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# **LOBBYGUARD<sup>®</sup>**

**Sign In. Sign Out. Secure.**

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## **LobbyGuard Assist**

### **User Guide**

*Version 4.2*

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## What's New

If you are already familiar with LobbyGuard Assist and would like to review the areas of this guide that apply to new features in this version, please refer to [Appendix G: What's New](#) for links to those sections.

## Getting Started

Thank you for making LobbyGuard Assist your visitor management system of choice. This User Guide will provide you with detailed information on the LobbyGuard Assist software. In conjunction with the dedicated support staff at LobbyGuard Solutions, you will have all you need to gain a full understanding of the proper use of LobbyGuard at your facility.



**If you have received your LobbyGuard Assist product and have not already installed the LobbyGuard Assist software and hardware, you should refer to the LobbyGuard Assist Installation Guide at this time. DO NOT ATTACH ANY LOBBYGUARD PERIPHERAL HARDWARE UNTIL INSTRUCTED TO DO SO IN THE INSTALLATION GUIDE. The LobbyGuard Assist installation guide is available at <http://www.lobbyguard.com/support>**

**If you need assistance at any time please contact LobbyGuard Technical Support using the information provided at the top of this page.**

**RECOMMENDED**  
**Review the Appendices at the end of this guide for important information and recommendations.**

## The LobbyGuard Assist Hardware

LobbyGuard Assist supports any combination of the following hardware peripherals:



Visitor Badge Printer



Bar Code Scanner



Camera



Scanshell Driver License Scanner



Snapshell Driver License Scanner



LobbyGuard Assist Station

Your installation of LobbyGuard Assist will make use of some combination of the above hardware peripherals. Complete information on the use of the hardware is covered in the appropriate sections below.

## The LobbyGuard Assist Software

The LobbyGuard Assist visitor management system is composed of two distinct software applications:

- **The LobbyGuard Assist Software** – The software that is used during sign-in and sign-out that displays the visitor input requests, prints visitor badges, performs background checks and records all visitor activity. The LobbyGuard Assist software can only be accessed from the computer on which it was installed.
- **The LobbyGuard Administrative Utility** – This software provides web-based access to a large variety of administrative functions, including visitor logs, reports, and changing various settings in the LobbyGuard Assist software. The LobbyGuard Administrative Utility can be accessed via a web browser from any PC on the internet.

**IMPORTANT**  
**LobbyGuard Assist is a “hosted” application. This means you MUST have an internet connection to your PC in order to run the software.**

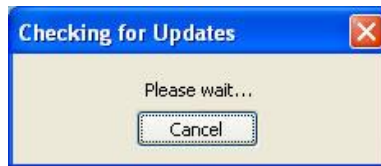
### Launching the LobbyGuard Assist Software

The LobbyGuard Assist software is the software used for signing your visitors in and out of your building. It contains all the user input requests as well as support for license scanning, bar code scanning, photographing and badge printing.

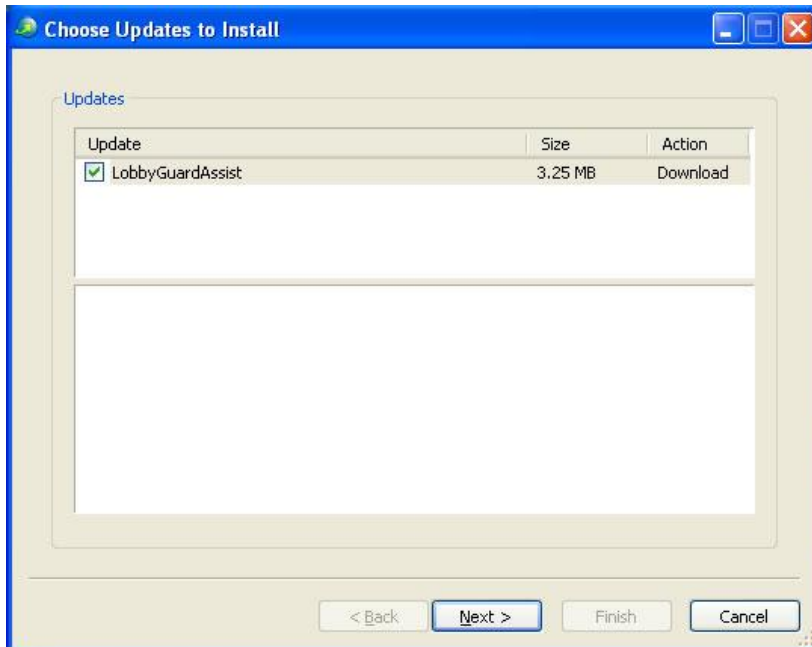
Launch LobbyGuard Assist software by clicking on the desktop icon:



LobbyGuard Assist will initially check for any new updates to the software; you will see the following:



LobbyGuard Solutions, LLC will publish updates to the LobbyGuard Assist software from time to time. These updates may contain new product features or address known issues in the product. If an update is available you will see the following:



It is **VERY IMPORTANT** to click **NEXT** if you see this screen. Clicking the Cancel button will cause your LobbyGuard Assist product to fail to update and this may cause operational errors. Once you have clicked the NEXT button you will see a series of installation screens; do not cancel at any time during this process. Doing so will prevent your product from updating and will require LobbyGuard Technical Support assistance to resume use of your LobbyGuard Assist software.

LobbyGuard Assist will restart upon completion of your software update. You will then see the following:



Click OK to view the LobbyGuard Assist software:

The LobbyGuard Assist software screen is composed of different areas of input that create the workflow for signing a visitor in to your building. Workflows are based on the "visitor type" that is selected from the top left portion of the screen. In the example above, the visitor types are "Visitor", "Faculty", "Employee" and "Contractor". Clicking on any of these visitor types will reveal the workflow for that visitor type, and may look different from the example above where "Visitor" is selected. In the following example the visitor type "Employee" is selected:

The screenshot shows the LobbyGuard web application interface. At the top left is the LobbyGuard logo with the tagline "Sign In. Sign Out. Secure.". To the right are navigation buttons: "Frequent Visitors", "Sign In", and "Visitor Log". Below these are tabs for "Visitor", "Faculty", "Employee" (which is selected and highlighted in orange), and "Contractor". The main content area is divided into two sections: "Personal Details" and "Photo". The "Personal Details" section has a "Name:" label followed by a text input field. The "Photo" section has a large empty box for a photo and a "Call Security" button. Below the photo box is a "Registration" section with a link "Assign Frequent Visitor Keytag". At the bottom right are "Submit" and "Cancel" buttons.

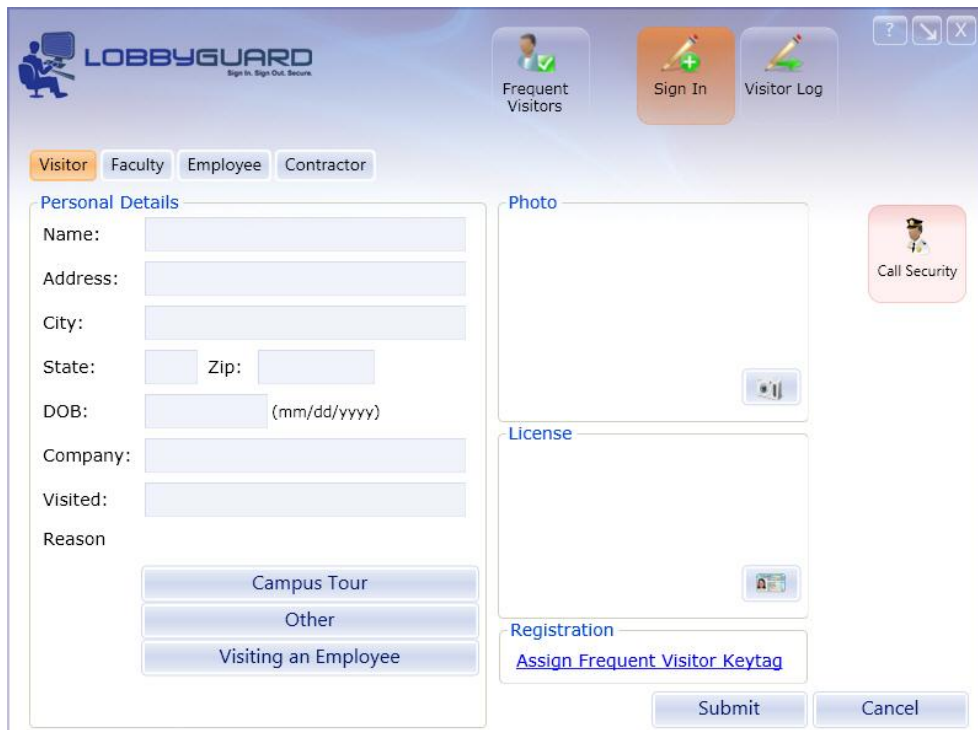
The "Employee" workflow is different from "Visitor" in that you are only required to enter the name of the employee and take a photo; the difference in workflow also slightly changes the look of the screen by hiding those areas not needed for "Employee" sign-in.

You can create as many visitor types as needed, label them as needed, and modify the associated workflow via the LobbyGuard Administrative Utility. For more information on configuring visitor types and workflows see the "[Workflow](#)" section below.

## Signing In

The key feature of LobbyGuard is the visitor sign-in process. This process has been designed to be as simple and efficient as possible while providing your facility with effective security and record keeping. LobbyGuard allows the sign-in process to be customized to the needs of your facility and to the type of visitor signing in. Typical steps for signing in a visitor are as follows:

1. Select the appropriate Visitor Type from the top left portion of the screen; in the example below we have chosen "Visitor". The chosen visitor button should turn orange and the appropriate workflow should appear:



The screenshot displays the LobbyGuard web application interface. At the top left is the LobbyGuard logo with the tagline "Sign In. Sign Out. Secure.". To the right are navigation buttons for "Frequent Visitors", "Sign In" (highlighted in orange), and "Visitor Log". Below these are tabs for "Visitor" (selected and highlighted in orange), "Faculty", "Employee", and "Contractor". The main form area is titled "Personal Details" and contains several input fields: "Name:", "Address:", "City:", "State:" (with a dropdown menu), "Zip:", "DOB:" (with a date format "(mm/dd/yyyy)"), "Company:", "Visited:", and "Reason". Below these fields are three buttons: "Campus Tour", "Other", and "Visiting an Employee". To the right of the "Personal Details" section is a "Photo" upload area with a camera icon and a "Call Security" button. Below the photo area is a "License" section with a license scan icon. At the bottom right, there is a "Registration" section with a link "Assign Frequent Visitor Keytag" and "Submit" and "Cancel" buttons.

2. Enter the information outlined in the "Personal Details" section of the screen. This includes name, address, city, state, ZIP and Date of Birth. You can enter this information manually or you can scan the visitor driver license and this information will be entered automatically via the license scan. Follow these steps to scan the driver license:

- a. In the bottom right portion of the screen you will see a section labeled "License". In this section will be one or both of the following License Scan buttons:



Scan front of license



Scan back of license

LobbyGuard supports the scanning of the front and/or back of a driver license. For more information on this technology and how to properly insert the driver license into your license scanner see [Appendix K: Scanning a Driver License in LobbyGuard Assist](#). Insert the visitor's license into your license scanner and press the License Scan button. Once the license has been successfully scanned, you will see an image of the license in the "License" section and the information from the license will populate the "Personal Information" section, as shown below:

The screenshot displays the LobbyGuard web application interface. At the top, there are navigation buttons for 'Frequent Visitors', 'Sign In', and 'Visitor Log'. Below these are tabs for 'Visitor', 'Faculty', 'Employee', and 'Contractor'. The 'Visitor' tab is selected, and the 'Personal Details' section is active. The form contains the following information:

- Name: JOHN WILLIAMS
- Address: 123 MAIN STREET
- City: RALEIGH
- State: NC Zip: 27609
- DOB: 05/07/1964 (mm/dd/yyyy)
- Company: (empty field)
- Visited: (empty field)
- Reason: (empty field)

Below the 'Reason' field are three buttons: 'Campus Tour', 'Other', and 'Visiting an Employee'. To the right of the 'Personal Details' section is a 'Photo' section with a 'Call Security' button. Below the 'Photo' section is the 'License' section, which displays a scanned driver license from the State of North Carolina. Below the 'License' section is the 'Registration' section with a link for 'Assign Frequent Visitor Keytag'. At the bottom right of the form are 'Submit' and 'Cancel' buttons.

3. Enter the visitor's company name in the "Company" field.
4. Enter the name of the person this visitor will be visiting in the "Visited" field.
5. Choose the reason for this visit by selecting from the options at the bottom left portion of the screen. In the example above the options are "Campus Tour", "Other", and "Visiting an Employee". These are called "Reasons for Visit" in LobbyGuard and are used to help better identify why this person is visiting today. Choose one of the reasons and the other reasons will become invisible, as shown below:

The screenshot shows the LobbyGuard web application interface. At the top, there are navigation buttons: "Frequent Visitors", "Sign In", and "Visitor Log". Below these are tabs for "Visitor", "Faculty", "Employee", and "Contractor". The "Visitor" tab is selected. The form is divided into several sections: "Personal Details" with fields for Name, Address, City, State, Zip, DOB, and Company; "Photo" with a placeholder and a "Call Security" button; "License" with a placeholder and a "Call Security" button; and "Registration" with a link to "Assign Frequent Visitor Keytag". The "Reason" field is set to "Visiting an Emplo" and has a red "X" icon to its left. At the bottom, there are "Submit" and "Cancel" buttons.

In the example above the reason selected was "Visiting an Employee". Click the red "x" to the left of this reason to change the selection.

6. Take the visitor photo by clicking the camera button, located in the "Photo" section. You will see the following screen:



Use the arrow controls to move the camera up/down/left/right, and the slider control to zoom in/out. When the visitor is lined up properly, click the camera button to take the photo. The photo will appear on the LobbyGuard Assist screen as shown below:

A screenshot of the LobbyGuard Assist web application interface. The top left features the LobbyGuard logo and navigation tabs for "Visitor", "Faculty", "Employee", and "Contractor". The "Visitor" tab is active. The "Personal Details" section contains input fields for Name (JOHN WILLIAMS), Address (123 MAIN STREET), City (RALEIGH), State (NC), Zip (27609), and DOB (05/07/1964). The "Company" field is XYZ Corporation, and the "Visited" field is LISA SMITH. The "Reason" field has "Visiting an Employer" selected. On the right, the "Photo" section shows the same man's photo with a camera icon. Below it is the "License" section showing a North Carolina driver's license. At the bottom are "Submit" and "Cancel" buttons. A "Call Security" button is also visible on the right side.

