Optional Configuration

The software offers a full list of optional settings that can be used to tailor the registration and other processes to your own needs. This guide will take a brief tour of each setting offered by the software.

**Jolly Server Settings**
These are global settings that span multiple visitor groups and change behavior throughout the software for all workstations connected to the same Jolly Server database. Follow the below steps to access these settings:

1. Select the ‘Setup’ button:

2. Select the ‘Configure Jolly Server Settings’ button:

**Jolly Server**
Configure global settings saved in the Jolly Server such as visitor groups, locations, log options, user accounts, e-mail notifications, and more.

**Visitor Groups**
The ‘Visitor Groups’ category allows you to create new groups, edit existing groups, and delete unnecessary groups.
New
This option creates a new group and opens the ‘Visitor Group Properties’ to change settings for the new group. See the ‘Visitor Group Properties’ section for details.

Edit
This option opens the ‘Visitor Group Properties’ to change settings for the selected group only. See the ‘Visitor Group Properties’ section for details.

Delete
This option deletes the group as well as all log data associated with the group. If you need to keep the log data, it is advised that you do not delete the group and hide it instead. To hide a group, see the ‘Visitor Groups’ subsection of the ‘Workstation Options and Devices’ section.

Locations
The ‘Locations’ category allow you to create and manage “physical” locations for workstations. Each location can be configured with different settings to suit their real-world usage.
Note: Multiple workstations can share a location such as ‘Reception Desk’ and can then keep
the same settings. However, this feature can only synchronize settings if an external database
(such as the Jolly Server) is used to store logs and program settings.

New
This option creates a new “physical” location and opens the location settings window. See the
‘Location Settings’ subsection below for details.

Edit
This option opens the location settings window to edit settings for the selected location. See
the ‘Location Settings’ subsection below for details.

Delete
This option deletes the “physical” location as well as all log data associated with the location. If
you need to keep the log data, it is advised that you do not delete the location and simply
ignore it.
Location Settings

Location Name
The name of the “physical” location as it will appear in the ‘Workstation Options and Devices’ window.

Location Description
A message to describe the “physical” location; this can be used to summarize the intended policies of the location.

Weekend
These settings tell the software what days should NOT allow access.

Logs And Reports
The ‘Logs And Reports’ category allows you to manage log cleanup and the software’s ‘Evacuation Report’ feature.
General Log Cleanup

These options let the software know a maximum number of days to keep log entries or a maximum number of log entries to keep. Selecting the ‘Clean Up Now’ button will delete log entries following the rules that have been set.

Note: Older log entries will be deleted before new entries.

Time and Attendance Log Cleanup

These options let the software know a maximum number of days to keep time and attendance entries or a maximum number of time and attendance entries to keep. Selecting the ‘Clean Up Now’ button will delete time and attendance entries following the rules that have been set.

Note: Older time and attendance entries will be deleted before new entries.
**Evacuation Report**

These options configure the ‘Evacuation Report’ feature of the software. Selecting the ‘Configure’ button will open the ‘Evacuation Report Log Setup’ window.
Save Log As
This option tells the software what to name the evacuation report when it is generated.

Log Description
A message used to describe the evacuation report; this can be used to summarize the intended settings of the evacuation report.

Visitor Groups
This option narrows the evacuation report to include only selected visitor groups or all groups.

Locations
This option narrows the evacuation report to include only selected locations or all locations.

Display Columns
This option narrows the evacuation report to include only selected database fields or all database fields.
**Security Policy**
This category allows you to manage e-mail and print document security.

**Sign document with digital key**
This option tells the software to sign all e-mailed documents with a provided digital key. This option helps to prevent e-mailed logs, reports, and record data being used outside the company.

**Overlay document with watermark**
This option tells the software to overlay all printed documents with a provided watermark. This option helps to ensure authenticity of printed documents.

