

A modern office interior with glass walls, blue lighting, and a staircase. The scene is viewed through a blue-tinted overlay.

SOFTWARE 5.18 ENTERPRISE ORGANIZATIONAL ADMINISTRATOR

LEARNER GUIDE

VERSION 1

REVISION HISTORY

Revision		By	Date
1.0	Creation	J. Robles	03-Jan-2023
1.1	Revision	J. Robles	25-Aug-2023
1.2	Revision	J. Robles	02-Dec-2023

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1 Configuration



1.1 User Interface Elements

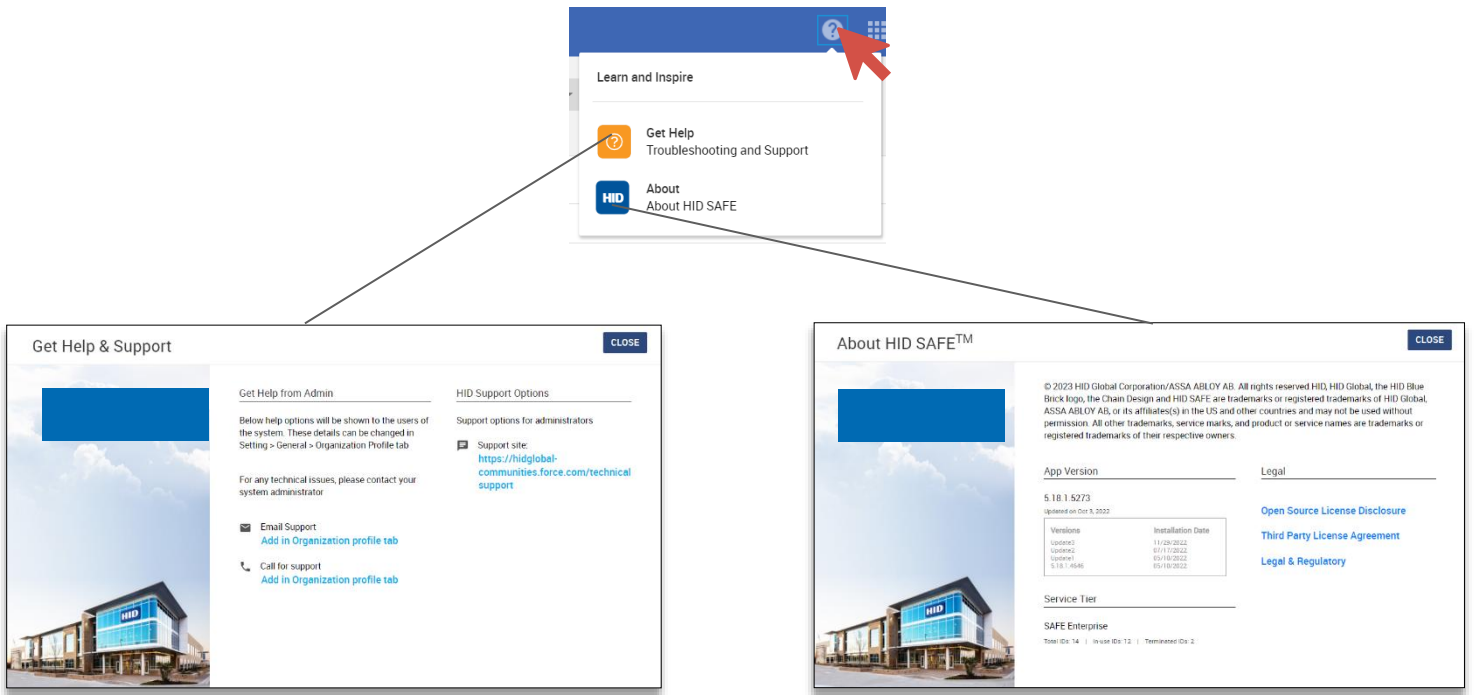
User interface elements are items used to navigate around SOFTWARE.

1.1.1 Ribbon



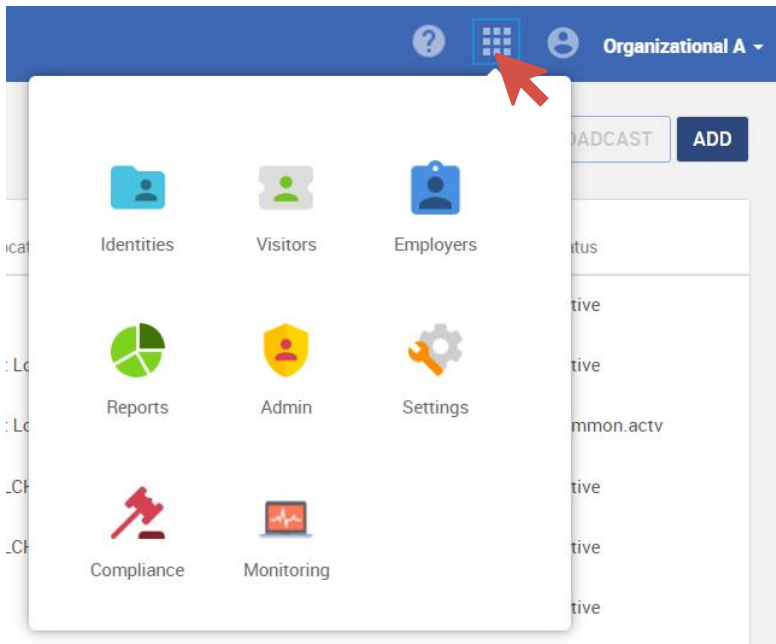
Icon Name	Icon	Icon Action
Hamburger Menu		Collapses and expands the Sub-Application Menu.
Logo		Returns you to your preferred default Page.
Help		Get technical support and view details about the SOFTWARE Software. (See 1.1.1 Help Icon Details)
App Switcher		Navigate between SOFTWARE Applications
User Settings	Organizational A ▾	Manages User preferences, password, and sign-out.

1.1.2 Help Icon Details



1.1.4 App Switcher

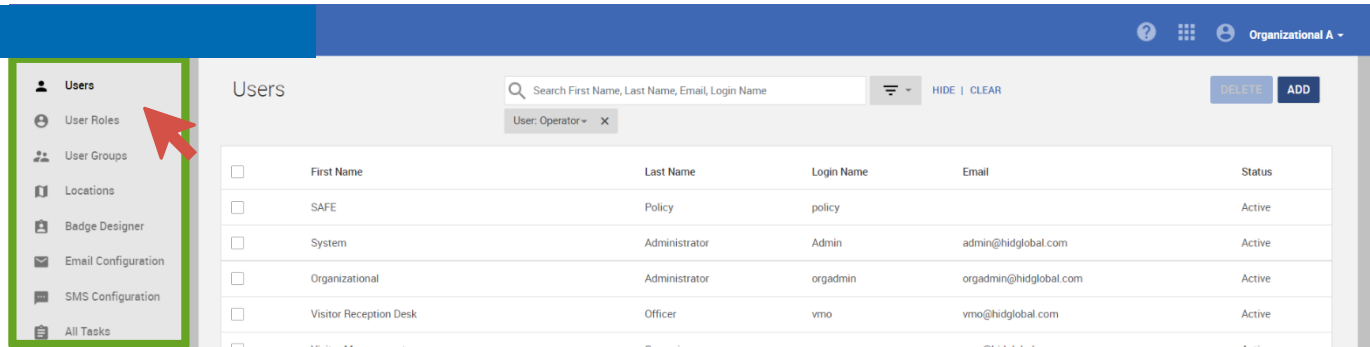
When we click on the App Switcher, we can see these Applications. Applications are used to navigate from one function of SOFTWARE to another. Application availability depends on the permissions set by User Roles or User Group. Each Application performs different tasks.



