DOORS
FORTESSA

Software Manual

Table of Contents

1.   Getting Started

Symbols Used in this Manual

	This is a step in the current task
	Highlights an area of the Doors Fortessa interface
	This feature is only available to an Administrator
	This feature is only available in the Professional version

PC Specification

|	
RAM	Minimum: 512 MB Recommended: 1 GB or higher depending on the operating system
Hard Disk space	800 MB free space
Processor	Pentium III Compatible or higher Minimum: 500 MHz Recommended: 1 GHz or higher
Internet Requirements	Microsoft Internet Explorer 6.0 SP1 or later (prerequisite for .NET Framework)
Prerequisite software	Microsoft .NET Framework 2.0 SQL Server Setup requires Microsoft Data Access Components (MDAC) 2.8 SP1 or later. You can download MDAC 2.8 SP1 from this Microsoft Web site.
Supported operating systems	Windows Vista Business Windows Vista Enterprise Windows Vista Ultimate
	Windows XP professional SFORTESSA
	Windows Server 2003 Enterprise Edition SP1 Windows Small Business Server 2003 Standard Edition SP1 Windows Small Business Server 2003 Premium Edition SP1
	Windows 2000 Professional Edition SP4 Windows 2000 Server Edition SP4 Windows 2000 Advanced Edition SP4
	Trade mark acknowledgment: These product names are registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

Logging In as a Different User

1 From the login screen, select **Use a different login.**

2 Select the desired user.
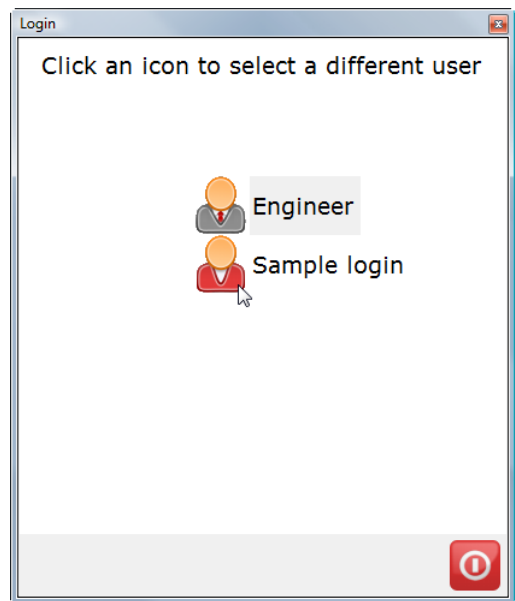
3 Enter the password. Click to log in.

Adding Doors and Cards Using the Setup Wizard

After logging in for the first time, the **Setup Wizard** is shown. This provides a simple way to locate doors and add cards to the system.
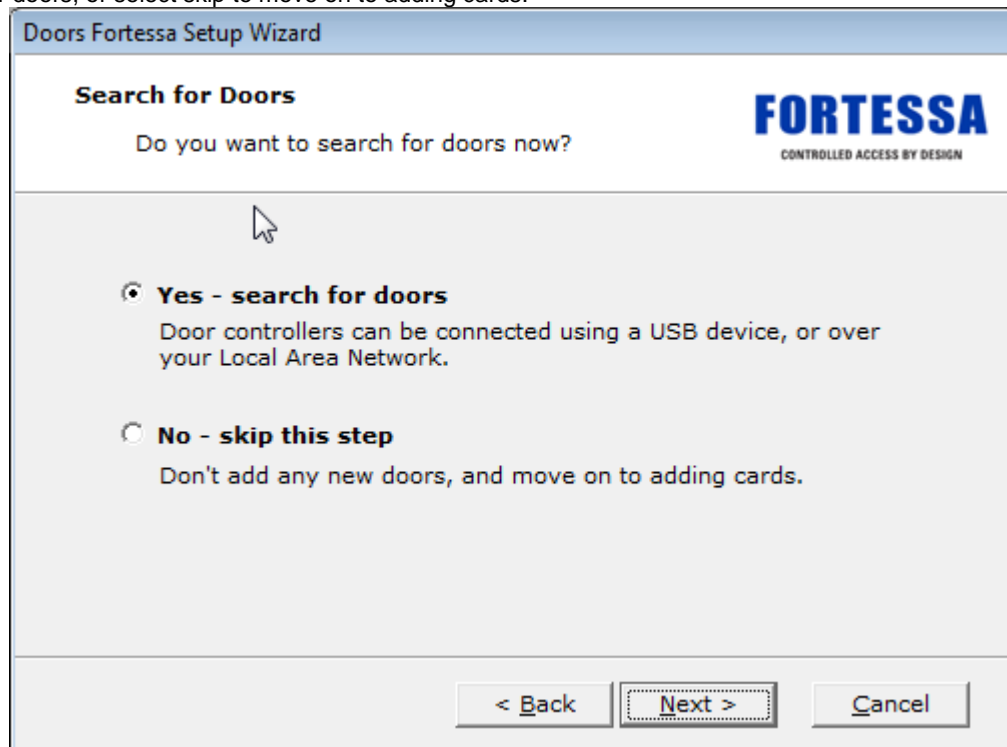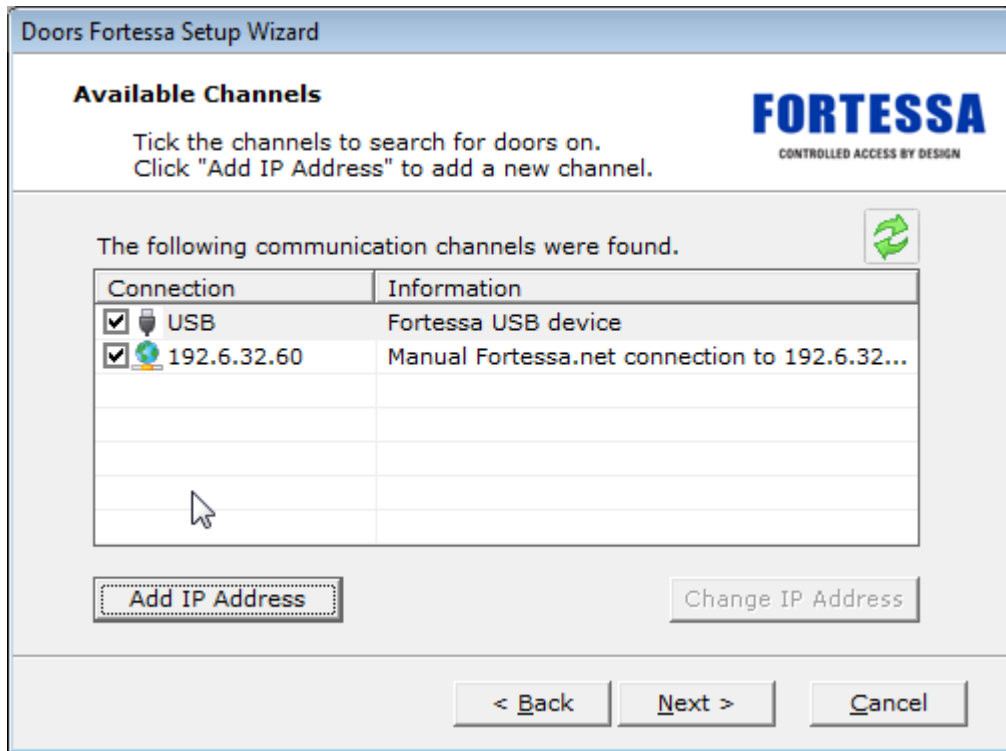
1 Start the wizard by clicking **Next.**


2 Search for doors, or select skip to move on to adding cards.

3 Doors Fortessa will check the available hardware channels. For additional IP addresses, use the "**Add IP Address**" button.


Please note:

- FORTESSA.net controllers located on your subnet will **automatically** be found.

- IP addresses for controllers located on a different subnet must be added using the "**Add IP Address**" button.

- For automatically found channels "**Change IP Address**" button will update the IP Address of both the FORTESSA.net device and any associated controllers.

- For manually added channels, "**Change IP Address**" will simply change the address to search on.

- Information about the server and subnet is displayed when adding or changing an IP address.
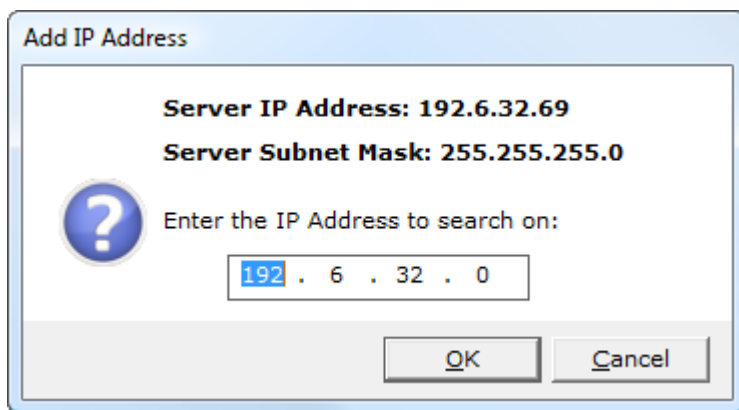
4 Newly located doors will be added to the list. A message will appear when the scan is complete.
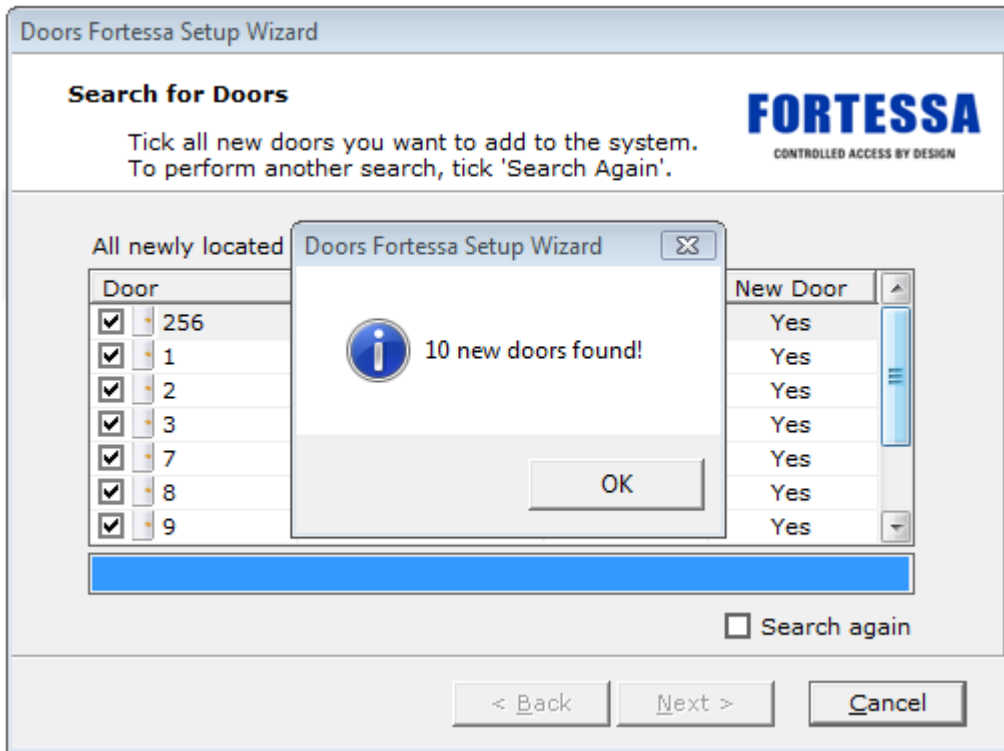
5 Select **Yes** to begin adding cards, or **No** to skip and complete the wizard.

6   Enter the details of the cardholder. Present a card to the **Registration Reader** or **Door** if required. Click **Add Card Details.** Repeat to add all required cards. Note that all available cards do not need to be added in at this time.

Doors Fortessa Setup Wizard

Add Card Records

Do you want to add card records?

FORTESSA
CONTROLLED ACCESS BY DESIGN

Read card ID from	Progeny USB desktop reader
Card ID	00013587
First name	Bert
Last name	Ernest
Enabled	☑
Access level	All Doors

Add Card Details

< Back   Next >   Cancel

7   Review the list of newly added cards. Click **Next.**

Doors Fortessa Setup Wizard

Newly Added Cards

Tick all cards you want to add to the system.
To add another card, tick 'Add another'.

FORTESSA
CONTROLLED ACCESS BY DESIGN

Card ID	First Name	Last Name	Enabled	Access Level
☑ 00007862	John	Smith	Yes	(none)
☑ 00013587	Bert	Ernest	Yes	All Doors

☐ Add another

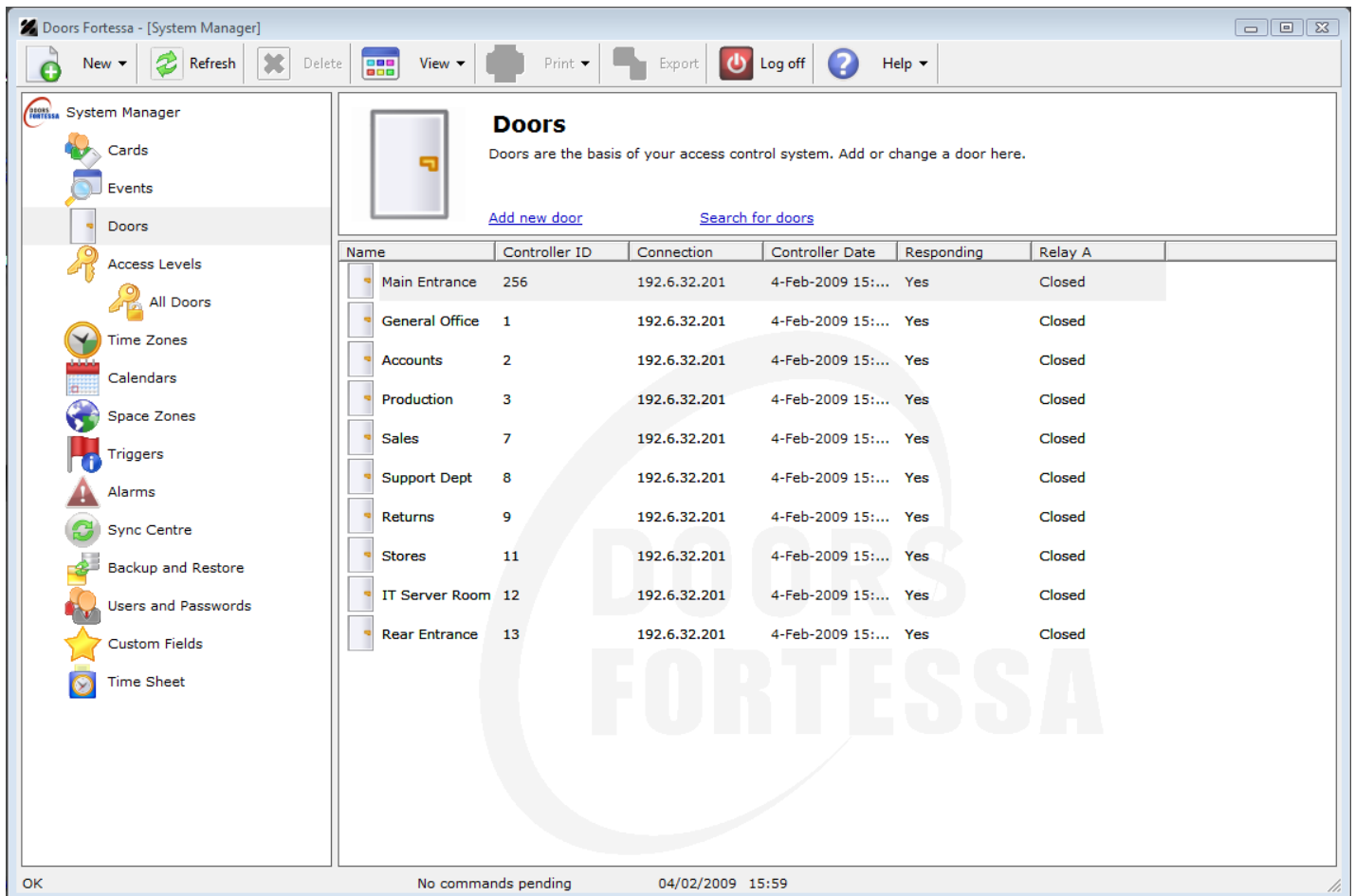< Back   Next >   Cancel

8   Click **Finish** to add the new doors and cards.
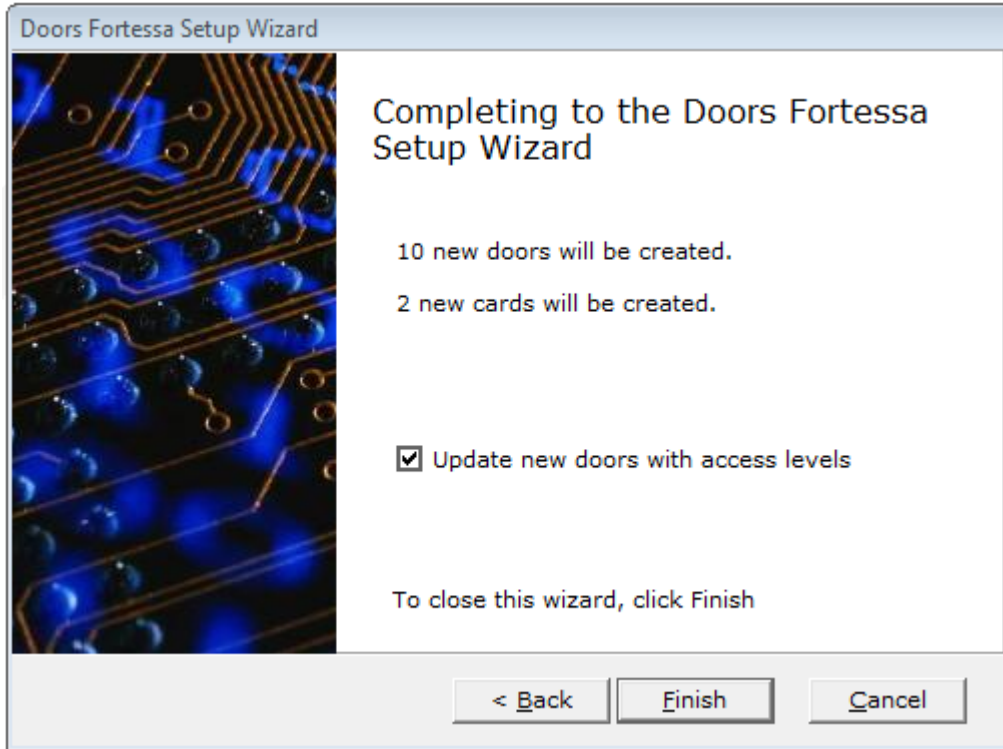
9   Right-click **Doors** from the System Tree, and select rename.

The Doors Fortessa Interface

① Toolbar

Click the toolbar to perform common tasks such as:
- Adding and removing items
- Printing and exporting reports

② Task Panel

- Shows information on the current section
- Provides shortcuts to useful tasks for that section.

③ System List

- Gives details of the currently selected item

④ System Tree

- Shows the available areas of the Doors Fortessa software

Adding, Changing and Deleting Items

Adding Items

Items can be added by:

1   Clicking the **New** Tool Bar button

2   The right-click menu on the System Tree

3   Clicking the **Add New** shortcut
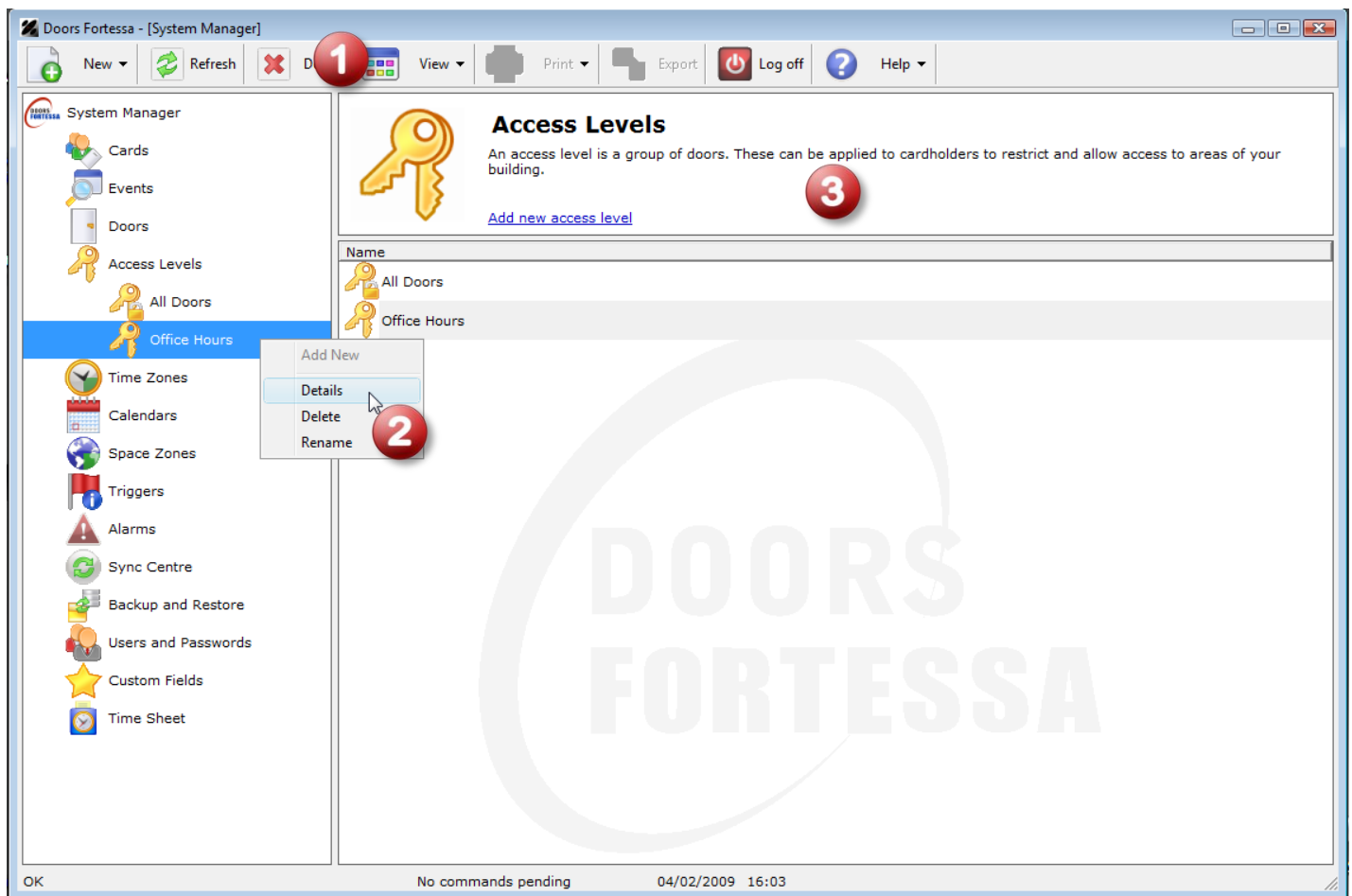
Changing Items

1 **Rename** or view **details** from the System Tree right-click menu

2 Double-click an item in the System Tree or System List

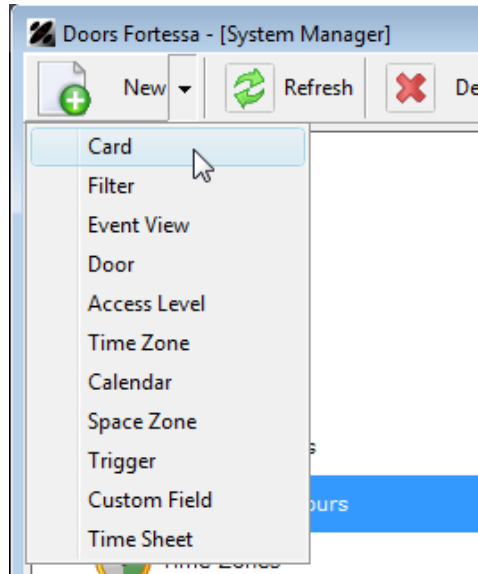**3** Click **Delete** from the Tool Bar to remove an item

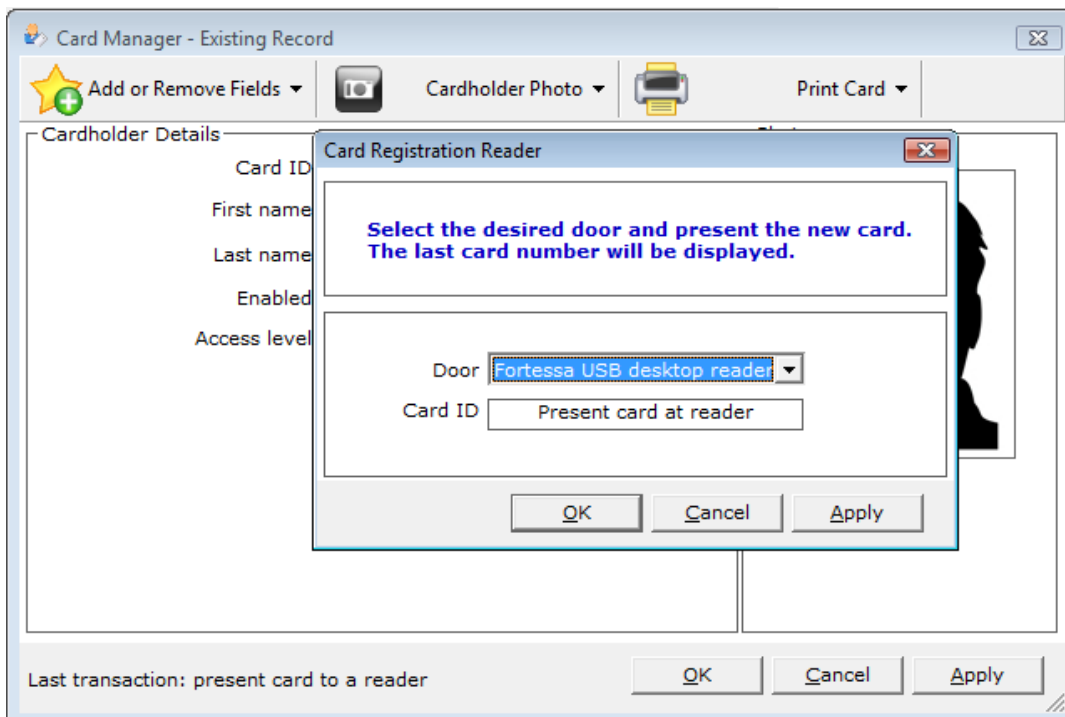# 2. Updating Cards in Doors Fortessa

Adding a Card

1 Select **Card** from the **New** list on the **Toolbar**

2 Enter the **Card ID** (this is an 8 digit number printed on the card), or select the ![...] button to present a card to a door or desktop reader.

3

Enter the **Cardholder Name**. Tick **Enabled** and select **All Doors** from the **Access Level** list**.**
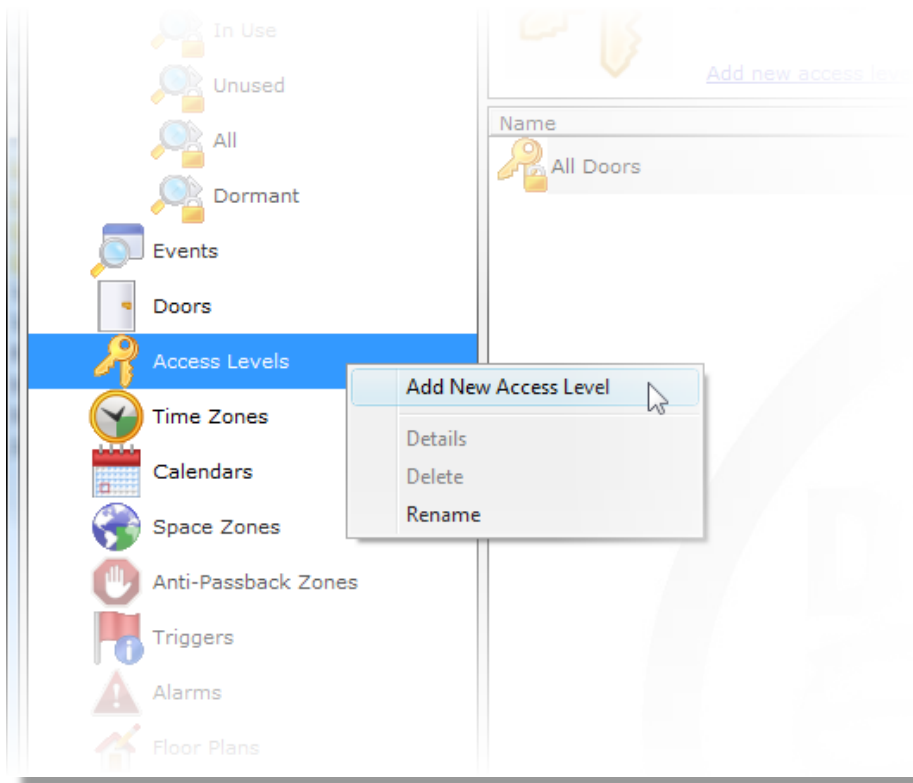

4

Click **OK**. The card will now open all doors.

Restricting Card Access by Door

An **Access Level** is a group of doors. These can be applied to cardholders to restrict and allow access to areas of your building.
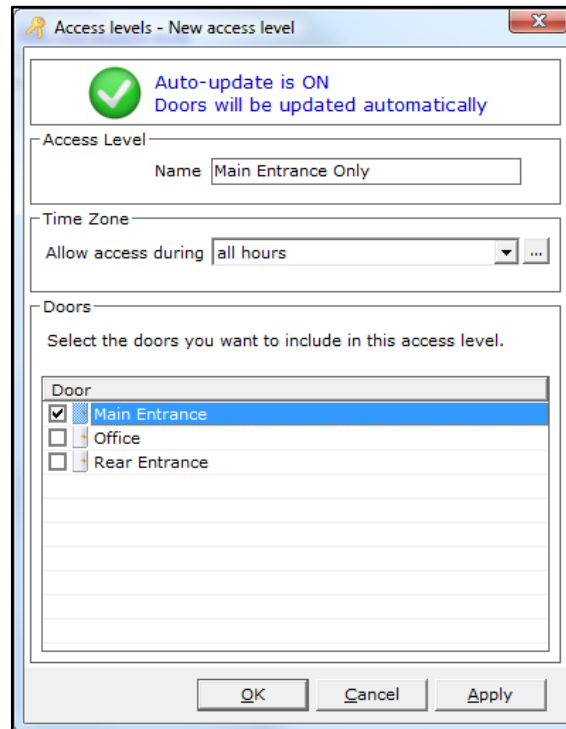
1 Create a new access level by right-clicking **Access Levels** from the **System Tree,** and selecting **Add New Access Level.**
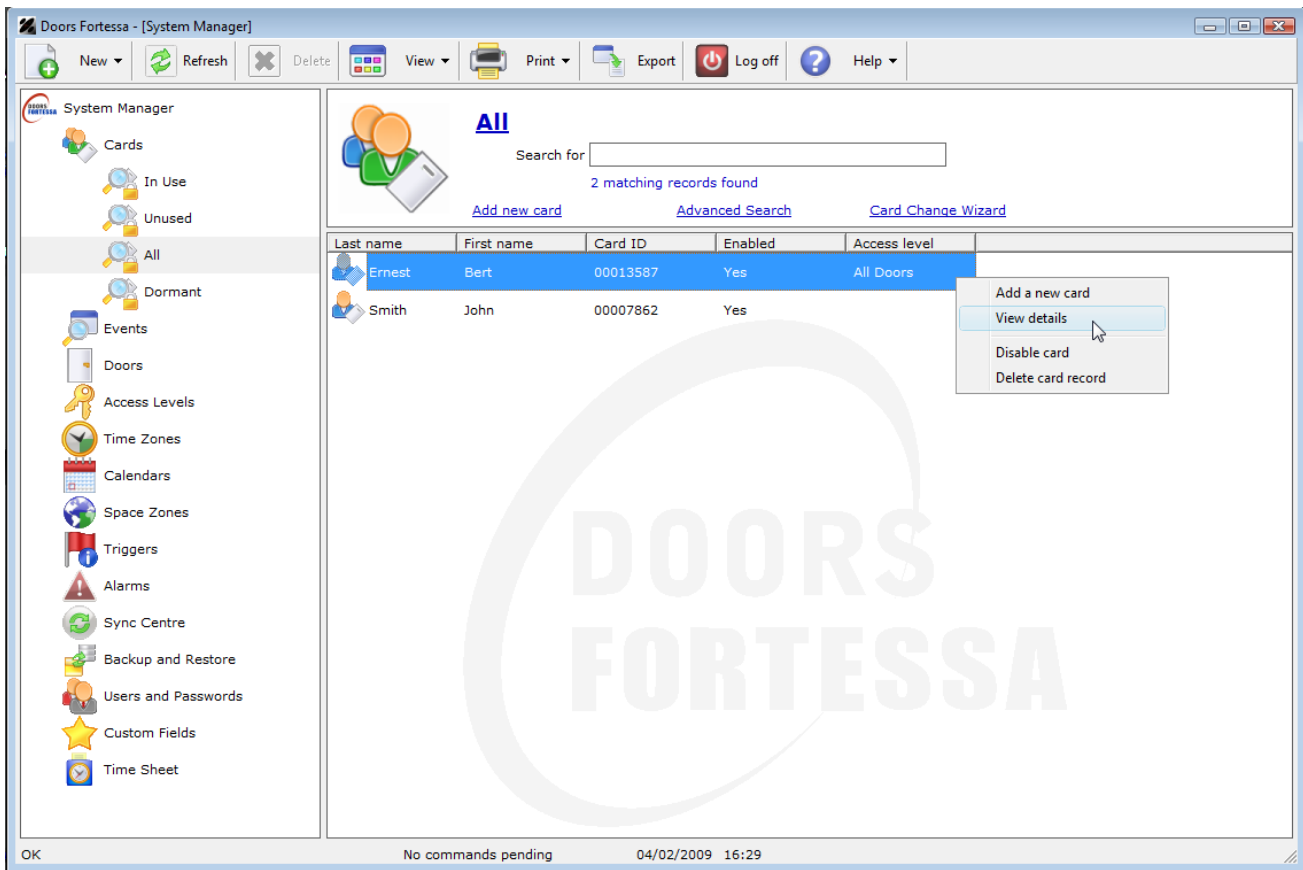

2 Enter the access level name and tick the required doors. In the below example, only the Main Entrance door is included.
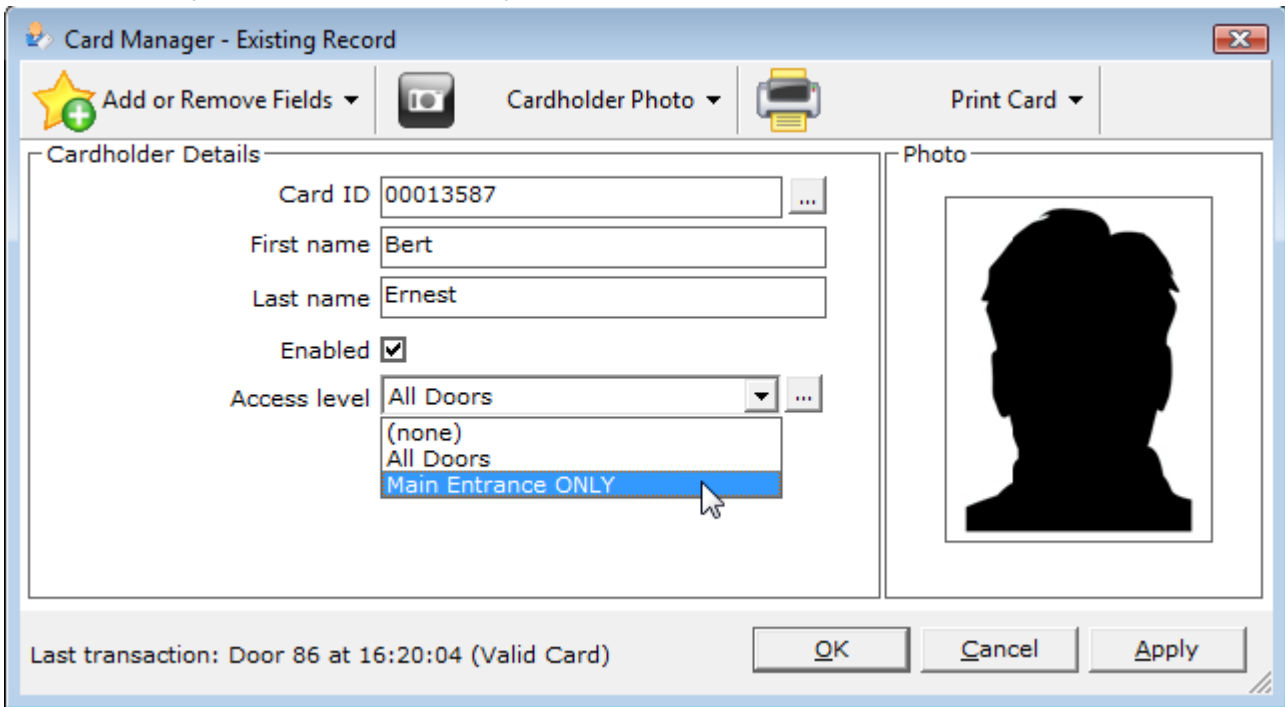
3 Find the card by selecting **Card Manager**, then **All.** Right-click the card, and select **View Details.**

4 Select the newly created "Main Entrance Only" access level from the list. Click **OK** to save.
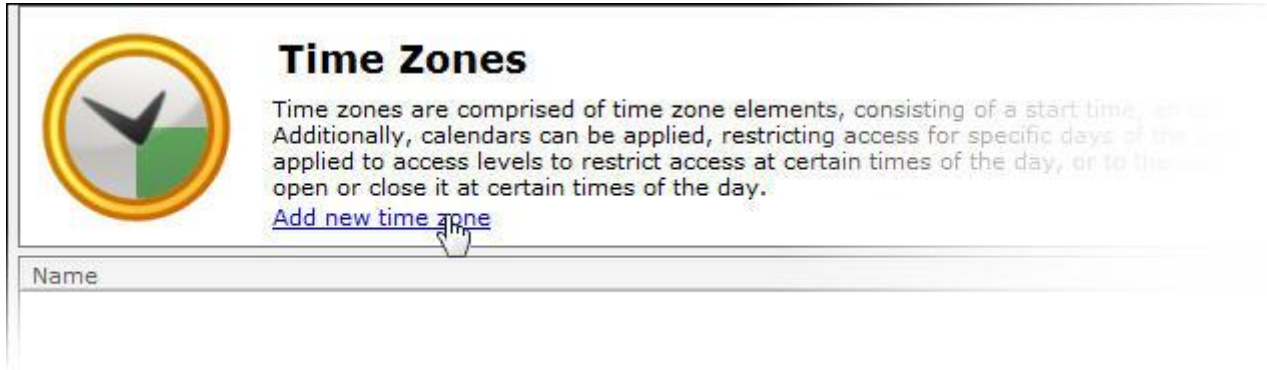
Restricting Card Access by Time

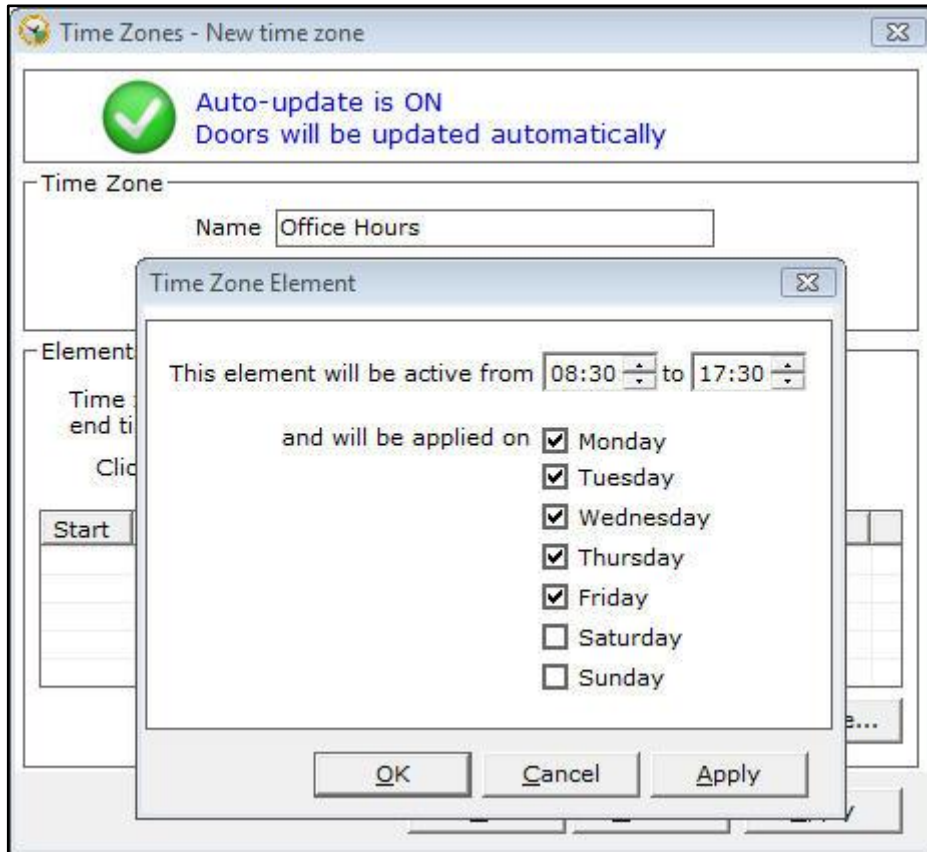**Time zones** can be applied to access levels to restrict access to cardholders at certain times of the day.

