Technical Document

Niagara Enterprise Security Operator's Guide

November 19, 2024

Legal Notice

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Contents

About this guide

This guide is for the operations personnel who are responsible for daily procedures including adding personnel and managing badges, admitting visitors, and responding to alarms.

This document is part of the Enterprise Security technical documentation library. Released versions of software include a complete collection of technical information that is provided in both online help and PDF formats.

Document change log

This topic summarizes the changes made to this document.

November 19, 2024

Removed Assure ID references.

January 24, 2020

Minor changes made to the legal page. For branding purposes, removed the terms “security,” “security framework,” and specific product name. Removed references to the passkey, which is no longer supported.

August 8, 2019

- Reorganized document and added updates related to Niagara 4.8 release.
- Removed reference to the system passkey, which is no longer required.

September 17, 2018

Initial release for version 2.4

Related documentation

These documents provide additional system information.

- *Niagara Enterprise Security Facility Manager's Guide*
- *Niagara Enterprise Security Reference*
- *Niagara Enterprise Security Operator's Guide*

Chapter 1. People tasks

The following procedures describe how to enter personnel into the system, assign access rights and badges. It is not necessary to complete these procedures in the order that they are presented here.

CAUTION: If you are installing a remote controller as part of the system, set up all personnel information only at the Supervisor station. If you enter personnel information at a remote controller, duplicate records may result. This does not apply to a single, stand-alone system.

The setup task involves adding the new person to the station database, assigning access rights (the permissions that allow someone to enter the building), assigning a badge and setting up other information. Access rights designate where and when a person may enter a building, including which floors are accessible. Access rights may include an associated schedule, integration ID (for configuring the office environment when the person enters the building), tenant, and threat level group. A person may be assigned more than one access right.

Adding (or editing) a person

This procedure adds a person to the system.

Prerequisites:
You are working at the Supervisor station with admin authority. Any additional information to collect has been configured.

Step 1. Click **Personnel**.
The People view opens.

Step 2. Do one of the following:

- To add a new person, click the Add button (

).
- To edit an existing person, double-click the person record in the People view. If adding someone, the Add New Person view opens to the Person tab.

NOTE: Any time after entering a Last Name you can click the **Save** button to create the new person record. If you leave the view (not the tab) before saving, all data entered are lost and must be re-entered.

Step 3. Enter the person's names, **Employee Id** > **Department** > **PIN** and other properties.
While only the person's last name is required to create a personnel record in the station database, the best practice is to be prepared to enter the other information the system needs, including ID, department, tenant, etc.

Step 4. To complete the creation of a new person record, click the **Save** button.
The Summary tab opens with a summary of the properties you just created.

Assigning a PIN

Each person has a PIN (Personal Information Number), which is can be used to arm and disarm an intrusion zone.

Step 1. Click **Personnel** > **People**.
The People view opens.

Step 2. If the table numbers hundreds or thousands of records, filter the data by name, department, or tenant.

Step 3. Locate the person's record, double-click the row in the table, and click the Person tab.
The edit view for the person opens.

Step 4. Enter a `PIN` number and confirm it by entering it again.

Step 5. To update the personnel record, click the **Save** button.

Assigning an access right to a person

Personnel may be in the system database without an assigned access right or badge; however, personnel may not gain access at a reader-equipped door until they are assigned an access right.

Prerequisites:
You are continuing the process of creating a new person, or you are editing an existing person and have already double-clicked the person's name in the People view.

Step 1. Click the Access Rights tab.
The Access Rights discovery view opens.

Step 2. Click the Assign Mode button ( ).
The system populates the Unassigned pane with the available access rights and changes the button to indicate that assign mode is on ( ).

Step 3. In the Unassigned pane, select an access right to assign to the new person, and click the Assign button ( ).
The system assigns the access right to the person by moving it from the Unassigned pane to the Newly Assigned pane.

Step 4. To update the person's record in the database, click the **Save** button at the top of the view.
The Summary tabopens with a summary of the person's properties.

Changing the date an access right becomes effective

The effective date applies only to a single access right as assigned to a specific person. This procedure describes how to change assignment properties starting from the Access Right view. You may perform similar starting from the Add New (or edit) Person view.

Step 1. From the main menu, click **Personnel** > **Access Rights**.
The Access Rights view opens.

Step 2. Double-click on the access right entry to edit.
The Summary tab for the existing access right opens.

Step 3. Select the People tab and highlight the person whose access right effective date you want to change.

Step 4. In the **toolbar** menu, click the **Change Assignment Properties** button.
The Change Assignment Properties window opens.

Step 5. Set the properties: **`Start Date`**, **`End Date`**, and **`Assigned Threat Level`**, and click **Ok**.

Step 6. To update the database, click the **Save** button.
The access right effective date is changed for the person.

Easy Lobby visitor management

For systems with integrated visitor management, such as that provided by Easy Lobby, the visitor management system manages visitor entry and exit. The system automatically adds people when the visitor management system checks them in, and automatically deletes or disables them when they visitor management system checks them out or when their authorized visit expires.
A delay between the time the visitor management system checks visitors in or out, and when the information is

available to the system is to be expected. This delay is usually about 30 seconds. Some configuration options, such as how long it takes to communicate the information from Easy Lobby to the system, require admin access to Workbench to configure.

For specific procedures that document how to check in a single visitor, multiple visitors, and repeat visitors refer to the visitor management system documentation. For Easy Lobby, this would be the *Easy Lobby SVM Installation, Administration, and User Guide*.

Chapter 2. Badge tasks

The topics in this chapter explain how to create badges, add badge records to the database and assign them to personnel.
You may assign a badge that is not yet in the system to a person, create a record for new badges by scanning them at a card reader, and assign an existing badge. Create a badge template under photoId Network. You can have any number of templates organized by tenant (category). The system matches template data to the personnel database. The file creation date serves as the capture date for each photograph.

Creating a single badge (manual entry)

Manually entering a badge should be done when you need to create only one badge.

Prerequisites:
You are working at the Supervisor station with admin privileges.

Step 1. Select **Personnel** > **Badges**.
The Badges view opens.

Step 2. Click the Add button ( ).
The Add New Badge view opens.

Step 3. Complete the properties and click the **Save** button.
The system saves the badge and opens the Edit Existing Badges view, Summary tab.

Step 4. Make any additional edits and click the**Save** button.

Creating multiple badges (batch-create)

You can create a group of badges that have common properties.

Prerequisites:
You are working at the Supervisor station.

Step 1. From the system's home view, select **Personnel** > **Badges**.
The Badges view opens.

Step 2. Click the Batch Enroll button ( ).
The Batch Enroll Badges view opens.

Step 3. Complete the properties that are to be shared for all badges scanned, including **`Description`**, **`Wiegand Format`**, **`Status`**, **`Issue Date`**, **`Expiration Date`**, **`Owner`**, **`Tenant`**, and **`Enrollment Reader`**.

Step 4. Swipe a set of cards (a batch) one at a time.
As you swipe each card, the card data displays in the **`New Badges`** property.

NOTE: If badge numbers do not appear, the corresponding Wiegand format has not been defined.

Step 5. To complete the batch-badge creation process, click the **Save** button.
The system saves the badges, and opens the Edit Badges view. The new badges appear in the table of badges.

Manually assigning a new badge

This procedure describes how to assign a badge that is not already created (new badge), without using the reader to scan it in.

Prerequisites:
You are working at the Supervisor or badge creation station with admin privileges.

Step 1. Select **Personnel**.
The People view opens.

Step 2. Select the person record that the badge is to be assigned to and click the Hyperlink button ( ).
The edit view for the person opens with the person's name at the top of the view.

Step 3. Select the Badges tab and click the **Assign New Badge** button.
The Add New Badge view opens. This tab is the active tab, by default, when the view initially opens. The tab includes the following properties to enter or choose information that applies to the new badge record:

Step 4. Fill in the properties.

Step 5. To assign the new badge with the current settings, click the **Save** button.
The system assigns the badge to the person and displays the new badge in the edit existing badge view.

