

# Help File v4.0

For Housing Central up to **ver. 1.14**

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**Technical Support**

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## Release Notes

### Version 1.14.x

#### Bug Fixes

- Rows of data do not display correctly when using table navigation buttons.
- Gateways should not be allocated controllers from different blocks.
- Keys were not updated correctly when a Gateway was moved to a different block.

### Version 1.13.x

#### Summary of Key Improvements

- ▶ Improved UI for better usability and efficiency.
- ▶ New Profiles section for managing Time and Access settings.
- ▶ Enhanced reporting features, including new reports and better filter management.
- ▶ Hardware upgrades, including an overview page and PAC Gateway support.

#### UI Enhancements

- **Terminology** update "Residences" are now referred to as Flats.
- **Record display** will allow up to 100 records to be shown per page.
- **Filter options** are shown collapsed as default for a cleaner interface.
- **+ Add New** button is displayed at the top of all relevant pages.
- **Filter Reset** button clears all filter settings.
- **Active Filter** flag indicates when a filter is active.
- **Sort** option enables records on display to be sorted on different fields.
- **Edit** option is a pencil icon to indicate editable fields.
- **More Options** ( ⋮ ) is a quick-access menu for additional context actions. E.g. edit and delete.

#### New Functionality

Profiles Section is a dedicated feature for Time and Access management.

##### Time Profiles

- Define a time period or a weekly schedule using predefined templates or custom settings.
- Can be applied to a Door or an Access Profile (not applicable to Blocks managed by a GDX Gateway).
- Each profile requires a unique name and an optional description.

##### Access Profiles

- Define an Access Area or a group of Access Areas with a unique name and description.
- Can include a Time Profile if applicable.
- Used to grant access to Tenants or Staff members.

##### Hardware Overview

Provides operators to quickly determine the status of each Estate and its associated Gateways.

##### Reports Enhancements

Includes the following improvements and additions:

- Pre-report filters are available before generating a report and can be tailored.
- New reports
  - Unused Token Report
  - Void Flat Report
  - Token Access & Tracked Report

- Progress bar shows real-time progress of report generation, including the number of lines processed.
- Defined filters remain applied across sessions.
- Interruption handling during report generation means collected data, up to the point of the interruption, is still displayed.
- Search limit notification prompts when report search exceeds 40,000 lines and advises users to refine their filters.
- Large Report Handling
  - Reports exceeding 4,000 lines will not be displayed in the UI.
  - Can be sent directly to specified email address or exported as a CSV file.
- Email reports option to send reports directly from the UI to an email recipient.

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## Hardware Enhancements

- New hardware addition – PAC Gateway
- Support for PAC 51x DCi and DC controllers.
- Enables management of up to eight doors within Housing Central.

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## Version 1.8.28

### Bug Fixes

- Newly added tenants being denied access on newly created blocks.

## Version 1.7.19

### Maintenance

- Optimisation and refactoring

## Version 1.6.11

### Maintenance

- Optimisation and refactoring

## Version 1.5.16

### Bug Fixes

- GDX Gateway indicating a red status and no longer syncing.

## Version 1.4.2

### Bug Fixes

- GUI not updating details of new device additions.
- Unknown event in Gateway from a controller that is unable to be added to the Gateway.

## Version 1.3.x

### Bug Fixes

- Fire Switch activation returns the incorrect event.

## Version 1.2.x

### Bug Fixes

- Duplicate Block Area name allowed.

## i) Introduction

Welcome to Housing Central™.

Your screen is divided into three general areas:

1. Navigator menus and administration tools.
2. Filters and messages.
3. Main window.



### Navigator menus

Each menu on the left will open the relevant screen or tool indicated.

### Filters and messages

On most pages you can use the filter tools to quickly find a specific item or shorten the list of results. Any system messages will appear at the top of the page in a yellow or red bar.

Key Seek will search for a Key Code and show the staff member or Tenant details for any matching result.

### Home Page

The main window provides a snapshot of your system. Each tile has interactive 'hot spots' that can be used as short cuts to open the relevant menu.

**Keys** shows the current number of registered keys.

**Flats** provides an overview of your Estate.

**Hardware** indicates installed equipment or devices.

**Events** is a 24-hour summary of access requests and system events.

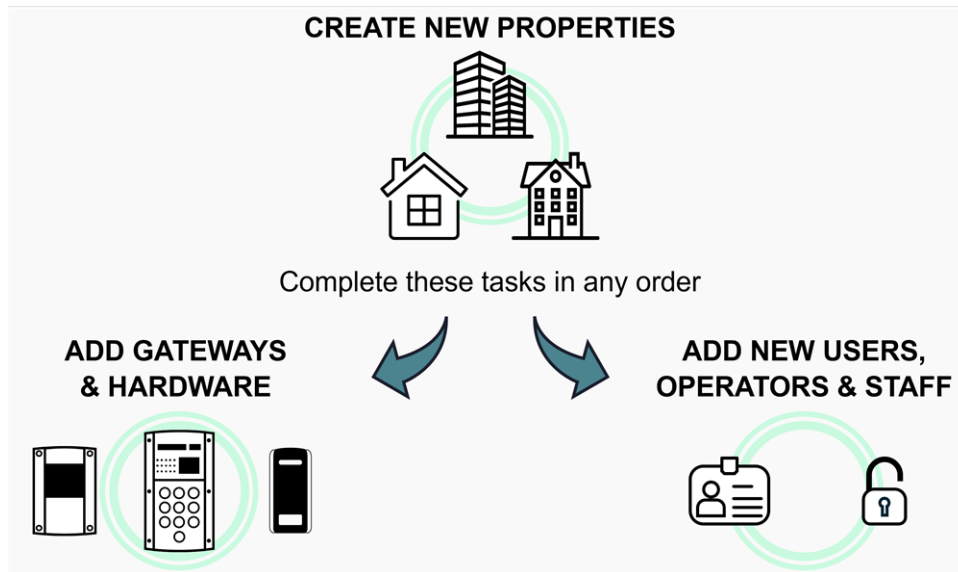
All users can click  (Navigation Path) to return to the Home Page.

Multi-site users can also click the **Site** link under the Housing Central logo.

Additionally **Multi-site users** can click the Housing Central logo (left corner) to return to the Customer Selection page.




## ii) Getting Started




## iii) Find Your Data

### Navigation Path

 > **Staff** > Add Staff

Each page shows an interactive **Navigation Path** that shows your previous (green) locations and can be clicked to return to a previous screen .

Click the  Home icon to return to the home page.

### Search

Search hardware/ keyholders/property

SUBMIT

Search for and display a list of any (partial) matches of the search terms.

Type in the **SEARCH** box and click **Submit** to perform the search when you are ready.

- Single letters, partial or whole words, and phrases are allowed.
- Upper- or lower-case letters are ignored.

To reset just click on the menu again in the left-hand panel.

Examples of search terms that would result in positive matches:

- "p": Any item that has the letter 'p' anywhere in the name.
- "pla": Any item that has the exact string 'pla' anywhere in the name.
- "place": Any item that has the exact word 'place' anywhere in the name.



**Wildcards are only supported in System Events and System Reports.**

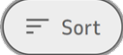






### Filter



The Filter button opens the Filter bar (above the main list) and can reduce the number of list items you are viewing. Use any of these methods to filter:

- Select filter values from drop-down boxes
- Type in any of the filter boxes and click **Apply** to see the results.

