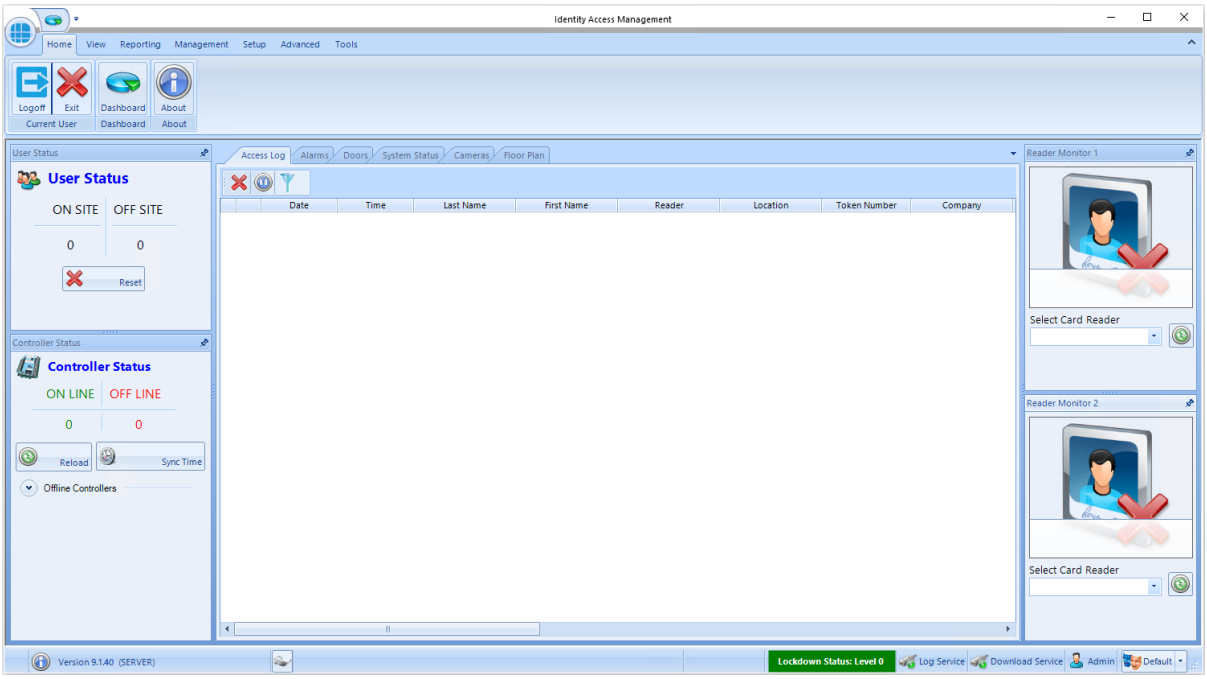
Controlsoft Identity Access Management Software



IA Software Operator's Guide v9 © 2020 Controlsoft Ltd

Contents

1. Introduction

The Identity Access (IA) Management Software from Controlsoft© is a PC-based Access Control Management system. The Identity Access software manages the access control database, which is downloaded to one or more Master i-Net® Controllers. The Master i-Net controls access through the doors, either directly or via expanders. The i-Net controller(s) make the decisions as to whether access is granted or denied.

NOTE: Your system may not support all the features described in this manual, depending on the configuration of the system and the type of license applied. Please contact your installer / maintenance company for further information.

Conventions used in manual:

On-screen text

Cross reference links

`Text to be typed in`

Notes

[On-screen Buttons]

2. Starting the Identity Access Software

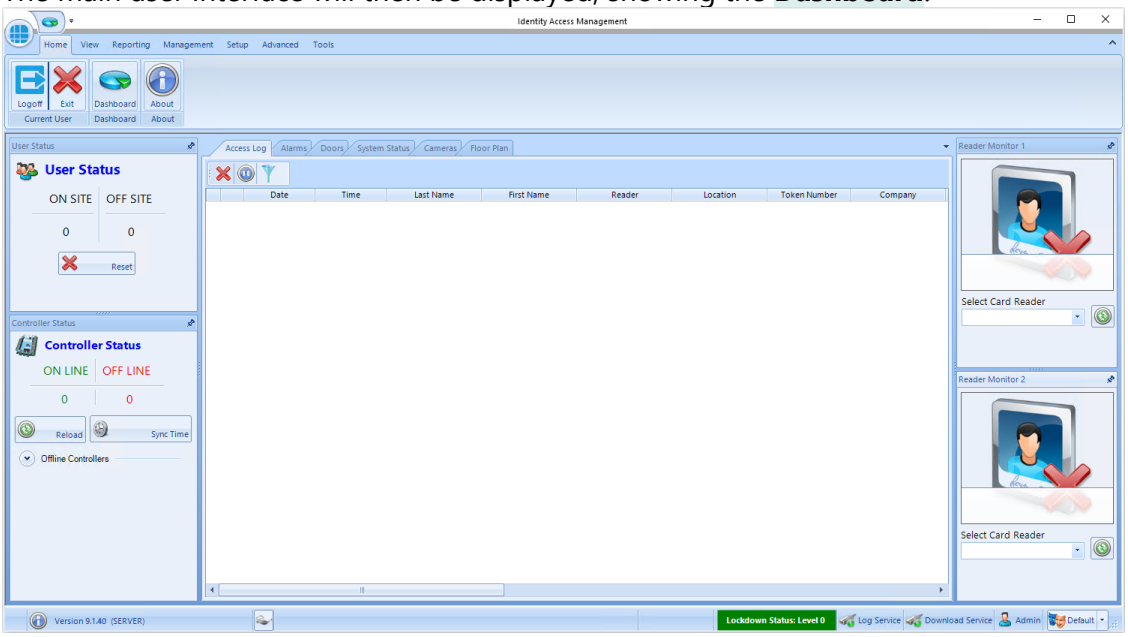
To launch the Identity Access software:

1. Start Identity Access as follows.
   Select **Start** > **Controlsoft** > **IA User Interface**
   The following splash screen will be displayed:

2. When initialised, the Logon screen will be displayed:

3. Enter a valid Username (default = Admin) and Password (default = Password) and click the **[Logon]** button (or press **[Enter]** on the keyboard).
   NOTE: these credentials are case sensitive.

4. The main user interface will then be displayed, showing the **Dashboard**:



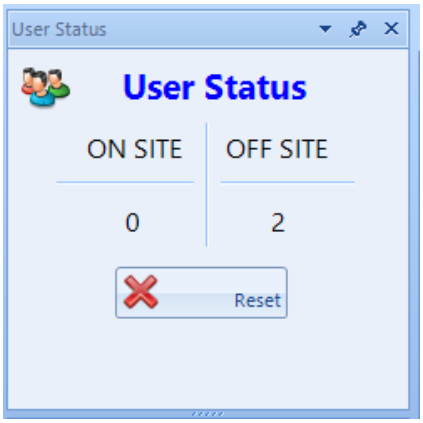
Note: The most common technique to log on to the software is to enter a Username and Password as described above If the operator is also a user, it is possible to log on to the software using a fingerprint (if enrolled) and a Biometric enrolment reader installed on the machine. Note – The user biometric details will need to be mapped to an operators account before **[Secure Logon]** can be used.

Click the **[Secure Logon]** button on the Logon screen and present a finger to the fingerprint enrolment reader.

3. The Dashboard

The Dashboard is where Operators can monitor the system on a day to day basis. Each section is dynamically updated, without the need to press a refresh button or similar.

The Dashboard can be accessed from anywhere in the software by clicking the  symbol in the top left of the screen (or click on the **Home** tab and select **Dashboard**)



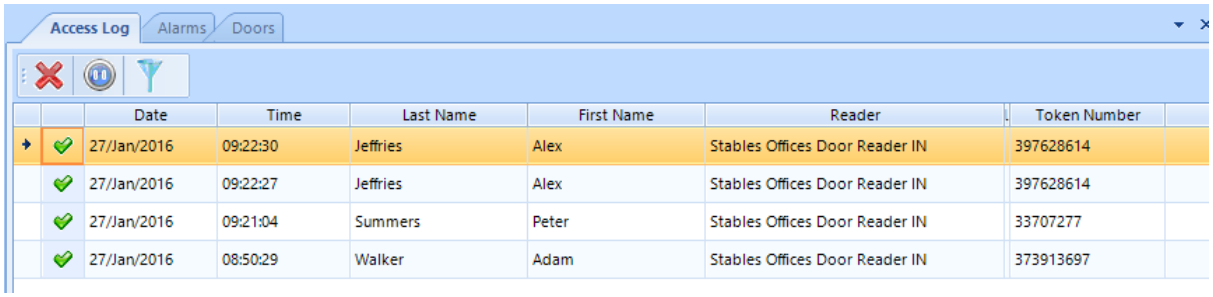
On the left-hand display is a box called **User Status** that shows how many users are currently on site. This is only relevant where there are IN and OUT readers to and from the premises. In the example here, there are 2 users, and both are currently off site.

Also on the left, is the Controller Status box, this shows how many Master i-Net Access Controllers are online and offline. Any offline controllers will be listed individually using the drop down arrow. If any are showing as Offline, please report this to your installation / maintenance company immediately as the i-Net Access Controller will not be updated while it is in this state.

Access Log Tab

The **Access Log** Tab shows a live view of access events from all around the premises. Whenever the software is closed this window viewer will be cleared. Where the event shows a tick the controller has granted access, where the event shows a red cross someone has been denied access. Scrolling the viewer window to the right will show the Reason for the

access denied event.



Alarms Tab

The **Alarms** Tab will show various user defined software alarms, such as Door Forced Open or Fire Alarms. The operator can view these alarms, once investigated the event can be acknowledged with the **[Accept]** button, then cleared with the **[Clear]** button. If the event is on-going the alarm will reappear in the Alarm Tab.

Doors Tab

The **Doors** tab is available to remotely Grant Access or to Force a Door Open. Simply select the door you wish to open. Clicking **[Grant Access]** will unlock the door for its defined unlock time (default = 5 seconds). Clicking **[Remote Release]** will latch the door open. This door will then remain open until **[Relock]** is clicked which will then override the Forced Open command.

The symbols next to the doors indicate the last event at the door. The options are:

 Access Granted via Operator: This symbol indicates that access was granted through the software by the operator.

 Door Forced Open via Operator: This symbol indicates that the door was latched open through the software by the operator.

 Door Forced Closed via Operator. This symbol indicates that the door was latched closed through the software by the operator.

 Pushbutton. This symbol indicates that the door was accessed by pressing a Request to Exit pushbutton.

 Access Granted. This symbol indicates that access was granted via the reader to unlock the door.

 Access Denied. This symbol indicates that access was denied via the reader and the door was not unlocked.

 Door has not been accessed since the software has been opened.

The doors tab also has facility for Site Lockdown. If enabled, this allows an operator to deny access to some or all users, depending on whether Level 1 or Level 2 lockdown is selected. Simply click the relevant button to change the lockdown state

System Status tab

This screen provides information as to whether the Log Service and Download Service are running and whether Asure ID and the Mobile Access Portal are available. The Log Service and Download Service must be running for Identity Access to operate correctly.

Cameras tab

This screen allows an image from a single camera to be viewed. Pan, Tilt and Zoom buttons are provided for moving PTZ cameras

Reader Monitor

On the right-hand side of the Dashboard are 2 Reader Monitor screens. Select the Card Reader you wish to monitor. When someone accesses the reader, their photograph (if programmed) will be displayed in the Reader Monitor display alongside their name and time of entry.

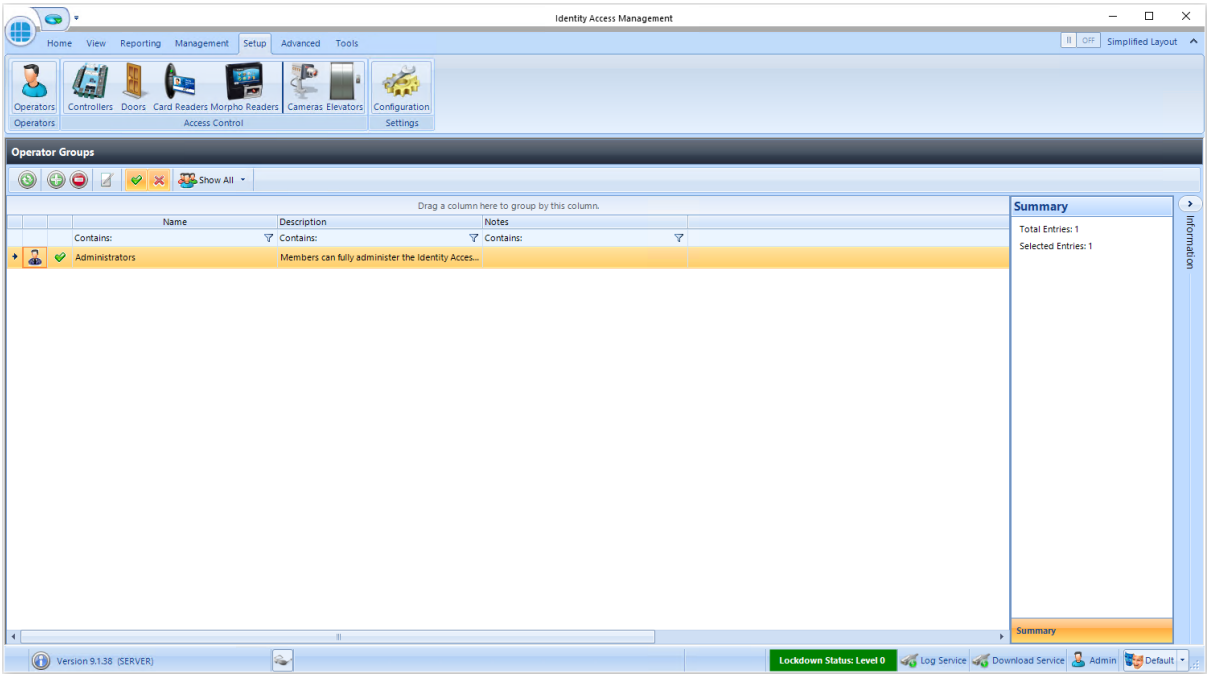
4. Configuring Operators

Operators are anyone authorised to access the Identity Access software. Operators can also be Users (usually Employees). If the PC is fitted with a Fingerprint Enrolment reader, operators who are also users can log into the software using their fingerprint, rather than entering a Username and Password.

Multiple Operators Groups can be configured, giving different restrictions from system functions (e.g. "Receptionists" can enroll visitors to the system whereas "Human Resources" can enroll Employees, Contractors and Visitors). An Operator Group may be given **Administrator** rights, and everyone in that Group will have full access to the software.

When the software is first installed, Controlsoft strongly advise that the credentials for the default Administrator is changed for security reasons. Furthermore, we recommend that the Installation Company create a new Administrator account for themselves, in case the end user forgets their password. Finally, we suggest that an operator group is created where members are restricted from functions that can affect the installed hardware.

Select **Operators** from the **Setup** tab to view the Operators window:



When first installed, there is just one Operator group called Administrators. This Administrators group comprises one member called Admin, with Username = Admin and Password = Password (both case sensitive).

The option buttons are:

 Refresh: Updates the list of operator groups

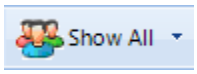
 Add: Creates a new operator group in the list

 Delete: Removes the selected operator group/s from the list

 Edit: edits the selected operator groups

 Show/Hide Active: This button will show or hide Operators who are Active.

 Show/Hide Inactive: This button will show or hide Operators who are not Active.

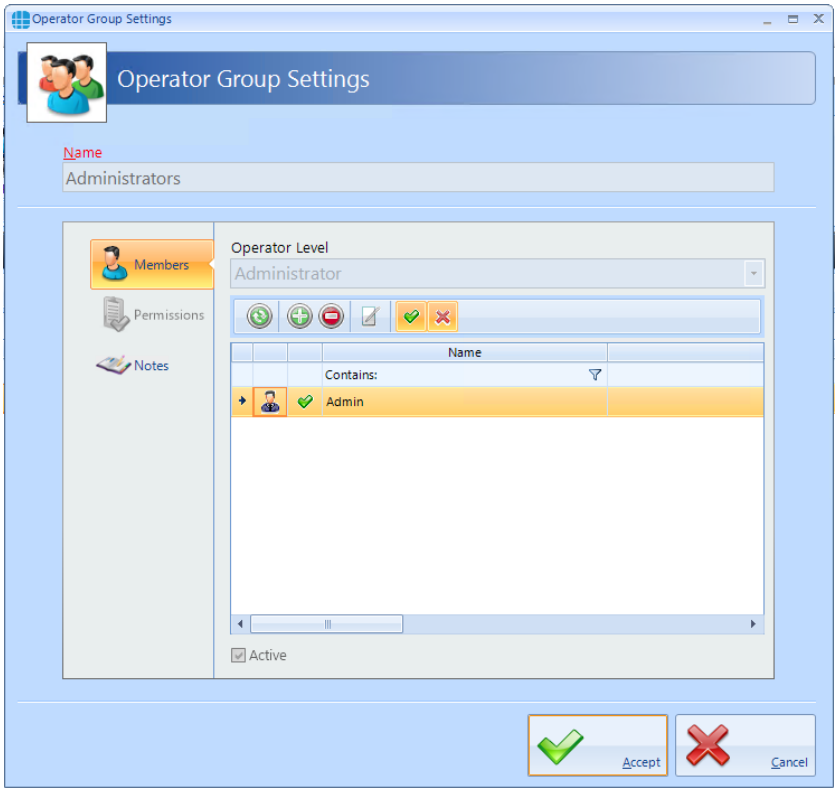


If there are many operator groups in the list, this option will either show all groups, or only Administrator groups, or only non-Administrator Operator Groups.

The **Summary** Box on the right-hand side indicates how many Operator Groups exist, and how many are currently selected.

4.1. Changing the Default Credentials

To change the credentials for the default Operator called Admin, double click on the Administrators group



The option buttons are:

Refresh: Updates the list of members

Add: Creates a new member to the list

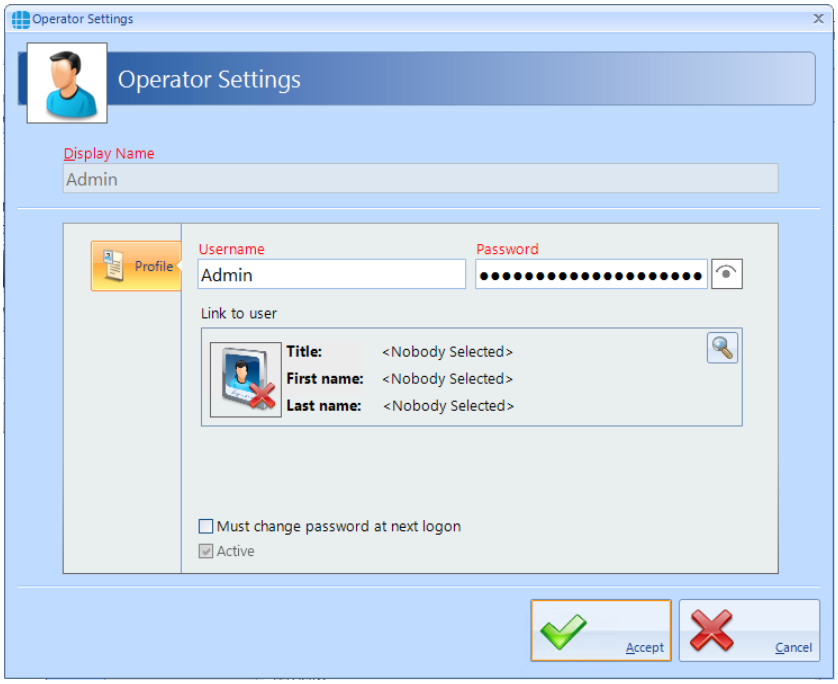
Delete: Removes the selected member/s from the list

Edit: edits the selected member

Show/Hide Active: This button will show or hide members who are Active.

Show/Hide Inactive: This button will show or hide members who are not Active.

