Access Groups

"Access Groups" refer to access '<u>templates</u>' that are created to control the badge holders' access to specific doors in a building, at specific times. The Access Groups do not play any role unless they are attached to Personnel records.

The *'Access Groups'* screen is provided for creating these 'access templates'. The templates contain a listing of all card readers in the CardAccess system. The readers can be activated to allow access at the doors by assigning time schedules.

The resulting effect is that, when an access group (comprising of a time schedule attached to a Reader) is assigned to a badge holder, he will be allowed access to the doors included in the access group, during the time schedule specified for every Reader in the group.

The same access group can be assigned to other badge holders who have similar access permissions at a door.

The CardAccess permits a maximum of 1000 access groups (inclusive of **Dedicated Access** groups).

Opening Access Groups Screen

Access Groups screen can be opened in two ways as below:

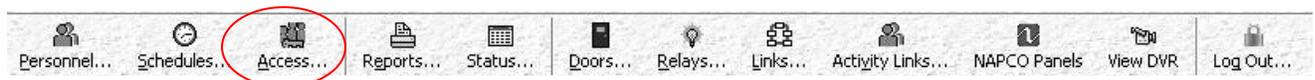1. **By clicking the** Access **button on CardAccess tool bar.**

Fig. 42.1. Access button on CardAccess tool bar.

2. **By clicking the** Access→Access Groups **menu options in CardAccess menu bar.**

Fig. 42.2. The 'Access Groups' menu option in 'Access' menu.

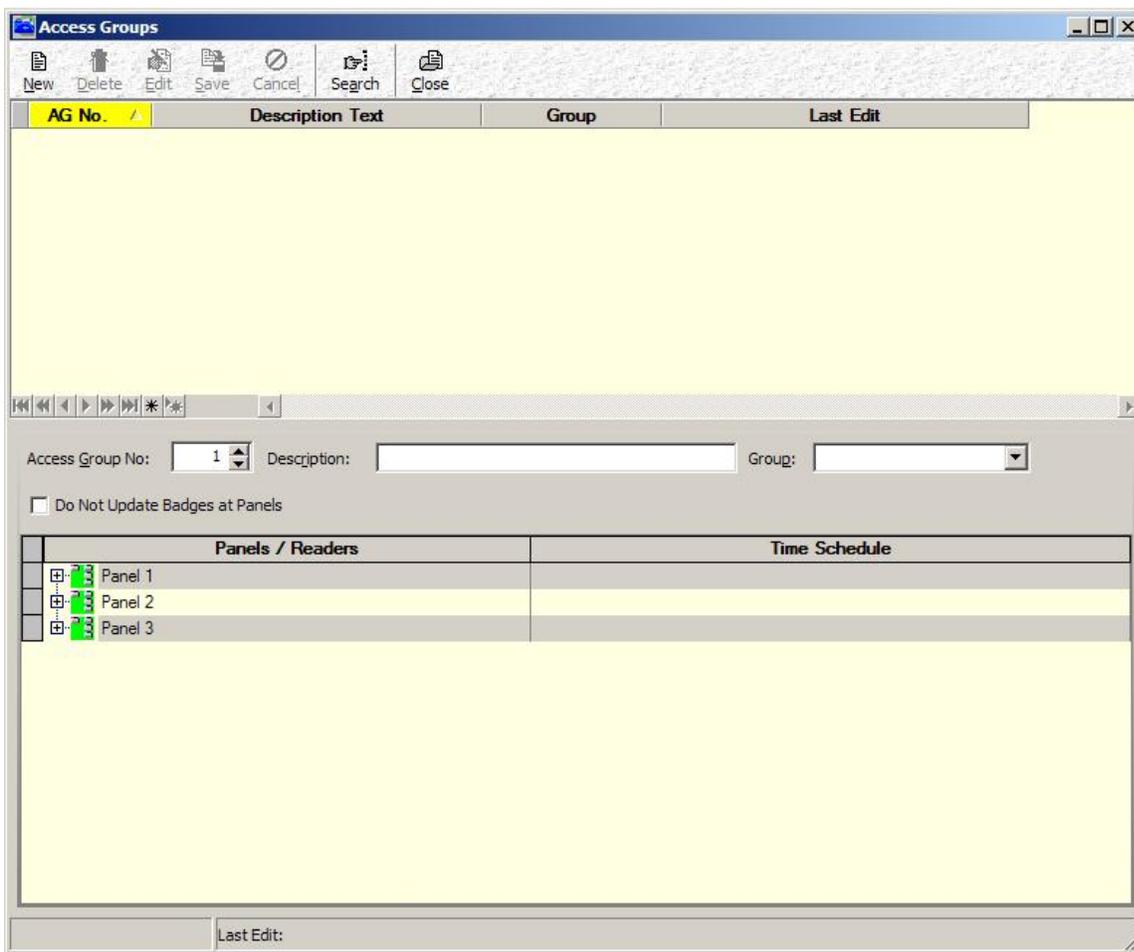Both the methods will open the 'Access Groups' screen as below.

