

Jolly Presents...

# Lobby Track 4 Getting Started Guide

*An Introduction to Lobby Track*

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## Introducing Lobby Track 4

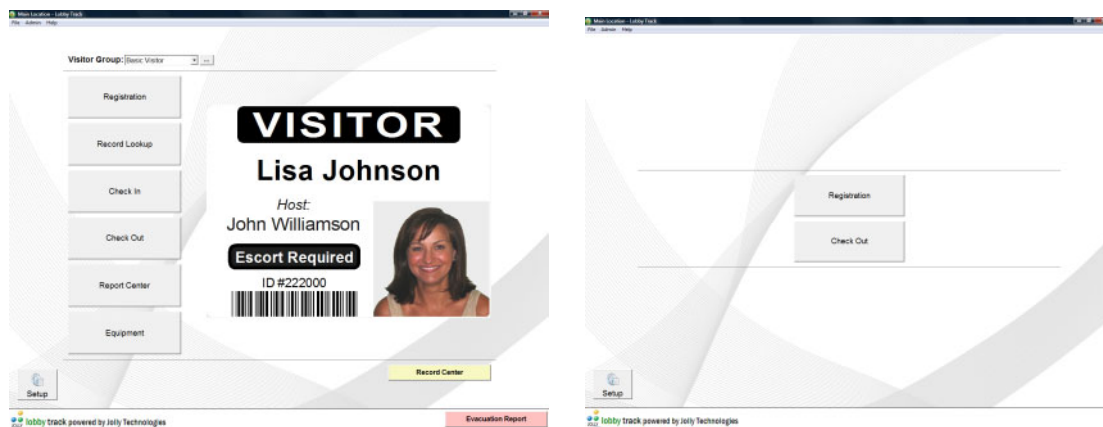
Lobby Track is a software tool designed for verifying, tracking and enforcing access policy for people and equipment passing through lobbies or other gateways.

Lobby Track is flexible: It may be tailored for any type of facility and any group of people. Included are preconfigured databases to accommodate the visitors, employees, contractors, students and associates for corporate, educational, healthcare, government or membership organizations. It is also designed to be easily linked to users' existing data systems. The data fields and activity logs are user definable for any particular purpose.

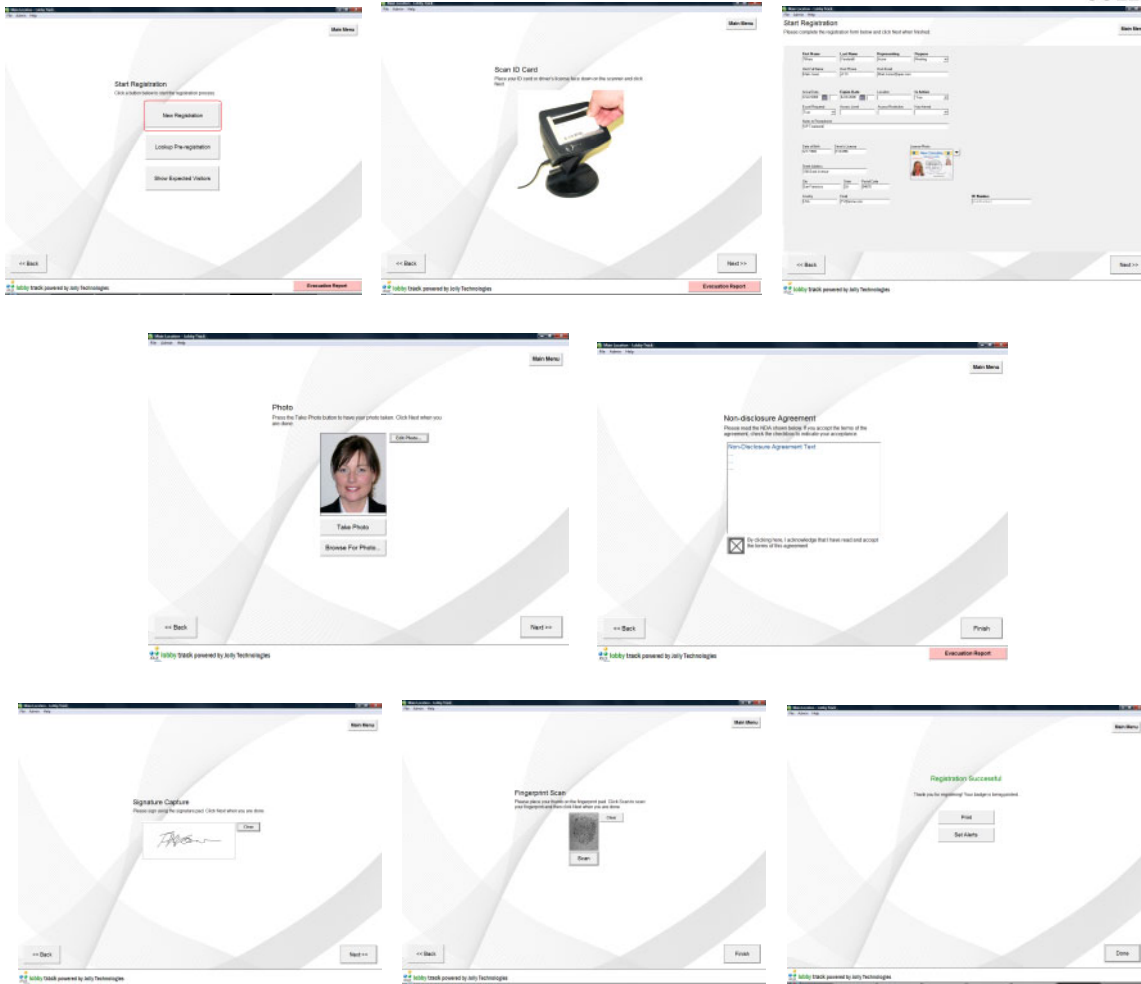
*This guide provides a general overview of product components and instructions on getting started. This guide is a supplement to the Help system provided within the product. The integrated Help system provides comprehensive configuration details.*

## Overview

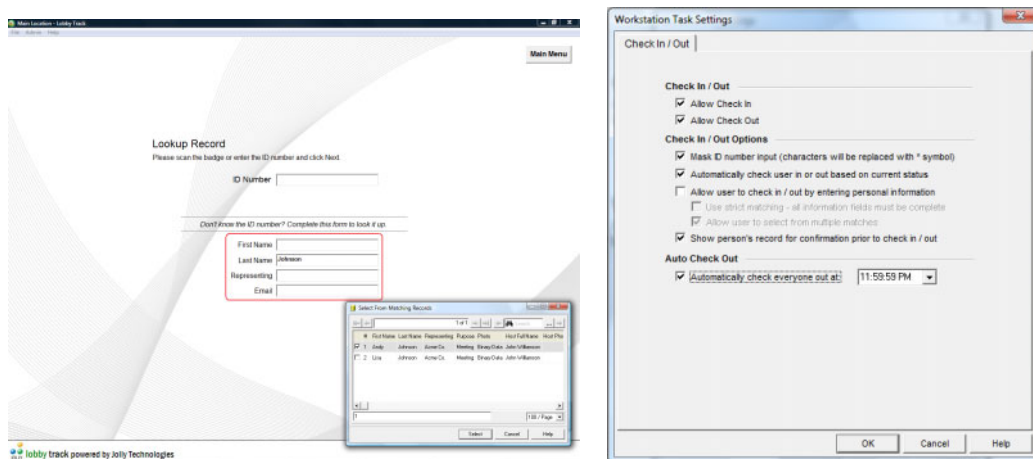
Lobby Track is menu driven: It presents directed tasks that make the reception process easy. The *Main Menu* presents buttons that identify the regular tasks. Lobby Track is extremely customizable: Available tasks and data to be collected are easily definable.