To edit the member called Admin, double click the entry or click the Edit button:



The **Display Name** for the default Administrator cannot be changed.

Change the **Username** and/or **Password** as required. To check the password while entering it, click the 'eye' symbol to the right of the Password box.

NOTE: Once a Password has been entered, it can no longer be viewed.

NOTE: The default credentials are Admin and Password (both case sensitive).

If the Operator is also a User, it is possible to use their fingerprint to log onto the Identity Access software. To link the Operator to a User, click on the magnifying glass under **Link to user** and select the relevant User from the list that appears.

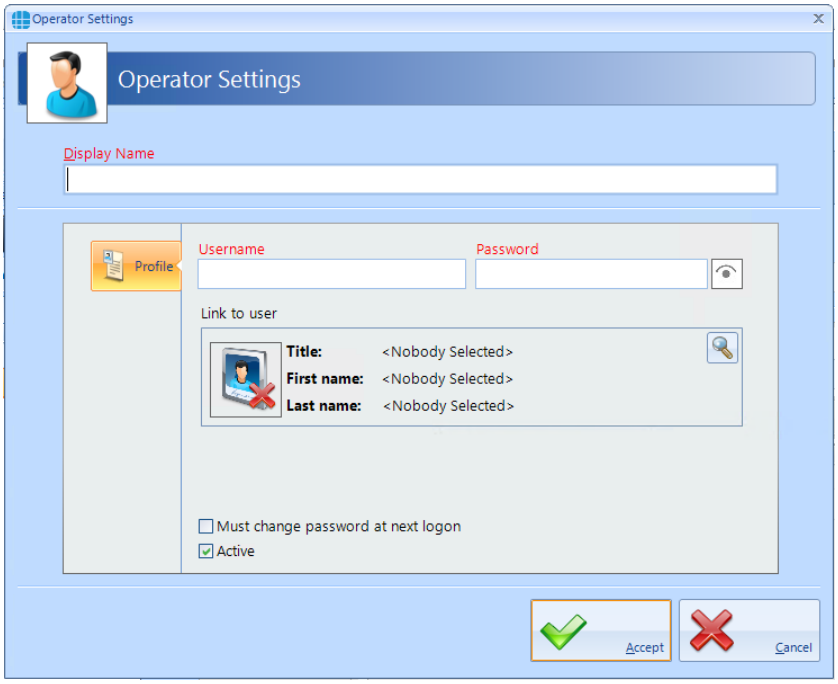
If the option **Must change password at next logon** is selected, the operator will be forced to change their password when they next log on to increase security.

Tick the option **Active** to make the operator active. Un-ticking this at any time will stop the Operator from working, without having to delete the Operator's details.

Click **[Accept]** when done.

4.2. Adding an Administrator

To Add a new Administrator to the group, double click on **Administrators** in the Operators window and click the **Add** icon:



Enter a name for the new Administrator under **Display Name**.

Enter a **Username** and **Password** as required. To check the password while entering it, click the 'eye' symbol to the right of the Password box. Once a Password has been entered, it can no longer be viewed.

If the Operator is also a User, it is possible to use their fingerprint to log onto the Identity Access software. To link the Operator to a User, click on the magnifying glass under **Link to user** and select the User from the list that appears.

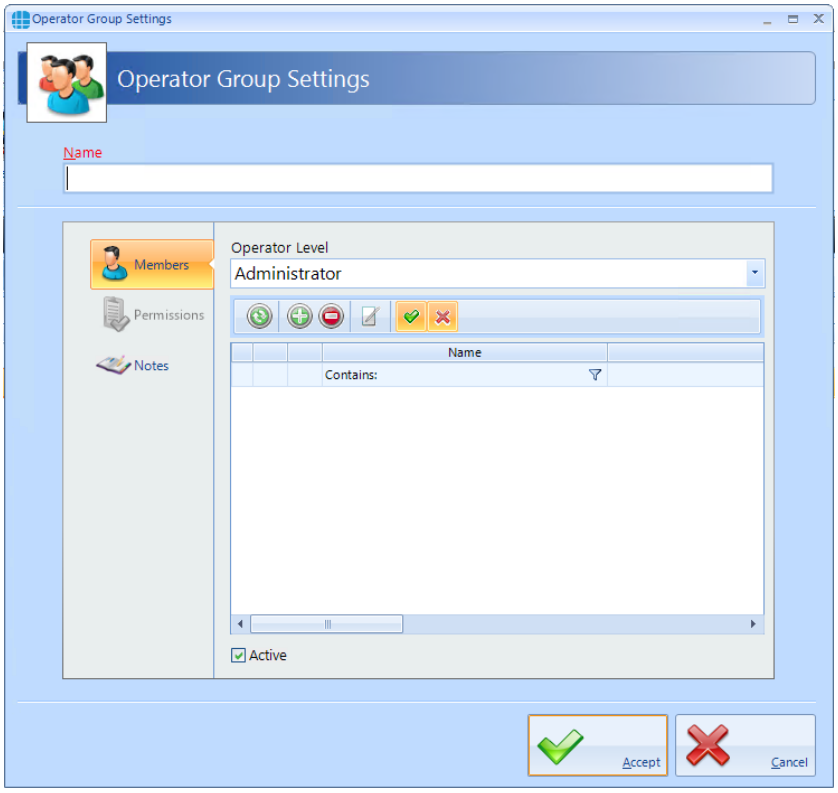
If the option **Must change password at next logon** is selected, the operator will be forced to change their password when they log on to increase security.

Tick the option Active to make the operator active. Un-ticking this at any time will stop the Operator from working, without having to delete the Operator's details.

Click [Accept] when done.

4.3. Adding an Operator

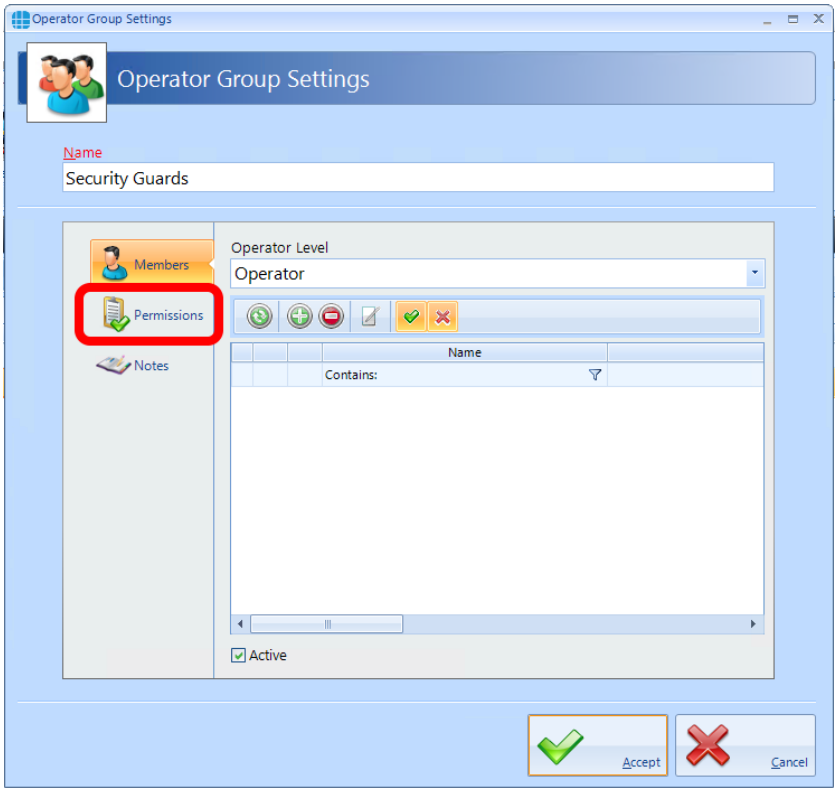
To Add a new Operator's Group to the software, click the **Add** icon in the **Operator Groups** window to display the **Operator Group Settings**:



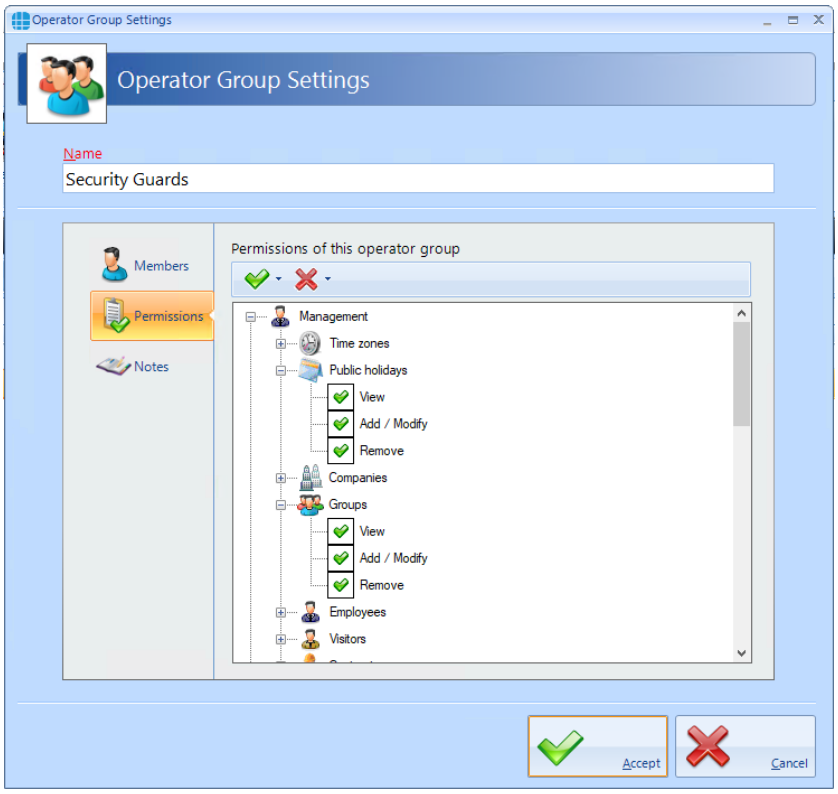
Enter a **Name** for the new Group.

Choose the required **Operator Level** from Administrator (able to access all functions within the software) or Operator (only has access to defined functions)

If Operator is selected, the Permissions tab in the left-hand side bar will no longer be greyed out allowing you to set the functions accessible to members of that group:



Select the Permissions tab

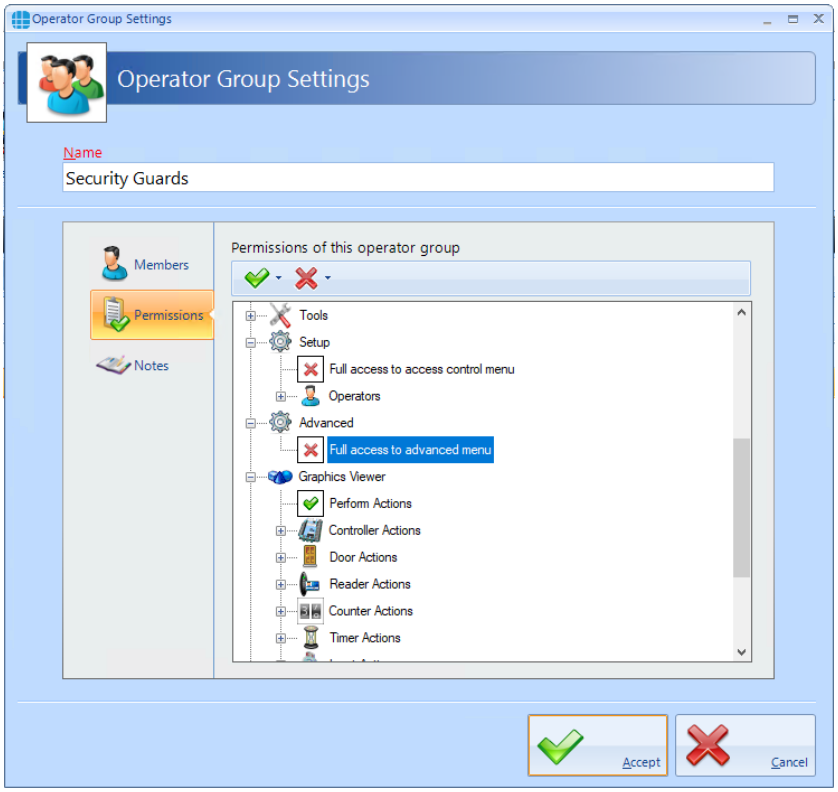


Double clicking an item will change the green tick to a red cross indicating that the item has been disabled. Double clicking the item again will enable it.

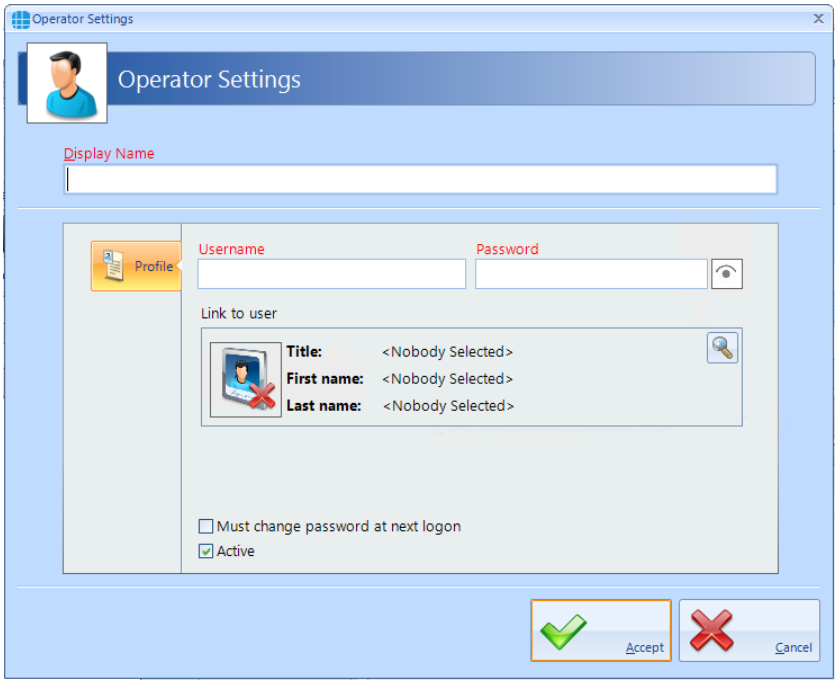
 will enable all items, selected items or all items within a permissions group

 will disable all items, selected items or all items within a permissions group

For example, to prevent all members of this Operator Group from accessing the Access Control and Advanced menus, scroll to the relevant items and double click the green ticks to change it to a red cross as shown below:



Select **Members** in the side bar, then select the Add icon  to add a new member within the group



Enter a name for the new Operator under **Display Name**.

Enter a **Username** and **Password** as required. To check the password while entering it, click the 'eye' symbol to the right of the Password box. Once a Password has been entered, it can no longer be viewed.

If the Operator is also a User, it is possible to use their fingerprint to log onto the Identity Access software. To link the Operator to a User, click on the magnifying glass under **Link to user** and select the User from the list which appears.

Tick the option **Must change password at next logon** to force the operator to enter a new password when they next log on.

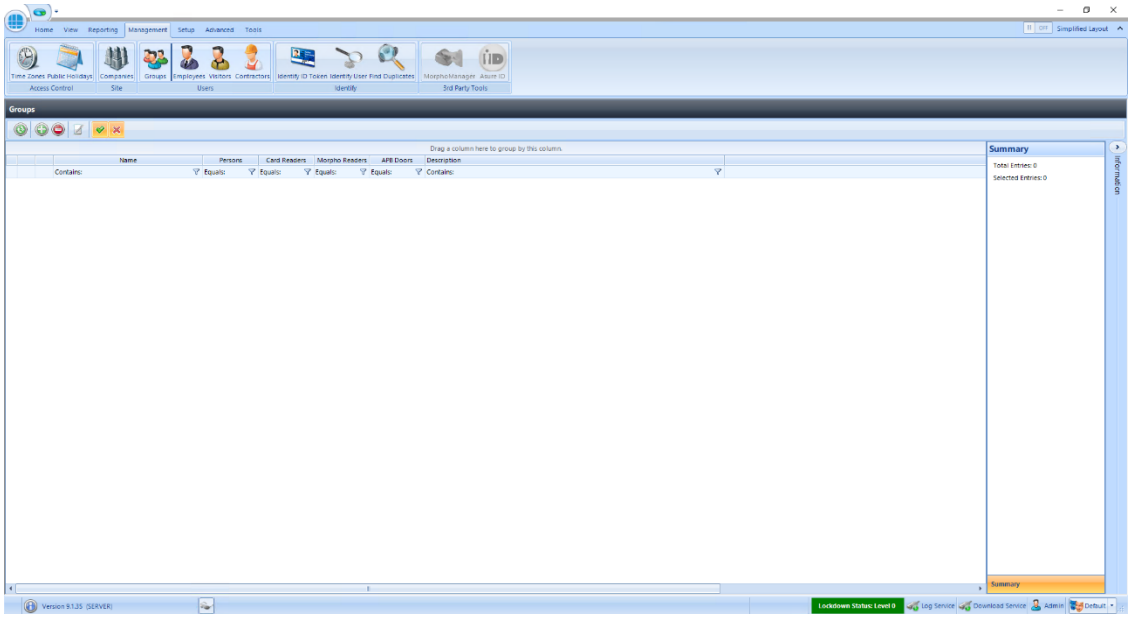
Tick the option **Active** to make the operator active.

Click **[Accept]** when done.

5. Configuring Groups

Each Group is allocated a combination of Readers and Time Zones, so each new user allocated to that Group will automatically inherit all the relevant "Access Rights".

To create a new Group, select the **Management** Tab, then select **Groups** from the ribbon bar.



This Groups window shows that there are no Groups in the database. The option buttons are:

 Refresh: Updates the list of Groups

 Add: Creates a new Group in the list

 Delete: Removes the selected Group/s from the list

 Edit: edits the selected Group

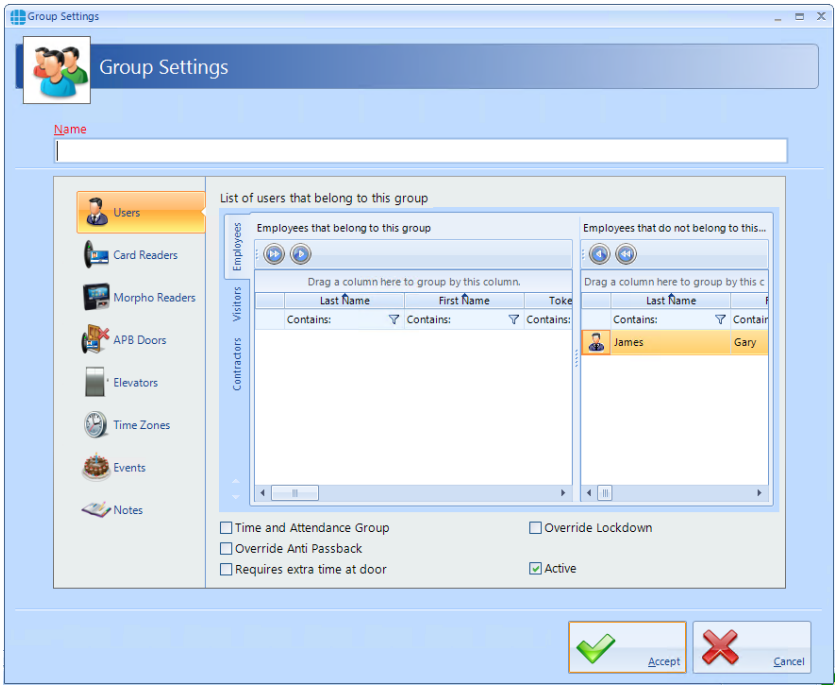
 Show/Hide Active: This button will show or hide Groups selected as Active.

 Show/Hide Inactive: This button will show or hide Groups not selected as Active.