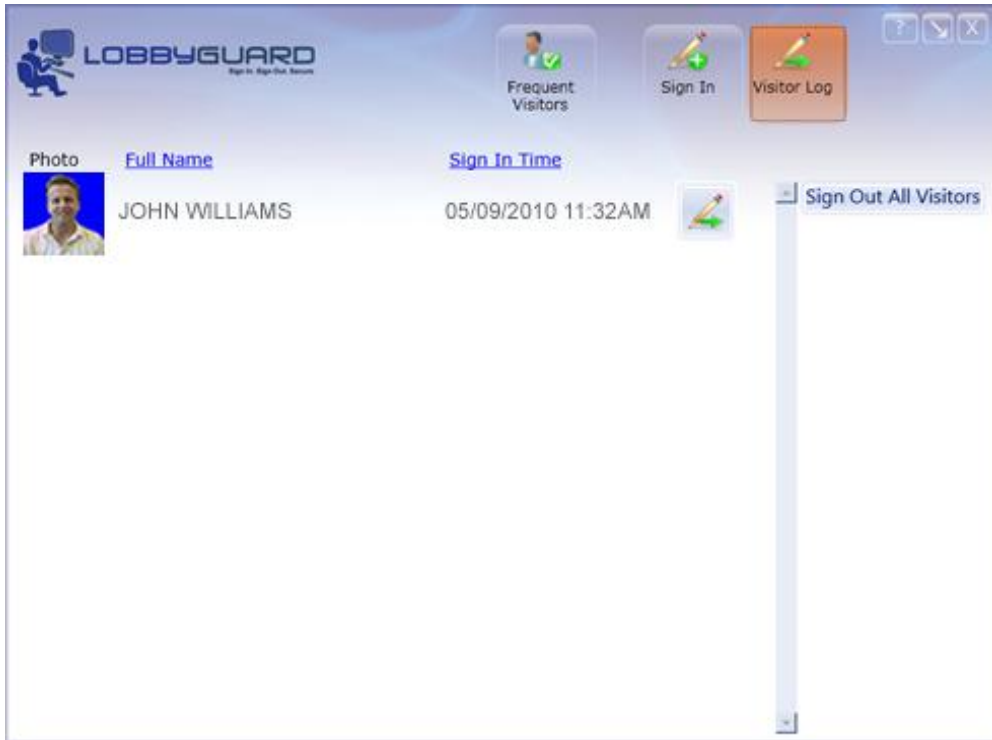
7. Click the SUBMIT button located at the bottom of the screen. The visitor record is submitted to the LobbyGuard database and a visitor badge is printed. For more information on the visitor badge see [Appendix L: The LobbyGuard Visitor Badge](#).

The steps you follow for visitor sign-in may not be exactly the same as above and will be dictated by the workflow options you set up in the LobbyGuard Administrative Utility. For more information on visitor workflow set up see "[Workflow](#)" section below.

## Signing Out

Signing visitors out as they leave the building is very quick and easy with LobbyGuard Assist. The following options are available for signing out your visitors:

- **Scan the Visitor Badge Bar Code** – the visitor badge that is printed during the sign-in process has a bar code on the bottom right corner. Scanning this bar code under the LobbyGuard bar code scanner will instantly sign this visitor out of the building. You will hear a "beep" when the bar code is successfully scanned. Bar code scanning can be done even when LobbyGuard Assist is not the active application on the Windows desktop; for example, you could scan out a visitor badge while viewing a web page, editing a spreadsheet, etc.
- **Sign Out using the LobbyGuard Assist Visitor Log** – click on the button labeled "Visitor Log" at the top of the LobbyGuard Assist software and you will see the LobbyGuard visitor log as shown below:



This screen provides a list of all visitors currently signed in. To the far right of each visitor record is a "Sign Out" button:



Clicking this button will sign out the visitor. Click on the button labeled "Sign Out All Visitors" to instantly sign everyone out of the building.

## LobbyGuard Assist Background Checking

One of the more powerful features of LobbyGuard Assist is the ability to screen visitors in order to keep the wrong people from entering your building. For information on how to set up your LobbyGuard product for background checking, see the section labeled "[Workflow](#)" below.

LobbyGuard Assist can instantly check your visitors against the following data sources:

- **The National Sex Offender Public Registry** – this is a registry of all registered sex offenders in the United States, including Washington, DC.
- **The Red Flag List** – this is a list of individuals whom you deem to be unwanted in your building. You have complete control over the names in this list; for more information on how to create your Red Flag List, see the section labeled "[Red Flag](#)" below.

### **IMPORTANT**





**LOBBYGUARD ASSIST DOES NOT LABEL ANY VISITOR AS A "SEX OFFENDER" OR AS AN UNWANTED INDIVIDUAL. THE SOFTWARE MATCHES INFORMATION OBTAINED DURING SIGN-IN AGAINST THE LIST OF INDIVIDUALS IN THE LOBBYGUARD BACKGROUND DATABASES. YOU MUST FOLLOW THE VALIDATION STEPS BELOW BEFORE TAKING ANY ACTION AGAINST THE VISITOR.**

## Sex Offender Failure

When a visitor attempts to sign in and fails a background check against the Sex Offender Registry, the following screen appears when you click the SUBMIT button:

4 possible matches

Please note that the information below is for comparative purposes only. If you feel that one of the offender records below matches the visitor, please follow your facility's procedures.

Visitor	Matches		
			
JOHN WILLIAMS	<u>WILLIAMS, JOHN</u>	<u>WILLIAMS, JOHN</u>	<u>WILLIAMS, JOHN</u>
6/14/1964 123 Main Street Raleigh NC 27609	6/14/1964 230 S 12th Ave MARTINSVILLE INDIANA, 46151	6/14/1964 1646 SINCLAIR ST Phoenix AZ, 85007	6/14/1964 1950 PAYTON RD FORT WAYNE INDIANA, 46808
	<input type="button" value="Remove Match"/>	<input type="button" value="Remove Match"/>	<input type="button" value="Remove Match"/>

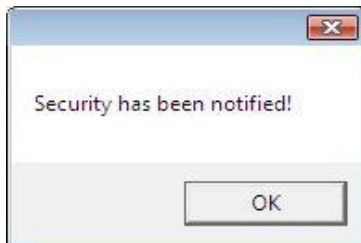
The visitor's information is on the left and the records and information for registered sex offenders whose information match this visitor are listed on the right. Use the information to determine if the visitor is or is not one of the registered offenders:

- Compare the photos. This is usually the fastest way to tell if the visitor is an offender, or if this is a 'false positive'.

- Compare the street address, being mindful that LobbyGuard conducts an instant national search and the offender may have recently moved or changed addresses.
- If you still do not have enough information, click on the offender's name, which is hyperlinked in blue. This will take you to the offender's page at the state where he or she is registered. This page will contain additional identifying information, such as height, weight, scars/marks/tattoos, etc.

If the visitor **IS NOT** the offender(s) listed, click the REMOVE MATCH button below the offender record. This will remove the offender record from the screen and LobbyGuard will never again match this particular offender to this particular visitor. Once all the offender records have been cleared in this manner, click the Close button in the bottom right corner of the screen. This will return you to the main LobbyGuard Assist sign-in screen, still populated with this visitor's information. Click SUBMIT once again, and the visitor background check will bypass the matching of this visitor to these offenders, resulting in your visitor getting a visitor badge and being successfully signed in.

If the visitor **IS** one of the listed offenders, click the NOTIFY SECURITY button located at the bottom of the screen. This button will instantly email and/or text message anyone in your organization who has been set up to receive these messages; for more information on how to set up these alerts see the section labeled "[Rules](#)" below. These individuals will receive a message indicating the location of the LobbyGuard Assist installation where the background failure has occurred as well as the name and date of birth of the person who has failed the background check. In addition you should follow your organization's prescribed procedures for dealing with an offender trying to gain entry. A screen will display notifying you that security has been alerted as shown below:



## Red Flag Failure

When a visitor attempts to sign in and fails a background check against the Red Flag List, the following screen appears when you click the SUBMIT button:



You will need to access the Red Flag List in the LobbyGuard Administrative Utility to review the entries and determine if this visitor is the individual listed on the Red Flag List. For more information on access to this area, see the section labeled "[Red Flag](#)" below.

## LobbyGuard Frequent Visitor Keytags

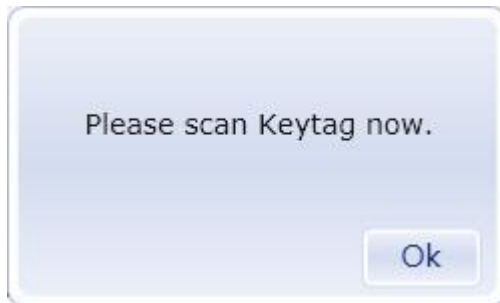
LobbyGuard Assist supports the use of LobbyGuard Frequent Visitor Keytags and LobbyGuard Stick-On Bar Codes to sign in and out of the building. Simply scan the bar code and the LobbyGuard Assist screen is instantly populated with the visitor's photo, license image and other information. Other advantages include the ability to track sign-in/sign-out activity for the purpose of running a time and attendance report; for more information on this feature see the section labeled "[Time and Attendance](#)" below. You will need a bar code scanner to use the LobbyGuard Frequent Visitor Keytags.

The following are images of the keytag and stick-on bar code. The keytag is attached to the user's keychain; the alternative stick-on bar code is highly adhesive and can be attached to an existing form of ID, such as an employee ID or a student ID.



Follow these steps to use a LobbyGuard Frequent Visitor Keytag or Stick-On Bar Code:

1. Register the visitor: enter the visitor's information into the LobbyGuard Assist screen as normal, and click the link labeled "Assign Frequent Visitor Keytag" located in the Registration section of the screen. You will see the following:



2. Scan the bar code on the keytag or sticker using the bar code scanner until you hear a "beep" sound.
3. Click the SUBMIT button. This visitor is now signed in and is now "registered" with this bar code. The keytag or bar code should be given to the visitor for use when they enter and leave the building in the future.
4. On subsequent visits, a registered visitor can scan the bar code to sign in and out of the building. Scanning the bar code toggles the visitor's current status: if they are currently signed in, it will sign them out; if they are currently signed out, it will sign them in. Scanning to sign in will instantly populate all the fields on the LobbyGuard Assist screen without the need to scan a license, take a photo, or other input:

The screenshot shows the LobbyGuard web application interface. At the top left is the LobbyGuard logo with the tagline "Sign In. Sign Out. Secure.". To the right are navigation buttons for "Frequent Visitors", "Sign In", and "Visitor Log". Below these are tabs for "Visitor", "Faculty", "Employee", and "Contractor", with "Visitor" selected. The main form is titled "Personal Details" and contains the following fields: Name (JOHN WILLIAMS), Address (123 MAIN STREET), City (RALEIGH), State (NC) and Zip (27609), DOB (05/07/1964), Company (XYZ Corporation), Visited (LISA SMITH), and Reason (Visiting an Employer). To the right of the form is a "Photo" section with a photo of a man and a "Call Security" button. Below the photo is a "License" section showing a North Carolina driver's license. At the bottom of the form is a "Registration" section with a link "Assign Frequent Visitor Keytag". The form has "Submit" and "Cancel" buttons at the bottom right.

Any needed changes can be made at this time; simply click SUBMIT to complete the sign-in process.

Using a keytag or bar code sticker to sign in does *not* bypass the background check and LobbyGuard will still print a visitor badge for this visitor.

LobbyGuard Frequent Visitor Keytags and Stick-On Bar Codes are available at [www.lobbyguard.com/supplies](http://www.lobbyguard.com/supplies).

## Frequent Visitor Mode

LobbyGuard Assist supports "Frequent Visitor Mode" to allow registered visitors (those carrying a LobbyGuard Frequent Visitor Keytag or Stick-On Bar Code) to sign in completely unassisted. This mode allows LobbyGuard Assist to function as a self-service visitor station and further reduces the time to process visitor traffic.

To operate LobbyGuard Assist in Frequent Visitor Mode, turn the bar code scanner to face visitor traffic and press the "Frequent Visitors" button on the screen:



Visitors can walk up and scan their keytags or stick-on bar codes to sign in or out of the building. If you are printing visitor badges for your visitors, you should also move the printer to a location where the visitor will have access to the badge after it prints.

Frequent Visitor Mode will not require the front desk operator to click "SUBMIT" in order to process visitors and can greatly reduce the time needed to process each visitor. If the visitor signs in and fails the background check, LobbyGuard will halt Frequent Visitor Mode and display the failed background screen as shown in the section labeled "[LobbyGuard Assist Background Checking](#)", above. If a visitor without a keytag or stick-on bar code needs to sign in, you will need to click the Frequent Visitors button once more to return to the regular sign-in mode. Frequent Visitor Mode can be run in the background in Windows, meaning you can use your PC for any other task while still signing in visitors.

## Call Security Button

The Call Security Button is located on the right side of the LobbyGuard Assist screen:



Clicking this button will immediately send out notification via email and/or cell phone text message to anyone in your facility set up to receive these alerts. This feature serves as a "silent alarm" that assistance is needed at the front desk. For instructions on how to configure individuals to receive this notification see the section labeled "[Rules](#)" below.

## The LobbyGuard Administrative Utility

### What is it?

The LobbyGuard Administrative Utility is web-based software that can be accessed from any PC on the internet. Since it is web-based, it does not require any installation to run – it is accessed via a web browser, just like any other web page.