**E-mail Notifications**
This category allows you to manage e-mail settings used by the software. Any groups that use e-mail notifications will use the provided settings when sending an outgoing e-mail. See your System or Network Administrator for assistance with these settings.
User Accounts
This category allows you to manage access to the software. This can be used to ensure that software users cannot change settings within the software and can ensure that only authorized personnel can view logs and record data.
Add
This option creates a new user for the software and will open the user account settings window. See the ‘User Account Settings’ subsection below for details.

Modify
This option opens the user account settings window to change settings for the currently selected user account. See the ‘User Account Settings’ subsection below for details.

Delete
This option deletes the currently selected user account.

Note: The ‘Administrator’ account cannot be deleted.

Groups
This options allow you to modify the groups that user accounts can be assigned to and will open the ‘User Groups’ window. See the ‘User Groups’ subsection below for details.
**Active Directory Connection Settings**

This option will allow users to be logged on via Active Directory to keep passwords synchronized with the user’s Windows password. Selecting the ‘Connection Settings’ button will open the ‘LDAP / Active Directory Settings’ window. You may use the ‘Auto Detect’ button in that window to configure settings however, you may need to see your System or Network Administrator for assistance with these settings.
**User Account Settings**

![User Account Settings window]

**Full name**
This setting is for the name of the user to be displayed in the log for actions performed by the user.

**User name**
This setting is for the name of the user to be used for logging in and should not contain spaces.

**Groups**
These options tell the software what groups the user belongs to and what access they then have within the software.

**Verification Method**
This setting tells the software how it should check the user’s password. You can set the software to check an internal password, the user’s Windows (Active Directory) password, or either of the two.

**Password**
An internal password for the user account for the software only.

**Active Directory**
The user name used by Active Directory as well as connection override settings. See your System or Network Administrator for assistance with these settings.
**User Groups**

*New*
This option allows you to create a new user group and will open the ‘User Group Properties’ window. See the ‘User Group Properties’ subsection below for details.

*Edit*
This option allows you to change the settings for a user group and will open the ‘User Group Properties’ window. See the ‘User Group Properties’ subsection below for details.

*Delete*
This option deletes the currently selected user group. This will not delete the users in the group but will remove the access that users received as a member of the group.
User Group Properties

Select the roles from the below list:

Administration
- Allow global setup
- Allow workstation setup

Logs And Reports
- Allow to view reports
- Allow to manage logs
- Allow to manage attendance data

Data Management
- Allow to add records
- Allow to modify records
- Allow to delete records

Miscellaneous
- Allow to design
- Allow to print

[Ok] [Cancel] [Help]
Name
This setting is for the name of the user group to appear as an option when selecting the groups a user can be a part of.

Description
A message used to describe the user group; this can be used to summarize the intended settings of the user group.

Roles
These settings control the privileges that users receive when they are part of the group. These settings are general self-explanatory and will not be enumerated here.

Visitor Groups
This setting narrows the user group to only be able to view and work with selected visitor groups or all visitor groups.

Workstation Options and Devices
These are settings that span multiple visitor groups and change behavior throughout the software for the current workstation only. Follow the below steps to access these settings:

1. Select the ‘Setup’ button:
2. Select the ‘Configure Workstation Settings’ button:

Workstation Options and Devices
Configure settings that apply only to this workstation such as allowed tasks, local devices, and more.

Configure Workstation Options

Location
This setting allows the “physical” location to be selected and the corresponding location settings to be loaded. See the ‘Locations’ subsection in the ‘Jolly Server Settings’ section for details.

Auto Synchronize
Selecting the ‘Auto Synchronize’ button will open the ‘Workstation Synchronization Settings’ window. These settings control if and how often the workstation will check for updated group settings from a shared Jolly Server.
Visitor Groups
This setting narrows the workstation to only be able to view and work with selected visitor groups or all visitor groups.

Tasks
These settings narrow the workstation to only be able to perform selected tasks. Selecting the blue, underlined text will open the settings window for that task or selecting the ‘Configure’ button will open a window with a tab for each task. You can also select the task that will be started by default when the software is opened.
Main Menu

Show group image on Main Menu
This option allows each group to display an image next to the task buttons on the main menu. The image must be configured in the group properties. See the ‘Group Properties’ section for details.

