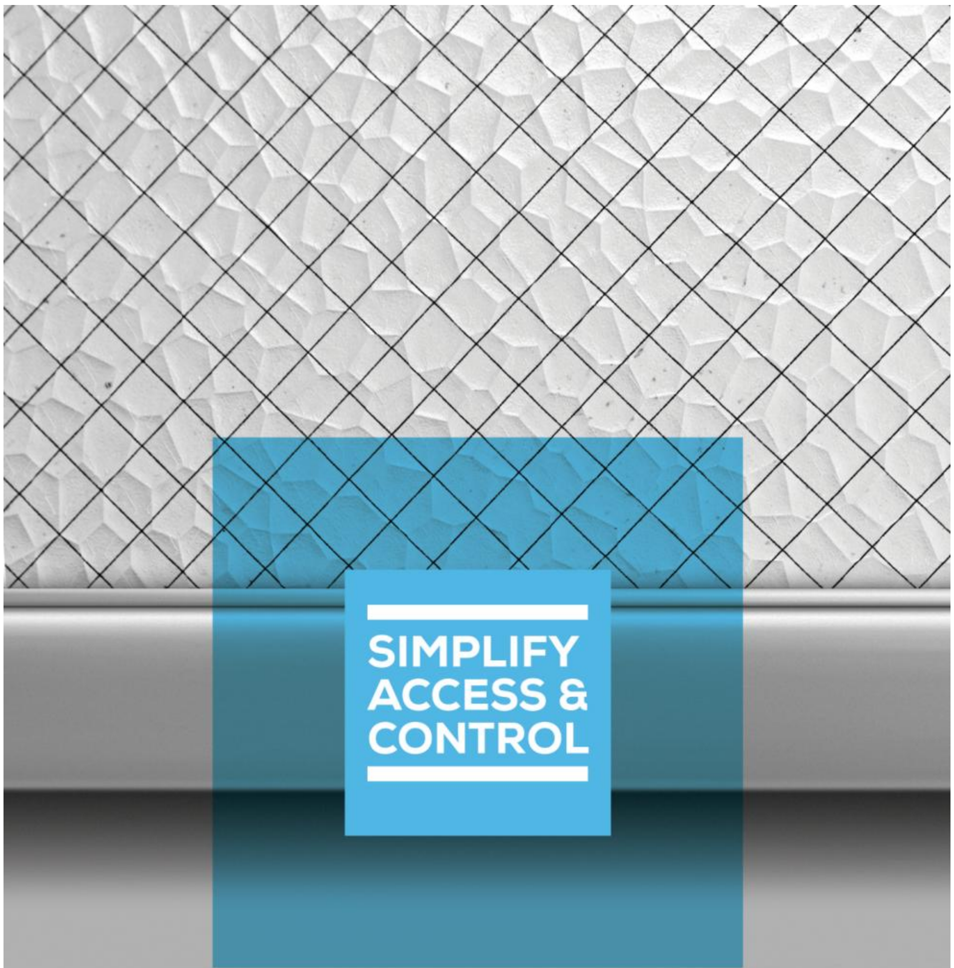

Intelli–Site Lite 4.2

Security Management Software

Quick Start Guide

Intelli–Site Lite 4.2

Security Management Software

Quick Start Guide

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Technical support is available via telephone or email. Contact Technical Support 8:00 AM to 5:00 PM Central Standard time. When calling after hours, please leave a detailed voice mail message, and someone will return your call as soon as possible.

Email: support@ossi-usa.com

When calling, please be at the computer prepared to provide the following information:

- Product version number, found by selecting the **About** button from the Intelli–Site Lite Application Menu.
- The type of computer being used, including operating system, processor type, speed, amount of memory, type of display, etc.
- Exact wording of any message that appears on the screen.
- What was occurring when the problem was detected?
- What steps have been taken to reproduce the problem?
- It is highly recommended that the user generate a support package for transmission to Intelli–Site technical support staff. To generate the package, run the Intelli–Site Lite Configuration Utility. *Create Support Package…* is the last option in the **Tools** menu.

Table of Contents

Introduction

Intelli–Site Lite makes the day-to-day use of a facility's various security systems seem as if they were always meant to work together. There is some project programming that is required. This guide walks you through basic access control project programming. It covers:

- The Intelli–Site Lite Services
- Project Programming including:
  - Setup Backup
  - Adding Hardware (Panels)
  - Defining Access Sets
  - Adding Personnel and Tokens (Cards)
  - Assigning Access Sets
  - Downloading the Project to field devices

The Intelli–Site Lite Services

The components of Intelli–Site Lite are Windows Services. Those components are the Intelli–Site Engine, the Intelli–Site Driver, and the Intelli–Site Web Service. There is a fourth optional component, the Client Manager Service. See Software Components for an in-depth discussion of each component.

Each of the services can be installed on different computers. In fact, in larger installations, there may be multiple Driver Services though there can be only one Engine.

To verify the services are running, open the Intelli–Site Configuration Utility on the host computer for each service. It can be found at **`-> Intelli–Site -> Intelli–Site Configuration Utility`** or a shortcut may have been placed on the Desktop.

Figure 1 - Configuration Utility shortcut icon

Because the Configuration Utility starts and stops services, it requires administrator-level permission. A **User Account Control** dialog will appear to allow the Configuration Utility to make changes to this computer. Select **Yes**.

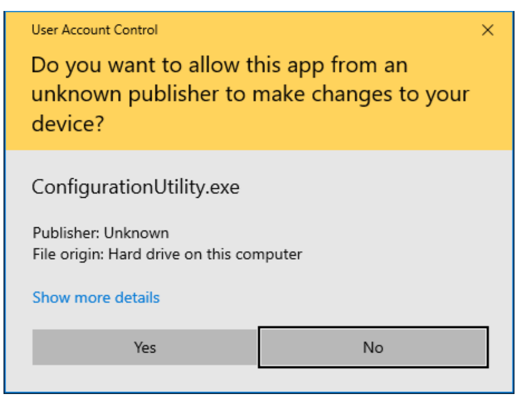


Figure 2 - UAC Dialog for the Configuration Utility

The Configuration Utility will display its main window. Verify the desired components are running. The text in the Service Control group will inform you which services are running, and which are not. At the very least, the Engine and the Driver Service components must be running. Normally, the installation process will set the installed services to start automatically. But if a required service is not running, click the button to start it.

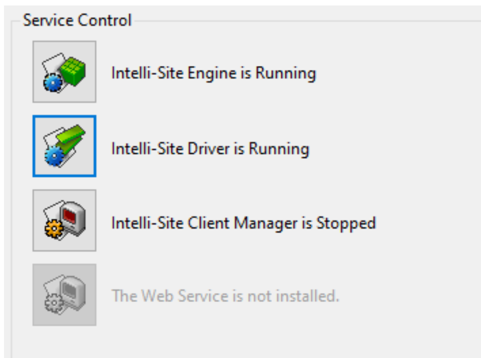


Figure 3 - Configuration Utility: Service Control group

The Desktop Client

The Desktop Client is a traditional software client. It is installed by default on the computer that hosts the Engine when the Engine is installed. It provides a variety of Views that aggregate functionality to make it easier for the User to complete his objectives. Need to manage hardware such as panels or cameras? Go to **Hardware Management View**! Need to manage personnel, grant or modify access rights? Go to **Access Management View**! Need to generate a report? That's right, there's a View for reports as well.

As we program the project in this Quick Start Guide, we will use the **Hardware Management View** and the **Access Management View**.

Project Programming

After Intelli–Site Lite has been installed, you can begin programming the Intelli–Site Lite project.

Before you begin, it is strongly suggested you gather a list of all the hardware in your facility and their addresses. Get a list of the personnel that will have access to the facility and the card numbers they've been assigned. Get a copy of the company holidays. Also, put some thought into the access rights the personnel will have. Do you have first, second, and third shifts? Does anyone require 24/7 access? What about nights and weekends? Holidays? Will some doors or access points be used only by some of the personnel and not others? Putting thought into how the system will be used ahead of time will make project programming much simpler.

The example installation used in this Quick Start Guide contains the following:

- 1 Compass IRM Panel
    - 2 Doors each with an exterior card reader and an interior REX (Request for Exit)
- Personnel
    - 1 Owner
    - 1 Personal Assistant
    - 2 Programmers
    - 1 QA
    - 2 Tech Support
    - 1 Receptionist
    - A Janitorial Service
- Standard Holidays
    - Memorial Day
    - Independence Day
    - Labor Day
    - Thanksgiving
    - Winter Shutdown
- Access
    - Owner has 24/7 access
    - Janitorial Service only has access on Saturday mornings from 8:00am to noon
    - Standard access is Monday through Friday, 8:00am to 6:00pm

- Overtime access is Monday through Friday from 6:00pm to midnight and Saturday 8:00am to midnight including all Holidays

We are ready to begin.

Note: Ensure the Engine Service is started via the Configuration Utility before attempting to login.

Logon

On the host computer for the Engine, launch the Desktop Client. It can be found at -> **`Intelli–Site`** -> **`Intelli–Site Desktop Client`**. There is also a shortcut on the Desktop.

The main screen will display along with the Logon dialog.

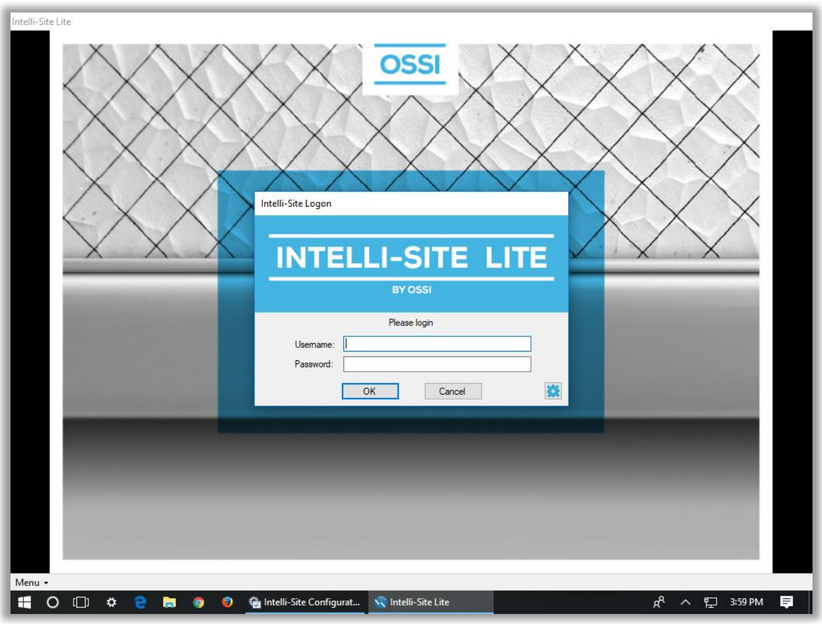


Figure 4 - The Desktop Client with Logon Dialog

Enter "master" in the **Username** field. Enter "m" in the **Password** field. This is the default User Intelli–Site Lite ships with.

