Enrollment Operator Guide

Avigilon™ Access Control Manager™ System

Version 6.0.0
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Introduction

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

Enrollment Operators manage identities within the system. They are responsible for creating new identities and maintaining identity records. Enrollment Operators are also responsible for creating, issuing, and printing badges. For more information, see Permissions and Rights on page 13.

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

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

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

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

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

Adding an Identity

Any person who needs access to the site managed by the ACM system or to the ACM software must have an identity record in the ACM system. A person with an identity record can be issued a badge to allow them access to the site, and a user of the ACM software can be issued a login and password.

**WARNING** — Do not add identities authenticated with pivCLASS using this procedure. You must use the pivCLASS registration system to add these identities in the ACM system. Using pivCLASS-compliant registration software to add identities to the ACM system is out of scope of this document.

To add a new identity:

1. Click **Identities**.
   The Identities Search page appears.
2. Click **Add New Identity**.
   If you have defined one or more Identity Profiles for this system, the Identity Profile dialog box will pop up:

   ![Identity Profile Dialog Box]

   - Identity Profile: **Marketing Department**

   - [OK] [Cancel]
From the **Identity Profile** drop down list, select the profile you want to assign to this identity, then click **OK**.

If you do not want to assign an identity profile to this identity, click **Cancel**.

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

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

   **NOTE:** You can add additional values to some drop down lists using the User Lists feature.

4. Click ✓.

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

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

   When the page refreshes, you are automatically taken to the Token: Add page.

6. Enter the token details as required. By default the **Download** check box is selected. This downloads the token to the connected panels and associated doors.

   When you are finished, click ✓.

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

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

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

   **NOTE:** User Defined Tabs with User Defined Fields may be added. These will display at the end of the list.
Identities - Assigning Roles

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

To assign roles to an identity:

1. Click Identities.
   The Identities Search page is displayed.
2. From the Identities Search page, perform a search for an identity.
   For more information, see Searching for an Identity on page 11.
3. Click on the name of the identity you want to edit.
   The Identity Edit screen appears.
4. Select the Roles tab.
5. From the Available list, select all the roles that you want to assign to the user, then click .
   The role is added to the Members list to show that it is now assigned.
   To remove a role from the user, select the role from the Members list, then click .
   NOTE: You can select multiple items by using the Ctrl or Shift key.
6. Click .

Identities - Assigning Tokens

Tokens are used to authenticate individuals and allow (or deny) them physical access to the access-controlled parts of your site. Tokens can be associated with access cards, biometric data (such as fingerprints), or with connected devices such as smartphones. They are part of the person's Identity record.

If someone requires access to a controlled area, they are issued a token that is associated with the type of reader and method they use to authenticate themselves. The token is then associated with an access card, fingerprint record, or app that the person can present to authenticate themselves at a reader. To further restrict access, identities can be assigned to specific roles that allow access to role-specific areas within your site.

To create tokens and assign them to an identity:
1. Click **Identities**.
   
   The Identities Search page is displayed.

2. From the Identities Search page, perform a search for an identity.
   
   For more information, see *Searching for an Identity* on page 11.

3. Click on the name of the identity you want to edit.
   
   The Identity: Edit screen appears.

4. Select the **Tokens** tab.

5. If only one token has been defined, the Token: Edit page appears.
   
   If more than one token has been defined, the Tokens list appears. Click **Add Token**.

6. Enter the details as required.

7. Click ✔️.

8. Click **Download** to download the token to the connected panels and associated doors.

9. To assign this token to a badge, select the **Badge** tab.

10. From the **Badge Token** drop down list, select the internal number you want to assign to the badge.

11. Click ✔️ (Save).

**Identities - Assigning Groups**

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

To assign groups to an identity:

1. Click **Identities**.
   
   The Identities Search page is displayed.

2. From the Identities Search page, perform a search for an identity.
   
   For more information, see *Searching for an Identity* on page 11.

3. Click on the name of the identity you want to edit.
   
   The Identity: Edit screen is displayed.

