AVIGILON™

Enrollment Operator Guide

Access Control Manager™

Version 6.50.0

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Introduction

This guide provides an overview of the default Enrollment Operator role as defined in the Avigilon Access Control Manager (ACM™) software. This guide is meant to be used and referred to by those assigned the role of an Enrollment Operator within the ACM software.

Enrollment Operators manage identities within the system. They are responsible for creating new identities and maintaining identity records. Enrollment Operators are also responsible for creating, issuing, and printing badges. For more information, see *Permissions and Rights* on page 17.

> **Note:** This guide does not define the role of an Enrollment Operator on all sites. Please contact your System Administrator for more details.

Adding an Identity

A person with an identity record in ACM can be issued a badge to enter the physical site. A user of the ACM software can be issued a login and password.

To add a new identity:

1. Select ▦ **Identities**.

2. Click ➕ **Add Identity**.

   If Identity Profiles are configured, select the profile for the identity and click **OK**. The Identity Add page appears with the details of the identity profile. Otherwise, click **Cancel**.

Identity Profile	✖
Identity Profile: Marketing Department ▾	
	OK Cancel

3. Fill out the **Last Name** field and the required details.

   > **Note:** Additional fields can be added using the User Forms or User Lists feature. *Identities using SALTO devices only.* First Name and Last Name are required. *Identities using HID Origo tokens only.* First Name, Last Name, and Email Address are required to enroll the identity in HID Origo.

4. Click ✔ **Save**.

5. Assign roles to the identity as required on the **Roles** tab and click ✓ .

   To add an item, select it from the **Available** list and click ▶ .

   To remove an item, select it from the **Members** list and click ◀ .

   > **Tip:** Use Shift + Click to select items in sequence. Use Ctrl + Click to select individual items.

6. Enter the token details as required on the **Tokens** tab.

   By default the **Download** checkbox is selected, which downloads the token to the connected panels and associated doors. *Identities using SALTO devices only*. Click the **Download** button, which downloads the token to the SALTO server and door. *Identities using ASSA ABLOY IP devices only*. Click the **Download** button, which downloads the token to the DSR and door.

   When you are finished, click ✓ .

7. Optional: Add notes about the identity and review previous notes, if any.
8. Add more details about the identity on the following tabs:
   - **Roles**: Assigns a role to this identity.
   - **Tokens** : Creates a token for the identity.
   - **Groups**: Assigns the identity to a group.
   - **Capture**: Takes a photo of the user.
   - **Photos**: Uploads an existing photo of the user.
   - **Badge**: Assigns a badge to the user.
   - **Timed Access**: Assigns timed access to the user.
   - **Access**: View the identity's access privileges including roles, access groups and doors.
   - **Transactions**: View transactional data associated with the identity.
   - **Audit**: View a log of all the changes that have been made to this identity.

     The default Enrollment Operator role does not have access to this tab. Contact your System Administrator for more details.

   > **Note:** The labels of the built-in tabs, such as Identity and Tokens, may be renamed by your System Administrator. A custom form or User Defined Tabs with User Defined Fields may be added at the end of the list.

Identities

The Identities screen gives you access to all tokens and operators of the system. An identity is added to the system when a new user needs access to the site. For example, when a person is hired. Access to a site may be physical access to an area or access to the ACM system to manage the site.

Physical access to the site allows a user to access areas and doors. Access to the ACM system allows users to manage the site, such as adding users or monitoring events.

For a user to have access to the system or physical access to the site, they must have an identity.

- If the user requires access to the system, they are issued a login and password. This allows the user to access areas of the system. The areas of the system the user has access to depends on their role.
- If a user requires physical access to the site, they are issued a token. The token gives the user physical access to the site. This allows the user to access areas on the site. The areas the user has access to depends on their role in the system.

Assigning Roles to Identities

A role defines what a user has access to. For identities to have access to the system or physical access to the site, they must be assigned a role. Each role contains access groups and/or delegations. Access groups allow a user to have physical access to the site. Delegations allow a user to have access to the system. The user will be assigned a role depending on their position in the organization.

To assign roles to an identity:

1. Click ▥ **Identities**.
2. From the Identities Search page, perform a search for an identity.

   For more information, see *Searching for an Identity* on page 13.
3. Click on the name of the identity you want to edit.
4. Select the **Roles** tab.
5. From the Available list, select all the roles that you want to assign to the user, then click ▶ .