You can also type the first letter of a word in the **drop-down filter** to jump to the first

	<p>item beginning with that letter.</p> <ul style="list-style-type: none"> <li>• Keep pressing the same letter to cycle through all entries that begin with that letter. Click <b>Reset</b> at any time to reset the filters and display the full list again.</li> </ul>
Sort	 <p>Use Sort Order to change the alphabetical order of the list the items</p> <ul style="list-style-type: none"> <li>• <b>Ascending</b> lists items from 'A' to 'Z' order.</li> <li>• <b>Descending</b> lists items from 'Z' to 'A' order.</li> </ul>
+ Add New	 Click this button to add a new item for the page you are viewing.
Edit	 Click this button to edit the properties of an item.
More Options	 Click this button for more command options.
Delete	 Click this button to remove the item you are viewing.
Pop-out	 Click this button to read more information in a pop-up window.
Link	 Click this button to open the item referred to.
Table Rows on display	<div> <div>10</div> <div>▼</div> <div>1 - 10 out of 626 rows</div> </div> <p>Click this option to change the number of rows displayed per Table.</p>
Table Row Navigation	<div> <div>First</div> <div>Previous</div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> <div>Next</div> <div>Last</div> </div> <p>Click these buttons to move between results 'pages' in the table.</p> <ul style="list-style-type: none"> <li>• <b>First / Last</b> = Jump to the beginning or end respectively of the results</li> <li>• <b>Previous / Next</b> = Move backwards or forwards by one 'page' of results</li> <li>• <b>Green Box</b> = Current results 'page' number</li> <li>• <b>Numbers</b> = Shows current results 'page' in view and can show up to four 'pages' before / after the current position depending on the total number of results</li> </ul>



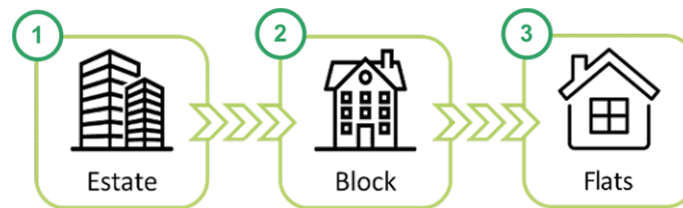
## 1.0 Properties

Use this menu to create and manage all buildings, rooms or areas that may be used by Tenants, Keyholders and Staff.

When the main property structure is created you can use all of the other system tools to assign hardware, tenants, keyholders, access permissions, staff, and operators, and perform management tasks to monitor the health and activity of your Estate hardware.

You can also bulk import data via **System > Tools**. There are a variety of flexible CSV (comma separated value) formats that will let you add new records easily and quickly.

### Property Types



Create Property assets in this order:

1. **ESTATES** — An Estate is a selected set of buildings that is part or all of your Residential Housing system.
  - a. It is the top-level group where Blocks are associated.
  - b. One Estate can include one or more Blocks. These blocks could be at the same location, share a postcode or have shared attributes e.g., using a dial-up connection.
2. **BLOCKS** — A Block is typically a single building.
  - a. This group is created after the parent Estate and is the container for your Flats.
  - b. One Block is made up of one or more Flats.
3. **FLATS** — Flats are apartments or residences where Tenants live.
  - a. This group is created after the parent Block and is the container for your Tenants.
  - b. A Flat can be occupied by one or more Tenants.


## 1.1 Estates

In this screen you can view and manage all of your Estates.



<b>Estate Name</b>	The name of the Estate.
<b>Description</b>	User defined free text.

### 1.1.1 Add Estate

 You must create an **Estate** before you can add any **Blocks**. **Name** is required and must be unique.

Follow the steps below to create new Estates.

1. Select **PROPERTIES > Estates** from the navigation menu.
2. Click **+ Add Estate**.

## Details


1. Type in the **Name** of the Estate.
2. Optional: Type in the **Description**.
3. Choose one of these options to continue:
  - Click **Save** to confirm all changes and return to the previous list.
  - Click **Save and Add Another** to confirm the new details and add another item.
  - Use the **Navigation Path** to return to the previous list.

### 1.1.2 Edit (Estate)



An **Estate** cannot be reassigned once it has been associated to a **Gateway**.

Follow the steps below to edit Estates.



1. Select **PROPERTIES > Estates** from the navigation menu.
2. Click **Edit**  next to the item to be updated.
3. Amend any **Details** as required.
4. Choose one of these options to continue:
  - Click **Save** to confirm all changes and return to the previous list.
  - Use the **Navigation Path** to return to the previous list.

### 1.1.3 Delete (Estate)



An **Estate** cannot be deleted once if it has any associated **Blocks**.

Follow the steps below to delete Estates.

1. Select **PROPERTIES > Estates** from the navigation menu.
2. Click **More Options**  at the end of the required row.
3. Select **Delete**  and click **Delete** again to confirm.

## 1.2 Blocks

Use this menu to create and manage all buildings, rooms or areas that may be used by Tenants, Keyholders and Staff.



<b>Block Name</b>	The name of the Block.
<b>Block Description</b>	User defined free text.
<b>Estate</b>	The Estate where this Block is located.

### 1.2.1 Add Block




You must create an **Estate** before you can add any **Blocks**.  
**Name** is required and must be unique.


Follow the steps below to create new Blocks.

1. Select **PROPERTIES > Blocks** from the navigation menu.
2. Click **+ Add Block**.


### Details tab

1. Type in the **Name** of the Block.
  2. Optional: Type in the **Description**.
  3. Select the **Estate** from the drop-down list.
  4. For GDX systems only, select the **Comelit CCU** from the drop-down list.
  5. Choose one of these options to continue:
    - Click **Save** to confirm all changes and return to the previous list.
    - Click **Save and Add Another** to confirm the new details and add another item.
    - Use the **Navigation Path** to return to the previous list.
-  You can add all details at once, in one or more of the tabs and then save at the end.


### Block Areas tab

6. **Block Areas** (optional)
    - i) Optional: Click **+ Add Block Area** to add a new Block Area.
    - ii) Type in the new Area name.
    - iii) Click **+ Add Block Area** to add another Area.
  7. Choose one of these options to continue:
    - Click **Save** to confirm all changes and return to the previous list.
    - Click **Save and Add Another** to confirm the new details and add another item.
    - Use the **Navigation Path** to return to the previous list.
-  You can add all details at once, in one or more of the tabs and then save at the end.

### 1.2.2 Edit (Block)

 A **Block** cannot be reassigned once it has been associated to an **Estate**.

Follow the steps below to edit Blocks.



1. Select **PROPERTIES > Blocks** from the navigation menu.
2. Click **Edit**  next to the item to be updated.
3. Choose one of these options to continue:
  - Click **Save** to confirm all changes and return to the previous list.
  - Use the **Navigation Path** to return to the previous list.

### 1.2.3 Delete (Block)



A **Block** can only be deleted if it does not hold any **Flats**.

Follow the steps below to delete Blocks.

1. Select **PROPERTIES > Blocks** from the navigation menu.
2. Click **More Options**  at the end of the required row.
3. Select **Delete**  and click **Delete** again to confirm.

## 1.3 Flats

Use this menu to create and manage all dwellings that will be inhabited by Tenants.



<b>Flat Name</b>	The name of the Flat.
<b>Estate</b>	The Estate where this Flat is located.
<b>Block</b>	The Block where this Flat is located.
<b>Block Area</b>	The Block Area this Flat is associated with.
<b>Block Description</b>	Read-only Block description.

### 1.3.1 Add Flat



You must create a **Block** before you can add any **Flats**.  
Flat **Name** is required and must be unique.

Follow the steps below to create new Flats.

1. Select **PROPERTIES > Flats** from the navigation menu.
2. Click **+ Add Flat**.

#### Details tab

1. Select the **Estate** from the drop-down list.
2. Select the **Block** from the drop-down list.
3. Optional: Select the **Block Area** from the drop-down list.
4. Type in the **Name** of the Flat.
5. Optional: Click **+ Additional Info** can be used to store the flat address details or other non-confidential information.
6. **Confidential Info** will only be seen by system administrators.
7. Choose one of these options to continue:
  - Click **Save** to confirm all changes and return to the previous list.
  - Click **Save and Add Another** to confirm the new details and add another item.
  - Use the **Navigation Path** to return to the previous list.



You can add all details at once, in one or more of the tabs and then save at the end.

### Handset tab


**For GDX systems only.** This is a read-only page that shows the details of the connected handset. Please contact your installer to clarify any details shown.

### 1.3.2 Edit (Flat)



A **Flat** cannot be reassigned to another Estate or Block once it has been created.

Follow the steps below to edit Flats.



1. Select **PROPERTIES > Flats** from the navigation menu.
2. Click **Edit**  next to the item to be updated.
3. Amend any **Details** and **Handsets** (if present) as required.
4. Choose one of these options to continue:
  - Click **Save** to confirm all changes and return to the previous list.
  - Use the **Navigation Path** to return to the previous list.

