



**PERCo-Web ACS Software**

**PERCo-WS**

**«Standard software package»**

USER MANUAL

# CONTENTS

1	Introduction .....	4
2	Log-in .....	5
3	Page description.....	6
4	«Staff» section .....	8
4.1	«Employees» subsection .....	8
4.1.1	«Current» tab .....	8
	Employee's registration card .....	11
	New employee data entry .....	17
	Changing ID card validity period.....	18
	ID Card temporary blocking.....	18
	ID Card withdrawal.....	19
	Employee dismissal .....	19
	Temporary change of employee data .....	19
	Supporting document issue.....	22
	Print employee individual record .....	23
4.1.2	«Dismissed» tab .....	24
	Reinstatement of employee .....	25
4.2	«Work schedules» subsection .....	25
4.2.1	«Work schedules» tab .....	26
	«Working schedule adding» window.....	27
	Create a weekly work schedule.....	31
	Create a shift work schedule .....	31
	Creating By presence schedule.....	32
4.2.2	«Holidays» tab .....	34
	Creation of predefined values calendar.....	34
	Creation of holidays calendar .....	36
4.3	«Departments» subsection .....	37
4.3.1	Creating the list of departments.....	38
4.4	«Positions» subsection.....	40
4.4.1	Creating the list of positions.....	41
4.5	«Additional data» subsection.....	41
4.5.1	Creation of the additional information field.....	42
5	«Pass office» section.....	44
5.1	«Visitors» subsection .....	44
5.1.1	«Ordered» tab.....	45
5.1.2	«Current» tab .....	46
	Issuing card for visitor .....	48
	Visitor card issue.....	49
5.1.3	«Archive» tab .....	50
	Issue pass for Archived visitor.....	51
5.2	«Employees» subsection .....	52
5.2.1	Issue Card .....	54
5.2.2	Edit Card .....	56
5.2.1	Block/Unblock Card .....	57
5.2.2	Withdraw Card.....	58
5.3	«Access templates» subsection.....	58
5.3.1	«Templates» tab.....	58
	Creation of Access template .....	59

5.3.2	«Time zones» tab .....	62
	«Time zones» access criteria configuration .....	63
5.3.3	«Weekly access criteria» tab .....	63
5.3.4	«Shift-day access criteria» tab .....	65
5.3.5	«Flexible weekly access criteria» tab .....	67
5.3.6	«Holidays for weekly access criteria» tab .....	69
	Creation of a holidays list .....	69
5.4	«Card Design» subsection .....	70
5.4.1	Creation of IDCard template .....	70
5.5	«Visitors report» Subsection .....	72
6	«Access control» section .....	74
6.1	«Passage report» subsection .....	74
6.2	«Device management» subsection .....	75
6.2.1	Tab «Rooms» .....	75
	Giving commands to all devices of one premise .....	76
6.2.2	Tab «Devices» .....	76
	Giving a command to system device .....	76
6.3	«Room access report» subsection .....	77
7	«Pass Order» section .....	79
7.1	«Pass Order» tab .....	79
7.1.1	Pass Order for Visitor .....	80
7.2	«Archive» tab .....	82
7.2.1	Pass Order for Archived visitor .....	83
8	Control commands .....	84
9	Standart operations .....	85
9.1	Working area operations .....	85
9.2	Date and time .....	85
9.3	Selection of the department .....	87
9.4	The selection of premises .....	89
9.5	Adding Images .....	90
9.6	Search .....	90
9.7	Advanced search .....	90
9.8	Search of access cards .....	91
9.9	Access card issuing .....	92
9.10	Fingerprints scanning .....	93
9.11	Cards printing .....	93
9.12	Print spread sheet data .....	95
9.13	Data export .....	95
9.14	Data import .....	95

# 1 Introduction

This «*User manual*» of the **WS «Standard software package»** software module (hereinafter - manual) contains the description of working windows and action sequences for operating sections and subsections of the **WS module «Standard software package»** (hereinafter- *module*).

This manual should be used with the «*Administrator manual*» of **Web** system software. The description of «**Administrator**» section, as well as module license purchase procedure can be found in «*Administrator manual*» system software.

The module is aimed at maintenance of basic functions of **PERCo-Web** system.

***Important:***

Service documentation for the equipment and software of **PERCo-Web** system is available in electronic format on **PERCo** website, at the following URL: [www.perco.com](http://www.perco.com), in **Support> Downloads** section.

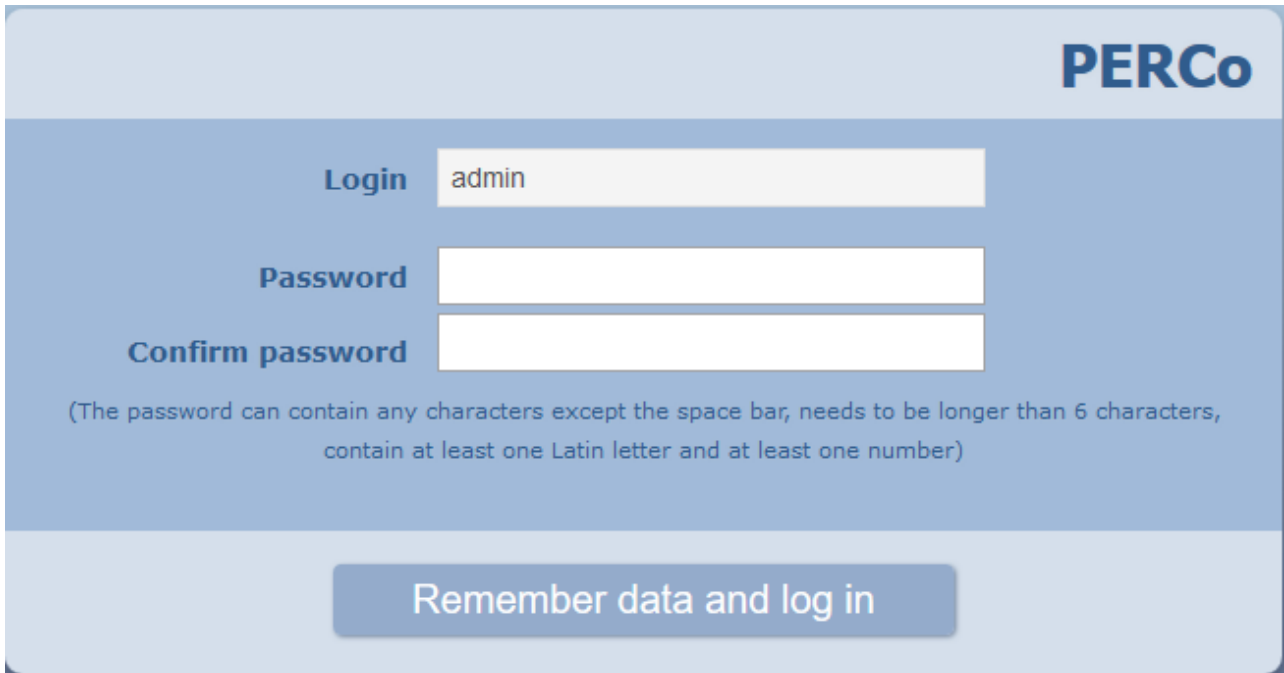
Used abbreviations:

WKS – workstation;  
DB – data base;  
OD – operating device;  
ACP – access control point;  
RC – remote control;  
PC – personal computer, notebook;  
SW – software;  
ACM – access control mode;  
ACS – access control system;  
DBMS – data base management system;  
T&A – time and attendance.

## 2 Log-in

Operation and customization of the system is performed via web-interface. To login:

1. Open web-browser, for example, *Internet Explorer*.
2. Use the URL bar and type in the IP-address of the PC where the system is installed and push Enter button on your keyboard. The Registration page will appear:



PERCo

Login admin

Password

Confirm password

(The password can contain any characters except the space bar, needs to be longer than 6 characters, contain at least one Latin letter and at least one number)

Remember data and log in

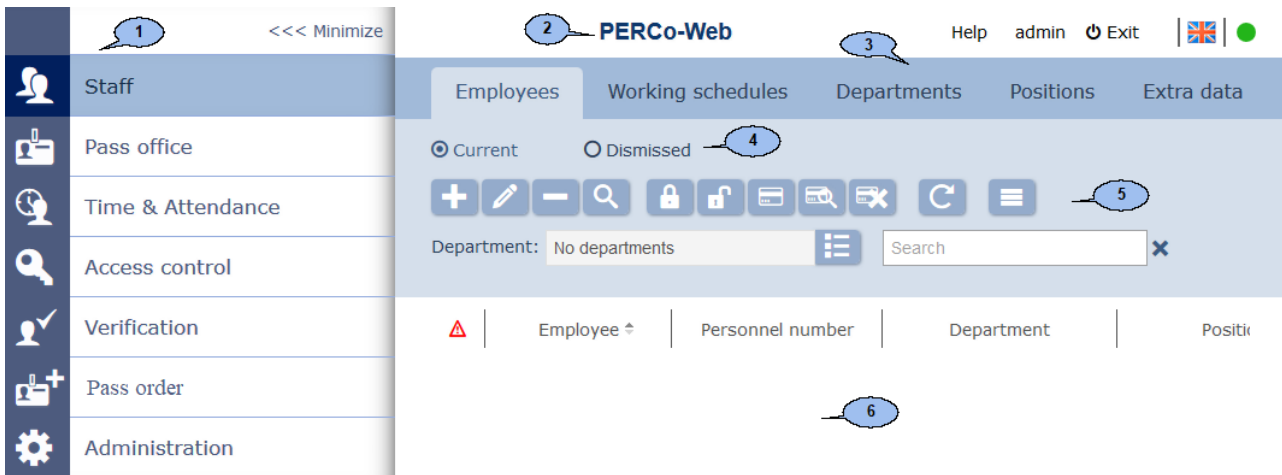
***Important:***

During the initial activation it is necessary to set a password for the unmodifiable administrator's `admin` account.








3. Type-in operator's login and password in the relevant fields to access the system. Push the **Enter** button. A new «**Employees**» subsection page of the [«Staff»](#) section will appear, or the first subsection that is available to operator.



### 3 Page description

A new «**Employees**» subsection page of the «**Staff**» section will appear after successful login. Page overview:



1. Navigation panel for section selection. The button <<< **Minimize** allows you to hide the navigation panel. Push the button >>> to open the navigation panel. The following sections are available:

-  **Staff**
-  **Pass office**
-  **Time & Attendance**
-  **Access control**
-  **Verification**
-  **Pass order**
-  **Administration**

2. Section title. Section title is only displayed when the navigation panel is hidden. The line also includes:
  - **Help** button for viewing documentation about the current page.
  - User name (operator's account).
  - **Exit** button for logging out.
  - Button  allows to change the system display language.
  -  Server connection status indicator. Red color indicates that the server connection is lost. Click on indicator to open the [«Configuration»](#) subsection of the «Administration» section.
3. Subsection selection panel. The list of available subsections depends on the selected section from the navigation panel.
4. Subsection tab selection.

5. Page toolbar. The toolbar may vary, depending on the selected sections and subsections.
6. Page working area.

## 4 «Staff» section

The section is intended for employees WKS organization. The section allows you to computerize the process of input and storage of employees data and helps to create the time-tables. It also helps to manage lists of positions and departments.

### 4.1 «Employees» subsection

The following tabs are available:

**Current** tab is used for:

- [data input about new employee](#);
- [employees data import](#) from .XLS, .XLSX or .CSV files.
- editing employees data;
- ID cards issue/withdrawal;
- scanning of employees fingerprints;
- [printing an ID card according to selected template](#);
- [temporary blocking / unblocking of employee ID card](#);
- [employee firing](#);
- [changing ID card expiration date](#);
- [issuing supporting documents](#) and Paid overtime documents;
- [temporary change of employee data](#);
- [printing employees individual records](#), as well as numbers of issued cards, supporting documents and documents for overtime work.

**Dismissed** tab is used for:

- [Restoration an earlier fired employee](#);
- deleting the data of fired employees.

#### 4.1.1 «Current» tab

Tab overview:

Employee	Personnel number	Department	Position	Work schedule	Access template	Card	Date of hiring	Photo
Baker Matthew Samuel	52	Administration	Senior Manager	5/2 10.00-19.00	For employees	48221365	10.11.2017	
Smith George Bill	56	Software Department	Programmer	5/2 9.00-17.45	For employees	4556878	10.11.2017	
Wilson Liam Daniel	87	Technology Department	Engineer	5/2 9.00-17.45	For employees	5562348	10.11.2017	

1. Subsection tab switch:

- **Current** – contains the list of employees.
- **Dismissed** – contains the list of fired employees.



2. Page toolbar:



**Add** – use this button to create a new employee and personal record.



**Edit** – use this button to edit data of the [individual record](#) that is selected in the working area. The option allows you to edit:

- personal information, additional information and photos,
- accounting data (department, position, time-table, access template),
- creation of a new tasks regarding automatic change of accounting data and blocking of ID card,
- issuing of supporting documents or overtime documents,
- issue / Withdraw the Card or change the validity date,
- add/ delete fingerprints to individual record.



**Dismiss** – click to fire the selected employee. In this case the data file will be moved to **Dismissed** tab.



**Advanced search** – allows you to apply filters to elements that are displayed in the working area.



**Block** – allows you to temporarily block access for the selected employee.



**Unblock** – allows you to unblock the previously blocked employee's ID card.



**Issue card** – button allows you to issue an ID card for the selected employee.



**Find card** – allows you to search the card by its number.






**Withdraw card** – button allows you to withdraw the previously issued card.








**Refresh the table** – this button allows you to update the data of the working area.




**More** – button allows you to open the command menu of additional options:



-  **Print employee card** – allows you to print employees accounting data with photo and supporting documents information.
-  **Cards printing** – allows you to print selected pass according to the chosen [template](#).
-  **Table print** – allows you to print data from the working area.
-  **Export into XLS** – allows you to save data from the working area to *MS Office Excel* file with `.xls` extension.
-  **Export into CSV** – allows you to save data from the working area to *OpenOffice Calc* file with `.csv` extension.

-  **Import from XLS, XLSX, CSV** – allows you to import employees data from the spreadsheet files with .XLS, .XLSX or .CSV extensions.
-  **Reset filters** – allows you to reset all applied filters. The working area will display all employees of all departments after reset operation is done.
-  **Output without/considering the temporary replacement** – allows to display/hide the information about [temporary account data change](#) of employees. Hide mode shows permanent data of employees.
-  **Submit all the data to the controllers** – allows you to send data about access permissions to controllers.
-  **Table display parameters** – designed for column selection that will be displayed in the working area.

[Search](#) – search input field.



**Select from list** – the button on the right side of the [Departments](#) field allows you to select employees of which departments to display. **Reset**  button allows you to clear the field.

3. The working area of the page contains the list of employees of the selected department. Sign  in the data line informs that his ID Card is blocked. Sign  in the data line informs that access rights weren't sent to all controllers.

***Important:***

[Sort](#) of the column elements, [change width](#) and [sequences](#) in the working area.


## Employee's registration card


An individual record is created for every employee. Open **Employee's registration card** window in «**Staff**» section, «**Employees**» subsection located on the **Current** tab by double clicking on the chosen employee, or by clicking **Add** or **Edit** buttons on the toolbar. Window overview:

1. Employee personal information panel:

- **Full name**
- **Personnel number**
- **Date of admission**

2. The panel consists of the following fields:

- **Department**
- **Position**
- **Work schedule**
- **Access template**
- **Valid from:** – a field for [date specification](#) since accounting data will take effect. To change the date, click the button  on the right side of the field.

 **Planner** – will open a **Planner** window for viewing, editing and creating new tasks regarding temporary changes of personal information.

3. Images editing panel. The following tools are available:

**Images:** drop-down menu allows you to select the category of images that will be added. Images can be added as employee/visitor photo or as additional graphic data.



**Upload from PC** – button for loading photo or document from the PC or local network to the system DB. Click the button to open standard explorer window. Choose an image.



**Delete image** – button for deleting of the previously loaded image that is displayed on the panel.

4. Additional data tab selector:

- **Additional fields**
- **Supporting documents**
- **Access card**
- **Fingerprints**

5. The working area of the chosen Additional data tab:

### Supporting documents

Window overview:

Additional fields		Supporting documents		Access card		Fingerprints	
document №	Document type	Name of the document	Duration	Document date	Start of the document	End of the document validity period	
44	Justificatory	International doc	08:00	10.11.2017	10.11.2017	10.11.2017	

[Save](#)



**Add** – a button for issuing a new supporting document or overtime document.



**Edit** – a button for changing the information of the selected document.




**Delete** – a button for deleting the selected document.

## Access card


Window overview:

The screenshot shows a configuration window with four radio buttons at the top: 'Additional fields', 'Supporting documents', 'Access card' (which is selected), and 'Fingerprints'. Below these, there are two input fields: 'Card / identifier:' containing the number '48221365' and a card icon button to its right; and 'Valid until:' containing the date '10.11.2019' and a calendar icon button to its right. A 'Save' button is located in the bottom right corner.

To enter the card number:

- a) Click **Issue card** button  on the right of the **Card / Identifier**. **Issue card** window will appear:

The 'Issue card' dialog box has a title bar with 'Issue card' and a close button. It contains a 'Card identifier:' label above an empty text input field. To the right of the input field is a gear icon button. Below the input field, the text 'Getting a card from: control reader' is displayed. An 'Ok' button is located in the bottom right corner.

- b) Click **Select** device to issue identifier button  to open the dialogue box:

The 'Select the device to get the identifier' dialog box has a title bar with the title and a close button. It contains a 'Control reader:' label followed by an unchecked checkbox. Below this are two dropdown menus: 'Controller:' and 'Reader:', both currently showing 'Undefined'. The 'Controller:' dropdown has a list icon and a close button to its right. At the bottom right, there are 'Save' and 'Cancel' buttons.

In the appeared window select a reader that will be used for the card issuing:

- Tick **Control reader:** checkbox if you are using such type of reader (set by default);
- Untick Desktop reader checkbox if you are using reader that is connected to the controller: then click **Select from list** button



to call up **Controllers** dialogue box:



Where you should select the controller and reader that is disconnected to it, then click OK button – Controllers dialogue box will be closed.

Click Save button to save parameters for Select device to issue identifier window, otherwise click Cancel button.

c) The following steps depend on parameters that are applied in sections «Administration» -- «Configuration» -- «Device» -- «Global parameters» -- «Readers operation mode».

- If the Protected area reading parameter is set to Reading mode, then identifier will be read at the moment when the card is issued by the selected reader. In order to issue a card: bring the card against the reader while you are in Issue card window.
- If the Protected area reading parameter is set to With card recording mode, then identifier of the card is defined by the Number Generation parameter:
  - **Manual input** – in this case, the card number must be entered manually in the Card identifier field;
  - **Random number** – in this case, a random number will be generated in the Card identifier field;

- o **In ascending order** – in this case, a program will generate a number value that is greater by one than the previously issued and put it in the Card identifier field;

In order to issue a card: bring the card against the reader and set a new identifier (manually or automatically) while you are in Issue card window.

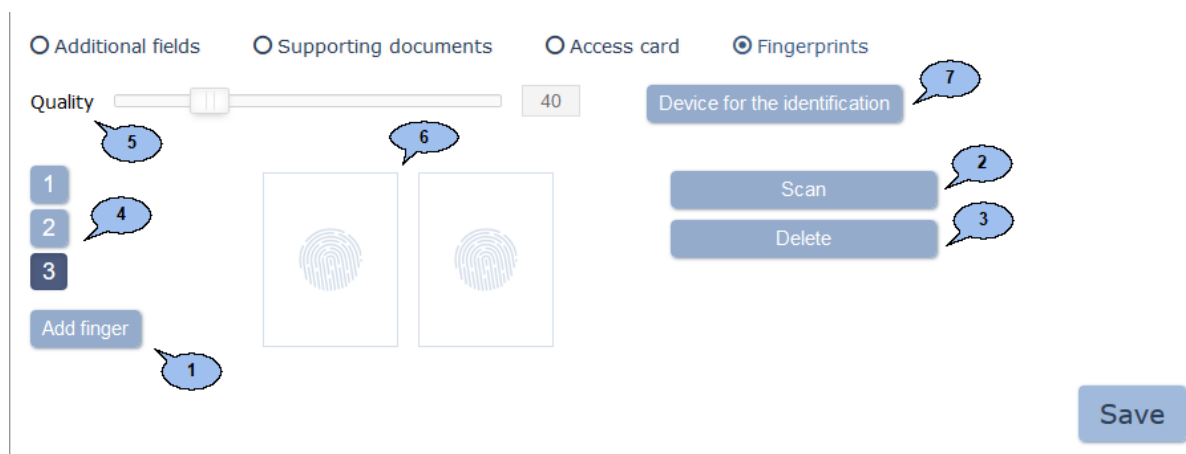
**Important:**

After receiving the writing command, the reader will personify the card (i.e. detect its type – Classic, ID, Plus (SL1, SL2, SL3), DESFire EV1, Ultralight C) and after that it will perform a writing operation.

- d) Click Ok button. The Issue card window will be closed, and entered card number will appear in the Card/Identifier field.

