LobbyWorks Release 4.0

Administrator's Installation and Configuration Guide

Honeywell

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PART A - INSTALLATION

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Chapter 1 Introduction

Chapter 2 Installing LobbyWorks 4.0

Chapter 3 Installing External Devices

Chapter 4 Configuring IIS for Web Center

Chapter 5 Modifying LobbyWorks 4.0

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Chapter 20 External Devices

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About this Guide

Scope

This guide describes how to install the LobbyWorks 4.0 suite of applications. In addition it provides information on how to use the LobbyWorks Administrator to configure the Visitor Management System (VMS) and the other applications in the LobbyWorks suite.

Intended Audience

This guide is intended for the administrator of the LobbyWorks suite of applications.

Prerequisite Knowledge

The LobbyWorks Administrator is required to have a knowledge of the following:

- Basic Knowledge of a Visitor management system(VMS)
- How to use computers, printers, and phones
- Basic Database Management and Networking skills

Document Structure

The guide is divided into two parts - Part A and Part B.

Part A contains information about how to install the LobbyWorks 4.0 suite of applications (Administrator, Front Desk, Database, Kiosk, Web Center, Adapter, Reporter, Scheduler, and Badge Preprint) and the external peripheral devices which can be used with the application.

Part B contains information on how to use the Administrator application to configure the Visitor Management System and the other LobbyWorks applications such as the Front Desk and the Kiosk.

Symbol Definition

The following table lists the symbols used in this document to denote certain conditions:

Symbol	Definition
	**Note:** Identifies information that requires special consideration.
	Example: Identifies an example that complies with the concept.
	**Tip:** Identifies advice or hints for the user, often in terms of performing a task.

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Part A

Installation

A List of all the chapters in Part A

Chapter	Explains...
Chapter 1,Introduction	The LobbyWorks 4.0 Visitor Management System (VMS).
Chapter 2, Installing LobbyWorks 4.0	How to install LobbyWorks 4.0.
Chapter 3, Installing External Devices	How to install the external devices.
Chapter 4, Modifying LobbyWorks 4.0	How to modify LobbyWorks installation.
Chapter 5,Removing LobbyWorks 4.0	How to remove LobbyWorks 4.0
Chapter 6, Troubleshooting	How to troubleshoot the LobbyWorks Installation.
Chapter 7, Installing Notify	How to install the Notify application

Introduction

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In this chapter...

Overview

LobbyWorks is a Visitor Management System (VMS) that provides solutions for the automation of tasks related to registering and tracking visitors, and employees or hosts.

The LobbyWorks software suite contains the following applications:

- LobbyWorks Administrator
- LobbyWorks Front Desk
- LobbyWorks Kiosk
- LobbyWorks Web Center
- LobbyWorks Notify
- LobbyWorks Badge Preprint
- LobbyWorks Reporter
- LobbyWorks Scheduler
- LobbyWorks Adapter

This guide describes the steps for installing LobbyWorks on your computer.

Prerequisites

Ensure that you logon to the Windows using administrator privileges.

System requirements

Before installing LobbyWorks, ensure that the following hardware and software requirements are met:

Components	**Requirements (Client)**	**Requirements (Server)**
Processor	Pentium Pro System with 1GB RAM	Pentium Pro System with 2GB RAM
Hard Disk (free space)	500 MB and above	20 GB
Port	USB Multiport for extended support	-
Operating System	Windows XP Service Pack 2 OR Service Pack 3 OR Windows Vista Service Pack 1 Business	Windows 2003 Server Windows Vista Business Edition

LobbyWorks Administrator must be installed in the server and the rest of the applications must be installed in the client side.

LobbyWorks Web Center and Adapter must be installed only in the IIS Server.

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Installing LobbyWorks 4.0

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In this chapter...

Overview

LobbyWorks applications and database can be installed on the same computer or on different computers based on the number of employees in the company. In a company where the number of employees is less, all the LobbyWorks applications and the database can be installed in one computer.

If there are more employees, the LobbyWorks Administrator, Web Center applications, and the database can be installed on one server. The Front Desk, Web Center, and Adapter applications can be installed in one or more client computers.

This chapter describes installation of LobbyWorks applications and database.

Installing LobbyWorks

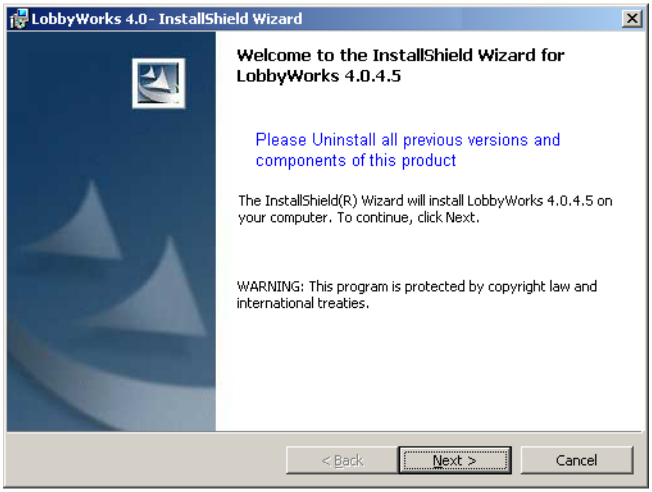
Using the LobbyWorks installation wizard, you can install the LobbyWorks applications and database on your computer.

Installing LobbyWorks database

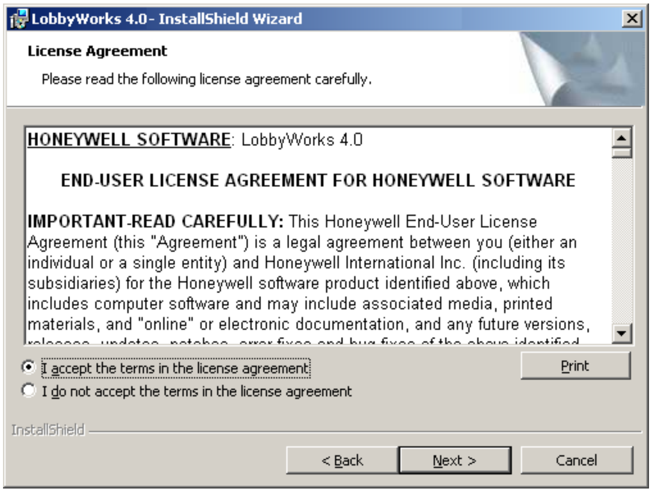
The LobbyWorks database is used for storing the data and is connected by a client computer through network.

To install LobbyWorks database:

1. Insert the LobbyWorks disc into the CD-ROM drive. The **Preparing to Install** screen appears. If the setup does not open automatically, browse to the CD-ROM folder and run the **Setup.exe** file. The **Preparing to Install** screen appears, and then the **Welcome** screen appears.

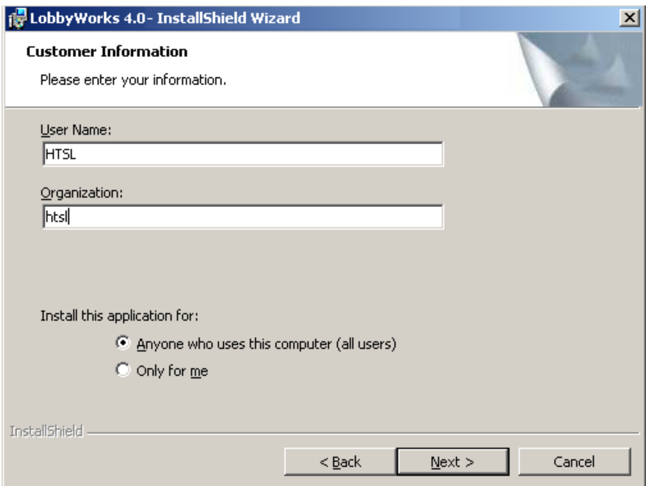


2. Click **Next**. The **License Agreement** screen appears.



3. Read through the license agreement and click **I agree the terms in the license agreement** to accept the license agreement. Click **Next**. The **Customer Information** screen appears.

   Note: You cannot install LobbyWorks till you agree to the terms in the license agreement.

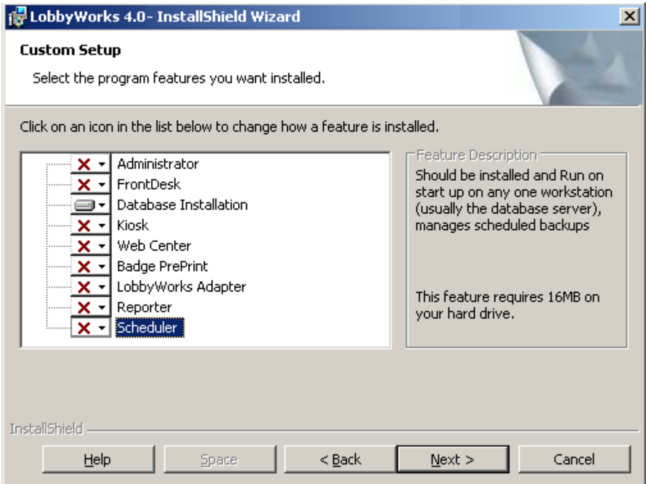


4. Type the **User Name** and the name of your **Organization**.

5. Select one of the following installation options to allow application for:

- **Anyone who uses this computer -** Anyone with access rights to this computer can use LobbyWorks applications.
- **Only for me -** The administrator or the current logged in user with access rights to this computer can use LobbyWorks applications.

6. Click **Next**. The **Custom Setup** screen appears.

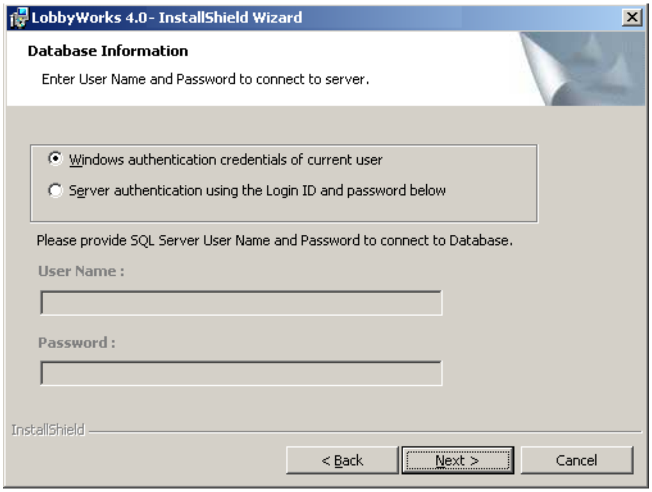


7. To install only the database, disable the installation of other applications

   To disable the installation of an application, select an application and click ▾. A drop-down pop-up appears. Select **This feature will not be available**.

   By default all the applications and database are enabled.

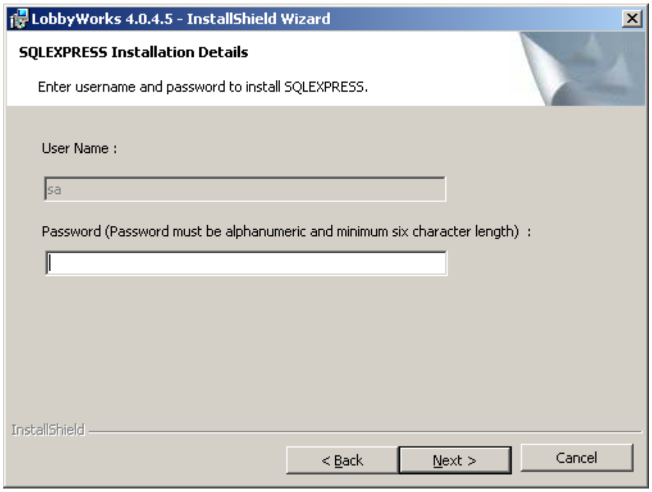
8. Click **Next**. The **Database Information** screen appears.



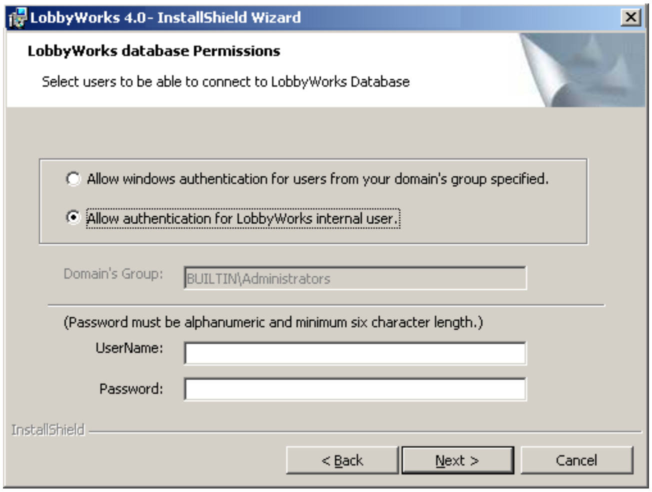
9. Select one of the following server connectivity options:
   - **Windows authentication credentials of current user**: To enable connectivity to the database server, using Windows authentication.
   - **Server authentication using the Login ID and password below**: To enable connectivity to the database server, using server authentication. To use the server authentication, type the **User Name** and **Password** of the server.

Note: If SQL express is not installed on your system, SQL express will be installed automatically.

- When you click **Next** in the **Database Information** screen, a message prompts to confirm the SQL express installation. Click **Yes** to install SQL express.
- While installing the database, the **SQLEXPRESS Installation Details** screen appears, with a message which prompts to type password for the database server. Make a note of this user name and password. You must use them for connecting to the database server.



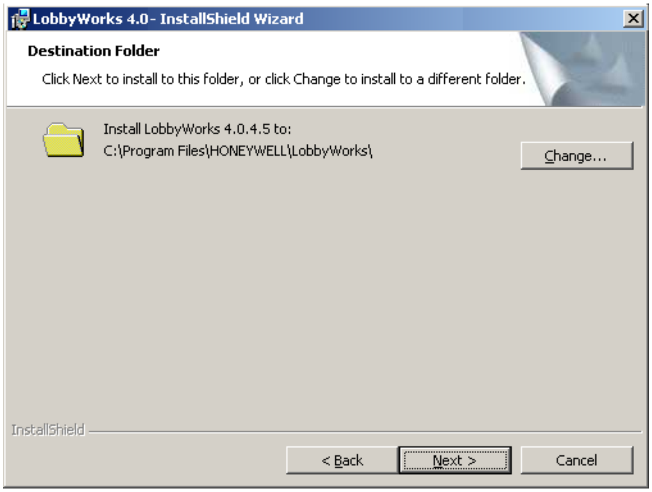
10. Click **Next**. The **LobbyWorks database Permissions** screen appears.



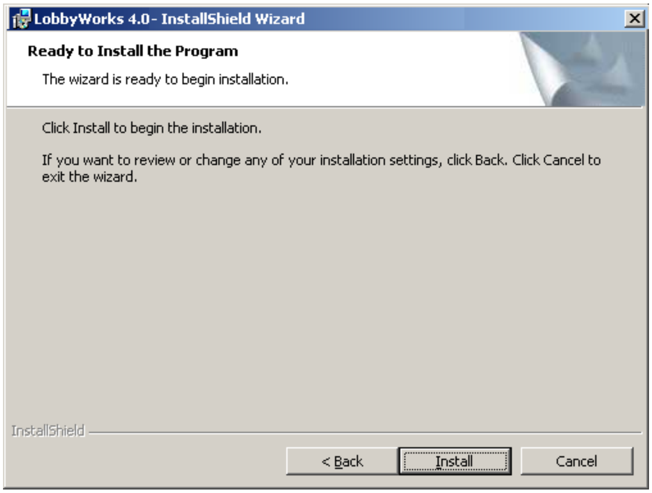
11. To select users for allowing them to connect to the LobbyWorks database, select one of the following options:

   - **Allow windows authentication** - Type your domain group's name. All the users from the group are allowed to connect to the LobbyWorks database.
   - **Allow authenticating for LobbyWorks internal user** - Type the **UserName** and **Password**. Only the LobbyWorks internal users are allowed to connect to the LobbyWorks database.

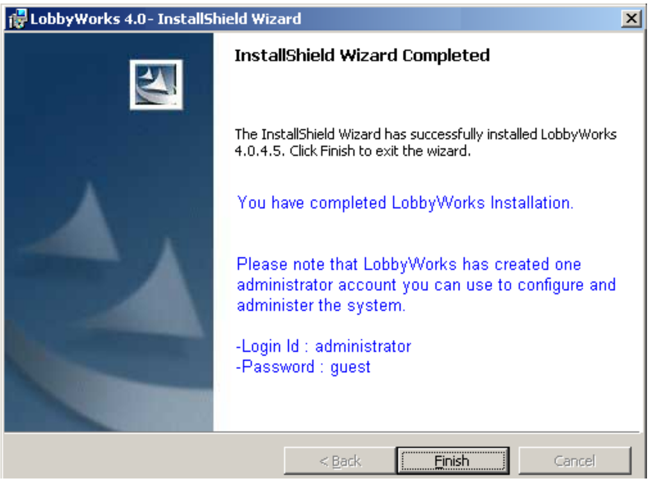
12. Click **Next**. The **Destination Folder** screen appears.



13. Click **Change** to change the destination folder, and then click **Next**. The **Ready to Install the Program** screen appears.



14. Click **Install**. The LobbyWorks database is installed.



15. Click **Finish** to finish the installation and close the wizard.

Note: If you are using LobbyWorks for the first time type the following:

a. **Login Id** as administrator.

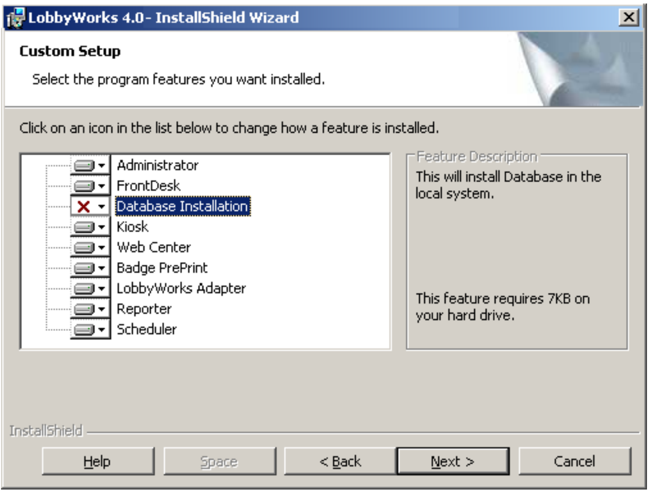
b. **Password** as guest.

Installing LobbyWorks applications

The LobbyWorks applications are installed mostly on the client computer.

To install the LobbyWorks applications:

1. To run the installation wizard, refer to Step 1 through 5 in "Installing LobbyWorks database".
2. In the **Customer Information** screen, click **Next**. The **Custom Setup** screen appears.



3. To disable the installation of LobbyWorks database, select **Database Installation** and click ▾. A drop-down pop-up appears. Select the **This feature will not be available** menu.

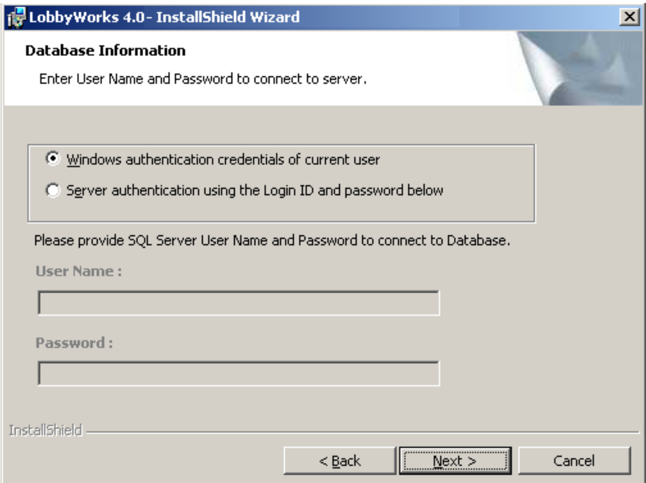
Note: Do not disable the database installation, if you are installing the LobbyWorks applications and database on a single computer.

The available applications are:

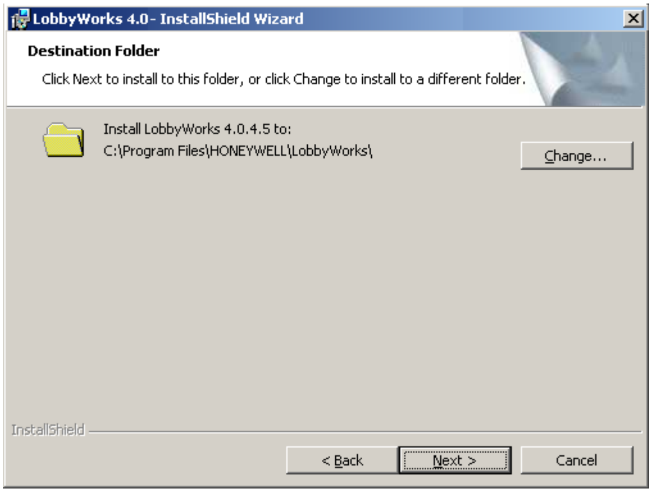
Application	Description
Administrator	Used by the LobbyWorks administrator to configure the visitor registration process, modify badge layouts, and perform other configuration activities.
Front Desk	Used by Front Desk personnel on lobby to register and track visitors at the lobby.

Application	Description
Kiosk	Used by the visitors to self-register.
Web Center	Used by the employees to pre-register their visitors. **Note:** Ensure that the you configure the IIS settings after installing the Web Center application. For more information, see Configuring IIS for Web Center on page 7.
Badge PrePrint	Used by the administrator and front desk personnel to pre-print badges for visitors.
LobbyWorks Adapter	Is a component necessary for integrating LobbyWorks with Pro-Watch®. **Note:** Ensure that the LobbyWorks Adapter option is selected to enable integration with an Access Control System.
Reporter	Used by the administrator to generate report.
Scheduler	Used by the administrator to schedule routine tasks.

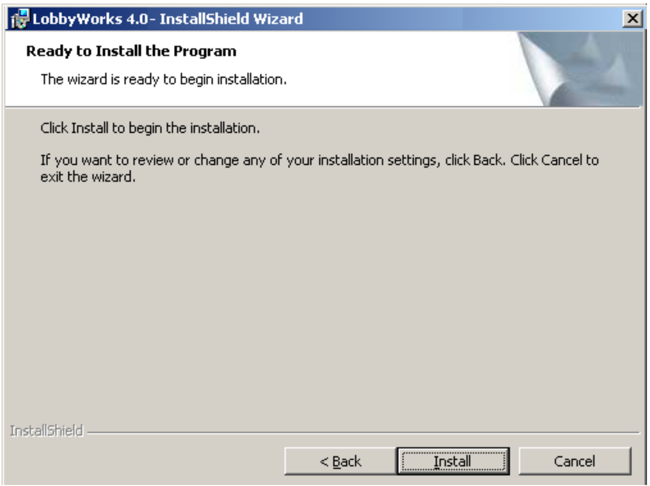
4. Click **Next**. The **Database Information** screen appears.



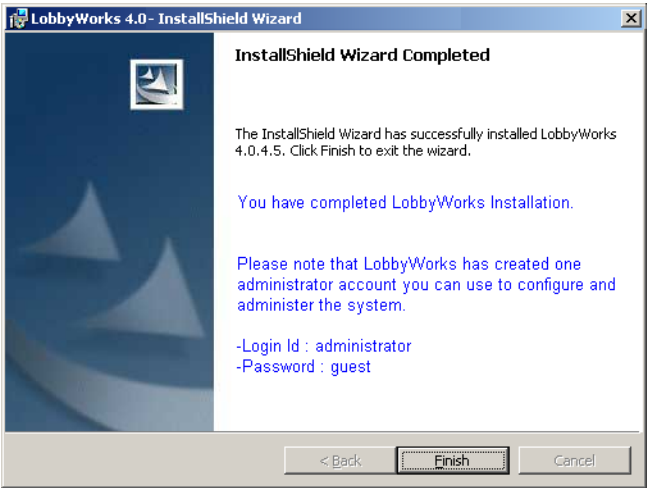
5. Type the **Server Name** of the LobbyWorks database and click one of the following connectivity options:
   - **Windows authentication credentials of current user**: To access the database server using your Windows authentication.
   - **Server authentication using the Login ID and password below**: To access the database server using the server authentication. To access the server, type the **User Name** and **Password** of the database server.
6. Click **Next**. The **Destination Folder** screen appears.



7. Click **Change** to change the destination folder, and then click **Next**. The **Ready to Install the Program** screen appears.



8. Click **Install**. The selected LobbyWorks applications are installed.



9. Click **Finish** to finish the installation and close the wizard.

Note: If you are using LobbyWorks for the first time type the following:

a. **Login Id** as administrator.

b. **Password** as guest.

Installing External Devices 3

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Overview

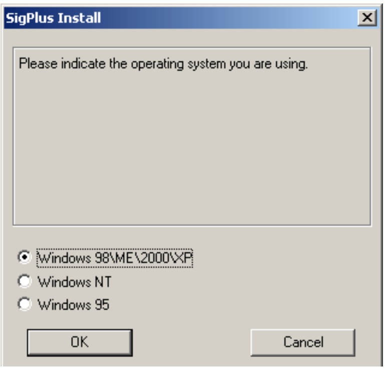
This chapter describes installation of Sign pad and Scanner.

Installing Sign pad

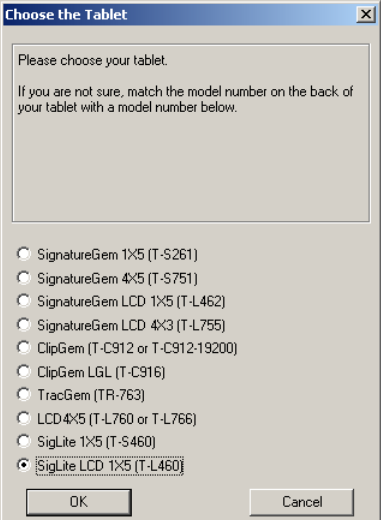
Note: Connect the Sign pad device to your computer before installing the software.

To install the Sign pad:

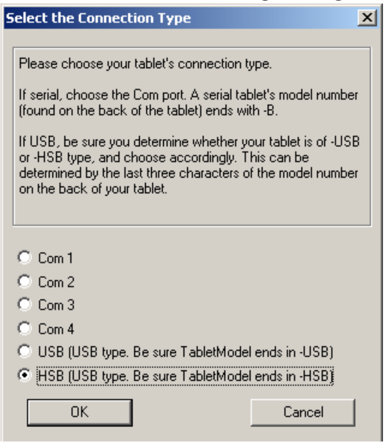
1. Insert the SignPlus disc into the CD-ROM drive. The **Preparing to Install** screen appears. If the setup does not open automatically, browse to the CD-ROM folder and run the **SignPlus.exe** file. The following dialog box appears:



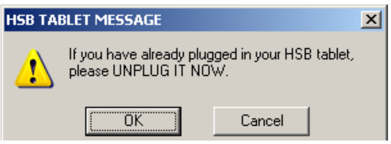
2. If you are using Windows-XP operating system, click **Windows 98\ME\2000\XP**.
3. Click **OK**. The following dialog box appears:



4. Click **Siglite LCD 1x5 (T-L460)**.
5. Click **OK**. The following dialog box appears:



6. Click the connection type for your tablet. The following dialog box appears:

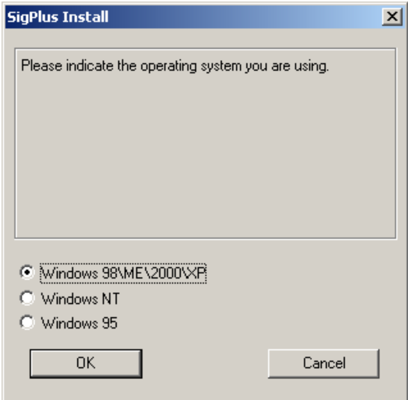


7. Click **OK** to complete the installation.

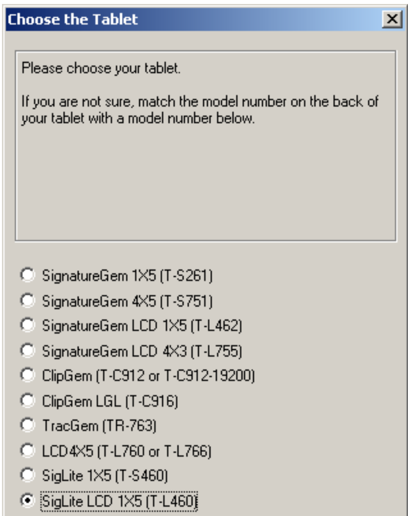
Installing Scanner

To install the Scanner:

1. Connect the Scanner to your computer before installing the software. After detecting the device, the following dialog box appears.

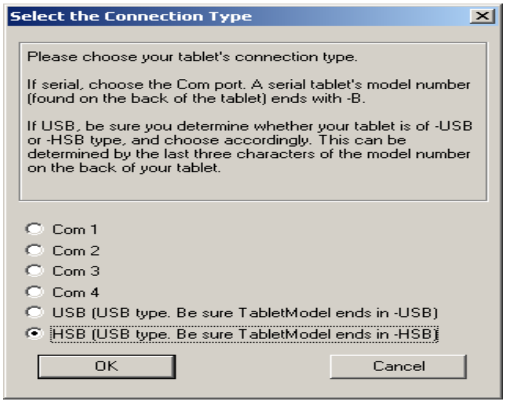


2. Click **Next**, the following dialog box appears.



3. Click **Search for the best driver in these locations.**
4. Click **Search Removable media (floppy, CD-ROM)**.

5. Click **Include this location in the search**.
6. Click **Browse** and then select the driver on you computer.
7. Click **Next**, the following dialog box appears:



8. Click **Continue Anyway** to finish the installation.

Configuring IIS for Web Center

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In this chapter...

Overview

Internet Information Services (IIS) is part of Windows XP and Windows 2003 Server, which provides a security-enhanced, easy-to-manage Web platform for reliably hosting the LobbyWorks Web Center application.

You must configure the IIS settings before using the LobbyWorks Web Center application.

Web Center is the only web application in the LobbyWorks suite. Primarily, you can use Web Center to create and manage your pre-registered visitors. For more information see, *LobbyWorks Web Center Online Help.*

After installing LobbyWorks Web Center, you can log on to the Web Center using the browser by the following ways.

- http://localhost/lobbyworks
- http://ComputerName/lobbyworks

The LobbyWorks Web Center logon page appears.

This chapter describes how to configure the IIS settings for LobbyWorks Web Center on

- Windows XP
- Windows 2003 Server

In addition, this chapter provides you information on enabling write permissions to the web folder.

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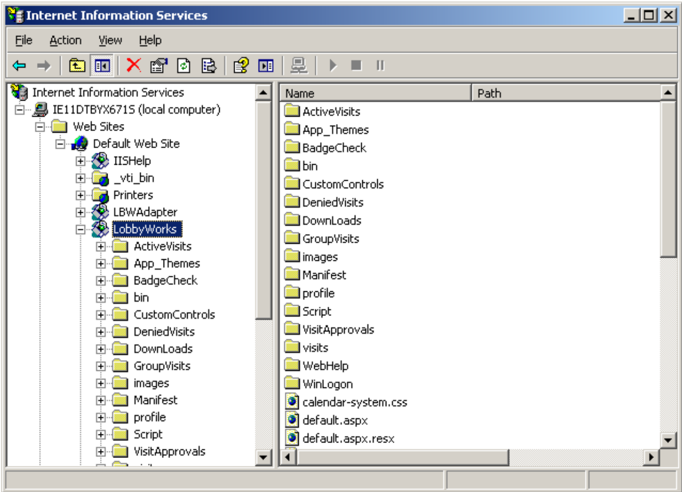
Configuring IIS on Windows XP

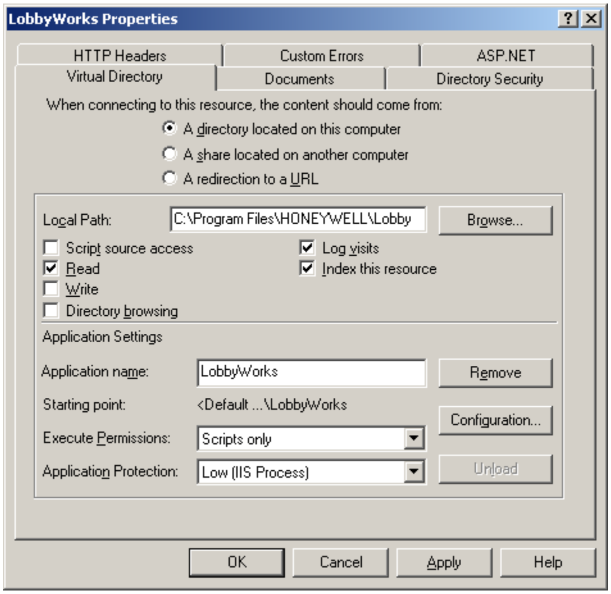
In Windows XP, by default IIS 5.0 is not installed. You must install IIS before configuring the settings.

To configure IIS 5.1

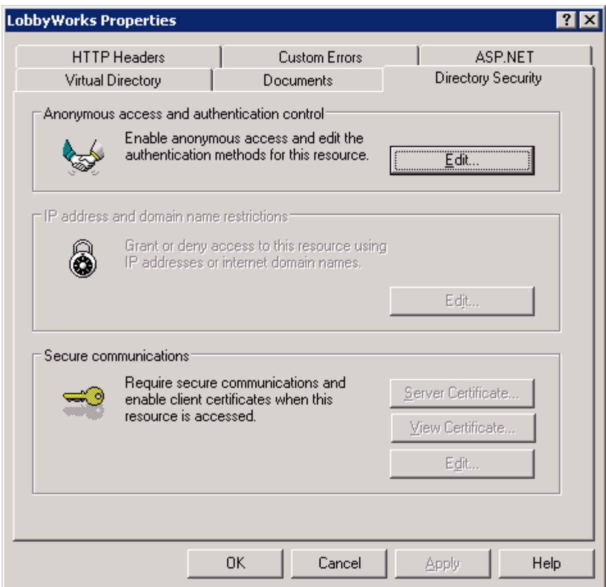
1. Choose **Start** > **Settings** > **Control Panel** > **Administrative Tools** > **Internet Information Services**. The **Internet Information Services** window appears.



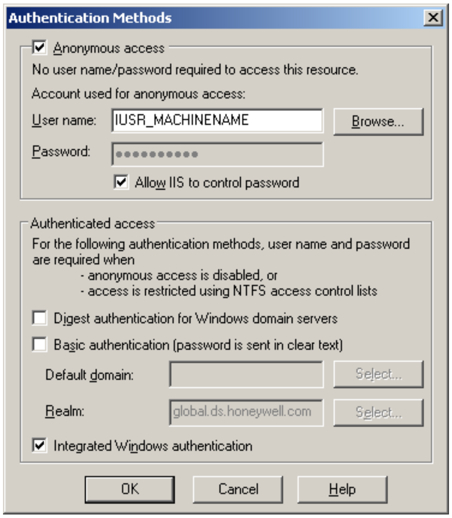
2. Expand **Web Sites** and **Default Web Site**.
3. Right-click **LobbyWorks**, and then select **Properties**. The **LobbyWorks Properties** dialog box appears.



4. Click the **Virtual Directory** tab and ensure that you configure the settings as shown in the dialog box.
5. Click the **Directory Security** tab.



6. Under **Anonymous access and authentication control**, click **Edit**. The **Authentication Methods** dialog box appears.



7. Click the **Anonymous access** check box.
8. Type the **User name**.
9. Click **OK**.
10. Click **Apply** and then click **OK**.

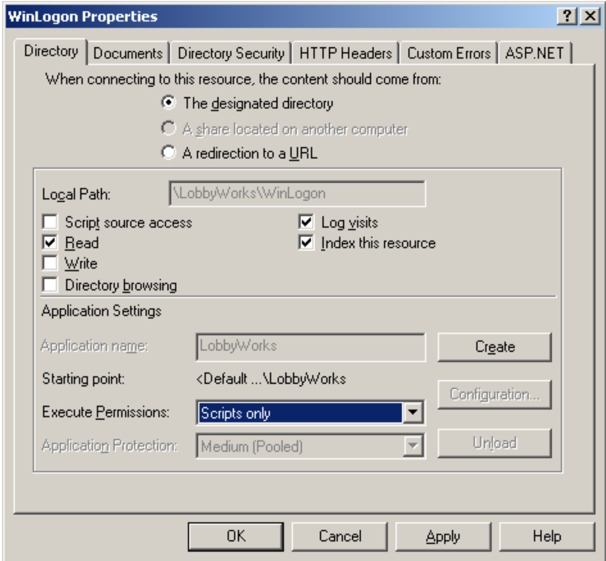
Enabling Windows authentication for Web Center users

You must enable the Windows authentication, if you want to logon to Web Center using Windows credentials.

To enable the Windows authentication

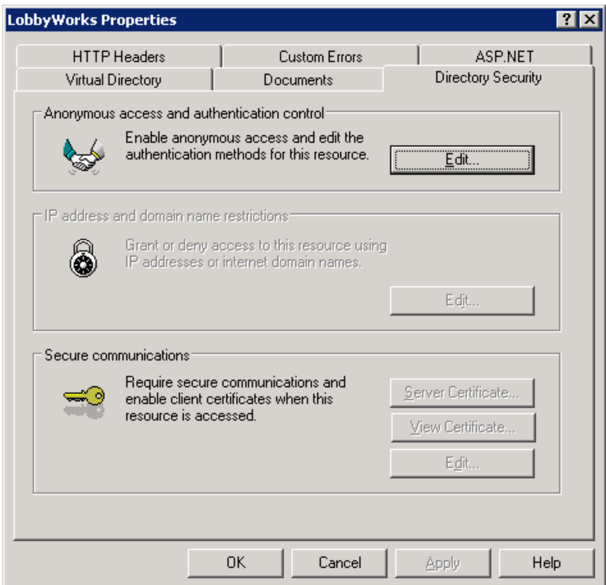
1. Choose **Start > Settings > Control Panel > Administrative Tools > Internet Information Services**. The **Internet Information Services** window appears.
2. Expand **Web Sites** and **Default Web Site**.
3. Expand **LobbyWorks** and then right-click **Winlogon**.

4. Select **Properties**. The **WinLogon Properties** dialog box appears.



5. Click the **Directory** tab and ensure you configure the settings as shown in the dialog box.

6. Click the **Directory Security** tab.



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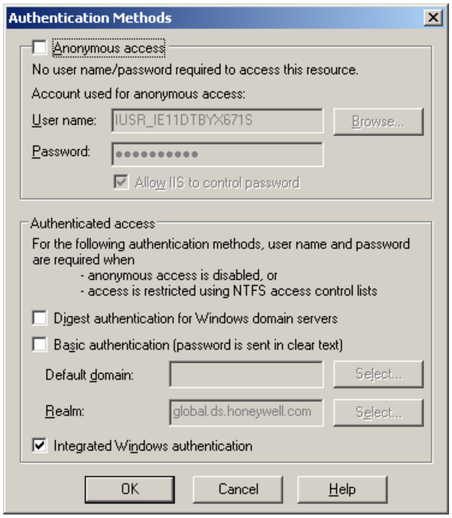
7. Under **Anonymous access and authentication control**, click **Edit**. The **Authentication Methods** dialog box appears.



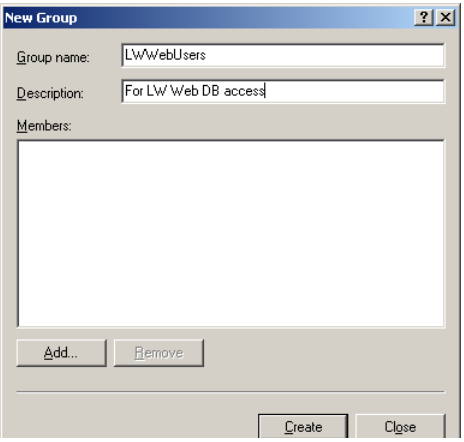
8. Clear the **Anonymous access** check box.
9. Click **OK**.
10. Click **Apply**, and then click **OK**.
11. Restart IIS.

Connecting to the database using Windows authentication

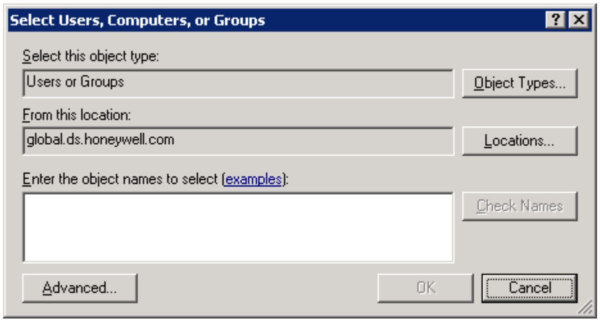
Using Windows authentication, you can connect the Web Center application to the database using the computer name in which you have installed the Web Center application.

To connect to the database

1. Choose **Start** > **Settings** > **Control Panel** > **Administrative Tools** > **Computer Management**. The **Computer Management** window appears.
2. Expand **Local Users and Groups**.
3. Right-click **Groups** and then select **New Group**. The **New Group** dialog box appears.

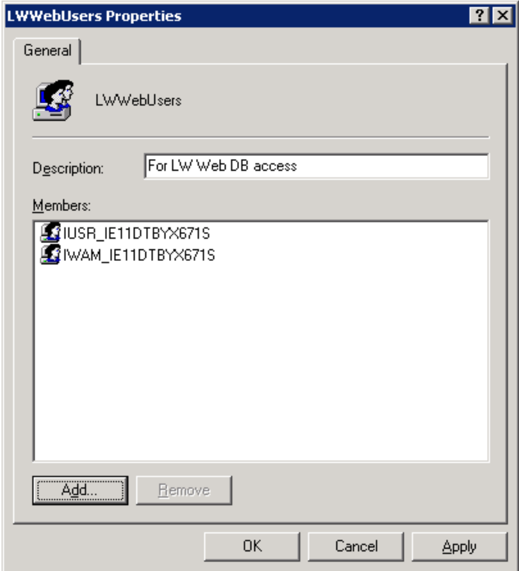


4. Type the **Group name** and **Description**.
5. Click **Create**. A new group is created.
6. Right-click **LWWebUsers**, and then select **Properties**.
7. Click **Add**. The **Select Users, Computers, or Groups** dialog box appears.



8. In the **Enter the object names to select** box, type the user name.

Example: Type *IUSR_ComputerName* and again type *IWAM_ComputerName* and then, click **OK**.



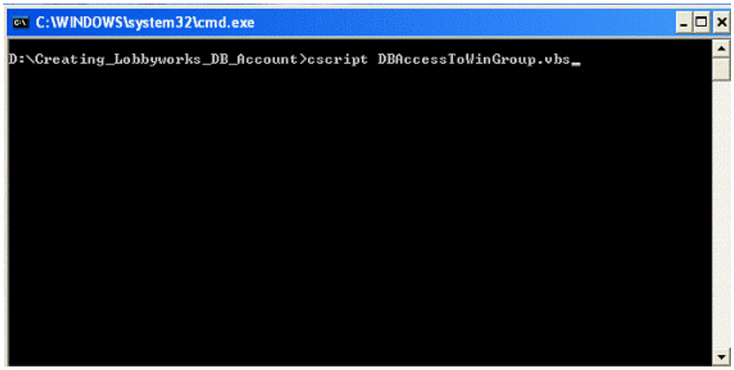
9. Click **Apply** and then, click **OK**.

After creating the users, you must provide the write permissions to the database by executing the script in the command prompt.

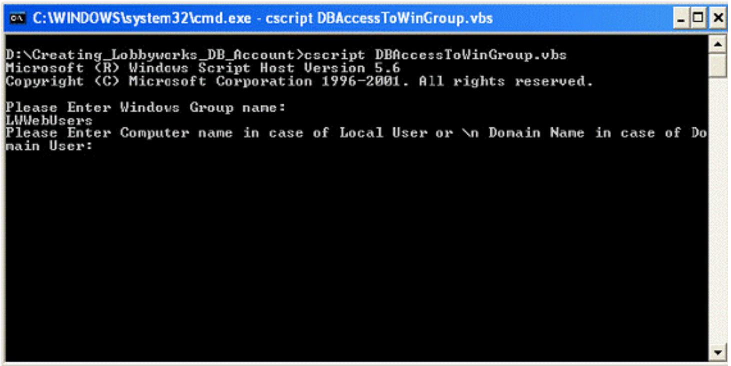
To provide the write permissions

1. Choose **Start > Run**, and then type *cmd* in the **Open** text box.The command prompt window appears.
2. In the command prompt, type the path.

   Example: [Install path]\Honeywell\WebFolder where you have saved the Web folder on your computer.



3. In the command prompt, type *cscript DBAccessToWinGroup.vbs*, and then press Enter.

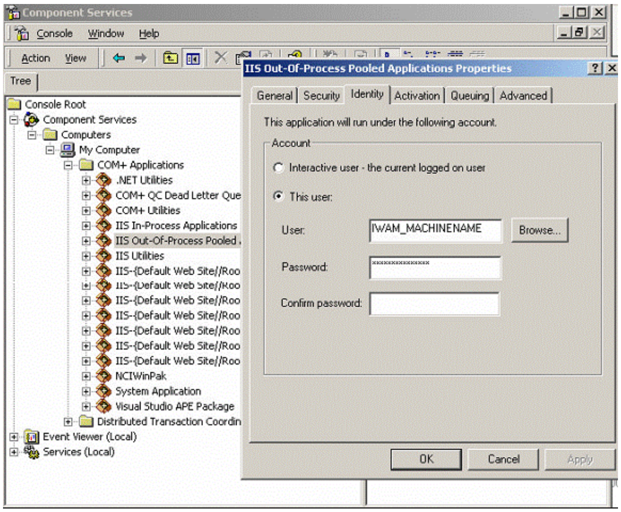


4. In **Please Enter Windows Group name**, type *LWWebUsers* and press Enter.
5. In **Please Enter Computer name in case of Local User or Domain Name in case of Domain User**, type the computer name and press Enter.
6. Restart IIS.

Configuring Web Center and database on different computers

To configure the settings

1. Add a new user *LWUser* on different computer with the same password, or you can use domain user account, if the computers are in the same domain.
2. Replace the *IUSR_ComputerName* in the Anonymous user account with *LWUser*.
3. Choose **Start >Settings > Control Panel > Administrative tools > Component Services**. The **Component Services** window appears.
4. Expand **Component Services** and **Computers**.
5. Expand **My Computer** and **COM+ Applications**.
6. Right-click **IIS-Out-Of-Process Polled Applications Properties** and select **Properties**. The following dialog box appears.



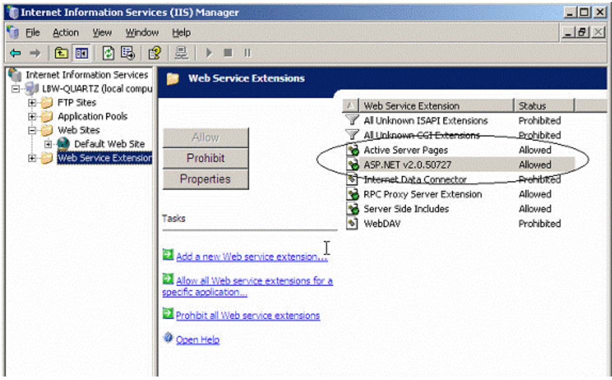
7. Click the **Identity** tab.
8. Replace the **User** *IWAM_ComputerName*.
9. On the computer where you have installed the database, provide database owner permission to Lobbyworks database to *LWUser.*
10. Restart the computer.

Configuring IIS on Windows 2003 Server

In Windows 2003 Server, by default IIS 6.0 is not installed. You must install IIS before configuring the settings.

To configure IIS 6.0

1. Choose **Start > Settings > Control Panel > Administrative Tools> Computer Management**.The **Computer Management** window appears.
2. Expand **Services and Applications**.
3. Select **Internet Information Services (IIS)**.The **Internet Information Services IIS Manager** window appears.



4. Click **Web Service Extensions**.
5. In the right pane, set the status of the following Web Service Extension to allowed.
   – Active server pages
   – Server side includes
   – ASP.NET v2.0

Note: After changing the status, verify if the application is created, if not performing the following steps.

1. Choose **Start > Settings > Control Panel > Add or Remove programs > Windows components > Application Services**.The **Application Server** dialog box appears.
2. Select **Internet Information Services (IIS)**. The **Internet Information Services** window appears.
3. Expand **Web Sites** and **Default Web Site**.

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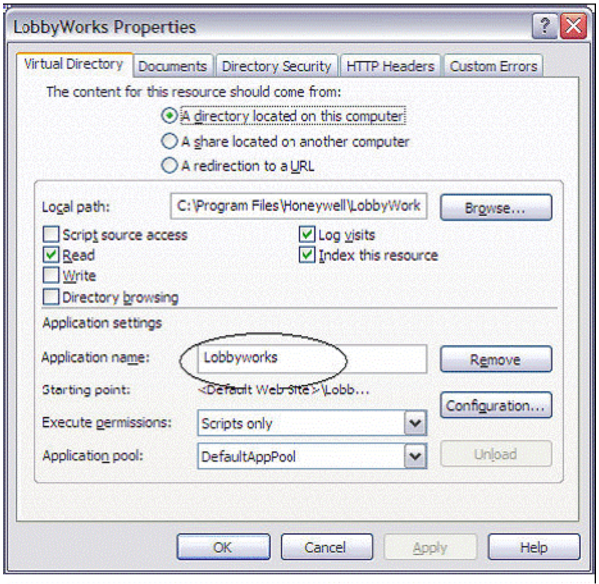
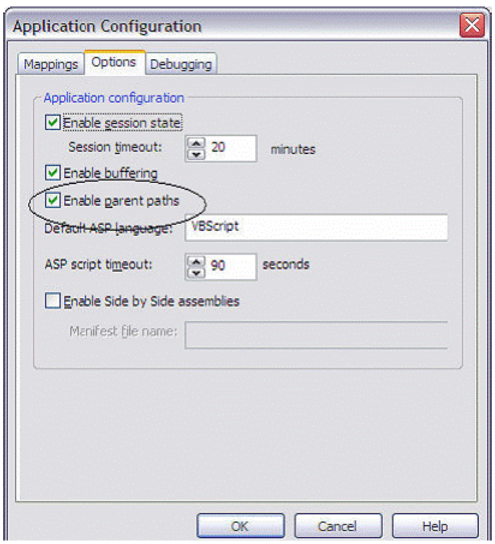
4. Right-click **LobbyWorks**. The **LobbyWorks Properties** dialog box appears.



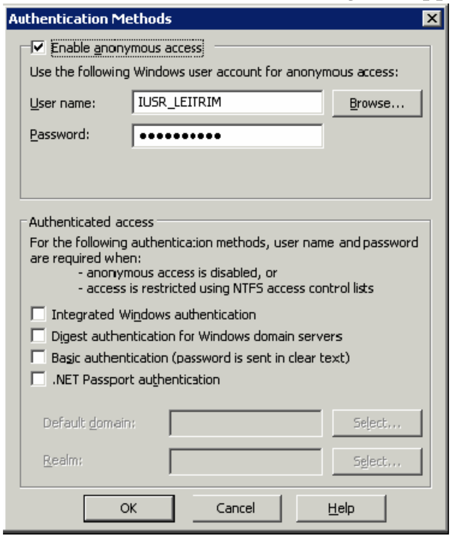
5. Click the **Virtual Directory** tab.

6. Type the **Application name** as **LobbyWorks**, if the text box is empty.

7. Click **Configuration**.The **Application Configuration** dialog box appears.



8. Click the **Options** tab.
9. Under **Application configuration**, select the check boxes.
   – Enable session state
   – Enable buffering
   – Enable Parent paths
10. Click **OK**.
11. In the **LobbyWorks Properties** dialog box, click the **Directory Security** tab.
12. Under **Authentication and access control**, click **Edit**.The **Authentication Methods** dialog box appears.



13. Select **Enable anonymous access** check box.
14. Type the **User name** and **Password**.
15. Click **OK**.

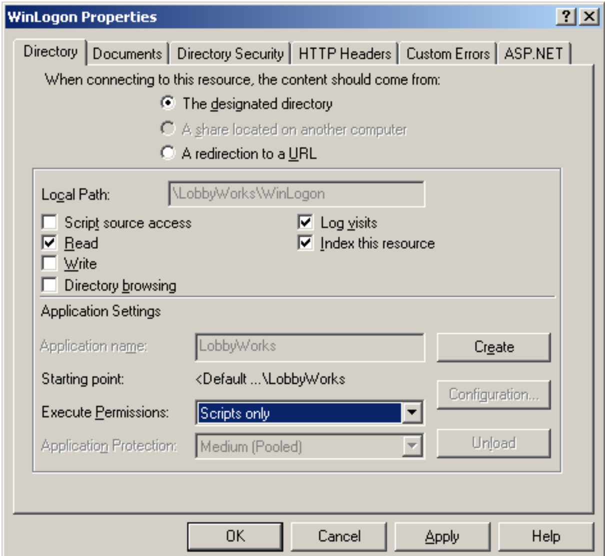
Enabling Windows authentication for Web Center users

You must enable the Windows authentication, if you want to logon to Web Center using Windows credentials.