### 1.3.3 Delete (Flat)



A **Flat** cannot be deleted if there are **Tenants** present.

Follow the steps below to delete Flats.

1. Select **PROPERTIES > Flats** from the navigation menu.
2. Click **More Options**  at the end of the required row.
3. Select **Delete**  and click **Delete** again to confirm.

## 2.0 Hardware

In this section you can view and manage all of your installed Access Control and/or Door Entry equipment and handset connection information for flats.

All of the hardware including Gateways, Controllers, Entrance Panels and Readers are registered in a secure database. Each one is made available to the correct Residential Estate and can only be assigned during the installation using a unique serial number.

### Hardware Types

These are the categories of hardware devices and basic of each type.

<b>GDX Gateway</b>	This gateway provides connectivity between installed equipment and housing central in the cloud.
<b>GDX Hardware</b>	<p>Door Entry devices &amp; equipment.</p> <ul style="list-style-type: none"> <li>a. Entrance Panels are installed at the entry point to a building or secure area and are used to transfer calls from visitors to residents / concierge services and communicate access requests.</li> <li>b. Vandal Readers (sometimes referred to as Back Door Readers) can be used to allow secure entry for anyone with a security credential.</li> </ul>



Each GDX hardware device will control access through 1 door for GDX systems.

<b>PAC Gateway</b>	This gateway provides connectivity between installed equipment and housing central in the cloud.
<b>PAC Hardware</b>	<p>Access Control devices &amp; equipment.</p> <ul style="list-style-type: none"> <li>a. Controllers are installed near an entry point to a building or secure area.</li> <li>b. Readers can be used to allow secure entry for anyone with a security credential.</li> </ul>



Each PAC Gateway will support max. 8 doors, (over max. 4 × IP connections.)

## 2.1 Hardware Overview

This screen provides a system overview of connected devices.

<b>Estate</b>	The Estate where this Gateway is installed.
<b>Gateway</b>	User defined name and serial number for the Gateway.
<b>Connection Type</b>	Shows how this Gateway communicates with the system.
<b>IP Address</b>	IP address of the Gateway.
<b>Status</b>	Indicates the status of the Gateway.
<b>First Connected</b>	Date this Gateway first connected to the system.
<b>Last Sync</b>	Date of the last synchronisation of this Gateway
<b>Controller Count</b>	Shows number of controllers on this Gateway and their connection status.

### 2.1.1 Export to CSV


Follow the steps below to export this table to a CSV file.

1. Click **Export to CSV** from the tool bar.
2. Select your save location and filename.
3. Click **Save** to create the file.
4. The CSV file can be opened with appropriate software e.g. Excel.

### 2.1.2 Email...

Follow the steps below to send an email:

1. Click **Email...** from the tool bar.
2. Input the recipient email address.

 Please check the email address is valid.  
Only one email address can be used.

3. Click **Send** to confirm the details and send an email or click **Cancel** to return to the Hardware Overview page.
4. The Hardware report shows all the connected devices on your site.

## 2.2 Gateways








In this screen you can view and manage all your Gateways.

<b>Gateway Name</b>	User defined name for the Gateway.
<b>Description</b>	Optional user defined field if needed.
<b>Estate Name</b>	The Estate where this Gateway is installed.
<b>Connection</b>	Shows the connection status and IP address of modem.
<b>State</b>	Indicates the status of the Gateway and Controller this hardware is associated with.



## Gateway State Indicators

The Gateways list **State** will show the current condition of the Gateway.

Indicator		Gateway sync status
	Grey	Never synced
	Green	Recently synced
	Amber	Local comms fail
	Red	Sync is overdue
	Red Alert	Gateway reset needed
	No. of pending updates	n/a
	Firmware upgrade available	n/a

### 2.2.1 Add Gateway

This process will enable the a to be added to Housing Central.



You must create an **Estate** before you can add any **Gateways**.  
**Serial number, Name and Estate** are required.

Follow the steps below to add Gateways.

1. Select **HARDWARE > Gateways** from the navigation menu.
2. Click **+ Add Gateway**.
3. Optional: Click **New Estate** to [Estates](#).

#### Details

1. Enter the Gateway Serial Number (found on the gateway or on the spare serial number labels provided in the original packaging.)  
The **Device Type** will be populated when the Serial Number is matched.
2. Optional: Click **Description** to add more details.
3. Select the **Estate** from the drop-down list.
  - i) If the Estate does not exist please see [Estates](#).
4. Choose one of these options to continue:
  - Click **Save** to confirm all changes and return to the previous list.
  - Click **Save and Add Another** to confirm the new details and add another item.
  - Use the **Navigation Path** to return to the previous list.


### 2.2.2 Set Password

This process will ensure secure communications are set up between the gateway and Housing Central.


Follow the steps below to set the password in Housing Central.

1. Select **HARDWARE > Gateways** from the navigation menu.
2. Click **Edit** next to the gateway to be updated.
3. Copy the **Serial Number**.
4. Click **Set Password** link under the relevant gateway.


5. Input the password into the **Password** and **Confirm Password**.
6. Choose one of these options to continue:
  - Click **Save** to confirm all changes and return to the previous list.  
The Gateway will also synchronise with the system.
  - Use the **Navigation Path** to return to the previous list.

 The password in Housing Central and the Gateway **MUST** match.  
Refer to the Gateway set up guide to reset the password on the device.

### 2.2.3 Edit (Gateway)

 A **Gateway** cannot be reassigned to another Estate once it has been created.


Follow the steps below to edit Gateways.

1. Select **HARDWARE > Gateways** from the navigation menu.
2. Click **Edit**  next to the item to be updated.
3. Amend any **Details** as required.
4. Choose one of these options to continue:
  - Click **Save** to confirm all changes and return to the previous list.
  - Use the **Navigation Path** to return to the previous list.

### 2.2.4 Delete (Gateway)

 A **Gateway** cannot be deleted if it is associated with an Estate.

Follow the steps below to delete Gateways.

1. Select **HARDWARE > Gateways** from the navigation menu.
  - Click **More Options**  at the end of the required row.
  - Select **Delete**  and click **Delete** again to confirm.

### 2.2.5 List Controllers (Gateway)

Follow the steps below to list all controllers connected the the Gateway.

1. Select **HARDWARE > Gateways** from the navigation menu.
2. Click **List Controllers** link under the relevant gateway.  
See **Controllers (equipment)** section for details.
3. The filtered list showing all controllers linked to this gateway will be displayed.
4. Choose one of these options to continue:
  - Click **Save** to confirm all changes and return to the previous list.
  - Use the **Navigation Path** to return to the previous list.

### 2.2.6 Firmware Upgrade Availability



This icon indicates that a firmware update is available for the Gateway.

If you have received advice from Technical Support that the firmware requires re-applying or updating follow these steps.

1. Select **HARDWARE > Gateways** from the navigation menu.
2. Click **Upgrade Firmware** link under the relevant gateway.
3. Select the appropriate **Version** to update:



Remember to perform a download to all controllers afterwards.

- i) Click **Upgrade** OR click **ReApply** next to the Version.
- ii) "Confirm Firmware Upgrade" pop-up will appear.
- iii) Click **Upgrade** to confirm the action.

## 2.3 Controllers

In this screen you can view and manage all your Controllers.

<b>Name</b>	User defined name for the hardware.
<b>Gateway</b>	The gateway this hardware is associated with.
<b>Type</b>	Confirmation of the hardware device.
<b>Serial No.</b>	The identification of the hardware device.
<b>Access</b>	Specifies the area this hardware controls access for.
<b>State</b>	Indicates the status of the Gateway and Controller this hardware is associated with.

### 2.3.1 Add Controller



**Serial number** and **Name** are required.

Remember to **Edit** the controller and add the required access details for the **Door(s)**.

Follow the steps below to add new Controllers.

1. Select **HARDWARE > Controllers** from the navigation menu.
2. Click **+ Add New**.

#### Details tab

1. Select the **Gateway** from the drop-down list.



Please follow the appropriate steps for your **Controller**.

