

Jolly Presents...

# Lobby Track Getting Started Guide

*An Introduction to Lobby Track*

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## Introducing Lobby Track

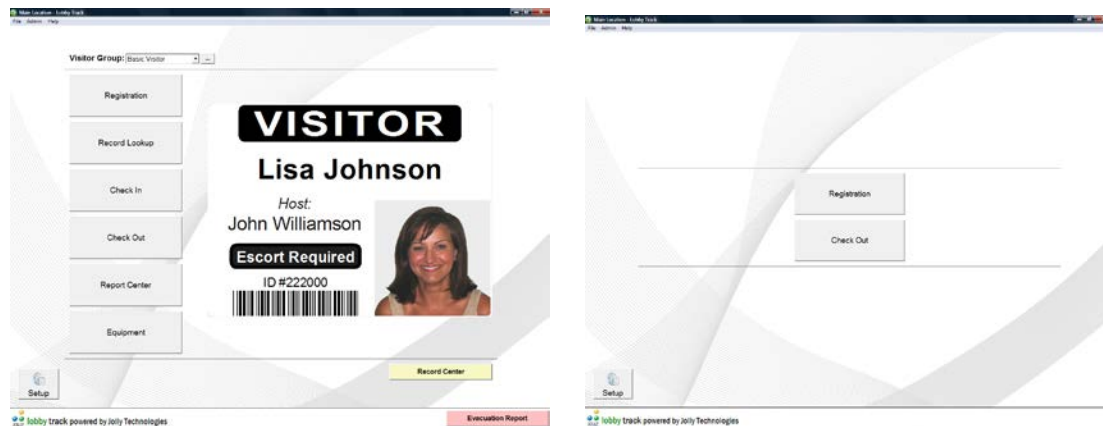
Lobby Track is a software tool designed for verifying, tracking and enforcing access policy for visitors passing through lobbies or other gateways.

Lobby Track is flexible: It may be tailored for any type of facility and any group of people. 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.

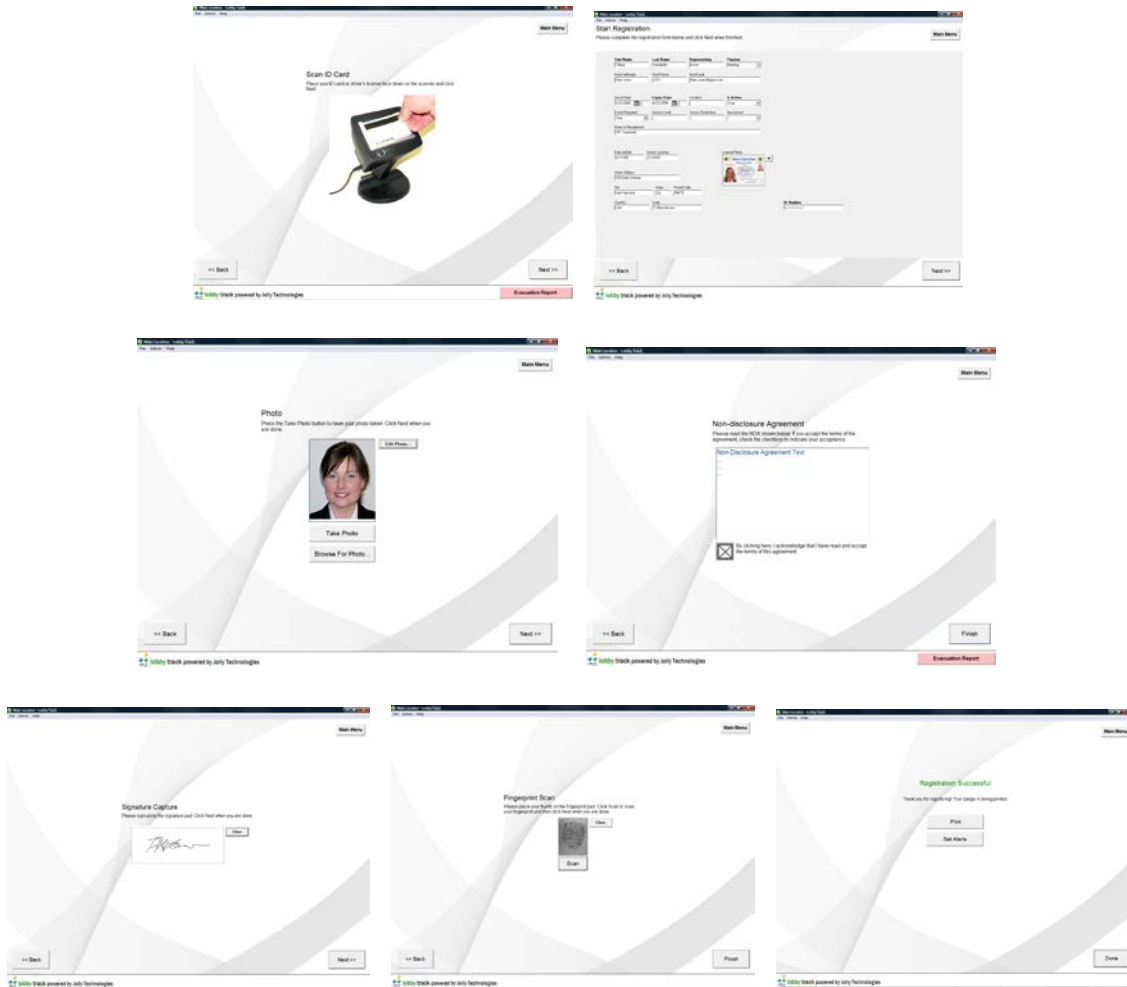
*This guide provides a general overview of product components and instructions on getting started. This guide is a supplement to the Help system provided within the product. The integrated Help system provides comprehensive configuration details.*

## Overview

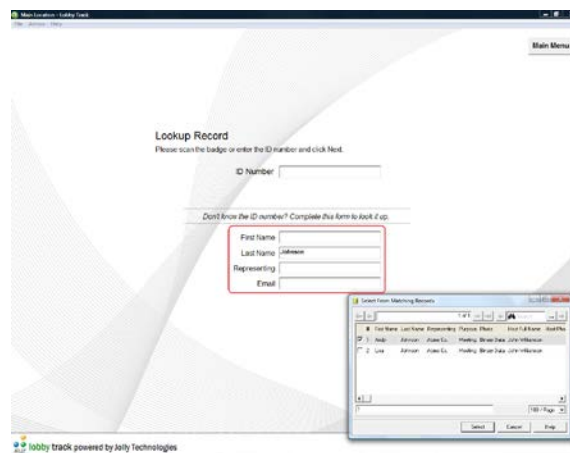
Lobby Track is menu driven: It presents directed tasks that make the reception process easy. The *Main Menu* presents buttons that identify the regular tasks. Lobby Track is extremely customizable: Available tasks and data to be collected are easily definable.



Define the steps of *your* registration process. The *Registration* process can incorporate driver's license/business card/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	Tolstoy	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

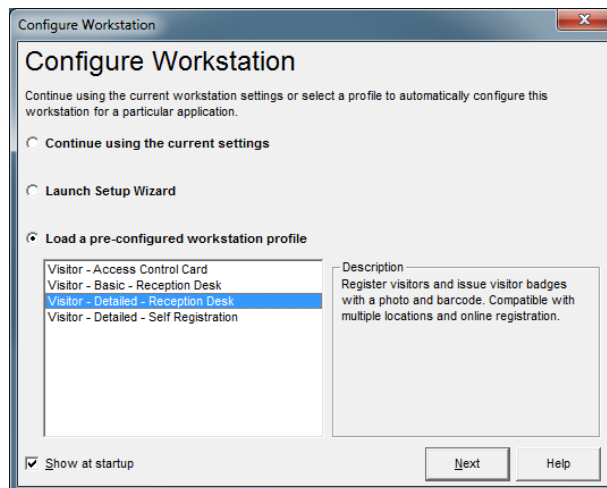
  

#	FirstName	LastName	DateIn	TimeIn	DateOut	TimeOut	HoursWorked	AccumulatedHours
1	Patrick	Combs	8/30/2007	6:51:43 PM	8/30/2007	9:07:29 PM	2.267	2.267
2	Carlos	Diaz	8/30/2007	5:10:48 PM	8/30/2007	9:07:48 PM	3.95	3.95
3	Lisa	Johnson	8/30/2007	5:10:34 PM	8/30/2007	6:51:18 PM	1.683	1.683
4	Lisa	Johnson	8/30/2007	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

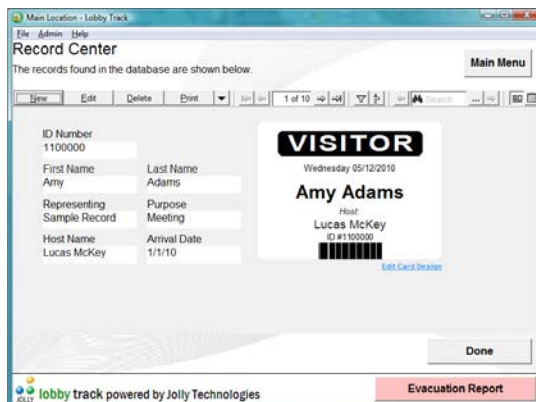
# A Quick Start

## Quick Start Option 1

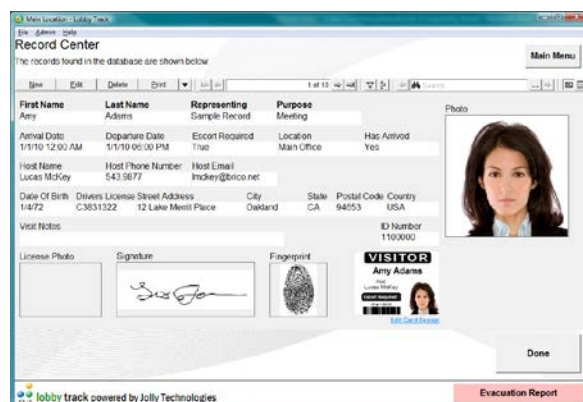
Lobby Track is preconfigured with *Workstation Profiles*. These profiles allow users to select an application that resembles their intended use. There are different profiles for reception desk, self-registration and check-in stations. Profiles are configured with sample badge designs, menu options and registration processes that are appropriate for the application.



