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**BadgeBuilder Visitor**

# **Administrator's Guide**

**By NESCS, Inc.**



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# Overview

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## Program Description

BadgeBuilder® Visitor is a Microsoft Windows® program which can be run on Windows® 95, 98, ME, 2000 and XP. It is designed to allow companies to manage their visitors and provides facilities to create visitor badges, parking permits and fireman's rosters.

It can be installed on a network as a multi-user program, or as a single user station at a receptionist's desk. When installed on a network, employees can enter and maintain their own visitor appointments and be notified by email upon their visitor's arrival.

BadgeBuilder® Visitor allows for three types of users:

1. Employees - who can enter and maintain their appointments
2. Receptionists - who can enter appointments, receive and sign out visitors and prepared visitor badges
3. Administrators - who can manage databases, prepare reports and general oversee program operation.

BadgeBuilder® Visitor maintains three tables in its database. The employee table records users of the system; the visitor table contains information on visitors; and the appointment table contains appointments between the two.

Information in the employee table includes the employee's name, user name, encrypted password, department and other related details. The visitor table includes the visitor's name, company, vehicle license number, telephone numbers and other information, included 2 fields the administrator can set up for his needs. The appointment table stores details including the scheduled appointment date and time, the actual arrival time and when the visitor departed.

BadgeBuilder® Visitor works in conjunction with BadgeBuilder® at the reception desks and allows the capture of photographs of the visitor, scanning of materials such as driver's license and the acquisition of signatures, all of which are optional. It can then create a variety of badges and permits.

The BadgeBuilder® Visitor administrator can manage the database tables, set up information on the company, manage the BadgeBuilder® Visitor licensing system and create a variety of reports.

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## Installation Types

The installation CDROM contains a variety of different installation types to allow for appropriate installation of BadgeBuilder® Visitor. These include installations for the three types of users; employee, receptionist and administrator, as well as providing the ability to install the initial database only, a demonstration version of the program, or to transfer the BadgeBuilder® Visitor installer to a network or hard drive suitably configured for employee-type installations.

The BadgeBuilder® Visitor installation program will guide you through each of these installations, but reference to the remainder of this information will help ensure a smooth implementation.

### Networked Installation

BadgeBuilder® Visitor provides the most functionality when installed on a network. The database can be installed on a server where information is regularly archived. Employees can then enter and manage their own appointments and visits, while one or more reception stations can receive visitors and issue passes and permits to them.

### Standalone Installation

In a simple situation a standalone installation may suffice. In this scenario the receptionist enters all employee and visitor information and also creates the appointments, as well signing in and out the visitor and creating badges. In this case both the BadgeBuilder® Visitor program and its associated database are installed on one machine.

