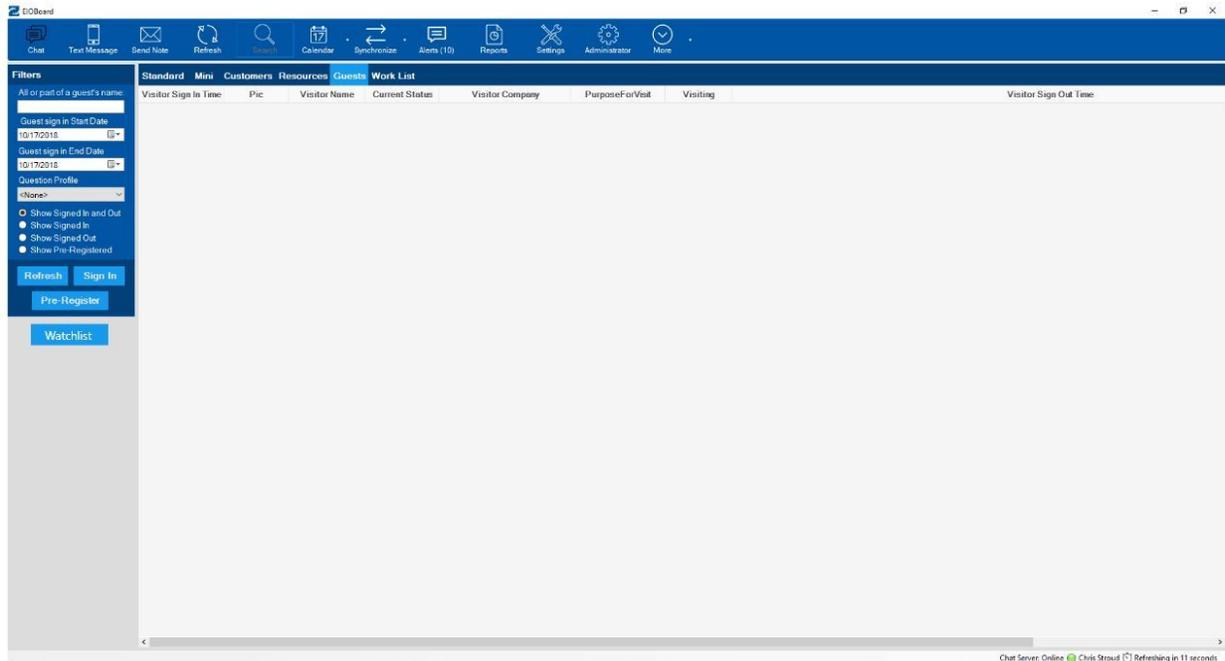


Manned Visitor Management Suite

This new suite of tools consists of three modules. The spec of each is described below. At some point, we need to determine how we will license these features. This suite consists of a Watchlist - essentially a list of persons denied entry, The Add Visitor tool - used for signing in visitors, gathering their information and adding that information to the database and the Badge/Label Printing and Activation module - used to print labels and badges with dynamically populated visitor information, assign badge ids to users in the system and/or activate badge ids entered into EIOBoard within an access control system integrated with the customer's EIOBoard account. This is replacing existing functionality in the application interface, but it should be written in browser technology, specifically HTML, CSS, and Angular.

The screens should be responsive and tested on a mobile device up to a full desktop PC running 1920x1080. Multiple browsers should be tested as well. Specifically Chrome, Edge, and Firefox.

Watchlist



The Watchlist is opened within the existing desktop application using a Watchlist button that will be added to the left of the current guests tab. It should just be in the search box probably rather than outside of it as shown above.

Data Model and Processing for the Watchlist

Do not add any new tables to the database in order to facilitate the Watchlist. This functionality will work by adding two columns to the Contacts table; watchlist (set to null, values 0 or 1) and watchlist comment (String or Varchar). If a person is added to the watchlist their watchlist column value is set to 1. When they are deleted it is set to 0. When they are deleted the Watchlist comment will be set to null. Watchlist comment will be required to enter someone onto the Watchlist.

Add new Permissions and a new Security Group for this feature. The new permissions will be "Watchlist Management" - add, edit, and remove persons from the watchlist and "Bypass Watchlist" - bypass the watchlist warning/sign people on the watchlist in. The new Security Group will be Watchlist Manager which will have both permissions. Admins and Master Admins, as usual, will have these permissions by default.

Existing Staff and Patients can be entered into the watchlist. If the entry to the watchlist is a new person, however, they will be added as a visitor. A check will always be performed to ensure no

duplicate entries are getting created or staff users are being entered as patients and ending up with one record on the watchlist and one off.