The Administrative Utility provides the following features for the LobbyGuard Assist software:

- **Visitors** – View complete details of visitors to your building, including those who have been flagged by the LobbyGuard Background Check.
- **Reports** – Run reports on visitor traffic.
- **Registered Visitors** – Assign LobbyGuard Frequent Visitor Keytags or stick-on bar codes to visitors who frequent your facility for even faster sign in/out. Use the Registered Visitors section to manage this information.
- **Scheduled Activities** - Schedule upcoming visits and events with LobbyGuard.
- **Time and Attendance** – Modify the time a registered visitor has signed in/out of the LobbyGuard Assist software, in order to generate an accurate time and attendance report.
- **Rules** – Associate certain “Trigger” events within LobbyGuard with one or more “Actions”.
- **Administration** – Change workflow settings for various visitor types and other settings for your LobbyGuard Assist software.

### Accessing the Administrative Utility

The LobbyGuard Administrative Utility can be accessed from any web browser. Access the LobbyGuard Administrative Utility by typing the following URL into the web browser:

<http://admin.lobbyguard.com>

The site should appear in your web browser as follows:



The screenshot shows the LobbyGuard Administrative Utility login page. At the top, the LobbyGuard logo is displayed with the tagline "Sign In. Sign Out. Secure." Below this, the title "Administrative Utility" and version "4.2" are shown. The login form includes three input fields for "Domain:", "Email:", and "Password:". A checkbox labeled "Save Email and Password?" is positioned below the password field. A "login" button is located below the checkbox. A link "Need help logging in?" is provided below the login button. At the bottom of the page, there are four circular icons representing "Support" (wrench and screwdriver), "Supplies" (box), "Contact" (@ symbol), and "Tutorials" (document). The footer text reads "Copyright 2010 LobbyGuard Solutions, LLC All Rights Reserved".

You should have received the necessary credentials to log in to the Administrative Utility when you received your LobbyGuard Assist product. Please contact LobbyGuard Support at this time if you do not have your credentials. Enter the credentials for your user account and click the "login" button. The default email address is admin@lobbyguard.com and the default password is 12345. It is recommended that this default account be deleted as soon as possible and individual user accounts be created for users of the Administrative Utility; for more information on creating additional user accounts see the section titled "[User Manager](#)". If you have set up your own unique user account and are having trouble signing in, the LobbyGuard link "Need help logging in?" will allow you to enter your Domain name and email address and your password will be emailed to you.

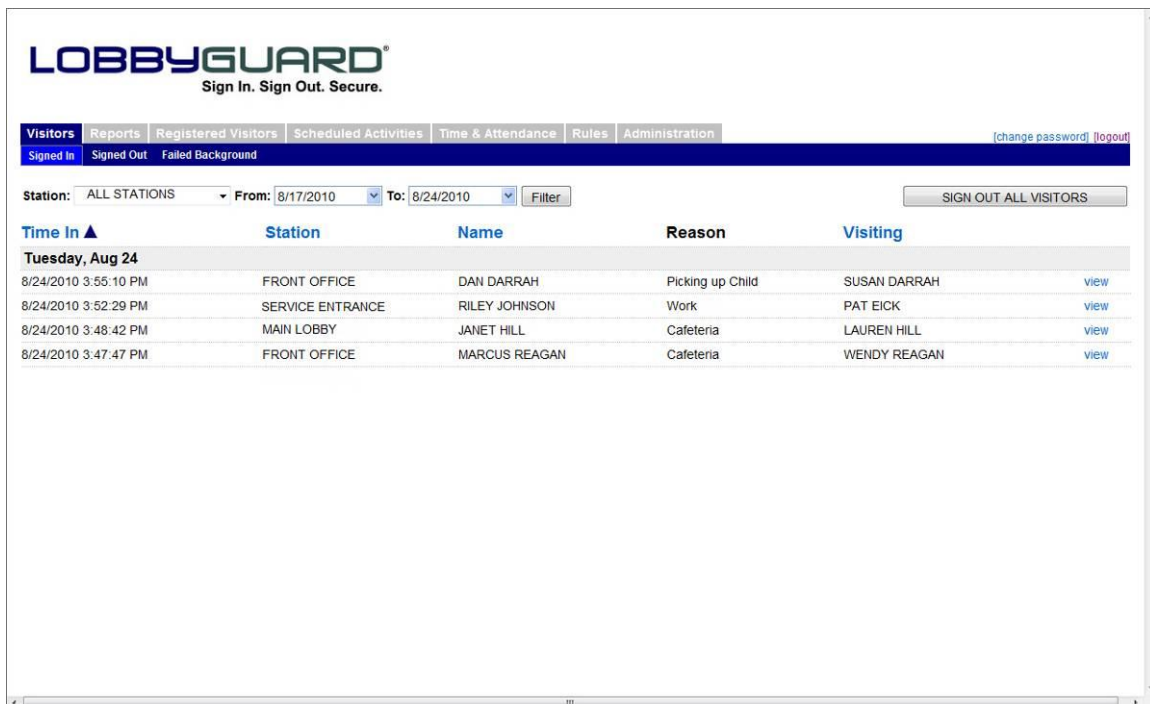
**IMPORTANT**

**It is recommended that you remove the default user account and create your own unique user account as soon as possible.**

## Using the Administrative Utility

### Visitor Log

The main feature of the Administrative Utility is the visitor log. This screen will give you an immediate view of visitors who are currently in the building as well as an archive of visitors who have signed out at any point in the past. The visitor log will resemble the following:



The screenshot shows the LobbyGuard administrative utility interface. At the top, there is the LobbyGuard logo and tagline. Below that is a navigation menu with tabs for Visitors, Reports, Registered Visitors, Scheduled Activities, Time & Attendance, Rules, and Administration. The 'Visitors' tab is active, and there are sub-tabs for Signed In, Signed Out, and Failed Background. A search area includes a 'Station' dropdown set to 'ALL STATIONS', 'From' and 'To' date pickers set to '8/17/2010' and '8/24/2010' respectively, and a 'Filter' button. A 'SIGN OUT ALL VISITORS' button is also present. The main content area displays a table of visitor logs for 'Tuesday, Aug 24'. The table has columns for Time In, Station, Name, Reason, and Visiting. The data rows are as follows:

Time In ▲	Station	Name	Reason	Visiting
<b>Tuesday, Aug 24</b>				
8/24/2010 3:55:10 PM	FRONT OFFICE	DAN DARRAH	Picking up Child	SUSAN DARRAH <a href="#">view</a>
8/24/2010 3:52:29 PM	SERVICE ENTRANCE	RILEY JOHNSON	Work	PAT EICK <a href="#">view</a>
8/24/2010 3:48:42 PM	MAIN LOBBY	JANET HILL	Cafeteria	LAUREN HILL <a href="#">view</a>
8/24/2010 3:47:47 PM	FRONT OFFICE	MARCUS REAGAN	Cafeteria	WENDY REAGAN <a href="#">view</a>

If you have several LobbyGuard Assist installations networked together, you can choose to view data from a specific station by selecting it from the "Station" drop-down menu. You can choose the date range of data using the From: and To: calendar menus, and then click the Filter button to activate your date range selection. Clicking on any column header (Time In, Station, etc) will sort the data accordingly; clicking on the same column header again will reverse the sort order. Clicking the "Sign Out All Visitors" button will move all visitors from the Signed In section to the Signed Out section.

The Visitor Log contains three sections: Signed In, Signed Out, and Failed Background.

### Signed In

The Signed In section of the visitor log shows all visitors who are currently signed in. Using the Signed In log you can immediately view the Time In (the date and time the visitor signed in), the Station (the location the visitor signed in), the visitor's name, the Reason for visit (see the section labeled "[Signing In](#)" for an explanation of this feature) and the Visiting column, which contains the name of the person in your building the visitor is visiting. To the far right of each entry is a hyperlink labeled "view". Clicking on this hyperlink for any given visitor will display full details on the visitor in the Visitor Properties screen:

The screenshot shows the LOBBYGUARD Visitor Properties screen for a visitor named BRIAN SMITH. The page includes a navigation menu with options like Visitors, Reports, Registered Visitors, Scheduled Activities, Time & Attendance, Rules, and Administration. The current view is 'Signed In' and 'Visitor Properties'. The form contains the following fields: Name (BRIAN SMITH), Last Background Check (7/20/2010 1:14 48 PM), Station (MAN ENTRANCE), Type (Visitor), Birthdate (4/15/1970), Address (3939 Smithfield Rd.), City (Rochester), State (MN Minnesota), Zip (78938), Height (62), Hair (Brown), Eyes (Brown), Person Visited (Chad), Company (Smith's Construction), and Reason (Picking up Child). There are 'Save Changes' and 'Cancel' buttons at the bottom. On the right side, there is a 'File Photo' section with a photo of Brian Smith and a 'License Scan' section with a scan of his driver's license.

This screen contains all the details on the visitor. The visitor photo and the driver license can be enlarged by clicking on the image. The visitor can be manually signed out by clicking on the "Sign Out" button located in the lower left side of the screen. This will move this visitor from the "Signed In" section of the visitor log to the "Signed Out" section of the visitor logs.

Information stored on this screen can be modified as needed. Click the button labeled "Save Changes" to save any modifications.

The "Create Red Flag" link located to the right of the visitor name will move this visitor to the Red Flag list. This will cause this visitor to fail the background check on future visits. For more information on this process see the section labeled "[Failed Background](#)"

### Signed Out

The Signed Out section of the visitor log contains the information on all visitors who have been signed out of the building at any point in the past, creating an archive of visitor information that you can access at any time. The Signed Out section appears as follows:

Time In ▲	Time Out	Station	Duration	Name	Reason	Visiting	
<b>Tuesday, Aug 24</b>							
8/24/2010 3:49:52 PM	8/24/2010 2:50:31 PM	FRONT OFFICE	00:59:21	JASON TOMPSON	Cafeteria	DAN DARRAH	<a href="#">view</a>
8/24/2010 3:33:05 PM	8/24/2010 2:33:10 PM	FRONT OFFICE	00:59:55	MARCUS JACKSON	Cafeteria	TOM JACKSON	<a href="#">view</a>
8/24/2010 3:24:59 PM	8/24/2010 2:30:06 PM	FRONT OFFICE	00:54:53	JANET HILL	Cafeteria	LAUREN HILL	<a href="#">view</a>
8/24/2010 3:23:02 PM	8/24/2010 2:23:54 PM	SERVICE ENTRANCE	00:59:08	RILEY JOHNSON	Work	PAT EICK	<a href="#">view</a>
<b>Monday, Aug 23</b>							
8/23/2010 3:48:29 PM	8/24/2010 1:28:14 PM	FRONT OFFICE	21:39:45	CHANTE WILLIAMS	Picking up Child	OWEN WILLIAMS	<a href="#">view</a>
8/23/2010 3:41:53 PM	8/23/2010 3:46:15 PM	FRONT OFFICE	00:04:22	ROBERT JOHNSON	Eleanor Roosevelt	WENDY REAGAN	<a href="#">view</a>

This screen is very similar to the Signed In log, with the addition of two columns: the Time Out column displays the day and time the visitor signed out of the building and the Duration column which displays how long this visitor was in your building in the format of hours:minutes:seconds. Clicking the "view" link will provide detail on the visitor record.

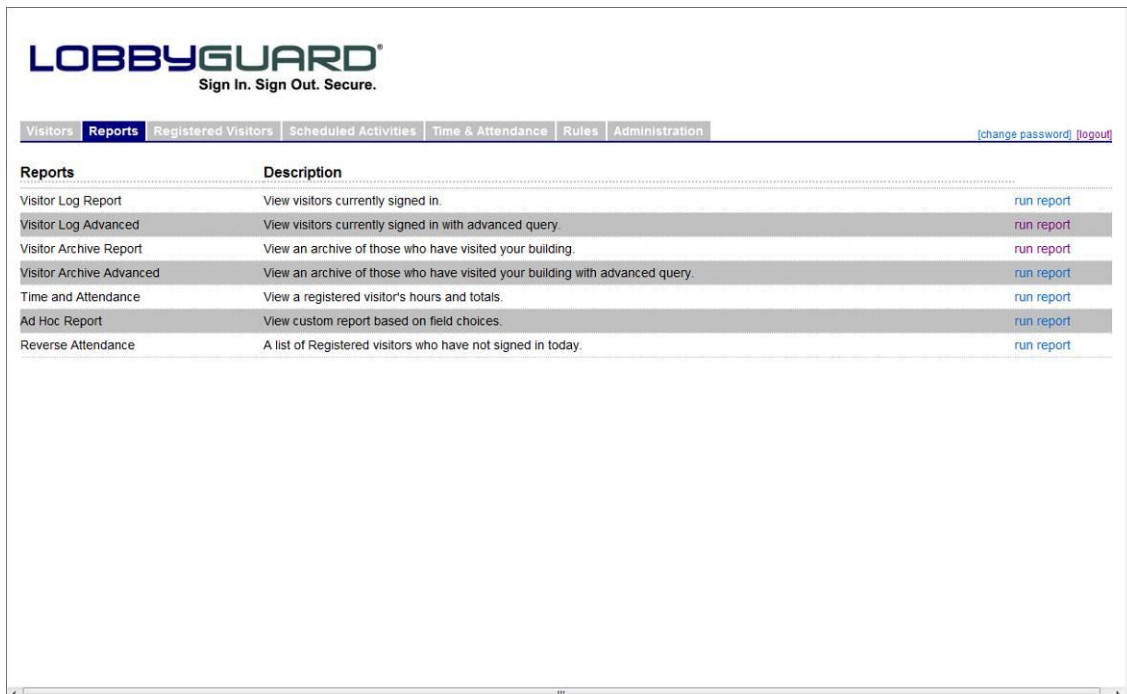
### Failed Background

This area of the Administrative Utility is used exclusively by the LobbyGuard Kiosk product. All instructions for handling visitors who fail the background using LobbyGuard Assist are contained in the

section labeled "[LobbyGuard Assist Background Checking](#)", above. For more information on the LobbyGuard Kiosk visit [www.lobbyguard.com](http://www.lobbyguard.com).

## Reports

This section allows you to run reports based on criteria that you select. The Reports screen appears as follows:



The screenshot shows the LobbyGuard web interface. At the top is the LobbyGuard logo and tagline. Below is a navigation menu with tabs for Visitors, Reports, Registered Visitors, Scheduled Activities, Time & Attendance, Rules, and Administration. The Reports tab is selected. The main content area displays a table with two columns: Reports and Description. Each row in the table includes a 'run report' link on the right side.

