prodatakey

SmartAccess Rules User Manual

smart access

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Introduction

The SmartAccess Rules application is driven by our desire to make access control smart, reliable, and easy to use. We have taken all of the robust features required for a powerful access control system, added a few more, and put them in an intuitive and logical design.

SmartAccess Rules will save you time in programming and simplify the training process for the end user. Help icons provide additional information and are found throughout the software.

Key Features

- ✓ Clean tab layout
- ✓ Automatic rule queries provide optimized rule views
- ✓ Fast sort option
- ✓ Powerful search features
- ✓ Integrated search feature
- ✓ One-to-many logic
    - o One trigger to cause many actions system wide
    - o One rule to control multiple doors, elevators, or devices
- ✓ Virtually unlimited:
    - o People
    - o Cards
    - o Access rights
    - o Schedules
    - o System events
- ✓ Multiple or single day scheduling
- ✓ Existing data is quickly edited

Accessing SmartAccess Rules

1. Double click on the SmartAccess Rules icon on the desktop.

Note: A Security Warning may appear. If the warning appears select **Run** to continue.
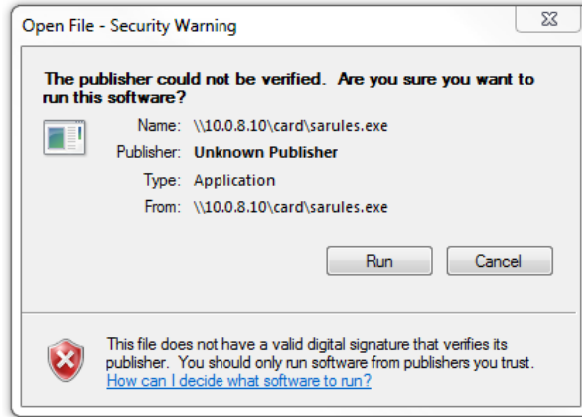
2. Enter the Administrative password (**Default: P@ssword**). **Push Enter** on the keyboard.
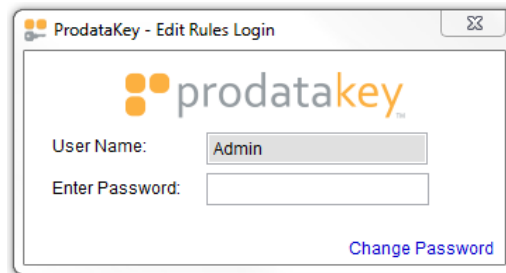
Note: To change the password click the **Change Password** link shown above. For current password enter **P@ssword** then enter the new password twice. Click **Set Password**. A pop up window will confirm the password was changed. Click **OK**.
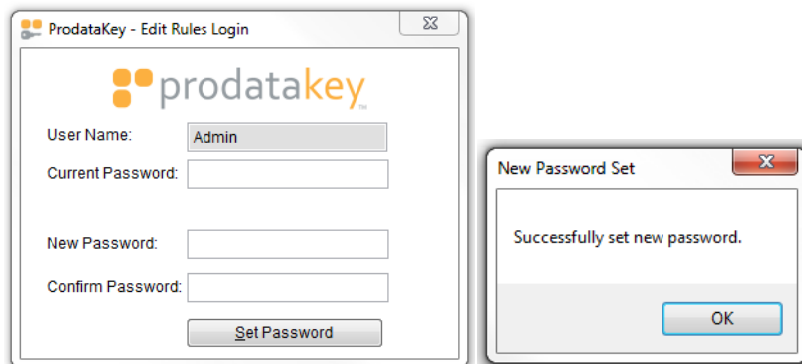
People Tab

This tab is used for adding and editing all users in the system. Each person can be configured individually with personal cards, group access, personal rules, and a picture. Individual people may have special access rights outside of the group(s) applied to them.
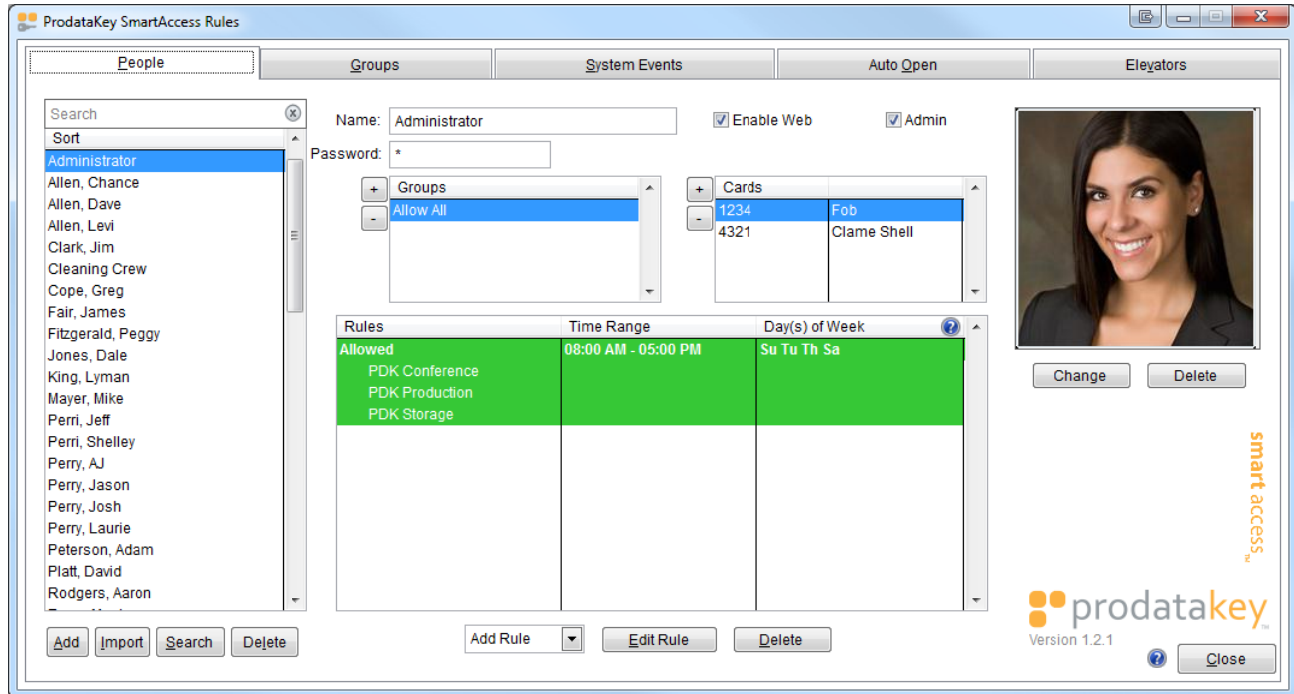
1. Adding a person
   a. **Add** – Click **Add** to add a new person. Enter the name of the person in the pop up window.
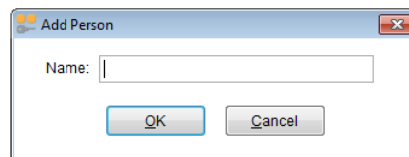
   b. This field can be formatted in any fashion. Choose a format that works best for the application. The most common format is (Last, First). This will make searching and sorting much easier. e.g., Doe, John.
   c. Once a person is added, the **Name** field will be populated with the typed name. Continue configuring the current person or add more people to the list.

