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WELCOME

Welcome and thank you for considering WhosOnLocation, the world’s smartest online presence management service.

This Guide is designed to take the person who is responsible for deploying WhosOnLocation through the key steps we believe will make your implementation a success.

The recommendations illustrated here are based on feedback from our users as well as our own experiences when helping new users roll out WhosOnLocation.

We also recommend the following tools which are available to all users anytime at no charge:

Our online interactive training

During the demo session we showcase the key features. You ask us questions in an open forum, and we give you feedback immediately and demonstrate how WhosOnLocation will address your specific question (s).

To book a demo email support@whosonlocation.com

WhosOnLocation Online Helpdesk

Located in the upper toolbar of users screens. In the Helpdesk users can access user guides, tutorials, submit feature requests, and submit support requests.

Email
Support@whosonlocation.com

WhosOnLocation on Twitter
@whosonlocation
DEPLOYMENT STRATEGY

Many organizations have taken a ‘big bang’ approach to implementing WhosOnLocation. This approach sees all employees engaged from day one, and all features and functions adopted immediately. Whilst organizations adopting a ‘big bang’ approach have had a successful implementation the vast majority have taken a ‘Phased Rollout’ approach.

This can be achieved in several different ways. Here are two well-known techniques:

1. **Phased rollout by Feature** - This is the most common phased rollout strategy. WhosOnLocation features are implemented one at a time. Typically you begin with just getting visitors to check-in at reception or via a visitor self-check-in kiosk. Employees are only aware that there is a new system in place because:

   a. They have received a communication release (see communications later in this paper) announcing the Trial of WhosOnLocation and/or
   b. They receive an email and/or SMS advising them when their visitor has arrived.

   As your reception team get used to the new way of managing visitors, you roll-out additional features like; Visitor pre-registration, Contractor Management, Evacuation Management, ID Card Management etc… Each new feature may require user specific training in the specific user role.

2. **Phased rollout by geography** - For organizations with multiple locations, a phased rollout by geography is a common approach. WhosOnLocation is introduced at one or more locations at a time.

Of course there are many variations and combinations of these two. Below we detail some of the advantages of a Phased Rollout:

- Companies gain knowledge and experience during the initial implementation phase that can be applied to subsequent phases.
- Employees are not overwhelmed with a large change in systems and procedures at one time.
- There is no catch-up period, employees learn as they go.
- More time for users to adapt to the new system.
- Technical staff can focus on one part of the system or a select group of users at one time.
- Project members may develop unique implementation skills that they can be positioned for in later rollouts.

Overleaf we take a look at the pre-requisites regardless of how you roll out WhosOnLocation.
THE PRE-REQUISITES

This paper assumes you have decided which location to roll WhosOnLocation out to first.

DETERMINE USER ROLES?

There are several user roles within WhosOnLocation.

**Administrator:** This role is the ‘all rights and privileges’ user role. Administrators can add new employees, make existing employees inactive, assigned user roles to other employees, update passwords, add and remove kiosks, manage visitor management settings.

**Reception Manager:** This role is assigned to employees whose job function is to manage visitor traffic into and out of a location. Typically this role is assigned to your receptionists and/or security guards manning security access gates.

**Report Manager:** This role enables the user to view and run custom reports on visitor, employee, and contractor traffic.

**Employee:** By default every employee in the database is granted access to the Employee Dashboard. From here they can manage their own profile and password, contact details, visitor notification settings, and they can pre-register visitors for themselves or their colleagues. It is not uncommon to ‘not’ grant access to the Employee Dashboard until you decide visitor pre-registration by employees is part of your visitor policy.

**Other Roles:** There are several other roles centered on the various Add-ons available in the Business Professional and Enterprise Plans. This Implementation and Release paper does not cover any of those roles.

HOW WILL VISITORS SIGN IN AND OUT?

Decide if you are going to have visitors registered onto the location by a receptionist or security guard or, allow visitors to self-register via a visitor kiosk. You may even decide to deploy both options. The decision you make initially can always be changed later and your license is not affected by the option or combination of options you choose. You have complete flexibility to try one or the other or both anytime.

**Insights Shared:** We have found that the visitor traffic count and how busy your reception or security team are at a location determines the method (s) by which visitors are managed. If your receptionist/security guard has limited responsibilities outside of the traditional gatekeeper role, then allowing receptionists to sign visitors in and out is viable. If however they are also responsible for answering a busy corporate phone, managing travel bookings for employees, managing access cards, managing stationary orders, and a host of other tasks that take them away from front-of-house duties, then a visitor self-registration kiosk is probably the favored option. That said you can again, have both in play.
HOW WILL YOU MAINTAIN YOUR EMPLOYEE DATABASE?