**Fingerprints**

Window overview:



**Add finger** – click the button to scan an additional finger.

**Scan** – click the button to start a finger scanning procedure. It is necessary to scan every finger twice for quality improving. Scanned fingerprints are displayed in the center of the tab.

**Delete** – click the button to delete the selected finger.

**1**

**2**

– buttons for switching between created fingers.

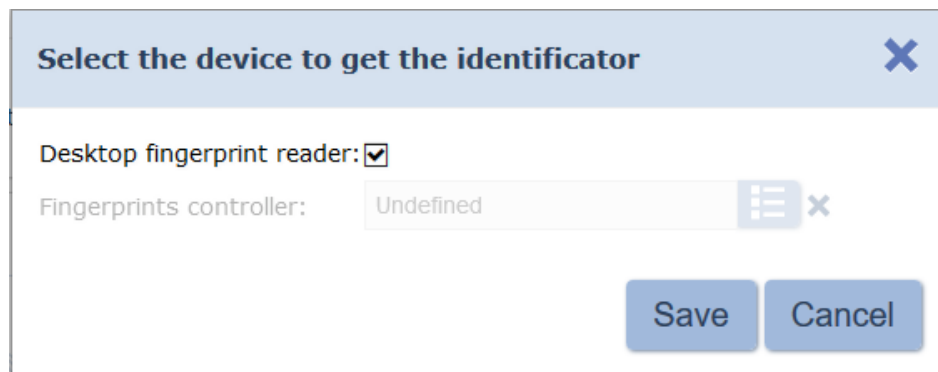
**Quality:** – slider that allows to choose the quality of fingerprints scanning. The current quality value is displayed on the right side of the slider.

**Important:**

Usage of high quality improves the image sharpness and affects on unauthorized passage prevention. Furthermore, the fingerprints scanning denial results increase (due to verification fingerprints scan error), so that necessity of rescanning.


**Device for the identification**

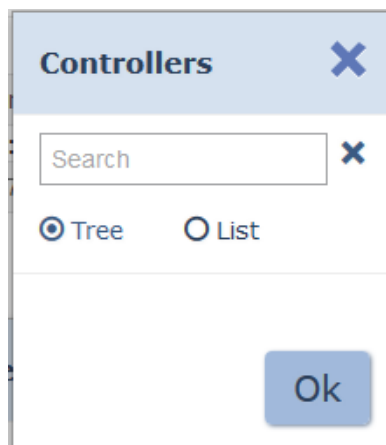
– the button allows to open Select device to issue identifier window:



In this window it is necessary to select scanner that will be used for fingerprints scanning:

- Tick Desktop fingerprint scanner checkbox if you are using such type of fingerprint scanner: (set by default);
- Untick Desktop fingerprint scanner checkbox if you are using Fingerprint controller for fingerprint scanner: then click **Select**

**from list** button  to call up **Controllers** dialogue box:



Where you should select a fingerprint controller, then click OK button – **Controllers** dialogue box will be closed.







Click **Save** button to save parameters for Select device to issue identifier window, other wise click **Cancel** button.

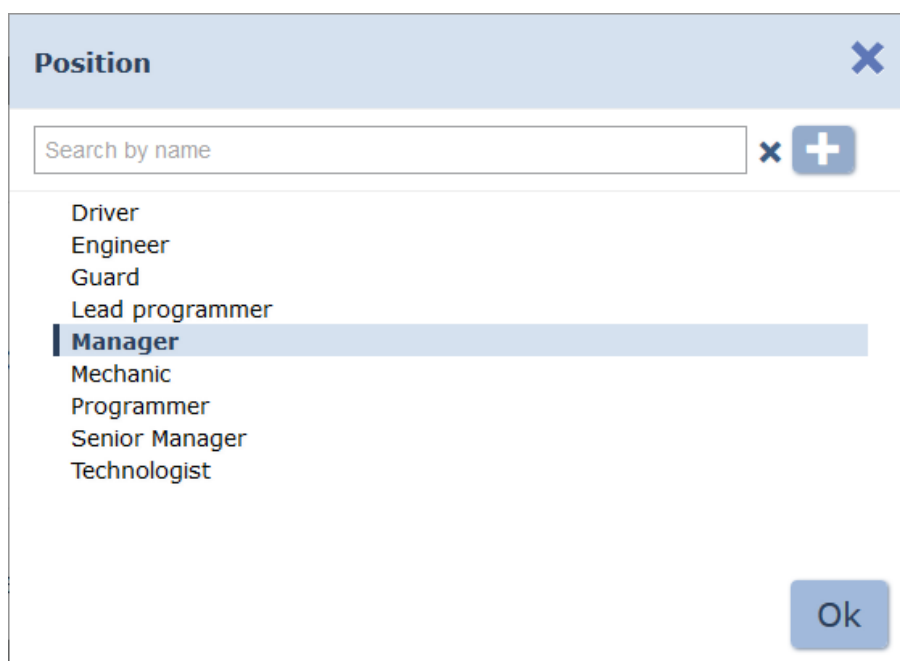
6. **Save** – click the button to save changes in the DB.






## New employee data entry

To add a new employee:

1. Go to  «**Staff**» section by using the navigation panel.
2. Open «**Employees**» subsection.
3. Switch to **Current** tab.
4. Click **Add**  on the toolbar. [Employee's registration card](#) window will appear.
5. Fill in the full name, middle name, employee ID in the correspondent fields.
6. Change the hiring date if needed. Click the button  on the right side of the **Date of hire** field: By default, the current date will be displayed.
7. Add photo and additional graphic data to employee's record. Choose from the **Images** drop down menu: type of graphic data and add images using **Upload from PC**  button.
8. Indicate the following data: **Department, Position, Work schedules, Access template**. Click **Select from list**  button on the right side of the correspondent field. In the appeared window select or create the correspondent value using **Add**  button, click **Ok**. Window overview:






9. Change the effective date if needed. Click the button  on the right side of the **Valid from:** field. The current date is set by default.

10. Set the selector at the bottom of the window in **Additional data** position and enter additional text information if needed.
11. Set the selector at the bottom of the window in **ID Card** position and issue **ID Card**. Click **Issue card**  on the right side of the **Card / identifier: field:**. Enter **ID card** number in the appeared **Issue card** window. [Read more](#).
12. Change the validity period of **ID Card** if needed. Click  on the right side of the **Valid until:** field. By default the card is valid for three years.
13. Click **Save** to apply all changes. **Employee's registration card** window will close. The data line will appear in the list of the selected department.





### Changing ID card validity period

To change the validity period:

1. Go to  «**Staff**» section by using the navigation panel.
2. Open «**Employees**» subsection.
3. Switch to **Current** tab.
4. Select the employee data line.
5. Click **Edit**  on the toolbar or double click on employee data line. [Employee's registration card](#) window will appear.
6. In the appeared window switch to **Access card** tab by using Additional data panel.
7. Click the button  on the right side of the **Valid until:** field and [change the date](#) of expiration.
8. Click **Save**. **Employee's registration card** window will close and ID Card date of expiration will change.



### ID Card temporary blocking

For employee(s) ID card blocking/ unblocking:

1. Go to  «**Staff**» section.
2. Open «**Employees**» subsection.
3. Switch to **Current** tab.
4. In the working area select the data line of one or more employees.
5. Click **Block**  / **Unblock**  on the page toolbar.
6. Click **Block/ Unblock** in the confirmation window. The sign  will appear/disappear in the lines of selected employees.



## ID Card withdrawal

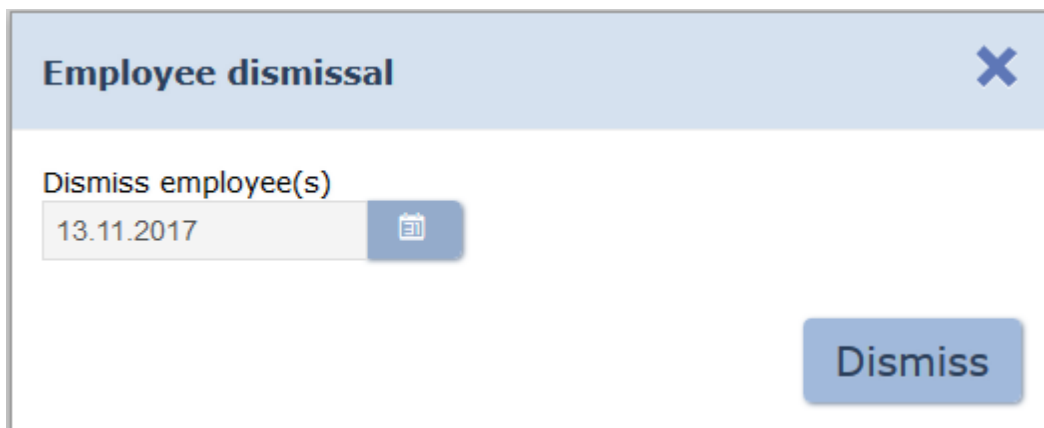
For ID Card withdrawal of one or more employees:

1. Go to  «**Staff**» section.
2. Open «**Employees**» subsection.
3. Switch to **Current** tab.
4. In the working area select the data line of one or more employees, whose ID Cards you would like to withdraw.
5. Click **Withdraw Card**  on the page toolbar.
6. Click **Withdraw** in the confirmation window. ID Cards of the selected employees will be withdrawn.

## Employee dismissal

To dismiss an employee:


1. Go to  «**Staff**» section.
2. Open «**Employees**» subsection.
3. Switch to **Current** tab.
4. Click **Dismiss**  on the page toolbar. **Employee dismissal** window will appear:








5. In the appeared window field **Employee dismissal** from [specify the date](#) of dismissal. Click **Dismiss**.
6. Employee's registration card will be moved to **Dismiss** tab within the specified date. Employee ID Card will be automatically withdrawn.

## Temporary change of employee data

For temporary change of employee data:

1. Go to  «**Employees**» section.
2. Open «**Staff**» subsection.
3. Switch to **Current** tab.
4. In the page working area select an employee, whose data has to be temporarily changed.

5. Click **Edit**  on the page toolbar. **Employee's registration card** window will appear.
6. Click **Planner**  button. The **Planner** window will appear. A table of data changes of the selected employee will appear in the window working area. The following tools are available:
-  – **Add** button allows you to add a new change.
  -  – **Edit** button allows you to edit the selected change.
  -  – **Delete** button allows you to delete the selected change.

Window overview:

Task scheduler <span style="float: right;">✕</span>			
+ ✎ -			
Credentials ▾	Start date	End date	Value
Position	10.11.2017		Senior Manager
Work schedule	10.11.2017		5/2 10.00-19.00
Access template	10.11.2017		For employees
Blocking	10.11.2017		Unlocked card

Ok

7. Click **Add**  button. **Add data change event / temporary replacement interval** window will appear:

Add data change event / temporary replacement interval <span style="float: right;">✕</span>			
Department ▾	06.11.2017 	-	17.11.2017  ✕
			Technology Department 

Ok

8. In the appeared window select the type of data that will be changed, change period and the changes itself.

**Add data change event / temporary replacement interval** [X]

Department ▾ 06.11.2017 [Calendar] - 17.11.2017 [Calendar] X Technology Department [List Icon]

[Ok]

9. Click **Ok** upon completion. Personal data changes will be displayed in the Planner window in table or in graphic view.

**Important:**

It is necessary to specify the amount of change days to be multiple of timetable shift days. Otherwise, the last change date remains unfinished and causes to errors in working time logging reports.

**Example of Morealculation**

For example, the following change is created for employee:

**Schedule editing** [X]

Schedule name : From 18.30 to 8.30

Schedule type: Shift ▾

Schedule description: [Empty]

Intervals  Recording rooms  Report settings

[+/-] Shift start date: 06.11.2017 [Calendar]

**Day 1** Working hours: 05h 30m  
Timeline: 18:30 →

**Day 2** Working hours: 08h 30m  
Timeline: ← 08:30

**Day 3** Working hours: 00h 00m  
Timeline: [Empty]

[Save]

For the period from 02.04.2017 to 08.04.2017. The temporary change period is 7 days, and the duration of one shift is 3 days. Consequently, the last shift is reduced that leads to miscalculations in the working time log.



## Window overview:

Worked time log												
Supporting documents												
Discipline reports												
01-04-2017 30-04-2017 Department: Technology department Search												
Employees	Employee ID	Position	Department	Presence	Working hours	Absence	Night work	Overtime	Balance of worked time	Supporting documents with the addition of working time	Documents without adding time / Overtime	Work schedule
Smith John		Senior Managi	Technology depart			168:30			-168:30			From 10.00-19.00
01-04-2017, Sat		Senior Managi	Technology depart									From 10.00-19.00
02-04-2017, Sun		Senior Managi	Technology depart			14:00	<-- First day of change		-14:00			From 18.30 to 8.30
03-04-2017, Mon		Senior Managi	Technology depart				<-- Second day of change					From 18.30 to 8.30
04-04-2017, Tue		Senior Managi	Technology depart				<-- Third day of change					From 18.30 to 8.30
05-04-2017, Wed		Senior Managi	Technology depart			14:00	<-- First day of change		-14:00			From 18.30 to 8.30
06-04-2017, Thu		Senior Managi	Technology depart				<-- Second day of change					From 18.30 to 8.30
07-04-2017, Fri		Senior Managi	Technology depart				<-- Third day of change					From 18.30 to 8.30
08-04-2017, Sat		Senior Managi	Technology depart			05:30	<-- First day of change	Calculation error	-05:30			From 18.30 to 8.30
09-04-2017, Sun		Senior Managi	Technology depart				<-- Second day of change					From 10.00-19.00
10-04-2017, Mon		Senior Managi	Technology depart			09:00	<-- Third day of change		-09:00			From 10.00-19.00
11-04-2017, Tue		Senior Managi	Technology depart			09:00			-09:00			From 10.00-19.00
12-04-2017, Wed		Senior Managi	Technology depart			09:00			-09:00			From 10.00-19.00

It is necessary to carefully calculate the data change period in order to prevent such errors and check that its duration is multiple of shift days amount.

## Supporting document issue

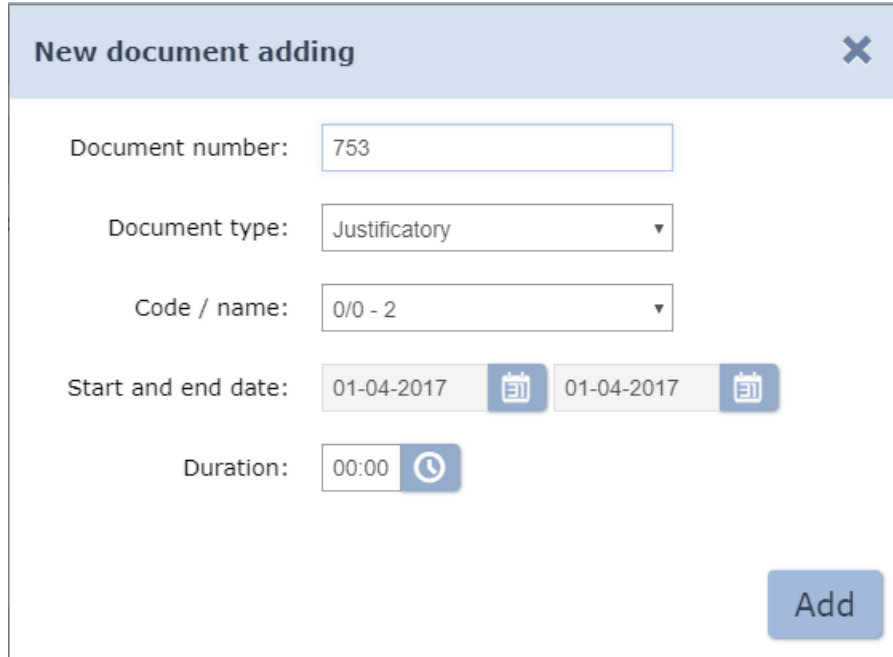
It is also possible to issue a supporting document or overtime document:

1. Go to  «**Staff**» section.
2. «**Employees**» subsection.
3. Switch to **Current** tab.
4. Select an employee from the working area.
5. Click **Edit**  button on the toolbar or double click on the data line of selected employee. **Employee's registration card** window will appear.
6. In the appeared window switch to **Supporting documents** tab:

Additional fields						
Supporting documents						
Access card						
Fingerprints						
document №	Document type	Name of the document	Duration	Document date	Start of the document	End of the document validity period
44	Justificatory	International doc	08:00	10.11.2017	10.11.2017	10.11.2017

**Save**





7. Click **Add** . **New document adding** window will appear:



8. Specify the document number in the correspondent field of the appeared window.
9. Select the document type using **Document type** drop down menu: choose document category.
10. From the **Code/name** drop down menu: select document tupe.
11. Fill in the correspondent fields the validity period of the document. Start and expiration dates must be the same in case of one-day document issuing.
12. In the **Duration** drop down menu specify the time period according to the one-day document.
13. Click **Add**. **New document adding** window will close. A document will appear on the additional information panel of the **Employee's registration card** window.
14. Click **Save**. **Employee's registration card** window will close.

### Print employee individual record

To print individual record of one or more employees:

1. Go to  «**Staff**» section.
2. Open «**Employees**» subsection.
3. Switch to **Current** or **Dismissd** tab, depending on on employee status.
4. Select employee department, click [Select from list](#)  on the right side of the **Department** field.
5. Select the data line of one or more employees, whose data has to be printed.
6. Click **More**  on the page toolbar, select **Print employee card** .

7. A new browser tab will appear with individual records of the selected employees. Employee selection panel is located on the left side of the page. The following data is available for printing:

- **General information**
- **Accounting data**
- **Additional text fields**
- **Additional graphic fields**
- **Access card**
- **Supporting documents**

8. Make sure that required data is checked on the panel.

9. Click **Print** at the bottom of the panel. Standard printing dialog box will appear.

#### 4.1.2 «Dismissed» tab

Tab overview:

Employee	Personnel number	Department	Position	Date of hiring	Termination date	Phone number	Photo
Baker Matthew Samuel	523	Administration	Senior Manager	04.09.2017	12.11.2017	347-517-5378	
Smith George Bill	56	Software Department	Programmer	10.11.2017	12.11.2017		

1. Subsection tab selector:

- **Current** – contains the list of employees.
- **Dismissd** – contains the list of fired employees.

2. Page toolbar panel:



**Restore** – click to reinstate one or more employees that are selected on the page working area. Employee data will be transferred to the **Current** tab.



**View** – click to open selected [Employee's registration card](#).



**Delete** – click to completely delete fired Employee's registration card. It is impossible to restore deleted data.



**Advanced Search** – click to apply filters to elements.









**Refresh the table** – click to refresh the data on the page working area.




**More** – click to open the menu of additional options:



-  [Print Employee card](#) – click to print Employee's registration card with photo and information about issued supporting documents.
-  [Table print](#) – click to print data from the page working area.
-  [Export into XLS](#) – click to save data from the page working area as *MS Office Excel* file with `.XLS` extension.
-  [Export into CSV](#) – click to save data from the page working area as *OpenOffice Calc* file with `.CSV` extension.
-  **Reset filters** – click to reset all filters. Employees of all departments will be displayed after resetting.
-  **Table display parameters**– select the columns to display on the page working area.

[Search](#) – search entry field.



[Select from list](#) – button on the right side of the **Department** field allows to select a Department and its employees to display on the page working area. Click **Reset**  to display all employees.



3. The page working area contains the list of fired employees of the Department that is selected on the toolbar.

**Important:**

It is possible to [Sort](#) data entries of one column, [change width](#) and [sequence](#).

## Reinstatement of employee

To reinstate a previously dismissed employee:

1. Go to  «**Staff**» section.
2. Open «**Employees**» subsection.
3. Switch to **Dismissd** tab.
4. Select one or more employees.
5. Click Restore  on the page toolbar. Data of the selected employees will be moved to **Current** tab.
6. Edit employee [individual record](#) data if needed.

## 4.2 «Work schedules» subsection

The following tabs are available:

[Work schedules](#) tab is used for:

- [creating weekly work schedules](#);
- [creating shift schedules](#);
- [creating schedules for presence](#);
- specifying premises of work time logging for every schedule;
- specifying parameters of labor discipline report generation for every schedule;
- changing and deleting of the previously created schedules.

**Important:**

Creation of schedules is used for work time logging and is not connected with time access parameters.

**Holidays** tab is used for [creating holidays calendar](#) for the current year.

**4.2.1 «Work schedules» tab**

*Working time interval* – employee has to stay on his workplace throughout the duration of the specified period. Working day can consist of several working intervals.

Page overview:

Title	Schedule type	Description
5/2 10.00-19.00	Weekly	With the exception of the garage
5/2 8.30-13.00 and 14.00-17.30	Weekly	Staff only
5/2 9.00-17.45	Weekly	
From 18.30 to 8.30	Shift	
The presence for the Marketing Department	According to the presence	For Office

1. Tab selector:

- **Work schedules**
- [Holidays](#)

2. Page toolbar:



**Add** – Click to create a new schedule.



**Edit** – Click to edit parameters of the selected schedules displayed on the page working area.



**Copy** – Click to create a new schedule, based on the selected schedule.



**Delete/Restore** – click to delete the selected schedule. The schedule will not be deleted but hidden, if it has been previously applied to any employee. Click the button to restore the selected hidden schedule. Use the **Show hidden** checkbox to display hidden schedules.