#### For GDX Controllers








- i) Select the **Device Type** from the drop-down list.
- ii) Select the **Block** from the drop-down list.
- iii) Select the **Controller Number** from the drop-down list.
- iv) Type the **Name** from the drop-down list.
- v) Select the **Location** from the drop-down list.

#### For PAC Controllers

- i) Select the **Device Type** from the drop-down list.
  - ii) Type the **Serial Number** for the Controller.
  - iii) Type the **Name** from the drop-down list.
  - iv) Optional: Type the **Location**.
2. Click **Save** to save the new details and return to the Controllers list,  
Or click **Go To Controllers** at any time to discard any unsaved record and return to the Controllers list.

## 2.3.2 Controllers State Indicators

The Gateways list **State** will show three indicators to reveal the current status of the Gateways' synchronisation, communications to a Controller and download activity.

Indicator		1st indicator Gateway sync	2nd indicator Controller Comms	3rd indicator Controller Download
	Grey	Never synced	Unknown	Uploaded or Unknown
	Green	Recently synced	Comms OK	Loaded
	Amber	Local comms fail	n/a	Loading
	Red	Sync is overdue	Comms failed	Download failed
	Red Alert	Gateway reset needed	n/a	n/a
	No. of pending updates		n/a	n/a
	Indicates a download will be triggered on the next gateway sync.			

## 2.3.3 Download (Controller)

This process will download the latest access database to the chosen controller.



Repeat these steps for all controllers.


1. Select **HARDWARE > Controllers** from the navigation menu.
2. Click **Download**.
3. "Confirm Controller Download" pop-up will be displayed.
4. Click **Download** to initiate the download.

## 2.3.4 Edit (Controller)



**Name** and **Gateway** are required.

Follow the steps below to edit Controllers.

1. Select **HARDWARE > Controllers** from the navigation menu.
2. Click **Edit**  next to the item to be updated.

### Details tab

**Serial Number** is read-only.

1. Optional: Edit the **Name**.
2. **(PAC Controllers only) IP address** is a text field and not automatically populated. Use this field to keep a record of the assigned IP address.
3. Optional: Type in or edit **Location**.
4. Optional: Select a different **Gateway** from the drop-down list.
5. Optional: Click **Go To Gateway** to view the details for the selected Gateway. Remember to use the 'back' button on your browser to return to this page or all changes will be lost.
6. Choose one of these options to continue:

- Click **Save** to confirm all changes and return to the previous list.
- Use the **Navigation Path** to return to the previous list.


## Controllers: Editing Doors

GDX Controllers can be configured to control access through one door.  
PAC 511 DCi Controllers can be configured to control access through one door.  
PAC 512 DCi and DC Controllers can be configured to control access through one or two doors.

### GDX Controllers – Door1 tab


Readers	
<b>Access Area</b>	Must be selected to allow access to through this door.
<b>Estate</b>	Shows which Estate this controller is associated with.
<b>Block</b>	Shows which Block this controller is associated with.
<b>Block Area</b>	If used, can be selected from the drop-down list.
<b>View Block</b>	Opens a pop-up window showing the Block details.
<b>New Block</b>	Click + <b>Add Block Area</b> to create a new Block if required.
Configuration	
<b>Door Number</b>	Will depend on the allocation of the associated Line Card.
<b>Service Periods</b>	Optional feature to enable fixed periods of access for trades.
<b>1st</b>	Select to use. <b>From &amp; To</b> indicate the start and finish time in 24hr time format.
<b>2nd</b>	Select to use. <b>From &amp; To</b> indicate the start and finish time in 24hr time format.
<b>Effective on Sundays</b>	Select to use. Enables time periods to be active on Sunday.

### PAC Controllers – Door 1 & Door 2 tabs



Readers	
Door 1 and Door 2 can support up to two PAC readers for each door (Read-In and Read-Out.)	
<b>SIG A</b>	Select to allow (Read-In) access to through this door.
<b>SIG B</b>	Select to allow (Read-Out) access to through this door. <div>  Can <u>ONLY</u> be used on the same door as <b>SIG A</b>. </div>
<b>Block</b>	Select which Block this controller is associated with.
<b>Block Area</b>	If used can be selected from the drop-down list.
<b>View Block</b>	Opens a pop-up window showing the Block details.
<b>New Block</b>	Click + <b>Add Block Area</b> to create a new Block if required.
Configuration	
<b>Lock Release Time (1-60)</b>	Duration in seconds door lock will be unlocked.

<b>Extra Door Time (1-60)</b>	Duration in seconds to extend door lock period. <i>This is enabled in the Tenants for the keyholder.</i>
<b>Door Monitoring (1-3600)</b>	Duration in seconds the door can remain open before triggering an alert. Also alerts if the Door has been forced.
<b>Time Profile</b>	Select the required Time Profile from the drop-down list. This is created in the <b>PROFILES &gt; Time</b> menu.

### 2.3.5 Delete (Controller)

 A **Controller** CAN be deleted even when associated with an Estate.

Follow the steps below to delete Controllers.

1. Select **HARDWARE > Controllers** from the navigation menu.
  - Click **More Options**  at the end of the required row.
  - Select **Delete**  and click **Delete** again to confirm.

### 2.3.6 Disable (Controller)



Disabling a controller will prevent communications to the controller and any associated secondary controllers. It will continue to work as an offline controller.  
No updates will be sent, the controllers cannot be probed, and you will not be able to use the download feature until it is enabled again.

Follow the steps below to DISABLE the Controller.

1. Select **HARDWARE > Controllers** from the navigation menu.
2. Click **Disable** next to the Controller.
3. "Confirm Controller Disable" pop-up will be displayed.
4. Click **Disable** to confirm the action.

Follow the steps below to ENABLE the Controller.

1. Select **HARDWARE > Controllers** from the navigation menu.
2. Click **Enable** next to the Controller.
3. "Confirm Controller Enable" pop-up will be displayed.
4. Click **Enable** to confirm the action.

### 2.3.7 Probe (PAC Controller)

Follow the steps to probe for secondary controllers.

1. Select **HARDWARE > Controllers** from the navigation menu.
2. Click **Probe** under the relevant Controller.
3. "Confirm Controller Probe" pop-up will be displayed.
4. Click **Probe** to confirm the action.
5. The message bar will confirm a probe has been scheduled and there will be a short delay.
6. Any unassigned controllers connected to the primary controller will be displayed in the Probe list.
7. Select one, multiple controllers or all controllers.
8. Click **OK** to add them to the primary controller.
9. All new controller serial numbers will appear in the Controllers list, with a line connecting them to their primary controller.

## 2.4 Handsets (GDX systems only)

In this screen you can view any handsets that are installed in your system.



**Please consult with your installer before making changes.**


This is a record of the physical handset line connection from a Line Card to the flat and may not work as expected if changed.

<b>Estate</b>	The Estate where the Handset is installed.
<b>Block Name</b>	The Block the Handset is installed in..
<b>Line Cards</b>	Identification of Line Card the Handset is connected to.
<b>Handsets</b>	The amount of Flats that have Handsets on the Block.

### 2.4.1 Edit (Handset)

Follow these steps to assign a Handset to a Line Card slot.

1. Select **HARDWARE > Handsets** from the navigation menu.

2. Click **Edit**  next to the item to be updated.

The current list of Line Card **Slot** connections and the Flat associated is displayed.

3. **To assign new handsets:**

- Find the row for the appropriate **Slot** where the handset in the Line Card slot is installed in the selected Flat.
- Use the drop-down menu to select the installed Flat.
- Repeat for remaining installed Flats.



Please remember to check with the Installer to ensure Handsets are correctly assigned to the Line Card and Slot where they are physically installed.


4. Click **Save** to save the new details and return to the Handsets list,

Or click **Go To Controllers** at any time to discard any unsaved record and return to the Handsets list.

### 2.4.2 Add Line Card

The Line Card address, '0', '1', '2', etc., is managed automatically by the system.

1. Select **HARDWARE > Handsets** from the navigation menu.

2. Click **Edit**  next to the item to be updated.

The current list of Line Card **Slot** connections and the Flat associated is displayed.

- Each Line Card can be connected to a maximum of 16 handsets.
- The installer will connect the handset in a flat to the Line Card shown.

