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	HID SAFE™	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
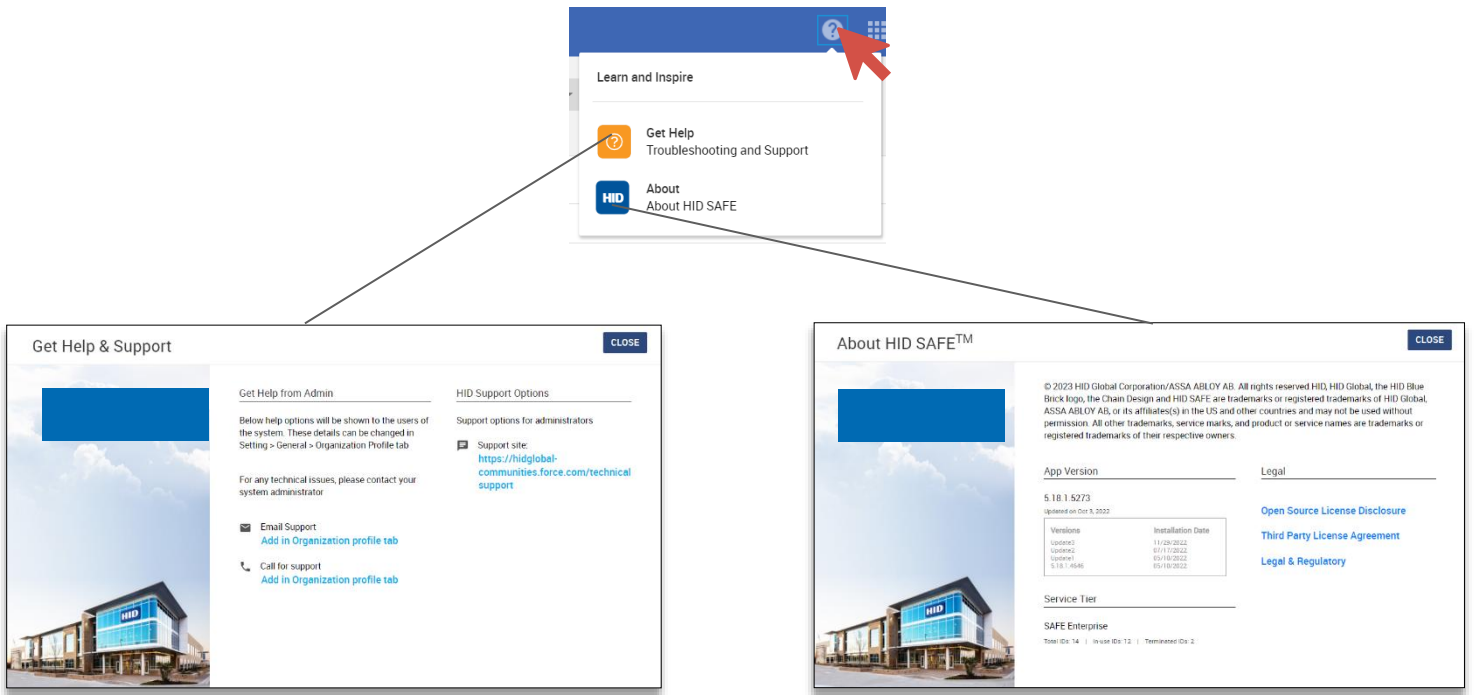
1.1.4 App Switcher

