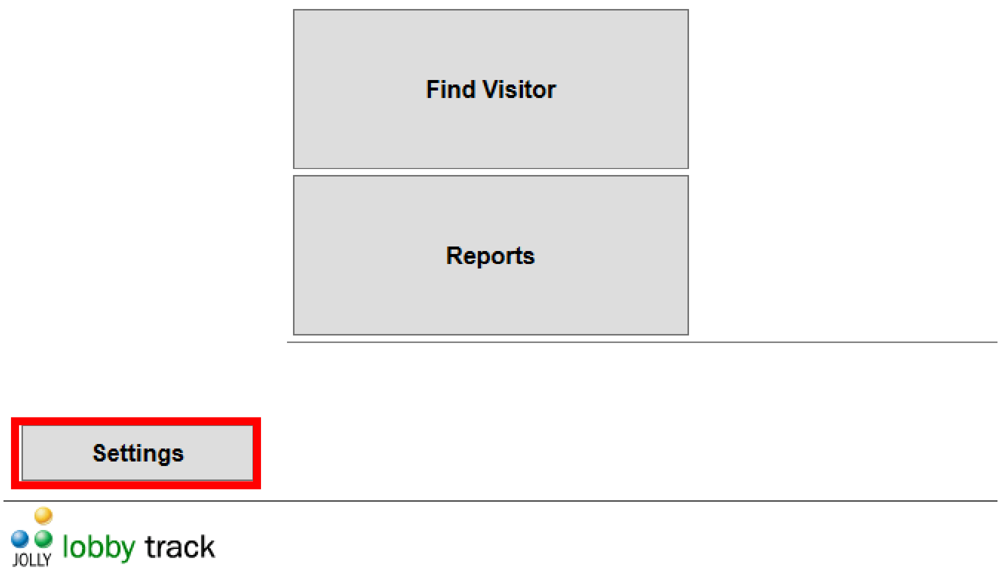
General Configuration

The software offers a full list of optional settings that can be used to tailor the registration and other processes to your own needs. This guide will take a brief tour of each setting offered by the software.

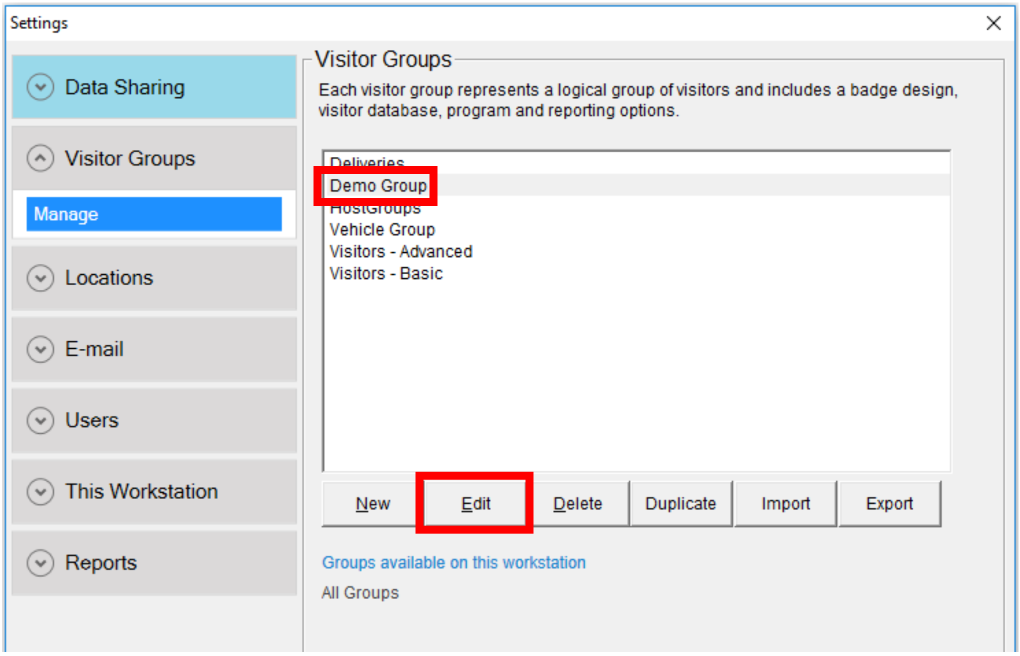
Visitor Group Settings

These are settings that can vary between Visitor Groups allowing for customization per visitor type, facility, etc.

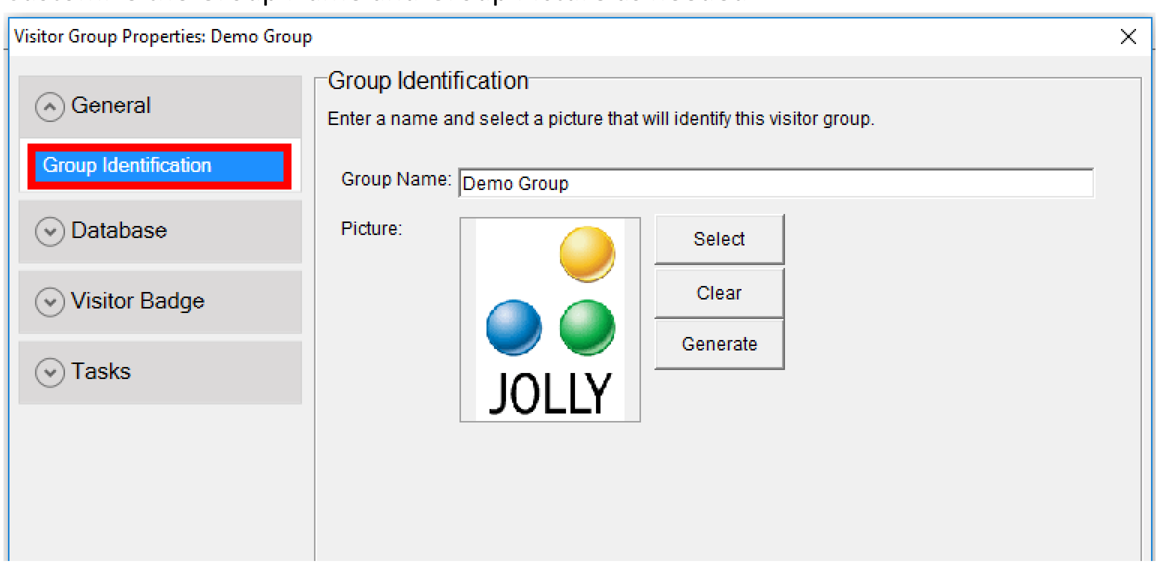
1. Open the software from an administrator account and select the **Settings** button at the bottom left of the main screen:



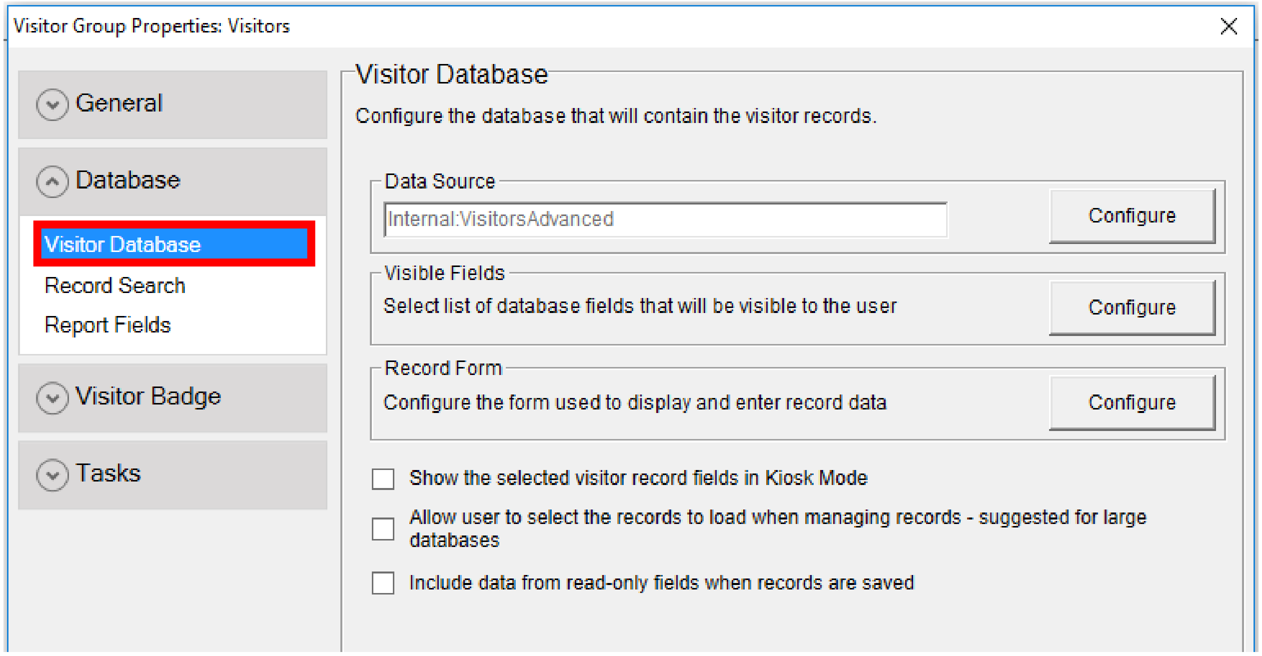
2. Select **New** to add a new Visitor Group. **Edit** allows for an existing group to be configured. Existing groups can also be deleted or duplicated from this screen as well. **Import** and **Export** allow for group settings to be transferred from one installation to another:



3. Select the desired Visitor Group and select **Edit**
4. Customize the Group Name and Group Picture as needed



5. Select **Database** to configure data source, visible fields, and the visitor record form:



Data Source

Data Source is used to connect Lobby Track to a specified visitor database. Depending on the software edition, this can be used to connect to MS Access, Excel, or SQL through an OLE DB or ODBC database connection string.

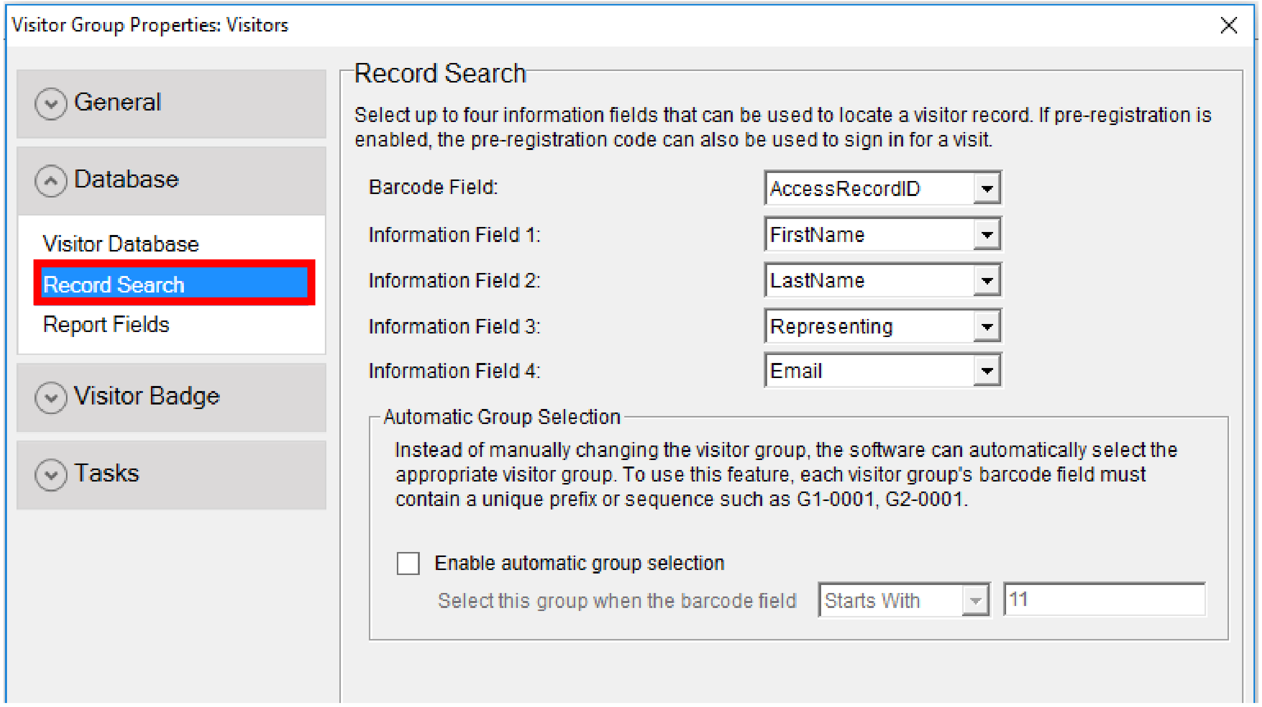
Visible Fields

Visible Fields can be used to specify which database fields should be hidden and which should be visible to users.

