OPENPATH
ACCESS CONTROL SYSTEM
USER GUIDE FOR
ADMINISTRATOR WEB PORTAL
V1.9

# **Table of Contents**

Openpath Admin Portal User Guide NEW FEATURES | APRIL 2019 **GETTING STARTED TERMINOLOGY LOGGING IN** DASHBOARD MAIN DASHBOARD HARDWARE DASHBOARD **USERS USER MANAGEMENT CREATE USER IMPORT USERS ISSUE CREDENTIALS CREATE A MOBILE CREDENTIAL** ADD A WIEGAND CREDENTIAL **USER ACCESS USER SECURITY** MANAGING USERS **GUEST ACCESS LINKS AND WEBHOOK URLS GROUP MANAGEMENT CREATE GROUPS ROLE MANAGEMENT CREATE ROLES SCHEDULE MANAGEMENT CREATE SCHEDULE MULTIPLE SCHEDULES SITES** SITE MANAGEMENT **CREATE SITES ZONE MANAGEMENT ZONE SHARING CREATE ZONE ANTI-PASSBACK RESET ANTI-PASSBACK** MULTIPLE AREA ANTI-PASSBACK **ENTRY MANAGEMENT CREATE ENTRY ENTRY SETTINGS ENTRY BEHAVIOR ENTRY/EXIT HARDWARE OPENPATH READER REQUEST TO EXIT CONTACT SENSOR** WIEGAND DEVICE ADD CONTROL **ENTRY SCHEDULES** 

```
ENTRY STATE MANAGEMENT
      CREATE ENTRY STATE
HARDWARE
   ACU MANAGEMENT
      ADD ACU
   READER MANAGEMENT
      ADD READER
REPORTS
   ACTIVITY LOGS
   USER ACTIVITY AND ENTRY ACTIVITY
INTEGRATIONS
   IDENTITY PROVIDERS
      GOOGLE G SUITE
      MICROSOFT AZURE ACTIVE DIRECTORY
      OKTA
      SINGLE SIGN-ON
      MANUALLY SYNC
   INBOUND WEBHOOKS
   OUTBOUND WEBHOOKS
      SUBSCRIPTIONS
      HOOK ACTIONS
   OTHER INTEGRATIONS
ADMINISTRATION
   ORGANIZATION DETAILS
   BILLING
   ALERT SETTINGS
   QUICK START
MY PROFILE
USER DATA MODEL
CONFIGURING OPENPATH WITH LEGACY SYSTEMS
REGULATORY
```

# Openpath Admin Portal User Guide

# **NEW FEATURES | APRIL 2019**

- Export data to CSV files from most tables in the Control Center (for example, see <u>USER MANAGEMENT</u>). Tables are now re-sizable by clicking and dragging the sides of columns.
- Activity Logs now have a Denied Reason column that provides details on why access attempts are denied. See <u>ACTIVITY LOGS</u>.
- You can link an Entry without hardware to an ACU. This is useful when paired with Outbound Webhooks, Subscriptions, and Hook Actions to trigger custom integrations.

# **GETTING STARTED**

The Openpath Control Center is an online portal where Administrators can configure the Openpath Access Control system through an Internet browser. This user guide will explain how to get started in the Control Center, manage users and hardware, and provide access to your Entries.

# **TERMINOLOGY**

- Smart Hub ACU: A cloud-based control panel that manages access to a secured area.
- **Cloud Key Credential:** A credential that lets users generate links to provide temporary access through the Openpath Mobile App or through the Control Center.
- **Control Center:** An online portal that lets administrators manage users, set up Entries and permissions, and troubleshoot hardware.
- **Credential:** A key presented to a reader to gain access to an Entry. Examples include cards, key fobs, and mobile credentials.
- **Entry:** A door, gate, turnstile, or elevator floor secured with a reader.
- **Entry State:** Determines whether an Entry is locked or unlocked and defines what kinds of credentials and trigger methods are valid.
- **Mobile Credential:** An access method tied to a user's smartphone through the use of the Openpath Mobile App.
- **Openpath Mobile App:** Used for providing mobile credentials and remote unlock for users. The app is available for iOS and Android devices.
- **Remote Unlock:** A feature that lets users unlock an Entry via the Openpath Mobile App without needing to be in range of the Reader.
- **Request to Exit:** A sensor that detects when someone is exiting an Entry which lets the Smart Hub ACU know to unlock the door.
- **Schedule:** A set of defined dates and times that can be used to restrict access to Entries or users.
- **Site:** A physical location (usually a building) that contains Zones and Entries.

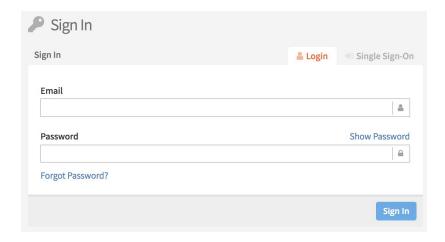


- **Smart Reader:** A device installed near an Entry capable of reading information stored on key cards, fobs, and Openpath mobile credentials.
- Trigger Method: A combination of credential type and 1FA/2FA
- User: A person defined in the Control Center with credentials.
- **Wiegand Reader:** A device installed near an Entry capable of reading information stored on a Wiegand card and transmitting to an access control unit.
- **Zone:** Contains one or more Entries within a Site. Zones are the units of physical access permissions that you assign to users and groups.
- **1FA**: Single-Factor Authentication.
- **2FA**: Two-Factor Authentication.

# **LOGGING IN**

- 1. Go to <a href="https://control.openpath.com/login">https://control.openpath.com/login</a>
- 2. There are two ways to log in. If you received admin credentials through Openpath, use the **Login** tab. In order to use the **Single Sign On** (SSO) tab, your organization must have enabled the feature when setting up <u>GOOGLE G SUITE</u> or <u>MICROSOFT AZURE ACTIVE DIRECTORY</u>

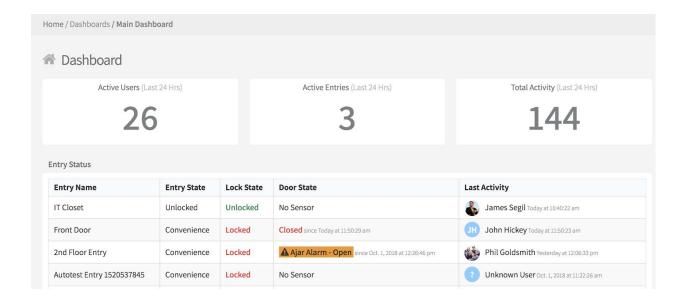
**Note:** If you try logging in via SSO and get an error asking for your namespace, that is because your organization has enabled SSO for two or more identity providers. Ask the admin who set up the identity provider integrations for the correct namespace to use. See also <u>USER DATA MODEL</u>.



# DASHBOARD

# MAIN DASHBOARD

Once logged in, you will see the home screen where the Dashboard shows the latest Entry statistics.



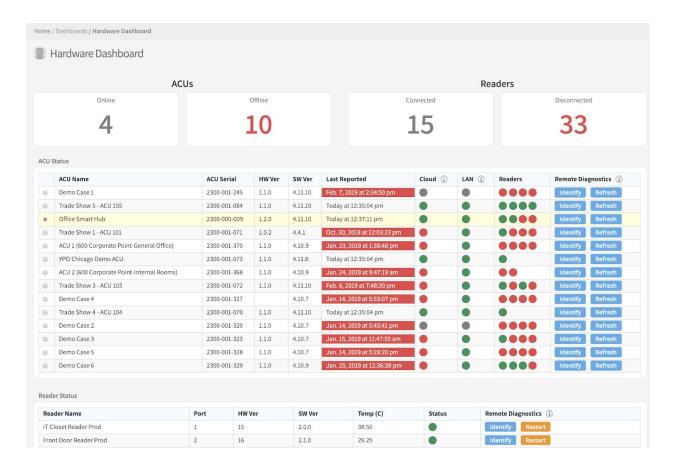
On the Main Dashboard, you can quickly see your organization's usage statistics as well as the current state for locks and Entries. The data on the Dashboard is real time, so as soon as an Entry unlock is made or denied or a lock state changes, the data displayed will update immediately.