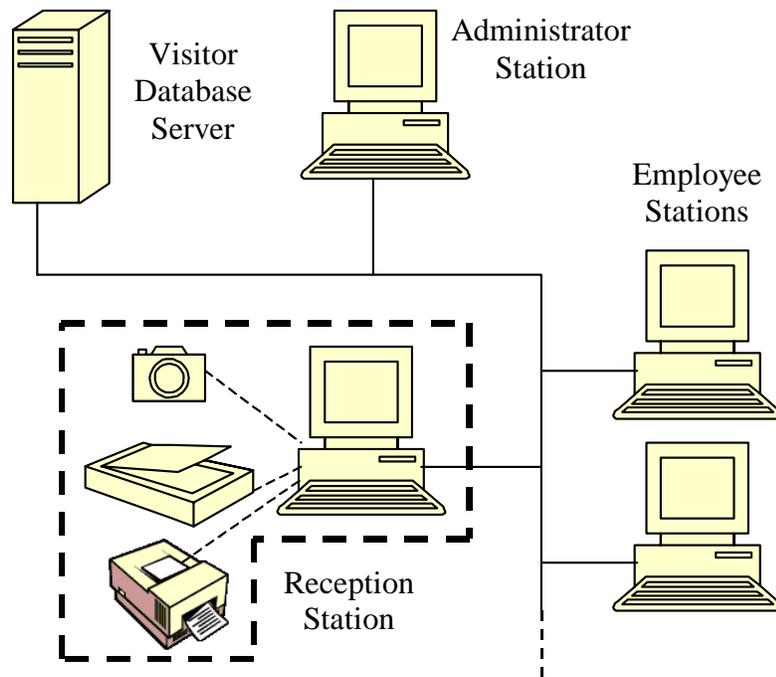
# Installation

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## Overview

BadgeBuilder® Visitor can be found on the BadgeBuilder® CDROM. The installer can install BadgeBuilder® Visitor for all types of stations, as well installing the BadgeBuilder® Visitor database only or transferring the installer to a hard disk.

For the most functionality, BadgeBuilder® Visitor will be installed on a company network. A typical installation diagram might look like this, although other configurations are possible.



It is not required that the BadgeBuilder® Visitor database be located in a separate server. It could be on any computer on the network as long as the folder containing the data has full read and write privileges for all the other users of the system. Similarly, a separate administration station is not mandatory. Administration can be performed at any station where BadgeBuilder® Visitor is installed.

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## Hardware Requirements

BadgeBuilder® Visitor itself does not require any special hardware. It will run on any PC running Windows® 95, 98, ME, 2000 or XP. For best performance the PC should have a clock speed of at least 200MHz and have at least 128Mb or RAM.

If a networked installation is anticipated, the PC must be equipped with a Network Interface Card (NIC) and the network should be configured for normal Windows® networking operation.

At the reception station BadgeBuilder® will be used to capture badge information such as visitor photograph, ID materials and fingerprints. NESCA, Inc. offers a wide range of hardware to accomplish these tasks. Please contact us directly at 508-476-9200 Monday through Friday 8am to 6pm ET for more information. More information is also available at <http://www.badgebuilder.com/>.

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## Administration Station

After starting the BadgeBuilder® Visitor installer, select the "Administration Station" set up type. You will then be asked to select the directory where the BadgeBuilder® Visitor program is to be located. If the directory does not exist it will be created.

Next you will need to specify where the BadgeBuilder® Visitor database is, or is going to be installed. If it already exists at that location you will be asked if you

wish to over-write it with an initial database. If in doubt, select NO. The location can be anywhere on the network, and you can install the initial database for the BadgeBuilder® Visitor network, if you wish.

At the end of the installation you can select whether or not to install BadgeBuilder®. You may wish to do this to allow the administrator to design badges or make changes to the BadgeBuilder® database. However, it will be necessary to equip the administrator machine with a BadgeBuilder® Visitor Security Key (Dongle) in order for this to be possible.

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## Reception Station

After starting the BadgeBuilder® Visitor installer, select the "Reception Station" set up type. You will then be asked to select the directory where the BadgeBuilder® Visitor program is to be located. If the directory does not exist it will be created.

Next you will need to specify where the BadgeBuilder® Visitor database is, or is going to be installed. If it already exists at that location you will be asked if you wish to over-write it with an initial database. If in doubt, select NO. The location can be anywhere on the network, and you can install the initial database for the BadgeBuilder® Visitor network, if you wish.

When installation of BadgeBuilder® Visitor is completed the installation of BadgeBuilder® will start automatically. Complete the BadgeBuilder® installation as directed by the installation wizard. BadgeBuilder® can be installed anywhere on the reception station computer. For further information on setting up BadgeBuilder® please see the BadgeBuilder® section.

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## Employee Station

After starting the BadgeBuilder® Visitor installer, select the "Employee Station" set up type. You will then be asked to select the directory where the BadgeBuilder® Visitor program is to be located. If the directory does not exist it will be created.

Next you will need to specify where the BadgeBuilder® Visitor database is installed. It must already exist to continue with the installation. If the installer is run from a copy transferred to a networked drive (see Transferring the Installer) then the correct path to the database will already be entered in the installation wizard dialog.