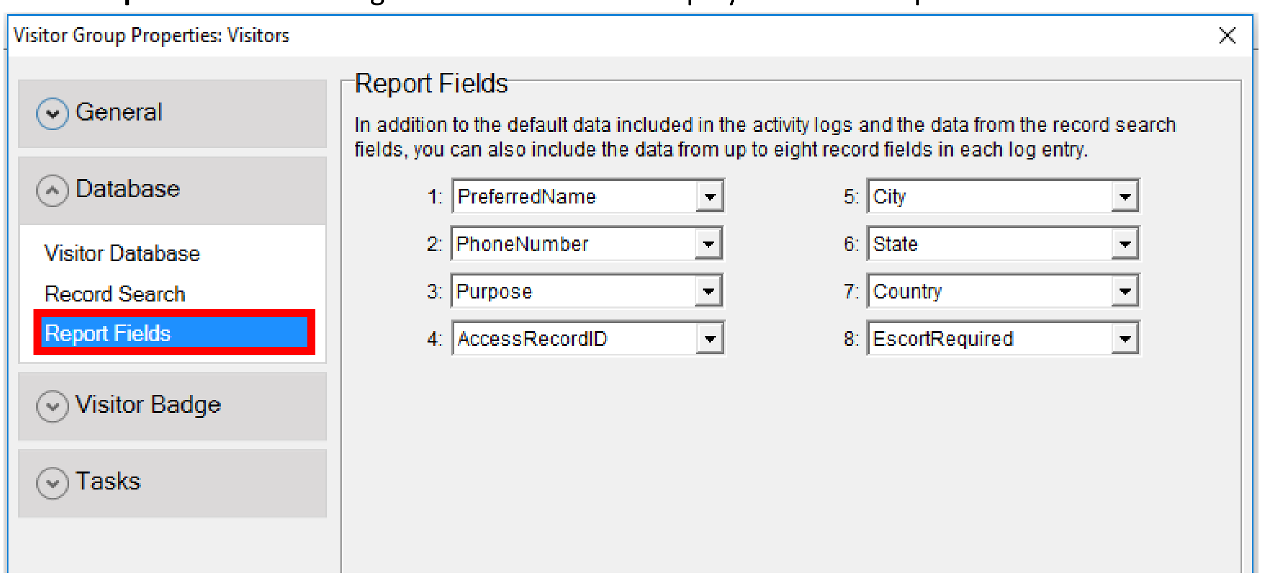
Record Form

Configuring the Record Form allows for customization of the form used to display and enter visitor records. Here, fields can be color coded, formatted, and marked as required and custom drop-down lists can be created and managed. Fields can be rearranged on the Record Form through simple drag-and-drop.

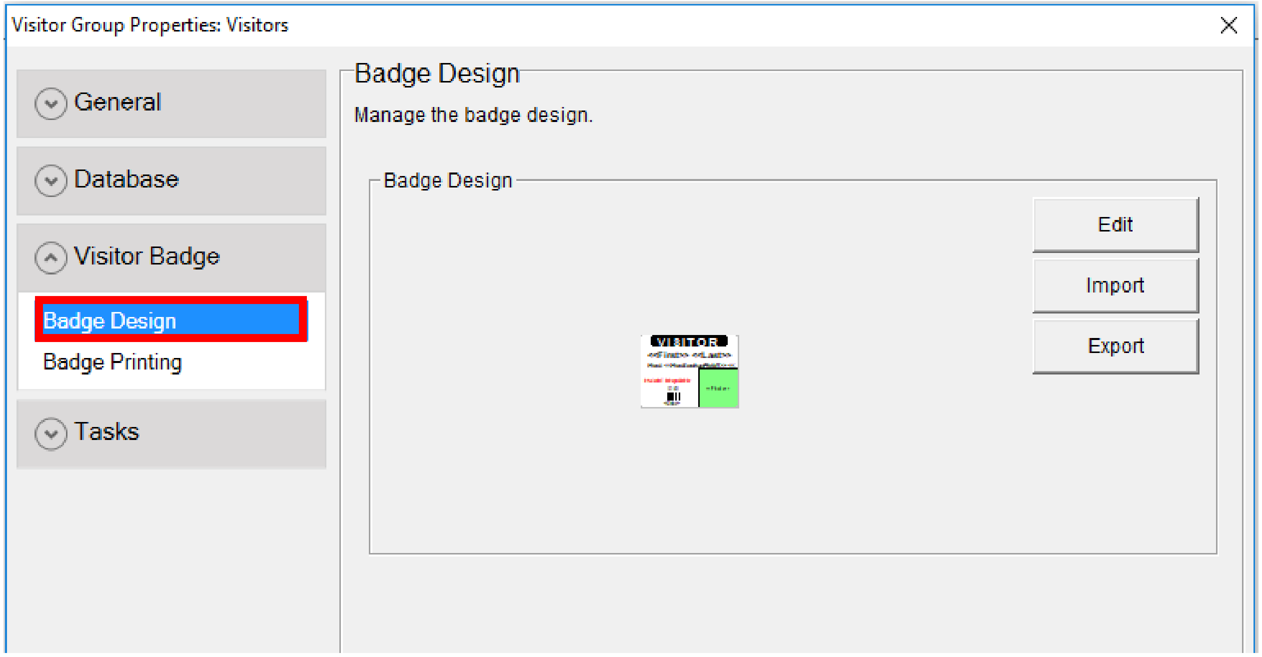
6. Select **Record Search** to configure barcode field and additional visitor search fields. Automatic Group Selection can also be configured here.



7. Select **Report Fields** to configure which fields will display within the reports:



8. Select **Visitor Badge** to configure badge design and printing options:



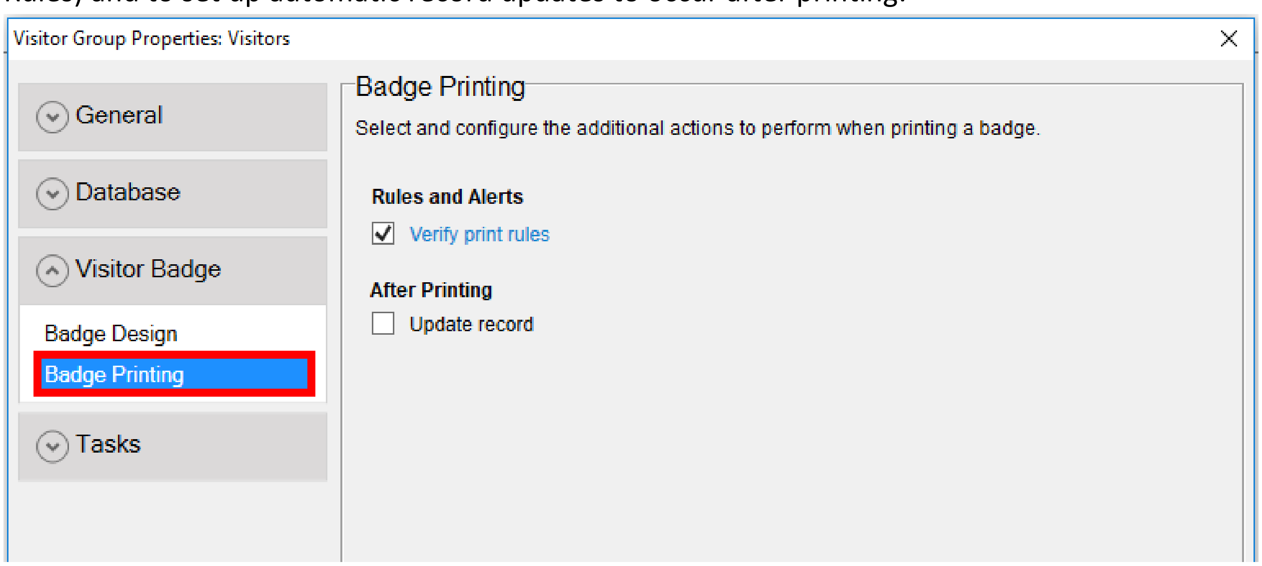
Edit

Select Edit in order to launch the ID Flow designer and configure your ID badge.

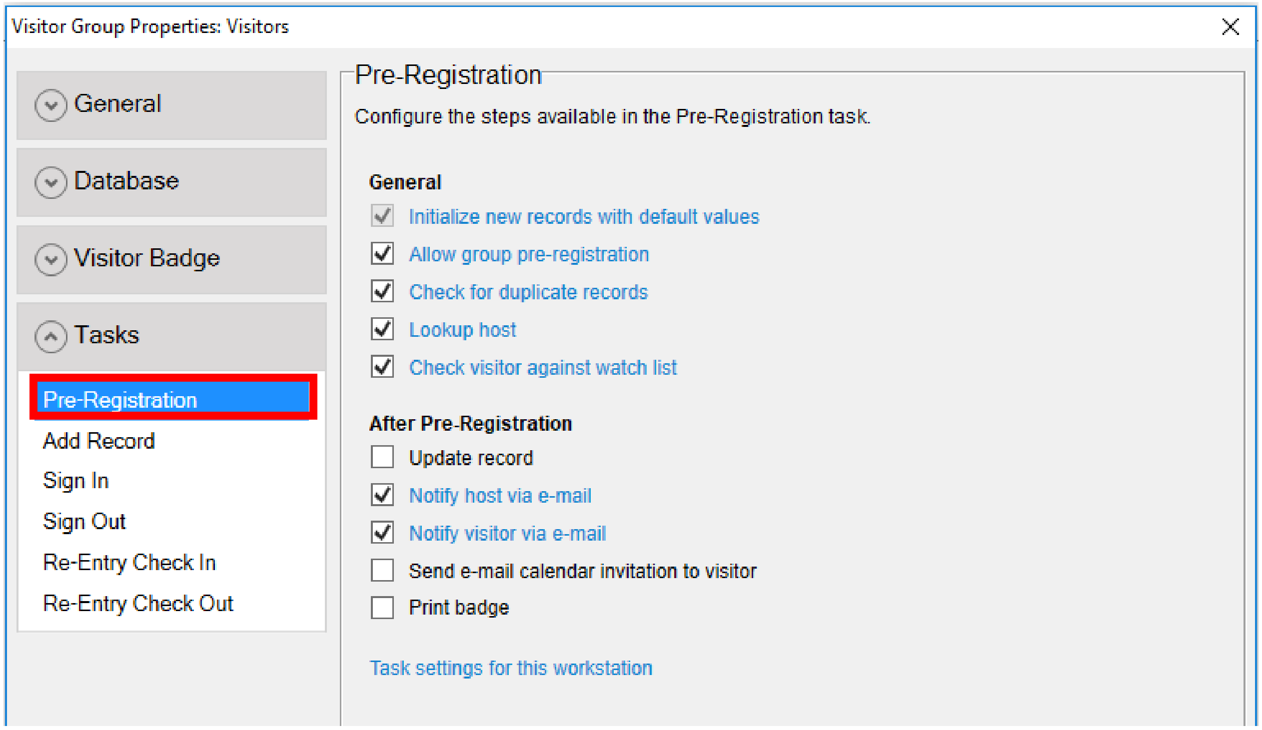
Import/Export

Import and Export allow for the badge template to be saved elsewhere and used in other installations of the software.