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.
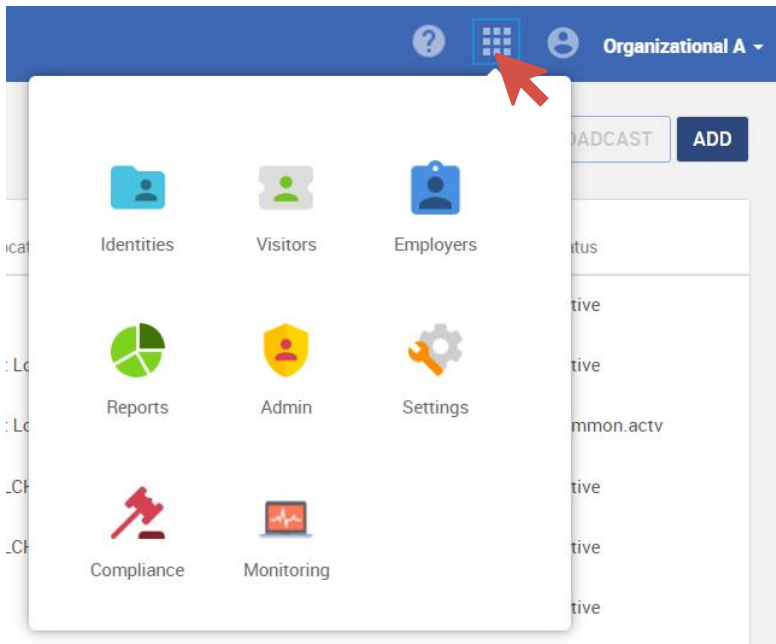
| Application	Icon	Application Function
Identities		Manages all Employee information.
Visitors		Manages the visitor Check In, Check Out, and badging processes.
Employers		Manages employers that also utilize a shared working space.
Reports		Manages reporting and reporting dashboards for SOFTWARE Data.
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.
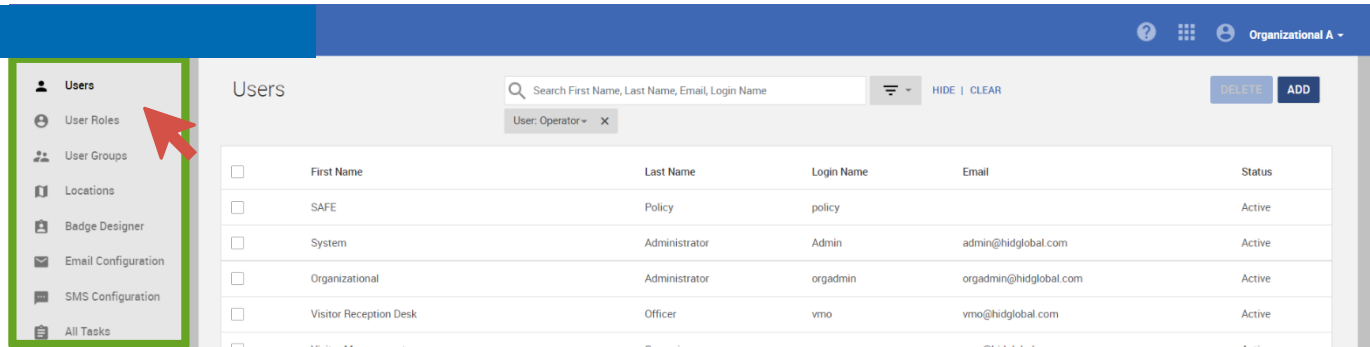
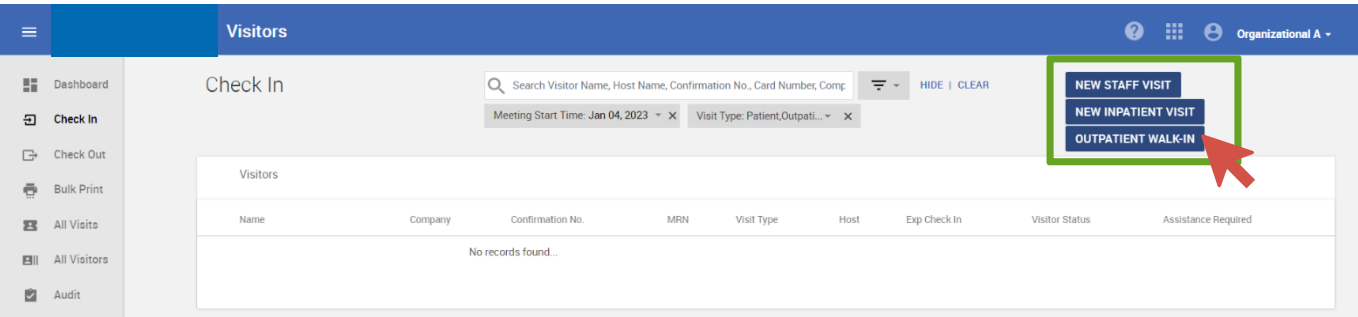

