



Enrollment Operator Guide

Avigilon™ Access Control Manager™ System

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Introduction

This guide provides an overview of the default Enrollment Operator role as defined in the Avigilon Access Control Manager (ACM™) software. This guide is meant to be used and referred to by those assigned the role of an Enrollment Operator within the ACM software.

Enrollment Operators manage identities within the system. They are responsible for creating new identities and maintaining identity records. Enrollment Operators are also responsible for creating, issuing, and printing badges. For more information, see *Permissions and Rights* on page 10.

NOTE: This guide does not define the role of an Enrollment Operator on all sites. Please contact your System Administrator for more details.



Identities

The Identities screen gives you access to all tokens and operators of the system. An identity is added to the system when a new user needs access to the site. For example, when a person is hired. Access to a site may be physical access to an area or access to the ACM system to manage the site.

Physical access to the site allows a user to access areas and doors. Access to the ACM system allows users to manage the site, such as adding users or monitoring events.

For a user to have access to the system or physical access to the site, they must have an identity.

- If the user requires access to the system, they are issued a login and password. This allows the user to access areas of the system. The areas of the system the user has access to depends on their role.
- If a user requires physical access to the site, they are issued a token. The token gives the user physical access to the site. This allows the user to access areas on the site. The areas the user has access to depends on their role in the system.

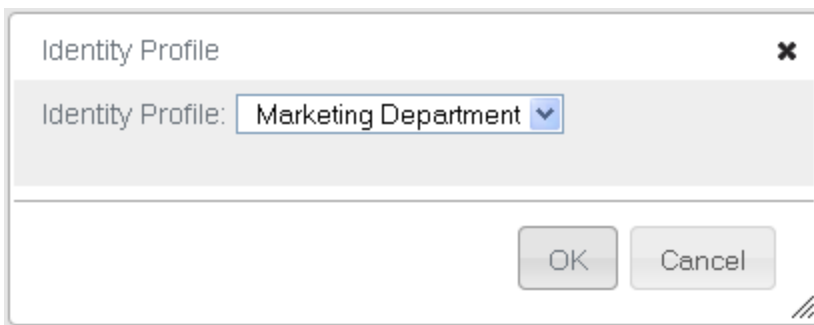
Adding an Identity

When a new user needs access to the ACM system or physical access to the site, they must have an identity. If the user requires access to the system, they are issued a login and password. This allows the user to access areas of the system. The areas of the system the user has access to depends on their role.

To add a new identity:

1. Click **Identities** from the icon task bar.
The Identities Listing page appears.
2. Click **Add New Identity**.

If you have defined one or more Identity Profiles for this system, the Identity Profile dialog box will pop up:




- From the **Identity Profile** drop down list, select the profile you want to assign to this identity, then click **OK**.
- If you do not want to assign an identity profile to this identity, click **Cancel**.

The Identity Add page appears. The data from the Identity Profile will be populated on the screen.

3. Fill out the **Last Name** field, then complete the page with the required details.


4. Click  .

When the page refreshes, you are automatically taken to the Roles page.

5. Assign roles to this identity as required, then click  .

When the page refreshes, you are automatically taken to the Tokens page.

6. Enter the token details as required. Select the **Download** check box to download the token to the connected panels and associated doors.

When you are finished, click  .

7. Navigate through the tabbed pages to add more details about the identity. The tabbed pages include:

- **Groups:** use this page to assign this identity to a group.
- **Access:** use this page to view this identity's access privileges including roles, access groups, and doors.
- **Capture:** use this page to take a photo of the user.
- **Photos:** use this page to upload an existing photo of the user.
- **Transactions:** use this page to view transactional data associated with the identity.
- **Badge:** use this page to assign a badge to this user.
- **Audit:** use this page to view a log of all the changes that have been made to this identity.

The default Enrollment Operator role does not have access to this tab. Contact your System Administrator for more details.