3. Click **+ Add Line Card**.

A new column will be displayed and the Line Card number will be incremented from the previous Line Card.

4. To assign a handset to a **Flat**:

- Find the row for the appropriate **Slot** where the handset is connected.
- Use the drop-down menu to select the installed handset.
- Repeat for remaining installed handsets.



Please remember to check with the Installer to ensure Handsets are correctly assigned to the Line Card and Slot where they are physically installed .



The number of populated Slots will depend on the total number of Flats.

- A Slot can only be connected to ONE Flat.
- A Flat can only be assigned ONCE.
- The system will warn if a Flat has been assigned more than once.

5. Click **Save** to save the new details and return to the Handsets list,  
Or click **Go To Handsets** at any time to discard any unsaved record and return to the Handsets list.

### 3.0 Keyholders

In this section you can administer any type of Keyholder e.g., a Resident, Staff member or visiting contractor.

### 3.1 Tenants

In this screen you can manage all **Tenant** records.

The main table displays the Flats available and can be filtered using the selection options above the table.


<b>Flat Name</b>	Typically the first line of the address or just the door number.
<b>Estate</b>	The Estate where this Flat is located.
<b>Block</b>	The Block where this Flat is located.
<b>Block Area</b>	If Block Areas are used, the Block Area that the Flat is associated with.
<b>Extra Access</b>	Indicates if any Keyholder in the flat has been granted Extra Access.

#### 3.1.1 Add Tenants



The **Tenants** button can be used to add and configure Tenants for this Flat.  
**Key Code** is required and must be unique.

Follow the steps below to add Tenants.

1. Select **KEYHOLDERS > Tenants** from the navigation menu.
2. Click **Edit**  next to the item to be updated.

#### Tenants tab


1. Click **+ Add New** to enter new Tenant details.
2. **Principal Token** should be checked if this is the main Keyholder.
3. Optional: Click **Tenant Name** to add the full name of the Tenant.
4. **Key Code** is a user defined field to enter the Tenant's unique Key Code.
5. Optional: Select the appropriate colour from the drop-down list.
6. Optional: Add the appropriate email address.
  - Select **Lost** if the Key has been reported lost.  
This Key will be disabled and reported in **System > Reports (Token Access & Tracked)**.
  - Select **Track token** to highlight access requests for this Key.  
This Key will be reported in **System > Reports (Token Access & Tracked)**.
7. Select **Extra Access** to grant additional access rights to this Keyholder.
8. Select **Requires extra door time** to increase the length of time a door will remain unlocked when this Key is used.
9. Click Set **Default Access** to update the Default Access areas for future Tenant records.
10. Choose one of these options to continue:
  - Click **Save** to confirm all changes and return to the previous list.
  - Use the **Navigation Path** to return to the previous list.



You can add all details at once, in one or more of the tabs and then save at the end.

### Access tab

- Access tab:** If required, select the **Access** tab to set the access areas.  
Default Access Areas are indicated in expanded branches
  - Each **Area** is listed for the whole Estate.
  - Click any arrow pointing right to see the full list of areas contained.
  - Click any empty box next to the Area name to select this area and ALL areas in the same branch.
- Choose one of these options to continue:
  - Click **Save** to confirm all changes and return to the previous list.
  - Use the **Navigation Path** to return to the previous list.


 You can add all details at once, in one or more of the tabs and then save at the end.

### Extra Access tab (optional)




Personal Access Groups are shown in **Profiles > Access** as “*Staff <user name>*” and cannot be used for Extra Access.

- Optional: Select the **Extra Access** tab to permit access to additional areas.  
Default Access Areas are indicated in expanded branches
  - Each **Area** is listed for the whole Estate.
  - Click any arrow pointing right to see the full list of areas contained.
  - Click any empty box next to the Area name to select this area and ALL areas in the same branch.
- Click **Set Default Access** to reset the key access privileges for this Tenant’s key.
- Choose one of these options to continue:
  - Click **Save** to confirm all changes and return to the previous list.
  - Use the **Navigation Path** to return to the previous list.

 You can add all details at once, in one or more of the tabs and then save at the end.

### 3.1.2 Delete (Tenant)

Follow the steps below to delete Tenants.

- Select **TENANTS** from the navigation menu.
- Select **Delete**  and click **Delete** again to confirm.

## 3.2 Staff

In this screen you can manage all **Staff** records.

The main table displays all Staff details, which can be filtered using the selection options above the table.

<b>Last Name</b>	Surname of the staff member.
<b>First Name</b>	Forename of the staff member.
<b>Category</b>	User defined value for use with <b>Staff</b> records only.
<b>Estate</b>	The default Estate that was used for the Operator privileges.

### 3.2.1 Add Staff

Follow the steps below to add Staff.

1. Select **KEYHOLDERS > Staff** from the navigation menu.
2. Click **+ Add New** to create new Staff members.

#### Details tab

Add the basic Staff details in this page.



Last Name is required.

1. Select Default Estate from the drop-down list - this is used to determine the default Operator's privileges for this staff member.
2. Type the surname in **Last Name**.
3. Optional: Add a **Title**, **First Name**, and one or more **Initials**.
4. Optional: Select a Category from the drop-down list.



If there are no categories in the list please see **CONTROL > TOOLS: CATEGORIES**  
You can still add the new Staff member and edit the record to add a **Category** later.

5. Optional: Type a **Department**.
6. Optional: Select **Requires extra door time**.
7. Choose one of these options to continue:
  - Click **Save** to confirm all changes and return to the previous list.
  - Click **Save and Add Another** to confirm the new details and add another item.
  - Use the **Navigation Path** to return to the previous list.



You can add all details at once, in one or more of the tabs and then save at the end.

#### Address tab

Add the Staff member address in this page.

1. Type the first line of the address in **+ Address Line 1**.
2. Type the second line of the address in **+ Address Line 2**.
3. Type the postal town of the address in **Town**.
4. Type the postal county of the address in **County**.
5. Type the postcode of the address in **Postcode**.
6. Choose one of these options to continue:
  - Click **Save** to confirm all changes and return to the previous list.
  - Click **Save and Add Another** to confirm the new details and add another item.
  - Use the **Navigation Path** to return to the previous list.



You can add all details at once, in one or more of the tabs and then save at the end.

#### Keys tab

Add one or more **Keys** in this tab.

1. **Key Code**: Optional: Type in the appropriate Key Code.
2. **Key Colour**: Optional: Select the appropriate colour from the drop-down list.
  - Select **Lost** if the Key has been reported lost.  
This Key will be disabled and reported in **System > Reports (Token Access & Tracked)**.
  - Select **Track token** to highlight access requests for this Key.  
This Key will be reported in **System > Reports (Token Access & Tracked)**.

3. Click **+ Add Key** to add more keys for this Staff member.
4. To delete a Key, click the **X** button for the corresponding Key.
5. Click **Save** to confirm all changes,  
Or click **Save and Add Another** to save the new details and add another Staff member,  
Or click **Go To Tenants** to return to the Tenants list.



You can add all details at once, in one or more of the tabs and then save at the end.

### Access tab



1. **Access tab:** Optional: Select the **Access** tab to set the access areas.  
Default Access Areas are indicated in expanded branches
  - i) Each **Area** is listed for the whole Estate.
  - ii) Click any arrow pointing right to see the full list of areas contained.
  - iii) Click any empty box next to the Area name to select this area and ALL areas in the same branch.
2. Click **Save** to confirm all changes,  
Or click **Save and Add Another** to save the new details and add another Staff member,  
Or click **Go To Tenants** to return to the Tenants list.



You can add all details at once, in one or more of the tabs and then save at the end.

### 3.2.2 Delete (Staff)

Follow the steps below to delete Staff.

1. Select **STAFF** from the navigation menu.
2. Click **More Options**  at the end of the required row.
3. Select **Delete**  and click **Delete** again to confirm.


## 4.0 Profiles

### For PAC hardware only

In this section you can manage Profiles that restrict access periods for Doors via Time Profiles, and enable access permissions for Keyholders, via Access Profiles.