**Note:** If a door is ajar or not properly closed, the Door Ajar alarm will be prominently displayed in the Door State column

# HARDWARE DASHBOARD

The Hardware Dashboard is where you can get a high level overview of your organization's Smart Hubs (ACUs) and readers.





Select an ACU to see its associated readers. Use **Remote Diagnostics** to assess and identify individual devices:

- **Identify**: Clicking this next to an ACU will cause the Status LED on the ACU to flash green. Clicking it next to a reader will cause the following:
  - o the reader's center dot light up green
  - o the reader's outer ring LED will light up and spin
  - o the reader's buzzer will beep several times
- **Refresh**: Refresh an ACU to send the latest data from the physical device to the Control Center.
- **Restart**: Restart a reader to force a reboot. This will interrupt services provided by the reader for up to 60 seconds.

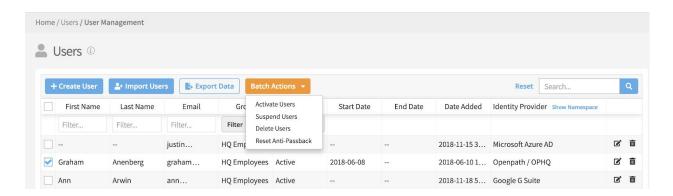
Remote Diagnostics is useful for verifying that the physical wiring matches the Control Center configuration.

# **USERS**

The Users tab lets you manage and import users, as well as create and define groups and roles for users.

# **USER MANAGEMENT**

The User Management screen is where you can view and manage users. You can export user data to CSV by clicking **Export Data**. Filters can be used on any of the columns to narrow down the users shown in the view.

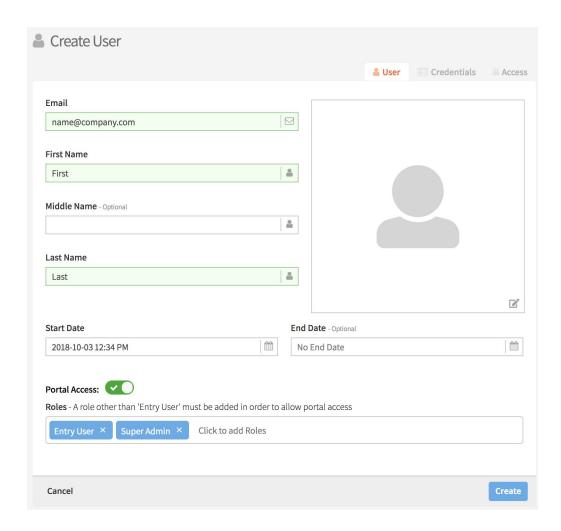


The Identity Provider column will list the master user database from where the users were created (within the portal, from Active Directory, G Suite, etc.). You can toggle this column to show the **namespace**. For more information, see USER DATA MODEL.

#### CREATE USER

- To create a new user, click the blue **Create User** button on the top left corner. Enter the user's name, work email address, and start/end date.
- If desired, upload a user photo, which will appear in the Openpath Mobile app.
- If the user is an admin and requires access to the web portal, click the **Portal Access** slide button and then add a **Super Admin** role.

**Note:** Only give portal access to users who require it, like an office manager or security guard.



### **IMPORT USERS**

In addition to creating individual users, you can also bulk import users via CSV. Under the Users tab, click Import Users (or from the User Management page, click the blue **Import Users** button). There you can upload a CSV file with your users' info. A sample CSV with the required fields is also included on the page. You can also import users by using a directory service integration. See <a href="INTEGRATIONS">INTEGRATIONS</a>.

#### ISSUF CREDENTIALS

Once you have created users, you can issue credentials. Credentials are what let users have access to Entries.

- To issue credentials, click on a user to go to their User Details, then click on the **Credentials** tab in the upper righthand corner.
- Select the type of credential you want to issue. Choose from:
  - o Mobile



- Cloud Key (used for providing Guest Access Links)
- o Card: Openpath/MIFARE (CSN) Fast
- Card: Openpath DESFire (Encrypted) Secure
- o Card: Wiegand ID
- PIN Code (this option requires a non-Openpath reader)
- Enter the required information then click **Create**.

#### CREATE A MOBILE CREDENTIAL

After you create a mobile credential, click **Send** to send an email instructing the user to set up their mobile device as a credential.

#### ADD A WIEGAND CREDENTIAL

If you're adding a Wiegand credential, you need to specify the card format. If you're unsure of the card format, you can use the Raw 64-bit option and enter the card number. If you're unsure of the card number, you can swipe the card at the reader and take note of the rejected access Entry under Reports > Access Logs. The card number will be displayed under the Details column.

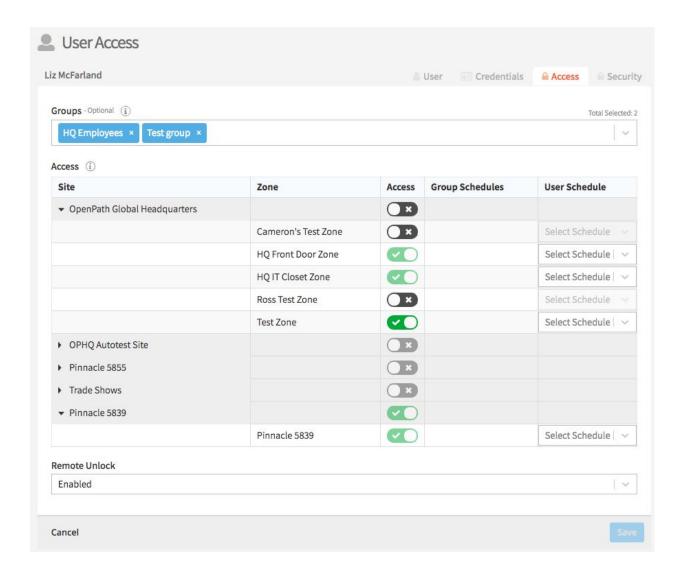
If you'd like to send card credential data to a third-party control panel, set **Use for Gateway** to **Enabled**. You must also configure the Wiegand reader to enable this feature. See <u>WIEGAND DEVICE</u>.

#### **USER ACCESS**

The Access tab on the User Details page is where you can assign groups, Sites, and Zones, as well as enable Remote Unlock for a user.

- Use the **Groups** field to add a user to a group and give them access to Zones available for that group. See <u>CREATE GROUPS</u>.
- Alternatively, you can manually assign access to Sites and Zones by using the toggle buttons.
- Enabling **Remote Unlock** for the user will let them unlock a door remotely (i.e. physically outside of Bluetooth range of the door reader) using the mobile app.
- The **Group Schedules** column will display any applicable Group Schedules if you assigned a group with a schedule.
- The User Schedule column lets you assign user-specific schedules. See <u>SCHEDULE</u> MANAGEMENT.





#### **USER SECURITY**

The Security tab is where you can manage Multi-Factor Authentication (MFA) credentials. You cannot add MFA credentials for other users – only view and delete. You can add a MFA credential for yourself under MY PROFILE.

# MANAGING USERS

From the User Management screen, use the checkboxes and **Batch Actions** to change the status of individual or multiple users:

- Activate Users: reactivates a suspended user
- **Suspend Users**: disables mobile app usage and admin portal access (if granted to the user)
- **Delete Users**: revokes access from the user but still keeps the user in the system for reporting and record keeping purposes



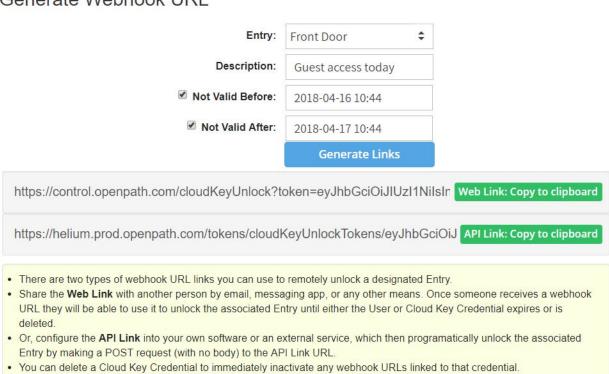
 Reset Anti-Passback: if using Anti-Passback, resets a user's Anti-Passback state. See ANTI-PASSBACK.

