



JAMES CHECKLIST

FOR A SUCCESSFUL START

Thank you for choosing JAMES - the visitor management system and welcome to the metaSEC checklist for a successful start.

In order for the projects to be as smooth as possible, we have developed a simple checklist for you. Please read this document carefully to verify, that all the necessary information are available and any preparatory work is still required before the implementation can begin.

All settings can be found in the **JAMES System Manager**.

Remember, this information is required for the start. Of course these should be sensible and well thought out. However, if you have forgotten something or made any errors, the settings can be changed at any time.



1. GENERAL INFORMATION

This information is used to understand and assess the scope and requirements of your project. Please take a few minutes to fill it out completely.

Multilingualism

English

Fench

Spanish

Italian

Polish

Turkish

Other languages

WHAT ELSE IS OF INTEREST TO YOU?

Self Check-In

Manned reception / concierge

Multi-tenancy

Multiple locations



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2. PORTAL USERS

Consider which users of your organization should be able to send invitations from the system. These users can log in to the host portal.

Here, for example, you can also assign or restrict the corresponding admin rights.

Consider a list of the first users for the initial installation.

<i>Surname</i>	<i>First name</i>	<i>e-mail</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____

Connection to Active Directory *For this point, please enter the person responsible for the IT in the contact matrix (point 16).*



3. CONTACTS

Manage your contacts to receive an invitation from the system. Here you can create, delete and group new contacts.

In addition to standard information such as name, telephone number and mobile phone number, and the car registration plate number, you can also enter information such as joining instructions or acknowledgement requirements, e.g. by line managers.

This list can be very comprehensive. Maintain these directly in the system under the item: **System Manger / Contacts**



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4. VISITOR CATEGORIES

Visitors can be divided into different categories to better categorise them. For example you might categorise them by Contractor, Supplier, Employee from Overseas etc.

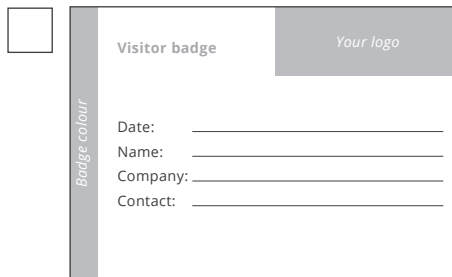
<i>Visitors</i>	<i>Function</i>	<i>Badge colour</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____

For more categories, see **System Manager / Visitor Categories**.



5. VISITOR BADGES

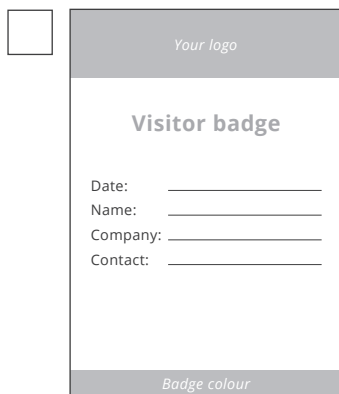
Each visitor should wear his/her visitor identity card at all times. You can choose a predefined design or create your own customised design.



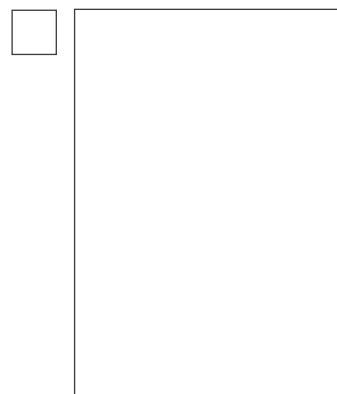
Standard template



Your design



Standard template



Your design



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6. CUSTOMISE THE NOTIFICATION TEMPLATES

The system provides templates for all notifications in the default configuration. You can easily customise the included ones. There are various options, such as: Upload your own template, or create the notification using an editor directly in the JAMES interface.

Should you use additional languages, the notifications should also be created accordingly in these languages.



7. RESOURCES

Do you need resources to assign them to an appointment, if necessary?

In resources, things can be entered such as rooms, equipment such as projector or flipcharts, or somewhat abstractly, the window sill, e.g. to remind colleagues to clear the window sills for the coming of the window cleaners.

- | | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Projector | Guest
WIFI | Meeting room | Parking
spot | Hotel room | Escort from
the reception |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Preparing
the room | Window sill | Hospitality | Snacks | Drinks | Catering
extern |

Other



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8. DOCUMENTS FOR DISPATCH UPON INVITATION

Add documents to be sent when you create an invitation. This can be house policy, driving directions, marketing documents and much more.

In the case of important documents you also have the option of the »required release« to activate. This ensures that the visitor receives these documents upon arrival using the signature pad.