	Name	Company	Comment		
	Anderson, Steve	N/A			
	Bardocz, Steve	Savance	Be careful. Person very dangerous.		
	Johnson, Steve	Apple			
	Lucas, Steve	Microsoft			
	Wilko, Steve	Travelocity			

When the user clicks the Watchlist button the Guests tab, this window will open displaying anyone who is on the watch list. As the user types in the name of the person they wish to add, the watch list will be filtered. This way, they will see right away if the person they are adding is already on the list.

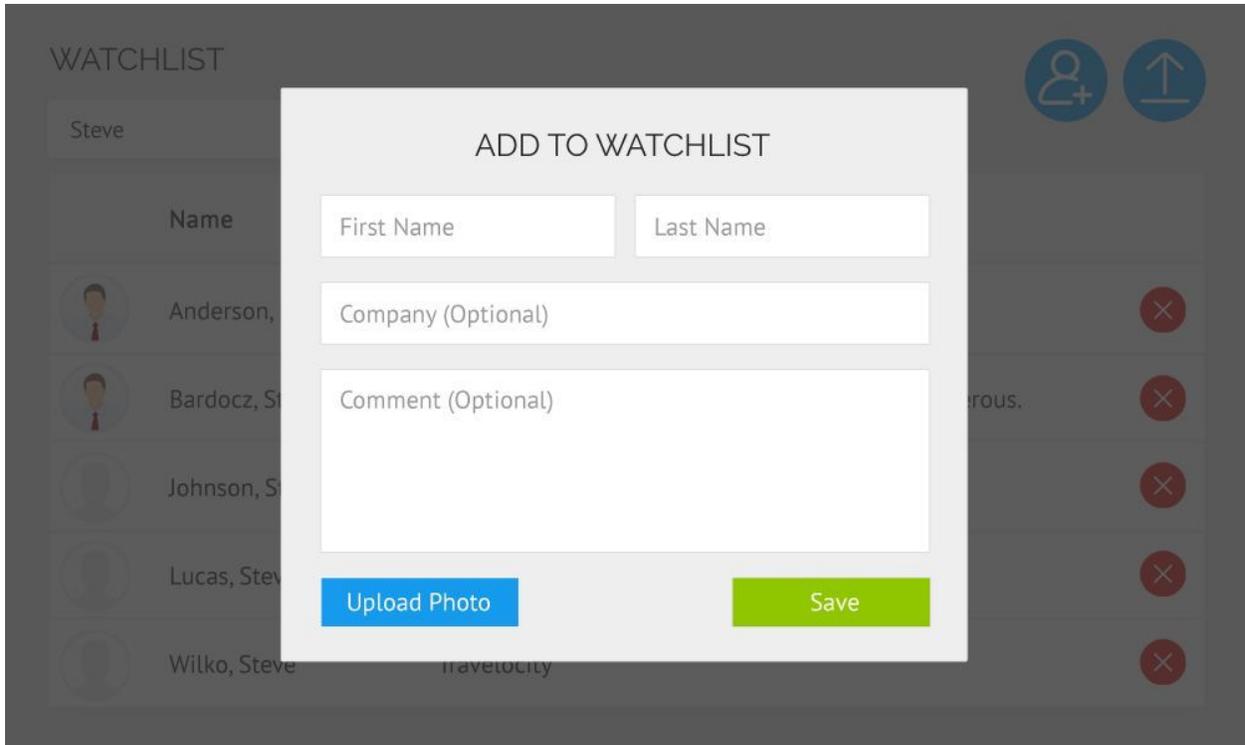
Clicking on the watchlist entry's photo will show it enlarged to its full resolution so identity can be verified.

Clicking on the edit icon next to an individual already on the watchlist will open the Edit Watchlist Entry window

Clicking on the red x icon will allow removal of the person from the watchlist. This should open a strong confirm dialog to make sure this is what the user wants to do and require confirmation.

Clicking the add person icon will open the Add To Watchlist window.

The upload icon will not be added on this spec but is intended to allow uploading of an existing watchlist via spreadsheet like our import wizard



This window is self explanatory. Upload Photo opens a system file explorer window so they can upload a photo of the person. We could open one of those drag windows and allow them to drag or browse as well. I find those to be extremely convenient for dragging photos from my desktop or other locations buried in the User files. I'd like to add that in. I'm sure it's easy to do with Angular and HTML5.

 **POSSIBLE MATCH DETECTED**

You entered the name of a previous visitor. Please review the possible matches below to make sure the person you are adding is not already in the database. Simply click on a person to view their details. If a visitor record belongs to the person you are adding, click the Use Existing button. If there is no match, add new person.