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## Database Only

After starting the BadgeBuilder® Visitor installer, select the "Visitor Database Installation Only" set up type. This set up type will allow you to install the BadgeBuilder® Visitor database on machine on the network that you have write access to. Typically this would be shared, networked location.

If the database already exists at that location you will be asked if you wish to over-write it with an initial database. If in doubt, select NO and you will be asked for a different location. Normally BadgeBuilder® Visitor will run on a network, using just one database.

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## Demonstration Installation

After starting the BadgeBuilder® Visitor installer, select the "Demonstration Installer" set up type. This will actually perform an installation identical to the Reception Station installer.

When BadgeBuilder® Visitor is run without a BadgeBuilder® Visitor Security Key (Dongle) attached, it only permits a total of 3 users in the employee database and up to 10 visitors in the visitor database.

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## Transferring the Installer

The administrator may find it desirable to transfer the installer to a networked drive (or possibly to a local drive for subsequent transfer to a CDROM). After starting the BadgeBuilder® Visitor installer, select the "Transfer Employee Station Installer" set up type. You will then be asked where to transfer the installer and the location of the BadgeBuilder® Visitor database.

It is not necessary for the database to already be installed at that location, but must eventually be for BadgeBuilder® Visitor to work. Typically the location will be on a network server with shared read and write access. The resulting installer copy will only run as an Employee Station set up and the location of the BadgeBuilder® Visitor database will already be filled in. Note that it is presented as a UNC path making it unnecessary for each employee to map a driver letter to the location.

# Configuration

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## Licensing

BadgeBuilder® Visitor is a licensed product. The license allows you to use the program and sets the maximum number of users who can be entered into the database.

### Overview

BadgeBuilder® Visitor is licensed to allow a maximum number of employees. Even if employees do not enter their own appointment information, BadgeBuilder® Visitor will not allow more employee names to be entered than the license allows.

The license count is contained in the BadgeBuilder® Visitor Security Key (Dongle). This key must be attached to the reception station because it also allows BadgeBuilder® to operate in a mode other than "Demo".

## Increasing the License Count

The license count in the key can be increased without returning the key to the supplier. Upon purchase of additional licenses the administrator is provided with a special code number.

To use the code, log into BadgeBuilder® Visitor as the administrator **at the machine where the dongle is installed** and then select the "License" tab. Then enter the provided code and click the Enter button. This button will not become available until a valid code is entered. Once pressed, the indicated license count will change to the new value and the dongle will be updated.

## Secondary Badging Stations

It may be desirable in some installations of BadgeBuilder® Visitor to have more than one reception station. Additional secondary BadgeBuilder® Visitor Security Keys are available which permit BadgeBuilder® to open the BadgeBuilder® Visitor database only, but do not contain a license count.

If there is an existing BadgeBuilder® installation (which comes with its own dongle) this may also be used at secondary badging stations.

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## Program Set Up

Several important steps should be completed before initial use of BadgeBuilder® Visitor.

### Company Information

BadgeBuilder® Visitor requires that the administrator complete the information under the "Program Set Up" tab. Most of this information is company information. This information is automatically sent to BadgeBuilder® for use on badges.

### Administrator's Name

The name of the administrator should be entered so that users can be informed who to ask when they have difficulties using BadgeBuilder® Visitor.

### User Fields

Two user fields in the visitor database are provided. These fields can be used to collect additional information about the visitor. Enter the title of the fields in this dialog.

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## Initially Defined Users

Upon installation the database contains two users (employees) only. One is configured as an administrator and the other as a receptionist. The user names are

**Admin** and **Reception** respectively and the password for both is the word **password**. User names are not case-sensitive, but passwords are.

**Important!** It is vital that the administrator log in and change the passwords for these 2 users immediately upon installation. Select the "Database Maintenance" tab and click the "Employee Database" button. Find the records and make the appropriate changes to names and passwords. Failure to make these changes will severely compromise the security of the BadgeBuilder® Visitor installation.

