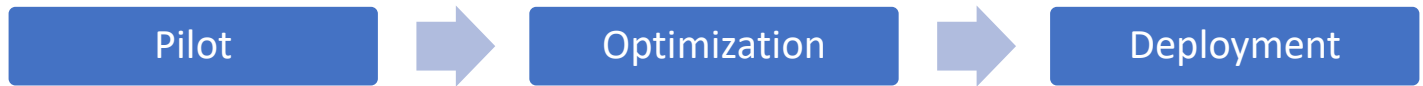


GateKeeper Proximity Evaluation Form



Project Overview

| | |
|--------------------------|---|
| Scope: | IT Administrators from the company will be trained to utilize the Enterprise software for simplified computer access and user credential management during a 30-day trial. Rather than having users type their email address and password to authenticate onto the computers, users will be assigned a Halberd Token and 4-6 digit PIN to quickly authenticate onto the computers and when the user is no longer detected near their computer, the GateKeeper software will trigger an 'auto-lock' event. User reports may be used to determine when users have clocked in/out for the workday, as well as basic contract tracing capabilities. |
| Goals: | Simplify computer access through MFA which will ultimately optimize day-to-day workflow. The IT Department should see a significant reduction in support tickets related to password reset requests. |
| Project Deadline: | |

Phase I: Pilot

1. Demo

Discovery Call Date: Click or tap to enter a date.

Enterprise Demo Date: 10/14/2020

| Done | Goal |
|--------------------------|---|
| <input type="checkbox"/> | Schedule: 15-minute Discovery Call to determine project scope and introduction to features and tiers. |
| <input type="checkbox"/> | Documentation Requests Sent: Case Study, Compliance Matrix |
| <input type="checkbox"/> | Send: Budgetary Quote and Deployment Schedule. Please provide approx. number of users and computers. |
| <input type="checkbox"/> | Schedule: 30-minute Enterprise Demo – Lunch and Learn . |

2. Trial Preparation

Enterprise Installation & Training Date: Click or tap to enter a date.

| | |
|--------------------------|---|
| <input type="checkbox"/> | Pre-Installation Questionnaire for system requirements and network compatibility. |
| <input type="checkbox"/> | Complete: Configuration List of Users and Computers . Identify users and computers for upcoming trial. |
| <input type="checkbox"/> | Ship samples for trial and confirm delivery. Tracking details for samples. |
| <input type="checkbox"/> | Schedule: 90-minute Enterprise Installation & Training with the GateKeeper admins. Confirmed with calendar invite containing Zoom/Webex screensharing link. |

3. Installation & Configuration

Configuration Review Date: Click or tap to enter a date.

| | |
|--------------------------|--|
| <input type="checkbox"/> | Create a GateKeeper Customer Portal account to access your trial license. |
| <input type="checkbox"/> | Set up [Cloud / On-premise] GateKeeper Hub server application. |
| <input type="checkbox"/> | Install client-side application on all test computers. |
| <input type="checkbox"/> | Set up trial users with GateKeeper tokens and computer login credentials on the Hub. |
| <input type="checkbox"/> | Review LOCK and UNLOCK settings and configure GateKeeper for 2FA. |
| <input type="checkbox"/> | Demonstrate features of the Hub (Administrators, Licenses, Groups, Users, Computers, Reports, Audits, AD). |
| <input type="checkbox"/> | Introduce GateKeeper Knowledge Base to answer frequently asked questions. |
| <input type="checkbox"/> | Schedule: 30-minute Configuration Review follow-up for optimization and end user review. |

Phase II: Optimization

4. Week 1: Configuration Review

Date: [Click or tap to enter a date.](#)

| | |
|--------------------------|--|
| <input type="checkbox"/> | Ensure that all users have been added to GateKeeper Hub and assigned their GateKeeper tokens. |
| <input type="checkbox"/> | Ensure GateKeeper Client software is installed on all computers and they are synchronizing with the Hub. |
| <input type="checkbox"/> | Check Audit Logs to ensure that users are logging on to computers using GateKeeper. |
| <input type="checkbox"/> | Run reports on GateKeeper events and session activity. |
| <input type="checkbox"/> | Review how to revoke user access from the network and how to reuse a token. |
| <input type="checkbox"/> | Review Password Manager to showcase how to add and edit passwords for websites. |
| <input type="checkbox"/> | Review lock and unlock range settings to optimize for individual machines. |
| <input type="checkbox"/> | Schedule: 30-minute Final Trial Review. |

5. Week 2: Final Trial Review

Date: [Click or tap to enter a date.](#)

| | |
|--------------------------|---|
| <input type="checkbox"/> | Ensure that users are logging on to computers using GateKeeper by checking Audit Logs. |
| <input type="checkbox"/> | Run reports on GateKeeper events and session activity. |
| <input type="checkbox"/> | Check GateKeeper Groups to ensure all access policies are set properly. |
| <input type="checkbox"/> | Review end-user feedback, administrator feedback, and any additional workflow scenarios. |
| <input type="checkbox"/> | Validate that the solution meets your initial requirements and talk about next steps. |
| <input type="checkbox"/> | Review and choose purchasing options (Plans, Pricing). |
| <input type="checkbox"/> | Schedule: 30-minute End User Review according to company's roll-out plan. |

Phase III: Deployment

6. Deployment Review

Deployment Date: [Click or tap to enter a date.](#)

| | |
|--------------------------|---|
| <input type="checkbox"/> | Purchase hardware and license subscription through the Customer Portal > STORE. |
| <input type="checkbox"/> | Review user on-boarding and GateKeeper Client application deployment with Hub administrator(s). |

| | |
|--------------------------|--|
| <input type="checkbox"/> | Review knowledge base and other support options. |
| <input type="checkbox"/> | Review end-user interaction with GateKeeper and schedule time for additional user training, if required. |
| <input type="checkbox"/> | Schedule: Deployment Date . Our team will assist during this period to ensure a timely roll-out. |