## 4.1 Time Profiles (PAC only)

In this section you can create Time Profiles for Doors. Each Profile is a set of "rules" that indicate when a Door is locked, unlocked or being managed with access control.

<b>Name</b>	The user defined name for the Time Profile.
<b>Description</b>	Optional: A user defined free text field to provide additional information about this Time Profile.  This box can be resized using the resizing handle in the lower right corner.

### 4.1.1 New Time Profile



A door can only have ONE Time Profile assigned at a time.  
It is easy to change a Time Profile for holiday seasons if required.

Follow the steps below to add Time Profiles.

1. Select **PROFILES > Time** from the navigation menu.
2. Click **+ Add New**.

<b>Name</b>	Type in the name of profile.
<b>Description</b>	Optional: If required provide a description.
<b>Time Profile Periods</b>	
<b>Start Day</b>	Indicates the first day this time period will apply to.
<b>Start Time</b>	Indicates the time (24 hour format) the Profile begins.
<b>End Day</b>	Indicates the last day this time period will apply to.
<b>End Time</b>	Indicates the time (24 hour format) the Profile ends.
<b>Add Time Period</b>	Adds another row to the table.
<b>Templates</b>	Drop-down list of predefined template patterns.



3. Type in the **Name** for this Profile.
4. Optional: Type in a **Description**.

### Using Predefined Templates



You can only have ONE predefined template in the Profile.  
You can edit the template to add as many days or time periods as required.



1. Select the required **Template** from the drop-down list.  
The selected Template will be displayed in the drop-down list box.
2. Make any custom changes required to the pattern.
3. Click **Copy Time Period** to duplicate the last row, which can then be edited.

4. To remove a row:
  - Click **More Options**  at the end of the required row.
  - Select **Delete**  and click **Delete** again to confirm.
5. Choose one of these options to continue:
  - Click **Save** to confirm all changes and return to the previous list.
  - Use the **Navigation Path** to return to the previous list.

### Custom Template Pattern (optional)




Predefined templates will replace the Profile pattern. We recommend selecting a template FIRST and then updating with your preferred changes.

1. Optional: Select a predefined Template to begin.
2. Change the values as required for each row.
3. To add a new row, Click **+ Add Time Profile**.
  - i) Select **Start Day** from the drop-down list.
  - ii) Specify a **Start Time** using the time pick list.
  - iii) Select **End Day** from the drop-down list.
  - iv) Specify a **End Time** using the time pick list.
4. Click **Copy Time Period** to duplicate the last row, which can then be edited.
5. To remove a row:
  - Click **More Options**  at the end of the required row.
  - Select **Delete**  and click **Delete** again to confirm.
6. Choose one of these options to continue:
  - Click **Save** to confirm all changes and return to the previous list.
  - Use the **Navigation Path** to return to the previous list.

## 4.2 Access Profiles

In this section you can create Access Profiles for Keyholders. Each Profile is a set of "rules" that indicate when and where a Keyholder can access.

<b>Name</b>	The user defined name for the Access Profile.
<b>Description</b>	Optional: A user defined free text field to provide additional information about this Access Profile.  This box can be resized using the resizing handle in the lower right corner.

### 4.2.1 New Access Profile

Follow the steps below to add Access Profiles.




1. Select **PROFILES > Access** from the navigation menu.
2. Click **+ Add New**.

#### Details tab


<b>Name</b>	Type in the name of profile.
<b>Description</b>	Optional: If required provide a description.



### With Time Profile

<b>Time Profile</b>	 Using a Time Profile will restrict the time periods this Keyholder is granted access to the selected area(s). Select the required profile from the drop-down list.  Click the link button to view the selected Time Profile.
<b>Access Areas</b>	Select the required area(s) to grant access for this Keyholder.  Access to this area is restricted by any selected Time Profile.

### Without Time Profile

<b>Access Areas</b>	Select the required area(s) to grant access for this Keyholder. Optional: Click > or < to expand or close an area for access to a specific location / door. This will also select any sub-locations in the same branch.  This Keyholder will have access to the selected area(s) at all times.
---------------------	--


3. Click **Save** to confirm all changes.

## 5.0 Control

In this section you can manage the status of all doors that are access controlled in your system.

Each GDX door can be unlocked by an operator via a remote RTE button.  
Each PAC door can be unlocked, locked, or be returned to normal door operation.

## 5.1 Doors


 **PAC door controllers** can manage up to 2 doors.  
Please see [Controllers](#) (**Hardware > Controllers**) for more details about configuring Doors.


<b>Name</b>	The name of the controller managing this Door.
<b>Controller Name</b>	The user defined name of the controller that manages this Door.
<b>Estate</b>	The Estate where this Door is located.
<b>State</b>	GDX doors do not show a status.
	<b>Unlocked:</b> Door is unlocked and may be accessed by anyone present.
	<b>Secured:</b> Door is secure (locked) and access is dependant on authorised keys and Time Profile restrictions.
<b>Time Profile</b>	The Time Profile associated with this door.

### 5.1.1 Door Overrides

#### PAC doors – Unlock the Door

Follow the steps below to unlock a door for 1 hour.


1. Select **CONTROL > Doors** from the navigation menu.
2. Click **More Options**  at the end of the required row.
3. Select **Unlock door**.


 This Door is unlocked and can be accessed by any person.  
No key authorisation is required during this period.

4. The Door will revert to normal operations when:
  - i) The time duration has elapsed.
  - ii) An operator overrides this state.
  - iii) Performing a download will revert the door to its normal operating.

#### PAC doors – Secure the door


Follow the steps below to secure a door.

1. Select **CONTROL > Doors** from the navigation menu.
2. Click **More Options**  at the end of the required row.
3. Select **Secure door**.

 This Door is locked and will only change state when overridden by an operator.  
Valid keys will also be prevented from access when the Door is **Secure**.

**GDX & PAC doors Request To Exit through the Door**

Follow the steps below to enable a door release.


1. Select **CONTROL > Doors** from the navigation menu.
2. Click **More Options**  at the end of the required row.
3. Select **RTE**.
4. The Door will be temporarily unlocked according to the Lock Release Time.

Please see section on editing **Doors** in [Controllers](#).

- i) GDX controllers set the Lock Release Time via the Panel Settings menu.  
Please see the hardware installation guide for more details.
- ii) PAC controller Lock Release Time is configured via **HARDWARE > Controllers** - Door configuration tab.

**PAC doors – Set the door to normal operations**

Follow the steps below to return the door to normal operations.

1. Select **CONTROL > Doors** from the navigation menu.
2. Click **More Options**  at the end of the required row.
3. Select **Set Normal**.
4. The Door will revert to normal operation and any active Time Profile will apply or the default Door operation will be enabled.

## 6.0 System

These tools are used to monitor and report on system events, create system administrators, and manage system data for Keyholders, staff and properties.

### 6.1 Events

In this section you can view and filter any events that have occurred by Tenants, Staff and Trades access for the last 24 hours.

The last 24 hours of Events are displayed in a table.

<b>Category</b>	Severity category of Event.
<b>Timestamp</b>	Time of Event.
<b>Source</b>	Hardware that captured the Event.
<b>Event Type</b>	List generic values?
<b>Estate</b>	The Estate where this Event was recorded.
<b>Block</b>	The Block where this Event was recorded.
<b>Flat</b>	The Flat where this Event was recorded.
<b>Controller</b>	The Controller that reported the Event.
<b>Door</b>	The Door associated with the Event.
<b>Keyholder</b>	The name of the Keyholder associated with the Event.
<b>Key Colour</b>	The Key Colour associated with the Event.
<b>Tracked?</b>	The Key Code of any monitored Key.
<b>Lost?</b>	The Key Code of any reported Key.

#### Filter Events

To filter the list of System Events follow the steps below.

1. Select **SYSTEM > Events** from the navigation menu.
2. Click **Filter** to view the filter options.
3. Select the required value(s) from **Refine Filters**.
  - i) For all **filter boxes with a drop-list**, select a value from the options available.
  - ii) Type a letter to jump to the first value that begins with that letter.

