

# Access Manager Suite User Manual

Access Manager

Access Application

Control Panel

About

HOME

## Welcome to ACTatek ACCESS MANAGER Suite

To learn more about ACTatek visit [www.actatek.com](http://www.actatek.com).

You can also find [documentation on ACTatek products](#).



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# **ACTatek Access Manager Suite User Manual**

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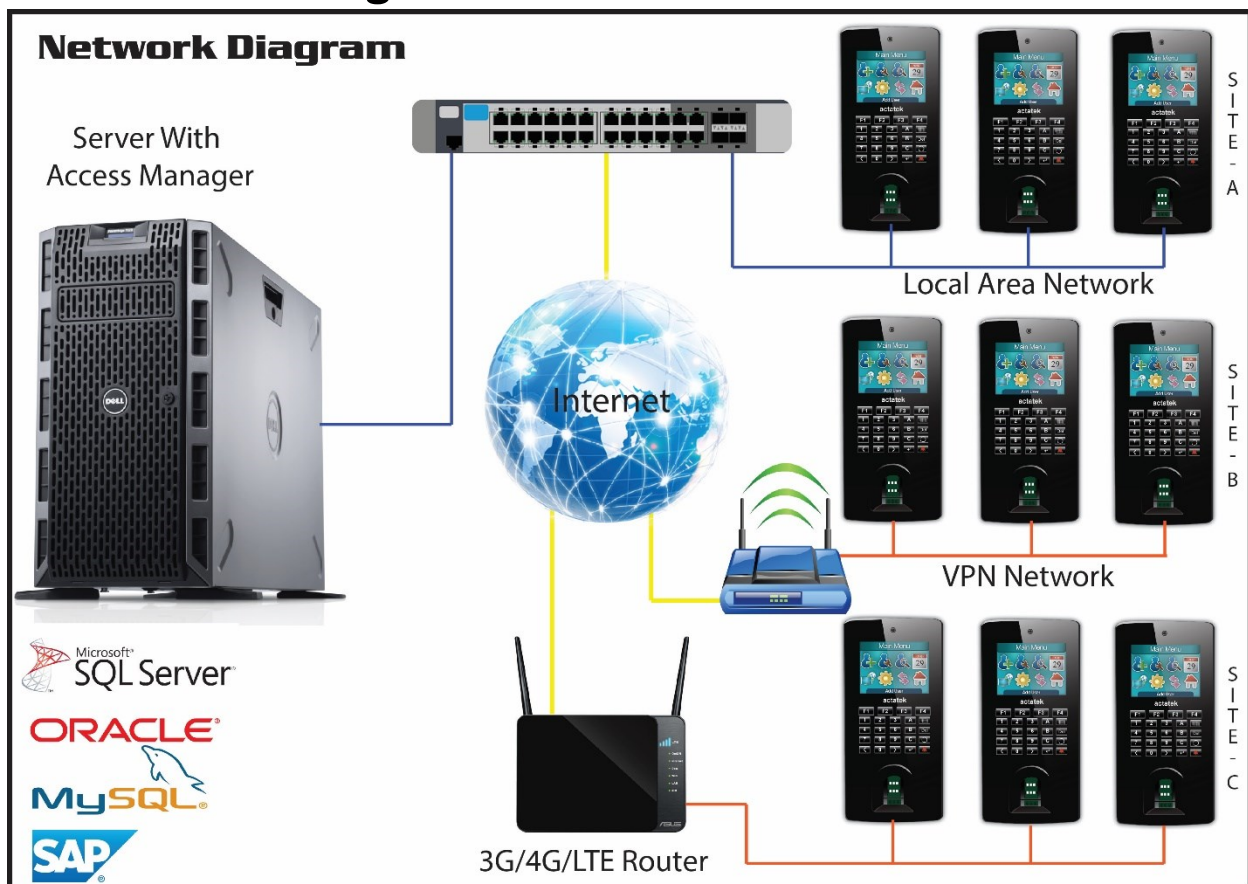
# Chapter 1: Overview

## 1.1 Introduction

Access Manager Suite (AMS) provides centralized web-based control and management to multiple ACTatek terminal environment setups. It also comes packed with features without any limitation in its software so that the system administrator can have full control of the ACTatek system at all times, either on site or remotely. In addition, the AMS software gathers event log data from all ACTatek terminals into a centralized database to simplify user redundant tasks. To enhance user management, AMS will facilitate all data synchronization of ACTatek terminals from user modifications to newly added users. Adding or editing users in the AMS control center becomes an easy process along with managing access groups and rights, departments, open door schedules, and reports.

The AMS software is designed to be robust and versatile so that ACTatek terminals on different networks, either public or private, can connect and communicate in a global scale.

## 1.2 Network Diagram



## 1.3 System Requirements

Hardware Requirements	
CPU Processor	Dual Core 2.0 GHz or faster (32-bit/64-bit)
Memory	4.0 GB or higher
Hard Disk Space	20.0 GB or higher
Network Controller	100 Mbps or higher

Software Requirements	
Operating System	Windows 7 Professional (32-bit/64-bit) or above Windows 8 Professional (32-bit/64-bit) or above Windows Server 2008 R2 SP1 (64-bit) or above Windows Server 2012 (64-bit) or above
Database Server Software Support	Microsoft SQL Server 2008 Microsoft SQL Server 2012 Microsoft SQL Server 2014 Microsoft SQL Server 2016 MySQL Oracle SAP Database
Microsoft .Net Framework	2.0, 3.5.1, & 4.0
Supported Web Browser	Internet Explorer 7.0 or higher Firefox 3.5 or higher Chrome 6.0 or higher Safari 5.0 or higher

## 1.4 Microsoft .Net Framework Requirements

AMS Version:	.Net Version Requirement:
1.2.3.40 to 1.2.3.x (Latest)	.Net 4.0
1.0.1.28 to 1.0.1.33	.Net 2.0/3.5.1

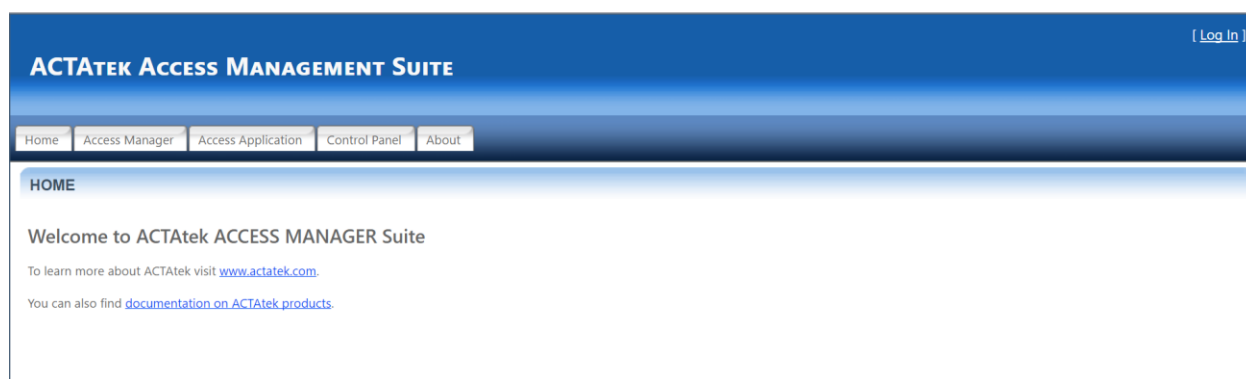
To download Microsoft .Net Framework, follow the link below:  
<http://www.microsoft.com/net/downloads>

## Chapter 2: Configuring Access Manager Suite

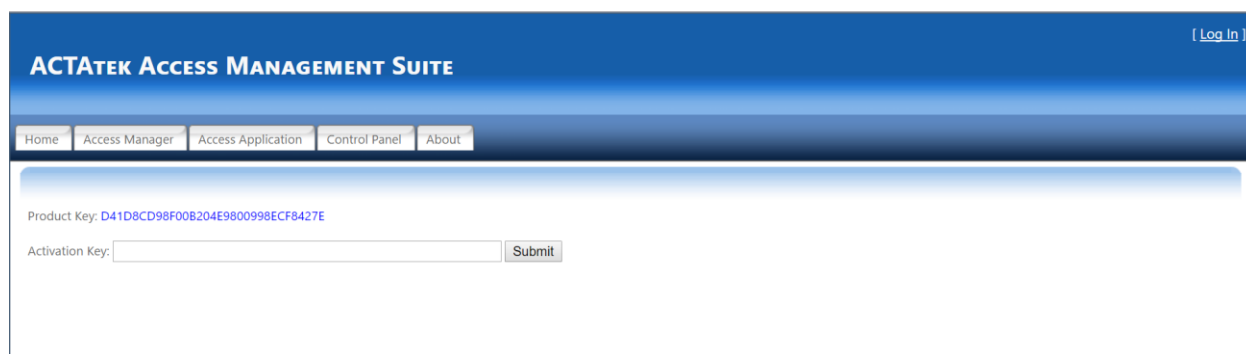
### 2.1 Accessing AMS

Method	URL
Local computer access to AMS	http://localhost/AccessManager/
Network access to AMS	http:// <b>IP ADDRESS OF SERVER</b> /AccessManager/
Network access to AMS with customized port	http:// <b>IP ADDRESS OF SERVER:PORT NUMBER</b> /AccessManager/

Enter the URL applicable to the method of accessing AMS to the address bar of a web browser.



### 2.2 Activate AMS



Press **Log In** at the top right to obtain this page. Contact ACTatek support staff and provide the **Product Key** to them and in return, you should receive an **Activation Key** back.

## 2.3 Log into AMS

Administrator Default Login Details	
Username	Admin
Password	1

ACTATEK ACCESS MANAGEMENT SUITE [\[ Log In \]](#)

Home Access Manager Access Application Control Panel About

**LOG IN**

Please enter your username and password.

Account Information

Username:

Password:

☐ Keep me logged in

**Log In**

## 2.4 Setup Database In AMS

### 2.4.1 Setup SQL Database

ACTATEK ACCESS MANAGEMENT SUITE Welcome Admin! [\[ Log Out \]](#)

Home Access Manager Access Application Control Panel About

**CONTROL PANEL**

System Account ☒

System Configuration ☒

Database Configuration

System Configuration

Server Setup

Edit/Delete Server

System Utility ☒

Audit Log

**CONTROL PANEL**

**System Account**

Register Change password Assign Permission

**System Configuration**

Configure Database Configure System Setup Server Edit Server

Once you've logged in as an administrator, go to **Control Panel** and then **Database Configuration**.

**ACTATEK ACCESS MANAGEMENT SUITE**

Home | Access Manager | Access Application | **Control Panel** | About

**CONTROL PANEL**

- System Account
- System Configuration
- Database Configuration
- System Configuration
- Server Setup
- Edit/Delete Server
- System Utility
- Audit Log

**DATABASE CONFIGURATION**

**Access Manager Database**

Database Type:

Database Server Address:  Port:

Database Server Instance:

\*Default port will be used if left blank

Database Name:

User Name:

User Password:

Choose the correct **Database Type**. Enter in the **Database Server Address** which includes either the IP address of the database server followed by the instance or localhost followed by the instance. For the **Database Name**, ensure that you have entered a database name that does not exist in your database server so that it creates a new AMS database. Supply the appropriate **User Name** and **Password** with rights to create the database in your database server. Press Setup to proceed and the successful output can be seen below.

**ACTATEK ACCESS MANAGEMENT SUITE** Welcome Admin ! | [Log Out](#)

Home | Access Manager | Access Application | **Control Panel** | About

**CONTROL PANEL**

- System Account
- System Configuration
- Database Configuration
- System Configuration
- Server Setup
- Edit/Delete Server
- System Utility
- Audit Log

**DATABASE CONFIGURATION**

**Access Manager Database**

Database Type:

Database Server Address:  Port:

Database Server Instance:

**DATABASE SETUP SUMMARY**

- Checking existence of database: [AMS1246]
- Using database server: localhost\SQLEXPRESS
- Database exists

## 2.4.2 Setup Oracle Database

For AMS ver.1.2.4.2 or above version

Welcome **admin** ! [ [Log Out](#) ]

### ACTATEK ACCESS MANAGEMENT SUITE

Home | Access Manager | Access Apps | Control Panel | About

#### CONTROL PANEL

- System Accounts**
  - Register/Edit/Delete Account
  - Change Password
  - Assign Permission
- System Configuration**
  - Database Configuration
  - System Configuration
  - Server Setup
  - Edit/Delete Server
- System Utils**
  - Audit Log

#### DATABASE CONFIGURATION

! - There is no terminal settings for curret server[192.168.63.2], please go to [System Configuration - Server Setup] to setup

##### Access Manager Database

Database Type: **Oracle**

Database Server Address: **192.168.63.2** Port: **1521**

\*If left blank default port will be used

Database Name: **orcl**

User Name: **ACTATEK**

User Password: **\*\*\*\*\***

##### DATABASE SETUP SUMMARY

- Checking existence of database: []
- Database exists
- Oracle table schema does not exist
- Creating Oracle table schema
- **Oracle table schema created successfully**

**Setup**

For old AMS ver. 1.0.1.33

Home | Access Manager | Control Panel | About

#### CONTROL PANEL

- System Accounts**
  - Register/Edit/Delete Account
  - Change Password
  - Assign Permission
- System Configuration**
  - Database Configuration
  - System Configuration
  - Server Setup
  - Edit/Delete Server
- System Utils**
  - Audit Log

#### DATABASE CONFIGURATION

! There is no terminal settings for curret server[192.168.10.18], please go to [System Configuration - Server Setup] to setup

##### Access Manager Database

Database Type: **Oracle**

Database Server Address: **192.168.0.131** Port: **1521**

Database Name: **orcl**

User Name: **SYSTEM**

User Password: **\*\*\*\*\***

##### DATABASE SETUP SUMMARY

- Checking existence of database: orcl
- Database exists
- **Oracle database and table schema exists**

**Setup**

1. Under Database Type select “Oracle”
2. Type the Database Server Address. E.g. localhost or IP address \* If you are connecting to other server via Intranet. Make sure to include the port number after the IP address separated by colon “:”
3. Key in the Database Name based on your preference.
4. Key-in the user name “system” (default user which can create, edit and delete on the database)
5. Enter the password.
6. Click Setup then the page will appear same as shown on Figure 2.0 as a successful connection.

## 2.5 Server Setup In AMS

Next step is to go to **Control Panel** and then **Server Setup**. Enter a desired **Terminal Group** name and ensure the **Server IP Address** corresponds to the detected Server IP. Now provide the time zone information in accordance with your region. A public SNTP server is **pool.ntp.org**. Now provide a **Magic String** of your choice which will be used as the encryption and decryption key while transporting event logs over the network. Press the **Setup** button to save changes. A successful message will appear like in the below image.

## 2.6 Add New AMS Login Accounts

To add new AMS login accounts, go into **Control Panel** and then **Register/Edit/Delete Account** under **System Accounts**.

ACTATEK ACCESS MANAGEMENT SUITE

Welcome Admin ! [ Log Out ]

Home Access Manager Access Application Control Panel About

**CONTROL PANEL**

**System Account**

- Register/Edit/Delete Account
- Change Password
- Assign Permission

**System Configuration**

- Database Configuration
- System Configuration
- Server Setup
- Edit/Delete Server

**REGISTER / EDIT / DELETE ACCOUNT**

Account Information

Login ID: HR Name: Human Resource Password: \*\*\* Department: All Departments

☒ Administrator ☒ Active

Register

Login ID	Name	Password	Department	Administrator	Active	Action
Admin	Administrators	***	All Departments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Edit</a>

Provide a new **Login ID**, **Name**, and **Password**. Check the boxes for **Admin** and **Activate** and press the **Register** button to add the new administrator account.