Reports	Description	
Visitor Log Report	View visitors currently signed in.	<a href="#">run report</a>
Visitor Log Advanced	View visitors currently signed in with advanced query.	<a href="#">run report</a>
Visitor Archive Report	View an archive of those who have visited your building.	<a href="#">run report</a>
Visitor Archive Advanced	View an archive of those who have visited your building with advanced query.	<a href="#">run report</a>
Time and Attendance	View a registered visitor's hours and totals.	<a href="#">run report</a>
Ad Hoc Report	View custom report based on field choices.	<a href="#">run report</a>
Reverse Attendance	A list of Registered visitors who have not signed in today.	<a href="#">run report</a>

The reports section contains a list of reports that are available in LobbyGuard. Clicking on the "run report" link to the right of the report will generate the report you need. Some reports may require additional parameters, such as a date range for the report, station name, or other information. Clicking the "run report" link for the "Visitor Archive Report" will display the following:

**LOBBYGUARD**  
Sign In. Sign Out. Secure.

Visitors | **Reports** | Registered Visitors | Scheduled Activities | Time & Attendance | Rules | Administration | [change password](#) | [logout](#)

### Visitor Archive Report

Choose start date: 7/5/2010 | Choose end date: 8/5/2010

Select Visitor Type: -- All Visitor Types --

Select Registered User: -- All Visitors --

Select Station: -- All Stations --

In this example a number of criteria can be set for the report, including the date range, the visitor type and the name of a specific registered user, if needed. The "Select Station" option allows the selection of an individual LobbyGuard installation; the report will only reflect data gathered from that station. Each report can be viewed online, printed, or saved in a number of formats. If you wish to run a different report listed on the Reports page, simply select the "run report" link at the end of the line of the report you wish to view and enter the information. An example of a Visitor Archive Report that is retrieved from information entered from the above screen is listed below:

Page 1 of 1 100% Whole report Pdf

### Visitor Archive Report

Report Created: 8/5/2010 Number of Records: 5

Sign-In Date	Sign-Out Date	Name	Visitor Type	Reason	Visiting	Duration
7/22/2010 10:49:42 AM	8/2/2010 12:53:05 PM	SMLNE BRIAN	Volunteer	Cafeteria	KEVIN ALLEN	11.02:03:23
7/22/2010 10:50:13 AM	8/2/2010 12:53:05 PM	HOWARD GREG	Volunteer	Conference	KEN SHORT	11.02:02:52
7/27/2010 9:12:12 AM	7/27/2010 9:12:27 AM	GREEN SCOTT	Employee	1st Floor	JOHN HOGAN	00:00:15
7/28/2010 9:00:58 AM	7/28/2010 9:01:03 AM	MIL JASON	Visitor	2nd Floor	Jane Doe	00:12:33
7/15/2010 3:39:00 PM	8/2/2010 12:53:05 PM	DOE JOHN	Employee	Attending a Meeting	Jane Doe	01:49:44

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## Registered Visitors

The Registered Visitors section allows for management of individuals who are registered with your station. Registered users are those users who possess a LobbyGuard Frequent Visitor Keytag, or who have a LobbyGuard stick-on bar code on an existing ID. Frequent Visitor Keytags are very useful for regular visitors as they allow the visitor to bypass much of the workflow and to quickly sign the registered visitor in and out of the station by simply scanning the bar-coded section of the keytag or stick-on bar code under the bar code scanner. For more information on this process, see the section titled "[LobbyGuard Frequent Visitor Keytags](#)". Images of the LobbyGuard keytags and stick-on bar codes are shown below:



The Registered Visitors section appears as shown below:

Name ▲	Visitor Type	ID	Expiration Date	
SCOTT GREENOUGH	Employee	LG2013348	12/31/2010	<a href="#">view</a>
GREGORY HOWARD	Visitor	LG2026917	2/14/2011	<a href="#">view</a>
ROBERT JOHNSON	Visitor	LG2026919	1/1/2011	<a href="#">view</a>
JASON MILNER	Visitor	LG2026914	12/31/2011	<a href="#">view</a>
BRIAN MORRIS	Visitor	LG2026915	5/19/2011	<a href="#">view</a>
SEAN SMITH	Volunteer	LG2026916	12/31/2010	<a href="#">view</a>
LOU STINEBISER	Visitor	LG2026911	11/23/2010	<a href="#">view</a>

The names of the registered visitors are displayed with the following columns:

- **Name** – The name of the registered visitor.
- **Visitor Type** – The visitor type is the type of visitor this person represents, based on the Visitor Types set up in the workflow. For more information on Visitor Types see the section titled "[Workflow](#)". Each Registered Visitor is registered as a visitor type for the purposes of reporting and sign-in workflow.
- **ID** – This is the number located below the bar code on the LobbyGuard Frequent Visitor Keytag or bar code sticker.
- **Expiration Date** - Displays the date that the visitor's keytag or bar code sticker will expire. The LobbyGuard station will not recognize the keytag or bar code sticker after this date.

Clicking on any of these column headings will sort the list of registered visitors via that column's data. Clicking the same column again will reverse the sort order (ascending / descending).

You can search for a particular registered visitor by entering the last name of the visitor in the "Last Name" field at the top of the page and clicking the button labeled "Search". You can also search for a particular keytag or bar code sticker by entering the number on the bar code in the "LobbyGuard ID" field. The "Number of Results" menu will limit the number of returned names for a given search.

There are two ways to create a new registered visitor in LobbyGuard:

- When a non-registered visitor is being signed in, the front desk personnel will be able to click on the link "Assign Frequent Visitor Keytag" after the visitor's information is entered in the visitor sign-in fields. For more information on registering a visitor in this manner see the section labeled "[LobbyGuard Frequent Visitor Keytags](#)" above.
- A visitor can also be registered via the Administrative Utility. This is done by clicking the "Add New" link on the right side of the Registered Visitors tab on the Administrative Utility.

Clicking the "Add New" link will display the following screen:

The screenshot shows the LobbyGuard web interface for adding a new registered visitor. At the top, the LobbyGuard logo and tagline "Sign In. Sign Out. Secure." are visible. Below the logo is a navigation menu with tabs for "Visitors", "Reports", "Registered Visitors" (which is selected), "Scheduled Activities", "Time & Attendance", "Rules", and "Administration". There are also links for "[change password]" and "[logout]".

The form contains the following fields and options:

- LobbyGuard ID:** A text input field with a note: "Must use the following format: LG 0000000 (L.G. space, 7-digit number)".
- First Name:** A text input field.
- Last Name:** A text input field.
- Type:** A dropdown menu currently set to "Visitor".
- Birthdate:** A date selection field.
- Registration Expiration Date:** Two radio button options: "This registration never expires" (selected) and "This registration will expire on the following date:". Below the second option is a date selection field set to "9/5/2010".
- Notes:** A large text area for entering additional information.
- Photo:** A note on the right side of the form says "No Photo on file."
- Add:** A blue button at the bottom left of the form to submit the registration.

Enter the requested information into the fields to create the new registered visitor. The LobbyGuard ID number should be entered exactly as it appears on a LobbyGuard Frequent Visitor keytag or bar code sticker. The Registration Expiration Date can be used to set a date for the keytag or bar code sticker to no longer be recognized by the station. This can be useful for contractors who are scheduled for short-term work in the building or for parents whose keytag or bar code sticker should expire at the end of the school year, etc. Click the "Add" button when all the information has been entered. The visitor should be provided with the newly-registered keytag or bar code sticker and will be able to use it immediately.

The details for a registered visitor will appear as follows:

The screenshot displays the LobbyGuard web interface for managing registered visitors. The top navigation bar includes tabs for 'Visitors', 'Reports', 'Registered Visitors', 'Scheduled Activities', 'Time & Attendance', 'Rules', and 'Administration'. The 'Registered Visitors' tab is active. The form contains the following fields and options:

- LobbyGuard ID:** LG8675309 (with a note: 'Must use the following format: LG 0000000 (LG, space, 7-digit number)')
- First Name:** Brian
- Last Name:** Smith
- Type:** Visitor (dropdown menu)
- Birthdate:** 10/26/1968 (dropdown menu)
- Registration Expiration Date:** 12/23/2010 (dropdown menu). Radio buttons allow for 'This registration never expires' or 'This registration will expire on the following date:'.
- Notes:** A large text area for additional information.
- Buttons:** 'Update' and 'Unregister' at the bottom.
- Photo and License:** A 'File Photo' section shows a photo of a man, and a 'License Scan' section shows a scan of a North Carolina license.

You may change any of the information on this screen and click "Update" to save the changes. If you wish to completely remove this person from the list of registered visitors, click the "Unregister" button at the bottom of the screen.

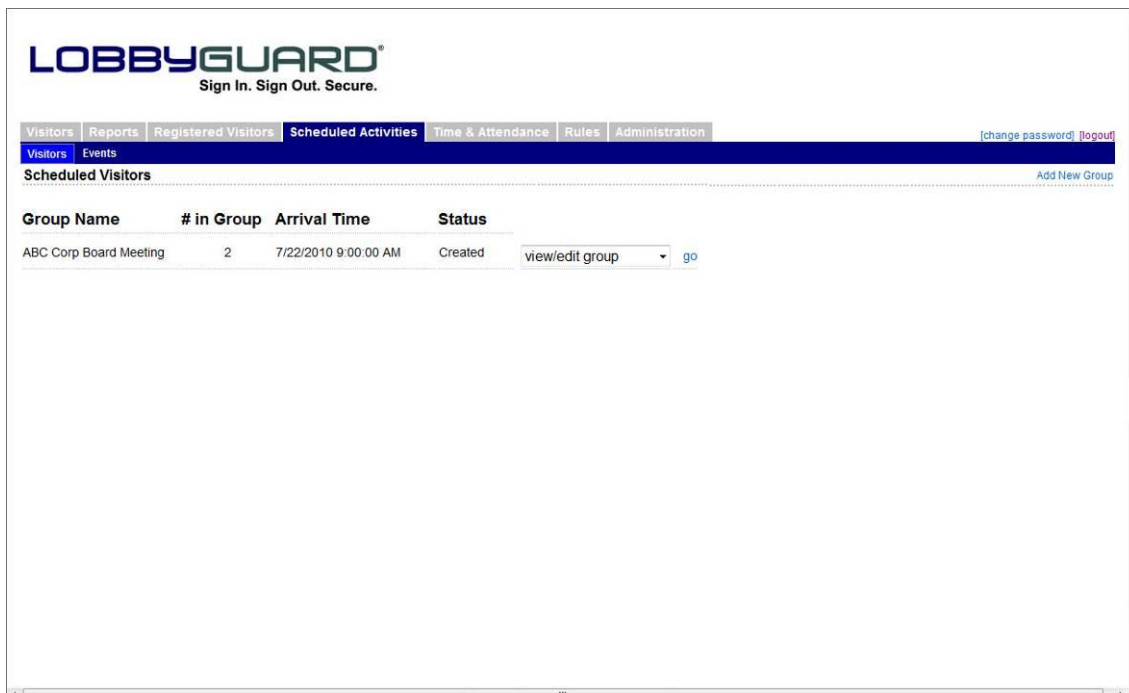
## Scheduled Activities

The LobbyGuard Scheduled Activities tab provides methods for scheduling upcoming visitor appointments. The Visitors section provides an area to schedule a visitor or group of visitors and email the information regarding the scheduled visit to the visitors. The Events section allows for the creation of upcoming events; this section is available for use only with the LobbyGuard Kiosk product. For more information on the LobbyGuard Kiosk please visit [www.lobbyguard.com](http://www.lobbyguard.com).

## Visitors

The Visitors feature lets you schedule a visitor or group of visitors in advance of his or her visit, then send an email notification to the visitor that outlines the visit location, time, and other information.

The Visitors screen appears as follows:



Scheduled Visitors are organized as "groups" that represent parties of people who will be visiting together. A group may consist of one person or any number of people. In the illustration above, a group named "ABC Corp Board Meeting" consisting of 2 people is scheduled

to arrive at 9:00 AM on July 22nd. The "Status" column indicates this group was created and no further action has been taken at this time.

Click the "Add New Group" link at the top right of the screen to create a new group. The following screen will appear:

The screenshot shows the LOBBYGUARD web interface for adding a new group. The page title is "LOBBYGUARD Sign In. Sign Out. Secure." The navigation menu includes "Visitors", "Reports", "Registered Visitors", "Scheduled Activities", "Time & Attendance", "Rules", and "Administration". The "Visitors" tab is active, and the "Events" sub-tab is selected. The "Group Information" section contains the following fields:

- Group Name:
- Station:
- Visitor Type:
- Reason For Visit:
- Person Being Visited:
- Privileges:
- Arrival:

The "Notes" section features a rich text editor with a toolbar containing icons for bold, italic, underline, link, unlink, list, and style. The editor is currently empty. At the bottom of the form are "Save Group" and "Cancel" buttons.

Enter the information in the fields provided and click the "Save Group" button to save the group. This will return you to the previous screen with your new group listed, similar to the previous illustration.