Fig. 42.3. The 'Access Groups' screen.

The 'Access Groups' screen (see above figure) is divided into two halves. The top half of the screen contains the main toolbar and a view window. The view window will show a list of all Access Groups created in CardAccess. In figure 42.3, the view window is empty as no access group is created yet.

The bottom half of the screen contains two columns- *Panels/Readers* and *Time Schedule.* The Panels/Readers column will show the names of all Panels that are created in the 'Panels' screen. To the left of each Panel name you will see a node (+ mark). Expanding a Panel node will show the list of all Readers that belong to the selected Panel, and whose records are created in the 'Readers' screen. The Time Schedule column at this point will be empty.

Types of Access Groups

There are two types of access groups. They are:

1. Standard Access Groups- **Standard Access Groups are created in the** *'Access Groups'* **screen. These access Groups can be assigned to as <u>many</u> badge holders as you wish. Creation of standard access Groups will be explained in detail below.**

2. Dedicated Access Groups- **Dedicated access groups are created in the** *'Personnel'* **screen. A dedicated access group is <u>unique</u> to a particular badge holder, and cannot be assigned to other badge holders. Refer the section <u>Personnel</u> for creating dedicated access groups.**

Note:

The following are the pre-requisites for creating access groups.

- **Readers and Time Schedule must be created in CardAccess software. Refer the sections <u>Readers</u> and <u>Schedules</u> to do this.**

- **The CardAccess administrator needs to list out all cardholders in the system, and decide who should have access to what doors, and at what times of the day.**

Creating an Access Group

As an example, let us create an access group for the 'Human Resource' department in a company. Let the access of the employees be limited to two Readers- *First Floor Cafeteria* **and** *First Floor Employee Entrance*, **during** *Business Hours of the Weekdays.*

The following are the steps involved.

1. **Open 'Access Groups' screen by clicking on** Access **button or** Access→Access Groups **menu options in the CardAccess main screen.**

2. **Click the** New **button located on Access Groups screen toolbar.**

Note: **The** Access Group No **control will show the default value 1. The value will be incremented for every new Access Group you create.**

3. **In the** Description **field, type in a descriptive name for the access group you are creating.**

Note: **There is no error checking on the name you assign to something. Thus, you could create a time schedule that includes only weekend hours (or no hours what-so-ever), but you could call it Weekdays, Business Hours. Therefore, when you are programming Access Groups and using schedules from the Schedules screen, <u>you are strongly advised to check to be sure that the operation of a given schedule matches the name of the schedule.</u>**

In the figure below, we have given the name *Human Resource* **for the access group we are creating.**

Description: | Human Resource

Fig. 42.4. Naming the Access Group.