## 2.7 Assign Permission To AMS Login Accounts

Go into **Control Panel** and then **Assign Permission** under **System Accounts**. Press the **Select** clickable link to change permissions for the corresponding user. Now check and uncheck areas in Access Manager you wish to restrict or grant access for this particular user. Press the **Apply** button to save the changes.

ACTATEK ACCESS MANAGEMENT SUITE

Welcome Admin ! [ Log Out ]

Home Access Manager Access Application Control Panel About

**CONTROL PANEL**

**System Account**

- Register/Edit/Delete Account
- Change Password
- Assign Permission

**System Configuration**

- Database Configuration
- System Configuration
- Server Setup
- Edit/Delete Server

**System Utility**

- Audit Log

**ASSIGN PERMISSION**

Login ID	Name	Administrator	Active	Select
Admin	Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Select</a>
HR	Human Resource	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Select</a>

Permission details for [HR]

**Access Manager** **Control Panel**

Permission Name	Allow
<b>User Admin</b>	
Add User	<input checked="" type="checkbox"/>
View/Edit User	<input checked="" type="checkbox"/>
Add/Remove User To Terminal (Suite Only)	<input checked="" type="checkbox"/>
Bulk Changes On Users (Suite Only)	<input checked="" type="checkbox"/>
<b>Departments</b>	
Add/Edit/Delete Department	<input checked="" type="checkbox"/>
<b>Groups &amp; Access Rights</b>	
Add/Edit/Delete Access Group	<input checked="" type="checkbox"/>
Add Access Right	<input checked="" type="checkbox"/>
View/Edit Access Right	<input checked="" type="checkbox"/>
<b>Trainers &amp; Holidays</b>	



## **Chapter 3: Configuring ACTatek Terminals**

### **3.1 Accessing the ACTatek Web Interface**

Super Administrator Default Login Details	
Username	A999
Password	1

By entering the IP address of the ACTatek in a web browser of a computer that is connected to the same network as the ACTatek, you will be able to bring up the web interface as shown above. Now you will be able to login to the ACTatek over the network for configuration.

\*It is important to use capitalized letters in the Login ID field.

### **3.2 View Device Information**

To obtain the ACTatek's device information such as the current IP address, serial number, connectivity status, and more; press the enter key 6 times on the key pad.

Follow this sequential pattern:       on the key pad.

## 3.3 Enable Access Manager Mode

Once you have logged in as super administrator through the web interface of the ACTatek terminal, click on **Terminal Setup** in the **Terminal Settings** menu. Scroll down on the page and locate the **Miscellaneous** heading. In **Terminal Mode** setting, switch over from **Standalone** to **Access Manager** and press the **Submit** button at the bottom of the page to save the changes.

The screenshot shows the 'ACTatek Web Interface > Terminal Setup' page. On the left sidebar, 'Terminal Setup' is highlighted under 'Terminal Settings'. The main content area shows the 'Miscellaneous' section. The 'Terminal Mode' is set to 'Access Manager' (radio button selected). Other settings include 'Job Code' set to 'Disable', 'Door Strike 1 Option' set to 'Access Granted', and 'Relay Delay' set to '8 sec (1-20)'.

## 3.4 Register ACTatek to AMS

After **Access Manager** terminal mode is set, proceed by clicking on **Access Client Setup** in the **Terminal Settings** menu. Provide an **Endpoint URL** that point to the Access Manager Suite Server via an IP address followed by the port and the location. Press the **Set** button to test the Endpoint URL.

**Endpoint URL:** [http:// IP ADDRESS OF AMS:80/AccessServer/AccessService.asmx](http://IP ADDRESS OF AMS:80/AccessServer/AccessService.asmx)

**Example:** [http:// 192.168.0.14:80/AccessServer/AccessService.asmx](http://192.168.0.14:80/AccessServer/AccessService.asmx)

The screenshot shows the 'ACTatek Web Interface > Access Client Setup' page. The main content area shows the 'ACCESS Client Setup' section. The 'Connection Type' is set to 'Lan'. The 'Access Client' status is 'Unregistered'. The 'Server Status' is 'Offline or unreachable...'. The 'Endpoint URL' is set to 'http://192.168.0.14:80/AccessServer/AccessService.asmx'. The 'Interval(Seconds)' is set to '10'. A 'Set' button is visible at the bottom.

If the **Register** button appears, that means the ACTatek terminal was able to connect to the Endpoint URL that was provided.

ACTatek Web Interface > Access Client Setup

**Terminal**

- Log Off
- Terminal Status

**User Administration**

- Attendance Report
- Daily Report
- View Event Log
- Add Event Log
- View User List
- Add New User
- Departments
- User Messages

**Access Control**

- Access Groups

## ACCESS Client Setup

Connection Type:

Access Client

Device Status: Unregistered

Server Status: Online

Endpoint URL:

Interval(Seconds):

### Troubleshooting:

If you are not able to get to the screen with the **Register** button and **Server Status** reports offline, check:

- 1) Endpoint URL for typing mistakes.
- 2) The IP address of the AMS server is correct.
- 3) The firewall settings on the AMS server are set correctly such that port 80 is open.

Press the **Register** button to register this ACTatek terminal to Access Manager.

ACTatek Web Interface > Access Client Setup > Registering

starting slave device registration...

Progress

The ACTatek terminal that is the first to register to AMS with a clean database will push all its user data from the ACTatek terminal into the AMS database. All following ACTatek terminals that will be registering to AMS will have its user data replaced by the downloaded copy from the AMS database during registration.

When the ACTatek terminal has finished the registration process, a successfully message as indicated below would appear.

**ACTatek Web Interface > Access Client Setup > Registered Successfully**

**Terminal**

- Log Off
- Terminal Status

**User Administration**

- Attendance Report
- Daily Report
- View Event Log
- Add Event Log
- View User List
- Add New User
- Departments

**Access Control**

- Access Groups
- Triggers

## ACCESS Client Setup

[slave device registration succeeded...]

Connection Type: Lan

Access Client

Device Status: **Registered**

Server Status: **Online**

Endpoint URL: http://192.168.0.14:80/AccessServer/AccessService.asmx

Interval(Seconds): 10

Set Unregister

To verify that the ACTatek terminal is now registered and connected successfully with AMS, you can login to the AMS web interface and press **Terminal List** in the menu. It should now list this registered ACTatek terminal in the terminal list found in AMS.

**ACCESS MANAGER**

- Site
  - Add/Edit/Delete Site
- Location
  - Add/Edit/Delete Location
- User
  - Add User
  - View/Edit User
  - Bulk Edit User
- Department
  - Add/Edit/Delete Department
- Access Group and Access Right
  - Add/Edit/Delete Access Group
  - Add Access Right
  - View/Edit Access Right
- Trigger and Holiday
  - Edit Trigger
  - Configure Trigger Schedule
  - Configure Holiday

### TERMINAL LIST

System Information

Number of registered terminals: 2 Refresh

Export

File Format: TXT Export

Search Option

Department: <-- All --> Department Name: Department Description: Search

Terminal List Page Size

Page Size: 5

Serial Number	Name	Model	URL Link	Firmware Version	Registered User	Last Update	ID	Action	Pending Request
00111DA04B26	ACTatek Test Unit-1	ACTA3-5K-FU-SM-C	<a href="#">192.168.8.102</a>	actatek_3_06.1412	4/5000	1/1/2000 12:00:00 AM	Online	<a href="#">Details</a>	
00111DB0080D	ACTatek Test Unit-2	ACTA3-5K-FU-SM	<a href="#">192.168.8.103</a>	actatek_3_06.1412	4/5000	5/28/2017 10:14:09 PM	Offline	<a href="#">Details</a>	

## 3.5 Assigning Time Zones to ACTatek

This feature is available in AMS 1.2.3.71 or newer. For AMS deployment with ACTateks located in different time zones, it is important to assign the correct time zone for each ACTatek to ensure event log data can be collected and displayed at the correct times.

To assign a time zone to an ACTatek, navigate to **Terminals** and then **View Terminal Lists**. Under the **Action** column, press **Details** which corresponds to that specific ACTatek. In the **Terminal Time Zone Setting**, select from the dropdown menu of time zones and press the **Update** button to save changes.

**Access Manager > View Terminal List**

Terminals in system: 1

	Name	Model	URL Link	Firmware Ver.	Reg.User	Last Update	Action	Sync
4EC0	ACTatek	ACTA3-20K-FLI-SM-C	<a href="#">10.0.0.33</a>	actatek_3_06.1306	55/20000	5/28/2014 11:26:22 AM	<a href="#">Details</a>	

**Access Manager > View Terminal List > Details > Select Time Zone**

Trigger S  
Holiday S  
or & Bell  
Door Ope  
Bell Sched  
ent Logs

(GMT -06:00:00) Central America  
(GMT -05:00:00) Eastern Standard Time (US & Canada)  
(GMT -05:00:00) Eastern Standard Time,Indiana (East))  
(GMT -05:00:00) Bogota,Lima, Quito  
(GMT -04:00:00) Atlantic Standard Time (Canada)  
(GMT -04:30:00) Caracas,La Pa  
(GMT -04:00:00) Santiago  
(GMT -08:00:00) Pacific Time (US & Canada)

## Chapter 4: Access Manager Suite Functionalities

### 4.1 Auto User Synchronization

By default, auto user synchronization is set on enabled. All user changes made on the ACTatek terminals or in Access Manager will propagate updates to all connected ACTatek terminals to ensure a synchronized state. If you are not sure, leave **Auto User Synchronization** on enabled for the best performance. This feature can be disabled by going into **Control Panel** and then **System Configuration** and selecting **Disabled**. By pressing the **Update** button, the changes will then be saved.

Control Panel > System Configuration > Auto User Synchronization Settings

**Access Manager Server Setting**

Auto User Synchronization

Disabled ▼

Update

### 4.2 Add Users

To add a new user, go into **Access Manager** tab, then **User Admin** and **Add Users**. The **User ID** and **Password** fields must only contain any of these characters found in "0123456789ABC". The **User ID** must also have a length of 3 or more characters long. For fingerprint and smart card enrollments, this will have to be accomplished on any of the registered ACTatek terminals by providing the associated **User ID** to the fingerprint or smart card enrollment process.

Access Manager > User Admin > Add Users

General Info | Department & Group | User Info | User IN/OUT Status

User ID: 123456

Password: •••••

SmartCard:

First Name: John

Other Name: Type Other Name Here

Last Name: Smith

Admin Level: User ▼

FP Security Level: Normal ▼

Last Name: ☐ FLI ☐ FAM

In the status field, ensure **Active** is checked to enable this new user in the system. You may also wish to check **Password** if this user can enter through PIN method otherwise leave it unchecked if you do not wish to let this user authenticate through PIN method.

Additional settings which you may choose to set for any new user are: department & groups, user information, user expiry date, and user messages. All these user settings can be modified in **View/Edit User** if you choose not to set any now.

## 4.3 View/Edit User

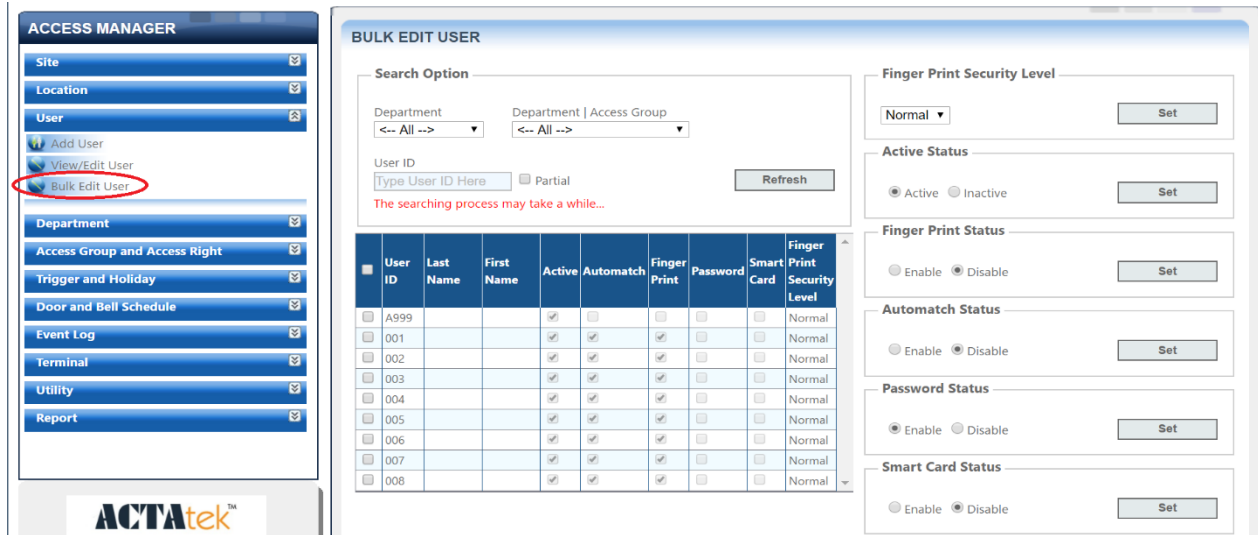
This feature allows you to make any changes **except User ID** to an existing user in the system. You can choose to edit, view, or delete an existing user over Access Manager. To delete multiple users, check the boxes that are associated to the users that you would like to delete and press the **Remove** button.

To narrow down a specific user, the search options allows you to search by User ID, First Name, Last Name, Department, and or Group. To view the search result, press the **Search** button.

Access Manager > User Admin > View/Edit User											
<input type="checkbox"/>	ID	User ID	Last Name	First Name	Active	A/M	FP	Pwd	SC	A/M Group	Action
<input type="checkbox"/>	1990	B13040	Actatek	James	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	<a href="#">Edit</a> <a href="#">Delete</a>
<input type="checkbox"/>	1991	B13041	Actatek	John	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	<a href="#">Edit</a> <a href="#">Delete</a>
<input type="checkbox"/>	1992	B13042	Actatek	Mike	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	<a href="#">Edit</a> <a href="#">Delete</a>
<input type="checkbox"/>	1993	B13043	Actatek	Smith	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	<a href="#">Edit</a> <a href="#">Delete</a>
											<input type="button" value="Remove"/>

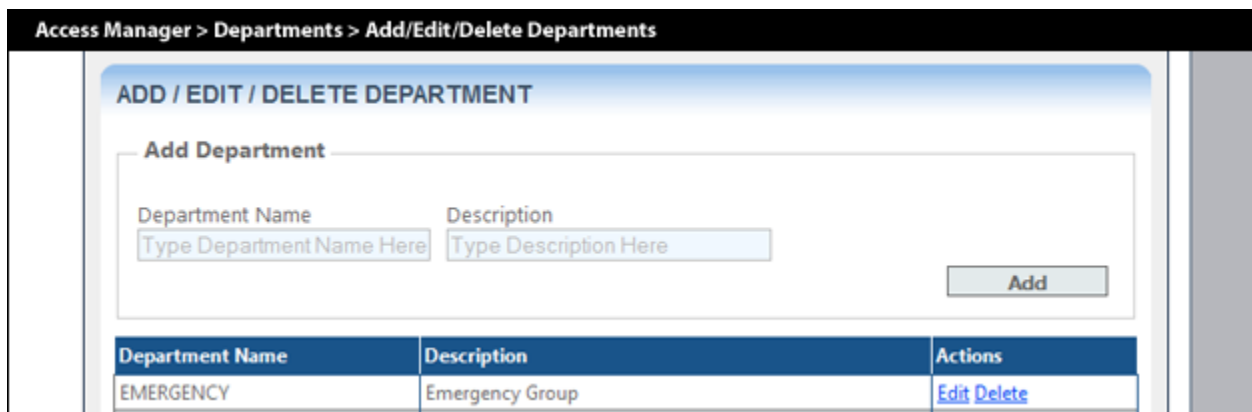
## 4.4 Bulk Edit Users

Bulk edit users allow the administrator to make changes to multiple users in Access Manager at the same time. Press the **Refresh** button to reveal a list of users in Access Manager and check the boxes associated to the users that you want to make changes to. Changes include enabling or disabling user settings for: user active status, fingerprint, automatch, password, and smart card. Additionally, adjustable user settings apply to fingerprint quality, departments, and groups. For each change, press the **Set** button to save the changes to the queue. When all the changes are made, press the **Commit** button to permanently make the changes to the selected users. The registered ACTatek terminals will now enter **System Maintenance Mode** while these changes are being made.