1.2   Control Elements

Control elements are what you use to interact with the SOFTWARE interface. They include things like selection boxes and drop-downs.
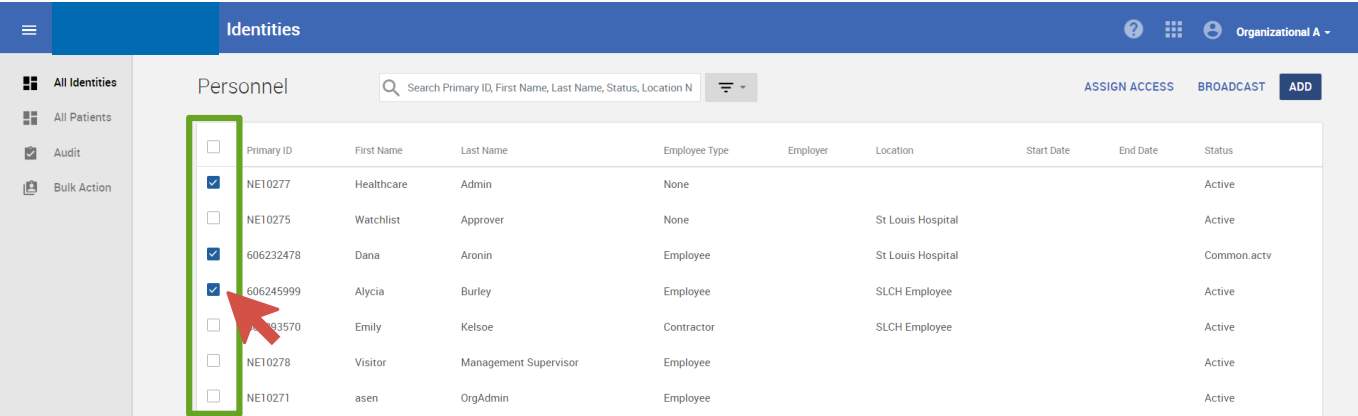
1.2.1 Search & Filter
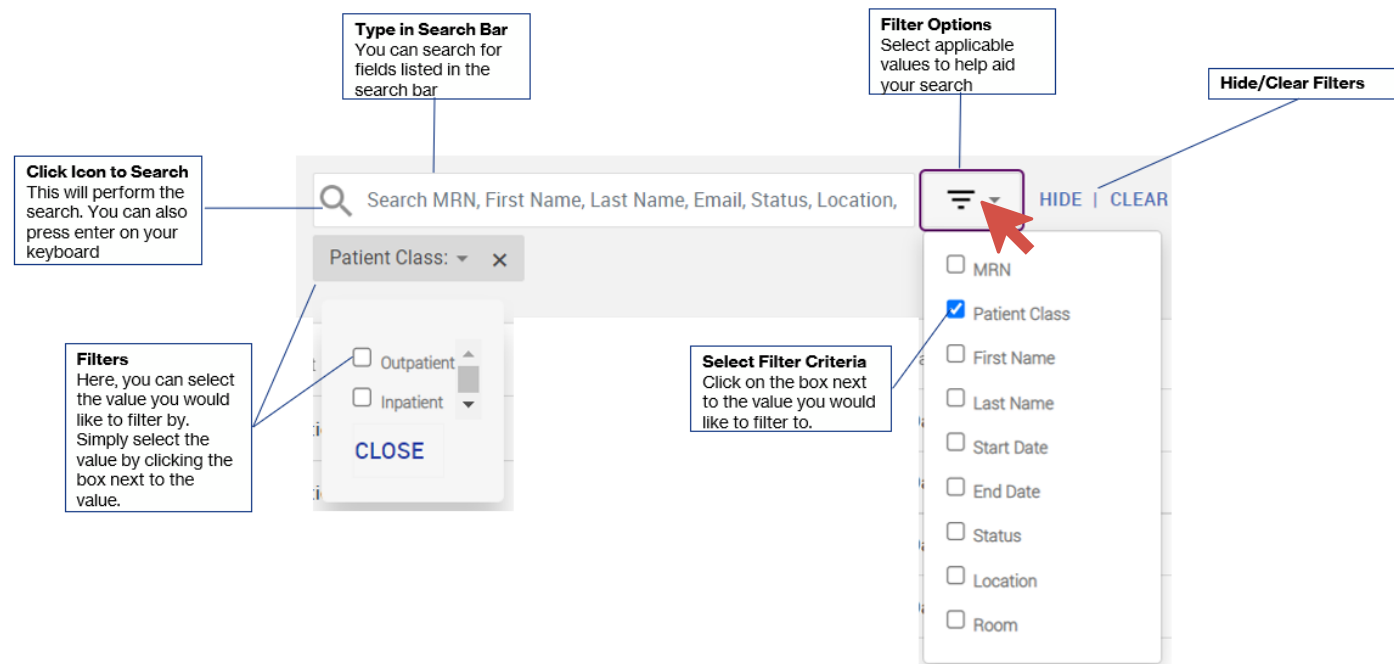
1.2.2 Action Buttons

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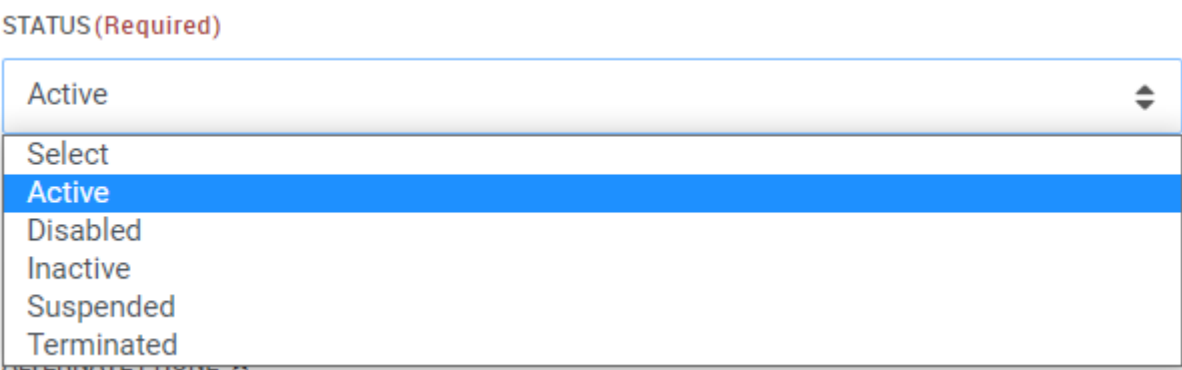

1.2.3 Selection Box

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

END TIME (Required)

12:45 PM

^	^	
10	35	
11	40	AM
12	45	PM
1	50	
2	55	
v	v	

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.
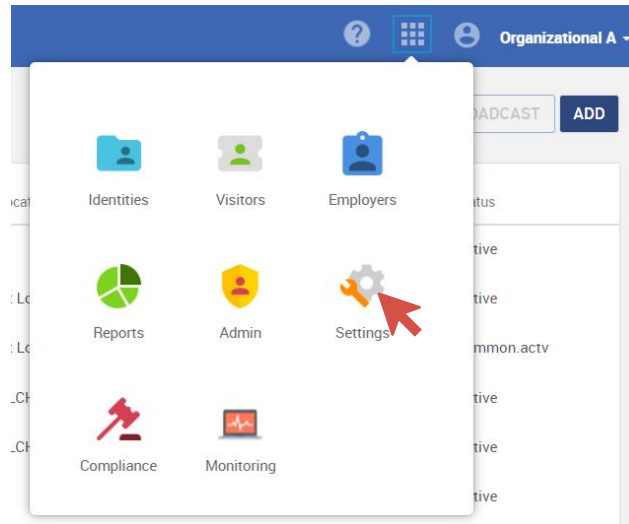