   The role is added to the Members list to show that it is now assigned.

   To remove a role from the user, select the role from the Members list, then click ◀ .

   > **Note:** You can select multiple items by using the **Ctrl** or **Shift** key.

6. Click ✔ **Save**.

Assigning Tokens to Identities

Tokens are used to authenticate individuals and allow or deny them physical access to your site. Tokens are assigned to personnel identity records along with access cards, biometric data such as fingerprints, or connected devices such as smartphones with apps that can be presented for authentication at readers.

To further restrict access, identities can be assigned to specific roles within your site.

To create tokens and assign them to an identity:

1. Select 🗂 **Identities** > **Identities**.
2. Search for an identity.

   For more information, see *Searching for an Identity* on page 13.
3. Click the name of the identity you want to edit.
4. Select the **Tokens** tab.
5. If only one token has been defined, the Token: Edit page appears.

   If more than one token has been defined, the Tokens list appears. Click **Add Token**.
6. Enter the details as required.

   > **Note:** If you are assigning HID Origo tokens, see *Enrolling Identities and Issuing HID Origo Tokens* on page 15.

7. Click ✔ and then ✖ to return to the identity search.
8. Click **Download** to download the token to the connected panels and associated doors.
9. To assign this token to a badge, select the **Badge** tab.

   From the **Badge Token** drop down list, select the internal number you want to assign to the badge.
10. Click ✔ .

Assigning Groups to Identities

Groups are used to group physical and/or system components. Groups are assigned to identities primarily for batch updates. For example, if all the badges are close to expiry and they are assigned to the same group, the expiration date can be extended through a batch job.

To assign groups to an identity:

1. Click 🗂 **Identities**.
2. From the Identities Search page, perform a search for an identity.

   For more information, see *Searching for an Identity* on page 13.
3. Click on the name of the identity you want to edit.
4. Select the **Groups** tab.
5. From the Available list, select all the groups that you want to add the user to, then click ▶ .

   The group is added to the Members list to show that the user is now a member.

   To remove a user from a group, select the group from the Members list, then click ◀ .

   > **Note:** You can select multiple terms by using the **Ctrl** or **Shift** key.

6. Click ✔ **Save**.

Capturing and Uploading Photos of an Identity

Capture or upload photos of a person from the **Photos** tab on a person's **Identity** page. Then you can select a photo from this page to appear on that person's Identity page or printed on an access badge.

Captured photo: A photograph taken by a badge camera connected to your computer and to the ACM system, and saved in the ACM system. Captured photos are in JPG format.

Uploaded photo: A graphics file in JPG, PNG, or GIF format that you upload from any location your computer can access and save in the ACM system. Typically, you would upload a JPG file for access badges.

> **Note:** The Microsoft Edge web browser supports only the uploading of JPG files. Do not attempt to upload any other file format if you are using the ACM client in the Microsoft Edge web browser. Using photos taken directly from a mobile phone is supported.

Photos saved in the ACM system can be cropped, resized, and rotated to meet the standardized requirements of the badge templates defined in your system.

You can use two types of cameras as a badge camera to capture a photo:

- **Local Camera** — Any camera connected directly to your computer or built into your computer or monitor.
- **IP-based camera** — Any IP-based camera previously connected to your network and added to your ACM system.

Before you can:

- Use a camera to capture photos, you must specify the badge camera you want to use in your user profile. For more information, see *External Systems - Defining the Badge Camera for the System* on page 19.
- Generate and print a badge, at least one badge template must be defined in your system.

After a photo has been added to the **Photos** tab of an identity, you can edit the photo to suit the requirements of your badge templates. Then you can create a badge with that photo. For more information, see *Creating Badges for Identities* on page 12.

Capturing a photo

1. There are two ways to access the Capture page:

   - From the Identities Search page, click from the **Image Capture** column.
   - From the Identities Search page, click on the name of an identity, select the **Photos** tab, then click **Capture a Photo**.
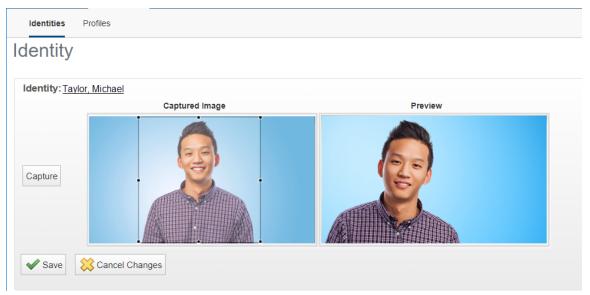
2. If you are using:

   a. A local camera that you have not used before, this page will not appear unless you allow your web browser to access your camera. The first time you access the Capture page, you are prompted to allow your browser to access your local camera. Click **Allow**.

   b. An IP-based camera and the camera requires authentication, this page will not appear until you have entered your login credentials.