Enrolling from a reader to assign a new badge

This procedure describes how to assign a badge that is not already created (a new badge), using a reader to scan it in.

Prerequisites:
You are working at the Supervisor station.

Step 1. Select **Personnel**.
The People view opens.

Step 2. Select the personnel record that the badge is to be assigned to and click the Hyperlink button ( ).
The Edit Person view opens with the person name at the top of the view.

Step 3. Select theBadges tab and click the **Enroll New Badge** button.
The Enroll New Badge view opens.

Step 4. Complete the properties.

NOTE: You have to assign an Enrollment Reader before you can scan a badge to complete some of the properties.

Step 5. Scan the badge at the designated enrollment reader.
The badge Id number appears in the `Scanned Badge` property and one or more format options appear in the format pane.

NOTE: If the badge number does not appear, the corresponding Wiegand format has not been defined.

Step 6. Click the **Save** button.

Step 7. Click the **OK** button to assign the badge.
The badge is assigned to the person and the new badge displays in the Edit Existing Badge view.

Assigning an existing badge

A badge is required at most facilities to enter and exit buildings. This procedure describes how to assign a badge that is already created (existing badge), without using the reader to scan it in.

Prerequisites:
You are working at the Supervisor station with admin privileges. The badge to assign to the person exists in the database. You just created the new person record and are continuing with setting up the new person or

you are editing an existing person and have already double-clicked the person’s name in the People view.

Step 1. Click the Badges tab.
The Badges discovery view opens.

Step 2. Click the Assign Mode button ( ).
The system populates the Unassigned pane with all available unassigned badges.

Step 3. Select the badge to assign to the person and click the Assign button ( ).
The system assigns the badge to the person by moving it from the Unassigned pane to the Newly Assigned pane.

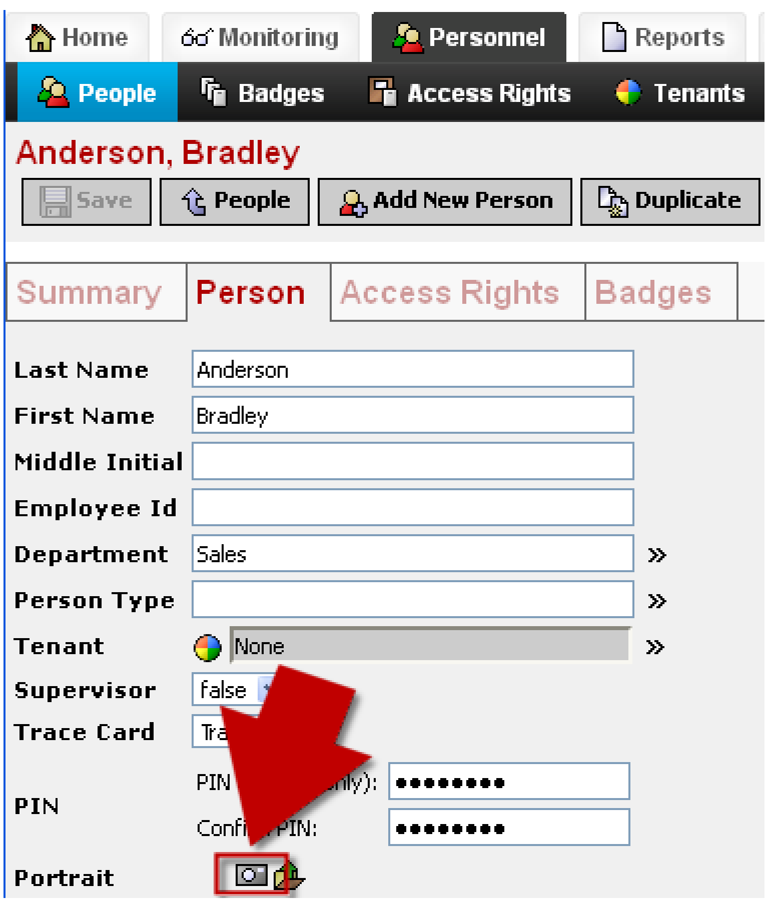
Step 4. To update the person’s record in the database, click the **Save** button at the top of the view.
The Summary tab opens with a summary of the properties you just updated.

Capturing a photo and associating it with a person

You may capture a photo using a portrait camera connected to the Photo ID station, or use any photo taken by any camera and located anywhere as long as it is stored as a .jpg or .png file.

Prerequisites:
The browser used to run the system must be running in the Photo ID station to which the USB portrait camera is connected.

Step 1. From the home view, click **Personnel** > **People**, double-click a person’s row in the table, and click the Person tab.
The Person view opens.



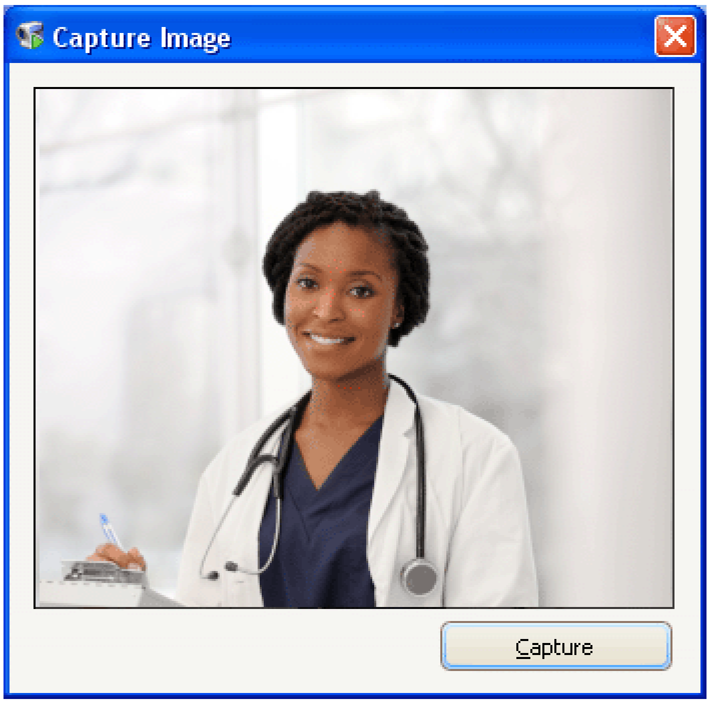
Step 2. At the bottom of the view, click the capture icon ( ).

NOTE: If you do not have a **capture** button, check for the native badge design device added under the photo ID network that needs to be added to the station.

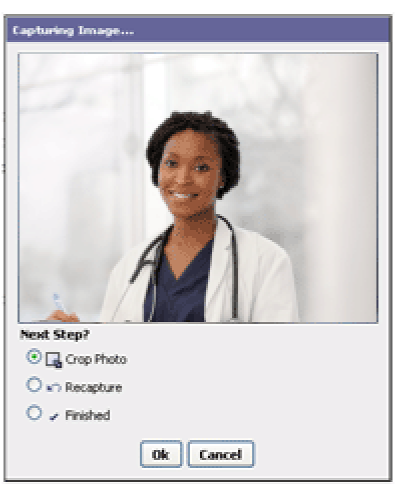
A waiting-for-capture window opens.

Step 3. If you have more than one Photo ID station, the software asks you which Photo ID station you are using.

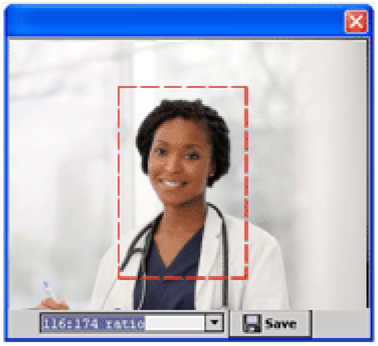
Step 4. Select the station and click **OK**.
The Capture Image window opens.



