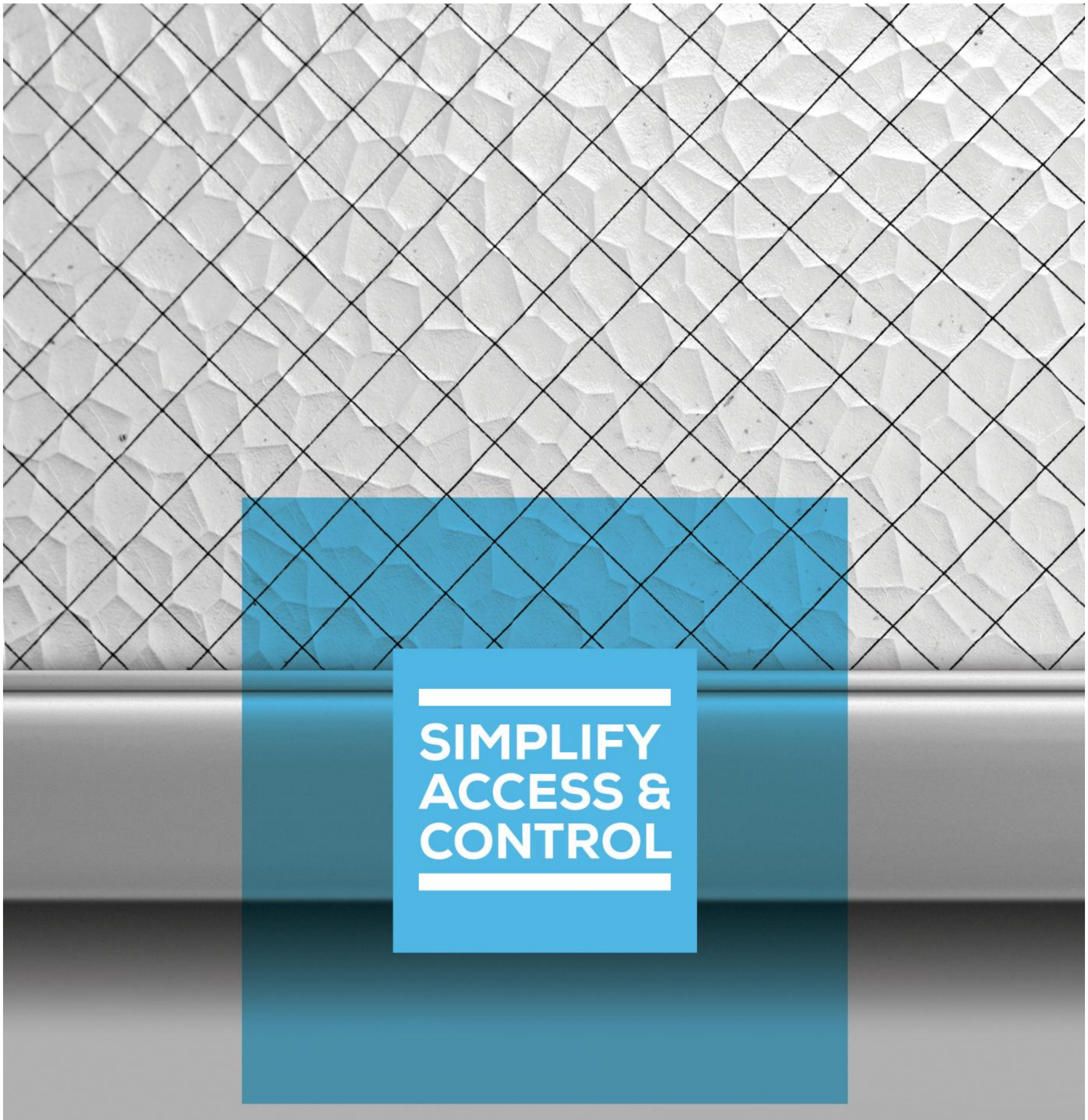

Intelli–Site Lite 4.2

Security Management Software

User's Guide

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Security Management Software

User’s Guide

For Windows 11 Pro and Enterprise,
Server 2019, and
Server 2022

Copyright

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8.10 This Agreement shall be governed by and construed in accordance with the laws of Wisconsin. The application of the United Nations Convention on Contracts for the International Sale of Goods is hereby expressly excluded. It is the express wish of the parties that this Agreement and all related documents be drawn up in English.

C'est la volonté expresse des parties que la présente convention ainsi que les documents qui s'y rattachent soient rédigés en anglais.

Technical Support Assistance

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Technical Support

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

The Intelli–Site software is a scalable, PC-based system designed to integrate, control, and manage electronic security components and subsystems. Intelli–Site integrates electronic security products and subsystems from multiple manufacturers into a single functionally enhanced, centrally controlled security system.

Intelli–Site allows for integration of the following types of subsystems:

- Access control systems and field panels
- Closed circuit television matrix switchers
- Digital video multiplexers
- IP DVRs with action controls
- Fire alarm systems and panels
- Proximity Sensors
- Intercom systems (microprocessor based)
- Radio paging systems
- Burglar alarm digital receivers
- Programmable logic controllers (PLCs)

Intelli–Site incorporates a user-defined point and click windows graphical user interface (GUI) that can be configured to meet the unique needs and skill level of each user. In addition, Intelli–Site has a web browser interface that can be enabled or disabled.

Intelli–Site utilizes a Tree window display that supports full graphical drag-and-drop configuration and setup. The system administrator, via password-controlled user profiles, assigns system features.

The Intelli–Site GUI allows the user to add site, building and floor plan map graphics or control diagram graphics to support alarm annunciation, device control and device monitoring that is uniquely suited to the user's requirements. Intelli–Site supports Screen Objects (smart Icons) that graphically show the status of each device utilizing an infinite number of states. These user-defined Screen Objects allow the operator to control and monitor devices using a mouse or optional touch screen.

Many common functions of the Intelli–Site GUI have been combined into Views that greatly simplify programming, maintenance, and daily use.

Key Features

Integration support for existing and future equipment – Intelli–Site is a true "open architecture" software package that can incorporate previously installed and future electronic security equipment from different manufacturers into a single, fully integrated, multi-user security management system.

Two Client Interfaces – The Intelli–Site system has two client interfaces: the traditional desktop client and a web interface. The Intelli–Site Web Service allows the User to access the Intelli–Site system via standard web browsers on computers and handheld devices.

Multiple Client Platforms – The Intelli–Site Web Service allows the User to access the Intelli–Site system via standard web browsers on computers and handheld devices such as tablets and smart phones.

Views – Formerly known as Modes, the Views combine common functionality into simple, graphical, intuitive interfaces. There are Views for Access Management, Hardware Management, Reports, Documentation, Scheduled Events, Activity, Video as well as the **Design View** and **Live View** from previous versions of Intelli–Site. There is also a view to manage and monitor Accutech systems.

User-defined functionality – Intelli–Site allows the user to pre-define the actions to be executed upon the occurrence of each system event. Previously defined actions can be changed at any time - as often as necessary - using "point and click" menus and selections. Multiple events are processed simultaneously in a multi-tasking, multi-threaded environment.

User-defined alarm and event processing – Intelli–Site allows the user to customize messages, priorities, colors, audio sounds (.wav files), video events, functionality, and Screen Objects associated with alarm and event conditions.

User-defined graphical user interface (GUI) – Intelli–Site provides a user-defined GUI that can be designed and configured to meet the unique needs and skill level of each user. The GUI is comprised of standard windows tool bars, Node Trees, Dialog Boxes, and graphic images. User defined graphic images are designed and produced utilizing industry-standard graphics software packages that support a broad-range of image formats.

Text-to-Speech (TTS) – Intelli–Site's TTS software feature allows activation of a computer-synthesized voice that speaks to the user. It can announce cardholder names, system events and actions, as well as provide command verification and special instructions. The user hears the name and the action taken by cardholders, as well as confirmation of the user's actions, and system instructions. In order to utilize the TTS software module, a Windows Server Class- or Windows XP Professional-compatible sound card and speakers are required

User controlled access – Intelli–Site uses its own user database to restrict and manage access to modules and functions (internal passwords) or can make use of Windows Users and User Groups security services. All access to the Intelli–Site system is controlled by password as defined by the system administrator.

Operating System – Intelli–Site runs under the Microsoft Windows Server Class and several versions of Windows. See Minimum System Requirements for a complete list. Following good security practice, we recommend you keep current with ongoing Microsoft released OS security updates. Such updates should not interfere with Intelli–Site operations.

Database – Intelli–Site utilizes PostgreSQL.

Reports – Intelli–Site includes a built-in report generator to provide quick, pre-defined reports that include data specific to system operations.

Multi-Lingual User Interface – **Not Yet Implemented** Intelli–Site employs a built-in language string translation table to provide the end user with the ability to translate the operator interface pages into a virtually unlimited number of languages. The language presented to an operator will be automatically selected based upon the operator's Windows logon credentials and localization settings.

Network – Intelli–Site uses TCP/IP to provide an integrated, networked system. Intelli–Site integrates into existing networks, reducing overall installation and maintenance costs. The Intelli–Site Lite Administrator can add new Workstations to enhance overall system control and monitoring.

Optional Features

Access Management (AM) – The AM feature allows the system to support card access control operations. The Card Management System module allows the user to add, modify, and delete cardholder data, time zones, access levels and access groups utilizing a user-defined point-and-click GUI. Intelli–Site allows the system administrator to add and delete database fields and graphically design individual on-screen data entry forms to meet the unique needs of each facility.

Video Badging (VB) – The VB feature allows the user to capture and store a digital picture image, graphically create and produce multiple badge designs to meet user-specific requirements as well as print photo ID badges for use with card access operations.

Live Video (LV) – The LV feature allows a user to program a live video picture from a camera to automatically display upon detection of a user-defined event within the Intelli–Site system, such as an alarm condition or card access event.

Video Recording (VR) – **Not Yet Implemented** The VR feature allows Intelli–Site to record video from a camera on demand or in response to an alarm. Both post-alarm & pre-alarm video recording are available.

Engine Redundancy (ER) – The ER feature allows multiple Intelli–Site Engines to be configured as a hot-standby Engines to an existing Intelli–Site Engine to minimize downtime due to any computer/network failure (e.g. hard drive failure on the primary computer). The secondary Engines will wait offline ready to replace the primary Engine in the case of a failover event, whether planned (e.g. Engine maintenance) or not. These redundant Engines must of course reside on a separate host computer.

SQL Server Database (SQL) –The SQL feature allows an MS-SQL Server to be used for Intelli–Site's database.

Oracle Database (ORL) – Not Yet Implemented The ORL feature allows an Oracle database to be used for Intelli–Site's card holder database.

Door Construct (DC) – The DC feature allows a central configuration point for doors. From here, you can drag and drop panel I/O Points into a door to simplify programming. Included in this feature is the ability to build Interlock Groups. Doors are configured to be members of an interlock group so that access attempts to doors within the interlock group will be denied should any door belonging to the interlock group be open.

Alarm Zone (AZ) - The AZ feature allows a central configuration point for alarm zones. From here, you can drag and drop panel I/O Points into an alarm zone to simplify programming. Included in this feature is the ability to build multiple-sensor alarm zones that have the capability of combining different types of sensor signals and determining alarm response to direction, multiplicity of sensor alarms, types, etc. The Alarm Zone Construct also allows for assignment of video assessment systems (cameras) on a zone-by-zone basis.

Anti-Passback (AP) – The AP feature provides a means to strengthen access control. By defining Anti-Passback zones & doors, access to other zones is restricted by both access permissions and cardholder presence. Depending on the Anti-Passback zone setting (hard or soft), you can deny access or just log violations. Mustering is included with this feature. This feature requires the Door Construct.

Multi-Queue (MQ) – The MQ feature provides a means to send alarms to a user created Queue. As such, the master alarm queue of the Information Manager can be hidden, but certain alarms and I/O Point states can still be seen and managed. These queues can be configured to pop up automatically whenever there is a new alarm or I/O Point state change.

Database (DB) –The DB feature provides additional database functionality beyond that which is included by default. With this feature, you can add database tables and create screens to manage those tables in **Live View**.

System Requirements

Operating System:	*Windows 11 (Pro or Enterprise),* *Windows Server 2019* *Windows Server 2022*
CPU (Processor):	***Minimum:*** *Intel I7 Quad Core 2.8 GHz*
RAM (Memory):	***Minimum:*** *16GB DDR2 800 MHz* ***Recommended:*** *32GB DDR4 SDRAM*
HDD (Disk Space):	***Minimum:*** *200GB & 1TB SATA Secondary Drive* ***Recommended:*** *1TB*
VGA (Video):	***Minimum:*** *1GB VRAM @ 700Mhz* ***Recommended:*** *4GB VRAM DDR3 @ 700MHz*
Display:	*17" VGA (Touch screen optional)*
Input Devices:	*Mouse, keyboard*
Network & Protocols:	*1Gb network adapter with Windows TCP/IP v4*

Note: OSSI will continue to support existing systems that conform to the previous system requirements including Windows 10 (Pro or Enterprise) 64-bit. Everyone is encouraged to migrate to the new system requirements.

A Windows compatible sound device or card is recommended on the Client systems so that alerts and other sounds may be heard.

Display Settings

The minimum supported display setting is 1024x768 with small icons in the taskbar. All Views and screens have been designed for this display setting with a mind to be compatible with most handheld devices. There are a couple dialogs that are only used in configuration and programming that require 1920x1080. These dialogs are not intended to be used during normal day-to-day operations once the system has been configured and programed at which point the minimum supported display applies.

Symbols and Conventions

Notes, Tips, and Cautions

Special comments, or areas that demand extra-close attention, are flagged throughout this manual with separating lines and a boldface keyword, as shown below.

Note: When scanning a set of instructions, pay attention to information separated by lines, as shown here. It may save some time or help avoid common mistakes.

Fonts

Words or phrases that appear as display buttons, keyboard keys, or Nodes appear in **bold**. Words or phrases that appear in drop-down or context menus appear in *italics*.

Display Buttons

In general, when the manual refers to a graphic screen button, the button name and its graphic will be displayed. For example: the **Design View** button located in the Application Menu. The text buttons will be displayed as they appear in the software (e.g. OK).

Software Controls

Some of the procedures contained in this manual specifically mention using the mouse or keyboard to perform actions. As Intelli–Site Lite systems can be configured to use touch-screen monitors in addition to a mouse and keyboard, when this manual refers to "click" or "select", substitute the action "touch."

Using the Mouse

When a mouse is connected to the computer, it will operate the software with minimal use of the keyboard. This manual assumes that a standard two-button mouse will be used for all actions required by the Intelli–Site Lite software. In many cases, there are keyboard shortcut keys that allow the operation of the software without using the mouse.

Data Fields

Intelli–Site Lite Properties dialogs display data fields that permit the addition or modification of data. There are two ways data can be added or modified. Some fields are editable allowing the user to type in them, and others are the targets of drag-and-drop. The drag-and-drop fields are orange. Clicking in a drag-and-drop field may also open a **Select Tree Item** dialog with the possible choices for the target field. The editable data fields display white when enabled, allowing the user to type in the field.

Drop-down lists

Drop-down lists are used with some data fields. The menus are enabled by clicking on a small down arrow at the far right of the field. Click the down arrow to display the menu selections. Click the desired menu selection to display it in the data field.

Checkboxes

Checkboxes  are commonly used on Properties dialogs. They identify when a specific item has been turned on or off, enabled or disabled. Several checkboxes can be selected at one time. Click on the checkbox to select or deselect it.

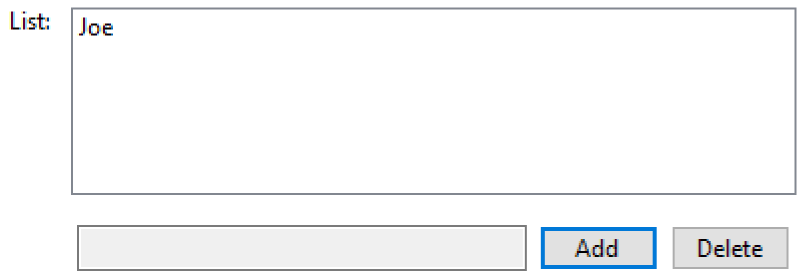
Simple List

A Simple List is a data control to allow the user to define a list. There are two kinds of list boxes: a Drop List and an Edit List.

A Drop List is orange and allows the user to drop Tree nodes onto the control to add it to the list. Clicking on the control will also open a **Select Tree Item** dialog.

The Edit Simple List control allows the user to enter items that are not Tree nodes. It contains the list, and the controls to add, edit and delete items of the list.

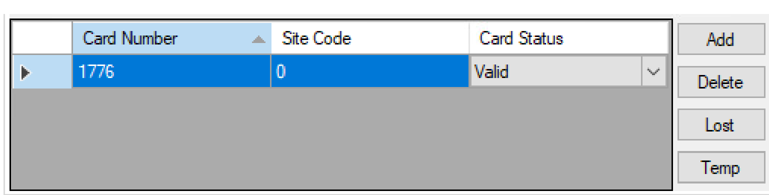
To add an item, click Add. The edit field is enabled allowing the user to enter text. The Add button becomes Save. When the text is entered, click Save and the item is added to the list.



To edit an item in the list, click on it. The edit field is populated with the list item. When the value is modified the Add button becomes Save.

Table

A Table is a data control to allow the user to view or define data with multiple columns. Clicking on a column header will sort the table by that column. Tables are found in many places and in many forms. The table may have buttons associated with it, or it may just present the data rows.



Because the tables are so flexible, the buttons and data in the various tables are explained in detail on an individual basis. It is hoped they are intuitive for the most part.

Intelli–Site Software Components

Intelli–Site is an object-oriented collection of linked software components that communicate using an industry standard, socket interface.

Intelli–Site has six main software components:

- Intelli–Site Engine
- Intelli–Site Driver Service
- Intelli–Site Database
- Intelli–Site Web Service (optional)
- Intelli–Site Client
- Intelli–Site Client Manager Service (optional)

The socket interface allows each software component to reside on the same computer or on several different computers. This gives Intelli–Site extensibility and flexibility.

The Intelli–Site Engine

The Intelli–Site Engine is a Windows Service that is the central hub of the Intelli–Site system. It manages the project information, controls user sessions, and manages the states of the various drivers and system constructs based on data received from sessions and field devices.

There is only one controlling Engine for each Intelli–Site system. If the Intelli–Site system has purchased and licensed the redundancy option, there will be one master Engine. All other Engines will be slaves that monitor and shadow the master. If the master Engine goes offline for any reason, then a slave Engine will take over, becoming the master.

Configuration and maintenance of the Engine is performed via the Configuration Utility. See section The Setup Group for more information.

The Intelli–Site Driver Service

The Intelli–Site Driver Service is a Windows Service that manages communication between the Engine and several panel Drivers. A panel Driver manages communication with specific physical devices. There is a different driver for each device type.

Since the various components communicate using a socket interface, neither the Driver Service nor the Drivers need to run on the same computer as the Engine. For that matter, the Drivers don't need to be on the same computer as the Driver Service. In addition, there can be multiple Driver Services in the Intelli–Site system and multiple versions of each panel Driver. This allows Intelli–Site maximum flexibility and extensibility.

Configuration and maintenance of the Driver Service is performed via the Configuration Utility. See section The Setup Group for more information.

The Intelli–Site Database

Intelli–Site Lite installs and uses PostGreSQL as its database of choice.

Configuration and maintenance of the database is performed via the Configuration Utility. See section The Setup Group for more information.

The Intelli–Site Web Service

Intelli–Site Lite has a web interface with limited capabilities. This interface is provided by the Web Service. The Web Service must be installed and started for this interface to work. The Web Service is managed using the Configuration Utility.

Note: The Web Service log file is in the installation directory in the Web Service folder. To find this folder, click on the Folders menu in the Configuration Utility and select the Open Install Folder option.

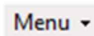
For more information on connecting to Intelli–Site Lite via the web interface, see section The Web Client.

The Intelli–Site Client

The Intelli–Site Lite system has two client interfaces. There are a traditional desktop client and a web interface. The Intelli–Site Web Service allows the User to access the Intelli–Site system via standard web browsers on computers and handheld devices.

The Desktop Client

The Desktop Client provides a graphical user interface that is customizable depending on the skills and knowledge of the end user. The main features of the Client are:



Application Menu - The navigation tool for the Client; see The Application Menu for detailed information

Views - Application windows that combine similar and related aspects and usages of the Intelli–Site Lite system; these Views make using Intelli–Site Lite more intuitive and simple than ever. The Views are accessed via the Application Menu. For more information on each of the Views, please see the section The Views.

Information Manager - Allows the user to monitor system activity and alarm conditions in real-time no matter the current View; see Information Manager for more details.

Installing the Desktop Client Only

The Desktop Client can be installed on a 64-bit or 32-bit OS. It can be on the same computer as the Engine or on an entirely different one.

To install only the Desktop Client, run the Intelli–Site Lite installer. On the **Setup Type** screen, select the *Desktop Client* option.

Configuring the Remote Desktop Client

Immediately upon launching the Desktop Client, the user is presented with the Intelli–Site Lite **Logon** dialog.

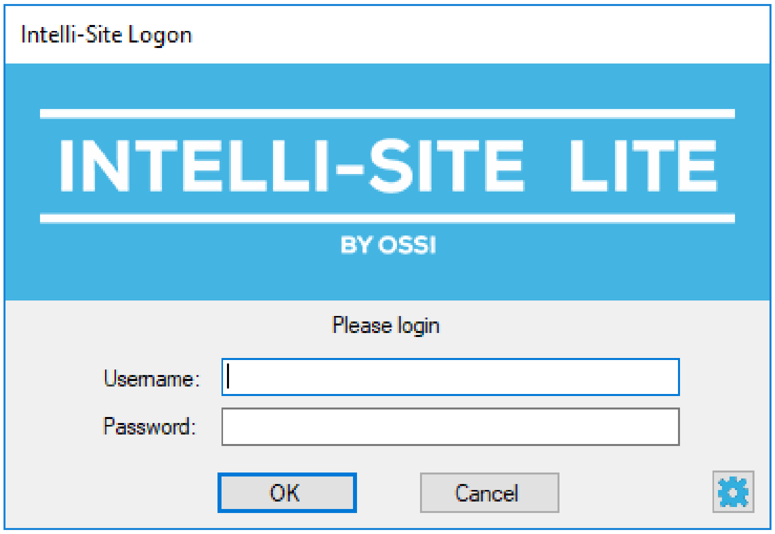


Figure 1 - Intelli–Site Lite Logon dialog

The assumption is made that the Engine Service resides on the local computer. When the user supplies a Username and Password and clicks the OK button, the Client attempts to connect to the Engine Service on the local computer. To change the default client settings, click the button. The **Client Settings** dialog appears.

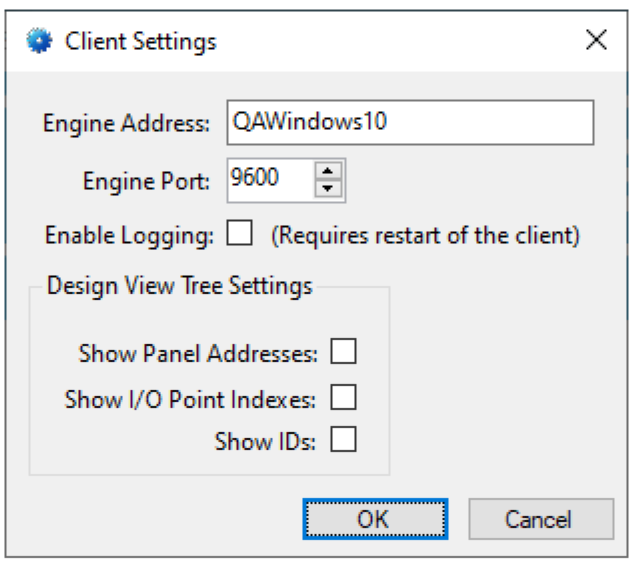


Figure 2 - Client Settings dialog

Engine Address – The IP address or name of the computer hosting the Engine Service

Engine Port- The port number for the Engine Service specified in the Engine Service Settings, see Setup Services. 9600 is the default number and will rarely be anything else.

Enable Logging – If checked, the Desktop Client will log its activity. When this checkbox is changed, the Desktop Client must be restarted for the change to take effect. **DesktopClientLog.txt** will be created in the ***Documents*** folder for the current Windows User. ***Only check at the direction of tech support.***

Design View Tree Settings – When checked, these options will modify how the names of different nodes in the tree will be displayed in **Design View**. When these settings are changed, the Desktop Client must be restarted for the change to take effect.

Show Panel Addresses – This setting will change the way that panels that have addresses are displayed in the tree. The address of the panel is prepended to the name in parentheses. For example, a default Compass Panel would be shown as "(1) Compass Panel" instead of "Compass Panel".

Show I/O Point Indexes – This setting will change the way that I/O points are displayed in the tree. The index of the I/O point is prepended to the name followed by a period. For example, Input 5 would be shown as "5. Input 5" instead of "Input 5".

Show IDs – This setting will change the way that every node in the tree is displayed. The ID of the node is prepended to the name of the node in brackets. For example, Setup would be shown as "[1] Setup" instead of "Setup".

Note: If the Client Manager Service is being used the Engine Address and Engine Port should be set to the Client Manager Service Address and Port.

It is not enough to supply the correct Engine Address and Port. The Intelli–Site Lite system only accepts connections from known sources. Therefore, there must be a Computer node in the Project Node Tree whose **Name** field matches the name of the Remote Client computer. For more information on the Computer node, see Computers.

***Note:** If you attempt to connect from a remote computer or device that is not in the Intelli–Site Lite project, the error message will give the name of the remote computer or device.*

The Web Client

Intelli–Site Lite has a web interface with limited capabilities. This interface is provided by the Web Service. The Web Service must be installed and started for this interface to work. The Web Service is managed using the Configuration Utility.

Once the Web Service is started, you may access the web interface using the latest versions of the following web browsers:

- Chrome
- Internet Explorer (11 or higher)
- Firefox

No other web browsers are supported.

The website URL is documented in the Setup Services of the Configuration Utility. Basically, the website URL is "<*host computer*>/Intelli–Site" where <*host computer*> is the IP address or DNS name of the computer on which the Intelli–Site Web Service is installed.

***Note:** The first time any web browser connects to the Web Service takes a significant amount of time because there is a lot of initialization that must take place that can only happen when the first connection occurs. Subsequent connections occur in a timely manner until and unless the Web Service is restarted.*

Upon successful login, the user is presented with the default View as designated in the user's properties. See Users. After logging in, the user will modify the URL to reach the different web-accessible Views:

- **Access Management View -** <*host computer*>/Intelli–Site/Client/AccessManagement
- **Activity View -** <*host computer*>/Intelli–Site/Client/Activity
- **Live View -** <*host computer*>/Intelli–Site/Client/Live

- **Scheduled Events View -** <*host computer*>/Intelli–Site/Client/ScheduledEvents

The Intelli–Site Client Manager Service

The Intelli–Site Client Manager Service is an optional service. It allows the management of multiple clients by one service, offloading this management from the Engine. It is most useful in a redundant system. Each client will simply connect to the Client Manager Service. The Client Manager Service will keep track of which Engine is the master.

Note: This is an OPTIONAL component. When running, it will count as an active session against the license.

The Configuration Utility

The Configuration Utility manages the Intelli–Site Services and the database installed on the host computer. At a glance, the user can discover which components have been installed and which services are running or stopped.

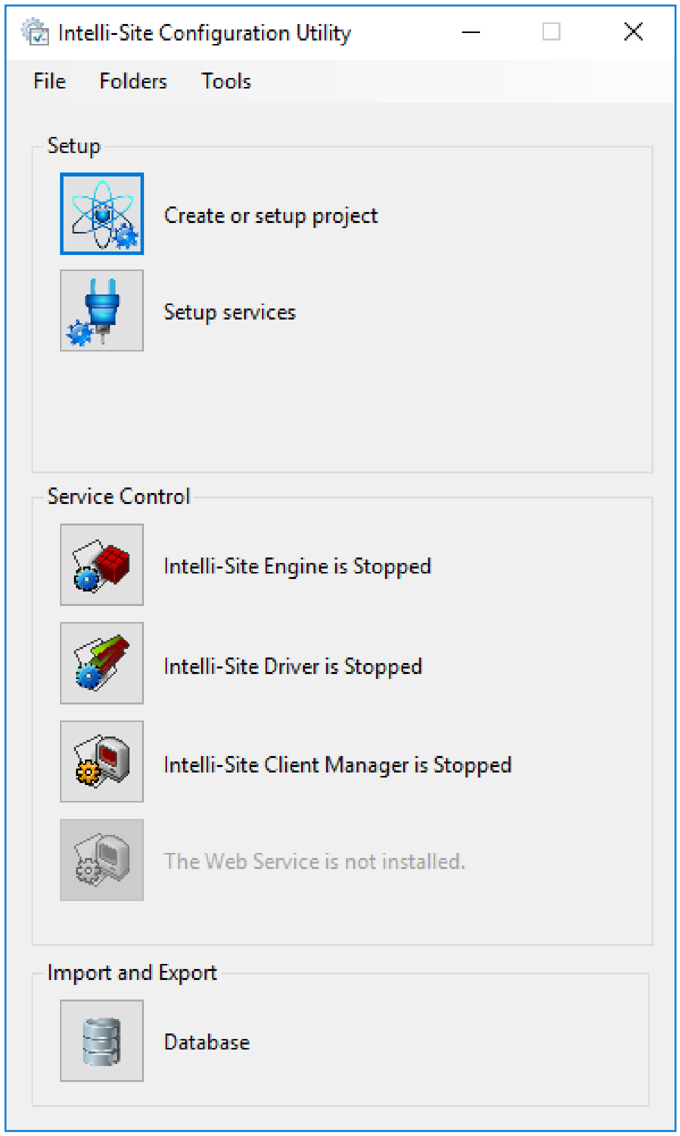


Figure 3 - The Configuration Utility

In the figure above, the Web Service icon is grey which indicates that it is not installed. The Intelli–Site Engine service, Driver Service and Client Manager are installed. The text next to these icons explains the state of the service (Stopped, Started, or not installed).

The Menu Bar

The Configuration Utility menu bar contains three menus:

- File
- Folders
- Tools

File

The File menu is a standard menu for most Windows programs. In the Configuration Utility, the only File menu option is *Exit*.

Folders

The Folders menu provides a quick way to open the folders used by the Intelli–Site system. The folders are:

- *Install folder*
- *Data folder*
- *Projects folder*
- *Logs folder*

Note: The user will only need to open these folders at the request of Tech Support.

Tools

The Tools menu options include:

- *Project Setup…* - opens the **Setup Project** dialog
- *Services Setup…* - opens the **Setup Services** dialog
- *Edit pg_hba.conf – opens the Postgres pg_hba.conf configuration file*
- *Database Backup and Restore…* - opens the **Backup/Restore Database** dialog
- *Create Support Package…* - creates a support package for technical support

Note: The user will only need to use the Edit pg_hba.conf option or Create Support Package… option at the request of Tech Support.

The Setup Group

The Setup Group contains those activities related to the setup and configuration of the Intelli–Site Lite system as a whole. Here you create or setup the project, and setup the various system services.

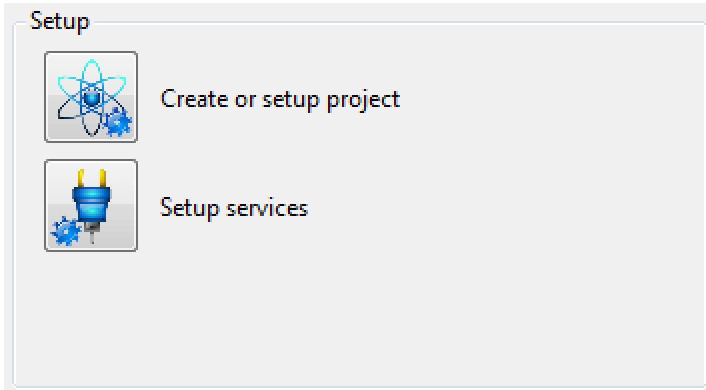


Figure 4 - The Configuration Utility Setup Group

Create or setup project – Used to create multiple projects or modify the current project

Setup services – Used to set the parameters for the Engine, Driver, and Web services

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Note: Both of these options are disabled if the Engine or Driver Service is running. Both Services must be stopped to create or setup a project or to setup the services.

Create or Setup Project

The **Create or setup project** tile allows an integrator to create different Intelli–Site Lite projects on the same computer and/or modify the current project. This is not an option that end-users will use unless directed by Tech Support to do so.

Creating or Modifying a Project

Clicking on the **Create or setup project** tile opens the **Project Setup** dialog.

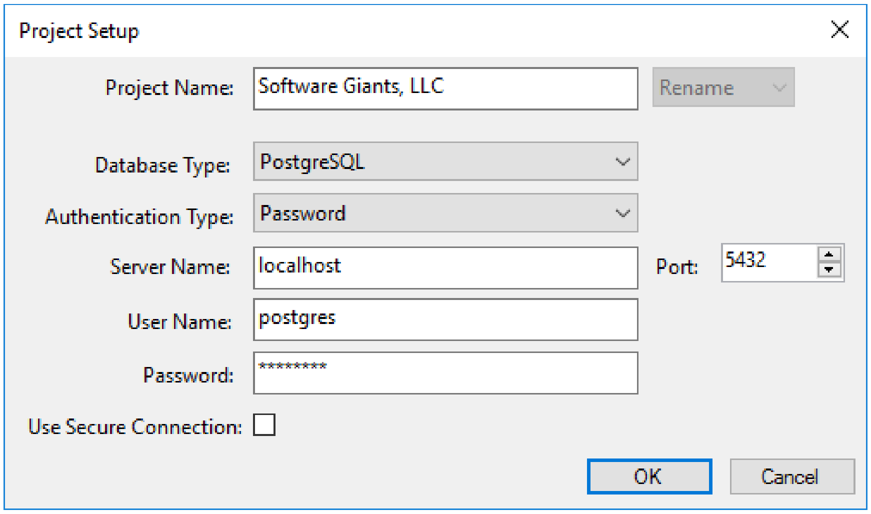


Figure 5 - Project Setup dialog

Project Name – An editable text field where then name of the project is entered

- Drop-down list with two options, *Rename* and *New,* that becomes active when the **Project Name** field is modified; select the desired action to take

Database Type – Drop-down list containing the installed, supported database types; PostgreSQL is the default database installed with Intelli–Site Lite

Authentication Type – Drop-down list of the possible authentication types; Password is the default value

Server Name – The name of the computer on which the database resides; the default is the localhost

User Name – The user name to use during authentication with the database if an authentication type is specified

Password – The password to use during authentication with the database if an authentication type is specified

---

Note: The Project Name and Rename/New are the two fields that will be changed on a regular basis. The default values for the other fields are correct for most installations.

OK - Save the changes and create or rename the project

Cancel - Abandon the changes, do not create or rename the project

Selecting the Current Project

When there are two or more projects detected by the system, the current project is displayed on the main window.

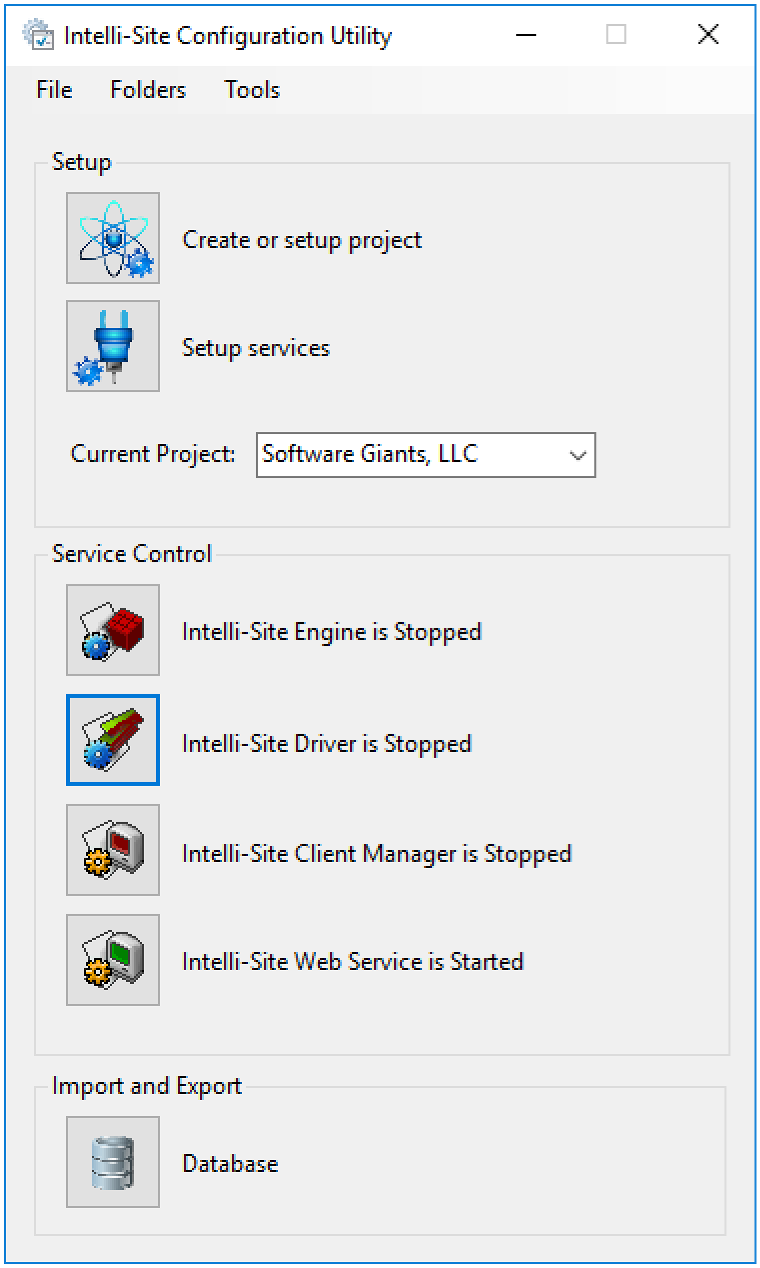


Figure 6 - Configuration Utility main window with multiple projects

When the Intelli–Site Engine Service is stopped as in the above figure, the Current Project field is a drop-down list containing the list of the available projects. The current project is the selected project.

When the Engine Service is running, the Current Project field is disabled but still displays the project that the Intelli–Site Lite software is using.

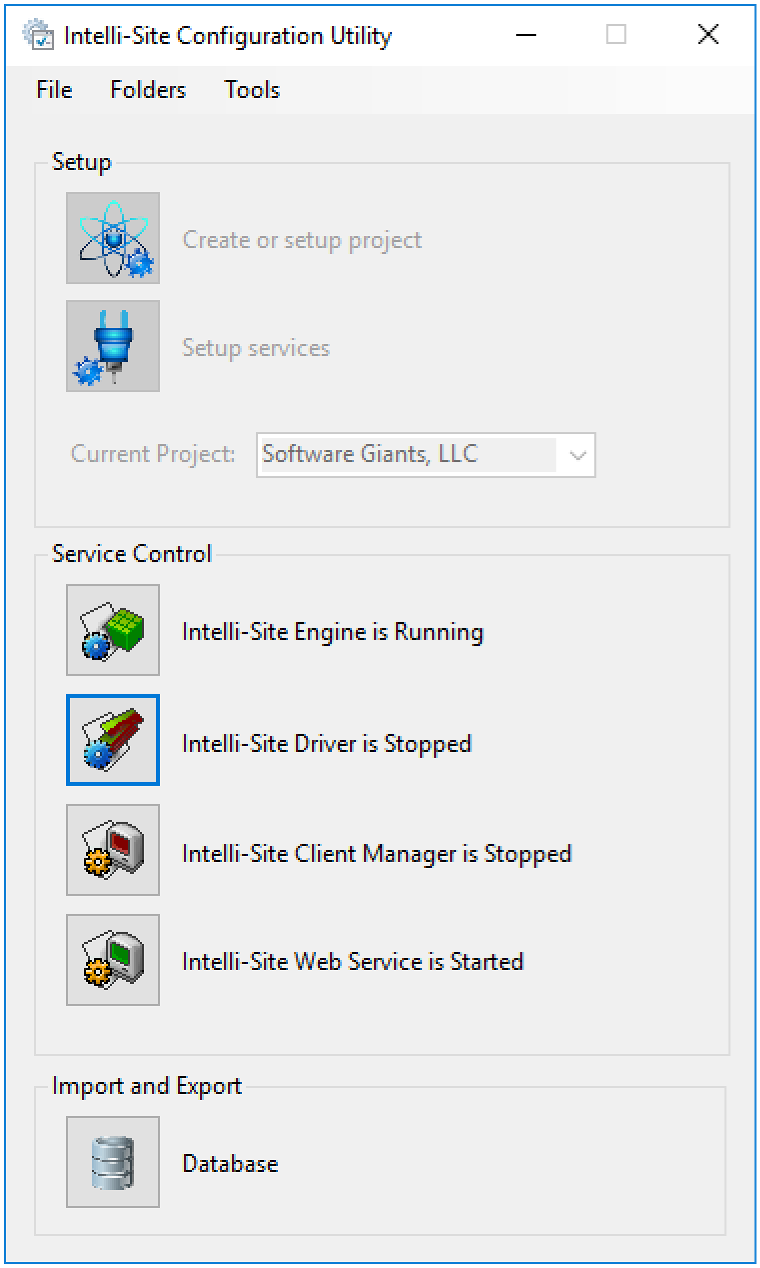


Figure 7 - Current Project when the Engine Service is running

Setup Services

The Engine Service, the Driver Service, and the Client Manager Service each have tune-able parameters. These parameters can be modified using the **Setup services** tile.

Note: The Setup services tile is disabled until the Engine, Driver, and Client Manager Services are stopped.

Clicking on the **Setup services** tile opens the **Service Setup** dialog.

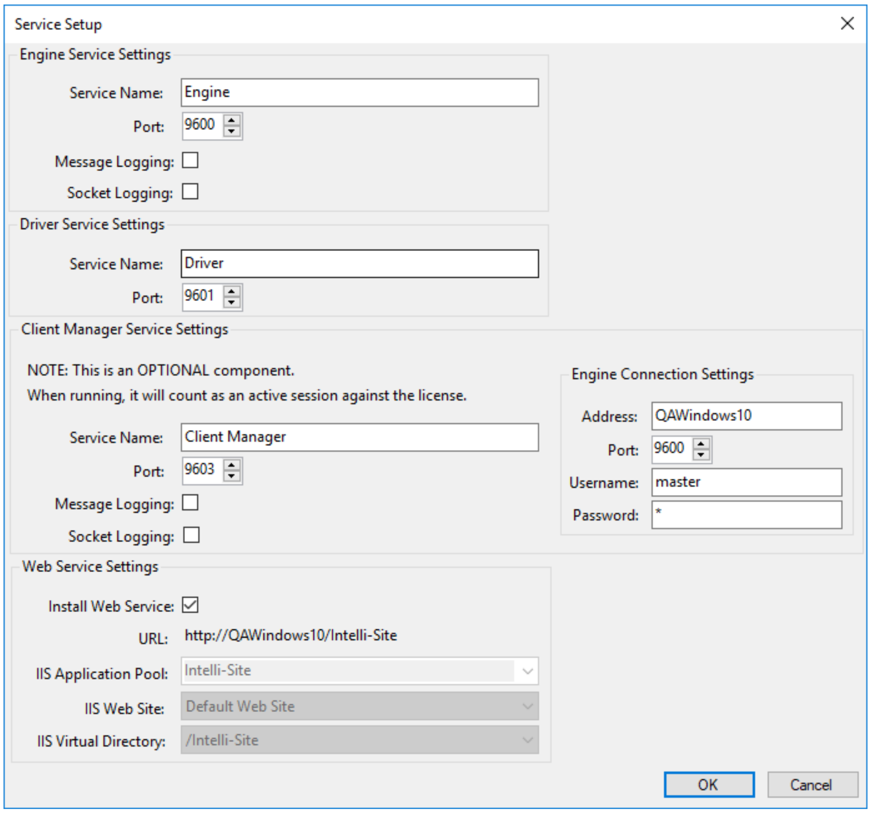
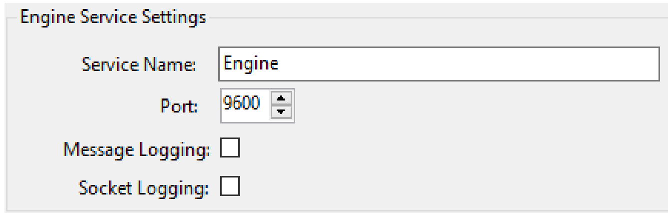


Figure 8 - Service Setup dialog

Note: The default settings will satisfy the requirements of nearly every installation. On rare occasions they may need to be modified. Do so with great caution.

Engine Service Settings Group

The **Engine Service Settings** group contains the parameters that can be adjusted for the Engine Service.



Service Name – The name for the Engine Service

Port – The TCP port number that the Engine Service listens to for connections from the Client Manager; the Client Manager handles the communication between the Engine and the Desktop Client and the communication between the Engine and the Web Service

Message Logging – Troubleshooting tool; when this checkbox is selected, all messages are written to the EngineServiceMsg.log file in the Logs folder

Socket Logging – Troubleshooting tool; when this checkbox is selected, all socket traffic is written to the EngineServiceMsg.log file in the Logs folder

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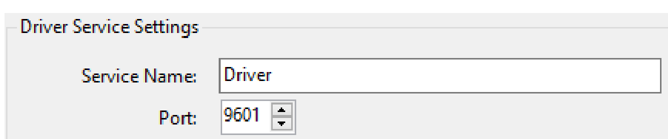
Note: Only select the logging options at the request of Tech Support. Doing so will affect the performance of the Intelli–Site Lite system.

Driver Service Settings Group

The **Driver Service Settings** group contains the parameters that can be adjusted for the Driver Service.

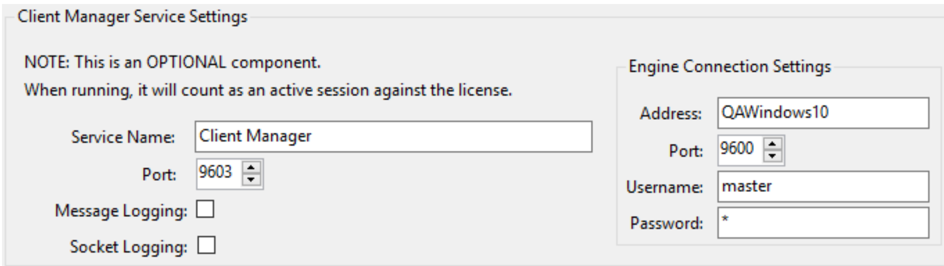


Service Name – The name for the Driver Service

Port – The TCP port number that the Driver Service listens to for connections from the Engine; every Driver Service in the Intelli–Site Lite system must use the same port number

Client Manager Service Settings Group

The **Client Manager Service Settings** group contains the parameter for the Client Manager Service to connect to the Engine and those parameters that govern where the Desktop Client will connect to the Client Manager Service.



Service Name – The name for the Client Manger Service

Port – The TCP port number that the Client Manager Service listens to for connections from the Desktop Client; the Client Manager handles the communication between the Engine and the Desktop Client and the communication between the Engine and the Web Service

Message Logging – Troubleshooting tool; when this checkbox is selected, all messages are written to the EngineServiceMsg.log file in the Logs folder

Socket Logging – Troubleshooting tool; when this checkbox is selected, all socket traffic is written to the EngineServiceMsg.log file in the Logs folder

---

Note: Only select the logging options at the request of Tech Support. Doing so will affect the performance of the Intelli–Site Lite system.

Engine Connection Settings group

Address – The computer name or IP address of the host computer for the Engine service

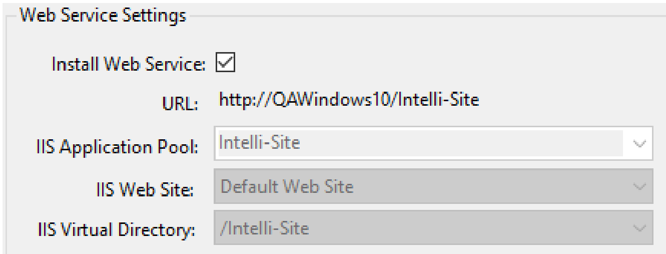
Port – The TCP port number on which the Engine is listening for connections

Username – The username the Client Manager Service will use to logon to the Engine

Password – The password used to authenticate the username when the Client Manager Service logs in to the Engine

Web Service Settings Group

The **Web Service Settings** group contains the parameters governing the Web Service.



Install Web Service – Checkbox that indicates the installation status of the Web Service

URL – The URL for the Intelli–Site Web Service

IIS Application Pool - A grouping of URLs that is routed to one or more worker processes; application pools significantly increase both the reliability and manageability of a Web infrastructure

IIS Web Site - A unique collection of Web pages and Web applications that is hosted on an IIS Web server; web sites have bindings that consist of a port number, an IP address, and an optional host name or names

IIS Virtual Directory – The directory name (also referred to as path) that specified in Internet Information Services (IIS) and map to a physical directory on a local or remote server; the virtual directory name becomes part of the application's URL

Note: The Web Service Settings are presented as information only. Any other IIS settings are not supported.

The Service Control Group

The Service Control Group is used to start and stop the components of Intelli–Site Lite that are system services. It also allows the User to tell at a glance if a system service is running or if the system service is installed.

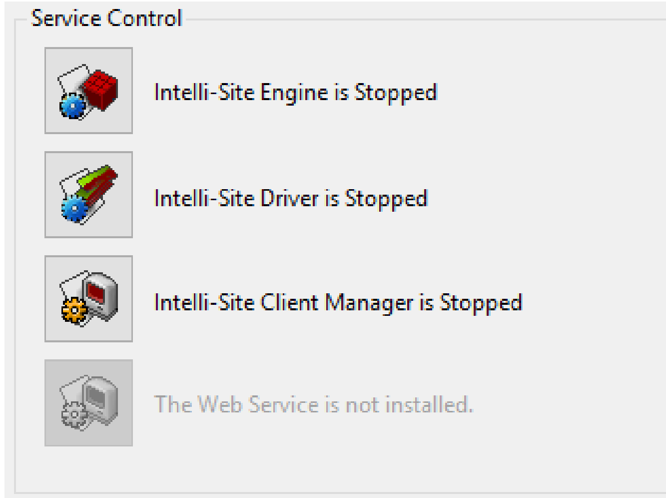


Figure 9 - The Configuration Utility Service Control Group

In the figure above, notice that the Web Service is not installed. If any of the services is not installed on the local computer, that component will be gray and inactive.

The text next to the button indicates the state of the service. The state is Stopped, StartPending, or Running. The StartPending state is a temporary state that occurs while the service is starting or stopping.

To start a stopped service or stop a running service, click the appropriate tile. The top tile is the Engine; below it is the Driver Service, then the Client Manager Service. The bottom tile is the Web Service which allows Users to connect using standard web clients.

The Import and Export Group

The Import and Export Group allows the user to backup and restore the Intelli–Site Lite database.

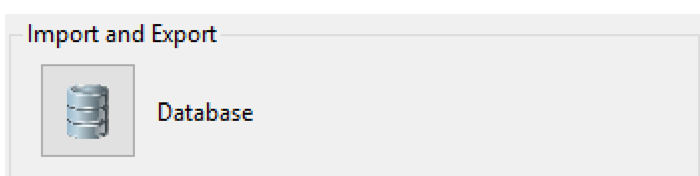


Figure 10 - The Configuration Utility Import and Export Group

When the Database button is clicked, the **Backup/Restore Database** dialog opens.

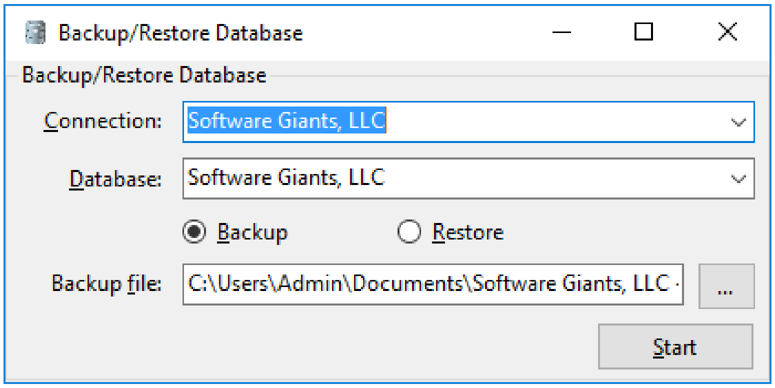


Figure 11 - Backup/Restore Database dialog

Connection – Which pool to use; connection pooling optimizes the connecting to the database by allowing physical connections to be reused if available

Database – Which of the databases to backup or restore

Backup – Radio button to select the action

Restore – Radio button to select the action

Backup file – The name for the backup file

 - Opens the Save dialog to specify the location and name of the database backup file

 - Initiate the backup/restore

Note: If the Engine is running when backup is initiated, you will be given the option of stopping the Engine and continuing or canceling the backup. After the process is completed, the Engine is restarted. If the Engine was manually stopped, then it is still stopped.

The Application Menu

The Menu Application Menu is the main navigation tool for the Intelli–Site Client. Through this menu you may login to or out of the Intelli–Site Lite system, exit the client, open the **About** dialog, or open any of the Views after login.

Note: A View is a window dedicated to particular aspects and usages of the Intelli–Site system. For more information and detailed usage of the Views, see the section The Views.

To open the Application Menu, click on the Menu button in the lower left-hand corner of the Client screen. Application Menu options are (in menu order from top to bottom):

Live View – The window that displays the user-defined graphical interface to manage and monitor the Intelli–Site Lite System

Access Management View – The window where all aspects of access management are controlled:

- Holidays & Time Zones
- Access Sets
- Personnel & Tokens (aka Cards)

Hardware Management View – This window combines the configuration and monitoring of the drivers and panels.

Activity View - The user can monitor the activity of the system in real-time.

Scheduled Events View – This window manages the events and the calendar by which these events are set and cleared.

Design View – This window provides complete access to the Project Tree. The screens for **Live View** are created and managed here.

Documentation View - The Intelli–Site Lite manual and panel guides are accessible through the **Documentation View**. The integrator is encouraged to create a usage guide for the specific installation. The usage guide can be added to the Project, and the end user can access it through this View as well.

Reports View – The window in which the Intelli–Site Lite reports are generated and viewed

Logon/Logoff – Logon/Logoff Intelli–Site Lite system

About – Display the **About** dialog; contains the EULA, Intelli–Site Lite version information, and the license information

Exit – Shutdown the Client, logoff if necessary

Note: If the logged in user does not have access to a View, that View will not be listed in the Application Menu. For example, the default user, master, does not have access to Video View. Video View is not listed in the Application Menu. The Views are enabled or disabled via the User View Options property. See ***User View Options.***

The Views

A View is a window dedicated to related aspects and usages of the Intelli–Site Lite system. There are nine (9) Views in all. A View is opened using the Menu Application Menu found in the lower left-hand corner of the Client.

This section explains each View in detail.

Access Management View

Access Management View is the window in which all access management activities are managed. Personnel, Tokens, and Access are all managed in **Access Management View**. The **Access Management View** window has three (3) tabs.

- ***Personnel & Cards***
- ***Holidays & Time Zones***
- ***Access Sets***

This section discusses these three tabs in detail. It also explains managing personnel, tokens and access.

Note: What a user can see and do in this View is configurable in the User View Options field on the user's properties dialog. See User View Options.