Behind each profile is a Visitor Group(s) that contains its database, badge design and settings.



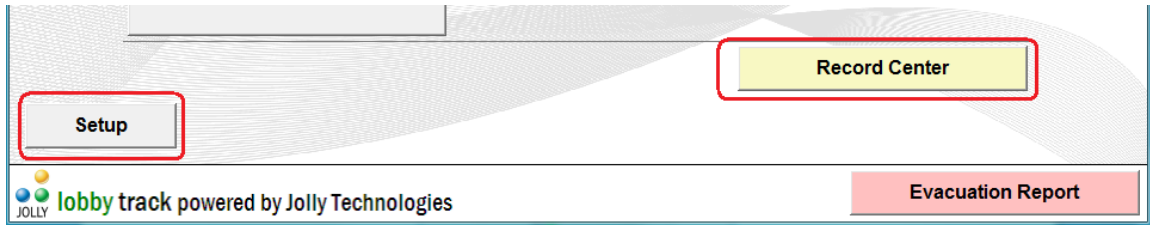
Basic Visitor Group



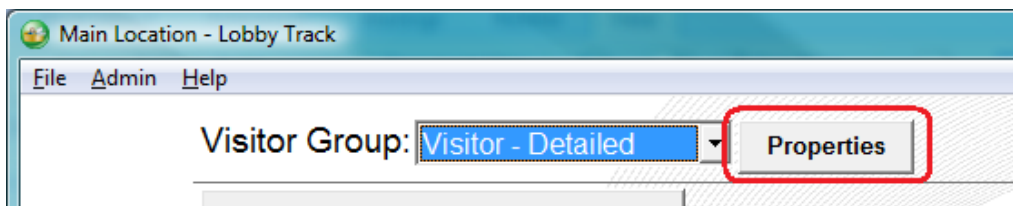
Detailed Visitor Group

## Getting to Configuration

Configuration is done through the *Setup* button on the *Main Menu*. After clicking *Setup* you may choose to configure *Jolly Server* or *Workstation Options and Devices*. The *Record Center* button takes you to the database view of all records.

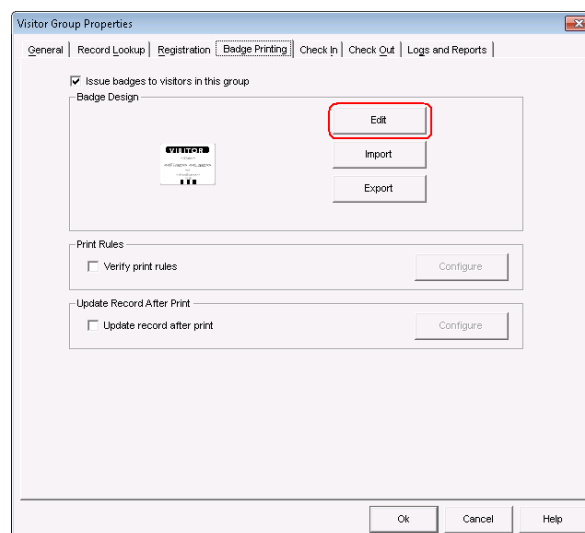


There is a shortcut to the selected visitor group's properties dialog next to the group selection dialog.

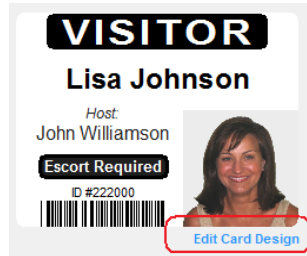


## Changing Badge Design

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

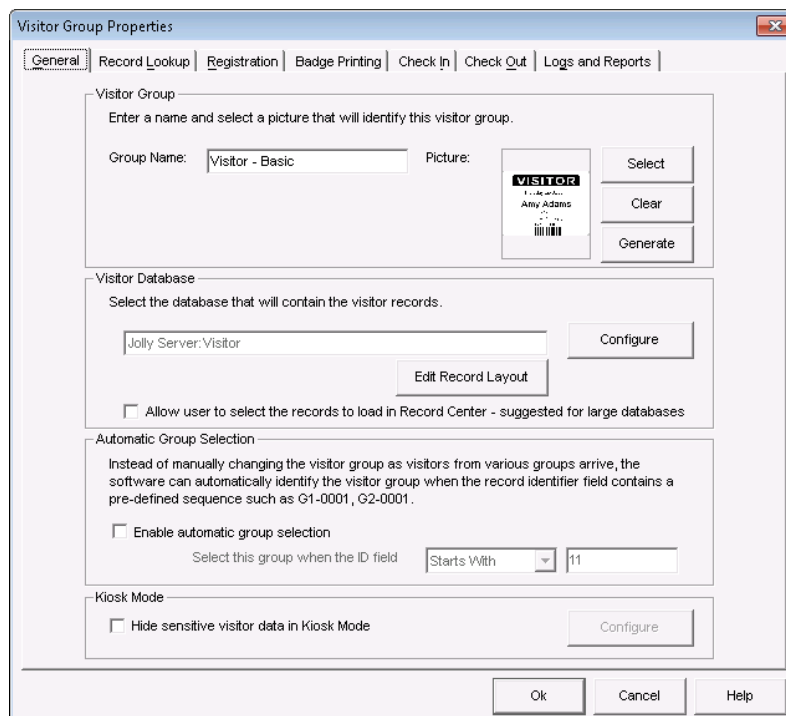


There is a shortcut in *Record Center* that will also launch *ID Flow Designer*:



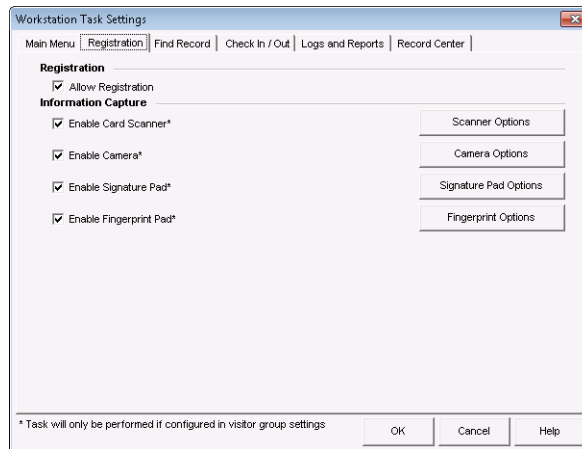
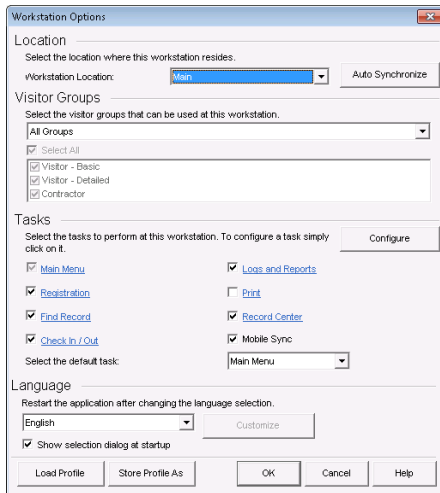
## Quick Start Configuration

To globally define the registration process, lookup fields, entry/exit policy) and report fields go to the *Visitor Group Properties* dialog in *Jolly Server Settings*. Go through each tab to change configuration.



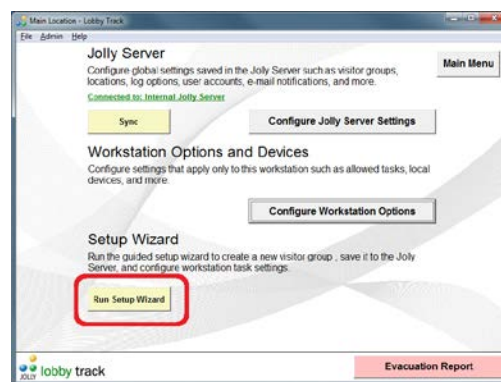
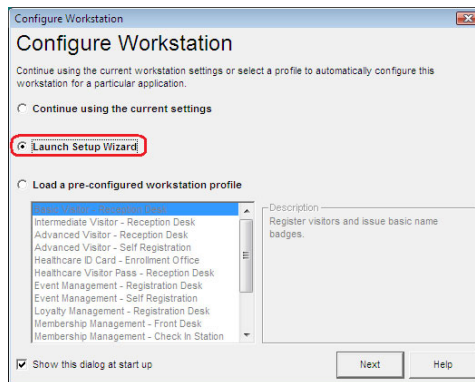
What tasks are shown on the *Main Menu* screen, registration processes, check in/out settings and capture devices are set in the *Workstation Options*. Click on the blue hyperlink to configure the individual tasks or click the *Configure* button to configure them all at once.