Each selection will update the available options in the next drop-down list.
4. Optional: Type the **Key Code** to be matched in **Token**.
5. Optional: Type a word or part of a word with a wildcard (asterisk "\*") in **Event Type** to filter the results for any match in the **Event Type** column.
6. Click **Apply Filters** to confirm your selections and return to view the updated results.
7. To clear the filter options, click **Reset**.

## 6.2 Operators

In this section you can view and manage the system Operators or Site Admins. Each Operator can be assigned permissions for any Estate.

<b>Name</b>	User defined name for the Operator.
<b>Role</b>	Site Admin or Operator.
<b>Email</b>	Email address of Operator. Also states if email has not been confirmed.
<b>Staff Name</b>	Displays name of Staff member from associated Staff record.
<b>Valid From</b>	Indicates the date the Operator privileges started or will start.
<b>Valid To</b>	Indicates the date the Operator privileges ended or will end.

### 6.2.1 Add Operators

Follow the steps below to add a new Operator.



Email, Operator Name and Staff Member are required.  
The Operator Name does not have to match any system name or email for this operator.

1. Select **SYSTEM > Operators** from the navigation menu.
2. Click **+ Add New** to create new Staff members.
3. Type a valid **Email** address.
4. Select a **Role**.
5. A Staff Member must be associated with an Operator.  
Click **Select** to open the Select Staff Member to associate with this account.




Type three or more characters in either or both search fields and click **Apply Filters** to find any matches.

6. Click **Select** next to the required Staff Member.
7. Optional: Select **Valid From**.  
i) Add an appropriate **Start Date**.
8. Optional: Select **Valid To**.  
i) Add an appropriate **End Date**.
9. Optional: To prevent an Operator account from gaining access to the system select **Account Disabled**.
10. Choose one of these options to continue:
  - Click **Save** to confirm all changes and return to the previous list.
  - Use the **Navigation Path** to return to the previous list.



You can add all details at once, in one or more of the tabs and then save at the end.

## 6.2.2 Edit Operator Details


 **Operator Name** and **Staff Member** are required.

To make changes to the Operator details follow the steps below.

1. Select **SYSTEM > Operators** from the navigation menu.
2. To create a new Operator click **+ Add New**.
3. Type in the **Email** to be used to contact this user.
4. Type in the **Operator Name**.

 This does not have to be the same name or spelling as the Staff Member name.

5. Select the **Role** required.
6. Click **Select** to choose the Staff Member.
  - i) Type in the **Operator Name**.
  - ii) Click **Select** to choose a Staff Member.
  - iii) Type in the **Last Name | First Name** boxes and click **Apply Filters** to search.
  - iv) Click **Select** for the required Staff member.

 If there are no matches change the search terms or consider adding this person as a Staff Member.

7. To create a new Staff Member click **Cancel** to return to the previous page.
8. Click **Add**. See [Staff](#) for more details.
9. Repeat the search and select the newly created Staff member.
10. Optional: Specify a start date for this Operator.
  - i) Select **Valid From**.
  - ii) Select the appropriate date from the date pick list.
11. Optional: Specify a end date for this Operator.
  - i) Select **Valid To**.
  - ii) Select the appropriate date from the date pick list.
12. Optional: To disable this account select **Account disabled**.
13. Choose one of these options to continue:
  - Click **Save** to confirm all changes and return to the previous list.
  - Use the **Navigation Path** to return to the previous list.

## 6.3 Reports

In this screen you can view and filter any system reports for any time period.

### Available Reports

<b>All</b>	Runs all reports for all records. We recommend applying a date range and using the filter options to limit the number of records included in the report.
<b>Alarm Reports</b>	Displays the Doors that have experienced an "Open door alarm".
<b>Call Reports</b>	Displays which Entrance Panel has called which Flat.
<b>Door Open Reports</b>	Displays which doors have been opened and how.
<b>Privacy Reports</b>	Displays which Flats have activated / deactivated Privacy periods.

<b>Token Access &amp; Tracked Reports</b>	<p>Displays where Lost or Tracked Keys have been used.</p> <ul style="list-style-type: none"> <li>• Tracked Keys are highlighted in GREEN.</li> <li>• Lost Keys are highlighted in RED.</li> </ul>
<b>Unused Token Reports</b>	Displays Keys that have been added to the system but not used.
<b>Void Flat Reports</b>	Displays Flats that do not have Tenants currently.

To create a Report follow the steps below.

1. Select **SYSTEM > Reports** from the navigation menu.



**We recommend applying a filter to your data to achieve quicker results.**

An unfiltered selection will include all of your data and take longer to run a report.

2. Select the required report from the **Report** drop-list.

### Apply Filters

3. Select the required value(s) from **Report** filters.
  - i) Select the **report options** if there multiple check boxes e.g., **Door Open Reports**, etc.  
Click **Select All** to select all report options or click **Clear All** to deselect all report options.
  - ii) For all **filter boxes with a drop-list**, select a value from the options available.  
Type a letter to jump to the first value that begins with that letter.

Each selection will update the available options in the next drop-down list.

4. Optional: Type the **Key Code** to be matched in **Token**.
5. Optional: Search for **Event Type** text matches.



Searches are **case sensitive**.

Type a word or part of a word, with a wildcard (asterisk "\*\*") at both ends of the word, in **Event Type** to filter the results for any match in the **Event Type** column. E.g. \*Synchronised\*

### Run Report

6. Click **Run** to confirm your selections and return to view the updated results.
7. To rerun the report with different filters:
  - i) Click **Reset** to clear the filter options.
  - ii) Amend filter selections.
  - iii) Click **Run** to confirm your selections and generate the report.



The report will generate results, starting with the most recent events and working backwards.

### 6.3.1 Report results

Reports with less than 1000 rows are displayed on screen. These results can also be viewed offline using the **Export to CSV** or **Email...** options

<b>Category</b>	Severity category of Event.
<b>Timestamp</b>	Time of Event.
<b>Source</b>	Hardware that captured the Event.
<b>Event Type</b>	Provides details about the event.
<b>Estate</b>	The Estate where this Event was recorded.
<b>Block</b>	The Block where this Event was recorded.
<b>Flat</b>	The Flat where this Event was recorded.



<b>Controller</b>	The Controller that reported the Event.
<b>Door</b>	The Door associated with the Event.
<b>Keyholder</b>	The name of the Keyholder associated with the Event.
<b>Key Colour</b>	The Key Colour associated with the Event.

### Large Reports

- Results are limited to a maximum of 40000 rows.  
**Rerun** the report with more filter options to reduce the results.
- Results with 1000–40000 rows can be saved as a CSV file or sent as an email attachment.
- Click **Export to CSV** to save locally or click **Email...** to send as an attachment.

### View offline results

- When the report results **exceed 1000 rows** this message will appear:

The report is too big to view on the web page or to print, but you can download it to view offline.

*The report is too big to view on the web page or to print, but you can download it to view offline.*

- When the report results **exceed 40000 rows** this message will appear:

• Search was cancelled having exceeded 40000 events. Results may be incomplete. Please refine your search and try again.

*Search was cancelled having exceeded 40000 events. Results may be incomplete. Please refine your search and try again.*

- When the **user has cancelled** the report this message will appear:

• Search cancelled by user. Results may be incomplete.

*Search cancelled by user. Results may be incomplete.*



To view results offline, click **Export to CSV** to save locally or click **Email...** to send as an attachment.

### 6.3.2 Export to CSV

Follow the steps below to export this table to a CSV file.

- Click **Export to CSV** from the tool bar.
- Select your save location and filename.
- Click **Save** to create the file.
- The CSV file can be opened with appropriate software e.g. Excel.

### 6.3.3 Email...

Follow the steps below to send an email:

- Click **Email...** from the tool bar.
- Input the recipient email address.



Please check the email address is valid.


- Click **Send** to confirm the details and send an email or click **Cancel** to return to Reports page.
- To download the results click **Export to CSV** located at the bottom of the results.

## 6.4 Tools

These tools will help to administer system data.

<b>Categories</b>	Create and manage Categories for Staff Members.
<b>Service Log</b>	Add system notes for any event that is not automatically generated e.g., a maintenance visit.
<b>Import Data</b>	Import multiple records for various system elements.
<b>Bulk Add Tenants</b>	Enter one or more records into a table and then add them all at the same time.
<b>Bulk Add Staff</b>	Enter one or more records into a table and then add them all at the same time.
<b>Noticeboard</b>	Upload notices that are displayed to your Tenants.
<b>Activity Log</b>	View the system administration audit logs.

