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Access Portal

QUICK START GUIDE



ACCESS
portal

Scope of Document

The first section of this Quick Start Guide serves two purposes:

1. It gets you through the first stages of setting up a system.
2. It familiarises you with the layout philosophy of the application, enabling you to interact with the rest of the application without having to wade through a bulky manual.

The second section is an index that gives you the menu path for the function you are after. This will be particularly handy when you are just starting – or using a function for the first time.

Document Conventions

We use the following conventions in this document:



Note – points out extra information



Tip – points out alternative methods to perform a task



Important – points out important information



Warning – points out potential danger to you or the product

Before You Begin



*The Web User Interface will run reliably on the following:
Chrome (30.0.1599.101), Internet Explorer (10), Firefox (24.0)
– or later versions of these browsers.*

1

Setting up and familiarisation

Accessing the Access Portal Web User Interface over a LAN

1. Establish the IP address for the machine that Access Portal is running on.
2. Save this IP address as an **Access Portal Shortcut** URL on your desktop.
3. Double-click on this **Access Portal Shortcut** and a browser window will come up with the Access Portal Login Screen.
4. You will be prompted for the **User Name** and **Password**:

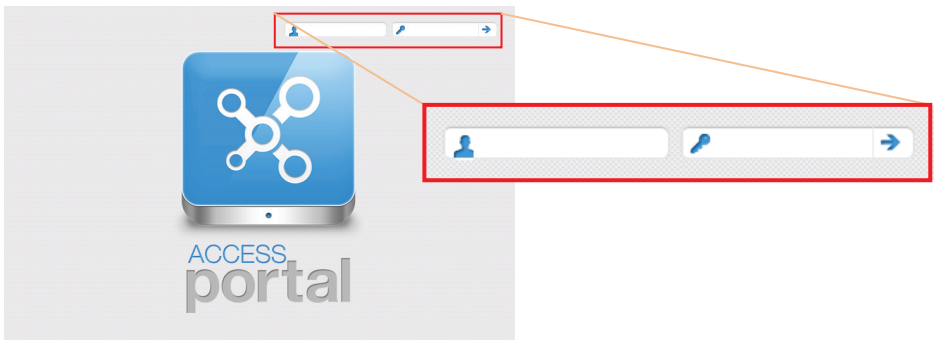


Figure 1 – Login Screen with **User Name** and **Password** prompt



The start-up defaults are:

User Name : *sysdba*

Password : *masterkey*

5. Enter these in the fields provided and Access Portal will start up, presenting you with the **Live!** Screen as shown on the next page.

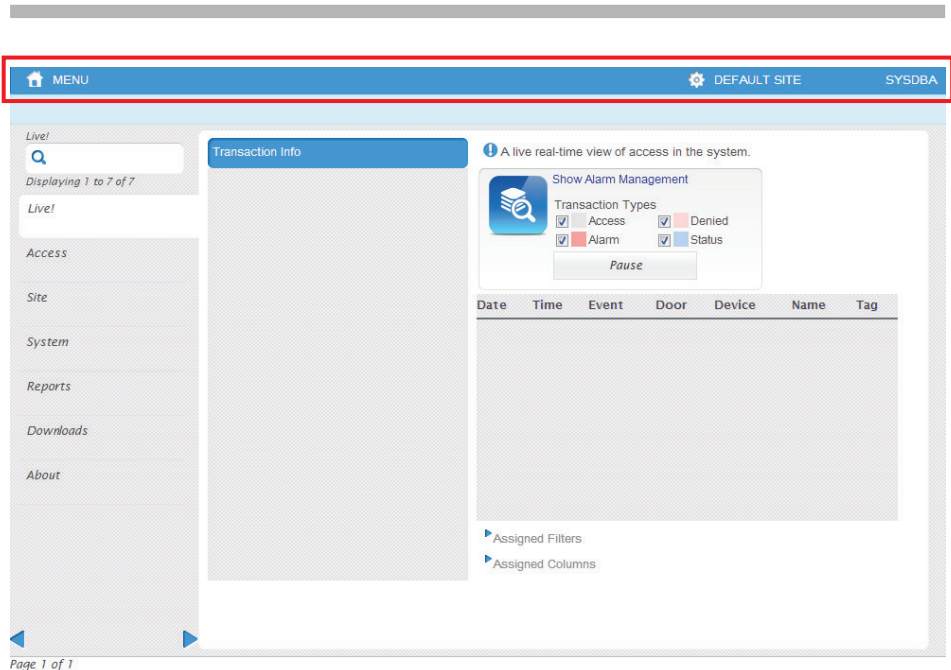


Figure 2 – The Live! Screen

The top blue ribbon (Highlighted by the red rectangle) shows the following:



Click this to bring up the **Main Menu**, which is the list presently displayed down the left hand side of the screen.