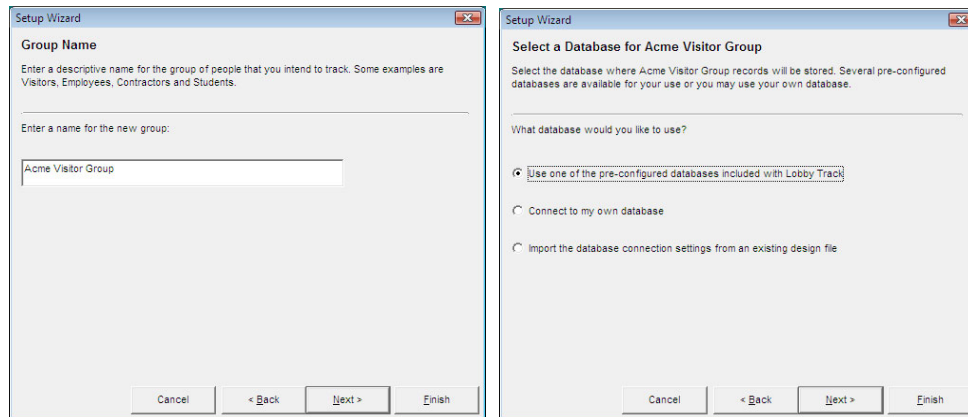


## Quick Start Option 2

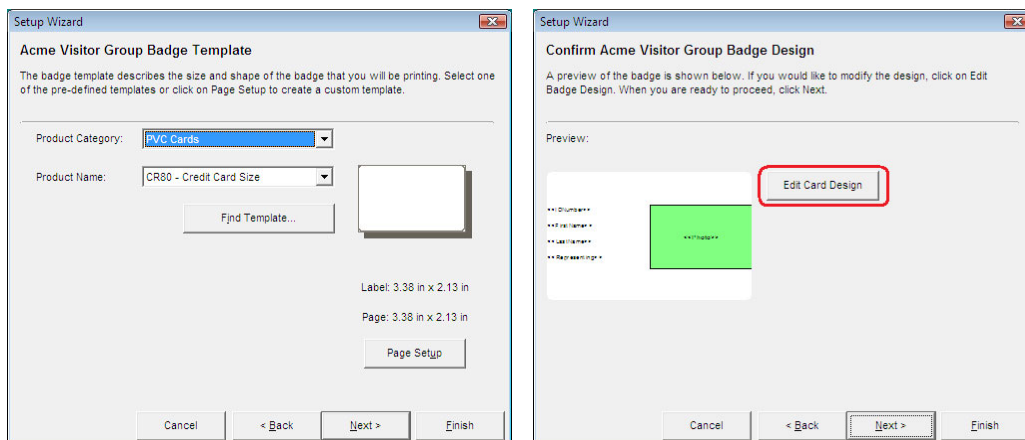
Select *“Launch Setup Wizard”* from the *Configure Workstation* dialog at start up or run from the *Setup* menu.



Name the visitor group; then choose the database:



Choose the badge type; then design the badge:



When the badge design is complete; exit and save.

Go through each tab on the *Visitor Group Properties* dialog and *Workstation Options* dialog to configure – click *OK* when finished with each dialog.

Click *Finish* on the *Setup Complete* dialog and the initial set-up is done.

Go to *Jolly Server Settings* to add user groups, add users, add locations and to network multiple copies.

## Jolly Server Settings

Lobby Track is designed to run across multiple locations in a networked environment. Shared settings such as visitor groups and log data are stored on the Jolly Server while workstation specific options are configured in Workstation Options and Devices.

If Lobby Track will be used in a standalone environment where it does not need to share data with other workstations, it can use the Internal Jolly Server, installed as part of Lobby Track.

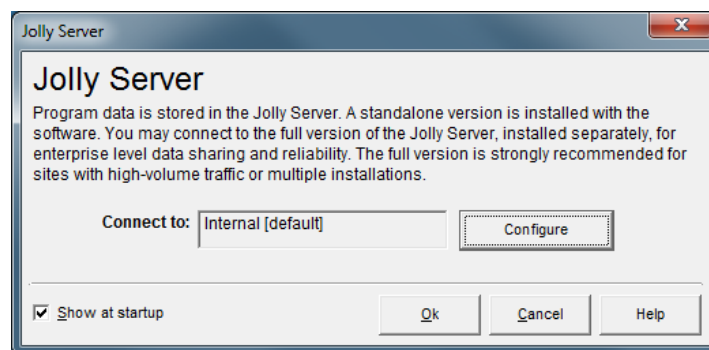
## Installing Jolly Server

Jolly Server is installed separately from Lobby Track. To install, run the Jolly Server installer that was provided to you when you purchased the software on the target server or workstation.

## Connecting to a shared Jolly Server – Networking Multiple Copies

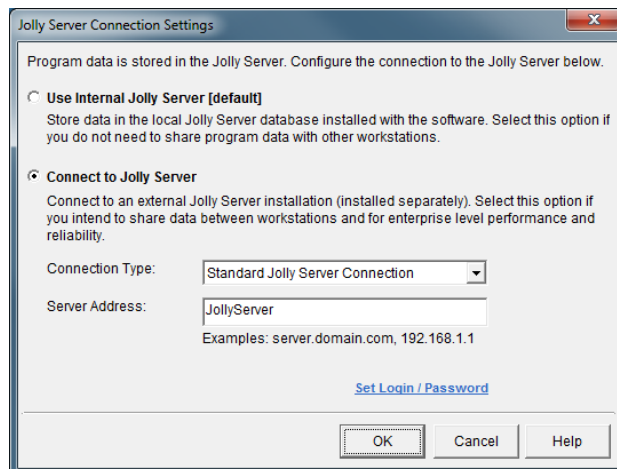
When networking multiple copies of Lobby Track, install the Jolly Server on a central server or shared workstation. All networked copies should point to the same Jolly Server.

To connect to a *Jolly Server*, select *File > Connect to Jolly Server*.



By default, the *Internal Jolly Server* is selected. When Internal Jolly Server is selected, the software will operate in standalone mode.

To connect to a shared *Jolly Server*, click the *Configure* button.

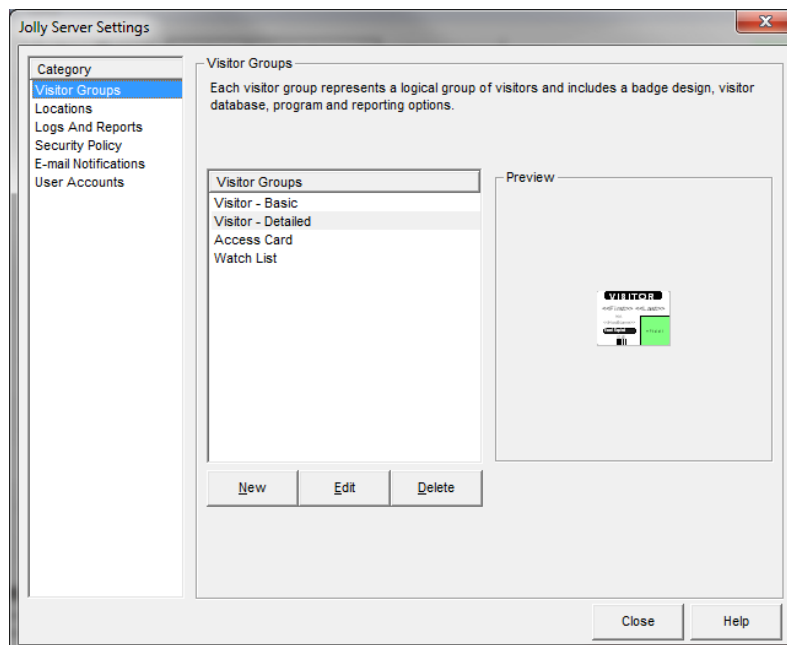


Enter the name of the server or workstation where Jolly Server was installed.

## 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 Jolly Server Settings is first opened. To add a new visitor group select *New*, to edit an existing group select *Edit*. Either selection will open the Visitor Groups Properties tab.



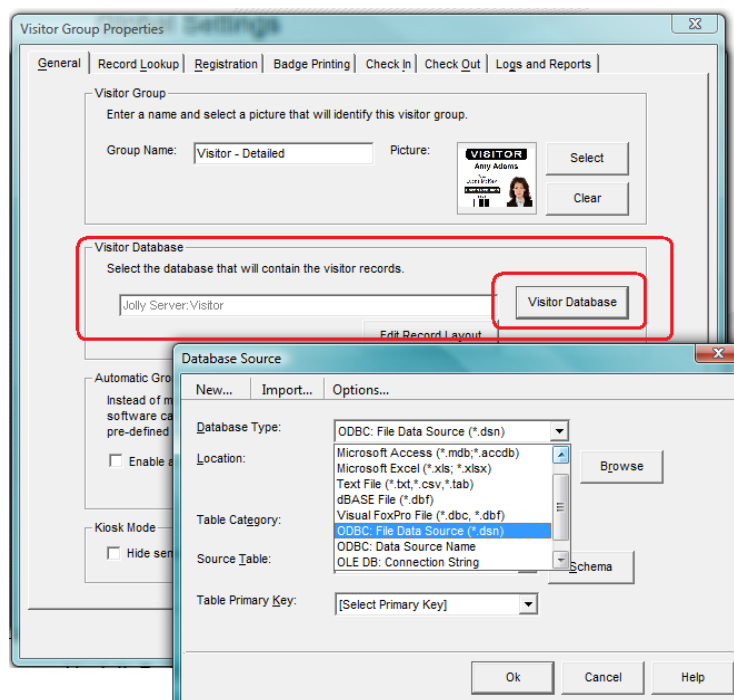
## General Tab

This tab contains critical information for the Visitor Groups database. Give the group a name. Optionally select an image to represent the group on the Main Menu. Click *Select* to add your image or *Generate* to generate an image using the badge design.