1.3.1 Settings Layout

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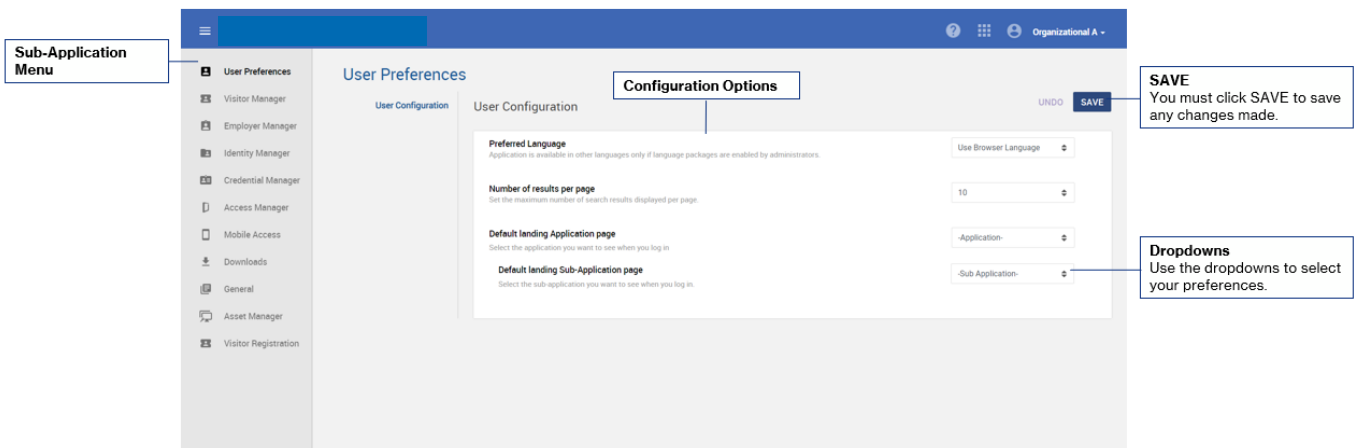
On this User configuration Page, you can select your preferred Language, choose your preference on the number of results per Page, and select your default landing Application and Sub-Application Page.

1.3.2 Updating User Preferences

To update your preferences, make your selections using the available drop-downs.
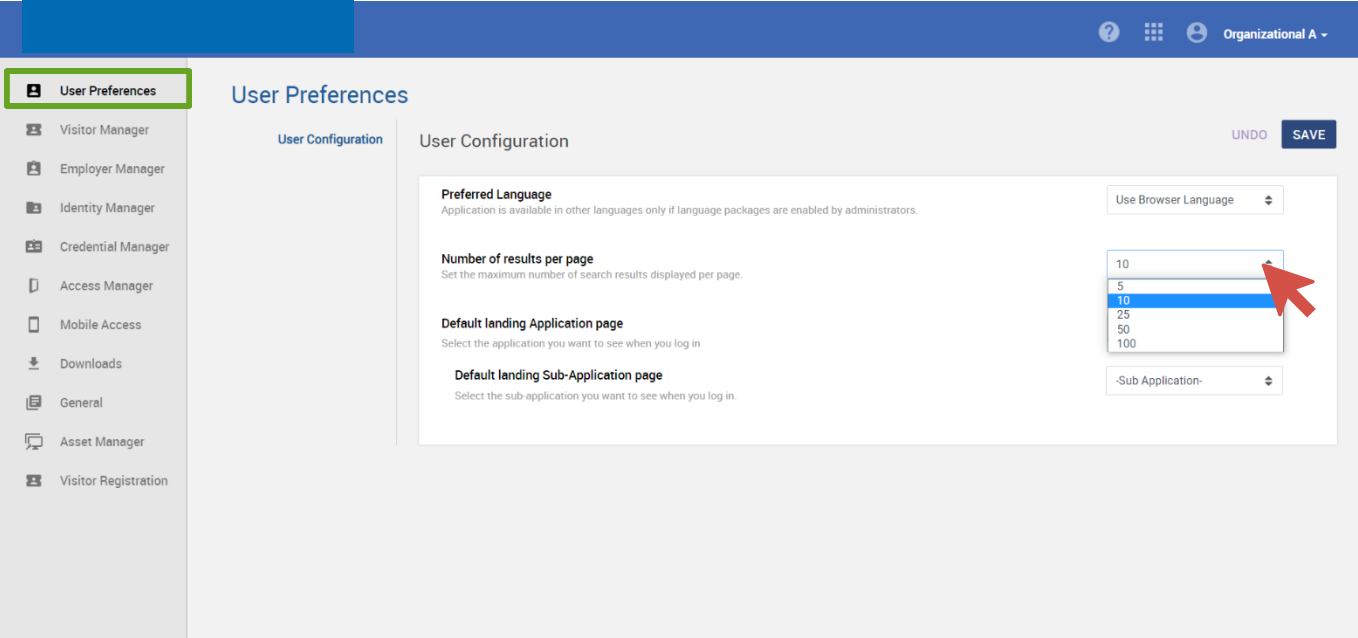
Then click SAVE to keep these changes.
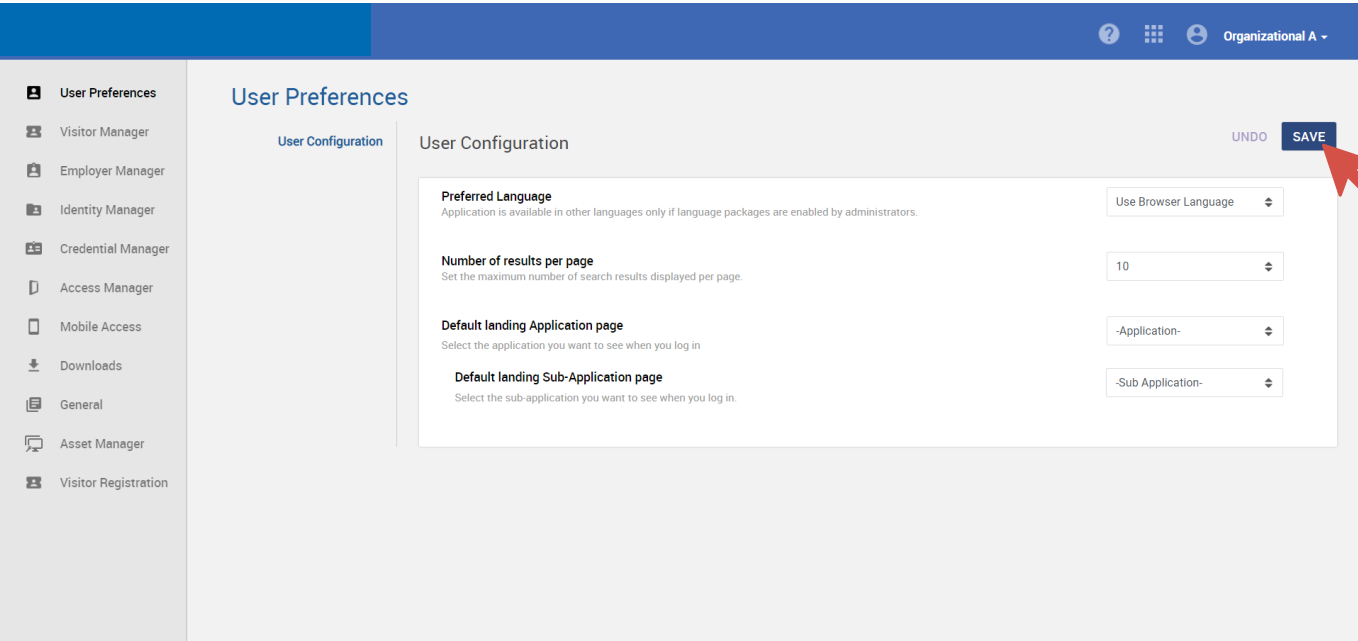
1.3.3 Settings Sub-Applications