Note: The password is case-sensitive. For security reasons, the password for the user "master" should be changed immediately. See section Users.

If the license and SMA have not been activated, you will receive an **Informational** dialog until it has been. See Licensing Intelli–Site. The software has a demo license that allows you to do nearly everything until your license is activated.

The default View is the View used for day-to-day activity and not necessarily the View used to program the project. The first View we need to go to is **Hardware Management View**. This is the View in which Drivers and Panels are added and managed. But the first thing Intelli–Site Lite asks you to do is setup backups.

Setup Backup

Backups are important for any software. They are doubly important for an integrated security and management system. Intelli–Site Lite will pop up a dialog on each logon until regular backup has been configured.

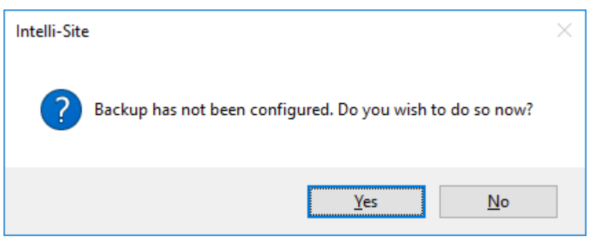


Figure 5 - "Backup has not been configured." Dialog

Clicking opens the properties dialog for the **Setup** node so that backup can be configured. For more information about the **Setup** node, see Setup.

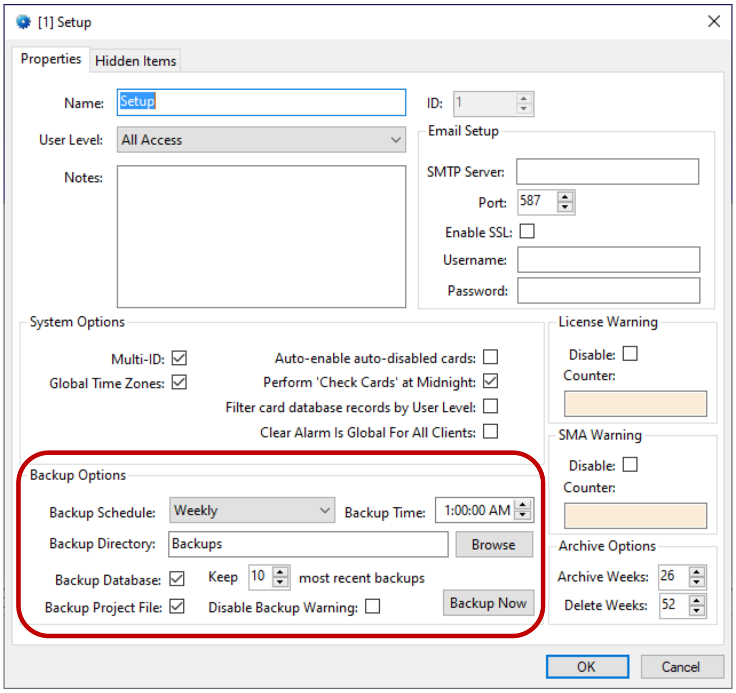


Figure 6 - Setup Properties dialog

Changing any of the fields in the **Backup Options** group satisfies Intelli–Site Lite's backup configuration requirements. Click the OK button to save the changes.

Note: ***It is strongly recommended that the Backup Directory be located on an external system or at the very least an external drive or device. One of the major reasons to perform backups is disaster recovery in case the local hard drive crashes. Backing up to the local machine will not allow you to recover from this most basic disaster.***

Hardware Management

This section explains basic hardware management including:

- Sites
- Areas
- Adding Drivers
- Adding Panels

Hardware is managed in the **Hardware Management View.** If you are not in **Hardware Management View**, click on Menu and select .

Note: The default View for Intelli–Site Lite Lite is Hardware Management View. The default View for Intelli–Site Lite is Live View.

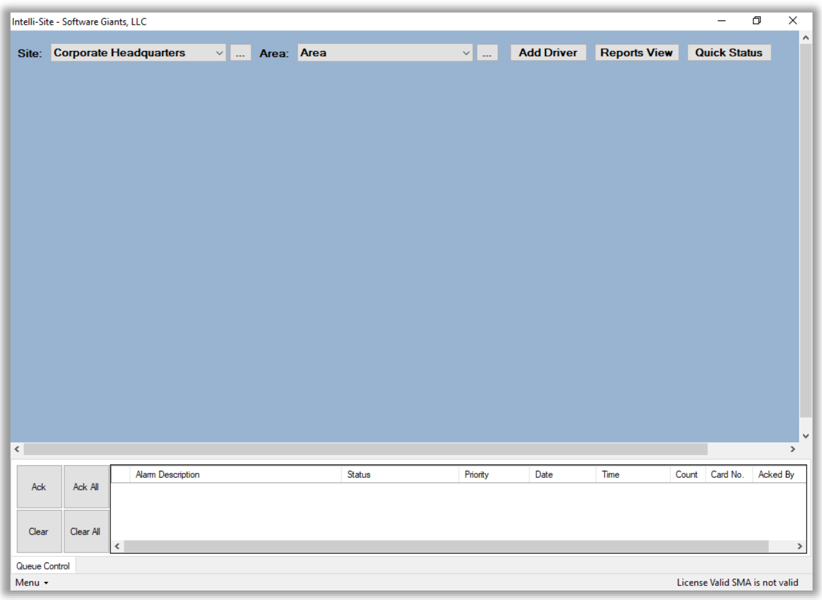


Figure 7 - Hardware Management View

The hardware for any installation is organized by Site and Area in Intelli–Site Lite. How your facility maps into sites and areas depends on you. A multi-occupant building such as a strip mall may have one site and multiple areas. A hospital complex has multiple sites and multiple areas in each site.

The initial Intelli–Site Lite project comes preloaded with one site and one area. They are imaginatively named "Corporate Headquarters" and "Area".

In the example project, there is only one site and one area in that site. They are "Software Giants, LLC" and "The Office". The first step is to change the names of the site and area in the project to reflect the facility.

Site

To change the name of the site, click the ellipsis button to the right of the Site combo box. This opens the Site Ellipsis menu.

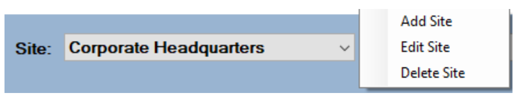


Figure 8 - Site Ellipsis Menu

The menu options are *Add Site*, *Edit Site*, and *Delete Site*. To change the name of the site displayed in the combo box, select *Edit Site*. The **Properties** dialog for the selected site displays.

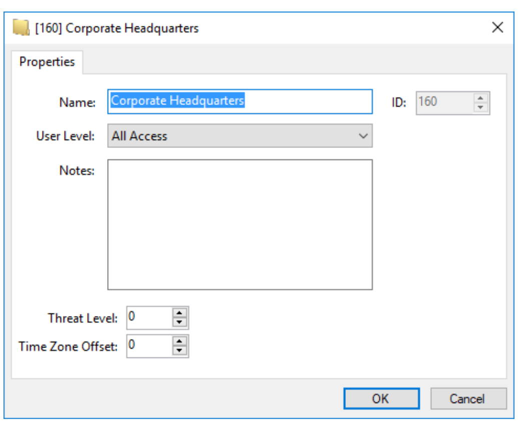


Figure 9 - Site "Corporate Headquarters" Properties dialog

Enter the desired name in the **Name** field. Then click OK. The new name is saved, and the combo box is updated.

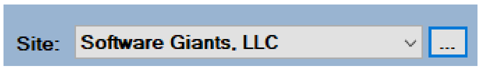


Figure 10 - Site "Software Giants, LLC"

If your project has multiple sites, add each site using the *Add Site* option. When a site is added, the properties dialog for that site is displayed so you can modify the name.

The new site is added to the end of the list. To see the site list, click on the arrow to the right of the drop-down list. The list will drop down.

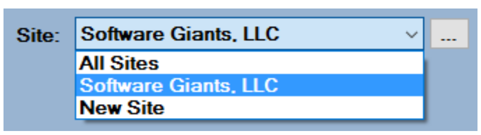


Figure 11 - Example Site dropdown list

In the above figure, there are three entries in the list. We added a second site, ***New Site*** in addition to the site we renamed.

Note: ***The first item in the list is All Sites. The Hardware Management View is used to manage and monitor all hardware in the Intelli–Site Lite system. Therefore, to quickly see all sites, select All Sites from the list. All drivers and panels in the system will display.***

We'll use the *Delete Site* option to delete the ***New Site*** since that really isn't part of our project.

Now we are ready to add Areas.

Area

The process to add, modify, or edit areas is identical to the process for sites.

To change the name of the area that is part of the initial project, click the ... ellipsis button to the right of the Area combo box. This opens the Area Ellipsis menu.

Figure 12 - Area Ellipsis Menu

The menu options are *Add Area*, *Edit Area*, and *Delete Area*.

Note: When Site is set to All Sites the Area Ellipsis menu options are disabled.

To change the name of the area displayed in the combo box, select *Edit Area.* The **Properties** dialog for the selected area displays.

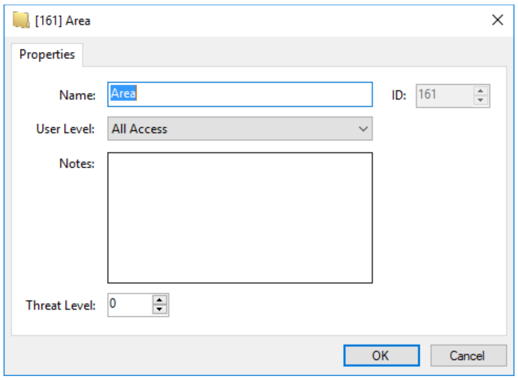


Figure 13 - Area "Area" Properties dialog

Enter the desired name in the **Name** field. Then click 

. The new name is saved, and the combo box is updated.

