

**OSI**

Security Devices Inc.

*CONFIGURATOR*



“Wireless Access Management Solutions”

# USER'S GUIDE

**Version 2.0**

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OSI Portal Gateways have been approved for use under FCC ID T8H-PG16, and IC: 6498A-PG16. Operation is subject to conditional use. *"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."*

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## FCC Certification

This equipment has been tested and found to comply with the limits for Class B Digital Device, pursuant to Part 15 of the FCC Rules. These limits are designed to provide reasonable protection against harmful interference in a residential installation. This equipment generates and can radiate radio frequency energy and, if not installed and used in accordance with the instructions, may cause harmful interference to radio communications. However, there is no guarantee that interference will not occur in a particular installation. If this equipment does cause harmful interference to radio or television reception, which can be determined by turning the equipment off and on, you can try to correct the interference by taking one or more of the following measures.

- Reorient or relocate the receiving antenna
- Increase the separation between the equipment and receiver
- Connect the equipment into an outlet on a circuit different from that to which the receiver is connected
- Consult the dealer or an experienced radio/TV technician for help.

This device has been designed to operate with a maximum gain of 2.2 dBi. Approved antennas are listed below. Antennas not included in this list or having a gain greater than 2.2dBi are strictly prohibited for use with this device. The required antenna impedance is 50 ohms. The EUT is not designed for or intended to be used in portable applications (within 20 cm of the body of the user) and such uses are strictly prohibited. To ensure that the device complies with current FCC regulations limiting both maximum RF output power and human exposure to radio frequency radiation, a separation distance of at least 20 cm must be maintained between the unit's antenna and the body of the user and any nearby persons at all times and in all applications and uses and must not be co-located or operating in conjunction with any other antenna or transmitter.

### **Approved Antennas**

- Portal Gateway :  
Antenna Factor ANT-2.4-CW -RCT-xx
- Reader:  
Integrated Antenna
- Single Door Controller:  
Antenna Factor ANT-2.4-CW -RCT-xx

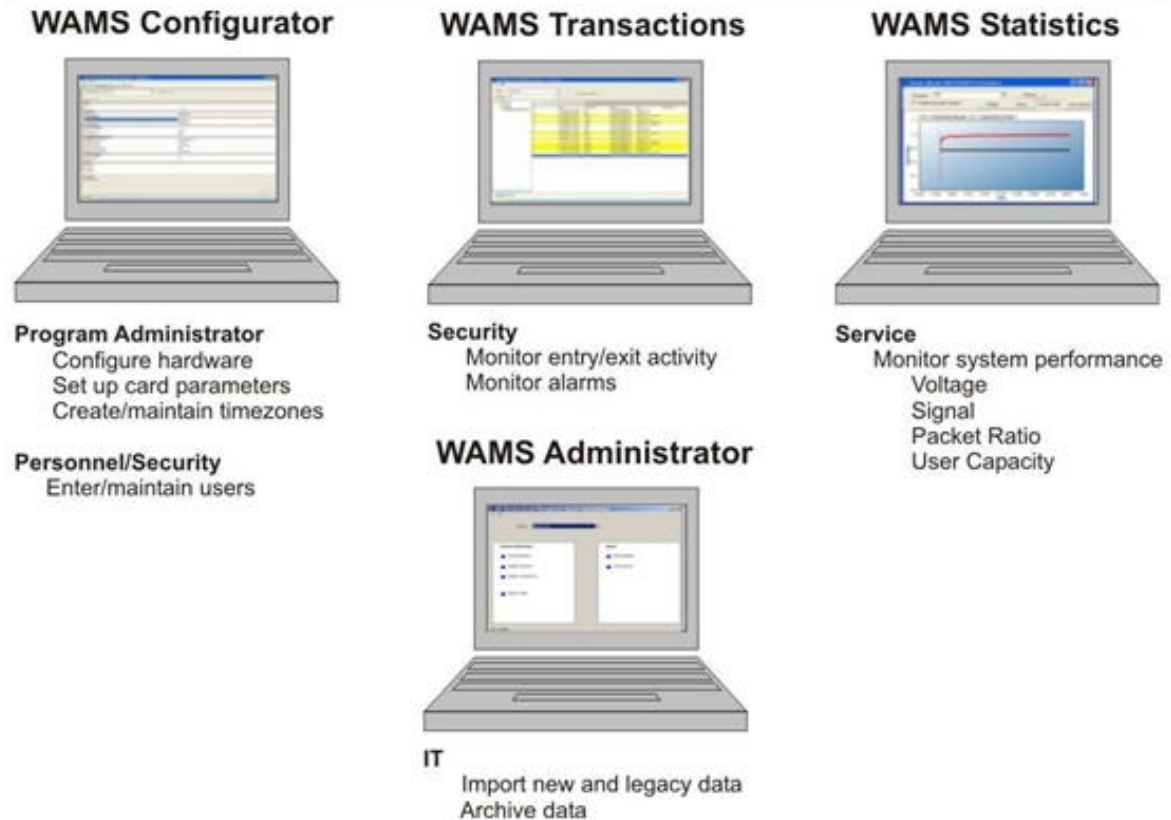
**IMPORTANT!** Any changes or modifications not expressly approved by the party responsible for compliance could void the user's authority to operate the equipment.