Select the **Add** New button 

5.1. Creating Groups

To configure the Group, use the Group Properties Window:



Enter a **Name** for the Group

The **Employees that belong to this group** window displays users who are currently allocated to the group

Conversely, **Employees that do not belong to this group** displays all users who are NOT currently allocated to the group

To allocate one or more user to the Group, simply select the required user/s in the right-hand column and click the  button. To place all users in the group, use the  button.

Tick the **Time and Attendance Group** box if members of this Group are to be monitored for Time & Attendance.

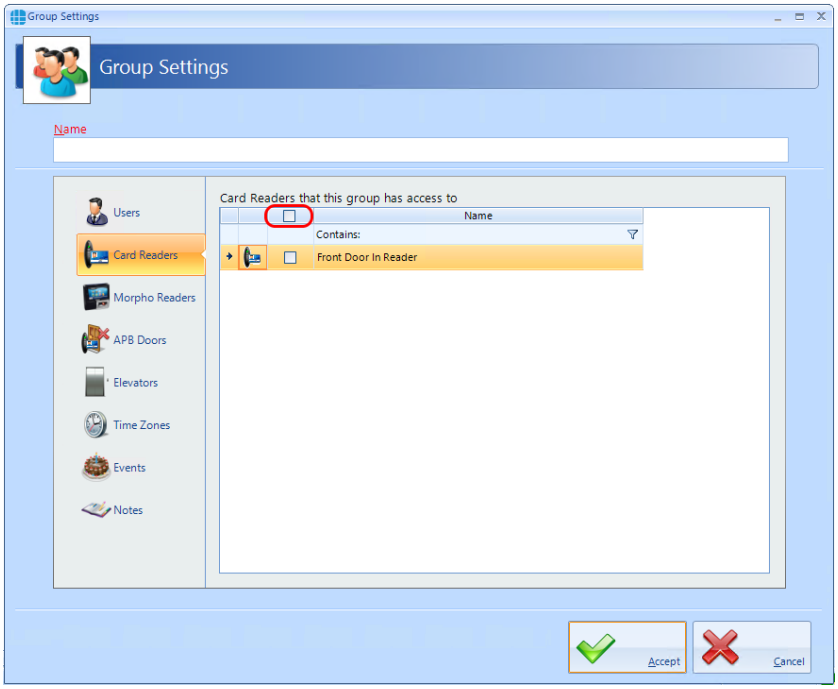
Tick **Overide Anti Passback** if members of this group are to be excluded from APB constraints.

Tick **Requires extra time at door** to use the Extended Door Open Time

Tick **Override Lockdown** for users in this group to operate doors during Lockdown Level 1

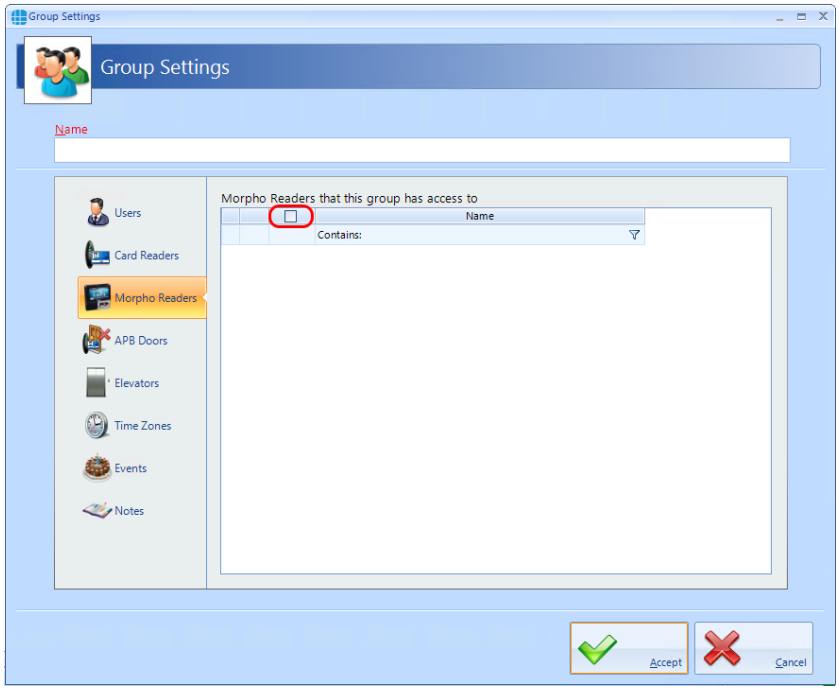
Tick the **Active** box to ensure that users in this Group are operational.

Select **Card Readers** in the side bar:



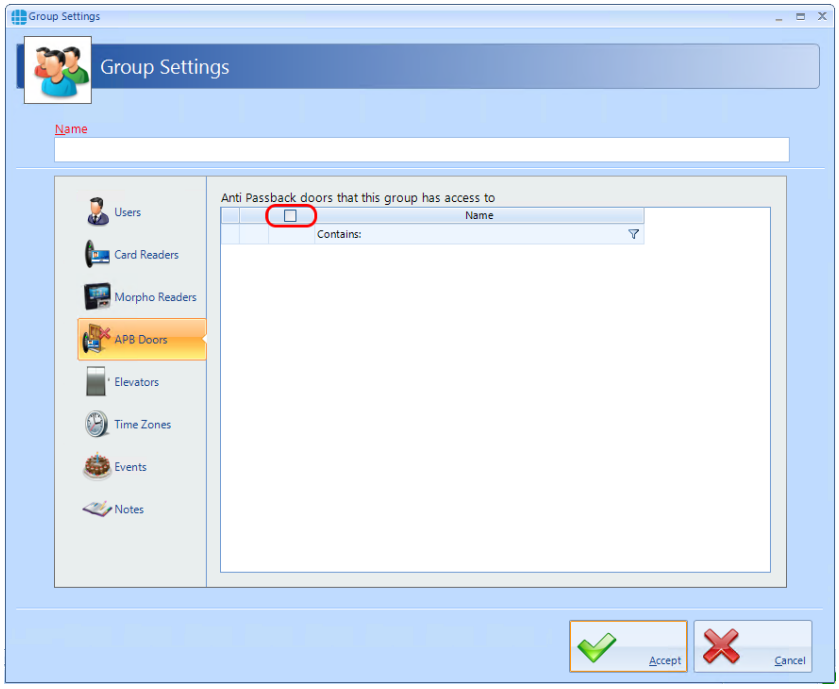
Select the readers that members of this Group will have access to. To select all readers, tick the **All** box highlighted above.

Select **Morpho Readers** in the side bar:



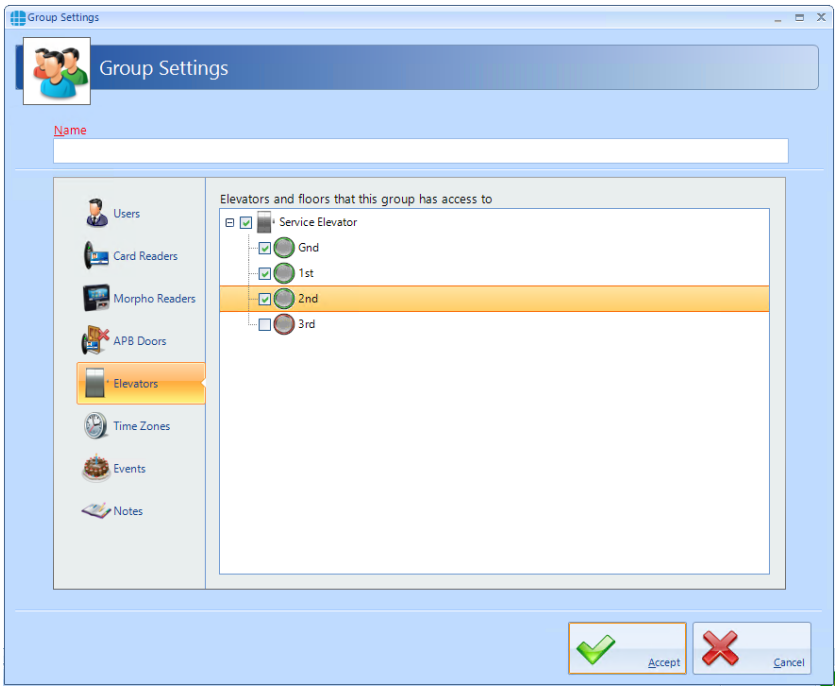
Select the Morpho (fingerprint) Readers that members of this Group will have access to. To select all readers, tick the **All** box.

Select **APB Doors** in the side bar:



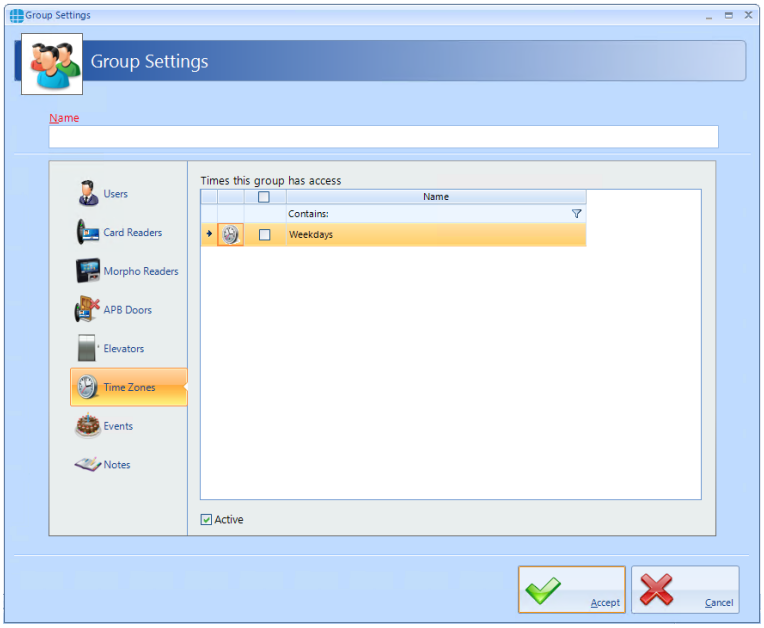
Select one or more Doors where members of this Group will be subject to AntiPassBack

Select the **Elevators** in the side bar to define which floors are accessible to users in this group:



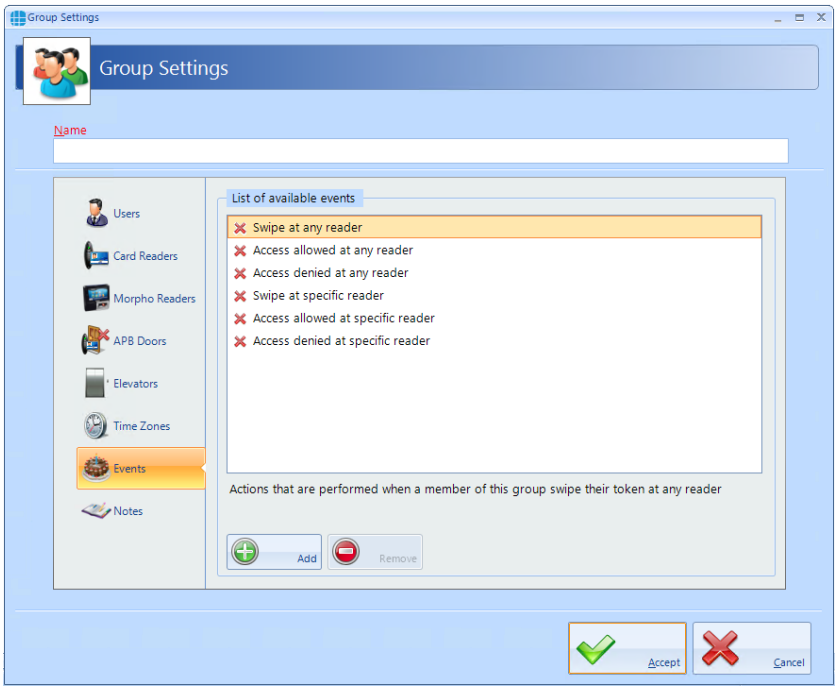
Tick all the floors to be accessible to these users.

Select **Time Zones** in the side bar:



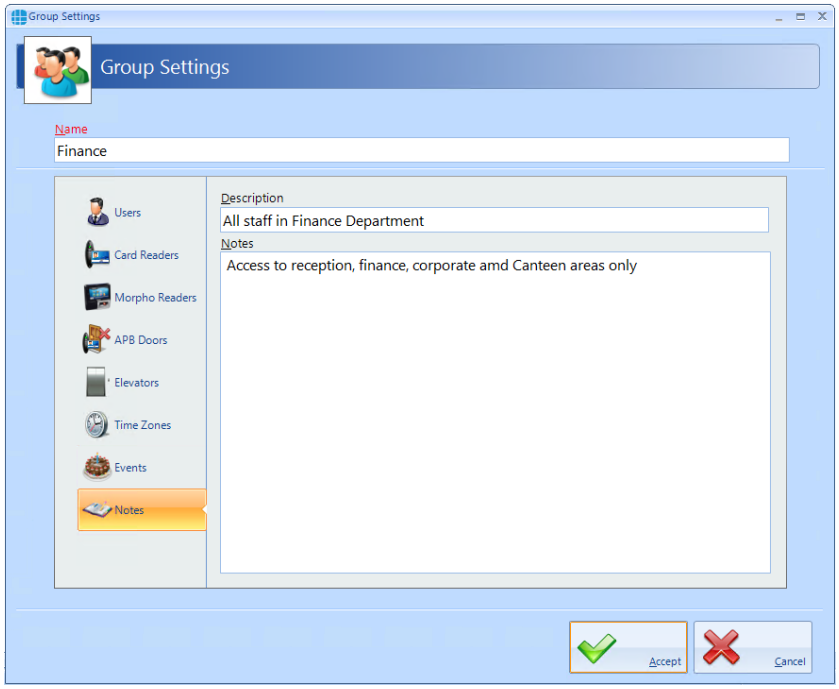
Select the Time Zone that members of this Group will have access to (information on how to add a Time Zone can be found on Page 49).

The Events section will indicate whether any Events have been configured for the selected group



In this example, no Events have been created for the selected group. Clicking the **[Add]** button will allow Events to be created, although this is more easily done via the **Events** button in the **Advanced** tab, where all Events and related Actions can be viewed.

The **Notes** section, accessed from the side bar, provides 2 text fields called **Description** and **Notes** to help a Service Engineer during their first visit:



5.2. Allocating Users to Groups

A user can be allocated to a Group in one of 2 ways:

1. From within the User Properties Window.

2. From within the Group Properties Window.

NOTE: Users can be allocated to more than one Group, but please be aware that in versions prior to v2017.1 constraints exist when multiple Groups are combined:

EXAMPLE:

Group 1 has access to Reader A from 10:00 to 11:00

Group 2 has access to Reader B from 12:00 to 13:00

A user allocated to Group 1 AND Group 2 will have access through BOTH readers from 10:00 to 11:00, AND will have access through BOTH readers from 12:00 to 13:00

6. Users

"Users" is a collective term for Employees, Visitors and Contractors. These user types have been separated as they often have different requirement for Access Rights, for example:

Employees may have very flexible access to the premises for long periods of time.

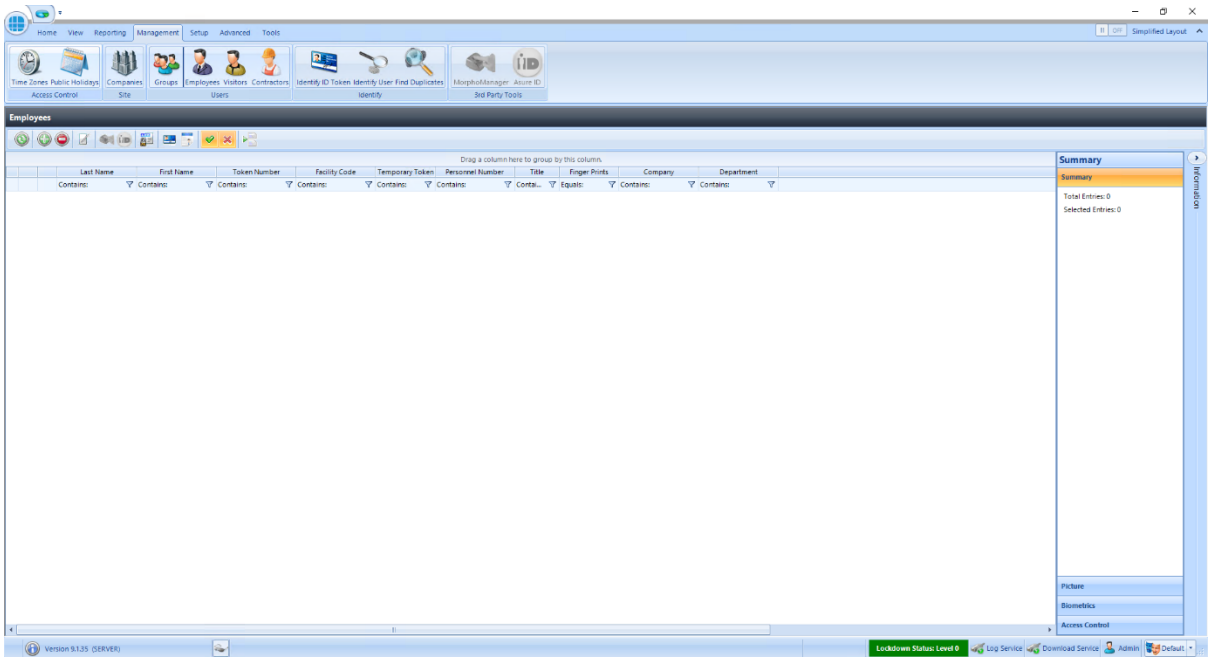
Visitors may have limited access to the premises and may be heavily managed on a day to day basis.

Contractors may have flexible access to the premises but only for short periods of time.

Furthermore, separating Employees, Visitors and Contractors makes reporting on each type of user easier and more flexible.

NOTE: Programming screens for Employees, Visitors and Contractors are the same. Only programming screens for Employees has been shown for brevity.

Select the **Management** tab, then select **Employees** from the ribbon bar:



The option icons are as follows:

 Refresh: Updates the list of Users

 Add: Creates a new User to the list

 Delete: Removes the selected User/s from the list

 Edit: edits the selected User

 Enrol fingerprint using MorphoManager: This icon will be greyed out (as shown) if MorphoManager is not enabled.

Print: Prints a card for the selected user

 Report: Run an access log report for the selected user

 Temporary Token: Assign or remove Temporary Token for a User

 Import: Adds a new User to the list from a vCard

 Show/Hide Active: This button will show or hide Users selected as Active.

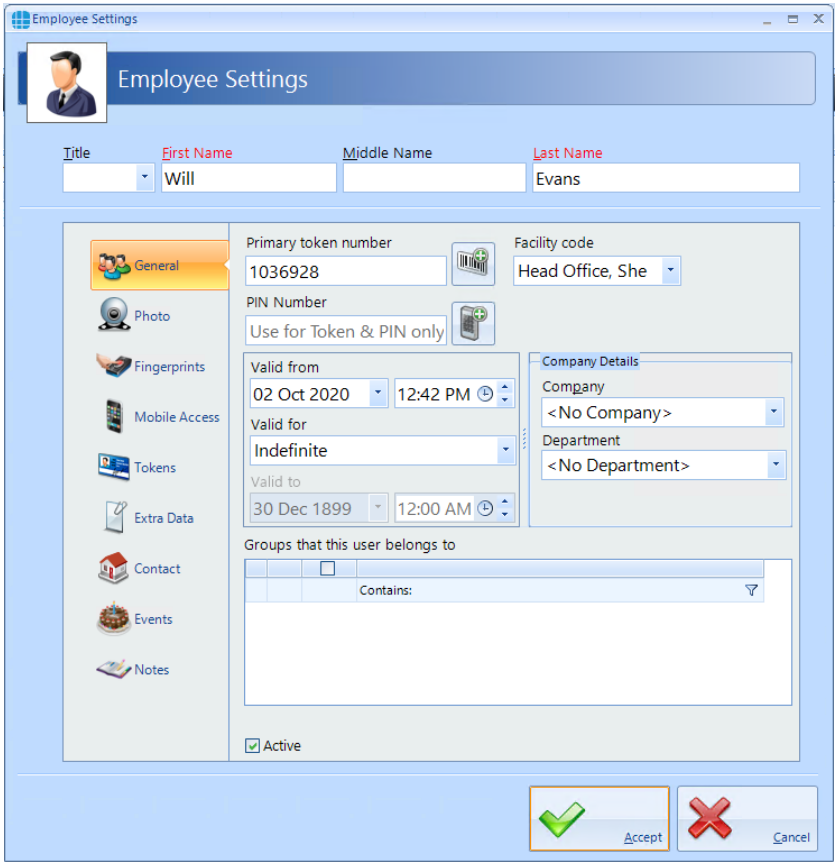
 Show/Hide Inactive: This button will show or hide Users not selected as Active.

