



# PassagePoint Global User's Manual

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## Chapter 1 – Introduction and Starting PassagePoint Global

### WHAT IS PASSAGEPOINT GLOBAL?

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.

### USES FOR THE SOFTWARE

- For signing in and badging visitors - walk-in, pre-registered and authorized
- To pre-register individuals and groups
- For checking visitor names against U.S. sex offender lists
- As a people tracking tool
- To notify visitors and hosts of pre-registrations and arrivals
- For viewing and printing visit reports

### SUPPORTED HARDWARE

Below is a short description of the hardware devices that may be used with PassagePoint. Many of the supported device require USB 2.0 ports. For a full description on how to configure these devices within PassagePoint, see the chapter on Station Preferences and Devices.

#### Badge Printer

Practically 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, do not require ink and quickly print one badge at a time. The printer commonly used with PassagePoint is Dymo's Label Writer 450 Turbo.

#### Business Card, ID/License & Passport Scanners

The Card Scanning Solutions (CSSN) hardware works with PassagePoint to scan business cards, driver's licenses, ID cards and passports. The data and photo captured from a scan is automatically entered into the current visit record. Currently, PassagePoint works with the ScanShell 800, 800N, 1000, ScanShell 900DX, and SnapShell models. USB 2.0 ports are required for these devices to be accessible. Please refer to the CSSN documentation for questions about specific requirements.

### Photo Capture Devices

PassagePoint can capture photos using a TWAIN or WIA driver for an USB 2.0 web camera. Various web cameras will work with PassagePoint, including Logitech QuickCam line of cameras.

### Barcode Scanners

Barcodes printed on badges or sent via Email may be used to sign in/out people. When a barcode is scanned, PassagePoint can either open a tab containing that person's visit or automatically sign in/out that person.

### Signature Capture Devices

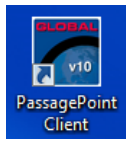
Agreements that people need to agree to can be signed electronically with a Topaz signature capture device. The Signature is captured and displayed on the agreement window when using the SignatureGem 1x5 model. The Topaz 4x5 model has the added ability of showing the agreements on the screen of the signature pad device.

### Biometric Fingerprint Scanners

When identifying a person, a fingerprint scanner can be used to access a person's current visit record or link to their previously record person data. A new person can be enrolled into the fingerprint device database and used later for sign-out or starting a new return visit. Currently, the M2-Hamster device from M2Sys is supported.

## OPERATING PASSAGEPOINT GLOBAL

### Starting PassagePoint Global



To start PassagePoint Global, either double click on the PassagePoint Global icon on your desktop or select **Start** from the Windows task bar and choose **All Programs – PassagePoint Global V10 – PassagePoint Client**.

### Login to PassagePoint Global

When PassagePoint Global is launched, a login screen appears which allows users to specify their login name and password. Both fields are case sensitive.

### Login Screen



Enter the Login Name and Password given to you by your PassagePoint System Administrator.



If you fail to login after a specified number of attempts, or if your account has expired, the User Account will become disabled. Once disabled, your PassagePoint System Administrator will need to reactivate the account.

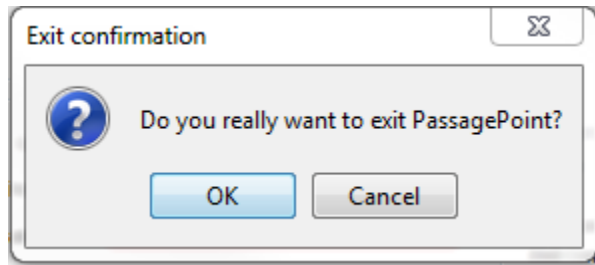
A Login requires that a PassagePoint Client license is available. Client licenses are shared based on concurrent client connections.

### Change Password for PassagePoint Global

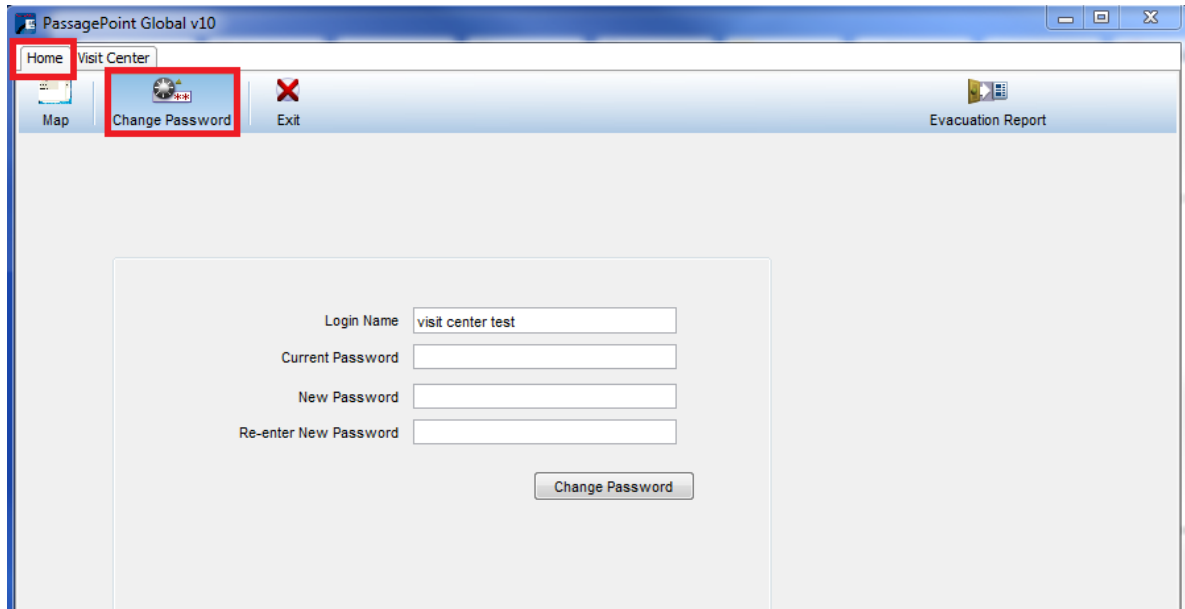
To change your PassagePoint Global password, select the Home tab and then Change Password. Fill in your Login Name and Current Password and desired New Password and then the Change Password button.

### Exiting from PassagePoint Global

To Logout of PassagePoint Global choose the X  icon from the top right side of the screen or from the Home tab select Exit.  The Exit Confirmation Screen appears.



Select Ok to continue to exit or Cancel if you do not want to exit the program.



### Starting PassagePoint Global in Self-Registration Mode

When PassagePoint Global is launched, a login screen appears which allows users to specify their login name and password. Both fields are case sensitive.

### Login Screen



Enter the Login Name and Password for the Kiosk mode. PassagePoint Global starts in Kiosk mode:



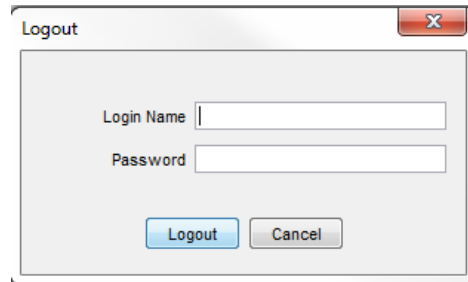
**GLOBAL v10**



### Exiting PassagePoint Global Self-Registration Mode

To exit PassagePoint Global from Kiosk mode, select the Alt and F4 keys together.

In the Logout box enter the Login Name and Password for the Kiosk and select the Logout button.





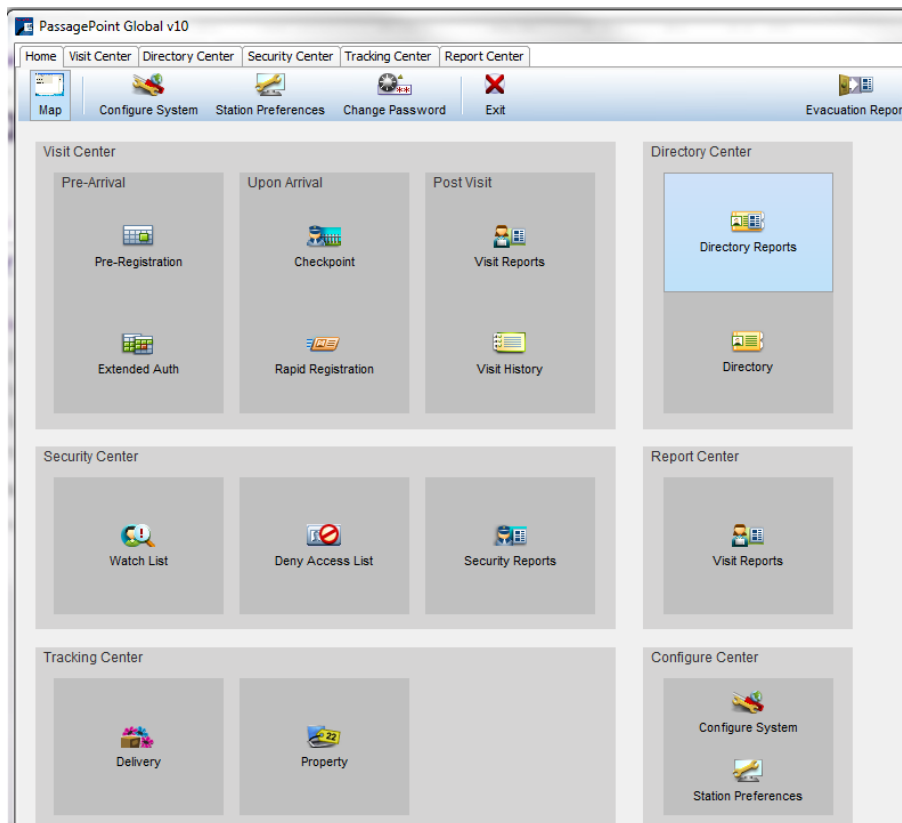
# Chapter 2

## Chapter 2 – Navigating PassagePoint Global

PassagePoint Global is organized by Centers: Home, Visit, Directory, Security, Tracking, and Report. In each center is a Ribbon. The Ribbon changes depending on which area of the Center is selected.

**Note:** You may not see all Centers or features depending on your Log in.

**Home** - displays a map of the centers including the Configure Center (if your log in allows) where you can customize the program– by user, by category, set up policies, etc.



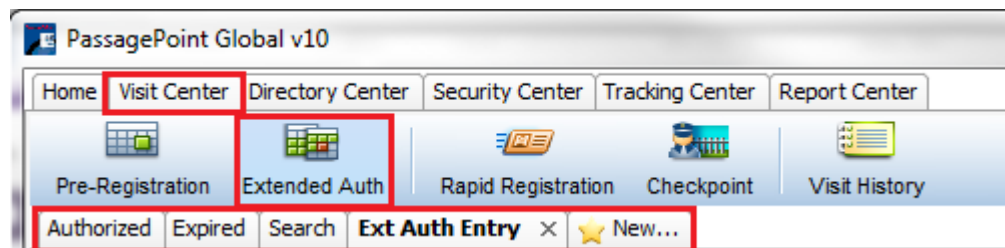
**Visit Center** - where you manage visits: check visitors in/out, pre-register, authorize, checkpoint, and view history.

**Pre-registration** - intended for short-term visits by visitors with specific arrival dates and times. For example, a job interviewee, a guest speaker, and parents attending a parent/teacher conference. The visitor's name appears on the pending list the day(s) the visitor is expected to visit. If the visitor fails to appear on the scheduled date, the record is marked as a "No Show."



- **Today's Pre-Reg** – This tabbed page lists visitors authorized to visit your facility on the current date.
- **Tomorrow's Pre-Reg** - This tabbed page lists visitors authorized to visit your facility the day after the current date.
- **Search** - This tabbed page allows you to search all pre-registered visitors, current or historical, based on user-specified criteria.
- **Pre-Reg Entry** - This tabbed page allows you to create a new pre-registered visitor.
- **New** - This is a button that creates a new Pre-Reg Entry tabbed page every time you click it.

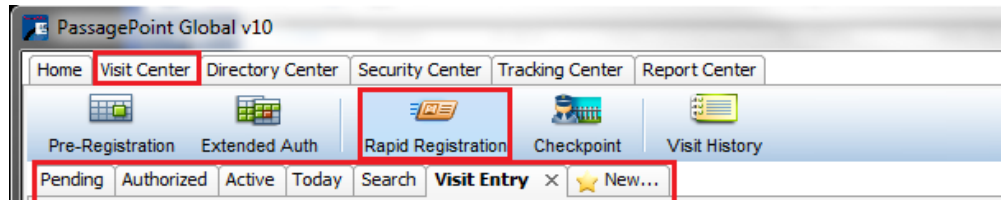
**Extended Authorization** - intended for repeat visitors for whom arrival dates are open-ended and usually frequent. These visitors are typically well-known to your staff, for example a copier repair person, vending machine person, or parent volunteer. The visitor's name appears on the authorized list every day until the authorization expires



- **Authorized** - This tabbed page lists visitors currently authorized to visit your facility, whose expiration date has not passed.
- **Expired** - This tabbed page lists visitors previously authorized to visit your facility but the expiration date has passed.

- Search - This tabbed page allows you to search all extended authorization visitors, current or historical, based on user-specified criteria.
- Ext Auth Entry - This tabbed page allows you to create a new extended authorization visitor.
- New - This is a button that creates a new Ext. Auth Entry tabbed page every time you click it

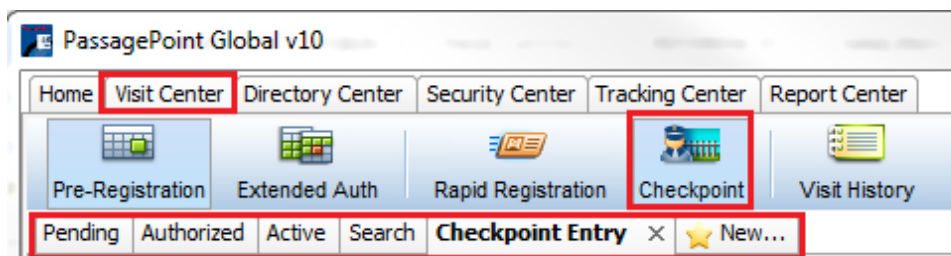
## Rapid Registration



- **Pending** - This tabbed page lists visitors registered through the Pre-Registration process and scheduled for a visit on the current date.
- **Authorized** - This tabbed page lists visitors registered through the Extended Authorization process who are allowed to visit on the current date.
- **Active** - This tabbed page lists visitors currently signed in to the system.
- **Today** - This tabbed page lists all visitors who signed in or signed out of your system on today's date.
- **Search** - This tabbed page allows you to search all all visitor and directory names, current or historical, based on user-specified criteria.
- **Visit Entry** - This tabbed page allows you to create a new visitor record, if the visitor is not registered in advance.
- **New** - This button creates a new Visit Entry tabbed page every time you click it.

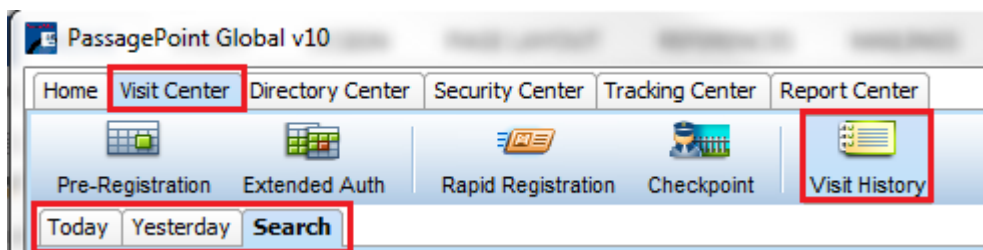
**Checkpoint** – record that a specific visitor passed a security point. This option is commonly used at stop points, for example a guard house at the entrance to a parking lot.

A visitor not yet signed-in to the system must still sign-in using the Rapid Registration option.



- **Pending** - This tabbed page lists visitors registered through the Pre-Registration process and scheduled for a visit on the current date.
- **Authorized** - This tabbed page lists visitors registered through the Extended Authorization process who are authorized to visit on the current date.
- **Active** - This tabbed page lists visitors currently signed in to the system.
- **Search** - This tabbed page allows you to search all visitor and directory names, current or historical, based on user-specified criteria.
- **Checkpoint Entry** - This tabbed page allows you to create a new checkpoint entry visitor record.
- **New** - This button creates a new Checkpoint Visit Entry tabbed page every time you click it.

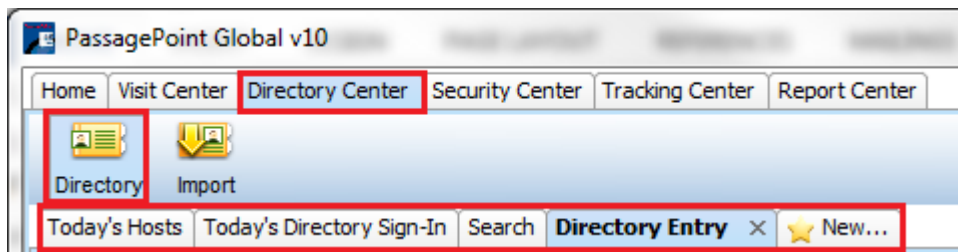
**Visit History** – shows the visits for today and yesterday and you can search all visits.



- **Today** - This tabbed page lists all visitors who signed in or signed out of your system today.
- **Yesterday** - This tabbed page lists all visitors who signed in or signed out of your system yesterday.
- **Search** - This tabbed page allows you to search all visitor and directory names, current or historical, based on user-specified criteria.

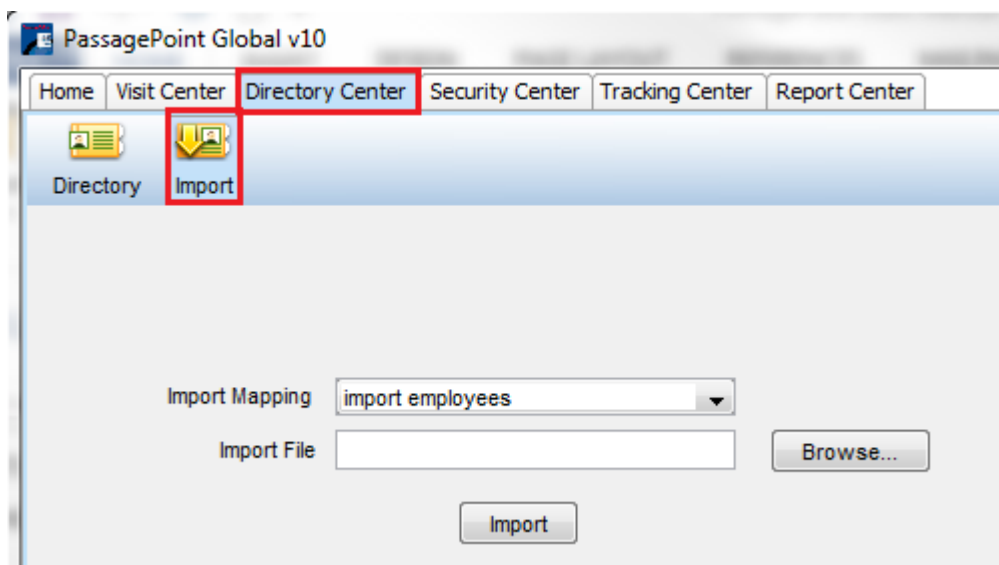
**Directory Center** - stores records for people who are part of your organization and typically are in your facility, for example employees, contractors, and students. The Directory Center is especially useful when looking up employee names and phone numbers.