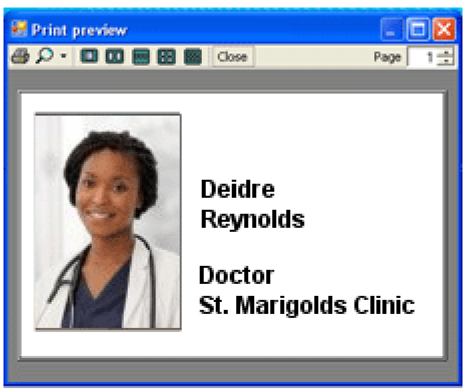
Step 5. Focus the image and click the **Capture** button.
The **Next Step** window opens.



Step 6. To crop the photo, click **OK**.
The crop tool opens.



Step 7. Enter the aspect ratio (width: height) from the template, adjust the crop box and click the **Save** button.
The **Print Preview** window opens.



The system places the photo in the persons portrait section within the database.

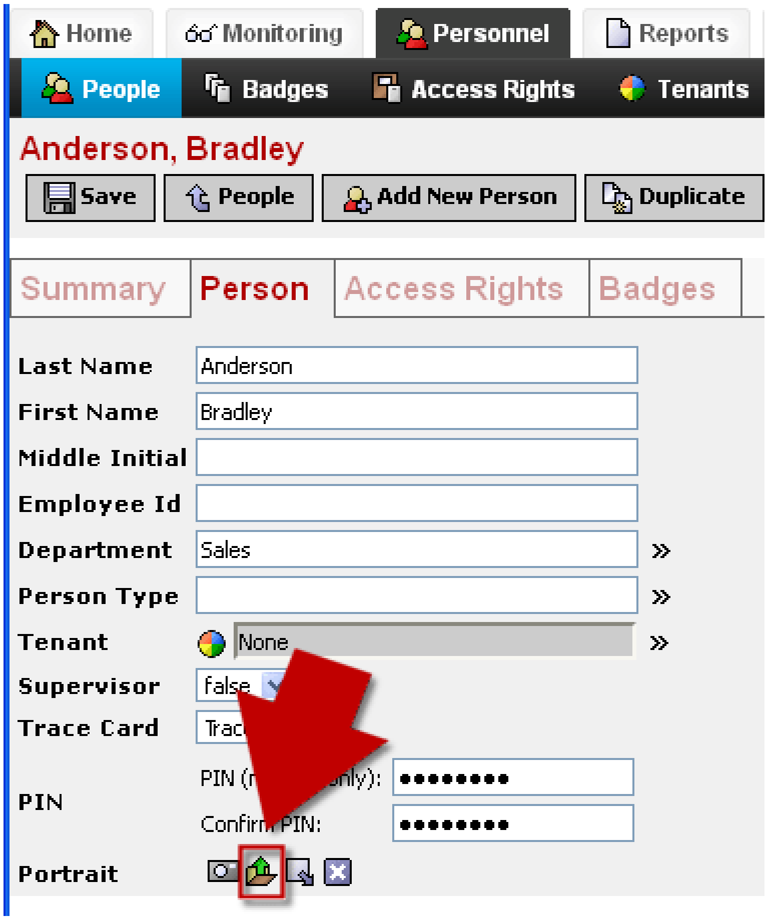
Importing a photo

This procedure allows you to use an existing photo on a badge.

Prerequisites:
Before you can import a photo, the person must exist in the database.

Step 1. From the home view, click **Personnel** > **People**, double-click a person's row in the table, and click the Person tab.

The **Person** view opens.



NOTE: If file open icon is not available, create and save the person first.

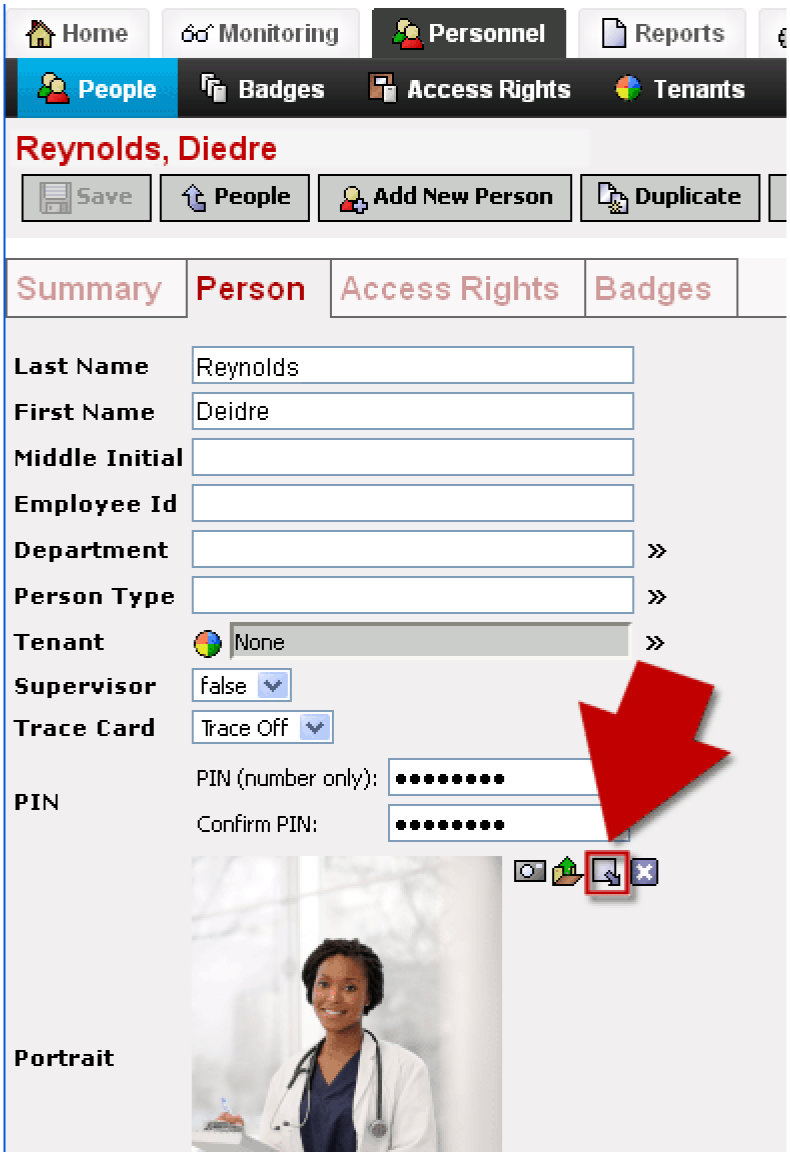
Step 2. Click the File Open icon ( ), browse for the photo file and click the **Save** button.

Cropping a photo

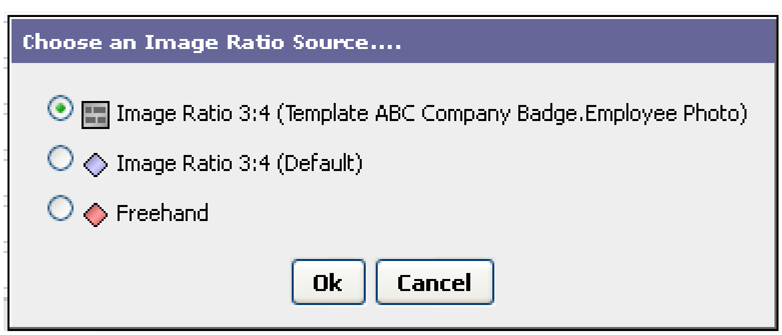
Use this procedure to crop a captured or uploaded photo.

Step 1. From the home view, click **Personnel** > **Person**.

The Person view opens.



Step 2. Click the Crop Image icon ( ).
The Choose an **Image Ratio Source....** window opens.



Step 3. Choose one of the following :

- **Image Ratio** width: height (template name) where:
  - width is the width as defined by the template.
  - height is the height as defined by the template.
  - templatename is the name of the template.
- **Image Ratio** width: height (default) where:
  - width is the default width.
  - height is the default height.
- **Freehand** lets you use the freehand tool alone to crop the image.

  NOTE: Although this may seem the easiest way to crop the photo, it may result in a distorted image. The best option is to use the aspect ratio as defined in the template.