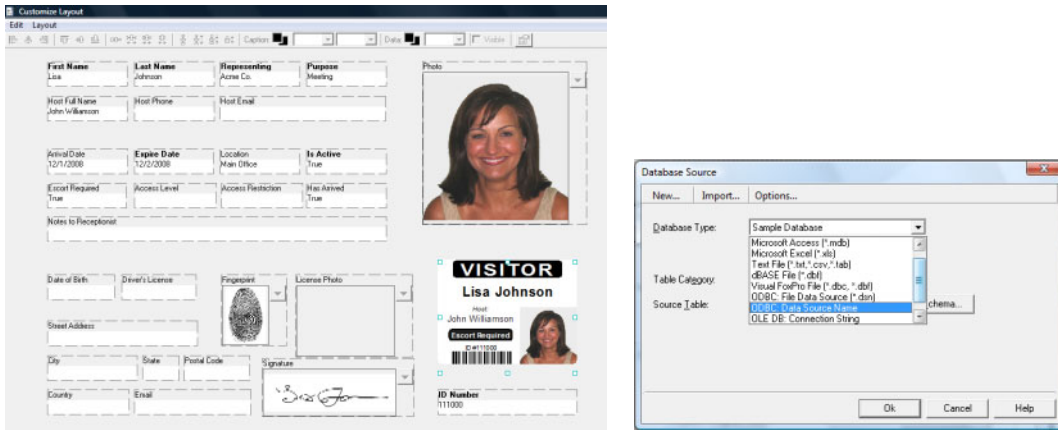
Define the steps of *your* registration process. The *Registration* process can incorporate driver's license/passport scan, manual keyboard entry, photo capture, non-disclosure agreement, signature capture, fingerprint, capture, badge print, and check in.



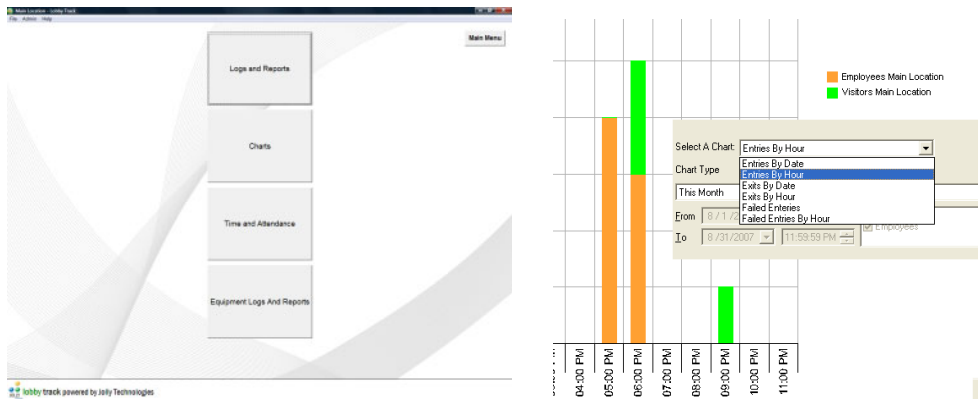
Define your lookup fields for record retrieval and check in/out policy:



The database, the fields in the database and record layout are customizable:



Report Center provides details of all activities. Customizable logs, charts and time-and-attendance reports are built-in:

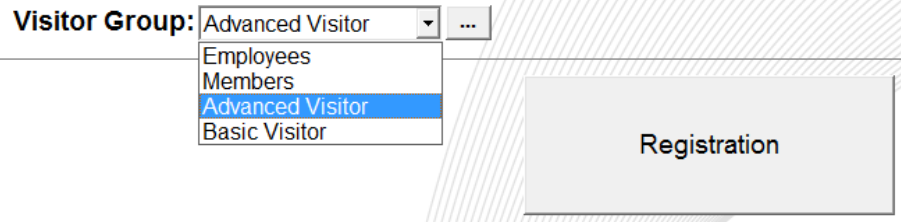


#	Log ID	Date	Action	First Name	Last Name	Group	Result	Location
1	170	8/30/2007 5:10:34 PM	Check In	Lisa	Johnson	Employees	Success	Main Location
2	171	8/30/2007 5:10:38 PM	Check In	Michelle	Smith	Employees	Success	Main Location
3	172	8/30/2007 5:10:42 PM	Check In	Patrick	Combs	Employees	Success	Main Location
4	173	8/30/2007 5:10:48 PM	Check In	Carlos	Diaz	Employees	Success	Main Location
5	174	8/30/2007 6:51:02 PM	Check In	James	Toletoy	Visitors	Success	Main Location
6	175	8/30/2007 6:51:08 PM	Check In	Daniel	Belmont	Visitors	Success	Main Location
7	176	8/30/2007 6:51:13 PM	Check In	Molly	Brown	Visitors	Failed	Main Location
8	177	8/30/2007 6:51:18 PM	Check Out	Lisa	Johnson	Employees	Success	Main Location
9	178	8/30/2007 6:51:22 PM	Check In	Lisa	Johnson	Employees	Success	Main Location
10	179	8/30/2007 6:51:25 PM	Check Out	Lisa	Johnson	Employees	Success	Main Location
11	180	8/30/2007 6:51:34 PM	Check In	Lisa	Johnson	Employees	Success	Main Location
12	181	8/30/2007 6:51:39 PM	Check Out	Michelle	Smith	Employees	Success	Main Location

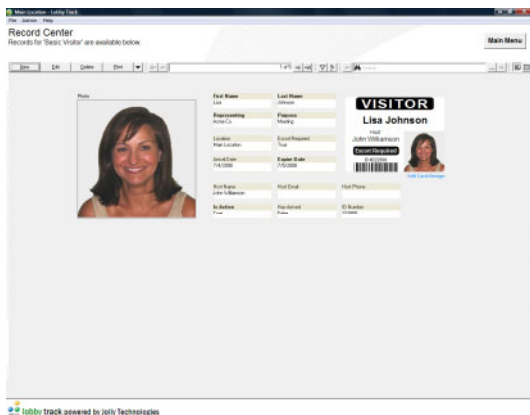
#	First Name	LastName	DateIn	TimeIn	DateOut	TimeOut	HoursWorked	AccumulatedHours
1	Patrick	Combs	8/30/2007	6:51:43 PM	8/30/2007	9:07:29 PM	2.267	2.267
2	Carlos	Diaz	8/30/2007	5:10:48 PM	8/30/2007	9:07:48 PM	3.95	3.95
3	Lisa	Johnson	8/30/2007	5:10:34 PM	8/30/2007	6:51:18 PM	1.683	1.683
4	Lisa	Johnson	8/30/2007	6:51:22 PM	8/30/2007	6:51:25 PM	0	1.683
5	Lisa	Johnson	8/30/2007	6:51:34 PM	8/30/2007	9:07:42 PM	2.267	3.95
6	Michelle	Smith	8/30/2007	5:10:38 PM	8/30/2007	6:51:39 PM	1.683	1.683

## A Quick Start

Lobby Track is preconfigured with four sample *Visitor Groups*: *Visitors Basic*, *Visitors Advanced*, *Employees* and *Members*. They include sample databases and sample badge designs.



The groups vary by their badge designs and database fields. Fields and layout can be changed at any time (*layout is not customizable in the Small Business Edition*).



Basic Visitor Group

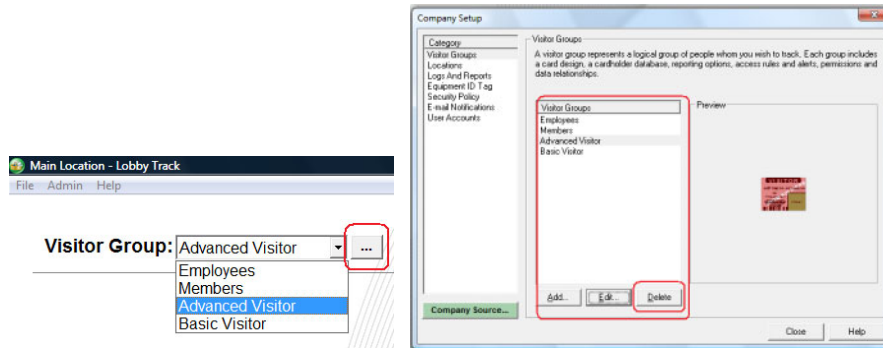


Advanced Visitor Group

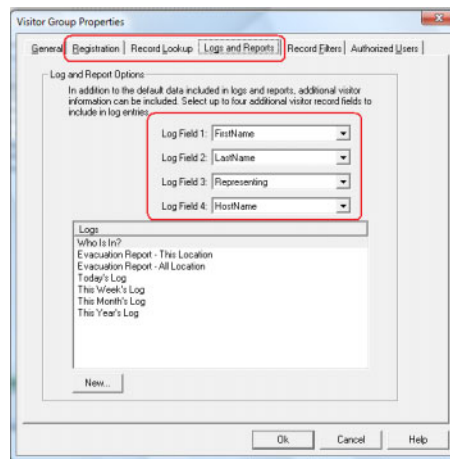
Badge design may be modified by selecting “*Edit Card Design*” below the image on the *Record Center* or from the *General Tab* on the *Visitor Group Properties* dialog. This will launch *ID Flow Designer*:



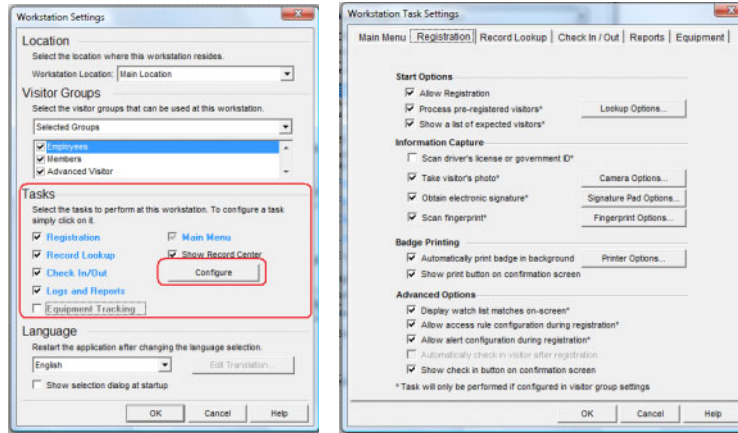
It is suggested that the unused sample groups be removed to avoid confusion at a later time. Click on the ellipsis button to the right of the *Visitor Group* selection box to open the *Company Setup*. Highlight the Visitor Group to be removed and select *Delete*.



To modify image, lookup and report field mapping go to *Company Setup* highlight the *Visitor Group* and select *Edit*. This will open the *Visitor Group Properties* dialog.



What tasks are shown on the *Main Menu* screen, registration processes, capture devices and are set in the *Workstation Settings*. Click on the blue hyperlink to configure the individual tasks or click the *Configure* button to configure them all at once.



## Global and Workstation Settings

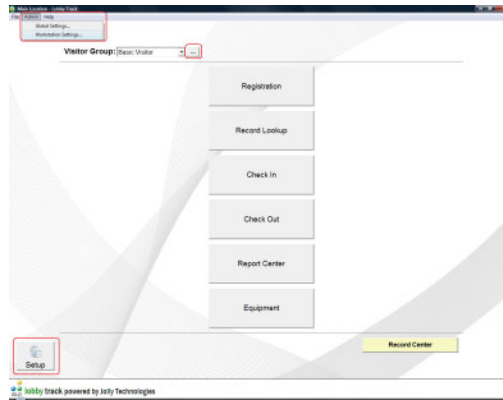
*Lobby Track is designed to run across multiple locations in a networked environment. The Language, Tasks and Visitor Groups displayed may vary from workstation to workstation because they may be used differently at different places. Dividing configuration between Global and Workstation settings allows for this.*

Global Settings include the *Visitor Groups, Locations, User Accounts, Email Notification* and other settings.

For many of the workstation's *Tasks* to work properly, items need first be configured in the *Visitor Groups* settings.

## Global Settings

Get to *Global Settings* from the *Admin Menu*, the ellipsis button to the right of *Visitor Group* (when more than one group is present) or through the *Setup* button. Only the *Administrator* has rights to these settings.

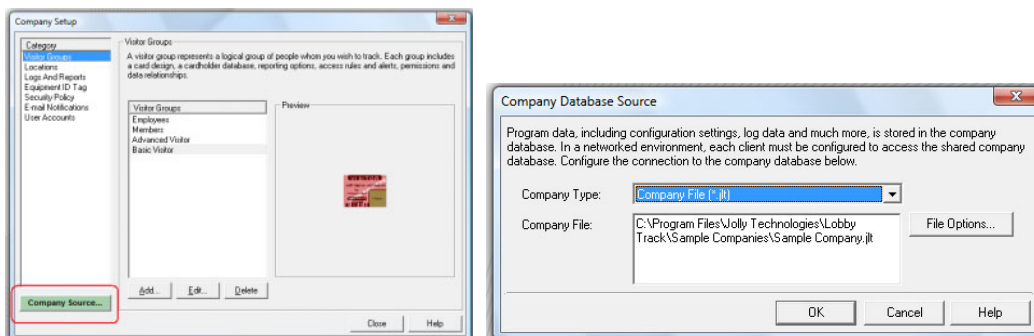


## Company Source – Networking Multiple Copies

The *Company Source* is a central database file that contains Lobby Track’s configuration, user accounts, cardholder groups and logs. It does not contain the Workstation Settings. It does not contain the visitor groups databases, though it points to them.

When networking multiple copies of Lobby Track, place the *Company Source* on a central server or shared workstation. All networked copies should point to the same *Company Source*.

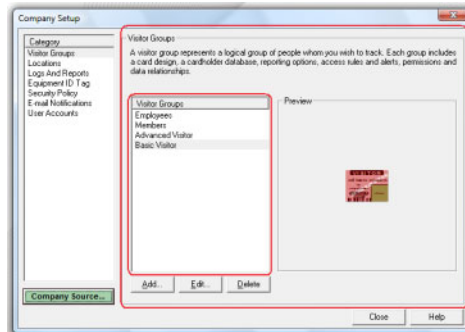
There are two versions of the Company Source File/Server available: MS Access and MS SQL. The MS Access version is included. The MS SQL version is additional.



## Visitor Groups

*Most organizations use a single Visitor Group, however, Lobby Track allows for connecting to multiple groups and multiple data sources simultaneously. This is ideal for tracking employees and visitors simultaneously or for multi-tenant buildings.*

The *Visitor Groups* is the active selection when the *Company Setup* is first opened. To add a new visitor group select *Add*, to edit an existing group select *Edit*. Either selection will open the *Visitor Groups Properties* tab.

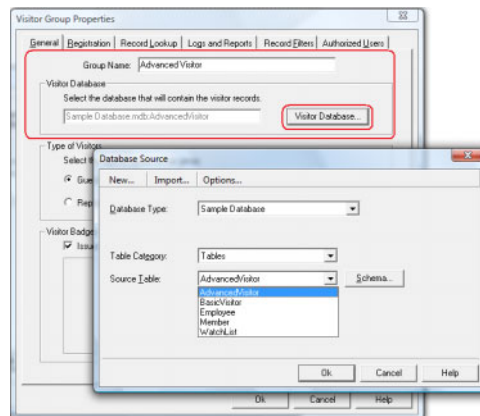


### General Tab

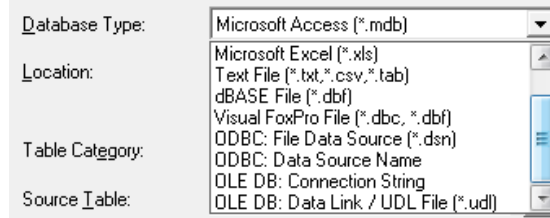
This tab contains critical information for the Visitor Groups database, type of visitor and badge design. Give the group a name.

### Visitor Database

Lobby Track is open-data source. It may utilize existing databases, a new database or one of its built-in sample databases. The visitor databases contain the visitor's information. Select the database in this dialog.



Included in the sample database are five tables that contain basics for Visitors, Employees, Members and a Watch List. For other existing databases, select database type for a selection of database types. Then point to the database source.

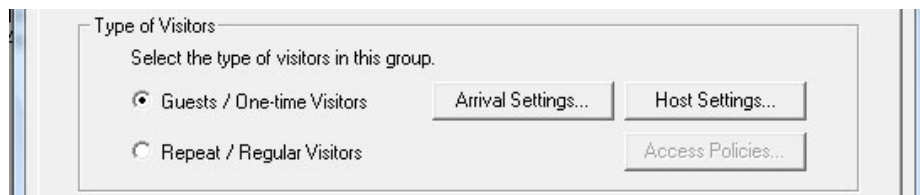


**Important Note:** Databases must contain certain fields for certain operations within Lobby Track to function. The name of these fields is not important, that they exist is.