2. Importing people
    a. **Import** – Click **Import** to import a list of people and cards. Browse for a .txt or .csv file.
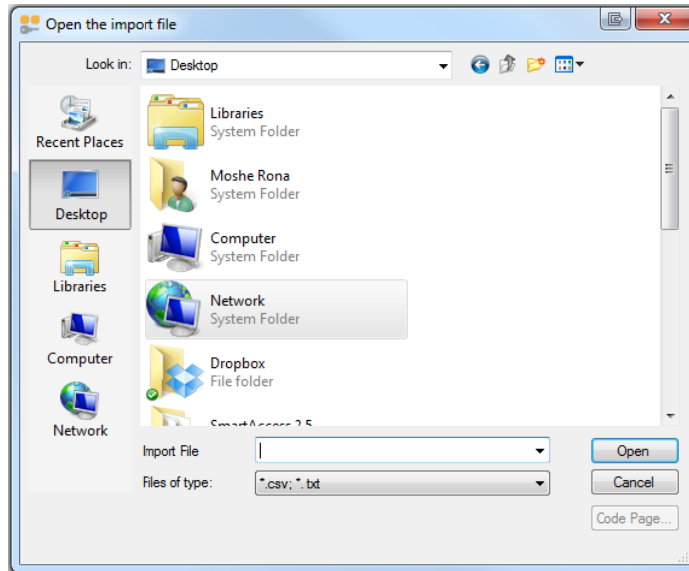
    b. Prior to importing
        i. Locate the file **People Import.xls**. This file is located in the SmartAccess folder.
        ii. Populate the spreadsheet with a list of people and cards to be imported into the system.
        iii. Save the spreadsheet as a .csv file.
            1. **File**>**Save As**> or **F12**
                a. Under the **Save as type**, select **CSV (MS-DOS) (*.csv)**
                b. Click **Save**
        iv. You are now ready to use the import feature to import a list of people and cards.

Note: Importing is most effective when adding a large batch of people and cards at one time. Listing an existing Group in the Group column of the spreadsheet will add the person to the existing Group. Entering a Group which does not exist will create a new Group and add the person to that Group. Importing the same list will duplicate previously imported people. Each batch import should be done with a new XLS spreadsheet.

3. Searching and reporting
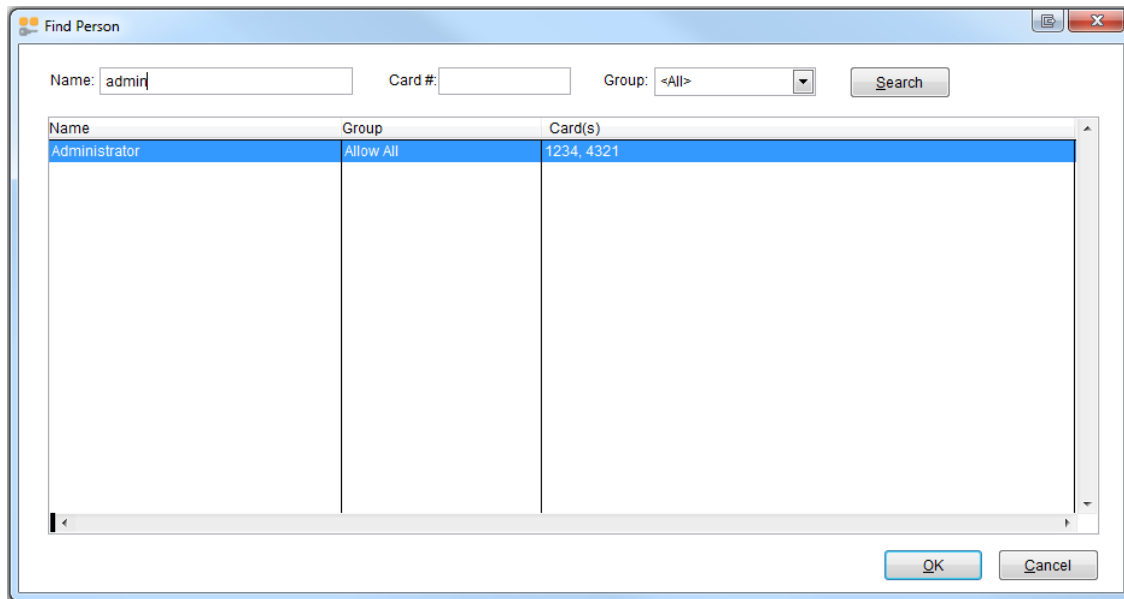
a. **Search** – On the People tab click **Search** in the lower left hand corner to search by name, card #, or group.

b. When searching the **Name** field, all typed characters will be used to search the database with progressive search characteristics.