**Search** – entry field for search performing through elements of the page working area. Click **Reset** to clear the field.

**Night time from... till...** – entry field for time period which will be considered as night and will affect report generation.

**Show hidden** – click to display all previously hidden schedules (such schedules are marked grey).

- Page working area of the subsection contains the list of the previously created schedules and includes time and description. It is possible to [Sort](#) data entries of one column, [change width](#) and [sequence](#).

### «Work schedule adding» window

**Add (Edit, Copy) work schedule** window can be called by clicking **Add (Edit, Copy)** buttons and is used for creating a new work schedule (editing, copying parameters of previously created schedules). **Work schedule adding** window can be also called by double clicking the line of the selected schedule. Overview of the working area (depends on selected work schedule):

The screenshot shows the 'Work schedule adding' window. At the top, there is a title bar with the text 'Work schedule adding' and a close button (X). Below the title bar, there are three input fields: 'Schedule name', 'Schedule type' (set to 'Weekly'), and 'Schedule description'. Below these fields, there are three radio buttons: 'Intervals' (selected), 'Registering rooms', and 'Report settings'. The main area shows three days: Monday, Tuesday, and Wednesday. Each day has a 'Working hours: 0h 0m' label and a horizontal bar representing the schedule. A 'Save' button is at the bottom right.

- Window toolbar contains the following elements:
  - Schedule name** – entry (change) field used for schedule naming.
  - Schedule description** – field used for entry (change) schedule additional information.
  - Schedule type** – the drop down menu can be used to select one type of schedule:
    - **Weekly;**
    - **Shift;**
    - **By presence.**
- Window tab selector:
  - **Intervals** – tab is used for specifying work time intervals (unavailable for **By presence** schedule).
  - **Registering rooms** – tab is used for specifying the logging premises.

- **Report settings** – tab is used for specifying a minimum duration of violation that will be included in «**Discipline report**» from the «**Time & Attendance**» section.

3. Overview of the working area depends on the selected tab.

### «Intervals» tab

Overview of the working area (depends on selected work schedule):

**Work schedule adding** ✕

Schedule name :

Schedule type:

Schedule description:

Intervals    Registering rooms    Report settings


**Monday** Working hours: 08h 00m


09:00 14:00 18:00


Shift start 13:00

**Tuesday** Working hours: 00h 00m

**Wednesday** Working hours: 00h 00m

 **Add day** – allows you to add one more day in the shift schedule. Number of days can't exceed 30.

 **Delete day** – used for deleting selected day of the shift schedule.




**Shift start date:** – field is used for [date entry](#) of the first day of shift schedule. Click  to entry date on the right side of the field.

The time scale is displayed in the working area. Configure the working interval using the time scale:

- Hold mouse left button and select the range on a time scale.

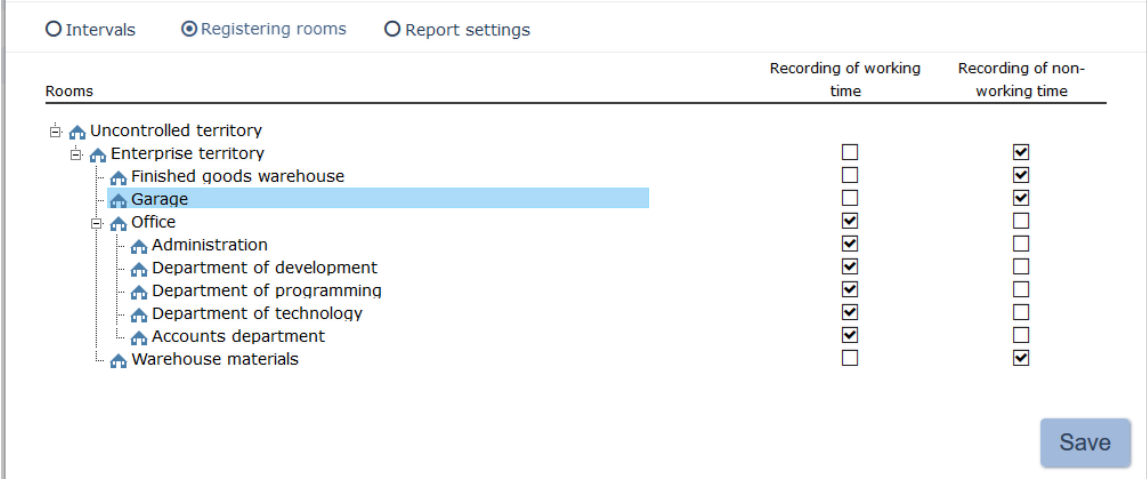
#### **Important:**

- Duration of one interval must be more than 3 minutes and less than 24 hours.
- Intervals must not overlap.
- Interval of the **weekly** schedule can't start earlier than 00:30 and finish later than 23:30.
- Interval of the **shift** schedule can start in one day and finish next.

- Interval can start on last day and finish on first day of the shift.
- All calculations are made strictly within calendar day limit for days that don't have shift to next (previous) day interval.
- Set one of the following parameter for each interval using the drop down menu:
  - **Full work shift**– can be the only variant of working day.
  - **Shift start** – is the first interval of working day.
  - **Intermediate interval**– interval that is placed between the first and the last intervals of the working pattern. It is possible to have several interim intervals.
  - **Shift end** – is the last interval of the working day or shift.
- Select interval on the time scale by clicking mouse left button and *edit interval* using sliders.
- For interval deleting, select an interval on the time scale by clicking mouse left button and click **Remove the selected interval**  or use **Del** button on the keyboard.
- To duplicate an interval to another day or schedule: select an interval and click **Copy interval** . Then select the day line where you want to paste it and click **Paste interval** .

### «Registering rooms» tab

Tab overview:



Rooms	Recording of working time	Recording of non-working time
Uncontrolled territory		
Enterprise territory		<input checked="" type="checkbox"/>
Finished goods warehouse	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Garage	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Office	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Administration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Department of development	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Department of programming	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Department of technology	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Accounts department	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Warehouse materials	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Recording of working time**– the premise is used for the time logging when ticked.

**Recording of non-working time** – the premise is used for nonworking time logging when ticked.

## Tab «Report settings»

Tab overview:

**Not to consider holidays** (only for weekly schedules) – all violations during selected days in Holidays tab will be included in the report of «Discipline report» subsection.

**Consider only the first entrance and the last exit** – exits from registering rooms during the working day will not be included in T&A report.

**Not consider as a violation, allow late-in for no more than** – if time of late attendance is less than specified, it will not be considered in «Violators» report.

**Not consider as a violation, allow early-out for no more than** – if time of early leaving is less than specified, it will not be considered in «Violators» report.



**Not to consider violations of less than** – if total time of violations (late attendance, early leaving, absences during the working day) is less than specified, it will not be considered for worked time calculation.

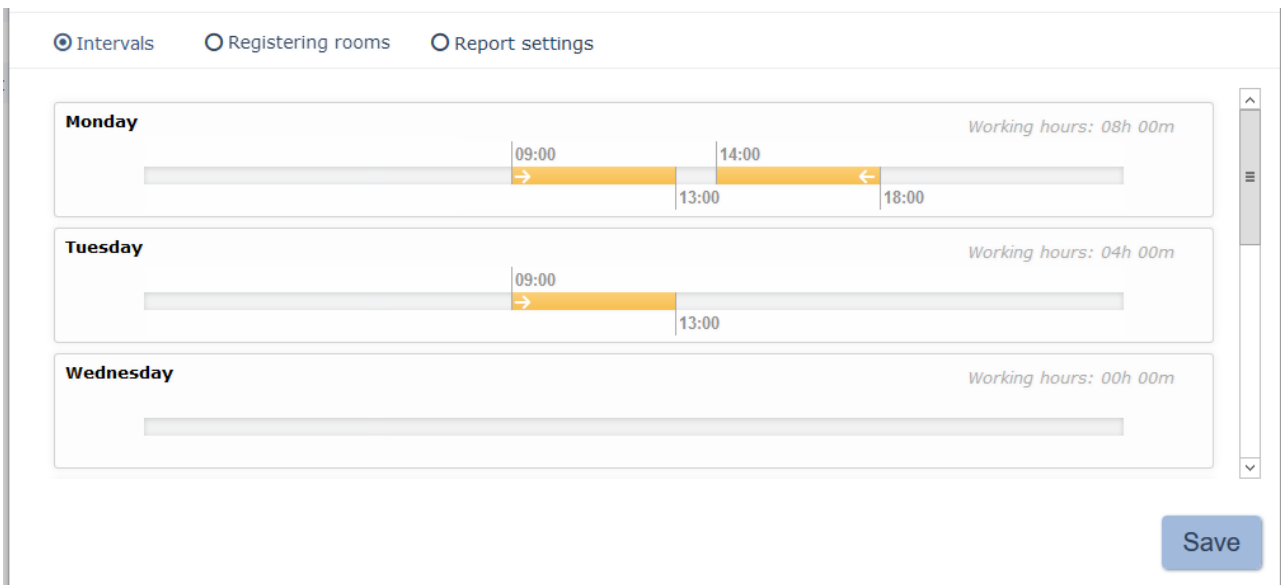
**Not to consider overtime less than** – if total overtime period (early arrival and leaving after the end of working day) is less than specified, overtime will not be considered for worked time calculation.

4. **Save** button.

## Create a weekly work schedule

To create a new schedule:

1. Go to  «**Staff**» section.
2. Open «**Work schedules**» subsection.
3. Switch to **Work schedules** tab.
4. Click **Add**  on the page toolbar. **Work schedule adding** window will appear.
5. In the appeared window enter a name for a new schedule in the **Schedule name** field, enter additional information in the **Schedule description** field if needed.
6. Select **Weekly** schedule using the **Schedule type** drop down menu. Tab **Intervals** will become as follows:





The screenshot shows the 'Intervals' tab of the 'Work schedule adding' window. It displays three days: Monday, Tuesday, and Wednesday. Each day has a horizontal timeline with working intervals highlighted in orange. Monday has two intervals: 09:00 to 14:00 and 13:00 to 18:00, with a total of 08h 00m. Tuesday has one interval: 09:00 to 13:00, with a total of 04h 00m. Wednesday has no intervals, with a total of 00h 00m. A 'Save' button is located at the bottom right.

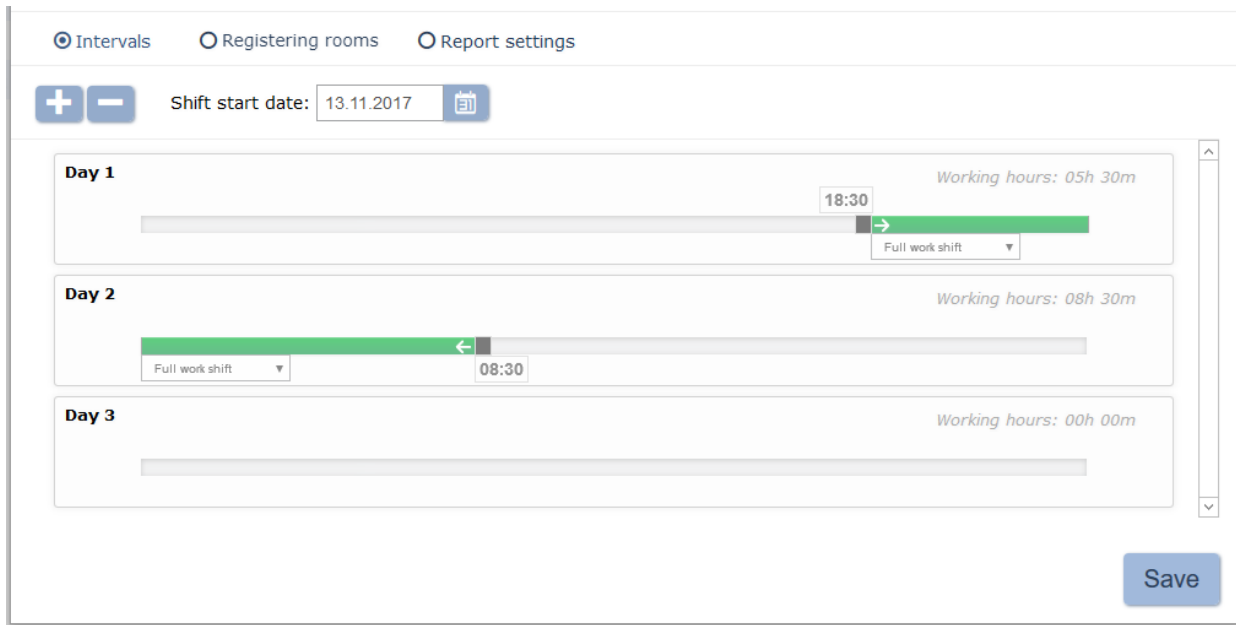
7. The lines on the tab refer to days of the week. Specify the desirable amount of working intervals for every day of the week using the time scale.
8. Switch to **Registering room** tab. Check off the premises that will be used for working and nonworking time calculation according to created schedule.
9. Switch to **Report settings** tab and configure the labor discipline report generation parameters for the created schedule.
10. Click **Save**. **Work schedule adding** will close. A new schedule will be added to the subsection working area.




## Create a shift work schedule

To create a new schedule:

1. Go to  «**Staff**» section.
2. Open «**Work schedules**» subsection.
3. Switch to **Work schedules** tab.


4. Click **Add**  on the page toolbar. **Work schedule adding** window will appear.
5. In the appeared window enter a name for a new schedule in the **Schedule name** field, enter additional information in the **Schedule description** field if needed.
6. Select the **Shift** schedule by using the **Schedule type** drop down menu. Tab **Intervals** will become as follow:




7. The lines on the tab refer to the shift days. Three days schedule will be created by default. Specify the desirable amount of shift days using **Add day**  and **Delete day**  buttons.
8. Specify the desirable amount of working intervals for every shift day.
9. Set date of the first day of the shift schedule. Click  on the right side of the **Shift start date** field. Specify the desirable date in the appeared calendar.
10. Switch to **Registering room** tab. Check off the premises that will be used for working and nonworking time registration, according to created schedule.
11. Switch to **Report settings** tab and configure the labor discipline report generation parameters for the created schedule.
12. Click Save. Work schedule adding window will close. A new schedule will be added to the subsection working area.

### Creating By presence schedule

To create a new schedule:

1. Go to  «**Staff**» section.
2. Open «**Work schedules**» subsection.
3. Switch to **Work schedules** tab.



4. Click **Add**  on the page toolbar. [Work schedule adding](#) window will appear.
5. In the appeared window enter a name for a new schedule in the **Schedule name** field, enter additional information in the **Schedule description** field if needed.
6. Select **By presence** schedule by using the **Schedule type** drop down menu. The **Registering rooms** tab will appear:

Registering rooms
 Report settings

Rooms	Recording of working time	Recording of non-working time
🏠 Uncontrolled territory		<input checked="" type="checkbox"/>
🏠 Enterprise territory	<input type="checkbox"/>	<input checked="" type="checkbox"/>
🏠 Finished goods warehouse	<input type="checkbox"/>	<input checked="" type="checkbox"/>
🏠 Garage	<input type="checkbox"/>	<input checked="" type="checkbox"/>
🏠 Office	<input checked="" type="checkbox"/>	<input type="checkbox"/>
🏠 Administration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
🏠 Department of development	<input checked="" type="checkbox"/>	<input type="checkbox"/>
🏠 Department of programming	<input checked="" type="checkbox"/>	<input type="checkbox"/>
🏠 Department of technology	<input checked="" type="checkbox"/>	<input type="checkbox"/>
🏠 Accounts department	<input checked="" type="checkbox"/>	<input type="checkbox"/>
🏠 Warehouse materials	<input type="checkbox"/>	<input checked="" type="checkbox"/>

7. Check off the premises that will be used for working and nonworking time calculation according to created schedule.
8. Switch to [Report settings](#) tab to configure the labor discipline report generation parameters for the created schedule.
9. Click **Save**. **Work schedule adding** window will close. A new schedule will be added to the subsection working area.

## 4.2.2 «Holidays» tab

Page overview:

The screenshot displays the «Holidays» tab interface. At the top, there are two tabs: «Work schedules» and «Holidays». Below the tabs is a toolbar with three icons: a calendar, a document with an arrow, and a trash can. To the right of the toolbar is a year selector dropdown menu set to 2017. The main area contains a 12-month calendar grid. Each month's calendar shows days of the week (Mon-Sun) and dates. Days are color-coded: red for holidays, pink for pre-holiday days, green for working holidays, and gray for notes. A legend at the bottom explains the color coding: Red - Holiday, Pink - Pre-holiday day, Green - Working holiday, Gray - Note.

1. Tab selector:

- [Work shedeles](#);
- **Holidays.**

2. Page toolbar:



[Predefined holidays calendar](#) – button allows you to preset dates of annual holidays for quick later use.



**Fill with predefined values** – button allows you to fill in the holidays of the selected calendar according to predefined values.



**Delete** – click to delete all previously added holidays from the selected calendar.


The drop down menu allows you to select year that will be displayed on the page working area.

3. Page working area contains calendar for a year that is selected on the toolbar. Calendar days are marked depending on its type:

- Red* – hollyday;
- Pink* – pre-hollyday (short day);
- Gray* – note;
- Green* – working holiday.

### Creation of predefined values calendar

To add new days to calendar:

1. Go to  «**Staff**» section.
2. Open «**Work schedules**» subsection.
3. Switch to **Holidays** tab.

4. Click **Predefined holidays calendar**  on the page toolbar. **Predefined holidays calendar** window will appear:

**Predefined holidays calendar**
✕

+
-

Day	Month	Name of the holiday
10	July	
4	March	ey
11	August	
2	January	
1	January	

Save

5. In the appeared window click **Add**  to add a holiday. **Add holiday** window will appear:

**Add holiday**
✕

Month:

Day:

Name:

Save



6. Specify month, day and holiday name in the correspondent fields of the appeared window. Click **Save**. **Add holiday** window will close, and holiday will be added to the **Predefined holidays calendar** list.

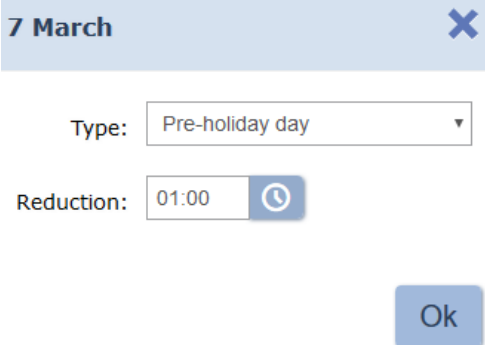
7. To delete a holiday: select it and click **Delete** .


8. To apply changes to the **Predefined holidays calendar**: click **Save**. **Predefined holidays calendar** window will close.

## Creation of holidays calendar


To create a holidays calendar for the current year:



1. Go to  «**Staff**» section.
2. Open «**Work schedules**» subsection.
3. Switch to **Holidays** tab.
4. Select the desirable year using the toolbar drop down menu.
5. [Create or edit the predefined holidays calendar](#).
6. Click **Fill in with predefined values**  button on the page toolbar. The system will display all holidays from the predefined holidays calendar.
7. Edit the calendar if needed. In the working area click on the day you want to edit. A window that contains information about the selected day will appear:



7 March 

Type:

Reduction:  

8. In the appeared window select **Type**:
  - **Regular day**;
  - **Holiday**;
  - **Pre-holiday day**;
  - **Note**;
  - **Working holiday** (available if a weekend day is selected).
9. If selected **Type: Holiday** or **Note**, then add additional information in the **Name** field if needed.
10. If selected **Type: Pre-holiday day** or **Working holiday**, then specify the time this day will be reduced. Click  on the right side of the **Reducing value** field.
11. If selected **Type: Working holiday**, then specify the date to transfer the day off. Click  on the right side of the **Transfer date** field.
12. Click **Ok** after specifying desirable parameters. The window will close. The day will be marked with type correspondent color.

### 4.3 «Departments» subsection


Subsection is used for:


- [Creating the list of departments](#) and configuring each schedule:
  - employee working schedule;
  - employee access template;
  - visitors access template;
  - attendant for visitor;
- [importing the list of departments](#) from `.XLS`, `.XLSX` or `.CSV` spreadsheets files;
- editing and deleting of the previously added data of the departments.


Subsection page overview:


The screenshot displays the 'Departments' subsection interface. At the top, there is a toolbar with icons for adding (+), editing (pencil), deleting (-), and a menu (hamburger icon). A search bar is present with a 'Show hidden' checkbox. The main area is divided into two columns. The left column shows a tree view of departments under 'Office', including 'Software Department', 'Technology Department', 'Administration', 'Accounts department', and 'Programming Department'. The right column contains a form for editing a department, with fields for 'Telephone' (54-22-16), 'Description', 'The default values' (4), 'Accompanying' (Undefined), 'Employees access template' (For employees), 'Visitors access template' (For visitors), and 'Work schedule' (5/2 9.00-17.45). Callouts 1, 2, 3, and 4 point to the search bar, the department list, the telephone field, and the 'The default values' section, respectively.





