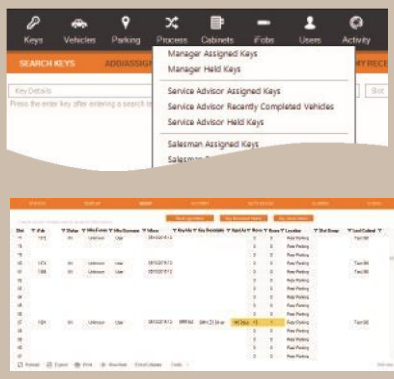
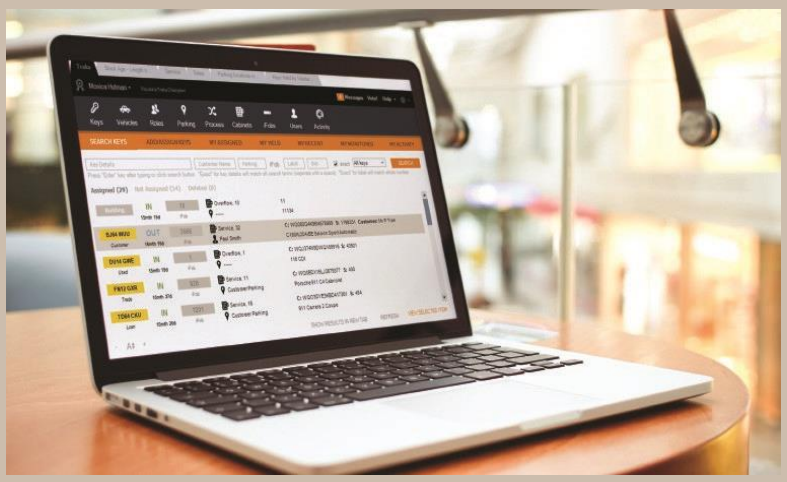
TRAKA AUTOMOTIVE
ADMINISTRATOR GUIDE

Assigning Non-vehicle key
Locking Row access Group
Key Curfews
Adding new user
How to Modify a User
User Enrolment Problems
Auto Extend Expiry Date if Inactive
Cabinet Inactivity

V1.4





HOW DOES TRAKA WORK

Vehicle keys are stored in the key cabinet and quickly searchable to find where the keys are, including the parking location of the vehicle or current process step.

Electronic tracking iFobs are used to allow the key cabinet to know where the keys are. As well as physically attaching the keys to the iFob there is a simple process to link the key within the software with key details picked up and synchronised with your DMS.

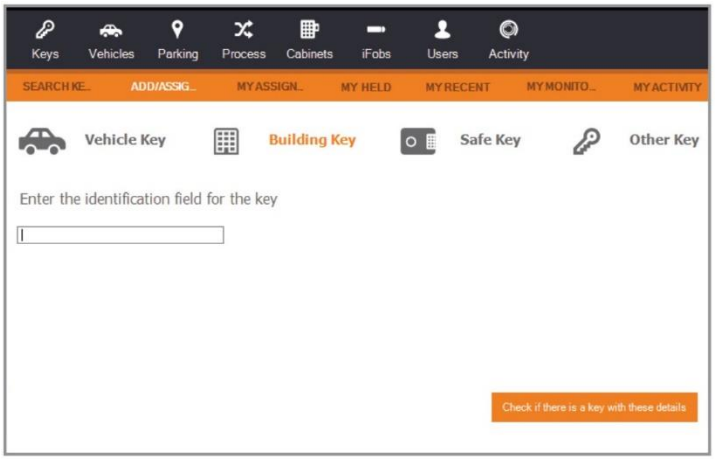
Users authenticate themselves via Fingerprint, PIN, access token or your existing swipe card system to gain access to the key cabinet.

All access and movements are recorded within extensive software providing audit trails of all transactions. When a key is removed, anyone else searching will see who is holding the key.