4. **If required, a group can be selected for the access group by clicking the down arrow of** Group **control, and selecting a desired group name in the drop down list. The group names listed will be those that are created in the Groups screen.**

Note: **In case no group names are seen in the list, you need to create some in the Groups screen, on the Access Groups tab. Refer the section Groups to do this.**

5. **When the access group being created is assigned to badge records, there can be changes to the access permissions of the concerned badge holders. Hence, it is necessary to get the changed information to every hardware access control panel. By default, the system is set up to <u>automatically</u> download changed data to the panels. But, in case you are dealing with a large system, changes to thousands of badges can cause a massive download that may disable the system for a period of time. To prevent this from happening, you can check the** Do Not Update Badges at Panels **check box.**

6. **Decide on the Reader you wish to include in the current Access Group, and expand the corresponding Panel node. On expanding the Time Schedule column corresponding to that Reader will show the default selection** *Not Used***.**

Note: **If no Reader is seen on expanding the Panel node, you need to create Reader records newly in the Readers screen. Refer the section Readers to do this.**

In the figure below, we have located the Readers *First Floor Cafeteria* **and** *First Floor Employee Entrance* **under** *Panel 1* **node.**

Panels / Readers	Time Schedule
⊞ 3 East Door - Silver Lock	
⊞ 2 East Wing - Panel 2	
⊟ 1 Main Office - Panel 1	
1 Pnl 1 - Rdr 1	24 x 7
2 Pnl 1 - Rdr 2	24 x 7
4 P1 R1	24 x 7
⊞ 4 West Door - Brown Lock	

Fig. 42.5. Locating Readers that are to be included in the Access Group.

Observe that, at this point, the rows corresponding to the Readers you have located are showing the default selection '*Not Used*'.

7. **Select a desired time schedule for the located Reader. This can be done as below.**

   o **Click the** Time Schedule **column corresponding to the located reader. Doing this will display a down arrow in the 'Time Schedule' column.**

   o **Click the down arrow to display the list of Time schedules (previously created) in the CardAccess.**

   Note: **If no time schedules are seen in the list, you need to create them afresh. Refer the section Schedules to do this.**

   o **Select the desired time schedule and click on it.**

Similarly, select time schedules for the other Readers you wish to include in the access group.

