

### **Introduction to Open Access:**

# Live-Scheduling Application for Area Access Managers

# Open Access allows you to manage the automated unlocking schedules of your doors.

The Open Access: Live Control & Scheduling app is a web application that allows Area Access Managers additional functions over the access of spaces controlled by electronic access. The access to the various spaces you can work with is specific to the areas you are assigned to manage within the OnGuard, Area Access Manager program.

This new tool, developed specifically for WSU, allows you to:

- Check the status of and override the status of a door from your computer;
- Create an unlock schedule to a door or a group of doors;
- Review and print reports of actions taken in the Area Access Scheduling Tool.

Special events, lectures, meeting, classes and more can be accommodated as you create your schedules. Unlock or secure a door from any browser while on WSU's secure network. Provide access to those who need it when it is needed. You have the control.

Only authorized individuals who have received training are authorized to use OnGuard Area Access Manager program.

By the end of this course, AAMs will be able to verify access for cardholders on campus, grant authorized access, and remove access in accordance with PPM 5-44a.

#### Training Objective Include an Understanding of:

- How to log on to the Live Scheduling application
- Live Door Control
- Lock Scheduling
- Reporting

Should you have any questions regarding the use of Area Access Manager, contact the Central Access Manager at <a href="mailto:CardAccess@weber.edu">CardAccess@weber.edu</a> or the Facilities Management Key & Lock Shop at the numbers below:

Key & Lock Shop	x8095
Manager	x8042
FM Help Desk	x6331
Afterhours	x6693

#### **Definitions:**

<u>Credentials</u>: Any technology that is supported and authorized by Weber State University to be utilized with the electronic access system. Common credentials currently used at WSU include MAG and/or PROX cards.

**MAG cards:** Standard issue Wildcards with a magnetic strip on the reverse side. MAG cards are used by swiping them at a reader (similar to swiping a credit card).

**PROX cards:** Proximity cards look similar to standard issue Wildcards and they include embedded circuitry and technology that allows a reader to recognize cards presented to a reader within a designated proximity. Holding a PROX card in front of a reader for approximately one second allows the credential to be scanned for recognition.

**Area Access Manager (AAM):** Person responsible for administering electronic access rights to approved cardholders in specific areas. The appropriate Vice President or Dean will determine the AAM position.

**<u>Door Status</u>**: A door will always be in one of four (4) statuses: Unlocked, Card Only, Locked, or First-Card Unlocked.

<u>Unlocked</u>: Door status indicating that the door in in an unlocked state and can be entered without the use of a credential.

<u>Card Only</u>: Door status indicating the door is secured and cannot be opened without a valid credential.

**First Card Unlock:** Door status indicating the door is secured in a Card Only status. When an authorized credential is presented at the reader, the door will change it's status to Unlocked.

**Locked:** Door status indicating that the door cannot be opened by anyone. This includes those with valid credentials. This is a hard lockdown function and should not be utilized within schedules.

**Low Priority:** Standard priority schedules. Multiple standard (or low) priority schedules can be scheduled each day on the same door, so long as they do not overlap. Overlapping schedules may not run properly. All actions must be at least one (1) minute apart.

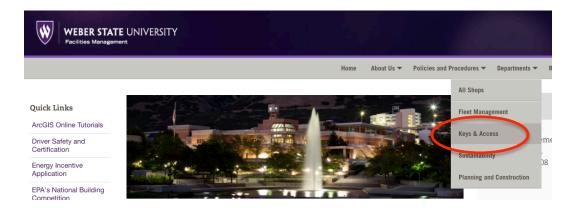
**<u>High Priority</u>**: Over-writing schedules. A high-priority schedule will over-ride any other schedules for a particular door. You can only have one (1) high priority schedule for any given day and door combination.

## Open Access: Live Control & Scheduling is available through the Facilities Management Key and Access website.

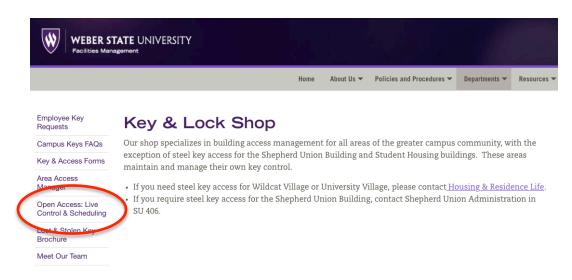
- **Step 1:** Open your choice of Internet browser and go to <a href="www.weber.edu">www.weber.edu</a>
- **Step 2:** Using the A-to-Z Index, navigate to Facilities Management.