4. Deleting a person

a. **Delete** – On the People tab select the person you want to delete and click **Delete** located in the lower left hand corner.

b. Once a person is deleted from the system their information will be unrecoverable.

Note: Setting a person to a blank group is an easy way to revoke access without deleting their information from the system. Adding them back into a group will instantly restore access rights.

5. Sorting the people list
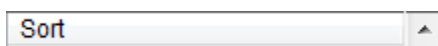
a. **Sort** – On the People tab click the **Sort bar** at the top of the people list to sort the list in **ascending** or **descending** order.

b. Perform a **real time search** by typing in the **search bar**. As you are typing a name the system will progressively search the entire list of people.

6. Adding group access

a. ☐ + ☐ – Click ☐ + ☐ to pop up a drop down. Select a group from the list. Follow these steps again to add additional groups. (Refer to **Groups** tab for creating a group.)
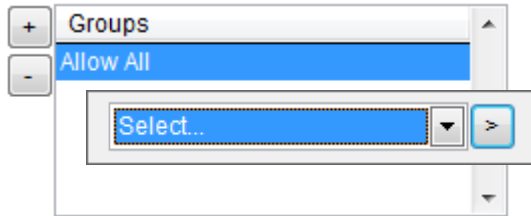
b. Instant group access will be granted to a person when a group is selected from the drop down. Be aware of what group you are adding the person into before selecting it.

Note: Group access is essential to having a clean and efficient access control system. It is highly recommended to create group access rights and put each person into a group.

7. Adding cards
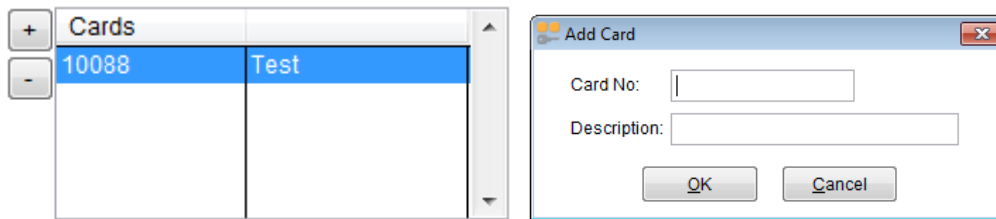
a. ☐ + ☐ – Click ☐ + ☐ to pop up a new window. Enter the card number and description for each card.

b. There is no limit to the amount of cards that can be added to a person.

c. All cards in the same list will have identical access that is applied directly to the person or the group they are in.

Note: When trying to add a card that already exists, the system will notify you that card e.g., **"123 is already in use by Doe, John."**
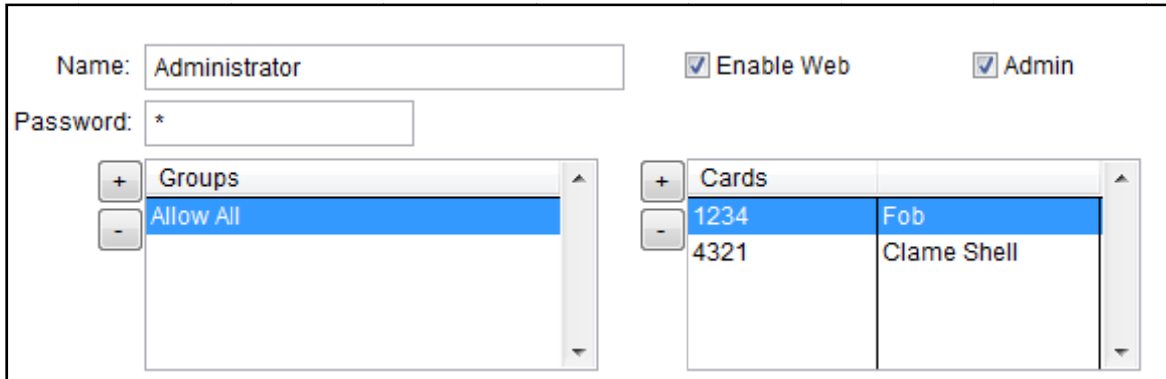
8. Deleting a card
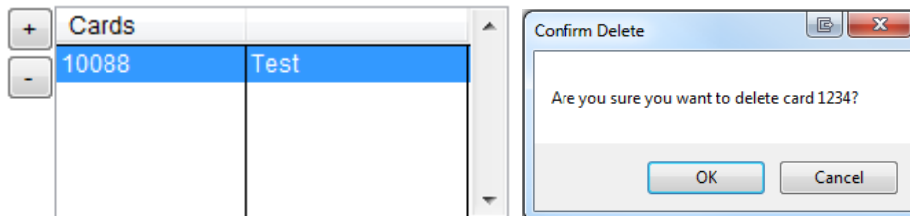
a. ☐ - ☐ – Select the card you want to delete and click ☐ - ☐ located on the left of the card list.

b. The system will require you to verify deleting the card.

9. Adding remote access rights

a. **Enable Web** – On the People tab check **Enable Web** to grant the person remote access for opening any door/relay they currently have access to, from any internet connected device. Each time the person accesses a door/relay remotely the action is logged as a web command by that person.

b. **Admin** – Select **Admin** to give the user remote access to every door/relay in the system, regardless of their personal or group access. This will also allow them to view all reports provided on the remote system.

c. **Password** – Type in the password required to access the remote option on the web page.

d. Accessing the remote options
   i. The system will need to be properly configured to host the web page and allow outside access. Each user will be required to type in their **Name**, exactly as it appears on the screen accompanied by their **Password**.

