## Secure Access v2.4 User Guides

**Basic Usage of Lockt SecureAccess** 



#### Lockt SecureAccess

- Logging In
- Navigation
- Basic Configuration
  - Data Overview
  - Doors
  - Schedules
  - Access levels
- Users
- Monitor
  - Events
  - Door Status
  - Reports
- Additional Help

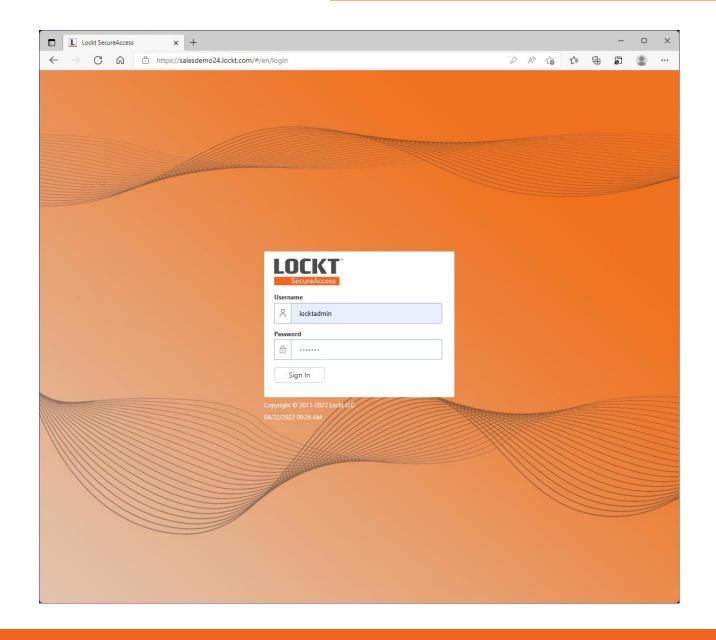


# Logging In



## Logging In

- Open up your web browser and navigate to your assigned URL
- (i.e. https://mysite.lockt.com)
- When prompted, enter your assigned username and password
- Click Sign In





## **Data Overview**



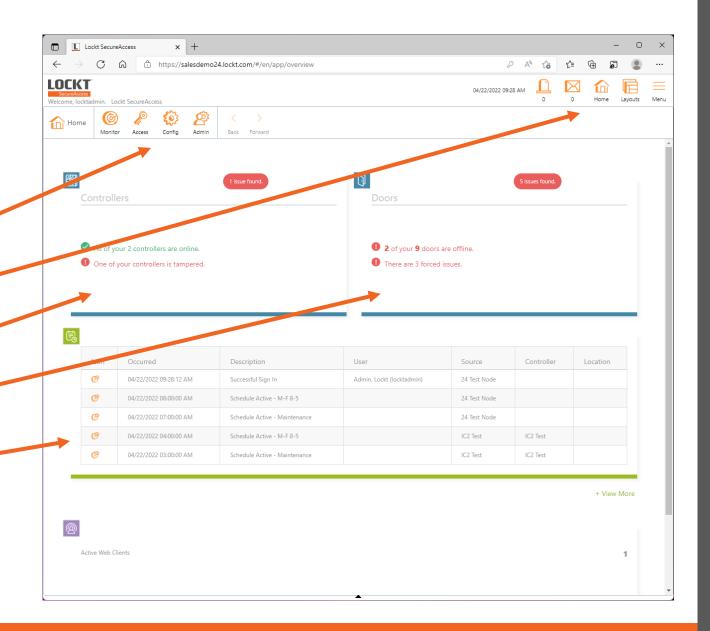
In order to enable full access control using Lockt SecureAccess, several pieces of data need to be configured

- Doors The individual door openings (What)
- Schedules The days and times that doors will be allowed access (When)
- Access Levels combines Doors and Schedules into a role that is assigned to a user (What + When)
- Users individual users that are allowed or disallowed access to a Door through assigned Access Levels (Who)





- Once logged in, you will see the home page consisting of:
- The Navigation Menu
- The Main Menu
- Controller Summary
- Door Summary
- Recent Events





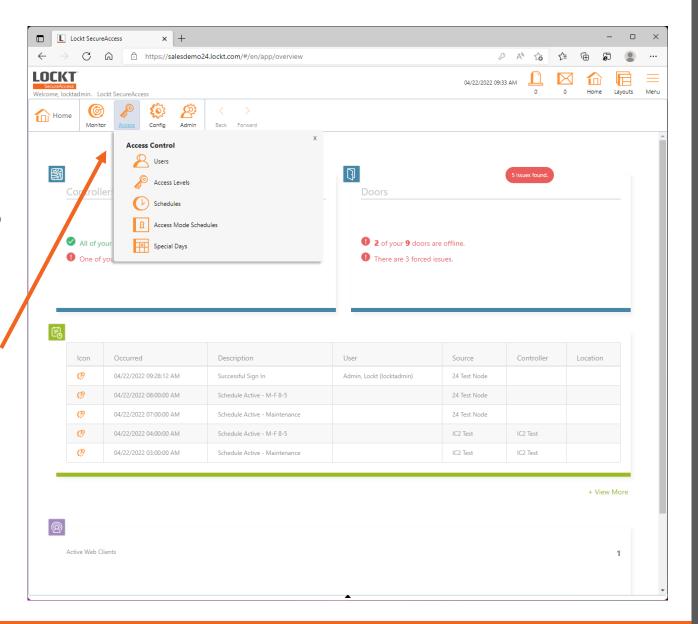
#### The Navigation Menu

This menu provides you with all the tools needed to manage the Lockt SecureAccess System, Users, and Access Data

Clicking on any of the menu Items will produce an additional dropdown menu

#### Menu Options

- Monitor View events and Reports
- Access Manage Users, Access Levels, Schedules
- Config Manage Controllers and Doors
- Admin Manage System-wide Settings



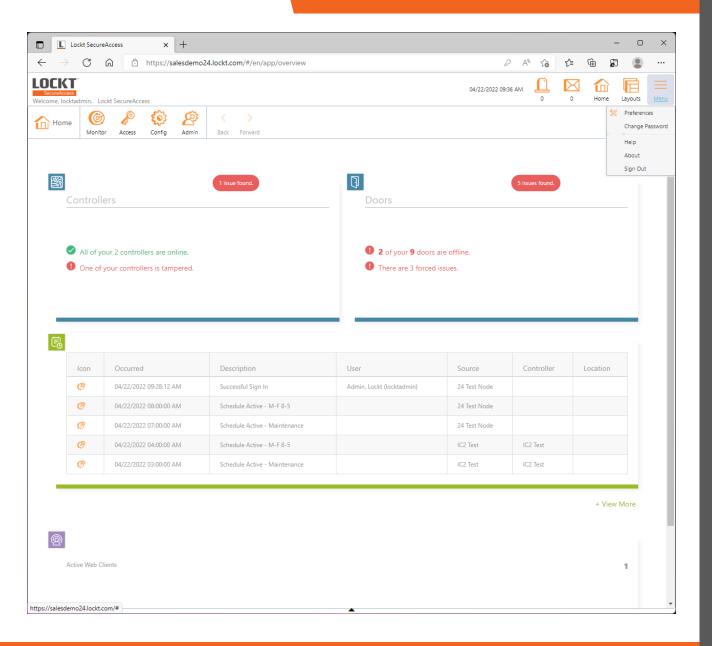


#### The Main Menu

This menu provides options for viewing alerts and messages (if enabled), changing layouts, and the Menu button.

#### The Menu button provides for:

- Setting Preferences
- Changing Password
- Accessing Help
- Signing Out

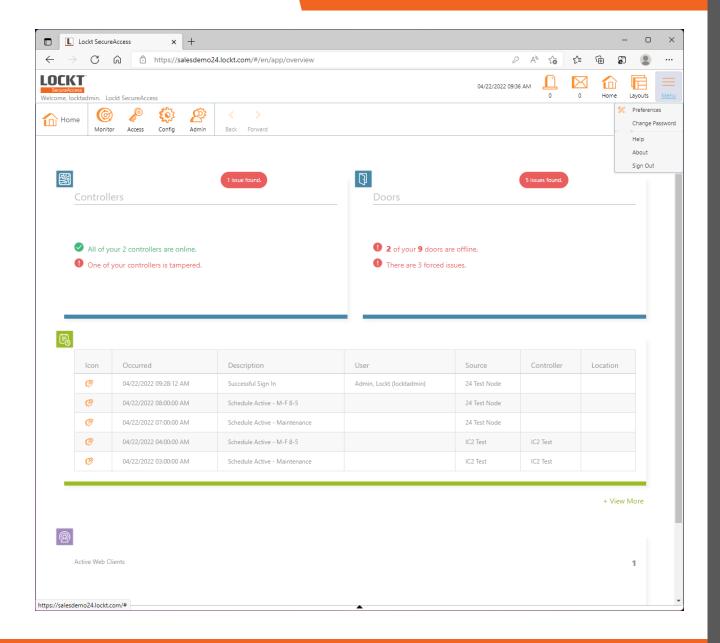




#### **Dashboard Panels**

The remaining Home Screen is made of panels for displaying common information

- Controllers displays the current status of any controllers in the system
- Doors Displays the current status and issues related to any Doors in the system
- **Events** displays the most recent events to occur in the system





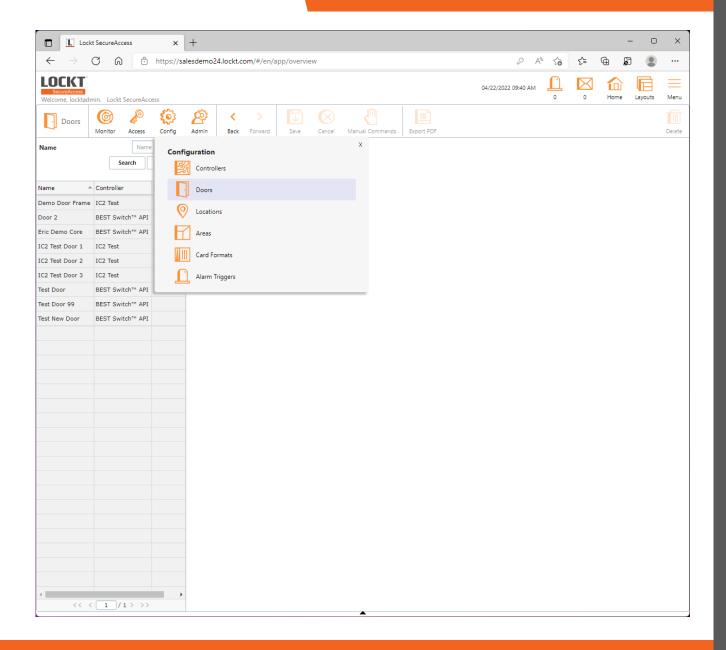
# Basic Configuration -Doors



To access the Doors Screen, Click Config > Doors

The Doors Screen is used to manage **Doors that have** already been created.