**Directory** - stores records for people who are part of your organization and typically are in your facility, for example employees, contractors, and students. The Directory Center is especially useful when looking up employee names and phone numbers.



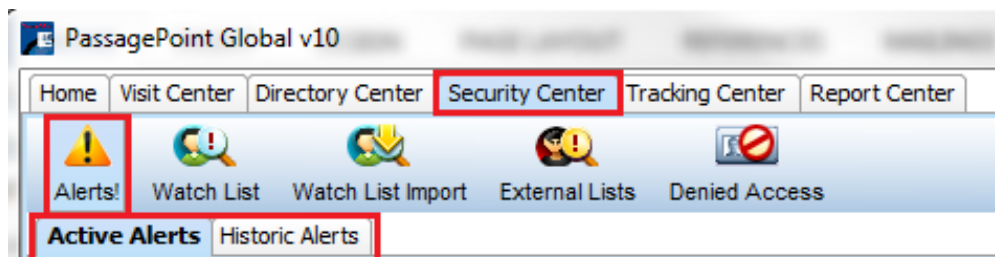
- **Today's Hosts** - This tabbed page lists all the directory names of those people who are hosting visitors today.
- **Today's Directory Sign-In** - This tabbed page lists all the directory names of those people who signed in or signed out of your system today.
- **Search** - This tabbed page allows you to search all directory names, current or historical, based on user-specified criteria. To view all matches you have the option of including inactive and/or manual entries, as well as active and imported entries.
- **Directory Entry** - This tabbed page allows you to create a new Directory Entry tabbed page every time you click it.

**Import** – import pre-existing data from another source.



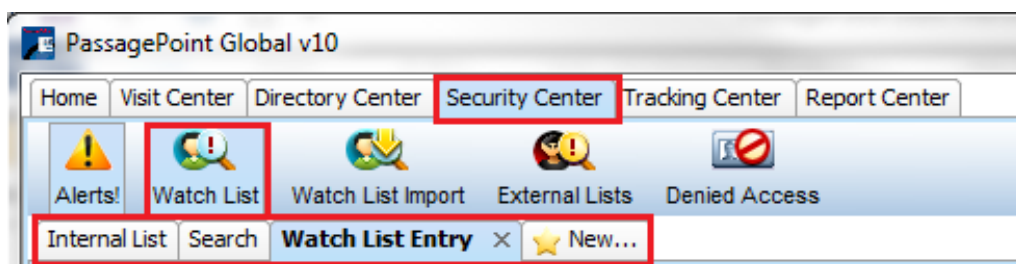
**Security Center** - creates lists of names of people who may require special attention or special actions. For example, you should create a watch list entry for an individual you do not want to admit to your facility. You can include a message indicating the reason they should not be admitted.

**Alerts!** – shows matches to internal and external watch lists.



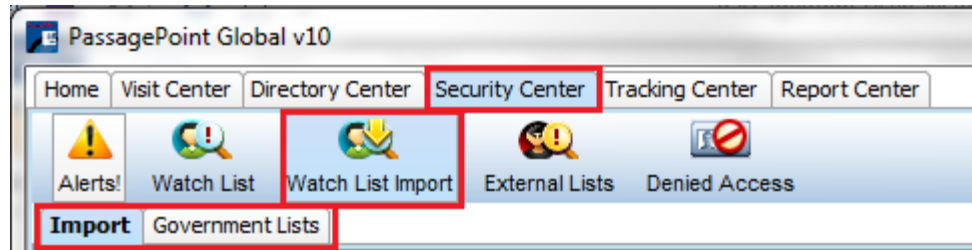
- **Active Alerts** – shows active alerts.
- **Historic Alerts** – shows alerts moved from Active to Historic.

**Watch List** – shows matches to internal and external watch lists.



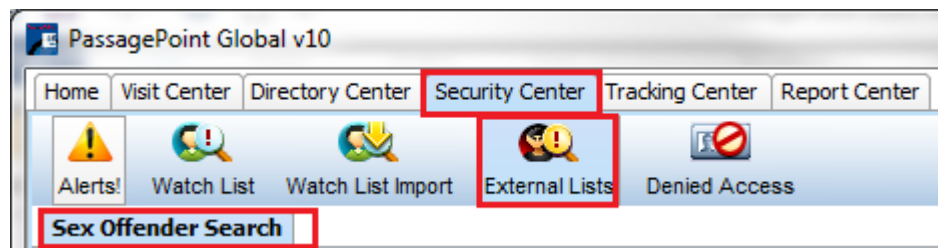
- **Internal List** - This tabbed page lists the names of people currently on your internal watch list.
- **Search** - This tabbed page allows you to search all names of people currently on your organization's watch list, based on user-specified criteria.
- **Watch List Entry** - This tabbed page allows you to create a new watch list entry.
- **New** - This is a button that creates a new Watch List Entry tabbed page every time you click it.

**Watch List Import**– shows matches

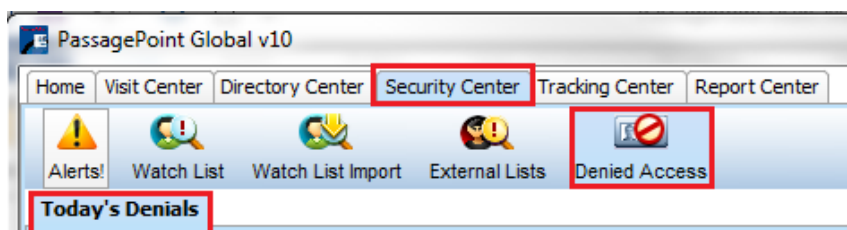


- **Import** – import a watch list from another source.
- **Government Lists** – import the online US Government watch lists for Specially Designated Nationals and Denied Persons.

**External Lists** – if you have a valid subscription, you can search US sex offenders and US government denied party databases.

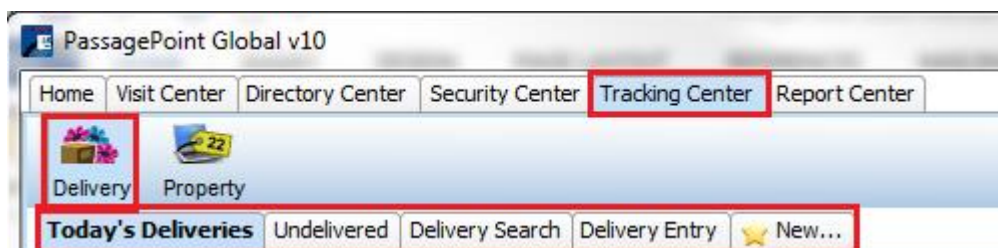


**Denied Access** – shows visitors who have been denied access to the facility.



**Tracking Center** - track deliveries and company owned or personally owned property that is loaned out or brought into the facility.

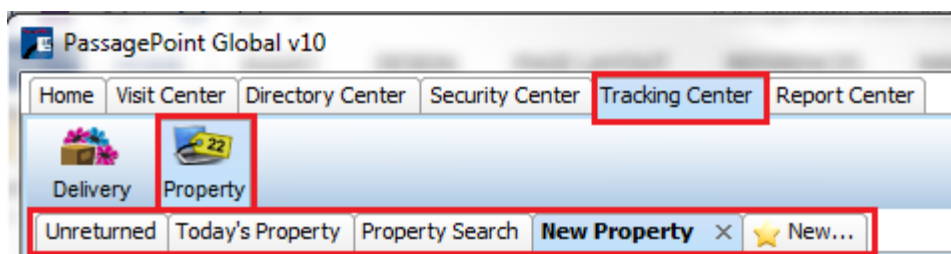
**Delivery** –





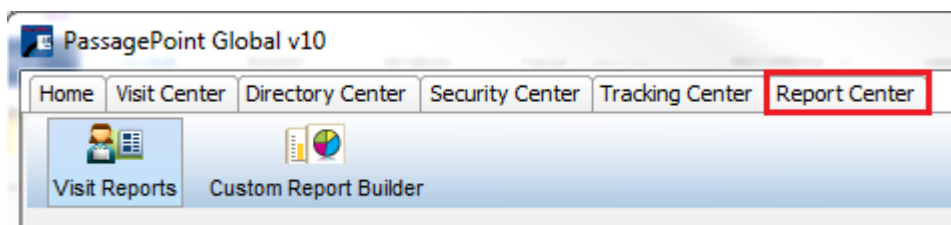
- **Today's Deliveries** - This tabbed page lists the all the deliveries for today.
- **Undelivered** - This tabbed page lists all the deliveries that have been undelivered to the final destination.
- **Delivery Search** - This tabbed page allows you to search all the deliveries, based on user-specified criteria.
- **Delivery Entry** - This tabbed page allows you to create a new delivery entry.
- **New** - This is a button that creates a new Delivery Entry tabbed page every time you click it.

### Property –



- **Unreturned** - This tabbed page lists all the deliveries that have been undelivered to the final destination.
- **Today's Property** - This tabbed page lists the all the property loans/brought it the facility for today.
- **Property Search** - This tabbed page allows you to search all the Property loans/brought into facility, based on user-specified criteria.
- **New Property**- This tabbed page allows you to create a new property entry.
- **New** - This is a button that creates a new Delivery Entry tabbed page every time you click it.

**Report Center** – contains over 30 canned reports and a custom report builder to create any report needed from the system.





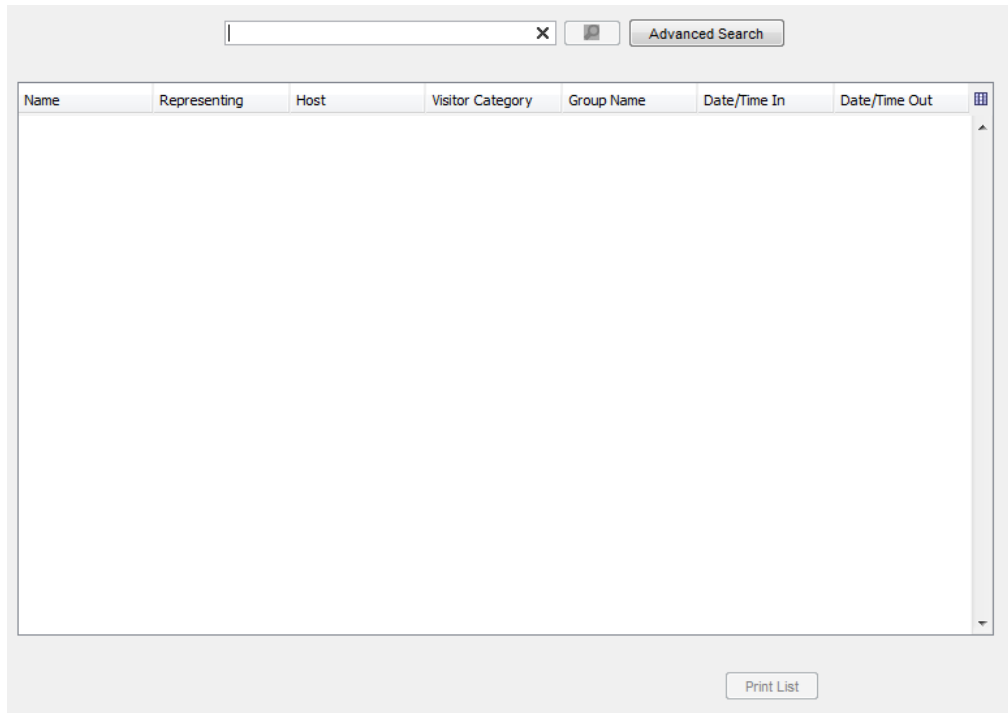
## Finding a Visitor - Search

All of the centers in PassagePoint software include a Search tab to help locate records. You can search for visitors by entering part of the visitor's first or last name or part of the host's first or last name.

**Note:** If you conducted a previous search, those results continue to display on the Search page until you close the PassagePoint software or until you conduct another search. Follow the steps below to refresh the list of names

To Search for a name:

1. Select the "Search" tab in any center. The Search tabbed page displays.



Name	Representing	Host	Visitor Category	Group Name	Date/Time In	Date/Time Out
------	--------------	------	------------------	------------	--------------	---------------

2. Enter text in the Search field if you want to find records that contain specific text in the First Name or Last Name fields of any visitor or directory records. You must enter at least two characters to do a search.
3. Select the Search button. A list of names matching the search criteria displays.

ch X [Advanced Search]


Name	Representing	Host	Source	Visitor Category	Group Name
Chase, Karen			Host	Temp Employee	
CHASE, KAREN		Austin, Denise	Historic	Visitor	
CHASE, KAREN	Stopware	Sommers, Jaime	Pre-Reg	Visitor	
CHASE, KAREN		Austin, Denise	Historic	Visitor	
Chase, Karen		Austin, Steve	Pre-Reg	Contractor	
Chang, Halle		Kobayashi, Paris	Host	Contractor	
Chin, Armadeus		Duff, Eric	Host	Temp Employee	
Chase, Lucy		Zarrow, Karen	Pre-Reg	Visitor	
Checkpoint, Tst			Historic	Visitor	
Chanoff, Jackie			Pending	Visitor	
Baez, Chad			Host	Temp Employee	
CHASE, MAREN		Austin, Steve	Historic	Visitor	
Chase, Lucy		Zarrow, Karen	Pre-Reg	Contractor	

Results Returned 13 Print List

4. Select the desired name. Additional information about the record displays.

ch X [Advanced Search]

Name	Representing	Host	Source	Visitor Category	Group Name
Chase, Karen			Host	Temp Employee	
CHASE, KAREN		Austin, Denise	Historic	Visitor	
CHASE, KAREN	Stopware	Sommers, Jaime	Pre-Reg	Visitor	
CHASE, KAREN		Austin, Denise	Historic	Visitor	
Chase, Karen		Austin, Steve	Pre-Reg	Contractor	
Chang, Halle		Kobayashi, Paris	Host	Contractor	
Chin, Armadeus		Duff, Eric	Host	Temp Employee	
Chase, Lucy		Zarrow, Karen	Pre-Reg	Visitor	
Checkpoint, Tst			Historic	Visitor	
Chanoff, Jackie			Pending	Visitor	
Baez, Chad			Host	Temp Employee	
CHASE, MAREN		Austin, Steve	Historic	Visitor	



MAREN CHASE

**Contact Information**

Phone:

E-mail:

Work Group:

Area:

Register a New Visit

**Status**

Last Visit: Sep 28, 2015 01:19 PM

Purpose of Visit:

Destination: Host Office

View Historic Record Clone Visit

Chase, Lucy      Zarrow, Karen      Pre-Reg      Contractor

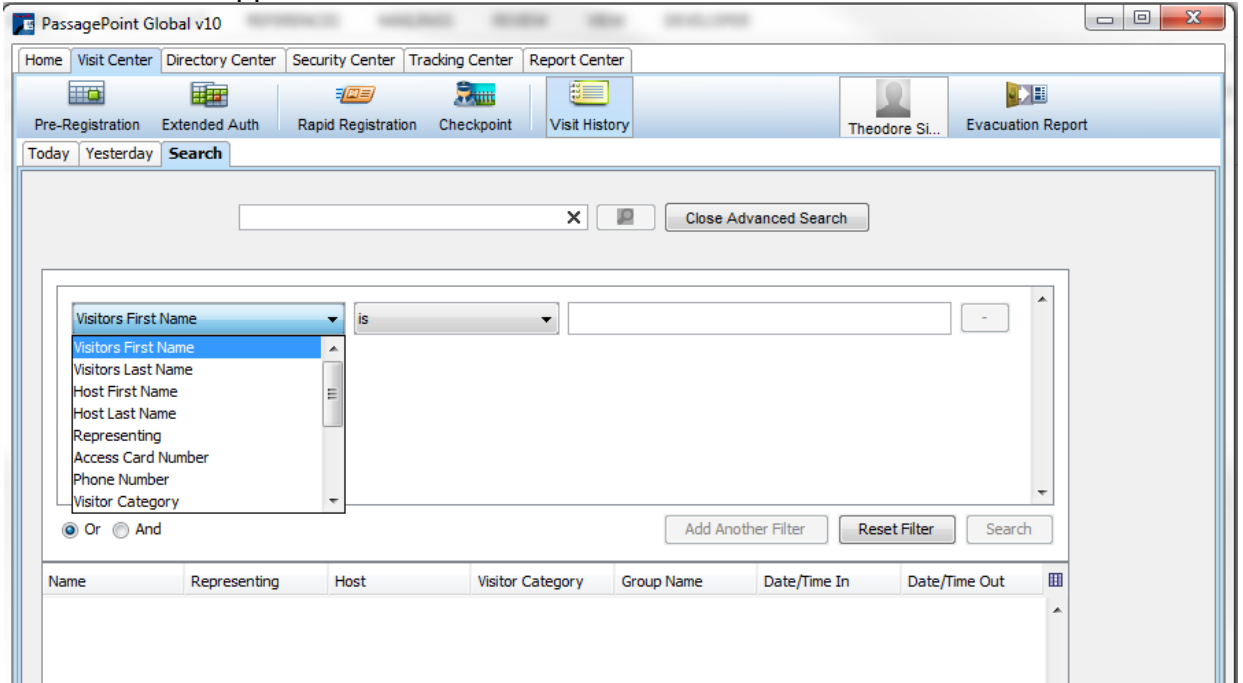
Results Returned 13 Print Badge Print List

### Advanced Search

The Advanced Search allows you to search on specific items such as, name, category, group, dates, and destination.