## SOFTWARE OVERVIEW

The OSI Wireless Access Management Solution (WAMS) provides powerful tools to manage your system: **WAMS Configurator**, **WAMS Transactions**, **WAMS Statistics Monitor**. View and print reports from WAMS Configurator and WAMS Transactions using **WAMS Reports**.

If you are the Program Administrator responsible for setting up communications between WAMS software and system portals and readers; you will spend most of your time using WAMS Configurator. If you are in personnel or security, you may be the person who adds users to the system and gives them access privileges and IDs. You will spend most of your time on the Users tab of the WAMS Configurator. If you are responsible to oversee security for your organization, you will monitor all access and alarm activity using WAMS Transactions. If you are the person responsible to ensure the system is operating at maximum performance, you will use the WAMS Statistics Monitor. If your organization is small, you may use all three!





Once the software is installed, you will find the WAMS Configurator shortcut on your desktop. You can access all applications from the WAMS Configurator main menu. You can also access these applications from the Windows Start Menu.

## WAMS Users

WAMS Users, as opposed to reader users, are those individuals who will operate one or all of WAMS software applications. For example, a WAMS User might be a person in the Security department who will use only WAMS Transaction software to monitor system access activity. Another WAMS User might be a person in Human Resources or Administration who is assigned to add users to the system, or change their settings.

Most WAMS users will be added to the system as reader users because they will have some type of physical access to the facility, but they must also be assigned as WAMS Users and be given Usernames and Passwords if they are to access and operate WAMS application software.

## User Types

WAMS Users can be one of four User Types: Administrator, Manager, Service, and General. You will be assigned a User Type depending on which WAMS applications you will log in to and operate.

**Administrator** - An Administrator has access to all WAMS applications and all facilities. This User Type would be assigned to a System Administrator, that is, someone who is responsible for set up and configuration.

**Manager** - Can access all WAMS applications. This type would, for example, be assigned to someone responsible for adding users to the system. As an additional security measure, this type could be restricted to access specific facilities only.

**Service** - Can access WAMS Transactions and WAMS Statistics Monitor. This User Type can also be restricted to specific facilities only, if needed.

**General** - Can access only the WAMS Transactions and WAMS Reports applications for specific facilities. This user type would be assigned to someone in Security for example, who will monitor daily entry and exit activity and system alarms. They can not access the WAMS Configurator application.

Once an Administrator has logged in to the system, they can add WAMS Users to the system. If you are designated as a WAMS User, you will be assigned a login User Name and Password to access the Software Application(s) you need.

## USING WAMS CONFIGURATOR

If you are in Human Resources, Personnel, or Security; you may be the person who adds users to the system and gives them access privileges and IDs. You will spend most of your time on the Users tab of the WAMS Configurator. The following sections describe how to launch WAMS Configurator, provide a brief overview of the WAMS Display and Tab options.

### Launching WAMS Configurator

When WAMS software is loaded onto your computer, it places a shortcut to WAMS on your desktop.



Double-click the WAMS Configurator icon to start the application.

The OSI WAMS splash screen appears briefly, then the Login dialog box opens.



If you are a WAMS User, your System Administrator or IT representative must provide you a Login Name and Password. You will need this to login the WAMS Configurator. If you are a System Administrator, see the Administrator's Guide for more information about Launching WAMS for the first time.

#### **To Login to the WAMS Configurator:**

1. Enter your case-sensitive **Login Name** and **Password**.
2. Select **Login**. WAMS Configurator opens at the Reader Tab.