TRAKA AUTOMOTIVE: ASSIGNING A NON-VEHICLE KEY

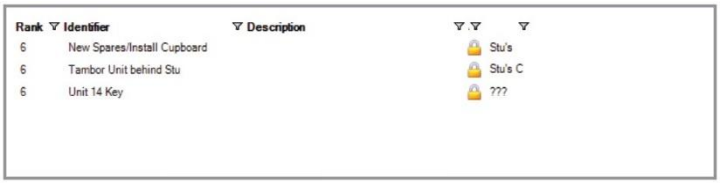
STEP 1

- To assign a key click on "Add/Assign a Key" then select the type e.g., Building, Safe or Other
- Type in a name for the key and click on "Check if there is a key with these details" button



STEP 2

- The software will search for any matches that are in the database (to avoid duplicate entries)
- Always click on the correct match if it is there to avoid any further re-typing and click "Select Highlighted Key"
- If the key is not in the list, click on "The key is not in the list" button

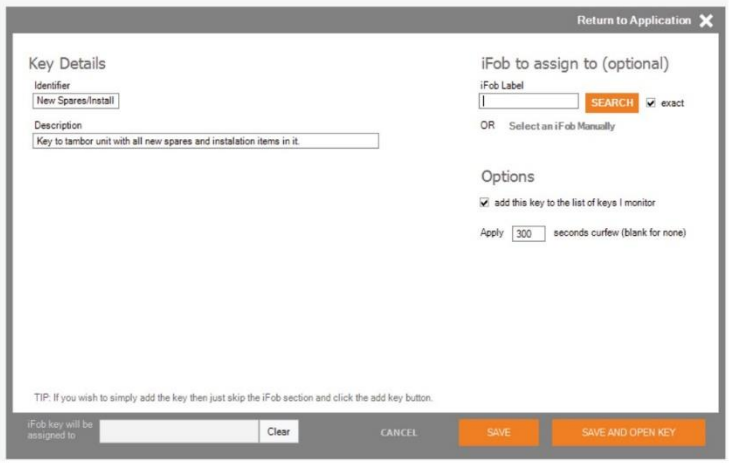


STEP 3

- Confirm, correct or populate the key details as required

STEP 4

- Type in the iFob label number (Tag number) that the keys will be attached to on the right-hand section of the screen then click the search button
- Once it has been found, click on the text of the iFob then click the "save" or "save and open key" button

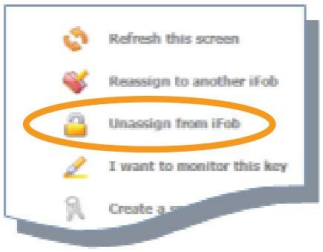


UNASSIGNING

When you have finished tracking a key you should unassign it from the iFob within the software:

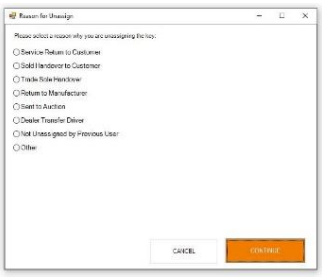
Search for the key

Once the details have been found, double click on the record and it will open up a new tab with the vehicle information, then click on "Un-assign from iFob"



REASON FOR UNASSIGNING

- If your dealership is using **Reason for Unassigning key**, once you clicked **Unassign** from iFob, you will be presented with a list of reasons
- Select a reason and then click **Continue**