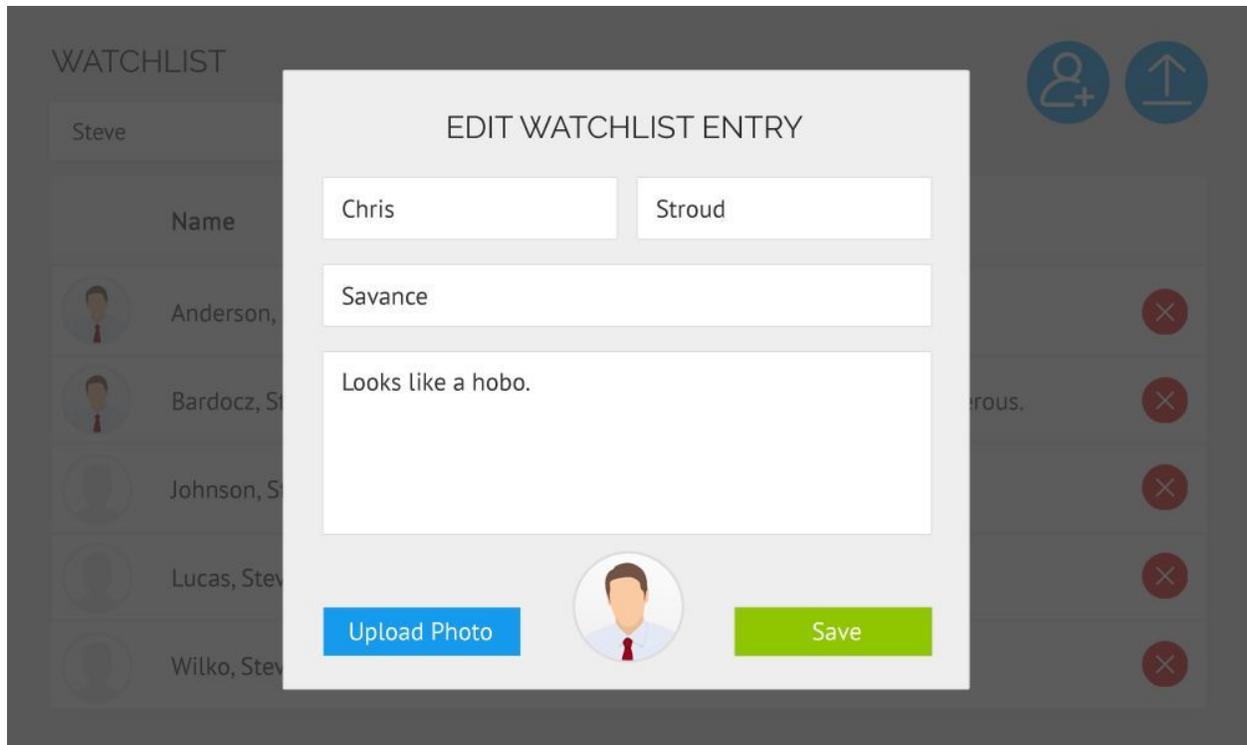
	Bardocz, Steve	Savance	Add New
---	----------------	---------	-------------------------

POSSIBLE MATCH(ES)

	Bardocz, Steve	Microsoft	Use Existing
	Bardocz, Steve	Savance	Be careful. Person very dangerous. Use Existing

[Cancel](#)

If the search finds any record in the database that matches the person's name exactly this window will open asking them to verify whether or not it is the same person by choosing to add a new person or use one of the existing records that was found. This will search active and disabled staff and patients as well as previous visitors. Adding a disabled contact to the watchlist does not enable them. Disabling a contact that is on the watchlist does not remove them from the watchlist.



This window is basically the add watchlist window but with the person's photo displayed. Hovering over the photo will temporarily enlarge it so it's easily viewed. Upload will do the same thing it does on the Add New window. IF THE NAME IS CHANGED then Save should search the database for a match again like it does when adding a new person. If the name is not changed that search should be skipped and other changes should be saved.

Manned Visitor Management

FIND OR ADD VISITOR

First Name:

Steve

Last Name:

Carlson

Company:

Google

Pre-Register Visitor?

YES

NO



Top Result(s)



Carlson, Steve
Google

Possible Matches



Carlson, Carl
Google



Anderson, Steve
Google

New Visitor



ADD AS NEW VISITOR

Next

The most difficult thing we had to discuss in design meetings was how this search will work. It's basically going to work the same way the search does in the Add-Patient window of health accounts but use Company instead of DOB.

Anytime there is a top result it is always selected unless there is no exact match in which case ADD AS NEW VISITOR will be selected

FIRST, LAST and COMPANY ENTERED

If the user enters First, Last and Company and any record exists that matches all three exactly then that record will go into Top Result(s). Other matches to two fields will be shown in Possible Matches with this priority: 1. First and Last 2. Last and Company 3. First and Company

ONLY COMPANY NAME ENTERED

If only company name is entered, it should search for all the contacts that match that company and show all those results. Possible matches should not be shown, only search results.

ONLY FIRST NAME ENTERED

If only first name is entered, it should search for everyone with that first name. Possible matches should not be shown, only search results.