This shows the name of the site to which any **new records** will be saved. Clicking on this would bring up the **Site Selection** Options.



This shows the **User Name** that was used to log into this session. Clicking on this will allow you change the current User's password, or go to the profile (for this User Name), or logout, ending this session.

The top blue ribbon is where you will find available options for whatever action it is that you are busy with (**Save, Delete**, etc.) – more on this later.

Installing the necessary Hardware Clients

If you are accessing the Access Portal Web Application on a computer other than the AP System Server, and you wish to connect a USB Enrolment Reader of some description, you will need to first run the necessary Client Installer.

1. Navigate: **Menu > Downloads**
2. Click on the installer for the Client you need.

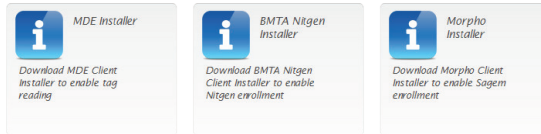


Figure 3 – Client Installer Options

3. Save the executable install file to a suitable folder
4. Repeat until you have all those that you need.
5. Run the installer/s

Installation of Controllers (and associated readers, etc.)

1. Click on **Site** in the menu list on the left side of the screen:

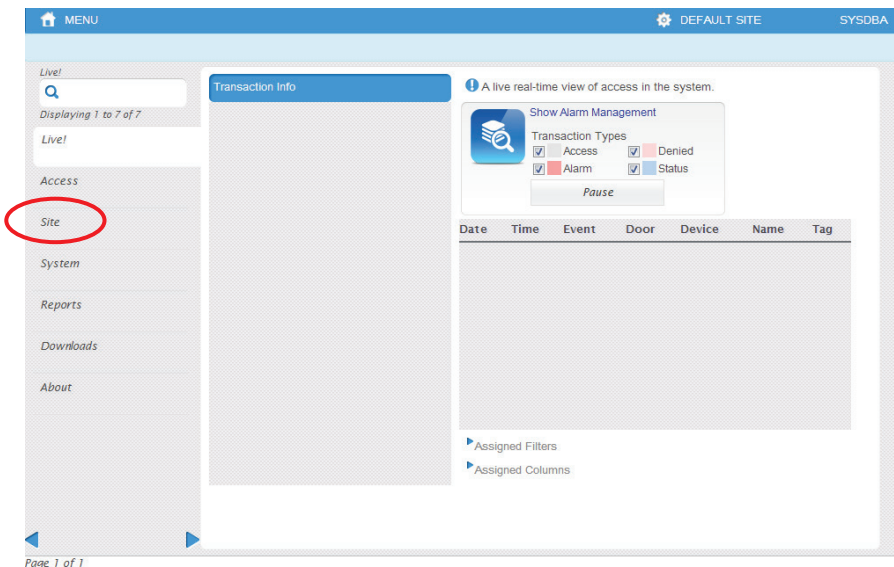


Figure 4 – The Live Screen

2. Click on **Install**

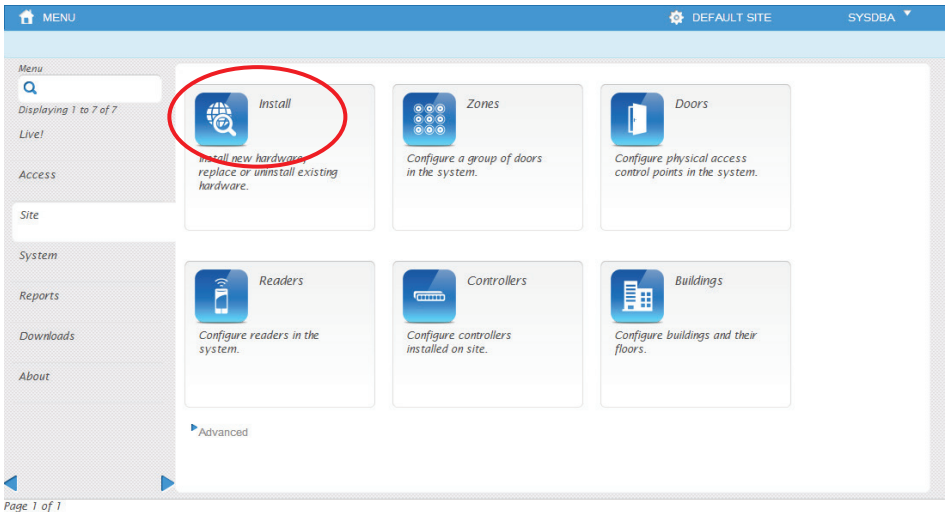


Figure 5 – Site > Install

3. Clicking on **Scan Network**, (below) will cause the system to discover all the Controllers that are present on the network, populating the list on the left of the **Site > Install** Screen.