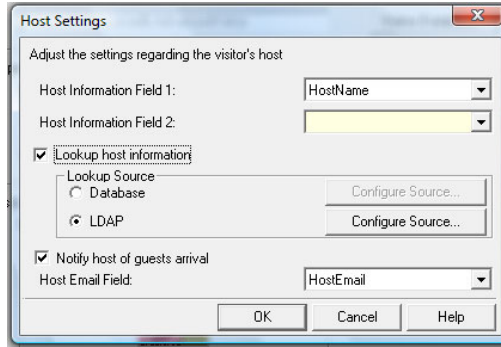
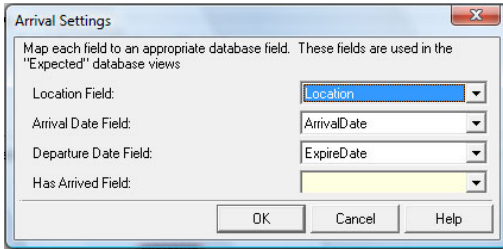
Field	Type	Required for
ID Number	Number/Autounumber	Locating record
Location	Text	Showing expected arrivals at this location
Arrival Date	Date	Showing arrivals today
Expire Date	Date	Denying access when expired
Has Arrived	Boolean	Showing who has yet to arrive
Host Name	Text	Looking up host from LDAP or host database
Host Email	Text	Emailing host of visitor arrival
Is Active	Boolean	Denying access when not active
Photo	Image	Capturing a headshot
Signature	Image	Capturing a signature
Fingerprint	Image	Capturing a fingerprint

### Visitor Type

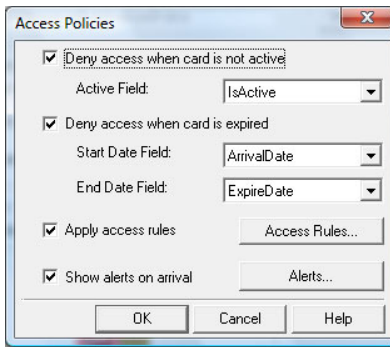
A visitor group can be one of two visitor types, *Guest/One-time Visitors* or *Repeat/Regular Visitors*.



Guests have *Arrival Settings*, so that the *Expected Visitor* report will display, and *Host Settings*, so that a host may be emailed when their guest arrives.



Repeat/Regular Visitors are used for employees and membership organizations -- essentially for people who return regularly. They contain access policies and may have custom rules for alerts and access (*Enterprise Edition Feature*).



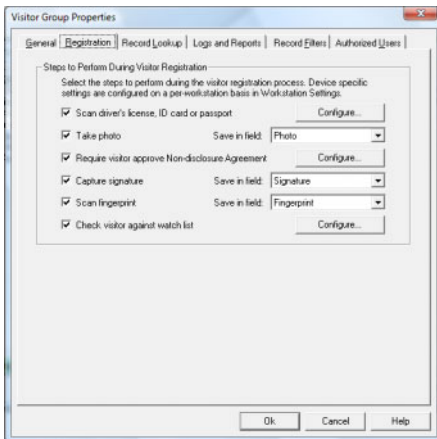
### Visitor Badges

Issuing badges is optional. To issue badges check the box, then design the badge with ID Flow. If a badge has already been designed with ID Flow it may be imported. ID Flow is the premier product for professional ID card design. Print paper badges or double-sided plastic cards. Magnetic stripe, barcode and other encoding functions are available. More information on ID Flow follows.



## Registration Tab

The *Registration* tab contains options available in the registration process. Registration must also be configured in the *Workstation Settings*. When these options are configured they become a step in the registration process. When they are not configured, they are either omitted from the registration process or that step becomes part of the general registration screen. To invoke the *Photo, Signature* and *Fingerprint* capture, map appropriate database fields.

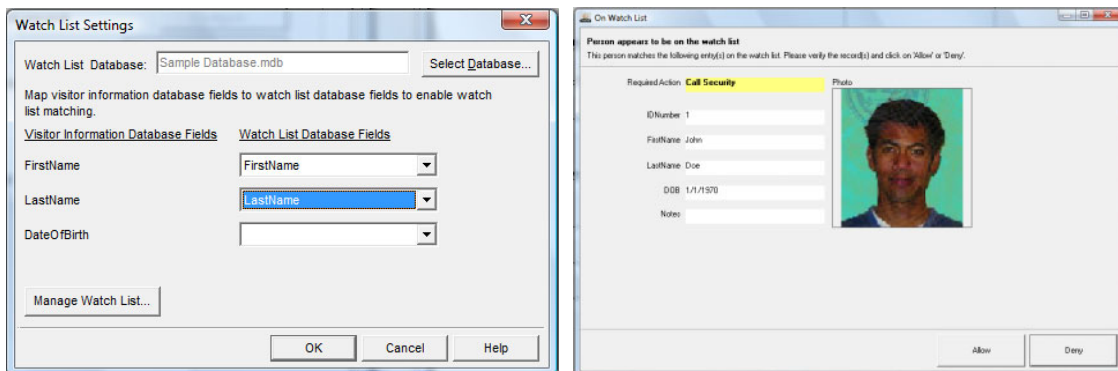


To scan an IDs click the *Configure* button and map the scanner fields to the database fields as appropriate.

*Note about driver's license, ID card or passport scan: Lobby Track utilizes Card Scanning Solutions scanning devices. In order to configure the scanner, the drivers must first be loaded. Drivers may be downloaded at: [www.jollytech.com/downloads/addon-modules](http://www.jollytech.com/downloads/addon-modules)*

## Watch List

The *Watch List* is typically used for looking out for dangerous or undesirable persons: Criminals, people with restraining orders, terminated employees, etc. To configure the *Watch List* check its box and click its *Configure* button.

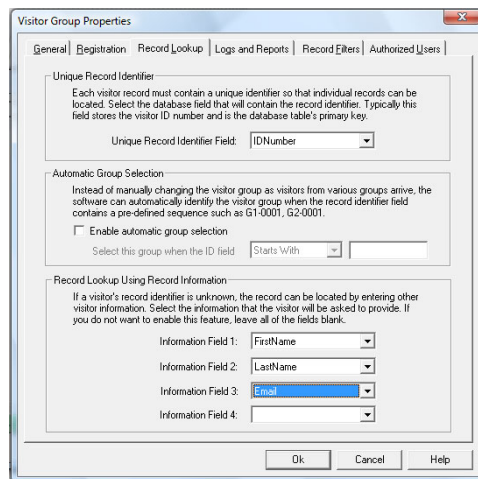


Click *Select Database* to point to its database. The *Sample Database* contains a sample watch list. Map the appropriate lookup fields to the database. To configure and add persons to the watch list click *Manage Watch List*. When persons with matching information registers their watch list record will appear.

*Watch List is an Enterprise Edition Feature.*

### Record Lookup Tab

The *Record Lookup* tab is used to define fields by which to lookup records. When no fields are mapped lookup is by ID number only. To present additional lookup fields, select the appropriate database fields in the *Information Field* selection boxes. An option to require exact match of all fields or partial matching is configured *Workstation Settings*.

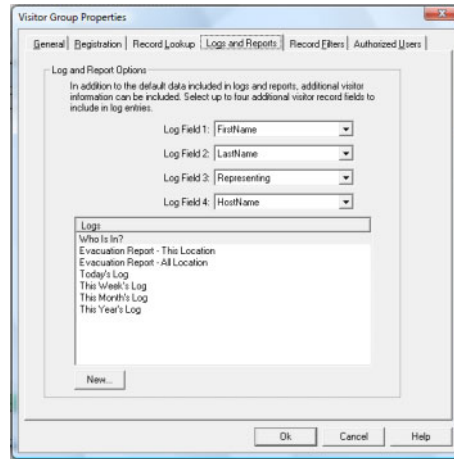


When more than one visitor group is used, the *Automatic Group Selection* may be invoked to automatically switch between groups when a visitor checks in/out with their badge. The ID numbers for the group need a consistent identifier.

### Logs and Reports Tab

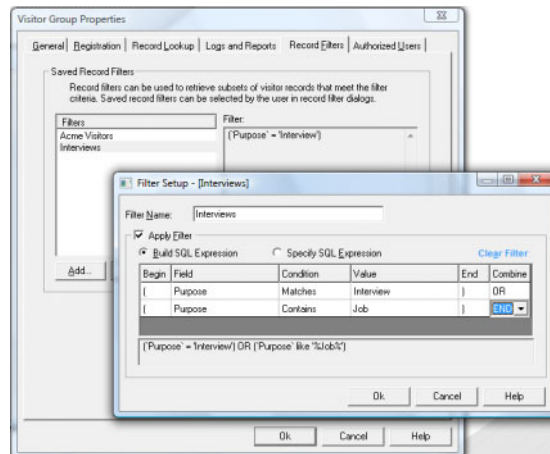
Data such as ID number, date, time, location, user, action, result and comments are automatically logged whenever an action occurs in Lobby Track. Users may define four additional fields from the database that may be logged as well. First and last name are the most obvious, though all four may vary.

Align the log fields with the appropriate database fields.



## Record Filters Tab

*Record Filters* allow a subset of records to be presented in the *Record Center* and during the check in process. Filters that are commonly used can be created in the *Record Filters* tab so that they may be quickly retrieved and re-used.