Figure 14 – Area "The Office"

If your project has multiple areas, add each area using the *Add Area* option. When an area is added, the properties dialog for that area is displayed so you can modify the name. The areas are added to the site selected in the **Site** combo box. If your project has multiple sites, please make sure you add the areas to the correct site.

The new area is added to the end of the list. To see the area list selected site, click on the arrow to the right of the drop-down list. The list will drop down.

Figure 15 - Example Area dropdown list

In the above figure, there are two entries in the list. ***All Areas*** is used to display all hardware in all areas for the selected site. ***The Office*** is the area for the example project.

Note: The first item in the list is All Areas. The Hardware Management View is used to manage and monitor all hardware in the Intelli–Site Lite system. Therefore, to quickly see all areas for a specific site, select All Areas from the list. All drivers and panels in the specified site will display.

Now we are ready to add Drivers and Panels.

Add Drivers

For Intelli–Site Lite to communicate to a field device, a software driver must be added to the project. Generally speaking, there must be at least one software driver for each field device in the project with which Intelli–Site Lite will communicate directly.

Some field devices can be chained together in some form or fashion, physically or logically. If your hardware system has field devices chained together, add those field devices to the same driver just as they appear in the chain. Consult the Panel Guide for more information if this is the case.

To add a driver, click the Add Driver button. If more than one driver type was selected during the Intelli–Site Lite installation, a dialog appears allowing you to select the specific driver type to add. Only the installed driver types are listed. Select the desired driver type and click OK. If there is only one driver type installed, Intelli–Site Lite assumes you want that type and skips this step.

A new driver icon is added to the **Hardware Management View** screen and the properties dialog for the new driver is displayed. The example project has one driver, a Compass driver.

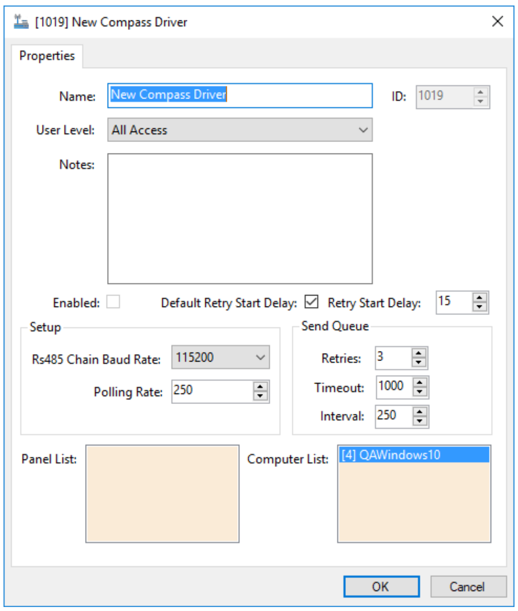


Figure 16 - Driver Properties dialog

For most installations, the default values for the driver will be correct. See the specific Panel Guide for information on the settings.

Notice the **Enabled** checkbox is not checked. For now, leave it so. When we are ready to bring the project online, we will enable the drivers. While we are designing, it is usually better to leave the drivers disabled.

Change the name of the driver to one that makes intuitive sense and click OK. The driver icon updates to reflect the name change.

Figure 17 - The Office Driver

Depending on the driver, a communication method may need to be configured. The alert icon indicates the panel must have a communication method. A Compass panel can communicate using TCP/IP or Rs232. Right-click on the driver to open its context menu. Mouse over *Comm Methods* to open the side menu.

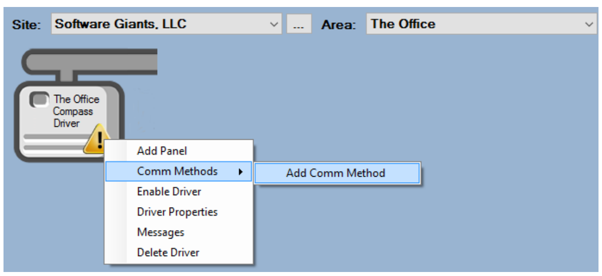


Figure 18 - Driver Context Menu Side Menu

Select *Add Comm Method*. The **Choose Communication Method Type** dialog appears.

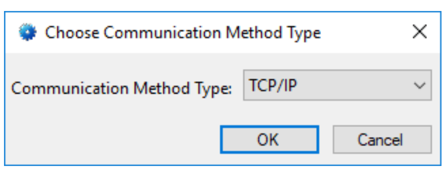


Figure 19 - Choose Communication Method Type dialog

In the **Communication Method Type** combo box, select the method this driver will use to communicate with the attached panels then click OK. The properties dialog for that method pops up. The example panel uses TCP/IP.

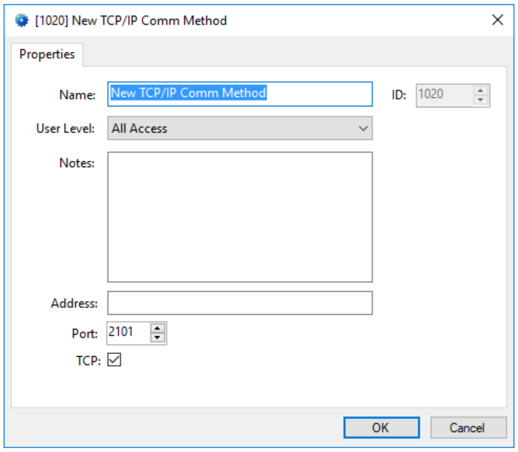


Figure 20 - TCP/IP Comm Method properties dialog

Supply the correct settings for this driver and field device pair. Most of the time an address or unique identifier is needed. Refer to the Panel Guide for detailed information on the different settings. Fill in the fields, including the name, and click OK.

Note: A driver is not specific to an area, panels are. A driver will appear in all areas until a panel has been added to it. From that point on, the driver is only visible in the area to which its panels belong.

The next step is to add a field device or, in Intelli–Site Lite jargon, a panel.

Add Panels

A panel is any field device or software object that can be communicated with by Intelli–Site Lite. All field devices and hardware are panels, but not all panels are field devices. These are advanced programming topics and will not be covered here. Here we will walk you through adding field device panels.

As stated in the last section, hardware is added to specific areas. Therefore, a site and area must be selected before any panels can be added.

A panel is attached to a specific driver because it's the driver that handles the communication to and from the physical panel. To add a panel to a driver, right-click on the driver to open its context menu.

Select *Add Panel*. An **Add Panel** dialog displays.

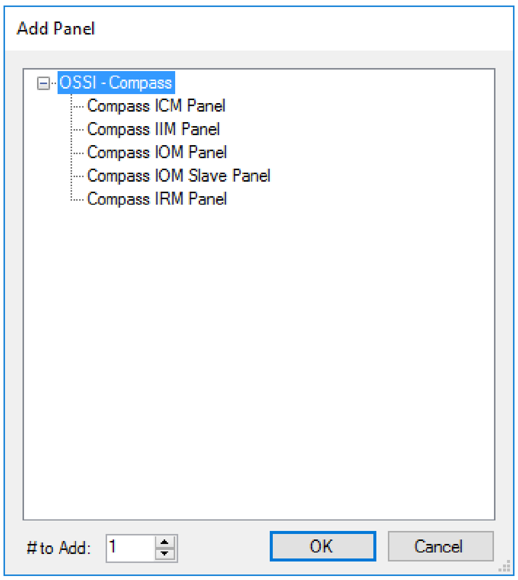


Figure 21 - Add Panel dialog

This dialog displays all the panel types that are valid for the target driver type.

Highlight the desired panel type. Then click OK. An icon is added to the **Hardware Management View** screen attached to the targeted driver.

Figure 22 - Driver with a new panel added

Note: When the Alert icon appears, it indicates a download of some kind is required by the panel. It may be present when the panel is added or when its properties are modified. This will be explained in Download to the Panel.

Of course, there are configuration requirements; at the very least the new panel needs an appropriate name!

Just like the driver, all panels have a context menu that is opened by right-clicking on the icon. ***Quick Config*** is the first option in this menu.

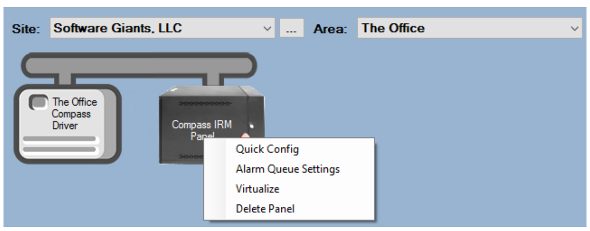


Figure 23 - Panel Context Menu

Select *Quick Config*. This opens the panel quick configuration dialog commonly called the **Quick Config** dialog. It combines all the configurable properties of the panel into one dialog. Consult the Panel Guide for detailed information about each of the properties, their purpose and their settings.

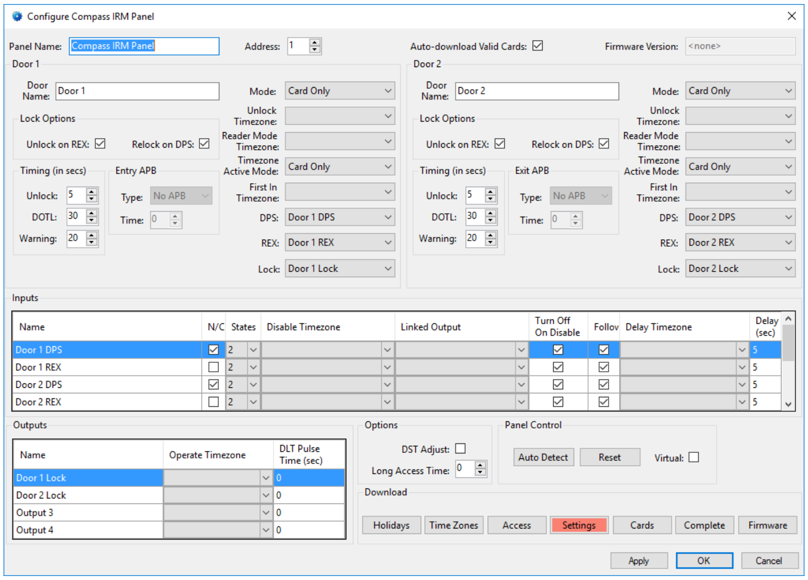


Figure 24 - Panel Quick Configuration dialog

At the very least, it is important to change the name of the panel and the doors and their associated inputs and outputs. The names should be descriptive enough to stand on their own as they will be used elsewhere in this process, specifically defining access sets.

