

# **PassagePoint**

## **Administrative Manual**

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# 1

## Introduction

### What is PassagePoint?

PassagePoint visitor badging and lobby security software represents many years of pioneering product development. It was conceived to meet customer requests for computerized visitor logs and temporary visitor badges, and has evolved into the most comprehensive visitor management software available.

### How the Software Can be Used

- For signing in and badging walk-up visitors
- As an optional visitor self-registration station
- To pre-register individuals or groups
- For viewing and printing reports
- As an added security level

### Configuration Options

PassagePoint can be installed two ways: Networked, using Client and Server software; or on a single workstation, using the Standalone option. Both options are available on the installation CD.

## Greeting Visitors

How a company chooses to use PassagePoint to greet visitors and process each visit is largely based on their security policies, traffic volume and corporate philosophy. For this reason, PassagePoint can be used in various configurations. Listed below are the three most common configurations.

### **Configuration 1** - PassagePoint on Reception Computer Only

Receptionist enters visitor information into PassagePoint and prints visitor badge.

### **Configuration 2** - PassagePoint on Visitor Sign-in Station (Kiosk) Computer Only

Visitor enters information into PassagePoint (using Visitor Sign-in interface) and badge prints once all required fields are entered.

### **Configuration 3** - PassagePoint on Visitor and Reception Computer

Visitor enters information into PassagePoint (using Visitor Sign-in interface), the receptionist then verifies the information and/or makes changes at the receptionist's computer, and then prints the visitor badge.

PassagePoint allows you to use different configurations in different lobbies. For example, you may want to have the visitor sign-in station in a high-profile lobby, but have the receptionist enter the information at another lobby. Refer to Adding a New Sign-In Station for more information.



## Pre-Registration

Many companies and organizations prefer to pre-register visitors and groups – especially for corporate events, group meetings and tours. This makes the sign-in process much faster and less taxing for both the visitors and the front desk personnel.

Visitors can be pre-registered by anyone with the proper password and PassagePoint software. If you have the Web Pre-Registration, only a standard web browser is required, such as Microsoft® Internet Explorer. This allows employees the ability to pre-register visitors from their desk. Refer to the *Web Pre-Registration* section to learn more about how these features operate.

When a visitor is pre-registered the information becomes available on the expected date of arrival. On this day the visitor's name will appear as a "pending" visitor. The visitor badges may be printed ahead of time to expedite distribution, or as visitors arrive. If the visitor is never signed-in, their status is automatically changed to "No Show" and removed from the pending list at the end of the day.

## Viewing and Printing Reports

Visitor information is stored in the data file for as long as you like. This allows managers to view historical data, print various reports and export data. To access this data, users will need the PassagePoint software and a user name and password with the proper permissions. It is possible to search and sort on almost any field and then export or print the report in various formats. There are many standard reports provided as well as an almost unlimited number of user-definable custom reports.

# Hardware & Operating System Specifications

## Workstation System Requirements

### *Windows 98, ME*

	<b>Minimum</b>	<b>Recommended</b>
Processor	Pentium/133 or Equivalent	Pentium II/Equivalent or better
RAM	64 MB	128 MB
Hard Disk Space	15 MB	20 MB
Monitor	SVGA (800 x 600)	XVGA (1024 x 768)
CD-ROM	Required for installation	Required for installation

<b>Operating System</b>	<b>Minimum</b>	<b>Recommended</b>
-------------------------	----------------	--------------------

Windows 98	Windows 98	Windows 98, 2nd Ed.
Windows ME mended	Windows ME	Windows ME is not recom-
Windows NT 4	Service Pack 4	Service Pack 6a
Windows 2000	Service Pack 1	Service Pack 2
Windows XP	Windows XP	Service Pack 1

### *Windows NT 4, 2000, XP*

	<b>Minimum</b>	<b>Recommended</b>
<b>Processor</b>		
Windows NT 4	Pentium Pro/133 or Equivalent	Pentium II/Equivalent or better
Windows 2000	Pentium II/233 or Equivalent	Pentium II/Equivalent or better
Windows XP	Pentium II/300 or Equivalent	Pentium II/Equivalent or better

## RAM

Windows NT 4                      64 MB                                      128 MB

Windows 2000/XP                      128 MB                                      192 MB

## Hard Disk Space

15 MB

## Monitor

SVGA (800 x 600)

XVGA (1024 x 768)

## CD-ROM

Required for installation

Required for installation

## Server System Requirements

### *Windows 98, ME*

	<b>Minimum</b>	<b>Recommended</b>
Processor	Pentium II/233 or Equivalent	Pentium III/Equivalent or better
RAM	128 MB <sup>1</sup>	512 MB <sup>1</sup>
Hard Disk Space	50 MB <sup>2</sup>	50 MB <sup>2</sup>
Monitor	SVGA (800 x 600)	XVGA (1024 x 768)
CD-ROM	Required for installation	Required for installation

<b>Operating System</b>	<b>Minimum</b>	<b>Recommended</b>
Windows 98 <sup>3</sup>	Windows 98	Windows 98, 2nd Ed.
Windows ME <sup>3</sup>	Windows ME	Windows ME is not recommended
Windows NT 4	Service Pack 4	Service Pack 6a
Windows 2000	Service Pack 1	Service Pack 2
Windows XP	Windows XP	Service Pack 1

***Windows NT 2000, XP, 2003***

	<b>Minimum</b>	<b>Recommended</b>
<b>Processor</b>		
Windows NT 4/2000	Pentium II/233 or Equivalent	Pentium III/Equivalent or better
Windows XP	Pentium II/300 or Equivalent	Pentium III/Equivalent or better
for Windows 2003	Pentium III or Equivalent	Pentium III/Equivalent or better

<b>RAM</b>	128 MB <sup>1</sup>	512 MB <sup>1</sup>
<b>Hard Disk Space</b>	50 MB <sup>2, 4</sup>	50 MB <sup>2, 4</sup>
<b>Monitor</b>	SVGA (800 x 600)	XVGA (1024 x 768)
<b>CD-ROM</b>	Required for installation	Required for installation

**Notes:**

- 1) Actual requirements for RAM vary according to the number of concurrent users, typically 2 to 8 MB per user. Contact STOPware Technical Support for specific details.
- 2) Actual requirements for hard disk space vary according to the number of users and the number of visits stored. Contact STOPware Technical Support for specific details.
- 3) Windows 98, and Windows ME, while supported, are not recommended operating systems for PassagePoint Server. Contact STOPware Technical Support for specific details.
- 4) For optimum performance, NTFS is recommended for server installations.

## Features

### Badge Printer

Almost any printer with a Windows driver can be used by PassagePoint. In most cases, small, direct-thermal style printers are best since they require little desk space, don't require ink and they quickly print one badge at a time. The printer commonly used with PassagePoint is: Dymo LabelWriter 330 Turbo ([www.dymo.com](http://www.dymo.com)). Please refer to "Working with a Printer & Print Driver" in the *Getting Started* section of this manual for more information.

### Business Card Scanner


The Corex CardScan ([www.cardscan.com](http://www.cardscan.com)) hardware works with PassagePoint to scan business cards and automatically enter the information into the current visit record. Currently, PassagePoint works with the 500 and 600 models. Depending on the model, a USB or Parallel port is required for this device. Please refer to the Corex documentation for questions about specific requirements.

### Signature Capture Device

The Penware 1500 signature tablet works with PassagePoint to capture digital signatures. A serial port is required for this device. Please refer to the penware documentation for questions about specific requirements.

### Photo Capture Device

PassagePoint can capture photos using a TWAIN driver for the camera. An additional photo capture license is required for each workstation to capture photos. Various cameras will work with PassagePoint including: Logitech Quickcam and ValCam Professional Camera.

<p><b>Warning</b></p> 	<p>Not all manufactures of cameras conform to the TWAIN standard, causing incompatibilities with PassagePoint. Make sure that the camera you purchase includes a compatible TWAIN driver.</p>
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## **Driver License & Passport Scanners**

Works with various types of barcode/magstripe DL readers as well as OCR DL scanners. Please contact your PassagePoint representative for a complete list of compatible DL scanners.

## **BarCode Readers**

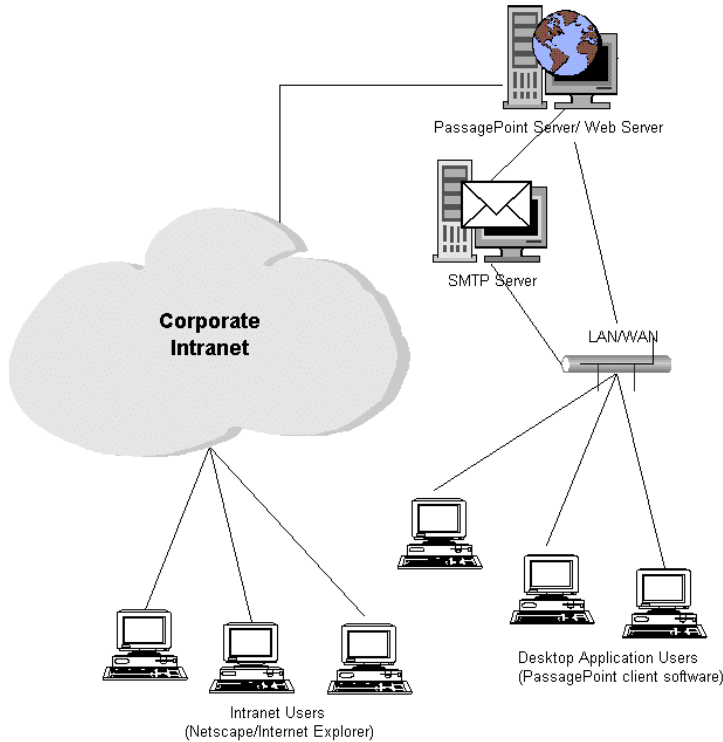
PassagePoint can take input from a barcode scanner to speed the sign-in/out process. Most barcode scanners with a serial or keyboard wedge interface work with PassagePoint.

## **Network Protocols**

PassagePoint products are able to work in almost any network environment. PassagePoint uses the TCP/IP network protocol to communicate.

## Overview of System Architecture

PassagePoint uses client/server technology to network multiple workstations with a central database. The design of the system provides high performance and reliability whether you have two lobbies or fifty lobbies. In addition, this design allows the server to perform various administrative tasks during low-usage times. The PassagePoint server functions as the database server as well as an Application Server. This means that if a software update is required, the clients will be updated by simply updating the server.





## Database Engine Technology

PassagePoint Professional uses a powerful ODBC database engine. The database engine is embedded into the PassagePoint software to provide a reliable and scalable platform from which to operate. The database provides the following features:

- Multi-threaded processing
- 32 bit processing
- ODBC connectivity
- Client/Server or stand-alone architecture
- Cross Platform clients
- TCP/IP connectivity

## PassagePoint Enterprise

Refer to the Enterprise SQL Server and Oracle addendum for more information.



# 2


## Getting Started & Installing

### What You Will Need

- This manual or the Installation Guide
- PassagePoint Install CD (includes most, if not all the drivers needed.)
- PassagePoint Serialization information
- Workstation(s) that will be installed with PassagePoint
- Printer(s) for printing visitor badges (and printer driver)
- Badge stock
- Server Computer (for client/server configuration)
- Other hardware (for special requirements such as signature capture)
- Administrative access for installing software and drivers
- Static IP address of Server machine

## Installing PassagePoint


Installing PassagePoint is made easier with the use of installer wizard applications and some setup wizards within PassagePoint. To begin, you must first decide whether this will be a client/server install or is this a standalone install on a single workstation. You will find both installer applications on your CD so be careful to select the correct one.

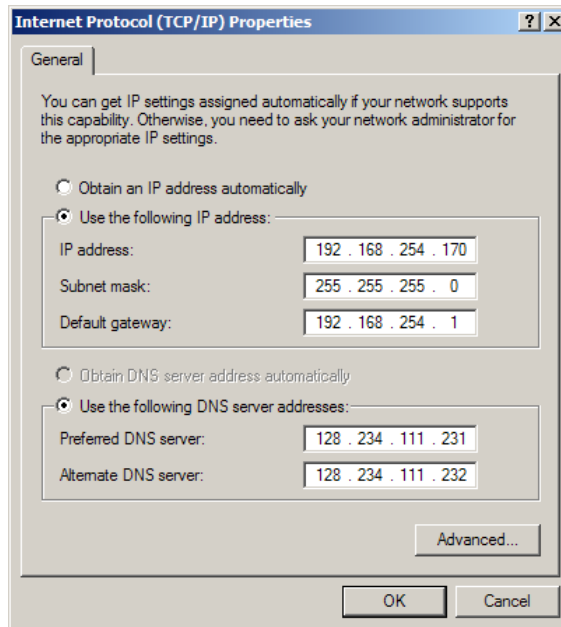
<b>Note</b> 	The PassagePoint Installation Wizard includes most hardware drivers.
--	--

## Client/Server Install

This install requires that a few additional steps be taken to set up the server. It is recommended that you perform the following steps below in the order shown to ensure a quick installation process.

1. Gather the required items listed above in "What You Will Need."
2. Prepare the server computer. Make sure that the TCP/IP protocol is installed using the Network Control Panel. Confirm that there is a static IP address assigned to the server machine. You will need this address later when setting up the workstations. Server's IP address: \_\_\_\_\_

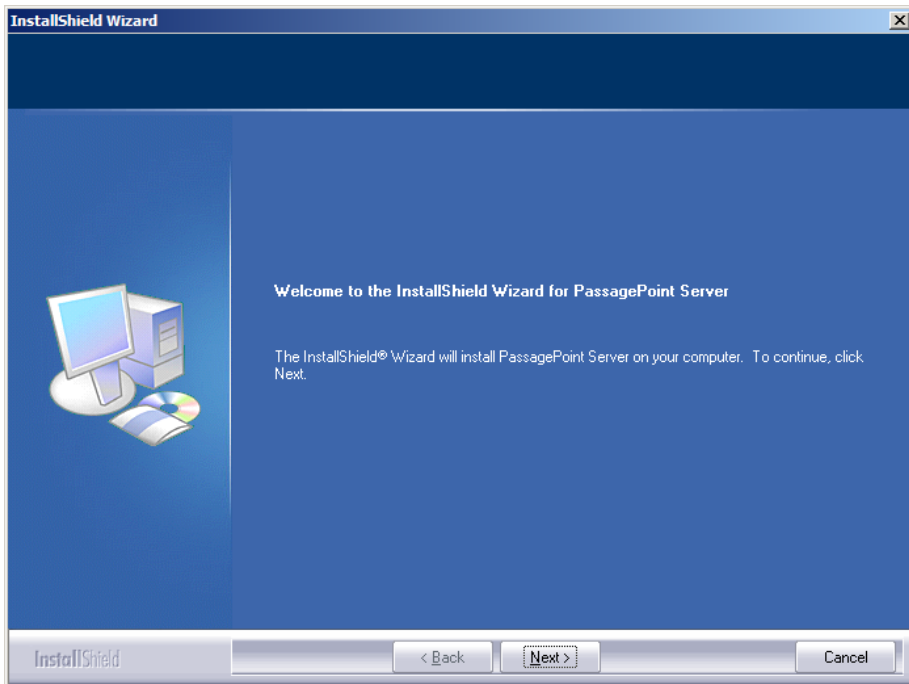
<b>Note</b> 	A fully qualified domain address may be used instead.
--	---



3. It is recommended that a printer driver be installed on the server machine. This will prevent a warning from being displayed each time the server is launched. Log in as the local administrator user and select the Add a Printer icon and select any printer driver available as a local printer.
4. Disable any anti-virus software prior to software installation.

## Installing Server Software on the Server Machine

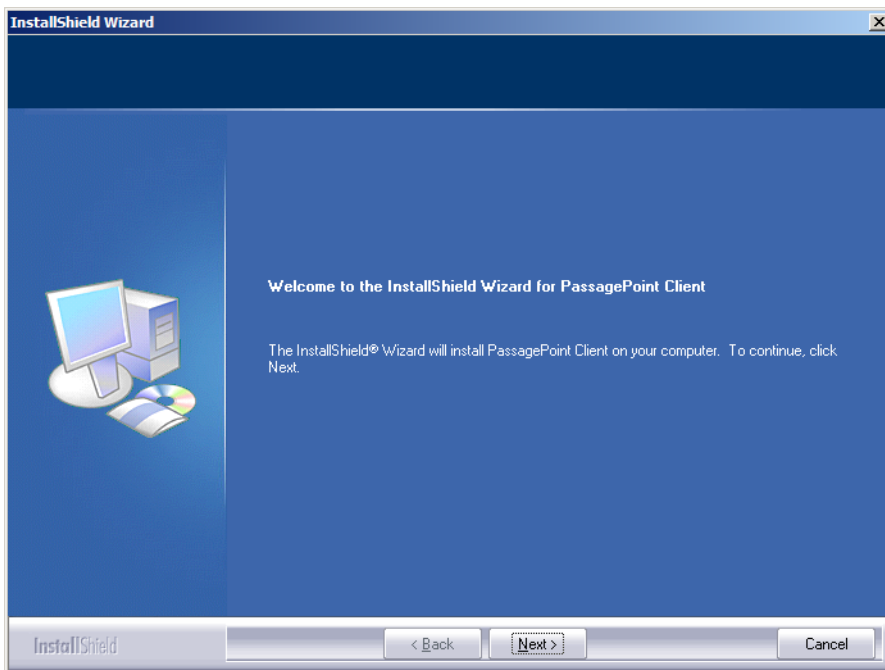
1. Insert the installer CD into the CD-ROM drive of the server machine.
2. Locate the CD on your desktop and open the Client/Server folder. Open the Server Application Folder.
3. Double click on the Setup.exe icon.
4. Follow the instructions on the installer application.



## Installing Client Software on the Server Machine

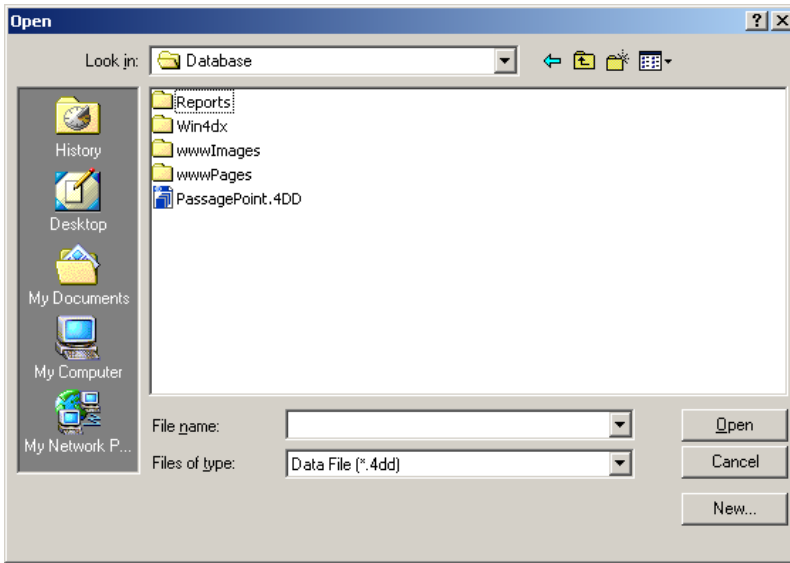
This may be used to perform specific administrative functions on the server. It is not recommended to run the client and server in a production environment.

1. Insert the installer CD into the CD-ROM drive of the server machine.
2. Locate the CD on your desktop and open the Client/Server folder. Open the Client Application Folder.
3. Double click on the Setup.exe icon.
4. Follow the instructions on the installer application.




5. Launch the server application and create a new data file.

6. Locate the PassagePoint server icon on the desktop or in the Start Menu > Program PassagePoint > Server.
7. Launch the PassagePoint server.
8. A window will open asking you to locate the data file.

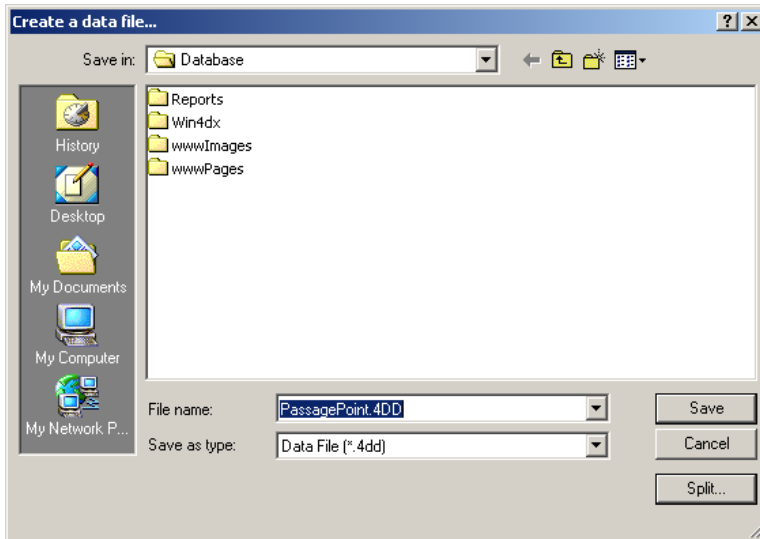


9. Click the **New** button to create a new data file.

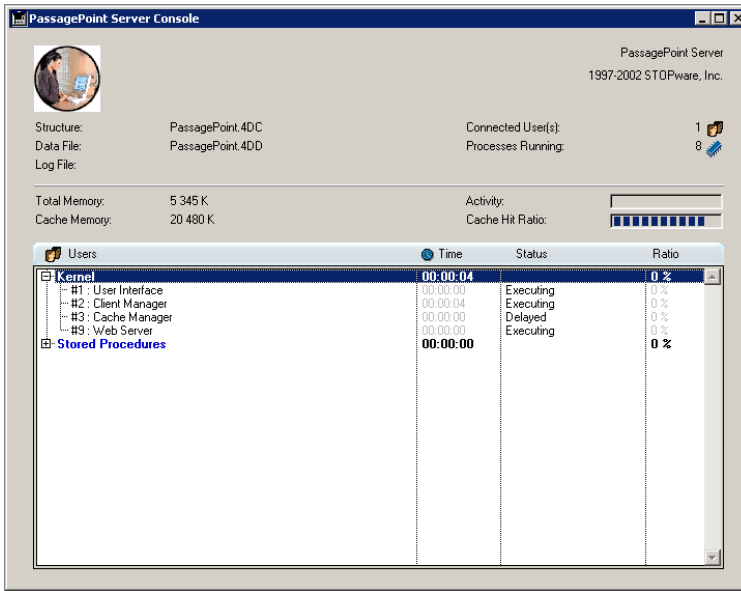
<p><b>Note</b></p> 	<p>If your installation requires a large data capacity (over 2 GB of data), refer to "Create a Segmented Data File" later in this manual for information on using the "Split" feature.</p>
--	--


10. Another window will open asking you to name the data file.






11. Leave the name "PassagePoint.4DD" and Click **Save**.
12. The server application will open a screen that shows activity and users. Leave this screen open.




<p><b>Note</b></p> 	<p>Please refer to "Register PassagePoint Server as a Service" for more information on this option.</p>
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<p><b>Web Pre-Registration Note</b></p> 	<p>Please refer to the <i>PassagePoint Web Pre-Registration</i> section of this manual for more information.</p>
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## Preparing a Workstation for Each User

1. Install the badge printer driver (this can be done later if not available). The Passage Point Installer may control the driver you need.
2. Set the orientation to landscape and the correct paper size in the printer driver. For NT, 2000, and XP this should also be set in printing preferences. Make the orientation and paper size selection in the Driver's Properties settings as well. Some drivers have an Advanced button that stores this information.
3. Make sure that the TCP/IP protocol is installed using the network control panel.
4. Disable any anti-virus software prior to software installation.

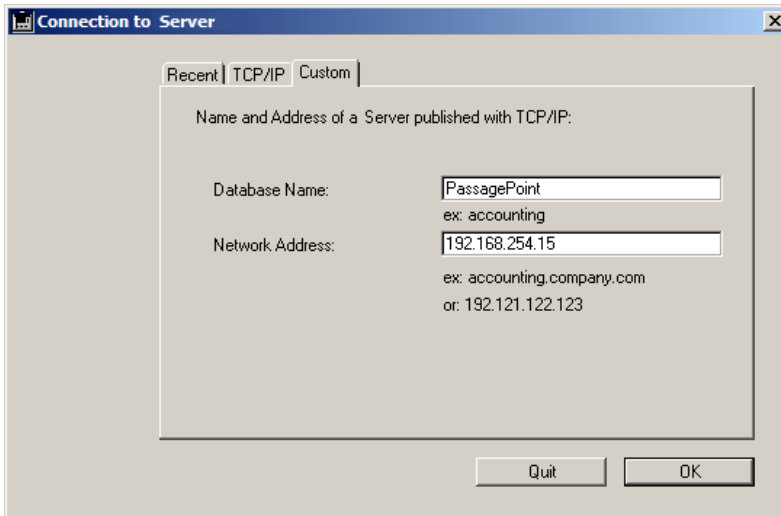
<p><b>Note</b></p> 	<p>Most versions of Windows now handle printer drivers on a user by user basis. This means that a print driver will need to be installed and configured for each user of that machine that needs to use PassagePoint.</p>
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## Installing Client Application on Workstations

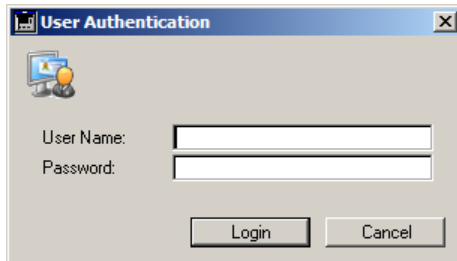
1. Insert the installer CD into the CD-ROM drive of the workstation.
2. Locate the CD on your desktop and open the Client/Server folder. Open the Client Application Folder.
3. Double click on the Setup.exe icon.
4. Follow the instructions on the installer application.
5. Turn anti-virus software back on.
6. Repeat these steps for each workstation.

## Serialize PassagePoint

1. Launch the Client Application from a workstation. The PassagePoint Client icon may be found on the desktop or in the Start Menu > Programs PassagePoint > Client.
2. When the connection window opens, click the TCP/IP tab. If the PassagePoint server is listed, click **OK** and skip to step 6. If not, continue.



3. Click the Custom tab and Enter "PassagePoint" into the Database name field.
4. In the Address field, enter the IP address of the server machine (as noted in step 2). Alternatively, you may use the full domain address of the server instead.
5. Click the **OK** button.
6. A login window will appear. Enter "ADMIN" for the user name and leave the password field blank. Click the **Login** button.



7. The PassagePoint Setup Wizard will appear and walk you through the serialization process. Please follow the on-screen instructions. This is where you will use the serialization card.

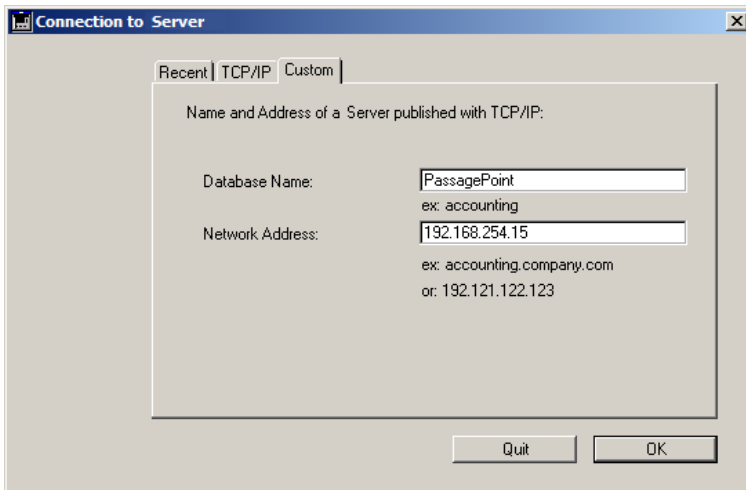


8. The Workstation Configuration Wizard will appear and walk you through selecting a printer and other options. Please follow the on-screen instructions.



## Configuring Remaining Workstations

1. Launch the Client Application from each workstation. The PassagePoint Client icon may be found on the desktop or in the Start Menu > Programs > PassagePoint > Client.
2. When the connection window opens, click the TCP/IP tab. If the PassagePoint server is listed, click the **OK** button and skip to step 6. If not, continue.
3. Click the Custom tab and enter "PassagePoint" into the Database name field.
4. In the Address field, enter the IP address of the server machine (as noted in step 2). Alternatively, you may use the full domain address of the server instead.
5. Click the **OK** button.



6. A login window will appear. Enter "admin" for the user name and the new admin password as entered into the Setup Wizard. Click the **Login** button.
7. The Workstation Configuration Wizard will appear and walk you through selecting a printer and other options. Please follow the on-screen instructions.
8. Repeat this for each workstation.

Please refer to the User Manual located at **Start Menu > Programs > PassagePoint > Client > User Manual.pdf** or on the PassagePoint CD for more information on using PassagePoint.

Now the PassagePoint software is installed and ready to go. Additional Server and Workstation configuration information can be found later in this manual. Check the Table of Contents for available topics. For example, to Register the Server as a service, refer to the *Server Configuration* section.


## Standalone Edition Install

Installing a standalone edition only takes a few steps. It is recommended that you perform the following steps below in the order shown to ensure a quick installation process.

Gather the required items listed in "What You Will Need."

### Preparing Workstation Computers

1. Install the badge printer driver (if available). This may be on the PassagePoint Installer or CD.
2. Set the orientation and paper size settings in the printer driver. For NT, 2000, and XP this should also be set in printer preferences. Make the orientation and paper size selection in the Driver's Properties settings as well. Some drivers have an **Advanced** button that stores this information.
3. Disable any anti-virus software prior to software installation.

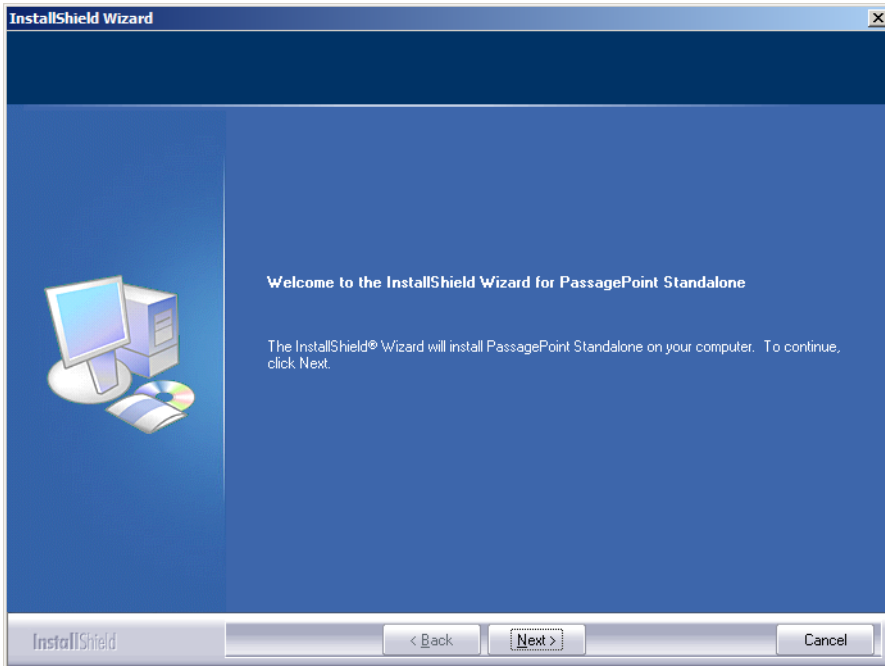
<p><b>Note</b></p> 	<p>Most versions of Windows now handle printer drivers on a user by user basis. This means that a print driver will need to be installed and configured for each user of that machine that needs to use PassagePoint.</p>
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### Installing PassagePoint

1. Insert the installer CD into the CD-ROM drive of the workstation.
2. Locate the CD on your desktop and open the Standalone folder.
3. Double click on the Setup.exe icon.



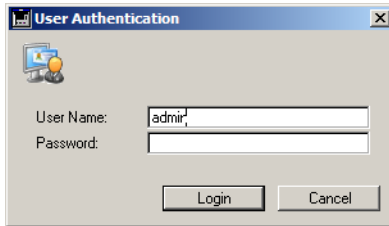
4. Follow the instructions on the installer application.



5. Turn anti-virus software back on.

## Serializing and Setting Up PassagePoint

1. Launch the PassagePoint Application. The PassagePoint icon may be found on the desktop or in the Start Menu > Programs > PassagePoint > Standalone.
2. A login window will appear. Enter "ADMIN" for the user name and leave the password field blank. Click the **Login** button.



3. The PassagePoint Setup Wizard will appear and walk you through the serialization process. Please follow the on-screen instructions.



4. The Workstation Configuration Wizard will appear and walk you through selecting a printer and other options. Please follow the on-screen instructions or refer to Using the Configuration Wizard later in this manual.