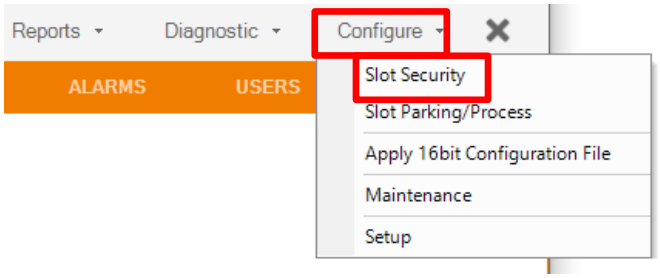
TRAKA AUTOMOTIVE: LOCKING ROW ACCESS GROUP

TRAKA LOCKING ROW

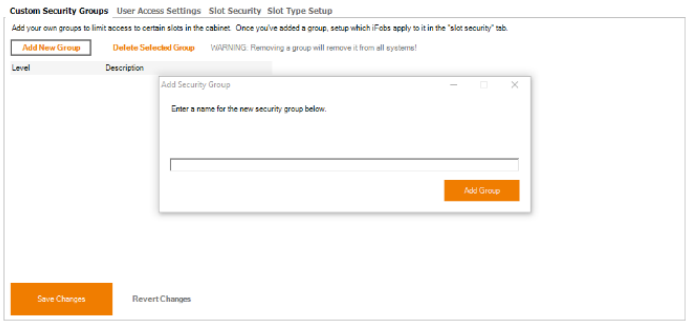
Traka key management systems can be configured to work with locking and non- locking rows. It is a common practice for many dealerships to have at least 1 locking row in each of the cabinets to store fuel cards or business keys.

CREATING ACCESS GROUP

- On the left-hand side of the main Traka screen, select the cabinet you wish to apply access group to.
- On the new screen, select "**Configur**e" in the top right corner followed by "**Slot Security"** from the drop-down menu.



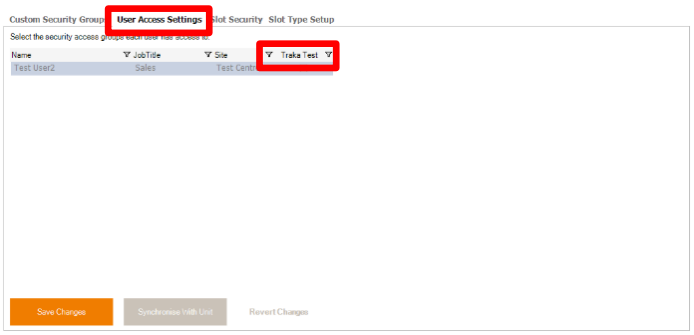
- Within the new window, select Custom Security Groups and "**Add New Group"**
- Add new group name on the pop-up screen and click **"Add Group"** Followed by **Save Changes**



Follow the same steps for all access groups that you wish to create.

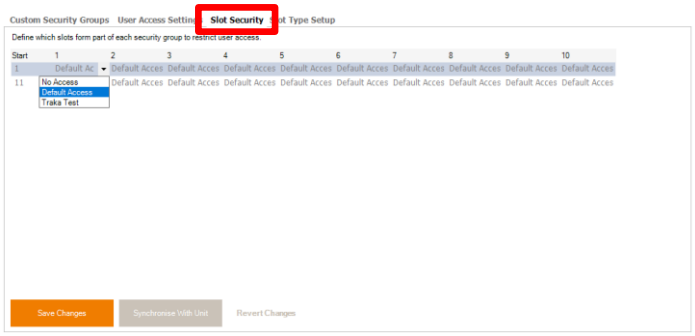
USER ACCESS SETTING

- Once above step has been complete, select **User Access Setting** on the top ribbon
- Within the new window, select all users you wish to grant access to.
- Click **Save Changes**



SLOT SECURITY

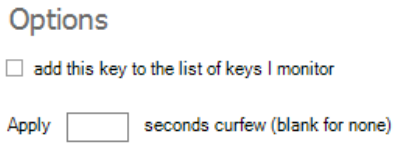
- To apply access group to locking row, select **Slot Security**
- Click on the drop-down arrow on all positions you wish to apply the access group to.
- Once complete, click **Save Changes**



TRAKA AUTOMOTIVE: SETTING KEY CURFEWS

SETTING A CURFEW DURING KEY ASSIGNMENT

In the final step of assigning a key, there is an "Options" area where you can enter a maximum time period that the key should be out of the key cabinet. This can be set both to vehicle and non-vehicle keys. Simply apply the curfew time in "Options" section. Please note the curfew is set in seconds.