10. Adding personal rules

a. **Add Rule** – On the People tab click **Add Rule** at the bottom of the screen to add a personal rule to the person's profile you are on.
   i. There are three rule types available (Door, Elevator, or Event).

b. See the **Scheduler** section on how to properly schedule access rights.

11. Viewing personal rules

Rules	Time Range	Day(s) of Week
Turn on lights for 1 On Multiswipe Allow (2 Swipe) Front Door	12:00 AM - 12:00 AM Open/Close 1:00:00 Hall Lights	Su Mo Tu We Th Fr Sa
Allowed Front Door PDK Back Door PDK Conference PDK Production PDK Storage Server Room Suite 105	12:00 AM - 12:00 AM	Su Mo Tu We Th Fr Sa

    a. Personal rules are displayed in the center of the People tab in a grid format showing the type of rules, start/stop time and the days of the week.

    b. Scroll to view rules not displayed on the screen.

    c. Click 🔵 for a color code.

Note: The system automatically groups all devices with identical rules under one rule view. This displays what devices have the same time schedule and allows the user to easily edit that group of devices. The **Allowed** example above shows five doors with 24/7 access.

12. Editing personal rules
    a. **Edit Rule** – Double click individual rules, or select them and click **Edit Rule** to make changes to the rule.

13. Deleting a personal rule
    a. **Delete** – Select the rule you would like to delete and click **Delete** located at the bottom of the People tab under the rules viewing section.

14. Adding a picture to a person's profile
    a. **Change** – Click **Change** to browse for a desired picture.
    b. By default each person will have a blank picture.

15. Deleting a picture
    a. **Delete** – Click **Delete** to delete the existing picture.

Scheduler

The system scheduler is used in the **People** and **Group tab** for scheduling all rules. Any rules applied directly to a person under the **People tab** will only apply to that person and any rules applied to a group under the **Group tab** will apply to all people in that group. One schedule can be applied to multiple doors, elevators, devices, or events at the same time.

1. Select the rule type
   a. Click **Add Rule** at the bottom of the People tab or the Group tab. Select from the drop down list one of the three options available (door, elevator, event).   A pop up window will appear with settings applicable to the rule type you select.

Door

Elevator

Event

b. Set rule time period
   i. **Time: Start/Stop** – Enter the beginning and ending time for the rule to be active.
   ii. Time is written in 24 hour clock format and displayed below in 12 hour format.
   iii. The desired time can be typed in a 12 hour format followed by, **a** or **p**, and will automatically be formatted in 24 hour format. **e.g., 8a or 8p = 08:00 or 20:00**
c. Allow or Deny (*Door rules only*)
   i. **Allow** – Select **Allow** to grant access to the rule during the time frame specified.
   ii. **Deny** – Select **Deny** to revoke access to the rule during the time frame specified.
   iii. A deny rule will always override an allow rule.
   iv. A deny rule cannot be applied to an event or elevator rule only to doors.
d. Recurring days of the week
   i. **Recurring** – Select **Recurring** to add days of the week that will be recurring.
   ii. Individual days, multiple days or **Entire Week** may be selected.
e. Single date rules
   i. **Single Date** – Select **Single Date** to apply a rule to a single day only.

Note: Single dates are useful for temporary access, holidays, etc. Once the date and time has passed the rule will be inactive. These rules can be used again by simply changing the date.

f. Select **Doors** (*Door rules only*)
   i. Select all doors that apply to the rule you created.
g. Select **Floor Groups** (*Elevator rules only*)
   i. Select all floor groups that apply to the rule you created.
h. Configure **Event** (*Event rules only*)
   i. **Name** – Name the event.
   ii. **Reader Port** – Select the reader port that will fire the trigger for the event.
   iii. **Trigger** – Select an appropriate trigger, for the application, that will happen on the door you selected.
      1. Available Triggers
         a. **When Allowed** – Any time there is an ALLOW rule set in the system and a card is scanned for that person or group.
         b. **When Denied (Explicit)** – Any time there is a DENY rule set in the system and a card is scanned for that person or group.
         c. **When Denied (No Rules)** – Any time a card is scanned and denied because there are no access rights set for that person or group.
         d. **Always (Valid Card)** – Any card scanned that is listed in the system for that person or group.
         e. **On Multiswipe Allow (2 Swipe)** – Any time a card is presented two times in 3 seconds for the person or group.
         f. **On Multiswipe Allow (3 Swipe)** – Any time a card is presented three times in 3 seconds for the person or group.
         g. **On Multiswipe Allow (4 Swipe)** – Any time a card is presented four times in 3 seconds for the person or group.

iv. **Action** – Select the action you want to happen after the trigger takes place.
1. Available Actions
   a. **Send Email** – Send an email using the pre-configured email template.
   b. **Do Not Disturb (dnd)** – Toggles the "Do Not Disturb" status of the door/relay. On dnd status the door will be locked and unresponsive to regular access rights until the dnd status is removed.
   c. **Force Toggle** – Toggles the force or hold state of the door/relay that the event is created on to open/close.
   d. **Force Open** – Holds the door/relay that the event is created on in the open position and will not close unless Force Closed.
   e. **Force Close** – Clears the Force Open status.
   f. **Open –** Opens the door/relay.
   g. **Close** – Closes the door/relay.
   h. **Delay Open** – Delays the open on the door/relay.
   i. **Delay Close** – Delays the close on the door/relay.
   j. **Open / Close** – **Opens** the door/relays and sends a close after a delayed time period.
v. **Delay** – Some actions allow you to set a pre or post delay. This option will be available if the action supports it.
i. Saving or canceling the schedule
   i. **Save/Cancel** – Click **Save** to finalize and store your work or **Cancel** to exit the screen and forget all changes.