To enable the Windows Authentication

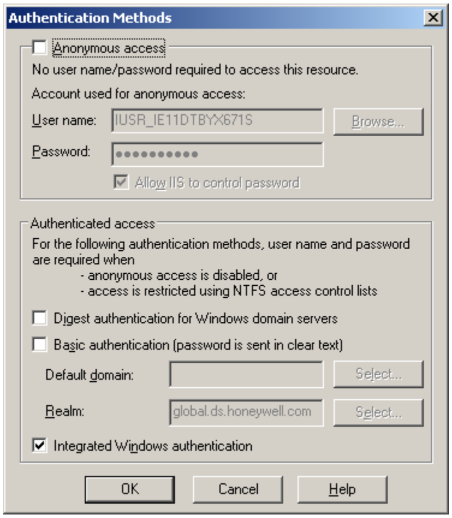
1. Choose **Start** > **Settings** > **Control Panel** > **Administrative Tools** > **Internet Information Services**. The **Internet Information Services** window appears.

2. Expand **Web Sites** and **Default Web Site**.
3. Right-click **LobbyWorks**. The **LobbyWorks Properties** dialog box appears.
4. Right-click **Winlogon** and then select **Properties**. The **WinLogon Properties** dialog box appears.



5. Click the **Directory** tab and ensure you configure the settings as shown in the dialog box.
6. Click the **Directory Security** tab.

7. Under **Anonymous access and authentication control**, click **Edit**. The **Authentication Methods** dialog box appears.



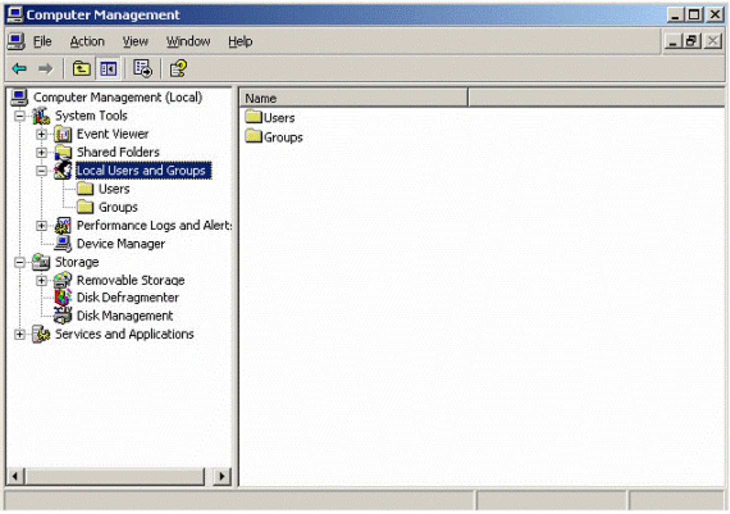
8. Clear the **Anonymous access** check box.
9. Click **OK**.
10. Click **Apply** and then click **OK**.
11. Restart IIS.

Connecting to the database using Windows authentication

Using Windows authentication, you can connect the Web Center application to the database using the two computer names.

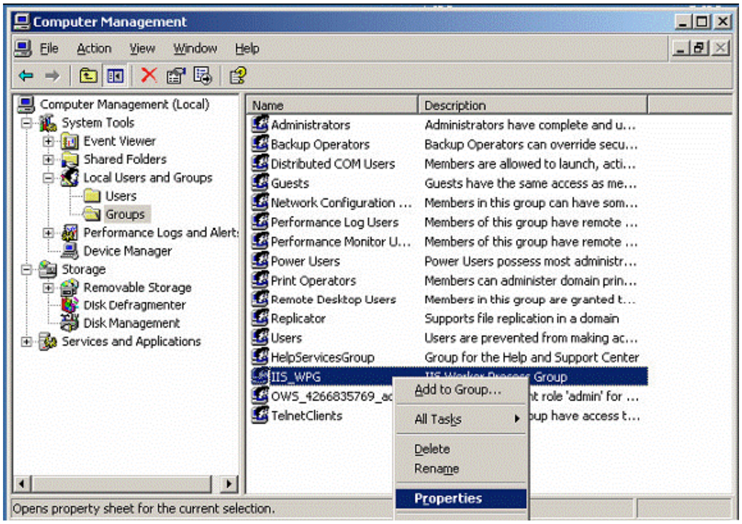
To connect to the database

1. Right-click **My Computer** and then select **Manage**. The **Computer Management** window appears.

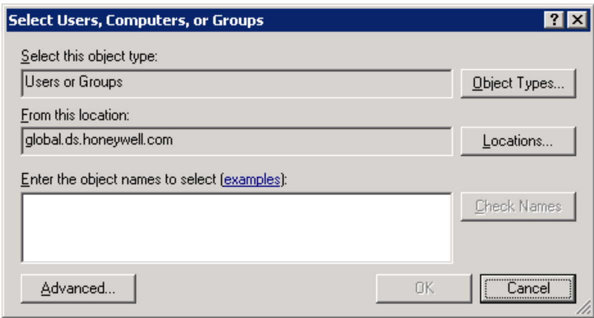


2. Expand **Local Users and Groups**.

3. Right-click **Groups**. The following window appears.



4. Right-click **IIS_WPG**, and then select **Properties**.
5. Click **Add**. The **Select Users, Computers, or Groups** dialog box appears.



6. In the **Enter the object names to select** box, type the user name.

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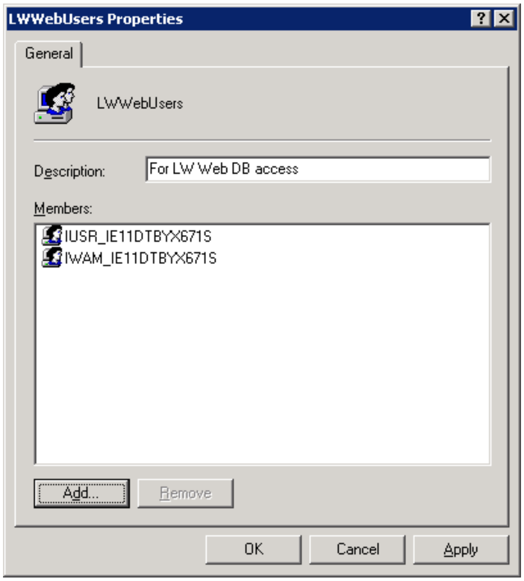
Example: Type *IUSR_ComputerName* and again type *IWAM_ComputerName* and then, click **OK**.

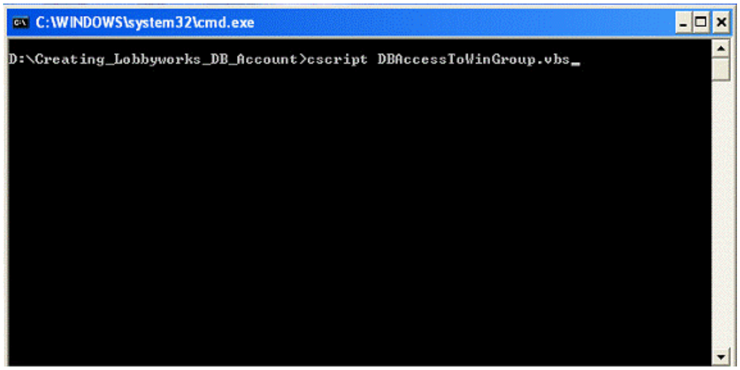


7. Click **Apply** and then, click **OK**.

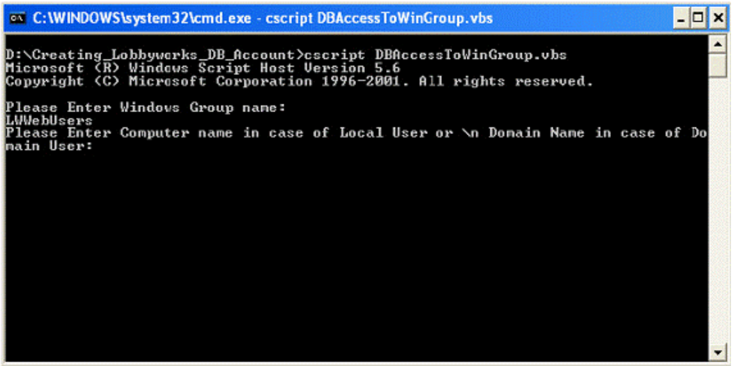
After creating the users, you must provide the write permissions to the database by executing the script in the command prompt.

To provide the write permissions

1. Choose **Start > Run**, and then type *cmd* in the **Open** text box.The command prompt window appears.
2. In the command prompt, type the path where you have installed the Web folder.



3. In the command prompt, type *cscript DBAccessToWinGroup.vbs,* and then press Enter.



4. In the **Please Enter Windows Group name** box, type *LWWebUsers* and press Enter.

5. In the **Please Enter Computer name in case of Local User or Domain Name in case of Domain User** box, type the computer name and press Enter.

6. Restart the computer.

Configuring Web Center and database on different computers

You can configure the Web Center and Database, if they are in the

- same domain
- different domain

Web Center and Database in the same Domain

1. Choose **Start > Settings > Control Panel > Administrative Tools > Internet Information Services**. The **Internet Information Services** window appears.
2. Expand **Web Sites and Default Web Site**.
3. Right-click **LobbyWorks** and then select **Properties**. The **LobbyWorks Properties** dialog box appears.
4. Select the **Directory Security** tab.
5. Under **Anonymous access and authentication control**, click **Edit**. The **Authentication Methods** dialog box appears.
6. Ensure that you select **Enable anonymous access** and **Windows authentication** check boxes.
7. Choose **Start >Settings > Control Panel > Administrative tools > Component Services**. The **Component Services** window appears.
8. Expand **Component Services** and **Computers**.
9. Expand **My Computer** and **COM+ Applications**.
10. Right-click **IIS-Out-Of-Process Polled Applications Properties** and select **Properties**.
11. Click the **Identity** tab.
12. Type the **User**.
13. Type the **Password** and **Confirm Password**.
14. Restart IIS.

Web Center and database in different domain

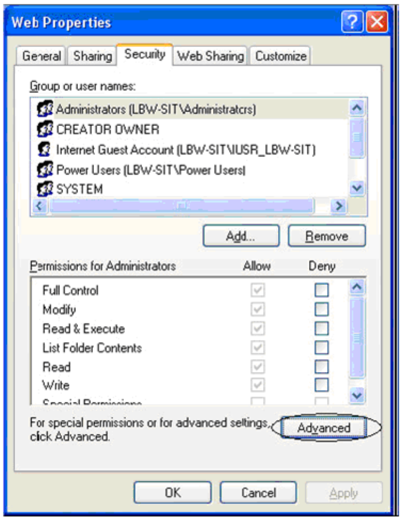
1. Create a new user on both the computer with the same password.
2. Replace the user *IUSR_ComputerName* with *LwUser*.
3. Choose **Start >Settings > Control Panel > Administrative tools > Component Services**. The **Component Services** window appears.
4. Expand **Component Services** and **Computers.**
5. Expand **My Computer and COM+ Applications**.
6. Right-click **IIS-Out-Of-Process Polled Applications Propertie**s, and then select **Properties**.
7. On the Machine where you have installed the database is installed, provide database owner permission to Lobbyworks database to the user LWUser.
8. Restart the computers.

Enabling the write permissions to the folder

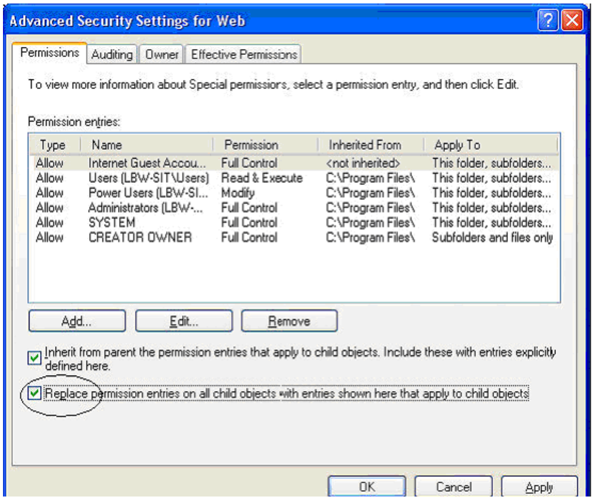
You must enable the set write permissions to the folder in which all the Web Center files are saved, if you want to import the group visitors from the .CSV file.

To enable the set write permission

1. Right-click the **Web** folder, and then select **Sharing and Security**. The **Web Properties** dialog box appears.



2. Click the **Security** tab.
3. Under **Permissions for Users**, select the **Full Control** check box.
4. Click **Advanced**. The **Advanced Security Settings for Web** dialog box appears.



5. Click **Replace permission entries on all child objects with entries shown here that apply to child objects** for the select user.
6. Click **Apply**, and then click **OK**.
7. Click **Apply**, and then click **OK** in the **Web Properties** dialog box.

Modifying LobbyWorks 4.0

5

In this chapter...

Modifying LobbyWorks installation

This chapter describes the procedure for modifying and repairing LobbyWorks.

Modifying LobbyWorks

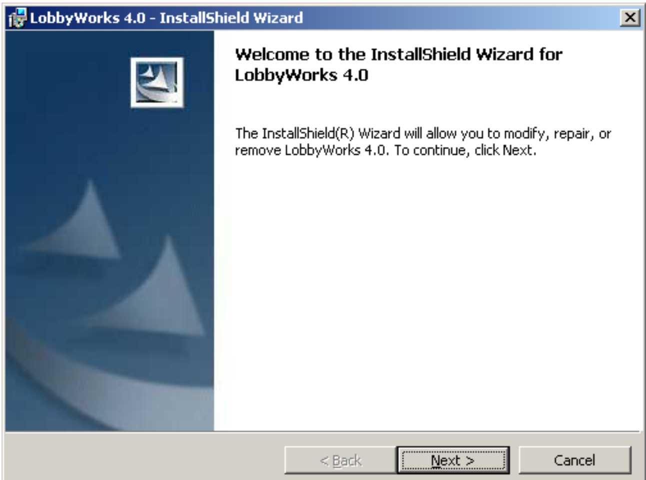
You can modify the LobbyWorks installation to add or remove a specific LobbyWorks application.

To add or remove a LobbyWorks application:

1. Run the LobbyWorks setup.

   OR

   Choose **Start** > **Control Panel** and open the **Add or Remove Programs** window. Scroll and select LobbyWorks 4.0 and click **Change**. The **Welcome** screen appears.

2. Click **Next**. The **Program Maintenance** screen appears.

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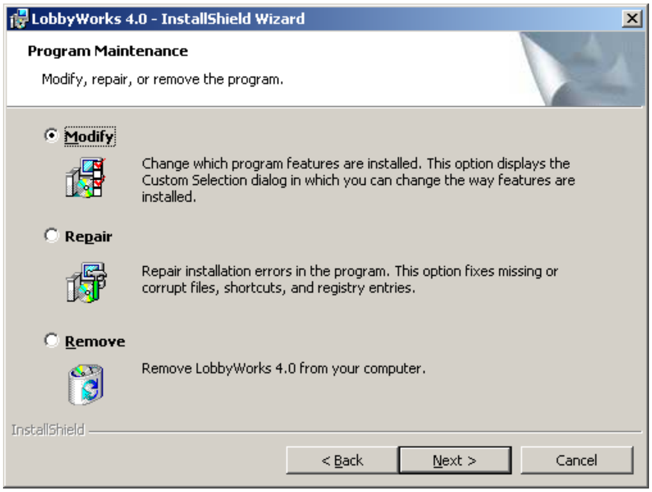
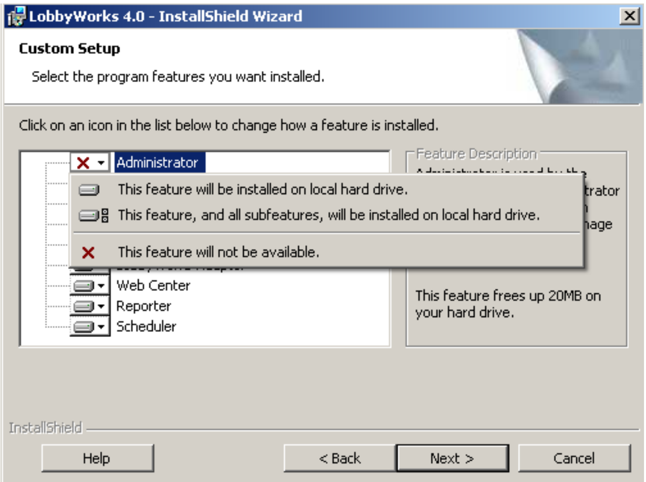
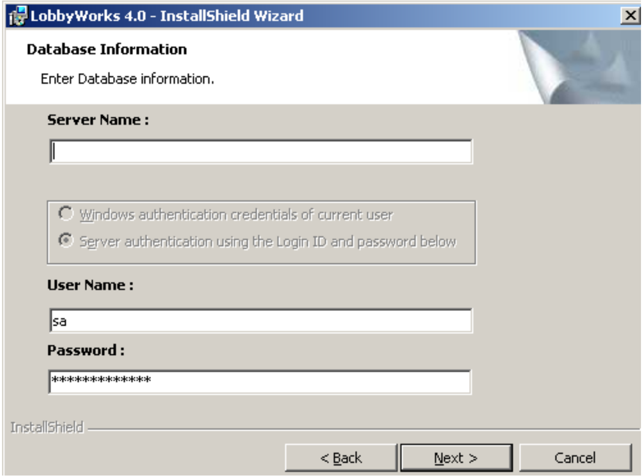


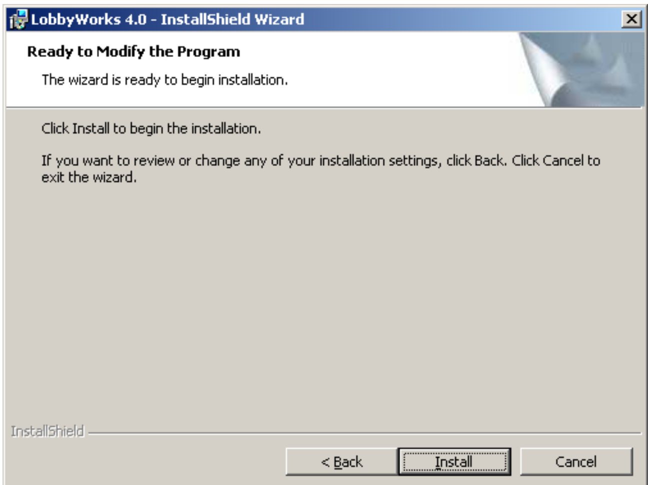
3. Select **Modify** and click **Next**. The **Custom Setup** screen appears.



4. Click and select whether the application need to be removed or installed. For example, if you want to remove Front Desk, click and select **This feature will not be available**.
5. Click **Next**. The **database information** screen appears.



6. Type the **Server Name** of the LobbyWorks database.
7. Type the **User Name** and **Password**.
8. Click **Next**, the **Ready to Modify the Program** screen appears:



9. Click **Install** to modify the program installation. The applications are removed or installed.

Note: Insert the LobbyWorks disc into the CD-ROM drive to install the applications.

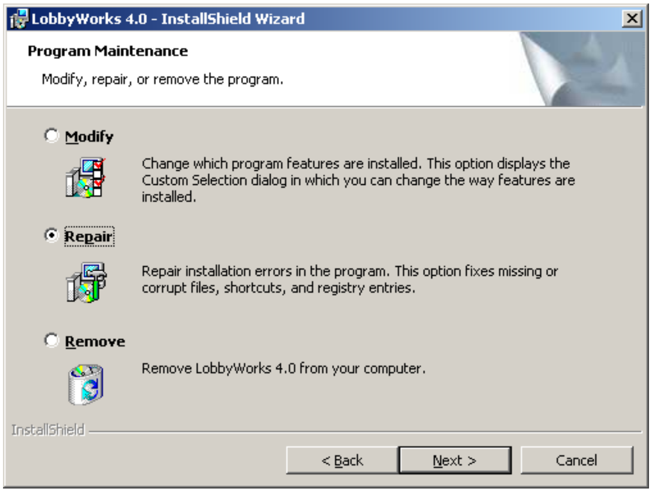
10. After completing the installation, the **InstallShield Wizard Completed** screen appears. Click **Finish** to finish the installation and close the wizard.

Repairing LobbyWorks using setup

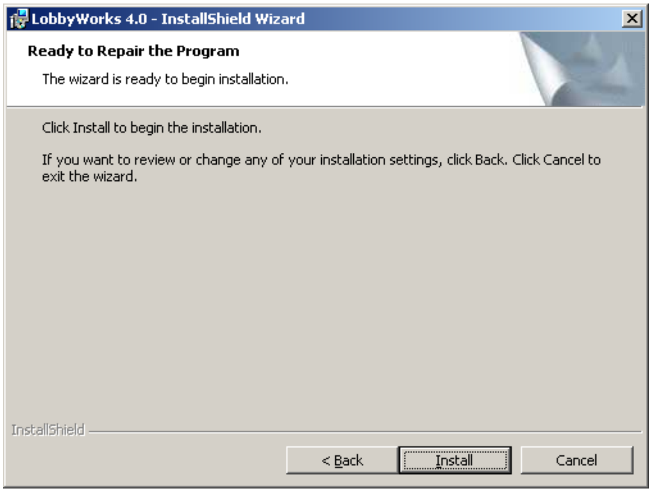
You can repair the LobbyWorks applications to resolve the missing or corrupted files, shortcuts, registry entries, and the installation errors.

To repair the LobbyWorks applications:

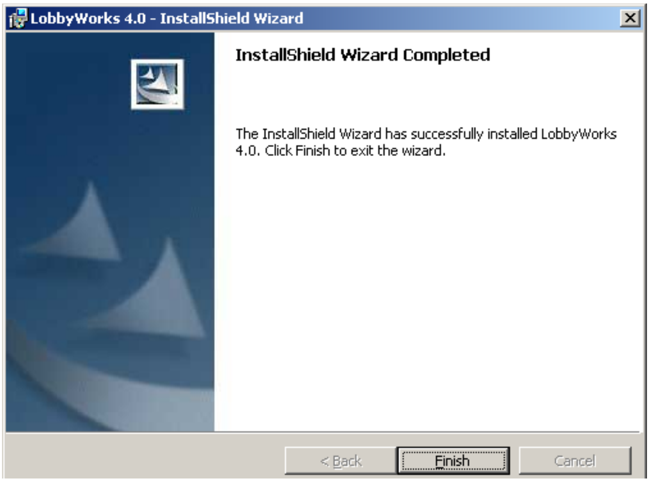
1. Run the LobbyWorks setup
2. Click **Next**. The **Program Maintenance** screen appears.



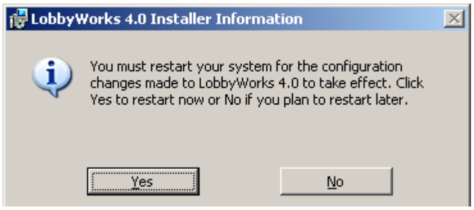
3. Select **Repair** and click **Next**. The **Ready to Repair the Program** screen appears.



4. Click **Install**. The LobbyWorks applications are repaired.



5. In the **InstallShield Wizard Completed** screen, click **Finish** to finish repairing and to close the wizard. The following dialog box appears.

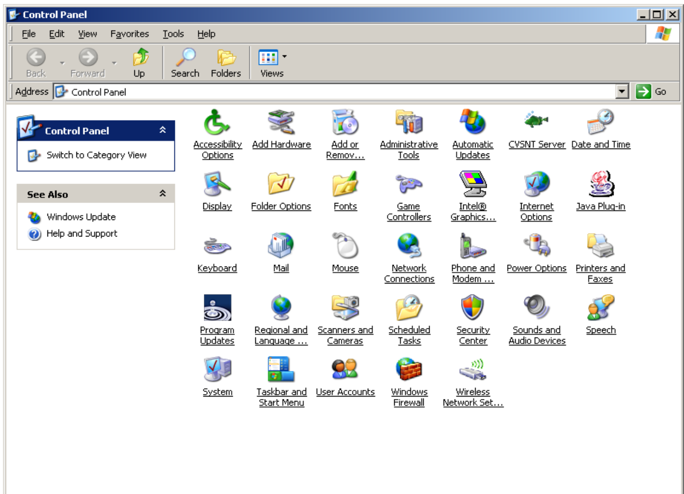


6. Click **Yes** to restart your computer.

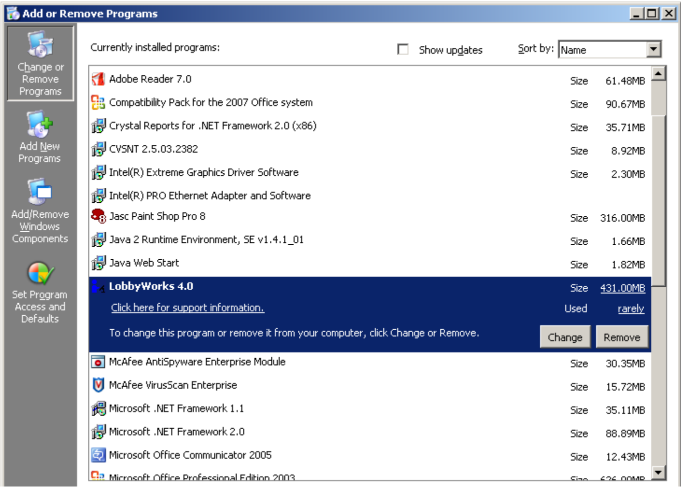
Repairing LobbyWorks using Control Panel

To repair LobbyWorks using the Control Panel:

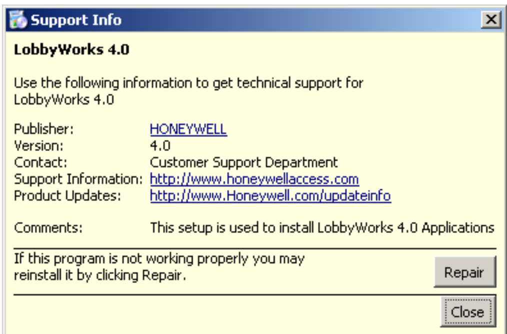
1. On the taskbar, click **Start** and choose **Settings > Control Panel**. The **Control Panel** window appears.



2. Open **Add or Remove Programs**. The **Add or Remove Programs** screen appears.



3. Scroll and select **LobbyWorks 4.0**.
4. Click **Click here for support information** to repair the selected application. A confirmation message appears.



5. Click **Repair**.

Warning: Do not delete the LobbyWorks folder from the installed location. This may corrupt the registry.

Removing LobbyWorks 4.0

6

In this chapter...

Removing LobbyWorks

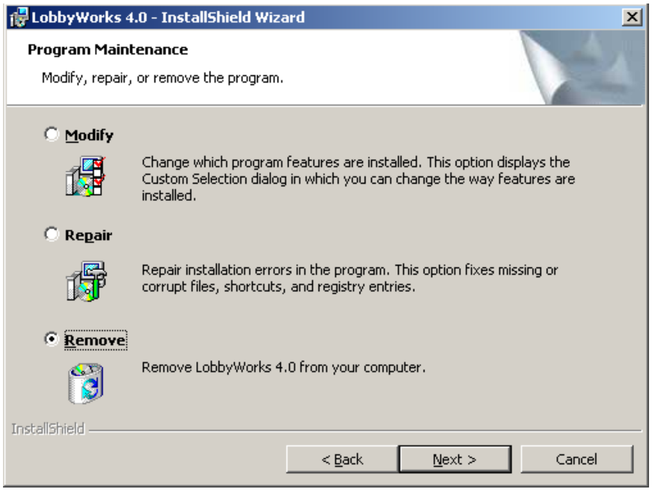
The LobbyWorks applications can be removed in the following two ways:

- Using LobbyWorks Setup
- Using Control Panel

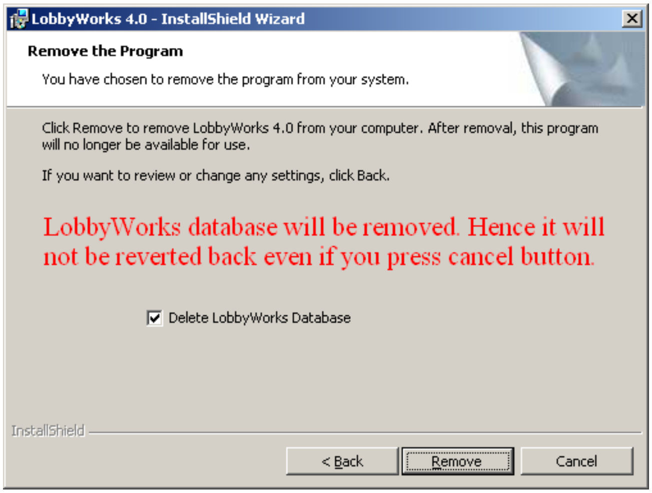
Removing LobbyWorks using the setup

To remove LobbyWorks by running the setup.exe file:

1. Run the LobbyWorks setup. The **Welcome** screen appears.
2. Click **Next**. The **Program Maintenance** screen appears.



3. Click **Remove**, and then click **Next**. The **Remove the Program** screen appears.



4. To back up the LobbyWorks database, clear the **Delete LobbyWorks DataBase** check box and click **Remove**. A confirmation message appears asking you to back up the database.
5. Click **Yes** to take back up, and then all the applications of LobbyWorks installed on your computer is removed.

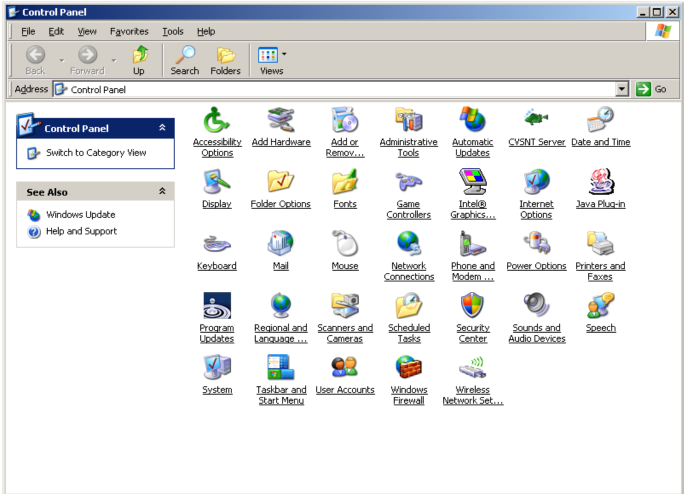
Tip: If you want to remove a specific LobbyWorks application, refer to Modifying LobbyWorks installation.

6. After removing LobbyWorks, the **InstallShield Wizard Completed** screen appears. Click **Finish** to close the wizard.

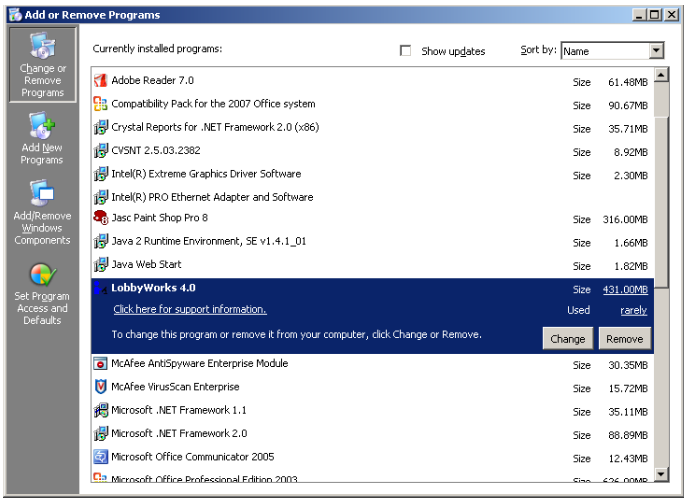
Removing LobbyWorks using Control Panel

To remove LobbyWorks using the Control Panel:

1. On the taskbar, click **Start** and choose **Settings > Control Panel**. The **Control Panel** window appears.



2. Open **Add or Remove Programs**. The **Add or Remove Programs** screen appears.



3. Scroll and select **LobbyWorks 4.0**.

4. Click **Remove** to remove the selected application. A confirmation message appears.
5. Click **Yes** to remove.

Warning: Do not delete the LobbyWorks folder from the installed location to remove LobbyWorks. This may corrupt the registry.

Troubleshooting

7

In this chapter...

Fixing LobbyWorks Issues

This section provides you information about some of the errors and warnings found while using the LobbyWorks applications, and steps to resolve them.

Issue

Unable to Install LobbyWorks Web Center and Adapter applications.

Resolution

If IIS is not installed on the computer, install it before installing LobbyWorks Web Center and Adapter.

To install Internet Information Services (IIS):

1. Choose **Start >Settings > Control Panel > Add or Remove Programs**.
2. In the **Add or Remove Programs** window, click **Add/Remove Windows Components**. The **Windows Components Wizard** appears.
3. In the Component list, select the **Internet Information Services (IIS)** checkbox, and then click **Details**.
4. In **Internet Information Services (IIS)** dialog box, select **SMTP Service** checkbox, and then click **OK**.

Note: If you are using Windows 2003 Server Operating System.

1. Repeat the steps 1 to 2.
2. In the Component list, select **Application Server**, the **Application Server** dialog box appears.
3. Select **Internet Information Services** (IIS), and then click **OK**.

Insert the Windows Operating System CD into the CD-ROM drive and run through the remaining screens in the wizard.

Issue

Unable to install LobbyWorks 4.0 on your hard disk.

Resolution

Ensure that you computer meets LobbyWorks minimum free space requirements.

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Issue

Unable to start LobbyWorks 4.0 in Windows Vista.

Resolution

Log on to the computer with the administrator privileges.

Issue

Unable to detect the scanner while installing the software.

Resolution

Remove the cable from the USB port and insert it in different USB port and then run the hardware detection wizard again.

Issue

End User Licence Agreement poping up all the time

Resolution

Delete/Rename the Agreement.txt file in the [installed path]\bin folder.

Issue

LobbyWorks licensing is not supported in different time zone.

Resolution

Ensure that the time zones of both the client and the server machine are same.

Note: If you enable the Automatically adjust clock for daylight saving changes option in the server machine, then you must enable the same option in the client machine to launch the LobbyWorks client applications.

Issue

Unable to logon to the LobbyWorks applications with different users.

Resolution

1. Open [Install path]\Program Files\HONEYWELL\LobbyWorks\Bin\Lobbyworks.config.

Note: [Install path] is the installation drive for LobbyWorks applications.

2. Locate the word **Logon**.

Example: <add key="**Logon**" **value**="*james wattson*" />

3. Delete the text which is inside the double quotes across the word value.

Example: <add key="**Logon**" **value**=" " />

4. Save the file.

Issue

Unable to start the log files

Resolution

1. Open C:\Program Files\HONEYWELL\LobbyWorks\Bin\Lobbyworks.config.

Note: C:\ installation drive for LobbyWorks applications.

2. Locate the word **LogLevel**.

Example: <add key="**LogLevel**" value="0" />

3. Change the value from 0 to 3 which is inside the double quotes across the word value. By default, the value is 0

Example: <add key="**LogLevel**" value="3" />

4. Save the file.

Issue

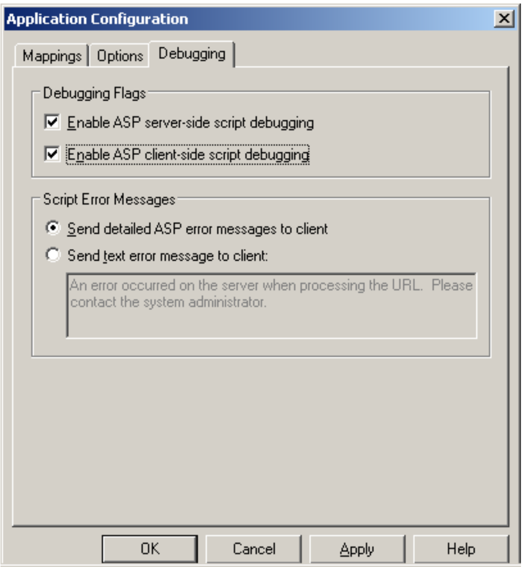
If you get errors messages such as page not found, or internal server error.

Resolution

Case 1: Server Side

1. Right-click **My computer,** and then select **Manage**. The Computer Management window appears.
2. Expand **Services and Applications** and **Internet Information Services**.
3. Expand **Web sites and Default Web site**.
4. Right-click **LobbyWorks** and then select **Properties**. The **Lobbyworks Properties** dialog box appears.

5. Click **Virtual Directory** tab, and then click **Configuration**. The **Application Configuration** dialog box appears.



6. Click the **Debugging** tab and ensure that you configure the settings as shown in the dialog box.
7. Click **OK**.
8. Click **Apply** and then click **OK**.

Case 2: Client Side

1. Open **Internet Explorer**.
2. On the **Tools** menu, select **Internet Options**.
3. Click the **Advanced** tab.
4. Clear the **Show Friendly HTTP error messages** check box.
5. Click **Apply**, and then click **OK**.

Issue

In the badge layout, sign in time is not printed on the badge.

Resolution

To display the sign in time on the badge.

1. Log on to LobbyWorks Administrator >Badge Layouts > Designer.

2. Select data field as registration time and mark the same in the badge.
3. In the left pane, select Longtime.
4. Save the settings.

Issue

Error code 11 LicenseGenerationdate Greater than Current Date.

Resolution

Ensure that you set the date to current date and time, in the computer in which you have installed the Lobbyworks Administrator.

Issue

Unable to match the previous visitors using the Web Center.

Resolution

Log on to the Web Center again to match the visitors.

Issue

Kiosk UI goes blank, when a temporary card for an employee is added.

Resolution

1. Import employees from the active directory. hence these would not have the photographs. The machine had Microsoft image writer printer
2. Log on to Kiosk application using an employee (without photograph)
3. Select the **Temporary card** checkbox.
4. Click **Print Badge.**
5. Restart Kiosk.

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Domain related and Web Connectivity Issues

For more information about....	Refer to the following KB article
How IIS authenticates browser clients	http://support.microsoft.com/kb/264921
Description of Microsoft Internet Information Services (IIS) 5.0 and 6.0 status codes	http://support.microsoft.com/kb/318380
Troubleshooting HTTP 401 errors in IIS	http://support.microsoft.com/kb/907273
How to Create a Trust Relationship from One Computer	http://support.microsoft.com/kb/111565
For more information on IIS 6.0 Security	http:/securityfocus.com/infocus/1765
For more information on ASP Error Messages	http://support.microsoft.com/default.aspx?scid=kb;en-us;294271&Product=iis60

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Installing Notify

8

In this chapter...

About Notify

The LobbyWorks Notify application performs the function of sending notification alerts to the host when the visitor signs in, signs out, or/and registers.

The application can be used by the employees of a company to do the following:

- Authorize/decline their visitors.
- Extend the visitors' visit durations.
- Sign-out the visitors.
- Assign the visitor to a different host.

For information about how to perform these tasks, refer to the Notify online help.

Installing the Notify application

This section describes the steps for installing the Notify application.

Note: Ensure that Notify is installed on all the employee workstations and at the Front Desk.

System requirements

Before you start installing the application, ensure that the workstation meets the following requirements.

Minimum requirements

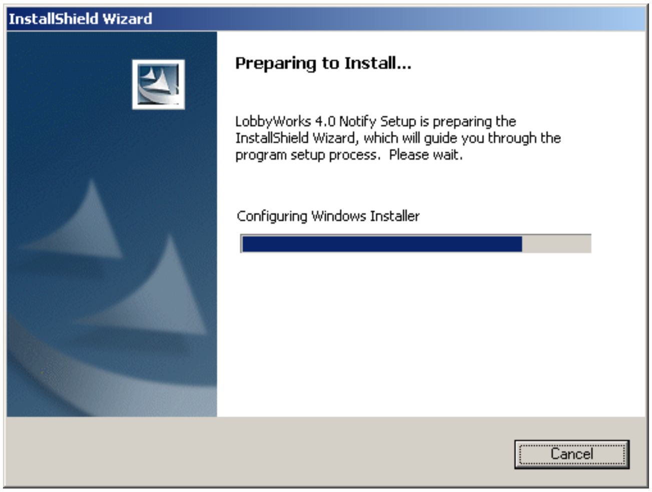
Processor	Pentium Pro System with 1GB RAM
Operating System	Windows XP Service Pack 2 OR Service Pack 3 OR Windows Vista Service Pack 1 Business

Note: To log on to LobbyWorks on a shared computer, you must have administrator or power user privileges. On a computer with Windows Vista, you must have administrator privileges to log on to the LobbyWorks application.

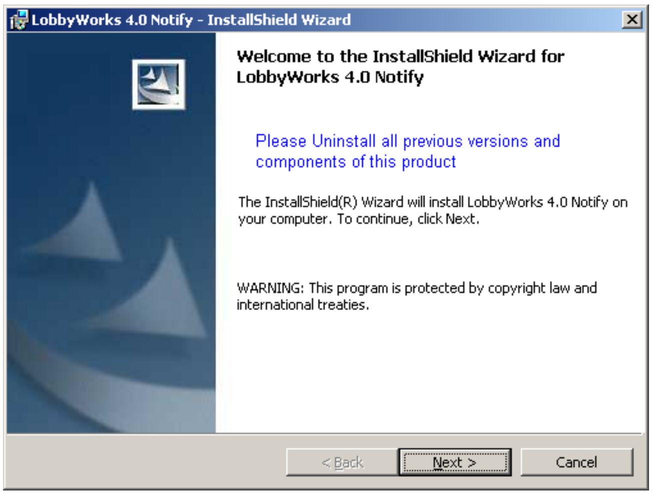
Procedure

To install the application, perform the following steps.

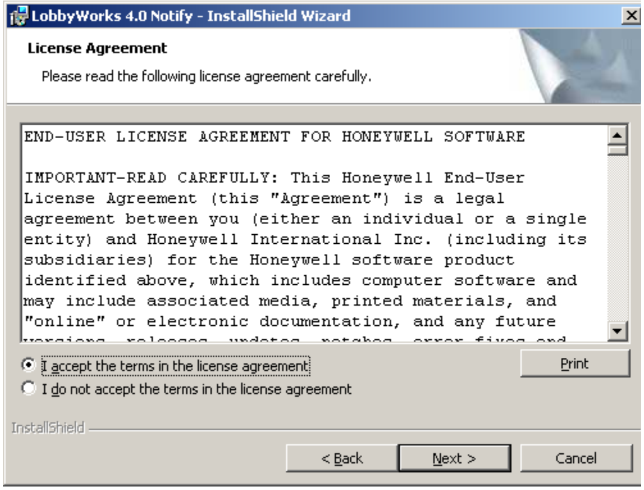
1. In the folder containing the Notify setup files, double-click **setup.exe.** The **Preparing to Install** screen appears.



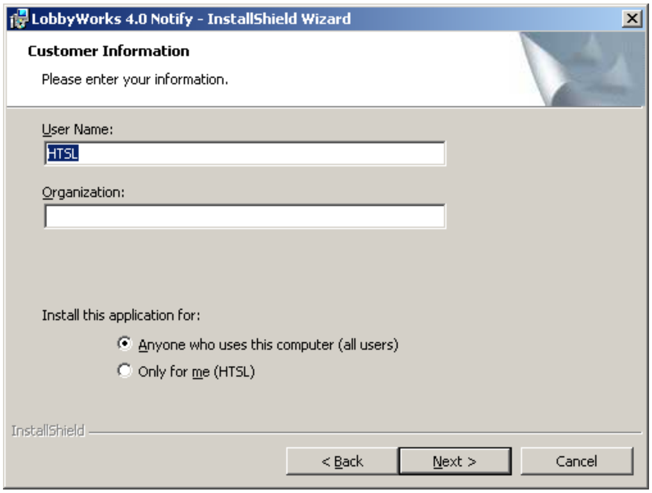
2. After Windows Installer is configured, the **Welcome** screen appears.



3. Click **Next.** The **License Agreement** screen appears.



4. To accept the license agreement, click **I accept the terms in the license agreement**. The **Next** button is enabled.
5. Click **Next**. The **Customer Information** screen appears.



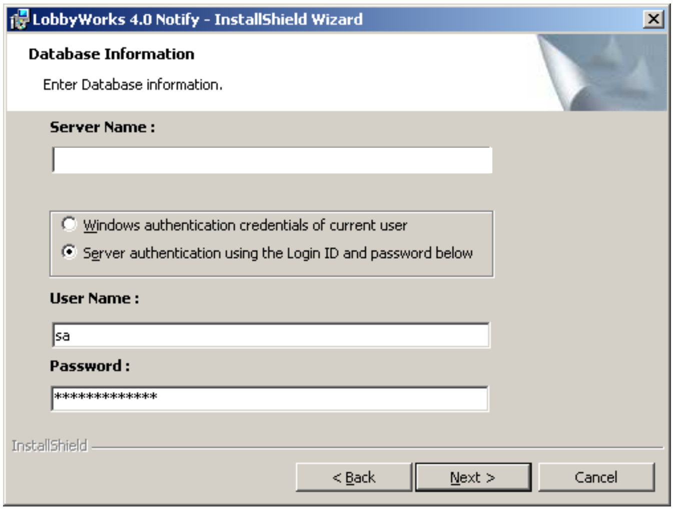
6. Type the **User Name** and **Organization**.

   Select one of the following options.

Table 8-1 Installation Options

Selection	**Description**
Anyone who uses this computer (all users)	Anyone with access rights to this computer can use Notify.
Only for me	The administrator or the current logged in user with access rights to this computer can use Notify.

7. Click **Next.** The **Database Information** screen appears.



8. In the **Server Name** textbox,` type the IP address or the machine name of the LobbyWorks database server.

   If the database and the Notify application are on the same computer, type ‘**(local)**’ in the **Server Name** text box.

   For a SQLExpress database, type one of the following:

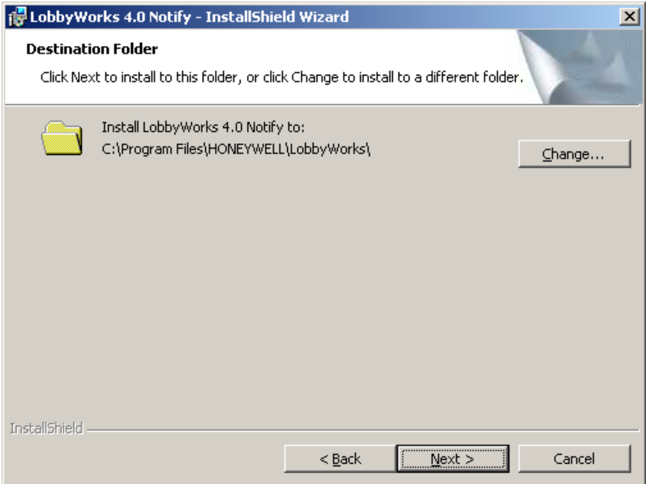
   – ‘**machine name\instance name**’

   – ‘**IP address\instance name**’

   – ‘**.\instance name**’ if the SQLExpress database and the Notify application are on the same computer

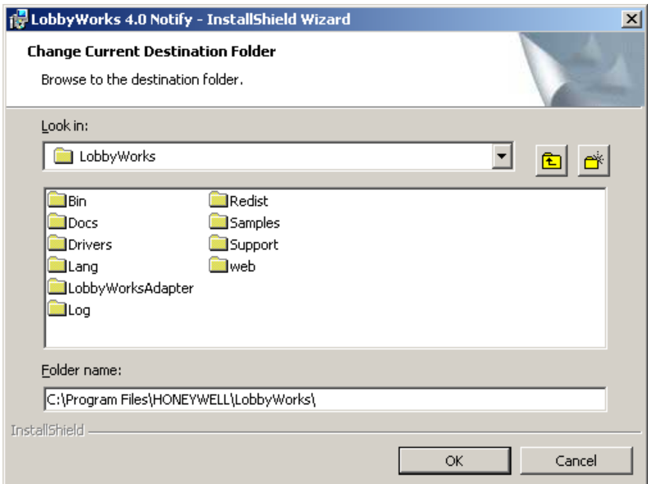
9. Select the windows authentication or the server authentication option and type the login ID and password information for the database server.

10. Click **Next**. The **Destination Folder** screen appears.



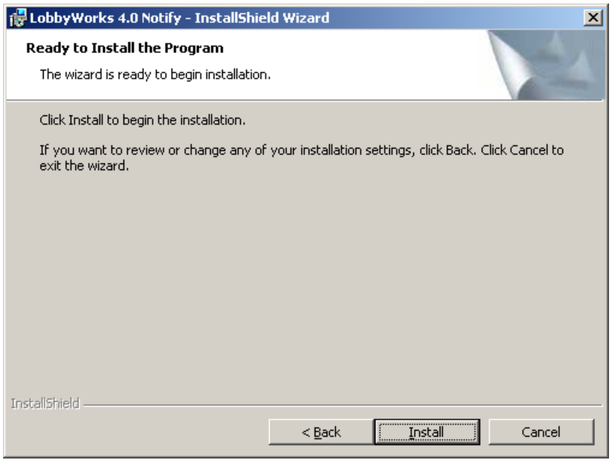
11. The default destination folder is **C:\Program Files\HONEYWELL\LobbyWorks**.

    To select a different folder, click **Change.** The **Change Current Destination Folder** screen appears.

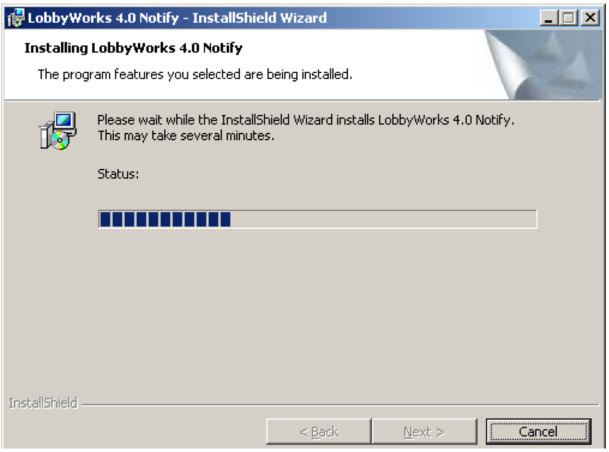


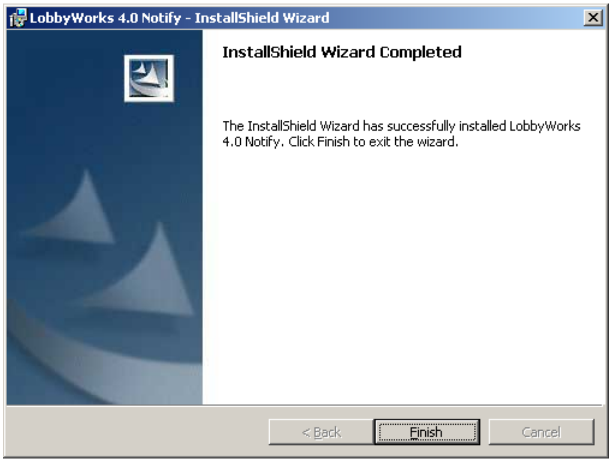
    Locate the folder where you want to install LobbyWorks Notify and click **OK**.

12. Click **Next** to continue with the installation.



13. Click **Back** to change any installation settings. Click **Install** to start installing Notify. A screen appears with a progress indicator to show the installation progress.



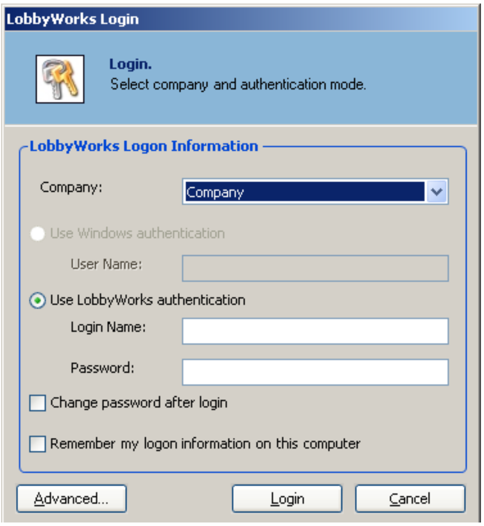


14. Click **Finish** to exit the installation setup.

Logging on to Notify

After installing the application, perform the following steps to log on to Notify.

1. Choose **Start** > **All Programs** > **Honeywell** > **LobbyWorks** > **Notify**. The **LobbyWorks Login** screen appears.



2. Select your **Company** from the list.

3. Type the LobbyWorks **Login Name** and **Password**.

   Note: Contact the LobbyWorks administrator for this information.

4. Select the **Change password after login** check box to type a new password.
5. Select the **Remember my logon information on this computer** check box to save your logon information in the database. The user name and password is saved and is available to you the next time you log on to Notify.
6. Click **Advanced** to change the LobbyWorks database server information. The **Connect** dialog box appears.
   a. Modify the **Server name** if required.
   b. Select one of the following:
      – Select **Use Windows integrated authentication**, if the credentials for logging on to Windows must be used for logging on to the database.
      – Select **Use LobbyWorks authentication,** if the SQL Server user name and password must be used for accessing the LobbyWorks database.
   c. Click **OK** to save the modified database server information.
7. Click **Login** to log on to the application.

After logging on, the LobbyWorks Notify application runs in the background and the icon is visible in the system tray. Right-click the icon to view the configuration options.

You can change the LobbyWorks database server information

For more information about the configuration options, refer to the Notify online help. To access the online help, right-click the Notify icon in the system tray and select Help from the right-click menu options.

Troubleshooting known issues with Notify

Question 1

How do I know Notify is running? Is it a service?