Identities - Assigning Roles


A role defines what a user has access to. For identities to have access to the system or physical access to the site, they must be assigned a role. Each role contains access groups and/or delegations. Access groups allow a user to have physical access to the site. Delegations allow a user to have access to the system. The user will be assigned a role depending on their position in the organization.

To assign roles to an identity:


1. Click **Identities** from the icon task bar.
2. From the Identities listing page, click on the name of the identity you want to edit.

The Identity Edit screen appears.

3. Select the **Roles** tab.

4. From the Available list, select all the roles that you want to assign to the user, then click  .

The role is added to the Members list to show that it is now assigned.

To remove a role from the user, select the role from the Members list, then click  .

NOTE: You can select multiple items by using the **Ctrl** or **Shift** key.

5. Click  .

Identities - Assigning Tokens

Tokens allow users to have physical access to the system. Tokens can be used to generate physical access cards. If a user requires physical access to the site, they are issued a token. The token gives the user physical access to the site. This allows the user to access areas on the site. The areas the user has access to depends on their role in the system.



To create tokens and assign them to an identity:

1. Click **Identities** from the icon task bar.
2. From the Identities listing page, click on the name of the identity you want to edit.

The Identities Edit screen appears.

3. Select the **Tokens** tab.
4. If only one token has been defined, the Tokens Edit page appears.

If more than one token has been defined, the Tokens Listing page appears. Click **Add New Token**.

5. Enter the details as required.
6. Click  .
7. Click **Download** to download the token to the connected panels and associated doors.
8. To assign this token to a badge, select the **Badge** tab.
9. From the **Badge Token** drop down list, select the internal number you want to assign to the badge.
10. Click  .


Identities - Assigning Groups

Groups are used to group physical and/or system components. Groups are assigned to identities primarily for batch updates. For example, if all the badges are close to expiry and they are assigned to the same group, the expiration date can be extended through a batch job.

To assign groups to an identity:

1. Click **Identities** from the icon task bar.
2. From the Identities listing page, click on the name of the identity you want to edit.

The Identities Edit screen appears.

3. Select the **Groups** tab.
4. From the Available list, select all the groups that you want to add the user to, then click  .

The group is added to the Members list to show that the user is now a member.

To remove a user from a group, select the group from the Members list, then click .


NOTE: You can select multiple terms by using the **Ctrl** or **Shift** key.

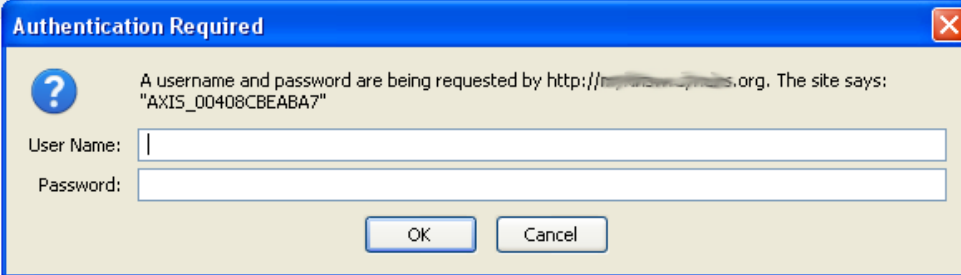
5. Click .

Capturing an Image of an Identity

You can capture an image of a person to display on the Identity page or print on a badge.

Once an image has been captured, a badge can be created for an identity. For more information, see *Identities - Creating Badges* on page 7.

1. There are two ways to arrive at the Capture page:
 - From the Identities Listing page, click  from the **Image Capture** column.
 - From the Identities Listing page, click on the name of an identity, then select the **Capture** tab.
2. If the camera requires authentication, this page will not appear until you have entered your login credentials:



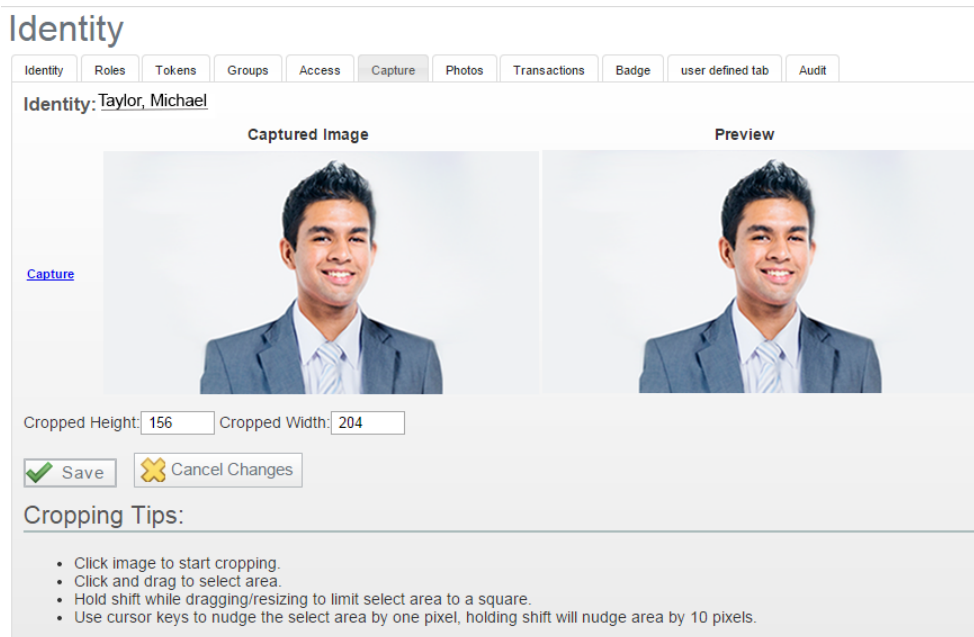
The image shows a dialog box titled "Authentication Required" with a blue header and a red close button. The main area has a light beige background. On the left is a blue question mark icon. To its right, text reads: "A username and password are being requested by http://[redacted].org. The site says: 'AXIS_00408CBEABA7'". Below this text are two input fields: "User Name:" and "Password:". At the bottom of the dialog are two buttons: "OK" and "Cancel".

Enter a user name and password, then click **OK**.

The capture page appears.

3. Click **Capture**.

The page refreshes to show the captured image on the left and a preview of the image on the right.



4. To crop the image, click the captured image on the left.
5. Click and drag to select the cropping area.

Hold **Shift** to constrain the area selection to a square.

Use the cursor keys to nudge the area selection by one pixel. Hold **Shift** to nudge the area selection by 10 pixels.

6. Click  .

Uploading a Photo of an Identity

You can upload images of a person to display on the Identity page or print on a badge.

Once a photo has been uploaded, a badge can be created for the identity. For more information, see *Identities - Creating Badges* on the facing page.

NOTE: Ensure the image has the appropriate dimensions to fit on the badge. Most badges are approximately 2 x 3 inches in size. The image must be in JPG format.

To upload an existing photo:

1. Click **Identities** from the icon task bar.
2. From the Identities listing page, click on the name of the identity you want to edit.


The Identities Edit screen appears.

3. Select the **Photos** tab.
4. Click **Upload Photo**.


The screen expands to include more fields.

5. Click **Choose File** and navigate the directory to find the image you want to upload.

Click **Open** to select the image.

If you want to delete this dialog box, click  .

If you want this image to appear on the Identity page, select the **Primary** check box.

6. When you're finished, click  .


The image is saved to the Photos page.

Identities - Creating Badges

Badges are identification cards that are used to verify a user's identity or association to an organization. Badges may also be used as access cards if they are printed directly on the person's RFID badge.

NOTE: Before you can print a badge, you must connect a badge printer to the network and configure it. For instructions on how to configure your badge printer, refer to the printer's user guide.