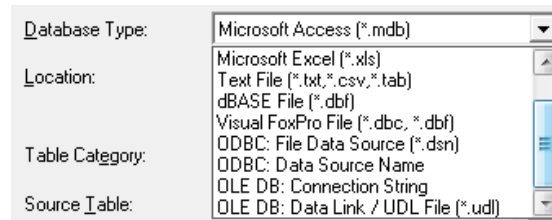


## Visitor Database

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



Included in the Jolly Server are tables that contain basics for Visitors and a Watch List. To connect to an existing database, select database type then point to the database source.

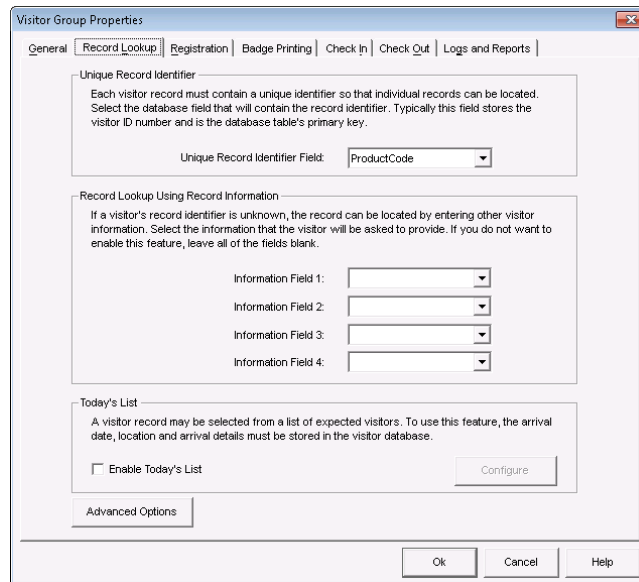


*Important Note: Databases must contain certain fields for certain operations within Lobby Track to function. The name of these fields is not important, that they exist is.*

Field	Type	Required for
IDNumber	Number/Autonomous	Locating record
Location	Text	Showing expected arrivals at this location
ArrivalDate	Date	Showing arrivals today
ExpireDate	Date	Denying access when expired
ArrivalStatus	Text	Showing if and when a visitor has arrived
HostName	Text	Looking up host from LDAP or host database
HostEmail	Text	E-mailing host of visitor arrival
IsActive	Boolean	Denying access when not active
Photo	Image	Capturing a headshot
Signature	Image	Capturing a signature
Fingerprint	Image	Capturing a fingerprint

### Record Lookup Tab

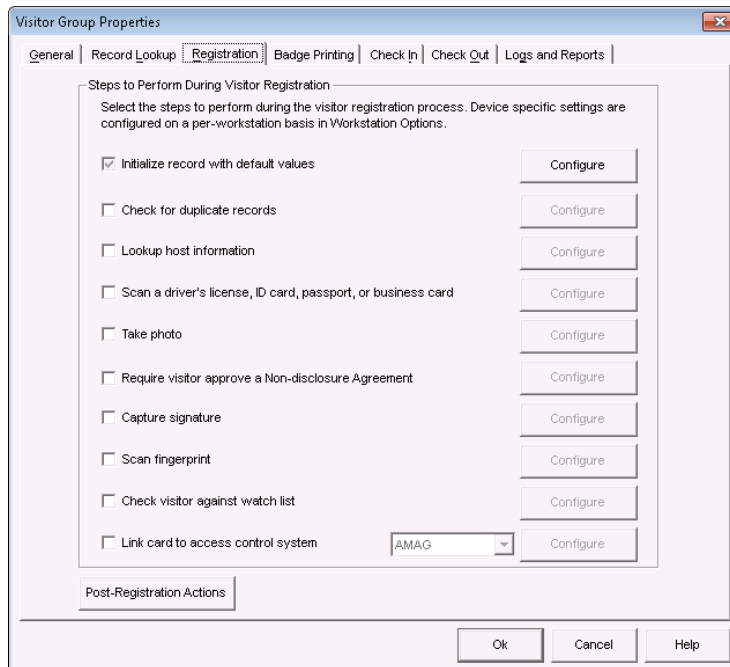
The *Record Lookup* tab is used to define fields by which to lookup records. **Lobby Track requires a unique record identifier. This is typically an autonumber field in the database.** Other fields for finding records may be selected. When no fields are mapped lookup is by the unique record identifier 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 in the *Advanced Options*.



Enable and configure the *Today's List* to make a list of expected visitors available on the record look up screen. The Expected visitor list requires the database to have *Location*, *ArrivalStatus* and *ArrivalDate* fields.

### Registration Tab

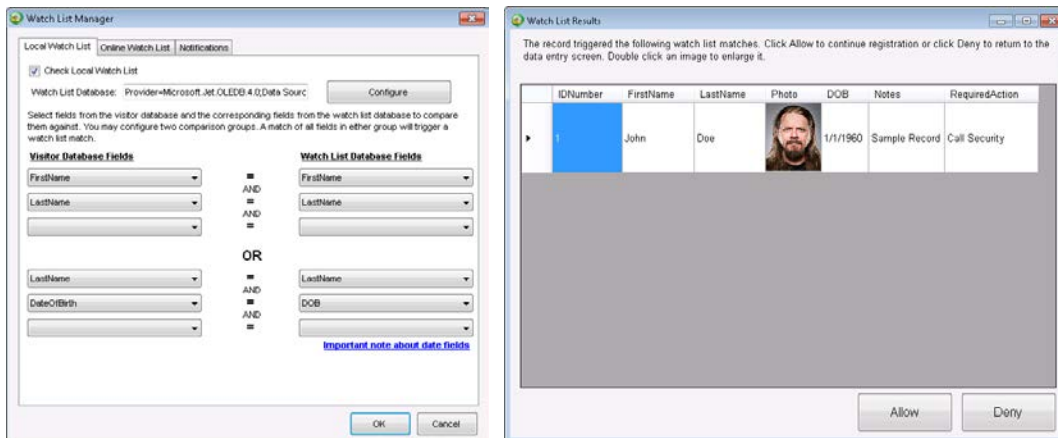
The *Registration* tab contains options available in the registration process. Registration must also be configured in the *Workstation Options*. When these options are configured they become a step in the registration process. When they are not configured, they are either omitted from the registration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



*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.

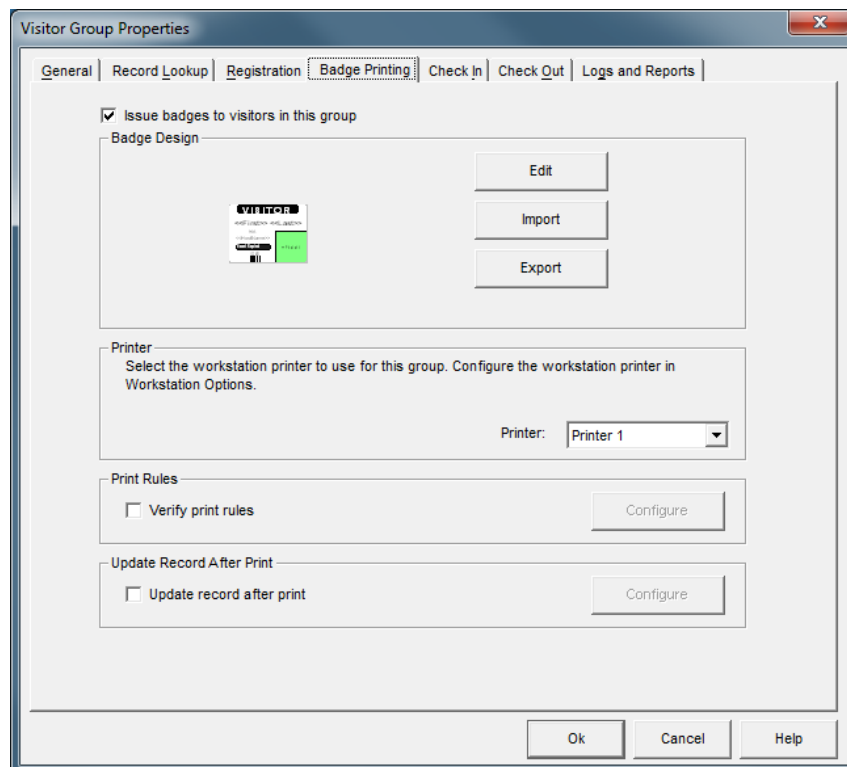




Click *Select Database* to point to its database. The *Jolly Server* contains a sample watch list. Map the appropriate lookup fields to the database. To configure and add persons to the watch list click *Manage Watch List*. When persons with matching information registers their watch list record will appear. An option to connect to an online watch list containing U.S. sex offenders is now available and is configured on the online watch list tab. Contact Jolly or your local dealer for subscription information.

### Badge Printing Tab

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.