## 4.5 Add/Edit/Delete Departments

Departments are used for associating users into main groups. This feature allows the administrator to add, edit, or delete departments in Access Manager. Departments also help categorize users and will be the foundation for setting up **Access Groups** and **Access Rights**. To associate users to departments, you will edit a selected user in **View/Edit User** and in the **Department** tab, check the listed departments relevant to this user and press the **Update** button to save the changes.



## 4.6 Add/Edit/Delete Access Group

The default settings of Access Manager already have predefined access groups. The administrator may choose to customize or remove irrelevant access groups and departments to personalize their setup and environment. Setting up an access group is the next step in creating an access right. Access groups are used to distinguish different levels of access in a department.



## 4.7 Add Access Right

An access right is an access control policy used for binding an ACTatek terminal to an access schedule with the associated department and access group. This will enforce users in that associated department and access group to the access schedule as defined by the administrator. The advantage of using access rights is that it will provide the access control rules to ACTatek terminals. For example, using access rights can limit certain user groups to certain ACTatek terminals. Additionally, it can restrict the time and days when a user can have access.

Access Manager > Groups & Access Rights > Add Access Right

### ADD ACCESS RIGHT

**Access Right Information**

Access Right Name:

Dept/Group Name:

Terminal Name / SN:

Quick Access: ☒ Enable ☐ Disable

To setup an access right, provide an **Access Right Name** followed by selecting a **Dept/Group Name** from the list which this access right will affect. Users in this department and access group will have this policy applied to them. Next, select an ACTatek terminal from the **Terminal Name / SN** list to apply this access right to and set **Quick Access** to enable.

In the **Day & Time** field, the administrator defines the restrictions and the rules in terms of a schedule. By default, the schedule has all time and days of the week disabled which can be referenced below by the light grey dots.

Access Manager > Groups & Access Rights > Add Access Right > Schedule

### Access Right Time Schedule

Existing Access Right Schedule:

Day	00	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23
Sun	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Mon	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Tue	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Wed	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•

After making setting changes to the **Day & Time** field, press the **Modify Time** button to review the changes made. The filled black dots are set for enabled while the light grey dots are set for disabled.

Access Manager > Groups & Access Rights > Add Access Right > Schedule

**Access Right Time Schedule**

Existing Access Right Schedule: <-- Please select -->

Day	00	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23
Sun																								
Mon																								
Tue								●	●	●	●	●	●	●	●	●	●	●						
Wed																								

In the example above, the affected department and access group can only access the ACTatek terminal on every Tuesday from 07:00 to 17:59.

Press the **Add** button to add this access right to Access Manager. Notice that this access right only affects a single ACTatek terminal therefore to have this access rights affect all your ACTatek terminals, you will have to add a new access right for each individually ACTatek terminal. Use the existing access right schedule drop down list to load any already defined access schedules.

If an access right does not exist in Access Manager for a particular department and access group, this means that the users belonging to this group will not have access to any of the ACTatek terminals and they will receive an access denied message upon authentication.

To associate users to this department and access group, you will edit a selected user in **View/Edit User** and in the **Group** tab, check the listed department and group relevant to this user and uncheck all that are no longer relevant. Press the **Update** button to save the changes. A user can belong to more than one access groups.

## 4.8 View/Edit Access Right

The administrator can view/edit/delete any defined access rights in Access Manager by using this functionality. By default, all registered ACTatek terminals will create an access right with the department **General** and group **General Staff**. This means all newly registered users will have access to all the ACTatek terminals in the system. The administrator may want to remove these default access rights so that the newly registered users must be placed in their correct department and group before allowing them access on the ACTatek system.

## 4.9 Edit Triggers

Make changes to the trigger name/value for an individual ACTatek terminal by clicking **Edit** for the corresponding trigger and terminal ID you wish to edit. The administrator can choose to disable all unused triggers by clicking on the edit action and selecting disabled and then followed by clicking on **Update**.

Access Manager > Triggers & Holidays > Edit Triggers

Terminal Name / SN  
ACTatek / 00111DA040A4

Search

Terminal ID	Trigger	Trigger Name	Status	Actions
00111DA040A4	IN	IN	Enabled	<a href="#">Edit</a>
00111DA040A4	OUT	OUT	Enabled	<a href="#">Edit</a>
00111DA040A4	F1	F1	Disabled	<a href="#">Update</a> <a href="#">Cancel</a>

Make all trigger changes to an individual ACTatek terminal and you can use the **Copy Trigger** function found in the **Terminal** menu to copy triggers from this ACTatek terminal to all the remainder ACTatek terminals if they share the same triggers to reduce redundant work.

## 4.10 Trigger Schedule Setup

Based on a schedule, the administrator can choose enable or disable triggers. To setup this functionality, select an ACTatek terminal from the drop down list. In the Day & Time field, select a trigger ID, time frame, date, and specify either enabled or disabled. To save this schedule, press **Modified Time** button and the changes will now reflect on the trigger schedule field. When ready, press the **Setup** button to make the final changes. By default, the trigger schedule settings are on disabled and affect no days of the week unless checked.

## 4.11 Holiday Setup

The administrator can specify days that are considered as holidays. Simply select the date from the calendar and type in a descriptive description. Press the **Add** button to save it in Access Manger. The administrator can remove any existing holidays that were added previously. The use of holidays is for grouping days that can be effected by a schedule. For example, access rights are affected by a schedule therefore an administrator can define an access right to deny all entries for specific access groups on holidays since the law may forbid the staff from working and entering the facility.

## 4.12 Door Open Schedule

The administrator may set an open door policy to enforce any doors controlled by the ACTatek terminals to be opened based on a set scheduled and closed otherwise. By default, the schedule settings are on disabled and affect no days of the week unless checked. In the **Day & Time** field, set enabled with a selected time frame and check all days that will be affected by this change. By pressing **Modify Time**, this will update the **Time Schedule** to reflect the future modifications. Notice that the black filled dots represent enabled and the light grey dots represent disabled. The example below indicates the door will remain open on every Monday from 00:00 to 23:59.

Day	00	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23
Sun	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Mon	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Tue	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•

Ensure to select an ACTatek terminal in the drop down list to affix this schedule to so the affected ACTatek terminal will know to leave its door open. Press the **Setup** button to finalize all the changes to the ACTatek terminal. For all remainder ACTatek terminals, you may choose to use an existing open door schedule that has been applied to another ACTatek terminal or create another customized open door schedule if necessary.

## 4.13 Bell Schedule

If any of the ACTatek terminal is connected to a bell ringer, the administrator can set the bell to ring based on the programmed bell schedules. By default, there is no bell schedule in Access Manager. To add a new bell schedule, select an ACTatek terminal from the drop down list for this schedule to take place and configure the Day & Time fields. Check the days in the week for this schedule to come into effect and press the **Setup** button to save all changes.

## 4.14 View Event Logs

Administrators can view event logs that have been collected from the ACTatek terminals in real time. Additionally, the administrator may choose to use the search option to search for specific events and export the results in a CSV file. The **View EventLog Viewer** button shows all event logs collected in real time with the newest at the top of the list. By pressing on the Search button, the results will be displayed as a static page.

**Access Manager > Event Logs > View Event Logs**

**Search Options**

User ID  Last Name  First Name

Period  OR Start Date  End Date

Terminal Name / SN  Department  Event

**Access Manager > Event Logs > View Event Logs > Search Results**

Timestamp	UserID	First Name	Last Name	Department	Event	Terminal SN	Terminal	
2013-08-12 10:48:01 AM	B14			General	IN	00111DA04B19	ACTatek	<a href="#">Detail</a>
2013-08-12 10:47:42 AM	B13			General	IN	00111DA040A4	ACTatek	<a href="#">Detail</a>
2013-08-12 10:47:37 AM	B13			General	IN	00111DA04B19	ACTatek	<a href="#">Detail</a>
2013-08-12 10:47:01 AM	B12	Mike		General	IN	00111DA040A4	ACTatek	<a href="#">Detail</a>
2013-08-12 10:46:51 AM	B12	Mike		General	IN	00111DA04B19	ACTatek	<a href="#">Detail</a>
2013-08-06 3:59:10 PM	C14			General	F2	00111DA04B19	ACTatek	<a href="#">Detail</a>
2013-08-06 3:59:00 PM	C14			General	F1	00111DA04B19	ACTatek	<a href="#">Detail</a>
2013-08-06 3:48:56 PM	C12			General	F2	00111DA04B19	ACTatek	<a href="#">Detail</a>
2013-08-06 3:42:24 PM	C12			General	IN	00111DA04B19	ACTatek	<a href="#">Detail</a>
2013-08-06 3:42:06 PM	C12			General	IN	00111DA04B19	ACTatek	<a href="#">Detail</a>

## 4.15 Add Manual Event Logs

The administrator can add events to Access Manager for corrections in the system. To begin, specify the **User ID** of an existing user. Now select the terminal ID, the appropriate event trigger, the date, the time, and leave a remark as a reason to add this manual event. Press the **Add** button to complete the process and the manual event will be added into Access Manager which can then be searchable in **View Event Logs**.

## 4.16 View/Delete Manual Event Logs

The administrator can view all event logs that have been added manually into Access Manager and delete any incorrect manual events. Put a check in the boxes to the corresponding events and press the **Remove** button to permanently delete them.

## 4.17 View Terminal List

View Terminal List shows the status and details of all registered ACTatek terminals. This page will provide the ACTatek terminals' serial number, model, IP address, firmware version, user count, device's online/offline status and sync information. Additionally, the administrator may choose to use the search option to search for specific department associated terminals and export the List in a CSV/TXT file. By pressing on the Search button, the results will be displayed as a static page.

**TERMINAL LIST**

System Information

Number of registered terminals: 2

Refresh

Export

File Format:

TXT

Export

Search Option

Department

<-- All -->

Department Name

Department Description

Search

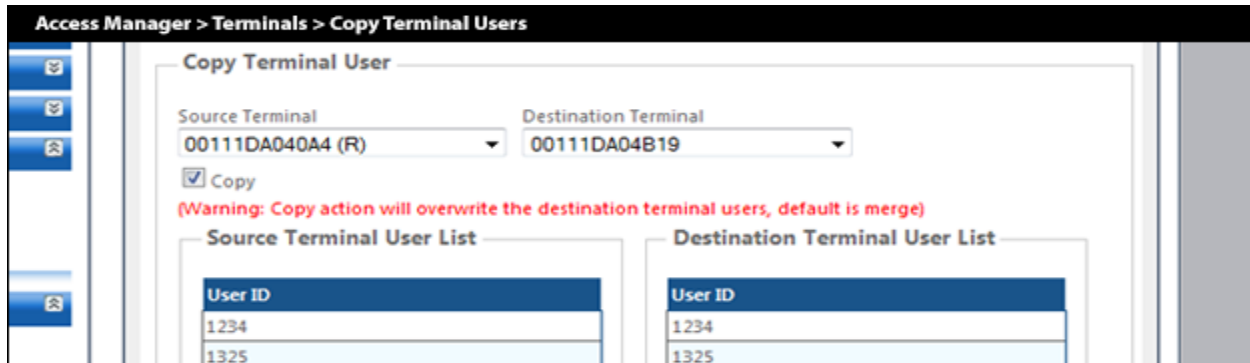
Terminal List Page Size

Page Size: 5

Serial Number	Name	Model	URL Link	Firmware Version	Registered User	Last Update	ID	Action	Pending Request
00111DA04B26	ACTatek Test Unit-1	ACTA3-5K-FLI-SM-C	<a href="#">192.168.8.102</a>	actatek_3_06.1504	9/5000	6/1/2017 9:58:50 PM	Online	<a href="#">Details</a>	
00111DB00B0D	ACTatek Test Unit-2	ACTA3-5K-FLI-SM	<a href="#">192.168.8.103</a>	actatek_3_06.1504	9/5000	6/1/2017 10:02:49 PM	Online	<a href="#">Details</a>	

## 4.18 Copy Terminal User

Copy terminal user allows the administrator to copy the user data found in Access Manager or in another ACTatek terminal as the source to another ACTatek terminal as the destination. When auto user synchronization is disabled, copy terminal users may be deemed useful.



## 4.19 Copy Group Access Right

Copy group access right allows the administrator to copy the access rights associated to the source terminal to a destination terminal as selected in the drop down list. In addition, access rights are listed to show which access rights will be copied over to the destination terminal from the source terminal.

## 4.20 Copy Trigger

Copy trigger allows the administrator to copy the triggers found in one ACTatek terminal to another. Select an ACTatek terminal to use as the source and another ACTatek terminal as the destination. Press **Copy** button to save the changes.

## 4.21 Department Association

Department association allows the administrator of AMS to associate specific ACTatek terminals to a department in AMS. Secondary AMS administrators which are configured with rights to a specific department can now manage all details that belong to their department. To accomplish this, select an ACTatek terminal from the terminal list and select a department and press the **Associate** button to add this association.

## 4.22 Data Import

The data import utility allows the administrator to import multiple users into Access Manager using a CSV file. Firstly, set your delimiter and check **First row contains field names**. Next, press the **Browse** button and select the CSV file containing the user's information. Press **Load** button and it will read the CSV file into Access Manager.

Access Manager > Utilities > Data Import > Load CSV File								
P20 <input type="text" value="fx"/>								
	A	B	C	D	E	F	G	H
1	User ID	First Name	Other Name	Last Name	Password	Card SN		
2	C1000	Mike		Apple	1	60203838E		
3	C2000	John		Smith	1	60203838F		
4								
5								
6								

Now press the **Data Mapping** tab to configure all additional settings for the users which will contain user level and privileges, departments, groups, and user status.

Access Manager > Utilities > Data Import > Data Mapping

CSV Data

Data Mapping

☐ Auto Generate User ID
 --Prefix--

Data Mapping

User ID

First Name

Other Name

Last Name

Card SN

Password

User ID

First Name

Other Name

Last Name

Card SN

Password

Settings - apply to all loaded users

General

Status & Expiry

Departments

Groups

FP Security Level

Admin Level

Card Type

Site code

Decimal

Normal

User

<-- Please select -->

<-- Please select -->

Decimal

Press the **Import** button to import the configured settings and users to Access Manager.



## **Chapter 5: Access Manager Workforce Management**

### **5.1 Reports**

To run reports, the administrator has the options to filter by user ID, department, and time frame. Press the **View Report** button in each report section to generate the report as required. When the report is finished generating, you may choose to export it as an Excel, Word, or PDF file.