**Step 3:** Click the **Department** dropdown menu and select **Keys & Access**.



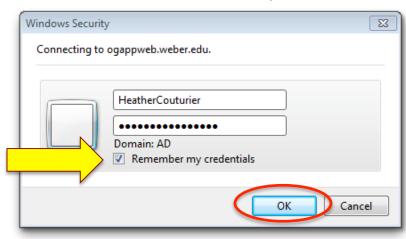
**Step 4:** Click the Open Access: Live Control & Scheduling link



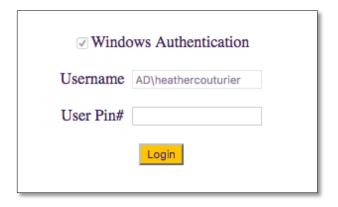
#### **Logging in to Open Access**

**Step 1:** Open the program and log in with your Wildcat Username and Password.

Check the box next to, "Remember my credentials."



**Step 2:** At the Windows Authentication login, enter your PIN and click **Login**.

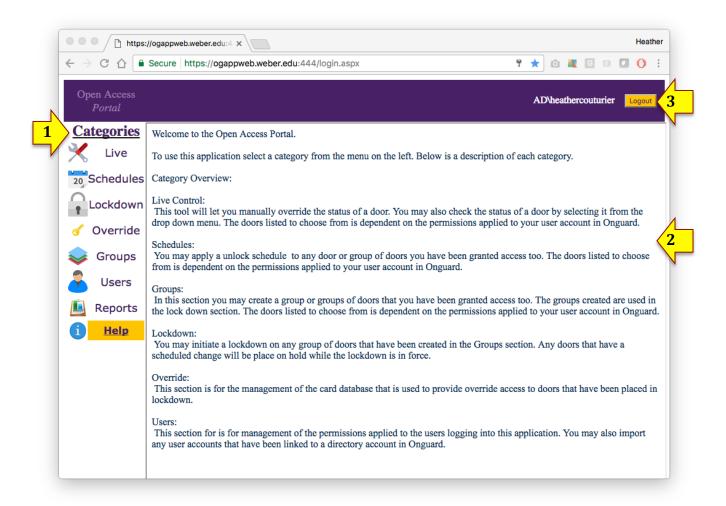


The landing page upon logging in is also your **Help Screen.** Carefully reading the listed function descriptions will provide a greater understanding of the application.

**NOTE:** Your screen may appear differently than the one displayed in this guide and you may not have access to every tool within the application.

Access to different doors and functions of the tool are dependent upon your OnGuard account permissions. Area Access Managers should be able to access Live Control, Schedules, Help and Reports.

#### **Review of Live Scheduler Application Window**

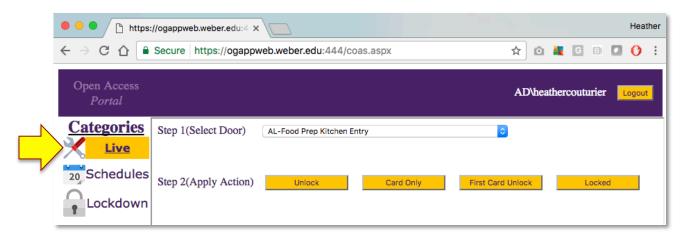


- **1.** The **Side Menu** lists the different menu categories hosted within Open Access.
  - As an Area Access Manager using Open Access, you will have access to four screens listed here:
    - o **Live:** Allows you to have live, real-time control of a door's status.
    - **Schedules**: Allows you to create schedules to unlock/secure doors automatically through the electronic access central system.
    - o **Reports**: Allows you to view actions taken within the application.
    - **Help**: Explains each of the menu categories and serves as the landing page.
- **2.** The **Main Window** will provide you with information and/or be your workspace area while using this application.
- **3.** Your **Logout** button appears in the upper right corner of your screen.

#### **Using the Live Function in Open Access**

The Live function allows you to verify and change the lock status of individual doors in real time. It is a 'Live" system, providing live information and the ability to change the status of a door immediately, in real time.

To access this function click the Live link in your side menu



Your workspace will change to show a dropdown menu and four (4) buttons.