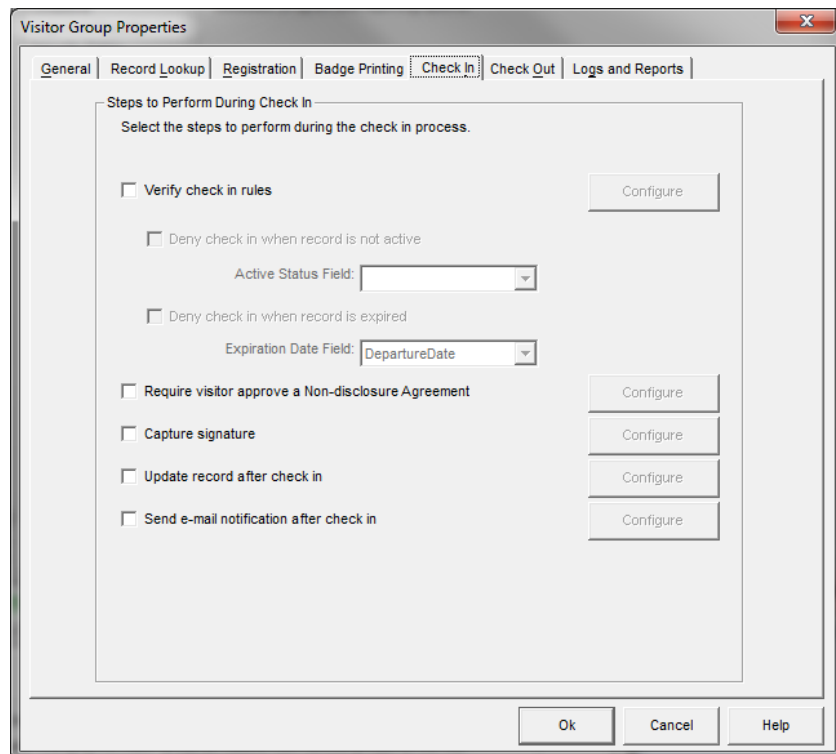


Note: New to 6.0 is the ability to remember the last used printer by a Visitor Group for a particular workstation. This allows Lobby Track to print to different printers for different visitor groups at a workstation, as well as allowing for different printers at different workstations. In *Workstation Options*, you can select the default local printer.

Database fields may be updated after printing by configuring the *Update record after Print* dialog. You may set print rules to be verified before a badge will print. *These are Premier Edition features.*

### Check In and Check Out Tabs

The *Check In and Check Out* tabs are used to define access policy and gather additional information during the check in/out. You may deny access when a record is set to not active, when the termination date has passed, based on a number of visits, by time and location and other policy that you choose to define. Relevant database fields are required for these items.

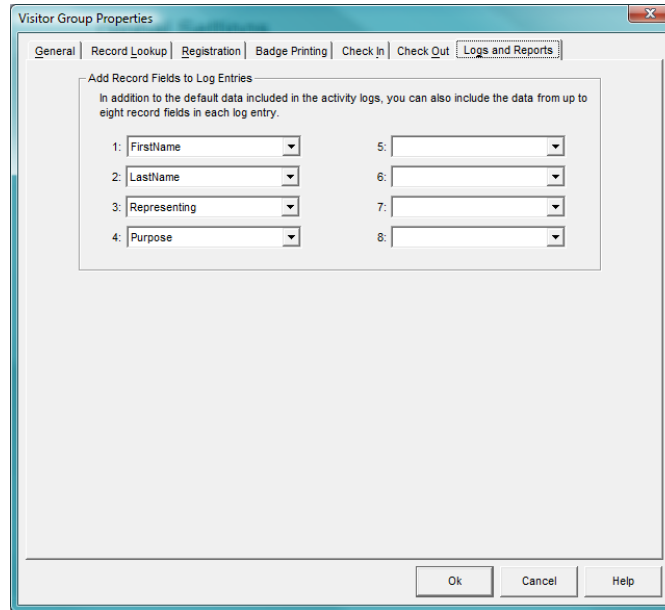


On these tabs you may update fields after entry and exit: For example, a database field may be set to "Currently In" after check-in and "Currently Out" after check-out. Alerts that display messages on the screen at check in when specific conditions are met are configured here.

### Logs and Reports Tab

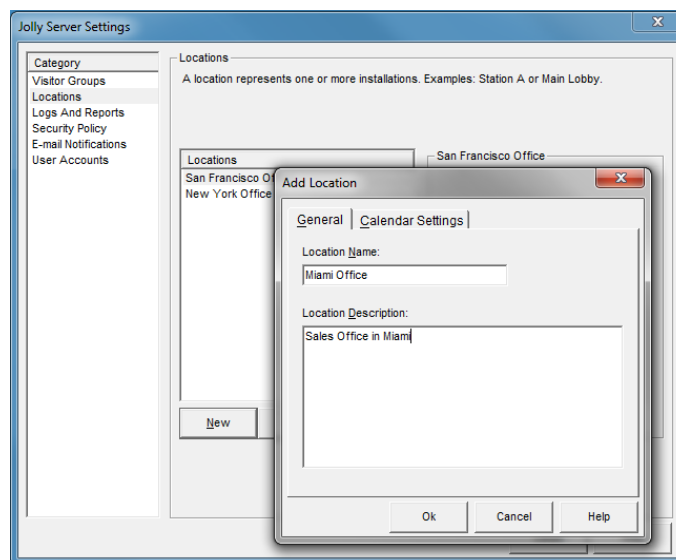
Data such as ID number, date, time, location, user, action, result and comments are automatically logged whenever an action occurs in Lobby Track. Users may define four additional fields from the database that may be logged as well. First and last name are the most obvious, though all four may vary.

Align the log fields with the appropriate database fields.



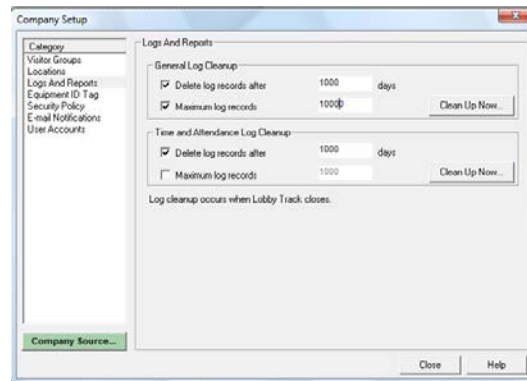
## Locations

To define locations, select the *Locations* category in the *Jolly Server Settings*. To add a new location click *New* and define the location. The locations are defined here. The location of a workstation is selected in *Workstation Options*.



## Logs and Reports

The Logs and Reports category in the Jolly Server Settings is used to define how logs are cleaned up.

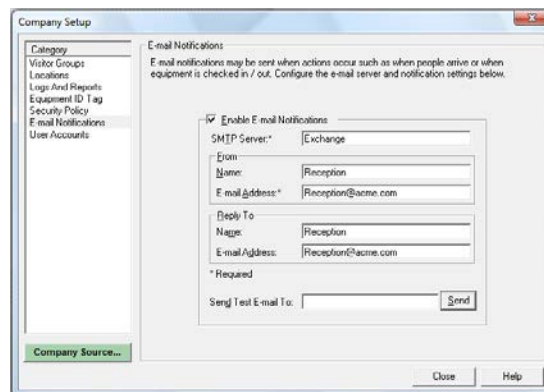


## Security Policy

*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 a Premier Edition feature.*

## E-mail Notifications

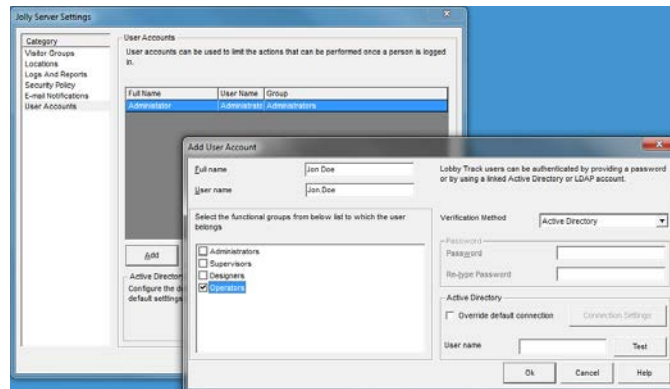
*E-mail Notifications* is used to define the server and account from which e-mail notifications are sent. E-mail notifications may be sent to the host when a visitor checks in or when alerts are triggered. *E-mail Notifications is a Premier Edition feature.*



## User Accounts

*User Accounts* define users allowed to use Lobby Track. Lobby Track user accounts can optionally be linked to Active Directory user accounts for single-sign on.

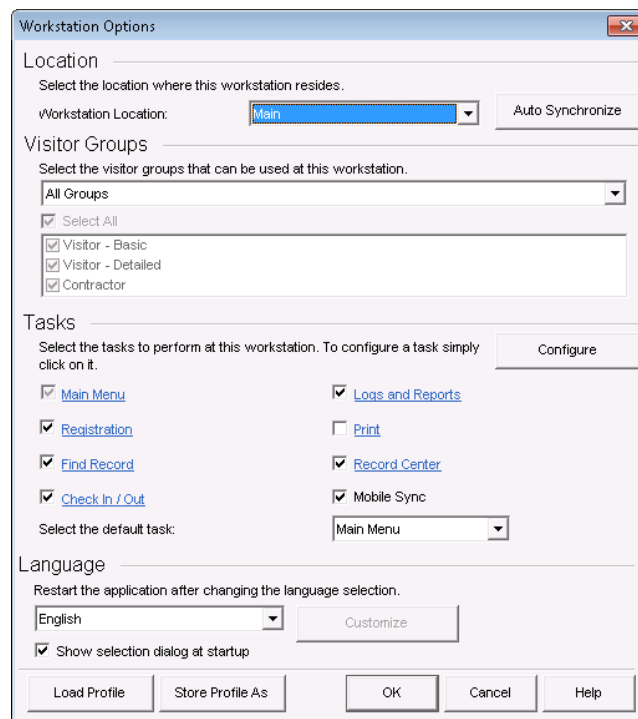
To add a new user select *Add...*



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

## Workstation Options and Devices

*Workstation Options and Devices* 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 Jolly Server Settings.