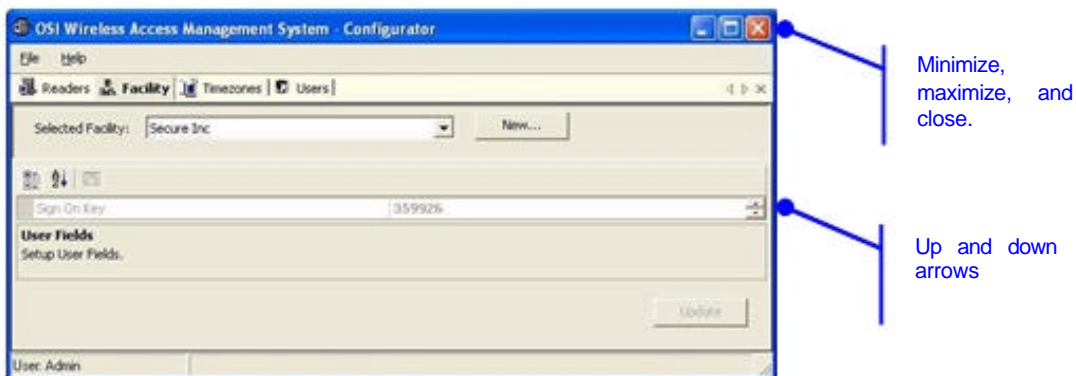
If the System Administrator has created only one facility, you are ready to begin. If more than one facility has been created, select the facility from the drop-down list. Any elements you access in WAMS Configurator will be directed to that facility.

**IMPORTANT:** Once the System login and password have been personalized for your facility, it is important to record the information in hard copy form and safeguard it in a location known to management.

## Display Options

All tasks in WAMS start from the WAMS Configurator, which has four tabs: **Readers, Facility, Timezones, and Users.** Following is a brief description of WAMS display options and how the tabs are used to perform tasks. WAMS operates in the Windows environment using its standard conventions. You can use WAMS full screen or resize the window using the min/max buttons in the top right corner of the Configurator.

In minimized view, use the up or down arrows to select from a list of categories or options. Following is the Facility Tab in minimized view with the scroll bar visible.



In the Facility and Users Tabs you can display items by category or sort alphabetically. This is useful when displaying the Configurator in full-screen view.

## Tab Options

The WAMS Configurator contains four tabs: Readers, Facility, Timezones, and Users. You will select these tabs depending on which program tasks you wish to perform.

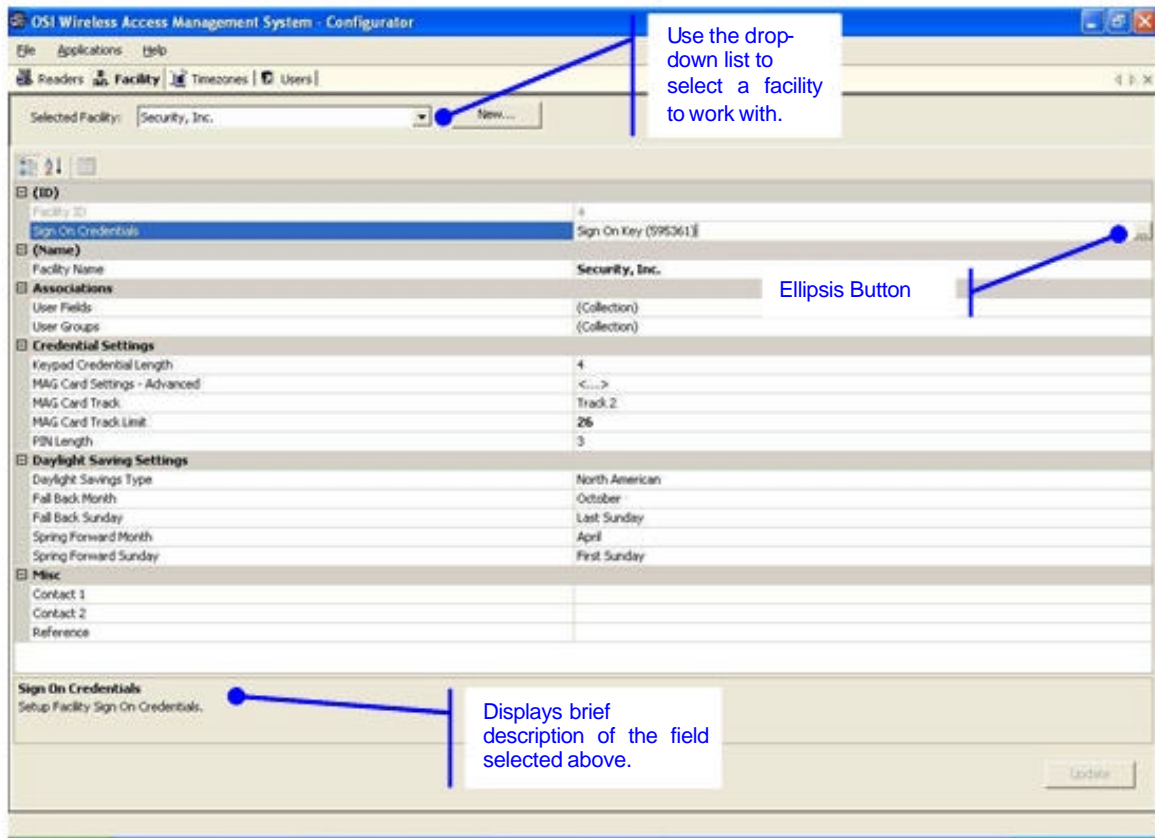
If your Program Administrator has created more than one facility, you will need to select the facility you wish to work with from the Facility Tab before moving on to add or maintain users assigned to that facility. Following is a quick tour of the WAMS Configurator tabs.