Once the modifications have been made, save them by clicking OK.

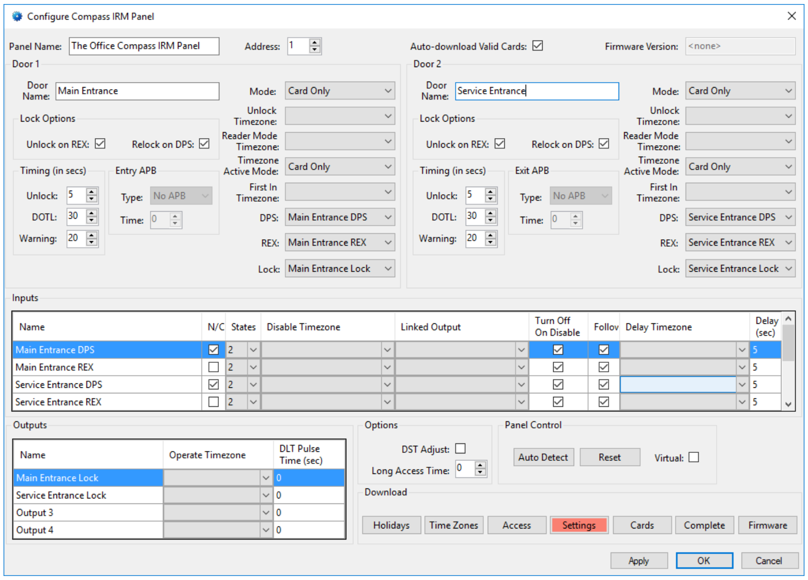


Figure 25 - Panel Configuration Completed

Note: The values in the combo boxes will update appropriately when the changes are saved.

When all panels have been added and configured, we can move on to Access Management.

Access Management

This section covers basic access management which is:

- Defining Access Sets
- Adding Personnel and Tokens
- Assigning Access Sets

Personnel, Tokens, and Access are all managed in **Access Management View**. To open **Access Management View**, click on Menu and select .

Note: "Personnel" is a generic term referring to persons who will be managed via Intelli–Site Lite. Cardholders are personnel.

"Token" is a generic term referring to any and all access credentials that can be assigned to a person.

Not every facility at which Intelli–Site Lite is installed is an access control facility.

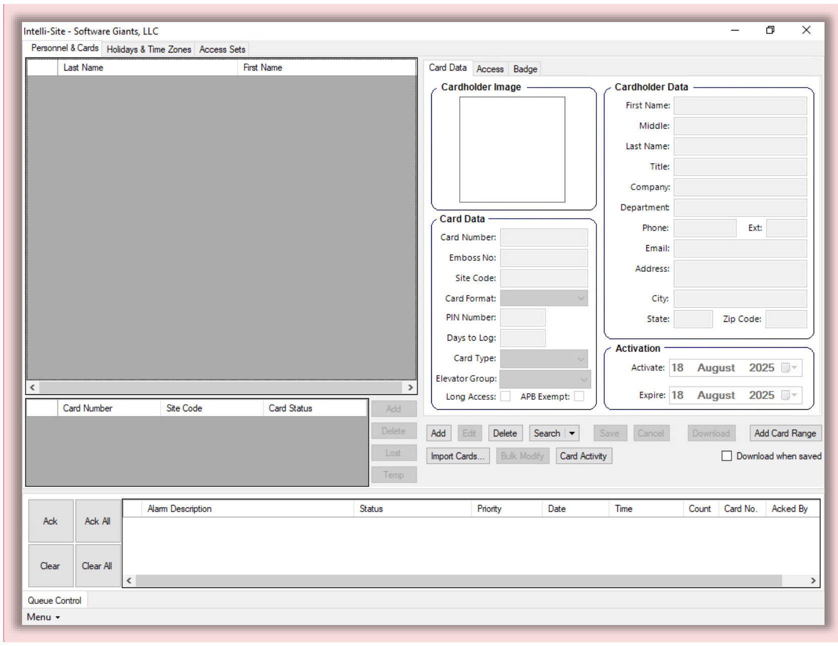


Figure 33 – Access Management View

Once the View is open, you are ready to begin.

Define Access Sets

There are several steps that must be fulfilled when defining an access set. The first was to add the access control panels which we did in section **Hardware Management**. Next will be:

- Define company Holidays
- Define Time Zones
- Define Access Entries
- Define Access Sets

Holidays and Time Zones are configured on the ***Holidays & Time Zones*** tab. Access Entries and Access Sets are configured on the ***Access Sets*** tab.

Commented [LT1]: Need new screenshots for all brands.

Define Company Holidays

How a facility is accessed on holidays is usually quite different than the normal day-to-day activity. Intelli–Site Lite is smart enough to understand that. Not all companies have the same holidays; therefore, the holidays for any facility must be entered.

Click on the ***Holidays & Time Zones*** tab to switch to it.

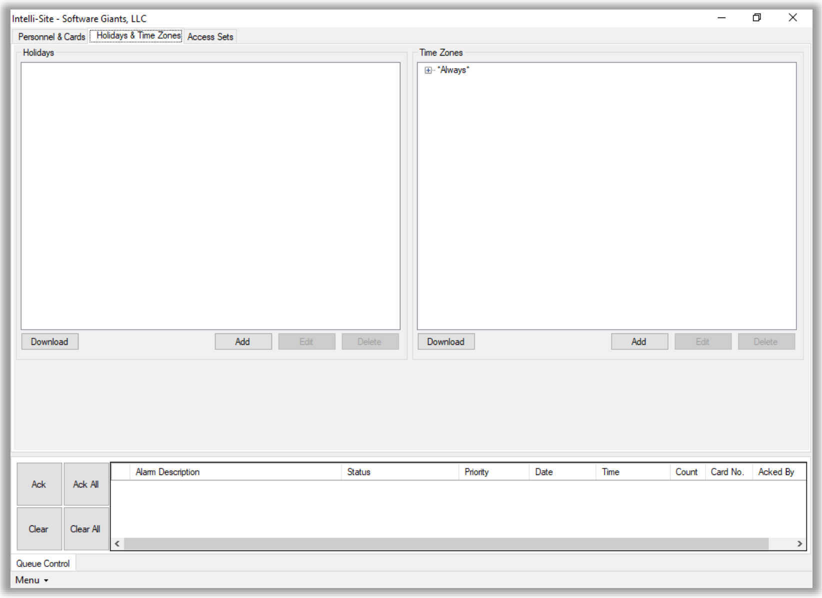


Figure 34 - Access Management View, Holidays & Time Zones tab

On the left is the **Holidays** list box. Underneath this list box are the buttons to manage holidays. By default, there are no holidays defined.

To add a holiday, click the Add button. A new holiday is added to the list and the properties dialog for this holiday is opened.

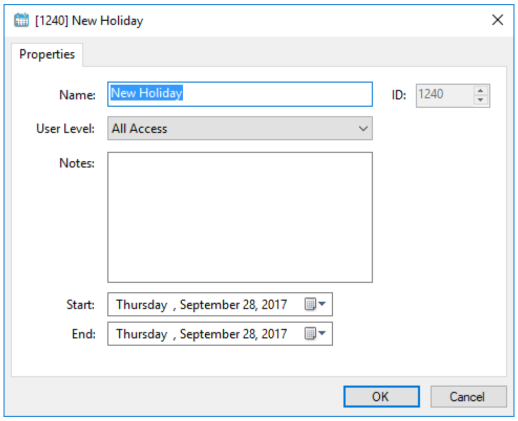
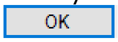


Figure 35 - New Holiday properties dialog

Name the holiday and set the start and end date. Save the data by clicking 

. Repeat for every holiday for your project.

Note: Holidays are specific calendar days. They must be updated every year.

Note: Compass panels do not include the year in the holiday definitions. See the Panel Guide for more information.

Once all the holidays are defined, the tab will resemble the following.

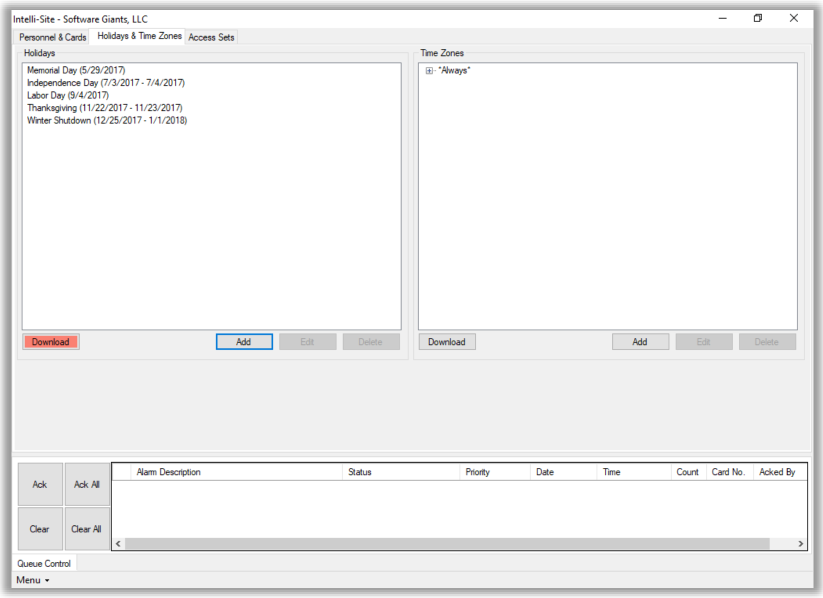


Figure 36 - Holidays & Time Zones tab with Holidays

Did you notice that Download changed? It became Download because holidays must be downloaded to the access control panels that are part of the project. It will stay Download until the holidays have been successfully downloaded to all panels that require it.

There are several steps along the way that will require download. We will finish all the access management steps and then perform one download at the end.

The next step is to define Time Zones.

Define Time Zones

A Time Zone is when personnel will access the facility such as the salaried work week, or first, second, and third shift.

The example project has:

- Access
    - Owner has 24/7 access
    - Janitorial Service only has access on Saturday mornings from 8:00am to noon, not including holidays
    - Standard access is Monday through Friday, 8:00am to 6:00pm, not including holidays
    - Overtime access is Monday through Friday from 6:00pm to midnight and Saturday 8:00am to midnight including all Holidays

Therefore, we need Time Zones for 24/7, Saturday mornings, standard, and overtime.