See later slides for instructions on creating a Door





If Doors have been previously configured, a list of doors will appear on the left of the screen.

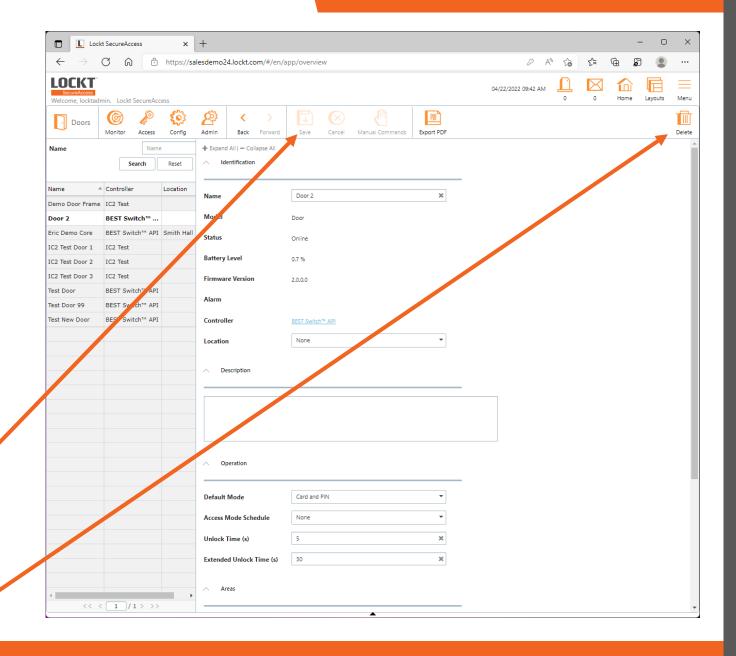
Click on any Door in the list of doors to display its details.

Lockt Secure Access is capable of several types of doors.

The specific details and configuration for individual doors will be displayed on this screen.

To change any setting on the door, select any of the editable fields, make your change, and click the **Save** button at the top of the screen.

To delete a door, click the **Delete** button in the top right of the screen.

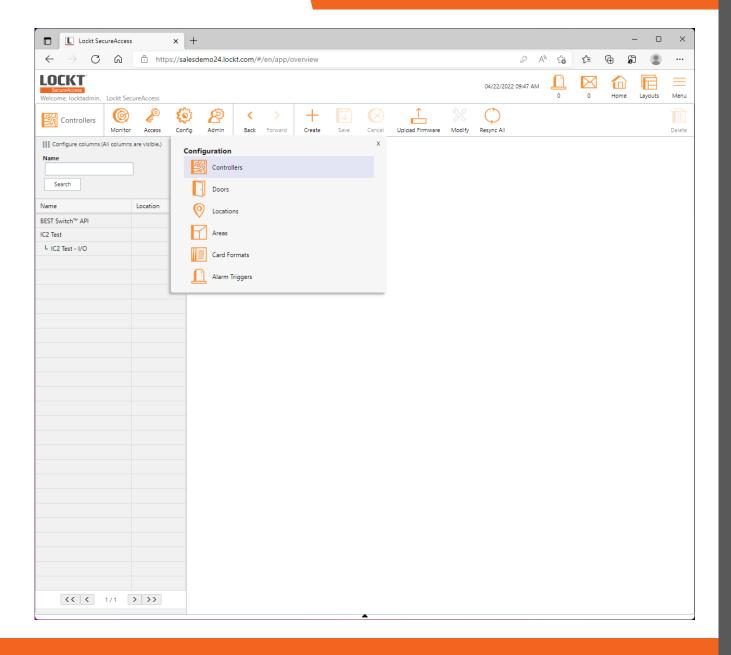




To Create a Door, click **Config > Controllers** 

Doors for hard wired controllers will automatically be created by the controller board.

You will only be able to create Switch Tech Cores manually

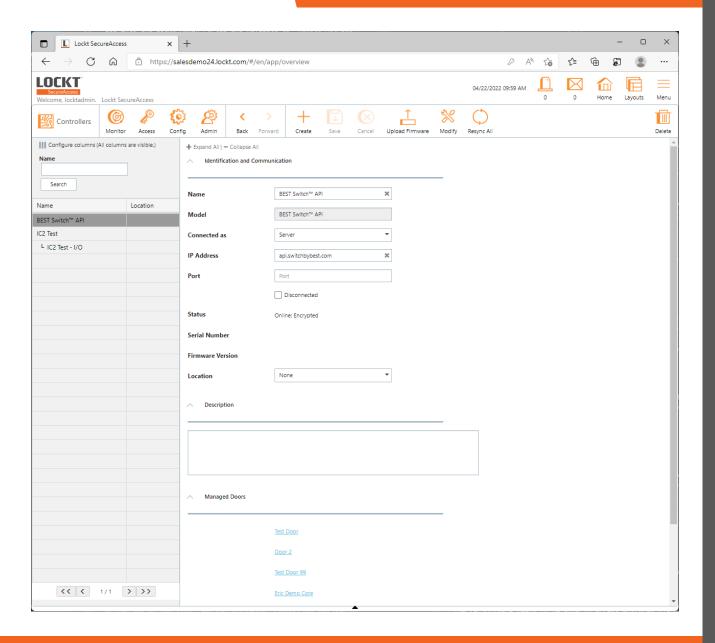




On the Controllers Scree, click on **Best Switch<sup>TM</sup> API** 

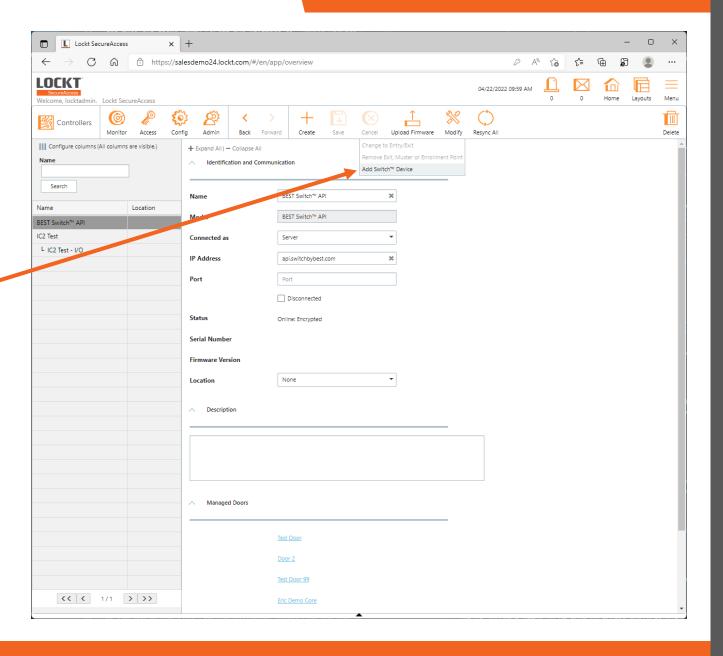
This will bring up a page that shows configuration options fort this controller.

Generally speaking, these settings should not be changed.