# **GUEST ACCESS LINKS AND WEBHOOK URLS**

Users with Cloud Keys can share temporary Guest Access Links and generate webhook URLs. Webhook URLs can be used to open Entries via a web browser or integrated into software or external services.

- To generate links, click on a user to go to their User Details, then click on the Credentials tab in the upper righthand corner. Next to the cloud K=key credential, click **Get Webhook URL**.
- A window will pop up where you can select which Entry the URL will unlock. Choose the Entry and valid dates/times, then click **Generate Links**.
- Use the Web Link for sharing access with a person; use the API Link for your own software or other external service.

# Generate Webhook URL

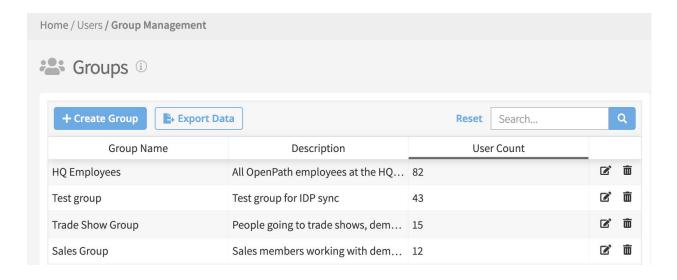


**Note:** A Cloud Key can have multiple webhooks for multiple Entries associated with it. Deleting a cloud key credential will also remove all the valid webhooks associated with it.



# **GROUP MANAGEMENT**

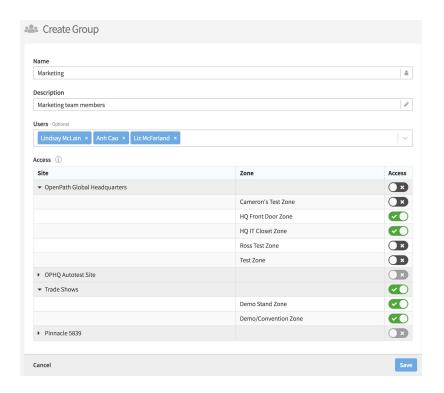
The Group Management page is where you can create and manage groups for users. Groups let you assign access and Entry permissions for one or more users, and they're useful for organizing your user base by department or role. You can export group data to CSV by clicking **Export Data**.



# **CREATE GROUPS**

- To create a new group, click the blue **Create Group** button on the top left corner. Enter a name, description, and assign users.
- Next, select which Sites and/or Zones this group will have access to.
- When you have finished, click the blue **Save** button to save your new group.



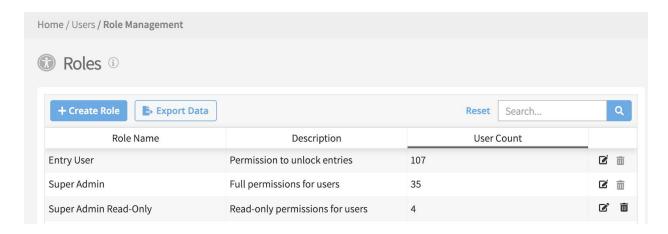


# **ROLE MANAGEMENT**

A role is a set of portal access permissions that can be assigned to users. There are two default roles that cannot be edited:

- **Entry User** all users are automatically assigned this role upon creation. This role is required for letting users open Entries via the mobile app.
- **Super Admin** gives full portal access with edit permissions.

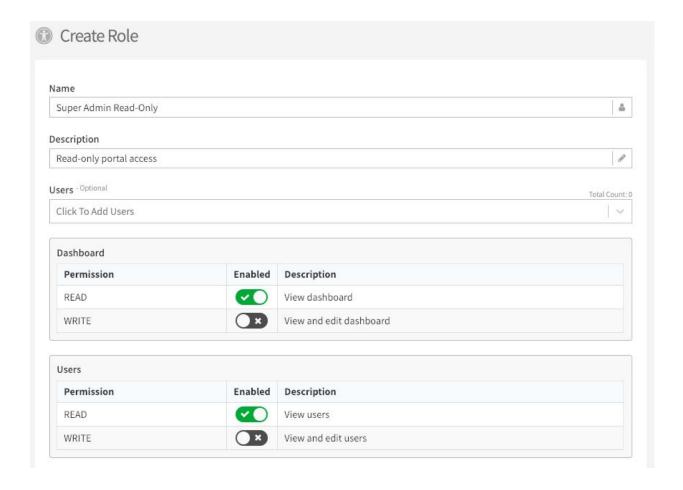
**Note:** Users with the Super Admin role can assign and revoke portal access for other users.



# **CREATE ROLES**

- To create a new role, click the blue **Create Role** button on the top left corner. Enter a name, description, and assign users.
- Select the permissions you'd like this role to have, then click the blue **Save** button in the lower right corner.

**Note:** You can assign multiple roles to the same user. The user's permissions will be cumulative across all assigned roles.

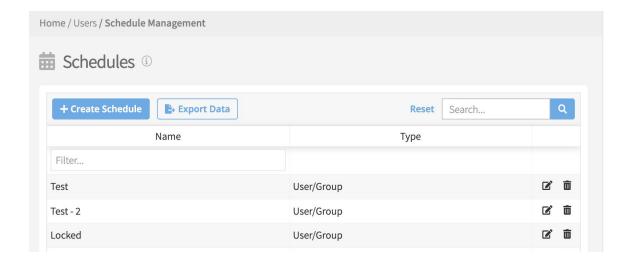


# SCHEDULE MANAGEMENT

Schedule Management is where you can define schedules for users and groups. User and Group Schedules are useful if you want to restrict access or trigger methods for certain users/groups. For example, you can define normal business hours for employees or require that certain users only use key cards.



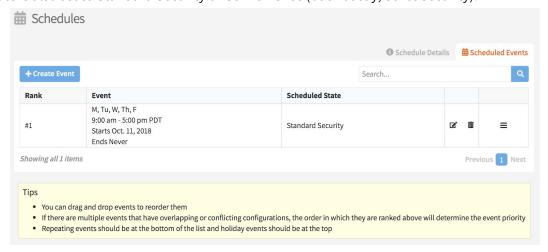
You can export schedule data to CSV by clicking **Export Data**.



### **CREATE SCHEDULE**

- To create a user/group schedule, click the blue **Create Schedule** button on the top left corner. Enter a name, then click **Save**.
- Next, click on the **Scheduled Events** tab to define the schedule. Click the blue **Create Event** button.
- Choose between a **Repeating Event** and a **One-Time Event**. In this example, we're creating a normal business hours schedule, so we'll define a Repeating Event.
- Enter a Start and End Time, choose a Time Zone, and select which days this event will occur.
- Enter a Start Date and End Date (optional), and set the Scheduled State.

**Note:** A user/group schedule cannot be more permissive than what the Entry allows. In this example, we've defined the Scheduled State as "Standard Security" which only works if the Entry state is also set to Standard Security or Convenience (but not say, Strict Security).



# **MULTIPLE SCHEDULES**

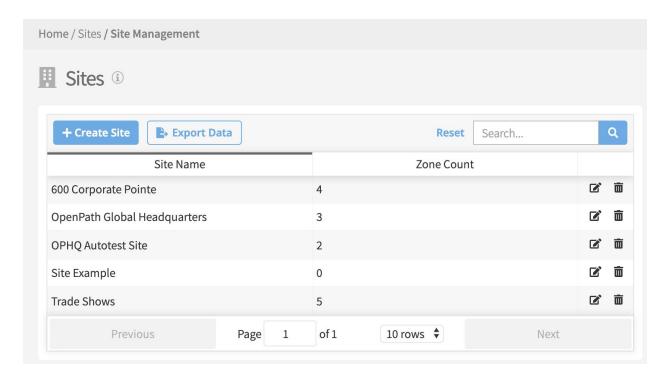
You can assign multiple user/group schedules to users/groups. Access is cumulative of the assigned schedules. For example, if a user has a group schedule that gives access 9:00 am to 5:00 pm and a user schedule that gives access 3:00 pm to 9:00 pm, then that user will have a combined access of 9:00 am to 9:00 pm.

