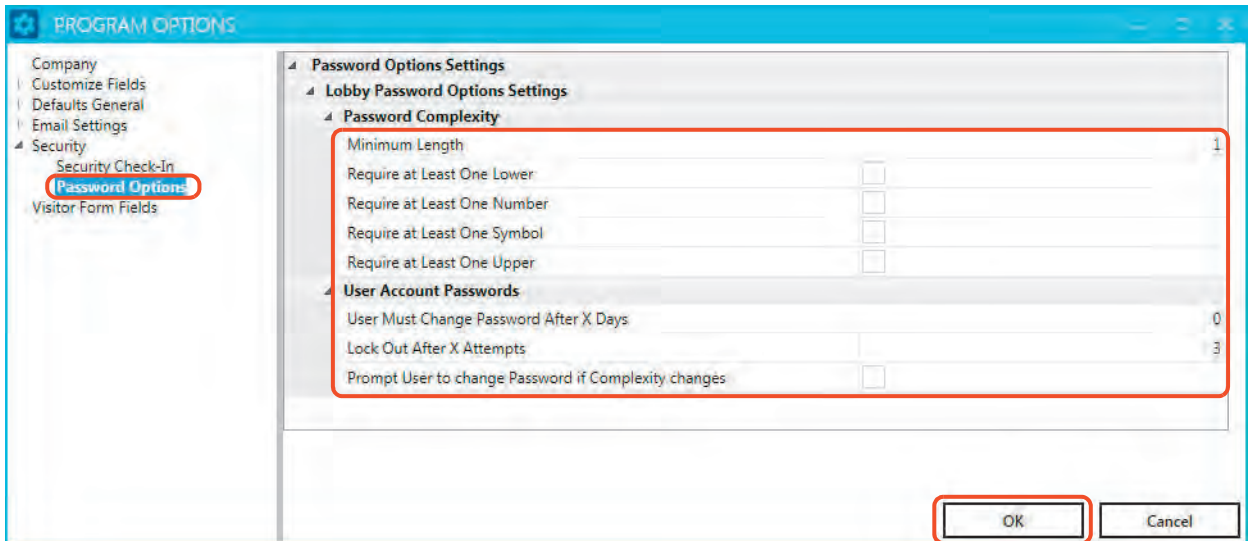
4. The **Changes Saved** window is displayed to indicate that the application must be restarted for the options to take effect. Click **OK**.
5. On the Main window click **Close** to restart the application.

6.5.2 Password Options

1. On the **PROGRAM OPTIONS** window, open the **Security** menu.



2. Select **Password Options**.
3. Make your updates to the fields and click **OK**.



Field	Description
Password Complexity	
Minimum Length	Defines the minimum password length. This field must be a minimum of 1 character and a maximum of 10 characters. The password cannot be blank.
Require at Least One Lower	Defines that one of the password characters must be a lowercase letter.
Require at Least One Number	Defines that one of the password characters must be a number.
Require at Least One Symbol	Defines that one of the password characters must be a symbol.
Require at Least One Upper	Defines that one of the password characters must be an uppercase letter.
User Account Passwords	
User Must Change Password After X Days	Sets the number of days until the user is prompted to change their password.
Lock Out After X Attempts	Sets the number of log in attempts a user can make until they are locked out of the system.
Prompt User to change Password if Complexity changes	If selected, a user is prompted when an administrator changes the password complexity.

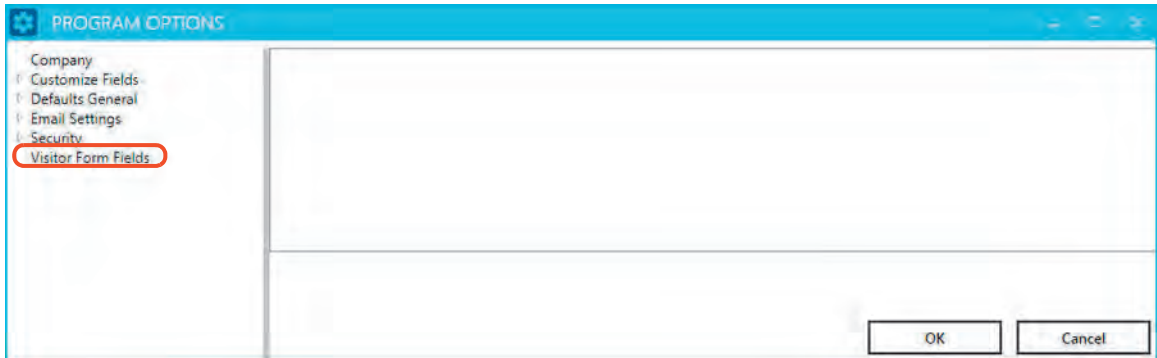
4. The **Changes Saved** window is displayed to indicate that the application must be restarted for the options to take effect. Click **OK**.
5. On the Main window click **Close** to restart the application.

6.6 Customize Visitor Form Fields

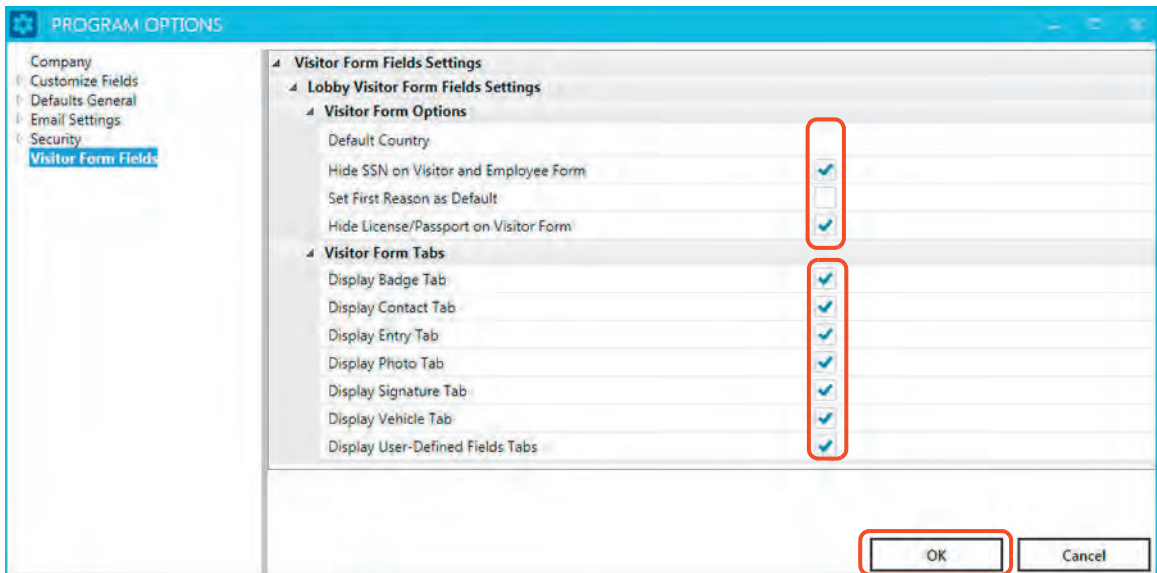
The Visitor form can collect extensive information about the visitors to the site. Some of this information may not be useful or appropriate for the site.

Use the following steps to customize the fields and the tabs that are displayed on the Visitor form.

1. On the **PROGRAM OPTIONS** window, click **Visitor Form Fields**.



2. Make your updates to the fields and click **OK**.



Field	Description
Visitor Form Options	
Default Country	Specifies a country name that can be pre-populated into all new Visitor forms.
Hide SSN on Visitor and Employee Form	Specifies that any scanned ID that contains a social security number is automatically masked and does not appear on a Visitor or Employee form. This option is selected by default.
Set First Reason as Default	Specifies that the first reason listed in the Reasons list is the default value for all new visitors.

Field	Description
Hide License/Passport on Visitor Form	Specifies that any scanned license or passport numbers are automatically masked and do not appear on a Visitor form. This option is selected by default.
Visitor Form Tabs	
Display Badge Tab	Display the Badge tab on the Visitor form.
Display Contact Tab	Display the Contact tab on the Visitor form.
Display Entry Tab	Display the Entry tab on the Visitor form.
Display Photo Tab	Display the Photo tab on the Visitor form.
Display Signature Tab	Display the Signature tab on the Visitor form.
Display Vehicle Tab	Display the Vehicle tab on the Visitor form.
Display User-defined Fields Tabs	Display the UDF tab on the Visitor form.

3. The **Changes Saved** window is displayed to indicate that the application must be restarted for the options to take effect. Click **OK**.
4. On the Main window click **Close** to restart the application.

Chapter 7

Badge Options

Badge options specify a template and printer definition for visitor badges. Any of the following badge options can be chosen:

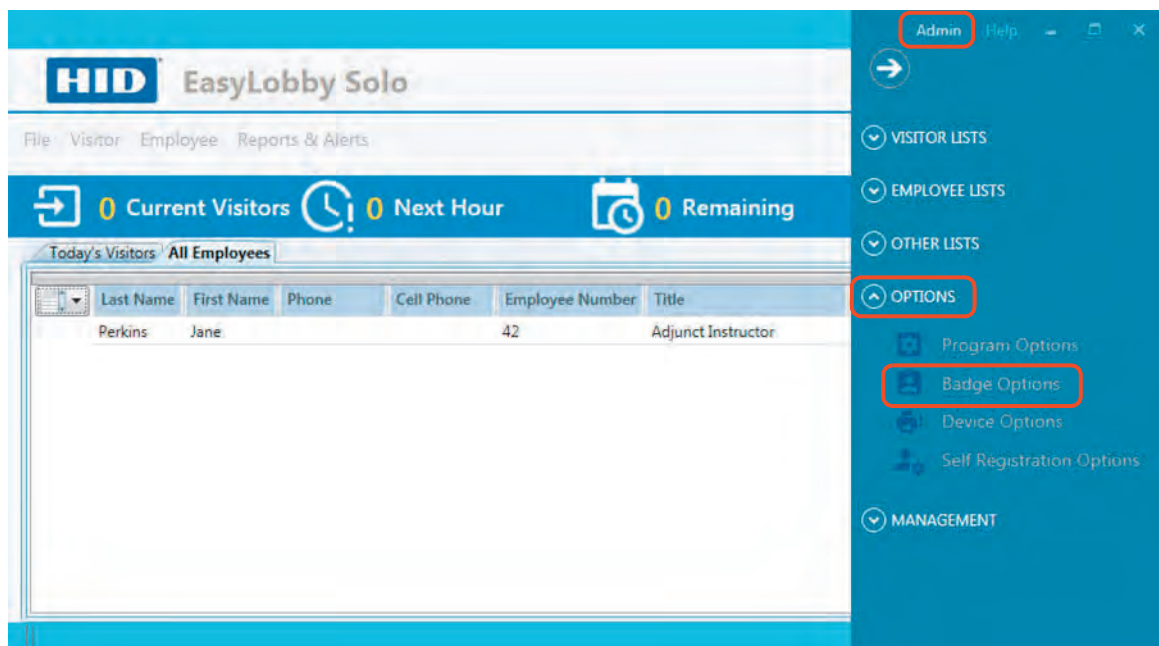
- Do nothing and use the out-of-the box factory default for all visitor categories.
- Create a specification for a system default, which are used for all visitor categories.
- Create a specification for any or all visitor categories.

Note: Defining a visitor category default overrides the factory or system default options.

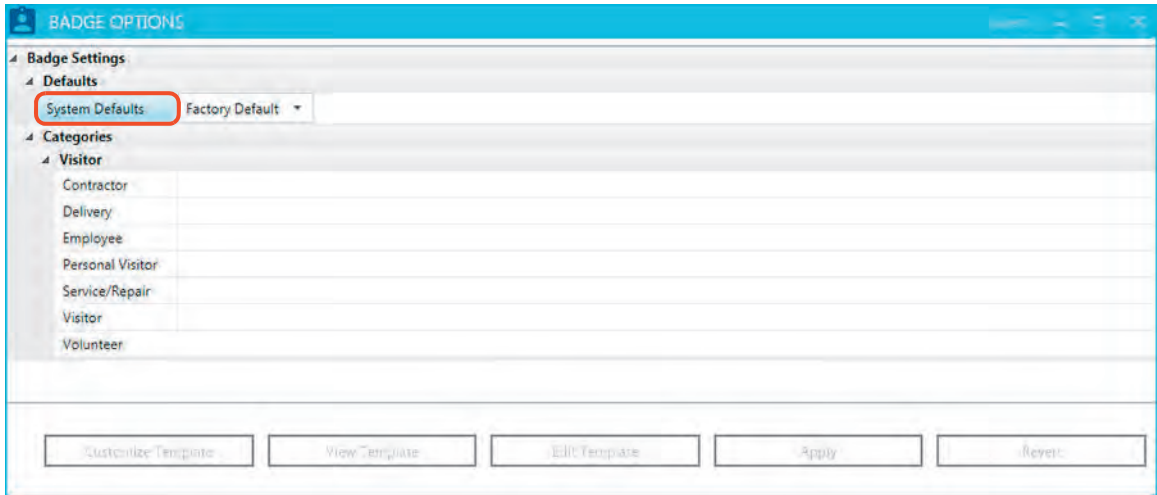
Badge variations allow you to visually differentiate between types of visitor categories. For example, badges for temporary workers may use a portrait orientation while contract and service visitors use a landscape orientation with a color designation.

7.1 Configure the System Default Badge Settings

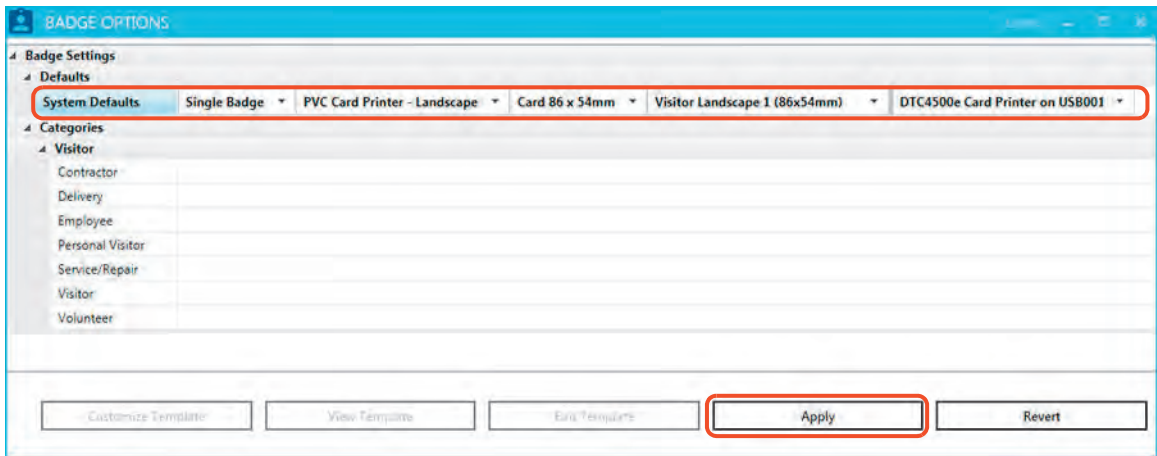
1. Select **Admin > OPTIONS > Badge Options**.



2. On the **BADGE OPTIONS** window, select **System Defaults**.

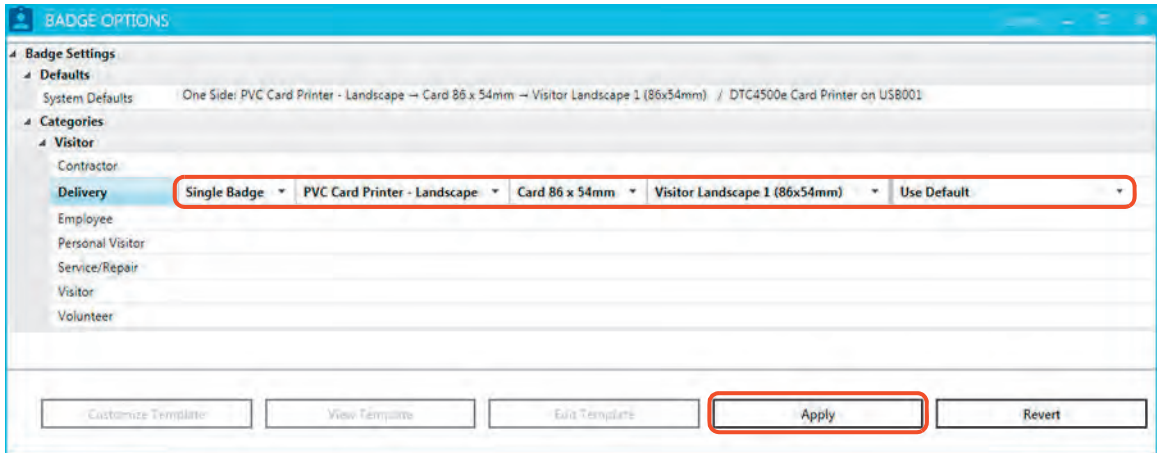


3. Make your badge selections for each option available at the site.
4. Click **Apply**.



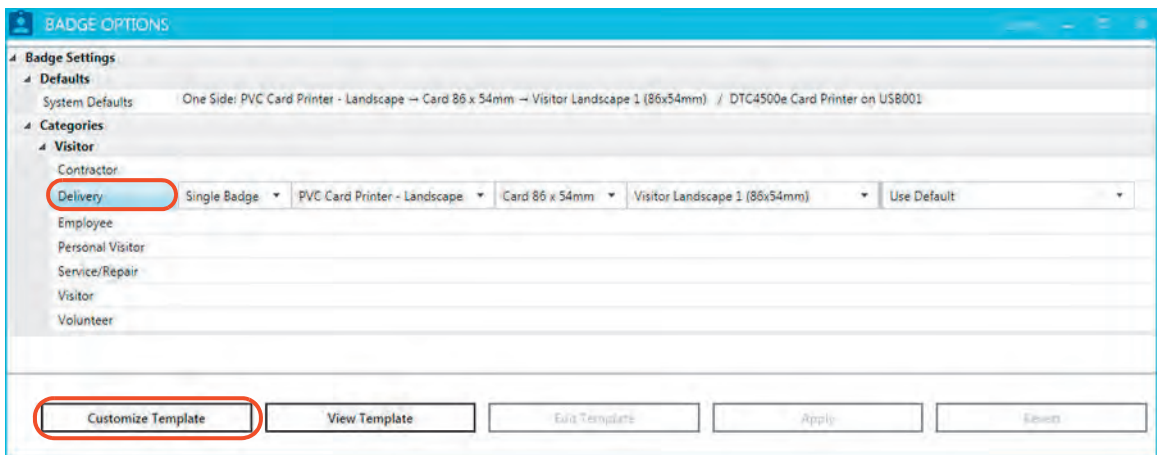
7.2 Create a Custom Badge

1. Select **Admin > OPTIONS > Badge Options**.
2. Select the visitor category to create the badge. The current settings of this type are displayed.
3. Select the badge options from the drop-down lists.
4. Click **Apply**.

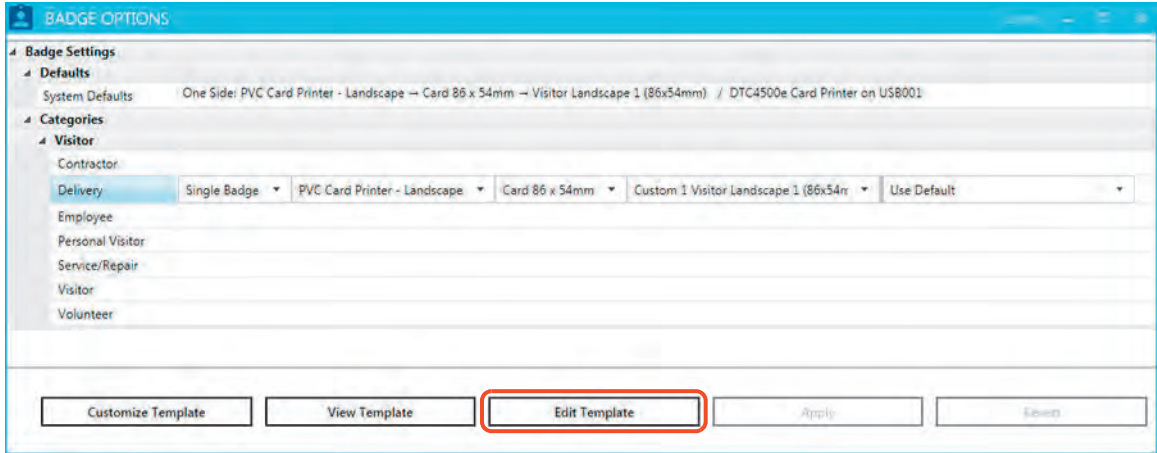


The **BADGE OPTIONS** window is refreshed.