In the figure below, we have selected the time schedule 24x7 for the readers we located earlier.
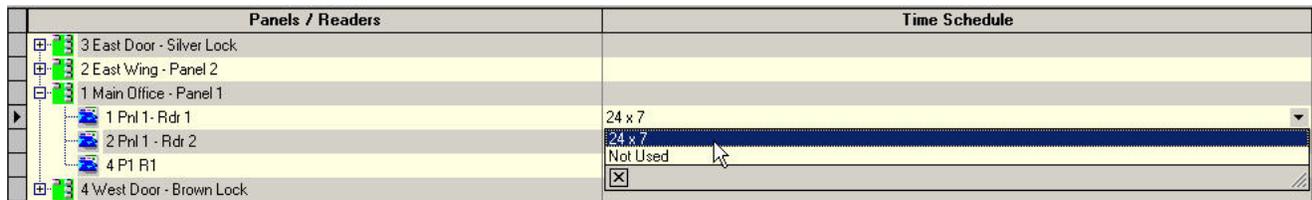
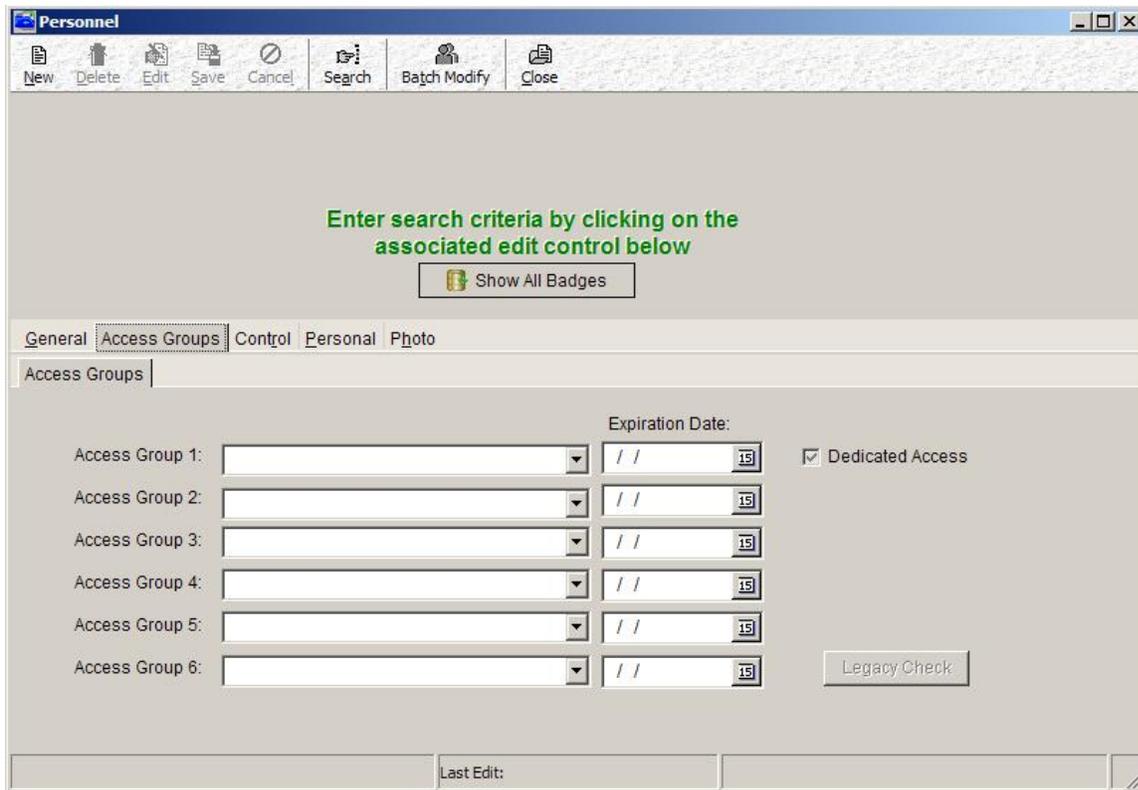**Fig. 42.6. Selecting Time Schedules for the located readers.**

8. **In case you wish to include Readers belonging to other Panels also, repeat steps 6 and 7 for the desired Panels under the *Panels/Readers* column.**

9. **Click the** Save **button on the toolbar to save these settings.**

10. **Click the** Close **button on the toolbar to close the screen.**

An Access Group is thus created. When this Access Group is assigned to Personnel records, the concerned Personnel will be allowed access at the included Readers, during the specified Time Schedules.

Access groups created in the 'Access Groups' screen become functional only when they are assigned to badge holder record(s).

The figure below shows the Access Groups tab of 'Personnel' screen that contains the Access Group controls.

Fig. 42.8. 'Personnel' screen Access Group controls.

The Access Group controls in figure 42.8 are briefly explained below.

Access Group 1-6 **controls are used to select desired access groups (previously created in the 'Access Groups' screen) for the badge holder records in 'Personnel' screen. For details on these controls, refer the section Personnel.**

The Expiration Date **control can be used if you wish to fix a date for removing the access group assigned to a badge holder. When the date is reached, the**

badge holder can no longer access the doors that were included in the access group. For more details, refer the section [Personnel](.).