# SITES

Sites are physical locations (like office buildings) comprised of Zones and Entries. You should create a Site for every location where you have Openpath installed.

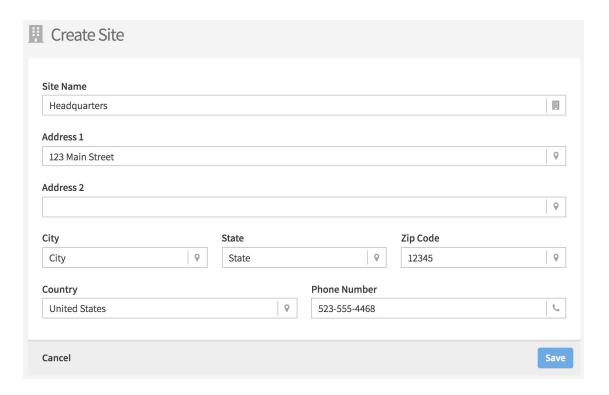
# SITE MANAGEMENT

The Site Management page is where you can view and manage Sites. You can export Site data to CSV by clicking **Export Data**.



# **CREATE SITES**

- To create a new Site, click the blue **Create Site** button on the top left corner. Enter a **Site Name** and click **Add Site Details**.
- Enter the address and a phone number for the Site and click the blue **Save** button.

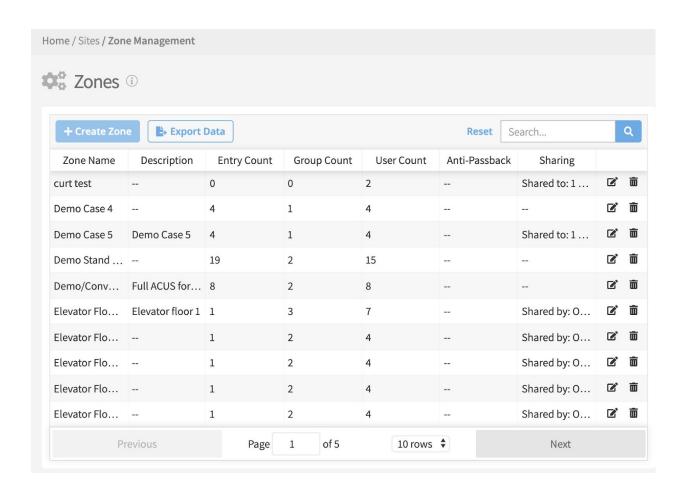


# **ZONE MANAGEMENT**

The Zone Management page is where you can view and manage Zones. Zones are groups of one or more Entries that you can assign to Sites. Zones are useful for breaking up large Sites into smaller areas like floors or common areas (in multi-tenant scenarios). Most significantly, Zones are the units of physical access permissions that you assign to users.

You can export Zone data to CSV by clicking **Export Data**.





### **ZONE SHARING**

Zones can be shared between multiple Openpath customers. This is useful if you're a landlord who wants to share a Zone of common Entries with multiple tenants. Recipients cannot edit shared Zones.

# **CREATE ZONE**

- To create a Zone, click the blue **Create Zone** button in the top left corner.
- Enter a name and description (optional) and select the Site to which the Zone will be assigned.

**Note:** A Zone can only be assigned to one Site, but a Site can have multiple Zones assigned to it.

- Next, add User Groups and Users to the Zone (optional).
- If you want to share this Zone to a different Organization, enter the Org ID(s) (optional).
- Click the blue **Create** button to save your new Zone.

#### ANTI-PASSBACK

Anti-Passback lets you define a sequence in which Entries must be accessed in order to gain Entry. Sequences are defined using **Areas** – each Area contains a set of inbound and outbound Entries. For each Area, after every successful inbound Entry the user must exit through an outbound Entry before entering an inbound Entry again. This feature is commonly used with parking gates and helps prevent users from sharing credentials with other users.

- To set up Anti-Passback on a Zone, click on the Zone to edit it, then click on the Anti-Passback tab in the upper righthand corner.
- Enter an **Expiration** time in seconds after which the Anti-Passback state will reset for the user.
- Enable **Reset Anti-Passback Periodically** to configure a schedule during which a user is not limited to Anti-Passback logic until after their second unlock attempt.
- Enable **Use Contact Sensor** to only change a user's Anti-Passback state until after the Contact Sensor reports open.
- Enable **Shared-To Orgs Can Reset Anti-Passback** if you want orgs sharing this Zone to have permission to reset Anti-Passback for their users.
- Lastly, define the Area(s) within the Zone to be enforced by Anti-Passback.
  - o Enter a name.
  - Set the **Inbound Mode** and **Outbound Mode**, which determines how the system reacts to Anti-Passback breaches:
    - None access is granted; no additional response
    - **Alert** access is granted and an event is generated
    - **Enforce** access is denied and an event is generated
  - Add Inbound and Outbound Entries.
    - **Note:** An Entry can only be used once within an Area, either as Inbound or Outbound but not both; however an Entry *can* be used in multiple Areas. In addition, all Entries within an Area must reside on the same ACU.
  - Click Add Area.
- Click Save.

Internally, the ACU tracks each user's most recent direction of movement (inbound or outbound) within each Area. When the user's most recent direction is known, then an attempt by that user to move in the same direction again will result in an Anti-Passback Breach event. When the user's most recent direction is unknown, as in the case of a newly created Area, or following a scheduled or manual Reset action, then the user's next movement will be allowed in either direction, after which normal rules will apply again.

Anti-Passback Breach events can trigger alerts. See <u>ALERT SETTINGS</u>. They can also be used to trigger custom integrations. See <u>OUTBOUND WEBHOOKS</u>.



**Note:** Anti-Passback logic also applies to cloud key credentials and other remote unlock methods. In general, you might not want to allow remote unlock methods on Zones with Anti-Passback enabled.

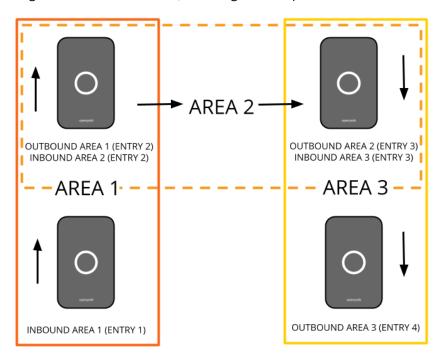
### RESET ANTI-PASSBACK

You can reset Anti-Passback in two ways: on the Zone level and on the user level.

- To reset Anti-Passback on the Zone level, go to Zone Management and click **Reset Anti-Passback** under the Anti-Passback column.
- To reset Anti-Passback on a user (or multiple users), see MANAGING USERS.

#### MULTIPLE AREA ANTI-PASSBACK

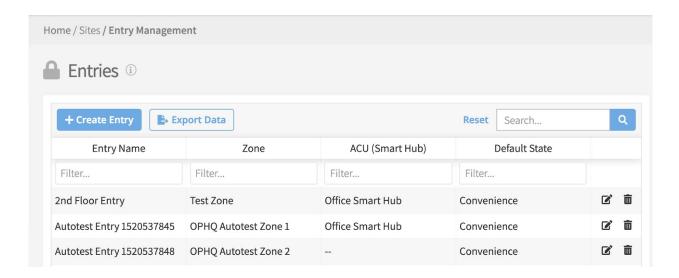
Most Anti-Passback scenarios will only require a single Area, but multiple Areas can be used to create multi-step sequences of Entry access. In this example, all four Readers reside on the same ACU and are configured across three Areas, resulting in a complex flow of movement.



# **ENTRY MANAGEMENT**

Entry Management is where you can add and manage Entries. Generally speaking, Entries are doors configured with Openpath Readers, but can also be gates, turnstiles, and elevator floors. You can export Entry data to CSV by clicking **Export Data**.