9. Select **Badge Printing** to configure printing rules (see guide on Check-in and Printing Rules) and to set up automatic record updates to occur after printing:



10. Select **Tasks** to configure Preregistration, Sign-in, Etc. Note that many of the options are available under multiple tasks. For example, Lookup Host and Watch List are available under both Pre-Registration and Sign In:



Initialize new records with default values

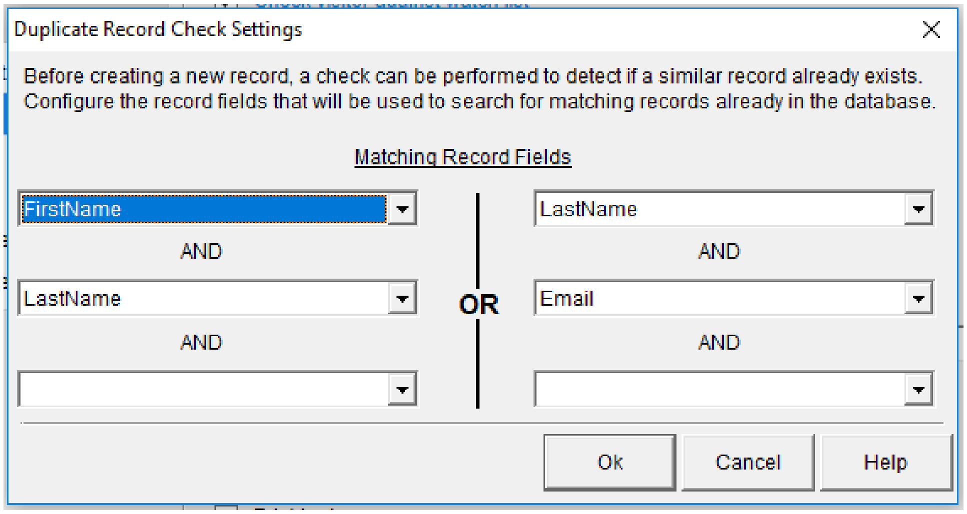
When a new record is added, the record can be automatically populated with default values. Those default values can be configured here.

Allow group pre-registration

When pre-registering a group of visitors, the process can be sped up by entering only the information that changes for each visitor. Here, fields that should be re-entered per group member can be specified. Fields that are not specified will be auto-populated with the data entered for the previous member.

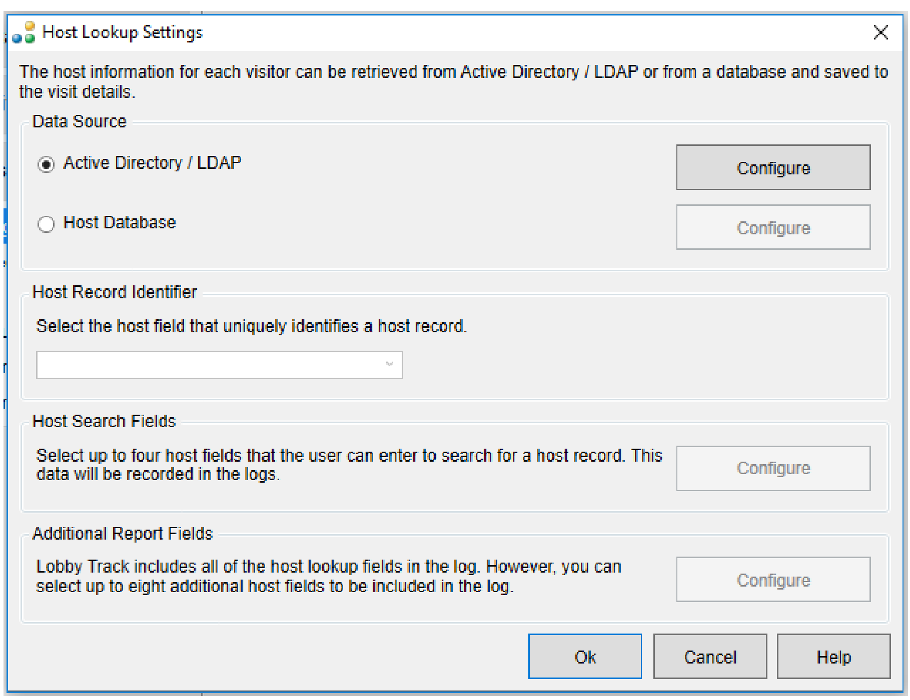
Check for duplicate records

Before creating a new record, a check can be performed to detect if a similar record already exists. Record fields that will be used to search for matching records can be configured here.



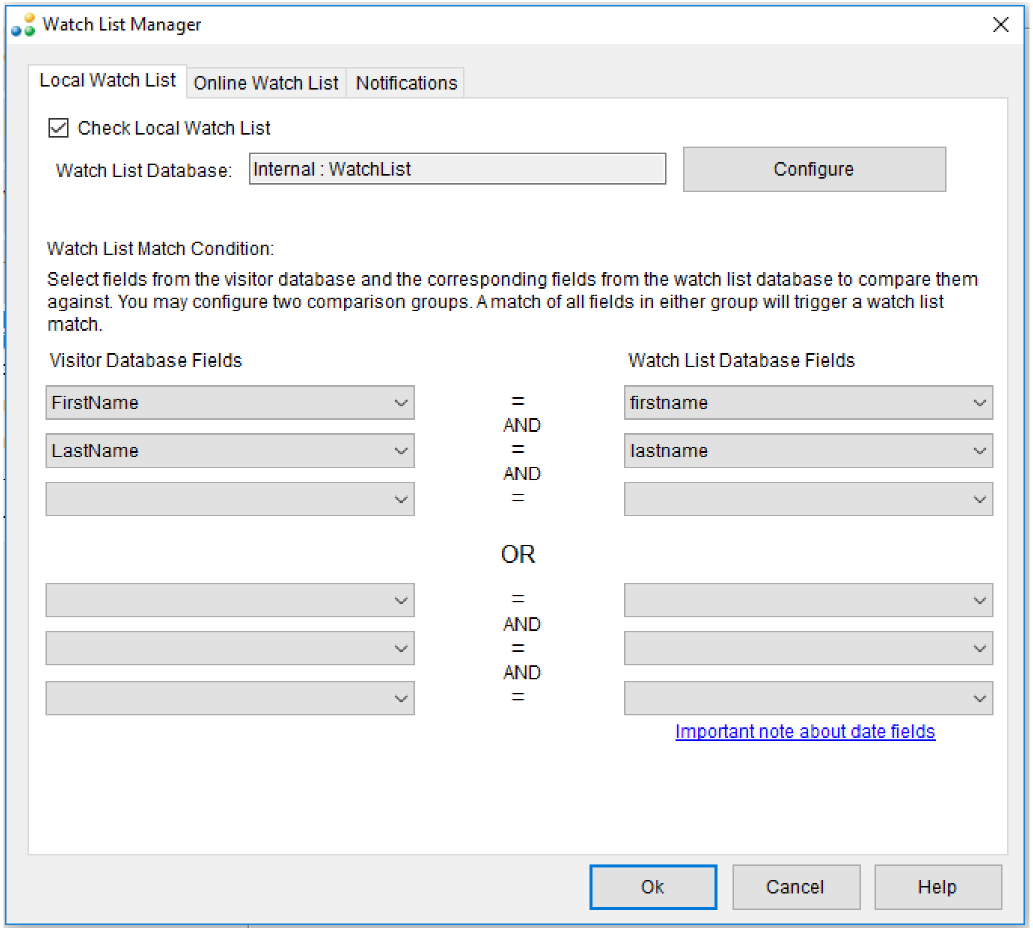
Lookup host

The host information for each visitor can be retrieved from Active Directory/LDAP or from a database and saved to the visit details. Data source, unique host record identifier, host search fields, and additional report fields can be configured here.



Check visitor against watch list

The list can be stored in a private database, an online provider database, or both. Selecting the blue link opens a window to configure settings. Local Watch List settings apply to a custom, private database. Online Watch List settings apply to a connected third-party provider. Notifications can also be configured for email alerts.

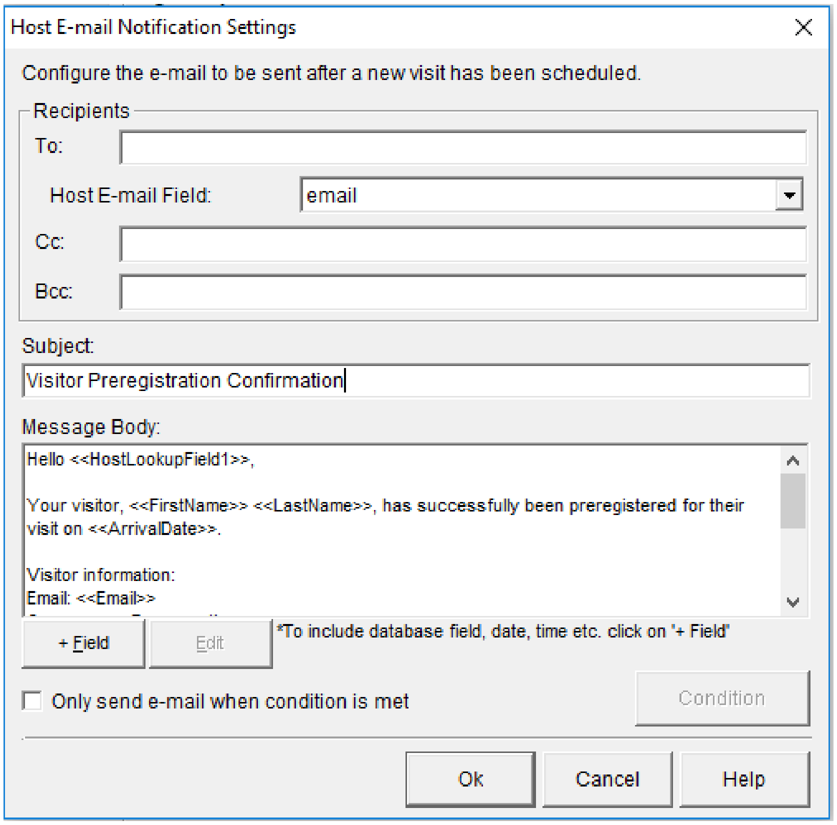


Update record

Record fields can be automatically updated once the pre-registration task has completed. Using the grid, a list of fields to update along with update formulas and values can be specified.

Notify host via e-mail

Here, the e-mail confirmation sent to the visitor's host can be configured with custom text, specified visitor fields, additional recipients, and sending rules.



Notify visitor via e-mail

Here, the e-mail confirmation sent to the visitor can be configured with custom text, specified visitor fields, additional recipients, and sending rules. A barcode can be added to the email to expedite onsite sign in.

Send e-mail calendar invitation to visitor

Configure the e-mail calendar reminder to be sent after a new visit has been scheduled. The start date, end date, and the location for the event will be automatically set based on the visit.