  The photo capture window opens with a cropping box set to the largest size possible.

Step 4. Grab any corner or edge and drag the cropping box smaller, then click and drag the center of the cropping box to move it to the desired position.

Step 5. When the cropping box is centered over the face, click the **Save** button.

The photo is cropped to the smaller size while maintaining the aspect ratio.

Step 6. Click **OK** and click the **Save** button.

Printing badges

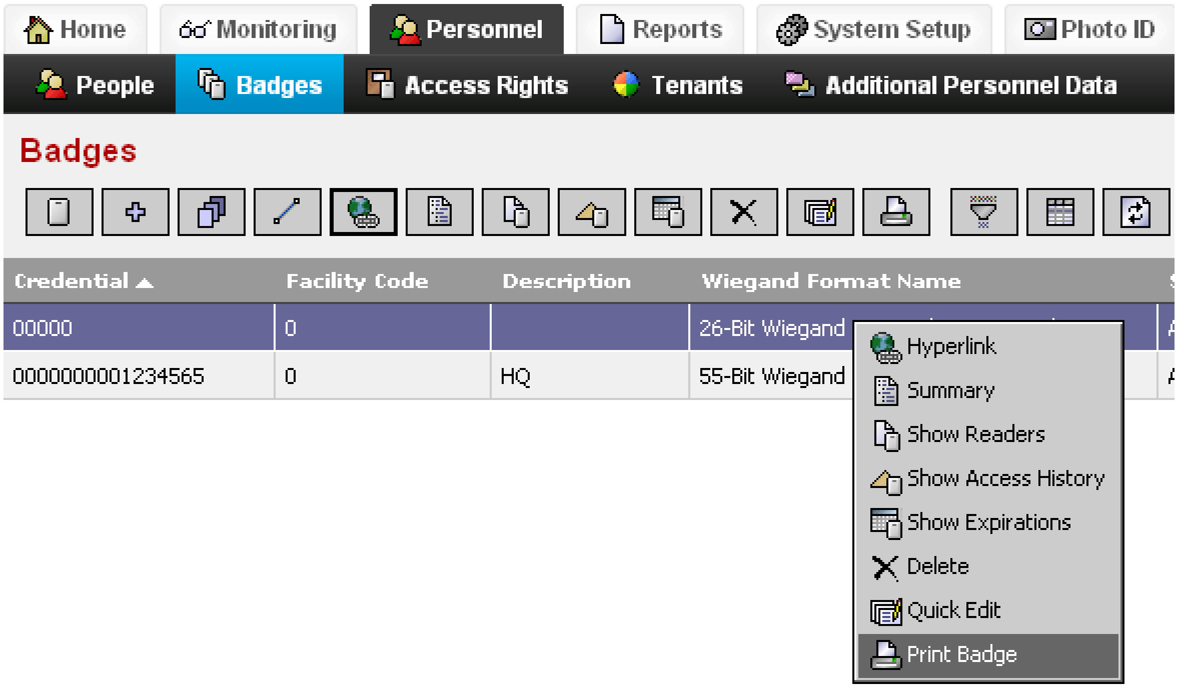
This procedure explains how to print one badge or a group of badges.

Prerequisites:
To print a dual-sided badge you follow the same procedure. A dual-sided template and printer capable of printing on both sides are required.

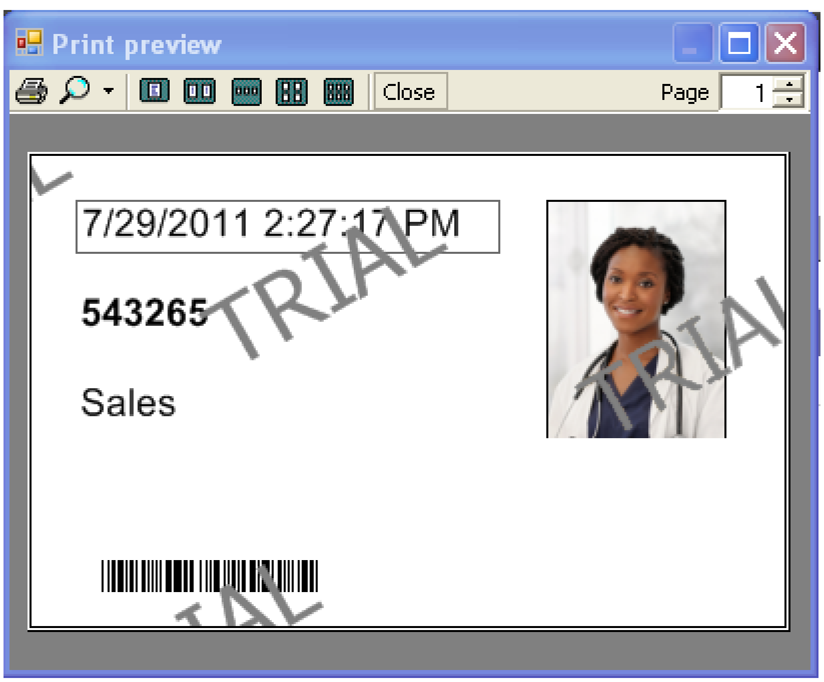
Step 1. Beginning from the home view, click **Personnel** > **Badges**.

Step 2. Select the badge(s) to print, right-click and click **Print Badge**. You can also click the **Print Badge** button.

The action drop-down list opens.



The **Print Preview** view opens.



NOTE: When more than one badge is selected, you can use the **Print Badge** button to skip the **Print Preview** and print all selected badges in one print operation.

Step 3. Click the print icon ( ).
The badge prints.

Badge creation troubleshooting

This topic identifies some technical issues and provides an explanation.

- **There is no capture button/icon on my Person view.** The capture icon ( ) requires a native badge design device is added under the photo ID network be added to the station. If you see no capture button, your system has not been configured yet for the Photo ID feature.
- **I can't find the window I'm expecting to see.** Temporarily minimize your browser or other windows to see if the window is behind.
- **I cannot upload a photo to the database.** For you to upload a photo, the person must already exist in the database. Create and save the person, and then the upload icon will be available.

