

# LobbyWorks<sup>®</sup> Visitor System Process Questionnaire

Initial Date Completed: \_\_\_\_\_

Revised Date: \_\_\_\_\_

Sales Person:

Name \_\_\_\_\_ Title: \_\_\_\_\_

Office Phone: \_\_\_\_\_ Mobile Phone: \_\_\_\_\_

Email Address \_\_\_\_\_

Customer Contact:

Name: \_\_\_\_\_ Title: \_\_\_\_\_

IT Person: \_\_\_\_\_ Title: \_\_\_\_\_

**Table of Contents**

Glossary of Terms .....3  
Customer Information .....4  
    Why an electronic Visitor Management System? .....4  
        *Visitor Registration* .....6  
        *Registration Station Process* .....6  
Advanced Features .....7

## Glossary of Terms

<b>Host</b>	Host as defined in LobbyWorks is a Person or Employee at your facility that is permitted to receive a Visitor.
<b>Pre-Registration</b>	Pre-Registration is the first process in the LobbyWorks visit life cycle. This process involves input of basic data such as the visitor's name, date/time expected and email address. Pre-Registration can generate an email to the Visitor containing information to assist with efficient processing upon arrival. This step is optional to allow for walk up visitors, however pre-registered visitors are typically fully processed much more efficiently.
<b>Registration</b>	Registration is the second process in the LobbyWorks visit life cycle. The Registration process is typically completed when the visitor arrives and can involve the taking of a picture, scanning of a business card or driver's license and notification of the Host.
<b>Authorization</b>	Authorization is the Third Process in the LobbyWorks visit life cycle. Authorization is simply asking an operator or Host whether they would like to accept the pending visit. Authorization can be done through the FrontDesk Workstation or can become part of the notification to the Host through the use of the Notify Application (small application that can pop –up visit details and request acceptance from the PC desktop)
<b>Signed In</b>	“Signed In” indicates that a visitor has proceeded through the first three steps in the lifecycle and is now processed and now considered visiting the facility.
<b>Signed Out</b>	“Signed Out” indicates that a visitor is no longer on premise but may return without being processed as a new visitor.
<b>Closed</b>	“Closed” is the final stage of a visit life cycle and indicates that a visitor has left the premise and may not return without being re-processed. LobbyWorks does match previous visits to speed the processing of returning visitors.

## Customer Information

### ***Why an electronic Visitor Management System?***

*What are your goals regarding visitor management?*

---

---

---

- Screen and identify visitors
- Know who is expected to visit with Pre-Registration of visitors
- Expedite Visitor Registration process
- Automate communications between visitors and host employee
- Maintain a visitor database for generating reports or investigations
- Visually identify visitors w/ visitor badges

*What is your current visitor process?*

---

---

---

- Nothing or Paper Log Book
- No photo ID required
- Photo ID required (driver's license, passport...)
- Visitor Badge (printed or written)
- Issue a Pro-Watch access control card to a visitor
- Use the visitor bar code in Pro-Watch as a card number for a visitor
- Issue a Pro-Watch temp card to employees
- Operator manually calls host to notify of visitor's arrival
- Escort required for most visitors? (yes or no)

### ***General Description of Environment***

*About how many Visitor Registration Stations would you need? Indicate location types as well as geographic location (Parking lot entrances, building entrances, loading dock, specify buildings/floors and location.)*

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_

10. \_\_\_\_\_

*Add more if required on Reverse.*

*What types of visitors do you normally receive a day and about how many of each?*

Visitors \_\_\_\_\_  
Contractors \_\_\_\_\_  
Service \_\_\_\_\_  
Temporary Employee Pass \_\_\_\_\_  
Other \_\_\_\_\_  
Other \_\_\_\_\_

*About how many total visitors a month do you receive?* \_\_\_\_\_

*Foreign Visitors – do you have special requirements for Foreign Visitors or Non-US Citizens visiting your facility?* \_\_\_\_ Yes \_\_\_\_ No

\_\_\_\_ All Foreign Visitors must be pre-registered prior to visiting facility

\_\_\_\_ All Foreign Visitors must receive authorization before they can be pre-registered to visit our facility

\_\_\_\_ Only approved employees may pre-register Foreign Visitors

\_\_\_\_ All Foreign Visitors must agree to a Visitation Agreement during registration

\_\_\_\_ We generate a report regarding all Foreign Visitors that enter our facility on a regular basis

*Do you want visitors to be Pre-Registered? (if so, select how)*

\_\_\_\_ by employees from their desktop in a web-based software module

\_\_\_\_ by the receptionist/guards at the registration station

\_\_\_\_ by integration with MS Outlook via vcalendar invite

*Do you want your Visitors to receive an email with pre-registration information to assist them in the Sign In process?* \_\_\_\_\_.

*Do you also allow visitors to walk-up and visit without being pre-registered?*

\_\_\_\_ Yes, we will allow visitors to either walk-up or be pre-registered

\_\_\_\_ No, we require all visitors to be pre-registered prior to visiting

*Do you want to track when the visitors leave and/or re-enter the facility? That is, when a visitor leaves the facility (i.e. goes to lunch), the visitor badge is swiped by a barcode scanner to “sign-out” the visitor. When the visitor returns (i.e. arrives back from lunch) the badge is swiped again and the visitor is “signed-in”. A list of “All Signed In Visitors” is available in Front Desk and Web Center Visitor Manifest at any time. Reports may also be generated in Reporter.*

\_\_\_\_\_ Yes, either the visitor, employee or guard will swipe the visitor badge with the barcode scanner to either sign-in or sign out the visitor.