Application	Icon	Application Function
Identities		Manages all Employee information.
Visitors		Manages the visitor Check In, Check Out, and badging processes.
Employers		Manages employers that also utilize a shared working space.
Reports		Manages reporting and reporting dashboards for SOFTWARE Data.
Admin		Manages SOFTWARE configurations and access controls.
Settings		Manages SOFTWARE settings and preferences.
Compliance		Manages attestations, access privileges, and alerts.
Monitoring		Lists schedule logs, User sessions, and mail actions performed in SOFTWARE.

1.1.5 Sub-Applications

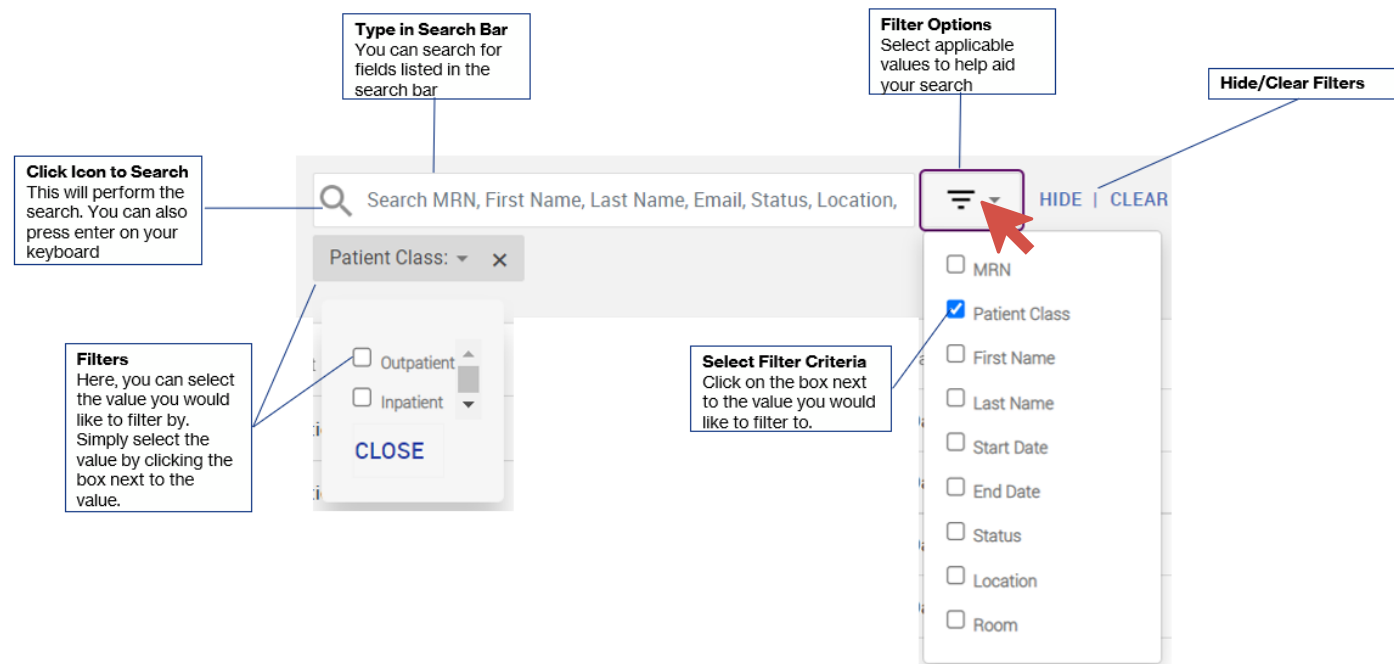
Sub-Applications are found on the left menu within each Application. Each Application has its unique menu of Sub-Applications. Think of them as different menu options within the Application.



1.2 Control Elements

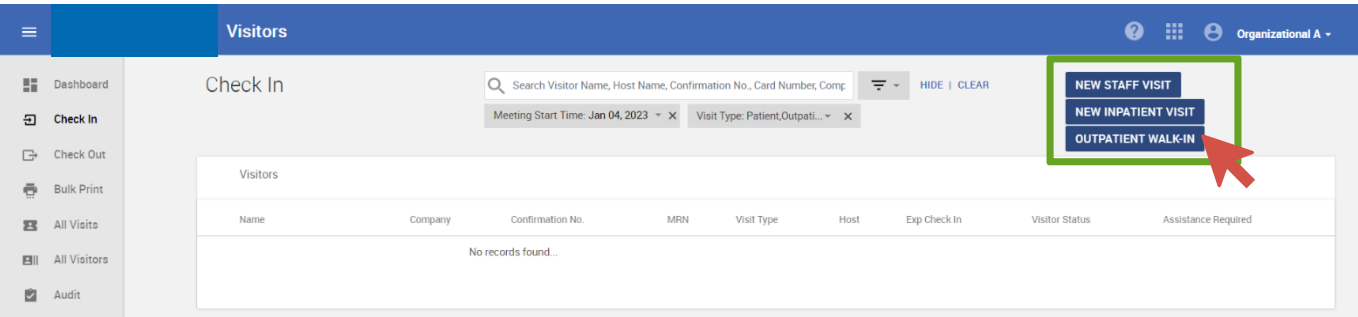
Control elements are what you use to interact with the SOFTWARE interface. They include things like selection boxes and drop-downs.

1.2.1 Search & Filter



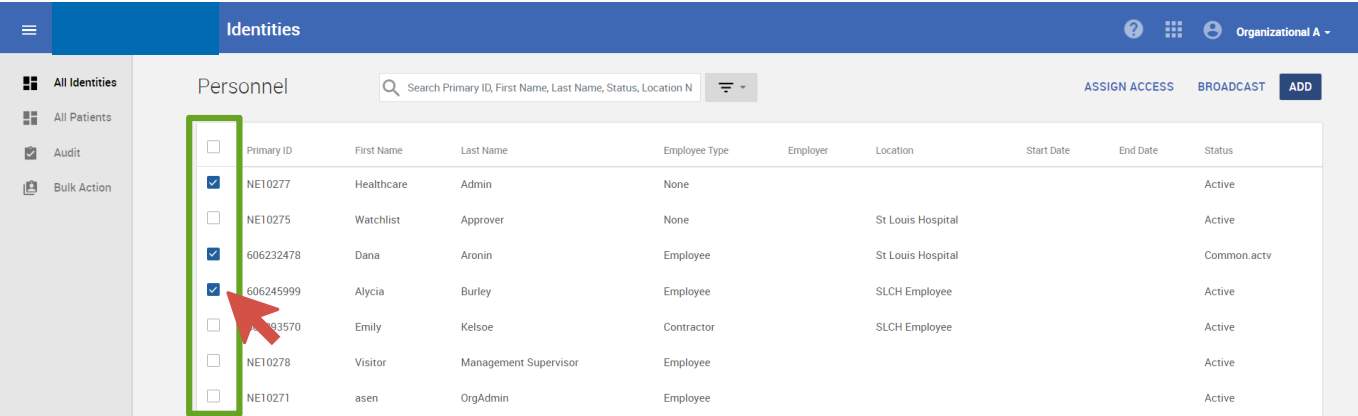
1.2.2 Action Buttons

These Action Buttons help us perform tasks like adding or deleting data, checking in visitors, and printing badges.