4. Select the **Groups** tab.

5. From the **Available** list, select all the groups that you want to add the user to, then click ✔️.

   The group is added to the Members list to show that the user is now a member.
To remove a user from a group, select the group from the Members list, then click

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

6. Click ✓.

## Capturing and Uploading Photos of an Identity

Capture or upload photos of a person from the Photos tab on a person’s Identity page. Then you can select a photo from this page to appear on that person's Identity page or printed on an access badge.

**Captured photo:** A photograph taken by a badge camera connected to your computer and to the ACM system, and saved in the ACM system. Captured photos are in JPG format.

**Uploaded photo:** A graphics file in JPG, PNG, GIF format that you upload from any location your computer can access and save in the ACM system. Typically, you would upload a JPG file for access badges.

**NOTE:** The Internet Explorer web browser supports only the uploading of JPG files. Do not attempt to upload any other file format if you are using the ACM client in the Internet Explorer web browser.

Photos saved in the ACM system can be cropped, resized, and rotated to meet the standardized requirements of the badge templates defined in your system.

You can use two types of cameras as a badge camera to capture a photo:

- **Local Camera** — Any camera connected directly to your computer or built into your computer or monitor.

  **NOTE:** Images cannot be captured with a local camera from an ACM client running in the Internet Explorer or Safari web browsers, or running on a mobile device.

- **IP-based camera** — Any IP-based camera previously connected to your network and added to your ACM system.

**NOTE:** Images cannot be captured with a local camera from an ACM client running in the Internet Explorer or Safari web browsers, or running on a mobile device.

Before you can:

- Use a camera to capture photos, you must specify the badge camera you want to use in your user profile. For more information, see *External Systems - Defining the Badge Camera for the System* on page 15.

- Generate and print a badge, at least one badge template must be defined in your system.

After a photo has been added to the Photos tab of an identity, you can edit the photo to suit the requirements of your badge templates. Then you can create a badge with that photo. For more information, see *Identities - Creating Badges* on page 10.

### Capturing a photo

1. There are two ways to access the Capture page:
• From the Identities Search page, click 📷 from the Image Capture column.
• From the Identities Search page, click on the name of an identity, select the Photos tab, then click Capture a Photo.

2. If you are using:
   a. A local camera that you have not used before, this page will not appear unless you allow your web browser to access your camera. The first time you access the Capture page, you are prompted to allow your browser to access your local camera. Click Allow.
   b. An IP-based camera and the camera requires authentication, this page will not appear until you have entered your login credentials.

   Enter a user name and password, then click OK.

   The Capture page appears, with the live preview from the camera showing on the right.

3. Click Capture.

   The page refreshes to show the captured photo on the left and the live preview on the right.

   A cropping overlay is imposed over the photo, The aspect ratio of the overlay is determined by the values set on the System Settings page for Badge Template Photo Height and Badge Template Photo Width.

4. Click:

   • ✔️ Save to save the photo that part of the image highlighted in the cropping overlay is saved. Cropping the photo using this aspect ratio ensures that the photo will fit exactly into the photo area on the badge without any distortion.

   • ✅ Save and Edit to save the photo and open the photo editing tool, or ✔️ Save to add the photo directly to the Photos tab.

5. On the Photos tab, select the Primary check box if you want this photo to appear on this person's
Identity page and access badge.

6. Click ✅.

**Uploading a photo**

1. From the Identities Search page, click on the name of an identity, select the Photos tab, then click Upload a Photo.

   The screen expands to include more fields.

2. Click Choose File and navigate the directory to find the photo you want to upload.

   Click Open to select the photo. You can upload files in JPG, PNG, GIF format.

3. On the Photos tab, click the Primary check box if you want this photo to appear on this person's Identity page and access badge. If no primary photo is selected, the first photo on the list is used.

4. Click ✅.

**Editing a photo**

You can edit a captured photo when you first save it by clicking ✍️ Save and Edit. You can edit any saved photo by clicking on its filename link or thumbnail photo on the Photos tab.

The photo is displayed with a brighter cropping overlay imposed over it. The overlay is preset to the Badge Photo aspect ratio. This ratio is determined by the values set on the System Settings page for Badge Template Photo Height and Badge Template Photo Width. Cropping the photo using this aspect ratio ensures that the photo will fit exactly into the photo area on the badge without any distortion.