1. Page toolbar:


 **Add Department** – click to add a new department to the list. A new department will be added to the other if it is selected on the page working area.

 **Edit Department** – click to change the name and parameters for the selected department.

 **Delete/Restore Department** – click to delete the selected department (including all enclosed). If any employee has been added to the selected department, then it will become hidden and will not be deleted. This button helps to restore the hidden department if it is selected on the working area. Hidden departments are displayed on the page working area when the **Show hidden** option is ticked.

 **More** – click to open command menu:

-  **Table print** – allows to print data from the working area.
-  **Export into XLS** – allows to save data from the working area to *MS Office Excel* file with `.xls` extension.
-  **Export into CSV** – allows to save data from the working area to *OpenOffice Calc* file with `.csv` extension.
-  **Import from XLS, XLSX, CSV** – allows to import employees data from spreadsheet files with `.XLS`, `.XLSX` or `.CSV` extensions.

**Search** – input field for data to search. Click **Reset**  to clear the field.

**Show hidden** – click to display all previously hidden departments (such departments are marked grey).

2. Page working area contains hierarchical list of premises.

**Important:**



Drag&Drop technology can be used for rearranging the list of premises.

3. **Text data** panel contains entry fields for additional reference data of the selected department (telephone number and short description).
4. **Default settings** panel. The following parameters can be set as default for visitors and employees for every department:
  - **Accompanying:** an employee of the department who is responsible to be in attendance with visitors.
  - **Employees Access template:** access permissions template that is applied to employees ID cards.
  - **Visitors Access template:** a template of access permissions that are applied to visitors ID cards of the selected department.
  - **Work schedule:** indicated schedule is automatically applied to the department employee during employment procedure.

### 4.3.1 Creating the list of departments

While organizing the facility structure or several root elements that refer to big departments, territorial administrations or branches of the company, it is recommended to create a root element that will have the same name as the company.

To create a department drop down list:

1. Go to  «**Staff**» section.
2. Open «**Departments**» subsection.
3. Click **Add Department**  on the page toolbar. **Department editing** window will appear:

**Department editing**
✕

Name:

---

**The default values**

<p>Accompanying:  <input style="width: 100%; border: 1px solid #ccc;" type="text" value="Bakers Matthew Samuel"/> <span style="float: right; border: 1px solid #ccc; padding: 2px 5px;">☰ ✕</span></p> <p>Employees access template:  <input style="width: 100%; border: 1px solid #ccc;" type="text" value="For employees"/> <span style="float: right; border: 1px solid #ccc; padding: 2px 5px;">☰ ✕</span></p> <p>Visitors access template:  <input style="width: 100%; border: 1px solid #ccc;" type="text" value="For visitors"/> <span style="float: right; border: 1px solid #ccc; padding: 2px 5px;">☰ ✕</span></p> <p>Work schedule:  <input style="width: 100%; border: 1px solid #ccc;" type="text" value="5/2 10.00-19.00"/> <span style="float: right; border: 1px solid #ccc; padding: 2px 5px;">☰ ✕</span></p>	<p>Telephone:  <input style="width: 150px;" type="text" value="55-021"/></p> <p>Description:  <input style="width: 150px; height: 20px;" type="text"/></p>
--	--

4. In the appeared window specify the name in the **Name** field. Use the **Description** field for entering additional information like telephone number and additional reference information.

5. Use **Select from list**  buttons on the right side of the correspondent fields and specify data that will be used for employees/visitors by default:

**Accompanying** – an employee of the department who is responsible to be in attendance with visitors.

**Employee access template** – access permissions template that will be applied to employees ID cards.

**Visitors access template:** a template of access permissions that are applied to visitors ID cards of the selected department.

**Work schedule:** indicated schedule will be automatically applied to department employee during employment.


**Important:**

- Access templates for employees and visitors can be created in the «**Access templates**» subsection of «**Pass Office**» section.
- Work schedules for employees can be created in «**Work schedule**» subsections of the «**Staff**» section.

6. Click **OK** after you finished data entry. Window will close, and created department will be added to page working area.

7. Add another departments of the same level if needed.

8. To add an enclosed department to the previously created structure: select the department on the page working area and click **Add**

**Department**  on the page toolbar. **Department editing** window will appear.

9. In the appeared window specify the name and default parameters for the department.

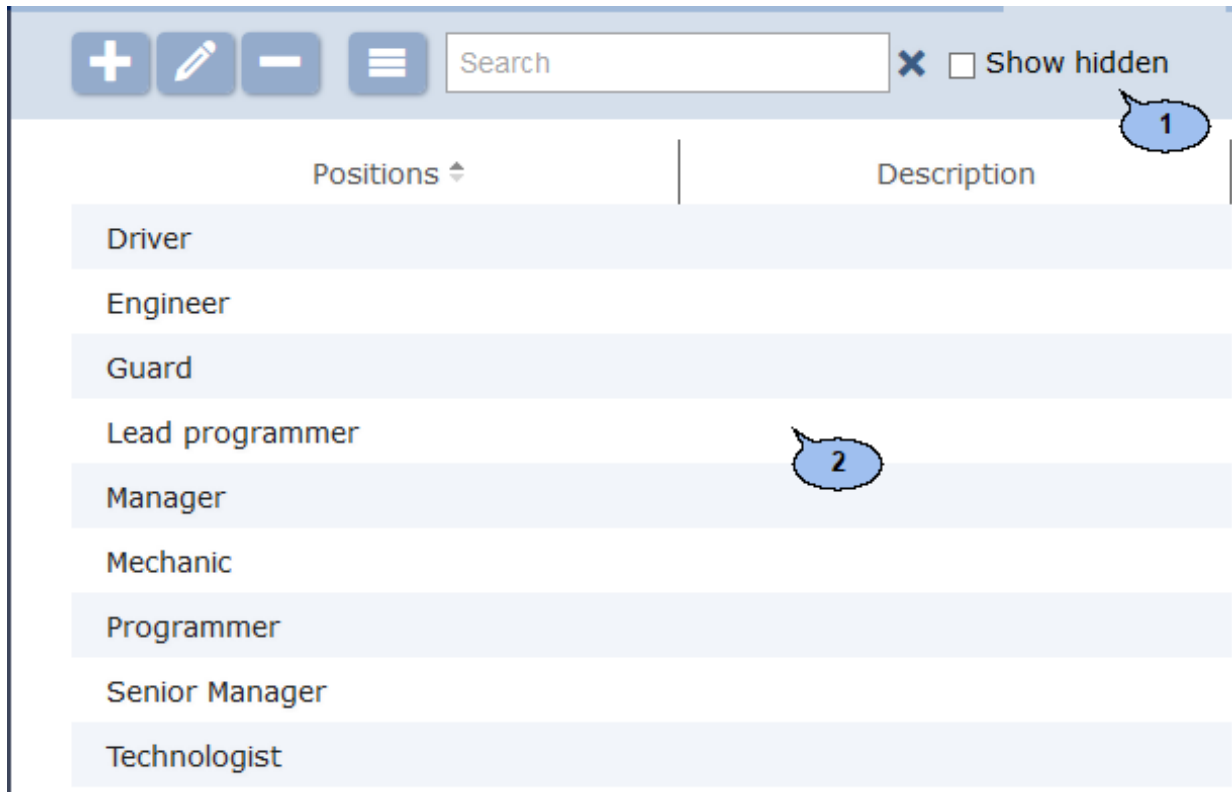
10. Click **OK** after finishing. Window will close, and the new department will be added to the page working area.

## 4.4 «Positions» subsection

Subsection is used for:

- [creating the list of positions](#);
- [importing list of positions](#) from spreadsheet files with *.XLS*, *.XLSX* or *.CSV* extensions;
- editing and deleting the previously added positions.

Subsection overview:



1. Page toolbar:



**Add Position** – click to add new position to the list.





**Edit Position** – click to change the name and the description of the position that is selected on the page working area.





**Delete/ Restore Position** – click to delete selected position. The position will not be deleted but hidden, if it has been previously applied to any employee. Click the button to restore the selected hidden position. Use the **Show hidden** check box to display hidden positions.




**More** – click to open command menu:

-  [Table print](#) – allows you to print data from the page working area.
-  [Export into XLS](#) – allows you to save data from the working area to MS Office Excel file with *.xls* extension.



-  **Export into CSV** – allows you to save data from the working area to OpenOffice Calc file with .csv extension.
-  **Import from XLS, XLSX, CSV** – allows to import the list of positions from spreadsheet files with .XLS, .XLSX or .CSV extensions.



**Search** – Input field for data to search. Click **Reset**  to clear the field.


**Show hidden** – click to display all hidden positions (such departments are marked grey).

2. The page working area contains the list of all positions and includes the description. You can sort elements from one of the columns.

#### 4.4.1 Creating the list of positions

To create a list of approved positions:

1. Go to  «**Staff**».
2. Open «**Employees**» subsection.
3. Click **Add Position**  on the page toolbar. **Add Position** window will appear:



The screenshot shows a dialog box titled "Add position" with a close button (X) in the top right corner. Inside the dialog, there are two text input fields. The first field is labeled "Position:" and contains the text "Lead engineer". The second field is labeled "Description:" and contains the text "Group strategic development". At the bottom right of the dialog, there is a blue button labeled "Save".

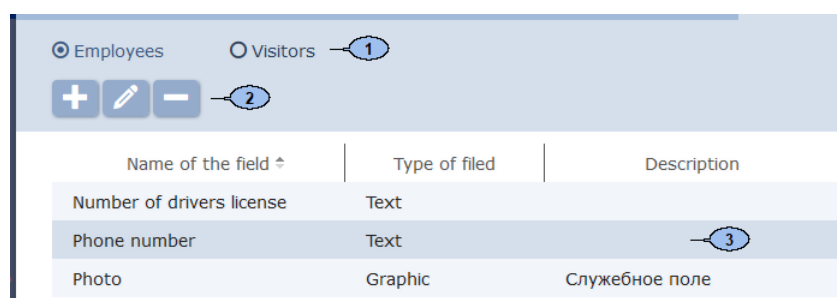
4. In the **Position** field specify the name of the position. Use the **Description** field to enter additional reference information. Click **Save**. The position will be added to the list.
5. Repeat the procedure in order to add additional positions to the list. It's impossible to create two positions with the same name. The warning window will appear if the created position is already in the list.

#### 4.5 «Additional data» subsection

Subsection is used for:

- [creating additional entry fields](#) for text and graphic data in [Employee's registration card](#) and **Visitor individual record**;
- editing and deleting the previously created additional entry fields.

Subsection overview:



1. Subsection tab selector:

- **Employees;**
- **Visitors.**

2. Page toolbar:



**Add field** – click to add additional field for text and graphic data in **Employee's registration card** or **Visitor individual record**.



**Edit field** – click to edit the name or description of the selected field.





**Delete field** – click to delete the selected field.

3. The page working area contains the list of additional entry fields for **Employee's registration card** or **Visitor individual record**. You can sort elements from one of the.

#### 4.5.1 Creation of the additional information field

To create additional entry fields for **Employee's registration card** or **Visitor individual record**:

1. Go to  «**Staff**» section..
2. Open «**Additional data**» subsection.
3. Select **Employees** or **Visitors** category using the subsection tab selector.
4. Click **Add field**  on the page toolbar. **Add field** window will appear:

**Add field**
✕

Name of the field:

Type of field:

Description:

5. In the appeared window specify the field name for Additional data, if needed.
6. Specify the **field type** of Additional data using the drop down menu: **Text** or **Graphic**.
7. Click **Save. Add field** window will close, the name of the field will be added to the list. The newly created field will appear in **Employee personal record (Visitor individual record)**. The field can be found on **Additional fields** tab if the selected type is text field or in the **Images** drop down menu if the selected field type is graphic.

## 5 «Pass office» section

The section is used for organizing WKS for employees of the «**Pass Office**» or security service staff. This section helps to automate the pass issue procedure.

### 5.1 «Visitors» subsection

The following tabs are available in this subsection:

**Ordered** tab is used for:

- [issuing a previously Ordered Visitor ID Card](#) in «**Pass office**» section;
- [importing the list of visitors](#) from the spreadsheet files with *.XLS*, *.XLSX* or *.CSV* extensions;
- granting/ changing visitors permissions based on previously created access template;
- scanning visitors fingerprints for later authentication;
- [printing visitors pass based on selected design template](#).

**Current** tab is used for:

- [issuing ID Card for visitors](#);
- [importing the list of visitors](#) from the spreadsheet files with *.XLS*, *.XLSX* or *.CSV* extensions;
- granting/ changing visitors permissions based on previously created access template;
- temporary blocking /unblocking a visitors ID Card;
- scanning visitors fingerprints for later authentication;
- [printing visitors pass based on selected design template](#);
- generating reports on previously issued visitors ID Cards.

**Archive** tab is used for:

- [visitor ID Card reissuing](#);
- [importing list of visitors](#) from the spreadsheet files with *.XLS*, *.XLSX* or *.CSV* extensions;
- granting/ changing visitors permissions based on previously created access template;
- [printing visitors pass based on the selected design template](#).

## 5.1.1 «Ordered» tab

Page overview:

The screenshot shows the 'Ordered' tab interface. At the top, there are three tabs: 'Ordered' (selected), 'Current', and 'Archive'. A toolbar contains icons for adding, editing, deleting, searching, issuing cards, and refreshing. A search bar is set to 'Administration'. Below the toolbar is a table with the following columns: Visitor, Card, Document, Document number, Where (department), Accompanying, Access template, Order date, Valid until, and Photo.

Visitor	Card	Document	Document number	Where (department)	Accompanying	Access template	Order date	Valid until	Photo
Hayes Daniel		passport	jd-544-855	Administration	Bakers Matthew Samuel	For visitors	13.11.2017 13:32:19	16.11.2017 23:45:00	
Hughes Joshua		passport	jk-586-921	Administration		For visitors	13.11.2017 13:28:07	13.11.2017 23:45:00	
Stewart Andrew		Diver license	54-687-258	Administration	Bakers Matthew Samuel	For visitors	13.11.2017 13:26:37	14.11.2017 23:45:00	

Tab selector:

- **Ordered**
- **Current**
- **Archive**

1. Page toolbar:



**Add** – click to add a visitor, enter data or issue an ID Card.



**Edit** – click to edit visitors account information.



**Delete** – click to move selected data to archive.



**Advanced search** – click this button to use additional filters for the selected elements.



**Issue card** – click to issue card for employee, that is selected on the page working area.

***Important:***

The number is set according to the parameters that are applied in Administration -- Controller general parameters-- Readers operation mode. The Card number is defined by Generation of number parameter when With card recording is applied for the Protected area reading parameter:

Manual input – selecting this options allows you to enter the number manually;

Random number – selecting this option will automatically generate a Random number;

In ascending order – this option will generate a number by using an internal algorithm.



**Cards printing** – click to print a pass for the selected visitor.



**Refresh the table** – click to refresh data that is displayed on the page working area.



**More** – click to open command menu:

- **Table print** – allows you to print data from the page working area.
- **Export into XLS** – allows you to save data from the working area to MS Office Excel file with .xls extension.
- **Export into CSV** – allows you to save data from the working area to OpenOffice Calc file with .csv extension.
- **Import from XLS, XLSX, CSV** – allows you to import list of positions from the spreadsheet file with .XLS, .XLSX or .CSV extensions.
- **Reset filters** – click to reset all filters.
- **Table display parameters** – select the columns that will be displayed on the page working area.

**Search** – search input field. Click **Reset** to display all Visitors.



**Select from list** – a button on the right side of the **Departments** field that allows you to display visitors of the selected departments.

- The page working area contains the list of visitors whose ID Cards have been booked but not issued yet.

**Important:**

Multiple selection, [sort](#), [width change](#) and sequence of the columns functions are available.

## 5.1.2 «Current» tab

Page overview:

The screenshot shows the 'Current' tab interface. At the top, there are three tabs: 'Ordered', 'Current' (selected), and 'Archive'. A toolbar contains icons for adding, editing, deleting, searching, locking, printing, refreshing, and a menu. The 'Where (department):' dropdown is set to 'Administration'. A search input field is present. Below the toolbar is a table with the following columns: Visitor, Card, Document, Document number, Where (department), Accompanying, Access template, Order date, Valid until, and Photo.

Visitor	Card	Document	Document number	Where (department)	Accompanying	Access template	Order date	Valid until	Photo
Hayes Daniel	587	passport	jd-544-85	Administration	Bakers Matthew Samuel	For visitors	13.11.2017 13:32:19	16.11.2017 23:45:00	
Hughes Joshua	561	passport	jk-586-92	Administration		For visitors	13.11.2017 13:28:07	13.11.2017 23:45:00	
Stewart Andrew	488	Diver license	54-687-2!	Administration	Bakers Matthew Samuel	For visitors	13.11.2017 13:26:37	13.11.2017 23:45:00	

- Tab selector:

- **Ordered**
- **Current**
- **Archive**

- Page toolbar:



**Add** – click to add a visitor, enter data or issue an ID Card.



**Edit** – click to edit visitors account information.



**Delete** – click to move selected data to archive.



**Advanced search** – click this button to use additional filters for the selected elements.



**Block** – click for ID Card temporary blocking.



**Unblock** – click to unblock a previously blocked ID Card.



**Find Card** – click to find a Card by its number from the list of previously issued Cards.










**Cards printing** – click to print Visitor pass that is selected on the page working area.



**Refresh the table** – click to refresh data.



**More** – click to open command menu:

-  **Table print** – allows you to print data from the page working area.
-  **Export into XLS** – allows you to save data from the working area to MS Office Excel file with .xls extension.
-  **Export into CSV** – allows you to save data from the working area to OpenOffice Calc file with .csv extension.
-  **Import from XLS, XLSX, CSV** – allows you to import the list of positions from spreadsheet files with .XLS, .XLSX or .CSV extensions.
-  **Reset filters** – click to reset all filters.
-  **Submit all the data to the controllers** – click to send access permissions data to controllers.
-  **Table display parameters**– select the columns that will be displayed on the page working area.

**Search** – search input field. Click **Reset**  to display all visitors.



**Select from list** – a button on the right side of the **Departments** field that allows to display visitors of selected departments.




3. The page working area contains the list of Visitors whose ID Cards have been booked but not issued yet.

***Important:***





Multiple selection, [sort](#), [width change](#) and sequence of the columns functions are available.

## Issuing card for visitor

To issue an ID Card:


1. Go to «**Pass Office**»  section.
2. Open «**Visitors**» subsection.
3. Switch to **Ordered** tab.
4. Select a Visitor on the page working area whom you will issue an ID Card to. Use the **Search** field and **Find**  button.
5. Click **Edit**  on the toolbar. **Visitor credentials** window will appear:

**Visitor credentials** ✕

<p>Last name: <input type="text" value="Hayes"/></p> <p>Name: <input type="text" value="Daniel"/></p> <p>Middle name: <input type="text"/></p> <p>Supporting document: <input type="text" value="passport"/></p> <p>Document number: <input type="text" value="jd-544-855"/></p>	<p>Where (department): <input style="border: none; background-color: #f0f0f0; padding: 2px 5px;" type="text" value="Administration"/> </p> <p>Accompanying: <input style="border: none; background-color: #f0f0f0; padding: 2px 5px;" type="text" value="Bakers Matthew Samuel"/>  ✕</p> <p>Access template: <input style="border: none; background-color: #f0f0f0; padding: 2px 5px;" type="text" value="For visitors"/>  ✕</p> <p>Valid until: <input style="border: none; background-color: #f0f0f0; padding: 2px 5px;" type="text" value="16.11.2017 23:45"/> </p> <p>Card: <input style="border: none; background-color: #f0f0f0; padding: 2px 5px;" type="text" value="587"/> </p>	<p>Images: <input style="border: none; background-color: #f0f0f0; padding: 2px 5px;" type="text" value="Photo"/> ▼</p> <div style="border: 1px dashed #ccc; padding: 5px; text-align: center;">  </div> <p style="text-align: center;"> </p>
--	---	--

Additional fields     Fingerprints

Save

6. Edit visitor data if needed.
7. Click **Issue card**  on the right side of the Card field to issue a Card. Enter the card number in the appeared **Issue card** window. [Read more](#).



**Important:**

The number is set according to the parameters that are applied in **Administration -- Controller general parameters-- Readers operation mode**. The Card number is defined by **Generation of number** parameter when **With card recording** is applied for the **Protected area reading** parameter:

**Manual input** – selecting this options allows to enter the number manually;



**Random number** – selecting this option will automatically generate a Random number;

**In ascending order** – selecting this option will generate a number using an internal algorithm.

8. For additional verification activation, switch to **Fingerprints** additional information panel. Add desirable amount of fingerprints and set the quality of scanning in the appeared panel.
9. Click **Save**. **Visitor credentials** window will close. Visitor information will be moved to **Current** tab till the expiration date of ID Card and then will be moved to **Archive** tab.