1
Create a new **Time Zone** by clicking **Time Zones** from the **System Tree,** and selecting **Add new time zone** from the Information bar**.**

2
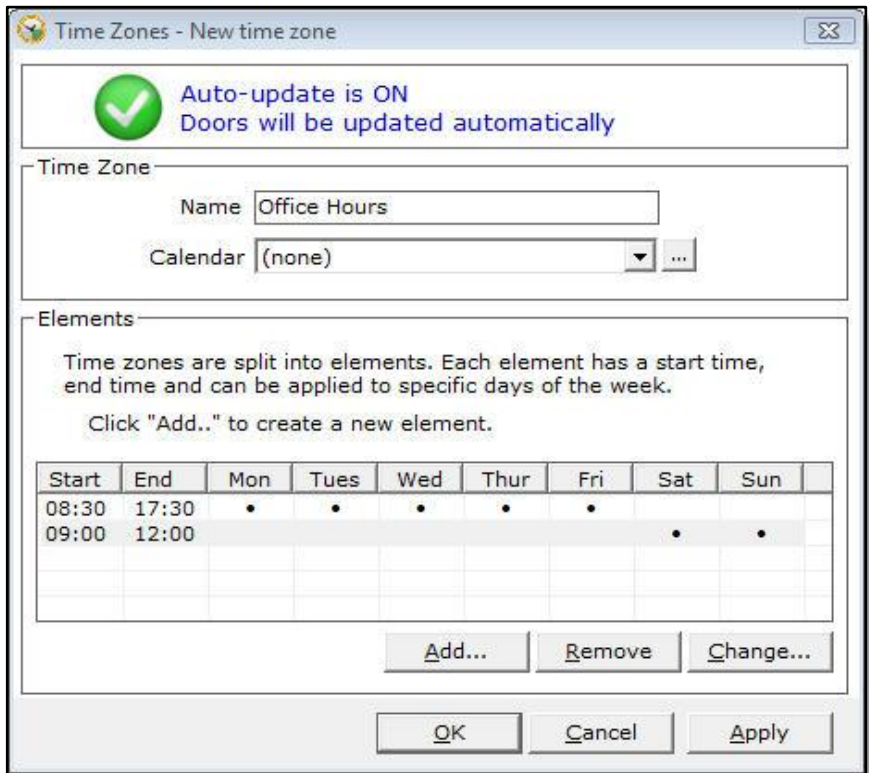Enter the time zone name. Attach an **Element** to the time zone by clicking **Add**.

3
Enter the required start and end times, and the days this element applies to. Click **OK**.
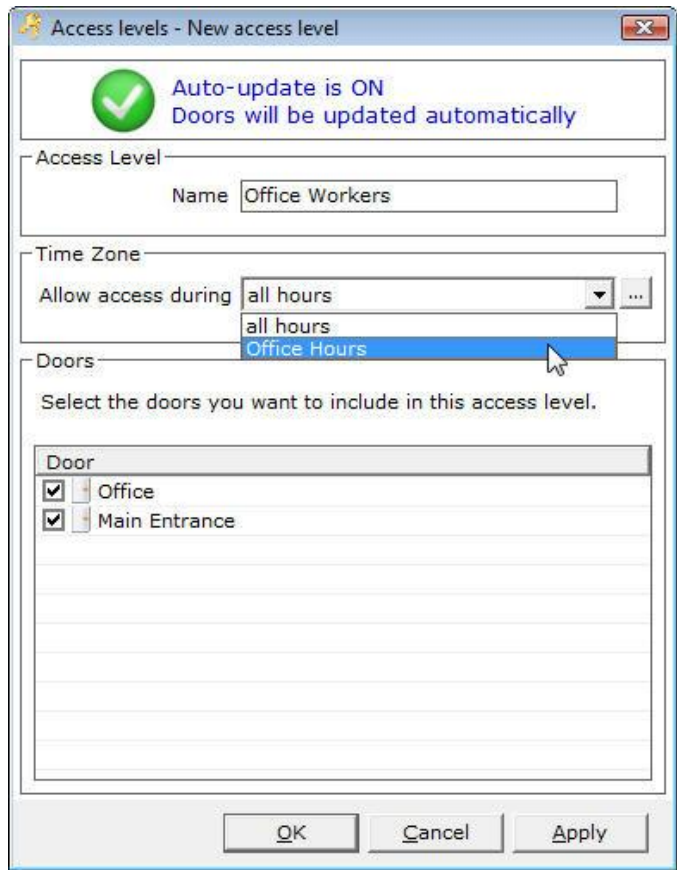
4

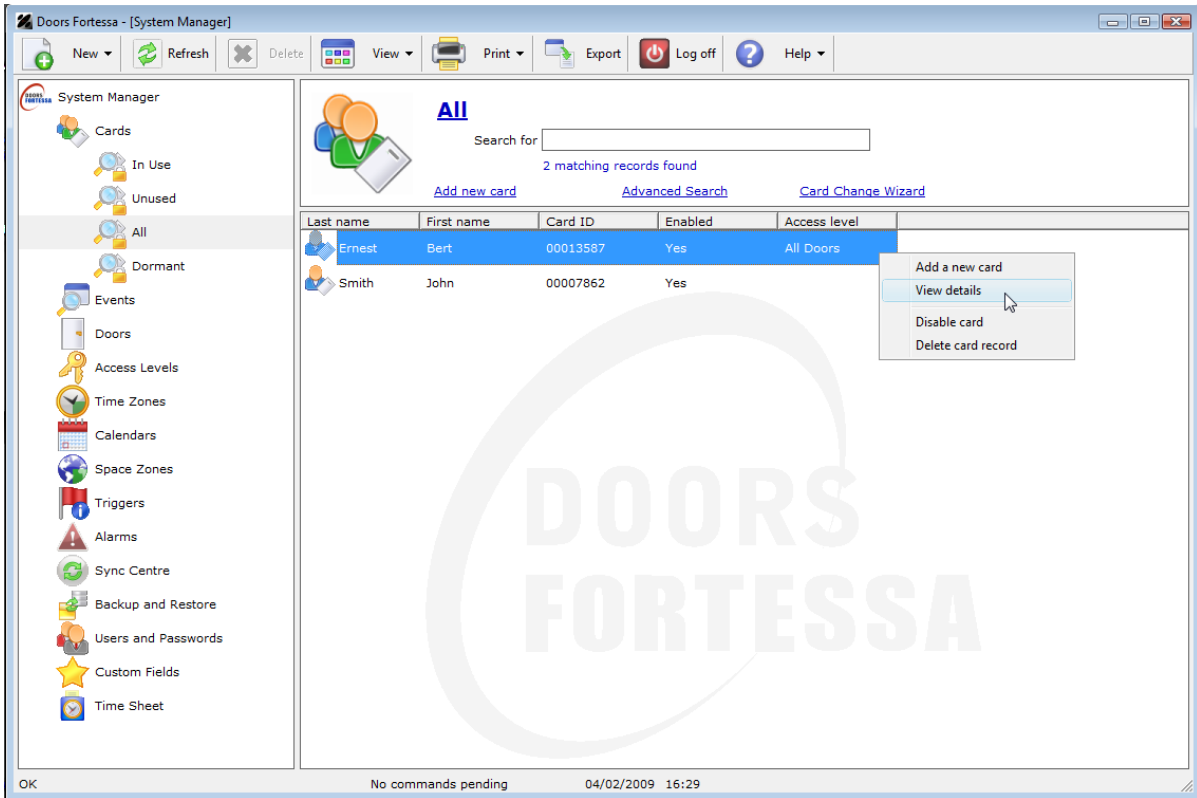Repeat steps 2 and 3 to add additional **elements,** and click **OK** to save.

5

Create a new Access Level (as described in **Restricting Card Access by Door),** selecting the newly created time zone from the list.
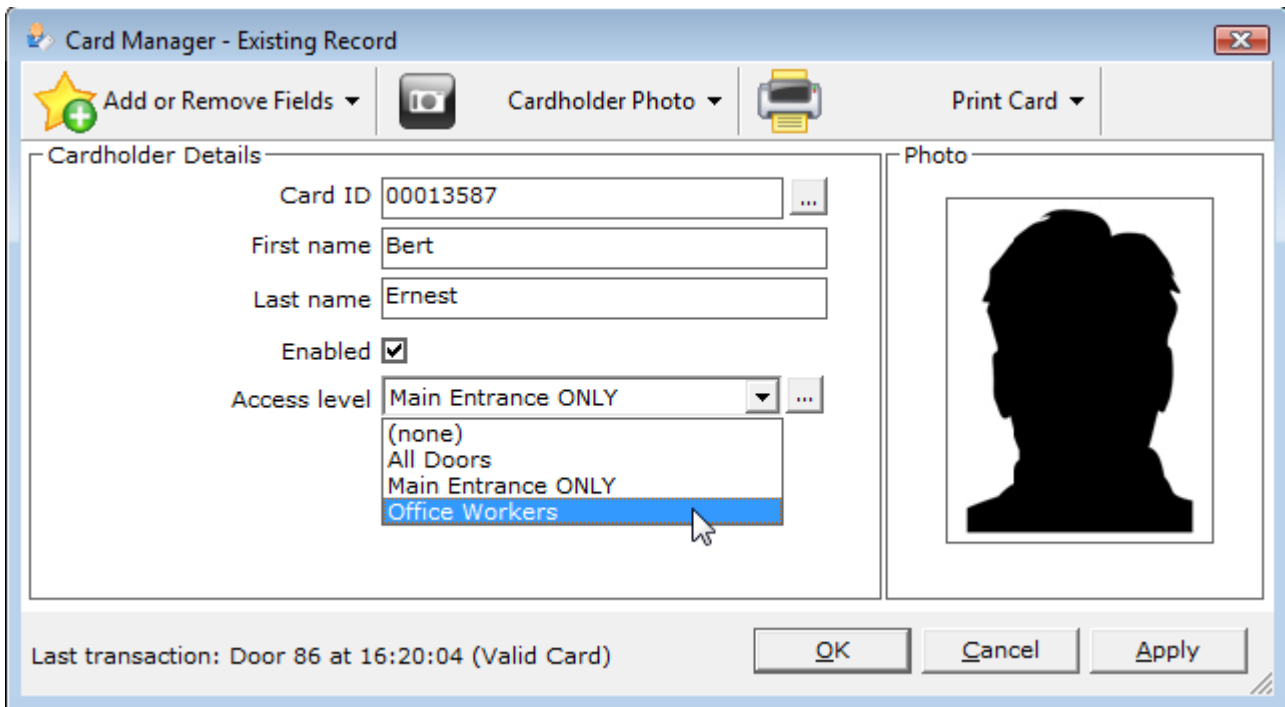
6

Find the card by selecting **Card Manager**, then **All.** Right-click the card, and select **View Details.**

7

Select the newly created "Main Entrance Only" access level from the list. Click **OK** to save.

Restricting Card Access by Date

The use of **Calendars** can further restrict access. **Calendars** consist of **exception days**. These are applied to **Time Zones,** which in turn can be applied to **Access Levels** or used to release the door lock.

1   Create a new **Calendar** by clicking **Time Zones** from the **System Tree,** and selecting **Add new time zone** from the Information bar**.**

Calendars

Calendars are groups of dates. These can be applied to time zones, restricting access on certain days.

Add new calendar

Name

2   Enter the calendar name. Use the `<` and `>` buttons to move forward and back.
In the below example, UK Bank Holidays have been selected. Click **OK** to save.

Calendars - New Calendar

Auto-update is ON
Doors will be updated automatically

Calendar

Name Bank Holidays

2008 (Jan–Jun)

January	February	March
Mo Tu We Th Fr Sa Su	Mo Tu We Th Fr Sa Su	Mo Tu We Th Fr Sa Su
1 2 3 4 5 6	1 2 3	1 2
7 8 9 10 11 12 13	4 5 6 7 8 9 10	3 4 5 6 7 8 9
14 15 16 17 18 19 20	11 12 13 14 15 16 17	10 11 12 13 14 15 16
21 22 23 24 25 26 27	18 19 20 21 22 23 24	17 18 19 20 21 22 23
28 29 30 31	25 26 27 28 29	24 25 26 27 28 29 30
		31

April	May	June
Mo Tu We Th Fr Sa Su	Mo Tu We Th Fr Sa Su	Mo Tu We Th Fr Sa Su
1 2 3 4 5 6	1 2 3 4	1
7 8 9 10 11 12 13	5 6 7 8 9 10 11	2 3 4 5 6 7 8
14 15 16 17 18 19 20	12 13 14 15 16 17 18	9 10 11 12 13 14 15
21 22 23 24 25 26 27	19 20 21 22 23 24 25	16 17 18 19 20 21 22
28 29 30	26 27 28 29 30 31	23 24 25 26 27 28 29
		30

OK   Cancel   Apply

3   Apply the **Calendar** to a **Time Zone** by opening an existing time zone or creating a new one. Click **OK** to save the **Time Zone.** This can now be applied to an access level or lock relay to restrict access on the specified **Exception Days.** This is shown in Restricting Card Access by Door and Release a Door During the Day.

5   Create a new Access Level (as described in **Restricting Card Access by Door**)**,** selecting the newly created time zone from the list.
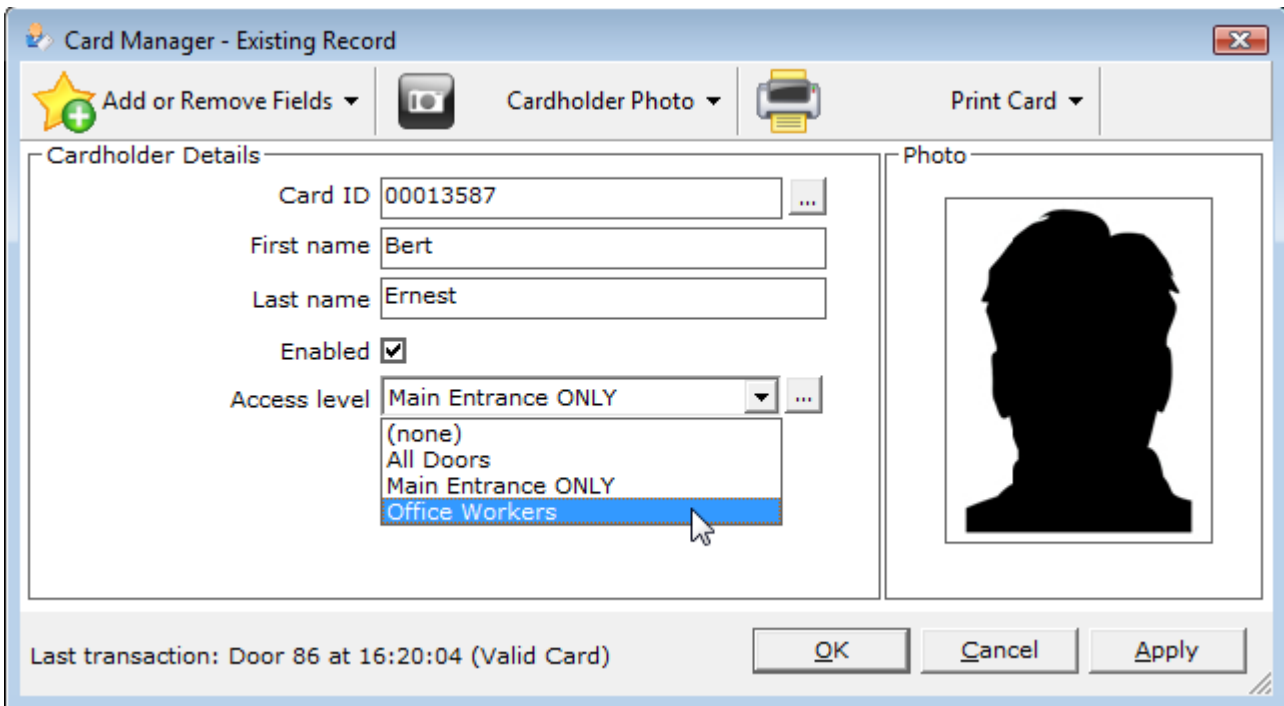
6

Find the card by selecting **Card Manager**, then **All.** Right-click the card, and select **View Details.**

7
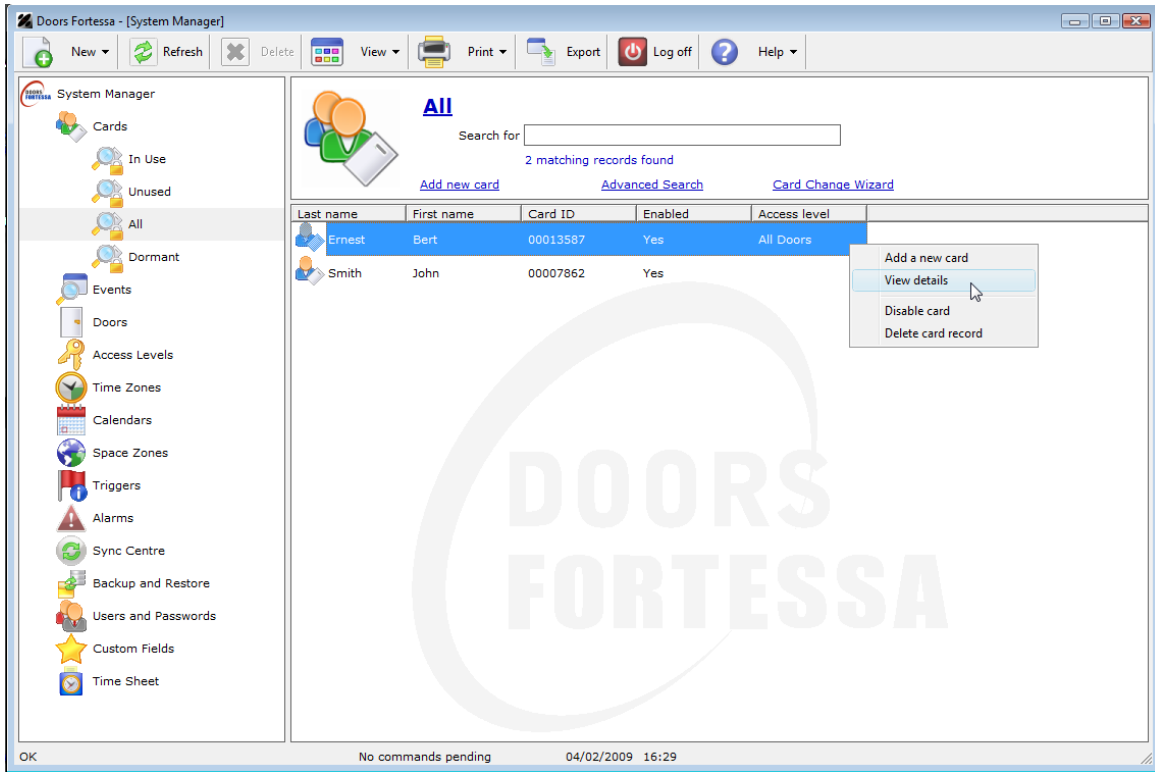
Select the newly created "Main Entrance Only" access level from the list. Click **OK** to save.

Customising Card Manager

Card Manager shows the basic information required to enable or disable a card – **Card ID, Name, Access Level** and **Enabled.** More items can be added to the **Card Manager** screen. These are split into two sections: **Standard Fields** and **Custom Fields.**

Standard Fields are additional card information that can be displayed and affect the behaviour of a card. These are:

- **Dormant** – a card can be automatically be disabled if it hasn't been used for a period of time. This is detailed further in Disabling Cards Using Dormant Card Policy.

- **Valid From** –Specify a date when a card can be used from.

- **Valid To** –Specify a date when a card can be used to.

- **PIN** – *Personal Identification Number* used for Card and PIN systems.

- **Current APB Zone** – the current **Anti-Passback Zone** of the cardholder. See Using "Anti-passback" to encourage correct system usage for more information.

- **Second Access Level –** a cardholder can be given two access levels if required.

Custom Fields are created by the end-user, and are intended to contain information about the cardholder. Up to 25 Custom Fields can be created. There are five types of custom field:
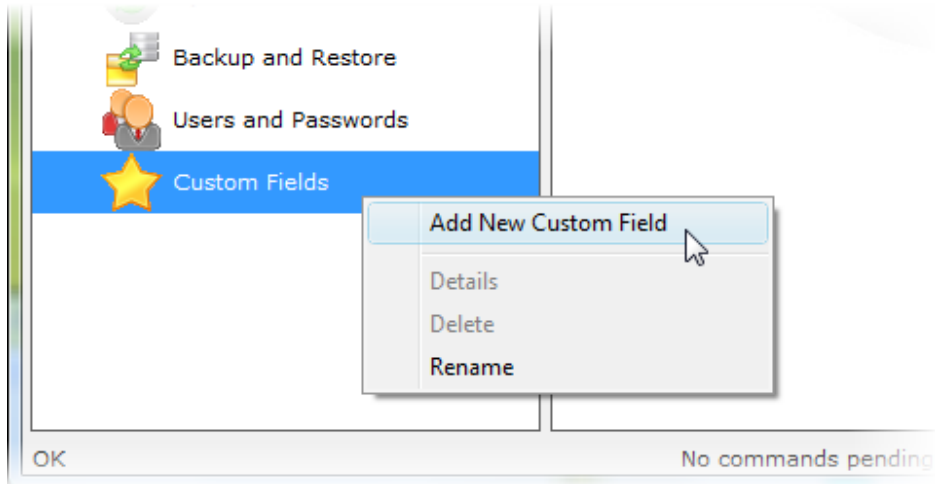
- **Checkbox**

- **Drop-down list**

- **Date**

- **Text**

- **Number**

Creating Custom Fields

In the following example, a a drop-down list for "Department" will be created. This will be added to the card manager screen in Changing the Card Manager Display
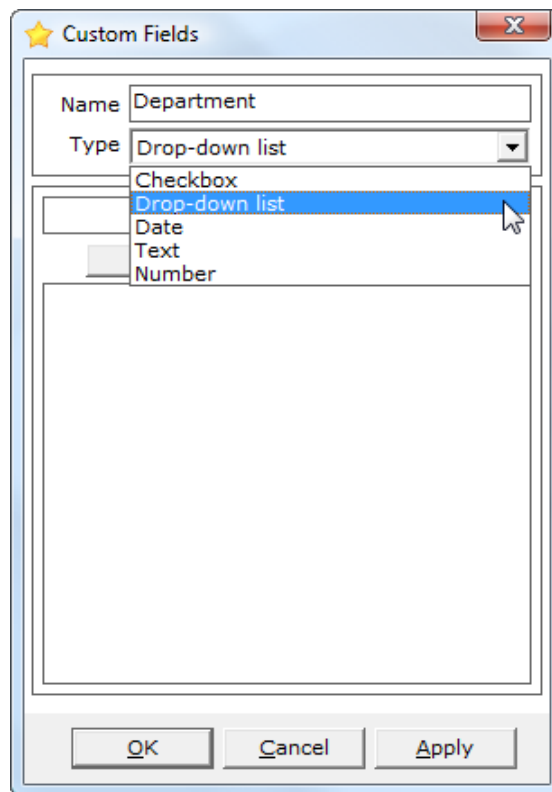
1 Add a new custom field by right-clicking Custom Fields in the System Tree.

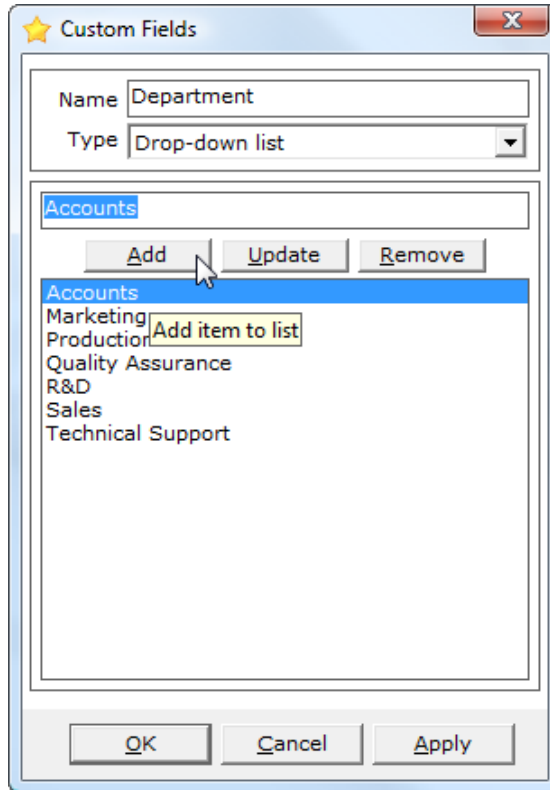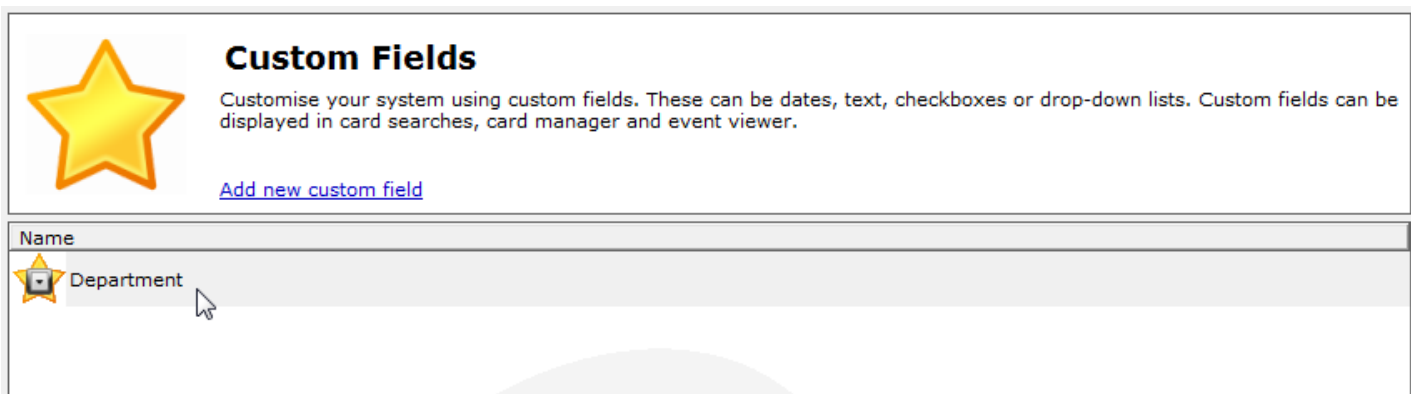**2** Enter the name, and select the custom field type.

3 Add entries to the list by clicking the **Add** button.
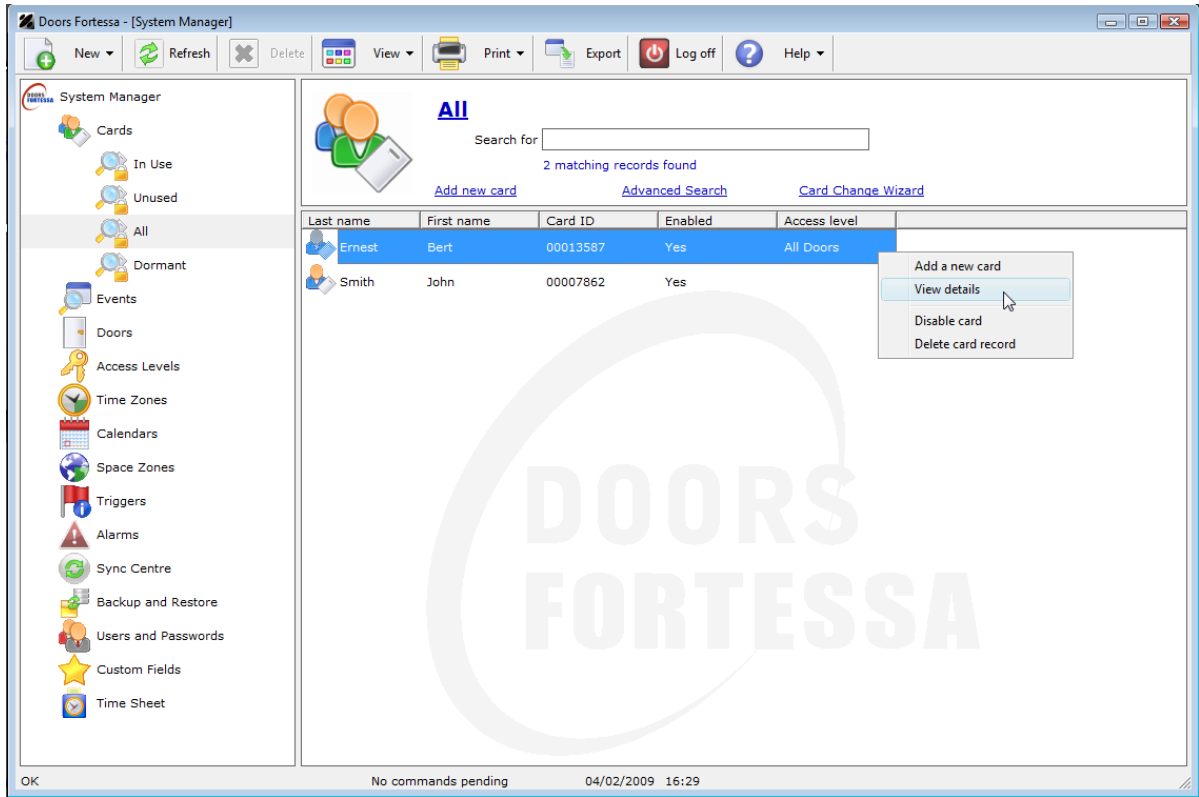

4 Click **OK** to save.

Changing the Card Manager Display

In the following example, the custom field created in [Creating Custom Fields](#), along with the Dormant checkbox (see [Disabling Cards Using Dormant Card Policy](#)) will be added to the card manager screen.
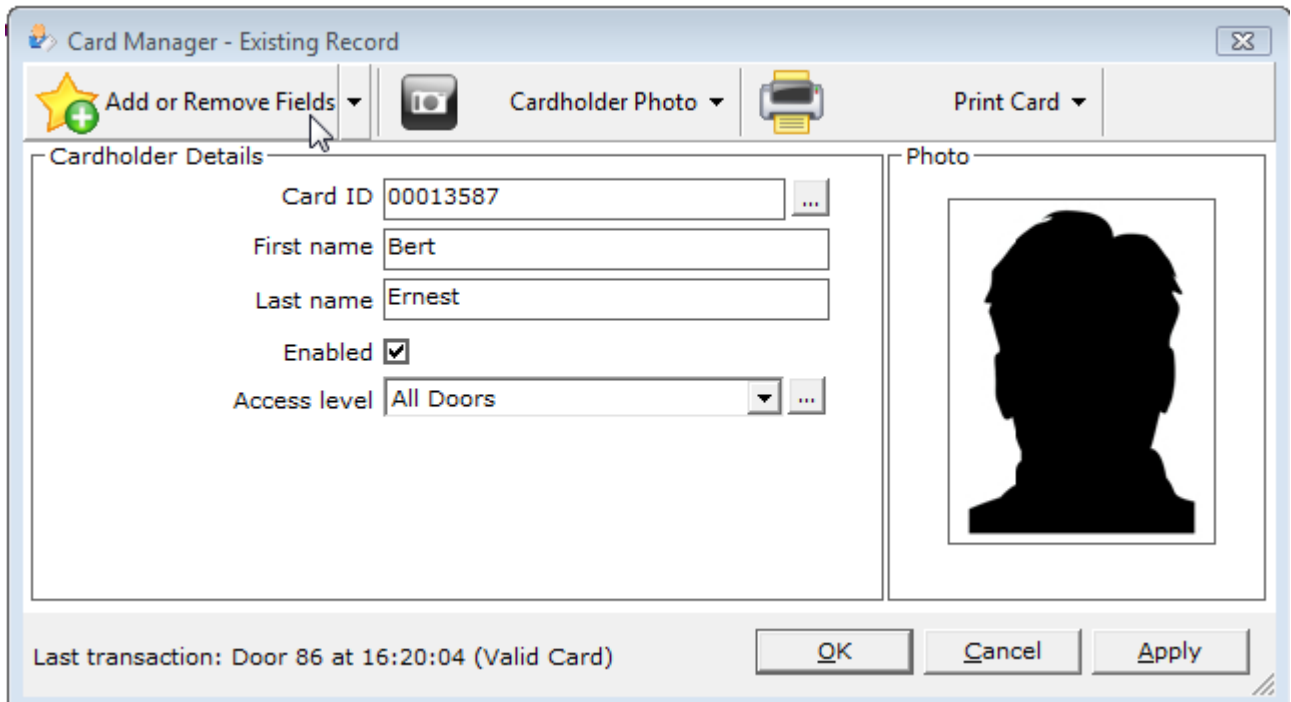
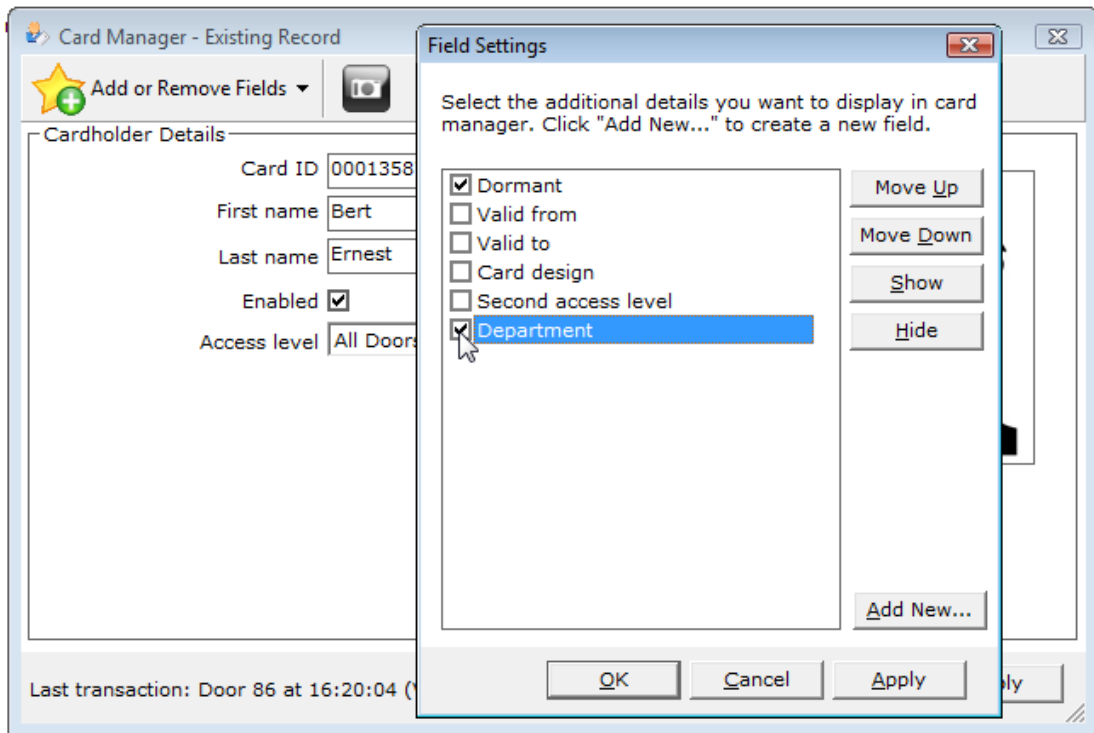**1** Open the **Card Manager** screen by right-clicking a record in the [System List](#).

