



User Guide

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InstaPass

This Manual describes how to install and use the InstaPass software.

Software version:

1.1

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Introduction

This chapter provides an introduction to InstaPass.

The following topics are covered:

- Who is this guide for
- Pre-requisites
- Accessing this guide
- Overview of InstaPass

Who is this guide for

The InstaPass user guide is designed to meet the needs of persons who are responsible for the administration of the application and also the end users who will perform the day to day operation of InstaPass.

Pre-requisites

This User Guide assumes that you are familiar with basic Windows concepts and terminology.

Accessing this guide

- On the Installation CD-ROM in the \Manuals directory
- In the \InstaPass installation directory
- By selecting HELP CONTENTS from the HELP menu
- By Pressing F1 at any time from the main screen
- From the Windows Start menu by selecting:
 - Programs-InstaPass-Help

Overview of InstaPass

InstaPass is a secure ID badge system that allows complete control over all Visitors to your organization. InstaPass can securely sign-in all Visitors, contractors or Employees utilizing Photo ID and Barcoding technology, while recording all visits to allow detailed reporting.

Setting up InstaPass

This chapter provides instructions on how to install InstaPass.

The following topics are covered:

- Requirements
- Installing InstaPass
- Registering InstaPass

Requirements

The following is required in order to install InstaPass

- InstaPass Installation CD-ROM or InstaPass.ZIP file.
- Microsoft Windows 2000, NT, XP or above
- Approximately 30Mb of free disk space
- Microsoft .NET framework Redistributable Package Version 1.1 or above (Provided on CD)

Installing InstaPass from CD

If you are installing on a Windows NT or 2000 machine, log on as a user with 'Administrator' rights.

Insert the CD-ROM into the CD-ROM drive. The InstaPass Setup should start automatically. If Autostart is disabled on your CD-ROM drive, browse to the CD and double click SETUP.EXE.

Continue through the installation program by pressing NEXT and follow the on-screen instructions.

Registering InstaPass

To register InstaPass choose HELP then REGISTER INSTAPASS from the main screen.

Click the GENERATE REGISTRATION CODE button at the top of the screen. This will give you a unique code that will be used to release the software.

Fill out the required fields (denoted by a *) and Click on Print for Faxing (you must select a pass printer before doing this. See section 2.1) or Click Send Via E-mail (E-mail settings must be configured. See 'Configuring e-mail settings' section)

PCF will then supply you with a software Liberation Key.

You then enter this key into the field at the top of this form and click 'Confirm Liberation Key'.

InstaPass will now be registered.

Using InstaPass

This chapter provides instructions on how to use InstaPass for Visitor Management and how to customize it to suit your organization.

The following topics are covered:

- **Selecting a Printer and Printer Type**
- **Visitor Management**
- **Pre-Booked Visitors**
- **Report Printing**
- **InstaPass Preferences**
 - Editing the Default Company Name
 - Customizing the Fire Regulation Information
 - Customizing the Car Park Pass
 - Using the Photograph Lookup Screen
 - Importing Phone Lists
 - Configuring the Email settings
 - Importing Email Addresses
 - Re-Ordering Clicks
 - Using the Data Export option

2.1 Selecting a Printer and Printer Type

InstaPass can be used with a variety of different printers. You must select your printer before a pass can be printed. To do this, from the main InstaPass screen click on the ADMIN SCREEN button.

Enter the ADMIN password in the space provided and click the OK button.

N.B. The trial version of the software does not have a password assigned.

From the ADMIN screen SELECT PASS PRINTER section click on BROWSE alongside 'Pass Printer'

This will allow you to select any Windows printer currently installed on your system.

You must now tell InstaPass what 'Type' of printer that you wish to use. You do this by selecting it from the pull down list alongside 'Printer Type'

For Deskjet, InkJet and Laser printers using A5 or A4 paper select 'A5 Laser/Deskjet Printer'.

For Thermal printers such as the Zebra Desktop Printer range select 'Zebra Thermal Printer'.

For The Dymo LabelWriter select 'Dymo LabelWriter'.

Click 'Exit' to return to the main InstaPass screen

For details on how to configure the printers specifically for InstaPass, please refer to Appendix 'A'

2.2 Visitor Management

Signing in a Visitor

To sign a new Visitor into InstaPass first fill out the desired fields on the main screen.