**Visitor card issue**

To issue visitor ID Card:

1. Go to «**Pass Office**»  section.
2. Open «**Visitors**» subsection.
3. Switch to **Current** tab.
4. Click **Add**  on the tab toolbar. **Visitor credentials** window will appear:

**Visitor credentials**

Last name: Hayes

Name: Daniel

Middle name:

Supporting document: passport

Document number: jd-544-855

Where (department): Administration

Accompanying: Bakers Matthew Samuel

Access template: For visitors





Valid until: 16.11.2017 23:45

Card: 587

Images: Photo

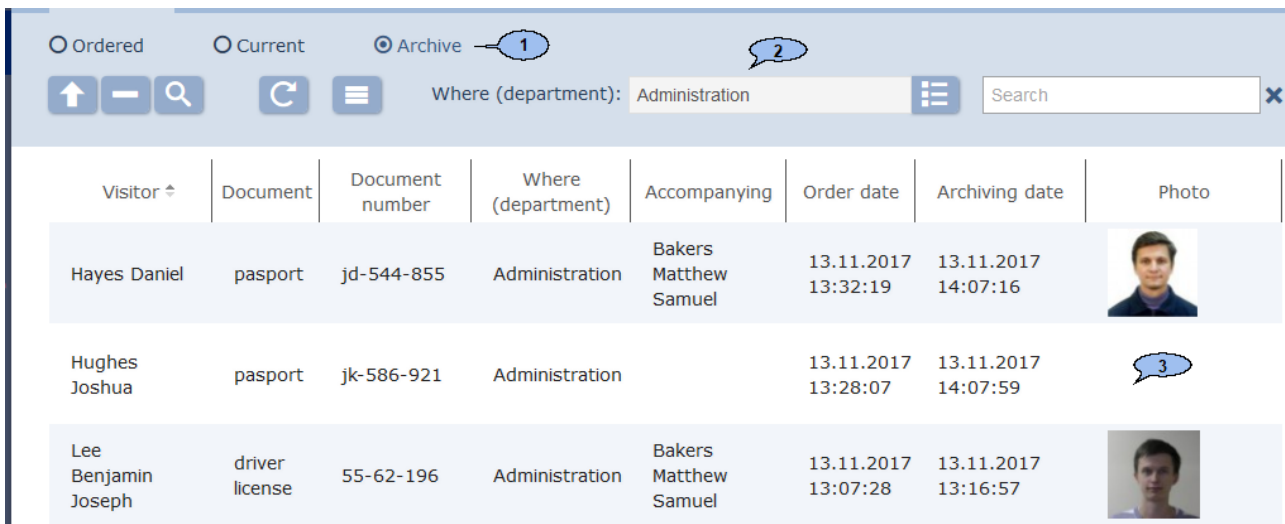
Additional fields  Fingerprints




Save

5. In the correspondent fields specify full name, type and number of a document.
6. Click [Select from list](#)  on the right side of the **Department** field and specify the Department where visitor goes.
7. Change visitor access template if needed. Click **Select from list**  on the right side of the **Access template** field. Select the mplate in the appeared **Access templates** window.
8. Add a photo and additional graphic data if needed. Select from the **Images** drop down menu: type of graphic data and add Images using [Upload from PC](#)  buttons.
9. Click **Select from list**  on the right side of the **Accompanying** field and specify one of the Department employees who will act as an attendant.
10. Add additional text data if needed.
11. To activate the additional verification: switch to [Fingerprints](#) additional information panel. Add desirable amount of fingerprints and set the quality of scanning in the appeared panel.
12. Click **Save. Visitor credentials** window will close. Newly entered data will be available on the page working area and on the **Ordered** tab of the «**Visitors**» subsection in «**Pass Office**» section.

### 5.1.3 «Archive» tab

Page overview:



Visitor	Document	Document number	Where (department)	Accompanying	Order date	Archiving date	Photo
Hayes Daniel	passport	jd-544-855	Administration	Bakers Matthew Samuel	13.11.2017 13:32:19	13.11.2017 14:07:16	
Hughes Joshua	passport	jk-586-921	Administration		13.11.2017 13:28:07	13.11.2017 14:07:59	
Lee Benjamin Joseph	driver license	55-62-196	Administration	Bakers Matthew Samuel	13.11.2017 13:07:28	13.11.2017 13:16:57	


1. Tab selector:


- [Ordered](#)
- [Current](#)
- **Archive**

2. Page toolbar:










**Edit/Restore** – click to edit Visitor personal record that is selected on the page working area.

 **Delete** – click to completely delete visitor that is selected on the page working area.


 **Advanced Search** – click this button to use additional filters for the selected elements.

 **Refresh the table** – click to refresh data.

 **More** – click to open command menu:

-  **Table print** – allows you to print data from the page working area.
-  **Export into XLS** – allows you to save data from the working area to MS Office Excel file with .xls extension.
-  **Export into CSV** – allows you to save data from the working area to OpenOffice Calc file with .csv extension.
-  **Reset filters** – click to reset all filters.
-  **Submit all the data to the controllers** – click to send access permissions data to controllers.
-  **Table display parameters** – select the columns that will be displayed on the page working area.

**Search** – search input field. Click **Reset**  to display all visitors.

 **Select from list** – a button on the right side of the **Departments** field that allows to display visitors of selected departments.


3. The page working area contains the list of visitors that have Identifier is EXPIREDS.

**Important:**


Multiple selection, [sort](#), [width change](#) and sequence of the columns functions are available.

### Issue pass for Archived visitor

To issue pass for Archived visitor:

1. Go to  «**Pass Office**» section.
2. Open «**Visitors**» subsection.
3. Switch to **Archive** tab.
4. Select visitor on the page working area. To find a visitor: use the

**Search** field and **Find**  button.

5. Click **Edit**  on the tab toolbar. **Visitor credentials** window will appear:

**Visitor credentials** ✕

<p>Last name: <input type="text" value="Hayes"/></p> <p>Name: <input type="text" value="Daniel"/></p> <p>Middle name: <input type="text"/></p> <p>Supporting document: <input type="text" value="passport"/></p> <p>Document number: <input type="text" value="jd-544-855"/></p>	<p>Where (department): Administration </p> <p>Accompanying: Bakers Matthew Samuel  ✕</p> <p>Access template: For visitors  ✕</p> <p>Valid until: 16.11.2017 23:45 </p> <p>Card: 587 </p>	<p>Images: Photo </p> <div style="border: 1px dashed #ccc; padding: 5px; text-align: center;"> </div> <p style="text-align: center;"> </p>
--	--	--

Additional fields     Fingerprints

Save

6. Edit visitor information if needed.


7. Click **Issue card** on the right side of the **Card** field. Enter the card number in the appeared **Issue card** window.
8. Click **Save**. **Visitor credentials** window will close. Visitor information will be moved to **Current** tab till ID Card expiration date and then will be moved to **Archive** tab.

## 5.2 «Employees» subsection




Subsection is used for:

- [issuing ID Cards for employees](#);
- [granting/ changing employees access permissions based on the previously created template](#);
- [employee cards printing based on the previously created design template](#);
- [changing the duration of employee ID Card validity](#);
- [temporary blocking and unblocking of employees ID Cards](#);
- [employees ID Card withdrawal](#);
- [adding and scanning of fingerprints](#).

## Page overview:



The screenshot shows a web application interface for managing employees. At the top, there is a toolbar with icons for edit, search, lock, unlock, issue card, find card, withdraw card, cards printing, refresh, and a menu. Below the toolbar is a table with columns: Employee, Department, Personnel number, Work schedule, Position, Access template, Card, Valid from, Valid until, and Photo. The table contains three rows of employee data.

Employee	Department	Personnel number	Work schedule	Position	Access template	Card	Valid from	Valid until	Photo
Bakers Matthew Samuel	Administration	52	5/2 9.00-17.45	Senior Manage	For employees	444	13.11.2017	04.09.2019	
Smith George Bill	Software Department	56	5/2 9.00-17.45	Programmer	For employees	144	13.11.2017	13.11.2019	
Wilson Liam Daniel	Technology Department	87	5/2 9.00-17.45	Engineer	For employees	523	13.11.2017	10.11.2019	

## 1. Page toolbar:



**Edit** – click to edit template, validity period, card number.



**Advanced search** – allows you to apply filters to elements that are displayed in the working area.



**Block** – click to temporary block employee ID Card that is selected on the page working area.



**Unblock** – click to unblock employee ID Card that is selected on the page working area.



**Issue card** – click to issue ID card for employee that is selected on the page working area.



**Find Card** – click to find a card by its number.



**Withdraw Card** – click to withdraw a previously issued employee's ID Card.








**Cards printing** – click to **Cards printing** for one or more employees that are selected on the page working area.





**Refresh the table** – click to refresh data.




**More** – click to open command menu:

-  **Table print** – allows you to print data from the page working area.
-  **Export into XLS** – allows you to save data from the working area to MS Office Excel file with .xls extension.
-  **Export into CSV** – allows you to save data from the working area to OpenOffice Calc file with .csv extension.
-  **Reset filters** – click to reset all filters.
-  **Output without/considering the temporary replacement** – allows you to display/hide the information about [temporary account data change](#) of employees. Hide mode shows permanent data of employees.



-  **Send data to controllers** – allows to send access data to controllers.
-  **Table display parameters**– select the columns that will be displayed on the page working area.



**Find** – button on the right side of the **Search** field performs a search operation. Click **Reset**  to clear the field.



**Select from list** – button on the right side of the Department field allows to select a Department and its visitors that will be displayed on the page working area.



2. The page working area contains the list of employees of the selected Department. Sign  indicates that ID Card is blocked. Sign  indicates that not all access permissions were sent to controllers.

**Important:**

Multiple selection, [sort](#), [width change](#) and sequence of the columns functions are available.


### 5.2.1 Issue Card

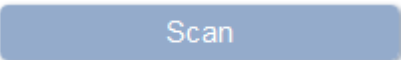
To issue an ID Card:

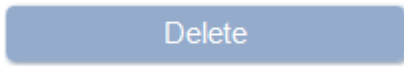
1. Go to  «**Access control department**» section.
2. Open «**Employee**» subsection.
3. Select an employee on the page working area.
4. Click **Edit**  on the page toolbar. **Edit Employee ID Card** window will appear:

5. Click **Issue Card**  on the right of the **Card** field. Enter the card number in the appeared **Issue card** window. [Rear more.](#)

## 6. Fingerprints

 – click to add additional finger.

 – click to start a fingerprints scanning process. In order to improve the scan quality, every finger has to be scanned twice. Scanned fingerprints are displayed in the center of the tab.



– delete selected finger.





– buttons that allow to switch between fingers.

**Quality:** – scale for adjusting the quality of fingerprint scans. The current quality value is displayed on the right side of the scale.



***Important:***

Usage of high quality improves the image sharpness and positively affects on unauthorized passage prevention. Furthermore, the fingerprints scanning denial results increase (due to verification fingerprints scan error), so that necessity of rescanning.


7. Edit employee Access template if needed. Click **Select from the list**  on the right side of the **Access template** field. In the appeared window select the desirable template and click **Ok**.
8. Change ID Card validity period if needed. Click  on the right side of the **Valid till** field. [Set date](#) in the appeared calendar window and click **Ok**.
9. Click **Save. Edit Employee ID Card** window will close. The number and edited access permissions will be passed to controllers.

## 5.2.2 Edit Card

To change the validity period:





1. Go to  «**Pass Office**» section.
2. Open «**Employee**» subsection.
3. Select employee data.
4. Click **Edit**  on the page toolbar. **Employee card editing** window will appear:



5. In the appeared window click  on the right side of the **Valid until** field: and [change validity date](#).
6. Use the [Fingerprints](#) panel to add a fingerprints scanning verification.
7. Click **Save**. **Employee card editing** window will close, validity period will be changed.



### 5.2.3 Block/Unblock Card

To block/ unblock a card of one or more employees:

1. Go to  «**Pass Office**» section.
2. Open «**Employee**» subsection.
3. Select the data line of one or more employees.
4. Click **Block**  / **Unblock**  button on the page toolbar.
5. In the confirmation window click **Block/ Unblock**. Sign  will appear or disappear from the data line.

## 5.2.4 Withdraw Card

To Withdraw the Card of one or more employees:

1. Go to  «**Pass Office**» section.
2. Open «**Employee**» subsection.
3. Select employees ID Cards that have to be withdrawn.
4. Click **Withdraw Card**  on the page toolbar.
5. Click **Withdraw** in the confirmation window. The selected cards will be withdrawn.

## 5.3 «Access templates» subsection

### **Important:**

It is necessary to create a list of premises, add system controllers, allocate all controllers in the premises before you start working with the subsection. To do this: go to «**Configuration**» subsection in the «**Administration**» section.

The following subsection tabs are available:

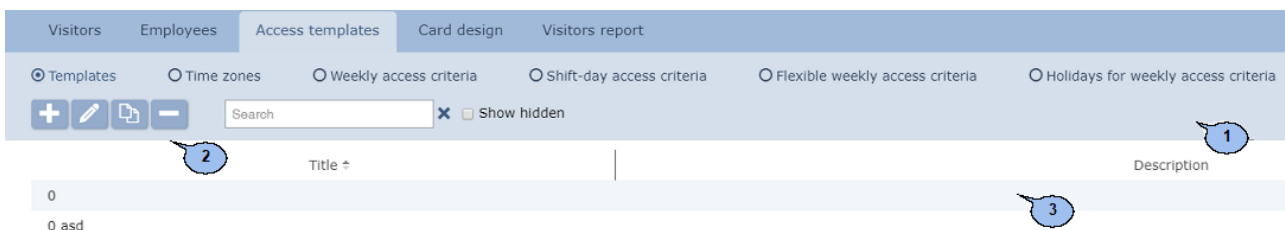
Tab Templates is used for creating access to premises templates for visitors and employees as well as editing and deleting of the previously created templates. Access permissions are applied to every premise (Verification, antipass).

Tabs [Time zones](#), [Weekly access criteria](#), [Shift-day access criteria](#), [Flexible weekly access criteria](#) are used for configuration of access permissions.

[Holidays for weekly access criteria](#) tab can be used for creating holidays calendar for weekly shifts.

### 5.3.1 «Templates» tab

Page overview:



1. Tab selector:

- **Templates**
- [Time zones](#)
- [Weekly access criteria](#)
- [Shift-day access criteria](#)
- [Flexible weekly access criteria](#)
- [Holidays for weekly access criteria](#)

## 2. Page toolbar:



**Add** – Click to create a new Access template.




**Edit** – Click to Edit a template that is selected on the page working area.



**Copy** – Click to create a copy of a template that is selected on the page working area.



**Delete/Restore** – Click to delete a template that is selected on the page working area. If a template has been applied to any ID Card, then it will become hidden and will not be deleted. Restore button will restore element if hidden template has been selected. Hidden templates are displayed on the page working area when **Show hidden** checkbox is ticked.

**Search** – Input field for data to search. Click **Reset**  button to clear the field.

**Show hidden** – Hidden templates (marked grey) are displayed on the page working area when **Show hidden** checkbox is ticked.

## 3. The page working area contains the list of previously created access templates.

### **Important:**



[Sorting](#), [changing width](#) functions are available on the page working area.

## Creation of Access template

### **Warning!**

Create desirable access time intervals before adding the access templates.

To create a new template:

1. Go to  «**Pass Office**» section.
2. Open «**Access templates**» subsection.
3. Switch tab selector to **Templates** mode.
4. Click **Add**  button on the page toolbar. **Template adding** window will appear:

**Template adding**
✕

Template name:

Template description:

	Time access criterion	Criterion name	Access type	Verification	Antipass
<b>Rooms</b>					
🏠 Mifare&Suprema	Undefined	Undefined	Undefined	?	?
🏠 Mifare	Undefined	Undefined	Undefined	?	?
🏠 Perco	Undefined	Undefined	Undefined	?	?
🏠 Suprema	Undefined	Undefined	Undefined	?	?
🏠 warehouses	Undefined	Undefined	Undefined	?	?
🏠 warehouse 1	Undefined	Undefined	Undefined	?	?
🏠 warehouse 2	Undefined	Undefined	Undefined	?	?
🏠 warehouse 3	Undefined	Undefined	Undefined	?	?

5. Specify the name and the description of a template.
6. Select one of the premises in the **Rooms** list. The premise access configuration panel will pop up.
7. Configure access permissions by using [Access permissions of PERCo controller](#) and [Access permissions of Suprema controller](#) sections.
8. Select other premise from the list of **Rooms** if needed. Configure access premises.
9. Click **Save**. **Template adding** window will close. New access template will appear on the page working area.

**Access permissions of PERCo controllers** field will become active when the controllers are placed in the premise:



**Access parameters of PERCo controller**
✕

Time access criterion  Verification

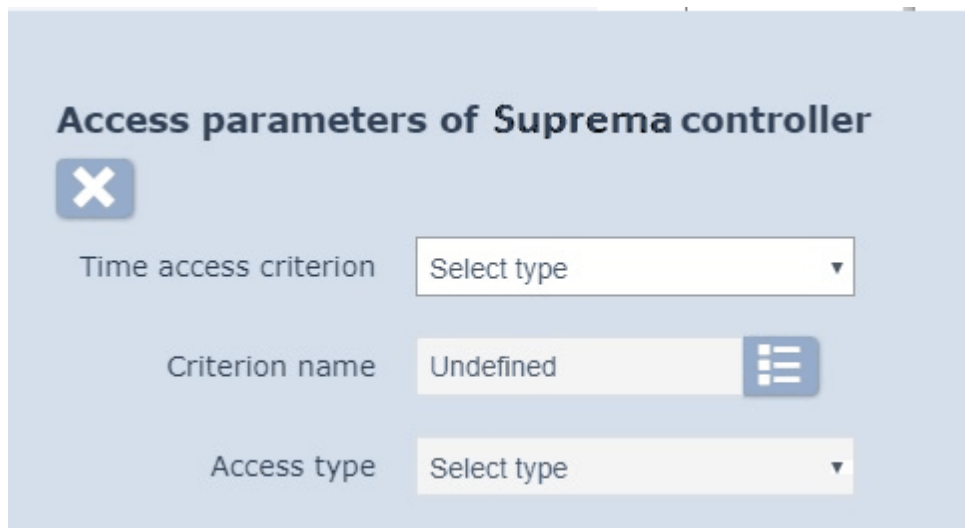
Criterion name  Antipass


Access type

1. Select one of the access criteria from the **Time access criteria** drop down menu:
  - [Time zones](#)
  - [Weekly access criteria](#)
  - [Shift-day access criteria](#)
  - [Flexible weekly access criteria](#)

2. Click  button on the right side of the **Criterion name** field. In the appeared window select one of the access criteria and click **Ok**. The selected criteria will appear in the **Criterion name** field.
  3. Select the type of access permissions from the **Access type** drop down list:
    - **Access**
    - **Access and arming/disarming**
    - **Access and arming/disarming with double check**
    - **Double-check access**
    - **Double-check access and arming /disarming with double check**
- Important!**
- Common rights and parameters are applied to the whole premise, in other words for both passage directions for all controllers that are located in the premise.
  - Arming and disarming is supported only by lock controllers.
4. Switch on the **Antipass** function to prevent the pass of ID Cards.
  5. Tick **Verification** to switch on the procedure of verification by operator (while passing through).
  6. Click **Not specified**  to reset all parameters.

**Access permissions of Suprema controllers** field will become active when the controllers are placed in the premise:



1. Select one of the access criteria from the **Time access criteria** drop down menu:
  - [Time zones](#)
  - [Weekly access criteria](#)
  - [Flexible weekly access criteria](#)
2. Click  button on the right side of the **Criterion name** field. In the appeared window select one of the access criteria and click **Ok**. The selected criteria will appear in the **Criterion name** field.

3. Select the type of access from the **Access type** drop down list:

- **ID Card and fingerprint;**
- **Fingerprint;**
- **ID Card.**

**Important!**

Common rights and parameters are applied to the whole premise, in other words for both passage directions for all controllers located in the premise.

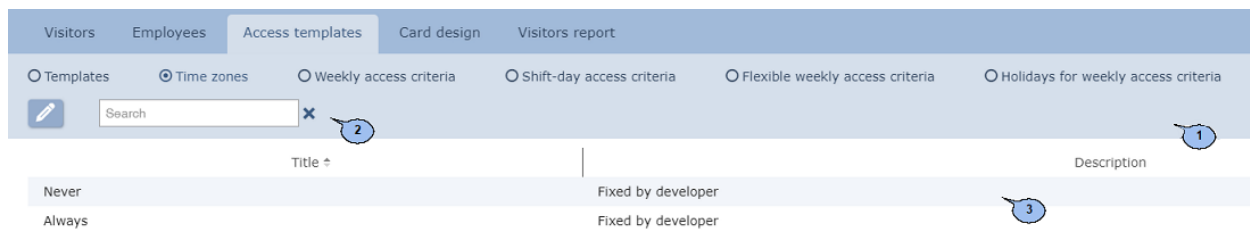
4. Click **Not specified**  to reset all parameters.