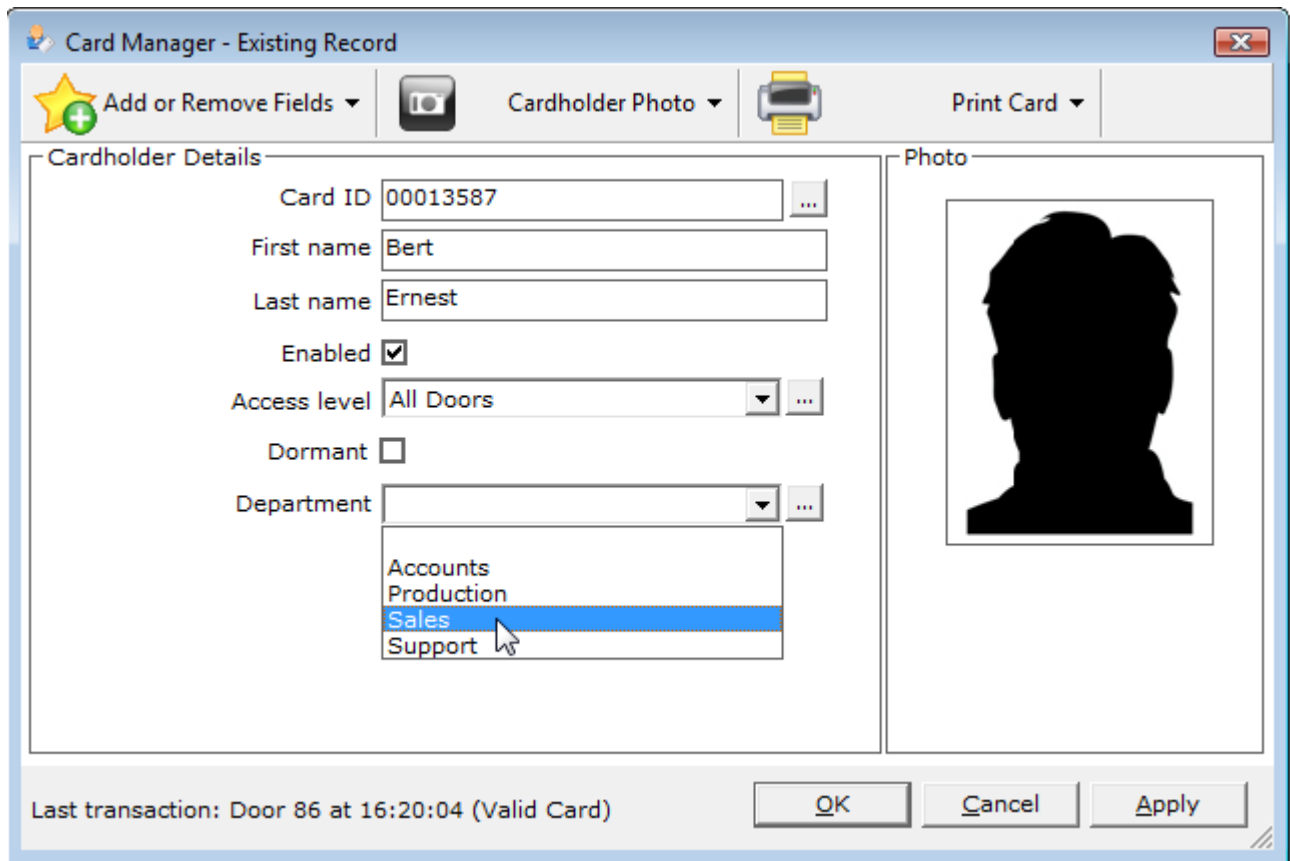**2** Click **Add or Remove Fields** in the toolbar.

3 Tick the fields to be included. Click **Add New** to create a new custom field if required. Click OK when finished.
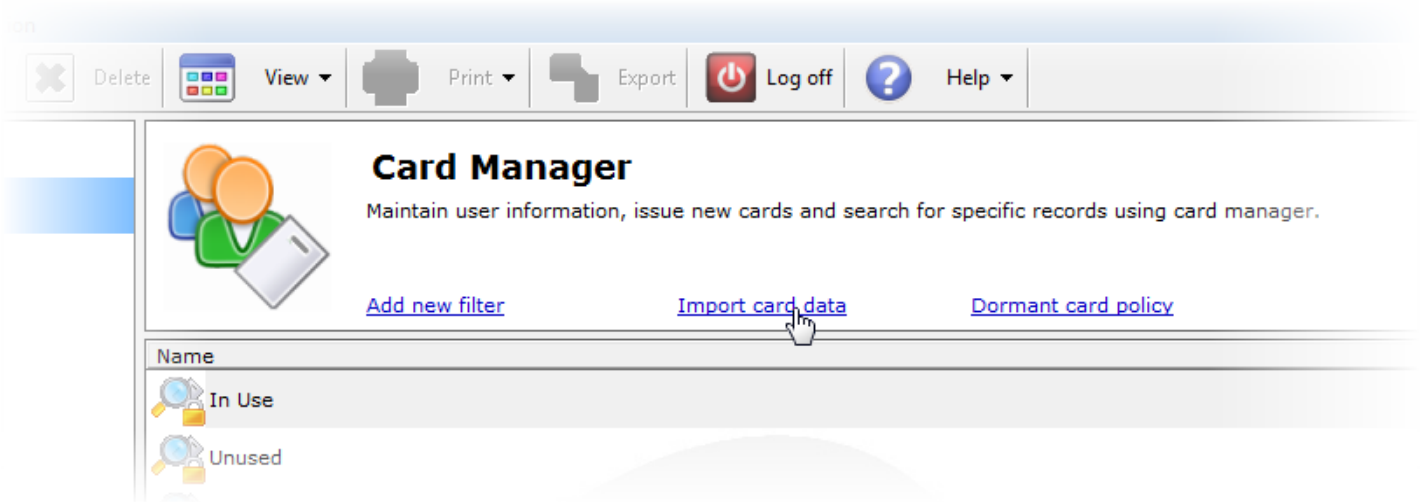

4 The newly added fields will be shown in the **Card Manager** screen, and will now be displayed for all card records.
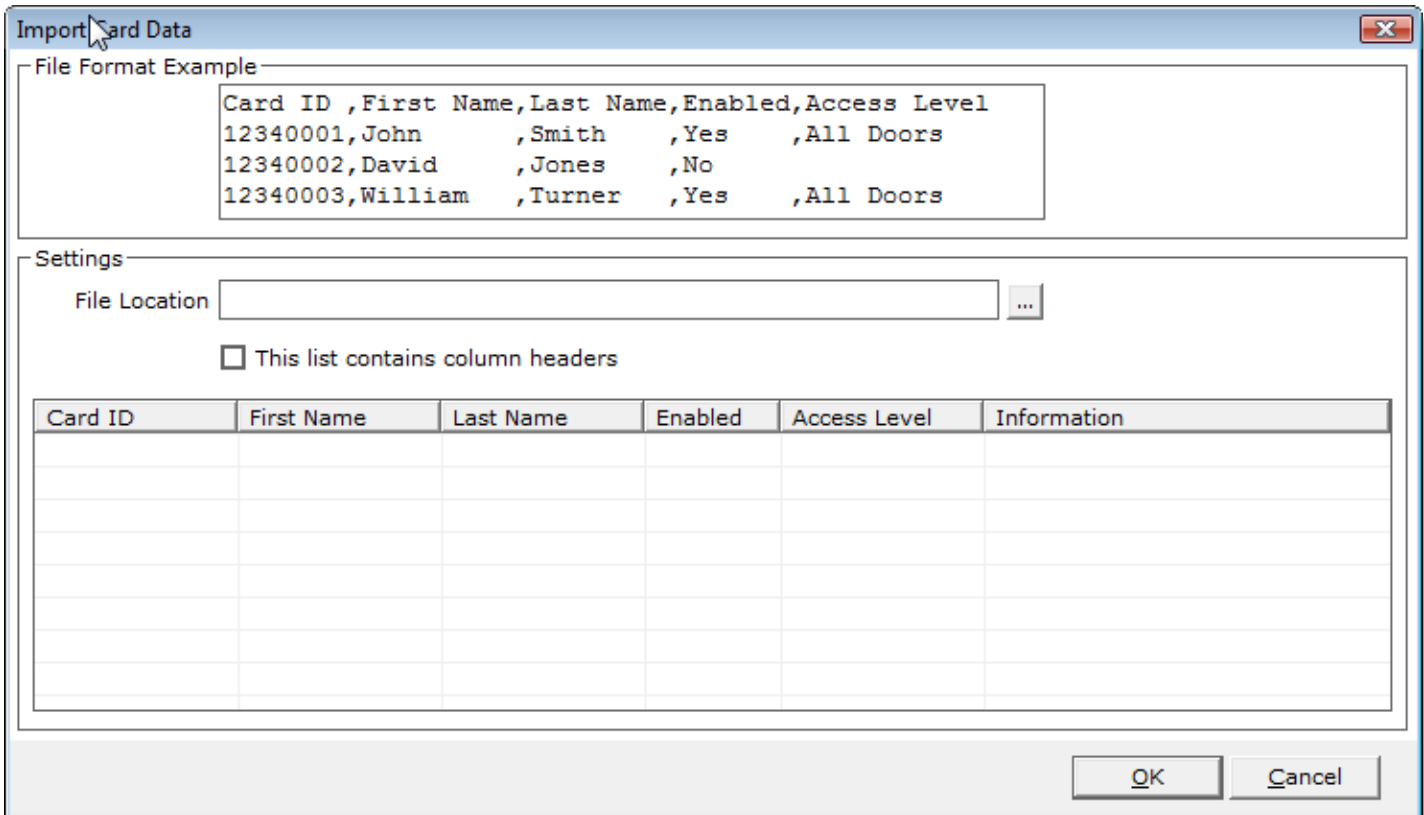
Using Card Data Import to Add or Update Cards

Card Data Import offers a simple way of adding or updating a group of cards.

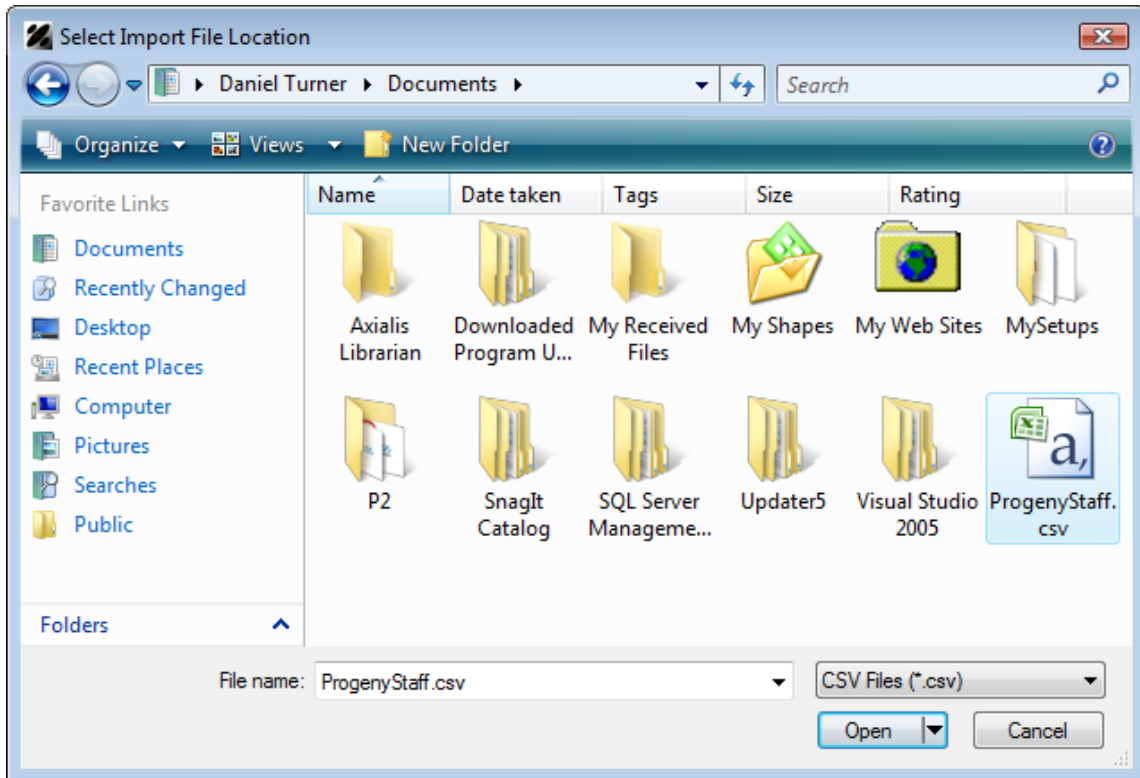**1**   Open **Card Data Import** from **Card Manager**'s Task Panel.

2   An example of the import file format is shown at the top of the screen.
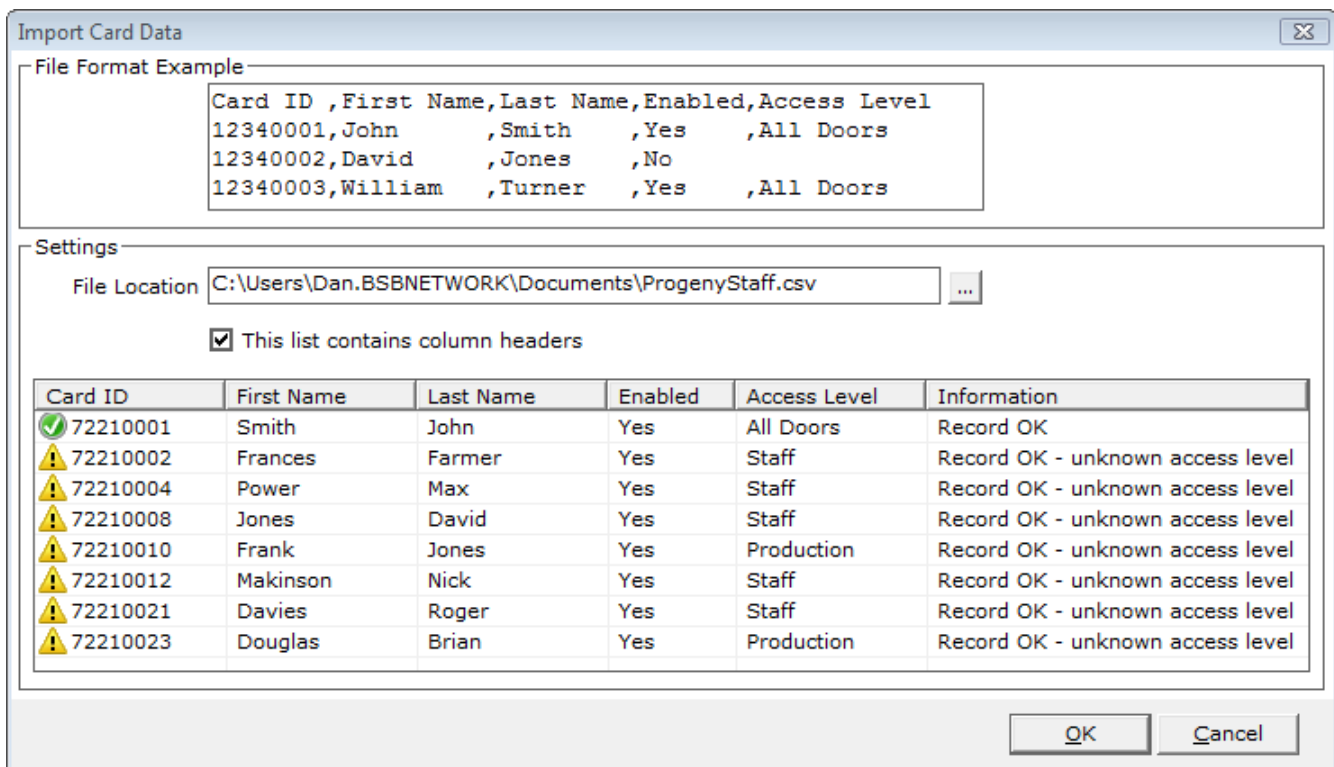
3 Tick the "**This list contains column headers**" if required. Click the ⬚ button to select the import file location. Click **Open.**

4 The import file will be validated before importing. Any errors can be corrected before cards are added or updated. The below example cannot find an **Access Level** called "Production". This can be addressed by either:

- Creating a new access level with this name (See [Restricting Card Access by Door](#))
- Importing the records without the missing **Access Level.**

5 Click **OK** to start the import. A message will appear when it is complete.

6 View the newly added records in Card Manager's **All** filter.

Quickly Search for Cards

1 Open the **All** filter in **Card Manager.**

2 Enter the search text in the "**Search For**" box.

Performing an Advanced Card Search

1 Open the **All** filter in **Card Manager.** Click **Advanced Search**, and enter the search criteria. Click **OK.**

2 Matching card records will be displayed. Clear the results by clicking the "**Search For**" box.

Creating a Card Report

1 Right-click **Card Manager,** and select **Create New Card Filter.**
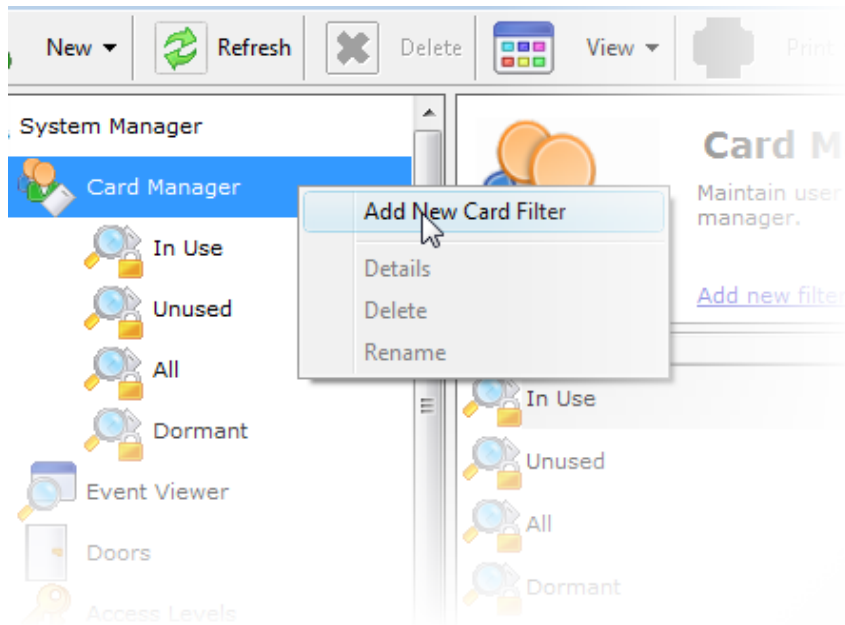
2 Right-click the newly added report, and select **Details** to change the settings.
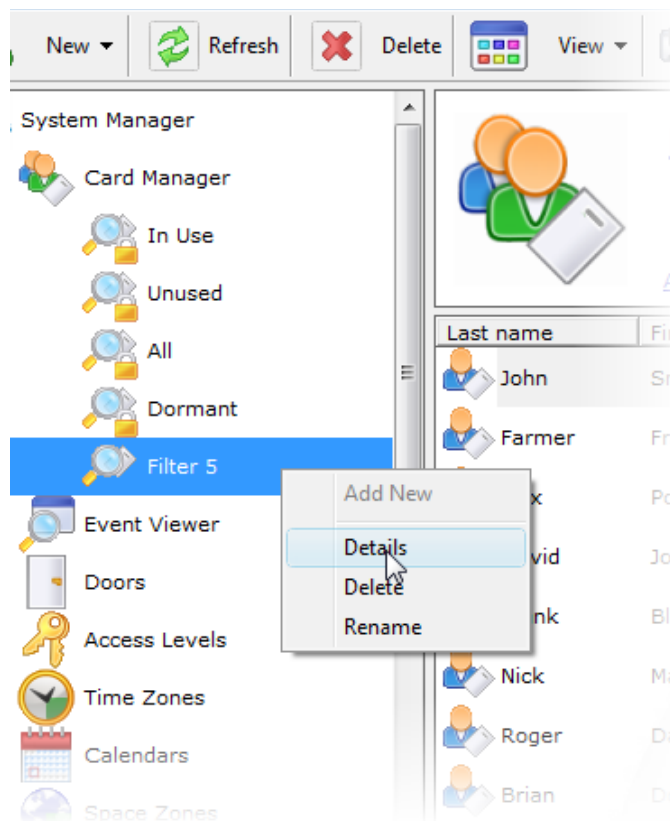
3 Select the **Columns** to display in the System List.
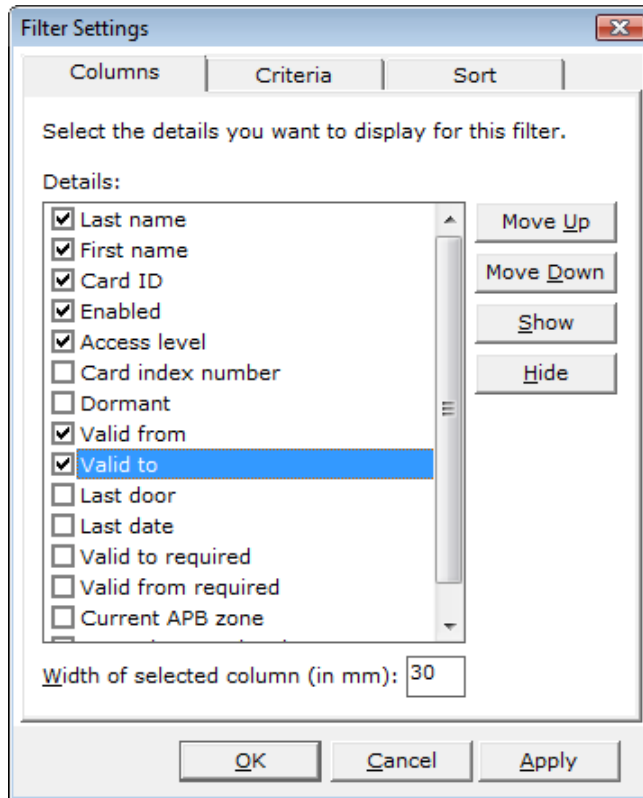
4 Use the **Add** and **Remove** buttons to change the **Criteria.** In the below example, only enabled cards with a "Staff" **Access Level** will be returned.

5 Select the order the results will be displayed using **Sort.**

Filter Settings

| Columns | Criteria | Sort |

Select the sort order for this filter.

Sort By

First name ▼ | ○ Ascending | ● Descending

Last name
First name
Card ID
Enabled
Access level
Valid from
Valid to

The[n By] ● Ascending | ○ Descending

Then By

[_____] ▼ | ● Ascending | ○ Descending

[OK] [Cancel] [Apply]

6 Click **OK** to view the results. These can be filtered further by using Quickly Search for Cards or Performing an Advanced Card Search.

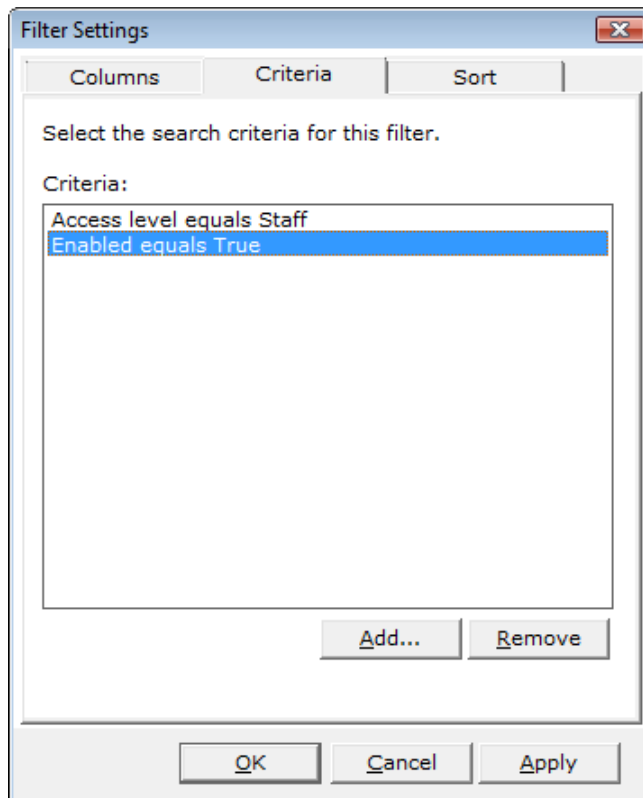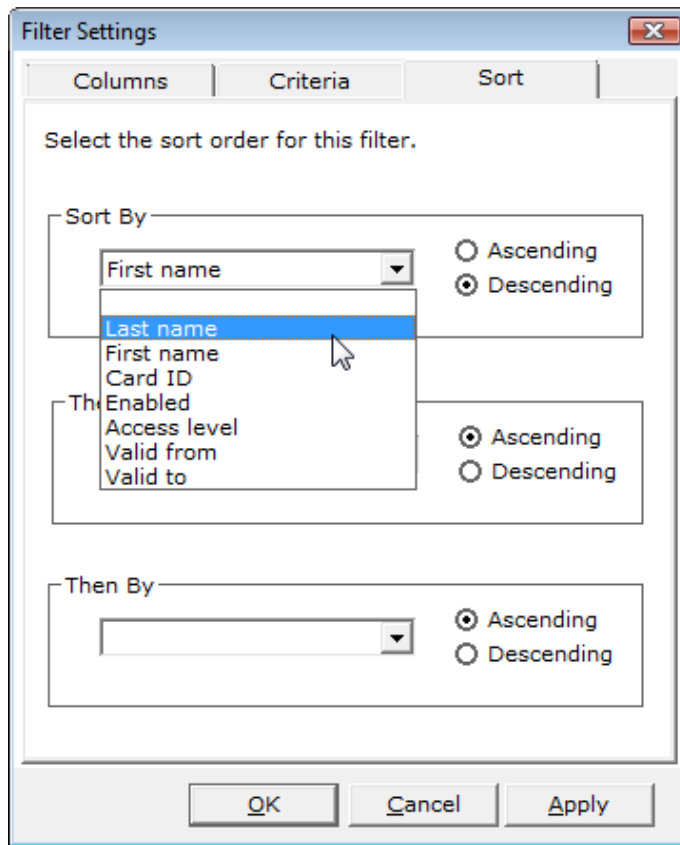| New ▼ | Refresh | Delete | | View ▼ | Print ▼ | Export | Log off | Help ▼ |

System Manager
Card Manager
  In Use
  Unused
  All
  Dormant
  Filter 5
Event Viewer
Doors
Access Levels
Time Zones
Calendars
Space Zones

Filter 5

Search for [_____]

5 matching records found
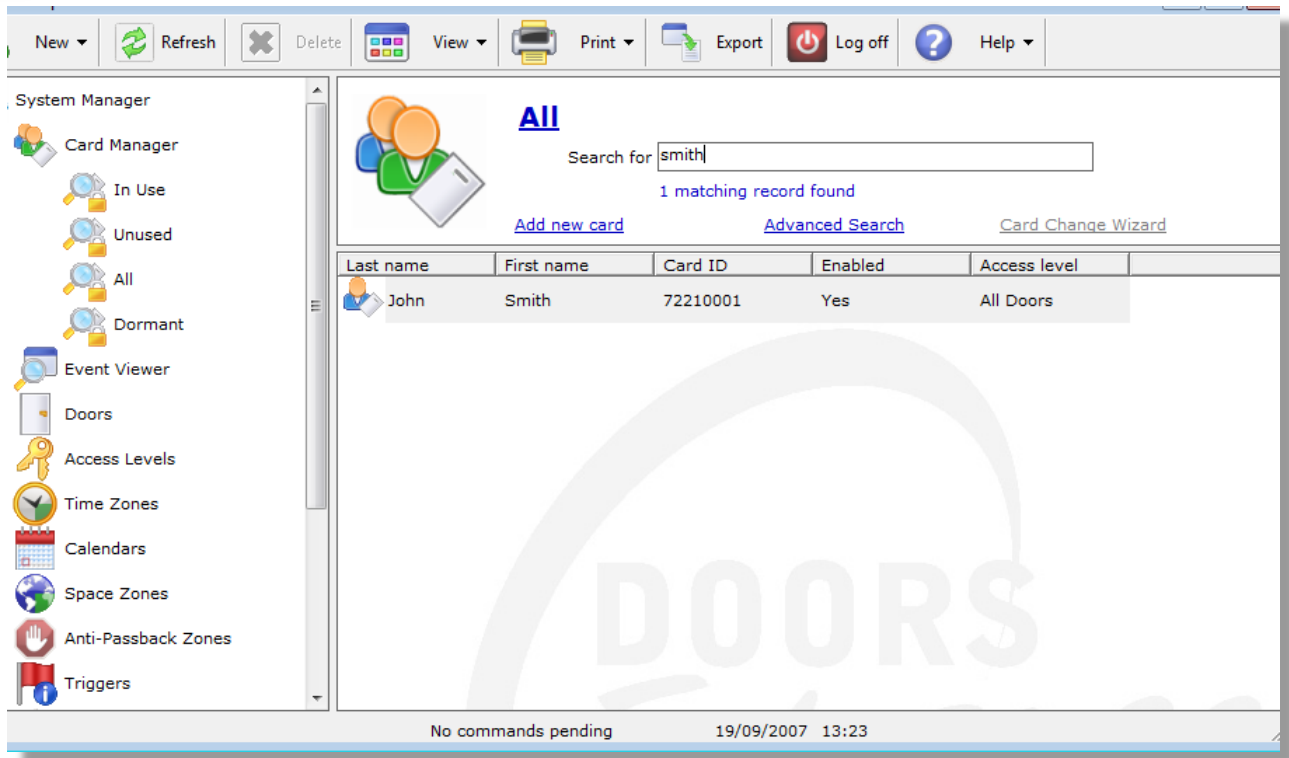
Add new card   Advanced Search   Card Change Wizard

Last name	First name	Card ID	Enabled	Access level	Valid from	Valid to
Roger	Davies	72210021	Yes	Staff	Always	Always
Nick	Makinson	72210012	Yes	Staff	Always	Always
Max	Power	72210004	Yes	Staff	Always	Always
Farmer	Frances	72210002	Yes	Staff	Always	Always
David	Jones	72210008	Yes	Staff	Always	Always

1 command pending   19/09/2007 13:55

Using Change Wizard to Update Cards

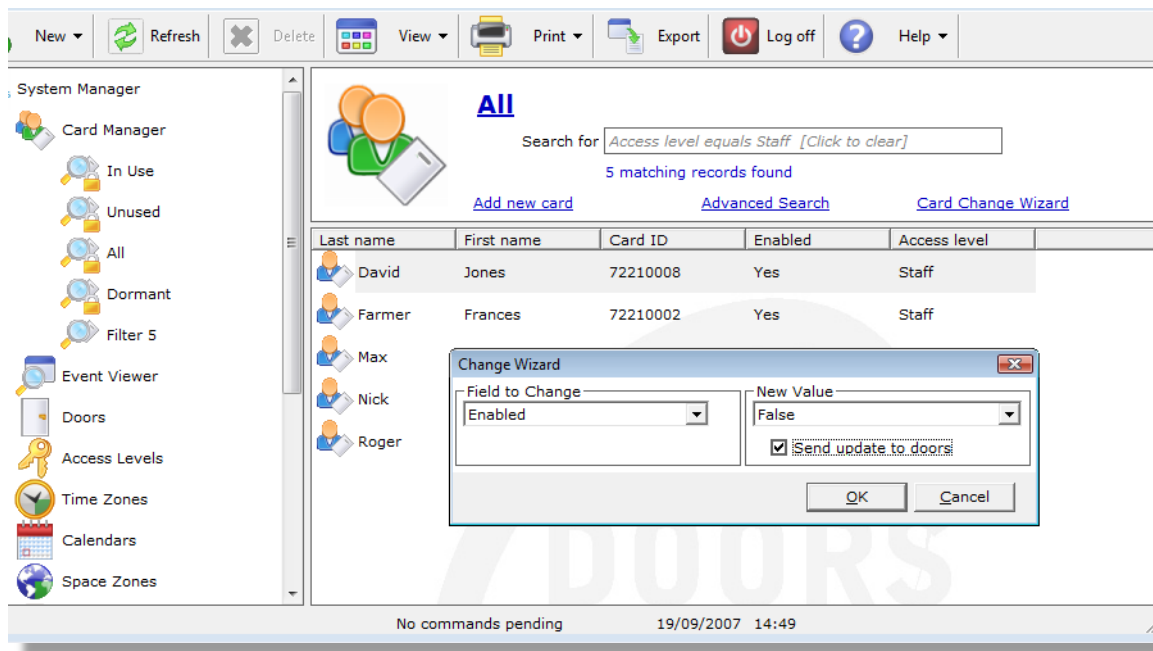In the following example, all cards with an **Access Level** of "Staff" will be disabled.

1 Search for all cards with a Staff Access Level, as described in [Performing an Advanced Card Search](#).
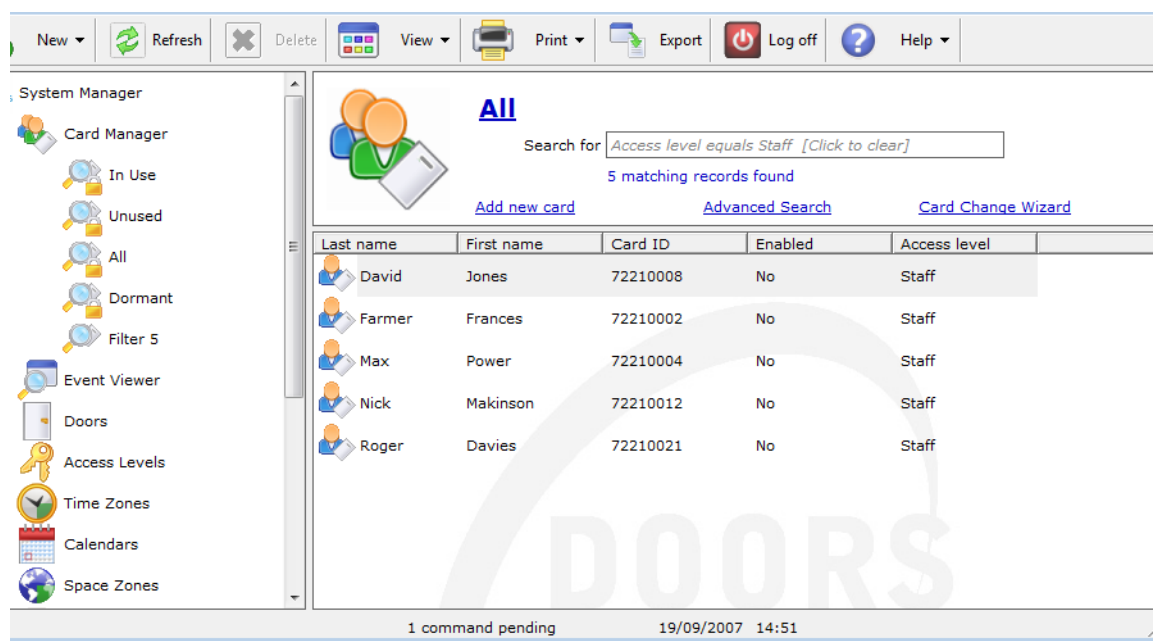
2 Click **Card Change Wizard.**

3 Select **Enabled** from **Field to Change**, and **False** from the **New Value.** In this instance, it is necessary to inform the doors of the change, so tick **Send Update to Doors.**

4 Click **OK.** The records have been updated.

Disabling Cards Using Dormant Card Policy

Dormant Card Policy allows you to automatically disable cards that have been issued, but not used for a specified period of time. The **Dormant** check is set for any cards that have not been used. This can be displayed and changed in **Card Manager**. See Customising Card Manager for details on how to add fields to **Card Manager,** and Creating a Card Report for how to include additional fields in a card filter.

1   Open **Dormant Card Policy** from **Card Manager**'s Task Panel.
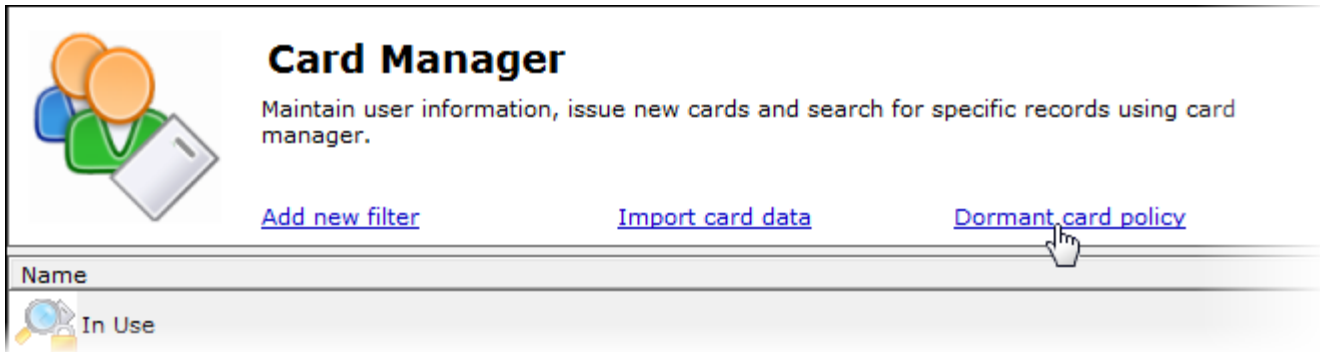
2   Tick "**Check for dormant cards every day at**" and enter values for "**Make cards dormant if not used in last**".
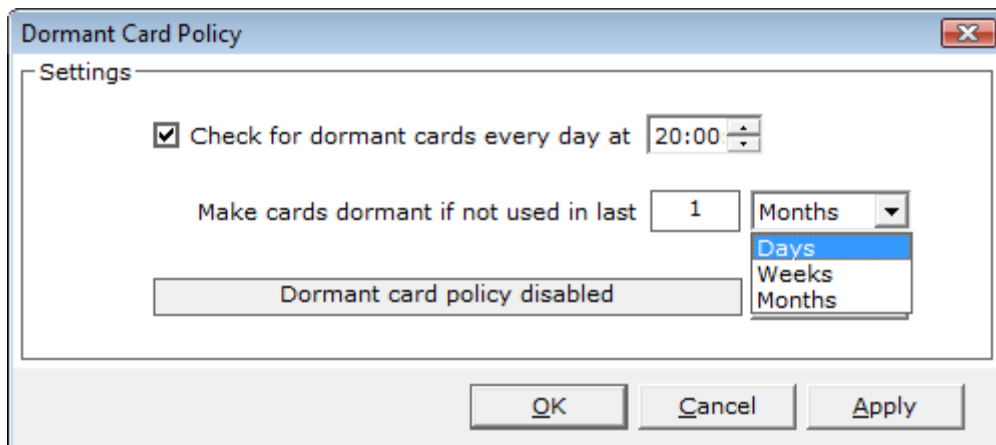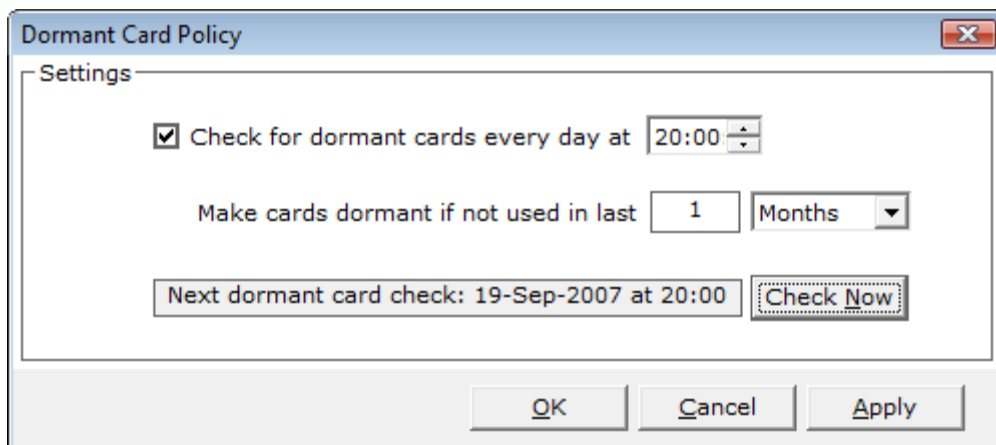

3   Click **Apply.** The date and time of the next check will be updated. Use **Check Now** to check for dormant cards at any time.

Adding a Photo to a Cardholder

1 Locate the required cards. For new cards see Adding a Card. Existing cards can be found by Performing an Advanced Card Search or Quickly Searching for Cards. Double-click the required card to edit the card record.