To do an Advanced Search:

1. From the Search screen, select the Advanced Search button. The Advanced Search screen appears.



2. Select a filter from the drop down list. The choices are:

- Visitor First Name
- Visitor Last Name
- Host First Name
- Host Last Name
- Representing
- Access Card Number
- Phone Number
- Visitor Category
- Group Name
- Email
- Mobile Phone Number
- Start Date
- End Date
- Desintation
- Unique #

3. Select an operator. The choices are:

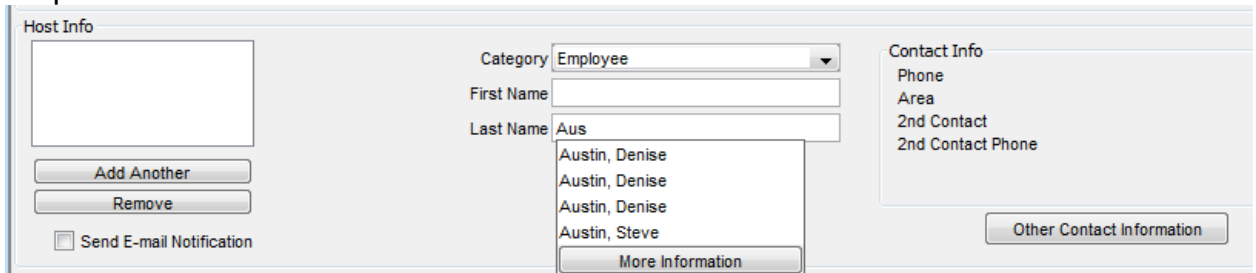
- Is
- Isn't
- Begins with

- Ends with
  - Contains
4. Add additional filters by selecting the Add Another Filter button. Be sure to choose the desired radio button of Or or And to indicate if all filters are true (And) or if any are true (Or).
  5. Select the Search button to see search results. Select the desired name. Additional information about the record displays
  6. Select the Close Advanced Search button to return to the simple Search.

## Using Intellihint

Intellihint is a built in feature that allows you to enter the first three characters and atomically shows all the matches for those characters. Sometimes this is also known as Type Ahead.

1. If Intellihint is enabled, when you type the first and last name or the first few letters of the last name (depending on the settings), all matches are presented.



The screenshot shows a search interface with the following elements:

- Host Info:** A large empty text area with buttons for "Add Another" and "Remove", and a checkbox for "Send E-mail Notification".
- Category:** A dropdown menu currently set to "Employee".
- First Name:** An empty text input field.
- Last Name:** A text input field containing "Aus", with a dropdown list of suggestions: "Austin, Denise", "Austin, Denise", "Austin, Denise", and "Austin, Steve". A "More Information" button is located below the suggestions.
- Contact Info:** A panel on the right with fields for "Phone", "Area", "2nd Contact", and "2nd Contact Phone", and an "Other Contact Information" button.

2. Choose from the list or click on the screen and continue typing.

## Chapter 3 – Visitor Management and Badging

Many companies and organizations prefer to register visitors and groups before they arrive onsite at the facility. This option is especially helpful for corporate events, group meetings, and tours. Advanced registration makes the sign-in process much faster and less taxing for both visitors and front desk personnel. You can choose to print visitor badges when you register the visitor or print badges as visitors arrive.

The flexibility of PassagePoint™ software gives you two options for advanced registration: Pre-Registration and Extended Authorization. A visitor may not registered in advance, also known as a “walk-in”, in which case you can add the visitor via Rapid Registration.

### Pre-Registration

Pre-Registration is intended for short-term visits by visitors with specific arrival dates and times. Examples of this type of visitor include a job interviewee, a guest speaker, and parents attending a parent/teacher conference. The visitor's name appears on the pending list the day(s) the visitor is expected to visit. If the visitor fails to appear on the scheduled date, the record is marked as a "No Show."

### Extended Authorization

Extended Authorization is intended for repeat visitors for whom arrival dates are open-ended and usually frequent. These visitors are typically well-known to your staff, for example a copier repair person, vending machine person, or parent volunteer. The visitor's name appears on the authorized list every day until the authorization expires.

Group registration is also easy using Pre-Registration or Extended Authorization.

Although Pre-Registration visitors can be registered for extended periods of time, the names show up on the Pending tabbed page day after day. You may find it more useful to register such visitors using the Extended Authorization feature to cut down on the size of the pending list, so it is easier to find the less frequent visitor names.

Records created in the Visitor Center appear on Evacuation Reports since they are considered visitors, regardless of the category assigned to them when the record is created.

## Rapid Registration

Rapid Registration is where you process visitors when they arrive for the visit. If the visitor is not registered in advance, Rapid Registration can be used to add a visitor to your PassagePoint™ system. These visitors are also called “walk-ins”.

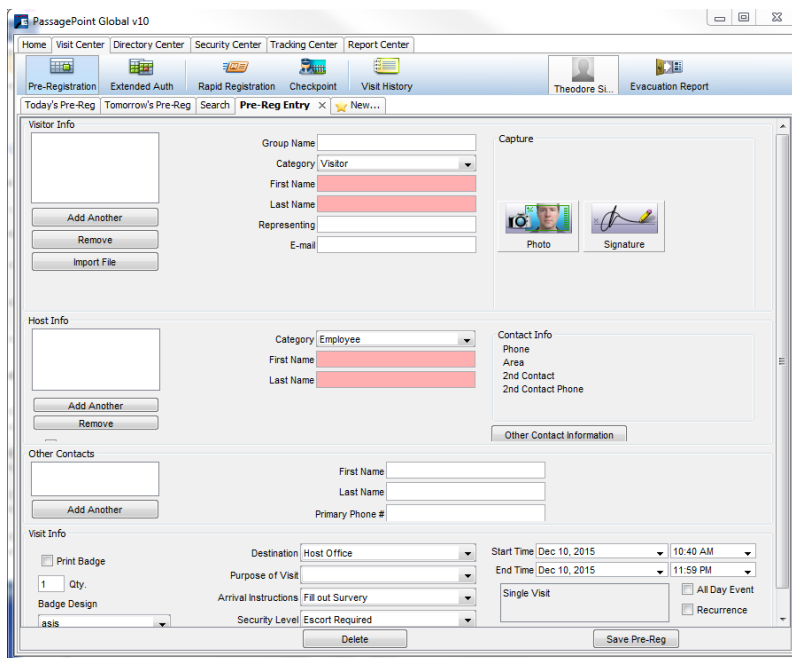
## Pre-Registering Visitors

Pre-registered visitors, sometimes referred to as Pending visitors, are people you expect to arrive at specific times and dates. A person visiting for the purpose of a job interview is an example of a visitor whose arrival date and time are usually known in advance. A visitor registered using the Pre-Registration feature is automatically marked as a "No Show" if they do not arrive on the designated date.

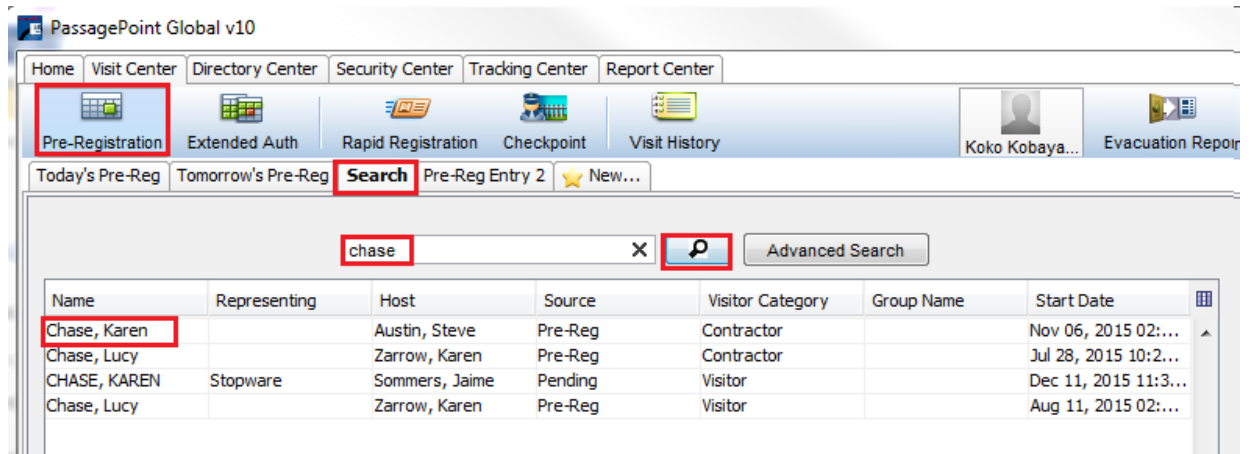
When a visitor is pre-registered, the information is stored in PassagePoint. The day before the arrival date, the visitor's name appears on the "Tomorrow Pre-Reg" tabbed page. On the arrival date the visitor's name appears on the "Today" tabbed page. The visitor's name also appears on the "Pending" tabbed page in the Rapid Registration section. If the visitor does not sign in before the visit time expires, their status automatically changes to “No Show” and PassagePoint software removes their name from the pending list.

To Pre-Register a visitor:

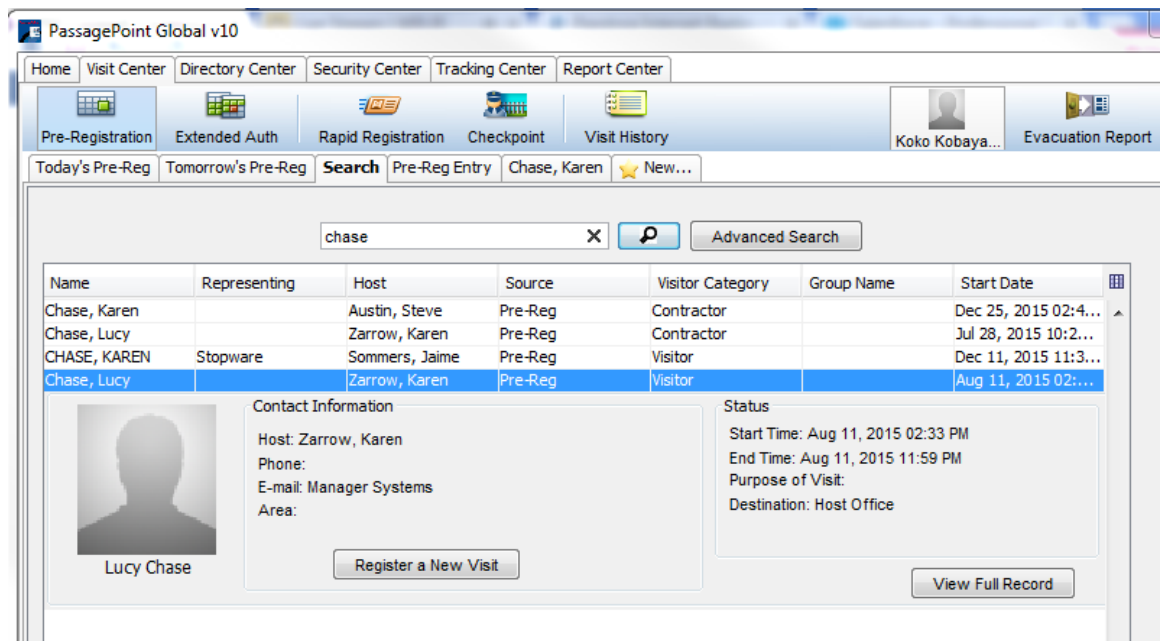
1. From the Visit Center select "Pre-Registration" and the Pre-Reg Entry tab. The Pre-Registration screen displays.



2. There are two options:
  - If the person has previously been a visitor to your facility, use Search on the Ribbon to find a previous visit.



1. Enter a Name to search on and select the search icon. The matching results display. Select the name to display the visit information.
2. Select "Register a New Visit" to create a new pre-registration for the visitor.



If the person does not have a visitor record, click the "Pre-Reg Entry" tab to create a new visitor record.

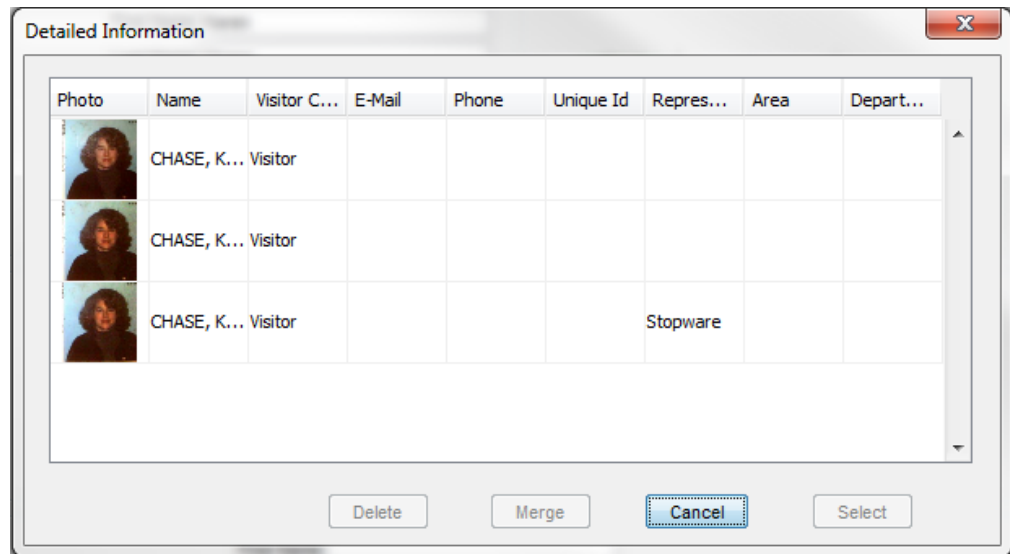
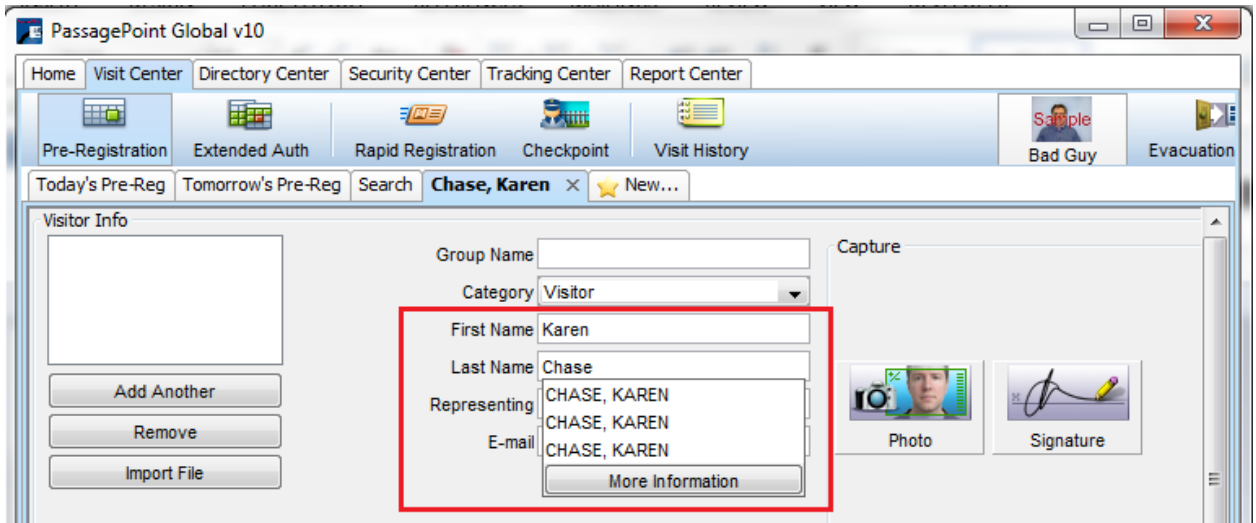
The screenshot displays the 'PassagePoint Global v10' application window. The main menu includes Home, Visit Center, Directory Center, Security Center, Tracking Center, and Report Center. Below the menu are icons for Pre-Registration, Extended Auth, Rapid Registration, Checkpoint, and Visit History. The current view is 'Pre-Reg Entry' under 'Today's Pre-Reg'. The form is organized into four main sections:

- Visitor Info:** Contains a large empty box on the left with 'Add Another', 'Remove', and 'Import File' buttons. To the right are input fields for Group Name, Category (set to 'Visitor'), First Name (pink background), Last Name (pink background), Representing, and E-mail.
- Host Info:** Similar to Visitor Info, with a large empty box and 'Add Another'/'Remove' buttons. Fields include Category (set to 'Employee'), First Name (pink background), and Last Name (pink background).
- Other Contacts:** Includes a large empty box and 'Add Another' button. Fields for First Name, Last Name, and Primary Phone #.
- Visit Info:** Contains a 'Print Badge' checkbox, 'Qty.' (set to 1), and 'Badge Design' (set to 'asis'). Fields include Destination (Host Office), Purpose of Visit (Fill out Survey), Arrival Instructions (Fill out Survey), Security Level (Escort Required), Start Time (Dec 10, 2015 10:40 AM), End Time (Dec 10, 2015 11:59 PM), and visit type (Single Visit). There are checkboxes for 'All Day Event' and 'Recurrence'.

Buttons at the bottom include 'Delete' and 'Save Pre-Reg'.

3. In the Visitor Info section, enter all necessary information. Required fields have a pink background. When entering the visitor's name, if the Intellihint feature is enabled, existing visitor visits with the same name display. You can select the More Information button to see information about the visitor, including a picture. You can then determine if the existing visitor record is for the same visitor.





In the Detailed Information screen above, this is the same visitor with three visits. You can select one of the visits and the Select button to create a Pre-registration with the existing information. If the visitor is not one of the exiting presented, select the Cancel button and continue entering visitor information.

4. Enter the Host name. If Intellihint is enabled, when you type the first and last name or the first few letters of the last name (depending on the settings), all matches are presented.

Host Info

Category: Employee

First Name:

Last Name: Aus

- Austin, Denise
- Austin, Denise
- Austin, Denise
- Austin, Steve

More Information

Contact Info

Phone

Area

2nd Contact

2nd Contact Phone

Other Contact Information

Send E-mail Notification

Add Another

Remove

Choose from the list or click on the screen and continue typing.

5. If there are more than one host for the visit, select Add Another and enter the additional host.
6. Select the Send E-mail Notification check box to send an email to the host confirming the pre-registration.
7. If applicable, enter Other Contacts. An example of an Other Contact, maybe the escort for the visitor. The escort would bring the visitor to the host.
8. Enter information about the visit.

**Print Badge** – check the box to print a badge for the pre-reg when saved

**Note:** You can print the badge later or when the visitor arrives.

**Qty.** – enter the number of badges to print

**Badge Design** – choose the badge to print

**Destination** – choose the visit destination from the drop down list

**Purpose of Visit** – choose the reason for the visit from the drop down list

**Arrival Instructions** – choose the arrival instructions from the drop down list

**Security Level** – choose the security level from the drop down list

**Special Instructions** – enter any instructions, for example, “Call my cell phone when visitor arrives”

**Start Time** – choose the date and time from the calendar and time pop up from the drop down arrow. Date and time default to the current date and time.

**End Time** - choose the date and time from the calendar and time pop up from the drop down arrow. Date and time default to the current date and 11:59pm.

**All Day Event** – check the box if this visit will last for the entire day.

**Recurrence** – check the box if this visit will repeat. The Recurrence screen displays. From here, you can select the Appointment Time, the Recurrence Pattern and the Range of Recurrence. Select the desired information and the OK button. The Recurrence information displays in the box where previously it said “Single Visit”.