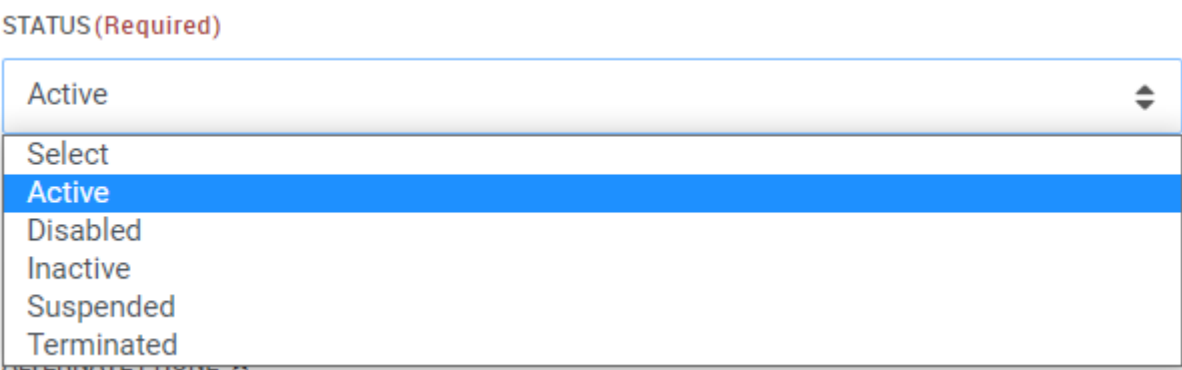
1.2.3 Selection Box

Selection boxes help you make multiple selections and apply actions to the selected records.



1.2.4 Drop-down

Drop-downs help make data entries more uniformed.



1.2.5 Date and Time Selectors

You will also find Date and Time Selectors while using SOFTWARE.

START DATE

<

January 2023

>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
01	02	03	04	05	06	07
08	09	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	01	02	03	04
05	06	07	08	09	10	11

12:45 PM

10

35

11

40

12

45

1

50

2

55

AM

PM

Last Name

1.2.6 Open Text

You can enter open text into various non-greyed-out fields.

FIRST NAME ⓘ (Required)

Watchlist

1.2.7 Pagination

You can move through different data Pages by clicking Page numbers or arrows.

«

1

2

3

4

5

6

7

8

9

...

13

»

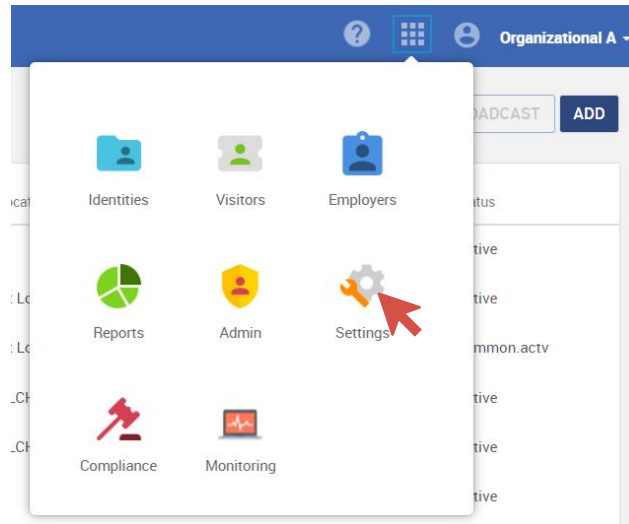
1.2.8 SAVE Button

Click the SAVE button if you make any updates or changes to SOFTWARE. This button broadcasts any modifications to the PACS system.

SAVE

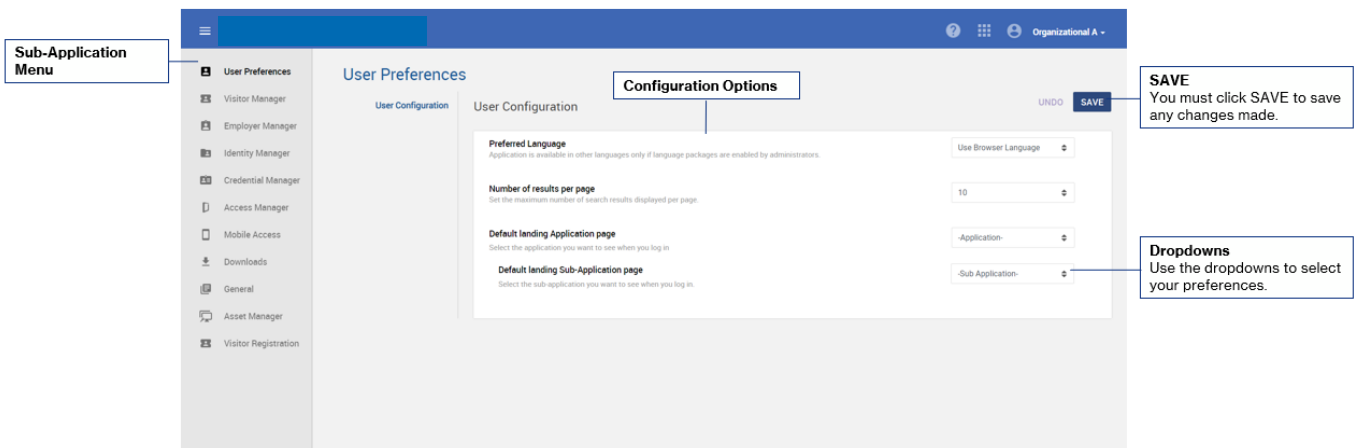
1.3 Settings Location

The Settings Application lets you turn different features on or off in SOFTWARE. To locate the Settings Application, click on the App Switcher and click Settings. Using the App Switcher is how you will access all Applications within SOFTWARE.



1.3.1 Settings Layout

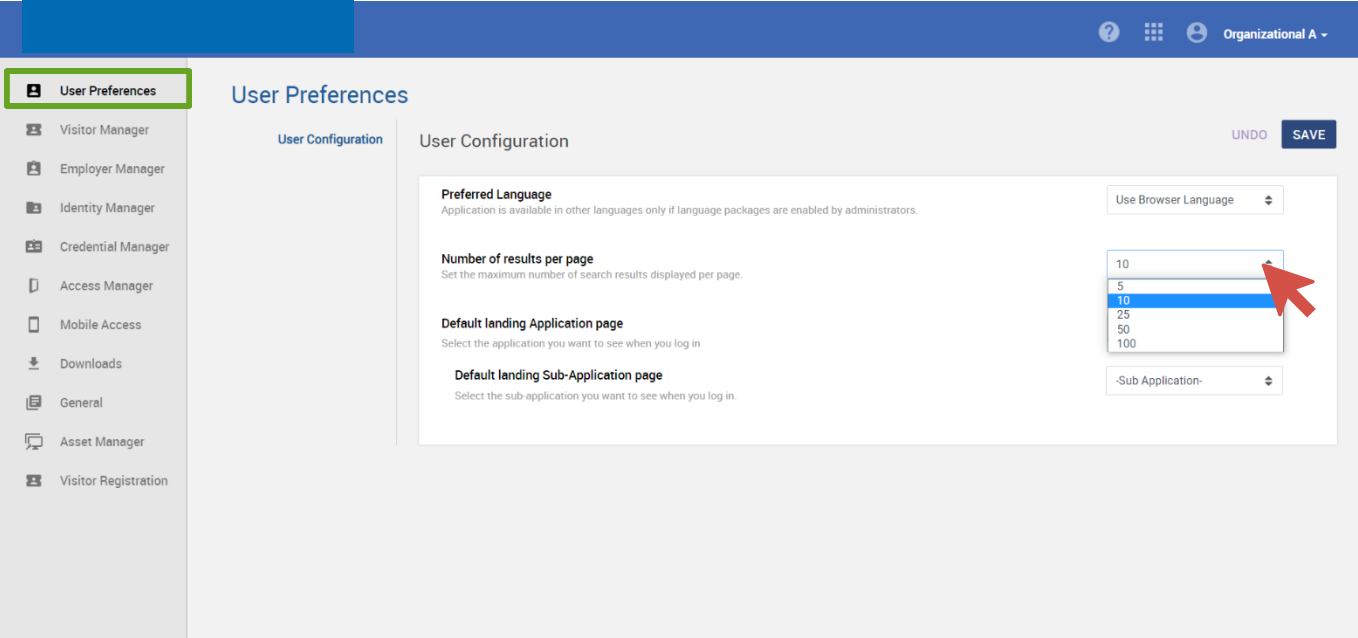
The Settings Application will default to the User Preferences Sub-Application and User Configuration Page. On this Page, we have our configuration options in the center and some control elements (drop downs and the SAVE button) on the right.