The Dedicated Access **check box can be used to create a 'dedicated' access group for the selected badge holder, in the 'Personnel' screen. A dedicated access group is <u>unique</u> to the particular badge holder, and cannot be assigned to anybody else. Refer the section [Personnel](#) for creating dedicated access groups.**

‘Get Template’ Button

While in *New/Edit* mode, the Access Groups screen displays a button named as ‘Get Template’.
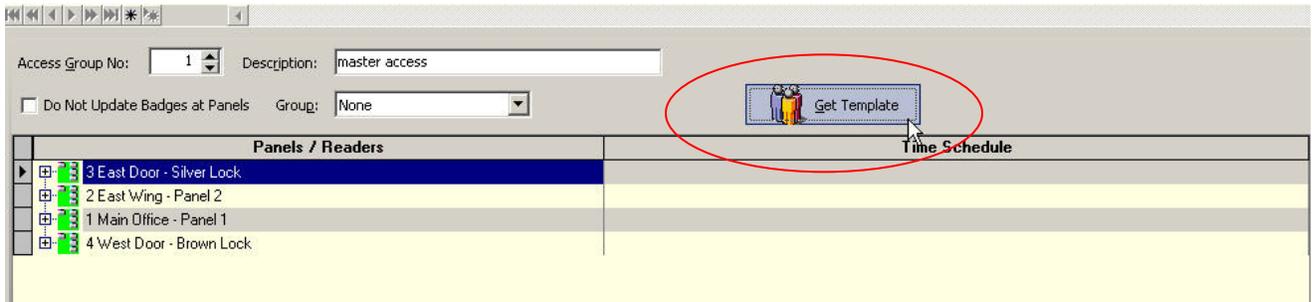

Fig. 42.9. The ‘Get Template’ button visible on clicking ‘New’/‘Edit’ button on the toolbar.

This button allows you to use the settings of a different access group (created previously), as the basis for creating/editing the access group in question. Templates serve as a time saving feature as you can conveniently load the settings of an existing access group, without having to make those settings all over again.

Below we explain how to use the ‘Get Template’ button to create a new access group.

Below we will create a new access group called 'Engineering Staff'. The new access group will allow access to the *First Floor Employee Entrance* Reader, the *Engineering Office* Reader and the *First Floor Cafeteria* Reader, during Business Hours of Weekdays. We will use 'Human Resource' access group as the template, as it already has First Floor Employee Entrance and First Floor Cafeteria Readers included in the group.

Following are the steps involved.

- **Open** Access Groups **screen by clicking on** Access **button or** Access→Access Groups **menu options in the CardAccess main screen.**

- **Click the** New **button on the toolbar.**

- **In the** Description **field, type in a descriptive name for the access group.**

In the figure below, we have entered the name 'Engineering Staff' for the new access group.


Fig. 42.10. Naming an access group.

- **If required, a group can be selected for the access group by clicking the down arrow of** Group **control, and selecting a desired group name in the drop down list. The group names listed will be those that are created in the Groups screen.**

Note: **In case no group names are seen in the list, you need to create some in the Groups screen, on the Access Groups tab. Refer the section <u>Groups</u> to do this.**

- **When the access group being created is assigned to badge records, there can be changes to the access permissions of the concerned badge holders. Hence, it is necessary to get the changed information to every hardware access control panel. By default, the system is set up to <u>automatically</u>**

download changed data to the panels. But, in case you are dealing with a large system, changes to thousands of badges can cause a massive download that may disable the system for a period of time. To prevent this from happening, you can check the Do Not Update Badges at Panels **check box.**