### 6.4.1 Categories


 Max. length is 64 characters.

This field accepts free text and is used when adding or updating Staff Member records.

To add a new **Category** follow the steps below.

1. Select **SYSTEM > Tools > Categories** from the navigation menu.
2. Click **Add** to create a new category.
3. To update a category, overwrite the value to be changed.
4. Click **Delete** next to the category to be removed.
5. Choose one of these options to continue:
  - Click **Save** to confirm all changes and return to the previous list.
  - Use the **Navigation Path** to return to the previous list.

### 6.4.2 Service Log

 Each entry is permanent and cannot be deleted or edited.  
Max. length is 1024 characters per entry.

The initial view shows all previously added Service Logs. Please use this area to include notes that are relevant to your Estate which are not automatically captured by the System Reports or Events.

<b>Date</b>	Record of the date when the Service Log was added.
<b>Time</b>	Record of the time when the Service Log was added.
<b>Operator Name</b>	Record who added the record.
<b>Description</b>	Free text note added by Operator.

To add a new Service Log follow the steps below.

1. Select **SYSTEM > Tools > Service Log** from the navigation menu.
2. To enter a new Service Log click **+ Add New**.
3. Type in the New Entry box the relevant details up to 1024 characters.

4. Choose one of these options to continue:

- Click **Add** to confirm all changes and return to the previous list.
- Use the **Navigation Path** to return to the previous list.

### 6.4.3 Import Data

Use this tool to import multiple records, via a Comma Separated (CSV) file. When you select an item from the drop-down list, the file format will be explained and a simple example is shown.



Please remember that when importing Blocks and Tenants, the Properties they belong to must exist. The record will not be created if there is no Estate for a Block etc.

To import data follow the steps below.

1. Select **SYSTEM > Tools > Import Data** from the navigation menu.
2. Select the required **Import File Type** from the drop-down list.

**Please read the on-screen instructions.**



File format is described stating which fields are optional.

- An example is provided in RED text which can be copied into a text or CSV editor to help you create a new import.

3. Click **Browse** to search for your CSV file.
4. Click **Import** to upload the file.
5. Any messages will appear in the top part of the page.  
If there are any errors please correct the CSV file and try the import step again.
6. Choose one of these options to continue:
  - Click **Import** to import more records.
  - Use the **Navigation Path** to return to the previous list.

### 6.4.4 Bulk Add Tenants

This is a time-saving function so that multiple Tenant records can be added in one action.

<b>Flat</b>	<b>Estate</b>	Shows the Estate this Tenant resides in.
	<b>Block</b>	Shows the Block this Tenant resides in.
	<b>Flat</b>	Shows the Flat this Tenant lives in.
<b>Key Code</b>		The Key Code of the key for this Tenant.
<b>Name</b>		The name of the Tenant.

To add Tenant records follow the steps below:

1. Select **SYSTEM > Tools > Bulk Add Tenants** from the navigation menu.

#### + Add Tenant Record

Repeat these steps for each Tenant record to be added.

- i) To add new row click **+ Add Tenant Record**.  
This will add a new row with the previous Estate, Block and Flat populated but these selections can be changed if required.
- ii) Select the **Estate** from the first drop-down list.
- iii) Select the **Block** from the second drop-down list.
- iv) Select the **Flat** details from the drop-down list.
- v) Type in the **Key Code** (required).
- vi) Type in the Tenant **Name**.

2. When all records have been added click **+ Add All Tenants** to save these details.
3. Use the **Navigation Path** to return to the previous list.

### 6.4.5 Bulk Add Staff

This is a time-saving function so that multiple Staff records can be added in one action.

<b>Estate</b>	Shows the Estate this Staff Member has access to.
<b>Key Code</b>	The Key Code of the token for this Staff Member.
<b>Last Name</b>	Surname of the Staff Member.
<b>First Name</b>	Forename of the Staff Member.

To add Staff records follow the steps below:

1. Select **SYSTEM > Tools > Bulk Add Staff** from the navigation menu.

#### + Add Staff Record

Repeat these steps for each Staff record to be added.

- i) To add new row click **+ Add Staff Record**.  
This will add a new row with the previous Estate populated but this selection can be changed if required.
  - ii) Select the **Estate** from the first drop-down list.
  - iii) Type in the **Key Code** (required).
  - iv) Type in the Staff **Last Name**.
  - v) Type in the Staff **First Name**.
2. When all records have been added click **+ Add All Staff** to save these details.
  3. Use the **Navigation Path** to return to the previous list.

### 6.4.6 Noticeboards

This function enables Noticeboards to be added to an Estate or Block so that it can be displayed to the Residents in the common areas where SMART TVs are available.



Noticeboards are stored on the Gateway that manages the Block and displayed on a SMART TV that is connected to the same LAN or connected directly to the Gateway.  
Slide display order is alphanumerically sorted based on the image filename.

<b>Estate</b>	The Estate where the Noticeboard will be available.
<b>Block</b>	The Block where the Noticeboard will be available.
<b>Slides</b>	The number of slides to be displayed in the Noticeboard.

### 6.4.7 Add a new Noticeboard

To add Noticeboards follow the steps below:

1. Select **SYSTEM > Tools > noticeboards** from the navigation menu.
2. Click **+ Add New** to create a new **Noticeboard**.
3. Select **Estate** from the drop-down list.
4. Select a **Block** from the drop-down list or leave "- All -" for all Blocks.
5. Type the **Dwell Time** to the required number of seconds or use the up and down arrow buttons.  
The **Dwell Time** range is 0–60 seconds.

6. Click **Browse** to select the slides require from the Noticeboard.




Multiple files can be selected by holding CTRL when click on the file in Windows.  
The image thumbnails indicate the 'play' order of the slides starting from the top left.

7. Choose one of these options to continue:

- Click **Save** to confirm all changes and return to the previous list.
- Use the **Navigation Path** to return to the previous list.

### 6.4.8 Edit a Noticeboard

1. Click **Edit**  next to the item to be updated.
2. Optional: Use the filter options to find the relevant Noticeboard.
3. Optional: Amend **Dwell Time**.
4. Optional: Add new slide content via **Select Slide(s)**.
5. Optional: Click **check-box** in top left corner of a slide to mark it for deletion.
6. Choose one of these options to continue:
  - Click **Save** to confirm all changes and return to the previous list.
  - Use the **Navigation Path** to return to the previous list.

#### Useful tips

- Each Noticeboard can host a maximum of 10 files (slides).
- Each slide can only contain static images.
- Animations or special effects are not supported.
- The image proportions must be appropriate for the display resolution of the SMART TV.
- Supported file types are PNG and JPG/JPEG only.

#### General Tips

- Consider the viewing distance of residents from the SMART TV and check that any content is readable from a minimum of at least 1–2m depending on the lobby size.
- Any movie, video or sound based content will not play.
- Slide display order is managed by the slide filename.

#### Changing slide order

To change the order slides are displayed:

1. Remove the Noticeboard from Housing Central.
2. Amend the filenames as required.
3. Upload to Housing Central.

### 6.4.9 Activity Log

The initial view shows all previous Activity Logs.

<b>Date</b>	Record of the date when the Service Log was added.
<b>Time</b>	Record of the time when the Service Log was added.
<b>Operator Name</b>	Record who added the record.
<b>Description</b>	Free text note added by Operator.

To select Activity Logs follow the steps below.

1. Select **SYSTEM > Tools > Activity Log** from the navigation menu.
2. Click **Filter** to reduce the number of logs that are displayed.
  - i) Use the date pick list to indicate a **From** (start) or **To** (end) date.
  - ii) Type the full **Operator** name or use a few letters from the name (wild card not needed) to only see logs by Operators who match.
3. Click **Apply Filters** to confirm your selections and view the results.
4. To change the results view click **Filter** and edit your selections.
5. To clear the filters click **Reset**.
6. Use the **Navigation Path** to return to the previous list.



## Contacts

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