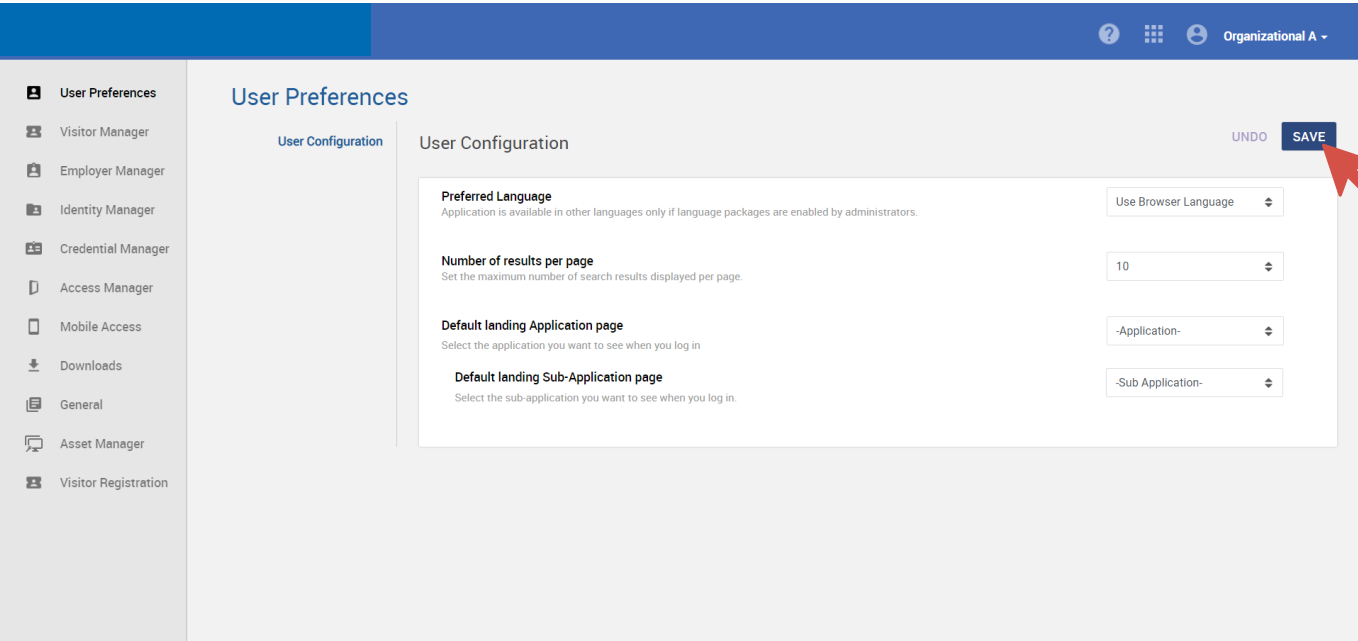
On this User configuration Page, you can select your preferred Language, choose your preference on the number of results per Page, and select your default landing Application and Sub-Application Page.

1.3.2 Updating User Preferences

To update your preferences, make your selections using the available drop-downs.

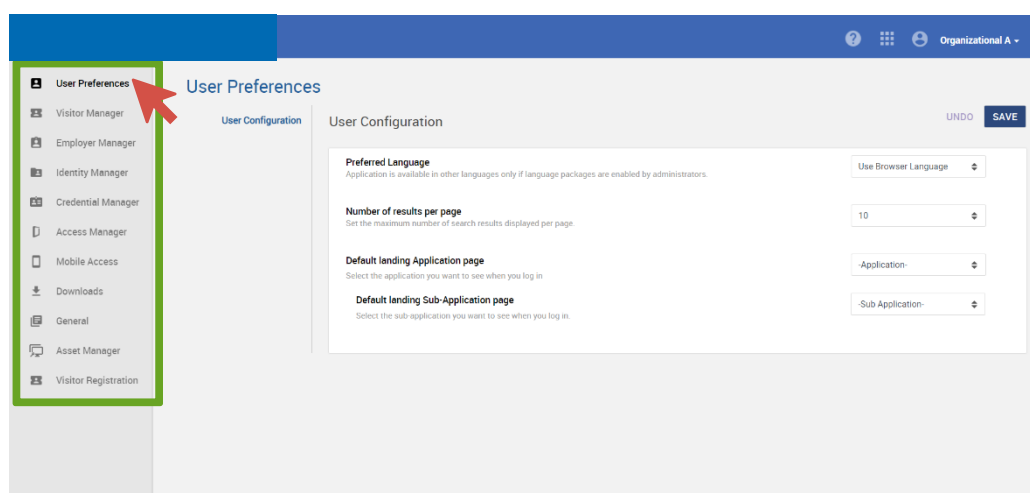


Then click SAVE to keep these changes.



1.3.3 Settings Sub-Applications

Here is an overview of the different Settings Sub-Application. Updating these settings in other Sub-Applications works the same. You simply engage with the control element and click SAVE.



Sub Application	Description
User Preferences	Configures SOFTWARE interface preferences for the User.
Visitor Manager	Configures SOFTWARE's Visitor registration and Check In process.
Employer Manager	Configures permissions for employer-specific features.
Identity Manager	Configures requirements and enables data options for capturing Identity /Personnel data.
Credential Manager	Configures card attributes, badge Applications, and card issuance process.
Access Manager	Configures workflows for Access Areas.
Mobile Access	Enable/Disable workflows for facility access using a mobile device.
Downloads	Contains SOFTWARE smart client download packages for Microsoft Products
General	Configures privacy preferences, SOFTWARE language preferences, and other organizational details used across SOFTWARE.
Asset Manager	Enable/Disable the Asset Manager to manage assets in the organization, such as Laptops, Metal Keys, Temp Cards, and other User-defined assets.
Visitor Registration	Enables the self-registration portal for visitors and configures self-registration workflow.

1.4 Admin Application



Admin

The Admin Application manages SOFTWARE configurations and access controls. The admin Application layout resembles what you have seen in the Settings Application. The Sub-Application menu is on the left, your search and filter are located at the top of the Page, you review and update data in the center of the screen, and you have action buttons that kick off workflows at the top right.

The screenshot shows the 'Users' page in the Admin Application. A callout 'Sub-Application Menu' points to the left sidebar. A callout 'Search Bar & Filter' points to the search bar at the top. A callout 'ADD/Delete Button' points to the 'DELETE' and 'ADD' buttons at the top right. A callout 'User Records' points to the table of user records. A callout 'User Pages' points to the pagination controls at the bottom of the table.

	First Name	Last Name	Login Name	Email	Status
<input type="checkbox"/>	SAFE	Policy	policy		Active
<input type="checkbox"/>	System	Administrator	Admin	admin@hedgeglobal.com	Active
<input type="checkbox"/>	Organizational	Administrator	orgadmin	orgadmin@hedgeglobal.com	Active
<input type="checkbox"/>	Visitor Reception Desk	Officer	vmo	vmo@hedgeglobal.com	Active
<input type="checkbox"/>	Visitor Management	Supervisor	vms	vms@hedgeglobal.com	Active
<input type="checkbox"/>	Visitor Management Supervisor	PVV	pvvms	pvvms@hedgeglobal.com	Active
<input type="checkbox"/>	Enrollment	Supervisor	es	es@hedgeglobal.com	Active
<input type="checkbox"/>	Asset	Manager	assetmgr	assetmgr@hedgeglobal.com	Active
<input type="checkbox"/>	Policy	Manager	pm	pm@hedgeglobal.com	Active
<input type="checkbox"/>	Analytics	Manager	am	am@hedgeglobal.com	Active

1.4.1 Master Data

Master Data, the Sub-Application, is your drop-down list builder. Anything you want to add, remove, or edit on a drop-down list within SOFTWARE can be done here.