      Enter a user name and password, then click **OK**.

   The Capture page appears, with the live preview from the camera showing on the right.

3. Click **Capture**.

The page refreshes to show the captured photo on the left and the live preview on the right.

A cropping overlay is imposed over the photo, The aspect ratio of the overlay is determined by the values set on the **System Settings** page for **Badge Template Photo Height** and **Badge Template Photo Width**.

4. Click:

- **Save** to save the photo that part of the image highlighted in the cropping overlay is saved. Cropping the photo using this aspect ratio ensures that the photo will fit exactly into the photo area on the badge without any distortion.

- **Save and Edit** to save the photo and open the photo editing tool, or **Save** to add the photo directly to the **Photos** tab.

5. On the **Photos** tab, select the **Primary** checkbox if you want this photo to appear on this person's Identity page and access badge.

6. Click **Save**.

Uploading a photo

1. From the Identities Search page, click on the name of an identity, select the **Photos** tab, then click **Upload a Photo**.

The screen expands to include more fields.

2. Click **Choose File** and navigate the directory to find the photo you want to upload.

Click **Open** to select the photo. You can upload files in JPG, PNG, or GIF format.

3. On the **Photos** tab, click the **Primary** checkbox if you want this photo to appear on this person's Identity page and access badge. If no primary photo is selected, the first photo on the list is used.
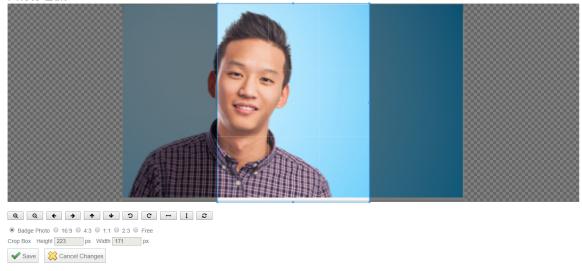
4. Click **Save**.

Editing a photo

You can edit a captured photo when you first save it by clicking **Save and Edit**. You can edit any saved photo by clicking on its filename link or thumbnail photo on the **Photos** tab.

The photo is displayed with a brighter cropping overlay imposed over it. The overlay is preset to the **Badge**

Photo aspect ratio. This ratio is determined by the values set on the **System Settings** page for **Badge Template Photo Height** and **Badge Template Photo Width**. Cropping the photo using this aspect ratio ensures that the photo will fit exactly into the photo area on the badge without any distortion.

Use the mouse in combination with the control buttons under the photo to crop, resize, rotate and flip the photo. You cannot edit the actual photo, or change its resolution by zooming in and out. The dimensions shown in the Crop Box options are read-only and cannot be entered directly, but are dynamically updated as you manipulate the cropping overlay with the mouse.

Photo Edit

1. Adjust the overlay.
     - To reposition the overlay over the photo:
          a. Click inside the cropping overlay.
          b. Drag the mouse to move the overlay.
     - To resize the overlay
          a. Click on the bounding frame. The mouse cursor will change to indicate the direction the overlay can be resized.
          b. Resize the overlay. The selected aspect ratio (usually the Badge Photo aspect ratio) is retained.
     - To change to a different aspect ratio:
          Click to select the required aspect ratio.
     - To resize the overlay freely:
          a. Click **Free**.
          b. Click on the bounding frame. The mouse cursor will change to indicate the direction the overlay will be resized.
          c. Drag the mouse to resize the overlay. The overlay will be resized only in the direction of the cursor.
     - To rotate the overlay:
          a. Click outside the current overlay.
          b. Drag the mouse to draw a new overlay.
     - To replace the overlay:
          a. Click outside the current overlay.
          b. Drag the mouse to draw a new overlay.

2. Adjust the photo.

- To enlarge or reduce the photo:

  Use the + and - magnifier control buttons to adjust the photo size in stepped increments.

- To reposition the photo:

  Use the up, down, left and right control buttons to adjust the photo position in stepped increments.