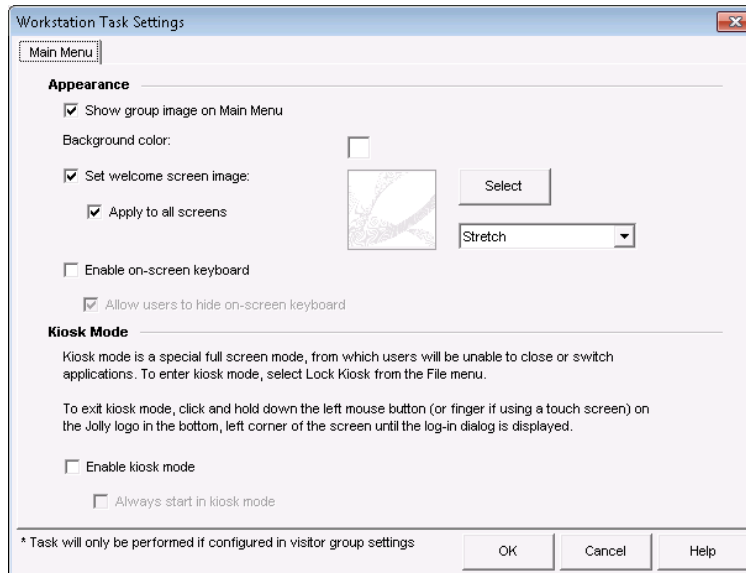
### Tasks

Configure the tasks to be performed on this workstation. It is recommended that the user first select the tasks available on this workstation and then go through each of the active tasks to examine the configuration options.

### Main Menu

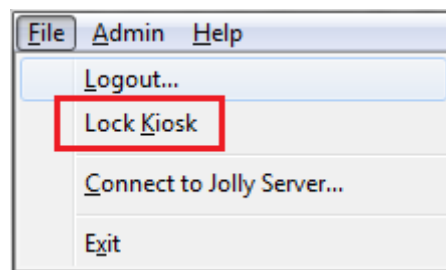
Any of the Lobby Track tasks may be set as the default screen that the program will return to when a task is completed. For frequent swiped check-ins make the default the

*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. A custom background image may also be imported here.



### ***Kiosk Mode***

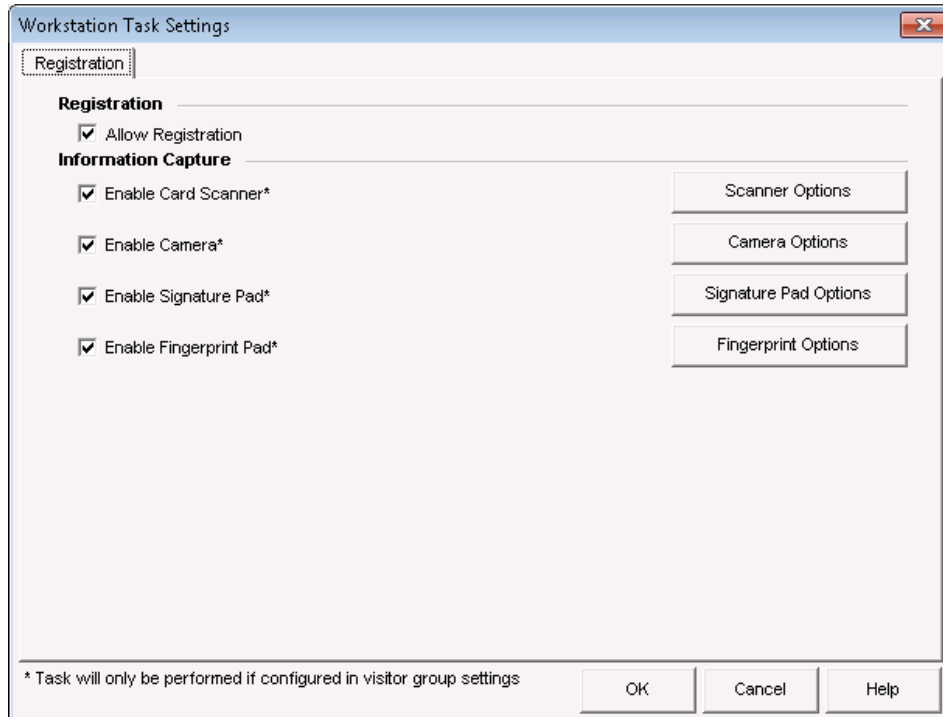
Lobby Track may be run in an unattended *Kiosk Mode*. Examples of such use are a check-in only station or a self-registration station. When run in *Kiosk Mode*, the user is unable to change applications or get to other areas of the computer and network: Lobby Track is locked to the screen. When outward facing to visitors, consider disabling show badge design, logs and reports, record center, equipment tracking and other areas where sensitive data may be revealed



User's Exit Kiosk Mode through holding down the Jolly Logo on the Main Menu for 6 seconds. A password is required to advance.

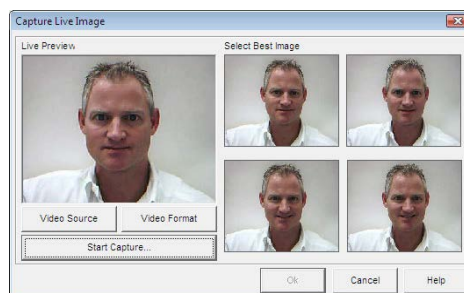
## Registration

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

Lobby Track supports TWAIN and WIA compatible cameras. The Premier Edition supports Canon SLR series Flash Cameras. The ability to capture a photo from within Lobby Track 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.





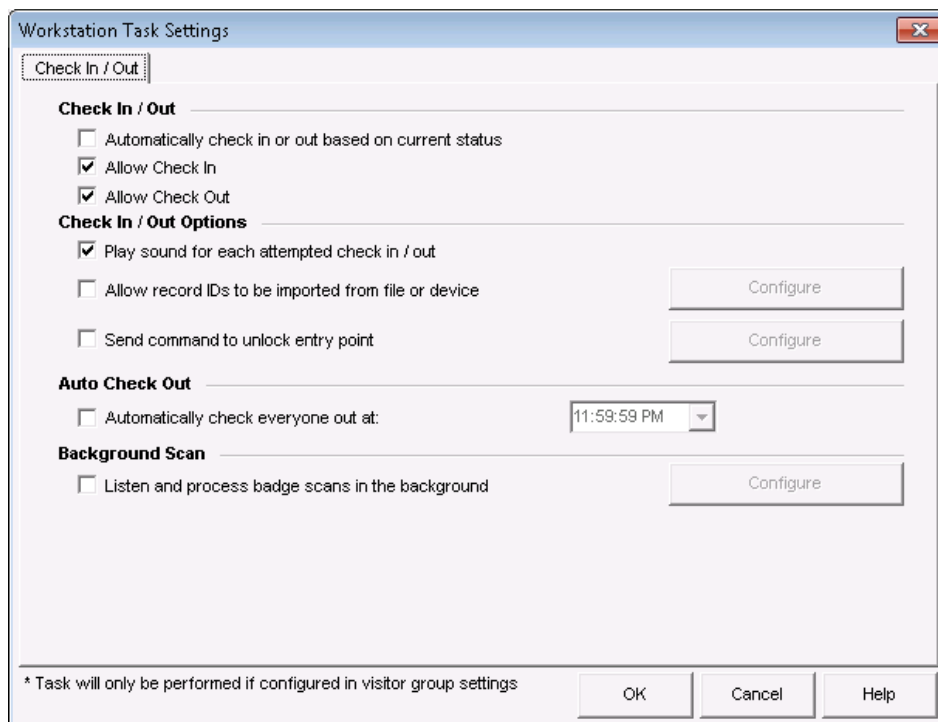
*Lobby Track supports Topaz and Interlink USB signature and fingerprint pad and Card Scanning Solutions ScanShell 800, ScanShell 1000 and SnapShell camera for driver's license and/or passport scanning. It does NOT support the 800N.*

*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

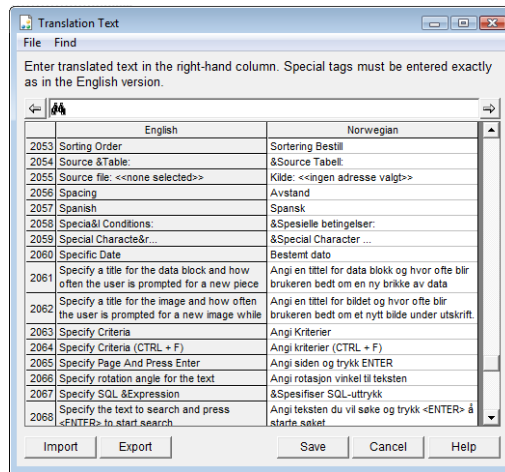
Providing a check in and/or out screen, like all tasks, is optional. Many organizations check people in, but do not require a check out: In this instance it is recommended that everyone be automatically checked out at a certain time of day. For organizations that require a check out, Lobby Track may 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.