Personnel & Cards Tab

Personnel and tokens are managed on the ***Personnel & Cards*** tab of **Access Management View**. A token is a credential that can be assigned to a specific person. Cards and RFID tags are two (2) examples of tokens. Token and card are used interchangeably in this document.

Access sets are assigned to tokens here. Badges are specified and printed for personnel here as well. And in the event a token is lost, it is marked as lost in this View. Temporary cards can be assigned here too!

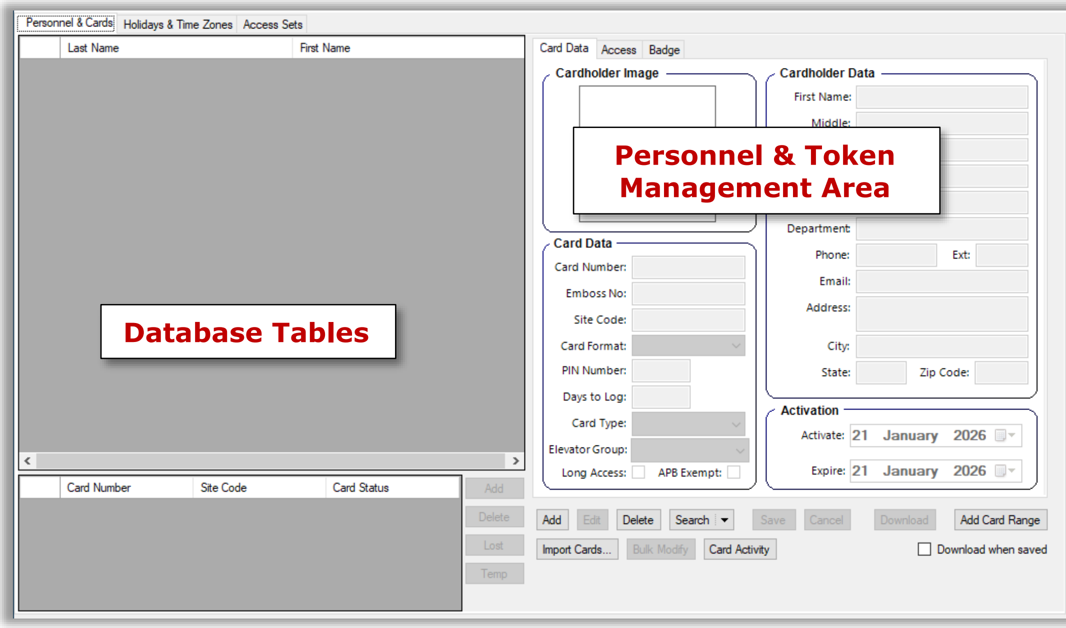


Figure 20 - Access Management View: Personnel & Cards tab

Database Tables – Two (2) lists containing the records in the database

Personnel Table – List of personnel in the database

Token Table – List of tokens associated with the personnel record highlighted in the Personnel Table; tokens are stored in the database

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***Note:** The Token Table is only present in multi-ID mode. In multi-ID mode, a person may have more than one token assigned to them. In single ID mode, a person may have only one token assigned. This token is listed in the Personnel Table. See the System Options group of the Setup node in the Project Node Tree.*

Personnel & Token Management Area – Displays the data for the selected personnel and token; area where personnel and token data is added, edited, and deleted

Personnel Table

The Personnel Table is a list of all personnel in the database. The columns are Last Name and First Name. If Intelli–Site Lite is in Single ID Mode, a third column for Card Number is added.

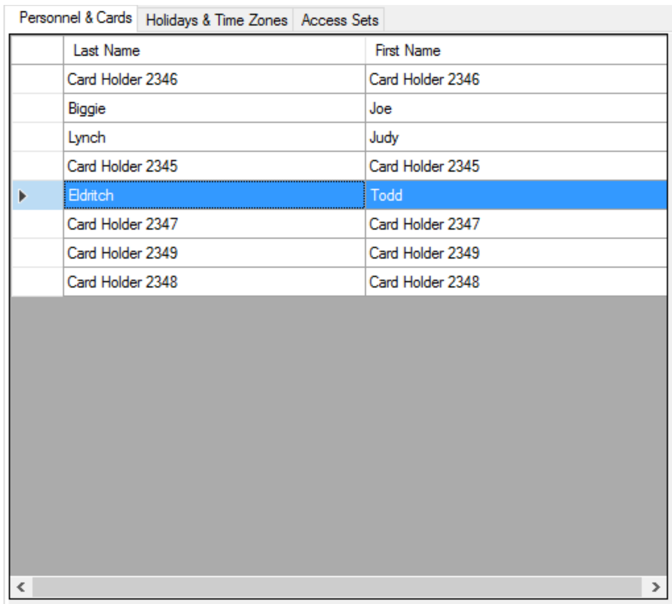


Figure 21 - Personnel Table

The table is not sorted when this View is opened. To change the sorting key, click on the column header. The table is sorted in ascending order by the column header clicked. Clicking on the same column header again will reverse the sort order. An arrow in the column header indicates the sort order.

When a row is highlighted in the Personnel Table, that person's data is displayed in the Personnel & Token Management Area to the right of the table. A row is highlighted by clicking on it or using the up and down arrow buttons. It is possible to select multiple rows using the standard shift+click and Ctrl+click methods.

Use the buttons in the Personnel & Token Management Area to manage the personnel in the Personnel Table.

There is also a context menu for this table.

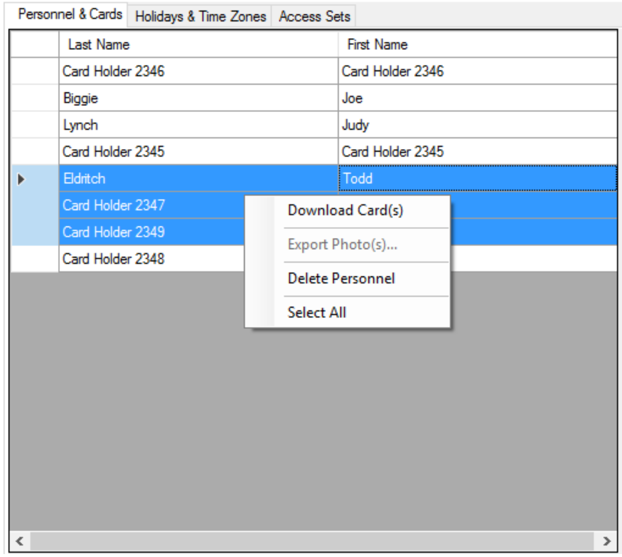


Figure 22 - Personnel Table Context Menu

Download Card(s) – Download the tokens held by the selected personnel records

Export Photo(s) – Export the photos of the selected personnel; enabled if the user has the **Photo Maintenance** User View option enabled

Delete Personnel – Delete the selected personnel record(s) including tokens

Select All – Select every personnel record

Token Table

The Token Table lists the tokens associated with the person highlighted in the Personnel Table. The columns are Card Number, Site Code, and Card Status. The table is sorted by Card Number. To change the sorting key, click on the column header. Sort the table in ascending order by clicking on a column header. Clicking on the same column header again will reverse the sort order. An arrow in the column header indicates the sort order.

A token cannot exist in the system unless it is associated with a person. When a person is added and saved, the first token for that person is usually added as well.

Token Table Context Menu

There is a context menu for this table as well.

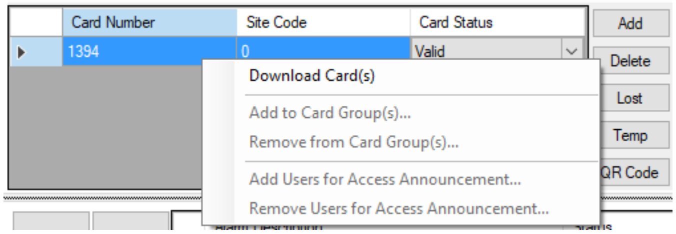


Figure 23 - Token Table Context Menu

Download Card(s) – Download the selected card(s)

Add to Card Group(s) – Not Yet Implemented Brings up a dialog to allow the user to specify card group or groups to add the selected card(s)

Remove from Card Group(s) – Not Yet Implemented Opens a dialog to allow the user to remove the selected card from a card group or groups

Add Users for Access Announcement... - Not Yet Implemented Opens a dialog to add to the list of users that will hear an announcement when the selected card is used; the user must be logged in to the Intelli–Site Lite system to actually hear the announcement. Intelli–Site Lite is powerful, but not that powerful.

Remove Users for Access Announcement... - Not Yet Implemented Opens a dialog to remove users from the list that will hear an announcement when the selected card is used

Token Table Buttons

All tokens must be assigned to a person. These tokens are stored in the database and displayed in the token table. A person can have more than one token in multi-ID mode. The buttons to the immediate right of the token table manage the tokens themselves, not the access assigned to them.

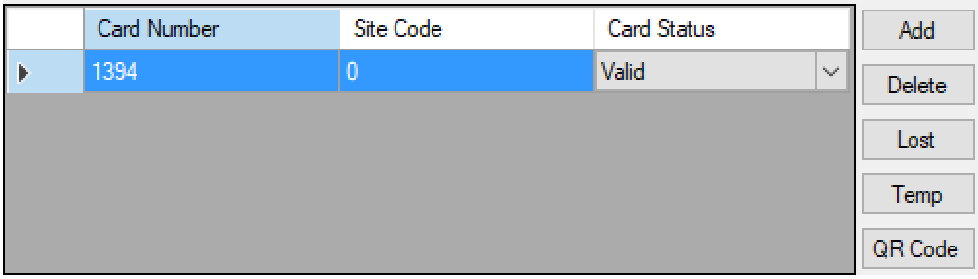


Figure 24 - Token Table Buttons

The buttons will be disabled or enabled depending on the conditions surrounding the activity.

Add - Add a token record to the highlighted personnel; always enabled; when pressed, the **Card Data** and **Activation** fields are activated; enter the token information then click Save. The new token will appear in the token table.

Delete - Delete the selected token; enabled if there is a token assigned to the highlighted personnel; when pressed, a **Confirm Card Delete** dialog displays.

Lost - Mark the selected token as lost and issue a replacement with the same access rights; See Reporting a Lost Card

Temp - Assign a temporary token to the person; See Assigning a Temporary Card

QR Code - Only present when a personnel is selected; create a temporary card access badge for the highlighted personnel; particularly helpful for visitors; See Assigning a QR Code

Personnel & Token Management Area

The Personnel & Token Management Area displays the data for the selected personnel and token. There are several different data tabs that are used to manage the data. Which tabs are visible can be enabled on a user-by-user basis using the User View Options of the user's properties dialog.

- ***Card Data*** – Information pertaining to the personnel and the card
- ***Access*** – Access Sets assigned to the card

- ***Badge*** – Manages the personnel's badge
- ***Activity –*** Displays, in real-time, the readers at which this card has been read
- ***Vehicle –*** Manages the vehicles associated with this card
- ***Card Groups –*** Card groups to which this card belongs

Additional user-defined tabs may be added. See Cardholder Control.

The Personnel & Token Management Buttons

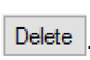
The band of buttons below the tabs in the Personnel & Token Management Area governs the actions that can be performed. These buttons apply to all tabs in the Personnel & Token Management Area.

Figure 25 - Personnel & Token Management Buttons

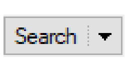
The buttons will enable and disable automatically depending on the conditions surrounding the activity.

- Add a personnel record; enabled when the current personnel record or token is not being modified; when pressed, the fields on the tabs are cleared and activated

- Edit the selected personnel record and token; enabled when a single personnel is selected and no other action is taking place; when pressed, the fields on the tabs are activated and contain the data for the selected personnel record



- Delete the selected personnel record and all associated tokens; enabled when a single personnel record is selected, and no other action is taking place



- Search the personnel and token database for the specified information; enabled when no other action is taking place. The default matching criteria is "begins with" for text field. The '%' wildcard can be used at the beginning of a string to change the criteria to "must contain". For drop-down lists and date-time fields, the matching criteria is an exact match.

Notice the ▾. This opens a drop-down menu to allow the user to search based on activation date or deactivation date. Normally the search is an exact match of these fields. Choosing one of the other options allows the user to find all records that meet the Card Data and Cardholder Data criteria as well as before or after the selected date. This is especially useful when trying to find all the cards that are about to expire!

Once the Search ▾ button is clicked, the Save button becomes the Query button. Enter the search criteria then click this button. A new Clear Query button appears which, when clicked, clears the query and exits search mode.

Save - Save the modifications; enabled when a record is being added or edited

Cancel - Cancel the current action; enabled when a record is being added, edited, or during a search

Download - Download the selected personnel's token and access set assignments; only the displayed token is downloaded even if the selected person has more than one associated token

Download when saved – Checkbox; when checked, the token will be downloaded automatically when it is saved

Add Card Range - Add personnel and token records for all cards in a specified range

Import Cards... - Import personnel and token data from a properly formatted, tab-delimited file

Bulk Modify - Modify the cardholder data for all selected personnel records; disabled until more than one personnel record is selected

Card Data Tab

The ***Card Data*** tab contains information specific to the personnel and the token associated with said personnel.

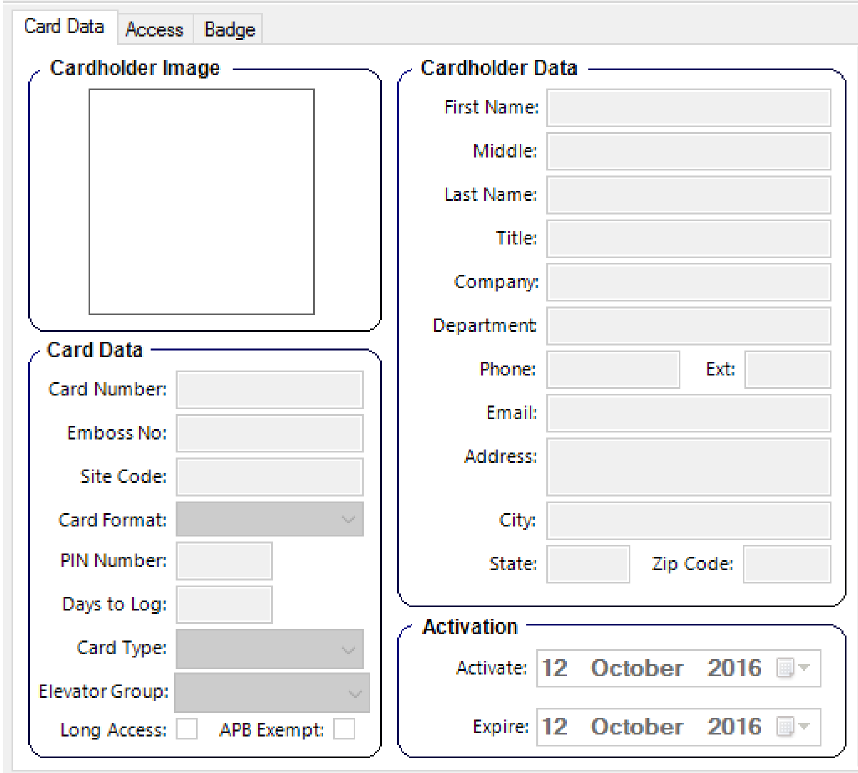


Figure 26 - Card Data tab

Cardholder Image – The image associated with the selected personnel; not a required field; the user must have Photo Maintenance enabled to add/edit/delete the Cardholder Image See User View Options.

Cardholder Data Group –The personnel data; stored in the Personnel database

First Name – The personnel's first name

Middle Name – The personnel's middle name

Last Name – The personnel's last name

Title – The personnel's title

Company – The name of the company

Department – The name of the department

Phone – The phone number for the personnel

Ext – The phone extension for the personnel

Email – The email address for the personnel

Address – The address of the personnel; multiple lines are allowed

City – The city of the address

State – The state in which the city exists

Zip Code – The Zip Code (seriously, you're reading this?)

Note: None of the Cardholder Data Group fields are required.

Card Data Group – The information specific to a card

Card Number – *Required;* numeric; the card number

Note: It is possible to add a person without a token by setting the Card Number equal to zero (0).

Emboss No – numeric; the Emboss number

Site Code – *Required;* numeric; the card's Site Code

Card Format – *Required;* drop-down list; the possible Card Formats

PIN Number – numeric; the personal identification number for the card

Days to Log – numeric; the number of days to display on the ***Activity*** tab. The ***Activity*** tab data is loaded along with all the other card data when a card is selected. Keeping this number low improves performance. This does not affect the history database. All activity is logged and kept in the active database or the archive.

Card Type – drop-down list; the possible Card Types; the initial values are *Normal*, *Visitor*, *Guard*, and *Supervisor*. This list can be edited on the Card Data screen.

Elevator Group – drop-down list; the possible Elevator Groups; this list can be edited on the Card Data screen

Long Access – checkbox; when checked, this card allows the holder more time to go through a door

APB Exempt – checkbox; when checked, this card is exempt in Anti-Passback

Activation Group – date/time; the activation and deactivation dates for the selected card

Access Tab

The ***Access*** tab allows the user to assign Access Sets to a token. The access sets listed in the Assigned Access Sets list box are the access sets assigned to the selected token.

Note: Access Sets are assigned to tokens not personnel. Therefore, make sure the correct token is selected in the Token Table when assigning access sets.

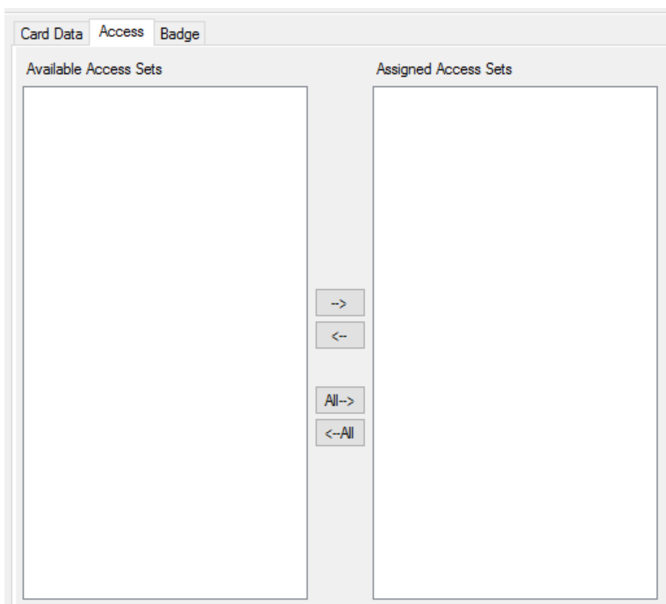


Figure 27 - Access tab

Available Access Sets – List box containing the access sets that have not been assigned to the selected token

Assigned Access Sets – List box containing the access sets assigned to the selected token

--> - Move the selected access set(s) in the Available Access Sets list box to the Assigned Access Sets list box

<-- - Move the selected access set(s) in the Assigned Access Sets to the Available Access Sets

All--> - Move all access sets in the Available Access Sets list box to the Assigned Access Sets list box

<--All - Move all access sets in the Assigned Access Sets list box to the Available Access Sets list box

Badge Tab

Intelli–Site Lite allows badging features to enhance a card access security system. Photo identification (ID) permits verifying the identification of a card holder and recognition of unauthorized personnel.

The ***Badge*** tab allows the user to create a badge for the selected personnel.

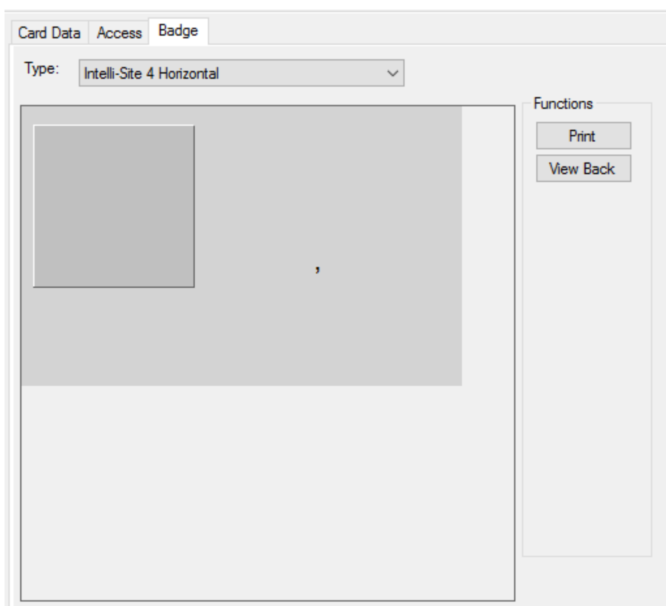


Figure 28 - Badge tab

Type – drop-down list; the available badge types; the available badge types can be found in the Project Node Tree under Cardholder Control->Badges in **Design View**; additional user-defined badge types can be added.

Functions Group Box – The functions that can be performed on a badge

Print - button; opens the standard Windows Print dialog so that a badge can be printed; assumes there is a badge printer attached to the local computer

View Back or View Front - button; displays the back/front of the badge; the button changes depending on which side of the badge is currently displayed

Search the Personnel and Token Databases

The user can search for a specific personnel record or token or all personnel and tokens that match a set of search criteria. Pressing the Search button initiates the process.

When the Search button is clicked, the fields on the ***Card Data*** tab are enabled, allowing the user to enter the search criteria. In addition, buttons are modified or added.

The Query button replaces the Save button. When the Query button is pressed, the database is searched using the supplied data. When a record is found that matches the supplied data, that personnel record, and associated token record if appropriate, is put in the database tables. All records that match the search criteria are shown in the database tables.

Each field in which data has been entered is used in the query; the fields are matched as "begins with" the supplied data. For example, entering "1" in the **Card Number** field will match all card numbers that begin with the number 1.

The Personnel Table and Token Table are populated with records that match the search criteria.

The button, Clear Query, appears after the Query button has been pressed. When Clear Query is pressed, the search criteria are erased, and the personnel and token tables display the full database.

Import Cards

Personnel and tokens can be imported into Intelli–Site Lite from a properly configured, tab-delimited file. A properly configured, tab-delimited file consists of:

- **Tab-delimited**: Each column in a row is separated by a tab character; most spreadsheets and database can generate tab delimited files
- **Header Row**: The first row is the header row which defines the mapping between the columns of the file and the database fields. Use the field name as it appears on the screen in **Access Management View**. This corresponds to the **Name** field in the properties of each field in the database. The actual database field name can be used instead of the **Name**.

  The possible database fields can be found in the Project Note Tree in **Design View**. Expand **Setup**->**Database**. There is only one node here. It is named for the Intelli–Site Lite project. Expand it to reveal the **Tables** node. Expand the **Tables** node to reveal the tables. Importing is limited to the **Card** and **Personnel** tables. Expand these nodes to see the possible fields. Not all the fields can be imported. If the user attempts to import into an invalid field, an error will occur, and the import will be aborted.

- **Data Rows**: The second and subsequent rows contain the data to import. The data is delimited by tabs and matches the header row.

Note: If a column maps to an image in the database, provide a fully qualified filename for said image (e.g. C:\Users\Public\Pictures\Sample Pictures\Koala.jpg). Intelli–Site Lite will import the image using the supplied filename.

Add Card Range

Intelli–Site Lite allows the user to add many token records automatically. It also adds a personnel record for each token record since a token record cannot exist without a personnel record. The personnel records can be created using another personnel record as a template.

If desired, select a personnel record to serve as the template. Click the Add Card Range button. The **Add Card Range** dialog appears.

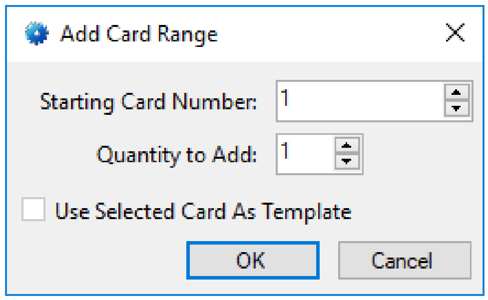


Figure 29 - Add Card Range dialog

Starting Card Number – numeric; the number for the first card to add

Quantity to Add – numeric; total number of new cards to add

Use Selected Card As Template – checkbox; when checked, the data of the selected card will be used for the new personnel and token records

When OK is clicked, the new personnel and token records are added to the database. The **Card Number** field contains the appropriate card number. The **First Name** and **Last Name** fields contain *Card Holder <card number>*. If a template was not specified, the **Activate** and **Expire** fields are set to the current day. If a template was selected, all other Card Data fields are set to the data of the template record.

Bulk Modify Selected Records

Modifying the same field on several records is tedious and time consuming. Intelli–Site Lite allows the user to modify **Cardholder Data** fields of multiple records simultaneously using the Bulk Modify button.

When more than one personnel record is selected, the Bulk Modify button is enabled. Clicking this button activates the Cardholder Data fields. The user can then enter the data to assign to all the selected records. Clicking Save causes the data from the modified fields to overwrite the same fields in each of the selected records. Cancel abandons the modifications.

Holidays & Time Zones Tab

Holidays and Time Zones are managed on the ***Holidays & Time Zones*** tab. Holidays and time zones are important since the way a facility is accessed is different based on holidays, the day of the week, and the time of day.

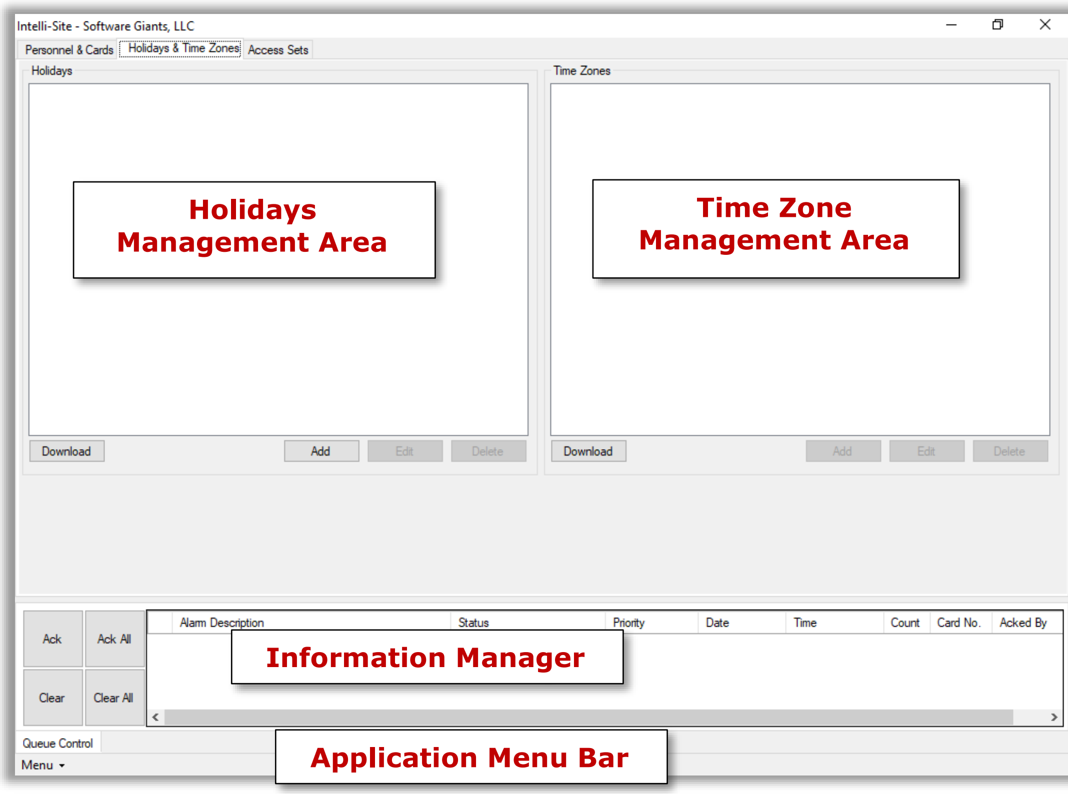


Figure 30 - Holidays & Time Zones tab

Holidays Management Area – Holidays are listed, added/edited/deleted, and downloaded to field devices here

Time Zone Management Area – Time zones are listed, added/edited/deleted, and downloaded to field devices here

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

Application Menu Bar – Contains the Application Menu and the status of the license and SMA; see The Application Menu

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 must be entered.

The Holiday Management Area contains:

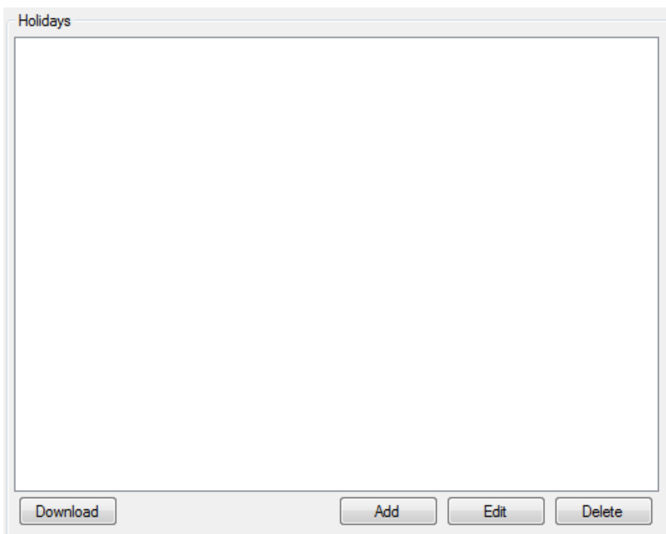
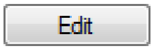


Figure 31 - Holidays Management Area

Holidays – List box of holidays defined in the Project; each holiday listed shows the Name and Start Date – End Date; if Start Date equals End Date, only Start Date is displayed

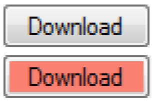
Note: Some access control panels do not include the year with the date for holidays. In this case, holidays cannot span year boundaries. Refer to the Panel Guide for information on how your access control panels handle holidays.

- Add a holiday to the Project; opens the properties dialog for the new holiday



- Edit the selected holiday; opens the properties dialog for the selected holiday

- Delete the selected holiday; opens a **Confirm Delete** dialog



- Download the holiday list to the field devices; becomes when changes to the holiday list need to be downloaded to at least one field device; will remain this way until the changes have successfully downloaded to all existing field devices

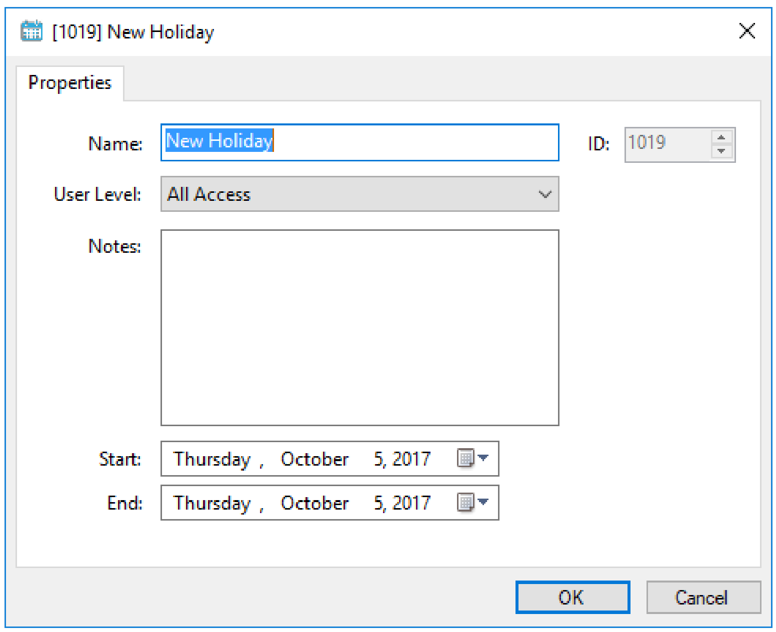


Figure 32 - Holiday Properties dialog

Time Zones

Time Zones are managed using the Time Zones Management Area. As soon as one access control panel is added, the default time zone, *Always*, is added to the time zone tree. This is a special time zone. Please do not edit or delete it. Ever.

A time zone contains at least one time line that defines the days of the week, and the start and end times that this time line covers. Each time line also may or may not apply to holidays. For details on defining time zone and time lines, see the specific Panel Guide.

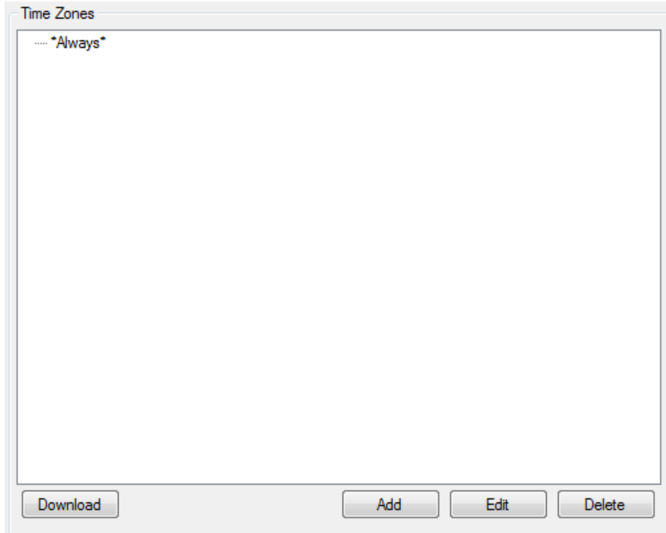


Figure 33 - Time Zone Management Area

Time Zones – List box displaying the time zones tree; each time zone can be expanded to reveal the time lines of the specific time zone

- Add a time zone to the Project; opens the properties dialog for the new time zone

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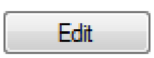
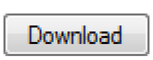
***Note:** The properties dialog for the time zone is different for each access control panel. See the appropriate Panel Guide for exact details.*

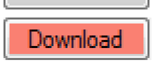


- Edit the selected time zone; opens the properties dialog for the selected time zone

- Delete the selected time zone; opens a **Confirm Delete** dialog



- Download the time zones to the field devices; becomes



when changes to the time zones need to be downloaded to at least one field device; will remain this way until the changes have successfully downloaded to all existing field devices

Access Sets Tab

Access entries and access sets are created and managed on the ***Access Sets*** tab. Access entries are specific to an access control panel. Each access control panel should have at least one access entry defined for it. These access entries are grouped together to create access sets. It is access sets that are assigned to tokens or cards.

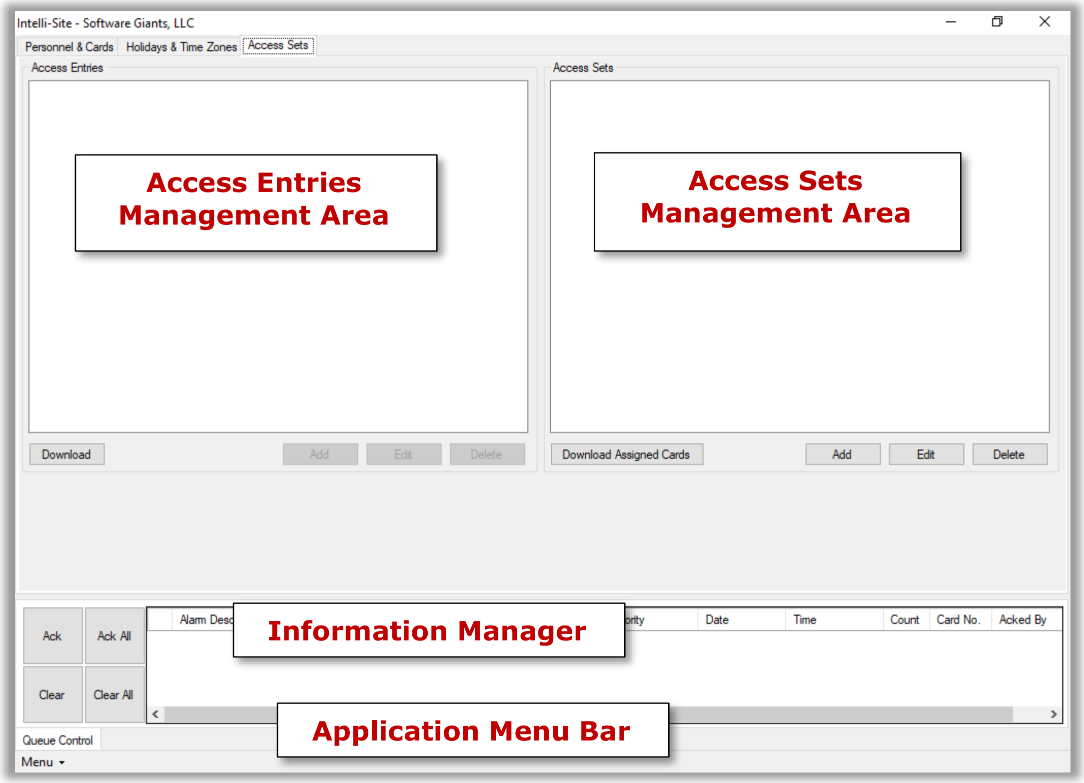


Figure 34 - Access Sets tab

Access Entries Management Area – Access Entries are listed, added/edited/deleted, and downloaded to field devices here

Access Sets Management Area – Access Sets are listed and added/edited/deleted here

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

Application Menu Bar – Contains the Application Menu and the status of the license and SMA; see The Application Menu

Access Entries

Access entries are the define the operations of the access control panel. They are access definitions for the doors or locations controlled by that panel during a time zone. They define when an access panel will or will not allow access. When a token that has been granted an access entry and the conditions of that access entry are met, the token will be allowed through the panel.

Note: "Access Entry" is a generic term used by Intelli–Site Lite to encompass all access control panels' access definitions. There is no industry standard naming convention. Each panel will call an access entry by a different name. For example, an access entry is "Access Level" to Compass panels. Refer to the appropriate Panel Guide for the specific nomenclature.

Access entries are created and managed in the Access Entries Management Area of the ***Access Sets*** tab.

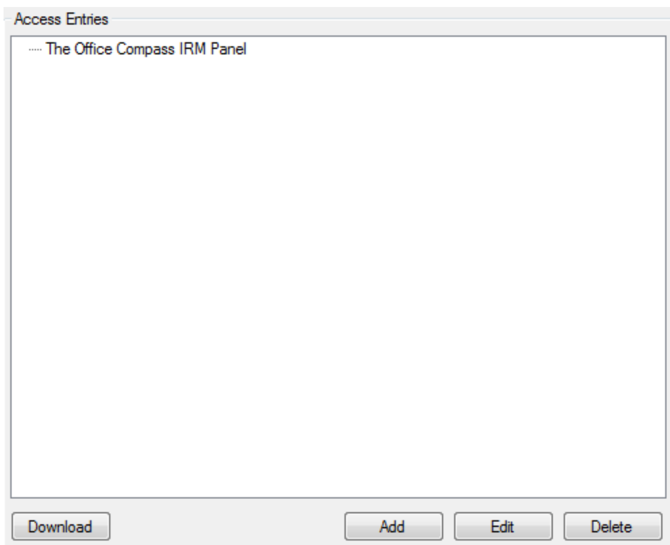
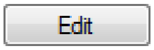


Figure 35 - Access Entries Management Area

Access Entries – List box displaying the access entries tree; depending on the type of access control panel, each access control panel in the Project is listed, or each group is listed and can be expanded to reveal the defined access entries

- Add an access entry to the selected *access control panel*; opens the properties dialog for the new access entry

Note: The properties dialog for the access entry is different for each access control panel. See the appropriate Panel Guide for exact details.



- Edit the selected access entry; opens the properties dialog for the selected access entry

- Delete the selected access entry; opens a **Confirm Delete** dialog

- Download all access entries to the field devices; becomes 

when changes to the access entries need to be downloaded to at least one field device; will remain this way until the changes have successfully downloaded to all the necessary field devices

Access Sets

Access Sets are groups of access entries. It is access sets that are assigned to personnel.

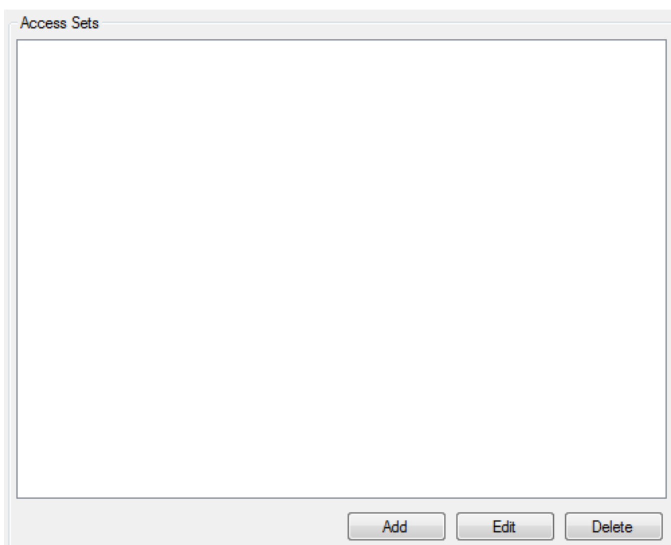
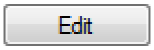


Figure 36 - Access Sets Management Area

Access Sets – List box displaying the access sets tree

- Add an access set; opens the properties dialog for the new access set



- Edit the selected access set; opens the properties dialog for the selected access set

- Delete the selected access entry; opens a **Confirm Delete** dialog

Access Set Data Dialog

The **Access Set Data** dialog is opened when an Access Set is added or edited.

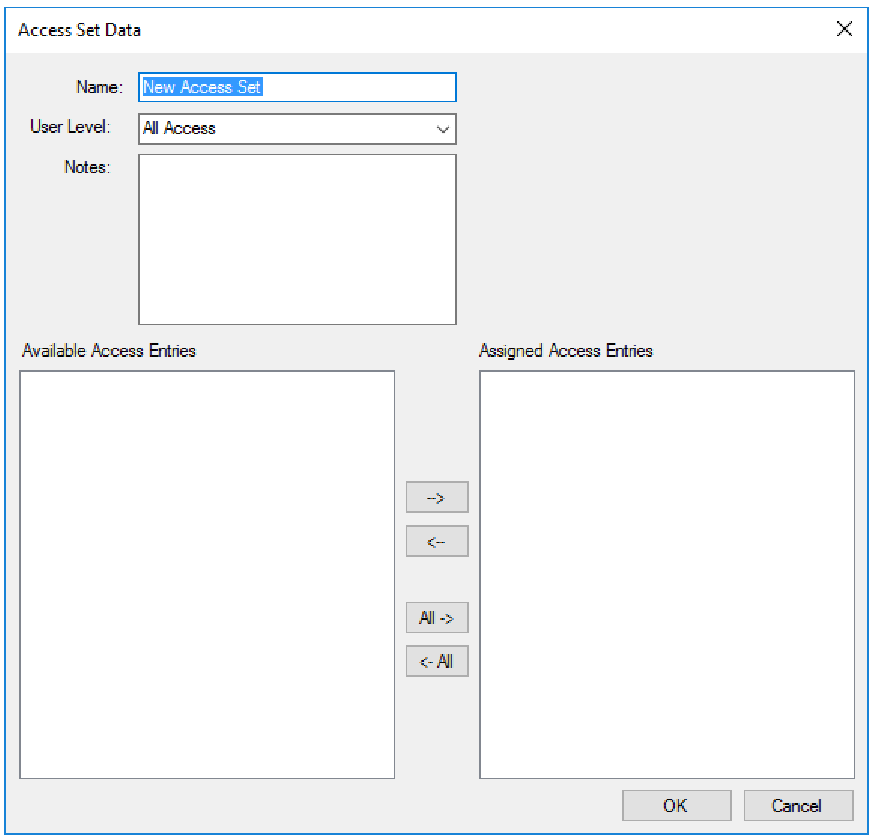


Figure 37 - Access Set Data dialog

Name – The name of the access set

User Level – The user level required to see this access set

Notes – Any notes about this access set

Available Access Entries – The access entries that have been defined but not included in this access set

Assigned Access Entries – The access entries that are included in this access set; when this access set is assigned to a card, that cardholder will be granted each of these access entries

Access entries are moved between the **Available Access Entries** list to the **Assigned Access Entries** list using the buttons between them.

Reporting a Lost Card

Cards are periodically lost. It is vital to quickly deactivate the lost card, issue the person a new card with the same access rights as the lost one, and download these changes to the panels. Use the  button on the token table for this.

Open **Access Management View**. Locate the personnel who lost the card. Highlight the personnel record. Then highlight the card that was reported as lost. Click the  button next to the token table. The **Replacement Card Information** dialog displays.

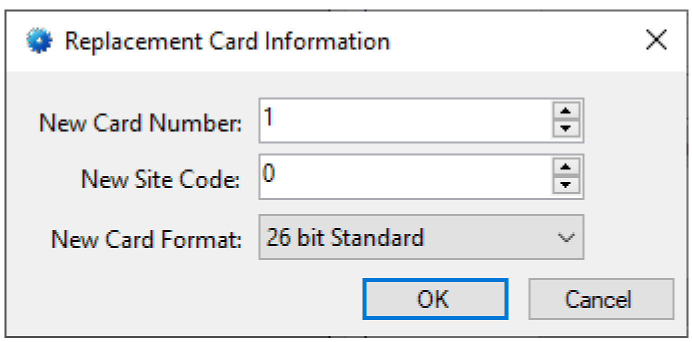
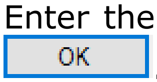


Figure 38 – Replacement Card Information Dialog

Enter the replacement token information in the dialog, and click . The **Card Status** of the selected card is set to *Lost* and the **Expired Date** is set to yesterday. It will still be assigned to this person. A new card is added with designated card number, site code, and format. The access rights of the original card are assigned to the new card. Both cards will be immediately downloaded.

The lost card will no longer have access to any readers. The new one will function for the person exactly as the lost card did. If the lost card is ever used it will trigger an event like any other invalid card read. The **Card No.** column in the alarm queue will show the personnel name if there is one.

***Note:** Intelli–Site marks this card as permanently lost and remembers to whom it was assigned. If the card is found, it must be deleted from the personnel record and added as if it is a new card even if it is to be assigned to the same person with the same access rights.*

Assigning a Temporary Card

There will be times when a temporary card is needed. For example, an employee left their badge on their kitchen counter next to their forgotten cup of coffee. This employee needs a new card for the day only. The Temp button of the token table streamlines this process.

***Note:** Temporary and Visitor are two separate concepts. Temporary is the status of a specific card whereas Visitor is a category of card types.*

Open **Access Management View**. Locate the person who needs a temporary card. Highlight their personnel record. Then highlight the card that must be temporarily replaced. Click the Temp button next to the token table. The **Replacement Card Information** dialog displays.

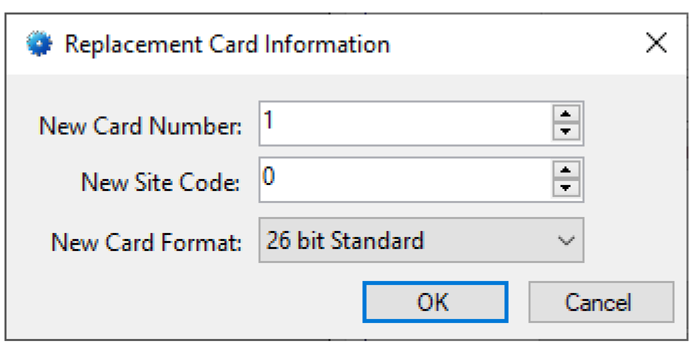


Figure 39 – Replacement Card Information Dialog

Enter the replacement token information in the dialog, and click OK. The **Card Status** of the selected card is set to *Forgot*. It will still be assigned to this person, but its **Expired** date is today. A new card is added with identical settings to the original card. The **Card Status** is *Temp* and it is active for today only. The new card's **Activate** date is today and the **Expire** date is tomorrow. Both cards will be immediately downloaded. Hand the new card to the person with a stern warning or at the very least a sigh of resigned exasperation.

When the card is returned, locate the card in the token table. Highlight it. Temp becomes Return. Click it. The temporary card is deleted, and the forgotten card is re-activated and downloaded to the panels. The temporary card will no longer have access to any panels.

Assigning a QR Code

Consider an elementary school. There are often visitors on site and they may need access to an area or room whose access is controlled such as the copy room. These visitors don't need a permanent badge. Wouldn't it be great to give them a temporary badge they can throw away when they leave? This is just one example where printing a QR Code badge would fit the bill.

Note: The Intelli–Site license must contain the QR Code module to activate this feature. In addition, Intelli–Site must be in Multi-ID, the default mode. This feature is not available in Single-ID mode.

Open **Access Management View**.

If the person needing a QR code badge is not in the personnel table, click the Add button below the personnel Card Data tab. Enter this person's information in the **Cardholder Data** fields. Leave the **Card Data** fields alone. Click Save. A **Card number is 0** dialog displays to inform you a new personnel record has been added without a card.

Locate the person who needs a QR code badge in the personnel table. Highlight their personnel record. Click the QR Code button next to the token table. The **Add QR Code Active Date Range** dialog displays.

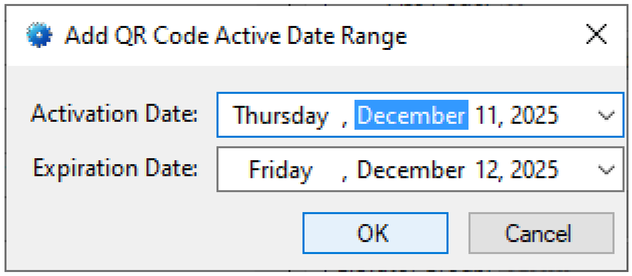
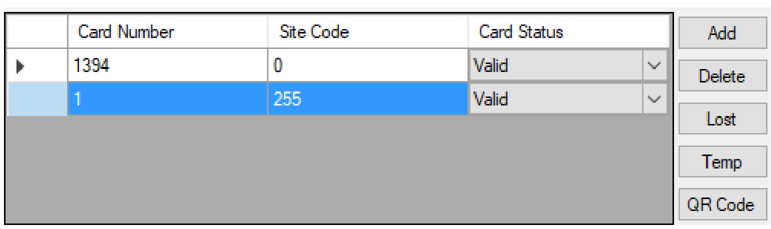


Figure 40 - Add QR Code Active Date Range dialog

Set the **Activation Date** and the **Expiration Date** for this temporary QR Code card. Since this card is temporary by nature, the date range cannot exceed 5 days. Then click OK. Intelli–Site generates a QR Code using the next available number and a site code of 255. The QR Code is saved as a PNG file in your Documents folder. A dialog pops up indicating the fully qualified name of this file.

The QR Code token is added to the highlighted personnel's token table. Now assign access to it as you would any other token.



	Card Number	Site Code	Card Status
▸	1394	0	Valid
	1	255	Valid

Figure 41 - Token Table after adding a QR Code token

The QR Code can now be used like any other token. The person just needs to present it to the reader. Of course, the reader must be able to read the QR Code.

Activity View

The **Activity View** allows the user to monitor system activity, specifically:

- Valid Card Reads
- Invalid Card Reads
- I/O Activity
- Virtual Panels

This is the **Activity View** window.

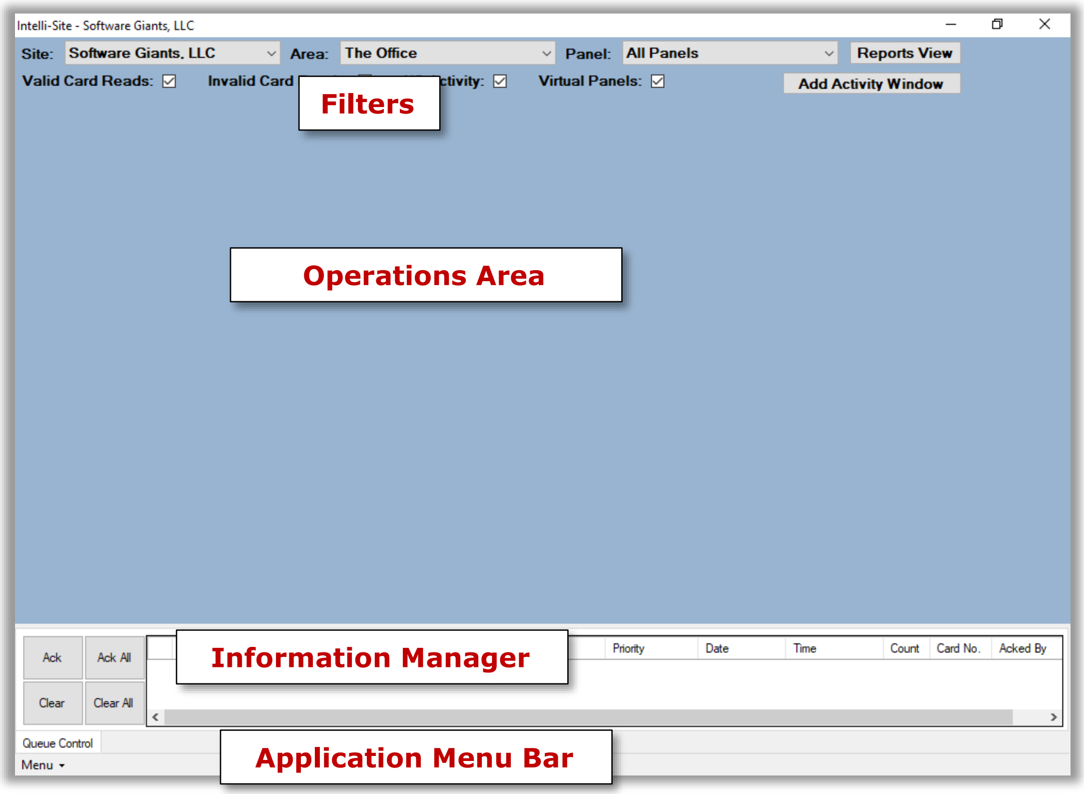


Figure 42 - The Activity View

Filters – Drop-down lists and checkboxes used to filter the activity data that will appear in the Activity Window when it is added

Add Activity Window – button; Add an Activity Window to the Operations Area displaying the activity data specified by the filters; the header for the activity window displays the filters used to create it

Reports View - button; Switch directly to the **Reports View**

Operations Area – Displays Activity Windows; An Activity Window's size adjusts to fit as windows are added

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

Application Menu Bar – Contains the Application Menu and the status of the license and SMA; see The Application Menu

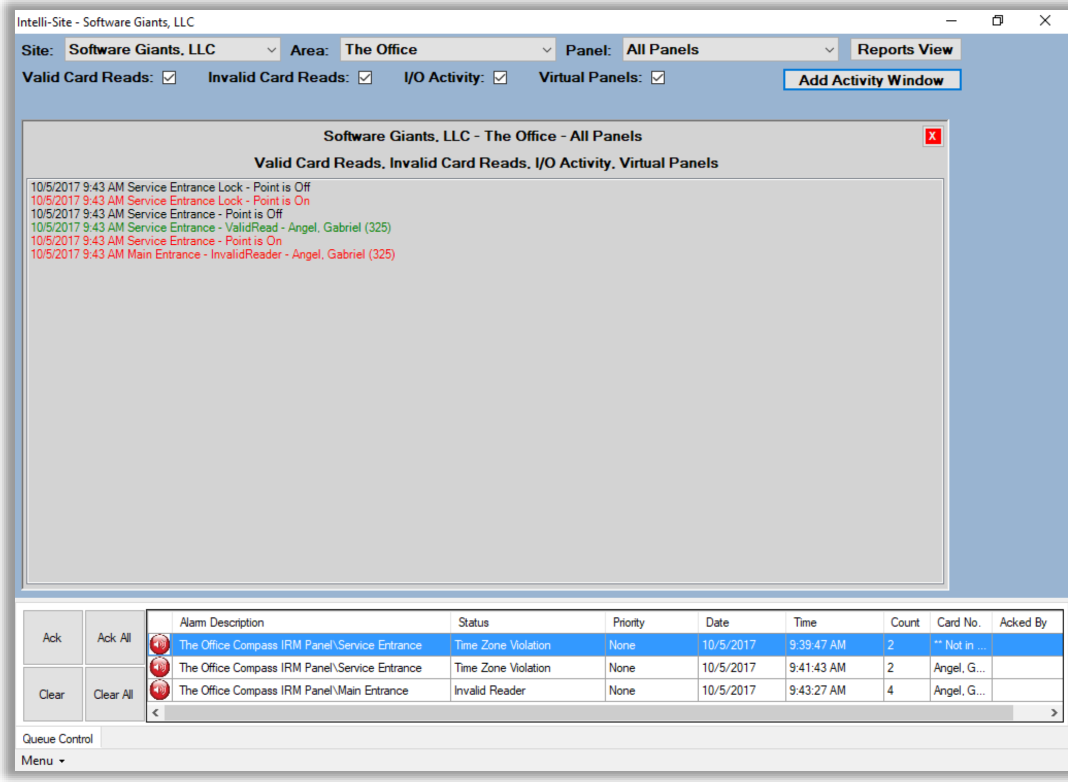


Figure 43 - Sample Activity Window

Design View

Design View is the most powerful View in the system. Here is where all the screens for **Live View** are created and managed. The badges and Card Data Screens are designed here. Here resides all the programming that the Engine requires to monitor and control the integrated system. This is the home of the **Project Node Tree**. In fact, the purpose of many of the other Views is to provide a simple interface for specific programming processes for the **Project Node Tree**.