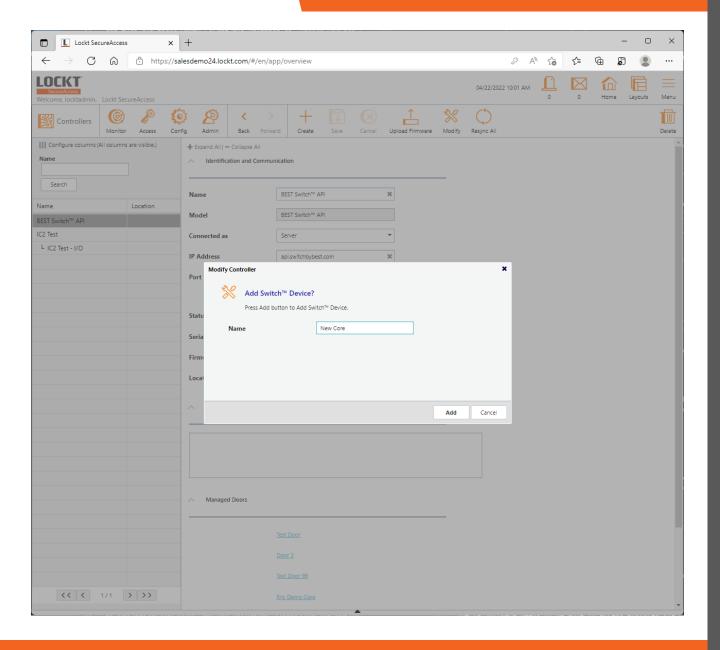
On the **Best Switch<sup>TM</sup> API** screen, click the **Modify** button, then click **Add Switch<sup>TM</sup> Device** 





In the screen that appears, enter a name for the new Door

Then, click Add

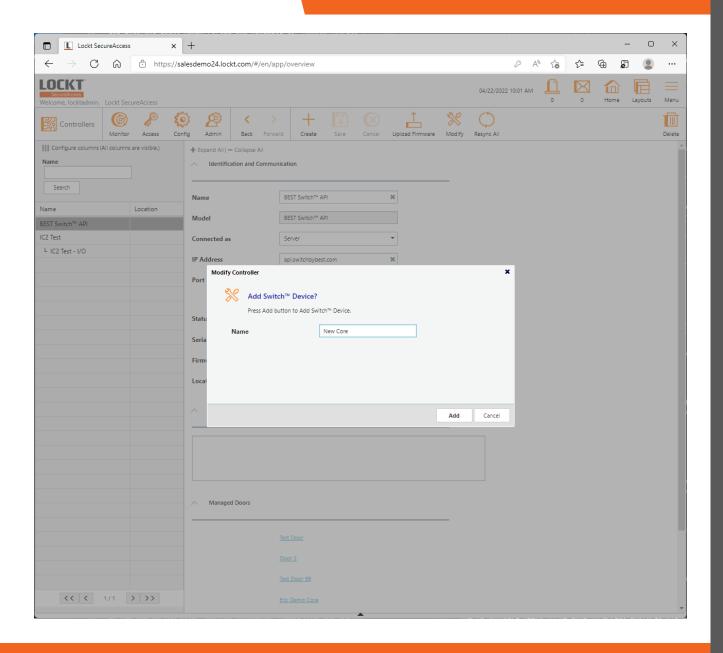




A confirmation screen will appear.

Click Ok

Your new door has been added to Lockt SecureAccess



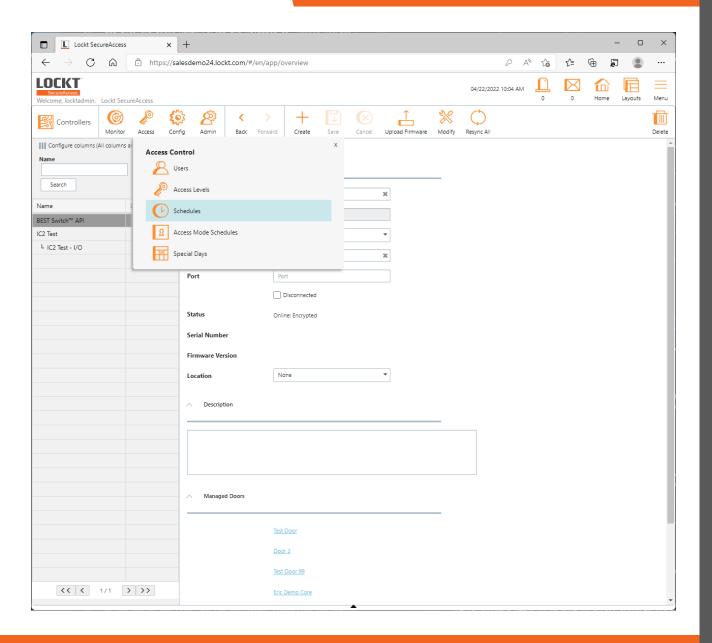


# Basic Configuration -Schedules



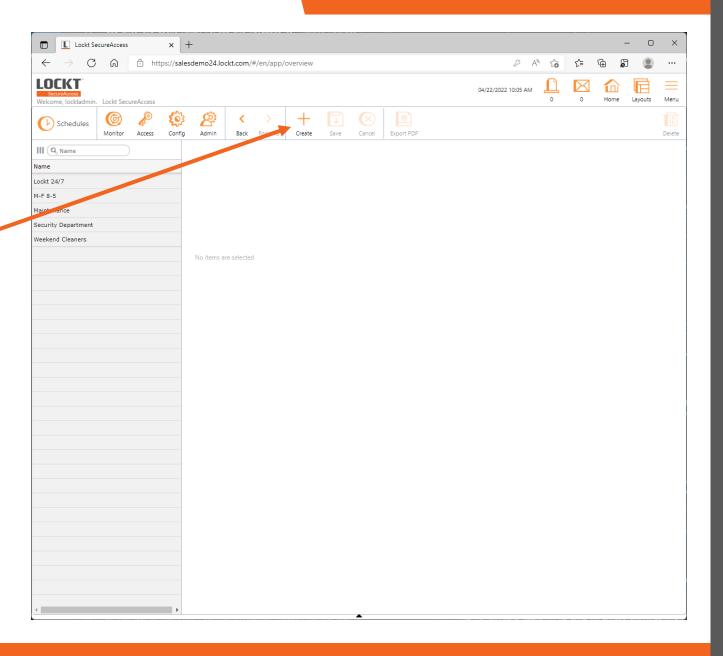
To access the Schedules screen, Click Access > Schedules

The **Schedules** screen is used to manage create and edit Schedules





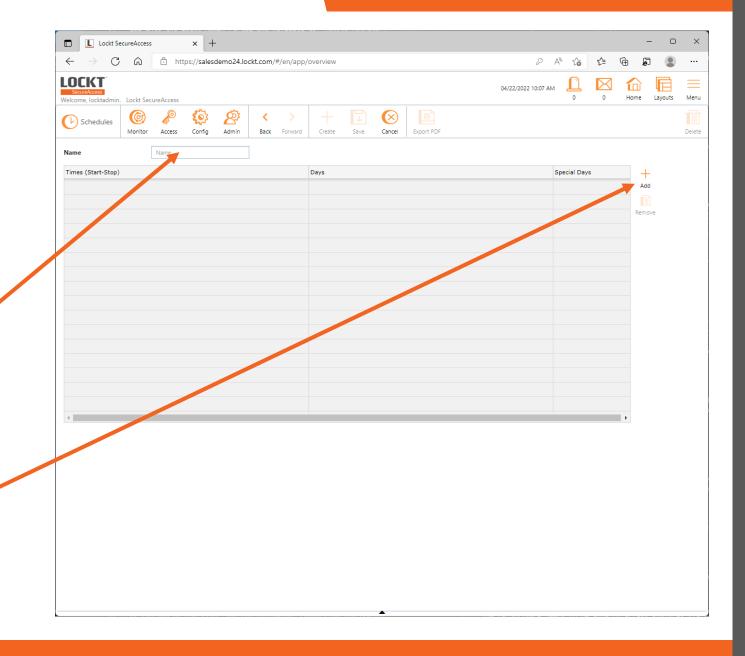
To create a new Schedule, click the **Create** button in the top menu





Enter a Name for the Schedule in the **Name** field

Click the **+ Add** button on the right side of the screen to add an actual Schedule



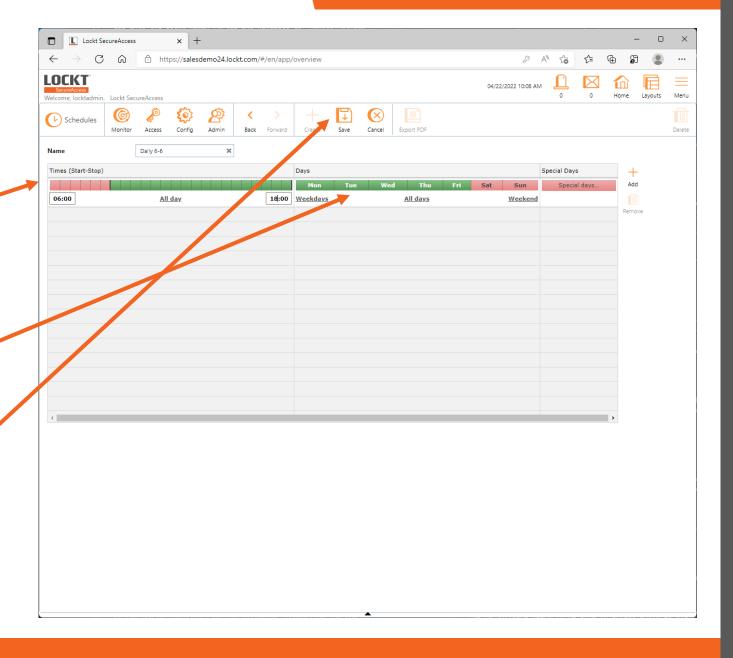


In the **Times (Start-Stop)** pane, you can enter a start time and a stop time using 24-hour time

You can also select which days to apply by clicking a day name in the **Days** pane. Days highlighted in green will be active on the Schedule. Days in red will not be active