**Daily In/Out Report:**

Shows a report with the first IN event and last OUT event of the day with the total working hours.

**Detail Report:**

Shows a report with sequential IN and OUTs event of the day with the total working hours.

**Absent Report:**

Shows a report of users that were absent or present on the day.

**Late Report:**

Shows a report of users that were late with the restriction where the administrator specifies the finished time.

**User Status Report:**

Shows a report of users with a status (anyone that has punched in with a trigger) on the day of. The administrator may choose to add filters to only display a specified trigger before pressing the **View Report** button.

**Roll Call / Fire Report:**

Shows a report of users with a status of "IN" or "OUT" or both as specified by the administrator prior to searching.

**Auto In/Out Report:**

Shows a report with sequential IN and OUTs event of the day with the total working hours if the AMS has Auto In/Out feature on.

### **5.2 Lunch In/Out**

The **Lunch In/Out** feature is used when you would like to enforce a lunch time period so no users can punch in from break until the set time is reached. If they try to punch back in from break before the set time has reached, it will reject them on the ACTAtek terminals.

To enable this feature, go into the **Control Panel** tab and then **System Configuration**. Change **APB setting** to **LUNCH IN/OUT** and press **Update** button to save. Set a **LUNCH OUT** time to allow LUNCHOUT

trigger to be used when the user goes on their break. Set a **LUNCH IN** time to allow LUNCHIN trigger to be used after their break is over. The ACTatek terminal will allow LUNCHIN trigger after the time has passed the set LUNCH IN time in AMS.

Next, **Edit Triggers** on an ACTatek terminal through the AMS web interface.

Set F1 to "LunchOUT" and F2 to "LunchIN" **or** F3 to "LunchOUT" and F4 to "LunchIN."

Use **Copy Trigger** function and copy them over to all remainder ACTatek terminals.

**Control Panel > System Configuration > APB Setting**

**Access Manager APB Setting**

APB Setting: **LUNCH IN/OUT** Lunch OUT: **12** **00** Lunch IN: **13** **00**

**Update**

Reset All

IN

**Update**

**Access Manager > Triggers & Holidays > Edit Triggers**

**Search Options**

Terminal Name / SN: **ACTatek / 00111DA04B19** **Search**

Terminal ID	Trigger	Trigger Name	Status	Actions
00111DA04B19	IN	IN	Enabled	<a href="#">Edit</a>
00111DA04B19	OUT	OUT	Enabled	<a href="#">Edit</a>
00111DA04B19	F1	LunchOUT	Enabled	<a href="#">Edit</a>
00111DA04B19	F2	LunchIN	Enabled	<a href="#">Edit</a>

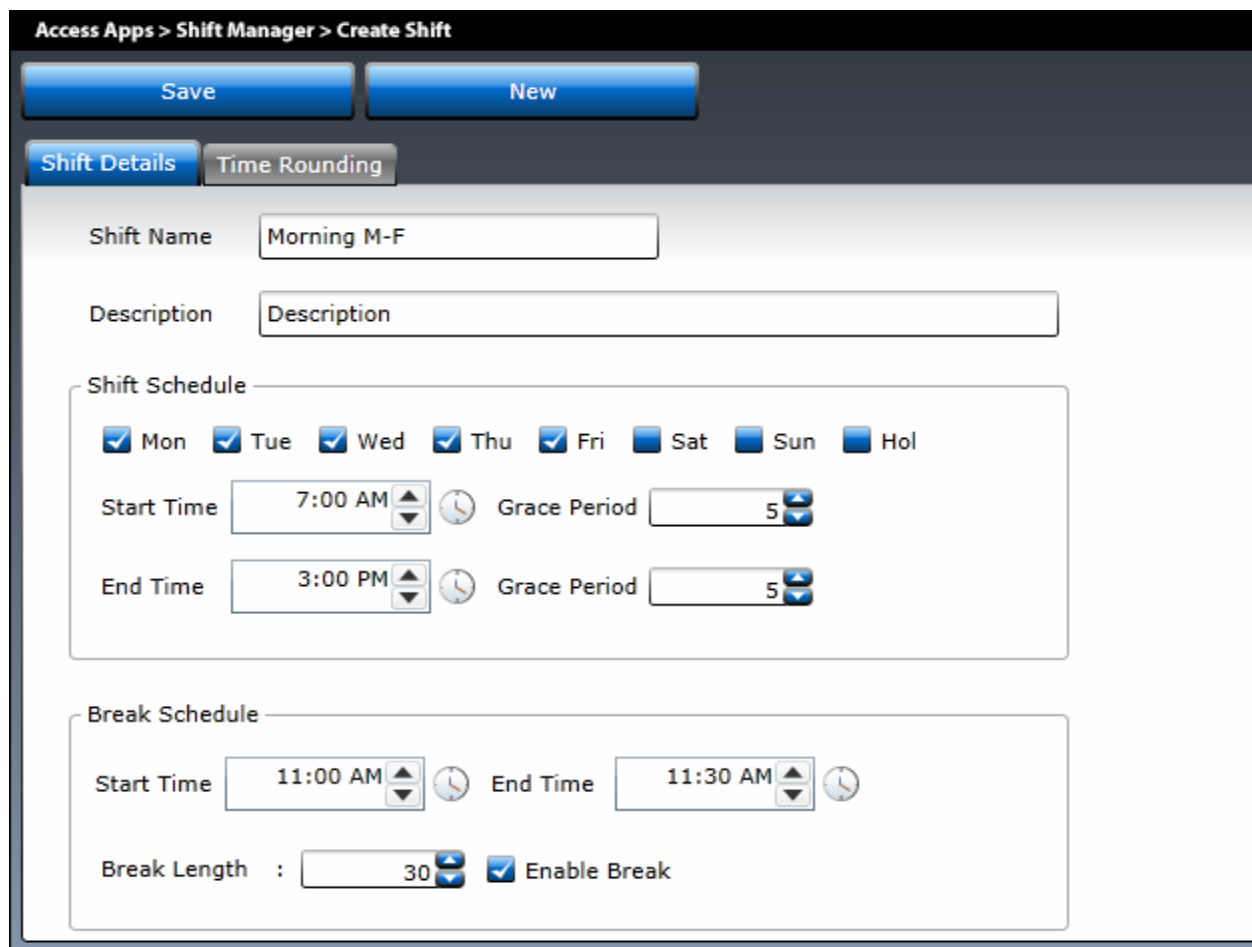
When the user presses the F1 shortcut key on the ACTatek terminal, it will bring them to the LunchOUT trigger and etc. When the user punches with trigger LunchOUT, it will signify to AMS that the user is on lunch break. When the user punches in with trigger LunchIN, it will be accepted if the punch was made after 13:00 as seen in the images above or else they will be rejected.

## 5.3 Access Manager Suite Work force Management Shift Manager – Access Application

### 5.3.1 Create New Shifts

For every unique shift that comprises of different working hours, you will have to create them individually in **Shift Manager**. Provide a **Shift Name** and **Description** such that it can easily be recognized in the later steps. Fill out the necessary information in the **Shift Schedule** section such that it meets your shift's criteria. **Grace Period** is the time specified in minutes that allow employees to punch after or before the **Start/End** time without facing any penalties in their assigned shifts.

**Break Schedule** can also be configured on the same page. The **Start Time** is the time specified to allow breaks to occur. The **End Time** is the time specified to no longer allow breaks. Choose a **Break Length** in minutes and check **Enable Break** if breaks are allowed in this shift. Press the **Save** button to finish.



Access Apps > Shift Manager > Create Shift

Save New

Shift Details Time Rounding

Shift Name: Morning M-F

Description: Description

Shift Schedule

☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☐ Sat ☐ Sun ☐ Hol

Start Time: 7:00 AM Grace Period: 5

End Time: 3:00 PM Grace Period: 5

Break Schedule

Start Time: 11:00 AM End Time: 11:30 AM

Break Length: 30 ☒ Enable Break

### 5.3.2 View/Edit Shifts

By pressing on **Edit Shift** in the menu, you will be displayed a list of shifts that is currently present in **Shift Manager**. As an administrator, you can choose to delete or edit an existing shift entry.

To edit an existing shift, press the **Edit** button that is aligned on the same row as the shift you want to make changes to. Make all changes to the shift and press **OK**. Press the **Update** button to save the changes to **Shift Manager**. If you forget to press the **Update** button, you will lose all changes that you have made.

	ID	Shift Name	Start Time	Shift End	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Hol	
Edit	1	Morning	07:00	16:00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete

To delete a shift, press the **Delete** button that is aligned on the same row as the shift you wish to delete. Press the **Update** button to save the changes to **Shift Manager**.

### 5.3.3 Assign Shifts to Employees

On the menu, press **Assign Employee Shifts** and press the **Filter** button to obtain the list of users present in **Access Manager**.

User ID	First Name	Last Name
A999		
B11		James

At the top, you can search by using the **Filter** option such that only users that meet the filter requirements either by **User ID, First Name, Last Name, Shift, and/or Department** will be presented in the user list. If no filter options are used and the **Filter** button is pressed, it will list all the users found in Access Manager.

User ID	First Name	Last Name
A999		
B11		James
B12	Mike	
B13		
B14		
C11		
C15		
C14		
1234	admin	
1325	admin	
2115	admin	

Shift	User ID
1	B11
1	B12
1	B13

To assign employees or users to shifts created in **Shift Manager**, choose a specific shift in the drop down menu and press the **Load Shift** button. This will associate the selected shift into **Shift Manager** thus now the **Assign Employee** options are available. Select employees from the left user list and press the '**Add >**' button to associate that user to the loaded shift. All existing or newly added users associated to the loaded shift will appear in the user list on the right side. To remove any users from the loaded shift, simply click on that user in the right user list and press the '**< Remove**' button.

To finalize all changes, always press the **Commit** button to save the changes to **Shift Manager**.

## 5.3.4 Reporting

Press the **View Report** button in the menu to generate report in **Shift Manager**. Shift Manager Reporting gives you the flexibility to filter by **User ID** and also by **Time**. By specifying a **User ID** and a **Time**, you can generate a user report for the week, or for 2 weeks, or for the month, and even for the year. By leaving the User ID field out, you can generate reports containing all employees. Daily reports can also be generated for auditing purpose.

For every changes made in the filter criteria, you will need to press **Load Data Report** button such that it will acquire the event data related to the filter from Access Manager.

User ID	First Name	Last Name	Shift Name	Day	Date
B12			Morning	Mon	2013-08-26
B11			Morning	Mon	2013-08-26
A999			Morning	Mon	2013-08-26
B13			Morning	Mon	2013-08-26

Then afterwards, press the **Generate Report** button to create the report from the gathered event data. The **Export Report** button allows you to save the generated report on the page to CSV file type which can be opened later with any spreadsheet software.

**Grace Rounding** and **Time Rounding** options can be checked if they are applicable to the reporting as required. Press **Generate Report** button to update the report such that the rounding options are taken account for.

User ID	First Name	Last Name	Shift Name	Day	Date	Timestamp IN	Timestamp OUT	Time IN	Time OUT	Total Time
B12			Morning	Mon	2013-08-26	--	--	--	--	--
B11			Morning	Mon	2013-08-26	--	--	--	--	--
A999			Morning	Mon	2013-08-26	--	--	--	--	--
B13			Morning	Mon	2013-08-26	--	--	--	--	--
B14			Morning	Mon	2013-08-26	--	--	--	--	--
C11			Morning	Mon	2013-08-26	2013-08-26 12:08:46	--	12:08	--	--
C15			Morning	Mon	2013-08-26	2013-08-26 07:04:00	2013-08-26 16:04:00	07:04	16:04	9
C14			Morning	Mon	2013-08-26	--	--	--	--	--
1234			Morning	Mon	2013-08-26	--	--	--	--	--
1325			Morning	Mon	2013-08-26	--	--	--	--	--
2115			Morning	Mon	2013-08-26	--	--	--	--	--
5321			Morning	Mon	2013-08-26	--	--	--	--	--
6312			Morning	Mon	2013-08-26	--	--	--	--	--

## Chapter 6: Access Manager Suite Workforce Management and Access Control Advance Features

### 6.1 APB Requirements

Software & Firmware	Version
Access Manager Suite	1.2.3.64 or newer
Actatek 3 Firmware	3_06.1302 or newer

The advance features will require the Access Manager Suite Server to reside on the same local area network as the ACTatek terminals for the best possible outcome. Authentication is determined by the status of the users from the Access Manager Suite Server when working with multiple ACTatek terminals therefore a low latency network is required.

**In any event where the Access Manager Suite Server goes offline or the ACTatek terminal loses communication with AMS server, the ACTatek terminal will not be able to request a server side authentication and instead record an ID UNKNOWN event record while the ACTatek terminal screen shows ID Reserved AMS Offline during the punch.**

### 6.2 Auto In/Out

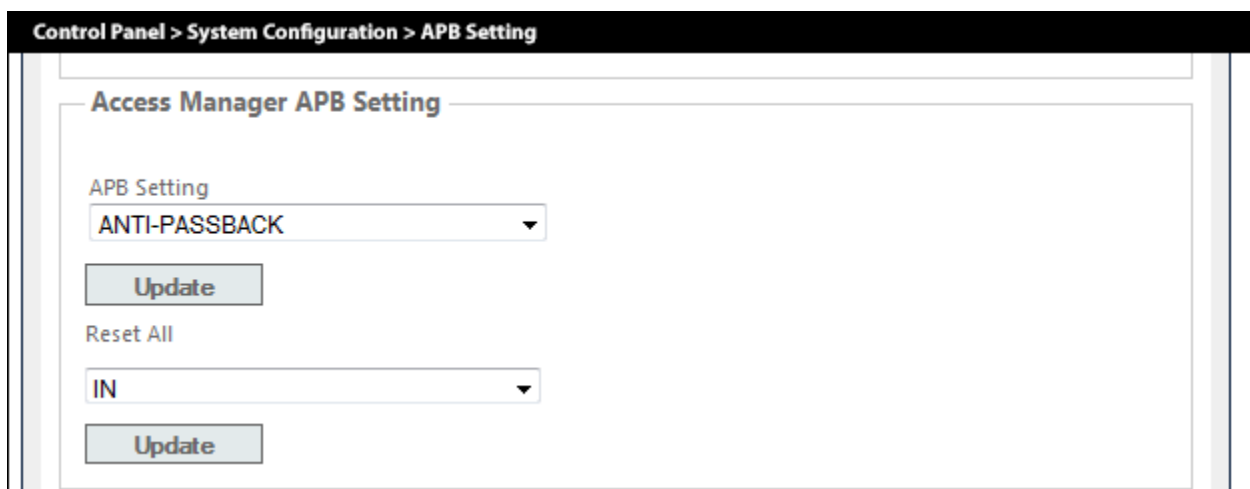
The **Auto In/Out** feature allows the ACTatek terminal to use server side authentication to automatically determine the IN or OUT status of a user during authentication and records a preceding punch event based on the user's previous event. To enable this feature, go into the **Control Panel** tab and then **System Configuration**. Change **APB setting** from **DEFAULT** to **AUTO IN/OUT** and press **Update** button to save. The ACTatek terminals will now only show **AUTO** on the LCD screen.

If the Auto Reset box is checked, it will reset the Auto In/Out system such that all users will punch **IN** event after the specified time has been reached on the ACTatek terminal per day no matter if they have last punched IN or OUT.

**Reset All** can be used at anytime by pressing the **Update** button. This will reset all users with the status you have selected. For example, if all user status is reset with **IN** status Auto In/Out system will determine the next punch as an **OUT** event for all the users.