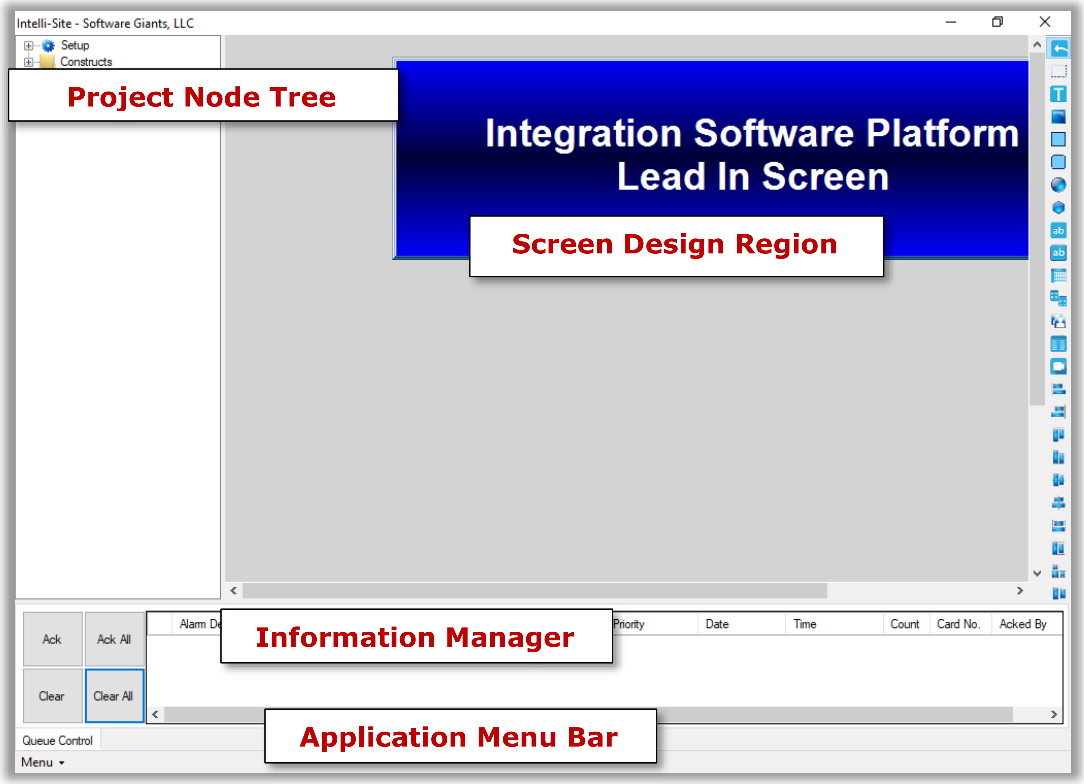


Figure 44 - Design View

Project Node Tree –The heart of the Intelli–Site Lite system; for details see section The Project Node Tree

Screen Design Region – Region in which screens are created and modified; see Screen Control

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

Application Menu Bar – Contains the Application Menu and the status of the license and SMA; see The Application Menu

Figure 91 - Screen Object located in Project Node Tree after F11

Preview of Images and Sounds

Deciding on which image or sound to use can be tricky. Intelli–Site Lite gives you a quick way to preview images and sounds.

Locate the image or sound in the Project Node Tree. Place the mouse cursor over the node. Hold down the mouse button. A preview image will show for an image node. The sound will play for a sound node.

Try it! It's fun.

Documentation View

The Intelli–Site Lite manuals, including Panel Guides, can be read within Intelli–Site Lite using the **Documentation View**. In addition, documents provided by the integrator can be read in this View. To learn how to add documents, see section Documentation

This is the **Documentation View** window.

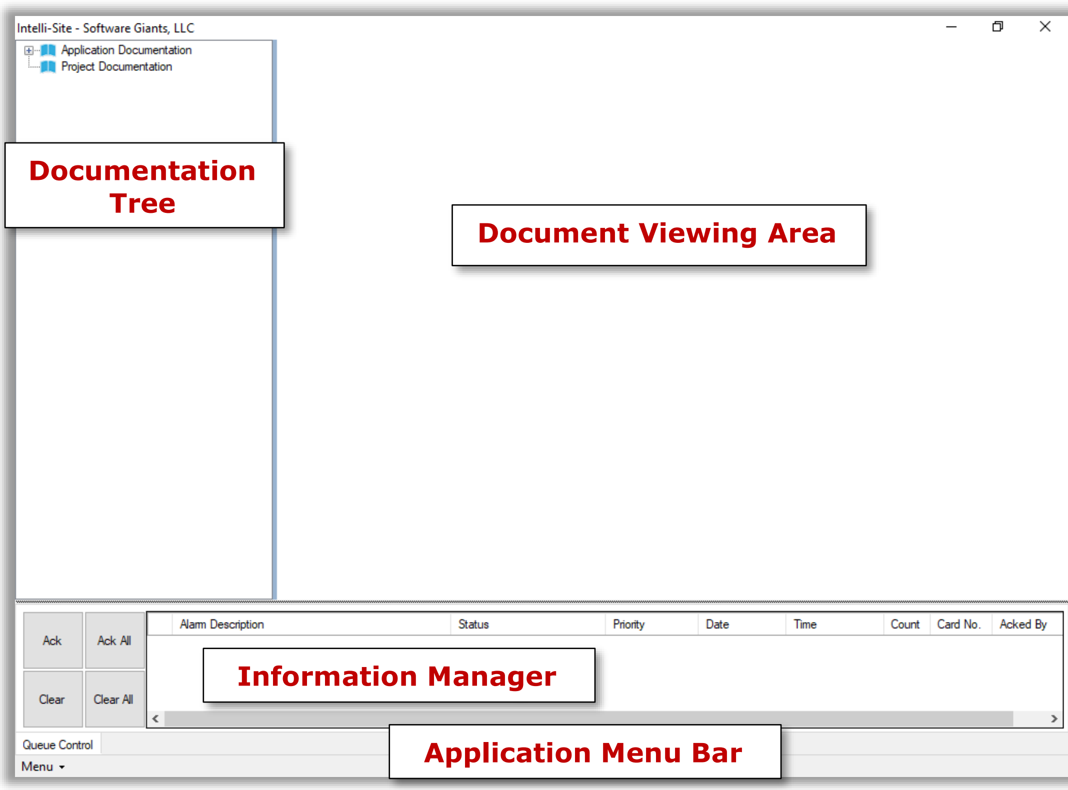


Figure 164 - The Documentation View

Documentation Tree – Used to navigate to the desired document or manual; divided into two folders:

Application Documentation – The documents pertaining to Intelli–Site Lite; includes the Intelli–Site Lite User's Guide and the Panel Guides for the installed drivers

Project Documentation – The documents specific to the project created by the integrator; the integrator is strongly encouraged to provide a user's manual for the project.

Document Viewing Area – Displays the selected document

Note: All Intelli–Site Lite manuals are PDF files. Therefore, a PDF reader must be installed on the computer on which the manuals are to be viewed. If there is not a PDF reader on the computer, an "error loading webpage" message displays in the Document Viewing Area.

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

Application Menu Bar – Contains the Application Menu and the status of the license and SMA; see The Application Menu

Hardware Management View

Hardware is managed and monitored in the **Hardware Management View**. This section explains managing and monitoring:

- Hardware Organization (Sites and Areas)
- Drivers
- Panels

This is the **Hardware Management View** window.

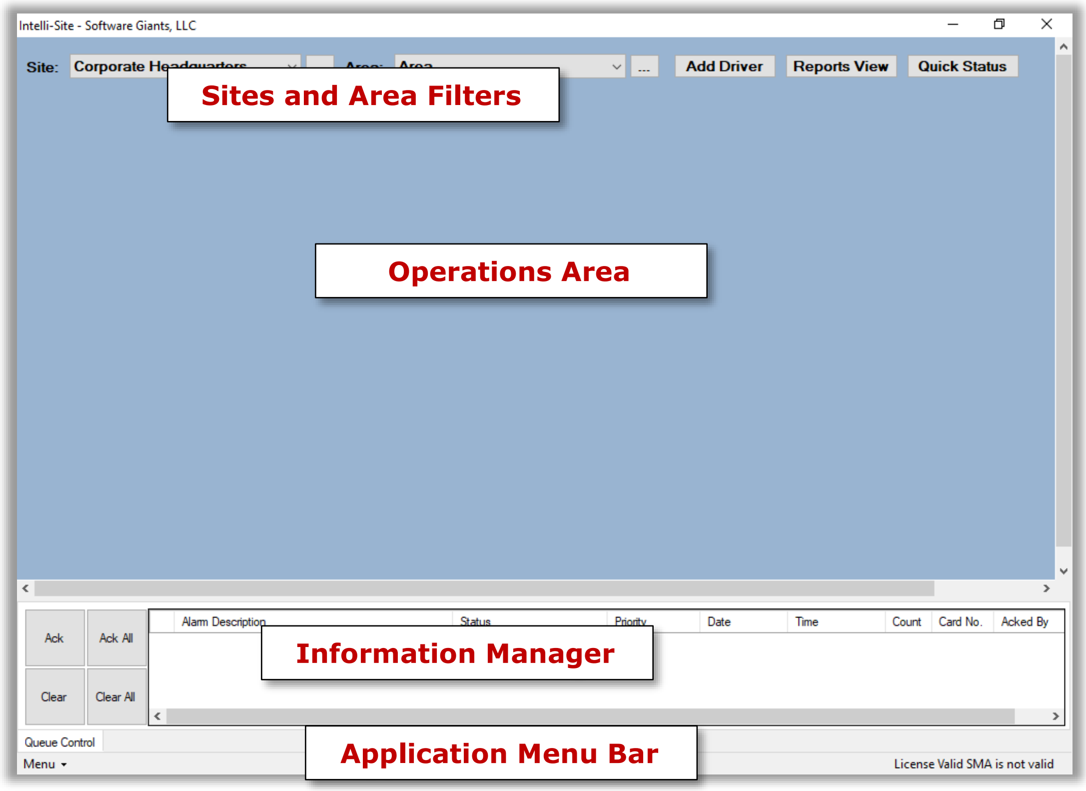


Figure 165 - The Hardware Management View

Site and Area Filters – Drop-down lists used to filter the Operations Area

Add Driver – button; Add a Driver to the Project; it will display in the Operations area. A panel cannot be added until a corresponding Driver has been added.

Reports View - button; Switch directly to the **Reports View**

Quick Status - button; Opens a tree list box to manage the Drivers and Panels as a list versus graphical view; allows faster enabling or disabling of multiple Drivers and panels.

Operations Area – Displays the Drivers and panels filtered by the selected Site and Area; Drivers that have no panels in their **Panel List** will appear in all Sites and Areas

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

Application Menu Bar – Contains the Application Menu and the status of the license and SMA; see The Application Menu

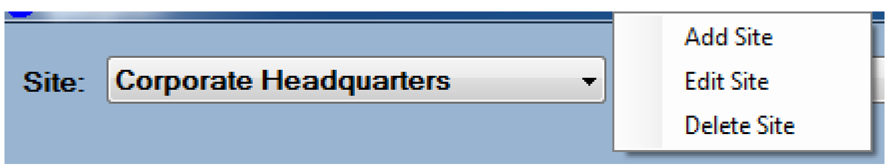
Site and Area Filters

The Site and Area filters consist of a **Site** drop-down list and its ellipsis button and an **Area** drop-down list and its ellipsis button. The ellipsis button is used to manage the drop-down list to its immediate left.

Note: Sites and Areas are nodes under the System Layout node in the Project Node Tree. See System Layout

Site - Drop-down list containing the list of available sites including the ***All Sites*** option

Site ellipsis button – Opens the menu to manage the Sites in the project



Add Site – Add a Site to the Project and open the new site's properties dialog; see Site

Edit Site – Open the properties dialog for the selected site, the site displayed in the **Site** menu

Delete Site – Delete the selected site, the site displayed in the **Site** menu

Area - Drop-down list containing the list of available areas in the selected Site including the ***All Areas*** option

Area ellipsis button – Opens the menu to manage the Areas in the project; the menu contains:

Add Area – Add an Area to the selected site and open the new area's properties dialog; see Site

Edit Area – Open the properties dialog for the selected area, the area displayed in the **Area** menu

Delete Area – Delete the selected area, the area displayed in the **Site** menu

The Add Driver Button and Adding Panels

The **Add Driver** button is used to add a driver to the Project. If only one driver type was selected during the Intelli–Site Lite installation process, clicking this button will immediately add a driver for this driver. If more than one driver type was selected during installation, a **Choose Driver Type** dialog is opened.

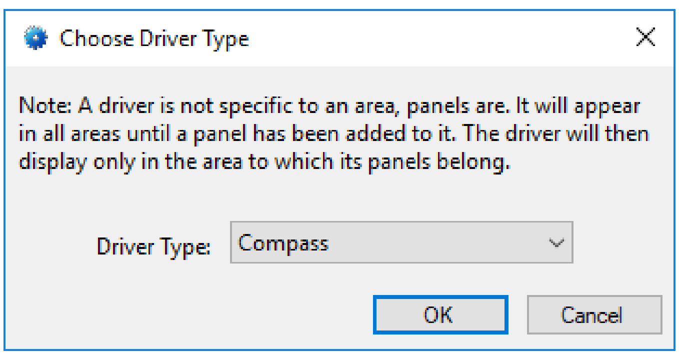


Figure 166 - Choose Driver Type dialog

A new driver icon is added to the Operations Area and the properties dialog for the driver is opened.

Note: An alert icon appears on a new driver until a communication method has been defined for it.

Once a driver is added, a panel can be added to it. A Site and Area must be specified because a panel is a child node of an Area in the Project Node Tree. A panel is added using the Driver Context Menu.

The Driver Context Menu

The Driver Context Menu is opened by right-clicking on the driver icon.

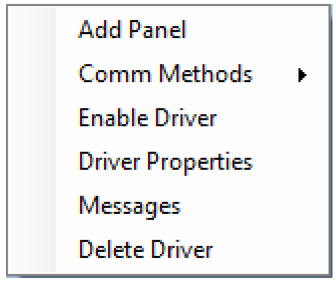


Figure 167 - Driver panel Context Menu

Add Panel – Opens the **Add Panel** dialog, select the desired panel and enter the number to add. This **Add Panel** dialog only displays the possible panels for the target driver.

Comm Methods – A side menu to add and manage communication methods for this driver; communication methods are child nodes of the driver node in the Project Node Tree

Note: Not all drivers require a communication method. An icon appears on a new driver that requires a communication method until one has been defined for it. See the respective panel guide for details.

Enable Driver – Enable/Disable this driver; if the driver is enabled, the menu option is ***Disable Driver***

Driver Properties – Open the properties dialog for this driver; the properties dialog is specific to each type of driver, see the appropriate Panel Guide for details

Messages – Open the **Messages** window

Delete Driver – Permanently remove this driver from the Project

The Panel Context Menu

The Panel Context Menu is opened by right-clicking on the panel icon.

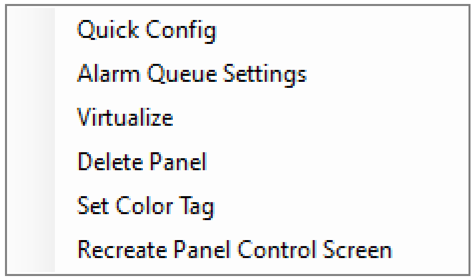


Figure 168 - Panel Context Menu

Quick Config – Open the **Quick Config** dialog for this panel. The **Quick Config** dialog provides a centralized method to program and configure a panel's properties. These properties may exist on multiple nodes in the Project Node Tree. This dialog is different for each panel type; consult the Panel Guide for more information.

Note: An icon appears on a panel whenever the Engine detects a download is needed for said panel. The Quick Config dialog contains buttons to download any and all settings, holidays, time zones, etc. that may be required by a panel. The button for the required download will be salmon-colored instead of grey. But of course, the driver and panel must be online for a download to complete.

Alarm Queue Settings – Open the **Alarm Queue Settings** dialog for this panel. Alarm Queue Settings determine which points on this panel can generate events for the Alarm Queue, when the events are generated and how the events are to be handled. The points can exist on multiple nodes in the Project Node Tree. The **Alarm Queue Settings** dialog provides a centralized location for setting these properties. See Replace All… I/O Point Settings.

Virtualize – Put this panel in Virtual mode; when a panel is "virtualized", the Engine will not attempt to communicate with actual panel but will pretend the panel is there. It will appear to be online and some basic functionality may appear to work. This allows the integrator to program the project and perform basic programming without actually having the hardware in place. When the panel is in Virtual mode, this option becomes ***Unvirtualize***.

Delete Panel – Permanently remove this node and all references to it from the Project

Set Color Tag – Allows the user to set the color of a small light on the panel icon. Selecting this option opens the **Color** dialog. This allows the user to color-code each panel as fits their requirements.

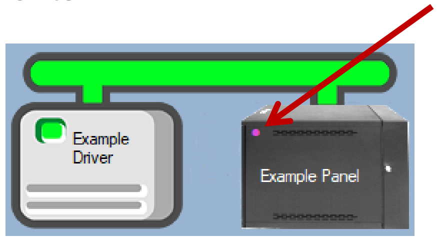


Figure 169 - Color Tag on Panel Icon

Recreate Panel Control Screen *– Deletes and recreates the Panel Control Screen that is opened when you click on the panel icon.*

The Quick Status Button

The Quick Status button is used to manage the drivers and panels as a tree list instead of a graphical view. This allows faster enabling or disabling of multiple drivers and panels, which is extremely useful at larger facilities. Clicking this button opens the **Quick Change Driver/Panel Status** dialog.

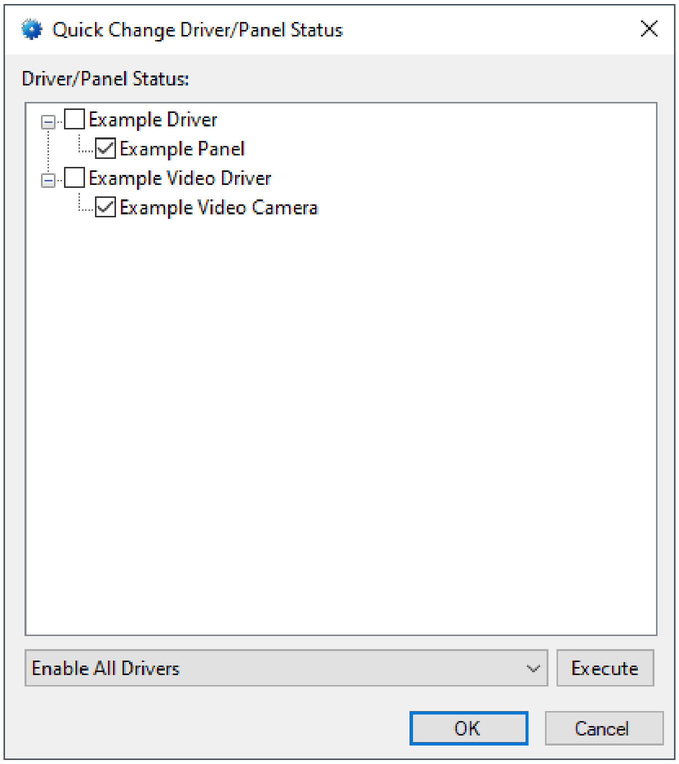


Figure 170 – Example Quick Change Driver/Panel Status

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.

Operations Area

The Operations Area is used to monitor the state of drivers and panels in the Project. The drivers and panels that are displayed are filtered by the **Site** and **Area** drop-down lists.

Right-clicking on the Operations Area opens the Operations Area Context Menu which allows you to adjust the size of the icons.

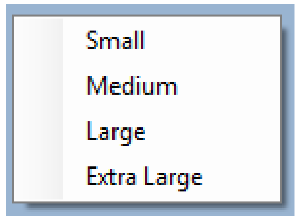


Figure 171 - Operations Area Context Menu

Monitoring Drivers

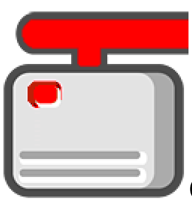
Once a driver has been properly configured, **Hardware Management View** allows the user to manage and monitor its state. The user may also monitor the communication between the driver, the Engine, and the field device.

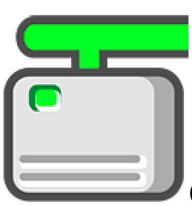
Driver States

Using the driver's context menu, a driver can be enabled or disabled. The icon for the driver will change color to indicate the current state of the driver.

A driver has three states:

**Disabled** – The driver is disabled

**Offline** – The driver is enabled but offline

**Online** – The driver is enabled and online

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Note: An icon appears on a new driver until a communication method has been defined for it.

Driver Messages Window

The **Driver Messages** window allows the user to see the communication messages between the driver, the Engine, and the field device in real time. The Driver Messages window for a driver is opened using the *Messages* option of the context menu for the target driver.

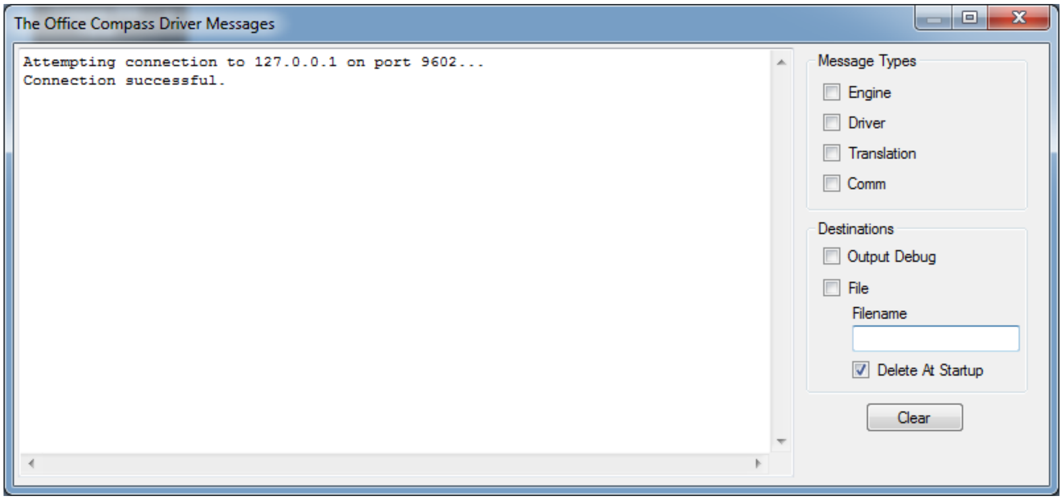


Figure 172 - Messages Window

The **Message Types** group of checkboxes controls which messages that are displayed and how they are displayed.

Engine – Display all messages to and from the Engine

Driver – Display all messages to and from the Driver

Translation – Display the messages in human readable format

Comm – Display the messages in their native format (hex)

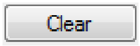
The **Destinations** group allows the user to send the messages to another destination when the Driver Messages window is open.

Output Debug – Send the messages to output debug

File – Send the messages to the file specified in

Filename – The destination file

Delete At Startup – When checked, the file will be deleted; when clear, the file will be appended to



- Clear the messages window (does not clear the file)

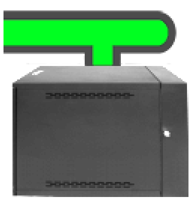
Monitoring and Managing Panels

Once a panel has been properly configured and its driver enabled, **Hardware Management View** allows the user to manage and monitor its state. The user may also monitor and manage the panel using its panel control screen.

Panel States

When a driver is online, the panel has three states:


Offline – The driver is enabled, but the panel is offline


Online – The driver is enabled, and the panel is online


Virtual – If the driver is enabled, the panel is *Virtual*; if the driver is disabled, the state of the panel is indeterminate.

Note: An icon appears on a panel whenever the Engine detects a downloaded is needed for said panel. The Configure Panel dialog contains buttons to download any and all settings, holidays, time zones, etc. that may be required by a panel. But of course, the driver and panel must be online for a download to complete.

Panel Control Screen

The Panel Control Screen allows the user to monitor and manage the panel. It is opened by clicking on the panel icon. The Panel Control Screen is specific to the type of panel. For information on the specific Panel Control Screen, consult the specific Panel Guide.

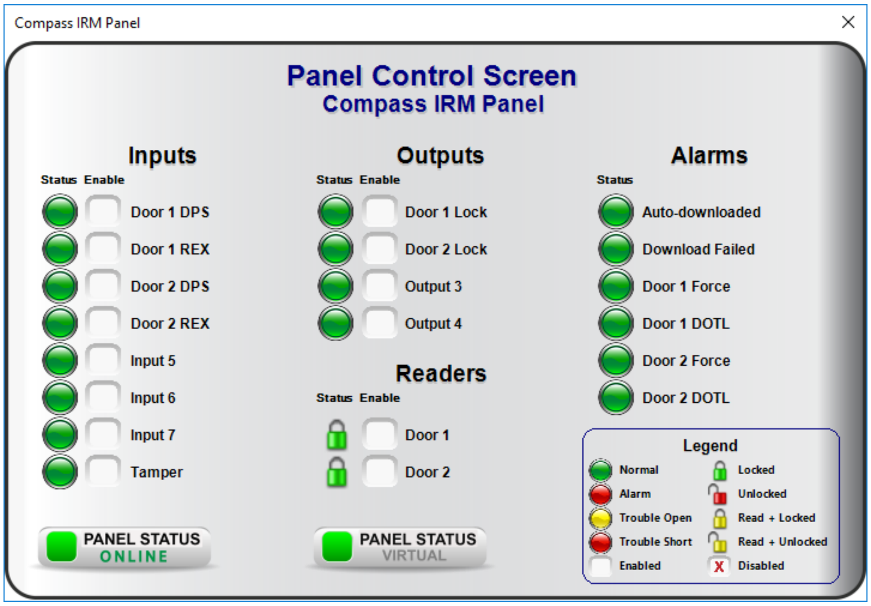


Figure 173 - Compass IRM Panel Control Screen

Live View

Live View is the main working view for Project monitoring and control. Project programming and screen design used in this View is handled in **Design View**. See Screen Control.

This is the default **Live View** window. Of course, the final look and feel of this View depends on the screens created in **Design View**.

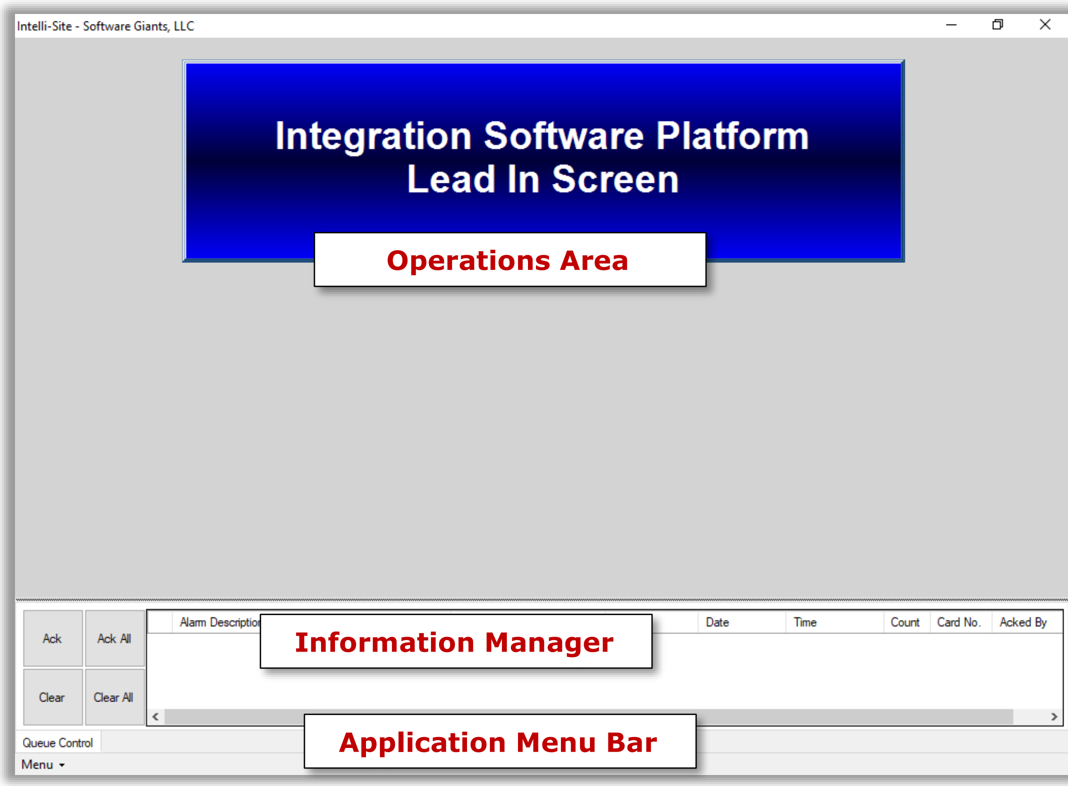


Figure 174 - The Live View

Operations Area – Displays the screen the user selected; screens are created and managed in **Design View**

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

Application Menu Bar – Contains the Application Menu and the status of the license and SMA; see The Application Menu

Reports View

The Intelli–Site Lite provides several reports on card activity and system information in **Reports View**. Intelli–Site Lite uses the Microsoft® SQL Server® 2012 Report Viewer to display reports. The Microsoft® SQL Server® 2012 Report Builder is required to create the RDL files that are used by Report Viewer. The integrator and user can create their own custom reports. For information on creating and including custom reports, see Reports

Generating a report is simple. Navigate to the report in the Reports Tree and double-click on the node. Some reports require the user to enter parameters, others don't. A **Reports Parameters** dialog appears allowing the user to specify them if necessary. Values may be entered explicitly, or "wildcard" search parameters may be used. All reports are displayed to the screen and can be printed or exported.

This is the **Reports View** window.

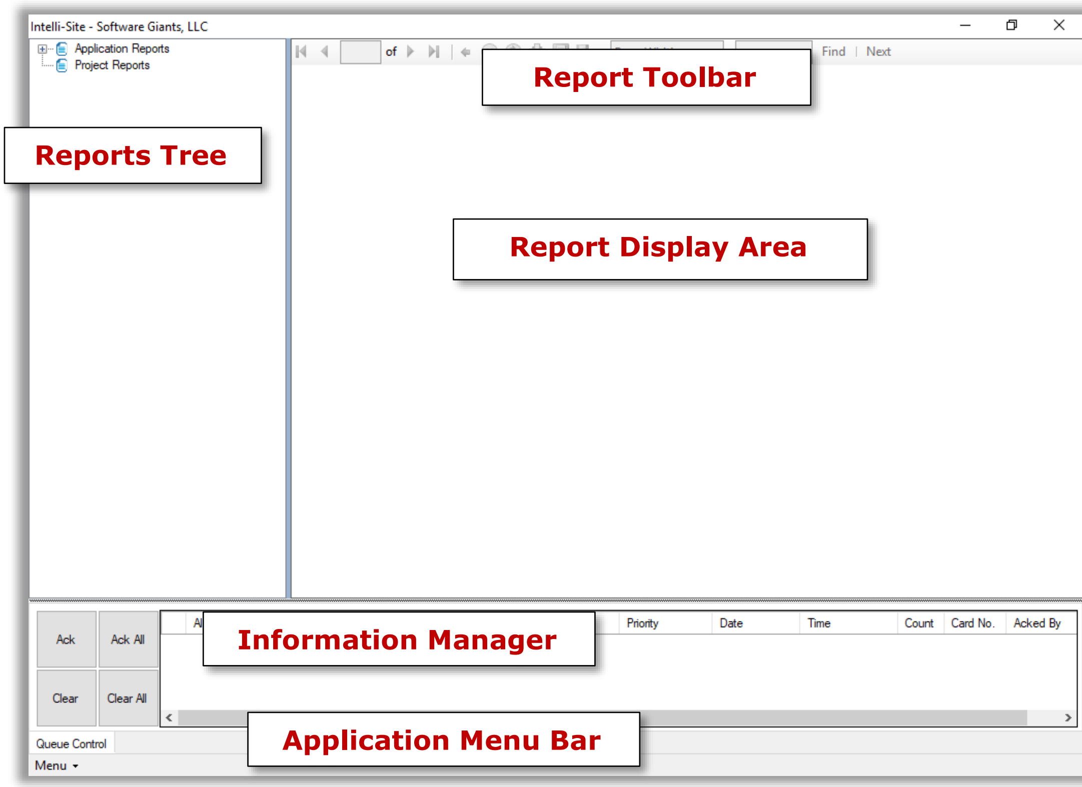


Figure 175 - The Reports View

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; see The Information Manager

Application Menu Bar – Contains the Application Menu and the status of the license and SMA; see The Application Menu

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. See Reports.

The **Cards** node and the **System** node are revealed when the **Application Reports** node is expanded. Cards reports are useful for Card Management, and System reports are useful for providing information on event history, statistics, and detailed system information.

Listed under the **Cards** node are sixteen (16) predefined reports. Listed under the **System** node is, at a minimum, the All History Report, Cardholder Activity Report, Custom History Report, Download Report, Exceptions Report, Guard Tour Report, I/O Activity Report, Operator Report, Project Changes Report and the System Information Report. Under the Master History Report node are the Asset Event Report and Asset Setup Report.

Report Parameters Dialog

Many of the reports have parameters or filtering options that the user may specify. If the report being generated has any parameters, the **Report Parameters** dialog will display.

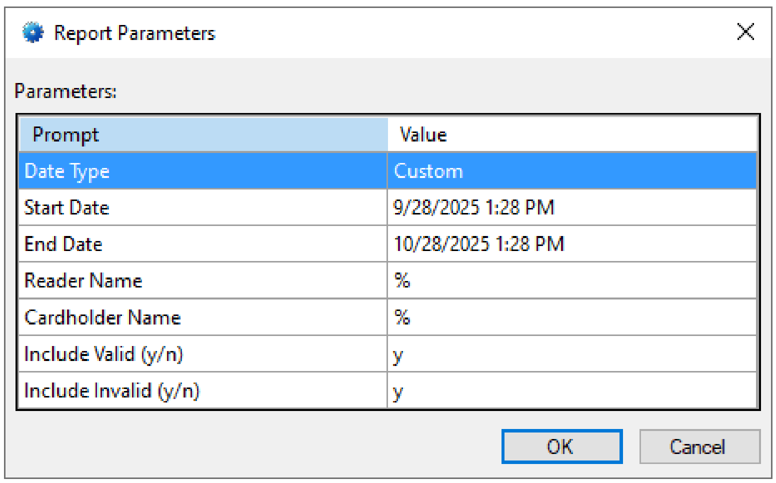


Figure 176 - Report Parameters Dialog

The **Prompt** column contains the prompts for each of the filters for the report.

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* prompts are either y or n.

In the string value 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.

Accutech Reports

These reports are explained in **Accutech View** Reports.

Cards Reports

The following sections describe the purpose and use of each of the cards reports.

Access Assignment Log Report

The Zone Assignment Log, **Zone Assignment Log.rdl**, lists the changes in zone assignments which receivers are included in which zone. When the report is double-clicked, the user is presented with the **Reports Parameter** dialog. The parameters for this report are:

- Date Type
- Start Date
- End Date
- Operator Name
- Computer Name
- Change Type (Assigned, Removed, *)
- Name
- Card Number

Every access set assignment modification matching the supplied information will be included in the report. The report is sorted by date and time.

Access Entry by Access Set Report

The Access Entry by Access Set Report, **Access Entry by Access Set.rdl**, lists which access entries are in which access set. When the report is double-clicked, the user is presented with the **Reports Parameter** dialog. The user may specify a specific access set name, part of an access set name, or '%' for all access sets.

The report columns are **Access Set** and **Access Entry**; it is sorted by Access Set.

Access Entry by Cardholder Report

The Access Entry by Cardholder Report, **Access Entry by Cardholder.rdl**, lists the access entries a cardholder has been assigned. When the report is double-clicked, the user is presented with the **Reports Parameter** dialog. The user may specify a full card number, part of a card number, part or all of the last name of a card holder, or '%' for all cardholders. All cards matching the information supplied will be included in the report.

The report columns are **Name**, **Card #**, **Site Code**, **Card Format**, **Activate Date**, **Expire Date**, and **Access Entry**. The Name contains the first name and last name of the cardholder. The report is sorted by card number.

Access Entry by Reader Report

The Access Entry by Reader Report, **Access Entry by Reader.rdl**, lists the access entries that include the specified reader. When the report is double-clicked, the user is presented with the **Reports Parameter** dialog. The user may specify a full or part of a reader name or '%' for all readers. All readers matching the supplied information will be included in the report.

The report columns are **Reader Name** and **Access Entry**. The report is sorted by **Reader Name**.

Access Set by Access Entry Report

The Access Set by Access Entry Report, **Access Set by Access Entry.rdl**, lists which access entries are included in which access set. When the report is double-clicked, the user is presented with the **Reports Parameter** dialog. The user may specify a specific part or all an access entry name or '%' for all access entries.

The report columns are **Access Entry** and **Access Set**; it is sorted by **Access Entry**.

Access Set by Cardholder Report

The Access Set by Cardholder Report, **Access Set by Cardholder.rdl**, lists the access sets a cardholder has been assigned. When the report is double-clicked, the user is presented with the **Reports Parameter** dialog. The user may specify a full card number, part of a card number, all or part of a last name, or '%' for all cardholders. All cards matching the information supplied will be included in the report.

The report columns are **Name**, **Card #**, **Site Code**, **Card Format**, **Activate Date**, **Expire Date**, and **Access Set**. The **Name** contains the first name and last name of the cardholder. The report is sorted by card number.

Access Set by Reader Report

The Access Set by Reader Report, **Access Set by Reader.rdl**, lists the access sets that include the specified reader. When the report is double-clicked, the user is presented with the **Reports Parameter** dialog. The user may specify all or part of a reader name, or '%' for all readers. All readers matching the supplied information will be included in the report.

The report columns are **Reader Name** and **Access Set**. The report is sorted by **Reader Name**.

Cardholder by Access Entry Report

The Cardholder by Access Entry Report, **Cardholder by Access Entry.rdl**, lists which cardholders have been assigned which access entries. When the report is double-clicked, the user is presented with the **Reports Parameter** dialog. The user may specify an access entry, part of an access entry, or '%' for all access entries. All access entries matching the supplied information will be included in the report.

The report columns are **Access Entry**, **Name**, **Card #**, **Site Code**, **Card Format**, **Activate Date**, and **Expire Date**. The **Name** contains the first name and last name of the cardholder. The report is sorted by **Access Entry**.

Cardholder by Access Set Report

The Cardholder by Access Set Report, **Cardholder by Access Set.rdl**, lists which cardholders have been assigned which access sets. When the report is double-clicked, the user is presented with the **Reports Parameter** dialog. The user may specify an access set name, part of an access set name, or '%' for all access sets. All access sets matching the supplied information will be included in the report.

The report columns are **Access Set**, **Name**, **Card #**, **Site Code**, **Card Format**, **Activate Date**, and **Expire Date**. The **Name** contains the first name and last name of the cardholder. The report is sorted by **Access Set**.

Cardholder by Reader Report

The Cardholder by Reader Report, **Cardholder by Reader.rdl**, lists which cardholders have been assigned access to which readers. When the report is double-clicked, the user is presented with the **Reports Parameter** dialog. The user may specify all or part of a reader name or '%' for all readers. All readers matching the supplied information will be included in the report.

The report columns are **Reader**, **Name**, **Card #**, **Site Code**, **Card Format**, **Activate Date**, and **Expire Date**. **Name** contains the first name and last name of the cardholder. The report is sorted by **Reader**.

Cardholder by Zone Report

The Cardholder by Zone Report, **Cardholder by Zone.rdl**, lists which cardholders are in which Anti-passback (APB) Zone. When the report is double-clicked, the user is presented with the **Reports Parameter** dialog. The user may specify all or part of an APB Zone name or '%' for all APB Zones. All zones matching the supplied information will be included in the report.

The report columns are **Zone** and **Name** where Name is Last Name, First Name.

Company Card Report

The Company Card Report, **Company Card Report.rdl**, lists cardholders and their cards grouped by the **Company** field on the ***Card Data*** tab. There are no parameters for this report.

The report columns are **Company**, **Name**, **Card #**, **Site Code**, **Card Format**, **Activate Date**, and **Expire Date**. **Name** contains the first name and last name of the cardholder. The report is sorted by **Company**.

Department Card Report

The Department Card Report, **Department Card Report.rdl**, lists cardholders and their cards grouped by the **Department** field on the ***Card Data*** tab. There are no parameters for this report.

The report columns are **Department**, **Name**, **Card #**, **Site Code**, **Card Format**, **Activate Date**, and **Expire Date**. **Name** contains the first name and last name of the cardholder. The report is sorted by **Department**.

Master Card Report

The Master Card Report, **Master Card Report.rdl**, lists cardholders and their cards grouped by the **Company** field on the ***Card Data*** tab. There are no parameters for this report.

Each entry of the report takes three (3) lines. Line one contains **Name**, **Card #**, **Site Code**, **Card Format**, **Activate Date**, and **Expire Date**. The **Name** contains the first name and last name of the cardholder. Line two contains **Date Created**, **Created by**, **Date Last Modified**, and **Modified by**. Line three contains **Last Read (date and time)** and **Last Reader**. **Name** is last name, first name. The report is sorted by **Name**.

Muster Report

The Muster Report, **Muster.rdl**, is a snapshot of the cardholders' presence during a Mustering Event. It will list all cardholders that are not in a Muster Zone but are in a Zone somewhere.

The report columns are **Zone** and **Name** where **Name** is Last Name, First Name.

Personnel Detail Report

The Personnel Detail Report, **Personnel Detail Report.rdl**, lists the personnel that meet the report parameters supplied.

The report parameters are:

- Department
- Last Name
- Company

Each entry of the report gives all the available personnel data including the photo if present.

Reader by Access Entry Report

The Reader by Access Entry Report, **Reader by Access Entry.rdl**, lists which readers are included in which access entry. When the report is double-clicked, the user is presented with the **Reports Parameter** dialog. The user may specify all or part of an access entry name or '%' for all access entries. All access entries matching the supplied information will be included in the report.

The report columns are **Access Entry** and **Reader**. It is sorted by **Access Entry**.

Reader by Access Set Report

The Reader by Access Set Report, **Reader by Access Set.rdl**, lists which readers are included in which access set. When the report is double-clicked, the user is presented with the **Reports Parameter** dialog. The user may specify all or part of an access set name or '%' for all access set. All access sets matching the supplied information will be included in the report.

The report columns are **Access Set** and **Reader**. It is sorted by **Access Set**.

Reader by Cardholder Report

The Reader by Cardholder Report, **Reader by Cardholder.rdl**, lists which cardholders have access to which readers. When the report is double-clicked, the user is presented with the **Reports Parameter** dialog. The user may specify all or part of a card number, all or part of a last name, or '%' for all card numbers. All cardholders matching the information supplied will be included in the report.

The report columns are **Name**, **Card #**, **Site Code**, **Card Format**, **Activate Date**, **Expire Date**, and **Reader**. **Name** is last name, first name. The report is sorted by **Name**.

RFID Reports

The following sections describe the purpose and use of each of the RFID reports.

Master Tag Report

The Master Tag Report, **Master Tag Report.rdl**, lists tags and their current status. There are no parameters for this report.

Each entry of the report takes 7 (7) lines. Line one contains Tag Name, Tag #, Owner and Notes. Line two contains Tag Type and Owner Tag #. Line three is Date Created, Created by, Date Last Modified, and Modified by. Line four contains Last Read (date and time) and Last Receiver. Line five is the Status header/separator. Line six is the names of the different RFID statuses: Missing, Moving, Over Time Limit, Unescorted, Escorted, Invalid Zone Low Battery, and Lost. Line seven will have 'X' under the status header if the tag is in said RFID state.

The report is sorted by Tag Number.

Receiver by Zone Report

The Receiver by Zone Report, **Receiver by Zone.rdl**, lists which receivers are included in which zone. When the report is double-clicked, the user is presented with the **Reports Parameter** dialog. The user may specify all or part of a zone name or '%' for all zones. Every zone matching the supplied information will be included in the report.

The report columns are **Zone** and **Receiver**. It is sorted by **Zone**.

Zone Assignment Log

The Zone Assignment Log, **Zone Assignment Log.rdl**, lists the changes in zone assignments which receivers are included in which zone. When the report is double-clicked, the user is presented with the **Reports Parameter** dialog. The parameters for this report are:

- Start Date
- End Date
- Operator Name
- Computer Name
- Change Type (Assigned, Removed, *)
- Tag Name
- Tag Number

Every modification made to a zone assignment that matches the supplied information will be included in the report. The report is sorted by date and time.

Zone by Receiver Report

The Zone by Receiver Report, **Zone by Receiver.rdl**, lists which zones are contain in which receivers. When the report is double-clicked, the user is presented with the **Reports Parameter** dialog. The user may specify all or part of a receiver name or '%' for all receivers. Every receiver matching the supplied information will be included in the report.

The report columns are **Receiver** and **Zone**. It is sorted by **Receiver**.

System Reports

The Intelli–Site Lite software logs activity or events within the system as well as Project changes in the database. The events it logs are:

- Card activity,
- I/O activity,
- Exceptions,
- Downloads,
- Client activity, and
- Alarms.

The Project changes logged are

- Node additions, modifications, and deletions
- Card additions, modifications, and deletions
- Personnel additions, modifications, and deletions
- Access Set additions, modifications, and deletions

There are ten (10) system reports on the above information. The last system report is the System Information report that provides needed information for tech support if you should ever have an issue with Intelli–Site Lite.

The following explains each 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 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**.

Cardholder Activity Report

The Cardholder Activity Report, **Cardholder Activity.rdl**, lists the readers at which a card has been seen. When this report is double-clicked, the **Report Parameters** dialog appears. 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 report columns are **Date/Time**, **Reader**, **Cardholder**, **Card Number**, **Site Code**, and **Status**. **Cardholder** is last name, first name. The report is sorted by **Date/Time**.

Custom History Report

The Custom History Report, **Custom History.rdl**, is used to create a history report with more search criteria than the normal history reports. This 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 to use these settings again in Reports View or in project programming.

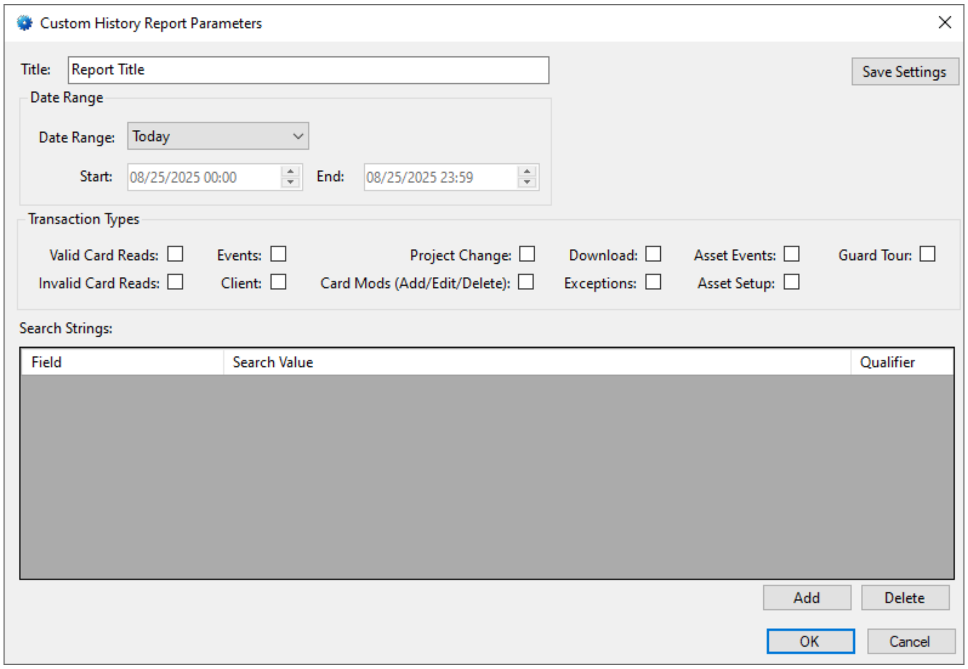


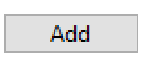
Figure 1773 – Custom History Report Dialog

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

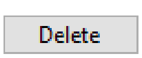
Date Range – Filters events to only those whose time matches the selected Start and End times. The Start and End times are automatically generated for all Date Ranges except for Custom.

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.



- button; add a row to the Search Strings table



- 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.

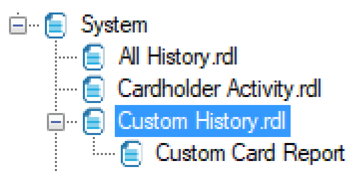


Figure 178 - Custom History Report Settings node

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**.

Download Report

The Download Report, **Download.rdl**, lists each card download. When this report is double-clicked, the **Report Parameters** dialog appears. The parameters are the Date Type, Start Date, and Stop Date.

The report header is two (2) rows. The columns of the first row are **Date/Time**, **Panel**, **Type**, and **Computer**. The columns of the second row are **Cardholder Name**, **Card Number**. **Cardholder Name** is "last name, first name". **Card Number** is in Cxxx Sxx Fxx format. The report is sorted by **Date/Time**.

Exceptions Report

The Exceptions Report, **Exceptions.rdl**, lists the exceptions. When this report is double-clicked, the **Report Parameters** dialog appears. The parameters are the Date Type, Start Date, and Stop Date.

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

Guard Tour Report

The Guard Tour Report, **Guard Tour.rdl**, lists the points in a guard tour that are activated as defined in the guard tour construct. When this report is double-clicked, the **Report Parameters** dialog appears. The parameters are the Date Type, Start Date, End Date, and Tour Name.

The report header has two (2) rows. The columns of the first row are **Date/Time**, **Tour Name**, **Start Time**, **End Time**, and **Total Time**. The columns for the second row are **Point**, **Time**, **Duration**, **Status**, and **Guard**. The report is sorted by the **Date/Time** the Guard Tour started, and is grouped by **Guard Tour**. If all the points assigned to the Guard Tour are readers, the **Guard** column will contain the name of the cardholder associated with the card that was read at each point.

I/O Activity Report

The I/O Activity Report, **IO Activity.rdl**, lists I/O Point activity. When this report is double-clicked, the **Report Parameters** dialog appears. The parameters are the Start Date, Stop Date, Point Name, Include Active, Include Normal, and Include Acked/Cleared.

The report columns are **Date/Time**, **Point**, **Status**, **User**, and **Comments**. The report is sorted by **Date/Time**.

Operator Report

The Operator Report, **Operator.rdl**, lists the operator (a.k.a. user) activity such as logon/logoff. When this report is double-clicked, the **Report Parameters** dialog appears. The parameters are the Start Date, and Stop Date.

The report header has two (2) rows. The columns of the first row are **Date/Time**, **Operator**, and **Computer**. The columns for the second row are **State\action**, and **Event**. The report is sorted by **Date/Time**.

Project Change Report

The Project Change Report, **Project Change.rdl**, lists the changes made to the Project. When this report is double-clicked, the **Report Parameters** dialog appears. The parameters are the Start Date, Stop Date, Operator Name, Computer, Change Type, and Key Word.

Change types are:

- Node Add
- Node Modify
- Node Delete
- Card Add
- Card Modify
- Card Delete
- Personnel Add
- Personnel Modify
- Personnel Delete
- Access Set Add
- Access Set Modify
- Access Set Delete

The report columns are **Date/Time**, **Operator**, **Computer**, **Change Type**, and **Data**. Key word is used to filter the **Data** column. The report is sorted by **Date/Time**.

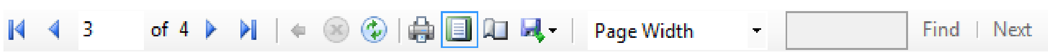
System Information Report

The System Information Report, **System Information.rdl**, provides a detailed list of the installed Intelli–Site Lite license, the Intelli–Site Lite components that have been installed as well as their versions; in addition it may include other system information. It is a tool for technical support if you ever need to contact them. It may take a few moments to generate this report.

Technical Support is trained to ask for this report for all incidents. If they fail to ask for it, the development team will riot. It's not a pretty sight. So please, generate this report and send it to tech support with your question.

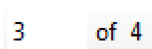
Report Toolbar

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

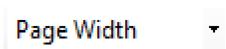
Refresh the report using the same parameters

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

RFID Management View

Note: RFID Management View is not available in Intelli–Site Lite. If RFID management is needed, contact your sales representative about upgrading.

Scheduled Events View

Scheduled Events View manages the scheduled events. A scheduled event is types of virtual point that can be programmed to set points based on time and date parameters and then clear those points when the time expires. For example, Software Giants, LLC is hosting an open house on Saturday, May 23, 2020 from 7:00am to 7:00pm. The user would create an event to unlock the Main Entrance. Then schedule that event to begin May 23, 2020 at 7:00am and end May 23, 2020 at 7:00pm.

This is the **Scheduled Events View** window.