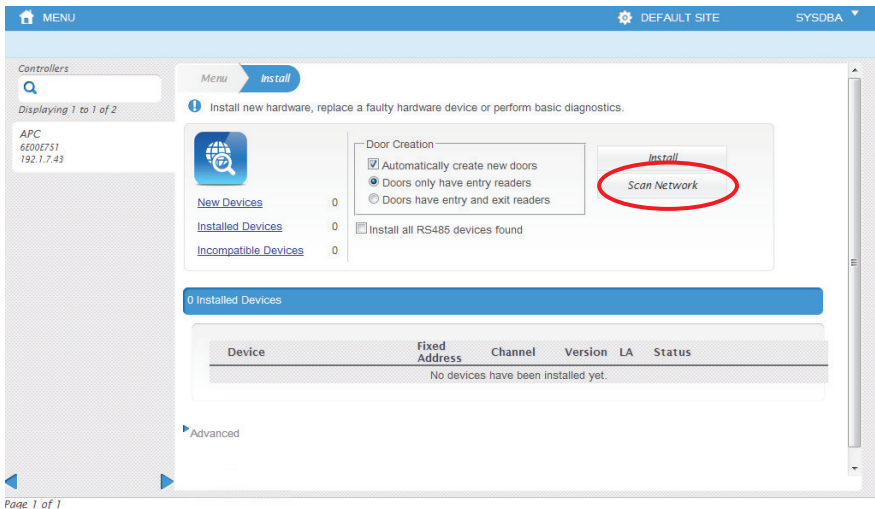


Figure 6 – Site>Install > Scan Network

- The light blue ribbon just beneath the top blue ribbon on the screen will tell you that the System is being scanned... this can take a few minutes:

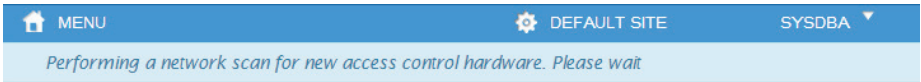


Figure 7 –Network Scan in Progress...

- When the scan is complete, a light green ribbon lets you know that any changes to the system hardware have been Saved:



Figure 8 – Network Scan complete

- All the Controllers detected will be listed in the column on the left hand side of the screen. You will be prompted to select which of the detected controllers that you would like to install, or view. (Controllers with an asterisk* are currently NOT installed):

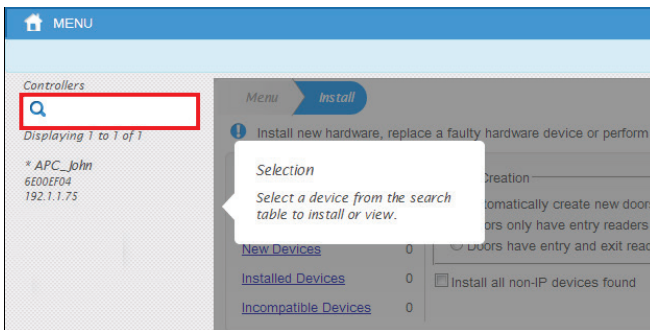


Figure 9 – Locate and Select Controller to Install or View



If there are many controllers on the site, the quickest way to find the one you are after would be to enter its Fixed Address in the search dialogue at the top of the list (inside the red highlight.) – You should be able to look up the necessary Fixed Addresses from the Installation Site Plan.