Time zones are defined on the ***Holidays & Time Zones*** tab. The **Time Zones** list box can be found to the right of the **Holidays** list box.

Note: Intelli–Site Lite ships with the special time zone *Always*. This time zone must exist. Do not edit or delete it.

To add a time zone, click the Add button underneath the **Time Zones** list box. A new time zone is added to the list and the properties dialog for the new time zone is opened.

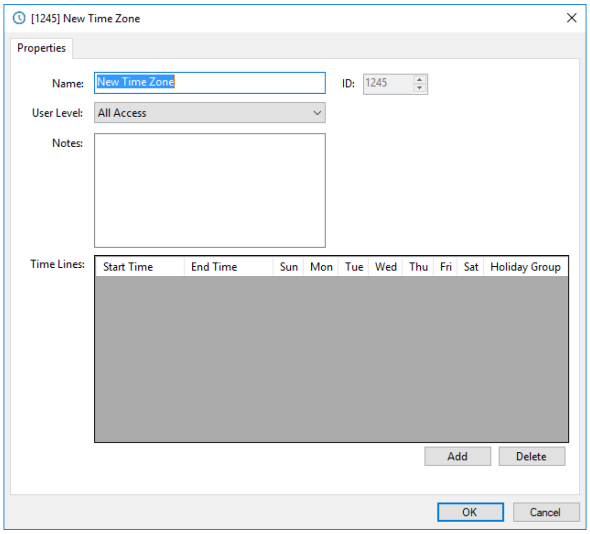


Figure 37 - New Time Zone Properties dialog

Change the name to describe the time zone being created. In this case, the name is "24/7". Then add a **Time Line** by clicking the Add button. Set the **Start Time**, **End Time**, days of the week, and **Holiday Group** for this time zone.

Click OK to save the modifications and dismiss the dialog.

Did you notice that Download changed? It became Download because, like holidays, time zones must be downloaded to the access control panels too. It will stay Download until the time zones have been successfully downloaded to all panels.

Expand the time zone in the list to see the details.

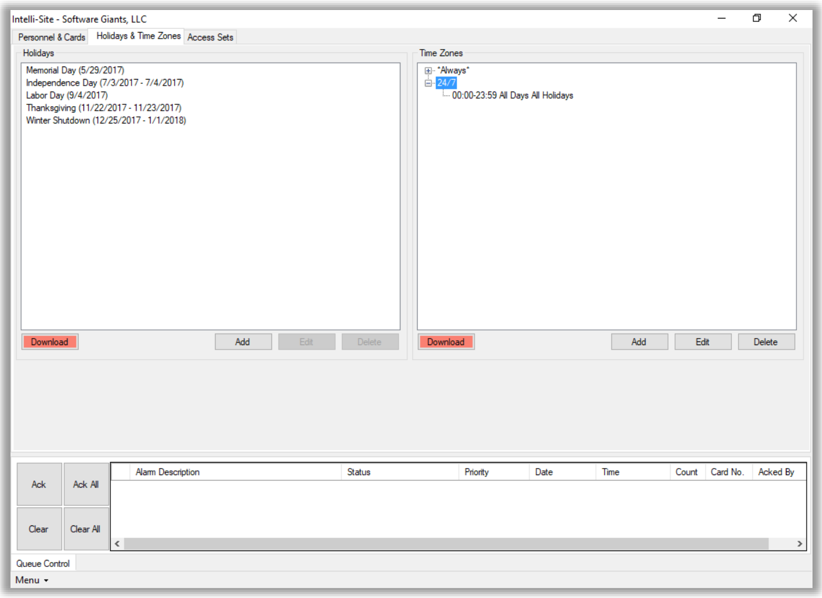


Figure 40 – Holidays & Time Zones tab with a programmed time zone

There can be more than one time line in a time zone. In fact the Overtime time zone in the example project has two. When editing the time zone, use the Add button to add any additional time lines needed.

Add all the time zones required by your project. Below is a screenshot of all the time zones in the example project.

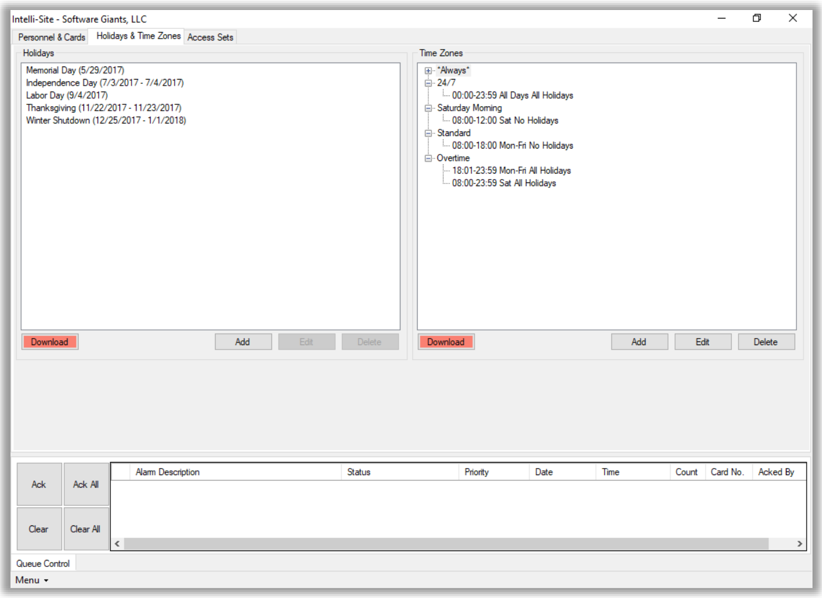


Figure 41 - All the Holidays and Time Zones for the Sample Project

The next step is to define access entries.

Define Access Entries

Access Entries are access definitions for an access control panel, the doors and locations controlled by that panel, during a particular time zone. Make the access entries as specific as possible. Make sure to define an access entry for each time zone that is applicable to the panel. Access entries are grouped in access sets. The access sets are granted to personnel. The more granular you make the access entries, the more flexibility you will have when defining access sets.

Access Entries are created on the ***Access Sets*** tab of the **Access Management View**. To open the **Access Management View**, open the application bar menu by clicking Menu ▾. Select. In the **Access Management View**, click the ***Access Sets*** tab.

In the **Access Entries** list box, there is a list of every access control Panel in the project. The example project only has one, The Office Compass IRM Panel.

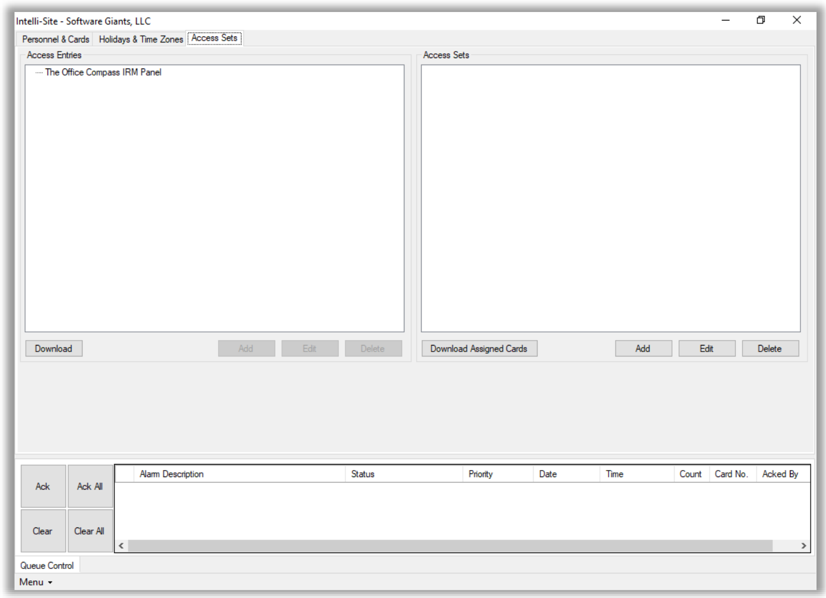


Figure 42 - Access Sets tab

Highlight an access panel and click the Add button below the Access Entries list box. An access entries definition dialog displays.

Note: MAC access entries are called "Access Groups" in MAC vernacular.

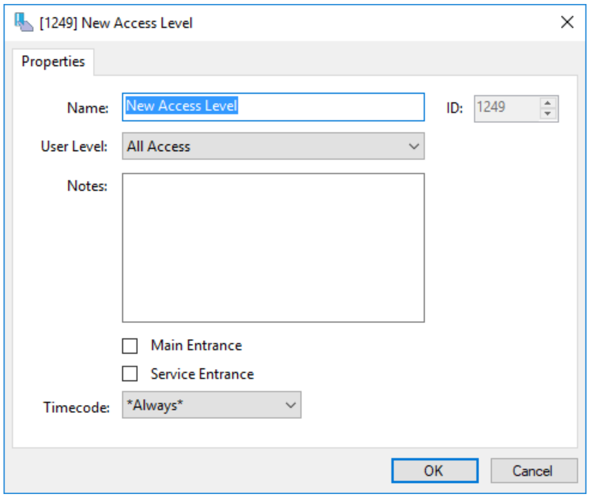


Figure 43 - New Access Entry dialog for a Compass IRM Panel

Note: Compass access entries are called "Access Levels". Time Zones are "Timecodes".

Name the new access entry; select the doors/readers and the corresponding time zone; click OK to save the changes.

Do this for each access entry in your project. Below are the access entries for the example project.