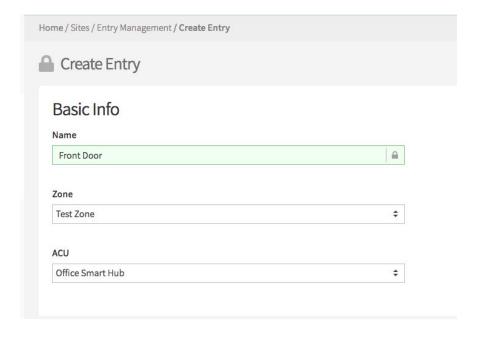




**Note:** It is likely that your Openpath installer may provision some or all of the following features for you during the installation process.

#### CREATE ENTRY

- To create a new Entry, click the blue **Create Entry** button in the top left corner.
- Enter a name and select the Zone (optional) and ACU to which this Entry belongs. Once you select an ACU, then more Entry settings will display.



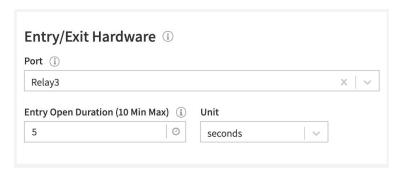
# **ENTRY SETTINGS**

#### **ENTRY BEHAVIOR**



Entry Behavior is where you set the Default State for the Entry. See **ENTRY STATE MANAGEMENT**.

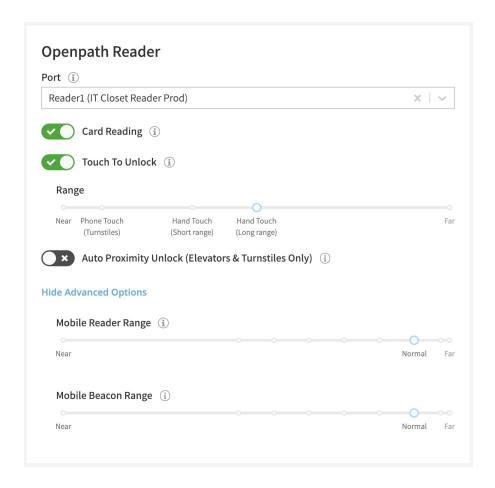
# ENTRY/EXIT HARDWARE



Entry/Exit Hardware is where you can select a relay to use on the ACU (or expansion board), like for controlling electric strikes or maglocks.

- **Port** select which port to assign the reader, from Relay 1-4. Technically, the electric strike is wired to one of the 4 ACU ports, and the reader is wired to the strike. You will need to select the ACU relay for which this reader/Entry is wired to the ACU.
- **Open Entry Time** enter a time for how long the Entry remains unlocked before reverting back to its default state.
- **Unit** select whether to use seconds or minutes.

#### **OPENPATH READER**



Associate the Entry with the Openpath Reader.

- **Port** select the port on the ACU to which the Openpath Reader is connected.
- **Card Reading** enable this to allow RFID/NFC cards at this reader.
- **Touch to Unlock** enable this to allow Touch Entry. Set the range using the slider.
- **Auto Proximity Unlock** enable this to unlock the Entry when a user with a valid mobile credential is in range of the reader. Set the range using the slider.
- **Show Advanced Options** toggle this to configure advanced range options for the Openpath Reader:
  - Mobile Reader Range the distance that the reader can detect a mobile phone that is in BLE range
  - Mobile Beacon Range the distance that the beacon can detect a mobile phone and "wakes up" the Openpath app

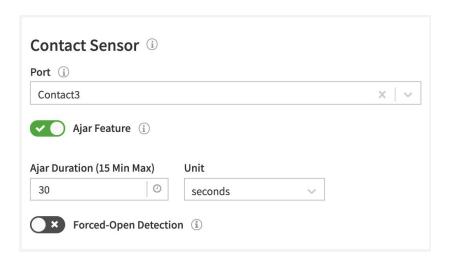
# **REQUEST TO EXIT**



Often, doors will have a Request to Exit button or sensor that will unlock the door from the inside.

- **Port** select the port for the Request to Exit device to which the Entry is wired.
- **Mode** this is an electrical term regarding how the Request to Exit device sends the command to the ACU. Your installer will be able to give you guidance on whether the Mode should be set to Normally Closed or Normally Open for a particular Entry configuration.

#### **CONTACT SENSOR**



A contact sensor is able to detect if an Entry is open.

- **Port** select the port for the contact sensor to which the Entry is wired.
- **Ajar Feature** if enabled, you can specify the maximum allowed time the door can be ajar before an event is generated indicating the door is ajar. If disabled, there will be no system action if the door is ajar.
- **Duration** the maximum allowed time the door can be ajar before events are generated.
- **Unit** select whether to use seconds or minutes.



• **Forced-Open Detection** – if enabled, an Entry opening without first unlocking through Openpath or triggering the REX will generate an event.

Contact sensor events can trigger alerts. See <u>ALERT SETTINGS</u>. They can also be used to trigger custom integrations. See <u>OUTBOUND WEBHOOKS</u>.

#### WIEGAND DEVICE



Openpath is compatible with legacy Wiegand Devices.

- **Port** select the port for the Wiegand Device to which this Entry is wired.
- **Mode** select the Mode to set which direction the card credential data is sent:
  - Use **Input** to receive data from devices such as an RFID reader or PIN code keypad.
  - Use Output (Gateway) to send credential data to a third-party control panel. See
     CONFIGURING OPENPATH WITH LEGACY SYSTEMS for more information.

#### ADD CONTROL

- If an Entry has more than one of any controls (Openpath Readers, Entry/Exit Hardware, Contact Sensor, Request to Exit, or Wiegand Device) installed, you can select which additional control(s) you would like to associate with the Entry.
- Once you add an additional control, it will appear in the relevant section on this page.



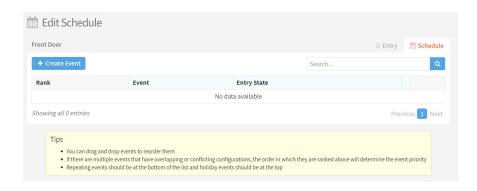
# **ENTRY SCHEDULES**

After creating an Entry, click the Entry to manage Entry Schedules. Scheduling allows for Entries to be in a specific state (e.g. locked, unlocked, etc) based on date and time. For example, an Entry

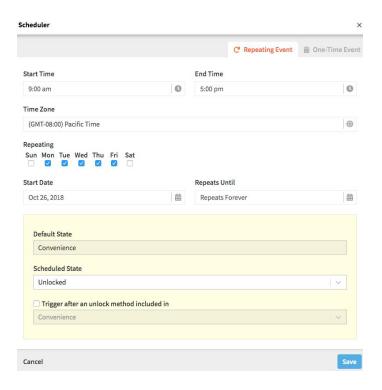


could be set to an unlocked state during normal business hours, Monday – Friday, for the relevant time Zone.

1. To assign a schedule, click on the Entry to edit it, then click on the **Schedule** tab in the upper righthand corner.



- 2. Click **Create Event** to create a new schedule for this Entry.
- 3. Choose between a **Repeating Event** and a **One-Time Event**.
- 4. Enter a Start and End Time, choose a Time Zone, and select which days this event will occur (if a Repeating Event).
- 5. Enter a Start Date and End Date (optional).
- 6. Set the Scheduled State and if desired, enable and set Trigger after an unlock method.
- 7. Click Save.

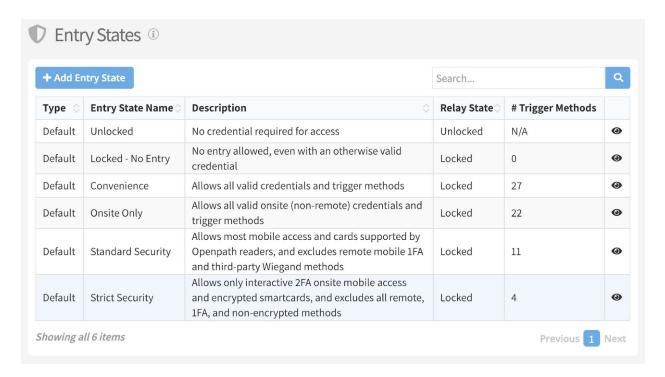


# **ENTRY STATE MANAGEMENT**

An Entry State defines whether an Entry is unlocked and what access methods may be used to unlock it. Openpath provides the following default Entry States:

- **Unlocked** no credential is required for access
- Locked no egroupgroupntry allowed, even with an otherwise valid credential
- **Convenience** allows all valid credentials and trigger methods
- Onsite Only allows all valid onsite credentials and trigger methods
- **Standard** allows most mobile access and cards, and excludes remote mobile 1FA and third-party Wiegand methods
- **Strict** allows only interactive 2FA onsite mobile access and encrypted smart cards. Excludes all remote, 1FA, and non-encrypted methods.