5. Select a Badge type and click **Customize Template**.
Note: This selection makes a copy of the badge template. The **BADGE OPTIONS** window is refreshed.

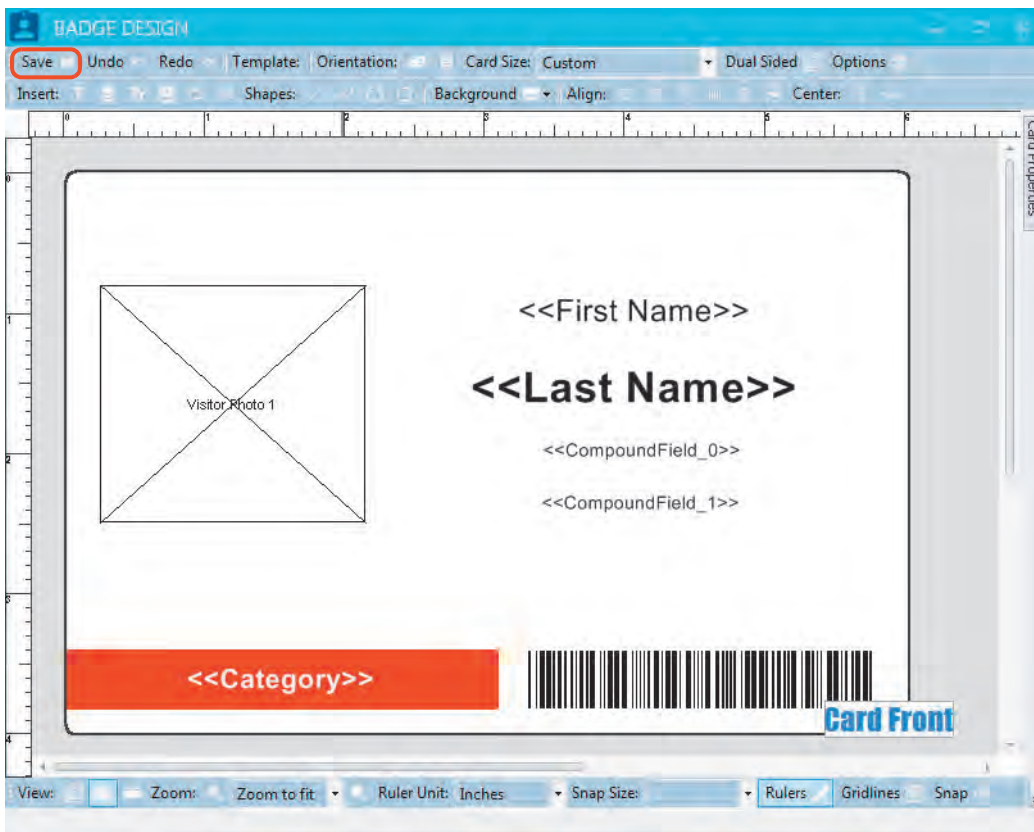


6. Click **Edit Template**.

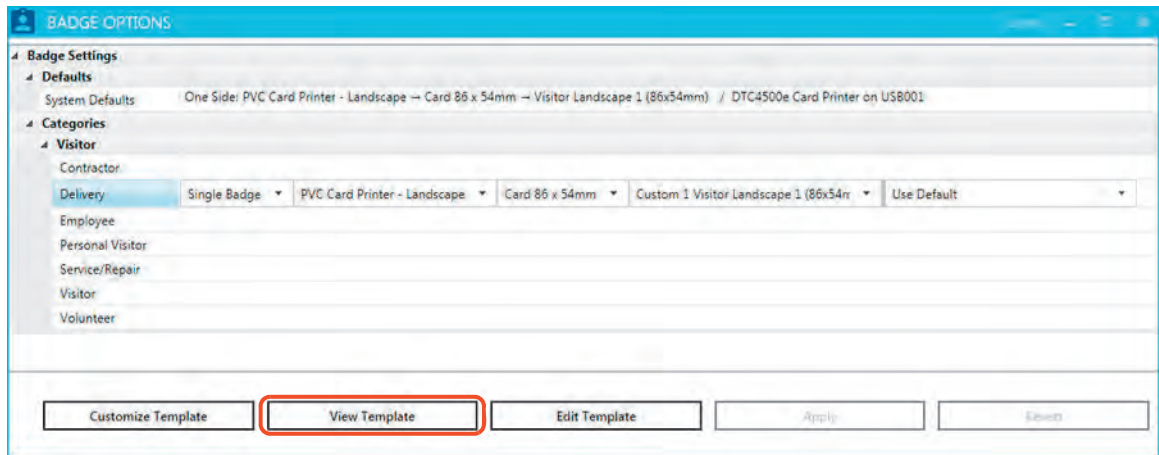


7. Modify the layout of the badge as needed and click **Save**.

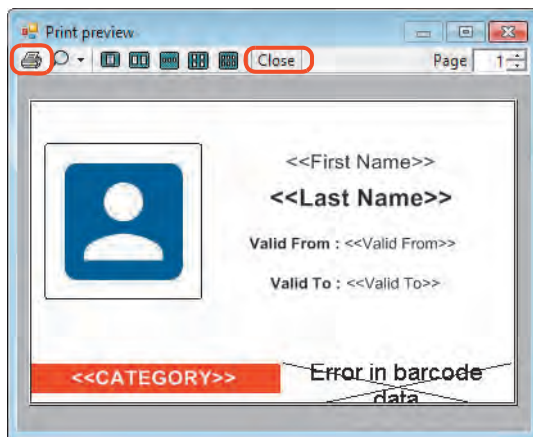
For information on badge design and customizing a badge, see *Section 7.3: Customize a Badge*.



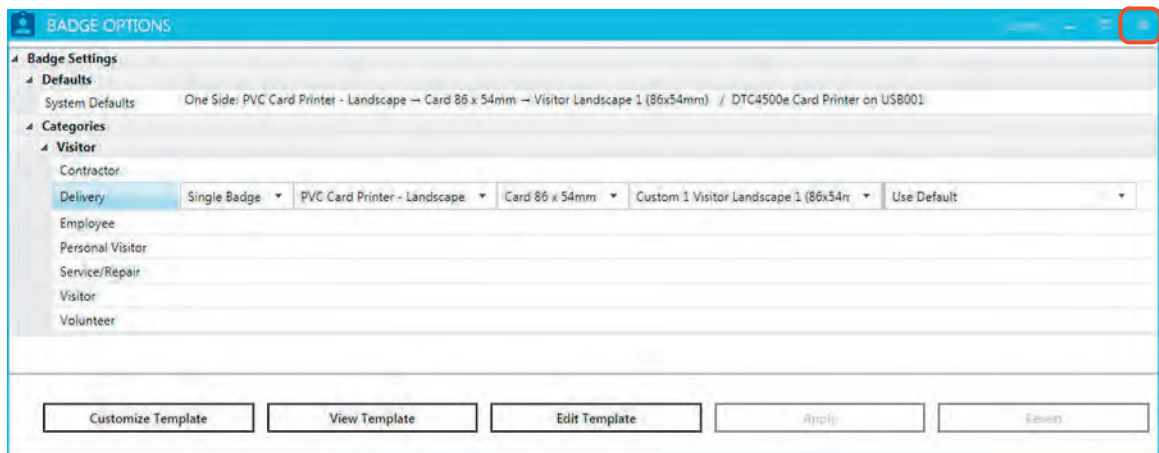
8. Select **View Template** to preview the badge layout.



9. On the **Print preview** window
- Select the **Printer** icon to print the sample badge.
 - Click **Close** to return to the **BADGE OPTIONS** window.



10. On the **BADGE OPTIONS** window, click **Close** to return to the Main window.



7.3 Customize a Badge

The Badge Design window is used to customize the layout of a card template. EasyLobby Solo includes predefined objects on the card templates to simplify the process of creating a custom badge. Badges can be customized by adding additional objects, modifying, or deleting the predefined objects, and saving the card layout as a custom template.

In the BADGE DESIGN window, the user can:

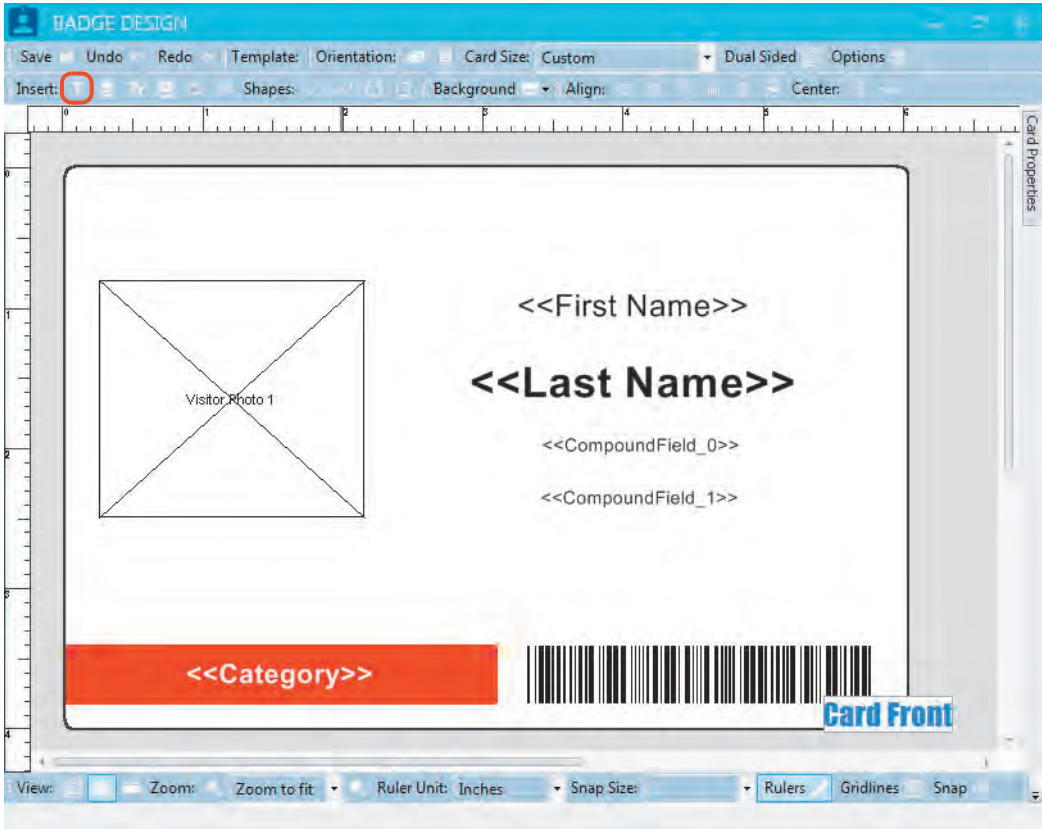
- Modify the card layout.
- Add or update text labels, data fields, compound fields, photos, an image from a file, a background, barcodes, and shapes.
- Personalize the design environment, including adding and removing grid lines and rulers as well as modifying the card view, orientation, zoom level, and properties.

Note: The objects displayed on the default card template can be modified by double-clicking the object and making changes in the corresponding properties window. Objects can be deleted by right-clicking the object and selecting Remove from the menu.

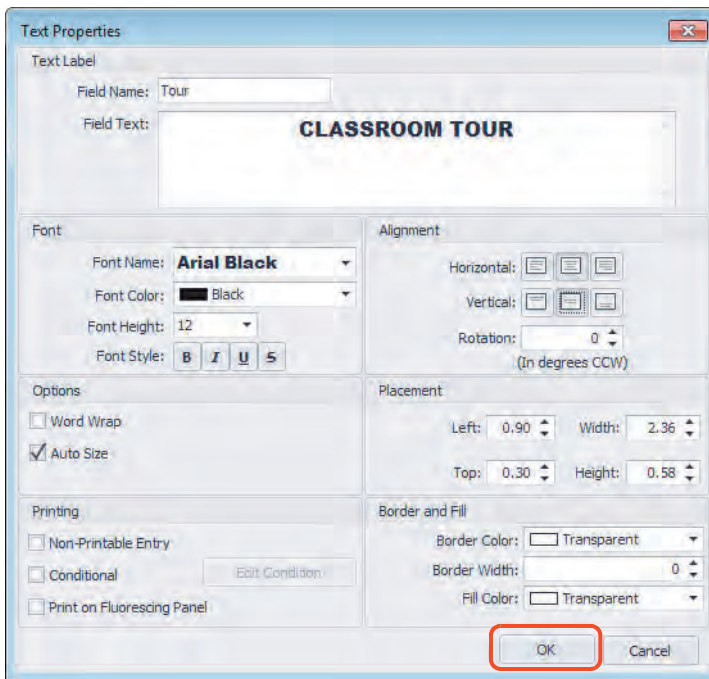
7.3.1 Add a Text Label

A text label prints the same on every card. For example, the words CLASSROOM TOUR or TEMPORARY can be added to each badge.

1. On the **BADGE DESIGN** window, select the **Text Label** icon.



- Click in the card display pane to open the **Text Properties** window. Make your updates to the fields and click **OK**.

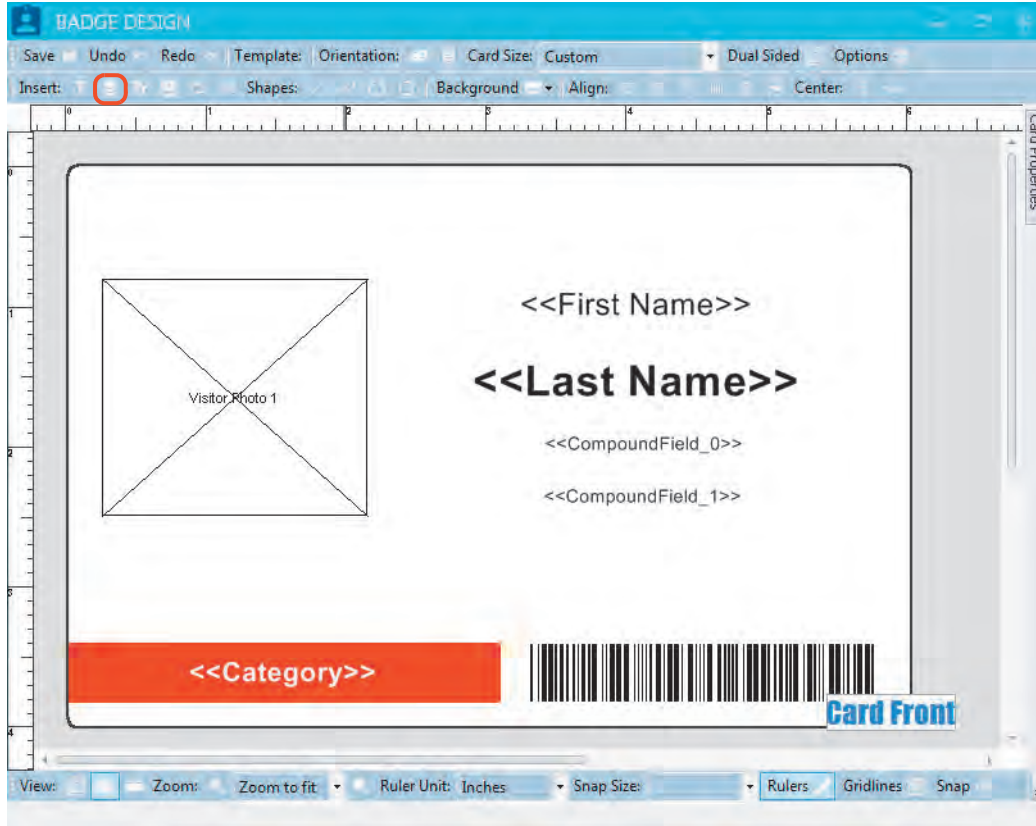


- On the **BADGE DESIGN** window, the text label is displayed on the card layout. The text label can be moved using drag and drop. When your updates are completed, click **Save**.

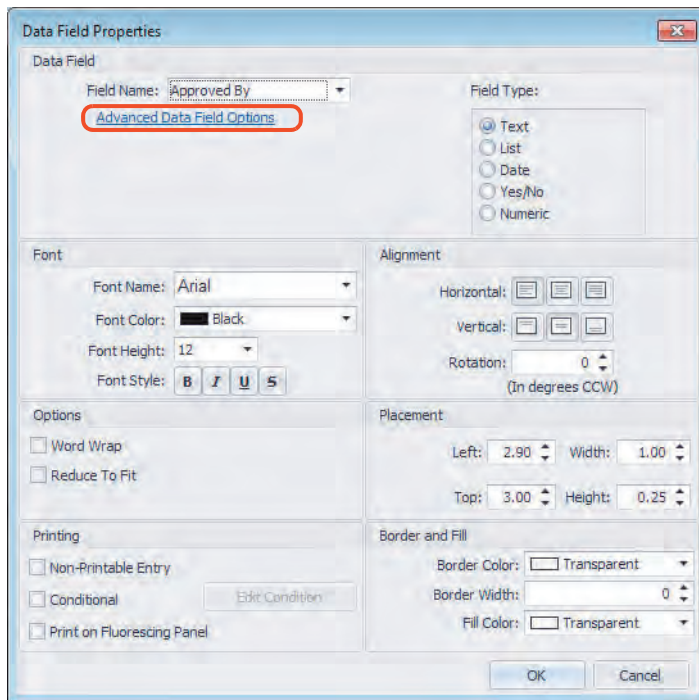
7.3.2 Add a Data Field

A data field adds unique information to the card record.

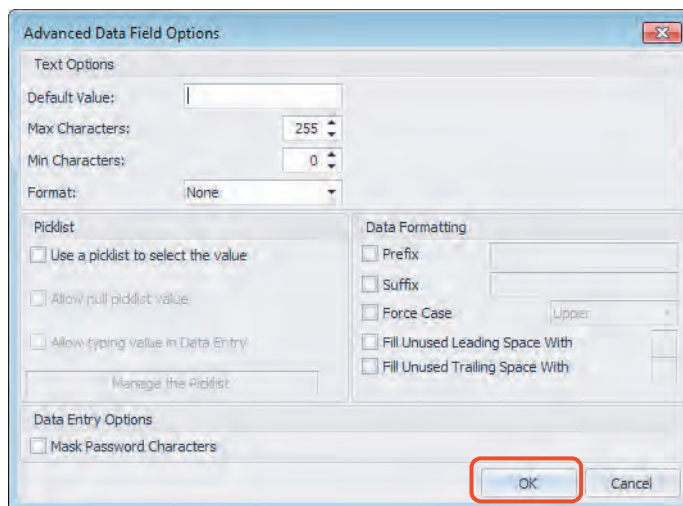
1. On the **BADGE DESIGN** window, select the **Data Field** icon.



- Click in the card display pane to open the **Data Field Properties** window. Make your updates to the fields.



- To update specific information according to the type of field selected (Text, List, Date, Yes/No, or Numeric) click **Advanced Data Field Options**.
- On the **Advanced Data Field Options** window, make your updates to the fields and click **OK**.