Answer

Notify is not a service. When the application is launched and is working properly, it runs in the background and the  icon is visible in the system tray.

Question 2

Can I make Notify a startup program?

Answer

Yes. You can use the settings option in the right-click menu in the Notify application to make Notify a startup program.

Question 3

How do I know if I am connected?

Answer

If Notify is unable to connect to the LobbyWorks database, the Notify icon in the system tray appears red in color.

Question 4

How do I troubleshoot connection issues when the server and the client are in the same domain?

Answer

When you try to log on to the Notify application, the application first tries to connect to the LobbyWorks database. When successful, it then asks for the LobbyWorks application login name and password.

If the application is unable to connect to the database, the reasons could be the following:

- Network connection issues.
- Improper database server name, user name, and/or password.

- The Windows firewall is turned ON, on the server and/or the client computer.
- SQL Server is not up and running.

Question 5

How do I troubleshoot connection issues when the server and the client are in different domains?

Answer

1. Ping the server machine name from the client.
2. Similarly, ping the client machine name from the server. You must get a response from both of them so that they can communicate with each other.
3. If the ping is successful, then try the troubleshooting steps mentioned for a server and client in the same domain.

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Part B

Configuration

A List of all the chapters in Part B

Chapter	Explains...
Chapter 1, "Introduction"	The visitor management process in LobbyWorks and introduces the key features available in the Administrator application.
Chapter 2, "User Interface"	How to log on to the Administrator and the various elements in the user interface. In addition, it includes license information for the LobbyWorks suite.
Chapter 3,"Profile Management"	How to create and manage a profile, by adding company, site, building, employee, and workstation information. In addition, it explains how to importing employee information from active directories.
Chapter 4, "Categories"	How to manage Visitor, Employee, Asset, and Delivery information. In addition, it explains how you can grant permissions to employees and visitors.
Chapter 5, ""	How to schedule the tasks.
Chapter 6,"Lists"	How to manage lists.
Chapter 7, "Additional Settings"	How to create security levels, links and custom fields. In addition, has information about Clearance Codes and ACS Access Cards.
Chapter 8, "Badges"	How to design badge templates and badges.
Chapter 9, "Badge Preprint"	How to print the badge and configuring printer.
Chapter 10, "Reporter"	How to create predefined and customized reports
Chapter 11, "Backup and Restore"	How to take backup and restore the database.
Chapter 12, "External Devices"	How to use the external devices such as scanners, printers, cameras, and so on in the LobbyWorks Administrator and Front Desk application.
Chapter 13, "Kiosk Configuration"	How to configure Kiosk using Administrator.

"Appendix A - ACS Integration"- A	ACS Integration.
"Appendix B - Active Directory"- B	Active Directory.
"Appendix C - Calendar Integration"- C	Calendar Integration.
“Glossary”	Description about commonly used terms in LobbyWorks applications.

Introduction

9

In this chapter...

LobbyWorks Overview

LobbyWorks is a visitor management system for screening and tracking visitors to a company. It helps you maintain and manage visitor information.

LobbyWorks terminologies include:

- Company: can comprise many buildings, or can be spread across multiple locations or sites
- Site: can include many buildings
- Building: can comprise different companies on various floors

This implies that LobbyWorks can be deployed to suit specific requirements.

There are eight applications in LobbyWorks and each of them help in various phases of visitor tracking.

- **Administrator**: used to configure and control the working of all the applications in the suite
- **Front Desk**: used by the personnel to enter visitor, asset and delivery information and print badges for them
- **Badge Preprint**: used by the personnel to print badges
- **Kiosk**: used by visitors to self-register
- **Notify**: used by the front desk personnel and hosts to communicate with each other about the arrival of visitors and accepting/declining them
- **Web Center**: is a web-application used by the employees to pre-register and manage their visitors information
- **Reporter**: used to generate reports
- **Scheduler**: used to schedule the frequently performed tasks by the Front Desk and Administrator

In addition to tracking and maintaining visitor information, LobbyWorks can monitor employees' assets and their deliveries.

A typical visitor tracking process involves the following steps, which is performed through each of the LobbyWorks applications.

1. Pre-register the visitor: An employee (host), who is expecting a visitor, enters the details of the visitor in advance in the Web Center application.
2. Register the visitor: When the visitor arrives, the front desk personnel enter the visitor details in the Front Desk application. The visitor's business card or driving license can be scanned to automatically fill the information.

   OR

   Visitor self-registers: The visitor can enter the visit details in the Kiosk, normally kept at the lobby.

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3. Notify the host: After entering the visitor information, the Front Desk application notifies the host about the visitor's arrival. The host can authorize the visitor’s arrival or decline entry to the visitor.
4. Sign-in the visitor: The front desk personnel print a badge for the visitor, which contains visitor details, the purpose of the visit and the visit duration.

LobbyWorks Administrator

The LobbyWorks Administrator enables you to configure and maintain the other applications in the suite. In addition, it provides an interface to view and edit company, site and employee information.

Settings and Configuration

The main tasks in LobbyWorks Administrator are the following:

- Configuring the Kiosk
- Configuring the Front Desk
- Miscellaneous tasks, like adding data and designing badges

Kiosk Configuration

Table 9-1

Task	Refer to...
Enable name matching, touch screen features in the Kiosk.	“Set General Kiosk Properties“ on page 36 in the Profile Management chapter.
Select the buttons to be displayed in the Kiosk UI.	“Set Additional Kiosk Properties“ on page 34 in the Profile Management chapter.
Provide the greeting message and the specifications for name matching.	“Providing Kiosk Settings“ on page 5 in the Profile Management chapter.
Display links to websites useful to visitors.	“Links“ on page 5 in the Additional Settings chapter.

Front Desk Configuration

Table 9-2

Task	Refer to...
Select the fields to be displayed in the Front Desk UI.	"Customize Field Definitions" on page 12 in the Categories chapter.
Create custom fields to be displayed in the Front Desk UI.	"Custom fields" on page 7 in the Additional Settings chapter.

The tasks listed in the table determine the look and feel and the features available in Front Desk. The settings in the Administrator enable you to configure Front Desk to suit your requirements.

Refer to the chapters in this guide to configure the Front Desk using the Administrator settings.

Miscellaneous Tasks

Table 9-3 Tasks you can perform using Administrator

Task	Refer to...
Add companies, sites, and buildings to represent the physical premises.	"Company" on page 2, "Site" on page 11 and "Building" on page 13 in the Profile Management chapter.
Add the employee information individually, or import the data in bulk.	"Employee" on page 15 in the Profile Management chapter.
Create sub-categories for the predefined visits, employees, assets, and deliveries categories and set unique rights for them.	"Visit category" on page 2, "Employee category" on page 15, the Categories chapter.
Design templates and assign them to badges, to create badges specific to a company, site and category.	"Configure layout templates" on page 1 and "Configure badges" on page 1 in the Badges chapter.

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Task	Refer to...
Manage the password and logon screens.	"Logging On to Administrator" on page 2 and "License manager" on page 11 in the User Interface chapter.

User Interface

10

In this chapter...

Overview

This chapter describes how to log on to the LobbyWorks Administrator application, and how to use its various elements. The elements in the Administrator user interface include the title bar, menu bar, tool bar, status bar, navigation area, and display area.

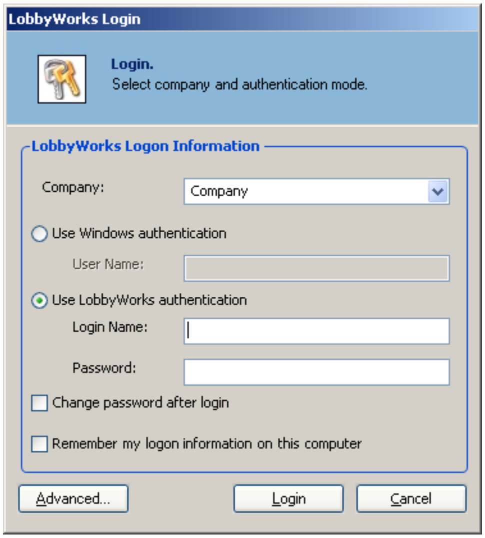
In addition, this chapter gives you information about configuring the logon password in the Administrator application.

Logging On to Administrator

You can use the default user name and password to log on to the application. The administrator has full rights to configure the default settings.

To log on to Administrator:

1. Choose **Start > Programs > LobbyWorks > Administrator.** The **LobbyWorks Login** dialog box appears.



2. Select your **Company**.
3. Select one of the following:
   - Select **Use Windows integrated authentication**, if the credentials for logging on to Windows must be used for logging on to the database.
   - Select **Use LobbyWorks authentication,** if the SQL Server user name and password must be used for accessing the LobbyWorks database.

4. Type the **User Name** used for Windows authentication, if **Use Windows authentication** is selected.

   OR

   Type the **Login Name** and **Password**, if **Use LobbyWorks authentication** is selected.

   Note: If you are logging on to the Administrator for the first time, type the following:

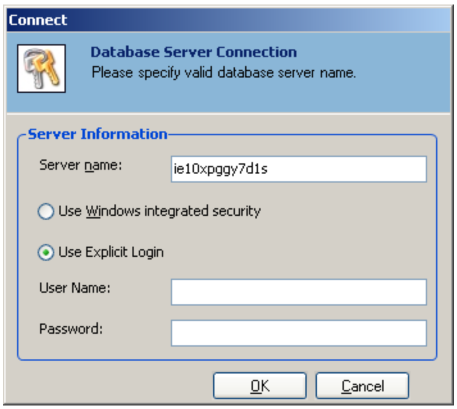
   a. Login Name as **administrator**.

   b. Password as **guest**.

5. Select the **Change Password after Login** check box to change the current password, immediately after logging on to the application.

6. Select the **Remember my logon information on this computer** check box to automatically log on to the system the next time.

7. If you want to change the database server from where the data is accessed, click **Advanced**. The **Connect** dialog box appears.



   a. Type the **Server name** in which you have installed the LobbyWorks database.

   b. Select one of the following:

      – Select **Use Windows integrated security**, if the credentials for logging on to Windows must be used for logging on to the database.

– Select **Use Explicit Login**, if the SQL Server user name and password must be used for accessing the LobbyWorks database.

c. Click **OK** to change the server settings and close the window.

8. Click **Login** in the **LobbyWorks Login** dialog box. The Lobbyworks Administrator user interface is displayed.

Note: If the **Change Password after Login** check box is selected, the **Change Password** window appears.

a. Type the **Old Password**, **New Password**, and confirm the new password by re-entering it in **Confirm New Password**.

b. Click **Save** to log on to the application.

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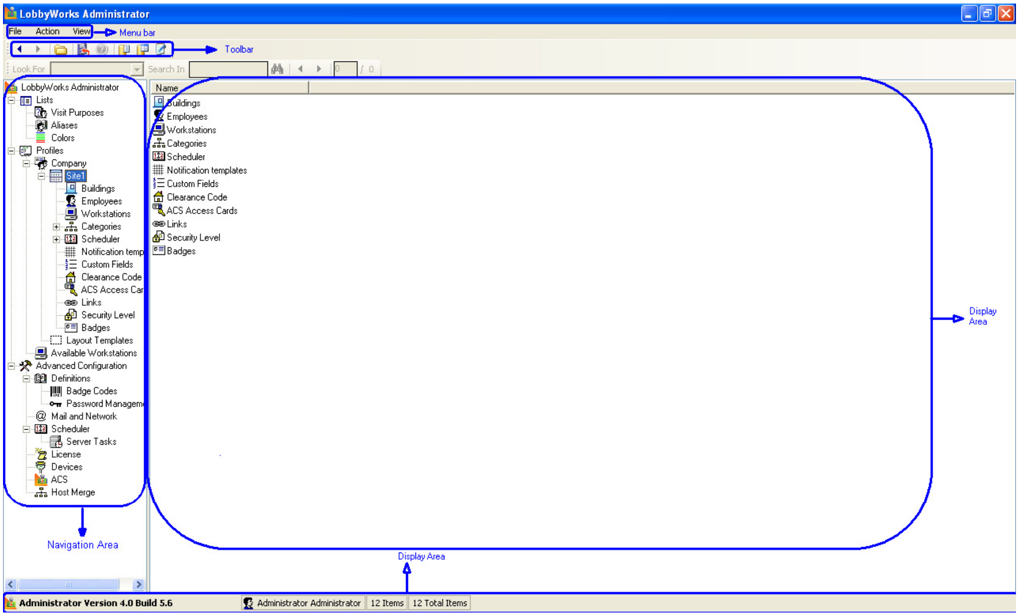
About the Administrator user interface

The Administrator user interface is divided into five parts namely Menu bar, Tool bar, Status Bar, Navigation area, and Display area.



- **Menu bar** – Contains three menu options that enables you to exit from the application, access the help, and change the view of the display in the display area.
- **Tool bar** – Contains a list of icons that enables you to view the help, perform back up and restore options, and so on.
- **Navigation area** – Displays all the tree elements in a tree structure.
- **Display area** – Displays the detailed information of the item selected in the Navigation area.

Menu and Tool Bars

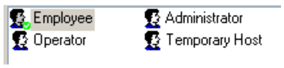
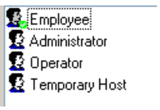
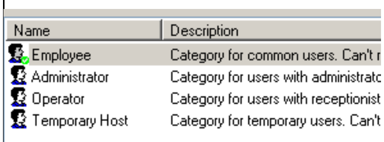
Menu Bar

The menu bar appears on the top of the user interface. It contains three menus; File, Action, and View. Click the menu to view the menu options. Using the menu options you can perform the following actions:

- Quit the application - Choose **File > Exit**.

- About the application - Choose **File** > **About**.
- To disconnect the current user from the application - Choose **Action** > **Disconnect.**
- Change the view - Choose **View** and select the desired view option.

The available views are:

View Option	**View**	**Description**
Large Icons		Displays the list of items as large icons.
Small Icons		Displays the list of items as small icons.
List		Displays the items in a list.
Details		Displays the items in a list with details. By default, the **Details** view is selected. **Note:** You can click the column title to sort the entities in the ascending order. Click the column title again to sort them in the descending order.

Tool Bar

The tool bar appears below the menu bar. The tool buttons help you traverse through the menus in the navigation pane and perform regular operations like data backup, cleanup and restoration.

The following table describes the tool buttons:

Tool button		Description
	Back	Enables you to navigate to the previously selected menu
	Forward	Enables you to navigate to the recently selected menu
	Up One Level	Enables you to move one level higher
	Export	Exports the selected contents in the right pane to a text file
	Help	Displays the help topic for the selected entity
	Backup Cleanup Database	Enables you to backup and cleanup the database
	Restored Database	Enables you to restore the database you backed up earlier
	Audit Log Events	To export the logged events to a CSV file from the database

You can use the **Look For** list to search for the following criteria to locate information for an employee.

- Buildings
- Category
- Department
- E-mail
- First Name
- Last Name
- Phone
- User Name

You can use the **Look For** list to search for the following criteria to locate information on a workstation.

- Description

- Name

Use the following search options to locate information for an employee or a workstation.

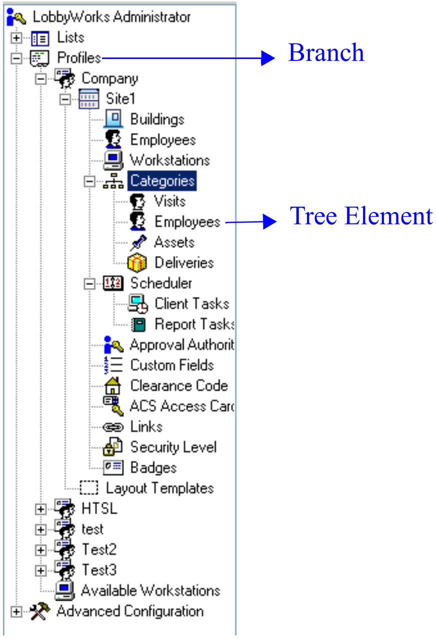
- **Look For** - Enables you to look for a criteria
- **Search in** - Enables you to search information on a criteria
- Click to navigate between the pages
- Type the page number to view details
- Press Enter to start search

Status Bar

The Status Bar at the bottom of the Administrator user interface displays the purpose of the selected menu.

Navigation Area

The navigation area appears on the left of the user interface. It shows all the available options within Administrator in a tree structure. In the tree, you can click the ⊞ sign to expand the branch and click the ⊟ sign to collapse the branch. You can also double-click the branch to expand or collapse it.



When you click a tree element (a branch or any item in the tree), the list of available entities for the selected branch appears in the display area. For example, if you click **Categories**, the list of available categories appears in the display area.

You can right-click the tree element to perform the add, edit, and delete the entity for the selected element. The right-click options depend on the selected element property. For example, if the list of entities of the selected element is fixed, the right-click option may not contain the Add option.

Display Area

The display area appears on the right of the UI. It displays the entities for the selected element in the navigation area. The entities in the display area can be viewed as:

- Large Icons
- Small Icons
- List
- Detailed List

To change the view of the entity display in the display area, refer to “Menu Bar“ on page 5 in this chapter.

To perform actions on a selected entity, right-click the entity in the display area and select the required option from the right-click menu. The list of right-click options depends on the entity property. For example, if you right-click the entity of

Categories, the right-click options would be Add and Help. If you right-click the entity of **Visits**, the right-click options would be Add, Modify, Delete, Copy, and Help.

Configuring the password

In LobbyWorks, you can configure the password for:

- Its expiry date
- Password length
- Locking a password after a series of wrong password attempts

To configure the password:

1. Expand **Advanced Configuration**, and then **Definitions**.
2. Click **Password Management**. The password management is listed in the display area.
3. Right-click **Password Management** and click **Modify**. The **Password Management** dialog box appears.

4. Select or clear the following password management check boxes:

Option	Description
Password expires after	Select this check box and specify the number of days after which the password expires.
Password must be atleast	Select this check box and specify the minimum number of characters required in the password.

Option	Description
Lock Password	Select this check box to lock the password at the following two different scenarios: **Permanently lock user after:** Select this option and enter the maximum number of password attempts allowed to the user. On exceeding the maximum number of password attempts, the access to the application is denied. **Temporarily lock an account:** Select this option and enter the period in mins or hours for which password remains locked. Also, enter the maximum number of attempts allowed to the user. On exceeding the maximum number of password attempts, the access to the application is locked for the specified duration.

License manager

The License Manager helps you install and manage the licensing for the LobbyWorks server and client applications. When required, it also enables you to terminate the license. You can also transfer the license to another computer after termination.

Installing the license involves

1. Generating the Host ID file.
2. Obtaining the License Certificate
3. Installing the License Certificate

Note: You can use the LobbyWorks Administrator application without a license. However, to use the other applications and features in the LobbyWorks suite, you must procure the appropriate license and then install the license certificate on the LobbyWorks server.

Installing the License

Step 1: Generating the Host ID

The host ID file uniquely identifies the system on which it was generated. The generated host ID file has the file extension **.hid**.

To generate the host ID

1. In the navigation area, expand **Advanced Configuration**.

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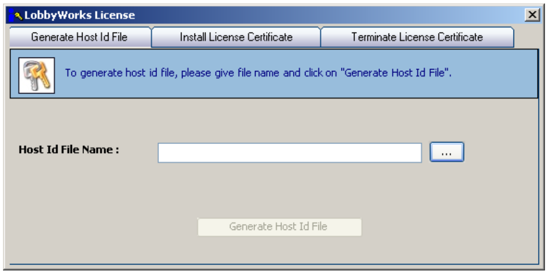
2. Right-click **License**, and then click **Add**. The **LobbyWorks License** dialog box appears.

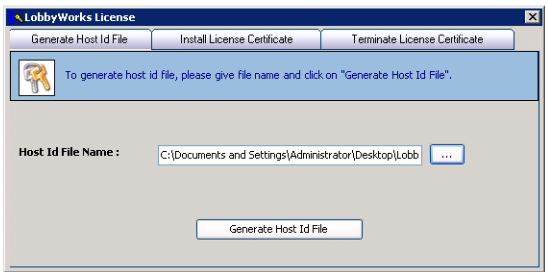


3. On the **Generate Host Id File** tab, click the ellipses button ... to select the location where the host ID file must be saved. The **Save As** dialog box appears.

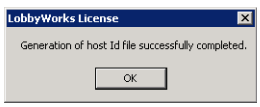
   a. Browse to the location where the file must be saved.

   b. In **File name**, type a name for the host ID file and click **Save**. The file name with the location is displayed in the **Host Id File Name** box.

4. Click **Generate Host Id File**.



A confirmation message appears indicating that the host ID file is generated.



Step 2: Obtaining the License Certificate

1. Contact the product vendor to obtain the voucher number.
2. Zip the generated Host ID file and assign the password as ‘password’.
3. In the subject line of the e-mail, specify the voucher number in the format “VOUCHID: Voucher number”.

For example, the subject line for the e-mail can be "**VOUCHID: 1234-33254-36542**".

4. Send the e-mail to the address License.Server@honeywell.com.

   You will receive the license certificate as a zipped attachment with a password.

5. Unzip the file using the password 'password' to access the license certificate.
6. Save the license certificate on the computer.

Note: The reply e-mail from the license server is also sent to the e-mail addresses which were in the Cc list of your e-mail.

If the e-mail is not in the specified format, the license server is unable to process the request. As a response, you might receive an e-mail with an error message which can help you resolve the issue.

For information about the error messages and their possible causes, refer to the section "License Server Error Messages" in this chapter.

Step 3: Installing the License Certificate

The license certificate can be installed only using the Administrator application in which the Host ID file was generated.

To install the license certificate, you must:

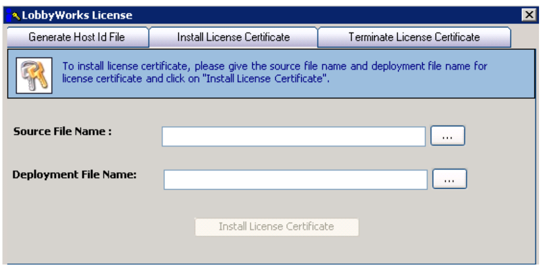
- Specify the location where you have saved the license certificate.
- Specify a location on the server where a copy of the license certificate (deployment file) must be saved.

  LobbyWorks retrieves the license information from the deployment file, as and when required.

To install the license certificate

1. In the navigation area, expand **Advanced Configuration**.
2. Right-click **License**, and then click **Add**. The **LobbyWorks License** dialog box appears.

.



3. Click the **Install License Certificate** tab.

4. Click the ellipses button ... next to the **Source File Name** box. The **Open** dialog box appears.

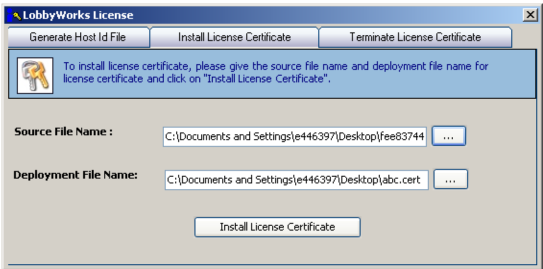
   a. Browse to the location where the license certificate is saved.

   b. Click the **.cert** file and then click **Open**. The file name with the location is displayed in the **Source File Name** box.

5. Click the ellipses button ... next to the **Deployment File Name** box. The **Save As** dialog box appears.

   a. Browse to a location on the server where the license certificate must be saved.

   b. In **File name**, type a name for the license certificate and click **Save**. The file name with the location is displayed in the **Deployment File Name** box.



6. Click **Install License Certificate**.

Note: The **Install License Certificate** button is enabled only after the source and deployment file locations are selected.

A confirmation message appears indicating that the license certificate is installed.

Upgrading the License

1. Send an e-mail with the base voucher number to the LobbyWorks product manager.

   You will receive an e-mail from the product manager with the upgrade voucher number.

2. Send an e-mail to the address License.Server@Honeywell.com with the upgrade voucher number in the subject line "VOUCHID: Vouchernumber".

You will receive an e-mail from the license server with the upgrade license certificate.

If the e-mail is not in the specified format, the license server is unable to process the request. As a response, you might receive an e-mail with an error message which can help you resolve the issue.

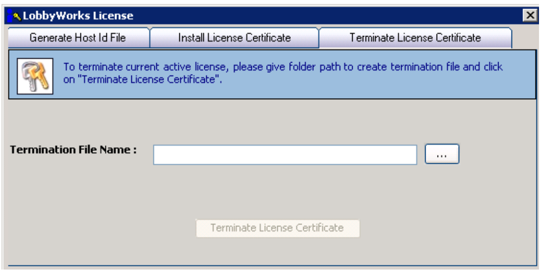
For information about the error messages and their possible causes, refer to the section “License Server Error Messages” in this chapter.

Terminating the License

You can terminate the license when you do not want to use LobbyWorks or when you want to transfer the license to a different computer.

To terminate the license

1. In the navigation area, expand **Advanced Configuration**.
2. Right-click **License**, and then click **Add**. The **LobbyWorks License** dialog box appears.
3. Click the **Terminate License Certificate** tab.



4. Click the ellipses button ... next to the **Termination File Name** box. The **Save File** dialog box appears.
   a. Browse to a location on the server where the license certificate must be saved.
   b. In **File name**, type a name for the termination file and click **Save**. The file name with the location is displayed in the **Termination File Name** box.
5. Click **Terminate License Certificate** to generate the termination file.

   The termination file has a **.term** extension.

Transferring the License

Before you transfer a license to a different computer, you must terminate the existing license.

For information about generating the termination file, refer to the section "Terminating the License" in this chapter.

To transfer the license

1. Generate the host ID file for the computer to which the license is to be transferred. For information about generating the host ID file, refer to the section "Step 1: Generating the Host ID" in this chapter.
2. Zip the Host ID and the termination file together, and assign a password 'password'.
3. In the subject line of the e-mail, specify the voucher number in the format "VOUCHID: Voucher number".

   For example, the subject line for the e-mail can be "VOUCHID: 1234-33254-36542".
4. Send the e-mail to the address License.Server@honeywell.com.

   You will receive the license certificate as a zipped attachment with a password.
5. Unzip the file using the password 'password' to access the license certificate.
6. Save the license certificate on the computer.

Note: The reply e-mail from the license server is also sent to the e-mail addresses which were in the Cc list of your e-mail.

If the e-mail is not in the specified format, the license server is unable to process the request. As a response, you might receive an e-mail with an error message which can help you resolve the issue.

For information about the error messages and their possible causes, refer to the section "License Server Error Messages" in this chapter.

License Server Error Messages

Message 1:

Sorry, the Voucher ID you entered is InValid. Please enter a Valid Voucher ID.

Causes

An invalid voucher ID is sent in the e-mail request.

A typographical error in entering the Voucher ID.

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The voucher ID received does not exist in the database.

Message 2:

Please give the valid Host ID file.

Causes

The attached Host ID file is unzipped.

The attached Host ID file is zipped but not protected with the password 'password'.

The attached Host ID file is corrupt.

Message 3:

The License is already generated for a different Host ID.

Cause

The voucher ID that was sent, was used for generating the license for a different host ID.

Message 4:

Base License for this file is not generated yet.

Cause:

The voucher ID that was sent, may be for the upgrade license. However, if a base license is not present, an upgrade license cannot be generated.

The base license is necessary to generate the upgrade license.

Message 5:

The product is InActive in license server. You cannot generate this license. Kindly contact the product vendor/product focal for further details.

Cause

A product can be made inactive in the license server, based on a request from the product administrator. When an e-mail is received, with the voucher number for a product which is inactive in the license server, this error message is sent as a reply.

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Message 6:

No Reply from License server

Cause:

Only e-mails with subject lines starting with the string "VOUCHID:" are processed by the license server.

E-mails which do not start with the string "VOUCHID:" in the subject line, are ignored by the license server and no action is performed on these e-mails.

Message 6:

Error code 11 LicenseGenerationdate Greater than Current Date.

Cause:

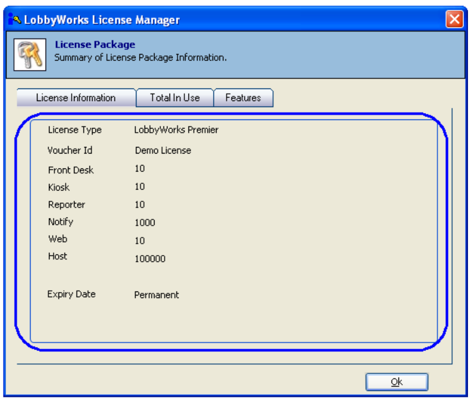
The date in the computer in which you have installed the Lobbyworks Administrator is not set to the current date time.

License Information

You can view the details of the license installed in your computer such as license type, voucher ID, number of hosts, number of kiosks, and so on.

To view the license information

1. In the navigation area, expand **Advanced Configuration**.
2. Right-click the license, and then select **View**. The **LobbyWorks License Manager** dialog box appears.



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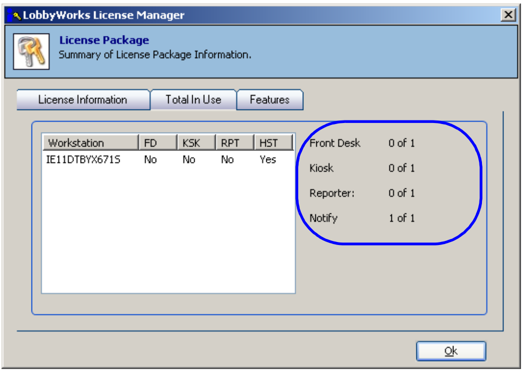
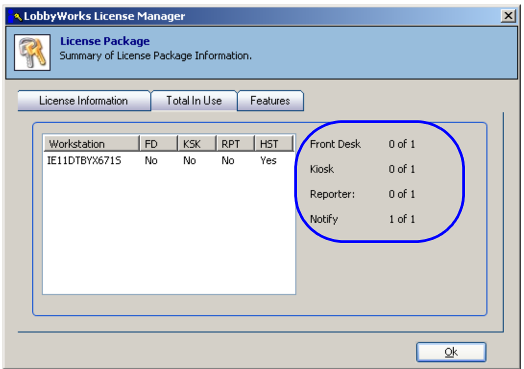
3. On the **License Information** tab, you can view the details like license type, voucher ID, number of applications supported by the license and so on.



4. On the **Total In Use** tab, you can view the number of applications such as Front Desk, Kiosk, and so on supported by the license type installed on your system by LobbyWorks Administrator.



5. On the **Features** tab, you can view the list of features supported by license type.

FAQs about Licensing

Question

Where does the LobbyWorks suite of application refer to the license, after installing the license?

Description

The license information is stored in both the file and in the database. It refers to the computer in which you have installed the license(on the server).

Profile Management

11

In this chapter...

Overview

The LobbyWorks Visitor Management System can monitor and track visitors entering a premises. The premises can be a building, company, site, a floor, or it can be a company spread over multiple locations.

A **Profile** can be created for each premises in LobbyWorks. Creating profiles enables you to effectively manage the premises information, in addition to, maintaining and tracking the details of employees and their visitors.

Company

A Company in LobbyWorks is the topmost entity in the Profile. Sites, buildings and employees are defined for the company.

The definition of a company can vary in LobbyWorks. It can be any of the following:

- company with business units spread over multiple locations (or sites in LobbyWorks)
- premises enclosing multiple companies
- company with units based in different buildings within the same premises

When the Administrator is installed, a company is created by default. You can modify the settings for the default company and also add companies to the **Profile**.

Adding a Company

1. Right-click **Company** in the navigation area, and select **Add**.

   OR

   Select **Company** in the navigation area, right-click in the display area, and select **Add**.

   OR

   Select **Profiles** in the navigation area, right-click **Company** in the display area and select **Add**.

   The **Company Information** dialog box appears.

2. In the **Company Information** dialog box, click the **General** tab.

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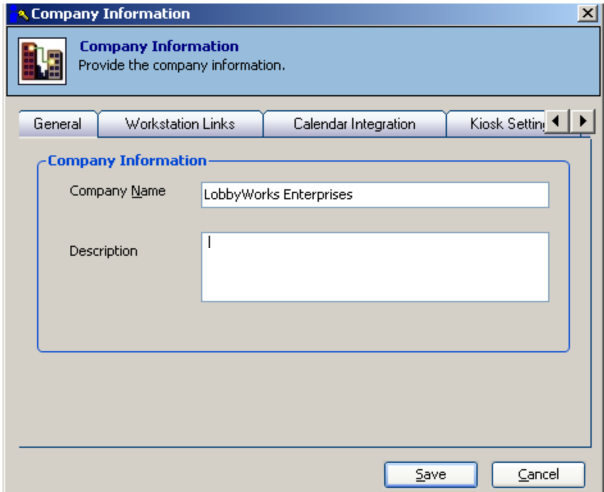

3. Type the **Company Name**.
4. Type a **Description** for the company.
5. Click **Save** to add the company to the list of companies.

For every company you can:

- Assign workstations, such that the Front Desk and Kiosk applications running on them, register visitors only for the selected company
- Configure LobbyWorks to access employees' calendar meetings. From the calendar, the visitors attending a meeting can be identified and pre-registered automatically
- Provide the settings for the Kiosk
- Provide the active directory details to import employee information
- Set Logon details options such as
  - **Windows based authentication** where you can provide windows based credentials to logon to the LobbyWorks application.
  - **LobbyWorks internal authentication** where you can provide the LobbyWorks credentials, if you have created an account using LobbyWorks application.

Note: Click ◂ or ▸ to view the required, hidden tab.

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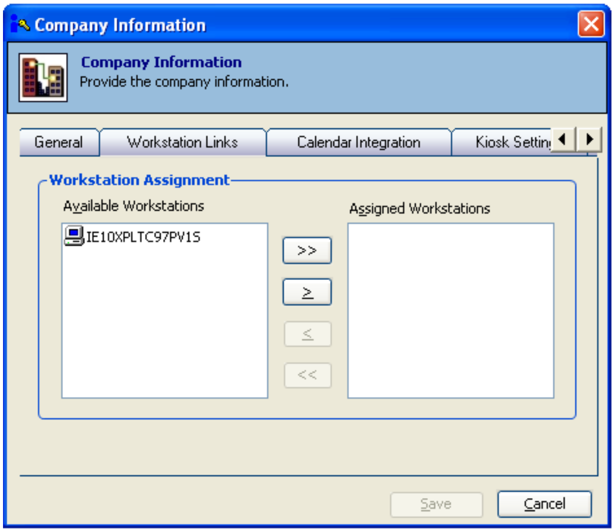
Assigning Workstations

You can assign workstations to a company, building, and/or site. Assigning workstations enables you to track information about visitors related only to the specific company, building, or site.

Example: Workstation X is assigned to company Y. The personnel using the Front Desk on workstation X can register visitor only for company Y.

To assign workstations to the company:

1. In the **Company Information** dialog box, click the **Workstation Links** tab.



2. Select the workstation from the list of **Available Workstations**.
3. Click  to move the selected workstation to the **Assigned Workstations** list.

   OR

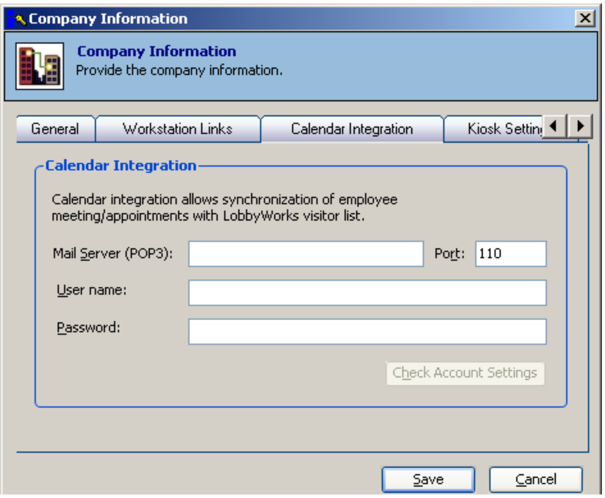
   Click  to move all the available workstations to the **Assigned Workstations** list.
4. Click **Save** to save the workstation settings.

Integrating Calendar Information

You can provide the mail server connection settings in the **Calendar Integration** tab. This information enables LobbyWorks to check appointments scheduled for employees in the calendar, and identify the visitors arriving for them. After identifying the visitors, LobbyWorks automatically pre-registers them.

To provide the mail server details:

1. Click the **Calendar Integration** tab in the **Company Information** dialog box.



2. Type the **Mail Server (POP 3)** and **Port** address.
3. Type the **User name** and **Password,** which LobbyWorks can use to automatically connect to the POP3 account.
4. Click **Check Account Settings** to try connecting to the POP3 account using the information provided.
5. Click **Save** to save the mail server information.

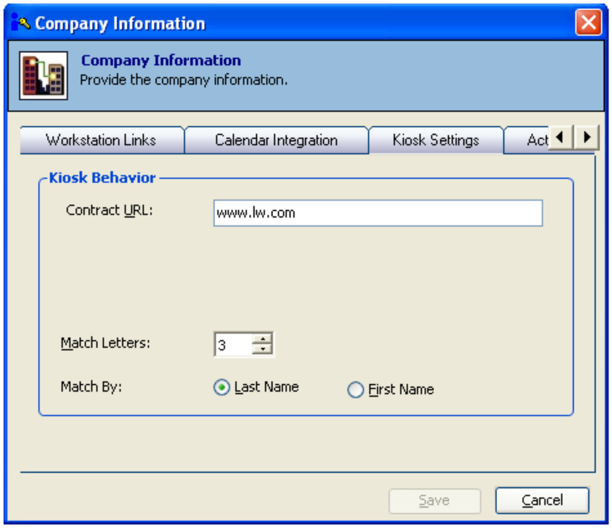
Note: For more information on Calendar Integration, see Appendix C - Calendar Integration - C.

Providing Kiosk Settings

The Kiosk helps visitors self-register. The **Kiosk Settings** tab helps you configure the Kiosk properties.

To type the settings for the Kiosk:

1. In the **Company Information** dialog box, click the **Kiosk Settings** tab.



2. Type the following information:

Option	Description
Contract URL	The URL appears in the Kiosk application, before the visitor enters the details to register the visit.
Match Letters	The number of characters the visitor needs to enter to fill the host information.
Match By	The **Match Letters** are to be matched with the **First Name** or **Last Name**.

3. Click **Save** to save the Kiosk settings.

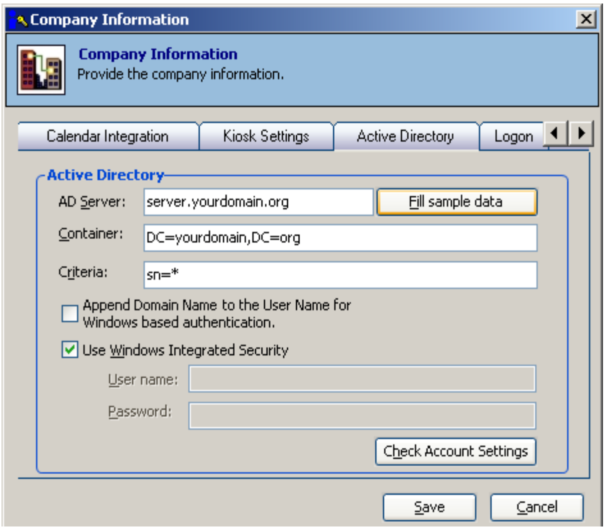
Setting Active Directory Information

Each company in LobbyWorks has its list of employees. The employee information can be imported from the company's active directory or added manually. The connection details for the active directory can be specified in the **Active Directory** tab.

For adding an employee manually, refer to "Adding an Employee" on page 15 in this chapter.

To set the active directory information:

1. Click the **Active Directory** tab in the **Company Information** dialog box.



2. In **AD Server**, type the active directory's server details.
3. In **Container**, type the LDAP statement.
4. In **Criteria**, type the criteria.
5. Click **Fill sample data** to fill the fields with sample information.
6. Select the **Append Domain Name to the User Name for Windows based authentication** check box to use the windows based authentication.
7. Select the **Use Windows Integrated Security** check box to logon using the Windows username and password.
8. Click **Check Account Settings** to verify the user credentials you have provided in step 7.
9. Click **Save** to save the active directory settings.

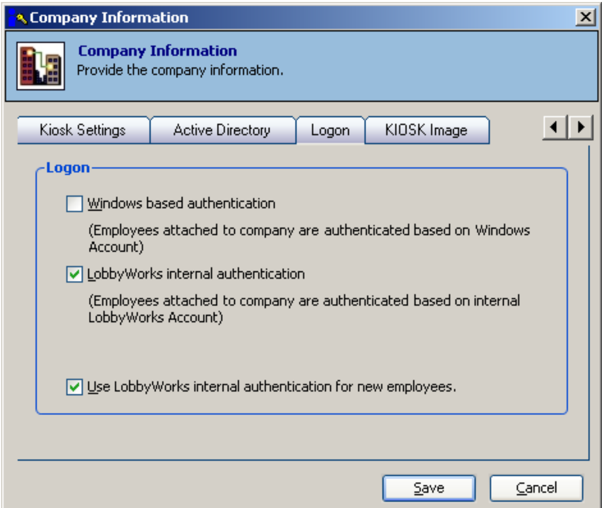
Note: For more information on active directory settings see Appendix B - Active Directory-B.

Setting Logon Details

You can logon to LobbyWorks using the Windows account user name or the LobbyWorks account user name and password.

To set the logon information:

1. Click the **Logon** tab in the **Company Information** dialog box.



2. Select the following check boxes based on requirement:.

Option	Description
Windows based authentication	Uses windows authentication to log on to LobbyWorks Administrator
LobbyWorks internal authentication	Uses LobbyWorks internal authentication to log on to Administrator.
LobbyWorks internal authentication for new employees	Creates LobbyWorks user name and password for new employees, irrespective of selecting windows based authentication.

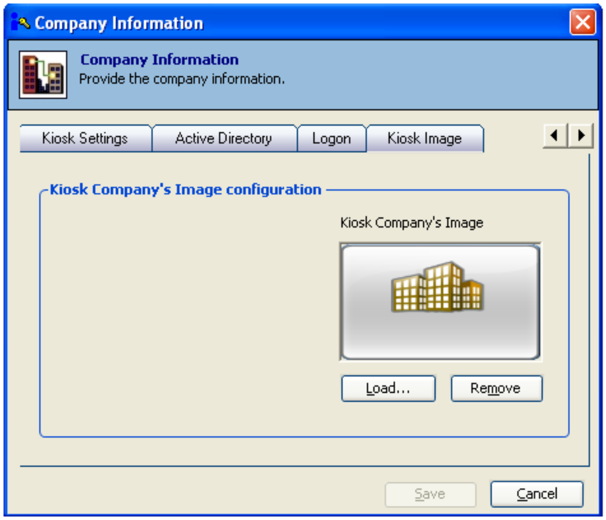
3. Click **Save** to save the logon details.

Setting the Kiosk Image

This tab enables you to load the kiosk company's image to LobbyWorks.

To set the logon information:

1. Click the **Kiosk Image** tab in the **Company Information** dialog box.



2. Click **Load**. The **Open** dialog box appears.
3. Browse to the location where the company's image is saved.
4. Click **Open.** The company image is loaded successfully.
5. To choose a different image, click **Remove**, and then click **Load** to select a new image.

Editing a Company

1. Right-click **Company** in the navigation area, and select **Modify**.

   OR

   Select **Company** in the navigation area, right-click in the blank space in the display area and select **Modify**.

   OR

   Select **Profiles** in the navigation area, right-click **Company** in the display area and select **Modify**. The **Company Information** dialog box appears.
2. Make the required changes to the company settings.
3. Click **Save** to save the changes and close the **Company Information** dialog box.

Deleting a Company

1. Right-click **Company** in the navigation area, and select **Delete**.

   OR

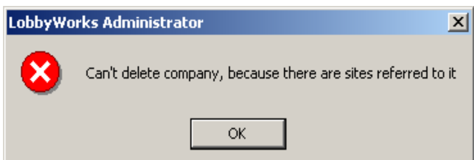
   Select **Company** in the navigation area, right-click in the blank space in the display area and select **Delete**.

   OR

   Select **Profiles** in the navigation area, right-click **Company** in the display area and select **Delete**. A confirmation message appears.
2. Click **Yes** to delete the selected company.

Notes:

- At any point in time, all the companies can never be deleted from the LobbyWorks Administrator. One company has to be present in the LobbyWorks database.
- The following error message appears, when the company has sites configured within it.



To delete such companies, first delete the sites within it.

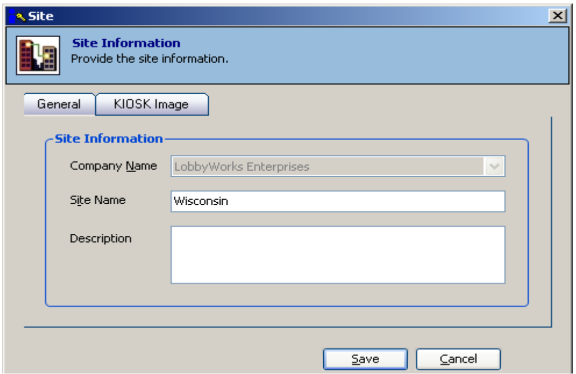
For deleting a site, refer to "Deleting a Site" on page 12, in this chapter.

Site

A site is configured after completing the settings for the Company. When a company is created, by default a site named **Site1** is automatically created. The existing site information can be edited and more sites can be added to the company.

Adding a Site

1. Expand **Company**, right-click **Site1**in the navigation area and select **Add**. The **Site** dialog box appears.



2. Select the **Company** to which the site is to be added.
3. Type the name of the site in **Site Name**.
4. Type a **Description**.
5. Click **Save** to create the site.

Setting the Kiosk Image

This tab enables you to load the kiosk company's image to LobbyWorks.

To set the logon information:

1. Click the **Kiosk Image** tab in the **Company Information** dialog box.

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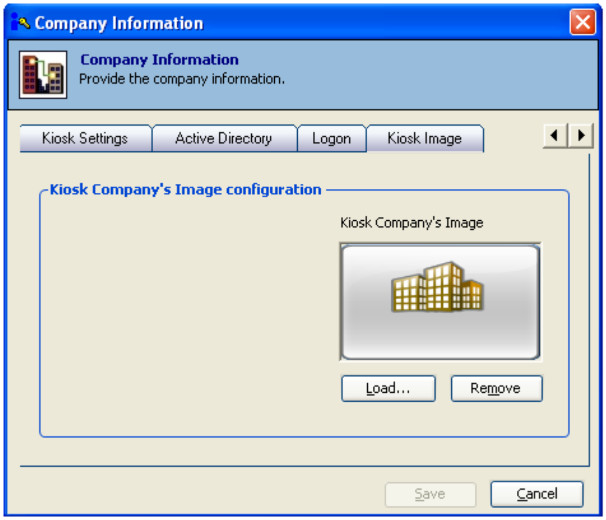


2. Click **Load**. The **Open** dialog box appears.
3. Browse to the location where the company's image is saved.
4. Click **Open.** The company image is loaded successfully.
5. To choose a different image, click **Remove**, and then click **Load** to select a new image.

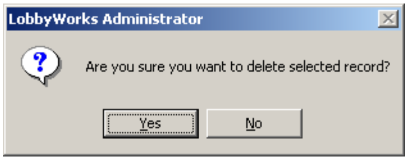
Editing a Site

To edit a site:

1. Right-click **Site1** in the navigation area, and select **Modify**. The **Site** dialog box appears.
2. Select a different **Company,** if required.
3. Change the **Site Name** and **Description**.
4. Click **Save** to complete the modification.

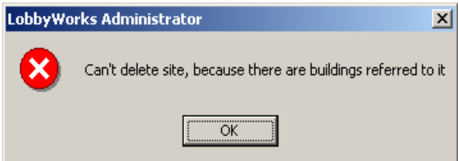
Deleting a Site

1. Right-click **Site1** in the navigation area, and select **Delete**. A confirmation message appears.



2. Click **Yes** to delete the selected site.

Note: If the site you are deleting, has buildings configured within it, then the following error message appears:



To delete such sites, first delete the buildings within it.

For deleting a building, refer to "Deleting a Building" on page 14 in this chapter.

Building

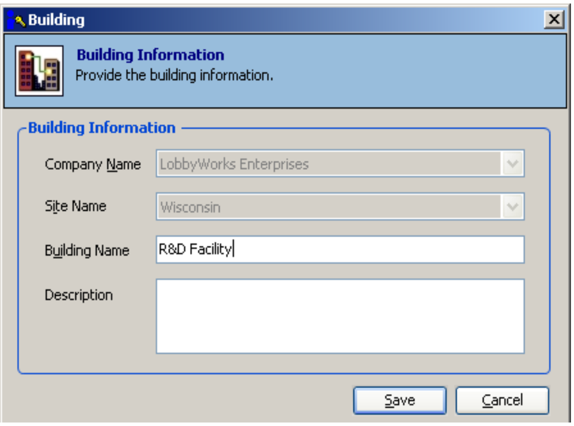
A building is configured after completing the settings for the Company and Site. When a company is added, a site **Site1** and a building **Building1** are created by default, within the company. Similarly, each time a site is added, **Building1** is created by default. The existing building information can be edited and more buildings can be added to the site.

Adding a Building

1. Right-click **Buildings** in the navigation area and select **Add**. The **Buildings** dialog box appears.

   OR

   Right-click **Building1** in the display area, and select **Add**.



Tip: Select **Buildings** in the navigation area, right-click in the blank space in the display area, and select **Add** to open the **Buildings** dialog box.

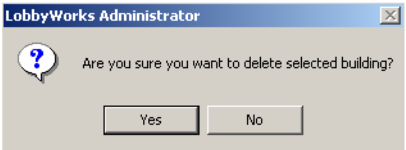
2. Select the **Company** to which the building is to be added.
3. Select the name of the site in **Site Name**.
4. Type the **Building Name**.
5. Type a **Description**.
6. Click **Save** to create the building.

Editing a Building

1. Right-click **Building1** in the navigation area and, select **Modify**. The **Buildings** dialog box appears.
2. Select a different **Company,** if required.
3. Change the **Site Name, Building Name** and **Description**.
4. Click **Save** to complete the modification.

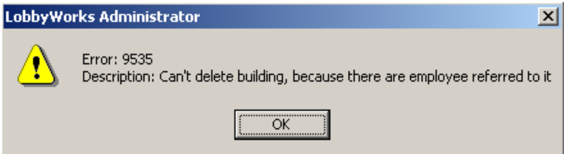
Deleting a Building

1. Right-click **Building1** in the navigation area, and select **Delete**. A confirmation message appears.



2. Click **Yes** to delete the selected site.

Note: If the site you are deleting, has employees configured within it, then the following error message appears:



To delete such buildings, first delete the employees within it.

For deleting an employee from a building, refer to "Deleting Employees" on page 19 in this chapter.

Employee

Employees in LobbyWorks are the hosts for visitors entering the premises. The employee categories define their privileges for application-access, visitor registration, and so on.

For information on employee categories, refer to "Employee" on page 15 in the chapter Categories.

The employee information is stored in the LobbyWorks database. Using the Administrator application, you can enter, view and modify the employee details.

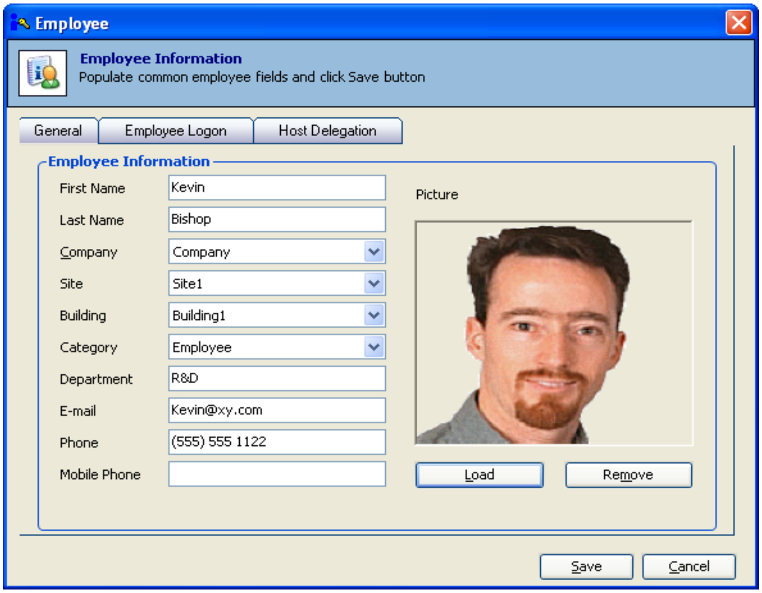
Adding an Employee

In LobbyWorks, employee information can be added individually or in bulk through the **Import** option.

For importing employees, refer to "Importing employee information" on page 20 in this chapter.

To add an employee:

1. In the navigation area, select the **Company** and the **Site** to which you want to add employees.
2. Right-click **Employees** in the display area, and select **Add**. The **Employee** dialog box appears.



3. In the **Employee** dialog box, click the **General** tab.
4. Type the following information:

Field	Description
First Name	First name of the employee.
Last Name	Last name of the employee.
Company	Name of the Company to which the employee belongs.
Site	Name of the Site to which the employee belongs.
Building	Name of the Building in which the employee is seated.
Category	Category assigned to the employee.
Department	Name of the Department.
E-mail	Employee's e-mail ID.
Phone	Employee's official contact number.
Mobile Phone	Employee's mobile contact number.

5. Click **Load** to upload the employee's photograph. Use **Remove** to remove the photograph.
6. Click **Save** to save the employee information.