When visitors arrive on site and sign in they will select their host from a list of employees. When you run an evacuation report, the report can include a list of employees and their mobile contact numbers. In addition, several employees (and sometimes all employees) may have access to login to WhosOnLocation (if they are assigned a user role or simply to pre-register a visitor). For these reasons WhosOnLocation requires the employee database be maintained at all times. Typically for the 30 Day free trial you would have sent us your employee list as a ‘csv’ file. We provide a template when we send you out your Account Setup Guide. Post the trial however you would need to make the decision to either have one, or many, appointed Administrators maintain the employee database or have your employee database in WhosOnLocation automatically updated via our AD/LDAP script.

IF DEPLOYING KIOSKS; HOW MANY AND WHERE?

If you choose to deploy visitor self-registration kiosks you need to decide where to locate the kiosk. WhosOnLocation allows you to create Location Access Control Points (LACP) in any location. LACP’s could be named ‘Main Reception’, ‘Warehouse Dockway’, ‘Manufacturing Entrance’ etc… and are effectively where the receptionist/security guard or kiosks are physically located, and where visitors sign in and out.

Visitors can be signed in by a receptionist at the LACP called ‘Main Reception’ and then sign out via say a kiosk positioned at the same LACP or at another. The visitor record for reporting will show how the visitor signed in (Receptionist or Kiosk) and what LACP the visitor arrival and departure transactions took place at.

Secondly; you need to decide how many kiosks you need and whether or not you wish to channel all visitor arrival and departures through a single LACP, or if you will allow visitors to sign in and out and a number of different LACP’s distributed throughout the location.

Insights Shared: Most users channel all visitors through a single LACP called Main Reception. Those that support multiple LACP’s do so because of the physical layout or sheer size of the location. For example a location that consists of a Head Office, with a manufacturing plant semi-attached, and a warehouse and logistics operation also on the same Location will set up an LACP at each. Each of these LACP’s may have a receptionist/security guard and/or kiosks. Regardless of configuration, the Administrator and Reception Users have full visibility of who is onsite in each of the head office, manufacturing plant, and warehouse and logistic areas at all times.
KIOSK TYPES

If you have decided to deploy Visitor self-check-in Kiosks you need to make a number of decisions:

1. Where to locate the kiosk(s).
   a. On reception Counter
   b. On a Wall
2. Type of Kiosk
   a. All-in-One Touch screen or separate PC with a Touch monitor.
   b. Laptop on Reception Counter or laptop hidden from public but with USB connected Keyboard and Monitor on reception counter.
   c. Standard PC with standard keyboard and mouse on reception counter.
3. Accessories to include: Printer, Barcode reader, web cam

The Kiosk Options

Touch | on Reception Counter | driven by Laptop hidden behind counter | Dymo Printer.

Non-Touch | on Reception Counter | All-in-One PC/Monitor

Touch | on Reception Counter | positioning example
QUESTIONS YOU WANT TO ASK VISITORS

The Functionality

WhosOnLocation supports the ability for organizations to ask any question of their visitors when they arrive at a location. Please note that…

1. What is your Name?
2. Where are you from?
3. Whom are you visiting?

… are mandatory questions already active for every user account.

You may want to ask your visitors if they are parked in the visitor car park, to acknowledge a Safety Policy Message, etc…

Questions can be presented as a text statement to acknowledge or an image to acknowledge. See sample below:

Implementation and Release Consideration

Think about what questions you may want to ask Visitors. You can create independent questions for any location and target those questions towards visitors, contractors, or both.

The Customer Support Team will setup your questions once you communicate your requirements pre-trial.
VISITOR WELCOME GREETING MESSAGE

The Functionality

WhosOnLocation allows you to set a Visitor Welcome Greeting. The welcome greeting is the last screen the visitor or contractor sees when signing in. It comes after they have answered all questions and acknowledged any visitor policy rules. A typical greeting might be:

Welcome to ABC Company Limited.

In the event of an alarm please follow the instructions of our staff and assemble in the designated assembly points.

Please take a seat – your host will be with you shortly.

Implementation and Release Consideration

Think about a Visitor Greeting unique to the location (s)

VISITOR PASSES

The Functionality

WhosOnLocation supports Visitor Pass Printing. We support printing to the Dymo 450 and the Brother QL 700+ range of label printers.

The Visitor Pass is 101mm by 54mm.