ONLY LAST NAME ENTERED

If only last name is entered, it should search for everyone with that last name. Possible matches should not be shown, only search results.

ONLY FIRST AND LAST NAME ENTERED

If only first name and last name are entered, it should search for everyone with that that first name and last name and show those results in the search results. Possible matches should include anyone with the same first name or anyone with the same last name - no matter which company they work for.

ONLY FIRST NAME AND COMPANY

If only first name and company name are entered, it should search for everyone with that that first name and company and show those results in the search results. Possible matches should include anyone with the same first name or anyone with the same company name - no matter which last name they have.

ONLY LAST NAME AND COMPANY

If only first name and company name are entered, it should search for everyone with that that first name and company and show those results in the search results. Possible matches should include anyone with the same first name or anyone with the same company name - no matter which last name they have.

FIND OR ADD VISITOR

First Name:	<input type="text" value="Steve"/>	Last Name:	<input type="text" value="Carlson"/>
Company:	<input type="text" value="Google"/>		
Pre-Register Visitor?	<input checked="" type="button" value="YES"/>	<input type="button" value="NO"/>	<input type="button" value="Q"/>

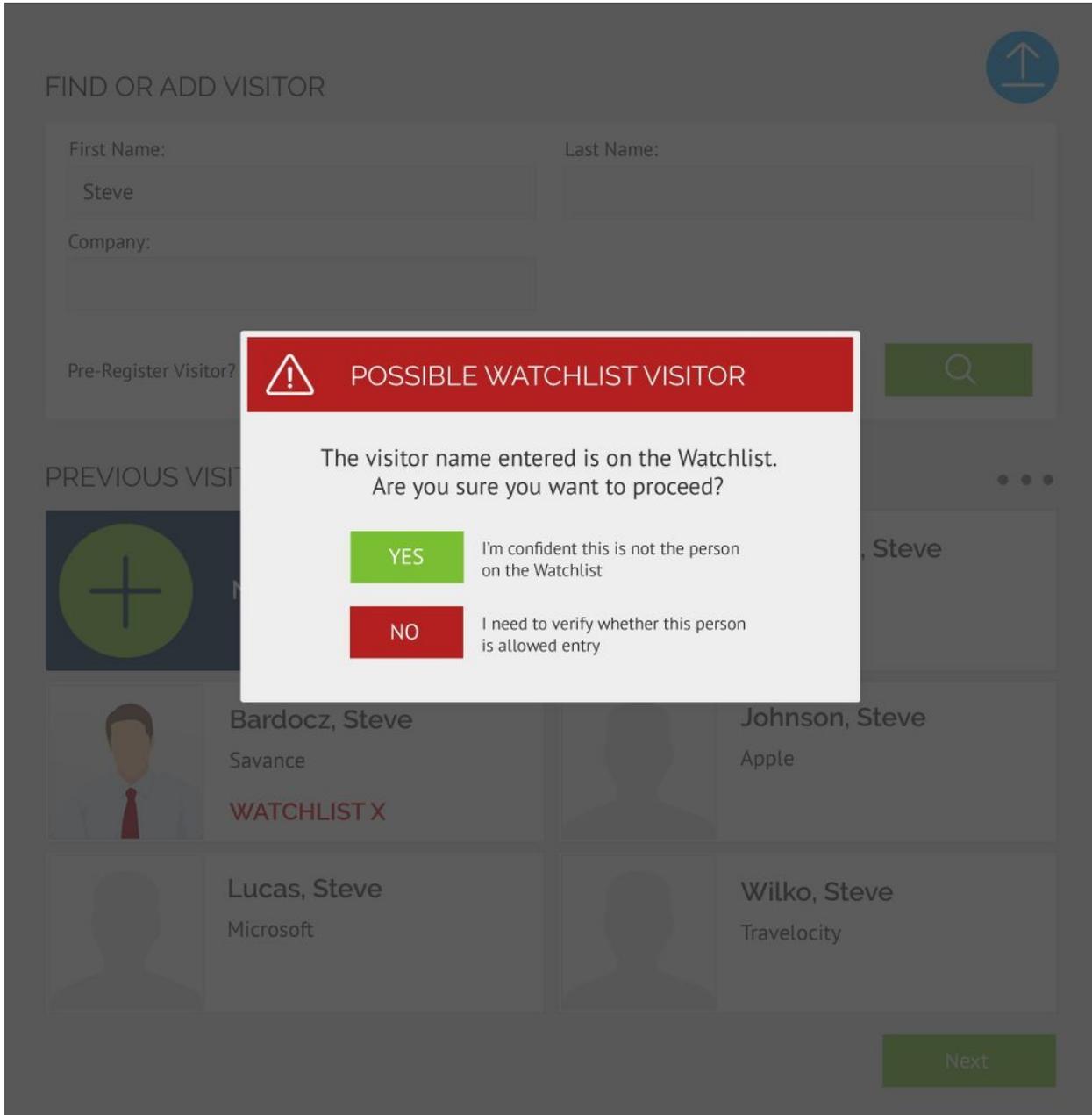
Search Results ☰

	Carlson, Steve	Google	
	Carlson, Steven	Google	 WATCHLIST X
Possible Matches			
	Carlson, Carl	Google	
	Anderson, Steve	Google	
	Smith, Steve	Google	 WATCHLIST X
New Visitor			
	ADD AS NEW VISITOR		