Example of data option:

PREFIX

No Prefix

No Prefix

Mr.

Mrs.

Ms.

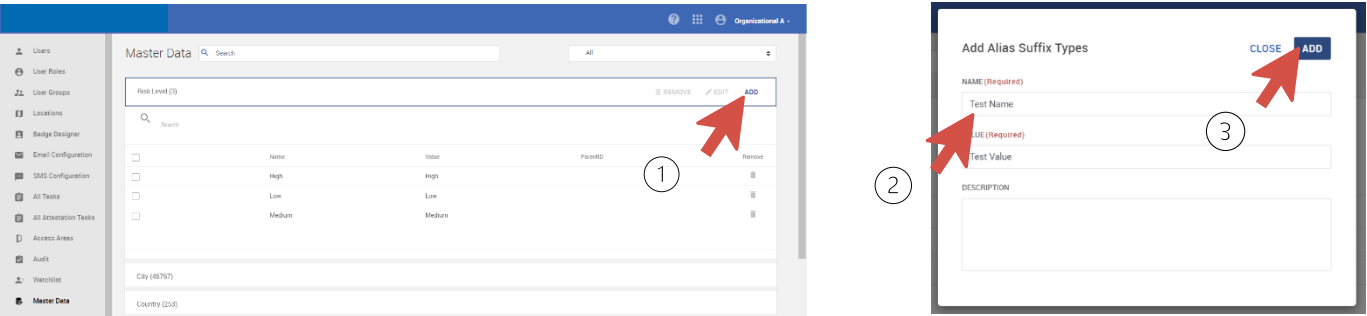
Location of Master Data within the Admin Application:

The screenshot shows the 'Master Data' page in the Admin Application. The 'Master Data' option in the left sidebar is highlighted with a green box. The main content area shows a table with columns: Name, Value, ParentID, and Remove. The table contains three rows: High, Low, and Medium. There are also search and filter controls at the top of the table.

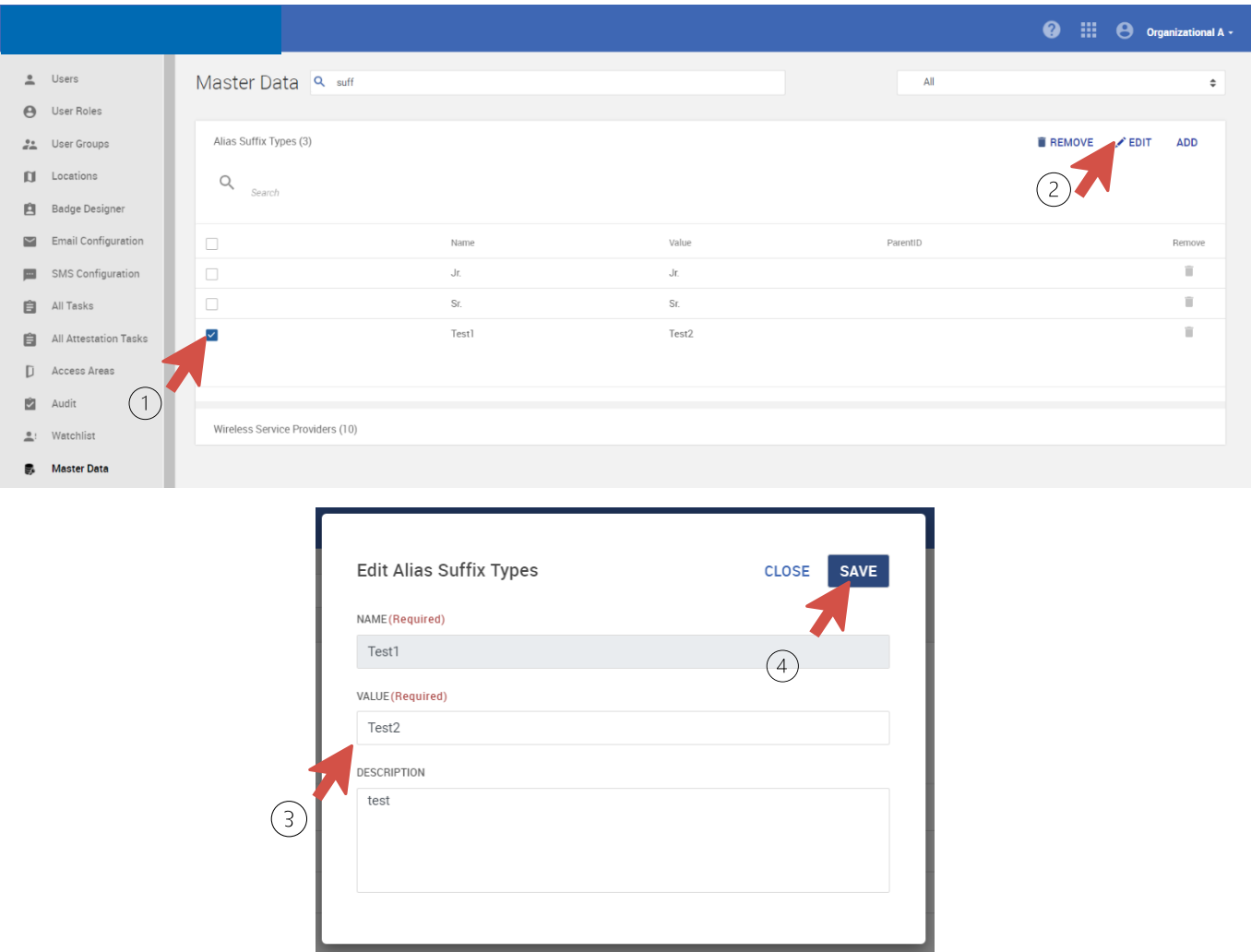
	Name	Value	ParentID	Remove
<input type="checkbox"/>	High	High		
<input type="checkbox"/>	Low	Low		
<input type="checkbox"/>	Medium	Medium		

1.4.1.1 Add/Edit/Remove Master Data

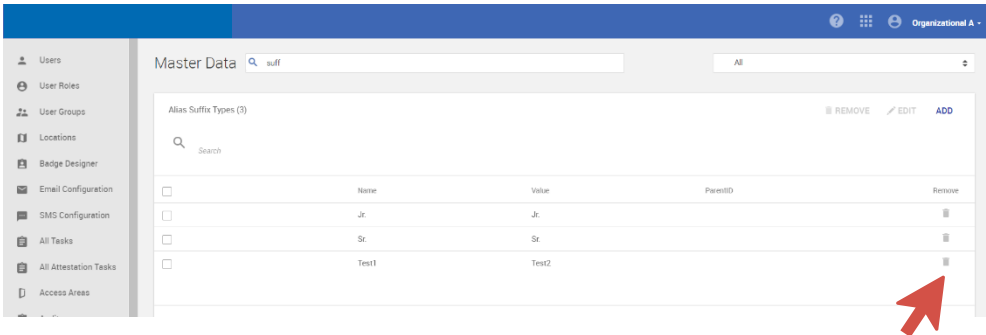
To add values to Master Data sections, locate your desired master data section and click Add. Then, enter the Name of this field. This Name will be stored in the database. After that, enter the Value—this section denotes what will appear in the drop-down fields. Next, add a description if needed; lastly, click add.



To Edit a Master Data Record, locate your desired master data section, click the selection box next to the record you want to edit, and then click Edit. This action will populate the edit window. Here, you are only allowed to update the value and the description. Once you make your updates, click SAVE.