7. When you have selected a Controller from the list (only one at a time may be selected), the main screen area is no longer greyed out, and you are now able to select the **Door Creation Options**:

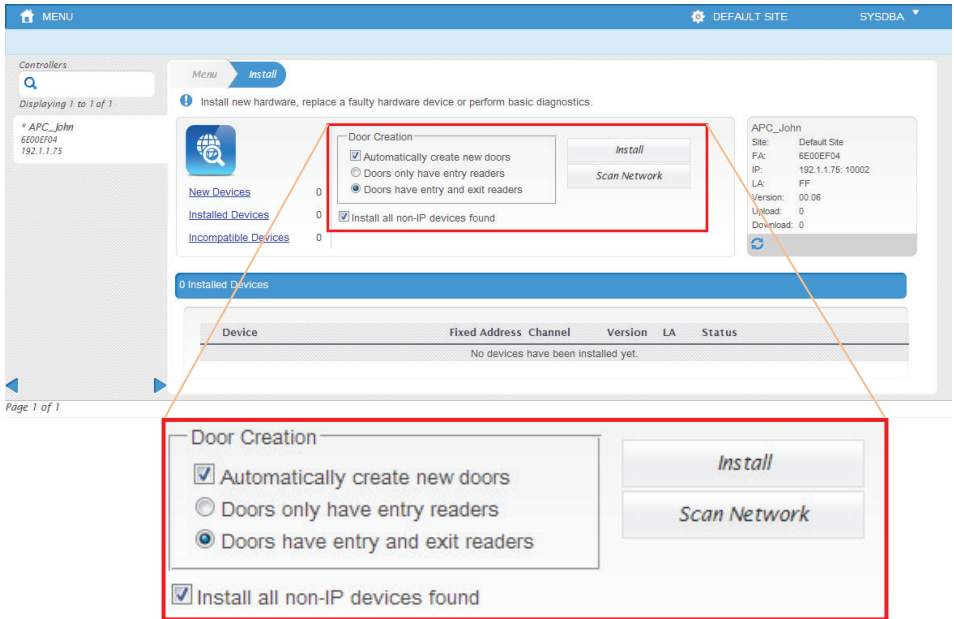


Figure 10 – Door Creation Options

8. Automatic door creation can save on setup time. It is recommended that you tick the **Automatically create new doors** option, and then select whether the doors (associated with this controller) have only entrance readers, or both entrance and exit readers.
9. To include all non-IP devices that are connected to this Controller, (including Expansion Modules that are clustered with a Cluster Controller Module) also tick the **Install all non-IP devices found** option.
10. After selecting the Door Creation Options, click on **Install**, and the system will install the Controller and any Readers that are connected to this Controller.

11. After a delay the devices attached to the Controller are listed:

The screenshot shows the APC_John web interface. The top navigation bar includes 'MENU', 'DEFAULT SITE', and 'SYSDBA'. The main content area has a 'Menu' dropdown with 'Install' selected. A message states: 'Install new hardware, replace a faulty hardware device or perform basic diagnostics.' Below this are 'Door Creation' options: 'Automatically create new doors' (checked), 'Doors only have entry readers' (unchecked), and 'Doors have entry and exit readers' (checked). There are 'Install' and 'Scan Network' buttons. A summary box on the right shows controller details: Site: Default Site, FA: 8E0DEF04, IP: 192.1.1.76: 10002, LA: 01, Version: 0.6, Upload: 0, Download: 0, and 'Installed 4 (100%)'. Below the summary is a table titled '4 Installed Devices' circled in red:

Device	Fixed Address	Channel	Version	LA	Status
RT: 00575E86	00575E86	RS485	7.0	02	
RTMDK: 00575E85	00575E85	RS485	7.0	01	
TTR: 00576023	00576023	RS485	7.0	04	
TTR: 00576022	00576022	RS485	7.0	03	

Figure 11 – Devices connected to the Controller are listed

12. After a further delay, the green dot indicators (●) show that secure communications with the Controller and its devices has been established. (Total controller install time can be up to two minutes per controller.)

The screenshot shows the same APC_John web interface as in Figure 11. The '4 Installed Devices' table now has green dots in the 'Status' column for all four devices. A red circle highlights a green dot in the top right corner of the interface, near the controller details.

Figure 12 – GREEN indicators go RED when Communications is lost

Configuring Doors



If you performed Automatic Door Creation, the doors associated with the Controllers that you have installed will now have names like “Quick Door 1”, “Quick Door 2”, etc.

It would be best to rename these doors with names that make sense to the users of the building

If you are unsure of the physical locations of these “Quick Doors”, go to **Menu > Site > Readers**. Using the Fixed Address listed for each reader, note on your site map where these “Quick Doors” are, then you are ready to do the following:

1. Go to the Door Configuration Screen (**Menu > Site > Doors**)
2. Select the door you wish to rename and type the correct name for this door into the Door Name field.