*The option to "Listen and process badge scans in the background" is available. Barcode readers must be programmed with an STX and ETX commands for function.*



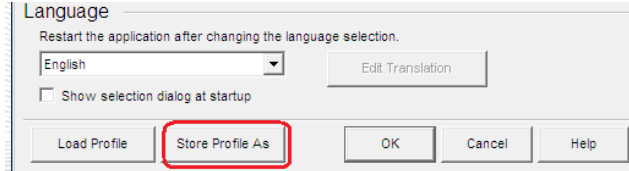
## Language

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.



## Workstation Profiles / Saving Workstation Options

Once the workstation is configured, the settings may be saved as a workstation profile. Profiles are used to quickly deploy the same configuration across multiple workstations. However, profiles may vary across a system: For example, there may be Front Desk, a Self-registration Kiosk and Check-in Station profiles all used together.

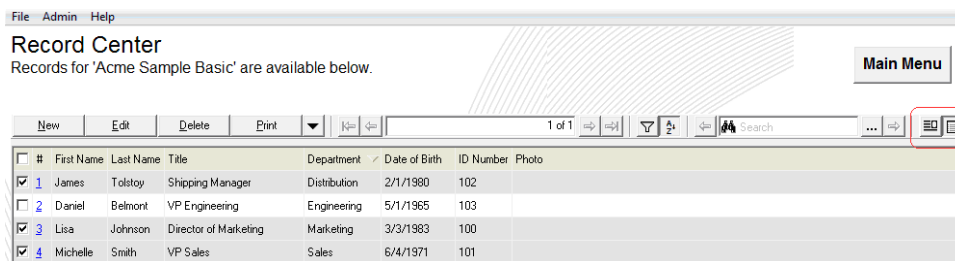


## Record Center

*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.

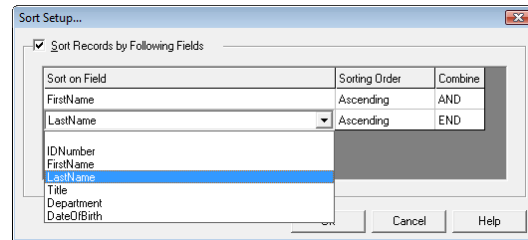


Records may be viewed in single-record or spreadsheet view by selecting the buttons on the right of the toolbar.



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.

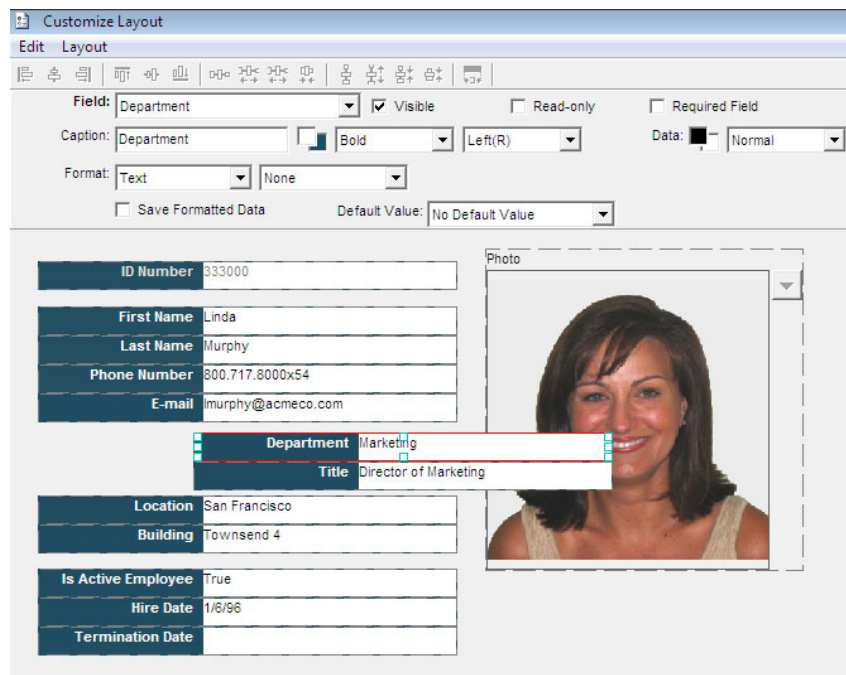
The toolbar contains *filter* and *sort* buttons  . Filters are used to create data subsets. Sorting allows for multiple field sort criteria.



## Configuring the Record Screen

Lobby Track has 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, alignment tools and other formatting options are provided on the menu bar.

Formatting options vary by edition. 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.



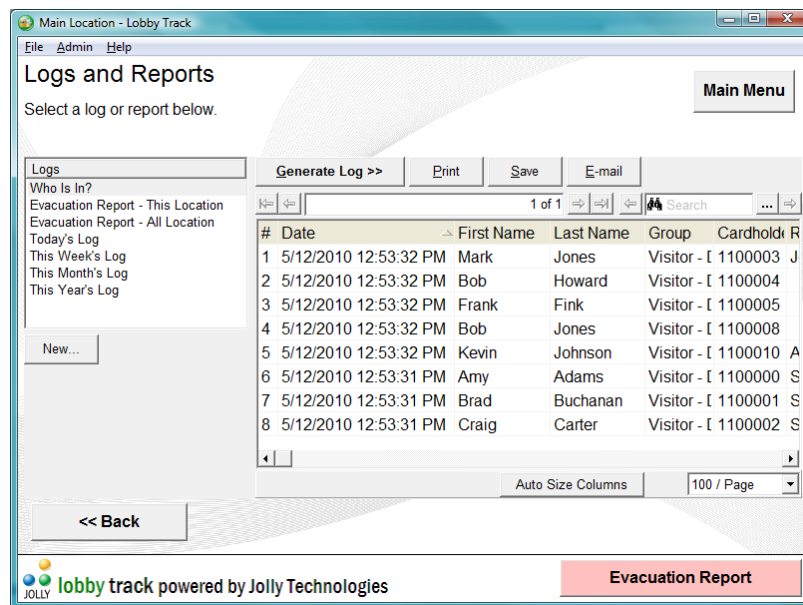
## Report Center

There are several types of reports built into *Report Center* and an additional evacuation report available on all screens.

Visibility of these features is set in the Logs and Reports area of the *Workstation Options*.

## Logs and Reports

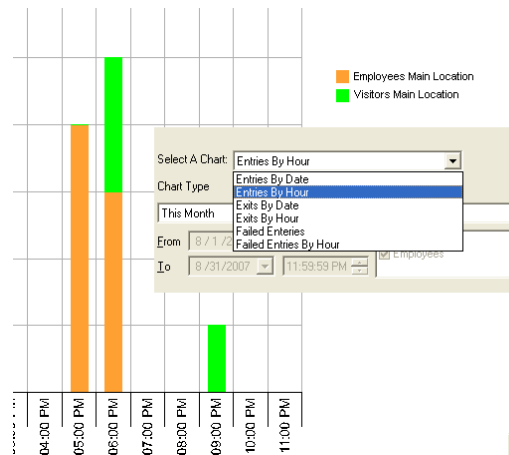
Lobby Track contains seven built-in reports. Custom reports can be added (*in the Advanced Editions*) by selecting *New* and configuring the *Custom Log Setup*.



Reports may be printed, saved to a file or e-mailed.

## Charts

Charts give a graphical representation of who has checked into the facility on what hours, days, and months.



## Query Records

Queries are used to pull all or a subset of records from the database. They are commonly used to export records. They may be named and saved for re-use. Queries designed in *Query Records* may be invoked in Record Center using the Filter Records function.

## Evacuation Report

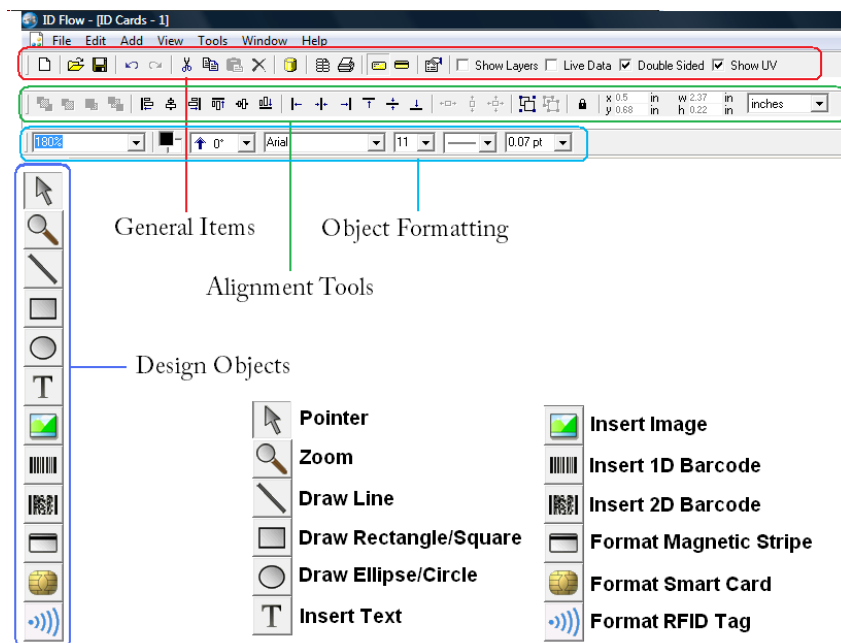
The *Evacuation Report* lists all visitors in all visitor groups that are checked in at the current location. This report is available by selecting the button at the bottom of every page.