For every employee you can:

- Set the logon user name
- Assign a secondary host

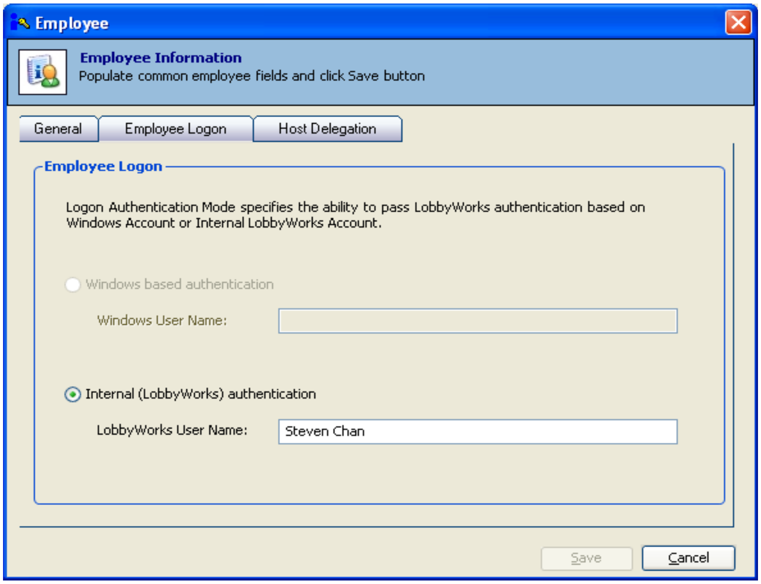
Set Login Information

An employee can log on to LobbyWorks with the Windows user name or a LobbyWorks user name.

Note: The authentication options displayed in the **Employee Login** tab depend on the logon settings for the company.

For setting logon details for the company, refer to "Setting Logon Details" on page 8 in this chapter.

1. In the Employee dialog box, click the **Employee Login** tab.



2. Select **Windows based authentication** to Type the **Windows User Name** for the employee.
3. Select **Internal (LobbyWorks) authentication** to Type the **LobbyWorks User Name** for the employee.

4. Click **Save** to save the login information.

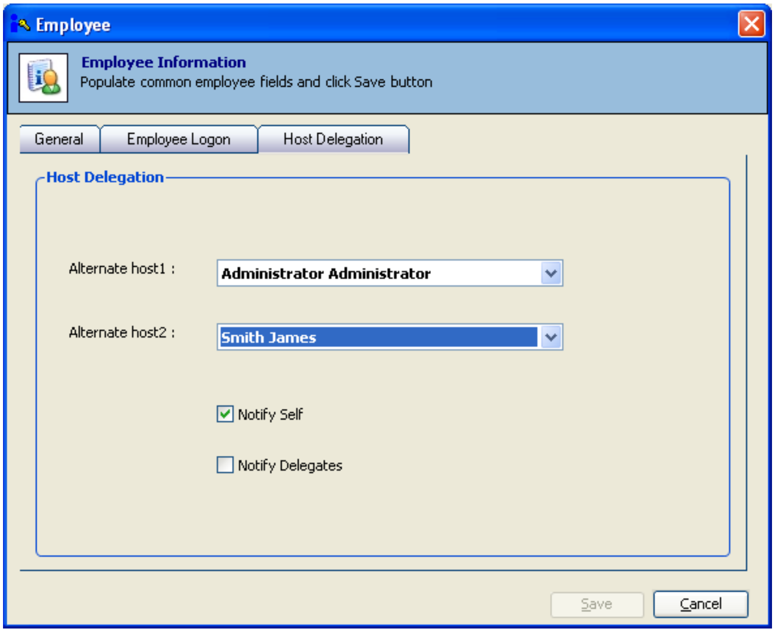
Assign alternate Host

In LobbyWorks, you can delegate an alternate host to your visitor in your absence.

Note: You can delegate a maximum of 2 alternate hosts. The alternate host delegation can be performed in the **Web Center** application.

To assign an alternate host

1. In the **Employee** dialog box, click the **Host Delegation** tab.



2. Select **Alternate host 1** and **Alternate host 2**, if necessary.

   You can assign any of the alternate hosts to meet the visitor in your absence.

3. Select the **Notify Self** check box to notify yourself through e-mail when the visitor arrives.
4. Select the **Notify Delegates** check box to notify the delegates through e-mail when the visitor arrives.
5. Click **Save** to save the host delegation information.

Editing Employee Information

LobbyWorks enables you to edit an employee's information.

To edit an employee's information:

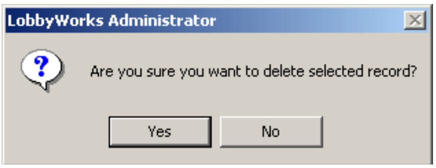
1. In the navigation area, expand **Profiles**, **Company** and **Site** and select **Employees**. A list of all the employees appears in the display area.
2. Right-click the employee whose information you want to edit and select **Modify**. The **Employee** dialog box appears.
3. Click the **General** tab to edit the employee's personal information.
4. Click the **Employee Login** tab to edit the log on settings.
5. Click the **Host Delegation** tab to edit the secondary host settings.
6. Click **Save** to save the modifications to the employee information.

Deleting Employees

You can permanently delete an employee when the employee leaves the company.

To delete employees:

1. In the navigation area, expand **Profiles**, **Company** and **Site** and select **Employees**. A list of all the employees appears in the display area.
2. Right-click the employee you want to delete and select **Delete**. A confirmation message appears.



3. Click **Yes** to delete the employee.

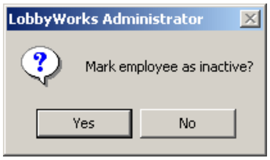
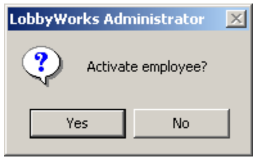
Set Employees Inactive/Active

The registration of visitors for employees on vacation or travel can be avoided by deactivating them in LobbyWorks. When deactivated, their name is not displayed in the Front Desk and Kiosk. On their return, the employees can be activated.

To activate/deactivate employees:

1. In the navigation area, expand **Profiles**, **Company** and **Site** and select **Employees**. A list of all the employees appears in the display area.

2. The following table explains how to set an employee active/inactive:.

Set Employee Inactive	Set Employee Active
Right-click the employee you want to deactivate and select **Mark Deleted**. A confirmation message appears. 	Right-click the inactive employee you want to activate and select **Undelete**. A confirmation message appears. 
Click **Yes** to set the employee inactive.	Click **Yes** to set the employee active.

Importing employee information

Adding employee information individually can be time consuming for a deployment involving multiple companies, with each company having a huge database.

The employee import option is a simpler and faster alternative. It enables you to add the information of multiple employees or an entire employee database, at one go.

You can import employee information:

- from a Microsoft Excel^{TM} sheet (.csv file) containing the data or
- directly from the company's active directory

Import data from a .csv file

Importing employee information from a Microsoft Excel^{TM} sheet saved as a .csv file is a two step process.

Step 1: Select the company, site and specify the location of the **Import File**

Step 2: Select the different conditions to set the rules for the import

To create a .csv file:

1. Open a Microsoft Excel^{TM} sheet and type the field names in the first row.
2. Fill the relevant data in each column.
3. Save the file in the .csv format.

The following picture shows how the field names must be entered in the .csv file.

Field Names

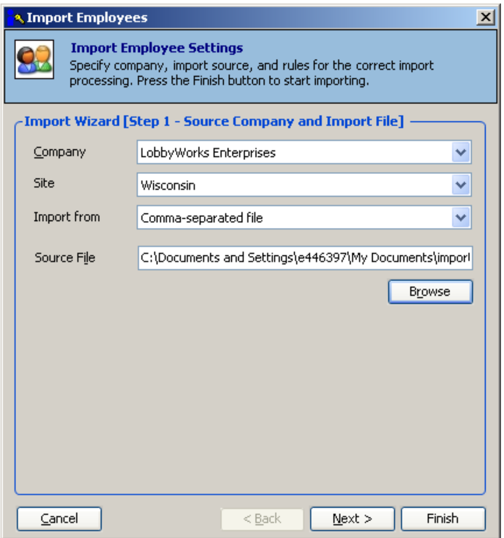
1	UserName	Category	First Name	Last Name	E-Mail Address	Phone	Buildings	Department
2	Paul M Howard	Employee	Paul	Howard	PaulHoward@LW.com	(555) 555 – 1891	R&D Facility	LobbyWorks Enterprises
3	GraceClarkson	Employee	Grace	Clarkson	GraceClarkson@LW.com	(555) 555 – 3458	R&D Facility	LobbyWorks Enterprises
4	MaryDowning	Employee	Mary	Downing	MaryDowning@LW.com	(555) 555 – 1291	R&D Facility	LobbyWorks Enterprises

Note: The First Name and Last Name are mandatory, if the information for these fields are not entered, the record is not saved in the Lobbyworks database.

Step 1: Specify the Source Company and Import File

To specify the location of the import file:

1. In the navigation area, select the company and the site to which you want to add employees.
2. Right-click **Employees** in the display area and select **Import**. The **Import Employees** dialog box appears.



3. Select the **Company** to which you want to import the employees.
4. Select the **Site** to which the employees belong.
5. Select the import option as **Comma-separated file (MS Outlook Address Book)** in the **Import from** drop-down box.
6. Type the location of the .csv file in the **Source** field.

   OR

Click **Browse** to traverse to the location of the .csv file.

7. Click **Next** to set the rules for the import operation.

Step 2: Specify the Import Rules

You can selectively import only the required information from the import file.

When importing employee data you can:

- **Import new employees**: Import the information of new employees, assign them to a category and generate user names for those without one

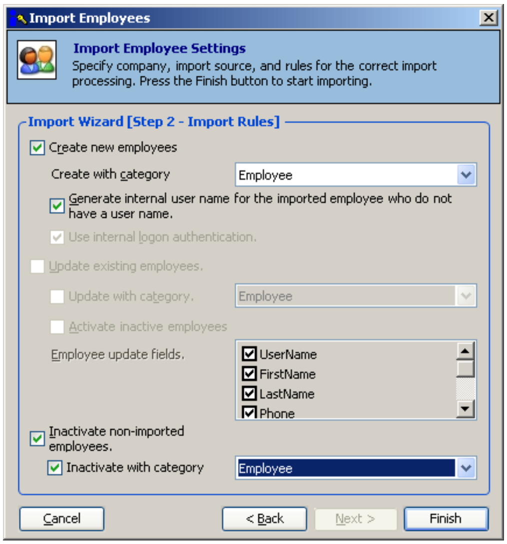
  For categorizing employees, refer to "Employee category" on page 15, in the Categories chapter.

- **Update existing employee information**: Select the category of employees and the data fields you want to update and activate the inactive employees

  For setting employees inactive, refer to "Set Employees Inactive/Active" on page 19, in this chapter.

- **Set non-imported employees inactive**: Deactivate employees whose information is present in the LobbyWorks database, but absent in the .csv file.

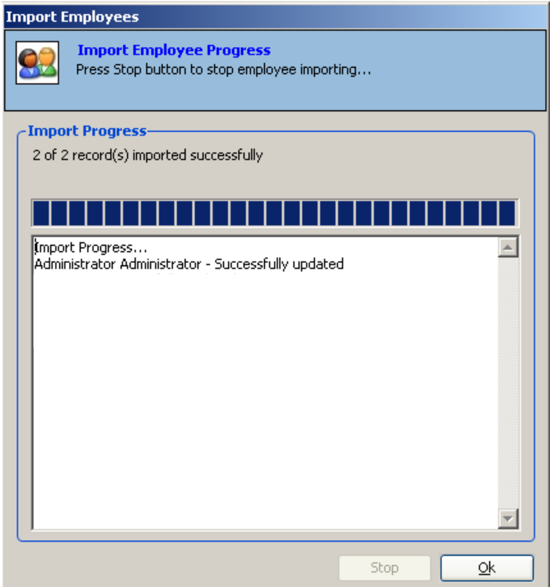
To set the import rules:



1. In the **Import Employees** dialog box, under the **Import Wizard [Step 2 - Import Rules]** select the appropriate options described in the following table:

Option	Description
Importing new employees	
Create new employees	Imports information of employees absent in the database (new employees).
Create with category	Assigns the newly added employees to the selected category.
Generate internal user name for imported employee that hasn't it	Enables LobbyWorks to automatically generate a user name for employees without one.
Updating existing employees	
Update existing employees	Updates the information of employees currently in the database.
Update with category	Updates only the information of employees belonging to the selected category.
Activate inactive employees	Activates the inactive employees, present in the LobbyWorks database.
Employee update fields	Updates only the selected employee data fields.
Setting non-imported employees inactive	
Inactive non-imported employees	Deactivates the active employees, absent in the .csv file.
Inactivate only with category	Deactivates only the active employees of the selected category.

2. Click **Back** to change the settings for the source information.
3. Click **Finish** to initiate the import process. The **Import Employees** dialog box shows the progress of the import.



4. Click **OK** to complete the import process.

Import data from an active directory

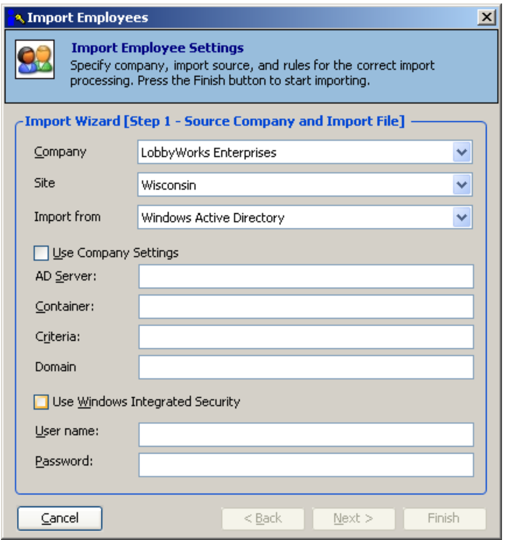
Importing employee information from the company's active directory is a two step process.

1. **Step 1**: Select the company, site and specify the address of the active directory
2. **Step 2**: Select the different conditions to set the rules for the import

Step1:Specify the Source Company and Active Directory Information

To set the active directory information:

1. In the navigation area, select the company and the site to which you want to add employees.
2. Right-click **Employees** in the display area and select **Import**. The **Import Employees** dialog box appears.



3. Select the **Company** to which you want to import the employees.
4. Select the **Site** to which the employees belong.
5. Select the import option as **Windows Active Directory** in the **Import from** drop-down box.
6. Type the following to specify the active directory information:

Option	**Description**
Use Company Settings	The active directory settings specified for the selected company are used to import employee information. For setting active directory information for a company, refer to "Setting Active Directory Information" on page 6, in this chapter.
AD Server	Active directory's address.
Container	Mode in which LobbyWorks connects to the active directory.
Criteria	Filter condition for importing information. **Example:** To import employees whose last names start with "Kerry", type **SN='Kerry*'**.

Option	Description
Use Windows Integrated Security	Windows assigned user name and password are used to access the active directory information.
User name	User name to access the information in the active directory.
Password	Password to access the information in the active directory.

7. Click **Next** to set the rules for the import operation.

Step 2: Specify the Import Rules

The rules for importing employee information from an active directory are similar to the rules available for importing from a .csv file.

For setting the import conditions, refer to “Step 2: Specify the Import Rules“ on page 22 in this chapter.

Exporting Employee Information

If you want to analyze the employee information, you can export employee information from LobbyWorks and save it as a .csv file.

To export employee information:

1. In the navigation area, select the company and the site from which you want to export employee information.
2. Right-click **Employees** in the display area and select **Export**.
3. Type or select the **File name** for the file to which you want to save the file.
4. Click **Save** to save the exported employee data as a .csv file.

Host Merge functionality

As documented in the previous sections of this chapter, employees can be added to LobbyWorks in different ways. Additionally, the employee database can be imported from Pro-Watch®, an access control system to LobbyWorks using SmartPlus, a middleware application. For more information on LobbyWorks Pro-Watch® integration refer to the “Appendix A - ACS Integration” chapter.

As employees are added to LobbyWorks in different ways, there is a possibility that employee records are duplicated. The Host Merge Functionality enables in removing this duplication by merging all the duplicate employee records to a single unique record.

Note: Host Merge functionality cannot merge the records, if there are more than 3 duplicate records for the same entity.

Example: Consider company A has the following employees having the similar first and last name, similar phone number and similar e-mail address as follows:

- First Name: John
- Last Name: Smith
- Phone: 61082
- E-mail: ab@xy.com

Using the Host Merge functionality, you can merge these two duplicate records to a unique record based on the common attributes for the two records such as First Name, Last Name, and Phone.

There are two types of merge.

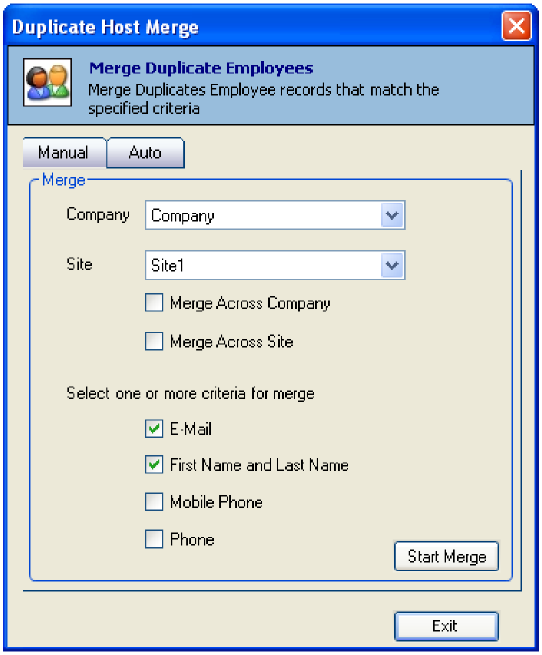
- Manual merge - Enables merging of duplicate employee records spread across companies based on the merge criteria specified manually.
- Auto merge - Enables automatic merging of duplicate employee records after importing from Active Directory and Pro-Watch® based on the merge criteria specified.

If there are conflicting values present in different records to be merged, then the merged record has the data in the following priority.

- Data of the host imported from AD.
- Data of the host imported from Pro-Watch®.
- Data of the host added in LobbyWorks.

To merge duplicate employee records

1. Expand **Advanced Configuration** in the navigation area, select Host Merge, and then double-click **Merge**. The **Duplicate Host Merge** dialog box appears



Manual merge

To perform manual merge

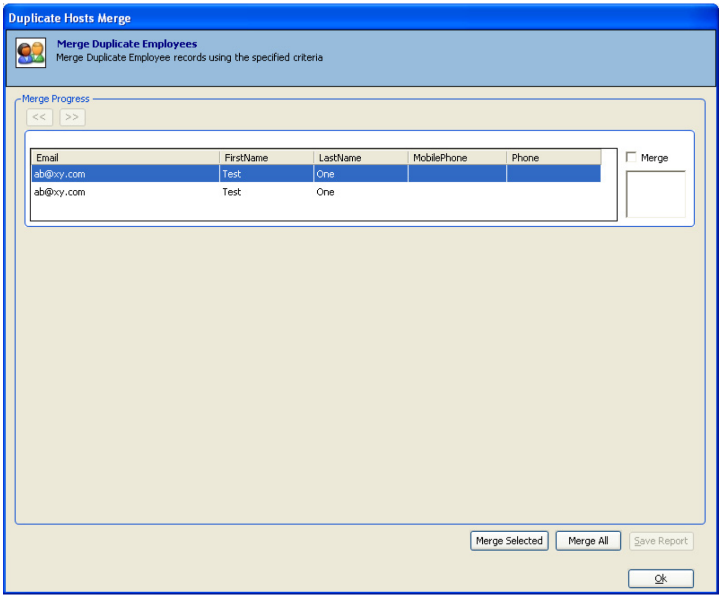
1. Select the **Company**.
2. Select the **Site**.
3. Select the **Merge Across Company** check box to merge duplicate employees across companies. The **Merge Across Site** check box is automatically selected, when you select this option.
4. Under **Select one or more criteria for merge**, select one or more or all the following merge criteria listed.
   - E-Mail
   - First Name and Last Name
   - Mobile Phone
   - Phone

Note: If you select more than one merge criteria, then only the employee records having similar attributes for the match criteria are listed.

Note: The duplicates are listed and/or merged only if there are three or less number of duplicates of a single employee.

5. Click **Start Merge**.

   The **Merge Duplicate Employees** dialog box appears as shown in the following figure.

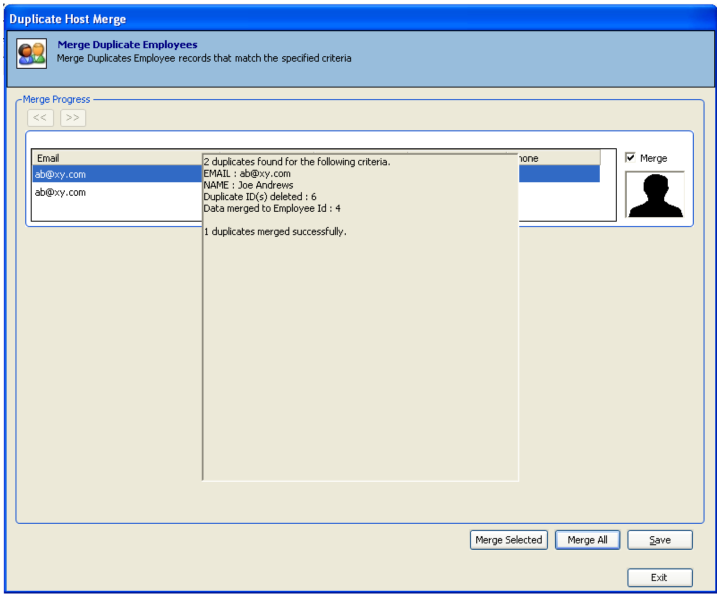


6. Select the **Merge** check box.
7. Click **Merge Selected** to merge the selected record

   OR

   Click **Merge All** to merge all the records listed.
8. Click **Ok** to complete the merge operation.

   The following popup appears after the merge operation.



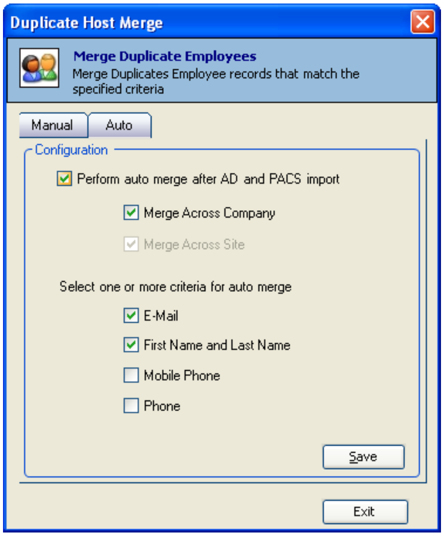
Note: Click **Save Report** to the save the merge results to a report.

Auto merge

To perform auto merge

1. Click **Auto** tab on the **Duplicate Host Merge** dialog box.

   The **Auto** dialog box appears.



2. Under **Configuration**

   – Select the **Perform auto merge after AD and PACS import** check box to enable automatic merging of duplicate employee records after importing from Active Directory and Pro-Watch®.

   Note: If auto merge is enabled, the duplicate employee records are merged in the background after AD and PACS import. This happens only during scheduled AD integration and badge holder addition/modification in Pro-Watch®.During manual AD import or manual PACS integration the duplicate host list is displayed to the user.

   – Select the **Merge Across Company** or **Merge Across Site** check box as applicable.

3. Under **Select one or more criteria for merge**, select one or more or all the following merge criteria listed.

   – E-Mail

   – First Name and Last Name

   – Mobile Phone

   – Phone

Note: If you select more than one merge criteria, the duplicate records are displayed, only if **BOTH** the merge criteria are listed in the duplicate employee records to be merged

4. Click **Save** to save the merge settings.

Caution: You cannot retrieve the hosts after the manual and auto merge operations.

Workstations

Workstations are computers connected to the LobbyWorks data network. They have LobbyWorks applications installed on them.

Installing an application from the LobbyWorks suite on a workstation, automatically adds the workstation to the database. However, you also have the option to add the workstations to the LobbyWorks database.

The Administrator settings enable you to assign the workstation to a company, building and site. As the workstation is assigned to a specific company and site, you can manage and track information related only to the site.

Example: Consider workstation X assigned to company Y. Personnel using the Front Desk on workstation X, can register visitors only for company Y.

Note: If you assign the workstation to a company, the **Company** drop-down list does not appear in the Front Desk Login screen.

Adding a Workstation

1. Expand the site and company to which the workstation is to be added.
2. Right-click **Workstations** in the navigation area, and select **Add**. The **Workstation** dialog box appears.

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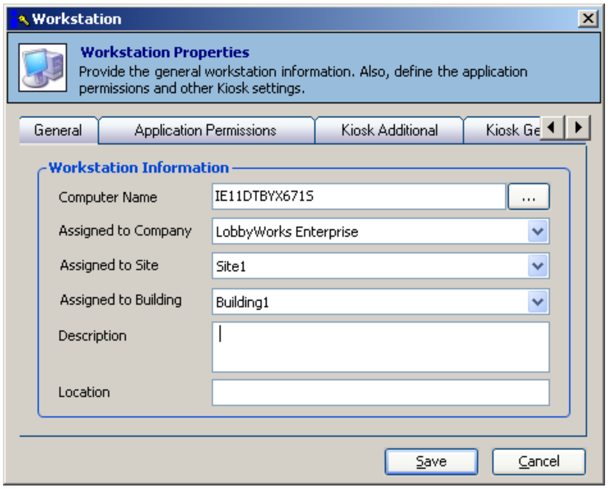


3. In the **Workstation** dialog box, click the **General** tab.
4. Type the **Computer Name**.

   OR

   Click [...] to open the **Browse for Computer** dialog box and select the computer.
5. Select the company in the **Assigned to Company** box.
6. Select the site in the **Assigned to Site** box.
7. Select the building in the **Assigned to Building** box.
8. Type a **Description** for the workstation.
9. Type the **Location** of the workstation.
10. Click **Save** to add the workstation information.

For every workstation you can:

- Select the applications that you want to run on the computer
- Set the general properties for the Kiosk running on the workstation
- Set the additional properties for the Kiosk running on the workstation

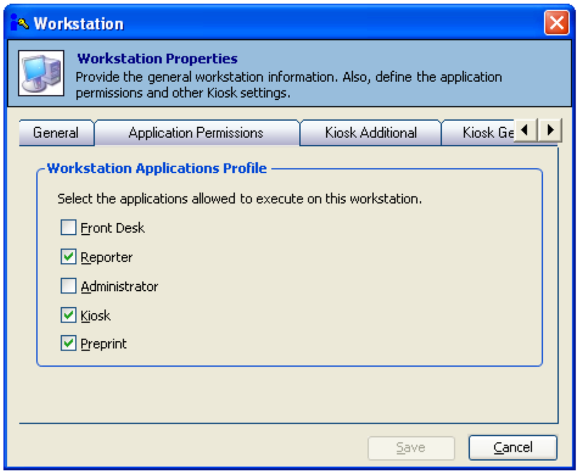
Note: Click ◄ or ► to view the required hidden tab.

Set the Application Permissions

You can select the applications that you want to run on the selected workstation, in the **Applications Permissions** tab.

To set the application permissions:

1. In the **Workstation** dialog box, click the **Application Permissions** tab.



2. Select the check boxes for the application(s) that can run on the workstation. The options available are **Front Desk**, **Reporter**, **Administrator**, **Kiosk,** and **Preprint**.
3. Click **Save** to save the application permission settings.

Set Additional Kiosk Properties

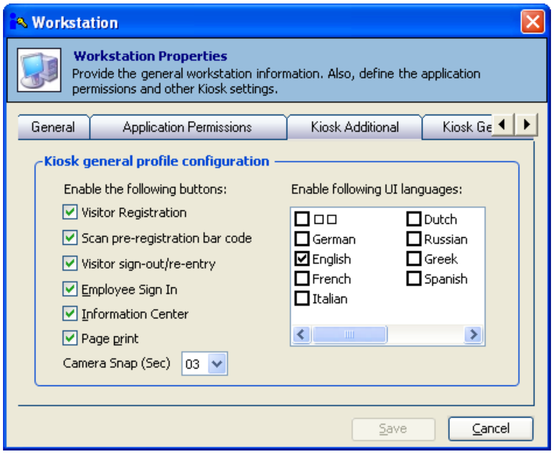
The Kiosk is used by visitors to self-register. However, there is an option for the hosts (or sponsors) to authorize and sign in their visitor/s using the Kiosk. The sponsor sign in option can be enabled in the **Kiosk Additional** tab.

Configuring the additional properties makes the Kiosk more easy to use. It also reduces the time taken for the visitor to sign in.

Note: For more information, See chapter "Kiosk Configuration" in Part B

To set the additional Kiosk properties:

1. In the **Workstation** dialog box, click the **Kiosk Additional** tab.



2. Select the **Visitor Registration** check box to enable the visitors to register themselves. This reduces the wait time for visitors as they need not wait at the Front Desk.

3. Select the **Scan pre-registration bar code** check box to enable the visitor to scan the bar code that was sent through e-mail while pre-registering.

4. Select the **Visitor sign-out/re-entry** check box to enable the visitor to automatically sign-out after finishing the meeting.

5. Select the **Employee Sign In** check box to display the option that enables the sponsor to sign in and authorize the visitor at the Kiosk.

6. Select **Information Center** to display the information center option in the Kiosk. The information center can be configured to display your company's information. The links you created are also displayed in the information center.

   For creating links, refer to "Links" on page 5, in the Additional Settings chapter.

7. Select the **Page print** check box to enable the **Print** option in the Kiosk Information Center. The visitor can click the **Print** option in the Kiosk, to print the onscreen information, if a printer is connected to the Kiosk.

Note: This **Page print** option is enabled only when you select the Information center check box.

8. Select the **Camera Snap(Sec)** time.

9. The **Enable following UI languages** contains a list of languages. Select the check boxes for the languages that can be displayed on the Kiosk user interface.
10. Click **Save** to save the additional Kiosk settings.

Set General Kiosk Properties

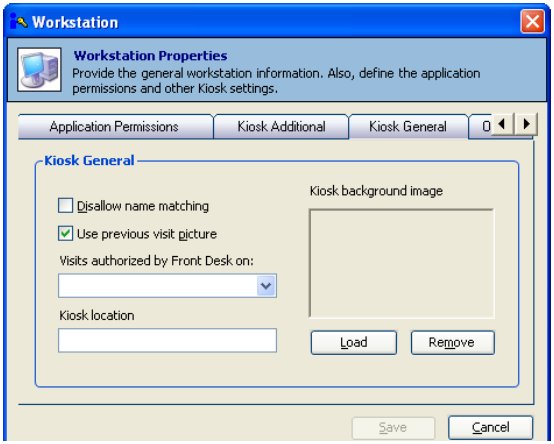
The general settings determine the basic features available to the visitor, at the Kiosk. You can enable the following features:

- Touch screen feature to avoid using the keyboard
- Allow name matching to speed up the process of entering information

Note: For more information, See chapter "Kiosk Configuration" in Part B

To set the general Kiosk properties:

1. In the **Workstation** dialog box, click the **Kiosk General** tab.



2. Select the **Disallow name matching** check box to disable the name matching feature.

Note: Before you select this option, you must clear the Allow only pre-registered visitor option in the Setting general kiosk properties dialog box.

3. Select the **Use previous visit picture** check box to use the previous visitor's photo to print badges for the subsequent visits.
4. Select the name of the computer on which the Front Desk authorizes the visitor, in the **Visit authorized by Front Desk on** box.

Note: When the visitor registers at the kisok, a message appears informing the visitor to go to specified Front Desk to collect the badge.

5. Type the **Kiosk location**.
6. To set the **Kiosk background image**:
   - Click **Load** to apply the selected the image as the background.
   - Click **Remove** to undo the selection.
7. Click **Save** to save the general Kiosk settings.

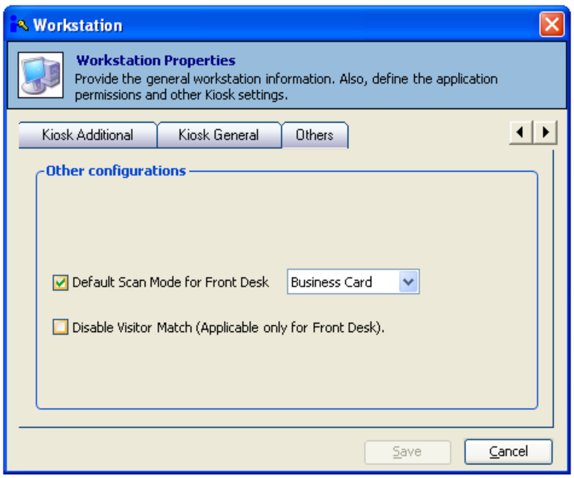
Setting other Properties

The other settings determine the additional features available to the visitor at the Kiosk.You can enable the following features.

- Allow default scan mode for a visitor entering the Front Desk.
- Enable/Disable visitor match.

To set the other properties for the kiosk:

1. In the **Workstation** dialog box, click the **Others** tab.



2. Select the **Default Scan Mode for Front Desk** check box to enable the front desk personnel to select the following scan mode(s) for visitor authorization
   – Business Card
   – Driver License
   – Passport

– Barcode

3. Select the **Disable Visitor** (Applicable only for Front Desk) check box to disable the visitor match feature.
4. Click **Save** to save the other Kiosk settings.

Editing a Workstation

1. Select the company and site for which the workstation properties need to be modified.
2. Select **Workstations** in the navigation area. A list of all the available workstations appears in the display area.
3. Right-click the workstation you want to edit, and select **Modify**. The **Workstation** dialog box appears.
4. Make the required changes to the workstation properties.
5. Click **Save** to save the changes and close the dialog box.

Deleting a Workstation

1. Select the company and site for which the workstation properties need to be modified.
2. Select **Workstations** in the navigation area. A list of all the available workstations appears in the display area.
3. Right-click the workstation you want to delete, and select **Delete**. A confirmation message appears.
4. Click **Yes** to delete the workstation form the LobbyWorks database.

Categories

12

In this chapter...

Overview

Categories in LobbyWorks, are pre-defined groups and can be used for:

- configuring permissions for visitors
- granting or revoking access to the various LobbyWorks applications for every employee and in addition, defining visit rights for their visitors
- keeping a record of the type of employee assets
- tracking the type of deliveries to and from employees

Categories are created by default, when a site is created within LobbyWorks Administrator.

The pre-defined categories in LobbyWorks are:

- Visit: Controls and tracks a visitor's entry to the premises
- Employees: Controls the number of visitors an employee can have and also limits an employee's access to the various LobbyWorks applications
- Asset: Manages the employee asset details
- Deliveries: Manages and tracks the details of deliveries, to and from an employee

Note: The application does not allow you to add any categories. However, you can create sub-categories for each category. For example, you can add Security, Catering, and Parking as sub-categories under Visit Category.

Visit category

LobbyWorks can have any number of Visit category definitions. However, by default, there are three pre-defined visit categories called **Visitor**, **Contractor** and **Service**. These are created when LobbyWorks is installed for the first time and when a site is added. Each of these visit categories have their unique settings. You can modify these settings and also add visit categories to the list.

Adding a visit category

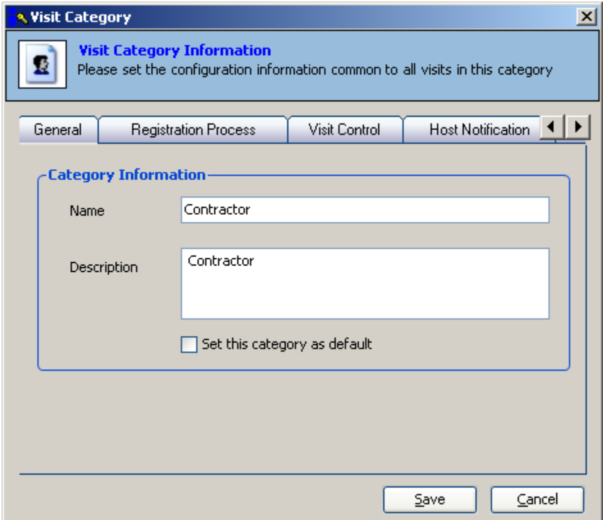
1. Select **Categories** in the navigation area, right-click **Visits** in the display area and select **Add**.

   OR

   Expand **Categories** in the navigation area, right-click **Visits** in the navigation area and select **Add**.

   OR

Expand **Categories** in the navigation area and select **Visits**. Right-click anywhere in the blank space in the display area and select **Add**. The **Visit Category** dialog box appears.



2. In the **Visit Category** dialog box, click the **General** tab.
3. Type the **Name** of the visit category.
4. Type a **Description**.
5. Select the **Set this category as default** check box to make this the default category for all visitors being registered in the Front Desk, Kiosk, and Web Center applications.
6. Click **Save** to add the visit category.

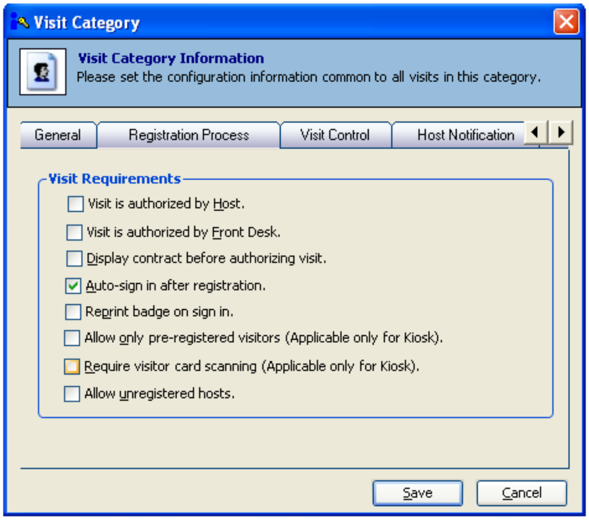
For every visit category you can:

- Configure the visit rights for visitors entering the premises
- Limit the number and duration of visits
- Define the means to alert the host on the visitor's arrival
- Select the application through which a visit can be registered
- Select the badge template
- Customize the fields that would appear in the Front Desk Application at the time of visitor registration

Note: Click or to view the required hidden tab.

Set the Registration Process

1. In the **Visit Category** dialog box, click the **Registration Process** tab.



2. Select the appropriate check boxes under **Visit Requirements** based on the following information:

Table 12-1 Visit Requirements

Option	Description
Visit is authorized by Host	Host or Front Desk personnel can authorize the visitor.
Visit is authorized by Front Desk	The Front Desk personnel can authorize the visitor.
Display contract before authorizing visit	This option is applicable to the Kiosk. The contract is displayed before authorization by the Front Desk personnel/host.
Auto-sign in after registration	Visitor is signed in automatically after registration.
Reprint badge on sign in	Prints the badge after every sign in.

Option	Description
Allow only pre-registered visitors (Applicable only for Kiosk)	Only pre-registered visitors are allowed for this visit category (applicable for registration only through Kiosk).
Require visitor card scanning (Applicable only for Kiosk)	The visitor card to be scanned before registration. (applicable for registration through Front Desk and Kiosk).
Allow unregistered hosts	When host details are unavailable during registration, the front desk personnel can create the employee and then register the visitor.

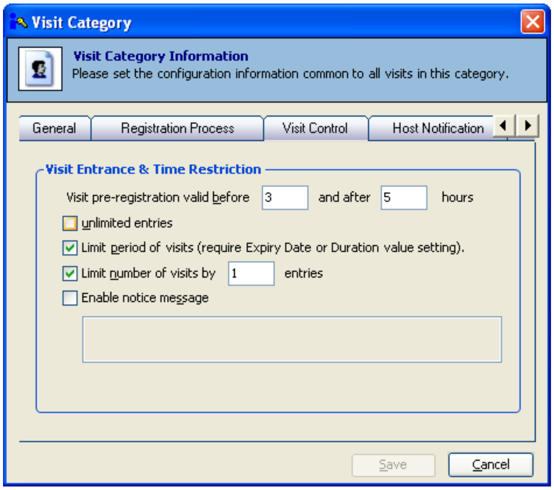
3. Click **Save** to save the settings and close the dialog box.

Provide Visit Control Information

You can define the number of visitors you want in the premises for a particular visit category. In addition you can:

- permit unlimited entries to the visitors of a category
- limit the number of entries by the visit expiry date
- type a notice message to be displayed at the Front Desk, when a visitor is signed in after visit expiry

1. In the **Visit Category** dialog box, click the **Visit Control** tab.



2. To set the validity period for visitor pre-registration, type the number of hours in the **Visit pre-registration valid before... and after... hours** text boxes.

   Example: If the visitor is pre-registered for 10:00 hrs, and the values entered are 2 and 3 hours respectively, the pre-registration is valid for the time interval between 8:00 hrs and 13:00 hrs.

3. Select the **Unlimited entries** check box if you want to permit multiple entries of the visitors.
4. Select the **Limit period of visits (require Expire Date or Duration value setting)** check box, to limit visits by the expiry date and duration entered by the front desk personnel, at the time of registration.
5. Select the **Limit the number of visits by** check box and type the number of visits that you want to allow for a day. This option allows you to limit the number of visits to the number specified in the text box.
6. Select the **Enable Notice message** check box to display a notice message at the Front Desk. You can enter your custom notice message in the textbox.

   When the front desk personnel signs in a visitor after the visit expires, the message “**Are you sure you want to sign in this visitor?**” appears with your custom message.

7. Click **Save** to save the restriction details of the category.

Provide Host Notification Information

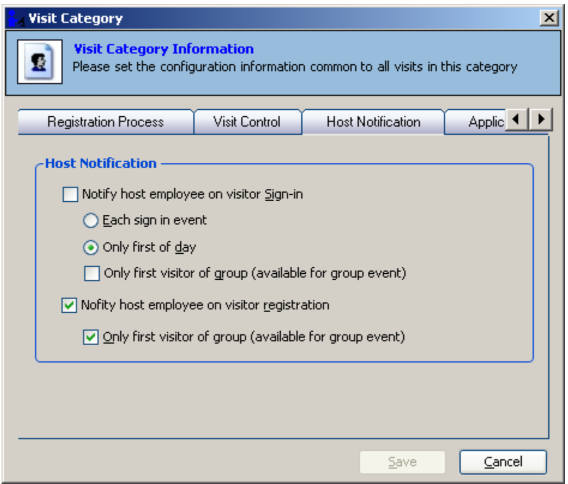
When a visitor checks in or registers in the premises, the visitor's host can be notified. This notification is sent through the network using the LobbyWorks Notify application. For the host to be notified, you need to configure the host notification settings for the visit category.

Configuring host notification settings involve:

- Specifying whether the host needs to be notified on visitor registration or sign-in
- Specifying group notification settings

For selecting the method of notification, refer to "Select notification method" on page 19 in this chapter.

1. In the **Visit Category** dialog box, click the **Host Notification** tab.



2. Select the **Notify host employee on visitor Sign-in** to notify the host for every sign-in by the visitor.
   - Click **Each sign in event** to inform the host about every visitor sign in.
   - Click the **Only first of day** to notify the host for only the first sign-in by the visitor. This is relevant for visitors who are permitted multiple entries.

- Select the **Only first visitor of group (available for group event)** check box to notify the host when the first visitor in a visitor group signs in. Select this option when a group of visitors belonging to a particular visitor group are visiting the premises.

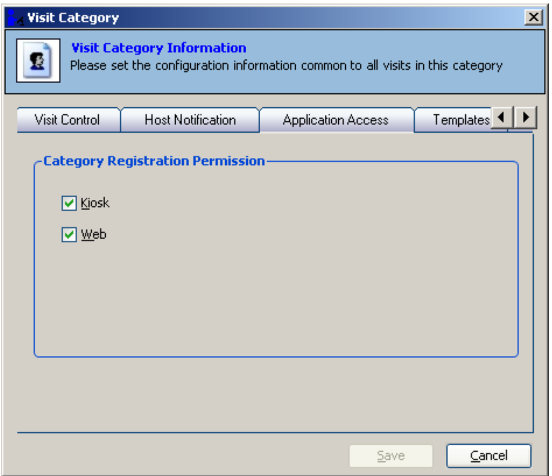
3. Select the **Notify host employee on visitor registration** check box to notify the host for every registration by the visitor.

   - Select the **Only first visitor of group (available for group event)** check box to notify the host when the first visitor registers. Select this option when a group of visitors belonging to a particular visitor group are visiting the premises.

4. Click **Save** to save the host notification settings.

Application Access Permission

A visitor to the premises can be registered through the Front Desk application by the front desk personnel. Or, the visitor can do a self-registration through the Kiosk. The mode of registering visitors belonging to a specific category can be set in the Application Access tab.



1. In the **Visit Category** dialog box, click the **Application Access** tab.
2. Select the **Kiosk** check box to enable visitor self-registration through the Kiosk.
3. Select the **Web** check box to enable visitor pre-registration through the Web Center application.
4. Click **Save** to save the settings for the application access permission.

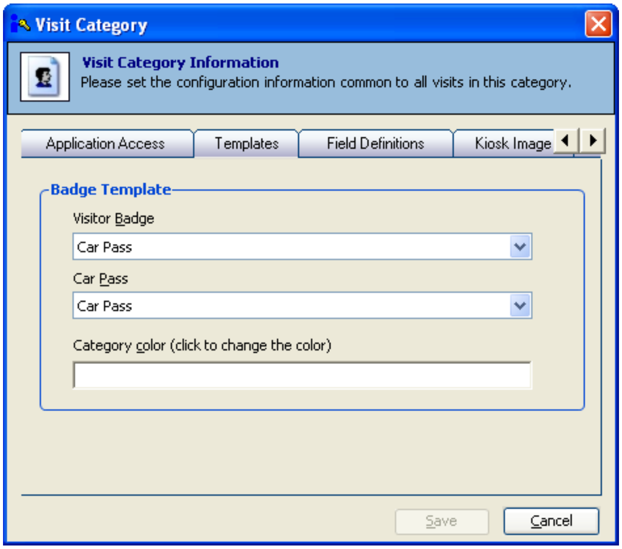
Select the Badge Template

Visitors to the premises must carry a badge with them to facilitate identification. In this dialog box, you can assign badge templates for different visit categories. Using these templates, badges would be printed for every visitor in the Front Desk application.

For more details on printing a badge for a visitor, refer to the Print a Badge section in the *Front Desk User's* Guide.

Each category must be assigned a badge template to differentiate them from the visitors belonging to other categories. You can also assign a unique badge color to the visit category.

1. In the **Visit Category** dialog box, click the **Templates** tab.



2. Select the badge template from the **Visitor Badge** list.
3. Select a template for the **Car Pass** from the list.
4. To select a color for the badge of this category:
    a. Click anywhere in the **Category color (press any key or click to modify)** box or press any key on the keyboard to open the **Color** dialog box.

b. From the **Basic colors** palette, click the color you want to use for the category.

c. To define a custom color, click **Define Custom Colors** and specify the color combination in the **Color** dialog box.

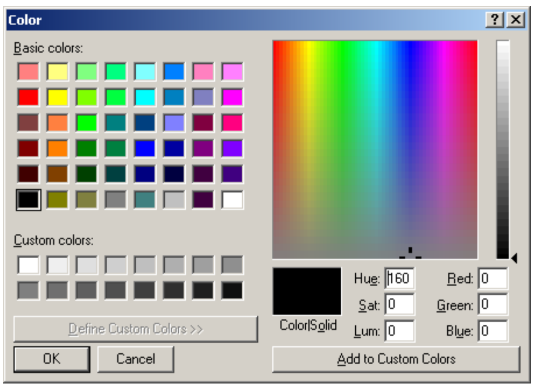
d. Click **OK** to apply the color and exit from the **Color** dialog box.

For defining custom colors, refer to "Define a Custom Color" on page 10 in this chapter.

5. Click **Save** to save the settings and close the **Visit Category** dialog box.

Define a Custom Color

1. If you know the Red, Green, Blue equivalents for a specific color, enter those values in the **Red**, **Green**, and **Blue** boxes.



OR

If you know the Hue, Saturation, Luminosity equivalents for a specific color, enter those values in the **Hue**, **Sat** and **Lum** boxes.

OR

Use the color selector to choose the color.

Table 12-2 Color Settings

Option	**Description**
Hue	Wave length of light reflected by an object. It is the characteristic commonly called color, and identified by color names such as yellow, green, or orange. Hue values range from 0 (red) through 239 (running through the spectrum and returning to red).
Saturation	Strength of the color. It indicates the amount of gray in the color. Saturation values range from 0 (gray with no trace of color) through 240 (fully saturated color with no gray).
Luminosity	Luminosity is the relative brightness or darkness of the color. Luminosity values range from 0 (black) through 240 (white) with the un-tinted color at about 120.
Red Green Blue	The RGB model is based on the representation of the visible spectrum by mixing red, green, and blue light. Computer monitors are based on this model, creating colors by emitting light through red, green, and blue phosphors. The RGB model assigns a value for each pixel ranging from 0 (black) to 255 (white) for each color component. The red on the Basic color palette has a Red value of 255, a Green value of 0 and a Blue value of 6.
Color Solid	The color swatch shows the color as it appears on the monitor, and also its approximate appearance when printed.

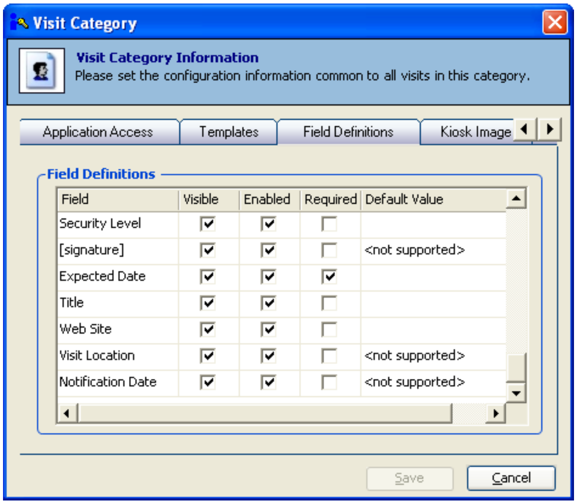
2. Click **Add to Custom Colors** to add the customized color to the **Custom colors** list.
3. Click **OK** to apply the color and exit from the **Color** dialog box.

Customize Field Definitions

You can select the field to be displayed for each visit category in the Front Desk, Kiosk, and Web Center applications.

To customize the fields:

1. In the **Visit Category** dialog box, click the **Field Definitions** tab.



2. Under **Field Definitions**, select the options for every field that must be displayed in the Front Desk, Kiosk, and Web Center applications.
   a. **Visible** - The field is displayed in the application.
   b. **Enabled** - The field appears enabled in the application.
   c. **Required** - The field is displayed and is mandatory.
   d. **Default Value**:
      * Enter the default value for the field displayed in the application.
      * **<not supported>** indicates that a default value cannot be provided for the field.

Note: Ensure that you do not clear the Host Building and Expire date check boxes. If you clear it, you might not complete the visitor registration in the Front Desk application.

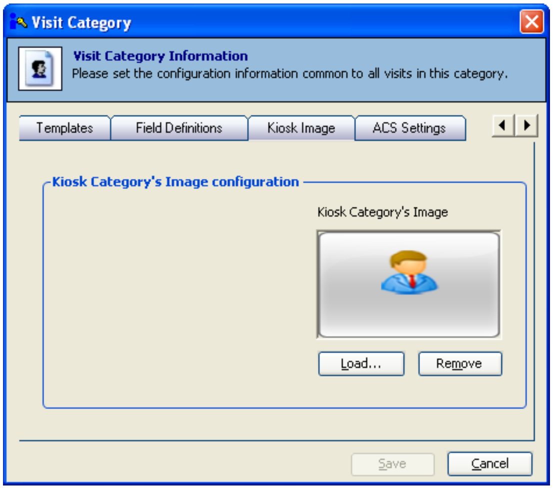
3. Click **Save** to save the entries and close the **Visit Category** dialog box.

Configuring the Kiosk Image

When a visitor self-registers on the Kiosk, the three visit categories (Visitor, Contractor, and Service) appear with default images. A default image also appears for the each new category that you add. These images can be set using the options in the Administrator application. You can replace the default images with an image of your choice. Use the options in the Administrator application to replace the images.

To configure the image:

1. Expand **Categories** in the navigation area and select **Visits**. Double-click **Visitor** from the list in the display area and select **KIOSK Image**.



2. Click **Load...** and browse to folder from where you want to select the image.
3. Click **Save** to save the image and close the **Visit Category** dialog box.
4. You can remove the uploaded image by clicking **Remove**.

Note: Repeat steps from 1 through 4 to upload Kiosk Category’s image to Contractor and Service.

Configuring ACS Settings

LobbyWorks is integrated with Pro-Watch® access control system using the SmartPlus commercial interface.

SmartPlus functions in two ways.

- Gets employee details from Pro-Watch® to LobbyWorks
- Sends visitor details from LobbyWorks to Pro-Watch®.