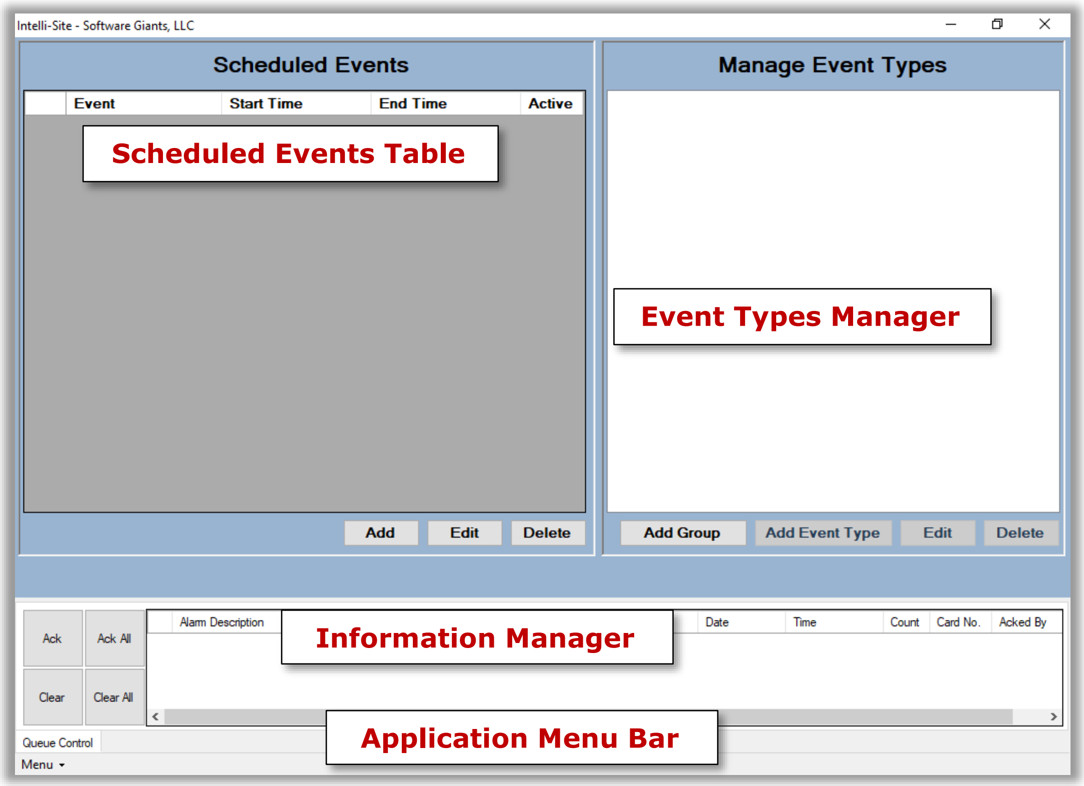


Figure 197 - Scheduled Events View

Event Type Manager – Add, edit, and delete event groups and event types

Scheduled Events Table – Contains the specific events and their activation and deactivation dates and times. Clicking on the column headers will sort the list by that column.

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

Application Menu Bar – Contains the Application Menu and the status of the license and SMA; see The Application Menu

Event Type Manager

The Event Type Manager is used to add, edit, and delete scheduled event groups and scheduled event types.

Scheduled Event Group – The means by which event types are organized

Scheduled Event Type - Contains all the points that will be set with the schedule begins and cleared when the schedule ends

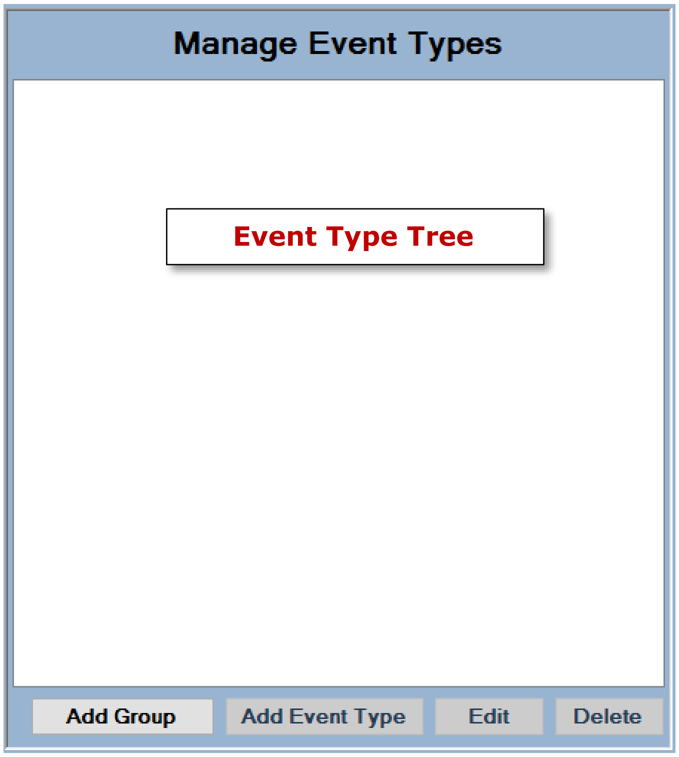


Figure 198 - Event Types Manager

Event Type Tree - Tree of Scheduled Event Groups, Scheduled Event Types, and the points assigned to each event

Add Group – Add a new Scheduled Event Group

Add Event Type - Add a new Scheduled Event Type to the selected Scheduled Event Group; disabled until an Event Group is selected

Edit - Opens the properties of the selected Scheduled Event Type or Scheduled Event Group; disabled until one is selected

Delete - Delete the selected Scheduled Event Group or Scheduled Event Type; disabled until an Event Group or Event Type is selected

Scheduled Event Group

Scheduled event groups organize scheduled event types. There must be at least one scheduled event group. When the Add Group button is clicked, a new scheduled event group node is added to the Tree and the properties dialog opened.

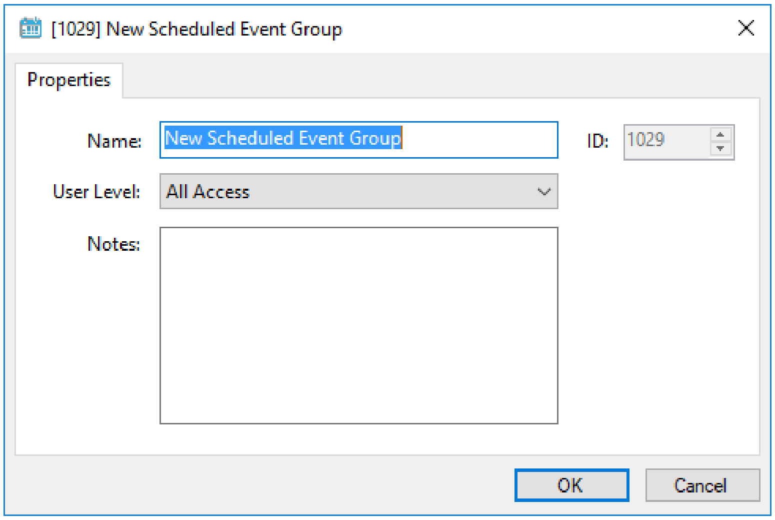


Figure 199 - Scheduled Event Group properties dialog

Rename the scheduled event group then click OK to save the changes. The Event Type Tree displays the new scheduled event group.

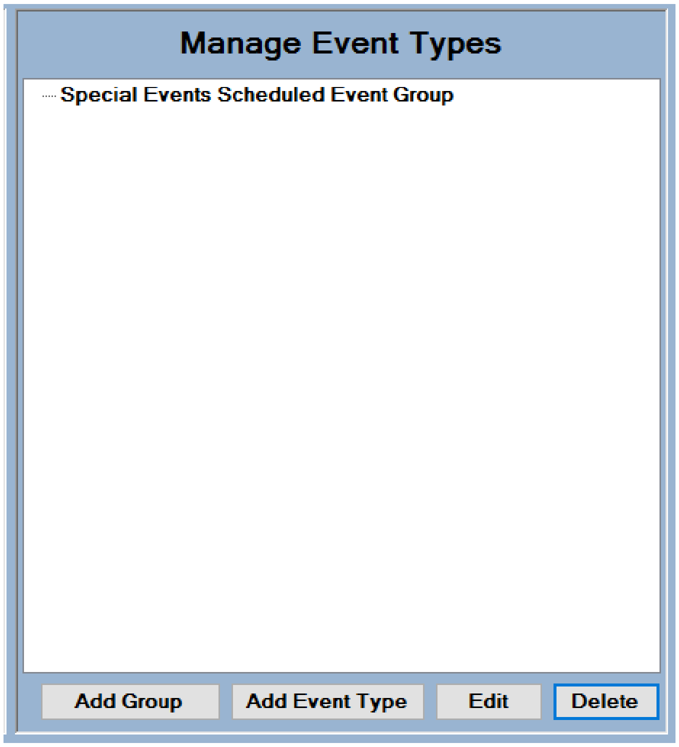


Figure 200 - Event Type Tree with a Scheduled Event Group

Scheduled Event Type

A scheduled event type defines the points that will be set on at the beginning of the scheduled event date and time and set off at the end.

Note: While an event schedule is active, all the points included in the event will be held in the set on state. If another operation or event would set off the point, the point will not be set off until all events that include the point are no longer active.

All scheduled event types must be part of a scheduled event group. The Add Event Type button is disabled until a scheduled event group is selected. Select the appropriate scheduled event group then click Add Event Type. A new scheduled event type is added to the selected group and its **Quick Config** dialog is opened.

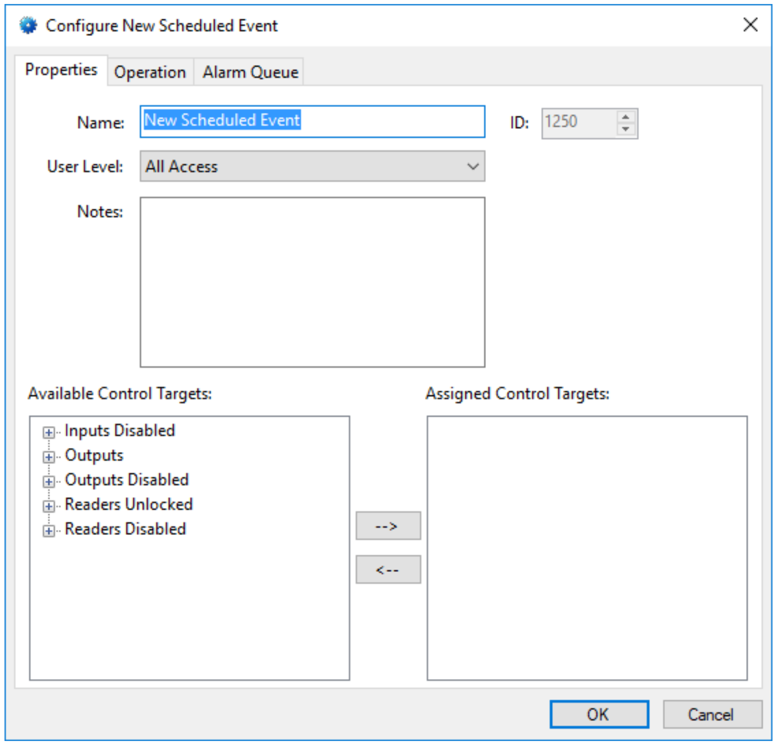


Figure 201 - Scheduled Event Type Quick Config dialog

There are three tabs on this dialog. For information about the ***Operation*** and ***Alarm Queue*** tabs, see Operation Tab and Alarm Queue Tab. The points are assigned to this scheduled event type on the ***Properties*** tab.

Name - The name for the node; the name doesn't have to be unique

ID - The unique identifier of this node; generated by Intelli–Site Lite

User Level - The User Level a user must possess to open the properties for this node, see User Levels

Notes - Any notes the user may have for the node

Available Control Targets – Tree of available points that can be set on by the scheduled event type

Assigned Control Targets – Tree of all points this scheduled event type will set on while the schedule is active

Points are moved between the two Trees by -->, <--, or double-clicking.

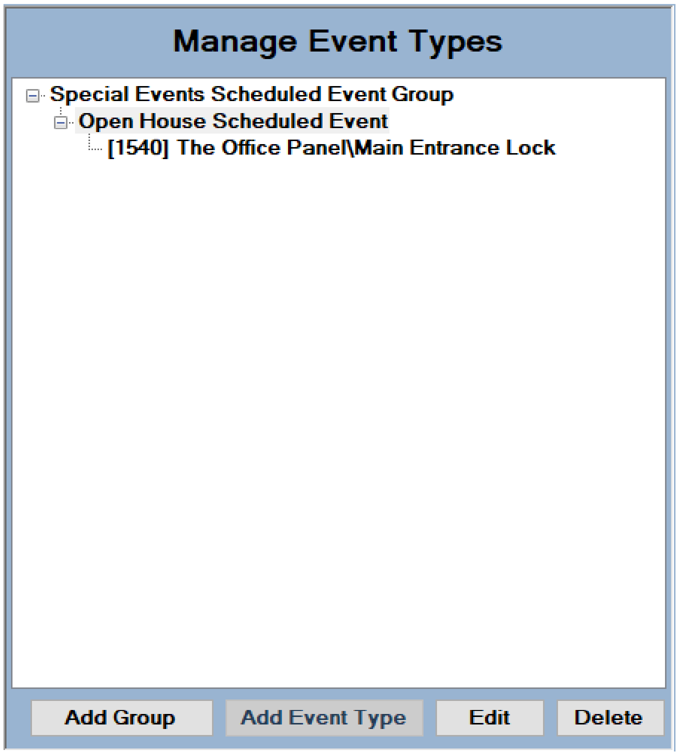


Figure 202 - Event Type Manager for the example

Scheduled Events Table

The Scheduled Events Table contains the timetable of scheduled events. Scheduled events are added, edited, and deleted here.

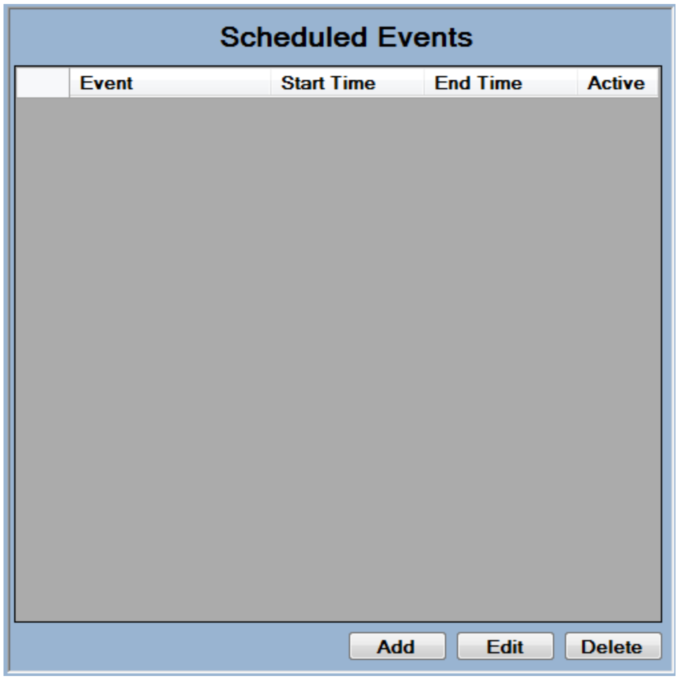


Figure 203 - Scheduled Events Table

Event – The event that will be activated at the designated start time and deactivated at the end time; the points on the event, if any, are set as well

Start Time – The date and time when this event will begin

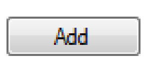
End Time – The date and time when this event will end

Active – Checkbox that is checked when the event is active and clear when it is not

---

Note: While an event schedule is active, all the points included in the event will be held in the Set On state. If another operation or event would Set Off the point, the point will not be set off until all events that include the point are no longer active.

Add a Scheduled Event

To add a scheduled event, click 

. The **Scheduled Event Data** dialog displays.

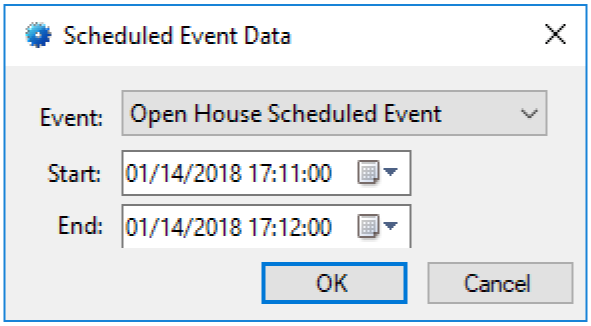


Figure 204 - Scheduled Event Data dialog

Event – Drop-down list of available Event Types

Start – The date and time the scheduled event will begin

End – The date and time the scheduled event will end

Select the desired event, set the Start date and time and the End date and time. Click OK. The new scheduled event is added to the Scheduled Events Table. All new events are added to the end of the table.

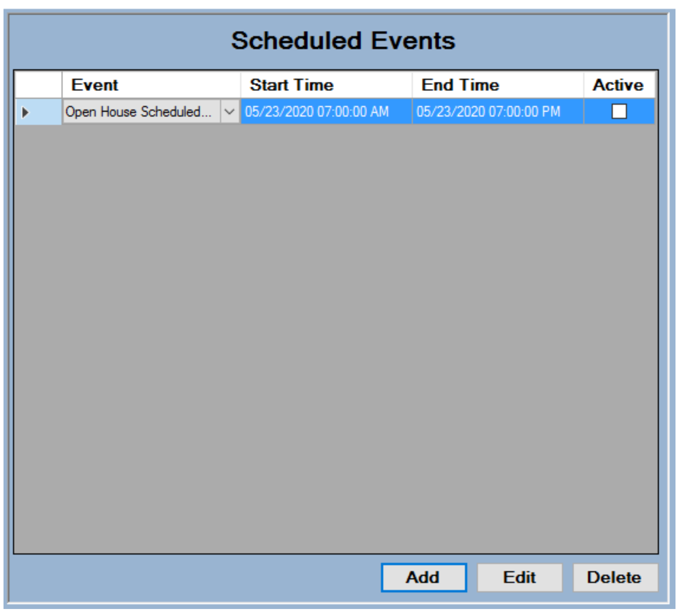


Figure 205 - Example Scheduled Events Table

Edit a Scheduled Event

To edit an existing scheduled event, highlight the desired event by clicking on it. The whole row will be blue when it is highlighted. Then click the Edit button. The **Scheduled Event Data** dialog for the highlighted event displays.

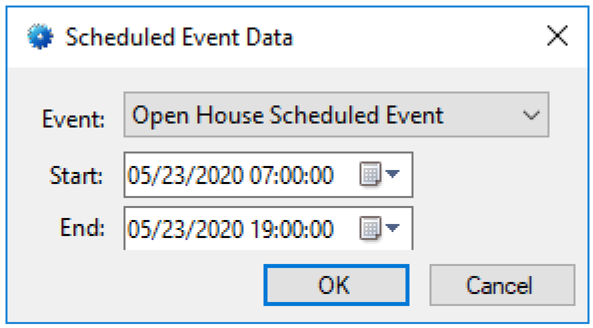


Figure 206 - Example Scheduled Event Data dialog

Make the desired modifications. Click OK to save or Cancel to abandon the changes.

Delete a Scheduled Event

To delete an existing scheduled event, highlight the desired event by clicking on it. The whole row will be blue when it is highlighted. Then click the Delete button. A **Confirm Delete** dialog displays. Click Yes to delete the event, No to keep the event.

Video View

Note: ***Video View is not available in Intelli–Site Lite. If video is needed, contact your sales representative about upgrading.***

The Information Manager

Intelli–Site Lite allows the user to monitor system activity and alarm conditions in real-time through the **Information Manager** (IM).

When the IM displays, it is visible in all Views, allowing alarms to be monitored while using other system features. The IM displays in the bottom portion of the screen.

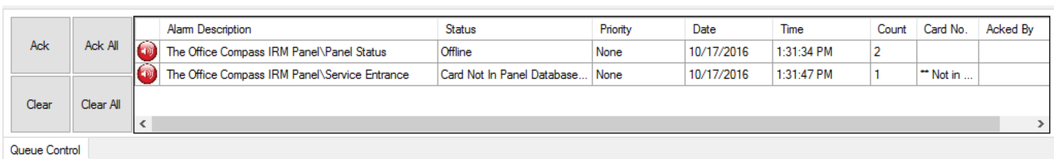


Figure 210 - Information Manager

Whether the IM displays or not is determined by the logged in user's properties. In addition, the layout of the IM as well as the actions allowed is configurable on a per user basis. The following sections will explain the ***Queue Control*** tab and configuring the IM Layout.

Queue Control

The ***Queue Control*** (Alarm Status) tab of the Information Manager is the default tab. It displays all the alarms that have been triggered. Conditions may also be displayed that are not alarm conditions but are events that have been set to be written to the queue.

Note: The properties Panel Will Transmit along with Add To Queue On High or Add To Queue On Low determine if an event is written to the Alarm Queue. These properties are found on the Operations tab.

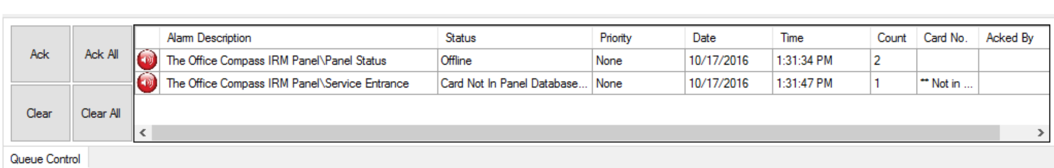


Figure 211 - Queue Control tab

Alarm Description - Displays the text description of the alarm

Status - Displays the status of the condition: for example, "Point is On"

Priority - Displays the priority assigned to the event (alarm); priorities are set in the properties of a node on the ***Alarm Queue*** tab.

Date - Displays the date of the occurrence

Time - Displays the time of day of the occurrence

Count - Displays the number of times the event/alarm has been occurred

Card No. – Displays the card number that triggered this event if applicable

Acked By – Displays the logon name of the user and the name of the computer from which the event was acknowledged if applicable

The data columns can be resized to suit individual users. Select the border between column headings to make the columns wider or narrower. Scroll bars automatically display when necessary to allow for scrolling up and down through the list or left and right if column data extends past the display boundaries.

A **Red Speaker** icon displays at the beginning of the alarm in the Queue Control list. The red speaker represents an event that **must** be acknowledged by an operator. When an event is acknowledged, the red speaker becomes a **Green Speaker** icon. The event can then be cleared from the queue.

Note: To ensure an event must be acknowledged, check the Acknowledge Required checkbox on the Operation tab in the properties of the event.

Not every event written to the queue must be acknowledged. Those that do not require acknowledgement appear in the queue with a **Green Speaker** icon instead of the red speaker.

An event can be acknowledged and cleared by using the Queue Control buttons or via the **Acknowledge/Clear** dialog.

Queue Control Buttons

After selecting an event from the queue display, the Control buttons are used to perform the designated action. Alarm conditions will continuously sound (loop) an audible alarm (if configured) until acknowledged.

The **Ack Event** button acknowledges the event and silences the audible alert (if configured to sound alert), but does not display a dialog.

The **Ack All Events** button acknowledges all events in the queue and silences the audible alerts (if any have been configured to sound one), but does not display a dialog.

The **Clear Event** button clears the selected event in the Queue Control window and silences any associated audible alerts.

The **Clear All Event** button clears all the events in the Queue Control window and silences any and all associated audible alerts.

***Note:** These are not the only available buttons. These are the buttons in the default Information Manager Layout. See Information Manager Layout for all the layout options.*

Acknowledge/Clear Dialog

An **Acknowledge/Clear** dialog can be displayed by clicking the right mouse button on the alarm text in the queue. This dialog performs the same function as the control buttons, but provides an area to input instructions or comments (for example, as to condition resolutions).

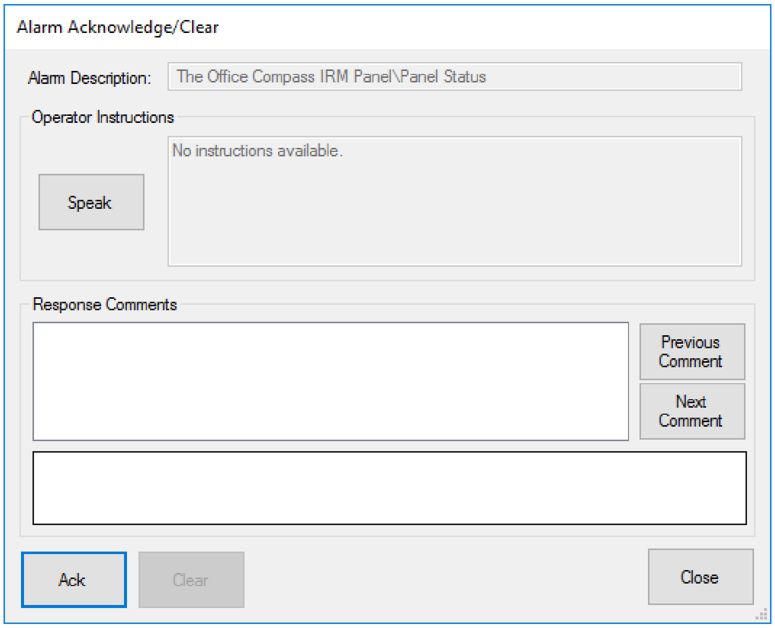


Figure 212 - Alarm Acknowledge/Clear dialog

The dialog will show the **Alarm Description**, **Operator Instructions**, **Response Comments** along with the **Ack Alarm**, **Clear** and **Close** buttons. If an event must be acknowledged before it can be cleared, the **Ack** button will be enabled and the **Clear** button disabled.

Shunt/Force Queue Control

This function is **not yet implemented** in Intelli–Site Lite. This is just to let you know it's coming.

Information Manager Layouts

The layout of the Information Manager can be customized. Multiple different layouts can be configured and assigned to individual users.

Modifications to the IM Layout and user properties can only be done in **Design View**.

Information Manager Layout Properties

To add a new Information Manager Layout, right-click on the Information Manager Layouts node and select *Add Node and Edit*. The new node is added to the Tree and its properties are opened. It is the hope of this author and the designers of the Intelli–Site Lite software, that the properties are self-evident. But in case they are not, see Information Manager Layouts for a detailed explanation of them.

Once a layout has been defined, it has to be assigned to a user.

User Properties: Information Manager Options Group

The Information Manager uses the Information Manager Layout specified in the Information Manager Options group of the properties of the logged in user.

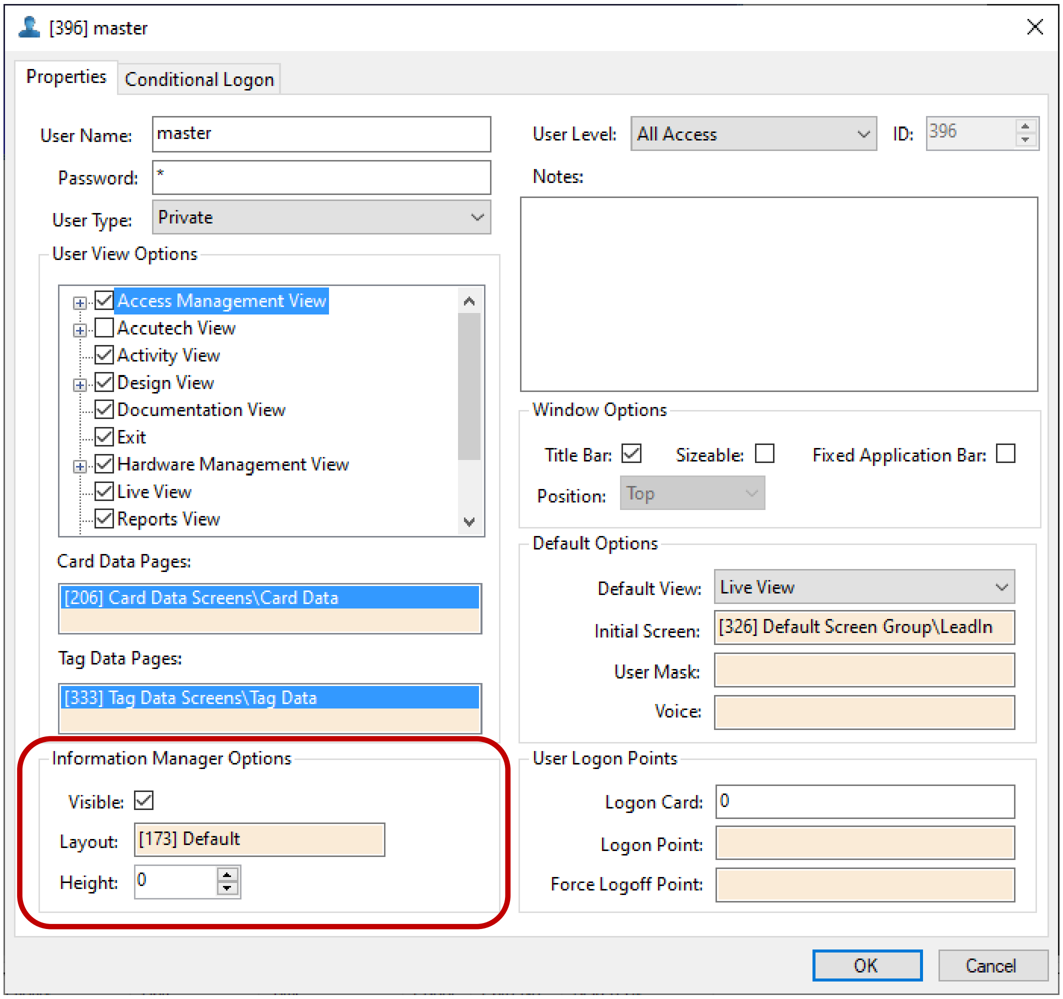


Figure 213 - master User Properties dialog

There are three fields in the Information Manager Options group.

Visible – checkbox; when checked the IM displays

Layout – drop box; the desired IM Layout for this user

Height – the height for the IM when it is initially drawn; the user can adjust the height as desired; 0 means to use the default height

The Project Node Tree

The Project Node Tree, or the Tree for short, contains all the building blocks of the Project.

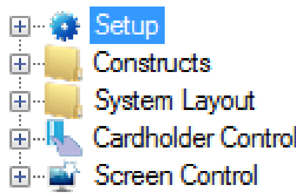


Figure 214 - The Project Node Tree

The Tree combines similar and related nodes into five folders.

Setup – Setup and maintenance of the Intelli–Site system

Constructs – The special functions provided by Intelli–Site to simplify programming

System Layout – The Sites, Areas, and panels for the Project

Cardholder Control – The building blocks for cardholder management and access control; the **Access Management View** is the interface for most of these nodes

Screen Control – The various screens including popup screens that are used in the Views especially **Live View**

Note: Not all nodes are visible in all versions of Intelli–Site. What is visible is controlled by licensing, version, and even user properties.

The Tree is managed using a context menu. Each node in the Tree is managed through its properties. These properties allow the user to program the behaviors and settings for the node. These properties are accessed through the Project Node Tree context menu.

This section will discuss:

- I/O Points and their functionality
- Properties, data types, and structures
- The Properties dialog and what is common to all

- The Project Node Tree Context Menu
- Copying and Moving Tree Nodes
- Each node in the Tree

I/O Points and Their Functionality

The basic building block of Intelli–Site is the I/O Point. It is a point that has two values: 1 or 0. These values, also known as states, can be considered high or low, on or off, active or inactive, etc. They can be linked to physical devices by Drivers, or they can be linked to nothing at all. They can be used to trigger actions, show the current state of an object, or just about anything you can think of.

The following nodes are the types of I/O Points:

- Panel I/O Points
- Virtual Points
- Counters
- Timers
- Automation Objects
- System Time Zones
- System Schedules
- System Notification Points
- System Monitors

All I/O Points share common functionality:

- Actions can be performed when the state of the point changes.
- I/O Points may be assigned as Control Points so that a given set of actions are only performed when Control Point is set on.
- I/O Points can be used as Display Control Points to show the visual state of a point when in **Live View**.

Properties, Data Types, and Structures

A property is a data field for a node. Each node has a number of properties that define what the node is, describe the behavior of the node, and define what Intelli–Site Lite will do depending on the state of the node. This section describes the different data types and structures of these properties.

Data Field Context Menus

There are two different context menus for data fields. Which context menu appears depends on the data field type. Not every field type has a context menu. Only data entry type fields and drag and drop type fields have context menus.

Data Entry Type Field Context Menu

Data entry type fields are numeric fields, text fields, and text list fields. The context menu is the standard Windows text box context menu.

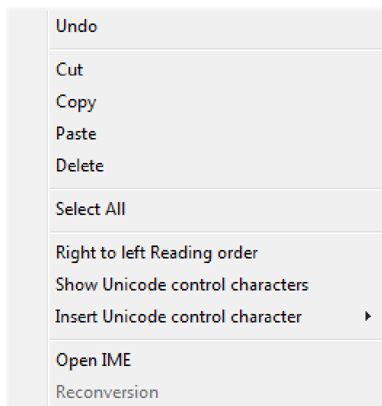


Figure 215 - Data Entry Type Field Context Menu

Undo – Undo the previous cut/copy/paste/delete; enabled when there is something to undo

Cut – Cut the selected text; only enabled when text is selected

Copy – Copy the selected text; only enabled when text is selected

Paste – Paste the content of the clipboard into the field; only enabled when there is something on the clipboard

Delete – Delete the selected text; only enabled when text is selected

Select All – Select all the text in the field

Right to left Reading order – Changes the reading order and justification

Show Unicode Control Characters – Display/hide Unicode control characters

Insert Unicode Control Character – Opens a side menu of the possible Unicode control characters that can be inserted

Open/Close IME – Open the Input Method Editor (IME) if it was installed. The IME is a Windows component.

Reconversion – Another IME option supplied by Windows. If you need it, you understand it. If you don't, it's too much to explain here, and you don't need it so why try?

Drag and Drop Type Field Context Menu

Drag and drop type fields have their own context menu. You can distinguish a drag and drop type field by their distinctive coloring. They are Antiquewhite RGB (250, 235, 215).

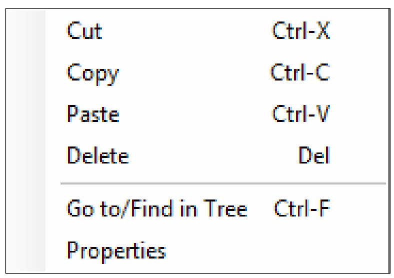


Figure 216 - Drag and Drop Type Field Context Menu

Cut – Copy the selected content to the clipboard and delete it from the target field

Copy – Copy the selected content to the clipboard

Paste – Insert the content of the clipboard into the target field

Delete – Delete the selected content from the field

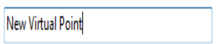
Go to/Find in Tree – Locate the node in the Project Node Tree; expand the Tree to expose the node and highlight it

Properties – Open the properties dialog of the selected content

Numeric Field

Numeric fields only allow integer data. The value can be modified using the keyboard or the up-down arrow control of the field. The **ID** field is a numeric field.

Text Field



Text fields allow the user to enter text data using the keyboard. The **Name** field is an example of a text field.

Text List Field

Text list fields allow the user to enter multiple lines of text data. The **Notes** field is an example of a text list field. Yeah, the picture doesn't really help.

Drag and Drop Field

Drag and Drop fields allow the user to drag and drop a node into them. Alternately, the user may click on the field to open a **Select Tree Item** dialog containing all the available nodes for the target field. This dialog only displays valid targets for the drop field.

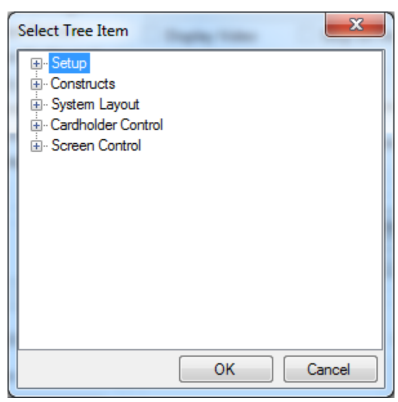
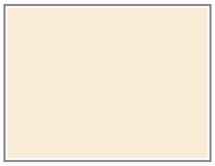


Figure 217 - Select Tree Item dialog

Dropping another node onto the field replaces the current value. The same holds true for a selection from the **Select Tree Item** dialog.

The color of a drag and drop field is Antiquewhite RGB (250, 235, 215).

Drag and Drop List Field



A drag and drop list field allows the user to drag and drop multiple nodes into it. Alternately, the user may click on the field to open a **Select Tree Item** dialog containing all the available nodes for the target field. This dialog only displays valid targets for the drop field.

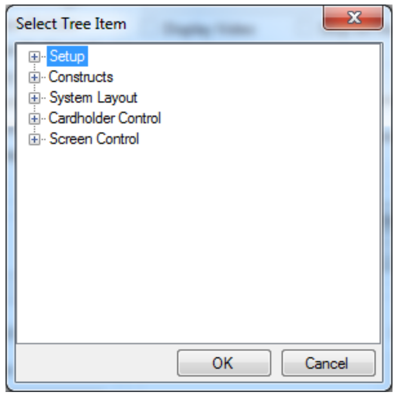


Figure 218 - Select Tree Item dialog

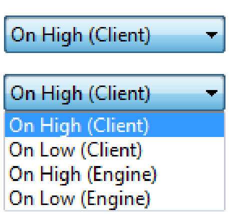
Dropping another node onto the field adds it the current value. The same holds true for a selection from the **Select Tree Item** dialog.

The color of a drag and drop list field is Antiquewhite RGB (250, 235, 215).

Checkbox

Checkboxes are commonly used on Properties dialogs. They identify when a specific item has been turned on or off, enabled or disabled. Several checkboxes can be selected at one time. Click on the checkbox to select or deselect it.

Drop-down list



Drop-down lists are used with some data fields. The menus are enabled by clicking on a small down arrow at the far right of the field. Click the down arrow to display the menu selections. Click the desired menu item to select it. The new selection will display in the data field.

Drop-down lists are also called combo boxes.

Action Grid

An action grid contains a user-defined set of instructions that are executed when specific conditions are met. The conditions are usually defined by the tab on which the action grid resides, or a nearby drop-down list.

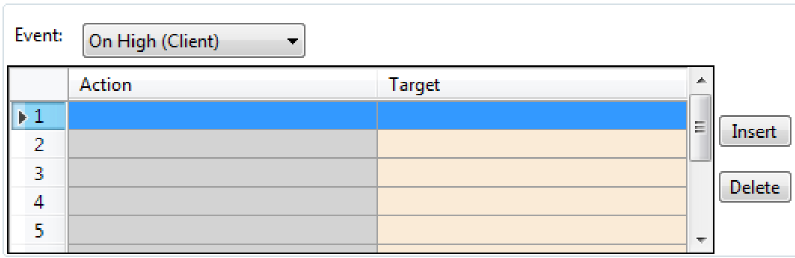


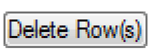
Figure 219 - An example Action Grid

Each grid contains the following fields:

Action: The action to be performed; click here to popup the **Actions** dialog. For definitions of available Actions, see Appendix II - Actions.

Target: The target of the action, if applicable

Inserts one or more rows equal to the number of rows selected in the table



Deletes the selected row(s)

Evaluation Grid

An evaluation grid is a table of up to 65,535 lines of points, their selections (if applicable), qualifiers and Boolean operators to be applied.

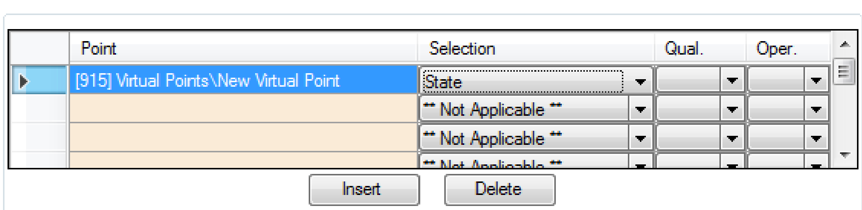


Figure 220 - An Example Evaluation Grid

Each grid contains the following fields:

Point: The point that is the target of this evaluation. The point can be one of the following:

- I/O Point such as a virtual point or a panel point
- Counter
- Timer
- Construct
  - Door
  - Alarm Zone
  - Custom Script
  - Scheduled Event
  - System Schedule
  - System Time Period

Selection: The state or value to which to compare the point. The possible selections are dictated by the point supplied. For the majority of the points, the selections are *State* or *Shunted*. The following have their own selections.

- Computer
  - *Current* – evaluates True if the user is logged in from this computer
  - *Locked* – evaluates True if the computer is locked using the **LockWorkstation** action; it will evaluate as True until an **UnLockWorstation** action is issued
- Door Constructs
  - *Open* – evaluates True if the Door Position Switch (DPS) is active
  - *Closed* – evaluates True if the DPS is not active
  - *Locked* – evaluates True only if the Door Lock is active
  - *Unlocked* – evaluates True if the Door Lock is not active
  - *Forced* – evaluates True only if the Door Forced point is active
  - *DOTL* – evaluates True only if the DOTL (Door Open Too Long) point is active
  - *DUTL* – evaluates True only if the DUTL (Door Unlocked Too Long) point is active
  - *CommFailure* – evaluates True if the door is in communication failure
  - *EntryAlarm* – evaluates True only if the Entry Alarm condition is active

  - *EntryICCallIn* – evaluates True only if the Entry Intercom is active
  - *EntryICBusy* – evaluates True if the Entry Intercom is busy
  - *EntryICConn* – evaluates True if the Entry Intercom is connected
  - *ExitAlarm* – evaluates True only if the Exit Alarm condition is active
  - *ExitICCallIn* – evaluates True only if the Exit Intercom is active
  - *ExitICBusy* – evaluates True if the Exit Intercom is busy
  - *ExitICConn* – evaluates True if the Exit Intercom is connected
- Call Station Construct
  - *N/A* – Not applicable, evaluates True if any of the following selection states are true
  - *CallIn* – evaluates True only if the Call-In condition is active
  - *Active* – evaluates True only if the Active condition is active
  - *AckTimeout* – evaluates True only if the Ack Timeout condition is active
  - *ProcessTimeout* – evaluates True only if the Process Timeout condition is active
  - *Disabled* – evaluates True only if the Call Station has been disabled
  - *Selected* – evaluates True only if the Call Station has been selected
  - *Tamper* – evaluates True only if the Tamper condition is active
  - *SecondaryCallIn* – evaluates True only if the Secondary Call-In condition is active
- Alarm Zone Construct
  - *N/A* – not applicable, evaluates True if any of the following selections states are true
  - *Selected* – evaluates True only if the Alarm Zone is selected
  - *Accessed* – evaluates True only if the Alarm Zone is accessed
  - *Alarm* – evaluates True only if the Alarm Zone is in Alarm
  - *MultipleAlarm* – evaluates True only if the Multiple Alarm condition is active

  - *Tamper* – evaluates this point as True only if the Tamper condition is active.
  - *Failure* – evaluates True only if the Failure condition is active
  - *AckTimeout* – evaluates True only if the Ack Timeout condition is active
  - *ProcessTimeout* – evaluates True only if the Process Timeout condition is active
  - *Sensor1Alarm* – evaluates True only if the Sensor 1 Alarm condition is active
  - *Sensor1Fail* – evaluates True only if the Sensor 1 Fail condition is active
  - *Sensor1Disabled* – evaluates True only if the Sensor 1 Disable condition is active
  - *Sensor2Alarm* – evaluates True only if the Sensor 2 Alarm condition is active
  - *Sensor2Fail* – evaluates True only if the Sensor 2 Fail condition is active
  - *Sensor2Disabled* – evaluates True only if the Sensor 2 Disable condition is active
  - *Sensor3Alarm* – evaluates True only if the Sensor 3 Alarm condition is active
  - *Sensor3Fail* – evaluates True only if the Sensor 3 Fail condition is active
  - *Sensor3Disabled* – evaluates True only if the Sensor 3 Disable condition is active
  - *Sensor4Alarm* – evaluates True only if the Sensor 4 Alarm condition is active
  - *Sensor4Fail* – evaluates True only if the Sensor 4 Fail condition is active
  - *Sensor4Disabled* – evaluates True only if the Sensor 4 Disable condition is active

Qual.: Modifier of the Point and Selection (if applicable) modified as follows:

- *None* - No modification
- *Ack* – Evaluates True if the point is acknowledged
- *Shunt* – Evaluates True if the point is shunted
- *Not* – Evaluates True if the point is not in this state (inversion)

Oper.: Boolean operator to apply to the point. Operators are evaluated in the order. Possible values are:

- *None*

- *And* – Indicates that the additional point must be active to initiate this state (It could represent multiple points.)
- *Or* – Indicates that one of the control points must be active to initiate this state
- *Not* – Indicates that the control point cannot be active to initiate this state
- *Xor* – Indicates that either control point, but not all can be active to initiate this state

Inserts one or more rows equal to the number of rows selected in the table

Deletes the selected row(s)

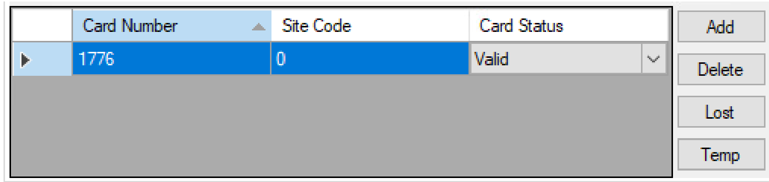
To add an item to the list - Click Add, the add button becomes Save. Type the item in the edit box next to the button. Click Save. The item is added to the list box above.

To edit an item in the list – Select the item in the list. The item appears in the edit box next to the buttons. Place the cursor in the edit box and change the text. The Add button becomes Save. When the item text is correct, click Save.

To delete an item from the list – Select the item in the list box then click Delete.

Table

A Table is a data control to allow the user to view or define data with multiple columns. Clicking on a column header will sort the table by that column. Tables are found in many places and in many forms. The table may have buttons associated with it, or it may just present the data rows.



Because the tables are so flexible, the buttons and data in the various tables are explained in detail on an individual basis. It is hoped they are intuitive for the most part.

The Properties Dialog

The properties dialog displays all the individual properties for any given node in the Project Node Tree. To examine the properties of a node, place the mouse on the node and click the right mouse button. In the resultant context menu, select *Properties*.

Each properties dialog may have several tabs. The following are common tabs found on many nodes.

- ***Properties*** tab (found on ***all*** nodes)
- ***Operation*** tab (found on all **I/O Point** nodes)
- ***Alarm Queue*** tab (found on all **I/O Point** nodes)
- ***Actions*** tab (found on all **I/O Point** nodes)

The Main Tab

Tree objects (nodes) are user-configured via their main tab. The name of the tab is different depending on the node, reflecting the kinds of settings required. Just what *can* be configured on a node varies; however, there are four common items that appear on every node's main tab:

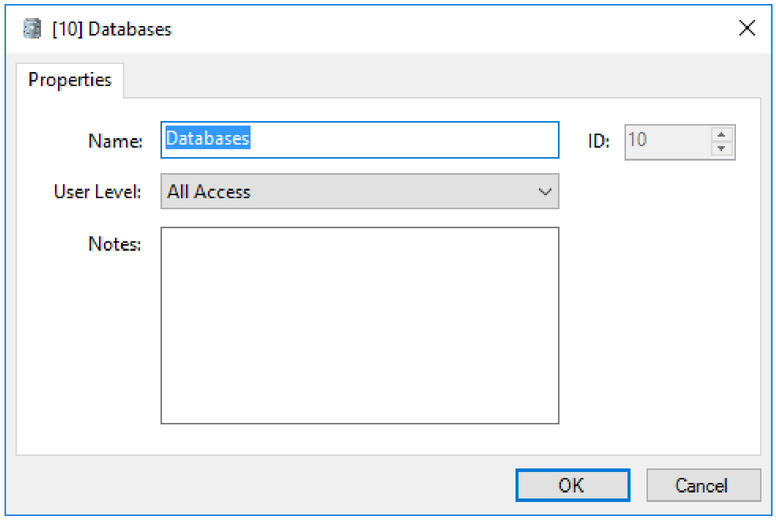


Figure 221 – The main tab of a properties dialog

Name - The name for the node; the name doesn't have to be unique

ID - The unique identifier of this node; generated by Intelli–Site Lite

User Level - The User Level a user must possess to open the properties for this node, see User Levels

Notes - Any notes the user may have for the node

Operation Tab

All I/O Points have an ***Operation*** tab.

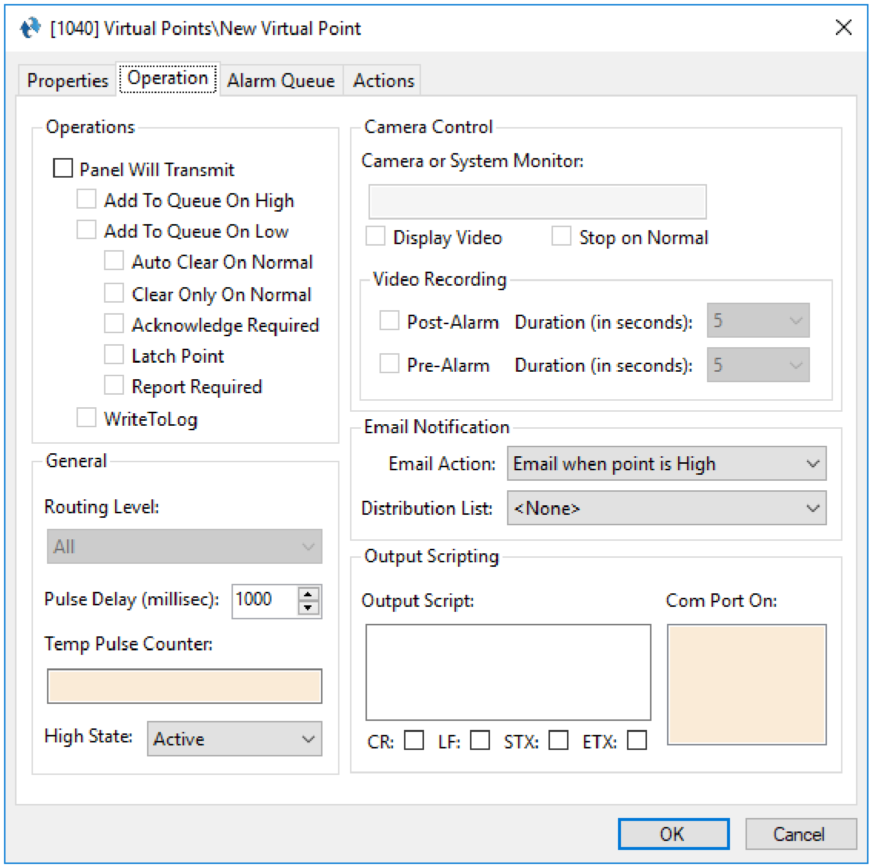
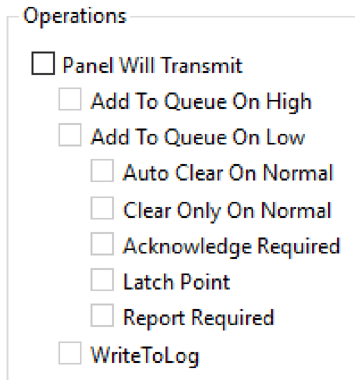


Figure 222 - The Operation tab of a Virtual Point

Operations

The fields in the Operations group allow the user to specify when the state of the I/O Point is reported in the Event Queue and/or Event Log and how the event report is cleared from the queue



Panel Will Transmit - If checked, this setting will determine whether the I/O Point's activity is transmitted. This selection also enables the controls below it. When this control is checked, the controls below it are enabled. The control settings below remain valid after the **Panel Will Transmit** box is unchecked. This allows the user to "lock" the other controls for editing once they have been previously set.

Add To Queue On High - Sends an alarm to the Information Manager (IM) Queue whenever the state of this I/O Point goes **High**. If this point already exists within the IM Queue and goes high subsequent times, its counter will increment to show how many times it went high, and the Date/Time will update to show its last transition.

Add To Queue On Low - Sends an alarm to the IM Queue whenever this I/O Point goes Low.

Auto Clear On Normal - Automatically clear the alarm from the IM Queue when the I/O Point's state returns to normal

Clear Only On Normal - Requires this I/O Point's state to be normal before it can be cleared from the IM Queue

Acknowledge Required - Requires the alarm in the IM Queue be acknowledged before it can be cleared

Note: "Acknowledge Required" takes precedence and negates the functionality of "Auto Clear on Normal". When using "Auto Clear on Normal" in conjunction with "Acknowledge Required", the user must manually clear the point from the queue after Acknowledging.

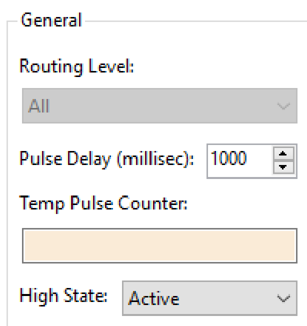
Latch Point - Lock the point's state **high** until the corresponding alarm in the IM Queue is acknowledged

Report Required - The user must enter a written report in the Ack/Clear dialog before the alarm can be cleared from the IM Queue

Write to Log File - Writes I/O Point activity to the Intelli–Site Lite log file. Reports can be run against this log file.

General

The settings that define the behavior and visibility of the I/O Point are found in the General group box.



Routing Level - The Routing Level a computer must have to receive this point's activity and alarm updates, see Routing Levels; the default Routing Level is *All*, all computers can see this point's activity and alarm updates

Pulse Delay - The duration the point is set before returning to a normal state. The expected value is in milliseconds, so 1000 = 1 second. This field exists on all I/O Points except Timers.

Note: Timers have the field Timer Duration instead of Pulse Delay. See.

Temp Pulse Counter – When a counter is supplied, the value of the counter defines the duration of the pulse delay in minutes. This field is not available for Timers.

High State – Defines which state is the high state: **Active** or **Normal** (on or off, 1 or 0).

Camera Control

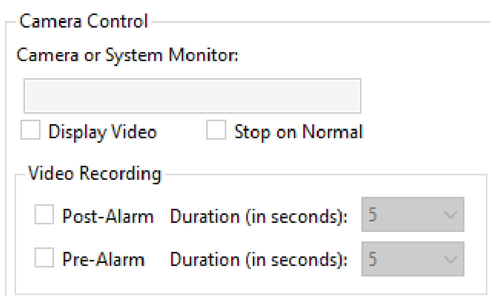
For an event for an I/O Point in the queue, it is possible to display related video. This group box holds the fields that configure and manage video display.

How these fields behave is different depending on the node dropped in the **Camera or System Monitor** field. It can be a video capture device directly connected to the system or one that is attached to a properly configured DVR/NVR. If the video capture device is attached to a DVR/NVR, the DVR/NVR is responsible for recording. It is expected and required that the DVR/NVR is continuously recording. For a device that is not connected to a DVR/NVR, Intelli–Site Lite itself must handle the recording.

The following sections explain what the fields mean and do for each type.

Video Capture Device Operation

The following assumes that an approved video capture device is connected to the system and is properly configured.



Camera or System Monitor – The video device to use when displaying event-related video

Display Video – Selecting an alarm in the IM Queue will display a live video feed from the above Camera or System Monitor. The live video feed window includes control buttons:

- Live – start or resume live video feed
- Freeze – freeze the current view
- Record – start a recording of the live video feed
- Stop – stop the recording
- Exit – dismiss the live video feed window

Stop on Normal – When checked, the video feed will not start if the point in the Queue is in a normal state.

Video Recording sub-group box – Define when video is recorded as an event for this I/O Point is written to the Queue

Post-Alarm – checkbox; enable Post-Alarm recording; when this point goes high, it will begin recording the video feed automatically

Post-Alarm Duration (in seconds) – drop-down list (default *5*); defines how long, in seconds, to record a Post-Alarm event; values are *5*, *10*, *15*, *30*, *45* or *60* seconds

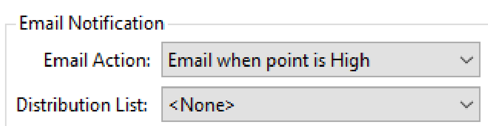
Pre-Alarm – checkbox; enable Pre-Alarm recording; the video feed continuously records to a temporary file. Upon alarm, the video feed writes to a permanent video file.