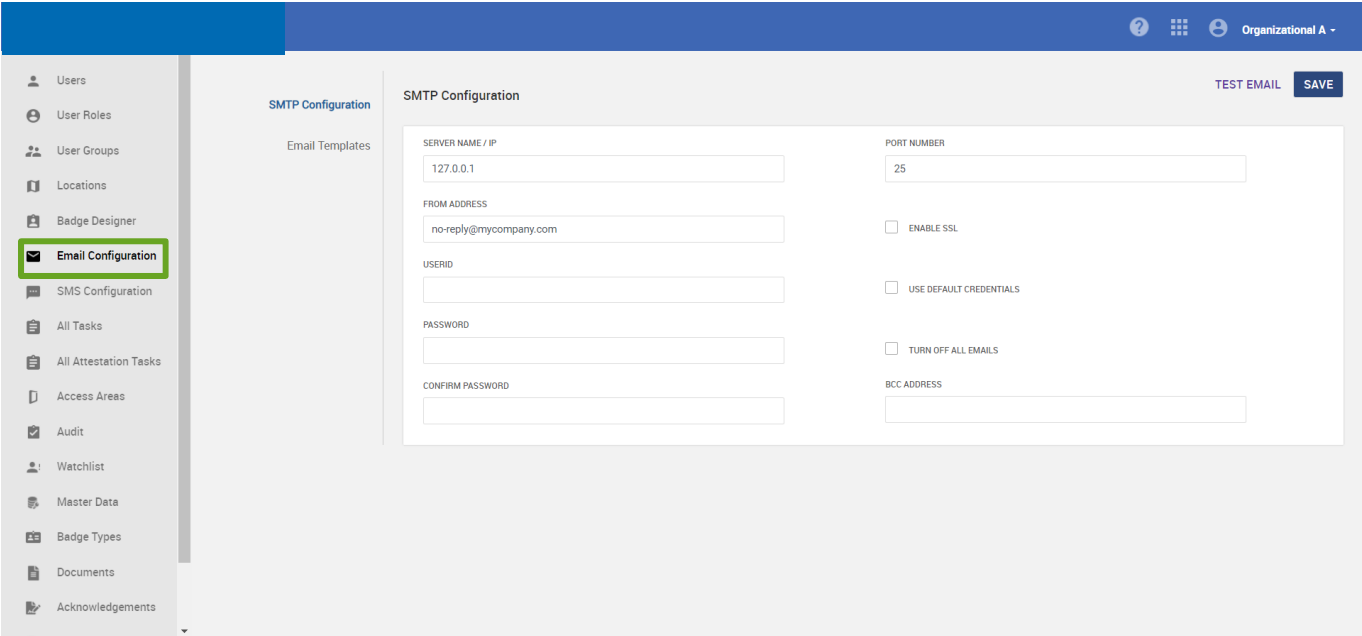
To remove a Master Data Record, locate your desired master data section and click the Remove Icon next to the record you want to Remove. Then click Yes on the confirmation window.



1.4.2 Email Configuration

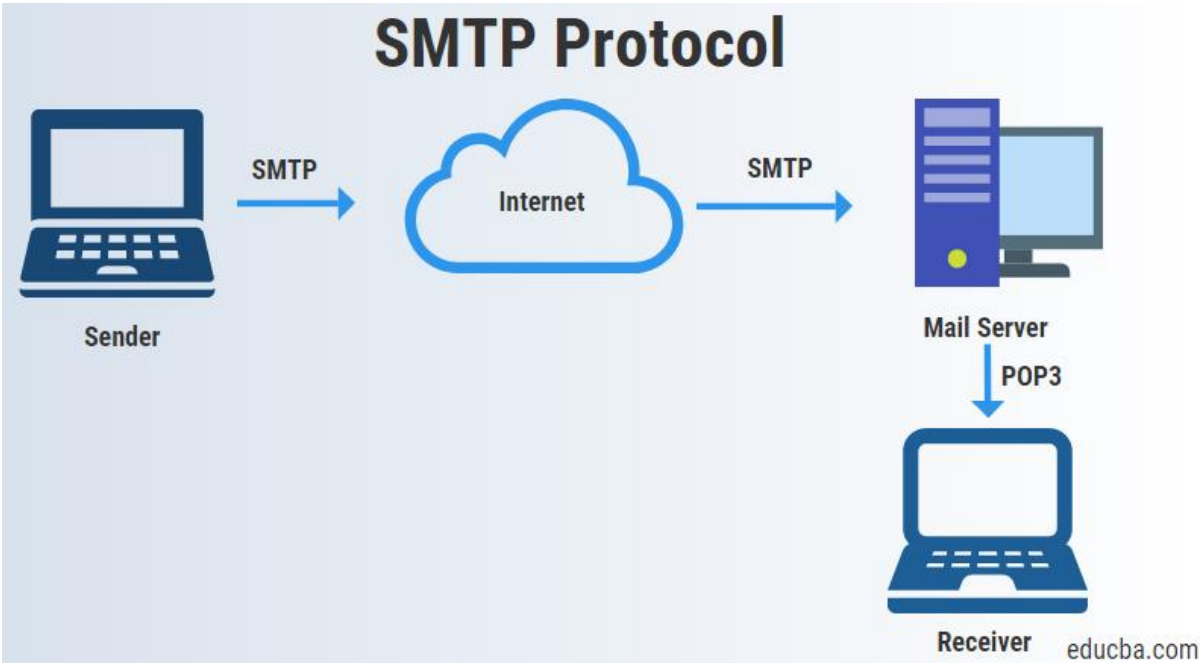
SOFTWARE supports sending emails to admin Users, employees, and visitors for various situations. Emails are typically triggered by policies and events that occur during SOFTWARE operations.

Location of Email Configuration within the Admin Application:



1.4.2.1 SMTP Configuration

Emails are sent from SOFTWARE via Simple Mail Transport Protocol (SMTP). The site must have access to an SMTP server, such as Microsoft Exchange, or a service like SMTP2GO that will send emails out on the customer's behalf.



These configurations should already be set before your deployment at your organization. However, changes do occur. On the SMTP Configurations Page, you can update your server name/IP, port number, from address, SMTP UserID, and the password for this SMTP server. Lastly, confirm the SMTP password.

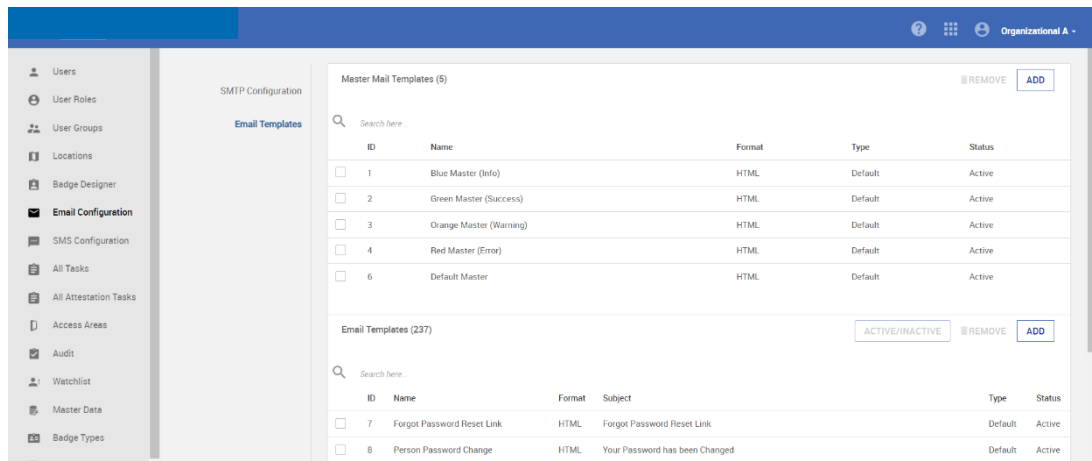
You can also enable SSL encryption; if you select this item, be sure to change the communication port accordingly. Another option available is to Use Default Credentials—choose this option, requested by the server, to authenticate using the default credentials of the currently logged-on User.

You are also given the option to turn off all emails for SOFTWARE. Lastly, you can add a Blind Carbon Copied Email Address. To edit these fields, engage with them and click SAVE.