From the "select an action" drop down menu, select the "view/edit visitors" on the same row as the group you just created, then click the "go" link. This will provide an interface for adding the visitors to the group, as shown below:

The screenshot shows the LobbyGuard web application interface. At the top, there is a navigation menu with tabs for 'Visitors', 'Reports', 'Registered Visitors', 'Scheduled Activities', 'Time & Attendance', 'Rules', and 'Administration'. The 'Scheduled Activities' tab is currently selected. Below the navigation menu, there is a sub-menu with 'Visitors' and 'Events' tabs. The main content area displays the title 'Visitor list for group: ABC Corp Board Meeting'. Below this title, there are four input fields for 'First Name', 'Last Name', 'Company', and 'Email', each followed by a small 'x' icon to clear the field. Below the input fields is an 'Add Visitor' button. Below the button is a table with the following data:

First Name	Last Name	Company	Email			
John	Smith	LobbyGuard	John.Smith@LobbyGuard.com	<a href="#">print badge</a>	<a href="#">edit</a>	<a href="#">delete</a>
Lisa	Davis	LobbyGuard	Lisa.Davis@LobbyGuard.com	<a href="#">print badge</a>	<a href="#">edit</a>	<a href="#">delete</a>

Enter the information for each visitor. If you include the email address you will be able to send an email notification to the visitor. When you have filled in all the information, click "Add Visitor" and the visitor information will appear in the list at the bottom of the form. Click on the Scheduled Activities tab when all visitors have been added. The group now appears, with the number of visitors listed in the "# in Group" column. From the "select and action" drop down menu, select "generate notification" and then click the "go" link. The following screen will appear:

The screenshot displays the LobbyGuard web application interface. At the top, the logo and tagline 'LOBBYGUARD Sign In. Sign Out. Secure.' are visible. Below the logo is a navigation menu with tabs for 'Visitors', 'Reports', 'Registered Visitors', 'Scheduled Activities', 'Time & Attendance', 'Rules', and 'Administration'. The 'Scheduled Activities' tab is currently selected. In the top right corner, there are links for '(change password)' and 'logout'. The main content area shows an email notification with the following details:

**To:** John.Smith@LobbyGuard.com,Lisa.Davis@LobbyGuard.com,  
**From:** admin@lobbyguard.com  
**Subject:** Scheduled Visit Notification from  
**Message:** You have been scheduled through LobbyGuard with the following appointment. This email will assist you in signing in quickly and securely at your appointment location. The details of your appointment are as follows:

**WHO:** John Doe  
**WHEN:** Jul 22 09:00 AM  
**WHERE:** Assist RC Vista

Print out this email and bring it with you to your appointment. Scan the bar code in this email under the bar code scanner of the LobbyGuard kiosk at your appointment location. LobbyGuard will then walk you through the steps necessary to complete the sign-in process.

DO NOT respond to this email. If you have additional questions please contact the person you are scheduled to visit.

Below the text is a barcode with the ID 'SV000021' underneath it. At the bottom of the email content, there are two buttons: 'Print Notification' and 'Email Notification'.

This screen provides an overview of the email that will be delivered to the visitors in the group. Click the EMAIL NOTIFICATION link to send the notification via email to the visitors in the group. Click the PRINT NOTIFICATION link to print the email for these visitors to use if they arrive without the printed email.

The email discusses the capability to scan the included bar code in order to sign in. This feature is exclusive to the LobbyGuard Kiosk; for more information on the LobbyGuard Kiosk product visit [www.lobbyguard.com](http://www.lobbyguard.com).

### **Events**

The Events feature is only available for use with the LobbyGuard Kiosk product. For more information on the LobbyGuard Kiosk please visit [www.lobbyguard.com](http://www.lobbyguard.com).

## Time and Attendance

In addition to managing visitors and recording visitor activity in your facility, LobbyGuard also serves as an excellent method for tracking time, attendance, and hours worked by employees and contractors in your facility. These individuals can sign in to LobbyGuard Assist when entering the building and sign out when leaving. Using this data you can run a Time and Attendance report to show the hours that an employee was in the building for a given date range, including a total of the hours for the entire range; see the section labeled "[Reports](#)" for more information on this report.

In order to obtain accurate hours reporting, it is important that the employee sign in and out when entering and leaving the building. In the event this is not done correctly (for example, someone arrives at 8:00 but does not sign in until 9:00), the Time and Attendance tab provides an interface for modifying the time of sign-in and sign-out, or for the creation of a new sign-in/sign-out record. Clicking on the Time and Attendance interface displays the following:

The screenshot shows the LobbyGuard web interface. At the top, the logo and tagline "LOBBYGUARD Sign In. Sign Out. Secure." are visible. Below the logo is a navigation menu with tabs for "Visitors", "Reports", "Registered Visitors", "Scheduled Activities", "Time & Attendance" (which is selected), "Rules", and "Administration". There are also links for "(change password)" and "(logout)".

The main content area features a search form on the left with the following fields:

- Visitor Type:
- Name:
- From:  To:
- A "Show Activity" button.

Below the search form, a red message states "Displaying 2 records matching your criteria." Below this, the user information is shown: "NAME: JASON MILNE TYPE: Visitor".

The main data is presented in a table with the following columns: "Time-In", "Time-Out", "Station", "Duration", "edit", and "delete".

Time-In	Time-Out	Station	Duration	edit	delete
7/14/2010 1:41:32 PM	7/14/2010 1:54:05 PM	FRONT OFFICE	0 hours 12 minutes	edit	delete
7/14/2010 2:01:54 PM	7/14/2010 2:10:54 PM	FRONT OFFICE	0 hours 9 minutes	edit	delete

At the bottom of the table, a summary row shows "Total Time: 0 hours 21 minutes".

The top left section of the page provides an area for selecting the individual whose time and attendance records you wish to view or edit.

Only the records of those individuals who are registered and use a LobbyGuard Frequent Visitor Keytag or stick on bar code when signing in and signing out can be modified through this interface; see the section labeled "[Registered Visitors](#)" for more information on how to register a visitor. Select the visitor type of the individual whose records you wish to review, then select the individual's name from the "Name" drop-down menu. The last step is to select the date range of records you wish to review. Click the "Show Activity" button and you will be presented with a list of sign in/sign out records for this individual during the selected date range. The list has the following column headers:

- **Time In** – Displays the time and date of sign in.
- **Time Out** – Displays the time and date of sign out.
- **Station** – Displays the name of the station used for sign in.
- **Duration** – Displays how long the individual was in the building. This is the difference between the Time In and the Time Out.

To modify a record click the "edit" link located on the right side of the record. Doing so will display the drop-down edit box, as show below:

The screenshot shows the LobbyGuard web interface. At the top, the logo and tagline "Sign In. Sign Out. Secure." are visible. Below the logo is a navigation menu with tabs for "Visitors", "Reports", "Registered Visitors", "Scheduled Activities", "Time & Attendance" (which is selected), "Rules", and "Administration". There are also links for "[change password]" and "[logout]".

The main content area features a search filter box with the following fields:  
- Visitor Type: Visitor  
- Name: JASON MILNE  
- From: 6/1/2010  
- To: 8/21/2010  
- Show Activity button

Below the filter box, a message states "Displaying 2 records matching your criteria." The records are displayed in a table with the following columns: Time-In, Time-Out, Station, Duration, and actions (edit, delete). The first record is for 7/14/2010 at 1:41:32 PM, and the second is for 7/14/2010 at 1:54:05 PM, both at the FRONT OFFICE station with a duration of 0 hours 12 minutes.

An edit modal is open for the first record, showing fields for Time-In (7/14/2010, 1:41 PM), Time-Out (7/14/2010, 1:54 PM), and Station (Assist RC Vista). It includes OK and Cancel buttons.

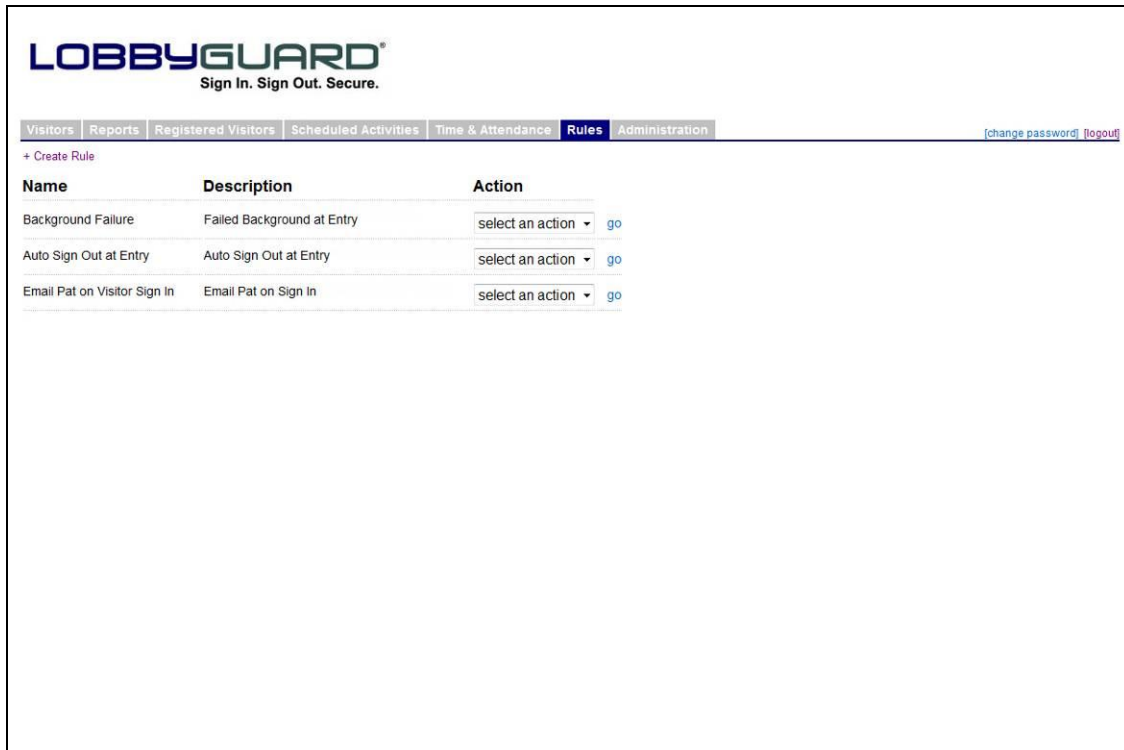
Change the Time-In date/time and/or the Time-Out date/time as needed. You may also change the station from which the visitor signed in. Press OK to submit the changes. A new Duration will appear in the record to indicate the change in time spent in the building, and a new Total Time will appear at the bottom of the list of records to indicate the change in total time in the building during the entire date range. If you wish to delete an entire record you may do so by clicking the "delete" link located on the far right side of the record.

Click the "Add New" link to add a new record. The new record will appear at the bottom of the records list with the date/time of sign in set by default to 8:00AM on today's date, and the date/time of sign out set by default to 5:00PM on today's date. Edit the record to reflect the appropriate dates/times as needed.

## Rules

The Rules tab is a powerful tool that is used to associate one or more “actions” with certain “trigger events” in LobbyGuard. For example, you can create a rule that tells lobbyguard to sign out all visitors (the action) at 3:00PM (the trigger event). You might also create a rule that notifies security personnel via email and cell phone text message (the action) when a visitors fails the background check in LobbyGuard (the trigger event).

Clicking on the Rules tab displays the Name, Description, and the Action options of rules that have been created, as shown below:



The screenshot displays the LobbyGuard web interface. At the top, the logo and tagline 'LOBBYGUARD Sign In. Sign Out. Secure.' are visible. Below the logo is a navigation menu with tabs for 'Visitors', 'Reports', 'Registered Visitors', 'Scheduled Activities', 'Time & Attendance', 'Rules', and 'Administration'. The 'Rules' tab is currently selected. To the right of the navigation menu are links for '[change password]' and '[logout]'. Below the navigation menu is a '+ Create Rule' link. The main content area contains a table with three columns: 'Name', 'Description', and 'Action'. The table lists three rules:

Name	Description	Action
Background Failure	Failed Background at Entry	select an action go
Auto Sign Out at Entry	Auto Sign Out at Entry	select an action go
Email Pat on Visitor Sign In	Email Pat on Sign In	select an action go

Follow these steps to create a Rule in LobbyGuard:

1. **Click the “+ Create Rule” link located above the “Name” column.** You will see the Create New LobbyGuard Rule screen as shown below:

The screenshot shows the 'Create New LobbyGuard Rule' form in the LobbyGuard web application. The form is titled 'Create New LobbyGuard Rule' and is located under the 'Administration' tab. It contains the following fields and options:

- Name:** A text input field.
- Description:** A text input field.
- Trigger:** A dropdown menu with the option 'Select a Trigger Event'.
- Station:** A list box containing the following options: FRONT OFFICE, MAIN LOBBY, MAIN ENTRANCE, SERVICE ENTRANCE, and BACK LOBBY.
- Actions:** A section with five checkboxes and corresponding text input fields:
  - Email
  - Text Message
  - Sign Out All Visitors
  - Power Down Kiosk and/or Assist Station
  - Execute HTTP Command
- Buttons:** 'OK' and 'Cancel' buttons at the bottom.

- 2. Give this rule a name and a description.** This information is displayed in the Rules tab view (see above) as a means of describing this rule from a top-level perspective. For example, you might name the rule "Email on Sign-In" and the description might read "Email John Smith when a visitor signs in".
- 3. Select the Trigger Event.** This is the event in LobbyGuard that will trigger this rule. The following events are available:
  - Failed Background Check – this occurs when a visitor signs in and fails the background check. For more information on background checking please see the section labeled "[LobbyGuard Assist Background Checking](#)" above.
  - Time of Day – you can set a rule to execute at a certain time of day with this trigger event.
  - Sign-In Completed – the rule will trigger when a visitor completes the sign-in process.
  - Sign-In Started – the rule will trigger the moment the sign-in process is initiated. This trigger event is only available to the LobbyGuard Kiosk product. For more information on the

LobbyGuard Kiosk please visit [www.lobbyguard.com](http://www.lobbyguard.com).

4. **Choose the station(s) to which this rule should apply.** In the "Station" section you will see all installations of LobbyGuard in your domain. Select the station that will make use of this rule by clicking on the name in the list. To add or remove stations, hold down the Ctrl button on your keyboard while clicking on the station names.
  
5. **Select the Action(s) that should take place when the Trigger Event occurs.** The following actions are available; you can choose as many actions as you like for this rule. Click the checkbox to the left of the desired action(s):
  - Email – this action will send an email to the list of recipients you enter.
  
  - Text Message – this action will send a text message to the list of phones you enter. You will be provided with an interface to enter the 10-digit phone number and the carrier. If you do not know the carrier or if the carrier is not listed you can still send a text message to any recipient via the Email action. To do this you will need to know the email address of the phone; this information is readily available through your carrier. Contact the carrier for more information.
  
  - Sign Out All Visitors – this action will sign all visitors out of the building.
  
  - Power Down Kiosk and/or Assist Station – this action will power down the LobbyGuard Assist software.
  
  - Execute HTTP Command – this action will execute an HTTP command of your choice. This is useful for sending commands to IP devices such as security cameras and alarm systems.
  
6. **Click the OK button.** Your new rule will be saved and displayed when you click the "Rules" tab.