\_\_\_\_\_ No, we will not be tracking when visitors leave the facility. At a scheduled time (i.e. end of day), LobbyWorks can be set to automatically “Sign-Out and “Close” all visitors that have a “Signed-In” status.

## **Visitor Registration**

*What steps do you want your electronic visitor process to include?*

---

---

---

- Pre-registration of visitors
- Scan Business Card
- Scan a Photo ID (driver’s license...)
- Take Photo of Visitor
- Print Visitor Badge
  - \_\_\_\_\_ 4 x 6 fold-over paper badge w tamper-resistant strip (color or b/w)
  - \_\_\_\_\_ time-expiring badge (black/white)
  - \_\_\_\_\_ adhesive badge (black/white)
  - \_\_\_\_\_ pvc plastic card badge (color or b/w)
  - \_\_\_\_\_ other \_\_\_\_\_
  - Please indicate which is more important; **Print speed** or **Print Resolution** \_\_\_\_\_.
- Capture electronic signature
- Assign temporary access card to visitor

## **Registration Station Process**

To register visitors, operators can register visitors as they enter the lobby and/or the visitors can self register at a LobbyWorks Kiosk.

Front Desk Station – the operator (guard, receptionist...) receives the information (business card, photo ID...) from the visitor and processes it (scans card, takes visitor photo and prints badge) in the Front Desk Registration Station.

Kiosk Self-Registration Station – the visitor walks up to the kiosk and enters their information, scans card and takes photo. Badge can be printed at the kiosk or at the Front Desk station where a guard can verify the information that was entered in the kiosk.

*Do you want an operator to register all visitors at the Front Desk Station?*

---

*Do you want visitors to optionally use a self-registration kiosk to register and then proceed to the manned Front Desk Station to pick up their badge? Alternatively, visitors may also register at the Front Desk Station as well.*

---

*Do you want the kiosk to register visitors, print the badge and contact the employees without any operator involved? \_\_\_\_\_.*

## ***Advanced Features***

### Communications from Receptionist / Guard to Host

LobbyWorks can make automated communications from the registration stations to the general receptionist, host employee or a delegated host. The automated communications include the following methods which can be selected by method or in succession and in any order per each category of employee.

*Would you like for LobbyWorks to automatically contact the host that a visitor has arrived? Select from the following methods to send communications:*

- To employee's PC\*. Displays a photo and text details of the visitor
- To email

Communication Notes:

\* requires LobbyWorks Notify software module

### Pre-Registration through LobbyWorks Web Center

LobbyWorks allows employees to manage their own visitors. The Administrator can choose which features of Web Center are available to the employees. Features include Pre-Registering (single, one time visit) and Pre-Authorizing (window of time to visit) individuals and / or groups, creating their own personal Unauthorized List of who cannot visit them although the visitor can visit other employees. This personal employee Unauthorized List is different and separate from the facility Watch List which is managed by the Security Team. Individuals on the Watch List are not allowed in the facility.

*Do you want employees to pre-register their own visitors at their desktop? \_\_\_\_\_.*

### Pre-Registration through Outlook

LobbyWorks allows visitors to be automatically pre-registered by inviting them to a meeting in Outlook. The employee sends out a meeting invitation to the attendees

and invites LobbyWorks to the meeting. LobbyWorks then compares the attendee list to the host employee database and if the attendee is not in the database, LobbyWorks will automatically pre-register the attendee as a visitor for the meeting at the date/time of the meeting. This includes recurring meetings in Outlook.

*Do you want to activate this Calendar Pre-Registration feature in LobbyWorks?*

\_\_\_\_\_.

## Host Population

LobbyWorks maintains a list of Employees or (Hosts). Each Host has attributes associated with them that allow LobbyWorks to authenticate the Host for Web Center use and/or send a notification to the Host when a Visitor Signs In.

LobbyWorks can automatically import Hosts from Active Directory (Domain Infrastructure). LobbyWorks also allows for manual imports of Hosts from Comma Separated text files and additionally Hosts can be imported.

If you will be using LobbyWorks Web Center with Windows Authentication, LobbyWorks will need to be aware of the Hosts Windows Username.

If you will send email notifications to Employees (Hosts), LobbyWorks will need to be aware of the Hosts Email.

*How many Hosts (Employees) do you plan to serve with LobbyWorks?* \_\_\_\_\_.

*Do you wish to automate the import of Hosts into LobbyWorks?* \_\_\_\_\_.

*Do you plan to use Active Directory authentication with LobbyWorks Web Center?*

\_\_\_\_\_.

*Do you plan to send email notifications to your Employee upon a visit Sign In/Sign Out?* \_\_\_\_\_.

*Do you have a source for attributes to authenticate and/or send email notifications as well as provide convenient information to reception desk operators? (Windows username, email address, phone numbers, last name, first name, department, etc)*

\_\_\_\_\_.

*Please indicate which available source you would prefer to leverage (Active Directory, CSV File).*

\_\_\_\_\_.

## Asset Tracking

*Do you plan to track assets in and out of your buildings using LobbyWorks?*  
\_\_\_\_\_.

## Delivery Tracking

*Do you plan to track Deliveries in and out of your buildings using LobbyWorks?*  
\_\_\_\_\_.

## Project Timeline

*What is your timeline regarding a visitor management system?*  
\_\_\_\_\_.

## Project Team

*Do you have a project team assembled? \_\_\_\_\_.*

*Please list your team members and there associated roles.*

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**Additional Comments:**

---

---

---

---

---

---

---