Please refer to the User Manual located at **Start Menu > Programs > PassagePoint > Standalone > User Manual.pdf** or on the PassagePoint CD for more information on using PassagePoint.



# 3

## Configuring Workstation Preferences

PassagePoint uses local settings for each workstation to provide the maximum amount of flexibility and control. These settings tell PassagePoint where the workstation is located (which lobby) and which printer it should use when printing a badge. This information is kept in a preferences file called "LobbyPrefs.ini" stored in the PassagePoint directory inside Program Files.

### Setting Station Preferences the First Time

The first time PassagePoint is launched, the Configuration Wizard will be displayed. The Configuration Wizard will guide you through the basic settings for the workstation. If you need to adjust advanced settings, use the Station Preferences option under the File menu.

## Using the Configuration Wizard

The Configuration Wizard will guide you through the following settings:

### Selecting a Printer for badge printing

Each workstation can have different printer settings. This allows you to have different printers, badge sizes, etc. at each location. From the menu, select the printer to use when printing badges. Click the **Next** button when finished. If the printer driver is not available or has not been installed, select any available printer and click the **Next** button. Refer to Changing the Station Preferences later in this manual for how to change the printer setting.



## Selecting a Location for the workstation

Each workstation is assigned to a lobby or location. This allows Passage-Point to display only the relevant visitors for that location or lobby. The first time the client software is launched, you will be asked to select the lobby or location for the workstation. If the workstation is not going to be used for badging visitors or if the location you wish to select is not listed, select any location. This setting can be changed later once the location you wish to select is added to PassagePoint. Please refer to the *Buildings/Lobbies* section of this manual for information on how to add locations and lobbies. Click **Next** when finished.

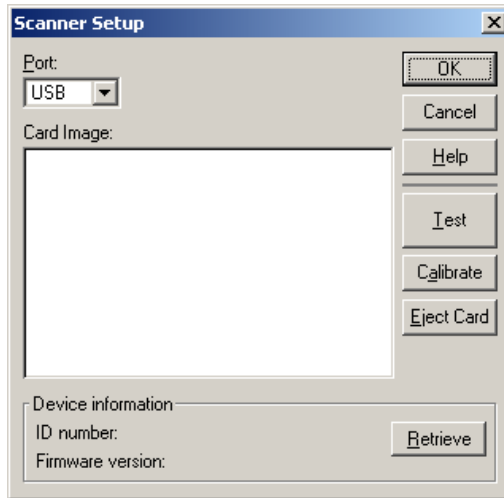


## CardScan Setup

PassagePoint can be used in conjunction with a business card scanner from Corex Technologies. All of the required software for CardScan is included on the Passage Point CD. In order for the scanner to work most effectively, it must be configured and calibrated. If you have the CardScan device attached and software installed, click the check box and proceed with the calibration process. To calibrate, insert the calibration card and click the **Calibrate** button. Click **OK** to finish.







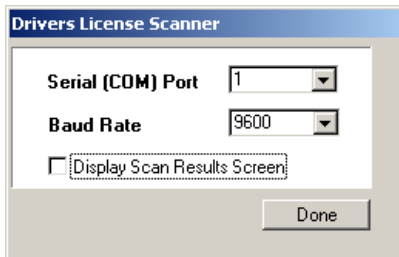
## Signature Capture setup


PassagePoint can be used in conjunction with a signature capture device. If you have or plan to have a signature capture device attached to this workstation, click the check box. Click **OK** when finished.



## Driver License/Passport Scanner Setup

Passage Point can use a Driver License Scanner to capture visitor data. If you have a driver license scanner attached, click the Check box. Click **Next** when finished.



<p><b>Note</b></p> 	<p>If the Driver License Scanner is a serial device, click the <b>Configure</b> button to set the port and speed.</p>
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Click **Finish** to complete the setup process.

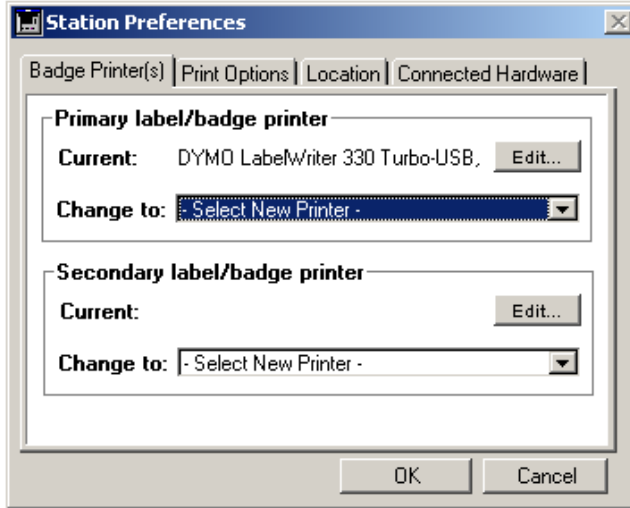


## Changing the Station Preferences

Station Preferences and settings may need to be changed from time to time. This can be done by selecting Station Preferences from the File menu.

## Badge Printer(s)

The badge printer setting tells PassagePoint what printer to designate for printing badges. This eliminates the need to display the print dialog screens each time a badge is printed and speeds the printing process. Since in most cases, the badge printer is not the workstation's default printer, this setting must be correct for badge printing to work properly.



### Primary Label/Badge Printer

In most cases, you will only need one badge printer. The printer shown next to Current is the currently selected printer (if one has been previously selected). Use *Change* to select a new badge printer option.

If needed, click the **Edit** button to edit the full path to the printer.

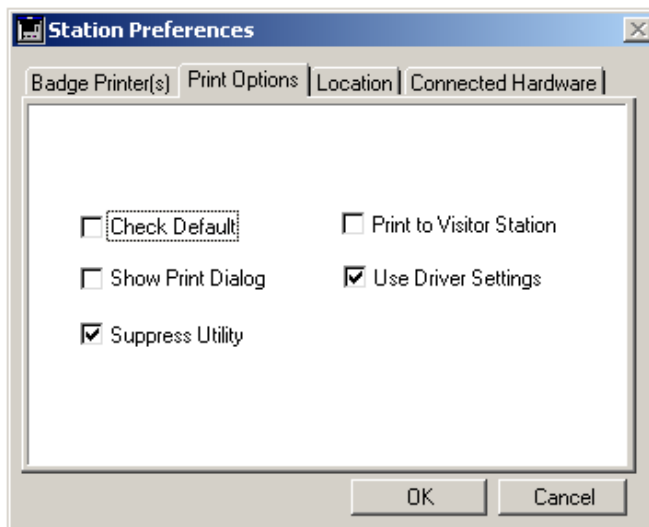
## Secondary Label/Badge Printer

Use the Secondary Printer setting to use two badge printers on the same workstation. This allows you to have different badge media in each printer or pre-printed stock and blank stock at the same location. To assign the primary and secondary printer to a category, see Directory Categories later in this manual. The printer shown next to Current is the currently selected printer (if one has been previously selected). Use *Change* to select a new badge printer option.

If needed, click the **Edit** button to edit the full path to the printer.

## Print Options

In most cases, the only settings that should be required are the "Use Driver Settings" and "Suppress Utility".



### Check Default

PassagePoint checks for the system's default printer each time it does a print job. This is recommended for users that share printers or use network printers.

## Print to Visitor Station


This setting should be used in special cases only. If you are using a visitor sign-in computer with a printer connected directly to it, then this setting can be used on the reception workstation. If selected, when the receptionist prints a badge, the print job will be sent to the visitor computer to be printed. To maximize performance, it is best to use Windows printer sharing instead of this option, if available.

## Show Print Dialog

This option will display the standard Windows print setup and print dialog screens each time the badge is printed.

## Use Driver Settings

This option is normally selected. When the badge is printed, PassagePoint uses the defaults set in the printer driver such as size and orientation.

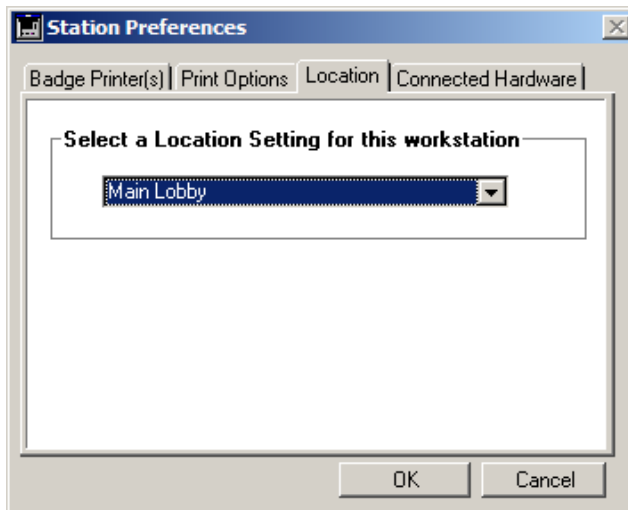
<b>NT/2000/XP Note</b> 	Make sure the orientation and paper size defaults are set for both the Properties of the driver and the Document Defaults/Printing Preferences.
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## Suppress Utility

This option is normally selected. This option is used internally to either use an optimization process for printing or to suppress it. In most cases, the optimization process is not required.

## Location

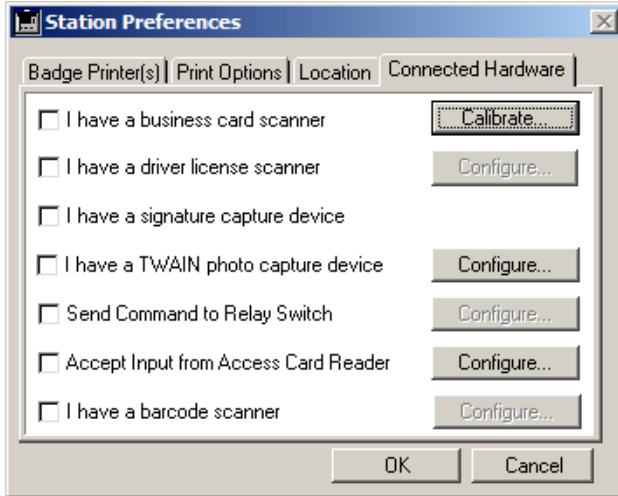
Each workstation is assigned to a lobby or location. This allows Passage-Point to display only the relevant visitors for that location or lobby. The first time the client software is launched, you will be asked to select the lobby or location for the workstation in the Configuration Wizard. Once the application has launched, you can make changes to the location setting in the Station Preferences under the File Menu > Station Preferences. Click the Location tab.



To change the Location setting, select the location tab. If the location is not listed, refer to Buildings/Lobbies later in this manual.

## Connected Hardware

PassagePoint can be used in conjunction with hardware devices to capture photos, signatures information from a business card, and drivers' licenses.



### Business Card Scanner

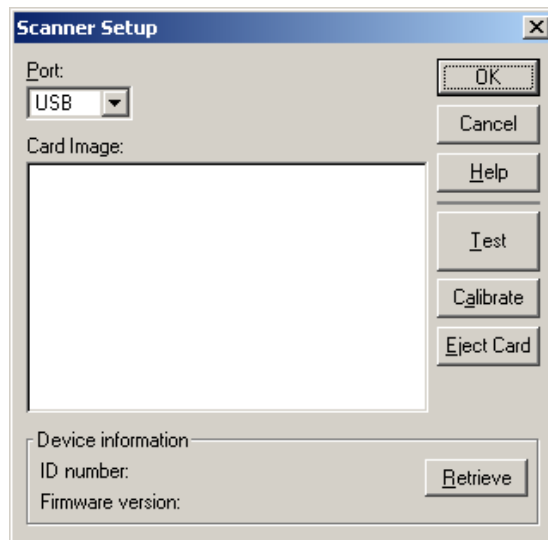
PassagePoint can be used in conjunction with a business card scanner from Corex Technologies. In order for the scanner to work most effectively, it must be configured and calibrated.

For information on how to capture data, please refer to Mapping Card Scan Data later in this manual.



To Configure and Calibrate Scanner, select File Menu > Station Preferences

1. Select the Connected Hardware tab.
2. Click the **Calibrate** button and follow the on-screen instructions.
3. Click **Done** when finished.

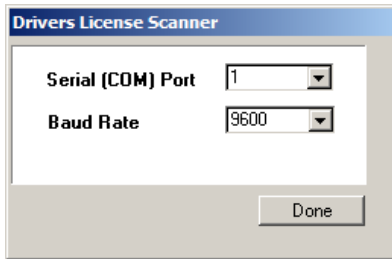


## Driver License Scanner

PassagePoint can be used in conjunction with various driver license scanners.

To Configure a Serial Based Scanner, select File Menu > Station Preferences

1. Select the Connected Hardware tab.
2. Click the **Configure** button.



3. Select the Serial Port and Baud Rate
4. Click **Done** when finished.

To Configure an OCR based Scanner, select File Menu > Station Preferences.

1. Select the Connected Hardware tab.
2. Click the **Calibrate** button.
3. Follow the on-screen instructions
4. Click **Done** when finished.

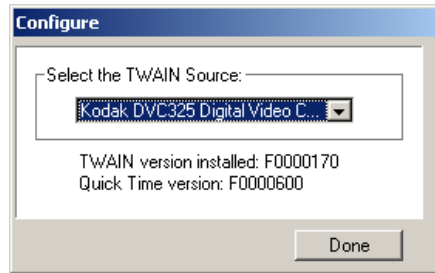
For information on how to capture data, please refer to Driver License Scan Setup later in this manual.

## Signature Capture Device

PassagePoint can be used with certain signature capture devices. Check the hardware specifications for compatible hardware. If you have or plan to have a signature capture device attached to this workstation, select this option.

## Photo Capture Device

PassagePoint can be used with many TWAIN photo capture devices. Check the hardware specifications for compatible hardware. If you have a photo capture device attached to this workstation, select this option. Please refer to the *Photo Capture* section of this manual for more information.

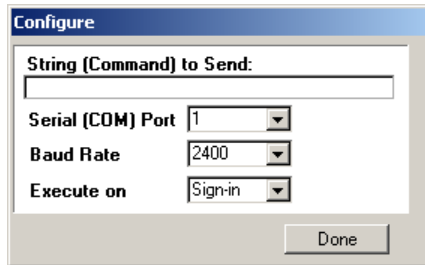


To Select a TWAIN device, select File Menu > Station Preferences

1. Select the Connected Hardware tab.
2. Click the **Configure** button and select your TWAIN device from the menu.
3. Click **Done** when finished.

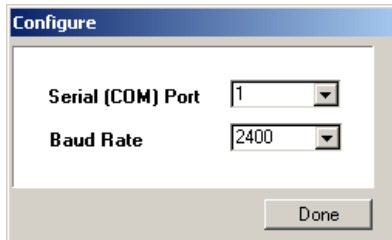
## Send Command to Relay Switch

PassagePoint can be used with an automated electronic switch for opening gate arms, doors, or turnstiles.



## AccessCard Reader

PassagePoint can be used with an access card reader input device such as a proximity reader. This allows the user to scan an access card into the access card field instead of typing it in.



To Configure the Access Card Reader, select File Menu > Station Preferences.

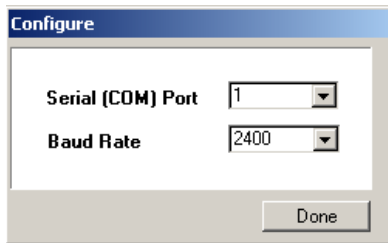
1. Select the Connected Hardware tab.
2. Click the **Configure** button and choose your settings.
3. Click **Done** when finished.

## Barcode Scanner

PassagePoint can be used with a serial-based bar-code scanner to sign-in and sign-out visitors. It scans a barcode printed on the visitor badge. The barcode format is 3 of 9 (barcode 39). The data represented on the barcode is determined by the settings in the badge design. Generally, the barcode is the Visit ID or Access Card Number. Please refer to the badge designer section of this manual for more information on printing barcodes.

To Configure the Barcode Scanner, select File Menu > Station Preferences.

1. Select the Connected Hardware tab
2. Click the **Configure** button and choose your settings.
3. Click **Done** when finished.



Now that the barcode scanner is setup, you can scan a barcode printed by PassagePoint to sign-in and sign-out visitors. The most common setup is to print the Visit ID in barcode format. Scanning that barcode with a serial-based scanner will do one of the following:

1. If the person is pre-registered, the visit is signed-in and will be changed to the Active status.
2. If the person is active, the visit will be signed-out and will be changed to the Closed status.
3. If the ID is not recognized, nothing will happen.

Other options are available for using barcodes with Extended Visits, Access Control Systems and 2D barcode readers. Please refer to the Index for a complete listing of barcode usage.

## System Settings on the Workstation


There are some settings in Windows that will affect the look and feel of PassagePoint. Here are some common settings to keep in mind:

### Monitor Resolution

PassagePoint was designed to accommodate various screen resolutions. For the best results, the reception computers should have a minimum screen resolution of 800 x 600. Higher resolutions may provide more effective space on the desktop. The visitor sign-in computer should have a screen resolution of 640 x 480, so the fonts and text are larger and more readable.

To change your resolution setting, select Control Panel > Display.

1. Click the Settings tab.
2. Adjust the Screen Area slider.
3. Click **Apply** to save changes.


<p><b>Note</b></p> 	<p>The resolution setting may be located in another place on your computer.</p>
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## System Font Setting

Windows has a font setting that can affect the look and feel of Passage-Point screens. The default setting is "small fonts." If the "large fonts" setting is selected, the field titles may become chopped off and hard to read.

To change your font setting, select Control Panel > Display

1. Click the Settings tab.
2. Click the **Advanced** button.
3. Click Apply to save changes.

<p>Note</p> 	<p>The font setting may be located in another place on your computer.</p>
---	---






# 4

## Server Configuration

### Printer Driver on Server Machine

PassagePoint Server requires that there be a printer driver installed or it will display an error message each time it launches. The server will wait for the error message to be clicked before finishing its launch. To keep this from happening, install any printer driver onto the server machine. Even if there is no printer available, the installation of the driver will keep this error message from being displayed. The printer driver should be installed as a “local” printer and must be available to the login used when PassagePoint is launched.

<b>Note</b> 	This operation should be performed before PassagePoint is registered as a service.
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### Install a Printer Driver


1. Log on to the server using the local Administrative password.
2. Go to: Start Menu > Settings > Printers.
3. Double-click Add Printer.
4. Follow the on-screen instructions to add a local printer driver.


## Registering as a Service (NT/2000/XP/2003)

PassagePoint server software can be registered as a Microsoft Service. This allows greater administrative control for starting and stopping the server application. In addition, this allows the server to run while the computer is locked.

### Registering PassagePoint

1. Launch PassagePoint Server from the icon.
2. Select Register as a Service from the File menu.
3. Exit the PassagePoint Server application.
4. Open the Services window from the control panel (Located under Administrative Tools in Windows 2000 and XP).
5. Set the service options as needed. (i.e. Automatic)

<p>Note</p> 	<p>If there is no printer driver installed on the server, an error message will appear when the server is launched. This error message will prevent the service from loading. Please refer to <i>Printer Driver on Server Machine</i> earlier in this section for information on how to avoid this error message.</p>
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<p>Note</p> 	<p>Once registered as a service, PassagePoint should be launched from the services window or automatically on startup. Double-clicking the icon will not launch PassagePoint as a service.</p>
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## Unregistering PassagePoint

1. Stop the PassagePoint service.
2. Launch PassagePoint Server from the icon.
3. Select Unregister this Database from the File menu.
4. Exit the PassagePoint Server application.

## Optimization Setting for NT

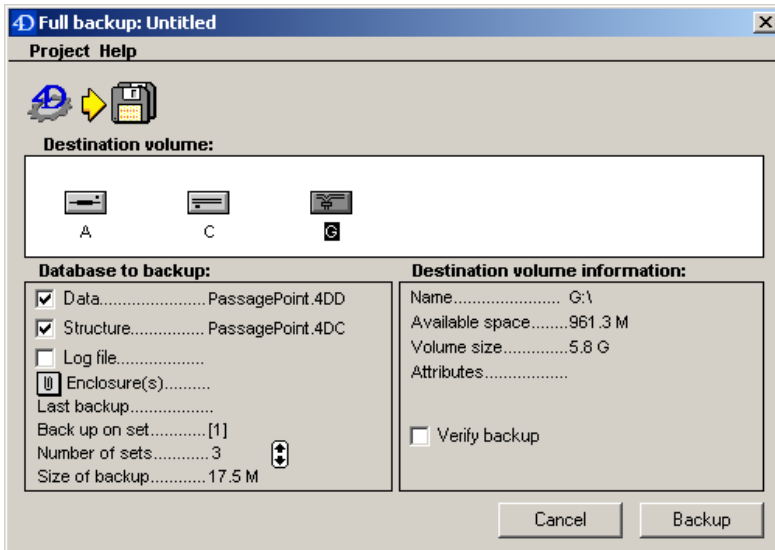
Windows NT Server 4.0 allows you to tune the machine to maximize performance. On NT, go to Network in the Control Panel. Select the Services tab. Select Server and click Properties. Select "Maximize throughput for network applications."

## Backup/Restore Features


PassagePoint has a built-in backup feature on the Server that allows the administrator to perform regularly scheduled backups. This ensures that the data is safe in case of a system failure, hard drive crash, etc.

### Full Backup

1. Make sure all users are logged off from the system.
2. Choose Full Backup under the Backup menu on the Server.



3. Select the drive where the backup will be saved.

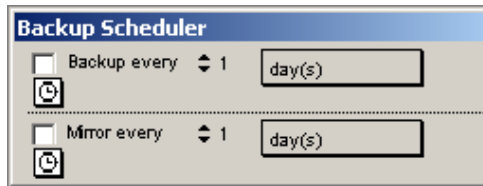
<p><b>Note</b></p> 	<p>Backup does not recognize network volumes. So you may have to make the backup to the same volume, and then copy it to another volume on the network</p>
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4. Make sure the data and structure options are checked.

5. Select Verify Backup.
6. Click the **Backup** button.

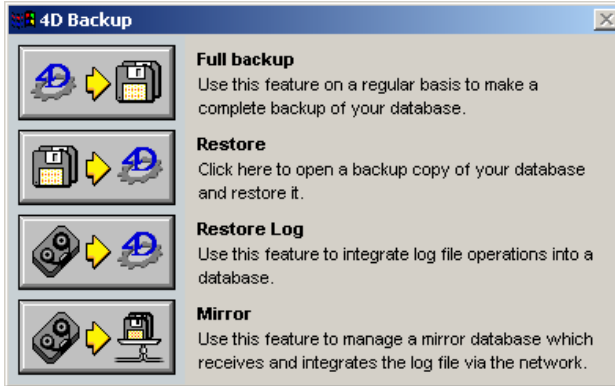
### Scheduling Repeat Backups

1. Perform a full backup first (refer to “Full Backup” on page 54).
2. Save the backup project file inside the Database directory located inside the PassagePoint Server directory.
3. Select the backup options from the Backup Scheduler window.



## Restoring From a Backup

1. Launch the Backup application located in the utilities directory.
2. Click the **Restore** button.



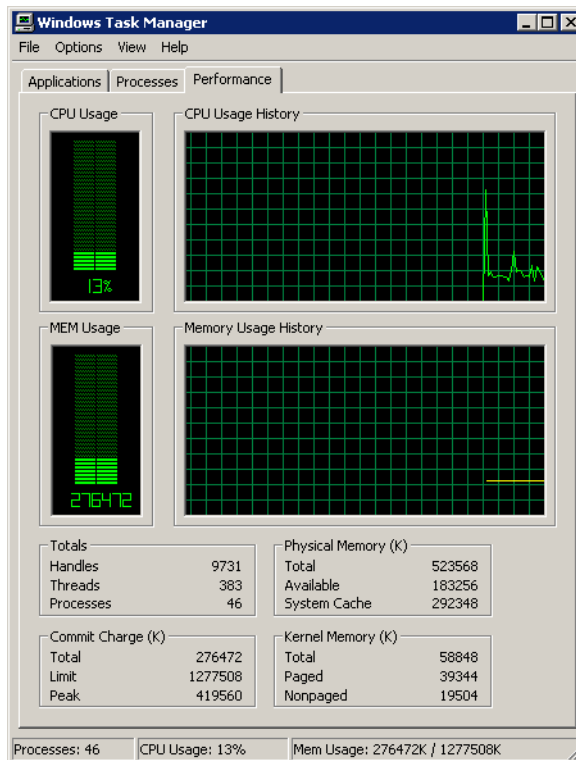
3. Once the window opens, select the backup file to restore from. Click Open.
4. The data file "PassagePoint.4DD" and "PassagePoint.4DR" will be created and saved.

## Tuning the Servers Idle

The System Settings Tab allows you to set some options that make a difference in the performance of your database. Select File > Database Properties > System Settings.

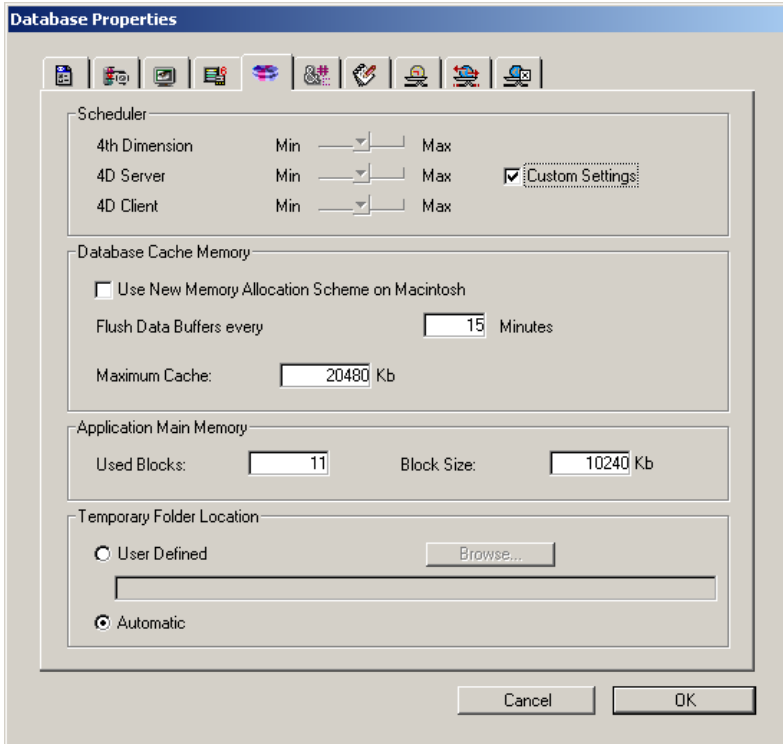
### Scheduler Options

These options work together to help tune your database. When the Server is running with the default settings, it assumes that it is running as a dedicated server. Therefore, it uses a significant proportion of the CPU time: ranging from approximately 20% at idle to as much as 100% when the server is active. To observe this behavior, you can use Ctrl-Alt-Del, then click the **Task Manager** button to bring up the Task Manager.



When you modify the three Scheduler options, you change the default behavior of the Server under Windows.

To reduce the CPU usage, slide all three scheduler settings to the left.





## Database Cache Memory Settings

This setting tells the server how much memory to reserve for the data cache. The data cache is that portion of memory that the server reserves for data: records, indexes, record addresses, and so on. The default setting is 2480 Kb.

## Application Main Memory

This option allows you to tell the server how to request additional memory from the Windows operating system: the maximum number of blocks and the size of each block. The default setting is 11 blocks at 10240 Kb for each block.




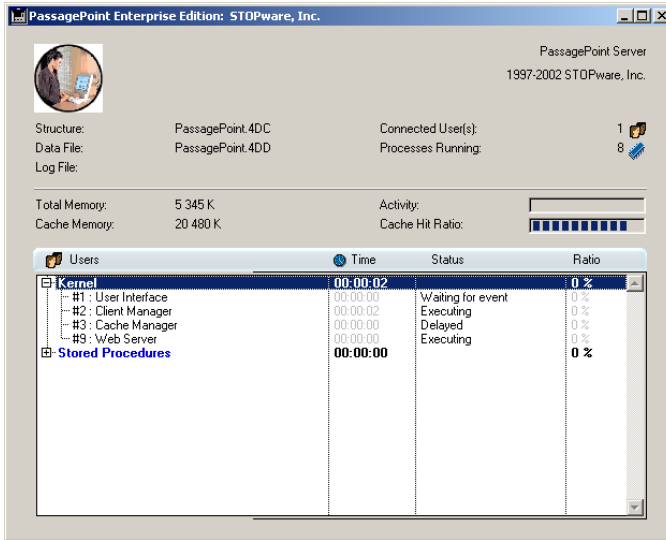
# 5

## Web Pre-Registration Configuration

### Starting the Web Server

The PassagePoint Web Pre-Registration Module is a built-in web server that allows people within the organization to preregister visitors prior to their arrival. The web server will start automatically upon launch of PassagePoint Server. No additional software or configuration is required. To confirm that the web server is running, check the Server Process window to see if the Web Server is running.

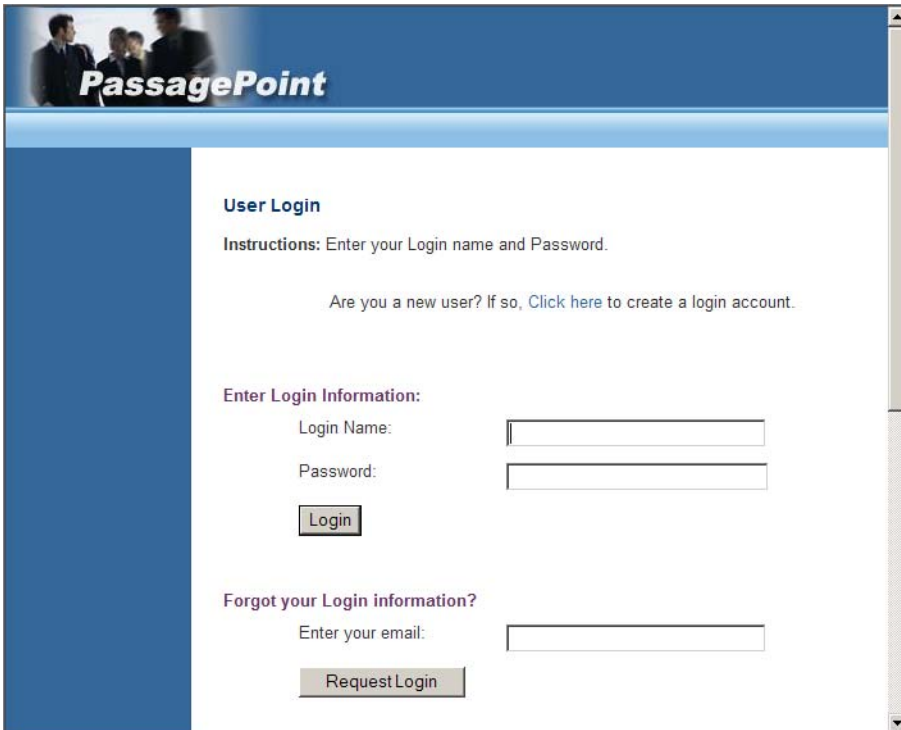
<p><b>Note</b></p> 	<p>You will not need to use the Web Server menu to start or stop the web server. Once the Web Pre-Registration Module license has been added, the Web Server will launch automatically.</p>
--	---



## Connecting to the PassagePoint Intranet Site

To access the PassagePoint web site, enter the IP address or domain name of the server machine into the location line of your favorite web

browser. PassagePoint can be used by Microsoft Internet Explorer and Netscape Navigator.

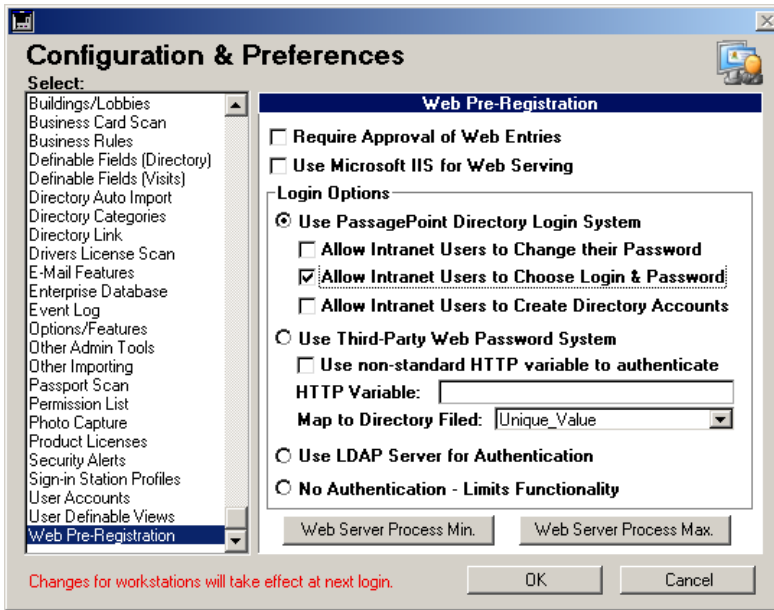


The screenshot shows the PassagePoint User Login page. At the top, there is a blue header with the PassagePoint logo and a photo of three people. Below the header, the page is divided into a blue sidebar on the left and a white main content area on the right. The main content area contains the following elements:

- User Login** section header.
- Instructions: Enter your Login name and Password.
- A link: Are you a new user? If so, [Click here](#) to create a login account.
- Enter Login Information:** section with two input fields: Login Name and Password.
- A **Login** button.
- Forgot your Login information?** section with an input field for email.
- A **Request Login** button.