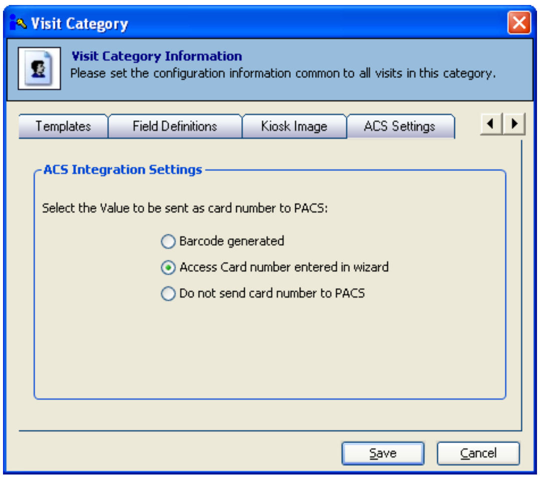
The primary source of entry for a visitor to any premises is an access card. Additionally, some premises use a unique barcode for visitor entry. Barcodes are usually printed on badges by a barcode printer.A barcode reader can be used to retrieve the encoded information from the badge. In the absence of an access control system, this reader can be used at entrances to track visitor movement.

Note: The visitor barcode appears on badges provided for visitors.

This information (usage of access card or barcode for visitor entry) must be sent to Pro-Watch®.Use the **ACS Settings** dialog box to configure the Pro-Watch® settings.

To configure the ACS integration settings

1. In the **Visit Category** dialog box, click the **ACS Settings** tab.



2. Under **ACS Integration Settings**, click any one of the following option buttons as applicable.
   – Barcode generated - sends the barcode that is generated by LobbyWorks for visitor's entry
   – Access card number entered in wizard - sends the access card number entered in Front Desk application to Pro-Watch®

– Do not send card number to PACS - LobbyWorks does not send any access card number to Pro-Watch®.

3. Click **Save** to save the ACS integration settings.

Employee category

The employees of a company can be:

- administrators of the LobbyWorks Administrator application
- operators of the LobbyWorks Front Desk application
- hosts to visitors
- interns on temporary assignments to the premises or
- people with other user-defined functions

LobbyWorks enables you to categorize each of them and further define:

- their access to the various LobbyWorks applications
- their authorization rights and notification requirements
- specific limits on the number of visitors they can host

There are four pre-defined employee categories in LobbyWorks--**Employee**, **Administrator**, **Operator,** and **Temporary Host**. You can modify the existing categories or create new employee categories.

Adding an employee category

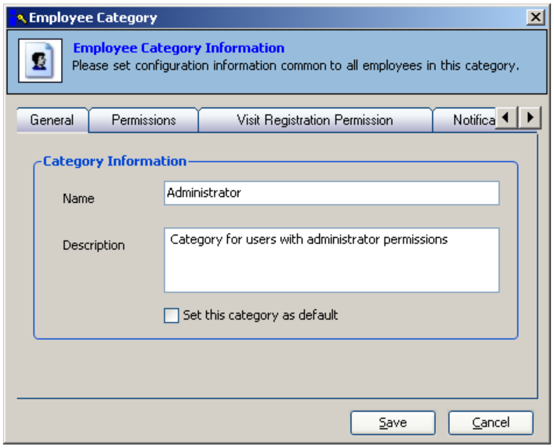
1. Select **Categories** in the navigation area, right-click **Employee** in the display area and select **Add**.

   OR

   Expand **Categories** in the navigation area, right-click **Employee** in the navigation area and select **Add**.

   OR

   Expand **Categories** in the navigation area and select **Employee**. Right-click anywhere in the blank space in the display area and select **Add**. The **Employee Category** dialog box appears.



2. Click the **General** tab in the **Employee Category** dialog box.
3. Type the **Name** for the category.
4. Type a **Description**.
5. Select the **Set this category as default** check box to make this the default category for all the employees being registered at the Front Desk.
6. Click **Save** to add the new category to the list of employee categories.

For every employee category you can:

- Select the applications you want the employees to have access to
- Select the option for employees pre-register visitors for themselves as the host, or for employees from the building, site, or company as hosts
- Select the method for host authorization and alerting the host on visitor sign in
- Control the number and type of visits a host can have
- Select the badge template for the employee category
- Customize the fields that would appear in the Front Desk application at the time of employee registration
- Restrict the areas that the employee can access

Provide application access

An employee who is the host, can pre-register a visitor through the Web Center application. On the visitor’s arrival, the host can be alerted through the Notify application. So the employee needs access to both these applications.

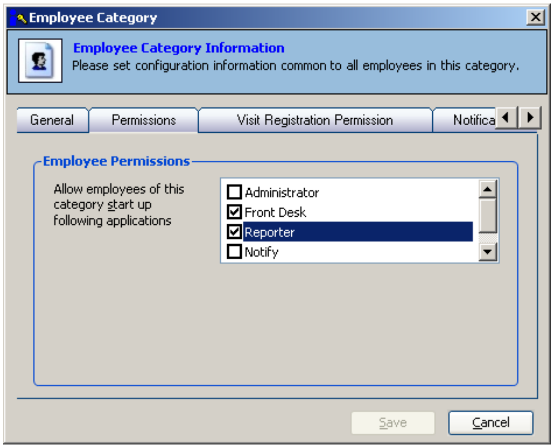
In addition, an employee can be given access to entities within these applications.

As the administrator, an employee can be provided complete access to all the LobbyWorks applications.

Example: In your company, interns need access only to the Web Server and Notify applications. Therefore, you can select only these check boxes for the employee category 'Intern'. Further, within Web Server you can grant access only to the Web Pre-Registration entity.

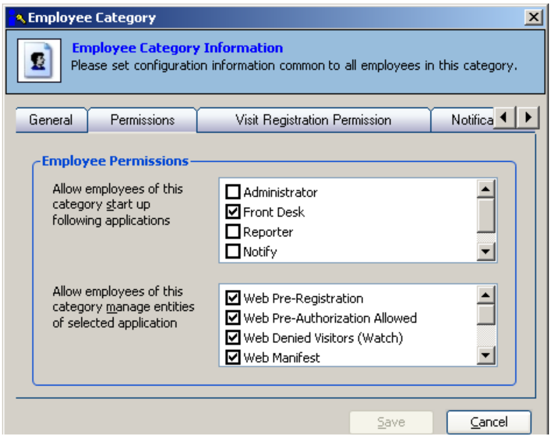
To set the access:

1. In the **Employee Category** dialog box, click the **Permissions** tab**.**



2. The **Employee Permissions** contains a list of all the LobbyWorks applications. Select the check boxes for the applications that can be accessed by the employees belonging to the category. Clear the check boxes for the applications for which access must be denied.

   When you select the **Front Desk** or **Web Server** applications, the various entities within the application are listed.



3. Select the entities of Web Server and Front Desk that you want to grant access to.

Note: Ensure that both the Host Building and Expire date check boxes are selected. You cannot complete the visitor registration in the Front Desk application, without selecting these options

4. Click **Save** to save the application access settings and close the dialog box.

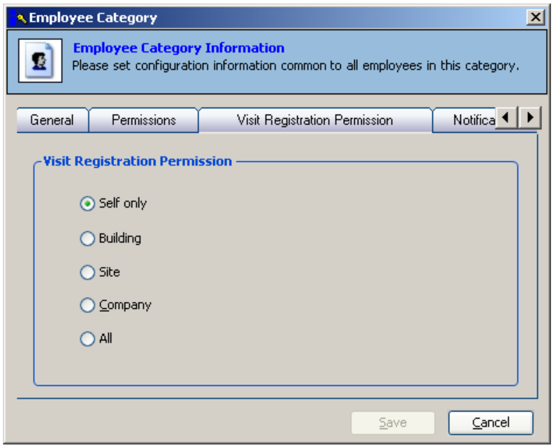
Set visit registration permission

In the **Visit Registration Permission** tab, you can select the hosts for visitor pre-registration. The employees of the category can pre-register visitors only for the selected hosts.

Example: Employees of category “Managers” can register visitors for their team members belonging to the same Building.

To set the permissions:

1. In the **Employee Category** dialog box, click the **Visits Registration Permission** tab**.**



2. Under **Visit Registration Permission** click the required option among the following options:

Table 12-3 Visitor Pre-registration Permission Options

Option	Description
Self only	Only for self as host
Building	A host belonging to the same building
Site	A host belonging to the same site
Company	A host belonging to the same company
All	Any employee as host, irrespective of site, company or building

3. Click **Save** to save the permissions and close the dialog box.

Select notification method

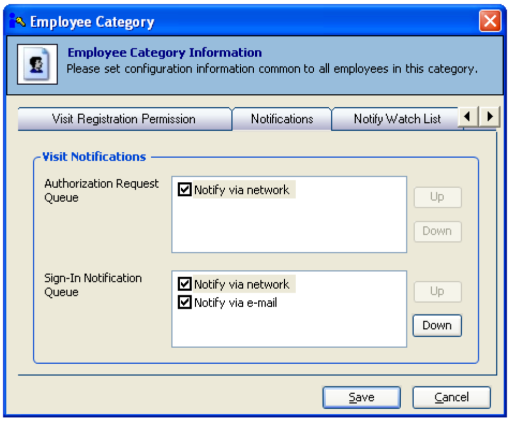
The host can authorize the visitor through the Notify application, by telephone or by mobile phone. In addition to the available authorization methods, visitor sign-ins can be notified by e-mail.

You can select the notification and authorization methods for an employee category using the options provided in the **Notifications** tab.

In addition, you can arrange the authorization options in the descending order of their priority. If the first notification does not receive a response from the host, the next selected notification mode is executed.

To select the notification method:

1. In the **Employee Category** dialog box, click the **Notifications** tab.



2. In **Authorization Request Queue**, select the check boxes for the required authorization mode.
   - Click the **Up** or **Down** buttons to set the priority for the notification method.
3. In the **Sign-In Notification Queue**, select the manner in which the host must be alerted on the visitor's sign in.

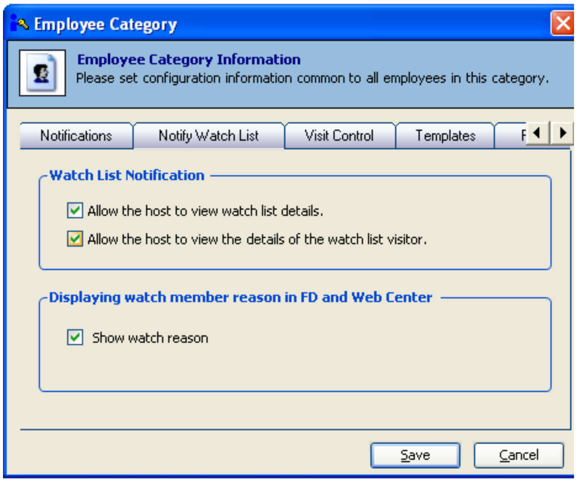
   Note: This notification is only for the host's information and a reply is not required. Therefore, only the first selected notification method is executed.
4. Click **Save** to save the notification settings.

Notify watch list

A Watch List is a list of suspicious visitors and companies. The members of the watch list are denied permission to enter the premises.You can view the watch list details and the details of the watch list visitor through this application.

To set the Watch List Notification access:

1. In the **Employee Category** dialog box, click the **Notify Watch List** tab.

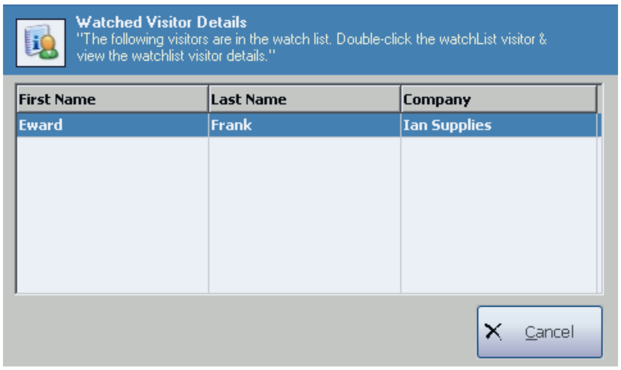


2. Select the **Allow the host to view watch list details** check box to allow the host to view the watch list only in the Notify application.
3. Select the **Allow the host to view the details of the watch list visitor** check box to allow the host to view the details of any specific visitor in the watch list.

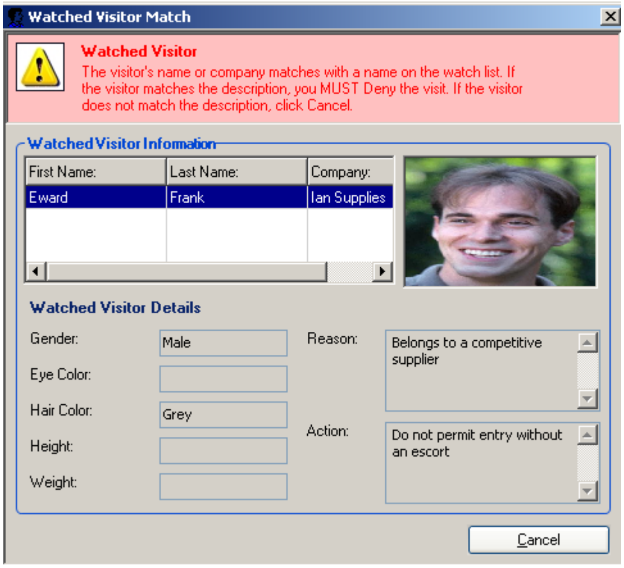
Note: You can view the details such as the visitor name, the reason for watch listing the visitor can be viewed using the notify.

a. Right-click the Notify icon on the task bar.

b. Select **WatchList Details**. The **WatchList Visitor Details** screen appears.



c. Double-click anywhere on the visitor. The **Watched Visitor Match** window appears.



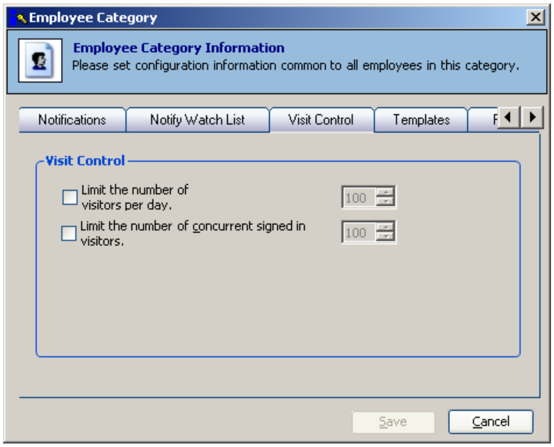
4. Select the **Show watch reason** check box to display the watch member reason in Front Desk and Web Center applications.
5. Select **Save** to save the selection.

Provide visit control information

You can also set a limit on the number of visitors a host can have, in the premises, at any given time.

To specify the visit limitations:

1. In the **Employee Category** dialog box, click the **Visit Control** tab**.**



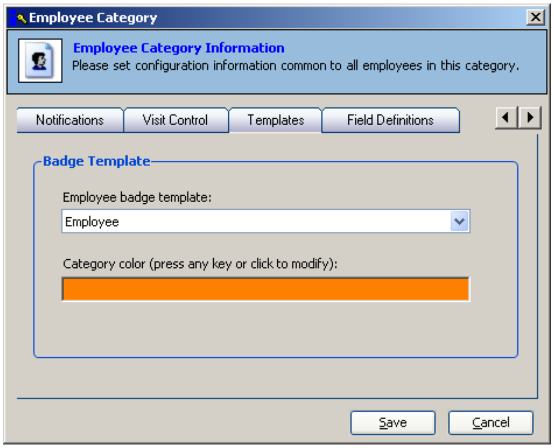
2. Select the **Limit number of visitors per day** check box to limit the number of visitors for the host and select the maximum number of visitors in the spin box provided alongside.
3. Select the **Limit number of concurrent signed in visitors** check box to limit the number of visitors for the host, all visiting at the same time. Also select the maximum number of visitors in the spin box provided alongside. This can help in limiting the size of a group of visitors.
4. Click **Save** to save the visit control settings.

Select the badge template

If required, temporary badges can be provided to an employee. Badge templates can be assigned to every employee category, and these templates can be used for printing the temporary badges.

To select a badge:

1. In the **Employee Category** dialog box, click the **Templates** tab**.**



2. Select the badge template from the **Employee badge template** list.
3. To select a color for the badge:
    a. Click anywhere in the **Category color(press any key or click to modify)** box or press any key on the keyboard to open the Color dialog box.
    b. From the **Basic colors** palette, click the color you want to use for the category.
    c. To define a custom color, click **Define Custom Colors** and specify the color combination in the **Color** dialog box.

    For defining custom colors, refer to "Define a Custom Color" on page 10 in the Visit Category section, in this chapter.
4. Click **Save** to save the selection.

Customize field definitions

You can select the field to be displayed for each employee category in the Front Desk application.

For customizing the fields, refer to "Customize Field Definitions" on page 12 in the Visit Category section in this chapter.

Assets category

LobbyWorks helps you:

- track employee assets by providing an asset badge
- maintain all the information related to the asset

You can create different asset categories for different assets like laptop, floppy disks, and external drives.

When LobbyWorks is installed for the first time, or whenever a site is created, a **Default** asset category is created. You can modify this category information and add asset categories.

Adding an asset category

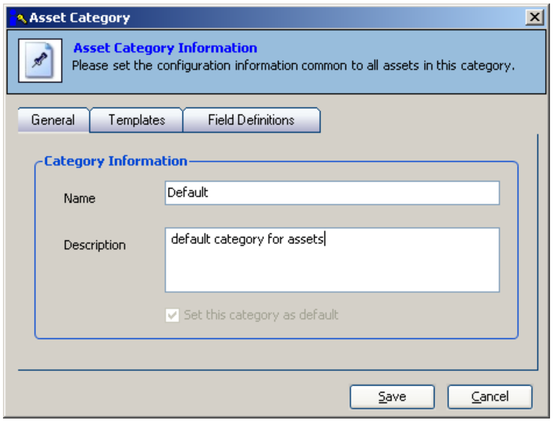
1. Select **Categories** in the navigation area, right-click **Assets** in the display area and select **Add**.

   OR

   Expand **Categories** in the navigation area, right-click **Assets** in the navigation area and select **Add**.

   OR

   Expand **Categories** in the navigation area and select **Assets**. Right-click anywhere in the blank space in the display area and select **Add**. The **Asset Category** dialog box appears.



2. Type the **Name** of the asset category.
3. Type a **Description**.

4. Select the **Set this category as default** check box to make this the default category for all the assets being registered in the Front Desk application.
5. Click **Save** to add the new category to the list of asset categories.

For every asset category you can:

- Select the badge template for the asset category
- Customize the fields that would appear in the Front Desk application at the time of asset registration

Note: Click the or to view the required, hidden tab.

Select the badge template

LobbyWorks helps design and assign badge templates for employee assets. You can assign a badge template and a badge color to each category, to distinguish between the different asset categories.

For selecting a badge template, refer to "Select the badge template" on page 23 in the Employee Category section in this chapter.

Customize field definitions

You can select the fields to be displayed for each asset category in the Front Desk application.

For customizing the fields, refer to "Customize Field Definitions" on page 12 in the Visit Category section in this chapter.

Deliveries category

A normal occurrence at the lobby is the dropping off and picking up of deliveries. LobbyWorks helps you manage the information of all the deliveries made and to be made from the lobby.

When LobbyWorks is installed for the first time, or whenever a site is created, a **Default** delivery category is created. You can modify this category information and add delivery categories.

Adding a delivery category

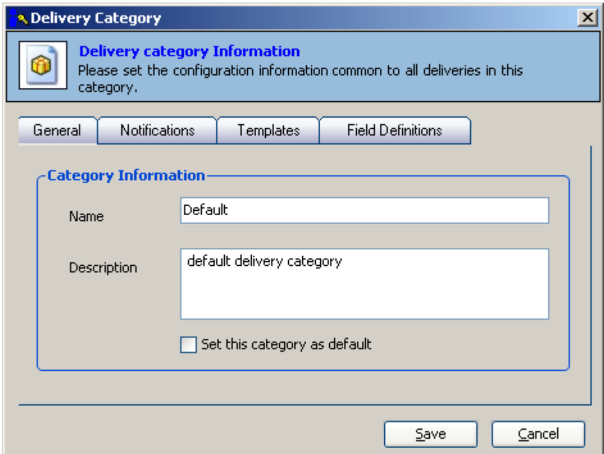
1. Select **Categories** in the navigation area, right-click **Deliveries** in the display area and select **Add**.

   OR

Expand **Categories** in the navigation area, right-click **Deliveries** in the navigation area and select **Add**.

OR

Expand **Categories** in the navigation area and select **Deliveries**. Right-click anywhere in the blank space in the display area and select **Add**. The **Delivery Category** dialog box appears.



2. Type the **Name** of the delivery category.
3. Type a **Description**.
4. Select the **Set this category as default** check box to make this the default category for all the deliveries being registered in the Front Desk, Kiosk, and Web Center applications.
5. Click **Save** to add the new category to the list of delivery categories.

For every delivery category you can:

- Alert an employee, when a delivery is made or when it is picked up
- Select the badge template for the delivery category
- Customize the fields that would appear in the Front Desk application at the time of delivery registration

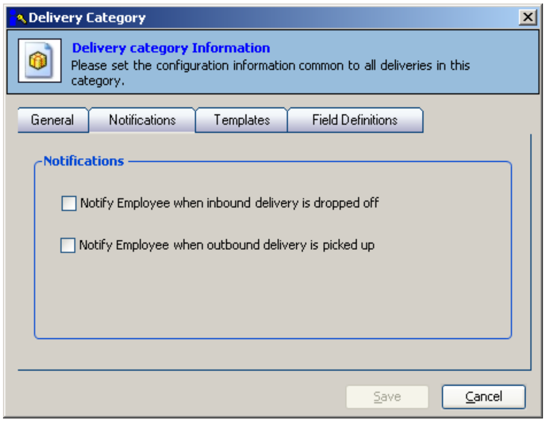
Note: Click the ◄ or ► to view the required, hidden tab.

Enable delivery notification

When a delivery is dropped off for an employee, a notification can be sent to inform the employee about its arrival. Similarly, when a package from an employee is picked up by the recipient, a notification can be sent to the sender. You can enable these options here.

To select the notification options:

1. In the **Delivery Category** dialog box, click the **Notifications** tab.



2. Select the **Notify Employee When Inbound delivery is Dropped Off** check box to inform the employee about an inbound delivery.
3. Select the **Notify Employee When Outbound delivery is Picked Up** check box to inform the employee after an outbound delivery is picked up.
4. Click **Save** to save the settings and close the dialog box.

Select the badge template

LobbyWorks helps design and assign badge templates for deliveries. After designing a unique badge template for each delivery category, you can assign the badge to the delivery category. You can also assign a badge color to distinguish between the different categories.

For selecting a badge template, refer to “Select the badge template“ on page 23 in the Employee Category section in this chapter.

Customize field definitions

You can select the fields to be displayed for each delivery category in the Front Desk application.

You can customize the fields in the **Field Definitions** tab.

For customizing the fields, refer to "Customize Field Definitions" on page 12 in the Visit Category section in this chapter.

Editing a category

To make changes to the pre-defined and user-defined categories:

1. Select the category you want to modify, right-click and select **Modify**.
2. Click the appropriate tab under which the information is to be changed, and make the required changes.
3. Click **Save** to save the changes and close the dialog box.

Copying/Pasting a category

You can create a sub-category by making a copy of an existing one. This avoids entering repetitive information and settings.

Copies of sub-categories can be created across companies and sites and within the same category.

To copy a sub-category:

1. Select the sub-category you want to make a copy of, right-click and select **Copy**.
2. Expand the site where you want to add the replica.
3. Expand **Categories** within the selected site.
4. Expand the specific category where the copied sub-category is to be added.
5. Right-click anywhere in the blank space in the display area and select **Paste**.

Setting a default category

A sub-category can be set as the default for the respective category in the Front Desk application

To set a category as default:

1. Select the category, right-click and select **Set as Default.**

   OR

   Open the **General** tab of the **Category** dialog box and select the option **Set this category as default**.

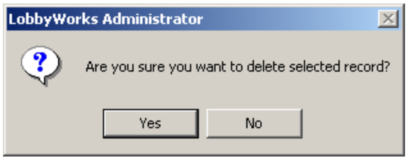
This category now appears as the default sub-category for all the visitors in the Front Desk application.

Deleting a category

You can delete pre-defined and user-defined categories in LobbyWorks. But before deleting a category, ensure that there are no employees defined for the category. If not, the following error message appears:

To delete a category:

1. Select the category you want to delete in the display area, right-click and select **Delete**. The following confirmation message appears:



2. Click **Yes** to delete the selected category. The category is removed from the list of categories.

Scheduler

13

In this chapter...

Overview

The LobbyWorks Scheduler application enables you to schedule the time to perform activities or tasks, and also the intervals at which it must be repeated.

There are some tasks that must be performed by the administrator such as workstation assignment.The database connection settings is done by the Scheduler.

The main tasks performed are:

- Schedule Client Tasks
- Schedule Report Tasks
- Scheduler Server Tasks, see Chapter 19, *Backup and Restore*
- Scheduler Settings

This chapter gives you information on various tasks performed using the Scheduler application.

Schedule client tasks

There are some activities that need to be performed regularly on the Front Desk application. You can schedule the time for these activities or tasks and the intervals at which it must be repeated.

The predefined client tasks in LobbyWorks involve:

- Informing employees about their assets and deliveries
- Managing visitor information
- Updating and importing employee information
- Managing the watch list

You cannot add tasks or delete the existing ones, but you can modify them and schedule them to your requirements. Scheduling a task involves selecting the task options and scheduling them.

Selecting the Task Options

The tasks have some available options, which you can select based on your requirements.

1. Expand **Scheduler** and select **Client Tasks** in the navigation area. The predefined list of tasks appears in the display area.
2. Right-click the task you want to schedule and select **Modify**.
3. Under **Task Options**, make the required changes and settings. The settings vary based on the task you want to schedule. The following table gives you the list of available tasks:

Table 13-1 The list of client tasks you can schedule in LobbyWorks

To schedule...	Refer to...
Asset Task	"Asset task" on page 4 in this chapter.
Employee List Task	"Employee list task" on page 9 in this chapter.
Expired Temporary Host Task	"Expired temporary host task" on page 10 in this chapter.
Visit Task	"Visit task" on page 11 in this chapter.
Visit Decline Task	"Visit decline task" on page 16 in this chapter.
Calendar Synchronization Task	"Calendar synchronization task" on page 17 in this chapter.
Watch Task	"Watch task" on page 18 in this chapter.

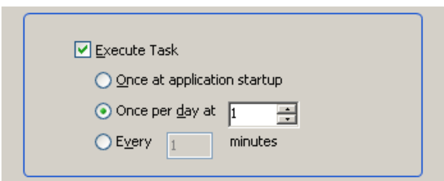
After selecting the task options, you need to assign the time of occurrence for the selected task.

Assigning the timing specifications

For the task selected, you can specify the time at which it should be performed and the intervals at which it must be repeated.

To specify the time:

1. Expand **Scheduler** and select **Client Tasks** in the navigation area. The predefined list of tasks appears in the display area.
2. Right-click any task and click **Modify.** The task scheduler dialog box appears.



3. Select the **Execute Task** checkbox to execute the task. The following options are enabled. Select one of the them to specify the frequency at which the task must be performed:
   - **Once at application startup**: The task is executed each time the application starts.
   - **Once per day at**: The task is executed once a day, at the specified time.

     Example: To perform the task at 10:00 PM everyday, select the option and enter 22:00 in the spin box.
   - **Every... minutes**: The task is executed every few minutes, based on the set value.

     Example: If you select 15 minutes, the task is repeated after an interval of 15 minutes.

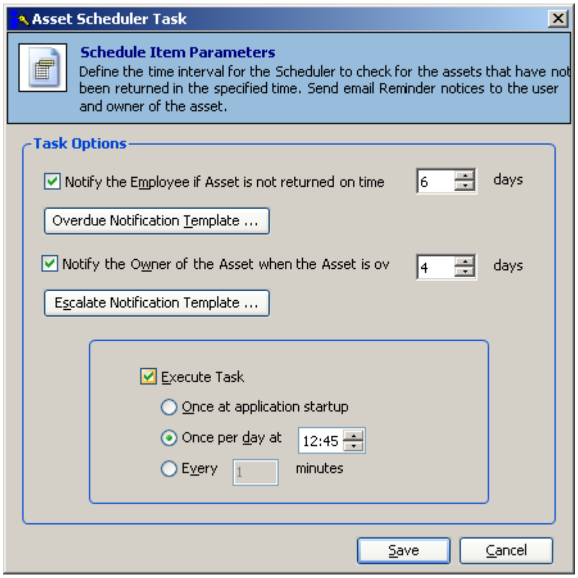
Asset task

The asset task helps manage assets. At the time of registration, the front desk personnel enters the expiry date for returning the asset. In addition, you can schedule an e-mail notification, to inform the asset owner or the asset manager of the company about the violation.

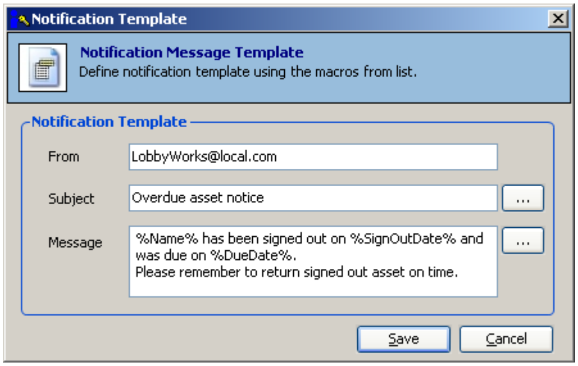
You can have a template for the e-mail, some of which are predefined in LobbyWorks.

To select the available task options:

1. Select **Client Tasks** in the navigation area, right-click **Asset Task** in the display area and select **Modify**. The **Asset Scheduler Task** dialog box appears.



2. To send a notification to employees who fail to return the assets before the expiry period, select the **Notify Employee if Asset isn't returned on time after** check box and select the grace period in the spinbox.
3. To design the template for the notification e-mail, click **Overdue Notification Template...**. The **Notification Template** dialog box appears.



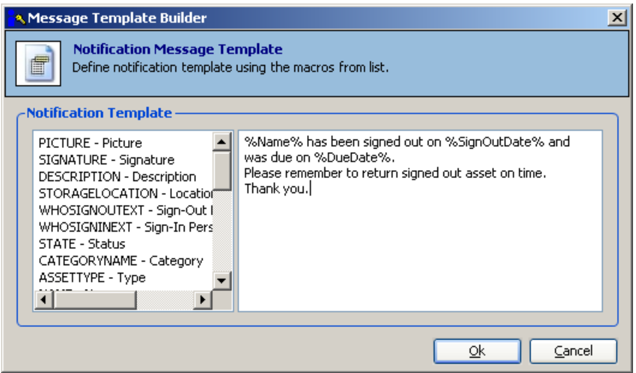
4. Type the following fields:

Table 13-2 Fields in the Notification Template

Field	**Description**
From	Default from address.
Subject	Default subject line.
Message	Default message.
	Insert/Remove placeholders.

5. To insert or remove placeholders:

   a. Click  to open the **Message Template Builder** dialog box.



   b. Select the required placeholder from the left column to add it to the right column.

   c. Repeat step b to add multiple placeholders.

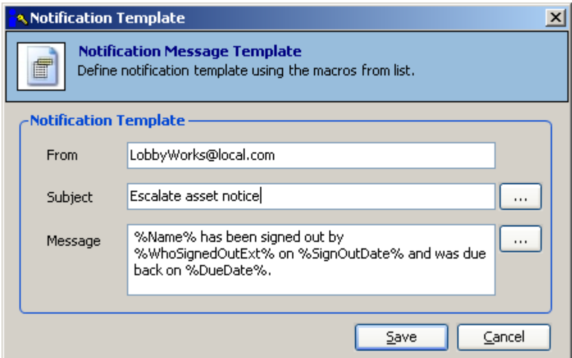
   d. Click **OK** to view the changes to the template.

   Example: If you want to have a subject line that reads “Laptop overdue”, select the appropriate placeholders to make the prototype “**<NAME>** is overdue”.

6. Click **Save** to save the template and close the **Notification Template** dialog box.

7. To inform the asset owners or managers about the violation, select the **Notify Employee When Asset is overdue by** check box and select the grace period in the spinbox.

8. To design the template for the notification e-mail, click **Escalate Notification Template...**. The **Notification Template** dialog box appears.

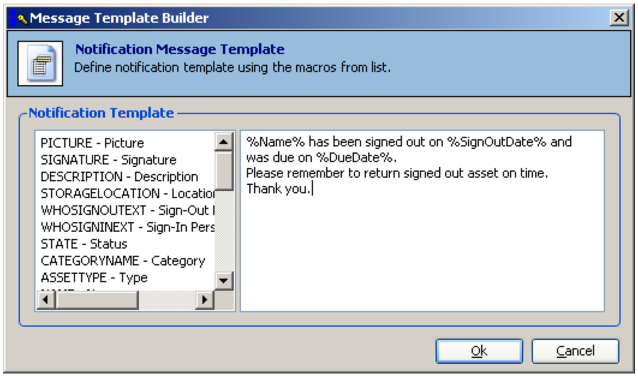


9. Type the following fields:

Table 13-3 Fields in the Notification Template

Field	**Description**
From	Default from address.
Subject	Default subject line.
Message	Default message.
...	Insert/Remove placeholders.

10. To insert or remove placeholders:
    a. Click ... to open the **Message Template Builder** dialog box.



b. Select the required placeholder from the left column to add it to the right column.

c. Repeat step b to add multiple placeholders.

d. Click **OK** to view the changes to the template.

Example: If you want to have a subject line that reads “Laptop overdue”, select the appropriate placeholders to make the prototype “**<NAME>** is overdue”.

11. Click **Save** to save the template and close the **Notification Template** dialog box.

12. Click **Save** to save the asset notification settings.

This completes the option selection for the asset task. Specify the date and interval at which this task is to be repeated, to complete the asset task configuration.

For scheduling the task, refer to “Assigning the timing specifications“ on page 3 in this chapter.

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Employee list task

LobbyWorks can be configured to import employee information from the company's active directory. This information needs to be updated periodically to manage:

- changes in existing employee information like their departments and phone numbers
- information of employees who join/leave the company

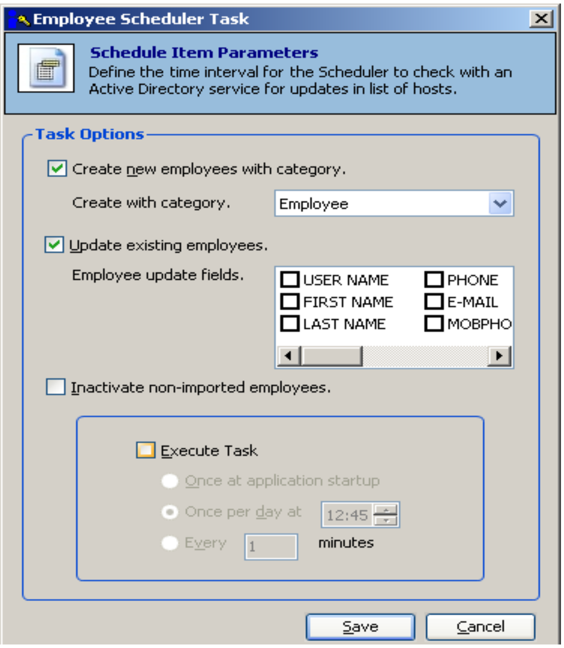
When employees leave a company, their information is deleted from the company's active directory. In LobbyWorks, you can set these employees as inactive. This ensures that their information is unavailable for visit, asset or delivery registrations at the Front Desk.

You can schedule a task to import the employee information to:

- update the selected employee fields
- add information of new employees and assigns them to the selected category
- Inactivates the existing non-imported employees

To select the available task options:

1. Select **Client Tasks** in the navigation area, right-click **Employee list Task** in the display area and select **Modify**. The **Employee Scheduler Task** dialog box appears.



2. To assign a default category to the employees who are imported:
   a. Select the **Create new employees with category** checkbox.
   b. Select the employee category in **Create with category.**
3. To update the existing employee information:
   a. Select the **Update existing employees** checkbox.
   b. Select the employee fields you want to update from the **Employee update fields** list. You can update the employee's **UserName**, **FirstName**, **LastName**, **Phone**, **E-mail**, **Mobile-Phone**, **Pager**, and **Department** information.
4. Select the **Inactive non-imported employees** checkbox to set inactive the non-imported employees.
5. Click **Save** to save the employee import settings.

This completes the option selection for the task of importing employee information. Specify the date and interval at which this task is to be repeated, to complete the employee list task configuration.

For scheduling the task, refer to "Assigning the timing specifications" on page 3in this chapter.

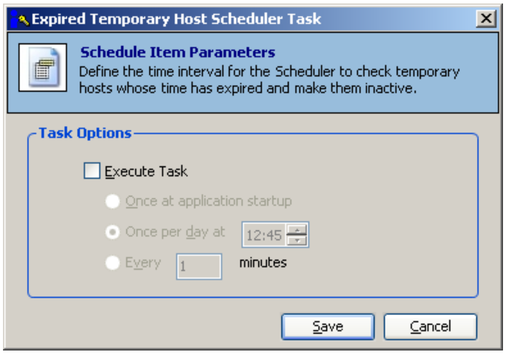
Expired temporary host task

At times, there exist new employees, whose information has not been added to the LobbyWorks database. Before the database is updated, these employees may have visitors. In the absence of any employee information, the front desk personnel assign these hosts to the **Temporary Host** category.

Once the visit expires, the validity of the hosts is checked and de-activated. This task can be scheduled using the **Expired Temporary Host Scheduler Task** dialog box. There are no task options available for this task.

To schedule this task:

1. Select **Client Tasks** in the navigation area, right-click **Expired Temporary Host Task** in the display area and select **Modify**. The **Expired Temporary Host Scheduler Task** dialog box appears.



2. Select the **Execute Task** checkbox to execute the task. The following options are enabled. Select one of the them to specify the frequency at which the task must be performed:
   - **Once at application startup**: The task is executed each time the application starts.
   - **once per day at**: The task is executed once a day, at the specified time.

     Example: To perform the task at 10:00 PM everyday, select the option and enter 22:00 in the spin box.
   - **every... minutes**: The task is executed every few minutes, based on the set value.

     Example: If you select 15 minutes, the task is repeated after an interval of 15 minutes.
3. Click **Save** to save the schedule.

Visit task

At the Front Desk, visits are created and badges are printed to identify the visitors. After the visit duration expires, the corresponding visit and visitor information must be organized. You can schedule the following tasks to manage this information:

- sign out all the signed in visitors
- check for all the expired visits and close them
- check for signed in visitors, exceeding their visit duration and
  a. add them to the visitor watch list
  b. notify their hosts about the violation
  c. send notifications to visitors informing them about the violation

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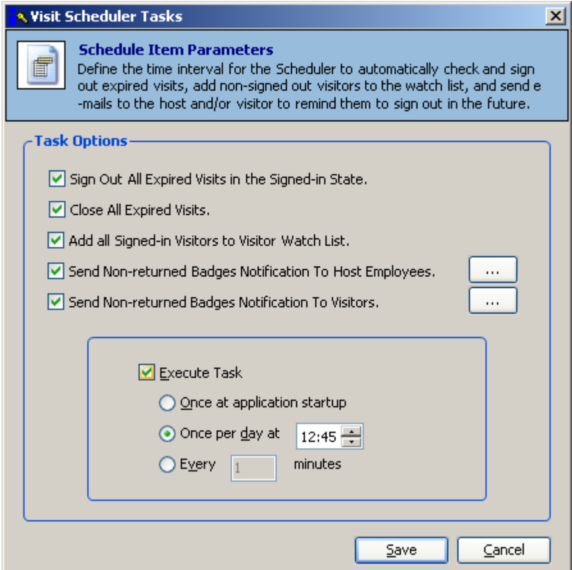
To select the available task options:

1. Select **Client Tasks** in the navigation area, right-click **Visit Task** in the display area and select **Modify**. The **Visit Scheduler Task** dialog box appears.



2. To automatically sign out visitors who have exceeded the visit duration, select the **Sign Out All Signed In Visits** checkbox.
3. To automatically close all the expired visits, select the **Close All Expired Visits** checkbox.
4. To automatically add the signed in visitors who have exceeded the visit duration to the Watch List, select the **Add into Visitor Watch List All Signed In Visitors** checkbox.
5. To inform the hosts about the violation of company policy by their visitors, select the **Send Non-returned Badges Notification To Host Employees** checkbox.
6. To design the notification template, click .... The **Notification Template** dialog box appears.

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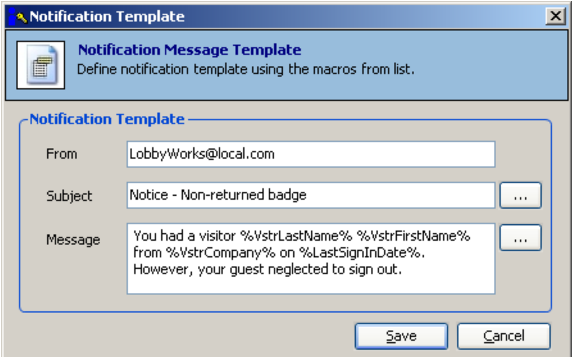
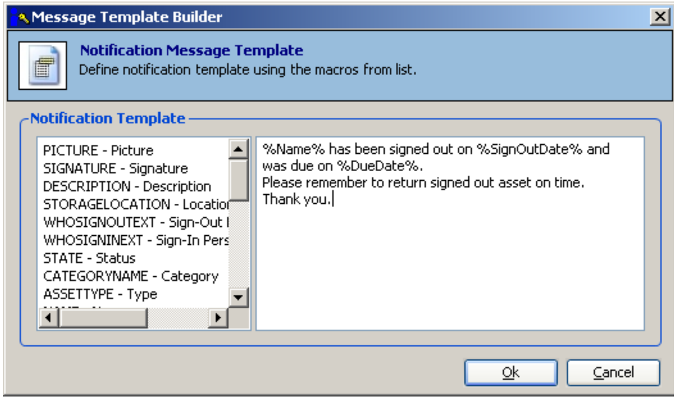


7. Type the following fields:

Table 13-4 Fields in the Notification Template

Field	**Description**
From	Default from address.
Subject	Default subject line.
Message	Default message.
...	Insert/Remove placeholders.

8. To insert or remove placeholders:
   a. Click ... to open the **Message Template Builder** dialog box.



b. Select the required placeholder from the left column to add it to the right column.

c. Repeat step b to add multiple placeholders.

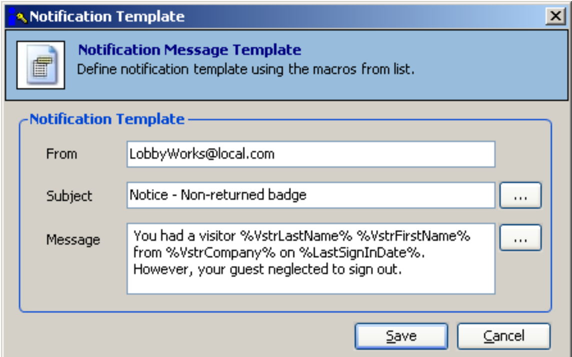
d. Click **OK** to view the changes to the template.

Example: If you want to have a subject line that reads "Mr/Ms Reeds your visitor Mr/Ms Black left on 5/10/2006 without returning the badge", select the appropriate placeholders to make the prototype "Mr/Ms **<HOSTLASTNAME>** your visitor Mr/Ms **<VSTRLASTNAME>** left on **<LASTSIGNINDATE>** without returning the badge"

9. Click **Save** to save the template and close the **Notification Template** dialog box.

10. To inform the visitors about the company policy, select the **Send Non-returned Badges Notification To Visitors** checkbox.

11. To design the notification template, click . The **Notification Template** dialog box appears.



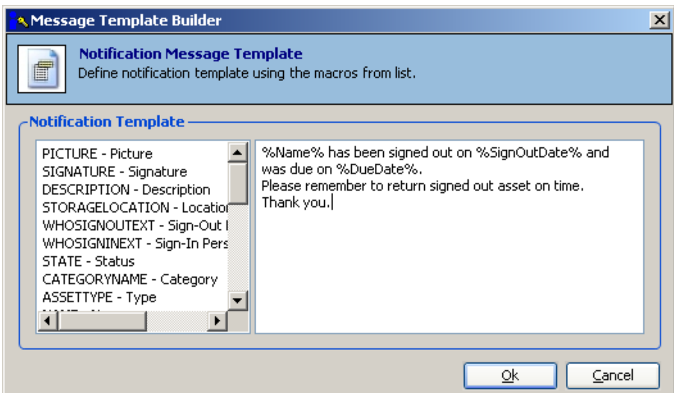
12. Type the following fields:

Table 13-5 Fields in the Notification Template

Field	Description
From	Default from address.
Subject	Default subject line.
Message	Default message.
...	Insert/Remove placeholders.

13. To insert or remove placeholders:

    a. Click ... to open the **Message Template Builder** dialog box.



b. Select the required placeholder from the left column to add it to the right column.

c. Repeat step b to add multiple placeholders.

d. Click **OK** to view the changes to the template.

Example: If you want to have a subject line that reads "Mr/Ms Reeds you visited Honeywell on 5/10/2006 but left without returning the badge", select the appropriate placeholders to make the prototype "Mr/Ms **<VSTRLASTNAME>** you visited **<HOSTCOMPANY>** on **<LASTSIGNINDATE>** but left without returning the badge"

14. Click **Save** to save the template and close the **Notification Template** dialog box.

15. Click **Save** to save the visit task selections.

Specify the date and interval at which this task is to be repeated, to complete the visit task configuration.

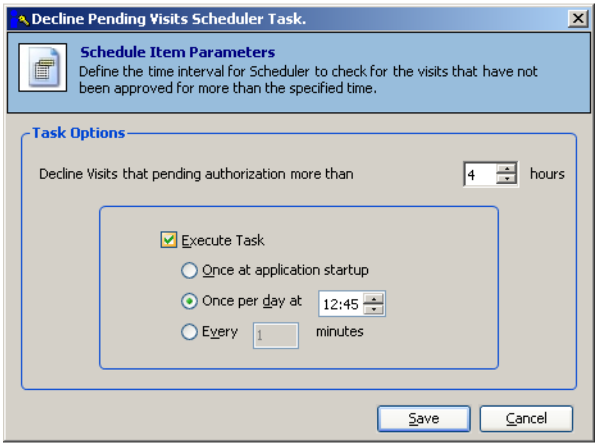
For scheduling the task, refer to "Assigning the timing specifications" on page 3 in this chapter.

Visit decline task

After registration, based on the category settings, the visitor must be authorized. If the visitor is required to be authorized by the host, a notification is sent to the host. The front desk personnel await a response from the host for a specified wait period. In the absence of a response within this period, you can schedule a task to automatically decline the visit. This is applicable for the authorization category only.

To make the task selection:

1. Select **Client Tasks** in the navigation area, right-click **Visit Decline Task** in the display area and select **Modify**. The **Decline Pending Visits Scheduler Task** dialog box appears.



2. Enter the number of hours in the spin box to specify the wait period before cancelling the visit. When the wait period exceeds this value, the visit is declined.

3. Click **Save** to save the time setting.

Specify the date and interval at which this task is to be repeated, to complete the cancellation of the visit task.

For scheduling the task, refer to "Assigning the timing specifications" on page 3 in this chapter.

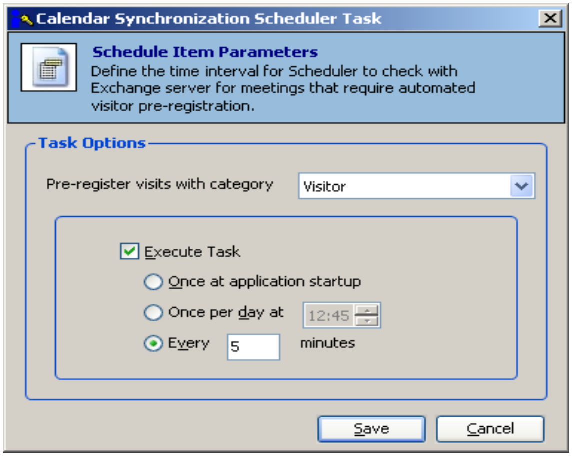
Calendar synchronization task

This task enrolls the visitors who attend a particular meeting, you can enable the meeting request by sending the e-mail id and pre-registers them automatically. You can schedule this task to be performed after a specific interval.

For providing the information to enable the Administrator to synchronize with the employee calendar, refer to "Integrating Calendar Information" on page 4 in the Profile Management chapter.

To select the task option:

1. Select **Client Tasks** in the navigation area, right-click **Calendar Synchronization Task** in the display area and select **Modify**. The **Calendar Synchronization Scheduler Task** dialog box appears.



2. Select the category of visitors for which pre-registration should happen automatically.
3. Select the **Execute Task** checkbox to execute the task. The following options are enabled. Select one of the them to specify the frequency at which the task must be performed:
   - **once at application startup**: The task is executed each time the front desk personnel logs onto the application.
   - **once per day at**: The task is executed once a day, at the specified time.

     Example: To perform the task at 10:00 PM everyday, select the option and enter 22:00 in the spin box.
   - **every... minutes**: The task is executed every few minutes, based on the set value.

     Example: If you select 15 minutes, the task is repeated after an interval of 15 minutes.
4. Click **Save** to save the category selection.

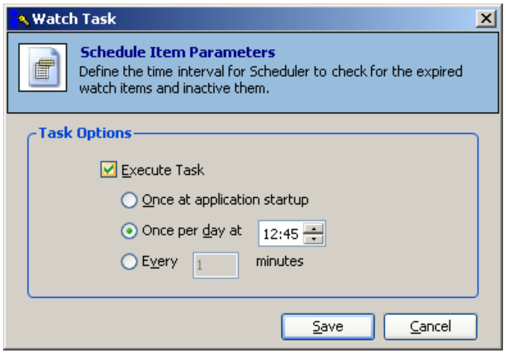
Watch task

Any suspicious visitor or package can be added to a watch list at the front desk personnel's discretion. This task checks for any expired items in the watch list and enables the front desk personnel to render them inactive, after expiry.

You can specify the time interval at which this task is to be repeated. This task has no options available.

To schedule this task:

1. Select **Client Tasks** in the navigation area, right-click **Visit Expired Notification Task** in the display area and select **Modify**. The **Visit Expired Scheduler Task** dialog box appears.



2. Select the **Execute Task** checkbox to execute the task. The following options are enabled. Select one of the them to specify the frequency at which the task must be performed:
   - **once at application startup**: The task is executed each time the front desk personnel logs onto the application.
   - **once per day at**: The task is executed once a day, at the specified time.

     Example: To perform the task at 10:00 PM everyday, select the option and enter 22:00 in the spin box.
   - **every... minutes**: The task is executed every few minutes, based on the set value.

     Example: If you select 15 minutes, the task is repeated after an interval of 15 minutes.
3. Click **Save** to save the schedule.

Schedule report tasks

The information of any visitor or package, entering the premises is entered into the LW database, through the Front Desk application. Using this data, you can generate reports to review and monitor the visitor management system.

Reports are generated for **Visitor**, **Event / Group Visit**, **Visitor Watch List**, **Host**, **Delivery**, and **Asset** categories.

You can generate a report for:

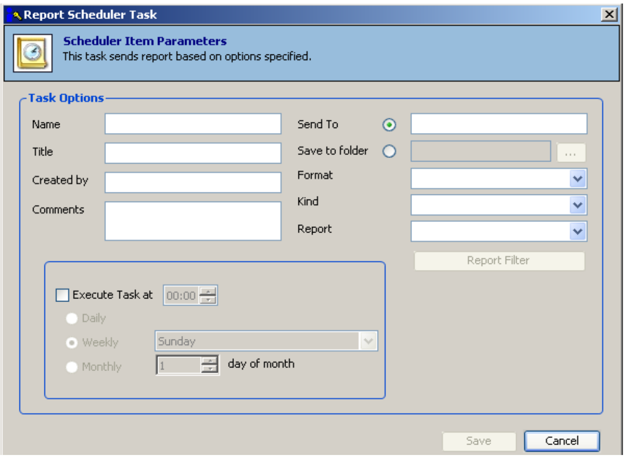
- the visitors entering the premises
- visiting groups
- any activity on the watch list
- the hosts and employees details and activities
- the inbound and outbound deliveries
- the assets registered at the Front Desk

Generating a report is called a report task in LobbyWorks. There are no predefined report tasks in LobbyWorks. So you can add report tasks based on your requirements, modify them, and delete them when not required.

The generated reports can be saved in a folder or an e-mail can be sent to the required person. In addition, the report tasks can be scheduled to occur at specific intervals of time. Normally, reports are generated on a weekly or monthly basis. However, this can be customized.

Adding a report task

1. Expand **Scheduler** and select **Report Tasks** in the navigation area. Right-click anywhere in the blank space in the display area and select **Add**. The **Report Task Scheduler** dialog box appears.



2. Type the **Name** of the report task for which the report is required.
3. Type the **Title** for the report.
4. Type your name or designation in the **Created by** field.
5. Type comments, if you have any, in the **Comments** field.
6. Select the **Send To** option if you want to mail the report, and type the recipient's e-mail address in the adjacent field.

   OR

   Select **Save to folder** if you want to save the report. You can Type the destination address in the adjacent field.

   To browse to the folder:

   a. Click ... to open the **Browse for folder** dialog box.

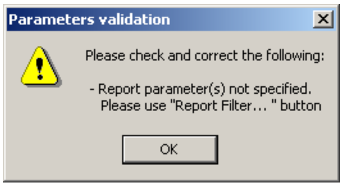
   b. Browse to the required location and select the folder where you want to save the report.