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.
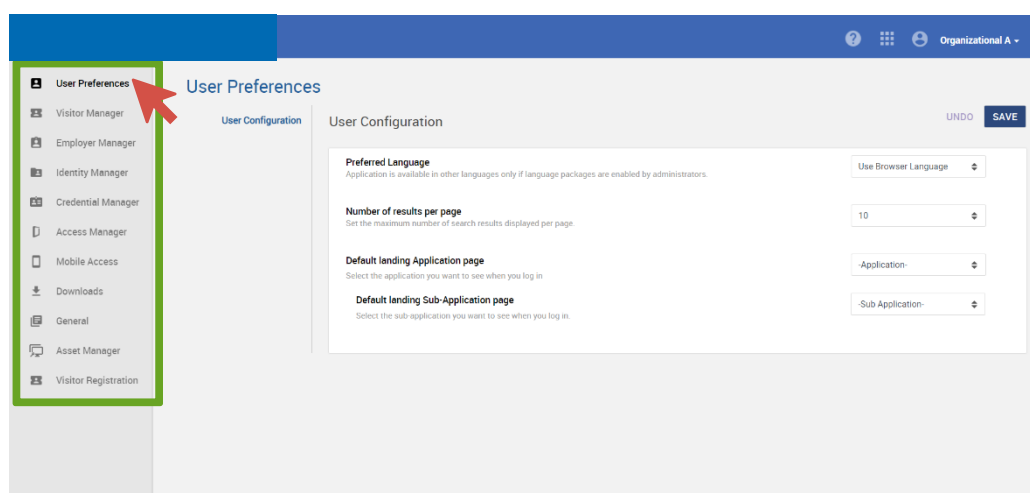
Sub Application	Description
User Preferences	Configures SOFTWARE interface preferences for the User.
Visitor Manager	Configures SOFTWARE's Visitor registration and Check In process.
Employer Manager	Configures permissions for employer-specific features.
Identity Manager	Configures requirements and enables 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

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.

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:

Location of Master Data within the Admin Application:

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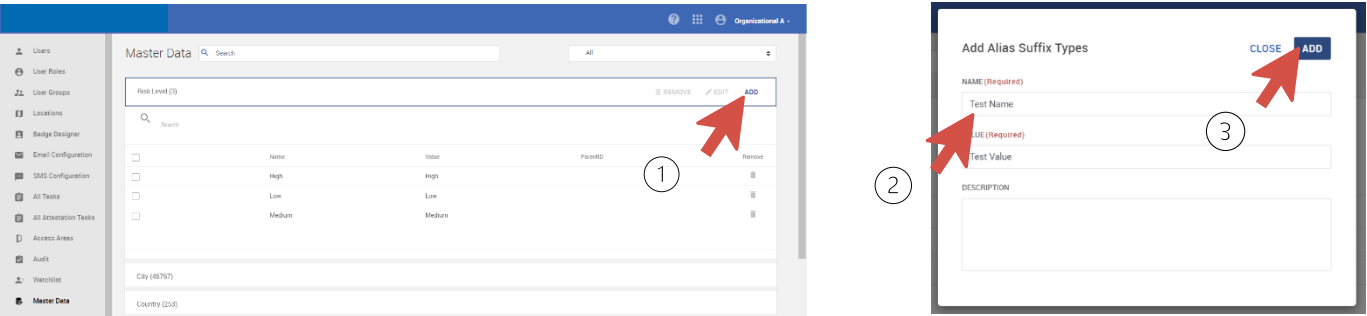
To Edit a Master Data Record, locate your desired master data section, click the selection box next to the record you want to edit, and then click Edit. This action will populate the edit window. Here, you are only allowed to update the value and the description. Once you make your updates, click SAVE.
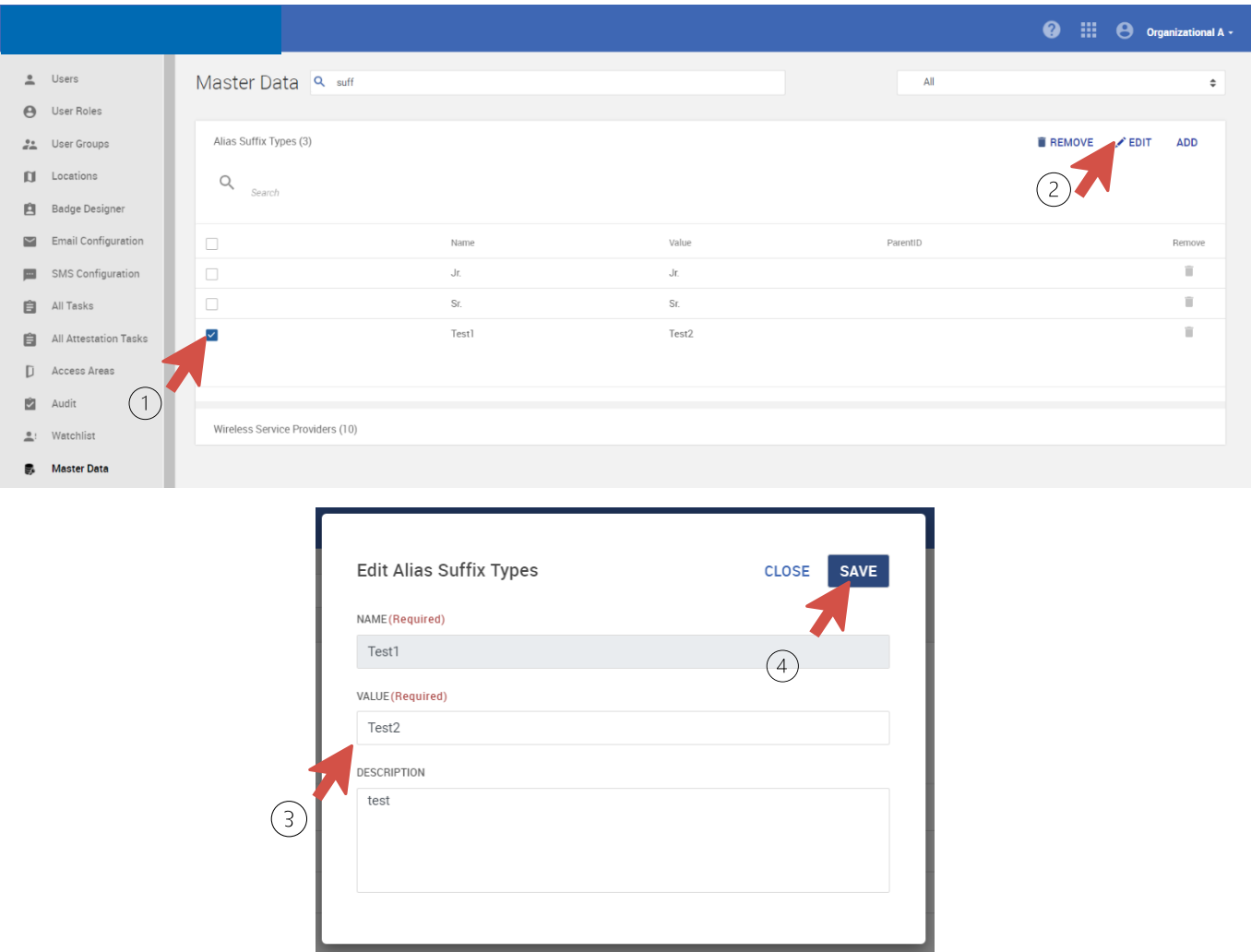
To remove a Master Data Record, locate your desired master data section and click the Remove Icon next to the record you want to Remove. Then click Yes on the confirmation window.
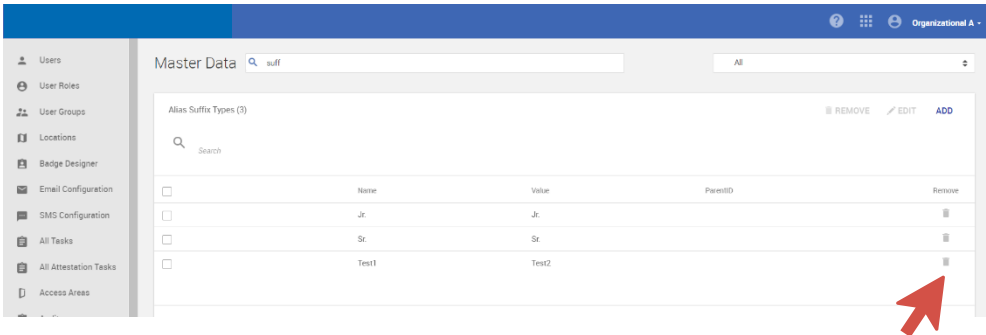
1.4.2 Email Configuration