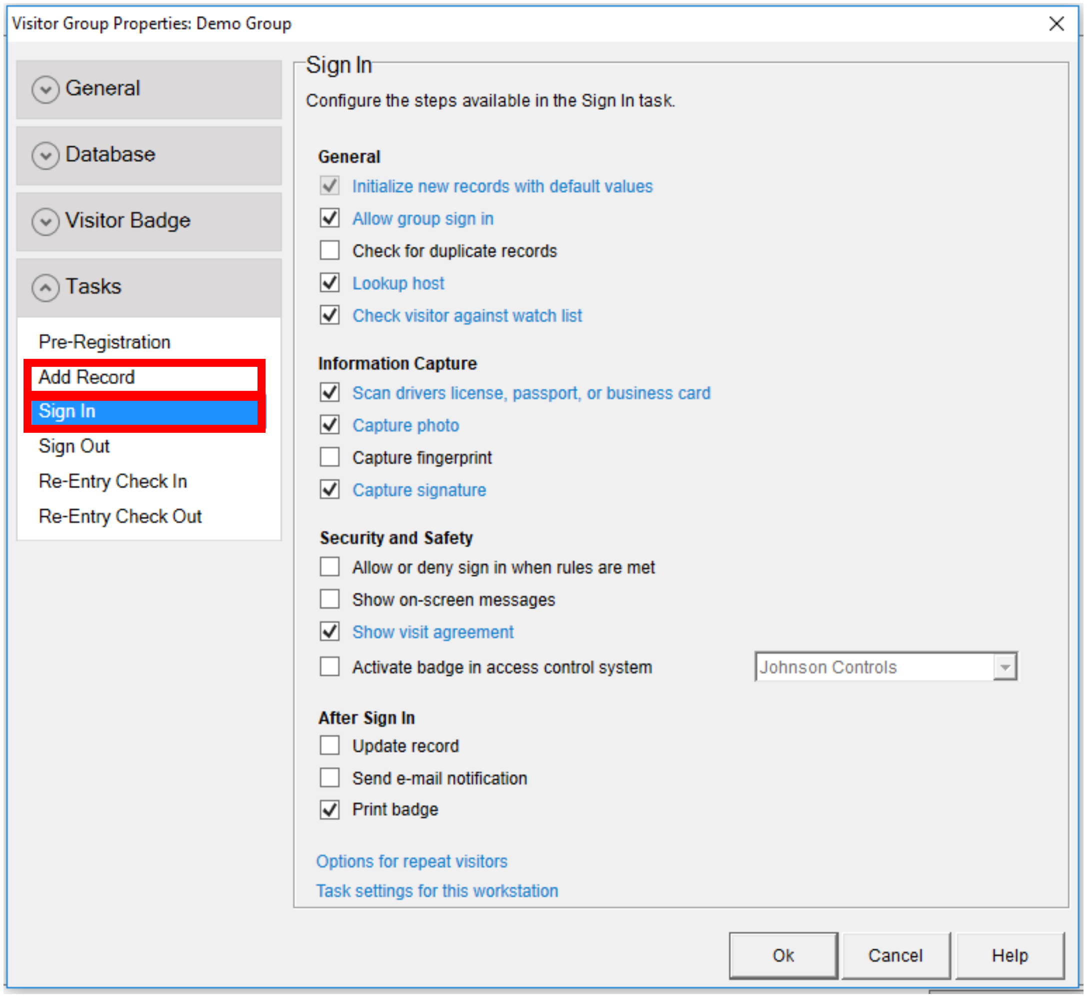
Print badge

Toggle whether or not the badge can be printed at the end of visitor pre-registration.

Task setting for this workstation

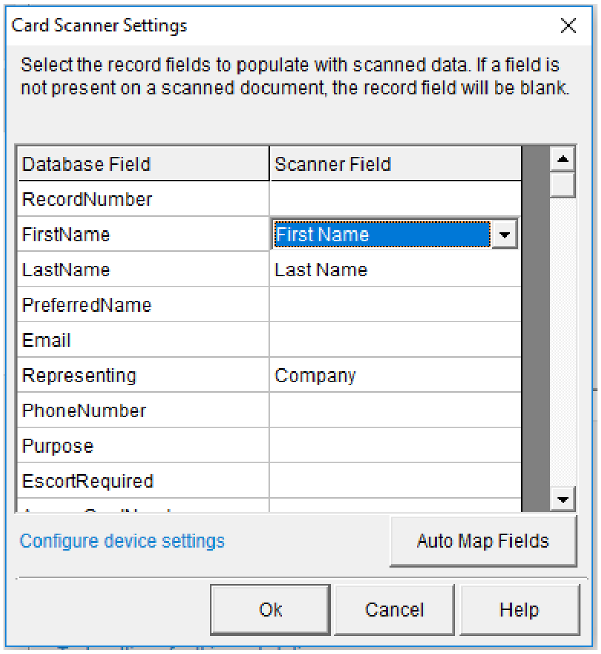
At the end of each of the Visitor Group Property Tasks, you can use 'Task settings for this workstation' to jump to the workstation settings related to the selected task. Workstation settings are described further on in this guide.

11. Select **Add Record** or **Sign In**. Many of the options here are described above. Likewise, Add Record and Sign In share several elements. Add Record is primarily designed for adding employee/student-type records while Sign In is used for visitors:



Scan drivers license, passport, or business card

This option allows the software to collect information from selected media to make the registration process quicker. Selecting the **Auto Map Fields** button will map fields that the scanner is able to read. Occasionally fields may need to be mapped manually depending on the naming structure of the fields.



Note: You should inspect the information collected from driver's licenses and IDs before finishing registration. Scuffs and imperfections on the card can cause incorrect results.

Capture photo

Here, the photo capture option can be configured to save the photo to a specific database field or file location. If saving to a file location, the folder path and file name can be specified.

Capture signature

Here, the signature capture option can be configured to save the signature to a specific database field or file location. If saving to a file location, the folder path and file name can be specified.

Capture fingerprint

Here, the fingerprint capture option can be configured to save the image of the fingerprint to a specific database field or file location. If saving to a file location, the folder path and file name can be specified.

Show on-screen messages

This feature can be used to show on-screen messages during the sign-in process. Multiple messages can be configured with custom rule parameters based on record information, locations, and times.

Show visit agreement

This feature can also be used for any type of agreement, simply change the title and instructions appropriately. You can use database fields to pull information such as names using the +Field button. See the Configure NDA Guide for additional details.

Activate badge in access control system

Use these settings to connect Lobby Track to a supported third-party access control system. Connecting to an access control system will allow Lobby Track to activate and deactivate pre-encoded access control cards which can be used along with physical access control and door locks. See the various access Control Guides for additional details related to supported systems.

Check in (Add Record)

Toggle whether or not check in will take place after a new record is added.

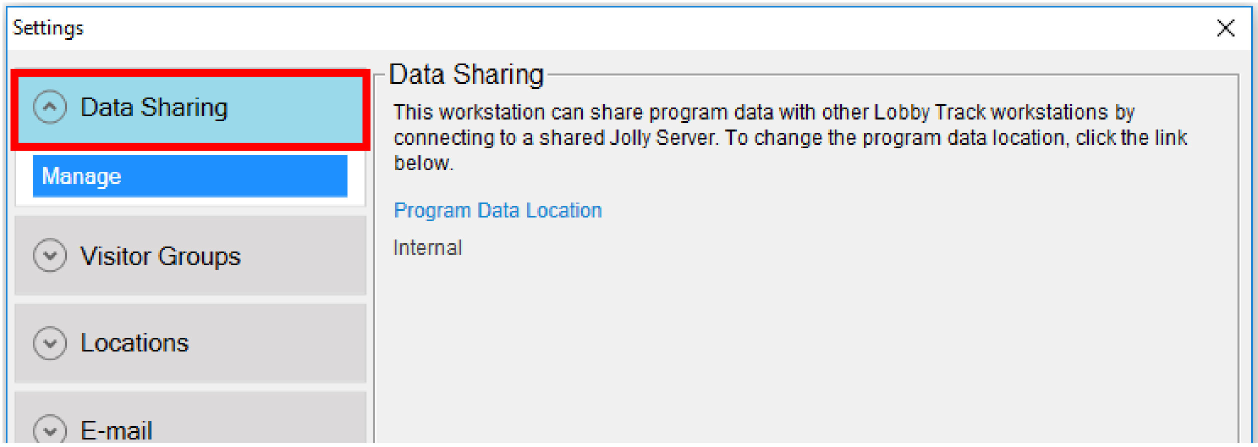
Options for repeat visitors (Sign In)

Several steps can be skipped for visitors who have signed in through Lobby Track previously. Use this option to select any steps that should only be displayed the first time a visitor signs in.

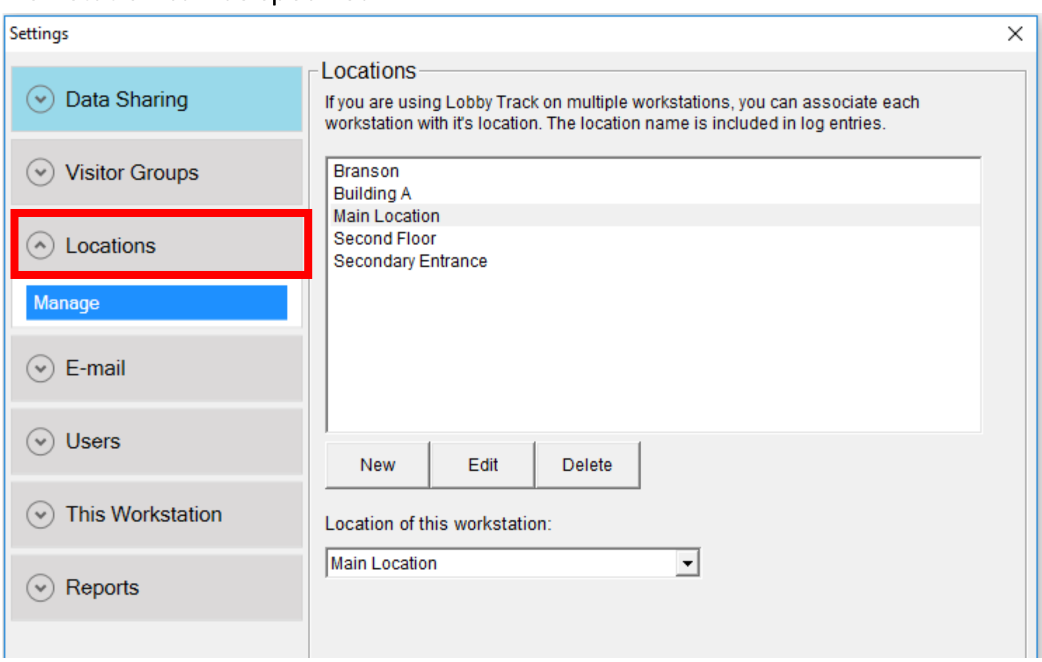
12. The above options apply to **Sign Out**, **Re-Entry Check In**, and **Re-Entry Check Out** in the same fashion as described above. Configure these options as needed. See the' Configure Check in, Check out, and Badge Print Rules' guide for more details.
13. When finished configuring the Visitor Group Settings, select **Ok** to save your changes.

Global and Workstation Settings

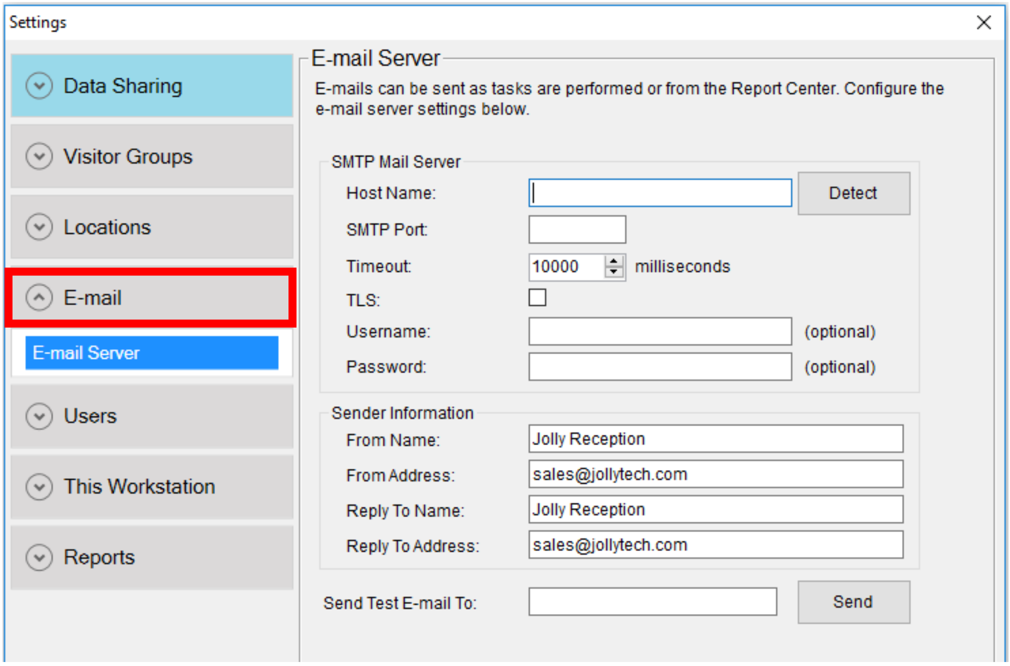
1. From the Settings window, open **Data Sharing**. Configuring the Program Data Location will allow for multiple licenses of Lobby Track to connect to and share a central Jolly Server. See the Jolly Server Guides for additional details.