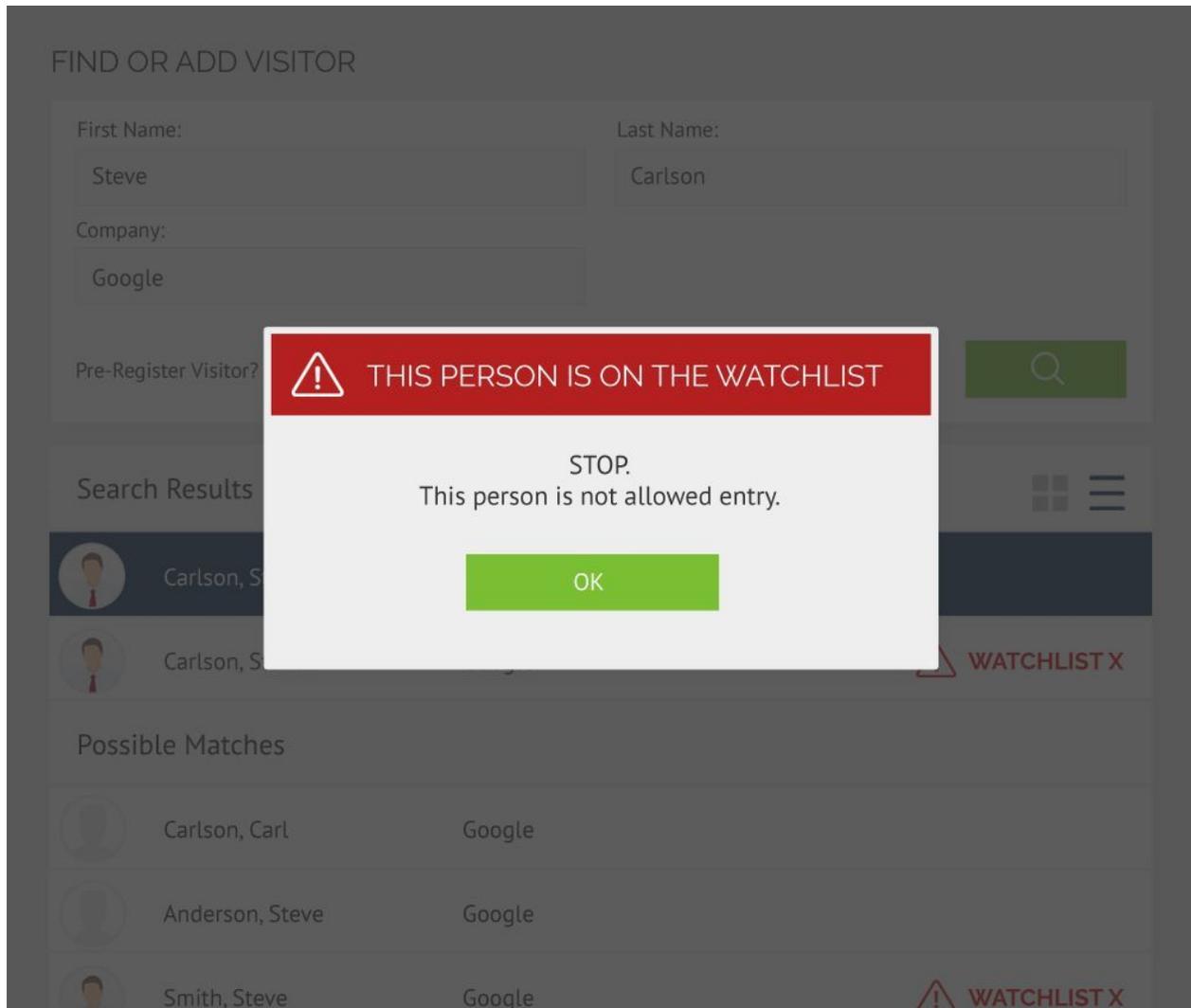
The different sections of search results will each populate in their own scroll views. This goes for both the list and card view. This way the New Visitor will always remain at the bottom, but always be visible and if either category (or the entire list if a search without results categories) is too long to view the user can scroll through it without losing sight of the other sections.