Background color
This option allows a single color to be used as the background for all screens.

Note: This will be overridden by the welcome screen image where the applicable option has been set.

Set welcome screen image
This option allows a single image to be used as the background for the main menu. Selecting the ‘Select’ button opens a dialog to select the image, selecting the ‘Apply to all screens’ option will apply the welcome screen image to all screens and will override the background color setting. You may also select the image scaling option best suited to your image.
Enable on-screen keyboard
This option enables a virtual keyboard that can be opened from any screen from a button in the bottom-right corner of the screen. You may also uncheck the ‘Allow users to hide the on-screen keyboard’ option to prevent the keyboard from being closed.

Enable kiosk mode
This option enables the ‘kiosk mode’ feature which is intended for self-service stations. This mode prevents users from accessing settings, closing the program, or switching to other applications. You may also set the software to start in this mode by selecting the ‘Always start in kiosk mode’ option.

Registration
![Registration Settings]
*Task will only be performed if configured in visitor group settings.
**Allow Registration**
This option turns the ‘Registration’ feature on and off for the workstation. This option can also be set from the ‘Tasks’ section of the ‘Workstation Options and Devices’ window.

**Enable Card Scanner**
This option allows the workstation to use a card scanner such as a ScanShell / SnapShell device to capture information from IDs, Business Cards, and Passports. Selecting the ‘Scanner Options’ button will open the ‘Card Scanner’ window to configure settings.

Note: Individual groups must be set to scan a driver’s license, ID, business card, or passport during registration. See the ‘Registration’ subsection of the ‘Group Properties’ section for details.

Note: Not all scanners are supported. See the list of supported scanners on jollytech.com for details.
Scanner Type
This option allows you to select the type of scanner that is being used. We currently support ScanShell / SnapShell devices as well as 2D barcode and magnetic stripe readers.

Calibrate Scanner
This option is used to focus the internal camera for better character recognition.

Scan driver's licenses and ID cards
This option allows the workstation to scan driver’s licenses and ID cards to collect information during registration.

Note: You should inspect the information collected from driver’s licenses and IDs before finishing registration. Scuffs and imperfections on the card can cause incorrect results.
Scan passports
This option allows the workstation to scan passports to collect information during registration.

Note: You should inspect the information collected from passports before finishing registration. Scuffs and imperfections on the passport can cause incorrect results.

Scan business cards
This option allows the workstation to scan business cards to collect information during registration.

Note: You should inspect the information collected from business cards before finishing registration. Scuffs and imperfections on the passport can cause incorrect results.

Enable auto-feed
This option enables the auto-feed feature available on some scanner models. See the documentation for the scanner to determine if this setting is appropriate.

Allow users to skip card scanning step
This option allows users to skip the scanning process and enter all information manually. This option may be unchecked to require card scanning before proceeding.
Scanner is connected to COM Port
This option tells the software to look for the scanner on a COM/Serial port. See the scanner documentation for setting details.

Enable Camera
This option allows the workstation to use a webcam or camera to capture images. Selecting the ‘Camera Options’ button will open the ‘Camera / Webcam’ window to configure settings.

Note: Individual groups must be set to capture a photo during registration. See the ‘Registration’ subsection of the ‘Group Properties’ section for details.

Note: Not all cameras are supported. See the list of supported cameras on jollytech.com for details.
Allow users to skip photo acquisition
This option allows users to skip the photo capture process. This option may be unchecked to require photo capture before proceeding.

Allow users to browse for photo files on disk
This option allows users to select a photo saved on the computer rather than taking a photo.

Allow users to manually crop and enhance photos
This option allows users to modify the photo dimensions, brightness, and color settings manually. This may yield better photos but will take more time.
Automatically crop photos around face
This option allows the software to automatically detect faces and crop the photo to the surrounding area. Selecting the ‘Configure’ button will open the ‘Face Crop Settings’ window to configure settings.