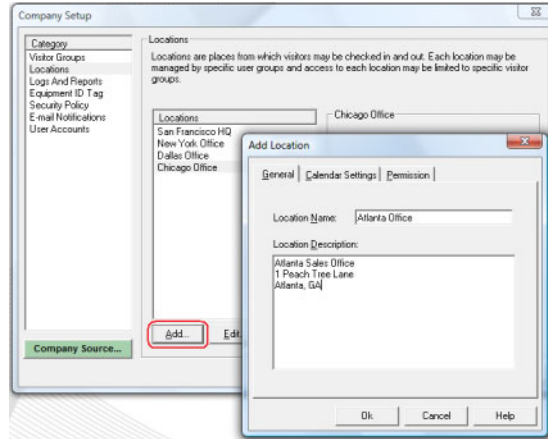


To create a new filter select *Add* and use the *Filter Setup* dialog to choose the field, condition and matching value. This form automatically generates an SQL statement which is shown beneath the selection criteria.

To use filters, select the filter button in the *Record Center*: .

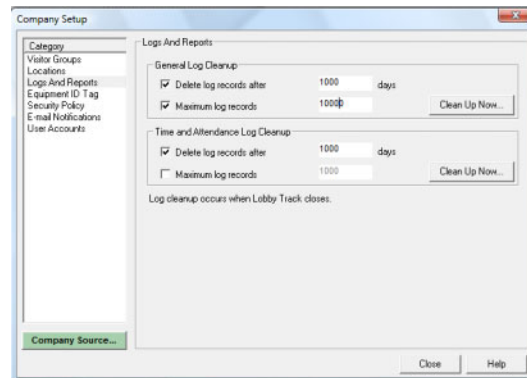
## Locations

To define locations, select the *Locations* category in the *Company Setup*. To add a new location select *Add...* and define the location. The locations are defined here. The location of a workstation is selected in *Workstation Settings*.



## Logs and Reports

The Logs and Reports category in the Company Setup is used to define how logs are cleaned up.



## Equipment ID Tag

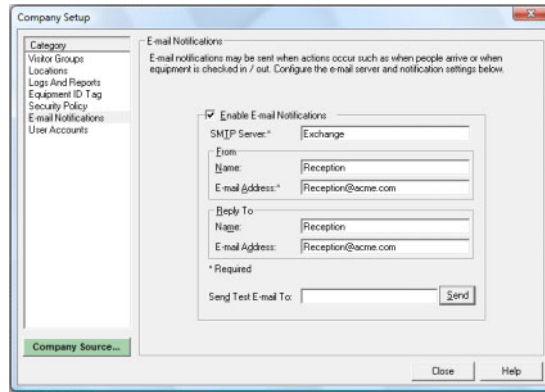
The *Equipment ID Tag* category is used to define the how equipment tag numbers are sequenced and generated. *Equipment Tracking is an Enterprise Edition feature*

## Security Policy

*Security Policy* applies to badges. Badges/ID cards can contain an overlay watermark to make them more secure and encrypted so that they cannot be reproduced anywhere but from an authorized user on this Lobby Track system. *Security Policy is an Enterprise Edition feature.*

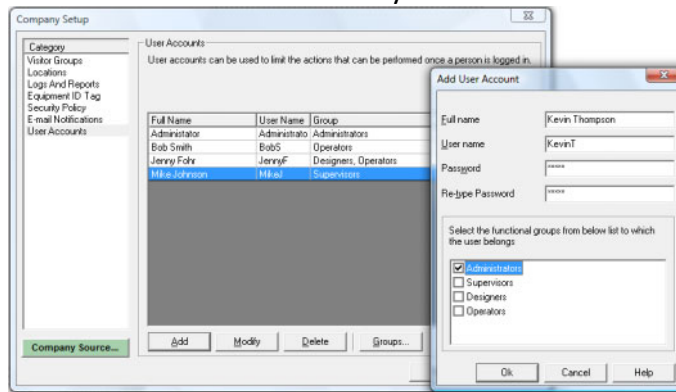
## Email Notifications

*Email Notifications* is used to define the server and account from which email notifications are sent. Email notifications may be sent to the host when a visitor checks in or when alerts are triggered. *Email Notifications is an Enterprise Edition feature.*

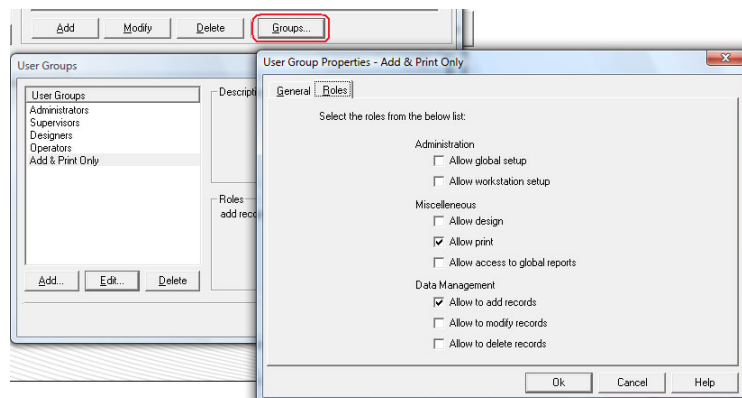


## User Accounts

*User Accounts* define users allowed to use Lobby Track. To add a new user select *Add...*

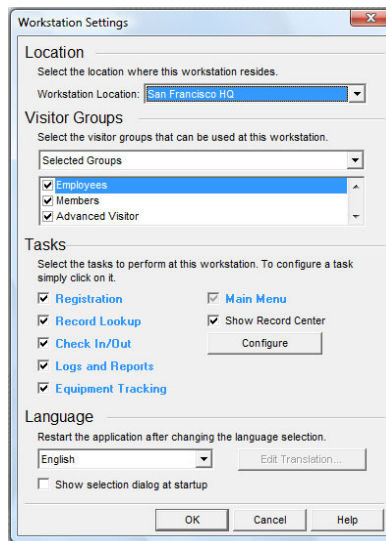


Users belong to a *User Group*. Four user groups are pre-defined: *Administrators*, *Supervisors*, *Designers* and *Operators*. Additional user groups may be defined:



## Workstation Settings

*Workstation Settings* apply to the specific workstation. They include selecting the location, *Visitor Groups* available at this location, selecting which tasks will be available to the user, configuring the tasks and capture devices, and selecting the language to be used at this location. Tasks are configured individually through the task's blue hyperlink or together via the *Configure* button.



### Location

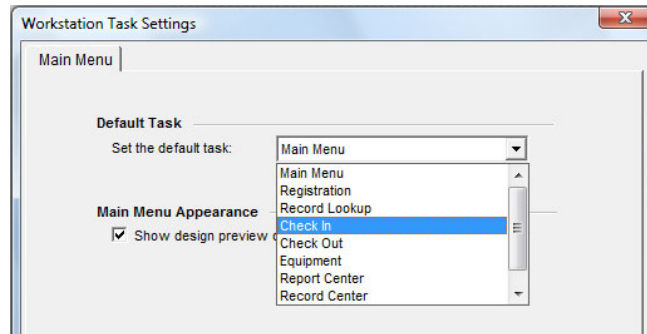
Select the location that this workstation resides at, such as Main Office. Locations can be configured in Global Settings.

### Tasks

Configure the tasks to be performed on this workstation.

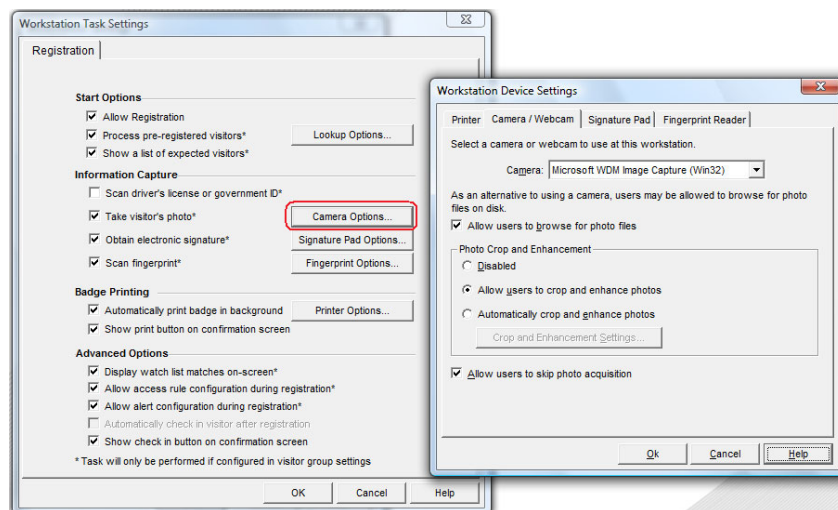
### Main Menu

Any of the Lobby Track tasks may be set as the default screen that the program will return to when a task is completed. For frequent swiped check-ins make the default the *Check in* screen. The *Main Menu* may be accessed from any task by selecting the *Main Menu* button. By default Lobby Track shows a preview of the card design for the current visitor group in the *Main Menu*. That may be disabled here.