I.E. Visitor Name, From (organization), Visiting and Vehicle Reg.

Obtain Visitor Photo ID

Click PREVIEW above the Visitor Photo ID section

An image will be received from your attached camera.

Once you are happy with the image, click SAVE. The image will be recorded against the visitor information.

If you would like to re-take the picture, click PREVIEW then SAVE again.

To stop the preview, press the STOP button at any time.

Now click 'Sign in' or press F4 to sign the visitor into the system.

The Visitor's name will appear in the 'Current Visitor's List'

Viewing a currently 'Signed In' Visitor's details.

If you click the visitor's details in the Current Visitor's list, the Visitor Information fields, including photograph will be re-populated.

Signing Out a Visitor

To sign a Visitor out of InstaPass, firstly click the visitor's details in the Current Visitor's List. Click the 'Sign Out' button or press 'F9'

The visitor's details will be removed from the list.

Signing out a Visitor using 'AutoOut'

Ensure that the 'AutoOut' button is turned 'ON'. i.e. shows RED

Scan the barcode at the bottom of the Visitor Pass using the barcode scanner

The visitor's details will be removed from the list.

Previous Visitors

Once a visitor has been signed into InstaPass once, their details will be added to the 'Previous Visitors' pull down list. Once selected, the Visitor Information fields will be populated with the correct information.

To sign this visitor in again, click 'Sign in' or press F4.

Retain Information

The 'Retain Information' check box, once checked will lock all the Visitor Information fields except the Visitor Name.

Use this option when signing in multiple Visitors from the same organization.

To go back to standard Visitor entry mode, uncheck the box.

Searching for a Visitor

InstaPass allows searching for currently Signed-in Visitors either by using a Keyword search or a Pass Number.

To use the Keyword search to find a visitor, enter the word that you would like to search for in the 'For Text' field in the 'Search Visitors' section.

E.G. 'ACME Ltd'

Click the SEARCH button and InstaPass will find the first instance of 'ACME Ltd' from within the 'Current Visitor's List'.

To search for further instances of 'ACME Ltd' simply click YES when asked if you would like to search again

Otherwise Press NO. The Visitor's details will be shown in the Visitor Information section.

To search for a Pass Number, enter the Pass Number into the 'Pass Number' field in the 'Search Visitors' section.

Click the SEARCH button and InstaPass will find the Pass Number from within the 'Current Visitor List'

After performing a search you can then sign-out the visitor in the usual way.

2.3 Pre-Booking a Visitor

InstaPass allows you to Pre-Book a visitor prior to their visit. This enables speedy Sign-in once the visitor arrives.

Prebooking a Visitor

Fill out the Visitor's Details in the Visitor Information section as usual.

From within the 'Pre-Booked Visitors' section, click on the down arrow alongside the 'Pre-Book Date'.

Choose the date on which the visitor is due to arrive.

Click the 'Add Pre-Booked' button and this will add the visitor to the 'Pre-Booked Visitors' list.

Once the Visitor arrives double-click the Visitor's details in the 'Pre-Booked Visitors' list. This will sign the Visitor into the 'Current Onsite Visitors' list.

Editing a Pre-Booked Visitor

If you would like to edit the Visitor's details before signing then in, highlight the Visitor's details in the Pre-Booked Visitor's list and click EDIT.
This will re-populate the Visitor Information Fields and allow you to edit or add information. E.G. add a Vehicle Registration and Photograph.

Deleting a Pre-Booked Visitor

If you would like to remove a Pre-Booked Visitor from the list, simply highlight the Visitor's details in the Pre-Booked Visitor's list and click the DELETE button above.
The Visitor's details will be removed from the list.

Filtering the Pre-Booked Visitor's List

You can filter the Pre-Booked Visitor's list so that only Visitors due on a certain day are shown.

To do this click on the down arrow alongside the 'Filter Date' field.
Choose a date to filter by. The list now shows Visitor's due on that date.

To remove the filter and show all Pre-Booked Visitor's again, click on the 'Show All' button.
The list will now show everyone again.

2.4 Report Printing

Current On-Site Visitor Report

This report is sometimes called the Emergency Fire Report

Click on the 'Current Visitors' button from within the 'Reports' section.