When done, click the Save button

Your Schedule has been added to Lockt SecureAccess

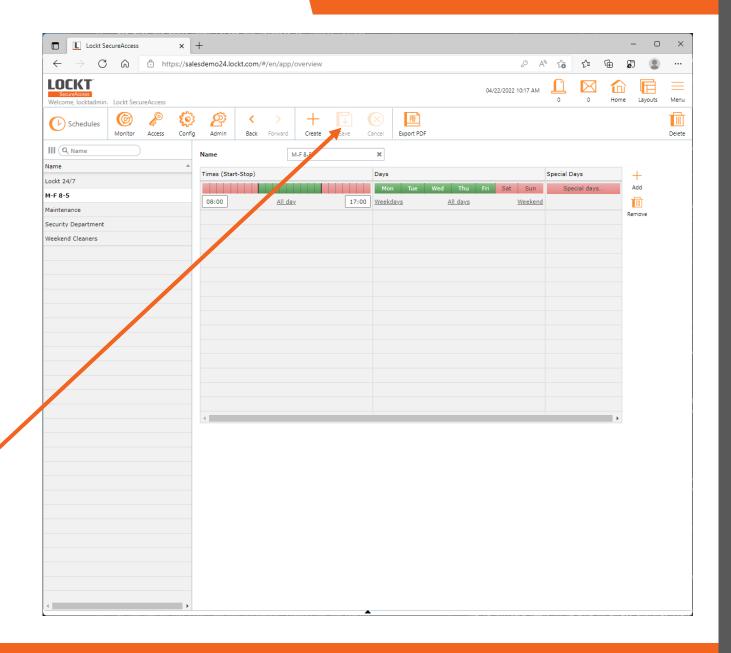




To edit a Schedule, click on a Schedule name in the left pane

The Schedule details will appear in the middle pane

After changes, click the **Save** button



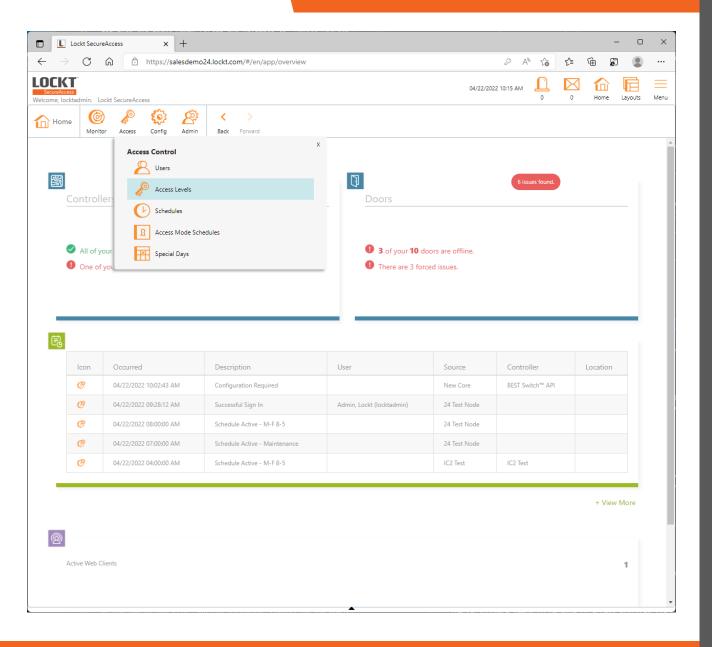


# Basic Configuration – Access Levels



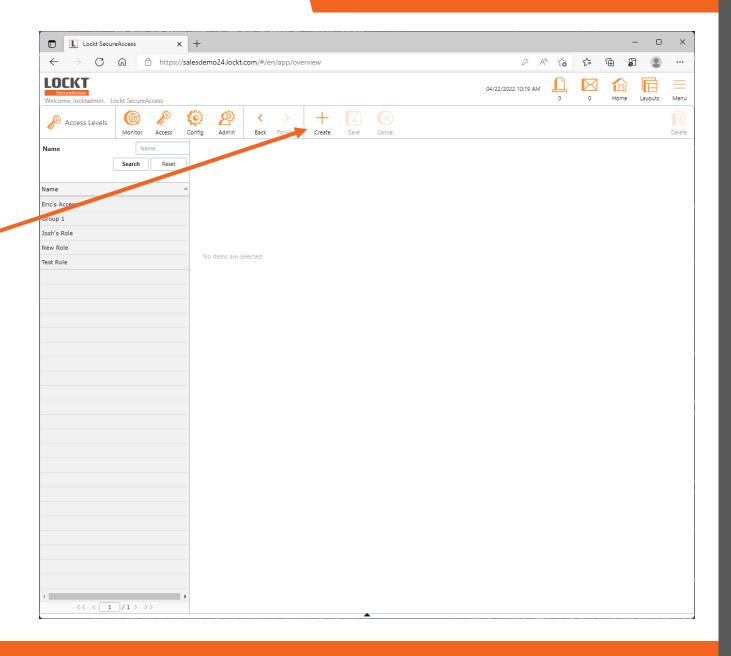
To access the Schedules screen, Click Access > Access Levels

The Access Levels screen is used to manage create and edit Access Levels





To create a new Access Level, click the **Create** button in the top menu





Enter a Name for the Access Level in the Name field

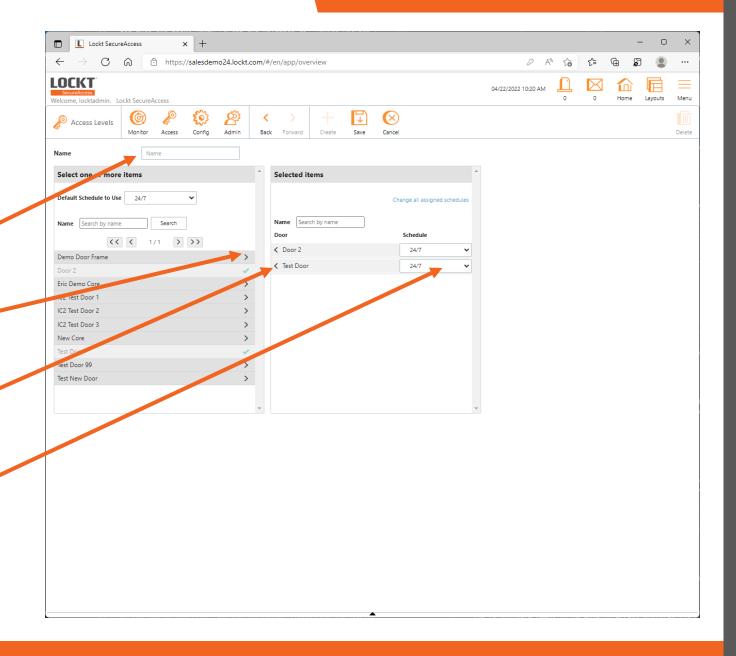
To Add Doors to the Access Level, click the > icon next to the door name to move it to the **Selected Items pane** 

To remove a Door, click the < icon to move it back to the **Select one or more items pane** 

To change the Schedule that applies to an individual door, select the Schedule from the **Schedule** dropdown in the Selected Items pane