 Paging Mode: Splits the list of users into manageable pages to avoid too much scrolling up and down.

NOTE: Any changes made to Users (Employees, Visitors and Contractors) will automatically be downloaded to the Controllers and/or Biometric Readers

6.1. User General

To create a new Employee, select the **Add** New  button:



Enter the **First Name** and **Last Name** of the user (**Title** is optional).

Enter the **Primary Token Number** of the card allocated to this user. This may be written on the card, read via an Enrolment reader, or may be a sequential number in systems using fingerprint only. Pressing the icon to the right of the Token Number field will automatically generate a token number. This is useful when using fingerprint readers.

The **Facility Code** dropdown list displays all the Facility Codes relevant to this system, simply select the appropriate one for this employee (in this instance, the employee works at the Head Office). This ensures that another card with the same number (1036928) but a different Facility Code will not be granted access. ***NOTE: If Facility Codes are not enabled in the IA Configuration utility, this field will be greyed out.***

If the system has readers with a keypad, enter a **PIN Number** for the user. Pressing the icon to the right of the PIN Number field will automatically generate a PIN. ***NOTE: If you are using keypads in 'PIN Only' or 'PIN OR Proximity' modes, the required PIN Number should be added as a Token Number.***

The user will have no access to the system until the **Valid from** date and time (the default is the date that the user profile was created). Similarly, the user will have no access to the system after the **Valid for** expires (default is Indefinite, but this can be changed in the Server Configuration utility).

Allocate the user to a **Company** and a **Department** (if used). Companies and Departments can be a useful filter when running reports on users.

Groups that this user belongs to lists all the available Groups within the system. To allocate the user to a group, simple tick the box for that group.

Ensure that the **Active** box is ticked for this user to have access to the system

NOTE: Users can be allocated to more than one Group

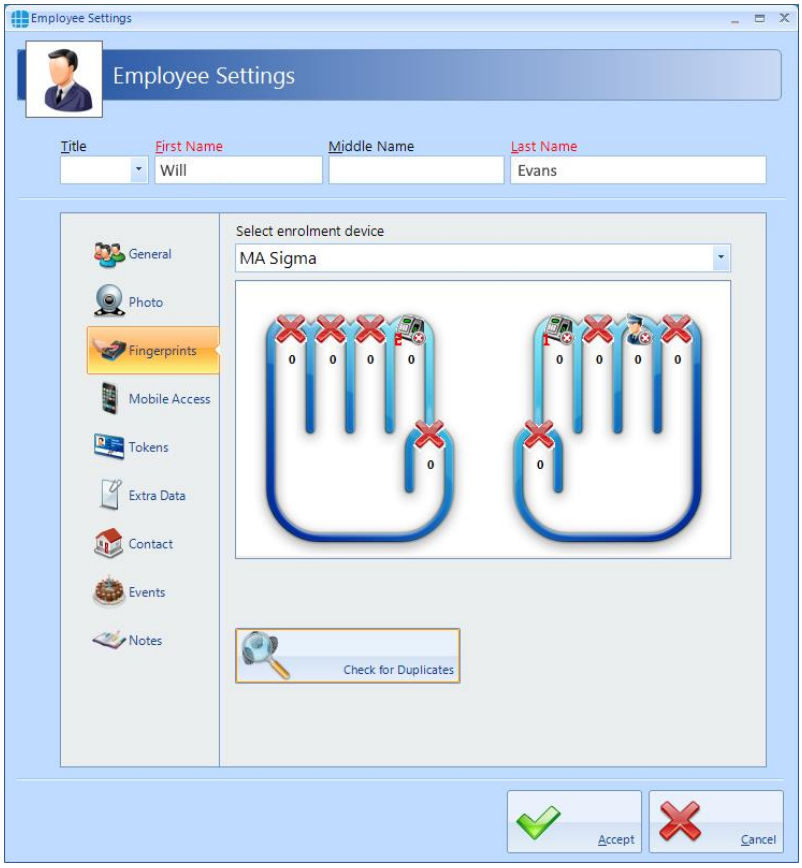
6.2. User Photo

Allocating a photo to a user can be useful when identifying a lost card as it is possible to read the card and display the photo and other details of the relevant user. As standard there are two Reader Monitors located in the Dashboard to view the photos of people entering and exiting the premises.

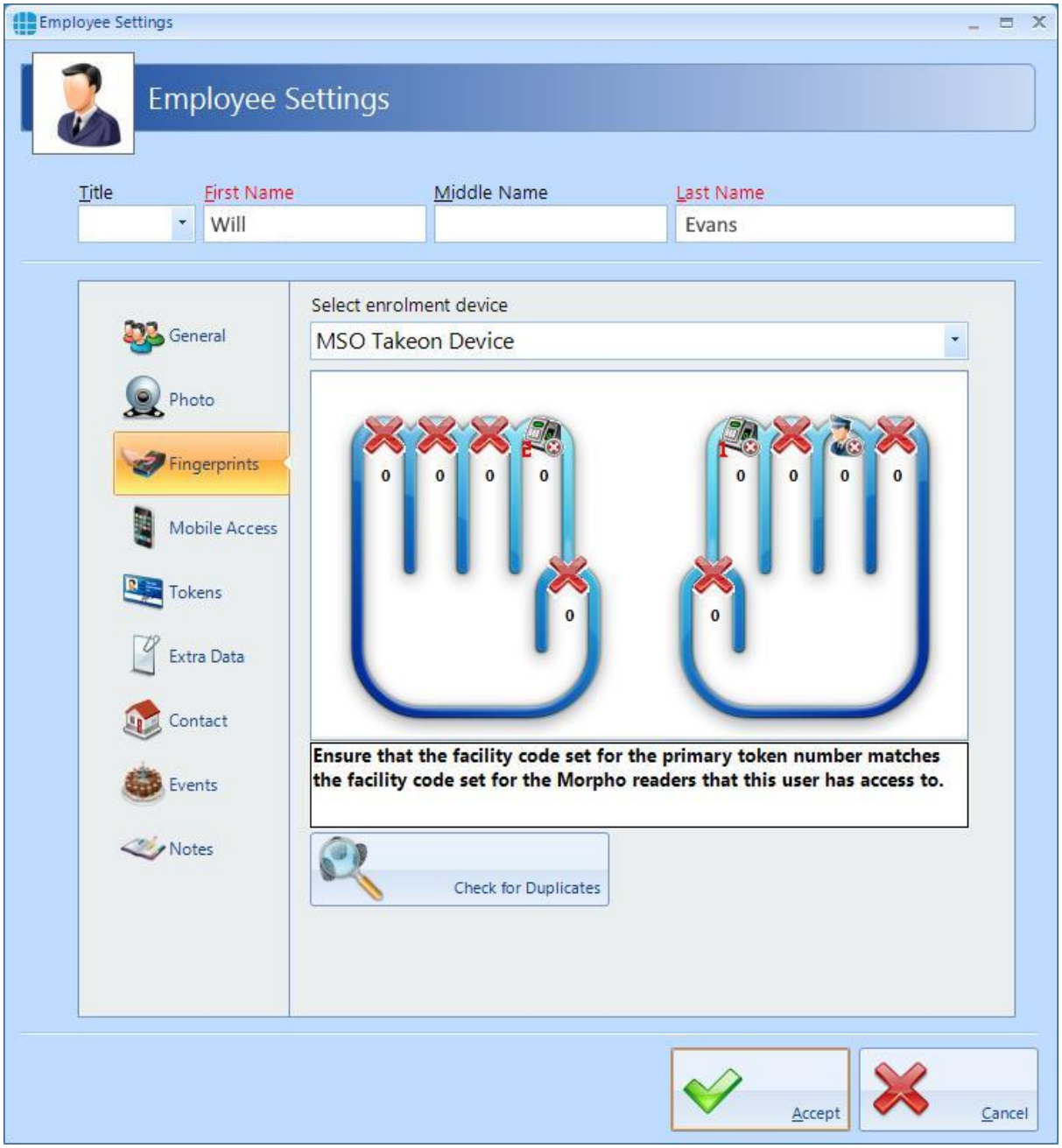
Select the import icon  to import a previously saved image. It is possible to import a .jpg or .png picture file. The camera icon  can be used to capture a photo from a webcam.

6.3. User Fingerprints

To enrol a fingerprint for a user, first define the enrolment device to be used. This could be an "MSO Takeon Device" such as an MSO-300 or MSO-1300, or, if configured, a fingerprint reader at a particular door.



NOTE: If Facility Codes have been specified for the Morpho reader, the screen will include a prompt to ensure that the Facility Codes entered for the user matches the Facility Code of the relevant Morpho readers



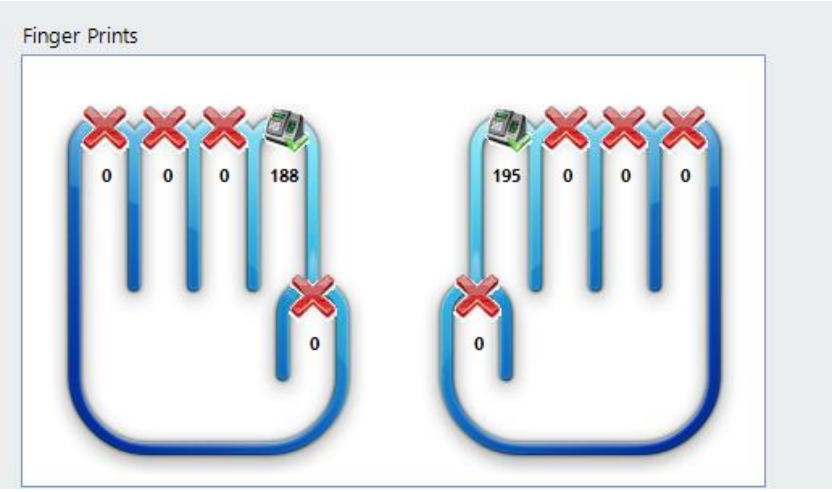
Enrol a fingerprint as follows:

Specify the finger to be enrolled by left-clicking on the required fingertip, then select **Assign** from the Option Wheel:

Place the selected finger on the enrolment reader 3 times, following the on-screen instructions where necessary.

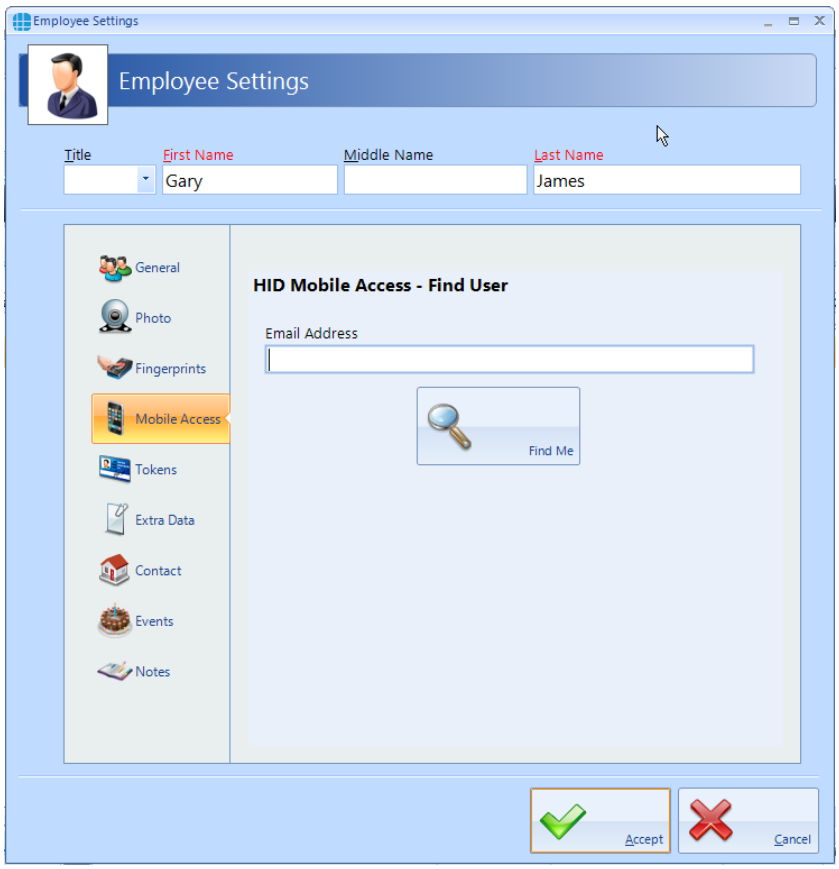
Assign a second finger. Qualify that both fingers have been enrolled and the score is satisfactory.

NOTE: The higher the enrolment scores the better the biometric reader will perform on a day to day basis. It may be necessary to enrol multiple fingerprints and use the fingerprints with the highest score.



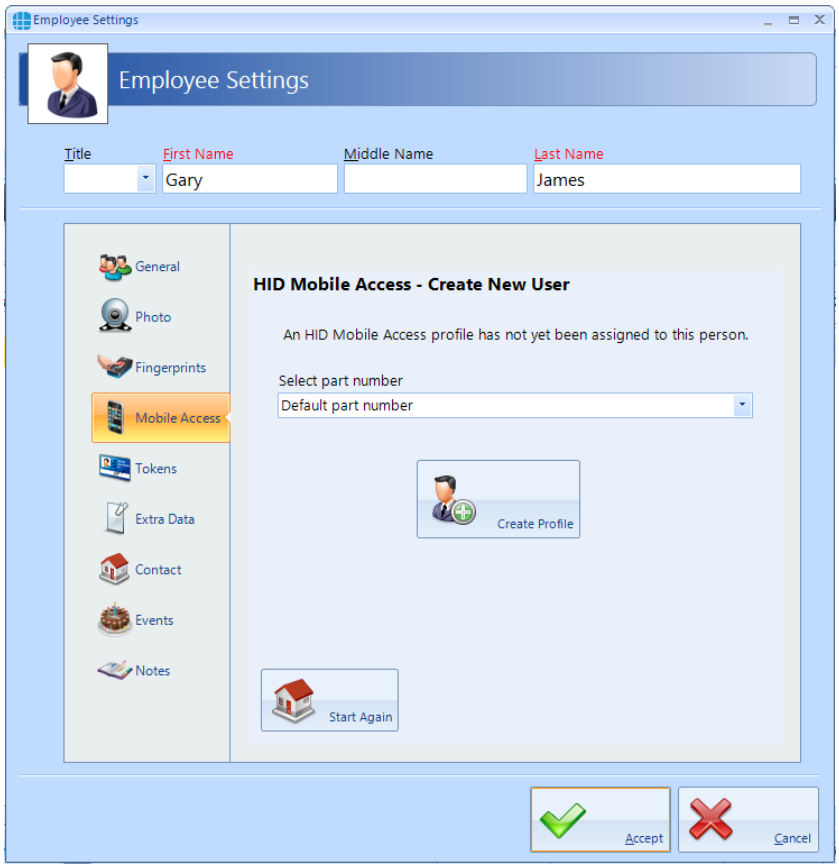
6.4. User Mobile Access

If you have a Mobile Access account, you can allocate mobile credentials from within Identity Access.

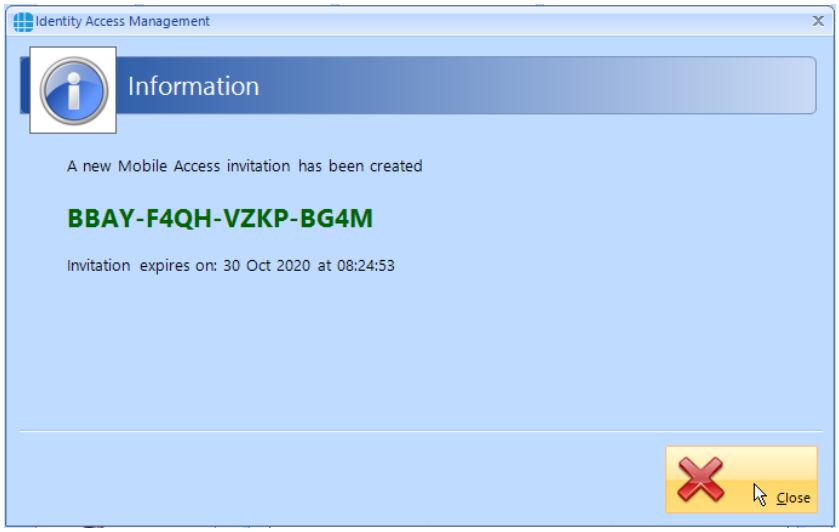


Having first entered the required information in the **General** screen and the user's email address in the **Contact** screen, select the **Mobile Access** tab and click **[Find Me]**

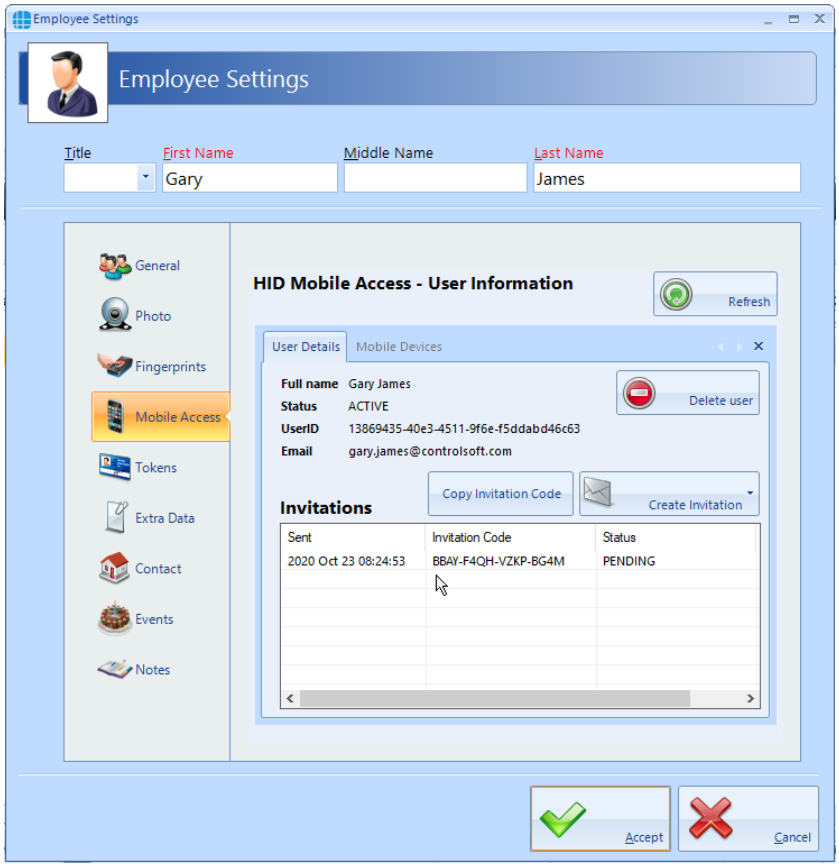
If the employee has never been issued with a Mobile Access credential, the following screen will be displayed



Leave the part number as **Default part number** and click on the **[Create Profile]** button. Once the system has created the profile for this employee, the invitation code will automatically be emailed to that employee (assuming that the option is selected in the IA Configuration utility)



Click **[Close]** and the next screen shows the Invitation Status as **PENDING**



NOTE: This invitation code is time limited and must be activated promptly.