9. Select the Save Pre-Reg button.

### Extended Authorization

Extended authorization visitors, sometimes referred to as Authorized visitors, are people with open-ended arrival times over extended time periods. A vending machine service person is an example of a visitor you may want to register using the Extended Authorization window. Since arrival dates and times may vary, extended authorization visitors are not marked as "No Shows" if they do not arrive on a specific date.

When a visitor is given extended authorization, the visitor's name appears on the "Authorized" tabbed page in both the Extended Auth and the Rapid Registration sections. The name appears every day for which the visit is authorized. When the authorization time expires, the name is removed from all "Authorized" tabbed pages and is placed on the "Expired" tabbed page in the Extended Auth section.

To add an Extended Authorization Visitor:

3. From the Visit Center select "Extended Auth" and the Ext Auth Entry tab. The Extended Authorization screen displays.

PassagePoint Global v10

Home Visit Center Directory Center Security Center Tracking Center Report Center

Pre-Registration Extended Auth Rapid Registration Checkpoint Visit History Jackie Chanoff Evacuation Report

Authorized Expired Search Ext Auth Entry X New...

**Visitor Info**

Group Name

Category

First Name

Last Name

Representing

E-mail

Add Another Remove Import File

**Host Info**

Category

First Name

Last Name

Send E-mail Notification

Other Contact Information

**Other Contacts**

First Name

Last Name

Primary Phone #

Add Another Remove

**Visit Info**

Print Badge

Qty.

Badge Design

Destination

Purpose of Visit

Arrival Instructions

Security Level

Special Instructions

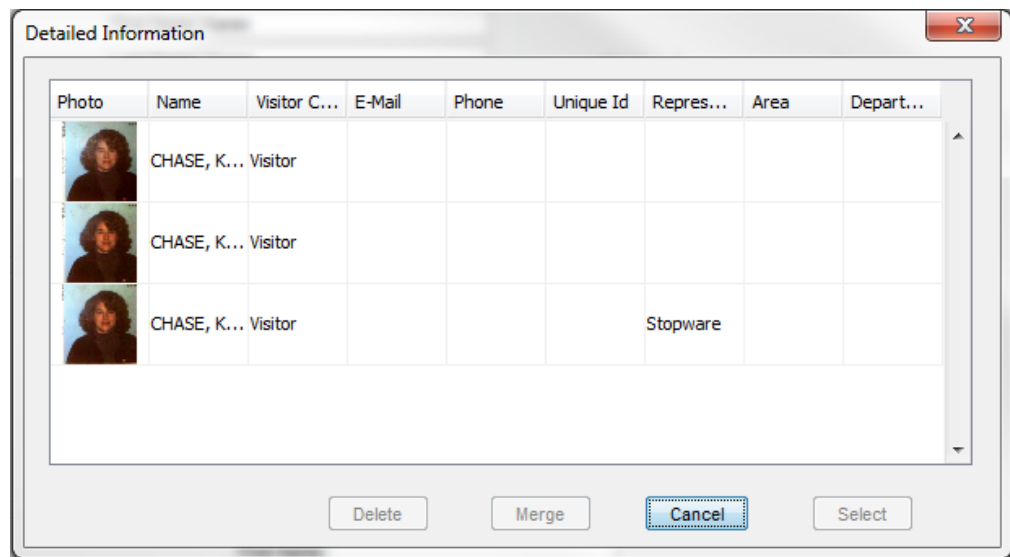
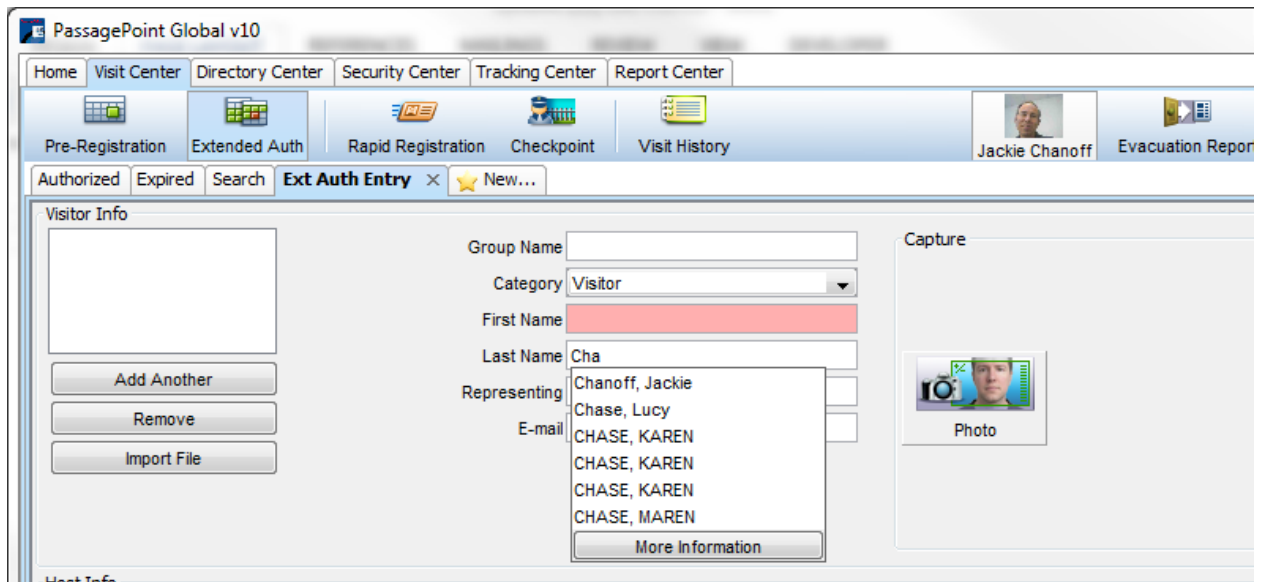
Valid From

Valid To

Days Allowed

Delete Save Extd Auth

- In the Visitor Info section, enter all necessary information. Required fields have a pink background. When entering the visitor's name, if the Intellihint feature is enabled, existing visitor visits with the same name display. You can select the More Information button to see information about the visitor, including a picture. You can then determine if the existing visitor record is for the same visitor.



In the Detailed Information screen above, this is the same visitor with three visits. You can select one of the visits and the Select button to create a Pre-registration with the existing information. If the visitor is not one of the exiting presented, select the Cancel button and continue entering visitor information.

5. Enter the Host name. If Intellihint is enabled, when you type the first and last name or the first few letters of the last name (depending on the settings), all matches are presented.

Host Info

Category: Employee

First Name: [ ]

Last Name: Aus

- Austin, Denise
- Austin, Denise
- Austin, Denise
- Austin, Steve

More Information

Contact Info

Phone

Area

2nd Contact

2nd Contact Phone

Other Contact Information

Send E-mail Notification

Add Another

Remove

Choose from the list or click on the screen and continue typing.

6. If there are more than one host for the visit, select Add Another and enter the additional host.
7. Select the Send E-mail Notification check box to send an email to the host confirming the Extended Authorization.
8. If applicable, enter Other Contacts. An example of an Other Contact, maybe the escort for the visitor. The escort would bring the visitor to the host.
9. Enter information about the visit.

**Print Badge** – check the box to print a badge for the pre-reg when saved

**Note:** You can print the badge later or when the visitor arrives.

**Qty.** – enter the number of badges to print

**Badge Design** – choose the badge to print

**Destination** – choose the visit destination from the drop down list

**Purpose of Visit** – choose the reason for the visit from the drop down list

**Arrival Instructions** – choose the arrival instructions from the drop down list

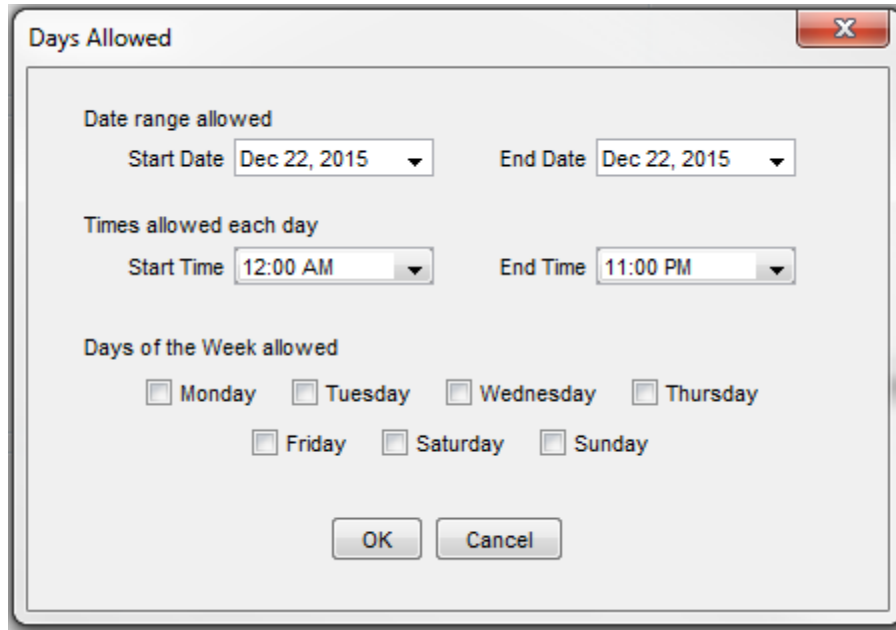
**Security Level** – choose the security level from the drop down list

**Special Instructions** – enter any instructions, for example, “Call my cell phone when visitor arrives”

**Valid From** – choose the date and time from the calendar and time pop up from the drop down arrow. Date and time default to the current date and time.

**Valid To** - choose the date and time from the calendar and time pop up from the drop down arrow. Date and time default to the current date and 11:59pm.

**Days Allowed** – check the box to select the days allowed. The Days Allowed screen displays. From here, you can select the Date range allowed, the Times allowed each day, and the Days of the week allowed. Select the desired information and the OK button.



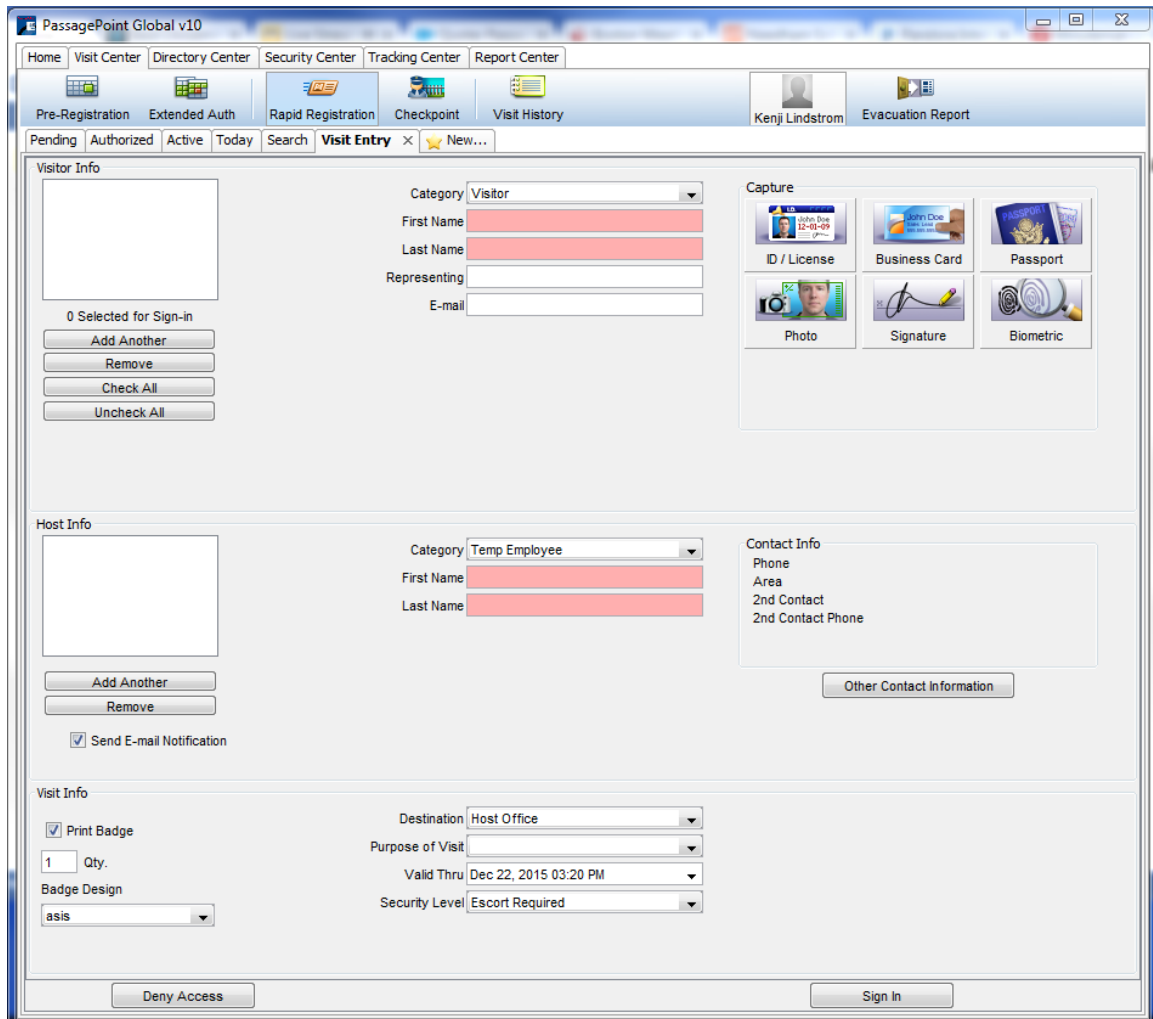
10. Select the Save Pre-Extd Auth button.

### Rapid Registration

If the visitor is not registered in advance, it is necessary to add a visitor to your PassagePoint™ system when they arrive for the visit. These visitors are also called “walk-ins”.

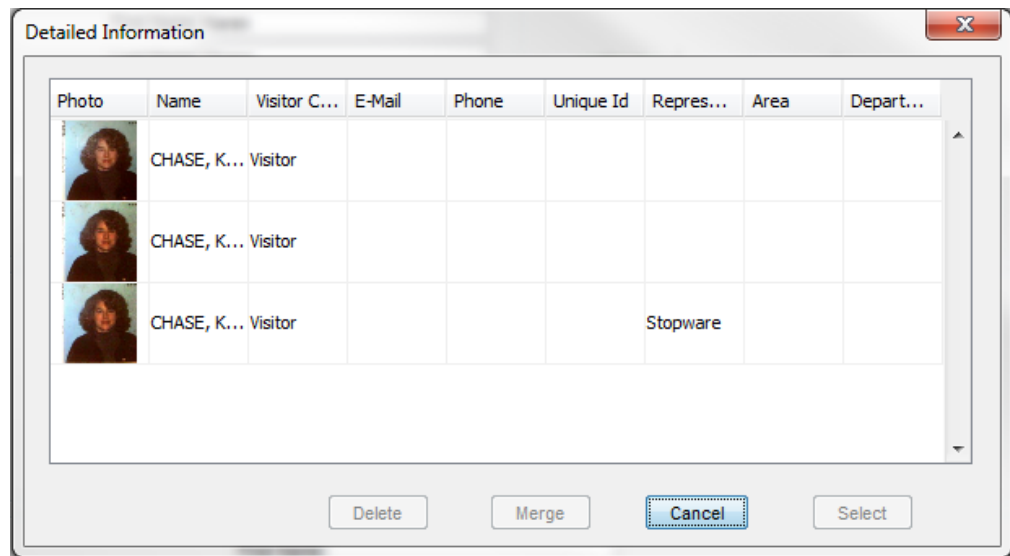
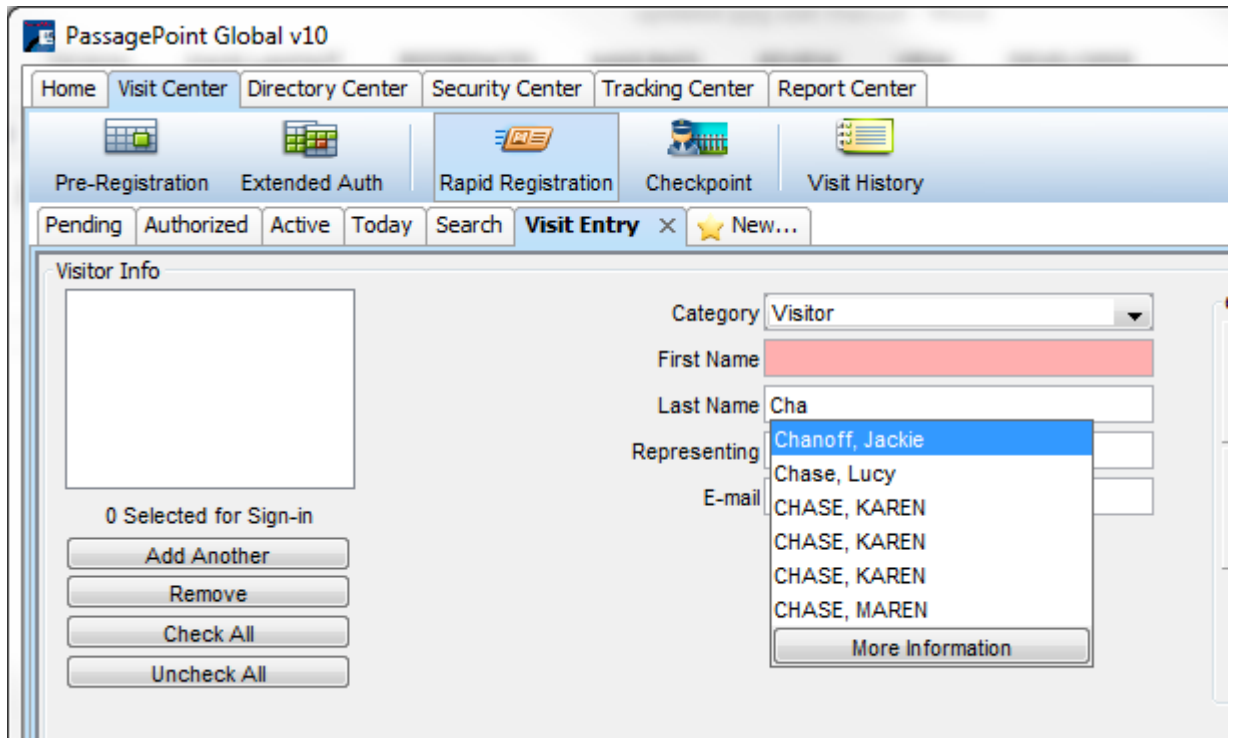
To register a walk-in visitor:

1. From the Visit Center select "Rapid Registration" and the Visit Entry tab. The Visit screen displays.



2. In the Visitor Info section, enter all necessary information. Required fields have a pink background. When entering the visitor's name, if the Intellihint feature is enabled, existing visitor visits with the same name display. You can select the More Information button to see information about the visitor, including a picture. You can then determine if the existing visitor record is for the same visitor.