![Face Crop Settings window](image)

**Width-to-height ratio**
This option determines the ratio of the dimensions of the photo.

**Crop box size**
This option determines the base dimension to which the width-to-height ratio is applied.

**Detection accuracy**
This option determines the level of processing used by the software to find a face.

**Enable Signature Pad**
This option allows the workstation to use a signature pad to capture a signature. Selecting the ‘Signature Pad Options’ button will open the ‘Signature Pad’ window to configure settings.
Allow users to skip signature acquisition
This option allows users to skip the signature capture process. This option may be unchecked to require signature capture before proceeding.

Allow users to manually crop and enhance signatures
This option allows users to modify the image dimensions, brightness, and color settings manually. This may yield better images but will take more time.

Enable Fingerprint Pad
This option allows the workstation to use a fingerprint pad to capture a fingerprint. Selecting the ‘Fingerprint Options’ button will open the ‘Fingerprint Reader’ window to configure settings.
Allow users to skip fingerprint acquisition
This option allows users to skip the fingerprint capture process. This option may be unchecked to require fingerprint capture before proceeding.

Allow users to manually crop and enhance fingerprints
This option allows users to modify the image dimensions, brightness, and color settings manually. This may yield better images but will take more time.
Find Record

This option turns the ‘Find Record’ feature on and off for the workstation. This option can also be set from the ‘Tasks’ section of the ‘Workstation Options and Devices’ window.

Allow Today’s List
This option turns the ‘Today’s List’ feature on and off for the workstation.

Note: The ‘Today’s List’ must be configured in the group properties. See the ‘Record Lookup’ subsection of the ‘Group Properties’ section for details.
Check In / Out

Automatically check in or out based on current status
This option allows the software to choose whether to check in a visitor or check out a visitor based on the visitors check in / out records.

Allow Check In
This option turns the ‘Check In’ feature on and off for the workstation.

Allow Check Out
This option turns the ‘Check Out’ feature on and off for the workstation.

Play sound for each attempted check in / out
This option turns the success / failure sound for check in / out on or off for the workstation.

Allow record IDs to be imported from file or device
This option allows IDs to be loaded from a file or barcode reader in ‘Check In / Out’ by selecting the ‘More Options’ button.
**Send command to unlock entry point**
This option allows the software to operate a turnstile or other entry control gate. Selecting the ‘Configure’ button will open the ‘Turnstile Control Settings’ window. See the documentation for your entry control gate for settings.

![Turnstile Control Settings window](image)

**Automatically check everyone out at:**
This option tells the software to check out all visitors that are still checked in at a specified time.

Note: The computer must be powered on, cannot be in standby / sleep mode, and must be running the software for check out to occur. Missed check outs will not be performed at next startup.

**Listen and process badge scans in the background**
This option tells the software to listen for barcode reader or magnetic stripe reader activity at any time. Selecting the ‘Configure’ button opens the ‘Background Scan Settings’ window. See the documentation for your reader to determine appropriate settings.
Note: Enabling this feature does not automatically mean that the behavior will be supported. Most readers will also have to be programmed to enable background scanning mode. See the documentation for your reader for details.
Logs and Reports

Allow Report Center
This option turns the ‘Report Center’ feature on and off for the workstation. This option can also be set from the ‘Tasks’ section of the ‘Workstation Options and Devices’ window.

Allow Record Queries
This option turns the ‘Query Record’ feature on and off for the workstation. This feature allows SQL style queries to be run to find records in the ‘Report Center.’

Allow Evacuation Report
This option turns the ‘Report Center’ feature on and off for the workstation.

Limit the report to check in activity that occurred within the last 24 hours by default
This option narrows the ‘Evacuation Report’ to the last 24 hours by default. This behavior can be enabled and disabled from the ‘Evacuation Report’ at any time.
**Printer Options**
Selecting the ‘Printer Options’ button opens the Report Printer options. See the ‘Report Printer’ subsection below.