## ID Flow Card Designer

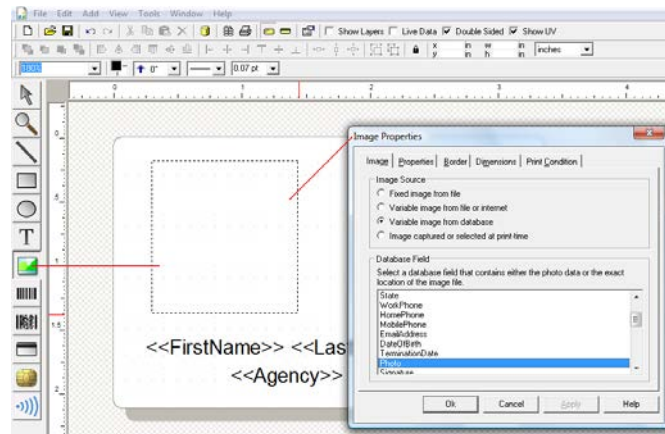
Lobby Track contains an integrated version of Jolly Technologies leading ID card product: ID Flow for the design of sophisticated ID cards and badges.

### Design Screen

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



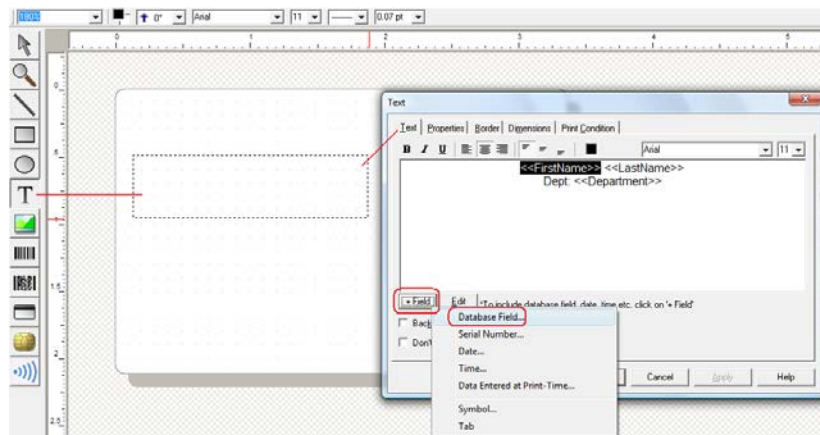
Cards are designed by selecting the design object on the left-hand toolbar and by drawing that object's area on the card with the mouse. After the area drawn the object's *Properties* dialog will appear. Click through the tabs to format the object.



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

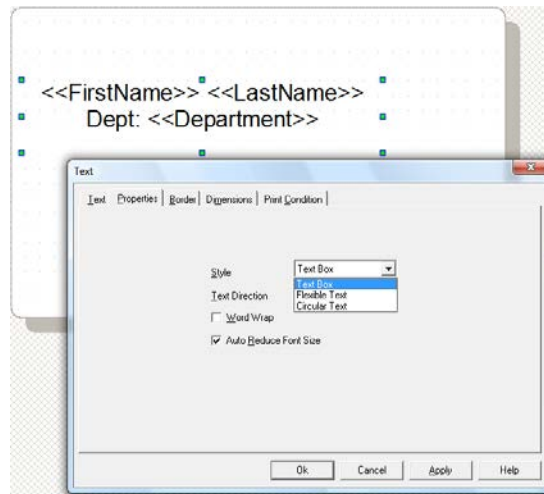
## Working with Text

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.

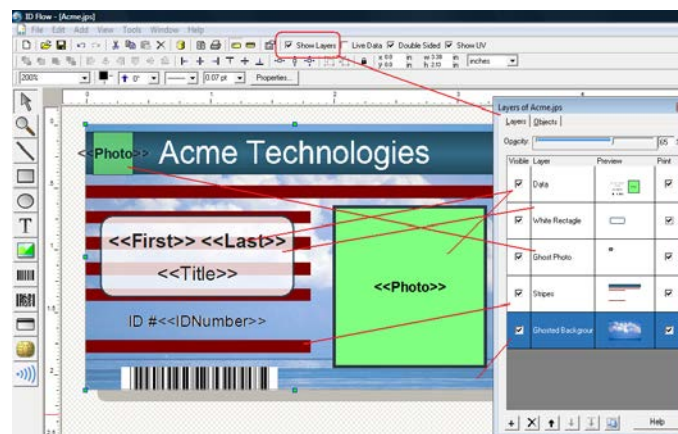




## Working with Layers

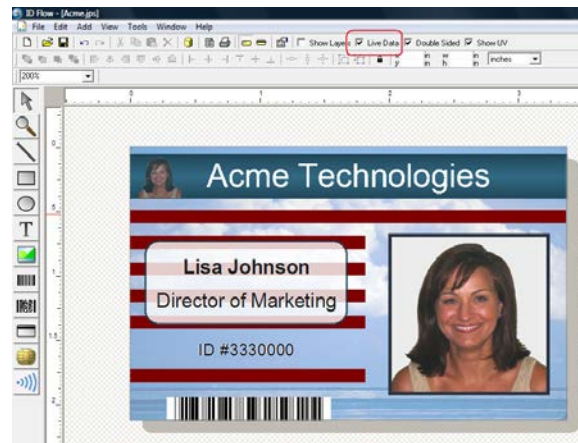
Like other quality graphical design tools, ID Flow uses a layered design approach. Layers may contain different design objects of varying opacity. Using layers adds a rich depth to design and creates highly secure cards.

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.

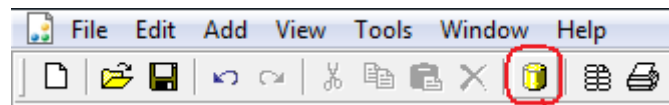


## Viewing Designs with Live Data

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

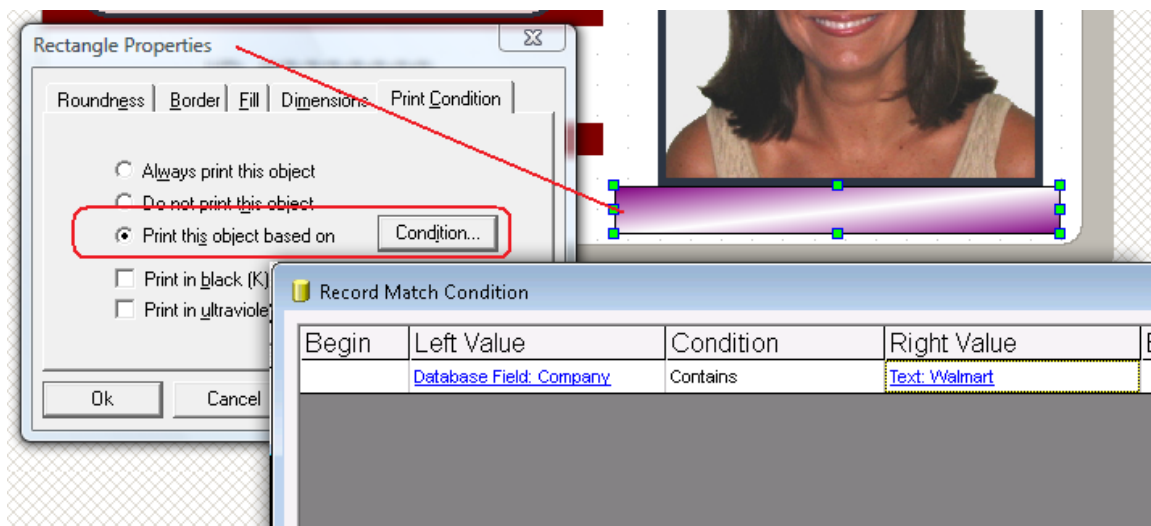


To view the full record set: go to *File -> Database Setup* or click the data icon on the top menu bar:



## 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.



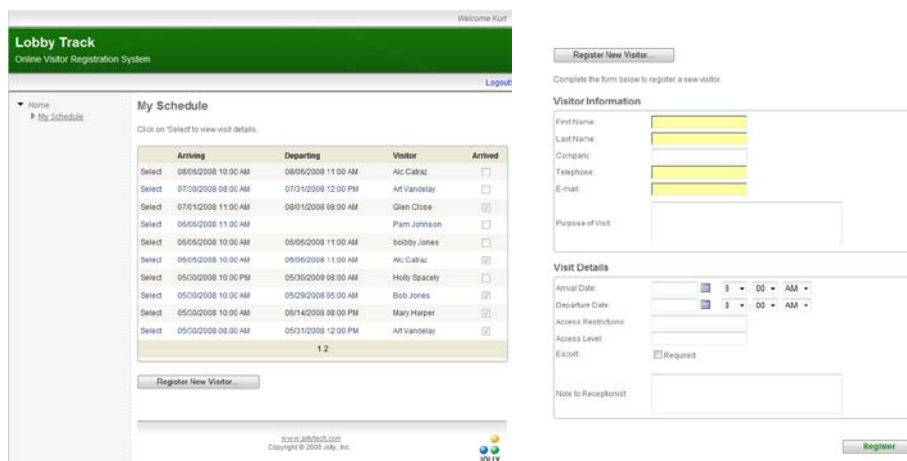


## Saving a File

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 Premier Edition*.



Pre-registered visitors check in via the *Find Record* button found in Lobby Track.

## Lobby Track Online System Requirements

Windows XP, Server 2003, Vista, Windows 7 or Server 2008

IIS 6.0/7.0

ASP .NET 3.5

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