Upon hitting Next on this window a check against the watchlist occurs in the background. This check verifies the name being entered to determine if it matches anyone on the watchlist. It

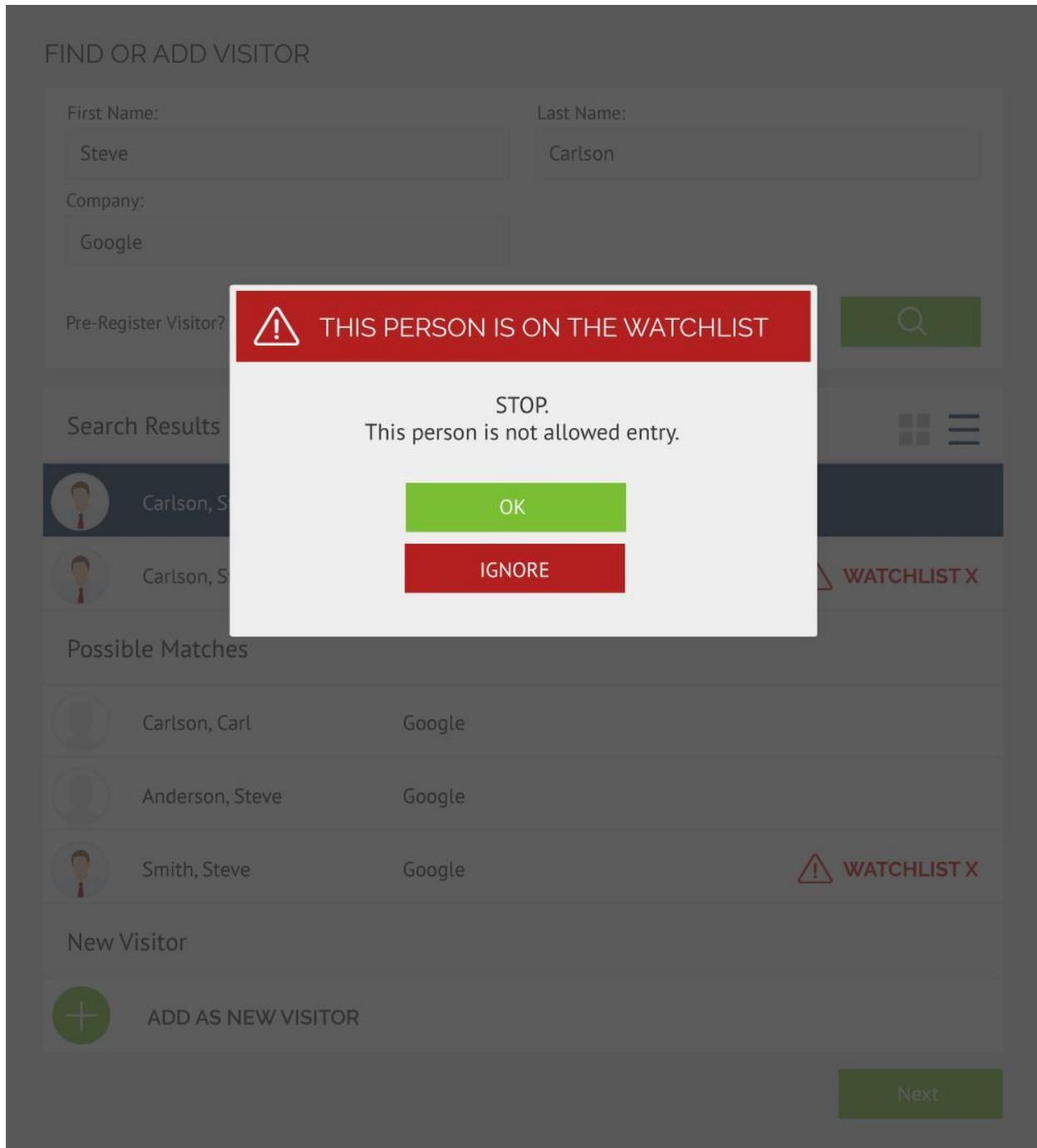
checks this by running a search against all users, visitors and patients with a watchlist column value of 1 including disabled users because a former employee could be on the watchlist. If any name matches a record on the watchlist exactly there are a few different pop-ups that could fire.



If New Visitor is selected when Next is clicked and the name entered matches any name on the watch list exactly then this window will show up.



If a user who is not an Administrator and does not have the Bypass Watchlist Permission selects a person from the search results who is clearly marked as being on the watchlist and clicks Next this window will show up. Clicking ok will simply close the window and go back to the search results.



Administrators and anyone with the Bypass Watchlist Permission will see this window if they select a Watchlist person from the search results and click next. If they click ignore they will simply move forward with signing the person in as normal.

Visitor Host

Company host for this visit:

Questions

What visitor category does person belong to?

Contractor



What is the purpose of visit?

Switch out the hallway light bulbs

What is visitor's favorite food?