Pre-Alarm Duration (in seconds) – drop-down list (default *5*); defines how long, in seconds, a Pre-Alarm event records; the total length of the recorded video will be Pre-Alarm Duration + Post-Alarm Duration; values are 5, *10*, *15*, *30*, *45* or *60* seconds

Email Notification

When an alarm is written to the alarm queue, an email notification can be sent. The fields in this group box define when and to which distribution list the email is sent.

Note:* *For email notification to work, the email settings in the properties of the Setup node must be configured. See Email Setup.



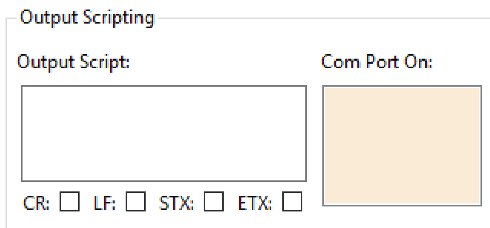
Email Action – drop-down list (default *Email when point is High*); email will be sent when the selected state change has occurred for this point; values are *Email when point is High*, *Email on point state change*, or *Email when point is Low*

Distribution List – drop-down list containing all the defined distribution lists; see Distribution Lists

Output Scripting

Output scripting is a means to send a HEX command to a COM port when the I/O Point goes active.

Note:* *Use of this advanced feature requires understanding of both HEX scripting and the protocol used by the target device intended to receive COM commands.



Output Script – The text that will be sent in HEX format

Com Port On – The COM port to which the script will be sent; drag and drop the Computer node to which the panel is attached

Formatting

CR – Carriage Return
LF – Line Feed
STX – Start of Text
ETX – End of Text

Alarm Queue Tab

All I/O Points have an ***Alarm Queue*** tab. Here the user defines the labels and actions as they relate to the alarm queue itself.

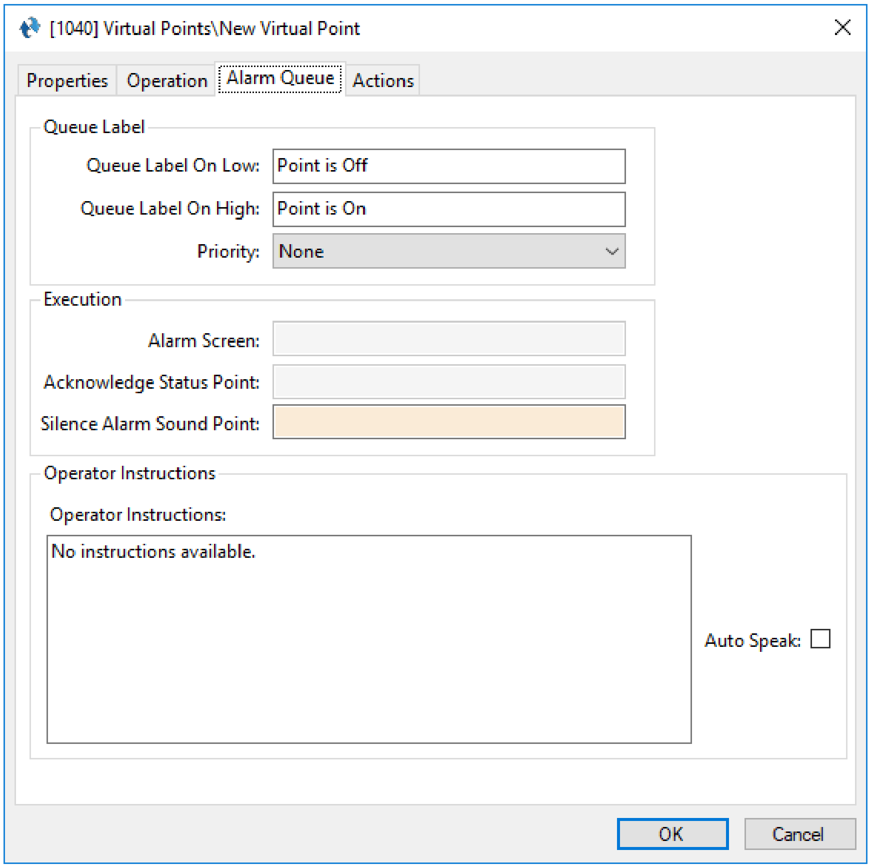
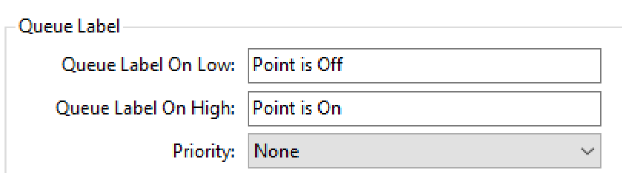


Figure 223 - The Alarm Queue tab of a Virtual Point

Queue Label

This set of properties allows the user to define the labels used in the IM Queue.



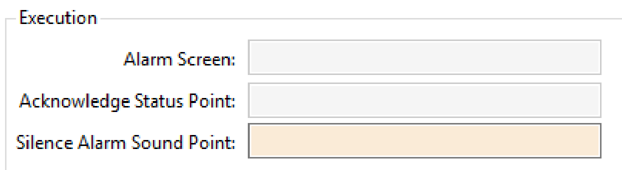
Queue Label On Low - The label to be used in the IM Queue when this point is low.

Queue Label On High - The label to be used in the IM Queue when this point is high.

Priority – Defines the priority of this point. The alarms in the queue are displayed according to priority by default. See section Priorities.

Execution

The properties in the **Execution** group box define the behavior when the alarm for this point is acted upon (e.g., selected, acknowledged, etc.)



Alarm Screen – The screen to display when the alarm in the queue is selected

Acknowledge Status Point – The I/O Point that will be set when the alarm is acknowledged

Silence Alarm Sound Point – When the provided I/O Point is high, any sound associated with the alarm will be silenced; does not affect the alarm's Acknowledge or Clear status

Operator Instructions

This group of fields allows a set of instructions to be issued verbally to the user when this I/O Point changes state from low to high.

Operator Instructions - The text to be spoken, via Windows Text-to-Speech if **Auto Speak** is checked; spoken only once - upon the point's transition to its active state

Auto Speak - Initiate Text-to-Speech announcement of the text message written in the instructions text box

Actions Tab

All I/O Points have an ***Actions*** tab. The ***Actions*** tab is where the automated actions and queue actions are defined. The automated actions are executed when the I/O Point is set (High) or cleared (Low). The queue actions are executed when the event is selected in the alarm queue or when the 'Action' button is clicked. For more information about the 'Action' button, see Information Manager Layout.

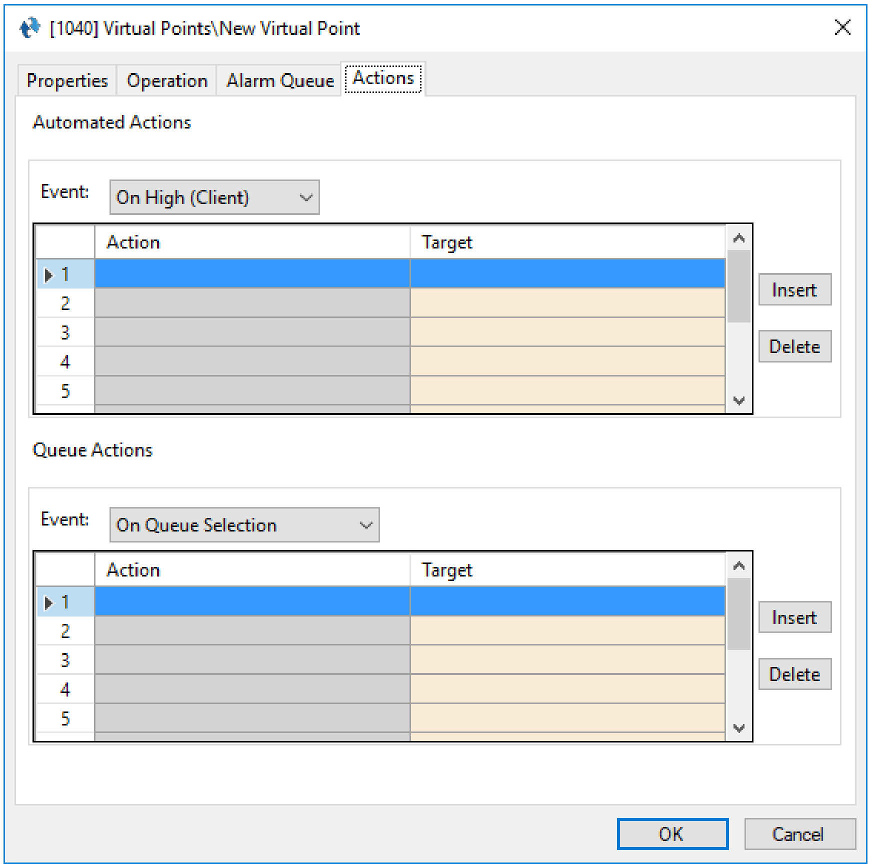


Figure 224 – The Actions tab of a Virtual Point

Automated Actions

Intelli–Site Lite can automatically execute user-specified actions when the state of an I/O Point changes. These actions are defined and stored in action grids. There are four different action grids for the Automated Actions.

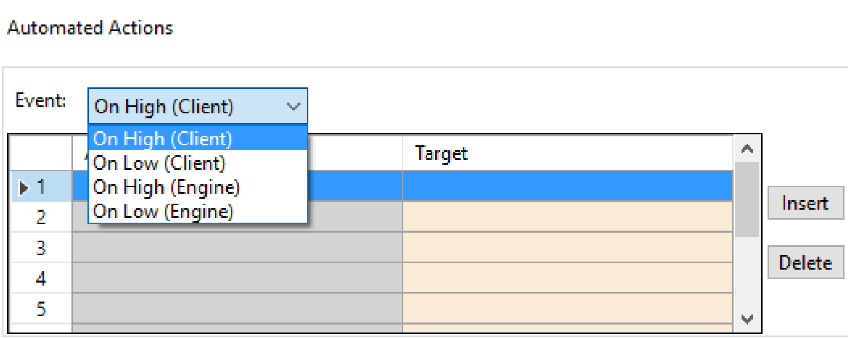


Figure 225 - Automated Actions Grid Types

Clicking on the Automated Actions **Event** drop-down list reveals *On High (Client), On Low (Client), On High (Engine),* and *On Low (Engine).* Actions on the (*Engine)* grids are executed by the Engine and happen whether a Client is attached or not. The actions in the *On High (Client)* and *On Low (Client)* grids are executed by the Client and will only happen if the Client is attached to the Engine. In addition, they will execute on every Client attached to the Engine when the I/O Point changes to the indicated state. The *On High* action grids are executed when the I/O Point changes to the high state. The *On Low* action grids are executed when the I/O Point returns to the low state.

Note: The (Client) action grids are only run on the Desktop Client when a user is logged in. In fact, they are run on every Desktop Client that is logged in. If no Desktop Client is logged in, THE (Client) GRIDS ARE NOT EXECUTED.

Queue Actions

The Queue Actions group box is where actions associated with an alarm for an I/O Point are defined.

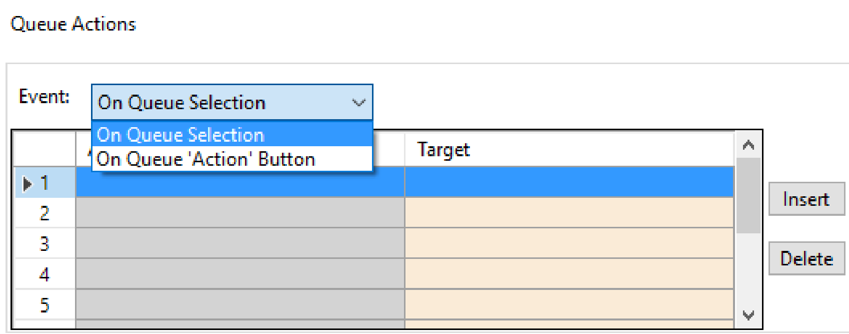


Figure 226 - Queue Actions Grid Types

There are two Queue Actions grids, one for each **Event** menu option:

On Queue Selection - execute the commands in the grid when the alarm is selected in the Alarm Queue

On Queue 'Action' button - execute the commands in the grid when the **Action** button in the Information Manager is pressed.

Obviously, the alarm must be selected first.

Note: The Action button is not visible by default. For more information about the Information Manager and its buttons, see [Information Manager Layouts](#).

The Project Node Tree Context Menu

Before diving into the contents of the Project Node Tree, we need to discuss the context menu. This menu is the primary means of managing the Tree. To open the context menu, place the mouse cursor on a node and hit the right-click button. Not all the options in the context menu are applicable to all nodes. And there are some options that only appear under certain conditions.

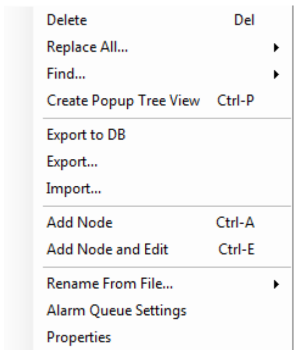


Figure 227 – The Project Node Tree Context Menu

Delete

Selecting *Delete* will permanently delete the target node and all its child nodes. A confirmation dialog will appear to make sure you really want to delete it because deleting a node cannot be undone. Pressing the Delete key (Del) is the same as selecting this option.

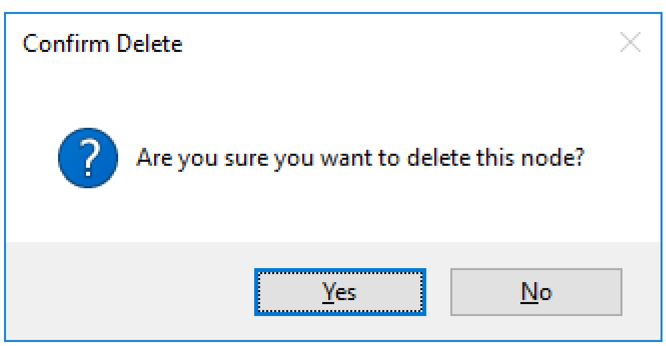
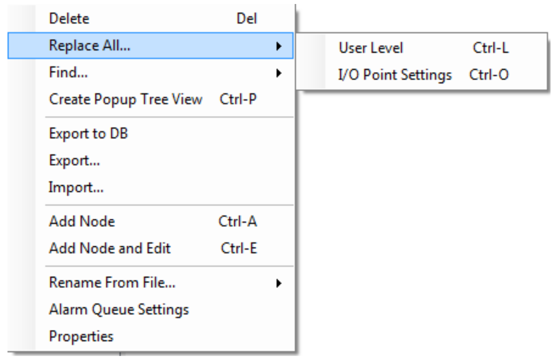


Figure 228 - Confirm Delete dialog

Replace All...

Replace All... opens the *Replace All...* side menu.



Replace All... User Level

The *Replace All... -> User Level* option allows the user to set the user level of the target node and all its child nodes. See User Levels.

When it is selected, a Replace All User Levels dialog opens. Select the desired user level for this node and all its child nodes.

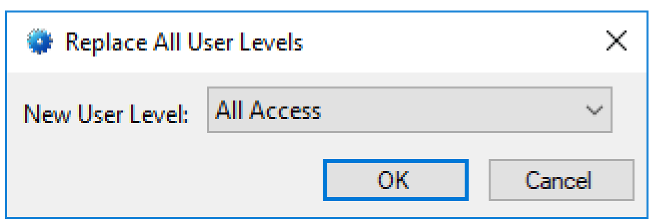


Figure 229 - Replace All User Levels dialog

Replace All... I/O Point Settings

The *Replace All...->I/O Point Settings* option opens the **Alarm Queue Settings Summary** dialog which allows the user to set the alarm queue settings of the ***Operation*** and ***Alarm Queue*** tabs of all I/O Points of this node and all its children.

Intelli–Site Lite finds all the I/O Points for the target node and its children and presents them in the dialog. Here all the settings can be changed as a whole or individually.

The top row is Filter By. To filter the Alarm Queue Settings table, set the columns in this row including the Point Name column to the desired filter criteria. When a checkbox is checked, those I/O Points with this setting checked will be included. An I/O Point must match all of the filter criteria to be displayed.

The second row is Replace All Settings. Any settings in this row modify the existing settings for every I/O Point in the table that is displayed. If the table has been filtered, only those I/O Points that match the filter criteria will be affected. If an I/O Point is modified individually, those individual modifications are applied after the Replace All Settings are applied.

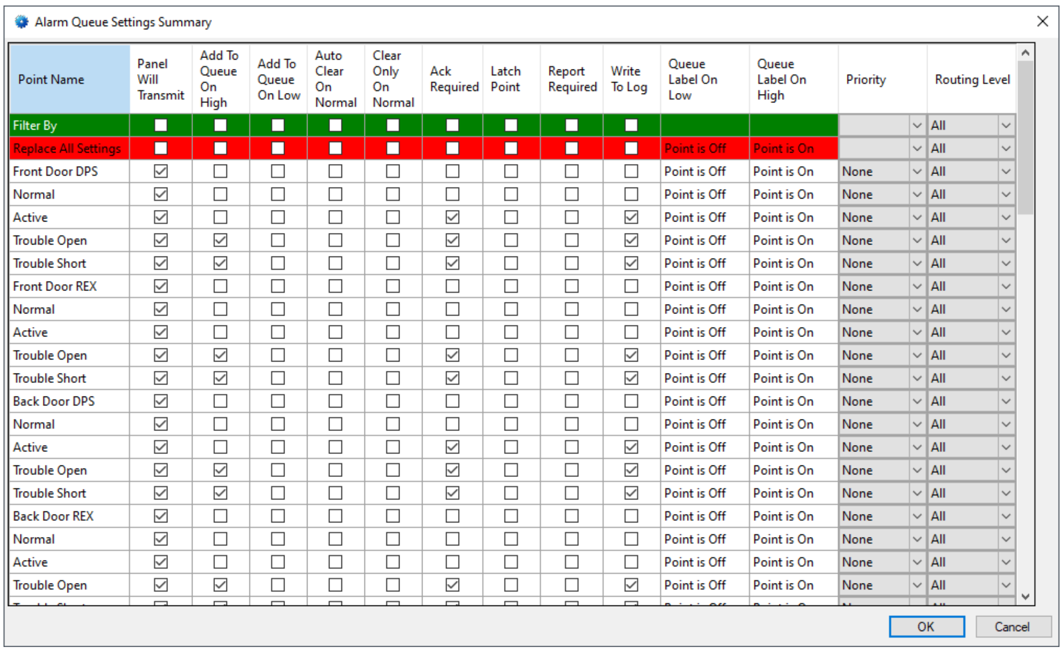


Figure 230 - Alarm Queue Settings dialog

Point Name – the name of each I/O Point Intelli–Site Lite located

Panel Will Transmit - If checked, this setting will determine whether the I/O Point's activity is transmitted. This selection also enables the controls below it. When this control is checked, the controls below it are enabled. The control settings below remain valid after the Panel Will Transmit box is unchecked. This allows the user to "lock" the other controls for editing once they have been previously set.

Add To Queue On High - Sends an alarm to the Information Manager (IM) Queue whenever the state of this I/O Point goes High. If this point already exists within the IM Queue and goes high subsequent times, its counter will increment to show how many times it went high, and the Date/Time will update to show its last transition.

Add To Queue On Low - Sends an alarm to the IM Queue whenever this I/O Point goes Low.

Auto Clear On Normal - Automatically clear the alarm from the IM Queue when the I/O Point's state returns to normal

Clear Only On Normal - Requires this I/O Point's state to be normal before it can be cleared from the IM Queue

Acknowledge Required - Requires the alarm in the IM Queue be acknowledged before it can be cleared

---

Note: "Acknowledge Required" takes precedence and negates the functionality of "Auto Clear on Normal". When using "Auto Clear on Normal" in conjunction with "Acknowledge Required", the user must manually clear the point from the queue after Acknowledging.

Latch Point - Lock the point's state **high** until the corresponding alarm in the IM Queue is acknowledged

Report Required - The user must enter a written report in the Ack/Clear dialog before the alarm can be cleared from the IM Queue

Write to Log File - Writes I/O Point activity to the Intelli–Site Lite log file. Reports can be run against this log file.

Queue Label On Low - The label to be used in the IM Queue when this point is low.

Queue Label On High - The label to be used in the IM Queue when this point is high.

Priority – Defines the priority of this point. The alarms in the queue are displayed according to priority by default. See section Priorities.

Routing Level – Defines the routing level for this point. Routing levels and routing masks are used to determine which computers will receive state changes for a point. See Routing Levels

Find...

Find... opens the *Find...* side menu.

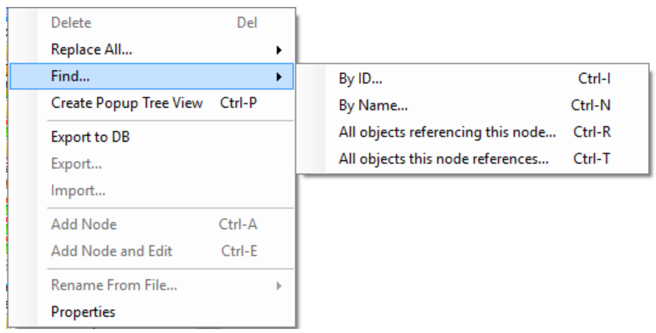


Figure 231 - *Find...* side menu

The different *Find...* options provided different ways to located nodes.

Find... By ID

Find... -> By ID... opens the **Find Node By ID** dialog which allows the user to find a specific node by its ID number. This searches the whole Project Node Tree for the node no matter where the search was started.

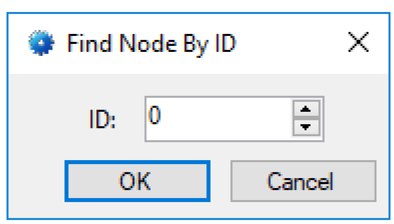


Figure 232 - Find Node By ID dialog

Find... By Name

Find... -> By Name... opens the **Find Node by Name** dialog which allows the user to find a node by its **Name** field.

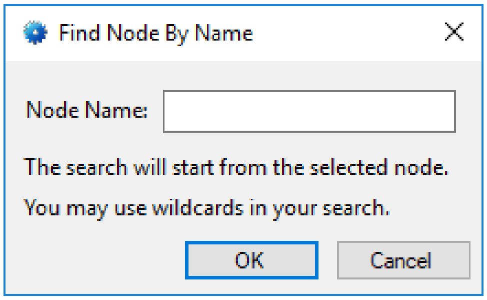


Figure 233 - Find Node By Name dialog

Since node names are not required to be unique, the search starts at the selected node and iterates through its children and not the entire Tree. It finds the first node that matches the specified name. If it searched the whole Tree and there were two nodes with the same name, Intelli–Site Lite would find the same node over and over again. Limiting the search to the branch of the Tree allows the user to control the search process.

Find... All objects referencing this node...

Find… All objects referencing this node… searches the entire Project Tree for other nodes that reference the target node. The user can limit the search to only look for the target node or the target node and its child nodes, descendants.

Selecting *All objects referencing this node...* opens a message dialog asking if the search should include the selected nodes descendants.

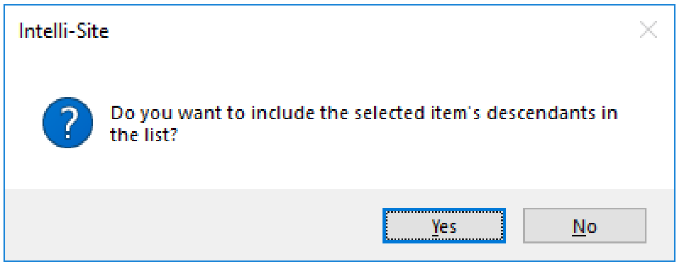


Figure 234 - Include Descendants dialog

Intelli–Site Lite searches the entire Tree for the selected node and its descendants if so desired. It will present an **Objects Referencing This Node** dialog displaying a list of nodes found. If none were found, the list is empty.

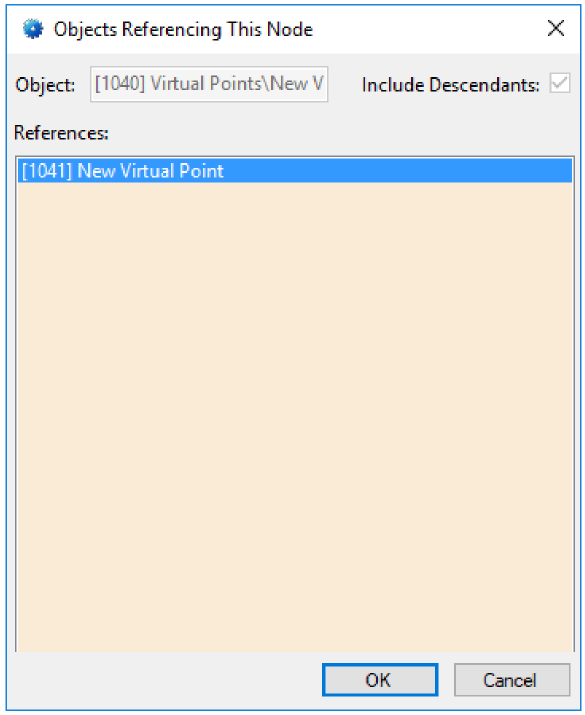


Figure 235 - Objects Referencing This Node dialog

Note: A right-click context menu is available for the nodes listed. This menu allows you to copy, Go to/Find in Tree, and open the Properties of the target node.

Find… All objects this node references…

Find… All objects this node references… searches the properties of this node to find all other nodes it uses. The user can also include the descendants of the selected node in the search.

Selecting *All objects this node references…* opens a message dialog asking if the search should include the selected nodes descendants.

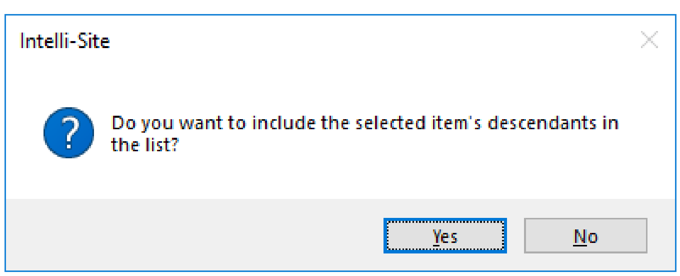


Figure 236 - Include Descendants dialog

Intelli–Site Lite searches the properties of the selected node and its descendants if so desired. It will present an **Objects This Node References** dialog displaying a list of nodes found. If none were found, the list is empty.

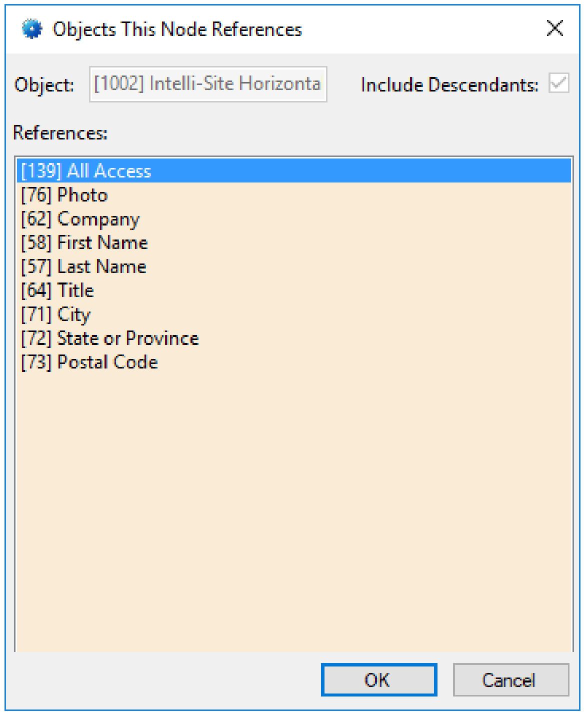


Figure 237 - Objects This Node References dialog

Note: A right-click context menu is available for the nodes listed. This menu allows you to copy, Go to/Find in Tree, and open the Properties of the target node.

Create Popup Tree View

The *Create Popup Tree View* option opens a popup dialog of the Tree branch starting at the selected node.

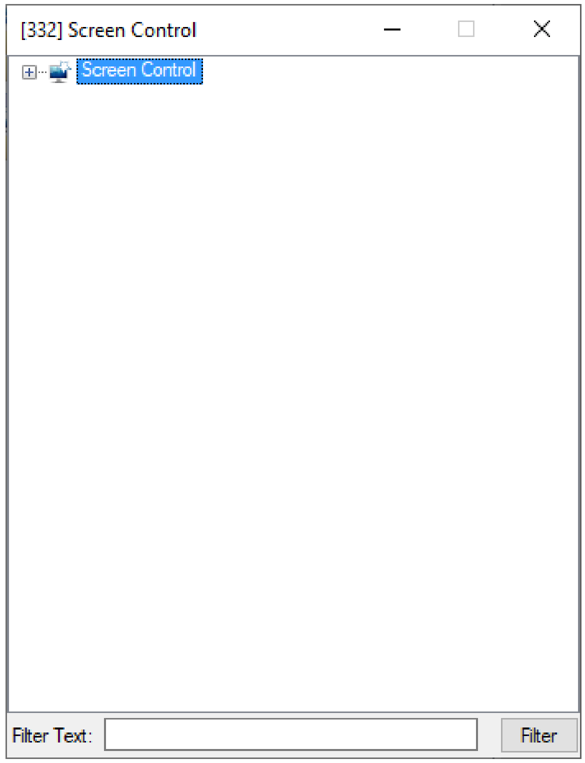


Figure 238 - Popup Tree View dialog

Click the [+] symbol to expand the tree list.

The tree list can be filtered to only show nodes and their branches that contain the filter text in their name. Type the text in **Filter Text** textbox then click .

Note: ***Filter Text is case sensitive. Intelli–Site searches the tree list and finds those nodes whose name contains the filter text as you typed it. The nodes are displayed as a tree list.***

For example, a customer reports a camera's name is misspelled. It is "camer 1" instead of "Camera 1". I can simply search for the misspelling in the popup tree and find the offending node.

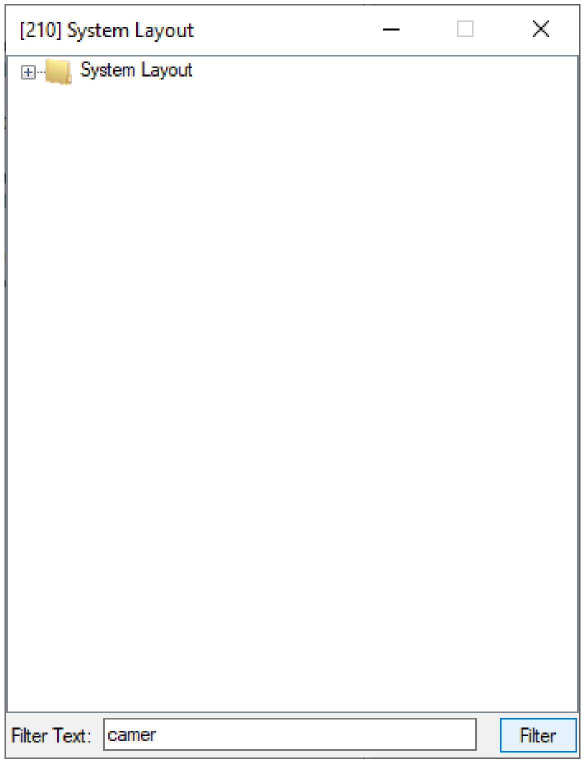


Figure 239 - Popup Tree View after filtering

You do have to manually expand the tree to find the end node. There may be multiple nodes that match the specified filter text. Therefore, the root of the tree list is displayed compact and neat.

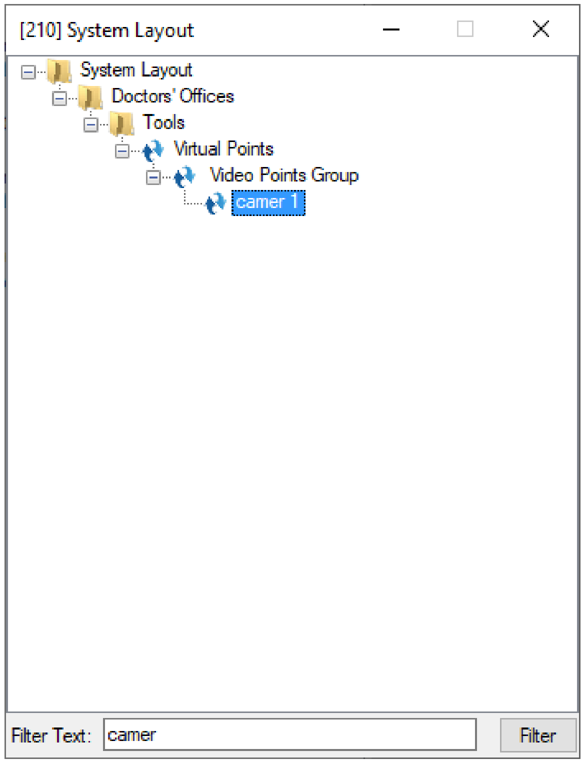


Figure 240 - Pop up Tree View after filtering and expanding

To clear the filter, delete the filter text then click 

again. The full tree list is restored.

Export to DB

Not Yet Implemented

Export…

Export… option allow the user to export a screen, a screen object, or a panel node. The process of exporting any node will also export the child nodes of the object. When this option is selected, the **Export node as** dialog appears. The default location is the user's Documents folder. The file type is *.ex4.

Import…

Import… option allows the user to import a previously exported screen, screen object, or panel object. When this option is selected, the **Import node from** dialog appears. Only files of type *.ex4 are listed. The default location is the user's Documents folder.

When a valid export file is opened, the **Import** dialog is displayed.

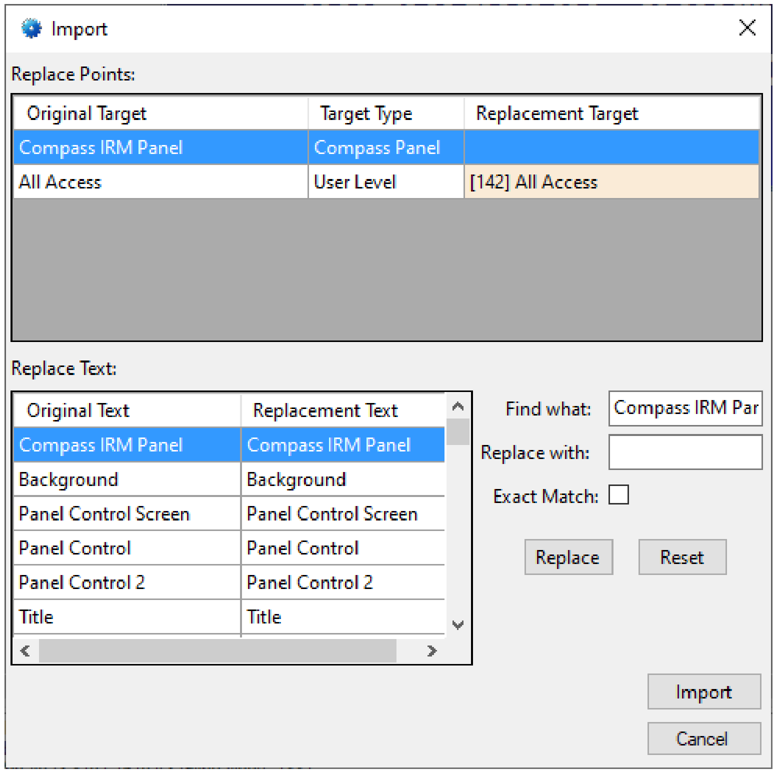


Figure 241 - Import dialog

Replace Points – table; lists all the points that can be replaced on import to fit the current project.

> **Original Target** – the nodes/points in the import file that can or must be replaced for this project
>
> **Target Type** – the type of point the **Original Target**
>
> **Replacement Target** – the nodes/points that will replace the **Original Target**; the replacement target must be the same type as the **Target Type**; when the **Original Target** point is part of the Intelli–Site application, the **Replacement Target** is populated with the corresponding point in the current project

Replace Text – table; lists the exported text strings allowing the user to specify different text

> **Original Text** – the text strings in the import file

Replacement Text – the text to replace the original text

- button; when clicked, import will begin

Note: Import of child nodes of panels is based on indexes within the Original Target.

For example, a virtual point is part of the exported screen object. The Export process recorded the panel type, the group index, and the virtual point index. On import, the user must supply the Virtual Point panel of the current project, not the individual virtual point. The Import process will use these indexes in the supplied replacement Virtual Point panel to replace the individual virtual point.

It is possible that the replacement target does not have a node at the indexes of the original exported object. If that is the case, the target object is left blank. No warning is given. It is assumed the user knows what he is doing since this is an advanced operation.

Add Node

Add Node option adds a node to the selected node.

Add Node and Edit

Add Node and Edit option adds a node and opens its properties dialog.

Add Multiple…

Some nodes need a quick way to add many child nodes for example, virtual points. A new option is added to the context menus for those nodes, *Add Multiple...*.

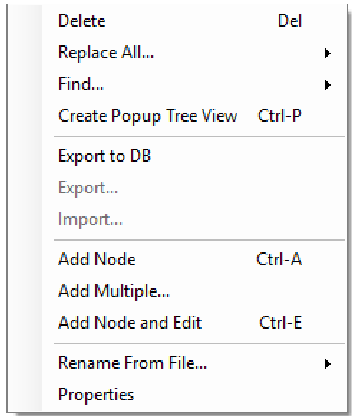


Figure 242 - Project Node Tree Context menu with *Add Multiple...*

Selecting *Add Multiple...* opens a **How many would you like to add?** dialog.

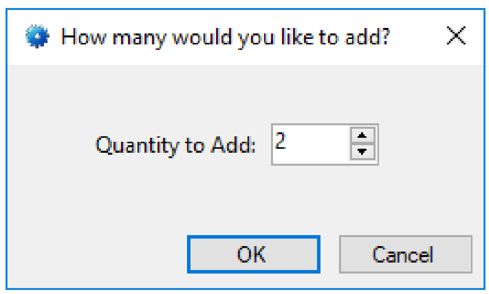
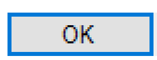


Figure 243 - How many would you like to add? dialog

Quantity to Add – The number of new nodes to add to the selected node

Set **Quantity to Add** then click 

. The desired child nodes are added to the selected node.

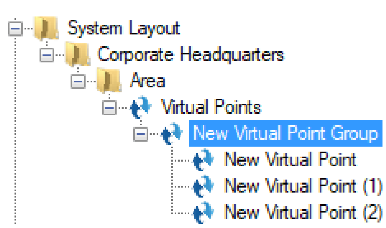


Figure 244 - Virtual Points added using *Add Multiple...*

Rename From File…

Rename From File… allows the user to rename a node's children using a text file. Selecting *Rename From File…* opens the rename side menu.

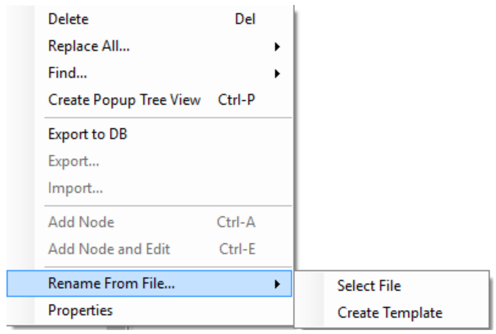


Figure 245 - *Rename From File…* side menu

The process for *Rename From File…* is:

1. Create the template file using the *Create Template* option
2. Modify the template file as needed in a simple text editor
3. Using the *Select File* option, select the modified template file

Intelli–Site Lite will rename the selected node's child nodes using the file if possible.

Note: Rename From File… is enabled for those nodes that are physical panels, software panels, and their parents. Custom Scripts can be renamed because they are software panels, but not Doors because they are not.

Alarm Queue Settings

Some nodes can manage the alarm queue settings of their child nodes. A new context menu option, *Alarm Queue Settings*, appears for those nodes.

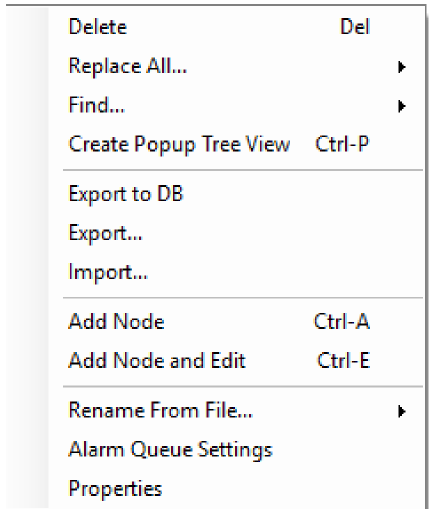


Figure 246 - The Project Node Tree context menu with *Alarm Queue Settings*

This is duplicate functionality to Replace All… I/O Point Settings but comes as a special benefit for panel type nodes and their parents.

Replicate

Suppose there are twenty points that will be monitored on the screen. The integrator takes 5 minutes to program the first screen object. The rest of the screen objects will look and behave exactly the same, the only difference is the point itself. Not only that, but the points are all siblings. Doing the math, to create all the screen objects by hand will take about (5 x 20) 100 minutes! Wouldn't it be great if there was a way to duplicate the first screen object, but specify how to customize each copy? Well, you're in luck. *Replicate* does just that.

Screen object nodes have a special context menu option all their own, *Replicate*.

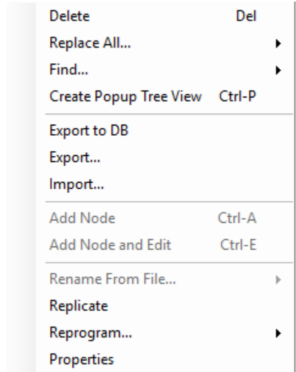


Figure 247 - The Project Node Tree context menu for a screen object

Replicate allows the automatic creation of screen objects using the selected node as the template and the starting point. It lets the user define how each copy differs from the original.

Selecting *Replicate* opens the **Replicate Object** dialog.

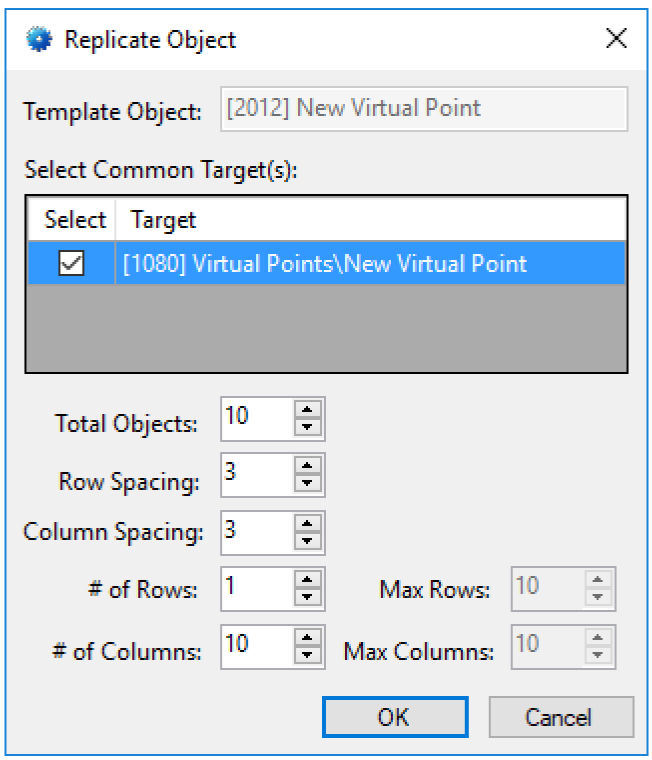


Figure 248 - Replicate Object dialog

Template Object – The selected object that will be used as the template

Select Common Targets – The list of points on the template that can be modified on each copy; the selected target serves as the starting point in the Tree. Intelli–Site Lite uses the next sibling node in the Tree as the replacement point in the copy. The figure shows the virtual point node as the selected common target. The first copy will replace the **New Virtual Point** point with the next one in the Tree which happens to be **New Virtual Point (1)**.

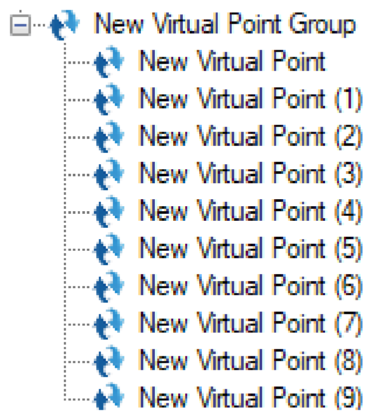


Figure 249 - The virtual point group points

Note: Sibling nodes that are in the Tree above the selected target are not included in the replication process.

Total Objects – The number of screen objects that will be created including the original object; the initial value is calculated using the selected common target(s)

Note: If multiple common targets are selected, the total objects calculated is based on the selected target with the fewest siblings left in the Tree.

Row Spacing – The number of pixels between screen objects in a row

Column Spacing – The number of pixels between screen objects in a column

# of Rows and **# of Columns –** When the screen objects are created they will be added to the screen filling in the columns of the first row, then the second row etc. ending when the total objects are added, the source is exhausted, or the limit of rows and columns is reached

Reprogram…

Consider the following. An integrator has programmed a group of screen objects to monitor the status of all the doors and windows on a floor. It took an hour to get all the objects created and aligned just right. She needs to recreate this for group of screen objects for another floor. Wouldn't it be great if she could copy the group and then reprogram them from a simple dialog? Wouldn't that save an hour of time? Yup. *Reprogram* is the answer.

A screen or a screen object can be reprogrammed. Even all its children can be reprogrammed if desired.

Reprogram has a side menu.

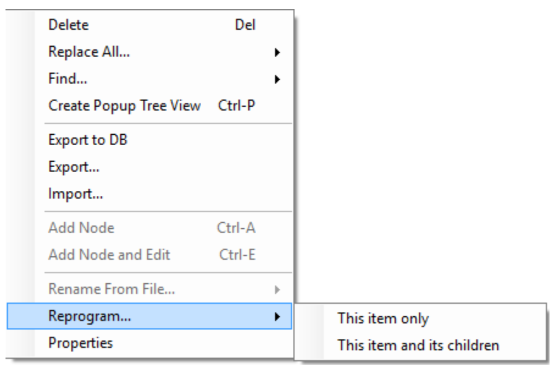


Figure 250 - *Reprogram* side menu

The only difference between the two is the information presented on the next dialog. If *This item only* is selected, only the points and strings for the target node are listed. When *This item and its children* is selected, all the child node's points and strings are listed.

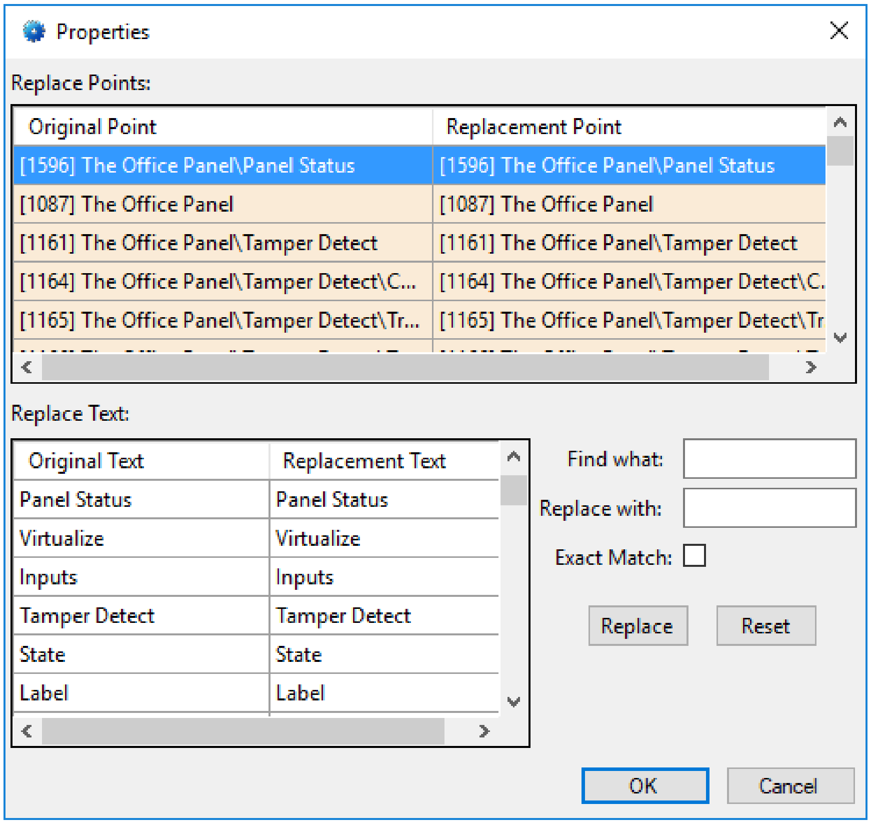


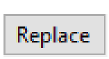
Figure 251 - *Reprogram* Properties dialog

Replace Points – Table of points found and their replacements; drag and drop the replacement points into the appropriate cell; if a replacement cell is empty, then the corresponding field or fields will be empty in the screen and screen objects themselves

Replace Text – Table of text strings found and what will be written in their place

Find what and **Replace with** – Allow the user to locate a string or part of a string in the table and replace it

Exact Match – checkbox; the search must be an exact match



- Perform the replace with the supplied text

- Return the Replace Text table to its original condition

Properties

The *Properties* option is arguably the most used context menu option. This option opens the properties dialog for the target node allowing the user to edit the settings.

Setup

The Setup node and its child nodes define and configure the environment in which the Intelli–Site project exists.

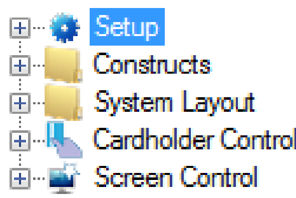


Figure 254 - The Setup node

Setup Properties Dialog

Right-click on the Setup node and select *Properties* to open the properties dialog.

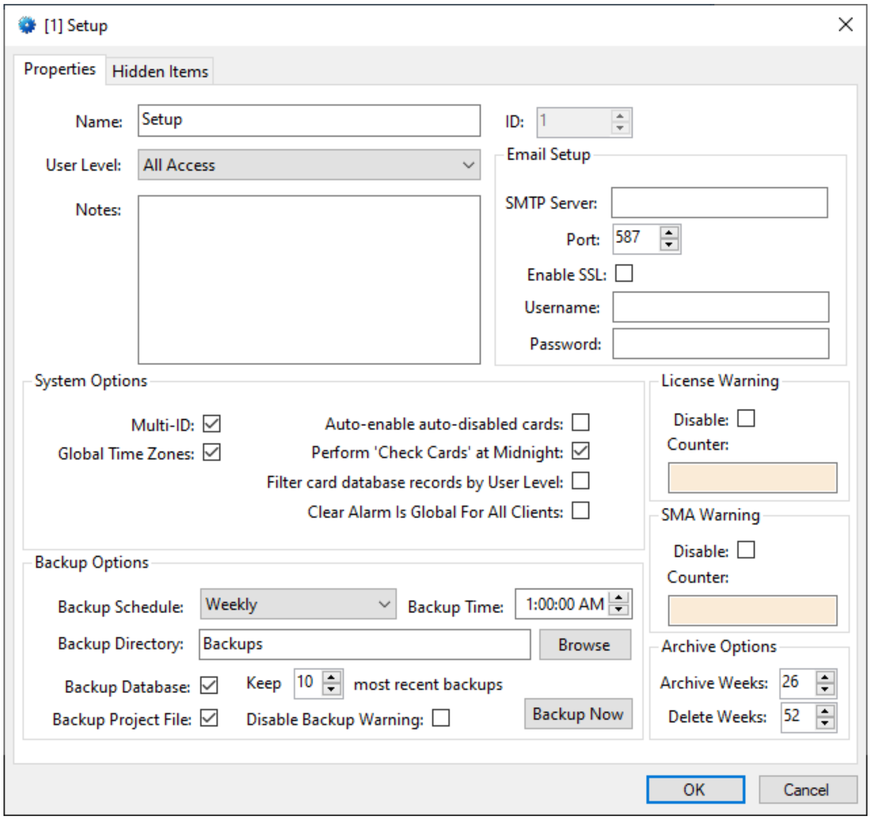


Figure 255 - Setup properties dialog

There are two tabs: the ***Properties*** tab and the ***Hidden Items*** tab.

Setup Properties tab

The Setup node contains the basic properties **Name**, **ID**, **User Level**, and **Notes**. The rest of the fields are grouped in boxes based on functionality. The following sections detail the properties specific to the Setup node.

System Options

The **System Options** are those properties that affect the way Intelli–Site Lite goes about doing its business.

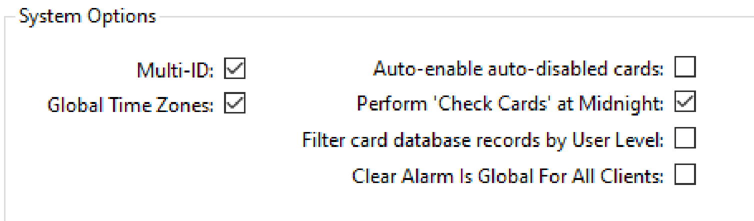


Figure 256 - Setup properties: System Options

Multi-ID – checked by default, controls whether or not a single person may have more than one token assigned. When checked, Intelli–Site Lite is in Multi-ID mode. The number of tokens that can be assigned to a person is unlimited. When cleared, Intelli–Site Lite is in Single ID mode. The personnel to tokens ratio is 1:1. In Single ID mode, the personnel and token tables are combined into a single table in **Access Management View**.

Global Time Zones – checked by default; controls whether the time zones are global or panel specific. When checked, there is only one set of time zones. When clear, each panel will have its own set of time zones that must be managed individually. One reason a system may need to clear the **Global Time Zones** checkbox is that large systems may exceed a panel's limit of allowed time zones.

Auto-enable auto-disabled cards – clear by default; enables cards at midnight that were automatically disabled by the Engine the previous day. For example, Software Giants, LLC has a set of cards of type 'Visitor'. When the visitors leave, their visitor badges are scanned at a reader at the checkout counter. These badges are disabled so they cannot be used again that day. But these same badged will be issued the next morning to a whole new set of visitors. With **Auto-enable auto-disabled cards** checked, these Visitor badges will be enabled automatically and ready for use in the morning.

Perform 'Check Cards' at Midnight – checked by default; when checked, the 'Check Cards' function will run at midnight. The 'Check Cards' function causes any card record-related changes (card expirations, activations, etc.) to download to the appropriate panels at midnight.

Filter card database records by User Level – clear by default; allows segregated access to the database records based on the User Level assigned to the user. When checked, the records displayed in **Access Management View** will be filtered by User Level. The user will only be able to see and modify records that are included in their User Mask. Any records added are given the User Level of the logged in user. For example, Intelli–Site Lite is managing an entire school district. User Levels can be set so that the administrator of Elementary School 234 only sees records for Elementary School 234 even though the database contains records for the entire school district.

Clear Alarm Is Global For All Clients – clear by default; when an event is the Alarm Queue is cleared, it is only removed from the Client where it is cleared unless this checkbox is checked. When checked, an event cleared by one Client is cleared for all Clients.

Backup Options

Backing up the Intelli–Site Lite database and project files is important. It is so important; Intelli–Site Lite will continue to warn that backups have not been configured until they have been setup or until the warning dialog is disabled. The **Backup Options** control when, where, and how Intelli–Site Lite backups are done.