Group Tab

This tab is used for adding and editing groups. There is no limit to the amount of groups in the system.
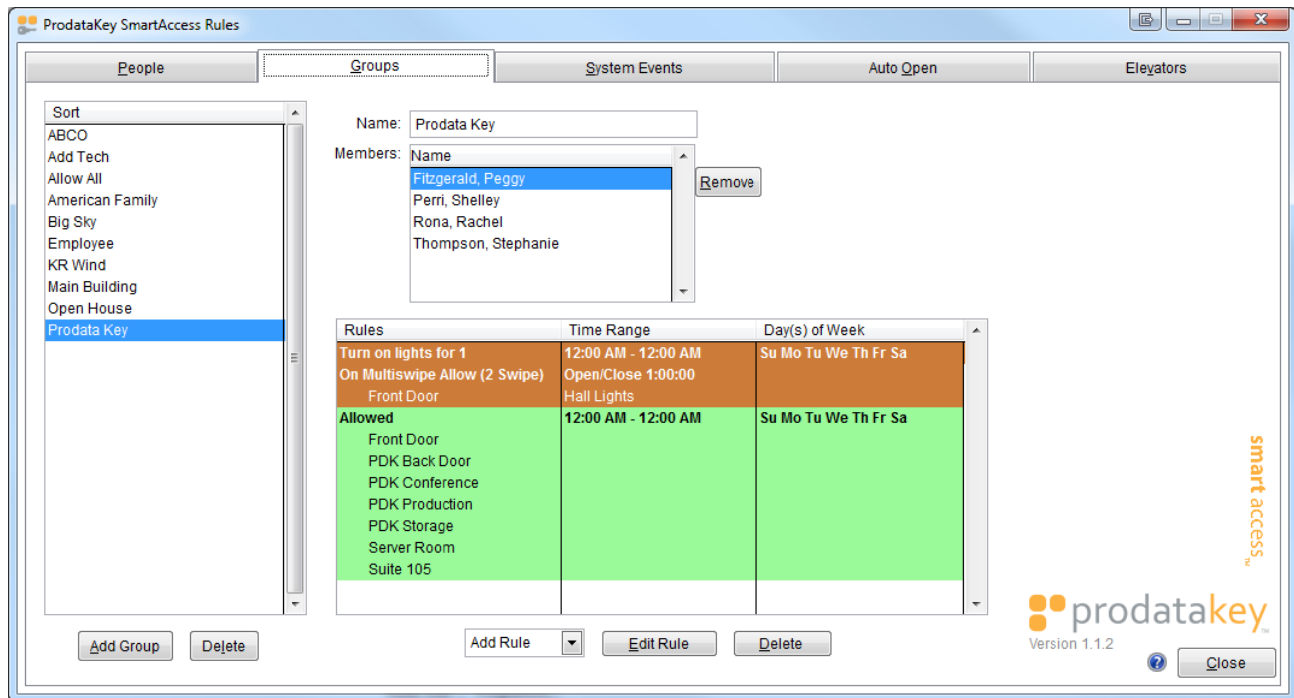
1. Adding a group
    a. **Add Group** – Click **Add Group** to enter the name of the group. This field can be formatted in any fashion. Choose a format and naming scheme that works best for your application.
    b. Once a group is added, the **Name** field will be populated with the name you typed and you can continue configuring the current group or add more groups to the system.

2. Deleting a group
    a. **Delete** – Select the group you wish to delete and click **Delete** located in the lower left hand corner of the Groups tab. Once a group is deleted from the system its information will be unrecoverable.

3. Sorting the group list
    a. **Sort** – Click the **Sort bar** at the top to sort the list in **ascending** or **descending** order.

4. Adding group rules
    a. **Add Rule** – Click **Add Rule** to add a group rule to the group's profile you are on.
    b. See the **Scheduler** section on how to properly schedule access rights.

5. Viewing group membership
    a. **Members** – Displays a list of all people currently associated with the selected group.
        i. Select a person and click **Remove** to remove them from the current group.

6. Viewing group rules

Rules	Time Range	Day(s) of Week
Turn on lights for 1 On Multiswipe Allow (2 Swipe) Front Door	12:00 AM - 12:00 AM Open/Close 1:00:00 Hall Lights	Su Mo Tu We Th Fr Sa
Allowed Front Door PDK Back Door PDK Conference PDK Production PDK Storage Server Room Suite 105	12:00 AM - 12:00 AM	Su Mo Tu We Th Fr Sa

   a. The group rule will be displayed in the center of the Groups tab in a grid format showing the type of rules, start/stop time and the days of the week.
   b. Scroll to view rules not displayed on the screen.

7. Editing group rules
   a. **Edit Rule** – Double click individual rules or select them and click **Edit Rule** to make changes to the rule.

8. Deleting a group rule
   a. **Delete** – Select the rule you would like to delete and click **Delete** located at the bottom of the Groups tab. under the rules viewing section.

   Note: Groups should be created based on specific tasks and working schedules. Common groups are Employee 9-5, Employee Extended Hours, IT, Maintenance, Allow All, After Hours, etc.

   Note: Group access is essential in having a clean and efficient access control system. It is highly recommended to create group access rights and put each person into a group.