You will get a Preview of a report that shows all Visitors currently Signed-in to InstaPass
You can then print the report or click 'Cancel'; to return to the main screen.

Vehicle Report

Click on the 'Vehicle Report' button from within the 'Reports' section.

You will get a Preview of a report that shows all Visitor's currently signed-in to InstaPass,
sorted by Vehicle Registration.
You can then print the report or click 'Cancel'; to return to the main screen.

Expected Visitors

Click on the 'Expected Visitors' button from within the 'Reports' section.

You will get a Preview of a report that shows all Pre-Booked Visitors. Sorted by Visitor name. You can then print the report or click 'Cancel; to return to the main screen.

History Report

Click on the 'History Report' button from within the 'Reports' section.

You will then be asked to choose a date range for the History report.

Select the 'From' and 'To' dates for the report. You can also choose to sort the report by Visitor Name or Date.

You will get a Preview of a report that shows all Visitor's that were signed in/out between the dates that you specified.

You can then print the report or click 'Cancel; to return to the main screen.

2.5 InstaPass Preferences (Admin Screen)

Editing the default Company Name

InstaPass allows for the Default Company name shown on the pass to be changed. To do this, click on the 'Edit Company Name' button from the 'Customize Pass' section.

Enter the desired Name in the box provided and Click 'OK' to confirm.

Customizing the Fire Regulation Information

To change the text shown in the Fire Regulation Section, click on the 'Fire Regulations' button from within the 'Customize Pass' section.

To alter any of the text on this screen, 'Double Click' the text, enter your new text and click 'OK' to confirm.

Once you have finished editing the text, click 'Update' to save the alterations.

Customizing the Car Park Pass

When a Visitor is signed-in you can produce 'Car Park Pass' as well as a 'Visitor Pass'.

Note. The car park pass prints automatically when using an A5/A4 printer. It can only be switched off when using a thermal printer.

The text shown on this 'Car Park Pass' can be customized to suit your needs.

To do this, click on the 'Customize' button from within the 'Car Park Pass' section.

Edit the text as desired and click on the 'Update' button to save your changes.

Using the Photograph Lookup Screen

This screen enables you to quickly display and print any photograph produced by InstaPass.

Click on the 'Lookup' Button from within the 'Photograph Lookup' section.

You can then choose a Visitor's name from the Pull down list.

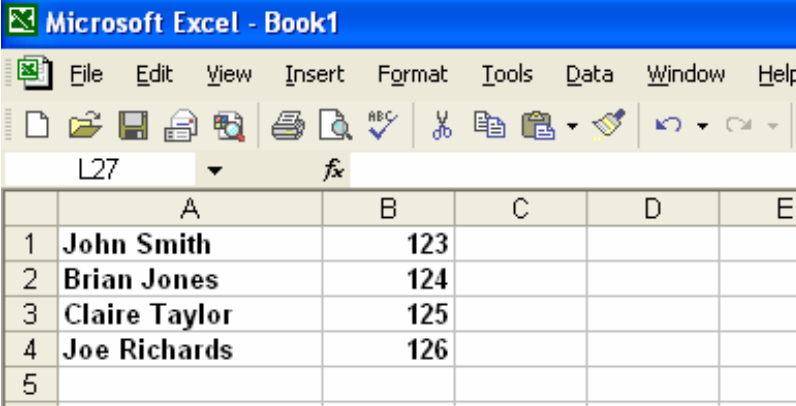
If the Visitor's photograph is on file, it will be displayed. You can then print the image by clicking the 'Print Image' button.

Importing Phone Lists

InstaPass allows you to import a list of your organization's employees so that the receptionist can easily choose the name from the 'Visiting' pull down list.

In order to do this you must first have a file available in the correct .CSV format.

From within Excel, create a table as below with the contact name in Column 'A' and the telephone extension in column 'B'



The screenshot shows a Microsoft Excel window titled 'Microsoft Excel - Book1'. The menu bar includes File, Edit, View, Insert, Format, Tools, Data, Window, and Help. The toolbar contains various icons for file operations and editing. The active cell is L27. The spreadsheet contains the following data:

	A	B	C	D	E
1	John Smith	123			
2	Brian Jones	124			
3	Claire Taylor	125			
4	Joe Richards	126			
5					

You can then save this file as a 'CSV' file by choosing 'File' 'Save As' and selecting 'CSV (Comma Delimited) .CSV' from the pull down list.