In the Detailed Information screen above, this is the same visitor with three visits. You can select one of the visits and the Select button to create a Pre-registration with the existing information. If the visitor is not one of the exiting presented, select the Cancel button and continue entering visitor information.

3. Enter the Host name. If Intellihint is enabled, when you type the first and last name or the first few letters of the last name (depending on the settings), all matches are presented.

Choose from the list or click on the screen and continue typing.

4. If there are more than one host for the visit, select Add Another and enter the additional host.
5. Select the Send E-mail Notification check box to send an email to the host announcing the visitor's arrival.
6. Enter information about the visit.

**Print Badge** – check the box to print a badge for the visit when saved

**Qty.** – enter the number of badges to print

**Badge Design** – choose the badge to print

**Destination** – choose the visit destination from the drop down list

**Purpose of Visit** – choose the reason for the visit from the drop down list

**Valid Thru** – choose the date and time from the calendar and time pop up from the drop down arrow. Date and time default to the settings for each category.

**Security Level** – choose the security level from the drop down list

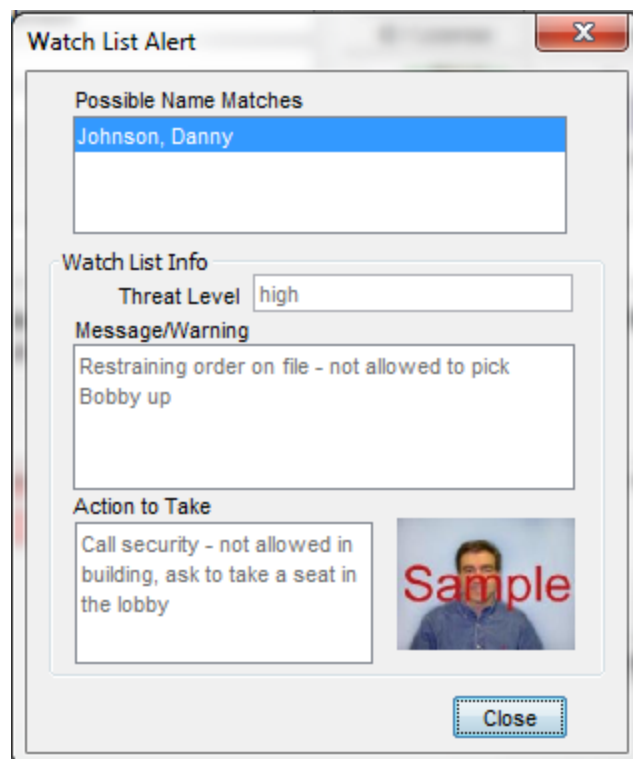
7. Select the Sign In button.

## Visitor Watch List Match

PassagePoint software includes a Security Center where you can create lists of names of people who may require special attention or special actions. For example, you should create a watch list entry for an individual you do not want to admit to your facility. You can include a message indicating the reason they should not be admitted.

Every time a user attempts to create a visit or sign in a visitor with the same last name as a person on the watch list, an on-screen message appears, listing possible name matches. This on-screen notice includes a photo of the watch-list person, if you saved a photo in their watch list record.

After you enter the visitor's name and click into another field, the message appears. The message includes the watch list threat level, message/warning, and the action to take. Follow the action to take. If you are in Rapid Registration, you should confirm that the person on the Watch List Alert is indeed the person standing in front of you and follow your organization protocol. If the person is a match, you can select the Deny Access button. This visitor is now denied access to all PassagePoint client locations and is barred forever.



## Groups of Visitors

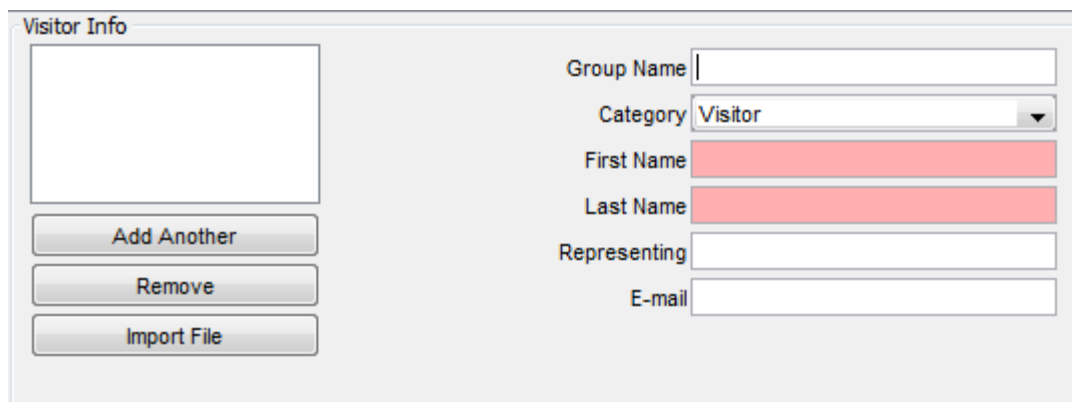
You can register members of a group using a single entry page. All common information remains in the fields so you do not have to re-enter it for each member.

For example, the group name, host name, and contact names are common to all visitors in the group and do not need to be re-entered for each visitor. Watch-list searches are conducted on each individual name, as you enter the name. Each group member appears individually in all appropriate lists and you can sign in visitors individually or as a group. If you view the full record of any group member, the other group members display in that record so it is easy for you to find the names of other members and select multiple names to sign in at once.

To add a group of visitors:

**Note:** the process is the same for Pre-registration, Extended Authorization, and Rapid Registration.

1. From the Entry screen, enter a Group Name and the necessary information of a visitor in the group.



2. Select the Add Another button to add the next visitor. Repeat until all visitors in the group are added. The visitor's names appear in the Visitor Info display box.
3. Enter the Host and Visit information as you would for a single visitor. All this information remains in the fields for all visitors registered from this page.
4. Select the Save/Sign in Button when you finish entering the information for all group members. The visitor record saves and the names appear in all appropriate lists on the designated dates. For example for a Pre-registration, if the start date is tomorrow, the visitor names appear in the list on the tabbed page "Tomorrow Pre-Reg." On the arrival date, the name appears on the Pending list in the Rapid Registration section.

**Note:** If you selected the Print Badge option, the badges print at the designated printer when you save the record.

## Scanning and Capturing Information

Capturing and scanning information, versus manual entry, is a quick method to enter lots of information about visitors to your facility. It also enables you to store and print photos and signatures, to improve your badging and identification methods.

You can scan driver's licenses, business cards, and passports as well as capture photos and signatures using PassagePoint™ software.

**Note:** You need the necessary hardware and software settings configured before you scan or capture this type of information. See your PassagePoint system administrator for additional information.

### Scanning an ID

You may enter directory and visitor information manually or by scanning a driver's license, business card, or passport.

To scan a driver's license, business card, or passport:

1. Open a new record and select ID/License, or Business Card, or Passport icon, depending on the type of document you want to scan. A window opens and displays fields appropriate for the document type you selected to scan. For example, the License Scan Entry window appears if you selected the ID/License icon.



**Note:** If you scan a document different from the type you select, the correct information may not appear in the desired fields.

2. Scan the document according to the manufacturer's instructions for the scanner connected to the workstation. When the scan is complete, an image of the document appears and information populates the fields.

**Note:** If the information populates incorrectly, verify that you scanned the correct document for the icon you clicked. If the document is of the correct type, see your system administrator or IT manager. The scanner may need to be calibrated for differences in state IDs, etc.

3. Review and edit the information for correctness. Most of the information cannot be edited after you save the scanned information.

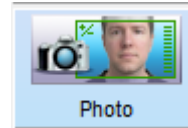
4. Click the "Save" button when you finish. The Scan window closes and the photo and other information appear in their fields in the record.

### Capturing Visitor Photos

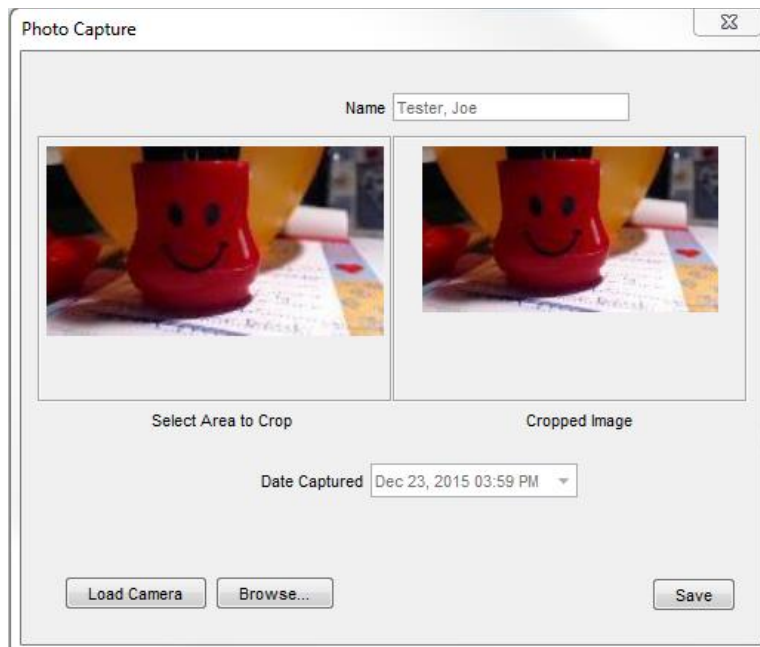
You can capture and store photos using a web camera and/or you can load photos from your computer/network.

To capture a photo:

1. In the desired record, select the photo icon from the Capture section.
2. The Video DataSource window opens and displays a video picture.



3. Ask the visitor to pose while you capture a still photo. When you are satisfied with the image that displays in the window, click the "Capture" button. The Video DataSource window closes and the photo displays in the Camera Capture window.



4. If you want to crop the photo to remove unnecessary elements from the edges:
  - a. Place your mouse cursor on the left-hand image, in the Select Area to Crop section.
  - b. Left click with your mouse and drag the mouse cursor down and to the right, to draw a rectangle on the image.
  - c. Release the mouse and the cropped image displays in the right-hand portion of the window.
  - d. Repeat Steps **a** - **b** until you are satisfied with the cropped image.
5. Select the Save button. The Camera Capture window closes and the photo displays in the record.
6. Continue entering desired information in the record or if just adding the photo save the record.
7. To select an image from your computer/network, select the Browse button and navigate to the desired image.

**Note:** When you capture a photo, the new photo replaces the previously-saved photo. If you subsequently scan a driver's license, the driver's photo does NOT replace the image captured by the camera. They are considered different objects.

### Capturing Visitor Signatures

Your organization may choose to require visitors to sign a visitor agreement, such as a waiver, when the visitor signs in. You can use a signature pad to capture a digital signature for your records. The signature is stored in the PassagePoint system.

To capture a signature:

1. In the desired record, select the signature icon from the Capture section. The Visitor Signature screen displays.



	Agreement Name	Status	Expiry Days	
<input checked="" type="checkbox"/>	Rules and Regulati...		0.0	

I agree to the code of conduct while in the facility.

Previous Signature (if any)

Current Signature

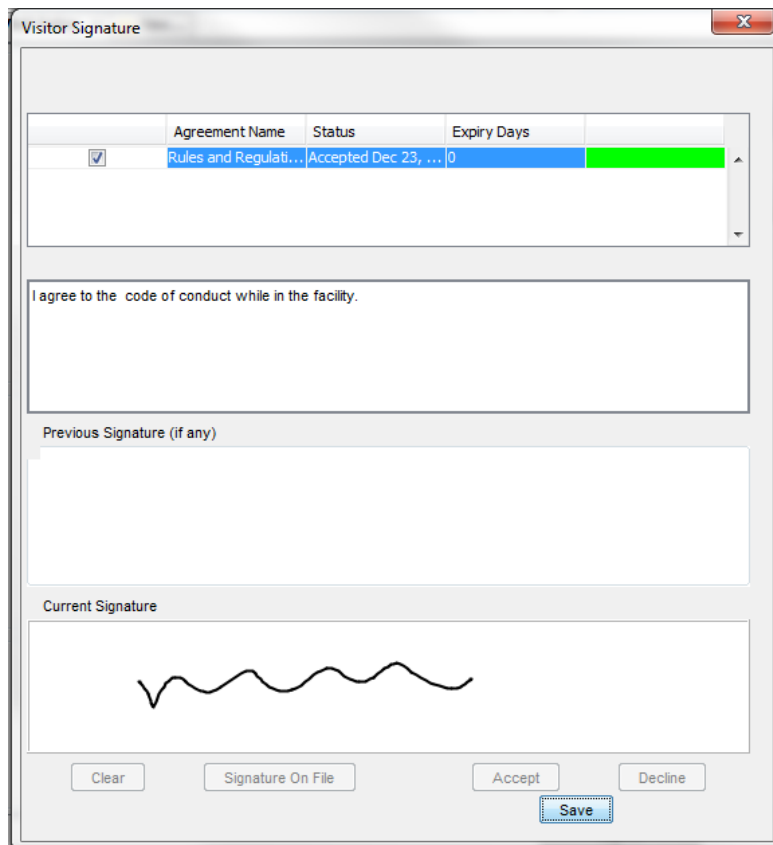
Clear    Signature On File    Accept    Decline    Save

2. If there are multiple agreements, select the desired agreement. Show the agreement to the visitor (usually on paper could be on the signature pad depending on the model) and ask them to sign on the signature pad. The signature appears in the Current Signature window.

**Note:** If you or the visitor are not satisfied with the signature, click "Clear" in the Signature window and the visitor can sign again.

3. Select the Accept button. The color after the Agreement Name/Status/Expiry Days is now green (it was either red or yellow before).





4. Select the Save button.

## Signing in a Visitor

You can sign in individual visitors or, if the visitors were registered as a group you can sign them in as a group or sign in selected members of the group

### Visitor Previously Registered

1. Open the Visit Center and click "Rapid Registration."
2. Select one of the following tabbed pages:
  - a. Pending - if you know the visitor was registered in advance using the Pre-Registration feature
  - b. Authorized - if you know the visitor was registered in advance using the Extended Authorization feature
3. On the Pending or Authorized tabbed page, select the visitor name and click the "Print Badge" button if you want to print a badge for the visitor.
4. On the Pending or Authorized tabbed page, select the visitor name and click the "Sign-In" button.

**Notes:**

- If you are on the Pending tabbed page, the name disappears because the visitor is now active and is no longer pending.
- If you are on the Authorized tabbed page, the name remains in the list if their authorization period has not expired.
- If you do a search on the Search tabbed page, the Source column designation for the visitor is "Active," indicating that the visitor is on the premises.
- If you select the "Active" tabbed page, the name appears in the list, indicating that the visitor is signed in to your PassagePoint system

Group of preregistered visitors

1. Open the Visit Center and click "Rapid Registration."
2. Select one of the following tabbed pages:
  - a. Pending - if you know the group was registered in advance using the Pre-Registration feature
  - b. Authorized - if you know the group was registered in advance using the Extended Authorization feature

**Note:** If you do not know how the group was registered or you cannot easily find the individual visitor names by using the Search function.

Once you find the name of one of the group members you must sign in, you can then locate it in the Pending tabbed page (for Pre-Registered visitors) or Authorized tabbed page (for Extended Authorization visitors).

3. On the Pending or Authorized tabbed page, select the visitor name and click the "View Full Record" button. The record for that group member opens.

**Note:** The names of the other group members are listed in the display box in the upper left-hand corner of the screen.

4. Place a check mark in the check box next to the name of each group member you want to sign in.

**Note:** The names that are not checked will not be signed in at this time but remain available for sign in until the visit time expires.

5. Click the "Sign In" button

**Notes:**

- If you are on the Pending tabbed page, the name disappears because the visitor is now active and is no longer pending.
- If you are on the Authorized tabbed page, the name remains in the list if their authorization period has not expired.
- If you do a search on the Search tabbed page, the Source column

designation for the visitor is "Active," indicating that the visitor is on the premises.

- If you select the "Active" tabbed page, the name appears in the list, indicating that the visitor is signed in to your PassagePoint system

### Printing a Badge

There are a few ways to print badges for visitors. You can print a badge when you create their record in Pre-Registration, Extended Authorization, or Rapid Registration. You can print a badge when you locate a visitor on a ribbon tab such as, Today's Pre-Reg, Tomorrow's Pre-Reg, Authorized, Pending, Active, Today or from a simple or advanced Search.

### Signing Out a Visitor

When a visitor leaves you can sign them out. Signing a visitor out is quick and easy and helps you to keep track of who is in your facility. This may be extremely important if there is an emergency. There are three ways to sign out a visitor: manually, via barcode scan, and automatically.

#### **Manual Sign out**

To sign a visitor out manually, locate the visitor's record and select the Sign Out button. You can locate a record via Search or from a ribbon tab in the Rapid Registration Center.

#### **Barcode**

You can use a barcode scanner to sign a visitor out by printing a badge that includes a barcode of the visit. When the visitor is leaving, just scan the barcode on the badge and the visitor is signed out without disturbing your current work.

#### **Automatic**

Each People Category is assigned a Visit Duration and an Expired Visit Grace Period, these determine the allowed length of a visit. Unless the auto signout is disabled, the visitor is automatically signed out when the length of the visit is reached.

### Checkpoint

Use the Checkpoint option to create a new visitor record, similar to a Pre-Registered visit, or to record that a specific visitor passed a security point. This option is commonly used at stop points, for example a guard house at the entrance to a parking lot.

A visitor who has not yet signed-in to the system must still sign-in using the Rapid Registration option

To create a new record in Checkpoint:

1. From the Visit Center select "Checkpoint"
2. Click the "Checkpoint Entry" tab to display a new, checkpoint entry page.
3. Enter all necessary information in the Visitor, Host, and Visit Info sections.
4. Click the "Finish" button at the bottom of the page when you finish entering the information. The visitor record saves and the name appears on the Pending tabbed pages in the Checkpoint section and the Rapid Registration section.

**Notes:**

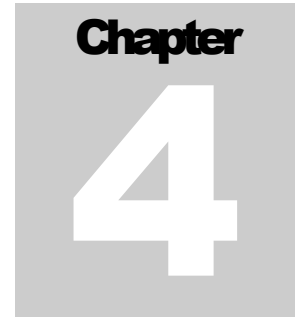
- If you do a search on the Search tabbed page, the Source column designation for the visitor is "Active," indicating that the visitor is on the premises.
- If you select the "Active" tabbed page, the name does NOT yet appear in the list, indicating that the visitor is NOT signed in to your PassagePoint™ system. The visitor must still sign-in through Rapid Registration

## Visit History

View records of today's or yesterday's visits to your facility.