Sushi

What is the visitor's email address?

carlcarlson@abccompay.com

Visitor Picture

**THE CANCEL BUTTON SHOULD BE THE SAME COLOR AS THE BACK BUTTON ON ALL SCREENS**

Once the Watchlist check has been passed the user will come to the questions screen. The logic for pulling the questions from the database and populating this screen will be much like it is in the Kiosk. Use the active question profile's profile sys to pull all the questions belonging to that profile from the Questions table and dynamically populate them here. The difference is that regardless of what question order the Kiosk is set with we will always have "Who are you here to see?" at the top and Visitor Picture at the bottom. The question will be on the left and answers in the proper formats on the right. Custom Options will always display as drop downs. The "Show answers as buttons" property of custom fields will be ignored here.

Pre-Registration Details

Email Address:

Phone Number:

Start Date & Time:

End Date & Time:

Visitor Host

Company host for this visit:

[Select Host](#)

Additional Information

What visitor category does person belong to?

What is the purpose of visit?

What is visitor's favorite food?

What is the visitor's email address?

Visitor Picture

[Upload Photo](#)[Take New Photo](#)[Cancel](#)[Back](#)[Next](#)

If YES is selected on the first screen for pre-registration then fields for pre-registration will be available above the Visitor Host section of the Questions screen. None of these fields are required but can be used. The rest of the sign in process will be governed by the questions the same as a non-pre-register guest.

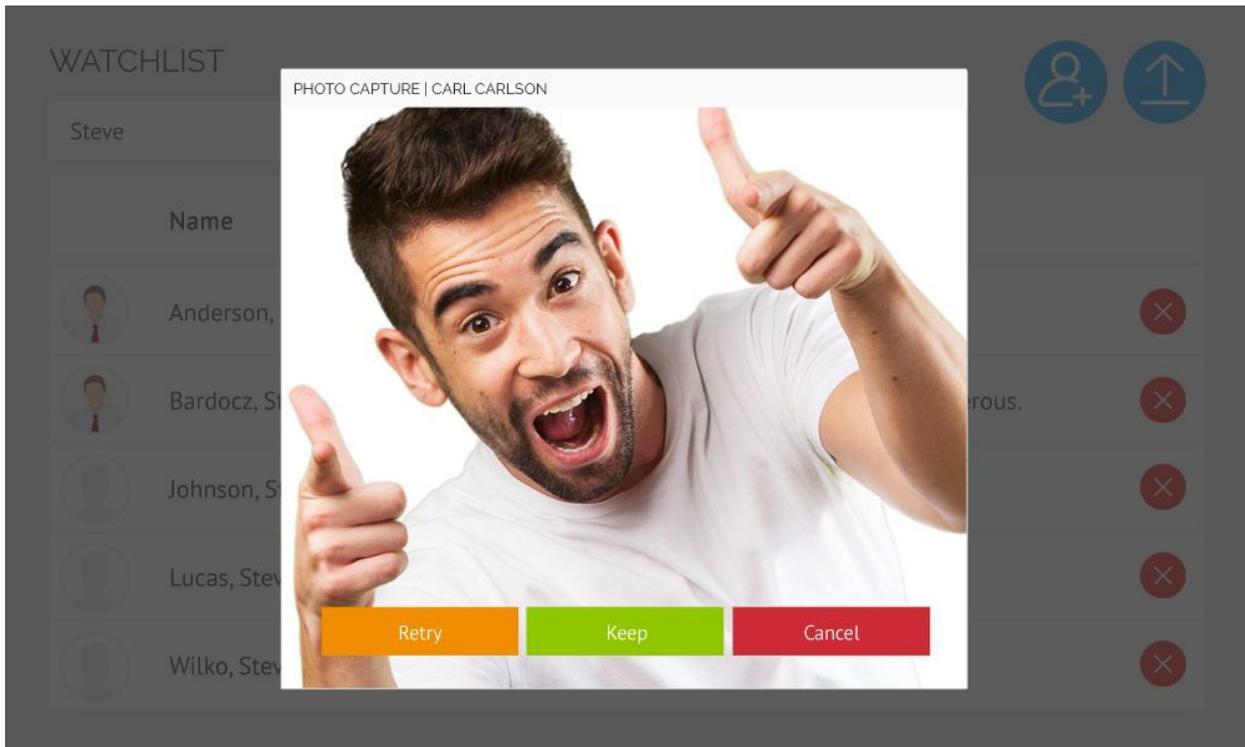
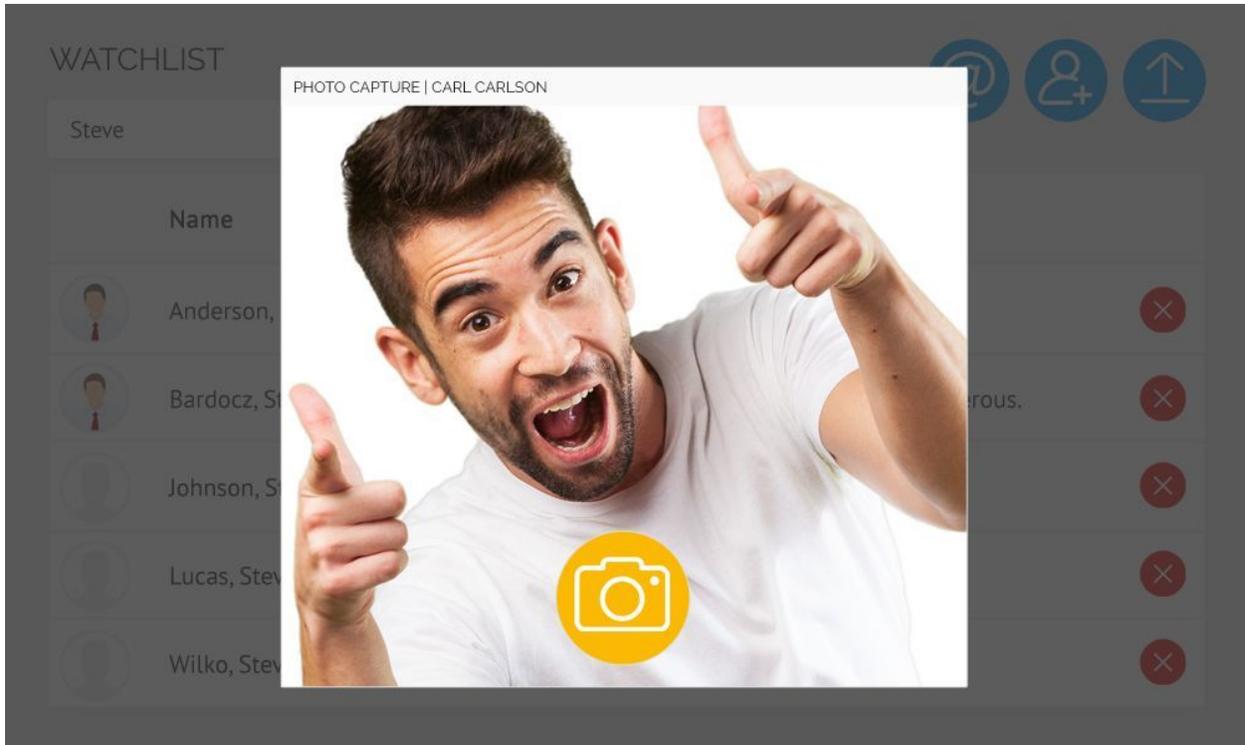
SELECT VISITOR HOST