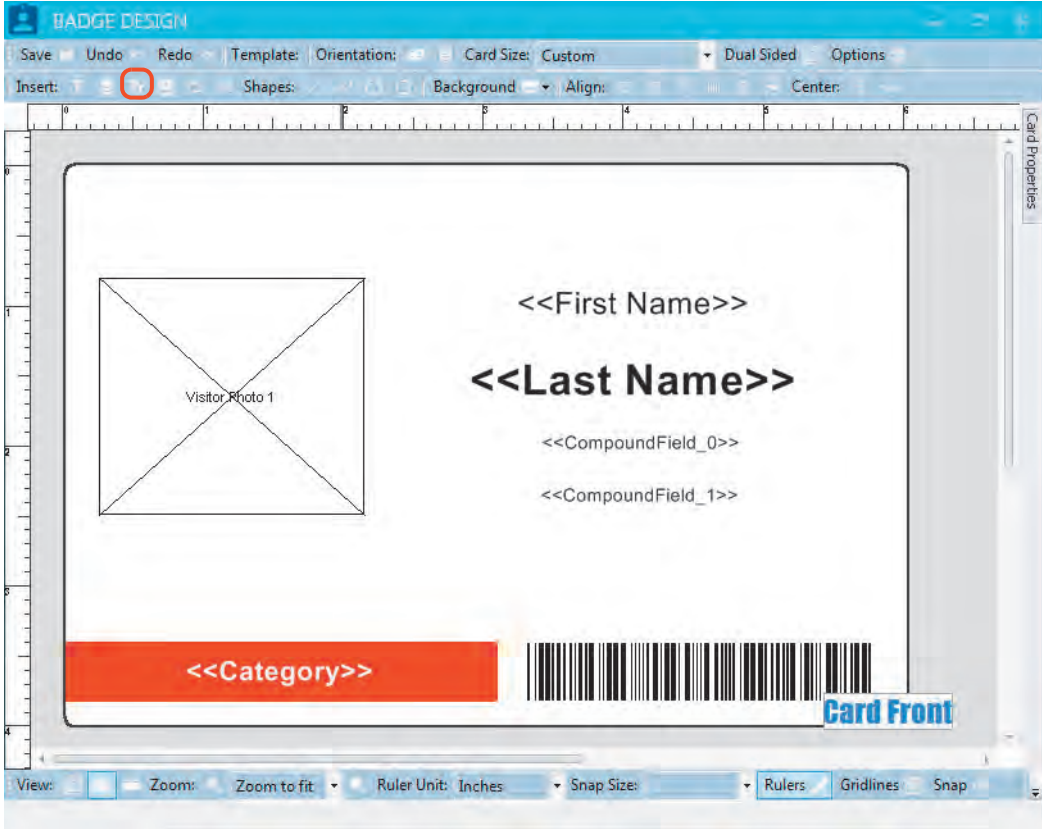


- On the **Data Field Properties** window, click **OK**.
- On the **BADGE DESIGN** window, the data field is displayed on the card layout. The data field can be moved using drag and drop. When your updates are completed, click **Save**.

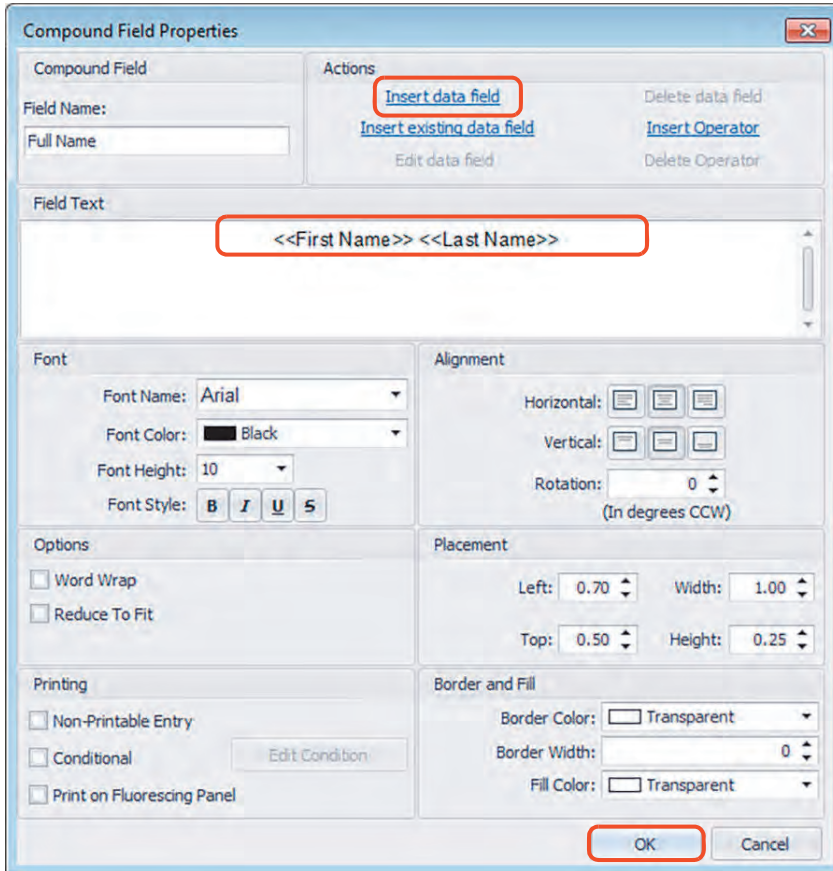
7.3.3 Add a Compound Field

A compound field is useful when multiple data fields are to be aligned next to each other. For example, placing a last name one space after the first name.

1. On the **BADGE DESIGN** window, select the **Compound Field** icon.



2. Click in the card display pane to open the **Compound Field Properties** window.
3. Make your updates to the fields.
 - a. Define the fields to be compounded, using the **Actions** pane.
 - b. When the field selections are displayed and formatted in the **Field Text** edit box, click **OK**.



The screenshot shows the 'Compound Field Properties' dialog box with the following sections and controls:

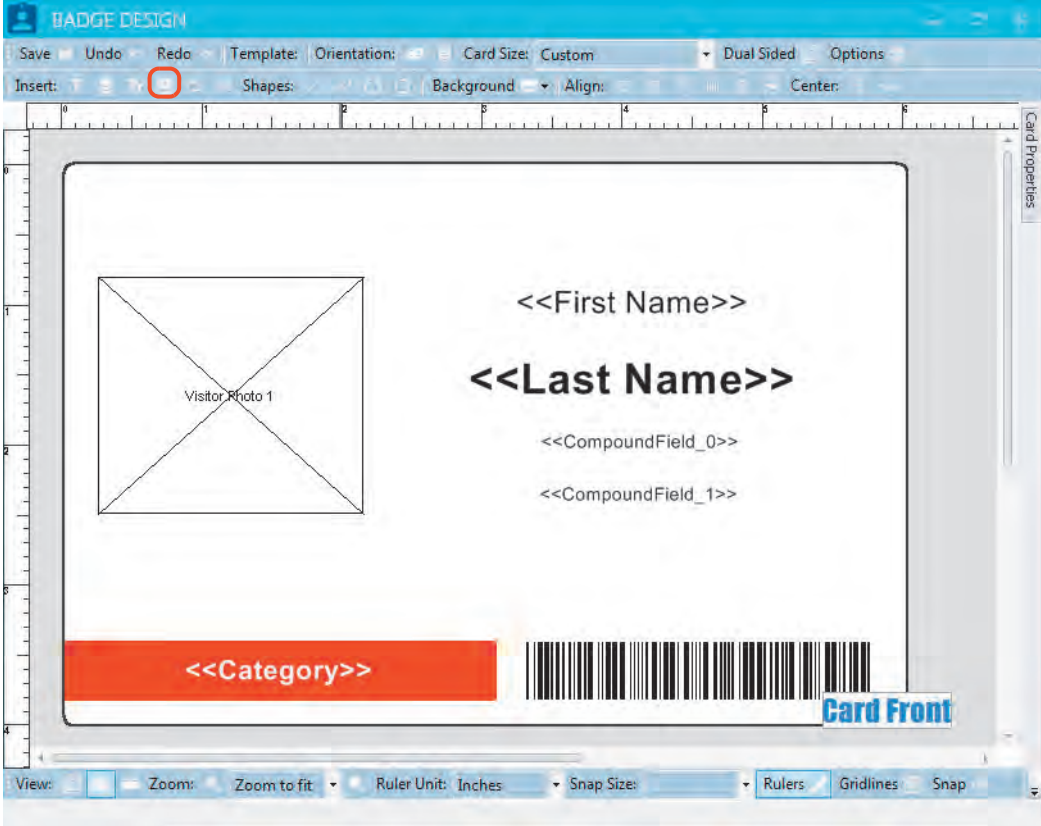
- Compound Field:** Field Name: Full Name
- Actions:**
 - Insert data field (highlighted with a red box)
 - Insert existing data field
 - Edit data field
 - Delete data field
 - Insert Operator
 - Delete Operator
- Field Text:** <<First Name>> <<Last Name>> (highlighted with a red box)
- Font:**
 - Font Name: Arial
 - Font Color: Black
 - Font Height: 10
 - Font Style: B, I, U, S
- Alignment:**
 - Horizontal: Left, Center, Right
 - Vertical: Top, Middle, Bottom
 - Rotation: 0 (In degrees CCW)
- Options:**
 - Word Wrap (unchecked)
 - Reduce To Fit (unchecked)
- Placement:**
 - Left: 0.70
 - Width: 1.00
 - Top: 0.50
 - Height: 0.25
- Printing:**
 - Non-Printable Entry (unchecked)
 - Conditional (unchecked) - Edit Condition
 - Print on Fluorescing Panel (unchecked)
- Border and Fill:**
 - Border Color: Transparent
 - Border Width: 0
 - Fill Color: Transparent
- Buttons:** OK (highlighted with a red box), Cancel

4. On the **BADGE DESIGN** window, the compound data field can be moved using drag and drop. When your updates are completed, click **Save**.

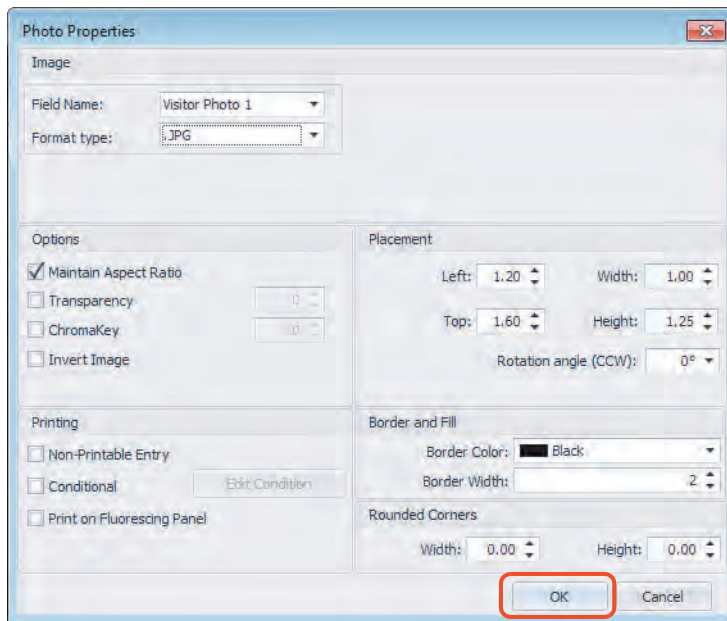
7.3.4 Add a Photo

A photo can be added for visual identification.

1. On the **BADGE DESIGN** window, select the **Photo** icon.



- Click in the card display pane to open the **Photo Properties** window. Make your updates to the fields and click **OK**.

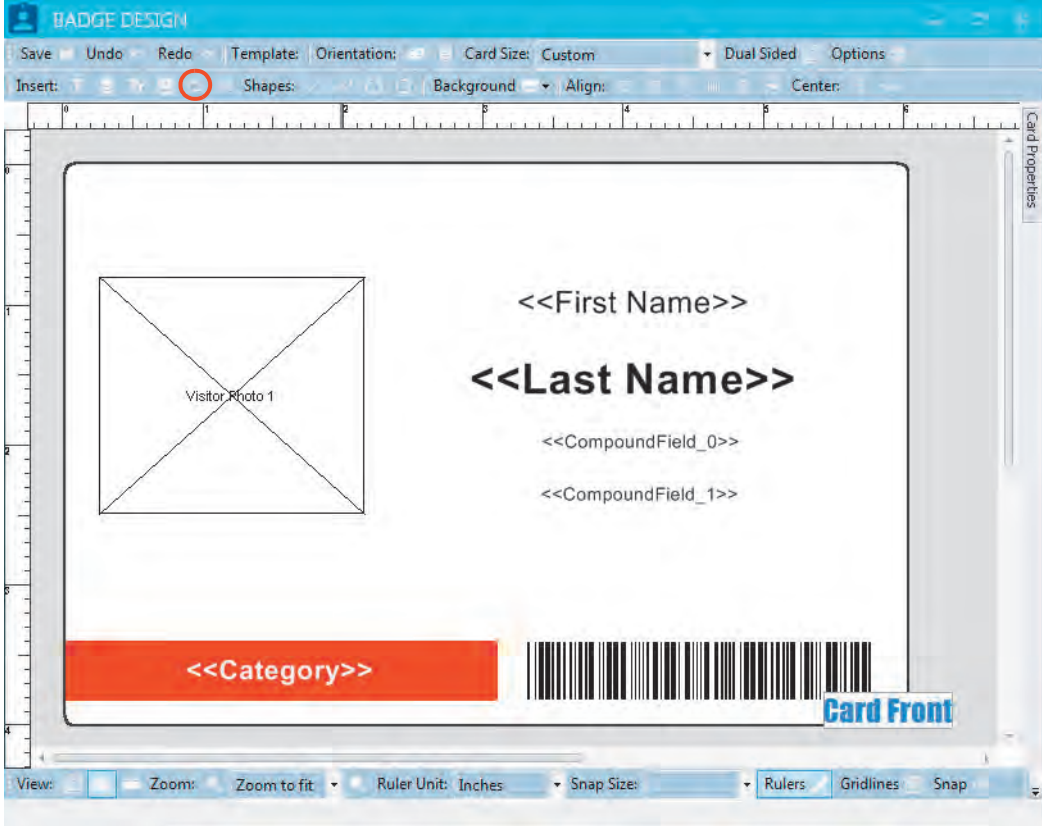


- On the **BADGE DESIGN** window, the photo field is displayed on the card layout. The photo field can be moved using drag and drop. When your updates are completed, click **Save**.

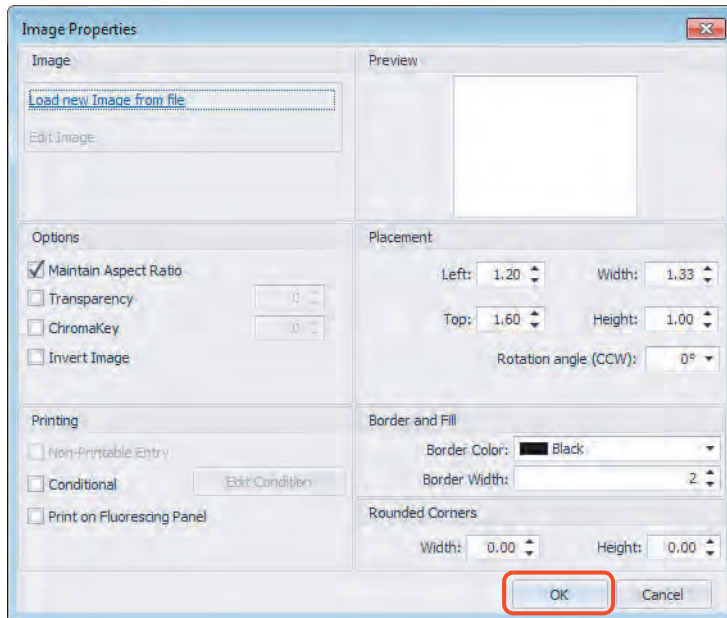
7.3.5 Add an Image

An image, such as a logo, can be displayed on every card.

1. On the **BADGE DESIGN** window, select the **Image from File** icon.



2. Click in the card display pane to open the **Image Properties** window. Make your updates to the fields and click **OK**.



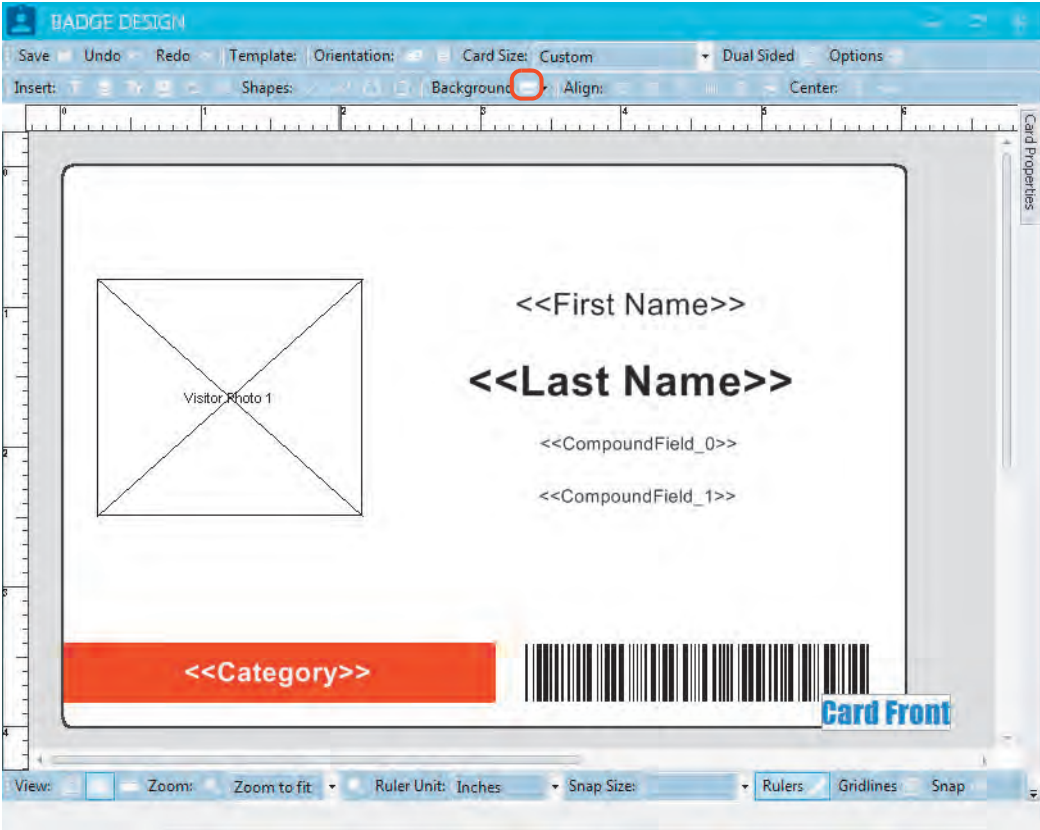
3. On the **BADGE DESIGN** window, the image field is displayed on the card layout. The image field can be moved using drag and drop. When your updates are complete, click **Save**.

7.3.6 Add a Background

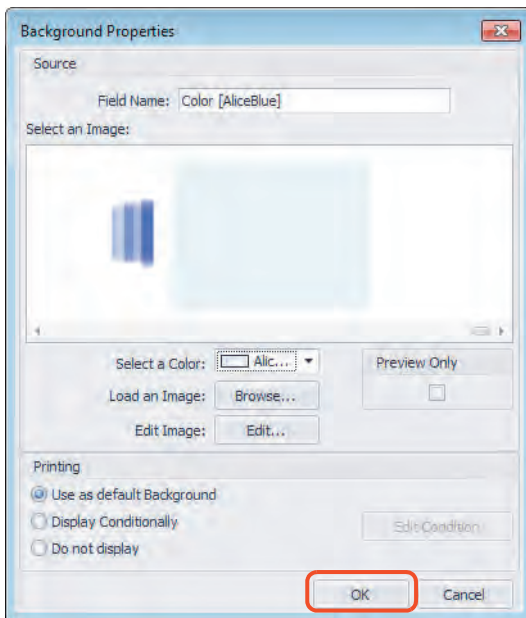
A background displays on every card. This can be a solid color, one of the provided sample backgrounds, or your own background.

