Trust Visitor - Sponsor Visit Request Wizard

The Sponsor is a user who is initiating a request for people to visit a location managed by Trust Visitor. The Wizard by default would be open to any authenticated user. The Wizard is intended to service several related but district visitor scenarios. The common theme is to grant temporary access for visitors to a location. Where possible, the visitors will use their PIV cards to gain physical access to the location. If the visitor does not have a PIV card, then sufficient information must be captured about them to enable the necessary security checks and approvals. A temporary card will be provided to enable physical access for visitors without a PIV card. The sponsor scenarios are as follows: -

* An internal user who is organizing a meeting/conference with one or more attendees. The attendees could be a mix of internal and external users.
* An internal mobile user wishing to use a temporary desk or office space at a location other than their normal place of work.
* An internal user who has engaged short term contractors who will needs them to access to a location for the duration of the contract.
* An internal user or authorized external user who is responsible for managing temporary maintenance and facilities contractors at a location who will require access to one or more maintenance orientated area such as a cafeteria or electrical and telecommunication area.

# Wizard Sequence

The objective of the wizard is to deliver a relevant, personalized experience for the visit sponsor. It will leverage information about the sponsor and the sponsor organization from AD. The sequence of the pages is to optimize the downstream pages.



Figure Wizard Sequence Summary

# Visit Type Page

Visit Name is a string assigned by the sponsor to identify and manage the request over time.

The Visit Type is a system defined enumeration of option intended to guide the workflow and options to be more specific to the user’s needs.

* **Meeting: -** Where a number of people will be meeting together at a single location for a short duration e.g. an hour, all day or possible several days. Meeting can be held in attendee’s offices or meeting rooms
* **Conference: -** Where a number of people will be meeting together a one or more locations for short duration. Conferences are not held in an attendee’s office. Conferences can be held is meeting rooms or groups of meeting rooms or conference areas.
* **Mobile Worker**: - Where a user wants to visit a location to take advantage of a temporary office or desk sharing area. The initiator of the request is the person requesting access to the location and the are no others involved. The locations would be designated for mobile workers.
* **Contractors: -** Where the sponsor is arranging for the accommodation of temporary contract staff at location.
* **Maintenance and Facilities: -** Where the sponsor is arranging for maintenance and facilities workers to gain access to a location. The main distinction over the temporary contractors is the nature of the locations and the number of locations. There are likely special access rights defined for such access.

Each of the visit types will be access controlled via AD group membership. Broadly applicable types such as meeting would be defaulted to something like authenticated users. More specialized types such as contractors or maintenance would have special groups created since this will be administered users as part of their job function.

The Visit Purpose would be a choice of

* Enter new purpose via text box + optional attachments
* Select a previously defined purpose defined by the sponsor
* Pick a purpose from administrator defined list.

Text box and attachments would be enabled for ad-hoc meeting and conferences. The sponsor can choose to enter a new purpose or pick from one they have previously defined.

Predefined list would be administrator reoccurring visits such as for a project or contractors. Predefined list entries would be access controlled to manage who could use them.

# Visit Duration Page

Reoccurring Meeting checkbox would define if the meeting is single or reoccurring event. The checkbox would be cleared and disabled for contractor requests.

All Day Meeting checkbox defines if the meeting lasts one or more full days. The checkbox would be set and disabled for contractor requests

The date time entry is dependent on whether it’s a single or reoccurring meeting and if an all-day meeting.

## Single Meeting Duration Definition

The single meeting duration would define a single contiguous time span.

All day meetings have a start date and end date. The minimum time span for multi day meetings is 1 day. The maximum is administrator defined (default=6 months)

Sub day meetings have a date, and a beginning and end time with a 30 minutes minimum and 15 minute increments.

## Recurring Meeting Duration

A recurring meeting is a single day meeting which recurs on a defined cadence. The meeting duration is the same as a single day or an all-day meeting.

Reoccurrence Frequency

The sponsor defines the cadence of the reoccurrence. It’s an enum of Daily, Weekly, Monthly.

Daily would have an integer for every n days

Weekly would have an integer for every n weeks and on which days of the week. The administrator would define if the building was open at the weekend. If closed, then those days would be disabled.

Monthly would have an integer for every n months. Monthly would allow a choice reoccurrence based on a day of the month (1-31) or reoccurrence based on a cadence of every n *day* e.g. every second Tuesday.

# Attendees Page

This page is not shown to mobile workers.

The attendees page will allow the definition of attendees to the series of meeting as well as to specific instances of a meeting as calculated from the cadence.

This is the list of people who need access to the location as part of the visit. The primary identification for attendees in the case of meeting, conferences and contractors is email address.

Internal attendees are picked from the organization address book. Internal attendees will be sent an email if their PIV card details are not registered with Trust Visitor.

External attendees email can be picked from sponsors contact list; previous visitors the sponsor has named or manually entered. External visitors will be sent an email invitation which allows them to complete the personal information if new or confirm the information if returning. The approval state of the visitor would be displayed once selected i.e. approved, clearance, level.

The list of attendees for maintenance and facility visits is picked from a list of previously registered and approved users as part of the contract.

The attendees page will accept a CSV file to populate the attendee’s details.

# Location Page

For type = meetings, the possible locations include the offices of one of the internal attendees. Sponsors can easy pick an attendees office or meeting room. Based on the sponsors location, the default view will be a list of the meeting rooms on the same floor of the building of the sponsor. It should also be possible to quickly select meeting rooms on another floor in the same building or from a building nearby.

For type = Conference would be in locations designated for conferences.

For type = Mobile workers would be able to select from locations designated for mobile workers.

For type = Contractors, the sponsor would be presented locations designated office space for temporary workers.

For type = Maintenance and facilities would be presented locations linked to the purpose e.g. electrical or catering. The location may be a group of locations e.g. all electrical rooms in building.

The location display would have a filter display hierarchy of

* Region: - possible child = campus or building
* Campus: - possible child = building
* Building: - possible child = floor
* Floor
* The main display would list all rooms on the floor matching the type filter requirements.

The sponsor can then pick the location required.

The maintenance type would not have a separate floor and would stop at building.

### Summary and Submission Page

The Summary page of the wizard displays the information from the previous pages for the sponsor to review. If all the mandatory fields are complete, then the submit button would be available.

The summary page would also display any issues with the proposed request. For example, is the meeting outside normal building opening times, is the reception able to cope with the number of visitors. This would allow the sponsor to make changes if possible to address the warnings.

# Wizard State & Navigation

The wizards would present navigation buttons to move backwards and forwards though the wizard. There should also be a save button on every page which would save the current state of the request.

## Visitor Registration Page

Once the request is submitted, an email is sent to all external visitors and internal attendees without a registered PIV card. The email contains a link to the Visitor Registration Page as one time use URL specific to the visit.

The page would display the proposed meeting place time.

The web page functionality forks around the answer to “do you have a PIV card”

If yes, the user is requested to authenticate to the web page using their PIV card. There will be a PIN prompt from thir browser. Once the user has authenticated with their PIV card, we can harvest the necessary data from the certificate. We can determine from the certificate if we have the card data. If not and we detect the user has a supported browser and Java is enabled, we can collect the necessary data from the card. If not, inform the user to arrive early to complete registration

If the user does not have a PIV card, we will need PII data to identify the user.

* Given Name
* Surname
* Maiden name (opt)
* DoB
* PoB
* Sex
* Citizenship
* Driver License state\number or Passport country\number