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## User Types

BadgeBuilder® Visitor allows for three types of users. The operations and information the program presents depends upon the type of user logged in.

### Employee

When an employee signs into BadgeBuilder® Visitor he is automatically designated as an "Employee" type of user. If this is correct no further action is required.

Employees can:

- enter or change their own appointments
- add visitors
- manage their own log-in information

### Reception

There is already one user in the BadgeBuilder® Visitor set up as a receptionist (see Initially Defined Users). To add receptionists, use the Sign In screen to add a new employee. Then log in as the administrator and change the User Type for the just entered employee to "Reception".

Receptionists can:

- enter and change all employees appointments
- sign visitors in and out
- capture visitor information, optionally including photograph
- print visitor badges, parking permits, etc.

### Administrator

There is already one user in the BadgeBuilder® Visitor set up as an administrator (see Initially Defined Users). To add administrators, use the Sign in screen to add a new employee. Then log in as the administrator and change the User Type for the just entered employee to "Administrator".

There can be more than one administrator, but BadgeBuilder® Visitor will prevent an administrator's user type from being changed if there is currently only one administrator registered.

Administrators can:

- manage BadgeBuilder® Visitor databases
- set up the program

- manage licensing
- generate reports
- enter and change all employees appointments
- run BadgeBuilder® (if it is installed)

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## BadgeBuilder®

When BadgeBuilder® Visitor is installed at a Reception Station, it also installs BadgeBuilder® and some initial badge designs. It is possible to augment or change these designs as required.

For full details on how to use BadgeBuilder® please see the on-line help for that program.

### Standard Templates

The BadgeBuilder® visitor file (visitor.idc) already contains several standard templates (badge designs) which are available within BadgeBuilder® Visitor for selection by the receptionist. These are generic visitor badges with different capture spaces as follows:

- Photo
- Photo and fingerprint
- Photo and fingerprint and signature
- Text only
- Parking permit

These templates are all designed for standard credit card sized badges in a horizontal orientation.

An additional template exists called **Multi-photo, signature and fingerprint (letter size)** which is used by BadgeBuilder® as its Dossier Template (see the BadgeBuilder® on-line help for details).

This template contains all the possible capture items (photo, signature, etc.) that it is desired to obtain. It is also formatted to print on a regular paper printer in the form of a visitor dossier.

### Adding or Changing Templates

To add or make changes to templates BadgeBuilder® must be run by the administrator at the reception station. To do this, log in as the administrator and click the BadgeBuilder® button.

All existing badge templates (designs) can be changed. In addition new templates can be added and existing ones deleted. Reviewing the existing templates, in conjunction with the BadgeBuilder® on-line help will be instructive. In addition, running through the BadgeBuilder® tutorial section will be helpful to first-time BadgeBuilder® users.

## ***Special Requirements for the Dossier Template***

The design of the dossier template determines some of the functionality available to the receptionist using BadgeBuilder® Visitor. BadgeBuilder® Visitor is capable of capturing multiple photographs, signatures, scanned documents and fingerprints.

However, the receptionist will only be able to capture those items present in the dossier template. As supplied, the dossier template provides for a single photograph, a signature and a fingerprint.

If the administrator wishes to completely disable fingerprint capture, for example, then removing the fingerprint rectangle from the dossier template will accomplish this.

Similarly, if two photographs per visitor are needed, adding a second photograph rectangle to the dossier template and naming it appropriately will accomplish this.

For this mechanism to work, it is important that the dossier template be set as the dossier template in BadgeBuilder® (see the on-line help for more details).

If a dossier template is not defined in BadgeBuilder® then BadgeBuilder® Visitor will only allow capture of items available on the currently selected badge template.

## **Setting up Capture Devices**

When BadgeBuilder® is used in conjunction with BadgeBuilder® Visitor it uses TWAIN devices to capture photographs or scan documents.

If different TWAIN devices are to be used to capture different items then BadgeBuilder® must be set up correctly. For each photo on the dossier template it is possible to either use the default TWAIN device, or a specifically defined one. Similarly for fingerprint capture a TWAIN device can be used and the specific device defined. For more information see the BadgeBuilder® on-line help.