## Administration

The Administration tab provides you with the tools you need to customize the workflow of the station for your visitors. The Administration section appears as follows:

The screenshot displays the LobbyGuard Administration interface. At the top, the LobbyGuard logo and tagline 'Sign In. Sign Out. Secure.' are visible. Below the logo is a navigation menu with tabs for Visitors, Reports, Registered Visitors, Scheduled Activities, Time & Attendance, Rules, and Administration (which is currently selected). A secondary menu under Administration includes Workflow, Reasons For Visit, Stations, Red Flag, User Manager, Background Checking, and Database Management. On the right side of the navigation bar, there are links for 'change password' and 'logout'. The main content area is titled 'Workflow for Visitor Types' and contains a red warning message: '\*\*\*\* Any changes made to the workflow will not be reflected in the kiosk/assist software until it is restarted. \*\*\*\*'. The interface is divided into two columns: 'Visitor Types' and 'Employee'. The 'Visitor Types' column has a search box and an 'add new' button, followed by a list of visitor types: Visitor, Employee, Volunteer, and Contractor, each with 'edit' and 'delete' links. The 'Employee' column contains a list of checkboxes for workflow settings, including 'Accept the following terms:', 'Request Visitor's Photo', 'Request Visitor's Company', 'Request Visitor's drivers license' (with sub-options for saving license info and scanning front/back), 'Require license scan in order to proceed' (radio buttons), 'Perform Background Check', 'Request Visitor's reason for visiting', 'Request the name of the person to be visited', and 'Print a Visitor badge' (with a dropdown menu). At the bottom, there is a 'Language Translations' section with a 'Spanish' dropdown and a 'save' button.

The Administration Workflow tab contains the following sections:

### **Workflow**

The Workflow section contains the two most important LobbyGuard Assist customization features: *visitor types* and *workflow* settings. Visitor Types are the foundation for the sign-in process with LobbyGuard Assist. During the sign-in process, the front desk personnel will choose from the selection of visitor types and will enter required information about the visitor according to the workflow. For example, you might create a visitor type called "Guest" that requires the visitor to have his or her driver's license scanned and run a background check on that visitor, whereas you might create another

visitor type called "Employee" that simply takes a photograph of the employee and nothing more. Using visitor types also makes for more accurate reporting: you can run a report displaying the number of "Guests" who entered your building in a given time frame, etc. For more information on visitor types and how they appear in LobbyGuard Assist see the section above labeled "[Signing In](#)".

The visitor types are displayed on the left side of the screen. Some common visitor types are visitor, employee, contractor, vendor, parent, student, etc. You can create as many visitor types as you like and give them any description you wish. To add a new visitor type, simply enter the description of the visitor type in the text box located just above the list of current visitor types and click "add new". The new visitor type will appear in the list on the left side of the screen.

The next step is to create a *workflow* for anyone who signs in as this new visitor type. Click on the link labeled "edit" located to the right of the new visitor type. The visitor type will appear on the right side of the screen, above the workflow checkboxes. Each checkbox corresponds to a question or action that takes place during sign-in and sign out. Check the boxes that correspond to the questions you'd like to ask of this visitor type as they sign-in. The following is a description of each workflow option; screenshots for these steps as they appear on the screen are available at the [Launching the LobbyGuard Assist Software](#) section:

- **Accept the following terms:** - The "Terms" feature is only available to the LobbyGuard Kiosk product. For more information on the LobbyGuard Kiosk please visit <http://www.lobbyguard.com/>.
- **Request Visitor's Photo** – This option will require a photograph of the visitor during sign-in.
- **Request Visitor's Company** – This option will require the name of the visitor's Company to be entered during sign-in.
- **Request Visitor's Driver License** – If this option is checked, the software will require a scan of the visitor's license during sign-in. LobbyGuard will store an image of the driver license as a part of the visitor record. In addition, the visitor's name, address, date of birth and other information will be extracted from the license and used to

populate the LobbyGuard Assist sign-in screen, saving time of manually entering this information.

The following additional options are made available for driver license scanning:

- **Save Driver License Info** – If this option is checked, LobbyGuard will save an image of the visitor’s driver license as part of the visitor record. If it is not checked, the driver license image will not be stored as part of the visitor record or captured in any way to the LobbyGuard database. This can be used in information-sensitive environments to limit the amount of information being stored about each visitor.
- **Scan front of drivers license** – If this option is checked, LobbyGuard software will require a scan of the front of the drivers license. For more information on license scanning see [Appendix K: Scanning a Driver License in LobbyGuard Assist](#).
- **Scan back of drivers license** - If this option is checked, LobbyGuard software will require a scan of the back of the drivers license. For more information on license scanning see [Appendix K: Scanning a Driver License in LobbyGuard Assist](#).
- **Use license photo on visitor badge** - If this option is checked, LobbyGuard Assist will use the license photo on the drivers license as the photo for the visitor badge.

**IMPORTANT**  
**Refer to your local laws and regulations before storing images of personal IDs in your LobbyGuard database**

- **“Require license scan in order to proceed” and “Allow the visitor to bypass the license scan”**. Choosing the latter will allow a visitor to sign-in without a driver license scan. This gives visitors who do not wish or do not have a license the ability to sign in to the building. Choosing to require the license scan will require the visitor to provide their license for scanning in order to proceed with the sign in process.

- **Perform Background Check** – This option will compare information obtained during visitor sign-in to the LobbyGuard background data services. For information on how background checking works in LobbyGuard, see the section labeled [LobbyGuard Assist Background Checking](#).
- **Request Visitor’s Reason for Visiting** – If this option is checked, visitors will need to provide the reason for their visit. A selection will be made from the choices listed in the “Reasons” section of the LobbyGuard Assist software. For more information on setting up the list of Reasons in LobbyGuard Assist see the section below labeled [“Reason for Visit”](#).
- **Request the Name of the Person to be Visited** – This option will require the visitor to provide the name of the person he or she is visiting.
- **Print a Visitor Badge** – When this option is selected, LobbyGuard Assist will print a visitor badge for the visitor. The drop-down menu located to the right of this option allows you to select different formats for the badge. For more information on the LobbyGuard visitor badge and visitor badge formats see [Appendix L: The LobbyGuard Visitor Badge](#)
- **Language Translations** – The language translation features located in the LobbyGuard Administrative Utility are only available for the LobbyGuard Kiosk product. For more information on the LobbyGuard Kiosk product please visit <http://www.lobbyguard.com/>.

### Reason for Visit

This section allows you to set up the choices regarding the visitor's reason for visiting your building. The screen appears as follows:

**LOBBYGUARD**  
Sign In. Sign Out. Secure.

Visitors | Reports | Registered Visitors | Scheduled Activities | Time & Attendance | Rules | Administration [change password] [logout]

Workflow | Reasons For Visit | Stations | Red Flag | User Manager | Background Checking | Database Management

Reasons for Visit: Contractor

Top Level

English	Spanish	Sort Order		
Attending a Meeting		0	edit	delete
Drop off order		0	edit	delete
Provide an Estimate		0	edit	delete
Work		0	edit	delete

Add Reason for Visit

These choices are made available if a visitor type has the option "Request Visitor's Reason for Visiting" selected in the workflow. See the section labeled "[Workflow](#)" for more information.

The first step in creating these reasons is to select a visitor type from the drop-down menu which is located to the right of the "Reasons for Visit" label. This menu consists of all the visitor types that have "Request Visitor's Reason for Visiting" selected in the Workflow. Each visitor type can have its own unique set of choices; for example, the reasons you may want to provide to a visitor type called "Contractor" may be different from the reasons you would provide for a visitor type called "Parent".

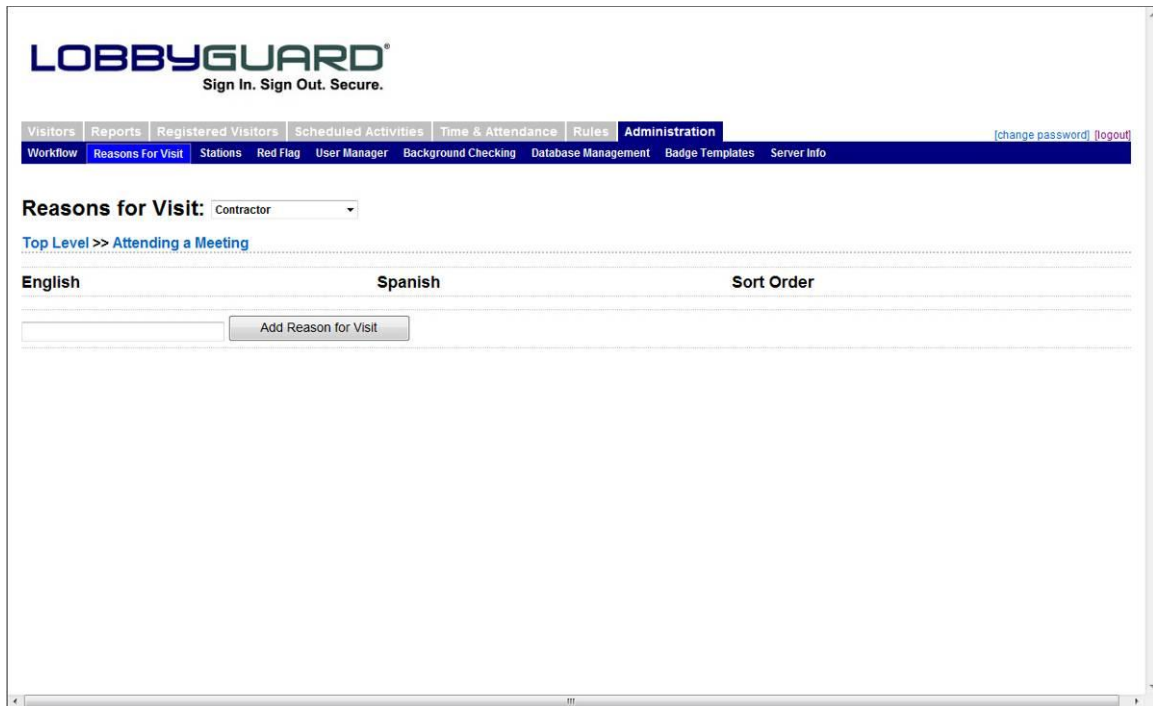
To create a reason, enter the description of the reason in the text box located at the bottom of the screen and click the button labeled "Add Reason for Visit". You can create as many reasons as you wish in this

fashion.

Once you have created a reason you can modify certain aspects of the reason by clicking the "Edit" link located to the right of the reason:

- You can change the description of the reason under the "English" column.
- The "Spanish" column allows for the creation of the Spanish translation for this reason for visit. This feature is only applicable to the LobbyGuard Kiosk product. For more information on the LobbyGuard Kiosk please visit [www.lobbyguard.com](http://www.lobbyguard.com).
- You can set the sort order by entering a number that represents the order in which you wish the reason to be displayed under the Sort Order column. Click the link labeled "save" to save these changes.

Another feature of Reasons for Visit is the ability to create multi-tiered reasons, which allows for a more detailed record of why the visitor is visiting and can be useful for creating reports that are more refined. To create multi-tiered reasons simply click on the description of the reason under the "English" column; this description is hyperlinked and will provide a blank screen similar to the following:



In this example, the reason "Attending a Meeting" was clicked; this is indicated by the hyperlinked trail displayed as "Top Level >> Attending a Meeting". You are now able to create additional reasons under "Attending a Meeting". For example, you might create "1<sup>st</sup> Floor", "2<sup>nd</sup> Floor" and "3<sup>rd</sup> Floor". These new reasons will be visible when the "Attending a Meeting" reason on the LobbyGuard Assist software is selected.

Click the "Top Level" link to return to the top level view of your reasons.

## Stations

Click on the stations section and you will see a screen similar to the following:

**LOBBYGUARD**  
Sign In. Sign Out. Secure.

Visitors | Reports | Registered Visitors | Scheduled Activities | Time & Attendance | Rules | **Administration** | [\[change password\]](#) | [\[logout\]](#)

Workflow | Reasons For Visit | Stations | Red Flag | User Manager | Background Checking | Database Management

**Edit Settings for the Following LobbyGuard Station:** Front Desk

\*\*\*\* Any changes made for a station will not be reflected in the kiosk/assist software until it is restarted. \*\*\*\*

**Properties for Station ID: 18f1cb95-8b5e-4ff7-8799-a7fcd95fee4**

Name: Front Desk

Location: Front Desk

Background Color: White

Installed Devices:

- Badge Printer
- Barcode Scanner
- Drivers License Scanner
- Web Cam

Languages:

- English
- Spanish

Supported Visitor Types:

- Visitor
- Employee
- Volunteer
- Contractor
- background checking

Mode:

- Normal
- Event Front Desk

Control Panel Password: .....