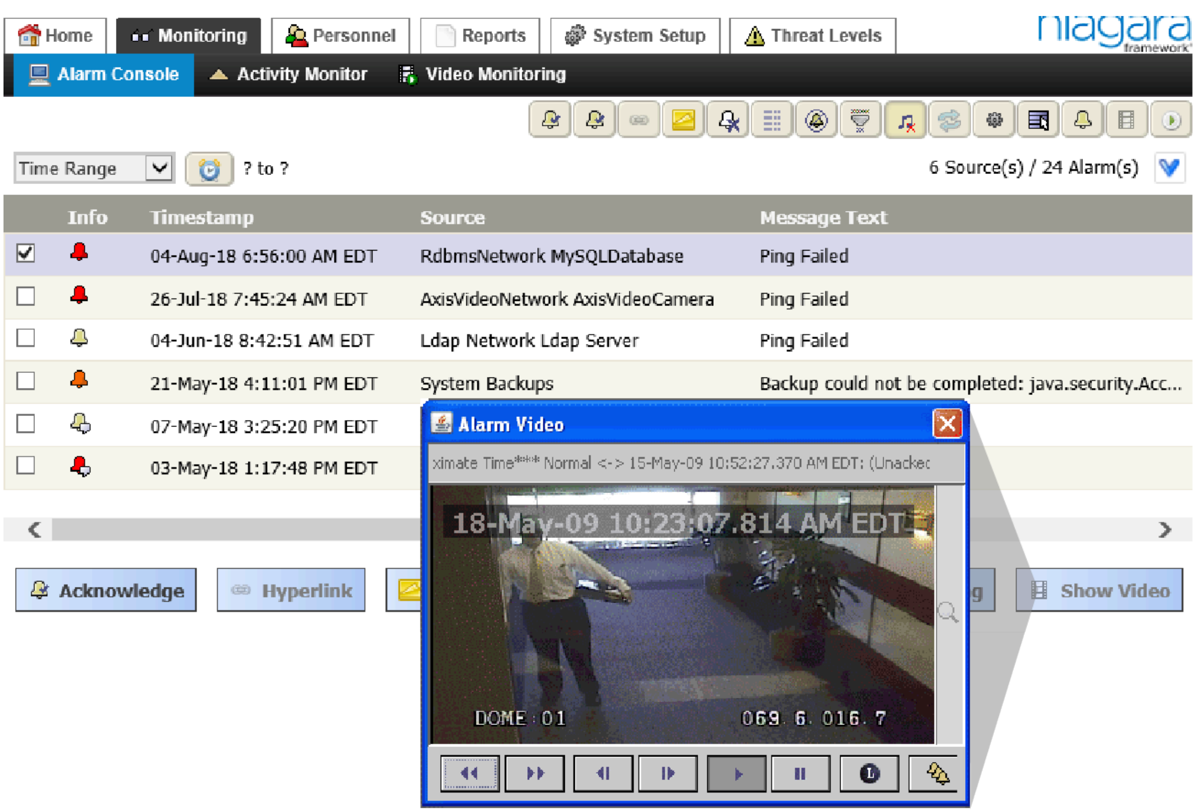
Chapter 3. Alarm tasks

Monitoring includes using cameras to view entries and exits as well as managing the alarm console. Alarm consoles are sometimes called alarm console recipients. The term indicates that an alarm console receives the alarms, as opposed to another type of recipient, such as an email recipient. You can create one or more alarm consoles and associate one or more alarm classes with it. Consoles are listed in the Alarm Consoles view, which you can display by clicking on the **Console List** button in the top right corner of the Alarm Console view.

Viewing alarms

The alarm console displays the currently-active alarms. The system automatically updates it with new alarms as they occur.

Step 1. From the main menu, click **Monitoring**.
The default Alarm Console view opens.



Each row (record) in this table represents a single alarm source and one or more alarms from that source.

Step 2. To acknowledge an alarm, select the alarm and click the Acknowledge-the-selected-alarm(s) button ( )

Step 3. To add a note about an alarm, click the Add-notes-to-the-selected-alarm(s) button ( ).

Step 4. To filter the alarms so only specific alarms appear in the table, click the Filter alarms button ( ), fill in the properties, and click **OK**.

Next steps

There are other options to explore on the alarm console.

Alarm Console Info icons

These icons appear under the Info column in the alarm console. Color coding and symbolic images represent the state of each alarm.

- A red alarm icon in the table indicates that the current state of the alarm source is offnormal and not acknowledged.
- An orange alarm icon in the table indicates that the current state of the alarm source is alert and is not acknowledged.
- A yellow alarm (gold) icon in the table indicates that the current state of the alarm source is offnormal but is acknowledged.
- A green alarm icon in the table indicates that the current state of the alarm source is normal and not acknowledged.
- A white alarm icon in the alarm history table indicates that the current state of the alarm source is normal and acknowledged.
- A note alarm icon (it may be any color) in the table indicates that there is a note associated with the alarm.
- A link icon in the table indicates that the alarm has a link associated with it. When an alarm displays this icon, the **Hyperlink** button is also active.
- A video alarm icon may display if video is available with the associated alarm. If included, this graphic appears at the left end of the alarm record row.
- An optional icon may display if it is setup in the alarm properties. If included, this graphic appears at the left end of the alarm record row.

Silencing an alarm

Once an audible alarm has sounded, you may choose to silence it as you work to correct the problem.

Step 1. To view the alarm console, click the **Monitoring** tab.
This opens the Alarm Console view.

Step 2. Select the alarm(s) to silence (to select multiple alarms, use the **Shift** or **Ctrl** keys).

Step 3. Click the **Silence** button ( ).
The system silences the audio alert for the current session.

NOTE: A silenced alarm sounds again when the screen is refreshed. This includes any time you use the **Filter** button ( ) to reduce the number of alarms in the view.

Step 4.

Viewing alarm details

Alarm details can provide additional information and specific instructions for how to handle the alarm condition.

Step 1. From the main menu, click **Monitoring**.
The default Alarm Console view opens.

Step 2. To view all the alarms from a particular point, click the **Show Recurring** button.
The Show Recurring view shows only the alarms for the selected point.

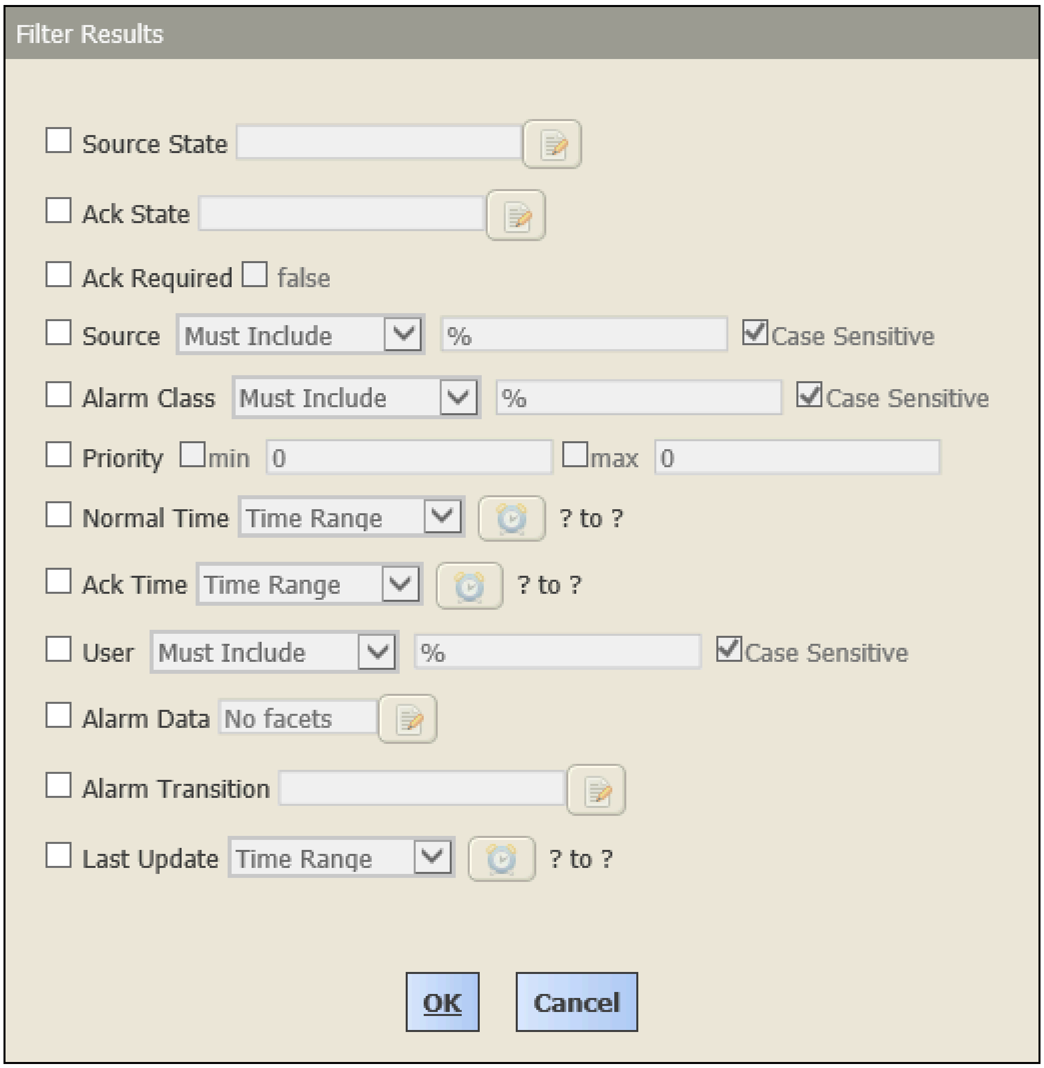
Step 3. To view additional details about a specific alarm, right-click on an alarm record and click **Alarm Details** from the popup menu.
The details window opens.