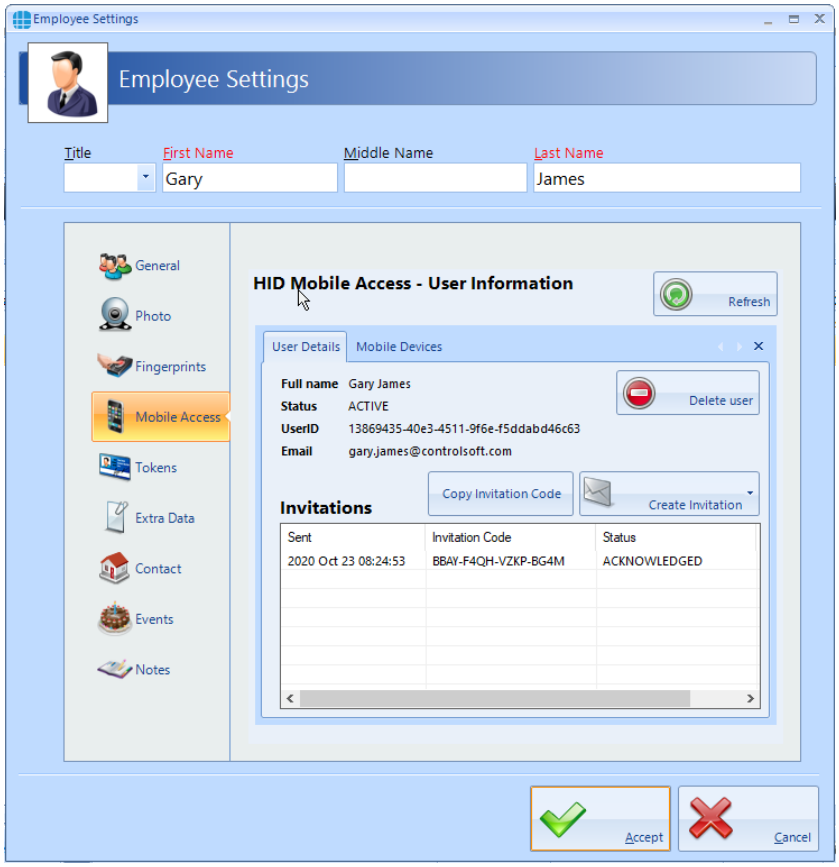
The employee now needs to download and install the HID Mobile Access app on their phone. This is a free app available from the Google Play Store for Android phones, or from the App Store for Apple phones.

Open the app and select "**Start using the services**"

Enter the invitation code and click **[REGISTER]**

Look through the instruction on how to use HID Mobile Access or click **[Skip]**

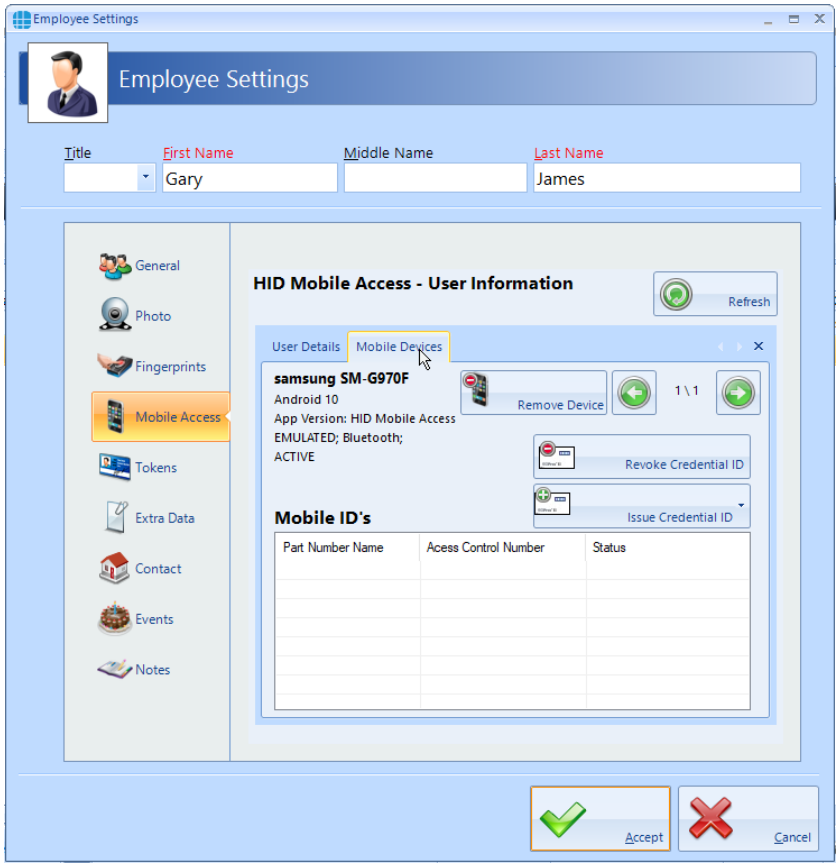
In the Identity Access User Information screen, click the **[Refresh]** button



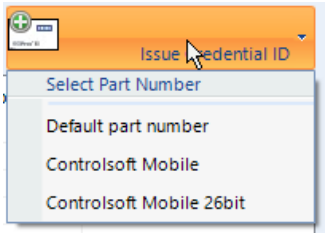
The Invitation Status is now showing as **ACKNOWLEDGED**.

NOTE: An option exists in the IA Configuration utility called "Issue Mobile Credential ID with invitation". If this option has been selected, the invitation Status will now show as ISSUED and the next few instructions can be ignored.

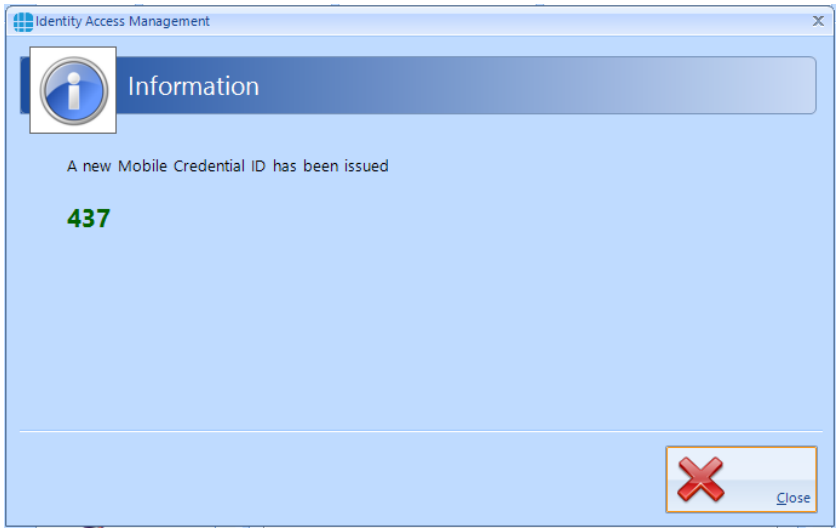
Select the **Mobile Devices** tab



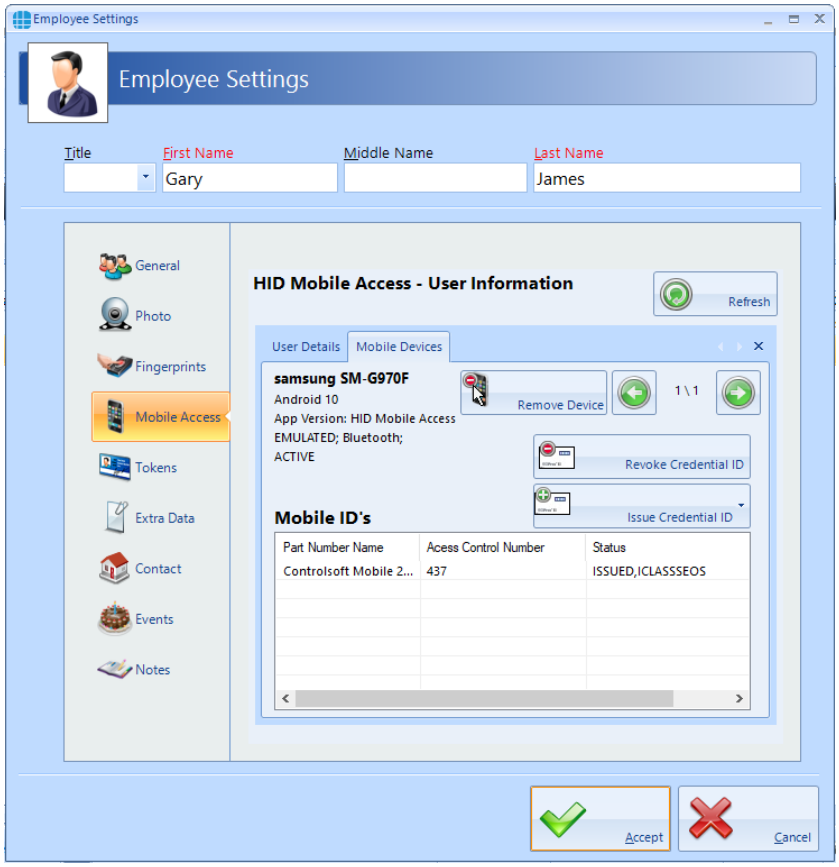
Now click the **[Issue Credential ID]** button and select the type of credential required, either **Default part number** or a specific type if different credentials are available.



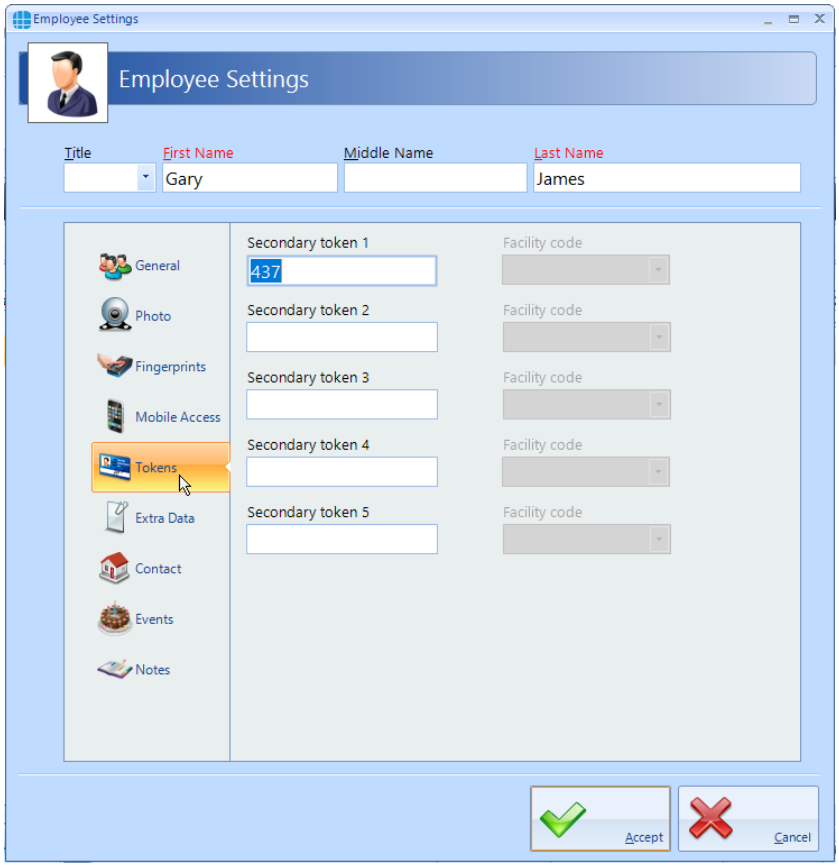
An information box will now show the credential number issued



Click **[Close]** and the screen will be updated showing the status of credential 437 as **ISSUED**.

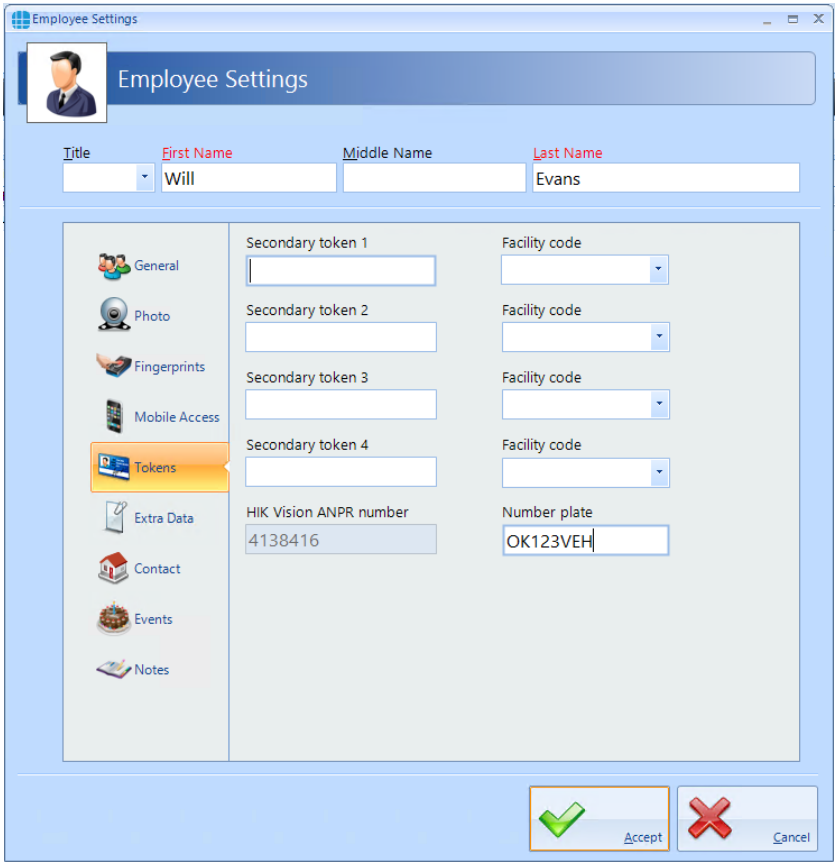


Finally check that the credential has been allocated to the employee. In this screenshot below, it has been allocated to Secondary Token 1, although this can be configured in the IA Configuration utility



6.5. Multiple Tokens

Each user can be given more than 1 token to allow for multiple credential types (e.g. an Employee may have a card, a mobile credential and a windscreen tag for the car park). The **Tokens** tab allows these secondary credentials to be allocated to the user. Whichever credential is used, it will be recognised and the same user, hence Fire Roll Call, AntiPassBack etc. will continue to operate correctly.



The titles **Secondary token 1**, **Secondary token 2** etc. can be renamed in the IA Configuration utility to provide more meaning titles such as "Mobile Credential" or "Windscreen Tag".

If the Use HIK Vision ANPR option is enabled in the IA Configuration utility, then Secondary Token 5 will automatically be renamed to **HIK Vision ANPR number** as in the above screenshot. This field will be filled in automatically when a vehicle number plate is entered into the **Number plate** field.

NOTE: The ANPR number plate must be unique

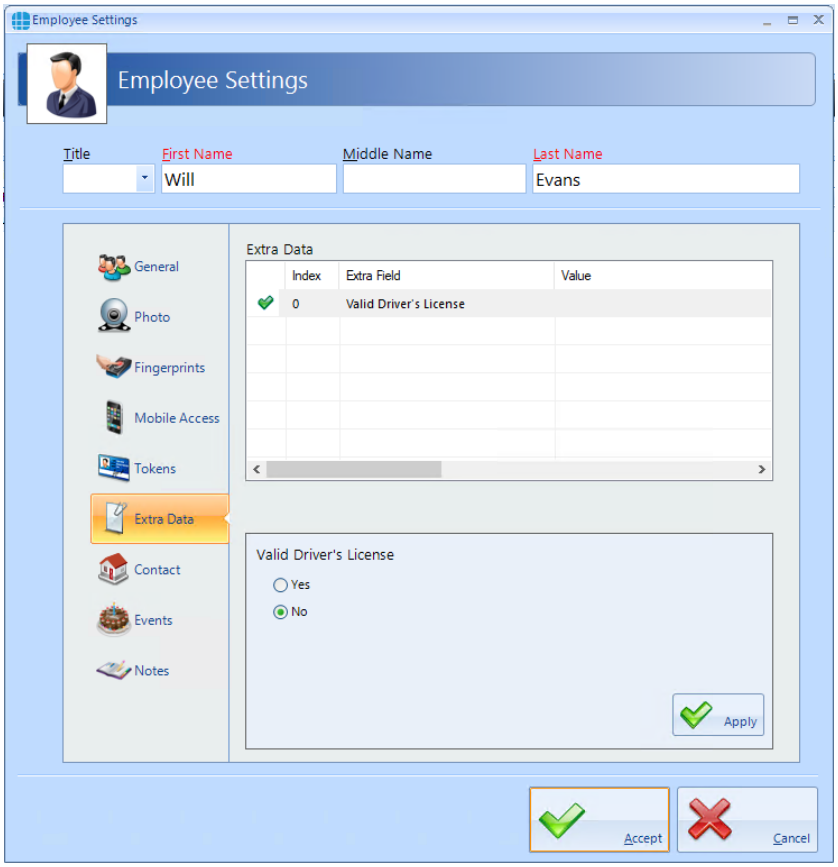
Please contact your installer / maintenance company for assistance in changing these options.

6.6. User Extra Data

It is sometimes useful to have additional information logged against a user, depending on the work environment. For example, a Courier company may want to log whether a driver has a valid driving license, store the expiry date of the license or even store a scan of the license itself.

The Extra Fields are configured within the IA Configuration software (ask your installer / maintenance company for further information on this).

To use an Extra Field previously configured, select the **Extra Data** tab:

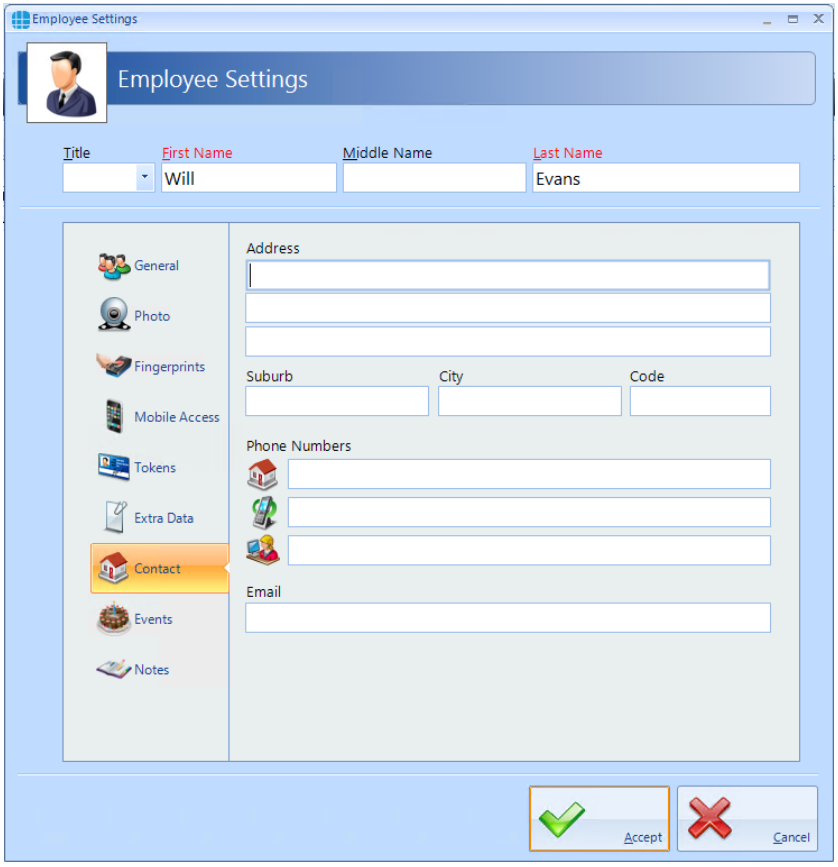


In this instance, the Extra Data Field has been configured to record whether the user has a valid driver's license. Simply select **Yes** or **No** as appropriate, followed by **[Apply]** and **[Accept]**.