1. On the **BADGE DESIGN** window, select the **Background** icon.

Note: If the card is dual-sided, the user can select which side to apply the background. The user can also right-click on the card and select **Add Background**.



2. Click in the card display pane to open the **Background Properties** window. Make your updates to the fields and click **OK**.

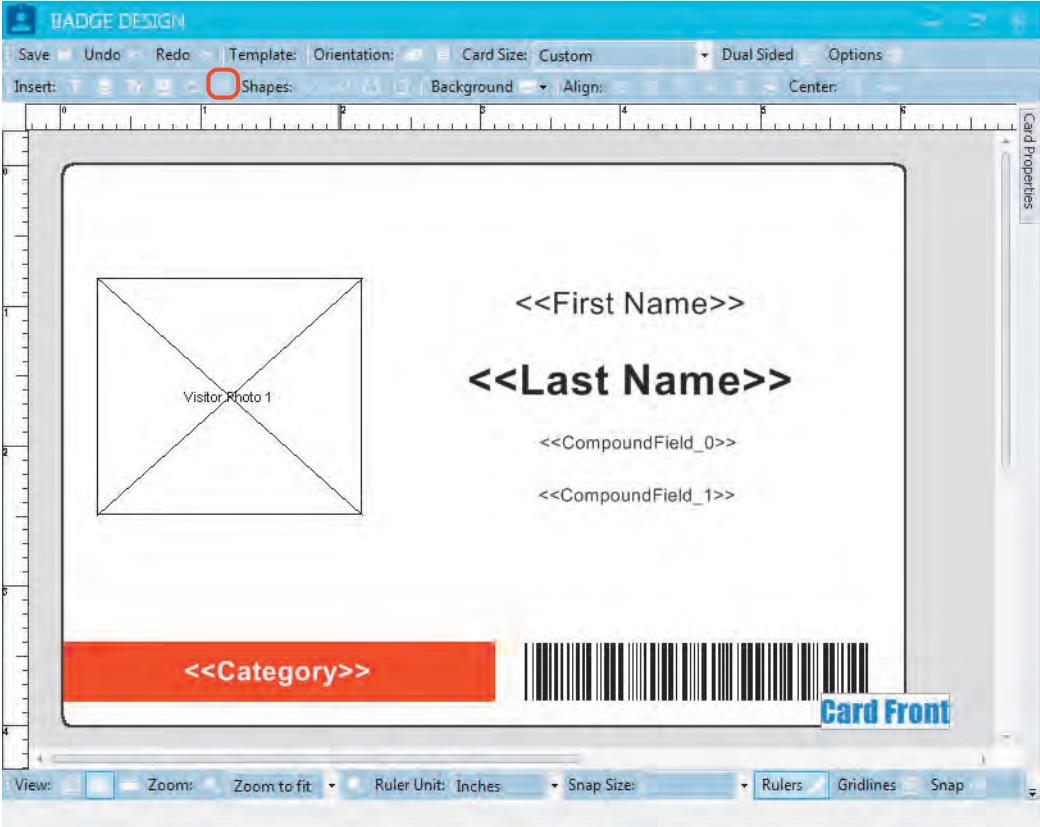


3. On the **BADGE DESIGN** window, the background is displayed on the card layout. Click **Save**.

7.3.7 Add a Barcode

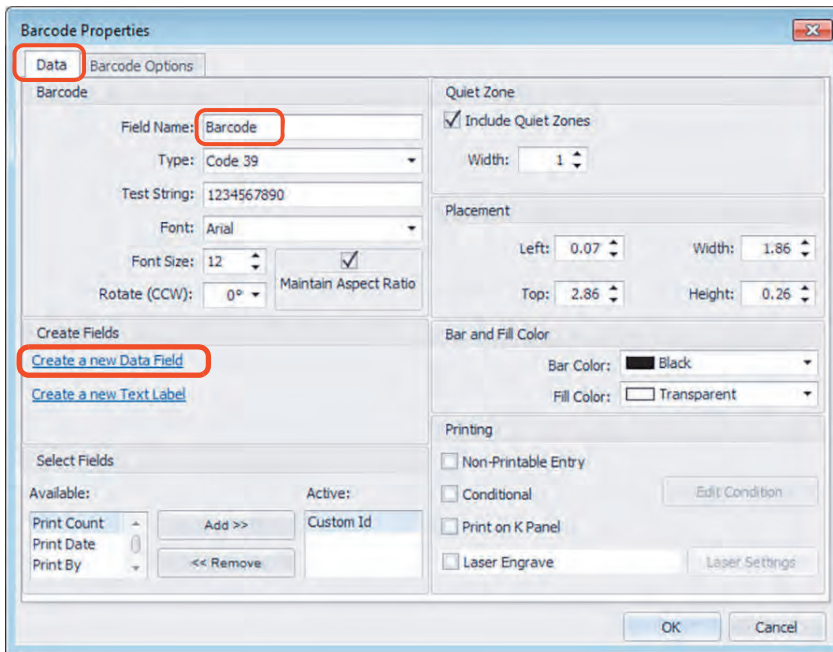
A barcode allows visitors to check out using a barcode scanner. Returning visitors can check in using a barcode scanner. For visitors entering and exiting the site multiple times during a single visit, a barcode adds additional convenience.

On the **BADGE DESIGN** window, select the **Barcode** icon.



7.3.7.1 Barcode Data Tab

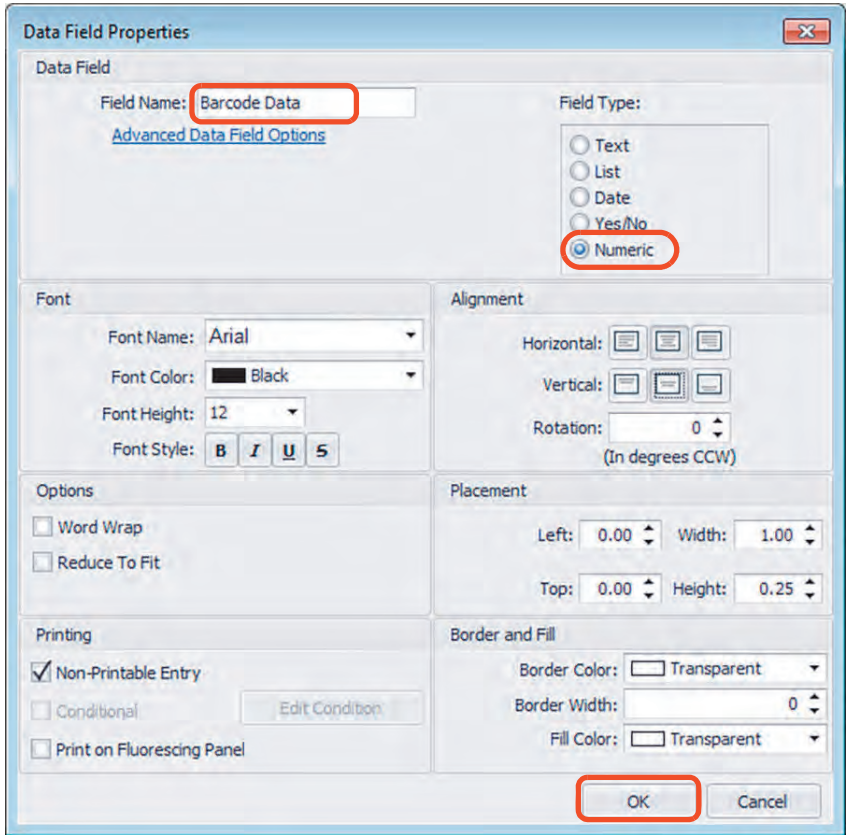
1. Click in the card display pane to open the **Barcode Properties** window.



The image shows the Barcode Properties dialog box with the Data tab selected. The dialog is divided into several sections:

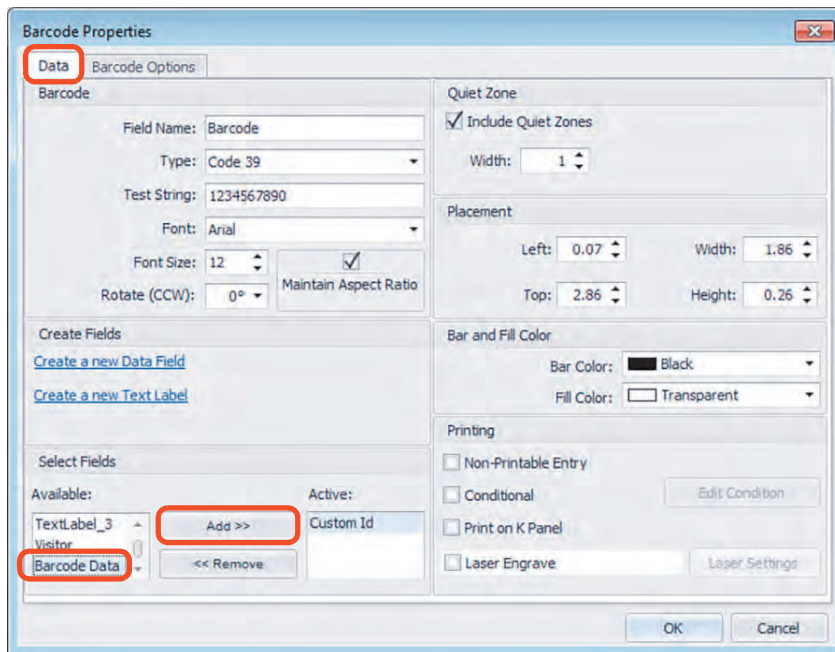
- Data Tab:** The 'Data' tab is selected and highlighted with a red box.
- Barcode Section:** Contains fields for 'Field Name' (Barcode, highlighted with a red box), 'Type' (Code 39), 'Test String' (1234567890), 'Font' (Arial), 'Font Size' (12), 'Rotate (CCW)' (0°), and a 'Maintain Aspect Ratio' checkbox.
- Quiet Zone Section:** Includes a checked 'Include Quiet Zones' checkbox and a 'Width' field set to 1.
- Placement Section:** Contains four numeric input fields: 'Left' (0.07), 'Width' (1.86), 'Top' (2.86), and 'Height' (0.26).
- Create Fields Section:** Features two links: 'Create a new Data Field' (highlighted with a red box) and 'Create a new Text Label'.
- Select Fields Section:** Shows 'Available' fields (Print Count, Print Date, Print By) and 'Active' fields (Custom Id), with 'Add >>' and '<< Remove' buttons.
- Bar and Fill Color Section:** Includes 'Bar Color' (Black) and 'Fill Color' (Transparent) dropdown menus.
- Printing Section:** Contains checkboxes for 'Non-Printable Entry', 'Conditional', 'Print on K Panel', and 'Laser Engrave', along with 'Edit Condition' and 'Laser Settings' buttons.
- Buttons:** 'OK' and 'Cancel' buttons are located at the bottom right.

2. On the **Data** tab, enter a **Field Name** and select a **Create a New Data Field**.
3. On the **Data Field Properties** window, enter the **Field Name** and select the **Field Type**. Click **OK**.



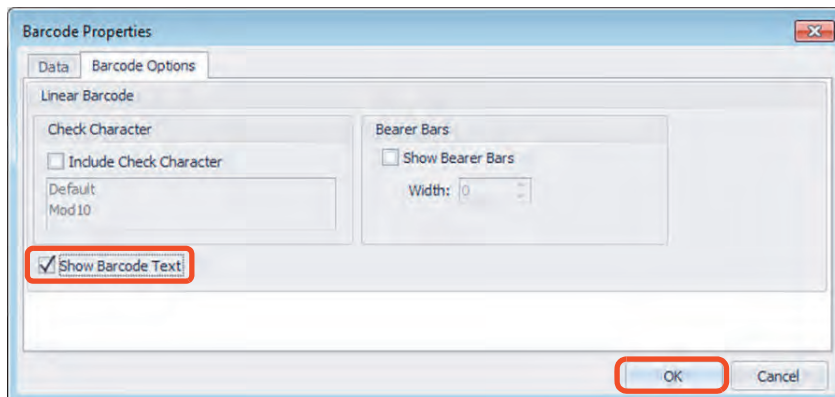
The **Barcode Properties** window is displayed again and the newly created field is listed in the Available list under Select Fields.

- On the **Data** tab, select **Barcode Data** from the **Available** pane and click **Add** to move the field to the **Active** list.



7.3.7.2 Barcode Options Tab

- On the **Barcode Properties** window, select the **Barcode Options** tab.
- Select **Show Barcode Text** and click **OK**.



- On the **BADGE DESIGN** window, the barcode is displayed on the card layout. The barcode can be positioned and sized on the card by selecting and dragging. Click **Save**.

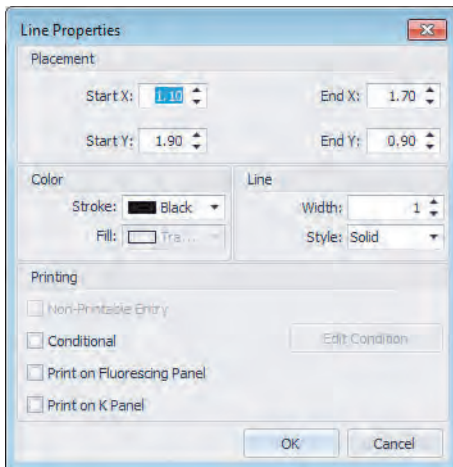
7.3.8 Shapes Group

When the required shape is selected and the position noted on the card, a Properties window opens where the settings are configured.

Shapes Group	Description
Line	Click for start of line and while holding the mouse key, drag the line to end point. Release mouse key and the Line Properties window opens.
Polyline	Click for start of line, then click where each line segment end should be. After the last segment is created, right click to display the Polyline Properties window.
Ellipse	Draw a rectangle on the page for the elliptical shape to fit in. Hold the shift key down while drawing this rectangle creates a circle. Release mouse key and the Ellipse Properties window opens.
Rectangle	Draw a rectangle on the page the desired size. Hold the shift key down while drawing this rectangle creates a square. Release mouse key and the Rectangle Properties window opens.

7.3.8.1 Line Properties Window

This is the **Line Properties** window that is displayed.

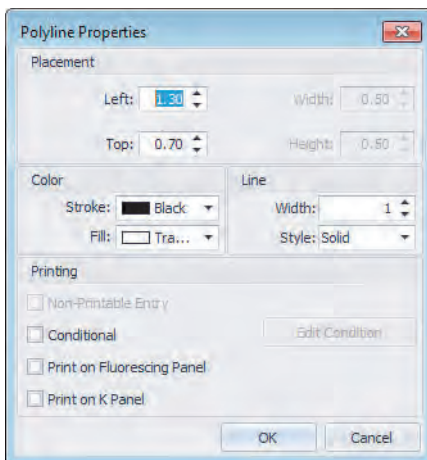


Line Properties	Description
Placement Group	
Start X	Start point (from 0,0) in the X position (horizontal).
End X	End point (from 0,0) in the X position (horizontal).
Start Y	Start point (from 0,0) in the Y position (vertical).
End Y	Start point (from 0,9) in the Y position (vertical).
Color Group	
Stroke	This is the color of the line. The colors are system based.
Fill	Disabled for EasyLobby Solo.
Line Group	

Line Properties	Description
Width	This is the width of the line in points. (There are 72 points to an inch.)
Style	There are three choices: <ul style="list-style-type: none"> • Solid • Dashed • Dotted
Printing Group	
Non-Printable Entry	Disabled for EasyLobby Solo.
Conditional	Selecting this option displays a pop-up window to set the condition.
Print on Fluorescing Panel	Select this option if the data should be viewed only with an ultra violet light.
Print on K Panel	Select this option to print the shape using the K-Panel Resin.

7.3.8.2 Polyline Properties Window

This is the **Polyline Properties** window that is displayed.

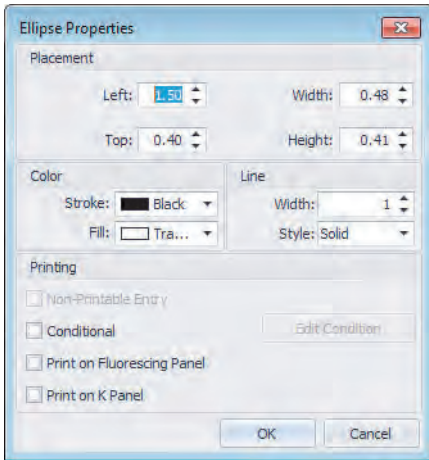


Polyline Properties	Description
Placement Group	
Left	The starting point (from 0,0) in the horizontal position.
Top	The highest point set in the vertical position when looking head-on at the card. The point location is listed from 0,0 position.
Width	Disabled for EasyLobby Solo.
Height	Disabled for EasyLobby Solo.
Color Group	
Stroke	This is the color of the line. The colors are system based.
Fill	If the polylines connect as a closed shape, this is the fill color. The colors are system based.
Line Group	

Polyline Properties	Description
Width	This is the width of the line in points. (There are 72 points to an inch.)
Style	There are three choices: <ul style="list-style-type: none">• Solid• Dashed• Dotted
Printing Group	
Non-Printable Entry	Disabled for EasyLobby Solo.
Conditional	Select this option to display a pop-up window to set the condition.
Print on Fluorescing Panel	Select this option if the data should be viewed only with ultra violet light.
Print on K Panel	Selecting this option prints the shape using the K-Panel Resin.

7.3.8.3 Ellipse Properties Window

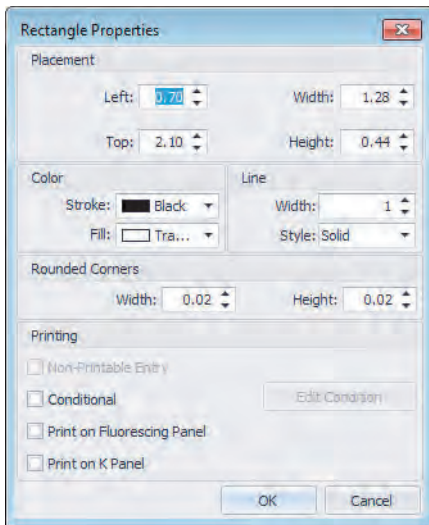
This is the **Ellipse Properties** window that is displayed.



Ellipse Properties	Description
Placement Group	
Left	The starting point (from 0,0) in the horizontal position.
Top	The highest point set in the vertical position when looking head-on at the card. The point location is listed from 0,0 position.
Width	System calculated total width from side to side
Height	System calculated total width from top to bottom.
Color Group	
Stroke	This is the color of the line. The colors are system based.
Fill	This is the ellipse fill color. The colors are system based.
Line Group	
Width	This is the width of the line in points. (there are 72 points to an inch.)
Style	There are three choices: <ul style="list-style-type: none"> • Solid • Sashed • Dotted
Printing Group	
Non-Printable Entry	Disabled for EasyLobby Solo.
Conditional	Select this option to display a pop-up window to set the condition.
Print on Fluorescing Panel	Select this option if the data should be viewed only with ultra violet light.
Print on K Panel	Select this option to print the shape using the K-Panel Resin.

7.3.8.4 Rectangle Properties Window

This is the **Rectangle Properties** window that is displayed.



Rectangle Properties	Description
Placement Group	
Left	The starting point (from 0,0) in the horizontal position.
Top	The highest point set in the vertical position when looking head-on at the card. The point location is listed from 0,0 position.
Width	System calculated total width from side to side
Height	System calculated total width from top to bottom.
Color Group	
Stroke	This is the color of the line. The colors are system based.
Fill	This is the ellipse fill color. The colors are system based.
Line Group	
Width	This is the width of the line in points. (There are 72 points to an inch.)
Style	There are three choices: <ul style="list-style-type: none"> • Solid • Sashed • Dotted
Rounded Corners Group	
Width	<ul style="list-style-type: none"> • Width is the distance in pixels from vertical lines inward. • Height is distance in pixels from horizontal line downward or upward. • Both of these combined created a rounded corner. • Setting the same value for each creates a nice, even corner rounding. • As the settings increase the square photo can eventually become a circle photo.
Height	

Rectangle Properties	Description
Printing Group	
Non-Printable Entry	Disabled for EasyLobby Solo.
Conditional	Select this option to display a pop-up window to set the condition.
Print on Fluorescing Panel	Select this option if the data should be viewed only with ultra violet light.
Print on K Panel	Select this option to print the shape using the K-Panel Resin.