The screenshot shows the "SMTP Configuration" page within a software interface. On the left is a sidebar menu with options: Users, User Roles, User Groups, Locations, Badge Designer, Email Configuration (highlighted), SMS Configuration, All Tasks, All Attestation Tasks, Access Areas, and Audit. The main content area is titled "SMTP Configuration" and contains several input fields: "SERVER NAME / IP" (with value "127.0.0.1"), "FROM ADDRESS" (with value "no-reply@mycompany.com"), "USERID", "PASSWORD", and "CONFIRM PASSWORD". On the right side of the form are "PORT NUMBER" (with value "25"), checkboxes for "ENABLE SSL", "USE DEFAULT CREDENTIALS", and "TURN OFF ALL EMAILS", and a "BCC ADDRESS" field. At the top right of the form are "TEST EMAIL" and "SAVE" buttons. Red arrows and circled numbers highlight specific elements: a red arrow points to the "FROM ADDRESS" field (labeled with a circled 1), and another red arrow points to the "SAVE" button (labeled with a circled 2).

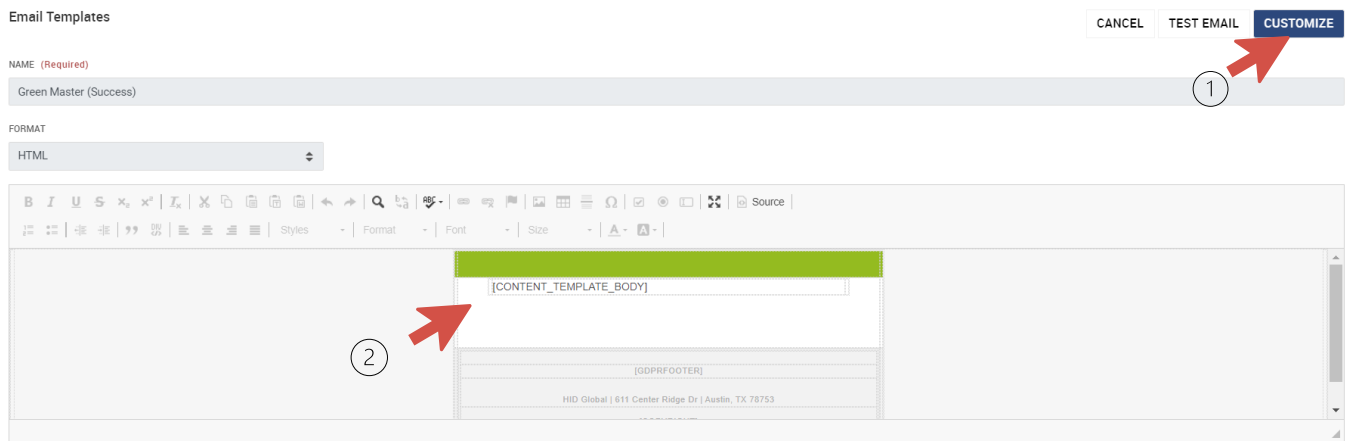
1.4.2.2 Email Templates

The Email Templates Page is divided into two sections— Master Mail Templates and Email Templates. Master Mail Templates are the look and feel (aka Layout) applied to the emails sent. Email Templates are the distinct email copy that will be sent out from SOFTWARE.



1.4.2.3 View/Customize/Test Master Mail Templates

To view and edit the Master Mail Template, click on the target template. To customize the Master Mail Template, click Customize, make your updates, and click SAVE.



To test these templates, click the Test Email button, enter your email address, and click Send.

Email Templates

CANCEL TEST EMAIL CUSTOMIZE

NAME (Required)

Green Master (Success)

FORMAT

HTML

[CONTENT_TEMPLATE_BODY]

[GDPRFOOTER]

HID Global | 611 Center Ridge Dr | Austin, TX 78753

1

PLEASE ENTER YOUR EMAIL

EMAIL ID (Required)

2

3

CLOSE SEND

1.2.4.4 View/Customize/Test/Restore Default/Add Email Templates

To view and edit the Email Template, click on the target template. To customize the Email Template, click Customize (or Edit if you are working with a modified template). You will see the option to Update the Template Name, the Format (HTML/Text), the Master Layout (Info/Success/Warning/Error), the Status of this template (active/inactive), and its Priority. You can enable multi-language Support, which allows SOFTWARE to translate the email to your Personnel's preferred language or translate the text to match the visit location. And lastly, you can update the Subject and Body of this email. Email templates can be customized as far as the static text appears. Other information is typically obtained by database queries, stored procedures, or other functions and is usually modified by Professional Services. Once you have made your updates, click SAVE.

Email Templates

CANCEL VIEW DEFAULT TEST EMAIL EDIT

NAME (Required)

Forgot Password Reset Link

FORMAT MASTER LAYOUT STATUS PRIORITY

HTML Default Master Active Normal

ENABLE MULTI-LANGUAGE SUPPORT

SEND EMAIL IN OTHER LANGUAGES BASED ON PERSONNEL LANGUAGE PREFERENCE SELECT LANGUAGE

SUBJECT

Forgot Password Reset Link

LINK TO RESET PASSWORD

Please click the below link to reset your password:

Reset Link

Best regards,
Security Team

To test these templates, click the Test Email button, enter your email address, and click Send.

Email Templates

CANCEL VIEW DEFAULT TEST EMAIL EDIT

NAME (Required)

Forgot Password Reset Link

FORMAT MASTER LAYOUT STATUS PRIORITY

HTML Default Master Active Normal

ENABLE MULTI-LANGUAGE SUPPORT

SEND EMAIL IN OTHER LANGUAGES BASED ON PERSONNEL LANGUAGE PREFERENCE SELECT LANGUAGE

SUBJECT

Forgot Password Reset Link

LINK TO RESET PASSWORD

Please click the below link to reset your password:

Reset Link

Best regards,
Security Team

Please enter your email

EMAIL ID (Required)

CLOSE SEND

To Restore a template to its original state, click View Default, click Restore Default, then click Yes on the confirmation window.

The screenshot shows the 'Email Templates' configuration interface. At the top right, there are buttons for 'CANCEL', 'VIEW DEFAULT', 'TEST EMAIL', and 'EDIT'. A red arrow points to the 'VIEW DEFAULT' button, which is also circled with a '1'. Below the buttons, the template details are shown: NAME (Required) is 'Forgot Password Reset Link', FORMAT is 'HTML', MASTER LAYOUT is 'Default Master', STATUS is 'Active', and PRIORITY is 'Normal'. There is a checkbox for 'ENABLE MULTI-LANGUAGE SUPPORT' and a section for 'SEND EMAIL IN OTHER LANGUAGES BASED ON' with a dropdown for 'Personnel Language Preference' and a 'SELECT LANGUAGE' dropdown. The SUBJECT is 'Forgot Password Reset Link'. The main content area shows a preview of the email template with a blue header, a link to reset the password, and a signature from the Security Team.

The screenshot shows the 'Email Templates' configuration interface. At the top right, there are buttons for 'CANCEL', 'VIEW CUSTOM', and 'RESTORE DEFAULT'. A red arrow points to the 'RESTORE DEFAULT' button, which is also circled with a '2'. The template details are the same as in the previous screenshot: NAME (Required) is 'Forgot Password Reset Link', FORMAT is 'HTML', MASTER LAYOUT is 'Default Master', STATUS is 'Active', and PRIORITY is 'Normal'. The 'ENABLE MULTI-LANGUAGE SUPPORT' checkbox is now unchecked. The SUBJECT is 'Forgot Password Reset Link'. The main content area shows the same email template preview.

The screenshot shows a confirmation dialog titled 'Restore Default'. The text inside the dialog says: 'All the customization done to this template will be lost. Do you want to continue?'. At the bottom right, there are two buttons: 'NO' and 'YES'. A red arrow points to the 'YES' button, which is also circled with a '3'.

To Add an email, click Add, fill out the Email template to your desired specifications, and Click SAVE.