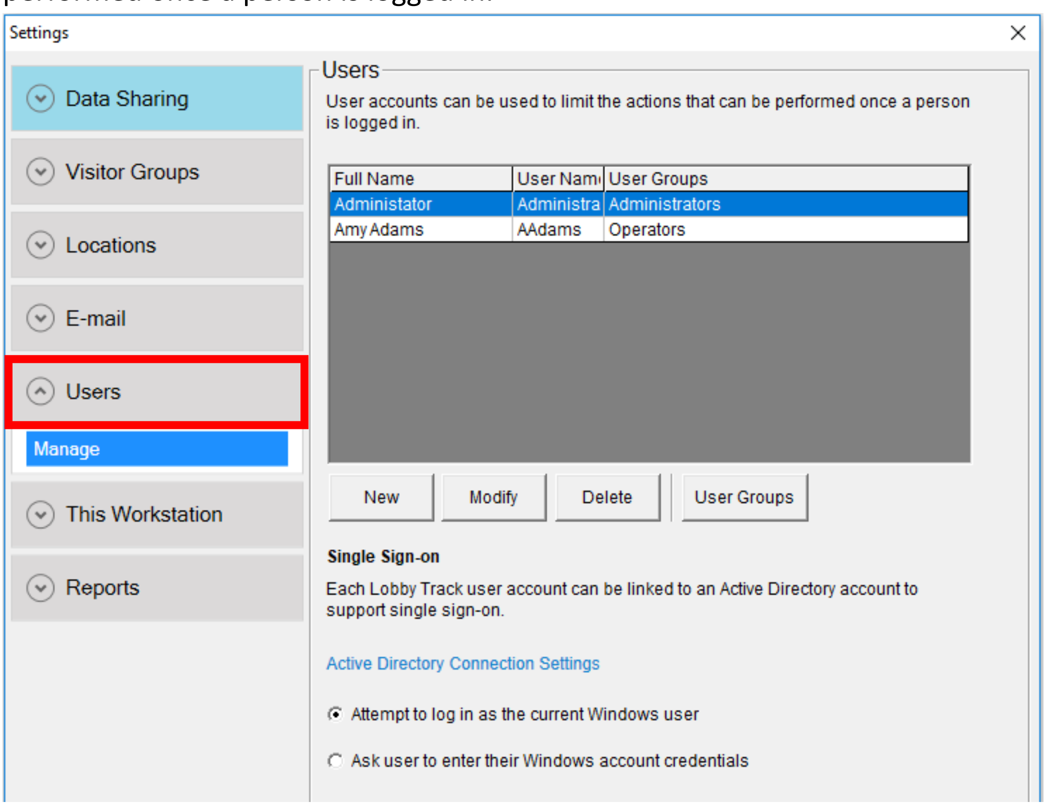
2. Select **Locations**. The 'Locations' category allows you to create and manage "physical" locations for workstations. Once created, locations can be used to filter reports and apply custom check-in/out and printing rules. Here, the location name for the current workstation can be specified.



3. Select **E-mail**. This category allows you to manage e-mail settings used by the software. Any groups that use e-mail notifications will use the provided settings when sending an outgoing e-mail. See your System or Network Administrator for assistance with settings.



4. Select **Users**. User settings and accounts can be used to limit the actions that can be performed once a person is logged in.

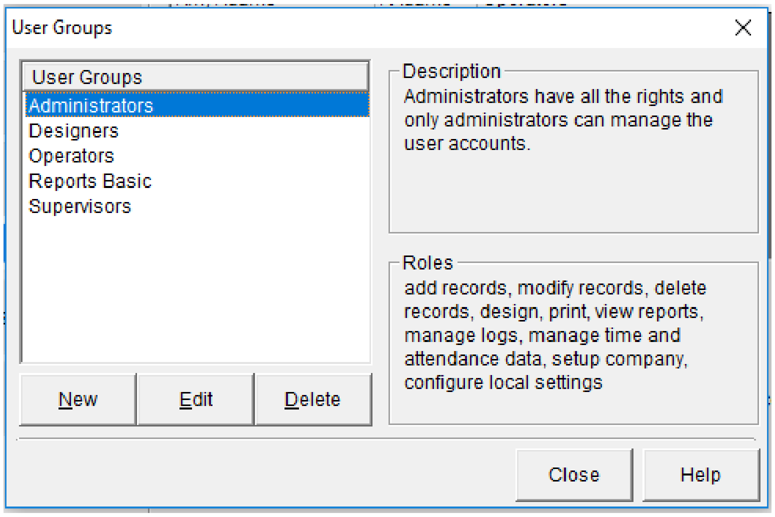


User Accounts

Lobby Track users can be authenticated by providing a password or by using a linked Active Directory or LDAP account.

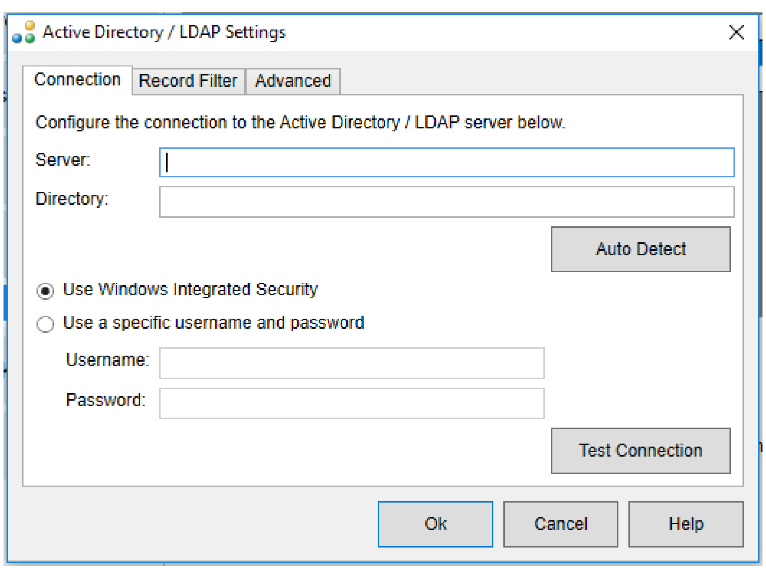
User Groups

User groups allow for the customization of access levels and roles to be provided to specific user accounts. Custom user groups can be added for further control.

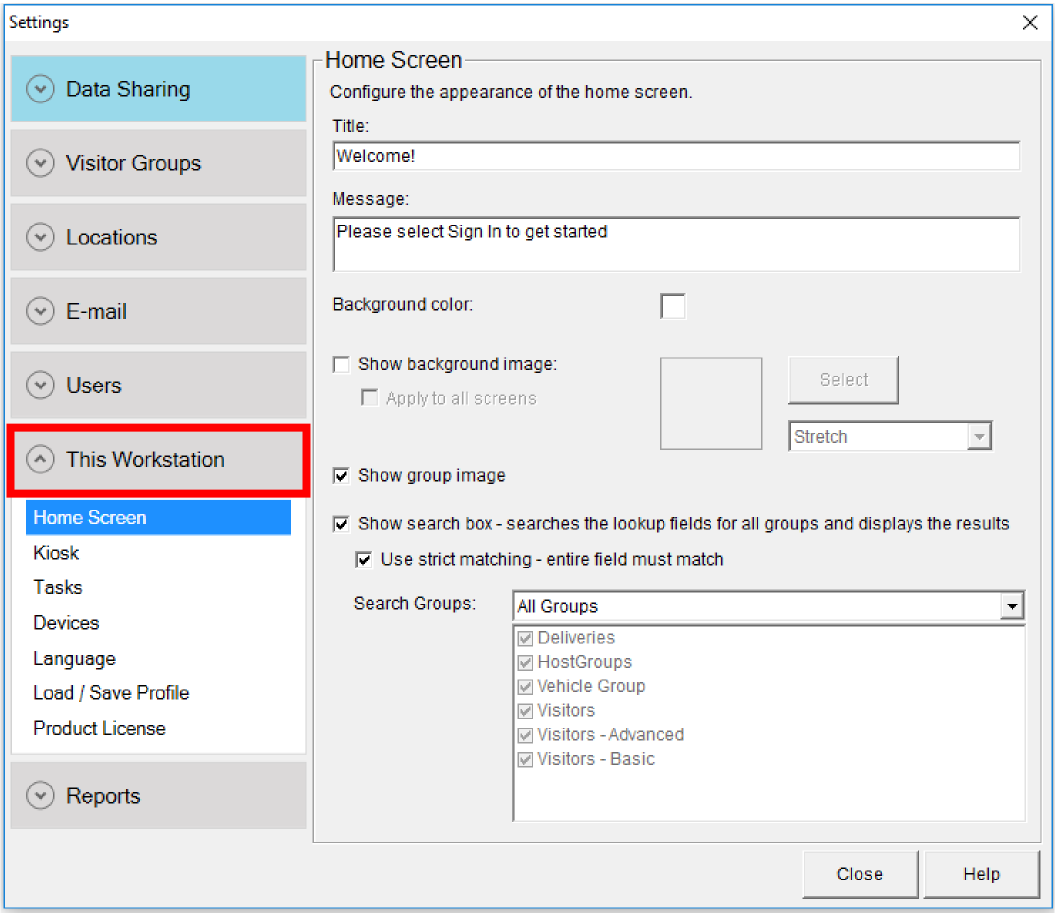


Active Directory Connection Settings

This option will allow users to be logged on via Active Directory to keep passwords synchronized with the user's Windows password. Selecting the **Active Directory Connection Settings** button will open the 'Active Directory / LDAP Settings' window. You may use the 'Auto Detect' button in that window to configure settings however, you may need to see your System or Network Administrator for assistance with these settings.



5. Select **This Workstation**. These are settings that span multiple visitor groups and change behavior throughout the software for the current workstation only.

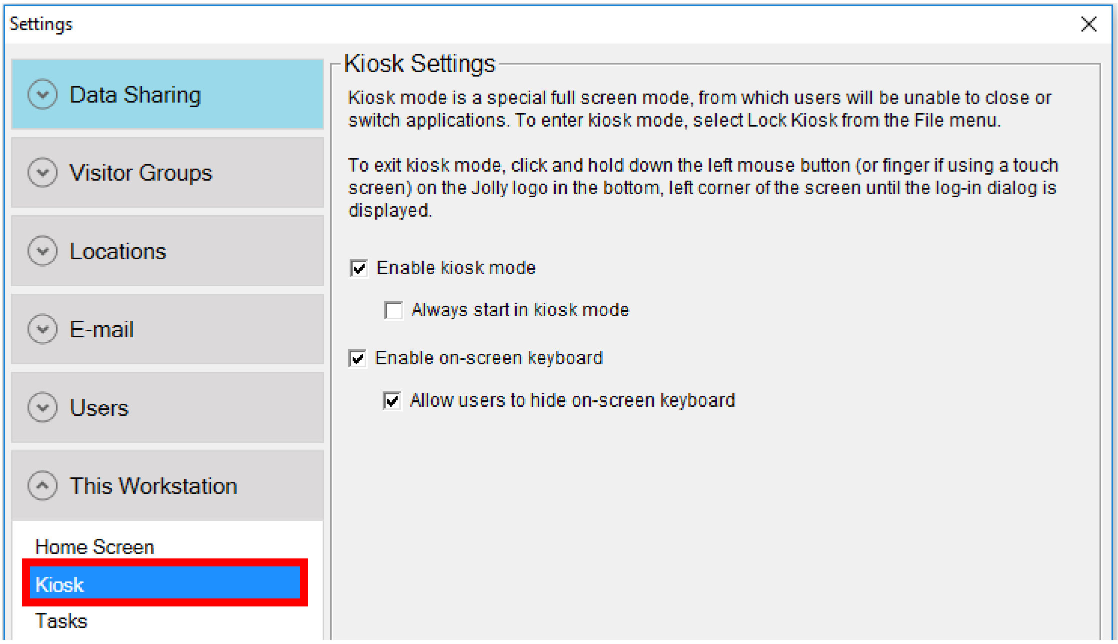


Home Screen

Here, the home screen can be configured with a custom welcome message, background color, background image, and global search function.

Kiosk

General kiosk mode options can be toggled here. If kiosk mode is turned on, users will enter a special, full screen mode that prevents users from closing the software or switching applications. Further steps can be taken within Tasks to further restrict access in a self-serve environment.