## **Badging Employees**

The standard BadgeBuilder® Visitor Security Key only permits BadgeBuilder® to open the visitor database. If you desire to use BadgeBuilder® to also create badges for employees then either a special BadgeBuilder® Visitor Security Key must be obtained or a second standard BadgeBuilder® dongle. In either case, additional cost is involved.

# Reports

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## Reports

### Standard Reports

BadgeBuilder® Visitor includes a number of reports which the administrator can access from the **Reports** button.

The reports available are:

- Visitor by Actual Arrival – the report can be filtered by date, employee or visitor name
- Visitor by Actual Arrival – the report can be filtered by date, employee or visitor name
- Visitors Still in the Building – the report can be filtered by date
- Visitor Database
- Employee Database
- Wanted Visitor - the report can be filtered by visitor name

When filtering reports by visitor or employee name, it is possible to filter on an exact or partial name match.

Each report can be reviewed and then printed, or printed directly.

### Fire Roster

The fire roster is a report of all visitors who have been signed in but not signed out. Therefore it represents visitors who are still in the building.

The fire roster can be accessed without requiring the user to be logged in to BadgeBuilder® Visitor. This is to facilitate its easy access in an emergency.

To maintain the accuracy of the fire roster it is important that the receptionist signs out all visitors so that BadgeBuilder® Visitor knows the person has left the building. But realistically this will not always happen.

BadgeBuilder® Visitor provides a way to deal with this issue as detailed below. However, the report indicates the sign in date to help identify those visitors who did not correctly sign out.

### ***Force Visitor Sign Out***

The administrator can automatically "sign out" all visitors signed in prior to today. Such "sign outs" are flagged in the database so that anyone reviewing the record will know that an actual sign out did not occur.

To clear these missing sign outs, log in as the administrator and select the "Database Maintenance" tab and then the "Appointments Database" button. The resulting screen contains a button labeled "Force Visitor Sign Out" along with today's date. **If the date is wrong do not proceed.** Shut down BadgeBuilder® Visitor and set the system clock correctly, and then try again.

When the "Appointments Database" button is clicked all unsigned out visitors will be signed out, as long as they signed in before "today".

It is recommended that the administrator perform this function daily.

# Demonstration

This section is intended for readers who are interested in a demonstration of BadgeBuilder Visitor prior to purchase. It can also help users to become familiar with the various aspects of BadgeBuilder® Visitor.

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## Welcome to the BadgeBuilder Visitor Demonstration

Thank you for your interest in BadgeBuilder® Visitor. You have successfully installed the program and are ready to try it out.

BadgeBuilder® Visitor will work on its own, but is most effective when combined with our BadgeBuilder® identification badge program. If you downloaded BadgeBuilder® Visitor from our web site, please return to [www.badgebuilder.com](http://www.badgebuilder.com) and download a demonstration copy of BadgeBuilder. You can use the same password as we provided for BadgeBuilder® Visitor. The link is <http://www.badgebuilder.com/swlogin.htm?file=BadgeBuilderDemo.exe>. Once BadgeBuilder® is installed you can continue with the full demonstration.

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## Starting the Demonstration

BadgeBuilder® Visitor is intended for 3 different types of users. You can explore each one by using the appropriate log in information. The three types and how to access them are described below.

## Administrator

This type of user is responsible for managing the program and its various databases. The initial log in user name and password for the administrator is **admin** and **password** respectively.

The administrator can perform a variety of tasks and these are more fully explained in the remainder of this manual.

## Receptionist

This user can sign visitors in and out; make and manage appointments; a create visitor badges, including photos if desired. You will need to have installed BadgeBuilder® to be able to view all the receptionist features. Please note that the demonstration of BadgeBuilder® does not allow you to print badges.

To use the initial receptionist account, please use the user name and password of **reception** and **password**.