Use the mouse in combination with the control buttons under the photo to crop, resize, rotate and flip the photo. You cannot edit the actual photo, or change its resolution by zooming in and out. The dimensions shown in the Crop Box options are read-only and cannot be entered directly, but are dynamically updated as you manipulate the cropping overlay with the mouse.

**Photo Edit**
1. Adjust the overlay.
   - To reposition the overlay over the photo:
     1. Click inside the cropping overlay.
     2. Drag the mouse to move the overlay.
   - To resize the overlay
     1. Click on the bounding frame. The mouse cursor will change to indicate the direction the overlay can be resized.
     2. Resize the overlay. The selected aspect ratio (usually the Badge Photo aspect ratio) is retained.
   - To change to a different aspect ratio:
     Click to select the required aspect ratio.
   - To resize the overlay freely:
     1. Click Free.
     2. Click on the bounding frame. The mouse cursor will change to indicate the direction the overlay will be resized.
     3. Drag the mouse to resize the overlay. The overlay will be resized only in the direction of the cursor.
   - To rotate the overlay:
     1. Click outside the current overlay.
     2. Drag the mouse to draw a new overlay.
   - To replace the overlay:
     1. Click outside the current overlay.
     2. Drag the mouse to draw a new overlay.

2. Adjust the photo.
   - To enlarge or reduce the photo:
     Use the + and - magnifier control buttons to adjust the photo size in stepped increments.
   - To reposition the photo:
     Use the up, down, left and right control buttons to adjust the photo position in stepped increments.
   - To rotate the photo:
     1. Use the counterclockwise circular arrow to rotate the photo to the left by 90°.
     2. Use the clockwise circular arrow to rotate the photo to the right by 90°.
   - To flip the photo:
     1. Use the horizontal double-ended control button to flip the photo left to right.
     2. Use the vertical double-ended control button to flip the photo top to bottom.
To reset the photo:

Use the reset control button to cancel your changes and revert the photo to its previously saved version.

3. Save the photo:

Click .

The Photos tab is displayed with the saved photo.

When you save the photo, that part of the image highlighted in the cropping overlay is saved.

**NOTE:** The saved photo replaces the original photo. The original photo cannot be restored.

**Specifying the Primary photo**

If you have several photos saved on the Photos tab, the first photo is used on that person's Identity page and is selected by default for the access badge. To use another photo instead, select the Primary check box of the photo you want.

**Deleting a photo**

To delete a photo from the Photos tab:

1. Click .

2. Click .

**Identities - Creating Badges**

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

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

To create a badge for a user:

1. Click Identities.

   The Identities list is displayed.

2. From the Identities list, click on the name of the identity you want to edit.

   The Identity: Edit screen appears.

3. Select the Badge tab.

4. From the Badge Photo drop down list, select a photo for this badge.

   Only the photos that have been previously uploaded or captured for this identity appear in this list.

5. From the Badge Token drop down list, select the token you want to associate with this badge.

   Only the tokens that have been previously defined for this user appear in this list.
6. From the **Badge Template** drop down list, select the badge template that you want to use for this badge.

   Only the badge templates that have been previously defined appear in this list.

7. Click ✔.

8. To print the badge, click **Create Badge**.

   The badge appears in a preview window.

9. Click **Print**.

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

### Searching for an Identity

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

1. The Search area is at the top of the Identity Search page. Fill out the following fields:
   - **Last Name** field.
   - (Optional) The **First Name** and/or **Internal Number** fields.
   - (Optional) The Group field.

2. Add any additional search criteria as follows:
   - Select the criteria from the **Search Field** drop down list.
   - Enter or select the value to search for in the **Search Value** field.
   - Click **Add Criteria** to add an additional search, then repeat the steps in the bullets above for each additional criteria. Add as many search filters as you need to fulfill your search criteria.
   - At any time, you can click **Clear Search** to clear all fields.
   - To remove a single criteria row, click **Remove**.

3. In the drop down list to the right of the **Search** button, select whether the values entered in the fields should be combined into a single search criteria (**And**) or used as separate search criteria (**Or**).

   If **And** is selected, only the identities that fit all entered criteria will appear. If **Or** is selected, the identities that fit one or more of the entered criteria will appear.

4. When you have entered all your search criteria, click **Search**.

   The page refreshes and displays your search results.