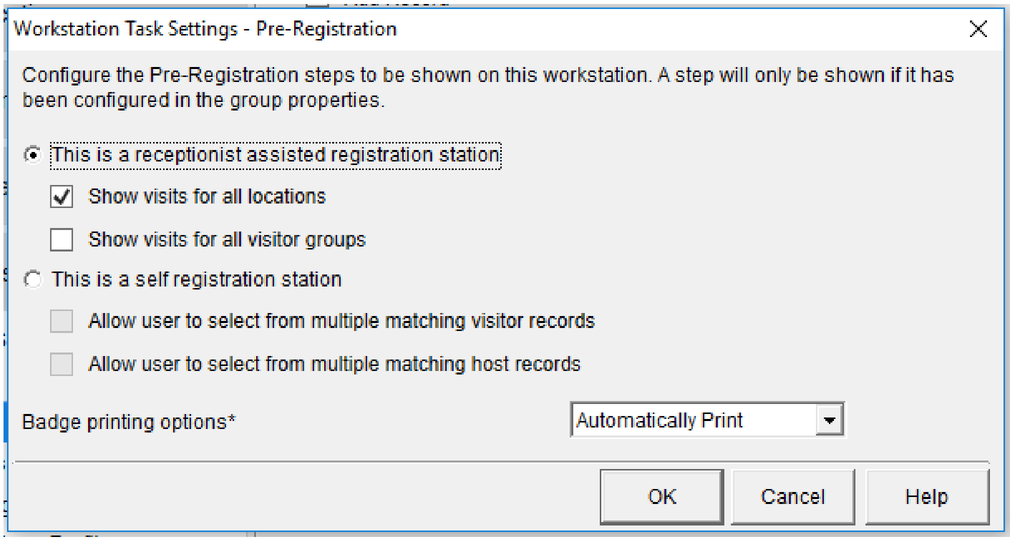


Tasks

Workstation tasks are additional configuration options that can apply to a specific workstation. Tasks can be toggled on and off here, removing them from the main screen.

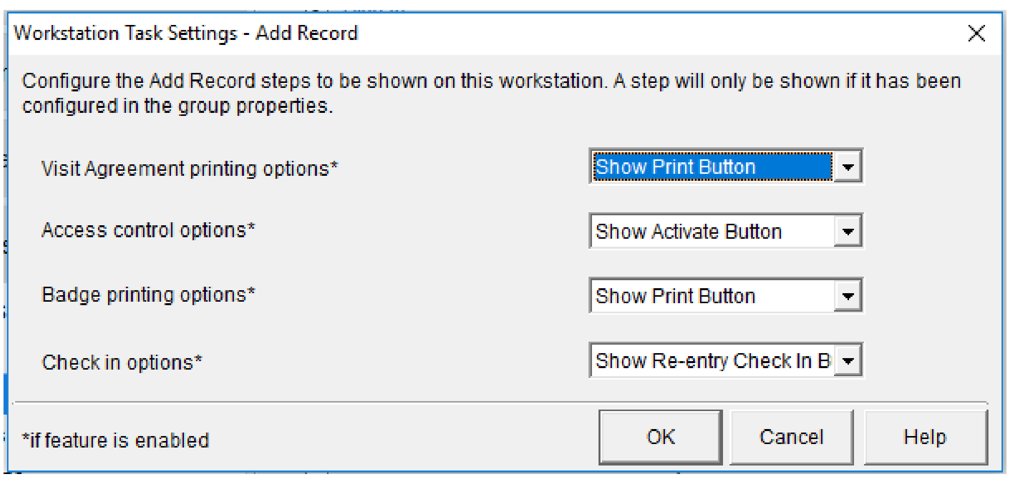
Pre-Registration

Use the Pre-Registration workstation settings to configure the display of the pre-registration task. Selecting ‘This is a receptionist assisted registration station’ will display the full preregistration list and allow users to openly search for visitor records and hosts. Selecting ‘This is a self-registration station’ will allow for the restriction of visitor and host searches.



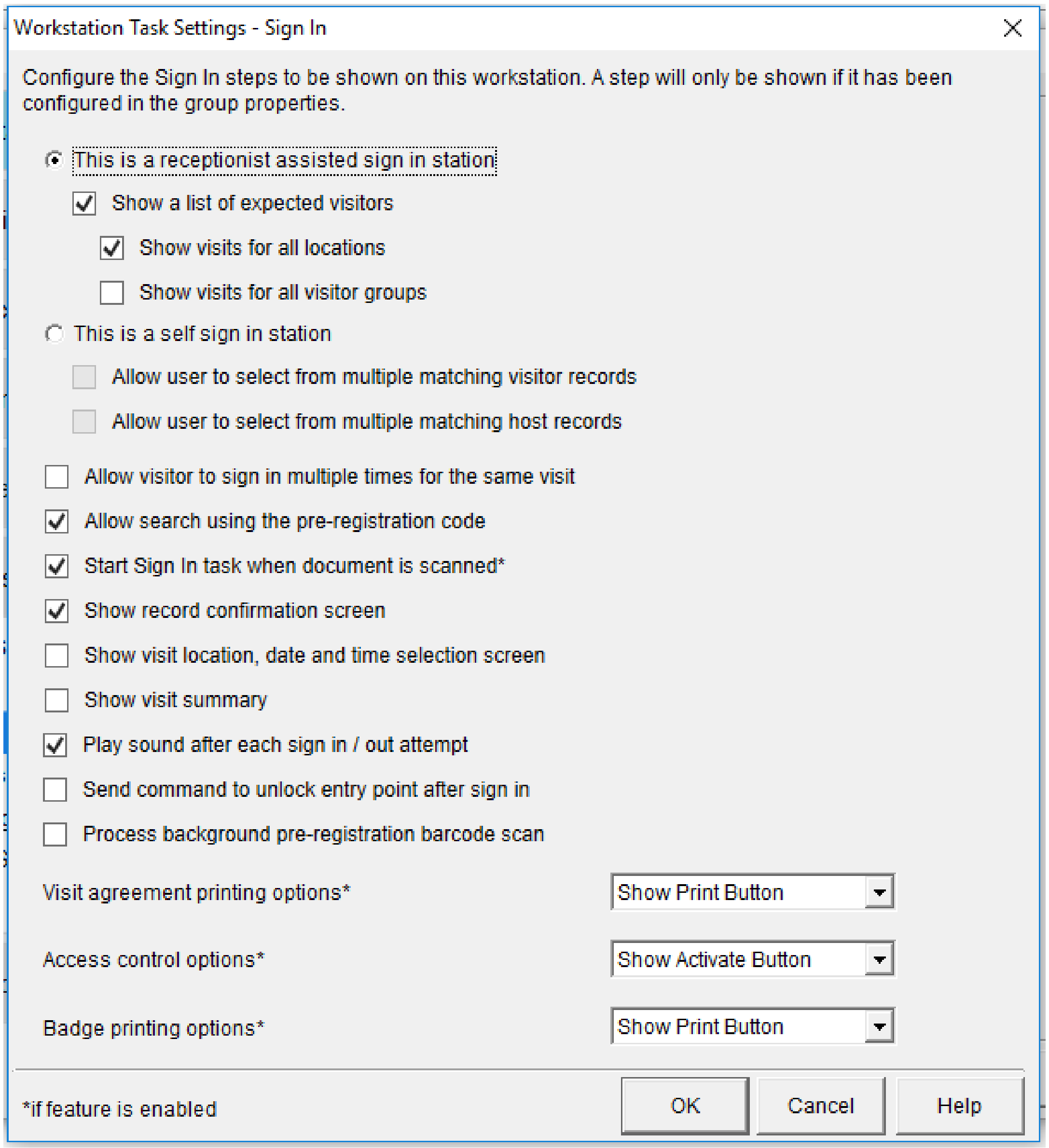
Add Record

Workstation options for the Add Record task allow for configuration of automatic printing and check-in upon adding a new record.



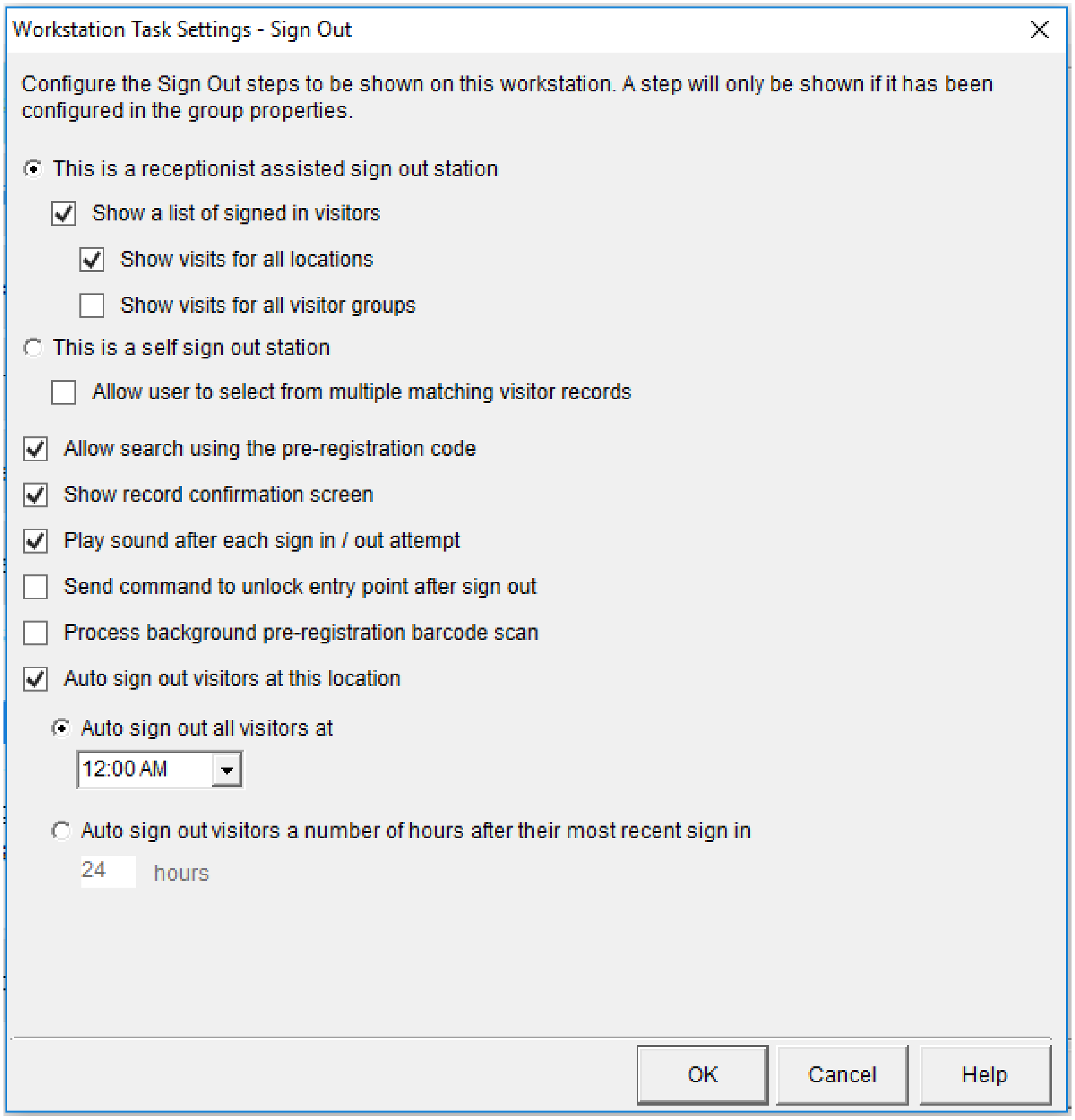
Sign In

Workstation options for the Sign In task allow for further self-serve customization, including the ability to hide the pre-registration list and to restrict the visitor's searching capabilities. Further options include license scanning from the main screen, playing a sound when the sign in takes place or fails, sending commands through a relay to unlock a gate/door, and automatic printing of NDAs and badges.