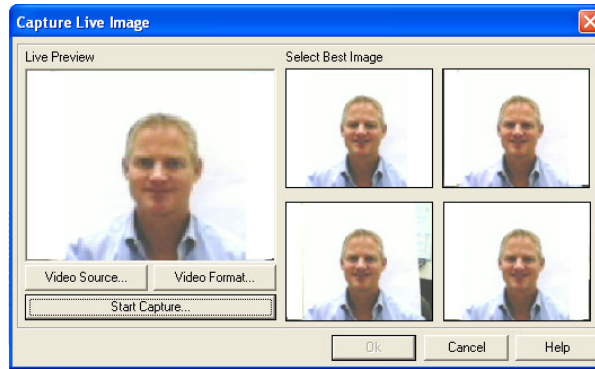
## Registration

The registration process for *this* workstation is defined on the *Registration* tab. To invoke an activity, click the check box. *Options* buttons provide more configuration of the selected item. Capture devices may be pre-defined so that they do not have to be selected at the time of capture.



## Notes about capture devices

*ID Flow supports TWAIN and WIA compatible cameras. The ability to capture a photo from within ID Flow and trigger the flash will depend upon the camera's software. ID Flow is commonly used with web cams: When Microsoft WDM is invoked as the capture source, four photos are captured and the best may be chosen.*



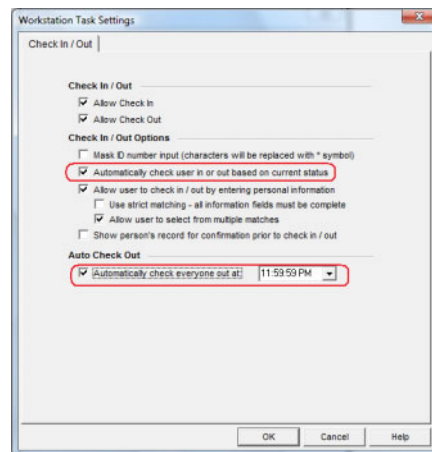
*ID Flow supports Topaz and Interlink USB signature and fingerprint pads.*

*ID Flow support Card Scanning Solutions ScanShell 800, ScanShell 1000 and SnapShell camera for driver's license and/or passport scanning. It does NOT support the 800N.*

*Some device files and drivers may be found under "add-on modules" on the "Download" section of the [www.jollytech.com](http://www.jollytech.com) website.*

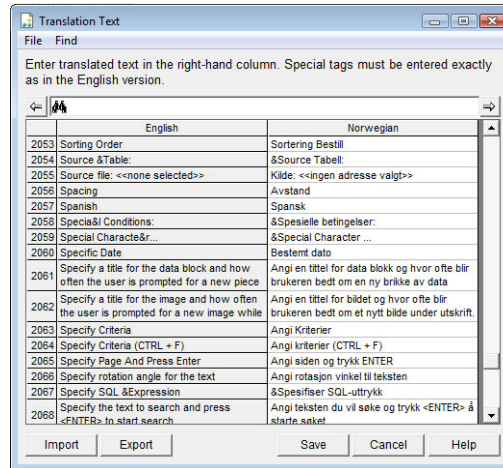
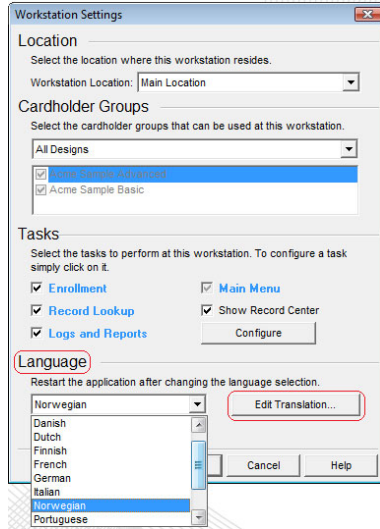
## Check in/out

Providing a check in and/or out screen, like all tasks, is optional. Many organizations check people in, but do not require a check out: In this instance it is recommended that everyone be automatically checked out at a certain time of day. For organizations that require a check out, Lobby Track may be set to automatically check in or out based on the visitor's current status: If they are checked in it will check them out and visa versa.



## Language

Lobby Track is available in 10+ languages. A translation table allows the user to make changes to the translation or to translate into a language not yet provided by Jolly. After changing languages, restart the program.

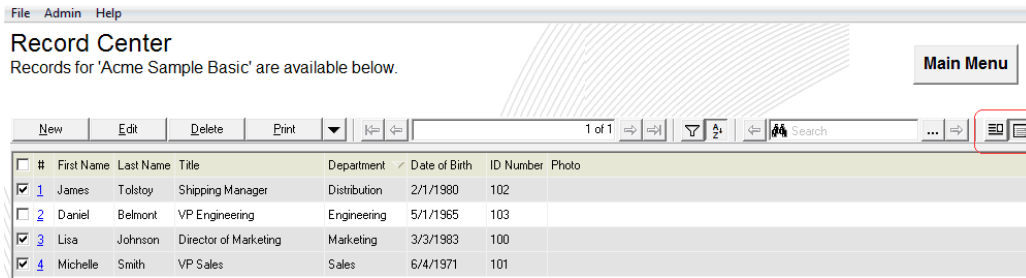


## Record Center

*Record Center* is used for the management of records. Records may be added, edited, deleted, printed and duplicated from this screen. The down-arrow button provides additional options.

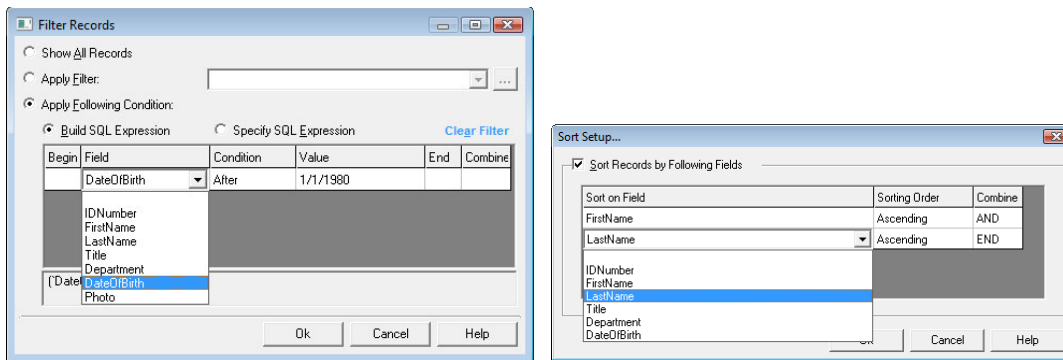


Records may be viewed in single-record or spreadsheet view by selecting the buttons on the right of the toolbar.



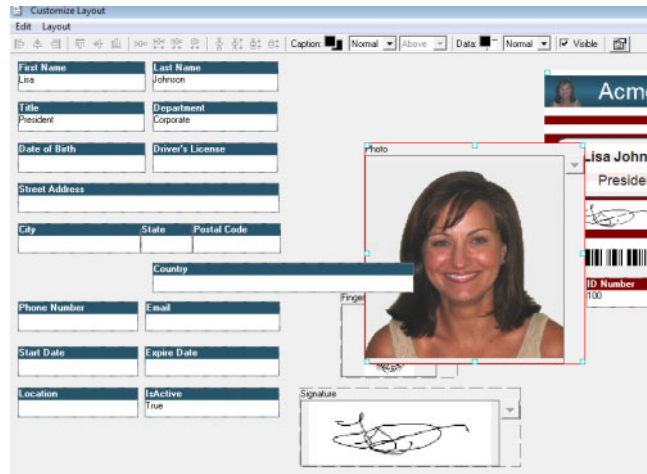
Records may be batch printed, deleted and edited by checking the box to the left of the record and selecting the appropriate action. Records may be sorted by clicking on column headers.