**Print**

**Default Printer**
These settings set print options for printing badges. The options within this window are standard printer options and should be set to match your own circumstances. See your System Administrator for assistance with these settings.
**Report Printer**

These settings set print options for printing logs and reports. The options within this window are standard printer options and should be set to match your own circumstances. See your System Administrator for assistance with these settings.

![Workstation Device Settings](image)

Configure the printer that will be used to print reports and other documents at this workstation.

- **Printer**: Canon MF8300 Series UFRI LT
- **Printer Type**: Windows Compatible Printer
- **Paper Size**: Letter
- **Paper Tray**: Drawer 1
- **Paper Type**: Plain Paper

[Ok] [Cancel] [Help]
Record Center

Allow Record Center
This option turns the ‘Record Center’ feature on and off for the workstation. This option can also be set from the ‘Tasks’ section of the ‘Workstation Options and Devices’ window.

Language
This setting controls the display language that is used within the software. Selecting the ‘Customize’ button will allow translations to be adjusted if necessary.
Load/Store Profile
The settings for the workstation can be stored in a profile that will be stored in the database. All workstations that are connected to the same database can then load the profile from the database for faster configuration.

Group Properties
These are settings that span a single visitor group and change behavior throughout the software for all workstations connected to the same Jolly Server database. Follow the below steps to access these settings:

1. Select the visitor group to be modified:

   Visitor Group: Employees

2. Select the ‘Properties’ button:

   Visitor Group: Employees
**Group Name**
This setting determines the name of the group as it will be shown in the group selection dropdown menu on the main menu.

**Picture**
This setting determines the image that will appear to the right of the task buttons on the main menu. An image can be selected or you can generate a preview of the group badge by selecting the ‘Generate’ button.
Visitor Database
This setting corresponds to the database and table that stores record data for the group. This can be configured by selecting the ‘Configure’ button. See the ‘Choose a Record Database’ guide for details.

Edit Record Layout
The record layout determines how record data is displayed in registration and the record center as well as formatting options for the data. See the ‘Changing Data Fields or the Record Layout’ guide for details.

Allow user to select the records to load in Record Center – suggested for large databases
This option tells the software to ask the user for a subset of records to load from the record center. The default setting loads all records and could take longer periods of time for large databases. This option is recommended if the number of records is very large.

Enable automatic group selection
This option allows the software to determine the appropriate group for a visitor when entered at check-in. In order to function properly, all groups must have a unique identifier in the field being used for identification.

Hide sensitive visitor data in Kiosk Mode
This option prevents sensitive information from being visited when the workstation is in Kiosk Mode. Selecting the ‘Configure’ button opens the ‘Select Fields to Show in Kiosk Mode’ to configure settings.
Select Fields to Show in Kiosk Mode

Protect sensitive data by limiting the record fields that are shown when the application is run in Kiosk mode. Kiosk mode can be enabled in Workstation Options.

- [ ] Show All Fields
- [ ] FirstName
- [ ] LastName
- [ ] Title
- [ ] Department
- [ ] Location
- [ ] Building
- [ ] PhoneNumber
- [ ] Email
- [ ] HireDate
- [ ] TerminationDate

[Ok] [Cancel] [Help]
**Unique Record Identifier Field**
This setting determines the identifier that is used in the ‘Find Records,’ ‘Check In,’ and ‘Check Out’ tasks. This field should be unique to each visitor.

**Information Fields 1-4**
These fields are optional and allow records to be located by providing alternate information about the visitor in the absence of the unique identifier.

**Enable Today’s List**
This feature will check the arrival date of registered visitors and puts them in the ‘Today’s List’ on the main menu automatically for easy lookup. Selecting the ‘Configure’ button opens the ‘Today’s List Settings’ window to configure settings.
**Today's List Settings**

Map each field to a corresponding database field. The fields will be used to determine which records to display and to store the arrival status.