SEARCH RESULT CURFEW VISIBILITY

Within the search results the "OUT" status will be red if the duration that the key has been out, is past the curfew duration that has been entered.

VIEWING CURFEW HISTORY FOR A KEY

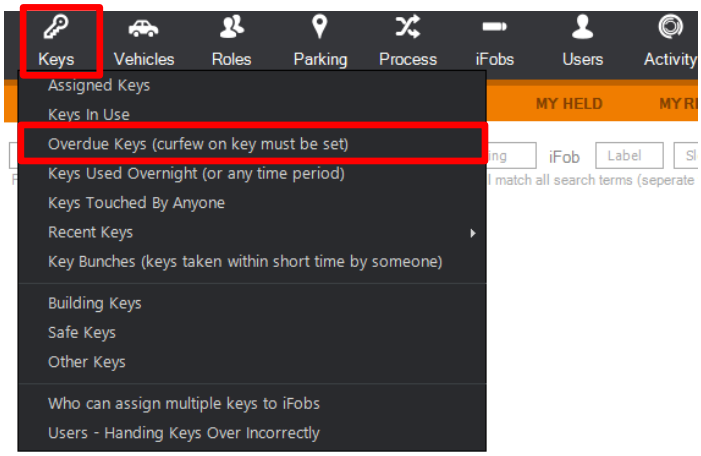
When viewing a key you can click on the "curfew" tab and show the history of the durations the key was out. You can also edit the curfew duration if you wish to.

REPORTING OVERDUE & SOON TO EXPIRE KEY

Within the "Keys" menu there is a "Overdue Keys" report that lists the keys that have a curfew set and how much time is remaining, or the key is overdue by.

- Click on **Keys** on the black ribbon
- Followed by Overdue Keys

You will now be presented with a list of keys which have a curfew applied to and are either overdue or how much time is remaining.



USER GROUPS

Traka advises to group users into 3 levels.

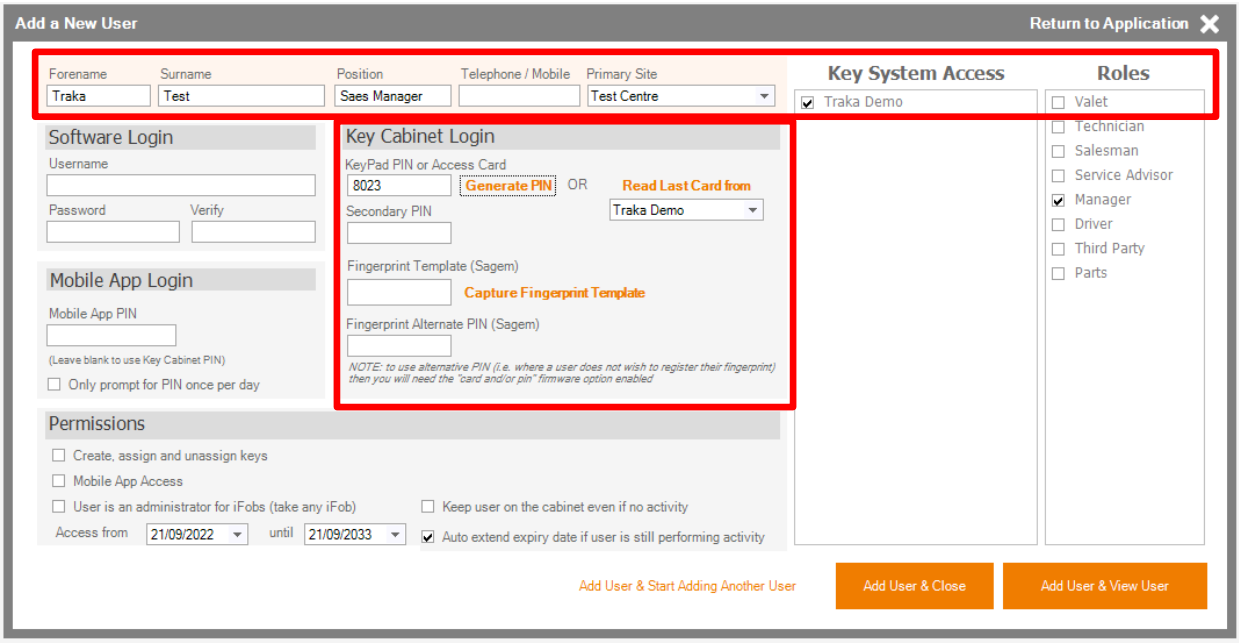
Level 1 – typically are back of house staff who do not have customer interaction i.e technicians or valeters. They require cabinet access but not necessary software access.