The screenshot shows the 'Doors' configuration screen. At the top, there is a blue ribbon with a 'MENU' icon and the text 'There are unsaved changes for this selection'. Below this, a search bar is labeled 'System Doors'. A list on the left shows 'Quick Door 1 Default Zone' and 'Quick Door 2 Default Zone'. The main configuration area has a 'Menu' tab and a 'Doors' sub-tab. A blue information icon indicates 'Configure physical access control points in the system.' The configuration form includes a door icon, a 'Name' field (Quick Door 1), a 'Zone' field (Default Zone), and several other fields: 'Door Name' (Front Door, circled in red), 'Entry Reader' (Quick Door 1 (IN)), 'Exit Reader' (Quick Door 1 (OUT)), 'Building', 'Floor', and 'Zone' (Default Zone). Each of the last four fields has a blue arrow icon and a trash can icon to its right. A blue 'SAVE' button is located in the top ribbon.

Figure 13 – Replacing the default Door Name

3. Click on **SAVE** (in the blue ribbon at the top) to save the new name, and the readers associated with this door are automatically renamed accordingly.

Shortcut Icons



You may have noticed the    icons on the right of the items on the previous page...

These icons are live shortcuts to actions that you can perform on the data in those fields:



takes you to a list of available alternatives to choose from.



allows you to create a new alternative.



deletes the data in this field.

Quick-Enrolling a Tag from any reader

1. Present a tag to any one of the installed readers
2. Go to the live! Screen (**Menu > Live!**)
3. The live display will show the scanned tag listed in the transaction column as per the following figure:

The screenshot displays the 'Live!' interface with a sidebar on the left containing navigation options: Live!, Access, Site, System, Reports, Downloads, and About. The main content area is titled 'Transaction Info' and includes a search bar, a 'Live!' button, and a 'Show Alarm Management' section with checkboxes for Access, Denied, Alarm, and Status. A table below shows a single transaction record:

Date	Time	Event	Door	Device	Name	Tag
2013-10-25	11:33:31	Denied Location Locked In	Front Door	Front Door (IN)		18845410082

A red box highlights the transaction record in the table. Below the table, a magnified view of the record is shown, with the 'Quick Enrol' link circled in red.

Transaction Info

Unknown User
2013-10-25 11:33:31
Front Door
Denied Location Locked In
Quick Enrol

Show Alarm Management

Transaction Types

Access Denied
 Alarm Status

Pause

Date	Time	Event	Door	Device	Name	Tag
2013-10-25	11:33:31	Denied Location Locked In	Front Door	Front Door (IN)		18845410082

Assigned Filters

Assigned Columns

Page 1 of 1

Unknown User
2013-10-25 11:33:31
Front Door
Denied Location Locked In
Quick Enrol

Figure 14 – Scanned tag displayed on the Live! screen

4. When you click on the **Quick Enrol** link, that tag is **instantly** enrolled. You will be taken to the Tagholder configuration Screen.

- Here you can fill in all the necessary information about the person who is the holder of this tag.

The screenshot displays the 'Tagholder' configuration page. The 'BASIC' tab is selected, showing the following fields:


First Name	New Tagholder 2	Department	
Last Name	QE	Company	
ID Number	New_Tagholder_2	Title	
Display Name	Quick Enroll 2	Suffix	
		Second Name	
		Gender	Male

The fields for First Name, Last Name, ID Number, and Display Name are highlighted with a red box, indicating they are mandatory. The interface also includes a sidebar with navigation options and a top navigation bar with 'MENU', 'NEW', 'BACK', 'DEFAULT SITE', and 'SYSDBA'.

Figure 15 – Configuring a New Tagholder (Mandatory Fields enlarged)





First Name, Last Name, ID Number and Display Name are all mandatory for the record to be saved. If left empty, mandatory fields become red to remind you to fill them in.

- Complete all mandatory (and any other desired information), and then click on  (in the blue ribbon at the top of the screen) to commit your changes.

Adding a new Tagholder



If you wish to allocate Personal Access Codes - or Fingerprint Templates, and you haven't already added that person as a Tagholder you will first need to do the following:

1. Navigate: **Menu > Access > Tagholders**, and then click on  on the top blue ribbon.
2. Complete all the necessary fields (Red fields are mandatory).
3. Be sure to  the new Tagholder when you have completed all the necessary fields.

Empty Space

Enrolling a Tag from an Enrolment Reader



You will need to have an enrolment Reader plugged in - and the TagReader Client installed (See page 5), before this will work.

1. Go to **Menu > Access > Tagholders**, and select the Tagholder to whom you wish to allocate the new tag.
2. Click on **Tags and Biometric Templates** (highlighted in the picture below).