1. Open the Visit Center module and click "Visit History."
2. Click one of the tabs to view the records.

**Note:** If a record contains a "Date/Time In" but does not contain a "Date/Time Out," the visitor has not yet signed out. If a record does not contain a time entry in either category, that visitor was added to the PassagePoint™ system using the Checkpoint option and is on the premises but has not yet signed in to the system.



## Chapter 4 – Tracking Deliveries and Property

You can track deliveries and property in PassagePoint Global in the Tracking Center.

### Deliveries

When a delivery arrives you can enter it in PassagePoint Global and track its arrival and delivery to the recipient.

To create a Delivery:

1. From the Tracking Center select Delivery and then Delivery Entry. The delivery entry screen displays.

 A screenshot of the PassagePoint Global v10 web application interface. The window title is "PassagePoint Global v10". The navigation bar includes "Home", "Visit Center", "Directory Center", "Security Center", "Tracking Center", and "Report Center". The "Tracking Center" is active, showing "Delivery" and "Property" tabs. The main content area is titled "Delivery Entry 6" and contains three sections:
 

- To Recipient:** Includes a "Category" dropdown menu, and input fields for "First Name" and "Last Name". To the right is "Contact Info" with fields for "Phone", "Area", "2nd Contact", and "2nd Contact Phone", plus a "More..." button.
- Package Info:** Includes a "Category" dropdown menu (set to "Employee"), and input fields for "Shipper's First Name", "Last Name", and "Representing". To the right are fields for "Internal Tracking #", "Shipper Tracking #", "Courier" (set to "UPS"), "Delivery Item Type" (set to "Box"), "Delivery Description", "Number of Packages" (set to "1"), and "Receive Date" (set to "Dec 14, 2015 03:15 PM").
- Delivery Info:** Includes a "Category" dropdown menu (set to "Employee"), and input fields for "Accepted By First Name", "Last Name", and "Destination". To the right is a "Signature" field with a signature icon and a "Pick-Up Date" dropdown menu.

 A "Finish" button is located at the bottom right of the form.

2. Enter the first and last name of the delivery recipient. (**Note:** if the Intellihint feature is enabled you will be able to type part of the name to receive matching

entries. Ask your PassagePoint System Administrator if Intellihint is enabled on your system.)

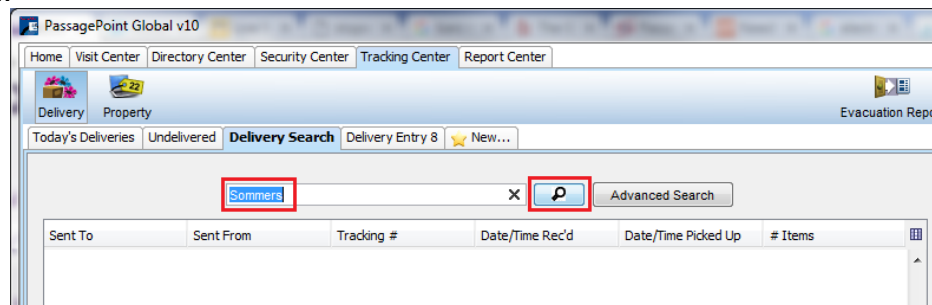
3. Enter information about the package: who it's from, the tracking numbers, courier, type, description, and number of packages. The delivery date defaults to today's date. You may change this if the date received is different.
4. When the package is delivered to the recipient, enter the first and last name of the person who accepted the package. The accepted person may be different from the package recipient.
5. Select the pick-up date from the calendar under the drop down arrow.
6. If desired, you can capture the signature of the person who picked up the package by selecting the Signature button.
7. Select the Finish button.

### Searching Deliveries – Finding a Delivery

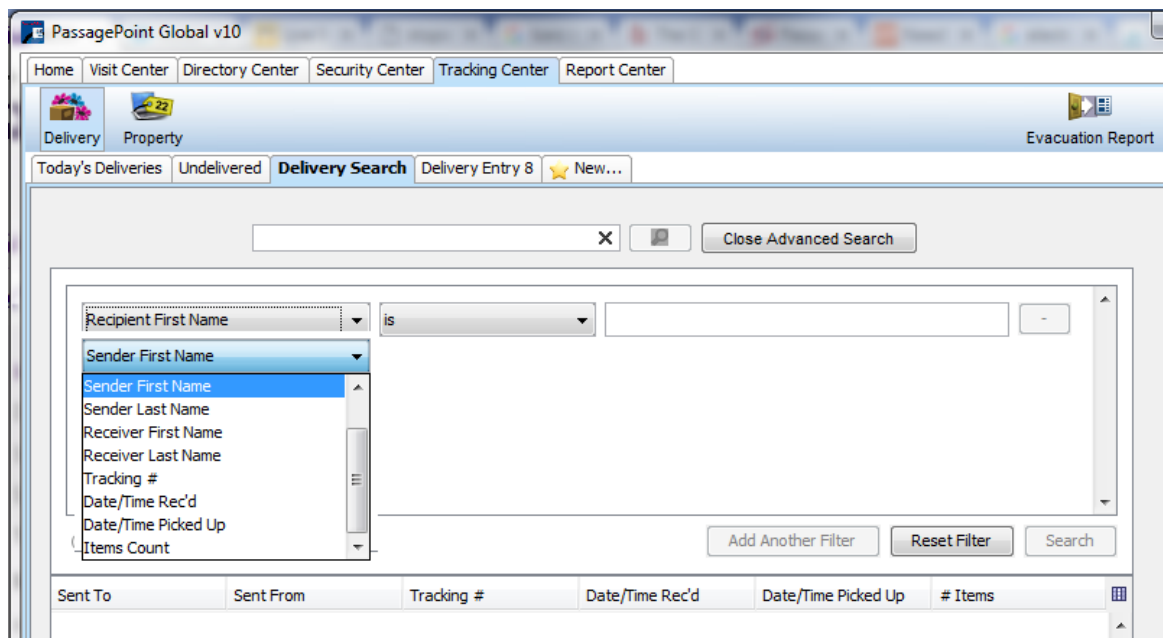
When a person arrives to pick-up a delivery, you must find the delivery to update the record with the pick-up information. There are a few ways to find a delivery: Today's Deliveries, Undelivered, and Delivery Search.

To find a delivery:

1. If the delivery was made on the current day, select the Today's Deliveries tab to see all deliveries made today. Or, select the Undelivered tab for a list of all deliveries waiting to be delivered. Or, you can search for a package using the Delivery Search tab. Enter a name or other identifying information and the search button.



Use the Advanced Search button to search by more specific information.



You can select multiple filters and qualifiers. The filters are:

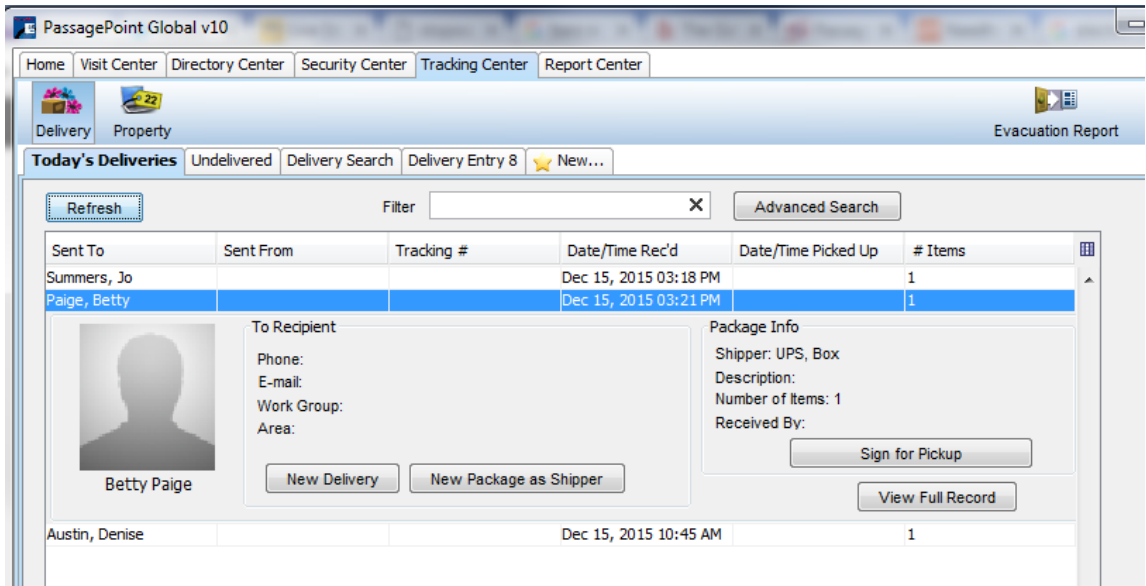
- Recipient First Name
- Recipient Last Name
- Sender First Name
- Sender Last Name
- Receiver First Name
- Receiver Last Name
- Tracking #
- Date/Time Received
- Date/Time Picked Up
- Items Count

The qualifiers are:

- Is
- Isn't
- Begins with
- Ends with
- Contains

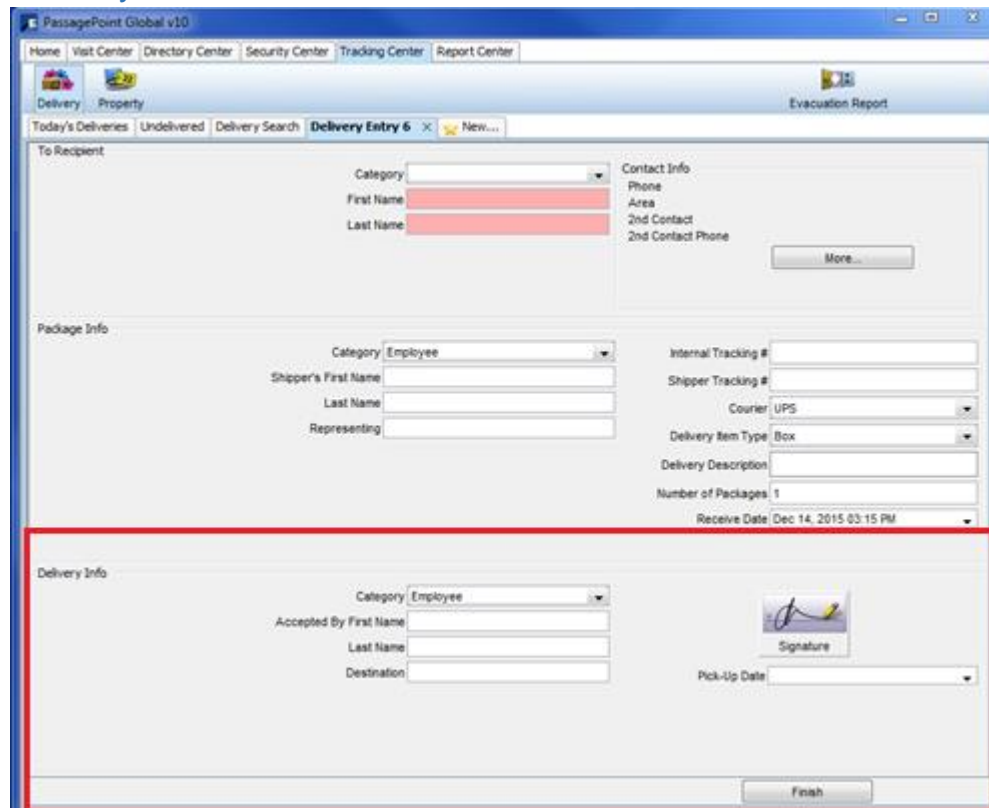
Use the Add Another Filter button to add more filters and the Or/And operators. Select the Search button to run the search.

2. Select the desired delivery from the list.



3. Select the Sign for Pickup or View Full Record button to enter pick-up information.

## Delivering a Delivery



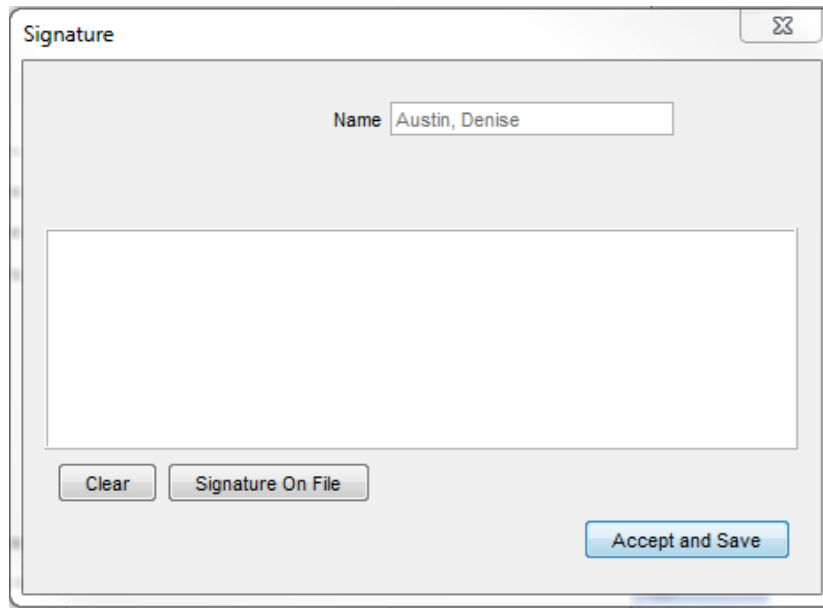
When the package is delivered to the recipient:



1. Enter the first and last name of the person who accepted the package. The accepted person may be different from the package recipient.
2. Select the pick-up date from the calendar under the drop down arrow.
3. If desired, you can capture the signature of the person who picked up the package by selecting the Signature button.
4. Select the Finish button.

### Using Signature with Deliveries

You can capture the signature of the person accepting the delivery by selecting the Signature button. The Signature screen appears.



1. Ask the person to sign on the signature capture pad; the signature appears on the screen.
2. Select the Accept and Save button.

### Property

When Property, such as a laptop, is brought into the facility or lent out of the facility, it is tracked in PassagePoint Global in the Tracking Center, Property.

To create Property:

1. From the Tracking Center select Property and then New Property. The property entry screen displays.

2. Select the property type: Company Owned for property being lent. Personally Owned for property being brought into the facility.
3. Enter the first and last name of the Responsible Person – the person borrowing the property. **(Note:** if the Intellihint feature is enabled you will be able to type part of the name to receive matching entries. Ask your PassagePoint System Administrator if Intellihint is enabled on your system.) For Company Owned property, enter the first and last name of the person who owns the property.
4. Enter information about the property: the item type, description, approver, ID/asset tag, number of items, location and cost center if known/required. The Date Entered (Issued) and defaults to today’s date and the Date Due defaults to the next day. You may change this if the date due is different.
5. You may print a badge for the property by selecting the Print Badge checkbox and selecting the quantity and badge design.
6. When the property is returned, select the return date from the calendar under the drop down arrow.

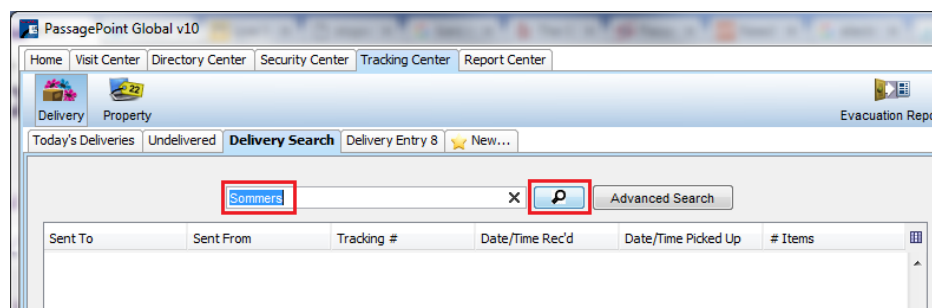
7. If desired, you can capture the signature of the person by selecting the Signature button.
8. Select the Finish button.

### Searching Property – Finding a Property

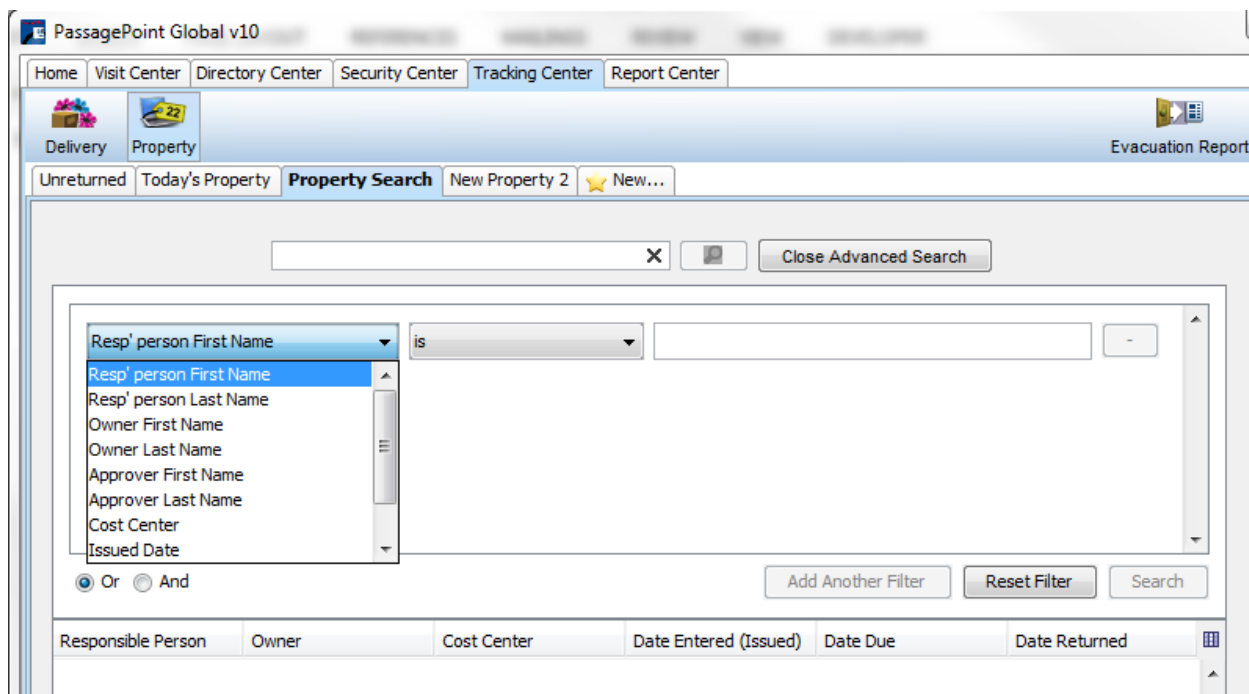
When the property is returned, you must find the property to update the record with the return date. There are a few ways to find property: Unreturned, Today's Property, and Property Search.