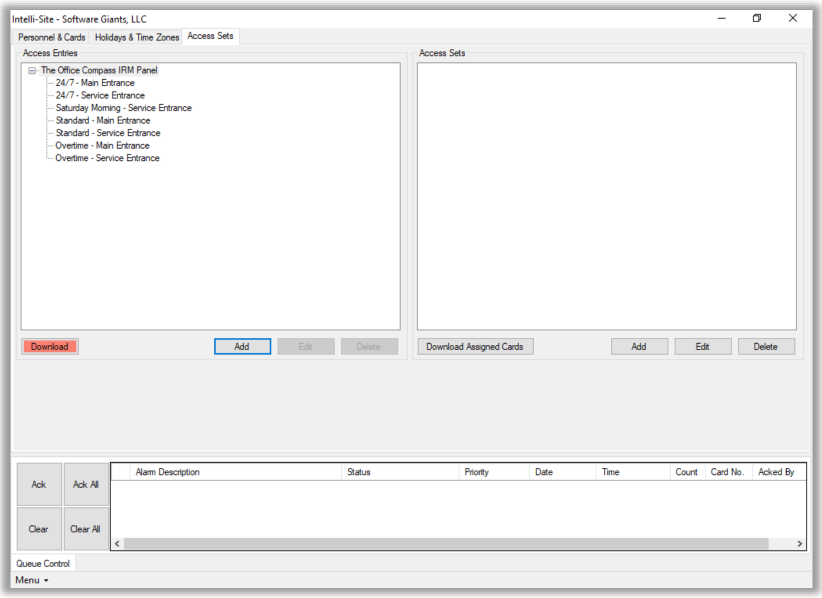


Figure 44 - Access Entries for the Example Project

Again, notice Download has changed to Download. Access entries must be downloaded to the access panels to take effect. It is almost time to download the settings, but not quite yet.

Now it is time to group the access entries into access sets.

Define Access Sets

Access Sets are groups of access entries. It is access sets that are assigned to personnel. Before creating any access sets, consider how your facility will be accessed. Some groups of personnel will have access via more than one door but at different times.

To create an access set, click the Add button under the Access Sets list box. An **Access Set Data** dialog displays.

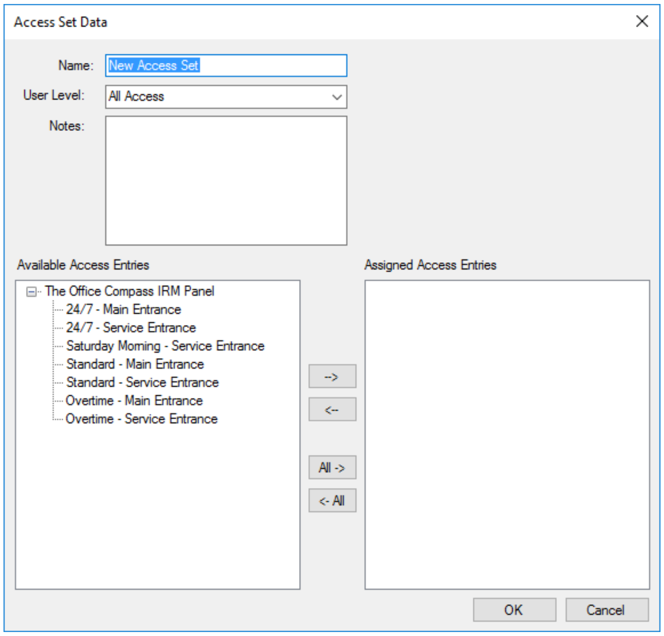


Figure 45 - Access Set Data dialog

Name the access set. Then move the access entries for this set from the **Available Access Entries** list to the **Assigned Access Entries** list by highlighting the desired entries and clicking the arrow button. You can also double-click on an entry to move it. Click OK when the set is complete.

The access set appears in the **Access Sets** list box. Expand the set to see the details.

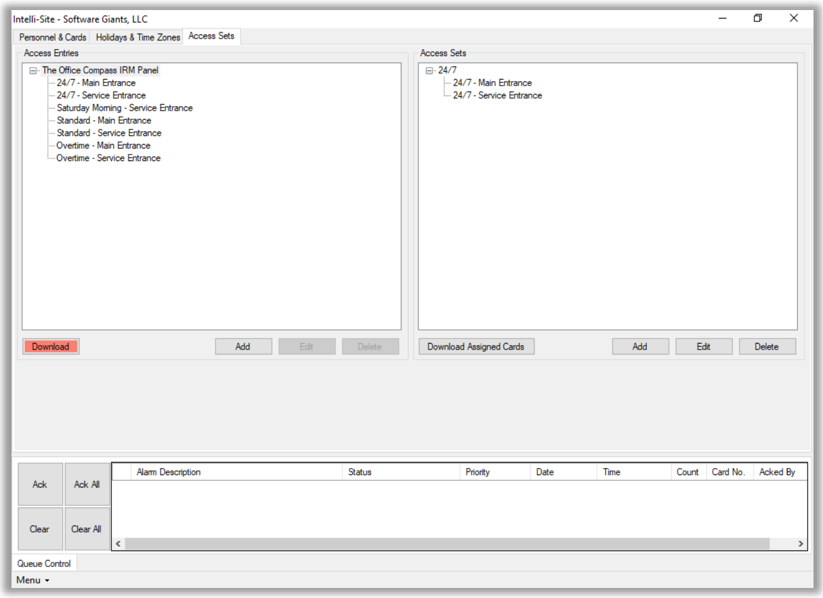


Figure 46 - Expanded Access Set Showing the Included Access Entries

Add all the access sets for your facility.

Add Personnel and Assign Access Sets

Personnel and cards are managed on the ***Personnel & Cards*** tab of **Access Management View**. This is also where access sets are assigned to cards.

To open the **Access Management View**, click Menu in the lower left-hand corner of the Intelli-Site Lite Client window. The Application Menu opens; select . The **Access Management View** displays. If necessary, click the ***Personnel & Cards*** tab.

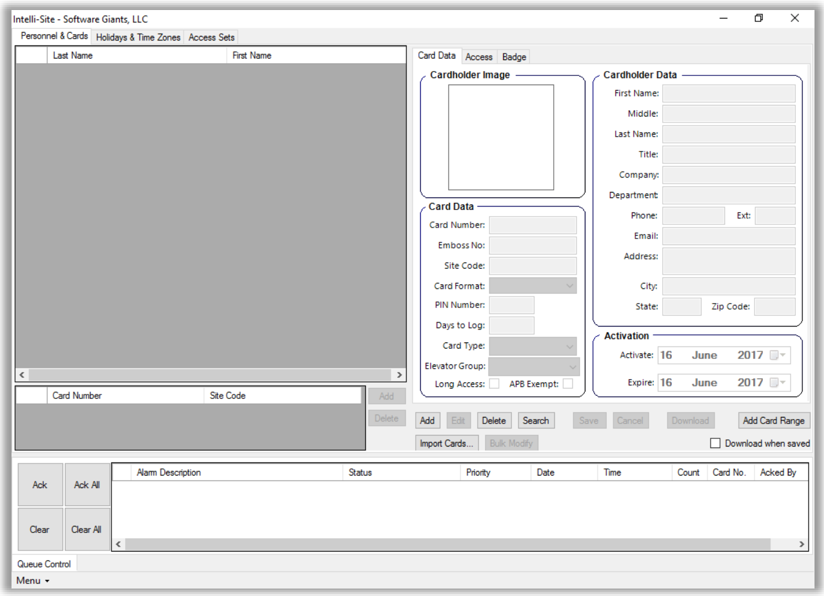


Figure 47 - Access Management View - Personnel & Cards tab

Information related to the cardholder and their card is entered on the ***Card Data*** tab. Access sets are assigned to a card on the ***Access*** tab.

To add a cardholder and their card, click the Add button under the ***Card Data*** tab. All the fields for **Cardholder Data**, **Card Data**, and **Activation** become active.

Fill in the cardholder information, the card data information, and set the activation and expiration dates.

Note: The required fields for a cardholder are First Name and Last Name. The required fields for a card are Card Number, Site Code, and Card Format.

It is acceptable to add a cardholder without adding a card. If this is the case, ensure the Card Number field is empty or zero. A dialog will popup confirming you want to add a cardholder without assigning a card to them.

Note: The Card Number, Site Code, and Card Format must be provided for each card. The combination of these three fields uniquely identifies the card. Therefore, one (Card Number, Site Code, Card Format) combination can be assigned to only one card holder. A card cannot be shared.

Switch to the ***Access*** tab and assign the correct access to the card. You can double click on an access set to move it to the other Set list or highlight the access set and use the appropriate arrow button.

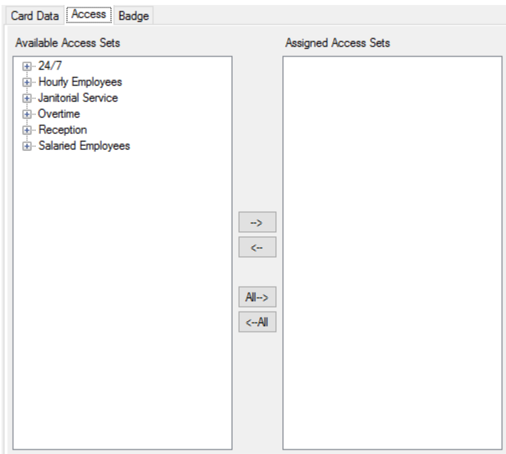


Figure 48 - Personnel & Cards: Access tab

When the cardholder data, card data, and access sets have been set, click  . The information is saved, the person's last name and first name are displayed in the personnel table and the card number and site code are displayed in the card table. And the Download button changes too! This way you know which cards have not been downloaded.

Repeat for all personnel. Once all the personnel and cards have been added and access sets assigned, it's time to download the data to the panels.

Download the Project Programming

Now that the project has been programmed, it is time to send the programming down to the panels. The process of downloading is:

- Enable the drivers
- Download to each panel

Return to **Hardware Management View** by clicking on Menu and selecting .

Enable the Drivers

Because the drivers were not enabled when they were added to the project, they must be enabled one at a time. Once they are enabled, they will stay enabled until specifically disabled. If for some reason the Engine is stopped or the host computer reboots, the driver will be enabled when the Engine restarts.

Enabling a driver is simple. There are two ways to enable a driver. You can enable the drivers manually, one at a time. Or you can use Quick Status to enable multiple drivers at a time.

Enable Multiple Drivers Using the Quick Status Button

The Quick Status button gives you a tree view of the drivers and panels in the project. It shows you the current status of each driver whether it is enabled or disabled and the current status of each panel whether it is virtualized or not. You can also change the status of the drivers and panels by the checkboxes next to each driver or panel.

Click Quick Status. The **Quick Change Driver/Panel Status** dialog displays. Each of the drivers with their panels are displayed in a tree in the **Driver/Panel Status** list box. If the driver is offline, the checkbox is clear. If the panel is not virtual, the checkbox is checked.