Implementation and Release Consideration

- Do you want to print Visitor Passes?
- If printing from the Dymo 450 you need Dymo Labels (Code 99014)
- If printing from the Brother QL 570 or 700+ you need Brother 62mm Continuous White DK22205
VISITOR ARRIVAL ALERTS

The Functionality

WhosOnLocation includes two visitor arrival notification function:

- Email to the visitor’s host and/or;
- Email to the visitor’s host’s personal assistant or other team support person and/or;
- SMS (Text) to the visitor’s host and/or;
- SMS (Text) to the visitor’s host’s personal assistant or other team support person

Your WhosOnLocation trial includes free SMS Visitor Arrival Notifications to employees. We make SMS free during the trial so that you can access the value of this great feature.

Implementation and Release Consideration

You need to think about any employee, like your CEO or GM’s that may want those notifications sent to their PA instead of themselves.

The Customer Support Team will show Administrators and Receptionists, during User Training, how to manage SMS and Email Notifications.
USER TRAINING

Implementation and Release Consideration

You must decide who your initial users are going to be. Do you limit users to:

1. A department
2. A geography (location like Head Office)

Once that decision to made, do you limit users, at least for the 30 day trial, to just the reception team and an Administrator?

Alternately you may elect to have a small test team trial the visitor pre-registration features. This test team may include employees or the executive assistants.

Your trial and your License includes User Training online.

Users can request online training anytime by emailing support@whosonlocation.com
LAUNCH COMMUNICATIONS

We recommend Administrators issue a release statement to employees announcing the start of the WhosOnLocation Trial. We asked a number of organizations for their release statements. As a result we have put together two examples of the key points you might wish to communicate in your release statement:

SINGLE LOCATION ROLL-OUT

Subject: New Security and Safety Initiative for Employees Announcement

Statement: The Policy of [organization] is to provide a safe and secure environment for our employees, visitors, and contractors.

As part of our on-going commitment to people safety and security we are trialing a new service, WhosOnLocation, in the reception area from next Monday. WhosOnLocation has a range of features to help [organization] gain greater control around visitor and contractor presence, as well as evacuation management, and reporting.

From the perspective of you, our employees, there is little impact from Monday other than when a visitor or contractor arrives on-site to visit you. From Monday you will automatically be sent an email and/or SMS from WhosOnLocation advising you that your visitor has arrived at Reception.

Visitors will be issued with a Visitor Pass and we ask that you advise your visitor to return to reception to sign out on departure. This will allow us to maintain a high level of integrity with our evacuation reports.

As the trial proceeds we may make further announcements as we roll-out additional features.

If you have any questions please direct them to the [Title], [name].

Thank you.

Comment on this announcement:

In most a cases the announcement to employees of the trial has a safety and security centric focus. – not a visitor management focus. You may choose to add comments about a visitor Kiosk if applicable.
MULTI-LOCATION ROLL-OUT EXAMPLE.

Subject: New Security and Safety Initiative for Employees Announcement

Statement: The Policy of [organization] is to provide a safe and secure environment for our employees, visitors, and contractors.

As part of our health, Safety, and Security strategy to get all of our business units acting as one, we are rolling out a single, software as a service (SaaS) visitor management service from WhosOnLocation, in the reception area from next Monday.

With greater compliance requirements falling on our organisation to account for people in the event of an emergency, and our business units across the country acting almost totally autonomously, with different procedures and methods being used in each, the decision to deploy a standardised system is necessary and makes sense. No function – visitor management, contractor presence management, and employee presence management - is harmonised across our business units.

WhosOnLocation has a range of features to help [organization] gain greater control around visitor and contractor presence, as well as evacuation management, and reporting.

From the perspective of you, our employees, there is little impact from Monday other than when a visitor or contractor arrives on-site to visit you. From Monday you will automatically be sent an email and/or SMS from WhosOnLocation advising you that your visitor has arrived at Reception.

Visitors will be issued with a Visitor Pass and we ask that you advise your visitor to return to reception to sign out on departure. This will allow us to maintain a high level of integrity with our evacuation reports.

As the trial proceeds we may make further announcements as we roll-out additional features.

If you have any questions please direct them to the [Title], [name].

Thank you.
COMMITMENT TO GOING LIVE

We recommend Administrators issue a release statement to employees announcing the decision to continue with the WhosOnLocation service post Trial. Especially if you did issue a trial release notice. Again we submit a very simple example:

Subject: WhosOnLocation now part of [organization]

Statement: Our trial of the WhosOnLocation service at reception has finished and we are pleased to confirm our continued use of this service.