#### Make sure you understand the definitions for the buttons:

**Unlock** – Unlocks the door and allows anyone to enter freely.

**Card Only** – Secures the door and allows those with authorized credentials access to the space..

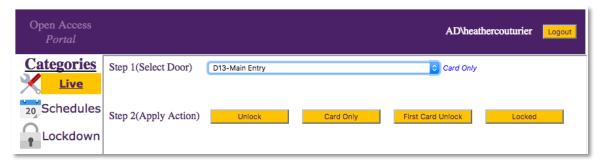
**First Card Unlock**– Secures the door and allows those with authorized credentials access to the space. When a first card with valid credentials is presented, the door will change to an Unlocked status.

**Locked**- Secures the door in a hard lockdown. No one will be able to enter the door.

#### Check the Status of a Door

**Step 1:** Using the dropdown menu, locate and click to select the door.

The system will verify and display the current status of the door to the right of the dropdown menu. This may take a couple of seconds.



The above image shows the Main Entrance to D13 is currently in a Card Only status.

#### Change the Status of a Door

- **Step 1:** Using the dropdown menu, locate and click to select the door.
- **Step 2:** Click the appropriate button for the action you wish to take place.

The system will change the door status and display the current status of the door to the right of the dropdown menu. This may take a couple of seconds.

Using the dropdown menu next to **Step 1 (Select Door)**, choose a door. You may need to pause for a few seconds to allow the servers to communicate the information back to your screen.

- Doors in an unlocked state will read "Unlocked" in green.
- Doors in a card only state will display "Card Only" in blue.
- Doors in a lockdown state will display "Locked" in red.

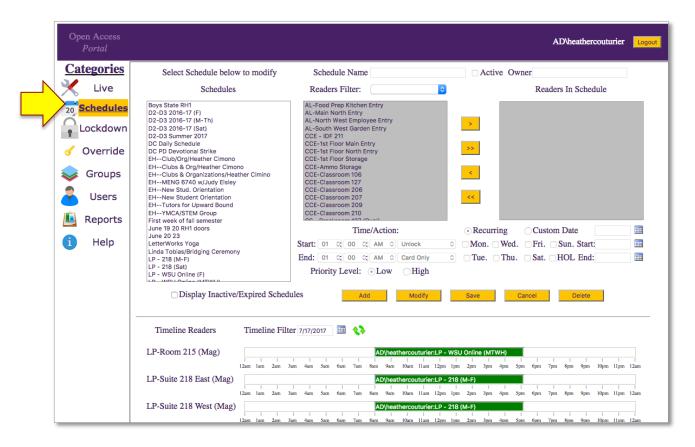


Note that setting a door to 'Locked' will lockdown the door and no access will be granted, even to those with assignments to a Wildcard.

#### **Creating Unlocking Schedules in Open Access**

The Schedule function will allow the Area Access Manager to create schedules to automate the unlocking of doors on the central system. Schedules can be created for one or many doors as a one-time event or a repeating event.

To access this function click the **Schedules** link in your side menu



The Scheduling workspace will appear. From this screen, you can review schedules already entered into the system for the doors you have been assigned to manage.

Take a moment to review the different areas of the screen. There is a list of schedules entered in the 'Schedules' area on the left, as well as a visual representation for each door shown below in the "Timeline Readers" area. You can use the Timeline Filter to look at specific dates in the future for planning purposes.

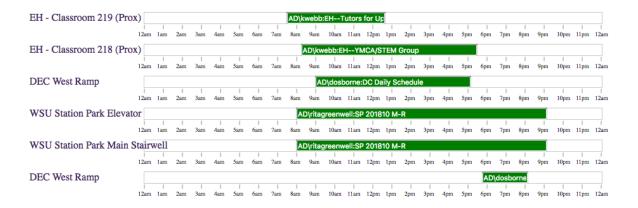


Any sections grayed out on the display are currently inactive, and unavailable to the user.

#### Viewing the Current Day's Unlocking Schedules

Scroll down the page to see any individual door unlocking schedules for the current day. Each door or reader with a schedule will be listed on the lower left beneath Timeline Readers. A green bar indicates the scheduled unlocking times, and is labeled with the schedules owner's name and the schedule's title.

To see the schedules in your area for a specific date, select the desired date from the Timeline Filter and click the green refresh button.



#### **Viewing Future Unlocking Schedules**

When planning schedules, it is always best to first check to see what schedules already exist. Use the Timeline Filter option to view future schedules.