The Extra Data tab can display a variety of information as the data fields can be text, numeric, lists, checkbox, date, time, or image.

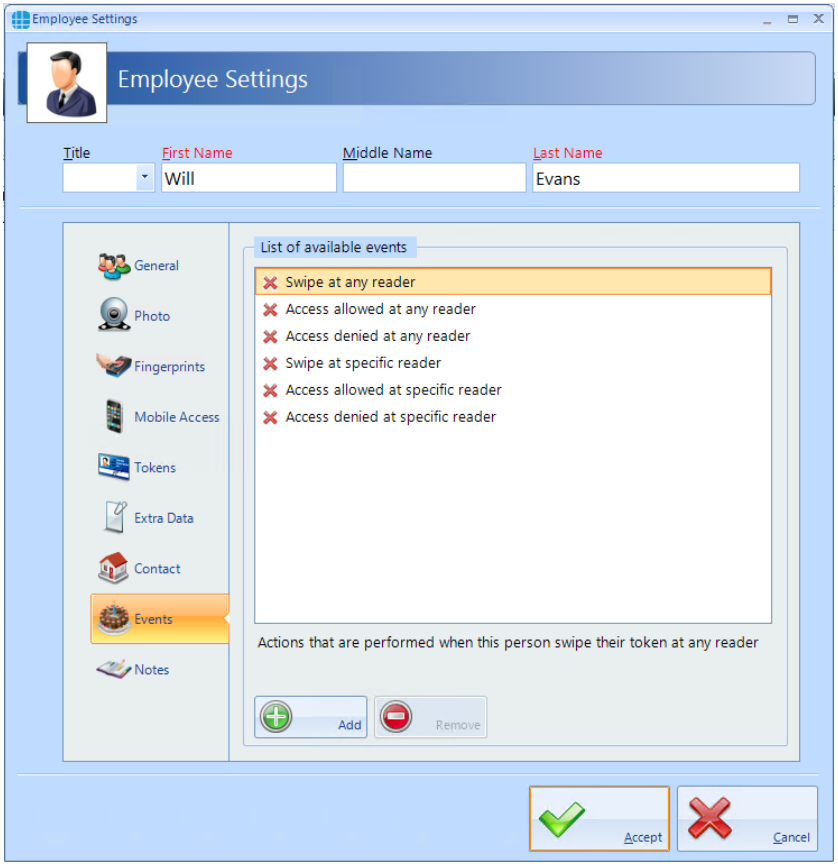
6.7. User Contact

The Contact Details in this tab are not mandatory, but can be recorded if required:



6.8. User Events

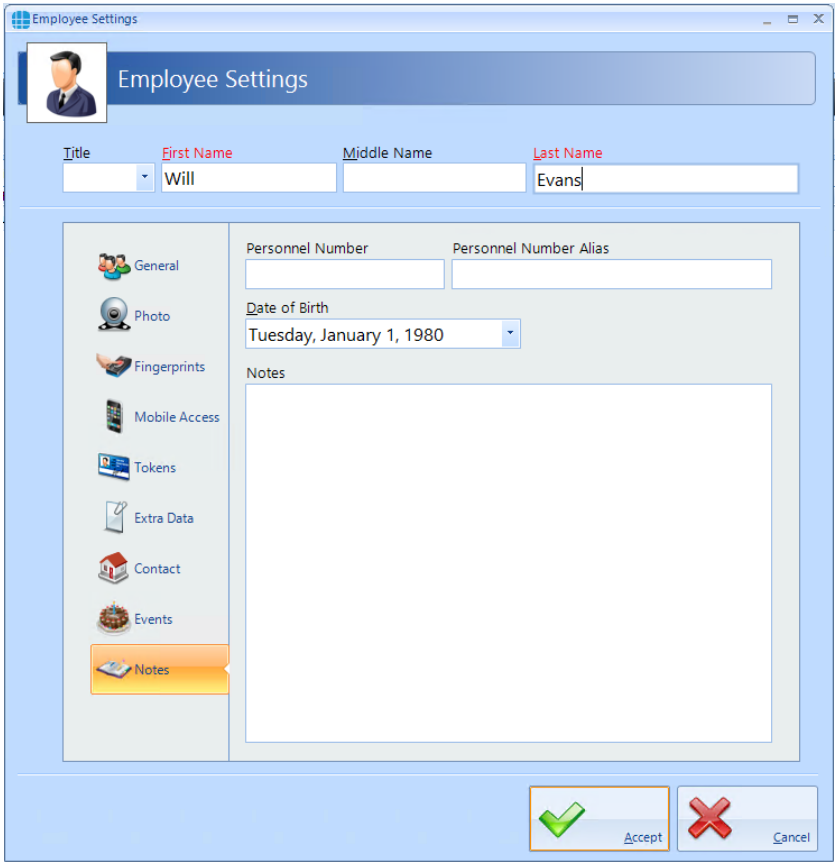
The Events tab will indicate whether any Events have been configured for the selected user



In this example, no Events have been created for the selected user. Clicking the **[Add]** button will allow Events to be created, although this is more easily done via the **Events** button in the **Advanced** tab, where all Events and related Actions can be viewed.

6.9. User Notes

Information in this tab is not mandatory, but can be recorded if required:



The **Personnel Number** is displayed in the Employee Properties screen and can be selected to be unique via the IA Configuration utility.

6.10. Importing Users

It is possible to import multiple users into Identity Access from another Controlsoft application (Controlsoft Lite, Controlsoft Pro or CWBio), or any other application capable of exporting its user database to a **.csv** file.

When importing from a Controlsoft application, Identity Access knows the data layout, so it is only necessary to point to the database.

When importing from a .csv file, it is also necessary to map the fields in the file to the correct fields in Identity Access.

To import data, select **Import Data** from the **Tools** menu and follow the Import Wizard:

Under **Select Import Source**, select the appropriate source, for example, to import from a csv file, select **Text File** from the dropdown list and click **[Next]**

Under **Source File**, click the **[...]** button to browse to the .csv file. Select **Delete old data before importing new data** if required. Click **[Next]**.

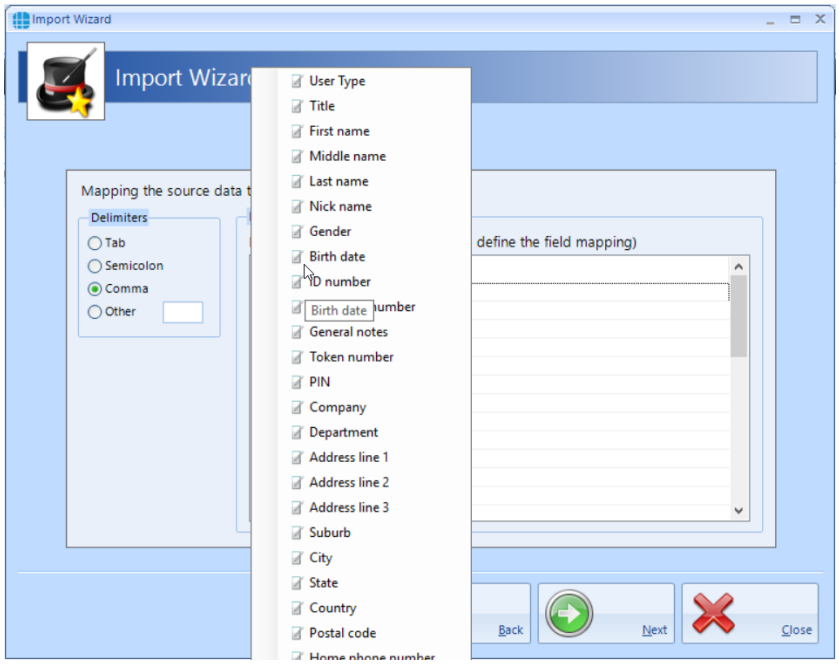
Select Destination should be set to define the types of user being imported (Employee, Visitor or Contractor). Select **Ignore duplicate names** to avoid duplicate entries. Click **[Next]**

NOTE: While this will stop a User appearing in the list twice, it will also stop a new User from being imported if they have the same name as an existing User. To avoid this, always ensure that there are differences between similar names (e.g. Fred Smith, Fred A Smith and Freddie Smith)

Selecting the source file's format defines how the .csv file is configured (the actual settings required will depend on how the .csv file has been configured). Click **[Next]**

Under **Delimiters**, choose which character has been used in the .csv to separate data (usually commas or tabs).

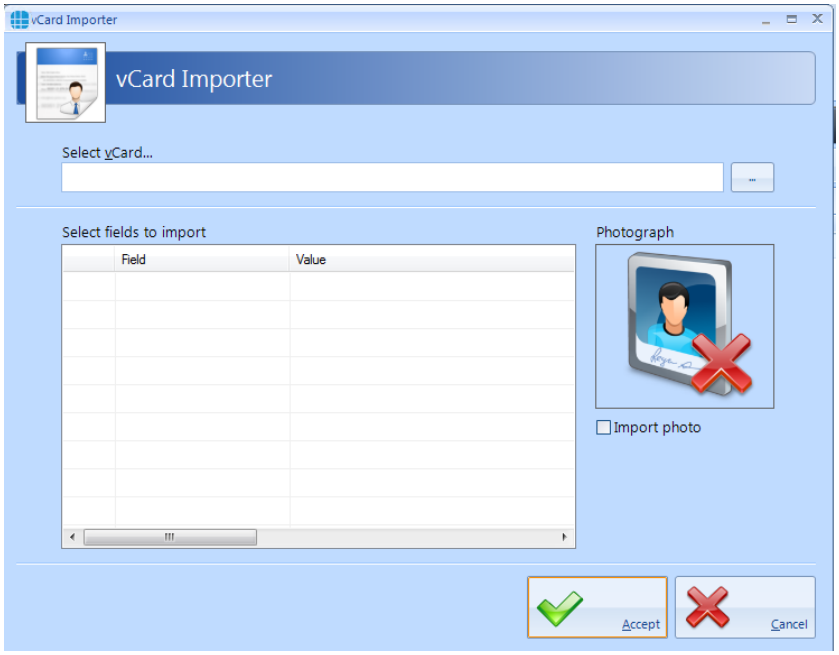
Under **Data Preview**, link each column in the .csv file to the corresponding database field. Click on each column header and select the required field from the dropdown list:



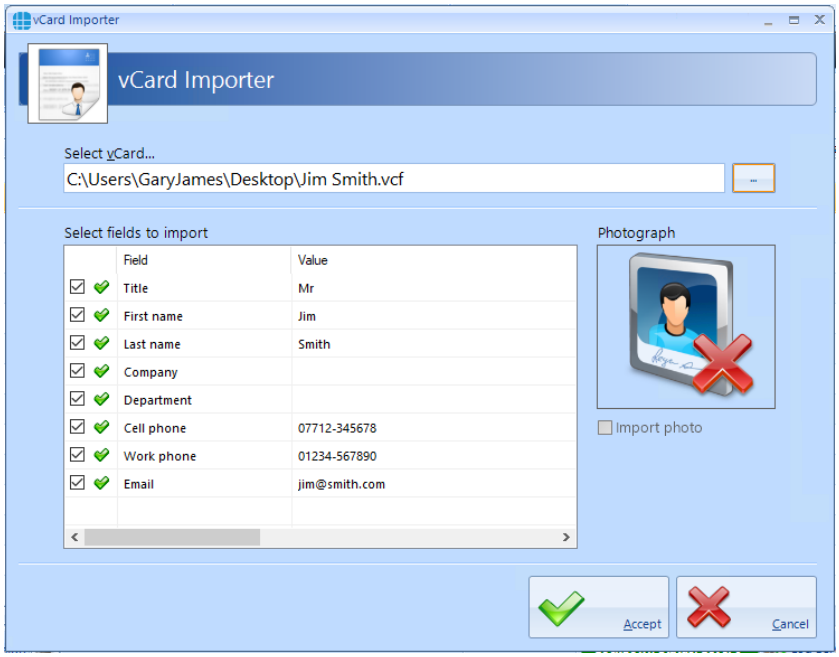
When complete, click **[Next]**, followed by **[Import]** to start the import process and **[Close]** when the import is complete.

Identity Access also has the facility to import a user via a "vCard" which can be created from some email clients such as Microsoft Outlook. To import a vCard, select Employees from the Management tab, then select the **Import** icon 

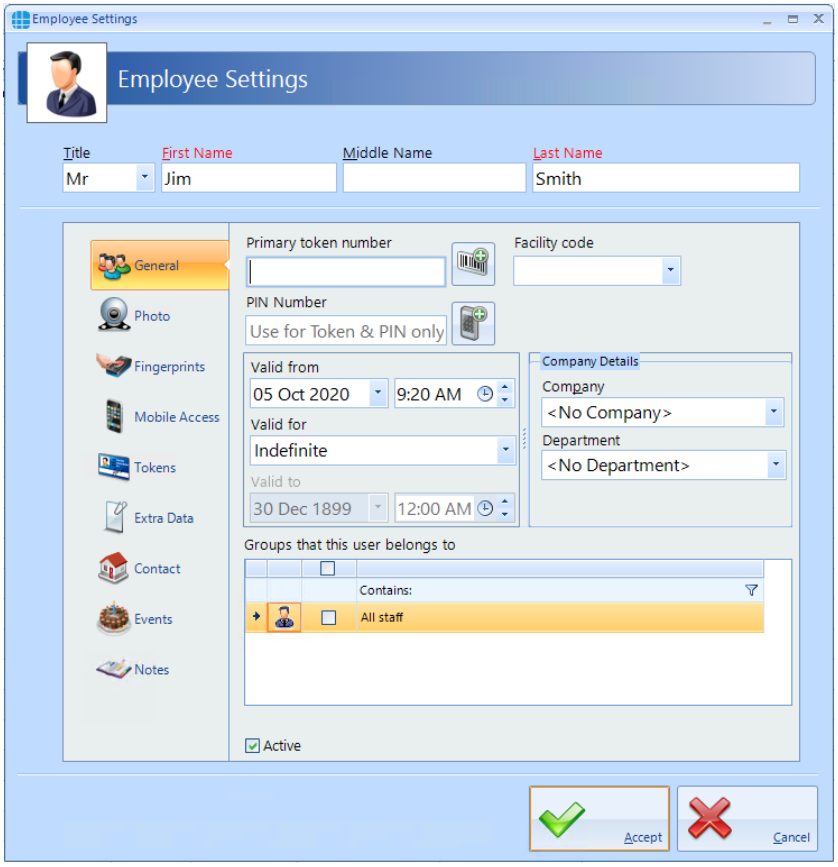
NOTE: it is not possible to import vCards for Visitors or Contractors.



Use the **[...]** button against **Select vCard** option to browse to the vCard and click **[Open]**.



Once imported, the Employee Settings screen automatically opens for that user.


Employee Settings
Employee Settings
Title
First Name
Middle Name
Last Name
Mr
Jim
Smith
General
Photo
Fingerprints
Mobile Access
Tokens
Extra Data
Contact
Events
Notes
Primary token number
Facility code
PIN Number
Use for Token & PIN only
Valid from
05 Oct 2020
9:20 AM
Valid for
Indefinite
Valid to
30 Dec 1899
12:00 AM
Company Details
Company
<No Company>
Department
<No Department>
Groups that this user belongs to
Contains:
All staff
Active
Accept
Cancel

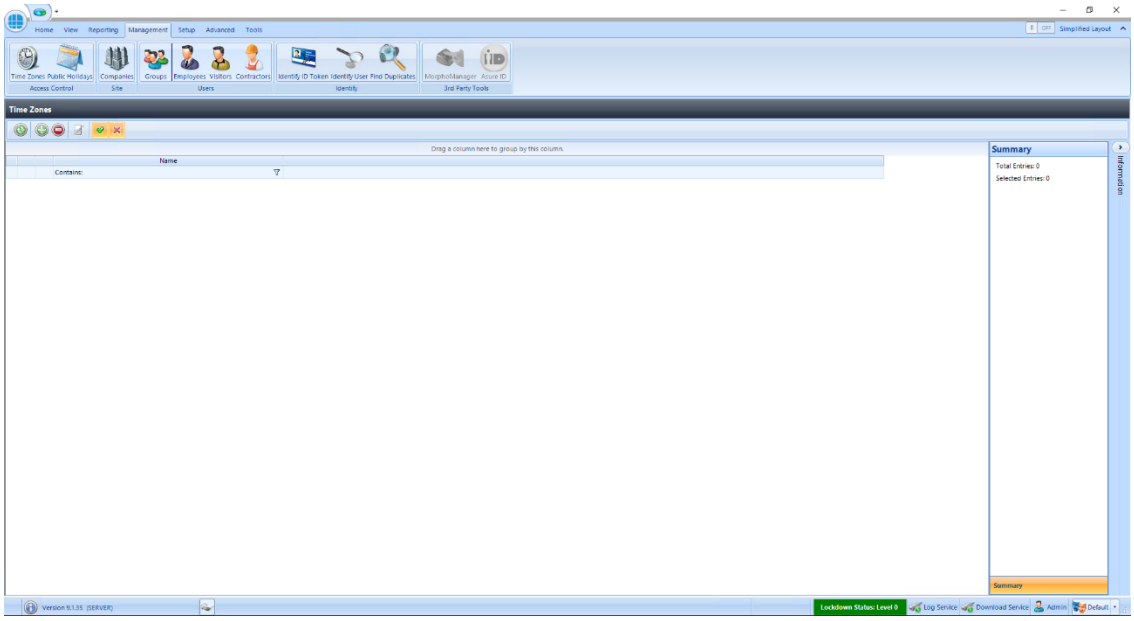
7. Configure Time Zones

Time Zones is a useful facility as it modifies the operation of the system at given times. Time Zones can be used in 2 ways:

If a Time Zone is allocated to a Group, all Users in that Group will have access through the relevant doors only within the Time Zone period

If a Time Zone is allocated to a Door, the door will provide free access within the Time Zone period

To use Time Zones, select the **Management** tab, then click **Time Zones** in the ribbon bar.



This Time Zones window shows that there are no Time Zones in the database. The option buttons are:

 Refresh: Updates the list of Time Zones

 Add: Creates a new Time Zone in the list

 Delete: Removes the selected Time Zone/s from the list

 Edit: edits the selected Time Zone

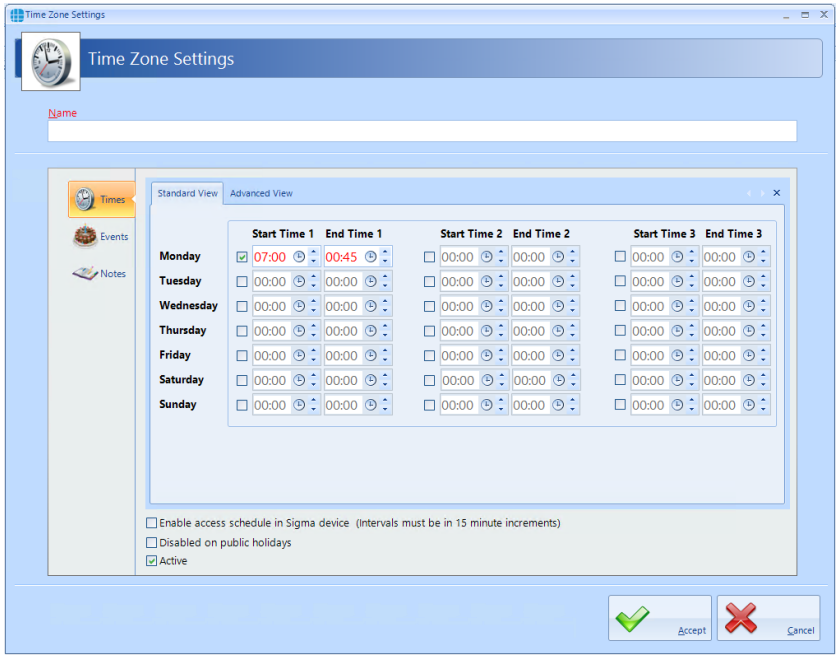
 Show/Hide Active: This button will show or hide Time Zones selected as Active.

 Show/Hide Inactive: This button will show or hide Time Zones not selected as Active.

To create a Time Zone, select the **Add** New button 

7.1. Creating Time Zones

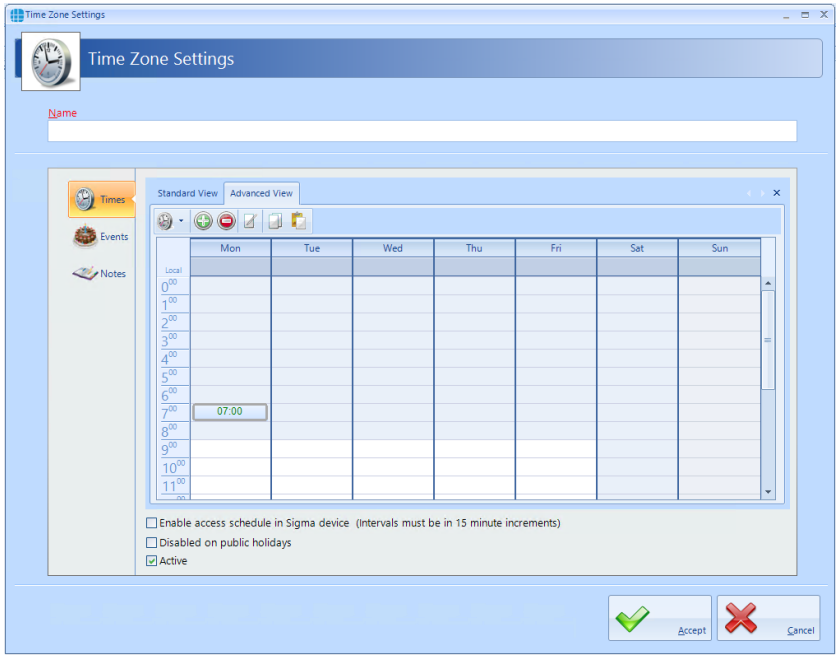
Use the Time Zone Properties screen to configure the Time Zones:



Enter a **Name** for the Time Zone

Each Time Zone can have up to 3 segments, each with its own Start Time and End Time. Unlike previous versions of Identity Access, Time Zones can now be entered to 1 minute resolution.

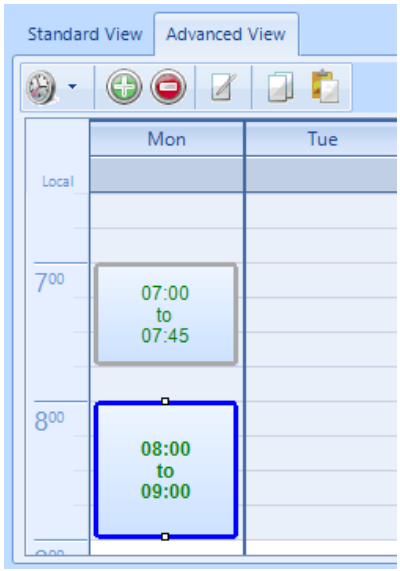
Time Zones can be created graphically rather than entering times by selecting the **[Advanced View]** tab



The following buttons are available in Advanced View:

 The display can be adjusted to show 1 hour, 30 minute, 15 minute, 5 minute or 1 minute resolution

 Adds a time entity. Drag the mouse to select a time period, then click this button. Once created, the display will show the relevant Start Time and End Time Example:



 Deletes the selected time entity

 Edits the selected time entity

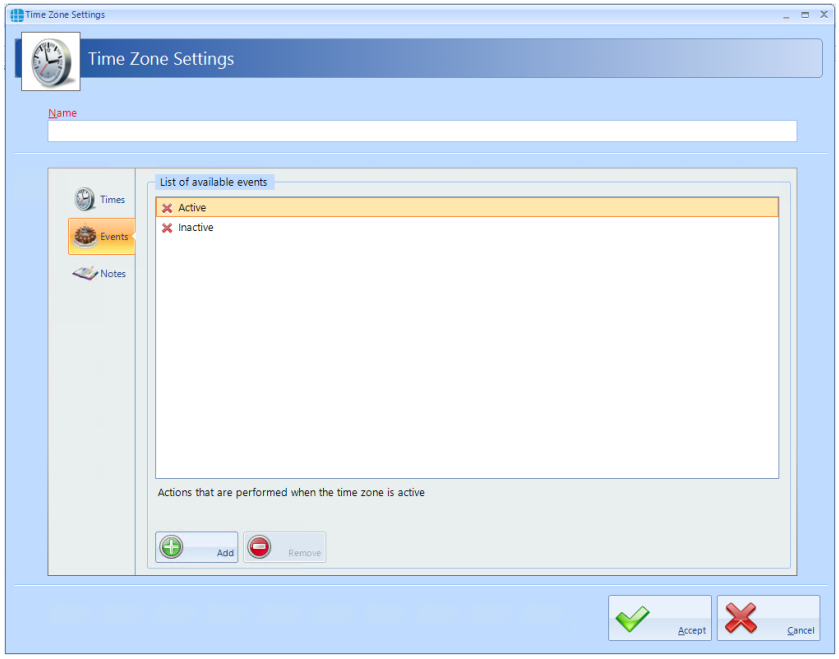
 Copies the selected time entity

 Pastes the selected time entity

In either view, if **Disabled on public holidays** is selected, the Time Zone will not be active during defined public holidays.

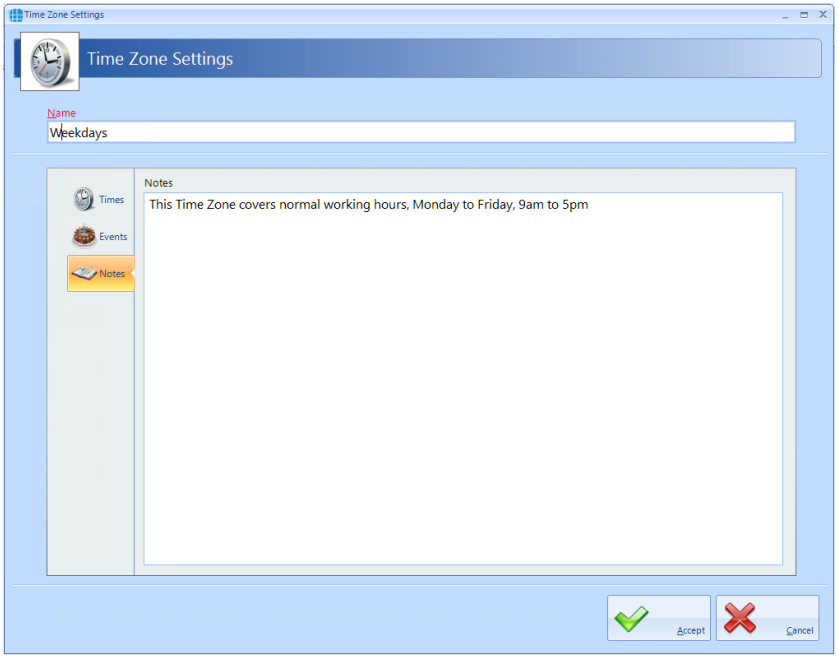
Ensure that **Active** is ticked otherwise it will not be possible to use the Time Zone.

The Events section, accessed from the side bar, will indicate whether any Events have been configured for the selected time zone



In this example, no Events have been created for the selected time zone. Clicking the **[Add]** button will allow Events to be created, although this is more easily done via the **Events** button in the **Advanced** tab, where all Events and related Actions can be viewed.

The **Notes** section, accessed from the side bar, provides a text field which could provide information help a Service Engineer during their first visit to understand the function of the Time Zone.

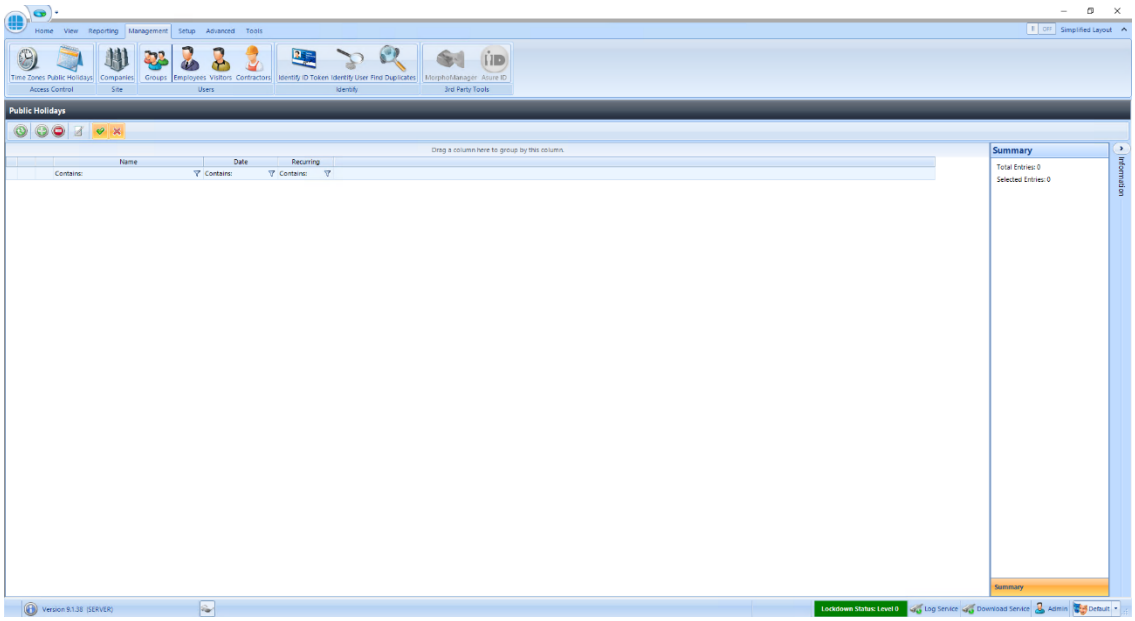


NOTE: Remember to associate Time Zones with the relevant Users / Doors, otherwise they will not be operational.

The i-Net controller can support up to 63 Time Zones when fitted with the latest firmware. i-Nets fitted with firmware version 98.33.21.9 or older can only support 16 Time Zones.

8. Public Holidays

To configure a Public Holiday, select the **Management** tab, then select **Public Holiday** in the ribbon bar



This Public Holidays window shows that there are no Public Holidays in the database. The option buttons are:

 Refresh: Updates the list of Public Holidays

 Add: Creates a new Public Holiday in the list

 Delete: Removes the selected Public Holiday/s from the list

 Edit: edits the selected Public Holiday

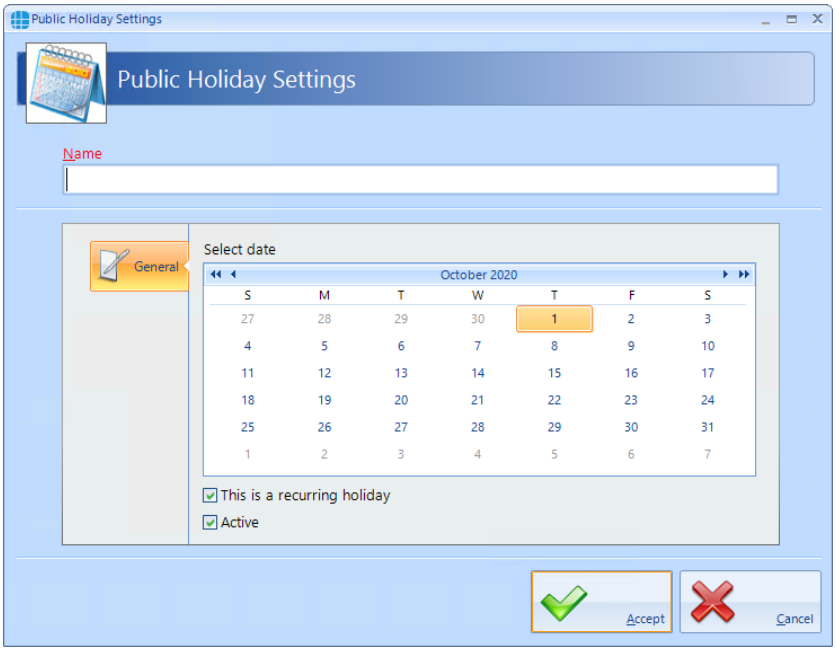
 Show/Hide Active: This button will show or hide Public Holidays selected as Active.

 Show/Hide Inactive: This button will show or hide Operators who are not Active.

To create a new Public Holiday, click the **Add** New button 

8.1. Creating Public Holidays

To configure a Public Holiday:

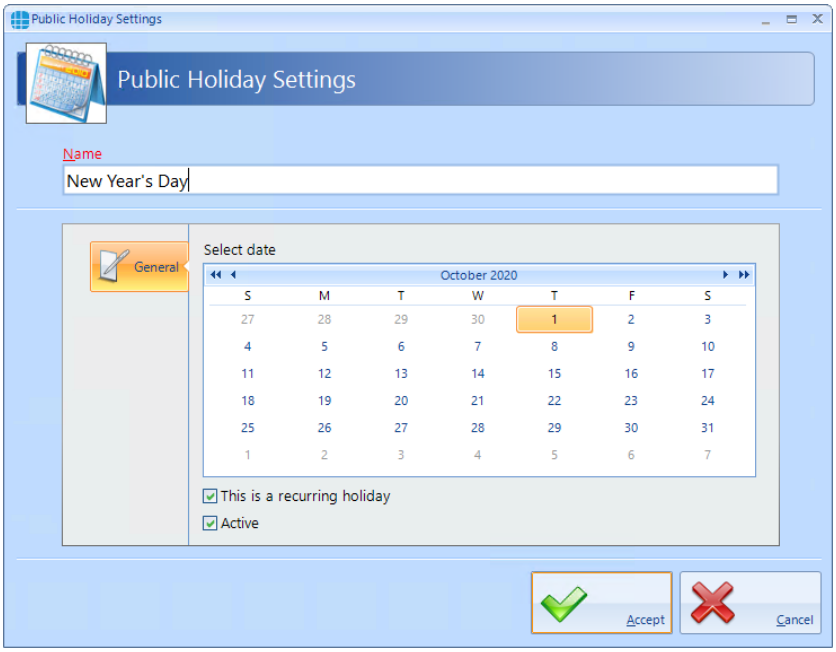


Enter a **Name** for the Public Holiday

Select date of the Public Holiday from the calendar

Select **This is a recurring holiday** if appropriate (e.g. New Year's Day)

Ensure that **Active** is ticked to use the Public Holiday date.

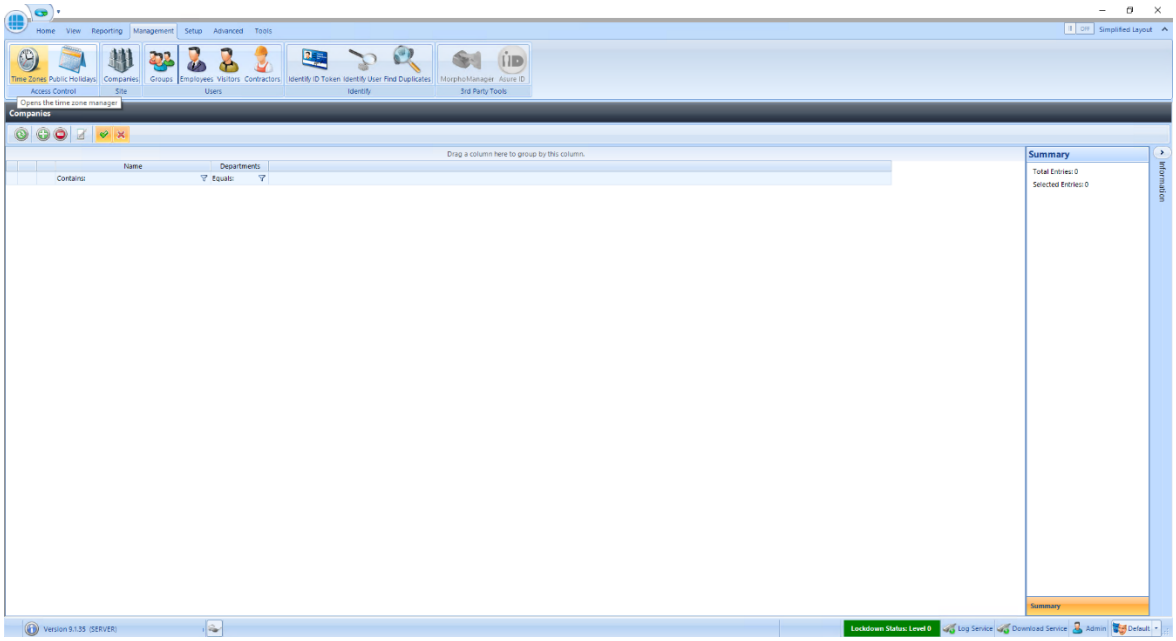


Click **[Accept]** when done.

9. Companies and Departments

Companies and Departments can be a useful tool when running reports to filter out unwanted data. It would be possible, for example, to run a report only on users in the Finance department.

To configure Companies and Departments, select **Companies** from the **Management** tab:



 Refresh: Updates the list of Companies / Departments

 Add: Creates a new Company / Department in the list

 Delete: Removes the selected Company / Department/s from the list

 Edit: Edits the selected Company / Department

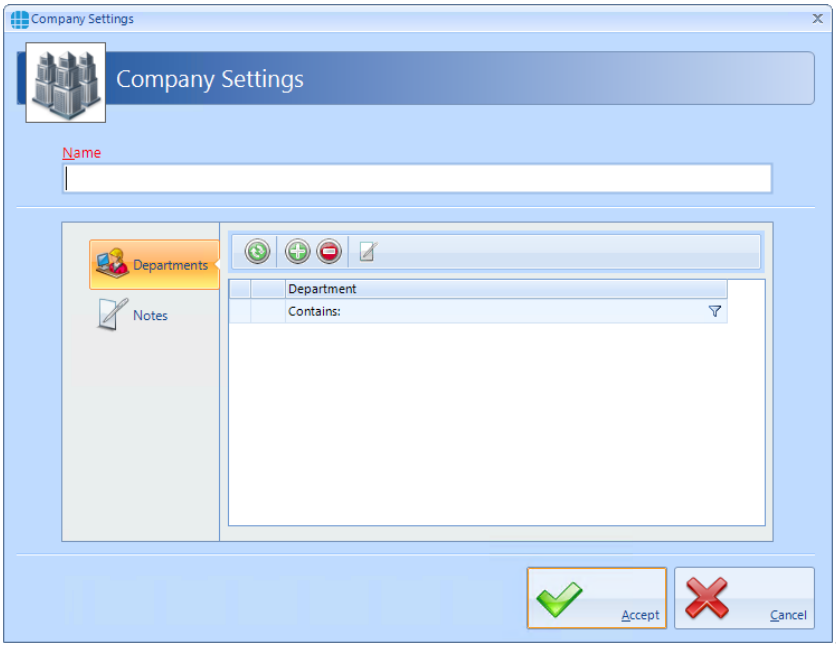
 Show/Hide Active: This button will show or hide Companies / Departments selected as Active.

 Show/Hide Inactive: This button will show or hide Companies / Departments not selected as Active.