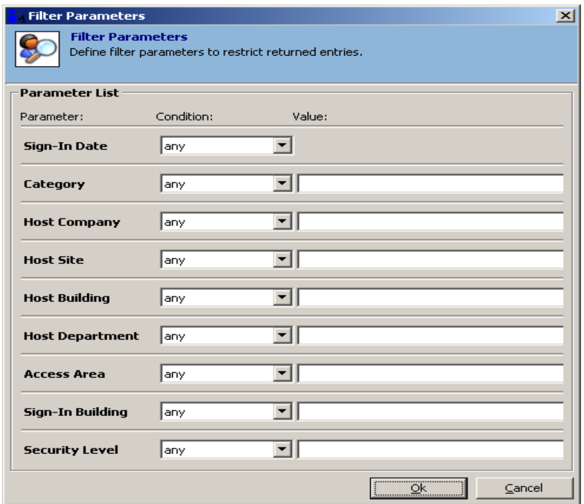
   c. Click **OK** to save the setting.

Note: Selecting one of the two options is mandatory.

7. Select the format type for the report in **Format**. The formats available are HyperText(*.html), Rich Text(*.rtf). Adobe PDF(*.pdf) and comma-separated(*.csv).
8. Select the **Kind** of the report from the list of available report types.
9. Select a criterion for the **Report**. The list displayed here, depends on the report type you select under **Kind**.
10. To filter the fields displayed in the report, based on the information you require, click **Report Filter.** The **Filter Parameters** dialog box appears.

Note: The filter parameters depend on the criterion you select for the report. It is mandatory to specify the filter parameters. When not done, the following error message appears:





a. In the **Parameter List**, all the fields relevant to the selected report are listed. Select the criteria and values to search for the required records based on the following information:

Table 13-6 Options available to select the report filter criteria

Option	Description
Condition	The criterion to search for the records related to the parameter. The default condition is **any**.
Value	The letter, word, phrase, or numeric expression to search for.

b. Click **OK** to save the filter options.

Note: The report task appears disabled till you schedule it for a particular time.

11. Select the **Execute Task At** checkbox to schedule the report generation.
    - Set the time at which you want the report to be generated.
12. Select one of the following options:
    - **Daily**: generates a daily report for the criteria you selected
    - **Weekly**: generates a weekly report on the selected day
    - **Monthly**: generates a report on the selected day, every month
13. Click **Save** to save the scheduled report task.

Editing the report task

1. Expand **Scheduler** and select **Report Tasks** in the navigation area. The report tasks are listed in the display area.
2. Select the report task you want to edit, right-click and select **Modify**. The **Report Scheduler Task** dialog box appears.
3. Make the required changes.
4. Click **Save** to save the changed settings.

Deleting the report task

1. Expand **Scheduler** and select **Report Tasks** in the navigation area. The report tasks are listed in the display area.
2. Right-click the task you want to delete and select **Delete**. A confirmation message appears.
3. Click **Yes** to delete the report task.

Scheduler settings

The scheduler settings enable you to configure the database and advanced settings provided in the scheduler application.

To Start the Scheduler

1. Click **Start** >**Program** > **LobbyWorks** > **Scheduler** or double-click the **Scheduler** shortcut on the desktop.

After logging on, the Lobbyworks Scheduler application runs in background and the icon is visible in the system tray. Right-click the icon to view the scheduler settings.

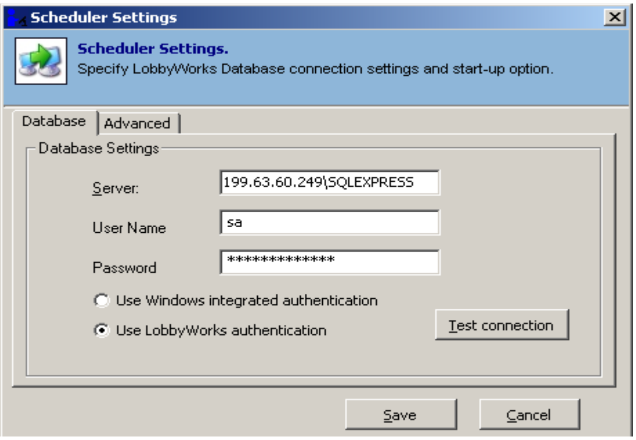
System Tray Menu

Database settings

The LobbyWorks Scheduler connected to the LobbyWorks database. You can provide the server information and also the user credentials.

To specify the database information:

1. Right-click the icon in the system tray, and click **Settings**. The **Scheduler Settings** dialog box appears.
2. Click the **Database** tab.



3. In the **Server** box, type the name of the server in which the LobbyWorks database resides.
4. Select one of the following authentication options for logging onto the database:
   - Select **Use Windows integrated authentication**, if the credentials for logging on to Windows must be used for logging on to the database.
   - Select **Use LobbyWorks authentication,** if the SQL Server user name and password must be used for accessing the Commander database.
5. Type the **Username** and **Password.**
6. Click **Test Connection** to verify the connection with the database.
7. Click **Save** to save the settings.
8. Click the **Advanced** tab and select the checkbox, if you want the scheduler application to start automatically when the computer is switched on.

Lists

14

In this chapter...

Overview

At the front desk, personnel enter the necessary visitor information to create a visit and register the visitor. The mandatory entries include:

- unique information like the visitor's name, address, and so on
- common information like the purpose of the visit, visit category, and so on

In the Administrator, you can predefine values for the:

- unique name field by creating aliases for visitor names
- common visit purpose field by defining visit purposes

The personnel at the front desk can fill these fields by selecting one of the predefined values. This quickens registration process and in turn reduces the wait time for the visitors.

You can add, modify, and/or delete visit purposes and aliases.

Note: After altering the values, restart the LobbyWorks Front Desk application for the changes to take effect.

Visit purposes

Entering the purpose of the visit is mandatory for registering a visitor at the Front Desk. You can predefine the reasons for a visit in the Administrator which can be selected by the front desk personnel during registration.

The following visit purposes are available by default:

- Interview
- Meeting
- On-site work
- Personal

Adding a visit purpose

1. Expand **Lists** in the navigation area, right-click **Visit Purposes** and select **Add**. The **Purpose** dialog box appears.

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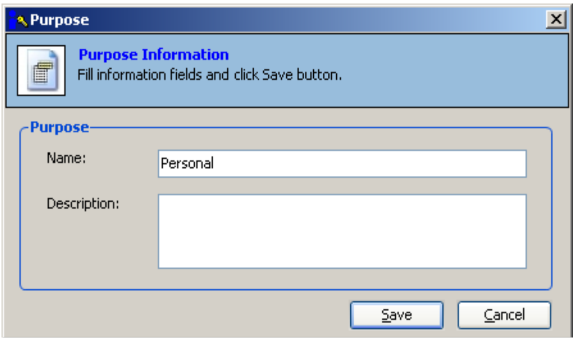


2. Type the **Name** and **Description** for the visit purpose.
3. Click **Save** to save the new visit purpose.

Editing a visit purpose

1. Expand **Lists** and select **Visit Purposes** in the navigation area. A list of all the available visit purposes appears in the display area.
2. Right-click the purpose you want to edit, and select **Modify**.
3. Change the required information.
4. Click **Save** to save the changes made to the purpose.

Deleting a visit purpose

1. Expand **Lists** and select **Visit Purposes** in the navigation area. A list of all the available visit purposes appears in the display area.
2. Right-click the purpose you want to delete, and select **Delete**. A confirmation message appears.
3. Click **Yes** to delete the selected visit purpose.

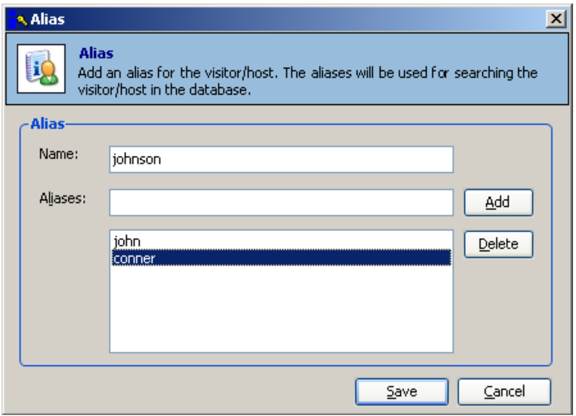
Aliases

In the Administrator, aliases can be provided for the first or last names of visitors. At the Front Desk, when the personnel enter the alias, LobbyWorks maps it to visitors' names in the database. This is called name matching. And as a result of this, the visitor's name gets populated automatically.

You can add aliases to LobbyWorks, modify and delete them.

Adding an alias

1. Expand **Lists** in the navigation area, right-click **Aliases** and select **Add**. The **Alias** dialog box appears.



2. Type the **Name** of the visitor.
3. Type the alias in **Aliases**.
4. Click **Add** to add the alias to the list.
5. Click **Delete** to remove the selected alias form the list.
6. Click **Save** to save the alias.

Editing an alias

1. Expand **Lists** and select **Aliases** in the navigation area. A list of all the available aliases appears in the display area.
2. Right-click the alias you want to edit, and select **Modify**.
3. Change the required information.
4. Click **Save** to save the changes to the alias.

Deleting an alias

1. Expand **Lists** and select **Aliases** in the navigation area. A list of all the available aliases appears in the display area.
2. Right-click the alias you want to delete, and select **Delete**. A confirmation message appears.
3. Click **Yes** to delete the selected alias.

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Colors

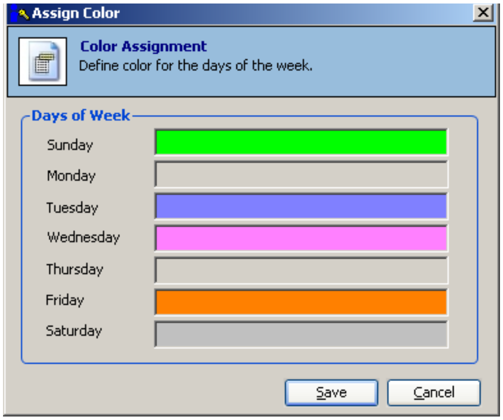
LobbyWorks has a list of colors for all the days of the week. These colors can be set to print badges with different colors on different days of the week. You can modify the colors assigned to the days of the week by customizing and defining colors. The assigned colors are applicable to badges of all visitor categories.

In addition, you can set badge color in template tab in the visit category dialog box. A new badge color can be set in the template tab, which overrides the color defined in the Assign Color dialog box.

Assigning colors to days

To assign a color:

1. Expand **Lists** and select **Colors** in the navigation area.
2. Right-click **Colors** and select **Modify**. The **Assign Color** dialog box appears.



   a. Click anywhere in the field to open the **Color** dialog box.

b. From the **Basic colors** palette, select the color you want to use for the field.

c. To define a custom color, click **Define Custom Colors** and specify the color combination in the **Color** dialog box.

d. Click **OK** to apply the color and exit from the **Color** dialog box.

For defining custom colors, refer to "Define a Custom Color" on page 10 in **Categories** chapter.

3. Click **Save**.

Additional Settings

15

In this chapter...

Overview

Configuring the additional settings in LobbyWorks provides extra features such as:

- Controlling visitor access, in the absence of an access control system.
- Displaying links to websites with useful information for a visitor, in the Kiosk.
- Customizing the fields to be displayed for each category, in the Front Desk.
- Sending notification e-mails from LobbyWorks.
- Enabling PACS Integration.
- Enabling super user options

Note: These settings are not mandatory for the working of the application.

Clearance codes

Clearance code refers to a specific area within the premises, that a visitor is allowed access to.

When integrated with Pro-Watch®, the clearance codes are imported to the LobbyWorks database. In the Front Desk, the list of codes appears in the **Clearance Code** field. The personnel can select a code and assign it to a visitor, allowing access only to the corresponding area. The code can then be printed on visitor badges.

Note: When you integrate LobbyWorks with Pro-Watch®, the access level information is imported to the database.

ACS access cards

In the Front Desk, access cards can be uniquely assigned to visitors and the numbers can be printed on their badges. This helps in monitoring and controlling visitor access within the premises. It displays the different card such as

- cards assigned to the visitors
- cards lost by the visitors
- temporary card assigned to the employees

Note: When you integrate LobbyWorks with Pro-Watch®, the access card information is imported to the database.

Security levels

A visitor can be a contractor, a service technician, an interview candidate, a guest speaker for a conference, and so on. To ensure the security of the premises and safety of the employees, you can assign each visitor to an appropriate security level.

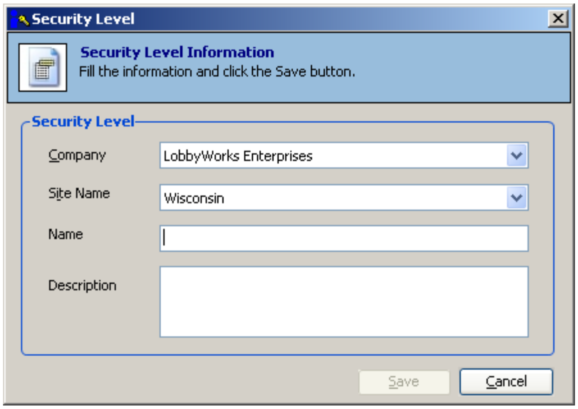
There are two predefined security levels in LobbyWorks Administrator:

- Escort Required: the host must accompany the visitor, within the premises.
- Escort Not Required: the host need not accompany the visitor.

The security level can be printed on the visitor's badge.

Adding a security level

1. In the navigation area, select a **Company** and the **Site** to which you want to add a security level.
2. Right-click **Security Level** in the display area, and select **Add**. The **Security Level** dialog box appears.



3. The following table provides you the details about the information you must enter in the appropriate text boxes.

Table 15-1 Security Level details

Name	Action
Company	Select the company from the drop-down box.
Site Name	Select the name of the site from the drop-down box.

Name	Action
Name	Type a name for the security level.
Description	Type a description for the security level.

4. Click **Save** to add the security level to the LobbyWorks database.

Editing a security level

1. In the navigation area, select a **Company** and the **Site**, whose security levels you want to edit.
2. Double-click **Security Level** in the display area. The list of available security levels appears.
3. Right-click the security level you want to edit, and select **Modify**. The **Security Level** dialog box appears.
4. Modify the required details.
5. Click **Save** to save the changes to the security level.

Deleting a security level

1. In the navigation area, select a **Company** and the **Site**, whose security levels you want to delete.
2. Double-click **Security Level** in the display area. The list of available security levels appears in the display area.
3. Right-click the security level you want to delete, and select **Delete**. A confirmation message appears.
4. Click **Yes** to delete the selected security level from LobbyWorks.

Links

The Administrator allows you to add links or addresses of relevant websites, which can be accessed by the visitor, at the Kiosk. Links provide information about the company to the visitor. They are displayed as icons in the Kiosk application.

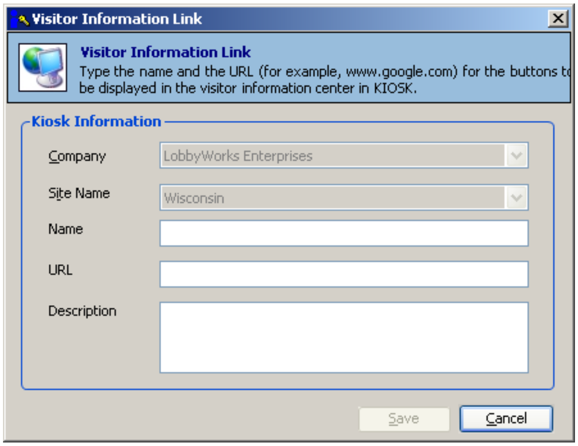
There are two predefined links.

- **Home**: opens the company's website.
- **Search**: opens the Google search page.

You can create links, modify them, and delete the irrelevant ones.

Adding a link

1. In the navigation area, select a **Company** and the **Site** to which you want to add a link.
2. Right-click **Links** in the display area, and select **Add**. The **Visitor Information Link** dialog box appears.



3. The following table provides you the details about the information you must enter in the appropriate text boxes.

Table 15-2 Link details

Name	Action
Company	Select the company from the drop-down box.

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Name	Action
Site Name	Select the name of the site from the drop-down box.
Name	Type a name for the link. Example: Local Tourist Guide
URL	Type the address of the website.
Description	Type a description for the Link.

4. Click **Save** to add the link to LobbyWorks.

Editing a link

1. In the navigation area, select a **Company** and the **Site**, whose links you want to edit.
2. Double-click **Links** in the display area. The list of available links appears in the display area.
3. Right-click the link you want to edit, and select **Modify**. The **Visitor Information Link** dialog box appears.
4. Modify the required details.
5. Click **Save** to save the changes to the link.

Deleting a link

1. In the navigation area, select a **Company** and the **Site**, whose links you want to delete.
2. Double-click **Links** in the display area. The list of available links appears in the display area.
3. Right-click the link you want to delete, and select **Delete**. A confirmation message appears.
4. Click **Yes** to delete the selected link from LobbyWorks.

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Custom fields

You can configure the fields to be displayed at the Front Desk by:

- Selecting the fields and their values.
- Adding custom fields.

For selecting the fields, refer to the "Customize Field Definitions" on page 12 section in the Categories chapter.

Note: Custom fields are site and category specific.

Adding custom fields

You can create a maximum of ten custom fields for each of the four categories namely, Visits, Employee, Assets, and Deliveries. The custom field appears with the description, at the Front Desk.

To create a custom field:

1. In the navigation area, select a **Company** and the **Site** to which you want to add custom fields.
2. Double-click **Custom Fields** in the display area. The four categories appear in the display area.
3. Right-click the category to which you want to add custom fields, and select **Modify**. The **Custom Fields** dialog box appears.

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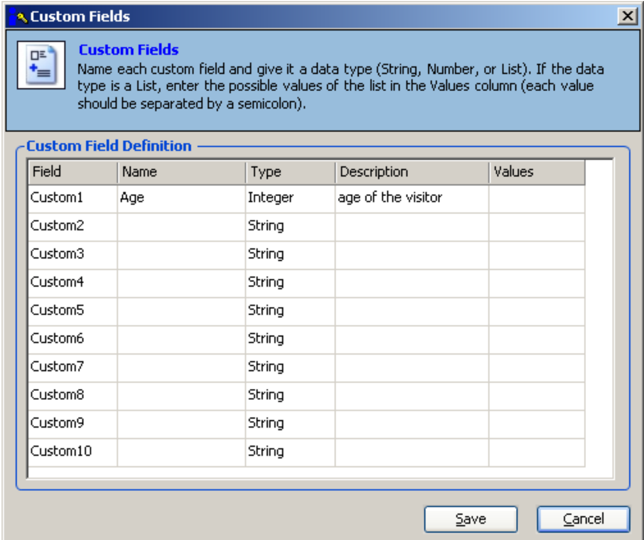


4. In the **Name** column, type a name for the custom field you want to create.
5. In the **Type** column, select the type of data the field must hold. The available data types are:
    - Integer
    - String
    - List
6. In the **Description** column, type a description for the field, to be displayed at the Front Desk.
7. In the **Values** column, type the values for the field separated by a semi-colon. This is applicable only for fields assigned to the List data type.
8. Click **Save** to save the custom field.

Templates

Using the Administrator, you can define templates for notifying the host through e-mail, and/or phone. The defined phone and e-mail templates are used for sending notification alerts to hosts on the arrival of their visitors.

Mail template

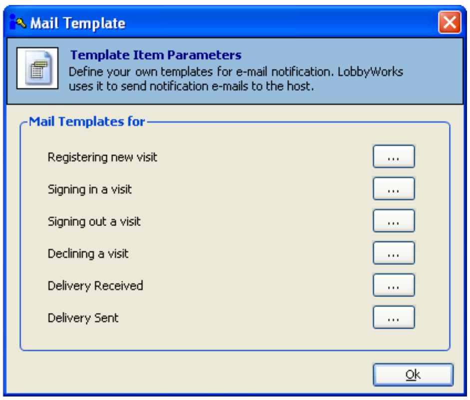
The Administrator enables you to define templates for e-mail notification.

You can specify e-mail template settings to notify the host about the following:

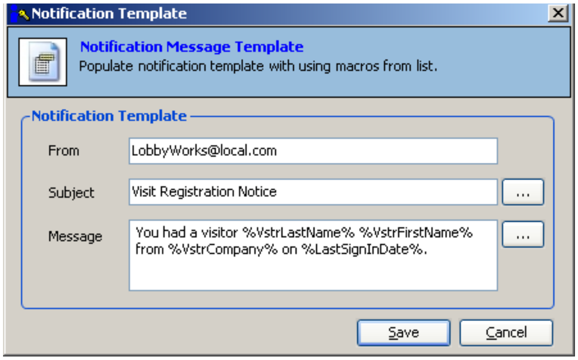
- Registering visitors
- Sign-in visitors
- Sign-out visitors
- Decline visiting rights to visitors

To define the e-mail template:

1. In the navigation area, select a **Company** and the **Site** for which you want to define the e-mail template.
2. Click **Notification templates** in the navigation area. The Phone Template and Mail Template appears.
3. Right-click **Mail Template** and select **Modify**. The **Mail Template** dialog box appears.



4. Click ... next to the Mail Template you want to design. The **Notification Template** dialog box appears.



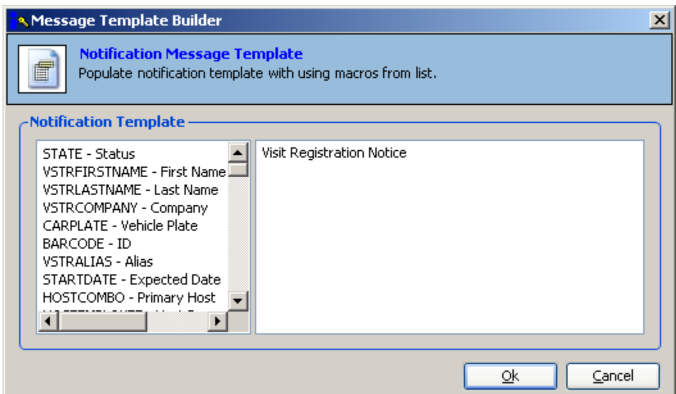
5. Type the following details:

Table 15-3 Notification Template details

Name	Description
From	Default from address.
Subject	Default subject line.
Message	Default message.
...	Insert/Remove placeholders.

6. To insert or remove placeholders:

   a. Click ... to open the **Message Template Builder** dialog box.



b. Select the required placeholder from the left column to add it to the right column.

c. Repeat step b to add multiple placeholders.

d. Click **OK** to view the changes to the template.

Example: If you want to have a subject line that reads “Kenneth Williams Registration Notice”, select the appropriate placeholders to make the prototype “<**VSTRFIRSTNAME > < VSTRFIRSTNAME >** Registration Notice”.

7. Click **Save** to save the template and close the **Notification Template** dialog box.

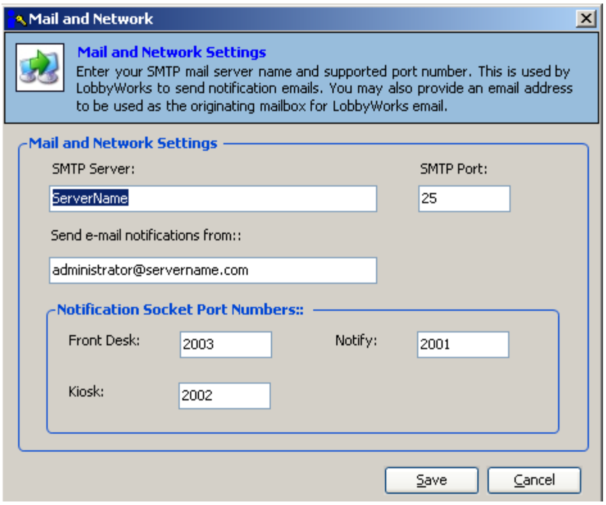
8. Click **OK** to close the **Mail Template** dialog box.

Mail and network settings

LobbyWorks requires network information such as server name and port numbers to send notification e-mails and Notify alerts. LobbyWorks Administrator uses the specified server and port details to communicate with the Front Desk, Notify and Kiosk applications.

To configure the mail and network settings:

1. Expand **Advanced Configuration** in the navigation area and select **Mail and Network**. The **Mail and Network Parameters** option appears in the display area.
2. Right-click **Mail and Network Parameters** and select **Modify**. The **Mail and Network** dialog box appears.



3. Type the **SMTP Server** name and **SMTP Port** number.
4. In **Send e-mail notifications from**, type the address to be displayed in the From field of all notification e-mails sent from LobbyWorks.
5. Type the port numbers to be assigned to the Front Desk, Notify, and Kiosk applications.
6. Click **Save** to save the notification e-mail and network settings.

Note: LobbyWorks loads the network settings on startup. Therefore, after making changes to the settings, restart the client applications such as Front Desk, Kiosk, and Notify for the new settings to take effect.

PACS integration settings

The SmartPlus® application integrates Pro-Watch® and LobbyWorks. So the SmartPlus® URL must be provided in LobbyWorks to initiate the process. During integration, the company, employee, and clearance code information stored in the Pro-Watch® database can be imported to the LobbyWorks database, based on your selection.+

For more information about the PACS Integration dialog box, refer to the section “Step 6: Initiating the integration from LobbyWorks“ on page vi in Appendix A.

The **PACS Integration** dialog box appears.

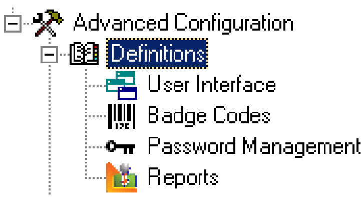
Enabling super user privileges

The super user privileges enables you to view and modify the report, and user interface templates such as Front Desk and Kiosk. You must enable the super user privilege before modifying the templates.

Warning: Do not modify the template unless instructed by the technical support.

To enable the super user privileges

1. Open LobbyWorks.config file.
2. Locate <add key="SuperUser" value="0" />
3. Change the value from 0 to 1 inside the double quotes across the word value. By default, the value is 0.
4. Save the file.
5. Restart LobbyWorks Administrator.
6. Expand **Advanced Configuration** and **Definitions** to verify the changes as shown in the following figure.



After changing the value, the User Interface and Reports are also displayed.

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Badges

16

In this chapter...

Overview

Badges contain all the unique information necessary to identify a visitor, asset or delivery. Badge codes are barcodes printed on badges to increase the accuracy and speed of the identification process. Badge templates decide the outline for the badge. You can configure the template, assign it to a badge and then customize it to suit your requirements.

LobbyWorks enables you to:

- Design badge layout templates
- Create badges by assigning templates to them

LobbyWorks has predefined badges and templates. After installation, you can use these available badges to reduce your initial setup time.

Configure layout templates

The layout or badge template defines the appearance of a badge. The template holds all important information relevant to a badge and can be customized. In addition, for a premises with multiple companies, you can design company-specific badge templates.

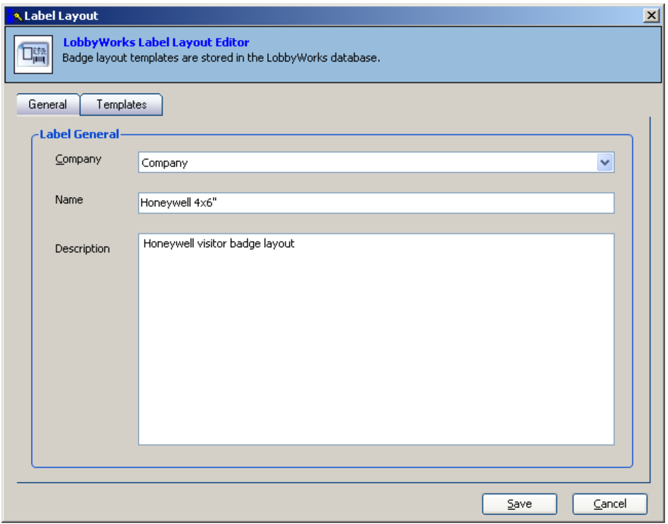
The area within a badge that contains text or graphics is termed as a **Control**. A control can be a **Barcode**, **Label**, **Logo**, or **Picture**. You can set the properties like alignment, position, content, color, and font for each of these controls. To complete the design template, configure all the control properties.

You can assign predefined templates to badges. This makes it easy for you to get started with the badge configuration. However, LobbyWorks also enables you to create templates. To do so:

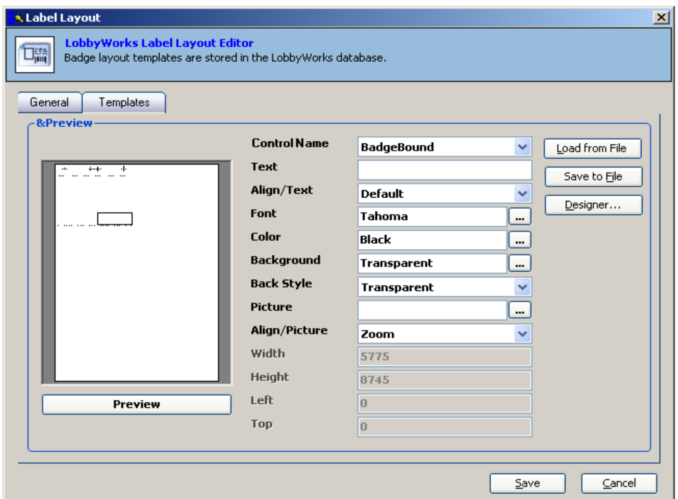
- Copy an existing template and modify it
- Import a template in .xml format and modify it

Adding a template

1. Expand **Profiles** and **Company** and select **Layout Templates** in the navigation area. Right-click anywhere in the display area and select **Add**. The **Label Layout** dialog box appears.



2. In the **Label Layout** dialog box, click the **General** tab.
3. Select the **Company** for which you want to create the template.
4. Type a **Name** for the template. This is a mandatory field.
5. Type a **Description** for the template.
6. Click the **Templates** tab.



7. Click **Preview** to view the selected control and refresh the template label/badge layout after changing the properties.
8. Select the control you want to configure in **Control Name**. When you select a control, the corresponding area is highlighted in the preview pane.
9. Set the properties for the selected control in the fields that follow. The following table describes the entries to be made in the fields.

Table 16-1 Setting the control properties

Control Property	Action
Text	Type the text for the selected control. This value is displayed in the highlighted area, in the badge preview.
Align/Text	Select the horizontal and vertical alignment of the text.
Font	Click ... to open the **Font** dialog box. Set the font, style, size, and script for the text.
Color	Click ... to open the **Color** dialog box. Set the color for the text.
Background	Click ... to open the **Color** dialog box. Set the background color.
Back style	Select the style for the background from the drop-down box. You can set the style for the background as transparent or opaque.
Picture	Insert a picture, if you want to place a graphic in the selected control.
Align Picture	Select the position for the picture from the drop-down box.
Width	Set the width of the control in pixels.
Height	Set the height of the control in pixels.
Left	Set the left alignment of the control in pixels.
Top	Set the top alignment of the control in pixels.

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10. To launch the designer tool for setting other control properties like border color, border style and so on, click **Designer...**.

11. Click **Save** to save the design settings for the template.

Tip: It is recommended that you copy and edit the existing template to create a new layout template as it simplifies the design process.

For modifying the template, refer to "Editing a template" on page 7, in this chapter.

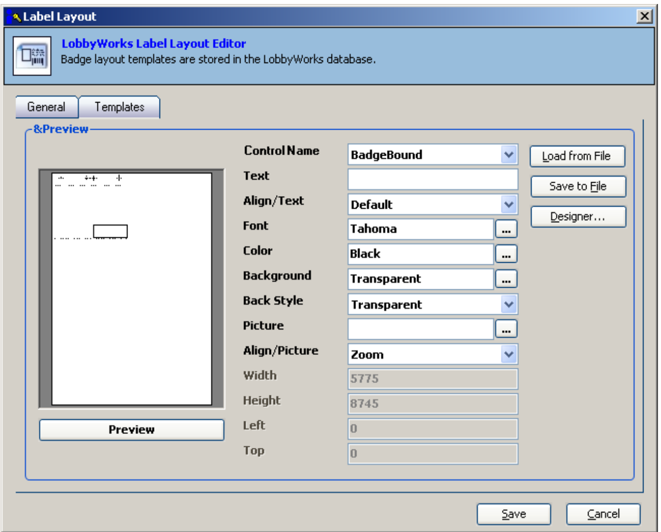
Importing a template

If a designed template exists, LobbyWorks enables you to import it. After importing the design, you can also modify it using the designer tool available in LobbyWorks.

To import a template:

1. Expand **Profiles** and **Company** and select **Layout Templates** in the navigation area. In the display area, right-click any predefined template and select **Add**. The **Label Layout** dialog box appears.

2. In the **Label Layout** dialog box, click the **Templates** tab.



3. Click **Load from File** to import a template in the .xml format. The **Please, select label template file** dialog box appears.

4. Type or select the **File name** for the template file you want to import.

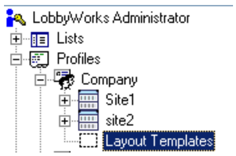
5. Click **Open** to import the template file to LobbyWorks.

Copying a template

You can create a copy of an existing template and modify it to suit your requirements. This enables you to design a new template while retaining the required features of an existing template.

To copy a template:

1. Expand **Profiles** and **Company** and select **Layout Templates** in the navigation area. A list of all the available layout templates appears in the display area.
2. Right-click the template you want to copy and select **Copy**.



3. Right-click in the display area and select **Paste** to create a copy of the template.

For modifying this template, refer to “Editing a template“ on page 7, in this chapter.

Saving a template

You can save the templates in LobbyWorks in the .xml format.

To save a template:

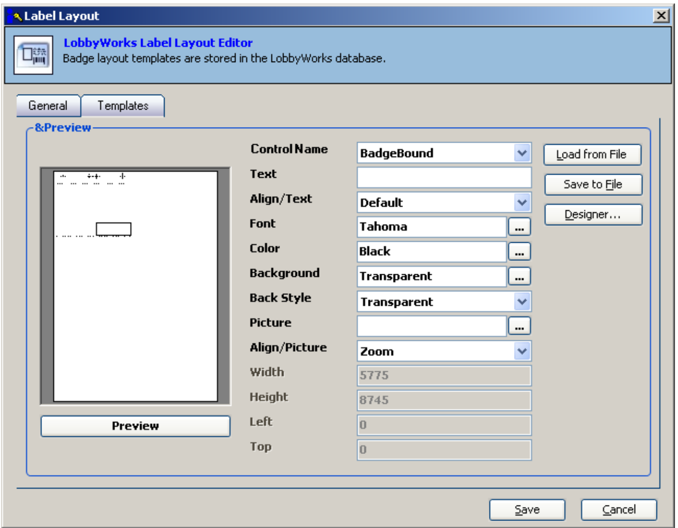
1. Expand **Profiles** and **Company** and select **Layout Templates** in the navigation area. A list of all the available layout templates appears in the display area.
2. Right-click the template you want to save and select **Modify**. The **Label Layout** dialog box appears.
3. In the **Label Layout** dialog box, click the **Templates** tab.
4. Click **Save to File** to save the template in the .xml format. The **Please, select filename to save label template into** dialog box appears.
5. Type or select the **File name** for the file in which you want to save the template.
6. Click **Save** to save the template in the selected file.

Editing a template

LobbyWorks enables you to modify an existing template or an imported template.

To edit a template:

1. Expand **Profiles** and **Company** and select **Layout Templates** in the navigation area. A list of all the available layout templates appears in the display area.
2. Right-click the template you want to edit and select **Modify**. The **Label Layout** dialog box appears.
3. In the **Label Layout** dialog box, click the **General** tab.
4. Change the **Name** and **Description**, if required.
5. Click the **Templates** tab.



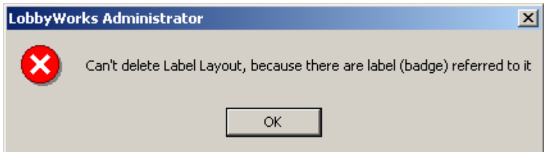
6. Select the **Control Name** for which you want to change the control properties.
7. Set the properties for the selected control in the fields that follow.

   For setting the control properties, refer to "Adding a template" on page 2 in this chapter.
8. To launch the designer tool for changing other control properties, click **Designer...**.
9. Click **Save** to save the design settings for the template.

Deleting a template

1. Expand **Profiles** and **Company** and select **Layout Templates** in the navigation area. A list of all the available layout templates appears in the display area.
2. Right-click the template you want to delete and select **Delete**. A confirmation message appears.
3. Click **Yes** to delete the template.

Note: If the template is assigned to a badge, the following error message appears:



To delete this template, assign a different template to the badge.

For assigning templates to badges, refer to “Adding a badge“ on page 9 in this chapter.

Configure badges

A badge is a physical card used for identifying assets, deliveries, visitors, and employees in LobbyWorks. The badge appearance depends on the layout template assigned to it. The controls in the template can be:

- Static - where the values you enter for the control are not altered.
- Bound - where the data fields you map the control to, can have different values based on the LobbyWorks database.

The layout templates can be customized to create unique badges for:

- a company
- a site
- a category

When a site is added, badges are created by default. Using a badge, you can track the following categories:

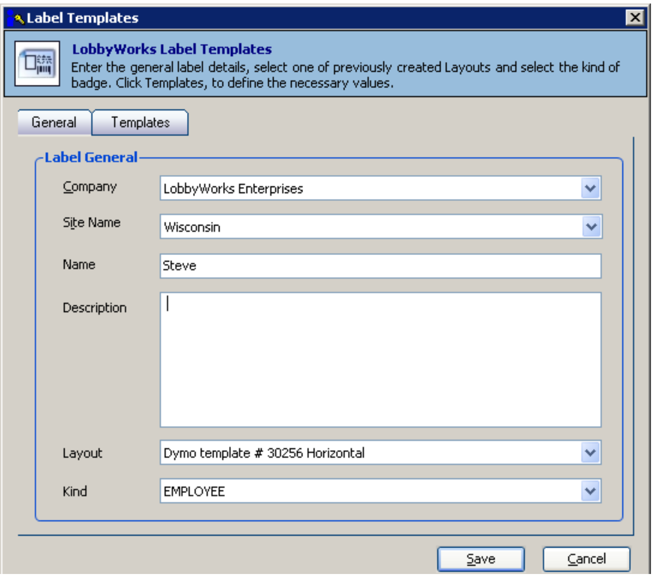
- Employee
- Asset
- Delivery
- Visit

Note: LobbyWorks Front Desk loads the badge templates on startup. Therefore, after making changes to the badge templates, restart the application for the new settings to take effect.

Adding a badge

To assign a template to a badge:

1. Expand **Profiles, Company**, and **Site**. Right-click **Badges** in the navigation area and select **Add**. The **Label Templates** dialog box appears.



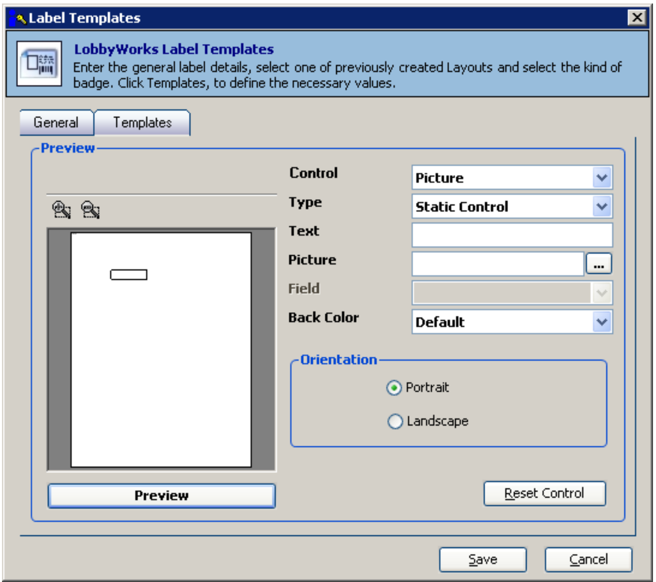
2. In the **Label Templates** dialog box, click the **General** tab.
3. Select the **Company** to which you want to assign the badge.
4. Type a **Name** for the badge.
5. Type a **Description** for the badge.
6. Select the template you want to assign the badge to, from the **Layout** drop-down box.
7. Select the category for which you are creating the badge from the **Kind** drop-down box.
8. Click **Save** to add the badge to LobbyWorks.

You can also customize the template assigned to the badge.

Customizing the template for the badge

To customize the badge template:

1. Expand **Profiles, Company**, and **Site**. Select **Badges** in the navigation area. A list of all the available badges appears in the display area.
2. Right-click the badge you want to customize and select **Modify.** The **Label Templates** dialog box appears.



3. In the **Label Templates** dialog box, click the **Templates** tab.
4. Click **Preview** to view the selected control and refresh the template label/badge layout after changing it's properties.
5. Select the **Control** you want to define.
6. Select the **Type** for the control.
   - Select **Bound Field** to map the control to a value from the database.
   - Select **Static Control** to enter the data for the control.

Note: The **Text** and **Picture** fields that follow, are enabled only when you select **Static Control** as the type.

7. Type the **Text** you want displayed in the selected control.
8. To insert a **Picture** in the template:

- Click [...] provided next to **Picture**. The **Please, select image file** dialog box appears.
- Select the image and click **Open** to insert it.

9. Select the database **Field** you want to map the control to. This field is enabled only when you select the control type as **Bound Field**.
10. Select the background color for the badge from the **Back Color** drop-down box.
    - Default: The background color set for the template is used for the badge.
    - By Category: The color set for the category is used for the badge.
11. Under **Orientation**, select the badge orientation.
    - **Portrait** for a vertical badge.
    - **Landscape** for a horizontal badge.
12. Click **Reset Control** to revert to the default settings for the selected control.
13. Click **Save** to save the settings for the badge.

Editing a badge

LobbyWorks enables you to modify the badge settings.

To edit a badge:

1. Expand **Profiles, Company**, and **Site**. Select **Badges** in the navigation area. A list of all the available badges appears in the display area.
2. Right-click the badge you want to edit and select **Modify**. The **Label Templates** dialog box appears.
3. Click the **General** tab in the dialog box.
4. Make the required changes in assigning the template.
5. Click the **Template** tab in the dialog box.
6. Make the required changes to the badge.
7. Click **Save** to save the modifications to the template assignment and badge template.

Copying a badge

You can create a copy of an existing badge and modify it to suit your requirements. This enables you to design a new template, while retaining the required features of an existing template.

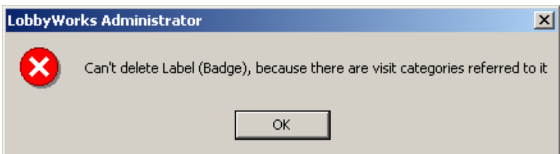
To copy a badge:

1. Expand **Profiles, Company**, and **Site**. Select **Badges** in the navigation area. A list of all the available badges appears in the display area.
2. Right-click the badge you want to copy and select **Copy**.
3. Right-click on the display area and select **Paste** to create a copy of the badge.

Deleting a badge

1. Expand **Profiles, Company**, and **Site**. Select **Badges** in the navigation area. A list of all the available badges appears in the display area.
2. Right-click the badge you want to delete and select **Delete**.A confirmation message appears.
3. Click **Yes** to delete the template.

Note: If the template is assigned to a category, the following error message appears:



To delete this badge, assign a different badge to the category.

Badge codes

Information about visitors, assets, deliveries, and employees can be encoded in a badge code. Badge codes are barcodes that are printed on badges. In addition to the numerical representation supported for all the barcodes, it supports symbolic representation for visitor and employee barcodes. You can set the barcode length for all the categories, and select the representation type for barcode generation. The generated barcode is printed on a badge by a barcode printer.

A barcode reader can be used to retrieve the encoded information from the badge. In the absence of an access control system, this reader can be used at entrances to track visitor movement.

The use of barcodes automates data capture. This in turn improves the speed and accuracy of computer data entry and retrieval.

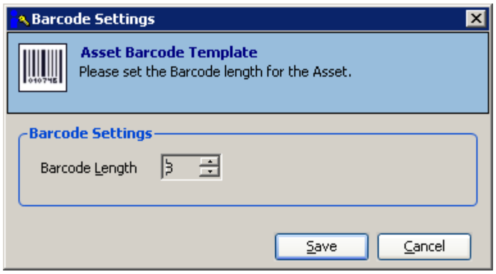
There are four predefined badge codes, one for each category. LobbyWorks does not allow you to add badge codes for the sub-categories. However, you can change the length of the existing codes.

Asset barcode

The asset barcode appears on badges provided for assets.

To modify the asset barcode:

1. Expand **Advanced Configuration** and **Definitions,** and select **Badge Codes** in the navigation area. A list of all the available badge codes appears in the display area.
2. Right-click **Asset Barcode** and select **Modify**. The **Barcode Settings** dialog box appears.



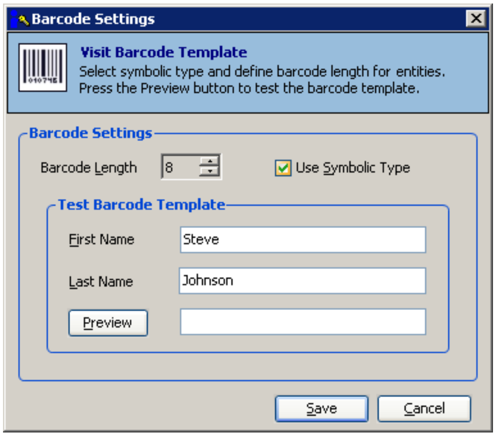
3. Set the **Barcode Length** in the spin box.
4. Click **Save** to save the barcode settings.

Visitor barcode

The visitor barcode appears on badges provided for visitors.

To modify the visitor barcode:

1. Expand **Advanced Configuration** and **Definitions,** and select **Badge Codes** in the navigation area. A list of all the available badge codes appears in the display area.
2. Right-click **Visitor Barcode** and select **Modify**. The **Barcode Settings** dialog box appears.



3. Set the **Barcode Length** in the spin box.
4. Select the **Use Symbolic Type** check box to enable a symbolic representation for the barcode.
5. Type the **First Name** and **Last Name**.
6. Click **Preview** to view a sample of the barcode sequence that might be generated.
7. Click **Save** to save the visitor barcode settings.

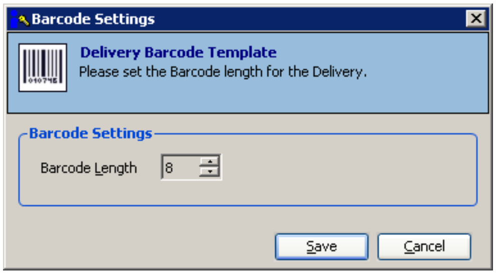
Delivery barcode

The delivery barcode appears on badges provided for deliveries.

To modify the delivery barcode:

1. Expand **Advanced Configuration** and **Definitions,** and select **Badge Codes** in the navigation area. A list of all the available badge codes appears in the display area.

2. Right-click **Delivery Barcode** and select **Modify**. The **Barcode Settings** dialog box appears.



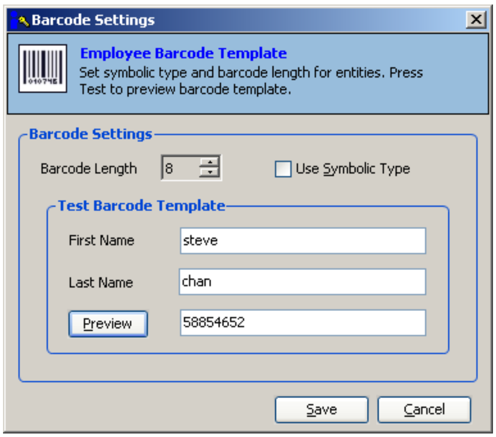
3. Set the **Barcode Length** in the spin box.
4. Click **Save** to save the barcode settings.

Employee barcode

The employee barcode appears on badges provided for employees.

To modify the visitor barcode:

1. Expand **Advanced Configuration** and **Definitions,** and select **Badge Codes** in the navigation area. A list of all the available badge codes appears in the display area.
2. Right-click **Employee Barcode** and select **Modify**. The **Barcode Settings** dialog box appears.
3. Set the **Barcode Length** in the spin box.



4. Select the **Use Symbolic Type** check box to enable a symbolic representation for the barcode.

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5. Type the **First Name** and the **Last Name**.
6. Click **Preview** to view a sample of the barcode sequence that might be generated.
7. Click **Save** to save the employee barcode settings.

Badge Preprint

17

In this chapter...

Overview

The LobbyWorks Badge Preprint application prints the badges for the visitors before they arrive at the premises.

You can use this application to preprint badge for the following visitor categories:

- Customers who visit the company.
- Trainers and attendees of a scheduled training program.
- Attendees for a conference and seminars.

Features of Badge Preprint

- Set the time for pre-printing before arrival of visitor.
- Displays the details of the previous pre-print activities.
- Configures different printers for visitor category.

This chapter describes you how to log on to the Badge Preprint application, preprint settings such as preprint time, category, database, and visit location.

Logging On to Badge Preprint

Before logging on to the Badge Preprint application, ensure that your computer is running under any site.

- Choose **Start > Programs > LobbyWorks > Badge Preprint** or double-click the Badge Preprint icon on the desktop.

After logging on, the LobbyWorks Badge Preprint application runs in background and the icon is visible in the system tray.

Quitting Badge Preprint

To quit the Badge Preprint application, right-click icon in the system tray, and then click **Exit**.

System tray menu

After logging on, the LobbyWorks Badge Preprint application runs in background and the icon is visible in the system tray.

Right-click the icon to view the configuration options.

The following table describes the configuration options.

Click	**To..**
Settings	Configure the preprint time, printer category, database, and visit location settings.
Activity	View the preprint activity.
About	View the version information.
Exit	Exit the application.

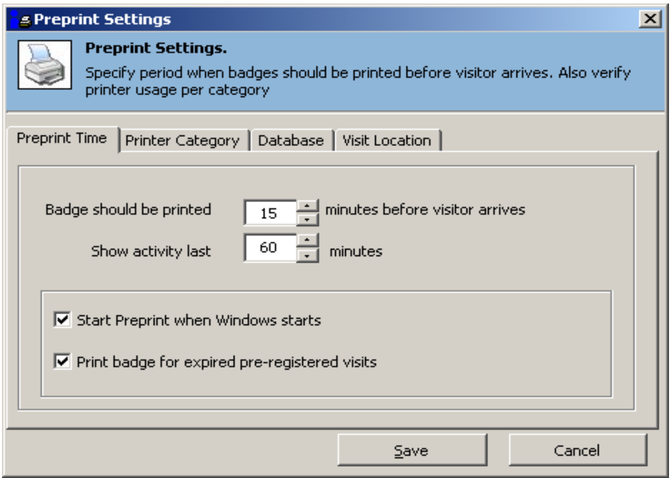
Badge Preprint Settings

Configure the following settings for the Badge Preprint application:

Preprint Time

To specify the preprint time

1. Right-click the  icon in the system tray, and click **Settings**. The **Preprint Settings** dialog box appears.



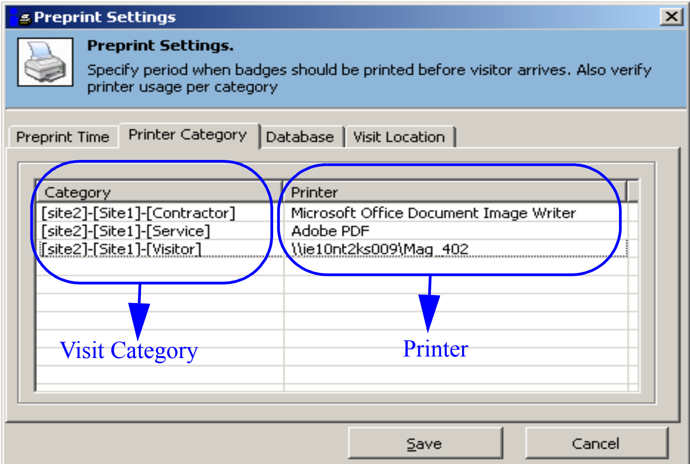
2. Click the **Preprint Time** tab.
3. Set the time for printing badges before visitors' arrival. To do this, select the time in minutes from **Badge Should be printed** spin box.
4. Set the time to show the activities performed by the application. To do this, select time in minutes from **Show activity last** spin box.
5. Select the **Start Preprint when Windows starts** check box, if the application must start automatically when Windows starts.
6. Select **Print badge for expired pre-registered visits**, if you want to print badges for expired pre-registered visitors.
7. Click **Save**.

Printer Category

The printer category enables you to customize the application by configuring the usage of the printer for different category of visitors.

To specify the printer category

1. Right-click the  icon in the system tray, and click **Settings**. The **Preprint Settings** dialog box appears.
2. Click the **Printer Category** tab.



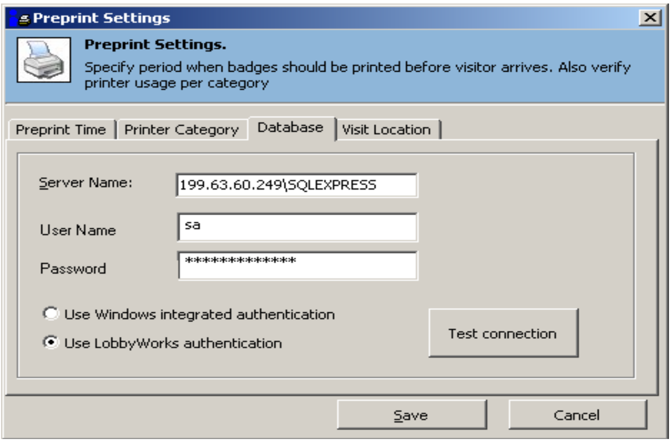
3. Right-click on any one of the category to select the printer.
4. Click **Save** to save the settings.