The toolbar contains *filter* and *sort* buttons . Filters are used to create data subsets. Sorting allows for multiple field sort criteria.



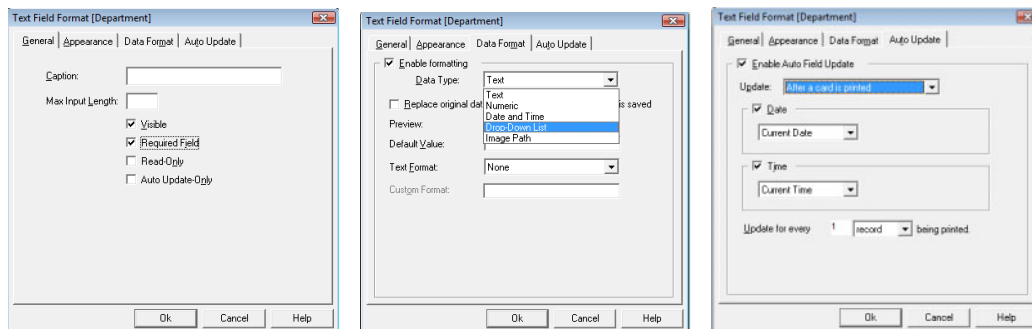
## Configuring the Record Screen

*Lobby Track Enterprise* and *Corporate Editions* have drag-and-drop record screen formatting. Select *Edit Record Layout* from the down-arrow menu on the *Record Screen*: Size and move fields with the mouse. Caption placement, colors and alignment tools are provided on the menu bar.



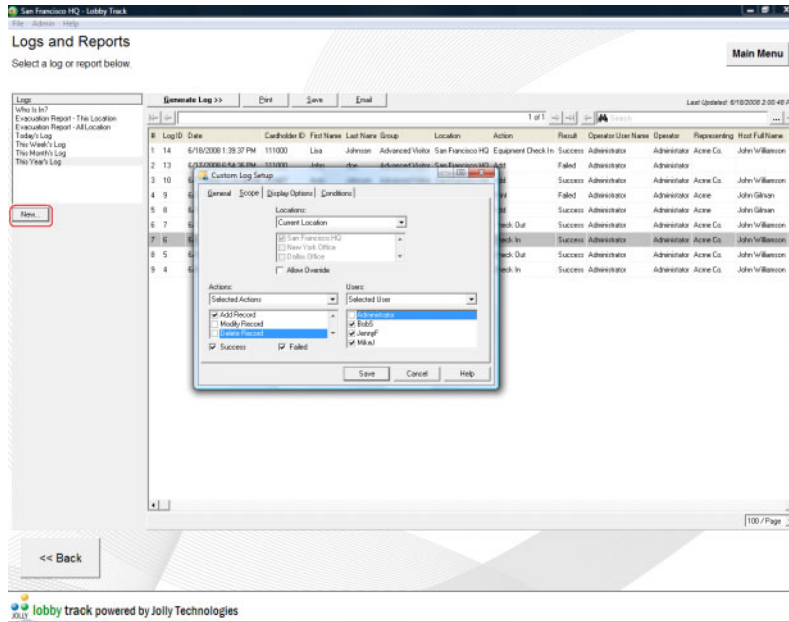
## Advanced Field Formatting

Lobby Track Enterprise Edition contains advanced field formatting. To configure a field, double-click on the field while in *Edit Record Layout*. Fields may be made *Visible*, *Required* and *Read Only*. They may be given default values. Drop-down lists may be created. Text can be set to Capitalize, UPPER CASE or lower case. Image paths may be created to store variable images to file. Fields can automatically update after a card is printed.



## Logs and Reports

Lobby Track contains seven built-in reports. Custom reports can be added (*in the Corporate and Enterprise Editions*) by selecting *New* and configuring the *Custom Log Setup*.



Reports may be printed, saved to a file or emailed.

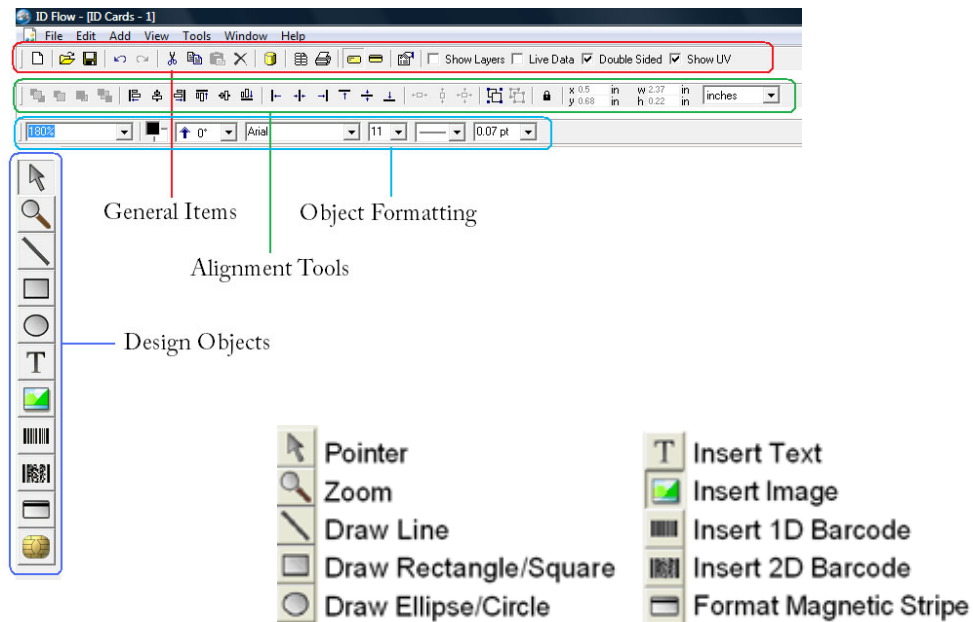
The *Evacuation Report* lists all visitors in all visitor groups that are checked in at the current location. This report is available by selecting the button at the bottom of every page.

## ID Flow Card Designer

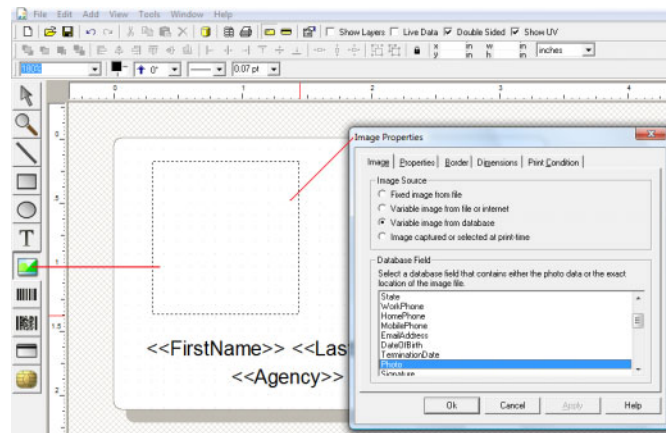
Lobby Track contains an integrated version of Jolly Technologies leading ID card product: ID Flow for the design of sophisticated ID cards and badges.

### Design Screen

The design screen contains four toolbars: general items, alignment tools, design objects and object formatting.



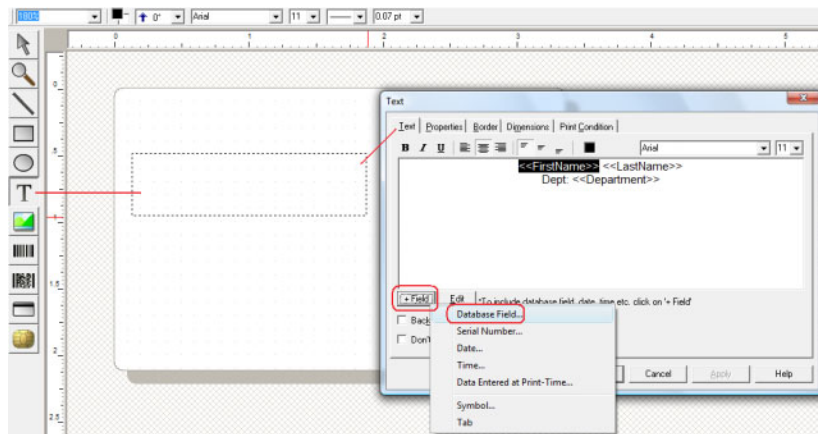
Cards are designed by selecting the design object on the left-hand toolbar and by drawing that object's area on the card with the mouse. After the area drawn the object's *Properties* dialog will appear. Click through the tabs to format the object.