## Online Password Options

PassagePoint allows various ways to handle online passwords for access to the Web Pre-Registration Module. By default, Intranet users must have a login and password to access PassagePoint. If the user does not have a login and password, they would have to ask an administrator of PassagePoint to create one.



## Allow Intranet Users to Choose Login and Password

This option allows only users who are already in the directory to add a login and password to their account. This information is then emailed to the directory record's Email address (if available) as a security measure.

## Allow Intranet Users to Create Directory Accounts

This option allows users who are not currently in the directory to add themselves along with a login and password. This option provides the most flexibility for users, but provides less security.

## Use Third-Party Password System

This option allows the PassagePoint Web Pre-Registration Module to give password control to another password system such as Siteminder. With this option selected, the web pages found inside the Database Directory would be "secured" with the third-party system. If a user tried to access any page, they would be re-directed to the third-party system. Once they login, would pass the user name to PassagePoint and PassagePoint would find a match in the directory. To make this process manageable, the directory should be imported routinely with the login information. Please refer to the *Directory Auto Import* section of this manual for more information.

## Use non-standard HTTP Variable to Authenticate


The default is "REMOTE USER". Select the option and enter a new user name as appropriate. This user name is the same name as the user name in the third-party web password system.

Use the "Maps to Directory" pull down window to locate the directory record of all the user names. If the name is recognized, PassagePoint continues. If the name is not recognized, PassagePoint does not prepopulate the user name and other host information.

## User Authentication using LDAP

Enabling LDAP uses the login screen as well as LDAP authentication before continuing.

Select Config > Users Accounts > Password Rules. In the User Authentication Rules window, check Use LDAP Authentication and then specify the Server Address of the LDAP server and a Search Base (See "Directory Linking with LDAP" on page 226 for more information on the the Search Base).

<p><b>Note</b></p> 	<p>PassagePoint will only authenticate users which exist in PassagePoint. In other words, to authenticate a user in an LDAP system via PassagePoint, that user must already exist as a user in the PassagePoint system.</p>
--	---

The passwords in each system for a given user do not need to match but the user names must match.

### **Require Approval of Web Entries**

This option allows Intranet users to pre-register visitors without the visitor information being instantly available to the receptionist. The visitor entries await approval by an authorized person, using the client application. Once they are approved, they become available to the reception staff. On the Intranet side, approved visitors can no longer be edited by the Intranet user and are shown in a Green color.

Refer to the PassagePoint User Manual on how to use the Client Application to approve web entries.

### **Working with Microsoft IIS**

PassagePoint Web Pre-Registration has its own built-in web server. It is possible, however, to use Microsoft IIS to serve the web pages.



## Installing the 4DISAPI Files

To work with IIS, PassagePoint uses **isapi** files to pass information back and forth from IIS and PassagePoint.

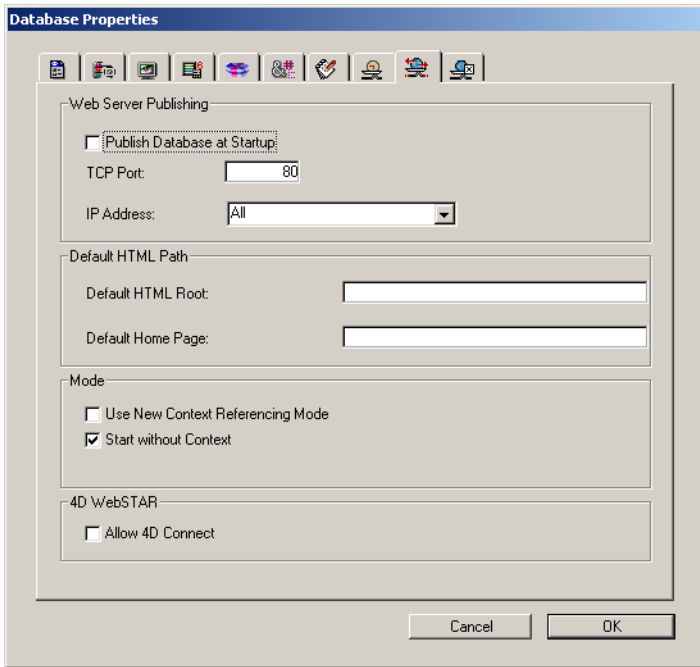
1. The files you need are installed into the IIS directory inside the PassagePoint server directory.
2. Three files will be placed inside. Two isapi files and one html file.
3. Place the "4disapi.dll" and "4disapi.ini" files inside the Scripts folder of the IIS server.
4. If IIS is only being used for PassagePoint, you may want to put the "default.htm" file into the root location of the IIS website (ie. x:\inetpub\wwwroot directory). This default file redirects a request for the home page to "/scripts/4disapi.dll/" which will get the home page from PassagePoint. If IIS is being used for other applications, the users will have to enter the server's address plus "/scripts/4disapi.dll/."

## Changing the Default Port

PassagePoint uses Port 80 as the default web server listen port. If you are using IIS with PassagePoint, then you must change the default port to 8080 in PassagePoint.

To Change the Default Port, select File Menu (from the Server Screen) > Database Properties.

1. Select the Web Server I tab.
2. Change the TCP port setting to 8080.
3. Click **OK** to save changes.
4. Exit and re-launch the server application.



## Using IIS on a Separate Server

To run IIS on a separate machine from the PassagePoint Server, follow these steps:

1. Open the 4disapi.ini file and edit it to redirect to the machine with the PassagePoint Server on it.
2. Sample INI file.
3. [Forward]
4. ; 'Hostname' name or address of the server to target
5. ; (localhost= 127.0.0.1)

6. TargetServer=localhost

Replace both "localhost" parts with the name of the server machine running PassagePoint Server. Then replace 127.0.0.1 with the IP address of the server machine running PassagePoint Server.

## Web Server Minimum Processes

PassagePoint Web Pre-Registration can keep a minimum number of web processes idle so that requests are handled as quickly as possible. By default, the minimum number is 10. In most cases, this is enough.

To change this number, select File Menu (on Client) > Configure > Web Server.

1. Click the **Web Server Process Min** button.
2. Enter the new value.
3. Click **OK** to save changes.
4. The server application needs to be restarted to take effect.

## Web Server Maximum Processes

PassagePoint Web Pre-Registration can allow a maximum number of web processes to be created. By default, the maximum number is 300. In most cases, this is enough.

To change this number, select File Menu (on Client) > Configure > Web Server.

1. Click the **Web Server Process Max** button.
2. Enter the new value.
3. Click **OK** to save changes.

The server application needs to be restarted to take effect.

## Modifying HTML Web Pages


The web pages served by PassagePoint are stored on the server in a directory named *Pages inside the IntranetModule Directory*. Because of the way PassagePoint serves these pages, any changes to these pages must be done to the files directly on the server. Be careful not to remove any of the embedded tags used by PassagePoint. It is recommended to use a text editor or high-end html edit tool instead of using other WYSI-WYG tools that may alter the look or functionality of the pages.

## Using Custom Field 1 on Web Page

During the pre-registration process, users can enter data into the Custom Field 1. This field can be used to capture additional information not already requested. To change the title of this field or to make it a required field, refer to the *Custom Fields* section of this manual.

## Default TCP/HTTP Port

PassagePoint Web Pre-Registration uses the default TCP/IP port 80 for web services. This can be changed on the server. If you do change it, you should use a number greater than 3,000. Most port numbers below 3,000 are reserved for standard international use.

<p>Note</p> 	<p>If you are using IIS with PassagePoint, make sure the port number in PassagePoint and the 4disapi.ini file are the same.</p>
---	---

Changing the Default Port Number, select File Menu (from the Server Screen) > Database Properties.

1. Select the Web Server I tab.

2. Change the TCP port setting.
3. Click **OK** to save changes and restart the server.

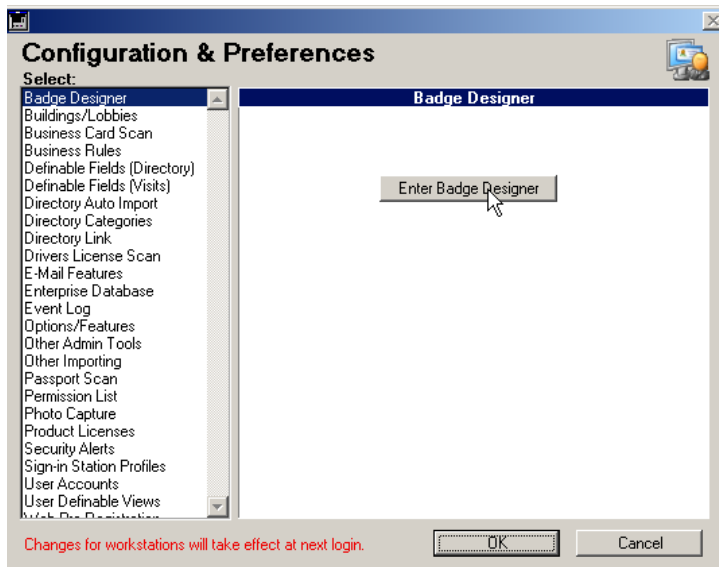


# 6

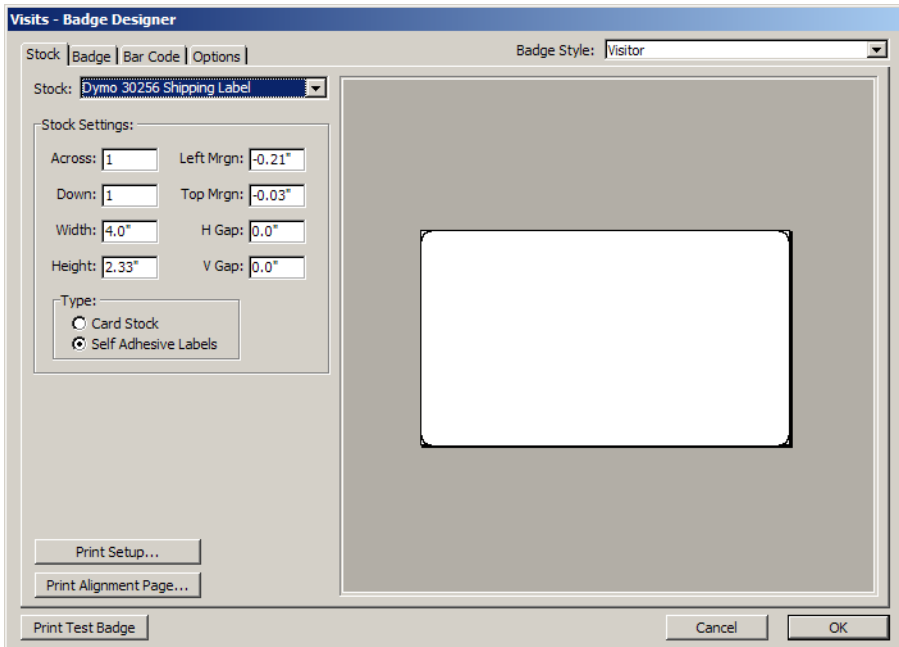
## Badge & Label Design

PassagePoint provides an integrated badge design tool that allows complete control over how the badge looks and what is printed on the badge.

The Badge Designer screen is used to create a template. Once the template is complete, data may be entered into these pre-defined fields. Select File > Configure > Badge Designer.



Select Enter Badge Designer to see the following screen.



## Stock

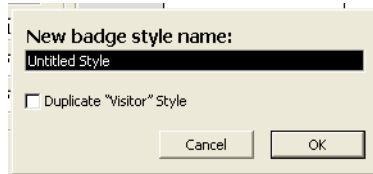
Select the size of the badge stock in the Stock drop-down menu. The most common forms are pre-defined.

Use the Stock Settings to change the dimensions of the stock if needed.

Select Print Setup... to change the printer settings including horizontal or landscape output, the paper size, or the properties of the printer. This screen is the standard printer drivers window.



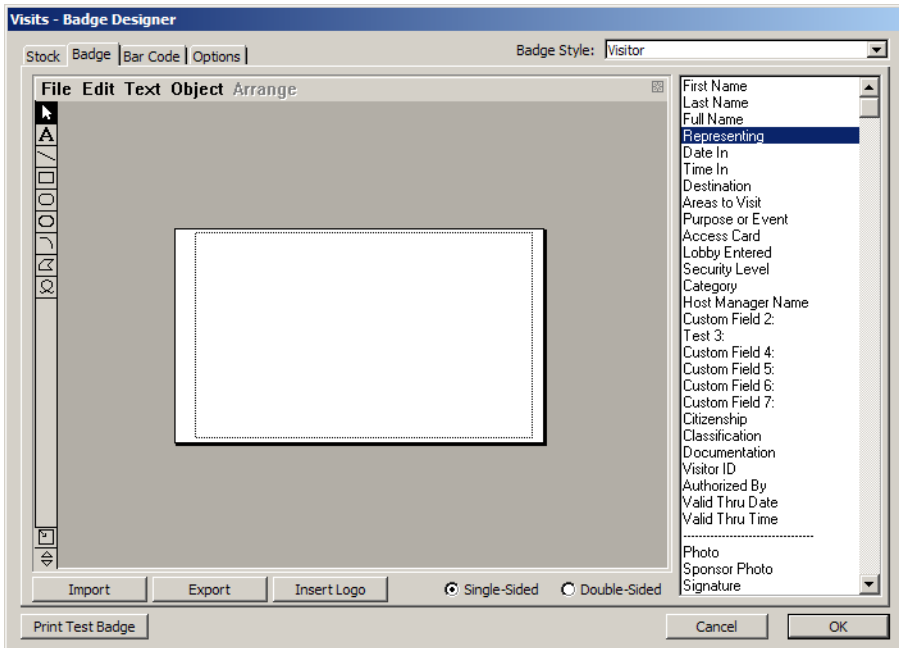
Scroll through the different Badge Styles to change the output of the badge. Badge styles are predefined. Select Create New to design a new badge.



## Parking Pass

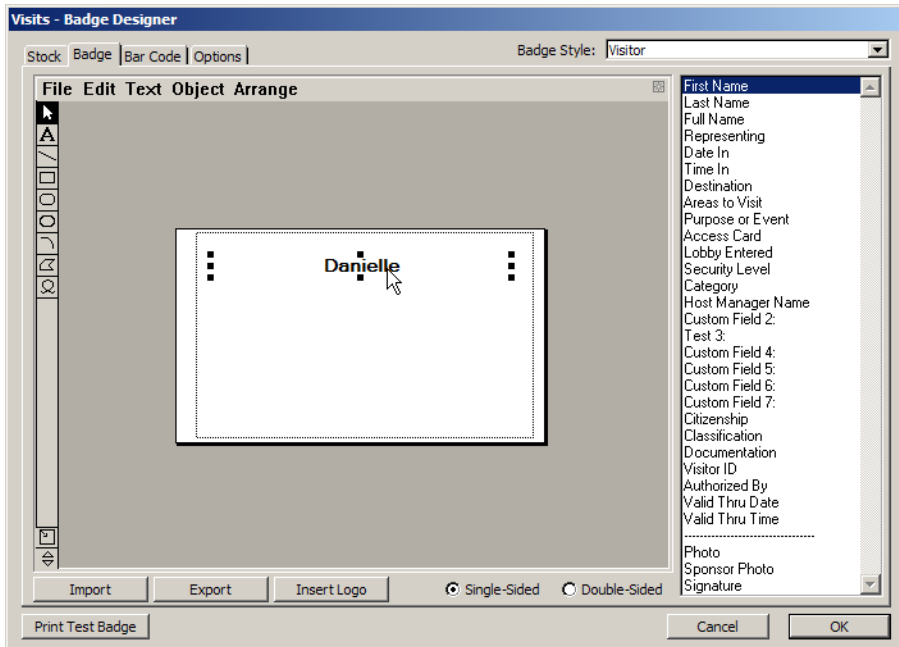
Labels can be created and designed the same way as the visitor badges, however the parking pass must be named "parking".

# Badge



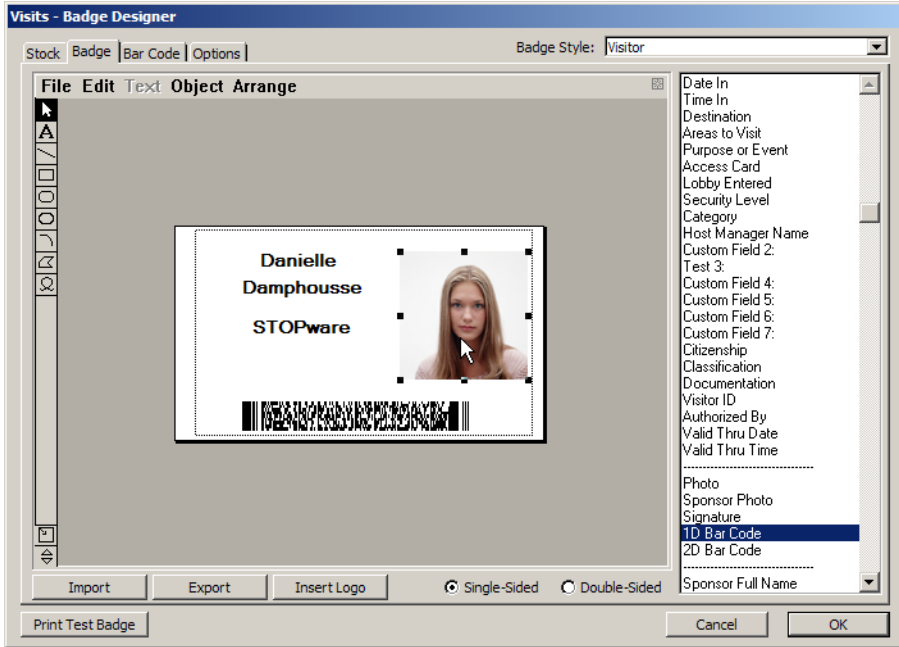
Use the Badge tab to edit the Badge Style chosen in the upper right corner. The fields on the right side of the screen are factory default samples used as placeholders. Double-click or drag and drop the selection on to the badge.

For example, select "First Name", drag and drop it on to the main page. Use the backspace or delete key to remove a field from the badge.

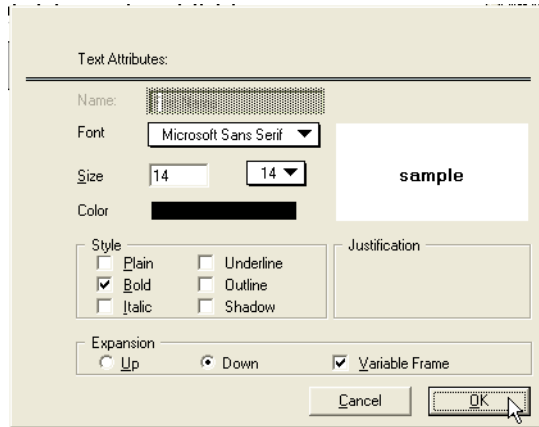


Repeat the process as appropriate to complete the customization of the badge.

In this example, First Name, Last Name, Representing, Signature and Photo were selected. The following example represents the sample selections here:



The Attributes screen is accessed thru the Text > Specifications... menu in the badge designer.



Use the tools on the far left to add static graphics or text to the badge. For example, if a box is drawn with the rectangle tool, or if text is added using the "A" tool, these items are added as static objects and will not change at print time. This option is similar to creating a master page - the fields added from the right may be modified, however the static graphics and text input may not.

Select Edit to perform standard processes including Copy, Paste, Clear and Duplicate.

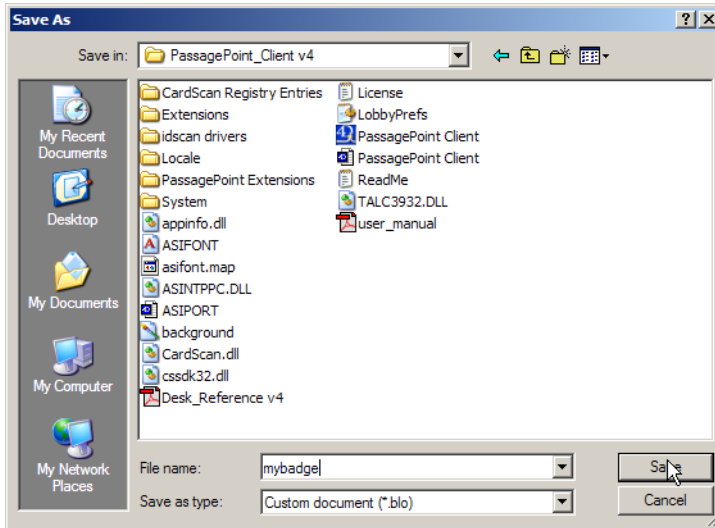
Select Text to modify the Font, Size, Style or Justification of the text on the badge.

Select Object to change Line Patterns Colors, Width or other object oriented settings including shaping, smoothing or rotating. This menu option is object specific.

Select Arrange to move the text or object, including Bring to Front, Align, Flip or Group/Ungroup.

Select Import to import a previously designed badge.

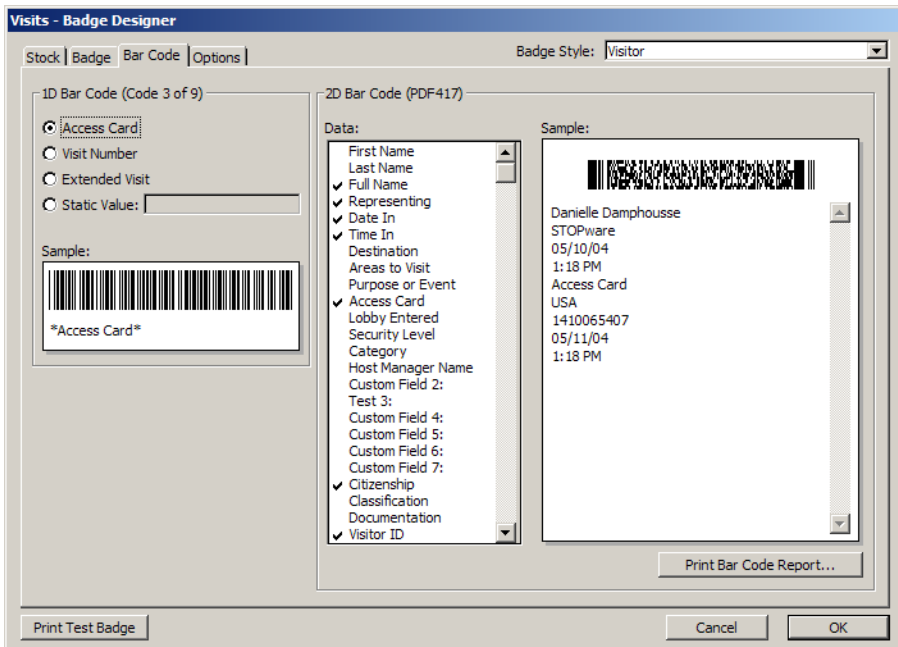
Select Export to export this badge design to a file.



Select Insert Logo to view a window to locate the file for insertion. The supported formats are .bmp, .jpg and .gif.

Select single- or double-sided as appropriate.

## Bar Code



## 2D Barcode

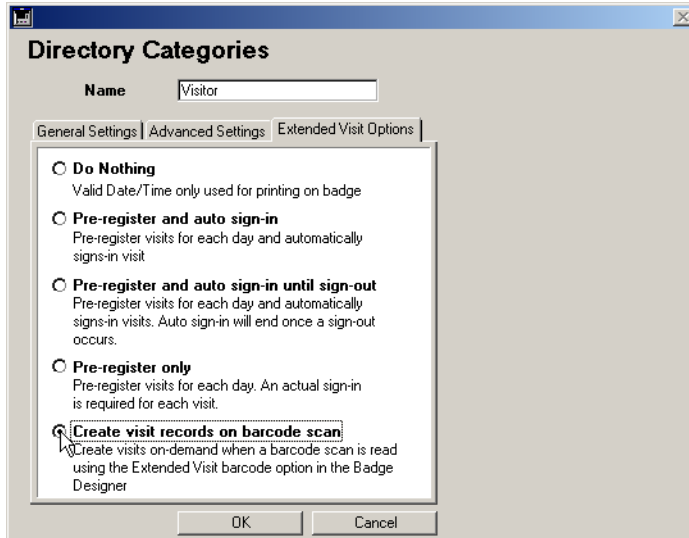
Select Data from the left window to change the barcode. The checkmark means "selected". Remove the selection from the Sample screen by clicking on the selection in the right window again (remove the checkmark). By selecting the data, the barcode changes to reflect the new information.

## 1D Barcode

Select the type of Barcode in the 1D Barcode window.

## Extended Visit

Select the Extended Visit option to link the Create visit records on barcode scan option found in the Directory Categories > Extended Visit Options tab.



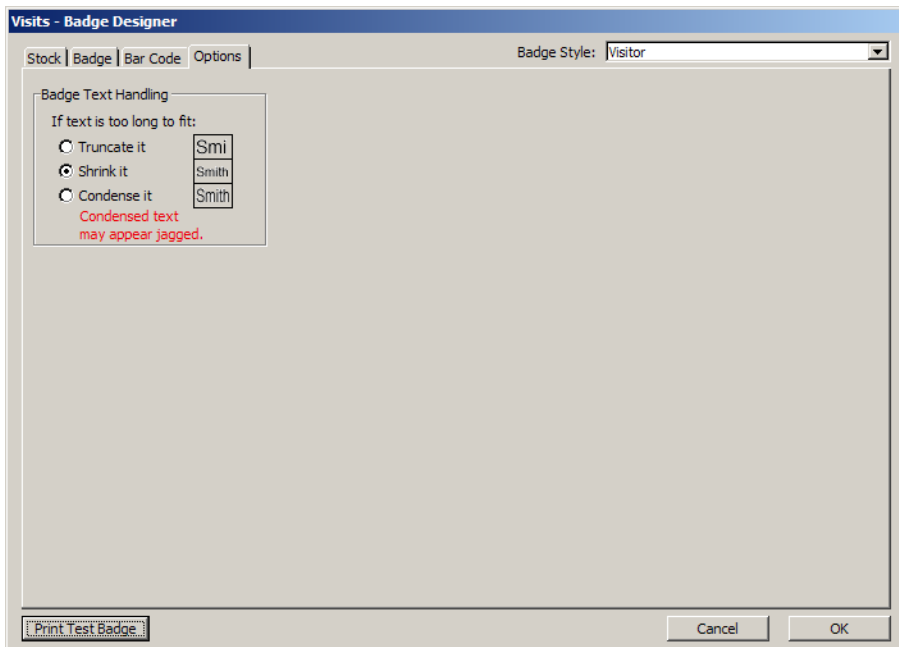
Refer to “Extended Visit Options” on page 155 for more information.

## Static Value

Enter a value in the Static Value field to produce barcodes that represent that value every time.



# Options



Select a style for reducing text on a badge as shown.

Click OK when complete.



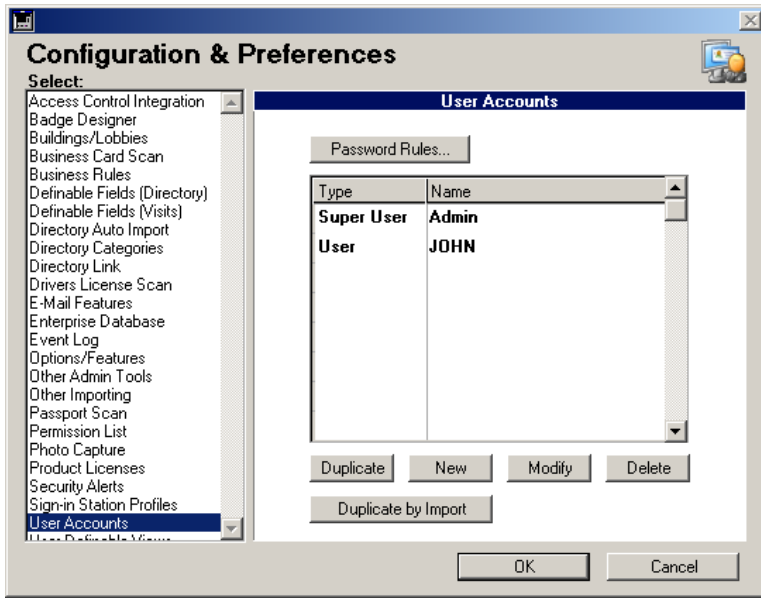
# 7

## User Accounts & Passwords

PassagePoint allows you to have various user accounts and passwords. Each account can have different access levels and preferences. Also, multiple users can "share" the same user name and password. This way, you can decide if you want to have a different user name and password for each user or one user name and password that is shared by many. By default, there is a user account called "admin." This is the administrator's account or Super-User. At the time of the first launch, the "admin" password is left blank. The setup wizard will then ask you to set a new password. You must be logged in as the admin user to add new users.

### Managing User Accounts

To Manage User Accounts, select File menu > Configure > User Accounts.



## Adding a New User

1. Login as the Admin user.
2. Go to File menu > Configure > Users Accounts.
3. Click the **New** button.

## Modifying a User


1. Login as the Admin user.
2. Go to File menu > Configure > Users Accounts.
3. Select a user to modify.
4. Click the **Modify** button.

## Deleting a User

1. Login as the Admin user.
2. Go to File menu > Configure > Users Accounts.
3. Select a user to delete.
4. Click the **Delete** button. A dialog will appear asking if you want to delete this user.
5. Click the **OK** button.

## Duplicating a User

1. Login as the Admin user.
2. Go to File menu > Configure > Users Accounts.
3. Select a user to duplicate.

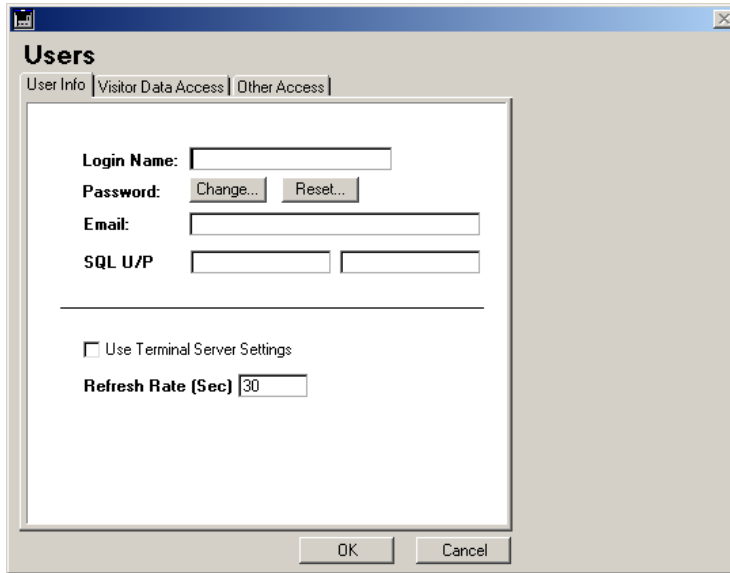
<p>Note</p> 	<p>The Super-User cannot be duplicated.</p>
---	---

4. Click the **Duplicate** button. A dialog will appear asking if you want to duplicate this user.
5. Click the **OK** button.
6. The duplicated user record will open.

## Duplicate a User with the Import function

1. Login as the Admin user.
2. Go to File menu > Configure > Users Accounts.
3. Select a user to duplicate.
4. Click the **Duplicate by Import** button
5. Click **OK** to continue
6. Open a .txt file with tab-delimited information ("username" Tab "password"), for example, "JoeSecurityGuard" > "password".
7. The new users appear in the user list.

## User Info



The screenshot shows a Windows-style dialog box titled "Users". It has three tabs: "User Info" (selected), "Visitor Data Access", and "Other Access". The "User Info" tab contains the following fields and controls:

- Login Name:** A text input field.
- Password:** A text input field with two buttons: "Change..." and "Reset..."
- Email:** A text input field.
- SQL U/P:** Two text input fields.
- Use Terminal Server Settings
- Refresh Rate (Sec):** A text input field containing the value "30".

At the bottom of the dialog box are "OK" and "Cancel" buttons.

### Login Name

The Login Name is a required field. The login can be unique to one individual or can be shared by many people. The Login is not case sensitive.

### Passwords

A password can be added to the user account but is not required. These passwords follow the Password Rules set in the User Accounts screen.

## Resetting the Password


This will reset a user's password to the default password as specified in Password Rules.