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:
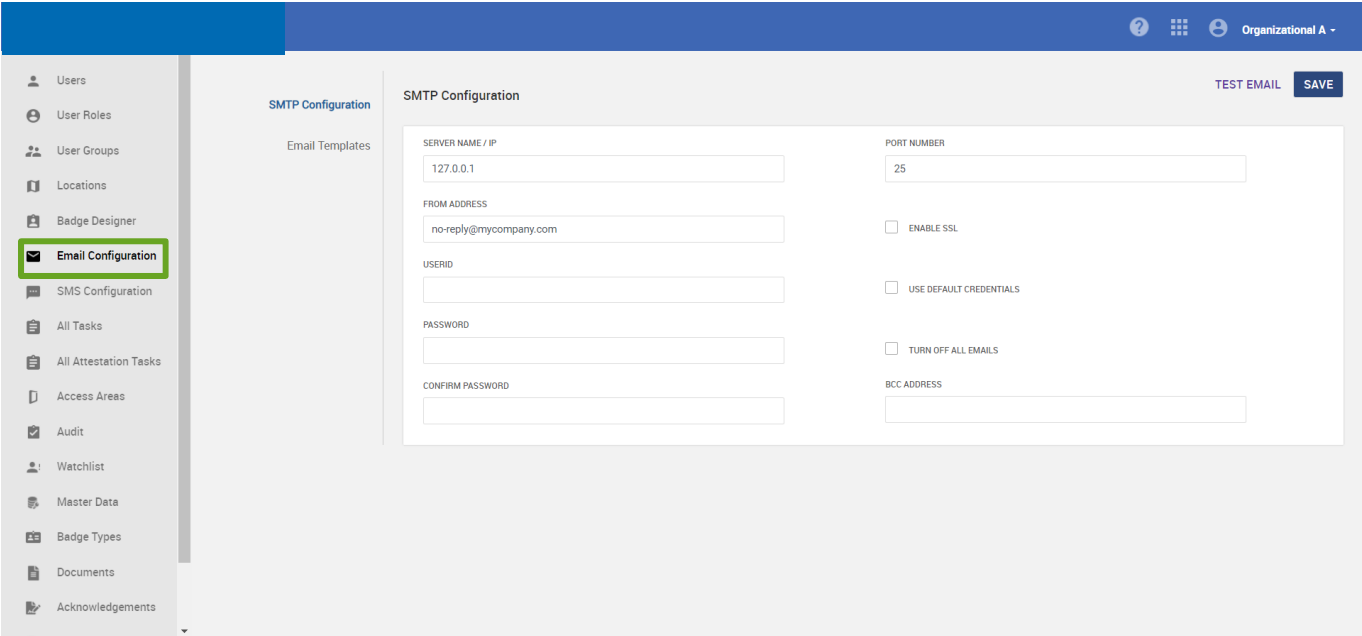
1.4.2.1   SMTP Configuration

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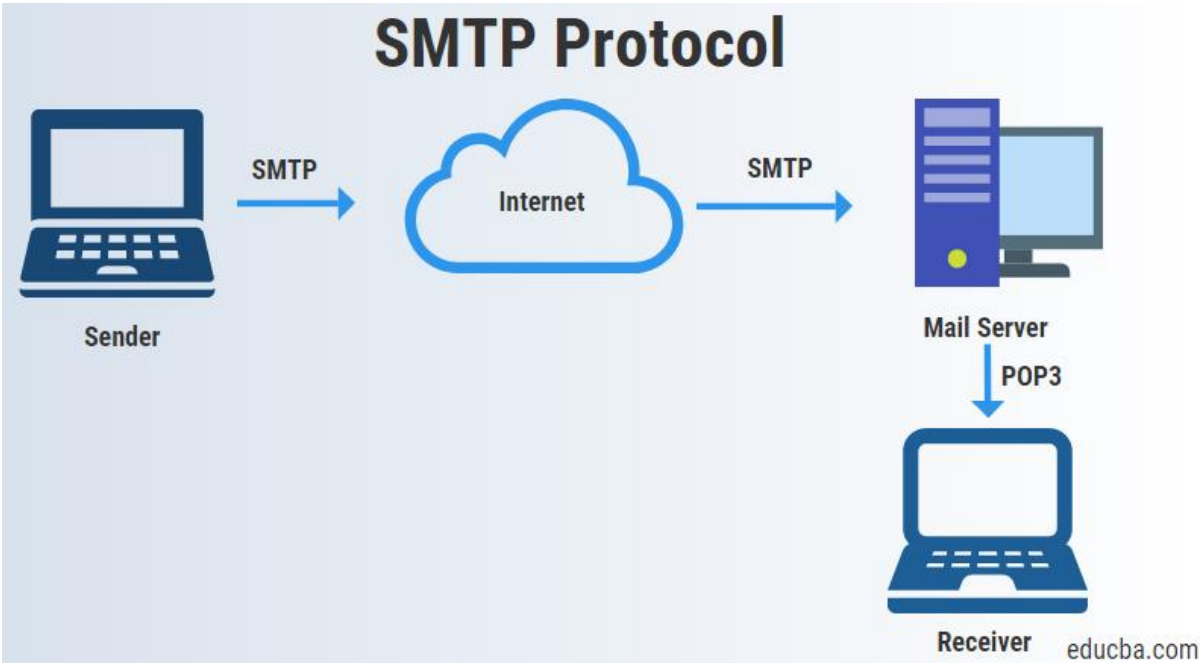
These configurations should already be set before your deployment at your organization. However, changes do occur. On the SMTP Configurations Page, you can update your server name/IP, port number, from address, SMTP UserID, and the password for this SMTP server. Lastly, confirm the SMTP password.