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Device Options

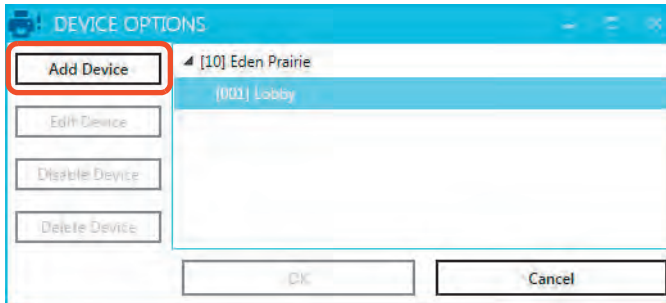
8.1 Supported Devices

EasyLobby Solo supports the following peripherals:

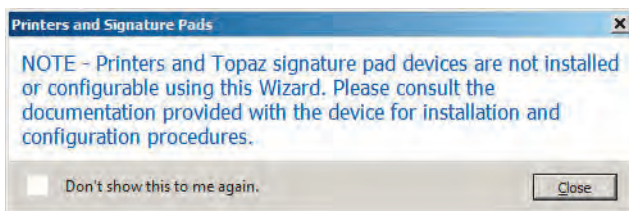
- **ID Scanners:** To capture information directly from a business card or a government issued ID.
- **Barcode Scanners:** To scan custom IDs issued to visitors for quick check out and multi-day check in and out.
- **Prox Card Readers:** To determine visitor permission levels or area access restrictions.
- **Cameras:** To capture pictures for visitor or employee registration.
- **Signature Pads:** To capture visitor signatures.
- **Mag Stripe Readers:** To read a magnetic stripe on an ID card.
- **Badge Printers:** To print custom ID badges.

8.2 Add a Device

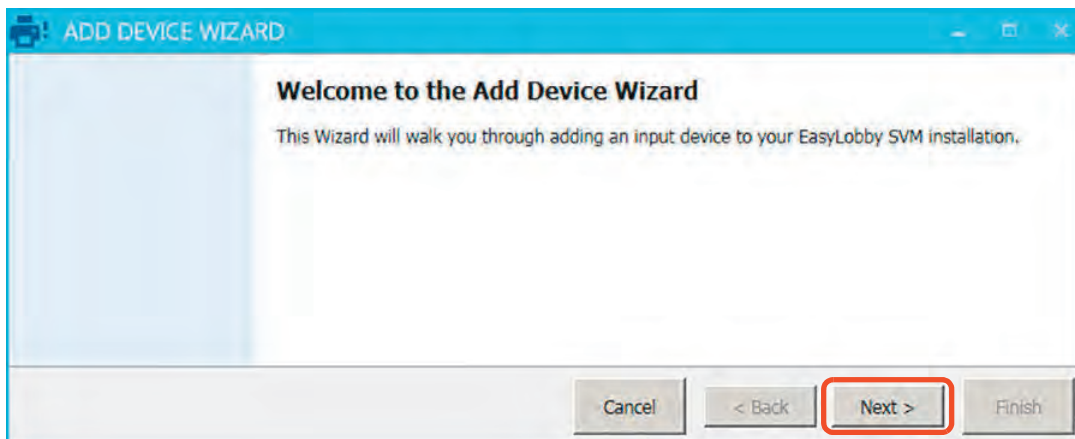
1. Connect your equipment.
2. Select **Admin > OPTIONS > Device Options**.
3. On the **DEVICE OPTIONS** window, click **Add Device**.



4. A note is displayed for the **Printers and Signature Pads**, to direct the user to the pad device installation documentation. If not applicable, select **Don't show this to me again** and click **Close**.



5. On the **ADD DEVICE WIZARD** window, click **Next**.



8.2.1 ID Scanner

1. Select **ID Scanner** and select the device from the pull-down menu. Click **Next**.

ADD DEVICE WIZARD

Device Type
Please choose a device category:

- ID Scanner
Card Scanning Solutions (ScanShell, SnapShell)
- COM Port Device (Barcode)
- Camera
- Keyboard Input (Barcode)

Buttons: Cancel, < Back, **Next >**, Finish

2. Select the settings for the device and click **Finish**.

ADD DEVICE WIZARD

Device Settings
Select settings for your device

SCANSHELL LICENSE / PASSPORT SCANNER

Device Name: License / Passport Scanner

Capture Photo Vertical Student Id
 Capture Full Image

Enable	Region Id/Name	
<input checked="" type="checkbox"/>	0 - United States	<input type="checkbox"/>
<input type="checkbox"/>	1 - Canada	<input type="checkbox"/>
<input type="checkbox"/>	2 - South/Central America	<input type="checkbox"/>
<input type="checkbox"/>	3 - Europe	<input type="checkbox"/>

SCANSHELL. 1000 OPTIONS

Button 1: License & Card
Button 2: Passport
Button 3: Student Id

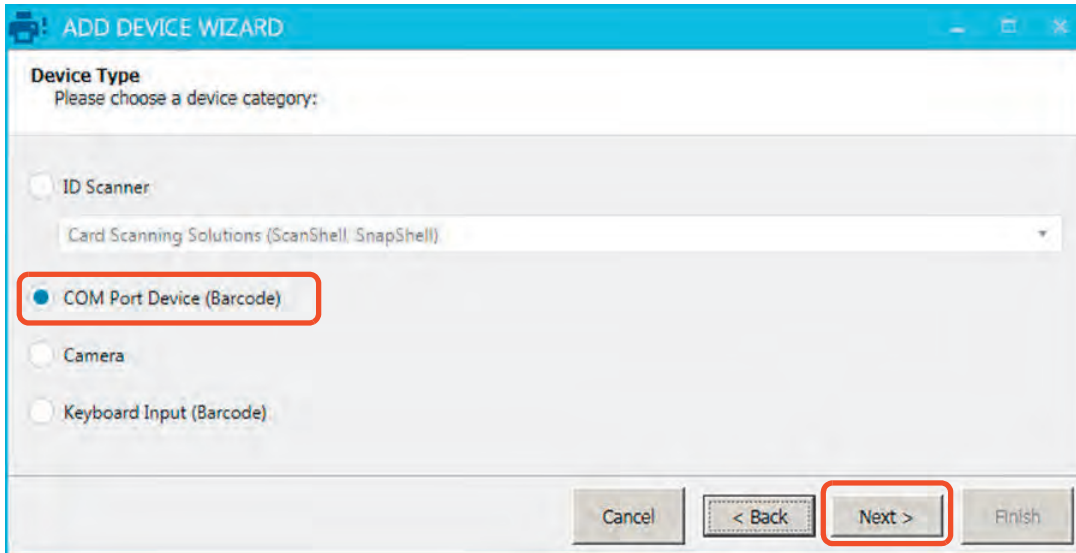
SNAPSHELL OPTIONS

Document Type: License & Card

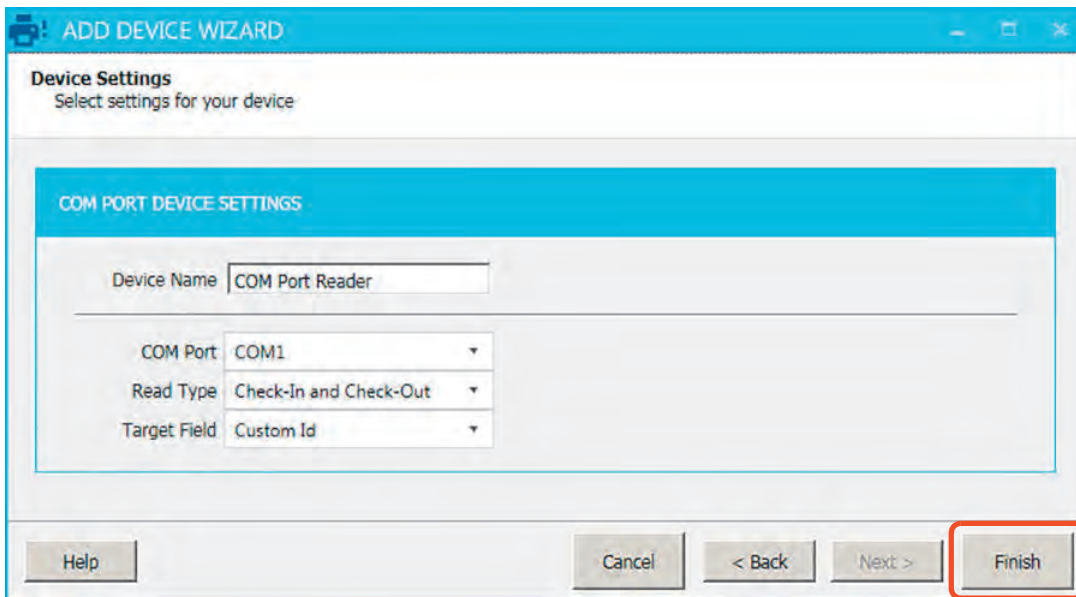
Buttons: Help, Cancel, < Back, Next >, **Finish**

8.2.2 COM Port Device (Barcode)

1. Select **COM Port Device (Barcode)** and click **Next**.



2. Select the settings for the device and click **Finish**.



8.2.3 Camera

1. Select **Camera** and click **Next**.

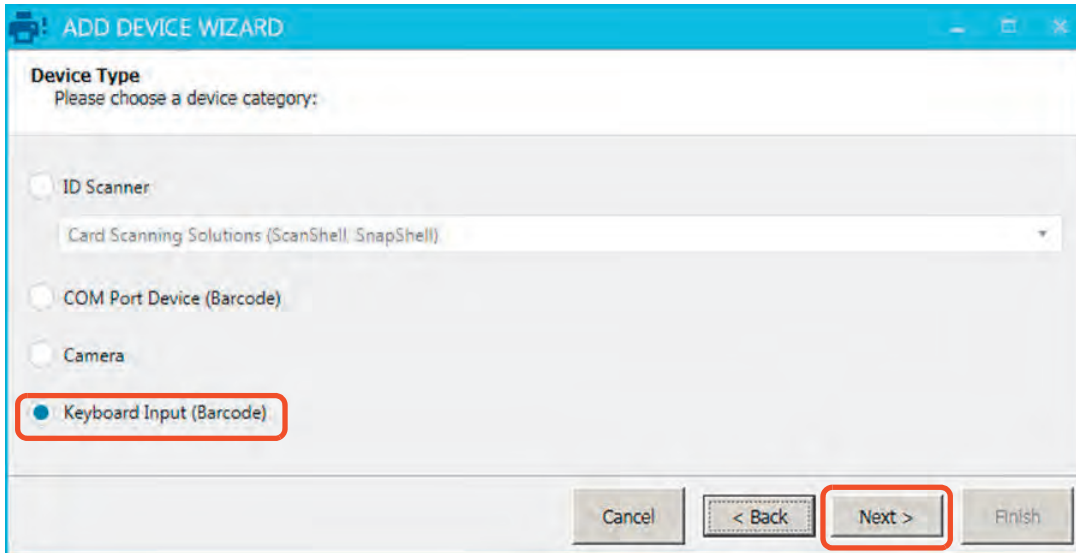
The screenshot shows the 'ADD DEVICE WIZARD' window with the 'Device Type' section. The instruction 'Please choose a device category:' is displayed. There are four radio button options: 'ID Scanner', 'COM Port Device (Barcode)', 'Camera', and 'Keyboard Input (Barcode)'. The 'Camera' option is selected and highlighted with a red box. Below the options is a pull-down menu showing 'Card Scanning Solutions (ScanShell, SnapShell)'. At the bottom of the window, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'. The 'Next >' button is highlighted with a red box.

2. Select the camera type from the pull-down menu. Click **Test** to verify the camera is set up. The camera should take a picture and display it in the window.
3. Click **Finish**.

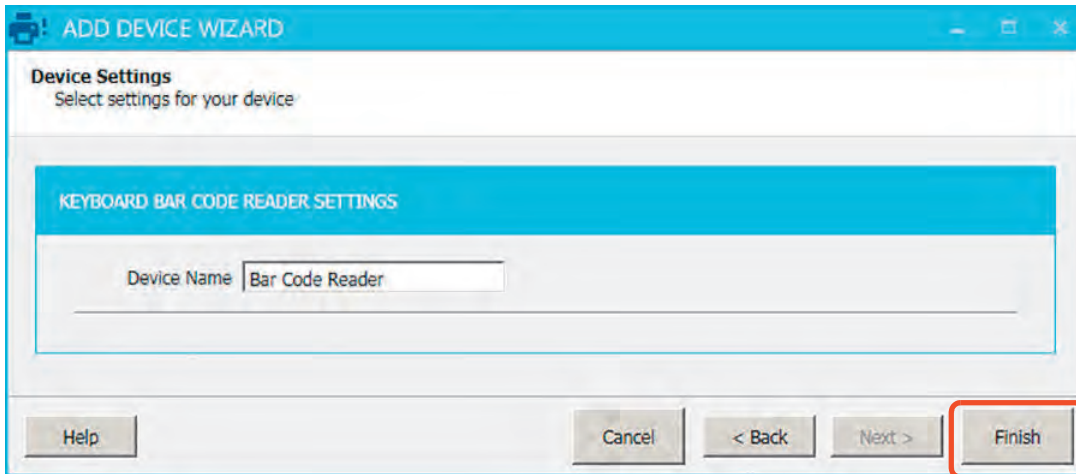
The screenshot shows the 'ADD DEVICE WIZARD' window with the 'Camera Device Settings' section. The instruction 'Enter a device name and select a camera device from the list' is displayed. The 'CAMERA SETTINGS' section contains a 'Device Name' text box with 'Image Capture Camera' entered, and a 'Camera' pull-down menu with 'Integrated Webcam' selected. Below these is a large empty rectangular area for a camera preview and a 'Test' button. At the bottom of the window, there are five buttons: 'Help', 'Cancel', '< Back', 'Next >', and 'Finish'. The 'Finish' button is highlighted with a red box.

8.2.4 Keyboard Input (Barcode)

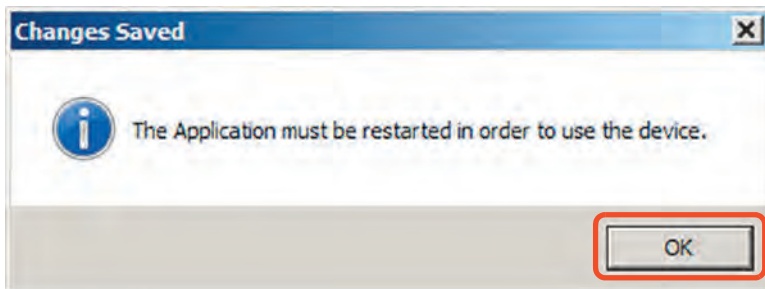
1. Select **Keyboard Input (Barcode)** and click **Next**.



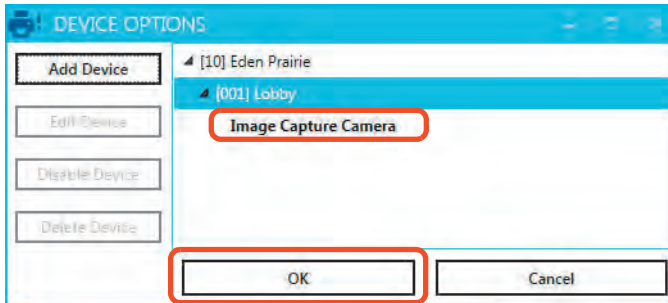
2. Select the settings for the device and click **Finish**.



3. Click **OK** to restart the application and save the device configuration.



- The device is added to the Device list. Click **OK**.



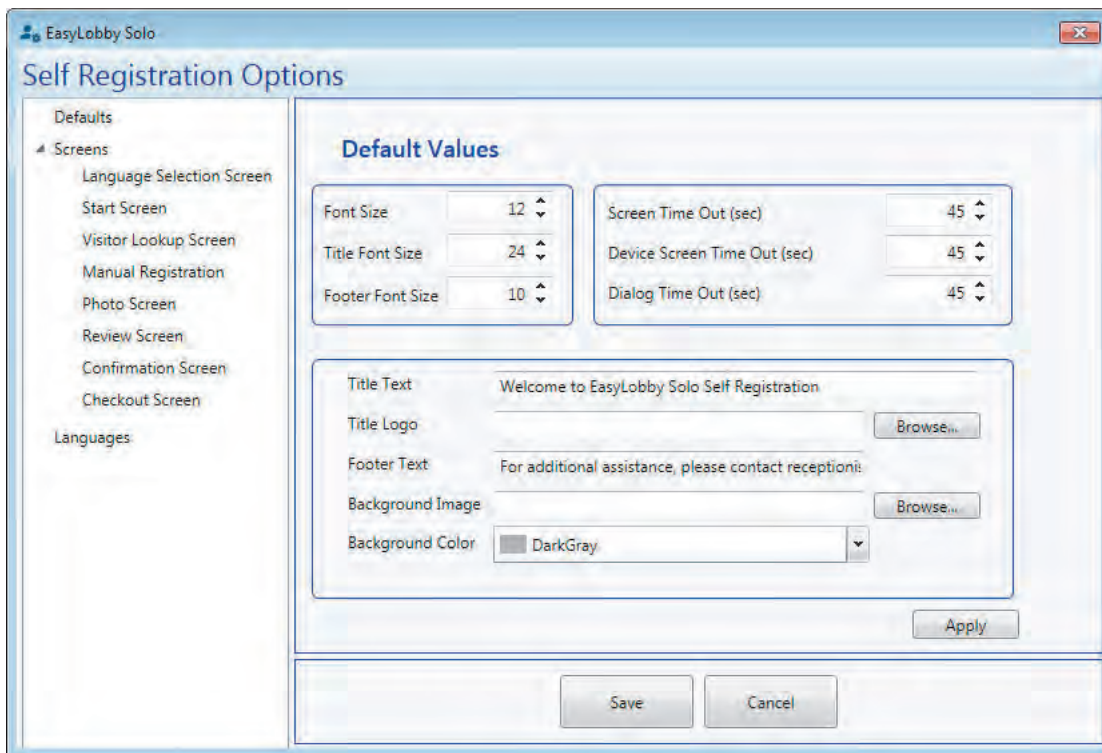
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Self Registration Configuration

EasyLobby Solo has the ability to run unattended in Self Registration mode. This chapter describes how to customize the **Self Registration Module** to allow visitors to check themselves in.