Type Name to Narrow Down Results



 Arun Gopalakrishnan	 Jason Curley	 Megan Draper
 Beth Scheda	 Jason Plasencia	 Nick Lochner
 Casey Crookston	 Jason Springart	 Robert Joseph
 Chris Stroud	 Judah Ganesh	 Sofia McClure
 Denise Ramirez	 Karim Ahmed	 Steve Bardocz
 Dylan Richards	 Michael Renock	 Travis Fleenor

When the Button Select Host is clicked this screen pops up showing the available hosts pictures, names and status (status name in the status color - not shown). The status color should also show up as a colored circle around the profile picture.



The Take New Photo button opens the top photo capture window.

VISITOR CONFIRMATION



CARL CARLSON (NEW VISITOR)

ABC Company

Visitor Category: Contractor
Purpose of Visit: Switch out the hallway light bulbs
Favorite Food: Sushi
Email Address: carlcarlson@abccompany.com
Eye Color: Blue
Height: 6"

Visitor Host

Company host for this visit: Mary Brown

Pre-Registration Info:

Planned arrival date: October, 31, 2018

Labels & Badges:

YES

NO

I need to print or activate a badge or label for this visitor

Cancel

Back

Confirm

VISITOR CONFIRMATION



CARL CARLSON (NEW VISITOR)

ABC Company

Visitor Category: Contractor
Purpose of Visit: Switch out the hallway light bulbs
Favorite Food: Sushi
Email Address: carlcarlson@abccompany.com
Eye Color: Blue
Height: 6"

Visitor Host

Company host for this visit: Mary Brown

Pre-Registration Info:

Planned arrival date: October, 31, 2018

YES

NO

I need to print or activate a badge or label for this visitor

Cancel

Back

Confirm

VISITOR CONFIRMATION



CARL CARLSON (NEW VISITOR)
ABC Company

Visitor Category: Contractor
Purpose of Visit: Switch out the hallway light bulbs
Favorite Food: Sushi
Email Address: carlcarlson@abccompany.com
Eye Color: Blue
Height: 6"

Visitor Host

Company host for this visit: Mary Brown

Pre-Registration Info:

Planned arrival date: October, 31, 2018

Badge/Label YES NO

Cancel

Back

Confirm