2 Click **Cardholder Photo** from the toolbar.
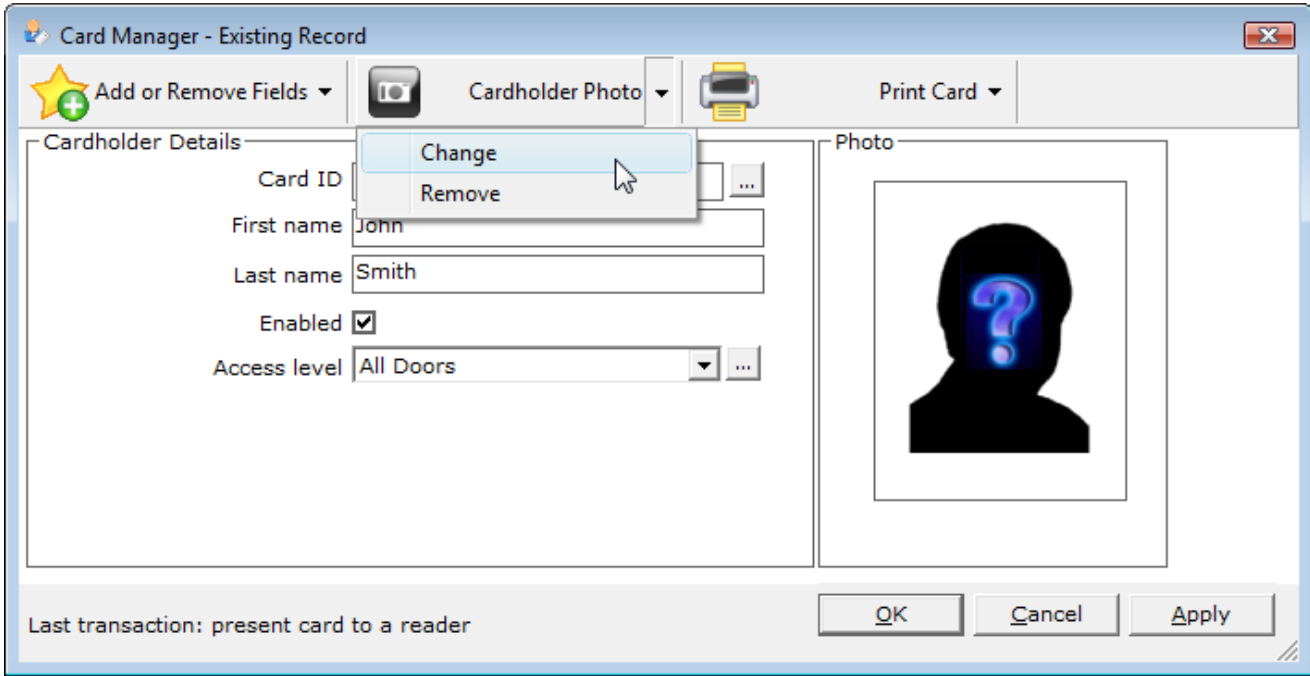
3 Click **Open** from the **Capture Photo** toolbar, and browse to the photo file location.

4

Size the photo using the slider bar. Position the photo by holding down the left mouse button.

5
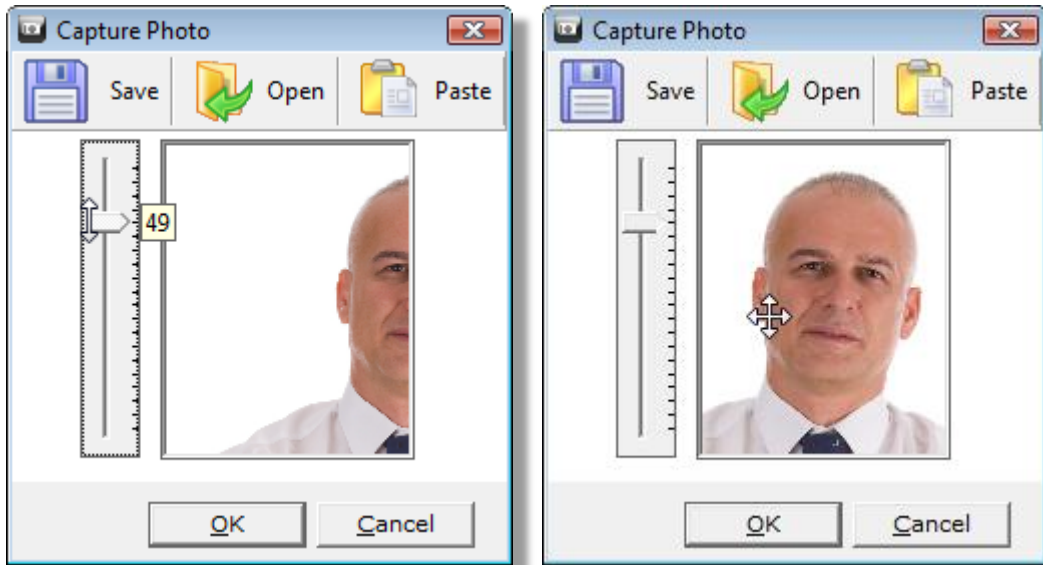
Click **OK.**
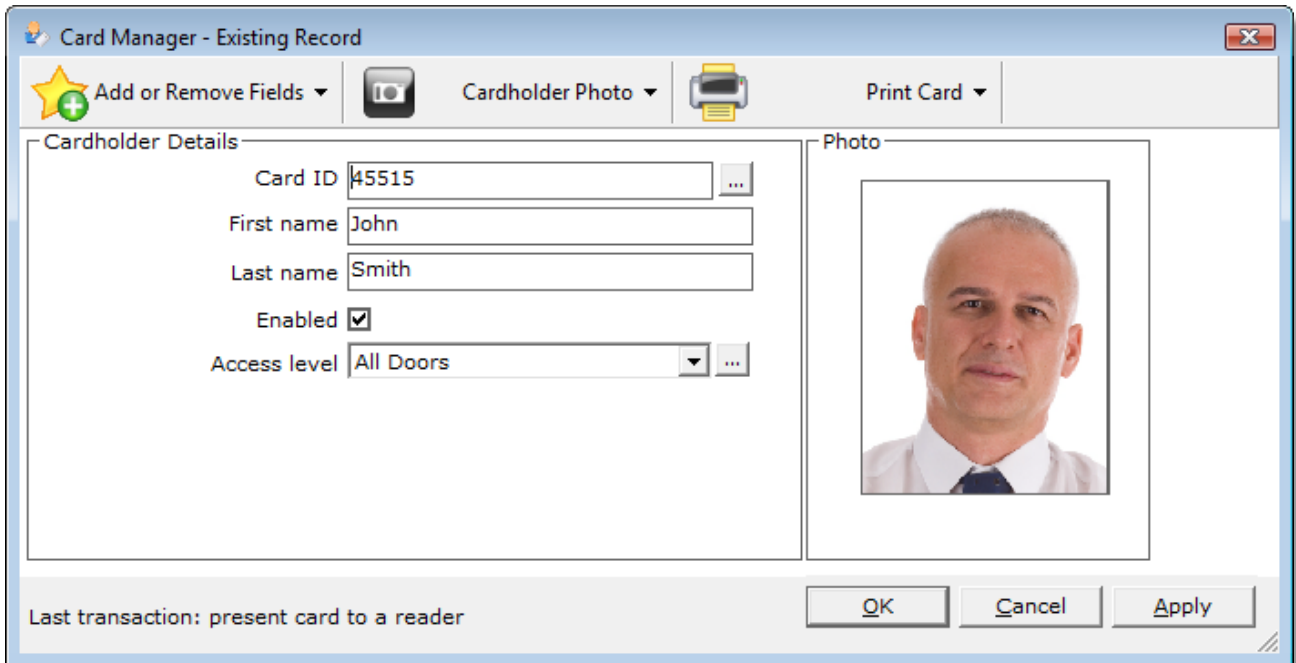
Creating a Card Design

1

Add a new **Card Design** from the **New** menu.
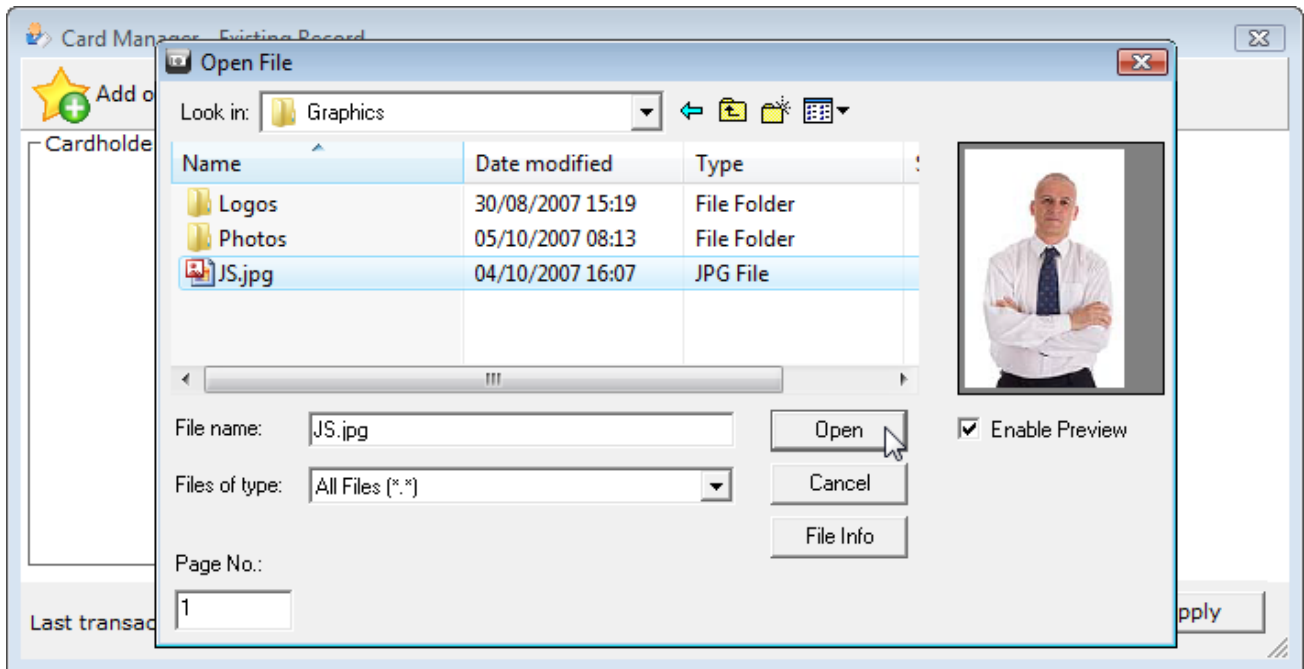

2
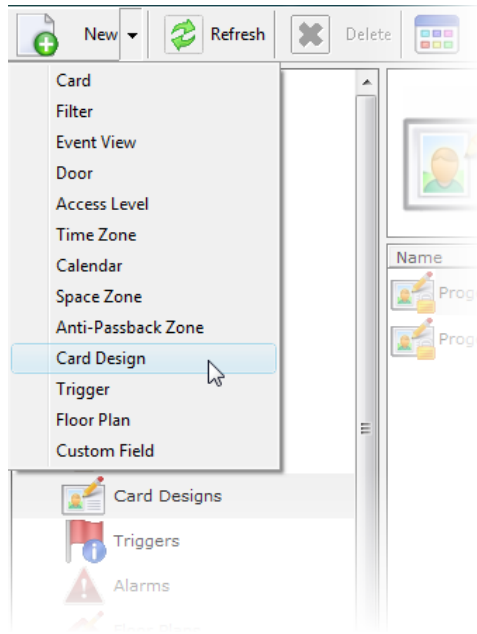
Select the desired **Orientation.**
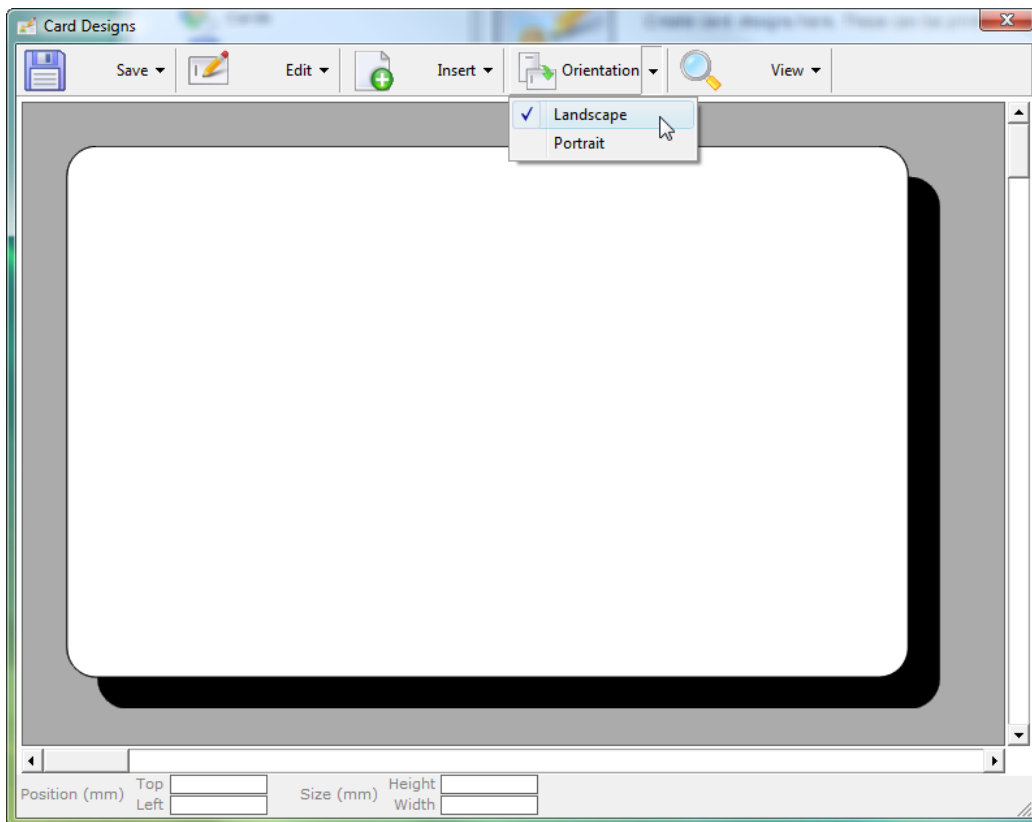
3 Add gridlines and alter the zoom level in **View**. Gridlines will not be printed with the final design.
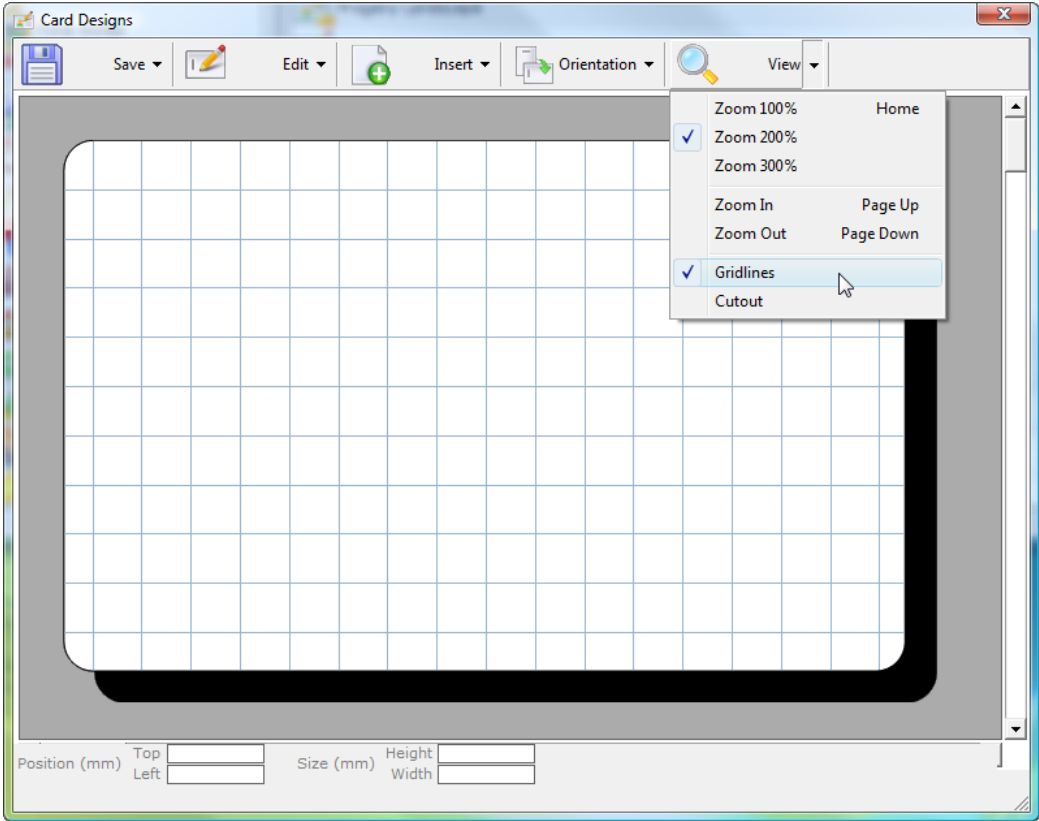
4 Use the **Insert** menu to add items to the design. Add **Text** in this way.
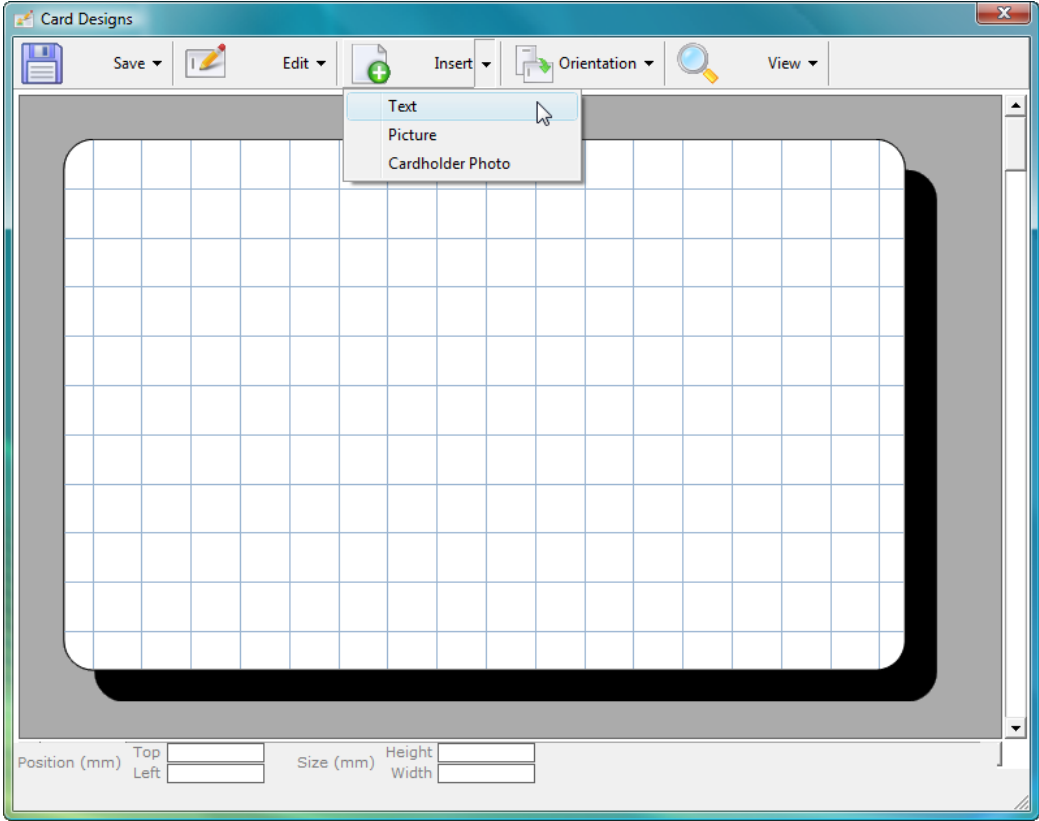
5 Enter the text and set the font and colour in the **Text Properties** screen.
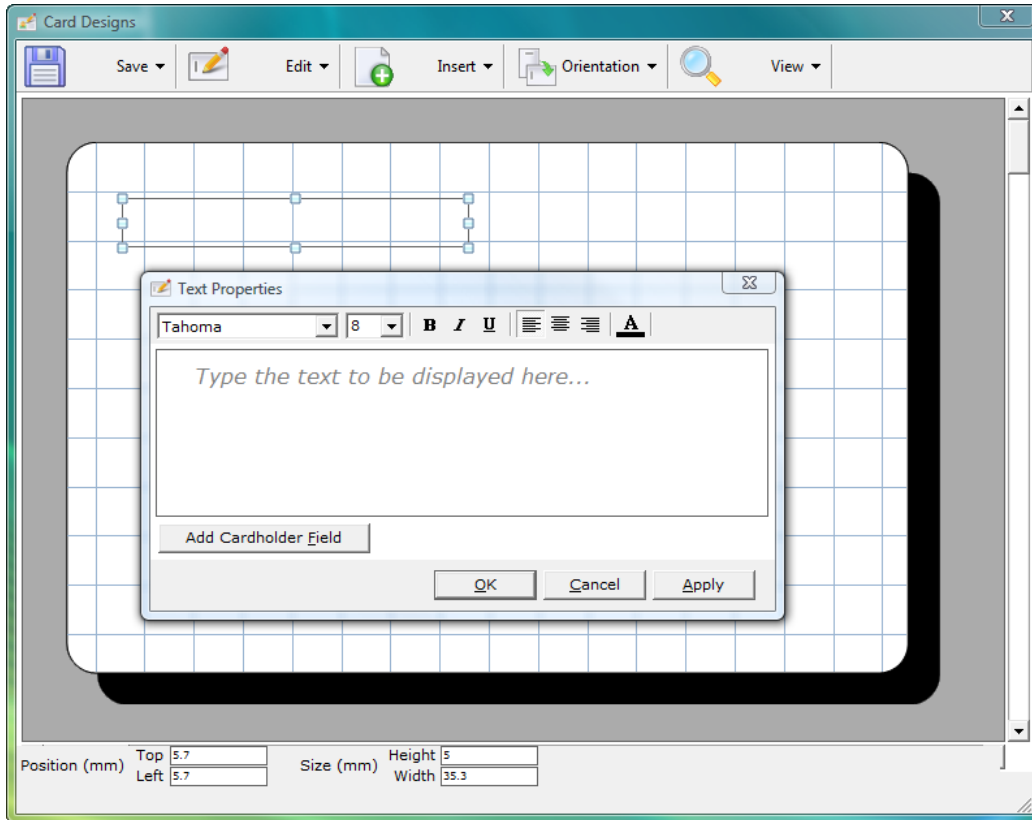
6 Click **Add Cardholder Field** to display cardholder information on the card. These fields are displayed using [and], for example, [First Name] will be replaced with the cardholder's first name when printing. Click **OK** when finished.
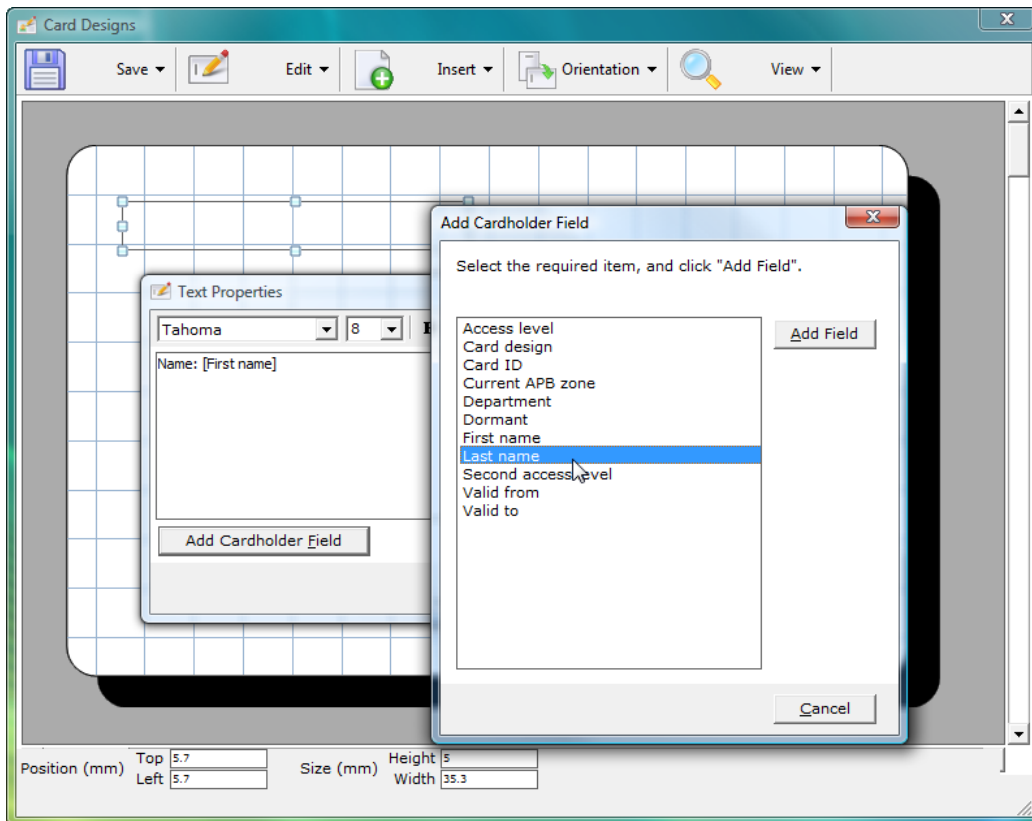
7 Size items by clicking the handles and moving the mouse, or by using the **Position** textboxes in the bottom right of the screen.
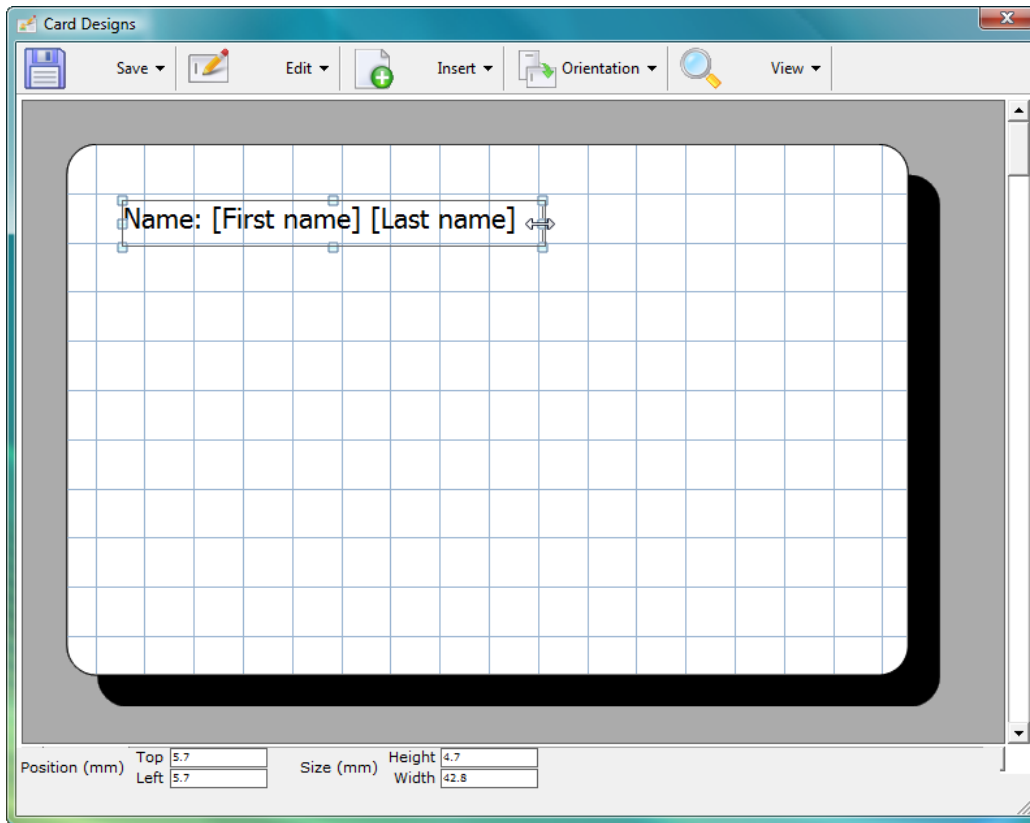
8 Add photos and pictures by using the **Insert** menu.
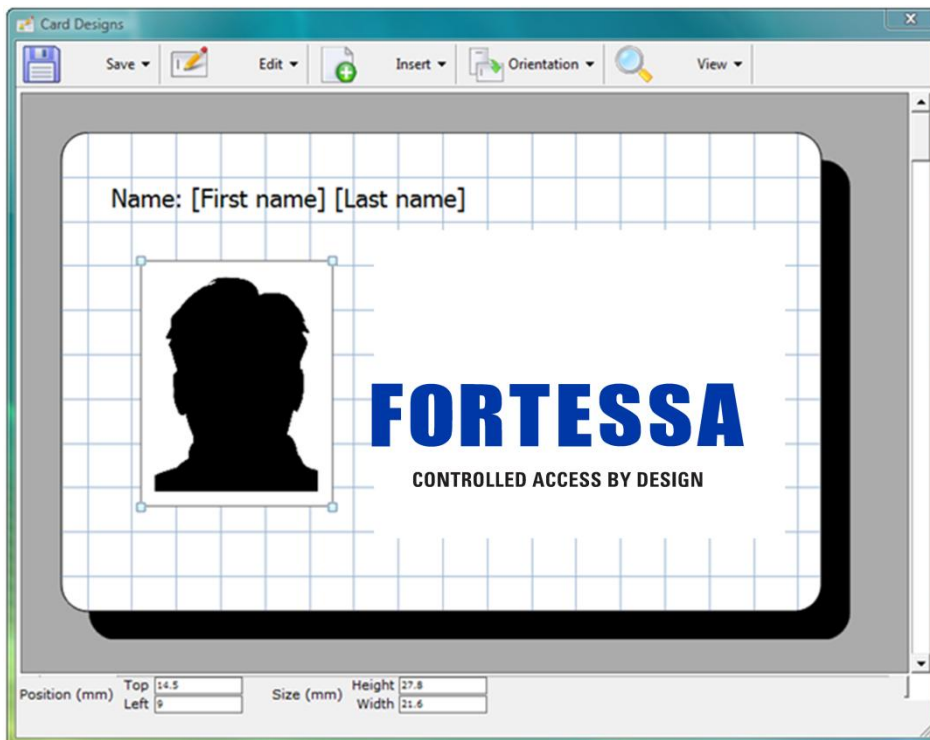
9 Position the newly added items. Click **OK** to save, and enter a name for the design.
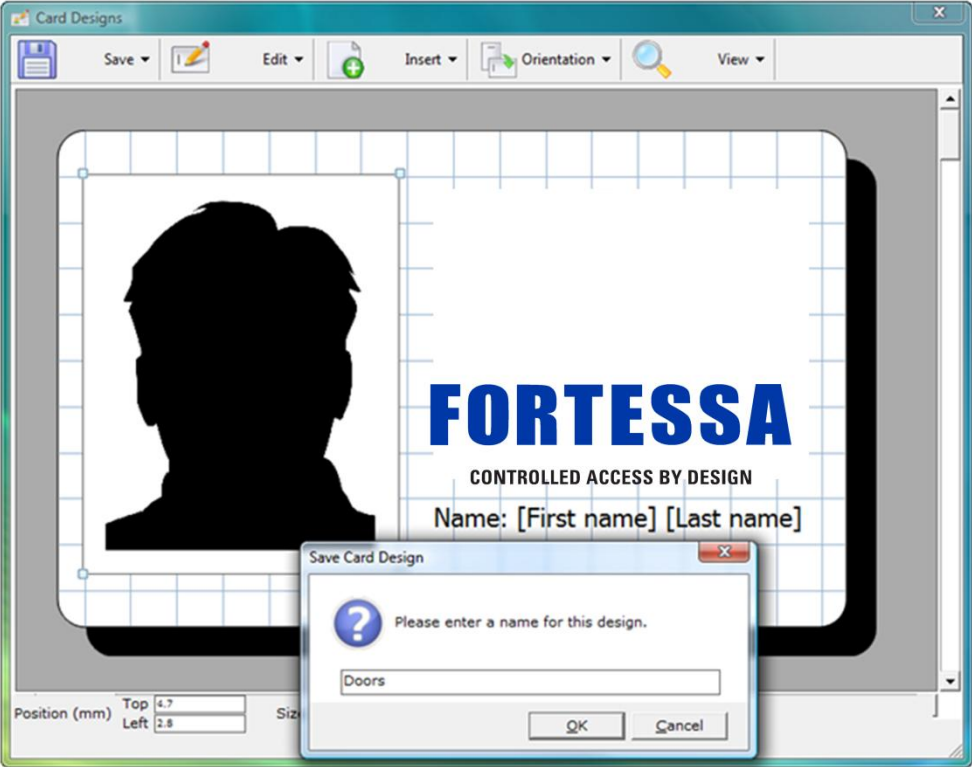
Printing a Card Design

1 Open a the card manager screen, and add a photo if necessary (as described in Adding a Photo to a Cardholder)
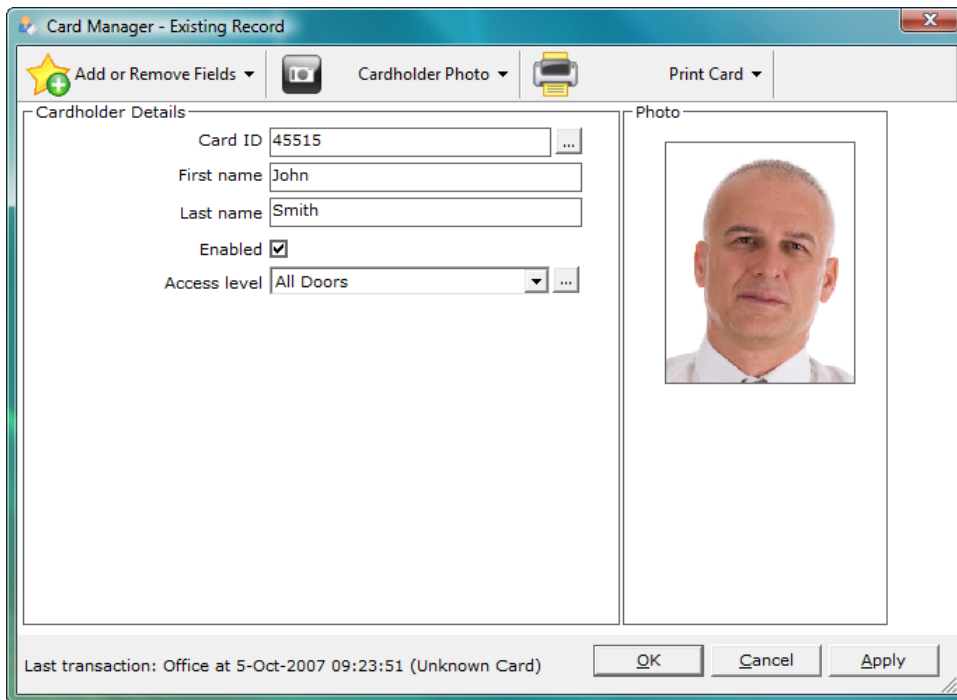
2 Ensure that the **Card Design** field is shown.