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.

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.
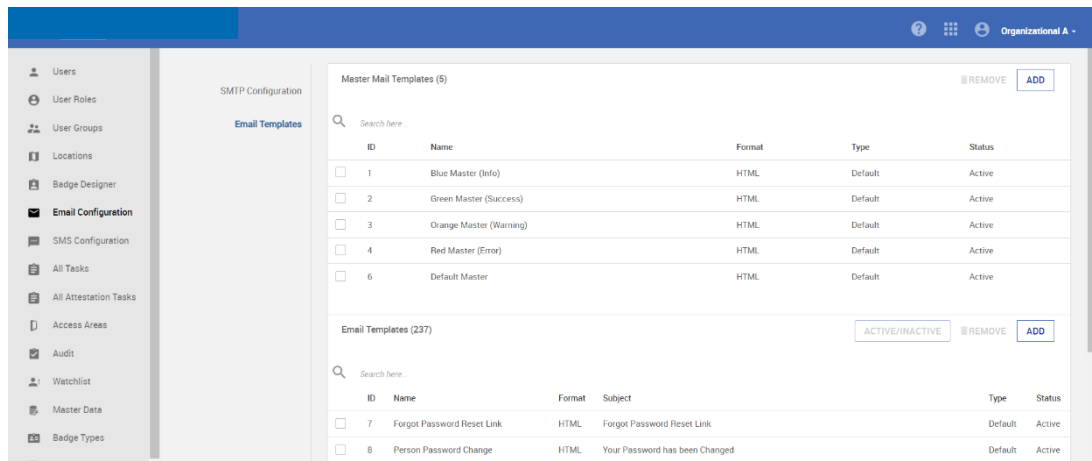
1.4.2.3   View/Customize/Test Master Mail Templates

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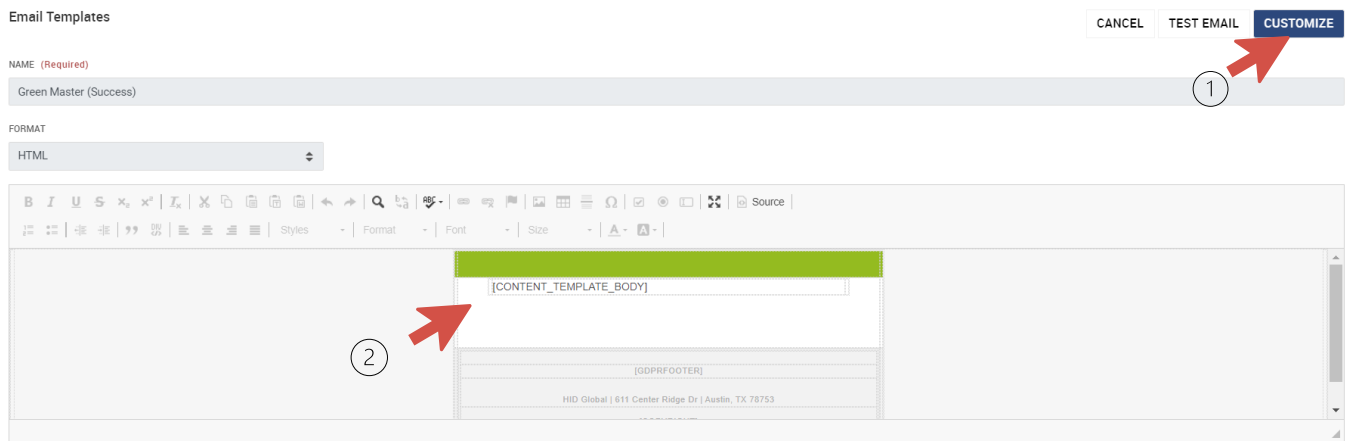
To test these templates, click the Test Email button, enter your email address, and click Send.

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.

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

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

You can create your own Email Templates if needed. However, only Users assigned to the User Group Policy Managers can assign these emails to workflows.

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

	ID	Name	Format	Subject		Type	Status
	7	Forgot Password Reset Link	HTML	Forgot Password Reset Link		Default	Active
	8	Person Password Change	HTML	Your Password has been Changed		Default	Active
	9	Forgot Password Questionnaire Alert	HTML	Password Reset Link Could Not Be Sent		Default	Active
	10	Password Change	HTML	Your Password Has Been Changed		Default	Active

1.4.3 SMS Configuration

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.

Usually, US-based telecom companies support SMS messages through an email address (like the following: 555-555-5555@vtext.com for Verizon).

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.

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.

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.

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

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.