To find Property:

1. Select the Unreturned tab for a list of all property waiting to be returned. If the delivery was made on the current day, select the Today's Property tab to see all Property loans made today. Or, you can search for property using the Property Search tab. Enter a name or other identifying information and the search button.



Use the Advanced Search button to search by more specific information.



You can select multiple filters and qualifiers. The filters are:

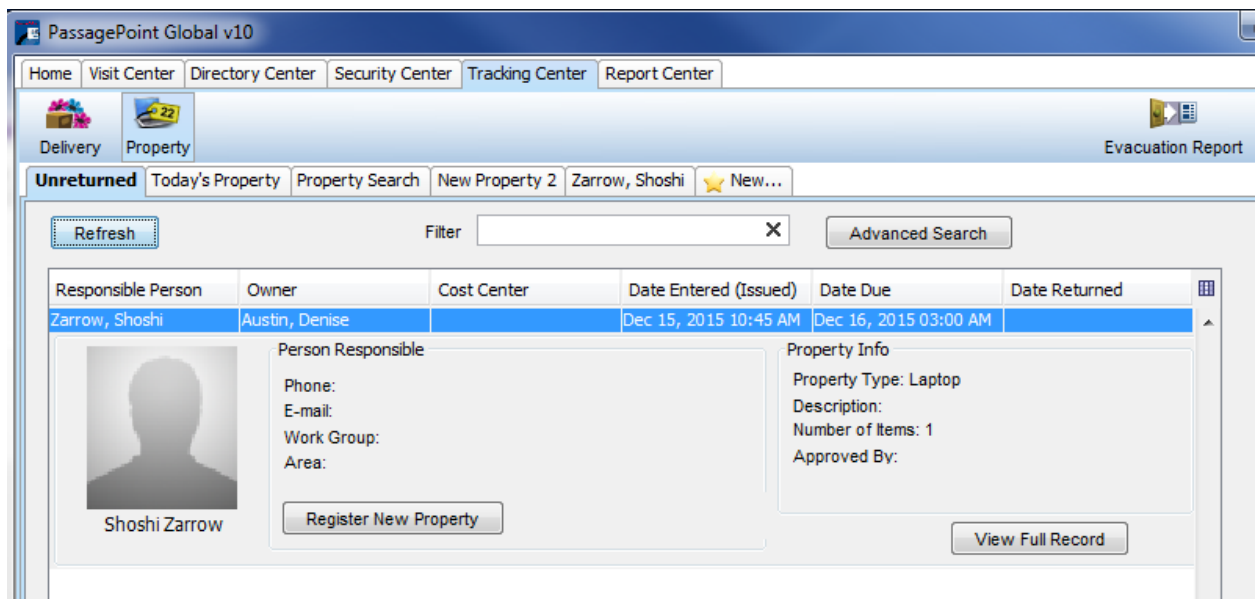
- Responsible person First Name
- Responsible person Last Name
- Owner First Name
- Owner Last Name
- Approver First Name
- Approver Last Name
- Cost Center
- Issued Date
- Due Date
- Returned Date

The qualifiers are:

- Is
- Isn't
- Begins with
- Ends with
- Contains

Use the Add Another Filter button to add more filters and the Or/And operators. Select the Search button to run the search.

2. Select the desired property from the list.



3. Select the View Full Record button to enter returned date.

## Returning Property

PassagePoint Global v10

Home Visit Center Directory Center Security Center Tracking Center Report Center

Delivery Property Evacuation Report

Unreturned Today's Property Property Search New Property 2 x New...

Property Type  Company Owned  Personally Owned

Responsible Person

Category: Visitor

First Name: [Redacted]

Last Name: [Redacted]

Borrower Info

Phone: [Redacted]

Area: [Redacted]

2nd Contact: [Redacted]

2nd Contact Phone: [Redacted]

More...

Signature

Owned By

Category: Employee

First Name: [Redacted]

Last Name: [Redacted]

Approver Info

Phone: [Redacted]

Area: [Redacted]

2nd Contact: [Redacted]

2nd Contact Phone: [Redacted]

More...

Property Info

Print Badge

Qty: 1

Badge Design: asis 2015

Item Type: Laptop

Description: [Redacted]

Approved By First Name: [Redacted]

Last Name: [Redacted]

Property ID/Asset Tag: [Redacted]

Number of Items: 1

Location: [Redacted]

Cost Center: [Redacted]

Date Entered (Issued): Dec 15, 2015 04:40 PM

Date Due: Dec 16, 2015 03:00 AM

Date Returned: [Redacted]

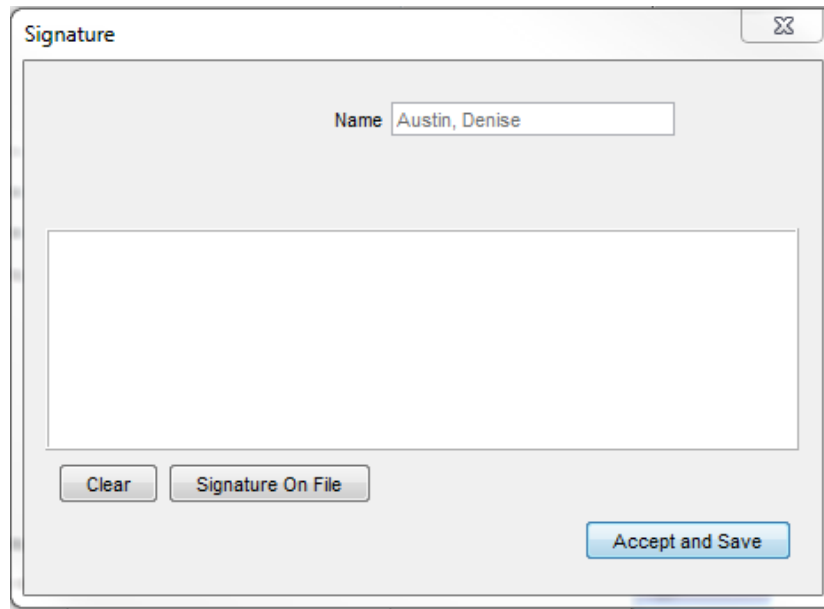
Finish

When the property is returned:

1. Select the returned date from the calendar under the drop down arrow.
2. If desired, you can capture the signature of the person who picked up the package by selecting the Signature button.
3. Select the Finish button.

## Using Signature with Property

You can capture the signature of the person who returned the Property by selecting the Signature button. The Signature screen appears.



3. Ask the person returning the property to sign on the signature capture pad; the signature appears on the screen.
4. Select the Accept and Save button.

## Chapter 5 – Reporting

PassagePoint Global comes with over 30 pre-programmed reports and a custom report builder allowing you to create almost any report needed.

### Reports

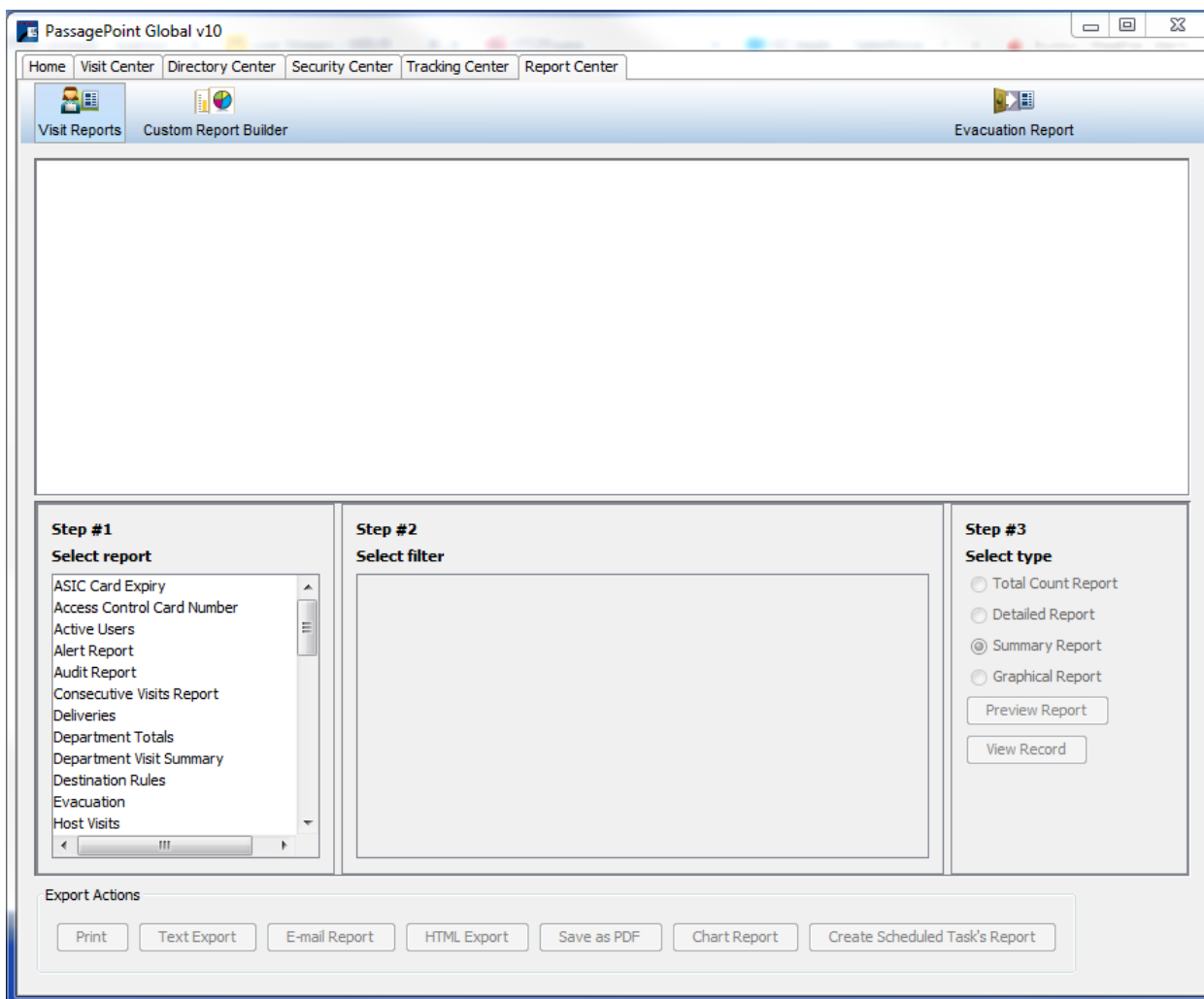
The pre-programmed reports are: (listed alphabetically)

ASIC Card Expiry	People with No Photo
Access Control Card Number	Person with UID
Active Users	Pre-Registration Report
Alert Report	Property
Audit Report	Todays In-active Pre-Regs
Consecutive Visits Report	Training Visit Report
Deliveries	Unique ID by Visit Times
Department Totals	Visit Audit Merge
Department Visit Summary	Visit Duration
Evacuation	Visit Limit Exceeded
Host Visits	Visit Log
Hourly Visits Per Destination	Visit Purpose
NDA Report	Visit Status Report
No Show	Visit Tracking Number
Overridden Visits	Workgroup Visit Report

Report filtering and sorting varies by the type of report. Typical filter and sort choices include, date frame, host, destination, category, and department.

To run a report:

1. From the Report Center, select the Visit Reports icon. The Visit Reports screen appears.



2. Select the desired report from the list.
3. Select the desired filters.
4. Select how you want to see the report – total count, detailed, summary, or graphical.
5. Select the Preview report button to see the report display in the top of the screen.
6. Choose an Export Action:
  - a. Print
  - b. Text Export
  - c. E-mail Report
  - d. HTML Export
  - e. Save as PDF

**Schedule a Report** – need to have this feature enabled by your PassagePoint System Administrator (see doc How to Schedule a Task)

Once the feature is enabled, your Schedule a Task button on the reports is active.

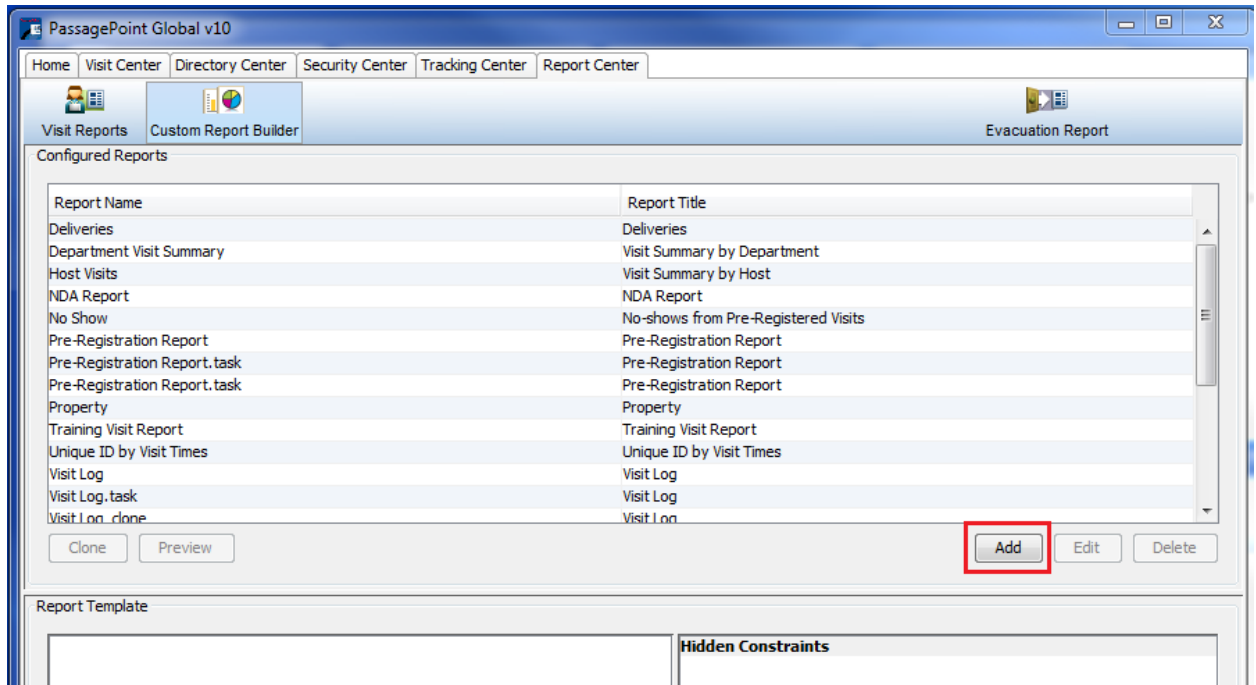


## Custom Report Builder

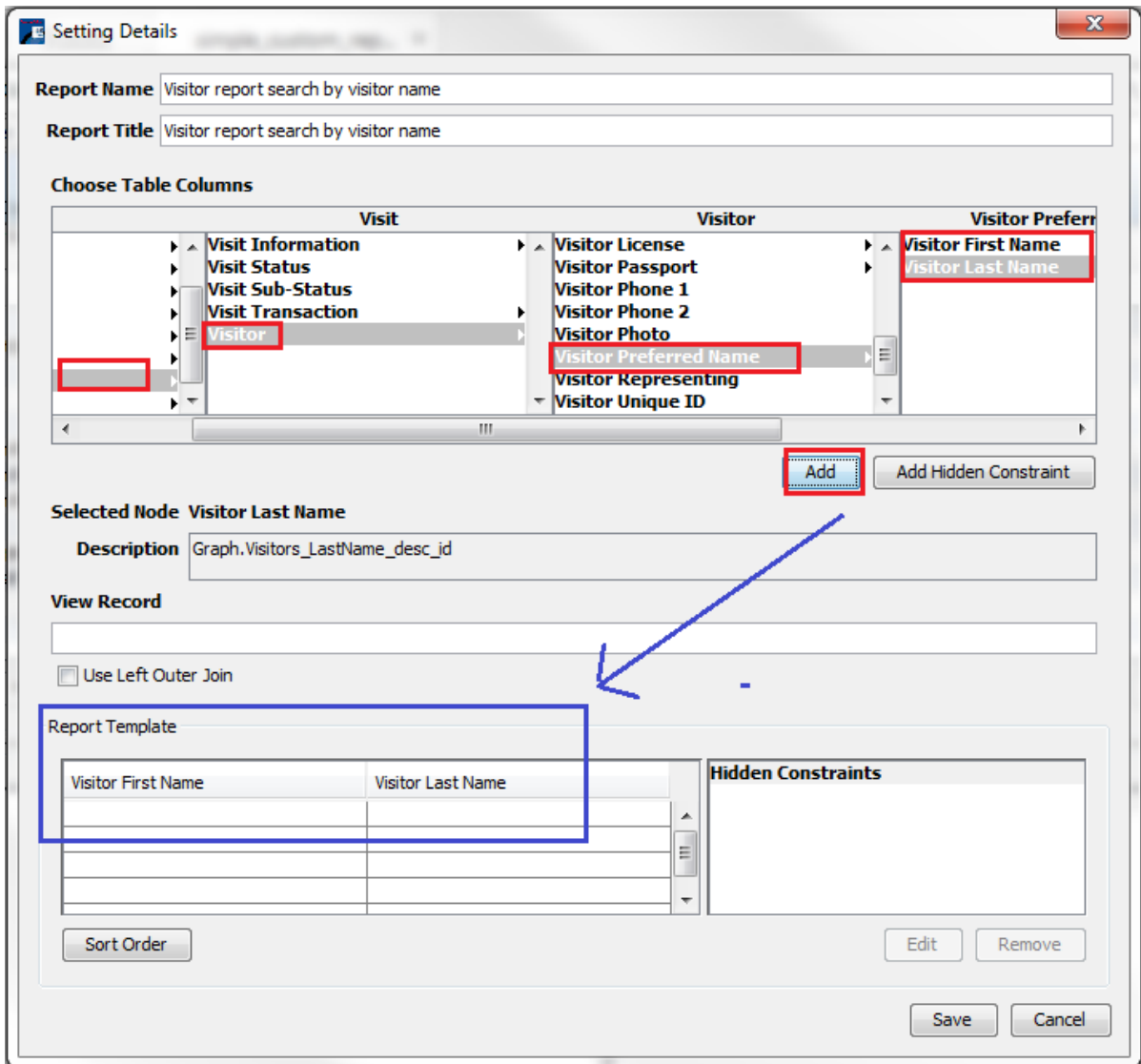
PassagePoint Global includes a custom report generator that allows users to produce an almost unlimited number of reports. The report generator is simple and easy to use.