### Facility Tab

Most Facility set up tasks are performed in the Facility Tab. Here, the Program Administrator will create User Groups, Timezones, and configure WAMS software to work with the type of facility access cards or keypad credentials you will use.

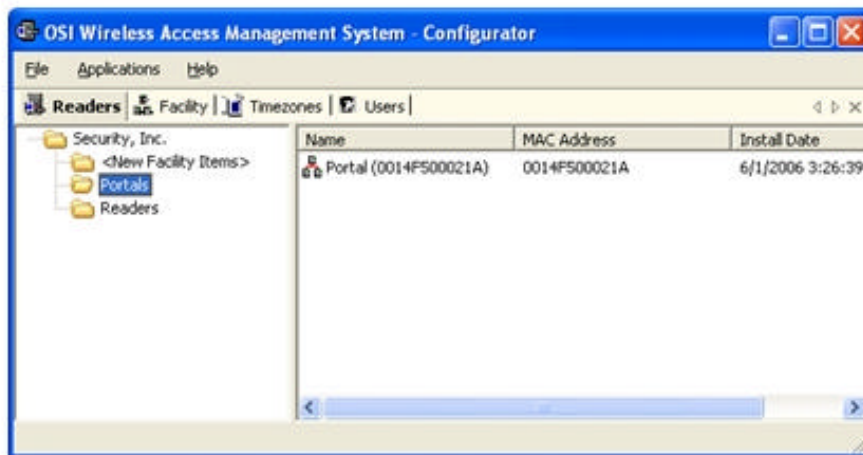
If your Program Administrator has created more than one facility, you will first select the facility you wish to work with in the Facility Tab before moving on to add or maintain users assigned to that facility.

Following is the Facility Tab displayed in full-screen, category view. Once you select a category, you can drill down to additional settings using the ellipsis button.