5. Select another premise if needed and configure access parameters.

6. Click **Save. Add template** window will close. New access template will appear on the page working area.

### 5.3.2 «Time zones» tab

Page overview:



1. Tab selector:

- [Templates](#)
- **Time zones**
- [Weekly access criteria](#)
- [Shift-day access criteria](#)
- [Flexible weekly access criteria](#)
- [Holidays for weekly access criteria](#)

2. Page toolbar:



**Edit** – click this button to edit time access permissions that is selected on the page working area. Page overview:

Time zone editing
✕


Time zone name:

Time zone description :

N- 4

09:30



17:30

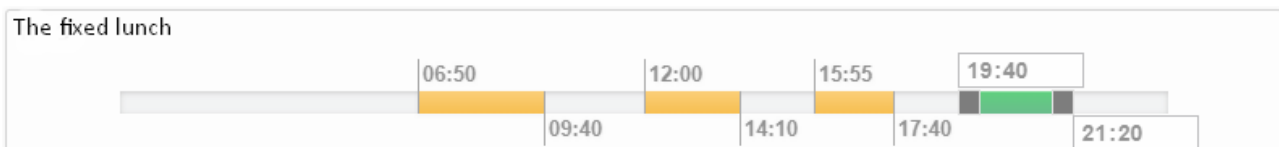
**Search** – Input field for data to search on the page working area. Click **Reset**  button to clear field.

3. 255 lines that correspond to different access permissions of the *Time zone* type are displayed on the page working area. 2 of these types (*Never* and *Always*) can't be changed.

### «Time zones» access criteria configuration

To configure access criteria:

1. Go to  «**Pass Office**».
2. Open «**Access templates**» subsection.
3. Switch to **Time zones** tab.
4. Select one of the previously created access criteria that had not been used.
5. Click **Edit**  on the page toolbar.
6. Change name of the time zone. Enter the description if needed.
7. On the time scale specify up to 4 access intervals not less than 30 minutes each. Access to premises will be granted during these periods:
  - select a time interval on a scale while holding mouse left button;
  - edit interval: select it on a time scale while holding mouse left button and change the duration by using sliders;
  - delete interval: select it on a time scale while holding mouse left button and click **Remove the selected interval** or push **Del** button on the keyboard. Page overview:





8. Click **Ok** to finish.

### 5.3.3 «Weekly access criteria» tab

This page has the same interface as **Time zones** tab. 255 access criteria are available for *Weekly* type. Two of these criteria are *Access granted* and *Access denied* can't be changed.

To configure access criteria:

1. Go to  «**Pass Office**» section.
2. Open «**Access templates**» subsection.
3. Switch to **Weekly access criteria** tab.
4. On the page working area select one of the previously created criteria that hadn't been used.
5. Click **Edit**  on the page toolbar. **Editing of weekly access criterion** window will appear:

**Editing of the weekly access criterion**
✕

Weekly access criterion name:

Description of weekly access criterion :

---

✎

**Working day**

| 09:30

| 17:30

Mon

**Working day**

| 09:30

| 17:30

Tu

**Never**

Wed

Th

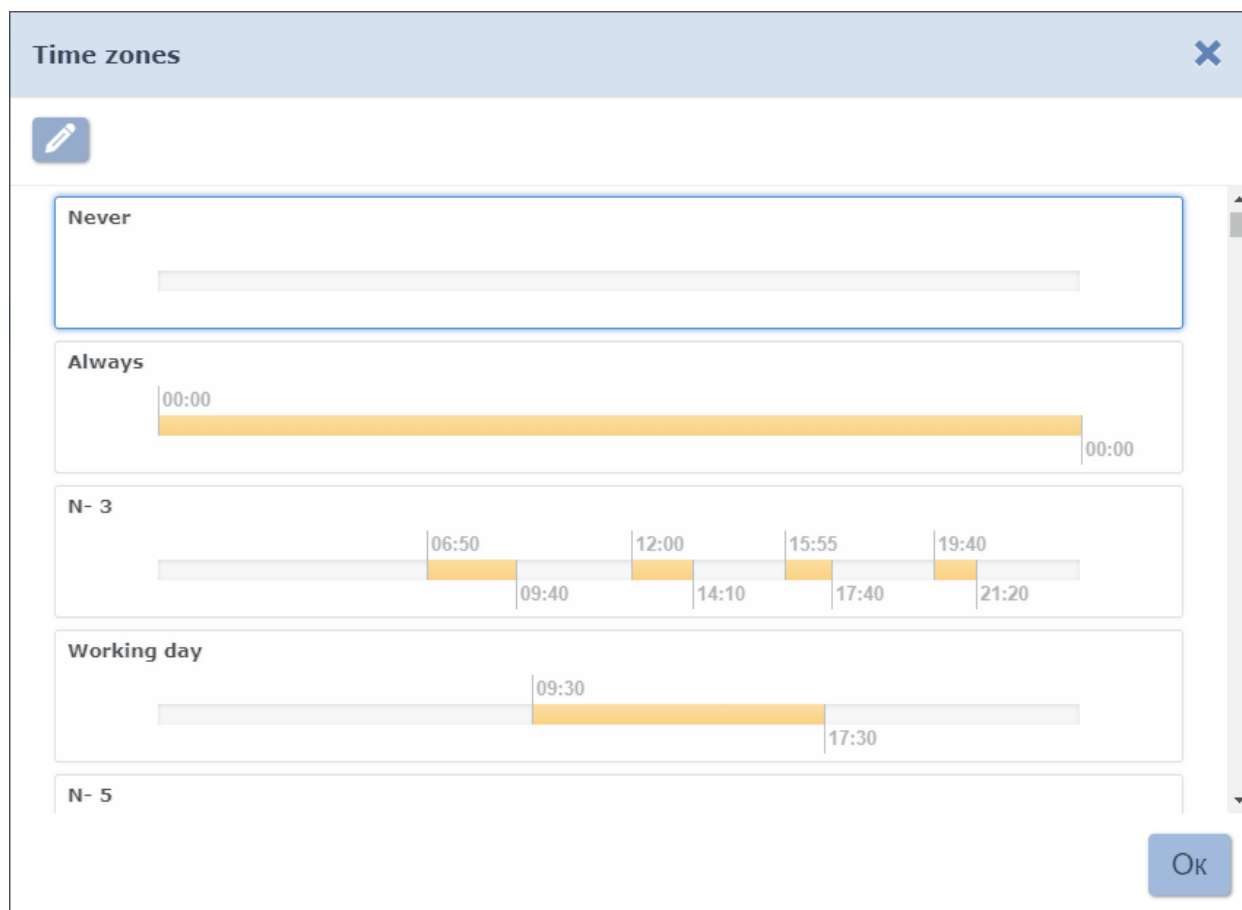
OK

6. In the appeared window change name and the description of access criteria if needed.

7. 15 time scales that correspond to 7 days of the week and 8 types of holidays are available for editing on the page working area. It is necessary to set *Time zone* access criteria type for each scale. To do

this: select one of the days (holidays) and click **Edit time zone**  at the top of the window. **Time zones** window will appear:





8. In the appeared window select one of the *Time zone* access criteria, which you want to apply to the selected day and click **Ok**. **Time zones** window will close.

**Important:**



**Time zones** access criteria can be changed in the *Time zone* window.



9. Consequently select and set access criteria for each day of the week and desirable amount of holidays.
10. Click **Ok** to finish. **Editing of weekly access criterion** window will close.

### 5.3.4 «Shift-day access criteria» tab

This page has the same interface as [Time zones](#) tab. 255 access criteria are available for the *Shift-day* type. Two of these criteria are *Access granted* and *Access denied* can't be changed.

To configure access criteria:

1. Go to  «**Pass Office**».
2. Open «**Access templates**» subsection.
3. Switch to **Shift-day access criteria** tab.
4. On the page working area select one of the previously created criteria that hadn't been used.
5. Click **Edit**  on the page toolbar. **Edit of shift-day criteria** window will appear:

6. Change name and the description of the access criteria if needed.
7. Specify the date of the first shift according to the access criteria. Click  on the right side of the **Shift start date** field. [Set the date](#) by using the calendar.
8. Add desirable number of shift days, Click **Add time zone**  at the bottom of the page. **Time zones** window will appear:

9. In the appeared window select one of the *Time zone* access criteria, which you would like to apply to the shift day and click **Ok**. **Time zones** window will close. A 24 hours time scale that corresponds to the first shift will be added to the **Edit of shift-day criteria** page.

**Important:**


**Time zones** access criteria can be changed in the *Time zone* window.

10. Add desirable number of shifts by repeating the same procedure. Number of shifts can't exceed 30 days.
11. Click **Ok** to finish. **Edit daily shift access criteria** window will close.

### 5.3.5 «Flexible weekly access criteria» tab

This page has the same interface as Time zones tab. 255 access criteria are available for the Flexible weekly access criteria type. Two of these criteria - Access granted and Access denied can't be changed.

To configure access criteria:

1. Go to  «**Pass Office**».
2. Open «**Access templates**» subsection.
3. Switch to tab **Flexible weekly access criteria**.
4. On the page working area select one of the previously created criteria that hadn't been used before.
5. Click Edit on the page toolbar. **Editing of the flexible weekly access criterion** window will appear:

**Editing of the flexible weekly access criterion** ✕


Criterion name:

Description of the access criterion :

Shift start date:  

+
✎
-

Ok

6. Change name and the description of the access criteria if needed.
7. Specify the date of the first shift according to the access criteria that is being created. Click  on the right side of the Shift start date field. Set date using calendar.
8. Add desirable number of shift days by clicking **Add weekly access criteria** at the bottom of the page. **Weekly access criteria** window will appear:

**Weekly access criteria** [X]

[Edit icon]

- Access denied
- Access is granted
- N- 3
- N- 4
- N- 5
- N- 6
- N- 7
- N- 8
- N- 9
- N- 10

[Ok]

9. In the appeared window select one of the **Weekly access criteria**, which you would like to apply to the shift day and click **Ok**. **Weekly access criteria** window will close. A line that corresponds to the first shift will be added to the **Editing of the flexible weekly access criterion** page.

***Important:***

Weekly type access criteria can be changed on the Weekly access criteria page. To do this: select one of the access criteria and click Edit access criteria at the top of the page.

10. In the appeared window select one of the **Weekly access criteria**, which you want to apply to the selected week and click **Ok**. **Weekly access criteria** window will close.
11. Add desirable number of weeks by repeating the same procedure. Number of weeks can't exceed 30.
12. Click **Ok** to finish. **Editing of the flexible weekly access criterion** window will close.

## 5.3.6 «Holidays for weekly access criteria» tab

Page overview:

<input type="radio"/> Templates <input type="radio"/> Time zones <input type="radio"/> Weekly access criteria <input type="radio"/> Shift-day access criteria <input type="radio"/> Flexible weekly access criteria <input checked="" type="radio"/> Holidays for weekly access criteria		
Day	Type	Description
1 Jan	1	
2 Jan	1	
8 Jan	1	

1. Tab selector:

- [Templates](#)
- [Time zones](#)
- [Weekly access criteria](#)
- [Shift-day access criteria](#)
- [Flexible weekly access criteria](#)
- **Holidays for weekly access criteria**

2. Subsection toolbar includes:



**Add** – click to add a new holiday.



**Edit** – click to edit a holiday that is selected on the page working area.




**Delete** – click to delete a holiday that is selected on the page working area.

3. The page working area contains the list of holidays.

### Creation of a holidays list

To add a new holiday:

1. Go to  «**Pass Office**».
2. Open «**Access templates**» subsection.
3. Switch to **Holidays for weekly access criteria** tab.

4. Click **Add**  button on the page toolbar. **Add day** window will appear:

Add day
✕

Month:

Day:

Type:

Name:

5. In the appeared window:

- specify a holiday date by using a drop down **Day, Month** lists;
  - select one of the 8 holidays types by using the **Type** drop down list;
  - enter a name in the **Name** field.
6. Click **Save**. **Add day** window will close. A new holiday will be added to the page working area.
7. Add more holidays if needed.

## 5.4 «Card Design» subsection

Subsection is used for:

- [Creation of ID Cards design templates](#) for employees and visitors that can be printed on ID Cards (85x54 mm).
- copying templates.

Subsection page overview:



1. Page toolbar:



**Add** – Click to create new ID Card template.



**Edit** – click to Edit template that is selected on the page working area.



**Copy** – click to copy template that is selected on the page working area.



**Delete** – click to delete template that is selected on the page working area.

2. The page working area contains the list of previously created access templates.

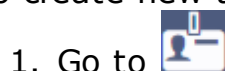
### **Important:**

Functions of [sorting](#) by columns, [changing width](#) are available on the page working area.

3. Template draft that is selected on the page working area.


### 5.4.1 Creation of ID Card template

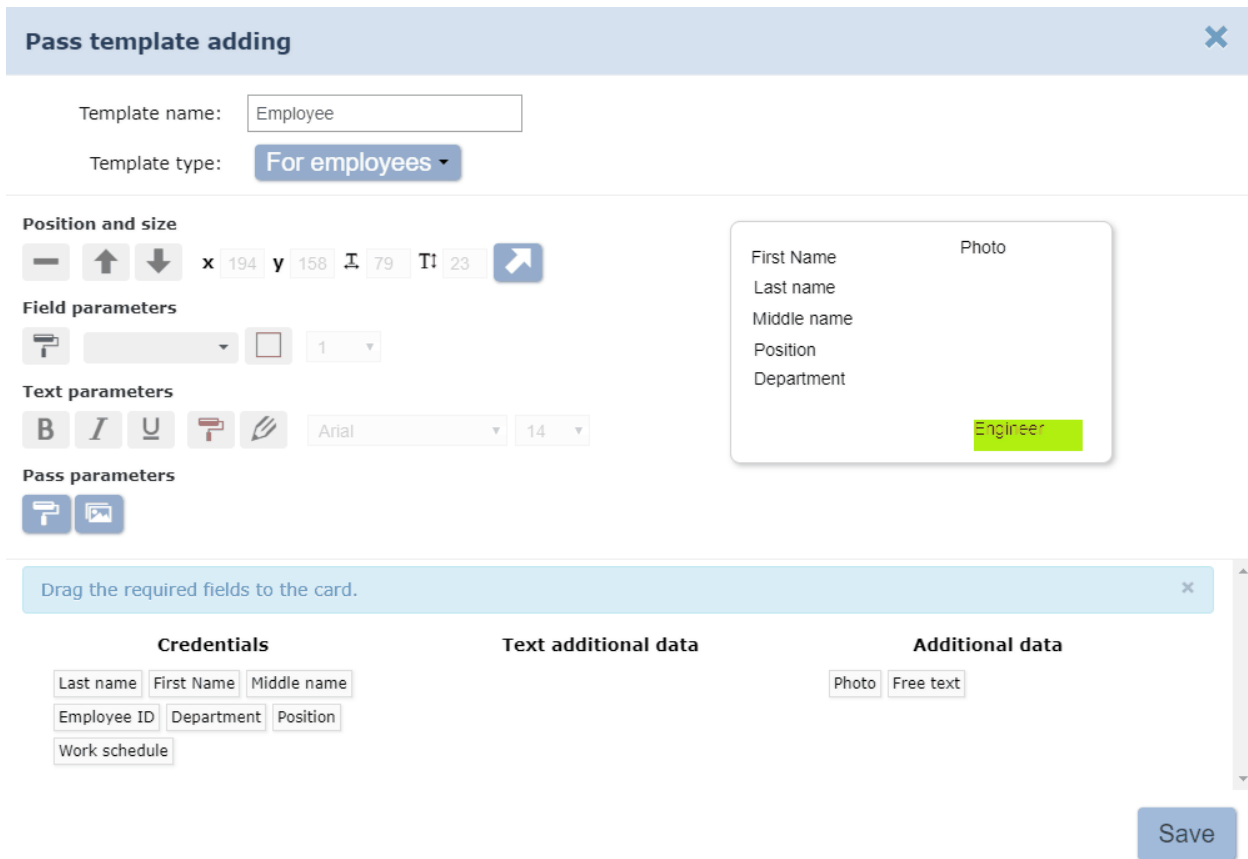
To create new template:



1. Go to «**Pass office**».

2. Open «**Card design**» subsection.

3. Click **Add**  on the page toolbar. Window will appear **Pass template adding**:



4. Specify the name in the **Template name** field.
5. Select the category of ID Cards using the **Template type** drop down menu:
  - **For Employees**
  - **For Visitors**
6. Drag desirable elements to the template.  
 The following fields are available for adding to the template:
  - **Account data**– employee or visitor personal information that is indicated in the correspondent fields.
    - **Last name**
    - **First name**
    - **Middle name**
    - **ID number**
    - **Department**
    - **Position**
    - **Work schedules**
    - **Supporting document**
    - **Document number**
    - **Accompanying**
    - **Access template**
  - **Additional text data**
  - **Additional data**
    - **Photo**

- **Free text** – free text that is applied to all ID Cards that use the template. It is possible to configure the font style for this text (size, style, color etc.)
7. Adjust the position of the template elements by using the **Position and size** toolbar.
  8. Set the background color and border types by using the **Field parameters** toolbar.
  9. Configure font parameters (size, style, color etc) by using the **Text parameters** toolbar.
  10. Set the ID Card template background color or select an image file by using the **Pass parameters** tools. It is possible to use image files with *.jpg, .jpeg, .pjpeg, .png, .gif* extensions, no more than 40 kb.
  11. Click **Save**. **Pass template adding** window will close and new template will be added to the page working area.

## 5.5 «Visitors report» Subsection

Subsection is used for generating Visitors reports. Visitors with ID Cards as well as Archived visitors will be included in the report. It contains the information about Visitors who had ID Cards including enter/exit events that had been registered by controllers. Subsection page overview:

Full Name	Document	Document number	Department	Accompanying	Card number +	Valid from	Valid until	First event	Last event	Archiving date
werew rewr ewrwer			Пасафотка	Ааһматов Иван		06.04.2017 00:00:00	21.07.2018 23:45:00			06.04.2017 15:31:00

1. Subsection toolbar contains:



**More – click to open command menu:**

- **Table print** – allows you to print data from the page working area.
- **Export into XLS** – allows you to save the list of events as a *MS Office Excel* spreadsheet file with *.xls* extension.
- **Export into CSV** – allows you to save the list of events as *OpenOffice Calc* spreadsheet file with *.csv* extension.
- **Reset filters** – click to reset all filters.
- **Table display parameters** – click to select the columns that will be displayed on the page working area.



**Advanced Search** – click to apply filter to elements from the page working area.



– opens calendar panel where you can set [date and time](#) period that will be displayed on the page working area. Applied date and time are displayed near the correspondent button.



**Apply** – click to form the list of events for the specified period.



**Select from list** – button on the right side of the Department field allows you to select a Department and its visitors that will be displayed on the page working area.



**Search** – data search field. Click **Reset**  to clear the field.

2. Subsection working area contains the information about Visitors of the selected Department for the specified period. It contains the information about Visitors who had ID Cards including enter/exit events that had been registered by controllers.

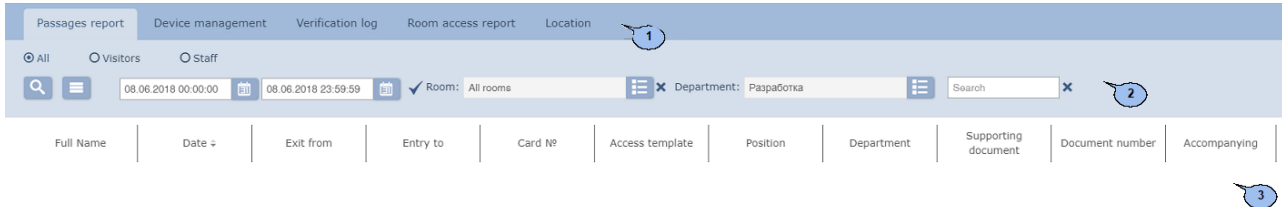
***Important:***

- [Page navigation tools](#) are available at the bottom of the page.
- [Sort](#) the column elements, [change width](#) and [sequences](#) in the working area.

## 6 «Access control» section

### 6.1 «Passage report» subsection

This subsection is used for generation of reports on employees/visitors passage events. Subsection page overview:



1. ID Card owner selector:

- **All**
- **Visitors**
- **Staff**

2. Panel toolbar contains:



**More – click to open command menu:**

- **Table print** – allows you to print data from the page working area.
- **Export into XLS** – allows you to save the list of events as *MS Office Excel* spreadsheet file with .xls extension.
- **Export into CSV** – allows you to save the list of events as *OpenOffice Calc* spreadsheet file with .csv extension.
- **Reset filters** – allows you to reset all applied filters (as well as Department).
- **Table display parameters** – opens an additional window where you can select the columns that will be displayed on the page working area.



**Advanced Search** – click to configure the displayed data filters.



– click this button to open calendar panel where you can [entry date and time](#) of the beginning and the end of the period. The events will be displayed within the range of this period. Specified date and time are displayed on the left side of the correspondent button.



**Apply** – click to form the list of events within the specified period.



**Select from list** – use this button on the right side of the **Premise** field to select a premise. Enter-exit events will be displayed on the page working area. Click **Reset** button on the right side to see all passage events to all premises.



**Select from list** – click this button on the right of the **Department** field and select the department. Employees/visitors passage events of this premise will be displayed on the page working area.

**Search** – Search input field. Click **Reset**  to clear the field.

3. Subsection working area contains the list of registered events for the period that is specified on the toolbar.

**Important:**

- [Sorting](#), [changing width](#) functions are available on the page working area.
- [Page navigation tools](#) can be found at the bottom of the page.