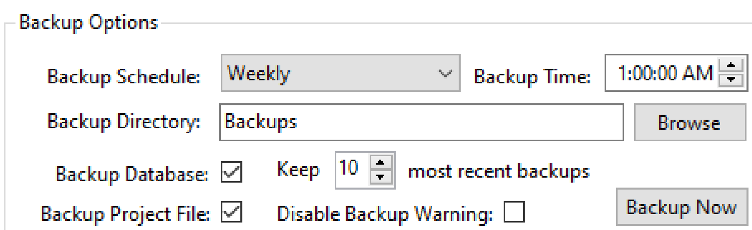


Figure 257 - Setup properties: Backup Options

Backup Schedule – drop-down list (default *Weekly*); controls how often backups are performed; containing *Daily, Weekly, Monthly*

Backup Time – time (default 1:00:00 AM); the time the backup begins

Backup Directory – text; where the backup files are stored; (default ***ProgramData\OSSI\Intelli–Site\Backups***);

Note: For maximum safety and security, the backup location should be on a different computer or an external device.

Browse - button; it opens a **Browse For Folder** dialog which allows the user to set the backup directory

Backup Database – checkbox (default checked); include the database in the backup

Keep – number (default 10); the number of backup files to keep; when Intelli–Site begins the backup, it checks the number of backup files there are. If the new backup is greater than the **Keep** number, the oldest backup is deleted. It then executes the backup.

Backup Project File – checkbox (default checked); include the project file in the backup

Disable Backup Warning – checkbox; a warning dialog appears every time a user logs in if Intelli–Site detects that backups have not been configured. If every field in the **Backup Options** group is set to the default value, Intelli–Site assumes backup has not been configured. If the default values are the desired values, check this option.

Backup Now - button; initiate a backup when clicked using the saved **Backup Options**; if changes have been made but not saved, the user receives a message dialog requiring a save before the backup can proceed

Email Setup

Email Setup defines the needed information for email notification.

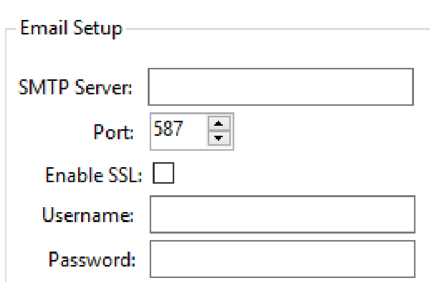


Figure 258 - Setup properties: Email Setup

SMTP Server – The email server

Port – The port number on which to connect to the email server.

Enable SSL – Check this field if the email server requires SSL.

Username – The username for the email server

Password – The password that goes with the above username for the email server.

Note: Your IT personnel will know the correct values for these fields.

License Warning and SMA Warning

License Warning and SMA Warning can be disabled just like backup warning. Although, there needs to be a way to inform someone that they have expired or are about to expire.

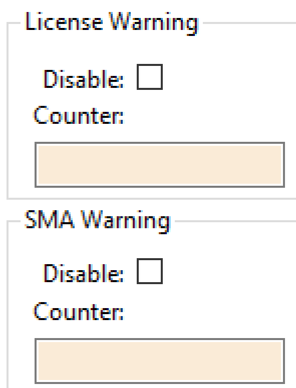


Figure 259 – Setup Properties: Disable License Warning and Disable SMA Warning

Since these properties are the same for both warning types and act exactly the same, these properties will be described together.

Disable – checkbox; a warning dialog appears every time a user logs in if the license or SMA is expired unless this box is checked.

Counter – drop box; accepts only counter values; the software writes the number of days until the license or SMA expires here. This allows the integrator to program notification that doesn't require a pop up on login.

Archive Options

The purpose of archiving is to prevent the database from becoming too large.

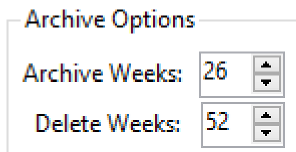


Figure 260 - Setup Properties: Archive Options

Archive Weeks – numeric (default: 26); when data is older than the value set for **Archive Weeks**, it is archived and stored in the **Backup Directory**.

Delete Weeks – numeric (default: 52); when the data stored in the archives is older than **Delete Weeks**, it is deleted.

Note: Once data is archived, it is no longer directly accessible from Intelli–Site. Contact tech support if you need access to it.

Setup Hidden Items tab

Not every Intelli–Site project needs every Intelli–Site option. Sometimes it's hard to see the forest through the trees. If an action or a Tree node is not necessary for the project, hiding the action or node may make managing the project easier as well as safer. If there are no cameras in the project, hide the camera actions. Not going to have any Routing Levels or Masks? Hide those nodes.

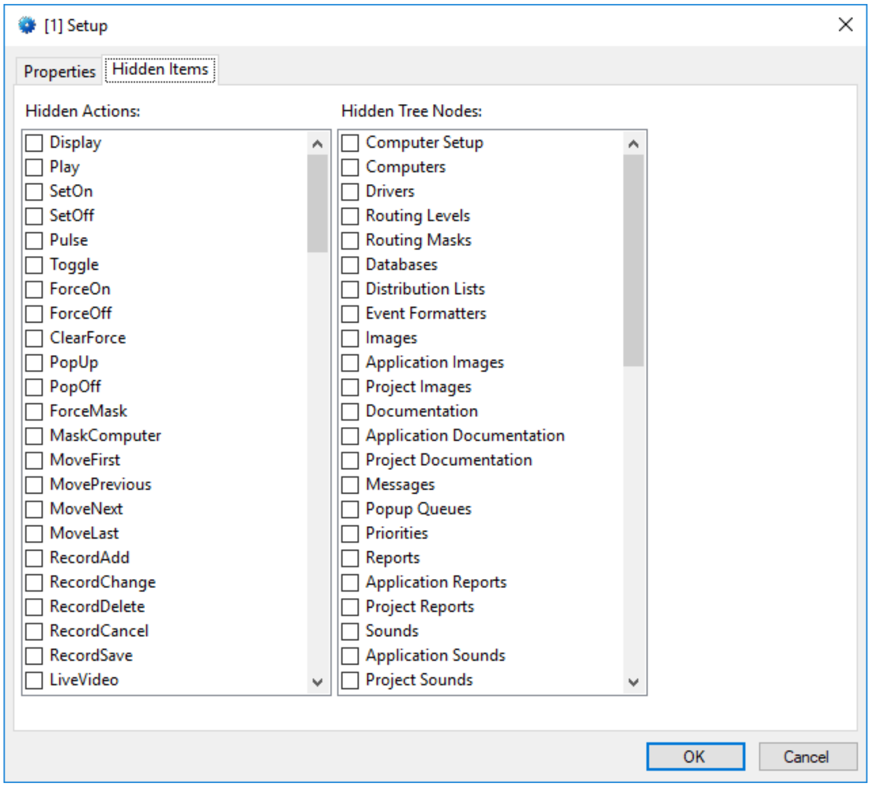


Figure 261 - Setup Properties: Hidden Items tab

Computer Setup

Computer Setup contains child nodes that are specific to the different functions that are assigned to a computer.

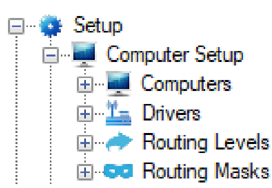


Figure 262 – Computer Setup

Computers

This node holds all the Computer nodes. There must be a Computer node for each computer or device that will communicate with the Engine. This means that for every computer that will have a Driver Service or Desktop Client installed on it there must be a corresponding Computer node in the Project. If a computer or handheld device is going to connect to the Engine via a browser, there must be a Computer node for that device as well.

To add a Computer node, right-click on the **Computers** node and select *Add Node* or *Add Node and Edit*.

A Computer node has the standard properties of **Name**, **ID**, **User Level**, and **Notes**.

Note: The Name must match the name of the computer or device. If it doesn't, no connections will be allowed. Name is not case-sensitive. The log files will note the name of the device on a failed connection attempt.

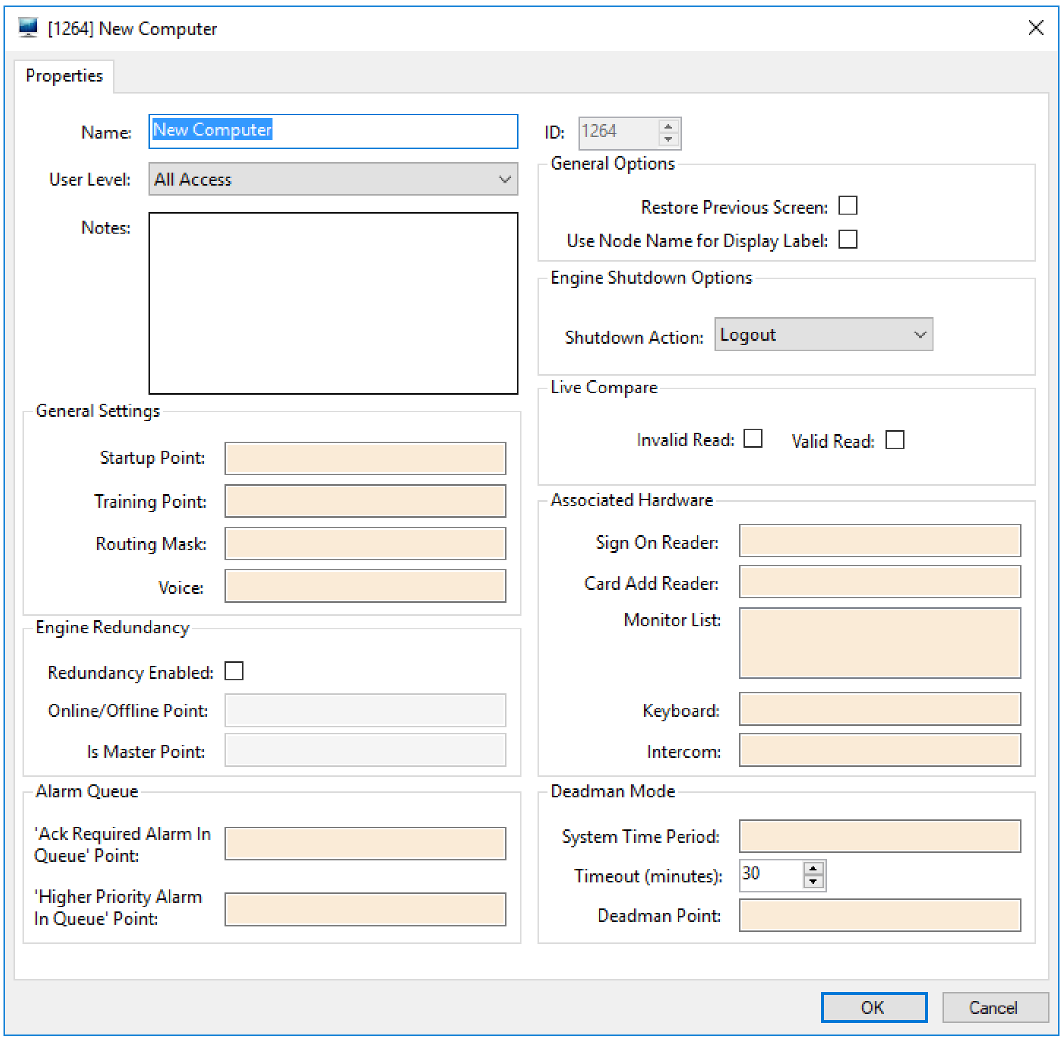
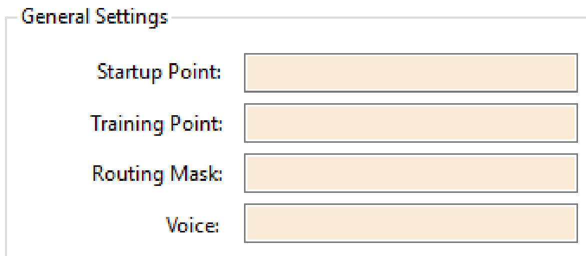


Figure 263 - Computer Node Properties dialog

General Settings

The **General Settings** group box fields provide general information about this computer.



Startup Point – This point is set high when a Client logs in from this computer, this point is set low when the last Client logs off or is disconnected

Training Point – When this I/O Point is set high, the Desktop Client on this computer will enter Training Mode. All I'O Points in the system will be given a Training State

- ***Training Queue****:* *The Engine and Client will maintain a new alarm queue, the Training Queue.*
- ****Auto-Exiting Training Mode:**** *If an alarm comes into the real alarm queue for the Client, Training Mode will be automatically exited.*

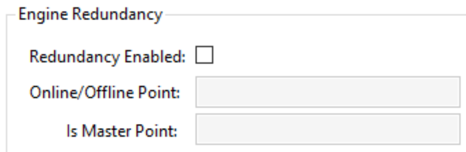
Routing Mask – This point lists the Routing Levels that the computer receives. For more information, see Routing Masks and Routing Levels.

Voice – The voice Intelli–Site Lite will use when it speaks unless the user has one assigned to him

Engine Redundancy

Engine Redundancy allows multiple Engines to be running with one Master Engine and all the others are Slaves. If the Master Engine fails, one of the Slave Engines will step forward to take on the role of Master. Since everything done by the Master Engine is synchronized to the Slave Engines, you gain fault tolerance with this optional module.

The Engine Redundancy properties enable redundancy on this computer and provide points to monitor the state of redundancy for the computer.



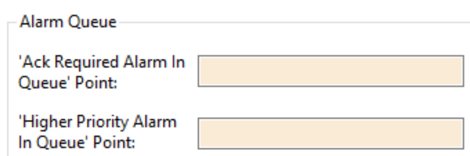
Redundancy Enabled – When checked, this computer is part of the redundancy network, an Engine should be installed here

Online/Offline Point – This point will be set high when the Engine on this computer is online, it will be set low when the Engine is offline

Is Master Point – This point will be set high when the Engine on this computer is the Master Engine, it will be set low when it is not.

Alarm Queue

The Alarm Queue properties are points that will be set under specific conditions associated with the Alarm Queue.



'Ack Required Alarm in Queue' Point – This point will be set when there is an Ack Required Alarm in the queue.

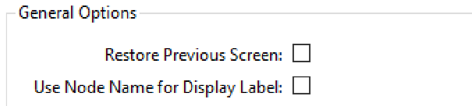
Note: An Ack Required Alarm is an alarm that must be acknowledged. This is determined by the Acknowledge Required property on the point's Operation ***tab.***

'Higher Priority Alarm In Queue' Point – This point will be set when an Ack Required Alarm comes in with a priority higher than the selected alarm in the queue.

Note: The first alarm that enters the queue is selected but the actions in the On Selection grid are not executed.

General Options

The General Options are about handling screens and display labels.

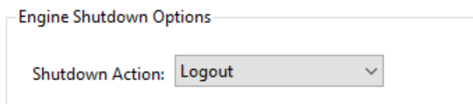


Restore Previous Screen – When checked, the Client will return to the previous screen after an alarm or event has been processed

Use Node Name for Display Label – When checked, the **Name** of the screen object will display rather than its value

Engine Shutdown Option

If the Engine is stopped or if the Client loses its connection to the Engine, what should the Client do?



Shutdown Action – Drop-down list of the available options when the Engine is shut down (stopped) or the Client loses connection to it.

- *Exit* – The user is logged out and the Desktop Client is exited.
- *Logout* – The user is logged out but the Desktop Client continues to run
- *AutoRetry* – The Desktop Client attempts to reconnect

Live Compare

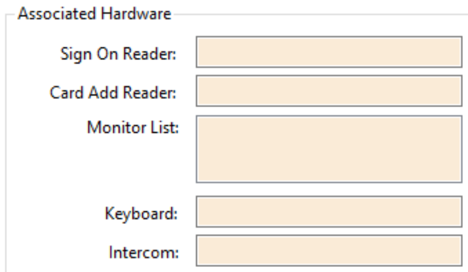
Live Compare is a function that performs a comparison with the database to locate a personnel photo that matches the current camera view. The Client user can at that time decide to permit or deny access to that user.

Invalid Read – Prompt the user to perform a Live Compare when an invalid card is read

Valid Read – Prompt the user to perform a Live Compare when a valid card is read

Associated Hardware

This group of properties defines the hardware associated with this Computer node.



Sign On Reader – Allows a card to be presented to this access control reader. The user for which the card is designated as the **Logon Card** is logged in. See the **Logon Card** field in the User node General Options.

Card Add Reader – Allows a card to be present to the specified access control reader and will automatically enter the card into the database if it isn’t already in it. If the card does exist in the database, it will locate the record and display it. The user must be in **Access Management View** at the time the card is read.

Note: If a card is presented to the Card Add Reader while a personnel record is currently being edited, the card will be added to this personnel instead of adding a new personnel record.

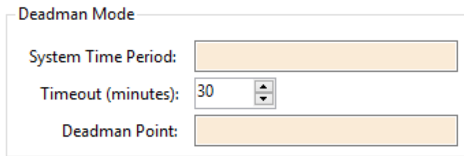
Monitor List – the monitor I/O Points of the computer

Keyboard – the keyboard I/O Point of the computer

Intercom – the Intercom I/O Point of the computer

Deadman Mode

This group of properties is all properties associated with Deadman Mode. Deadman Mode is defined as a Client session on a computer being idle for too long during a specific system time period.



System Time Period – The system time period that is the control point for Deadman Mode

Timeout (minutes) – Number of minutes before a logged in Client (computer) enters Deadman Mode

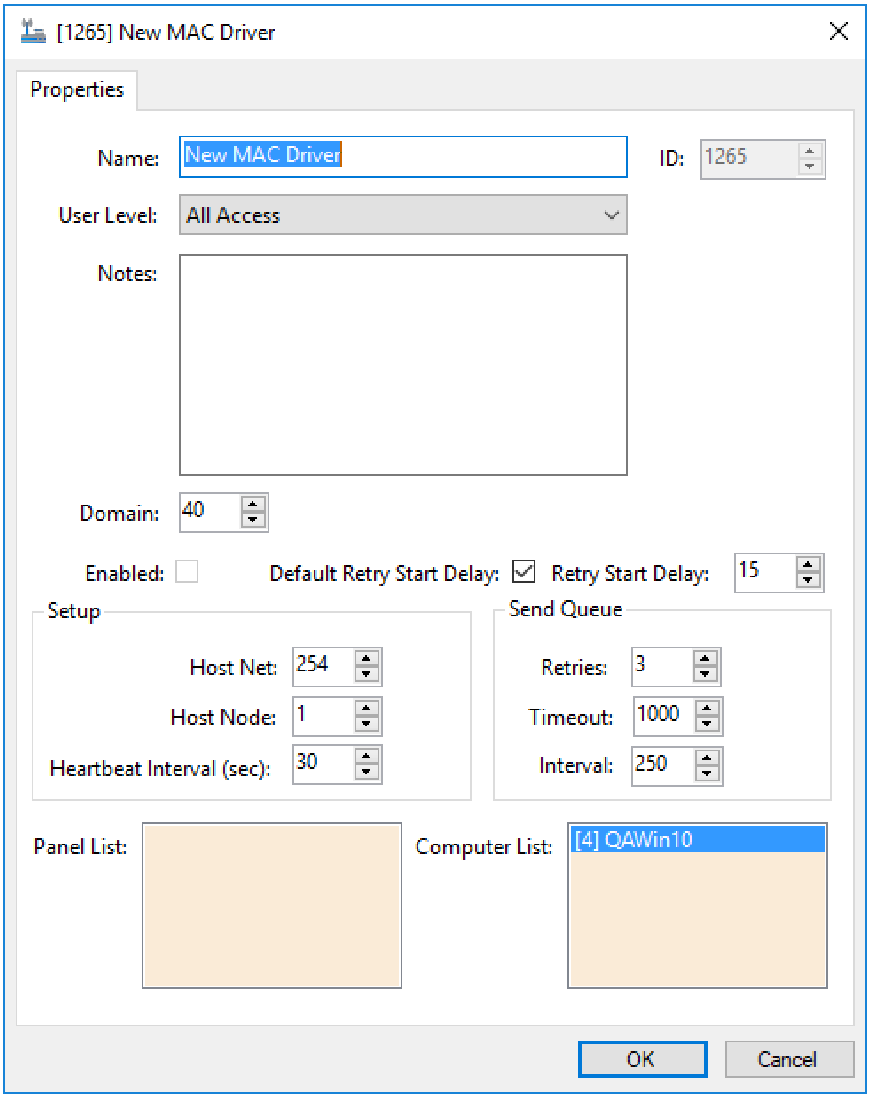
Deadman Point – This point is set when Deadman Mode is entered

Drivers

The Drivers node is the parent node for all the drivers in the Intelli–Site system and their communication methods. The **Hardware Management View** manages these nodes.

Driver

The Driver node contains the properties needed to identify the driver, define which computer in the Intelli–Site system on which the Driver will run, and which panel nodes will be controlled by this Driver. These properties also define the characteristics and behavior of the driver. The exact properties that are present differ depending on the type of driver it is. For the specific properties and their definitions, see the appropriate Panel Guide.



Of course, the basic properties, **Name**, **ID**, **User Level**, and **Notes**, are part of the total properties. The following are the properties common to many drivers.

Enabled – When checked, this driver is enabled; this driver will connect to the Driver Service and communication with the panel(s) in the **Panel List** will begin

Default Retry Start Delay - When a driver loses connection with a field device that is normally polled, its default condition is to increment the retry delay (to keep from continuously retrying a lost connection). If this checkbox is selected, the retry delay will not increment, so the reconnection attempts will be continuous at the **Retry Start Delay**.

Retry Start Delay – How long to wait in seconds before attempting to reconnect to a field device

Panel List – The list of panels, also known as field devices, which will be controlled by this driver; though the name of the property may vary, all drivers will have a property that lists the field devices

Computer List – The list of computers on which this driver will be found

Communication Method

Most drivers will need to know specific information on how to communicate with the physical device. What is needed is different depending on the specific driver. It could be as simple as IP address and Port number or it can be a whole host of parameters. See the Panel Guide for specific information on the Communication Method, if any, needed by that panel.

Routing Levels

In section Options Tab we explained that every I/O Point has a **Routing Level** field. This is where those levels are defined.

Note: The Routing Level field is disabled until Panel Will Transmit is checked.

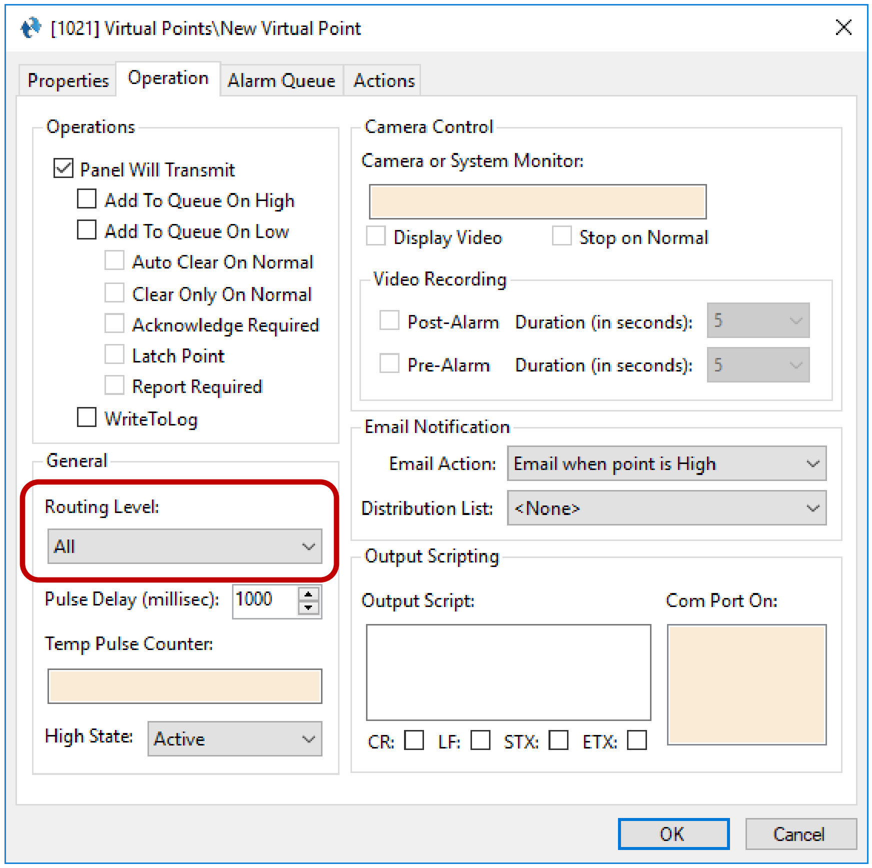


Figure 264 - Routing Level on the Operation tab

A routing level is basically an access entry for a computer. For a computer to receive a point's activity and alarm updates it must be have access to that point; it must be assigned the points routing level.

The possible routing levels in Intelli–Site Lite are defined here. Intelli–Site Lite ships with one Routing Level, **Level 1**. The default value for the **Routing Level** field, *All*, is not an actual routing level node.

Note: The default value, All, is not a Routing Level node to protect it from begin modified or deleted.

To add a **Routing Level**, right-click on the **Routing Levels** node and select *Add Node* or *Add Node and Edit*. There are only the basic properties on the **Routing Level** node.

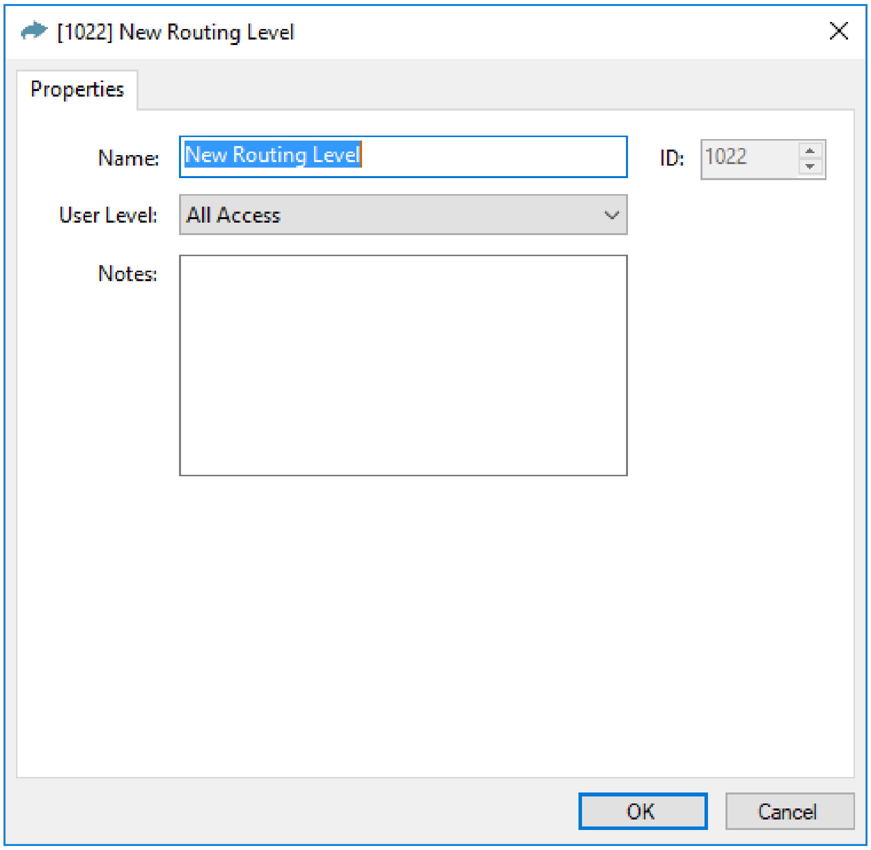


Figure 265 - Routing Level properties dialog

Note: It is ironically possible to change the routing level and make it impossible for you to see the point's activity or alarms on any computer. Care should be taken when changing Routing Levels and Routing Masks.

Routing Masks

Routing Masks are access sets for computers. A routing mask contains a list of routing levels that are considered members of the routing mask. If a computer has a routing mask, it will only receive updates for points whose routing level is included in the computer's routing mask.

A routing mask is assigned to a computer if that computer should only receive a subset of the activity controlled by Intelli–Site Lite. For example, Intelli–Site Lite is controlling an office building with many businesses. Each business has its own security personnel that manage their access. They should only receive the activity pertinent to their business. Therefore, routing levels and masks must be added to Intelli–Site Lite to control this. The routing levels are assigned to points and routing masks are assigned to computers.

A routing mask is assigned in the **Routing Mask** field of the computer node properties. See Computers.

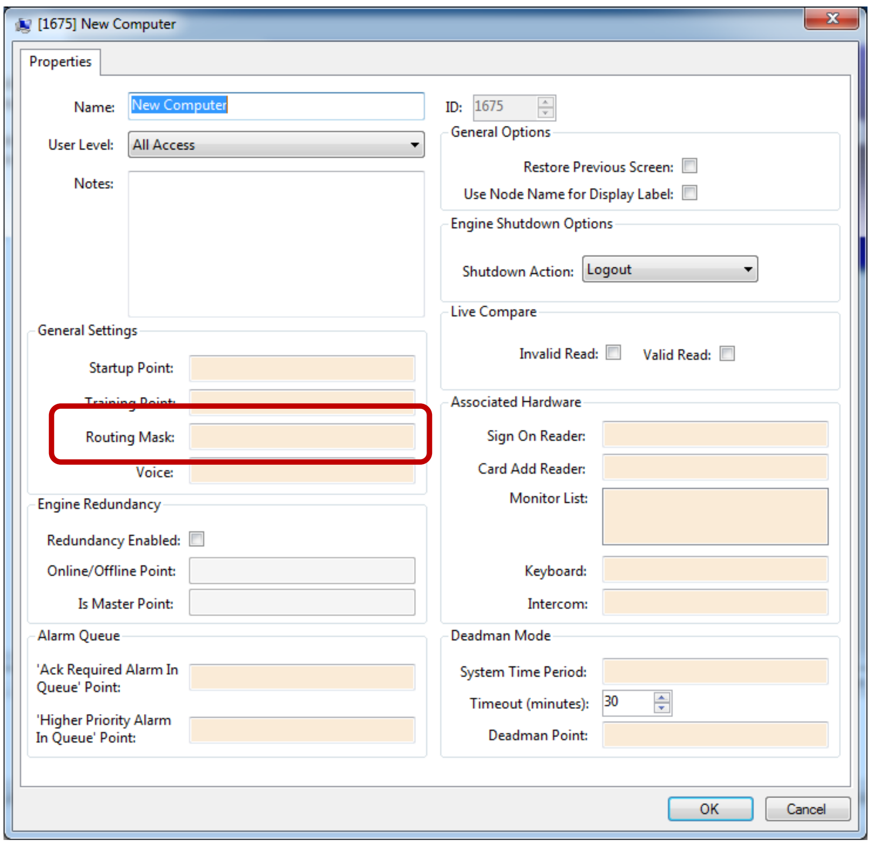


Figure 266 - Routing Mask field of the Computer properties dialog

Intelli–Site Lite ships with a single routing mask called **Default**. It is just a sample routing mask. It isn't the system default. The true default routing mask is blank. When a routing mask is not specifically assigned, the computer will receive all state changes and alarms.

To add a **Routing Mask**, right-click on the **Routing Masks** node and select *Add Node* or *Add Node and Edit*.

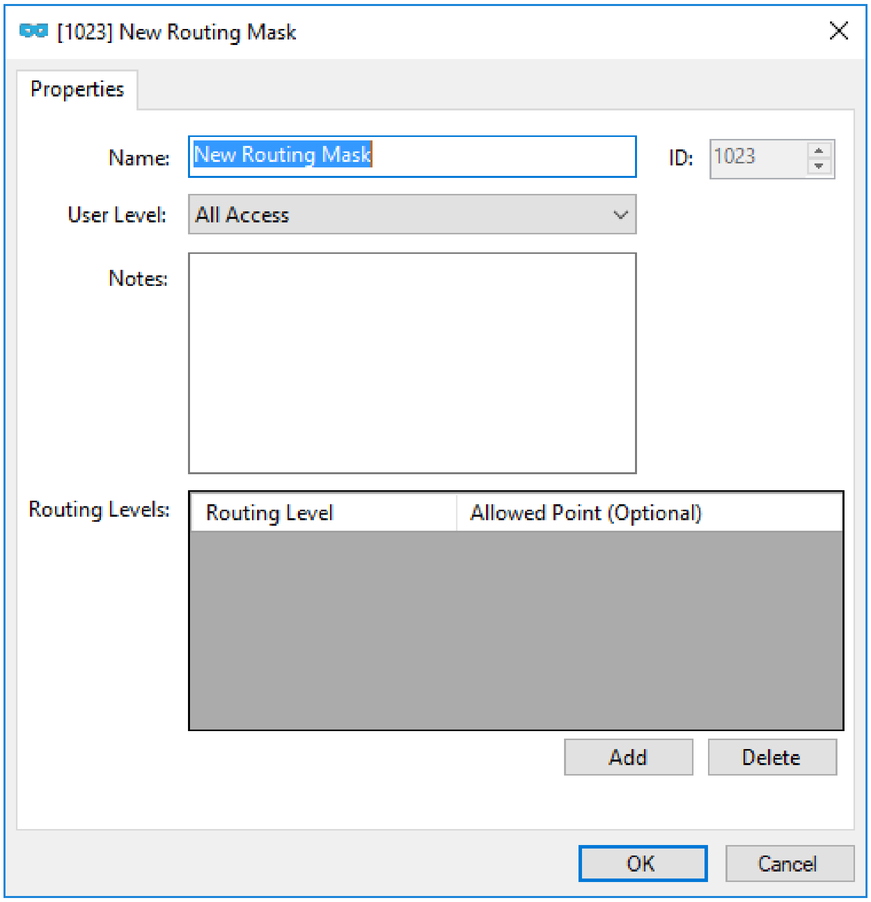


Figure 267 - Routing Mask properties dialog

In addition to the basic properties on the **Routing Mask** node, there is the **Routing Levels** table.

Routing Levels – table; the routing levels that are assigned to this routing mask

> **Routing Level** – drop-down list of the available routing level nodes; the selected routing level is assigned to this mask

Allowed Point (Optional) – optional, drop box; accepts I/O Points; when the I/O Point is high, this routing level is included in the routing mask; when the point is low, the routing level is not included; when this field is empty, the routing level is always included in the mask.

- button; add a row to the **Routing Levels** table

- button; delete the selected row form the **Routing Levels** table

---

Note: It is ironically possible to change the routing mask and make it impossible for you to see the point's activity or alarms on any computer. Care should be taken when changing Routing Levels and Routing Masks.

Databases

The Databases node contains the Database node which provides access to the Project database for project programming.

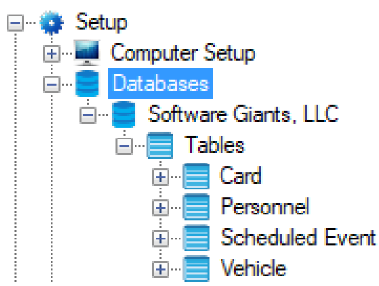


Figure 268 - Databases

To see the properties of the Database node, expand the Databases node and right-click on its child node. The name of this node is the same as the name of the Project. Select *Properties* from the context menu.

Note: Database node changes should be made using the Configuration Utility and not in the Client.

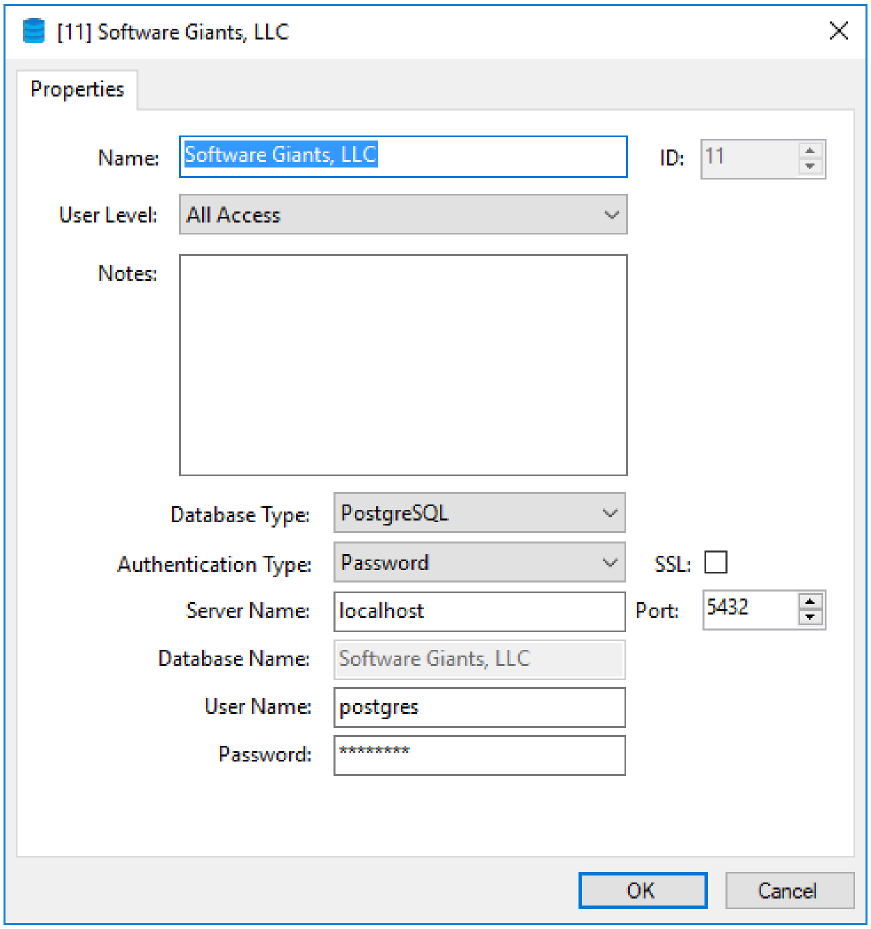


Figure 269 - Database Properties dialog

A Database node has the standard properties of **Name**, **ID**, **User Level**, and **Notes**.

Database Type – The type of database this project uses; currently only PostgreSQL is supported

Authentication Type – The method of authentication the Engine will use to connect to the database

SSL – checkbox; when checked SSL is used when authenticating

Server Name – Then name of the computer on which the database resides

Port – The TCP/IP port number with which to connect to the database

Database Name – The name of the database; this is the name of the project and cannot be changed here. To change the name of the project, use the Configuration Utility.

User Name – The user name credential for database authentication

Password – The password credential for database authentication

Below the database node are the database tables which allows the user to see what fields are available for Project programming.

Database Table

The database contains several database tables. Each table is represented by a database table node.

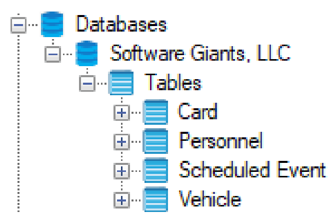


Figure 270 - Database Tables

Card – data associated with specific card

Personnel – data about each personnel

Scheduled Event – scheduled event data

Vehicle – vehicle data

Database Field

Each field in the database appears as a node under a table node. A database field node has the standard properties of **Name**, **ID**, **User Level**, and **Notes**. None of the properties is editable except for **Name** and **Notes.**

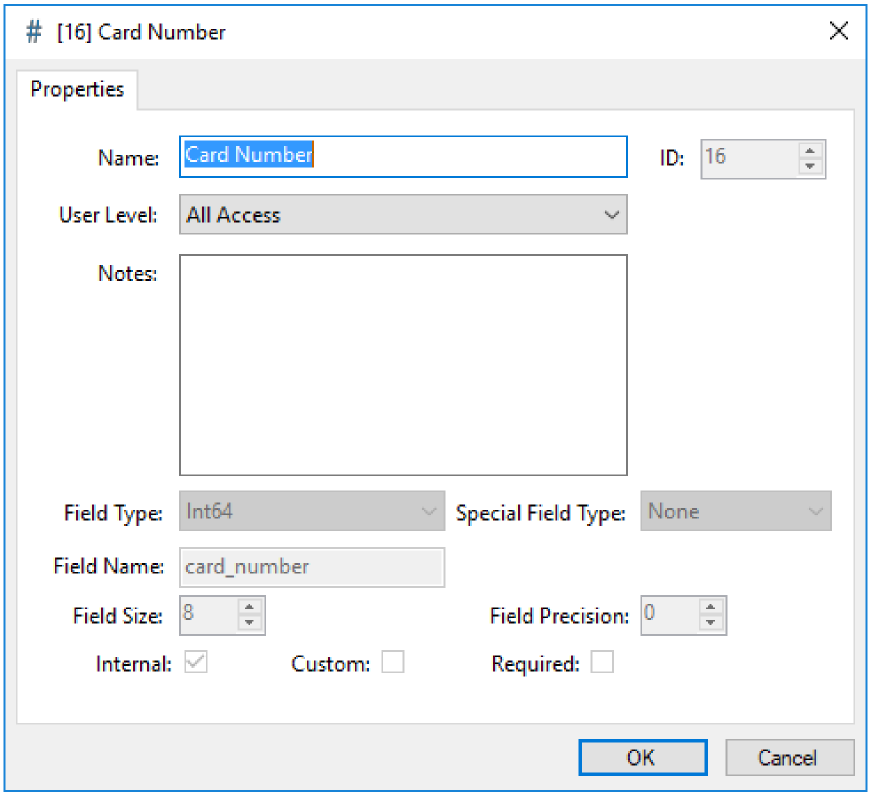


Figure 271 - Database Field properties dialog

Field Type – The data type of the field

Special Field Type – A modifier for the **Field Type**

Field Size – The number of bytes in the field

Internal – checkbox; when checked it is an internal field

It's important to know the **Name** and the **Field Type** for importing cards. The **Field Name** can be used instead of the **Name**.

Documentation

The Documentation node contains the nodes that tell the software the location of the documentation files. The documents are readable in **Documentation View**.

Note: ***All Intelli–Site Lite manuals are PDF files. Therefore, a PDF reader must be installed on the computer on which the manuals are to be viewed. If there is not a PDF reader on the computer, an "error loading webpage" message displays in the Document Viewing Area.***

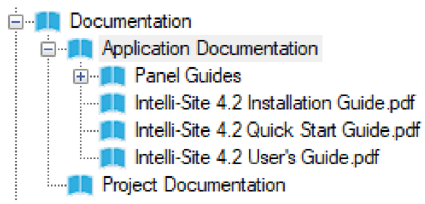


Figure 273 - Documentation

The documentation is separated into two groups.

Application Documentation – The documents pertaining to Intelli–Site Lite; includes the Intelli–Site Lite User's Guide and the Panel Guides for the installed drivers

Project Documentation – The documents specific to the project created by the integrator; the integrator is strongly encouraged to provide a user's manual for the project.

Before a document can be added, a group node must be added to the Project Documentation node.

Project Documentation Group

A document node must be added to a Project Documentation group node.

To add a project documentation group node, right-click on Project Documentation and select either *Add Node* or *Add Node and Edit*. An **Enter Directory Name** dialog appears.

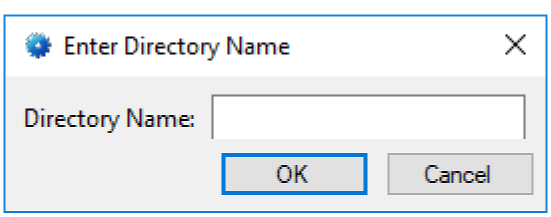


Figure 274 - Enter Directory Name dialog

Intelli–Site Lite will create a directory in the project folder to hold the document. This folder corresponds to the project documentation group node. Enter the name of the folder.

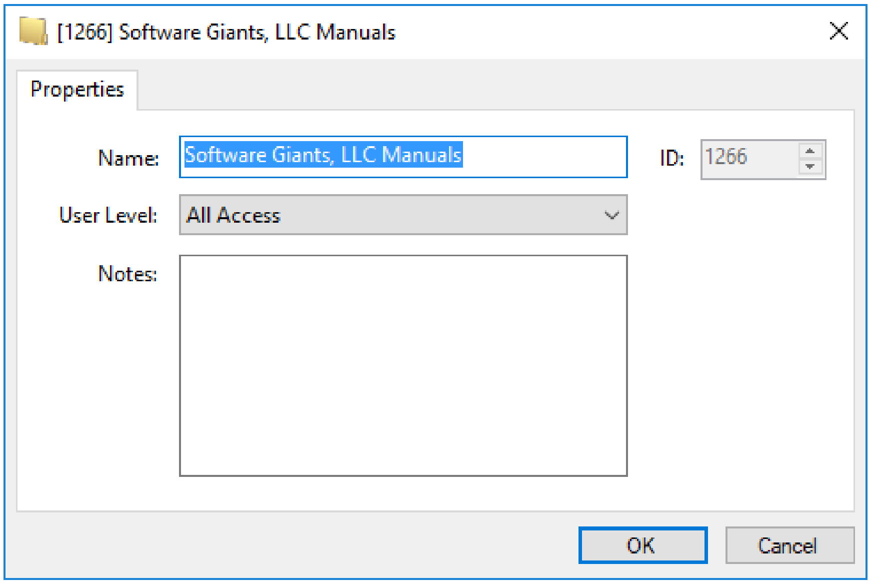


Figure 275 – Project Documentation Group properties dialog

Document

Once the project documentation group node has been added to the Tree, a document can be added.

Right-click on the project documentation group node and select either *Add Node* or *Add Node and Edit*. A Windows **Open** dialog appears allowing you to select the PDF file.

A new document node is added to the Project Tree.

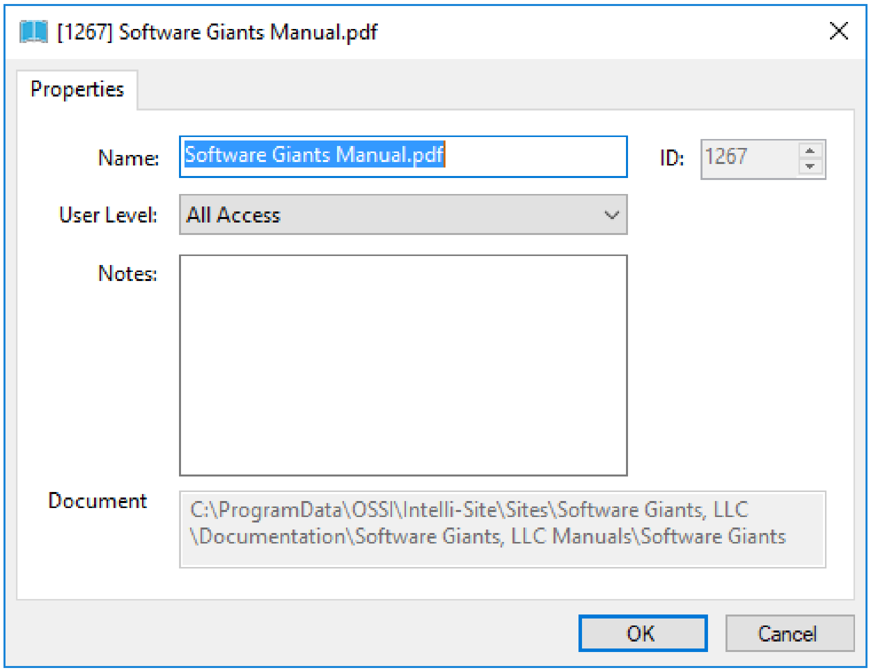


Figure 276 - Document properties dialog

Document – This field displays the actual location of the document on disk. Notice that this project document is in the Documentation\Software Giants, LLC Manuals subfolder of the Project. Software Giants, LLC Manuals is the name of the directory and the node in which the actual document resides. The PDF file is copied into this folder.

The basic properties common to all nodes, **Name**, **ID**, **User Level**, and **Notes** are here. The following explains the rest of the properties.

Termination – drop-down list; *Carriage Return/Line Feed* (default), *Carriage Return*, *Line Feed*, *TAP*, and *None*; what to end the formatted text string with

Send Formatted Event To File – group box; the properties needed to define the file to write the formatted text

1. Single Local Location: ***C:\Logfiles\MyLog.txt***
2. Single Network Location: ***\\Server1\LogFiles\MyLog.txt***
3. Multiple Network Locations: ***\\[Department]\LogFiles\MyLog.txt***

4. Multiple Files in Single Network Location: ***\\Server1\[Department]\LogFiles\MyLog.txt***
5. Multiple Files in Single Network Location with Dated File Names: ***\\Server1\[Department]\LogFiles\%Y-%m-%d.txt***

Send Formatted Event To TCP/IP – group box; the properties needed to define the IP address and port to write the formatted text

Images

The Images node contains the nodes that tell Intelli–Site Lite where the image files are.

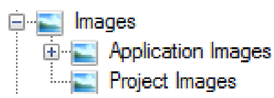


Figure 279 - Images

The images are separated into two groups.

Application Images – The images Intelli–Site provides

Project Images – Some installations may need additional images. This is where they will be added to the project

Before an image file can be added, a group node has to be added to the Project Images node.

Project Images Group

An image node has to be added to a Project Images group node.

To add a project images group node, right-click on Project Images and select either *Add Node* or *Add Node and Edit*. An **Enter Directory Name** dialog appears.

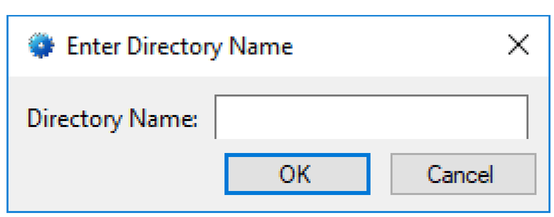


Figure 280 - Enter Directory Name dialog

Intelli–Site Lite will create a directory in the project folder to hold the image file. This folder corresponds to the project images group node. Enter the name of the folder.

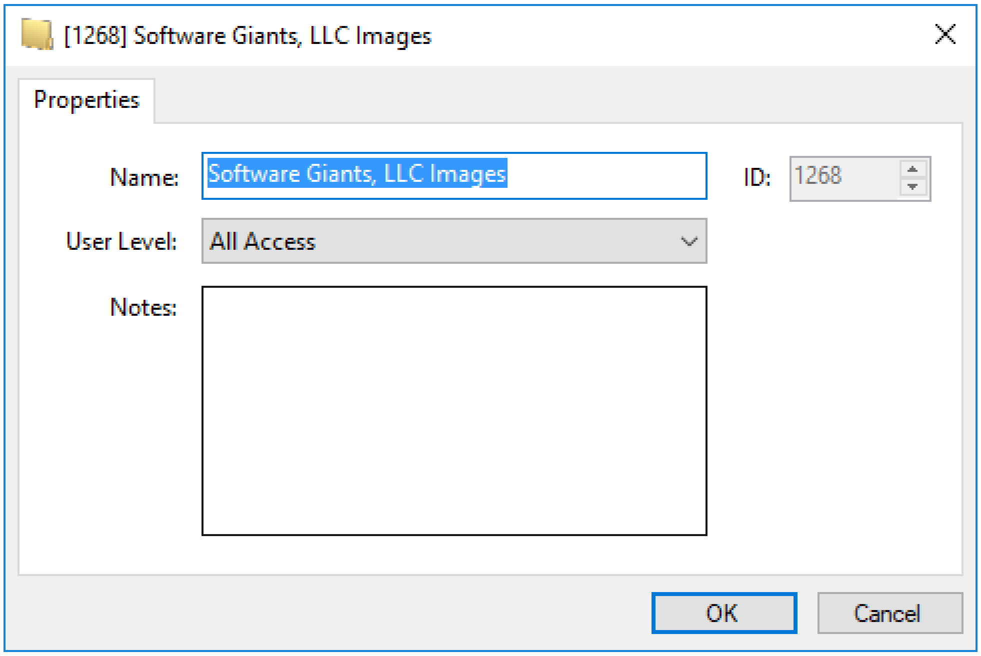


Figure 281 – Project Images Group properties dialog

Image

Once the project images group node has been added to the Tree, an image can be added. Intelli–Site supports the following image types:

- *.png
- *.jpg
- *.gif
- *.tif
- *.tiff
- *.bmp
- *.wmf

Right-click on the project image group node and select either *Add Node* or *Add Node and Edit*. A Windows **Open** dialog appears allowing you to select the Image File file.

A new image node is added to the Project Tree.

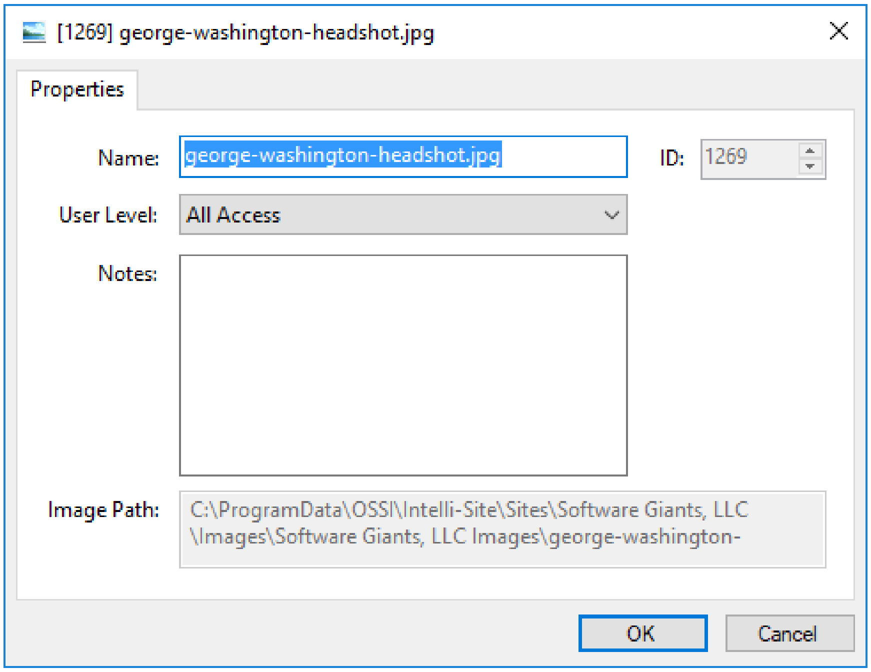


Figure 282 - Image properties dialog

Image Path – This field displays the actual location of the image on disk. Notice that this project image is in the Image\Software Giants, LLC Images subfolder of the Project. Software Giants, LLC Images is the name of the directory and the node in which the actual image file resides. The image file is copied into this folder.

Image Preview

To preview an image in **Design View**, place the mouse on the image node. Hold the mouse button down until the image preview appears.

Priorities

The **Priorities** node contains the priorities associated to the Project. The priorities establish a hierarchy of alarms that are displayed within the Information Manager (IM) ***Queue Control***. Alarms of the highest priority are displayed first followed by alarms of lower priority. Colors, messages and sounds can be defined for each priority to expedite the user's awareness of alarms.

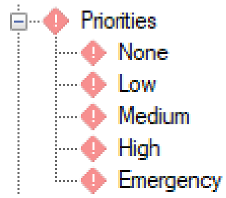


Figure 285 - Priorities

Intelli–Site Lite provides five (5) priorities by default. They are None, Low, Medium, High, and Emergency. You are welcome to modify or delete them or even add your own priorities. Priority is determined by the order of the nodes in the Tree. The priority at the bottom of the list, in this case Emergency, has the highest priority. The priority None has the lowest. Their order can be changed using Ctrl+drag-and-drop. Hold down the Ctrl key, click and hold down the mouse button on a priority node, drag the priority node and drop it on the Priorities node releasing the Ctrl key. The priority node is now the highest priority node.

All the priority nodes found under the Priorities node are the values for the **Priority** property on the ***Alarm Queue*** tab of all I/O Points.

Note: Accutech View and the Accutech panel require these priorities. Do not delete them if the installation uses Accutech panels.

An existing priority is edited using the *Properties* option of the context menu. A priority node added using *Add Node* or *Add Node and Edit*.

A priority node has the standard properties of **Name**, **ID**, **User Level**, and **Notes**.