We trust you have found the email and/or SMS Visitor Arrival Notification service a useful benefit, especially if you are away from your desk.

As mentioned in our earlier email, when we began the trial, there are a range of features which we may be introducing that may impact your area in time. As we roll these out we will make further announcements if they impact you, or your area.

If you have any questions please direct them to the [Title], [name].

Thank you.
# RELEASE GUIDE TABLE

The following table outlines a typical Release programme. Days start 30 days prior to the start date of the trial but are an indication only as each organization differs. This release guide assumes you have already participated in our online demo and have selected the first location to initially deploy WhosOnLocation to.

## PRE-REQUISITES

<table>
<thead>
<tr>
<th>Day</th>
<th>Task</th>
<th>Description</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>-30</td>
<td>Administrators</td>
<td>Decide on whom, within your organisation is to be your WhosOnLocation account Administrator.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Employee Database</td>
<td>Decide how, long term, you wish to maintain the employee database; manually or via data sharing via AD/LDAP.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Visitor Sign in and out method</td>
<td>Decide if it is to be via Reception, Security Guard, and/or Kiosk(s).</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Kiosk Type (if applicable)</td>
<td>Decide if kiosks are to be standard PC’s with a keyboard and mouse or Touchscreen.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Visitor passes.</td>
<td>Decide if you want to issue visitor passes and if so, what logo you want on your visitor pass.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Barcode Inclusion</td>
<td>Visitors can scan themselves out at a kiosk if the visitor pass includes a barcode. Decide if this is required.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Visitor arrival notification methods.</td>
<td>Decide on Email and/or SMS</td>
<td></td>
</tr>
<tr>
<td></td>
<td>SMS Recipients (if applicable)</td>
<td>Decide if all employees will receive an sms (text) when their visitor arrives or just those employees in management or with a mobile/roaming function as part of their position description</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Visitor Questionnaire</td>
<td>Decide what Visitor questions must be answered by visitors</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Visitor Welcome Greeting</td>
<td>Decide what welcome greeting you want visitors to acknowledge prior to completing the sign in process.</td>
<td></td>
</tr>
<tr>
<td>-20</td>
<td>Complete the Account Setup Guide</td>
<td>Send the Account Setup Guide to <a href="mailto:support@whosonocation.com">support@whosonocation.com</a>. The WhosOnLocation Customer Support Team use the Account Setup Form to create and configure your account to meet your requirements.</td>
<td></td>
</tr>
<tr>
<td>-18</td>
<td>Account Login and Credentials sent.</td>
<td>WhosOnLocation will send the login credentials for users and kiosks (if applicable) to your account Administrator.</td>
<td></td>
</tr>
</tbody>
</table>
HARDWARE, CONNECTIVITY, AND TESTING

<table>
<thead>
<tr>
<th>Day</th>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>-18</td>
<td>Order Hardware.</td>
<td>If using Visitor Kiosks, order touch or non-touch kiosk, Barcode readers, Label Writers.</td>
</tr>
<tr>
<td></td>
<td>Setup Hardware</td>
<td>Kiosk setup simply requires internet connectivity. We give you the details with the Account Setup Form.</td>
</tr>
<tr>
<td>-3</td>
<td>User Training</td>
<td>WhosOnLocation Customer Support run Administrators and/or Receptionists through user training.</td>
</tr>
<tr>
<td>-1</td>
<td>First Internal Communication</td>
<td>Announce new system internally</td>
</tr>
</tbody>
</table>

IN 3 DAY FREE TRIAL PHASE

<table>
<thead>
<tr>
<th>Day</th>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>First Review</td>
<td>WhosOnLocation will contact Administrator to confirm user satisfaction and identify any additional training required.</td>
</tr>
<tr>
<td>25</td>
<td>Trial Expiry Notice</td>
<td>5 day Notification</td>
</tr>
<tr>
<td>30</td>
<td>Trial Ends.</td>
<td>Trial Report sent to Administrator. Report highlight visitor numbers during trial period and forecasted yearly visitors, and License Plan recommendation.</td>
</tr>
</tbody>
</table>

MULTIPLE LOCATION DEPLOYMENTS

With multiple-location deployments we recommend following the same implementation steps as detailed here but naturally with a different start date for each Location. We do have experience with some organisations going live with 20+ sites on the same day. In such cases the same steps are followed as above however they are repeated ‘concurrently’ at each location. Online training can be facilitated for a specific user role across multiple locations at the same time. (As we deliver training in a webinar format)