3
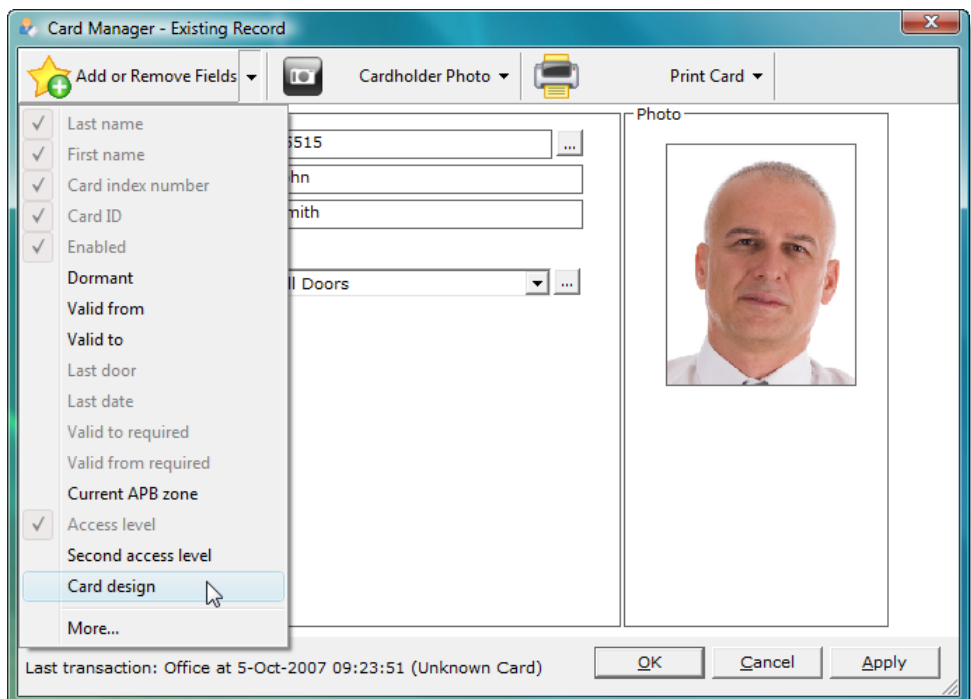
Select the required card design from the list.
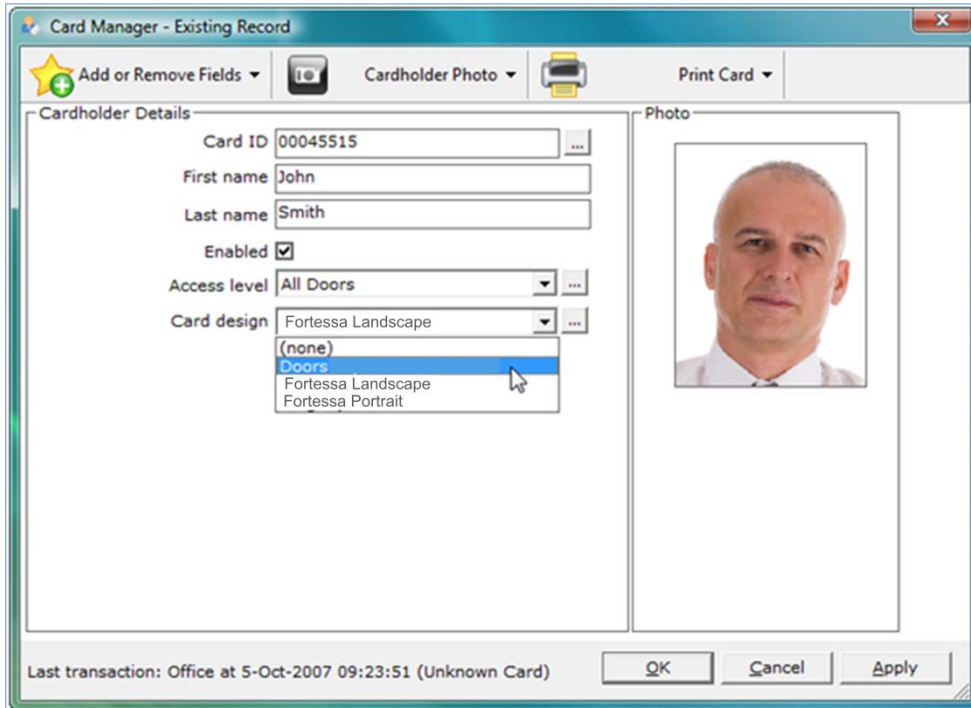
4

Ensure the correct printer is selected.
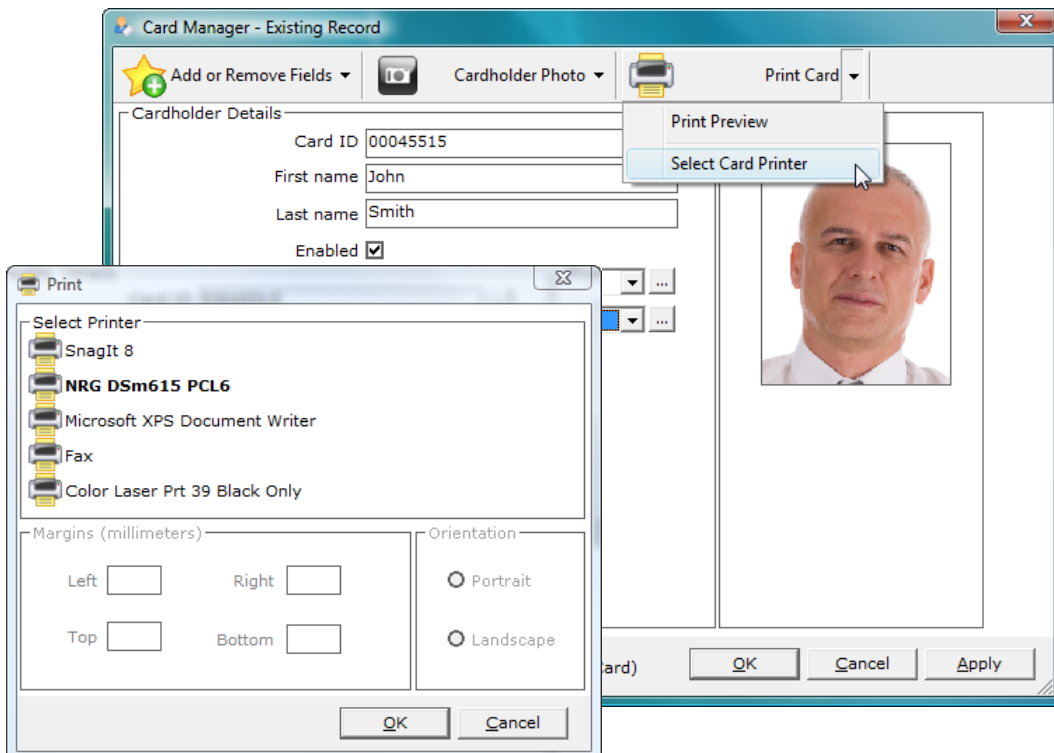
5 Select **Print Preview** to view the card before printing.
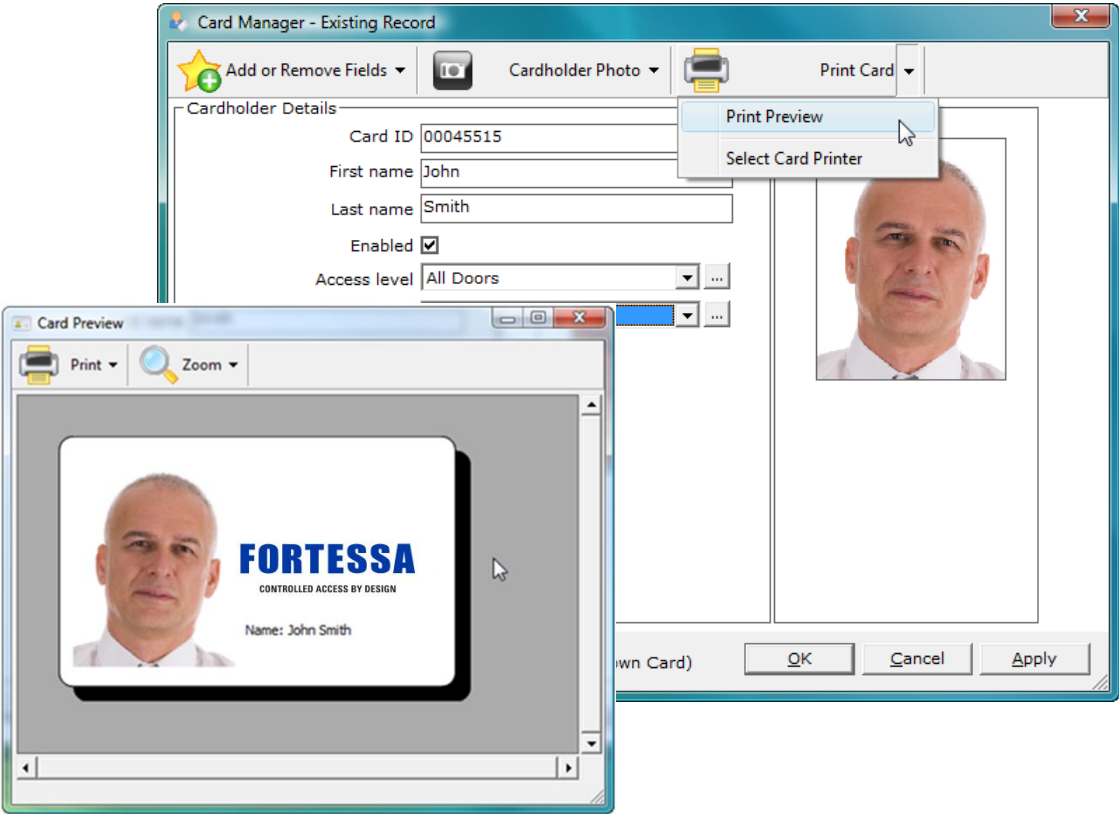
6 Print the card using the **Print** button.

3.   Viewing System Activity

Viewing Current Activity

Create filtered views of user activity using **Event viewer**. Each view can be saved for future use and include a print or export facility.

1   Create a new view by selecting **Event View** from the **New** list on the **Toolbar**.
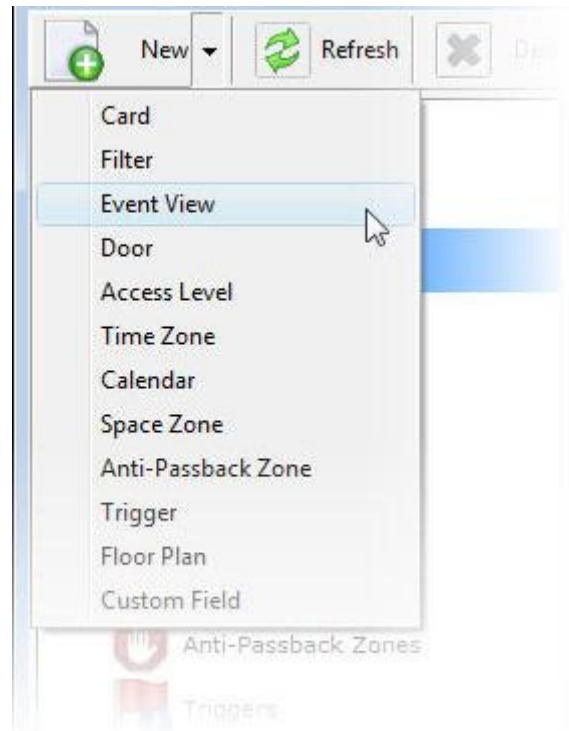
2   The most recent 200 events will be displayed. Right-click any item to view the cardholder or door details, or to quickly disable the card.
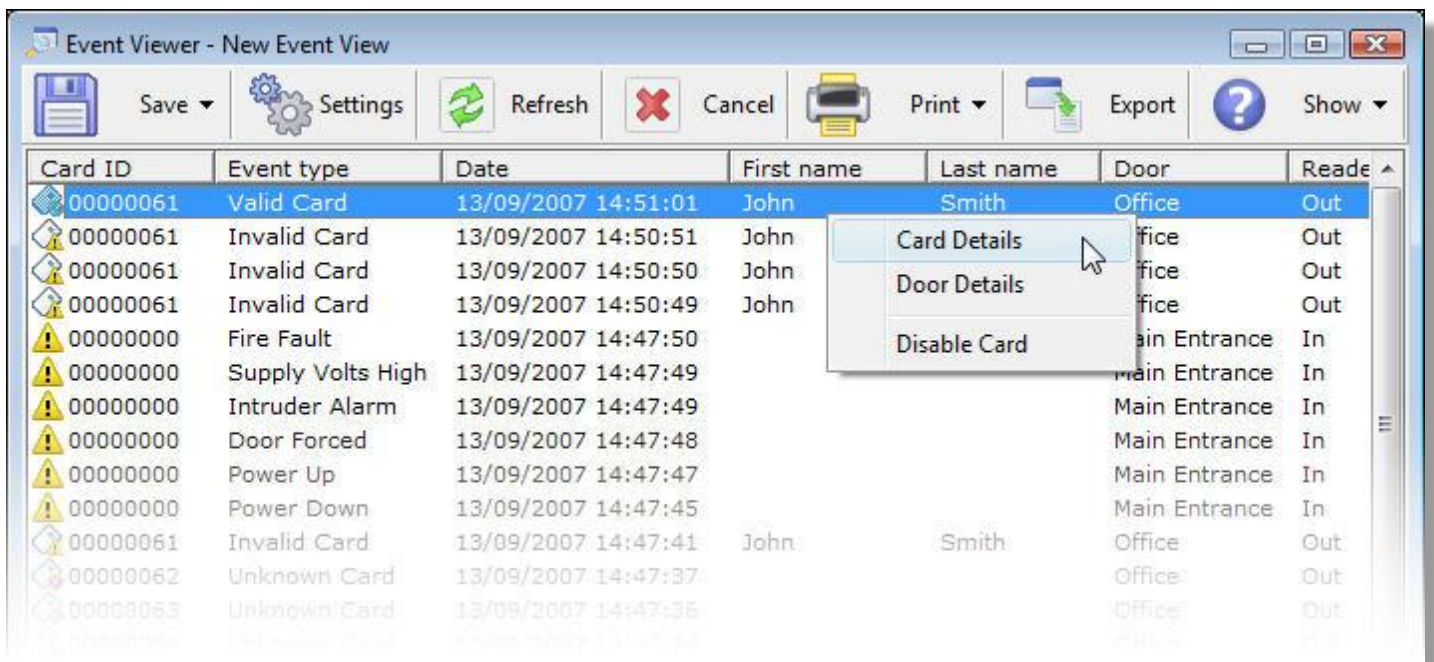
Creating a Custom Report

1 Create a new view by selecting **Event View** from the **New** list on the **Toolbar**, as described in <u>Viewing Current Activity</u>.

2 Select **Settings** from the **Toolbar** in **Event Viewer.** The **Settings** screen is broken down into 4 sections:

Select the required **Report Type.** Available reports are:

Live Events
This shows the last 200 events. A Live Events report is created when a new Event View is added.

Event History
Events in a specified date range. The dates are set in the Criteria section.

Zoned Roll Call / APB Zoned Roll Call
Who is currently in a space zone or anti-passback zone.

Attendance
Shows hours worked in a specified date range.

Absence
Cardholders not present on a particular day.

Tick the required columns to include or exclude them. Use the move up and down to change the order they are displayed in.

Filter by card ID or name using "**Who".**

Select the required date range in "**When**"

Select the required doors in "**Where**"

Select specific events using "**What**"

3 Pick the required **Sort Order**.
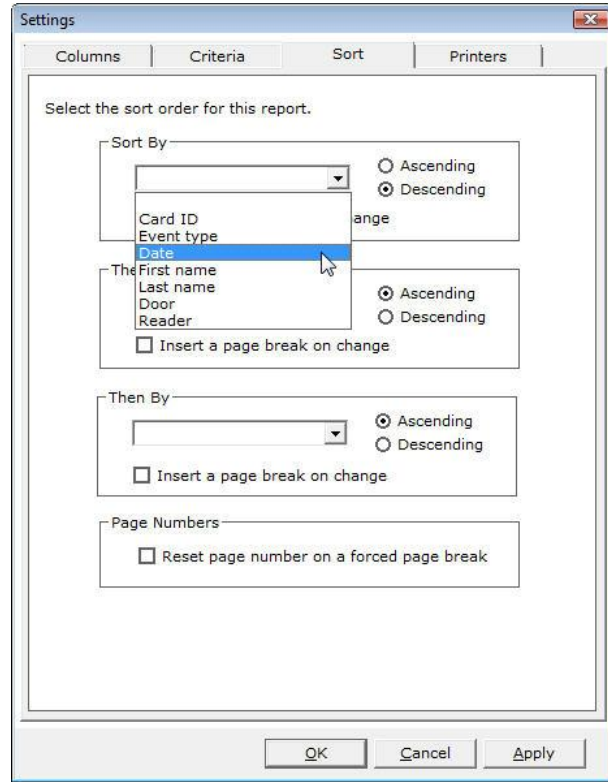
4 Select **printer** options.
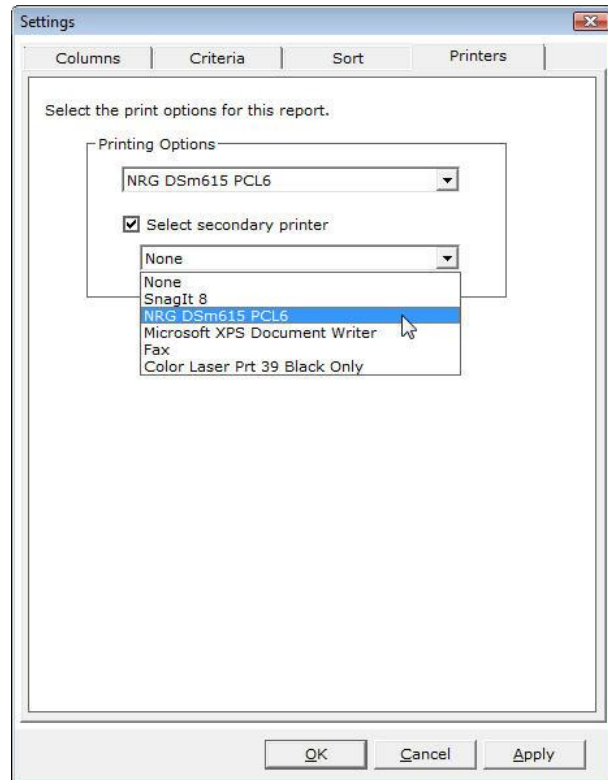
3

Click **OK** to save. Enter a report name.
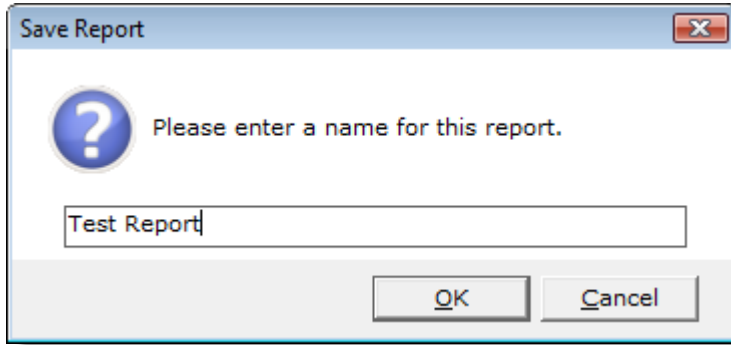
4

The report has been created and can now be viewed.

Card ID	Event type	Date	First name	Last name	Door	Reader
00000061	Valid Card	13/09/2007 11:41:36	John	Smith	Office	Out
00000061	Invalid Card	13/09/2007 14:47:18	John	Smith	Office	Out
00000061	Invalid Card	13/09/2007 14:47:19	John	Smith	Office	Out
00000061	Invalid Card	13/09/2007 14:47:20	John	Smith	Office	Out
00000061	Invalid Card	13/09/2007 14:47:28	John	Smith	Office	Out
00000061	Invalid Card	13/09/2007 14:47:41	John	Smith	Office	Out
00000061	Invalid Card	13/09/2007 14:50:49	John	Smith	Office	Out
00000061	Invalid Card	13/09/2007 14:50:50	John	Smith	Office	Out
00000061	Invalid Card	13/09/2007 14:50:51	John	Smith	Office	Out
00000061	Valid Card	13/09/2007 14:51:01	John	Smith	Office	Out

10 matching records found

5

Return to the report at any time in **Event Viewer.**
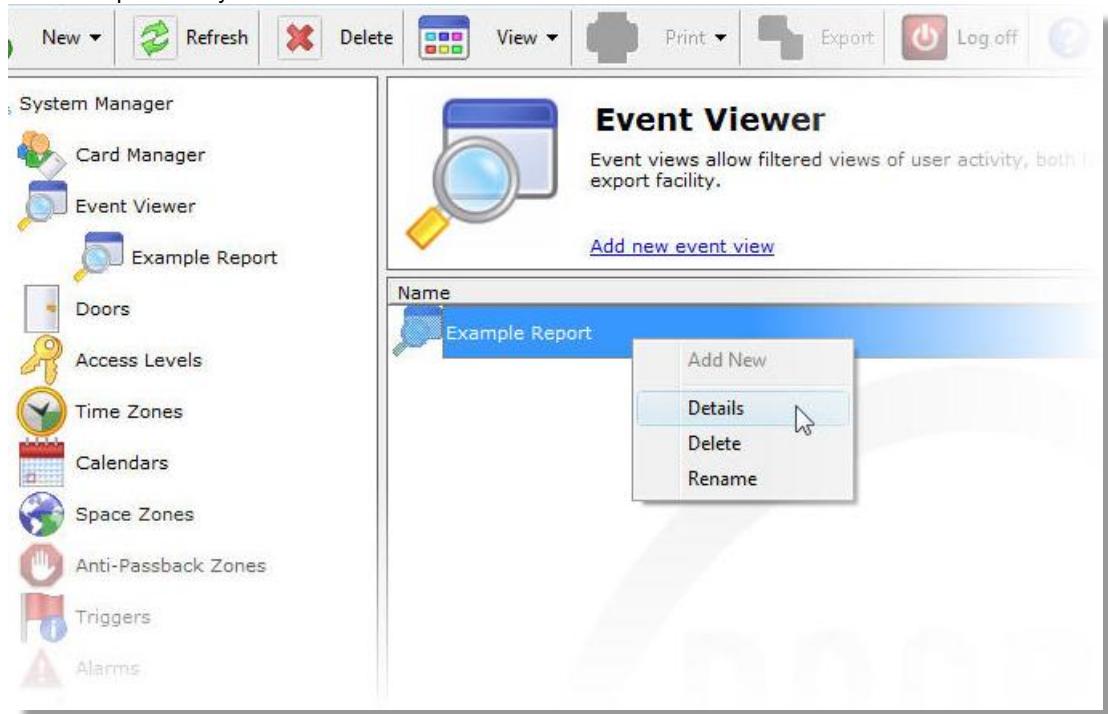
Creating an Alarm
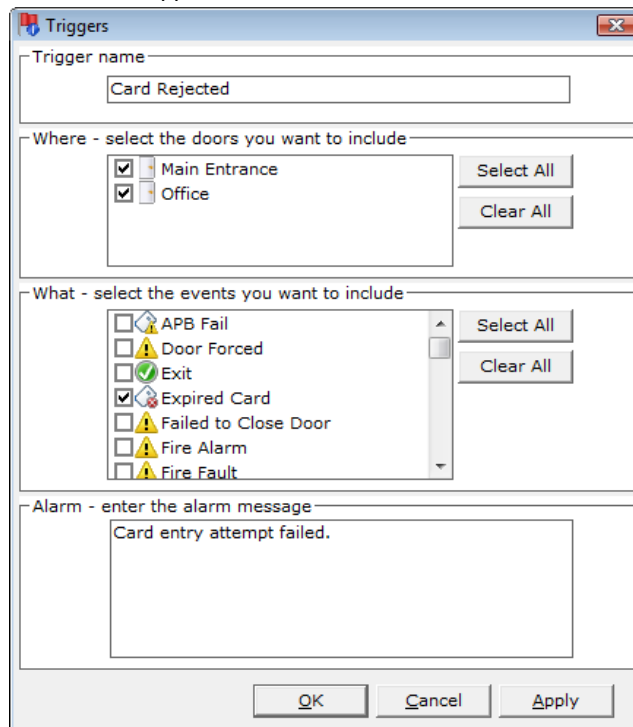
Alarms can be created to report on specified system events. These could be cardholders attempting to access unauthorised areas, unknown cards or door-based events such as supply voltage warnings or power failures. These are added using Triggers, and viewed in Alarms.

In the following example, an alarm will be generated for any unusual card activity.

1 Add a new **Trigger**.
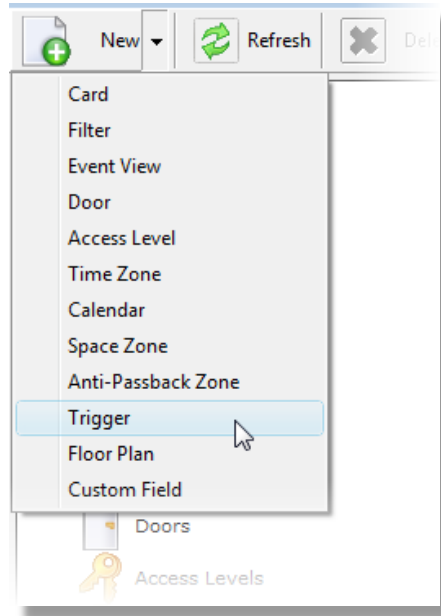
2 Enter a name for this trigger. Select the applicable doors and events, and enter the alarm text. Click **OK.**

Responding to an Alarm

When an event is processed by the server matching the trigger criteria (see Creating an Alarm), all users with access to **Alarms** will be presented with the below screen, along with an audible alarm noise.
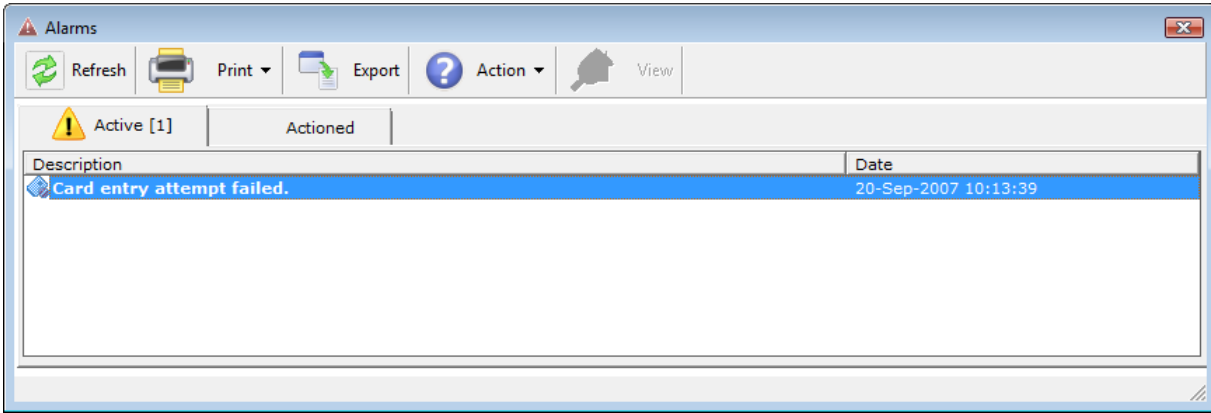
1 Click the alarm to **Acknowledge** it. The siren will now stop.
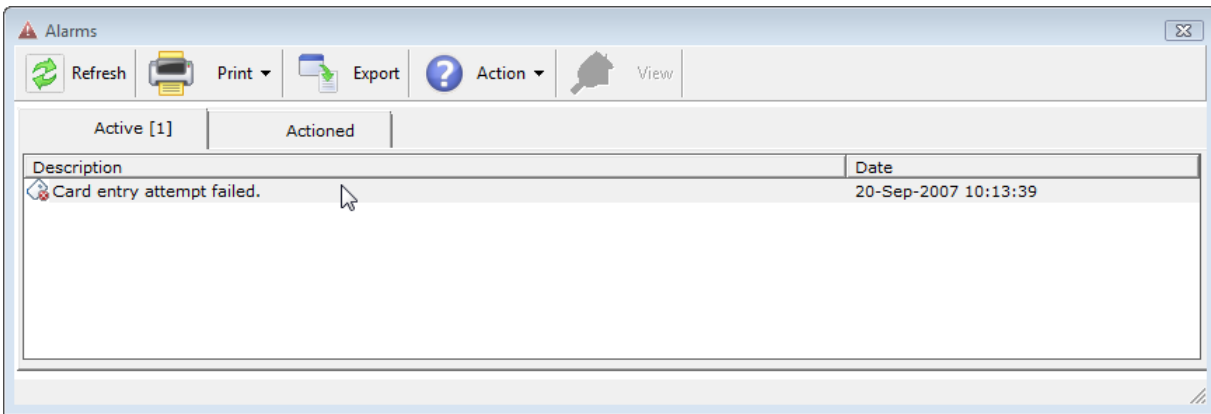
2 Click **Action** on the toolbar.
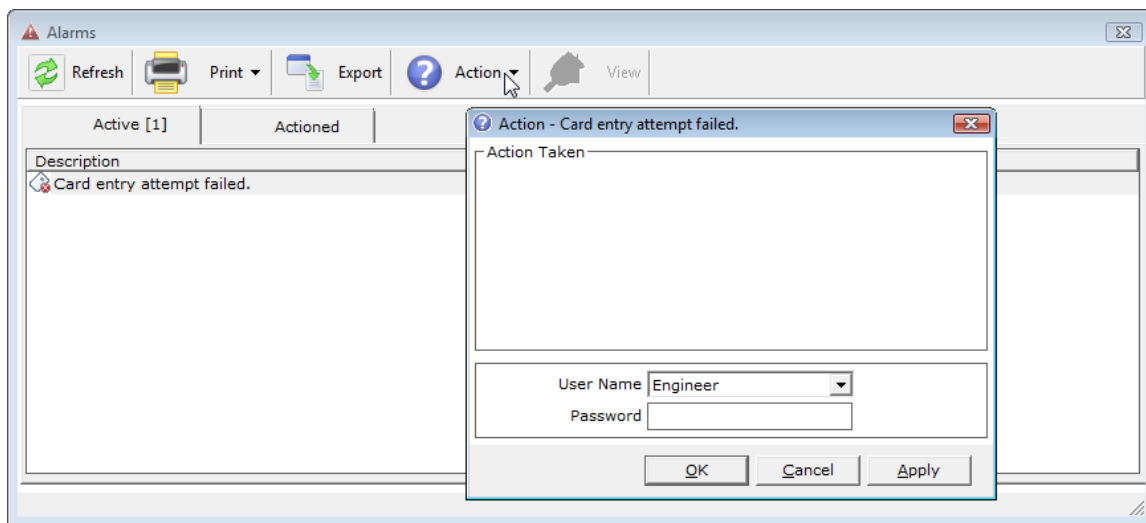
3 Add relevant details of the alarms, including any steps taken to resolve the problem. Enter the password used to log in to the Doors Fortessa software.
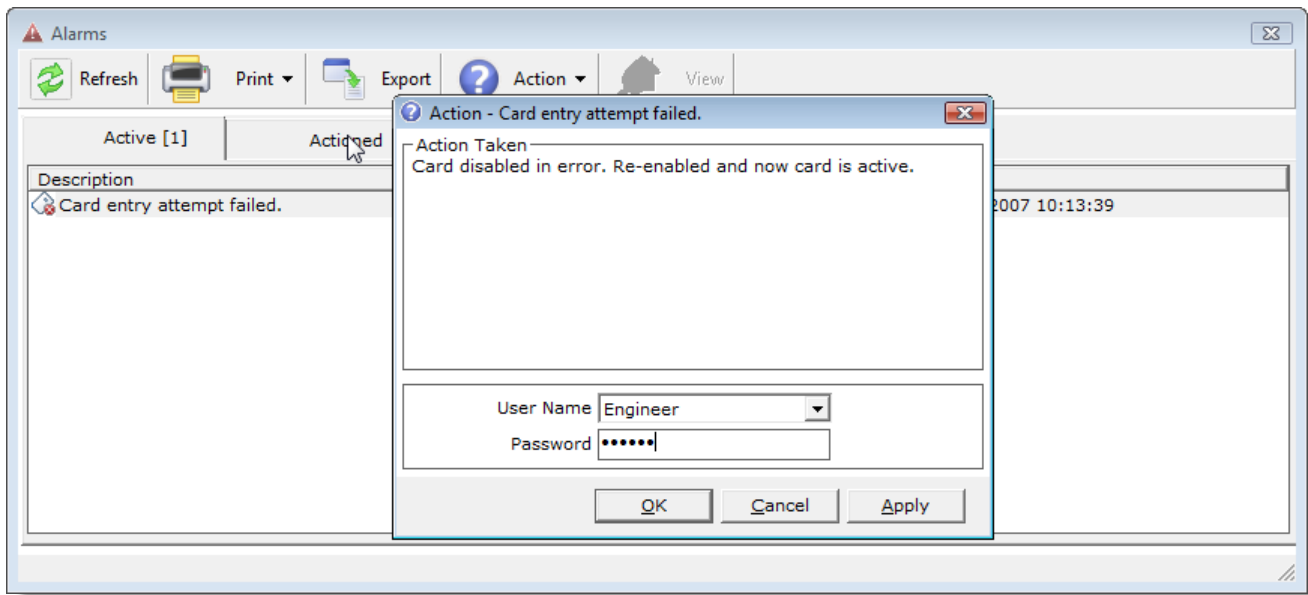
4 Click **OK**. The alarm can now be viewed in the **Actioned** tab.
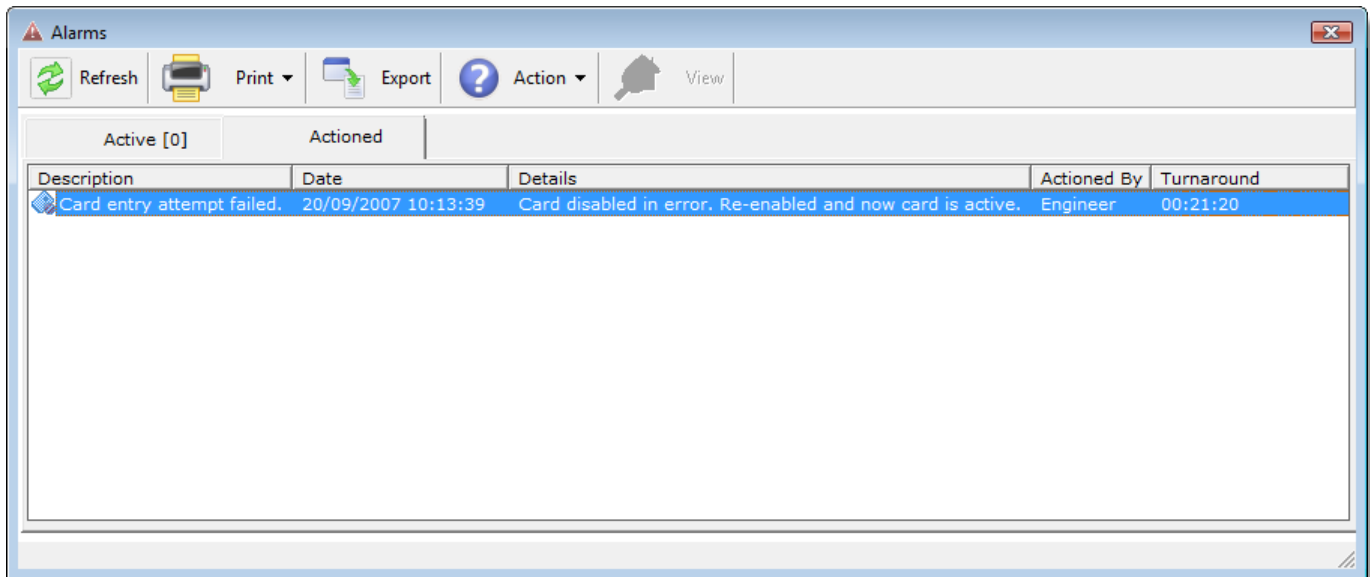
Creating a Floor Plan

A **Floor Plan** is a physical representation of your access control system. These can be viewed from the **Alarms**.

1 Add a new **Floor Plan.**
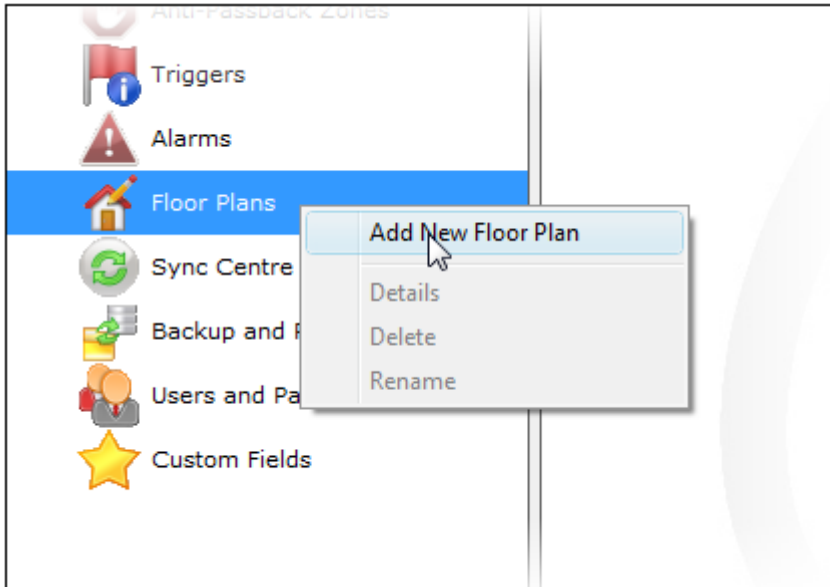
2 Enter a name for the plan, and select **Set Background** to browse for a suitable image.
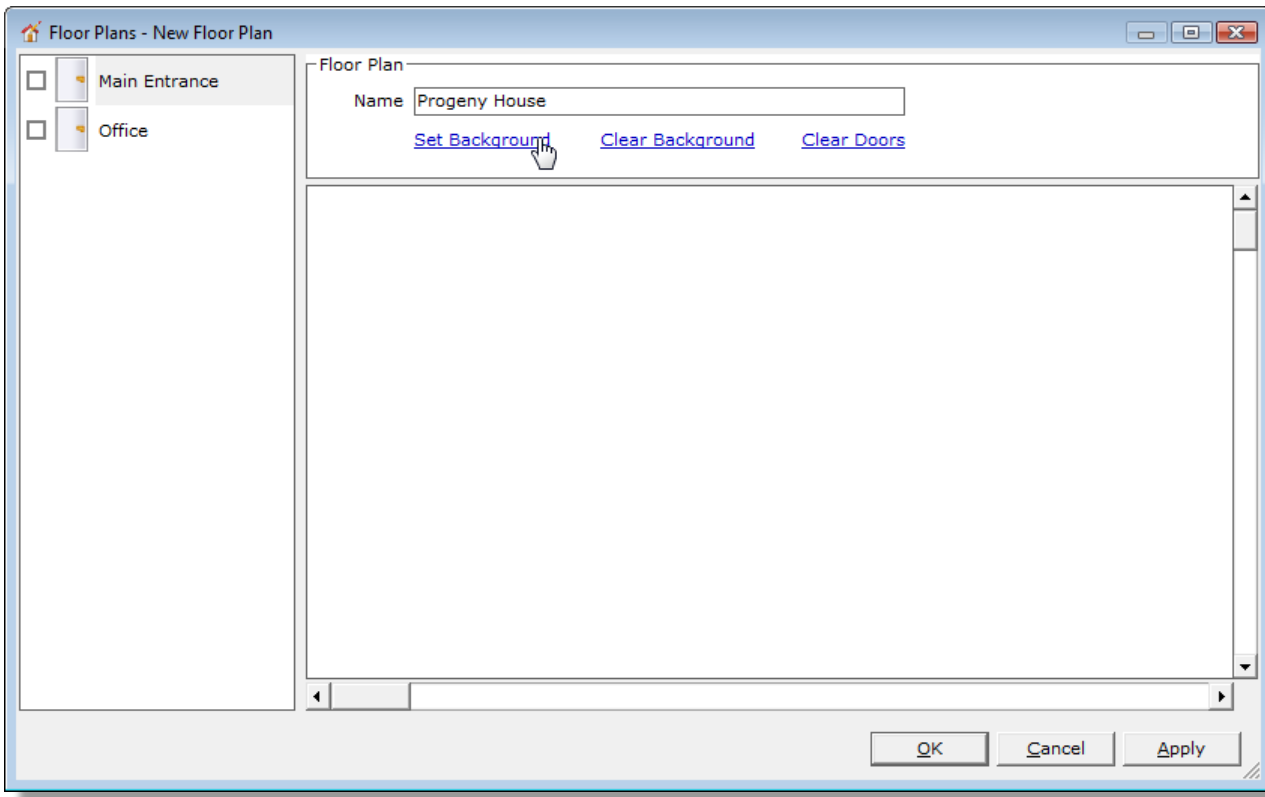
3   Select the required image and click **Open.**
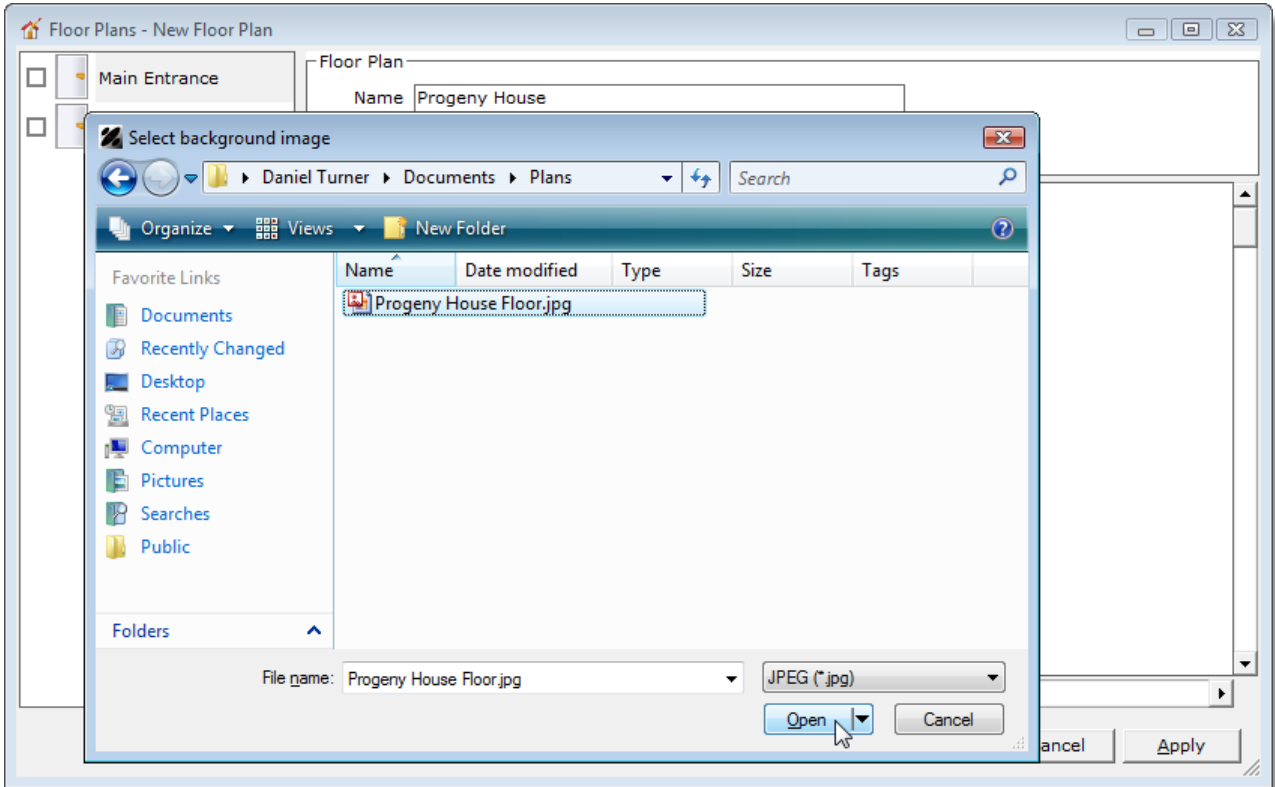
4   Add a door to the plan by ticking it on the left hand list, or dragging it directly onto the canvas. Position the door by holding down the left mouse button and dragging it to the required area.
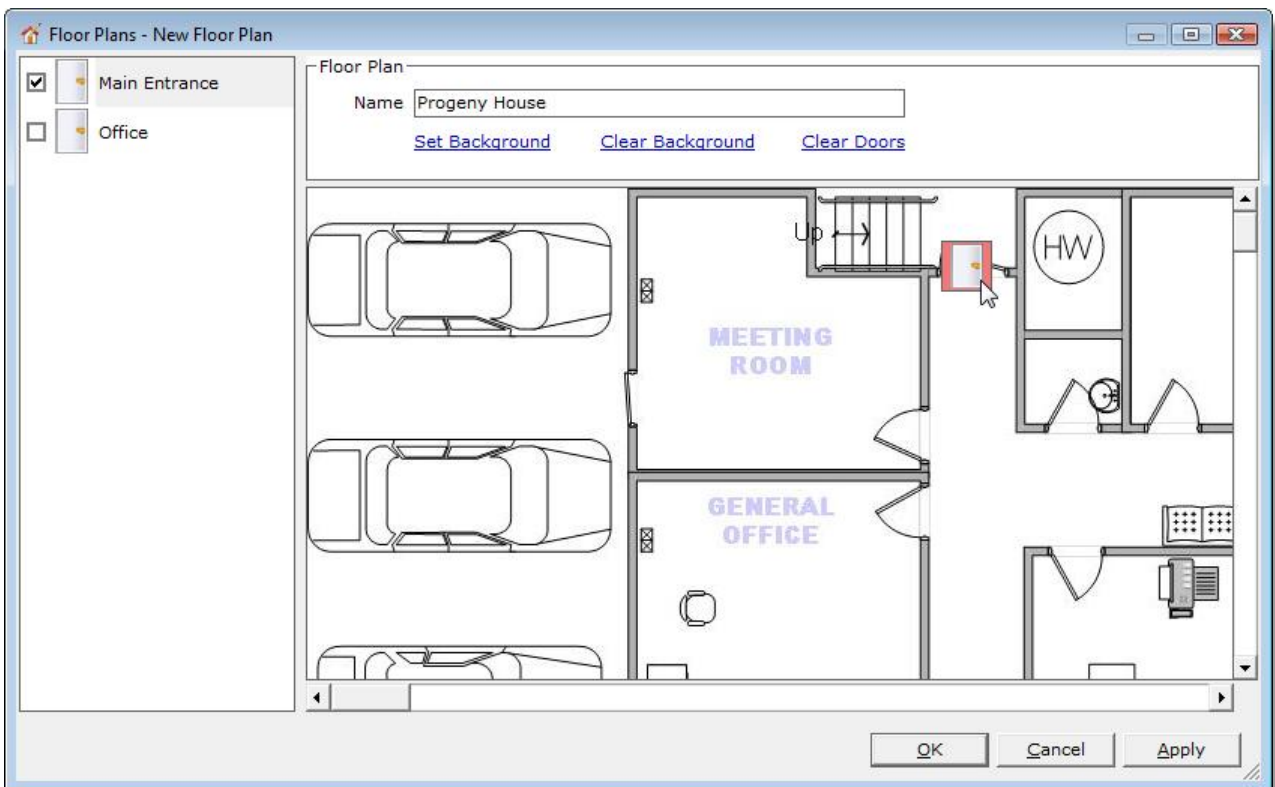
5 Add additional doors in the same way. Click **OK** to Save.
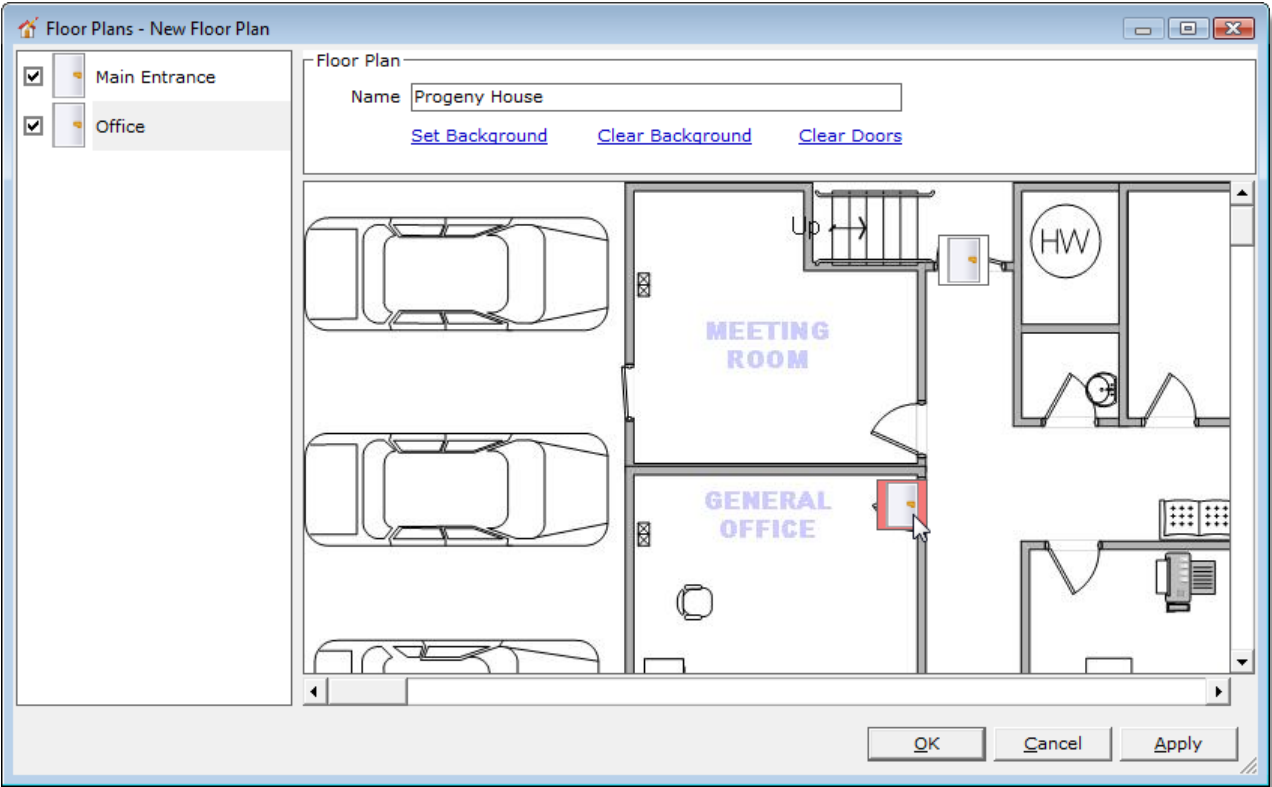
ⓟ Viewing an Alarm on a Floor Plan