Select File Menu (from the Server Screen) > Database Properties.

1. Login as the Admin user.
2. Go to File menu > Configure > User Accounts.
3. Select a profile and click **Modify**.
4. Click the **Reset** button. A dialog will appear confirming that the password has been reset.
5. Click the **OK** button to save the changes.

## Changing the Password: Admin

1. Login as the Admin user.
2. Select File menu > Configure > User Accounts.
3. Select a profile and click **Modify**.
4. Click the **Change** button. A password screen will appear.
5. Enter the current password (if any) and enter the new password twice.

<p>Note</p> 	<p>Passwords are case sensitive.</p>
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6. Click the **Change** button.
7. Click the **OK** button to see changes.



## Changing the Password: Users

Users may change their password anytime. To Change a Password, select File > Change Password.

1. Enter you current password.
2. Enter the new Password two times.
3. Click the Change button.

<b>Note</b> 	Passwords are case sensitive.
--	-------------------------------

## Email Address

Enter the Email address for the individual or workstation. This Email address will be used as the "From" address when sending visitor announcement Emails. If the Email address is left blank, the default Email address will be used. Please refer to the *Email Features* section of this manual for more information about these features.

## SQL U/P


These fields are used for PassagePoint Enterprise Edition. Please refer to the Enterprise Addendum for more details.

## Use Terminal Server Settings

This checkbox should only be used if the user account will always be using an NT Terminal Server connection along with Citrix to log into PassagePoint. Please refer to the *Advanced Topics* section of this manual for more information.

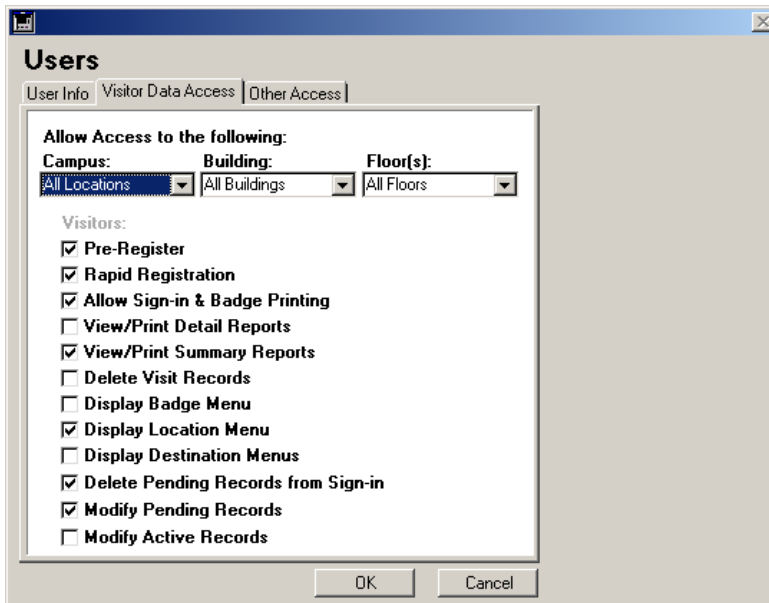
## Refresh Rate

The Refresh Rate is usually set at 30 seconds. This is the amount of time between updates (if any needed) to the lists in the Explorer screen. If a user does not require frequent updates, then this setting can be increased.

<p><b>Note</b></p> 	<p>If you are using Visitor Sign-in Stations, keep the Refresh Rate at two seconds for all users.</p>
--	---

## Visitor Data Access

The administrator can set access levels for users and restrict which features are available to each user.



## Allow Access to the Following

The Campus, Building, Floor menus are used to restrict access to visitor data based on physical location.

### Restricting Access

1. Start with Campus and select a campus. Refer to the *Buildings and Lobbies* section of this manual for information about creating a campus.
2. Select a building or leave it at the default "All Buildings" (within the campus selected).
3. If a building was selected, the floor can be used to limit access to a specific floor or a group of floors. Please refer to the *Buildings and Lobbies* section of this manual for information about creating a floor group.

### Pre-Register

This option allows access to the Pre-Registration menu item under the Visits menu. This allows a user to pre-register visitors and view the pending visits report.

### Rapid Registration

This option allows access to the Rapid Registration menu item. This allows a user to view pending visits for the day and shows the active visitors.

### Allow Sign-in and Badge Printing

This option allows a user who has access to the Rapid Registration screens to enter visitors and print badges.

## View/Print Detail Reports

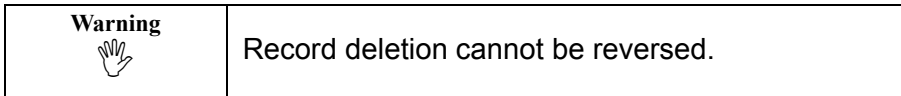
This option allows a user to view and print detailed information about past visits for the locations they have access to. Some of these reports include: Daily Visitor Log, Current Visits, All Visits and custom reports.

## View/Print Summary Reports

This option allows a user to view and print summary information about past visits for the locations they have access to. Some of these reports include: Traffic Report Summary and Daily Traffic Graph.

## Delete Visit Records

This option allows the user to delete ANY visitor from the database.



## Display Badge Menu

This option displays the badge design menu in the Entry screens. This is used when multiple badge designs are used.

## Display Location Menu

This option displays the Show menu in the Rapid Registration screens. This is used to view visitors from different buildings.

## Display Destination Menus

This option displays the destination menus in the Entry screens. In most cases, this should not be used because the destination is automatically stamped by PassagePoint.

## Delete Pending Records from Sign-in


This option allows a user to delete a pending visitor in the Explorer screen.

## Modify Pending Records

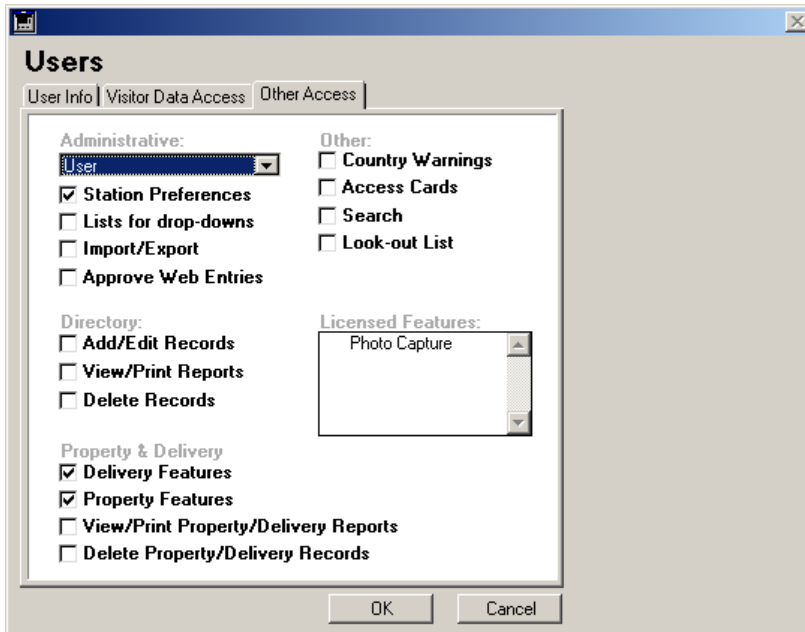
This option allows a user to make changes to pending or pre-registered visitors before signing them in.

## Modify Active Records

This option allows a user to make changes to active visit records.

<p><b>Note</b></p> 	<p>Only the Super-User can make changes to historical records.</p>
--	--

## Other Access



Select the pulldown arrow to view the administrative levels.

Select **Local Admin** to configure user accounts and badge designers of local facilities. For example, with a facility in New York and a facility in San Francisco, using Local Admin has the privilege of configuring of either one or the other.

Select **Admin** to have the highest privileges, including all configurations system-wide.

Selecting **User** blocks the ability to configure the system. This is the default privilege.

## Station Preferences

This option allows the user to select the Station Preferences menu item from the File menu. This is used to make workstation specific settings.

## List for Drop-downs

This option allows the users to select the Edit Lists menu item from the File menu. This is used to edit the defaults for various used in PassagePoint.

## Import/Export

This option allows the user to select the Import Directory and Export menu items from the File menu. Please refer to the *Import and Export* sections of this manual for more information.

## Approve Web Entries (Web Pre-Registration Module Only)

This option allows the user to select the Approve Web Entries from the Report Manager. This is used to show entries made using the Web Pre-Registration and approve those entries so the reception staff can gain access. Please refer to the *Web Pre-Registration Web Pre-Registration Configuration* section of this manual for more information.

## Add/Edit Directory Records

This option allows the user to select the Add Directory Record menu item. This is used to add employees, contractors, etc. to the directory for use as a host or sponsor.

## View/Print Directory Reports

This option allows the user to View and Print reports for the Directory.

## **Delete Directory Records**

This option allows the user to delete directory records.

## **Delivery Features**

This option displays the Delivery menu giving access to the Delivery feature.

## **Property Features**

This option displays the Property menu giving access to the Property feature.

## **View/Print Property & Delivery Reports**

This option allows the user to View and Print reports in the Delivery and Property menus.

## **Delete Property & Delivery Records**

This option allows the user to delete Delivery and Property records.

## **Country Warnings**

This option allows the user to select the Warnings menu item from the File menu. This is used to enter country specific information or warnings.

## **Access Cards**

This option allows the user to select the Access Cards menu item from the File menu. This is used to manage the Access Cards feature.

## **Search**

This option allows the user to select the Search menu item. This is used to perform searches on the database for reporting.



## Look-out List

This option allows the user to select the Look-out List menu item from the Visitors menu. This is used to manage the Look-out List feature.

## Licensed Features

The licensed featured list will only become visible if you have already entered the serial numbers for the photo capture or access control or some other feature-based serial number. The licensed features list allows the administrator to decide which users are allowed to use these licenses.

To Select a Licensed Feature, select File > Configure > User Accounts.

1. Select the user account you wish to use and click the **Modify** button.
2. Click the Other Access tab.
3. From the licensed feature list, select the feature (i.e. Photo Capture) that you wish to give to this user.  
A checkmark will appear next to the features selected.
4. Click **OK** to save your changes.

## Password Rules

PassagePoint is protected with a very flexible and advanced user password system. For most organizations, basic user names and passwords will satisfy the need for user access control. For some organizations, however, a more advanced set of password rules are required.

To Set Password Rules, select File menu > Configure > User Accounts.

1. Click the **Password Rules** button.
2. Select your settings.
3. Click **Save** to close the window and save your changes.

**User Authentication Rules**

**Login Rules**

- Login Name must match NT Domain Login Name.
- One session per Login Name.
- Account lockout threshold:  attempts
- Use LDAP Authentication
  - Server Address:
  - Search Base:

**Password Rules**

- Must not contain the Login Name.
- Minimum password length:  characters
- Maximum password length:  characters
- Default password expiration period:  days
- Previous password re-use threshold:  passwords
- Historical password re-use threshold:  days
- New users must change password on first login.
- Default password:  User Name or

**Regular Expression Password Filter**

These regular expressions are evaluated when a new password is entered. If any of these expressions match, the new password is rejected.


## Login Rules

- **User Name must match NT Domain Login name.** This option requires that the PassagePoint login name must match the NT Domain login name currently logged into the workstation. This feature prevents a user from accessing PassagePoint without first logging into the NT Domain with their own user account.
- **One session per User Name.** This option prevents the use of the same user account by more than one person or multiple sessions by the same person.
- **Account Lockout threshold.** This setting allow you to set a maximum number of login attempts before PassagePoint exits and requires the user to re-launch PassagePoint.

## LDAP Setup

Use LDAP Authentication (refer to “User Authentication using LDAP” on page 65 for more information.) Select this box to use an LDAP server for authentication on user accounts. This option passes the user’s login and password to the LDAP server for authentication. Configure the server address and search base settings as needed.

A user account in PassagePoint is required for each LDAP user that needs access to PassagePoint. When creating the user account, make sure the login name matches the LDAP login name.

<p>Note</p> 	<p>All other password rules will only apply to sign-in stations.</p>
---	--

## Password Rules

- **Must not contain the user name.** This option prevents a user from having a password that is the same as their login name.
- **Minimum password length.** This setting allows you to set the minimum number of characters that a password can be.
- **Maximum password length.** This setting allows you to set the maximum number of characters that a password can be.

- **Default password expiration period.** This setting allows you to set an expiration period for passwords. The setting is expressed in number of days. Once a user has a password for the set number of days, Passage-Point will require them to set a new password.
- **Previous password re-use threshold.** This setting allows you to restrict the re-use of passwords. The setting is expressed in a number of passwords. For example, if the setting is three (3), a user would be required to use a unique password three time before they could re-use an older password.
- **Historical password re-use threshold.** This setting allows you to restrict the re-use of passwords. The setting is expressed in a number of days. For example, if the setting is ninety (90), a user would be required to use a unique password during the last ninety days before they could re-use an older password.
- **New users must change password on first login.** This option requires that new users change their password the first time they login.
- **Default password.** The default password can either be their login name or a specified value. Enter the default password value into the field or click the User Name option to activate this option.

## Regular Expression Password Filter

The Regular Expression Password Filter allows for advanced password filtering. It is possible to enter almost any sort of restriction on passwords using this filter. For more information on Regular Expression syntax, check your local book store or references online.

Examples:

- |              |   |
|--------------|---|
| .*secret.*   | this would prevent the use of the word “secret” as a password   |
| .*password.* | this would prevent the use of the word “password” as a password |
| .*stopware.* | this would prevent the use of the word “stopware” as a password |

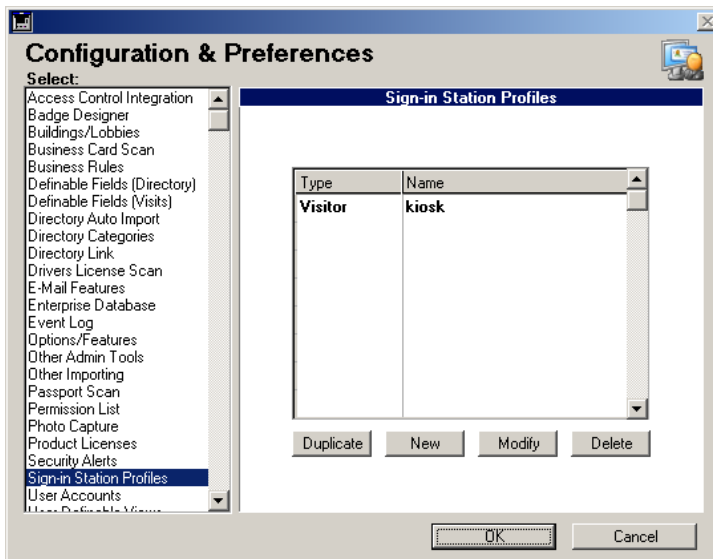
# 8

## Sign-in Station Profiles

PassagePoint allows you to create Sign-in Station Profiles that use a special interface for visitor self-registration. A Sign-in Station Profile can be tailored in many ways to work and look just the way you want. In most cases, one Sign-in Station Profile is all that is needed, even for multiple locations. If necessary, additional profiles can be created for varying requirements in locations.

### Managing Sign-in Station Profiles

To Manage Sign-in Station Profiles, select File menu > Configure > Sign-in Station Profiles.



## Adding a New Sign-in Station Profile

1. Login as the Admin user.
2. Select File menu > Configure > Sign-in Station Profiles.
3. Click the **New** button.

## Modifying a Sign-in Station Profile

1. Login as the Admin user.
2. Select File menu > Configure > Sign-in Station Profiles.
3. Select a profile to modify.
4. Click the **Modify** button.

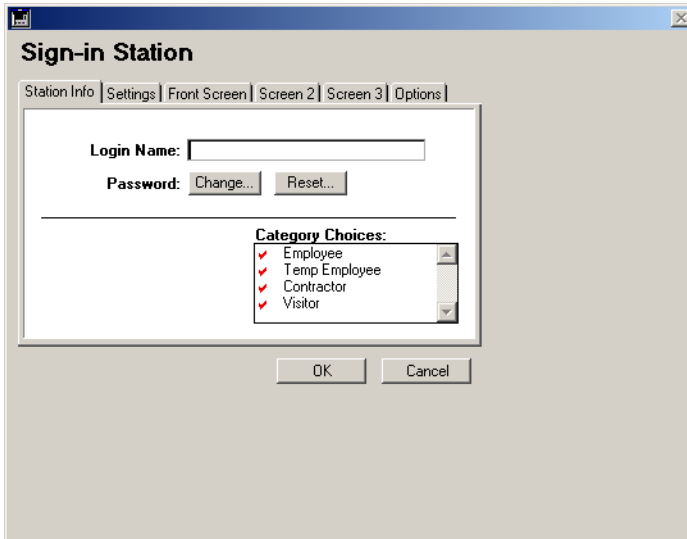
## Deleting a Sign-in Station Profile

1. Login as the Admin user.
2. Select File menu > Configure > Sign-in Station Profiles.
3. Select a profile to delete.
4. Click the **Delete** button. A dialog will appear asking if you want to delete this profile.
5. Click the **OK** button.

## Duplicating a Sign-in Station Profile

1. Login as the Admin user.
2. Select File menu > Configure > Sign-in Station Profiles.
3. Select a profile to duplicate.
4. Click the **Duplicate** button. A dialog will appear asking if you want to duplicate this profile.
5. Click the **OK** button. The duplicated profile will appear.

## Sign-in Station

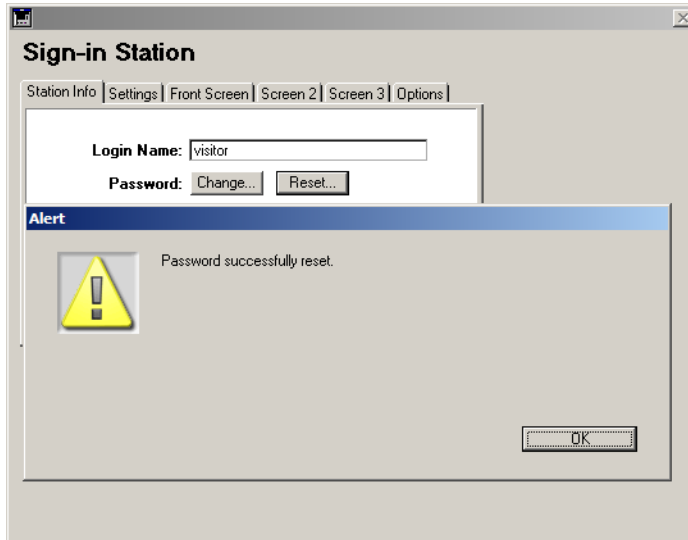


The screenshot shows a dialog box titled "Sign-in Station" with a tabbed interface. The tabs are "Station Info", "Settings", "Front Screen", "Screen 2", "Screen 3", and "Options". The "Settings" tab is active. It contains a "Login Name:" text box, a "Password:" label with "Change..." and "Reset..." buttons, and a "Category Choices:" list box. The list box contains four items: "Employee", "Temp Employee", "Contractor", and "Visitor", each with a red checkmark. At the bottom of the dialog are "OK" and "Cancel" buttons.

### Login Name

The Login Name is a required field and is not case sensitive.

## Passwords



A password can be added to the sign-in station profile but is not required. These passwords till follow the Password Rules set in the User Accounts screen.

### Reset the Password


This will reset a station's password to the default password as specified in Password Rules.

1. Login as the Admin user.
2. Select File menu > Configure > Sign-in Station Profiles.
3. Select a profile and click **Modify**.
4. Click the **Reset** button. A dialog will appear confirming that the password has been reset.
5. Click the **OK** button to save the changes.



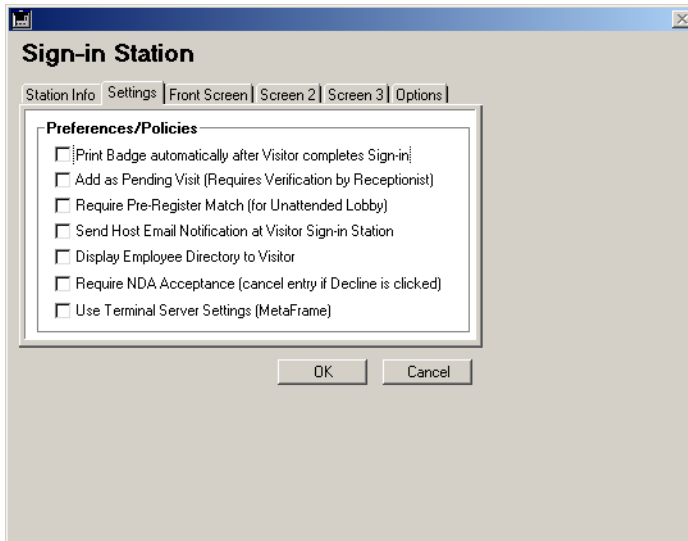
## Changing the Password

1. Login as the Admin user.
2. Select File menu > Configure > Sign-in Station Profiles.
3. Select a profile and click **Modify**.
4. Click the **Change** button.
5. A password screen will appear. Enter the current password (if any) and enter the new password twice.

<p>Note</p> 	<p>Passwords are case sensitive.</p>
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6. Click the **Change** button.
7. Click the **OK** button to see changes.

## Settings



### **Print Badge automatically after Visitor completes Sign-in**

This option will print a badge once the visitor has completed the sign-in process. This applies only if the category selected by the visitor has the "Print by Default" option selected. Please refer to the *Directory Categories* section of this manual for more information.

### **Add as Pending Visit (requires verification by receptionist)**

This option is used when you want the receptionist to verify the "pending" visitor's information before completing the sign-in process. If this option is not checked, the visitor will become an "active" visitor.

### **Require Pre-Register Match (for unattended lobby)**

This option is for an unattended lobby with a visitor sign-in station. It requires that visitors be pre-registered prior to arrival. If the visitor name is found, the sign-in is complete, a badge prints (if selected) and the host gets notified via Email (if available).

## **Send Host Email Notification at Visitor Sign-in Station**

This option will send an automated email to the host's email address (from the host's directory record) as soon as the visitor completes the sign in process.

## **Display Employee Directory to Visitor**

This option will show the employee list to the visitor if they need to look-up the correct spelling of a Sponsor's name. Check with your company's security policy before selecting this option.

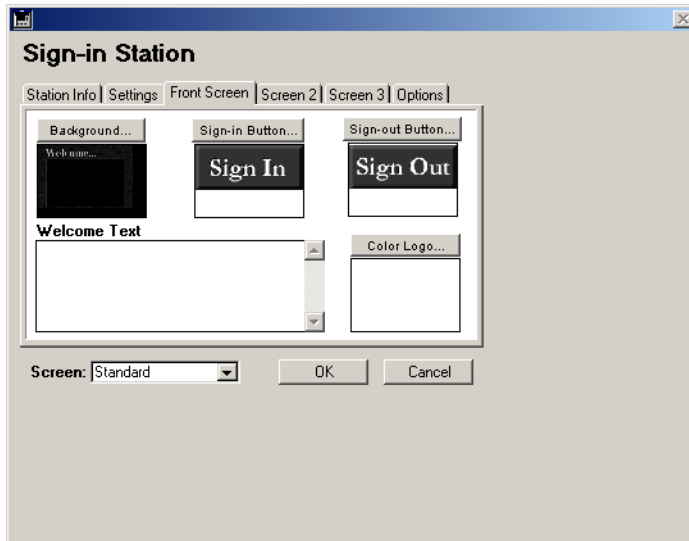
## **Require NDA Acceptance (cancel entry if decline is clicked)**

This option is used with the NDA feature. It requires that the NDA or Visitor Agreement be accepted before saving the entry.

## **Use Terminal Server Settings**

This checkbox should only be selected if the user account will always be using an NT Terminal Server connection along with Citrix to log into PassagePoint. Please refer to the *Advanced Topics* section of this manual for more information.

## Front Screen



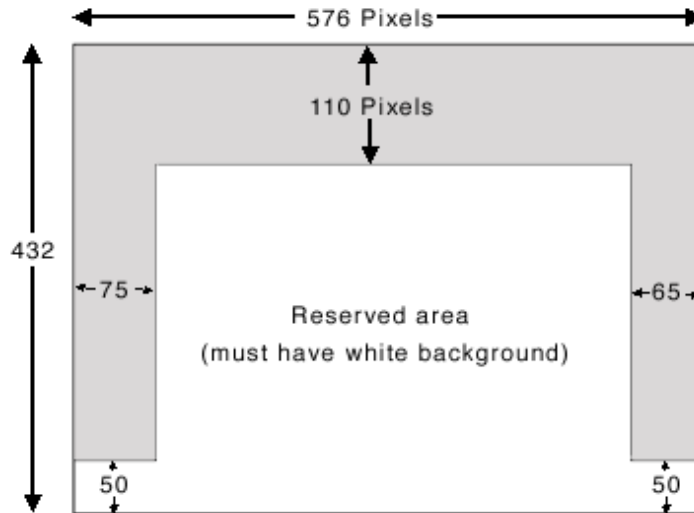
### Background Graphic

The Sign-In station profile has a default "look and feel" when it is created. This is achieved using a background graphic which can be replaced with your own custom "look and feel" graphic. In most cases, adding a Color Logo to the default look will achieve a custom look. See *Color Logo* later in this section for more information. To replace the background graphic, the following guidelines must be followed to ensure functionality.

You may load the following graphic formats: JPG, GIF, BMP, PICT. If you have any problems loading the graphic image, convert it to JPEG and try again.

The size of the background image must be 576 pixels wide and 432 pixels tall. The resolution of the graphics must be set to 72 dpi. The background graphic "sits" behind the other objects on the sign-in screen.

The center area is reserved for the functional objects such as buttons and fields. This area should always have a white background. Please refer to the specifications below before designing your own screen.



## Replace the background image

1. Click the **Background** button.
2. Select a graphic file or copy your image to the clipboard and paste it into the background field.

## Buttons

The Sign-In and Sign-out button graphics can be replaced with your own graphics to match the background image. The button must be 130 pixels wide and 55 pixels tall.

## Replace the button graphics

1. Click the **Sign-in** or **Sign-out** button.
2. Select a graphic file or copy your image to the clipboard and paste it into the button field.

## Welcome Text

Text may be added to the front screen of the Visitor Sign-in Station. Use this to welcome visitors or provide instructions. The text is displayed in the center of the visitor screen just above the Sign-in and Sign-out buttons.

### Enter text

1. Type the text into the Welcome Text field.
2. Re-launch the visitor sign-in profile to see the changes.

## Color Logo

A logo or graphic can be added to the front screen design. The graphic will be displayed just below the Sign-in and Sign-out buttons.

## Adding a logo or graphic

1. Click the **Color Logo** button.
2. Select a graphic file or copy your logo and paste it into the color logo field.

## Screen

The Screen menu is used to select the screen template to use for the Visitor Sign-in Station Interface. The default setting is the "Standard" screen. On the Professional Edition, other options such as "Language" and "Touch Screen" are available. In very special cases, the custom option is used.

## Screens 2 & 3

**Sign-in Station**

Station Info | Settings | Front Screen | **Screen 2** | Screen 3 | Options

Req'd	Label	Field Association	Default Value
	Category:	Visitor Category	Visitor
	Your Name:	First and Last Name	
<input type="checkbox"/>	Representing:	Representing	
<input type="checkbox"/>	Sponsor or Host:	Employee Sponsor	
<input type="checkbox"/>	Citizenship:	Citizenship	USA

\* Note: This option is not available for Language Screen

OK Cancel

**Sign-in Station**

Station Info | Settings | Front Screen | Screen 2 | **Screen 3** | Options

Req'd	Label	Field Association	Default Value
<input type="checkbox"/>	City	Custom Field 3:	
<input type="checkbox"/>	License	Custom Field 4:	
<input type="checkbox"/>	Expiration	Custom Field 5:	
<input type="checkbox"/>		Not Used	

Note: To show more rows, select a field name from the last choice list

OK Cancel




## Fields on Visitor Sign-in Screen

PassagePoint allows you to decide which fields should be displayed on the visitor sign-in screen. Once the visitor clicks the **Sign-In** button, they are shown screen 2 and 3 (if needed). This is where they enter the information you wish to capture. The category and name are always the first to be shown. You decide the rest.

## Editing or Adding a Field to the Screen

1. Select the field from the menu.
2. Enter the "Label" or "Title" of the field next to that field. For example, you can change "Sponsor or Host" to "ABC Company Host."
3. To enter a default value, enter it into the field to the right of the field menu.
4. To make the field required, check the box to the left of the field label.

<p><b>Note</b></p> 	<p>It is recommended to keep the number of fields to a minimum so that the visitor can quickly and easily complete the process.</p>
--	---

## Special Considerations

Visitor Sign-In stations are designed to be dedicated as kiosks for visitors to self-register. To make the visitor's experience as fast and simple as possible, there are some special settings to consider when setting up the sign-in computer. For example, it is important to take special steps to reduce the chances that the visitor will explore the desktop, or worse. Consider the items below when setting up the visitor sign-in station.

## Power Settings & Screen Savers

By default, power saving is usually turned on. This can cause the hard drive to spin down when the computer is sitting idle. When a visitor tires to use the computer, there will be a delay while the hard drive spins up again. To avoid this delay, turn off the power saving settings.

A screen saver can cause confusion when the visitor is directed to sign-in. It is recommended to leave the screen saver off.

## Hiding the Task Bar

On the visitor station, the task bar does not need to be displayed. It is recommended that you set the Task Bar to "auto hide" and de-select the "always on top" options. This will reduce the chances that the visitor will access the task bar and make unwanted changes. To hide the task bar, select Start Menu > Select Settings > Select Taskbar & Start Menu.

1. Select Auto Hide.
2. De-select Always on Top.
3. Click **OK** to save changes.

## Setting Display Resolution

The visitor's screen is designed for a monitor set at 640 x 480 resolution. This is due to the fact that many people have difficulty reading computer screens. This resolution setting makes the objects on the screen large enough so that most visitors can easily read the screen. This setting will also allow you to use a smaller monitor such as a 12" or 14" monitor and still have a sufficient viewable area. To change your monitors settings, right-click on the desktop or select Display from the Control Panel.

1. Select Properties from the menu and make your changes.
2. Click the **Apply** or **OK** button.

# 9

## Importing & Exporting Data


PassagePoint allows you to import the directory data from a text file. This can be done manually or automatically.

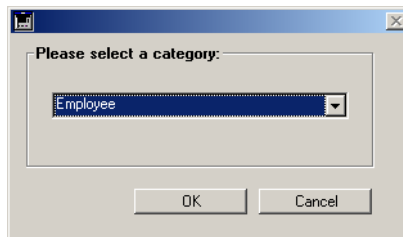
### Manually Importing Directory Data

You can import directory data into PassagePoint at any time by selecting Import from the file menu.

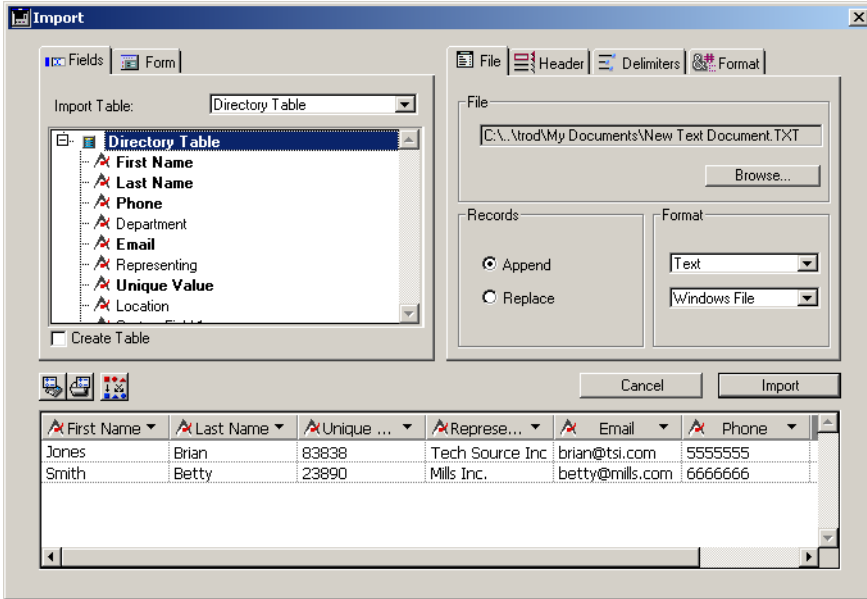
To import directory data, follow these steps:

1. Select the Default Category to be used for the imported records and click **OK**.

<p><b>Note</b></p> 	<p>Only the categories with the option "Can be added to the Directory" selected are shown. Refer to Directory Categories later in this manual for more information.</p>
--	---



2. The Import File window will appear. Select the text file to import and click **Open**.
3. The Import Configure window will appear.



4. Click on the arrow above each column to display a pop-up menu of fields. Select the appropriate field for each column to "map the fields." Select "Not Imported" for any columns you wish to ignore.
5. Make changes to the Header and Delimiters tabs as necessary.
6. Make sure that the Create Table box is not checked.
7. When you are finished mapping the fields, click the **Import** button. This will import the data into the directory.