9.1 Initial Setup

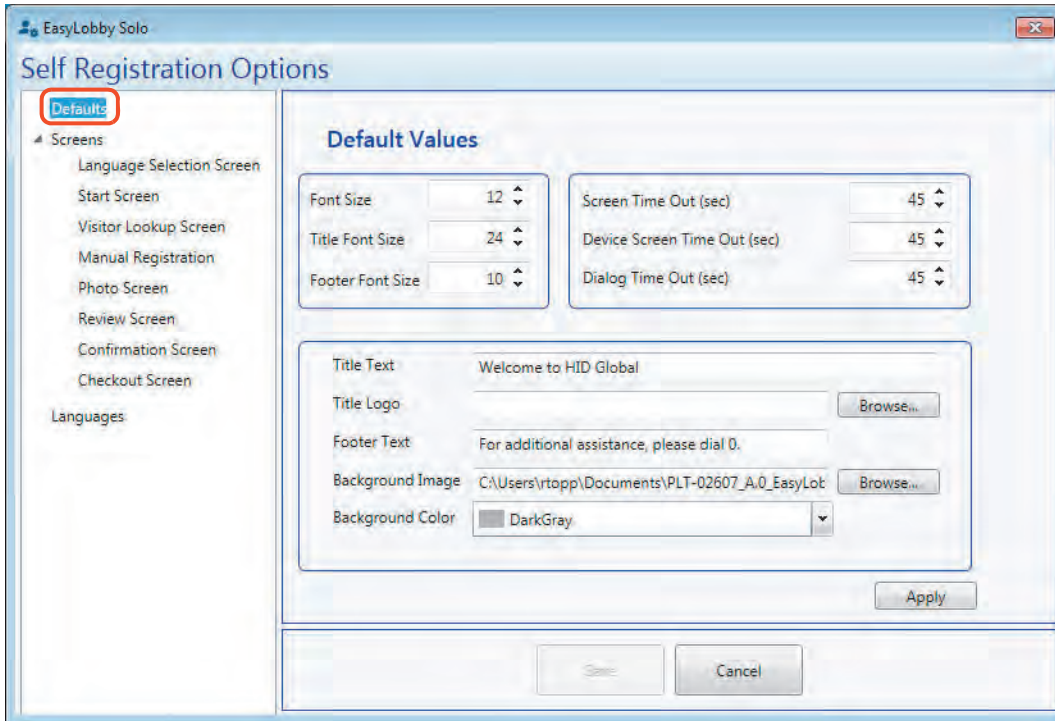
1. Open the EasyLobby Solo application.
2. Select **Admin > OPTIONS > Self Registration Options**.



9.1.1 Defaults Options

The Defaults section sets the background for all of the Self Registration screens, as well as the timeout increments.

Note: For this example, a background image was created with the company logo, which is placed on each screen.



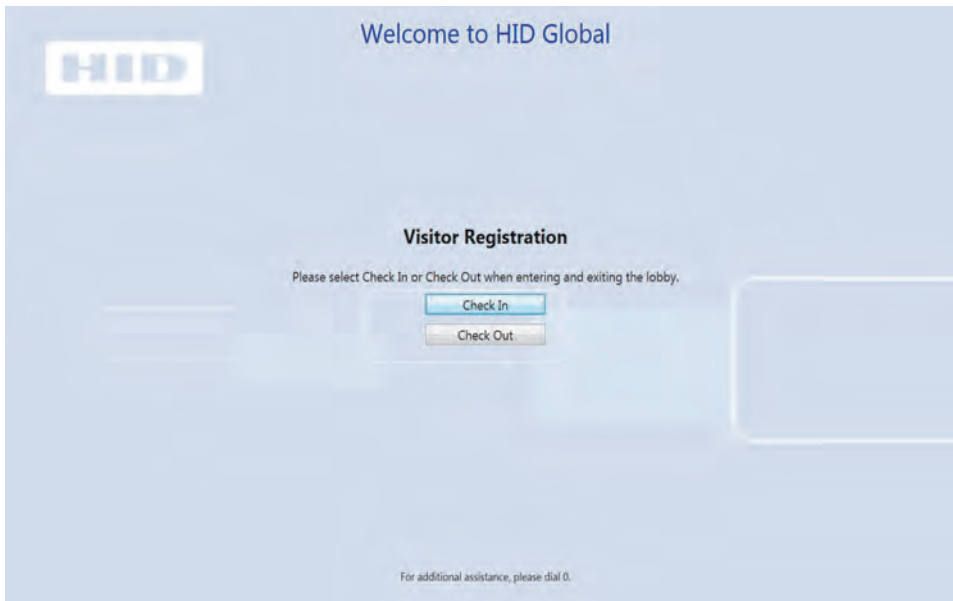
Option	Description
Font Size	Allows the user to set the font sizes for the text on the background. Note: Maximum recommended font size is 24.
Time Out (sec)	Allows the user to set the screen timeout in seconds.
Title Text	This is the text at the top of all the screens and can be modified to meet your requirements.
Title Logo	Browse to select a company logo graphic that is placed in the top right corner of the background of each Self Registration screen. Note: This is placed on top of the Background color or Background image, whichever is selected.
Footer Text	This is the text at the bottom of all the screens and can be modified to meet your requirements.
Background Image	Browse to select a graphic for the background of each Self Registration screen.
Background Color	Select a color from the palette, for the background of each Self Registration screen. Note: This is not seen if a background image is selected.



The New Background



Default Screen

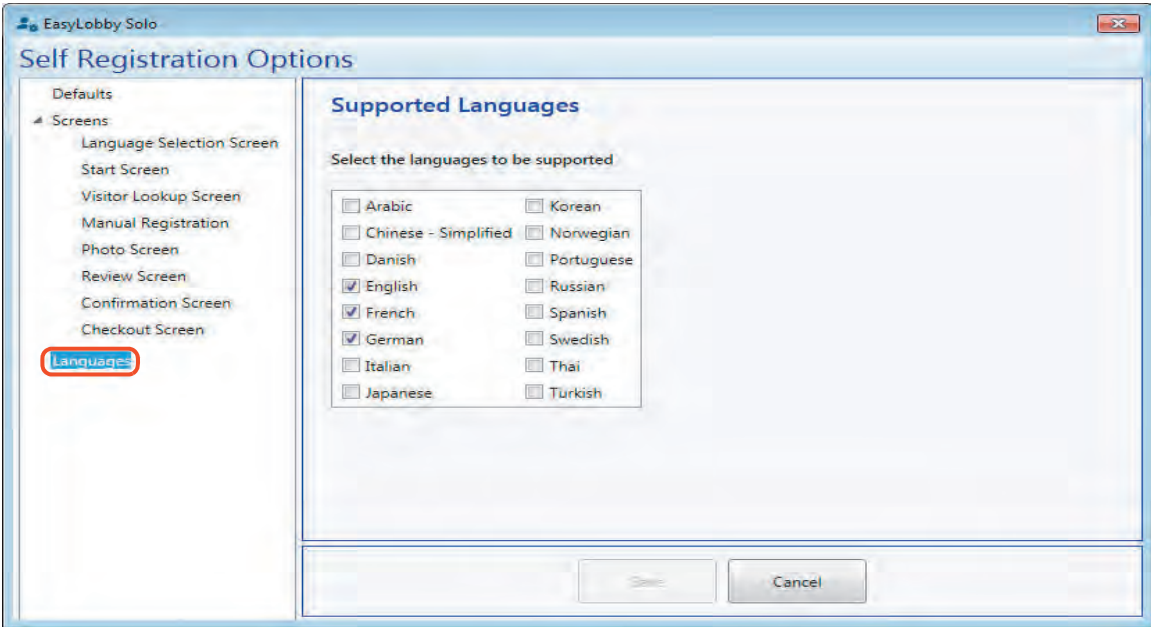


Customized Screen Example

9.1.2 Languages Options

The Languages Options allows the user to select multiple languages for the Self Registration screens. When the Screen options are selected, these languages display in the languages pane and can easily be selected. **Note:** Users interested in modifying the language should contact technical support for assistance.

When the language is selected in one/all of the screen options, the user enters the text to appear on the screen in that language.



9.1.3 Screens Options

These options configure the text and miscellaneous functions on the Self Registration screens.

Show Instructions: This option is available on each Screen Setup window and simply allows the system to show or hide the instructions that are listed on the Screen Setup window.

Languages: For each Screen Setup window in the following sections, there are language options. Once the languages have been defined, each screen should have the instructions for that screen translated and entered with the associated language selected.

For example, if French, German, and English are selected, each of the Screen Setup windows in the following sections would have the instructions translated into French, German, and English. Then when a visitor selects French, all the following screens would display in that language, the same when other languages are selected.

To set the languages that are used at this site, see *Section 9.1.2: Languages Options* for detailed instructions. **Note:** Users interested in modifying the language should contact technical support for assistance.

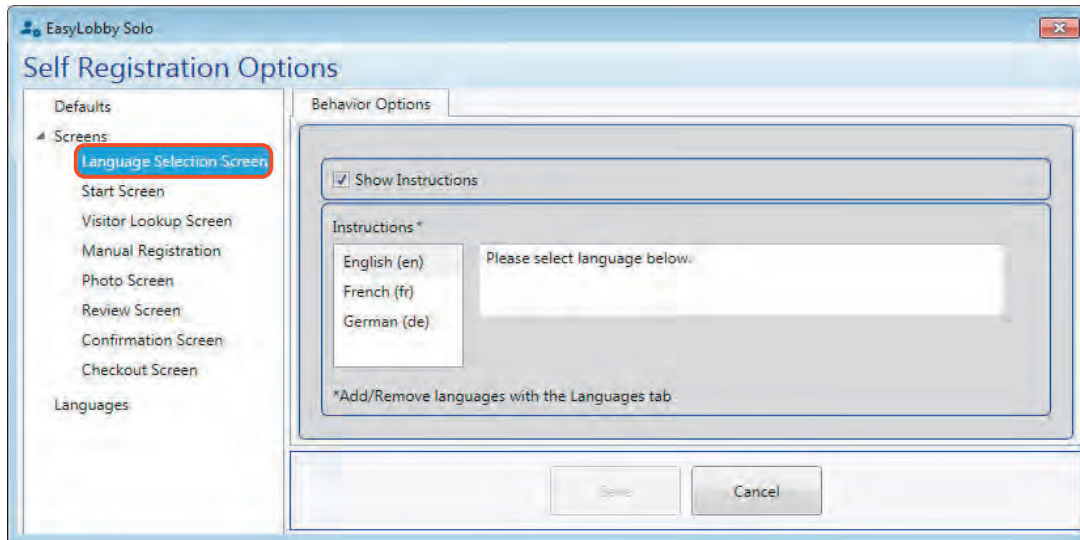
9.1.3.1 Language Selection Screen

This window allows the user to configure the instructions on the *Select Languages Screen*.

Note: Users interested in modifying the language should contact technical support for assistance.

Note: This screen only appears if more than one language is selected. See *Section 9.1.2: Languages Options* for detailed instructions.

If more than one language is selected, then the instructions should be translated and entered into the field with the associated language selected.



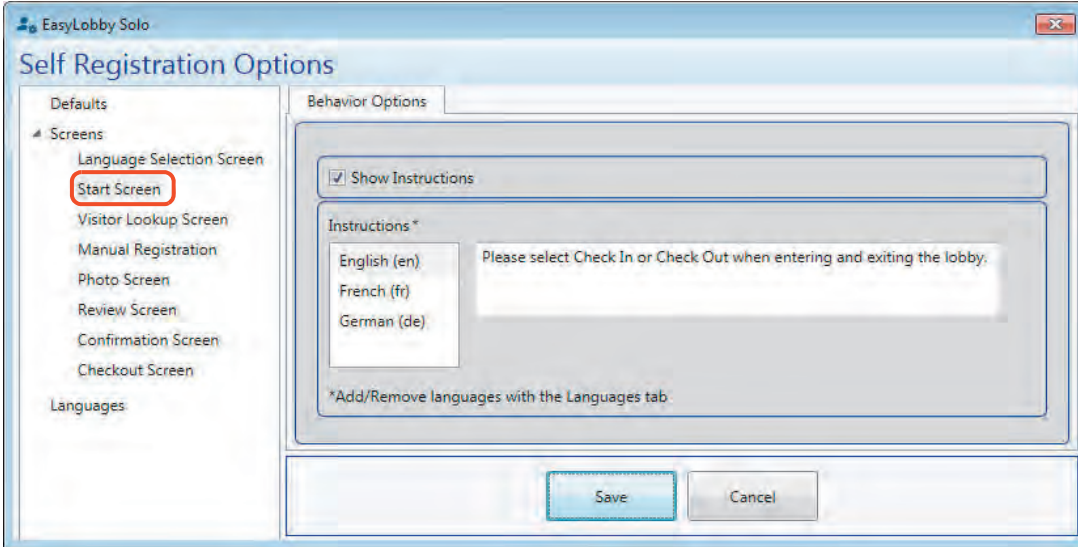
The Language Selection Screen



9.1.3.2 Start Screen

This window allows the user to configure the instructions on the *Start Screen*.

Note: Make sure to enter the translated text for each language by selecting the language in the Language pane, then enter the translated text in the Instructions field.



The Start Screen



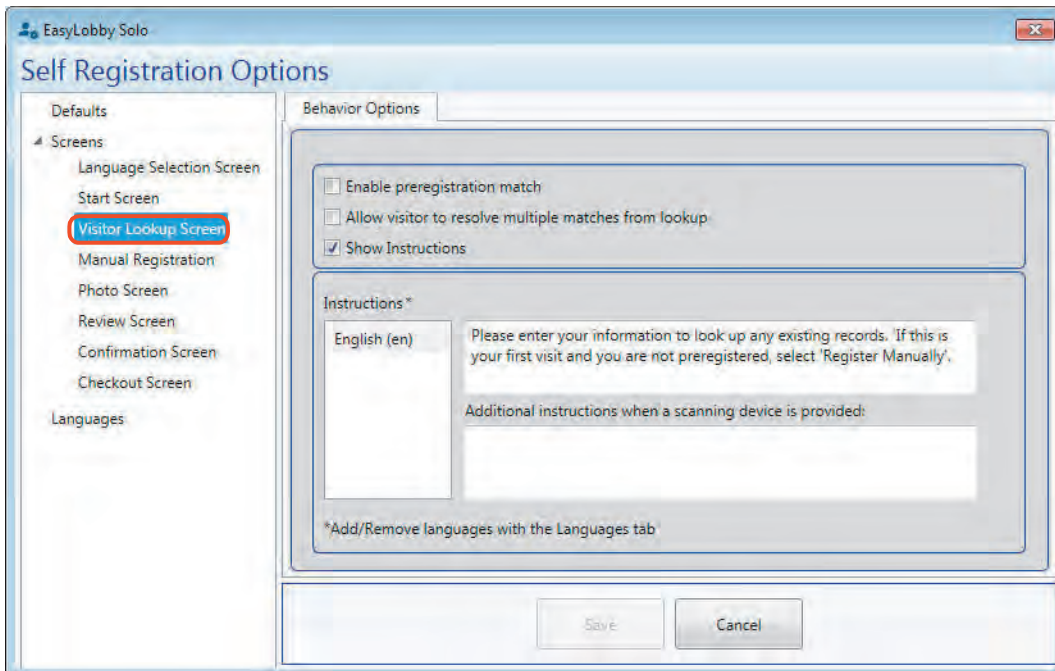
9.1.3.3 Visitor Lookup Screen

This window allows the user to configure the instructions on the *Visitor Lookup Screen*.

Enable preregistration match: This options allows the system to match the lookup information with current preregistration information.

Allow visitor to resolve multiple matches from lookup: This option allows the visitor to resolve any match issues that may occur. For example, multiple name matches. This displays other visitor names in the event of a possible match.

Note: Make sure to enter the translated text for each language by selecting the language in the Language pane, then enter the translated text in the Instructions field.



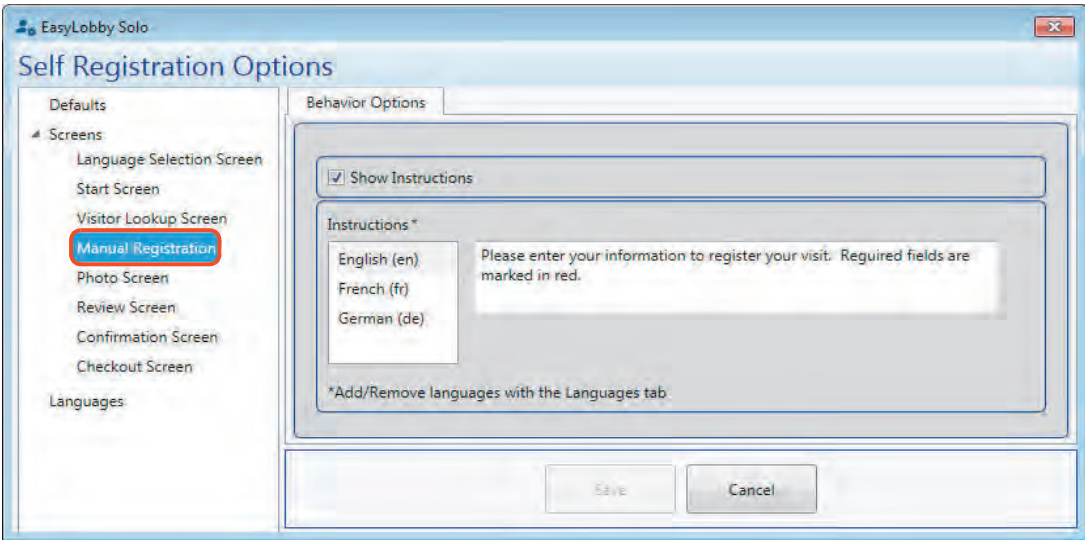
The Visitor Lookup Screen



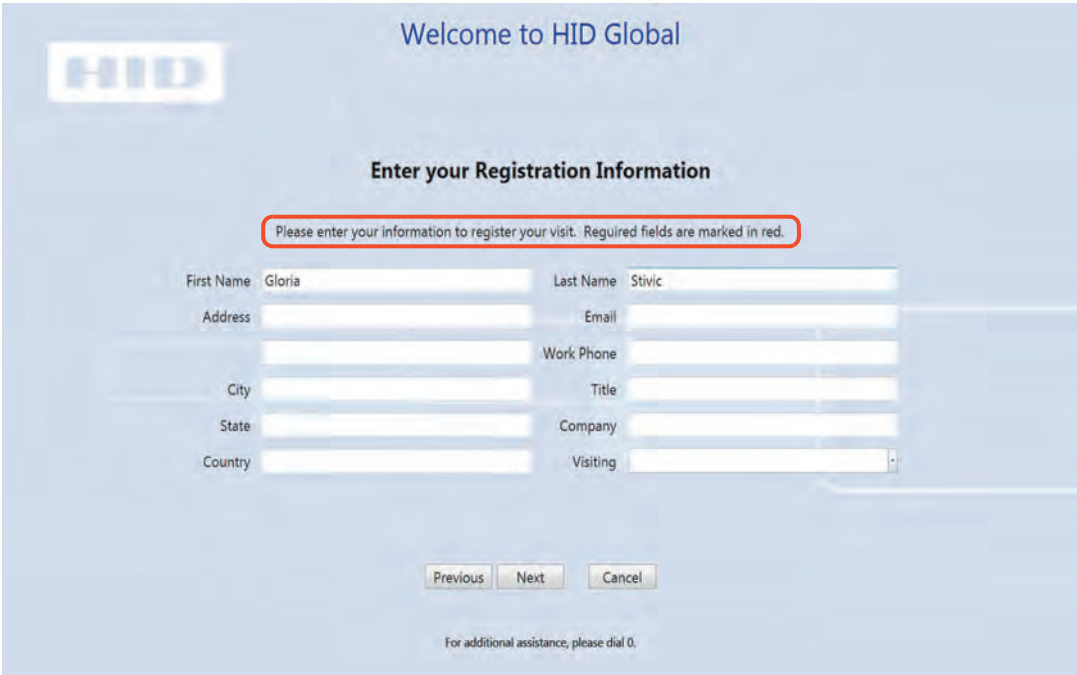
9.1.3.4 Manual Registration Screen

This window allows the user to configure the instructions on the *Manual Registration Screen*.

Note: Make sure to enter the translated text for each language by selecting the language in the Language pane, then enter the translated text in the Instructions field.