Filtering alarms

Tabular information can provide an overwhelming number of records. Filtering to display only the records that interest you is an important system skill. The filtering principle used with alarms is the same for other tables.

Prerequisites:
You have a table, such as an alarm console, open.

Step 1. Click the Filter button ( ) at the top of the view.
The alarm **Filter** window opens.

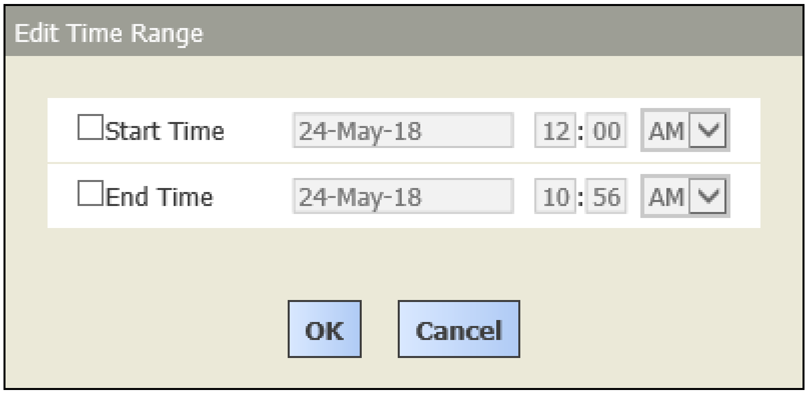


This window is context sensitive so that the available filtering controls reflect only the names and data of the columns in the currently active table view. For example, the **Filter Results** window contains time ranges only for tables that have a Timestamp column. You can configure filter properties by themselves or in combination. Be as precise as you can when filtering records stored in a large database. Alarm and other data grow quickly. If a query generates a table larger than 5,000 records, a message alerts you that only the first 5,000 are available for viewing.

The `Last Update` time controls the Timestamp column in the table.

Step 2. To select records by Timestamp, enable the `Last Update` property (a check mark appears to the left of the property) and click the Edit Time Range button ( ).

The **Time Picker** window opens.



Step 3. To change the time, enable the **Start Time** and **End Time** properties and click in each date field. A calendar opens.

Step 4. Select the date and click **OK**.
The system displays records that fall in a period that starts with **Start Time** and ends with **End Time**. To start at 12 am on a specific date, you will notice that the **Start Time** shown in the **Filter Results** window is the day before. In other words, the system considers midnight to be a pm time.

Step 5. Configure a wildcard for text properties, such as: **Source**, **Alarm Class**, and **User** to equal, include, not equal or not include records.

Step 6. Set any other properties for limiting the number of visible alarms and click **OK**.
The **Filters** window closes, the alarm console view includes only those alarms that meet the specifications defined by the filter, and the Filter button ( ) changes colors.

Step 7. To reset the filter, click the Filter button, click to remove the check mark(s) that identify the filter criteria and click **OK**.

CAUTION: Filter settings do not reset automatically when you leave the **Alarm Console** view. Failure to clear the alarm filter settings causes the filters to continue to hide (or filter) alarms, which do not appear in the alarm console until you clear the filter settings.

Acknowledging alarms

This procedure documents how to acknowledge an alarm in the **Alarm Console** view. You can acknowledge a selected alarm in this view, the **Open Alarm Source** window, and the **Alarm Record** window.

Prerequisites:
The system user is configured with **Notes Required on Ack** set to `true`.

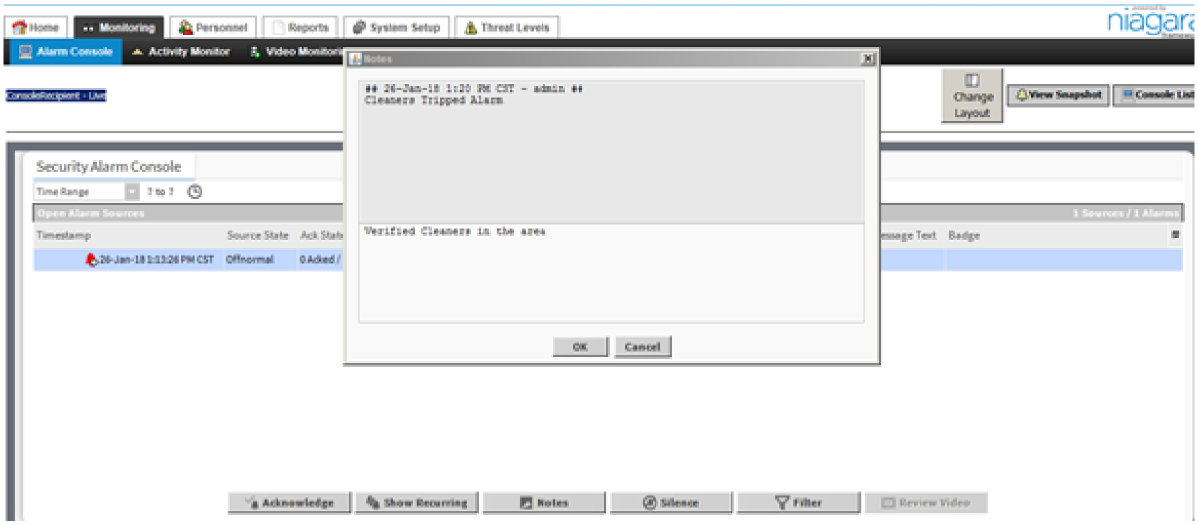
Step 1. To view the Alarm Console, click **Monitoring**.
The Alarm Console view opens with all alarm sources displayed. Each record in the table represents one alarm source and one or more alarms from that source.

Step 2. Select one or more alarm sources to acknowledge.
To select multiple alarms, use the **Shift** or **Ctrl** key.

Step 3. Do one of the following:

- To acknowledge all alarms associated with the selected alarm source(s), click the **Acknowledge** button ( ).
- To acknowledge only the most recent alarm, right-click on the selected alarm(s) and click **Acknowledge Most Recent** from the popup menu.

The **Notes** window opens.



The **Notes** window pops up automatically provided the **`Notes Required on Ack`** property on the system user is set to `true`. If a note already exists for the alarm, the system displays it.

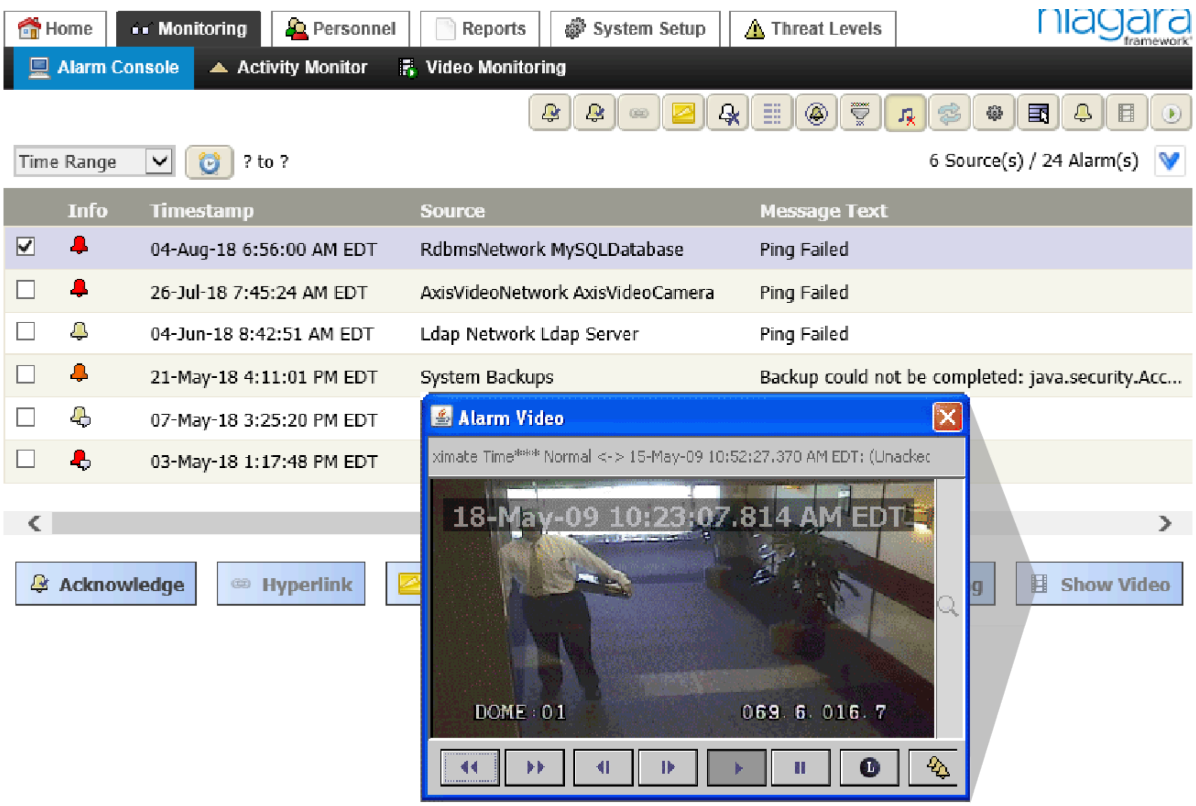
Step 4. Enter a note related to the alarm(s) and click **Ok**.
The system acknowledges the selected alarm by changing the Info icon. An acknowledged alarm displays this Info icon: . A small bubble added to the icon indicates a note.