- **At this point, none of the Readers listed under the Panels/Readers column will be assigned Time Schedules. You may check this by expanding the nodes (+ marks) seen to the left of the Panel names listed under the** Panels/Readers **column. The** Time Schedule **column against every Reader name will show you the default selection** *Not Used***.**
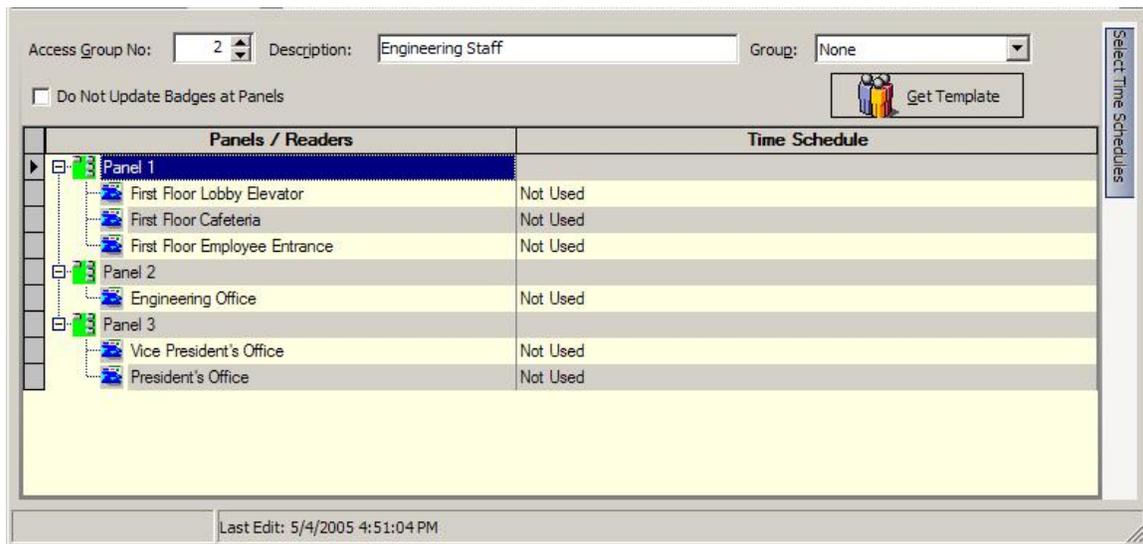
All nodes expanded.

Checking this way will help you understand the implications of selecting an access group template for the current access group.

- **Click the** Get Template **button. On clicking, the 'Select Access Group Template' dialog will be displayed.**
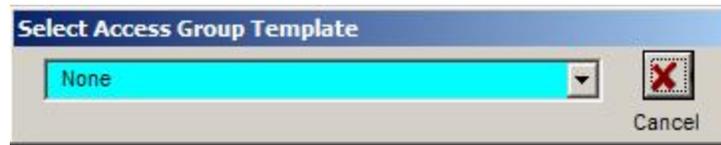
The 'Select Access Group Template' dialog.

- **In the** Select Access Group Template **dialog, click the down arrow of the control to view the list of available access groups in the CardAccess.**

Note:

- o **The drop down list will show <u>only</u> names of the standard access groups that are created in the 'Access Groups' screen. This <u>excludes</u> 'Dedicated' access groups (that are created in 'Personnel' screen).**

- o **The drop down list will show access groups names <u>only</u> if they are created earlier. If no access group names are seen in the list, they must be created afresh in the 'Access Groups' screen. To do this, refer the heading <u>Creating an Access Group</u> located earlier in this document.**

- **In the drop down list, locate the access group name whose settings you wish to load onto the new access group, and click on it.**
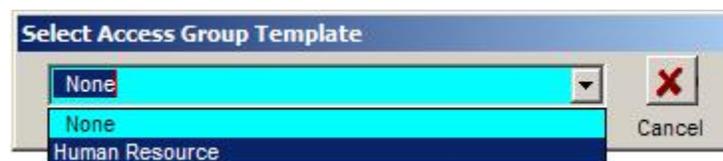
Selecting an Access Group that will act as a template for the current access group.

On clicking, the time schedule settings of the template will be loaded to the Readers of the current access group.

In the figure below, observe the time schedule *Weekdays, Business Hours* **loaded against the Readers** *First Floor Cafeteria* **and** *First Floor Employee Entrance* **after selecting** *Human Resource* **access group.**

Fig. 42.13. Time Schedule settings after template selection.

- **You may now make changes to these settings, by making fresh Time Schedule assignments to the Readers of your choice.**

Below we are selecting a time schedule for *Engineering Office* **reader.**

Fig. 42.14. Fresh Time Schedule assignment to Reader(s) of choice.

- **Click the** Save **button on the toolbar to save these settings.**

- **Click the** Close **button on the toolbar to close the screen.**

Thus, using a pre-existing Access Group, it is possible to create a new access group, by making use of the 'Get Template' button.