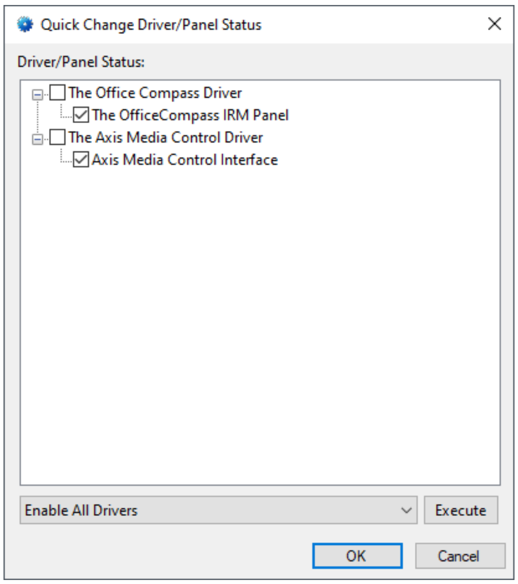


Figure 49 - Quick Change Driver/Panel Status

In the Driver/Panel Status tree list, locate the driver or drivers you want to enable. Click the checkbox next to the driver's name to check it.

Below the **Driver/Panel Status** list box is a drop-down menu of global actions to modify the Driver/Panel Status tree list. Select the desired action, in our case "Enable All Drivers". Then click Execute to perform the action on the tree list in the list box.

To keep the changes made to the tree list, click OK. The Engine will enable all the drivers and panels that are checked and disable/virtualize the drivers and panels that are not checked if applicable.

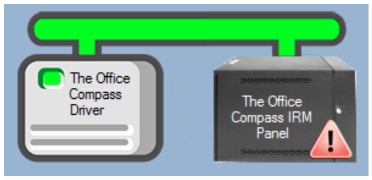


Figure 50 - Driver Enabled and Panel Online

Note: Not every driver can be enabled this way. Many video drivers must be enabled individually. This option is meant to simplify the management of access control panels at large facilities.

Manually Enable a Driver

Use the *Enable Driver* option in the driver context menu. Right-click on the driver to open the context menu and select *Enable Driver*.

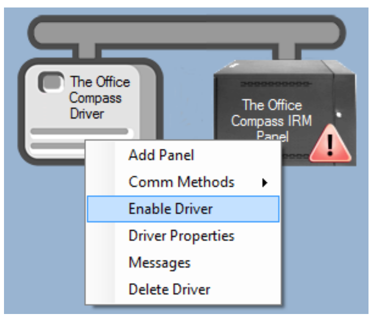


Figure 51 - Driver Context Menu: Enable Driver

When the driver is enabled and the panel is online, the link between them changes to green. If it does not, please refer to the proper Panel Guide for troubleshooting instructions.

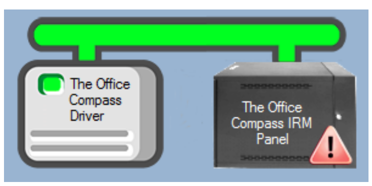


Figure 52 - Driver Enabled and Panel Online

Repeat this for each driver.

Download to the Panel

There is more than one way to download the programming to the field devices. This guide will use the download button found on the **Quick Config** dialog for each panel. This ensures that everything is downloaded without having to do it one thing at a time.

Right-click on the target panel to open the context menu. *Quick Config* is the first option in the menu; select it. The **Quick Config** dialog opens.

Locate the **Download** group box. Each panel type has its own **Quick Config** dialog. The **Download** group box may be located in a slightly different location. The figure below shows the location of the group box for a Compass IRM Panel.

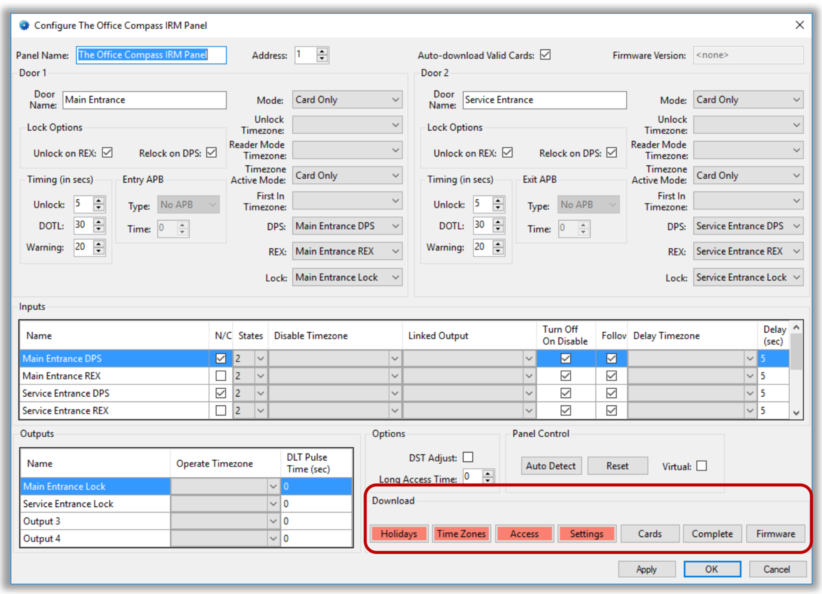
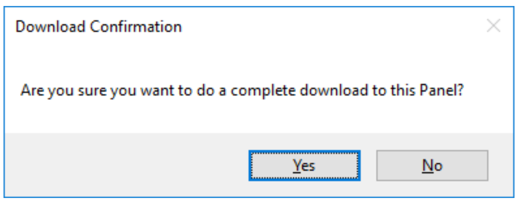


Figure 53 - The Download Button(s)

Note: Because the panel in the example project is a Compass panel, it is necessary to auto-detect to establish communication before downloading. Consult the Panel Guide for your access control panels to determine if there are any other initialization steps.

Notice that there are several different download buttons. Each will download different data. The Complete button will download all the required data. Click the Complete button. A **Download Confirmation** dialog displays to ensure you want to do a complete download.



Click Yes. Each of the individual download types in the **Download** group will be sent to the panel. The download buttons will return to the neutral color.

Repeat this section for each panel.

Congratulations! You have just programmed your Intelli–Site Lite project.

Reports View

The Intelli–Site Lite provides several reports on card activity and system information in **Reports View**. To go to **Reports View**, click on Menu and select .

This is the **Reports View** window.

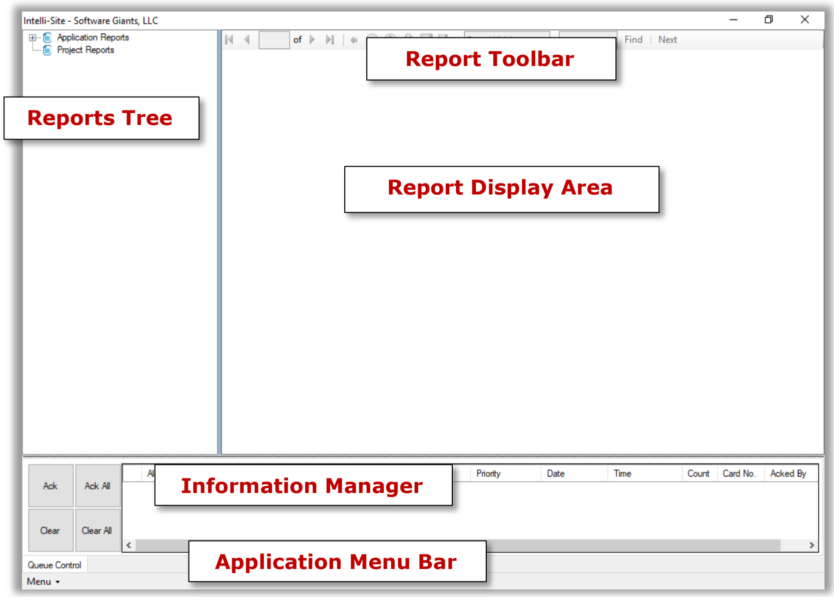


Figure 54 - The Reports View

Reports Tree – Used to navigate to the desired report; divided into two folders:

- **Application Reports** – The reports supplied by Intelli–Site Lite, divided into two folders
  - **Cards –** Card management (May also include Accutech and/or RFID if those systems were included in the installation and license)
  - **System** – Providing information on event history, statistics, and detailed system information

- **Project Reports** – The reports specific to the project created by the integrator or the user using Microsoft's **SQL Server Reporting Services** (SSRS)

Report Display Area – Displays the generated report

Report Toolbar – Contains the tools to manipulate the generated report

Information Manager – Displays operational information for alarm display and management; not technically part of any View but visible in any View

Application Menu Bar – Contains the Application Menu and the status of the license and SMA

Reports Tree

The Reports Tree contains two root nodes: Application Reports and Project Reports. The Application Reports are the default reports that are installed with Intelli–Site Lite. The Project Reports are those reports the integrator or user creates. Custom reports can be created using Microsoft's **SQL Server Reporting Services** (SSRS), a third-party reporting product.

The **Cards** node and the **System** node are revealed when the **System Reports** node is expanded. Cards reports are useful for Card Management (e.g., which cards have been assigned an access set). System reports are useful for providing information on event history, statistics, and detailed system information.

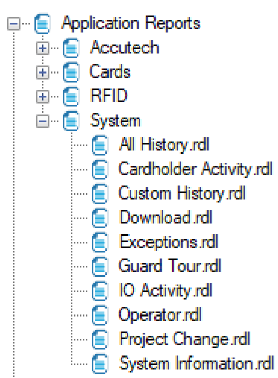


Figure 55 - System Reports

Two reports that are most often used are **Card Holder Activity** and **Custom History**. Let's dig into these two reports. For information about any other report, please see the Intelli–Site User's Guide.

Cardholder Activity Report

The Cardholder Activity Report, **Cardholder Activity.rdl**, lists the readers at which a card has been presented. When this report is double-clicked, the **Report Parameters** dialog appears.

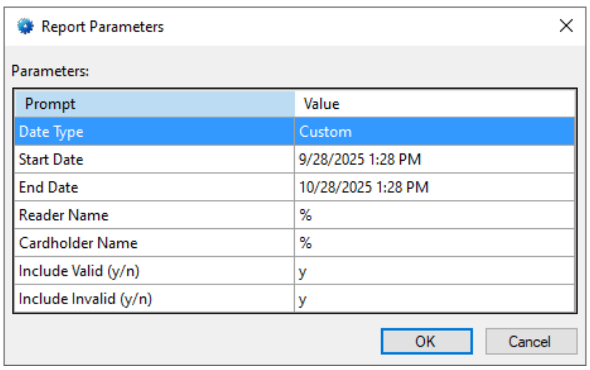


Figure 56 - Report Parameters Dialog

The parameters of the report are the search criteria allowed for the report. They are listed in the **Prompt** column. For this report they are *Date Type*, *Start Date*, *Stop Date*, *Reader Name*, *Cardholder Name*, *Include Valid* (reads), and *Include Invalid* (reads).