Level 2 – front of house staff who are required to add, assign keys and perform basic searches on the software i.e. Service Advisor or Sales Executive.

Level 3- system administrator who is able to add/modify users, add new iFobs and most importantly go through system reports. Level 3 access is normally given to the management team.

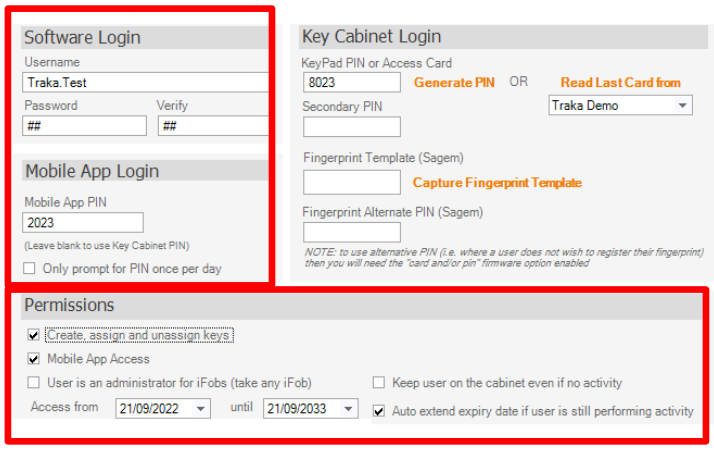
ADDING NEW USER

- To add a new user click on the **User** icon and Select "**Add New User"**
- For all users, please complete the following section: **Forename, Surname, Position, Primary Site** (drop down option), **Roles** located at the top part of the Add a New User screen.
- If sites are configured, then selecting the "Primary Site" will assign the user to that site and automatically select access to the cabinets for that site. Selecting primary site will also make reporting easier in the future. Alternatively, manually click on the tick boxes to give the user access to the specific cabinets they require
- All users should have their own Key cabinet access, Enrol user to the cabinet by following one of the enrolment procedures in **Key Cabinet Login** Section. For different authentication options, please see page 7.
- If adding Level 1 user, Click **Add User & Close.**