From the Admin screen, click on the 'Import Extensions' button. This will then allow you to browse for your saved .CSV file. Once you have selected it, click 'Open'.

When you return to the InstaPass main screen, the 'Visiting' pull down will be populated with the telephone list.

Once a name is selected from this list, the telephone extension is automatically displayed.

Configuring Email Settings.

When a Visitor is signed-in or out, an automatic e-mail can be sent to the person that they are visiting.

To switch this option on, check the 'Enable Email Alerts' box from within the 'Email Settings' Section.

You must then configure InstaPass to recognize your email server.

In the 'SMTP Server Name or IP Address' box, enter the name or IP address of your organization's Email server. Your IT Administrator should be able to help you with this.

e.g. 'ESERVER01' or '123.1.2.333'

You must also enter a default sender's Email address for the SMTP email.

e.g. 'reception@company.co.uk'

You can also enter some text that will be added to the body of the Email.

e.g. 'Please contact reception on Extension 100'

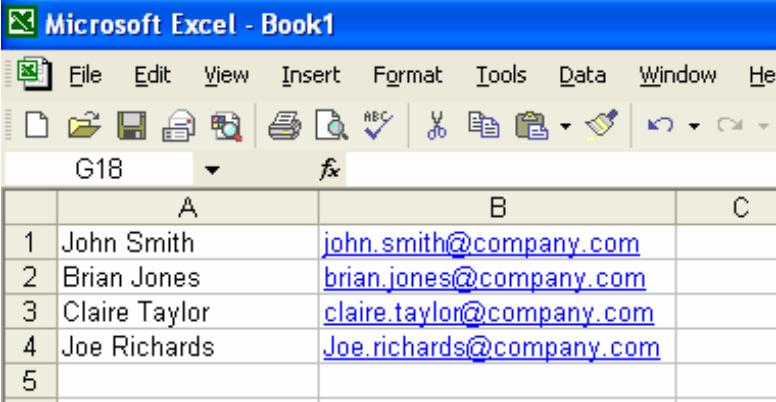
To save your settings click the 'Update Settings' button.

Importing Email Addresses

InstaPass allows you to import a list of your organization's e-mail addresses in the same way as the Telephone List.

In order to do this you must first have a file available in the correct .CSV format.

From within Excel, create a table as below with the contact name in Column 'A' and the e-mail address in column 'B'



The screenshot shows a Microsoft Excel spreadsheet with the following data:

	A	B	C
1	John Smith	john.smith@company.com	
2	Brian Jones	brian.jones@company.com	
3	Claire Taylor	claire.taylor@company.com	
4	Joe Richards	Joe.richards@company.com	
5			

You can then save this file as a 'CSV' file by choosing 'File' 'Save As' and selecting 'CSV (Comma Delimited) .CSV' from the pull down list.

From the Admin screen, click on the 'Import Email Addresses' button. This will then allow you to browse for your saved .CSV file. Once you have selected it, click 'Open'.

When you now sign a Visitor in, InstaPass will look for the email address corresponding to the 'Visiting' name entered.

An automatic e-mail will then be sent telling the 'Visiting' contact that a visitor has arrived.

Also, the same contact will get a message informing them that the Visitor has signed out.

Re-ordering Clicks.

Every time a Visitor is signed in to InstaPass a 'Click' is used. Clicks can be purchased from PCF, in order to do this, click on the 'Order Clicks' button from within the 'Admin' screen.

The amount of Clicks remaining will be displayed in the top left hand corner.

To order additional clicks, click on the 'Generate Re-order Code' button at the top of the screen. This will generate a software code that will be unique to your PC.

Fill out the required fields below. If the InstaPass e-mail settings have been configured then you can send an automatic e-mail notification to PCF by clicking on the 'Send' button.

Alternatively, click on the web link on the right to order 'on line'.

Using the Data Export Option.

InstaPass allows you to export the Visitor History to a .CSV file that can be opened using a spreadsheet.

Click on the 'Data Export' button in the Admin screen and specify the location that you would like the file to be saved.

This does not affect the history kept by InstaPass.