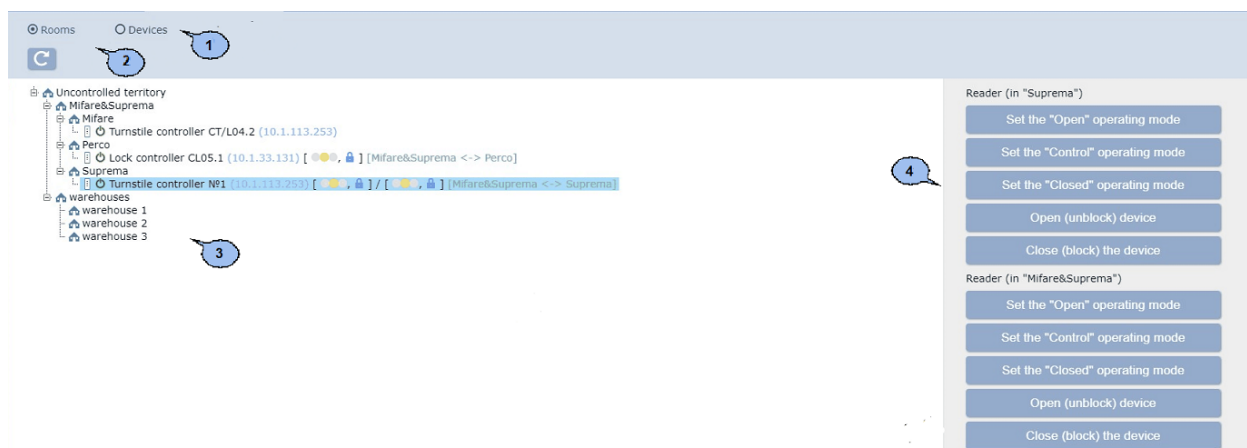
## 6.2 «Device management» subsection

This subsection is used for prompt response purposes. The following tabs are available:

- [Rooms](#) tab can be used for simultaneous operation of all devices that are located within selected premise.
- [Devices](#) tab is used for separate devices control.

### 6.2.1 Tab «Rooms»

Page overview:



1. Tab selector.

- **Rooms**
- **Devices**

2. Page toolbar contains:



**Refresh** – click to update data from the working areas.


3. The working area contains a multi-level list of premises and devices that are located there.

4. Command panel contains the list of commands that are supported by devices that are located in the selected premises. All commands are grouped together by types of device resources.

**Important:**

The given command will be executed by all devices that support it and are located in the selected premise.


## Giving commands to all devices of one premise

1. Go to  «**Access control**».
2. Open «**Device management**» subsection.
3. Switch to **Rooms** tab.
4. Select a premise on the page working area. The command will be sent to all devices that are located in this premise. The list of supported commands will appear on command panel.
5. Click on desirable command.

### 6.2.2 Tab «Devices»


Page overview:



1. Tab selector.
  - **Rooms**
  - **Devices**
2. Page toolbar contains:
  -  **Refresh** – click to update data.
3. Tab working area contains the list of security devices.
4. Command panel contains the [list of commands](#) which are supported by device. All commands are grouped together by types of device resources.

### Giving a command to system device

To give a command:

1. Go to  «**Access control**».
2. Open «**Device management**» subsection.
3. Switch to **Devices** tab.
4. Select the device on the page working area. The list of supported commands will appear on the panel.
5. Select desirable command.

## 6.3 «Room access report» subsection

Subsection is used for report generation on access parameters and employees/ visitors access permissions to premises. Subsection page overview:

Full Name *	Card №	Room	Access type	Position	Department	Supporting document	Document number	Access template	Verification	Antipass
Smith John	65913	Mifare&Suprema	Access	Senior Manager	Technology departm			Template of access	Verifying	Off

1. ID Card owner selector:

- **All**
- **Visitors**
- **Staff**

2. Page toolbar contains:



**More – click to open command menu:**

- **Table print** – allows you to print data from the page working area.
- **Export into XLS** – allows you to save the list of access permissions as *MS Office Excel* spreadsheet file with .xls extension.
- **Export into CSV** – allows you to save the list of access permissions as *OpenOffice Calc* spreadsheet file with .csv extension.
- **Reset filters** – allows you to reset all applied filters (as well as selected department).
- **Table display parameters** – allows you to open additional window where you can select the columns that will be displayed on the page working area.



**Advanced search** – click to configure filters for data that is displayed on the page working area.



**Select from list** – click this button on the right side of the **Rooms** field and select one premise. Access permissions to the selected premise will be displayed on the page working area. Click

**Reset** button to clear the field.



**Select from list** – click this button on the right side of the **Department** field and select a department. Employees/ visitors access permissions of the selected department will be displayed on the page working area.

**Search** – search input field. Click **Reset** button to clear the field.

3. The page working area contains the list of employees/ visitors who have access permissions to the selected premise.

***Important:***

- [Sorting](#), [changing width](#) functions are available on the page working area.
- [Page navigation tools](#) can be found at the bottom of the page.

## 7 «Pass Order» section

This section is used for organizing WKS for employees who work in the Pass Office or security service of the enterprise. This section allows you to automate processes of ID Card booking for visitors.

The following tabs are available:

Tab [Pass Order](#) is used for [Visitors ID Card booking](#) and their further issuing in the «**Pass Office**» section.

Tab [Archive](#) is used for [Visitors ID Card re-booking](#) based on the previously added information that is stored in the archive.

### 7.1 «Pass Order» tab

Entered information from the subsection is available on the [Ordered](#) tab of the «**Visitors**» subsection of the «**Access control department**» section.

Page overview:

Visitor	Document number	Document	Where (department)	Accompanying	Order date	Valid until	Photo
Doe John			PERCO	Batrakin Petr	17.04.2018 18:23:48	17.04.2018 23:45:00	

1. Tab selector:

- **Pass Order**
- [Archive](#)

2. Page toolbar:



**Add** – click to order ID Card.



**Edit** – click to Edit Visitor personal record that is selected on the page working area.



**Delete** – click to delete selected visitor from the archive.



[Advanced search](#) – click to configure filters of data that is displayed on the page working area.







**Refresh the table** – click to update data on the page.



**More – click to open command menu:**

- [Table print](#) – allows you to print data from the page working area.
- [Export into XLS](#) – allows you to save data from the working area to MS Office Excel file with .xls extension.
- [Export into CSV](#) – allows you to save data from the working area to OpenOffice Calc file with .csv extension.

-  **Import from XLS, XLSX, CSV** – allows you to import list of positions from spreadsheet files with .XLS, .XLSX or .CSV extensions.
-  **Reset filters** – click to reset all filters.
-  **Table display parameters**– select columns that will be displayed on the page working area.

 **Select from list** – a button on the right side of the **Where (department)** field allows you to select the department. Visitors of the selected department will be displayed on the page working area.



**Search** – search input field. Click **Reset**  to clear the field.

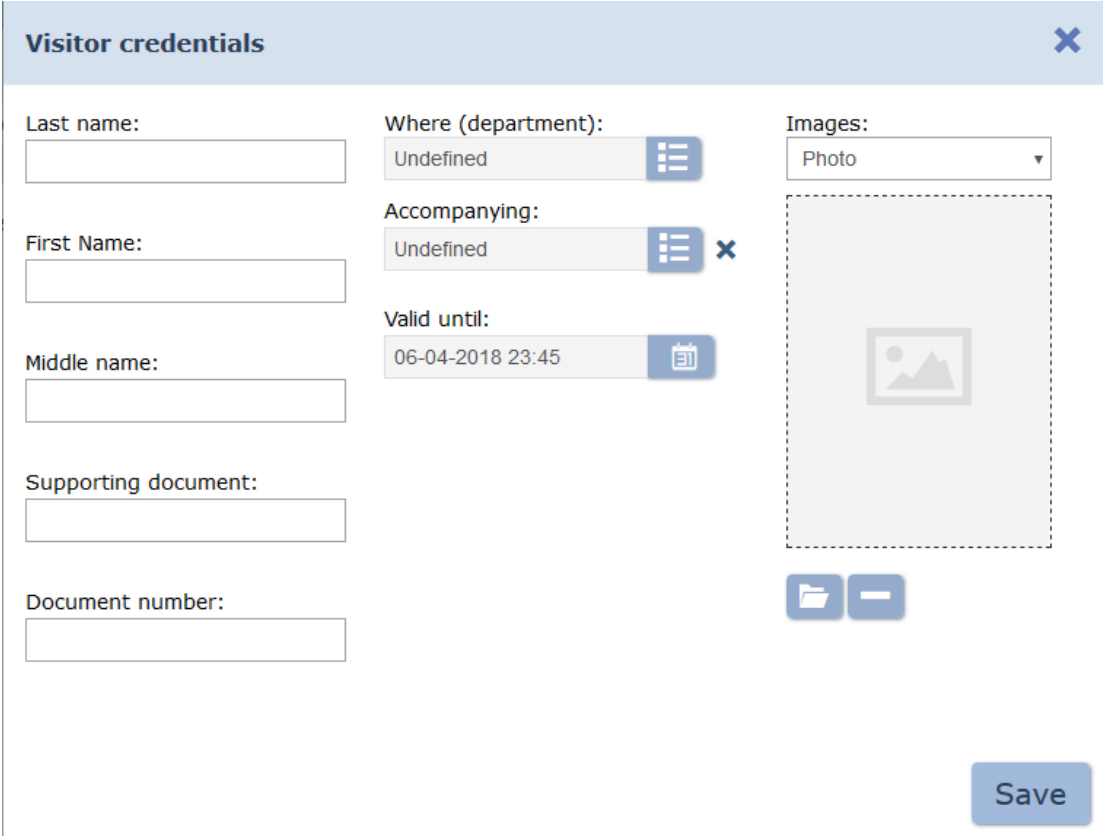
3. The page working area contains the list of visitors who have booked ID Cards but that are not issued yet.

**Important:**

- Multiple selection, sorting, changing width and change of the column sequence functions are available on the page working area.


### 7.1.1 Pass Order for Visitor


1. Go to  «**Pass Order**».
2. Switch to **Pass Order** tab.
3. Click **Add**  button on the toolbar. **Visitor credentials** window will appear:





**Visitor credentials**

Last name:


Where (department):  

Images:  

First Name:


Accompanying:   



Middle name:

Valid until:  

Supporting document:




Document number:






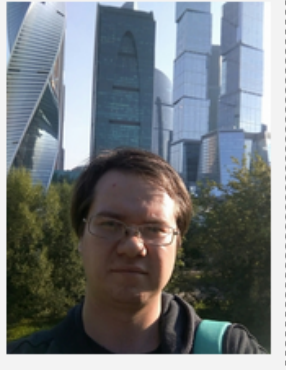


 

**Save**



4. In the correspondent fields specify full name, type and number of the document.
5. Click **Select from list**  button on the right side of the **Department** field and specify the department where visitor goes to.
6. Add photo and additional graphic data if needed. To do this: select from the **Images** drop down menu: type of graphic data and use **Upload from PC**  button.
7. Change ID Card validity period if needed by using **Valid from:** and **Valid until:** fields.
8. Indicate one of the department employees as an attendant. Click **Select from list**  on the right side of the **Accompanying** field and select one employee, if needed. Page overview:




**Visitor credentials** ✕

<p>Last name: <input type="text" value="Smith"/></p> <p>First Name: <input type="text" value="John"/></p> <p>Middle name: <input type="text"/></p> <p>Supporting document: <input type="text" value="passport"/></p> <p>Document number: <input type="text" value="66854456"/></p>	<p>Where (department): <input type="text" value="Web development"/> </p> <p>Accompanying: <input type="text" value="Black Harry"/>  ✕</p> <p>Valid until: <input type="text" value="06-04-2018 23:45"/> </p>	<p>Images: <input type="text" value="Photo"/> ▼</p> <div style="border: 1px dashed #ccc; padding: 5px; text-align: center;">  </div> <div style="text-align: center; margin-top: 5px;">   </div>
--	---	---

9. Enter additional text data if needed.
10. Click **Save** after you finished entering information. **Visitor credentials** window will close. Entered data will become available on the page working area and on the **Ordered** tab of the **«Visitors»** subsection of the **«Pass Office»** section.

## 7.2 «Archive» tab

Page overview:

Visitor	Document	Document number	Where (department)	Accompanying	Order date	Archiving date	Photo ↕
Smith John	passport	11236547	Web development	Black Harry	06-04-2018 14:28:50	06-04-2018 14:53:53	
Doe Mikhael	passport	99856475	Web development		06-04-2018 14:29:23	06-04-2018 14:53:53	
Smith Alex	driver license	4478-887453	Web development		06-04-2018 14:31:57	06-04-2018 14:53:53	


1. Tab selector:

- [Pass order](#)
- **Archive**

2. Page toolbar:



**Edit/Restore** – click this button to edit visitor personal record that is selected on the page working area. Click **Save** button to restore

account data from the archive after editing. Otherwise click  **Close** button.









**Delete** – click to fully delete data that is selected on the page working area.



[Advanced search](#) – click to configure filters for data that is displayed on the page working area.



**More – click to open command menu:**

-  [Table print](#) – allows you to print data from the page working area.
-  [Export into XLS](#) – allows you to save data from the working area to MS Office Excel file with .xls extension.
-  [Export into CSV](#) – allows you to save data from the working area to *OpenOffice Calc* file with .csv extension.
-  [Import from XLS, XLSX, CSV](#) – allows you to import the list of positions from spreadsheet files with .XLS, .XLSX or .CSV extensions.
-  **Reset filters** – click to reset all filters.
-  **Table display parameters** – select columns that will be displayed on the page working area.



[Select from list](#) – a button on the right side of the **Where (department)** field allows you to select a department. Employees of this department will be displayed on the page working area.




**Search** – search input field. Click **Reset**  to clear the field.

- The page working area contains the list of visitors who have booked ID Cards but that are not issued yet.









**Important:**

Multiple selection, [sorting](#), [changing width](#) and change of the column sequence functions are available on the page working area.

### 7.2.1 Pass Order for Archived visitor

- Go to  «**Pass Order**».
- Switch to **Archive** tab.
- Select visitor on the page working area to whom you are planning to issue an ID Card. Use **Search** field to find and [Advanced search](#)  button.
- Click **Edit/Re store**  on the toolbar. **Visitor credentials** window will appear:

**Visitor credentials** ✕

Last name: <input style="width: 90%;" type="text" value="Smith"/>	Where (department): <input style="width: 90%;" type="text" value="Web development"/> 	Images: <input style="width: 90%;" type="text" value="Photo"/> 
First Name: <input style="width: 90%;" type="text" value="John"/>	Accompanying: <input style="width: 90%;" type="text" value="Black Harry"/>  	<div style="border: 1px dashed #ccc; padding: 5px; text-align: center;">  </div> <div style="text-align: right; margin-top: 5px;">   </div>
Middle name: <input style="width: 90%;" type="text"/>	Valid until: <input style="width: 90%;" type="text" value="06-04-2018 23:45"/> 	
Supporting document: <input style="width: 90%;" type="text" value="passport"/>		
Document number: <input style="width: 90%;" type="text" value="66854456"/>		

- Edit data, if needed.
- Click **Save**. **Visitor credentials** window will close. Entered data will become available on **Pass Order** tab and **Ordered** tab in «**Visitors**» subsection of the «**Pass Office**» section.

## 8 Control commands

### Alarm generator

**Reset alarm** – «Alarm» mode will be switched off.

**Raise the alarm** – the controller will be switched to «Alarm» mode, all exits that have **Type: Alarm generator** will be activated.

### Lock

**Set to armed mode** – OD will be switched to «Armed» ACM.

**Set to disarmed mode** – OD will be switched from «Armed» ACM to the previous ACM.

**Reset alarm** – «Alarm» mode will be switched off. OD will be switched to «Armed» ACM.

**Block** – OD will be blocked.

**Unblock** – OD will be unblocked.

**Reset zonality** – resets lock zonality.

### Additional output

**Activate** – all outputs that have **Type: Normal output**, will be activated. The activation period is defined by **Activization time** parameter.

**Important:**

Additional outputs that have **Type: Alarm generator** can not be activated with **Activate** command.

**Normalize** – all outputs that have **Type: Normal output** will be normalized.

### Reader

**Set to «Open» operational mode** – OD will be switched to «Open» ACM.

**Set to «Control» operational mode** – OD will be switched in «Control» ACM.

**Set to «Closed» operational mode** – OD will be switched in «Closed» ACM.

**Open (unblock) OD** – OD will be unblocked for the period that is defined by **Unblock time**. This command is available when «Control» ACM is used. This parameter unblocks OD for a short period of time.

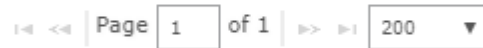
**Close (block) OD** – OD will be blocked. This command is available when «Control» ACM is used. This command blocks OD after executing **Open (unblock) OD** command.

## 9 Standart operations

### 9.1 Working area operations

#### Data pages navigation tools



Navigation tools are placed at the bottom of the page:



The following tools are available:

- ◀ – to the first page;
- ◀◀ – to the previous page;
- Page. ... of...** – page number entry field;
- ▶▶ – to the next page;
- ▶ – to the last page.

#### Sorting

Function of [sorting](#) by columns is available on the page working area. Click the column name that will be used for sorting: one click – ascending sorting , two – descending sorting .

#### Changing the column width

To change the column width: move the mouse pointer to the border between two column headers and click left button. Move the border left or right by holding left button. Release the button when finished.

#### Changing the column sequence

To change the column sequence: click the column header and move the column left or right by holding left mouse button. Release the button when finished.


#### Selecting several elements from the list

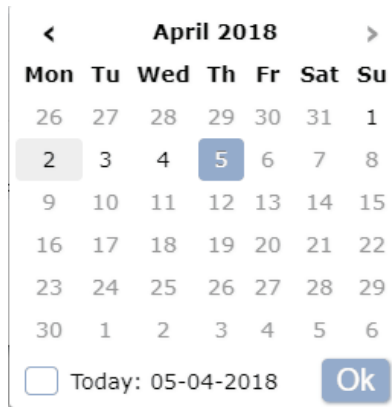
It is possible to select several lines from the list. Hold **Ctrl** button on the keyboard and select desired lines by clicking left mouse button.



### 9.2 Date and time

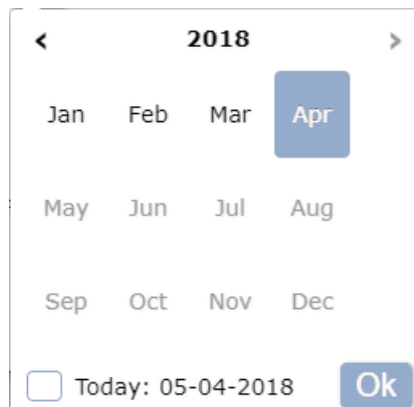
#### Entry of date



To set the date:

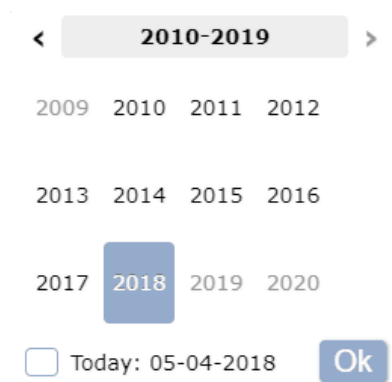
1. Click  button on the page toolbar that is placed on the right side of the date entry field. The calendar panel will appear:




2. Select one of the day of the current month. To set the current date (and time): click **Today** line at the bottom of calendar. Use  and  buttons to switch between months. To select another month: click on the name of the month in the header bar. Month panel will appear:





3. Select one month of the current year. Use  and  buttons in the header to change year. To select another year: click on the name of the year in the header bar. Year panel will appear:

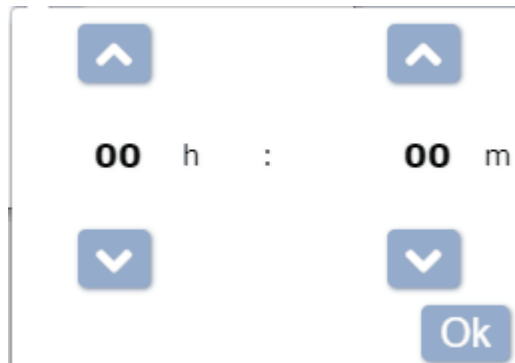



4. Select desirable year on the appeared panel. Specify a name by clicking  side at the bottom of the panel.
5. Click **Ok** after finished. The panel will close, the entried date will appear in date entry field.