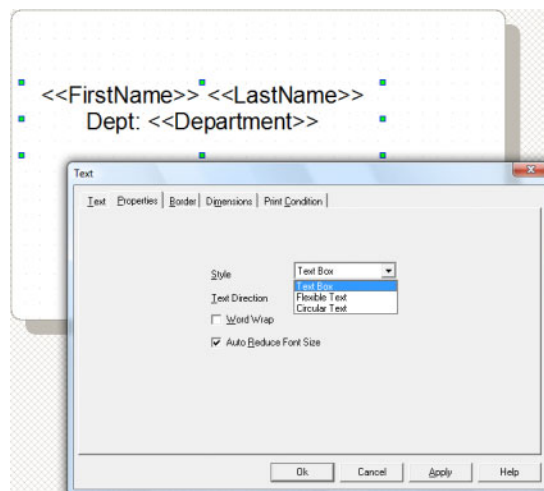
Objects may be resized at any time and *Properties* dialog re-accessed by double-click.

## Working with Text

ID Flow contains rich text editing. Regular text, database text, serial number, date and time may be combined within one text box. Type with a keyboard or use the *+ Field* button for text selections.



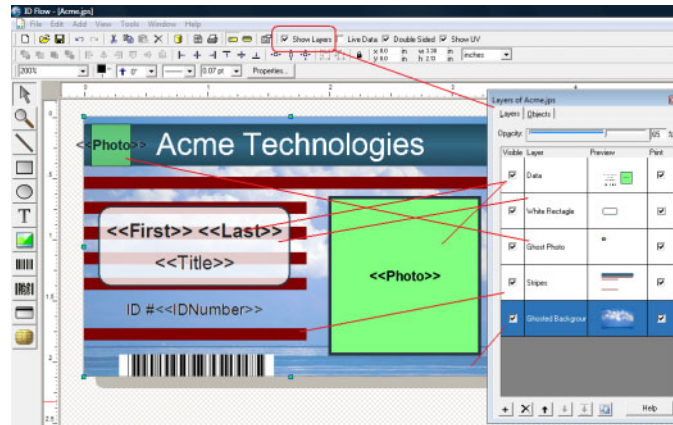
There are three types of text formatting: Text Box, Flexible Text and Circular Text. *Text Box* will always place text within the bounds of the box drawn in the design: If larger, it will auto-reduce in font size or word wrap. *Flexible Text* will maintain font size regardless of the size of the box drawn. *Circular Text* formats text in a circle.



## Working with Layers

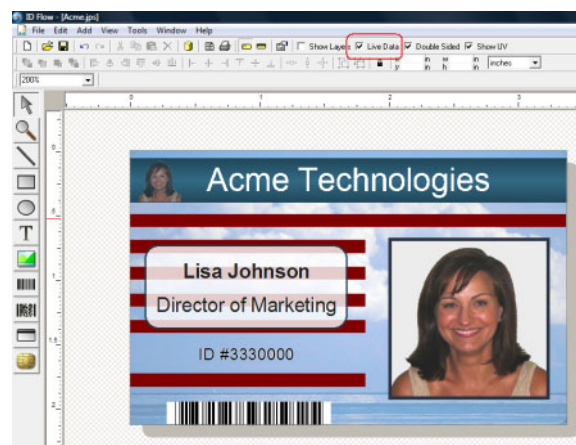
Like other quality graphical design tools, ID Flow uses a layered design approach. Layers may contain different design objects of varying opacity. Using layers adds a rich depth to design and creates highly secure cards.

To see the layers window click the *Show Layers* checkbox on the top menu bar. Layers are added using the [+] button at the bottom of the window. Use the arrow buttons to move layers above and below other layers. Click the *Print* checkbox on each layer to format its print condition. The active design layer is highlighted blue.



## Viewing Designs with Live Data

At anytime the card design may be viewed with data by checking the *Live Data* button on the top menu bar:

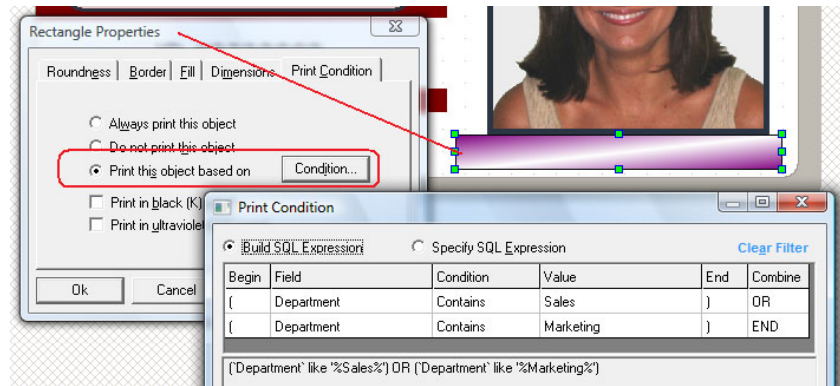


To view the full record set: go to *File -> Database Setup* or click the data icon on the top menu bar:



## Working with Print Conditions

Design objects or design layers may be set to print only if specific database conditions are met. Print conditions are set on the *Print Conditions* tab of the object's properties dialog. K Panel (Black Panel) and UV Panel are also set on this tab.

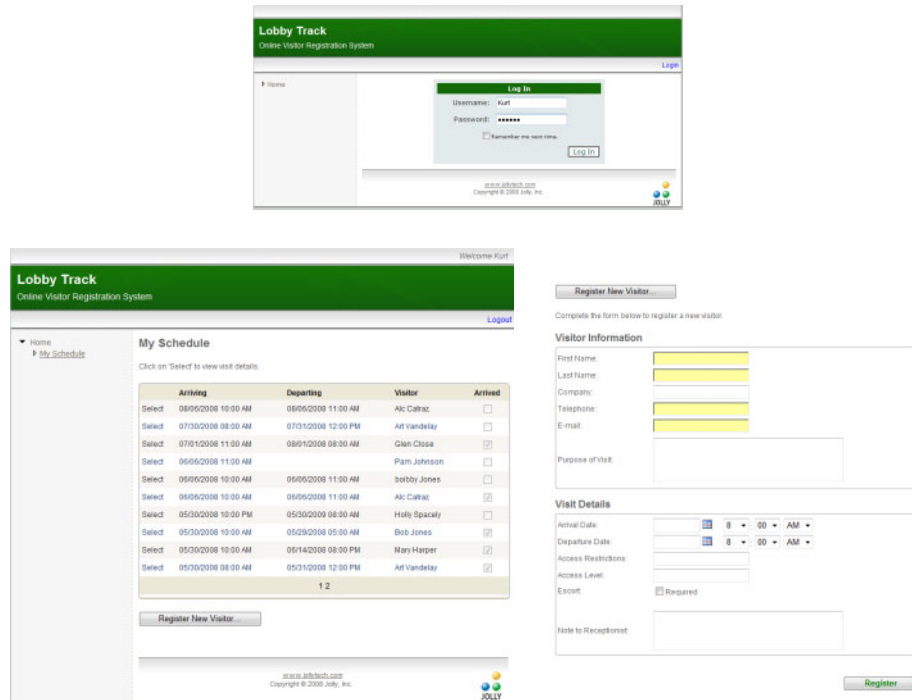


## Saving a File

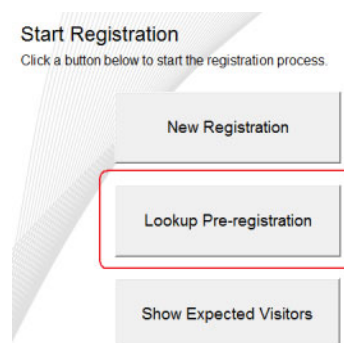
Use *File -> Save* or *Save as...* to save and name the design. ID Flow files are saved with a .jps extension. Though cards can be printed from the design screen or *Database Setup*, design files are typically imported into the *Card Issue Center* for production.

## Lobby Track Online Visitor Registration System

Lobby Track Online Visitor Registration System is a client-hosted (intranet) website that allows employees to register their visitors in advance of arrival. This is an add-on license that runs with Lobby Track Enterprise Edition.



Pre-registered visitors check in via the *Lookup Pre-registration* button found in the *Registration* process.



### Lobby Track Online System Requirements

Windows XP, Server 2003, Vista or Server 2008

IIS 6.0/7.0

ASP .NET 3.5



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**IDZONE**

**www.IDZone.com**  
**(800) 910-5987**

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