Adding alarm notes

You add alarm notes when an alarm is acknowledged or by selecting the alarm and clicking on the **Notes** button.

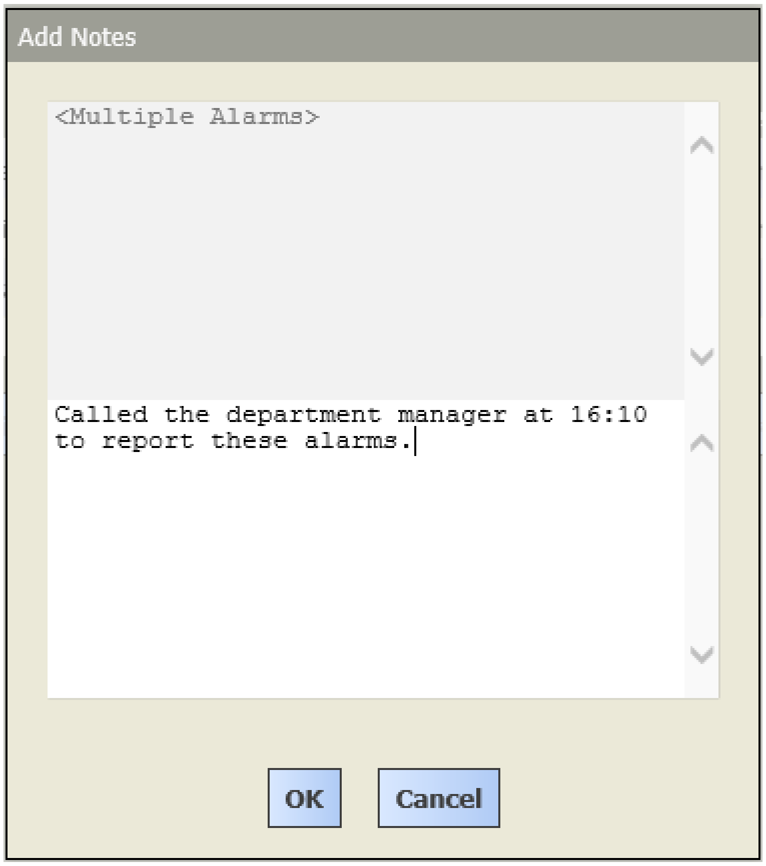
Step 1. To open the Alarm Console, click Monitoring.

The Alarm Console opens.



Step 2. Select the alarm to which you wish to add a note and click the **Notes** button.

The **Notes** window opens.



Step 3. Enter the note text and click the **Add Note** button.
The system adds the note to the alarm and changes the Info icon to include a conversation bubble.

Viewing alarm notes

This procedure documents how to view notes associated with an alarm.

Step 1. Open the alarm console.

Step 2. Select the alarm and click the **Notes** button.
The **Notes** window opens.

Step 3. Read the previously entered note.

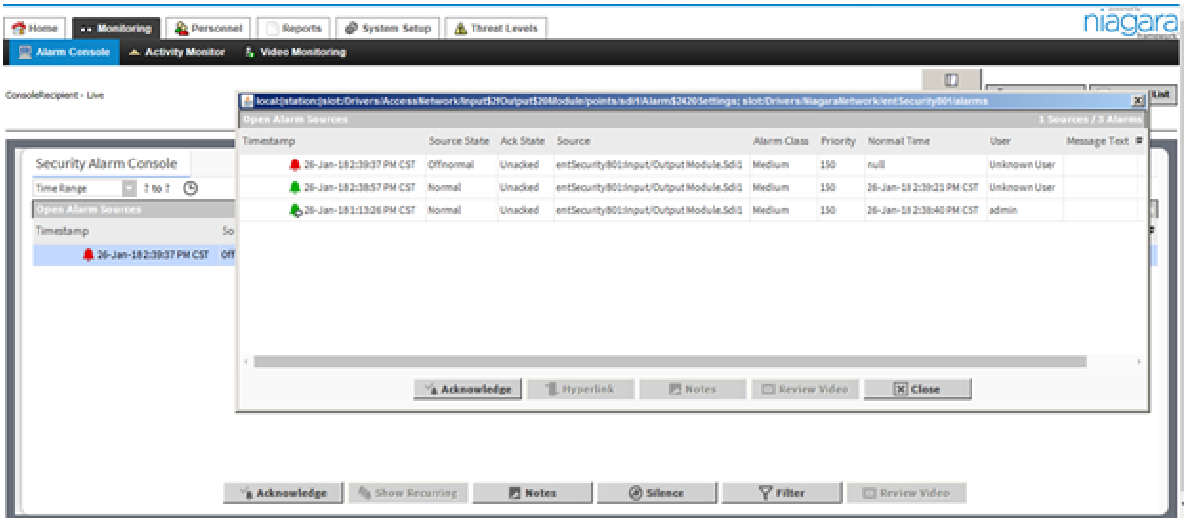
Step 4. To add a new note, enter the text and click **Add Note**.

Viewing alarm records and sources

The console allows you to easily view more information about an alarm as well as view alarm history. The source of the alarm provides clues to what is going wrong.