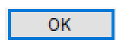
The **Value** column is where the user enters the corresponding data for the search criteria. There are special keywords values for the *Date Type* prompt. If the user supplies one of following keywords, the *Start Date* and *End Date* prompts are ignored.

- **Custom** – Use the supplied *Start Date* and *Stop Date*
- **Today –** All records since midnight this morning
- **Daily –** The previous full day
- **Weekly –** Sunday through Saturday of the last full week
- **Monthly –** The previous month

The values for *Include Valid* and *Include Invalid* are either y or n.

In the remaining fields, the default value is '%'. By entering '%', everything will be reported. For any other value in the field, the report generator will match values that contain the specified string. For example, if the card number is the parameter, and the user enters '121', then the report will include all cards whose numbers contain 121'.

Note: For the reports, the search criteria use "contains" and not "begins with". This means that if '1' is specified as the search criterion for a Card Number, every card that has a '1' in it will be included in the report. 1000032, 54123, and 432451 would all be included in the report because each card number contains the number 1.

Once the values for the prompts are filled in, click the 

button. The report will appear in the **Report Display Area** whether data was found that matched the criteria or not.

The report columns for this report are **Date/Time**, **Reader**, **Cardholder**, **Card Number**, **Site Code**, and **Status**. **Cardholder** is "last name, first name". The report is sorted by **Date/Time**.

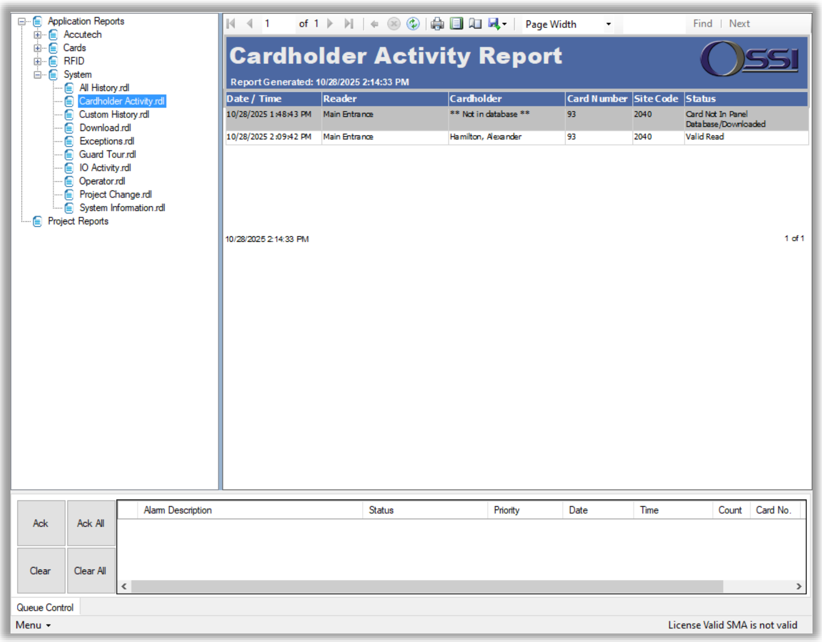


Figure 57 – Example Cardholder Activity Report

All History Report

The All History Report, **All History.rdl**, lists every event that has been logged in the database. When this report is double-clicked, the **Report Parameters** dialog appears. The parameters are the *Date Type*, *Start Date*, and *Stop Date*.

There are two (2) rows in the report header describing the information supplied. If an entry does not have any information for row two, that row is not written. The columns of the first row are Date/Time, Point, Operator, Status/Event, and Computer. The second row, if applicable, is Cardholder, Card Number, and Comments. The report is sorted by Date/Time.

Custom History Report

The Custom History Report, **Custom History.rdl**, is used to create a history report that is focused. The All History report generates a report with everything that happened in the specified time period. At active sites, this is too much data to filter through. The Custom History report lets you combine information in one report that might normally exist in multiple reports or pinpoint the data reported. When this report is double-clicked, the **Custom History Report** dialog appears.

After selecting the report settings, click OK to run the report. Use Save Settings to save the settings as a **Report Settings** node. You will be able to use these settings again in **Reports View** or in project programming.

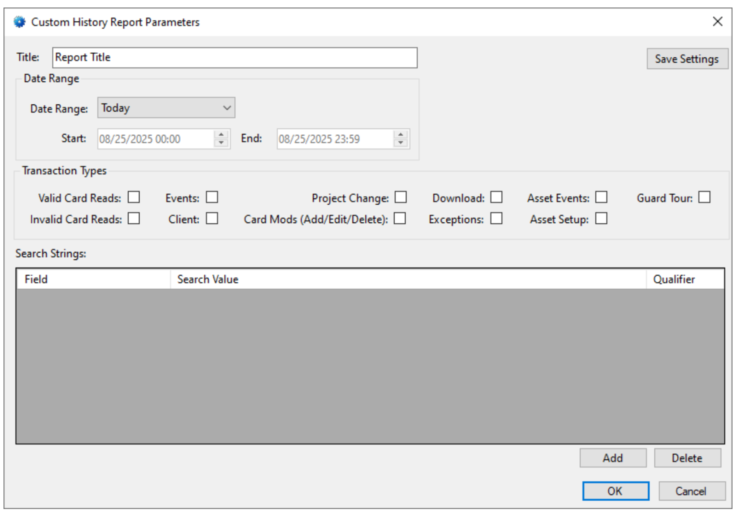


Figure 583 – Custom History Report Dialog

Title – Allows the user to specify a title for this report instead of the default title presented by the other reports.

Date Range – Filters events to only those whose time matches the selected Start and End times. The Start and End times are automatically generated for all Date Ranges except for Custom.

Transaction Types – Allows the user to specify what types of events will be selected for the report.

Search Strings – table; Allows the user to specify search strings on a field-by-field basis from the Activity and Project Change tables. An event must match all the search criteria to be included in the report. But if the same database field is entered multiple times, the event needs to only match one of those criteria for that field to be included.

Add **-** button; add a row to the Search Strings table

Delete - button; delete the highlighted row from the Search Strings table

Field – drop-down box; the database fields in the Activity and Project Change tables that can be used to filter the data

Search Value – text box; the text to compare with the **Field** data

Qualifier – drop-down list (values: = (default), <, > *Starts With, Ends With,* and *Contains*)

Note: Every time a Custom History report is run the report parameters are stored in the Custom History node in the Project Node Tree. They are global. These are the starting parameters used the next time the Custom History report is double-clicked. It is remembered from login to login.

If the report settings created for this report are ones you will use again, click Save Settings. An **Are you sure?** dialog displays. If you click Yes, the report settings are saved as a child of the **Custom History** node in the reports tree. The name of this node is the text in the **Title** field of the report parameters.

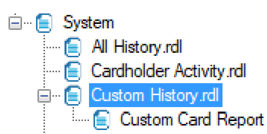


Figure 59 - Custom History Report Settings node

It is possible a user could be confused by Save Settings and OK; Save Settings does not run the report. It saves the report settings to be used at another time or in project programming. Whether you save the settings or not, you are returned to the **Custom History Report Settings** dialog. Click OK to run the report or Cancel to not run the report.

The report columns are **Date/Time**, **Point**, **Operator**, **Status/Event** and **Computer**. The report is sorted by **Date/Time**.

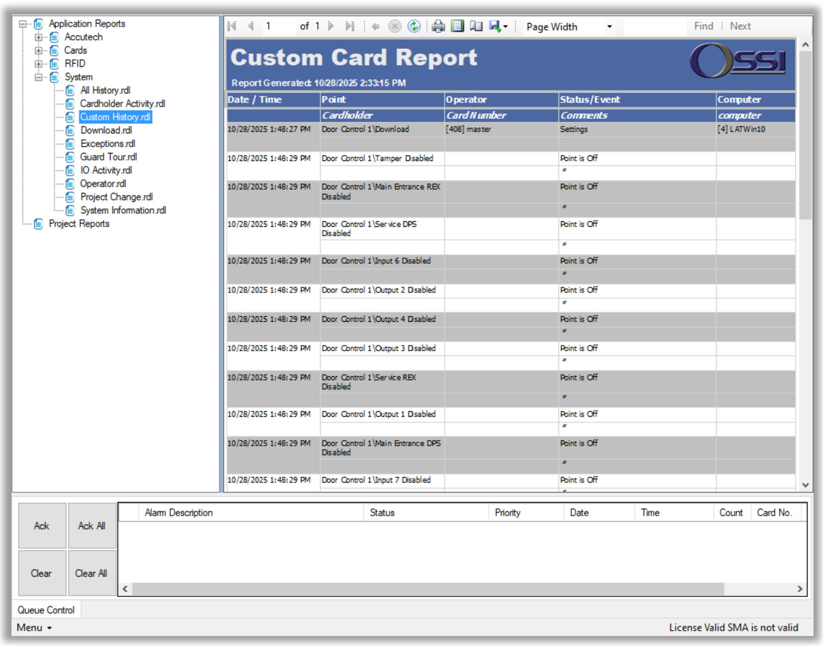


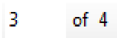
Figure 60 - Example Custom History Report

Report Toolbar

Any report generated will appear in the **Report Display Area**. At the top of the area is the Report toolbar.

 Displays the first page of the report

Displays the previous page of the report



Indicates which page of the report is showing (e.g., page 2 is showing; the report has 2 pages)


Displays the next page of the report


Displays the last page of the report


Back to Parent Report is **not available** because generating sub-reports requires the full SQL Server Reporting Services


Stop rendering; only active when the report is being generated

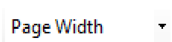

Refresh the report using the same parameters


Opens the standard Windows Print dialog to print the report

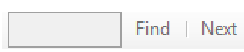

Print Layout toggles between showing the report in print layout or not


Opens the standard Page Setup dialog


Open the Export Options menu to export the report; the options are Excel, PDF, or Word



Allows selection of the screen magnification options to size the report display



Enter the text to search for in the report; not available in Print Layout view

Table of Figures

Revision History

2025-10-28 Created