In the following example, a trigger has been created as per Creating an Alarm, and an alarm raised using matching the conditions of this trigger. Like in Responding to an Alarm, the below screen is shown to all users with access to **Alarms.** Notice the **View** toolbar button is now enabled – this is because we have created a **Floor Plan** showing the door location.
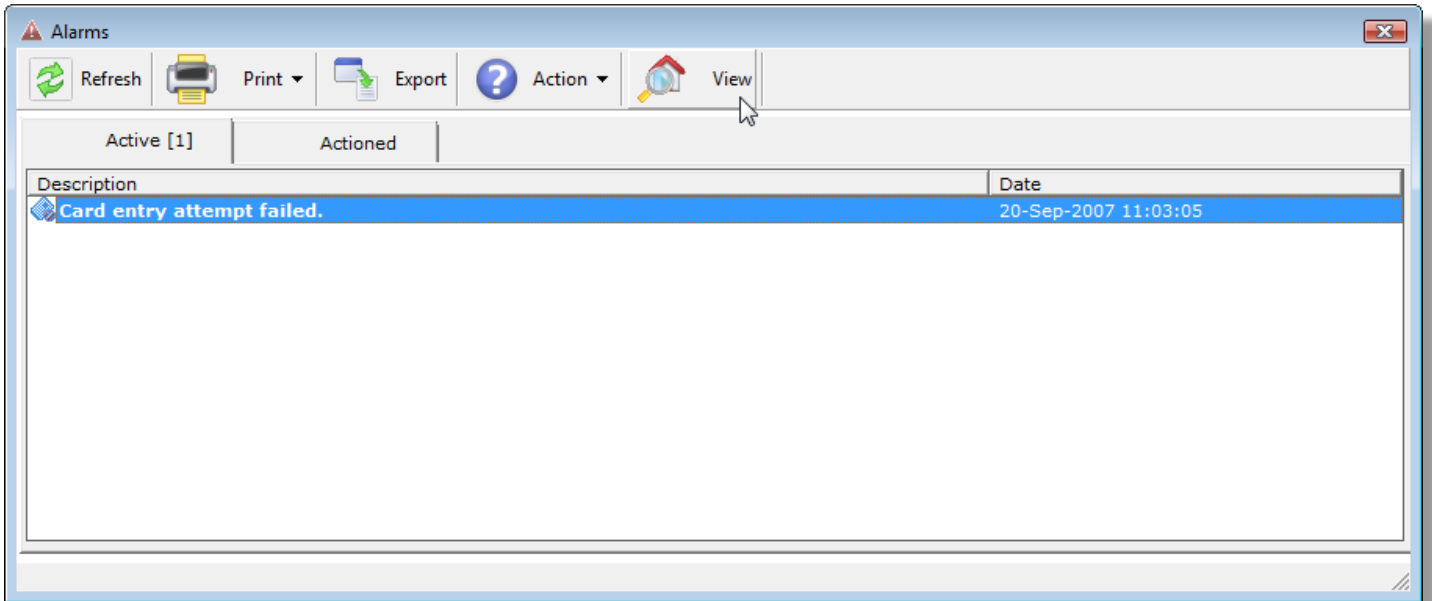
1
Click the **View** toolbar button. The **Floor Viewer** the highlight the affected door.
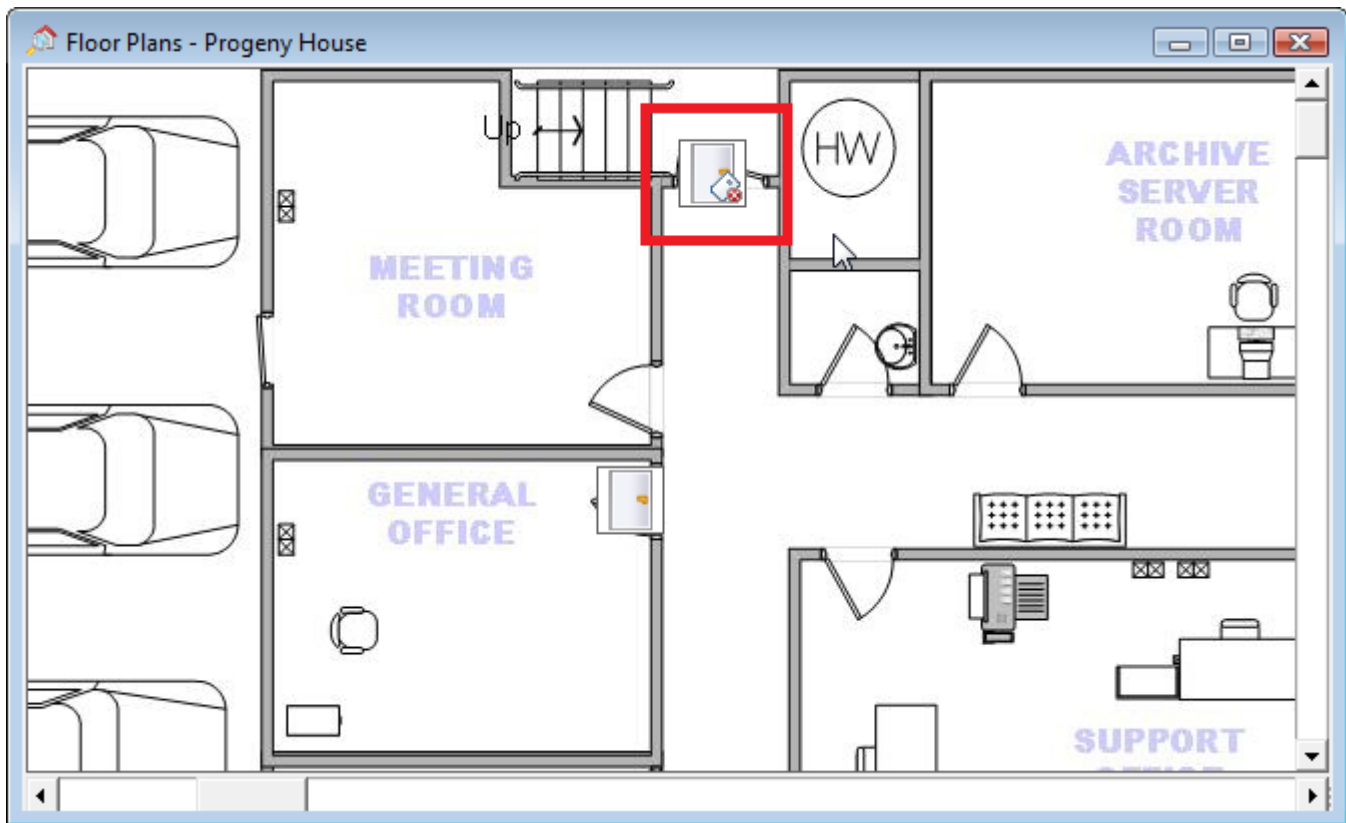
4.   Advanced Door Features

Adding a New Door

New Doors can be added in two ways. If you know the Controller ID, you can enter it directly by clicking **Add New Door** from the Doors Task Panel. Alternatively, **Search For Doors** will locate for any newly added doors. The below example shows this.

1 Click **Search For Doors** in the Doors Task Panel.
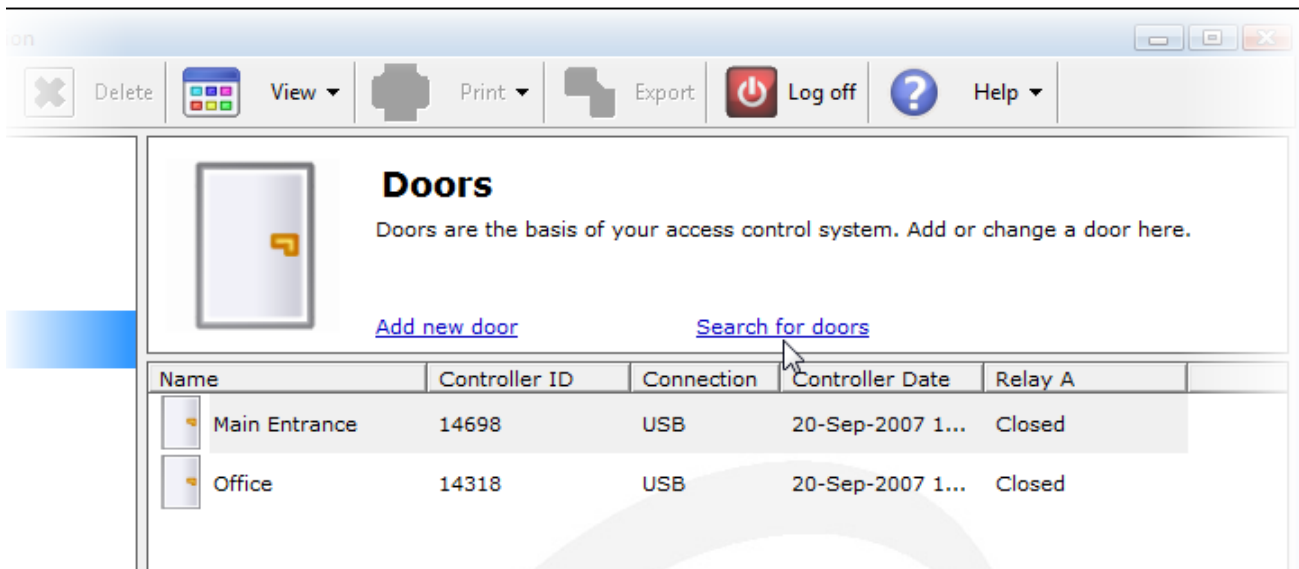
2 Doors Fortessa will check the available hardware channels. For additional IP address, use the "Add IP Address" button.
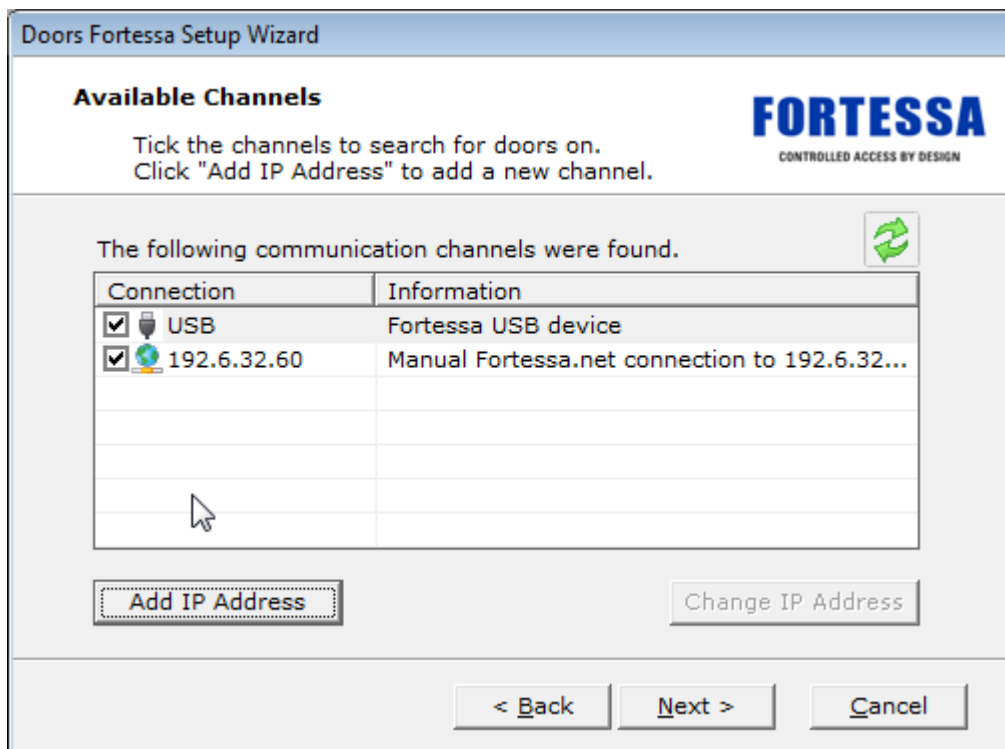
3 Click **Next** to begin. Any new doors will be added to the list.
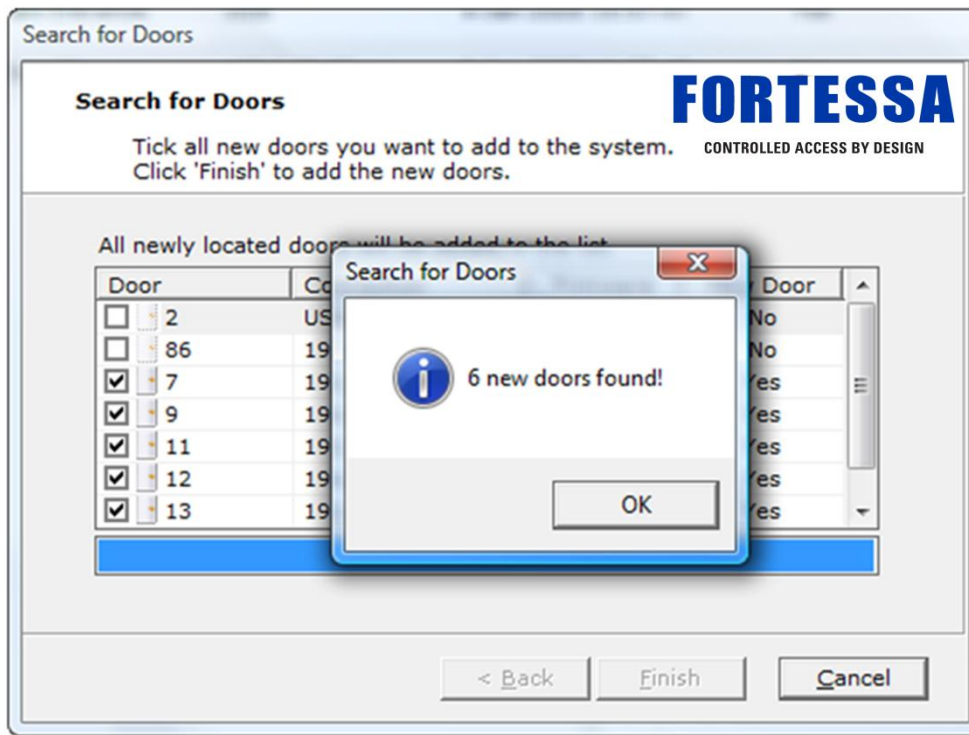
4

Click **Finish** to create the newly found doors, or **Back** to search again.

5

Rename the new door by right-clicking it in the System Tree.
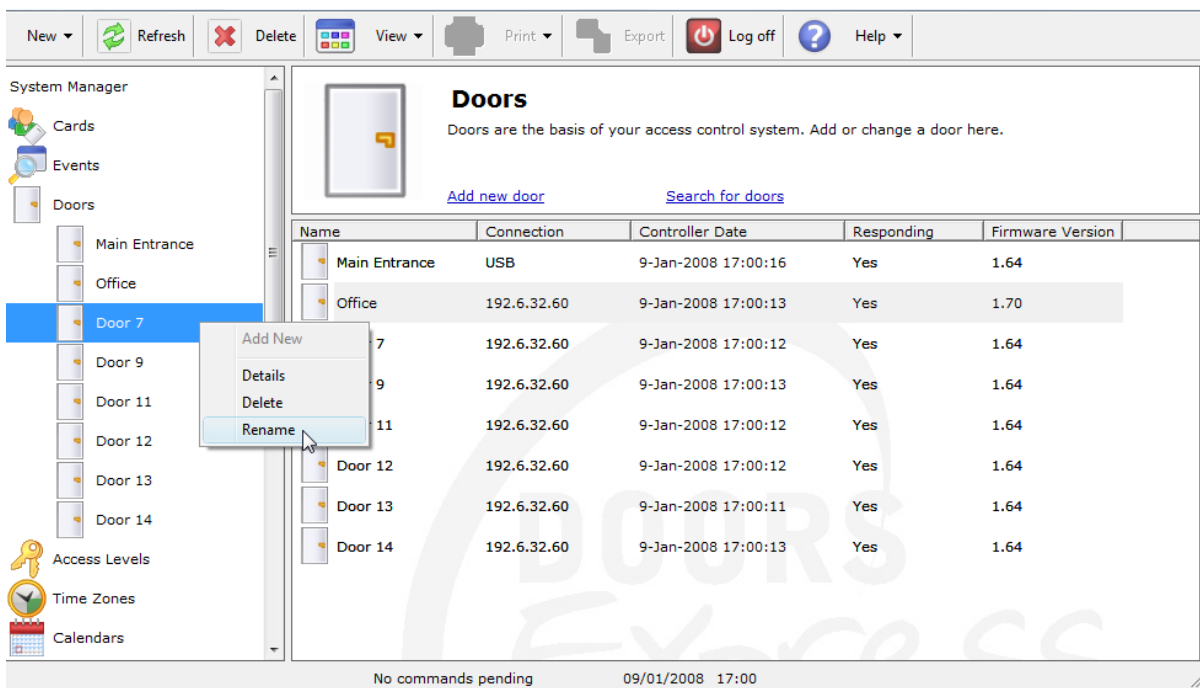
6 The new door details will be shown in the System List.

Updating a Door Using Sync Centre

After [Adding a New Door](), it is necessary to upload the card and configuration to it. This is done in **Sync Centre.**

1 Open **Sync Centre** from the [System Tree]().

2 Tick the **Send Card Details** and **Send Configuration**.

3 Click **OK**. As commands are sent to the door, the **Commands Pending** value will decrease. Commands can be deleted by clicking **Cancel Commands** if they are not required.

Release a Door During the Day

Extended door properties can be set in the **Advanced** tab in **Doors**. This is only visible if you are logged in as an Administrator.

1 Open the **Doors** screen.

2 Select the **Advanced** tab.

3 Tick the **Open during time zone** for **Relay A.** To create a new **Time Zone,** click the ⬚ button. Creating a time zone is detailed in steps 1-4 of [Restricting Card Access by Time](#). Select the required **Time Zone**.
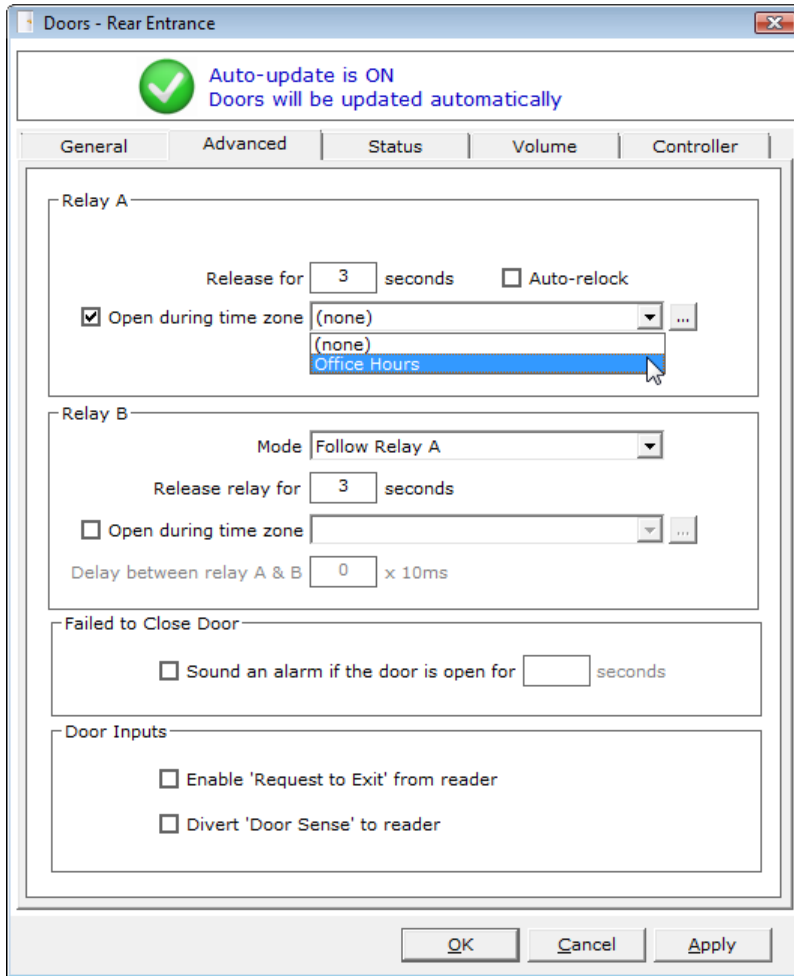
4 Click **OK.** Commands will be sent to the door instructing it to open during the "Office Hours" **Time Zone.**

Viewing Door Status

The current status of a door can be viewed **Status** tab.

 Open the **Doors** screen.

 Select the **Status** tab. Notice the **Time Zone** is active for **Relay A,** as set in Release a Door During the Day. **Relay B** is open because it is set to follow **Relay A**'s state.

3 Present an enabled card to **Reader A.** Watch the **Timer** in **Relay A.**

```
┌─Relay A (Out)────────────────────────────────────────────┐
│  ┌──────────┐   ┌────────────────────┐                    │
│  │   Open   │   │  PC Latch │ Closed │                    │
│  └──────────┘   └────────────────────┘                    │
│  ┌──────────┐   ┌────────────────────┐                    │
│  │ Release  │   │   Timer   │   On   │                    │
│  └──────────┘   └────────────────────┘                    │
│  ┌─────────────────────────┐ ┌───────┐                    │
│  │ Time Zone (Office Hours) │ │  On  │                    │
│  └─────────────────────────┘ └───────┘                    │
│                               ┌──────────────┐            │
│                               │ Relay A │ Open │          │
│                               └──────────────┘            │
└───────────────────────────────────────────────────────────┘
```

Three seconds later (again, as specified in Release a Door During the Day), the timer will be set to **Off.**

```
┌─Relay A (Out)────────────────────────────────────────────┐
│  ┌──────────┐   ┌────────────────────┐                    │
│  │   Open   │   │  PC Latch │ Closed │                    │
│  └──────────┘   └────────────────────┘                    │
│  ┌──────────┐   ┌────────────────────┐                    │
│  │ Release  │   │   Timer   │  Off   │                    │
│  └──────────┘   └────────────────────┘                    │
│  ┌─────────────────────────┐ ┌───────┐                    │
│  │ Time Zone (Office Hours) │ │  On  │                    │
│  └─────────────────────────┘ └───────┘                    │
│                               ┌──────────────┐            │
│                               │ Relay A │ Open │          │
│                               └──────────────┘            │
└───────────────────────────────────────────────────────────┘
```

Opening and Closing a Door from Doors Fortessa

The door lock can be controlled by using the **Open, Close** and **Release** buttons in the **Status** tab.

1   Repeat Release a Door During the Day, setting the **Time Zone** to be "none". Click **Apply** to ensure the door has been updated with this change. This is done to show the lock relay opening without a time zone affecting it, and as such would not be necessary under normal circumstances.

2   Select the **Status** tab. Notice the **Time Zone** is inactive for **Relay A,** and the lock is closed.

3 Click **Open.** The **PC Latch** will open. This in turn will open **Relay A** indefinitely.
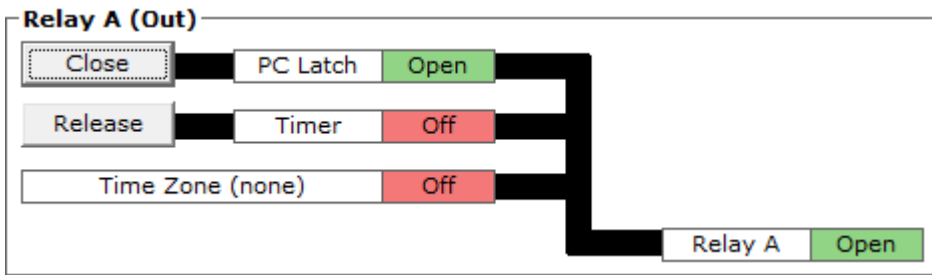
4 Click **Close.** The **PC Latch** will close. This in turn will close **Relay A**.

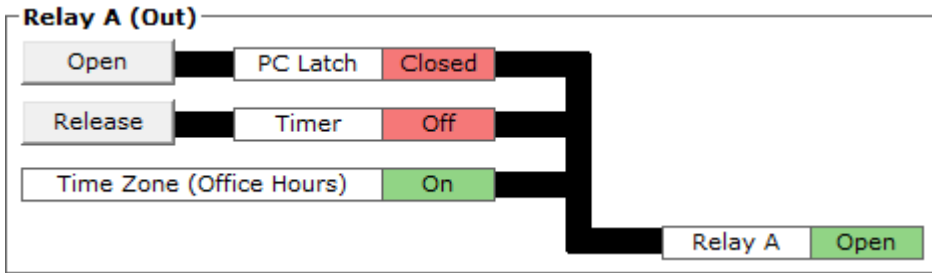**5** Present an enabled card to **Reader A.** Watch the **Timer** in **Relay A.**
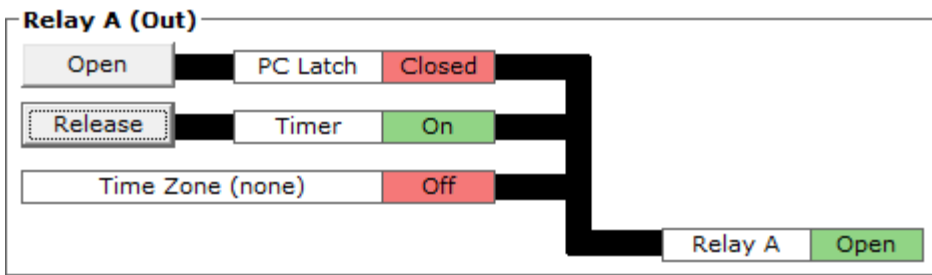
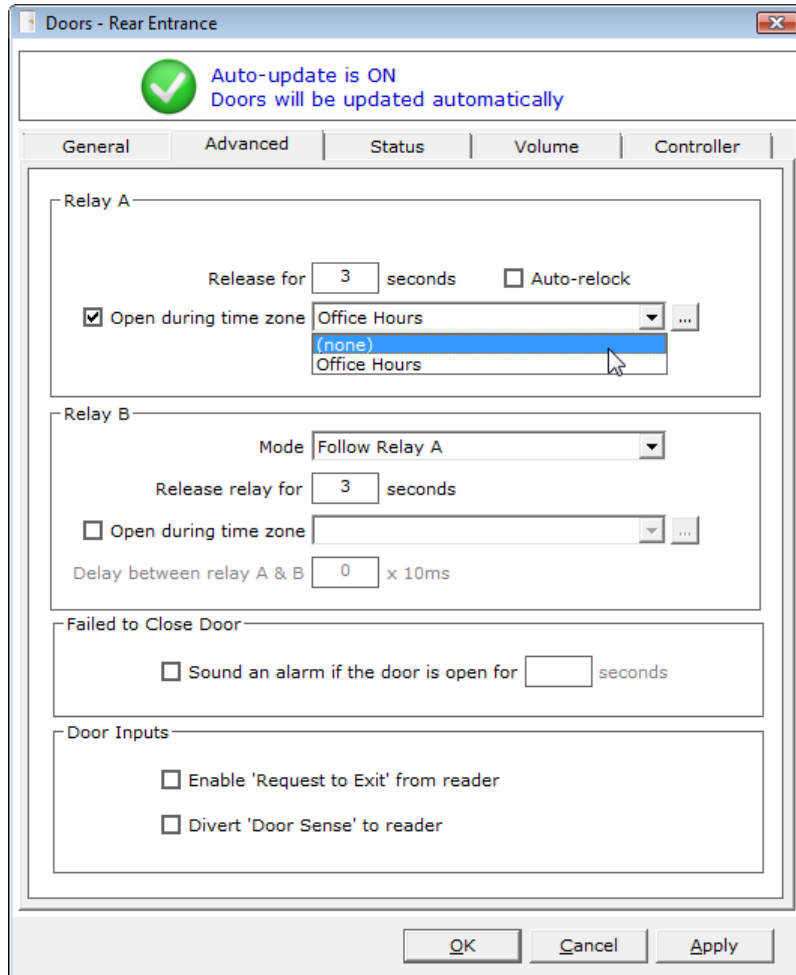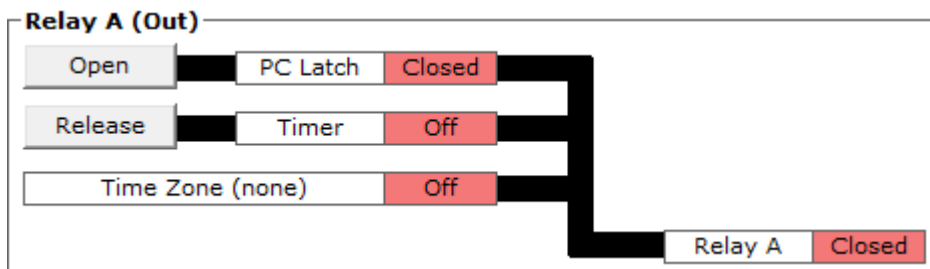Three seconds later (again, as specified in Release a Door During the Day), the timer will be set to **Off.**
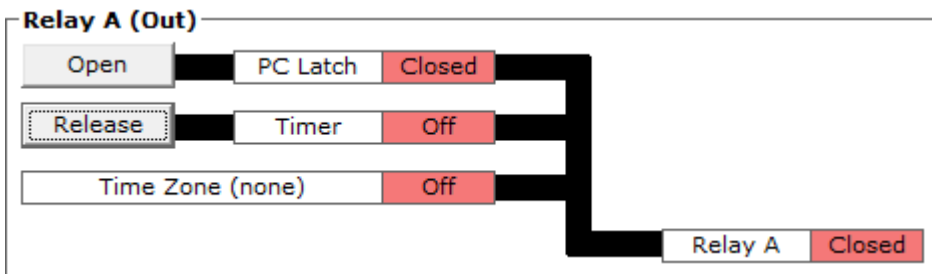
Changing the Controller Volume

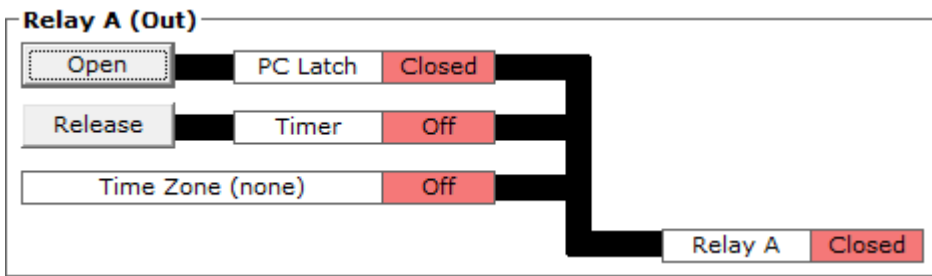The volume of the controller and readers can be changed from the **Volume** tab.

1   Open the **Doors** screen.
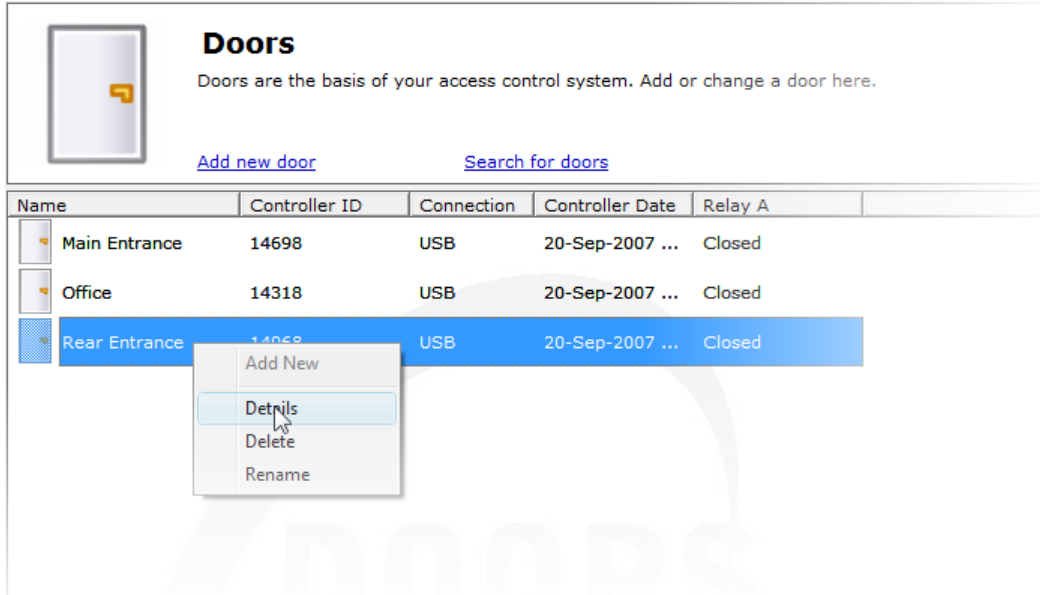
2   Select the **Volume** tab. Alter the level **Alarms** (such as Door Not Closed), and **Feedback** (when a card is presented). Click **OK** to save and update the door.