## 6.3 Anti-Passback

The **Anti-Passback** feature is used for controlling area of access such that the user must proceed with **IN** event and then forced to use **OUT** event and not **IN** again. An example scenario where Anti-Passback would be used is to ensure that the user enters through the first door with ACTatek terminal set on IN and then exit using the second door with ACTatek terminal set on OUT.



The screenshot shows the 'Control Panel > System Configuration > APB Setting' interface. It features a section titled 'Access Manager APB Setting'. Inside this section, there is a label 'APB Setting' above a dropdown menu currently set to 'ANTI-PASSBACK'. Below the dropdown is an 'Update' button. Further down, there is a 'Reset All' label above another dropdown menu currently set to 'IN'. Below this second dropdown is another 'Update' button.

To enable this feature, go into the **Control Panel** tab and then **System Configuration**. Change **APB setting** to **ANTI-PASSBACK** and press **Update** button to save. To use this feature, only triggers **IN** and **OUT** will be affected by Anti-Passback.

**Anti-Passback** feature when enabled requires active network communicate between ACTatek terminals and AMS server as authentication requests is validated by the AMS server. In any event where the AMS server goes offline or the ACTatek terminal loses communication with the AMS server, the ACTatek terminal will not be able to request a server side anti-passback validation and instead record an **ID UNKNOWN** event while the LCD screen shows **ID Reserved AMS Offline** during the punch. User status remains unchanged where there occurred an incommunicable anti-passback authentication at an ACTatek terminal.



## 6.4 User Message

This feature is available in AMS 1.2.3.74 or newer. To leave a message for a user that can be viewed on the LCD screen of an ACTatek upon a successful authentication, go to **View/Edit User** and select the user by pressing **Edit** in the **Action** column. Navigate to the **User Message** field and check **Enable LCD** followed by typing the message in the **Message** field and then pressing the **Update** button to submit the user changes. To remove an active user message, uncheck **Enable LCD** for the user.

The screenshot shows the 'User Message' configuration page. The breadcrumb trail at the top is 'Access Manager > View/Edit User > Edit > User Message'. The page title is 'User Message'. There are two input fields: 'Email Address' with the placeholder 'Type Email Address Here' and 'Handphone Number' with the placeholder 'Type Handphone Number He'. Below these are three checkboxes: 'Enable LCD' (checked), 'Enable SMS' (unchecked), and 'Enable Email' (unchecked). A 'Message :' label is followed by a text input field containing 'Please pay your monthly rent by the end of the month.'. Below the text field, it says 'You have 7 characters remaining for your message..'. There is no 'Update' button visible in this specific view.

## 6.5 Send Email

To configure AMS to send email notifications to users, go to **Control Panel** and then **System Configuration**. Navigate to the **Email Setting** and provide SMTP credentials into email server, port, user, and password fields. Check the **Enable Email** and press **Set** to save email settings.

The screenshot shows the 'Email Setting' configuration page. The breadcrumb trail at the top is 'Control Panel > System Configuration > Email Setting'. The page title is 'Email Setting'. There is a checkbox 'Enable Email' which is checked. Below it are four input fields: 'Email server' with the value 'smtp.gmail.com', 'Port' with the value '25', 'User' with the value 'example@actatek.com', and 'Password' with masked characters (dots). A 'Set' button is located at the bottom right of the form.

It is recommended to start with a GMail account with the below settings:

Example Settings	
Email Server	smtp.gmail.com
Port	25
User	GMail username
Password	GMail password

If you do not have a GMail account, you can create one. The GMail account that is supplied to AMS will be the email address that will send out emails to the users.

Control Panel > System Configuration > Email Setting

Email Setting

Email setting saved

Email server: smtp.gmail.com

Port: 25

User: example@actatek.com

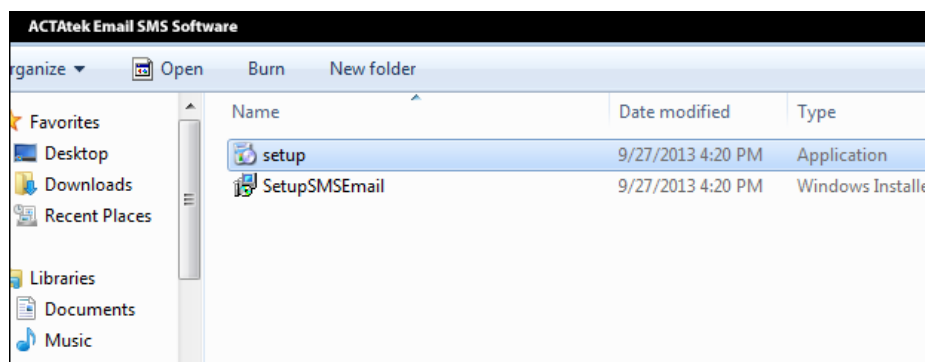
Password: ●●●●●●●●

Set

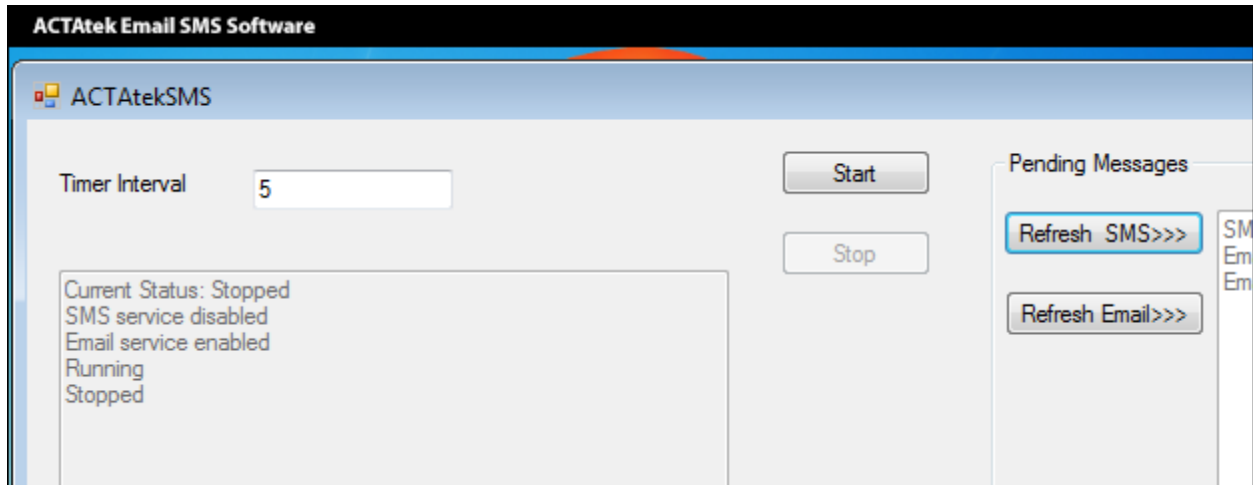
**Email setting saved** message will appear when all the settings are set correctly with SMTP server communication is established. If error message **Error Logging In** is present, this means either the email setting has problems or your Internet Service Provider may have blocked SMTP port. Please contact your Internet Service Provider for more details.

Now download and install 'ACTatek SMSEmail' Software on the server or computer running Access Manager Suite.

[http://actatek-sgo.servehttp.com/products/winapp/public/PreRelease/AMS\\_SMSEMail\\_v74.zip](http://actatek-sgo.servehttp.com/products/winapp/public/PreRelease/AMS_SMSEMail_v74.zip)

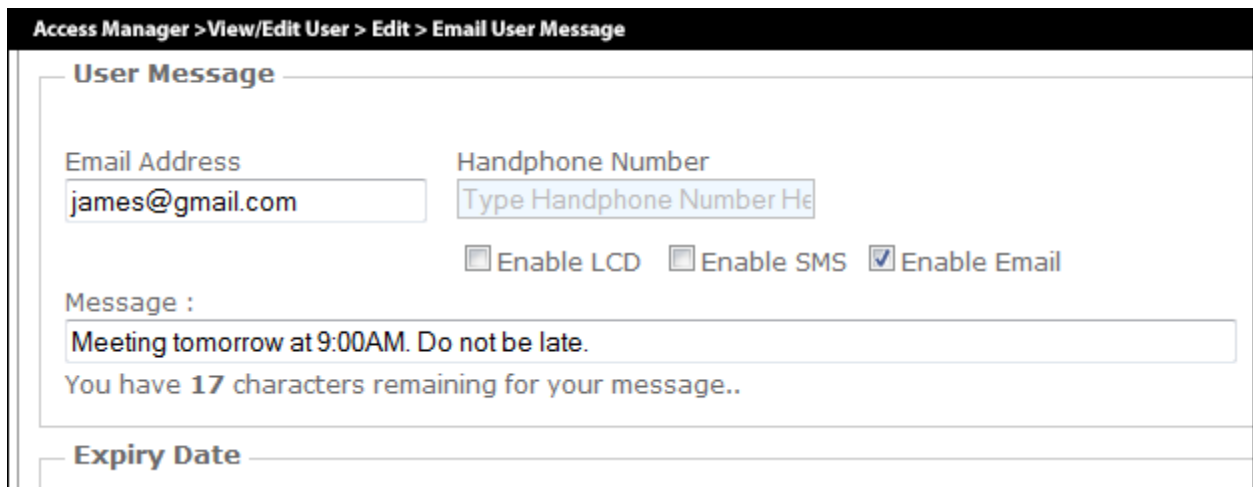


Run the ACTatek SMSEmail Software in administrator mode after installation.



Set **Time Interval** to a value in seconds. This value is the refresh time for the ACTatek Email SMS software to check for pending emails created by Access Manager to be sent out. Press **Start** to initiate the software to check for pending AMS emails.

To leave an email message for a user, go to **View/Edit User** and select the user by pressing **Edit** in the **Action** column. Navigate to the **User Message** field and check **Enable Email** and provide the user's email address followed by the message in the **Message** field. Press the **Update** button to submit the user changes. To stop sending the email message on authentication, uncheck **Enable Email** for the user.



To send email alerts to a specific person instead of the user, supply the email address of the specific person (Parent/Manager/Boss) into the user's profile and that email address on file will receive emails when and what time this user has authenticated.

**Access Manager > View/Edit User > Edit > Email User Message**

---

**User Message**

Email Address:  Handphone Number:

☐ Enable LCD ☐ Enable SMS ☒ Enable Email

Message :

You have **60** characters remaining for your message..

---

**Expiry Date**


**Example Email from Access Manager**

← ↓ ! ▢ Move to Inbox ▾ More ▾


---

**Email Service From AccessManager** ▢

---

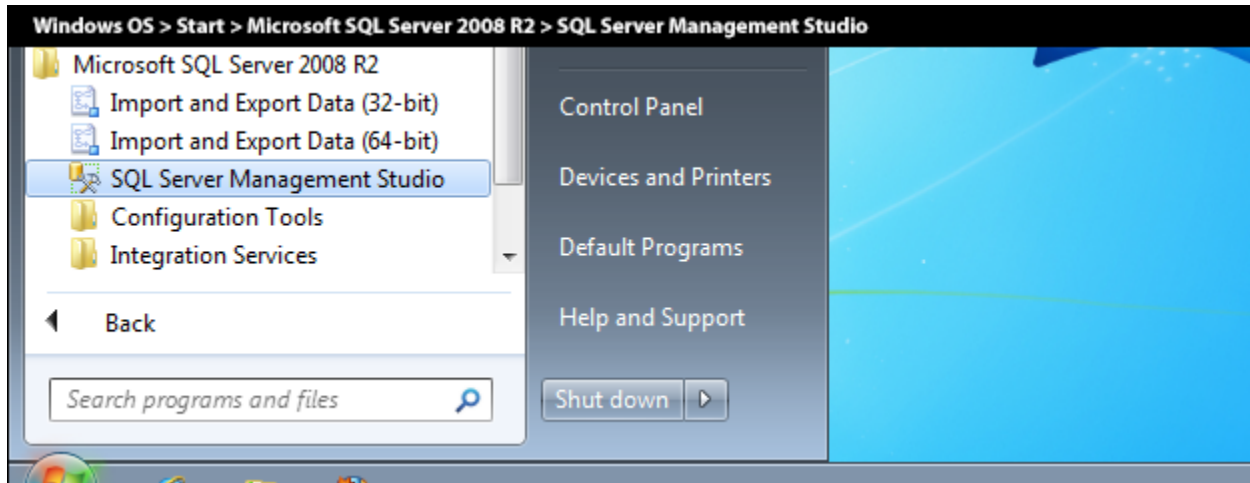
 **actatektest@gmail.com**  
to threed94 ▾  
00042014 Imane 4/28/2014 6:18:36 PM IN ACTatek 00111DB00735

---

 **actatektest@gmail.com**  
to threed94 ▾

## Chapter 7: Upgrading AMS Software

### 7.1 Database Backup



Run **SQL Server Management Studio** and log in using either SQL Server Authentication or Windows Authentication. If the SQL Server is installed on your local computer, by default the server name is:

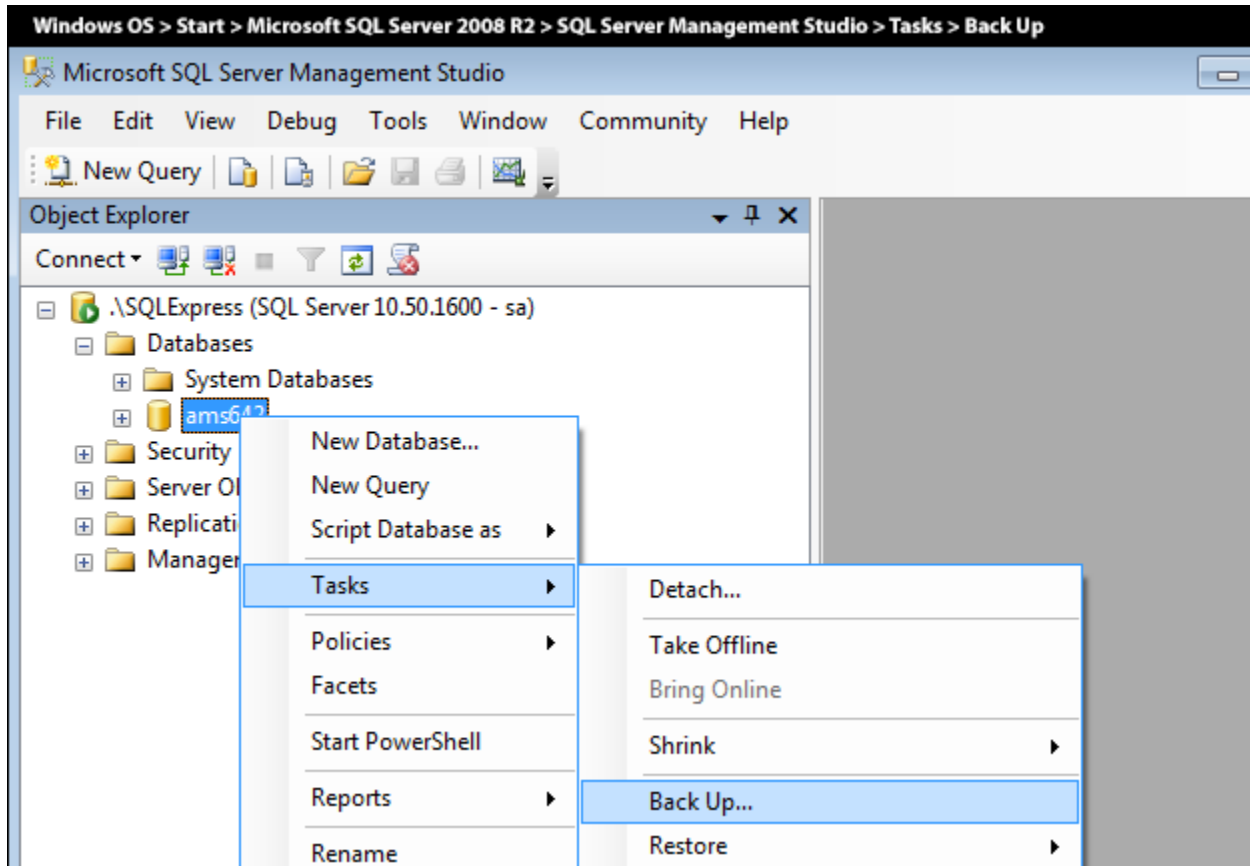
[Local Access] .\SQLExpress

or

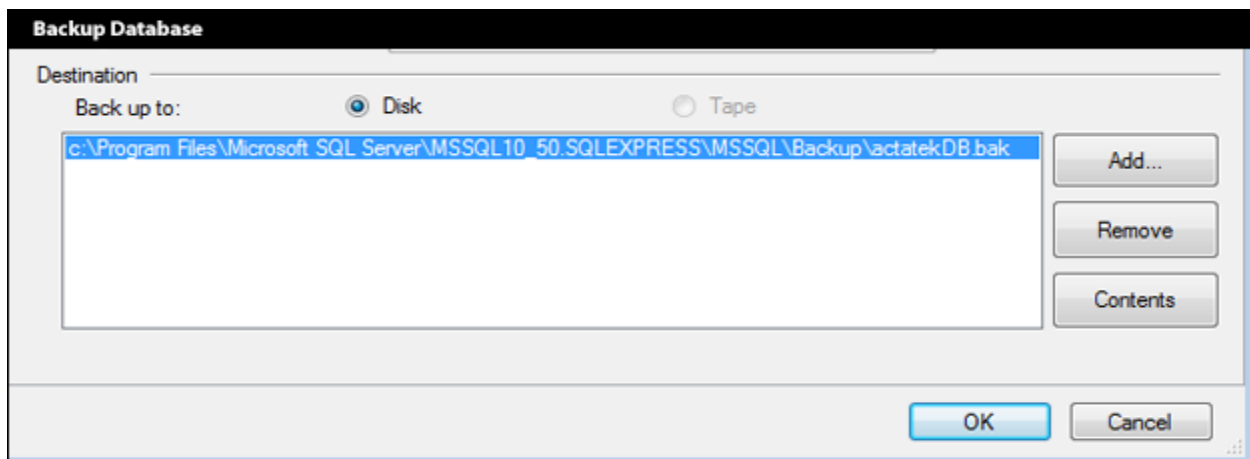
[Network Access] [IP ADDRESS OF SQL SERVER](#)\SQLExpress



Once you have connected to the SQL Server, in the **Object Explorer** located on the left, expand **Databases** to display the current databases in the SQL Server. Right click on the database you wish to back up and select **Tasks** and then **Back Up...**



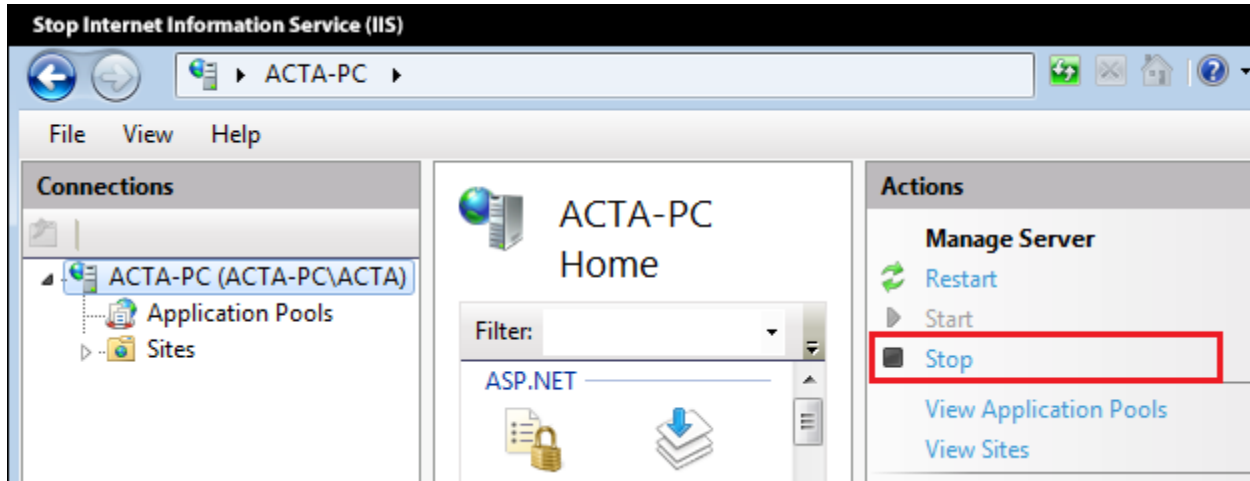
**Back Up Database** window will now appear and by default, the setting is set to backup the database in full. In the **Destination** field, you will find the location where the backup database will be stored. Press **OK** button when you are ready. Upon completion, a success message will appear.



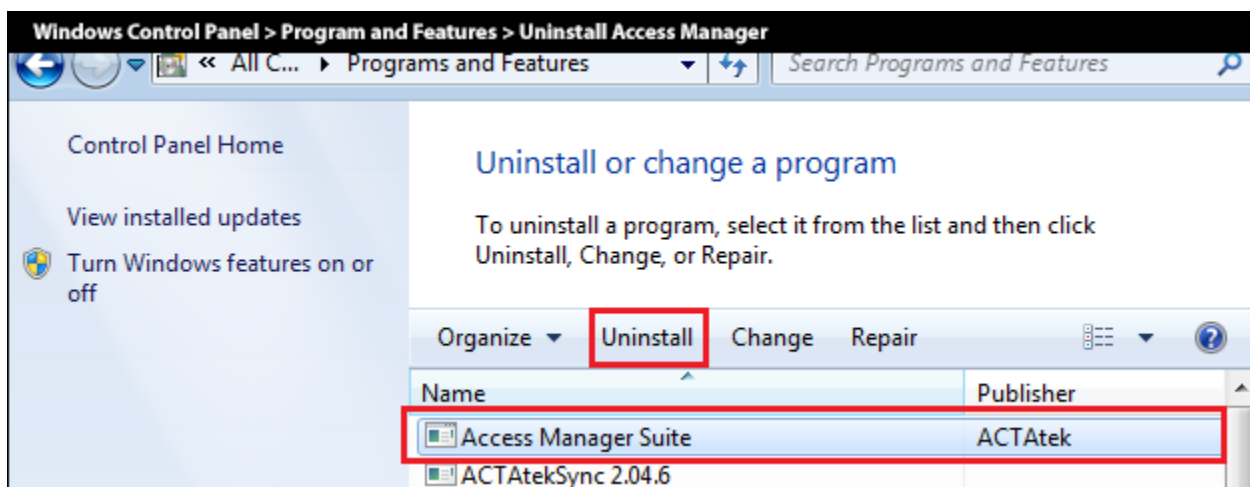
## 7.2 Upgrading AMS from 1.0.1.x to 1.2.3.x

It is highly recommended to make a back up copy of the current AMS database before proceeding.

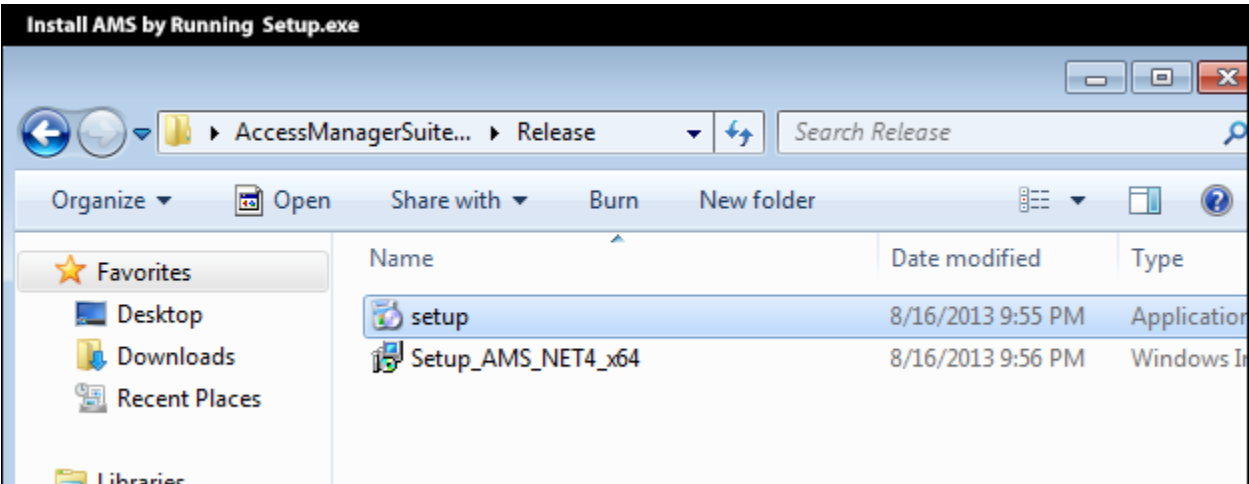
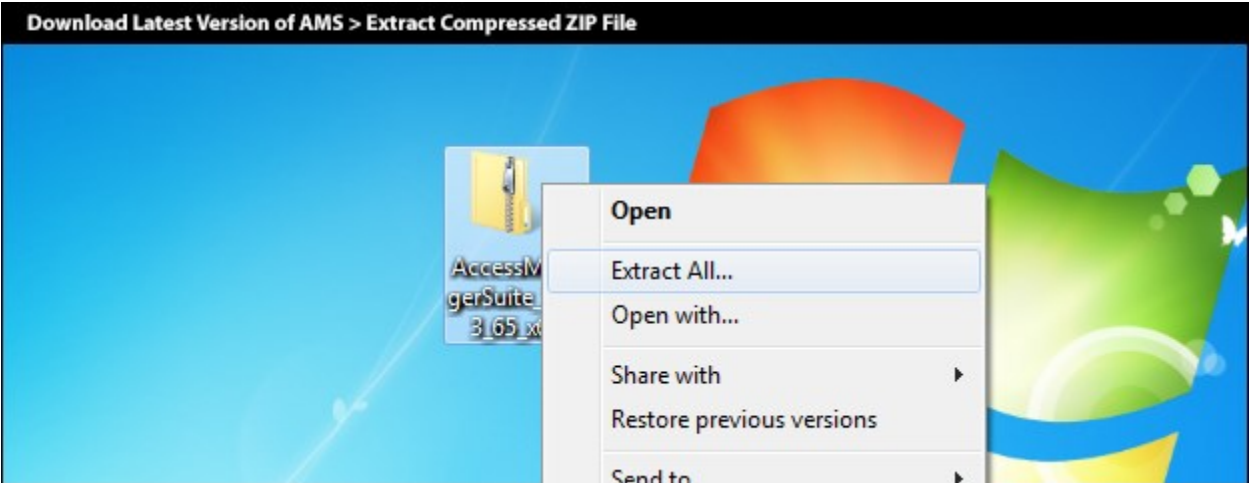
When upgrading your **AMS** from **1.0.1.x** to **1.2.3.x**, the first step is to **stop** your **Internet Information Service (IIS)**. This will allow you to uninstall Access Manager Suite without complications since it is no longer running as a service.



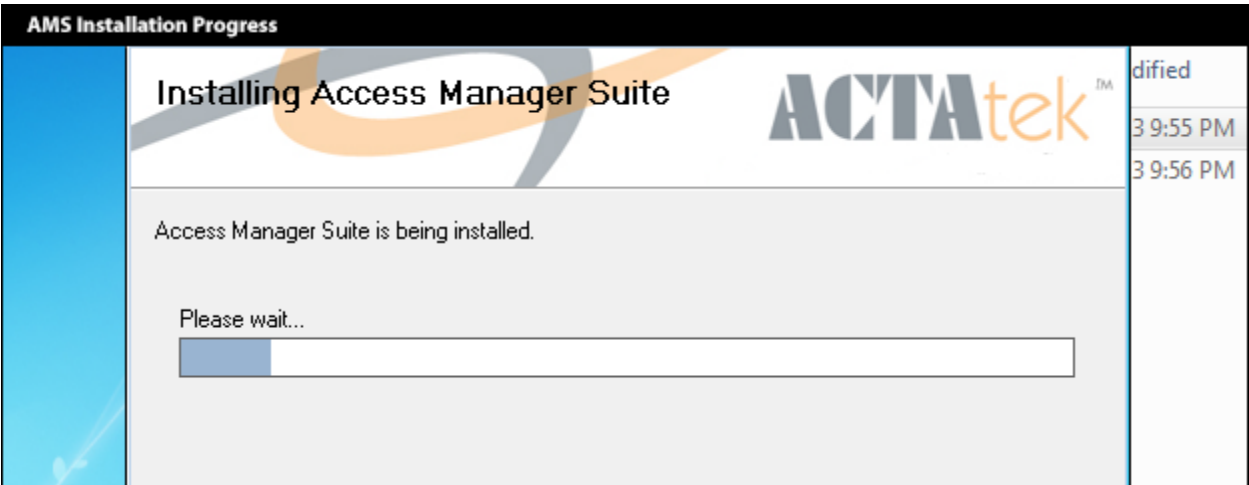
Go to Window's **Control Panel** and then **Program and Features**. In this list, select **Access Manager Suite** and press **Uninstall**. Follow the **Windows Installer** to remove AMS completely. When **Access Manager Suite** software is no longer on this list, you have successfully uninstalled AMS.



Download the latest version of AMS. Extract the compressed ZIP file that contains the installation files to the newest version of AMS. Open its folder and run **setup.exe** to continue with the installation process.