- **Arrival Date**
  - Select the database field that contains the date that a visitor is expected to arrive.
  - HireDate

- **Location**
  - Select the database field that contains the name of the location where a visitor is expected to arrive.
  - Building

- **Arrival Status**
  - Select a database field to store the latest check in / out status.

**Advanced Options**

Configure the advanced options for Record Lookup.

- [ ] Mask ID number input (characters will be replaced with * symbol)
- [ ] Use strict matching – all information fields must be complete
- [X] Allow user to select from multiple matches
- [X] Allow user to select from a list of records
- [X] Show activate card button
- [X] Show deactivate card button
Initialize record with default values
This option may not be deselected. This option allows default values to be set for each field when starting registration. Default values can also be set in the record layout. See the ‘Edit Record Layout’ subsection found in the ‘Group Properties’ > ‘General’ section for details regarding this alternate process. Selecting the ‘Configure’ button opens the ‘Default Record Value Settings’ window to configure settings.
Check for duplicate Records
This option tells the software to check for pre-existing records during the registration process. This gives the user the option of using the old record, the new record, or merging the records. Selecting the ‘Configure’ button opens the ‘Duplicate Record Check Settings’ window to configure settings.

Duplicate Record Check Settings
During registration, the software can detect when a similar record already exists in the database. Configure the record fields that will be used to search for matching records already in the database.

Matching Record Fields

FirstName
AND
LastName
AND
PhoneNumber
AND
**Lookup host information**
This option allows host lookup to be used during the registration process to include information in their record about the person they have come to see. Selecting the ‘Configure’ button opens the ‘Host Lookup Settings’ window to configure settings. See the ‘Host Lookup’ guide for details.

**Scan a driver’s license, ID card, passport, or business card**
This option allows the software to collect information from selected media to make the registration process quicker. Selecting the ‘Configure’ button opens the ‘Card Scanner Settings’ window to configure settings. Selecting the ‘Auto Map Fields’ button will map fields that the scanner is able to read. Occasionally fields may need to be mapped manually depending on the naming structure of the fields.

![Card Scanner Settings](#)

**Take photo**
This option allows a photo to be captured during the registration process. Selecting the ‘Configure’ button opens the ‘Photo Capture Options’ to configure settings. Storing photos directly in the database is self-explanatory; see the ‘Configuring Photos to be saved to a Folder’ guide for details regarding storing the photos outside the database.
Require visitor approve a Non-disclosure Agreement
This option displays a given agreement during the registration process that must be approved by the visitor to proceed. Selecting the ‘Configure’ button opens the ‘Non-Disclosure Agreement Settings’ window to configure settings. See the ‘Adding a Non-disclosure Agreement’ guide for details.

Capture signature
This option allows a signature to be captured during the registration process. Selecting the ‘Configure’ button opens the ‘Signature Capture Options’ window to configure settings. See the ‘Configure Fingerprint/Signature Capture’ guide for details.

Scan fingerprint
This option allows a fingerprint to be captured during the registration process. Selecting the ‘Configure’ button opens the ‘Fingerprint Capture Options’ window to configure settings. See the ‘Configure Fingerprint/Signature Capture’ guide for details.

Note: Fingerprints are not used by the software during the check in process. Capturing a fingerprint is for reference use only.

Check visitor against watch list
This option allows new registrations to be checked against a watch list. The list can be stored in a private database, an online provider database, or both. Selecting the ‘Configure’ button opens the ‘Watch List Manager’ window to configure settings. See the ‘Watch List’ guide for details.

Link card to access control system
This option allows the software to integrate with supported access control systems. Selecting the ‘Configure’ button opens ‘Access Manager’ window to configure settings. Each access control system has different settings, see your System Administrator for assistance with these settings.
Post-Registration Actions
These options determine behavior after the registration process has been completed. See the ‘Setting-Up Rules’ guide for details about updating a record after registration and setting e-mail conditions. See the ‘Using a Database Field in Text’ guide for details about forming personalized text in the e-mail.
Post-Registration Actions

Configure the actions that are performed after the Registration task finishes.