Proxy Info:

- Use Proxy?
- Address:
- Username:
- Password:

Messaging:

- Use Lobbyguard Messaging Services
- Use a specified SMTP Server

Admin Email: admin@lobbyguard.com

The Stations section provides the following administrative functions for your LobbyGuard Assist software. **The items marked with an "\*" are settings that require a restart of the LobbyGuard Assist software in order for any changes to take effect:**

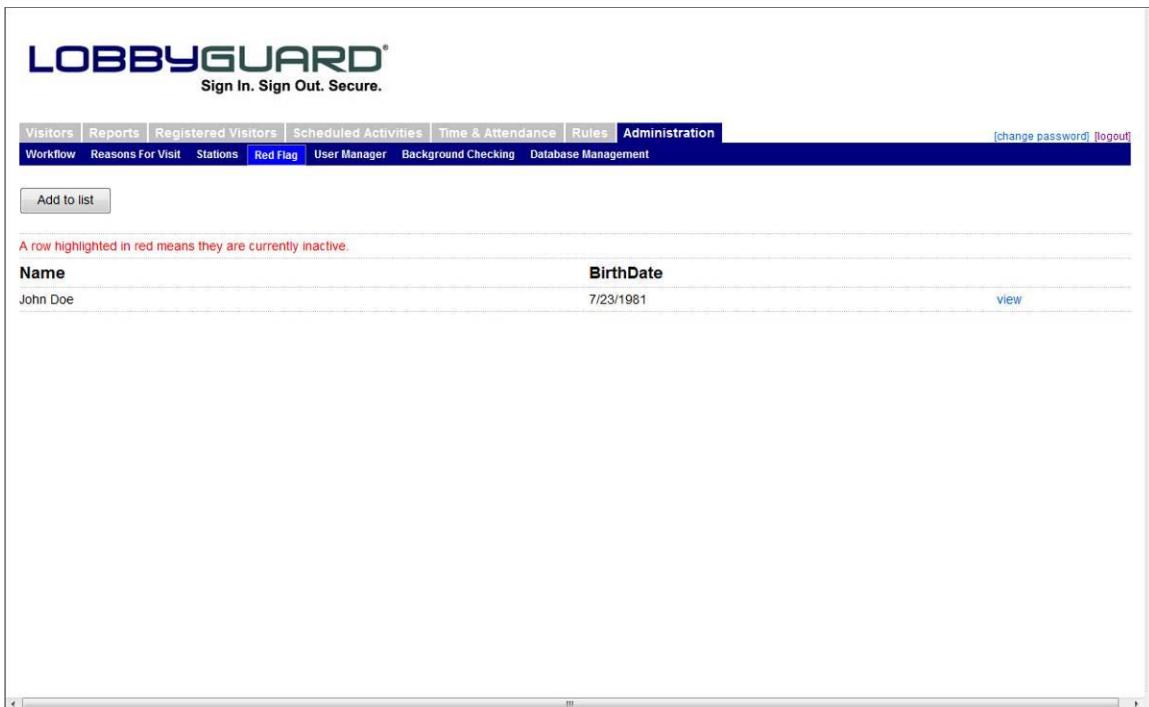
- **Edit Settings for the Following LobbyGuard Station -** Provides a listing of all the stations available; every LobbyGuard installation in your domain is displayed in this list. Select the station you wish to administer from this menu before proceeding.
- **Properties for Station ID -** Shows the unique ID given to this station. This ID is not editable but may be required for LobbyGuard support reasons.
- **Name -** The name of this station for the purpose of the visitor records in the visitor logs. Each visitor has the name of the station from which they signed in and out as part of his or her record in the LobbyGuard database.
- **Location -** A description of the physical location of the station. This is useful if you are administering a large number of LobbyGuard installations.
- **Background Color -** This feature is only available for use with the LobbyGuard Kiosk. For more information on the LobbyGuard Kiosk please visit <http://www.lobbyguard.com/>.
- **Installed Devices\*** - Allows you to enable and disable certain hardware components for your installation of LobbyGuard. This is used in the event of a hardware repair and for future use as optional hardware components become available. Each hardware device you plan to use with your installation of LobbyGuard Assist should be selected in this section.
- **Languages\*** - This feature is only available for use with the LobbyGuard Kiosk. For more information on the LobbyGuard Kiosk please visit <http://www.lobbyguard.com/>.

- **Supported Visitor Types\*** - Displays each visitor type created in the Workflow section. The selected visitor types will be displayed on the LobbyGuard Assist software to choose from during sign in, and those that are not checked are hidden from view. If you have created new workflows you will need to enable them here in order to see them as an option within LobbyGuard Assist.
- **Mode** – This feature is only available for use with the LobbyGuard Kiosk. For more information on the LobbyGuard Kiosk please visit <http://www.lobbyguard.com/>.
- **Control Panel Password\*** - This feature is only available for use with the LobbyGuard Kiosk. For more information on the LobbyGuard Kiosk please visit <http://www.lobbyguard.com/>.
- **Proxy Info** - Provides an interface for entering any proxy server credentials that may be needed by the station to send messages from the station or access the internet. The address format for the proxy server should be <http://xx.xx.xx.xx:port/>. The station must be restarted if the proxy settings on the network are changed from those stored in LobbyGuard.
- **Messaging\*** - Sets the SMTP (mail) server from which background failure notification emails and cell phone text messages are delivered. Using the LobbyGuard messaging service will route the message through the mail servers that are made available by LobbyGuard Solutions, LLC for this purpose. You may choose a different server by selecting "Use a specified SMTP Server" and entering the IP address or "friendly name" of the SMTP server.
- **Admin Email \***- This feature is only available for use with the LobbyGuard Kiosk. For more information on the LobbyGuard Kiosk please visit <http://www.lobbyguard.com/>.

After making any changes to this page you must click the button labeled "Update General Settings" for your settings to take effect.

## Red Flag

This section provides the ability to add records against which your visitors will be checked during sign-in, provided the visitor type has "Perform Background Check" enabled in the workflow. If a visitor matches a record in your Red Flag list, a notification message will display once the "Submit" button is pressed informing the front desk personnel that this visitor is on the Red Flag list (see the section labeled "[LobbyGuard Assist Background Checking](#)" above for more information). This is useful if there are individuals that you do not wish to allow entry into your building, including ex-employees, custody disputes, etc.



The screenshot shows the LobbyGuard web application interface. At the top, the logo "LOBBYGUARD" and tagline "Sign In. Sign Out. Secure." are visible. Below the logo is a navigation menu with tabs for "Visitors", "Reports", "Registered Visitors", "Scheduled Activities", "Time & Attendance", "Rules", and "Administration". The "Administration" tab is selected, and a sub-menu is open showing "Workflow", "Reasons For Visit", "Stations", "Red Flag", "User Manager", "Background Checking", and "Database Management". The "Red Flag" sub-tab is active. Below the navigation is an "Add to list" button. A message states: "A row highlighted in red means they are currently inactive." Below this is a table with two columns: "Name" and "BirthDate". The table contains one row with the name "John Doe" and birth date "7/23/1981". A "view" link is present at the end of the row.

Name	BirthDate	
John Doe	7/23/1981	<a href="#">view</a>

The Red Flag screen displays all the current red flag entries for your domain. Click on the Add to List button to add a new record; the following screen will be displayed:

**LOBBYGUARD**  
Sign In. Sign Out. Secure.

Visitors | Reports | Registered Visitors | Scheduled Activities | Time & Attendance | Rules | Administration [change password] [logout]  
Workflow | Reasons For Visit | Stations | Red Flag | User Manager | Background Checking | Database Management

### Red Flag

\* First Name:   
\* Last Name:   
Date of Birth:

Notes:

Status:  Active  
Photo: No Photo on file.

Enter as much information as possible to the record to make matching as accurate as possible during visitor sign-in. First and Last Name are required field. The "Active" check box will enable or disable this person's record from the background check.

When you have completed the entry, click the ADD button to add this new record to your Red Flag list. Entries made to the Red Flag List are applicable to all LobbyGuard Assist or LobbyGuard Kiosk installations on your domain.

## User Manager

The User Manager is used to add / edit / delete user accounts for those users who need to gain access to the Administrative Utility.

**LOBBYGUARD**  
Sign In. Sign Out. Secure.

Visitors | Reports | Registered Visitors | Scheduled Activities | Time & Attendance | Rules | **Administration** [change password] [logout]

Workflow | Reasons For Visit | Stations | Red Flag | **User Manager** | Background Checking | Database Management

**Add User**

Email:

First Name:

Last Name:

Password:

Confirm Password:

Account Rights:

- Visitors
- Reports
- Administration
- Scheduled Visitors
- Registered Visitors
- Time and Attendance
- Offender Search
- Rules

Station Rights:

- FRONT OFFICE
- MAIN LOBBY
- MAIN ENTRANCE
- SERVICE ENTRANCE
- BACK LOBBY

**Current Users**

admin	admin	admin@lobbyguard.com	edit	delete
-------	-------	----------------------	------	--------

The default account [admin@lobbyguard.com](mailto:admin@lobbyguard.com) is listed on the right. To create a new account, enter the information in the fields on the left. The Account Rights section contains check boxes, each of which corresponds to a tab on the Administrative Utility interface. This provides user-level rights with regards to accessing various areas of the software; if you are creating a user account for a user who does not need access to the Administration tab, leave that box unchecked. When that user signs in, the Administration tab will not be visible.

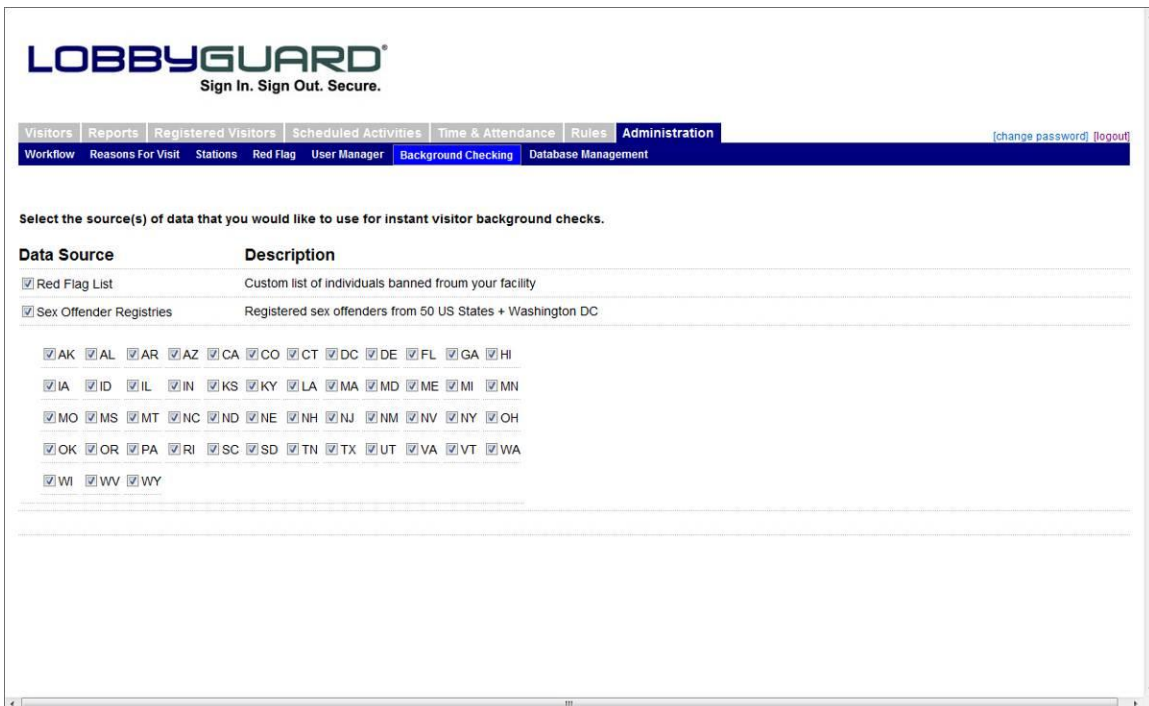
The Station Rights section contains a list of all the LobbyGuard installations in your domain. You can turn off access to an entire station for a given user account by leaving the box next to that station unchecked. Each user account should have at least one station checked; or else that account will have no access to any data.

User accounts are listed on the right side of the screen. Click the “edit” link to edit an existing account, or click the “delete” link to delete an account.

### **Background Checking**

This section provides features to customize what background sources will be used when performing instant background checks on visitors. See the section labeled “[Workflow](#)” for further information on turning background checking on / off for your visitors.

Clicking on the Background Checking tab will display the following:



Under the heading “Data Source” are listings for the two sources that are available for background checking of visitors: the database of registered sex offenders in the United States and the Red Flag list. The sex offender database consists of 600,000+ registered offenders in all 50 US states and Washington, DC. The Red Flag list consists of any individuals added to your list; see the section labeled “[Red Flag](#)” for more information. You can enable either source by checking the box located to the left of each source. When the “Sex Offender Registries” data source is selected, additional options are made

available at the bottom of the screen. These choices represent the 50 US states and Washington, DC.

### ***Database Management***

This section of the Administration tab provides features to purge data records from your LobbyGuard database. Clicking on this section will display the following:

The screenshot shows the LobbyGuard Administration interface. At the top, the LobbyGuard logo and tagline "Sign In. Sign Out. Secure." are displayed. Below the logo is a navigation menu with tabs for Visitors, Reports, Registered Visitors, Scheduled Activities, Time & Attendance, Rules, and Administration. The Administration tab is selected, and a sub-menu is open showing options like Workflow, Reasons For Visit, Stations, Red Flag, User Manager, Background Checking, and Database Management. The Database Management section is active, displaying the text "Number of Unregistered Visitor Records: 47". Below this, there is a section titled "Purge Visitor Records (Includes Visitor Info and Visitor License Info. Will not delete Registered Visitors)". This section contains two dropdown menus: "Purge visits up to and including this date:" with the value "8/6/2010" selected, and "Purge from Station:" with the value "--- All Stations ---" selected. A "Purge Records" button is located below the second dropdown menu.

The top of the screen displays the "Number of Unregistered Visitors". This number is the total of all visitors currently in your visitor logs, including visitors in the Signed In, Signed Out, and Failed Background logs. This number does not include any Registered Visitor sign-ins in your database; for more information on Registered Visitors see the section above labeled "[Registered Visitors](#)". Select a date from the "Purge visits up to and including this date" to indicate the date threshold from this purge; select a station from the "Purge from Station" to indicate which station's records should be purged. Click on the "Purge Records" button to initiate the purge; all visitor log records dated on or before your selected date and were signed in from the selected station will be deleted.

The purge feature is an effective way to manage database size and visitor log growth. It is important to note the following before using this feature:

- Purged records are permanently deleted and cannot be retrieved. Be certain you will no longer need these records before running a purge.
- Database size is not a concern for LobbyGuard Assist environments. The LobbyGuard Assist database is hosted on the secure LobbyGuard database server where customers are provided unlimited data storage. The purge feature is most useful for multi-station installations that are sharing a common database and are adding hundreds or thousands of records each day and where internal policies and procedures call for the removal of visitor records.

# Appendices

## Appendix A: Supplies

### *Visitor Badges, Frequent Visitor Passes and Other Items*

LobbyGuard Solutions, LLC is proud to offer additional rolls of blank visitor badges as well as LobbyGuard Frequent Visitor Pass key tags and other LobbyGuard supplies. The LobbyGuard visitor badges are pre-printed with the LobbyGuard logo in color on each badge and are available in seven different colors. This color logo serves as an extra measure of security, ensuring that the visitor badge was not created elsewhere for the purposes of gaining entry to your facility. Changing your badges to a new color each day means visitors won't be able to wear the yesterday's badge to gain entry to your facility.