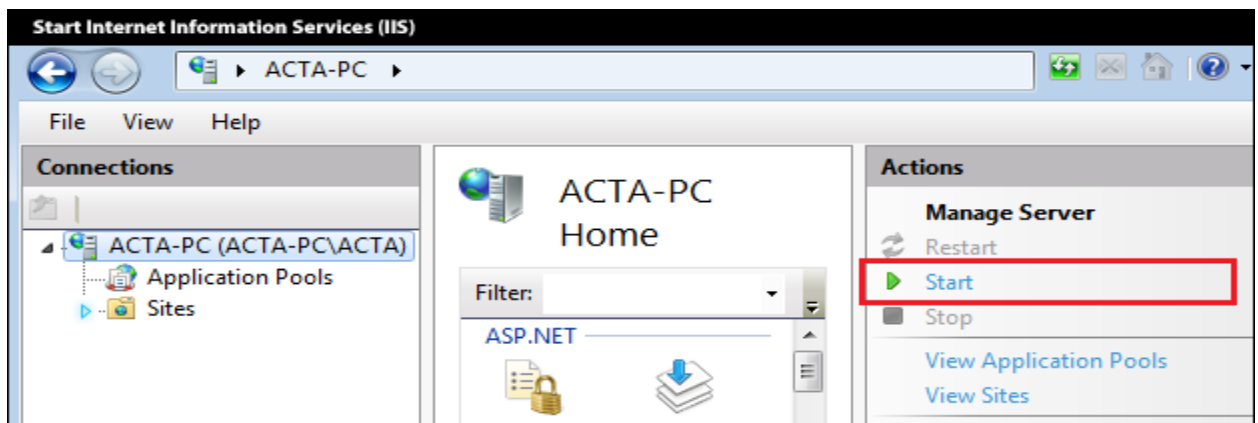
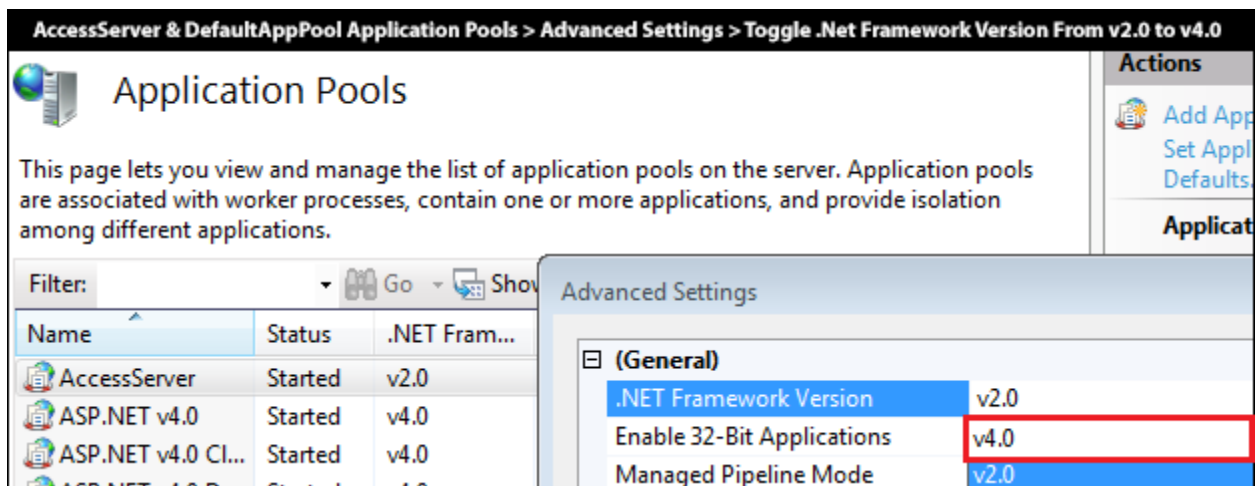
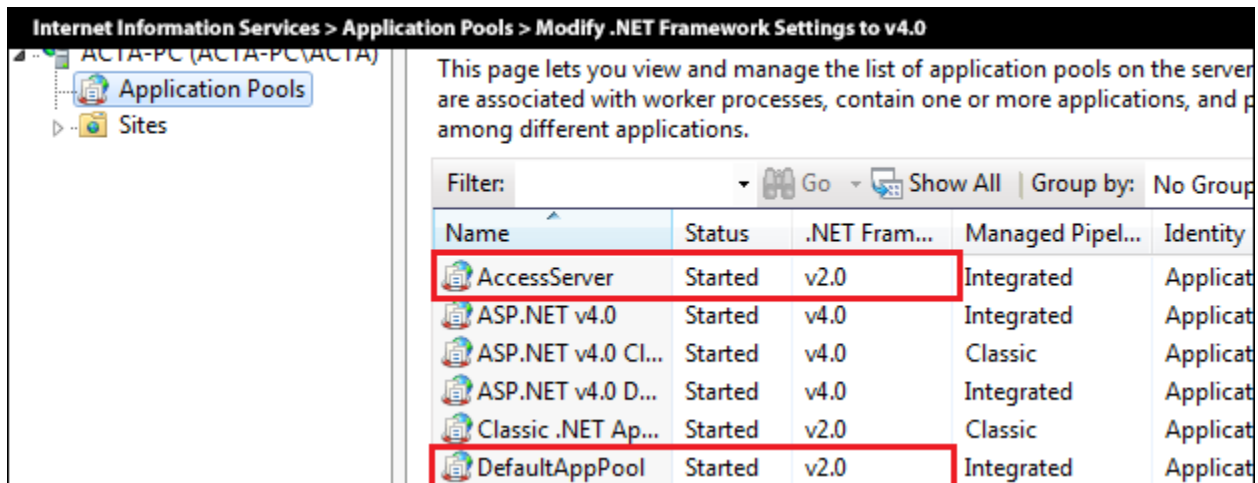


Follow the AMS installation wizard by pressing the **Next** button.





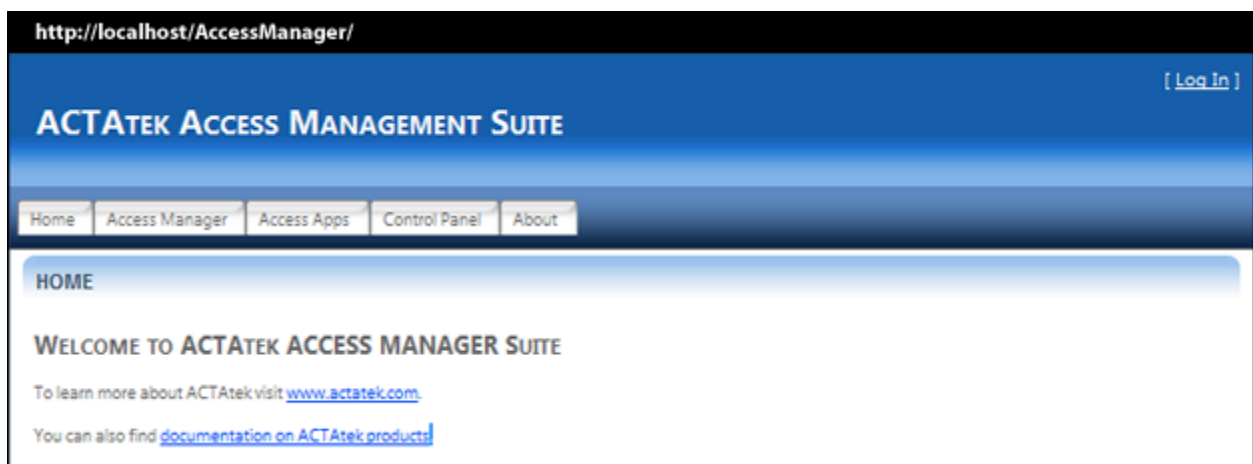
Once the AMS installation has completed, go back to Internet Information Services (IIS) window and go into **Application Pools**. Right click with your mouse on **AccessServer** as highlighted below and select **Advance Settings**. Change .NET Framework Version from **v2.0** to **v4.0** and press the OK button to save the changes. Do the following to the **DefaultAppPool** so it is also using .NET Framework Version v4.0.



Now in the actions field for managing servers in IIS, press the **Start** action to start up IIS so AMS can run as a service and be accessible on your web browser.



If you receive the following error as shown above when trying to access the Access Manager web interface, this means you have not configured the .NET Framework to v4.0 correctly in IIS. Please revert back a couple of steps to find instructions on how to change .NET Framework from v2.0 to v4.0 for **AccessServer** and **DefaultAppPool** application pools in order for AMS to run properly.



If you have configured IIS correctly to use the .NET Framework v4.0, you should now be able to access the new version of AMS on your browser. By default, the URL to access AMS is:

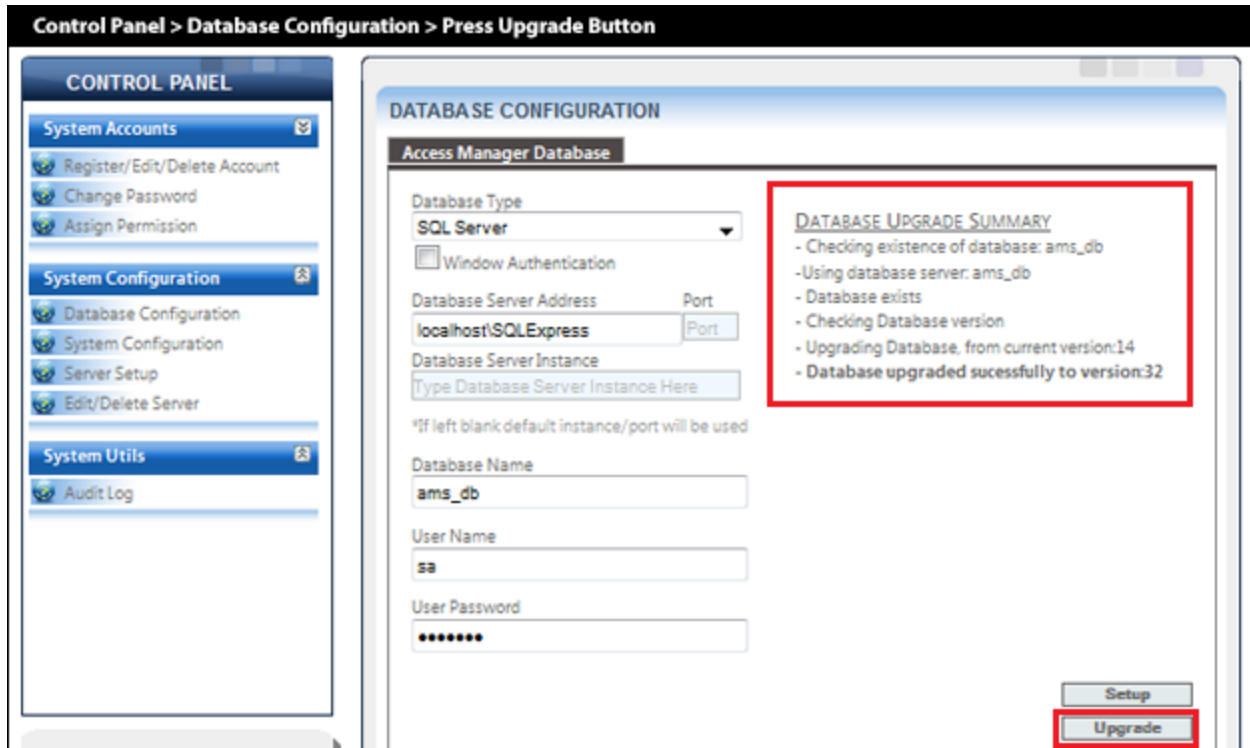
[Local Access] <http://localhost/AccessManager/>

or

[Network Access] <http://IP ADDRESS OF SERVER/AccessManager/>

Login to AMS and then go to **Control Panel** and then **Database Configuration**. Press the **Upgrade** button to let the database know that a new version of AMS has been installed. When completed, the current

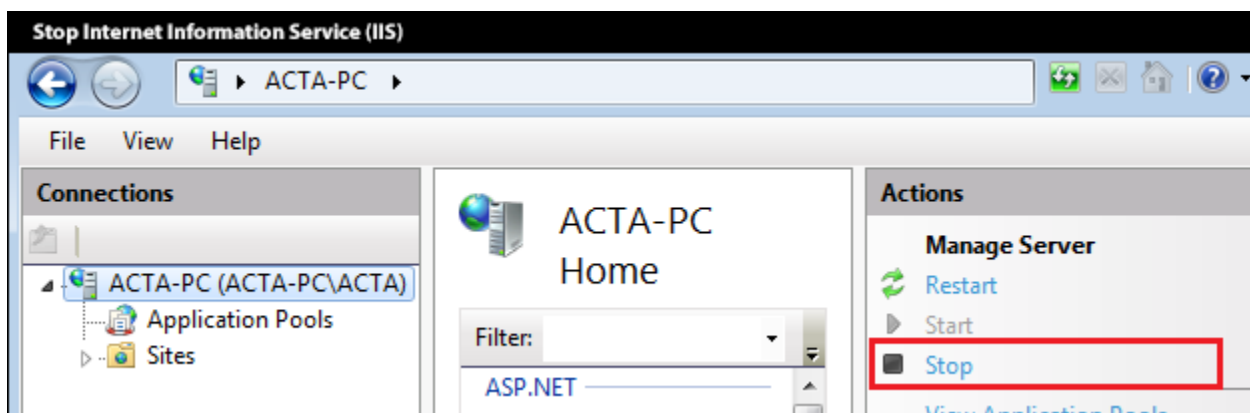
page should now produce a **Database Upgrade Summary** and let you know that the database has now been upgraded to a newer revision. You have upgraded AMS successfully from **1.0.1.x** to **1.2.3.x** and you may now use AMS.



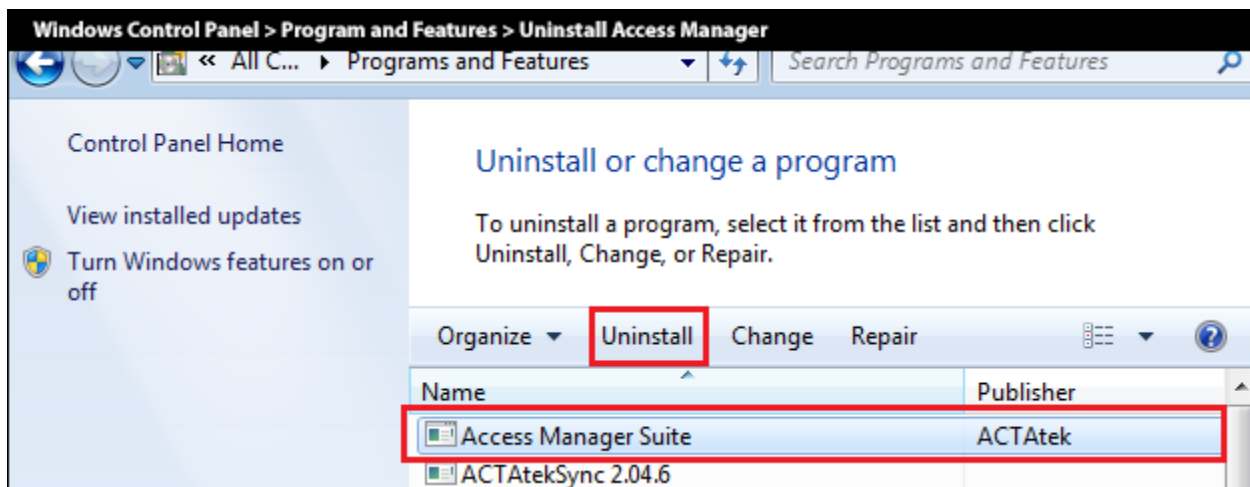
## 7.3 Upgrading AMS from 1.2.3.x to 1.2.3.x

It is highly recommended to make a back up copy of the current AMS database before proceeding.