- Update record
- Send e-mail notification
- Automatically print badge in background
- Show print button on confirmation screen
- Automatically check in visitor after registration
- Show check in button on confirmation screen
- Automatically activate card in access control system after registration
- Show activate card button on confirmation screen

[OK] [Cancel] [Help]
**Badge Printing**

**Issue badges to visitors in this group**
This option turns the badge printing feature on or off.

Note: Badge printing is determined by configuration in the ‘Registration,’ ‘Check In,’ and ‘Check Out’ tabs and can also be performed using the ‘Find Record’ task as well as from the ‘Record Center.’

**Edit**
Selecting the ‘Edit’ button will open the badge designer to make changes to the badge design. See the ‘Badge Design’ guide for details.
**Import**
Selecting the ‘Import’ button will allow you to choose a badge design file for printing badges for this group.

**Export**
Selecting the ‘Export’ button will allow you to choose a save location for the current badge design file to be used as a backup.

**Verify print rules**
This option allows rules to be set that must pass before a badge can be printed. See the ‘Setting-Up Rules’ guide for details.

**Update record after print**
This option allows rules to be set for changing a record after printing. One common usage is to increment a counter for the number of badges printed. See the ‘Setting-Up Rules’ guide for details.
Check In

Show form to enter additional information
This option allows a form to be displayed during the check in process for the visitor to enter information. One common usage is to ask the user for a purpose of visit. Selecting the ‘Configure’ button opens the ‘Show Form During Check In’ window to configure settings.
**Update record with provided information before checking rules**
This option tells the software to update the record before checking any rules that have been set for check in. The default setting is to check the rules before updating the record.

**Allow or deny check in when rules are met**
This option allows rules to be set that must be met or must not be met to screen visitors at check in. Selecting the ‘Configure’ button opens the ‘Verify Rules Before Check In’ window to configure rules. See the ‘Setting-Up Rules’ guide for more details.

**Require visitor approve a Non-disclosure Agreement**
This option displays a given agreement during the check in process that must be approved by the visitor to proceed. Selecting the ‘Configure’ button opens the ‘Non-Disclosure Agreement Settings’ window to configure settings. See the ‘Adding a Non-disclosure Agreement’ guide for details.

**Capture signature**
This option allows a signature to be captured during the check in process. Selecting the ‘Configure’ button opens the ‘Signature Capture Options’ window to configure settings. See the ‘Configure Fingerprint/Signature Capture’ guide for details.

**Update record after check in**
This option allows rules to be set for changing a record after check in. One common usage is to increment a counter for the number of times visited. See the ‘Setting-Up Rules’ guide for details.

**Send e-mail notification after check in**
This option tells the software to send an e-mail when visitors have been checked in. Selecting the ‘Configure’ button opens the ‘Check In Notification E-mail Settings’ window to configure
settings. See the ‘Using a Database Field in Text’ guide for details about forming personalized text. See the ‘Setting-Up Rules’ guide for details about setting e-mail conditions.

**Advanced Options**

Note: These options are shared for check in and check out. Changes here will appear in the ‘Check In’ tab and the ‘Check out’ tab.
Check Out
All options within the ‘Check Out’ tab are identical to those found in the ‘Check In’ tab. See the ‘Check In’ subsection for details.
Visitor Group Properties

Steps to Perform During Check Out
Select the steps to perform during the check out process.

- [ ] Show form to enter additional information
- [ ] Update record with provided information before checking rules
- [ ] Allow or deny check out when rules are met
- [ ] Require visitor approve a Non-disclosure Agreement
- [ ] Capture signature
- [ ] Update record after check out
- [ ] Send e-mail notification after check out

Advanced Options

Ok  Cancel  Help
These fields determine what data is stored in the logs when record activities occur. The activity logs have some default values that are always included and these fields allow you to choose which additional fields you would like to be stored.

Note: These fields must be set as you would like them to appear in the logs. Changes to this setup will affect future log entries but will NOT modify past log entries.