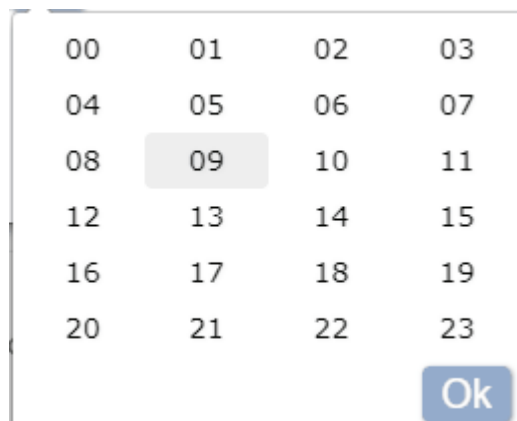
## Entry of time


To set the time:

1. Click  button on the page toolbar or click  sign on the calendar panel. The following panel will appear:



2. Use  and  panel buttons to set the time. Click **Today** line to select the current time. Click on the set time value if you want to set another time value. Additional selection panel will appear:

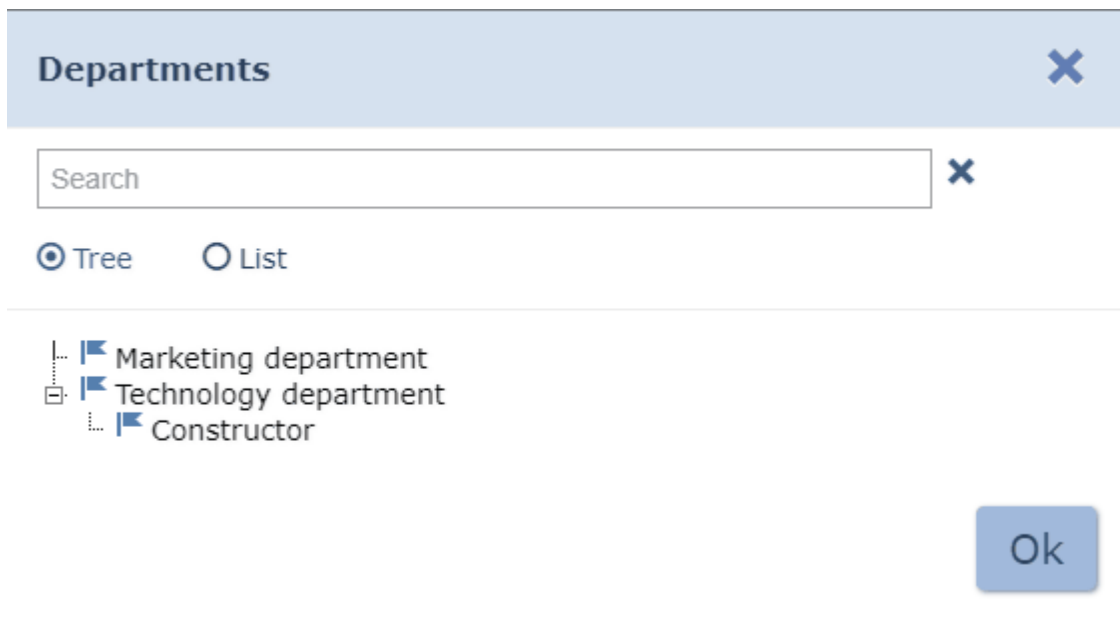


3. Select the desirable value. Click  sign to entry date.
4. Click **Ok** button after finishing. The panel will be closed and specified time will appear in the time entry field.

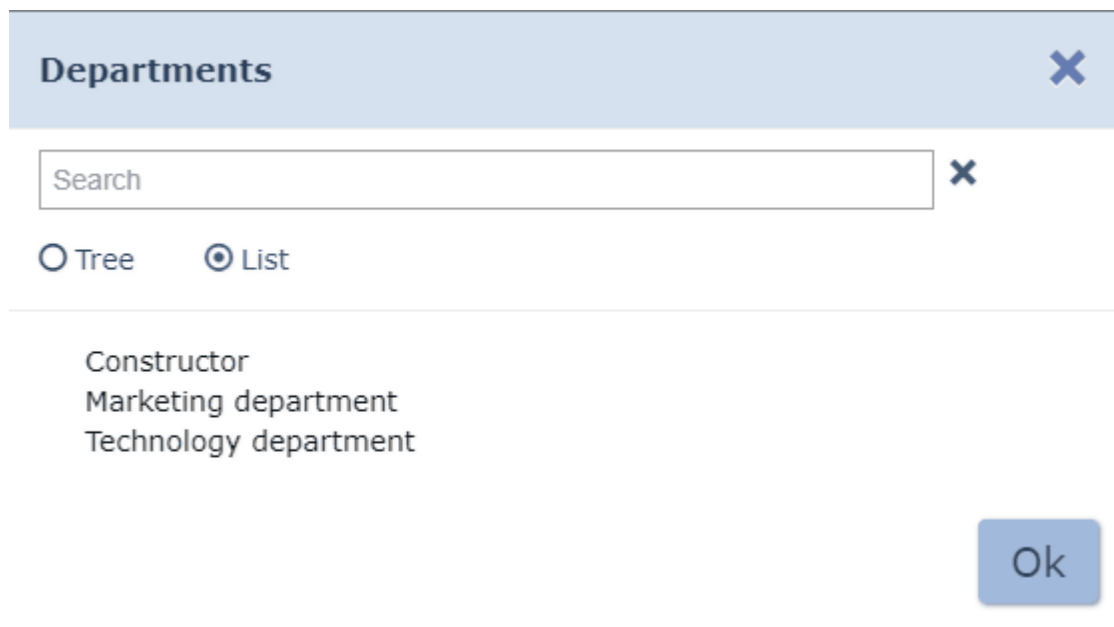
## 9.3 Selection of the department

The List of departments can be created in the «**Departments**» subsection of «**Staff**» section. To select a department:

1. Click **Select from list**  button on the page toolbar that is located on the right side of the **Departments** field. **Departments** window will appear:



2. Select the desirable variant of displaying of the Departments list by using **Tree/ List** selector. The list of departments can be displayed as a drop down list or as a combined list. Window overview:



3. Click on the name of desired department.

**Important:**

It is possible select several departments from the page working area.

- To select several departments: select them while holding **Ctrl** button on the keyboard.
- To select several Departments in a row (on the same level): consequently select first and last department while holding **Shift** button.
- Use **Ctrl+A** key combination to select all departments.

4. To find a department: enter the name of the department in the **Search** field. Target department will be marked yellow on the page working area.

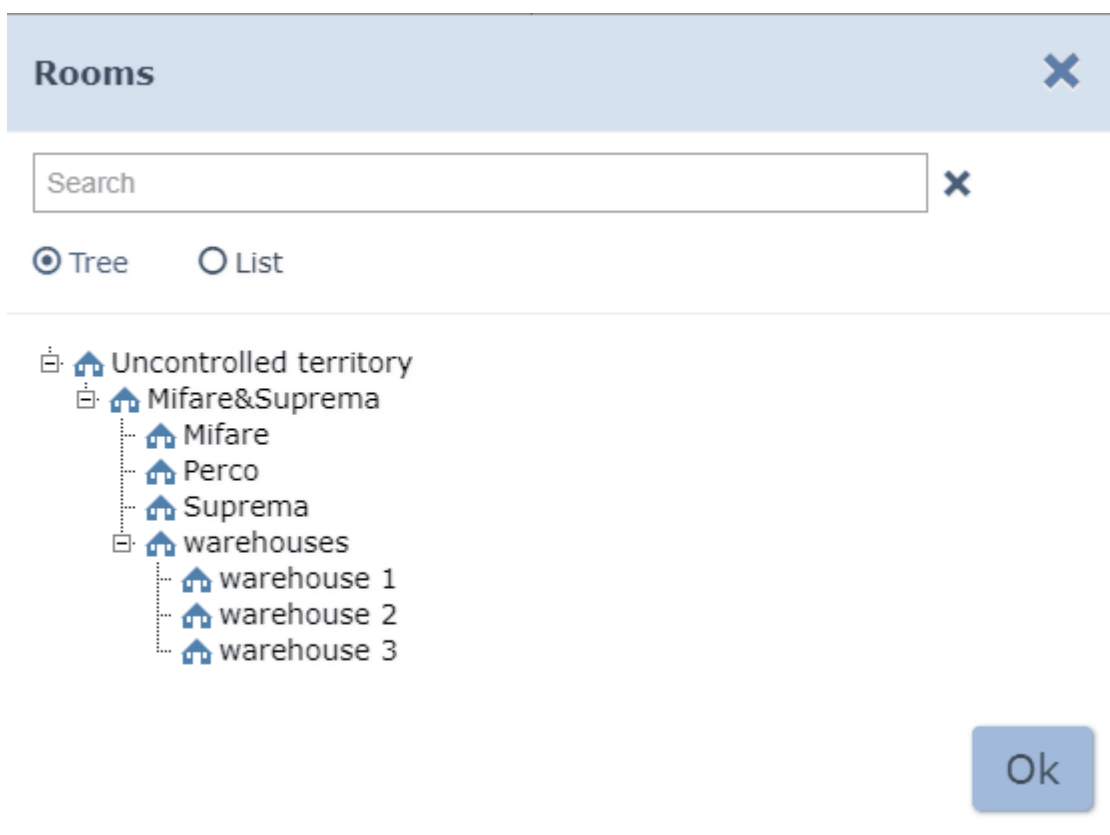


5. Click **Ok**. The **Department** window will close. Name of the selected department will appear in the **Department** field.
6. The list of employees/visitors of the selected department and associated departments will appear on the page working area. The department of every employee/visitor will be indicated on the **Department** column.

## 9.4 The selection of premises

A multilevel list of premises can be created in the «**Configuration**» subsection of the «**Administration**» section. To select the department:

1. Click **Select from list**  button on the page toolbar that is located on the right side of the **Rooms** field. The **Rooms** window will appear:



2. To find a premise: enter the premise name in the **Search** field. Target premise will be marked on the page working area.
3. Click **Ok**. The **Rooms** window will close. Name of the selected Premise will appear in the **Rooms** field on the page toolbar.

## 9.5 Adding Images

Images panel overview:



**Images:** – Use the drop down list to select a category of image that will be uploaded. It can be a photo of employee/ visitor or any other type of graphic data.




**Upload from PC** – click this button to load image from PC.



**Delete image** – click this button to delete the previously loaded image.

## 9.6 Search

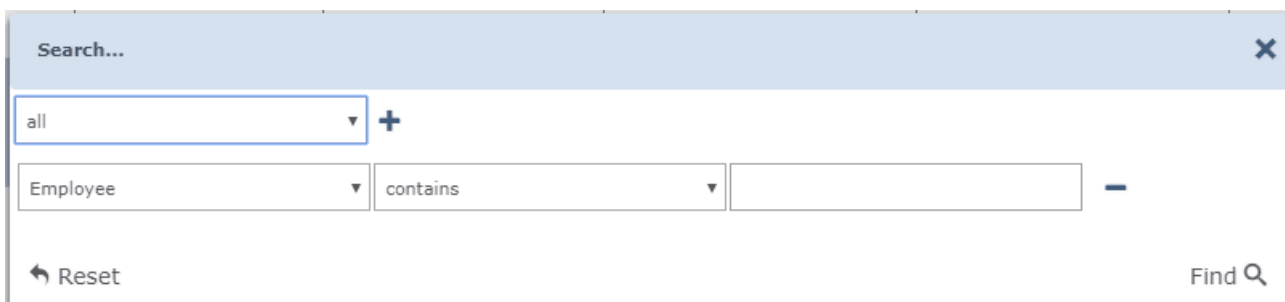
To search by column elements from the page working area:

1. Click the column header which will be used for searching while holding **Ctrl** button on the keyboard. The column will be selected.
2. Enter search request in the **Search** field. The search results are filtered while you are entering the request.
3. Click **Reset**  button on the toolbar to display all results. This button is located on the right side of the **Search** field.




## 9.7 Advanced search

The advanced search option allows to apply filters to data that is displayed on the page working area. To apply a filter:

1. Click **Advanced search**  button on the page toolbar. **Search...** window will appear:




2. To add search criteria: Click **Add**  button. Search criteria selection line and sample entry line will be added to the window:

3. Specify the search criteria, logical operator and sample by using the drop down lists.
4. Click **Add**  to add additional criteria. Click **Delete**  button for deleting. Click **Reset** button to reset all filters.
5. Click **Search** button to apply all filters. All results that match the criteria will be added to the page working area.
6. Click **Reset**  button to display all data.

## 9.8 Search of access cards

To find card by its number:

1. Click **Find Card**  button on the right side of the **Card** field. **Find Card** window will appear:

2. Enter the card number manually or present this card to one of the readers that are connected to the controller.


### **Important:**

The controller which is used for reading the card numbers is specified individually for every operator (in the **Controller** field) from [«Operators»](#) subsection of **«Administration»** section.

3. Click **Ok**. The **Find Card** window will close. Employee/ Visitor data line will be marked on the page working area.

## 9.9 Access card issuing

To enter the card number:

1. Click **Issue card**  button on the right side of the **Cards** field. **Issue card** window will appear:



2. Enter the card number manually in the appeared **Issue card** window.

### **Important:**

The access card number value depends on parameters that are applied in «**Administration**» -- «**Controller general parameters**» -- «**Readers operation mode**». The number of issued card is defined by the **Number Generation** parameter when the **Protected area reading** option is applied to **With card recording** parameter:

- **Manual input** – the card number must mbe entered manually during issuing procedure;
- **Random number** – the card number will be generated randomly;
- **In ascending order** – the card number will be generated by the program according to its internal algorithm.

Or present the card to one of the readers. The reader will personify the card prior to performing writing operation. (it will define the card type – Classic, ID, Plus (SL1, SL2, SL3), DESFire EV1, Ultralight C).

### **Important:**

- The reader selection for card issuing is individual for every operator. This can be configured in "Operators" subsection of the «**Administration**» section.
- It is necessary to specify a controller which will use all reader that are connected to it. To do this: specify the controller in the **Controller** field.
- It is necessary to check the **Reader** box in order to use the reader. In this case it is necessary to install additional software that will be automatically downloaded from the system server.

3. Click **Ok**. The **Issue card** window will close and entered card number will appear in the **Card** field.

## 9.10 Fingerprints scanning

**Fingerprints** Additional data panel can be used for entering fingerprints of one or more fingers. These fingerprints will be used for performing verification procedure by the selected scanning device.

Window overview:



1. **Add finger** – click this button to add a finger for scanning.
2. **Scan** – click this button to launch the fingerprint scanning procedure.

**Important:**

The scanning procedure for every finger will be performed twice for the security improvement purposes.

3. **Delete** – click this button to delete the selected finger.
4. **1, 2 ...** – buttons which can be used for switching between scanned fingers.
5. **Quality** – a scale that allows to change the scanning quality. The current value is displayed in the field on the right side of the scale.

**Important:**

The high scanning quality improves the image acutance and as a result it provides higher protection level from unauthorized passage. At the same time the scanning failure rate increases (it is caused by the scanning detection failures during verification), i.e. – the necessity of additional scanning increases.

6. Display areas contain the scanning results of first and second scanning attempts.

## 9.11 Cards printing




The cards printing is possible after you've created a template. You can create and edit a template in the [«Card design»](#) subsection of **«Pass office»** section.

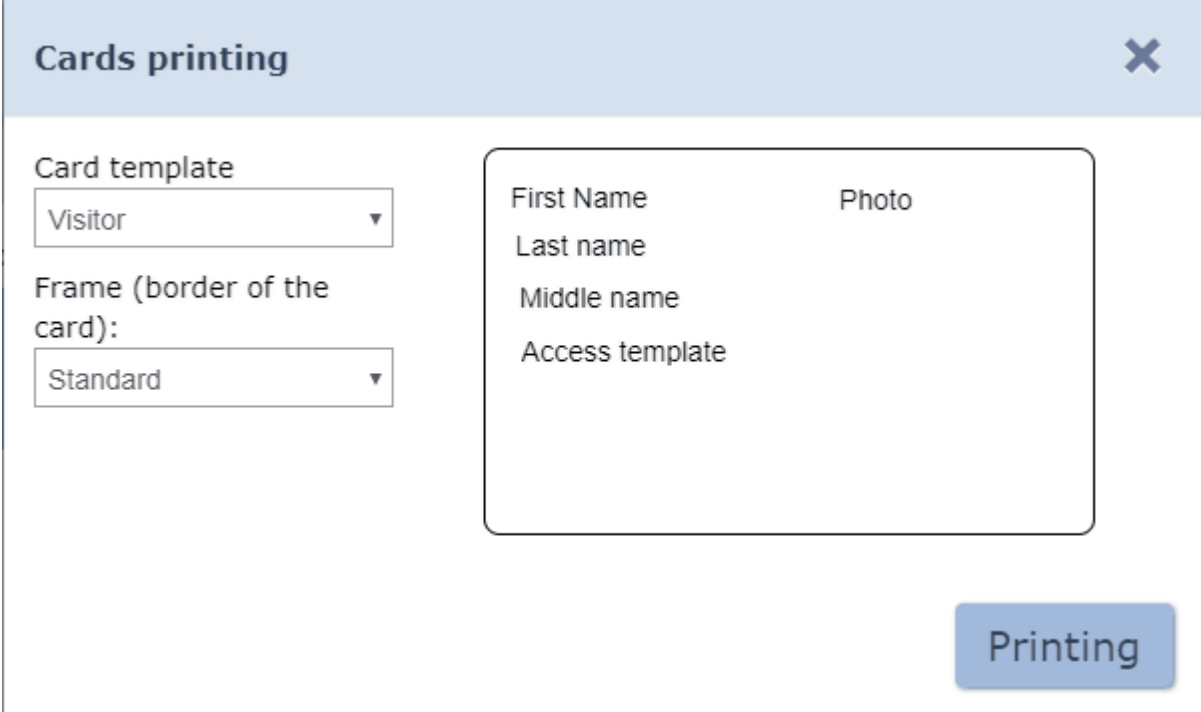
**Important!**

It is impossible to use *Microsoft Edge* browser for printing.

To print an access pass for employee/ visitor based on the previously created template:

1. Select one or more employees/ visitors.

2. Click **Cards printing**  button on the page toolbar (or **More**  button and click  **Cards printing** button). **Cards printing** window will appear:



The screenshot shows a window titled "Cards printing" with a close button (X) in the top right corner. On the left side, there are two dropdown menus. The first is labeled "Card template" and has "Visitor" selected. The second is labeled "Frame (border of the card):" and has "Standard" selected. To the right of these menus is a preview area showing a card layout. The card has a header with "First Name" and "Photo", followed by "Last name", "Middle name", and "Access template". At the bottom right of the window is a blue button labeled "Printing".

3. Select a template from the **ID Card template** list. Selected template will be used for printing.
4. Change the printing area by using the drop down list **Frame/ Pass border**.
5. Click **Print** button. The page that contains the list of passes and a standard print dialogue box will appear.

### Printing passes on ID cards

It is necessary to use special «Primacy» printer. In order to use this option it is necessary to:

- disable margins;
- select **CR80** value for the **Paper size** parameter.

It is not recommended to use *Microsoft IE* for printing. It is necessary to set the paper margins not less than 5-7mm.



### Printing passes on paper

In order to use this option it is necessary to:

- disable headers (set value to **none**);
- tick the **Print background** parameter.



## 9.12 Print spread sheet data

To print the data from the page working area:

1. Configure display parameters before you start printing. To do this:
  - disable the display of columns you don't need,
  - sort data by column elements,
  - configure the column width.
2. Click **More**  button on the page toolbar and select  **Table print** command in the appeared window. The data page and standard **Print** dialogue box will appear.

## 9.13 Data export

To export data from the page working area to a file *.CSV* or *.XLS*:

1. Generate a report prior to printing, i.e. specify a period, users category, department etc.
2. Click **More**  button on the page toolbar and select **XExport into XLS** or  **Export into CSV** command. The standard saving procedure will be performed.

## 9.14 Data import

It is possible to import the list of positions, departments, employees and visitors personal data. Note that it is possible to import the hierarchy structure of the departments. The symbol "/" is used for separation of the nesting levels.

### **Important:**

Employees/Visitors full names and the department must be indicated for data import. Specified department and the position must match data that exists in the system.



## Preparing file for importing

Prepare the data file for importing. Note that it has to comply with the following requirements:

- Spreadsheet file with *.XLS*, *.XLSX* or *.CSV* extension.
- It must contain 1 page.
- The first line must contain names of the columns for specifying the data types.
- The content of each imported cell with **Name**, **Last name**, **Middle name**, **Department** must not exceed 150 symbols, **Position** – 255.

## Data import

To import data:

1. Click **More**  button on the page toolbar and select  **Import from XLS, XLSX, CSV** command. The standard browser window will appear.
2. Specify the location of data file and click **Open** button. **Import from XLS, XLSX, CSV** window will appear:


**Import from XLS, XLSX, CSV**
✕

<b>Where to save:</b>	<b>What to save:</b>			
* <b>Last name</b>	←	Positions	▼	✕
* <b>First Name</b>	←	About	▼	✕
Middle name	←		▼	✕
Employee ID	←		▼	✕
* <b>Department</b>	←	Positions	▼	✕
Position	←		▼	✕
Work schedule	←		▼	✕
Access template	←		▼	✕
Card (Number)	←		▼	✕

---

\* - **required fields**

Ok

3. Select the names of the column which will be imported. Click **Ok**.
4. The import process will start. A dialogue box will appear in case of import errors. Click **Ok** to close the window.
5. It is possible to save employees data to as a separate file if the data has been imported selectively. To do this: Click  **Export the rest to file** button after the importing process has been finished.
6. Click **Ok** button to finish the export operation. **Import from XLS, XLSX, CSV** window will close. The imported data will appear in the system DB.



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