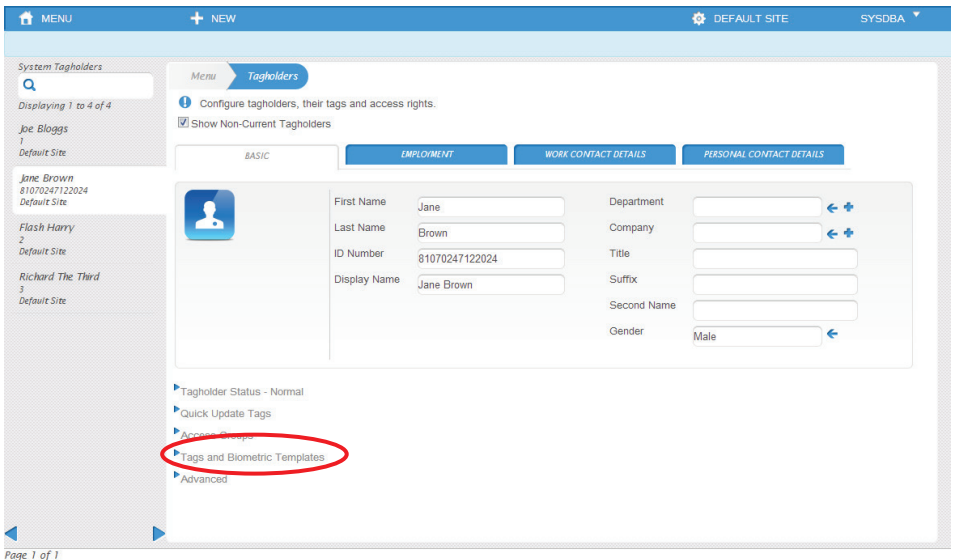


Figure 16 – Select **Tags and Biometric Templates**

3. A blue ribbon will appear under the **Tags and Biometric Templates** heading, indicating how many tags this Tagholder has been allocated (a maximum of four is possible). Click on the gear icon on the extreme right of this blue ribbon.

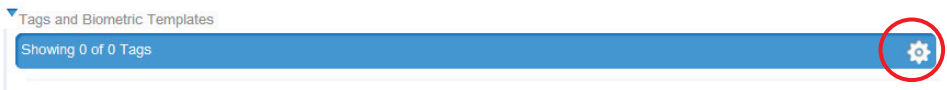


Figure 17 – Click on the Gear Icon

- A tag enrolment dialogue will open. Place the tag to be enrolled on the enrolment reader and click on **Read Tag**, as shown in the figure below:

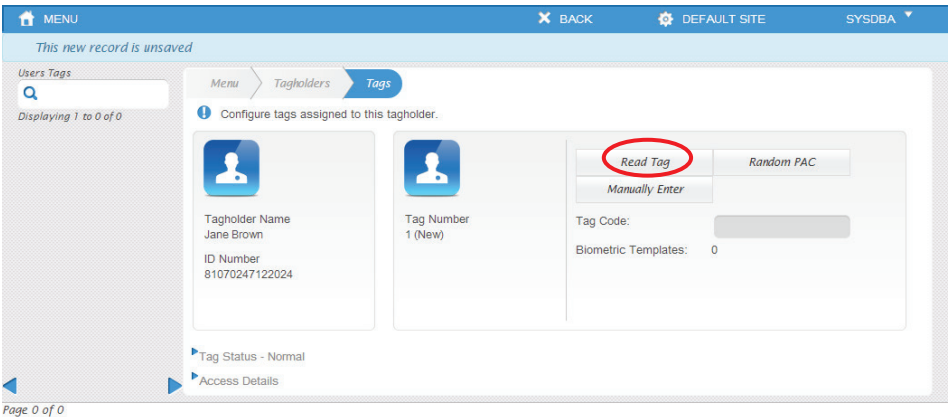


Figure 18 – Click on **Read Tag**

- The Tag will be scanned and the Scanned Code is displayed :