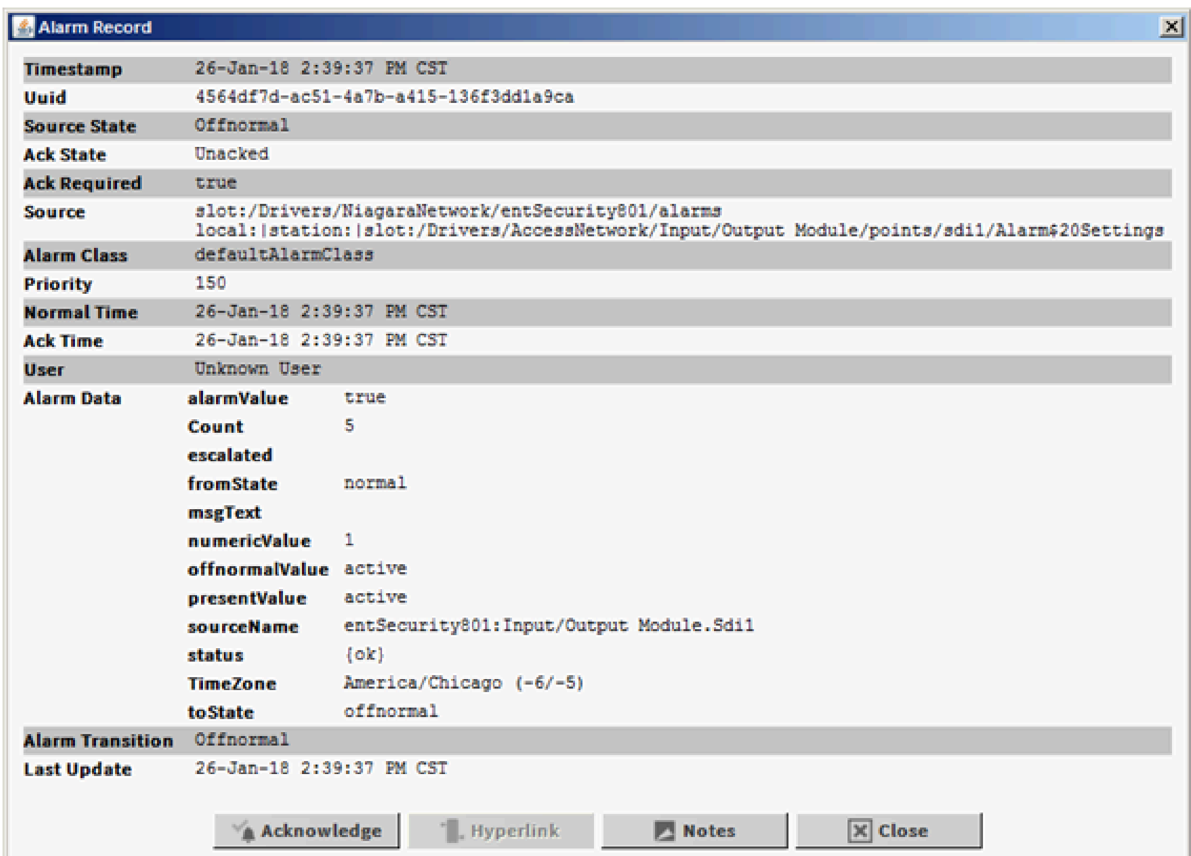
Step 1. From the Alarm Console view, double-click the alarm row in the console table.

The **Open Alarm Sources** window opens.



This window displays a history of when the alarm occurred, and how many times it occurred.

Step 2. Double-click one of the sources in the pop-up window.
The **Alarm Record** window opens.



This window provides additional information regarding the alarm.

Step 3. When you finish viewing properties, click the **Close** button in all open windows.

Step 4. To acknowledge the alarm, click **Acknowledge.**

Chapter 4. Report tasks

Reports provide information that you can use to manage the system. You can filter these reports to provide just the information that you need.

Reports to use daily or weekly

- Attendance History displays a table of badge transactions with arrival and departure times.
- Personnel Changes report documents each personnel record that changed during the selected period.

Occasional reports

- Access History reports all access activity for the selected period.
- Alarm History reports selected alarms.
- Person Access Right report shows each person and their associated access right(s).

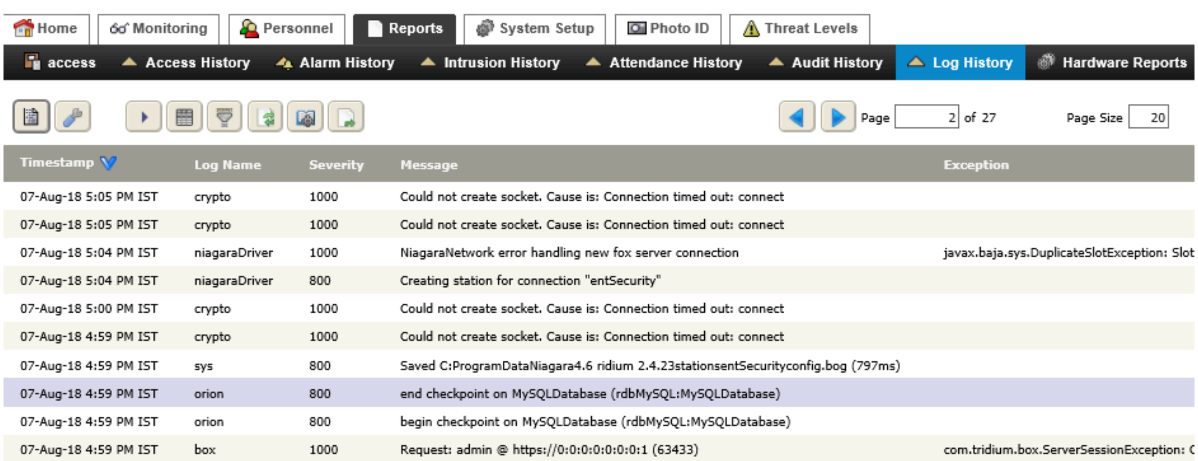
Viewing a report

A default report is one that is available under the **`Reports`** menu in the navigation tree. Custom reports may appear anywhere in the menu hierarchy.

Step 1. Do one of the following:

- To view a default report, from the Home view, click **`Reports`**, and click a report name, such as **`Alarm History`**, Audit History, etc.
- To view a custom report, navigate to the report and click its name in the menu structure.

Hardware Reports and Miscellaneous Reports are further organized into report sub-groups.
The report table opens.

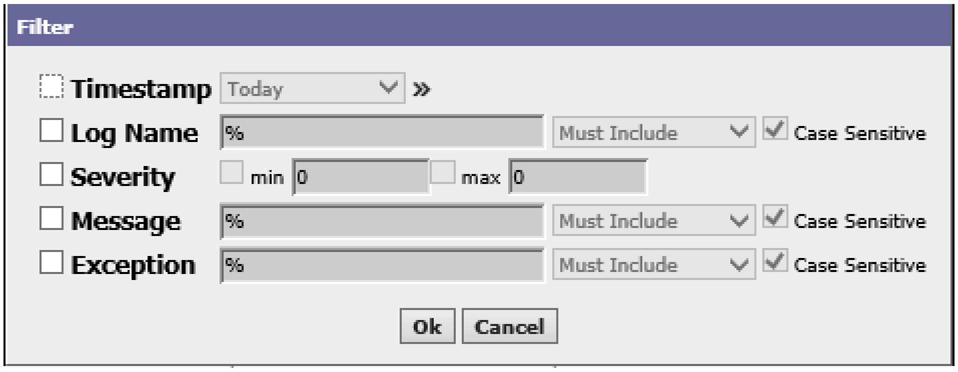


The example is of the Log History report table.

Step 2. If the report contains more than one page, navigate to the additional pages.

Step 3. To filter the report, click the Filter button ( ).

The **Filter** window opens.

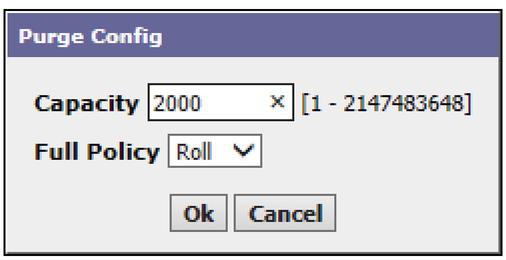


The screen capture above is for log history. Each report provides a different set of filter criteria.

Step 4. Select and define the filter criteria and click **Ok**.

Step 5. To print the report, click the Export button ( ), select `PDF` for **`File Type`** and click **Ok**.
The system creates a PDF, which you can use to create a hard copy.

Step 6. If the report contains a large number of records, only a few of which are needed, click the Purge Config button.
The **Purge Config** window opens.



Step 7. Define the **`Capacity`** and **`Full Policy`** and click **Ok**.
The system removes the records that exceed the defined capacity from the database.

Printing a report

To print a report you first create a PDF and then print the PDF. Creating a PDF is an export function.

Step 1. Open the view that contains the records to export.

Step 2. Optionally, filter the table so that only the records to export are visible.

Step 3. Click the Export button ( ).
The **Export** window opens.

Step 4. Select an **`Export Range`** and click **Ok**.
The system opens a file chooser window.

Step 5. Define a PDF file name and click **Ok**.

Step 6. Open the PDF and print it.