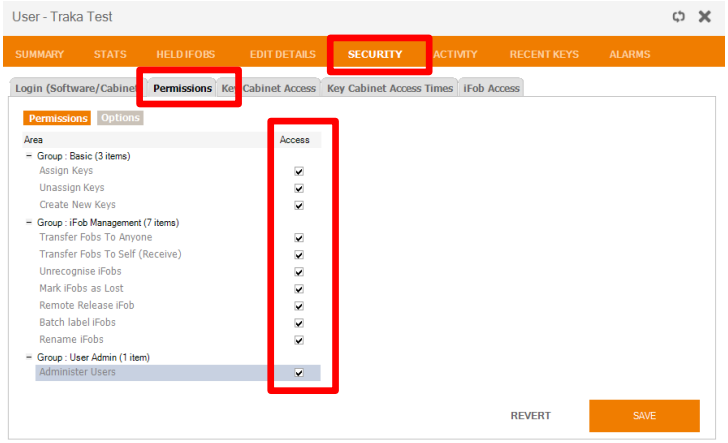
ADDING LEVEL 2 USER

- In addition to the above steps, for Level 2 users, please complete **Software Login** section by giving a user a software username and password.
- Your IT team will be responsible for installing Traka Client Software on all users' PCs.
- For mobile app access please ask the user to create their own 4-digit pin, the username remains the same as for Software Login
- To complete Level 2 user, under **Permissions** section, please tick the option **Create, Assign and Unassign Keys** for all users who will be performing those functions
- If you have many users to add, you can click "Add User & Start Adding Another User". This allows you to quickly add users and then use the separate batch user editing features to batch enrol fingerprints/swipe cards, set permissions, etc.



ADDING ADMIN USER LEVEL-3

- To add System administrator, Level 3, please complete the previous steps, however, when completed, please click **Add User & View User**
- Within the new window, please click **Security** on the orange ribbon, followed **Permissions** on the grey ribbon
- Ensure that all options under 3 groups Basic iFob Management and User admin are ticked
- Click **Save** in the bottom right corner



TRAKA AUTOMOTIVE: CABINET ENROLMENT

PIN ONLY

- Enter a unique 4-digit PIN number for the user to use in the Primary PIN box
- Alternatively click the "Generate" button to have a unique PIN automatically generated

FINGER IDENTIFICATION - SAGEM

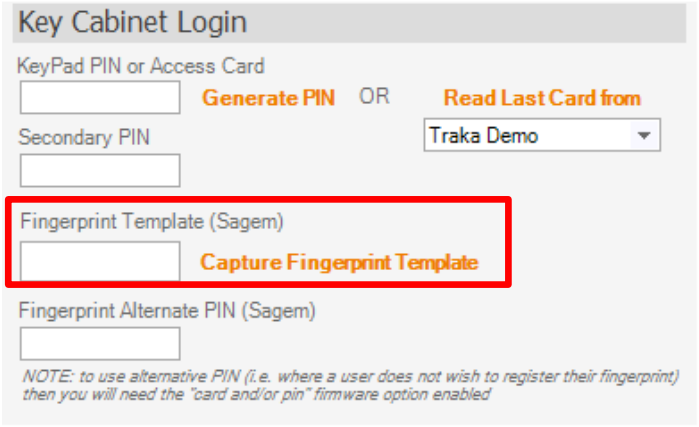
- You do not need to enter any PIN as the Sagem reader will automatically identify the user from the fingerprint
- Ensure that you have the Sagem desktop enrolment module installed on your PC and then click the "Capture Sagem Fingerprint Template". You will need to present the same finger three times - you can optionally enrol an optional second finger. You must make sure the orientation is the same i.e. white space to the left with finger pointing upwards
- Save the user and the fingerprint template will be automatically synchronised across all key cabinets the user has been given access to. You can now go to the key cabinet and press the "#" key then place your finger on the reader to gain access

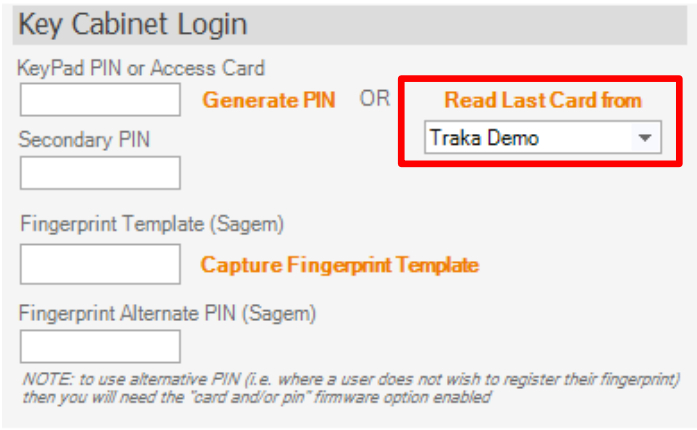
TOKEN/CARD

- Swipe Users' Access Card or Proximity Token against the reader at the cabinet. You will hear a "Beep" after which, the LCD will say "ID not recognised"
- Using the software, select the key cabinet used in step 1 from the dropdown menu and click "Read Last Card from". The card ID number should appear in the KeyPad Pin or Access Card box.