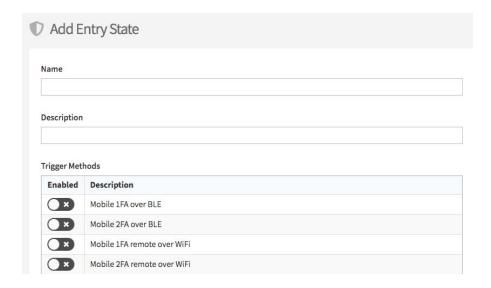
The **Trigger Methods** column refers to the number of ways that an Entry can be unlocked in that particular state.



Click the **View** button next to each default State in order to display the trigger methods for that State.

#### **CREATE ENTRY STATE**

1. To create a new Entry State, click the blue **Add Entry State** button in the top left corner.



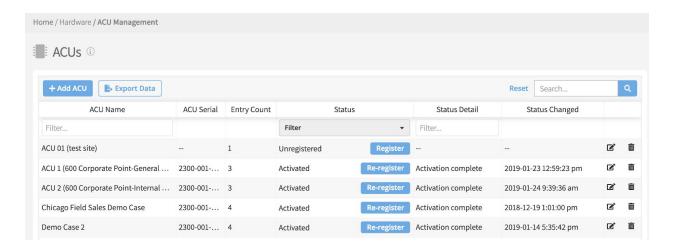
- 2. Use the sliders shown above to enable the trigger methods you want to be valid with this Entry State. Definitions for the various methods are provided at the bottom of the page.
- 3. Click the blue Create button when finished.

# **HARDWARE**

Hardware is divided in two categories: ACUs and Readers.

# **ACU MANAGEMENT**

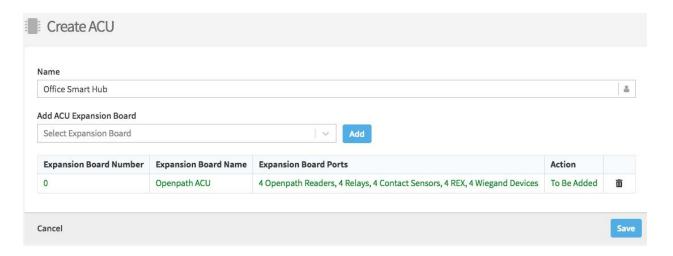
The ACU Management screen is where you can view and manage ACUs. You can export ACU data to CSV by clicking **Export Data**.





# ADD ACU

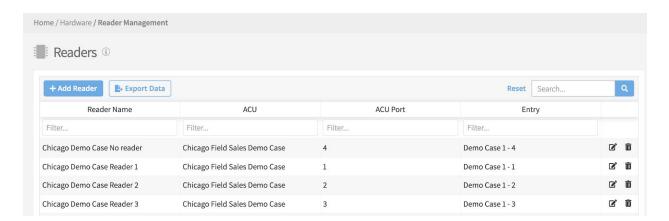
- 1. To add a new ACU, click the blue **Add ACU** button on the top left corner.
- 2. Enter a name for the ACU names are usually relevant to the location where the ACU is installed.
- 3. If using an expansion board, select it from the **Add ACU Expansion Board** drop down, otherwise leave it as Openpath ACU.
- 4. Click the blue **Add** button. A description of the ACU will appear in green. Click **Save**.



Once you add an ACU to the system, you need to register it (also known as provisioning). Please refer to the <a href="Openpath Access Control System Installation Guide">Openpath Access Control System Installation Guide</a>.

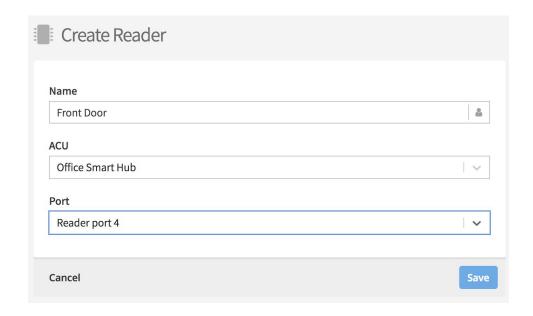
# READER MANAGEMENT

The Reader Management screen is where you can view and manage readers.



# ADD READER

- 1. To add a new reader, click the blue **Add Reader** button on the top left corner.
- 2. Enter a name for the reader names are usually relevant to the location where the reader is installed.
- 3. Select the ACU to which this reader belongs.
- 4. Select the port to which this reader is wired.
- 5. Click Save.



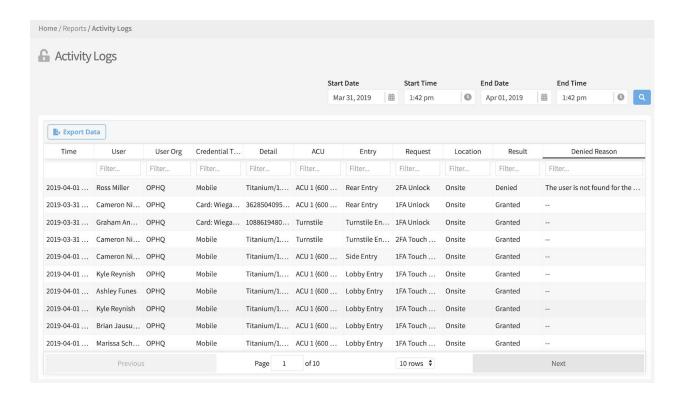
# **REPORTS**

Reports are where you can view activity logs, user activity, and entry activity.

# **ACTIVITY LOGS**

Activity Logs display a list of all unlock requests across your Openpath access control system. You can export Activity Log data to CSV by clicking **Export Data**.





The default view lists requests chronologically with most recent first. Filters can be used on the columns to narrow down the requests shown in the view. The Denied Reason column provides information on why access is denied.

# **USER ACTIVITY AND ENTRY ACTIVITY**

You can view user activity and entry activity via helpful charts and diagrams. All data can be exported to CSV.

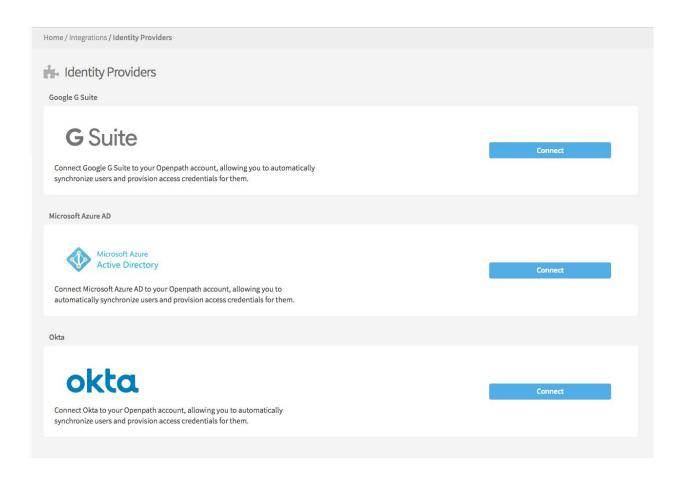
# **INTEGRATIONS**

Integrations are programmatic links to third party software and services, that let you sync users and add functionality to apps you already use.

# **IDENTITY PROVIDERS**

Identity provider integrations let you add and sync users from providers you already use. Currently, Openpath integrates with **Google G Suite**, **Microsoft Azure Active Directory**, and **Okta**.