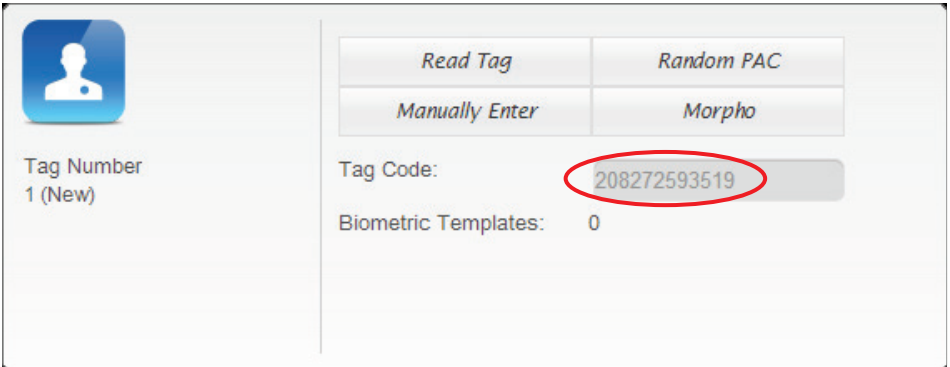


Figure 19 – Scanned Tag Code appears

- To add this **Tag** to this **Tagholder**, you need to click on **SAVE** on the blue ribbon at the top of the screen:



Figure 20 – Click on **Save** to commit this Tag to the selected Tagholder

Setting a PAC (Personal Access Code)





The Personal Access Code is a code number that may be used in place of an RFID tag. (The “Tagholder” types this number (followed by #) into a keypad to gain access). This new code may be entered manually, OR a random code can be automatically generated.




There are two requirements that must be met before you can use PAC access to the system:

- *The door must have a keypad or reader that is equipped with a keypad.*
- *The Reader Behaviour in question should be configured for PAC Mode – See page 18.*

1. Follow steps 1 to 3 on page 15.
2. Click on  to initiate a NEW Tag record.
3. Click on **Manually Enter**, or **Random PAC**.
4. Click on  (in the top blue ribbon) to save the new tag.
5. If the PAC already exists on the system, you will not be able to save the tag – in this case, enter an altered PAC – or generate another random PAC, repeat until saving is successful.


Setting a PIN (Personal Identification Number)

1. Navigate: **Menu > Access > Tagholders**
2. Choose the Tagholder who you wish to allocate a PIN (listed in the left column on the screen) – if the Tagholder Doesn't exist see page 14 for Adding a New Tagholder.
3. Click on Advanced (at the bottom of the main screen area).
4. Type the PIN into the PIN field.
5. Save the PIN by clicking on  in the top blue ribbon.

Reader Behaviour Configuration




Readers are allocated behaviour profiles together with associated time profiles to define how they behave at different times. In this example we configure Reader Behaviour so that it will accept a Personal Access Code entered on its keypad

1. Navigate: **Menu > Site > Advanced > Reader Profiles**
2. Select a reader profile from those listed in the left margin.
3. Click on **Behaviour** (Top option listed at the bottom of the main screen)
4. Click on the  icon at the end of the blue ribbon under **Behaviour**.




The main screen area will be greyed out. The menu down the left side of the screen will list all the Device Behaviour options.

5. Click on **Personal Access Code**
6. Click on **Door Mode Access Pattern**
7. Click on the  icon at the end of the blue ribbon
8. Fill in the **red fields**; first give the new Door Mode Pattern a name.
9. When you click on the **Based on** field, the screen will grey out and you will be prompted to select from the options listed in the left margin. Only the **Personal Access Code Assigned to All** option will be available, click on this.
10. Click on **Select Time Pattern**
11. The main screen will grey out and you will be prompted to select from the Time Patterns listed down the left column. Click on a time pattern that suites your needs.



*If the **Time Pattern** you require does not exist, you can come back and replace this once you have created another **Time Pattern** (**Menu > Site > Advanced > Device Time Patterns**)*

12. Remember that you MUST always  your changes (top blue ribbon), or they will not be effected.

Where do I find what I am looking for?



This index lists all the **available functions** in alphabetical order, followed by the *menu path in blue italics*.



Tip – Use the **Find** facility in Adobe Acrobat (ctrl – f) to look for keywords you are after to find what you are looking for.

Access Rights – Actions on Entry

[Access](#) > [Access Rights](#) > [Actions \(Coming in\)](#)

Access Rights – Actions on Exit

[Access](#) > [Access Rights](#) > [Actions \(Going out\)](#)

Access Rights - Area selection

[Access](#) > [Access Rights](#) > [Area](#)

Access Rights - Set Start and End dates

[Access](#) > [Access Rights](#) > [Advanced](#) > [Start Date, End Date](#)

Access Rights - Suspend Group

[Access](#) > [Access Rights](#) > [Advanced](#) > [Suspend](#)

Access Rights - Time pattern selection

[Access](#) > [Access Rights](#) > [Access Time Pattern](#)

Access Rights - When and Where

[Access](#) > [Access Rights](#)

Building - Configure, + New, Save, Delete

[Site](#) > [Buildings](#) >

Client Installers (For MDE, BMTA, Morpho, Nitgen, etc.)