## Automatic Import Feature

The Auto Import feature is designed to eliminate the need to update the directory information in PassagePoint. Instead, the PassagePoint server will automatically import and update the directory information every day, week, or as often as you want. Each import is compared to the current directory in PassagePoint. New people are added and those with changes are updated. Optionally, people missing from the import can be automatically de-activated. This feature provides hassle-free maintenance of the directory information. To setup the auto import feature, follow these steps:

### Select a Data Source

The first step is to select a data source to export the data from. This data source could be a human resource database, company phone directory, Email directory, security database, or any number of other data sources. Although not required, it is recommended that you choose a data source that has:

- Most current information available
- Unique ID for each person
- First and Last name in separate fields
- Phone number or extension (for host lookup)
- Email address (for Email notification)

<p><b>Note</b></p> 	<p>If the first and last name are in one field, PassagePoint can automatically parse the names if they are in a standard format. Select the Full Name option as the Column header. Automatic parsing will work with the following formats:</p> <p>Last,First Last, First First Last First Last</p>
--	--

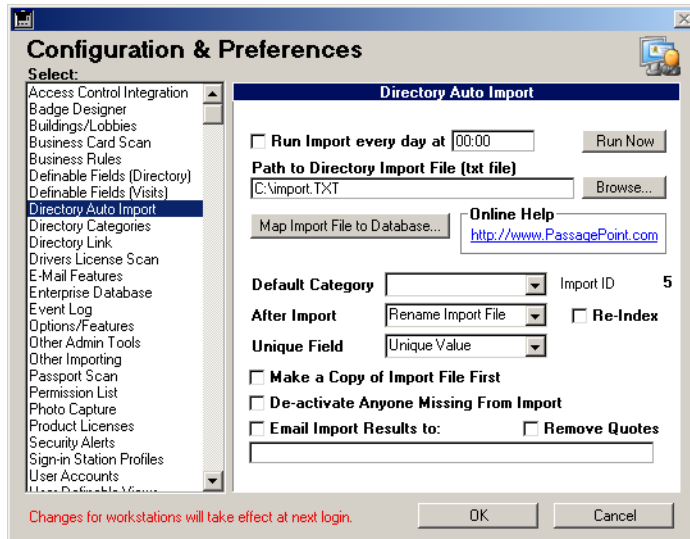
## Create the Import File

Once you have selected your data source, you will need to set up an automated process or batch file for exporting the data into a text file (tab or comma delimited is preferred). The file should be saved in a location that is accessible by the PassagePoint Server (ie. networked hard drive or a local hard drive). The frequency of the update is up to you. PassagePoint will "look" for the file every 24 hours and if it finds it, will proceed to import the data and synchronize. If the file isn't found, it will wait another 24 hours.

## File Formats

A Text file (i.e. "importfile.txt") is the preferred format in PassagePoint. In some cases, this may not be an option. For example, some systems only generate CSV files (i.e. "importfile.csv"). To use a CSV file, follow these steps:

1. Manually change the file name to a .txt file.
2. Complete the Field Mapping as described below using the txt file.
3. Select the "Make a Copy of Import File First" option. This will convert the .csv file to a .txt file prior to import.
4. Manually change the file name back to a .csv file.
5. Reset the Path to point to the .csv file.



## Turn on and schedule Imports


To turn on and schedule the Directory Auto Import, follow these steps:

1. Select Directory Auto Import from the menu.
2. Click on the Run Import every day check box.
3. Enter the time of day to start the import (using 24-hour format).

## Set the Path to the Import File

Since the auto import process is done on the server, the path to the import file should always be set relative to the server. The easiest way to set this path is to launch the client application on the server and follow these steps:

1. Select Directory Auto Import from the menu (in the Configure Screen).
2. Click the **Browse** button and then click **Continue** when the warning is shown.
3. Select the import file. Optionally, you may manually enter the path to the file in the path field.

<b>Note</b> 	The client application should only be used on the server for administrative tasks such as these
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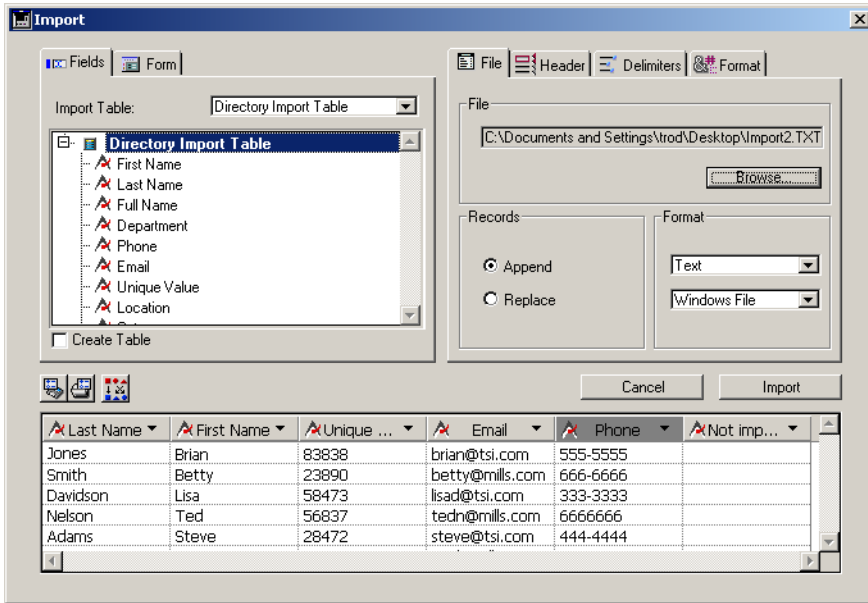
## Map the Import File to PassagePoint

You will need to configure the import so that the import file is "mapped" to the data fields in PassagePoint. Also, you may have fields in the import file that you wish to "ignore" during the import. The import screen will allow you to map the fields, set delimiters, and do a test import. Follow these steps to quickly set up your import:

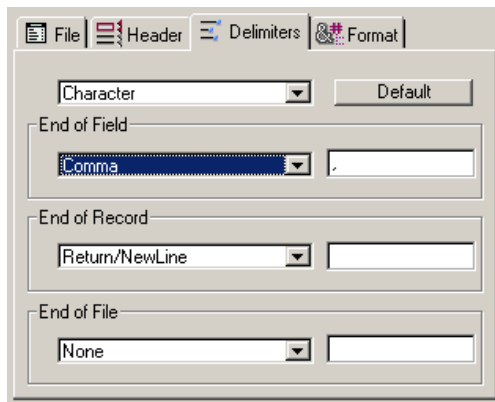
1. From a Client running on the Server, select the import file by following the steps above.
2. Click the **Map Import File to Database** button. Click **Continue** when the warning appears.
3. If the path to the import file wasn't found an Open window will appear. Select the file or click **Cancel** and set the Path with the **Browse** button.



4. The Import screen appears.



5. If the import file is using a Tab to separate fields (Delimiters), then the sample data should display correctly. If it is using another character, change the Delimiters by clicking on the Delimiters tab and changing the options. Refer to the *Delimiters* section below for more information.




- A sample of the data should now be displayed at the bottom of the import screen. The Fields above each row, however, are probably not mapped correctly.

Full Name	Departm...	Not imp...	Phone	Last Name	Not imp...
Jones	Brian	83838	brian@tsi.com	234-5454	
Smith	Betty	23890	betty@mills.com	234-5555	
Davidson	Lisa	58473	lsad@tsi.com	234-2332	
Nelson	Ted	56837	tedn@mills.com	234-6778	
Adams	Steve	28472	steve@tsi.com	234-4334	

- Click on the arrow above each column to display a pop-up menu of fields. Select the appropriate field for each column to "map the fields." Select "Not Imported" for any columns you wish to ignore.

Last Name	First Name	Unique ...	Email	Phone	Not imp...
Jones	Brian	83838	brian@tsi.com	234-5454	
Smith	Betty	23890	betty@mills.com	234-5555	
Davidson	Lisa	58473	lsad@tsi.com	234-2332	
Nelson	Ted	56837	tedn@mills.com	234-6778	
Adams	Steve	28472	steve@tsi.com	234-4334	

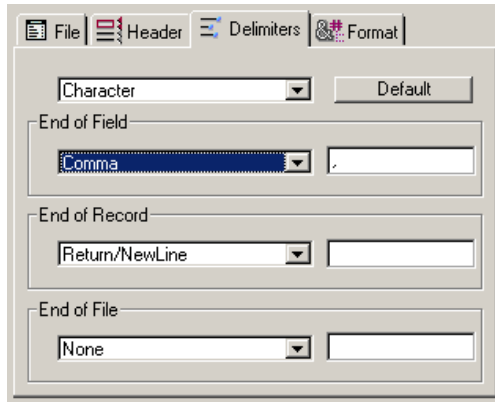
<p><b>Note</b></p> 	<p>Before clicking Import, make sure that the Create Table box is not checked.</p>
--	--

- When you are finished mapping the fields, click the **Import** button. This will do a test import and then return you to the Configure Screen.
- The Auto Import will start at the time scheduled or you can click **Run Now** to perform the import immediately.


## Field/Record Delimiters


PassagePoint uses the Tab character as the default field delimiter and Return/New Line as the default end of record delimiter. These settings can be changed in the Import screen. To Change the Delimiters:

1. In the Import screen, click the Delimiter tab.



2. Change the top menu from Decimal to Character.
3. Use the menus to select correct delimiter or type the character into the field right of the menu.
4. Optionally, you can use the Decimal value of the character if the Decimal menu is selected. (i.e. the Decimal value of a pipe "|" is 124).

<p><b>Note</b></p> 	<p>Import files that are prepared by a Unix based system can leave extra characters that will make setting the delimiters difficult. Make sure that import files are prepared in standard text format for Windows.</p>
--	--

<p>Note</p> 	<p>The default PassagePoint only expects one delimiter character. Therefore, using quotes (" ") around the field data would cause the quotes to be imported as well. To fix this, check the "Remove Quotes" option. This will take the quotes out of the data.</p>
---	--

## Auto Import Options

### Setting the Default Category

This is the default category that will be given to each record that is imported. If a "category" field is imported along with each record then PassagePoint will use that field to determine what category is assigned. If the category is not imported, PassagePoint uses the default setting selected in the Directory Categories page of the Configure screen. To learn more about assigning a category to each record, refer to the *Directory Categories* section of this manual.

### What to do After Importing


Once the import is finished, PassagePoint can leave the import file alone, rename it or delete it. If the Import File is not updated regularly, it is recommended that you select Delete so that PassagePoint can skip the import process until a new import file is available.

### Re-Index after Importing

This option will rebuild the index table each time an import is run. In most cases, this isn't required.

## Setting the Unique Field

The Unique field is used to compare new records with existing records. Select a unique field that is included in the import file. By default, this should be the Unique Value that is imported with each record. Ideally, this would be an ID such as the employee number.

<p><b>Note</b></p> 	<p>If you are importing the Web User ID with each record, this can be a good second option.</p>
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## Making a Copy First

This option will make a copy of the import file, save it as text format and then import the data. You may also choose to delete the copy after the import. This option is useful if the import file is not a "txt" file.

## Deactivate Setting

This option will "deactivate" any one that is not included in the Import File for the default category. This way, the directory will always be up-to-date with not only new hires but also with terminations.

## The Import ID

The Import ID is used in the synchronization process. The ID will be incremented by one each time the import is run. Each directory record that gets imported will have the Import ID of its last import.

## Setting up an Email Based Report After Import

This will send an Email report to the Email address entered with the results of the import process. It is recommended that this be used when you first set it up. Once you are confident that everything is working properly, you can turn off the report. To Send the Email Report:

1. Select Directory Auto Import from the menu.
2. Click the Email box to receive a daily Email report.
3. Enter the Email address(es) to send the report. Separate multiple addresses with a comma.

## Remove Quotes

This option will eliminate any quotes in the data. If you are importing a comma, quote file, use this option.

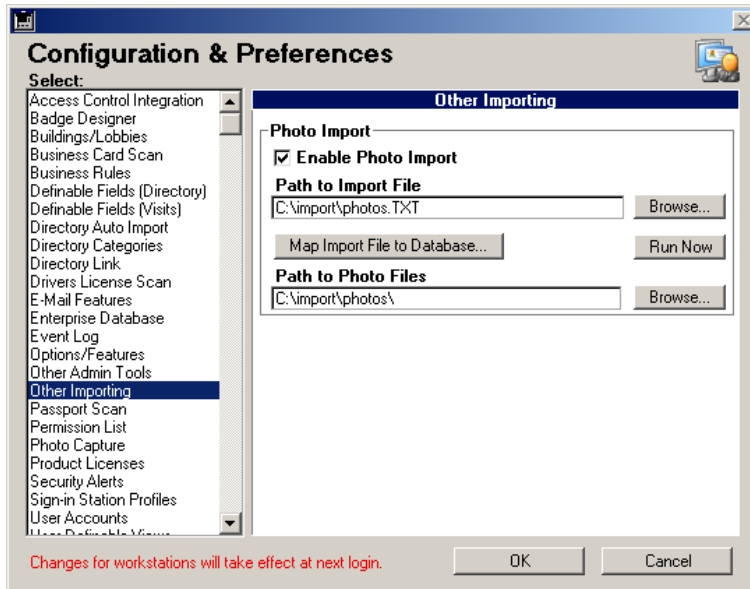
## Photo Import

PassagePoint allows an easy way to import photos into the directory. This can be done manually or automatically when the Directory Auto Import starts. In order to setup the import, you must first have the Photo feature enabled. Please refer to the *Photo Features* section of this manual for information on how to enable this feature.

To Import photos, you must have the following items:

- The photo files located in a directory that is accessible from the server.
- The photo files must be in a standard format such JPEG or BMP.
- A Unique Value (i.e. Employee ID) in each directory record.
- A text import file that includes the Unique Value (i.e. Employee ID) and file name of the associated photo file.

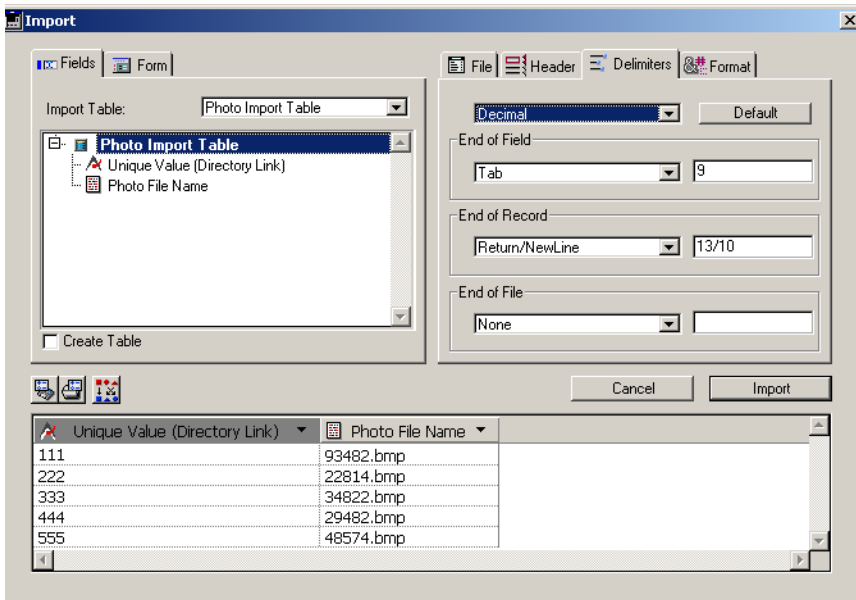
PassagePoint uses the Unique Value field in each directory record to "link" the photo to the appropriate directory record. For this reason, the Unique Value field is required in the directory records and must be in the photo import file.




To Configure the Photo Import from a client on the server machine:

1. Select Other Importing from the Configure Screen menu.
2. Select the Enable Photo Import check box.
3. Select the text import file by clicking the **Browse** button.
4. If the import file only includes the photo file names without the path, you must set the path by clicking the bottom **Browse** button and selecting the appropriate directory. If the import file includes the path, make sure the path is relative to the server and leave the path field blank.

5. Click the **Map Import File to Database** button. The Import screen will appear.
6. Click the arrow above the field columns to map the Unique Value and File Name. If there are other columns, select Not Imported as the field title. Refer to the section on *Delimiters* above for more information.



7. Once the import file is mapped, click the **Import** button. This will test the import and return you to the Configure screen.
8. To run the import immediately, click the **Run Now** button or wait until the next Directory Auto Import.

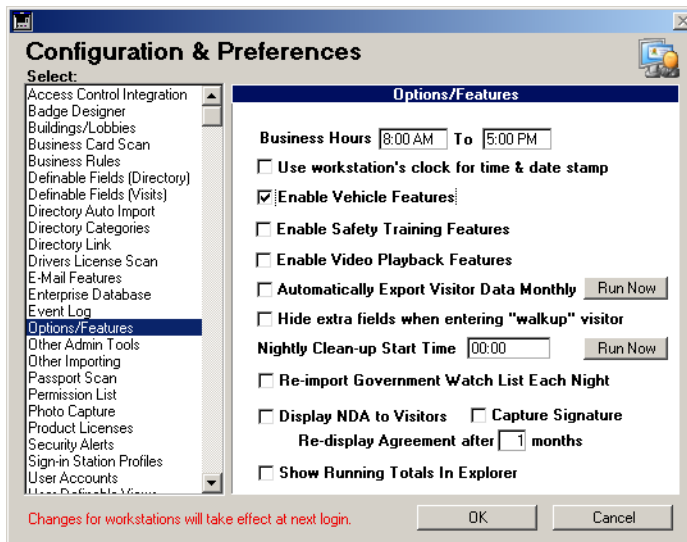
<p><b>Note</b></p> 	<p>The Directory Auto Import must be enabled for the photo import to run.</p>
--	---

To check the import, select a directory record and click on the Photo tab to view the photo for that directory record.



## Vehicle Import

PassagePoint allows you to import vehicle information to correspond with directory records. This can be done manually or automatically when the Directory Auto Import starts. In order to setup the import, you must first have the Vehicle feature enabled in the *Options/Features* section of the Configure screen.

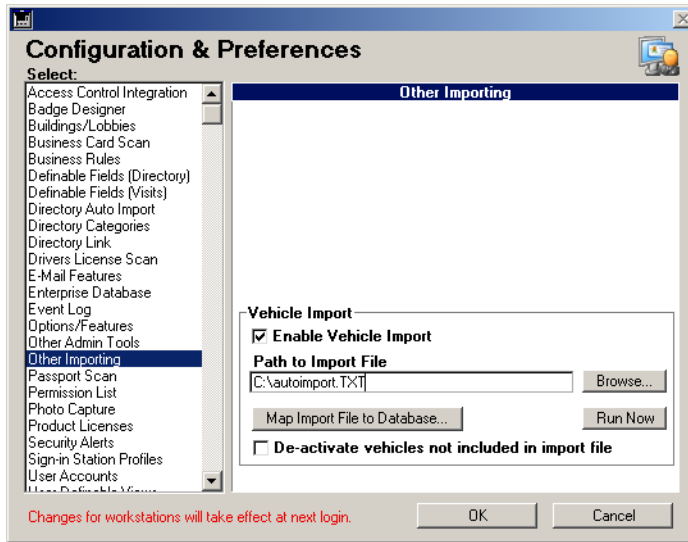


To Import vehicles, you must have the following items.

- A Unique Value (i.e. Employee ID) in each directory record.
- A text import file that includes the Unique Value (i.e. Employee ID) and the related vehicle information.

PassagePoint uses the Unique Value field in each directory record to "link" the vehicle information to the appropriate directory record.

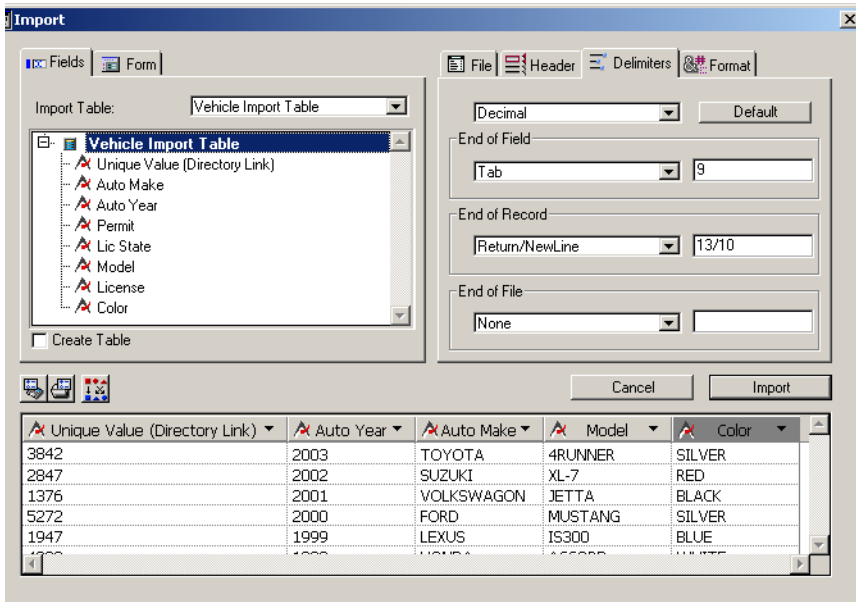
For this reason, the Unique Value field is required in the directory records and must be in the vehicle import file.




To Configure the Vehicle Import from a Client on the Server Machine:

1. Select Other Importing from the Configure Screen menu.
2. Select the Enable Vehicle Import check box.
3. Select the text import file by clicking the **Browse** button.
4. Click the **Map Import File to Database** button. The Import screen will appear.

- Click the arrow above the field columns to map the Unique Value and the vehicle information. Select Not Imported as the field title for any unwanted columns. Refer to the section on *Delimiters* above for more information.



- Once the import file is mapped, click the **Import** button. This will test the import and return you to the Configure screen.
- To run the import immediately, click the **Run Now** button or wait until the next Directory Auto Import.

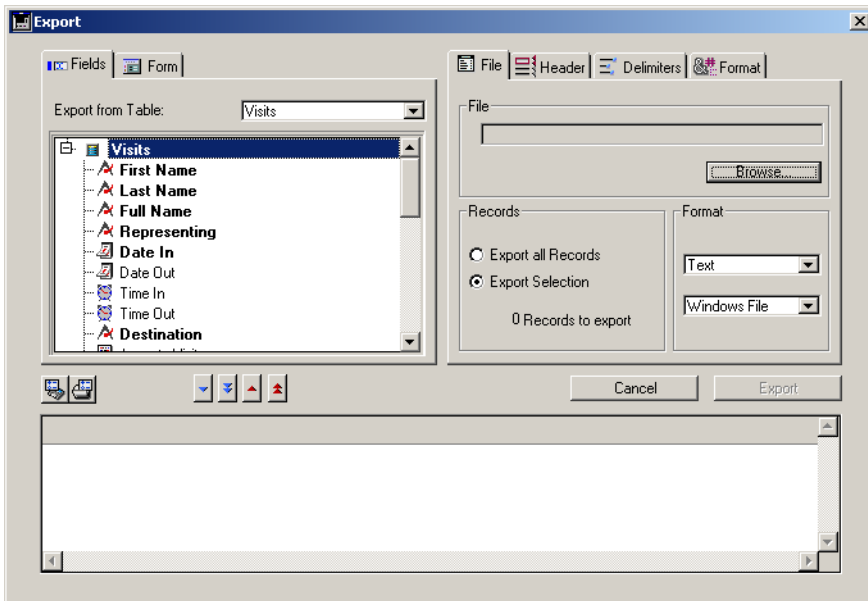
<b>Note</b> 	The Directory Auto Import must be enabled for the vehicle import to run.
--	--

To check the import, select Vehicles from the Directory menu.

## Exporting Data

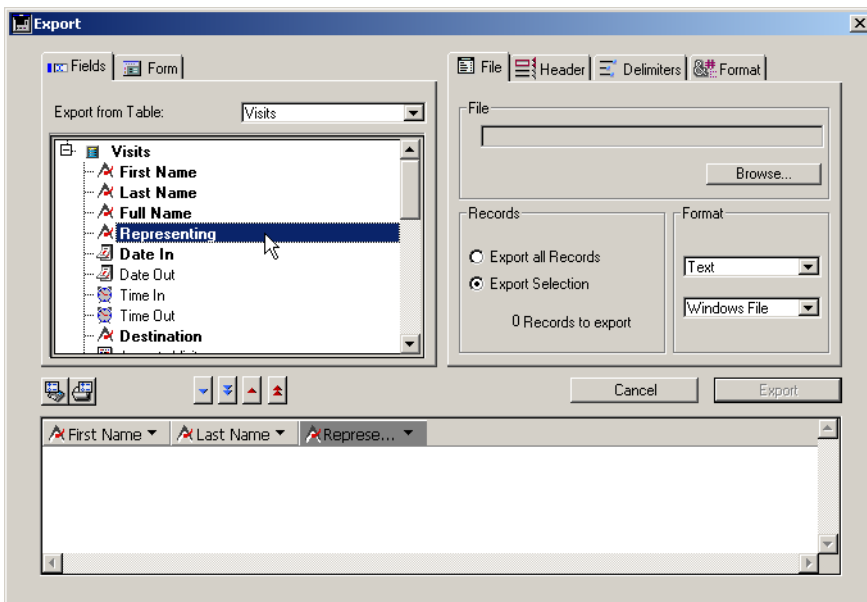
PassagePoint has export capabilities that open a wide range of possibilities. For example, you can open the exported data into a spreadsheet application or an advanced reporting tool. You can export data about visitors, people in the directory, deliveries, property and more. The export file can be saved in various formats including text, dbf, sylk, and diff. To export data, follow these steps:

1. Select the data to export. This can be done by performing a search or by using a report option.
2. Once the data is listed, select Export from the File menu. This menu option can be limited to only specific users. The Export screen will appear.



3. Select the table from which to export using the menu at the top left of the screen.

- Pick which fields to export by selecting a field from the listing and clicking on the **Single Blue Arrow** button. The field should be added to the bottom of the screen. To pick all fields, click the **Double Blue Arrow** button.
- To remove a column from the export, select the column and click the **Single Red Arrow** button. To remove all columns, click the **Double Red Arrow** button.
- Select the correct File Format. The default is Text.
- Make changes to the Header and Delimiters tabs as necessary. Refer to the *Delimiters* section for more information.
- When you are finished configuring the export, click the **Export** button. You will be asked to name the export file. Click **Save** and your data will be exported.





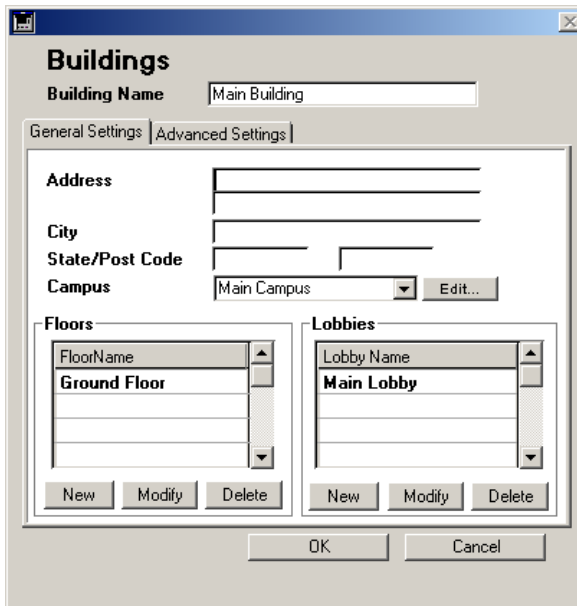


3. Don't show "Any Location" option in destination menus.
4. Select this option to remove the "Any Location" choice from the Destination menus used throughout PassagePoint and in the Web Pre-Registration.

## Buildings

By default, the Main Building is created by PassagePoint. This can be renamed by the Administrator by modifying the record. To Modify a Building Record:

1. Select the building to modify from the listing in Configuration screen.
2. Click the Modify button. The building record will be displayed.



The screenshot shows a window titled "Buildings" with a "Building Name" field containing "Main Building". Below this are tabs for "General Settings" and "Advanced Settings". The "General Settings" tab is active, showing fields for "Address", "City", "State/Post Code", and "Campus" (set to "Main Campus" with an "Edit..." button). There are two list boxes: "Floors" with "Ground Floor" selected, and "Lobbies" with "Main Lobby" selected. Each list box has "New", "Modify", and "Delete" buttons. At the bottom of the window are "OK" and "Cancel" buttons.

3. Once the changes have been made, click the **OK** button to save your changes.



## General Settings

### Building Name

The Building Name field is what gets displayed in the destination menus used throughout PassagePoint. Be as descriptive as possible. For example, you may wish to include the address of each building in the Building Name.


### Address of Building

This is optional information about each building. To Add a New Building, select File Menu > Select Configure.

1. Select Buildings/Lobbies from the drop down menu.
2. Click the **New** button.
3. Click **OK** to save changes once you have finished your entry.

To Delete a Building, select File Menu > Select Configure.

1. Select Buildings/Lobbies from the drop down menu.
2. Select the Building to delete.
3. Click the **Delete** button. Confirm that you wish to delete this building.
4. A dialog will ask if you wish to delete all of the pending visitors for this building.

<p><b>Warning</b></p> 	<p>Deleting a building will permanently delete building information and any associated Floors and Lobbies! This action cannot be undone.</p>
---	--

## Lobbies

Lobbies are within buildings. In most cases, there is one lobby in each building. If there is a back entrance or additional locations where PassagePoint is being used within a building, create additional Lobbies for those locations. The lobby in which a badge is produced is automatically "stamped" by PassagePoint. To Manage Lobbies:

1. Modify or Add a building first.
2. Use the three buttons below the Lobby listing to **Add**, **Modify** or **Delete a Lobby**.

The image shows a dialog box titled "Lobbies". It contains the following fields and controls:

- Name:** A text input field containing "Main Lobby".
- Building:** A text input field containing "Main Building".
- Terminal Printers:** A section containing:
  - New Path:** A dropdown menu with the text "- Select New Printer -".
  - Current Path:** An empty text input field.
- Buttons:** "OK" and "Cancel" buttons at the bottom.

## Lobby Name

The Lobby Name should be descriptive and include a reference to the building that it resides in. For example, a lobby inside a building named "450 Chicago" could be named "450 Chicago Front Lobby."

## Building Name

The Building name shows the site of this lobby.

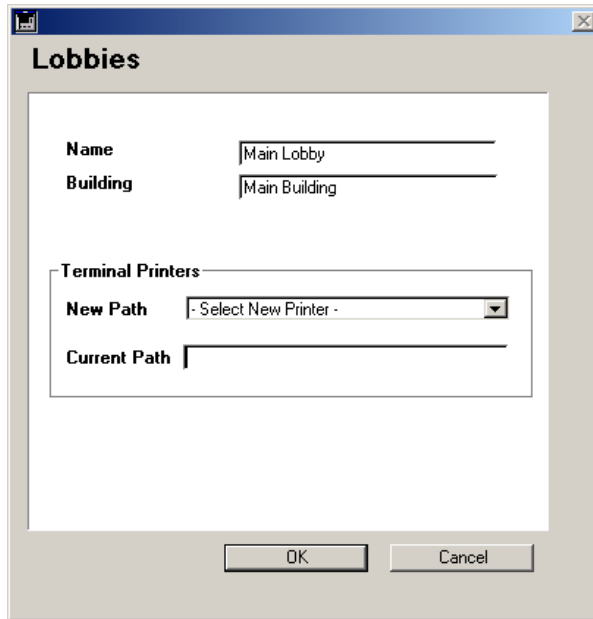
## Terminal Printers

Select the printer driver path to use for this lobby location. Select the printer from the menu. This should be done from the station that will be printing for this lobby. This is required only if using Windows Terminal Server. Please refer to the *Special Configuration* section of this manual for more information.

## Floors

Floors are within buildings. In most cases, there isn't a need to add the floors for each building. If for example, you require pre-registered visitors to be assigned to a floor, then you must enter the floors for each building.

## Managing Floors



The screenshot shows a dialog box titled "Lobbies". It contains the following fields and controls:

- Name:** A text input field containing "Main Lobby".
- Building:** A text input field containing "Main Building".
- Terminal Printers:** A section containing:
  - New Path:** A dropdown menu with the text "- Select New Printer -".
  - Current Path:** A text input field.
- Buttons:** "OK" and "Cancel" buttons at the bottom.

1. Modify or Add a building first.
2. Use the three buttons below the Floors listing on the Building screen to Add, Modify or Delete a Floor.

## Adding Multiple Floors to a Building

1. Select File Menu > Select Configure.
2. Select Buildings/Lobbies from the menu.
3. Select the building to add floors and click **Modify**.
4. Click the **New** button under the Floors listing.
5. Enter the floor name and click **OK** to save the record.