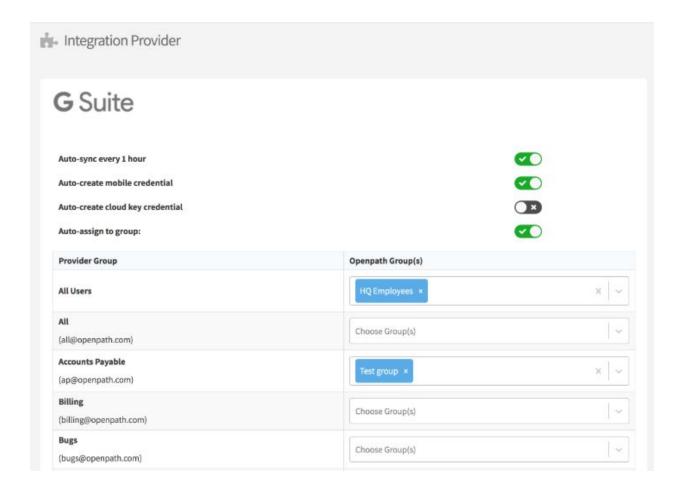


# **GOOGLE G SUITE**

**Note:** To enable this feature, you must have administrative privileges in your Google G Suite account.

- 1. Under Integrations > Identity Providers, click **Get Started** on the G Suite integration.
- 2. Google will prompt you to sign in. Sign in with your G Suite account and allow Openpath to access your users and groups. This is also where you can enable the **Single Sign On** feature. Be sure to take note of the **namespace**.
- 3. After signing in, you'll be directed back to Openpath where you can enable the following settings:
  - a. **Auto-sync every 1 hour** this will sync Openpath with G Suite once every hour.
  - b. Auto-create mobile credential this will create a mobile credential for every user.
  - c. **Auto-create cloud key credential** this will create a cloud key credential for every user.
  - d. **Auto-assign to group** this lets you assign G Suite groups to groups you've created in Openpath.

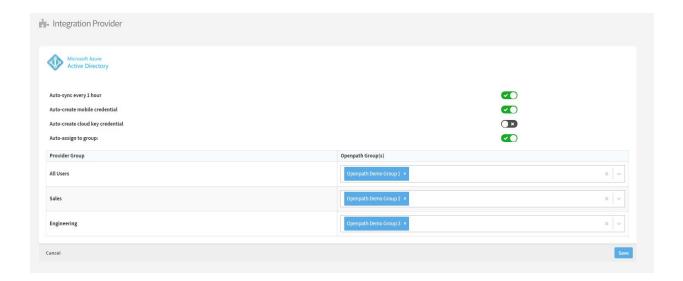




#### MICROSOFT AZURE ACTIVE DIRECTORY

**Note:** To enable this feature, you must have administrative privileges in your Azure Active Directory account.

- Under Integrations > Identity Providers, click Get Started on the Microsoft Azure AD integration.
- Microsoft will prompt you to sign in. Sign in with your Azure AD account and allow Openpath to
  access your users and groups. This is also where you can enable the **Single Sign On** feature. Be
  sure to take note of the **namespace**.
- 3. After signing in, you'll be directed back to Openpath where you can enable the following settings:
  - a. **Auto-sync every 1 hour** this will sync Openpath with Azure AD once every hour.
  - b. Auto-create mobile credential this will create a mobile credential for every user.
  - c. **Auto-create cloud key credential** this will create a cloud key credential for every user.
  - d. **Auto-assign to group** this lets you assign Azure AD groups to groups you've created in Openpath.



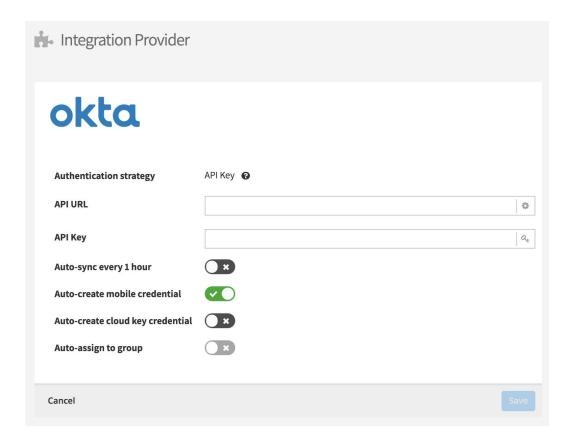
#### OKTA

**Note:** To enable this feature, you must have administrative privileges in your Okta account. We recommend using a <u>dedicated service account</u> that uses only the "Group" role as that role contains only the permissions that Openpath requires to synchronize your users and groups.

- 1. Under Integrations > Identity Providers, click **Get Started** on the Okta integration.
- 2. Enter your **API URL**. This should be the <u>Okta domain</u> for your organization, prefixed with *https://y*, for example, *https://yourcompanyname.okta.com*.
- 3. Enter an **API Key**. First you'll need to generate an <u>Okta API Key (Token)</u> associated with the Okta service account you have created for this integration. Ideally you should create a dedicated API Key to be used only with the Openpath integration, so that you have control over the lifecycle of this integration.

**Note:** Once you save the API Key, Openpath does not use or otherwise expose the API Key anywhere except when using it to call Okta to synchronize users and groups.

- 4. Configure the following settings:
  - a. **Auto-sync every 1 hour** this will sync Openpath with Okta once every hour.
  - b. Auto-create mobile credential this will create a mobile credential for every user.
  - c. **Auto-create cloud key credential** this will create a cloud key credential for every user.
  - d. **Auto-assign to group** this option will be grayed out until you save the API credentials. After saving, return to the settings page to use this feature. This option lets you assign Okta groups to groups you've created in Openpath.



# SINGLE SIGN-ON

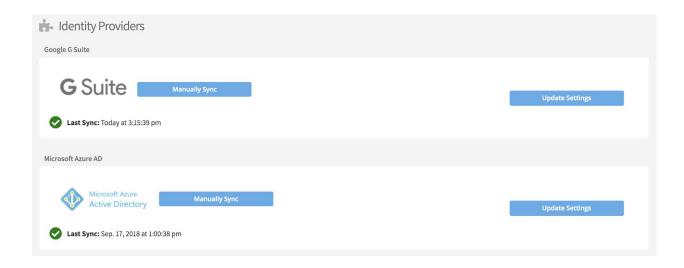
Google G Suite and Microsoft Azure Active Directory integrations support Single Sign-On (SSO). If enabled, users with portal access can log into the Control Center with their identity provider credentials.

**Note:** Openpath requires that you keep at least one Openpath-native administrative account in case there are ever any issues connecting to your identity provider.

# MANUALLY SYNC

After setup, you now have an option to **Manually Sync**. You can perform this action at any time.





# INBOUND WEBHOOKS

The Inbound Webhooks screen provides information on setting up webhooks for users and unlock events.

# **OUTBOUND WEBHOOKS**

#### SUBSCRIPTIONS

An outbound webhook subscription allows you to set up a listener for a "hook event," which will then trigger your choice of either a POST to your own specified target URL, or a "hook action" which is essentially a customized JSON configuration.

If you specify a target URL, your URL needs to be set up with "intent to subscribe," which is essentially like a handshake. This indicates that it intends to receive hooks from Openpath. When you add a subscription with a target URL, we will be sending a request to the target URL with an "x-hook-secret" header that has a unique value. This same header must be echoed in the response.

Hook actions are currently set up by the Openpath support team to handle a defined set of hooks that Openpath can process on your ACU. We expose the JSON configuration in the "Hook Actions" section, but highly recommend that you do not edit the configuration.

# **HOOK ACTIONS**

Hook actions are customized JSON configurations that are used as triggers for subscriptions. They handle specialized integration setups, such as triggering the disable of your ADT alarm.

Hook actions are currently set up by the Openpath support team to handle a defined set of hooks that Openpath can process on your ACU. We expose the JSON configuration here, but highly recommend that you do not edit the configuration.

# OTHER INTEGRATIONS

Use the Other Integrations screen to set up integrations with Slack and Zapier.

# **ADMINISTRATION**

The Administration tab is where you can define organization details and set up billing information.

# ORGANIZATION DETAILS

The Organization Details screen is where you can define the name of the organization and add a logo.



# BILLING

The Billing page is where you set up payment details for your Openpath subscription and accept the Terms and Conditions.

# ALERT SETTINGS

Configure Alert Settings to receive email or SMS (US mobile numbers only) warnings regarding:

- **Billing** invalid payments, expired terms, and/or your account being frozen
- Entry Ajar an Entry entering or leaving the ajar alarm state (i.e. when the contact sensor reports the door being open longer than the set duration. This is configured under Sites > Entry Management > Edit Entry, then scroll down to Contact Sensor.)
- Entry Authentication Failure an Entry unlock request failing due to an invalid credential being used (e.g. a card with a number/CSN unknown to the ACU)
- Entry Authorization Failure an Entry unlock request failing due to a user not having access to that Entry, using the wrong trigger method, or making an unlock request outside of associated schedules
- Entry Unlock Failure an Entry unlock request failing during the physical unlock phase, either due to a hardware issue or a failed webhook API call
- Entry Forced Open an Entry opening without first unlocking through Openpath or triggering the REX (this is configured under Sites > Entry Management > Edit Entry, then scroll down to Contact Sensor)
- Entry Anti-Passback Breach a user attempting to re-enter a defined Anti-Passback Area without first exiting and vice versa.

# **QUICK START**

Use Quick Start to set up a Site with ACUs and readers all on one page. This is useful if you're already familiar with setting up Openpath Sites.

# MY PROFILE

You can view and edit your profile by clicking the My Profile icon on the top right corner of the Control Center.







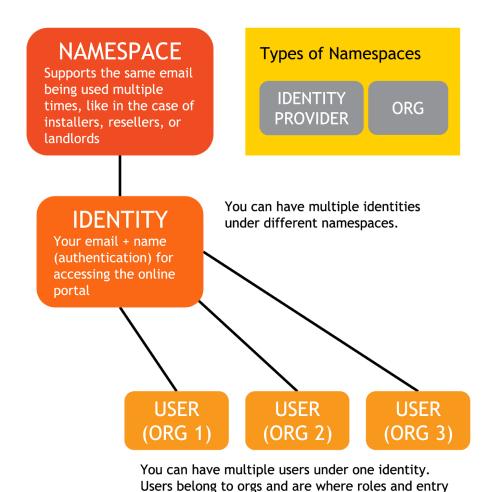
From there, you can edit your email and name (but not if you were imported from an identity provider), change your password, and configure Multi-Factor Authentication (MFA) by adding an



MFA Device such as Google Authenticator. This gives you an extra layer of security when logging into the Control Center.

# **USER DATA MODEL**

If you have portal access to more than one org, or you're using multiple identity provider integrations with SSO enabled, you should be familiar with how the Openpath user data model works.



A **namespace** is a contained pool of emails, all of which must are unique within the namespace. These emails (along with first name and last name and other info) are called **identities**. Identities are used for authentication and are what allow you to log into the Control Center. There are two types of namespaces: "identity provider" (e.g. G Suite, Active Directory), and "local org."

access are defined.

Namespaces allow the flexibility of having multiple instances of the same email that might come from different sources or have different authentication mechanisms (i.e. local password

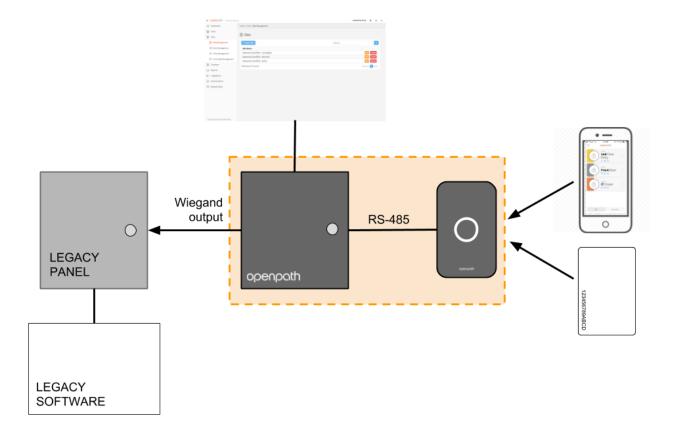


authentication or SSO). For example, you might have one identity (me@company.com) from when the org was created (under the local org namespace) that is authenticated through email and password. If you sync with an identity provider that has the same email (me@company.com) in it, another identity will be created under the identity provider namespace.

**Identities** are separate from, but related to **users**. A **user** is an instance of an identity that belongs to a specific org, so a single identity could have multiple users. This model allows a single identity (email and password) to be able to access multiple orgs, which is useful for resellers and installers that need to be able to log in once but have access to many orgs. Identities are what let you log into the Control Center; users are where you configure portal access, roles, and Entry access for a particular org.

# CONFIGURING OPENPATH WITH LEGACY SYSTEMS

You can configure Openpath to support existing legacy access control systems. In this setup, Openpath Smart Readers replace the legacy Wiegand readers and Openpath Smart Hub ACUs are installed between the Smart Readers and the legacy panel, with the Wiegand ports configured as outputs to the legacy panel. In this setup, the legacy panel makes the access control decisions while the Openpath hardware allows the use of Openpath credentials (including mobile and cloud key credentials).





If you're supporting a legacy system, there are a few items you need to configure in the Control Center:

- Under Entry settings, configure the Wiegand Device to Output (Gateway) mode. See WIEGAND
  DEVICE.
  - If you want card data to pass directly through to the legacy panel (without being authenticated by the Smart Hub ACU), enable **Gateway Credential Pass-Through**.
  - o If you want users who make authenticated unlock requests with valid Openpath credentials but do not have dedicated Use for Gateway Wiegand IDs to be sent to the legacy panel, define a **Default Gateway Card Number** that will be sent instead.
- If you want to send individual user credentials to the legacy panel (instead of setting up a Default Gateway Card Number for the Entry) you can create a Wiegand card credential (physical card not required) for the user and enable **Use for Gateway**. This way, that card number will be sent to the legacy panel whenever the user makes an authorized unlock request using any of the user's valid Openpath credentials. This is useful if you want to use one-to-one credential mapping for accurate user-level reporting within the legacy system. See <u>ADD A WIEGAND CREDENTIAL</u>.

# REGULATORY

All national and local electrical codes apply.

# **UL 294**

When the Openpath Smart Hub 4 Door Controller is enclosed in the E1 enclosure and powered by FPO75, the following performance levels are defined for the access control unit as per UL 294:

Attack: Level I
Endurance: Level I
Line Security: Level I
Standby: Level I
Single Point Locking Device with Key Locks: Level I

#### CAN/ULC 60831-11-1-16 GRADE 1

For C-UL Listed applications, the unit shall be installed in accordance with Part 1 of the Canadian Electrical Code.

# **FCC**

This device complies with part 15 of the FCC Rules. Operation is subject to the following two conditions: (1) This device may not cause harmful interference, and (2) this device must accept any interference received, including interference that may cause undesired operation. To comply with



FCC RF exposure compliance requirements, a separation distance of at least 20 cm should be maintained between the antenna of Openpath Smart Reader(s) and persons during operation.

NOTE: This equipment has been tested and found to comply with the limits for a Class A digital device, pursuant to part 15 of the FCC Rules. These limits are designed to provide reasonable protection against harmful interference when the equipment is operated in a commercial environment. This equipment generates, uses, and can radiate radio frequency energy and, if not installed and used in accordance with the instruction manual, may cause harmful interference to radio communications. Operation of this equipment in a residential area is likely to cause harmful interference in which case the user will be required to correct the interference at his own expense.

OP-RLF-STD/MULB: FCC ID: 2APJVOPRLF OP-RHF-STD/MULB: FCC ID: 2APJVOPRHF

# IEC 62368-1

- This equipment is intended only for use in a restricted access area.
- Securely fasten the equipment according to LifeSafety Power mounting instructions. See <u>FlexPower Vantage Standard Power System Installation Manual</u>.
- PROTECTIVE EARTHING: For safety, the Smart Hub must only be plugged into a grounded 3-prong outlet, wired with a minimum of 16 gauge wire to ground.