When done, click Save

Your Access level has been added to Lockt SecureAccess

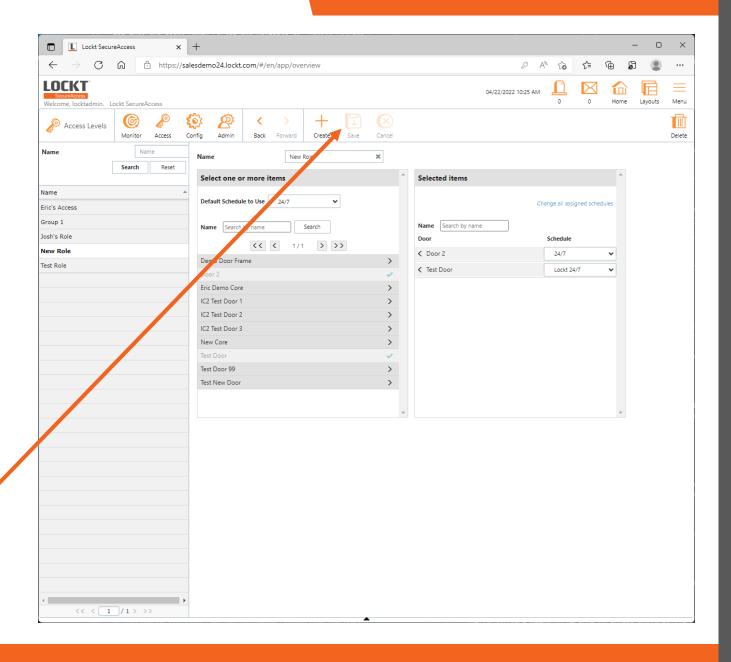




To edit an Access Level, click on an Access Level name in the left pane

The Access Level details will appear in the middle pane

After changes, click the **Save** button

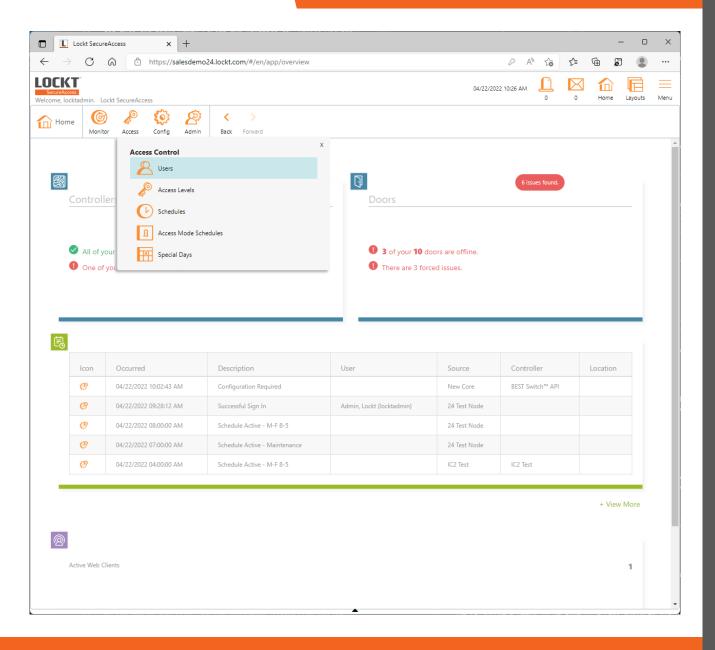






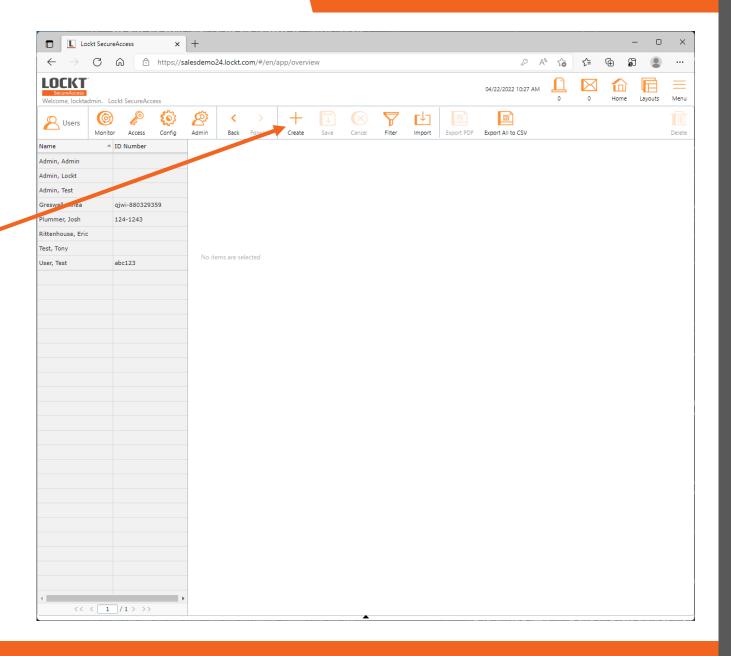
To access the Users screen, Click Access > Users

The **Users** screen is used to manage create and edit Users





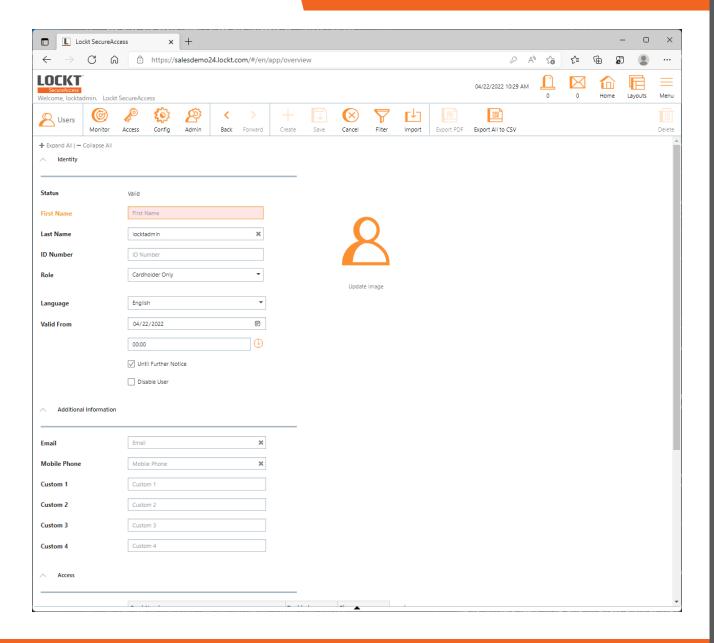
To create a new Access Level, click the **Create** button in the top menu





## The User Screen has several different sections

- Identity
- Additional Information
- Access





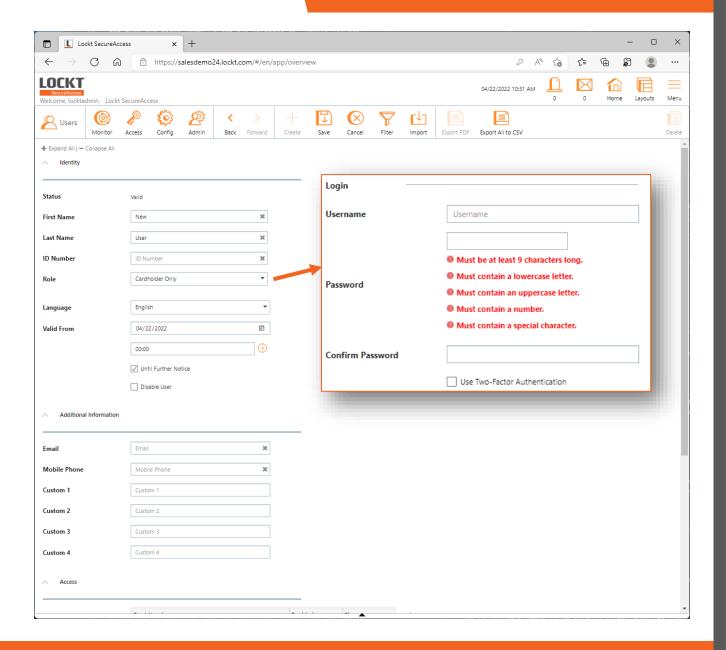
In the Identity section, enter the user's **First Name** and **Last Name** 

Choose the User's Role

If the User will require access to the Lockt SecureAccess software, change the role to **System Administration** or any of the available administration roles.

Changing the role field to a system administration role will display username and password fields which will be used to grant access to Lockt SecureAccess

If the User will only require cardholder access, leave the Role as Cardholder Only. This setting does not grant access to the Lockt SecureAccess software, but still provides the user the ability to access Doors



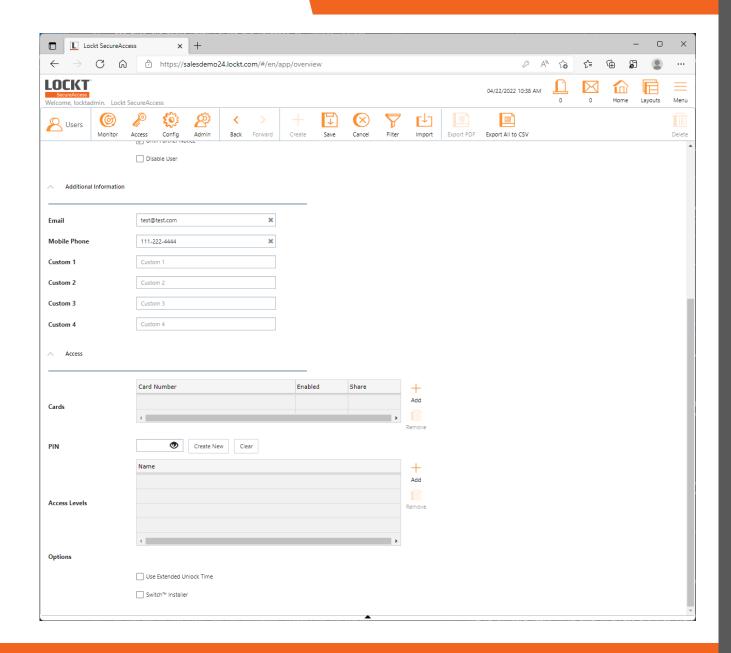


Scroll down to access the **Additional Information** area

In this area, enter **Email** or **Mobile Phone** details if needed

Note, Lockt SecureAccess provides the ability to notify end-users of their mobile credentials if an **Email** or **Mobile Phone** number is provided

If both a **Mobile Phone** and **Email** are provided, Lockt SecureAccess will prefer to email the end user





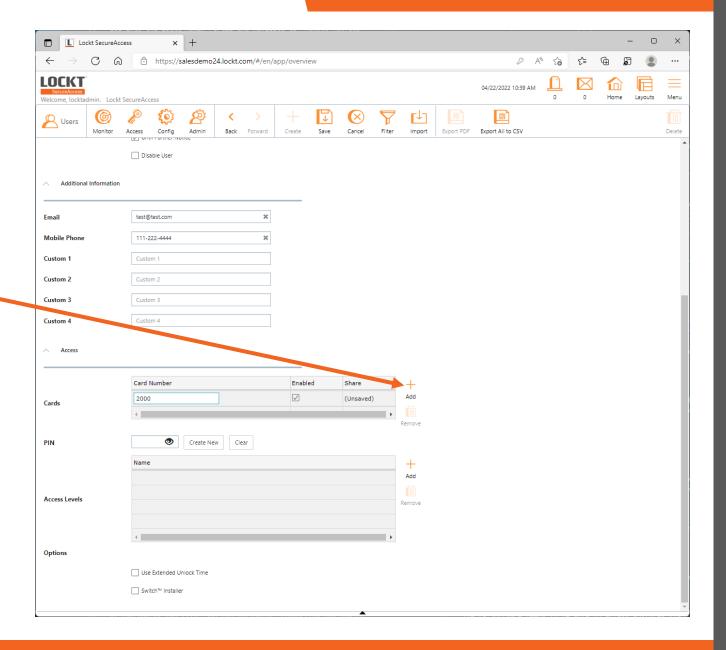
Scroll down to access the **Access > Cards** area

To assign a Card to a User, click the **+ Add** button to the right of the Cards area

A Card Number field will appear

Enter the **Card Number** for this user. Card Numbers are generally sequential numeric values