- **Step 1:** Click the calendar icon next to the Timeline Filter
- **Step 2:** Select the date you wish to see schedules for
- **Step 3:** Click the filter refresh button (two circling green arrows)

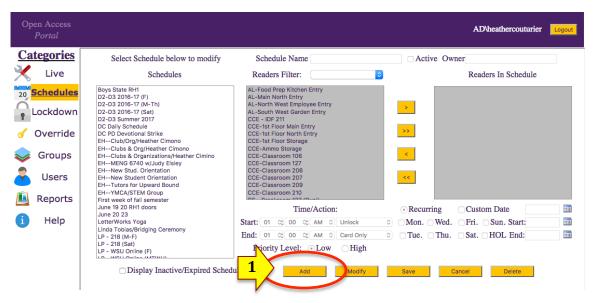
The schedules are refreshed and displayed for the chosen date.



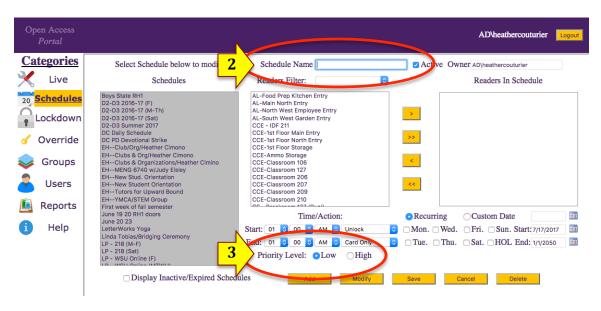
Note: We have had some issued with the schedule owner and name not displaying properly. We are aware of the issue and it is being addressed. The timeline readers and the green bar indicating start and stop times will be correct – only the labeling within the green bar in inaccurate.

#### **Creating Schedules**

Step 1: Click Add to create a new schedule.



You will notice a change in the screen; formerly grayed-out sections are now active and accessible to the application user.



**Step 2:** Enter a unique and memorable name for your new schedule. Always begin the name with the two-letter code for your building.

**Step 3:** Set your schedule priority level

LOW: Standard Schedule Priority

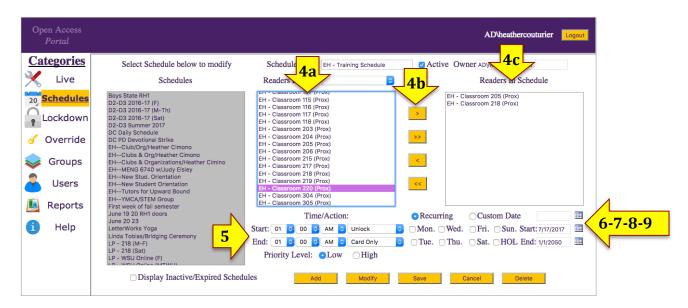
**HIGH**: Over-Riding Schedule; Overrides ALL other schedules.

**Step 4:** Select the door(s) you wish to include in the schedule.

**4a.** Select the doors you wish to include in the schedule by selecting one or more doors

**4b.** Using the single arrow key to place them in the schedule. If you wish to place all doors into a schedule, use the double-arrow. Double-clicking the door's name will move it from one pane to the other. Use the lower arrows or double-clicking method to remove any doors that you do not wish to include in a similar manner.

**4c.** Review your door list to ensure all desired doors are included.



**Step 5:** Select the starting and ending times and actions.



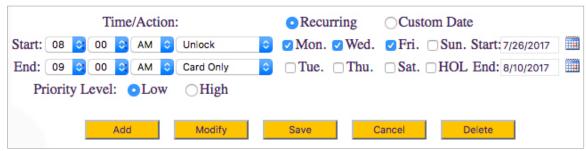
**Note:** Unless otherwise scheduled, doors are maintained in a Card Only status. Schedules will typically begin with an Unlock action. **Always end a schedule with Card Only.** 

**Step 6:** Select Recurring or Custom Date.

**Recurring** schedules last more than one day. **Custom Date** schedules are one time events.

**Step 7:** Select your start and end dates for a recurring schedule or your Custom Date

**Step 8:** Select the days of the week you want the schedule to occur during the dates selected in step 6. If you do not click any of the day-of-the-week checkboxes, your schedule will not work.



The image above shows a standard (low priority) schedule that will automatically unlock the selected door(s) at 8 am on each Monday, Wednesday and Friday between July 26, 2017 and August 10, 2017. The doors will re-secure each day at 9 am.