System Events Tab

This tab is very unique to our system and will be a powerful tool in configuring a robust and customized access control system. Spend time thinking through and determining the best configurations for your system and make sure rules don't conflict with other rules or access rights. Conflicting rules may add instability to your system.
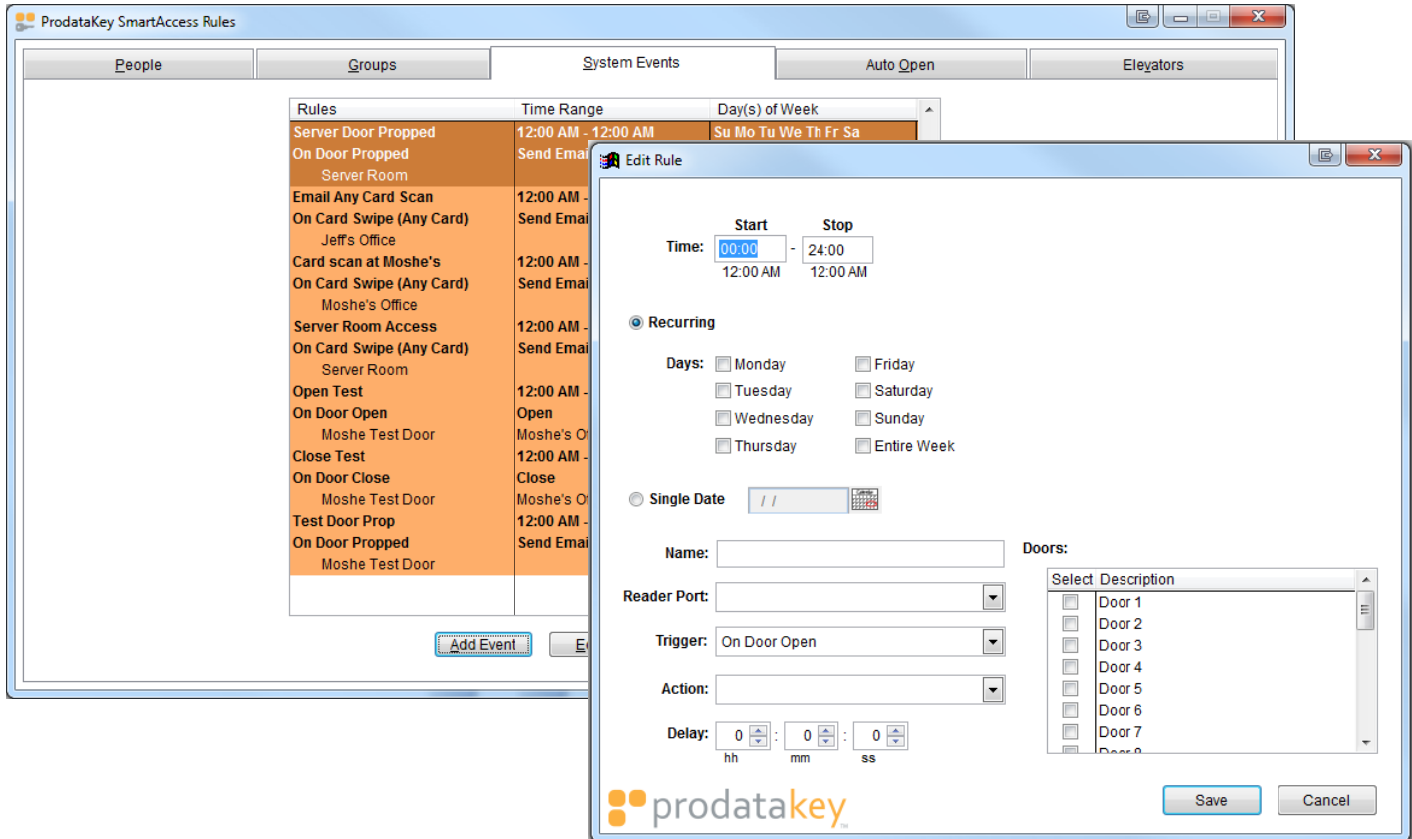
1. Adding an event
   a. **Add Event** – Click **Add Event**. The pop up window will allow you to name and configure the event.
      i. **Name** – Name the event.
      ii. **Reader Port** – Select the reader port that will fire the trigger for the event.
   iii. **Trigger** – Select an appropriate trigger, for the application, that will happen on the door you selected.
         1. Available Triggers
            a. **On Door Open** – Door position of open.
            b. **On Door Closed** – Door position of closed.
            c. **On Door Propped** – Door held open for longer than the prop trigger period.
            d. **On Door Forced** – Door opened without a valid card read or Request to Exit (REX) input.
            e. **On Prop Cleared** – Door position of closed after the prop trigger was activated.
            f. **All Prop Cleared** – All doors with a position of closed after a prop trigger was activated.
            g. **On REX Open** – REX input triggered.
            h. **On REX Close** – REX input closed after trigger.
            i. **On Card Swipe (Any Swipe)** – Any card is swiped at the reader.
            j. **On Card Not Found** – Card swiped at the reader that isn't programmed in the system.

        iv. **Action** – Select the action you want to happen after the trigger takes place.
- 1. Available Actions
  - a. **Do Not Disturb –** Toggles the "Do Not Disturb" status of the door/relay. On dnd status the door will be locked and unresponsive to regular access rights until the dnd status is removed.
  - b. **Force Toggle –** Toggles the force or hold state of the door/relay to open/close.
  - c. **Force Open –** Holds the door/relay in the open position and will not close unless Force Closed.
  - d. **Force Close** –Clears the Force Open status.
  - e. **Open –** Opens the door/relay.
  - f. **Close –** Closes the door/relay.
  - g. **Delay Open –** Delays the open on the door/relay.
  - h. **Delay Close –** Delays the close on the door/relay.
  - i. **Open / Close –** Opens the door/relays and sends a close after a delayed time period.

        v. **Delay** – Some actions allow you to set a pre or post delay. This option will be available if the action supports it.

2. Viewing event rules
   a. The event rule will be displayed in the center of the System Events tab in a grid format showing the type of rule, start/stop time, and the days of the week.
   b. Scroll to view rules not displayed on the screen.