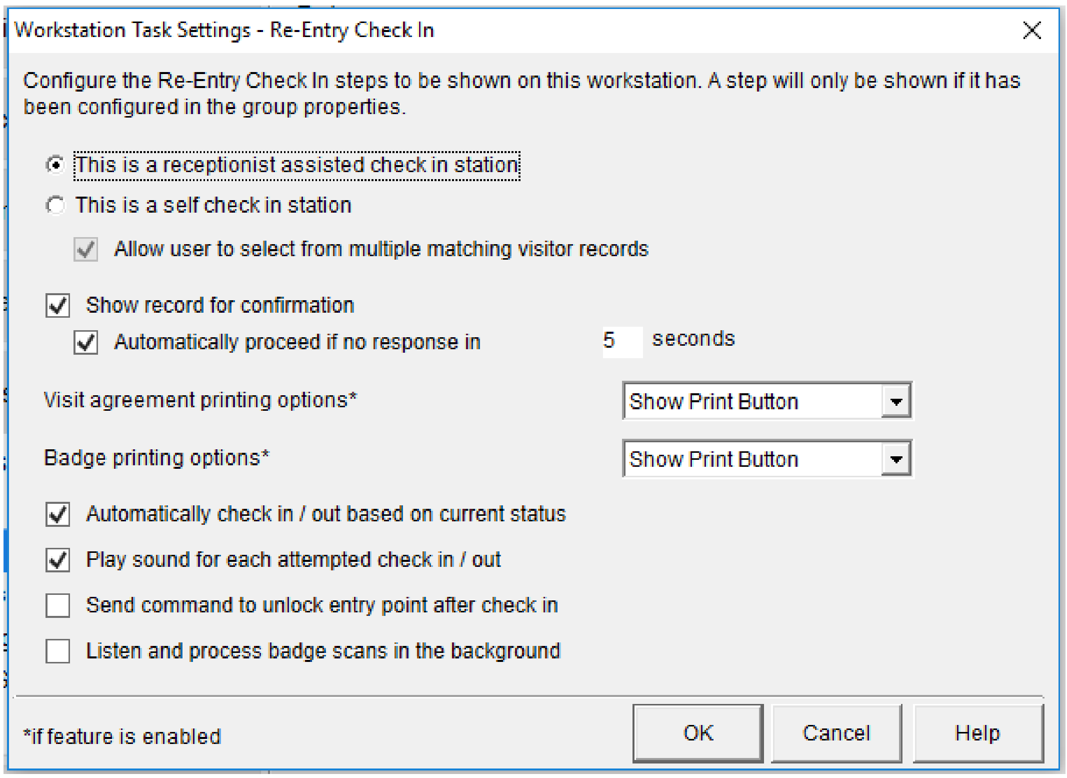
Sign Out

Workstation options for the Sign Out task allow for further self-serve customization, including the ability to hide the list of all those who are currently signed in and to restrict the visitor's searching capabilities. Further options include playing a sound when the sign out takes place or fails, sending commands through a relay to unlock a gate/door, and automatically signing visitors out at a specific time or after a specified number of hours.



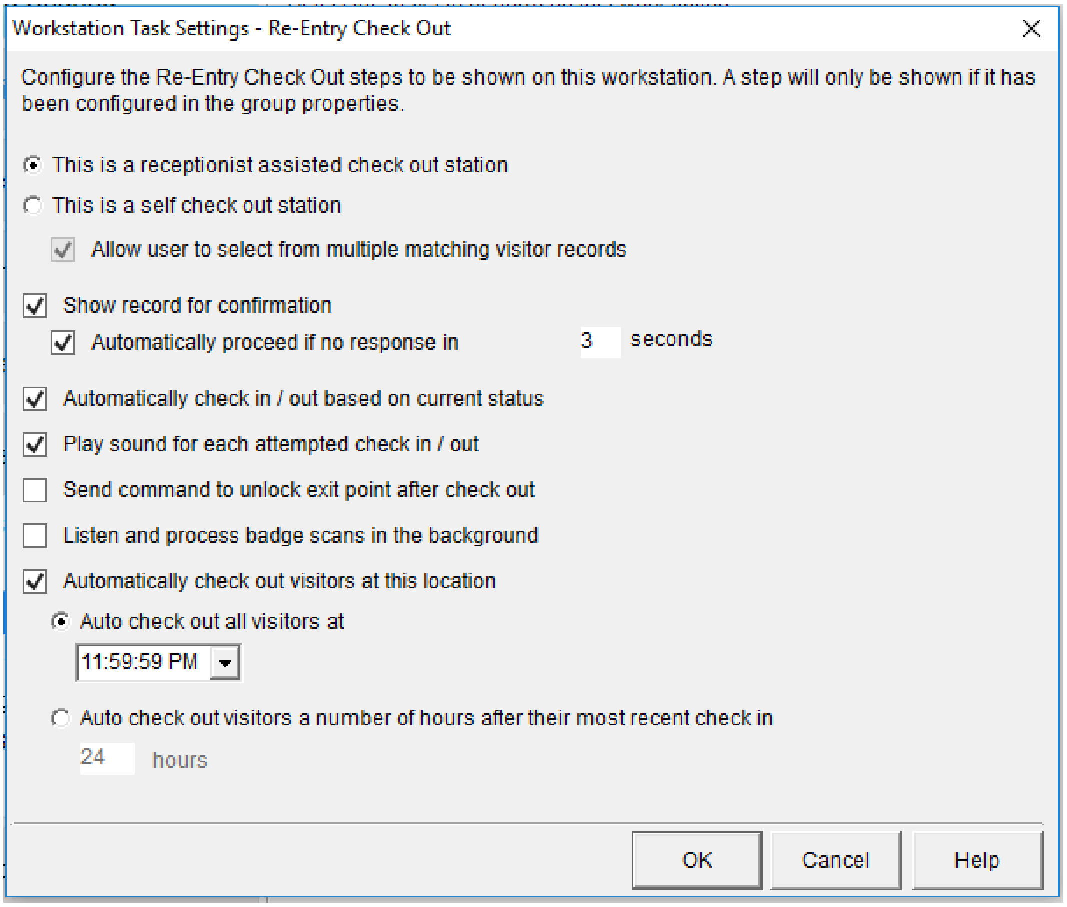
Re-Entry Check In

Workstation options for the Re-Entry Check In task allow for further self-serve customization, including the ability to restrict the visitor's searching capabilities. Further options include record confirmation display settings, playing a sound when check-in takes place or fails, sending commands through a relay to unlock a gate/door, automatic check-in/out based on current status, and background scanning (see Background Scanning Guide for additional details).



Re-Entry Check Out

Workstation options for the Re-Entry Check Out task allow for further self-serve customization, including the ability to restrict the visitor's searching capabilities. Further options include record confirmation display settings, playing a sound when check-out takes place or fails, sending commands through a relay to unlock a gate/door, automatic check-in/out based on current status, background scanning (see Background Scanning Guide for additional details), and automatically checking out all visitors at a specific time or after a specified number of hours.



Visit List

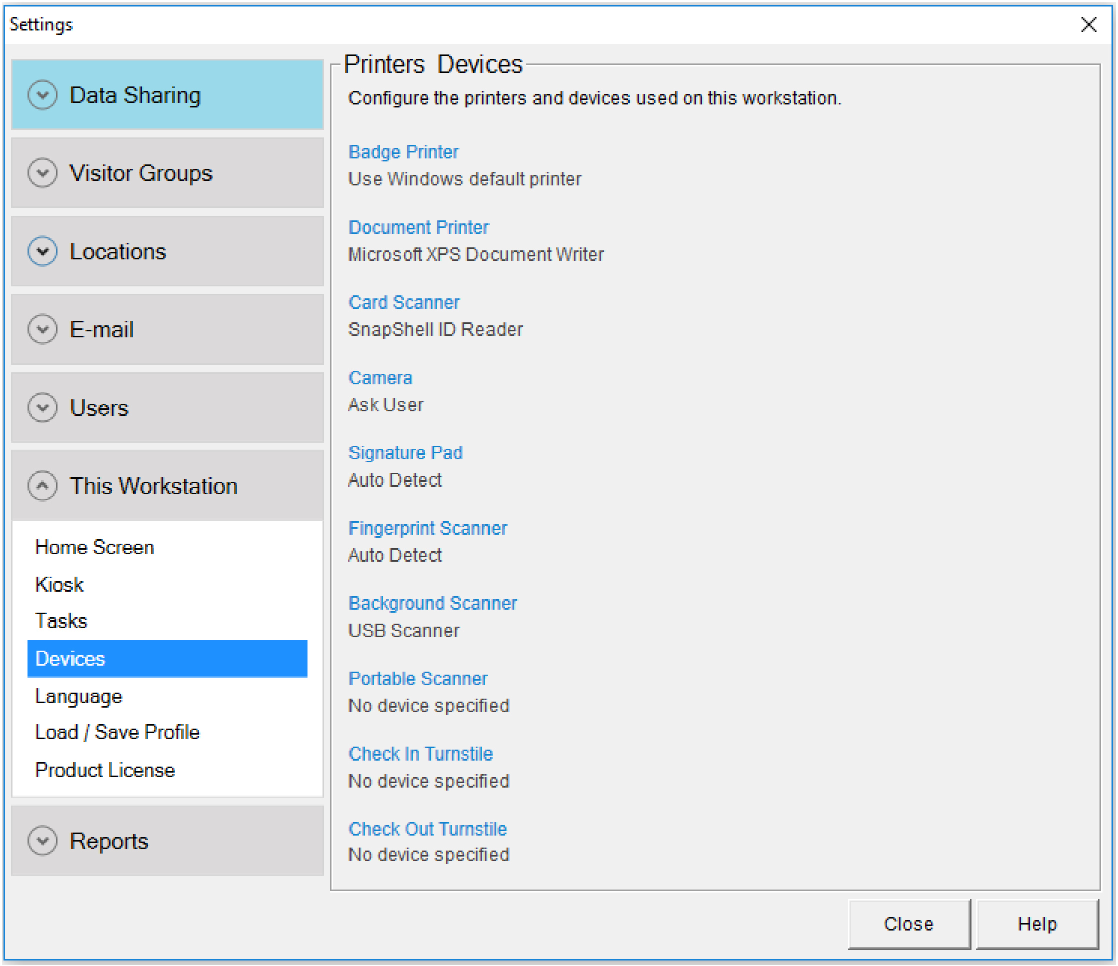
Toggle the Visit List on/off and select options for displaying visitors from all groups/locations.

Manage Records

Toggle Manage Records on/off and select which records can be displayed on this workstation.

Devices

Printers and other devices used on this workstation can be configured here.



Badge Printer

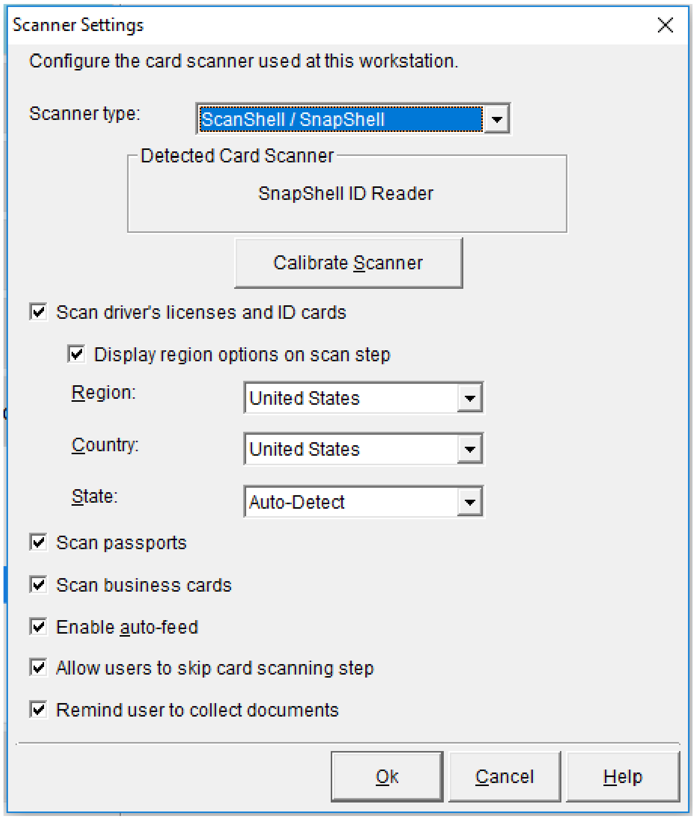
Configure badge printer settings including the print dialogue display and default printers.

