# Trust Visitor - Sponsor Visit Request Wizard



The Sponsor is an internal user (someone with an account in Active Directory) who is initiating the visit request. The Wizard by default would be authorized by a pervasive group e.g. Authenticated Users. The wizard is intended to service several related but district sponsor 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 holding a meeting with one or more attendees. The attendees could be a mix of other internal users 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 need access to a location.
* An internal 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 Pages

### Visit Type Page

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

The Visit type is 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 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.

### Visit Purpose and Dates Page

The Purpose would be a choice of

* text box + attachments or
* pick a purpose from pre-defined list.

Text box would be for ad-hoc meeting and conferences. Predefined list would be reoccurring visits such as for a project or contractors. Predefined list entries would be access controlled to manage who could use them.

Dates and time of the access could be minimum of 30 minutes up to 6 months. The system would have a default for the actual access start time to allow before the meeting time so people can get to the actual room on time. This needs to be shown to the sponsor to allow them to change if needed.

### Attendees Page

This page is not needed for mobile workers.

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 is email address.

External visitors will be sent an email invitation which allows them to complete the personal information. External attendees can be picked from sponsors contact list or manually entered. Trust Visitor will store a history of external visitors and will populate the remaining fields if there is a match on the email address from a previous visit.

Internal attendees are picked from the organization address book.

Conference type would accept a CSV file to populate the attendees.

Maintenance and contracts requests can both allow a third party to complete the visitor information e.g. a manager or supervisor. The sponsor can check a box to indicate that the email address is not the visitors but the manager\supervisor of the visitors. This will change the form on the personnel information workflow which follows the visit request.

### 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 near the sponsor i.e. on the same floor. 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 hierarchy of

* Country (not v1)
* Region, possible child = Region, campus or building
* Campus: - possible child = building
* Building: - possible child = floor
* Floor: - possible child = room, suite

### 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.

## Wizard State & Navigation

The wizards would present the standard forward\backward navigation buttons to move though the wizard. There should also be a save button which would save the current state of the request.

## Personal Information Page

Once the requires is submitted, an email is sent to all external visitors for them to confirm\complete their personal information. The email would contain a link to a one time use URL

The main workflow fork is “does the visitor 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. 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

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