FINGERPRINT ALTERNATIVE

- In the event where cabinets are using Sagem access control and a user has very bad fingerprints, it is possible to offer PIN access too.
- Under Key Cabinet Login section, Enter a unique 4-digit PIN number in Fingerprint Alternative PIN (Sagem) box
- To access the cabinet, press and hold the **#** on the keypad until prompted to enter the PIN.
- Enter the pin and press the **#** key again





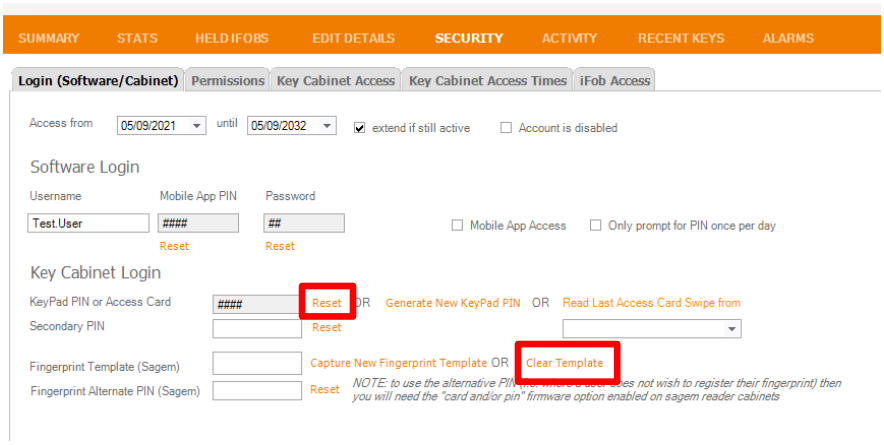
TRAKA AUTOMOTIVE: HOW TO MODIFY A USER

HOW TO MODIFY A USER

- To modify a user click on User icon followed by Search Name/Pin
- Type in User's name in the search box and click **Find.** Once the user has been found, double click on their name
- Within the new window, click **Security** on the orange ribbon
- To change mobile app pin or software password, click reset under the window and generate new pin/password.

ACCESS CARD RESET

- For Card access changes, click **Rese**t next to KeyPad PIN or Access card.
- Swipe Users' access card or Proximity Token against the reader at the cabinet. You will hear a "Beep" after which, the LCD will say "ID not recognised"
- Using the software, select the key cabinet used in step 2 from the dropdown menu and click "Read Last Access Card Swipe from". The card ID number should appear in the KeyPad Pin or Access Card box.