The Manual Registration Screen



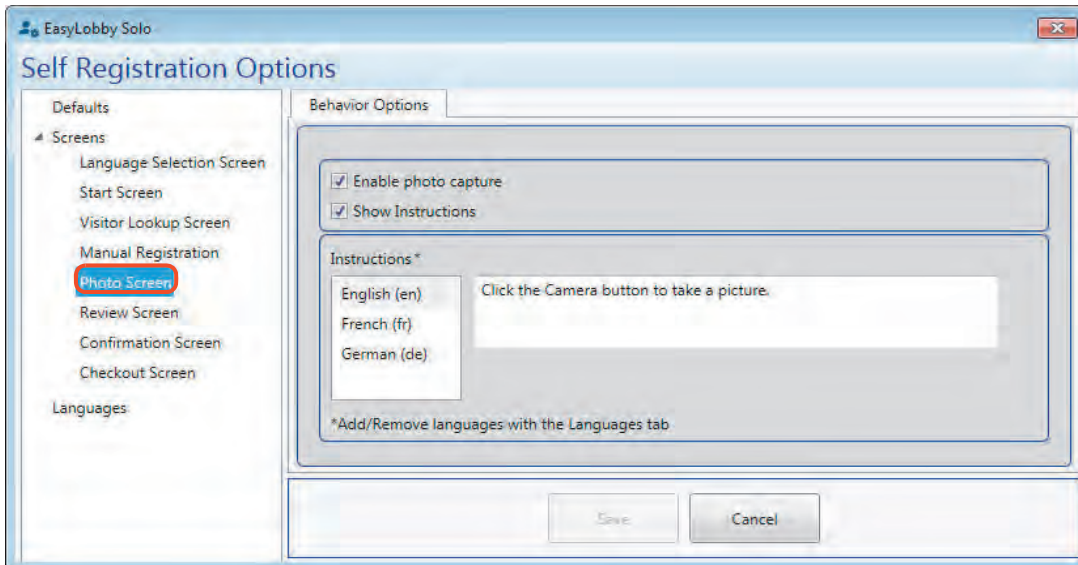
9.1.3.5 Photo Screen

This window allows the user to configure the instructions on the *Photo Screen*.

Note: The setup for the photo capture, requires a camera to be added as a device.

Enable photo capture: This option allows the visitor to take a picture of themselves before entering the site.

Note: Make sure to enter the translated text for each language by selecting the language in the Language pane, then enter the translated text in the Instructions field.



The Photo Screen



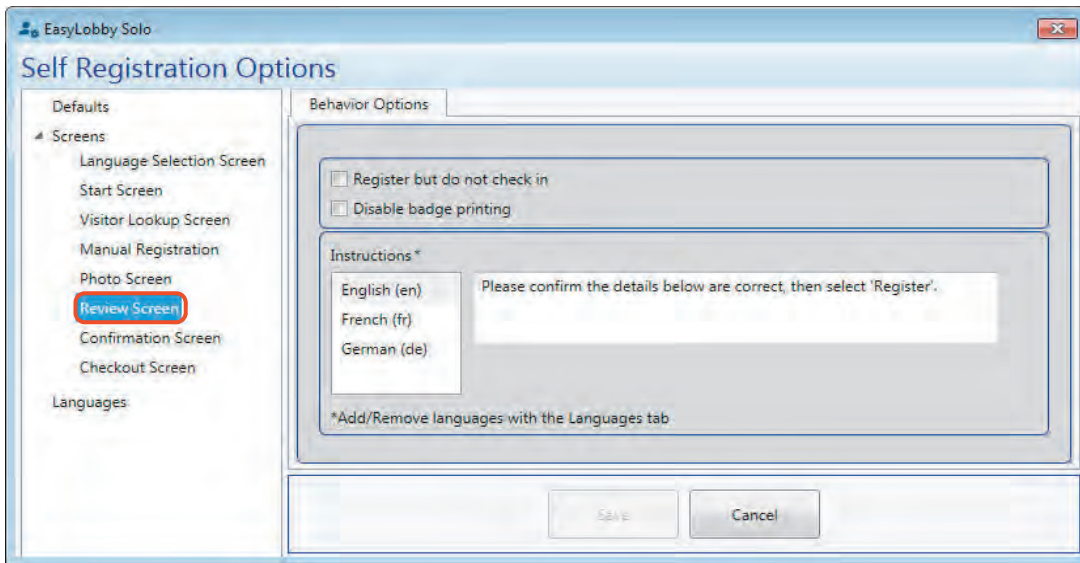
9.1.3.6 Review Screen

This window allows the user to configure the instructions on the *Review Screen*.

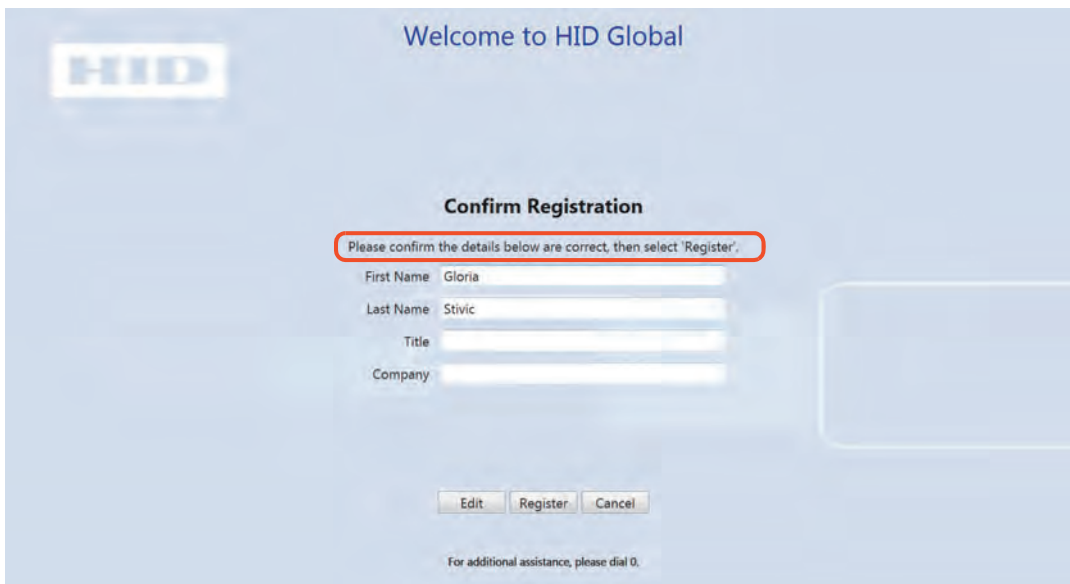
Register but do not check in: This option allows the visitor to register, but does not allow the visitor to check in. This requires that a user sign in to the **Main Application** to complete the check-in process.

Disable badge printing: This option turns off the printing of a badge.

Note: Make sure to enter the translated text for each language by selecting the language in the Language pane, then enter the translated text in the Instructions field.



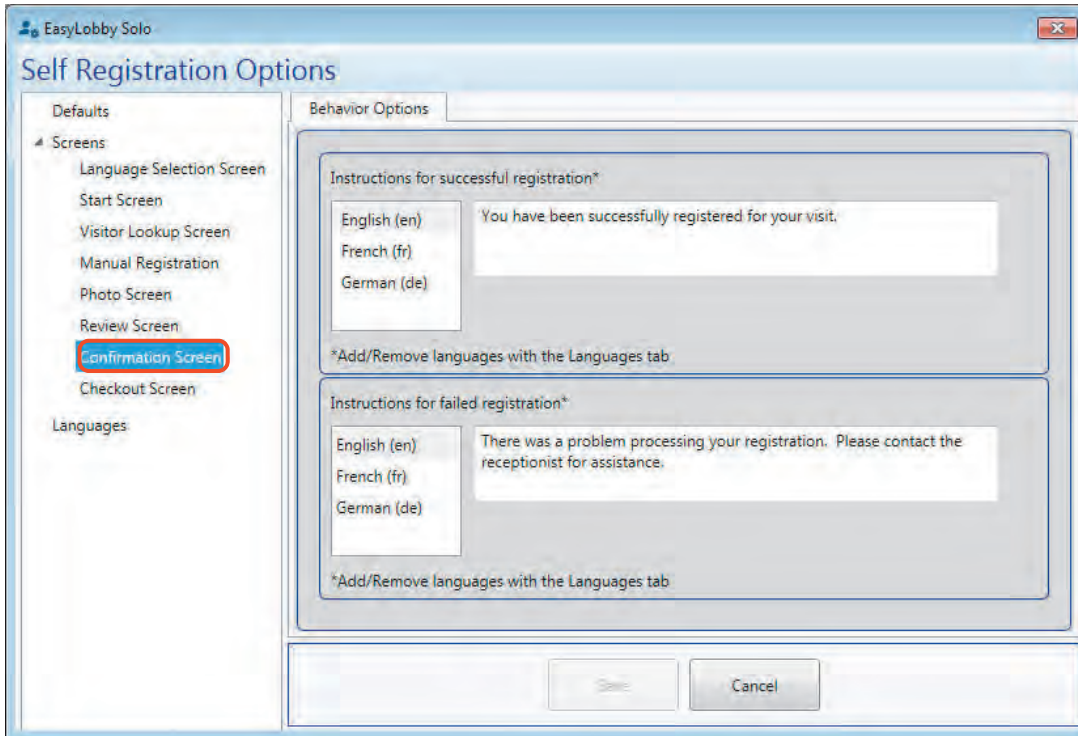
The Review Screen



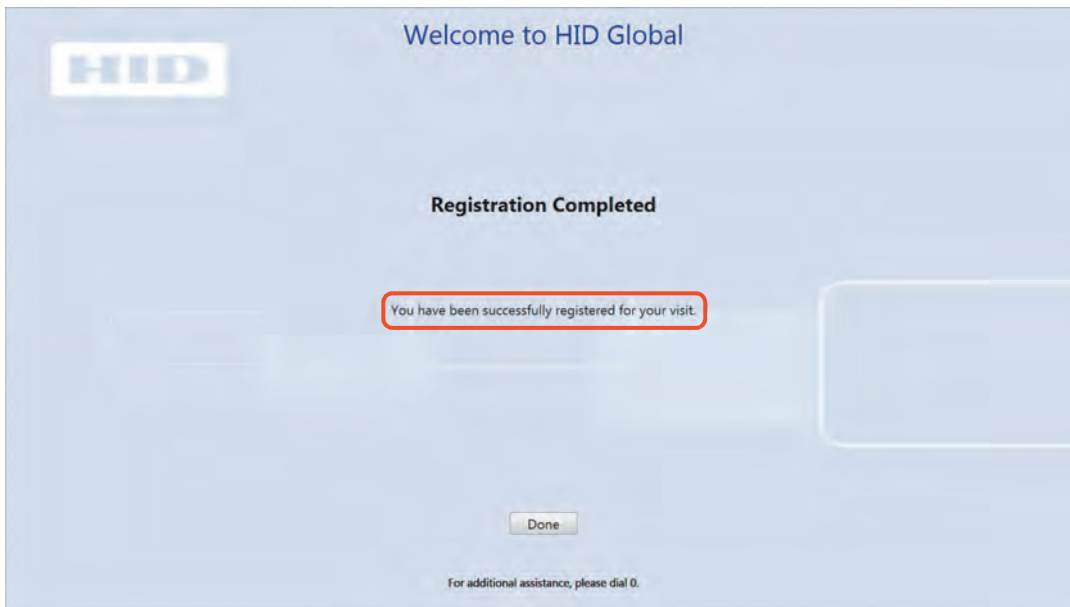
9.1.3.7 Confirmation Screen

This window allows the user to configure the instructions on the *Confirmation Screen*.

Note: Make sure to enter the translated text for each language by selecting the language in the Language pane, then enter the translated text in the Instructions field.



The Confirmation Screen



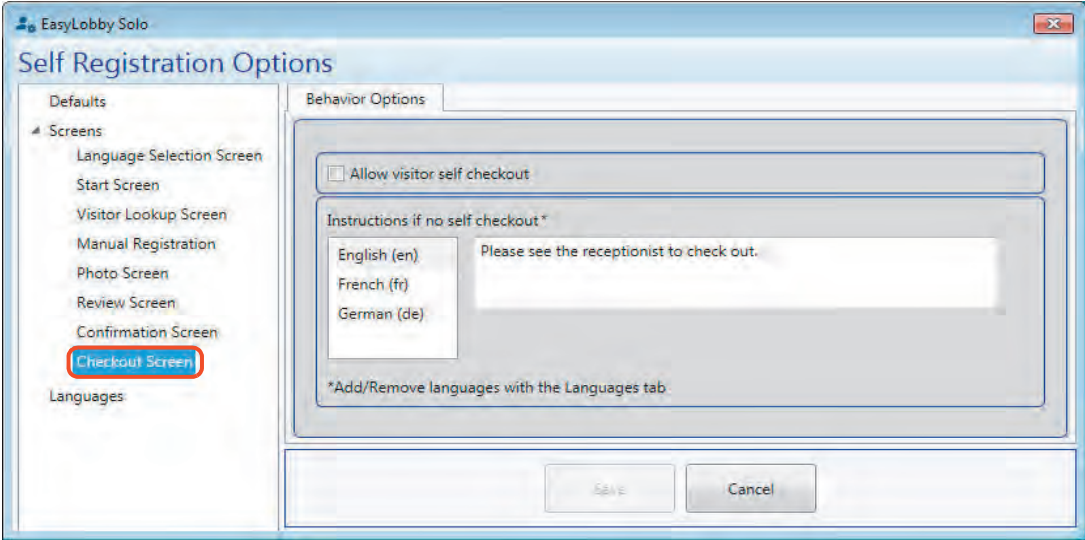
9.1.3.8 Checkout Screen

This window allows the user to configure the instructions on the *Checkout Screen*.

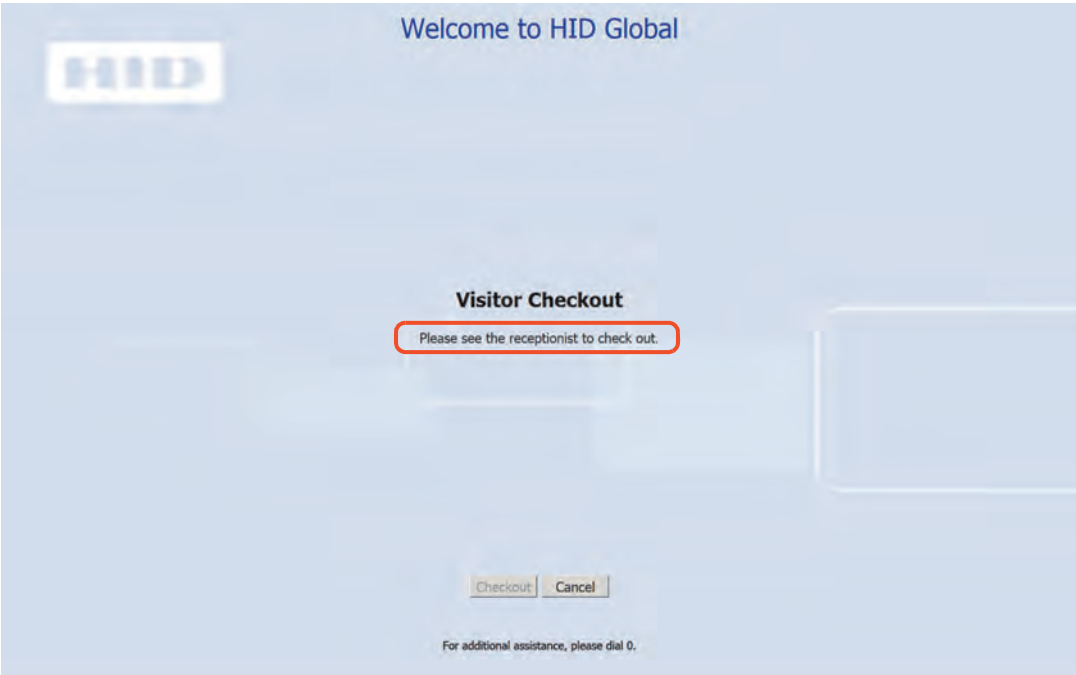
Allow visitor self checkout: This option allows the Visitor to check themselves out of the site.

In order for this feature to work, you must print a barcode or a Custom ID on the visitor badge. The visitor must then enter the Custom ID or use a barcode scanner to check out.

Note: Make sure to enter the translated text for each language by selecting the language in the Language pane, then enter the translated text in the Instructions field.



The Checkout Screen



Chapter 10

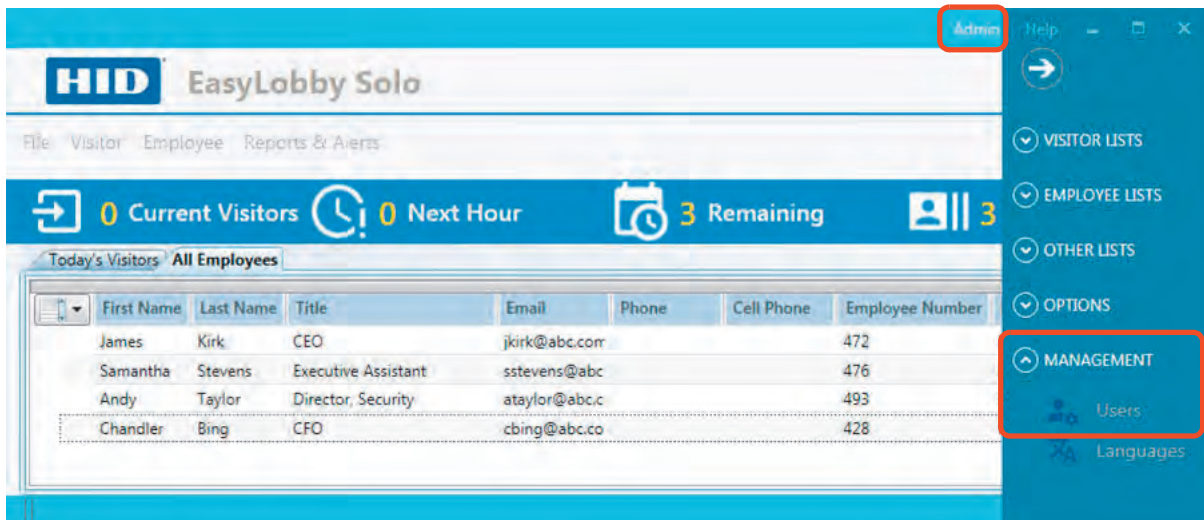
Admin Management

10.1 Users

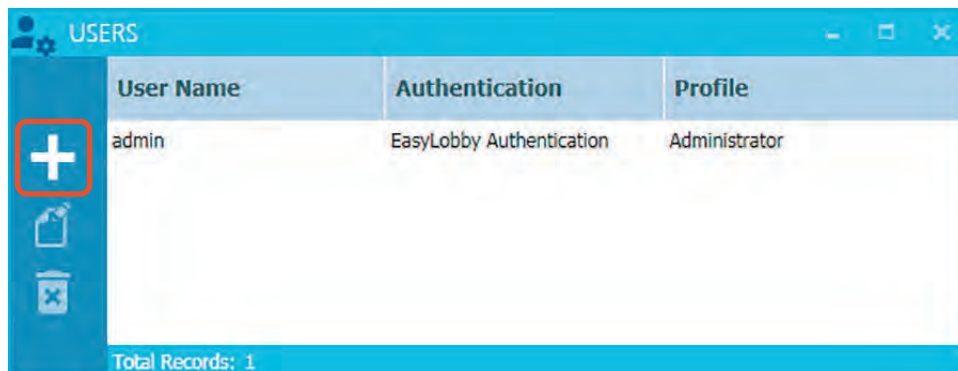
An administrator has full control of users that have access to EasyLobby Solo. This chapter covers basic User Management.