6. A new record is created, so enter the next floor name and click **OK**.
7. Once all of the floors have been added, click the **Cancel** button.

## Building Name

The Building name shows the site of the floor.

## Floor Name

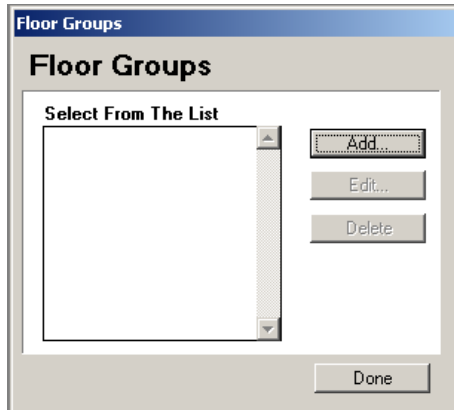
It is recommended that the floors be named a two-digit number for proper sorting. For example, floor one should be named "01" and floor two should be named "02." This will ensure that the floors are sorted in order in the listing and menus.

## Floor Group

The Floor Group menu assigns the floor to a Floor Group. This is used when setting user access levels. For example, you can give a user access to a specific group of floors only. Please refer to the *Users & Passwords* section of this manual for more information on access levels.

## Edit the Floor Group

1. Click the **Edit** button next to the Floor Group menu. The Floor Group screen will be displayed.



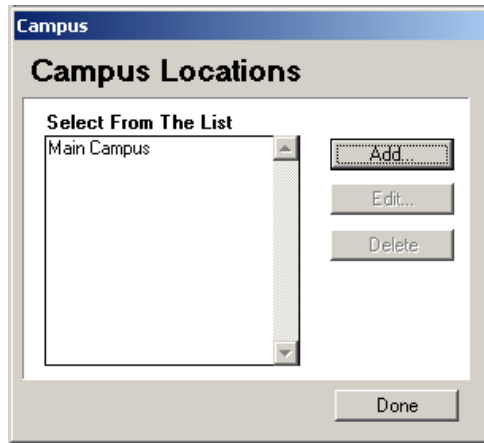
2. To Edit a Floor Group name, select it and click the **Edit** button.
3. To Delete a Floor Group, select it and click the **Delete** button.
4. To Add a Floor Group, click the **Add** button.
5. Click the **Done** button to close the Floor Group screen.

## Campus

The Campus menu assigns the building to a campus. This is used in networked editions when setting user access levels. For example, you can give a user access to a specific campus of buildings only. Please refer to the *Users & Passwords* section of this manual for more information on access levels.

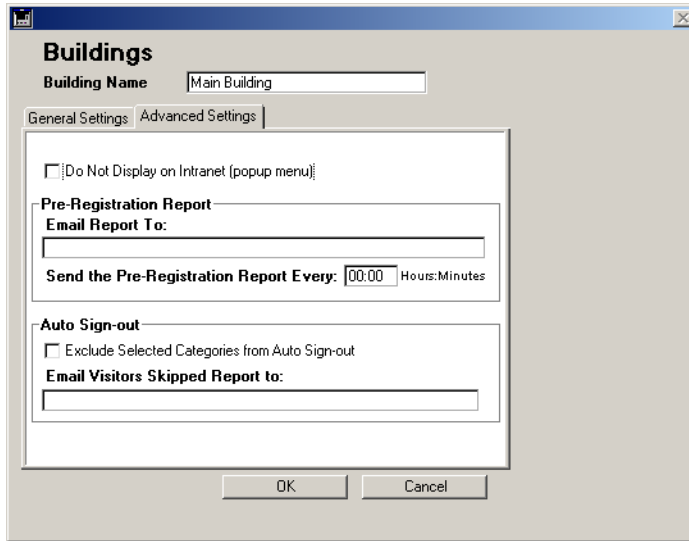
## Editing the Campus

1. Click the **Edit** button next to the Campus menu. The Campus Listing screen will be displayed.



2. To Edit a Campus name, select it and click the **Edit** button.
3. To Delete a Campus, select it and click the **Delete** button.
4. To Add a Campus, click the **Add** button.
5. Click the **Done** button to close the Campus screen.

## Advanced Settings



The screenshot shows a window titled "Buildings" with a "Main Building" text box. Below it are two tabs: "General Settings" and "Advanced Settings". The "Advanced Settings" tab is active and contains the following options:

- Do Not Display on Intranet (popup menu):
- Pre-Registration Report**
  - Email Report To:** [Text box]
  - Send the Pre-Registration Report Every:** [00:00] Hours:Minutes
- Auto Sign-out**
  - Exclude Selected Categories from Auto Sign-out
  - Email Visitors Skipped Report to:** [Text box]

At the bottom of the window are "OK" and "Cancel" buttons.

### Email Visitor Pre-registration report

Enter an Email address into this field if you wish PassagePoint to send a nightly report of visitors pre-registered for this building. Multiple Email addresses can be entered separated by a comma. For this report to be sent, the Email features must be configured properly. Please refer to the *Email Features* section of this manual for more information.

### Do Not Display on Intranet Menu Option (Web Pre-Registration Only)

Select this option if you wish to remove this building from the Web Pre-Registration's destination menu.



# 11

## Directory Categories

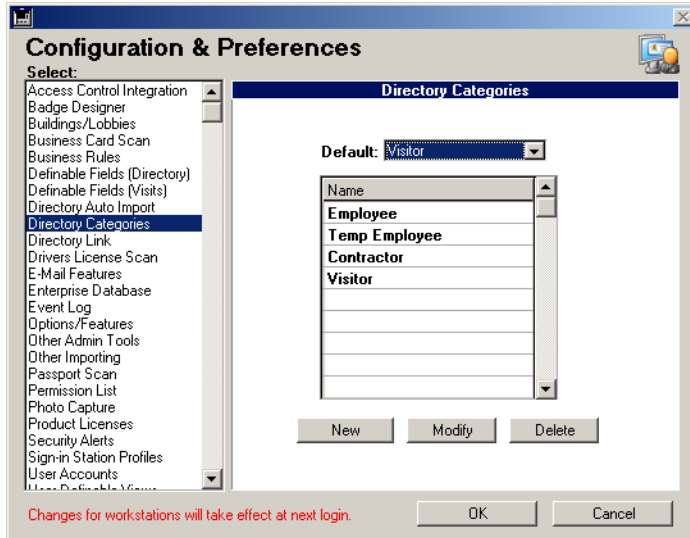
PassagePoint uses Categories to help organize individuals in the directory and for setting preferences. Each category may have its own name and its own preferences. For example, you may want to set the Employee category to have a default security level of "No Escort Required" while the Visitor category would have security level of "Escort Required." By default, the following categories are available:

- Employee
- Temp Employee
- Contractor
- Visitor

These categories can be modified or deleted and additional categories may be added.

## Managing the Directory Categories

1. Select Configure from the File menu (on Client).
2. Select Directory Categories from the menu.



### Default Category

PassagePoint uses the Default Category to automatically select the most common category. In most cases, the Visitor category is set as the default.

To Change the Default Category, select File Menu > Select Configure.

1. Select Directory Categories from the menu.
2. Use the default category menu to make a choice.
3. Click **OK** to save your changes.

To Add a New Directory Category, select File Menu > Select Configure.


1. Select Directory Categories from the menu.
2. Click on the **New** button.
3. Enter a name for the category and select the settings.
4. Click **OK** to save your entry.

To Modify a Directory Category, select File Menu > Select Configure.

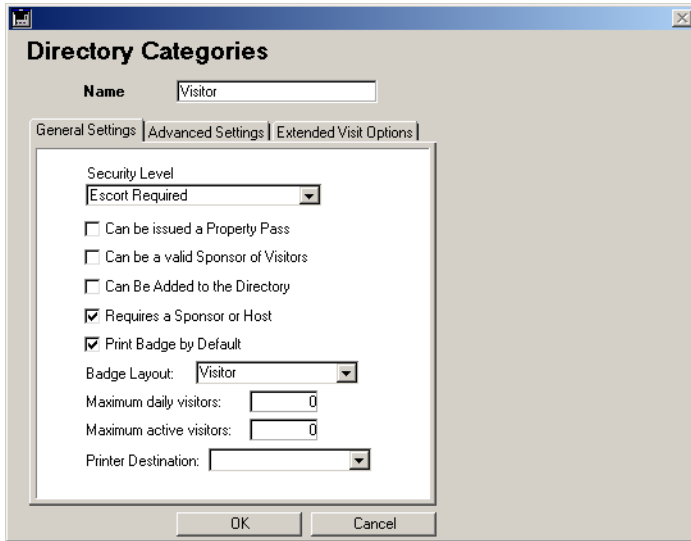
1. Select Directory Categories from the menu.
2. Select the category to modify.
3. Click the **Modify** button.
4. Make changes as needed.
5. Click **OK** to save changes.

To Delete a Directory Category, select File Menu > Select Configure.

1. Select Directory Categories from the menu.
2. Select the category to delete.
3. Click the **Delete** button.
4. Confirm that you wish to delete this category.

<b>Warning</b> 	This action cannot be undone.
---	-------------------------------

## General Settings



### Category Name

The Category Name can be any name up to 20 characters in length.

### Security Level

The security level menu sets the default security level for this category. Refer to the *User-Definable Fields* section of this manual for information on how to modify the options in the list.

### Can be Issued a Property Pass

This setting allows this category by default to checkout company property. This setting can be overwritten at the record level for each directory record.

## Can be a Valid Sponsor of Visitors

This setting allows this category by default the ability to sponsor visitors. This setting can be overwritten at the record level for each directory record.

## Can Be Added to the Directory

This setting allows you to add people to the directory under this category.

## Requires a Sponsor or Host

This setting will require that a sponsor be entered for people in this category. For this option to be enforced, the global setting Require Sponsor/Host must be selected under the Business Rules. They will be checked in and out automatically.

## Print Badge by Default

This setting makes badge printing faster and easier. If this option is selected, the visitor's badge will be printed automatically once the **Sign-in** button is clicked.

## Badge Layout

The Badge Layout menu is used to assign a badge file to the category. This allows you to have a different badge layout for each category. To ensure that all workstations get the badge designs, use the Global Badges feature discussed earlier in this manual. In most cases, all of the categories will use the default badge file named "visitor.4lb." If the Badge Layout menu is left blank, the default will be used.

## Maximum Daily Visitors

This setting limits the number of visitors a host with this category can have in one day. A warning message will be displayed to the receptionist if the limit is exceeded.

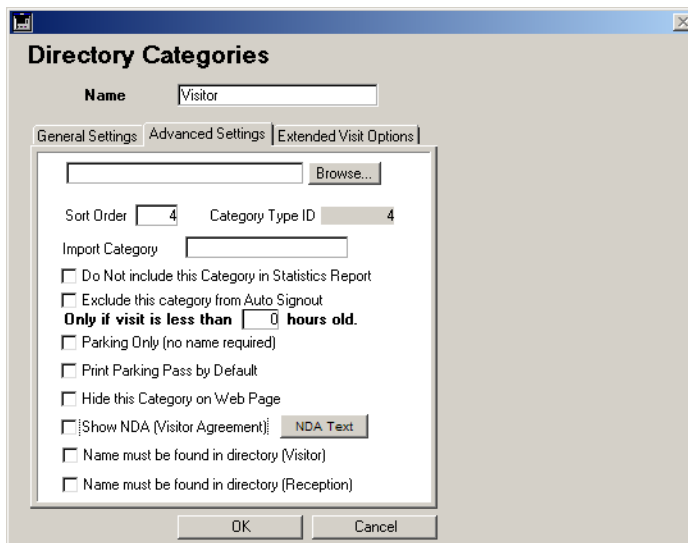
## Maximum Active Visitors

This setting limits the number of visitors a host with this category can have at one time. A warning message will be displayed to the receptionist if the limit is exceeded.

## Printer Destination

By default, PassagePoint will print badges to the Primary printer selected in the Station Preferences. If you use two printers, each with different badge material, use the Printer Destination menu to select which printer to use for this category.

## Advanced Settings



The screenshot shows a dialog box titled "Directory Categories" with a tabbed interface. The "Advanced Settings" tab is selected. The "Name" field contains "Visitor". Below the tabs, there is a "Browse..." button next to an empty text field. The "Sort Order" is set to 4 and the "Category Type ID" is set to 4. The "Import Category" field is empty. There are several checkboxes: "Do Not include this Category in Statistics Report", "Exclude this category from Auto Signout", "Parking Only (no name required)", "Print Parking Pass by Default", "Hide this Category on Web Page", "Name must be found in directory (Visitor)", and "Name must be found in directory (Reception)". The "Show NDA (Visitor Agreement)" checkbox is checked, and a button labeled "NDA Text" is visible next to it. The "Only if visit is less than" field is set to 0 hours old. At the bottom, there are "OK" and "Cancel" buttons.

## **Import Category**

This field holds the name of the associated category field in the import file. PassagePoint uses the value found in this field to map to the correct category. This is only used when the import file contains a variety of categories.

For example, assume each row of the import file specifies in a field the category for that record. You can then use the data in that field to associate each record with the appropriate category. If EMP represents the Employee category, enter "EMP" in the Import Category field and everyone with "EMP" in their import record will be automatically associated as an Employee.

## **Sort Order**

This is the sort order used when the category list is displayed in menus.

## **Exclude this category from Auto Sign-out**

This option prevents PassagePoint from automatically signing out visits from this category visiting specific locations. You must activate this option in each building record. A separate option allows you to qualify the visits as being a specified number of hours or more. If the visit is less than the specified number of hours, it will not be signed out. If the visit has been there longer, it will be signed out.

## **Parking Only**

This option allows you to make visit entries without entering in the visitor's name or company. This is generally used in Parking Garages where visitor information is not required. This option will only be displayed if the Vehicle Features are turned on under Options/Features in the Configure screen.

### **Print Parking Pass by Default**

Select this option to automatically print a parking pass in the Gate/Garage Entry screen when the record is saved. This option will only be displayed if the Vehicle Features are turned on under Options/Features.

### **Hide this Category on Web Page**

Select this option to remove the category from the menu displayed on the Web Pre-Registration.

### **Show NDA (Visitor Agreement)**

This option is used to display a Non-Disclosure Agreement (or Visitor Agreement) to the visitor when they Sign-in. The Agreement is shown on the visitor sign-in screen.

### **NDA Text**

Each category can have separate NDA text. Click the **NDA Text** button to Paste or Load the Text for this Category.

### **Name must be found in Directory (Visitor)**

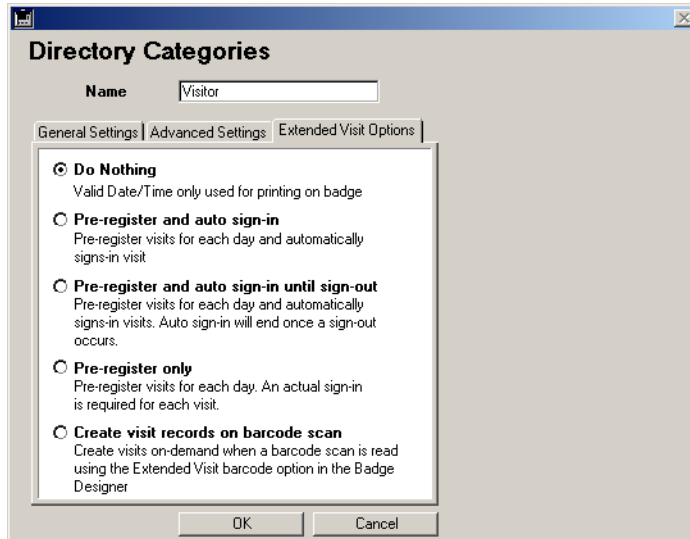
This option requires that if this category is selected, the name entered must be found in the PassagePoint Directory. If not, the visitor must select another category. This option is commonly used for the Employee category.

### **Name must be found in Directory (Reception)**

This option requires that if this category is selected, the name entered must be found in the Passage Point Directory. If not, the receptionist must select another category. This option is commonly used for the Employee Category.



## Extended Visit Options



### Do Nothing

Prints the date and time of the visit on the badge.

### Preregister and auto sign-in

Preregisters visits for each day after the visitor signs in. For example, if a visit is registered for one week, and the visitor does not sign in on day one, the system asks for a sign-in on day two. If the visitor signs in on day one, the system automatically signs in the visitor on day two, not requiring additional input from the visitor.

### Preregistor and auto sign-in until sign-out

Preregisters visits for each day after the visitor signs in and expects the visitor to sign out on the final day only. It is not required to sign out every day.

## **Preregister only**

Requires the visitor sign in and sign out on a daily basis.

## **Create visit records on barcode scan**

After a visitor has been registered, a barcode scan is created. Upon subsequent visits, the barcode is scanned rather than requiring the visitor to sign in.

# 12

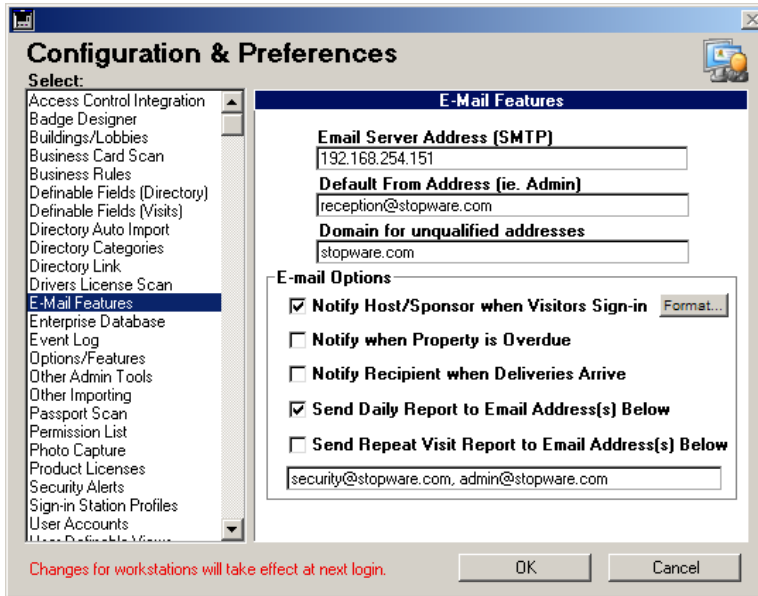
## Email Features

PassagePoint uses Email to deliver many useful messages and reports. Some of the automatic Email features available include:

- Visitor Announcements
- Property Pass Management/Overdue Notices
- Delivery Notification
- Daily Activity Reports
- Import Performance Reports

To Manage Email Features:

1. Select Configure from the File menu (on Client).
2. Select Email Features from the menu.



## Configuring the Email Feature

In order for the Email features to work properly, the Email server and default Email address must be entered.

### Email Server Address

Enter the domain name or IP address for the SMTP mail server. Passage-Point works like any standard Email client by sending the Email to the SMTP server for delivery.

## Default From Address

This is a default Email address set for sending reports. It is recommended that a valid administrative Email address be entered here. The default reply address will also be used when sending a visitor announcement if the user account's Email address field is left blank. Refer to the *Users & Passwords* section of this manual for more information.

## Domain for Unqualified Addresses

The Domain field is used to append all addresses in the Directory and otherwise with a specific domain address. For example, if the directory only contains Email user names without the "@mydomain.com," then enter "@mydomain.com" into the Domain field and PassagePoint will automatically append each address when mail is sent.

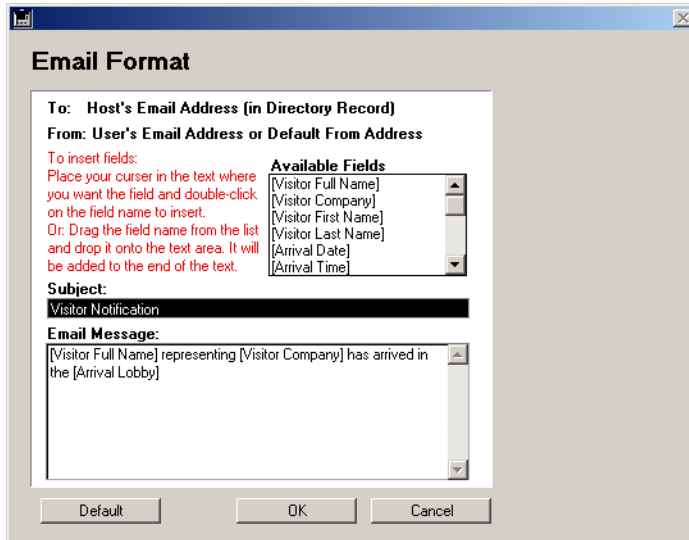
## Email Options

### Notify Host/Sponsor when Visitors Sign-In

This option turns on/off the ability to Email the visitor announcement to hosts.

### Format Button

The email from receptionist to host can be formatted to include additional information. It works like a "mail merge" program. Create an email and insert the fields by double-clicking.



## Notify when Property is Overdue

This option turns on/off the automatic notice to employees who have overdue property.

## Notify Recipient when Deliveries Arrive

This option turns on/off the automatic notice to recipients when new deliveries arrive.

## **Send Daily Activity Report**

Enter the Email address(s), separated with a comma, to receive the daily activity report. This report give totals for the day and provides other important information about the day's activities. This report is also stored in the Events Log.

## **Send Repeat Visit Report**

This option will automatically send a Repeat Visit Report to the Email addresses entered. This report shows anyone who has visited at least 3 times during the past three calendar days and past three business days.





# 13

## User-Definable Fields & Lists

PassagePoint has user-definable fields and lists that can be customized by the administrator.

### Visitor and Directory Custom Fields

Custom Fields are available for recording information that isn't already displayed on PassagePoint screens. There are seven (7) custom fields for Visitor records and six (6) custom fields for Directory records.

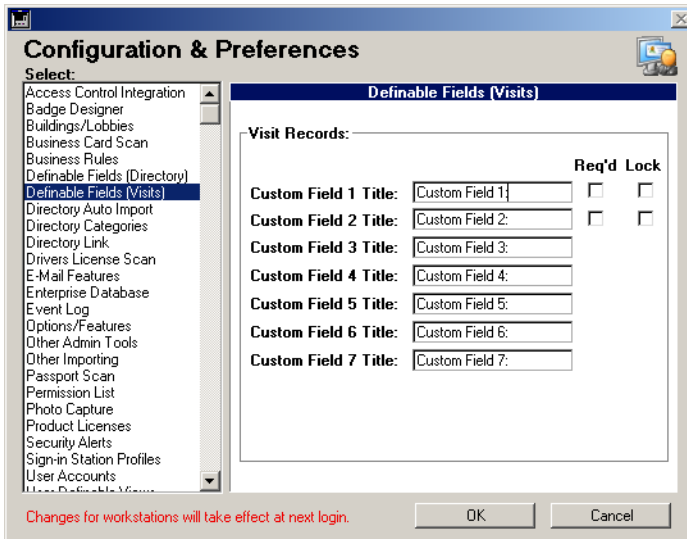
Some visitor custom fields are also used for special features such as:

- Custom Field 1 is displayed in the Web Pre-Registration
- Custom Fields 1 and 2 are enterable drop-down menus that can be pre-populated with common selections

## Custom Fields (Visits)

To Manage Custom Fields (Visits), select File Menu > Select Configure.

1. Select Definable Fields (Visits) from the menu.
2. Edit the Custom Field labels. For example, "Custom Field 1" can be changed to "Meeting Room."
3. Custom Fields 1-2 can be made required fields. Click the "Req'd" box next to the field to make it required.
4. Custom Fields 1-2 can be "locked" so that the user must pick from a pre-defined list. The list can be managed by selecting File > Edit Lists. Locking the field also allows the user to use the "type ahead" feature that automatically selects the closest match.



5. Click **OK** to save changes.

- To view the changed field labels, open a visitor entry screen or the Directory screen for directory custom fields.

PassagePoint: Rapid Registration with Visit Search Engine

Search Engine Visit Entry

Visitor Information

Category: Visitor

First & Last Name: [ ] [ ]

Representing: [ ]

Purpose: [ ]

Instructions... Add...

Visitor Information, continued

Citizenship: [ ] Details...

Time In/Out: 00:00 00:00

Sponsor/Host Information

Name or Number: [ ] Lookup

Information: [ ]

Send E-mail [ ] Details... Notes...

Access Control and Destination

Access Card Number: [ ]

Meeting Room: [ ]

Custom Field 2: [ ]

Security Level: Escort Required

Building/Floor: Main Building [ ]

Print Badge Qty: 1 [ ]

Authorized By: [ ]

Contact

Primary [ ]

Secondary [ ]

Other

Custom Field 3: [ ]

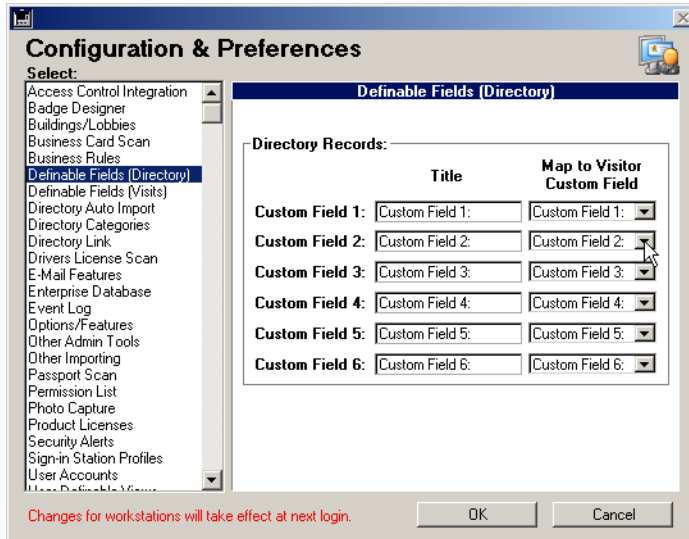
Custom Field 4: [ ]

Custom Field 5: [ ]

Custom Field 6: [ ]

Custom Field 7: [ ]

Add Another Sign-In



## Custom Fields (Directory)

To Manage Custom Fields (Directory), select File Menu > Select Configure.

1. Select Definable Fields (Directory) from the menu.
2. Edit the Custom Field labels. For example, "Custom Field 1" can be changed to "Cell Number."
3. Click **OK** to save changes.
4. To view the changed field labels, open the Directory screen


## Map to Visitor Custom Field

To the right of each **Custom Field** label is a drop-down menu containing the list of definable fields for the visit table. Select one of these fields to create a link between the **Directory Custom Field** and **Visitor Custom Field**.

## Editing Lists

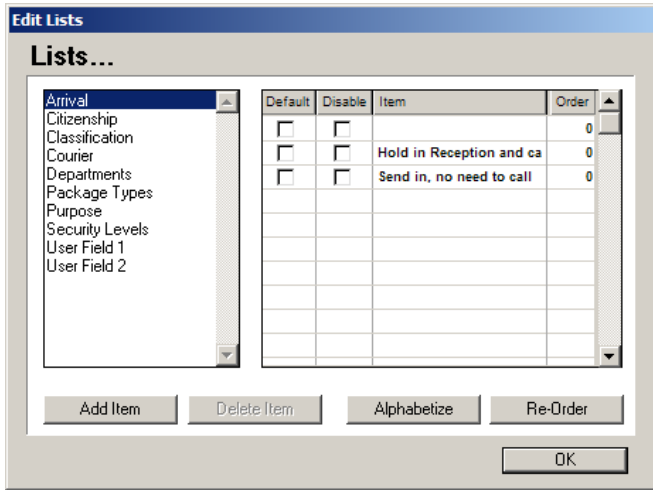
PassagePoint uses lists to provide easy-to-use menus. These lists can be modified to include your own custom menu options. The lists include:

- Arrival Instructions
- Courier
- Departments
- Package Types
- Purpose of Visit
- Security Level
- Citizenship
- Classification
- User Field 1
- User Field 2

<b>Note</b> 	Some lists such as Destination and Category can be edited in the Configure screen.
--	--

## Managing Lists

To Manage Lists, select File Menu > Select Edit Lists.



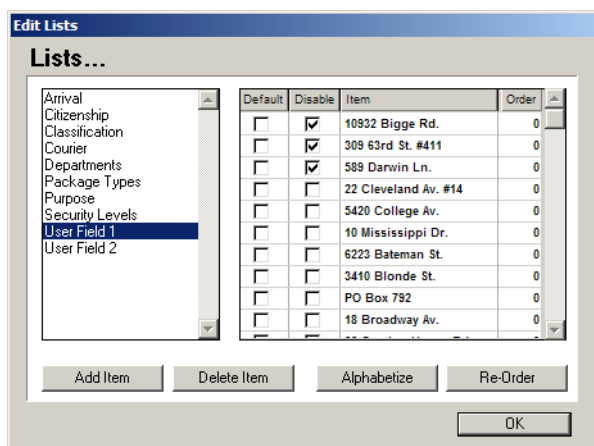
### To Sort a List

The order of the list can be set manually by entering a number in the order field for each item and then click the Re-order button. You can automatically sort the list in alphabetical ascending order by clicking the Alphabetize button.



## To Disable (Hide) a List Item

1. Select the item you wish to edit.
2. Click the box next to the item on the list under the Disable Column.
3. Click **OK** to save changes.





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## Scanner Hardware Setup

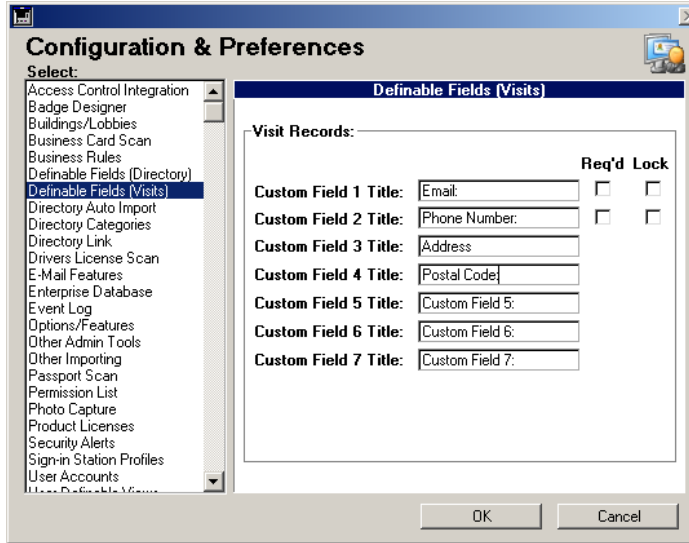
### Business Card Scanner

PassagePoint can capture data using the Corex Card Scan device. By default, the first name, last name and company are captured. Additional data can also be captured.

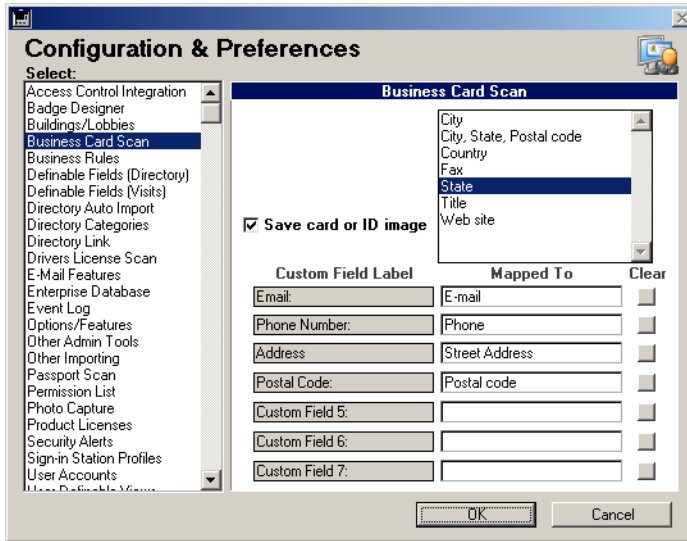
### To Capture Additional Card Scan Data

1. Card Scan data can be captured into the visitor custom fields.
2. Select *User Definable Fields* from the Configure screen to edit the custom fields you wish to use.


3. The example below shows three custom fields changed.



4. Select Card Scan Data Map from the menu.
5. To map the Card Scan data to the custom fields, "drag" the field you wish to capture from the listing and "drop" it into the field next to the correct custom field label.



6. Click the **Clear** button next to any field to remove the mapping.
7. Click **OK** to save changes.

<p><b>Note</b></p> 	<p>The Card Scan device must be selected in the Station Preferences in order to work with PassagePoint.</p>
--	---

## To Save the Image of the Card

This option turns on the image acquisition feature so that the business card image is stored in the visit record along with the data that is extracted off the card. This feature requires that Quicktime be installed on the client computers since it uses special Quicktime compression. The Quicktime installer is available on the PassagePoint CD and can be downloaded for free from [quicktime.apple.com](http://quicktime.apple.com).

**Note**

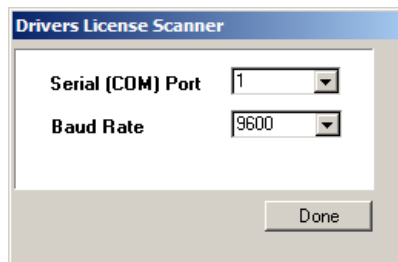
Even with file compression, this feature will cause the data file to grow at a much faster rate than with just the data alone. Card scans range in size from 50K in size.