Editing an Access Group

Follow the steps below if you wish to edit an access group.

- **Open 'Access Groups' screen by clicking on** Access **button or** Access→Access Groups **menu options in the CardAccess main screen.**

- **In the upper half of the screen, click the access group record you wish to edit.**

- **Click the** Edit **button on the toolbar.**

- **Make the required changes to the controls seen in the lower half of the screen.**

Note: **An edited access group can change the access permissions of the badge holders. Hence, it is necessary to get the changed information to every hardware access control panel. By default, the system is set up to <u>automatically</u> download changed data to the panels. But, in case you are dealing with a large system, changes to thousands of badges can cause a massive download that may disable the system for a period of time. To prevent this from happening, you can check the** Do Not Update Badges at Panels **check box.**

- **Click the** Save **button on the toolbar to save the changes.**

- **Click the** Close **button on the toolbar to close the screen.**

- **Open 'Access Groups' screen by clicking on** Access **button or** Access→Access Groups **menu options in the CardAccess main screen.**

- **In the upper half of the screen, click the access group record you wish to delete.**

- **Click the** Delete **button on the toolbar.**

  On clicking, the following message box will be displayed to inform   that, deletion of the access group can remove the other related data.

Fig. 42.16. Message box displayed before deleting an access group.

- **After reading the message in the box, click the** Yes **button to delete the selected access group.**

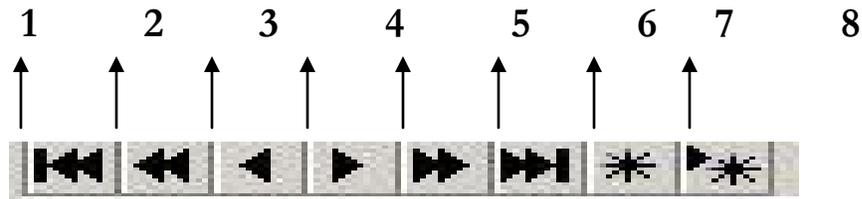- **Click the** Close **button on the toolbar to close the screen.**

Fig. 42.17. The 'Access Groups' screen navigation bar.

The Access Groups screen navigation bar can be found in the middle of the screen (just above the Access Group No **control). The buttons of the bar can be used for viewing older/newer/bookmarked records in the *Access Groups* screen. In figure 42.17, we have numbered the buttons of the bar to provide simpler explanation. The functions of the buttons are as follows:**

- *Button 1:* **Placing the mouse cursor over button 1 will display the message** *First record.* **Accordingly, clicking on this button will highlight the very first access group record in the screen.**

- *Button 2:* **Placing the mouse cursor over button 2 will display the message** *Prior page.* **Accordingly, clicking on this button will highlight the last record in the page previous to the current page, containing the highlighted access group record.**

- *Button 3:* **Placing the mouse cursor over button 3 will display the message** *Prior record.* **Accordingly, clicking on this button will highlight the record previous to the currently highlighted access group record.**

- *Button 4:* **Placing the mouse cursor over button 4 will display the message** *Next record.* **Accordingly, clicking on this button will highlight the record appearing after the currently highlighted access group record.**

- *Button 5:* **Placing the mouse cursor over button 5 will display the message** *Next page.* **Accordingly, clicking on this button will highlight the first record in the page appearing after the current page, containing the highlighted access group record.**

- *Button 6:* **Placing the mouse cursor over button 6 will display the message** *Last record.* **Accordingly, clicking on this button will highlight the last record of** *Access Groups* **screen.**

- *Button 7:* **Placing the mouse cursor over button 7 will display the message** *Save Bookmark.* **Clicking on this button will bookmark the highlighted access group record.**

- *Button 8:* **Placing the mouse cursor over button 8 will display the message** *Goto Bookmark.* **Clicking on this button will highlight the previously bookmarked access group record.**