Document Printer

Configure document printer settings including the print dialogue display and default printers.

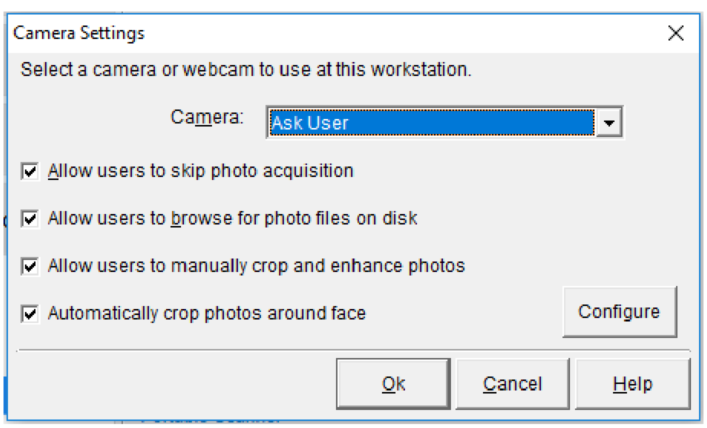
Card Scanner

Configure driver's license, passport, and business card scanning settings including scanner calibration and display options.

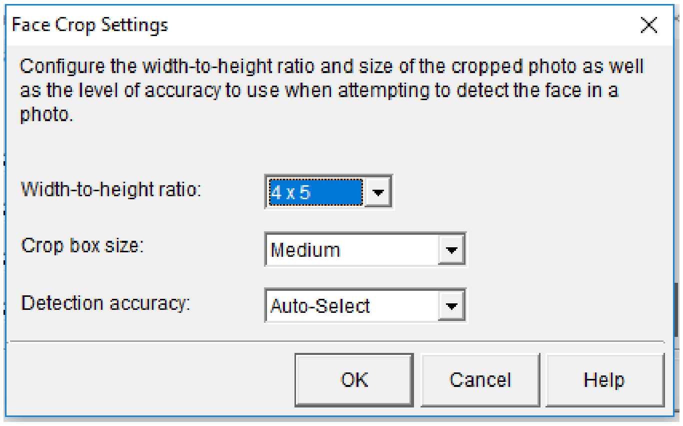


Camera

Configure camera settings including the default camera, the ability to browse for an image, the ability to edit photos, and automatic face detection and image cropping.

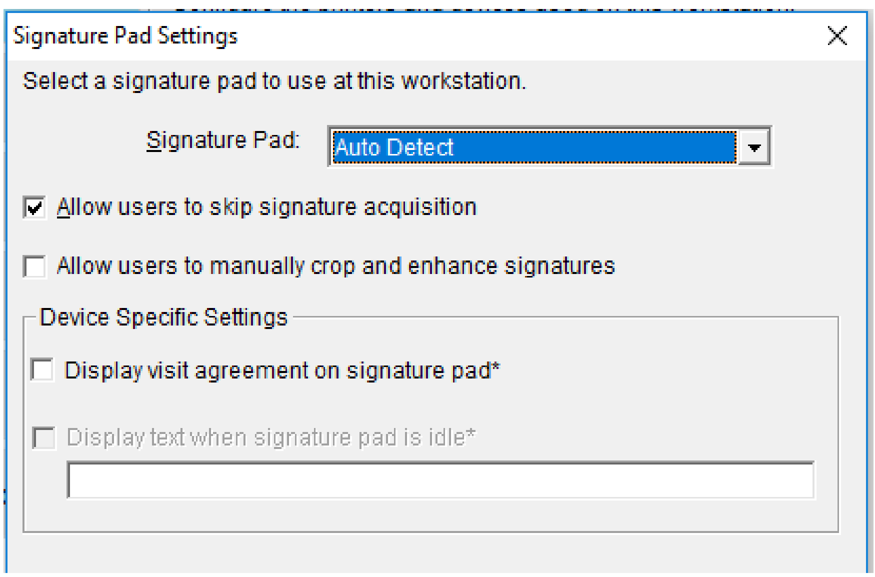


Face Crop Settings allows for the captured photo to be automatically cropped to a specified ratio when the photo is captured.



Signature Pad

Configure the signature pad settings including the default device, the ability to edit signatures, and the ability to display the agreement on a Topaz signature pad with agreement display capabilities.



Fingerprint Scanner

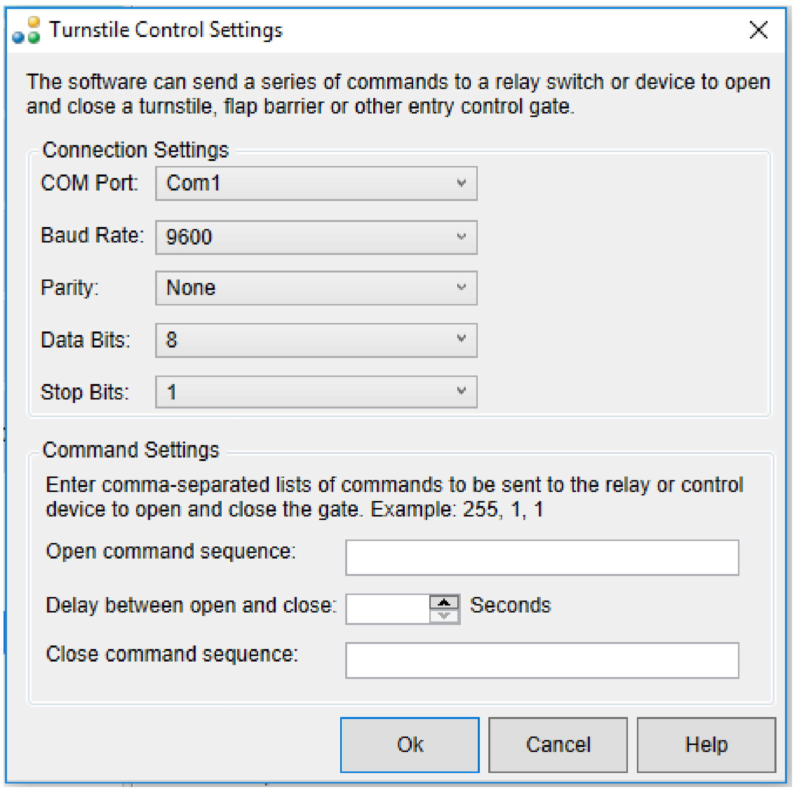
Configure the fingerprint scanner settings including the default device and the ability to edit the captured fingerprint image.

Background Scanner

Configure background scanning to take place without interfering with visitor sign in or if the software is minimized. See the Background Scanning Guide for more details.

Portable Scanner
Using a compatible batch scanner, such as the Opticon 2001, multiple record IDs can be loaded to populate the check-in or check-out reports. Options for batch scanners and file upload can be configured here.

Check In Turnstile
Lobby Track can send a series of commands to a relay switch or device to open and close a turnstile, flap barrier, or other entry gate. Settings related specifically to check in can be configured here.



Check Out Turnstile
Lobby Track can send a series of commands to a relay switch or device to open and close a turnstile, flap barrier, or other entry gate. Settings related specifically to check out can be configured here.

Language
The main language display can be selected and applied to the workstation. Language options include English (default), German, Spanish, and Other. The 'Other' selection can be customized with a specified system font, display direction, and translation text.

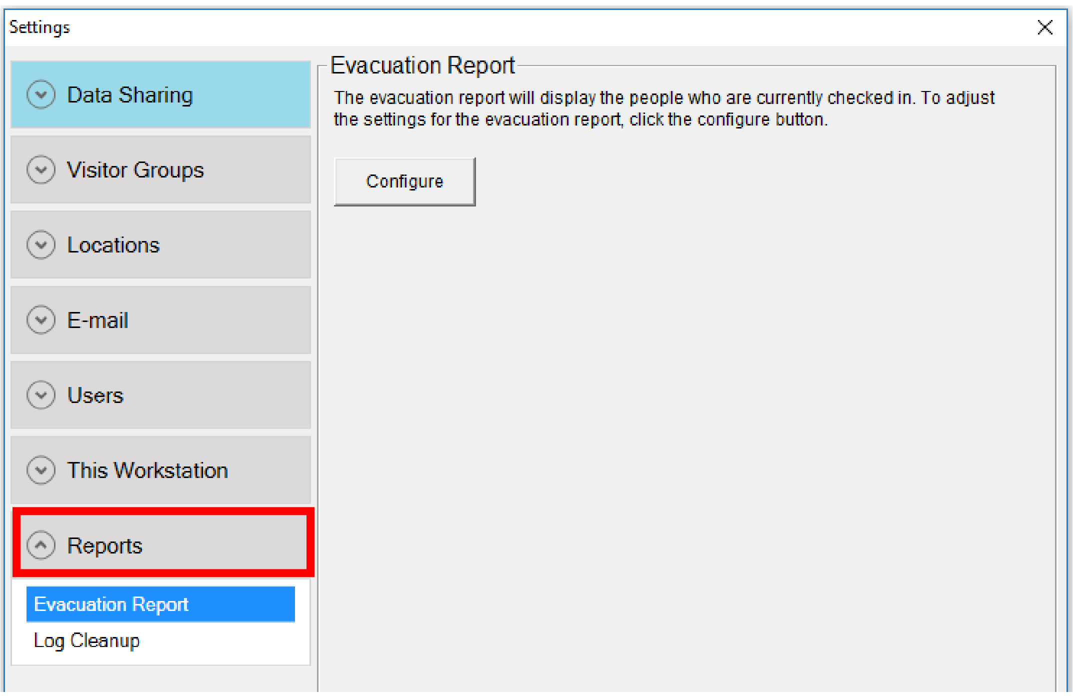
Load/Save Profile

The current workstation options can be saved as a profile and loaded on other Lobby Track installations for easy duplication of workstation settings.

Product License

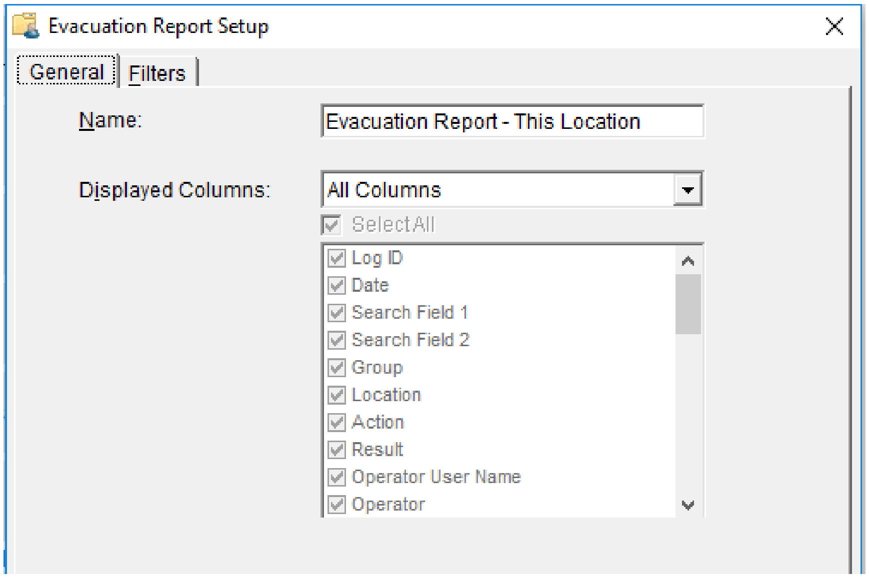
The current product license is displayed here along with a link to the End User License Agreement. Licenses can be deactivated and transferred from this area as well. Please see the Deactivation Guide for more information.

6. Select **Reports**. This category allows for the customization of the Evacuation Report and automatic log deletion.



Evacuation Report

The evacuation report displays a list of everyone who is currently signed in. Using the configuration options provided, the evacuation report can be named, fields can be hidden, and the report can be filtered by Visitor Group(s) and Location(s)



Log Cleanup

By default, logs are kept within Lobby Track indefinitely. Using the log cleanup settings, logs can automatically be deleted after a set number of days or restricted to a maximum number of logs.