- To rotate the photo:

  a. Use the counterclockwise circular arrow to rotate the photo to the left by 90°.

  b. Use the clockwise circular arrow to rotate the photo to the right by 90°.

- To flip the photo:

  a. Use the horizontal double-ended control button to flip the photo left to right.

  b. Use the vertical double-ended control button to flip the photo top to bottom.

- To reset the photo:

  Use the reset control button to cancel your changes and revert the photo to its previously saved version.

3. Save the photo:

Click **Save**.

The **Photos** tab is displayed with the saved photo.

When you save the photo, that part of the image highlighted in the cropping overlay is saved.

> **Note:** The saved photo replaces the original photo. The original photo cannot be restored.

Specifying the Primary photo

If you have several photos saved on the **Photos** tab, the first photo is used on that person's Identity page and is selected by default for the access badge. To use another photo instead, select the **Primary** checkbox of the photo you want.

Deleting a photo

To delete a photo from the **Photos** tab:

1. Click .

2. Click **Save**.

Creating Badges for Identities

Badges are identification cards that are used to verify a user's identity or association to an organization. Badges may also be used as access cards if they are printed directly on the person's RFID badge.

> **Note:** Before you can print a badge, you must connect a badge printer to the network and configure it. For instructions on how to configure your badge printer, refer to the printer's user guide.

To create a badge for a user:

1. Click ![icon] **Identities**.
2. From the Identities list, click on the name of the identity you want to edit.
3. Select the **Badge** tab.
4. From the **Badge Photo** drop down list, select a photo for this badge.

   Only the photos that have been previously uploaded or captured for this identity appear in this list.
5. From the **Badge Token** drop down list, select the token you want to associate with this badge.

   Only the tokens that have been previously defined for this user appear in this list.
6. From the **Badge Template** drop down list, select the badge template that you want to use for this badge.

   Only the badge templates that have been previously defined appear in this list.
7. Click ![checkmark] **Save**.
8. To print the badge, click **Create Badge**.

   The badge appears in a preview window.
9. Click **Print**.

> **Note:** When printing the badge, ensure that the Header and Footer settings are turned off or set to blank.

Searching for an Identity

Use **Identity Search** to find an identity.

1. Fill out the following fields:
   - **Last Name** field.
   - (Optional) **First Name** and/ or **Internal Number** fields.
   - (Optional) **Group** field.

   Blank entries will return all identities.

   > **Note:** *Identities using SALTO devices only.* First Name and Last Name are required. *Identities using HID Origo tokens only.* First Name, Last Name, and Email Address are required to enroll the identity in HID Origo. *Identities using DMP intrusion panels.* Identities are defined by their DMP user name, ID and DMP panel name.

2. Add other search criteria.
   a. **Search Field** drop down list.
   b. **Search Value** field.
   c. Click **Add Criteria** to add another search field and value.

   To clear all fields, click **Clear Search**.

   To remove a search row, click **Remove**.

3. To the right of the **Search** button, select either:
   - **And** to find all identities that fit all entered criteria.
   - **Or** to find identities that fit one or more of the entered criteria.
4. Click **Search**.

   The page displays your search results.

Editing an Identity

An identity must be edited when user information changes. For example if a user changes roles, their identity would need to reflect this. If the role is not updated, the user would not be able to access areas required for their new role.

To edit an existing identity:

1. Click ▦ **Identities**.
2. Search on the Identity Search screen, then click on the identity you want to edit.
3. Optional: Add notes about the identity and review previous notes, if any.
4. Navigate through the tabbed pages and make the required changes.
   - **Identity:** The identity details.

     The default Enrollment Operator role cannot edit this page. Contact your System Administrator for more details.
   - **Roles**: Assigns a role to this identity.
   - **Tokens** : Creates a token for the identity.
   - **Groups**: Assigns the identity to a group.
   - **Capture**: Takes a photo of the user.
   - **Photos**: Uploads an existing photo of the user.
   - **Badge**: Assigns a badge to the user.
   - **Timed Access**: Assigns timed access to the user.
   - **Access**: View the identity's access privileges including roles, access groups and doors.
   - **Transactions**: View transactional data associated with the identity.
   - **Audit**: View a log of all the changes that have been made to this identity.

     The default Enrollment Operator role does not have access to this tab. Contact your System Administrator for more details.

> **Note:** The labels of the built-in tabs, such as Identity and Tokens, may be renamed by your System Administrator. A custom form or User Defined Tabs with User Defined Fields may be added at the end of the list.

