

Web-Hosted Facility Access Control Systems Powered by Brivo®

Account Quick Start Guide



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*Information in this manual is subject to change.
To download the latest version, log into your account and click "Help."*

1. Log In

- ▶ Open a Web browser¹ and go to www.brivo.com.
- ▶ Click “Customer Login.”
- ▶ Enter your Administrator ID and Password, then click “Log In.” *Tip! After logging in, click the “Help” icon for more info on any topic!*

2. Create a Site and Add Doors

A Site is a logical group of Doors. A Site can represent a building or part of a building.

- ▶ Go to the “Sites/Doors” section, then click “New Site.”
- ▶ Enter the name and address of the Site, then click “Add Site.” *The Site name should be brief and descriptive, such as “Chicago Office” or “Chicago Store #123.”*
- ▶ On the next screen, enter a Door name and the corresponding data from your **Installation Worksheet**, then click “Add Door.” *The Door name should be brief and descriptive, such as “Front Door” or “Server Room.”*
- ▶ To add another Door, click “Add another Door to this Site” on the confirmation screen.

*Note! To edit Advanced Door Settings, such as the “Door Ajar” threshold, click “Sites/Doors,” then click the Site name, then click the Door name, then click “Advanced Door Settings.” Copy the data from your **Installation Worksheet**, then click “Save.”*

3. Add Cards²

A Card is a proximity card, magnetic stripe card, or smart card. Cards are listed in the Card Bank.

- ▶ Go to the “Cards” section, then click “Add Cards.”
- ▶ Copy the data from your **Installation Worksheet**, then click “Add Cards.” *Tip! Before adding a range of Cards, add one or two, then assign them to Users, then test them (see below).*

Note! A Card is active only when it belongs to a User (see below).

4. Create a Schedule

A Schedule is a time template that specifies when access is permitted on each day of the week or on a Holiday.³

- ▶ Go to the “Schedules” section, then click “New Schedule.”
- ▶ Enter a brief, descriptive name, such as “Mon-Sat 8AM-8PM.” *The Schedule name should describe what the Schedule looks like.*
- ▶ Use your mouse to “paint” blocks of time (a green block indicates access is allowed), then click “Save.” For detailed instructions, click “Help” inside the Schedule window.

Note! A Schedule takes effect when applied to a Group or Groups via “Group Privileges.” (see below).

5. Create a Group

A Group is a group of Users with the same access privileges.

- ▶ Go to the “Users/Groups” section, then click “New Group.”
- ▶ Enter a descriptive name, such as “Chicago Staff,” then click “Add Group.”
- ▶ On the next screen, apply a Schedule to each Door the Group can access. *In the following example, the Group “Chicago Staff” has privileges to access “Front Door” and “Server Room” at “Chicago Office”:*

Chicago Staff / Edit Group Privileges		
Site	Door	Schedule
Chicago Office	Front Door	(Always Access)
Chicago Office	Server Room	Mon-Fri 9AM-5PM
Chicago Office	Supply Room	(No Access)

Tip! Create as few Groups as possible to achieve the desired effect. Every Group should have a unique combination of privileges.

6. Add a User to the Group

A User is a person who requires access to one or more Doors. A User must belong to a Group.

- ▶ Go to the “Users/Groups” section, then click “New User.”
- ▶ Enter the User’s name; select a Group or Groups⁴ (the User will inherit privileges from these Groups); create a PIN⁵; enter a Card number⁶; enter optional information in the Custom Fields; then click “Add User.” *For example:*

New User

First Name:	<input type="text" value="Jacob"/>	Department:	<input type="text" value="Engineering"/>
Last Name:	<input type="text" value="Green"/>	Parking Space:	<input type="text" value="109"/>
Group(s):	<div style="border: 1px solid gray; padding: 2px;"> Chicago Staff Chicago Managers Denver Staff Denver Managers </div> <small>(Ctrl-click or Apple-click to select multiple)</small>	License Plate:	<input type="text" value="J78R12"/>
PIN:	<input type="text" value="44817"/> 4 ... 5 ... 6 ... 7 ... 8 ...	Hire Date:	<input type="text" value="1/29/03"/>
Card #:	<input type="text" value="3501"/> Select ...	Emer. Phone:	<input type="text"/>
Fingerprint:	Enroll ...	Custom 6:	<input type="text"/>
Effective From:	<input type="text" value="2/1/03"/> To: <input type="text"/>	Custom 7:	<input type="text"/>
	<input type="button" value="Add User"/>	Custom 8:	<input type="text"/>
		Custom 9:	<input type="text"/>
		Custom 10:	<input type="text"/>