3. Editing event rules
   a. **Edit Rule** – Double click individual rules or select them and click **Edit Rule** to make changes to the rule.

4. Deleting an event rule
   a. **Delete** – Select the event you wish to delete and click **Delete** located at the bottom of the System Events tab. Once an event is deleted from the system its information will not be recoverable.

Auto Open Tab

This tab manages all **Auto Open** schedules. The system can have an unlimited amount of auto open schedules applied to each door/relay.
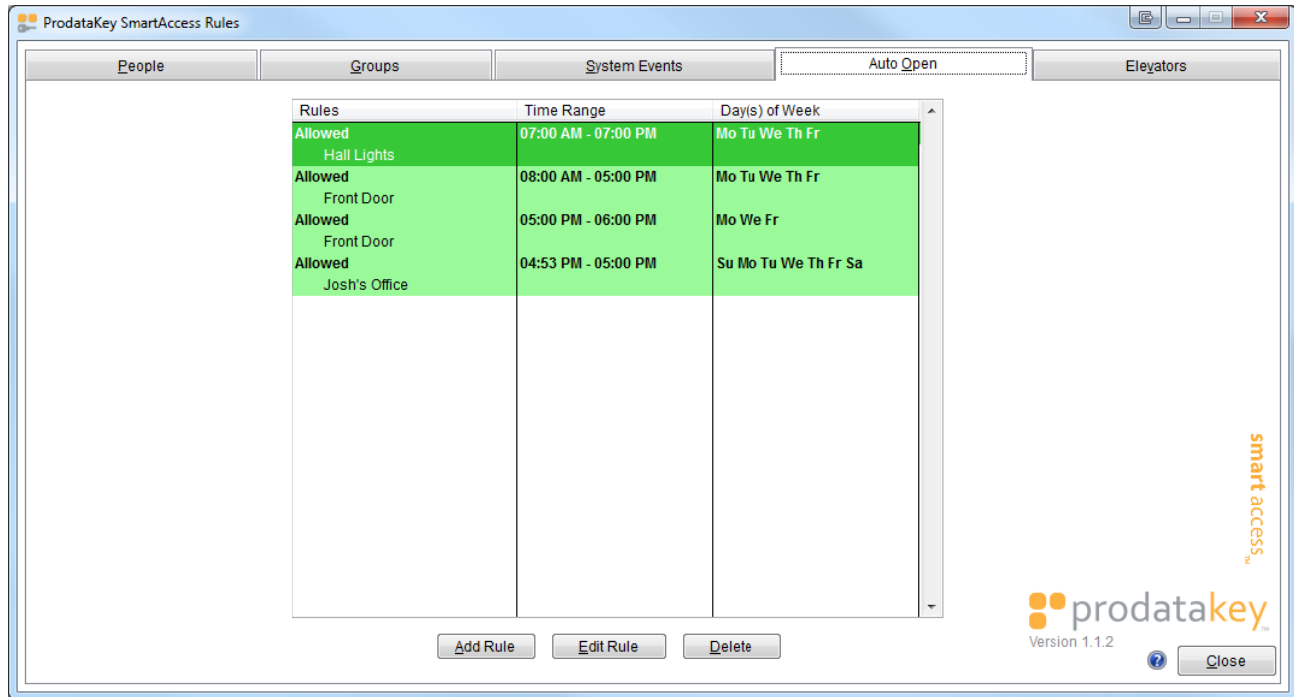

1. Adding auto open rules
   b. **Add Rule** – Click **Add Rule** to add an auto open rule to the system.
   c. See the **Scheduler** section on how to properly schedule access rights.

2. Viewing auto open rules
   a. The auto open rule will be displayed in the center of the Auto Open tab in a grid format showing the type of rules, start/stop time, and the days of the week.
   b. Scroll to view rules not displayed on the screen.

3. Editing auto open rules
   a. **Edit Rule** – Double click individual rules or select them and click **Edit Rule** to make changes to the rule.

4. Deleting an auto open rule
   a. **Delete** – Select the rule you would like to delete and click **Delete** located at the bottom of the Auto Open tab.

Note: The door/relay with a rule applied to it will open at the **Start Time** of the rule and close at the **Stop Time**. Auto open schedules can be applied to a relay on the system controlling doors, elevators, or other devices.