Ensure the **Enabled** checkbox remains checked



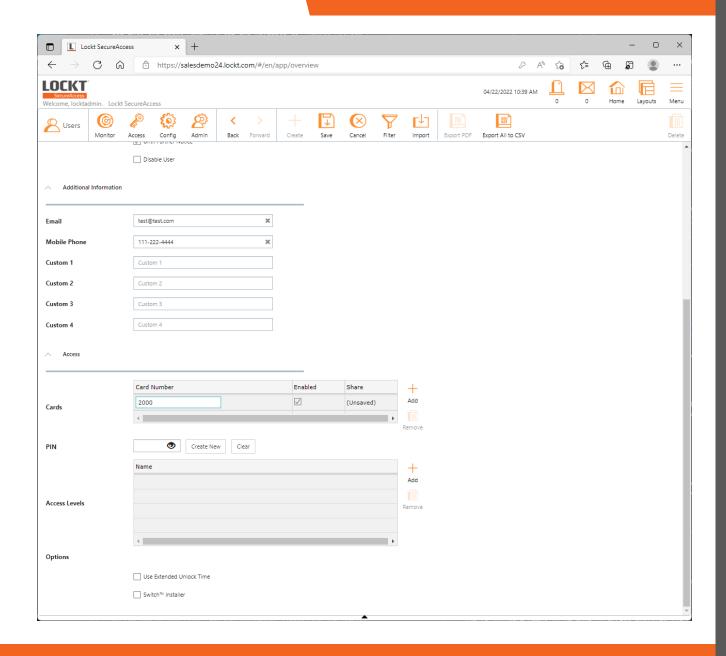


Scroll down to access the Access > PIN area

If you require PINs along with Credentials, enter a **PIN** for your user

Please note, that any user that is a Switch ™ Installer must use a **PIN** if they want to factory reset a core

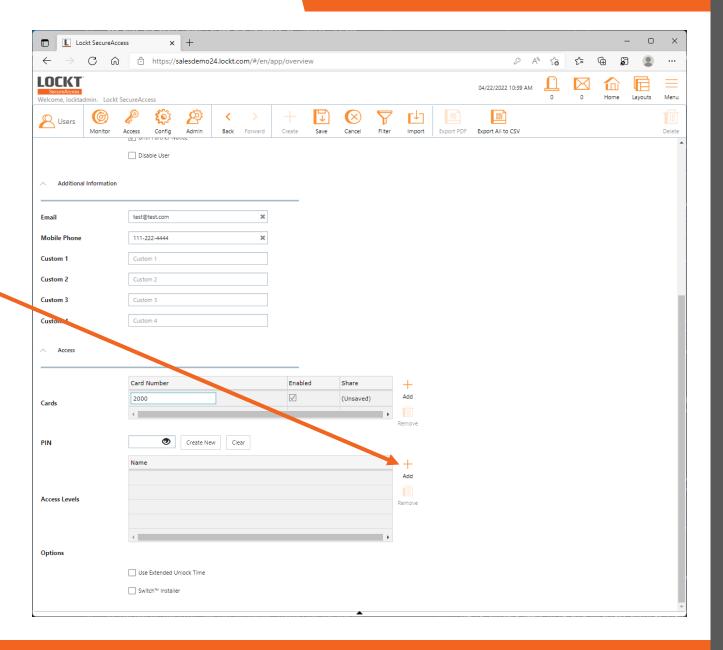
As a rule of thumb, assign a **PIN** to all Switch™ Installer Users





Scroll down to access the Access > Access Levels area

To assign an **Access Level** to the User, click the **+ Add** button to the right of the Access Levels area

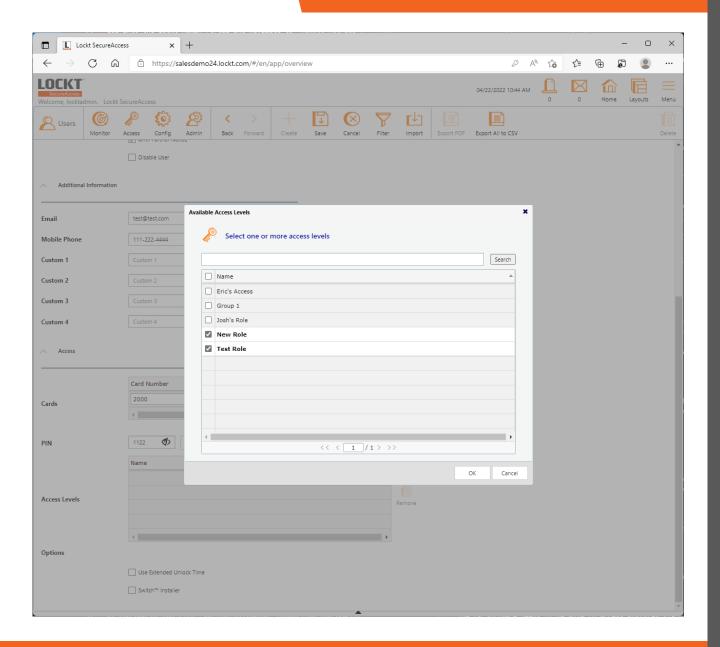




The **Available Access Levels** screen will appear

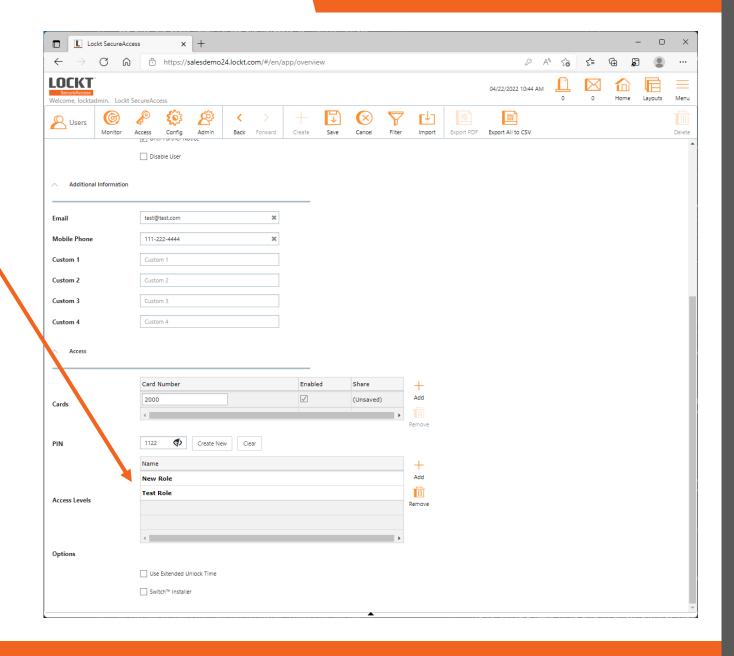
Select the Access Levels you wish to assign to the User by checking the checkboxes next to their Name

When done, click **OK** 





The selected Access Levels will appear in the Access Levels Area



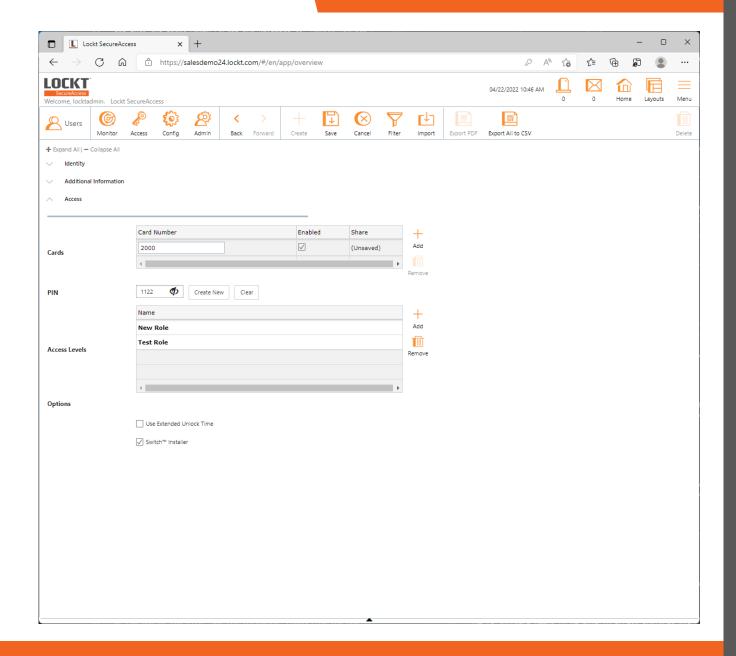


Scroll down to the **Options** area

If this users requires Extended Unlock Time, check the **Use Extended Unlock Time** box

If the user will be tasked with installing and/or programming Switch Cores, check the **Switch<sup>TM</sup> Installer** checkbox

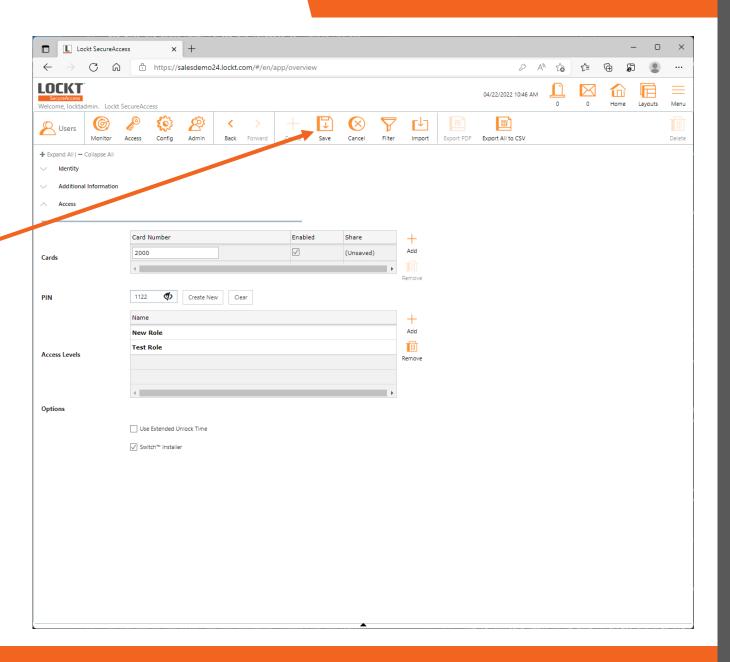
The **Switch™ Installer** checkbox enables the administrative functions within the Best Switch™ App