7. Test the User’s Credentials

- ▶ Wait five minutes for the data to be downloaded to the appropriate control panels.
- ▶ Walk up to a Door and present the User’s Card or PIN (press “#” after entering a PIN). *Make sure the User belongs to a Group that has privileges to access that Door at that time!*
- ▶ Go to the “Activity” section (the first screen in this section is the “Activity Log”). You should see an access event by that User⁷:

Date/Time	User/Event	All Sites	Door/Device
2/1/03 3:45 PM EST	Jacob Green	Chicago Office	Front Door

8. Create an E-mail Notification Rule

- ▶ Go to the “Notifications” section, then click “New Notification Rule.” If there are multiple Sites, you will be prompted to select a Site to which the Rule should apply.
- ▶ Enter a brief description, such as “Chicago Alarms.”
- ▶ Enter one or more e-mail addresses separated by commas. *Tip! E-mail Notifications can be sent to cell phones and pagers! See “Cell Phone Reference” in the online Help Center for more info.*
- ▶ Select the appropriate events, then click “Save.” *For example:*

New Notification Rule

Description:

Recipients:
(Enter e-mail addresses separated by commas)

Applies to Site:

Exception Events:

- Door Ajar/Door Ajar Cleared
- Door Forced Open
- Too Many Invalid PINs
- Door Locked by Keypad
- Door Unlocked by Keypad

9. Create a Senior Administrator or Assistant Administrator

Senior Administrators can operate on all account data and can create other Administrators. Assistant Administrators can operate on certain Site and Group data as determined by the Master Administrator or a Senior Administrator, but cannot create other Administrators.

- ▶ Go to the “Account” section (the first screen in this section is “Administrators”), then click “New Administrator.”
- ▶ Enter the Administrator’s name and contact information.
- ▶ Select “Senior Administrator” or “Assistant Administrator.”
- ▶ Create a password for the Administrator, then click “Save.”
- ▶ If you selected “Assistant Administrator,” you will be prompted to select permissions on per-Site and per-Group basis. *This process requires careful planning. Please refer to the “Administrators” section of the online Help Center for further instructions.*

10. Change Your Password

Finally, change the password that was created for you by your dealer.⁸

- ▶ Go to the “Account” section, then click “Password.”
- ▶ Enter your new password *twice*.
- ▶ Enter your old password, then click “Save.”

Tips!

Your password should include a combination of letters and numbers.

Do not use whole words. Avoid references to family names, nicknames, pet names and birthdays.

Do not share your password with anyone. If you write it down, store it in a secure location, such as a locked drawer or safe.

1. You can use any standard Web browser, version 5.0 or later, with a connection speed of 56Kbps or greater. We recommend Internet Explorer 5.0+, AOL 5.0+, Netscape 6.0+ and Opera 5.0+. The online interface uses cookies to preserve session information. If your browser disallows cookies, the interface will not function properly. The online interface uses JavaScript to validate form data, control navigation and display images. If your browser has "scripting" disabled, the interface will not function properly. Some functional elements require the Flash Player, version 5.0 or higher. If Flash is not detected in your browser, you will be prompted to download it. Some functional elements appear in pop-up browser windows. If you have installed software that blocks pop-up windows, the interface will not function properly.

2. This step applies to accounts with Card Readers or Dual Readers.

3. A Holiday is a period of time during which Schedules refer to their Holiday override columns instead of to the day of week. For example, the Holiday named “Christmas Break” applies to “Chicago Office: Front Door” between Wed., Dec. 25, 2002 12:00 AM and Thu., Dec. 27, 12:00 AM. All Schedules in effect at “Front Door” during this period will refer to their respective Holiday override columns. In addition, the Door Timer for “Front Door” will be suspended for the duration of the Holiday. For more information about Holidays, please see “Creating and Editing a Holiday” in the online Help Center; for more information about setting a Door Timer, please see “Setting the Door Timer.”

4. Multiple Group membership requires *all* control panels in the account to be series 4000 or higher.

5. PINs can be used at Keypads and Dual Readers. Click 4..., 5..., 6..., 7... or 8... to generate a random PIN of 5 to 8 digits in length.

6. Cards can be used at Card Readers and Dual Readers.

7. Allow a few seconds for the transaction to appear in the Activity Log. Occasionally, network latency may cause delays of up to a few minutes.

8. You will also be prompted to create a “Secret Question and Answer,” which can be used to verify your identity if you forget your password or request technical support.