To create a badge for a user:

1. Click **Identities** from the icon task bar.
2. From the Identities listing page, click on the name of the identity you want to edit.
The Identities Edit screen appears.
3. Select the **Badge** tab.
4. From the **Badge Photo** drop down list, select a photo for this badge.
Only the photos that have been previously uploaded or captured appear in this list.
5. From the **Badge Token** drop down list, select the token you want to associate with this badge.
Only the tokens that have been previously defined for this user appear in this list.
6. From the **Badge Template** drop down list, select the badge template that you want to use for this badge.
Only the badge templates that have been previously defined appear in this list.
7. Click  .
8. To print the badge, click **Create Badge**.
The badge appears in a preview window.
9. Click **Print**.

NOTE: When printing the badge, ensure that the Header and Footer settings are turned off or set to blank.

Searching for an Identity

Use the Search feature to find an identity in the database.

1. The Search area is at the top of the Identity Search page. Fill out the following fields:
 - **Last Name** field.
 - (Optional) The **First Name** and/ or **Internal Number** fields.
2. Add any additional search criteria as follows:
 - Select the criteria from the **Search Field** drop down list.
 - Enter or select the value to search for in the **Search Value** field.
 - Click **Add Criteria** to add an additional search, then repeat the steps in the bullets above for each additional criteria. Add as many search filters as you need to fulfill your search criteria.
 - At any time, you can click **Clear Search** to clear all fields.
 - To remove a single criteria row, click **Remove**.
3. In the drop down list to the right of the **Search** button, select whether the values entered in the fields should be combined into a single search criteria (**And**) or used as separate search criteria (**Or**).

If **And** is selected, only the identities that fit all entered criteria will appear. If **Or** is selected, the identities that fit one or more of the entered criteria will appear.
4. When you have entered all your search criteria, click **Search**.

The page refreshes and displays your search results.

NOTE: Always enter data in the search value field. Searching using blank entries will return all identities as the result.

Editing an Identity

An identity must be edited when user information changes. For example if a user changes roles, their identity would need to reflect this. If the role is not updated, the user would not be able to access areas required for their new role.

To edit an existing identity:

1. Click **Identities** from the icon task bar.
2. Search on the Identity Search screen, then click on the identity you want to edit.

The Identity Edit screen appears.

3. Navigate through the tabbed pages and make the required changes. The tabbed pages include:
 - **Identity:** use this page to edit the identity details.

The default Enrollment Operator role cannot edit this page. Contact your System Administrator for more details.

- **Roles:** use this page to assign a role to this identity.
- **Tokens:** use this page to create a token for the identity.
- **Groups:** use this page to assign this identity to a group.
- **Access:** use this page to view this identity's access privileges including roles, access groups, and doors.
- **Capture:** use this page to take a photo of the user.

- **Photos:** use this page to upload an existing photo of the user.
- **Transactions:** use this page to view past alarms and events that were triggered by this user.
- **Badge:** use this page to assign a badge to this user.
- **Audit:** use this page to view a log of all the changes that have been made to this identity.

NOTE: Remember to click  to save the changes on each page.

Permissions and Rights

The following table describes the permissions and rights the default Enrollment Operator Role allows. All roles are made up of delegations. Each delegation is made up of rights.

Permissions	Rights
Add new identities. Cannot update fields after initial identity setup	Identities My Account Identities Listing Identities Show Identities Advance Search Identities Date Search Identity Profiles Listing Identity Profiles Show List Identities New Identities Create Identities Edit Identity Profiles Populate Values
Add, modify, and update available roles	Identities Roles List Identities Roles Update
Add, modify, and update tokens	Tokens Listing Tokens Show Tokens New Tokens Create Tokens Edit Tokens Update Tokens Set Free Pass Identity Profiles Tokens Listing
Add and modify groups	Identities Groups List Identities Groups Update
View assigned access permissions	Identities Show Access Identity Profiles Show Access
Capture live photos and save	Identities Image Capture Identities Image Save

Permissions	Rights
	Identities Code Image Identities Photo Capture
Add and upload photos	Identities Photo Edit Identities Photo Update Identities Photo Render Identities Upload Photo
View transactional data	Identities Transactions
Print and issue badges	Identities Badge Show Identities Badge Screen Identities Print Badge Identities Badge Render Identities Update Badge Preview Identities Update Badge