Now that you have entered all necessary user data, click the **Save** button at the top of the screen

Your user has now been added to Lockt SecureAccess

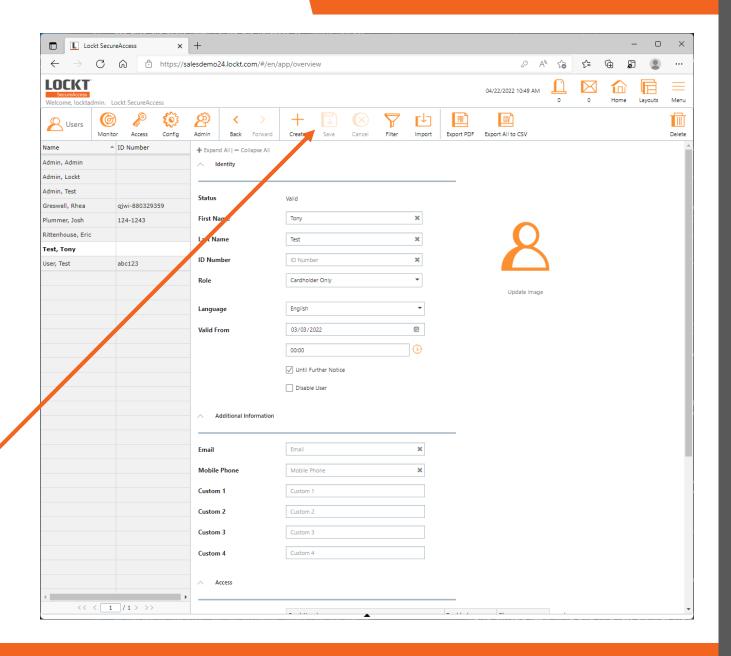




To edit a User, click on a Name in the left pane

The User details will appear in the middle pane

After changes, click the **Save** button





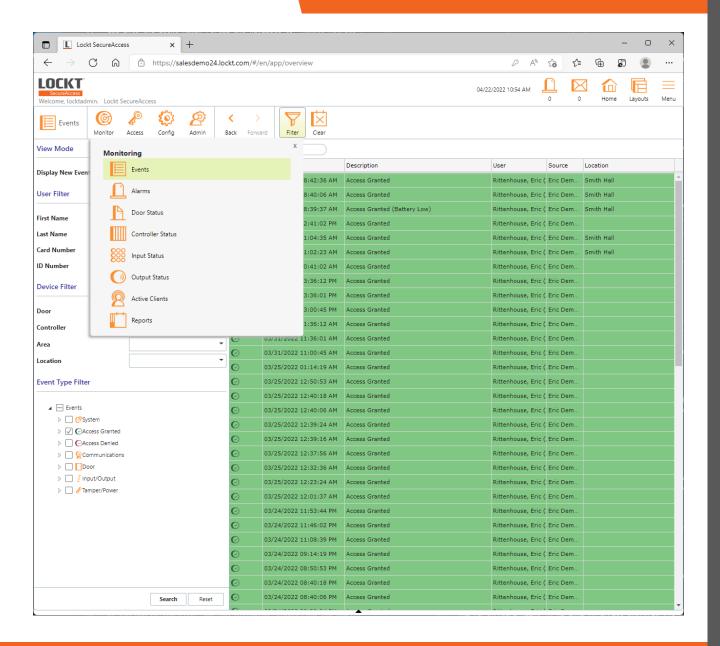
## Monitor - Events



### **Events**

To access the Events screen, Click **Monitor > Events** 

The Events screen is used to display and filter all system events





#### **Events**

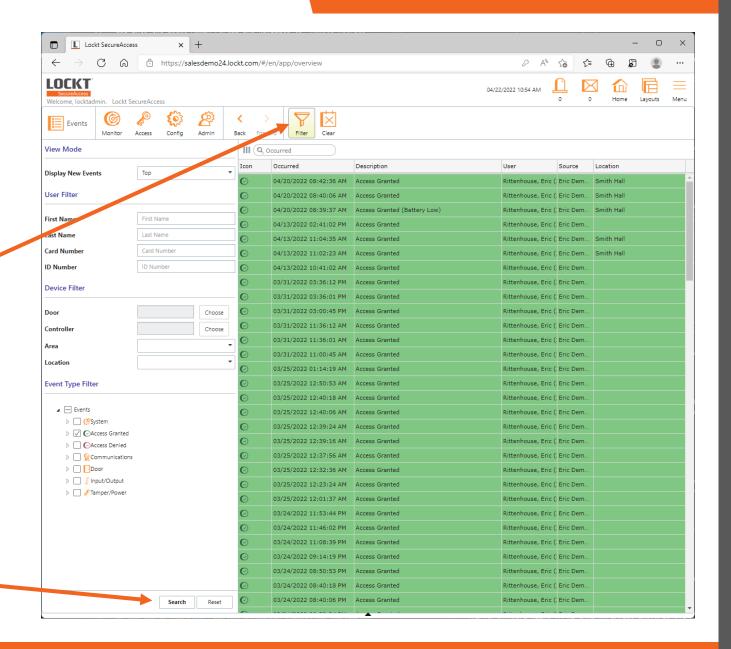
The Events screen displays all system related events

Filters are available by clicking the **Filter** button in the top menu

You can filter the list by ay of the available criteria including:

- Users
- Devices
- Event Types

To apply a filter, choose your filter options, then click the **Search** button at the bottom left.

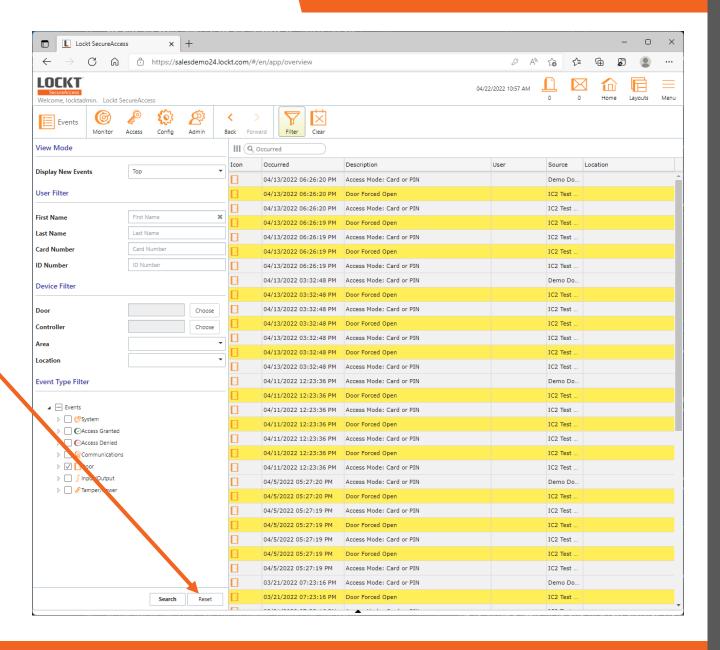




#### **Events**

Applying filters will change the Events that are display

To reset the filters, click the **Reset** button



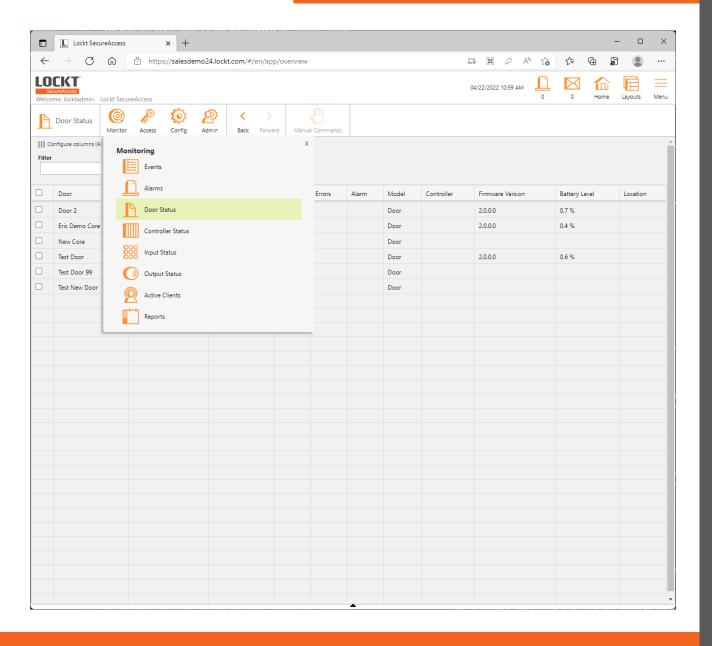


## Monitor - Events



## **Door Status**

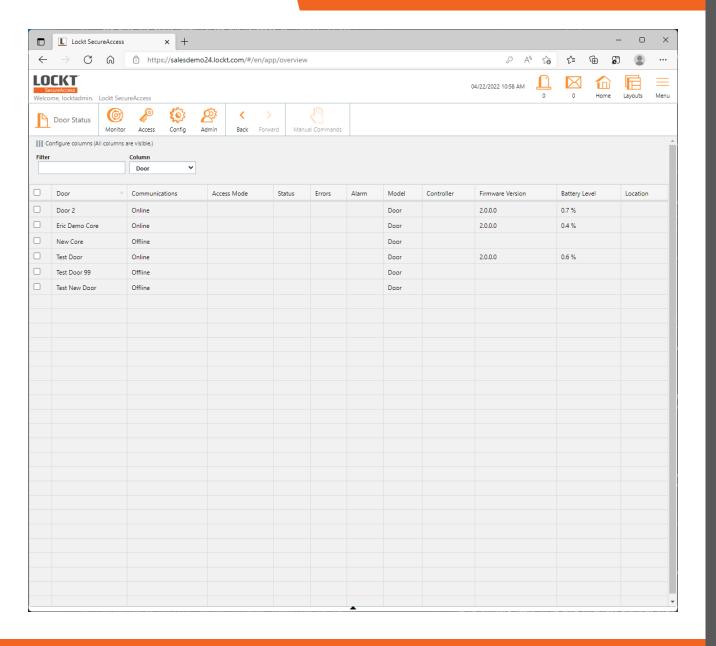
To access the Door Status screen, Click Monitor > Door Status