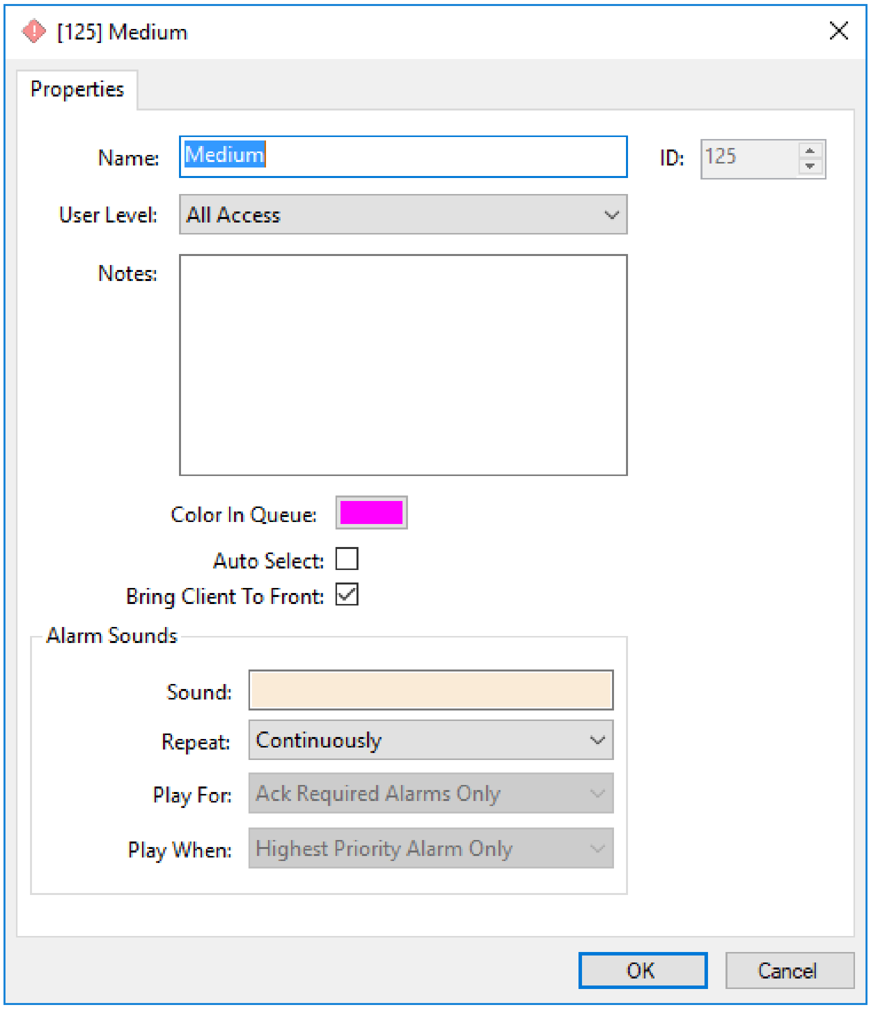


Figure 286 - Priority properties dialog

Color in Queue – color selector; the color used when the event is written to the queue; clicking on this field opens the **Color** dialog allowing the user to select the desired color for this priority

Auto Select – checkbox; when an event is added to the queue with this priority, it is automatically selected. When it is selected, the actions in the **On Queue Selection** action grid are executed.

Bring Client to Front – checkbox; when an event of this priority is added to the queue, bring the Client to the front of all other applications that may be running on the host computer

Alarm Sounds - group box

Sound – drop box; the sound to play when an alarm of this priority is written to the alarm queue assuming the desired conditions are met

Repeat – drop-down list; *Continuously, Once, Once Each Occurrence*

- *Continuously* - the sound plays every three seconds until the alarm is acknowledged or cleared;
- *Once* - the sound plays once until the alarm is cleared from the queue
- *Once Each Occurrence* – each time the event occurs the sound will play whether the alarm has been acknowledged or not

Play For – (disabled until a sound is specified) drop-down list; *Ack Required Alarms Only, Any Alarm*

- *Ack Required Alarms Only* – the sound plays only if the **Acknowledge Required** checkbox is checked for the point generating the alarm
- *Any Alarm* - the sound plays for any alarm of this priority

Play When – (disabled until a sound is specified) drop-down list; *Highest Priority Alarm Only, Higher Priority Alarms Exist*

- *Highest Priority Alarm Only* – the sound plays if the alarm is the highest priority or equal to the highest priority present in the alarm queue; if all the higher priority alarms are acknowledged and this priority is set to play continuously, this alarm will then play its sound until acknowledged or cleared
- *Higher Priority Alarms Exist* – the sound plays no matter what other alarm priorities exist; therefore, if a higher priority alarm is playing continuously, this new alarm of a lower priority will play too

Reports

The Reports node contains the nodes that tell Intelli–Site Lite where the report templates are. The reports are run in **Report View**. The Tree stores the location of the report forms that were created using the Microsoft Report Builder 2012. The Tree also holds report settings nodes that store parameters of a report to be used repeatedly and programmatically.

Note: Intelli–Site Lite uses Microsoft Report Viewer 2012 to display reports. This version of Report Viewer is only compatible with Microsoft Report View 2012.

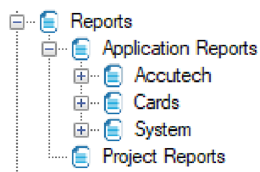


Figure 287 – Reports

The reports are separated into two groups.

Application Reports – These reports that are included with every installation of Intelli–Site Lite. There are card reports and system reports. For more information about the specific reports, see Reports Tree.

Project Reports – It is expected that the integrator, the person that writes the project programming, may need to provide reports specific to the project. Those reports will be added here.

Notice that no RDL file is a direct child of the Application Reports node. The RDL files are under either Cards or System. Before a report can be added, a group node has to be added to the Project Reports node.

Project Reports Group

A report file node must be added to a Project Reports group node.

To add a project reports group node, right-click on Project Reports and select either *Add Node* or *Add Node and Edit*. An **Enter Directory Name** dialog appears.

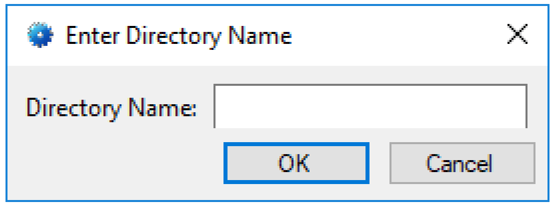


Figure 288 - Enter Directory Name dialog

Intelli–Site Lite will create a directory in the project folder to hold the report. This folder corresponds to the project reports group node. Enter the name of the folder.

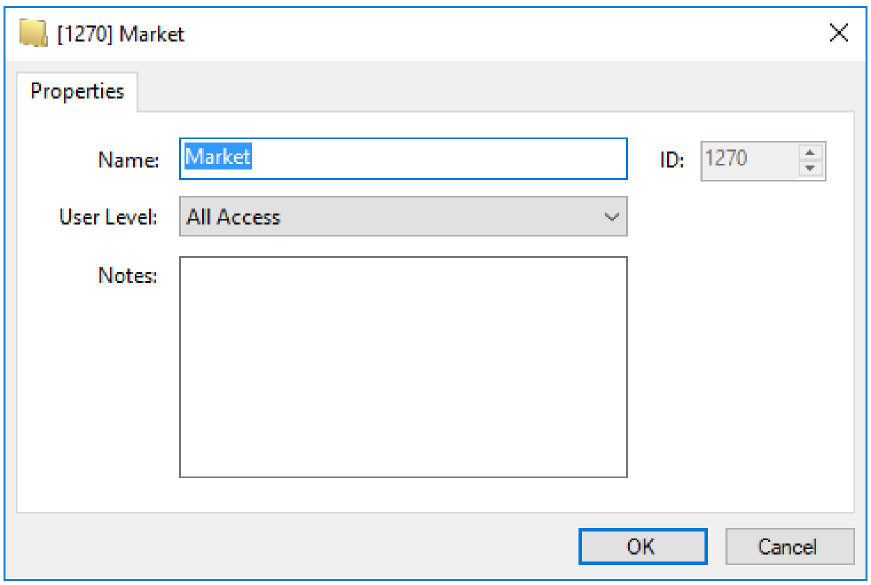


Figure 289 - Report Group properties dialog

Report

Once the project report group node has been added to the Tree, a report RDL file can be added.

Right-click on the project report group node and select either *Add Node* or *Add Node and Edit*. A Windows **Open** dialog appears allowing you to select the report file.

A new report node is added to the Project Tree.

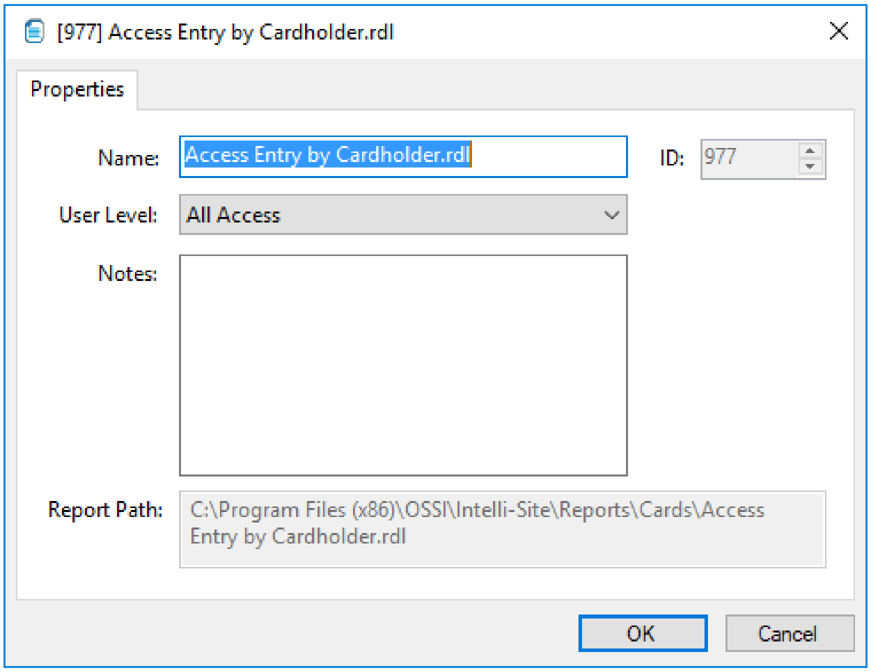


Figure 290 - Report properties dialog

Report Path – This field displays the actual location of the report on disk. Notice that this project report is in the Reports\Market subfolder of the Project. Market is the name of the directory and the node in which the actual report resides. The RDL file is copied into this folder.

Report Settings

Each report has parameters that must be filled before the report will run. At the very least, a time frame must be specified. Many of these reports are run routinely, daily, weekly, monthly, etc. They even run automatically through project programming as the target of **RunReport**, **PrintReport**, or **EmailReport** action.

To add a report settings node, right-click on the report node and select *Add Node and Edit…* A new report settings node is added to the Tree as a child of the report node. The properties dialog is opened. This dialog contains the report parameters for this report in **Reports View** with the basic node properties at the top. See Reports Tree for more details.

This node can be the target of **RunReport**, **PrintReport**, or **EmailReport** action. If the Date Type is *Custom*, a dialog will pop up for the user to specify the start and end dates.

Each Report Settings node contains the basic node properties and the specific report settings as properties. See each report in for details. See Reports Tree.

Sounds

The Sounds node contains the nodes that tell Intelli–Site Lite where the sound files are.

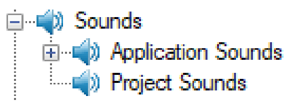


Figure 291 - Sounds

The sounds are separated into two groups.

Application Sounds – The sounds Intelli–Site Lite provides

Project Sounds – Some installations may need additional sounds. This is where they will be added to the project

Before a sound file can be added, a group node must be added to the Project Sounds node.

Project Sounds Group

A sound node must be added to a Project Sounds group node.

To add a project sounds group node, right-click on Project Sounds and select either *Add Node* or *Add Node and Edit*. An **Enter Directory Name** dialog appears.

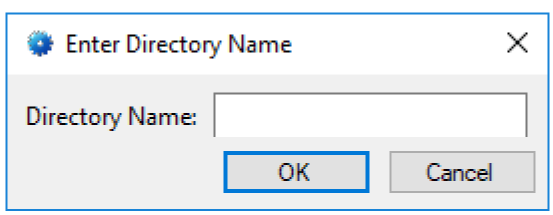


Figure 292 - Enter Directory Name dialog

Intelli–Site Lite will create a directory in the project folder to hold the sound file. This folder corresponds to the project sounds group node. Enter the name of the folder.

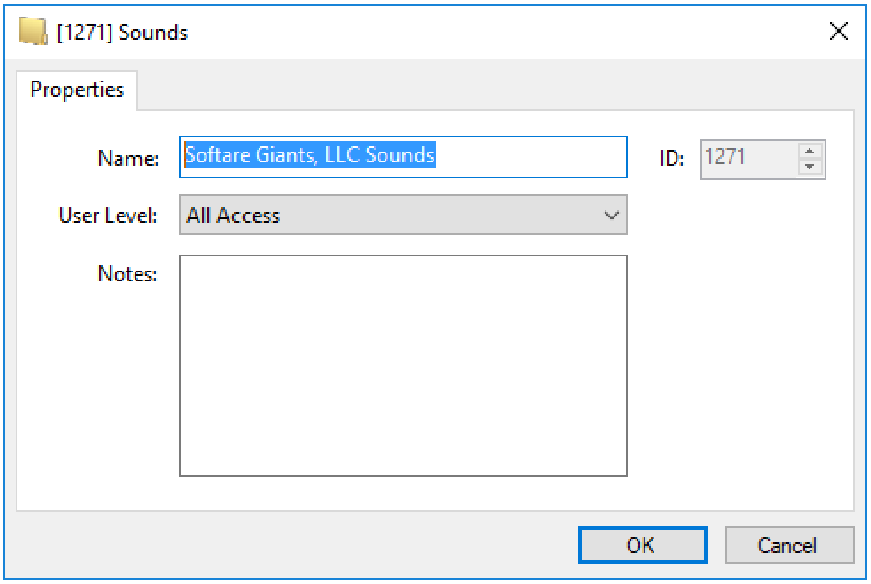


Figure 293 – Project Sounds Group properties dialog

Sound

Once the project sounds group node has been added to the Tree, a sound can be added. Intelli–Site Lite supports the wav file format.

Right-click on the project sounds group node and select either *Add Node* or *Add Node and Edit*. A Windows **Open** dialog appears allowing you to select the sound file.

A new sound node is added to the Project Tree.

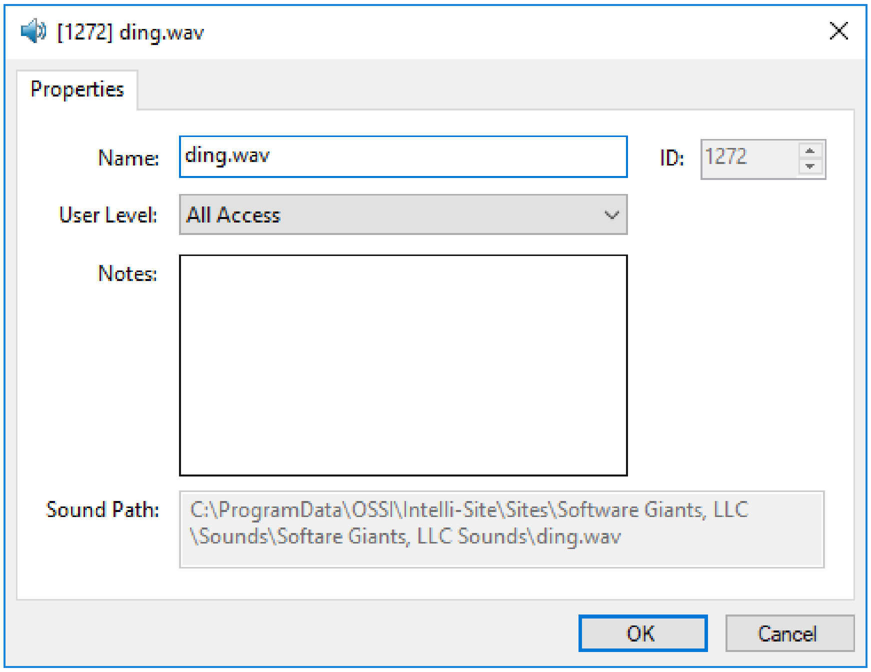


Figure 294 - Sound properties dialog

Sound Path – This field displays the actual location of the sound file on disk. Notice that this project sound file is in Sounds\Software Giants, LLC Sounds subfolder of the Project. Software Giants, LLC Sounds is the name of the directory and the node in which the actual sound file resides. The sound file is copied into this folder.

Sound Preview

To preview a sound in **Design View**, place the mouse on the sound node. Hold the mouse button down until the sound is played.

User Setup

User Setup contains the nodes that define the behavior of Intelli–Site Lite with respect to individual users.

Figure 295 - User Setup

Information Manager Layouts

The layout of the Information Manager can be customized. Multiple different layouts can be configured and assigned to individual users.

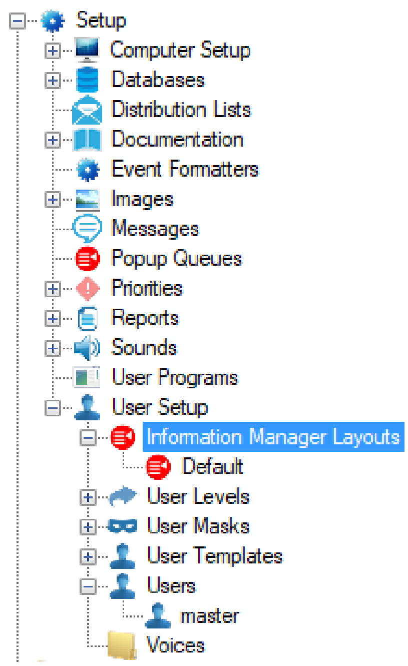


Figure 296 - Information Manager Layouts

To add a new Information Manager Layout, right-click on the **Information Manager Layouts** node and select *Add Node and Edit*. This adds the node and opens the properties.

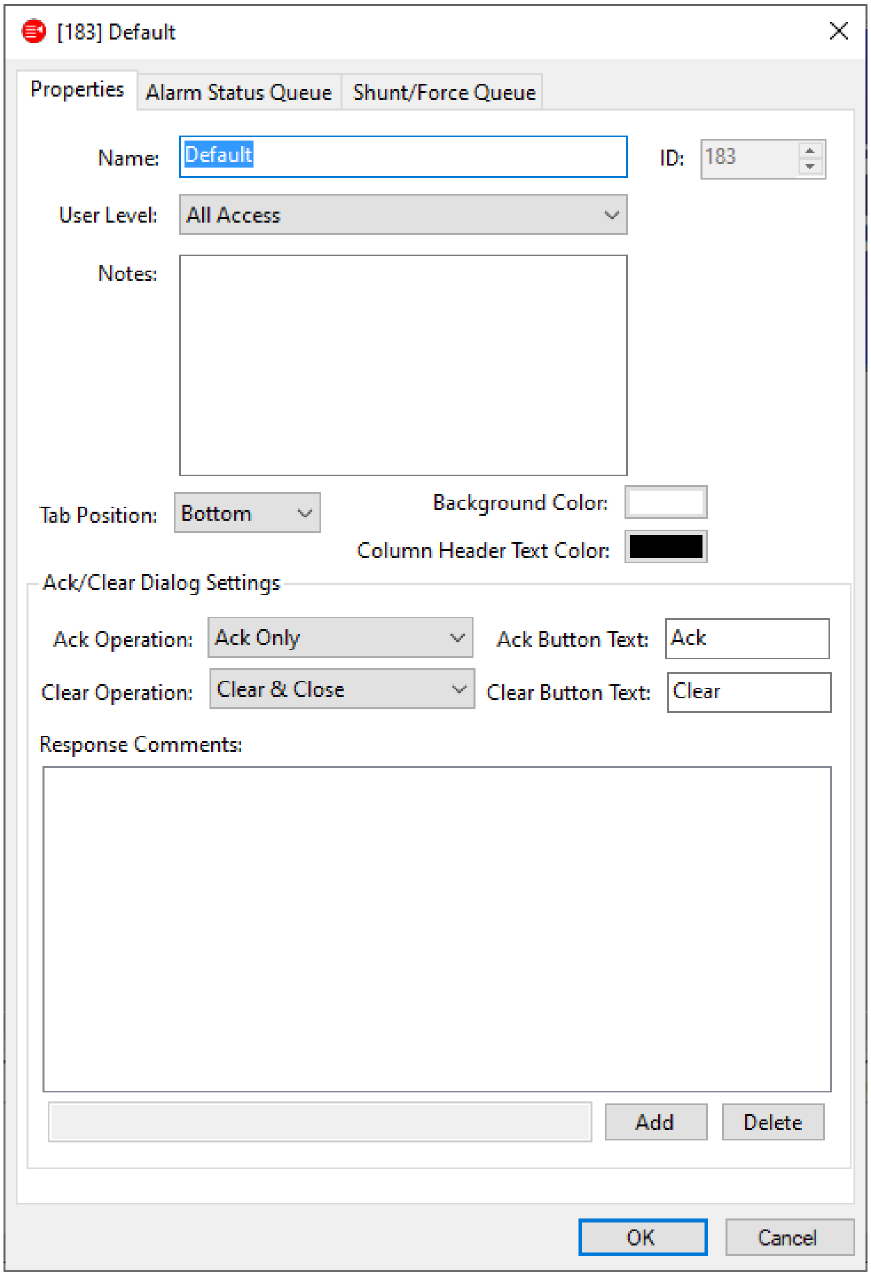


Figure 297 - Information Manager Layout properties dialog

There are three tabs:

- ***Properties***
- ***Alarm Status Queue***
- ***Shut/Force Queue***

Properties Tab

The ***Properties*** tab holds the fields that control the tab position and the Ack/Clear dialog settings.

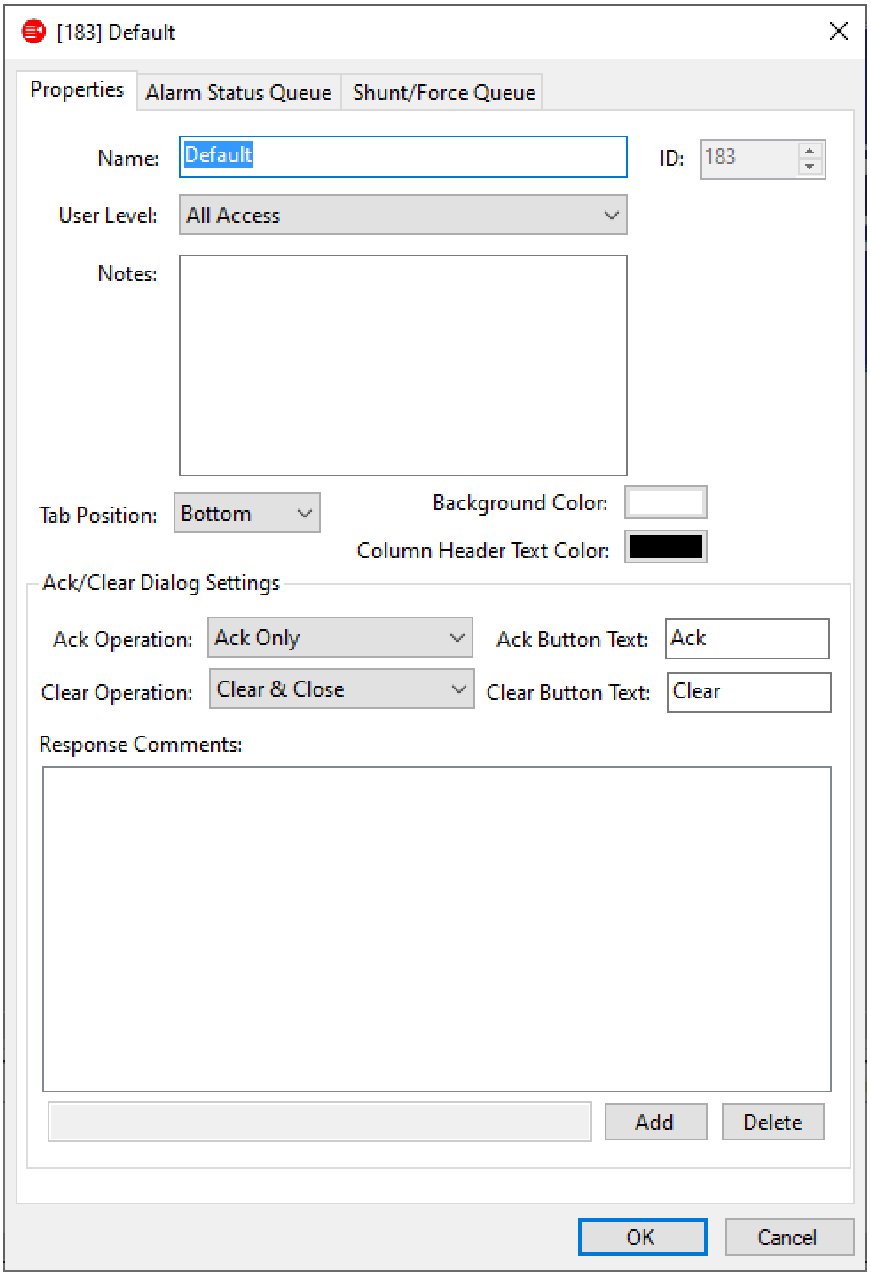


Figure 298 - Information Manager Layout: Properties tab

Name - The name for the node; the name doesn't have to be unique

ID - The unique identifier of this node; generated by Intelli–Site Lite

User Level - The User Level a user must possess to open the properties for this node, see User Levels

Notes - Any notes the user may have for the node

Tab Position – drop-down list; *Top, Bottom* (default)*, Left,* and *Right*; location of the tab header

Background Color – color selector (default:); allows a user to change the background color; white in a dark room is very bright

Column Header Text Color – color selector (); the color for the column headers

Note: The color of the event text may need to be changed after changing the background color. The text color is defined in the properties of each priority. See Priorities.

Ack Operation – drop-down list; *None, Ack Only* (default)*, Ack & Close, Ack & Clear,* and *Ack, Clear & Close*; define what the software does when the **Ack** button is clicked on the Ack/Clear dialog. Ack means acknowledge the alarm; Clear means clear the alarm; Close means close the dialog.

Ack Button Text – The text to display on the Ack button

Clear Operation – drop-down list; *None, Clear Only* (default), *Clear & Close*; the action to take when the **Clear** button is clicked on the Ack/Clear dialog. Clear means clear the alarm; Close means close the dialog.

Clear Button Text – Text to display on the Clear button

Response Comments – List of pre-defined response comments that the user can choose; text strings are added and deleted to this list using the **Add** and **Delete** buttons. Enter the string in the text field then click **Add**. The text appears in the list.

Alarm Status Queue Tab

The ***Alarm Status Queue*** tab controls the display columns and the action buttons that are used on the ***Alarm Control*** tab of the Information Manager.

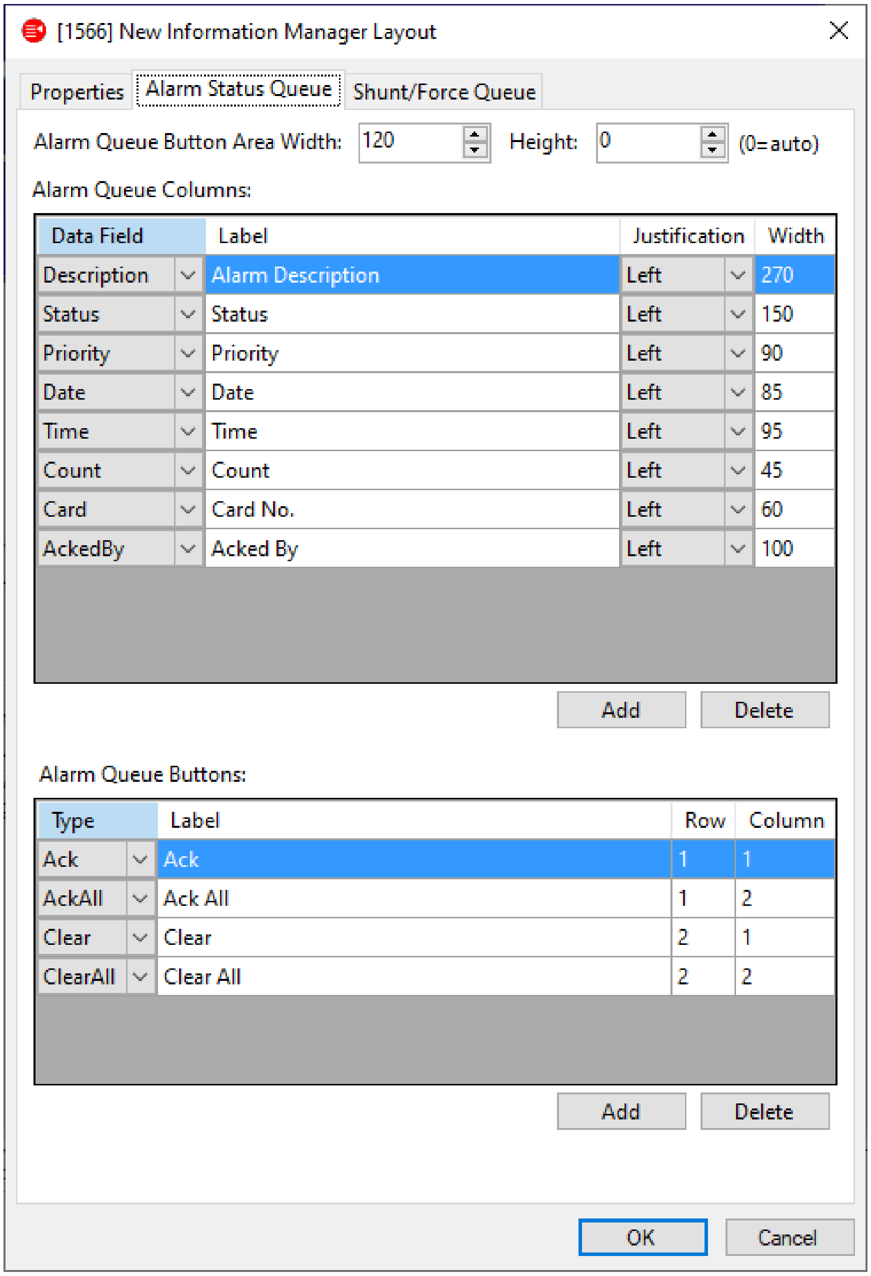


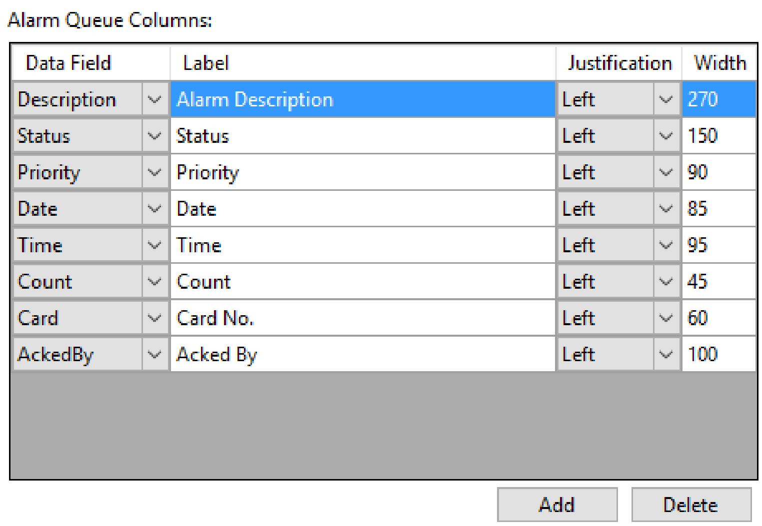
Figure 299 - Information Manager Layout: Alarm Status Queue Tab

Alarm Queue Button Area Width – numeric field (default: 120); define the width of the button region in pixels

Height – numeric field (default: 0); define the height of the button region in pixels; if the number is 0, the height of the button region is determined by the height of the Information Manager Layout

Alarm Queue Columns Table

The **Alarm Queue Columns** table defines the columns that are displayed in the Alarm Queue. There is no minimum or maximum number of columns. But if all the rows are deleted, Intelli–Site Lite assumes you want the default set of columns and will populate the table with them when the properties are saved.



Data Field – drop-down list of the possible columns

- *Description*
- *Status*
- *Priority*
- *Date*
- *Time*
- *Count*
- *Card*
- *AckedBy*
- *Screen*
- *Zone*
- *ZoneGroup*
- *None*
- *OriginalDate*
- *OriginalTime*

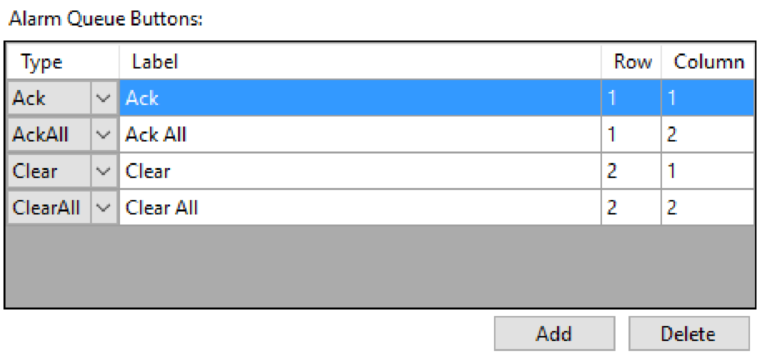
Label – The column label

Justification – drop-down list; *Left, Right,* or *Center*

Width – numeric field; Width of the column in pixels

Alarm Queue Buttons

The **Alarm Queue Buttons** table defines which buttons are displayed and which column and row each occupies. There is no minimum or maximum number of buttons. But if all the buttons are deleted, Intelli–Site Lite assumes you want the default set of buttons and will populate the table with them when the properties are saved.



Alarm Queue Buttons:

Type	Label	Row	Column
Ack	Ack	1	1
AckAll	Ack All	1	2
Clear	Clear	2	1
ClearAll	Clear All	2	2

Type – drop-down list of the available button types;

Select – Select the highlighted alarm

Action – Execute the On Action

Up – Move the highlight up

Down – Move the highlight down

Ack – Acknowledge the selected alarm

AckAll – Acknowledge all acknowledge required alarms if possible

Clear – Remove the selected alarm from the queue

ClearAll – Remove all alarms from the queue if able

NONE – The button has no action

Label – text to display on the button

Row – the button's row

Column – the button's column

There is no limit to the number of rows or columns, but the button area is fixed in size. The button's size is adjusted to fit all them in the button area.

Shut/Force Queue Tab

Shut/Force Queue Control **is not yet implemented**. When it is implemented, this tab will control the columns and buttons found on it.

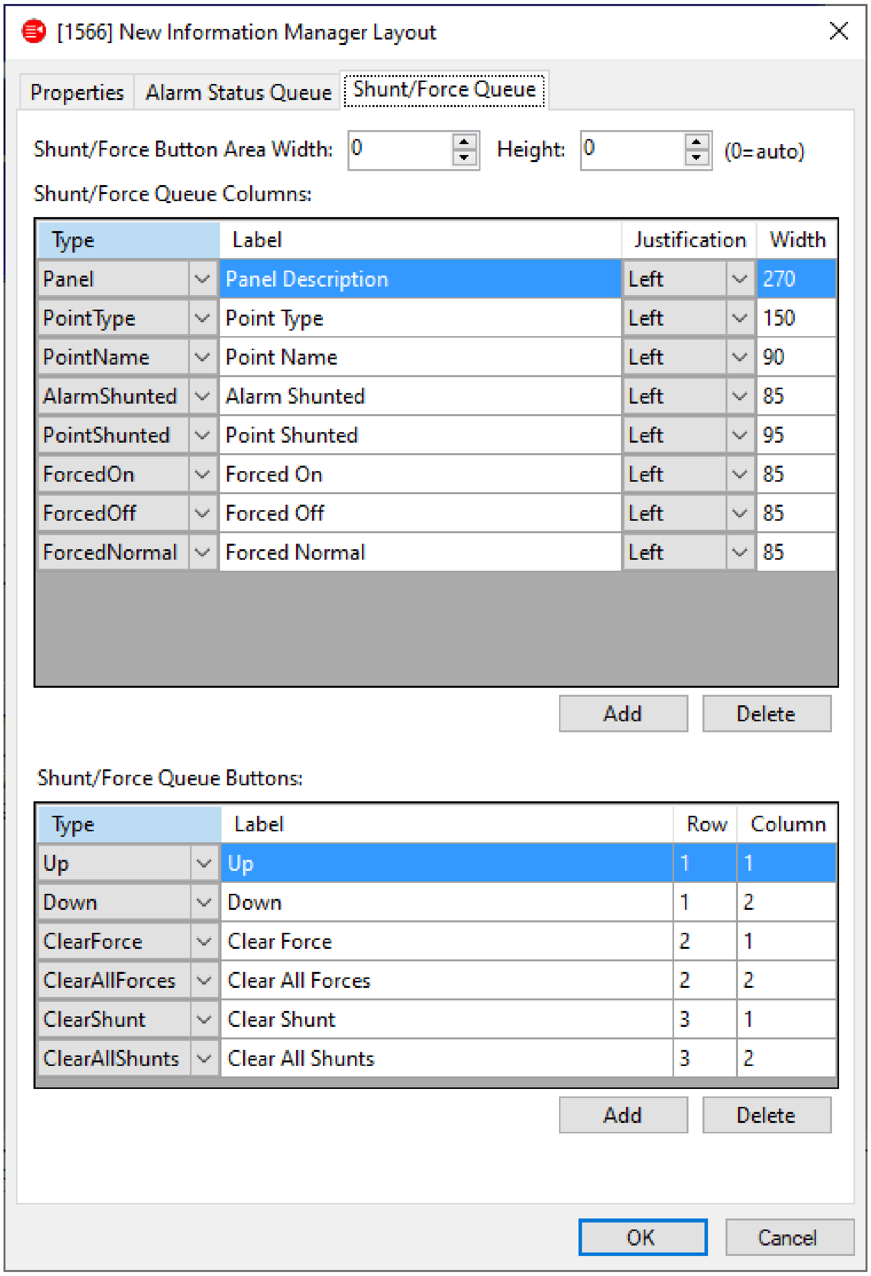


Figure 300 - Information Manager Layout: Shunt/Force Queue tab

Shunt/Force Button Area Width – numeric field (default: 120); define the width of the button region in pixels

Height – numeric field (default: 0); define the height of the button region in pixels; if the number is 0, the height of the button region is determined by the height of the Information Manager Layout

Shunt/Force Queue Columns Table

The **Shunt/Force Queue Columns** table defines the columns that are displayed in the Shunt/Force Queue. There is no minimum or maximum number of columns. But if all the rows are deleted, Intelli–Site Lite assumes you want the default set of columns and will populate the table with them when the properties are saved.

Shunt/Force Queue Columns:

Type	Label	Justification	Width
Panel	Panel Description	Left	270
PointType	Point Type	Left	150
PointName	Point Name	Left	90
AlarmShunted	Alarm Shunted	Left	85
PointShunted	Point Shunted	Left	95
ForcedOn	Forced On	Left	85
ForcedOff	Forced Off	Left	85
ForcedNormal	Forced Normal	Left	85

Add Delete

Type – drop-down list of the possible columns;

- *Panel*
- *PointType*
- *PointName*
- *AlarmShunted*
- *PointShunted*
- *ForcedOn*
- *ForcedOff*
- *ForcedNormal*
- *NONE*

Label – The column label

Justification – drop-down list; *Left, Right,* or *Center*

Width – numeric field; Width of the column in pixels

Shunt/Force Queue Buttons

The **Shunt/Force Queue Buttons** table defines which buttons are displayed and which column and row each occupies. There is no minimum or maximum number of buttons. But if all the buttons are deleted, Intelli–Site Lite assumes you want the default set of buttons and will populate the table with them when the properties are saved.

Shunt/Force Queue Buttons:

Type	Label	Row	Column
Up	Up	1	1
Down	Down	1	2
ClearForce	Clear Force	2	1
ClearAllForces	Clear All Forces	2	2
ClearShunt	Clear Shunt	3	1
ClearAllShunts	Clear All Shunts	3	2

Add Delete

Type – drop-down list of the available button types;

Up **–** Move the highlight up

Down **–** Move the highlight down

ClearForce **–** Remove the Force

ClearAllForces **–** Remove all Forces if able

ClearShunt **–** Remove the Shunt

ClearAllShunts **–** Remove all Shunts if able

NONE **–** The button has no action

Label – text to display on the button

Row – the button's row

Column – the button's column

There is no limit to the number of rows or columns, but the button area is fixed in size. The button's size is adjusted to fit all them in the button area.

User Levels

In section The Main Tab we explained that every property dialog has a **User Level** field. This is where those levels are defined.

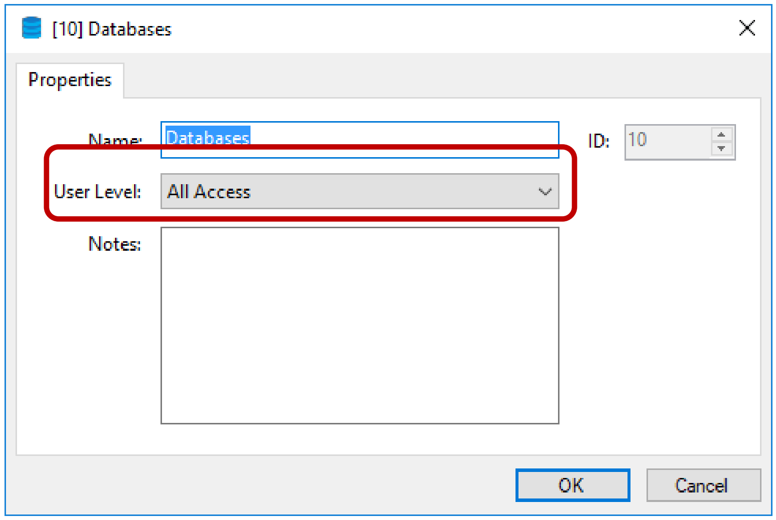
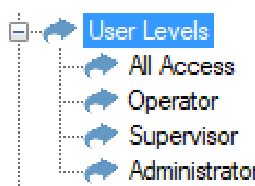


Figure 301 - Example Properties dialog

User Levels are basically access entries for Project Tree nodes. For a user to see or modify any node or information in Intelli–Site Lite, he or she must have access to it. The user mask assigned to that user must contain the user level assigned to the node. Intelli–Site Lite ships with four (4) initial User Levels.



All Access – The default user level for all nodes; nodes with this user level can be seen, accessed, and modified by any user

Operator – Intended to be used in conjunction with the **Operator** user template to limit access to nodes based on the user's template; an operator is expected to only operate the Intelli–Site Lite system and have extremely limited access

Supervisor – Intended to be used in conjunction with the **Supervisor** user template to limit access to nodes based on the user's template; a supervisor is expected to have more rights and privileges than an operator but not as much as an administrator

Administrator – Intended to be used in conjunction with the **Administrator** user template to limit access to nodes based on the user's template; an administrator is expected to have nearly unlimited if not unlimited access to all the functionality of Intelli–Site Lite.

Additional user levels can be added by right-clicking on the **User Levels** node and selecting *Add Node* or *Add Node and Edit*. There are only the basic properties on the **User Level** node.

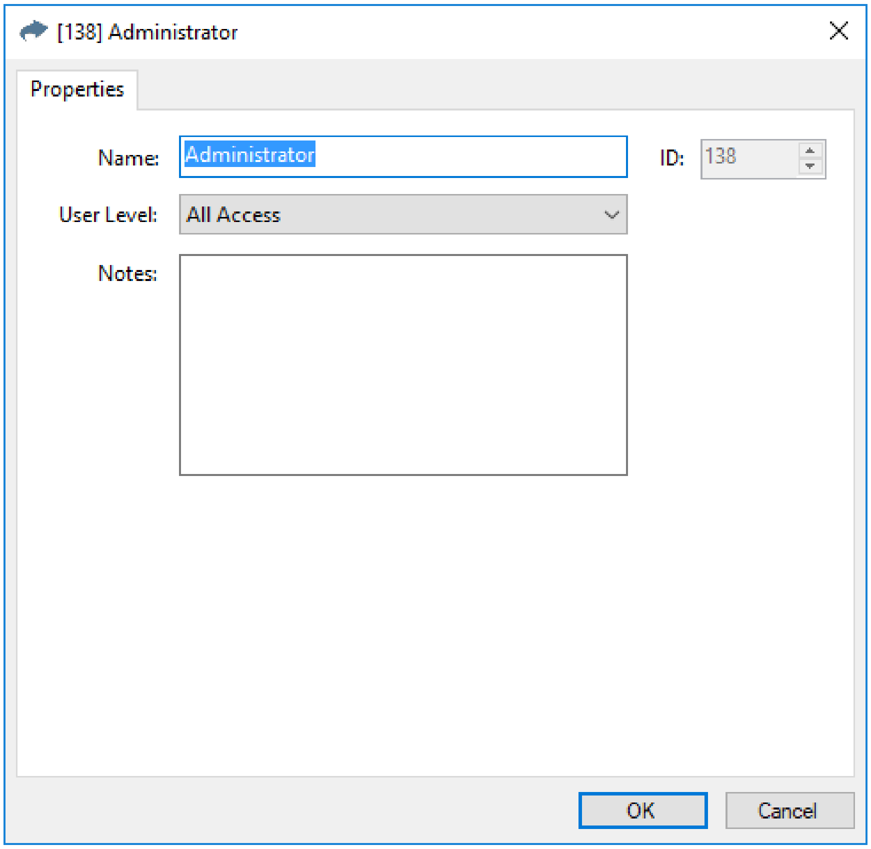
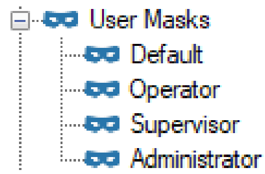


Figure 302 - User Level Properties dialog

Note: It is ironically possible to change the user level and make it impossible for you to see the node. Care should be taken when changing User Levels and User Masks.

Users Masks

A user mask corresponds to an access set for a user. A user mask lists all the user levels to which the specific user has been given access. Intelli–Site Lite ships with four (4) user masks.



Default – Contains only the **All Access** user level; this is the default user mask

Operator – Intended to be used in conjunction with the **Operator** user template; contains the **All Access** user level and the **Operator** user level

Supervisor – Intended to be used in conjunction with the **Supervisor** user template; contains **All Access**, **Operator**, and **Supervisor** user levels

Administrator – Intended to be used in conjunction with the **Administrator** user template; contains **All Access**, **Operator**, **Supervisor,** and **Administrator** user levels

Additional user masks can be added by right-clicking on the **User Masks** node and selecting *Add Node* or *Add Node and Edit*.

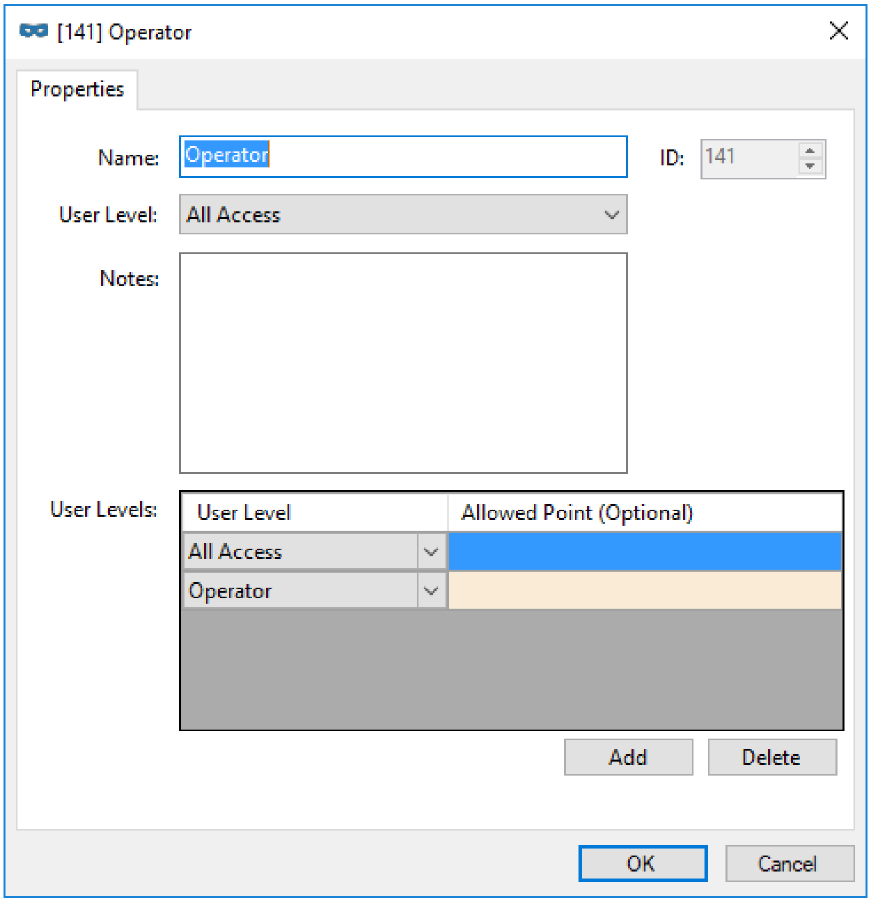


Figure 303 - User Mask Properties dialog

A **User Mask** node has all the basic properties plus the **User Levels** table.

User Levels – table; list of the user levels included in this user mask;

> **User Level** – drop-down list of the user level nodes; the selected user level is assigned to this mask
>
> **Allowed Point (Optional)** – optional, drop box; accepts I/O Points; when the I/O Point is high, this user level is included in the user mask; when the point is low, the user level is not included; when this field is empty, the user level is always included in the mask.

 - button; add a row to the **User Levels** table

- button; delete the selected row form the **User Levels** table

---

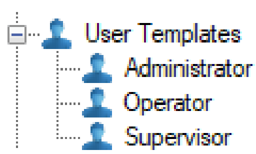
Note: Just like the user level, it is ironically possible to change the user mask and make it impossible for you to see the node. Please be careful when changing User Levels and User Masks.

User Templates

Most installations have users of different kinds, but they are distinctive. Operators have extremely limited access to the features of the software. They can logon, access **Live View**, and maybe add cards to personnel. There is usually a group of user that has more access than an operator. Call them Supervisors. And of course, there must be at least one Administrator of the system. Some installations have even more user types. These user types can be set up as **User Templates** so that every future user added to the Project can be quickly configured with the same settings.

Intelli–Site Lite has three (3) user templates when a Project is first created. Before adding any users, modify these templates to fit the needs of your installation.

Note: Changes made to a User Template will NOT propagate to any existing users. Therefore, ensure all desired changes are made before users are added.



Administrator – template for the most privileged users of the Intelli–Site Lite software

Operator – template for the least privileged users of the Intelli–Site Lite software

Supervisor – template for the semi-privileged users of the Intelli–Site Lite software

These user templates can be modified, or you can add your own templates. Whatever user template nodes there are will be the ones you will choose from when a user is added.

Use the right-click context menu of the **User Templates** to add a new user template. To edit the properties of an existing user template, right-click on the target user template node and select *Properties.* This **User Template** properties dialog looks nearly identical to the **User** properties dialog. All it lacks is the **Password** field.

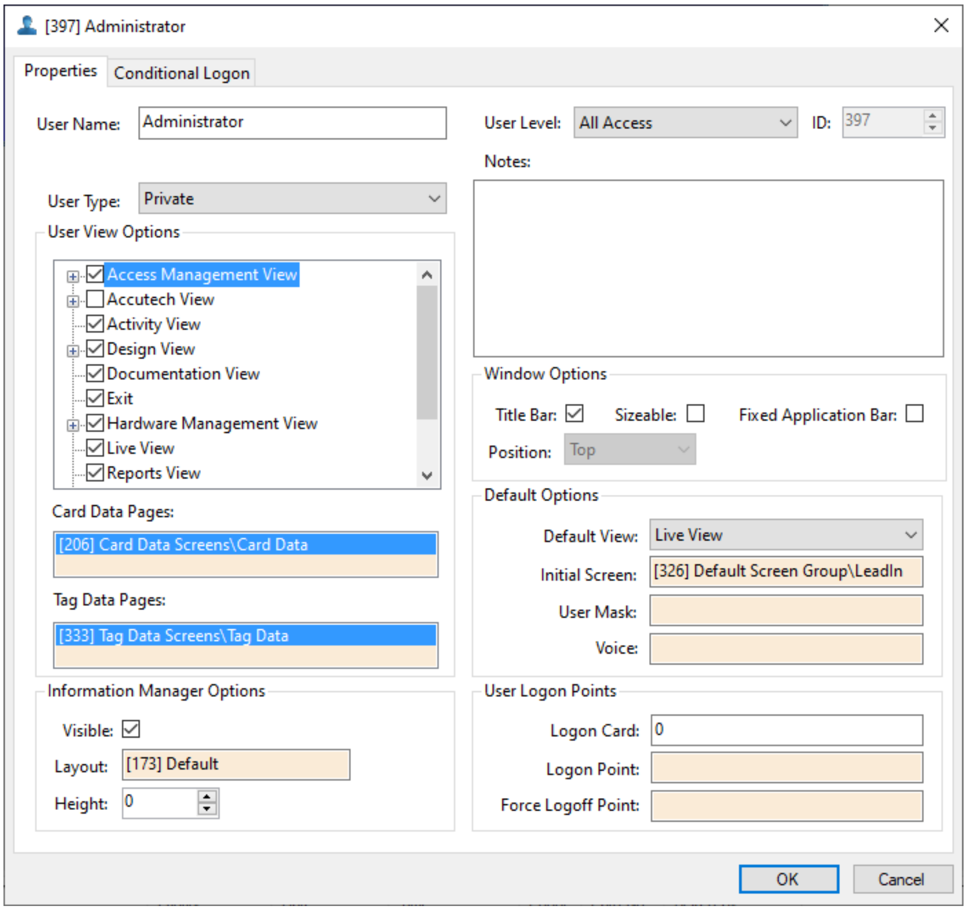


Figure 304 - User Template Properties dialog

There are two tabs: ***Properties*** and ***Conditional Logon***.

User Template Properties tab

The ***Properties*** tab contains all the fields that govern the user's environment, access, and look and feel.