> **Note:** Remember to click ✔ to save the changes on each page.

Enrolling Identities and Issuing HID Origo Tokens

> **Note:** Before you begin, configure the Enroll Settings section in the HID Origo Management Portal.

To enroll an identity and issue an HID Origo token:

1. Select ▥ **Identities > Identities** and click **Search** to select an identity already created.
2. Click the **Tokens** tab and enter:

Token Type	HID Origo
Mobile ID Type	The mobile ID to be issued to the registered device.

3. Click ✅ **Enroll**. An invitation is sent to the email address of the identity.
4. Instruct the identity to follow the steps in the email, including clicking an app store link to install the HID Mobile Access app and then clicking the invitation code link to enroll.
5. After the identity accepts the invitation, the HID Origo token will be available in their mobile app.

Issuing a Token to an Enrolled Identity on a Registered Mobile Device

If you need to issue to an identity an additional credential with a different mobile ID, you can issue another token:

1. Click ➕ **Add Token** on the Tokens tab and enter:

Token Type	HID Origo
Mobile ID Type	The HID mobile card that is not already issued to the device.

2. Click ✅ **Issue Token**.
3. Select the mobile device in the Device Selector.
4. Click **Submit**. The token is displayed in the list of tokens in the ACM application. Another token is displayed in the HID Mobile Access app.

Registering a New Mobile Device for an Enrolled Identity

If an identity has swapped devices or if an invitation has expired, you can send another invitation:

1. Click ✅ **Send Invitation** on the Tokens tab.
2. Instruct the identity to follow the steps in the email, including clicking an app store link to install the HID Mobile Access app and then clicking the invitation code link to enroll.

Searching for HID Origo Tokens

To search for HID Origo tokens that were issued, or are being issued, to identities:

1. Select ▣ **Identities** > **Identities**.
2. Use **Identity Search** to find an identity.
   - In Search Field, select **HID Origo Token Status**.
   - In Search Value, select **Issued** or **Issuing**. To search for both statuses, leave blank.
3. Click **Search**.

Permissions and Rights

The following table describes the permissions and rights the default Enrollment Operator Role allows. All roles are made up of delegations. Each delegation is made up of rights.

Permissions	Rights
Add new identities. Cannot update fields after initial identity setup.	Identities My Account
	Identities Listing
	Identities Show
	Identities Advance Search
	Identities Date Search
	Identity Profiles Listing
	Identity Profiles Show List
	Identities New
	Identities Create
	Identities Edit
	Identity Profiles Populate Values
Force the identity to change the password at the next login to the ACM system.	Force Password Change
Add, modify, and update available roles	Identities Roles List
	Identities Roles Update

> **Note:** The Stop Dates on the Role page and Role Report are different due to the UTC (Coordinated Universal Time) time server difference. For example, `12/31/2037 23:59:59` is displayed in the former and `01/01/2038 23:59:59` is displayed in the latter. In ACM 6.18 and later releases, there is no stop date for the role that has Never Expire enabled.

Permissions	Rights
Add, modify, and update tokens	Tokens Listing
	Tokens Show
	Tokens New
	Tokens Create
	Tokens Edit
	Tokens Update
	Tokens Set Free Pass
	Identity Profiles Tokens Listing
Add and modify groups	Identities Groups List
	Identities Groups Update
View assigned access permissions	Identities Show Access
	Identity Profiles Show Access
Capture live photos and save	Identities Image Capture
	Identities Image Save
	Identities Code Image
	Identities Photo Capture
Add and upload photos	Identities Photo Edit
	Identities Photo Update
	Identities Photo Render
	Identities Upload Photo
View transactional data	Identities Transactions
Print and issue badges	Identities Badge Show
	Identities Badge Screen
	Identities Print Badge
	Identities Badge Render
	Identities Update Badge Preview
	Identities Update Badge

External Systems - Defining the Badge Camera for the System

Once all cameras or other imaging devices have been added as part of an external system, you can set which camera to use when creating badges for identities.

1. Select ![icon] > **My Account**.
2. Under the Profile tab, select a camera from the **Badge Camera** drop down list:
    - **Local Camera** — Any camera connected directly to your computer or built into your computer or monitor.
    - **IP-based camera** — Any IP-based camera previously connected to your network and added to your ACM system.
3. When you're finished, click ![checkmark] .

Next time you create a badge, the selected camera is used to take the identity photo.