A Resetting a Door's Memory

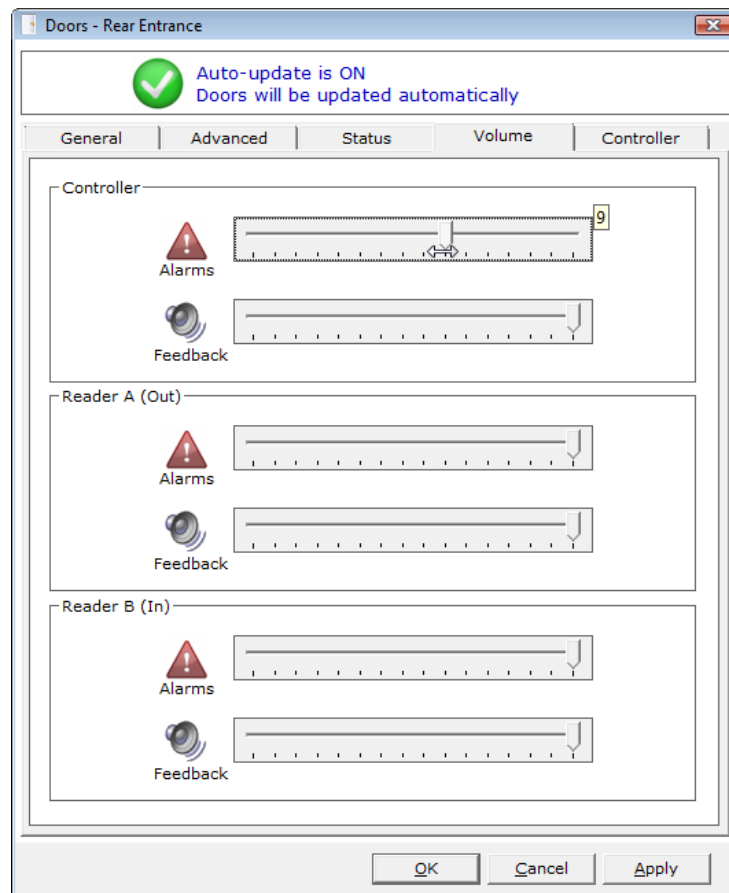Whilst the memory on door controller can be cleared using the Reset button, this may not be easily accessible. The **Controller** tab in **Doors** allows cards, configuration and event data to be cleared. It also provides information about any active **Time Zones**.

1 Open the **Doors** screen.
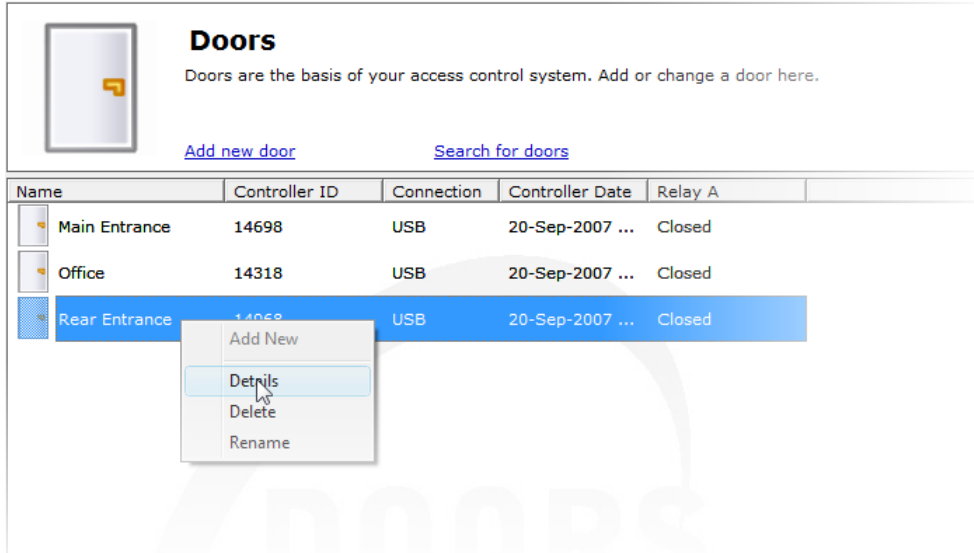
2 Select the **Controller** tab. In this example, the **Time Zone, Access Level** and **Calendar** information will be reset. Notice **Time Zone 1** is active.
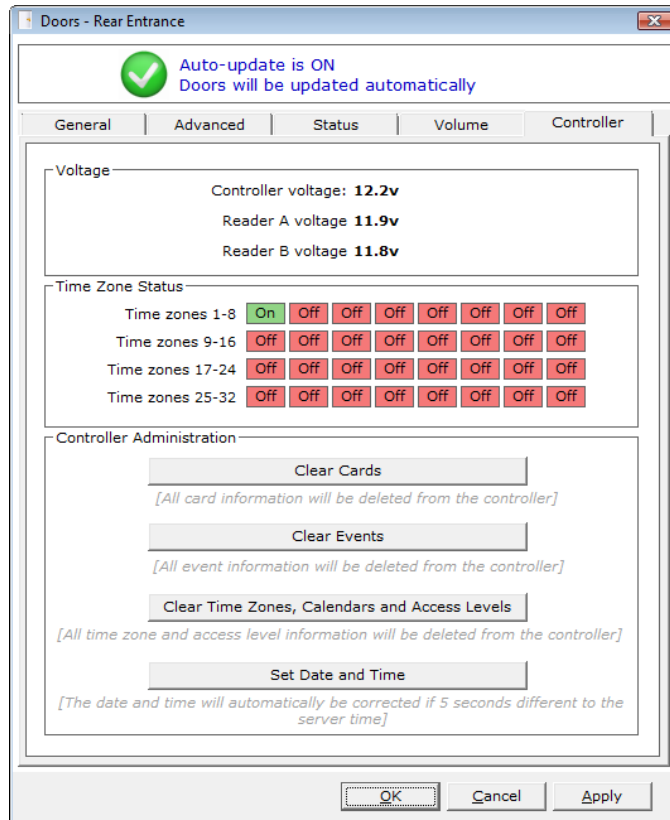
3   Click **Clear Time Zones, Calendars and Access Levels.** The password all reset functions is **749162.**

4   The command has now been sent. All **Access Level**, **Calendar** and **Time Zone** information has been removed. The first time zone is now off.
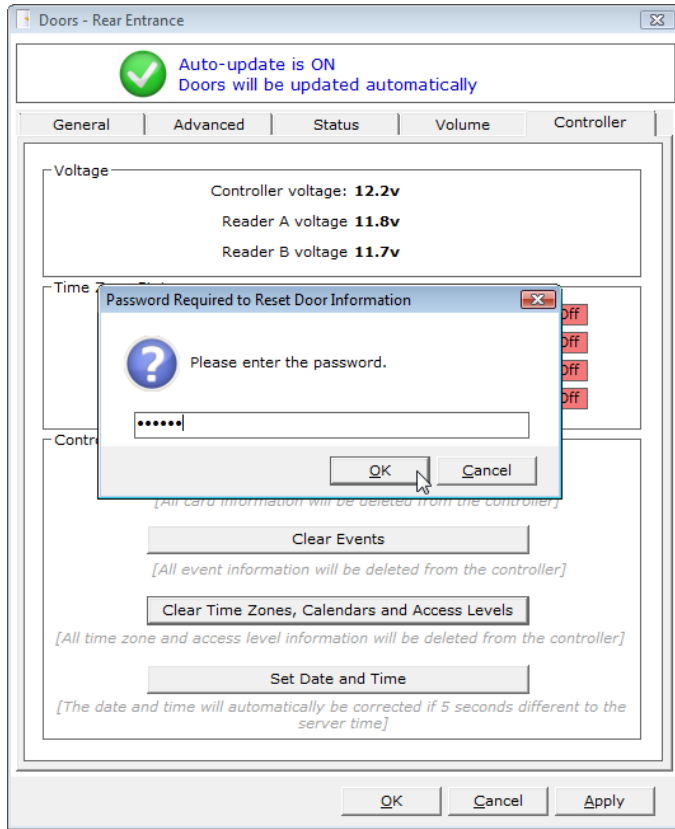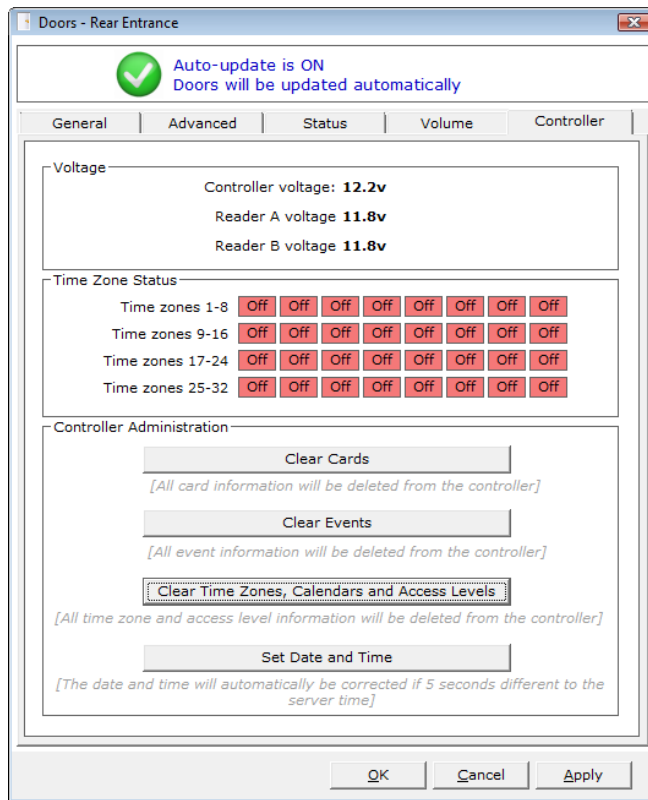
5. Ⓐ Administrator Functions

Administrator logins are able to create new users, schedule backups and organise software updates.

Restricting Access to Doors Fortessa

New logins can be created, and existing login details can be updated in **Users and Passwords.**

1 Double-click **Users and Passwords** in the System List.
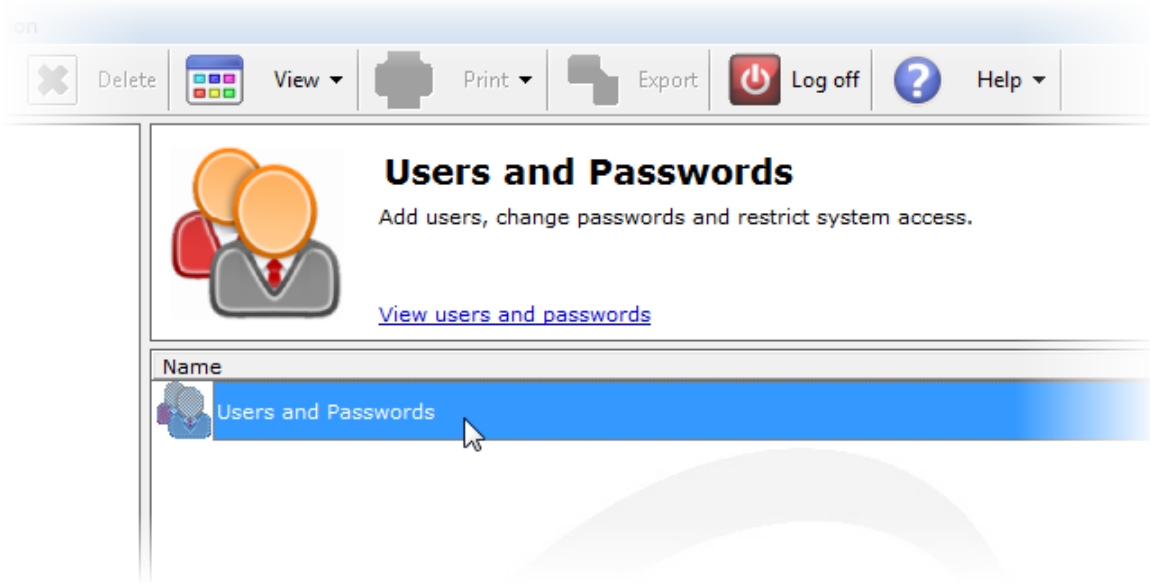
2 Click **Add** to create a new user, or **Properties** to edit an existing one.
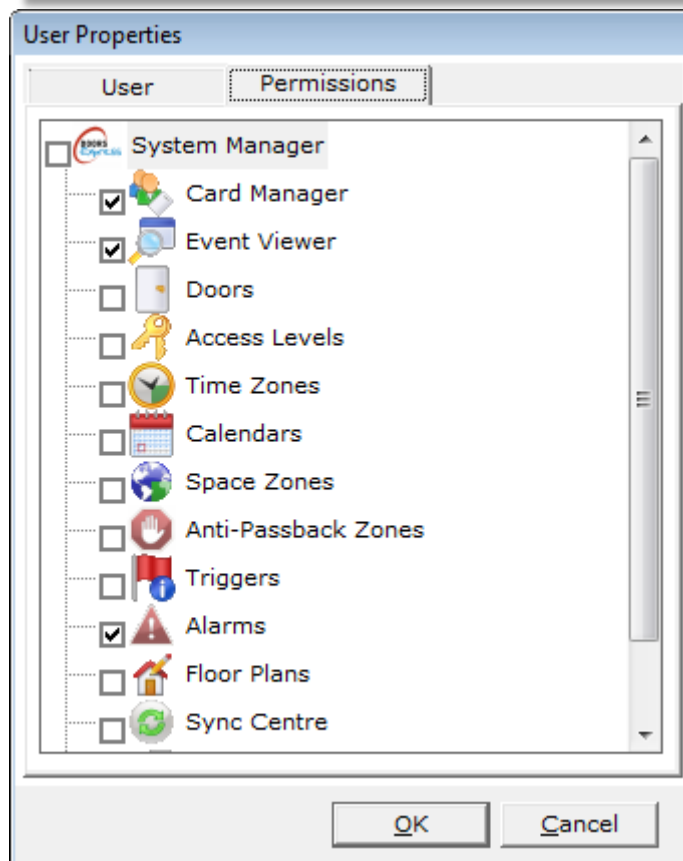
3 Add the **User Name** and **Password** for the user. Select the areas of the software that this user can access in **Permissions**. Click OK.

4 The user has been added to the list. Click **OK** to save.
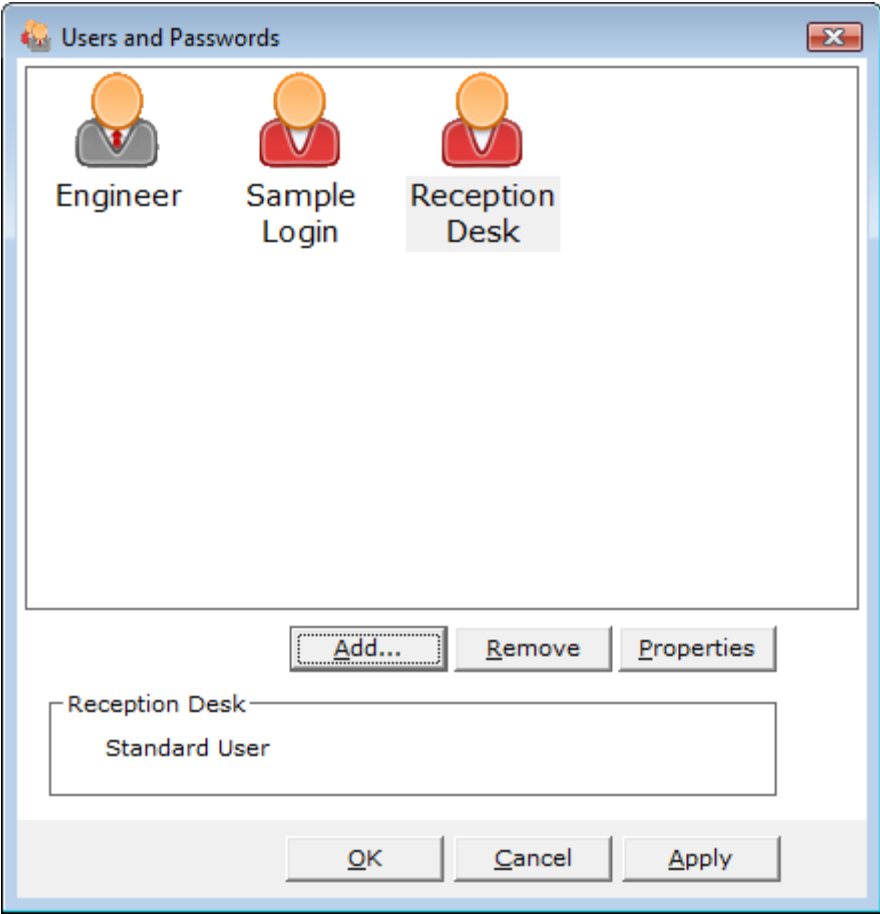
Backing up and Restoring Data

This is managed in the Backup and Restore Section.
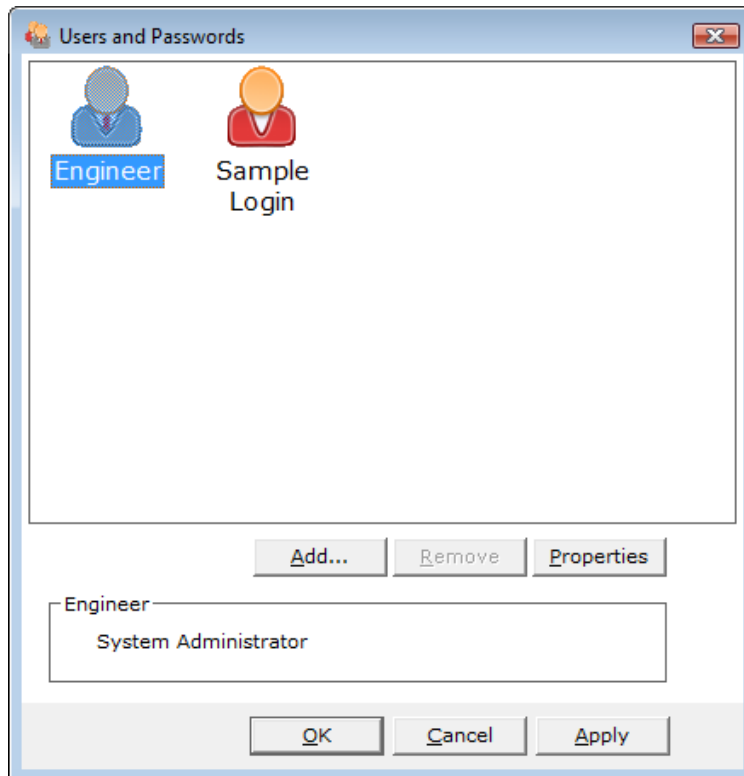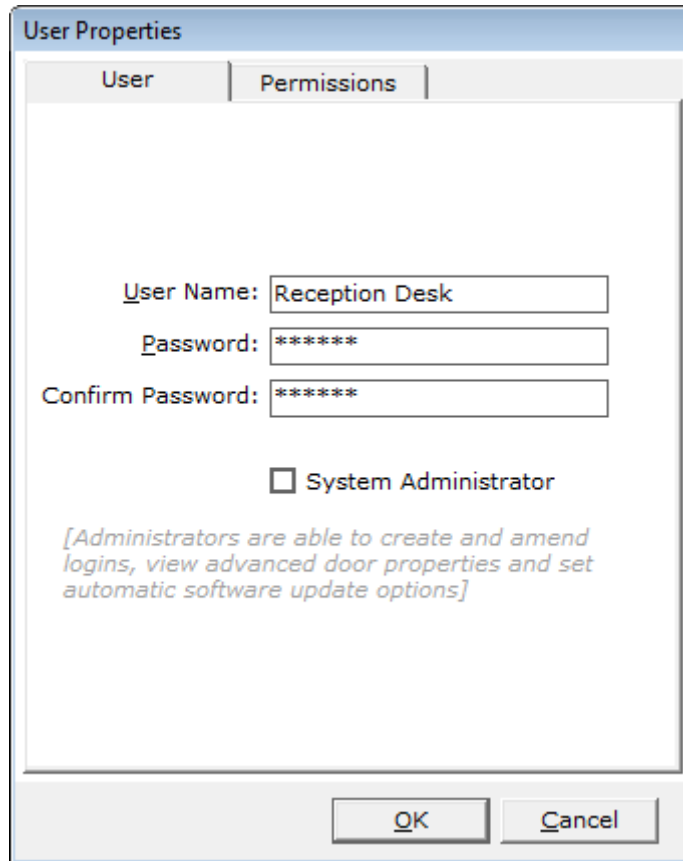
Creating a backup

1 Open Backup and Restore by double-clicking it in the System List.
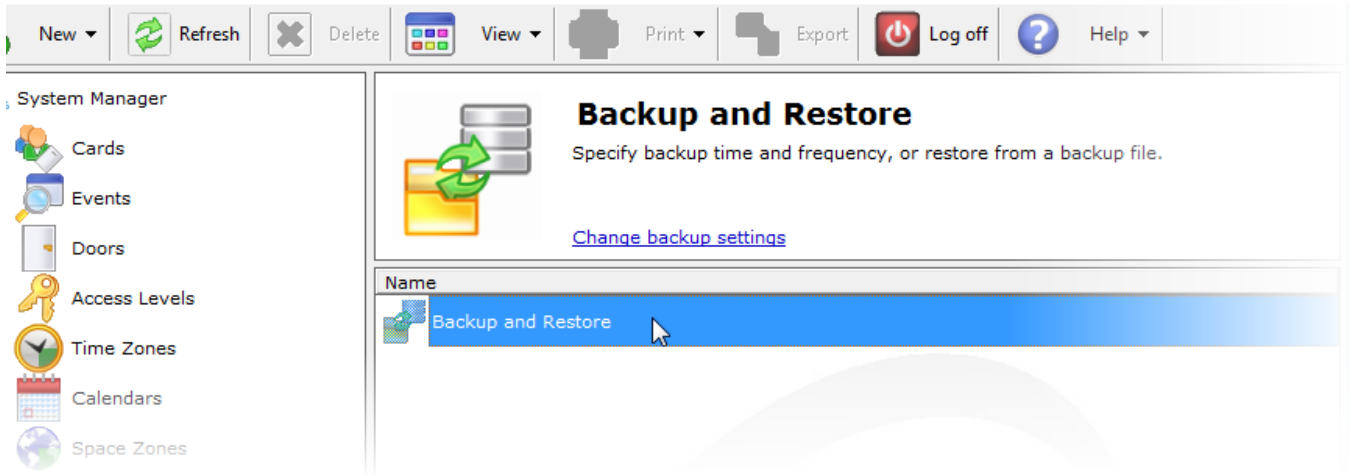
2 Select the **Settings** tab to set an automatic backup time or alter the backup details. Choose whether to include photos, plans and card designs as part of **Automated Backups**. These will always be included when making a manual backup.
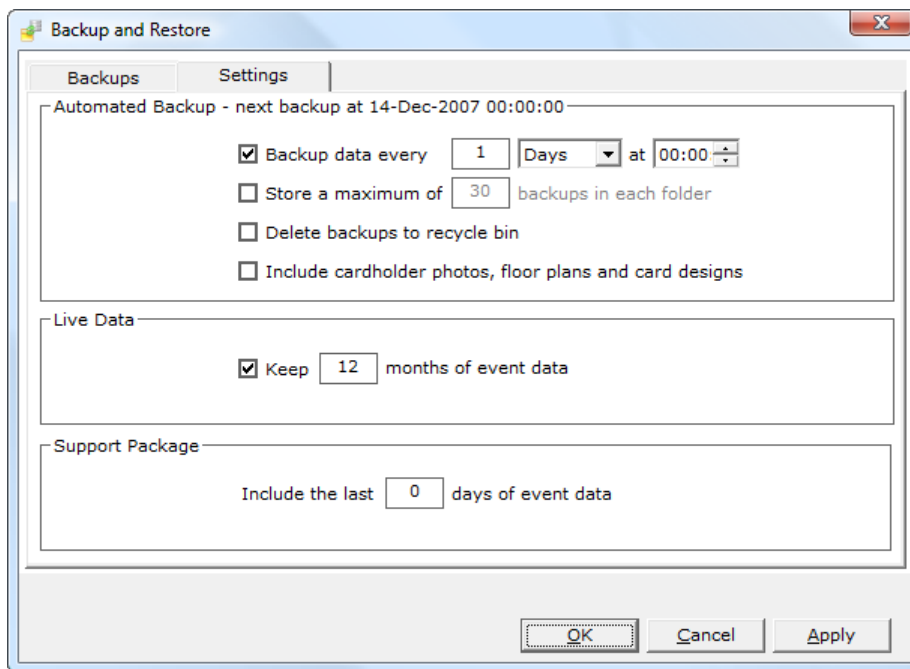
3 Select the **Backups** tab, and click the **Backup** button.
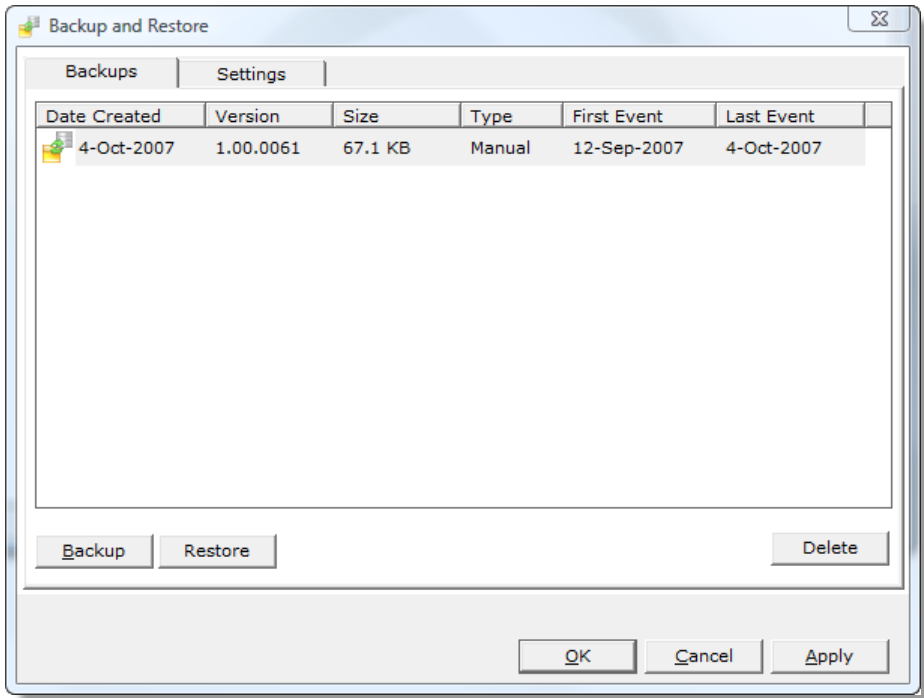
Restoring a backup

1 Click **Restore** from the **Backups** tab. Click **Yes.**
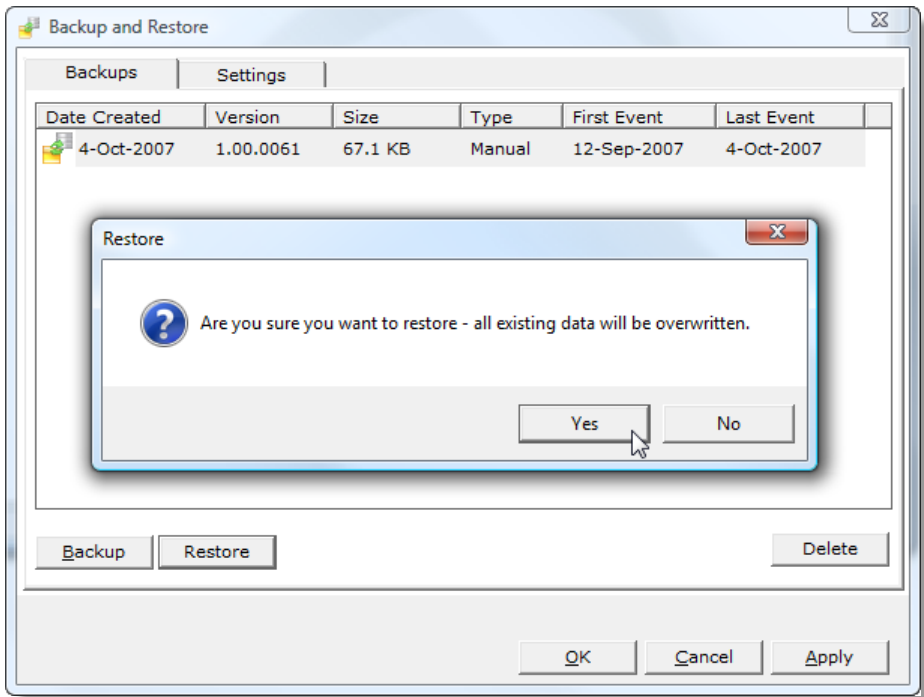
2 The restore process will commence.
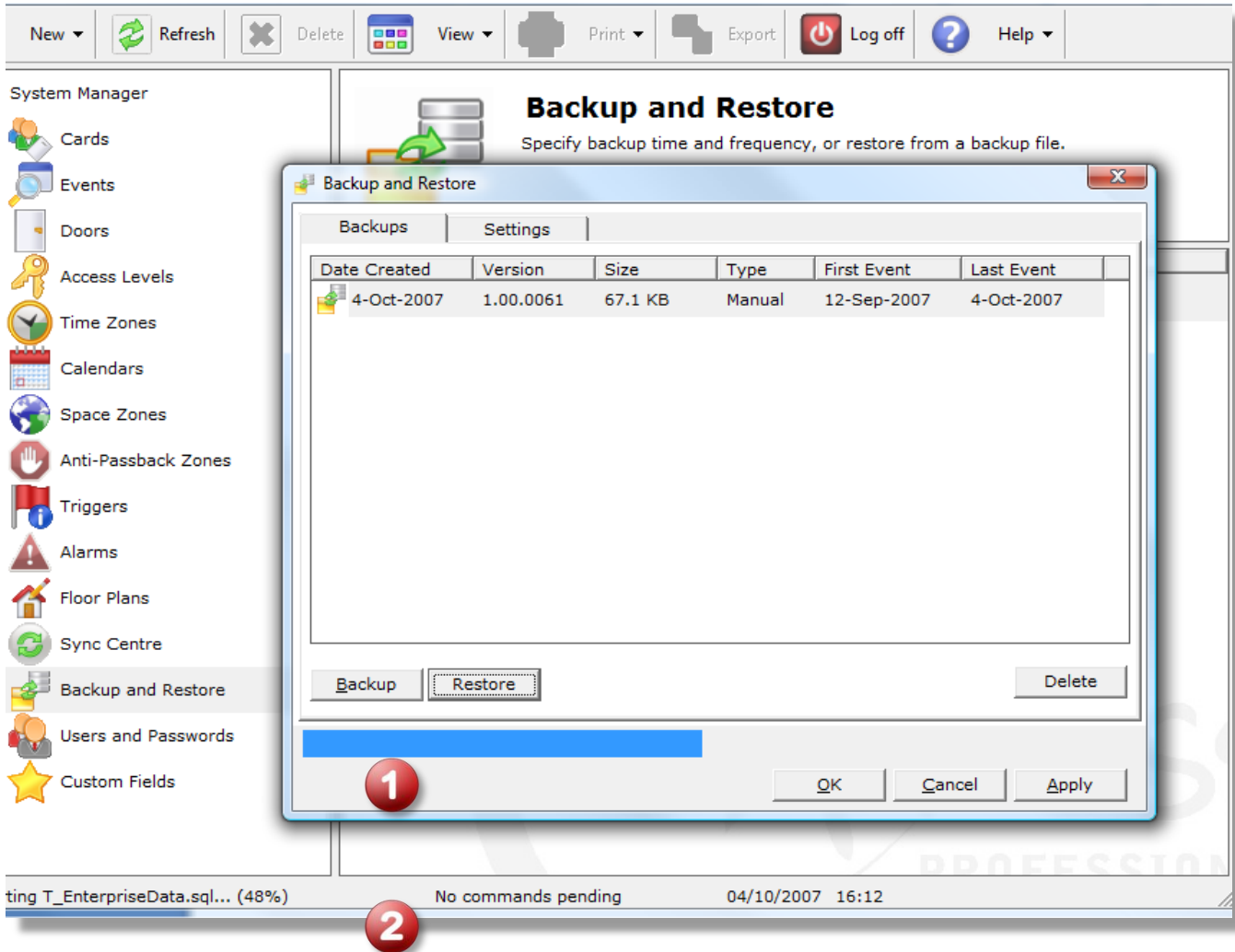
1 Overall progress

2 Current operation

3 Click **OK** to complete the restore process.
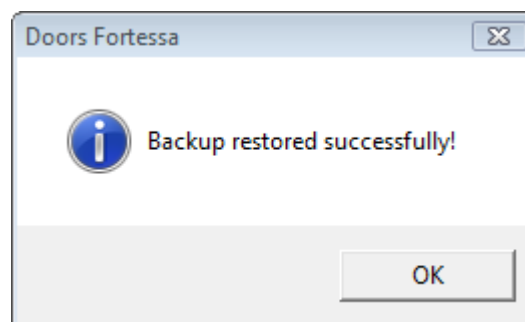
Checking for Software Updates

It is possible to download software updates containing enhancements and new features. Although this can be scheduled to run automatically, an update check can be performed at any time.

Performing a manual check

1 Click **Software Update Settings** from the **System Manager** Information Panel.
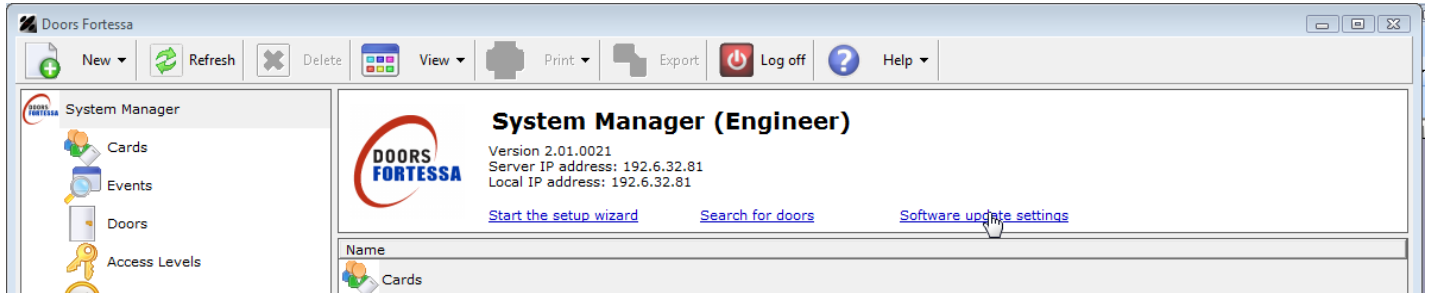
2 Click **Check Now.**
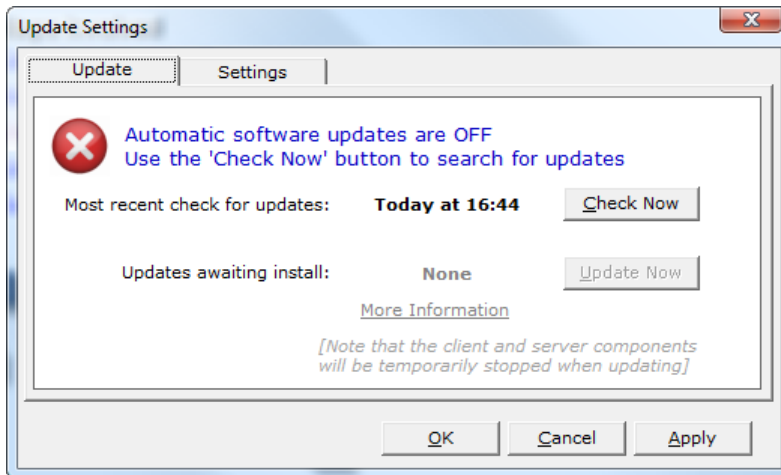
3 If an update is available it will be downloaded.
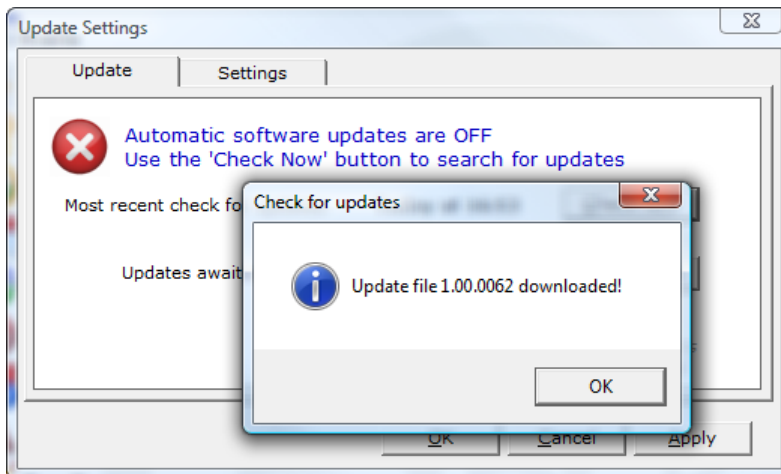
Installing updates

 Click **Update Now.**
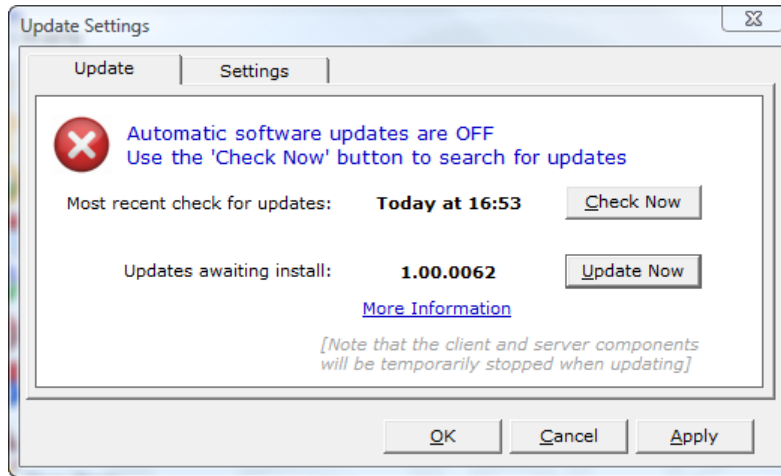
 Ensure all other users are either logged off or are not affected by the update. Click **Yes** to continue.
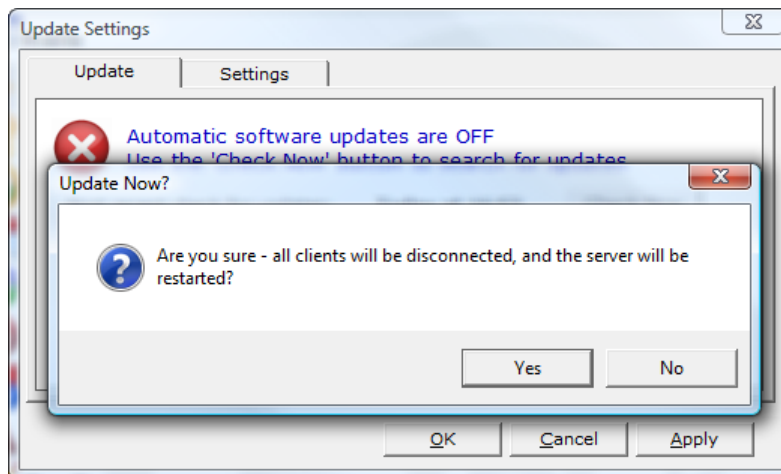
3 All clients will be stopped whilst the server starts the update process.
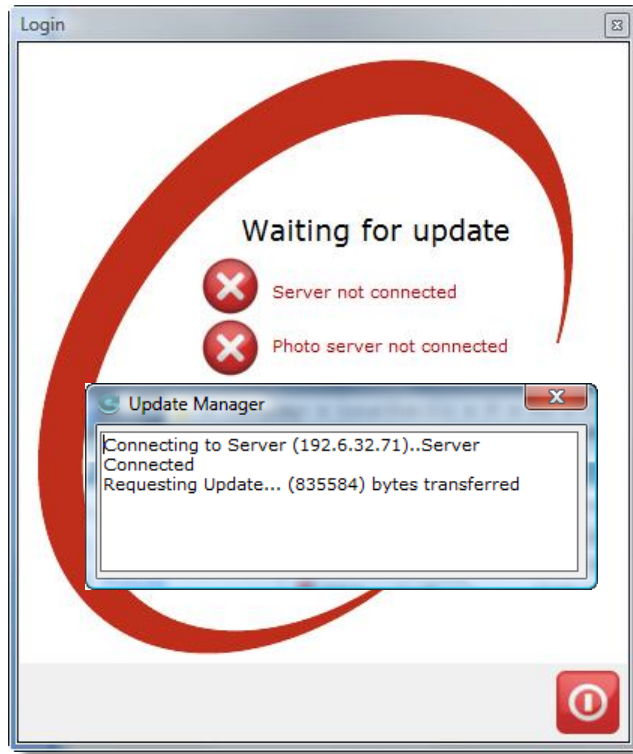
4 The update process is complete. Users can log in as normal.