## Normal

This user type is typically used by employees and allows them to manage their own appointments. A user of this type cannot print badges and does not need to have BadgeBuilder® installed on his/her computer.

You can create a **Normal** account from the **Log In and Sign Up** Wizard by clicking the Sign Up> button. Please note that the demonstration version of BadgeBuilder® Visitor only allows 3 users. Therefore only 1 **Normal** user can be created. You can manage users by logging in as an administrator.

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## Exploring the Wizard Screens

Feel free to explore all the wizard screens for each user type. You will find that BadgeBuilder® Visitor has a wealth of features and capabilities.

You can switch between user types to understand the role each user has, and how the information entered affects each.

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## Some of the ways BadgeBuilder® Visitor can be used

BadgeBuilder® Visitor is a versatile visitor management program which can be used in various ways, depending upon individual requirements. Some these ways are described here. For all but the **Simple Reception Station**, all computers running BadgeBuilder® Visitor must be connected via a Windows Local Area Network.

### Simple Reception Station

A single installation of BadgeBuilder® Visitor and BadgeBuilder® at a receptionist's desk will allow the receptionist or administrator to:

- Enter appointments on employees' behalf
- Sign visitors in and out
- Issue visitor badges

- Create employee badges
- Create reports

## Reception and Employee Stations

With BadgeBuilder® Visitor and BadgeBuilder® installed at the reception's station, plus BadgeBuilder® Visitor at each employee's desk, employees can manage their own appointments, and the receptionist can sign visitors on and out as needed.

The receptionist can also perform all operations as for a **Simple Reception Station**.

An administrator can log in at any employee location, or at the reception desk, to administer the program.

## Multiple Receptionist, Administrator and Employee Stations

BadgeBuilder® Visitor and BadgeBuilder® can be installed at multiple reception stations, each sharing a common database. This common database can be located on a central Windows file server. Visitors can be logged in at one station and out at another.

The administrator can have his/her own installation of BadgeBuilder® Visitor, and if BadgeBuilder® is also included at this location, full BadgeBuilder® Visitor and BadgeBuilder® operations will be available.

Each employee with a copy of BadgeBuilder® Visitor will be able to manage his/her appointments and personal information. BadgeBuilder® Visitor can be configured to email the employee when a visitor is signed in at reception.

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## Thank You

We appreciate the time you have spent evaluation BadgeBuilder® Visitor. It is a sophisticated program built upon our tried and proven BadgeBuilder® Identification Badge program.

If you have questions which were not answered by this demonstration, please contact your local BadgeBuilder® dealer, of us directly at 800-487-6371 (US only) or +1-508-476-9200.



# Glossary of Terms

## **Badge Template**

A design for a badge in BadgeBuilder®

## **BadgeBuilder®**

A proprietary program for the maintenance of ID Badge information and the generation of ID badges

## **BadgeBuilder® Visitor**

A proprietary program from managing visitors to a company and preparing visitor badges

## **CDROM**

Compact Disc Read Only Memory - a laser disc used for storage of digital information

## **Directory**

A grouping of files on a computer - synonymous with folder

## **Dongle**

A hardware device attached to a computer to regulate software usage and ensure adherence to licensing requirements

## **Fire Roster**

A special report intended to help fire fighters determine building occupancy.

## **Folder**

A grouping of files on a computer - synonymous with directory

## **Installation Wizard**

A software program designed to guide the user through a process in a step-by-step manner

## **PC**

Personal Computer - specifically and IBM PC

## **RAM**

Random Access Memory

## **Security Key**

A hardware device attached to a computer to regulate software usage and ensure adherence to licensing requirements

## **Server**

A computer configured to store and provide information for other computers on the network

## **TWAIN**

A standard software interface that allows programs to obtain images from a wide range of image-oriented hardware devices including scanners and cameras.

## **UNC**

Universal Naming Convention - a means of precisely defining a folder over the network without using drive letters. UNC names start with \\

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## **W**

Welcome to the BadgeBuilder Visitor Demonstration

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