Database Settings

The details of the visitors for whom the badges must be preprinted are sent from the LobbyWorks database to the badge preprint application. In the database tab you can specify the database information such as server name and logon details.

To specify the database information:

1. Right-click the  icon in the system tray, and click **Settings**. The **Preprint Settings** dialog box appears.
2. Click the **Database** tab.



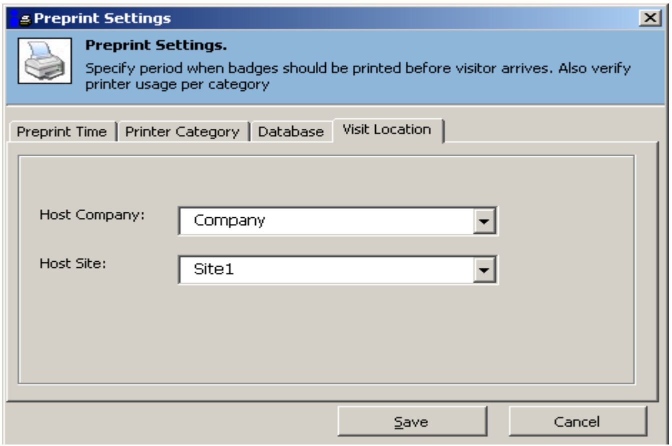
3. Type the LobbyWorks database **Server Name**.
4. Select one of the following to logon to the database.
   - Select **Use Windows integrated authentication**, if the credentials for logging on to Windows must be used for logging on to the database.
   - Select **Use LobbyWorks authentication,** if the SQL Server user name and password must be used for accessing the LobbyWorks database.
5. Click **Test Connection** to verify the connection with the database.
6. Click **Save** to save the settings.

Visit Location

Using LobbyWorks Administrator, you can configure the visit location by assigning the workstation to the particular location.

To specify the visit location information

1. Right-click the  icon in the system tray, and click **Settings**. The **Preprint Settings** dialog box appears.
2. Click the **Visit Location** tab.



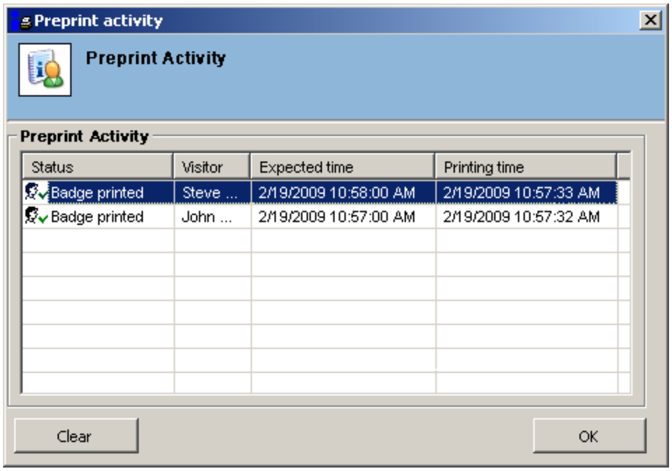
3. In **Host Company**, select the name of the company for which application to print the badges for the visitor.
4. After selecting the host company, In **Host Site,** select name of the host for which application prints the badges for the visitors.
5. Click **Save** to save the settings.

Preprint activity

The Preprint activity enables you to check the activities performed by the application such as badge status, name of the visitor, expected time, and printing time of the badge.

To perform the activity:

1. Right-click the  icon in the system tray, and click **Activity**. The **Preprint Activity** dialog box appears.



Note: Click **Clear** to clear the previous entries.

2. Click **OK**.

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Reporter

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In this chapter...

Overview

The LobbyWorks Reporter application is used for report management. You can generate report for the various entities who visit the premises such as visitors, contractors and so on.You can also generate reports on delivery, assets, and so on which is taken in and out of the premises.

This chapter describes how to log on to the LobbyWorks Reporter application, and how to use its various elements.

In addition, you can print, and save the reports different formats. The formats available are HyperText(*.html), Rich Text(*.rtf). Adobe PDF(*.pdf) and comma-separated(*.csv).

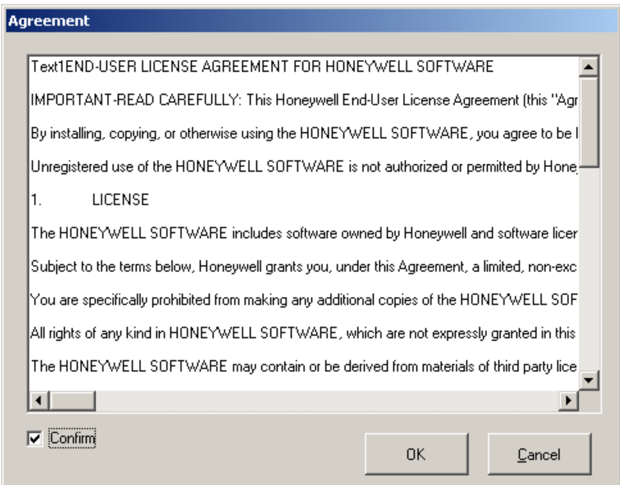
Logging on to Reporter

To log on to Reporter:

1. Choose **Start** > **Programs** > **LobbyWorks** > **Reporter**

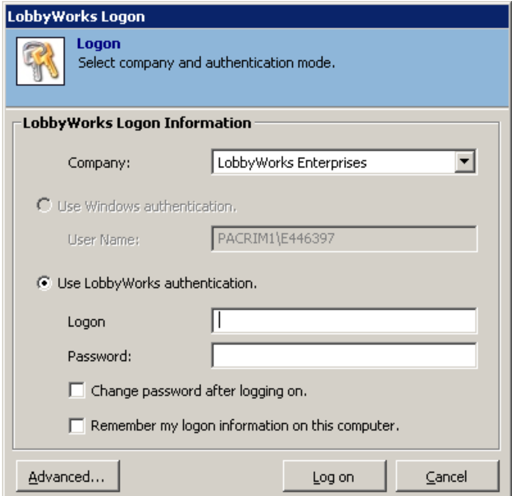
   or

   double-click the Reporter  icon on the desktop**.** The **Agreement** screen appears.

2. Read the agreement and select **Confirm**. This enables the **OK** button.

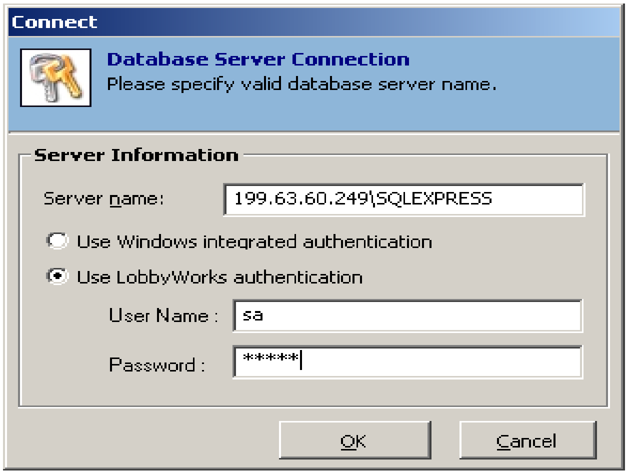
3. Click **OK**. The **LobbyWorks Login** window appears.



4. Type the **Login Name** and **Password**.
5. Select the **Change Password after Login** checkbox, if you want to change the password immediately after logging in.
6. Select **Remember my logon information on this computer** checkbox to save the login information and next time you can login automatically.

Note: To cancel **Remember my logon information on this computer**, press Shift key on your keyboard when you start the application. You can see the login screen.

7. If you want to change the database server from where the information is accessed, click **Advanced.** The **Connect** dialog box appears.



   a. Type the name of the database in **Server name**.
   b. Select one of the following options to log on to the database server:
      * Select **Use Windows integrated authentication:** If the credentials for logging on to Windows must be used for logging on to the database.
      * Select **Use LobbyWorks authentication**: If the SQL Server user name and password must be used for accessing the LobbyWorks database.
   c. Click **OK** to change the settings and close the dialog box.

8. Click **Log on** in the **Lobbyworks Login** dialog box. The LobbyWorks **Reporter** window appears.

User interface

The user interface is divided into entity manager, toolbar, display area, and status bar.

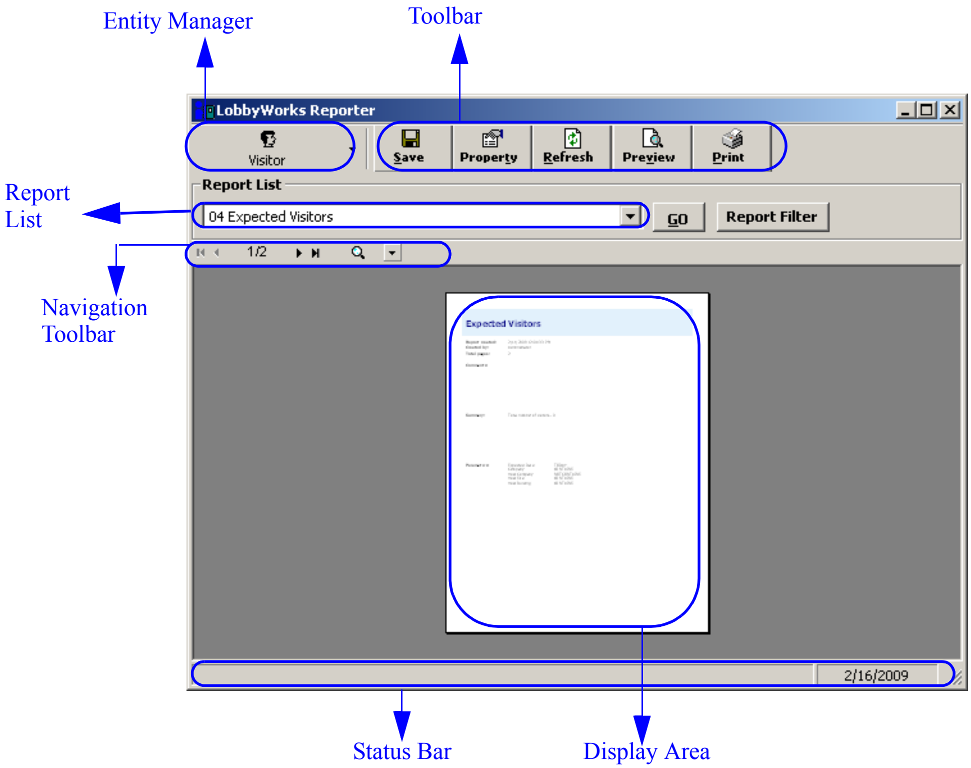
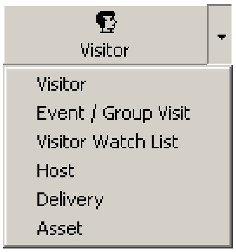


Figure 18-1 Reporter User Interface.

- **Entity Manager** – Lists the various entities in LobbyWorks



- **Display area** – Displays the report

Toolbar

The toolbar helps you perform operations like save, refresh, print the report, and so on.

The following table describes the tool buttons:

Tools	Description
	Enables you to save the report
	Enables you to view the property of the report.
	Enables you to refresh the report.
	Enables you to preview the report before printing it.
	Enables you to print the report.

Navigation tool bar

The following table describes the navigation tool buttons:

Tools	Description
	Enables you to navigate to the first page of the report.
	Enables you to navigate to the previous page of the report.
	Enables you to navigate to the next page of the report.
	Enables you to navigate to the last page of the report.

	Enables you to zoom the size of the report.

Generating reports

You can generate the reports for different entities in LobbyWorks. Reports can be generated before or after the arrival of visitors or receipt of deliveries.

LobbyWorks Reporter enables you to generate built-in reports.

Built-in reports

Built-in reports are available along with the application. Some of the built-in reports are report for visit summary, visit details, and so on. If you require any specific report that is not available as a part of the built-in reports, you can do so by generating a customized report. For example, if you generate a report on visitor summary see "Built-in Report." on page 13.

1. Visitor

The following table lists the name of the built-in report that can be generated for visitors and a brief description on the information provided by each report.

Report Name	Description
Visit Summary	Lists the signed in and signed out visitors.
Visit Details	Displays visit details on a separate page with picture, signature, biz card, photo ID image, history log, and custom fields.
Parking lot Report	Shows cars currently in parking lot.
Expected Visitor	Displays the pre-registered visitor information.
Visitors for Host	Displays the list of visit records for a specific employee.
Busiest Hosts	Contains the list of employees and their visitors.
Visitor per Department Count	Represents the number of visitors to a department in the form of a pie chart.

Report Name	Description
Repeat Visitors	Provides information on the number of visitors who have visited the company more than once.
Average intra day visitor traffic	Represents the average hourly count of visits. Displays the result on a graph of the average daily count vs hour of the day. Also displays number of visits that expected, signed in and signed out.
Intra day visitor traffic	Represents the hourly count of visits. Displays the number of visits that expected, signed in and signed out.
Day of Month Average Visitor Traffic	Displays the average daily count by days of month and displays a graph showing average daily count vs day of month.
Day of Week Average Visitor Traffic	Displays the average daily count by days of week and displays a graph showing average daily count vs day of week.
Average Weekly Visitors Traffic	Displays the visitor information who sign in per week. Displays the graph average count vs number of visitors per week.
Average Monthly Visitors Traffic	Displays the visitor information who sign in per month. Displays the graph average count vs number of visitors per month.
Expected vs Walk-In Visits	Displays the graph number of visits expected vs number of visits which are not pre-registered.
Non-signed out visitors	Displays the list of visitors who have not signed out.
Non-signed out visitors per host.	Lists the details of visitors who have not signed out along with the host information
Average Unsigned Out Visitor trend	Displays the average number of visitors who have not signed out over a period of time in a trend chart.

Report Name	Description
Unsigned Out Visitor trend	Displays the number visitors who are not signed out on a particular date.
Hourly Visit Traffic	Graph showing visitors signed in per hour.
Daily Visit Traffic	Graph showing visitors signed in per day.
Weekly Visit Traffic	Graph showing visitors signed in per week.
Monthly Visit Traffic	Graph showing visitors signed in per month.
Declined Visitor	Shows declined visitors
Access Card Visitor Report	Details of visitors who are given access cards.
Unreturned Access cards	Details of the visitors who are not returned the access card.
Visitor’s onsite time	Displays the visitor’s duration time.

2. Group Visit

The following table lists the name of the built-in report that can be generated for group visits and a brief description on the information provided by each report.

Report name	Description
Group Summary	Displays the number of groups visited.
Group Details	Displays the details of the group on a separate page. Including list of visitors, status of the visitor such as visitor arrival time, sign in and signed out time.

3. Watch List

The following table lists the name of the built-in report that can be generated for watch list and a brief description on the information provided by each report.

Report name	Description
Watch List Summary	Displays the list of people present in the watch list.
Watch List Detail	Displays the details of the visitors who are in watch list.
Attempted Entry	Displays the list of visitors who enters the company when they are already in watch list.

4. Host

The following table lists the name of the built-in report that can be generated for host and a brief description on the information provided by each report

Report name	Description
Host Summary	Displays the umber of hosts.
Host Detail	Details of each host on a separate page, also displays picture, signature, history, pre-authorized visitors, and declined visitors.
Host Timesheet	Displays the sign-in and sign-out details of the host per week.
Host Visitors	Details of visitors who visited the host.
Host Deliveries	Details of deliveries received or sent by hosts.
Host Assets	Displays the number of signed-out assets per host.
Created Host	List of host created in a particular date.
Host Pre-authorized visits	List of visitors who are pre-authorized by the host.
Host Denied visits	List of visits denied by the host.

5. Assets

The following table lists the name of the built-in report that can be generated for assets and a brief description on the information provided by each reportt.

Report name	Description
Assets Summary	Displays the list of assets.
Assets Details	Displays the details of each asset on a page such as signature and picture.
Assets Trend by Days of Month	Displays the graph showing daily count of signed-out assets.
Unreturned Assets	Displays the details of assets for which the date of return has expired but are still not returned.

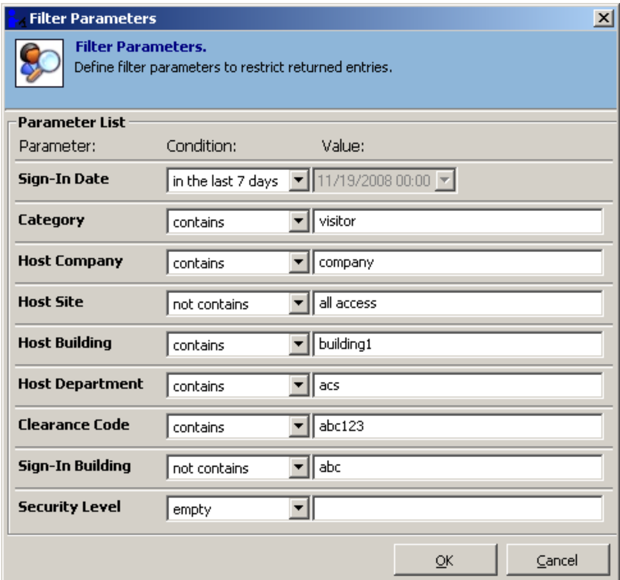
6. Delivery

The following table lists the name of the built-in report that can be generated for delivery and a brief description on the information provided by each report

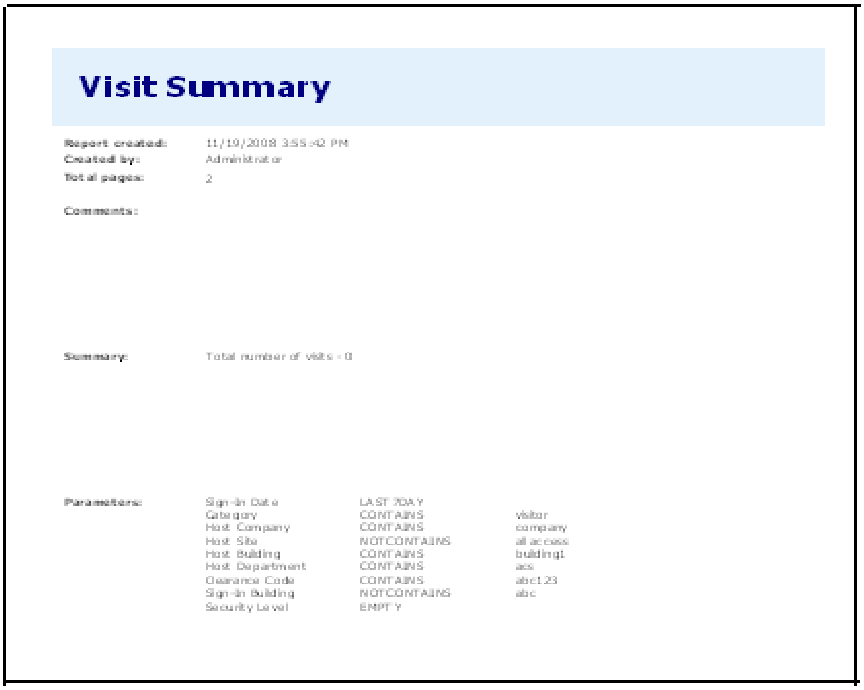
Report name	Description
Delivery Summary	Number of deliveries.
Delivery Details	Delivery details such as signature, and picture on a seperate page.
Delivery Trend	Shows a graph of daily count of deliveries

To generate a built-in report:

1. In **Entity Manager**, select any one of the entity. see Figure 18-1
2. In **Report List**, click ▾ to select the report and click **GO**. The **Filter Parameters** dialog box appears.



3. Under **Parameter List**, select the **Condition** for parameters and type the **Value** for the parameters and then click **OK** to close the dialog box.
4. Click **OK** to generate the report. The following report is generated.



Visit Summary

Report created: 11/19/2008 3:55:42 PM
Created by: Administrator
Total pages: 2

Comments:

Summary: Total number of visits - 0

Parameters:

Sign-In Date	LAST 7DAY	
Category	CONTAINS	visitor
Host Company	CONTAINS	company
Host Site	NOTCONTAINS	all access
Host Building	CONTAINS	building1
Host Department	CONTAINS	acs
Clearance Code	CONTAINS	abc123
Sign-In Building	NOTCONTAINS	abc
Security Level	EMPTY	

Figure 18-2 Built-in Report.

Filtering reports

You can filter the reports using the application. For example, if you need a report on visitor summary see figure "Filtering the report."

To filter the report:

1. Repeat the step 1 through step 3 from Built-in reports, page 7.
2. Click **Report Filter**, the **Report Filter** dialog box appears.

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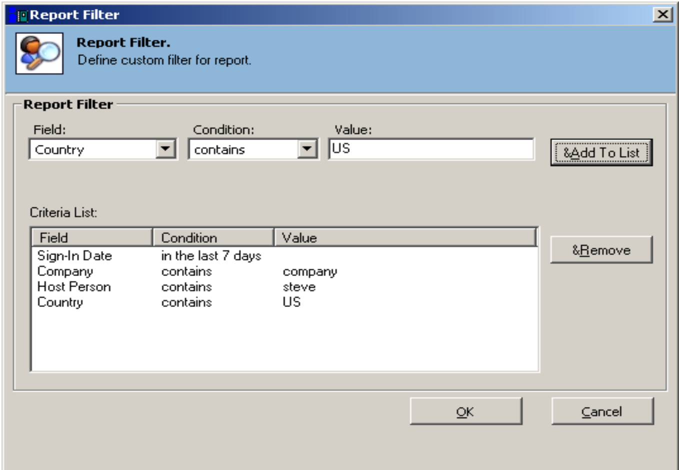


3. Under **Report filter**, select **Field, Condition**, and **Value** and click **Add to List**. The field is selected and added under **Criteria List**. Click **Remove**, if you want to remove the field.
4. Click **OK** to generate the customized report.The following report is generated.

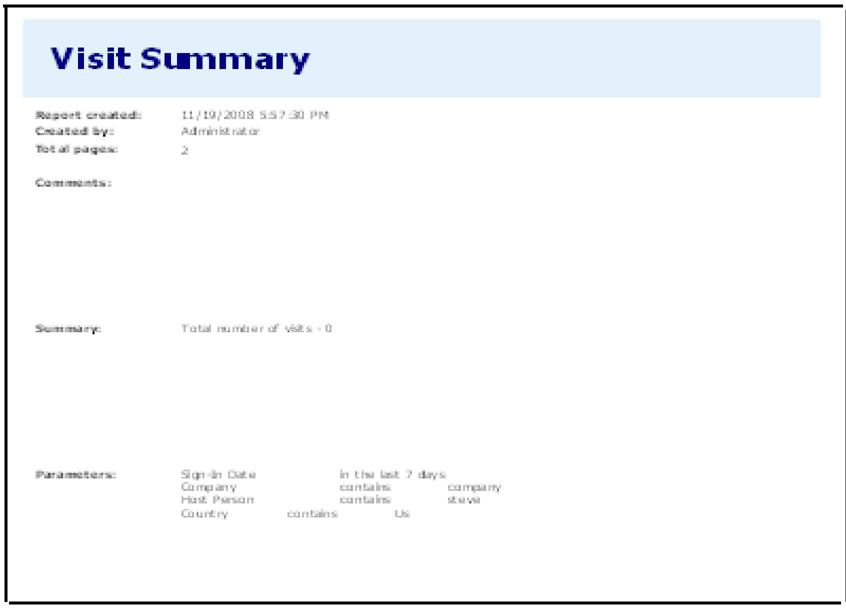


Figure 18-3 Filtering the report.

Backup and Restore

19

In this chapter...

Overview

This chapter describes how to backup and restore the LobbyWorks database. The LobbyWorks database contains data about companies, employees, and visitors. Hence, it is essential that a backup of the information is taken on a regular basis.

The backup and restoration operation involves:

- Taking a backup of the database at periodic intervals.
- Cleaning up the database of redundant and old information.
- Restoring data when the database is corrupt.

Note: The backup, cleanup, and restore operations are performed on the database server and require exclusive access to the LobbyWorks database. So, Honeywell recommends you to close all LobbyWorks applications that are currently open.

Backup and cleanup

You can take a backup of the database by saving the data on your computer. You can take a backup of the entire database or take a backup of only the incremental changes in the database.

Taking a backup of the incremental changes or changes in the database ensures that multiple copies of the same file is not created and thereby saves disk space.

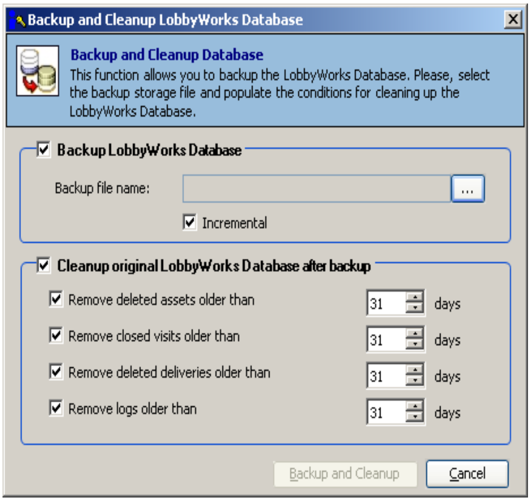
Warning:

- Before taking a backup of the server, ensure that you have installed the Scheduler on the computer in which you have installed the Administrator application.
- Before taking a backup of the server, ensure that you have closed the Front Desk, Kiosk, Notify, Scheduler, Badge Preprint, and Reporter applications.

The cleanup operation involves removing redundant data from the database.

Database Backup and Cleanup

1. Click  in the toolbar. The **Backup and Cleanup LobbyWorks Database** dialog box appears.



2. Select the **Backup LobbyWorks Database** checkbox to enable backing up of the LobbyWorks database.

3. In the **Backup file name**, type the name of the backup file along with the folder path.

   OR

   Click ... . to navigate and select the file from the folder.

4. Select the **Incremental** checkbox, to take a backup of only the changes in the database.

5. Select the **Cleanup original LobbyWorks Database after backup** checkbox to remove outdated information from the database. The following check boxes are enabled. Select the appropriate check box for the clean up operation, specify the condition for cleanup, and select the day in the spinbox. The table below describes the option.

   Table 19-1 Database Cleanup Options

Option	Description
Remove deleted assets older than	Removes the details of assets deleted prior to the specified number of days.
Remove closed visits older than	Removes the details of visits closed prior to the specified number of days.

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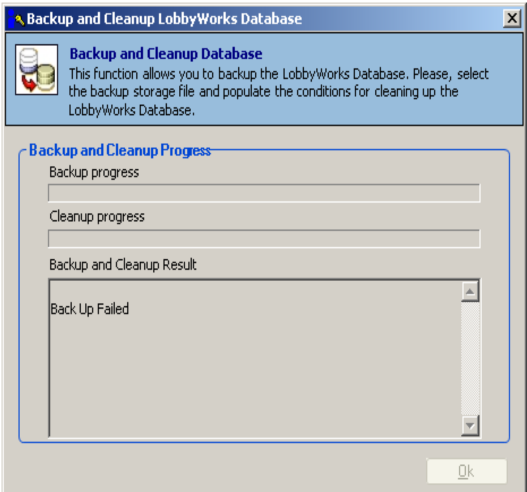
Option	Description
Remove deleted deliveries older than	Removes the details of deliveries deleted prior to the specified number of days.
Remove logs older than	Removes the details of records created prior to the specified number of days.

6. Click **Backup and Cleanup** to initiate the backup and cleanup operation. A dialog box showing the progress of the backup and cleanup operation appears.



7. Click **OK** to close the progress dialog box.

Scheduling Backup and Cleanup

You can schedule the backup and clean up operations for specific time intervals.

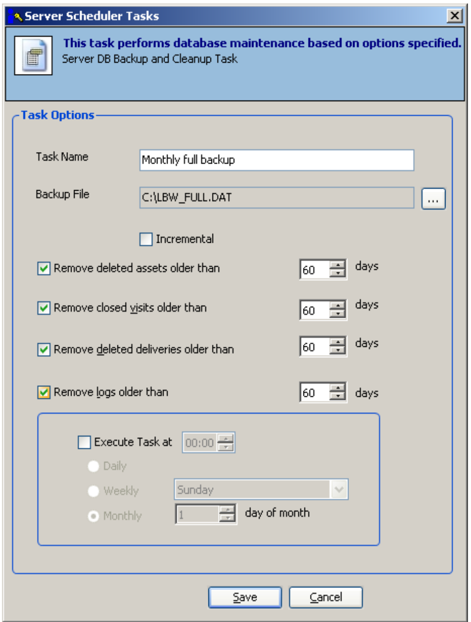
When LobbyWorks is installed, two predefined server task are available.

- **Monthly full backup**: This task makes a complete backup of the database on the first day of every month. The default location for the backup file is **C:\LBW_FULL.DAT**.
- **Weekly incremental backup**: This task makes an incremental backup of the database, Saturday of every week.

You can modify and add the predefined server tasks, create tasks and delete the required tasks.

Adding a Server Task

1. Expand **Advanced Configuration** and **Scheduler** and select **Server Tasks** in the navigation area. Right-click anywhere in the blank space in the display area and select **Add**. The **Server Scheduler Tasks** dialog box appears.



2. Type a name for the task in **Task Name**. This is a mandatory field.
3. In the **Backup file name**, Type the location to save the backup file. This is a mandatory field.

   OR

   Click ... to navigate and select the file from the folder.
4. Select the **Incremental** checkbox, to update only the changes to the existing file in the database.
5. To remove outdated information from the database, select the **Cleanup original LobbyWorks Database after backup** checkbox. Selecting this checkbox, enables the checkboxes that follow.
6. You can specify the conditions for data cleanup by selecting the appropriate checkbox and entering the days in the spinbox. The table below describes the options.

Table 19-2 Database Cleanup Options

Option	Description
Remove deleted assets older than	Removes the details of assets deleted prior to the specified number of days.
Remove closed visits older than	Removes the details of visits closed prior to the specified number of days.
Remove deleted deliveries older than	Removes the details of deliveries deleted prior to the specified number of days.
Remove logs older than	Removes the details of records created prior to the specified number of days.

7. Select the **Execute Task** check box and enter the time in the spinbox provided alongside to execute the backup and cleanup operation at the specific time. The operation is performed at the specific time daily, weekly, or monthly, based on the option you select below:
   - **daily**: The task is executed everyday.
   - **once per day at**: The task is executed once a week, on the specified day.

     Example: To perform the task on Saturday every week, select the option and select Saturday.
   - **monthly**: The task is executed every month, on the specified day.

     Example: If you select 2, the task is performed on the second day of every month.
8. Click **Save** to save the server task settings.

Editing a Server Task

1. Expand **Advanced Configuration** and **Scheduler** and select **Server Tasks** in the navigation area. The list of available server tasks appears in the display area.
2. Right-click the server task you want to edit and select **Modify** to view the **Server Scheduler Tasks** dialog box.
3. Make the required changes.
4. Click **Save** to save the changes and close the dialog box.

Deleting a Server Task

1. Expand **Advanced Configuration** and **Scheduler** and select **Server Tasks** in the navigation area. The list of available server tasks appears in the display area.
2. Right-click the server task you want to delete and select **Delete**. A message asking for confirming the deletion appears.
3. Click **Yes** to delete the selected task.

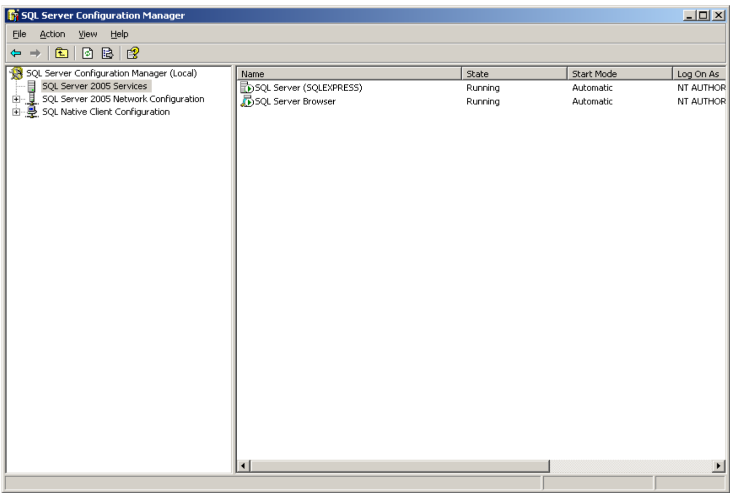
Note: Database Back Up functionality in Lobbyworks 4.0 makes use of SQL Server 2005 service.This service by default runs with the credentials of Network Service and has write permission for the data folder only.

So to back up the Lobbyworks 4.0 database folder other than Data folder the service has to be made to run in an account with those credentials.

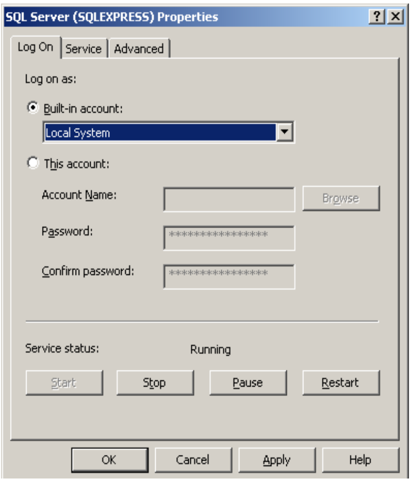
Changing the SQL Server Settings

To change the account of the service:

1. Choose **Start** > **Programs** > **Microsoft Sql Server 2005** > **Configuration Tools** > **Sql Server Configuration Manager**. The following screen appears:



2. In the left pane, select **SQL Server 2005 Services**.
3. In the right pane, select **SQL Server**. The following screen appears:



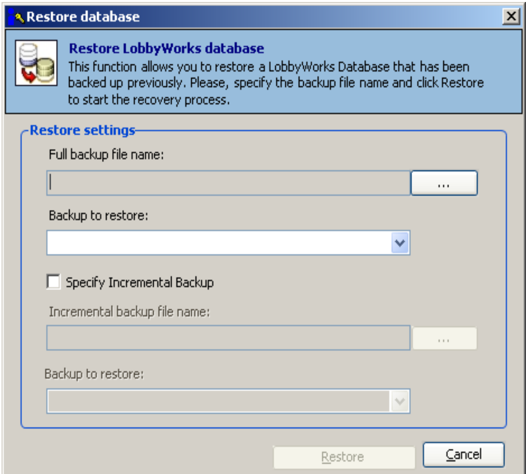
4. Click the **Log On** tab.
5. Select **Built-in Accounts**, and then select **Local System** from the list.
6. Click **Apply**, a confirmation message appears. Click **Yes**.
7. Click **OK** to finish.

Restore

There can be situations, where the current working database encounters problems. In such cases you can restore a backup of the working database. You can restore the database that was last backed up to ensure minimum data loss.

To perform a restore operation:

1. Click in the toolbar. The **Restore Database** dialog box appears.



2. Type the filename and path of the backup file which needs to be restored, in **Full backup file name**.
3. Select the most recent successful backup date in the **Backup to restore** box.
4. Select the **Specify Incremental Backup** checkbox to restore only the incremental changes.
5. Type the filename and path of the incremental backup file which needs to be restored, in **Incremental backup file name**.
6. Select the required date in the **Backup to restore** box.

View the audit log

Logs are recorded in LobbyWorks for any requests, responses, errors, and events happening in Administrator, Front Desk, Kiosk, and Notify. You can export the recorded logs and save them as csv (comma separated files). Using the logs, you can troubleshoot and resolve any errors or issues in any of the application.

To export Audit logs:

1. Click in the toolbar. The **Export Audit Log** dialog box appears.

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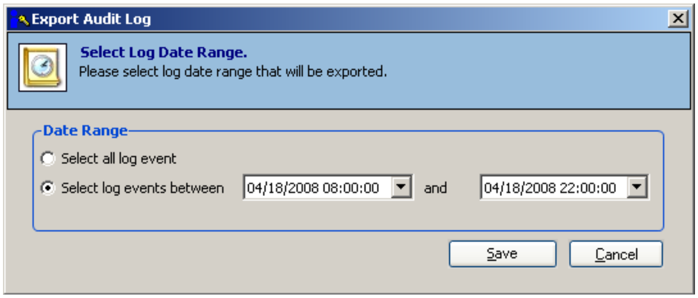


2. In Date Range, select one of the following options:

Option	Description
Select all log event	Logs recorded for all events.
Select log events between	Log events recorded during a specific period.

3. Click **Save** to save the settings. The logs are saved as a .csv file in the folder where LobbyWorks in installed.

External Devices

20

In this chapter...

Overview

External devices operate in conjunction with a central system, but is not part of the system itself. Some of the external devices that are interfaced with the Front Desk/Kiosk applications are:

- Camera: To capture images
- Scanner: To scan cards
- Printer: To print badges
- Barcode reader: To read barcodes

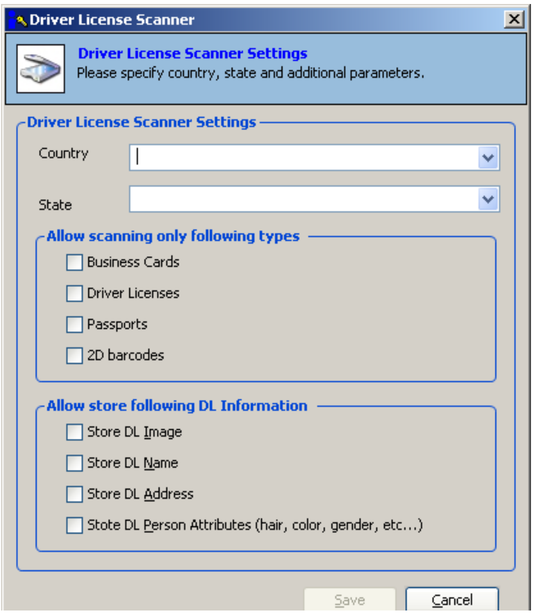
These devices are used to track and record the visitors' entry into the premises.

Driver license scanner settings

The host can scan the visitor's driving license through the driver license scanner.

To scan a driving license:

1. Expand **Advanced Configuration** and select **Devices** in the navigation area. The predefined list of tasks appears in the display area.
2. Right-click **Driver License Scanner** and select **Modify**. The **Driver License Scanner** dialog box appears.



3. Select the country you are located in from the **Country** list.
4. Select the state you are located in from the **State** list.

5. Under **Allow scanning only following types**, select the type of document to be scanned. The supported type of documents are business cards, driver licenses, passports and 2D barcodes.
6. Under **Allow store following DL information**, select to store the type of information. You can store driver license image, name, address and person's attributes.
7. Click **Save**.

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Kiosk Configuration

21

In this chapter...

Overview

Using the LobbyWorks Administrator application, you can configure the following:

- The Kiosk user interface.
- The categories of visitors who can register/sign-in at the kiosk.
- The Kiosk workstation properties.
- The settings for the devices connected to the kiosk.

The settings you configure in the LobbyWorks Administrator determine the options displayed in the Kiosk application.

Design the kiosk user interface

You can define and organize the contents displayed in the Kiosk user interface using the configuration options in the Administrator.

In the Administrator application, you can configure the following settings for the Kiosk.

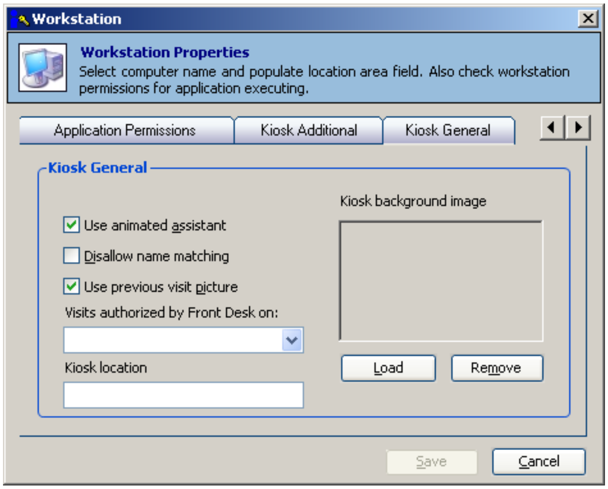
- The background display for the Kiosk user interface.

Setting the background display

Using the LobbyWorks Administrator, you can select an image to be displayed at the background in the Kiosk user interface.

To set the background image:

1. Expand the **Company** and **Site**.
2. Right-click **Workstations** in the navigation area and select **Modify**. The **Workstation** dialog box appears.



3. Click the **Kiosk General** tab.
4. Click **Load** to select and upload the background image.
5. Click **Remove** to undo the selection.
6. Click **Save** to save the general Kiosk settings.

Configure settings for categories

Visits Category: In LobbyWorks, the Visits category helps you track and control visitors' entry to the premises. You can configure settings to determine how the visitors of a category interact with the Kiosk application. In addition, you can assign a template for the visitor's badge to be printed at the kiosk.

Employees Category: The Employees category consists of people working at the premises. You can assign a template for the temporary employee badge, which can be printed at the kiosk.

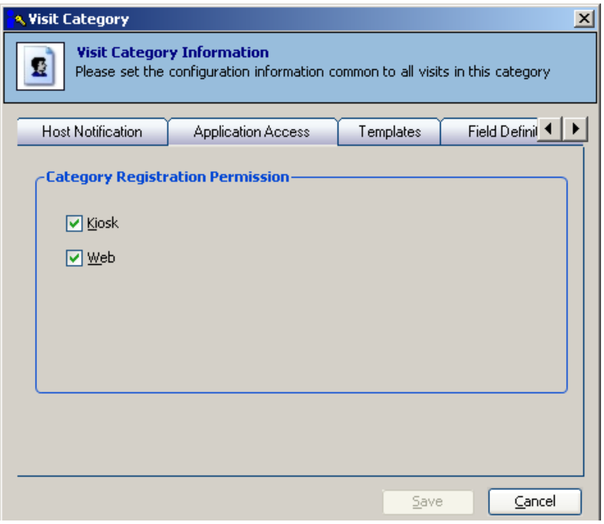
Settings for the visits category

You can make the following settings for the Visits categories.

- Enable visitors of a Visits category to self-register their visit using the kiosk.
- Allow only pre-registered visitors for a Visits category.

To enable visitors to self-register

1. Expand **Categories** and select **Visits** in the navigation area. A list of Visits categories is displayed in the display area.
2. Right-click the Visits category to be modified and select **Modify**. The **Visit Category** dialog box appears.
3. Click the **Application Access** tab.



4. Select the **Kiosk** check box to enable visitors of this Visit category to self-register at the kiosk.

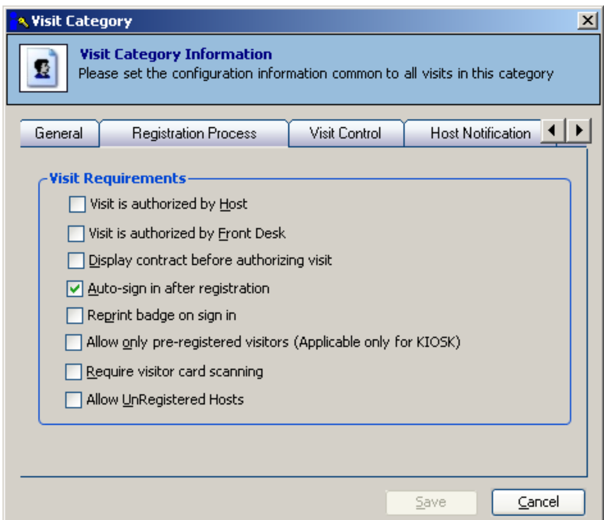
5. Click **Save**.

To allow only pre-registered visitors for a Visit category

1. Expand **Categories** and select **Visits** in the navigation area. A list of Visits categories is displayed in the display area.
2. Right-click the Visits category to be modified and select **Modify**. The **Visit Category** dialog box appears.
3. Click the **Registration Process** tab.
4. Select the **Allow only pre-registered visitors** check box to enable only pre-registered visitors to self-register at the kiosk.

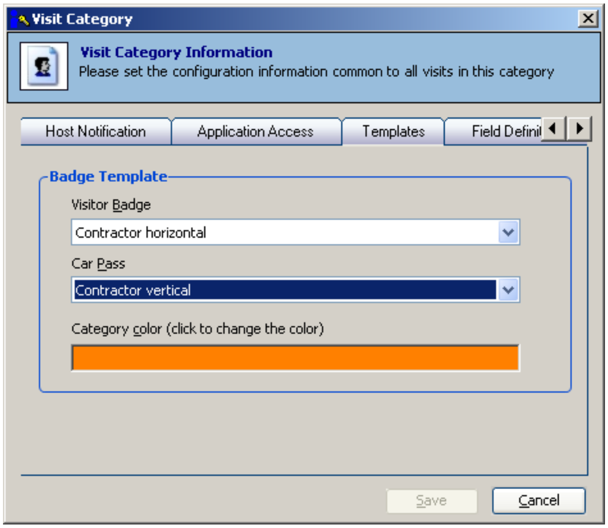
Note: Before you select this option, you must clear the Disallow name matching option in the Set General Kiosk Properties dialog box.

5. Select the **Require visitor card scanning** check box to make card scanning for the visitors of the category.
6. Click **Save** to save the category settings.



To set the badge template for visitors of the category:

1. Expand **Categories** and select **Visits** in the navigation area. A list of Visits categories is displayed in the display area.
2. Right-click the Visits category to be modified and select **Modify**. The **Visit Category** dialog box appears.



3. Click the **Templates** tab.
4. Select the badge template from the **Visitor Badge** list.
5. Select a template for a **Car Pass** from the list.
6. You can select a color for the badge by performing the following steps.
   a. Click anywhere in **Category color** to open the **Color** dialog box.
   b. From the **Basic colors** palette, click the color you want to use for the category.
   c. To define a custom color, click **Define Custom Colors** and specify the color combination in the **Color** dialog box.
   d. Click **OK** to apply the color and exit from the **Color** dialog box.
7. Click **Save** to save the badge settings for the Visits category.

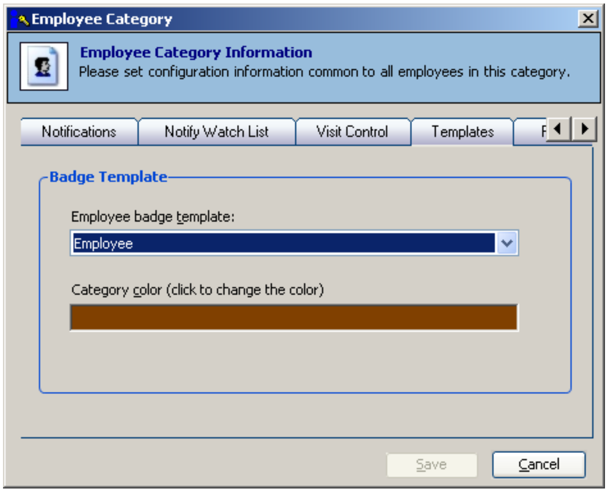
Settings for the employees category

For an Employees category you can set the badge template for the temporary employee badge.

To set the badge template:

1. Expand **Categories** and select **Employees** in the navigation area. A list of Employees categories is displayed in the display area.
2. Right-click the Employees category to be modified and select **Modify**. The **Employee Category** dialog box appears.

3. Click the **Templates** tab.



For more information about selecting a badge, refer to "To set the badge template for visitors of the category:" in this chapter.

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Configure the kiosk workstation properties

Using the Administrator you can configure general and additional properties for the workstation at the kiosk.

Setting application permissions

You can select the applications you want to run on a selected workstation. To run the Kiosk application on a workstation, you must enable the Kiosk option, in the **Application Permissions** tab for the workstation.

To set the application permissions:

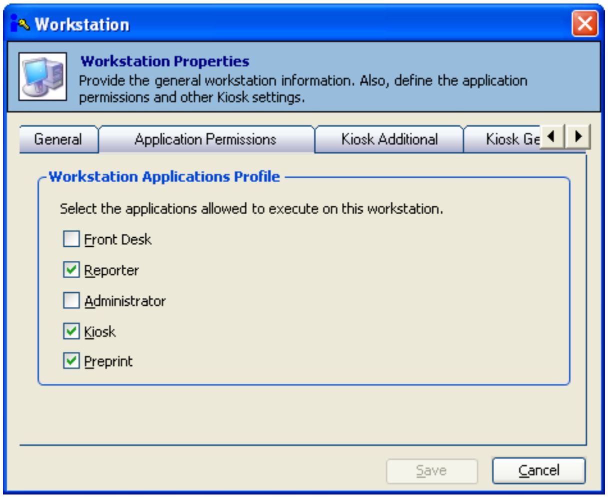
1. Select the workstation on which you want to run the Kiosk, right-click and select **Modify**.

   OR

   a. Click **Available Workstations** in the navigation area.

   b. Select the workstation on which the Kiosk is installed, right-click and select **Modify**.

   The **Workstation** dialog box appears.



2. In the **Workstation** dialog box, click the **Application Permissions** tab.
3. Select the check boxes for the application(s) that can run on the workstation. The options available are **Front Desk**, **Reporter**, **Administrator**, **Kiosk**, and **Preprint**.
4. Click **Save**.

Setting additional kiosk properties

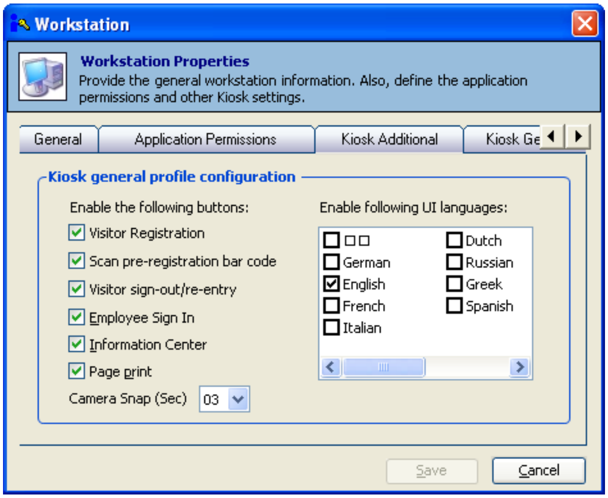
The following settings can be configured/enabled for the Kiosk, in the **Kiosk Additional** tab.

- The supported Kiosk user interface languages.
- The Information Center.
- The visitor sign-in and/or sponsor sign-in features.

  By allowing visitors to sign-in themselves, you can eliminate the time spent by the visitor in waiting for the host to do the sign-in.

To set the additional properties for the kiosk

1. Expand **Workstations** in the navigation area.
2. Right-click the workstation on which the Kiosk application is installed, and select **Modify**. The **Workstation** dialog box appears.
3. Click the **Kiosk Additional** tab.



4. Select the **Visitor Registration** check box to enable the visitors to register themselves. This reduces the wait time for visitors as they need not wait at the Front Desk.
5. Select the **Scan pre-registration bar code** check box to enable the visitor to scan the bar code that was sent through e-mail while pre-registering.
6. Select the **Visitor sign-out/re-entry** check box to enable the visitor to automatically sign-out after finishing the meeting.

7. Select the **Employee Sign In** check box to display the option that enables the sponsor to sign in and authorize the visitor at the Kiosk
8. Select the **Information Center** check box to display the information center option in the Kiosk. The information center can be configured to display your company's information. The links you created are also displayed in the information center.

   For creating links, refer to the Additional Settings chapter.
9. Select the **Page print** check box to enable the Print option in the Kiosk Information Center. The visitor can click the Print option to print the onscreen information if a printer is connected to the Kiosk.

   Note: The **Page print** option is enabled only when you select the **Information Center** check box.
10. Select the **Camera Snap(Sec)** time.
11. The **Enable following UI languages** contains a list of languages. From the list, select the languages for the Kiosk user interface.
12. Click **Save** to save the additional Kiosk settings.

Setting general kiosk properties

The general settings determine the basic features available to the visitor at the Kiosk.

You can enable the following feature:

- Allow name matching to speed up the process of entering information.

To set the general properties for the kiosk:

1. Expand **Workstations** in the navigation area.
2. Right-click the workstation on which the Kiosk application is installed, and select **Modify**. The **Workstation** dialog box appears.

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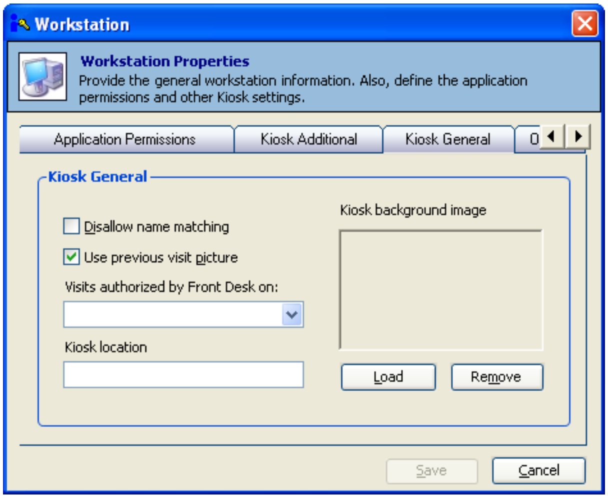


3. Click the **Kiosk General** tab.
4. Select the **Disallow name matching** check box to disable the name matching feature.