[Downloads](#)

Controller - Configure

[Site](#) > [Controllers](#)

Controller - Zone Profile (select and/or configure) to act on the selected controller

[Site > Controllers > Zones \(Gear Icon\)](#)

Controller (Device) time Pattern Selection and Configuration

[Site > Advanced > Device Time Patterns](#)

Controller Profiles Selection and Configuration

[Site > Advanced > Controller Profiles](#)

Controller Synchronisation

[System > Advanced > Services \(click on "show advanced View" for more options\)](#)

Controllers - Find all Controllers by scanning

[Site > Install > Scan Network \(for Controllers\)](#)

Controllers - Replacing a single controller with another

[Site > Install > Advanced > Replace a controller](#)

Doors - Configure, + New, Save, Delete

[Site > Controllers > Zones > Doors](#)

[Site > Doors](#)

[Site > Zone > Doors](#)

Doors - Create Doors Automatically (On Device Installation)

[Site > Install > Door Creation](#)

Floors - Configure, + New, Save, Delete

[Site > Buildings > Floors](#)

Holidays (Define names and periods)

[Access > Advanced > Holidays](#)

Live display of transactions

[Live!](#)

Live Transactions Column Selection for this session

[Live! > Select Columns](#)

Live Transactions Filtering for this session

[Live! > Assigned Filters](#)

Messages (Configure messages activated by events, etc.)

[Site > Advanced > Messages](#)

Network Settings per Device

[System > Network Settings](#)

Operator Logins (User Name, Password and Profile selection)

[Access > Advanced > Operator Logins](#)

Operator Profiles - Defining Operator Profiles

[Access > Advanced > Operator Profiles](#)

Operator Profiles - Defining Profile-specific filtering

[Access > Advanced > Filter Profiles](#)

Reader Profiles Selection and Configuration

[Site > Advanced > Reader Profiles](#)

Readers - Configure, Save, Delete

[Site > Readers](#)

Report - Tagholders

[Reports > Tagholder Report](#)

Report - Transactions

[Reports > Transactions](#)

Scan Network (for Controllers/Devices)

[System > Network Settings > then select "Scan Network" \(to the right of the settings fields\)](#)

Sites - Configuration + New, Save, Delete

[System > Sites](#)

Tag TYPE Truncation Rules

[System > Advanced > Truncation Rules](#)

Tagholder - Allocating Access Groups

[Access > Tagholders > Access Groups](#)

Tagholder - Allocating Fingerprint Templates

[Access > Tagholders > Tags and Biometric Templates](#)

Tagholder - Allocating Personal Access Codes

[Access > Tagholders > Tags and Biometric Templates](#)

Tagholder - Allocating Tags

[Access > Tagholders > Tags and Biometric Templates](#)

Tagholder - APB Override (Allow consecutive zone entries)

[Access > Tagholders > Advanced >](#)

Tagholder - New, Configure (No Delete)

[Access > Tagholders](#)

Tagholder - PIN

[Access > Tagholders > Advanced >](#)

Tagholder - Report tickbox (this is an ORed request*)

[Access > Tagholders > Advanced >](#)



**Leaving this Report tickbox unticked (the default setting) does NOT prevent reporting on this Tagholder. Ticking this box will ENFORCE reporting on this Tagholder, even when all other report requests are "off".*

Tagholder - Start & Stop Dates

[Access > Tagholders > Quick Update Tags](#)

Tagholder - Status (Current tickbox)

[Access > Tagholders > Advanced >](#)

Tagholder - Status (Select between Normal, Suspend, Suspend with Alarm)

[Access > Tagholders > Tagholder Status](#)

Tagholder - Type (Access Rights Group)

[Access > Tagholders > Advanced >](#)

Time Pattern Selection and Configuration

[Site > Advanced > Device Time Patterns](#)

Time Triggered Actions (Configure actions triggered by a controller at the time specified.)

[Site > Advanced > Time Triggered Actions](#)

User Fields - Configuration + New, Save, Delete

[System > Advanced > User Fields](#)

Zone - Add, configure, Save, Delete

[Site > Zone > Configure](#)

This manual is applicable to: Access Portal Version 1.1.41959			
SAP351-0-0-GB-00	Issue 01	October 2013	IMPRO\Access Portal\Access Portal Pro Software Manuals\English Manuals\LATEST ISSUE\APQSG-swmb-en-01.docx