### *Ordering instructions and resources*

To view the latest supplies available for LobbyGuard and to access online ordering instructions please visit:

<http://www.lobbyguard.com/supplies>

Or call toll-free (866) 905-6229 option 3

## **Appendix B: Recommended Policies**

### ***Data Backup***

Your LobbyGuard Assist software data is hosted on secure LobbyGuard servers that are backed up on a daily basis.

### ***Power***

Your LobbyGuard Assist software and hardware is designed to safely run 24/7 if needed. To shut down LobbyGuard simply close the visitor sign-in screen.

### ***Antivirus, Firewall and Windows Update Policies***

Your LobbyGuard Assist software does not have any antivirus installed. It is your responsibility to install the antivirus package used within your organization and to follow the normal procedures for firewall protection, Windows updates and other measures afforded to any new PC added to your internal network. Please consult your Information Technology staff regarding these issues.

## Appendix C: Troubleshooting & Contacting Tech Support

LobbyGuard provides a full array of technical support options and troubleshooting steps at the following URL:

<http://www.lobbyguard.com/support>

**Please refer to this page before calling LobbyGuard Technical Support as it supplies the quickest answers to most common support issues.**

## **Appendix D: Keeping Current with the Latest Versions**

It is important to keep your LobbyGuard Assist product up-to-date with the latest version of the LobbyGuard software. New versions and updates to the LobbyGuard software are released regularly by LobbyGuard Solutions, LLC. In order to maintain your software and keep it as up-to-date as possible, you will need a current LobbyGuard Support and Hosted Contract. This contract provides you with 12 months of ongoing updates, technical support and access to LobbyGuard Background Checking Services. If you need information on the status of your contract or would like to renew immediately, send your request to [support@lobbyguard.com](mailto:support@lobbyguard.com) and you will receive the requested information.

LobbyGuard Assist will automatically check for updates on product launch. For complete information on this process refer to the section above labeled "[Launching the LobbyGuard Assist Software](#)".

## **Appendix E: On-Site Installation, Support and Training**

Installation and Training of LobbyGuard Assist is provided through this user guide and the LobbyGuard Assist Installation Guide. For information on purchasing optional on-site installation and training please contact [info@lobbyguard.com](mailto:info@lobbyguard.com).

## **Appendix F: Contacting LobbyGuard Solutions, LLC**

LobbyGuard Solutions, LLC is the Raleigh, NC-based manufacturer of the LobbyGuard hardware and software. LobbyGuard Solutions also handles all support requests for the product and provides ongoing updates and maintenance to all LobbyGuard products.

### **Web Site:**

The LobbyGuard web site contains answers to common questions, information on updates and other useful information on the LobbyGuard product. Please visit our site at the following URL:

<http://www.lobbyguard.com>

### **Sales:**

Including general and technical pre-sales questions, and purchase inquiries:

[sales@lobbyguard.com](mailto:sales@lobbyguard.com)

(866) 905-6229

(919) 785-3398 fax

### **Support:**

Questions from users of LobbyGuard.

[support@lobbyguard.com](mailto:support@lobbyguard.com),

via the form on the web site at [www.lobbyguard.com/support](http://www.lobbyguard.com/support),

or call toll-free M-F EST (US East Coast)

(866) 905-6229 option 2

### **Mailing Address:**

LobbyGuard Solutions, LLC  
4700 Six Forks Road Ste 300  
Raleigh NC 27609

## Appendix G: What's New

**NOTE TO USERS OF LOBBYGUARD ASSIST:** The completed User Guide for version 4.3 is due for completion on 3/18/2011. The Release Notes below provide a complete list of features that are immediately available with the 4.3 upgrade, which is available effective 3/10/2011. If you need assistance or training on these new features please contact [support@lobbyguard.com](mailto:support@lobbyguard.com)

### LobbyGuard Assist v4.3 Release Notes

The following new features were added to LobbyGuard Assist:

The following new features are available in **LobbyGuard v4.3**:

1. **Modifications to the LobbyGuard Assist Background Failure Screen**
  - a. **Added "Match" and "Not a Match" buttons** – When a visitor is submitted for sign-in and fails the background check in LobbyGuard Assist you are presented with the Background Failure screen. Two new buttons have been added to this screen: "Match" and "Not a Match"; these buttons take the place of the "Remove Match" button present in previous versions of LobbyGuard. The "Match" button should be selected when a positive match is verified, i.e. when the visitor is determined to actually match to an offender record. The "Not a Match" button should be selected in the event of a "false positive"; i.e. where the offender record and the visitor record are not the same person. If "Not a Match" is selected, the visitor record is automatically signed in and a visitor badge is printed for the visitor. This negates the need to resubmit the visitor record as per previous versions of LobbyGuard.
  - b. **Full Information provided for Offender Matches** – Added fields for Address, Height, Hair and Eyes for both the visitor and offender records. This additional information may be helpful in validating a background failure. Removed the hyperlink under the offender name that previously linked to the offender record on the relevant state web site where the offender is registered.

- c. **Removed the “Notify Security” Button** – In previous versions of LobbyGuard this button functioned to send notifications via email / text message in the event of a positive background match. Notification is now sent when the “Match” button is clicked for any record in the Background Failure screen.
  - d. **Red Flag Background Failures now appear in Background Failure Screen** - Visitors who fail against Red Flag List entries are now visible in the Background Failure screen, same as visitors who fail against the National Sex Offender entries, including the new “Match” and “Not a Match” buttons as detailed above. Red Flag List entries in the Background Failure screen also display any notes associated with the Red Flag record.
  - e. **Added Graphic Indicator for Match Types** – Red Flag entries and National Sex Offender entries in the Background Failure screen are delineated with icons and text to represent the two background sources.
2. **Keytag Scan will fully populate LobbyGuard Assist screen on sign-in** – When a registered keytag is scanned it will now fully populate the LobbyGuard Assist form with the visitor name, photo, driver license information and driver license image.
3. **Use of an expired keytag now a trigger event in the “Rules” tab** – It is now possible to create a LobbyGuard rule triggered by the scanning of an expired keytag. For example, a rule can be created to notify an administrator via email if someone attempts to sign in using a keytag that has expired.
4. **Visitor modification of name and/or date of birth added as trigger event under “Rules” tab (LobbyGuard Kiosk users only)** - It is now possible to create a LobbyGuard rule triggered when a visitor chooses to modify his or her name or date of birth during kiosk sign-in. For example, a rule can be created to notify an administrator via email if someone attempts to sign in and makes a modification to their name.
5. **Visitor records with modified name and/or date of birth appear in red in visitor log (LobbyGuard Kiosk users only)** – Visitors who chose to modify their name and/or date of birth during sign-in will appear in red text in the Signed In and Signed Out logs in the LobbyGuard Administrative Utility.
6. **Modifications to Red Flag List in the LobbyGuard Administrative Utility** – Added additional fields for Red Flag entries: Street Address,

City, State, ZIP, Height, Hair, eyes fields for Red Flag entries have been added. The “Active” checkbox has been removed, and the buttons “Update” changed to “Save”, “Remove” has been changed to “Cancel”. The location of the photo and Driver License photo has moved to the upper right corner of the Red Flag screen.

7. **Added “Match Audit” feature** – This feature is available under the “Administration” tab then choosing “Background Checking” then “Match Audit”. The Match Audit log is a list of visitors who failed background checks during sign-in; this includes visitors who were deemed to be actual matches to the offender, and those visitors who were “false positives” and were deemed to not be actual matches. The Match Audit log will display the date and time of the visit as well as the outcome (MATCH or NOT A MATCH) as determined at the time of visit. The visitor photo and the photo of the offender against whom the visitor was matched are also displayed in the Match Audit log.
8. **Corrected issue where the photo from the previous visitor license appeared on the visitor badge** – issue occurred for some users of LobbyGuard Assist if the second visitor did not scan a driver license and the customer was using license photo as the badge photo.
9. **No longer supporting 4” badges effective July 1 2011**– LobbyGuard will only support the use of the 4.5”L visitor badge effective 7/1/2011. Existing inventories of shorter badges should be used up prior to this date. If you are ordering your visitor badges from [www.lobbyguard.com/supplies](http://www.lobbyguard.com/supplies) or from an authorized LobbyGuard distributor, you are using the 4.5” badge and can disregard this notice. If you are ordering your badges elsewhere please contact [support@lobbyguard.com](mailto:support@lobbyguard.com) and we will provide additional assistance on this transition.

## **Appendix H: Multi-Station Networking**

One of the most useful features of LobbyGuard Assist is the ability to network multiple installations together, storing all your data in one location and providing you with the ability to retrieve data from multiple stations via the web-based LobbyGuard Administrative Utility. All installations of LobbyGuard Assist on the same domain are networked in this manner. Other LobbyGuard products, such as the LobbyGuard Kiosk, can also be networked to new or existing LobbyGuard Assist installations.

### **ADVANTAGES**

There are several advantages to networking your stations together:

- Visitors can sign in at one station and use the bar coded visitor badge to sign out from another.
- All visitor logs, administration, and reports can be accessed from one web interface.
- Individuals added to the “Red Flag List” will automatically be populated across all stations.
- Individuals who “register” with one station will be able to use their LobbyGuard keytag with any station on the network.

## **Appendix I: Legal Notice**

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## **Appendix J: Accessing LobbyGuard Administrative Utility**

The Administrative Utility can be accessed from any PC on the internet by visiting the following URL:

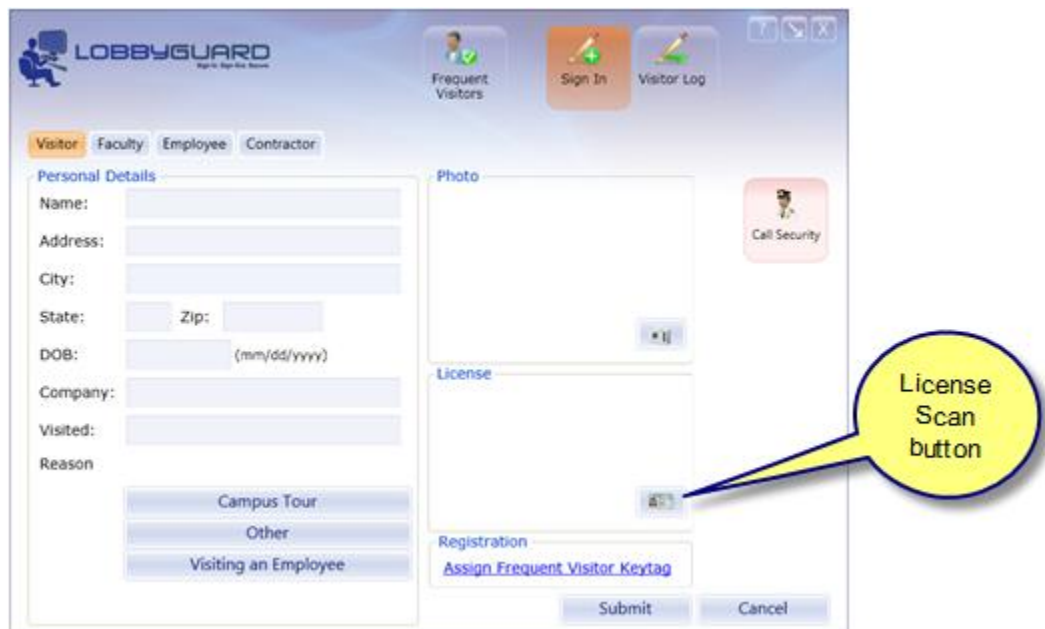
<http://admin.lobbyguard.com>

You will need credentials in the form of a domain, email address and password to log in. If you need assistance in this regard please contact [support@lobbyguard.com](mailto:support@lobbyguard.com).

## Appendix K: Scanning a Driver License in LobbyGuard Assist

Follow these steps to properly scan a license in LobbyGuard Assist:

1. **Determine which side of the license to scan** – LobbyGuard Assist supports the scanning of the front and/or the back of the drivers license. To determine which side you need to scan, look at the “License Scan” button, located in the bottom right portion of the screen inside the area labeled “License”:



The screenshot shows the LobbyGuard Assist web interface. At the top, there are navigation buttons for 'Frequent Visitors', 'Sign In', and 'Visitor Log'. Below that, there are tabs for 'Visitor', 'Faculty', 'Employee', and 'Contractor'. The main form area is titled 'Personal Details' and contains fields for Name, Address, City, State, Zip, DOB, Company, Visited, and Reason. There are also buttons for 'Campus Tour', 'Other', and 'Visiting an Employee'. On the right side, there is a 'Photo' section with a 'Call Security' button. Below the photo section is the 'License' section, which contains a 'License Scan' button. A yellow callout bubble points to this button with the text 'License Scan button'. At the bottom of the form, there are 'Submit' and 'Cancel' buttons.

You will see one or both of the following “License Scan” buttons:



*Scan front of license*



*Scan back of license*

2. **Determine which scanner you are using** – LobbyGuard Assist makes use of the following driver license scanners:



**SnapShell License Scanner** – this scanner is also used in the LobbyGuard Assist Station



**Scanshell License Scanner**

**3. Insert the License into the Scanner** – refer to the appropriate image below to insert the license properly:

To scan the *front* of the license with the *Scanshell* scanner:



Insert license face-down into the scanner and press the “Scan Front of License” button:



Apply slight forward pressure until the scanner begins to pull the license from your hand.

To scan the *back* of the license with the *Scanshell* scanner:



Insert license face-up into the scanner and press the “Scan Back of License” button:



Apply slight forward pressure until the scanner begins to pull the license from your hand.

To scan the *front* of the license with the *Snapshell* scanner:



Place the license face-down on the scanner and press the “Scan Front of License” button:



To scan the *back* of the license with the *Snapshell* scanner:



Place the license face-up on the scanner and press the “Scan Back of License” button:



If both buttons (scan front of license and scan back of license) are visible, follow the above instructions for each of the two buttons.

Once the license scan is complete, the license image should appear in the “License” section of the screen. For more information on

configuring license scanner settings see the section labeled "[Workflow](#)".

## Appendix L: The LobbyGuard Visitor Badge

The following are some of the key benefits of the LobbyGuard visitor badge. Badges may be purchased online at [www.lobbyguard.com/supplies](http://www.lobbyguard.com/supplies)



Available in 7 colors; change your badge roll each day for added security:

