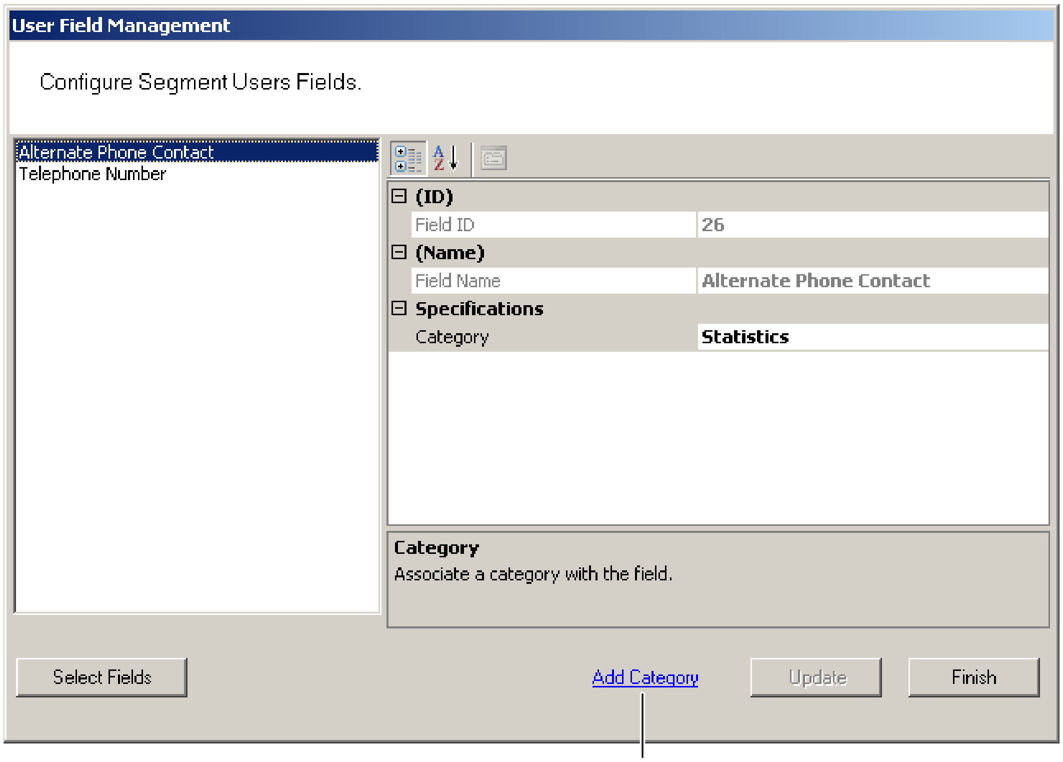
## Adding a New User Fields Category

1 In the User Field Management of Segment dialog box, click the Add Category Link at the bottom of the dialog box.

Figure 71 Add Category



User Field Management

Configure Segment Users Fields.

Alternate Phone Contact
Telephone Number

⊟ (ID)

| | |
|---|---|
| Field ID | 26 |

⊟ (Name)

| | |
|---|---|
| Field Name | Alternate Phone Contact |

⊟ Specifications

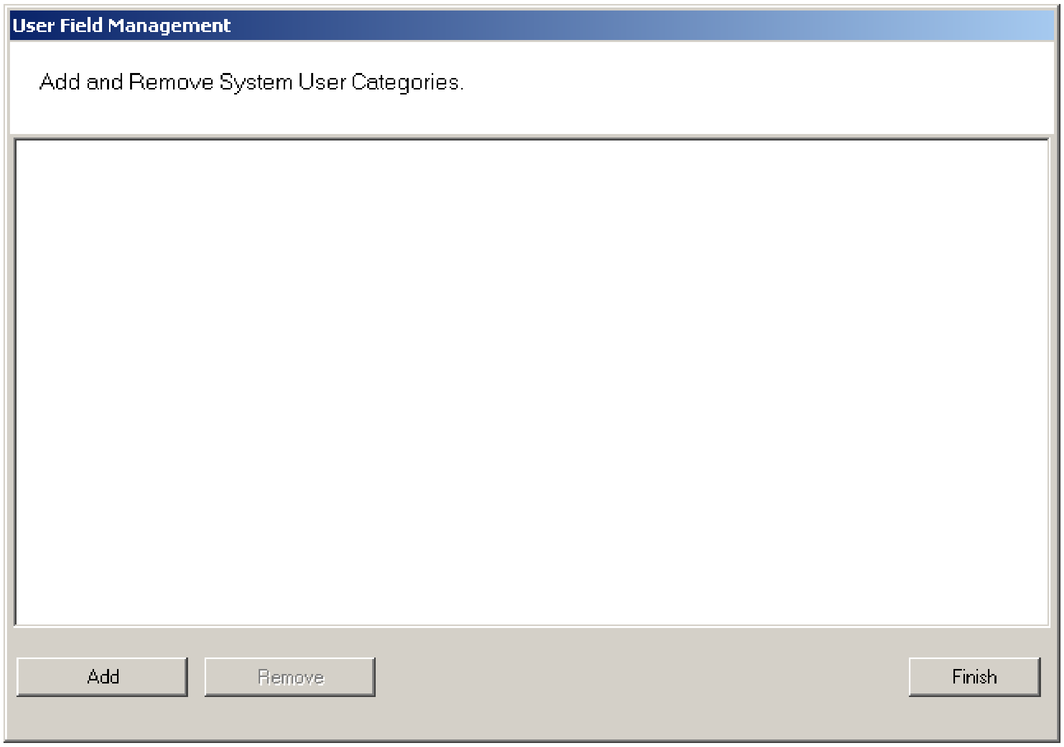
| | |
|---|---|
| Category | Statistics |

**Category**
Associate a category with the field.

Add Category

2 The Add and Remove System User Categories window opens.

Figure 72 Adding and Remove System User Categories



User Field Management

Add and Remove System User Categories.

3 Click the Add button. “Category 1” appears in the text box.

4 Double-click on “Category 1” to rename it.

5 Click Finish. In the Configure Segment Users Fields dialog box, the new category is now available for selection from the Category drop-down list. Now you can select this category when defining a new User Field.

### Removing User Fields and Categories

You can also remove added User Fields and Categories from the system. The system will not allow you to do this, however, if the field or category is in use. Before you remove the field or category, ensure there are no records assigned to them, then perform the following steps.

#### *To remove User Fields from the system*

1 In the User Fields Management dialog box, click the Select Fields button at the bottom of the dialog box.

2 From the User Fields in Facility list on the left, select the fields you wish to remove and click Remove>>. The field is moved to the User Fields list on the right, and remains inactive unless you add it back to the list.

3 Click Finish. The field is no longer available in the User Fields list.

#### *To remove added Categories from the system*

1 In the User Field Management window, select Add Category.

2 The Add and Remove System User Category window opens.

3 Select the category you wish to remove, and click Remove. Click Finish when you are done.

## User Groups

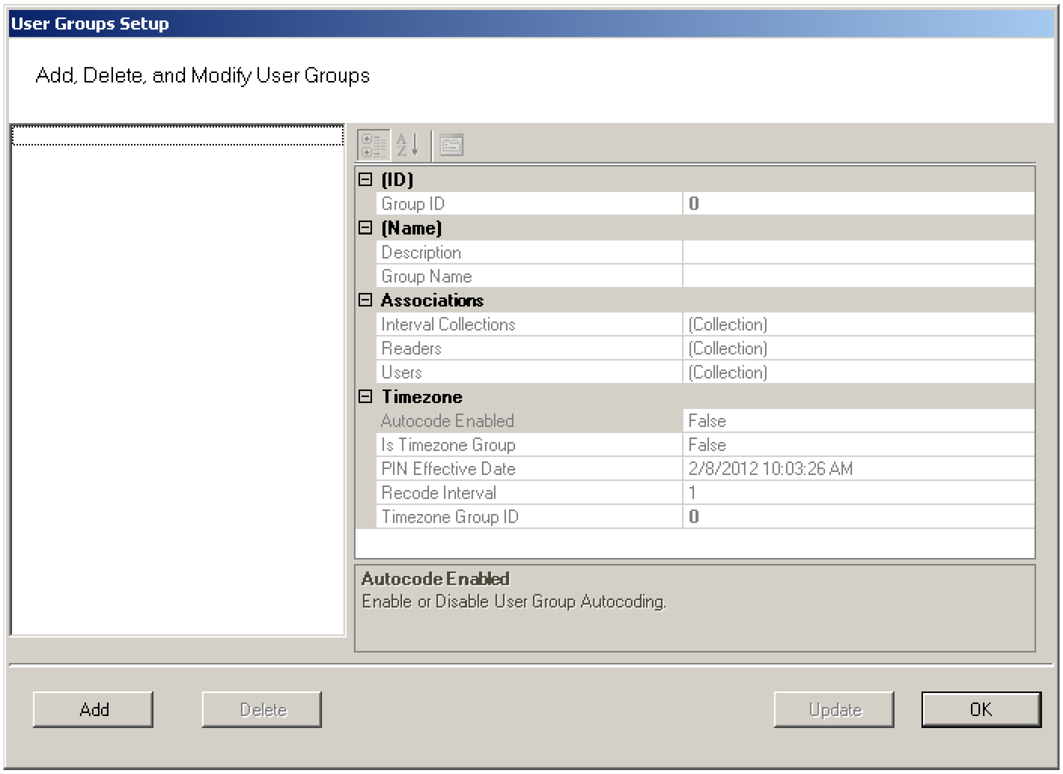
User Groups are a convenient way to define properties that will affect certain groups of individuals in your system. For example, if your Administrative personnel have different hours or entry parameters, you can create an Administrative group, make that group a Timezone Group and assign administrative personnel to that group.

You can define any number of User Groups, such as Administrative, General, Laboratories, Dormitories, Night Shift, Contractors, and so on.

### Adding User Groups

1 In the Users Tab, Associations category, click the User Groups field. Select the ellipsis button at the far right of the field. The User Group Setup dialog box opens.

Figure 73 User Groups Setup


User Groups Setup

Add, Delete, and Modify User Groups

| | |
|---|---|
| ⊟ (ID) | |
| Group ID | 0 |
| ⊟ (Name) | |
| Description | |
| Group Name | |
| ⊟ Associations | |
| Interval Collections | (Collection) |
| Readers | (Collection) |
| Users | (Collection) |
| ⊟ Timezone | |
| Autocode Enabled | False |
| Is Timezone Group | False |
| PIN Effective Date | 2/8/2012 10:03:26 AM |
| Recode Interval | 1 |
| Timezone Group ID | 0 |

**Autocode Enabled**
Enable or Disable User Group Autocoding.

2 The groups you create display on the left. The group's ID, Name, Associations and Timezone appear on the right.

3 Select Add. A new Group (Group1) is created and displays on the left.

4 In the Group Name box, replace the name Group1 with a name for the new group (for example, Administrative).

5 Select OK.

**Note** Once you have added users to the system via the Users Tab, you can assign them to these User Groups.

### Removing User Groups

In the User Group Setup dialog box, select the group you wish to remove and select the Delete button. The group is immediately removed from the list, along with its associations.

### Associating Users with User Groups

1 In the Segment Tab, Associations category, click the User Groups field.

2 Select the ellipsis button at the far right of the field.

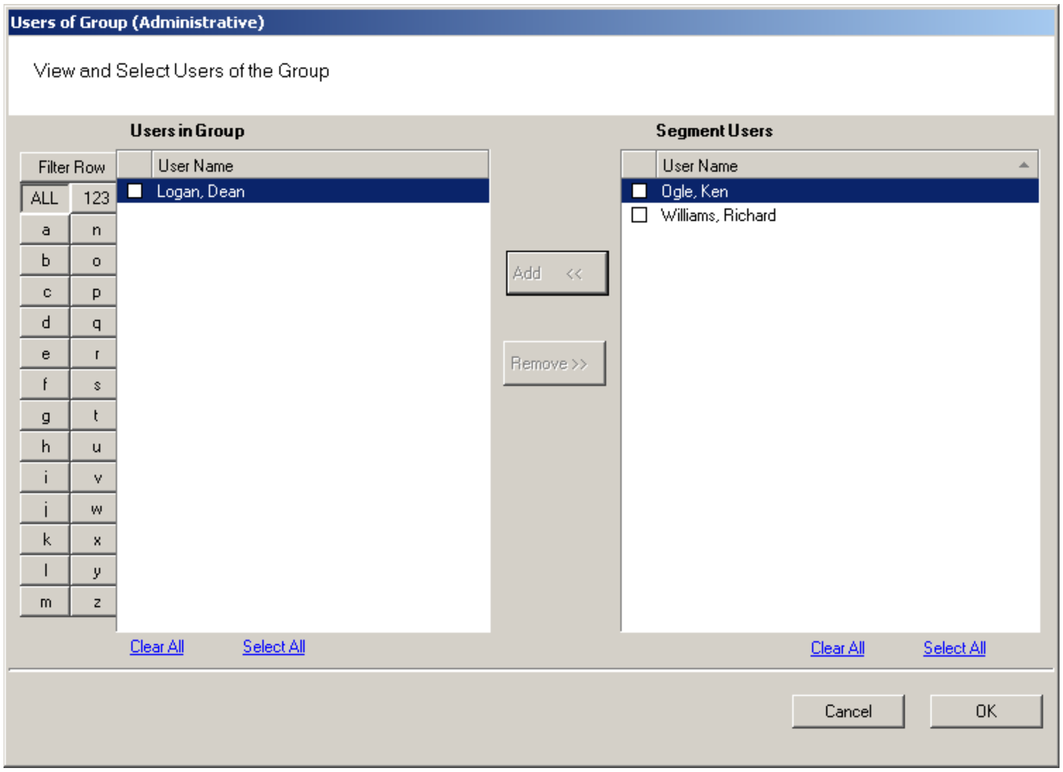
3 In the User Groups Setup dialog box, select the group you wish to associate

with users.

4 In the Associations category, click in the Users field and select the ellipsis button. The Users of Group dialog box opens.

5 All users in the segment not already assigned to the group are displayed under Segment Users list on the right.

Figure 74 Users of Group



Users of Group (Administrative)

View and Select Users of the Group

| Users in Group |
|---|
| User Name |
| □ Logan, Dean |

| Segment Users |
|---|
| User Name |
| □ Ogle, Ken |
| □ Williams, Richard |

**Note** Users will not appear in the Segment Users list until they have been added to the system. If you have a large number of users, you can use the Alphabetic sorter buttons on the left of the list to more quickly find a specific user.

6 Select the checkbox next to the users you wish to associate with the User Group.

7 Select <<Add. The User names will be removed from the Segment Users list on the right and display under Users in Group list on the left.

8 Select OK to close the Users of Group dialog box.

### Removing Users from User Group

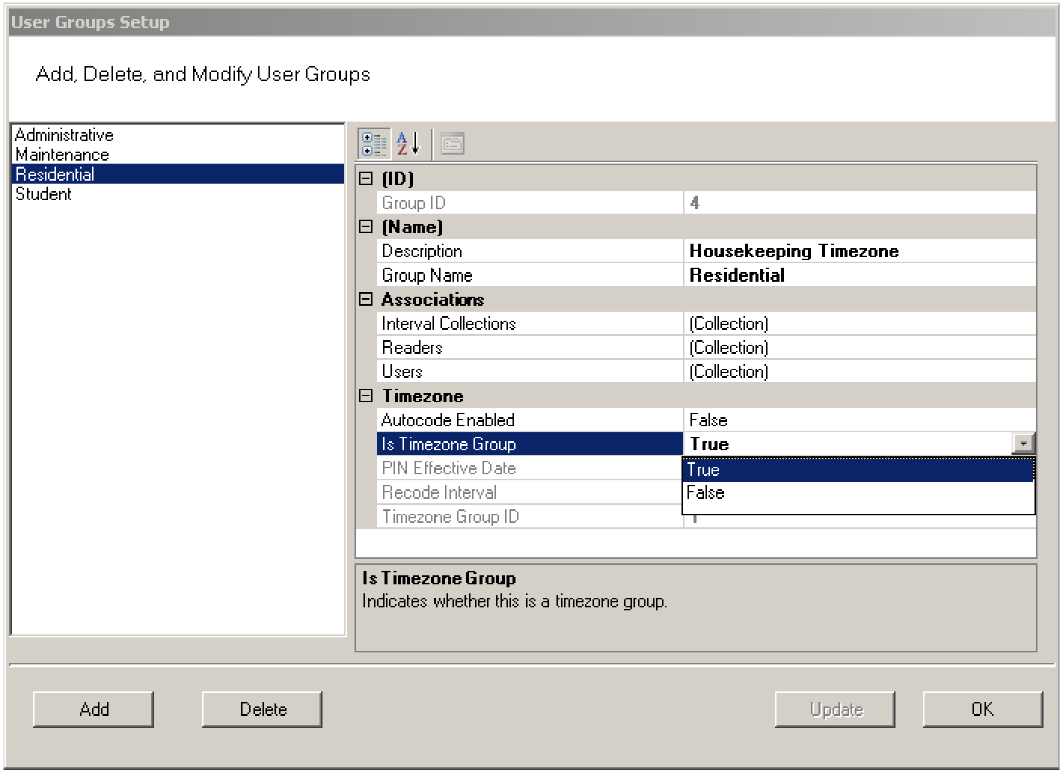
1. In the User Groups Setup dialog box, select the group in which the user currently resides.
2. In the Associations category, click on the Users field, and select the ellipsis button. The Users of Group dialog box opens.
3. From the Users in Group list on the left, select the checkbox next to the user you wish to remove from the group.
4. Select Remove. The user name will be removed from Users in Group list on the left and moved back to the Segment Users list on the right. Select OK to close the Users of Group dialog box.

### Timezone User Groups

You can create up to 512 Timezone User Groups to further define access levels for the Master Timezone. These can restrict access of a certain group of employees to a specific time period. Perform the following steps to create a timezone user group.

1. In the Segment Tab, select the Segment to which you wish to add a new Timezone User Group.
2. In the Associations Category, select User Groups and click the ellipsis button at the far right of the field. The User Groups Setup dialog box opens.

Figure 75 Creating a Timezone User Group



User Groups Setup

Add, Delete, and Modify User Groups

Administrative
Maintenance
Residential
Student

| | |
|---|---|
| **(ID)** | |
| Group ID | 4 |
| **(Name)** | |
| Description | **Housekeeping Timezone** |
| Group Name | **Residential** |
| **Associations** | |
| Interval Collections | (Collection) |
| Readers | (Collection) |
| Users | (Collection) |
| **Timezone** | |
| Autocode Enabled | False |
| Is Timezone Group | **True** |
| PIN Effective Date | |
| Recode Interval | |
| Timezone Group ID | 1 |

**Is Timezone Group**
Indicates whether this is a timezone group.

3 Select Add. Group1 is created.

4 In the Name Category, Description, enter a description for the group, for example: Housekeeping Timezone.

5 In the Group Name, replace Group1 with the name of your new user group, for example, Residential.

6 Under Timezone, change the Is Timezone Group default setting from False to True. Select Update to continue creating groups.

7 Select OK to save the new Timezone group.

Once you have created a Timezone group, you will need to set up access times to apply to that group. For more information about Timezones and Timezone User Groups, see “Configuring Timezones” on page 137.

# Credential Settings

Keypad credentials, magnetic card settings, and proximity card settings are all set in this category. Detailed steps are presented in the following sections.

## Keypad Credential Length

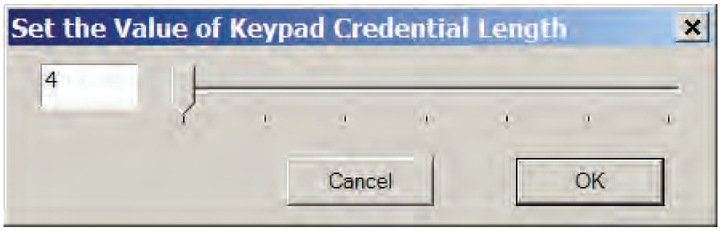
If your access system will have or currently has cards encoded with keypad credentials, you may set the number of digits required here.

**Note** Keypad credential length must be set before you add users to the system.

Perform the following steps to set the Keypad Credential Length.

1. In the Segment Tab, under the Credential Settings category, click in the Keypad Credential Length field.
2. Click the ellipsis button at the far right of the field. The Set value of Keypad Credential Length dialog box opens.

Figure 76 Setting the Credential Length



Set the Value of Keypad Credential Length

4

3. Enter the length or slide the bar to select the position of the Keypad Credential length you will use on segment cards.
4. Select OK to save your settings and exit the box.

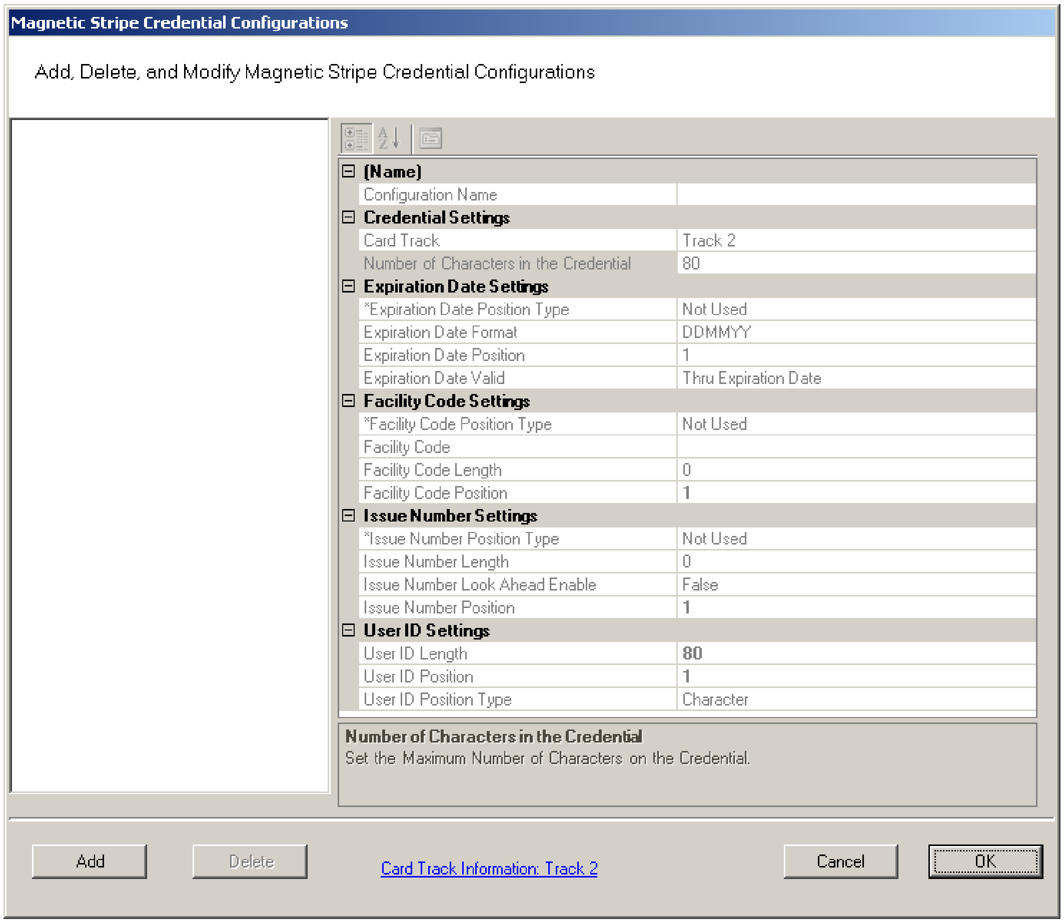
## Magnetic Stripe Credential Configurations

Before Magnetic cards can be used in the system, you must configure AMS to accept the card types and settings. Figure 77 shows the Magnetic Stripe Credential Configurations Window. Default settings will be sufficient for most systems.

Most users will use Track 2 cards and will not need to set up any type of advanced card parameters. Wi-Q AMS default Expiration Date, Segment Code, and Issue Number settings to Not Used, and no other changes need to be made.

Stanley Security Solutions currently stocks and provides Track 2 or Track 3 magnetic cards. These cards conform to ISO standards and can be ordered pre-encoded or blank. The system can be used with either Track 1, Track 2, or 3 cards, however you can only encode 1 type within the same segment.

Figure 77 Magnetic Stripe Credential Configurations



Magnetic Stripe Credential Configurations

Add, Delete, and Modify Magnetic Stripe Credential Configurations

|  |  |
|---|---|
| **(Name)** |  |
| Configuration Name |  |
| **Credential Settings** |  |
| Card Track | Track 2 |
| Number of Characters in the Credential | 80 |
| **Expiration Date Settings** |  |
| *Expiration Date Position Type | Not Used |
| Expiration Date Format | DDMMYY |
| Expiration Date Position | 1 |
| Expiration Date Valid | Thru Expiration Date |
| **Facility Code Settings** |  |
| *Facility Code Position Type | Not Used |
| Facility Code |  |
| Facility Code Length | 0 |
| Facility Code Position | 1 |
| **Issue Number Settings** |  |
| *Issue Number Position Type | Not Used |
| Issue Number Length | 0 |
| Issue Number Look Ahead Enable | False |
| Issue Number Position | 1 |
| **User ID Settings** |  |
| User ID Length | 80 |
| User ID Position | 1 |
| User ID Position Type | Character |

**Number of Characters in the Credential**
Set the Maximum Number of Characters on the Credential.

If you must make changes to the default settings, click Add to create a new Magnetic Stripe card configuration, and give a name to your configuration in the Configuration name field.

## Credential Settings

Wi-Q AMS can be configured to accept coding from existing Track 1(210 BPI), Track 2 (75 BPI) or Track 3 (210 BPI) cards as long as the code does not exceed the maximum number of characters for that track and/or controller. Magnetic cards are configured as Track 2 by default. Perform the following steps to change to change the segment track setting for encoding cards:

1 In the Magnetic Stripe Credential Configurations window, click the Card Track Information link at the bottom of the window.

2 The Define Magnetic Stripe Card Track Information window opens. Specify the desired track from the dropdown menu. Then click Finish.

3 Click OK to exit the Magnetic Stripe Credential Configurations window.

4 In the Segment tab, click Update at the bottom right to update your segment.

### *Card Track Limits*

Wi-Q AMS is flexible and may accept coding from existing Track 2 or Track 3 cards as long as they do not exceed the maximum number of characters for that track and/or controller. These characters include any digits and field separators, however they exclude the starting and ending sentinels. Refer to the Stanley Security Knowledge Base or contact Technical Support for controller hardware track limits.

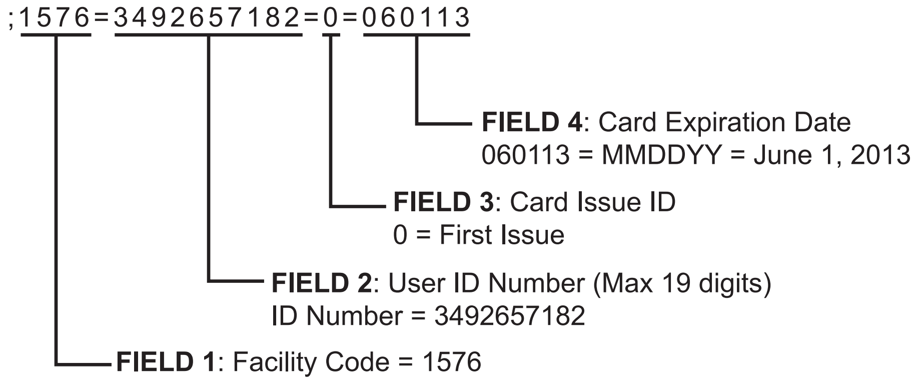
### *Character codes and counts*

The software recognizes data on a magnetic card stripe using ANSI standard codes formatted to either a field separator or character count. Following is a brief description of each type.

**Field Separator —** Field Separator (FS) character, generally represented as an equal sign (=) to separate two independent data fields. A card using this method might have the owner's individual ID encoded at the beginning of the stripe followed by the FS character then the global segment ID. The fields can be in either order, or there can be more than two fields, which could be required for compatibility with pre-existing systems, and any one of them can be set up as User ID, Segment ID, Card Issue ID, or Expiration Date.

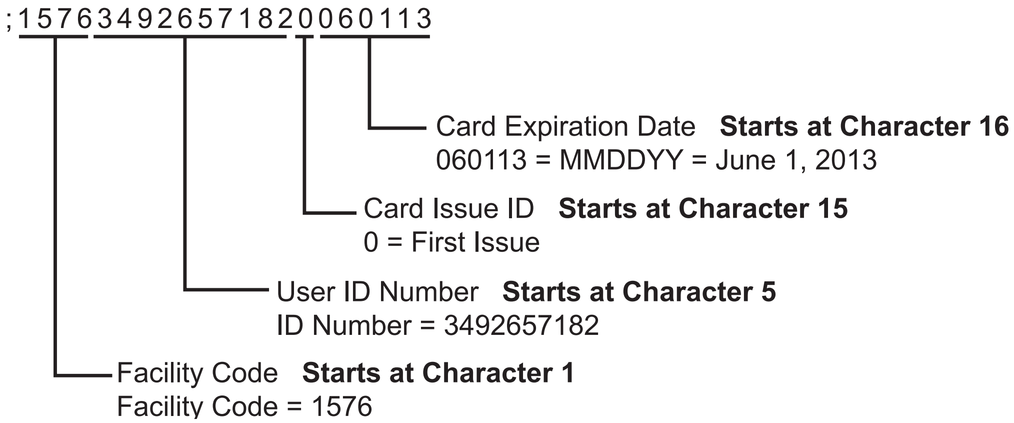
Following is an example of encoded data using field separators on Track 2.

Figure 78 Data Fields


;1576=3492657182=0=060113
**FIELD 4**: Card Expiration Date
060113 = MMDDYY = June 1, 2013
**FIELD 3**: Card Issue ID
0 = First Issue
**FIELD 2**: User ID Number (Max 19 digits)
ID Number = 3492657182
**FIELD 1**: Facility Code = 1576

**Character Count —** You can set up a character count from the beginning of each ID. For example, the Segment ID could start at the beginning of the data stripe, digit count of 1. If the Segment ID has eight digits, the User ID would be set to start at digit count of 9. This method requires all data groups with exception of the last one, to have a fixed number of digits. Following is an example of encoded data using character counts on Track 2.

Figure 79 Character count fields


;1576349265718200060113
Card Expiration Date **Starts at Character 16**
060113 = MMDDYY = June 1, 2013
Card Issue ID **Starts at Character 15**
0 = First Issue
User ID Number **Starts at Character 5**
ID Number = 3492657182
Facility Code **Starts at Character 1**
Facility Code = 1576

**Note** If you are not using the default settings for Magnetic Stripe Credential Configurations, make sure that Expiration Date Position Type, Facility Code Position Type, Issue Number Position Type and User ID Position Type are all set to either must be set to “Field” (Field Separator) or “Character” (Character Count); you cannot mix types.

### Expiration Date Settings

Perform the following steps to define a card expiration date.

1 In the Magnetic Stripe Credential Configurations window, under the Expiration Date Settings category, click in the Expiration Date Position Type field.

2 Select either Character or Field from the drop-down list. The Expiration Date Format, Position and Valid list boxes activate.

3 In the field next to Expiration Date Format, select the date format you need from the drop down list (MMDDYY, etc.).

4 In the field next to Expiration Date Position, enter the value to represent either the field position or the character number where the expiration date appears on the card stripe.

5 In the field next to Expiration Date Valid, select either To or Thru Expiration date.

6 Select OK to save your settings and exit the box.

**Note** If you use the character code format and select the six-digit expiration date format, the value of your next setting (Facility Code Settings) must start with character position 7. If you enter an incorrect value, the system will report an error message. Review the "Character codes and counts" on page 111 if you need clarification.

### Facility Code Settings

Perform the following steps to define a facility code type, position and length.

1 Under the Facility Code Settings category, click in the Facility Code Position Type field.

2 Select either Character or Field from the drop-down list. The Facility Code fields below activate.

3 In the field next to Facility Code, enter your Facility Code number.

4 In the field next to the Facility Code Length, enter the length.

5 In the field next to Facility Code Position, enter the facility code position.

6 Select OK to save your settings and exit the box.

### Issue Number Settings

You can issue a replacement card to a user in lieu of issuing a new User ID. The Card Issue ID consists of one or two digits from 0 through 99. After using the card with an incremented (higher number) Card Issue ID in a reader, that lock will no longer accept cards with the same User ID that have a lower Card Issue ID.

Perform the following steps to define an issue number position.

1 In the Issue Number Settings category, click in the Issue Number Position Type field.

2 Select either Character or Field from the drop-down list. The Issue Number fields below activate.

3 Enter the Issue Number length.

4 Click the Issue Number Look Ahead Enable field, and select true or false from the dropdown menu.

5 Enter the Issue Number position.

6 Select OK to save your settings and exit the box.

### User ID Settings

You can specify the position of the User ID code in the credential number either by character or field position. Perform the following steps to modify the User ID Settings.

1 Enter the User ID Length.

2 In the User ID Position field, enter the position number.

3 In the User ID Position Type field, specify Character or Field.

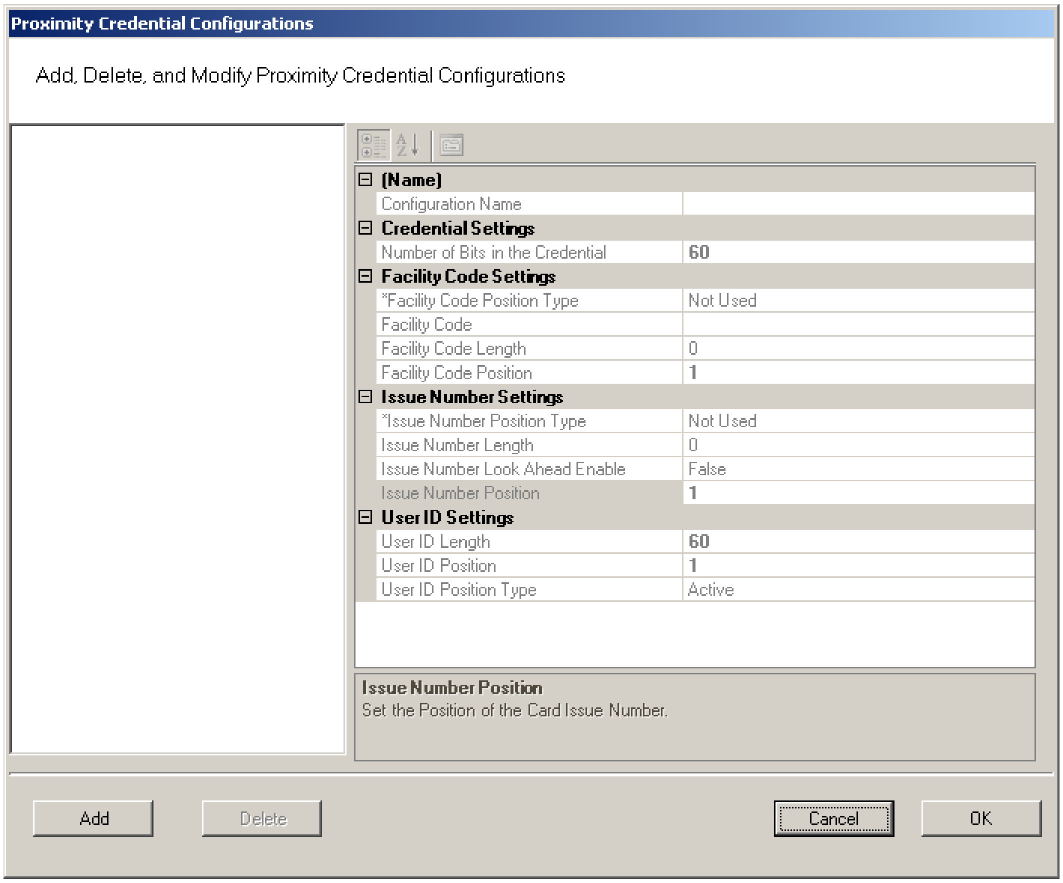
4 Select OK to save your settings and exit the box.

5 Select Finish to save all your settings.

## Proximity Credential Configurations

If you are using proximity cards in your system, you can add card configurations by clicking on the Proximity Credential Configurations field and selecting the ellipsis button at the far right. Figure 80 shows the Proximity Credential Configurations window.

Figure 80 Proximity Credential Configurations



Proximity Credential Configurations

Add, Delete, and Modify Proximity Credential Configurations

| | |
|---|---|
| ⊟ **(Name)** | |
| Configuration Name | |
| ⊟ **Credential Settings** | |
| Number of Bits in the Credential | **60** |
| ⊟ **Facility Code Settings** | |
| *Facility Code Position Type | Not Used |
| Facility Code | |
| Facility Code Length | 0 |
| Facility Code Position | **1** |
| ⊟ **Issue Number Settings** | |
| *Issue Number Position Type | Not Used |
| Issue Number Length | 0 |
| Issue Number Look Ahead Enable | False |
| Issue Number Position | **1** |
| ⊟ **User ID Settings** | |
| User ID Length | **60** |
| User ID Position | **1** |
| User ID Position Type | Active |

**Issue Number Position**
Set the Position of the Card Issue Number.

To add a card configuration, perform the following steps.

1 Click Add. Give your new configuration a name in the Configuration Name field.

2 Under Credential Settings, select Number of Bits in the Credential. Change the number to the right (default 60) to match the number of bits on your card.

3 If your card is configured to include the facility code, change Facility Code Position type to Active. The facility code fields below will activate.

   a Enter your facility code in the Facility Code field.

   b Change the Facility Code Length to match the number of bits in your facility code.

   c Change the Facility Code Position to match your card.

**Note** Issue Number Settings are not configurable for proximity cards. Proceed to User

ID Settings.

4 Under the User ID Settings category, change the User ID Length to the number of bits used for User IDs on your card. Set the User ID Position.

5 When finished, click OK.

## Daylight Saving Settings

You can set Wi-Q AMS to automatically respond to Daylight Saving Time settings. When you select North American as the Daylight Saving Type, the system defaults to standard Daylight Saving Time settings. When you select Europe as the Daylight Saving Type, the system defaults to the settings for Europe.  When you select Southern Hemisphere, the system defaults to the settings for the Southern Hemisphere. Once the settings are selected, the system will adjust to Daylight Saving Time automatically.

To change Daylight Savings Settings, place the cursor in the field next to Daylight Saving Type and select the type you wish to use. The settings below change to the defaults for that setting.

## I/O

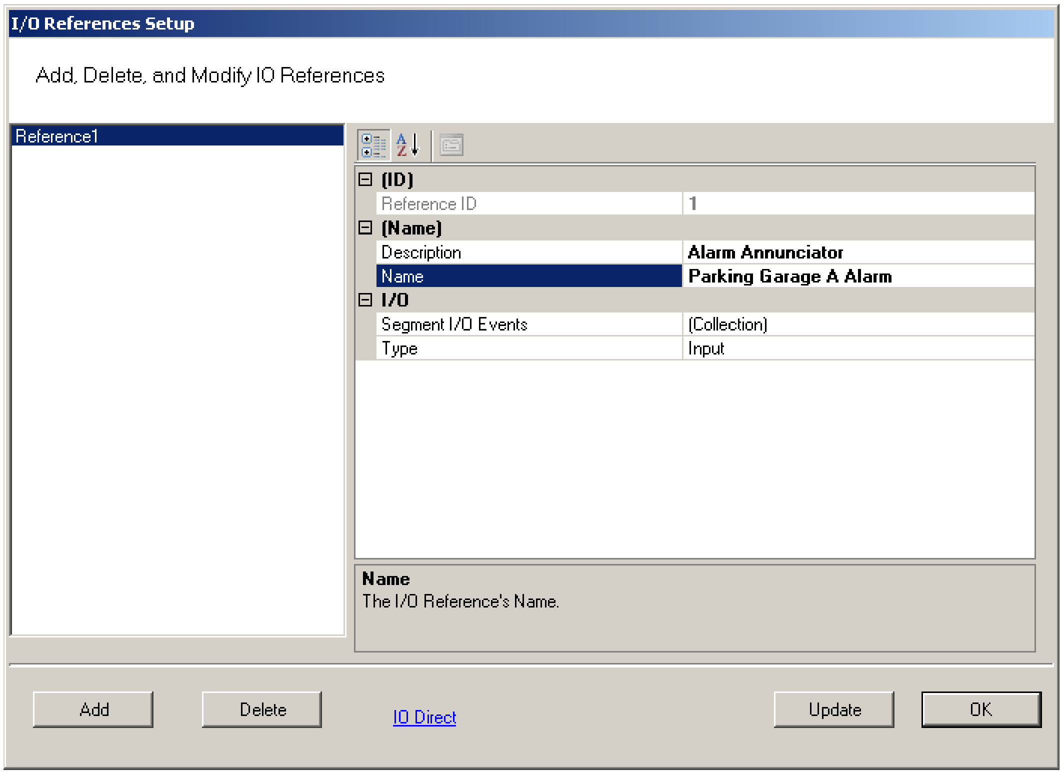
If you are using input/output devices in your system, they are recognized and defined similar to a Controller.

For example, if you are using a WAC to collect transactions from an alarm, you will see it in your Segment Tree as a “Reader” when its associated Portal Gateway is brought online. You can define and modify I/O events for the controller under I/O References.

### Adding and Modifying I/O References

1 In the Segment tab, click the I/O References field, and click the ellipsis button at the far right. The I/O References Setup dialog box opens.

Figure 81 I/O References Setup



Reference1

| | |
|---|---|
| **(ID)** | |
| Reference ID | 1 |
| **(Name)** | |
| Description | **Alarm Annunciator** |
| Name | **Parking Garage A Alarm** |
| **I/O** | |
| Segment I/O Events | (Collection) |
| Type | Input |

**Name**
The I/O Reference's Name.

Here, you define an event and type for the reference. The system creates an I/O reference point in the left column of the dialog box and assigns it a reference ID number.

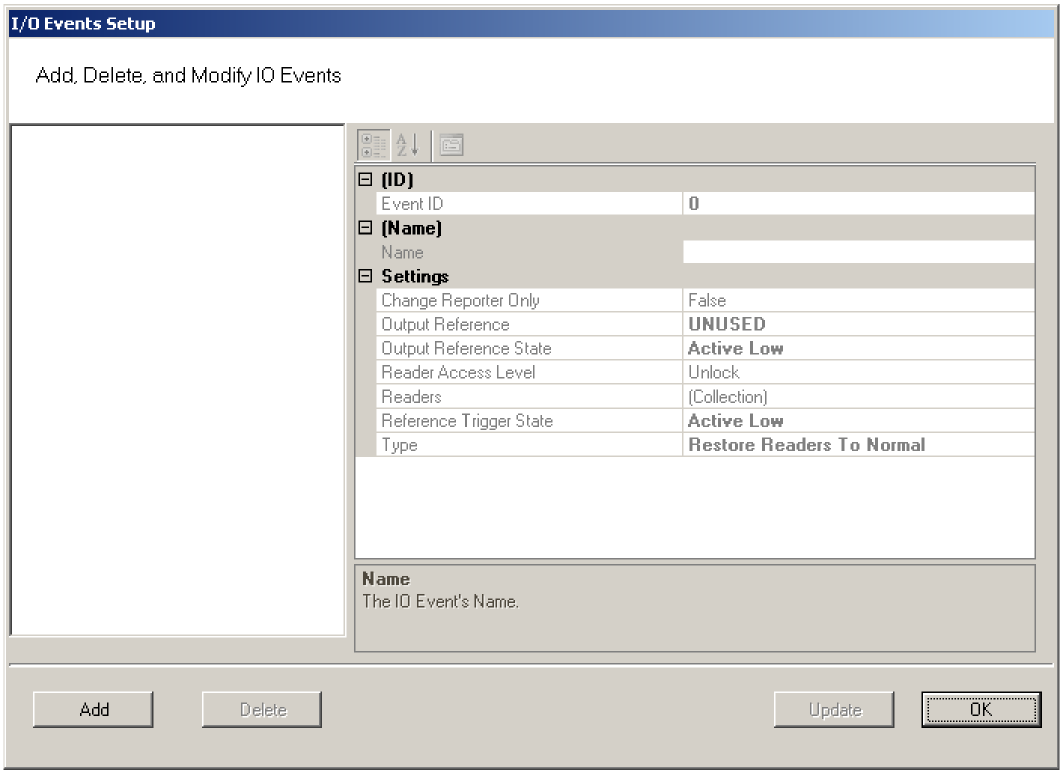
2 Click Add.

3 Under Description, replace the default description “Reference1’ with a description that will have meaning for your segment, such as Alarm Annunciator.

4 Under Name, replace the default name “Reference1” with a name that will have meaning for your segment, such as Parking Garage A Alarm.

5 Under the I/O category, click the Segment I/O Events field and select the ellipsis button at the far right. This will open the I/O Events Setup window.

Figure 82 I/O Events Setup



I/O Events Setup

Add, Delete, and Modify IO Events

| | |
|---|---|
| ⊟ (ID) | |
| Event ID | 0 |
| ⊟ (Name) | |
| Name | |
| ⊟ Settings | |
| Change Reporter Only | False |
| Output Reference | UNUSED |
| Output Reference State | Active Low |
| Reader Access Level | Unlock |
| Readers | (Collection) |
| Reference Trigger State | Active Low |
| Type | Restore Readers To Normal |

Name
The IO Event's Name.

From here you can create an event, check the device's current state of operation, define an access level, associate it with a reader in the system, define a trigger state (high or low), and define the type of event to be triggered.

**Note:** The system recognizes the WAC as any other "reader" in the system. It will appear in the referenced dialog boxes as a reader; however, you will recognize it by its MAC address.

6 Click the Add button. The system creates an Event ID and adds it to the list in the left hand column.

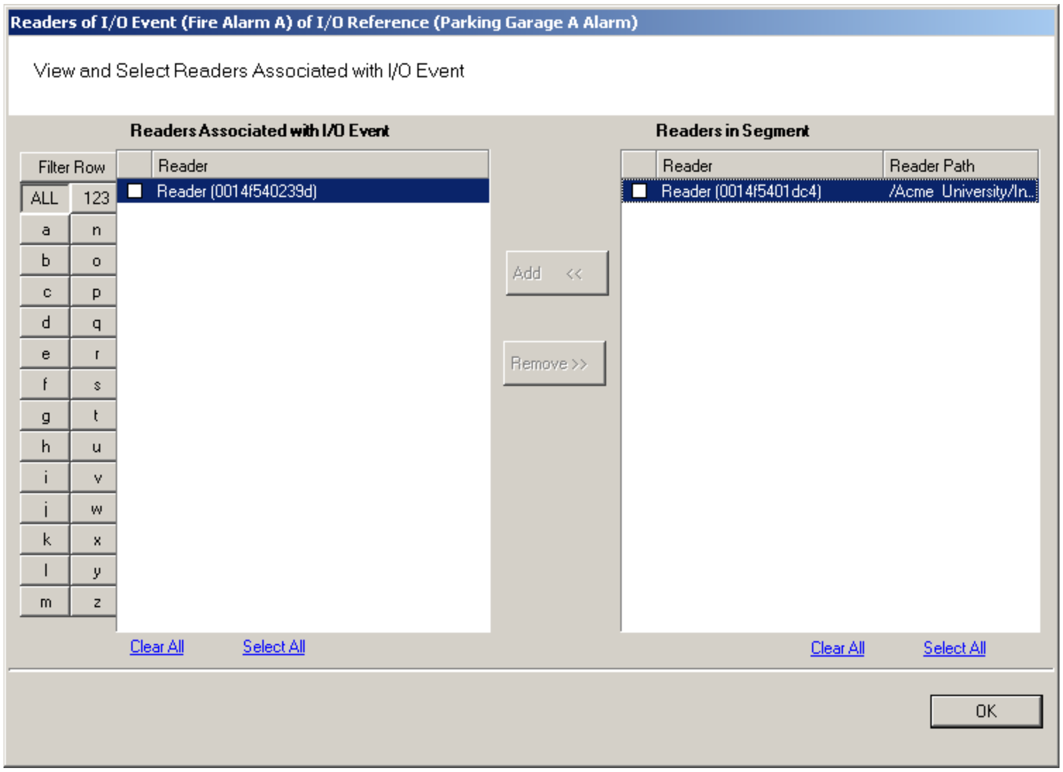
7 Enter a name for the event, such as Fire Alarm A.

8 Under the Settings Category, click the Readers field and click the ellipsis button.

9 This will open up a new window. See Figure 83. Select a device from the Readers in Segment section that will be associated with the event.

10 Click Add << to add it to the list of Readers Associated with I/O Event list.

Figure 83 Associating an I/O event with a Reader



Readers of I/O Event (Fire Alarm A) of I/O Reference (Parking Garage A Alarm)

View and Select Readers Associated with I/O Event

Readers Associated with I/O Event

| | Reader |
|---|---|
| □ | Reader (0014f540239d) |

Readers in Segment

| | Reader | Reader Path |
|---|---|---|
| □ | Reader (0014f5401dc4) | /Acme University/In... |

11 Click OK to save the association and return to the Setup dialog.

12 In the Reader Access level field, select either Unlock or Lockout from the drop-down list.

13 In the Reference Trigger State field, select either Active High or Active Low from the drop-down list (this reference will act as a toggle from one state to the other).

14 Under Type, select the event type from the drop-down list.

- Restore Readers To Normal
- Change Output Reference
- Override Reader Access Level
- Override Timezone User Group Access
- Restore Output Reference To Normal.

15 Click Update and continue defining devices then click Finish to save your settings and exit the dialog box.

## Misc

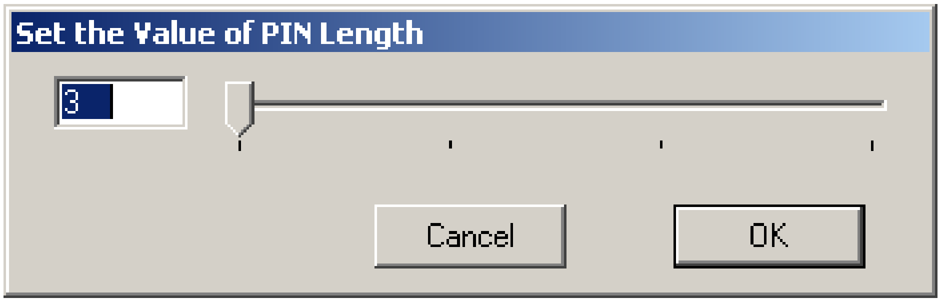
This category contains three fields (Contact 1, Contact 2, and Reference) that you can use to store any miscellaneous information you that will be helpful to you and your system. For example, you may decide to enter the phone number or email address for Stanley Technical Support in case you experience technical difficulties.

## PIN Settings

If your system will require user PINs, you may set the PIN length here. Perform the following steps.

1 Click in the PIN Length field, and select the ellipsis button at the far right. The PIN Length window opens.

Figure 84 Set the Value of PIN Length



2 Set the value to a number between 3 and 6 by typing it in or sliding the bar to select the position of the PIN length you will use on segment cards. Then, press OK.

# Adding Users to the Segment

The system is now ready for you to add users. Follow the steps in this section the first time you enter users, and each time you add a new user to the system. To get started, navigate to the Users tab within the Configurator module.

## Before You Begin

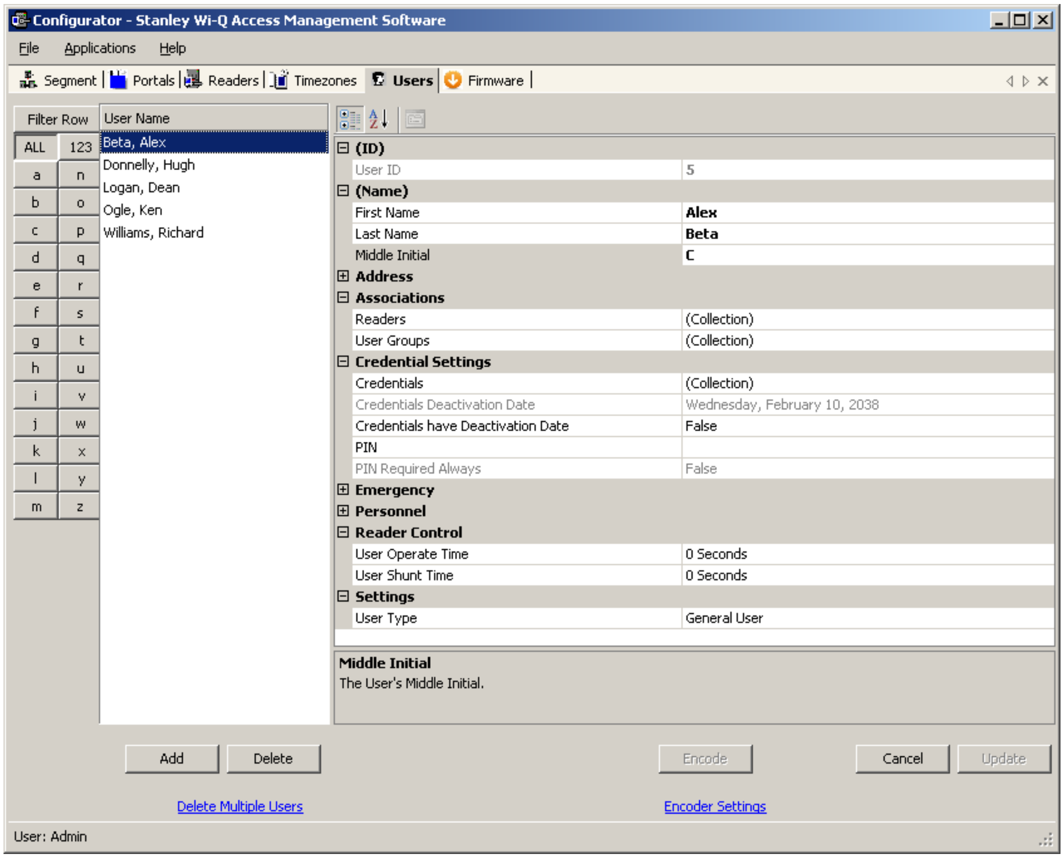
Before you begin adding users to the system for the first time, be prepared to address the following items:

| If... | Then... |
|---|---|
| You plan to use only keypad Controllers | AMS assigns a unique keypad credential to each new user and automatically registers it with the system. |
| You plan to use card readers | You must know the card type and settings required for that type. |
| You plan to use a serial scanning device at your computer to register user credentials | The scanning device must be attached to the computer com port and you must be able to identify that port (Com1, Com 2) when you register the credential. |
| You plan to use local readers to register credentials | Know the reader name and locations to be used. |
| You plan to manually enter the credential numbers | Have a credential number list or creating conventions ready to enter. |

**Note** If you do not have this information, contact your System Administrator before you begin.

## Users Tab Overview

Figure 85 Users Tab



User Name

- Beta, Alex
- Donnelly, Hugh
- Logan, Dean
- Ogle, Ken
- Williams, Richard

| | |
|---|---|
| **(ID)** | |
| User ID | 5 |
| **(Name)** | |
| First Name | **Alex** |
| Last Name | **Beta** |
| Middle Initial | **C** |
| **Address** | |
| **Associations** | |
| Readers | (Collection) |
| User Groups | (Collection) |
| **Credential Settings** | |
| Credentials | (Collection) |
| Credentials Deactivation Date | Wednesday, February 10, 2038 |
| Credentials have Deactivation Date | False |
| PIN | |
| PIN Required Always | False |
| **Emergency** | |
| **Personnel** | |
| **Reader Control** | |
| User Operate Time | 0 Seconds |
| User Shunt Time | 0 Seconds |
| **Settings** | |
| User Type | General User |

**Middle Initial**
The User's Middle Initial.

In the Users Tab, all users currently in the system display in the list on the left. If you have a large number of users, you can use the alphabet buttons on the far left to quickly sort through the list. Users Categories display on the right. By default, these categories display as shown; however you can click the A-Z sort button to display categories alphabetically. Here you can add or remove users from the system, set their credentials, and include any personal information needed to identify that person in the system.

If an ellipsis button displays when you select a field, additional parameters are available for selection. From here you will define user name and address information and access parameters such as readers, user groups, credentials, PIN, and so on.

**Note** If you see a need for additional fields to define for your Users, contact your System Administrator. They can add more fields to the Users Tab, or create additional User Fields unique to your organization.

The following sections describe each category in the Users Tab, and present steps for adding and configuring users in the system.

**ID —** When you add a user, the system automatically assigns them a unique ID and displays the number in the User ID field.

**Name —** Provides entry fields for Users' first and last name and middle initial.

### Adding a User Name

1 In the Users Tab, select the Add User button. In the ID category, the system will display a new unique User ID.

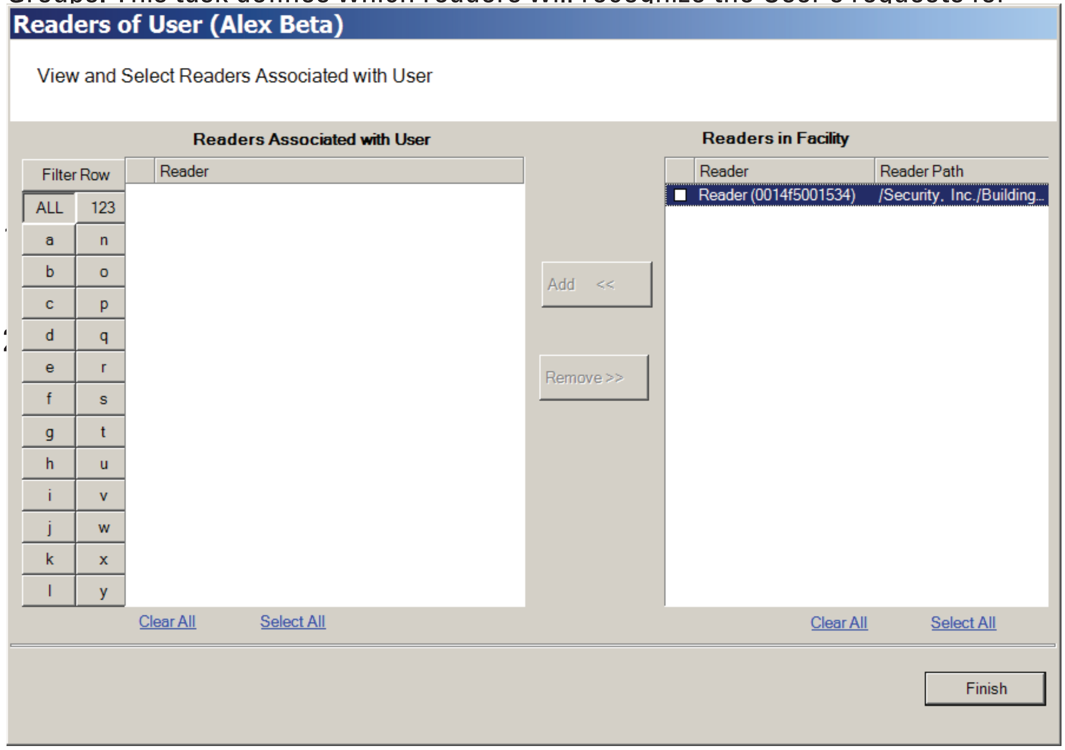
2 In the First Name line, highlight and replace the default text (example: User1) with a first name.

3 In the Last Name field, highlight and replace the default text ("_New") with a last name. Add a Middle Initial if needed.

**Note** The Update button will flash to remind you to update your settings. You can update each time you add a user, or wait until all user information is added. The software will automatically update your settings when you exit the Users tab.

**User Defined Categories and Fields—** If your segment has been configured with user defined categories and fields, such as Address, City, Zip Code, enter the information as configured.

**Associations —** In this category, you associate Users with Readers and User Groups. This task defines which readers will recognize the User's requests for



Readers of User (Alex Beta)

View and Select Readers Associated with User

Readers Associated with User

| Reader |
|---|

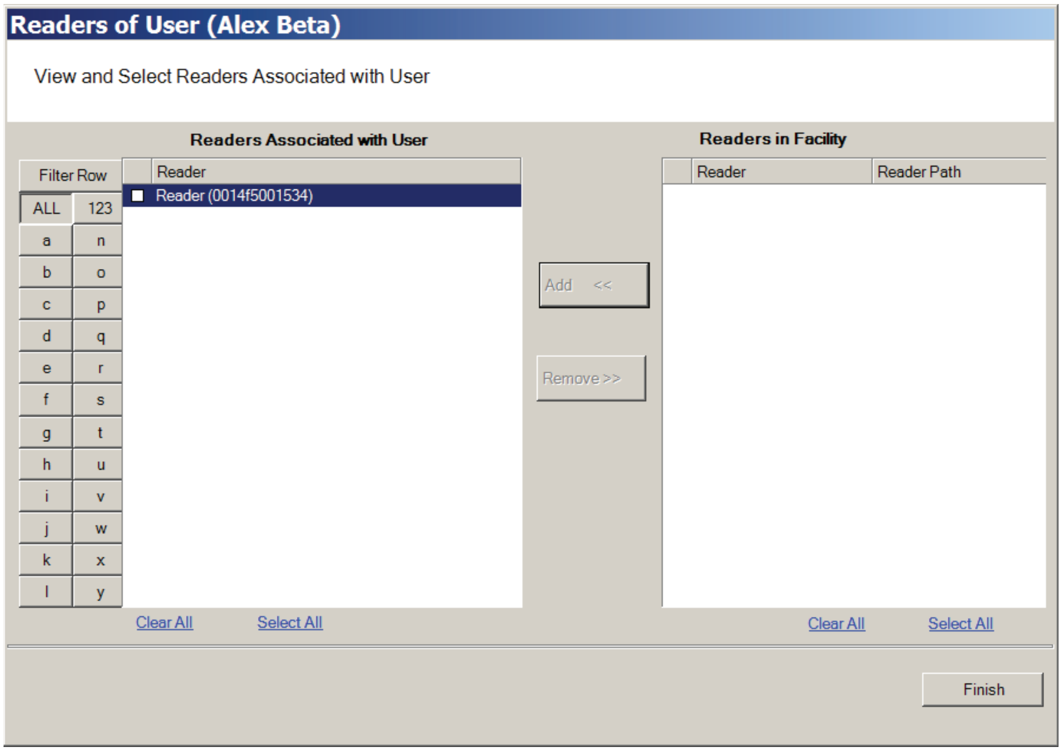
Readers in Facility

| | Reader | Reader Path |
|---|---|---|
| □ | Reader (0014f5001534) | /Security, Inc./Building... |

3 Select the reader(s) from Readers in Segment.

4 Select Add <<. The selected readers are moved from the Readers in Segment list to the Readers Associated with User list on the left. You can associate a user with any number of readers.

Figure 87 Selecting a reader to associate with a user



| Reader |
|---|
| □ Reader (0014f5001534) |

| Reader | Reader Path |
|---|---|

5 Select OK to save your settings and return to the Users Tab.

## User Groups

If User Groups have been created for your segment, these will already be associated with readers. For example, a User Group may have been defined for Laboratory Building 1. Laboratory Building1 might have six readers. By assigning the User to the Laboratory Building 1 Users Group, they will automatically be associated with all the readers in that group.

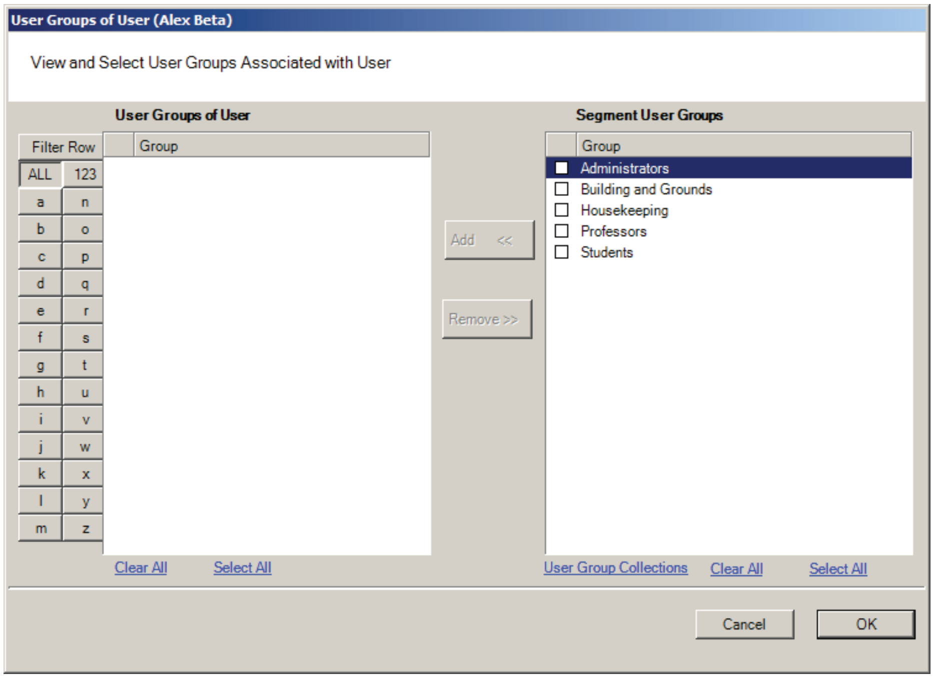
A User Group may also be defined as a Timezone Group. Timezone User Groups further define access levels for the Master Timezone. You can restrict access of certain groups of employees to a specific time period. For example, you may have a housekeeping group designated as a Timezone Group with restricted access to dormitories from 8:00 a.m. to 4:00 p.m., weekdays only. You would then assign Users from the housekeeping department to this group. Steps to add users to User Groups are presented in the following section. For more information about creating Timezone Groups, see “Timezone User Group Collections” on page 142.

Perform the following steps to add a user to a User Group.

### To add a user to a User Group

1 When adding or editing a User, in the Associations Category, click in the User Groups field and click the ellipsis button. The User Groups of User dialog box opens.

Figure 88 User Groups of User



User Groups of User (Alex Beta)

View and Select User Groups Associated with User

User Groups of User

Segment User Groups

| Group |
|---|
| □ Administrators |
| □ Building and Grounds |
| □ Housekeeping |
| □ Professors |
| □ Students |

2 Select the group(s) to associate with this user and click the Add << button. The groups are added to the User of Groups list.

3 Select OK to save your selections and return to the Users Tab. You can add or change User Groups for a user any time by returning to this list.

## Credential Settings

Wi-Q AMS tracks individual requests for access or exit from the segment by their unique credentials, and each request is recorded as a transaction in the database for reference. Whether your organization uses keypad Controllers or card readers, each user will be assigned a unique credential number. Under Credential Settings, you will enter the credential ID and number, select a credential type, and set additional parameters related to the credential type. You can add another level of security by combining an individual's credential with a personal ID number (PIN). If your organization requires a PIN, you will enter them here. Credential setup is a two-step process: First you will select the credential type to be used, then you will register the credential.

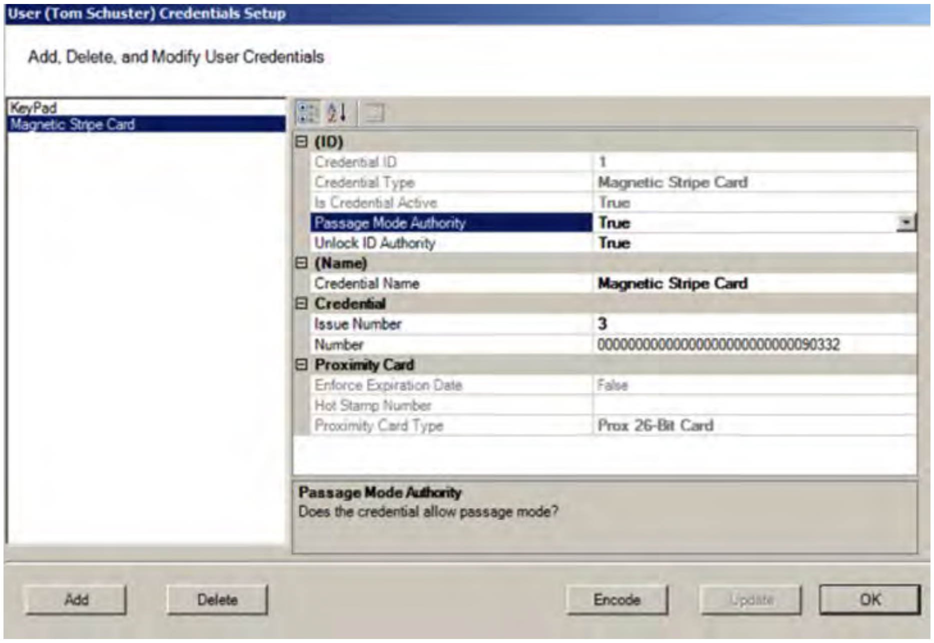
**Keypad Type —** The default credential type in AMS is Keypad. When you add a user to the system, the software assigns them a unique keypad credential number, then automatically registers it with the system. If your segment uses only keypads, once you add the new user name, you can skip to Adding PINs and Expirations Dates.

**Card Type —** If your segment uses card type credentials, you must select the card type, enter the appropriate settings, and then register the credential number with the system.

## To select the card type

1 In the Users Tab, Credentials line, select the ellipsis button. The User Credentials Setup dialog box opens. The credential types are listed on the left and the categories available for each type are listed on the right.

Figure 89 Selecting a User Credential type



User (Tom Schuster) Credentials Setup

Add, Delete, and Modify User Credentials

KeyPad
Magnetic Stripe Card

| | |
|---|---|
| ⊟ **(ID)** | |
| Credential ID | 1 |
| Credential Type | Magnetic Stripe Card |
| Is Credential Active | True |
| Passage Mode Authority | **True** |
| Unlock ID Authority | **True** |
| ⊟ **(Name)** | |
| Credential Name | **Magnetic Stripe Card** |
| ⊟ **Credential** | |
| Issue Number | **3** |
| Number | 00000000000000000000000000090332 |
| ⊟ **Proximity Card** | |
| Enforce Expiration Date | False |
| Hot Stamp Number | |
| Proximity Card Type | Prox 26-Bit Card |

**Passage Mode Authority**
Does the credential allow passage mode?

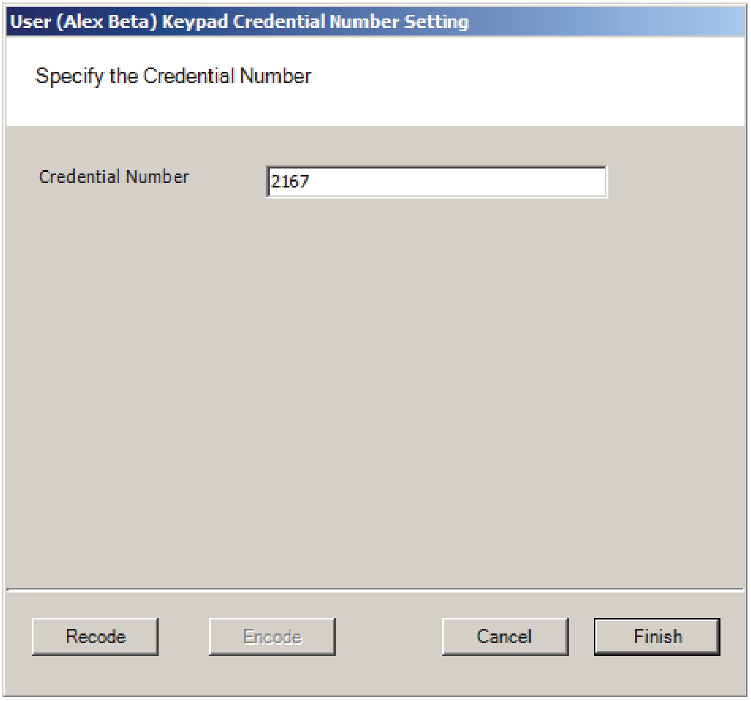
2 Select the type of credential the reader will use, for example, Keypad. The credential options in the categories on the right will change, depending on the type selected.

**Passage Mode Authority** — User credential has the authority to activate passage mode with 2 entries.

**1st Card Unlock Authority** — User credential has the authority to leave the door unlocked when in an 'unlock with ID' access mode.

3 Under the credential category, click the Number field and click the ellipsis button. The Specify the Credential Number dialog box opens.

Figure 90 Enter a user credential number



User (Alex Beta) Keypad Credential Number Setting

Specify the Credential Number

Credential Number: 2167

4 If you wish to have the software generate a new number, select Recode. Or, you may type in the user's credential number. Click Finish. You can change the credential number at a later date if needed.

5 Now you are ready to register the credential.

**Note** If the credential type you need is not in the list of card types on the left, you can add one. See "Adding a Credential Type" on page 131.

**Credentials Deactivation Date** — You can define whether a user's credentials can be automatically de-activated based on an expiration date. This is useful, for example, when entering credentials for a temporary employee or contractor. If the credential can expire, select True from the drop-down list next to the Credentials have Deactivation Date field, and then enter the de-activation date in the Credentials Deactivation Date field. If the credential cannot be de-activated, select False from the drop-down list. The default deactivation date is 26 years to ensure a user's credential is not inadvertently deactivated.

## Registering the Credential

When you click on the Number field below the Credential category and select the ellipsis button, the Specify the Credential Number dialog box opens. From here, you can enter the credential number manually, scan the user's card with a scanning device connected to your computer, or specify a reader where the user will scan their card. Steps to register each type of card are presented in the next few sections.

**Note** If you use the reader scan method, the card used must be unassigned.

### To register a Keypad credential

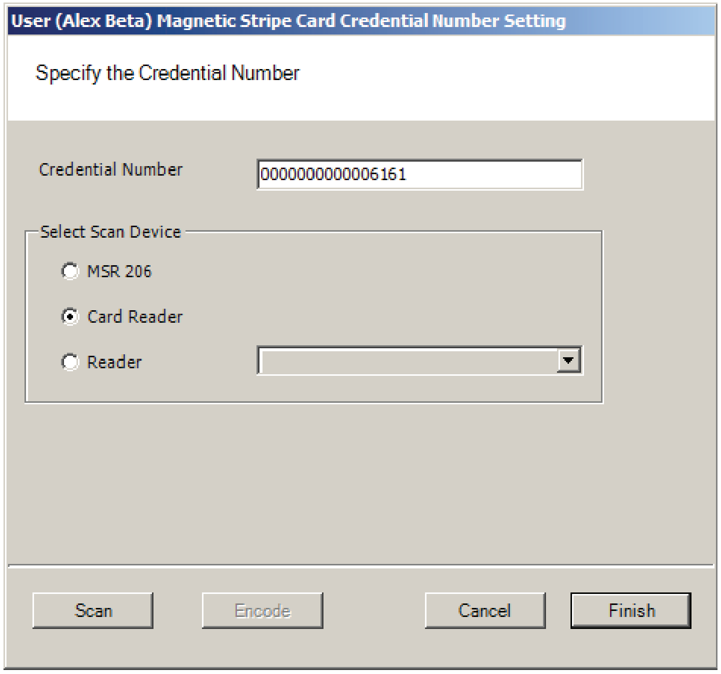
1 Keypad credentials are automatically registered by the system, and no further steps are required.

### To register a Magnetic Stripe Card credential

1 From the User Credential Setup dialog box, select Mag Card from the list.

2 Click in the Number field and select the ellipsis button. The Users Magnetic Stripe Card Credential Number Setting dialog box opens.

Figure 91 Entering a Magnetic Card credential number



User (Alex Beta) Magnetic Stripe Card Credential Number Setting

Specify the Credential Number

Credential Number: 0000000000006161

Select Scan Device

○ MSR 206

● Card Reader

○ Reader

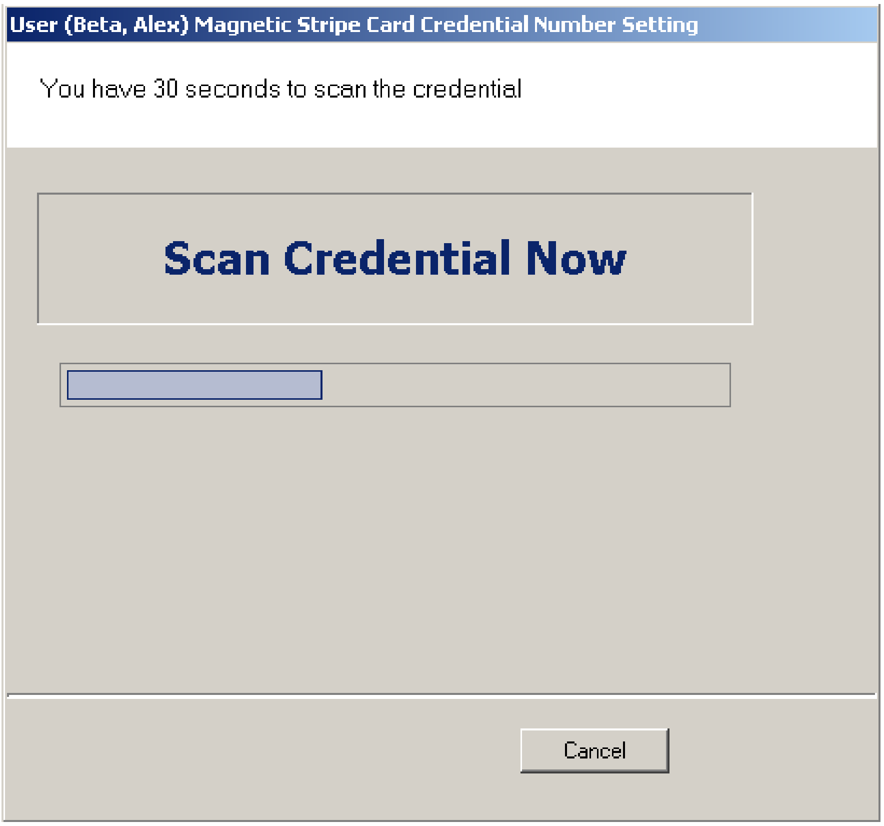
3 Enter a Credential Number manually (must be less than 16 characters, zeros will be appended) or select a scan device.

### *Using a scanning device to register a credential*

You can use a scanning device connected to your computer to register a credential.

1 Select Card Reader. When you are ready to scan the card, select the Scan button. You will have 30 seconds to scan the card.

Figure 92 Scan Credentials



User (Beta, Alex) Magnetic Stripe Card Credential Number Setting

You have 30 seconds to scan the credential

Scan Credential Now

2 When recognized, the number will display in the Credential Number text box.

3 Select Finish and return to the Credential Setup dialog box.

## Using a local reader

You can use a local reader to scan the card credentials.

1 Select Reader, and then use the drop-down list to navigate to the reader where the card will be scanned. When you are ready to scan the card, select the Scan button. You will have 30 seconds to scan the card. When recognized, the number will display in the Credential Number text box.

2 Select Finish and return to the Credential Setup dialog box.

**Note** You may need to expand the drop-down list to view all available readers. Use the highlighted area in the lower right corner.

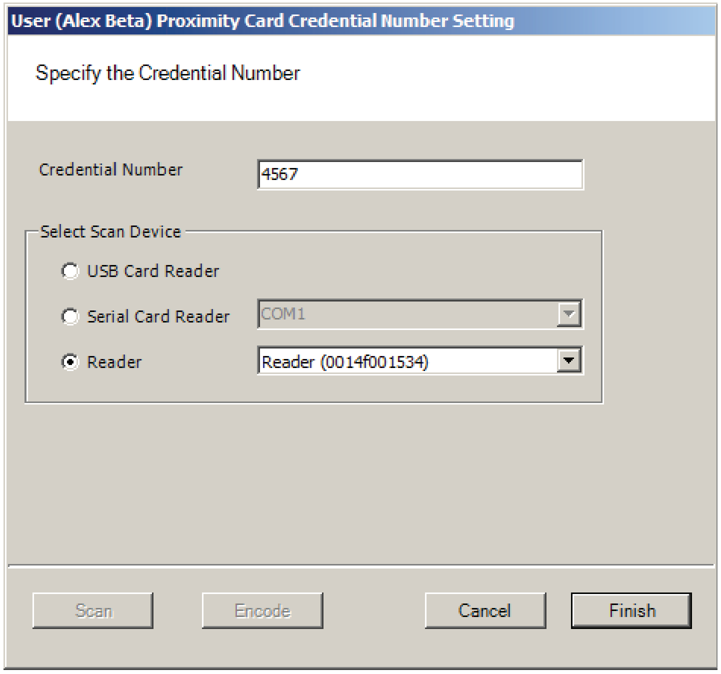
## Registering a Prox card credential

In the Proximity Card category, review the Prox Card Type. If the default entry is not the one you will use, select the field and use the down-arrow to select the correct type from the list.

### To register a Prox Card Credential

1 Select Prox Card from the list on the left. Click the ellipsis in the Number field, under the Credential category. The User Proximity Card Credential Number Setting dialog box opens

Figure 93 Entering a Proximity Card credential number



User (Alex Beta) Proximity Card Credential Number Setting

Specify the Credential Number

Credential Number: 4567

Select Scan Device

○ USB Card Reader

○ Serial Card Reader: COM1

● Reader: Reader (0014f001534)

2 Enter a Credential Number manually (must be less than 16 characters, zeros will be appended) or select a scan device:

### USB Card Reader

If you have a MSR 206 USB Card reader connected to your computer, select MSR 206.

1 When you are ready to scan the card, select the Scan button. You will have 30 seconds to scan the card. When recognized, the number will display in the Credential Number text box.

2 Select Finish and return to the Credential Setup dialog box.

### Serial Card Reader

If you have a Serial Card Reader connected to your computer, select Serial Card Reader and then select the appropriate com port from the drop-down list.

1 When you are ready to scan the card, select the Scan button. You will have 30 seconds to scan the card. When recognized, the number will display in the Credential Number text box.

2 Select Finish and return to the Credential Setup dialog box.

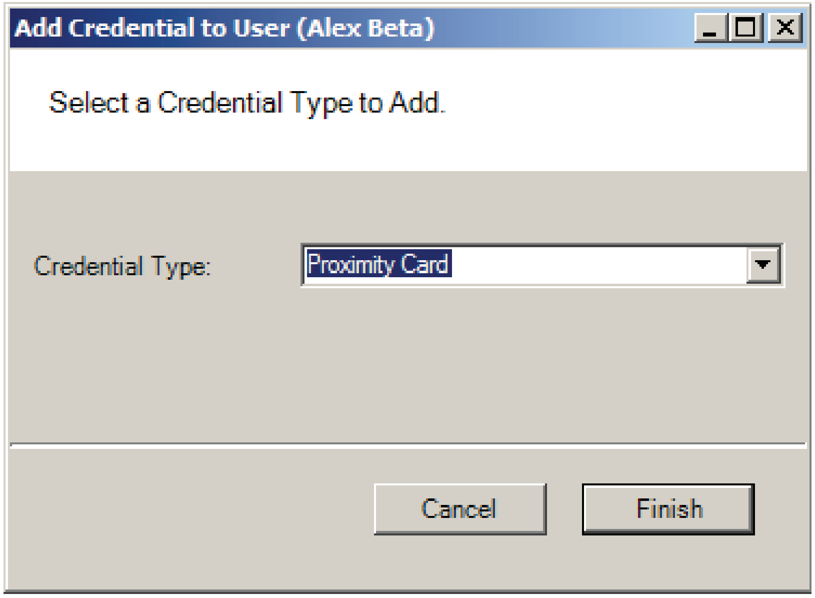
## Adding a Credential Type

At least one credential type must be defined for the system. The default credential type in Wi-Q AMS is Keypad. If you use other than keypad credential types, you can add them to the User Credentials Setup dialog box.

### To add a card type to the list

1 In the Users Credentials Setup dialog box, select the Add button. The Add Credential to User dialog box opens

Figure 94 Add Credential to User



Add Credential to User (Alex Beta)

Select a Credential Type to Add.

Credential Type: Proximity Card

2 Select the Credential Type from the drop-down list, in this case, Proximity Card.

3 Select Finish. The User <Proximity Card> Credential Number Setting dialog box opens.

4 Now, you may manually enter a credential number or scan the credential with a

scanning device.

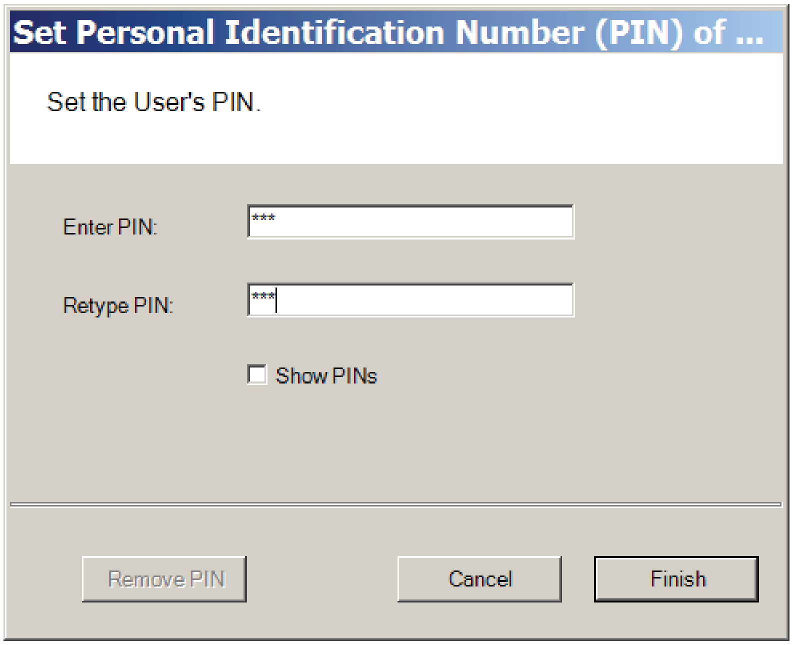
## PIN

You can add a level of security by requiring PIN numbers in addition to credentials for all users, or for specific Timezone Intervals. The default displays the PIN number as asterisks in the fields; however you can choose to show the actual PIN numbers.

### To add a PIN Number for a User

1 Under Credential Settings, click the ellipsis button in the field next to PIN. The Set Personal Identification Number dialog box opens.

Figure 95 Set PIN of User



Set Personal Identification Number (PIN) of ...

Set the User's PIN.

Enter PIN: ***

Retype PIN: ***

□ Show PINs

2 Select the Show PINs check box if you wish to view the numbers instead of asterisks as you type them in.

3 Enter a PIN number for the user. Retype the PIN below.

4 Click Finish to save the PIN and exit the dialog box.

## Reader Control

The system defaults the amount of time from the moment a reader unlocks until it relocks, and the amount of time a door can stay open before an alarm will be triggered. You can modify reader operate and shunt times for individual users. For example, to be ADA compliant, a user who is in a wheelchair or uses a walker may need more time to pass through a door. You can increase the shunt time for this user.

### To modify User Operate Time

In the Reader Control category, click the ellipsis button next to the User Operate Time and select the amount of time you wish to leave the reader in the unlocked position.

### To modify User Shunt Time

In the Reader Control category, click the ellipsis button next to User Shunt Time and select the amount of time you wish to allow for passage before an alarm will be triggered.

## Settings

Each segment user will be assigned a User and Access type, depending on the tasks they perform and the access mode needed to perform those tasks. The system supports three different types of users: General Users, Managers, and Programmers. You can have up to 65,000 individual users in the system and they can be of any User Type. User types are briefly described in the following paragraphs.

**General Users —** The majority of users will be assigned as General Users. They are allowed entry only when the access level is set to ID Required. General Users never have access when the reader is in Lockout.

**Manager —** Managers are one of the most useful types of IDs. This User Type provides the capability to change the access level of a reader with a few simple key presses. These changes can and will be overridden by the time schedule or another manager or programmer. A user with Manager privileges is always allowed access to a reader. For example, when a segment requires an individual to have access at all hours of the day without giving any extra privileges, that individual will be assigned Manager Privileges

**Programmer —** Programmers can scan all channels at the keypad reader as well as reset the reader to respond to keypad commands as in manager mode.

**Note** Managers and programmers are indistinguishable from a general user when no keypad is present.

For a list of Manager and Programmer system override codes, see “System Overrides” on page 160.

### To assign User Type

1. Under the User Tab, in the Settings category, select the field next to User Type.
2. Select a User Type from the drop-down list.

## Portal and Reader Control and Messaging

Wi-Q AMS provides a number of features to reset and restore normal operations, override locks and access levels, and temporarily remove reader association with a Portal. These right-click functions send real-time instant messages to the hardware from within the software.

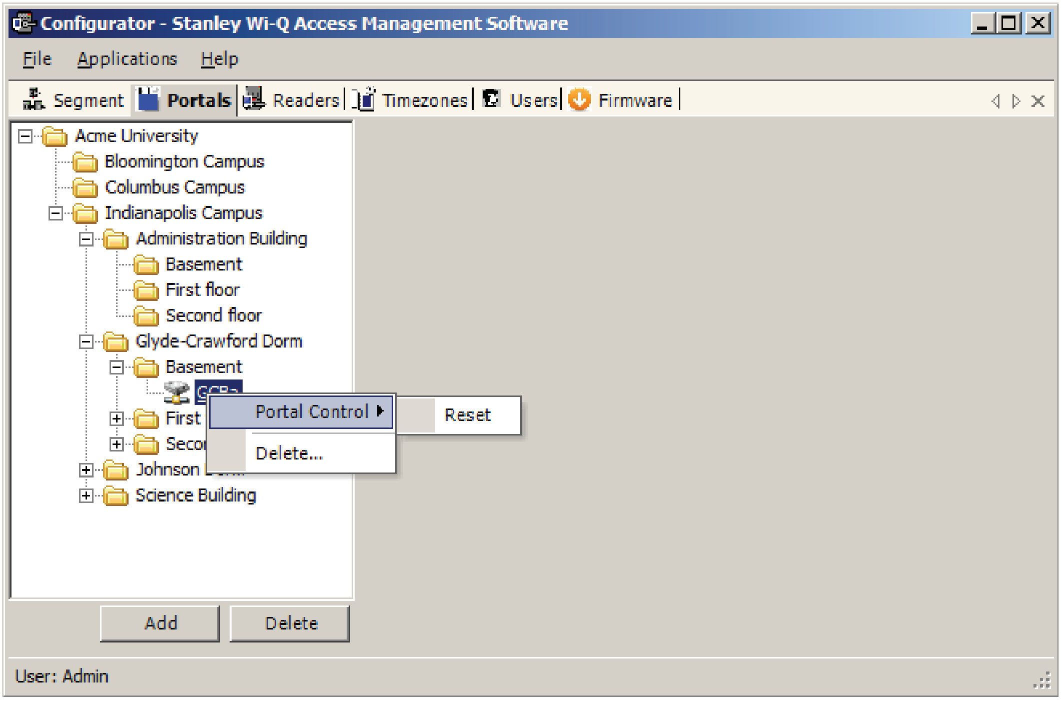
### Portal Controls

You can delete, reset and restore a Portal to normal operation without going to the physical location of the Portal. These functions are accessible via a right-click in the Readers tab of the Configurator module. You can also delete a Portal from the system with the right-click function.

### To access right-click Portal messaging

1. In the Portals Tab, right-click on the Portal and select the option from the drop-down list. The software will ask you if you wish to proceed with the operation.
2. Click Yes. If the Portal is online, the operation is performed. If for any reason the Portal is offline and unable to execute the command, the message will become obsolete after five minutes.

Figure 96  Right-click Portal messaging options



**Note** Momentary unlocks and overrides must be recognized and executed by the Portal within five minutes of the command or they become obsolete. This feature ensures that commands executed during period when the hardware cannot respond are not executed when the hardware is back online.

## Reader Controls

You can delete, reset and restore a reader to normal operation without going to the physical location of the reader. In addition to these commands, you can momentarily unlock, override the access level, perform a deep reset and remove the reader's association to a Portal all from within the software. These functions are accessible via a right-click in the Readers tab of the Configurator module. You can also delete a reader from the system with the right-click function.

**Note** To delete more than one reader at a time, hold down the control key (CTRL) and select using the left mouse key.

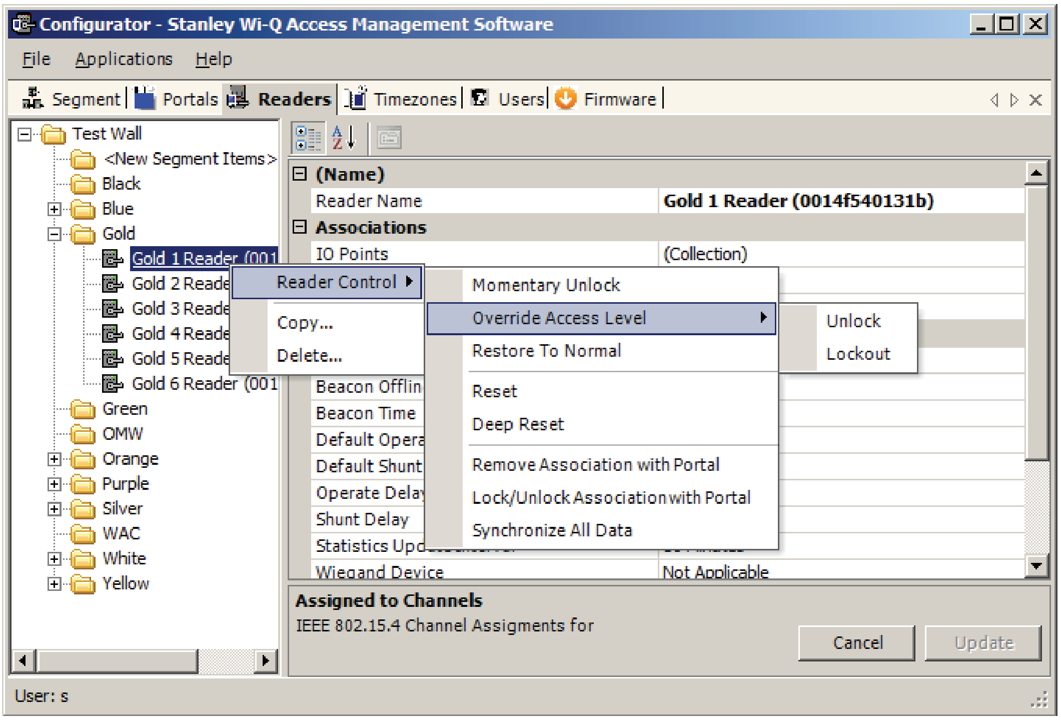
### To Access Right-Click Reader Messaging

1 In the Readers tab Segment Tree, right-click on the reader and select the option from the drop-down list. The software will ask you if you wish to proceed with the operation.

2 Click Yes. If the reader is online, the operation is performed. If for any reason the reader is offline and unable to execute the command, the message will

become obsolete after five minutes.

Figure 97 Right-click reader messaging options



(Name)

| | |
|---|---|
| Reader Name | Gold 1 Reader (0014f540131b) |

Associations

| | |
|---|---|
| IO Points | (Collection) |
| Beacon Offlin | |
| Beacon Time | |
| Default Opera | |
| Default Shunt | |
| Operate Delay | |
| Shunt Delay | |
| Statistics Upd | |
| Wiegand Device | Not Applicable |

**Assigned to Channels**
IEEE 802.15.4 Channel Assigments for

**Momentary Unlock** — A user with appropriate permissions can override the standard Timezone conditions to temporarily unlock the door controlled by a reader. The reader goes through a normal unlock-lock cycle where the default shunt and operate times apply. As soon as the command is executed, the standard Timezone conditions are restored.

**Override Access Level** — A user with appropriate permissions override the reader's access level. The override can be defined to last until the next timezone interval occurrence or to remain until a restore to normal message is sent. As soon as the command is executed, the standard Access Level conditions are restored.

**Restore to Normal** — Immediately restores all standard normal operation.

**Reset and Deep Reset —** These options allow you to perform a reset and a deep reset on a reader from within the software. The function is the same as performing a manual reset or deep reset at the reader hardware.

**Remove Association with Portal —** This command is useful when the reader has associated with a different Portal or is being removed from the segment. When you remove the reader's association with the assigned Portal, it will search for another Portal and resume communication.

**Lock/Unlock Association with Portal —** Locking a reader's association with a Portal will disallow its communication with other Portals. Unlocking an association will re-allow communication with other Portals in range.

**Synchronize All Data —** This command will resend all reader information to the Portal and update the reader hardware.

**Note** All overrides must be recognized and executed by the Portal within five minutes of the command or they become obsolete. This feature ensures that commands executed during period when the hardware cannot respond are not executed when the hardware is back online.

## Configuring Timezones

For the greatest majority of facilities, the default access level provided in the Master Timezone gives you all the options you need to manage your segment. The system works by defining different access levels at a controller rather than different times of day the segment is locked or unlocked. However, it may become necessary to define a new Timezone under certain circumstances. For example, you may want to define a separate Timezone for a specific set of readers that would operate on a totally different schedule from the main system. For this application, you would create a different Timezone and then assign the readers to that Timezone.

Timezones are created and configured in the Timezones tab within the Configurator module. Three sub-tabs exist inside the Timezone tab:

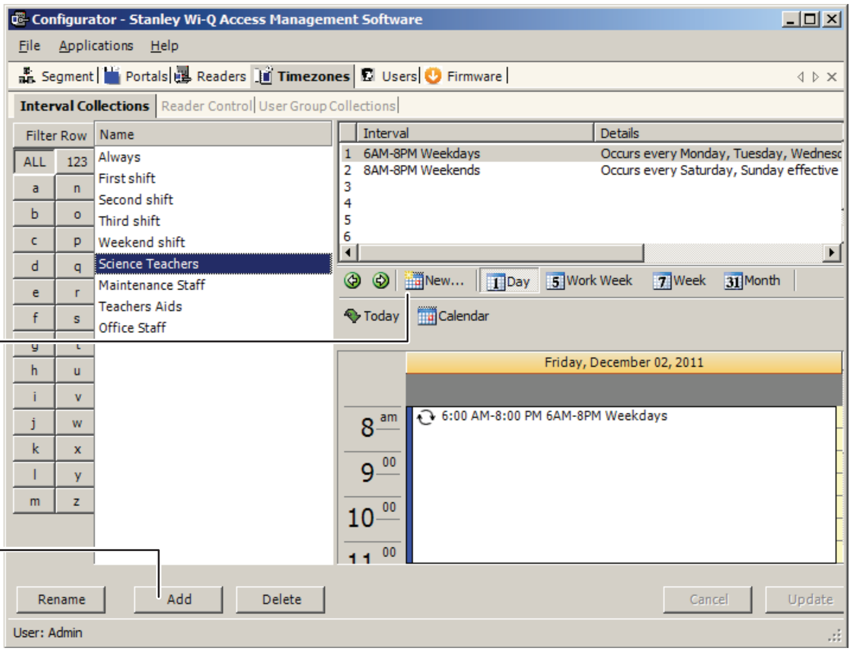
- Interval Collections — this is a collection of recurring ranges of time and days of the week, such as 6:00 am to 6:00 pm weekdays AND 8:00 am to 8:00 pm weekends.
- Reader Control — this is where you assign access levels to readers and determine how the reader will operate during assigned timezone intervals.
- User Group Collections: this is where you can add user groups to a collection and define timezone intervals to the collection.

**Note** Readers can be assigned to only one Timezone.

## To create a Timezone Interval Collection

1. Select the Interval Collections Tab under the Timezones Tab. The Interval Collection window opens.
2. Click the Add button to create a new Timezone Interval Collection.
3. Click the New button to create a new interval.

Figure 98 Interval Collection



| Name |
|---|
| Always |
| First shift |
| Second shift |
| Third shift |
| Weekend shift |
| Science Teachers |
| Maintenance Staff |
| Teachers Aids |
| Office Staff |

| | Interval | Details |
|---|---|---|
| 1 | 6AM-8PM Weekdays | Occurs every Monday, Tuesday, Wednesc |
| 2 | 8AM-8PM Weekends | Occurs every Saturday, Sunday effective |
| 3 | | |
| 4 | | |
| 5 | | |
| 6 | | |

Friday, December 02, 2011

6:00 AM-8:00 PM 6AM-8PM Weekdays

Click New to create a new interval.

Click Add to create an Interval Collection.

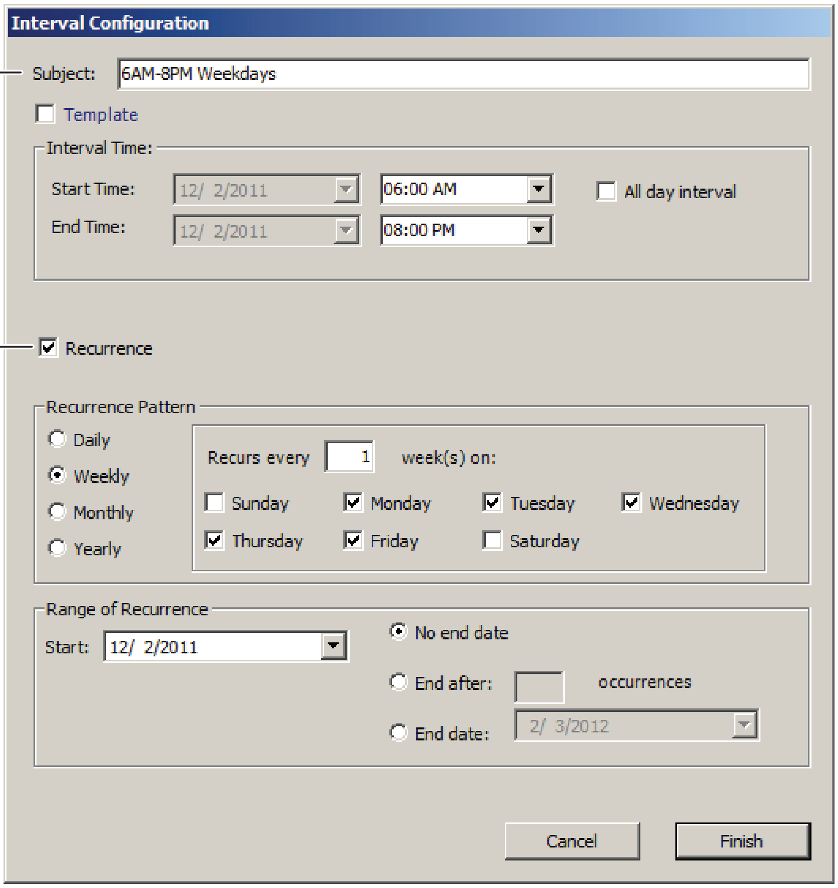
4. The Interval Configuration window opens.

5 Enter a brief name for the Interval.

6 Select the Start and End Time of the Interval.

7 Click the Recurrence checkbox.

Figure 99 Interval Configuration



Name the Interval. Tip: usually good practice to name Intervals by time ranges.

Click Recurrence if the interval repeats.

Interval Configuration

Subject: 6AM-8PM Weekdays

□ Template

Interval Time:

Start Time: 12/ 2/2011 06:00 AM □ All day interval

End Time: 12/ 2/2011 08:00 PM

☑ Recurrence

Recurrence Pattern

○ Daily
● Weekly
○ Monthly
○ Yearly

Recurs every 1 week(s) on:

□ Sunday ☑ Monday ☑ Tuesday ☑ Wednesday
☑ Thursday ☑ Friday □ Saturday

Range of Recurrence

Start: 12/ 2/2011

● No end date
○ End after: occurrences
○ End date: 2/ 3/2012

8 Select the Recurrence Pattern of the Interval.

9 Select the Range of Recurrence for the Interval.

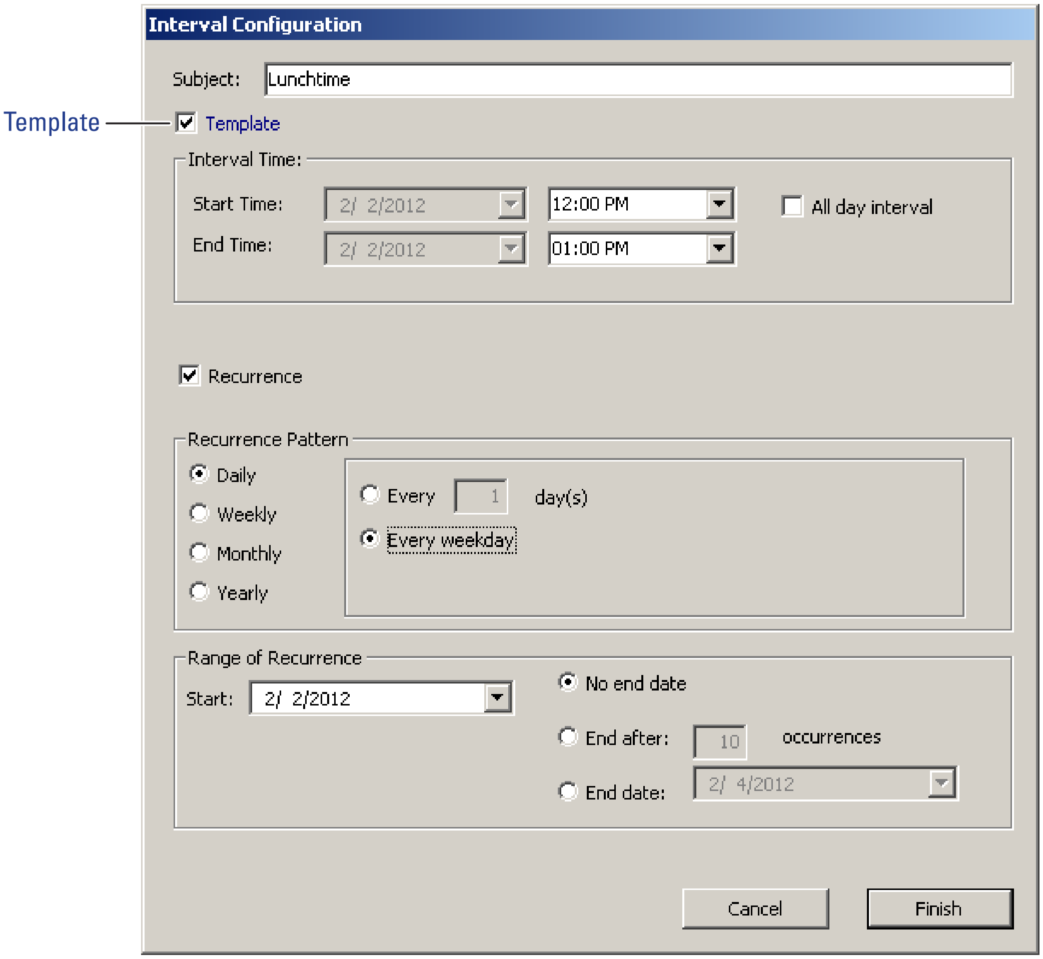
10 Click Finish to save your new Interval. This Interval is now listed as one of the intervals for the Interval Collection.

11 Repeat steps 3 to 9 to create other Intervals until the Interval Collection is complete.

### *Timezone Interval Template Feature*

At the top of the Interval Configuration window, there is a “Template” checkbox. Selecting this box will allow the timezone interval you configure to be used as a template for other intervals. For example, if you create a “Lunchtime” interval collection between 12pm and 1pm, and you select the “Template” checkbox (Figure 100), you can add that interval to an existing collection.

Figure 100 Interval Configuration Template



Subject: Lunchtime

☑ Template

Interval Time:

Start Time: 2/ 2/2012 12:00 PM ☐ All day interval

End Time: 2/ 2/2012 01:00 PM

☑ Recurrence

Recurrence Pattern

● Daily
○ Weekly
○ Monthly
○ Yearly

○ Every 1 day(s)

● Every weekday

Range of Recurrence

Start: 2/ 2/2012

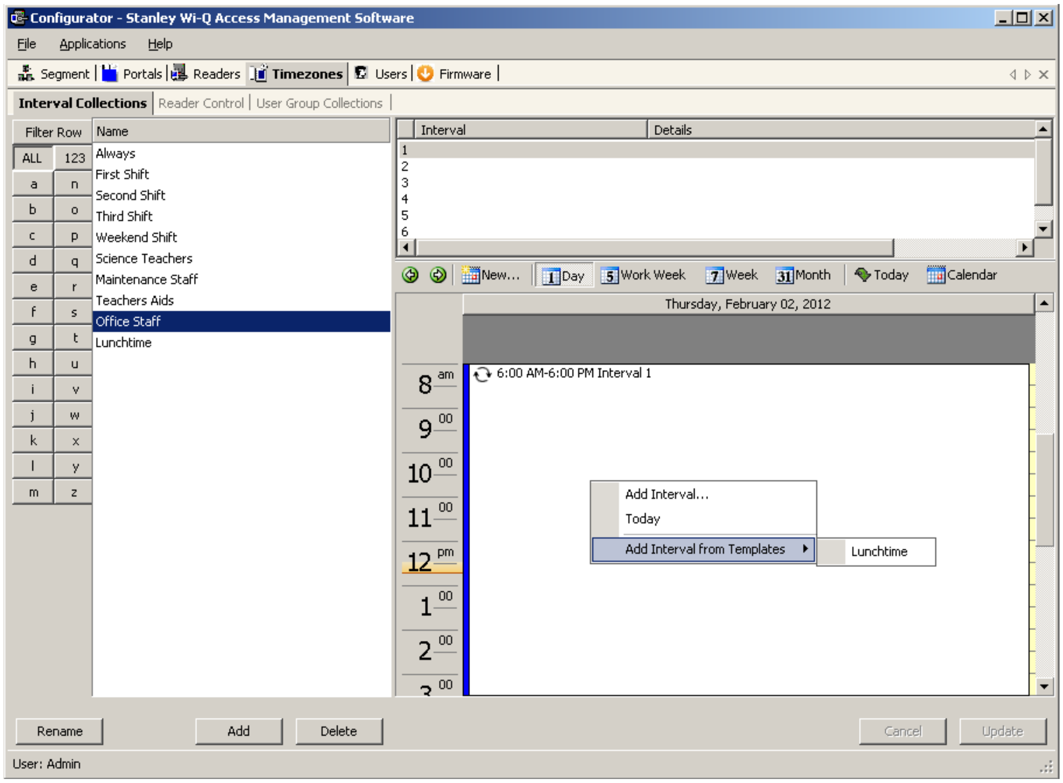
● No end date

○ End after: 10 occurrences

○ End date: 2/ 4/2012

To add the “Lunchtime” interval to another collection , select the existing interval collection from the list at the left, right-click in the calendar area, and select “Lunchtime” from the Add Interval from Templates options. In our example, we add the Lunchtime interval to the Office Staff Interval Collection. See Figure 101.

Figure 101 Add Interval from Templates



## To create a Timezone Reader Control

1 Select the Reader Control Tab under the Timezones Tab. The Reader Control Window opens.

2 Click Add to create a new Reader Control.

3 Enter a brief name for the Reader Control.

4 Select the default Access Level that will be operate for the Reader Control. This access level can be overridden for specific Interval Collections.

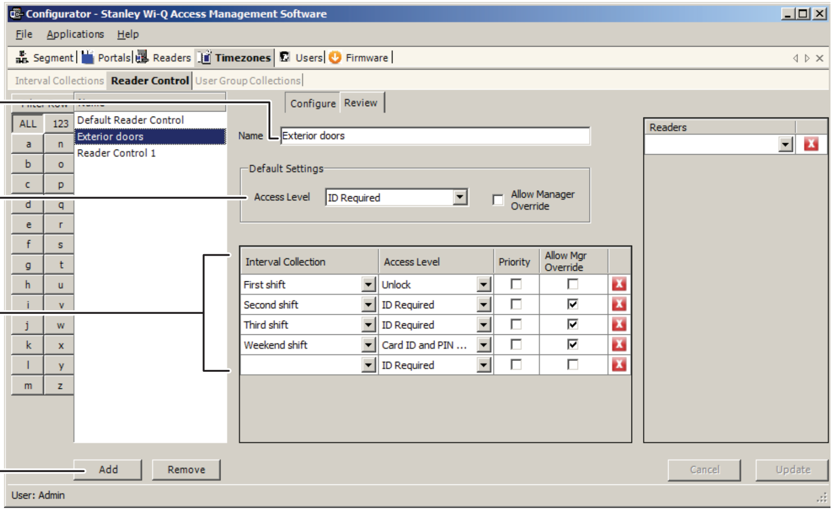
5 Select the Interval Collections when the Reader Control will operate.

6 Use the red X to delete the interval collection if needed.

7 Click Update to complete the Reader Control.

8 Select the Readers that will operate under this Reader Control.

Figure 102  Reader Control



Name: Exterior doors

Default Settings

Access Level: ID Required  □ Allow Manager Override

| Interval Collection | Access Level | Priority | Allow Mgr Override |
|---|---|---|---|
| First shift | Unlock | □ | □ |
| Second shift | ID Required | □ | ☑ |
| Third shift | ID Required | □ | ☑ |
| Weekend shift | Card ID and PIN ... | □ | ☑ |
| | ID Required | □ | □ |

Name the Reader Control.

Select what access level is required for this Reader Control.

Select the Interval Collections when the Reader Control will operate.

Click Add to create a new Reader Control.

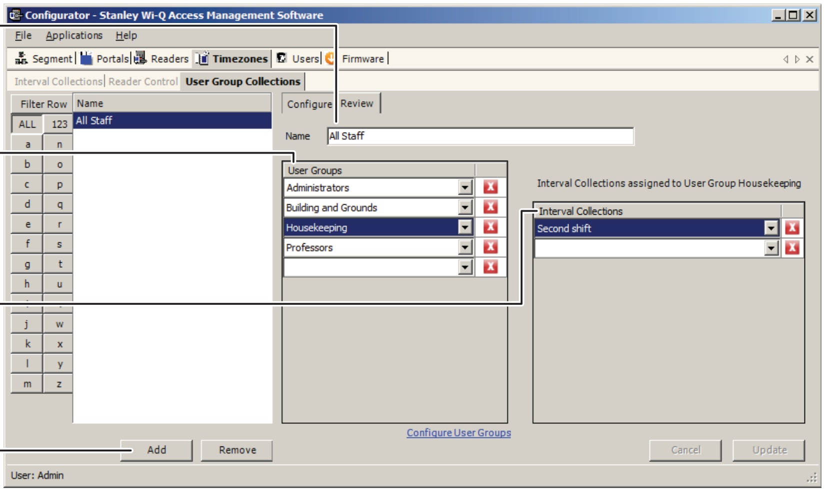
## Timezone User Group Collections

You can create up to 32 Timezone User Groups to further define access levels for the Master Timezone. You can restrict access of a certain group of employees to a specific time period. For example, you may want to create a housekeeping group, designate it as a Timezone Group, and then restrict access to dormitories only from 8:00 a.m. to 4:00 p.m., weekdays. This is a two step process. First, you will create a Users Group and designate it as a Timezone Group; then you will define the Timezone Interval for the new Timezone Group (you may want to review User Groups before starting this task)

### To create the Timezone User Group Collection

1. Select the User Group Collection Tab under the Timezones Tab. The User Group Collection window opens.
2. Click Add to create a new User Group Collection.
3. Enter a brief name for the User Group Collection.
4. Select the User Groups that will be a part of the User Group Collection. You must have set up User Group for the selections to be available.
5. Select the Interval Collections when the User Group Collection will operate. You must have set up Interval Collections for the selections to be available.
6. Use the red X to delete the association of User Groups or Interval Collections as needed. This will not delete the User Group or Interval Collections, it will only delete the association.
7. Click Update to complete the User Group Collection.

Figure 103 Creating the timezone user group collection



Name: All Staff

User Groups: Administrators; Building and Grounds; Housekeeping; Professors

Interval Collections assigned to User Group Housekeeping

Interval Collections: Second shift

User: Admin

Name the User Group Collection

Select what what User Groups will make up the User Group Collection

Select the Interval Collection when the User Group Collection will operate.

Click Add to create a new Reader Control.

# 6 Using and Managing the System

Wi-Q AMS and Omnilock provides powerful tools to manage your system: Configurator, Transactions, Statistics Monitor and Reports.

If you are the Program Administrator responsible for setting up communications between the software and system Portals and Controllers; you will spend most of your time using Configurator. If you are in personnel or security, you may be the person who adds users to the system and gives them access privileges and IDs. You will spend most of your time on the Users tab of Configurator. If you are responsible to oversee security for your organization, you will monitor all access and alarm activity using Transactions. If you are the person responsible to ensure the system is operating at maximum performance, you will use the Statistics Monitor. If your organization is small, you may use all three! You can access all applications from the Configurator main menu. You can also access these applications from the Windows Start Menu under Stanley Security Solutions.

## Wi-Q AMS and Omnilock Configurator

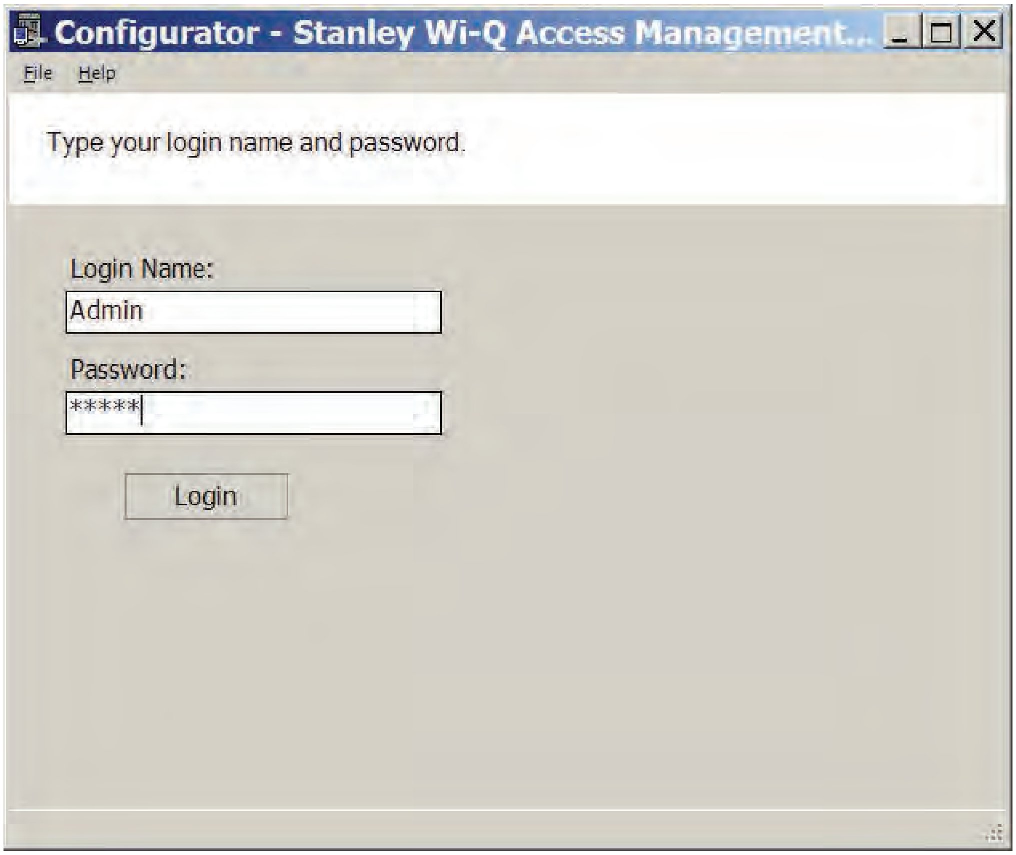
The following sections describe the essential functions you can perform using Configurator.

### Launching Wi-Q AMS Configurator

When the software is loaded onto your computer, it places a shortcut to AMS on your desktop.

1 Double-click the Configurator icon to start the application. The splash screen appears briefly, then the Login dialog box opens.

Figure 104 Logging in to Configurator



Configurator - Stanley Wi-Q Access Management...

Type your login name and password.

Login Name:
Admin

Password:
*****

If you are a AMS User, your System Administrator or IT representative must provide you a Login Name and Password. You will need this to login to the Configurator. If you are a System Administrator, see “Logging in to Configurator” on page 63 for more information about launching the software for the first time.

### To Login to the Wi-Q AMS Configurator:

1 Enter your case-sensitive Login Name and Password.

2 Select Login. Configurator opens at the Segment tab.

3 If the System Administrator has created only one segment, you are ready to begin. If more than one segment has been created, select the segment from the drop-down list. Any elements you access in Configurator will be directed to that segment.

***WARNING: Once the System login and password have been personalized for your segment, it is important to record the information in hard copy form and safeguard it in a location known to management.***

## Managing Application Users

Wi-Q AMS and Omnilock 'Application Users,'(AMS Users) as opposed to 'cardholders,' are those individuals who will operate one or all of software applications. For example, an application user might be a person in the Security department who will use only the Transactions software to monitor system access activity. Another AMS User might be a person in Human Resources or Administration who is assigned to add users to the system or change their settings.

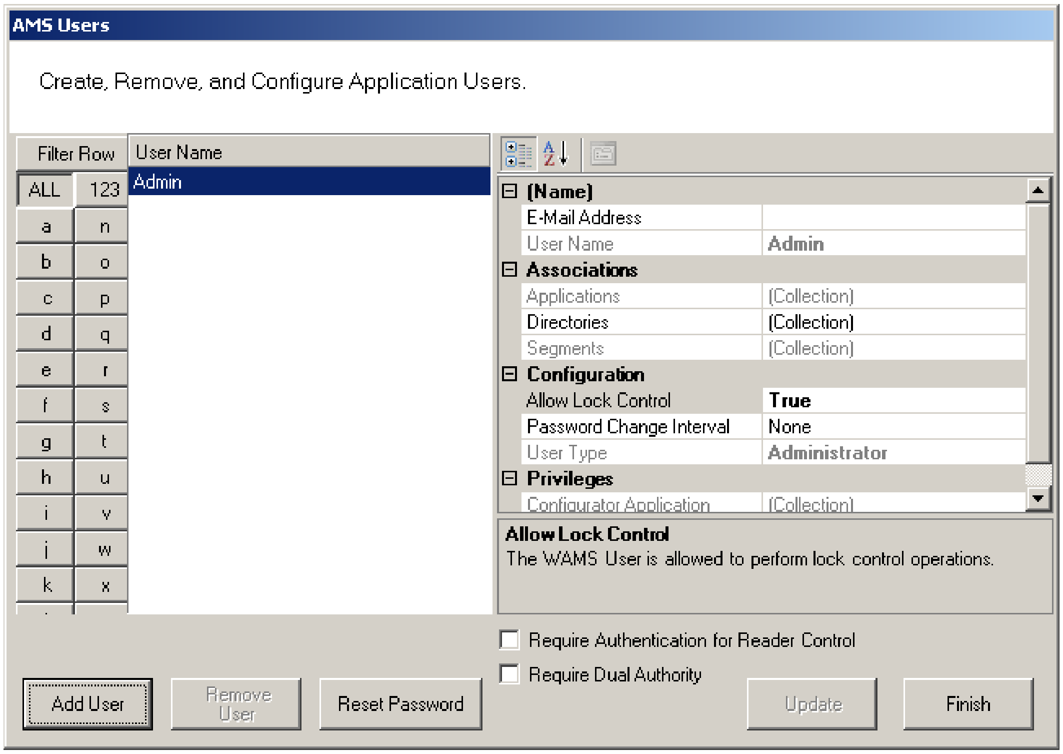
AMS Users must be added to the system as cardholders because they will require some type of physical access to the segment. However, they must also be assigned as AMS Users and be given User names and Passwords if they are to access and operate application software.

Access the Manage Application Users features via the Configurator File Menu.

## To Manage Applications Users:

1 From the Configurator main screen, select File>Manage Application Users. The AMS Users dialog box opens.

Figure 105 AMS Users



AMS Users

Create, Remove, and Configure Application Users.

| Filter Row | User Name |
|---|---|
| ALL 123 | Admin |

| | |
|---|---|
| ⊟ (Name) | |
| E-Mail Address | |
| User Name | Admin |
| ⊟ Associations | |
| Applications | (Collection) |
| Directories | (Collection) |
| Segments | (Collection) |
| ⊟ Configuration | |
| Allow Lock Control | True |
| Password Change Interval | None |
| User Type | Administrator |
| ⊟ Privileges | |
| Configurator Application | (Collection) |

**Allow Lock Control**
The WAMS User is allowed to perform lock control operations.

□ Require Authentication for Reader Control

□ Require Dual Authority

From here you can add or remove an AMS User, associate them with applications and specific facilities, and configure their lock control privileges, password change interval and assign a User Type. You can select whether require authentication for reader control or require dual authority for this user.

## To add an AMS User:

1 In the AMS Users dialog box, click Add User. The system creates “User1” in the left column.

2 In the Name category on the right, enter an e-mail address (optional), and the user name.

3 Under Associations, click the Applications field, then click the ellipsis button at the far right.

4 Select which application(s) the User will have access to. Then click Finish.

5 In the Directories field, click the ellipsis button. Select the directories linked to the User. Then, click Finish.

6 In the Segments field, click the ellipsis button. Select which segments the User

will have access to and supply contact information as needed.

7 Under the Configuration category, in the Allow Lock Control field, select either True or False from the drop-down list.

8 In the Password Change Interval field, select a change interval from the drop-down list.

9 In the User Type field, select a User Type from the drop-down list. (User Types are defined in the following paragraphs.)

10 If the user will require Authentication for Reader Control or Dual Authority, select these options at the bottom of the sheet.

11 Click Finish to save your settings.

## User Types

AMS Users can be one of four User Types: Administrator, Manager, Service, and General. You will be assigned a User Type depending on which applications you will log in to and operate.

**Administrator —** has access to all applications and all segments. This User Type would be assigned to a System Administrator, that is, someone who is responsible for set up and configuration.

**Manager —** has access to all applications. This type would, for example, be assigned to someone responsible for adding users to the system. As an additional security measure, this type could be restricted to access specific segments only.

**Service —** has access to Transactions and Statistics Monitor. This User Type can also be restricted to specific segments only, if needed.

**General User —** has access only to the Transactions and Reports applications for specific facilities. This user type would be assigned to someone in Security for example, who will monitor daily entry and exit activity and system alarms. They can not access the Configurator application.

Once an Administrator has logged in to the system, they can add AMS Users to the system. If you are designated as an AMS User, you will be assigned a login User Name and Password to access the software application(s) you need.

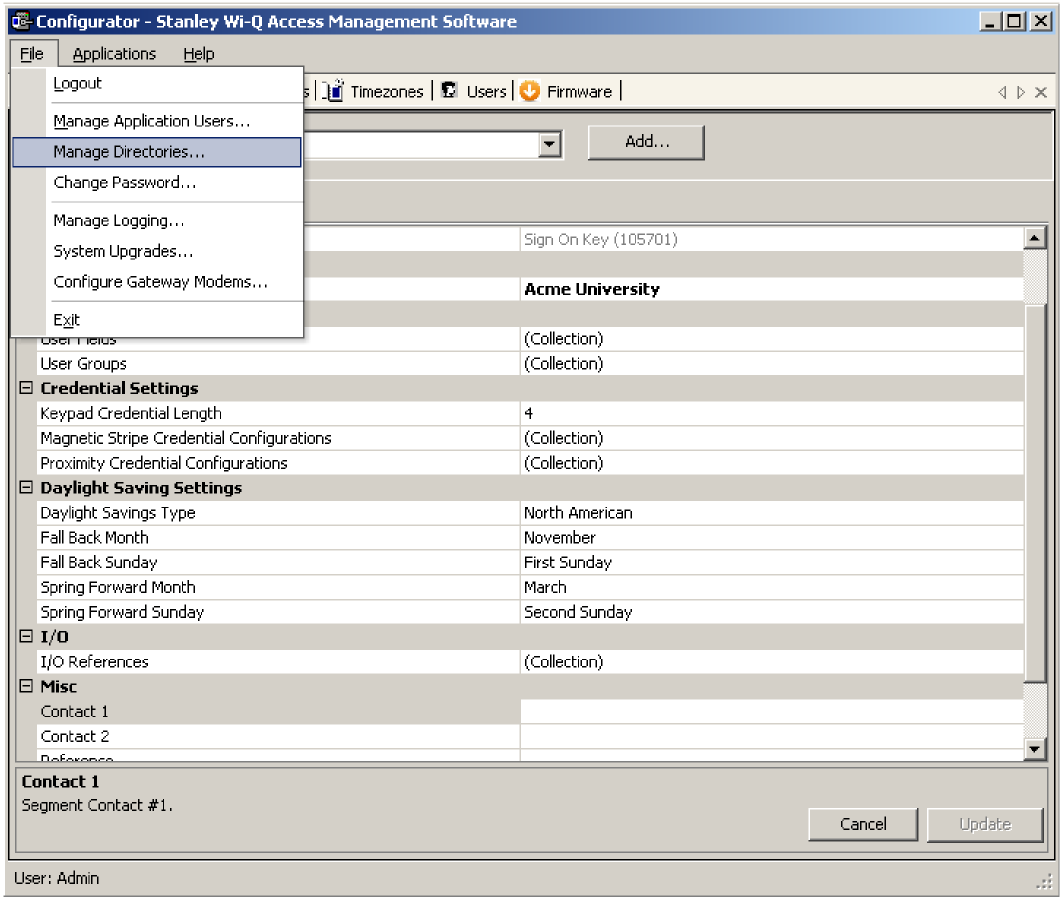
## Linking AMS Users’ Windows Accounts to Configurator

You can change the Configurator login settings so that your Windows account is linked to Configurator. This way, when you are logged into your Windows account, you won’t need a login ID or password when signing in to Configurator.

To link your Windows account to Configurator, perform the following steps.

1 From the Configurator File menu, select Manage Directories.

Figure 106 Manage Directories

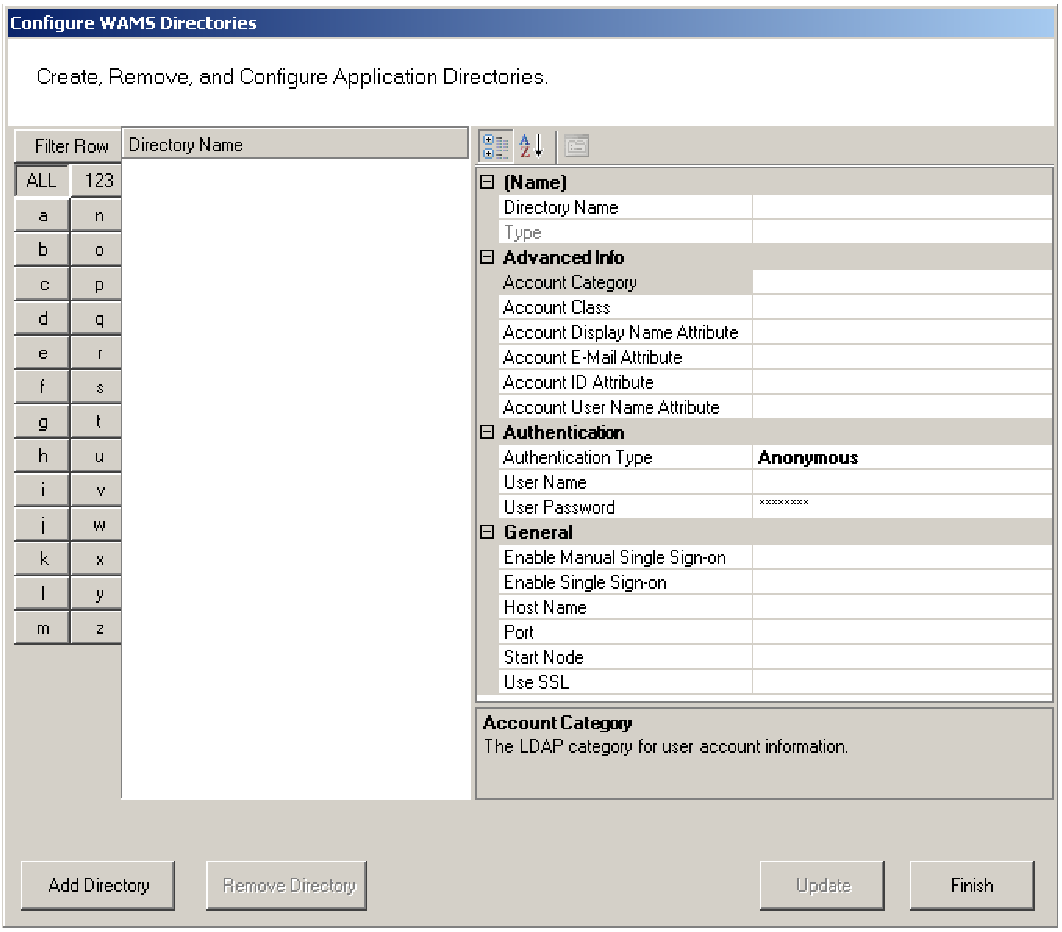


| | |
|---|---|
| | Sign On Key (105701) |
| | **Acme University** |
| User Fields | (Collection) |
| User Groups | (Collection) |
| **Credential Settings** | |
| Keypad Credential Length | 4 |
| Magnetic Stripe Credential Configurations | (Collection) |
| Proximity Credential Configurations | (Collection) |
| **Daylight Saving Settings** | |
| Daylight Savings Type | North American |
| Fall Back Month | November |
| Fall Back Sunday | First Sunday |
| Spring Forward Month | March |
| Spring Forward Sunday | Second Sunday |
| **I/O** | |
| I/O References | (Collection) |
| **Misc** | |
| Contact 1 | |
| Contact 2 | |
| Reference | |

**Contact 1**
Segment Contact #1.

2 The Configure Directories dialog box opens. Click on Add Directory.

Figure 107 Configure Directories



Configure WAMS Directories

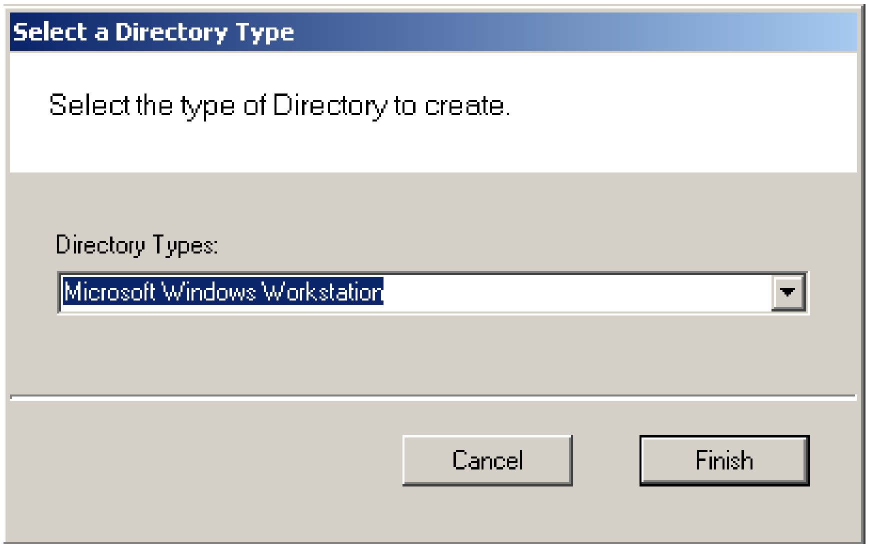
Create, Remove, and Configure Application Directories.

| | |
|---|---|
| **(Name)** | |
| Directory Name | |
| Type | |
| **Advanced Info** | |
| Account Category | |
| Account Class | |
| Account Display Name Attribute | |
| Account E-Mail Attribute | |
| Account ID Attribute | |
| Account User Name Attribute | |
| **Authentication** | |
| Authentication Type | **Anonymous** |
| User Name | |
| User Password | ******** |
| **General** | |
| Enable Manual Single Sign-on | |
| Enable Single Sign-on | |
| Host Name | |
| Port | |
| Start Node | |
| Use SSL | |

**Account Category**
The LDAP category for user account information.

3 The Select a Directory Type window opens. From the Directory Types drop-down list, choose Microsoft Windows Workstation. Then, click Finish.

Figure 108 Select a Directory Type



Select a Directory Type

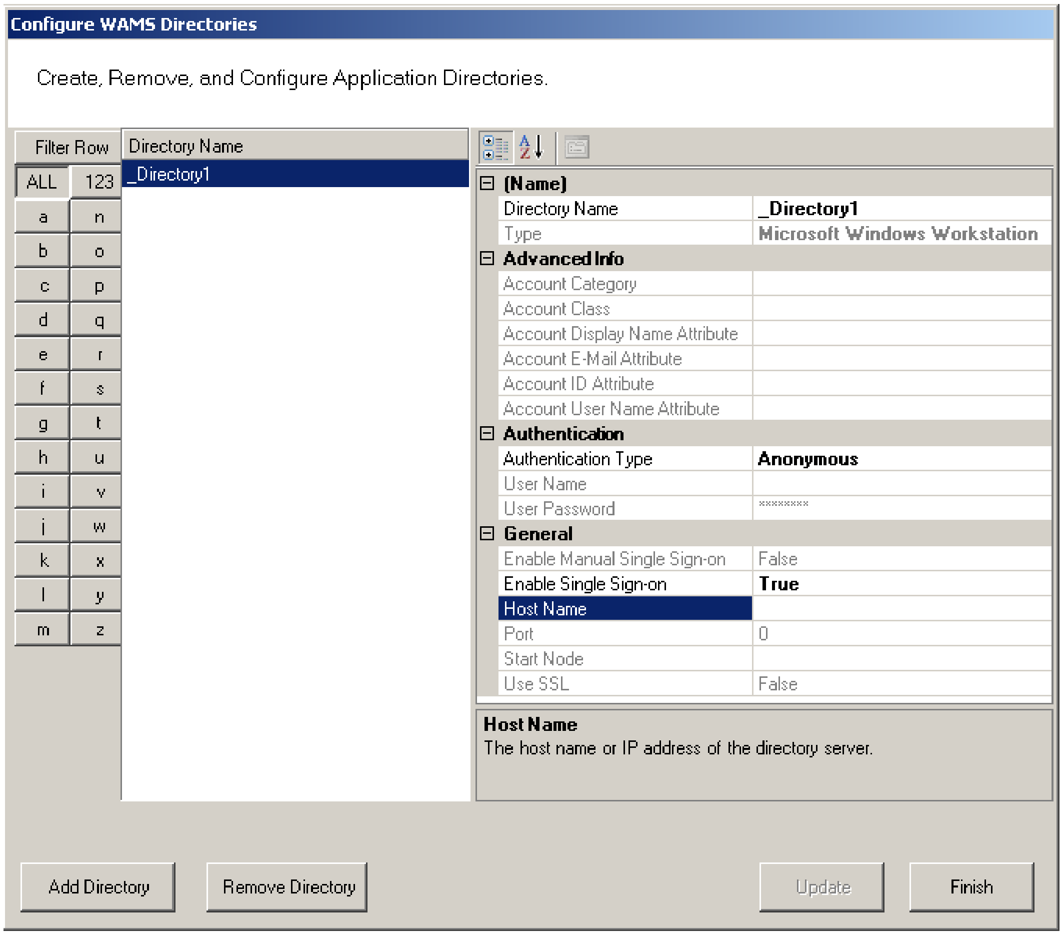
Select the type of Directory to create.

Directory Types: Microsoft Windows Workstation

4 In the Directory Name field, specify a name for the new directory or leave in

the default name. In the Host Name field, under the General category, type in the computer name of the host. Then, click Finish.

Figure 109 Directory and Host Names



Configure WAMS Directories

Create, Remove, and Configure Application Directories.

Directory Name

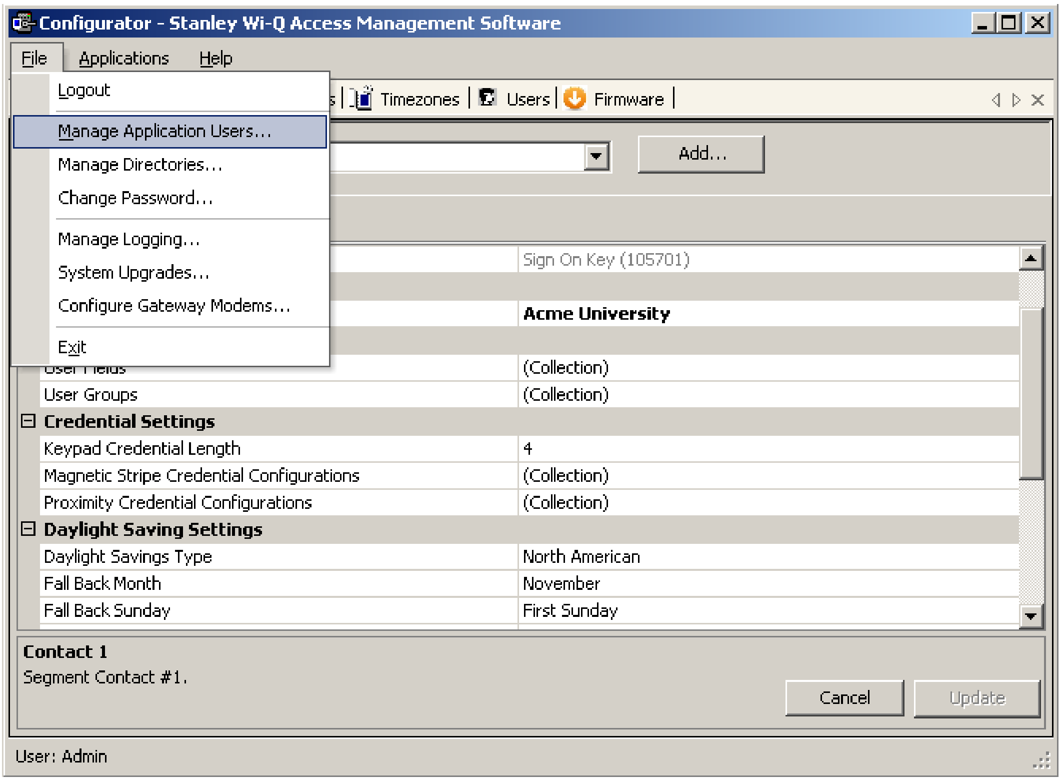
_Directory1

| | |
|---|---|
| **(Name)** | |
| Directory Name | **_Directory1** |
| Type | **Microsoft Windows Workstation** |
| **Advanced Info** | |
| Account Category | |
| Account Class | |
| Account Display Name Attribute | |
| Account E-Mail Attribute | |
| Account ID Attribute | |
| Account User Name Attribute | |
| **Authentication** | |
| Authentication Type | **Anonymous** |
| User Name | |
| User Password | ******** |
| **General** | |
| Enable Manual Single Sign-on | False |
| Enable Single Sign-on | **True** |
| Host Name | |
| Port | 0 |
| Start Node | |
| Use SSL | False |

**Host Name**
The host name or IP address of the directory server.

5 From the Configurator File menu, select Manage Application Users.

Figure 110 Manage Application Users



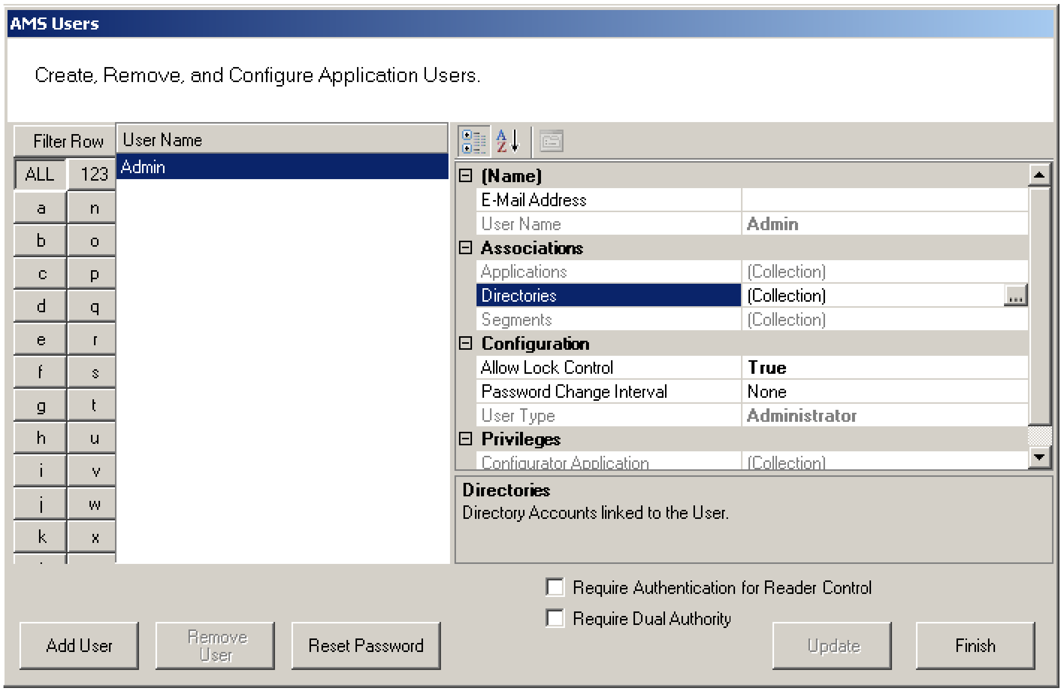
| | |
|---|---|
| | Sign On Key (105701) |
| | **Acme University** |
| User Fields | (Collection) |
| User Groups | (Collection) |
| ⊟ **Credential Settings** | |
| Keypad Credential Length | 4 |
| Magnetic Stripe Credential Configurations | (Collection) |
| Proximity Credential Configurations | (Collection) |
| ⊟ **Daylight Saving Settings** | |
| Daylight Savings Type | North American |
| Fall Back Month | November |
| Fall Back Sunday | First Sunday |

**Contact 1**
Segment Contact #1.

User: Admin

6 The AMS Users dialog box opens. Click in the Directories field, under the Associations column, and select the ellipsis button.

Figure 111 AMS Users



Create, Remove, and Configure Application Users.

User Name: Admin

| | |
|---|---|
| ⊟ **(Name)** | |
| E-Mail Address | |
| User Name | **Admin** |
| ⊟ **Associations** | |
| Applications | (Collection) |
| Directories | (Collection) |
| Segments | (Collection) |
| ⊟ **Configuration** | |
| Allow Lock Control | **True** |
| Password Change Interval | None |
| User Type | **Administrator** |
| ⊟ **Privileges** | |
| Configurator Application | (Collection) |

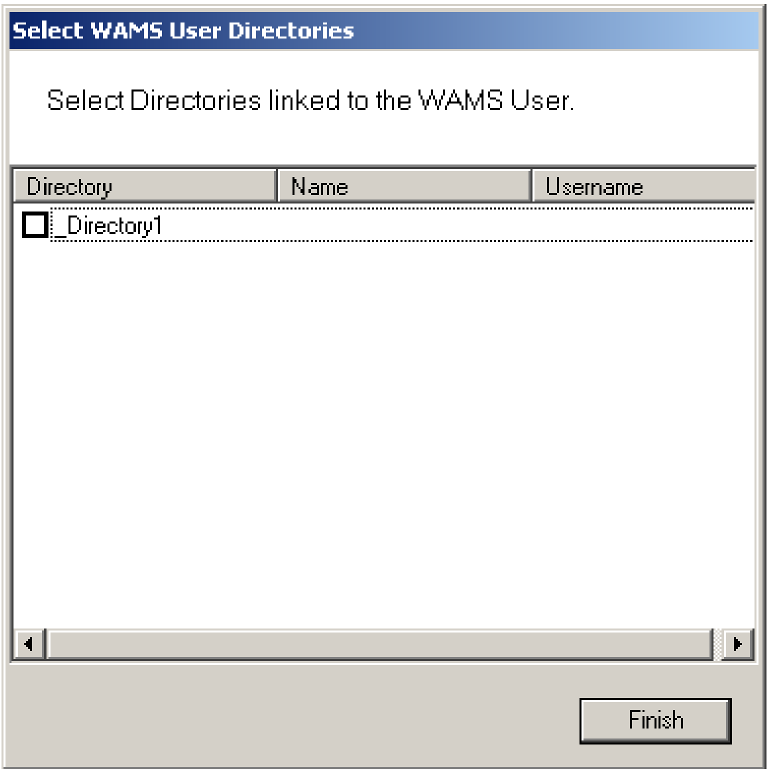
**Directories**
Directory Accounts linked to the User.

☐ Require Authentication for Reader Control

☐ Require Dual Authority

7 The Select User Directories window opens. Select the directory you created previously.

Figure 112 Select User Directories



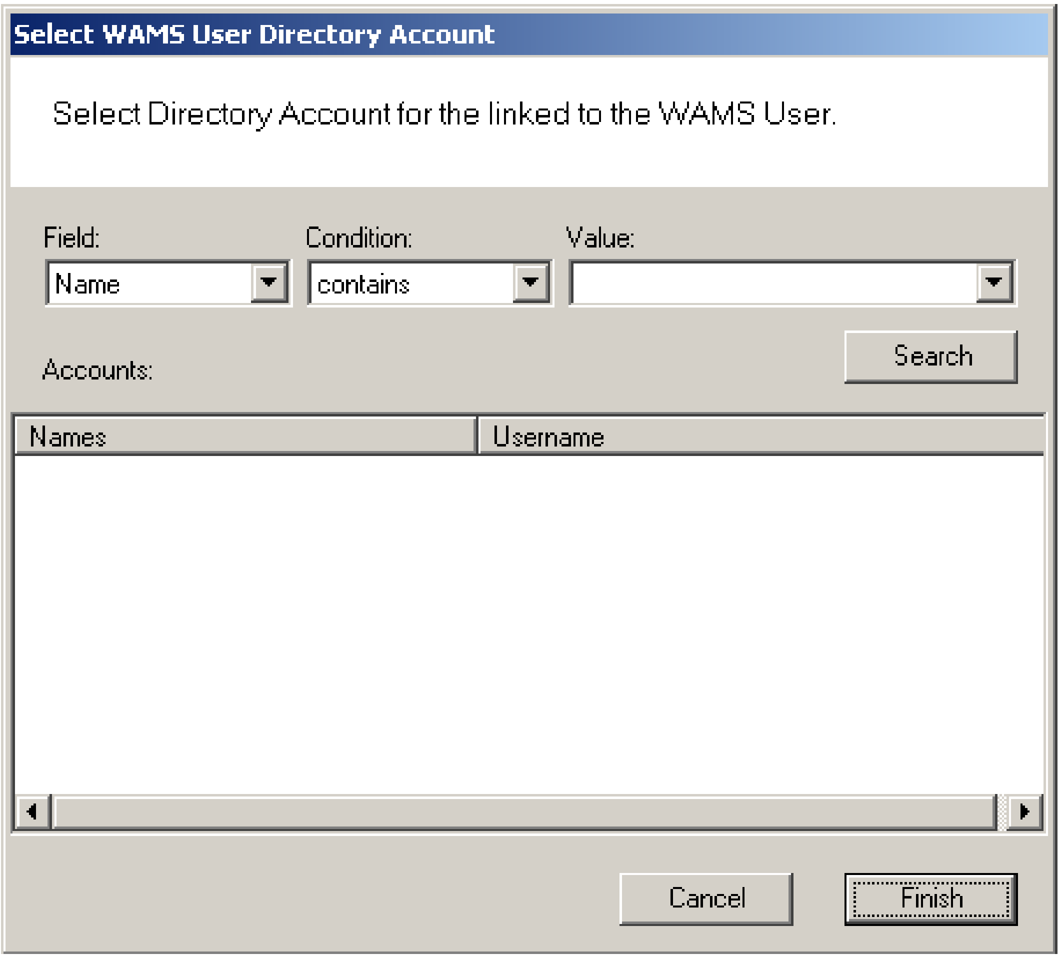
Select WAMS User Directories

Select Directories linked to the WAMS User.

| Directory | Name | Username |
|---|---|---|
| □ _Directory1 | | |

8 This will open the Select User Directory Account dialog box. Select Search, and a list of users will be generated below. Select the desired Windows user and then click Finish.

Figure 113 Select User Directory Account



Select WAMS User Directory Account

Select Directory Account for the linked to the WAMS User.

Field: Name

Condition: contains

Value:

9 Back in the Select User Directories window, the directory will now have a checkmark. Click Finish.

As long as you are logged into Windows using the account you linked to in the previous procedure, you will not be prompted to input a login ID and password the next time you log into Configurator.

## Configurator Overview

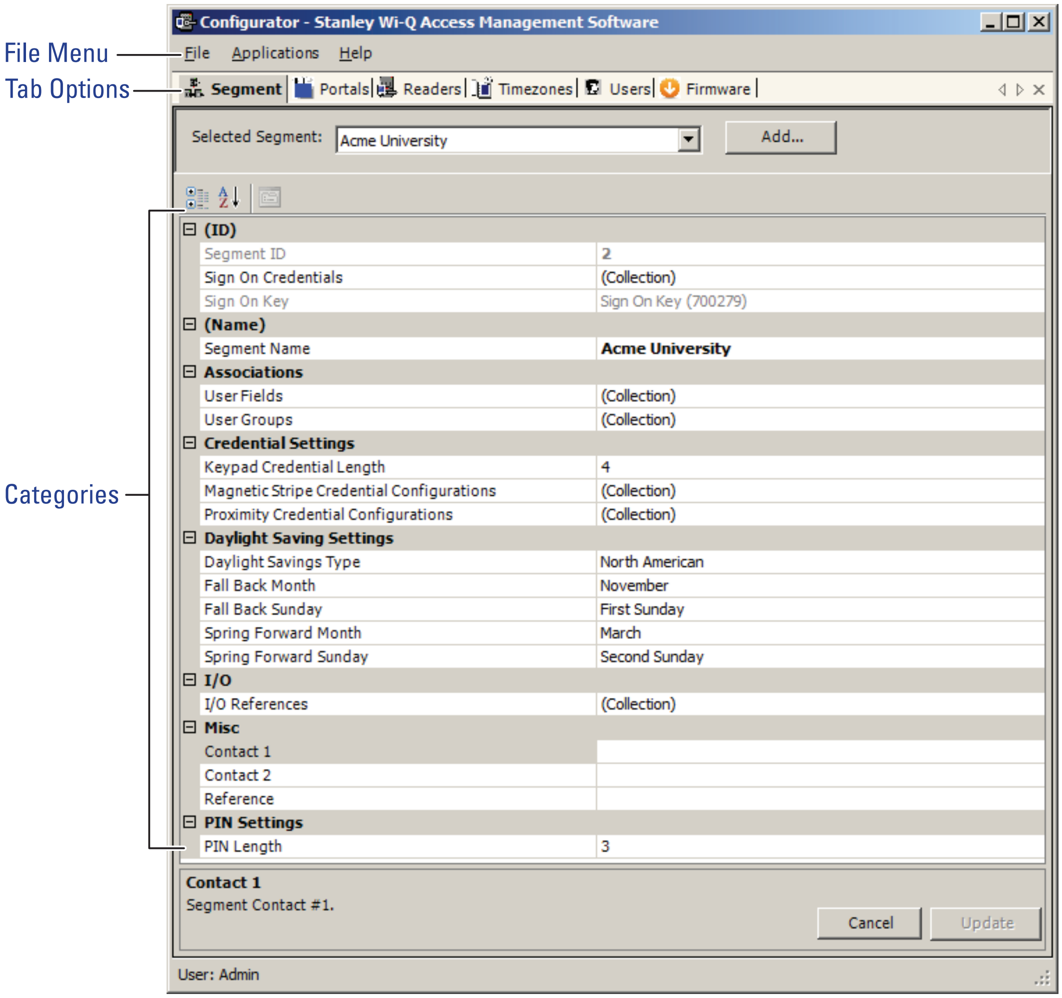
The following sections provide a brief overview of the Configurator module’s Display and Tab options.

### Display Options

All tasks in Wi-Q AMS and Omnilock start from the Configurator, which has six tabs: Segment, Portals, Readers, Timezones, Users, and Firmware. AMS operates in the Windows environment using its standard Windows conventions. You can use Configurator full screen or resize the window using the min/max buttons in the top right corner of the window.

Following is the Segment Tab in minimized view with the scroll bar visible. This is a useful option if you must run a number of other applications on your desktop and need more space on your desktop.

Figure 114 Segment Tab



Selected Segment: Acme University

| | |
|---|---|
| ⊟ **(ID)** | |
| Segment ID | 2 |
| Sign On Credentials | (Collection) |
| Sign On Key | Sign On Key (700279) |
| ⊟ **(Name)** | |
| Segment Name | **Acme University** |
| ⊟ **Associations** | |
| User Fields | (Collection) |
| User Groups | (Collection) |
| ⊟ **Credential Settings** | |
| Keypad Credential Length | 4 |
| Magnetic Stripe Credential Configurations | (Collection) |
| Proximity Credential Configurations | (Collection) |
| ⊟ **Daylight Saving Settings** | |
| Daylight Savings Type | North American |
| Fall Back Month | November |
| Fall Back Sunday | First Sunday |
| Spring Forward Month | March |
| Spring Forward Sunday | Second Sunday |
| ⊟ **I/O** | |
| I/O References | (Collection) |
| ⊟ **Misc** | |
| Contact 1 | |
| Contact 2 | |
| Reference | |
| ⊟ **PIN Settings** | |
| PIN Length | 3 |

**Contact 1**
Segment Contact #1.

User: Admin

In the Segment and Users Tabs, you can display items by category or sort alphabetically. This is useful when displaying the Configurator in full-screen view. A number of global operations are also available from the program File menu.

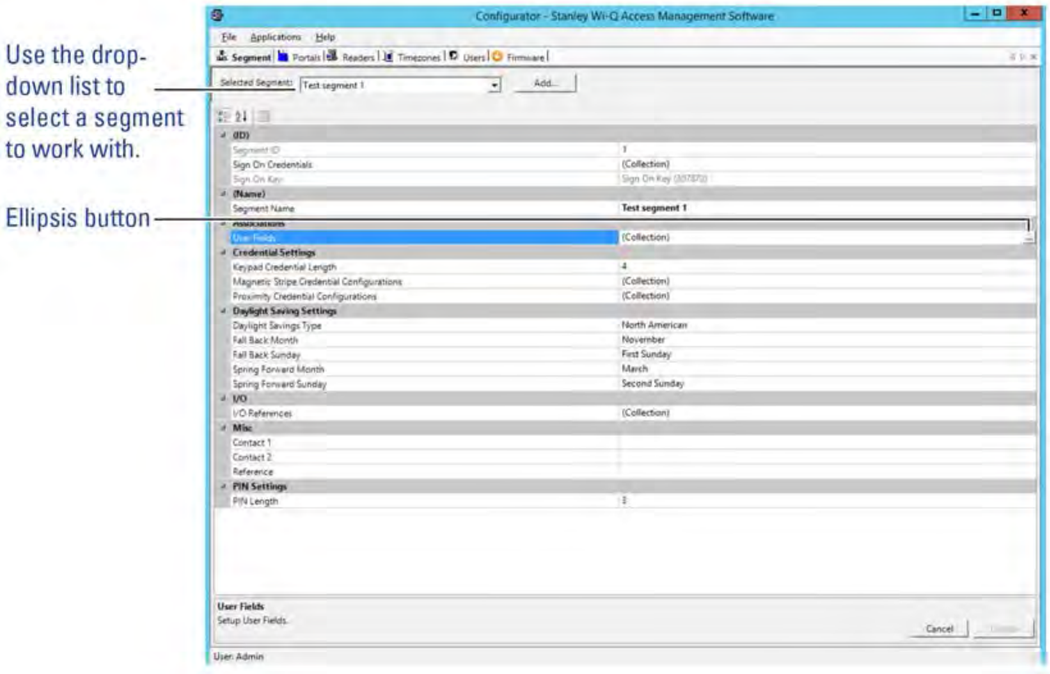
### Segment Tab

Most Segment set up tasks are performed in the Segment Tab, Figure 114. Here, the Program Administrator will create User Groups and configure the software to work with the type of segment access cards or keypad credentials you will use.

If your Program Administrator has created more than one segment, you will first select a segment to work with in the Segment Tab before moving on to work in the other tabs.

Once you select a category within Configurator, you can use the ellipsis button to configure additional settings.

Figure 115 Segment Tab Categories


Use the drop-down list to select a segment to work with.
Ellipsis button
Configurator - Stanley Wi-Q Access Management Software
File
Applications
Help
Segment
Portals
Readers
Timezones
Users
Firmware
Add...
Cancel
User: Admin

Selected Segment: Test segment 1

| | |
|---|---|
| **(ID)** | |
| Segment ID | 1 |
| Sign On Credentials | (Collection) |
| Sign On Key | Sign On Key (307870) |
| **(Name)** | |
| Segment Name | **Test segment 1** |
| **Associations** | |
| User Fields | (Collection) |
| **Credential Settings** | |
| Keypad Credential Length | 4 |
| Magnetic Stripe Credential Configurations | (Collection) |
| Proximity Credential Configurations | (Collection) |
| **Daylight Saving Settings** | |
| Daylight Savings Type | North American |
| Fall Back Month | November |
| Fall Back Sunday | First Sunday |
| Spring Forward Month | March |
| Spring Forward Sunday | Second Sunday |
| **I/O** | |
| I/O References | (Collection) |
| **Misc** | |
| Contact 1 | |
| Contact 2 | |
| Reference | |
| **PIN Settings** | |
| PIN Length | 3 |

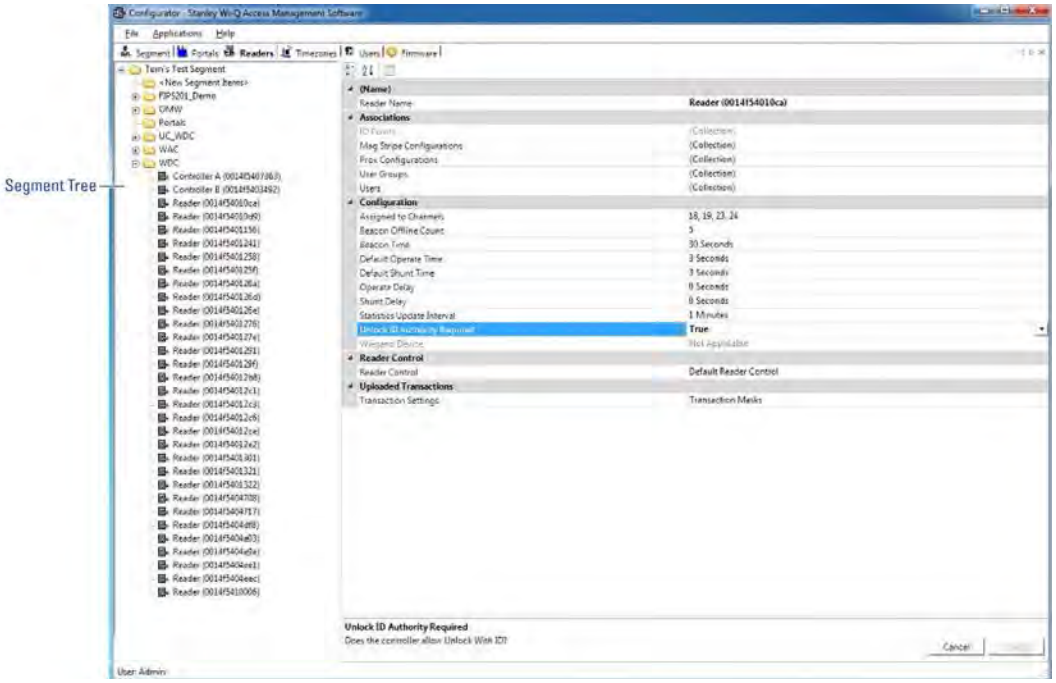
**User Fields**
Setup User Fields.

## Portals and Readers Tabs

The Portals and Readers tabs displays the Segment Tree, which is a visual representation of all Portal Gateways, Controllers, and I/O devices connected to the software. Once the devices are organized in the Segment Tree, the various paths to associate Controllers and Portals are available when you add new users to the system.

Information about creating the Segment Tree and assigning devices to the various folders in the tree is presented in Chapter 4, “Configuring Segments, Portal Gateways and Controllers” on page 62. Typically, only the Program Administrator will perform tasks using the Readers Tab, Figure 116.

Figure 116 Readers Tab



| | |
|---|---|
| **(Name)** | |
| Reader Name | **Reader (0014f54010ca)** |
| **Associations** | |
| ID Fusers | (Collection) |
| Mag Stripe Configurations | (Collection) |
| Prox Configurations | (Collection) |
| User Groups | (Collection) |
| Users | (Collection) |
| **Configuration** | |
| Assigned to Channels | 18, 19, 23, 24 |
| Beacon Offline Count | 5 |
| Beacon Time | 30 Seconds |
| Default Operate Time | 3 Seconds |
| Default Shunt Time | 3 Seconds |
| Operate Delay | 0 Seconds |
| Shunt Delay | 0 Seconds |
| Statistics Update Interval | 1 Minutes |
| Unlock ID Authority Required | **True** |
| Wiegand Device | Not Applicable |
| **Reader Control** | |
| Reader Control | Default Reader Control |
| **Uploaded Transactions** | |
| Transaction Settings | Transaction Masks |

**Unlock ID Authority Required**
Does the controller allow Unlock With ID?

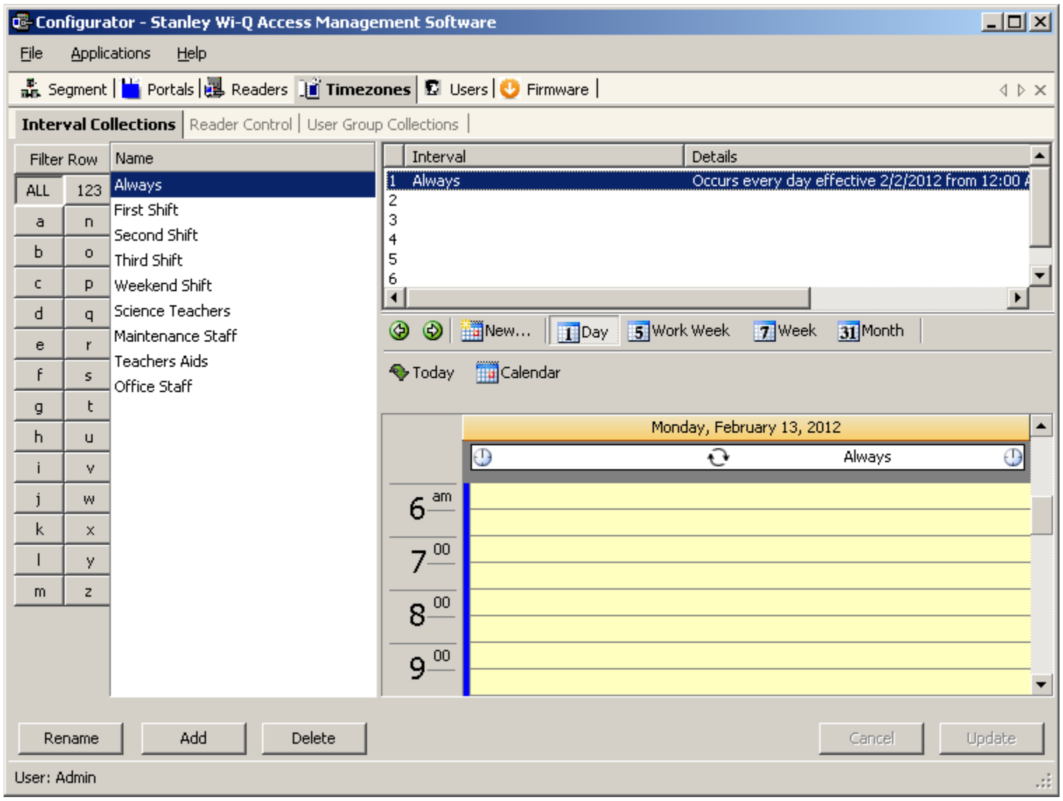
## Timezones Tab

The software automatically assigns all Controllers to a Master Timezone. Your Program Administrator can create any number of Timezone Intervals Collections and Timezone User Group Collections to modify user access within the Master Timezone. The Timezones tab displays the default Master Timezone, a calendar that operates similar to Microsoft Outlook, and any Timezone User Groups that have been created.

You can choose to display the calendar detail as one day, a work week, a full week or by the month, or click on the calendar to display a specific date.

More information about creating Timezone Intervals and Timezone Groups is presented in later in Chapter 5, “Configure AMS Software (Task 11)” on page 96.

Figure 117 Setting up the Timezones



| Name |
|---|
| Always |
| First Shift |
| Second Shift |
| Third Shift |
| Weekend Shift |
| Science Teachers |
| Maintenance Staff |
| Teachers Aids |
| Office Staff |

| | Interval | Details |
|---|---|---|
| 1 | Always | Occurs every day effective 2/2/2012 from 12:00 A |
| 2 | | |
| 3 | | |
| 4 | | |
| 5 | | |
| 6 | | |

Monday, February 13, 2012

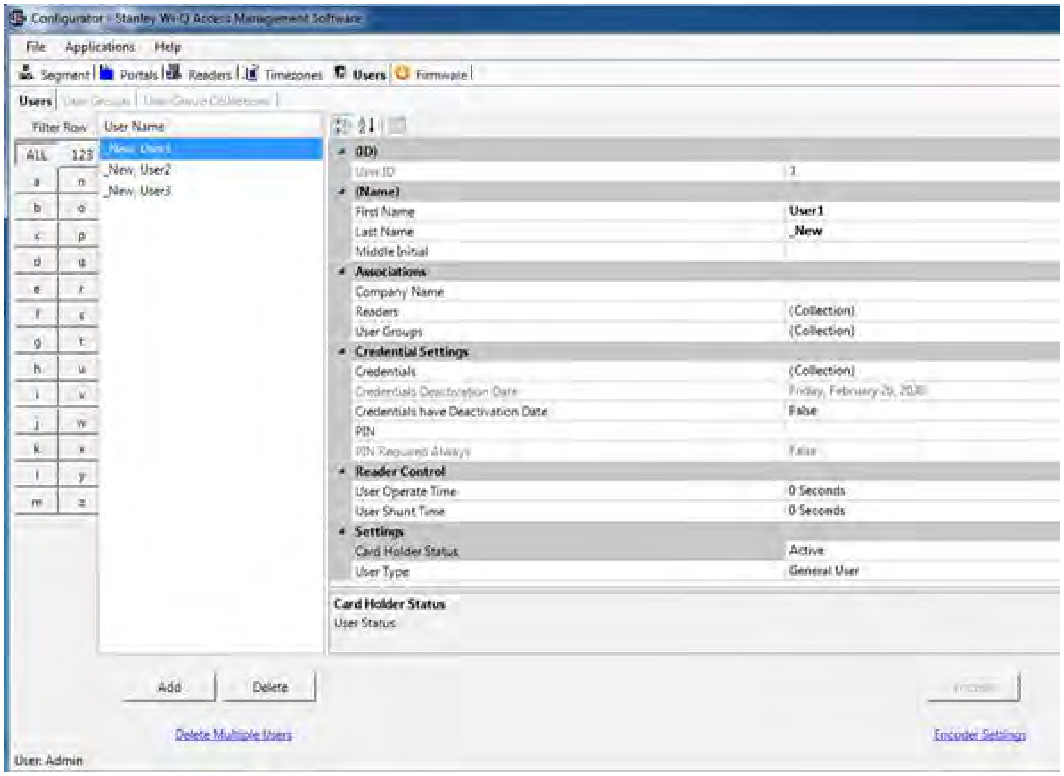
Always

User: Admin

## Users Tab

If you have been assigned responsibility to add or maintain general cardholder users of the system, your tasks will be performed in the Users Tab. All users currently in the system are displayed in the column at the left. To display a User profile, simply select their name from the list.

Figure 118 Users Tab



User Name:

- _New, User1
- _New, User2
- _New, User3

| | |
|---|---|
| **(ID)** | |
| User ID | 1 |
| **(Name)** | |
| First Name | User1 |
| Last Name | _New |
| Middle Initial | |
| **Associations** | |
| Company Name | |
| Readers | (Collection) |
| User Groups | (Collection) |
| **Credential Settings** | |
| Credentials | (Collection) |
| Credentials Deactivation Date | Friday, February 29, 2036 |
| Credentials have Deactivation Date | False |
| PIN | |
| PIN Required Always | False |
| **Reader Control** | |
| User Operate Time | 0 Seconds |
| User Shunt Time | 0 Seconds |
| **Settings** | |
| Card Holder Status | Active |
| User Type | General User |

**Card Holder Status**
User Status

More information about adding users to the system is presented in Chapter 5, “Configure AMS Software (Task 11)” on page 96.

## Firmware Tab

Firmware updates will be sent to you periodically by Stanley Technical Support. You can upload these firmware files to your database by using the System Administrator Application, and then you can send the updates to your hardware from the Configurator’s Firmware Tab. See “” on page 177.

## System Overrides

### Manager Override at Keypad Controller

When an AMS User is assigned the Manager Type, that user can change the current access level at a Controller with a keypad. Once their credential has been presented to a Controller and it has cycled, the following keys can be used to change the Controller's access level:

**Note** MC refers to Manager Credential.

| Item | WDC | WAC | Omnilock | Function |
|---|---|---|---|---|
| Manager Code | MC# | MC | MC | Momentary Unlock. |
| Restore to Normal | MC# + 0# | MC + 0000 | MC + 0 + CL | Return to normal operation from an override. |
| Toggle with ID | MC# + 1# | MC + 1111 | MC + 1 + CL | Places the device in a mode to toggle between locked and unlocked with a credential. |
| Unlock | MC# + 2# | MC + 2222 | MC + 2 + CL | Places the device in an unlocked state. |
| Unlock with ID | MC# + 3# | MC + 3333 | MC + 3 + CL | Places the device in a mode to unlock with credential. |
| Unlock with ID and PIN | MC# + 4# | MC + 4444 | MC + 4 + CL | Places the device in a mode to unlock with credential and PIN. |
| ID Required | MC# + 5# | MC + 5555 | MC + 5 + CL | Places the device in a mode where a credential is required to enter. |
| PIN Required | MC# + 6# | MC + 6666 | MC + 6 + CL | Places the device in a mode where a PIN is required to enter. |
| Facility Card | MC# + 7# | MC + 7777 | MC + 7 + CL | Places the device in a mode where all credentials with the correct facility ID have access. |
| Lockout | MC# + 8# | MC + 8888 | MC + 8 + CL | Places the device in a mode where only manager credentials have access. |
| Toggle with ID and PIN | MC# + 9# | MC + 9999 | MC + 9 + CL | Place the device in a mode to toggle between locked and unlocked with a credential and PIN. |

### Programmer Override at Keypad Reader

When an AMS User is assigned a Programmer Type, that user can present their credential and perform the following.

**Note** PC refers to Programmer Credential.

| Item | WDC | WAC | Omnilock | Function |
|---|---|---|---|---|
| Programmer Code | PC# | PC | PC | Momentary Unlock. |
| Soft Reset | PC# + 1# | PC + 1111 | PC + 1 | Soft resets device. |
| Motor Reset | PC# + 2# | PC + 2222 | PC + 2 | Resets the motor drive. |
| Comm. Processor Reset | PC# + 7# | PC + 7777 | PC + 7 | Resets the communication processor. |
| Motor Test | PC# + 8# | PC + 8888 | PC + 8 | Runs motor test. |
| Deep Reset | MC# + 9# | MC + 9999 | MC + 9 | Deep resets device. |

### Deep Reset

At times it may be necessary to perform a Deep Reset on a Controller. For example, when you install a dial up gateway modem, you must temporarily clear reader data. If the reset button inside the Controller housing is not accessible, you can use the Programmer Override to perform a Deep Reset. You can also perform a deep reset from within Configurator.

#### *To Perform a Deep Reset from within Configurator*

1 In the Configurator's Readers Tab, navigate to the desired reader using the Segment Tree.

2 In the list on the right, right-click on the reader and select Deep Reset from the drop-down list. Reader data will be cleared.

3 To bring the reader back into the software, you must perform a standard sign on procedure.

**Note** If the reader does not respond and perform the Deep Reset within five minutes, the action will be aborted.

## Segment Item Upgrades

As you continue to add users and readers to your system it may become necessary to expand your Portal and reader capacities. This is performed via the File menu in Configurator.

When you near maximum capacity in one or all of the system segment items, it's time to use one of the upgrade licenses you purchased with your system, or call Stanley Security Solutions for additional Upgrades. You can purchase system upgrades to expand the user and Controller capacity of each segment in your organization.

Each Wireless Controller begins with support for 2000 user credentials and can be upgraded to support up to 18000 Users. Upgrade licenses are available in maximum capacities of 2000, 10000, and 18000 users.

Each Portal Gateway begins with support for 16 readers and can be upgraded to support 32 and 64 wireless readers. Upgrade licenses are available in maximum capacities of up to 64 readers.

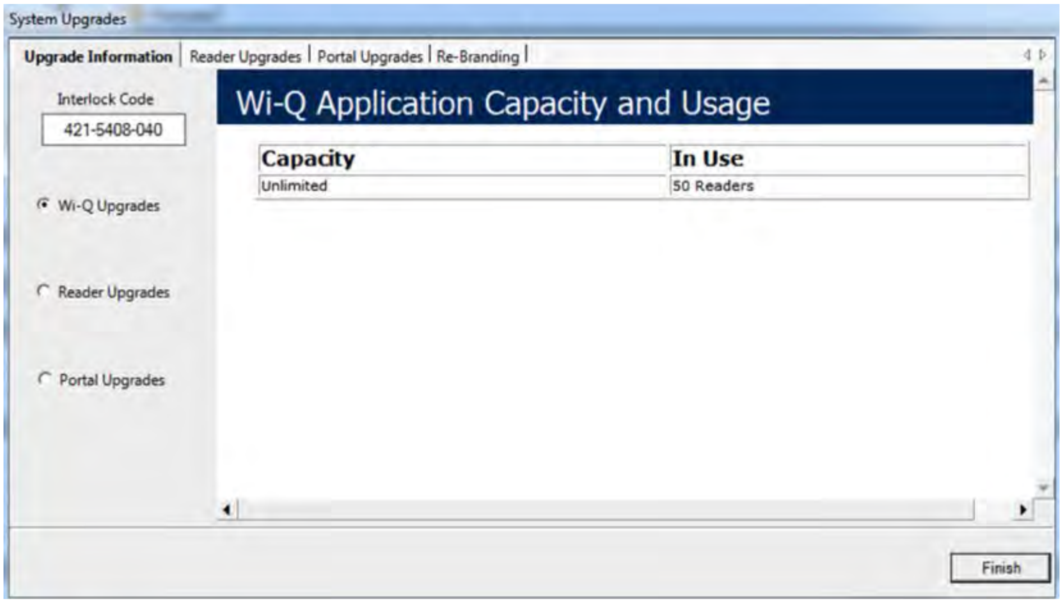
## Determine Segment Reader and Portal Capacity

An AMS user with Administrator privileges can monitor system capacity by segment from within Configurator. From here it is easy to see how many licensed upgrades are in use and how many are available.

### To view Wi-Q AMS and Omnilock Upgrade use

1. In Wi-Q AMS Configurator, Segment Tab, select the Segment you wish to review for upgrade use.
2. From the Wi-Q AMS Configurator File menu, select System Upgrades from the dropdown list. The System Upgrades window opens at the Upgrade Information Tab.

Figure 119 Upgrading your system capacity



Wi-Q Application Capacity and Usage

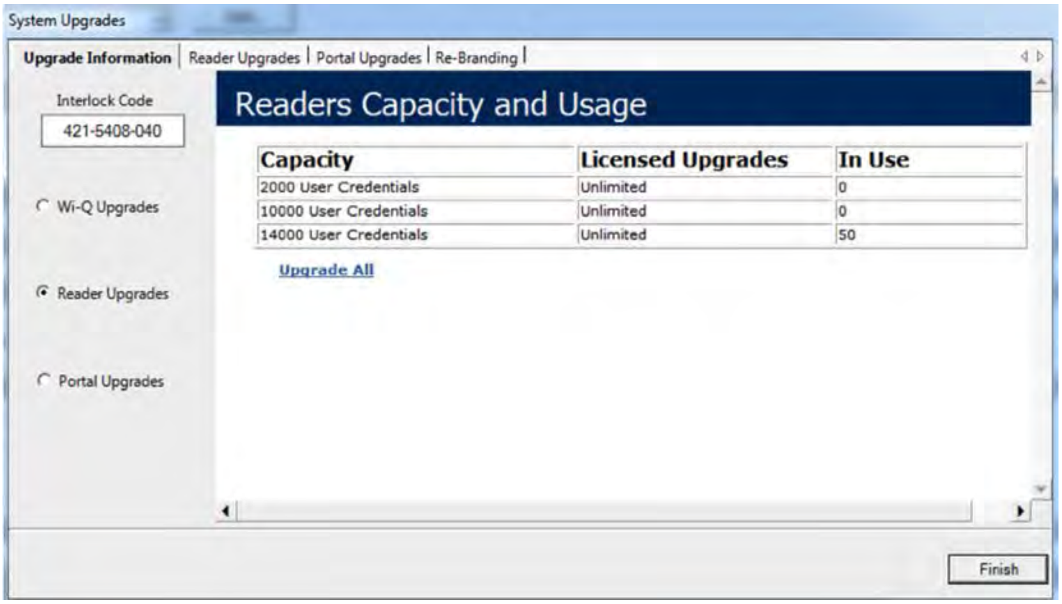
| Capacity | In Use |
|---|---|
| Unlimited | 50 Readers |

## AMS Upgrades

With the Wi-Q AMS Upgrades radio button selected on the left, the property sheet displays the current reader capacity for the segment and how many of those readers are currently in use.

Wi-Q AMS now offers free upgrades.  All capacities can be set to unlimited without a new interlock code.

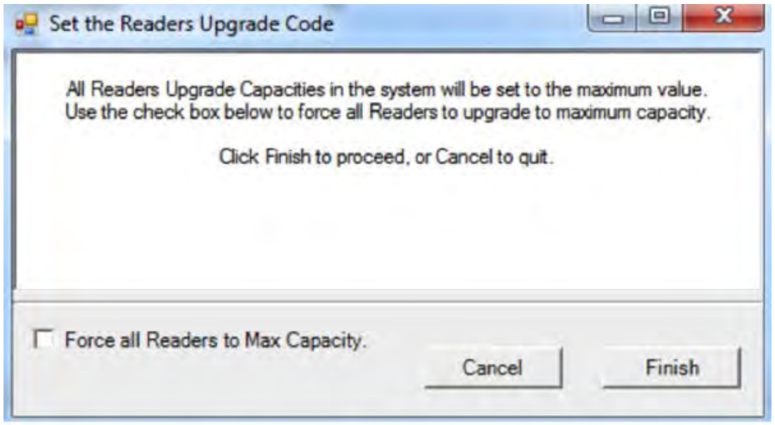
**Reader Licenses in Use —** With the Reader Upgrades radio button selected on the left, the property sheet displays the number of Licensed Upgrades in each user capacity value, and how many of those Licensed Upgrades are currently in use.



Readers Capacity and Usage

| Capacity | Licensed Upgrades | In Use |
|---|---|---|
| 2000 User Credentials | Unlimited | 0 |
| 10000 User Credentials | Unlimited | 0 |
| 14000 User Credentials | Unlimited | 50 |

Select the upgrade all link if additional user capacity is needed.


Set the Readers Upgrade Code

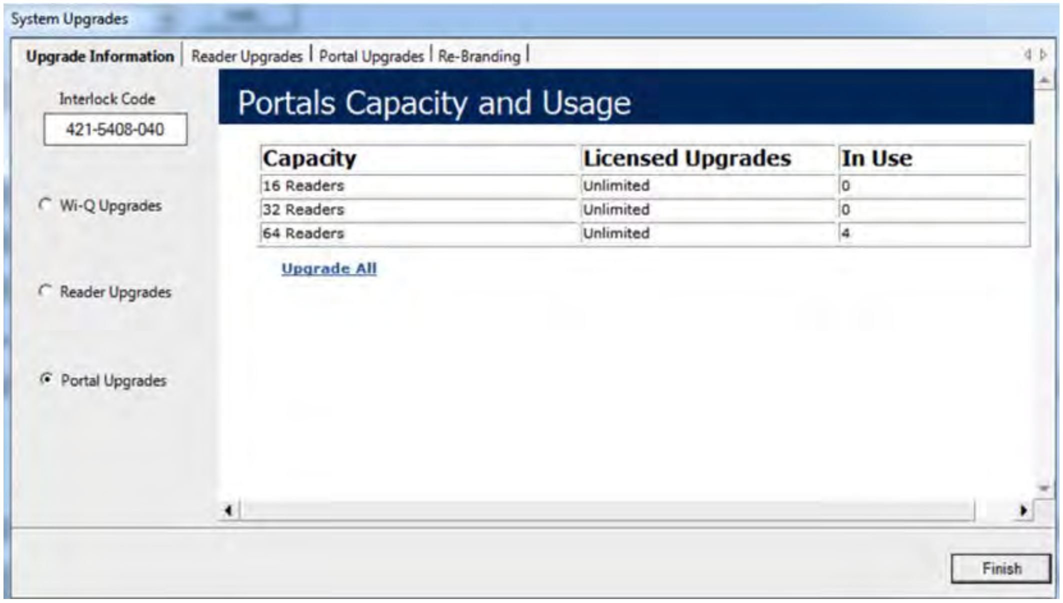
All Readers Upgrade Capacities in the system will be set to the maximum value.
Use the check box below to force all Readers to upgrade to maximum capacity.

Click Finish to proceed, or Cancel to quit.

☐ Force all Readers to Max Capacity.

Select force all readers to max capacity and click finish.

**Portal Licenses in Use —** With the Portal Upgrades radio button selected on the left, the property sheet displays the number of Licensed Upgrades in each reader capacity value, and how many of those Licensed Upgrades are currently in use.


System Upgrades

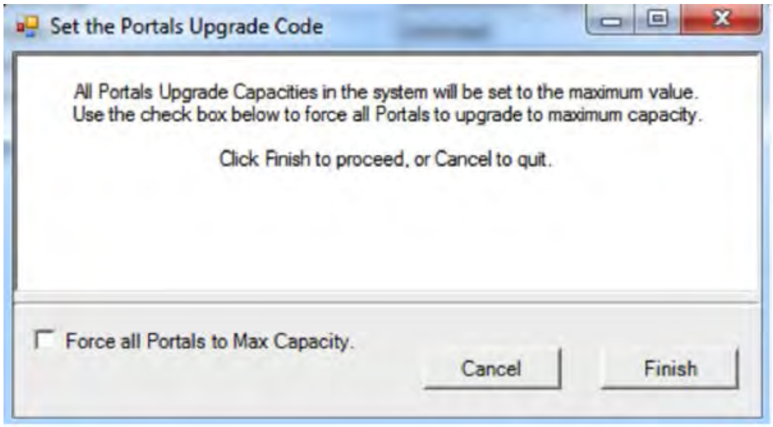
Interlock Code: 421-5408-040

○ Wi-Q Upgrades
○ Reader Upgrades
● Portal Upgrades

Portals Capacity and Usage

| Capacity | Licensed Upgrades | In Use |
|---|---|---|
| 16 Readers | Unlimited | 0 |
| 32 Readers | Unlimited | 0 |
| 64 Readers | Unlimited | 4 |

Select the upgrade all link if additional reader capacity is needed.



All Portals Upgrade Capacities in the system will be set to the maximum value.
Use the check box below to force all Portals to upgrade to maximum capacity.

Click Finish to proceed, or Cancel to quit.

□ Force all Portals to Max Capacity.

Select force all portals to max capacity and click finish.

## System Administrator

System Administrator is an application accessed inside Configurator or from the Windows Start menu. With System Administrator, you can archive and restore Portal statistics, reader statistics, and reader transactions. From here you can also import data from an existing database or comma-delimited file. You must be an AMS User with Administrator privileges to use this feature. It is a good idea to archive records on a regular basis. It will be helpful to establish a protocol and ensure that it is carried out according to plan.

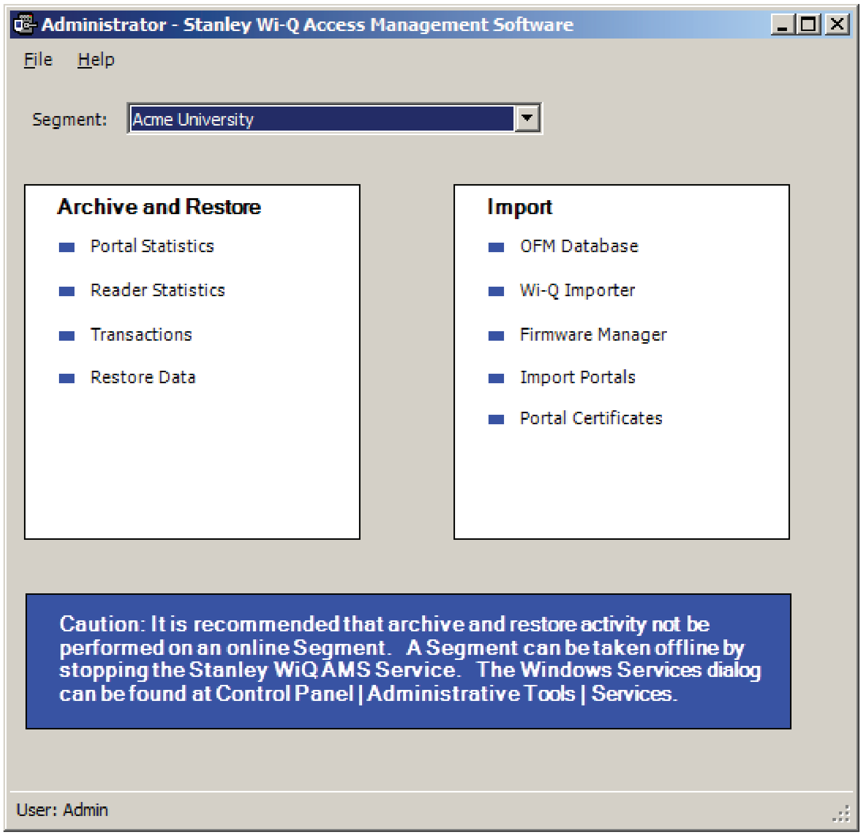
**Note** Archiving and restoring transactions and statistics is not the same as performing a full AMS database back up. Full back up and restore is performed using Microsoft SQL Server Management Studio Express (installed with AMS). Complete steps are described later in this chapter.

### Establish an Archive Protocol

An industry best practice for use of any archiving systems is to establish a protocol for who, when and how much data to archive, depending on the volume and nature of the data being archived. For security purposes, it will be important to ensure the protocol is being implemented by also establishing an audit practice.

## Using System Administrator

Figure 120 System Administrator



Segment: Acme University

Caution: It is recommended that archive and restore activity not be performed on an online Segment. A Segment can be taken offline by stopping the Stanley WiQ AMS Service. The Windows Services dialog can be found at Control Panel | Administrative Tools | Services.

User: Admin

From here you can archive and restore statistics in the AMS database, import data to AMS from the OFM Database, or import data from standard comma-delimited files such as .txt and .csv.

### Archiving Statistics in the AMS Database

It is important to maintain your database in optimum condition. On the basis of the statistics volume in your segment, you should establish a protocol to regularly archive data that are not likely to be used again. For example, each month, you may want to archive data that are three months old. When you archive records from the software using the System Administrator application, the data is removed from the database. The statistics can be fully restored to AMS in the future, if necessary.

The archive feature operates the same for Portal statistics, Reader statistics, and Transactions. The following steps illustrate how to archive Portal statistics; however, the steps are the same for each type. You can archive statistics in all devices or select a specific Portal or reader for archive.

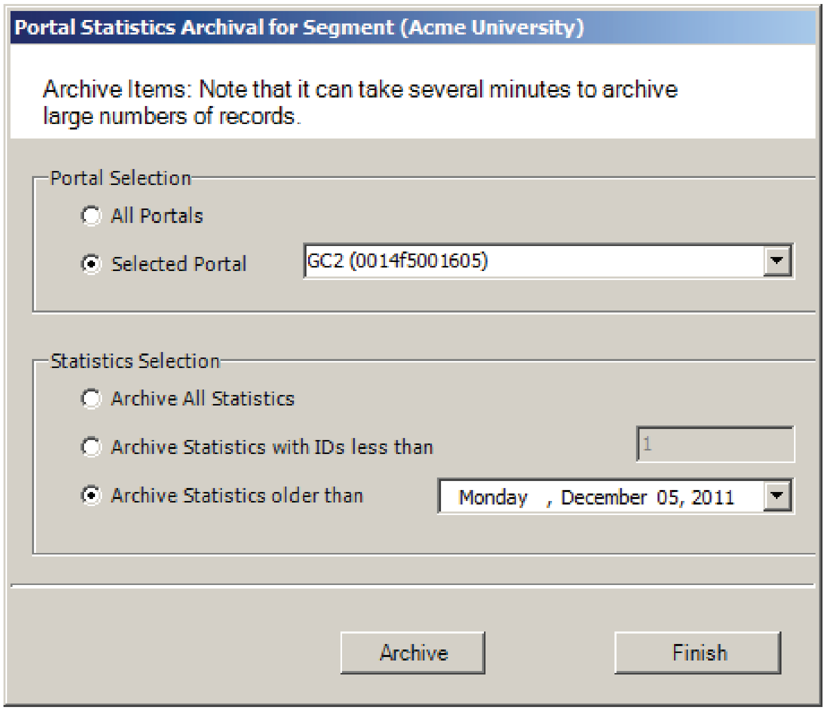
Once you've selected the Portal or reader to archive, you can also select what statistics to archive; for example, all statistics, only those statistics greater than a specific ID, or specify a range of statistics older than a specific date.

### *To Archive Statistics*

1 In the System Administrator application, select the segment for which you wish to archive statistics.

2 In the main window, under Archive and Restore, select a Statistics type, such as Portal Statistics.

Figure 121 Portal Statistics Archival for Segment



Portal Statistics Archival for Segment (Acme University)

Archive Items: Note that it can take several minutes to archive large numbers of records.

Portal Selection

○ All Portals

● Selected Portal GC2 (0014f5001605)

Statistics Selection

○ Archive All Statistics

○ Archive Statistics with IDs less than 1

● Archive Statistics older than Monday , December 05, 2011

3 In the Portal Selection box, select one of the following:

- All Portals — All Portals' data will be archived.
- Selected Portal — Choose a Portal ID from the drop-down list. Data from only that Portal will be archived.

4 In the Statistics Selection box, select one of the following:

- Archive All Statistics — All statistics in the database will be archived.
- Archive Statistics with IDs less than — Define an ID number. Only statistics with IDs less than the defined number will be affected.
- Archive Statistics older than  — Select a date. Only data older than the date selected will be archived.

5 When you have selected the appropriate options, click the Archive button and click Yes if you wish to continue with the archive.

6 In the Windows browser, navigate to a folder or create a new one in which to archive the file. You should create a filename that will be meaningful to your segment (for example, all_Portals, or siteA_Portals). These files will be accessible under this location should you wish to restore them at a later date.

7 Click OK. The system will display the status of the archive activity as it proceeds.

8 Click Finish to exit Portal Statistics Archive.

## Restoring Data to the Database

You can restore data that have been archived by System Administrator back into the database. Once this is done, you will be able to view them in Configurator and its related applications.

### *To Restore Data to AMS*

1 From the Configurator Segment Tab, select the segment for which you wish to archive statistics.

2 From the Applications menu on the Configurator menu bar, select System Administrator. The Systems Administrator window opens.

3 Select the Segment you wish to work with. From the left window pane, select Restore Data. The Windows browser window opens.

4 Select the file you wish to restore to AMS, then click Open.

5 The system reports that the records will be restored to the Segment. Click Yes to continue. The system will display the status of the archive activity as it proceeds.

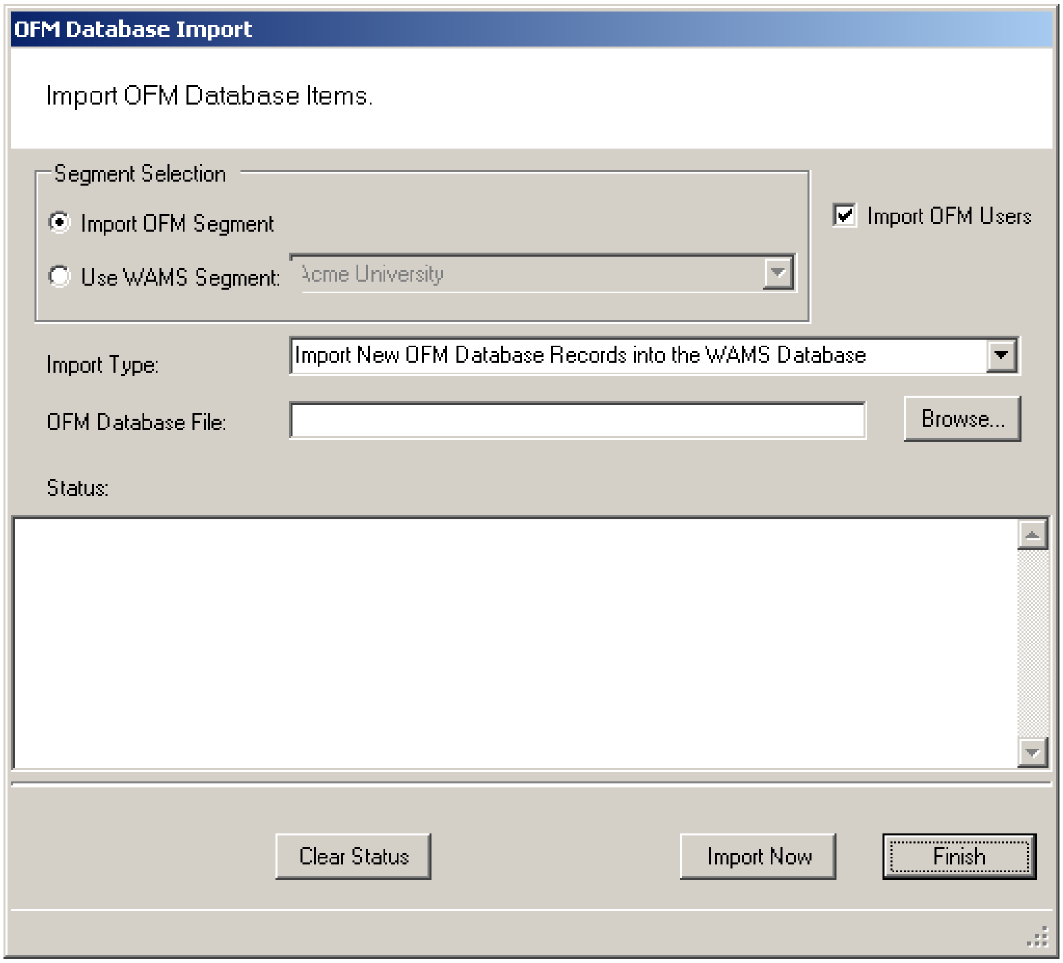
## Importing Data from a Legacy OFM Database

You can import an entirely new segment into the software from a legacy OFM database, or you can import all or some elements of data into an existing segment and overwrite any data with the latest data in the OFM. When you import an entire segment from an OFM database, AMS creates a segment with the segment name of the old database.

### *To Import Data to AMS*

1. From the Applications menu on the Configurator menu bar, select System Administrator. The System Administrator window opens.
2. From the right window pane, select OFM Database. The Windows browser window opens.

Figure 122 OFM Database Import


OFM Database Import

Import OFM Database Items.

Segment Selection

● Import OFM Segment

○ Use WAMS Segment: Acme University

☑ Import OFM Users

Import Type: Import New OFM Database Records into the WAMS Database

OFM Database File:

Status:

3 In the Segment Selection box, select one of the two options:

- Import OFM Segment — This option imports a new segment in its entirety and automatically gives it the name of the existing Segment in the OFM Database.
- Use Segment — This option activates the drop-down list. Select the Segment into which you wish to import data. It will import any new data and update any existing records with the same ID based on the import type.

4 Select the Import OFM Users option if you want to include OFM Database existing Users and User Groups.

5 From the Import Type dropdown menu, select the type of import you wish to perform:

- Import New OFM Records into the Database — This will import only new records.
- Merge New and Changed OFM Data into the Database — This will import all data and add or update any records that are new since the last import.

6 Select Browse to find the OFM Database File.

7 Select Import Now. The data will begin to transfer and you will see the records scroll through the Status window. This should take only a few minutes, depending on the size of the data being imported.

### Import Data from a Standard Comma-Delimited File

You can also create a comma-delimited .txt or .csv file containing Names, Credentials and other AMS information and import the data directly to the database, including any of the following data:

- Last Name
- First Name
- Middle Initial
- Proximity Card Credential
- Proximity Card Type
- Magnetic Stripe Card Credential
- Keypad Credential

In addition, you can include data for any user fields created for the segment selected for import.

### AMS Importer imports files in a few easy steps:

- Create the data file in the appropriate program, such as Microsoft Word, Excel, or other text-based program and save it as a .txt or .csv format.

- Prepare the Wi-Q AMS Import Utility to accept the file.
- Import the data.
- Send the Data to the database.

In the Import Utility, you can view the data as it imports into the window and make any corrections to the file or column headers until you are satisfied with the import before you actually send it to the database.

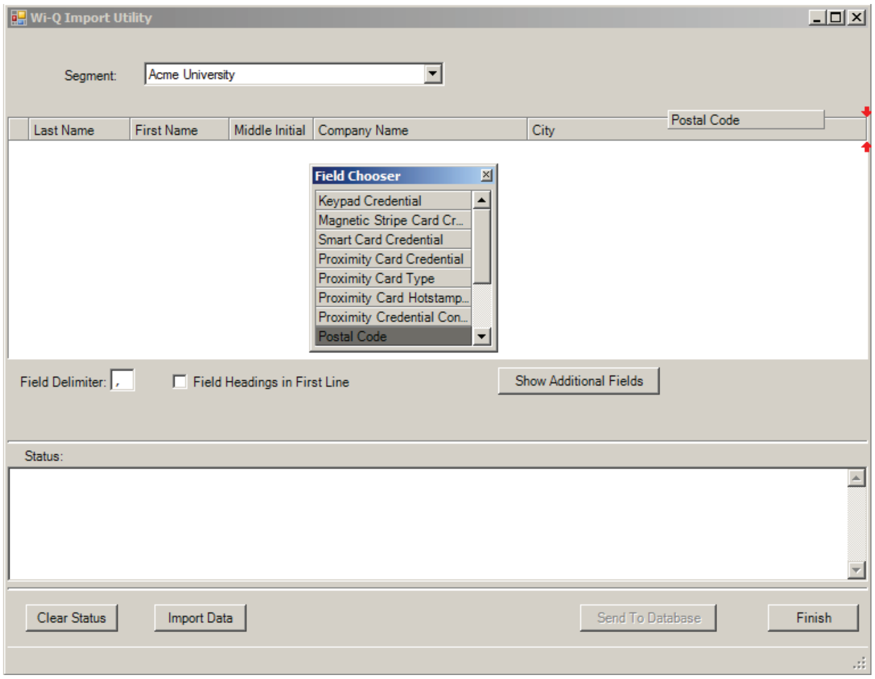
Detailed instructions are presented in the next few sections.

### To prepare Wi-Q AMS Import Utility

1 From the Applications menu on the Configurator menu bar, select System Administrator. The System Administrator window opens.

2 From the right window pane, select Wi-Q (or Omnilock) Importer. The Import Utility opens.

Figure 123 Import Utility



3 Use the cursor to drag the column headers into any order you wish.

4 If you wish to import additional data into user fields associated with the segment, click Show Additional Fields to display the Field Chooser and double-click or drag to add them to the header.

5 Enter the appropriate Field Delimiter for the import file, the default is a comma.

6 If you have field headings in the first line of your data file, click the Field Heading in First Line check box.

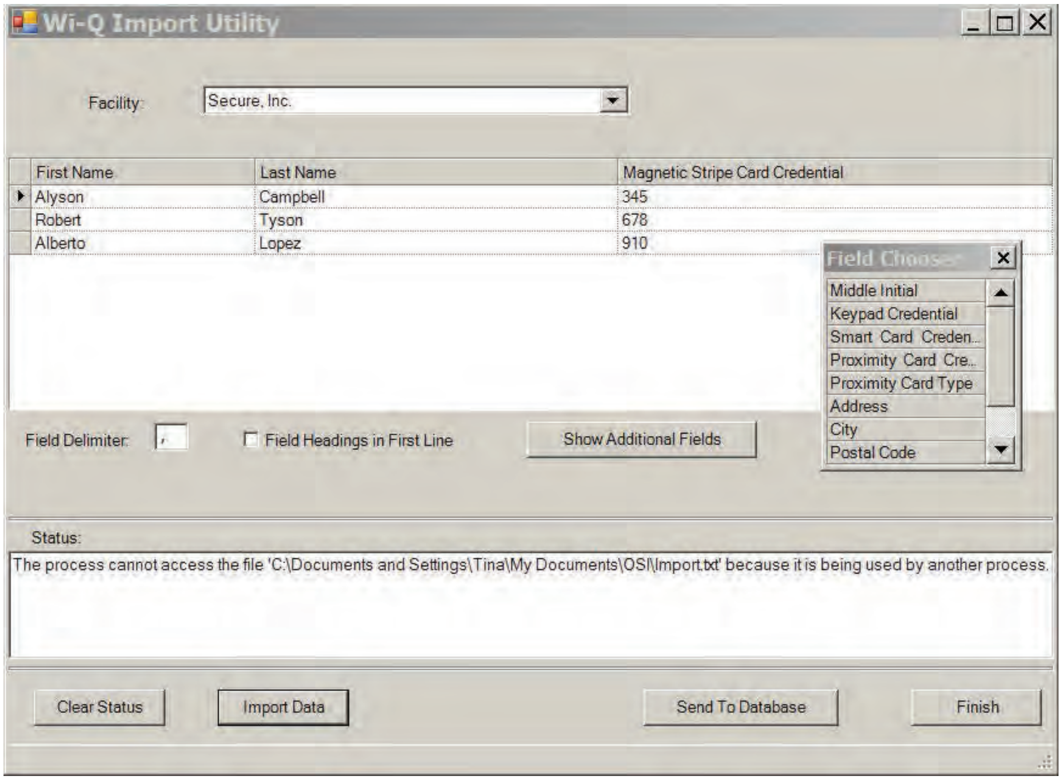
### To import the data

1 Once all column headers are in the order you wish, click Import Data.

2 Navigate to the location of the data file you created and click Open.

3 The Data appears under the appropriate column headers in the upper window. If the file is large, you can watch the progress in the Status box on the bottom of the window.

Figure 124 Using the Import Utility



Facility: Secure, Inc.

| First Name | Last Name | Magnetic Stripe Card Credential |
|---|---|---|
| Alyson | Campbell | 345 |
| Robert | Tyson | 678 |
| Alberto | Lopez | 910 |

Field Delimiter: ,

☐ Field Headings in First Line

Status:

The process cannot access the file 'C:\Documents and Settings\Tina\My Documents\OSI\Import.txt' because it is being used by another process.

4 Review the data import. Scroll the window to ensure the data has imported in the appropriate column headers. If not, you can rearrange the column headers and import the file again. You can do this as many times as you need to ensure you will get a good import.

5 Once you are satisfied that the data has imported as intended, click Send to Database. The data will now appear in the appropriate fields throughout AMS.

## Backing Up and Restoring Your AMS Database

Full backup and restore functions are performed outside of AMS using Microsoft SQL Server Management Studio Express (installed with the software). You should plan to perform this function on a regular basis. You can also use this program to move the database to a different computer.

***WARNING: This operation should be performed only by an IT professional who is designated as an AMS User with Admin or Programmer privileges.***

### Backing Up the Database

Perform the following steps to back up the database.

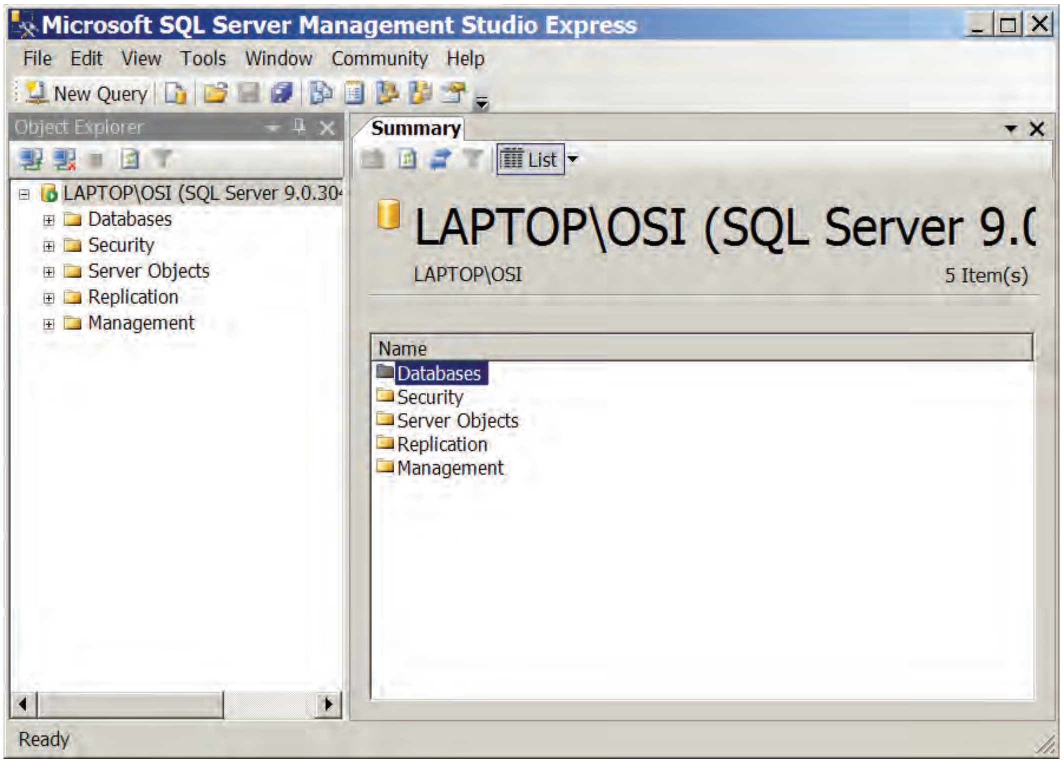
1 Exit AMS.

2 From the Windows Start menu, select Programs>Microsoft SQL Server Management Studio Express. The connect to Server dialog box opens.

3 Enter the Server type, Server name, and choose your Authentication type. Then, click Connect.

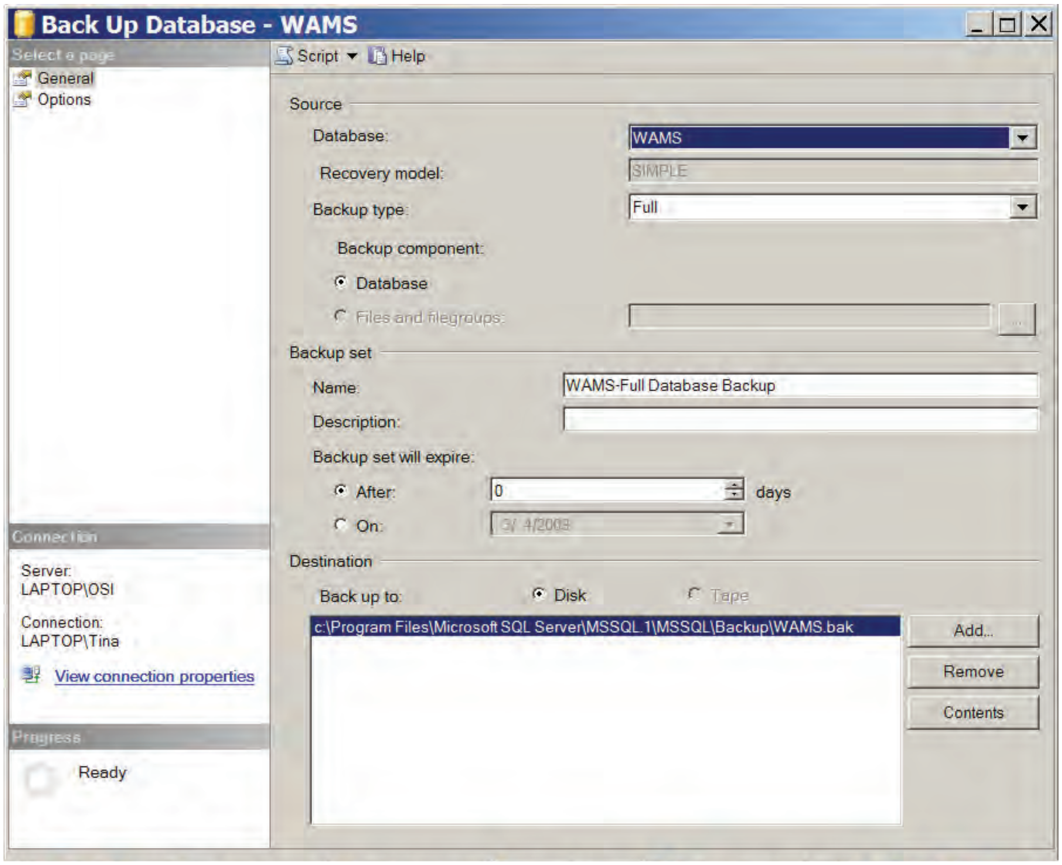
4 The program opens at the default database location.

Figure 125 Default database display in SQL Server



5 Double-click on databases, then right-click on the folder and select tasks>Backup. The backup database dialog box opens.

Figure 126 Backup Database



Source

Database: WAMS

Recovery model: SIMPLE

Backup type: Full

Backup component:

● Database

○ Files and filegroups:

Backup set

Name: WAMS-Full Database Backup

Description:

Backup set will expire:

● After: 0 days

○ On: 3/ 4/2009

Destination

Back up to: ● Disk ○ Tape

c:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Backup\WAMS.bak

Server:
LAPTOP\OSI

Connection:
LAPTOP\Tina

View connection properties

Ready

6 Define a Backup Type (full or differential) and add a description of the backup (optional).

7 The default destination displays. You can change the destination, if needed, for example if you wish to move the database to a new location on a different computer.

8 Click OK. The backup progresses and the system reports when the backup is complete.

### To Restore the database

1 Exit AMS.

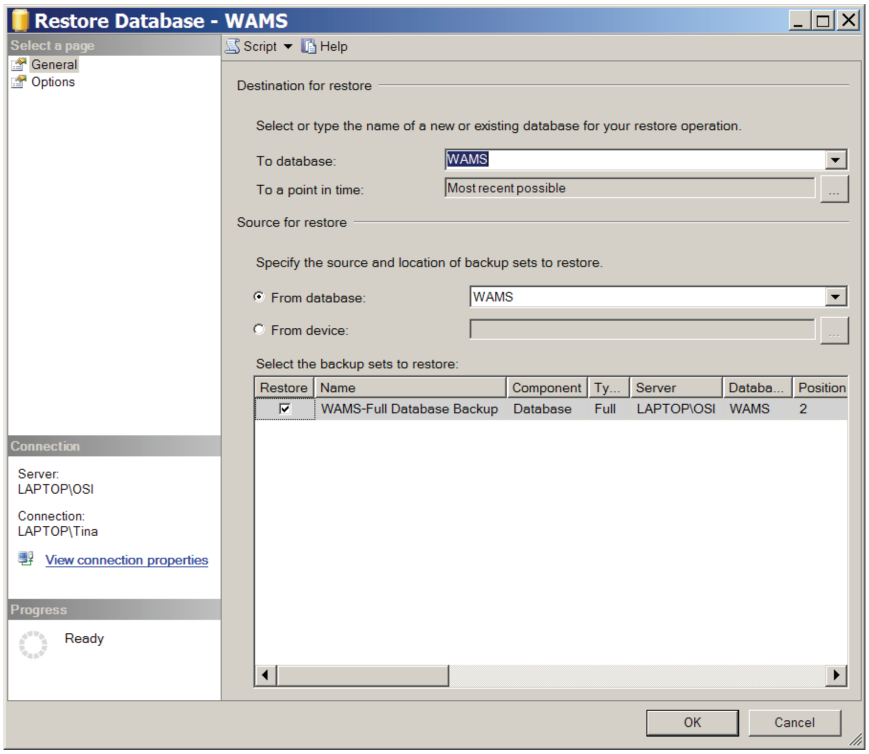
2 From the Windows Start menu, select Programs>Microsoft SQL Server Management Studio Express. The connect to Server dialog box opens.

3 Enter the Server type, Server name, and choose your Authentication type. Then, click Connect.

4 The program opens at the database location.

5 Double-click on databases, then right-click on the folder and select tasks>Restore>database. The restore database dialog box opens.

Figure 127 Restore Database



Restore Database - WAMS

Destination for restore

Select or type the name of a new or existing database for your restore operation.

To database: WAMS

To a point in time: Most recent possible

Source for restore

Specify the source and location of backup sets to restore.

● From database: WAMS

○ From device:

Select the backup sets to restore:

| Restore | Name | Component | Ty... | Server | Databa... | Position |
|---|---|---|---|---|---|---|
| ☑ | WAMS-Full Database Backup | Database | Full | LAPTOP\OSI | WAMS | 2 |

Connection

Server:
LAPTOP\OSI

Connection:
LAPTOP\Tina

Progress

Ready

6 The location defaults to the original location. You can specify a different location, for example, if you wish to more the database to a different computer.

7 Specify the source from which to restore and select a backup set to restore.

8 Select the backup set you wish to restore from the available list.

9 Click OK. The restore progresses and the system reports when the restore is complete.

## Firmware Updates

Firmware updates will be sent to you periodically by Stanley Technical Support. You can upload these firmware files to your database by using the System Administrator Application, and then you can send the updates to your hardware from the Configurator's Firmware Tab. This section will guide you through the firmware update process.

### Firmware File Types

Every Controller has two firmware files:

- Application File: Software that provides the access control decision-making functionality on a Controller
- Bootloader File: Software that executes the reprogramming session on the Controller

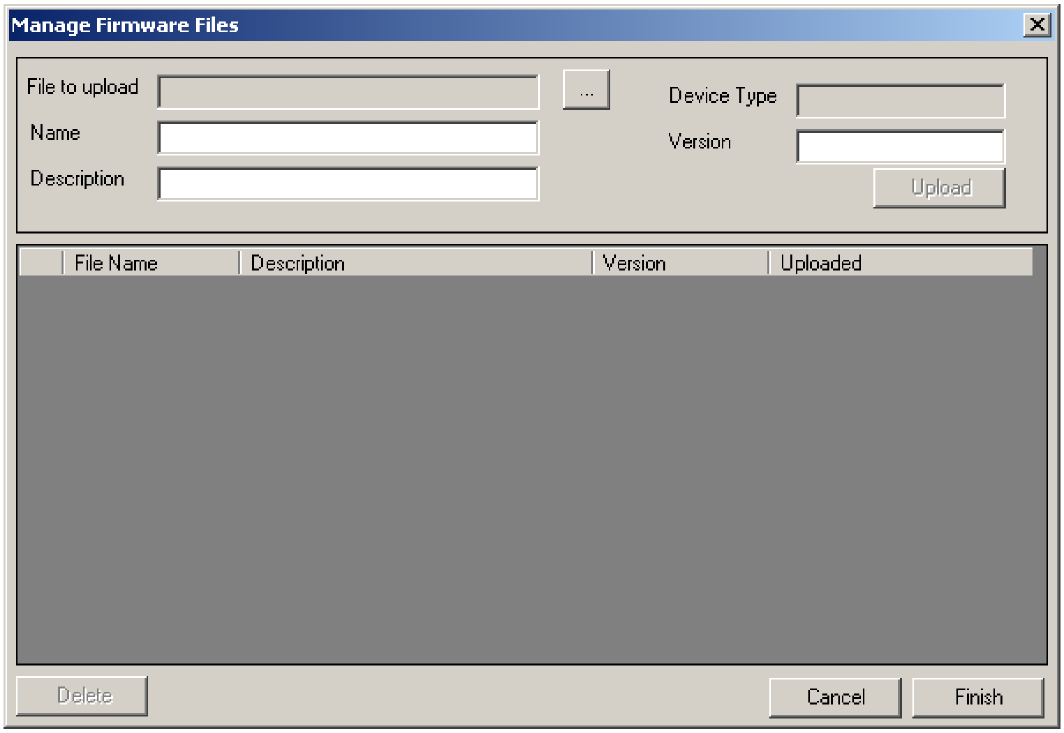
The application file is what is typically reprogrammed by the Stanley Team, but it is possible that the bootloader file will require reprogramming as well. Controller firmware files will always have a "binhe" file extension.

For Portal Gateways, only one file is required for reprogramming, and the file name begins with the version number and ends with "image.bin.gzhe."

### Uploading Firmware Files

1 In the System Administrator application, choose Firmware Manager from the Import list on the right. The Manage Firmware Files dialog box opens.

Figure 128 Manage Firmware Files



2 Click on the ellipsis button next to the File to upload field. Browse to your Portal gateway or Controller file(s). Once you've located your file, click Open.

3 Provide a unique name and description of the firmware file. If you are uploading a Controller firmware file, it is recommended that you build either "Boot" or "Application" into your description name, depending on the file type.

4 Click Upload. The firmware file will be added to the list at the bottom of the screen and added to your database.

To avoid confusion between updates, it is recommended that you only keep the latest firmware files in your list. To remove older files, select the file(s) you wish to delete and click on Delete.

5 Click Finish once all of your files are uploaded.

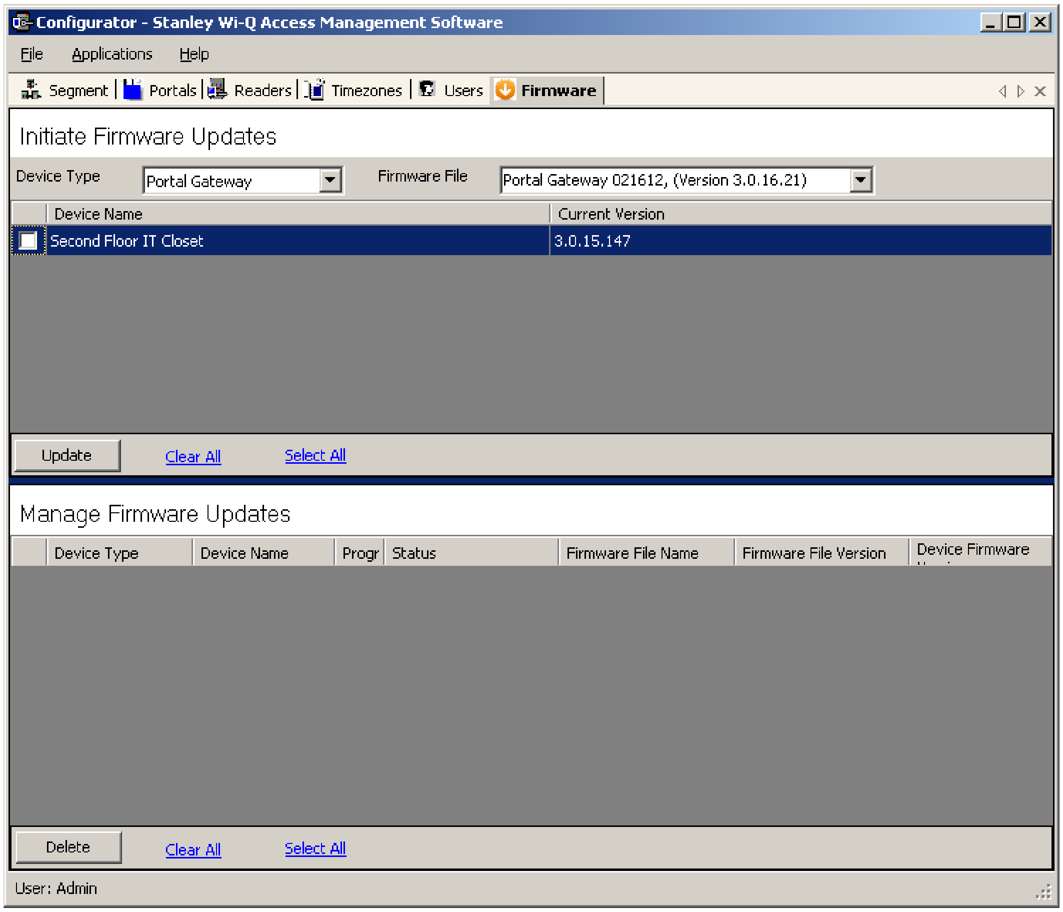
You are now ready to send the updates to your hardware.

## Firmware Reprogram

Perform the following steps to send firmware updates to your hardware.

1 If not already open, launch the Configurator application and click on the Firmware tab.

Figure 129 Configurator Firmware Tab



Initiate Firmware Updates

Device Type: Portal Gateway

Firmware File: Portal Gateway 021612, (Version 3.0.16.21)

| | Device Name | Current Version |
|---|---|---|
| □ | Second Floor IT Closet | 3.0.15.147 |

Manage Firmware Updates

| | Device Type | Device Name | Progr | Status | Firmware File Name | Firmware File Version | Device Firmware ... |
|---|---|---|---|---|---|---|---|

User: Admin

2 Choose your device type from the dropdown menu, and choose the appropriate firmware file.

**Note** If you are reprogramming both the Bootloader and Application files on a Controller, you must update the Bootloader file first.

3 Check the boxes next to the devices that need updating. You can click Select All or Clear All as needed.

4 Once you've made your selections, press Update.

5 The devices will be added to the Manage Firmware Updates queue below, where you can view the download progress and status.

# Transactions Monitor

Each time a user accesses the system, the software collects a transaction from the Controller/Portal Gateway network. Once the system is signed on and users begin accessing the system, transactions begin including any alarm activity. You can monitor all this activity in Transactions. Access Transactions via the Windows Start menu.

### To Launch Transactions

1 Select Start>All Programs> Stanley Security Solutions >Stanley Wi-Q AMS> Transactions.

2 Enter your Login and Password. Transactions opens at the Transactions Tab.

3 From here you can view all transaction and alarm activity for the segment you select.

**Note:** If you have been assigned the Manager or Administrator User Type, you can launch Transactions from the Applications menu in Configurator.

## Transactions Overview

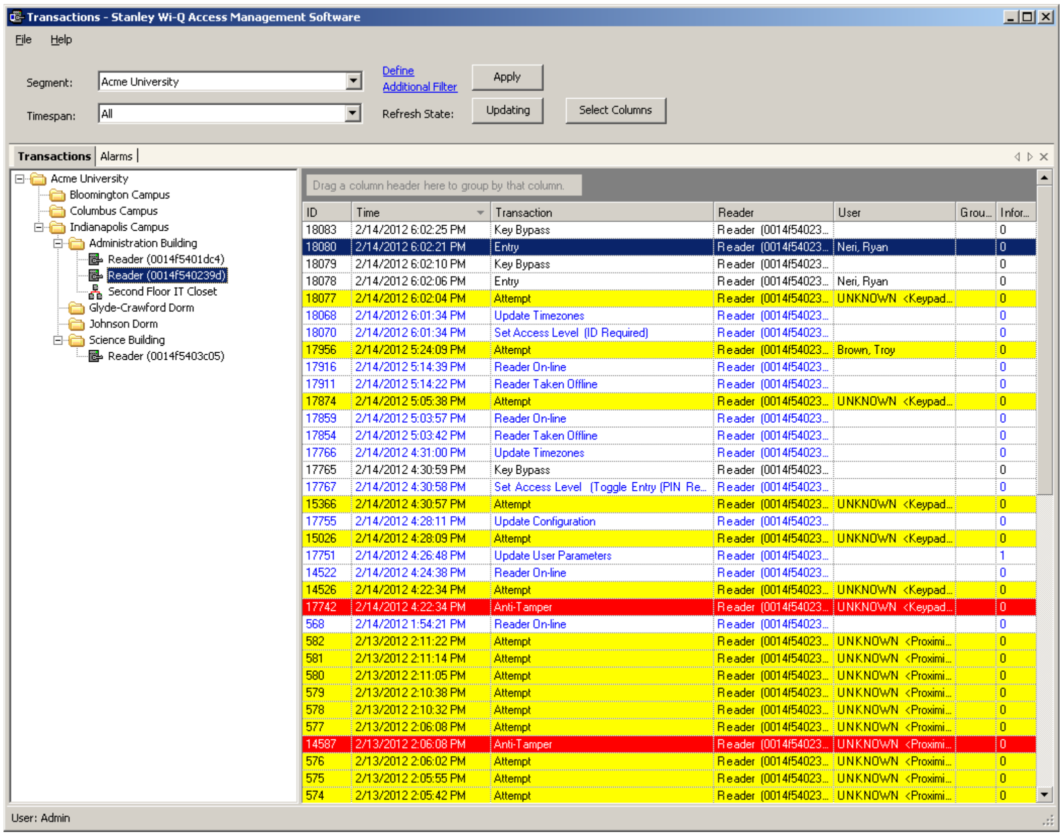
As activity takes place throughout the segment, AMS tracks each event as a transaction. The most obvious use of Transactions is to recognize and investigate when security has been compromised. You can immediately locate the source of an alarm and take the action necessary to respond according to your segment policy and procedure.

AMS gives each transaction in the database a unique ID, records the time and type of transaction, the Controller where the transaction occurred and the User ID and Group name associated with the transaction. You can monitor all this activity, real time, from the Transactions application. The transactions can be organized and sorted according to how you want to use the data. In addition, you can temporarily pause data updating if you need to review a transaction in more detail.

## Transactions Tab

You can view all transactions as they occur in the Transactions Tab. Alarm transactions such as Forced Entry or Anti Tamper display in red. Access requests "attempted but not allowed" displays in yellow. Successful access requests display in black on a white background.

Figure 130 Transactions


Transactions - Stanley Wi-Q Access Management Software
File
Help
Define
Additional Filter
Apply
Updating
Select Columns
Transactions
Alarms
Drag a column header here to group by that column.

Segment: Acme University

Timespan: All

Refresh State: Updating

- Acme University
  - Bloomington Campus
  - Columbus Campus
  - Indianapolis Campus
    - Administration Building
      - Reader (0014f5401dc4)
      - Reader (0014f540239d)
      - Second Floor IT Closet
    - Glyde-Crawford Dorm
    - Johnson Dorm
    - Science Building
      - Reader (0014f5403c05)

| ID | Time | Transaction | Reader | User | Grou... | Infor... |
|---|---|---|---|---|---|---|
| 18083 | 2/14/2012 6:02:25 PM | Key Bypass | Reader (0014f54023... | | | 0 |
| 18080 | 2/14/2012 6:02:21 PM | Entry | Reader (0014f54023... | Neri, Ryan | | 0 |
| 18079 | 2/14/2012 6:02:10 PM | Key Bypass | Reader (0014f54023... | | | 0 |
| 18078 | 2/14/2012 6:02:06 PM | Entry | Reader (0014f54023... | Neri, Ryan | | 0 |
| 18077 | 2/14/2012 6:02:04 PM | Attempt | Reader (0014f54023... | UNKNOWN <Keypad... | | 0 |
| 18068 | 2/14/2012 6:01:34 PM | Update Timezones | Reader (0014f54023... | | | 0 |
| 18070 | 2/14/2012 6:01:34 PM | Set Access Level (ID Required) | Reader (0014f54023... | | | 0 |
| 17956 | 2/14/2012 5:24:09 PM | Attempt | Reader (0014f54023... | Brown, Troy | | 0 |
| 17916 | 2/14/2012 5:14:39 PM | Reader On-line | Reader (0014f54023... | | | 0 |
| 17911 | 2/14/2012 5:14:22 PM | Reader Taken Offline | Reader (0014f54023... | | | 0 |
| 17874 | 2/14/2012 5:05:38 PM | Attempt | Reader (0014f54023... | UNKNOWN <Keypad... | | 0 |
| 17859 | 2/14/2012 5:03:57 PM | Reader On-line | Reader (0014f54023... | | | 0 |
| 17854 | 2/14/2012 5:03:42 PM | Reader Taken Offline | Reader (0014f54023... | | | 0 |
| 17766 | 2/14/2012 4:31:00 PM | Update Timezones | Reader (0014f54023... | | | 0 |
| 17765 | 2/14/2012 4:30:59 PM | Key Bypass | Reader (0014f54023... | | | 0 |
| 17767 | 2/14/2012 4:30:58 PM | Set Access Level (Toggle Entry (PIN Re... | Reader (0014f54023... | | | 0 |
| 15366 | 2/14/2012 4:30:57 PM | Attempt | Reader (0014f54023... | UNKNOWN <Keypad... | | 0 |
| 17755 | 2/14/2012 4:28:11 PM | Update Configuration | Reader (0014f54023... | | | 0 |
| 15026 | 2/14/2012 4:28:09 PM | Attempt | Reader (0014f54023... | UNKNOWN <Keypad... | | 0 |
| 17751 | 2/14/2012 4:26:48 PM | Update User Parameters | Reader (0014f54023... | | | 1 |
| 14522 | 2/14/2012 4:24:38 PM | Reader On-line | Reader (0014f54023... | | | 0 |
| 14526 | 2/14/2012 4:22:34 PM | Attempt | Reader (0014f54023... | UNKNOWN <Keypad... | | 0 |
| 17742 | 2/14/2012 4:22:34 PM | Anti-Tamper | Reader (0014f54023... | UNKNOWN <Keypad... | | 0 |
| 568 | 2/14/2012 1:54:21 PM | Reader On-line | Reader (0014f54023... | | | 0 |
| 582 | 2/13/2012 2:11:22 PM | Attempt | Reader (0014f54023... | UNKNOWN <Proximi... | | 0 |
| 581 | 2/13/2012 2:11:14 PM | Attempt | Reader (0014f54023... | UNKNOWN <Proximi... | | 0 |
| 580 | 2/13/2012 2:11:05 PM | Attempt | Reader (0014f54023... | UNKNOWN <Proximi... | | 0 |
| 579 | 2/13/2012 2:10:38 PM | Attempt | Reader (0014f54023... | UNKNOWN <Proximi... | | 0 |
| 578 | 2/13/2012 2:10:32 PM | Attempt | Reader (0014f54023... | UNKNOWN <Proximi... | | 0 |
| 577 | 2/13/2012 2:06:08 PM | Attempt | Reader (0014f54023... | UNKNOWN <Proximi... | | 0 |
| 14587 | 2/13/2012 2:06:08 PM | Anti-Tamper | Reader (0014f54023... | UNKNOWN <Proximi... | | 0 |
| 576 | 2/13/2012 2:06:02 PM | Attempt | Reader (0014f54023... | UNKNOWN <Proximi... | | 0 |
| 575 | 2/13/2012 2:05:55 PM | Attempt | Reader (0014f54023... | UNKNOWN <Proximi... | | 0 |
| 574 | 2/13/2012 2:05:42 PM | Attempt | Reader (0014f54023... | UNKNOWN <Proximi... | | 0 |

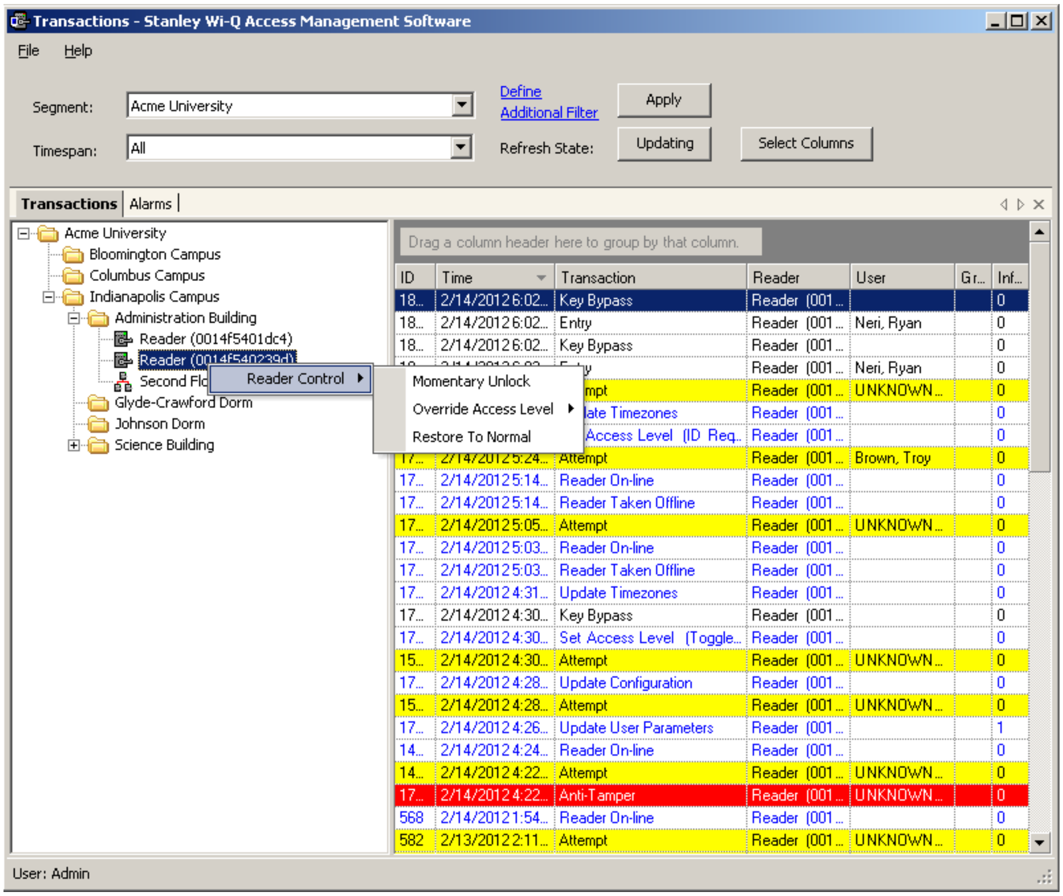
User: Admin

System transactions such as changing an access level or clearing an alarm display in blue on a white background. To review and respond to alarms, select the Alarms Tab.

### *Reader and Portal Controls*

You can access reader and Portal controls from inside the Transactions tab. From here you can override access levels of readers to unlock or lockout one or a whole related group of readers. To use this feature, simply right click on the Portal or reader and select an option.

Figure 131  Accessing Portals and Readers in the Transactions tab



Segment: Acme University

Timespan: All

Refresh State: Updating

| ID | Time | Transaction | Reader | User | Gr... | Inf... |
|---|---|---|---|---|---|---|
| 18... | 2/14/2012 6:02... | Key Bypass | Reader (001 ... | | | 0 |
| 18... | 2/14/2012 6:02... | Entry | Reader (001 ... | Neri, Ryan | | 0 |
| 18... | 2/14/2012 6:02... | Key Bypass | Reader (001 ... | | | 0 |
| | | y | Reader (001 ... | Neri, Ryan | | 0 |
| | | mpt | Reader (001 ... | UNKNOWN ... | | 0 |
| | | late Timezones | Reader (001 ... | | | 0 |
| | | Access Level (ID Req.. | Reader (001 ... | | | 0 |
| 17... | 2/14/2012 5:24... | Attempt | Reader (001 ... | Brown, Troy | | 0 |
| 17... | 2/14/2012 5:14... | Reader On-line | Reader (001 ... | | | 0 |
| 17... | 2/14/2012 5:14... | Reader Taken Offline | Reader (001 ... | | | 0 |
| 17... | 2/14/2012 5:05... | Attempt | Reader (001 ... | UNKNOWN ... | | 0 |
| 17... | 2/14/2012 5:03... | Reader On-line | Reader (001 ... | | | 0 |
| 17... | 2/14/2012 5:03... | Reader Taken Offline | Reader (001 ... | | | 0 |
| 17... | 2/14/2012 4:31... | Update Timezones | Reader (001 ... | | | 0 |
| 17... | 2/14/2012 4:30... | Key Bypass | Reader (001 ... | | | 0 |
| 17... | 2/14/2012 4:30... | Set Access Level (Toggle... | Reader (001 ... | | | 0 |
| 15... | 2/14/2012 4:30... | Attempt | Reader (001 ... | UNKNOWN ... | | 0 |
| 17... | 2/14/2012 4:28... | Update Configuration | Reader (001 ... | | | 0 |
| 15... | 2/14/2012 4:28... | Attempt | Reader (001 ... | UNKNOWN ... | | 0 |
| 17... | 2/14/2012 4:26... | Update User Parameters | Reader (001 ... | | | 1 |
| 14... | 2/14/2012 4:24... | Reader On-line | Reader (001 ... | | | 0 |
| 14... | 2/14/2012 4:22... | Attempt | Reader (001 ... | UNKNOWN ... | | 0 |
| 17... | 2/14/2012 4:22... | Anti-Tamper | Reader (001 ... | UNKNOWN ... | | 0 |
| 568 | 2/14/2012 1:54... | Reader On-line | Reader (001 ... | | | 0 |
| 582 | 2/13/2012 2:11... | Attempt | Reader (001 ... | UNKNOWN ... | | 0 |

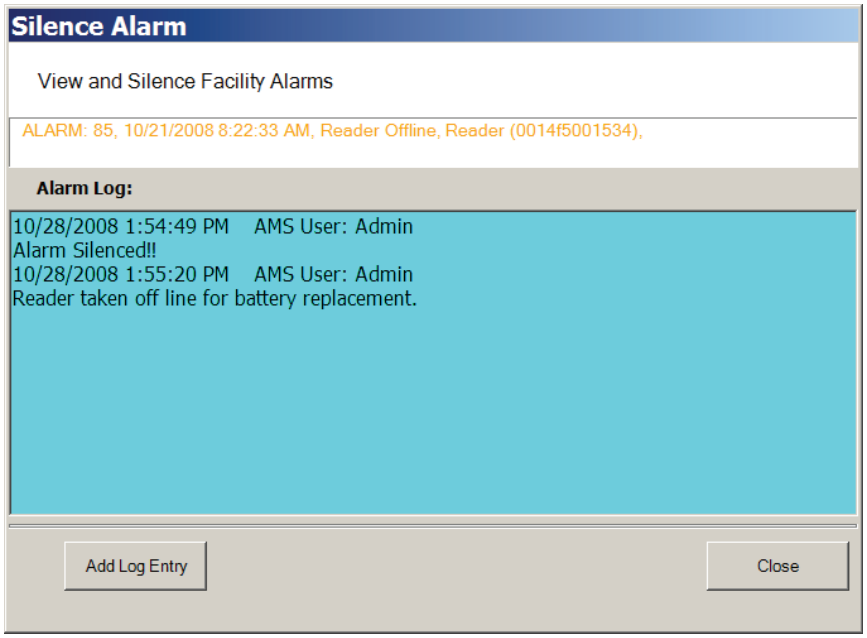
User: Admin

## Alarms Tab

When an alarm is triggered, such as a door is blocked open or forced entry, the system creates an alarm record. When you select the Alarms tab, unanswered alarms display in red and activate an alarm sound .wav file on your computers sound system.

When you "silence" an alarm in Transactions, you are simply telling the system that you have recognized the alarm condition. The alarm sound .wav file will stop on your computer system for that alarm and the display color changes from red to yellow. A log will be generated recording the time and date the alarm was silenced. You can add a comment to this log to further define the incident

Figure 132 Silencing an alarm in the Alarms tab



ALARM: 85, 10/21/2008 8:22:33 AM, Reader Offline, Reader (0014f5001534),

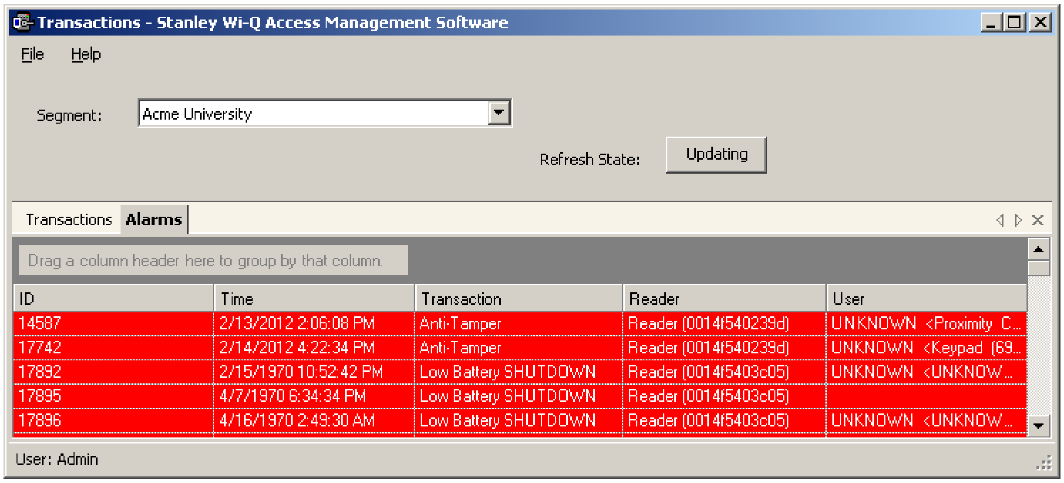
Alarm Log:

```
10/28/2008 1:54:49 PM    AMS User: Admin
Alarm Silenced!!
10/28/2008 1:55:20 PM    AMS User: Admin
Reader taken off line for battery replacement.
```

### *Create an Alarm Response Protocol*

Remember, when you “Silence” an alarm in Wi-Q AMS Transactions, you are only silencing a .wav file; you are not resolving the problem. It is important to establish Alarm Response protocols within your segment and follow up with action. See “Responding to Alarms” on page 188.

Figure 133 Alarms Tab



Transactions - Stanley Wi-Q Access Management Software
File
Help
Segment:
Acme University
Refresh State:
Updating
Transactions
Alarms
Drag a column header here to group by that column.
User: Admin

| ID | Time | Transaction | Reader | User |
|---|---|---|---|---|
| 14587 | 2/13/2012 2:06:08 PM | Anti-Tamper | Reader (0014f540239d) | UNKNOWN <Proximity C... |
| 17742 | 2/14/2012 4:22:34 PM | Anti-Tamper | Reader (0014f540239d) | UNKNOWN <Keypad (69... |
| 17892 | 2/15/1970 10:52:42 PM | Low Battery SHUTDOWN | Reader (0014f5403c05) | UNKNOWN <UNKNOW... |
| 17895 | 4/7/1970 6:34:34 PM | Low Battery SHUTDOWN | Reader (0014f5403c05) | |
| 17896 | 4/16/1970 2:49:30 AM | Low Battery SHUTDOWN | Reader (0014f5403c05) | UNKNOWN <UNKNOW... |

## Transaction Types

The database records transactions by category. Under normal operating conditions, the most common transaction types will be Entry and Request to Exit. The system recognizes various alarm and status categories, such as:

- Alarm Cleared (All)
- Alarm Cleared (Forced Entry)
- Anti-Tamper

## Organizing and Sorting Transactions

AMS makes it easy to manage high transaction traffic. You could view every transaction in the system, real time. However, in large systems where hundreds of transactions can occur in a very short time, you may want to limit the number of transactions displayed, or group them in a way that makes sense for system activity. For example, you can limit the transactions list to only those that occurred in the last ten minute timespan; you can sort ascending or descending by column header; and you can arrange the columns in any order you wish. In addition, you can create a hierarchy, rather than a columnar view.

## Display by Timespan

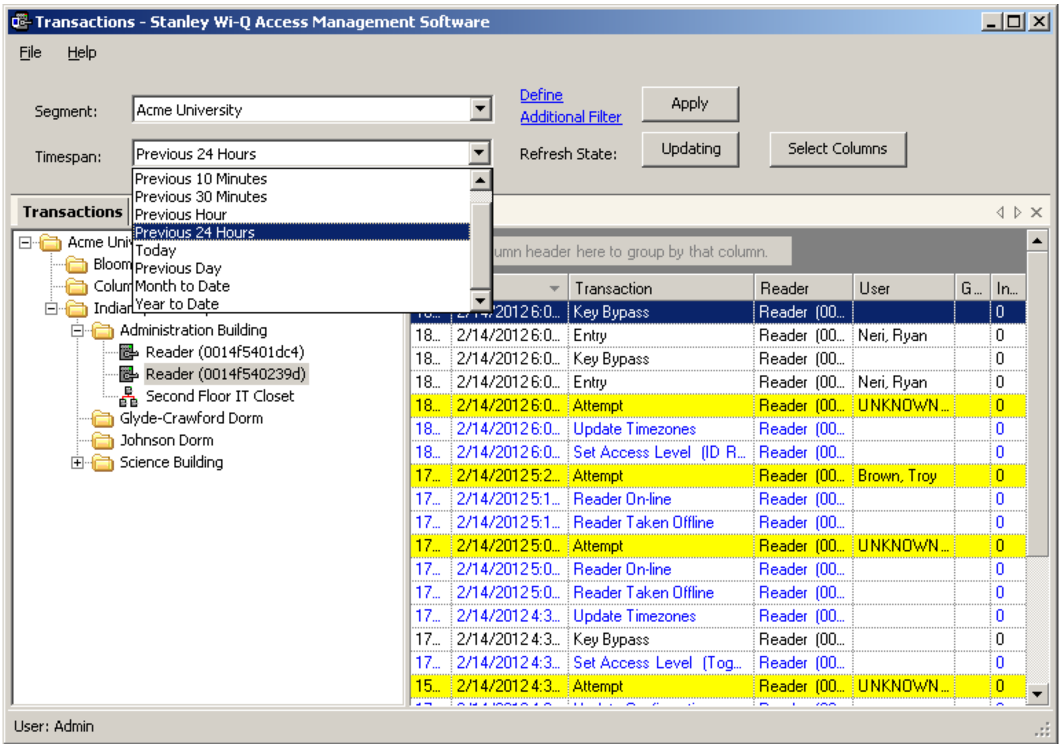
By default, Transactions displays all transactions in the order they occur. If you are monitoring all transactions, you may want to simply watch them as they occur. However, in large systems, your effort may best be served by limiting transactions to only those that have occurred in the previous ten minutes, or previous hour. The software gives you a number of options from All to year to date.

## To set the display timespan

In the Transactions Tab, select the Segment you wish to monitor.

Under Timespan, select the timespan you wish to display from the drop-down list. The display list on the right changes to reflect your selection.

Figure 134  Transactions Timespan



Segment: Acme University

Timespan: Previous 24 Hours

Refresh State: Updating

| | | Transaction | Reader | User | G... | In... |
|---|---|---|---|---|---|---|
| [illegible] | /2012 6:0... | Key Bypass | Reader (00... | | | 0 |
| 18... | 2/14/2012 6:0... | Entry | Reader (00... | Neri, Ryan | | 0 |
| 18... | 2/14/2012 6:0... | Key Bypass | Reader (00... | | | 0 |
| 18... | 2/14/2012 6:0... | Entry | Reader (00... | Neri, Ryan | | 0 |
| 18... | 2/14/2012 6:0... | Attempt | Reader (00... | UNKNOWN... | | 0 |
| 18... | 2/14/2012 6:0... | Update Timezones | Reader (00... | | | 0 |
| 18... | 2/14/2012 6:0... | Set Access Level (ID R... | Reader (00... | | | 0 |
| 17... | 2/14/2012 5:2... | Attempt | Reader (00... | Brown, Troy | | 0 |
| 17... | 2/14/2012 5:1... | Reader On-line | Reader (00... | | | 0 |
| 17... | 2/14/2012 5:1... | Reader Taken Offline | Reader (00... | | | 0 |
| 17... | 2/14/2012 5:0... | Attempt | Reader (00... | UNKNOWN... | | 0 |
| 17... | 2/14/2012 5:0... | Reader On-line | Reader (00... | | | 0 |
| 17... | 2/14/2012 5:0... | Reader Taken Offline | Reader (00... | | | 0 |
| 17... | 2/14/2012 4:3... | Update Timezones | Reader (00... | | | 0 |
| 17... | 2/14/2012 4:3... | Key Bypass | Reader (00... | | | 0 |
| 17... | 2/14/2012 4:3... | Set Access Level (Tog... | Reader (00... | | | 0 |
| 15... | 2/14/2012 4:3... | Attempt | Reader (00... | UNKNOWN... | | 0 |

User: Admin

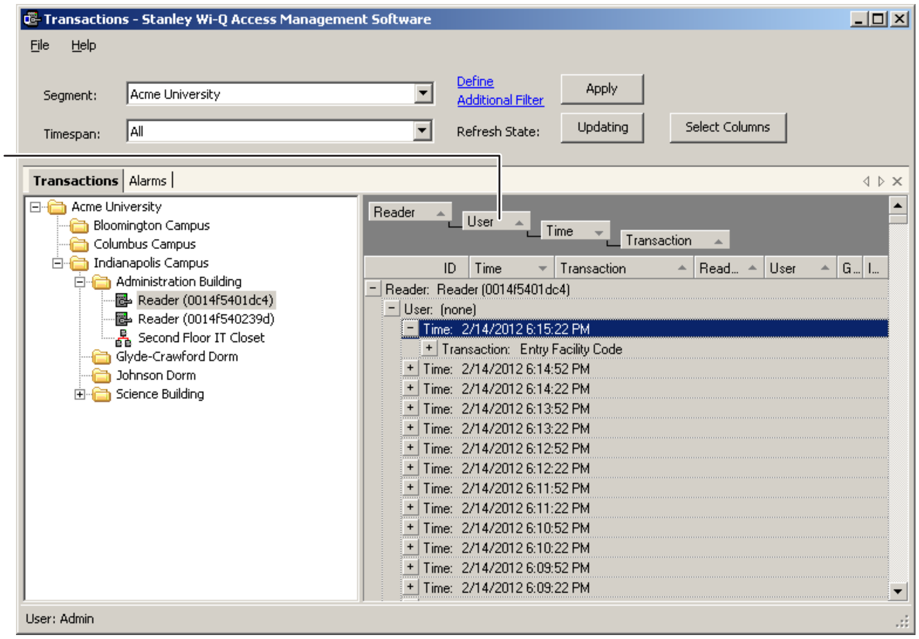
## Sort by Column Header

You can sort Transactions by column header in ascending or descending order. This is helpful, depending on what you are looking for. If you simply want to watch transactions in the order they occur, the default setting—sorted by ID, descending—will display the most recent transaction on the top line of the list. However, if you have an interest in viewing all the activity of a particular user, you can sort alphabetically by User credential. As with common database programs, you can move the columns in the column header to any order you wish. Transactions will remember your changes and display in the new order when you next open the program.

## View Transactions in Tree Levels

You can display transactions similar to the way you view the Segment Tree in Configurator. This is useful to minimize and organize the amount of data you view at one time.

Figure 135    Transactions in Tree Levels


Drag column headers to gray area.

Transactions - Stanley Wi-Q Access Management Software

Segment: Acme University

Timespan: All

Refresh State: Updating

User: Admin

```
Acme University
  Bloomington Campus
  Columbus Campus
  Indianapolis Campus
    Administration Building
      Reader (0014f5401dc4)
      Reader (0014f540239d)
      Second Floor IT Closet
    Glyde-Crawford Dorm
    Johnson Dorm
    Science Building
```

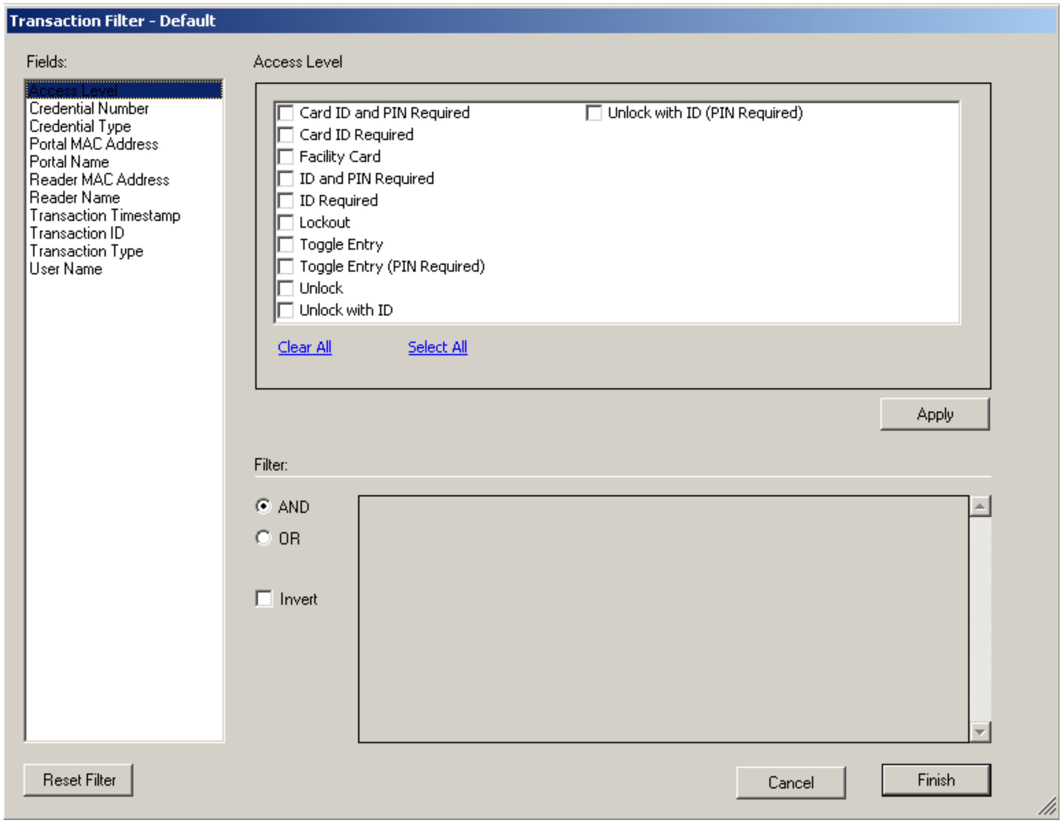
```
Reader: Reader (0014f5401dc4)
  User: (none)
    Time: 2/14/2012 6:15:22 PM
      Transaction: Entry Facility Code
    Time: 2/14/2012 6:14:52 PM
    Time: 2/14/2012 6:14:22 PM
    Time: 2/14/2012 6:13:52 PM
    Time: 2/14/2012 6:13:22 PM
    Time: 2/14/2012 6:12:52 PM
    Time: 2/14/2012 6:12:22 PM
    Time: 2/14/2012 6:11:52 PM
    Time: 2/14/2012 6:11:22 PM
    Time: 2/14/2012 6:10:52 PM
    Time: 2/14/2012 6:10:22 PM
    Time: 2/14/2012 6:09:52 PM
    Time: 2/14/2012 6:09:22 PM
```

In this example, we placed Readers at the top of the tree; however, you can place them in any hierarchy you wish. When you select the plus sign next to the top level, the second and third level items expand to display. It's easy to create a Transactions Tree: simply drag and drop the column headers into position.

## Transaction Filters

If you want to search for a specific transaction by certain criteria (user name, reader name, etc.), click on Define Additional Filter at the top of the Transactions module. The Transaction Filter dialog box will open.

Figure 136 Transaction Filters



Transaction Filter - Default

Fields:

- Access Level
- Credential Number
- Credential Type
- Portal MAC Address
- Portal Name
- Reader MAC Address
- Reader Name
- Transaction Timestamp
- Transaction ID
- Transaction Type
- User Name

Access Level

□ Card ID and PIN Required
□ Card ID Required
□ Facility Card
□ ID and PIN Required
□ ID Required
□ Lockout
□ Toggle Entry
□ Toggle Entry (PIN Required)
□ Unlock
□ Unlock with ID
□ Unlock with ID (PIN Required)

Filter:

● AND
○ OR

□ Invert

A list of fields is located on the left side of the dialog box. Clicking on a field will bring up checkbox or dropdown options specific to the selected field. In Figure 141, the Access Level field is selected. Here, you can check multiple options. Once you've selected your options, click Apply. The Filter section at the bottom of the dialog box will reflect what filter you've applied.

You can turn on multiple filters with the use of the AND/OR selection options in the Filter section. If you'd like to search your transactions by a specific access level and reader name, apply both filters and select AND.

If you want to omit certain transactions from your list, you can click the Invert checkbox once you've applied your filters. Inverting will adjust your list so that the applied filters are not shown.

When finished creating filters, click Finish. If you would like to clear your filters, click on Reset Filter.

## Responding to Alarms

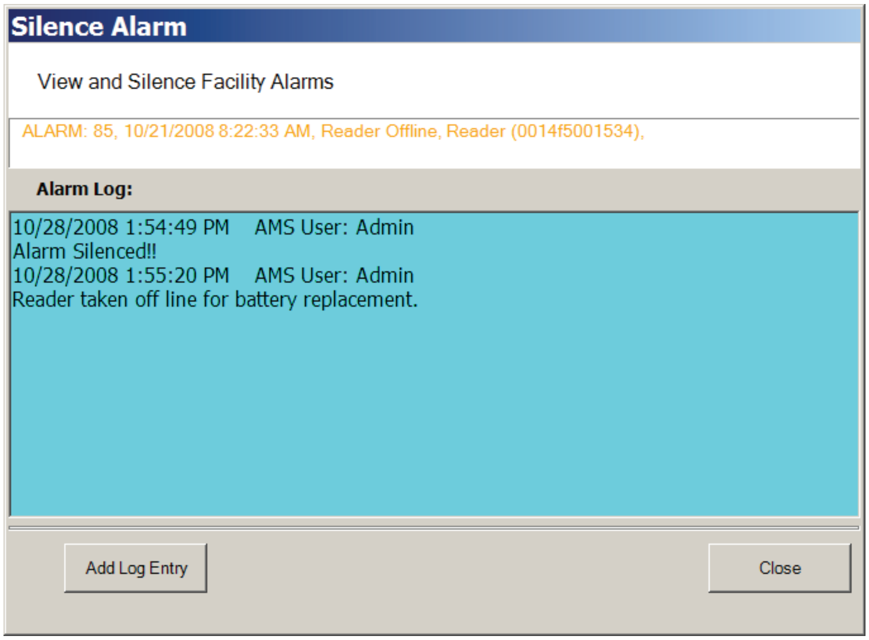
When an alarm occurs, the system immediately displays it in red in the Transactions Tab. The alarm will be categorized as either an Anti-Tamper or a Forced Entry type. At this point, you will take action according to your segment's security plan. In a small segment, you may simply dispatch a person to physically investigate the source of the alarm. In larger facilities with I/O devices in the system, the alarm may trigger a video recorder, a lighting plan, or other I/O device. In either case, you will respond to the alarm in Transactions using the Alarms Tab.

As with the Transactions Tab, you can sort the alarms in ascending and descending order with a column, and change the order in which the columns display, and create an Alarms Tree.

### To respond to and silence an alarm

1. Select the Alarms Tab.
2. Double-click on an active alarm (displaying in red). The Silence Alarm text box opens. Alarm details display in red text in the message area.
3. Click on Silence Alarm.
4. To add a log entry, click Add Log Entry.
5. Enter a comment in the text box.
6. When finished, click Add to Log.
7. The message entered will become the record for the alarm event.

Figure 137 Log Entry Recorded



Silence Alarm

View and Silence Facility Alarms

ALARM: 85, 10/21/2008 8:22:33 AM, Reader Offline, Reader (0014f5001534),

Alarm Log:

```
10/28/2008 1:54:49 PM    AMS User: Admin
Alarm Silenced!!
10/28/2008 1:55:20 PM    AMS User: Admin
Reader taken off line for battery replacement.
```

8 Select Close. In the Alarms Tab, the alarm line changes from red to yellow and the alarm sound stops.

9 You can continue to add comments in the alarm's log until the condition is resolved.

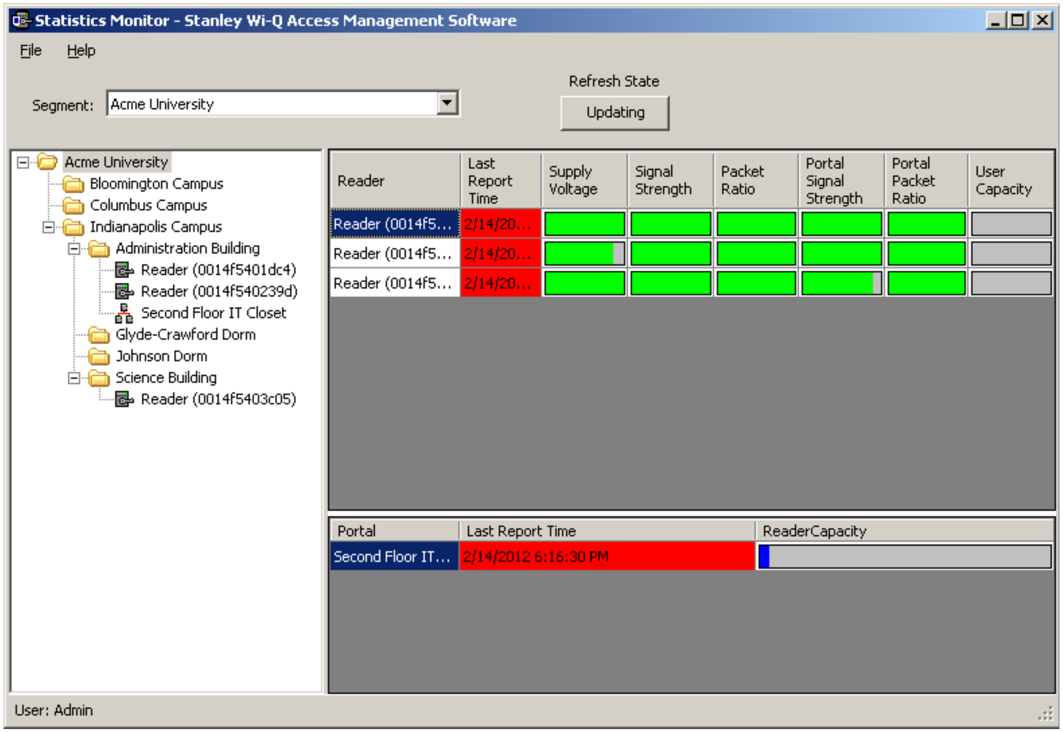
# Statistics Monitor

The Statistics Monitor is a powerful tool that displays a real-time, color coded overview of system performance. When you set up your new system, and want to monitor ongoing system performance, you will use the Statistics Monitor. This tool appears similar to the Configurator, displaying the Segment Tree for the segment you select on the left of the screen, and the hardware categories on the right. To check the performance of the entire system, select the segment at the top of the tree. Reader statistics display at the top of the screen and Portal statistics display at the bottom.

You can access the Statistics Monitor from the Applications menu at the top of the Configurator Main Screen or launch it from the Windows Start menu as a separate application

## Reader Statistics

Figure 138 Viewing Reader Statistics


Statistics Monitor - Stanley Wi-Q Access Management Software
File
Help
Refresh State
Updating
User: Admin

Segment: Acme University

- Acme University
  - Bloomington Campus
  - Columbus Campus
  - Indianapolis Campus
    - Administration Building
      - Reader (0014f5401dc4)
      - Reader (0014f540239d)
      - Second Floor IT Closet
    - Glyde-Crawford Dorm
    - Johnson Dorm
    - Science Building
      - Reader (0014f5403c05)

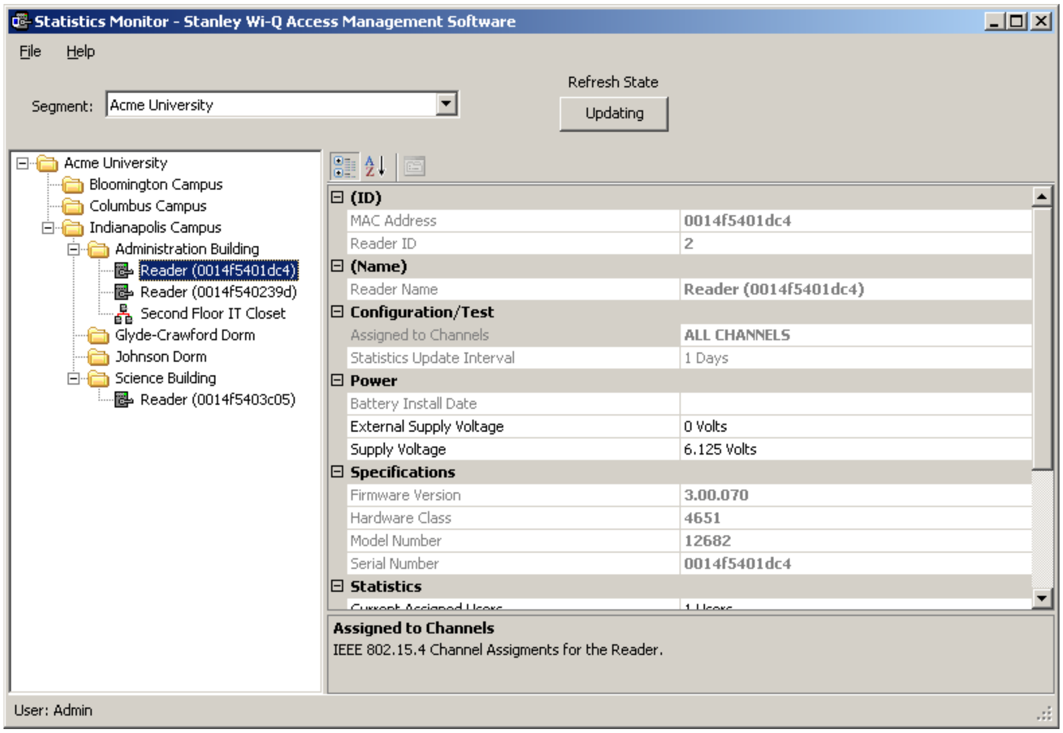
| Reader | Last Report Time | Supply Voltage | Signal Strength | Packet Ratio | Portal Signal Strength | Portal Packet Ratio | User Capacity |
|---|---|---|---|---|---|---|---|
| Reader (0014f5… | 2/14/20… | 🟩 | 🟩 | 🟩 | 🟩 | 🟩 | |
| Reader (0014f5… | 2/14/20… | 🟩 | 🟩 | 🟩 | 🟩 | 🟩 | |
| Reader (0014f5… | 2/14/20… | 🟩 | 🟩 | 🟩 | 🟩 | 🟩 | |

| Portal | Last Report Time | ReaderCapacity |
|---|---|---|
| Second Floor IT… | 2/14/2012 6:16:30 PM | |

In this example, the system is performing well, delivering transactions at an acceptable level. To display the actual measurement, hover the cursor over a bar.

To get more detail; for example, to diagnose the problem of low signal for a particular reader, you can navigate to that reader in the Segment Tree and see data for only that reader. You can also double-click the reader on the right panel. Specific information for the selected reader displays in the list on the right.

Figure 139 Display reader detail


Statistics Monitor - Stanley Wi-Q Access Management Software
File
Help
Refresh State
Updating

Segment: Acme University

- Acme University
  - Bloomington Campus
  - Columbus Campus
  - Indianapolis Campus
    - Administration Building
      - Reader (0014f5401dc4)
      - Reader (0014f540239d)
      - Second Floor IT Closet
    - Glyde-Crawford Dorm
    - Johnson Dorm
    - Science Building
      - Reader (0014f5403c05)

| | |
|---|---|
| **(ID)** | |
| MAC Address | 0014f5401dc4 |
| Reader ID | 2 |
| **(Name)** | |
| Reader Name | Reader (0014f5401dc4) |
| **Configuration/Test** | |
| Assigned to Channels | ALL CHANNELS |
| Statistics Update Interval | 1 Days |
| **Power** | |
| Battery Install Date | |
| External Supply Voltage | 0 Volts |
| Supply Voltage | 6.125 Volts |
| **Specifications** | |
| Firmware Version | 3.00.070 |
| Hardware Class | 4651 |
| Model Number | 12682 |
| Serial Number | 0014f5401dc4 |
| **Statistics** | |
| Current Assigned Users | 1 Users |

**Assigned to Channels**
IEEE 802.15.4 Channel Assigments for the Reader.

User: Admin

Here, you can see the reader's MAC Address, ID, Reader Name, and the Portal associated with it. You can also view the reader's power performance.

## Automatic Updates

The Updating button can be used to pause automatic updating to view a snap shot of data. This is especially useful when viewing the top level, where the values may be changing rapidly.

## Configuration/Test

Under the Configuration/Test category inside a reader's property list, you can see the Statistics Update Interval. This value can be changed in the Readers tab of the Configurator application. For more information on configuring readers, see Chapter 4, "Configuring Segments, Portal Gateways and Controllers".

## Power

To view individual reader performance:

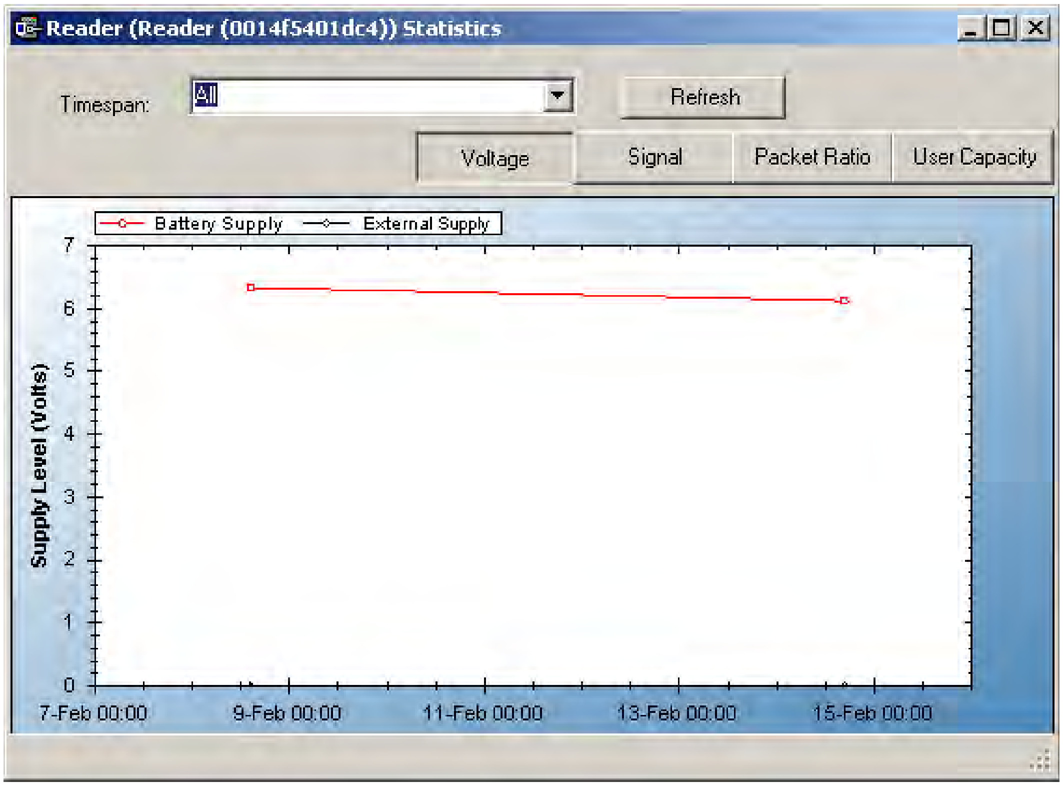
1 Under the Power Category, place the cursor in the field next to Supply Voltage, and select the ellipsis button.

2 The Reader Statistics chart opens at the Voltage Tab. From here you can also check the Signal, Packet Ratio, and User Capacity.

## Voltage Tab

The Voltage Tab displays battery and external power supply to ensure battery integrity and longevity. If you see a downward trend, you should consider replacing the battery for preventive maintenance.

Figure 140 Reader Statistics Voltage Tab



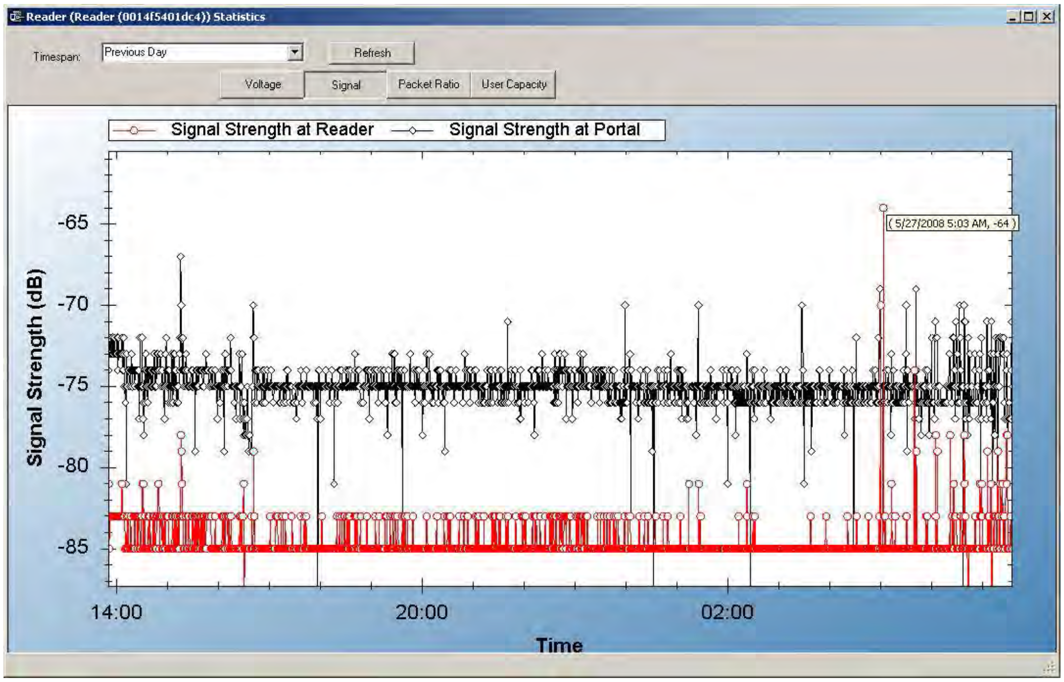
Every minute, the reader sends a beacon to the Portal Gateway with signal strength, battery voltage, external supply voltage and packet transfer ratio information. These statistics are stored at the rate defined by the Statistics Update Interval.

Select Refresh to get the latest readings, or you can reset the timespan to various intervals relevant to your diagnostic evaluation. You can move through the tabs as you check the system performance.

## Signal Tab

The Signal Tab displays the signal strength at the reader and at the reader's Portal.

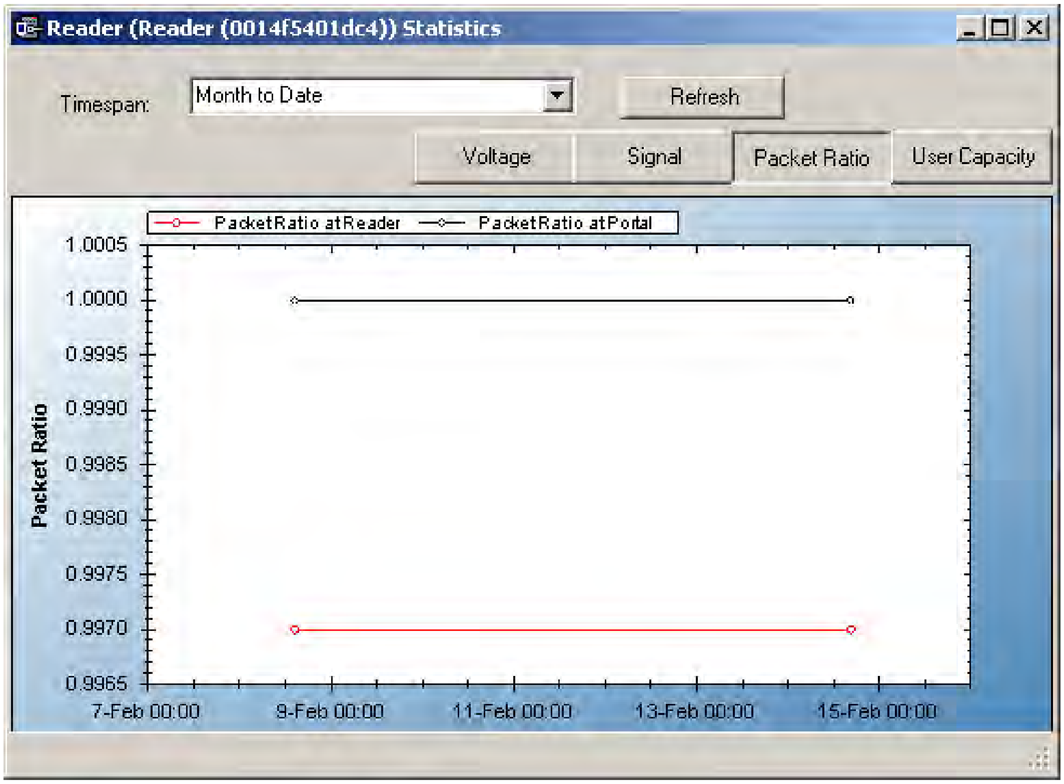
Figure 141 Reader Statistics Signal Tab



## Packet Ratio Tab

The Packet Transfer Ratio at Reader is the number of valid packets received versus the total number of packets sent to the reader. The Packet Transfer Ratio at Portal is the number of valid packets sent from the reader versus the total number of packets received at the Portal. If the Packet Ratio is high (near 1, or 100%) your readers are performing well, even though signal strength might be low. If signal strength is high and Packet Ratio is low, you may have a problem at the reader, or there may be interference on the channel that the Portal is using.

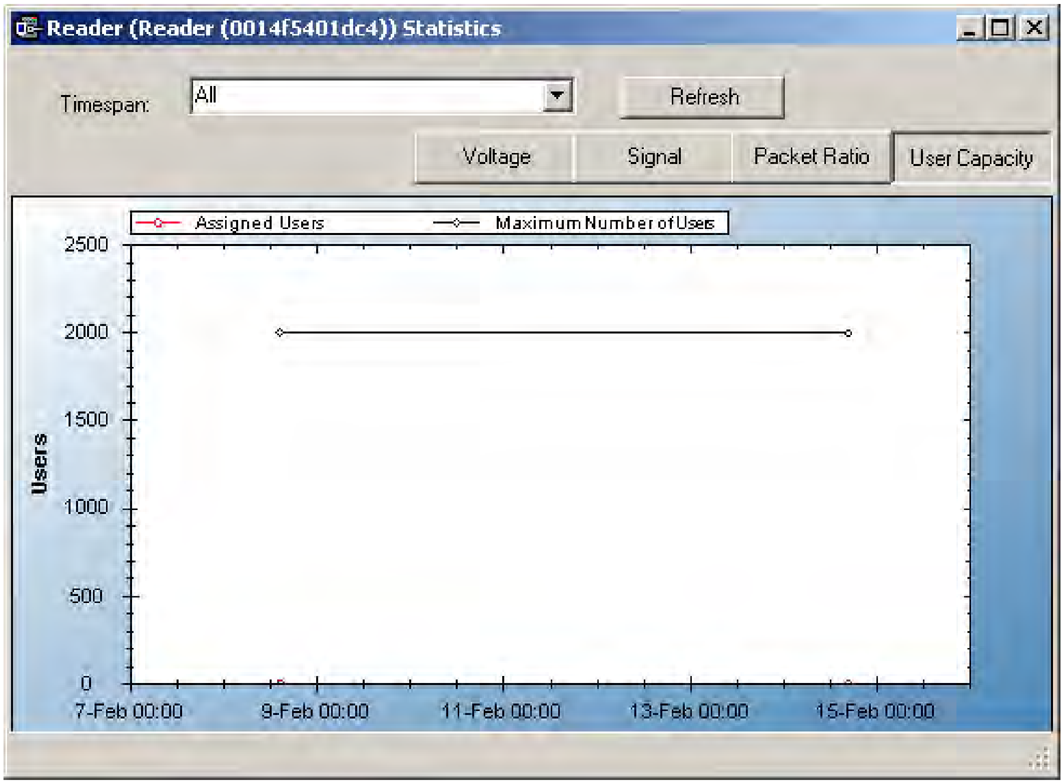
Figure 142 Reader Statistics Packet Radio Tab



## User Capacity

This chart shows the Max allowable users for this reader and the current use. If you find that the use is nearing capacity, you may want to consider upgrading the reader capacity. See “Segment Item Upgrades” on page 162.

Figure 143 Reader Statistics User Capacity Tab

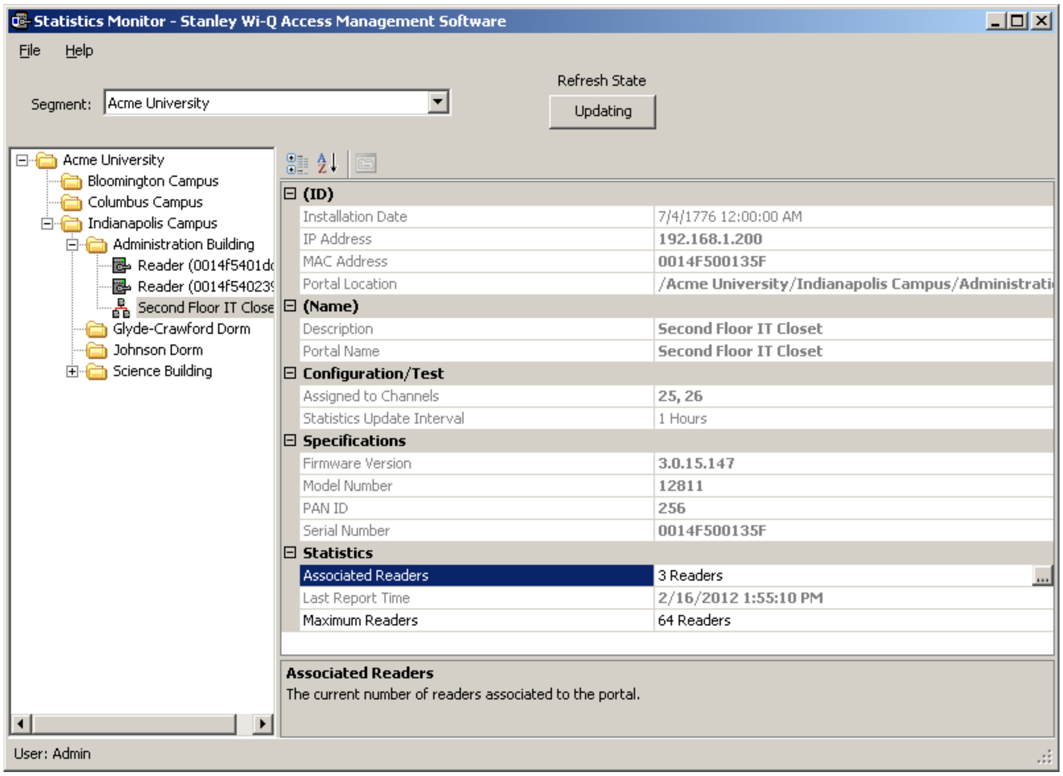


## Portal Statistics

Portal Statistics display at the bottom of the Statistics Monitor. Select the top level in the Segment Tree to display all Portals in the system. See Figure 143.

Clicking on a Portal within the Segment Tree in the Statistics Monitor will display the Portal's properties on the right.

Figure 144 Statistics Monitor Portal Properties



Segment: Acme University

| | |
|---|---|
| **(ID)** | |
| Installation Date | 7/4/1776 12:00:00 AM |
| IP Address | 192.168.1.200 |
| MAC Address | 0014F500135F |
| Portal Location | /Acme University/Indianapolis Campus/Administrati |
| **(Name)** | |
| Description | Second Floor IT Closet |
| Portal Name | Second Floor IT Closet |
| **Configuration/Test** | |
| Assigned to Channels | 25, 26 |
| Statistics Update Interval | 1 Hours |
| **Specifications** | |
| Firmware Version | 3.0.15.147 |
| Model Number | 12811 |
| PAN ID | 256 |
| Serial Number | 0014F500135F |
| **Statistics** | |
| Associated Readers | 3 Readers |
| Last Report Time | 2/16/2012 1:55:10 PM |
| Maximum Readers | 64 Readers |

**Associated Readers**
The current number of readers associated to the portal.

The Portal ID, Name, Specifications such as Firmware Version, Model Number, PAN ID, and Serial Number display on the right. In the Statistics category, you can see how many readers are associated with the Portal and its current maximum reader capacity.

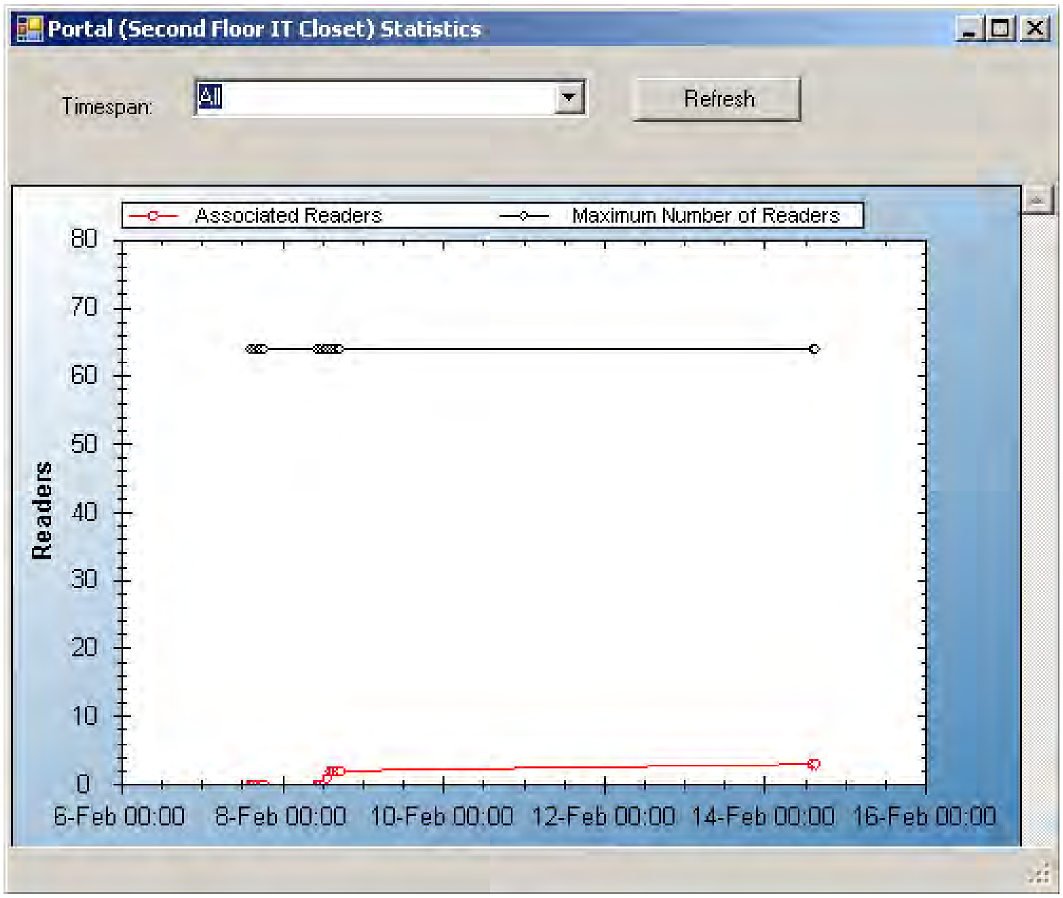
## Portal Diagnostics

You can check the reader counts associated with a Portal over time for a detailed look at Portal capacity. This is useful to determine if some readers are operating intermittently or dropping out of range at intervals.

### To review associated readers at Portals

1 In the Portal detail display, Statistics Category, place the cursor in the Maximum number of Readers field and select the ellipsis button. The Portal statistics chart opens for the Portal selected.

Figure 145 Portal Statistics



Portal (Second Floor IT Closet) Statistics

Timespan: All

If the Associated Readers line appears steady and reflects the number of readers you know are associated with the Portal, your readers are consistently being recognized by the Portal. If this line is erratic; for example, showing a drop or fluctuation on associated readers over time, you may want to review the readers to see if there is a problem with power supply or signal that is making one or more of them drop out of range.

## Configuration/Test

In the Configuration/Test category, the Statistic Update Interval is visible. You can modify this value in the Configurator application's Portals Tab.

## Reports

You can view a wide variety of reports based on data collected in Configurator and Transactions. You can access Reports from the Applications menu at the top of the Configurator Main Screen or launch it as a separate application.

### To Launch Wi-Q AMS Reports

1 Select Start>All Programs> Stanley Security Solutions >Stanley Wi-Q AMS> Wi-Q Reports.

2 Enter your Login and Password. Reports opens.

### Reports Overview

The software provides seven reports that you can modify:

**Users of Readers** — Generate a report that lists all readers and the users currently assigned to them, or you can specify a particular reader and view only the users for that reader.

**Users of Groups** — Generate a report that lists all user groups and the users currently assigned to them, or you can specify a particular user group and view only the users for that group.

**Users Entry Log** — Generate a report that lists user entry data for all users and all readers, or you can specify which readers and users to list. You can also specify a timespan or Begin and End dates on which to report.

**Users Entry/Exit Log** — Generate a report that lists user entry/exit data for all users and all readers, or you can specify which readers and users to list. You can also specify a timespan or Begin and End dates on which to report.

**Alarms Log** — Generate a report by alarm for all readers in all timespans, or specify which alarms, timespans, or Begin and End dates.

**Reader Alarms** — Generates a report by reader for all alarms in all timespans, or specify which readers, timespans, or Begin and End dates.

**Transactions** — Generate a report for all transactions at all readers for all users during all timespans, or specify which transactions you wish to list.

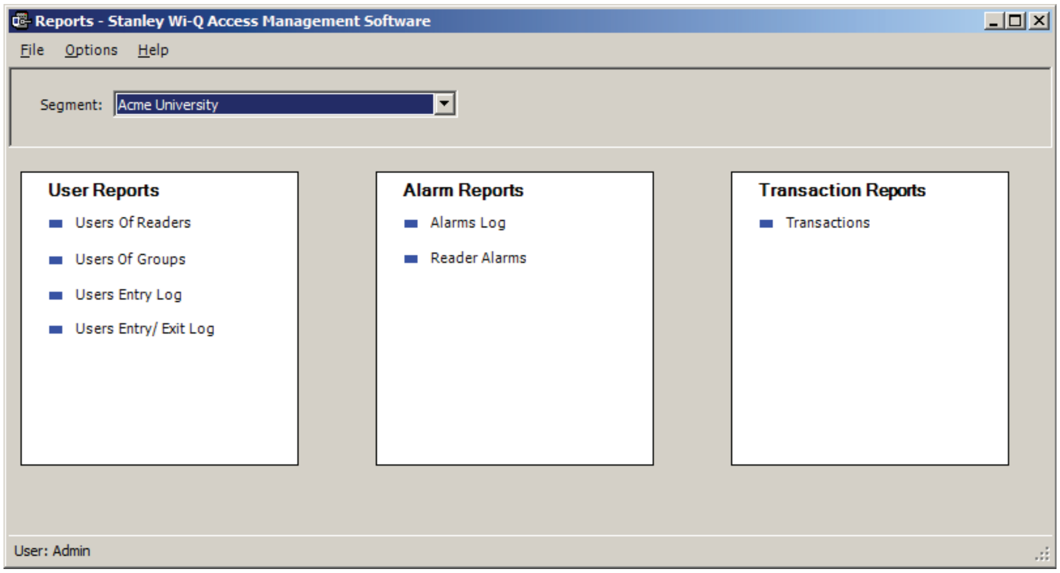
## Creating Reports

The first step in creating reports in the software is to configure report settings. Here you can enter your company name and include a picture or logo that will be included in any files exported or printed from the application. Once you have configured your report settings you are ready to choose a report type and generate the report. From there you can print the report, or export the report to any number of file formats such as .doc, .rtf, .rpt, etc.

To get started, launch Reports from the Configurator main menu.

Once you enter your login and password, the Reports main screen opens.

Figure 146 Reports



Segment: Acme University

User: Admin