To create a custom report:

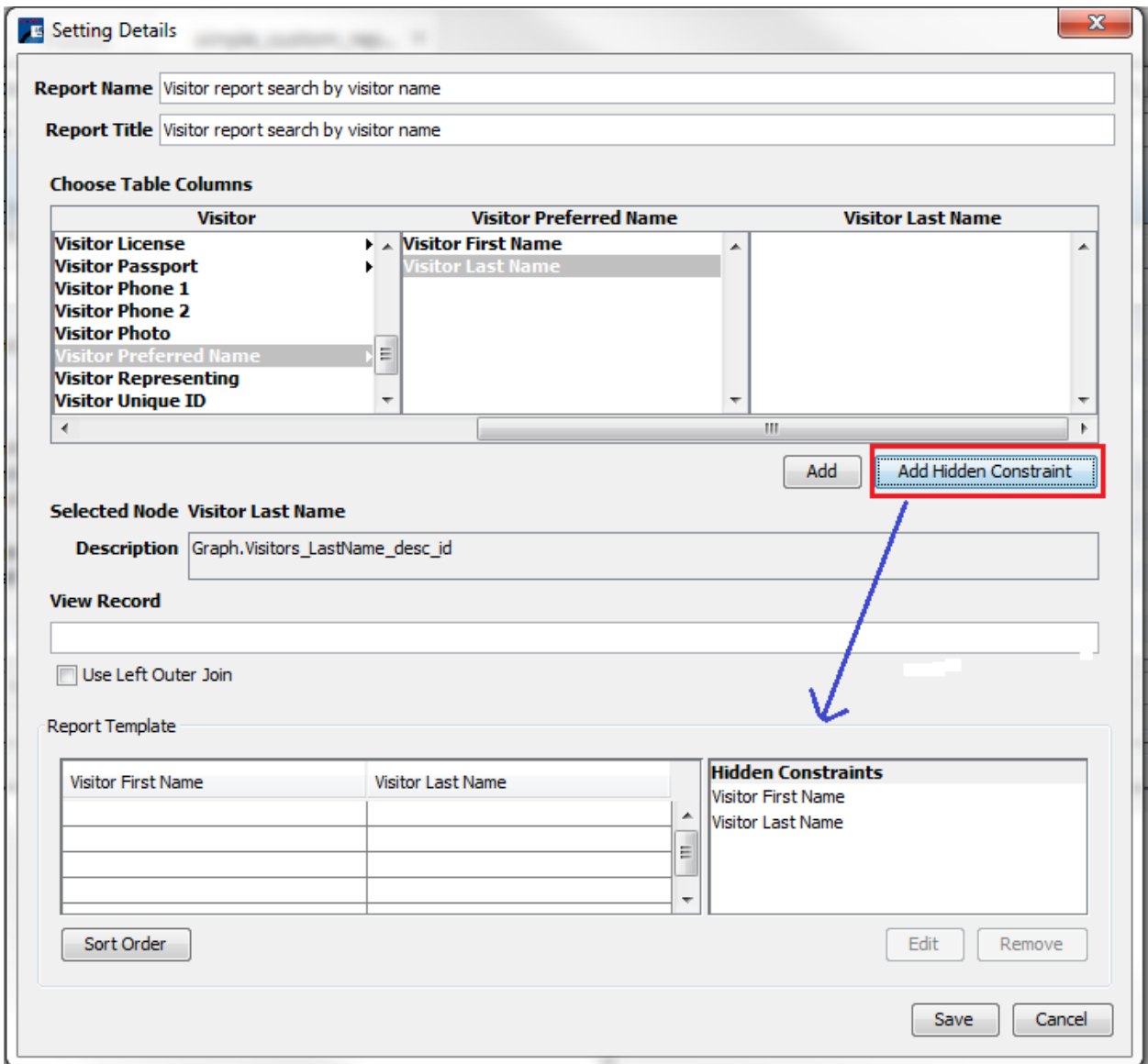
1. From the Report Center, select Custom Report Builder.
2. Select the Add button.



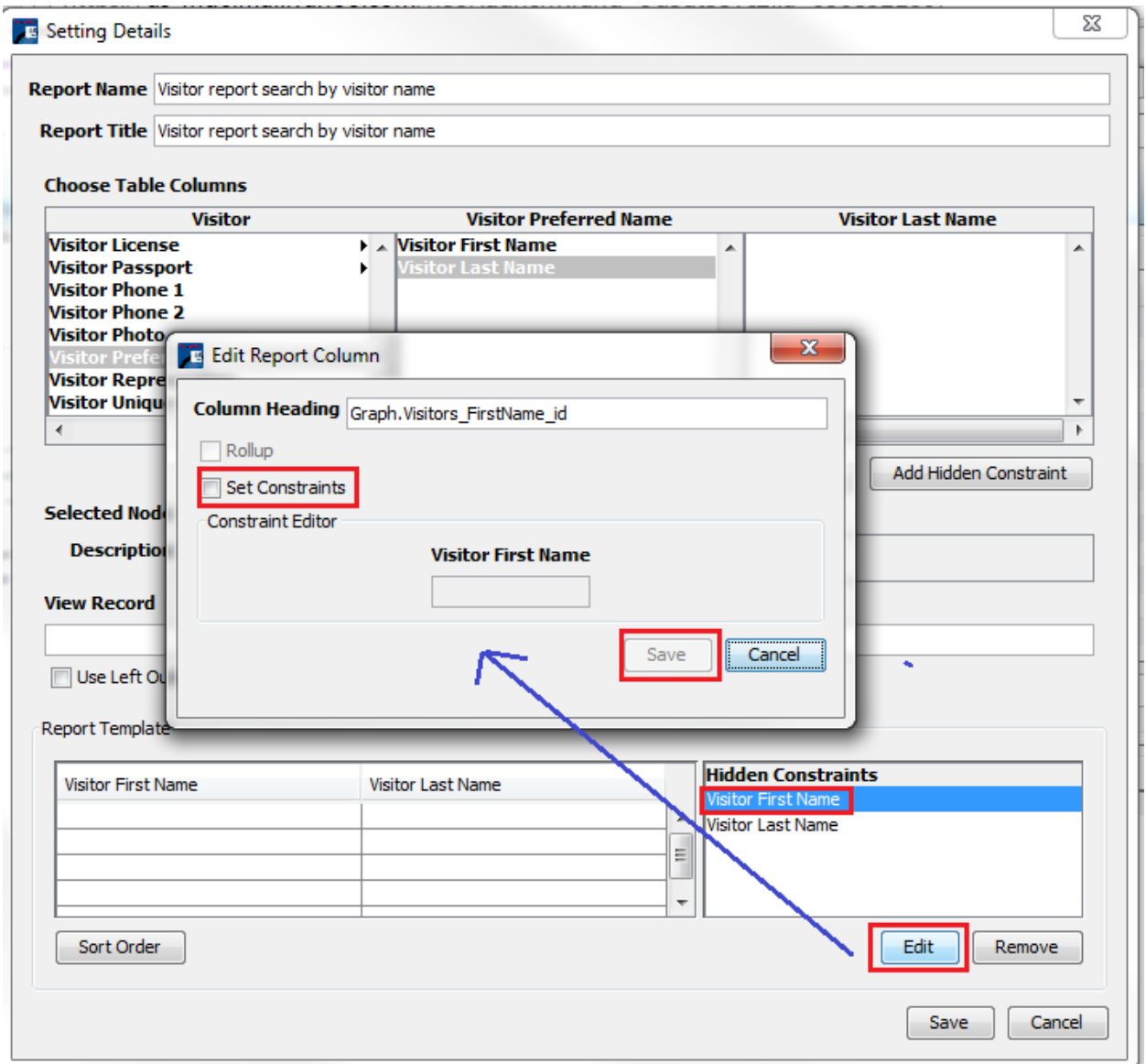
3. The Setting Details screen for the report appears. Enter a Report Name and a Report Title. In the example below, we are creating a report that allows you to run a report with a filter of the visitor's first and last names.
4. Select the Table Columns: Visit, Visitor, Visitor Preferred Name, Visitor First Name, and Visitor Last Name.
5. Hit the Add button after First Name and Visitor Last Name; the fields display under Report Template.



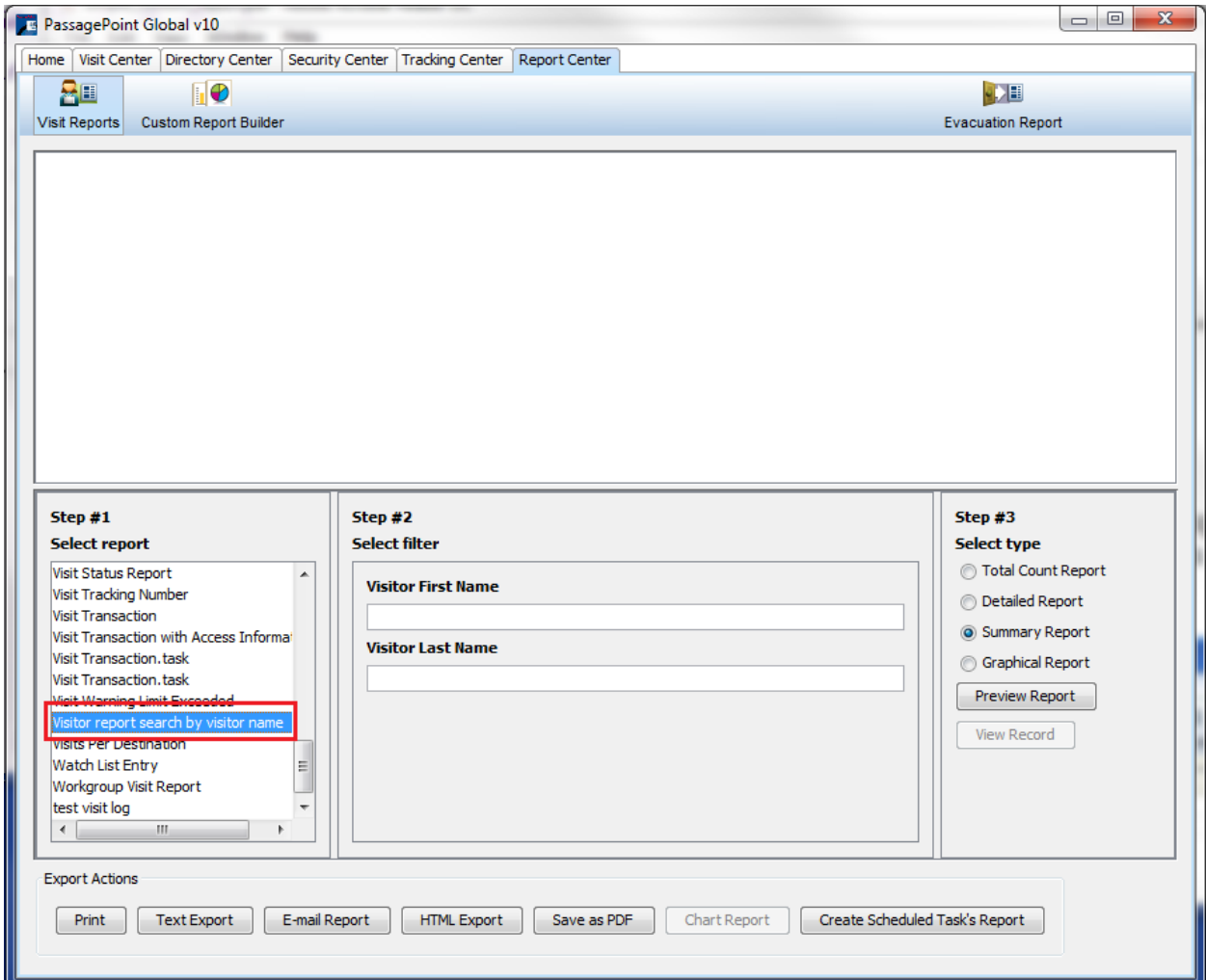
6. Repeat the steps above with the First and Last Name, but select the Add Hidden Constraints Button.



7. Select the Visitor First Name from the Hidden Constraints section and the Edit button. The Edit Report Column screen displays.



8. Select Set Constraints and then the Save button. Repeat for Visitor Last Name.
9. Select the Save button to save the custom report.
10. To view the custom report, from the Report Center, select Visit Reports. The new custom report is now listed. **Note:** reports are listed in alphabetical order.

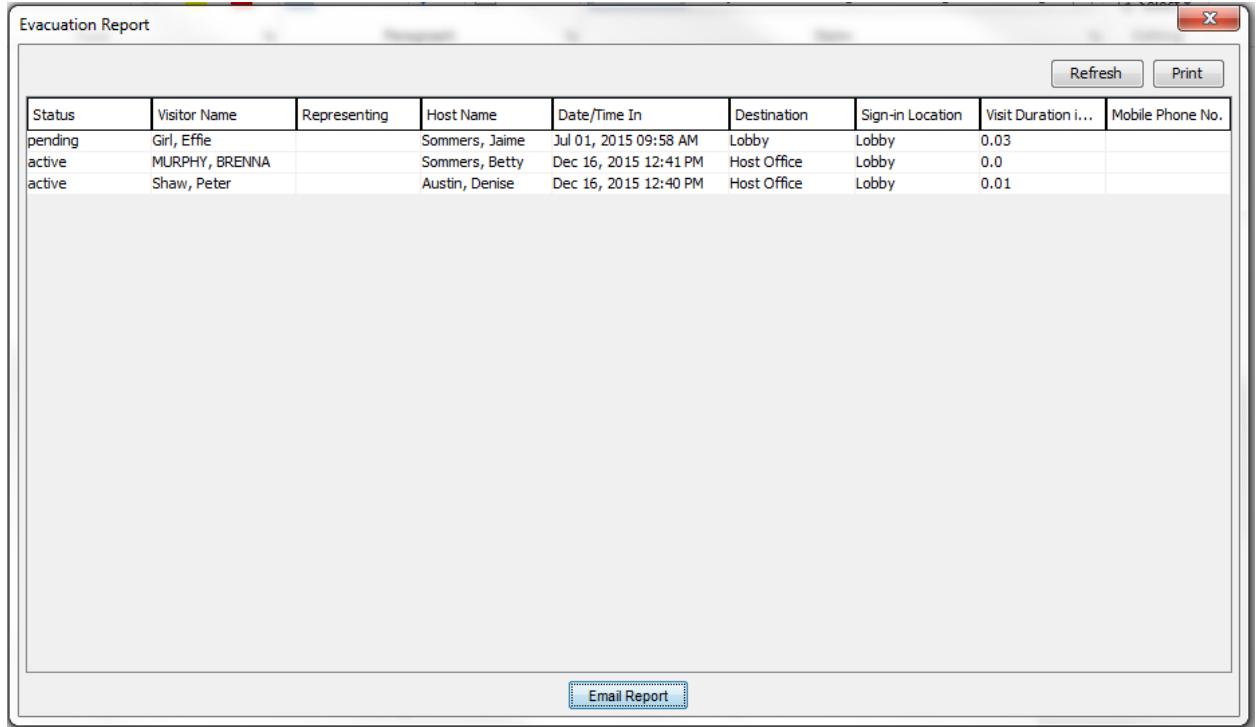


## Evacuation Report

The Evacuation Report contains a list of all the current visitors. In an emergency situation, the Evacuation Report button allows a user to easily print and email the list of visitors in a building at any time. The Evacuation report button is available from all of the Centers.

To run the Evacuation Report, select the icon on the top left of the screen. The Evacuation Report displays.



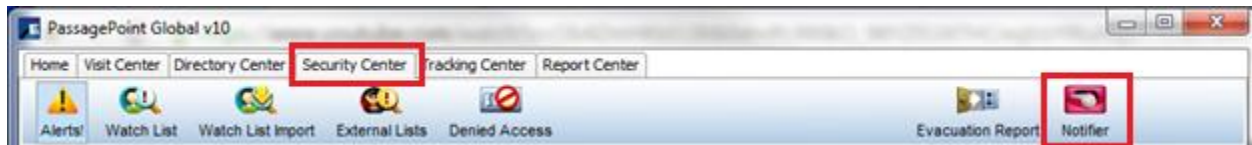


Select the Email Report button to email the report and the Print button to select a printer and print the report.

## Notifier

The Notifier is used to send an email to active visitors to let them know of a situation in the building. You can send a notification to specific Categories, Locations and/or Work Groups. You determine the content of the email message.

The Notifier is located in the Security Center.



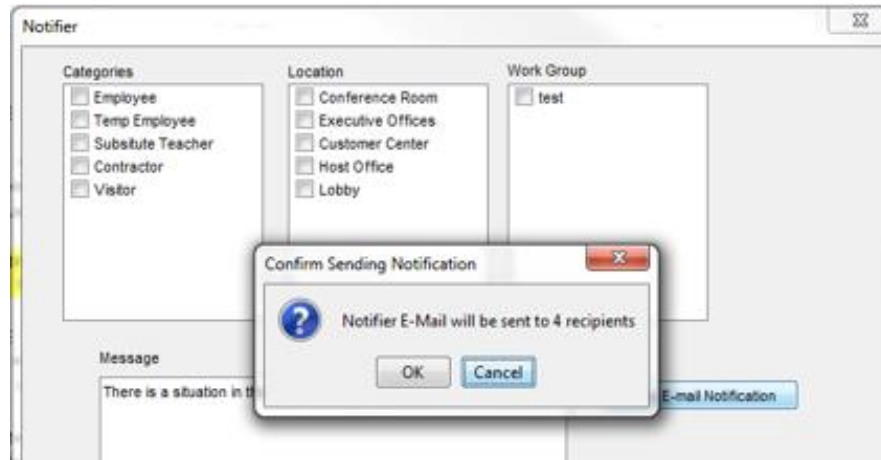
To configure and send a Notification, select the Notifier Icon.



The Notifier screen appears. Determine who you want to receive the notification by selecting the desired Categories, Locations, or Work Groups and enter a message.

- If you don't select any Categories, Locations, or Work Groups, a notification will be sent to all active visitors who were registered with an email address.
- If none of the selected Active visitors has email in its record, then an Alert will be shown "No email addresses defined in person records", after you accept the Confirm Sending Notification.

- If some of the visitors have email and others do not, an error does not show and PassagePoint will send the message to visitors that have an email address.



How the selections work:

- If single selection is checked, the email message will be sent to all active visitors of that selection, i.e. Categories 'Contractor'.
- If multiple checkboxes of same selection are checked, i.e. Category 'Visitor', 'Temp Employee' and 'Contractor' are selected, then the email message will be sent to those Active visitors that are either "Visitor", 'Temp employee' or 'Contractor' category.
- If two or more different selections are checked, i.e. 'Visitor' Category and 'Executive Offices' Location, then the email message will be sent to only those Active visitors with 'Employee' category and whose visit destination is 'Executive Offices'.
- If all checkboxes in this screen are checked then all active visitors get the email.

There is no email template for the Notifier. The email body will have the content specified in the "Message" Text Area and the email subject will be "Notifier E-Mail" (although you can change this in the locale file).

If you select a Category and/or Location and/or Work Group that does not have any signed-in visitors, a message indicating that zero recipients will receive a notification displays.