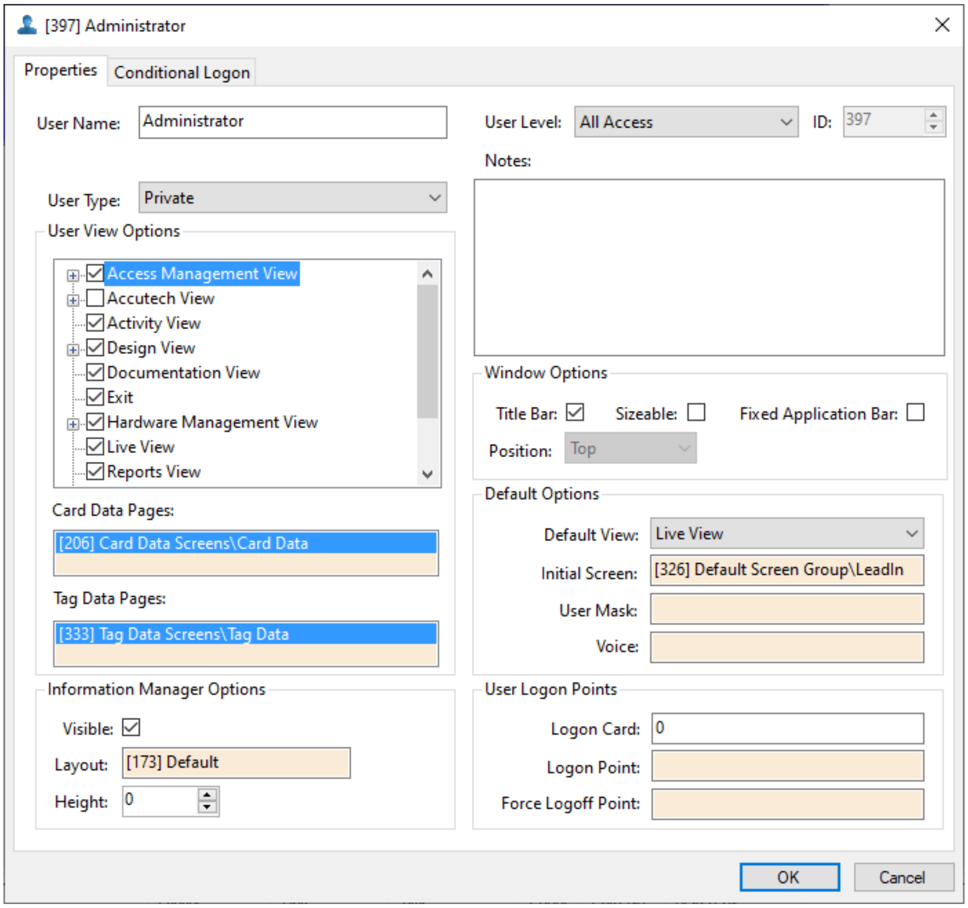
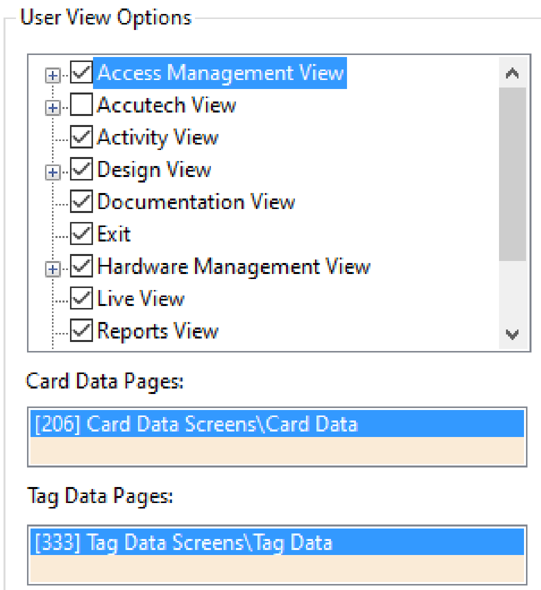


Figure 305 - User Template: Properties tab

User View Options

User View Options are fields related to the Views and what the user can see and do in them.



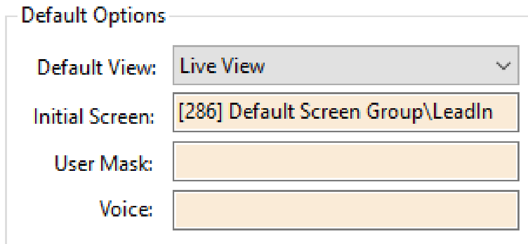
User View Options list - checkbox tree of the Views and each View’s options if available; when checked, that item is visible to this user

Card Data Page – drop list; the Card Data screens to use as card data pages for this user in **Access Management View**

Tag Data Pages – drop list; the Tag Data screens to use as tag data pages for this user in **RFID Management View**

Default Options

The **Default Logon Options** are the fields that define the Intelli–Site Lite environment at logon



Default View – drop-down list; the selected View is the View presented to the user at logon

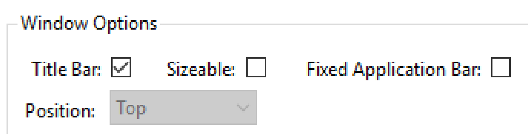
Initial Screen – drop box; the screen displayed when the user enters **Live View** the first time

User Mask – drop box; the user mask assigned to the user; when empty, the user can see every node without restriction

Voice – drop box; the voice to use whenever Intelli–Site Lite speaks

Window Options

The **Window Options** fields control the window characteristics.



Title Bar – checkbox; the title bar is visible

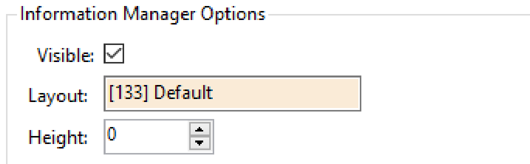
Sizeable – checkbox; the user can resize the window

Fixed Application Bar – checkbox; display the Application Bar in a fixed position on the screen; when checked the **Position** drop-down list is enabled

Position – drop-down list; location for the Application Bar: *Left, Right, Top, Bottom* of the screen

Information Manager Options

The **Information Manager Options** fields control if and how the Information Manager displays for this user.



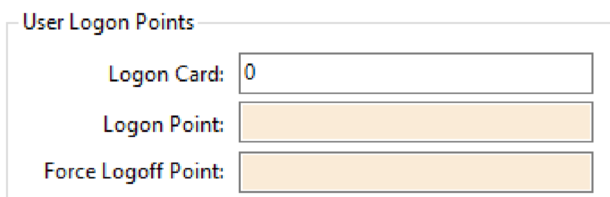
Visible – checkbox; when checked the Information Manager displays for this user

Layout – drop box; the Information Manager Layout to use when displaying the Information Manager

Height – the height in pixels of the Information Manager; zero (0) means use the software default height

User Logon Points

The **User Logon Points** fields are those fields that affect the logged-on user.



Logon Card – edit box; when this card is used at the **Sign On Reader**, this user is logged on. See Computer node properties: Associated Hardware.

Logon Point – drop box; this point is set when the user logs on

Force Logoff Point – drop box; when this point is set, this user will be logged off

User Template Conditional Logon Tab

The ***Properties*** tab defines the logon and user behavior in general. But there will be some conditions that require a different set of behaviors. Perhaps a user should only logon on one computer in the Intelli–Site Lite system. Or a computer in the library should not allow **Access Management View**. That's where the ***Conditional Logon*** tab comes in.

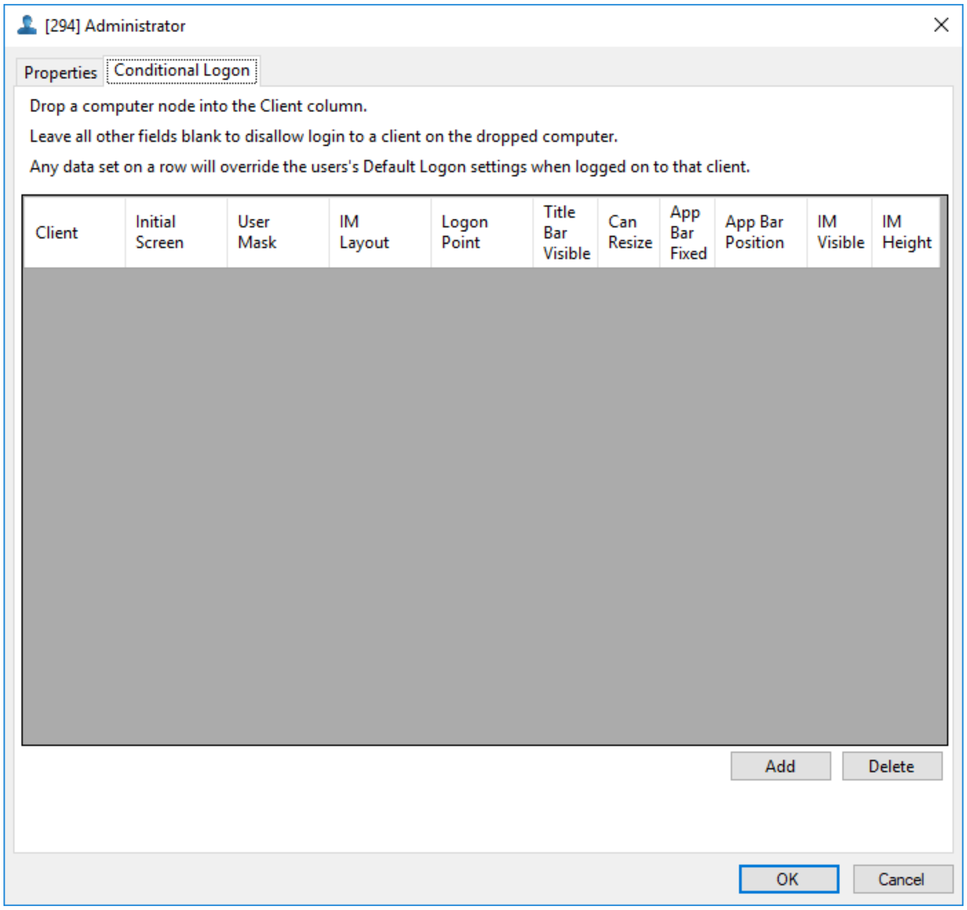


Figure 306 - User Template Conditional Logon tab

Use the **Add** and **Delete** buttons to add and delete rows in the table. Any data in the row will override the user's logon settings from the ***Properties*** tab for the supplied computer node.

Users

Users are user accounts much like computer accounts. Every project Intelli–Site Lite creates has one user initially. This allows you to logon. This user is named **master**. The password for this user is "m" (case-sensitive). We strongly suggest this password be changed. See Changing User Password.

Note: Changes made to a user's properties take effect the next time that user logs in.

Additional users should be added and given access to the various aspects of Intelli–Site Lite that he or she needs. The User Templates allow you to create templates for these new users. See User Templates.

To add a new user, right-click on the **Users** node and select *Add Node and Edit*. Intelli–Site Lite will display an **Add User** dialog asking for the user template to use when creating this new user.

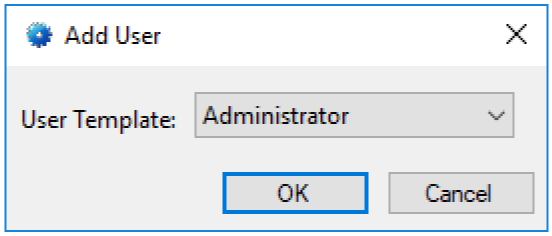


Figure 307 - Add User dialog

User Template – drop-down list; a list of all the templates under [User Templates]; the selected template is used when creating the new user

After clicking OK, a new user node is added and the properties open if *Add Node and Edit* was selected.

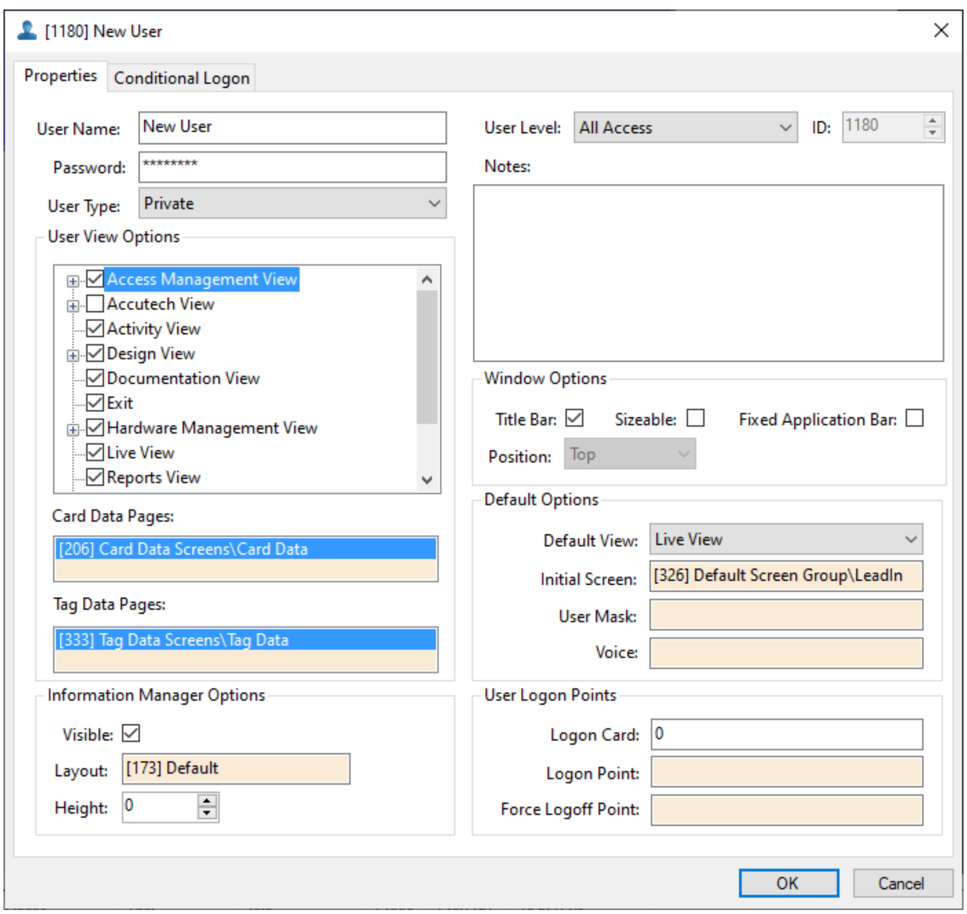


Figure 308 - User properties dialog

There are two tabs: ***Properties*** and ***Conditional Logon***.

User Properties tab

The ***Properties*** tab contains all the fields that govern the user's environment, access, and look and feel.

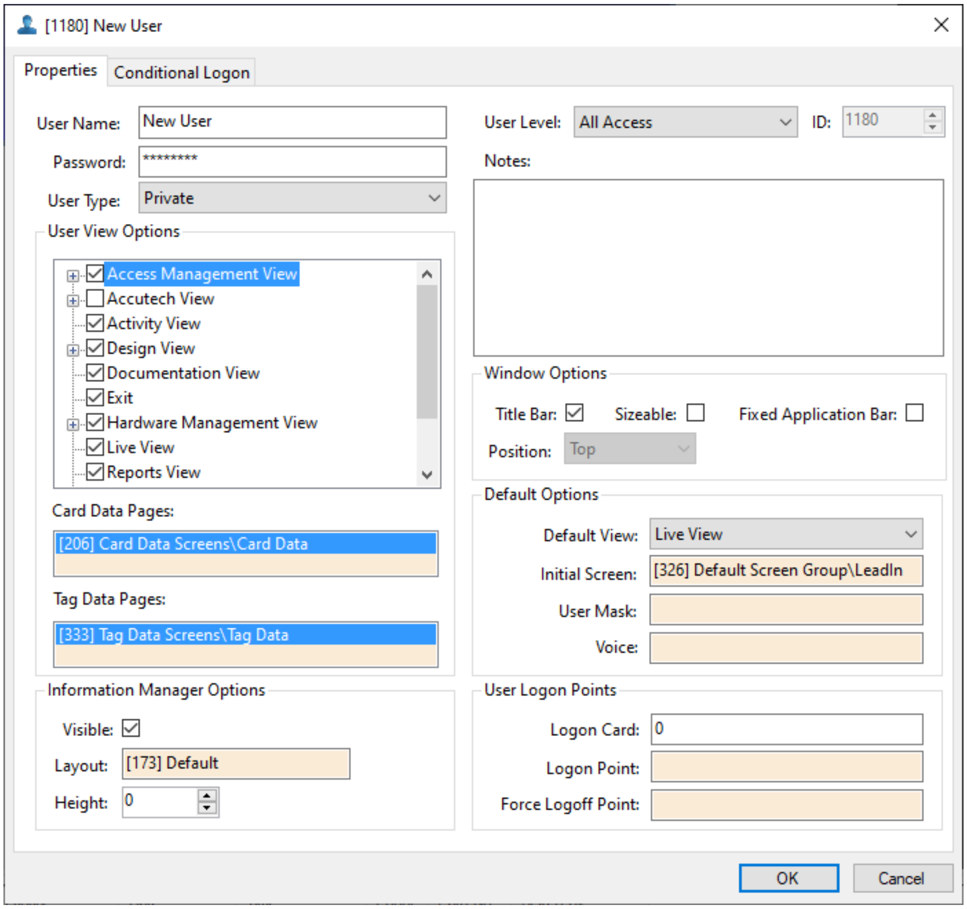


Figure 309 - User Properties tab

User Name - The name for the user and the name of the node; the name doesn't have to be unique; if the name is not unique the first user found matching the supplied user name on login is the user that will be logged in. If that's confusing, then ensure the users' names are unique.

Password – The password for this user, case-sensitive; disabled when the **User Type** is set to either *Domain User* or *Domain Group*

User Type – drop-down list; values *Private* (default), *Domain User*, and *Domain Group*

ID - The unique identifier of this node; generated by Intelli–Site Lite

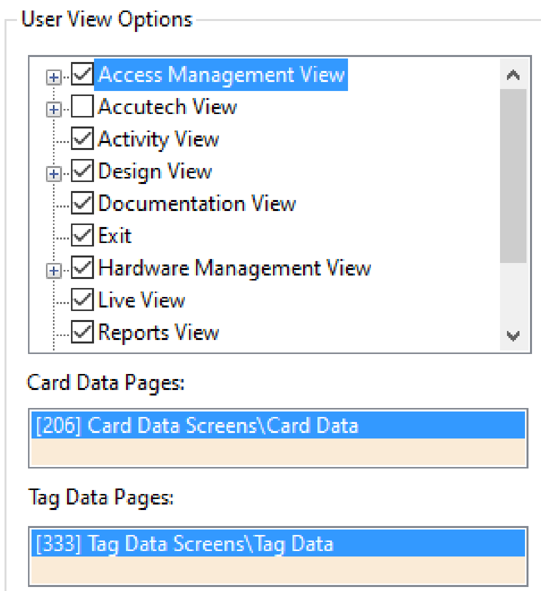
User Level - The User Level a user must possess to open the properties for this node, see User Levels

Notes - Any notes the user may have for the node

The rest of the fields are described in the following sections organized by group.

User View Options

User View Options are fields related to the Views and what the user can see and do in them.



User View Options list - checkbox tree of the Views and each View's options if available; when checked, that item is visible to this user

- Access Management
  - Access Set Maintenance
  - Access Tab
  - Activity Tab
  - Badge Tab
  - Card Add
  - Card Delete
  - Card Edit
  - Holiday Maintenance
  - Photo Maintenance
  - Time Zone Maintenance
  - Vehicle Tab
- Accutech View
  - Hide Photo
  - Hide Tag List
- Design View
  - User Maintenance
- Documentation View
- Exit
- Hardware Management View
  - Configuration
- Live View

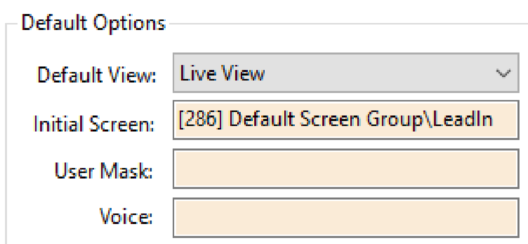
- Reports View
- RFID Management View
  - Access Tab
  - Activity Tab
  - Photo Maintenance
  - Tag Add
  - Tag Delete
  - Tag Edit
  - Tag Group Maintenance
  - Tag Groups Tab
  - Zone Maintenance
- Scheduled Events View
- Video View

Card Data Pages – drop list; the Card Data screens to use as card data pages for this user in **Access Management View**

Tag Data Pages – drop list; the Tag Data screens to use as tag data pages for this user in **RFID Management View**

Default Options

The **Default Logon Options** are the fields that define the Intelli–Site Lite environment at logon



Default View – drop-down list; the selected View is the View presented to the user at logon

Initial Screen – drop box; the screen displayed when the user enters **Live View** the first time

User Mask – drop box; the user mask assigned to the user; when empty, the user can see every node without restriction

Voice – drop box; the voice to use whenever Intelli–Site Lite speaks

Window Options

The **Window Options** fields control the window characteristics.

Title Bar – checkbox; when checked, the title bar is visible

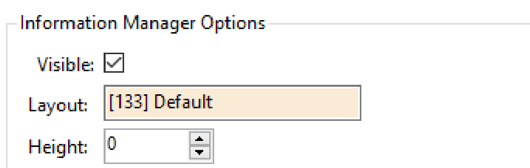
Sizeable – checkbox; when checked, the user can resize the window

Fixed Application Bar – checkbox; display the Application Bar in a fixed position on the screen; when checked the **Position** drop-down list is enabled

Position – drop-down list (default: *Top*); location for the Application Bar; values are *Left, Right, Top,* and *Bottom* of the screen

Information Manager Options

The **Information Manager Options** fields control if and how the Information Manager displays for this user.



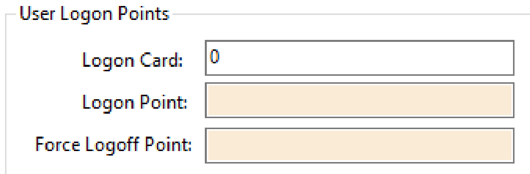
Visible – checkbox; when checked the Information Manager displays for this user

Layout – drop box; the Information Manager Layout to use when displaying the Information Manager

Height – the height in pixels of the Information Manager; zero (0) means use the software default height

User Logon Points

The **User Logon Points** fields are those fields that affect the logged-on user.



Logon Card – edit box; when this card is presented to the **Sign On Reader**, this user is logged on. See Computer node properties: Associated Hardware.

Logon Point – drop box; this point is set when the user logs on

Force Logoff Point – drop box; when this point is set, this user will be logged off

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Note: When a User's logon is card-access authentication, the card reader used for this purpose must be specified in the Computer node properties. See the field Sign-On Reader in section Associated Hardware.

User Conditional Logon Tab

The ***Properties*** tab defines the logon and user behavior in general. But there will be some conditions that require a different set of behaviors. Perhaps a user should only logon on one computer in the Intelli–Site Lite system. Or a computer in the library should not allow **Access Management View**. That's where the ***Conditional Logon*** tab comes in.

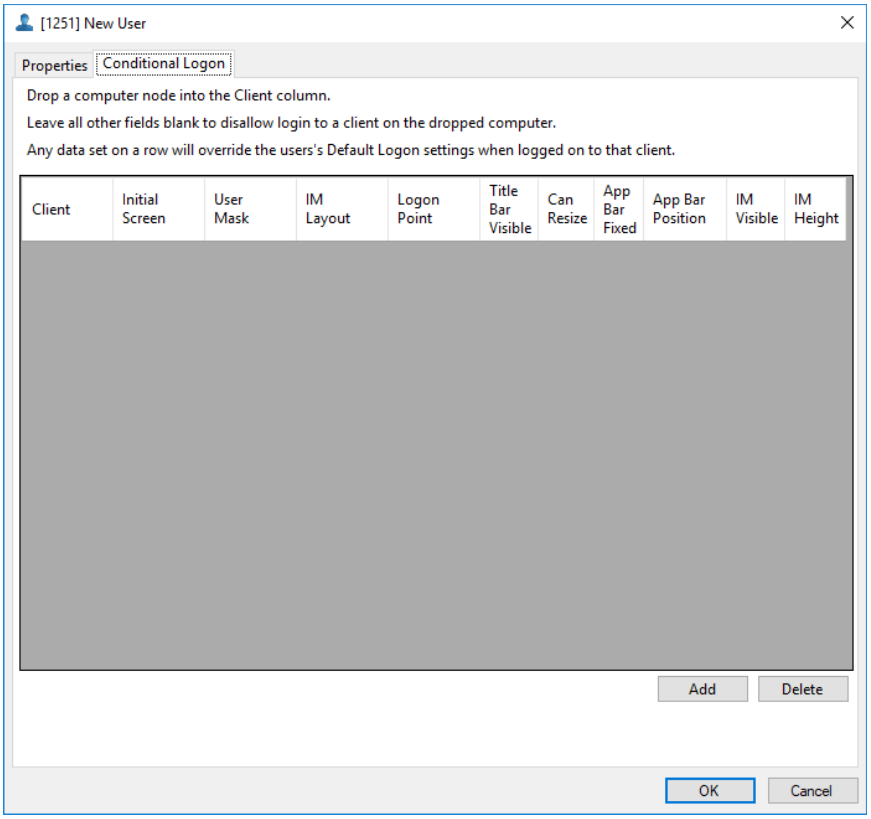

Figure 310 - User Conditional Logon tab

Use the **Add** and **Delete** buttons to add and delete rows in the table. Any data in the row will override the user's logon settings from the ***Properties*** tab for the supplied computer node.

Changing User Password

To edit a user account, locate the user node by expanding **Setup** -> **User Setup** -> **Users**. Right-click on the target user node and select *Properties*. This opens the properties dialog.

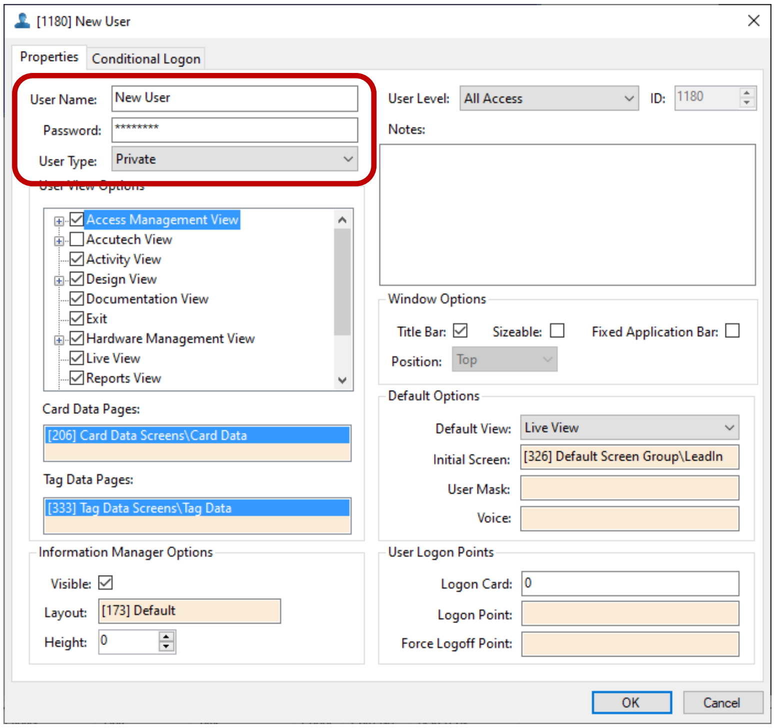

Figure 311 - User Properties dialog

Locate the **Password** field and change the value. Remember that passwords are case-sensitive. Click OK to save the changes.

Setting Up Active Directory Authentication

Intelli–Site Lite can be set up to integrate with Active Directory to authenticate users as individual Domain Users or as Domain Groups. The secret is the **User Type** field on a user node's properties dialog and of course the **User Name** field.

Note: Logging in using Active Directory as the authentication method must be done from a computer that is a member of the Domain. Authentication occurs on the client-side whether it is the Desktop Client or the web client.

To allow a user to logon as a specific domain user add a user node by right-clicking on the **Users** node and select *Add Node and Edit.* The properties dialog opens. Set the **User Type** field to *Domain User* and the **User Name** to the fully qualified domain name. The **Password** field is disabled because the password is authenticated using Active Directory.

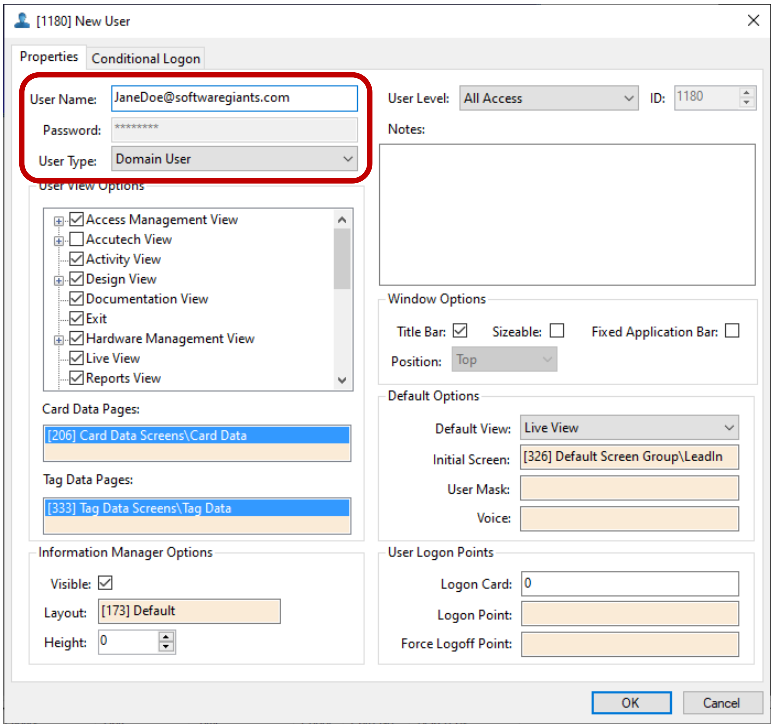

Figure 312 - User node properties dialog for a Domain User type

When Jane Doe logs in, she will use her domain logon ID and her domain password.

To allow any user to logon who belongs to a specific domain group add a user node then set the **User Type** field to *Domain Group* and the **User Name** to the domain name. The **Password** field is disabled.

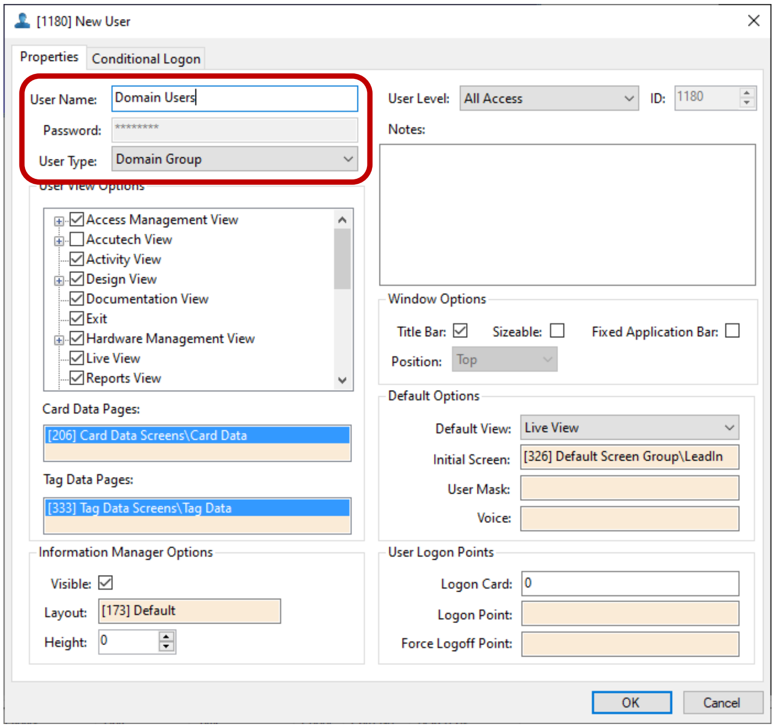

Figure 313 - User properties dialog for a Domain Group type

Once this user node is part of the Intelli–Site Lite Project, any Domain ID that is a member of the Domain Users group will be able to logon to Intelli–Site Lite.

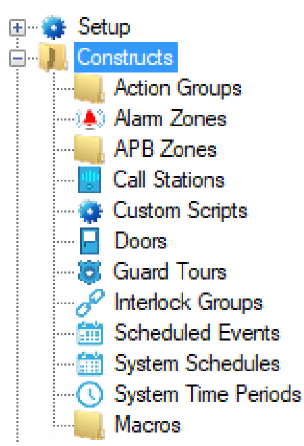

Figure 315 - Constructs

Figure 348 - Macro Properties dialog

Cardholder Control

Cardholder Control contains the badges and card data screens that are used in **Access Management View**.

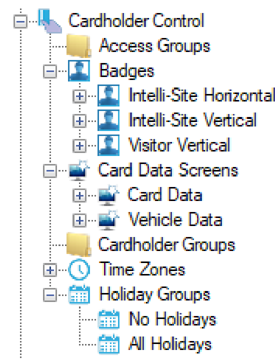

Figure 369 - Cardholder Control

Access Groups

Note: The Access Management View is the preferred method to manage Access Groups.

Badges

The badges used on the ***Badge*** tab in **Access Management View** are located here. Each badge has a front and a back. Intelli–Site Lite has included templates for three different badges: a horizontal badge, a vertical badge, and a visitor badge.

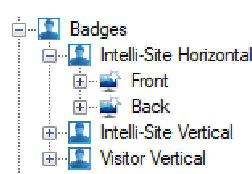

Figure 370 – Badges

The **Front** and **Back** nodes are special screen nodes. Double-clicking on a badge **Front** or **Back** node opens it for editing in the Design Region.

Note: When displaying database fields on the badge use the Database Field Display screen object.

Add a Badge

To add a custom badge, right-click on **Badges** node and select *Add Node*. An **Add Badge** dialog appears.

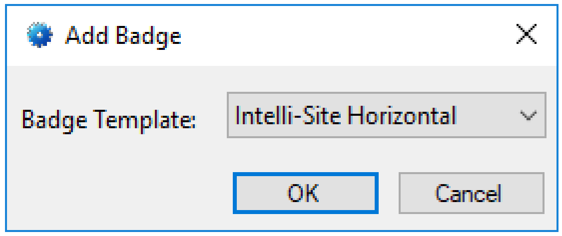

Figure 371 - Add Badge dialog

Badge Template – drop-down list; contains all the existing badges under the **Badges** node

Clicking 

will add a new badge based on the selected template. The name of the new badge will be a copy of the template. In the case above, the new badge is named "Intelli–Site Horizontal Copy".

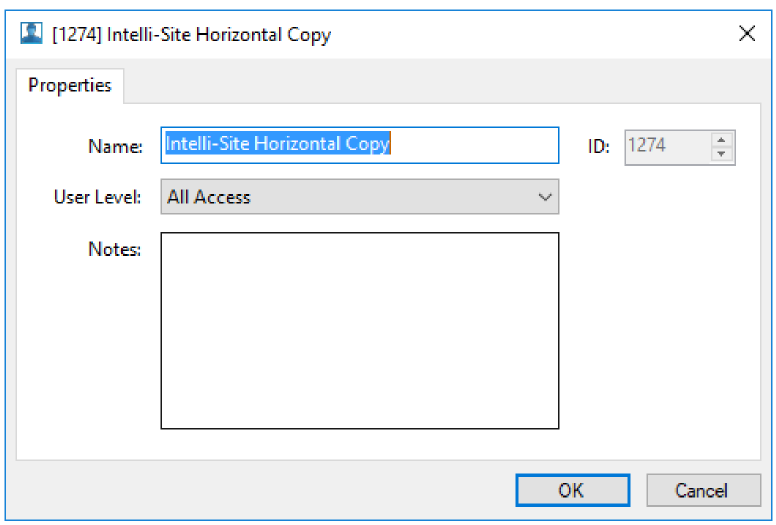

Figure 372 - Badge properties dialog

Just like the other badges, the new badge has a **Front** and a **Back** node.

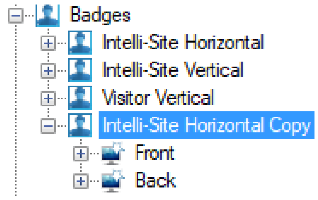

Figure 373 - Badges with new badge added

The **Front** and **Back** nodes are special screen nodes. The *Properties* option of the context menu displays the properties dialog.

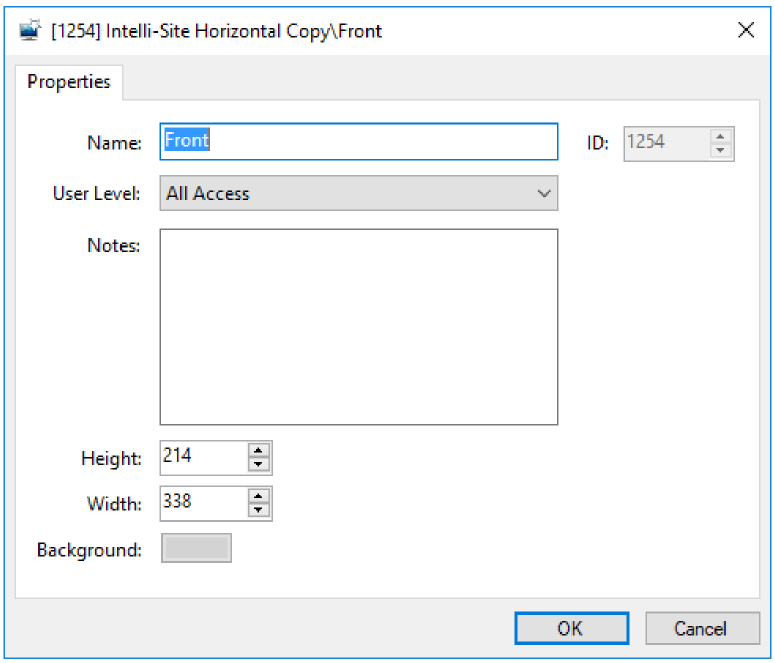

Figure 374 - Badge Front properties dialog

Height – numeric field; Height of the badge

Width – numeric field; Width of the badge

Background – Background color of the badge

Note: Height and Width should be the same for both the Front and Back of the badge.

Edit a Badge

Editing of a badge **Front** or **Back** is done in **Design View**. Double-click on the **Front** or **Back** node to open it in the Design Region.

Note: To add a database field to a badge, use a Database Field Display screen object.

Card Data Screens

The card data screens that are the card data tabs in **Access Management View** are located here. Intelli–Site Lite has included two card data screens. **Card Data** is the main card data screen. The **Vehicle Data** screen is an example vehicle data tab.

Figure 375 - Card Data Screens

Add a Card Data Screen

Card Data Screens are added in **Design View**. To add a new card data screen, right-click on **Card Data Screens** and select *Add Node and Edit.* The properties for the new card data screen display.

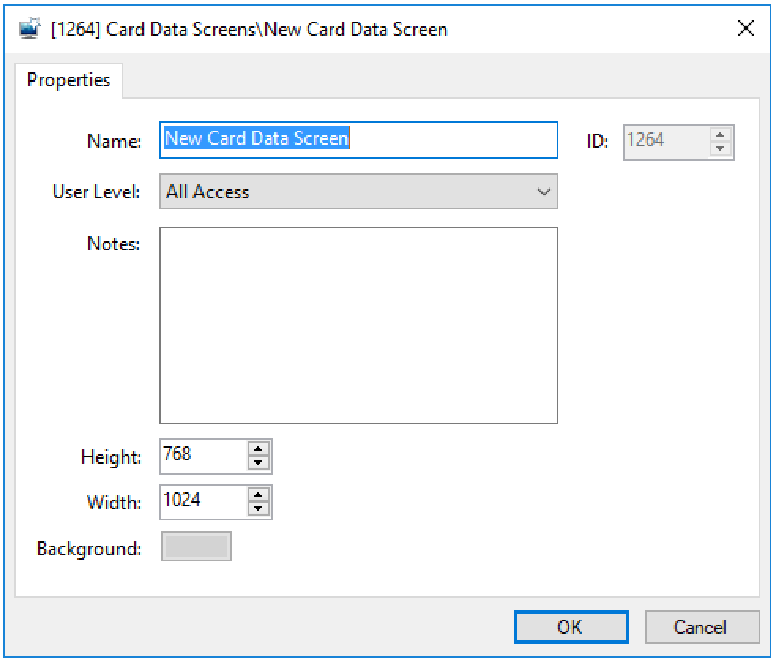

Figure 376 - New Card Data Screen properties dialog

Height – numeric field; Height of the card data screen

Width – numeric field; Width of the card data screen

Background – Background color of the card data screen

Note: The height and width of any card data screen must be no bigger than 430 by 500. Any larger and it will not fully display in Access Management View.

Edit a Card Data Screen

Card data screens are edited in **Design View**. Double-click on the Card Data screen node to open it in the Design Region.

Note: To add a database field to a card data screen, drag and drop the database field node from the Tree onto the design screen. Intelli–Site Lite will automatically create the database field control screen object and label.

Display a Card Data Screen in Access Management View

For the new card data screen to appear in **Access Management View**, it must be added to the drop list of card data pages in the User properties. It must also be added to each and every user that needs to see it.

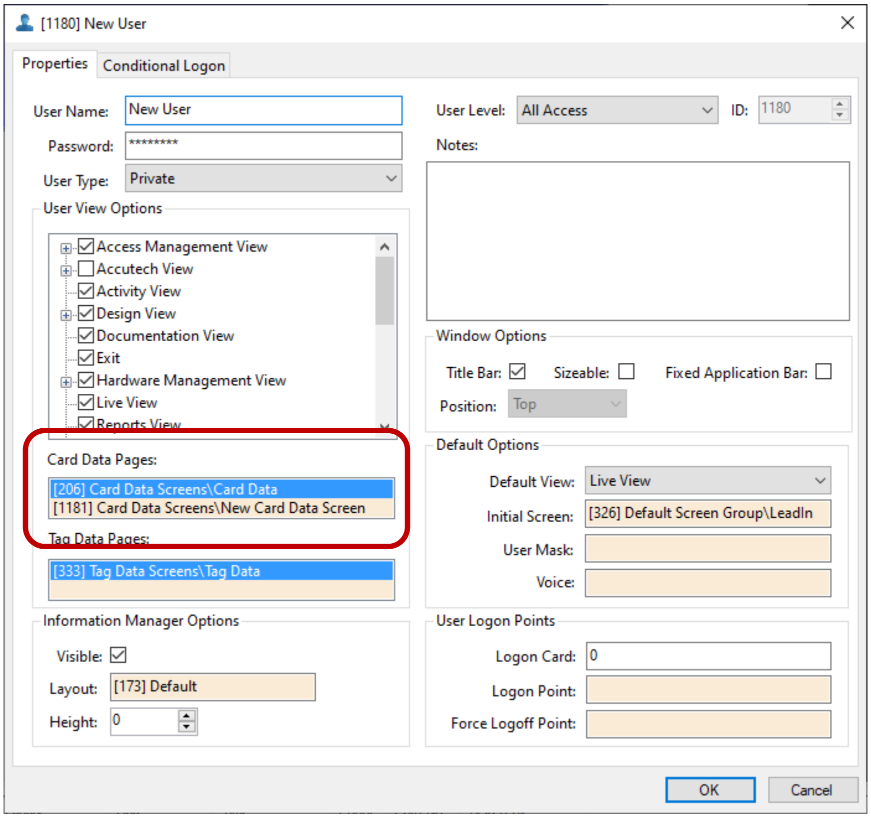

Figure 377 - User properties with updated Card Data Pages

Note: Best practices suggest to create all necessary card data screens and add them to the default user node before adding any new user nodes. The default user node is the template for all new user nodes.

Cardholder Groups

Not Yet Implemented

Time Zones

The Time Zones are stored here in the Tree.

Note: The Access Management View is the preferred method to manage Time Zones.

Holiday Groups

The holidays are stored here in the Tree.

Note: The Access Management View is the preferred method to manage Holidays.

On the rare occasion it is necessary to segregate holidays into groups. The first group must be added here to inform **Access Management View** that groups are needed for this Project. Once this is done, a new drop-down list control is added to the ***Holidays & Time Zones*** tab. This new control defines what is added, a holiday or a group, when the Add button is clicked.

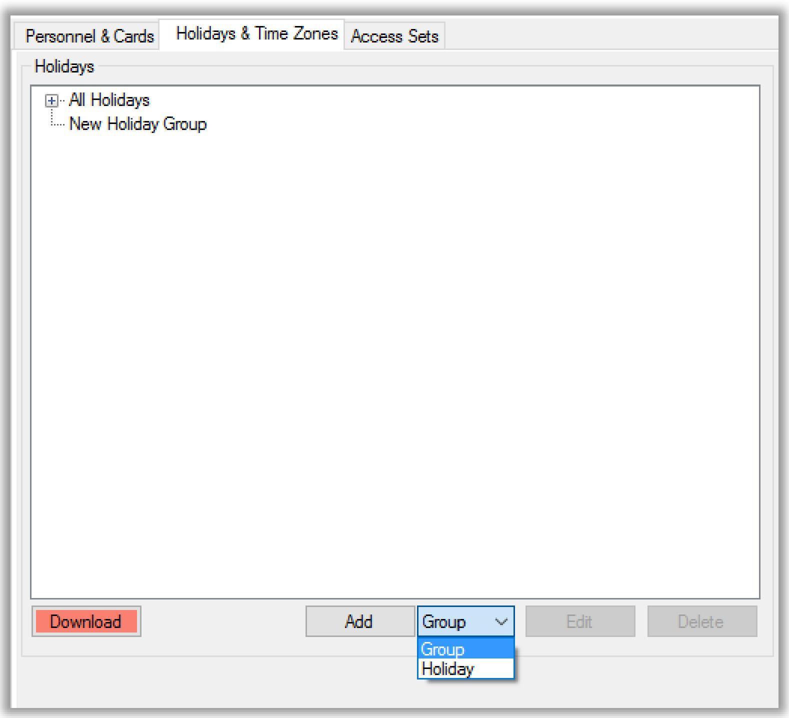

Figure 378 - The Holidays Control in Access Management View with Holiday Groups

Note: Popup/Popoff type actions on the initial screen will not be executed if the initial View is not Live View.

Figure 402 - Template Screen Object that needs programming

Open the template screen object properties dialog and map the various parameters and strings.

After creating the first screen object, *Replicate* on the screen object makes it possible to quickly create additional screen objects from the template design. *Replace Identical Objects With Template Objects* on the template design node will update existing nodes that were not made from a template to be made into template screen objects if their programming is identical.

Appendix I – Glossary

Access Management View – The Intelli–Site Lite View in which personnel, tokens, and access is managed including holidays, time zones, and access sets

Accessed – The Alarm Zone was intentionally placed in an unsecured state. Alarms generated while the alarm zone is in the Accessed state are shunted.

Accutech View – The Intelli–Site Lite View in which the Accutech system is monitored and managed.

Activity View – The Intelli–Site Lite View where the user can monitor the activity within the Intelli–Site Lite system. Activity includes valid and invalid card reads, I/O Points state changes, and system controls activities such as virtual points, counters, and constructs.

Alarm – A state change of an I/O Point that is sent to the Alarm Queue by checking **Add to Queue on High** or **Add to Queue On Low** on the ***Operation*** tab of the point's properties dialog

Alarm Zone – A security system method to manage and control a group sensors and/or conditions usually in a physical location but necessarily so

Automation Object - An I/O Point whose state is determined by a collection of I/O Points

Base Port – The Engine's TCP base port

Checkbox – Software object that can be selected by the operator or programmer

Child – A sub-folder or sub-node element in the Tree

Constructs – A software element or object that provides for a central location for related parameters or functional elements

Control Points – A point used to control a Screen Object state or that allows Actions to be executed in an Action Grid

Database – Database is used for card holder management, custom database functionality, and, optionally, event logging.

Deselect – A special Counter Value name; often used a way to programmatically set the Counter to the unselected state, 0. A Counter Value with this name is handled differently than other Counter Values in Macros.

Desktop Client – The Intelli–Site Lite software component that allows a user to interface with the Intelli–Site Lite system

Display Control Points – A point used to allow the state of a Screen Object to display

Drag-and-Drop – Using the mouse to add parameters to an object's property page or to add objects to a graphic screen. Left click on the item and hold the left mouse button down while moving the object, then release the left mouse button to drop the object.

Driver – A software construct that allows communications between the field device and the Intelli–Site Lite system.

Design View – The Intelli–Site Lite View within which the user can create graphics objects, modify the tree, and complete other project file modifications.

Documentation View – This Intelli–Site Lite View gives the user access to the system documentation and the project documentation.

Driver Service – A Windows Service used to manage communication between the Intelli–Site Lite Engine and the various Drivers which in turn communicate with the physical devices

Drop-down list – A Windows combo box that offers the user a choice of options for selection.

Engine – A Windows Service that manages the project information, controls user sessions, and manages the states of the various drivers and system constructs based on data received from sessions and field devices

Engine Redundancy – The method for ensuring high availability of the Intelli–Site Lite Engine

Event – Any function that is reported to or operated upon by the Intelli–Site Lite system; may include Alarms, tag actions, system notifications or operator actions

Field – A configurable parameter on a property page

Guard Tour – A construct to monitor a guard while on a defined tour to ensure safety and verify the guard's stopped at each location in the tour

Heartbeat – A regular signal sent by the Intelli–Site Lite system from the Engine to the other devices (Clients, Driver Service, and field devices) on the Intelli–Site Lite network. The Heartbeat is used to determine the operational status of all the devices on the network.

I/O Points – Any input to or output from the Intelli–Site Lite system

ID – The identification number assigned to each object in the tree (automatically assigned)

Live View – The primary user's interface in Intelli–Site Lite

Lock Object – A screen object that locks all other screen objects that are not also lock objects; the **Lock Object** checkbox on a State determines when and if a screen object becomes a lock; when this state is active the object becomes a lock, all other screen objects that are not locks are not selectable in **Live View** until this and all lock objects are no longer in a lock state

Lost – A token reported as lost is remembered by the system as a card assigned to a person but the Card Status is Lost. This token has no access rights and for all intents and purposes does not exist anywhere else in the system. If the token is subsequently found, it must be deleted from the person's tokens in the token table and added to the system from scratch. See Reporting a Lost Card.

Macro - A sequence of actions designed to automate a specific task or a series of tasks where they are the same, but the targets of the action can change depending on the situation

Node – All project elements (objects) are represented as nodes in the Project Node Tree

Object – Any software element in the Intelli–Site Lite project

Panel – Any field device or software object that can be communicated with by Intelli–Site Lite (e.g., a Compass IRM Panel)

Parent – Any node that has sub-nodes

Password – Project access security password

Personnel – A generic term referring to persons who will be managed via Intelli–Site Lite. Not every facility at which Intelli–Site Lite is installed is an access control facility. Card Holders are personnel.

Popup – A screen that displays, "pops-up", over the current screen

Project – Intelli–Site Lite's functional parameters are created and stored as a project

Project Directory – The subdirectory, located under the Sites directory that contains all the project file elements

Project File – Specifically, the *project.bin* file which contains the binary representation of all project data elements

Project Node Tree – The graphical representation of the Intelli–Site Lite project file; a.k.a. The Tree

Properties dialog – See **Property Page**

Property - Any user-configurable software element

Property Page – Every node has a property page with one or more tabs. These are used to configure all the functional elements of the node (a.k.a. properties dialog).

Pulse – Set an I/O Point on for its pulse duration as configured under the properties of the point and then sets the point off

Randomized Keypad – A logon password technique that populates a hexadecimal keypad in a random layout each time it is presented to the user

Reports View – This Intelli–Site Lite View allows the user to generate and examine various reports about the Intelli-System itself and the activity with said system; the reports available include System and project specific reports

RFID Management View – The Intelli–Site Lite View in which RFID tags, tag groups, and zones are managed and the current state of any tag is monitored

Scheduled Event – An I/O Point that can be programmed to set events (points) based upon time and date parameters and then clear those events when the time expires

Scheduled Events View – This Intelli–Site Lite View allows the user to manage and schedule events

Screen – A graphical interface display viewed in **Live View**

Screen Objects – Programmable graphic elements used for display and control

State - Programmed condition; an I/O Point has two states, on or off; screen objects can have any number of states

Sub-node – A child node

Shunt or **Shunted** – When a point is shunted, the point's events are not written to the Alarm Queue but to the Shunt Queue; a shunted point is said to be under manual control because a user-defined command is needed to shunt an alarm and to clear the shunt; see the **ShuntAlarm** and **ClearShuntAlarm** actions

System Monitor – A video target

T/S Keyboard – 101-key keyboard display used for touchscreen only applications

Temp – A token that is assigned to a person to be used temporarily and only for one day because their normal token was left behind. The normal token is not missing or lost. See Assigning a Temporary Card.

Template Screen Object – a screen object created using a template design node

Token – A generic term referring to any and all access credentials that can be assigned to a person

Tree – The graphical representation of the Intelli–Site Lite project

Video View – The view in which video can be displayed for any all cameras/DVRs/NVRs in the Intelli–Site Lite Project. This view is Intelli–Site Lite's implementation of the standard video monitor, multi-window displays.

View – A presentation screen that groups common logical activities. The Intelli–Site Lite user interface is divided into various Views: **Access Management View**, **Activity View**, **Design View**, **Documentation View**, **Hardware Management View**, **RFID Management View**, **Scheduled Events View**, **Reports View**, **Video View**, and **Live View**

Virtual Point – A software I/O Point

Virtualize – Set a panel to virtual view; when a panel is "virtualized", the Engine will not attempt to communicate with actual panel but will pretend the panel is there. It will appear to be online and some basic functionality may appear to work. This allows the integrator to program the project and perform basic programming without actually having the hardware in place.

Table of Figures

Revision History

2020-03-04	4.1 User's Guide Added #Database# format specifier to Database Field Control and cleaned up the explanation of each of the formats Add link to Microsoft® SQL Server® 2012 Report Builder Updated Database Field Control to add the new **Use default value** and **Default Value** fields RFID Management View and all related screen captures Added shows to screenshots of the main window for ease of viewing Updated Reports Parameters Dialog to include the special Start Date values of Today, Daily, Weekly, Monthly Lots of formatting fixes and tweaks
2020-04-09	Clarified the definition of **Days To Log** in **Access Management View** and **RFID Management View** Clarified **Owner** and **Owner Group** for a tag in **RFID Management View**
2021-7-01	Inconsistent usage of I/O Point vs IO Point. Standardizing on I/O Point. Replaced IO Point with I/O Point. Updated the Copyright. Fixed references to the supported OSes
2022-09-14	4.2 User's Guide Updated the Copyright Updated the supported OSes Added "Recreate Panel Control Screen" panel context menu item to Hardware Management View Removed "Not Yet Implemented" in reference to the Export Photos feature in Access Management View Added Guard Tour Report and Custom History Report Added ability to sort the Scheduled Events Grid by clicking on the header row Added ability to display the node address, node index, and node ID to nodes in the tree in Design View via the Client Settings dialog Added ability to filter the Alarm Queue Settings dialog Added the Lost/Temp card feature to Access Management View
2025-09-22	Updated the Copyright Updated Lost and Temp card section

	Added Lost and Temp to the Glossary
	Added Quick Status to Hardware Management View in the Quick Start Guide and the Hardware Management View sections
	Updated all Hardware Management View screen captures to include the Quick Status button as needed
	Added the behavior of the Computer node to the Evaluation Grid
	Add *Edit pg_hba.conf* to the Tools menu of the Configuration Utility
	Added button area height and width for both queue tabs in the Information Manager Layout properties
	Added How to Go To/Find in Tree for a Screen Object in the Tree in Design View
	Added Filter to Create Popup Tree View
	Added Custom History Report
	Added the action **EmailReport**
	Updated **RunReport** and **PrintReport** to include Report Settings nodes as a valid target
	Added Macros including updating Appendix II-Actions and Glossary
	Added **Clear Alarm Is Global For All Clients** on **Setup** node
	Added Templates
	Updated System Requirements
	Formatting and grammar fixes
2025-10-23	Updated Card Add Reader to include using it to add a card to a specific personnel instead of adding a new personnel and card
	Removed Not Yet Implemented from several features
	Added a space after #Database# in Database Field
2025-10-28	Updated the Reports Parameters to replace '*' with '%'
	Removed the Installation Guide and Quick Start Guide
2026-01-21	Updated Search in Access Management View to include the new behavior with Active and Deactive fields
	Added setting the background and text color in Information Manager Layouts