   **NOTE:** Always enter data in the Search Value field. Searching using blank entries will return all identities as the result.
Editing an Identity

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

To edit an existing identity:

1. Click **Identities**.
2. Search on the Identity Search screen, then click on the identity you want to edit.
   
The Identity Edit screen appears.
3. Navigate through the tabbed pages and make the required changes. The tabbed pages include:
   
   - **Identity**: use this page to edit the identity details.
     
     The default Enrollment Operator role cannot edit this page. Contact your System Administrator for more details.
   
   - **Roles**: use this page to assign a role to this identity.
   
   - **Tokens**: use this page to create a token for the identity.
   
   - **Groups**: use this page to assign this identity to a group.
   
   - **Capture**: use this page to take a photo of the user.
   
   - **Photos**: use this page to upload an existing photo of the user.
   
   - **Badge**: use this page to assign a badge to this user.
   
   - **Timed Access**: use this page to assign timed access to this user.
   
   - **Access**: use this page to view this identity's access privileges including roles, access groups, and doors.
   
   - **Transactions**: use this page to view past alarms and events that were triggered by this user.
   
   - **Audit**: use this page to view a log of all the changes that have been made to this identity.

**NOTE**: User Defined Tabs with User Defined Fields may be added. These will display at the end of the list.

**NOTE**: Remember to click ✔️ to save the changes on each page.
# Permissions and Rights

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

<table>
<thead>
<tr>
<th>Permissions</th>
<th>Rights</th>
</tr>
</thead>
</table>
| Add new identities. Cannot update fields after initial identity setup | Identities My Account  
Identities Listing  
Identities Show  
Identities Advance Search  
Identities Date Search  
Identity Profiles Listing  
Identity Profiles Show List  
Identities New  
Identities Create  
Identities Edit  
Identity Profiles Populate Values |
| Add, modify, and update available roles | Identities Roles List  
Identities Roles Update |
| Add, modify, and update tokens | Tokens Listing  
Tokens Show  
Tokens New  
Tokens Create  
Tokens Edit  
Tokens Update  
Tokens Set Free Pass  
Identity Profiles Tokens Listing |
| Add and modify groups | Identities Groups List  
Identities Groups Update |
| View assigned access permissions | Identities Show Access  
Identity Profiles Show Access |
<table>
<thead>
<tr>
<th>Permissions</th>
<th>Rights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capture live photos and save</td>
<td>Identities Image Capture</td>
</tr>
<tr>
<td></td>
<td>Identities Image Save</td>
</tr>
<tr>
<td></td>
<td>Identities Code Image</td>
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<tr>
<td></td>
<td>Identities Photo Capture</td>
</tr>
<tr>
<td>Add and upload photos</td>
<td>Identities Photo Edit</td>
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<tr>
<td></td>
<td>Identities Photo Update</td>
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<tr>
<td></td>
<td>Identities Photo Render</td>
</tr>
<tr>
<td></td>
<td>Identities Upload Photo</td>
</tr>
<tr>
<td>View transactional data</td>
<td>Identities Transactions</td>
</tr>
<tr>
<td>Print and issue badges</td>
<td>Identities Badge Show</td>
</tr>
<tr>
<td></td>
<td>Identities Badge Screen</td>
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<tr>
<td></td>
<td>Identities Print Badge</td>
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<tr>
<td></td>
<td>Identities Badge Render</td>
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<tr>
<td></td>
<td>Identities Update Badge Preview</td>
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<tr>
<td></td>
<td>Identities Update Badge</td>
</tr>
</tbody>
</table>
External Systems - Defining the Badge Camera for the System

Once all cameras or other imaging devices have been added as part of an external system, you can set which camera to use when creating badges for identities.

1. Select > My Account.
2. Under the Profile tab, select a camera from the Badge Camera drop down list:
   - **Local Camera** — Any camera connected directly to your computer or built into your computer or monitor.
     
     **NOTE:** Images cannot be captured with a local camera from an ACM client running in the Internet Explorer or Safari web browsers, or running on a mobile device.
   - **IP-based camera** — Any IP-based camera previously connected to your network and added to your ACM system.
3. When you're finished, click ✓.

Next time you create a badge, the selected camera is used to take the identity photo.