Elevator Tab

This tab is used for creating elevator access groups. Elevator rules are unique in that you can scan at one reader and the system will open multiple relays. This section is typically used for elevators but can be used for special door access or other devices.
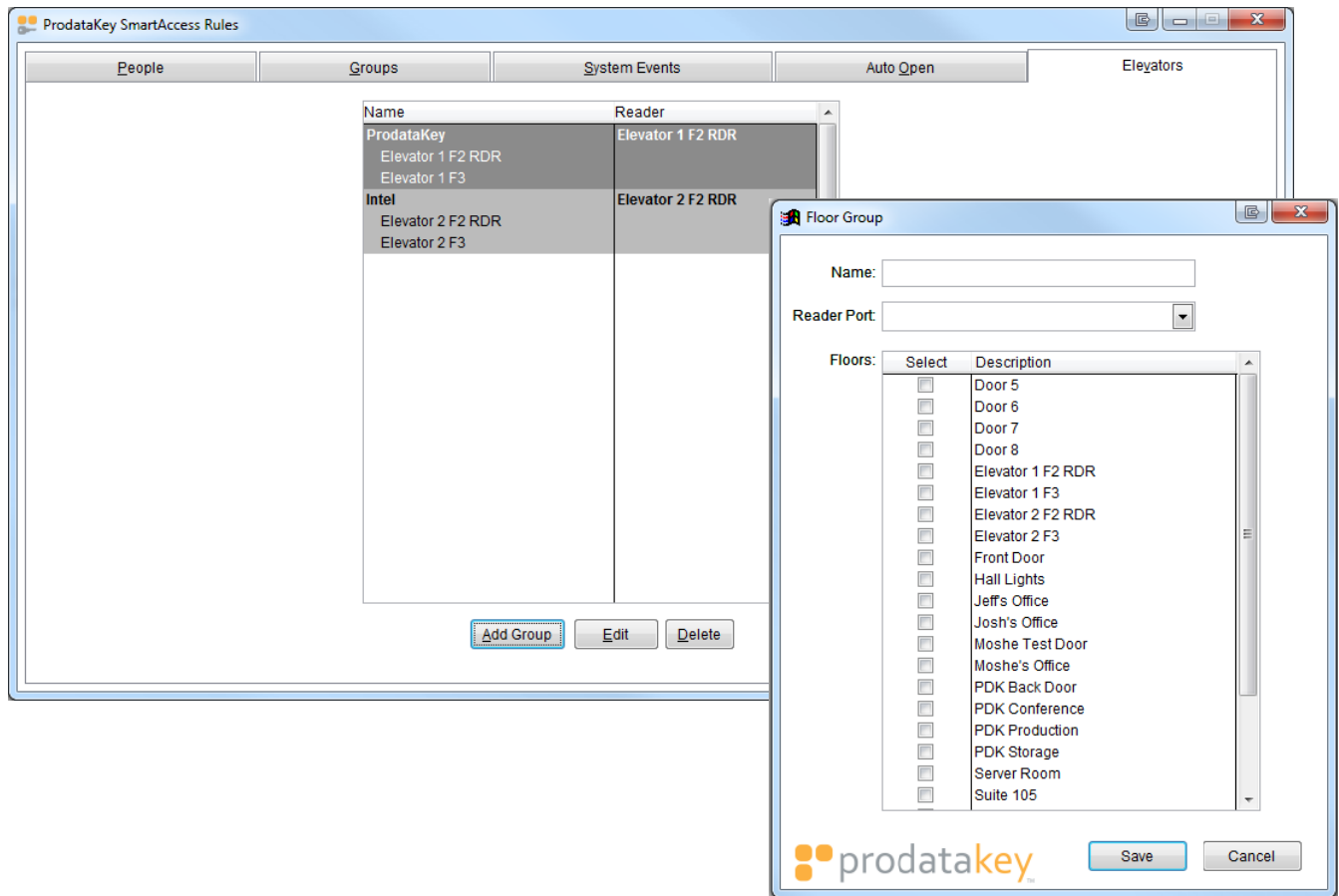

1. Adding elevator floor groups
    a. **Add Group** – Click **Add Group**. The pop up window will all you to configure your elevator floor group.
    b. Select all elevator floors/relays that will be a part of the group.

2. Viewing elevator floor group rules
    a. The group rule will be displayed in the center of the Elevators tab in a grid format showing the type of rules, start/stop time, and the days of the week.
    b. Scroll to view rules not displayed on the screen.

3. Editing elevator floor group rules
    a. **Edit** – Double click individual rules or select them and click **Edit Rule** to make changes to the rule.

4. Deleting an elevator floor group
    a. **Delete** – Select the elevator floor group you wish to delete and click **Delete** located at the bottom of the Elevators tab. Once an elevator group is deleted from the system its information will not be recoverable.

Note: Once an elevator group has been created, it will need to be scheduled in the system under a person or group.

Reports and Mobile

These instructions will walk you through how to set up remote access for pulling reports and opening doors through the LAN or WAN.
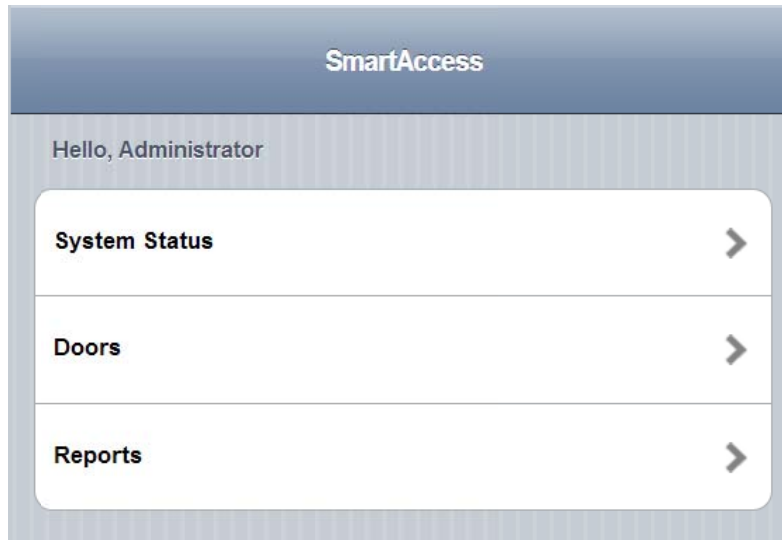
1. Locate the user requiring remote access in the **SmartAccess Rules** section of the software. Check **Enable Web** and **Admin**.
   a. Type in a password for **Password**

2. Type in the IP address of the ProdataKey Access Panel **/sa.htm**
   a. ie http://10.60.1.196/sa.htm
   b. If from an external network type in the external IP address of the system running the access control server with a port of **80**.
      i. Make sure port **80** is forwarded to the computer's internal IP address
      ii. ie http://66.60.115.175:80/sa.htm

3. Type in the exact user name used in **SmartAccess Rules** and the password used for **Password.** The username and password are case sensitive.

4. You can now open, close and run reports for each door you have access to.

5. This same application can be used from a computers web browser to run more advanced reports. Run reports by person, door and access rights. Chrome, Fire Fox or Safari web browsers are recommended.