**Step 9:** If you need to have a door open on a University holiday, you must select the 'HOL' checkbox to override the University's regularly planned holiday closure.



All standard unlocking schedules are automatically deactivated during University holidays.

**Step 10:** Review schedule for completion and accuracy. When ready, click **Save**.

Your schedule will appear in the left-most section of the main screen under the heading "Schedules". If you do not see your schedule listed, click the 'Schedules' menu tab again to refresh your screen.

See Appendix A for schedule examples.

#### Change or Modifying a Schedule

Step 1: Open the Schedules menu

**Step 2:** Locate the schedule you want to modify in the Schedules list on the left side of your workspace and click to select it.

This will allow you to see the details of the schedule, including the reader/doors included, starting and ending dates/times, etc.

**Step 3:** Click the **Modify** button.

**Step 4:** Make any changes needed.

**Step 5:** Click the **Save** button.

#### **Deactivating a Schedule**

Deactivating a schedule will allow you to keep it for your records, but remove it from your active schedule list. This is helpful for annual or semi-annual schedules that will only need a slight modification before being run again.

**Step 1:** Open the **Schedules** menu

**Step 2:** Locate the schedule you want to modify in the Schedules list on the left side of your workspace and click to select it.

**Step 3:** Click the **Active** checkbox at the top of the screen next to the Schedule Name to de-select the option.



**Step 4:** Click the **Save** button.



Deactivating a schedule while it is actively running (aka while the door is unlocked) will cause the door to remain unlocked.

**Always verify door status** when deactivating an actively running schedule.

#### **Viewing Inactive/Expired Schedules**

You can view your inactive schedules by selecting the checkbox below your list of schedules as shown below.

✓ Display Inactive/Expired Schedules

#### **Deleting a Schedule**

You can delete an un-needed schedule by selecting it and clicking 'Delete'

**Step 1:** Open the **Schedules** menu

**Step 2:** Locate the schedule you want to modify in the Schedules list on the left side of your workspace and click to select it.

**Step 3:** Click the **Delete** button.

#### Reports

Reports can be especially helpful in getting detailed information about any actions taken with Open Access., however current functionality is somewhat limited.

To access a report, select the area of interest from the Reports dropdown menu and click Go.

**Live Control Reports** show the user, doors, action taken, the action type, and the date and time of the event.

The **Schedules Report** shows a record of actions taken by a schedule created on the Schedules page of the application.

The **Lockdowns** and **Authentication** reports show details about lockdown events and authentication events (logging in and logging out of the application). An export function is available for documentation purposes.

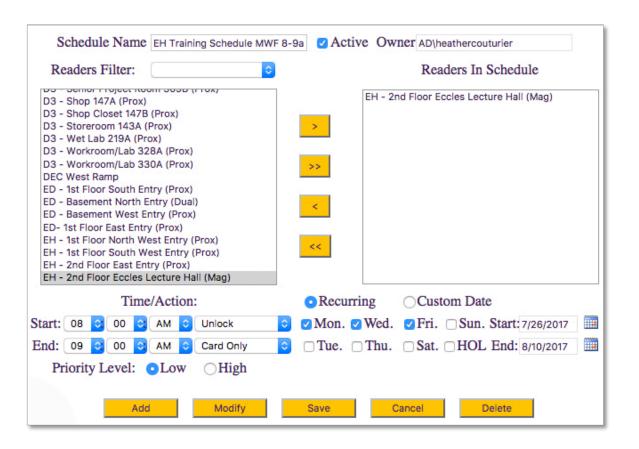
Contact <u>cardaccess@weber.edu</u> or call our office at extension 8042 should you need additional assistance or have any questions. Thanks for being part of our team!

#### **Recurring Schedule Example**

Recurring Schedules will activate more than one time.

The schedule example below shows a schedule for Elizabeth Hall.

- The schedule has been given a unique but descriptive name beginning with the two-letter code for the building.
- The schedule is currently active and will display in the active schedules list.
- This is a standard, or low, priority schedule.
- One door/reader has been selected.
- The door/reader is set to automatically unlock every Monday, Wednesday and Friday within the schedule's start and end dates July 26, 2017 and August 10, 2017
- The door will automatically unlock at 8 am and secure back into a Card Only status at 9 am on these days.