House policy

Approach

Marketing-
documents

Safety training

Other



9. INSTRUCTIONS AND TRAINING SESSIONS

Training and instruction management can be an extensive topic, which might go beyond a simple checklist. The following points are meant as a guide only.

Once the »Training and Instruction« module has been licensed, you will be able to see an example of the included process in the **System Manager**.

When setting up the training in the system, please provide information such as: Validity period, whether you need to enable options such as use of the signature pad or »four-eyes principle« (requires 2 people to be present or to confirm the action) by ticking the appropriate boxes or writing comments below.

Text-based
instruction

Interactive
instruction

»Final test«

Explanatory
videos

Confirmation:
signature

Confirmation:
Four-eyes principle



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10. CHECKLISTS

Checklists can also be created just as easily. Options such as verification of the checklist or verification using the signature pad are available.

Checklist: Arrival of a visitor

Confirmation:
signature

Confirmation:
4-eyes principle

Checklist: Departure of a visitor

Confirmation:
signature

Confirmation:
4-eyes principle

Checklists can be very extensive and can be composed of various parts. If you need help with the creation process, you will find an example checklist in the **JAMES System Manager** under the **checklists** section.



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11. ROOMS

Manage your meeting rooms at JAMES. This is to avoid double booking a room and to see which rooms are available for a meeting at any time. If you have larger parking space, you can also manage it via JAMES. If you have parking spaces available for visitors, you can also manage it via JAMES.

<i>Name</i>	<i>Capacity</i>	<i>Remark</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____



12. PARKING SPACES

If you have larger parking space, you can also manage it via JAMES.

<i>Name</i>	<i>Capacity</i>	<i>Remark</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____



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13. GENERAL SYSTEM TEST

Check whether all entries are correct and that you have processed all the points in the checklist. Follow an invitation process, check in and out, check if the e-mails arrive, etc.



14. CONNECTED HARDWARE

- | | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Printer | Signature pad | Document scanner | Connection PBX | Vehicle recognition | IO's or Relay |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | | |
| Video (camera) | Sound (speaker) | Info displays | | | |



15. FURTHER ENHANCEMENTS AND OPTIONS

- | | | | | | | |
|---------------------------|-------------------------------------|----------------------------|-----------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Collection point | Alarm/emergency call | Connection control station | Connection Active Directory | Virtual Concierge | JAMESlingo | JAMESdialog |
| <input type="checkbox"/> | | | | | | |
| connection access control | Which system / product is connected | | | | | |



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14. SELF CHECK-IN PORTAL

Receive your visitors the with a customized welcome screen. To do this, you can select which of the modules are relevant to you and which should be displayed on the screen.

ITEMS (TILE ON THE START SCREEN)

- | | | | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Language selection | Location plan | Search contact | emergency call | Call on subscriber | QR-code scanner | Document scanner | Changing content |

Others

HARDWARE

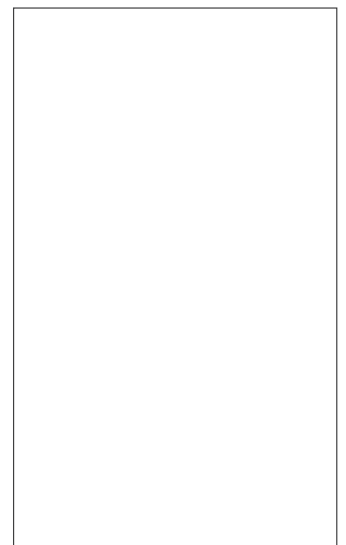
- | | | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Printer | Document scanner | Signature pad | Access control readers | QR-code scanner | Camera | Intercom/PBX Call (JAMESdialog & JAMESlingo) |

Other options

SCREENDESIGN



Standard template



Your design



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15. VISITOR PROCESS / PROCEDURE

Sketch here your desired visitor process, eg. the arrival of your visitor.

The sketching area contains a large, light gray pencil graphic oriented diagonally from the bottom-left to the top-right. At the top center of the sketching area, there is a small gray icon of a person carrying a briefcase, with the word "Arrival" written below it and a downward-pointing arrow.



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16. CONTACT MATRIX

Please include all relevant contact persons in this list.

IT

<i>Name</i>	<i>First name</i>	<i>E-mail</i>	<i>Phone number</i>	<i>Company / branch</i>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

RECEPTION (PERSON RESPONSIBLE)

<i>Name</i>	<i>First name</i>	<i>E-mail</i>	<i>Phone number</i>	<i>Company / branch</i>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

PLANT PROTECTION / SECURITY GUARD

<i>Name</i>	<i>First name</i>	<i>E-mail</i>	<i>Phone number</i>	<i>Company / branch</i>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____