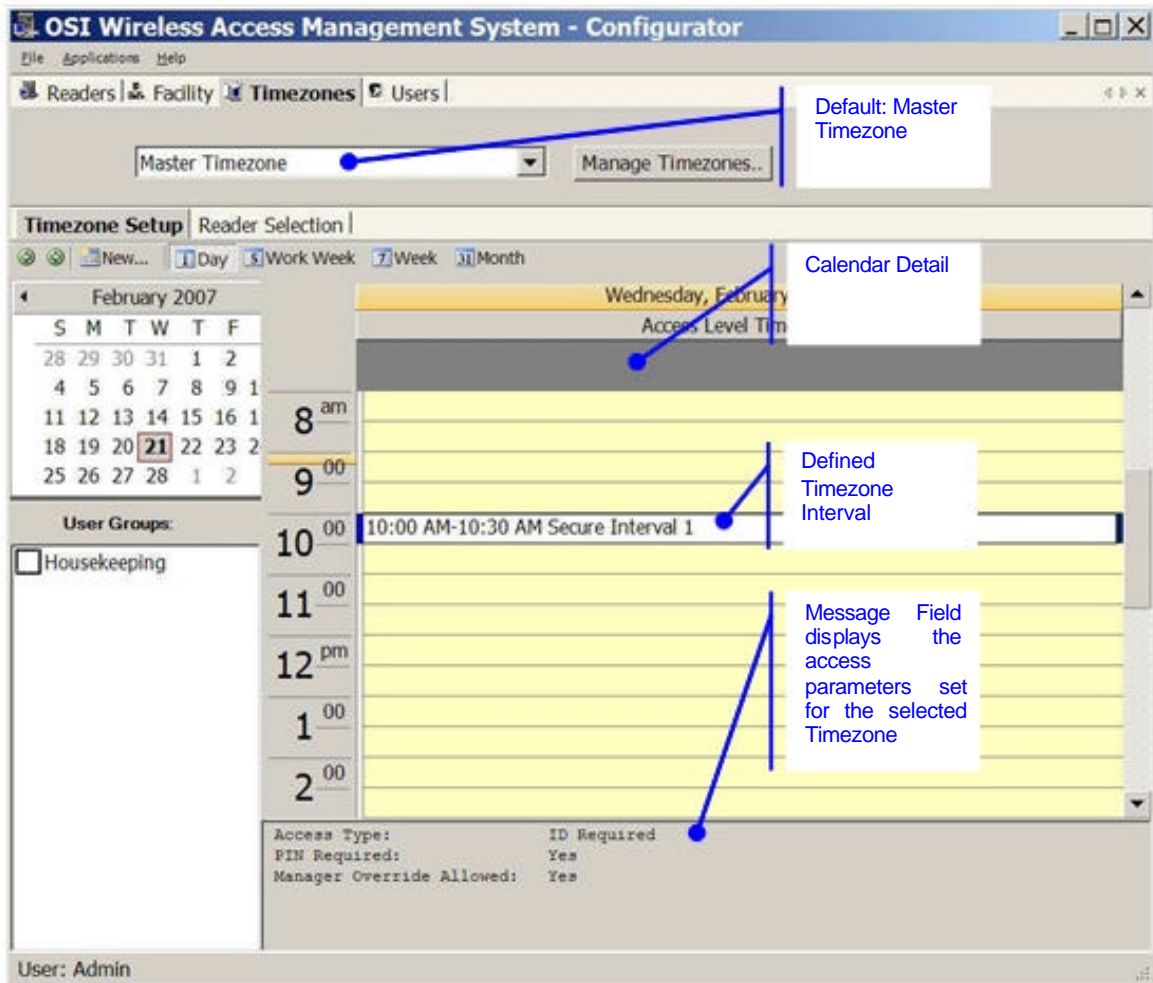
## Readers Tab

The Readers tab displays the Facility Tree, which is a visual representation of all portal gateways, readers, and I/O devices connected to the WAMS software. Once the devices are organized in the Facility Tree, the various paths to associate readers and portals are available when you add new users to the system. If you are using dialup gateway modems in your system, you can perform an automatic dial out from here. Information about creating the Facility Tree and assigning devices to the various folders in the tree is presented in the Administrator's Guide. Typically, only the Program Administrator will perform tasks using the Readers Tab.



## Timezones Tab

The WAMS program automatically assigns all readers to a Master Timezone. Your Program Administrator can create any number of Timezone Intervals and Timezone Groups to modify user access within the Master Timezone. The Timezones tab displays the default *Master Timezone*, a calendar that operates similar to Microsoft Outlook, and any Timezone User Groups that have been created. (For more information about creating Timezone Intervals and Timezone Groups, see the Administrator's Guide.)



## Users Tab

If you have been assigned responsibility to add users to the system, your tasks will be performed in the Users Tab. This tab is described in detail in the following section.

## Adding Users to the Facility

Once all hardware and software have been configured, the system is ready for you to add users to it. Follow the steps in this section the first time you enter users, and each time you add a new user to the system.

To get started, launch WAMS Configurator. The program opens at the Facility Tab. If your organization has been configured with more than one facility, select the facility you want to work with, then select the Users Tab.

## Before You Begin

Before you begin adding users to the system for the first time, be prepared to address the following items:

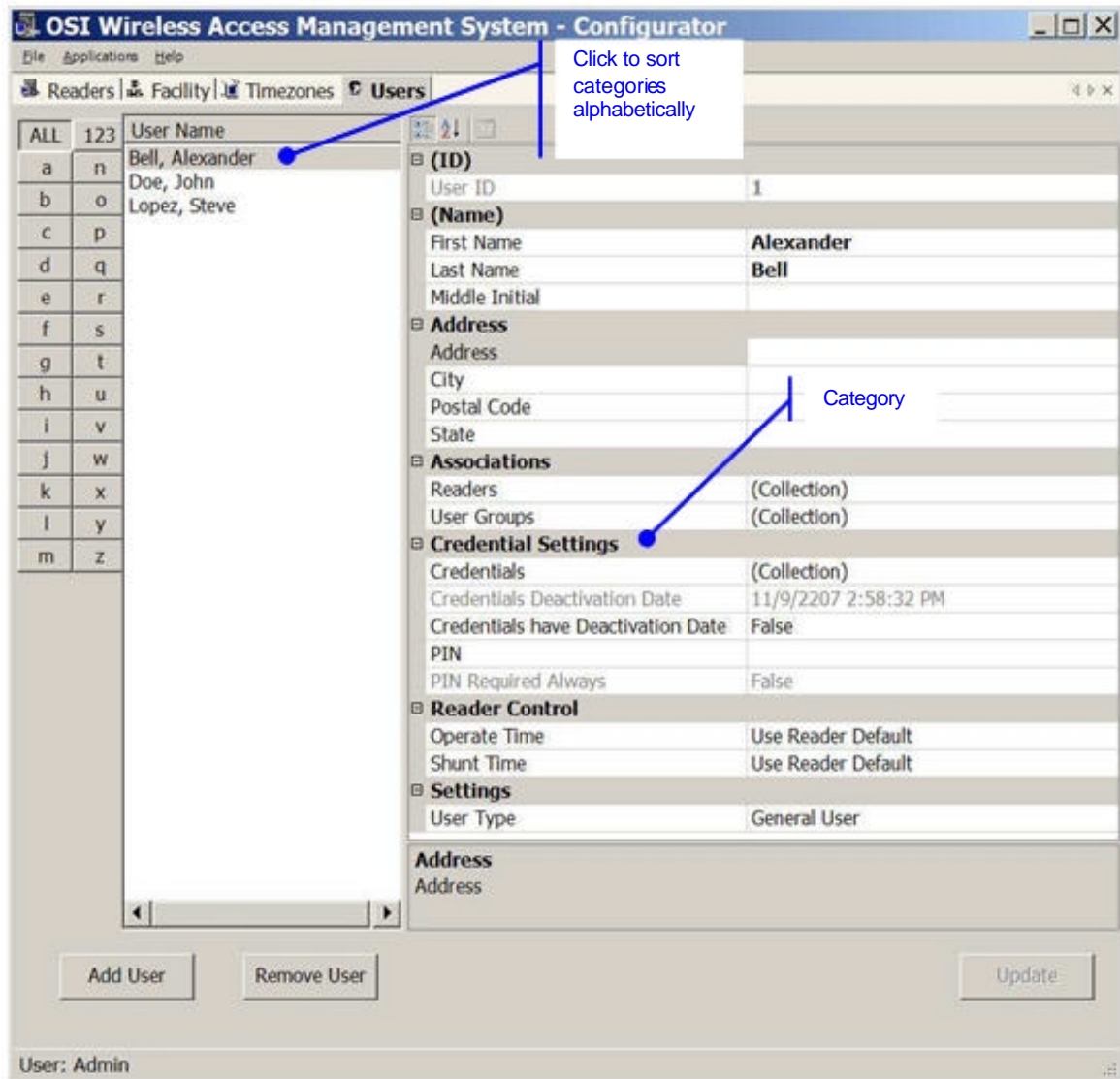
IF	THEN
☞ You plan to use only keypad readers	WAMS assigns a unique keypad credential number to each new user and automatically registers it with the system.
☞ You plan to use card readers	You must know the card type and settings required for that type.
☞ You plan to use a serial scanning device at your computer to register user credentials	The scanning device must be attached to the computer com port and you must be able to identify that port (Com1, Com 2) when you register the credential.
☞ You plan to use local readers to register credentials	Know the reader name and locations to be used.
☞ You plan to manually enter the credential numbers	Have a credential number list or creating conventions ready to enter.


**NOTE:** *If you do not have this information, contact your System Administrator before you continue.*



### Users Tab Overview

In the Users Tab, all users currently in the system display in the list on the left. If you have a large number of users, you can use the alphabet buttons on the far left to sort through the list quickly. User Categories display on the right. By default, these categories display as shown; however you can click the A-Z sort button to display categories alphabetically. Here you can add or remove users from the system, set their credentials, and include any personal information needed to identify that person in the system.



If an ellipsis button  displays when you select a field, additional parameters are available for selection. From here you will define user name and address information and access parameters such as readers, user groups, credentials, PIN, and so on.

**NOTE:** If you see a need for additional fields to define for your Users, contact your System Administrator. They can add more fields to the Users Tab, or create additional User Fields unique to your organization.

The following sections provide a brief description of each category in the Users Tab, and present steps for adding and configuring users in the system.

## ID

When you add a user, the system automatically assigns them a unique ID and displays the number in the User ID field.

## Name

Provides entry fields for user first and last name and middle initial.

### ***To add a user name:***

1. In the Users Tab of the WAMS Configurator, select the **Add User** button. In the ID category, the system will display a new unique User ID.
2. In the First Name line, place the cursor in the space following **<New>** and enter a first name.
3. In the Last Name line, place the cursor in the space following **<User>** and enter a last name. Do the same for the Middle Initial.

***NOTE:*** *The Update button will flash to remind you to update your settings. You can update each time you add a user, or wait until all user information is added. The software will automatically update your settings when you leave the Users tab.*

## User Defined Fields

If your facility has been configured with User Defined Fields, such as Address, City, Zip Code, enter the information as configured.

## Associations

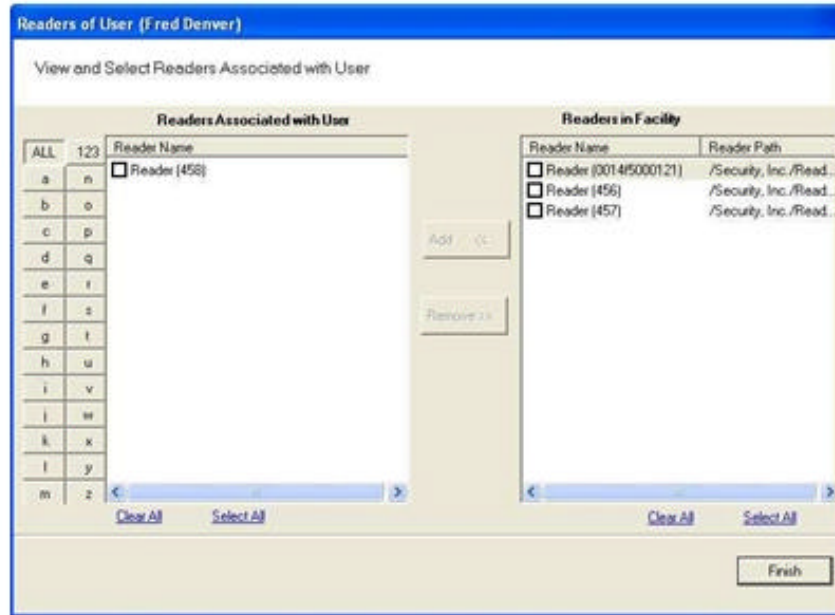
In this category, you associate users with Readers and User Groups. This task defines which readers will recognize the user's requests for entry and exit. If User Groups have been created for your organization, these will also be available for selection from the Associations category.

### ***Readers***

When you add a user to the system, you will associate them with the reader(s) that will recognize their requests for entry and exit.

### ***To associate a user with readers:***

1. In the Associations category, Readers line, place the cursor next to (collection).
2. Select the ellipsis button at the right of the field. The *View and Select Readers Associated with User* dialog box opens.



3. Select the reader(s) from *Readers in Facility*.
4. Select **Add <<**. The selected readers are moved from the Readers in Facility list to the Readers Associated with User list on the left. You can associate a user with any number of readers.
5. Select **Finish** to save your settings and return to the Users Tab.

### User Groups

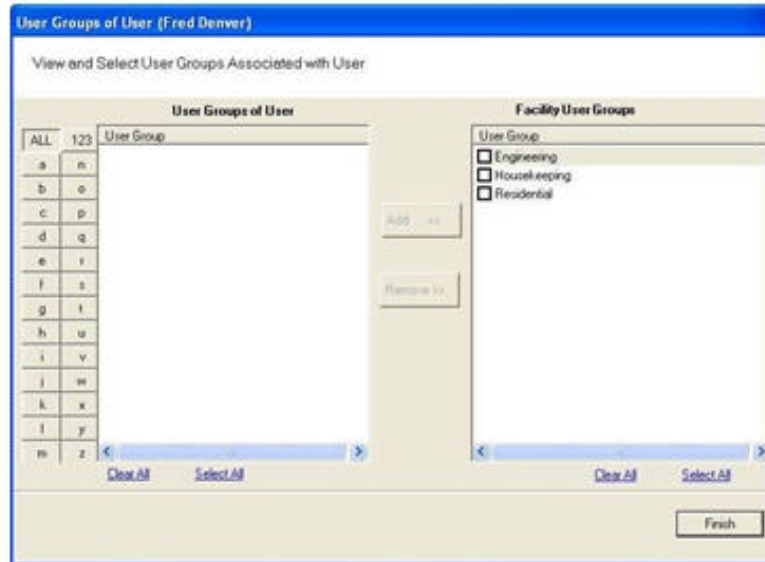
If User Groups have been created for your facility, these will already be associated with readers. For example, a User Group may have been defined for Laboratory Building 1. Laboratory Building 1 might have six readers. By assigning the user to the Laboratory Building 1 Users Group, they will automatically be associated with all the readers in that group.

A User Group may also be defined as a Timezone Group. Timezone User Groups further define access levels for the Master Timezone. You can restrict access of certain groups of employees to a specific time period. For example, you may have a housekeeping group designated as a Timezone Group with restricted access to dormitories from 8:00 a.m. to 4:00 p.m., weekdays only. You would then assign users from the housekeeping department to this group. For more information about creating Timezone Groups, see the Administrator's Guide. Steps to add users to User Groups are presented in the following section.

#### To add a user to a User Group:

1. When adding or editing a User, in the Associations Category, click in the User Groups field and click the ellipsis button. The User Groups of User dialog box opens.





2. Select the group(s) to associate with this user and click the **Add <<** button. The groups are added to the User of Groups list.
3. Select **Finish** to save your selections and return to the Users Tab. You can add or change User Groups for a user any time by returning to this list.

**NOTE:** You can also add users to User Groups from the Facility Tab, User Groups field. For more information about this feature, see Facility Associations, User Groups in the Administrators Guide.

## Credential Settings

WAMS tracks individual requests for access or exit from the facility by their unique credentials, and each request is recorded as a transaction in the WAMS database for reference. Whether your organization uses keypad readers or card readers, each user will be assigned a unique credential number. Under Credential Settings, you will enter the credential ID and number, select a credential type, and set additional parameters related to the credential type. You can add another level of security by combining an individual's credential with a personal ID number (PIN). If your organization requires a PIN, you will enter them here.

Credential setup is a two-step process: First you will select the credential type to be used, then you will register the credential

### Keypad Type

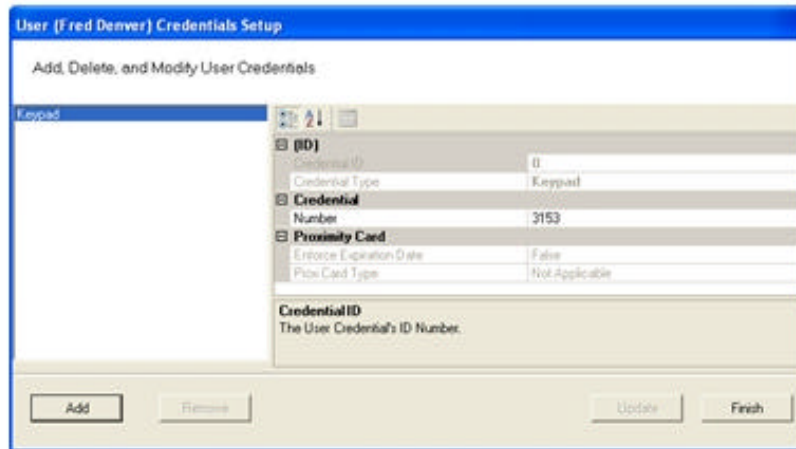
The default credential type in WAMS is Keypad. When you add a user to the system, WAMS assigns them a unique keypad credential number, then automatically registers it with the system. If your facility uses only keypads, once you add the new user name, you can skip to Adding PINs and Expirations Dates.

### Card Types

If your facility uses card type credentials, you must select the card type, enter the appropriate settings, and then register the credential number with the system.

**To select the card type:**

1. In the Users Tab, Credentials line, place the cursor next to (Collection) and select the ellipsis button. The User Credentials Setup dialog box opens. The credential types are listed on the left and the categories available for each type are listed on the right.



2. Select the type of credential the reader will use, for example, magnetic stripe card (Mag Card). The credential options in the categories on the right will change, depending on the type selected. Now you are ready to register the credential.

**NOTE:** *If the credential type you need is not in the list of card types on the left, you can add one. See Adding a Credential later in this section.*

### **Credential De-Activation**

You can define whether a user's credentials can be automatically de-activated. This is useful, for example, when entering credentials for a temporary employee or contractor. If the credential can be de-activated, select **True** from the drop-down list next to the field, and then enter the de-activation date in the De-Activation Date field. If the credential cannot be de-activated, select **False** from the drop-down list. The default de-activation date is 200 years to ensure a user's credential is not inadvertently de-activated.

### **Registering the Credential**

When you select a credential type, the Specify the Credential Number dialog box opens. From here, you can enter the credential number manually, scan the user's card with a scanning device connected to your computer, or specify a reader where the user will scan their card. Steps to register each type of card are presented in the next few sections.

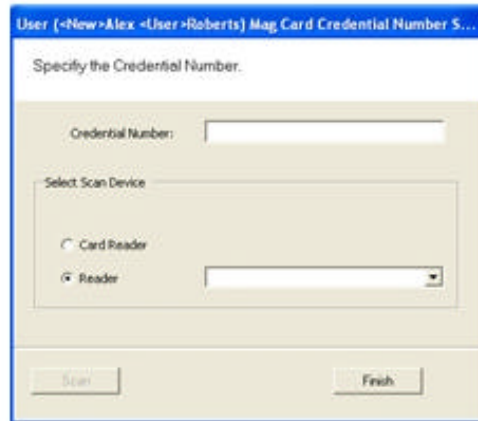
**NOTE:** *If you use the reader scan method, the card used must be unassigned. You can have any one of the other types, or none.*

**To register a Keypad credential:**

1. Keypad credentials are automatically registered by the system, and no further steps are required.

**To register a Magnetic Stripe Card credential:**

1. From the User Credential Setup dialog box, select **Mag Card** from the list. The Users Mag Card Credential Number dialog box opens.



2. Enter a Credential Number manually (must be less than 16 characters, zeros will be prepended) or select a scan device:

**Card Reader**

- ⚡ If you have a scanning device connected to your computer, select **Card Reader**. When you are ready to scan the card, select the **Scan** button. You will have 30 seconds to scan the card.



When recognized, the number will display in the Credential Number text box. Select **Finish** and return to the Credential Setup dialog box.