NOTE: When allocating a User to a Company / Department, simply choose the relevant option from the pull-down lists

9.1. Creating Companies and Departments

Select the Add button  to display the Company Properties screen below:



 Refresh: Updates the list of Departments

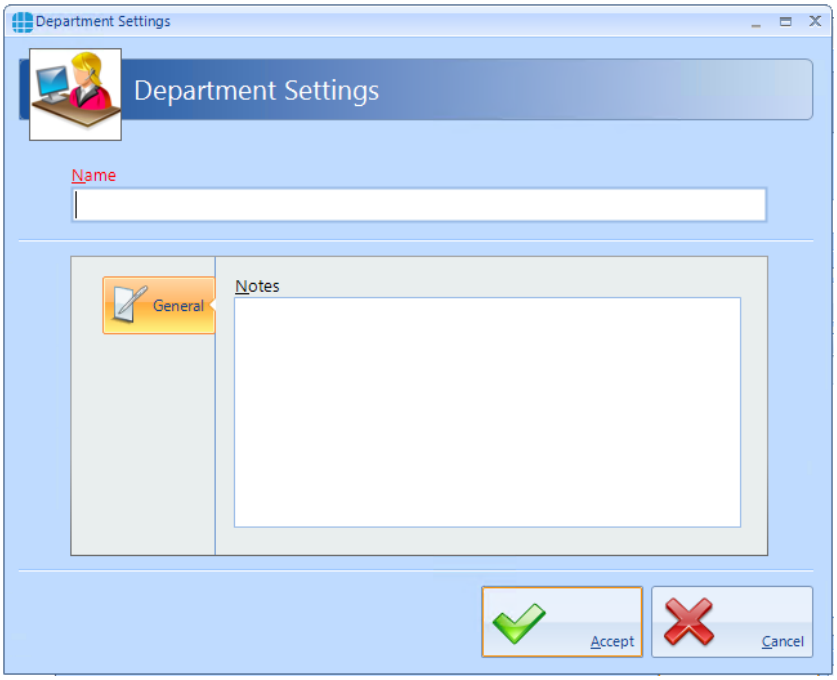
 Add: Creates a new Department in the list

 Delete: Removes the selected Department/s from the list

 Edit: Edits the selected Department

Name: Add a name for the new Company

Click the Add button  to create a Department for the Company



Name: Add a name for the new Department

Notes: Add any notes which could make the configuration easier to understand in the future.

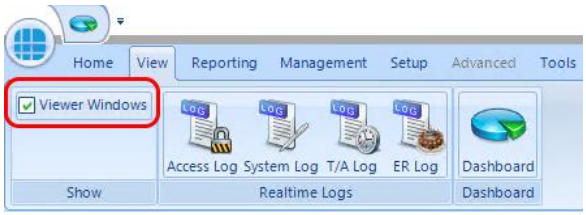
NOTE: A Company can support multiple Departments.

10. Event Viewers and Reports

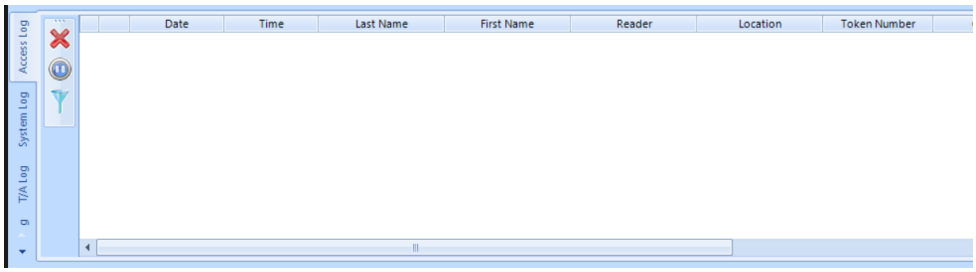
The Event Viewer in Identity Access software is a powerful tool for analysing system activity.

10.1. Event Viewers

Identity Access provides a live view of events, useful for trouble-shooting or tracking users through the system. To view live events, ensure that the option **Viewer Windows** is selected in the **View** tab.



When selected, the viewer window will be visible in the lower half of the screen:



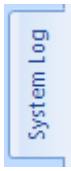

Clear Window: Clears all events in the Viewer Window


Pause/Run: Pausing the Viewer Window will temporarily suspend events from being displayed.

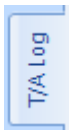

Enable filters to selectively display required information. This can be useful to display the movement of a single user through the system

The information to be displayed is controlled by the 3 tabs below the Viewer Window:

Displays events from the Access Log.



Displays events from the System Log.



Displays events from the Time & Attendance Log

Displays Events and Actions from each controller

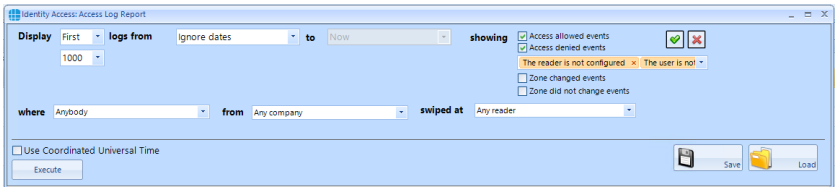
NOTE: The size of the viewer window can be adjusted simply by dragging the top of the window up or down.

10.2. Access Control Reporting

An Access Control report is a record of when people have used their token at a reader, providing an audit trail of when someone entered or exited areas of the premises.

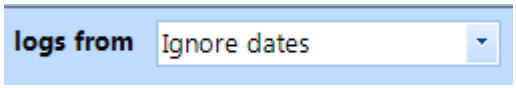
Within Identity Access there are multiple ways to run Access Control reports. It is possible to run reports based on specific date / times, specific readers, or specific users. The Access Report menu can be accessed by selecting **Reporting** and **Access Log** in the **Access** group.

This then runs the Identity Access: Access Log Report form as shown below:

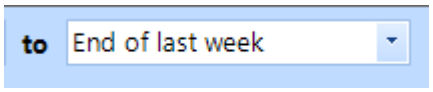


The options on generating the report are as follows:

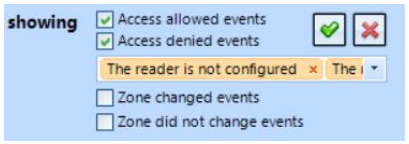
- defines whether the report contains All events or the First or Last 100/500/1000/5000 events in the log.



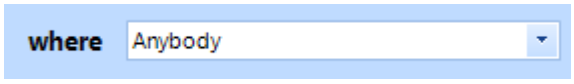
– defines the date that the report starts (Example ignore dates, start of last month or 1st January 2016)



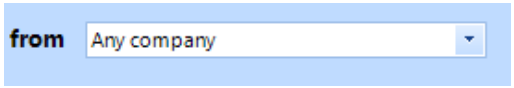
- defines the date that the report ends (Example today or end of last month)



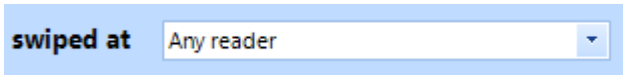
– defines which events are to be reported on, Access Allowed and/or Access Denied and any combination of events from the drop down list . The Tick selects all events in the dropdown list and the Cross deselects all events in the dropdown list. When AntiPassBack is enabled for a door, the system will also log changes to zone (e.g. "Moved to Inside" or "Moved to Outside"). These events can be included in the report if required.



- defines which user/s to report on

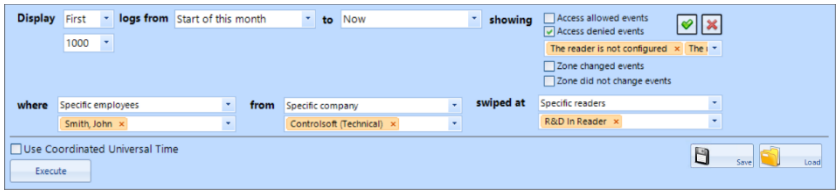


- defines which Company and Department to report on



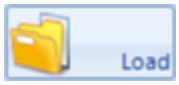
- defines which reader/s to report on.

As an example, to generate a report to see if John Smith tried to get into R&D this month, the configuration would look like:



Once configured, click the **[Execute]** button to generate the report.

saves the current query for later use



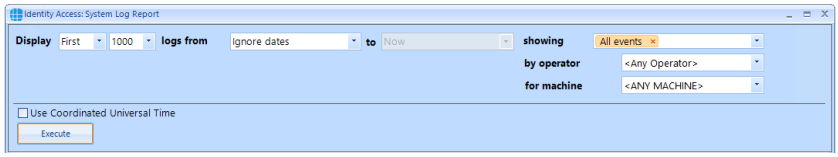
loads a saved query

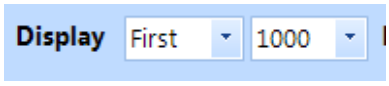
To run a report on a specific person it is also possible to go to **Management** and **Employee** / **Visitor** / **Contractor** (depending on who you wish to run your report on). Highlight the user by left clicking their entry and click the  icon. This will automatically generate a report for this specific person. To run a report on several people it is possible to hold down the [Ctrl] key and highlight multiple entries, then click the  icon.

10.3. System Log Reporting

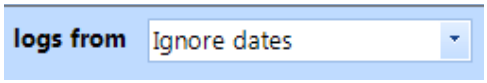
The System Log report is a record of all Identity Access system events, such as when people have logged on / off the software, when doors have been forced open or when database entries have been modified. The System Log Report menu can be accessed by selecting **Reporting** and **System Log.**

The way System Log reports are configured is similar to the Access log Reports, but with fewer options:

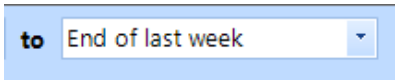




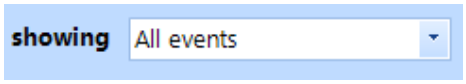
- defines whether the report contains All events or the First or Last 100/500/1000/5000 events in the log.



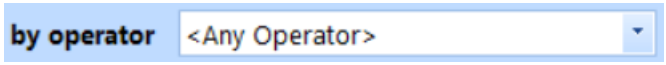
– defines the date that the report starts (Example ignore dates, start of last month or 1st January 2016)



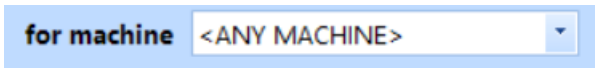
- defines the date that the report ends (Example today or end of last month)



– defines which events are to be reported on, such as startup & shutdowns, which Operators have logged on.



- defines which Operator to report on



- defines which Client machine to report on

Once configured, click the **[Execute]** button to generate the report.

10.4. Fire Rollcall Report

The Fire Rollcall is a report that indicates who is currently inside the building. For the Fire Rollcall to be available there must be dedicated IN and OUT readers that everyone uses when they enter and exit the building. The Fire Rollcall report can be accessed by selecting **Reporting** and **Fire Rollcall.**

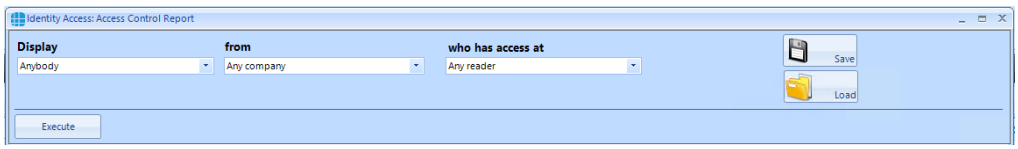
When generating a Fire Rollcall report, no configuration is required, simply click the Fire Rollcall button 

NOTE: The Fire Rollcall report is NOT available in Identity Access unless an Identity Access Professional or Enterprise license is applied.

10.5. Access Control Status Report

The Access Control Status report shows which readers are accessible to one or more users. The report is generated by clicking **Access Control** in the **Status** area of the reporting ribbon bar

Options when running the report are as follows:

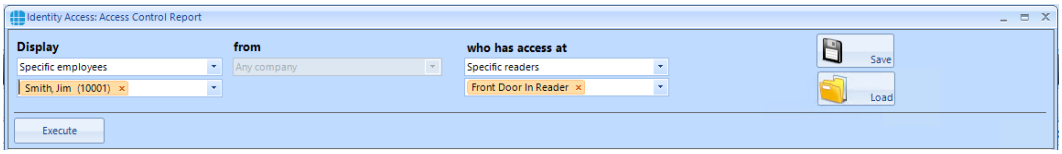


Display - selects specific users to report on

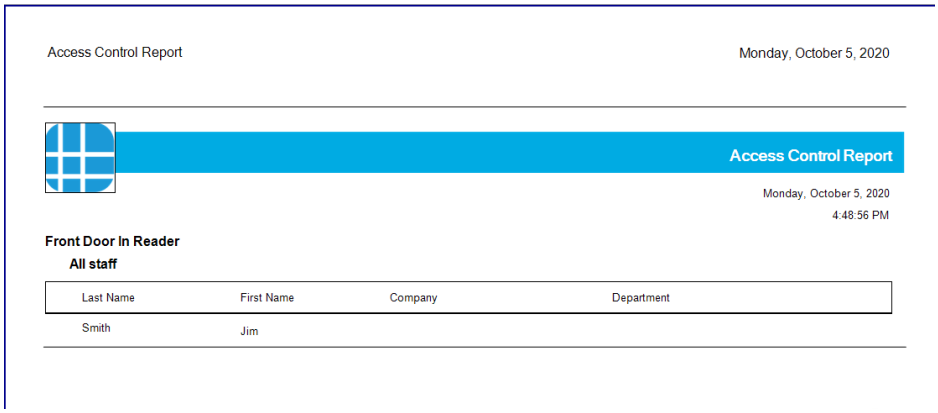
from - selects specific Companies and Departments to report on

who has access at - selects the readers to report on

EXAMPLE: to report whether a specific user has access through a particular reader, the report configuration would look as follows:



Clicking **[Execute]** would then generate the following report:



Access Control Report

Monday, October 5, 2020

Access Control Report

Monday, October 5, 2020
4:48:56 PM

Front Door In Reader
All staff

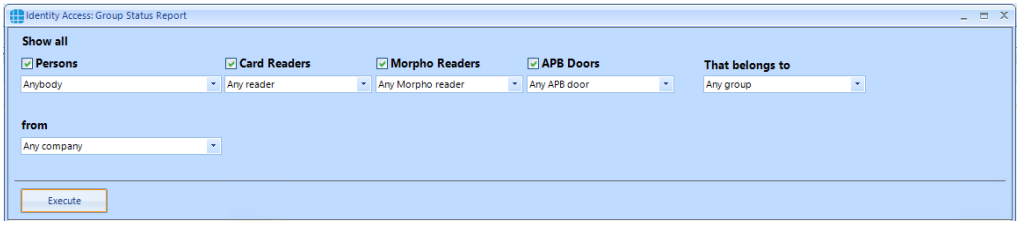
Last Name	First Name	Company	Department
Smith	Jim		

This report shows that the reader called "Front Door In Reader" is accessible by the group "All staff" which includes the user "Jim Smith"

10.6. Groups Status Report

The Groups Status report shows which users, card readers, fingerprint readers and AntiPassBack doors are associated with one or more groups. The report is generated by clicking Groups in the Status area of the reporting ribbon bar:

Options when running the report are as follows



Persons - choose any combination of users to include in the report

Card Readers - choose any combination of card readers to include in the report

Morpho Readers - choose any combination of fingerprint readers to include in the report

APB Doors - choose any combination of AntiPassBack doors to include in the report

That belong to - choose any combination of groups to report on

From - if configured, define the Company and Department to report on

When the above options have been configured, click **[Execute]** to run the report.

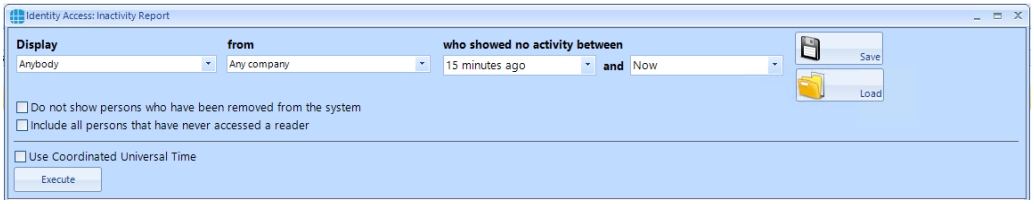
NOTE: This report can be run for a specific Group by selecting the required Group in the Groups screen, then right click and select report from the Option Wheel

10.7. Inactivity Report

The Inactivity report is used to identify users who are no longer using the system, to allow an operator to effectively manage the user database.

To run an Inactivity Report, select the **Reporting** tab.

Now select the **Inactivity** button to run the report



Display - selects specific users to report on

from - selects specific Companies and Departments to report on

who showed no activity between - selects the time range to report on

Do not show persons who have been removed from the system will exclude any users who have already been deleted.

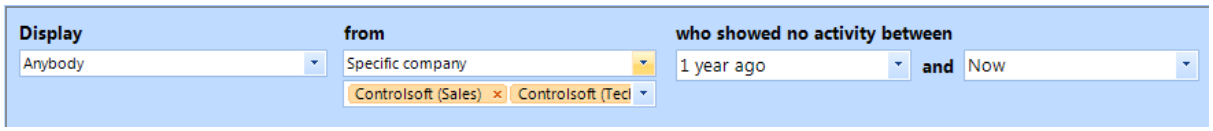
Include all persons that have never accessed a reader will include users on the system who have never used their token.

Use Coordinated Universal Time can be selected where controllers are configured with different International UTC Zones to ensure that events in the report are displayed chronologically

saves the current query for later use

loads a saved query

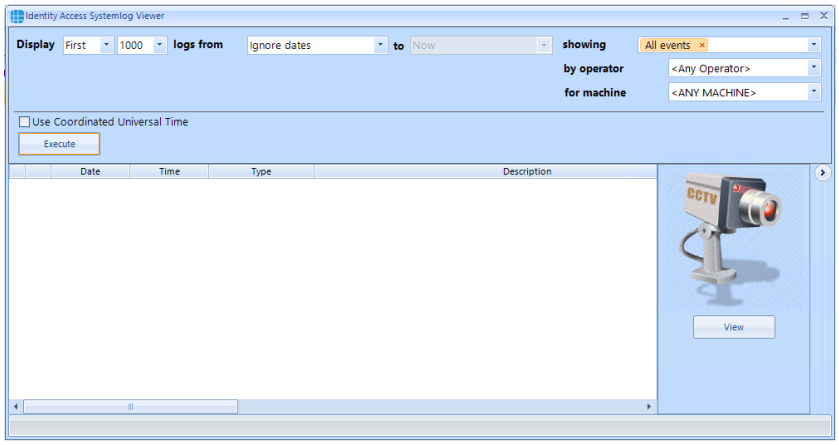
EXAMPLE: to report inactivity on anyone in Controlsoft Sales or Technical within the past year, the report configuration would look as follows:



10.8. System Log

To view events in the System Log, select the **Reporting** menu

Now click the **System Log** button to start the viewer.



Display - defines whether the report contains All events or the First or Last 100/500/1000/5000 events in the log

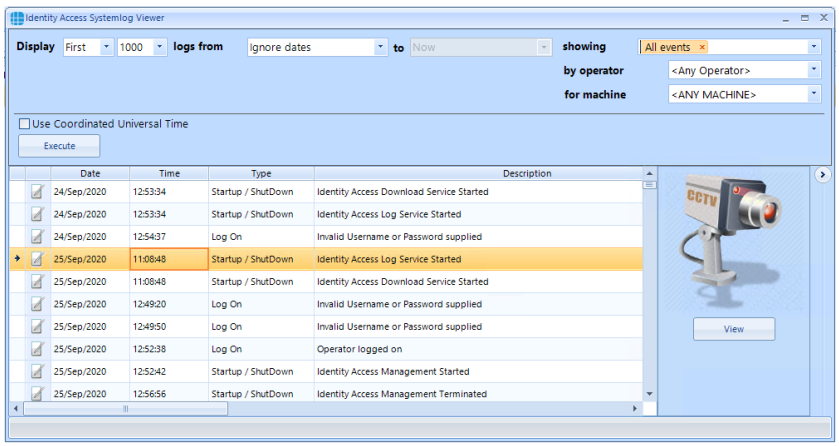
logs from - defines the date that the report starts (Example ignore dates, start of last month or 1st January 2020)

showing - which events are to be reported on, any combination of events from the drop down list.

by operator - defines which Operator to report on

for machine - defines which Client machine to report on

When the report is configured, simply click the **[Execute]** button



If an entry in the System Log contains an image (for example a snapshot generated as an action from an event), the image can be viewed by clicking the **[View]** button