## Driver License Scanners

PassagePoint supports various driver license scanners. Primarily there are two types of driver license scanners, serial and OCR (optical character recognition). Serial based scanners that connect via the serial port and read the magnetic strip or 2D barcode of a license and send the data to PassagePoint. The OCR scanners take a picture of the ID, scan the text, and then transmits the data and image to PassagePoint.

To Setup a Serial Based Driver License Scanner, select File > Configure.

1. Select the Driver License Scanner Setup




2. Select the correct scanner from the drop-down list.

3. Drag and Drop the fields you wish to capture into the custom fields below. By default, the First and Last names are always captured. You can rename the custom fields to match the data being captured. Click the **Clear** button next to each field if you wish to change a field assignment.
4. Click **Done** to save changes.
5. Refer to Workstation *Preferences* section in this manual for more information on setting up the scanner and setting the port and baud rate within PassagePoint.

To Setup a OCR Based Driver License Scanner, select File > Configure.

1. Select the Driver License Scanner Setup
2. Select the correct scanner from the drop-down list.
3. Drag and Drop the fields you wish to capture into the custom fields below. By default, the First and Last names are always captured. You can rename the custom fields to match the data being captured. Click the **Clear** button next to each field if you wish to change a field assignment.
4. The "Extract License Image" option will activate the acquisition feature that stores the picture of the ID. This feature requires that Quicktime be installed on the client computers since it uses special Quicktime compression. The Quicktime installer is available on the PassagePoint CD and can be downloaded for free from [quicktime.apple.com](http://quicktime.apple.com).

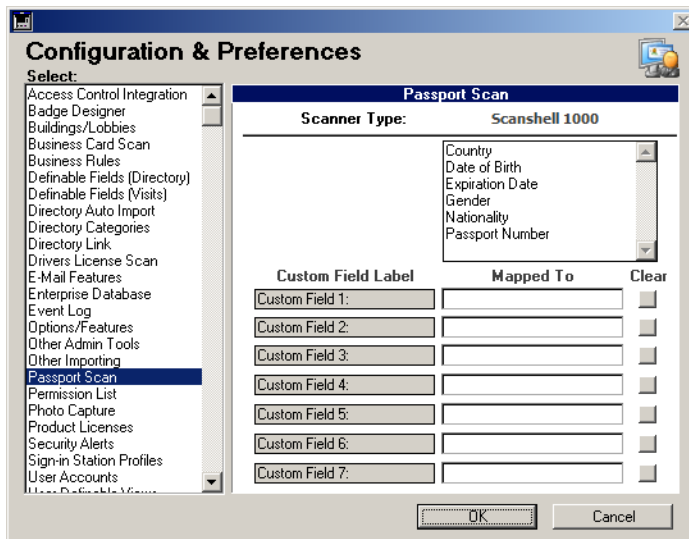
<p>Note</p> 	<p>Even with file compression, this feature will cause the data file to grow at a much faster rate than with just the data alone.</p>
---	---

5. The “Extract Face Image” option will activate the acquisition feature that stores the cropped image of the face. This feature requires a Photo Capture license and requires that Quicktime be installed on the client computers since it uses special Quicktime compression. The Quicktime installer is available on the PassagePoint CD and can be downloaded for free from [quicktime.apple.com](http://quicktime.apple.com).
6. Click **Done** to save changes.
7. Refer to Workstation Preferences section in this manual for more information on setting up and calibrating the scanner.
8. OCR scanners require additional drivers and software. The PassagePoint CD installer will include these for your convenience.

# Passport Scanner

To Manage Business Rules. select File > Configure > Passport Scan Setup.

1. Drag and drop the data to capture from the Passport list into the fields.
2. Set the Driver license scan setup type to "ID scan".







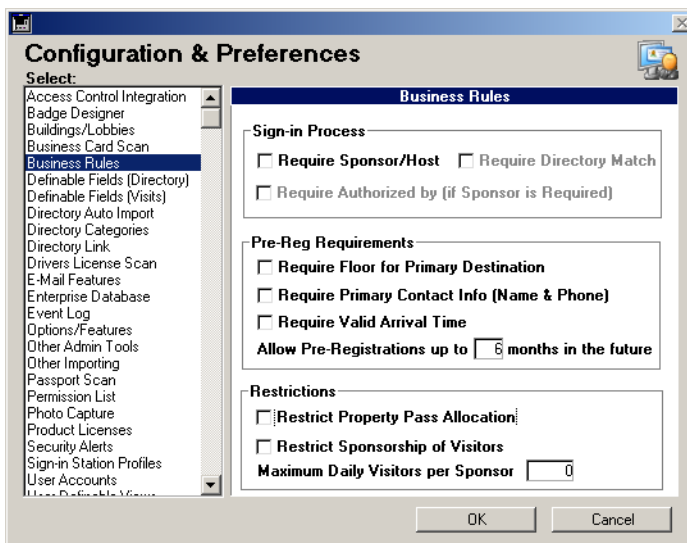
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## Business Rules

Each organization has its own set of business policies and procedures. For example, some companies require that every visitor be escorted by an employee (host). These "Business Rules" can be configured in Passage-Point.

To Manage Business Rules, select File > Configure (from the Client).

1. Select Business Rules from the menu.
2. The Business Rules screen will be displayed.



## Sign-in Process

### Require Sponsor/Host

Select this option to require that the Sponsor/Host field be entered (for the directory categories that require a host). Please refer to the *Directory Categories* section of this manual for more information.

### Require Directory Match

Select this option to require that the Sponsor/Host entered be a valid sponsor found in the PassagePoint directory. Valid sponsors are those people who have the "Sponsorship of Visitors" permission box selected in their directory records and are marked as "Active".

### Require Authorized by (if Sponsor is Required)

Select this option to require that the Authorized By field be entered prior to sign-in.

## Pre-Registration Requirements

### Require Floor for Primary Destination

Select this option to require that a floor be selected (along with a building) when the visitor is pre-registered and signed-in.

### Require Primary Contact Info (Name & Phone)

Select this option to require that the Primary Contact info be entered during pre-registration.

## Require Valid Arrival Time

Select this option to require that a valid arrival time be entered during pre-registration. The time is checked against the server's clock.

## Restrictions

### Restrict Property Pass Allocation

Select this option to restrict property pass allocation to the directory records that have the "Property Pass Permission" set.

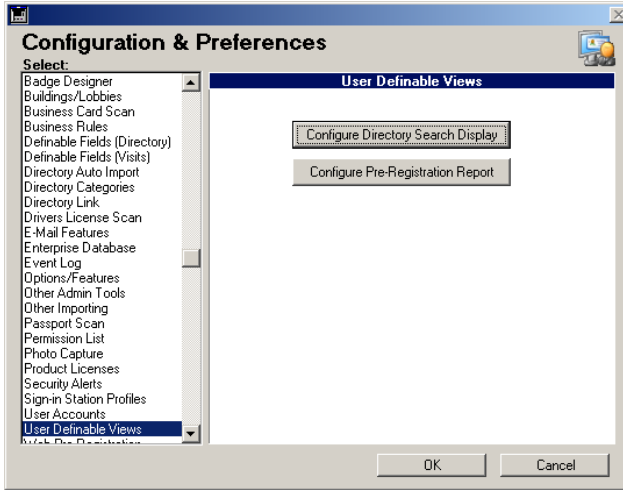
### Restrict Sponsorship of Visitors

Select this option to restrict sponsorship to those directory records that have visitor sponsorship permission. For example, a sponsor in the directory that does not have "Sponsorship Permissions" would not be considered a valid sponsor.

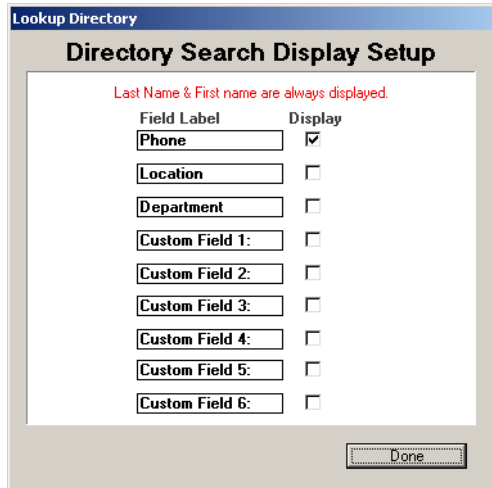
### Maximum Daily Visitors per Sponsor

By default, no maximum is set. If you do want to limit the number of visitors each sponsor can have per day, enter the maximum number. This feature can also be set on category basis. Please refer to the *Directory Category* section of this manual for more information.

## User Definable Views



## Directory Search Display Setup



The Directory Search Display Setup allows you to control which fields are shown on the Directory Lookup screen. By default, the first name, last name, and phone are displayed.

To select other fields, click the box next to the field names.

## Pre-Registration Report



Field Label	Display
Name	<input checked="" type="checkbox"/>
Company	<input checked="" type="checkbox"/>
Date	<input checked="" type="checkbox"/>
Time	<input checked="" type="checkbox"/>
Sponsor/Host	<input checked="" type="checkbox"/>
Destination	<input checked="" type="checkbox"/>

Done

The pre-registration Report is an email based report that gets sent on a regular schedule. The setup screen allows you to decide which information is included on the report.

To select the report fields, click the box next to the field names.



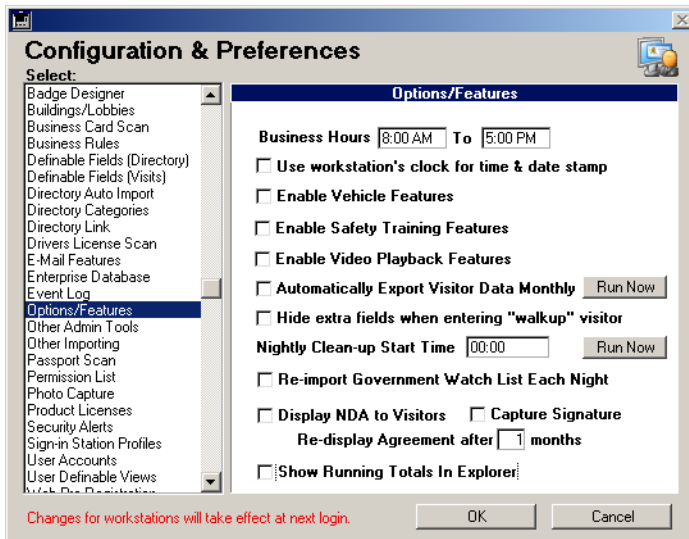
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## Options & Other Features

PassagePoint uses many settings to turn on and off features and configure specific functionality. This way, users only use and see the features that should be used. Many of these settings can be found in the Configure Screen under Options/Features.

To Manage Options/Features, select File > Configure (on the Client).

1. Select Options/Features from the menu.



## Times & Dates

Use workstation's clock for time & date stamp.


By default, all time and date stamping is done by using the clock on the server. This provides a consistent clock source to avoid inconsistencies among workstations. In some situations, however, it is best to use the clock of the local workstation instead of the server. For example, if the server is located in New York and workstations are located in San Francisco and Chicago. This setting is system wide and will make this change for all workstations.

## Business Hours

These fields hold the hours of operation for your company. This setting is used by companies that require employees to sign-out if they leave after the lock-down time. If an employee needs to sign-out after the lock-down time, PassagePoint will allow them to do so without requiring them to sign-in first.

## Nightly Cleanup Start Time

This time field is used to schedule the automatic clean-up process. This process automatically signs-out visitors that forgot to sign-out, checks for overdue property, Emails daily traffic reports and other tasks too. By default, the start time is midnight. This can be changed to whenever you wish. It is recommended that the time be between midnight and 5 a.m. or during light use of the system. Please refer to the *Administrative Tasks* section of this manual for more information on the Clean-up Process.

<p>Note</p> 	<p>Try to avoid scheduling the clean-up process at the same time as the Directory Auto Import process to minimize import time.</p>
---	--

To start the Clean-up process immediately, click the **Run Now** button.



## Special Features

### Enabling Vehicle Features

This option turns on various vehicle related features. These features include:

- Importing of vehicles linked to directory records
- Garage/Gate Entry Pre-Registration Screen
- Searching for Host using vehicle information

### Enabling Safety Training Features

This option configures PassagePoint to use Custom Field 2 for recording safety training information. Please refer to the *User Definable Fields* section of this manual for more information.

### Enabling Video Features

This option allows PassagePoint to play a short video on the Visitor Sign-in station during the sign-in process. This feature is used to play safety information or as a marketing tool. The Video Playback feature requires an additional license from STOPware.

## Other Options

### Hiding "extra" fields during new entry

This option temporarily hides many of the fields not commonly used when the **New** button is clicked on the Explorer screen. These fields include:

- Primary Contact
- Secondary Contact
- Custom Fields 5-7
- Time In & Out

## Automatically Export visitor data monthly

This option will export visitor data to a tab delimited text file on the first day of each month. The text file is saved in the server's application folder. This can be used as an archive of visitor data.

## Display NDA

This option turns on the NDA features of PassagePoint. Please refer to the *NDA Configuration* section of this manual for more information on this feature.

## Capture Signatures

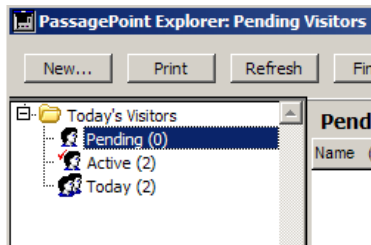
This option allows signatures to be captured with the NDA feature as well as the Property Pass and Delivery features. Please refer to the *NDA Configuration* section of this manual for more information on this feature.

## Re-display Agreement after...

This option allows signatures on file to be valid for a certain time frame. Enter the number of months for the NDA signature to be valid. If the visitor has already signed the NDA within the allowed time frame, PassagePoint will not prompt for a new signature. Please refer to the *NDA Configuration* section of this manual for more information on this feature.

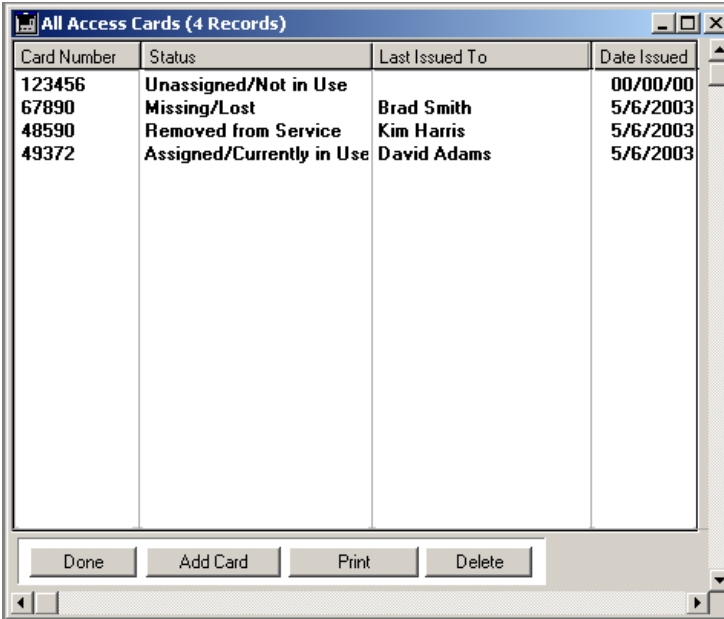
## Running Totals

Click this option to show the number of Pending, Active and Today's visitors in the Explorer screen.



## Managing Access Cards

Many companies and organizations use access cards to limit access into specific areas of the building. When employees lose or forget their access cards, they typically get a loaner from the receptionist or security desk. PassagePoint can record which access card was issued so that it can be recovered if not returned. As access cards are distributed, a separate access card listing is updated and maintained automatically. It records the access card number, history of transactions and status. If you wish to add, delete, or modify access card records, use the Access Card option under the File menu.



Card Number	Status	Last Issued To	Date Issued
123456	Unassigned/Not in Use		00/00/00
67890	Missing/Lost	Brad Smith	5/6/2003
48590	Removed from Service	Kim Harris	5/6/2003
49372	Assigned/Currently in Use	David Adams	5/6/2003

Done Add Card Print Delete



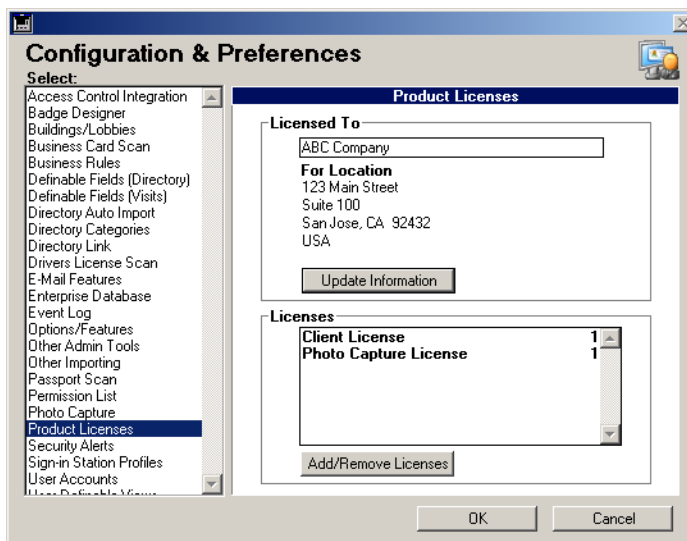
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## License & Serial Number

PassagePoint is a licensed product that uses serial numbers to activate workstation licenses and other features such as Photo Capture and Access Control Integration. The first time PassagePoint is launched (on the Client), the Setup Wizard will prompt you to enter the serial number information. Once the PassagePoint has been serialized, the serial number information can be managed in the Configure Screen.

To Manage the Serial Number, select File > Configure.

1. Select Licenses from the listing.



## Licensed To

This displays the company or organization that PassagePoint is licensed to. This is a required field.

## For Location

This is the location for which PassagePoint is licensed. The zip/postal code is a required field.

## Licenses

This displays the number of licenses available.

## Company Information

To Manage Company Information, select File > Configure (on the Client).

1. Select License from the menu.
2. Click on the **Update Information** button. The edit screen will appear.

Company Information			
Business Name	ABC Company		
Address	123 Main Street		
Address2	Suite 100		
City	San Jose	CA	92432
PostCode			
Country	USA		
Phone	444-555-666	Fax	222-333-7777
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

3. Make changes to the company information.
4. Click **Save** to save your changes.

## Serial Numbers

PassagePoint is serialized the first time it is launched. In server-based installs, the serialization information is stored on the server so that you do not have to serialize each client installation separately.

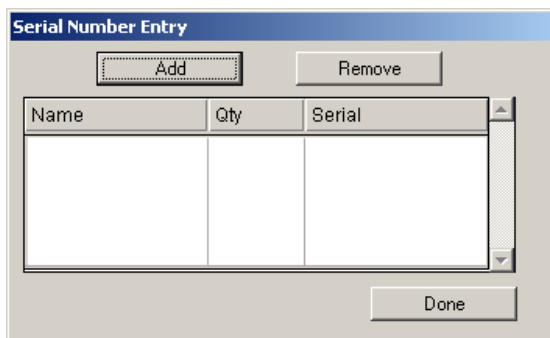
### Entering the Serial Number the First Time

The first time PassagePoint is launched (on the Client), the Setup Wizard will walk you through the serialization process.

## Adding Additional Licenses

To Update the Serial Number with the New Licenses, select File > Configure (on the Client).

1. Select License from the menu.
2. Click on the **Add/Remove** button.



3. Follow the on-screen instructions.



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## Special Configurations

PassagePoint has many special features that require additional configuration. This chapter will explain these features in more detail so that installation and configuration goes smoothly.


### Photo Capture

The Photo Capture feature requires the following items:

- Installation of Camera Hardware
- Installation of Required Software
- Enabling the photo capture system setting
- Additional Photo Capture License
- Configuring the Workstation Settings
- Enabling the feature in user accounts

### Hardware Requirements

Various cameras will work with PassagePoint including: Logitech Quickcam, and ValCam Professional Camera.

<p><b>Note</b></p> 	<p>Not all manufacturers of cameras conform to the TWAIN standard, causing incompatibilities with PassagePoint. Make sure that the camera you purchase includes a compatible TWAIN driver.</p>
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## Software Requirements

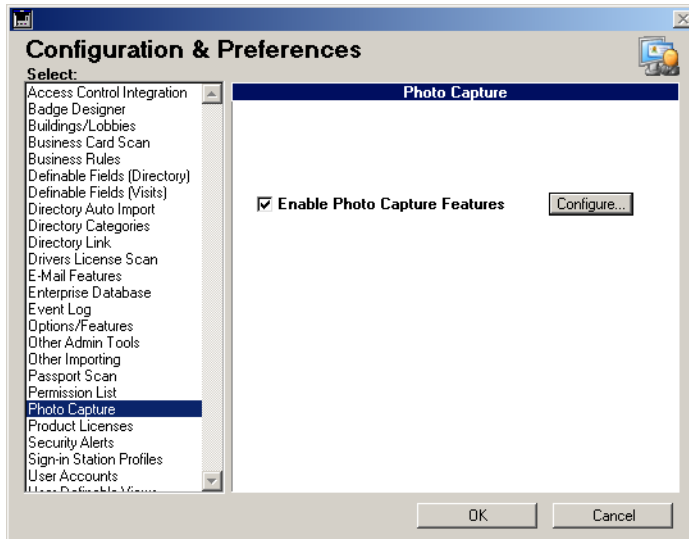
- Compatible TWAIN driver for the camera.
- Installation of QuickTime 4.0 or higher (Select Full or recommended Install, not Typical or minimum). Get this free at [quicktime.apple.com](http://quicktime.apple.com).

## Photo Capture System Setting

In order to use the Photo Capture feature, it must first be enabled in the Configure screen. By default, this feature is not enabled.

To Enable the Photo Capture Feature, select File > Configure (on the Client).

1. Select Photo Capture from the menu.
2. Select the Enable Photo Capture Features check box.
3. Click **OK** to save changes.



To Set a Maximum Width and Height of the Photo, select File > Configure (on the Client).

1. Select Photo Capture from the menu.
2. Click to configure button.



3. Enter a maximum width (in Pixels) into the Max W field. This value can be between 0-159 (up to 1.73 inches wide). 75 is a recommended size.
4. Enter a maximum height (in Pixels) into the Max H field. This value can be between 0-120 (up to 1.31 inches tall). 75 is a recommended size.
5. Click **OK** to save changes.

## Photo Capture Licenses

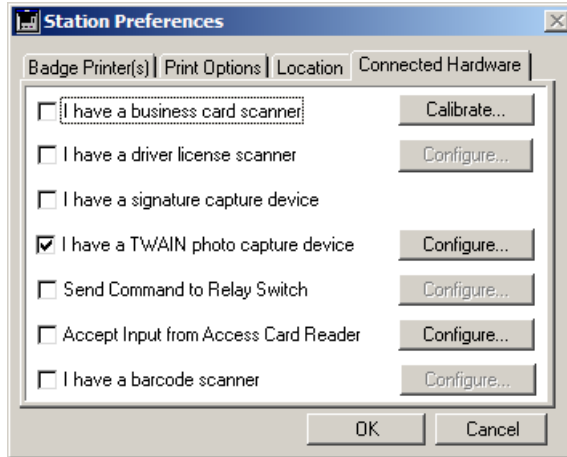
An additional license is required for each workstation that uses the photo capture feature. This license can be purchased from your PassagePoint representative. Please refer to the *Licenses & Serial Numbers* section of this manual for information on how to install licenses.

## Workstation Settings

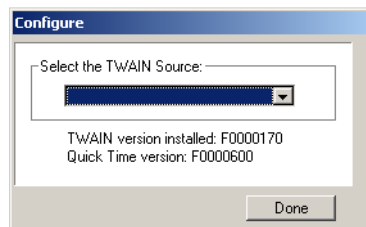
Each workstation must be configured to work with the installed camera.

To Configure the Workstation, select File > Station Preferences (on each workstation Client).

1. Click the Connected Hardware tab.




2. Select the "I have a TWAIN photo capture device" check box.
3. Click the **Configure** button next to the check box.



4. From the menu, select the TWAIN driver source to use on this workstation.

5. Click Done when finished. Then click OK to save changes.

<p>Note</p> 	<p>The TWAIN and QuickTime information is displayed to confirm proper installation. If they show "N/A" as the version, try installing them again. If the menu does not contain any options, make sure the photo capture licenses have been installed.</p>
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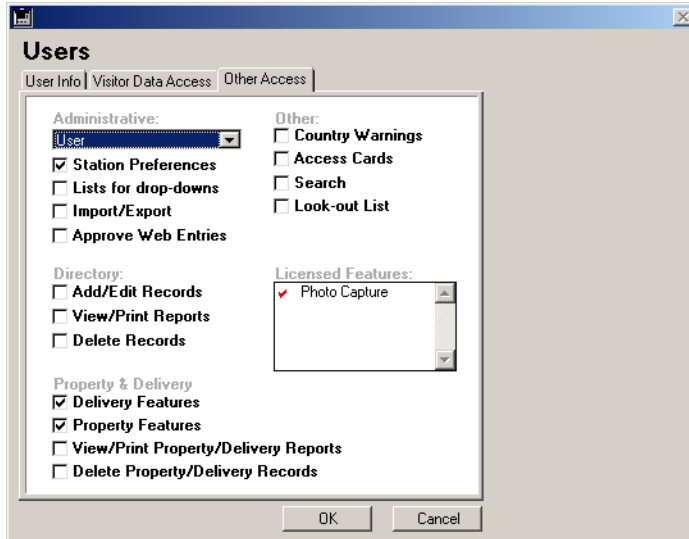
## Enabling the Photo Capture Feature for User Accounts

The photo capture feature requires a license. In order to use the license, each user account must be given access to the license.

To Enable the Photo Capture Feature, File > Configure.

1. Select User Accounts.
2. Select the user and click **Modify**.

3. Click the Other Options tab.

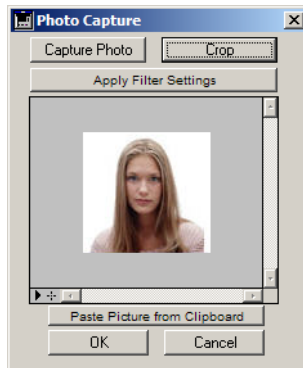


4. Click the Photo Capture License from the Licensed Features list.
5. Click **OK** to save.

To Test the Photo Capture Feature:

1. Select New from the Explorer.
2. Enter a First and Last name.
3. Click the **Capture Photo** button. This will launch the TWAIN driver.

- Capture the photo in the driver. Once you finish, the photo captured should be displayed in the Photo Capture screen.



- Click **OK** to save the photo.

## NDA Feature Configuration

The NDA (Visitor Agreement) feature requires the following items:

- Installation of Signature Capture Hardware (if used)
- Enabling the NDA system setting
- Configuring the Directory Categories
- Configuring the Workstation Settings

Before you begin to configure the NDA features, you should consider the different ways to setup this feature.

## Using a Visitor Sign-in Station

If you are using a Visitor Sign-in Station, then the NDA text will be displayed to the visitor on the screen after the visitor enters the required information. The text can vary depending on which category (Visitor, Contractor, etc.) they select. Once the NDA is displayed, you can require that the visitor simply clicks the **Accept** button or you can require that they sign a digital signature pad and then click **Accept**. The signature is electronically stored in PassagePoint. You can also either require that the NDA be accepted to complete the entry or allow the visitor to decline the NDA and still complete the entry. If the Visitor Sign-in Station is used without a receptionist verifying the entry, it is recommended to require acceptance of the agreement. Please refer to the *Visitor Sign-in Stations* section of this manual for information on how to require NDA acceptance. If the NDA covers a period of time, say twelve months, you can set PassagePoint to only require a new signature from that visitor after the twelve month period.

## Reception Administration of NDA

If the Receptionist administers the NDA, the visitor's name and company are entered. Then the receptionist clicks the **Capture** button which activates the signature capture pad. The visitor should be shown and allowed to read the NDA text in hard copy form. This can be displayed in a plastic stand or flat on the counter top. The receptionist can view the signature on screen before completing the entry.

## Software Requirements for Signature Capture

The PassagePoint installer automatically installs all required software.

## Hardware Requirements for Signature Capture

The AtPOS Penware 1500 signature tablet works with PassagePoint to capture digital signatures. A serial port is required for this device. Please refer to the AtPOS documentation for questions about specific requirements. Contact your PassagePoint representative for pricing and availability.



## NDA System Settings

In order to use the NDA feature, it must first be enabled in the Configure screen. By default, this feature is not enabled.

To Enable the NDA Feature, select File > Configure (on the Client).

1. Select Options/Features from the menu.
2. Select the Display NDA to Visitors check box.
3. Click **OK** to save changes.

To Set a Period of Time covered by NDA, select File > Configure (on the Client).

1. Select Options/Features from the menu.
2. Enter the number of months until a new signature is required.
3. Click **OK** to save changes.

To Make Acceptance Required on the Visitor Sign-in Station, select File > Configure (on the Client):

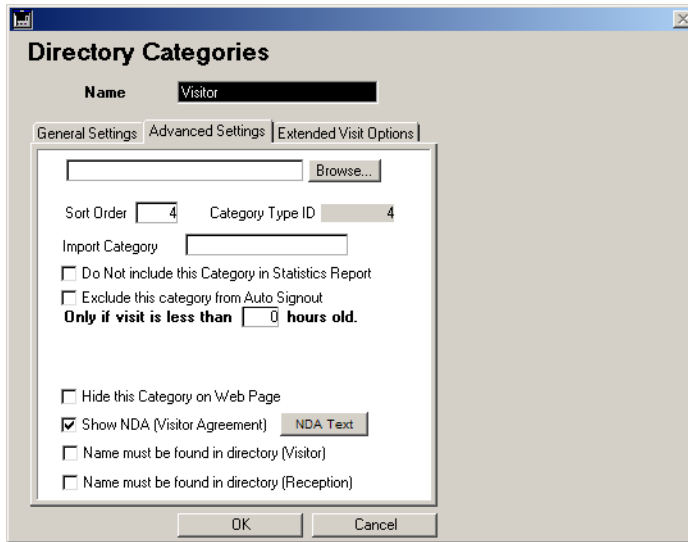
1. Select Sign-in Stations Profiles from the menu.
2. Select the Sign-in Profile to use and click the **Modify** button.
3. Click the Settings tab and Select the Require NDA Acceptance check box.
4. Click **OK** to save changes. Please refer to the *Sign-in Stations* section of this manual for more information.

## Configuring Directory Categories

Each Directory Category that requires an NDA must be configured.

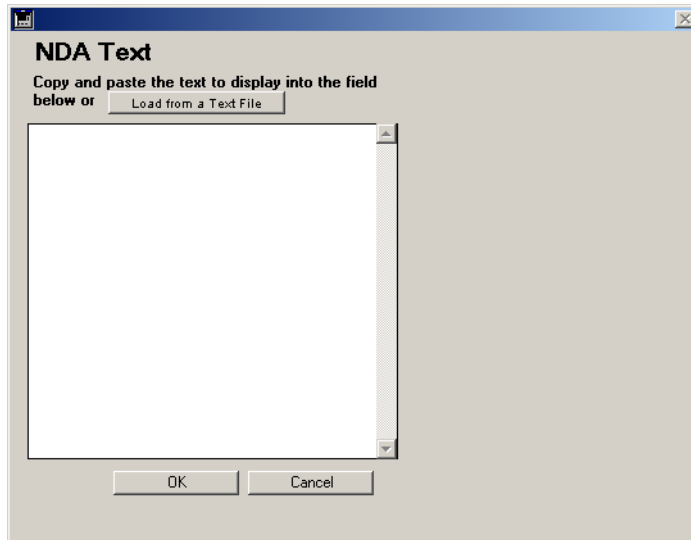
To Enable the NDA feature for a Category, select File > Configure (on the Client).

1. Select Directory Categories from the menu.
2. Select a category and click the **Modify** button.
3. Click the Advanced Settings tab and select the Show NDA check box.



To Load NDA Text for each Category, select File > Configure (on the Client).

1. Select Directory Categories from the menu.
2. Select a category and click the **Modify** button.
3. Click the Advanced Settings tab and click the **NDA Text** button.



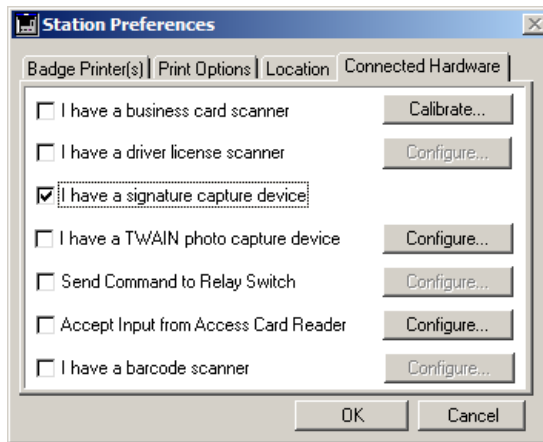
4. Copy and paste the NDA text into the large text field or click the **Load From a Text File** button and find the NDA file.
5. Click **OK** to save changes.