### **Door Status**

The Door Status screen is used to display an overview of all doors in the system and their current statuses

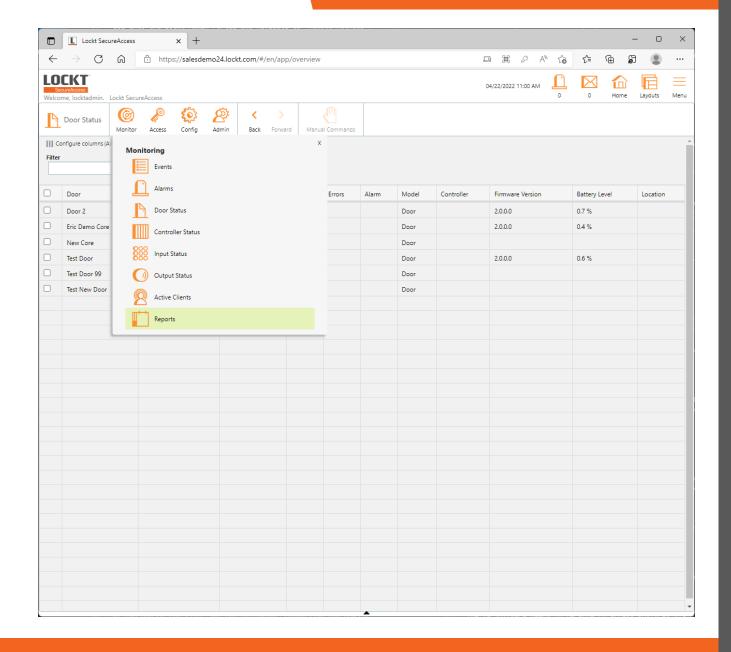




# Monitor - Reports



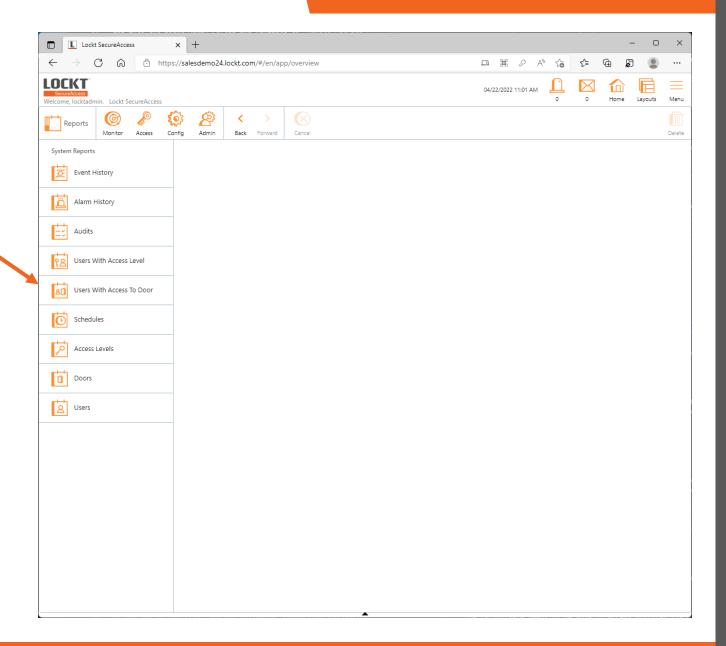
To access the Reports screen, Click Monitor > Reports





A list of available **Reports** will, appear in the left pane

To execute a report, click on one of the available reports

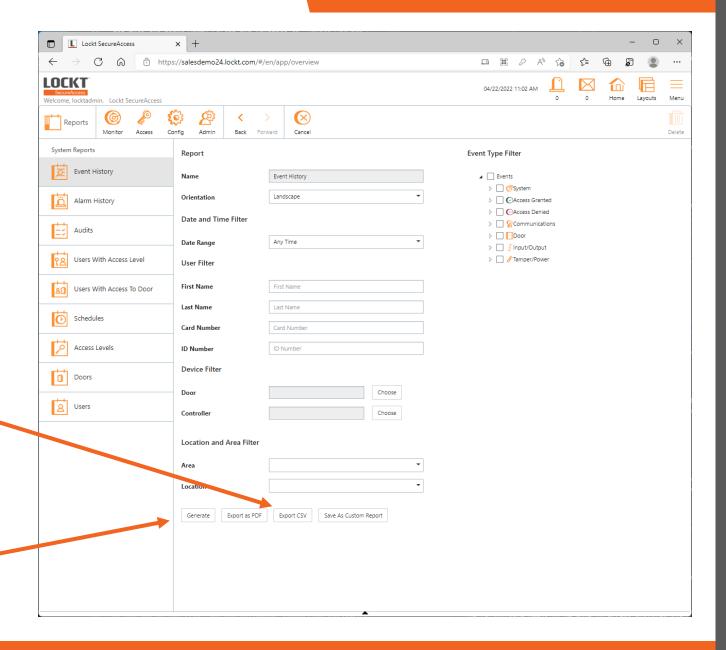




Each report will have different options for filtering, saving, and exporting

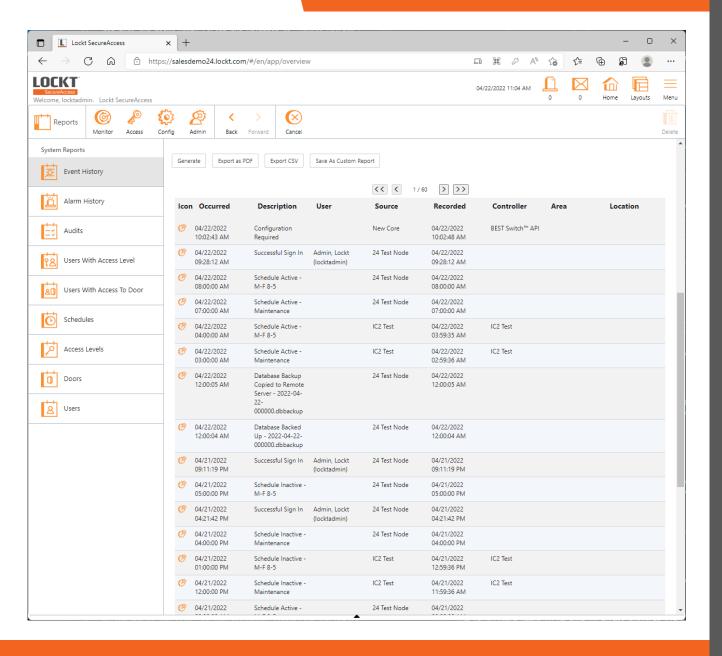
For those that support CSV export, click the **Export CSV** button to get an Excel file version of the report

To run the report on screen, click the **Generate** button





After clicking the **Generate** button, the report details will appear



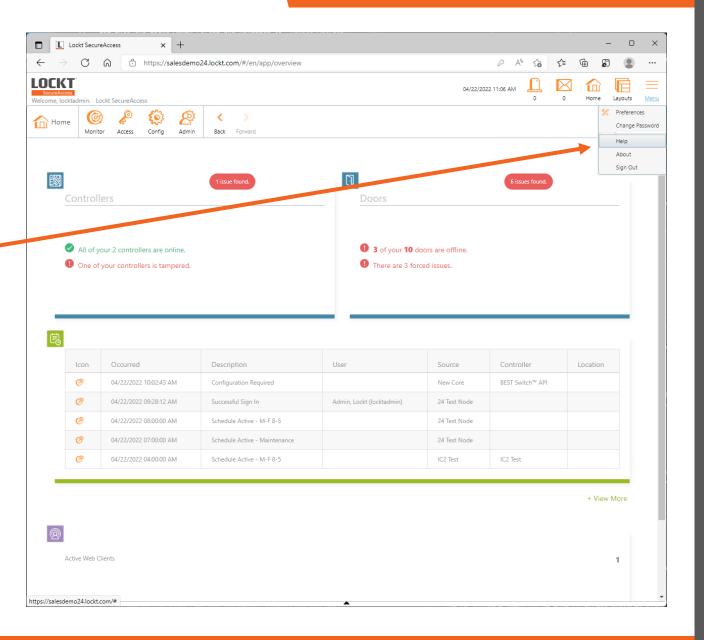


# Additional Help



## Additional Help

For Additional Help, click the **Menu** button in the upper right and select **Help** 





## Additional Help

The User Guide will appear with further details and help topics available at any time