10.1.1 Add a User

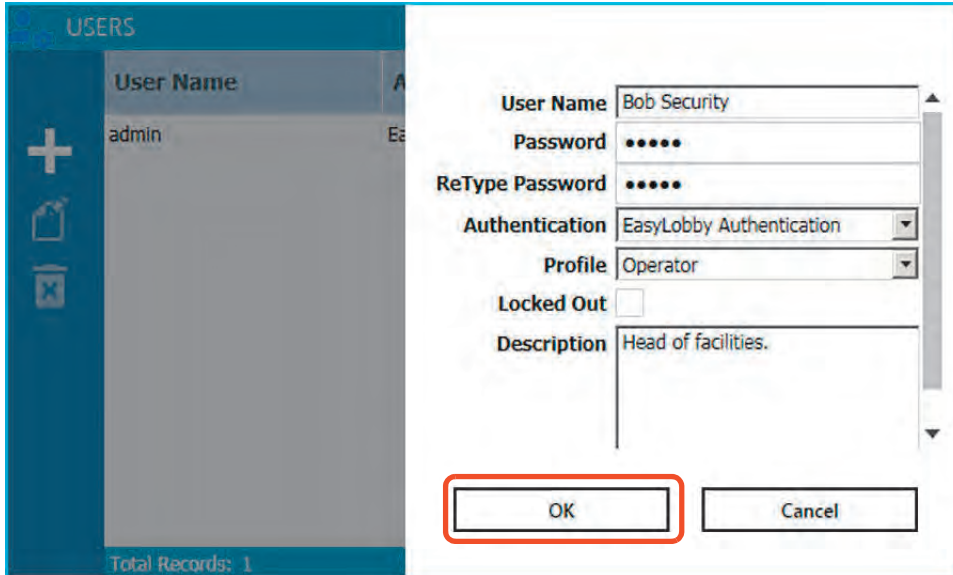
1. Select **Admin > MANAGEMENT > Users**.



2. Select **Add (+)**.

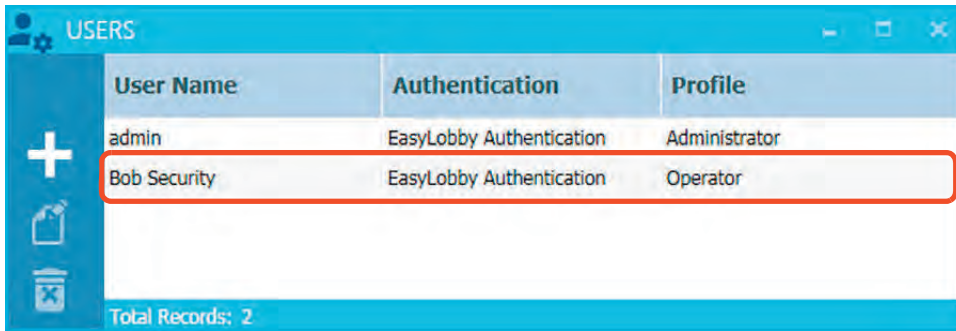


3. Enter the new user information, and click **OK**.



Option	Description
User Name	Enter the user name. Maximum of 50 characters.
Password	Enter a password for the user. Maximum of 10 characters. Re-enter the password to confirm.
Authentication	EasyLobby Authentication: This sign on checks the user password for authentication before logging the user in. Single Sign On Authentication: This sign on uses the EasyLobby Solo database to verify the use of a Microsoft Windows account name and account type. This sign on does not provide any security and does not require a password.
Profile	Administrator: The Administrator user profile type has full access to Easy Lobby Solo. Operator: The Operator user profile type has limited access. This user profile type allows a user to perform basic operations, see <i>Section 3.1: User Profile Types</i> .
Locked Out	A user is locked out of EasyLobby Solo when the number of unsuccessful login attempts has been reached. Once locked out, an administrator can reset this option by clearing the check box. See <i>Section 6.5: Customize Security Options</i> to set the number of attempts before lockout.
Description	Enter a brief description of the user.

4. The new user is added to the USERS list.

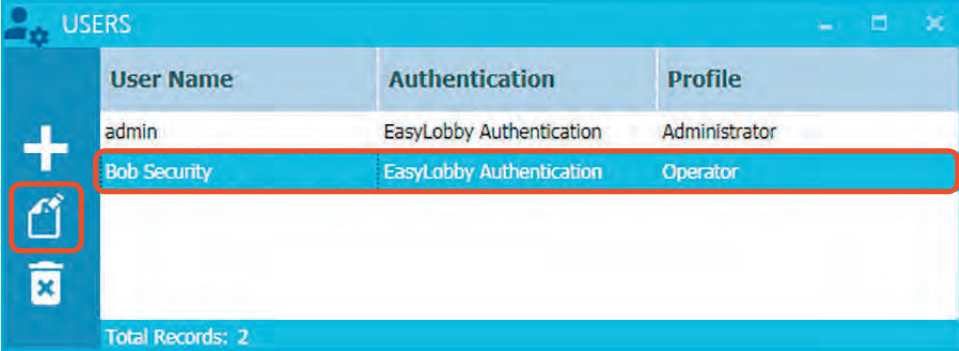


User Name	Authentication	Profile
admin	EasyLobby Authentication	Administrator
Bob Security	EasyLobby Authentication	Operator

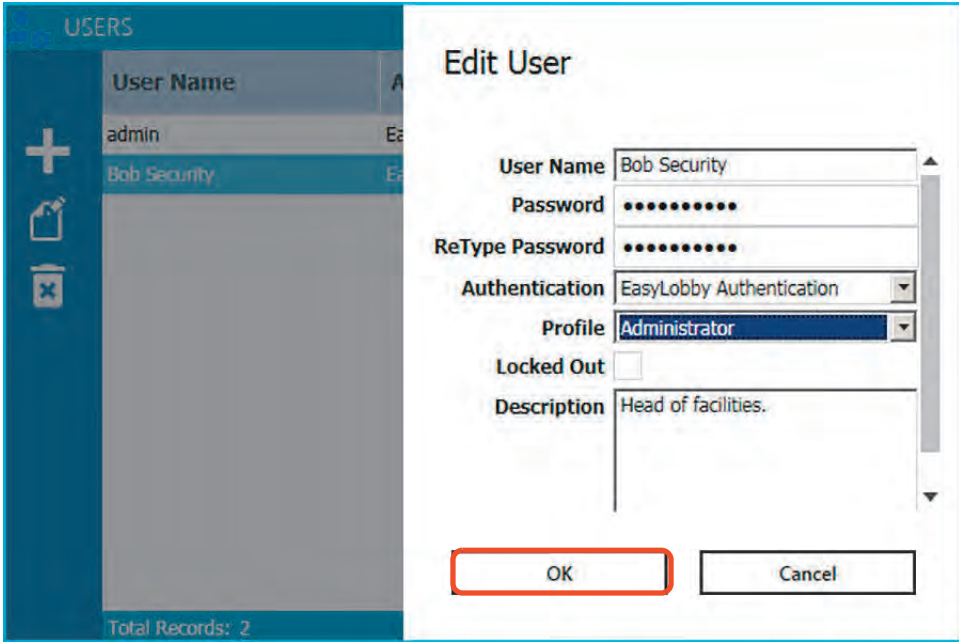
Total Records: 2

10.1.2 Modify a User

- 1. Select **Admin > MANAGEMENT > Users**.
 - 2. Select a user name from the list.
 - 3. Select **Edit**.
- Note:** The entry can also be opened by double-clicking the user name.



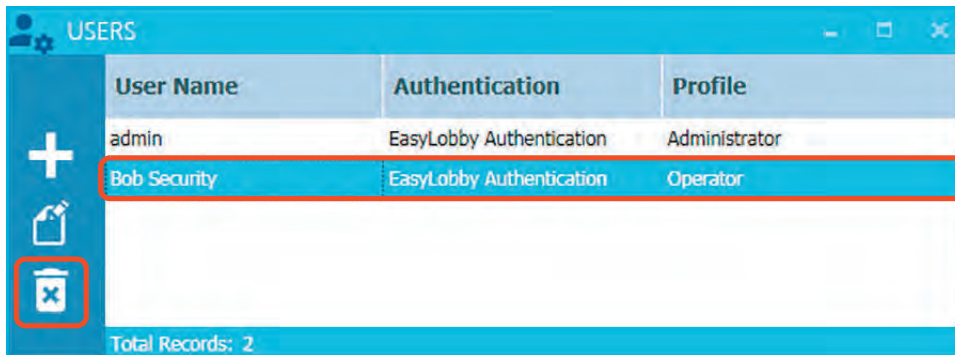
- 4. Modify the information (password, name, etc.) and click **OK**.



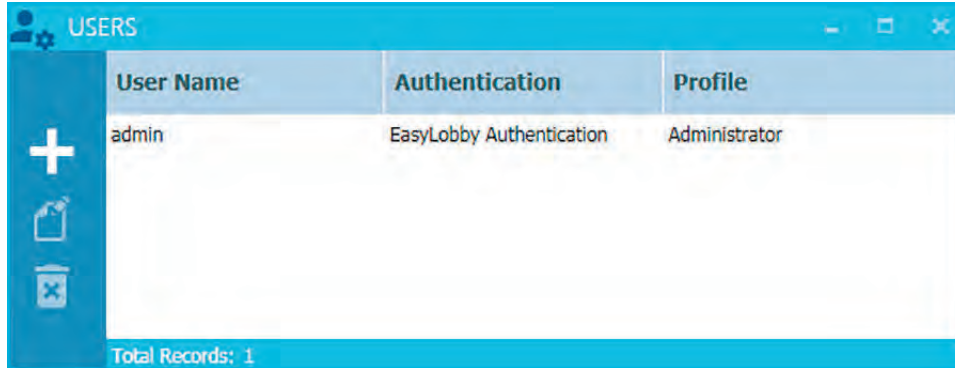
10.1.3 Delete a User

When deleting a user, any historic data about that user is removed. For example, the information recorded when an operator checks in a visitor. To preserve this information, the user account can be disabled by selecting the Locked Out option on the Edit User window. See *Section 10.1.2: Modify a User*.

1. Select **Admin > MANAGEMENT > Users**.
2. Select a user name from the list.
3. Select **Delete**.



4. When asked if you are sure you want to delete the user, click **OK**.
5. The user is removed from the USERS list.

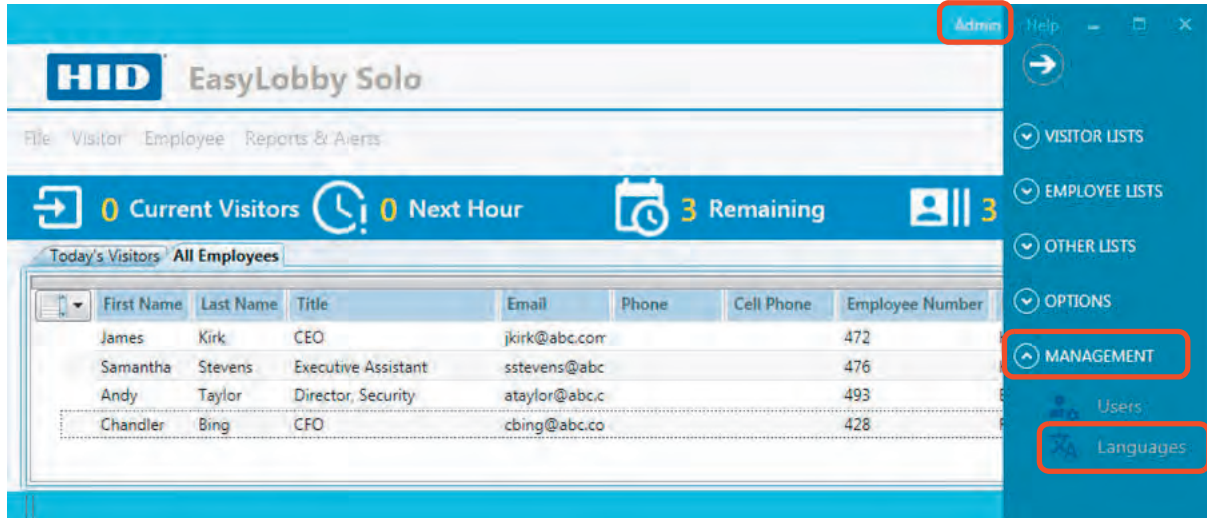


10.2 Set a Custom Language

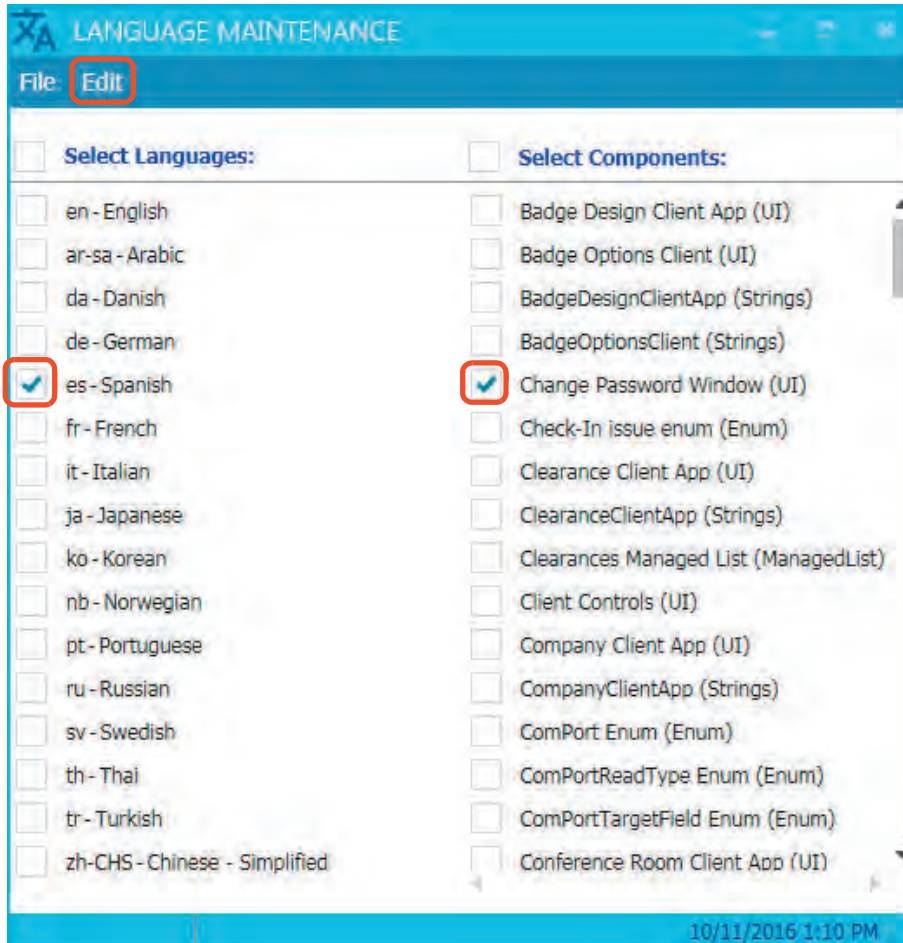
EasyLobby Solo allows language customization throughout the application.

Note: This requires sections of the application to be translated by the user. Users interested in modifying the language should contact technical support for assistance.

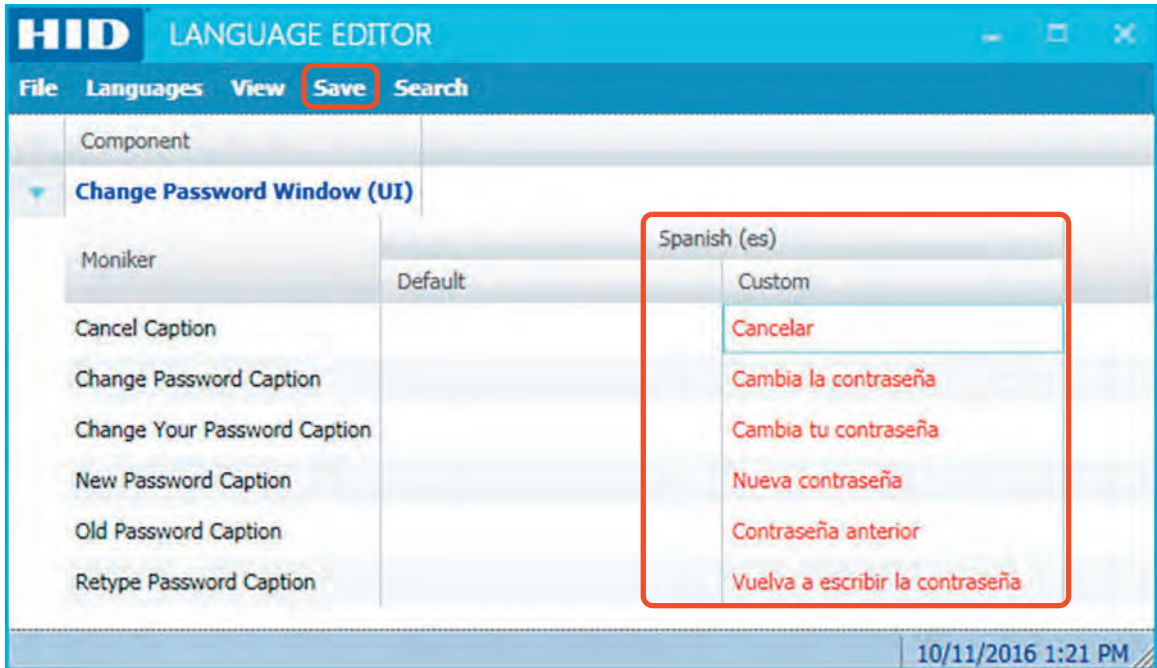
1. Select **Admin > MANAGEMENT > Languages**.



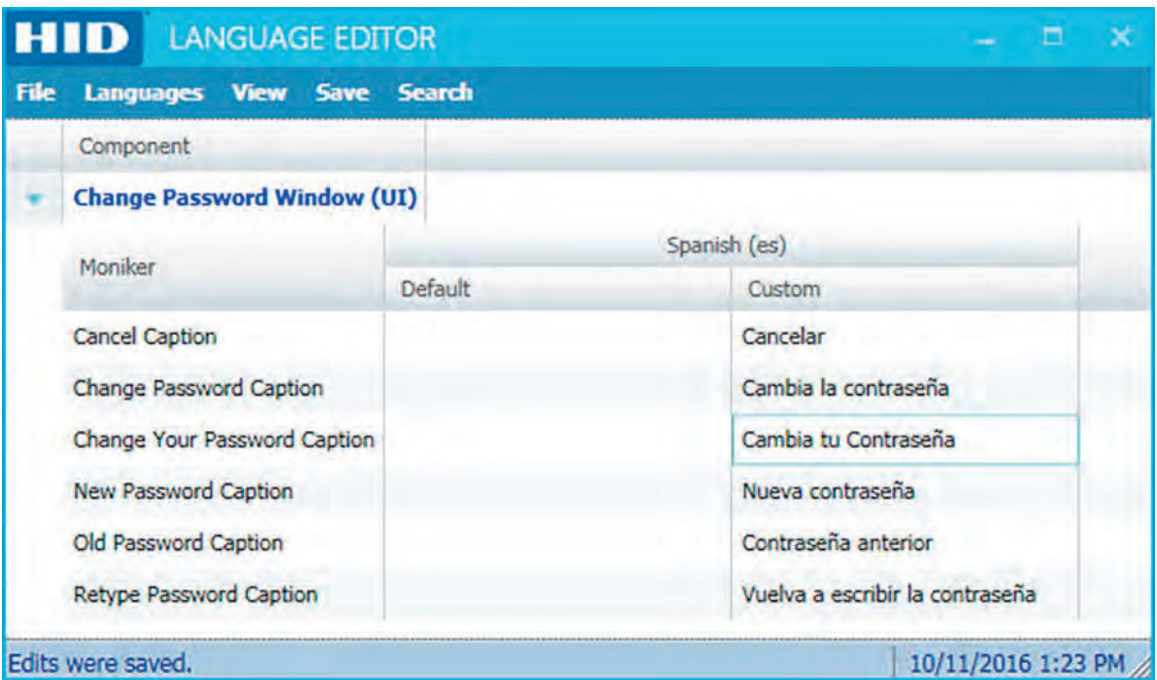
2. Select the language(s) from the **Select Languages** column.
Note: To select all languages, select the check box at the top of the column.
3. Select the component to have translated from the **Select Components** column.
Note: To select all components, select the check box at the top of the column.
4. Select **Edit**.



- 5. Enter the translations in the specific language cell and click **Save**.



- 6. A confirmation is displayed at the bottom of the window.



- 7. Restart EasyLobby Solo.

Note: The language on the workstation must match the language setting in EasyLobby Solo to display the changes correctly. See **Region and Language** on the Windows Control Panel.

Revision History

Date	Description	Version
November 2016	First Release	A.0