## Workstation Settings

If a signature capture pad is being used for the NDA feature, the workstation must setup to work with the signature pad.

To Configure the Workstation for Signature Capture, File > Station Preferences (on the workstation).

1. Select the Connected Hardware tab.



2. Select the "I have a signature capture device" option.
3. Click **OK** to save changes.

## Unattended Lobby (Web Pre-Registration)

PassagePoint can be used in unattended lobbies. A visitor sign-in station would be used by the visitor to enter their information and print a badge. The Web Pre-Registration allows employees within the building to pre-register their guests prior to their arrival. To maximize security, you can require that only those guests who are pre-registered can sign-in.

To Require Visitors be Pre-Registered, select File > Configure (on the Client).

1. Select Sign-in Station Profiles from the list.
2. Select the Sign-in Profile to use and click the **Modify** button.
3. Click the Settings tab and select the Require Pre-Register Match check box.

## Using Windows Terminal Server and Citrix

PassagePoint can be used with Windows Terminal Server and Citrix. This configuration can be used by one user or by all users. To make this configuration work, User Accounts and Lobbies need to be configured properly.

### User Accounts

Normally, the station preferences are stored locally on each workstation. These preferences tell PassagePoint which building the workstation is in and what printer should be used for badge printing. When using Windows Terminal Server and Citrix, station preferences are stored on the Windows Terminal Server machine. In order for PassagePoint to know the location of the workstation, it must ask the user to select the location each time they log into PassagePoint.

To make PassagePoint ask the location each time, select File > Configure (on the Client).

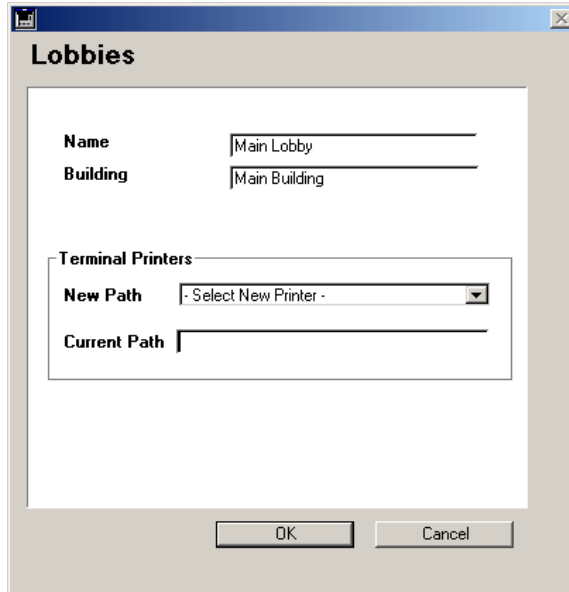
1. Select Users Accounts from the menu.
2. Select the User Account to be used with Citrix and click **Modify**.
3. Click the User Terminal Server Settings check box.
4. Click **OK** to save changes.

## Lobbies

Once PassagePoint knows in which location the workstation is located, it will use the associated printer set for that lobby. So, for each lobby that will use Windows Terminal Server and Citrix, the printer must be selected.

To set the printer for a Lobby:

1. Launch PassagePoint from that lobby's workstation.
2. Select the printer as the default printer in Windows.
3. Perform a test print from the driver properties to confirm connectivity.
4. Select Configure from the File menu.
5. Select Building/Lobbies from the menu.
6. Select the Building and click **Modify**.
7. Select the Lobby and click **Modify**.
8. Select the printer from the menu.



**Lobbies**

Name

Building

**Terminal Printers**

New Path

Current Path

OK Cancel

9. Click **OK** to save changes.

To Test Terminal Server Settings:

1. Log into PassagePoint with a user account setup for it.
2. Select the location where the workstation is located.
3. Enter a visitor and print a badge.

## Using WYSE WinTerminals

PassagePoint has been tested and works with WYSE WinTerminals.





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## Administrative Tasks

PassagePoint has been designed to require as little maintenance and administration as possible. Once the initial setup is complete and configured, PassagePoint will handle the daily data maintenance so that users and administrators don't have to. At times, there are administrative tasks that need to be done.

### Automated "Clean-up" Features

PassagePoint has automatic functions that handle routine "clean-up" tasks. For example, every 24 hours, the visitor log can be scanned for visitors who forgot to sign-out. These visitors are then automatically signed out and added to the "daily email report." If the visitor was assigned an access card they are also added to the report. This report is then Emailed to an administrator to take follow-up action.

### Deleting Records

To delete a record or a group of records, you must first select the record(s) from a search or report.

1. Log in as the Admin user.
2. Select Visitor Log from the Reports menu.
3. Enter a date range to display and click **OK**.

4. Select the records you wish to delete. Select more than one record by holding down the Control key while you click on the records. To select a large consecutive group of records, select the first record, hold down the Shift key and select the last record. This will highlight all of the records in between.
5. Click the **Delete** button to permanently delete the records. If large numbers of records are deleted, you may consider compacting the data file to remove spaces left behind by deleted records.

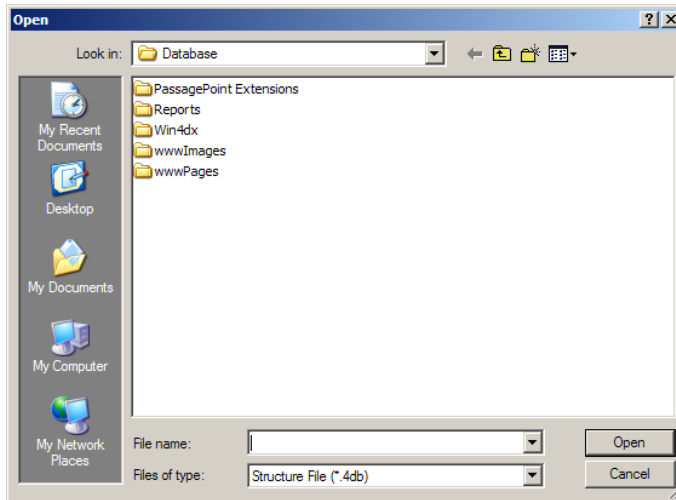
## Creating a Segmented Data File

PassagePoint allows you to create many segments to a data file allowing the data storage capacity to reach upwards of 128 GB. Each Data Segment in PassagePoint has a minimum capacity of just under 2 GB. For installations that capture large amounts of data, it is recommended to create enough data segments to last 12 months or more.

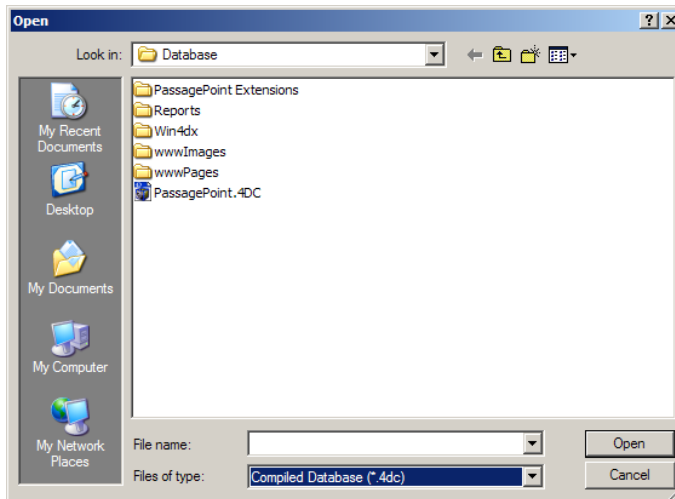
Follow these instructions if you have a data file that has reached its capacity or if you are setting up a new installation that will rapidly expand beyond the 2 GB capacity of the first data segment.

1. Shutdown the PassagePoint Server application or standalone application.

2. Launch the Tools application located inside PassagePoint's Utilities directory. The Open Database dialog will be displayed.

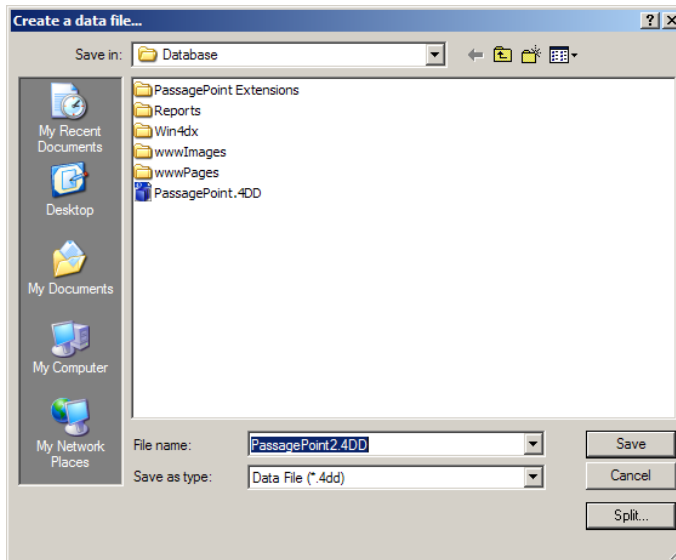


3. Change the "Files of Type" drop-down to "Compiled Database".



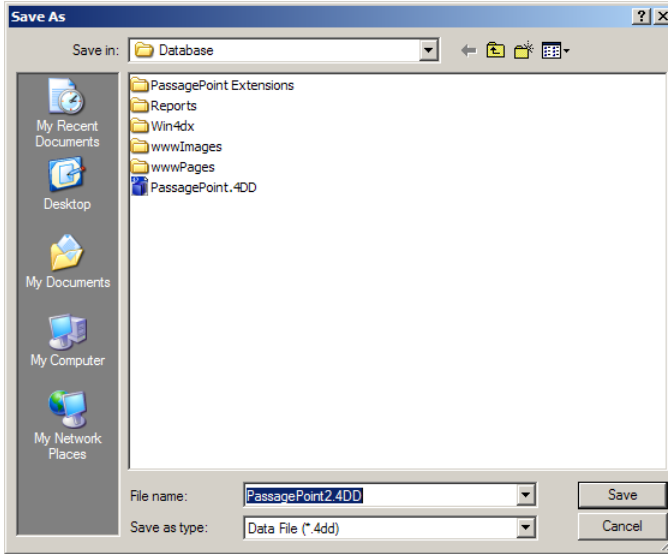
4. Select the "PassagePoint.4DC" file located in either the "PassagePro\_Folder" or the "Database" directory.

5. In version 3.3 or older, the password dialog will be displayed. Enter the admin user name and password.
6. The Tools screen will be displayed.
7. Click the "Compact" button. In version 3.5 or newer, this is located under the "Maintain" tab.
8. The "Create a data file" window will be displayed.

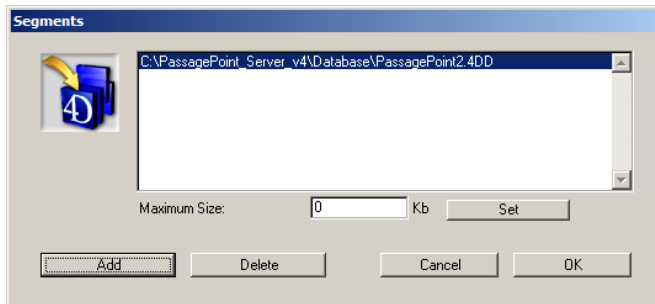


9. Click the "Split..." button.
10. The Segments window will be displayed

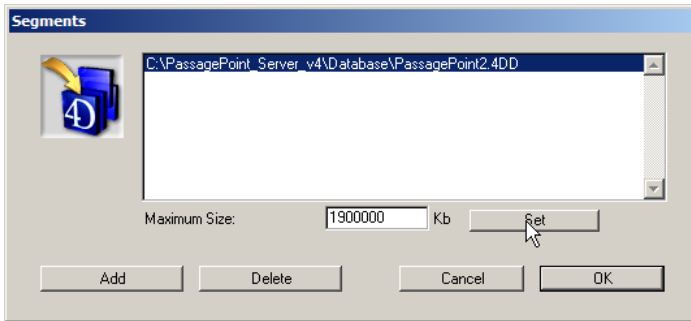
11. Click the “Add” button.



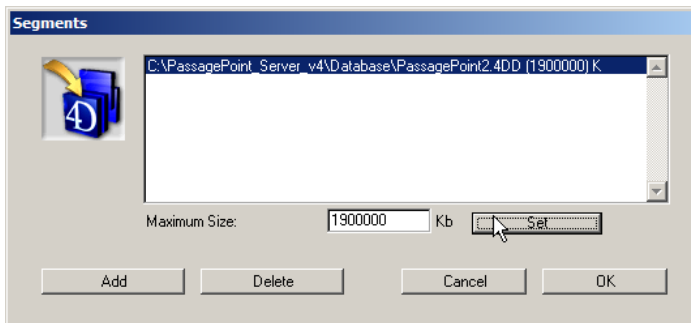
12. Name the new data file something different than the older data file and click Save.



13. Enter in the maximum size of this segment as 1,900,000 and click the Set button.

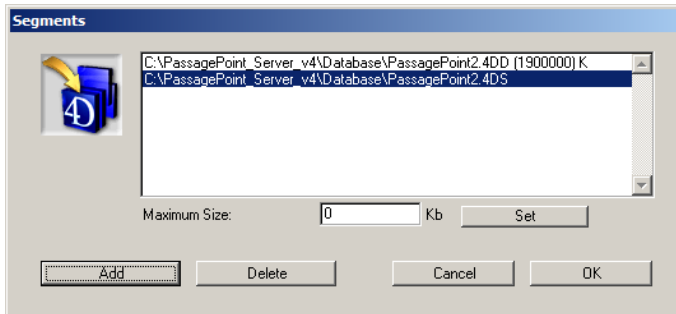


14. The Maximum Size will be displayed next to each segment.

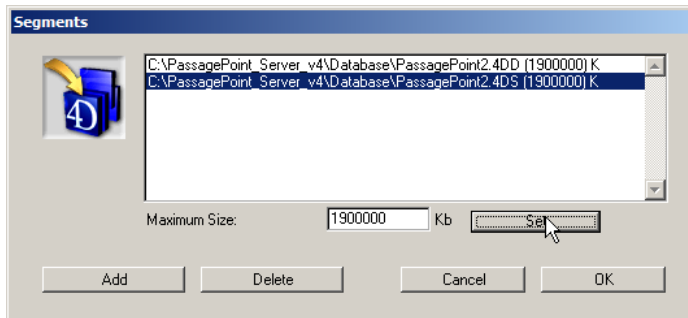


15. Click the Add button to add each segment.

16. The Name of the segments will have a number at the end. Click Save.



17. Enter in the maximum size of this segment as 1,900,000 and click the Set button.

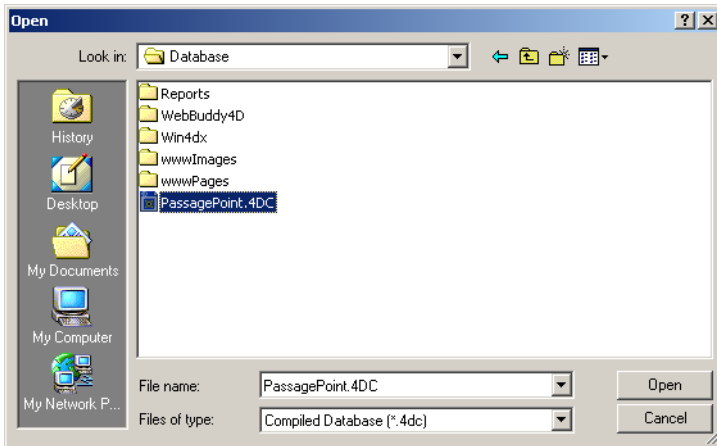


18. Keep adding more segments until you have enough for your location's needs.
19. Click OK on the Segments window when finished. Now your data file is ready for the higher capacity of the various segments.
20. Launch the PassagePoint Server application or the standalone and hold down the ALT key. This will prompt you to select your data file. Select the new .4DD file you created with Tools. The new data file will automatically know to add data to the additional segments once it reaches its limit.

## Compacting the Data File

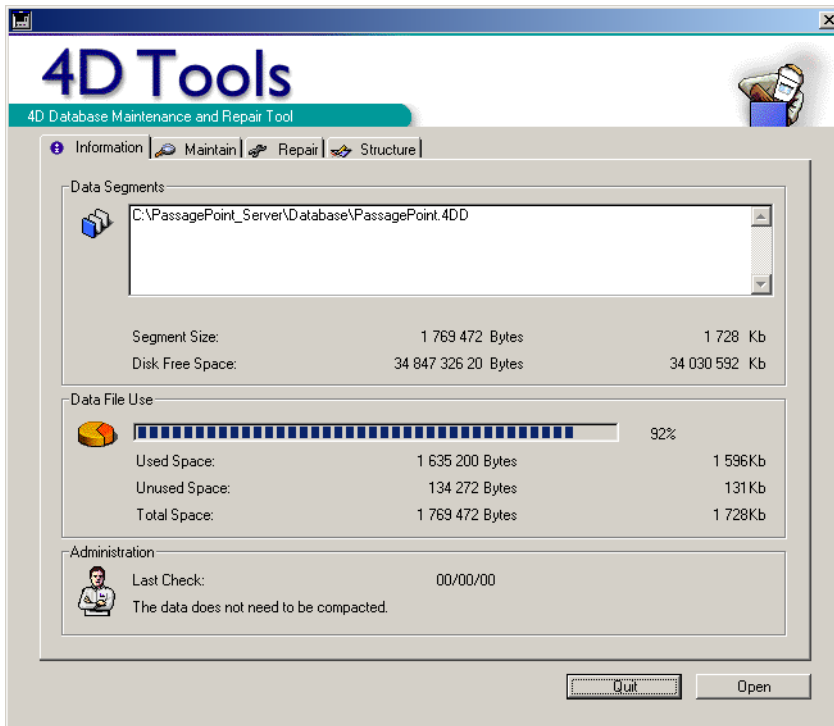
Periodic compacting of the data file is usually recommended for heavy traffic systems. This process keeps the data file as small as possible to maximize system performance.

1. Exit the PassagePoint Server
2. Launch the 4D Tools application located in the utilities folder inside the PassagePoint\_Server folder.
3. Once 4D Tools launches, the Open screen will appear.



4. Select Compiled database from the Files of type menu at the bottom of the screen.
5. Locate and Select the "PassagePoint.4DC" file inside the Database folder. Click **Open**.
6. The Tools Viewer screen will be displayed.

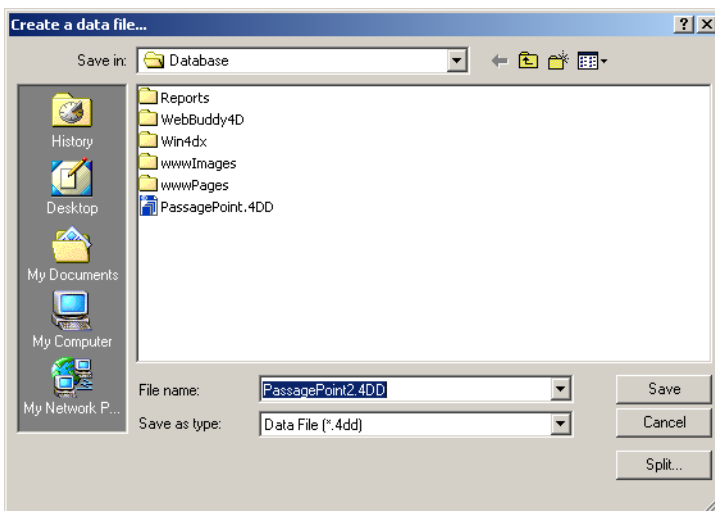




7. Click the Maintain tab.



8. Click the **Compact** button. The Create a data file screen will appear.
9. A new data file will be created. The default name will be "PassagePoint2.4DD." It is recommended that you do not replace the original data file but rather keep it as a backup copy.



10. Click the **Save** button. The Compacting will begin.
11. Once the Compacting is finished, exit the Tool application.
12. To use the new "compacted" data file, rename it to the default "PassagePoint.4DD" file name. You may have to rename the original data file first. Launch PassagePoint.

## Creating a New Blank Data File

At some point, it may be necessary to create a new blank data file. Configuration settings and serialization will be cleared in the new data file.

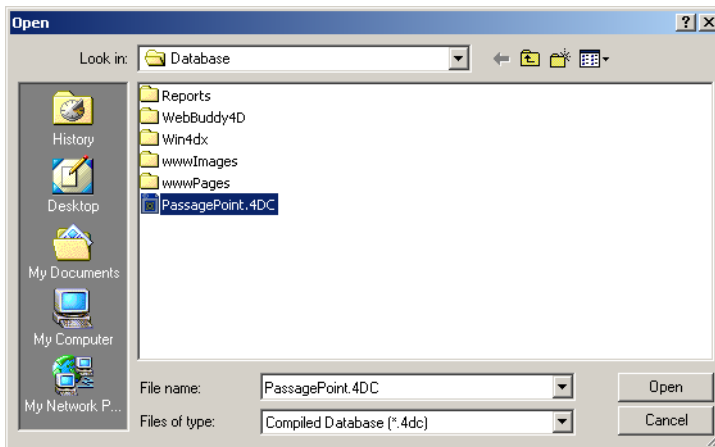
1. Launch the PassagePoint Server or Standalone application while pressing the Alt key on the keyboard.
2. The Open Which Data File screen will appear.
3. Click the **New** button. The Create a data file screen will appear.

4. Name the new data file and click **Save**.

## Checking and Repairing the Data File

At some point, it may be necessary to check the data file for errors. This is done using a Tools application included with the installer.

1. Exit PassagePoint
2. Launch the 4D Tools application located in the utilities folder inside the PassagePoint\_Server folder.
3. Once 4D Tools launches, the Open screen will appear.



4. Select Compiled database from the Files of type menu at the bottom of the screen.
5. Locate and Select the "PassagePoint.4DC" file inside the Database folder. Click **Open**.
6. The Tools Viewer screen will be displayed.
7. Click the Maintain tab.



8. Click the **Check All** button. A Report will show the results of the check.
9. The checking process can take some time.
10. To fix any errors, click the Repair tab and click the **Repair All** button.

## Data Back-up Options

PassagePoint can be backed up several different ways. Some include:

- Using a corporate backup system (with open file manager support).
- Using the built-in backup feature (for server-based systems only). Please refer to the *Server Configuration* section of this manual for more information.
- Making periodic manual copies and archives of the data file ("PassagePoint.4DD" and "PassagePoint.4DR").

It is recommended that some sort of backup process be used to ensure the safety of the data.

## Rebuilding Indexes

Rebuilding indexes is not normally necessary. PassagePoint automatically handles indexes. At times, however, it may be necessary to manually rebuild the index table.

1. Launch PassagePoint using the admin password.
2. Select Configure from the File menu.
3. Select Admin Tools from the menu.
4. Click the **Rebuild Indexes** button. Confirm that you wish to proceed.
5. A status window will appear during the operation.

## Data Replace Tool

Use the Data Replace tool to replace the security level or Primary destination with some other value. Select File > Config > Other > Admin Tools.

1. Select date range, category, location, and the field (either security level or destination).
2. Replace field > data in field you are looking to match with field > new data.

## Reset Numbers

To Reset Numbers, select File > Configure > Other > Admin tools.

1. Select the Reset Numbers button.
2. Click ok to confirm.
3. The Reset Numbers window appears. Select the table to modify.
4. Select the Change Base Number button.
5. Enter the new number.
6. Click Done to continue.

## Access Control Integration

PassagePoint is able to integrate with various Access Control systems. This integration allows PassagePoint to enable and disable Access Cards, set permissions, print barcoded access badges and much more. An Access Control Add-on license is required to use this functionality. Please refer to the Access Control Integration addendum located on the PassagePoint CD for more information.

## Directory Link


PassagePoint is able to connect in real-time to external data sources for directory (ie. Employee) information. This connectivity provides the latest available information and eliminates the need to import directory information. A Directory Link Add-on license is required to use this functionality with the Professional Edition. To learn more about connecting to an Access Control system's directory, please refer to the Access Control Integration addendum located on the PassagePoint CD for more information.

### Directory Linking with LDAP

1. Choose LDAP from the Database Connection Type dropdown menu.
2. Enter the LDAP server address. This may be in the form of an IP address (e.g., 123.456.789.250) or a domain name (myldaps-  
server.com).
3. Enter the Search Base for your LDAP system. This is the part of the distinguished name all `_directory_` type objects should contain. The Search Base constrains the type of data to be returned from the LDAP server to those appropriate for directory lookups (employees, contractors, etc.). An example of a Search Base might be `_DC=sj,DC=stopware,DC=com_` where `_sj_` stands for San Jose and `_stopware_` is your company name. This setting will vary for each LDAP server. If you are not sure what your Search Base is then you need to consult your LDAP administrator.
4. Enter a Search Filter. Similar to the Search Base above, the Search Filter also constrains the data to be returned. Think of the Search Base as limiting the type of object and the Search Filter as limiting which objects are to be included in your search. Use `_(sn=*)_` if you do not wish to limit the data returned.



5. Enter a User Name and Password. This must be a user who has permission to view all the objects you may be searching for.
6. Click Map Lookup Fields... to map the LDAP attributes to the PassagePoint fields. This will open the Directory Lookup Mapping window. Select an attribute type from the LDAP System list and select the corresponding field from PassagePoint list the click the Map button. Repeat this step for all the PassagePoint fields which you wish to view and populate when search for directory data.

<b>Note</b> 	At a minimum, you must map the Unique_Value field.
--	--

When you are finished OK this window to save your changes.

## Enterprise Database Setup


The PassagePoint Enterprise Edition is able to use SQL Server or Oracle as the primary database. To learn more about connecting to an Enterprise database, please refer to the PassagePoint SQL Server addendum or the PassagePoint Oracle addendum located on the PassagePoint Enterprise CD.

## Security Alerts

To setup security email address and configure the threat level feature, I login as Admin and select select File menu > Configure > Security Alerts.

## General Security

Enter the email addresses for the recipients of security alerts, separated by commas.

<b>Note</b> 	Email features must be previously configured, including mail server, from address, etc.
--	---

## Time of Visit Expiration

Enter the email addresses for the recipients of visitor's time expiration alerts, separated by commas

## Threat level

### New

Click New to create a new threat level. Name the threat in the Title field of the popup window. Give the threat a sort order number, for example Critical = 1, Minor = 2. Enter instructions into the text box. Select an associated color for the threat level in the box on the lower left. Click OK to save.

### Delete

Select the threat level and click **Delete**.

### Modify

Select the threat level and click **Modify**.

### Current Level

Select the **Current Level** of the threat in the drop-down window.

## Permission Lists

This feature is related to the Access Control option. Refer to the Access Control Integration addendum located on the PassagePoint CD for more information.

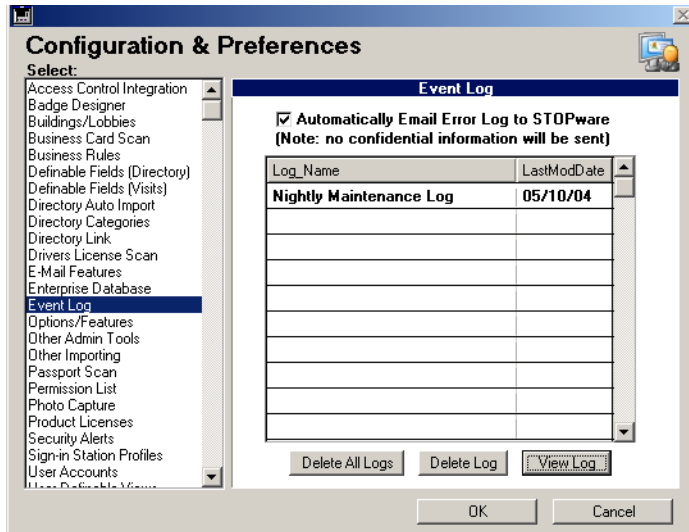
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## Tips/Troubleshooting

### Events Log

PassagePoint uses Events logs to record certain transactions and activity. These logs can assist you in troubleshooting a problem. The Logs available include:

- Email Error Log: Captures errors that occur while sending Emails in PassagePoint.
- Error Manager Log: Captures Application errors that occur in PassagePoint.
- Import Log: Captures the Directory Auto Import results.
- Nightly Maintenance Log: Captures the nightly clean-up routine results.



To View the Event Logs, select Configure from the File menu (on the Client).

1. Select the Events Log option from the menu.
2. Select the Log you wish to view and click the **View Log** button.
3. Once the Log is displayed, it can be printed by clicking on the **Print Log** button.

## Error Codes

### Network Connection Error Codes

<u>Code</u>	<u>Description</u>
-------------	--------------------

- 10001 Lost connection with server - Timeout error - attempt reconnect
- 10002 Lost connection with server for current task - Timeout error - attempt reconnect
- 10030 Client and Server are desynchronized - restart client.
- 10031 Client and Server are desynchronized - restart client.
- 15301 Record is locked - Cannot be modified at this time

## Email Error Codes

### Code    Description

- 10006 From address missing
- 10007 To address missing
- 10033 SMTP 421 - Service not available, closing transmission channel.
- 10034 SMTP 450 - Requested mail action not taken: mailbox unavailable.
- 10035 SMTP 451 - Requested action aborted: local error in processing.
- 10036 SMTP 452 - Requested action not taken: insufficient system storage.
- 10037 SMTP 500 - Syntax error, command unrecognized.
- 10038 SMTP 501 - Syntax error in parameters or arguments.
- 10040 SMTP 503 - Bad sequence of commands.
- 10041 SMTP 504 - Command parameter not implemented.
- 10042 SMTP 550 - Requested action not taken: mailbox unavailable.
- 10043 SMTP 551 - User not local; please try <forward-path>.
- 10044 SMTP 552 - Requested mail action aborted: exceeded storage allocation.
- 10045 SMTP 553 - Requested action not taken: mailbox name not allowed.
- 10046 SMTP 554 - Transaction failed.
- 10064 No response has been received within the given timeout period.

## Miscellaneous Error Codes

### Code    Description

- 51 File not loaded properly.
- 3.CMP File is corrupt - delete .cmp file
- 9998 Unique value expected.

## Problem/Solution

### Installation

#### Turn Off Virus Software

Before installing PassagePoint software, temporarily disable your virus software. This will reduce the chances of conflicts during the install process. Once the installation is complete, turn your virus software back on.

#### Close All Programs

Before installing PassagePoint software, close all other programs that could be running. This will reduce the chances of conflicts during the install process.

### Client/Server Installations

#### Cannot connect to server

*Problem:* I get an error immediately after selecting the PassagePoint server.

*Cause:* The server is not running or is down.

*Remedy:* Check that the server is still running.

or

*Cause:* The IP address of the server is not the same as the one saved on the client.

*Remedy:* Check that the servers IP address is the same as the one saved on the client.

*Problem:* After entering a password the client application crashes.

*Cause:* The "PassagePoint.res" and "PassagePoint.rex" files which are used to update client changes from the server are corrupted.

*Remedy:* Delete the "PassagePoint.res" and "PassagePoint.rex" files from the "4D" folder inside the Windows or WinNT folder. The files will be automatically recreated the next time you make a connection to the server. Locate these files in: Documents and settings\user directory\application data\4D\PassagePoint.4DB

## **Printing/Printers**

*Problem:* Nothing prints or printer does not respond.

*Cause:* The printer is not connected properly or is turned off.

*Remedy:* Check the printer's connection to the computer and the power supply. Check that it is turned on. Try to perform a test print from the printer driver properties window.

*Problem:* Printer feeds more than one label for each badge I print.

*Cause:* The badge design is too large for the paper size in the printer.

*Remedy:* Re-design the badge to fit the paper size used. Be sure that there are no "hidden" objects outside the badge area.

*Problem:* When I print a badge, it prints in portrait mode when I want it to print in landscape mode.

*Cause:* By default the badge will print in portrait mode.

*Remedy:* Change this setting in the printer's driver settings



## Web Server

*Problem:* When I try to access the web server, I get something else or a page not found message.

*Cause:* There is probably some other web service running that is using the TCP port 80.

*Remedy:* Disable or Uninstall the other web serving software or change the port setting in the server's database properties.

## Email

*Problem:* When I use the Email features, the Email is never received.

*Cause:* There may be a conflict with the SMTP server.

*Remedy:* Check the SMTP server and make sure that the Email is not being rejected. Sometimes the SMTP server's configuration can cause Emails to be rejected if certain criteria aren't met. For example, if the "From" Email address is not a valid address, the SMTP server may reject it.

## Technical Support

Contact your PassagePoint representative for support options and software maintenance plans.



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