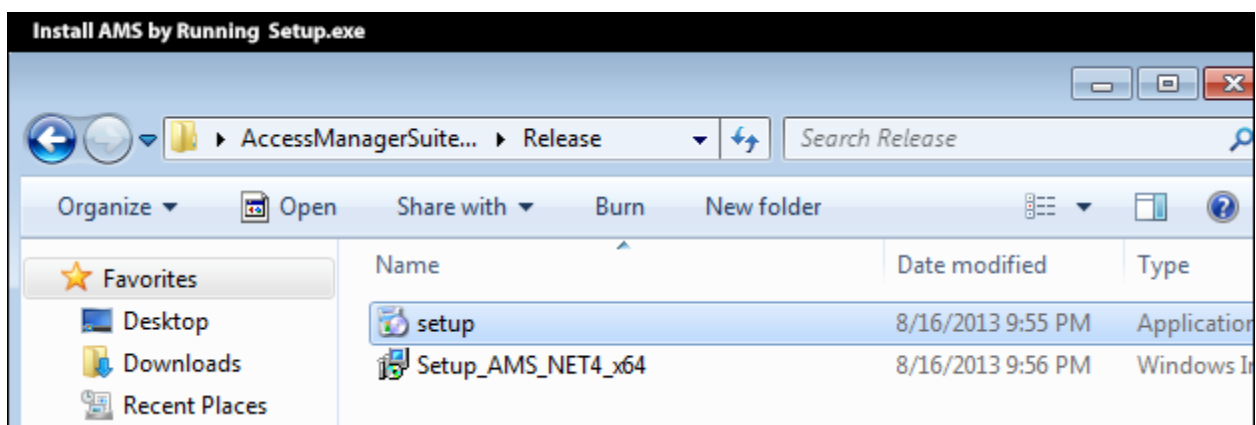
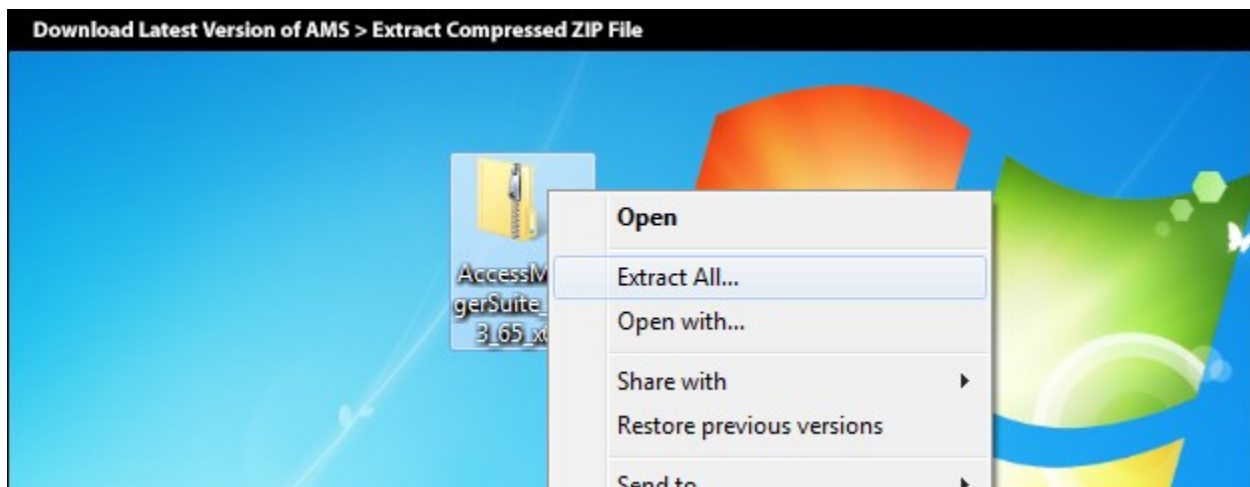
When upgrading your **AMS** from **1.2.3.x** to **1.2.3.x**, the first step is to **stop** your **Internet Information Service (IIS)**. This will allow you to uninstall Access Manager Suite.



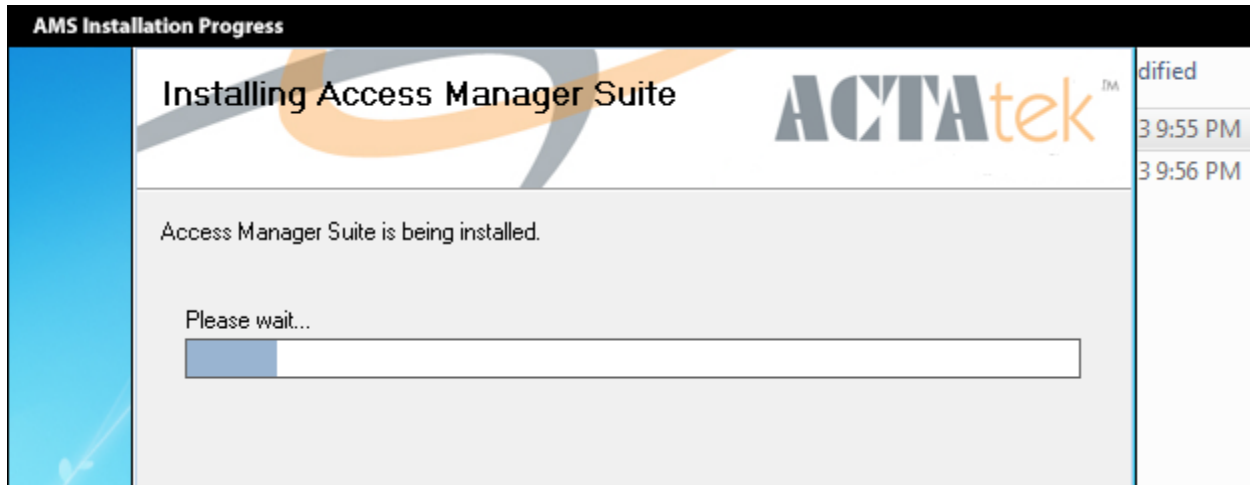
Go to Window's **Control Panel** and then **Program and Features**. In this list, select **Access Manager Suite** and press **Uninstall**.



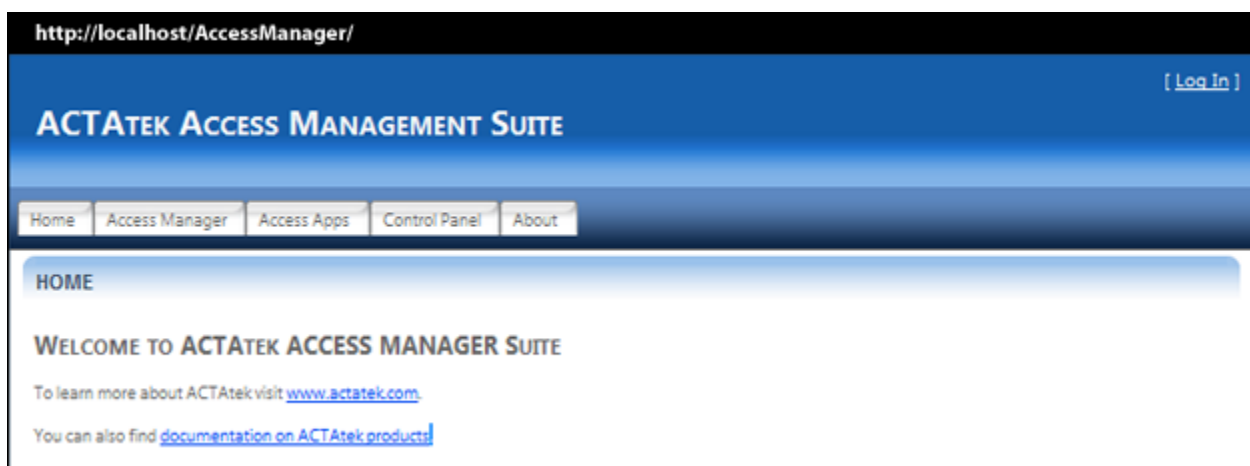
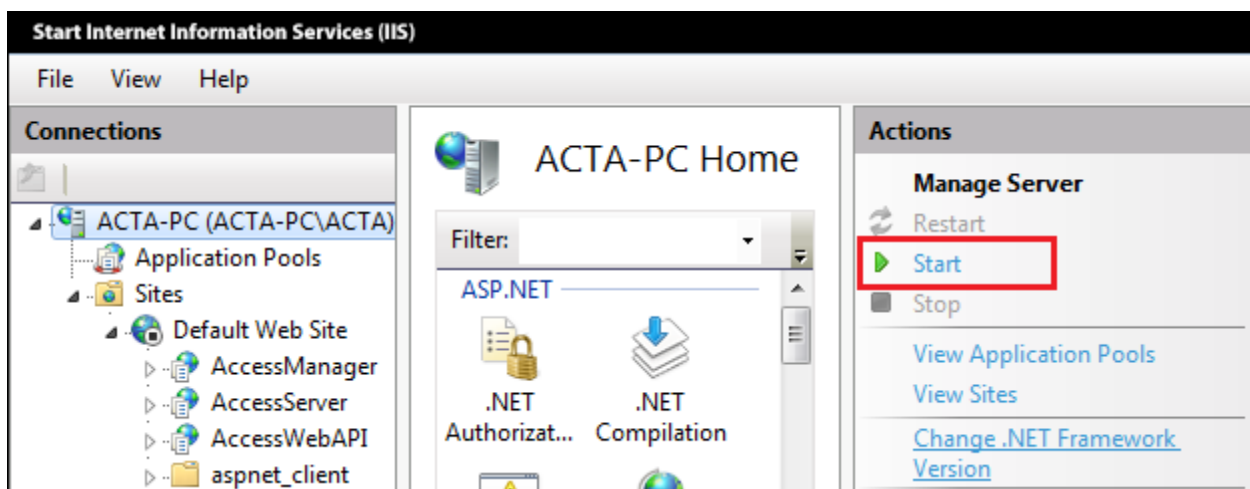
Download the latest version of AMS and extract the compressed ZIP file that contains the installation files of AMS. Run **setup.exe** to continue with the installation process.



Follow the AMS installation wizard by pressing the **Next** button.



When AMS has finished installing, go to IIS and press the **Start** button to reinitiate web services.



Login to AMS and then go to **Control Panel** and then **Database Configuration**. Press the **Upgrade** button to let the database know that a new version of AMS has been installed. When completed, the current page should now produce a **Database Upgrade Summary** and let you know that the database has now been upgraded to a newer revision. You have upgraded AMS successfully from **1.2.3.x** to **1.2.3.x** and you may now use AMS.

Control Panel > Database Configuration > Press Upgrade Button

**CONTROL PANEL**

- System Accounts
  - Register/Edit/Delete Account
  - Change Password
  - Assign Permission
- System Configuration
  - Database Configuration
  - System Configuration
  - Server Setup
  - Edit/Delete Server
- System Utils
  - Audit Log

**DATABASE CONFIGURATION**

Access Manager Database

Database Type  
SQL Server

☐ Window Authentication

Database Server Address  
localhost\SQLEXPRESS

Port  
Port

Database Server Instance  
Type Database Server Instance Here

\*If left blank default instance/port will be used

Database Name  
ams\_db

User Name  
sa

User Password  
\*\*\*\*\*

**DATABASE UPGRADE SUMMARY**

- Checking existence of database: ams\_db
- Using database server: ams\_db
- Database exists
- Checking Database version
- Upgrading Database, from current version:14
- Database upgraded successfully to version:32

Setup

Upgrade

## Appendix A. Site/Location Feature

The Access Manager terminal data is organized into sites/Location, each site/location will have terminal assigned to it. Terminals in a site/location will share the same user, departments and groups.

### Add/Edit/Delete Site

This feature allows the administrator to add, edit, or delete sites in Access Manager. Site also help categorize users and will be the foundation for setting up **Associate Location**. To associate users to sites, you will edit a selected user in **View/Edit User** and in the **Site/Location** tab, check the listed Site relevant to this user and press the **Update** button to save the changes.

**ACTATEK ACCESS MANAGEMENT SUITE**

Home | Access Manager | Access Application | Control Panel | About

**ACCESS MANAGER**

- Site
  - Add/Edit/Delete Site**
- Location
  - Add/Edit/Delete Location
- User
  - Add User
  - View/Edit User
  - Bulk Edit User
- Department
  - Access Group and Access Right

**ADD / EDIT / DELETE SITE**

✓ Site [UK] has been added successfully

Add Site

Site Name:  Description:

Site Name	Description	Action
Canada	Canada	<a href="#">Edit</a> <a href="#">Delete</a>
USA	USA	<a href="#">Edit</a> <a href="#">Delete</a>
Hong Kong	Hong Kong	<a href="#">Edit</a> <a href="#">Delete</a>
UK	UK	<a href="#">Edit</a> <a href="#">Delete</a>

### Add/Edit/Delete Location

This feature allows the administrator to add, edit, or delete Location in Access Manager. Location also help categorize users and will be the foundation for setting up **Associate Terminal**. To associate users to location, you will edit a selected user in **View/Edit User** and in the **Site/Location** tab, check the listed location relevant to this user and press the **Update** button to save the changes.

**ACTATEK ACCESS MANAGEMENT SUITE**

Home | Access Manager | Access Application | Control Panel | About

**ACCESS MANAGER**

- Site
  - Add/Edit/Delete Site
- Location**
  - Add/Edit/Delete Location**
- User
  - Add User
  - View/Edit User
  - Bulk Edit User
- Department
  - Access Group and Access Right
- Trigger and Holiday
  - Edit Trigger
  - Configure Trigger Schedule

**ADD / EDIT / DELETE LOCATION**

✓ Location [Liverpool] has been added successfully

Add Location

Location Name:  Description:

Location Name	Description	Action
New York	New York Office	<a href="#">Edit</a> <a href="#">Delete</a>
Los Angeles	Los Angeles Office	<a href="#">Edit</a> <a href="#">Delete</a>
Montreal	Montreal Office	<a href="#">Edit</a> <a href="#">Delete</a>
Calgary	Calgary Office	<a href="#">Edit</a> <a href="#">Delete</a>
Kowloon	Kowloon Office	<a href="#">Edit</a> <a href="#">Delete</a>
Tsuen Wan	Tsuen Wan Office	<a href="#">Edit</a> <a href="#">Delete</a>
London	London Office	<a href="#">Edit</a> <a href="#">Delete</a>
Liverpool	Liverpool Office	<a href="#">Edit</a> <a href="#">Delete</a>

## Associate Location

Associate location feature allows the administrator of AMS to associate specific site to one or multiple Location. To accomplish this, select a site name from the site list and select a location and press the **Associate** button to add this association.

**ACCESS MANAGER**

- Site
- Location
- User
- Department
- Access Group and Access Right
- Trigger and Holiday
- Door and Bell Schedule
- Event Log
- Terminal
- View Terminal
- Copy Terminal User
- Copy Terminal Access Right
- Copy Terminal Trigger
- Associate Location
- Associate Terminal
- Associate Department
- Utility
- Report

**LOCATION ASSOCIATION**

Site has been associated with the specified location successfully

Site and Location Association

Site Name | Description: Canada | Canada Location Name | Description: Associate

Page Size: 10 Refresh

Site and Location List

ID	Site Name	Location ID	Location Name	Delete
2	UK	11	Liverpool	Delete
3	UK	10	London	Delete
4	Hong Kong	9	Tsuen Wan	Delete
5	Hong Kong	8	Kowloon	Delete
6	USA	4	New York	Delete
7	USA	5	Los Angeles	Delete
8	Canada	7	Calgary	Delete
9	Canada	6	Montreal	Delete

## Associate Terminal

Associate Terminal feature allows the administrator of AMS to associate specific ACTatek terminals to a location in AMS. To accomplish this, select an ACTatek terminal from the terminal list and select a location from Location name list and press the **Associate** button to add this association.

**ACCESS MANAGER**

- Site
- Location
- User
- Department
- Access Group and Access Right
- Trigger and Holiday
- Door and Bell Schedule
- Event Log
- Terminal
- View Terminal
- Copy Terminal User
- Copy Terminal Access Right
- Copy Terminal Trigger
- Associate Location
- Associate Terminal
- Associate Department

**TERMINAL ASSOCIATION**

Location has been associated with the specified terminal successfully

Location and Terminal Association

Location Name | Description: Kowloon | Kowloon Office Terminal Name | SN: Associate

Page Size: 10 Refresh

Location and Terminal List

ID	Location Name	Terminal ID	Terminal Name	Delete
1	Kowloon	00111DA04B26	ACTatek Test Unit-1	Delete
2	Kowloon	00111DB00B0D	ACTatek Test Unit-2	Delete



# Site/Location Feature System Diagram