1.   Printing Roll Call Reports and Creating Time Sheets

Using Space Zones

A **Space Zone** is a group of doors. Reports can be created to identify which cardholders are currently in the building. In the event of a fire alarm these doors can be opened automatically provided the fire input of a controller is connected to the fire alarm system. Doors Fortessa creates a standard space zone called **Roll Call**. As doors are added to the system, they are included in this zone.

Creating a Roll Call Report

Open the **Roll Call** zone by right-clicking the System Tree.
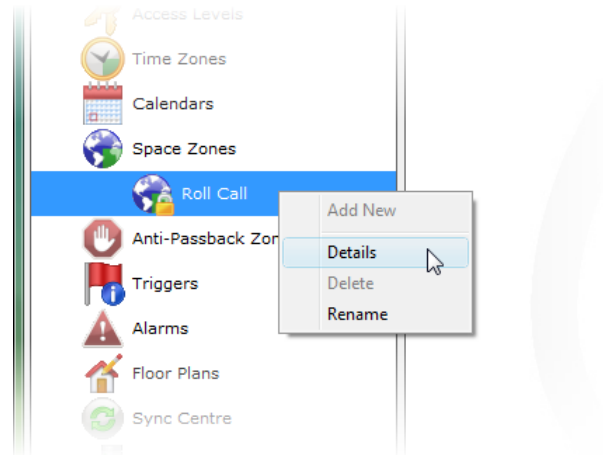
Select the **Doors** tab. Tick all doors to be included in this **Space Zone**.
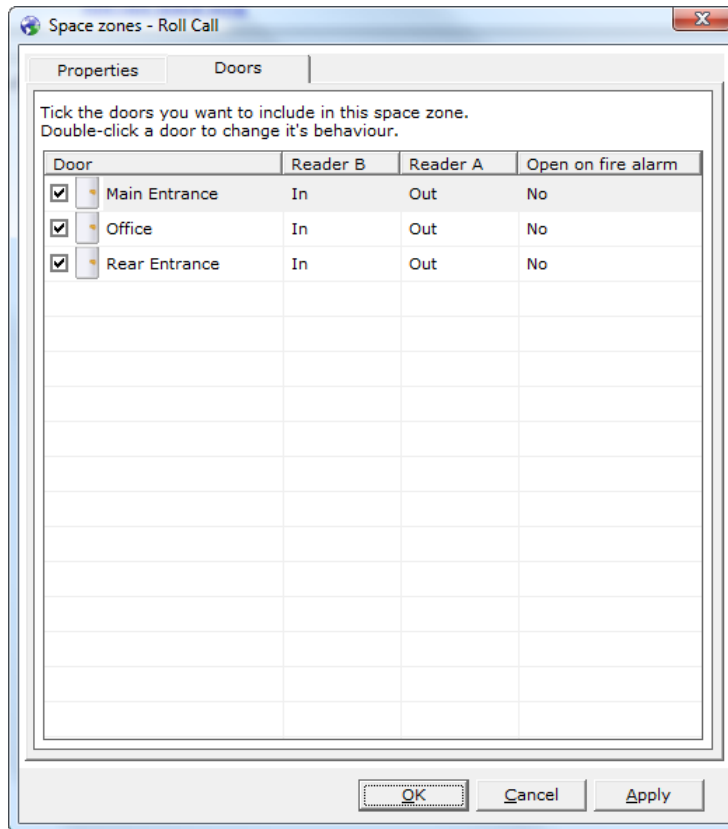
Double-click a door to change the behaviour. Click **OK.**
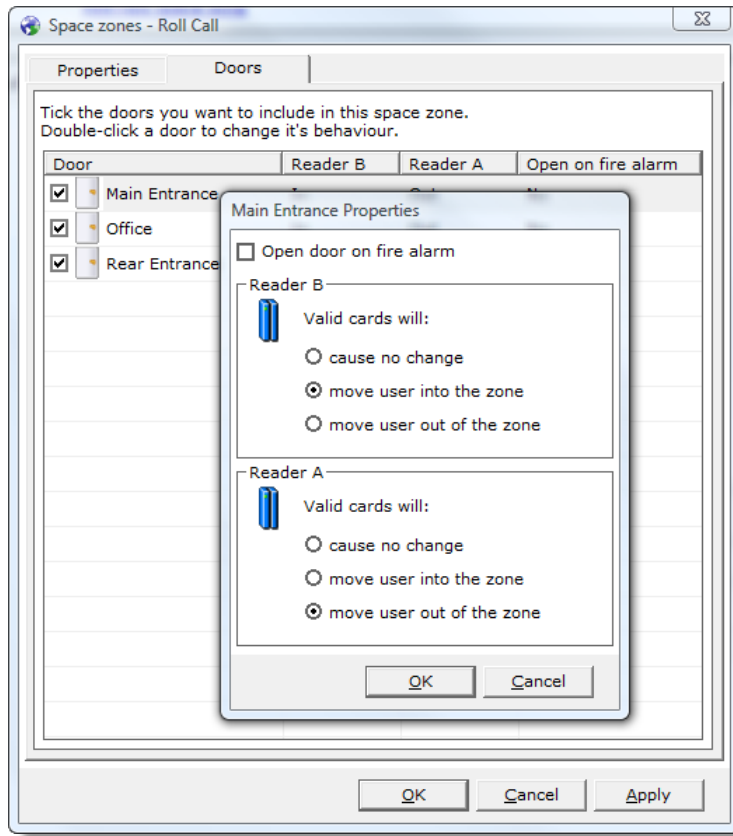
Click **OK** to save. Open a new **Event Viewer** report (detailed further in Creating a Custom Report).

Select **Settings** from the toolbar.
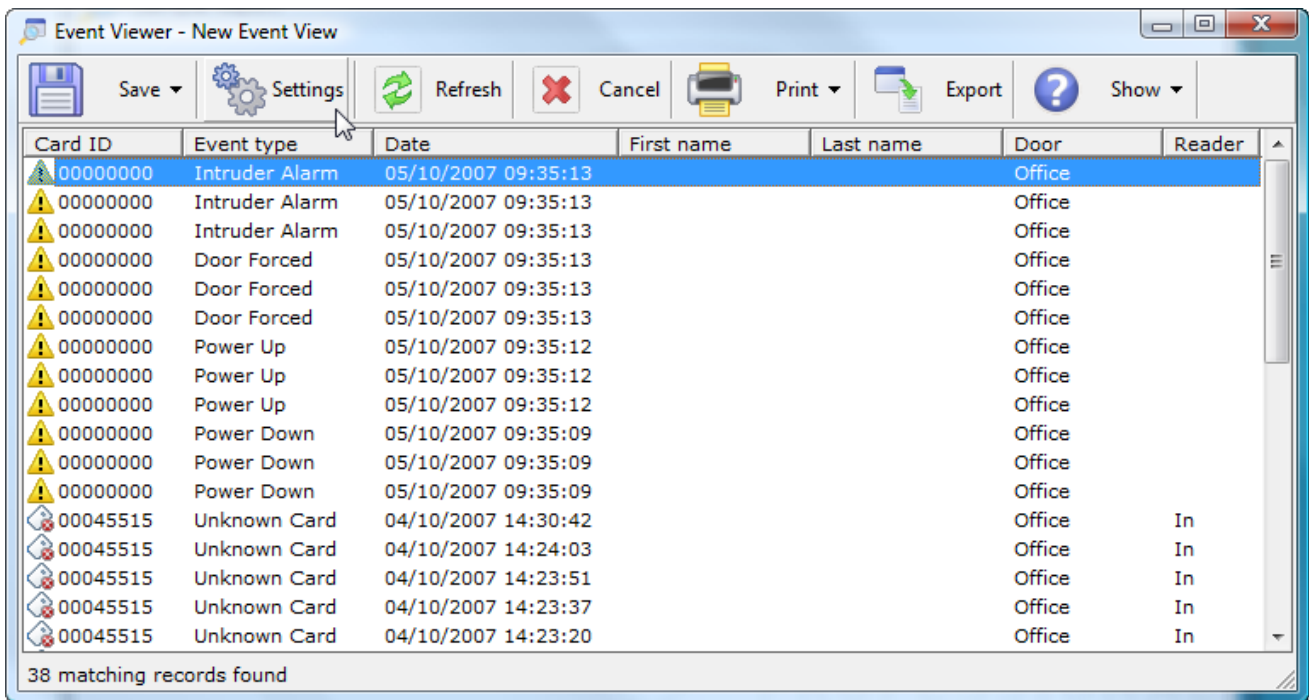
6

Change the report type to **Zoned Roll Call.** Click **OK.**
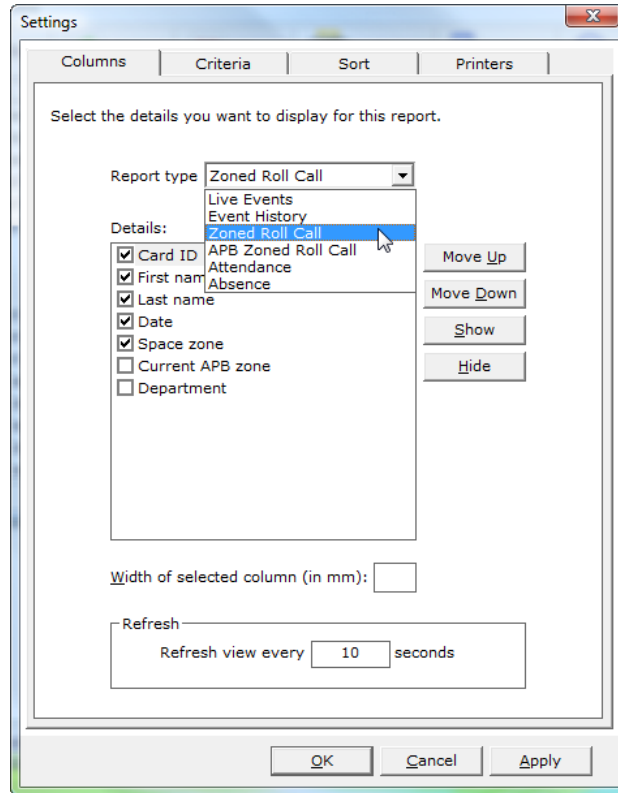
7

Enter a report name. Click **OK.**
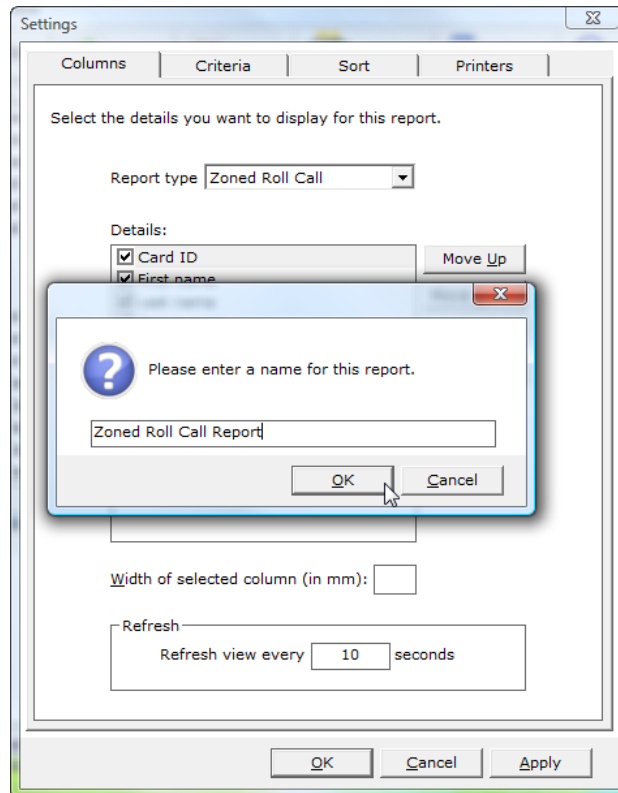
8   View the results.

Creating a Time Sheet

A time sheet can be created based on users' movements. The basis for a time sheet is a space zone – this dictates which readers will move a cardholder "in", and which will move them "out". A dedicated P3 controller may be used purely for this purpose, although this is not a requirement.

1   Ensure a Space Zone is available that monitors the appropriate readers to move in and out of the building. This is detailed further at the beginning of this section.

2   Right-click **Time Sheet**, located in **Card Manager**, and select **Add New Time Sheet.**
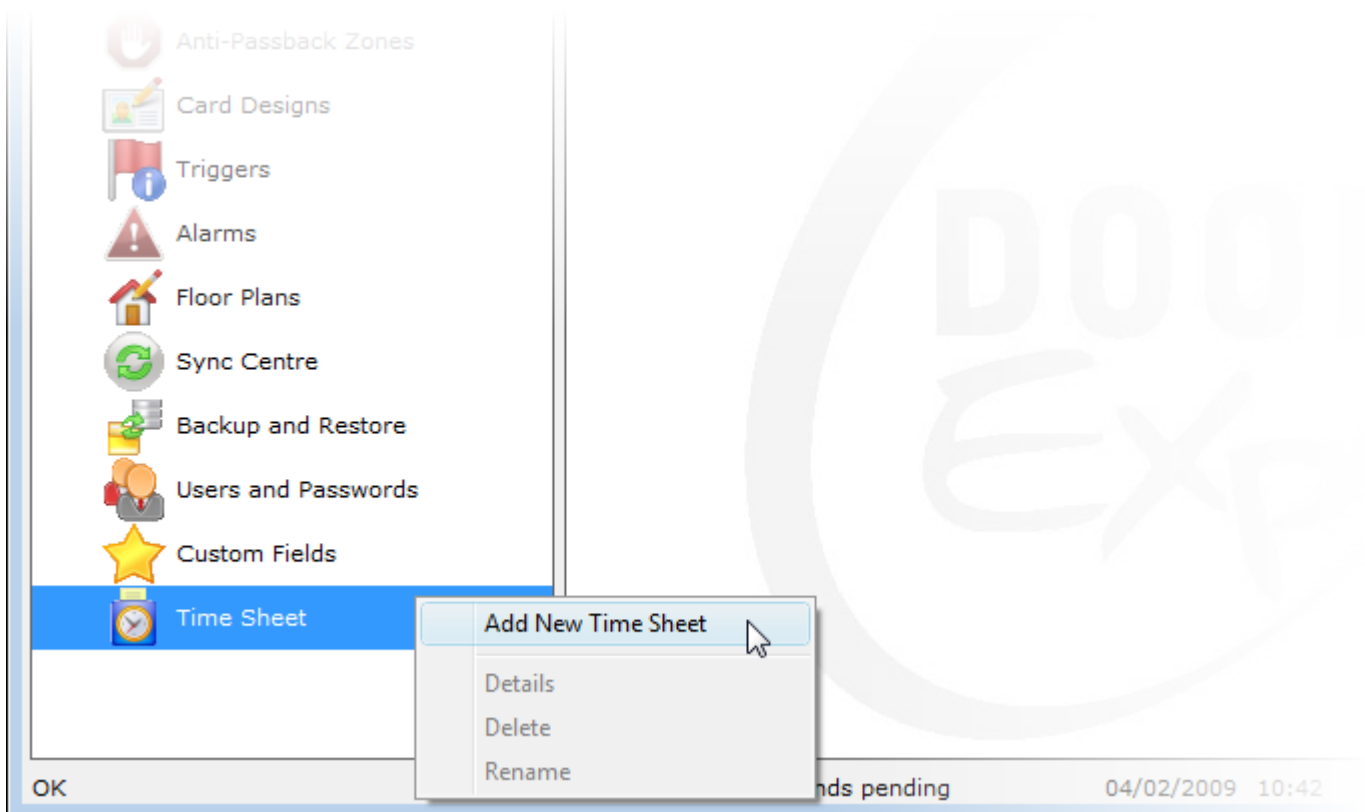
3   Enter a name for the time sheet. If required, select the required fields in the "Who" section. Select the date range for this report. Click **OK** to save.

4   View the results.

Using "Anti-Passback" to Encourage Correct System Usage

Like space zones, **Anti-Passback** zones are a group of doors, however a door can only be added to one zone. A door's behaviour within a space zone can be set to log cardholders in or out of that zone, or only allow access when in or out of the zone.

Anti Passback zones can be used to encourage cardholders to present their cards, rather than following another person through the door.

Creating an Anti-Passback Zone

1   Add a new Anti-Passback Zone from the Information Panel.
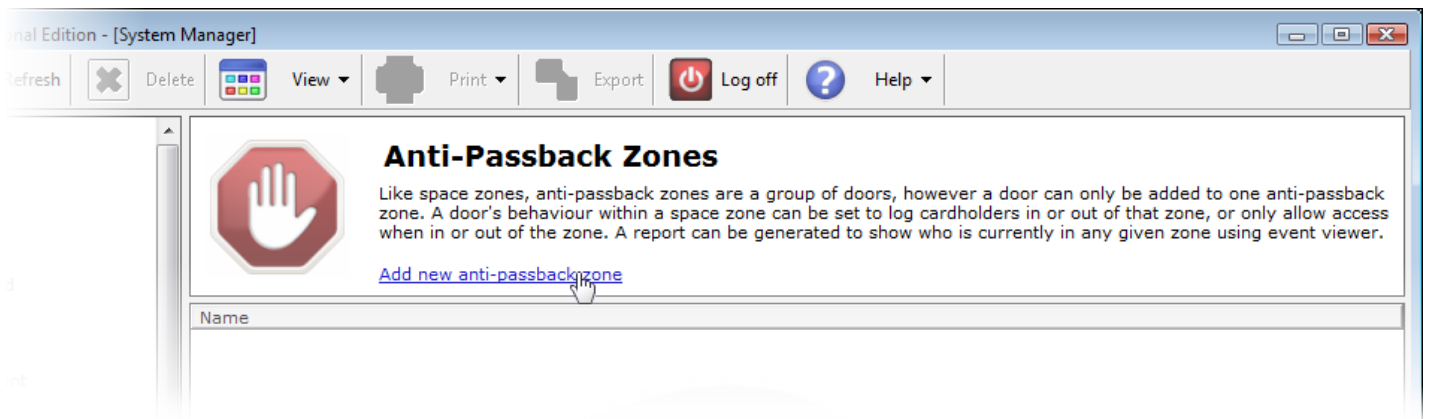
2   Enter a name for the zone. Select the **Mode**.
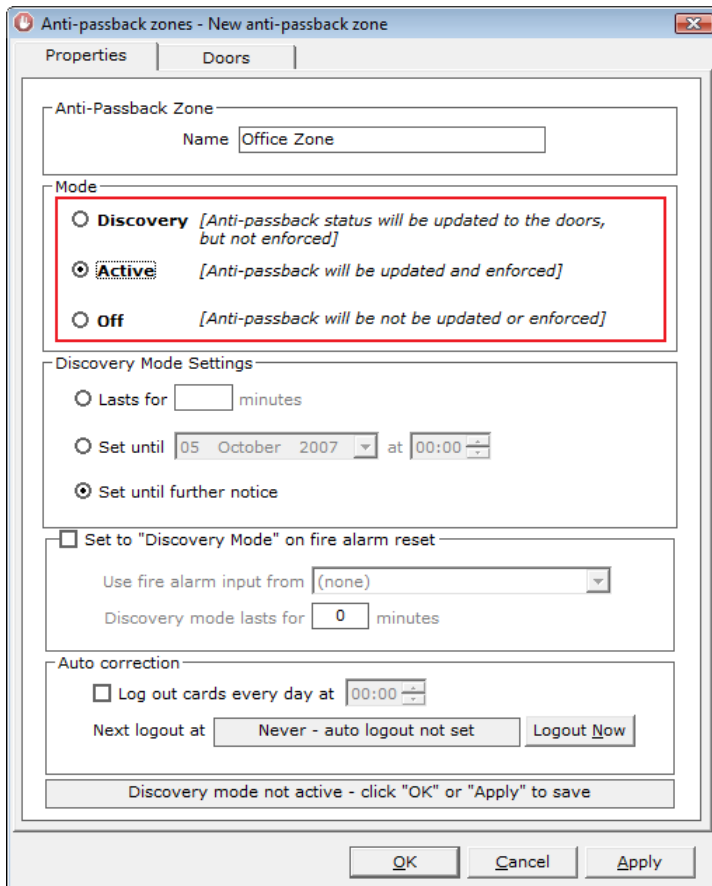
Discovery Mode will update the current status in the doors, but will not restrict cardholders entering and exiting.
This is useful when setting up a new zone or after a fire alarm.

Active will restrict cardholders from entering and exiting the zone when appropriate.

When **Off** selected, no updates will be sent to the doors.

3 Select the doors to be included in the zone.

4 Double-click a door to change the behaviour.

5   Review the doors. In the below example, the Main Entrance is a **border controller,** and the Office is an **internal door.** This means that in order for a cardholder to enter the Office, they must first have presented a valid card at the Main Entrance. Click **OK** to save.
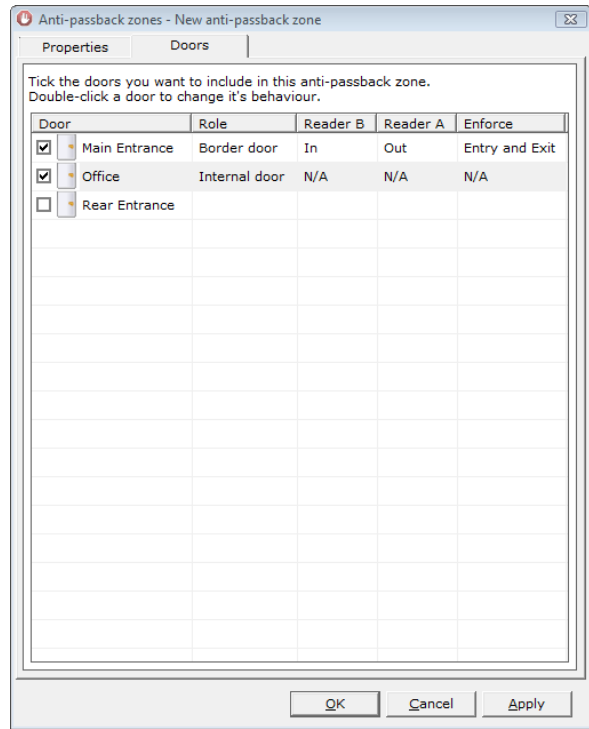
6   Open a Live Events report as described in <u>Viewing Current Activity</u>. Present a card to the **In Reader** of the **Border Controller** (in this example this is **Reader B** of the **Main Entrance**). A **Valid Card** is produced.
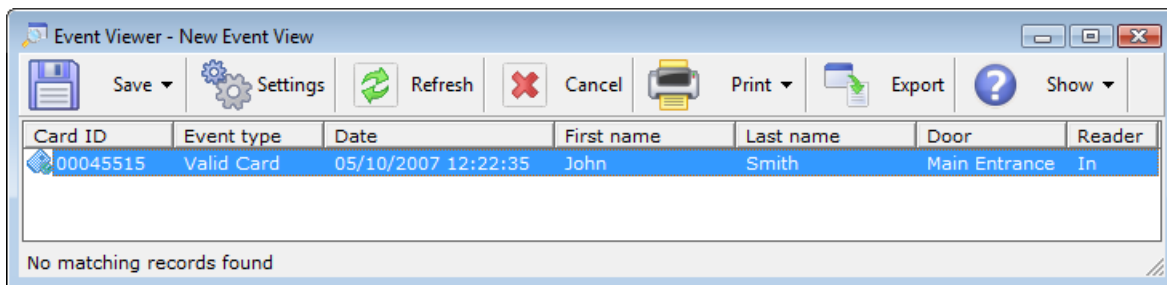
7   Present the card again. This time an **APB Fail** is produced because the cardholder has not left the zone.
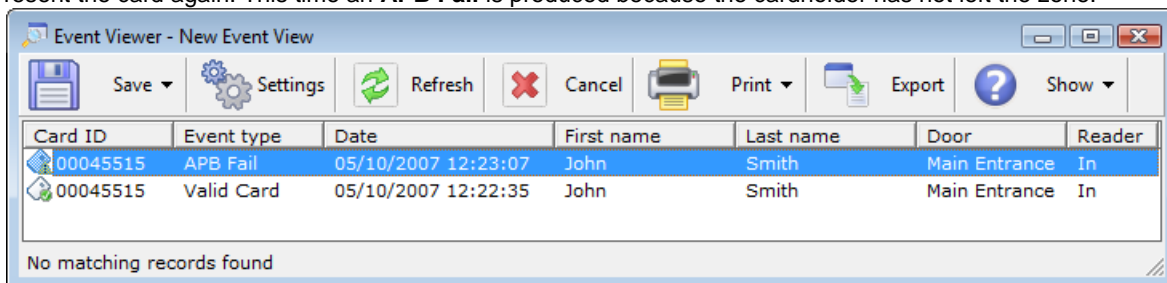
Logging Cardholders In and Out of a Zone

In the previous example, a cardholder was prevented from entering a door because of an **APB Fail**. There are three ways to correct this:

- Present the card at an **Out** reader on a **Border Controller.** In this example, that would be Reader A at the Main Entrance.

- Open the Anti-Passback Zone, and select **Logout Now** in the **Auto Correction** section. Note that this will also log all other cards out of the zone.
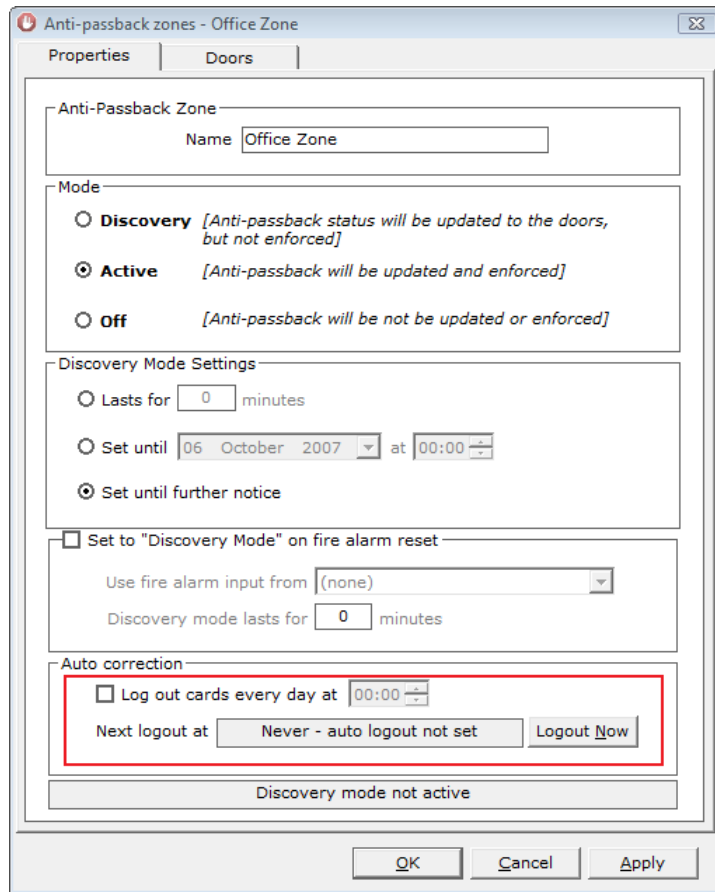
- Log out the card individually using card manager.

 Right-click the record in event viewer, and select **Card Details**

2 The card record will be shown. You may need to add **Current APB Zone** to the list of fields. This is detailed in Changing the Card Manager Display.

Card Manager - Existing Record

Add or Remove Fields ▾   [camera]   Cardholder Photo ▾   [printer]   Print Card ▾

Cardholder Details

Card ID   00045515   [...]
First name John
Last name   Smith
Enabled   ☑
Access level All Doors ▾ [...]
Dormant   ☐
Department   ▾ [...]
Current APB zone Office Zone ▾ [...]

Photo
[photo placeholder with question mark silhouette]

Last transaction: Main Entrance at 12:23:07 (APB Fail)   OK   Cancel   Apply

3 Change the **Current APB Zone** to **(none).** Click **OK.**

Card Manager - Existing Record

Add or Remove Fields ▾   [camera]   Cardholder Photo ▾   [printer]   Print Card ▾

Cardholder Details

Card ID   00045515   [...]
First name John
Last name   Smith
Enabled   ☑
Access level All Doors ▾ [...]
Dormant   ☐
Department   ▾ [...]
Current APB zone Office Zone ▾ [...]
                  (none)
                  Office Zone

Photo
[photo placeholder with question mark silhouette]

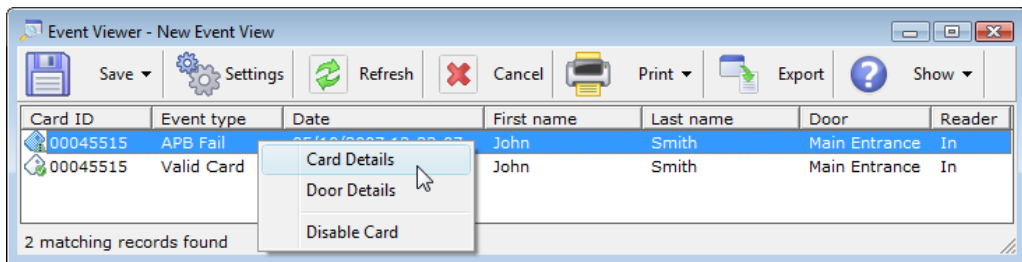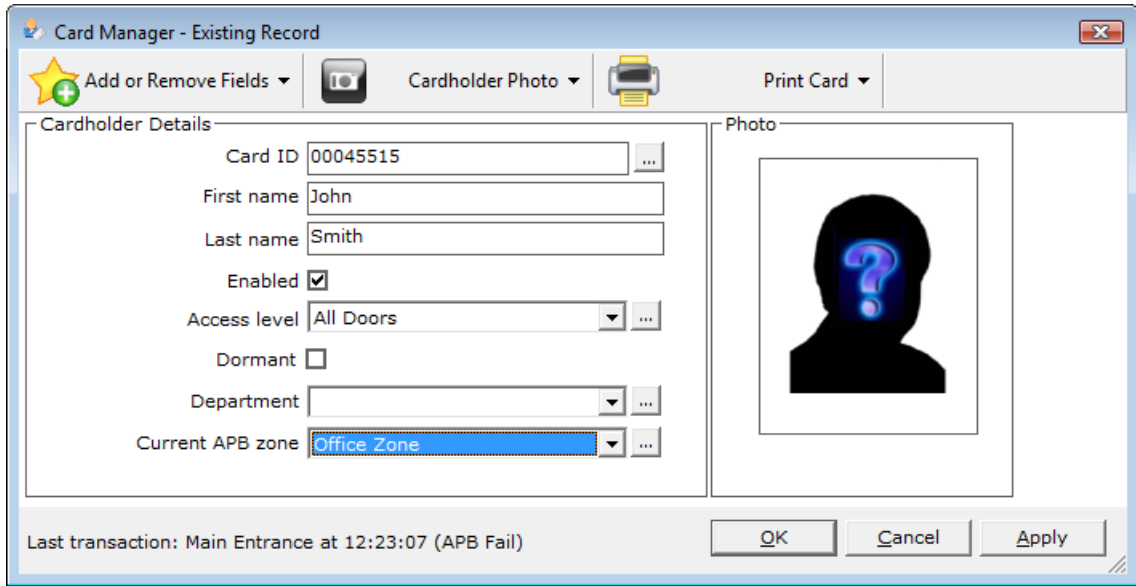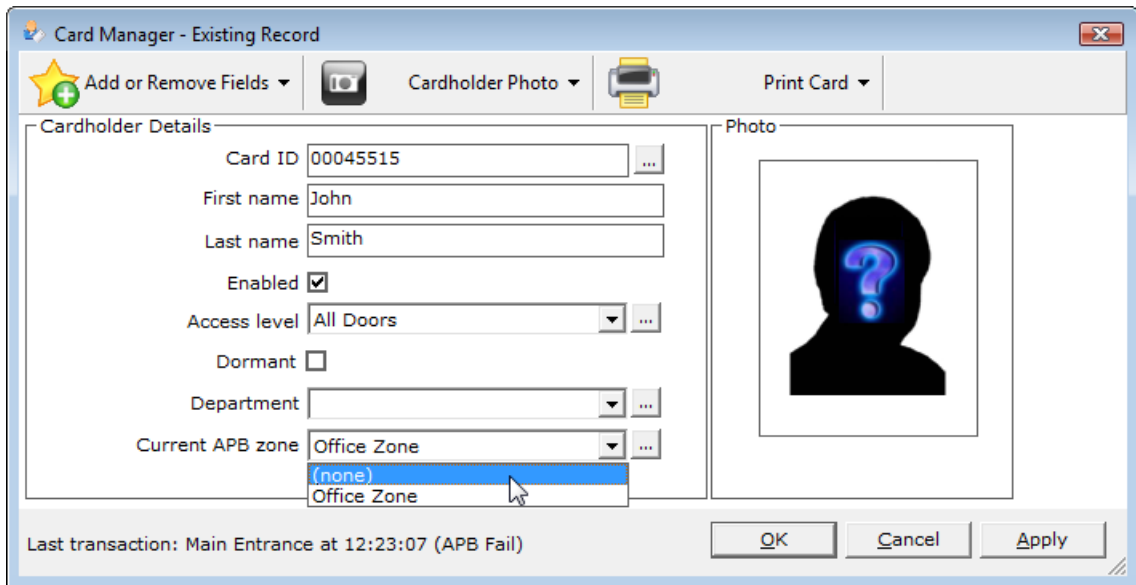Last transaction: Main Entrance at 12:23:07 (APB Fail)   OK   Cancel   Apply

4 Present the card again, and review the result in **Event Viewer.** Entry to the door has been allowed.

Event Viewer - New Event View

[disk] Save ▾ [gears] Settings [refresh] Refresh [X] Cancel [printer] Print ▾ [export] Export [?] Show ▾

Card ID	Event type	Date	First name	Last name	Door	Reader
00045515	Valid Card	05/10/2007 12:45:19	John	Smith	Main Entrance	In
00045515	APB Fail	05/10/2007 12:23:07	John	Smith	Main Entrance	In
00045515	Valid Card	05/10/2007 12:22:35	John	Smith	Main Entrance	In

2 matching records found

Registering the Doors Fortessa Software

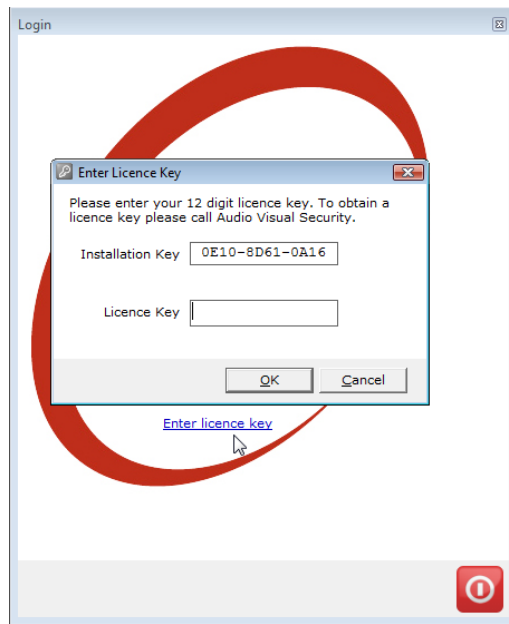After installation, the Doors Fortessa software will continue to run for 30 days. In order to continue using it, you must enter a **Licence Key.**
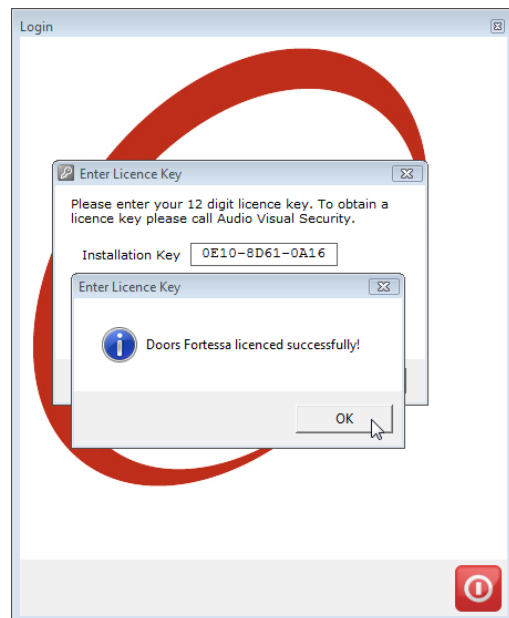
Entering a Licence Key

Select **Enter licence key** from the **Login Screen**.

Enter the **Licence Key,** and click **OK.**

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Safety Notes

- Please read this manual carefully before attempting to install, program or operate the Fortessa access control equipment.
- This equipment must be installed in line with all relevant regulations and standards.
- Make sure that wiring is rated according to fuses and current limits of relevant power supplies.
- All connections to this unit must be SELV level. (Safety Extra Low Voltage, BS EN 60950 1992)
- Every effort is made to ensure that this manual is complete and free from errors. However we reserve the right to make changes to these products and this manual without notice.
- No liability is accepted for loss damage or injury as a consequence of using these products or instructions.