Email Templates

CANCELTEST EMAILSAVE

NAME (Required)

Test

FORMATHTML

MASTER LAYOUT

STATUSActive

PRIORITYNormal

☐ ENABLE MULTI-LANGUAGE SUPPORT

SUBJECT

B I U S x² Ix X Copy Paste Undo Redo Bold Italic Link Unlink List Bulleted Numbered Indent Outdent Styles Font Size Color Background Color Source

body

Note: Editing email content or styles can change its look and feel in various email clients. Please test the changes using "TEST EMAIL" feature to test it in the Client/Browser/OS of your choice.

SOFTWARE supports SMS (Short Message Service) to notify hosts that their visitor has checked in at the VMO desk or a kiosk. This feature must be enabled through the Visitor Management Sub-Application within the Settings Application.

If the company chooses not to use its telecom SMS service or is out of the country, it can use an SMS gateway provider. SOFTWARE supports Twilio for these services. <http://www.twilio.com>.

1.4.3.1 Update SMS Gateway

To enable the SMS Gateway, click on Enable SMS Gateway Provider Method. Select Twilio as the service provider name and enter your Twilio account SID (which is your Security Identifier for your account—i.e., Your Username), then enter the Authentication Token (this acts as the Password). After that, enter the Twilio From Number used to send the SMS. Lastly, click SAVE.

The screenshot shows the HID SAFE Admin interface. On the left, the 'SMS Configuration' menu item is highlighted with a green box. The main content area is titled 'SMS Configuration'. It features a section 'Enable SMS Gateway Provider method' with a checked checkbox. Below this, there are four input fields: 'SERVICE PROVIDER NAME' (set to 'Twilio'), 'TWILIO ACCOUNT SID' (3245568), 'TWILIO AUTH TOKEN' (1234), and 'TWILIO FROM NUMBER' (+1 201-555-0123). In the top right corner, there are 'TEST SMS' and 'SAVE' buttons. Red arrows and numbered circles indicate the steps: (1) points to the 'TEST SMS' button, (2) points to the 'Twilio' dropdown, and (3) points to the 'SAVE' button.

1.4.3.2 Test SMS Configuration

To test your SMS Configuration, click Test SMS. This button will populate the Test SMS window. You will need to enter your Phone Number, the Subject of your text message, and your message within the SMS Body. Once you have filled out the fields, click Send.

The screenshot shows the HID SAFE Admin interface. On the left, the 'SMS Configuration' menu item is highlighted with a green box. The main content area is titled 'SMS Configuration'. It features a section 'Enable SMS Gateway Provider method' with an unchecked checkbox. Below this, there is a 'Select Provider' dropdown menu. In the top right corner, there are 'TEST SMS' and 'SAVE' buttons. A red arrow and numbered circle (1) point to the 'TEST SMS' button.

The screenshot shows the 'Test SMS' window. It has three input fields: 'PHONE NUMBER (Required)' with the value '+1 555-555-5555', 'SUBJECT (Required)' with the value 'Test', and 'SMS BODY (Required)' with the value 'Test'. In the top right corner, there are 'CLOSE' and 'SEND' buttons. Red arrows and numbered circles indicate the steps: (2) points to the 'PHONE NUMBER' field, and (3) points to the 'SEND' button.

1.4.3.3 View/Edit/Add/Remove SMS Templates

To view the SMS Template, click on the desired template. This action will populate the SMS Template Edit window. Here, you can see the Template Name, the Status of this template (Active/Inactive), the Priority of this template (low/normal/high), its Subject, and the Message.

Like Emails, the SMS Body contains information from database queries. It is advised that these queries should remain untouched.

To edit these fields, update your desired fields and click SAVE.

≡

HID SAFE™ | Admin

?

⌵

Organizational A ▾

Users

User Roles

User Groups

Locations

Badge Designer

Email Configuration

SMS Configuration

SMS Configuration

SMS Templates

SMS Templates

REMOVE

ADD

Search here...

Template Id	Name	Description	Status
232	Notify Escort On Visitor On Site Via Gateway SMS	Your Visitor(s) are On Site at [Query.1] [Query.5] [Query.11]	Inactive
233	Notify Host On Visitor Check Out Via Gateway SMS	Your Visitor(s) have Checked Out at [Meeting Location] [Meeting Building]	Active
234	Notify Host On Visitor Check In Via Gateway SMS	Your Visitor(s) have been Checked In at [Meeting Location] [Meeting Building]	Active
240	Notify Host On Visitor On Site Via Gateway SMS	Your Visitor(s) are On Site at [Query.1] [Query.5] [Query.11]	Active

SMS Template

CANCEL

SAVE

SMS TEMPLATE NAME (Required)

Notify Escort On Visitor On Site Via Gateway SMS

STATUS (Required)

Inactive

PRIORITY (Required)

High

SUBJECT (Required)

Your Visitor(s) are On Site at [Query.1] [Query.5] [Query.11]

SMS BODY (Required)

[Query.2], your visitor(s) ([Query.4]) have checked into our Reception Center for their [Query.3] visit and are on their way to [Query.1] [Query.5] [Query.11].

To add an SMS Template, click Add, fill out the SMS Template details, and click SAVE.

The screenshot shows the 'SMS Templates' management interface. On the left is a sidebar with navigation options: Users, User Roles, User Groups, Locations, Badge Designer, Email Configuration, and SMS Configuration. The main area displays a table of existing templates. A red arrow labeled '1' points to the 'ADD' button in the top right corner. Below the table, a modal form titled 'SMS Template' is shown. A red arrow labeled '2' points to the 'SMS TEMPLATE NAME (Required)' field, which contains the text 'Test'. Another red arrow labeled '3' points to the 'SAVE' button in the top right of the modal. The modal also includes fields for 'STATUS (Required)' (set to 'Active'), 'PRIORITY (Required)' (set to 'admin.template.priorities.normal'), 'SUBJECT (Required)' (set to 'Test'), and 'SMS BODY (Required)' (set to 'Test').

Template Id	Name	Description	Status
232	Notify Escort On Visitor On Site Via Gateway SMS	Your Visitor(s) are On Site at [Query:1] [Query:5] [Query:11]	Inactive
233	Notify Host On Visitor Check Out Via Gateway SMS	Your Visitor(s) have Checked Out at [Meeting.Location] [Meeting.Building]	Inactive
234	Notify Host On Visitor Check In Via Gateway SMS	Your Visitor(s) have been Checked In at [Meeting.Location] [Meeting.Building]	Inactive

Like with Email. Users assigned to the User Group Policy Managers can assign these SMS messages to workflows.

To remove an SMS Template, click the selection box next to the template you want to remove and click Remove.

The screenshot shows the 'SMS Templates' management interface. A red arrow labeled '1' points to the selection checkbox next to the first template in the table. Another red arrow labeled '2' points to the 'REMOVE' button in the top right corner. The table lists several templates, including those with IDs 232, 233, 234, 240, and 246.

Template Id	Name	Description	Status
<input checked="" type="checkbox"/> 232	Notify Escort On Visitor On Site Via Gateway SMS	Your Visitor(s) are On Site at [Query:1] [Query:5] [Query:11]	Inactive
<input type="checkbox"/> 233	Notify Host On Visitor Check Out Via Gateway SMS	Your Visitor(s) have Checked Out at [Meeting.Location] [Meeting.Building]	Inactive
<input type="checkbox"/> 234	Notify Host On Visitor Check In Via Gateway SMS	Your Visitor(s) have been Checked In at [Meeting.Location] [Meeting.Building]	Inactive
<input type="checkbox"/> 240	Notify Host On Visitor On Site Via Gateway SMS	Your Visitor(s) are On Site at [Query:1] [Query:5] [Query:11]	Inactive
<input type="checkbox"/> 246	Notify Visitor On Checked In Via Gateway SMS	Meeting WIFI details	Inactive