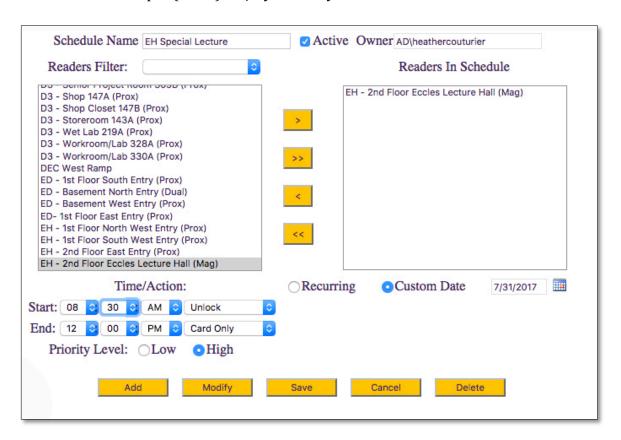


#### Over-Ride Schedule Example

Over-riding schedules will over-ride any other schedules in place for the doors and days included in it.

The schedule example below shows an override schedule for Elizabeth Hall.

- The schedule has been given a unique but descriptive name beginning with the two-letter code for the building.
- The schedule is currently active and will display in the active schedules list.
- This is an OVERRIDING, or high, priority schedule.
  - No other schedules for the door(s) included will run on the selected day(s).
- One door/reader has been selected.
- The door/reader is set to automatically unlock on July 31, 2017.
- The door will automatically unlock at 8:30 am and secure into a Card Only status at 12 pm (Noon) on July 31st only.

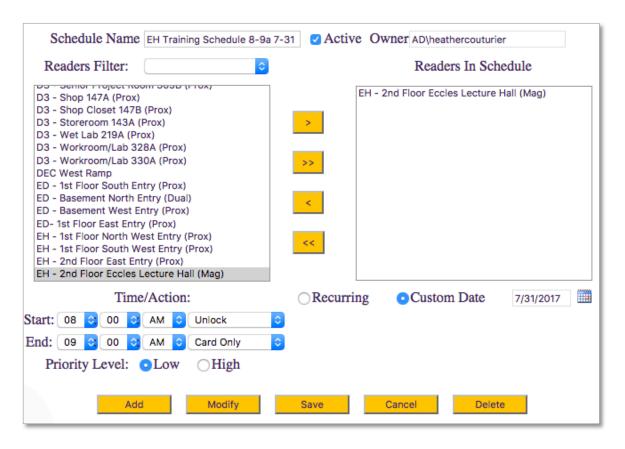


#### **Custom Date (One-Time) Schedule Example**

Custom Date schedules will only activate once.

The schedule example below shows a schedule for Elizabeth Hall.

- The schedule has been given a unique but descriptive name beginning with the two-letter code for the building.
- The schedule is currently active and will display in the active schedules list.
- This is a standard, or low, priority schedule.
- One door/reader has been selected.
- The door/reader is set to automatically unlock on July 31, 2017 only.
- The door will automatically unlock at 8 am and secure back into a Card Only status at 9 am on July 31st.



#### **Quick Sheet for Creating Schedules**

#### **Determine Schedule Priority Level**

- 1. Click Schedules
- 2. Check reader schedule for desired date
- 3. Does a schedule exit for the reader(s) on the desired date?
  - a. Yes The new schedule is HIGH priority
  - b. No The new schedule is LOW priority

#### **Create New Schedule**

- 1. Click Schedules
- 2. Click Add button
- 3. Create schedule name starting with the building's two-letter code \_\_\_\_\_
- 4. Select and add doors/readers to Readers In Schedule list
- 5. Set start time and action status
- 6. Set end time and actions status of 'Card Only'
- 7. Set priority level as determined above
- 8. Select schedule type
  - a. Custom Date (Occurs only once; not a University Holiday)
  - b. Recurring: Occurs more than once or occurs on a University Holiday

#### For Custom Date (One-Time) Schedules

- 9. Click to select Custom Date
  - a. Select date for one-time event.

#### For Recurring Schedules and Holiday Override Schedules

- 9. Click to select Recurring
  - a. Set start date
  - b. Set end date
  - c. Select checkboxes for days of week schedule will run
  - d. If you wish a door to unlock on a University Holiday during this schedule, click to select/active the "HOL" checkbox

#### **Complete & Save New Schedule**

- 10. Click Save button
- 11. Refresh Schedules list by clicking "Schedules"
- 12. Locate schedule name and click to select it
- 13. Verify proper readers, start/end time, start/end dates and priority.
- 14. Use Modify as needed for any changes.