Note: Before you select this option, you must clear the Allow only pre-registered visitor option in the Setting general kiosk properties dialog box

5. Select the **Use previous visit picture** check box to use the picture taken during the visitor's previous visit.
6. Select the name of the computer on which the Front Desk is installed, from the the **Visits authorized by Front Desk on** list.
7. Type the **Kiosk location**.
8. Click **Load** to apply the selected the image as the background to set the Kiosk background image. You can undo the selection by clicking **Remove**.
9. Click **Save** to save the general Kiosk settings.

Setting other kiosk properties

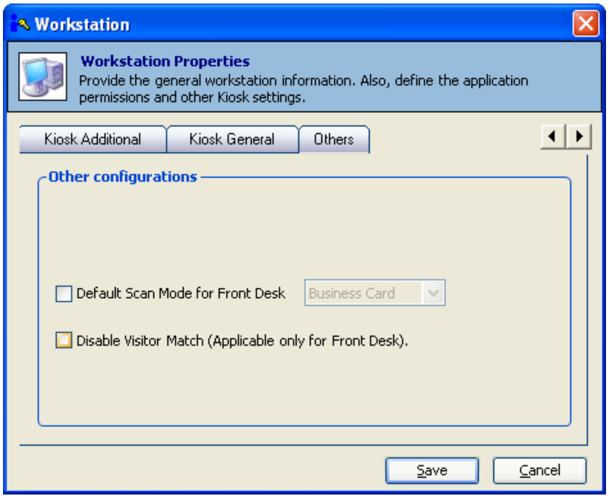
The other settings determine the additional features available to the visitor at the Kiosk.

You can enable the following features:

- Allow default scan mode for a visitor entering the Front Desk.
- Enable/Disable visitor match.

To set the other properties for the kiosk:

1. Expand **Workstations** in the navigation area.
2. Right-click the workstation on which the Kiosk application is installed, and select **Modify**. The **Workstation** dialog box appears.



3. Click the **Others** tab.
4. Select the **Default Scan Mode for Front Desk** check box to enable the front desk personnel to select the following scan mode(s) for visitor authorization.
   – Business Card
   – Driver License
   – Passport
   – Barcode
5. Select the **Disable Visitor (Applicable only for Front Desk)** check box to disable the visitor match feature.
6. Click **Save** to save the other Kiosk settings.

Configure device settings

Note: Configure Device Settings is not supported for this release.

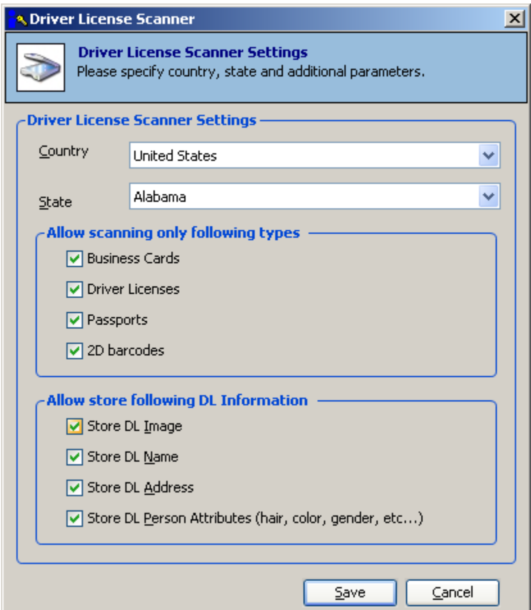
You can connect the following devices to the kiosk workstation and specify settings for them using the LobbyWorks Administrator.

- Camera to take a picture for the badge.
- Driving license scanner and business card scanner to scan visitors' driving licenses and business cards.

Configuring the driving license scanner

Driving license scanners are specific to the region in which they are used. They must be configured for a specific country and state. In addition, you can specify the document types that you want to scan at the Kiosk.

1. Expand **Advanced Configuration** and **Devices** in the navigation area.
2. Right-click **Driving License Scanner** in the display area and select **Modify**. The **Driving License Scanner** dialog box appears.



3. Select the **Country** and **State** of the company at which the scanner is being used.

4. The **Allow scanning only following types** contains a list of personal identification documents that can be scanned by LobbyWorks.

   Select the check boxe(s) for the documents you want to scan.

5. The **Allow store following DL information** contains a list of driving license information.

   Select the check box/es for the driving license information you want to save.

6. Click **Save** to save the settings for the driving license scanner.

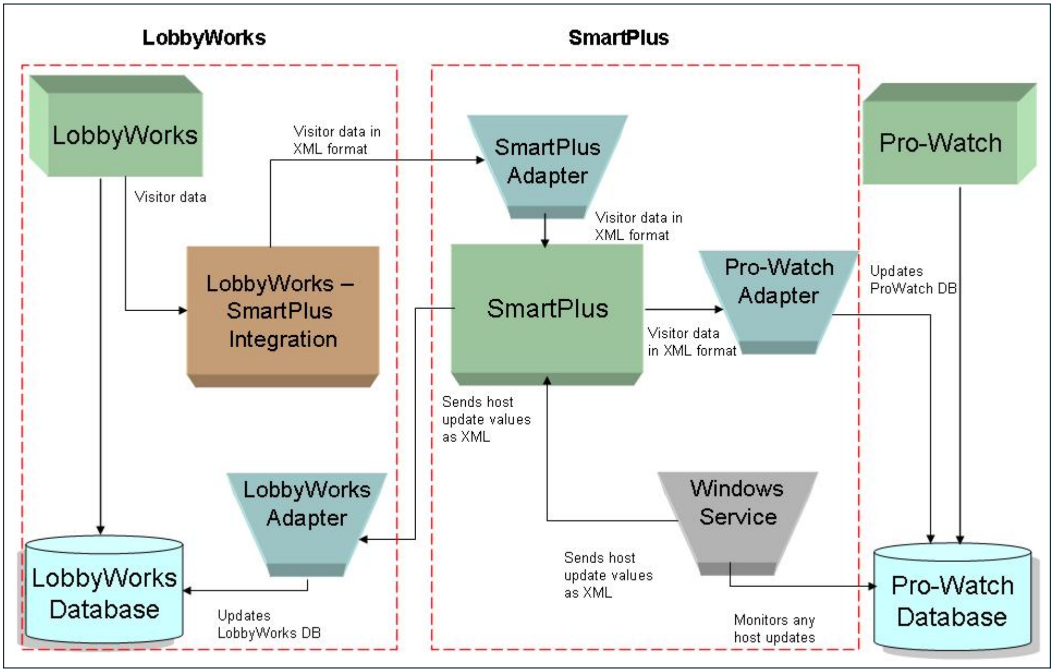
Appendix A - ACS Integration

A

In this chapter...

Overview

The SmartPlus® Commercial Interface application enables you to integrate LobbyWorks with the Pro-Watch® Access Control System. The following diagram shows the interaction between the various blocks in the LobbyWorks, SmartPlus®, and Pro-Watch® applications.



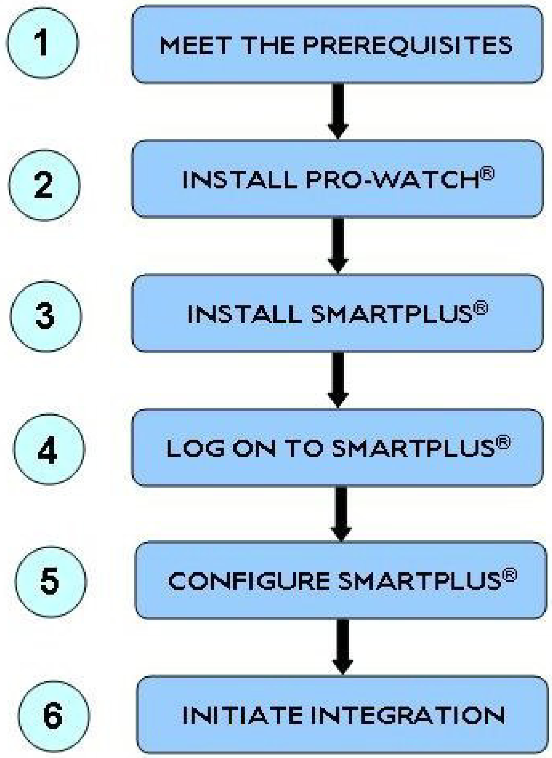
Integrating Pro-Watch® with LobbyWorks enables you to do the following:

- During registration, you can assign clearance codes to visitors in the LobbyWorks Front Desk application.
- You can print access cards for visitors.
- You can print temporary badges for employees.

Note: If the username of the host is modified in Pro-Watch®, it does not gets updated in LobbyWorks.

Flow diagram

The following diagram illustrates the tasks and the order in which they must be performed to successfully integrate LobbyWorks with Pro-Watch®, using the SmartPlus® application.



The steps to be performed to integrate LobbyWorks and Pro-Watch® are as follows.

1. Check the list of prerequisites and ensure all of them are met.
2. Install the Pro-Watch® application on a computer within the network.
3. Install the SmartPlus® application on a computer within the network.
4. Log on to SmartPlus®.
5. Configure the SmartPlus® application.
6. Provide the integration settings and initiate the integration from LobbyWorks.

Step 1: Meeting the prerequisites

Installing the LobbyWorks Adapter

The LobbyWorks Adapter enables the LobbyWorks application to communicate with other applications, such as Pro-Watch®. The LobbyWorks installation setup installs the adapter if it is enabled in the **Custom Setup** screen.

Note: If you forget to install the LobbyWorks Adapter during custom installation, you can run the setup in the same computer, select modify option and select the feature in the custom setup screen. For more information about the adapter installation, refer to the "Installing LobbyWorks applications" section in the Installing LobbyWorks 4.0 chapter.

IIS 5.1 or higher must be present

For more information about the prerequisites to install LobbyWorks 4.0, refer to the "System requirements" section in the Introduction chapter.

Step 2: Installing the Pro-Watch® database and application

Install the Pro-Watch® application and database server. The computers on which the application and database are installed must be in the same domain as the LobbyWorks database, to enable both the applications to communicate with each other.

For information about how to install Pro-Watch®, refer to the Pro-Watch user documentation.

Step 3: Installing the SmartPlus® application

Install the SmartPlus® application on a computer which is in the same domain as the LobbyWorks and Pro-Watch® databases.

For information about how to install SmartPlus®, refer to the SmartPlus® Installation, Configuration, and Troubleshooting Guide.

Step 4: Logging on to SmartPlus®

After the SmartPlus® application is installed, log on to the application to configure the LobbyWorks information. The default username and password when you are logging on for the first time are 'admin' and 'smartplus'. After logging on, you can change the password based on your user privileges.

For more information about how to log on, refer to the SmartPlus® Installation, Configuration, and Troubleshooting Guide.

Step 5: Configuring SmartPlus®

After logging on to SmartPlus®, configure the following settings to enable connectivity among the LobbyWorks, SmartPlus®, and Pro-Watch® applications.

1. Specify the LobbyWorks connection information.

   Enter the LobbyWorks **Subscriber URL** and **Publisher URL** which enables communication between SmartPlus® and LobbyWorks.

2. Specify the Pro-Watch® connection information.

   Enter the Pro-Watch® database, server, and URL information which enables communication between SmartPlus® and Pro-Watch®.

   Select the **LobbyWorks sends Clearance Codes** check box for clearance codes to be passed on from LobbyWorks to Pro-Watch®.

Caution: If this check box is selected, ensure that a clearance code is assigned during visitor registration using the LobbyWorks Front Desk application. If the check box is selected and a clearance code is not assigned in Front Desk, then you might encounter an “Integration Failed” error.

3. Map the attributes in LobbyWorks to those in Pro-Watch® and vice-versa.

   Enter the entity (visitor) and the entity property (visitor data) in LobbyWorks (source) and select the entity (badgeholder) and entity property (badge fields) to which it must be mapped in Pro-Watch® (destination).

Note: By default, the first name and last name are mapped in LobbyWorks to those in Pro-Watch®.

4. Specify provisioning rules for the entity attributes.

   Select the clearance code(s) to be assigned to the entity property value. The default badge type ‘LW_Visitor’ is assigned to each LobbyWorks visitor by default, and cannot be changed.

Note:

•If you have not assigned the clearance code in the Front Desk, you cannot integrate the visitor details with Pro-Watch.

•Integration failure message does not appear.

5. Save all the settings and restart the SmartPlus® service to enable the changes to take effect.

For more information about how to perform the above configuration steps, refer to the Configuration chapter in the SmartPlus® Installation, Configuration, and Troubleshooting Guide.

Step 6: Initiating the integration from LobbyWorks

To enable integration between Pro-Watch® and LobbyWorks, the SmartPlus® URL must be entered in LobbyWorks. During integration, the employee, and clearance code information stored in the Pro-Watch® database can be imported to the LobbyWorks database, based on your selection.

Company names are not imported from Pro-Watch® to LobbyWorks, instead they are added manually in LobbyWorks. While adding companies in LobbyWorks, the company names must exactly match the company names in Pro-Watch as they are case sensitive.

Example: Consider there are two companies A and B defined in Pro-Watch®. To add these companies in LobbyWorks, use the same names (maintaining case sensitivity) as defined in Pro-Watch®.

Note: If you are integrating for the first time, the host and clearance codes is imported. For further integration, you can import any of the entities.

To configure the integration settings in LobbyWorks

1. Expand **Advanced Configuration** in the navigation area and double-click **ACS**. The **PACS Integration** dialog box appears.

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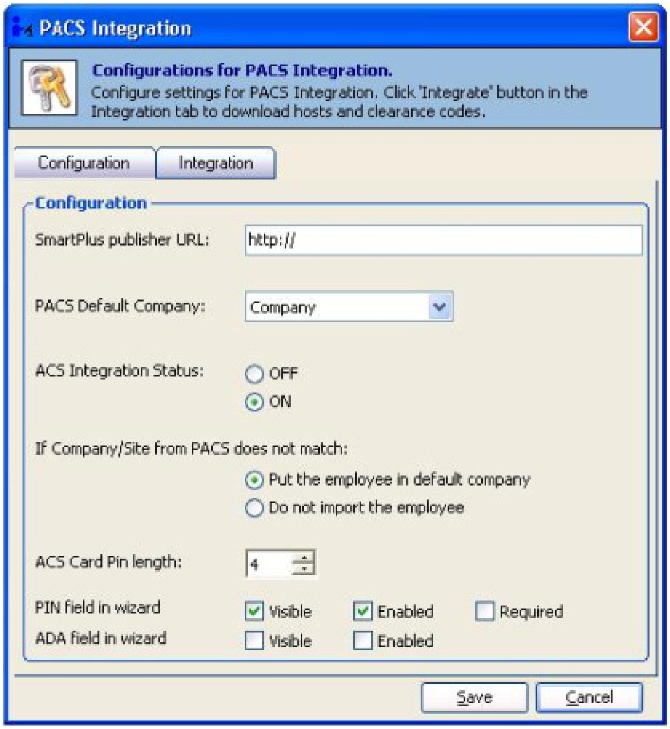


2. Type the **SmartPlus® publisher URL**.

   For information about the SmartPlus ®URL, refer to the Configuration chapter in the SmartPlus® Installation, Configuration, and Troubleshooting Guide.

3. Select the **PACS Default Company**.

4. Select the **ACS Integration Status**. to **ON** to start the ACS Integration.

5. Select the **Put the employee in default company** option button if the company/site name in Pro-Watch® does not match with that in LobbyWorks.

   OR

   Select the **Do not import the employee** option button if the company/site name in Pro-Watch® does not match with that in LobbyWorks.

6. Select the **ACS Card Pin Length** to set the pin length while registering a visitor at the Front Desk. The minimum and maximum Pin Length that you can set is **3** and **16** respectively.

7. For **Pin field in wizard**, select the following check boxes as applicable.

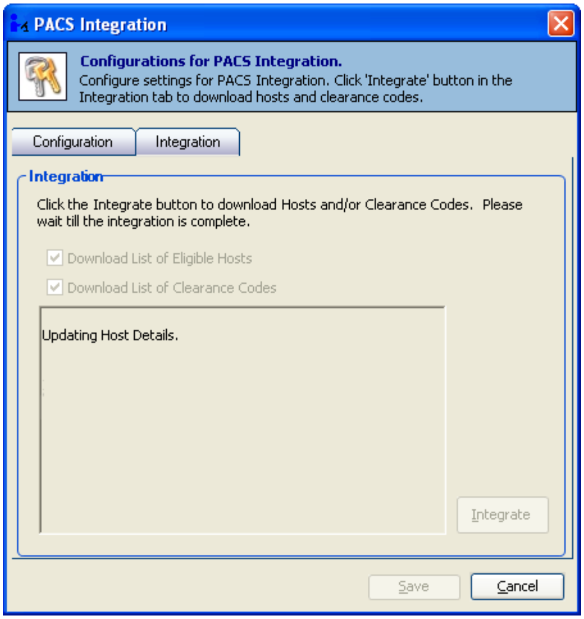
- Select the **Visible** check box to display the **Pin field in wizard** field in the Front Desk application.
- Select the **Enabled** check box to enable the **Pin field in wizard** field in the Front Desk application.
- Select the **Required** check box to make the **Pin field in wizard** field mandatory in the Front Desk application.

8. For **ADA field in wizard**, select the following check boxes as applicable.
    - Select the **Visible** check box to display the **ADA field in wizard** field in the Front Desk application.
    - Select the **Enabled** check box to enable the **ADA field in wizard** field in the Front Desk application
9. Click **Save** to save the URL information in the LobbyWorks database.
10. On the **Integratio**n tab, the check boxes to download the list of eligible hosts (employees) and clearance codes from the Pro-Watch® database are selected by default.

Note:

- Company names are not imported from Pro-Watch® to LobbyWorks.
- If the company and site are assigned in Pro-Watch®, then they are delegated to their respective companies in LobbyWorks. If either one of them is not assigned in Pro-Watch®, then the employee is delegated to the default site under the default company only if they are configured as default, else they are ignored.
- As assigned to in Pro-Watch®, the employees (hosts) are imported to the same companies in LobbyWorks. To enable this, you must map the companies from Pro-Watch® to LobbyWorks. If the mapping is not done in SmartPlus®, the employees are imported to the default company in LobbyWorks.
- Only those clearance codes which are selected to be exported to a visitor management system in Pro-Watch® are imported to LobbyWorks.
- All the clearance codes are moved to the default company, and must be assigned in LobbyWorks.
- The username is updated only if it is mapped from Pro-Watch®, if the username is not mapped, it is left blank.
- Picture is updated only for the first integration through Administrator, subsequent integration in Administrator does not update the picture. However picture is updated in the automated background host updates.

11. To start the integration,
    - Ensure that the **ACS Integration Status** is set to **On**.
    - Click **Integrate**. A message appears indicating that the employee, or/and clearance code information is being sent to the LobbyWorks database.



Warning:

- After clicking **Integrate,** wait until the integration process completes.
- Partial integration might have undesirable effects on the application.
- It is recommended that integrating the host must be done only once.
- Further integration is done automatically in the background.

12. After the integration is completed, click **Cancel** to close.

.

Appendix B - Active Directory

B

In this chapter...

Overview

Active Directory is a hierarchical collection of network resources such as user accounts, computers, printers, and so on, which is used for storing information about the objects on the network.

Example: Active Directory stores the information about the user account such as name, password, phone number, and so on, which enables the authorized user on the same network to access the information.

In the Active Directory, the objects are organized as domains, trees, organizational units (OUs), and sites.

After integrating Active Directory with LobbyWorks database, all the users from the Active Directory is imported to LobbyWorks database and not vice-versa.

The following table shows how the active directory fields are mapped to LobbyWorks field.

Active Directory Field	LobbyWorks Fields
sAMAccountName	Username
givenName	FirstName
sn	LastName
mail	EMail

Active Directory Field	LobbyWorks Fields
telephoneNumber	Phone
mobile	Mobile
department	Department

Objects

An object is a unique set of attributes that represents a user, a printer, or an application.

Site

A Site in an Active Directory represents a geographic location of the host network.

Domain

A domain contains objects grouped into containers called Organizational Units (OUs).

Container

A Container is an integral part of the Active Directory system. When you promote the first domain controller, by default a container is created. An administrator can also create a container for logical grouping, and to set the permissions. A container can be used for importing specific employees into a specific site from the Microsoft Active Directory, depending on the organization unit specification.

The following examples illustrate the container specifications.

- To retrieve users from a specific organizational unit:
  type *OU=US* in the **Container** textbox.

Criteria

A Criteria is an integral part of the Active Directory system. You can use the criteria for importing employees from a specific site from the Microsoft Active Directory depending on the attribute values, such as last name, e-mail address, account name, and so on.

The following examples illustrate the different criteria specifications.

- To retrieve all the active users from the company:
  type *&(!(userAccountControl:1.2.840.113556.1.4.803:=2))*

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(!(SAMAccountname=$))(GivenName=*)* in the **Criteria** text box.

- To retrieve all active users with user names starting with the letter "a":

  type *SAMAccountName=a** in the **Criteria** text box.

- To retrieve with e-mail address not empty:

  type *mail=** in the **Criteria** text box.

- To retrieve all users with first name:

  type *GivenName=** in the **Criteria** text box.

- To retrieve all users with under specific department:

  type *Department=Name* Or *Department=name** in the **Criteria** text box.

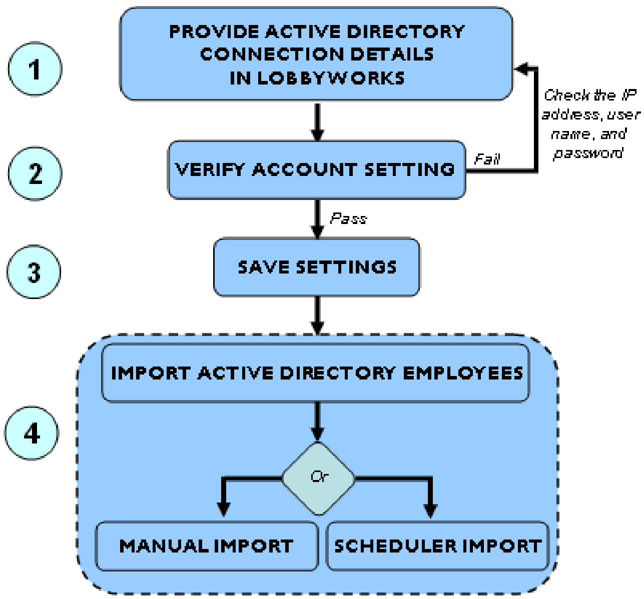
- To retrieve all users with Surname/Last name starts with “a”:

  type *Sn=a** in the **Criteria** text box.

Note: If you are importing the employee details for the first time, you must provide the criteria selection for all the employees.

Flow diagram

The following diagram illustrates the tasks and the order in which they must be performed to import the employees from the Active Directory.



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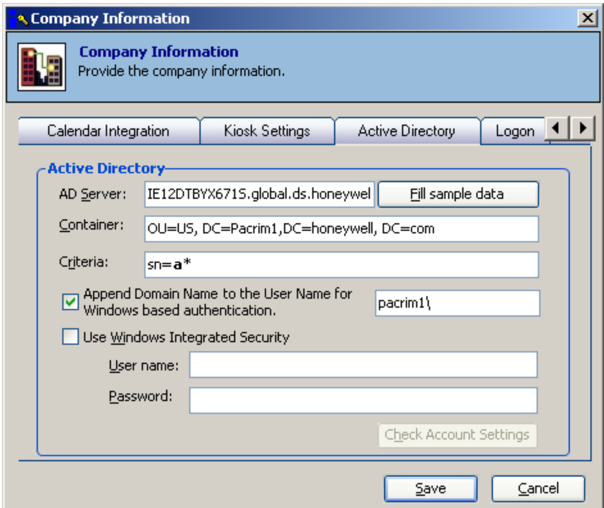
Step 1: Providing active directory connection details in LobbyWorks

Before importing the employee information to the LobbyWorks, you must provide the necessary connection details such as server, container, criteria, and windows credentials in LobbyWorks Administrator.

To provide the connection details

1. Log on to the LobbyWorks **Administrator** application.
2. Right-click Company for which you want to integrate with Active Directory in the navigation area, and click **Modify**. The **Company Information** dialog box appears.
3. Click the **Active Directory** tab.



4. In the **AD Server** box, type the server details.
5. In the **Container** box, type the values. Refer Container on page ii for example.
6. In the **Criteria** box, type the values. Refer Criteria on page ii for examples.

Note: Only 50 characters are allowed in the search criteria field.

7. Select the **Append the Domain to the username for Windows based authentication** check box, and type the domain name.
8. Type the **User name** and **Password**.
9. Select the Append the Domain to the username for Windows based authentication check box, and type the domain name.

Step 2: Verifying the connection settings

After providing the Active directory connection details, you must verify the connection settings.

- Click **Check Account Settings** in the **Company Information** dialog box.

Step 3: Saving the settings

After verifying the connection settings, you must save the settings.

- Click **Save** in the **Company Information** dialog box.

Step 4: Importing active directory information

You can import the employees from the Active directory in two ways.

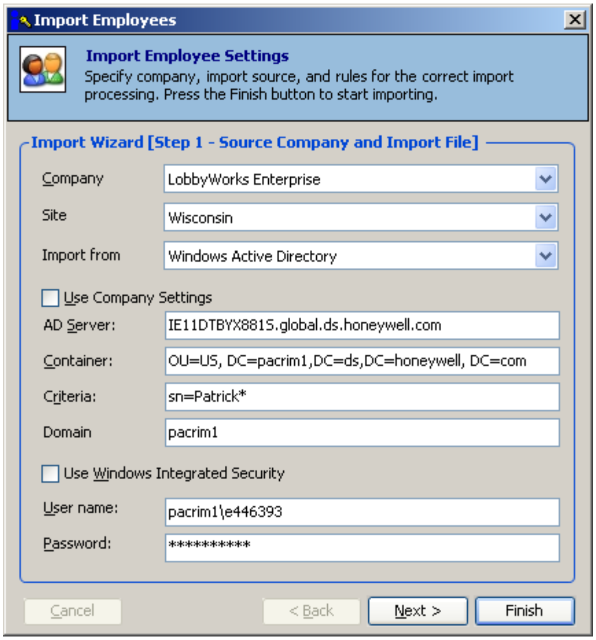
- Manually
- Scheduler

Importing manually

If you do not want to use the company settings to import the employees, you must provide the necessary details such as server, container, criteria, domain, and, windows credentials in LobbyWorks Administrator.

To import the Active Directory information manually

1. Log on to the LobbyWorks **Administrator** application.
2. Double-click **Profiles** and Company, and then click Site1.
3. Right-click **Employee** and click **Import**. The **Import Employees** dialog box appears.



4. In the **Import from** list, click *Windows Active Directory*. The wizard automatically shows active directory settings specified for the selected company.

5. Clear the **Use Company Settings** check box to specify the Active Directory settings.

Note: If you clear the check box, you cannot use company active directory settings.

6. In the **AD Server** box, type the server details.

7. In the **Container** box, type the values. Refer Container on page ii for example.

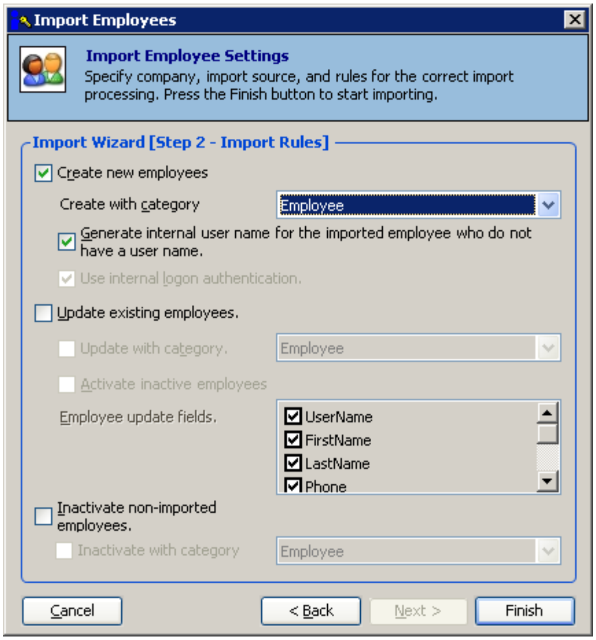
8. In the **Criteria** box, type the values. Refer Criteria on page ii for examples.

9. In the **Domain** box, type the name of the domain.

10. Clear the **Use Windows Integrated Security** check box.

11. Type the **User name** and **Password**.

12. Click **Next**. The **Import Employees** dialog box appears.



13. Select the **Create New employees** checkbox.

    a. Select the **Create with Category** checkbox, and then in the list you can select any of the following employee categories such as Employee, Administrator, Operator, Temporary host, and so on.

14. Select the **Update existing employees** checkbox to update the employees for the existing employee such as:

    - Employee, Administrator, Operator, and Temporary host
    - Username, First name, Last name, Phone, Email, Mobile phone, Pager, and Department.

15. Select **Inactive non-imported employees**.

16. Click **Finish**.

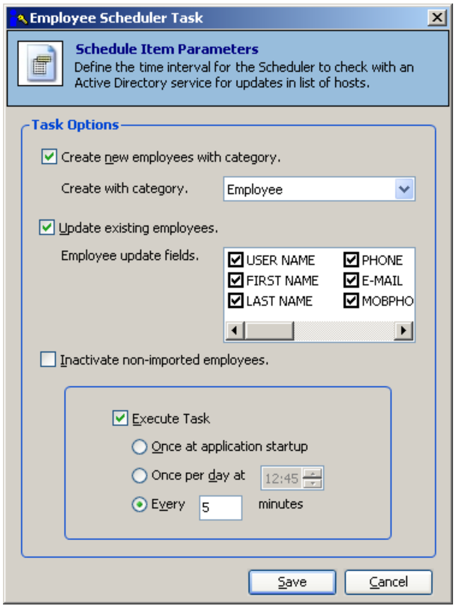
Importing by scheduler

After importing the employee information from the active directory, you can add, update it based on employee scheduler task settings.

To update the Active Directory information

1. Log on to the LobbyWorks **Administrator** application.
2. Double-click **Profiles** and **Company**, and then click **Site1**.

3. Double-click **Scheduler** and click **Client Tasks**.
4. Select **Employee List Task**. The **Employee Scheduler Task** dialog box appears.



5. To assign a default category to the employees who are imported:
   a. Select the **Create new employees with category** checkbox.
   b. Click the *Employee* from **Create with category** list.
6. Select the **Update existing employees** checkbox.
   a. Select the employee fields you want to update from the **Employee update fields** list such as:
      * Username, First name, Last name, Phone, E-mail address, Mobile phone, Pager, and Department.
7. Select the **Inactive non-imported employees** checkbox, to set inactive the non-imported employees.
8. Select the **Execute Task** checkbox, to execute the task. The following options are enabled. Select one of the them to specify the frequency at which the task must be performed.
   - **once at application startup**: The task is executed each time the front desk personnel logs onto the application.

- **once per day at**: The task is executed once a day, at the specified time.

  Example: To perform the task at 10:00 P.M everyday, select the option and enter 22:00 in the spin box.

- **every... minutes**: The task is executed every few minutes, based on the set value.

  Example: If you select 15 minutes, the task is repeated after an interval of 15 minutes.

9. Click **Save**.

Note:

- You must configure the Scheduler application in which you have assigned to the company.
- You must restart the Scheduler application after modifying the schedule tasks.

FAQs and known issues about active directory and domain information

Note: All the Know Issues and FAQs listed below are applicable to the Windows 2003 Server only.

Question

How can I access resources across domains?

Description

Active Directory domains within the same forest are implicitly connected by two-way transitive trusts. Authentication requests made from one domain to another are successfully routed through them, to provide a seamless coexistence of resources across domains. Users can gain access to resources in other domains only after being authenticated in their own domain. Domain controllers running Windows Server 2003 authenticate users and applications using Kerberos V5 or NTLM.

Suggestion

By carefully using domain local, global, and universal groups, administrators can effectively control access to resources located in other domains. Consider the following best practices.

- Organize domain users based on administrative needs, such as their locations or departments, and then create a global group, and add the appropriate user accounts as members.

  Example: Add all employee user accounts in the Sales department to the Sales Department global group, and add all employee user accounts in the Accounting Department to the Accounting Department global group.

- Create a domain local group, and add all global groups from the other domains that need the same access to a resource in your domain.

  Example: Employees in the Sales Department and Accounting Department global groups located in DomainA use similar print resources located in DomainB. To make future administration changes more flexible, create a domain local group called Print Resources in DomainB, and add as members both the Sales Department and Accounting Department global groups in DomainA.

- Assign the required permissions on the shared resource to the domain local group.

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Example: Assign permissions to the Print Resources domain local group located in DomainB so that its members, including the Sales Department and Accounting Department groups from DomainA, can access the printer located in DomainB.

References

http://technet.microsoft.com/en-us/library/cc787646.aspx

Issue

Dynamic or static content error: Applications are denied access to resources.

Description

After a clean install, IIS 6.0 runs in worker process isolation mode. Applications running in this mode use the Network Service identity by default. The Network Service is an account with few user rights and therefore provides better security by restricting access to resources on the Web server. If you migrate applications to IIS 6.0 while the server is in worker process isolation mode, and if your applications previously ran in-process (in Inetinfo.exe) as Local System, the applications may fail to access resources because of the restrictions set by the Network Service identity.

Suggestion

The Local System account has access to almost all resources on the operating system, and therefore creates serious security implications. You should avoid using the Local System account when possible. If it is absolutely necessary to use the Local System account on an application, run that application in a new application pool in its own virtual directory to reduce the attack surface by isolating the application. As an alternative, if your application needs permission to use the Trusted Computing Base (TCB), run the application as a configurable identity and assign the TCB permission to the configurable identity. This alternative, however, still presents a security risk because the TCB permission is very powerful.

References

http://msdn.microsoft.com/en-us/library/ms524996.aspx#modes

Issue

Dynamic or static content error: Requests for Dynamic Content Return 404 Error.

Description

In order to take a more proactive stance against malicious users and attackers, IIS is installed in a highly secure and locked mode.By default, IIS serves only static content. So features like ASP, ASP.NET, server-side includes, WebDAV publishing, FrontPage® Server Extensions, and Common Gateway Interfaces must be enabled for them to work. If you do not enable the functionality after installing IIS, by default, IIS returns a generic 404 custom error page to prevent disclosure of configuration information. IIS also writes the 404 error with the substatus code of 2 (404.2) in the W3C Extended log files, by default.

Suggestion

To enable or disable a Web service extension

1. Choose **Start** > **Control Panel** > **Administrative Tools** > **Internet Information Services**.
2. Expand **local computer**.
3. In the details pane, click **Web service extension**.
4. Click **Allow**, to enable a disabled Web service extension.
5. Click **Prohibit**, to disable an enabled Web service extension.
6. Click **OK**.

Reference

http://msdn.microsoft.com/en-us/library/ms524996.aspx#modes

Issue

Dynamic or static content error: Worker Process Recycling Drops Application Session State.

Description

By default, worker processes recycle after 120 minutes. If your ASP applications are not designed to store the session state while a worker process is recycling, then the session state in that ASP application can be lost. To remedy this problem, you can either store the session state in a database or disable worker process recycling.

Suggestion

To disable worker process recycling

1. Choose **Start > Control Panel > Administrative Tools > Internet Information Services**.
2. Expand **local computer.**
3. Right-click **Application pool**, and click **Properties**.
4. On the **Recycling** tab, clear the **Recycle worker processes** (in minutes) check box.
5. Click **OK**.

References

http://msdn.microsoft.com/en-us/library/ms524996.aspx#modes

Issue

Dynamic or static content error: Server-Side Include Directives (#include) Return 404 Error (for .stm Files) or 0131 Error (for .asp Files).

Description

If your ASP page uses the #include server-side include directive and the ".." notation to refer to a parent directory, the directive will return an error unless you have reconfigured the AspEnableParentPaths metabase property. This property is set to false by default. If set to true, this property constitutes a potential security risk because an include path may access critical or sensitive data files outside the application root directory.

Suggestion

To enable parent paths through Internet Information Services

1. Choose **Start > Control Panel > Administrative Tools > Internet Information Services**.
2. Expand **local computer**, right-click the application you want to configure.
3. Click **Properties**.
4. Click the **Directory** tab, and then click **Configuration**.
5. Click the **Options** tab.
6. In the **Application configuration** section, select the **Enable parent paths** check box.
7. Click **OK**.

References

http://msdn.microsoft.com/en-us/library/ms524996.aspx#modes

Issue

Dynamic or static content error: CGI Processes Will Not Start

Description

If your CGI processes do not run, ensure that the CGI Web service extension has been enabled. See *Issue- Requests for Dynamic Content Return 404 Error.* Also, CGIs does not start unless the account on which the CGI processes run are assigned certain user rights. You can add the account as a member of the IIS_WPG group and assign the account the following two user rights:

- Adjust memory quotas for a process.
- Replace a process level token.

Suggestion

To assign user rights to an account on the local computer

1. Choose **Start** > **Control Panel** > **Administrative Tools** > **Local Security Policy**.
2. Expand **Security Settings** and double-click **Local Policies**.
3. Double-click **User Rights Assignment**.
4. In the details pane, double-click the policy you want to change.
5. Click **Add User or Group**.
6. In the **Enter the object names to select** text box, type the user or group name.
7. Click **OK**.

References

http://msdn.microsoft.com/en-us/library/ms524996.aspx#modes

Issue

Dynamic or static content error: ASP.NET Pages are Returned as Static Files.

Description

If you installed IIS 6.0 without installing ASP.NET, ASP.NET files can be returned as static files. This error can also occur if you reinstalled IIS 6.0 without re-registering ASP.NET.

Suggestion

To learn how to remedy this error, see ASP.NET IIS Registration Tool in the help.

References

http://msdn.microsoft.com/en-us/library/ms524996.aspx#modes

Issue

Connection error: Client Requests Receive 503 Error.

Description

Check the error event log to determine

If the 503 error was detected in HTTP.sys or in the World Wide Web Publishing Service (WWW service).

If the error was detected in HTTP.sys, it could imply that there were too many queued requests, resulting in the HTTP.sys exceeding its application pool queue length limit.

If the 503 error was detected in the WWW service, then the problem may be that IIS s initiated the rapid-fail protection because too many worker processes assigned to an application pool became unhealthy in a given period of time. To remedy this problem, increase the number of failures or the time period before the rapid-fail protection initiates. You should test your application for memory leaks or other problems that may be the source of the unhealthy worker processes.

Suggestion

To change an application pool queue length limit

1. Choose **Start > Control Panel > Administrative Tools > Internet Information Services**.
2. Expand **local computer**, and then expand **Application Pools**.
3. Right-click **Application** and click **Properties**.
4. Click the **Performance** tab.

5. In the Request queue limit section, select the **Limit the kernel request queue to** check box, and type the maximum number of queued requests.
6. Click **OK**.

To configure rapid-fail protection

1. Choose **Start** > **Control Panel** > **Administrative Tools** > **Internet Information Services**.
2. Expand **Local Computer**, and then expand **Application Pools**.
3. Right-click **Application** and then click **Properties**.
4. Click the **Health** tab.
5. In the **Failures** box, type the number of worker process failures to be detected before disabling the worker process.
6. In the **Time period** box, type the number of minutes during which failure totals are accumulated.
7. Click **OK**.

References

http://msdn.microsoft.com/en-us/library/ms524996.aspx#modes

Issue

Connection Error: Anonymous Accounts (IUSR_ computername) Attempting Sub-Authentication Logon Receive 401 Error.

Description

The sub-authentication component, Iissuba.dll, is not enabled by default in IIS 6.0. In earlier versions, Iissuba.dll allowed IIS to manage passwords on anonymous accounts, which created a potential security risk.

Suggestion

In IIS 6.0, you can use sub-authentication to manage passwords for anonymous accounts by meeting the following requirements.

- For applications which have anonymous access, the worker process runs on the Local System.
- The sub-authentication component, Iissuba.dll, is registered.
- The AnonymousPasswordSynch metabase property is enabled (set to true).

The actions taken to meet the above requirements differ between clean installs of IIS 6.0 and upgrades to IIS 6.0 from installations of IIS with sub-authentication configured.

For information on the procedures to configure sub-authentication, see Anonymous Authentication in the help.

References

http://msdn.microsoft.com/en-us/library/ms524996.aspx#modes

Issue

Connection Error: Clients Cannot Connect to Server.

Description

The Windows Server 2003 family provides a software-based firewall to prevent unauthorized connections to your server from remote computers. The Internet Connection Firewall (ICF) is disabled by default. However, if you have enabled the firewall in its default configuration after installing a member of the Windows Server 2003 family and before installing IIS, clients will not be able to connect to your server.

Suggestion

To configure Internet Connection Firewall for Internet Information Services

1. Choose **Start** > **Control Panel** > **Network Connections**.
2. Right-click **Local Area Connection**, and click **Properties**.
3. Click the **Advanced** tab.
4. If you do not want to use the ICF, make sure the **Protect my computer and network by limiting or preventing access to this computer from the Internet** check box is cleared, and click **OK**.
5. If you want to use the ICF, make sure the **Protect my computer and network by limiting or preventing access to this computer from the Internet** check box is selected, and click **Settings**.
6. On the **Services** tab, enable a service to which you want to allow access to clients.
7. In the **Service Settings** dialog box that appears after enabling a service, perform one of the following:

- If you are enabling a service on the computer you are working on, the correct computer name is already filled in.Click **OK**.
- If you are enabling a service on a different computer on your network, type the name or IP address of the computer hosting the service you are enabling, and click **OK**.

8. Repeat steps 6 and 7 to enable the services which must be accessible to the clients.

References

http://msdn.microsoft.com/en-us/library/ms524996.aspx#modes

Issue

Connection Error: Access Denied to Console Applications in System32 Directory.

Description

Requests that use console applications in the Windows System32 directory, such as Cmd.exe, are denied access unless the remote user making the request is an authenticated member of the Administrators group.

Suggestion

The denial is the result of special access control lists (ACLs) on all console application programs in the Windows System32 directory, to restrict access to administrators, Local System, interactive users, and services. The ACL restriction does not affect local logon users who need access, or own custom CGI executable programs.

References

http://msdn.microsoft.com/en-us/library/ms524996.aspx#modes

Issue

Connection Error: Client Requests Error-out or Time-out.

Description

In IIS 6.0, settings are set to aggressive and secure defaults to minimize attacks due to time-outs and limits which were previously too generous.

Appendix C - Calendar Integration

C

In this chapter...

Overview

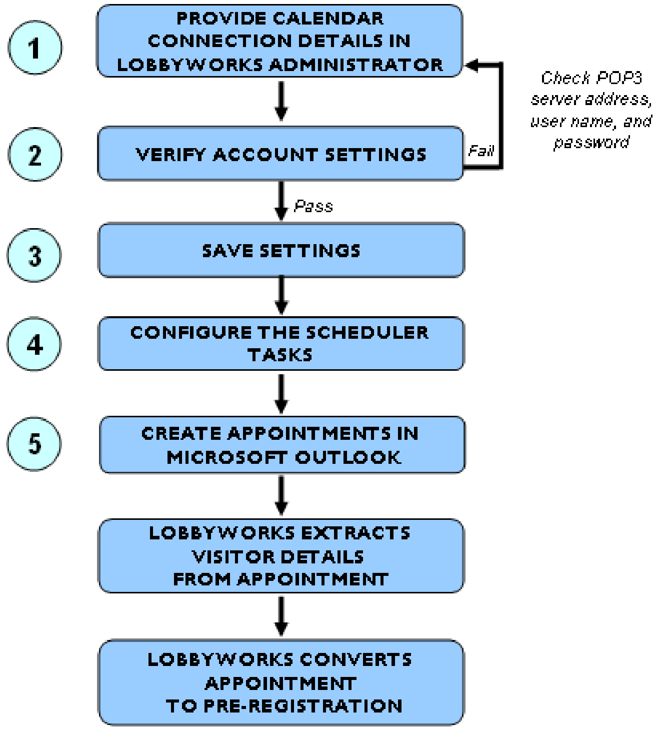
The Calendar Integration in LobbyWorks allows pre-registration of the visitors by means of the appointments created in Microsoft™ Outlook.

After creating the appointments, LobbyWorks:

- Uses a specific logic to extract visitor details from the Vcalendar specification.
- Converts appointments to pre-registrations.

The following diagram illustrates the Calendar Integration in LobbyWorks.

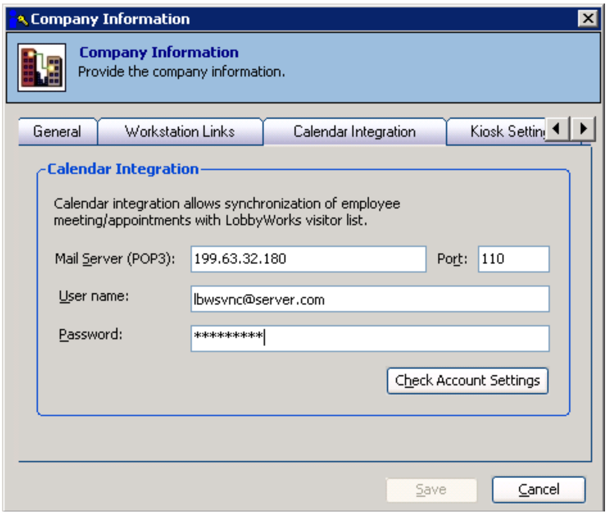
Flow diagram



Step 1: Providing the calendar connection details

Before pre-registering the visitors appointment, you must provide the calendar connection details such as POP3 server, port number, username and password in LobbyWorks Administrator.

1. Log on to the LobbyWorks **Administrator** application.
2. Double-click **Profiles,** right-click **Company** and click **Modify**. The following screen appears.



3. Click the **Calendar Integration** tab.
4. In the **Mail Server (POP3)** text box, type the name or IP address of the mail server or POP3 server or exchange server.

Note: POP3(Post Office Protocol 3) is an internet-based standard used for retrieving the e-mails sent by a user from an e-mail server. Where “3" represents the third revision of the standard.

5. In the **Port** text box, type the port number of the mail server for which the POP3 protocol is enabled. The default port number is 110.
6. Type the **User name** and **Password**.

Step 2: Verifying the connection settings

After providing the connection details, you must verify the connection settings.

- Click **Check Account Settings** in the **Company Information** dialog box.

Step 3: Saving the settings

After verifying the connection settings, you must save the settings.

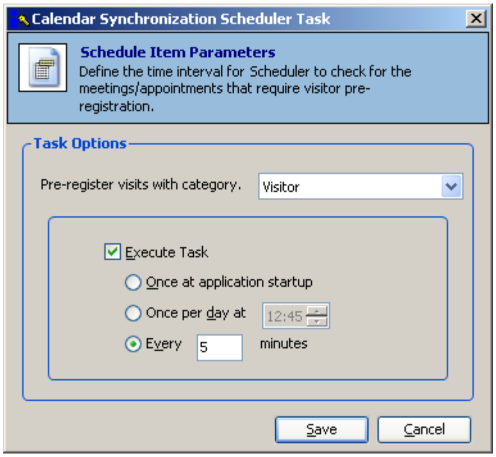
- Click **Save** in the **Company Information** dialog box.

Step 4: Configuring the scheduler tasks

You can configure the time interval to automatically import the visitors details from the POP3 in the Administrator application.

To configure the scheduler

1. Log on to LobbyWorks Administrator.
1. Double-click **Profiles** and **Site1**.
2. Click on the company for which you want to provide the calendar synchronization.
3. Double-click on the site for which you want to provide the scheduler settings
4. In the right pane, double-click **Calendar Synchronization Task**. The following dialog box appears:



5. Under **Task Options**, select the category in the **Pre-register visits with category** list and then specify the scheduler task interval.

6. Click **Save**.

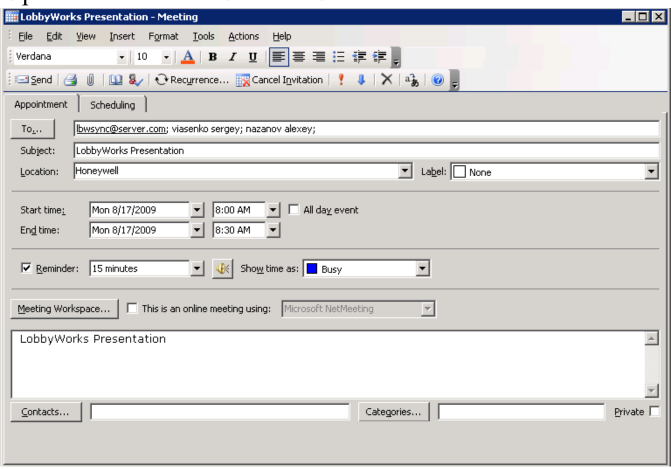
Step 5: Creating an appointment in Microsoft Outlook™

You can create a new appointment using the Microsoft Outlook™ by providing the necessary details such as visitors e-mail address, subject, location, and so on. Before creating an appointment, you must meet the following prerequisites.

- All LobbyWorks employees must have their e-mail addresses configured in the LobbyWorks database.
- Before adding a visitor to the meeting request, the host/employee has to add the visitor details to the Outlook contact list with the name configured as “First-Name Last-Name”.
- The default visit purpose must be “Meeting”", as it is a prerequisite

To create a new appointment.

1. Open the Microsoft Outlook Calendar.



2. Select the **Start time** and **End time** for the appointment. These timings are converted to Expected Date and Expired Date for the visitor, during pre-registration.
3. Type the **Subject** and **Location** for the meeting. These details are displayed in the visit note during pre-registration of the visitor.
4. Click **Invite Attendees**. The **To:** textbox is displayed.
5. In the **To...** text box, type the e-mail addresses of the meeting attendees and ensure that you provide the e-mail address for synchronization in the Lobbyworks database.

Note: You must send the invitation to the visitor's username configured in the application while pre-registering.

Example: lbwsync@server.com

6. Click **Send**. The appointment is sent to the meeting attendees and to the LobbyWorks database server.

Extracting visitor details from the appointment

LobbyWorks uses a specific logic to extract visitor details from the Vcalendar specification. The process has three trials. If a trial fails, then the next trial is executed in the following order.

Trial 1: Using the Vcalendar attendee tag and display name

- Checks for "." Space separation between First name and Last name [like John Smith]
- Check for "." (Dot) separation between first name and last name [like John.Smith]
- Check for "_" (Under Score) separation between First Name and last Name [like John_Smith]

Trial 2: Using the E-mail address specified for the guest (assuming E-mail Address contains First name and Last name)

- Checks for "." (Dot) separation between first name and last name [like John.Smith@MyDomain.com]
- Checks for "_" (Under Score) separation between First Name and last Name [like John_Smith@MyDomain.com]

Trial 3: Using the E-mail address search for a visitor match in the LobbyWorks database

- Checks for First Name and Last Name taken from the matched visitor.

If all the three trials fail, then the visitor cannot be pre-registered in LobbyWorks.

Converting appointment to pre-registration

The following actions take place when the appointment is delivered to the LobbyWorks database.

1. The scheduler checks the mail box of synchronization e-mail address.

Note: The scheduler performs this task, based on the time at which it is scheduled to run. The settings for the scheduler to execute the outlook integration is configured in the Administrator application.

2. If there are any e-mails to the e-mail address, the scheduler verifies if the sender is a valid host in LobbyWorks. If the sender is a host in a company other than the one in which the scheduler is running, the appointment is ignored. If the sender is a valid host, the scheduler checks the appointment time.

If the appointment time is later than the time at which the scheduler is running, the visitor is pre-registered. If the appointment start time is earlier than the scheduler time, the appointment is ignored.

FAQs about Outlook integration

Question

What happens when there is a change in the meeting time?

Answer

When there is any change to the appointment start or end time, the changed timings are updated in the visit details of the pre-registered visitor.

Question

What happens when a visitor declines the meeting request?

Answer

If the visitor declines the request for an appointment, the visitor response is sent only to the host and is not handled in LobbyWorks.

Question

What happens when an appointment is deleted?

Answer

If the host deletes the appointment and sends the response to the meeting request, the pre-registered visitors are deleted in LobbyWorks application.

Question

What happens when there is change in the invitee list?

Answer

If there is a change in invitees list, the changes are reflected in LobbyWorks application accordingly.

Question

What happens when there is a recurring meeting and change in recurring meeting time?

Answer

Pre-registration for recurring meetings are not currently handled by LobbyWorks.

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Glossary

Glossary Term	Description
Administrator	Used to configure and control the working of all the applications in the suite.
Badge Preprint	Used by the front desk personnel to print badges.
Badges	Contains unique information about the visitor.
Building	A building is configured after completing the settings for the Company and Site.
Clearance Code	Clearance code refers to a specific area within the premises, that a visitor is allowed access to.
Company	A Company in LobbyWorks is the topmost entity.
Employee	Employees in LobbyWorks are the hosts for visitors entering the premises.
External Devices	Devices such as printers, scanners, web camera, and so on.
Front Desk	Used by the personnel to enter visitor, asset, and delivery information and print badges for them.
Kiosk	Used by visitors to self-register.
Notify	Used by the Front Desk personnel and hosts to communicate with each other about the arrival of visitors and accepting/declining them.
Reporter	Used to generate reports.

Glossary Term	Description
Scheduler	Used to schedule the frequently performed tasks by the Front Desk.
Site	A site is configured after completing the settings for the Company.
Visitor	A visitor is a person who visit the premises.
Watch List	A list of visitors who are monitored closely.
Web Center	It is a web-application used by the employees to pre-register and manage their visitors' information.
Workstation	Workstations are computers connected to the LobbyWorks data network.

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Document 800-03829 rev B
Date: January 2011

Honeywell