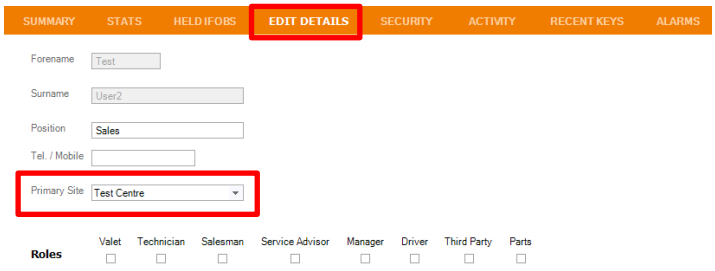


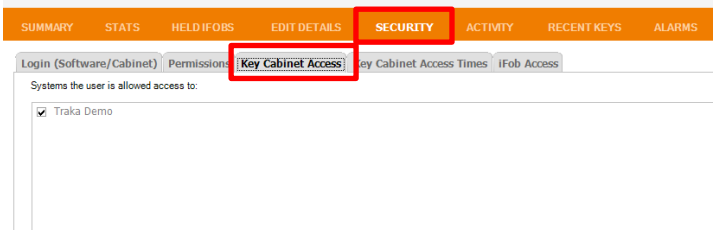
RE_ENROLL FINGER - SAGEM

- Ensure that you have the Sagem Desktop Enrolment Module installed on your PC.
- Click **Clear Template** next to Fingerprint Template (Sagem)
- Next click "Capture Sagem Fingerprint Template". You will need to present the same finger three times - you can optionally enrol an optional second finger. You must make sure the orientation is the same i.e., white space to the left with finger pointing upwards
- Save the user and the fingerprint template will be automatically synchronised across all key cabinets the user has been given access to. You can now go to the key cabinet and press the "#" key then place your finger on the reader to gain access.

USER MOVING SITES

- If any of your new starters have moved sites within the group, the chances are they might already have a Traka Account and there is no need to create another one for them. This is only possible if all sites are linked together.
- First find the user using the user search or user lists e.g., clicking the Users icon then selecting the "Search User" or "List users" reports etc.
- You should double-click the user's entry to open up the users details which will take you to their summary page
- Click on **Edit Details** to change User's Primary site to current location and click **Save**.
- Click on Security followed by **Key Cabinet Access**
- Select which cabinets the user should have access to and click **Save.**





TRAKA AUTOMOTIVE: USER ENROLMENT PROBLEMS

CHECKS

View the user and check the Security tab:

- Check the "Key Cabinet Access" to ensure they have been given permission to access the cabinet
- Check the "Key Cabinet Access Times" to ensure they have not been given incorrect access times
- Check the "Login"
- Check their active start and end date
- Check the account is not set to disabled
- Check there is a PIN or fingerprint template captured
- View the user and then select "Synchronise this User" to re-attempt downloading the user permissions to the cabinet

View the cabinet and check the Users tab:

- Ensure the user is present in the list – if they are not then they have not been given permission to access the cabinet. You can edit this in their user record
- Confirm the "Is On" column for the user has a tick and the "Put On" date time is valid
- Scroll across to the "Checked Code" column – if there is a code here then there was a problem downloading the user permissions to the cabinet

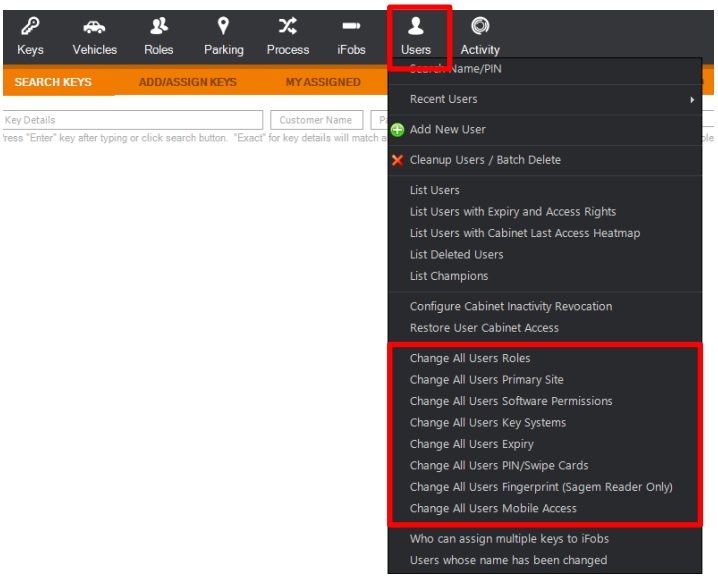
REQUIREMENTS

- If you use a PIN code, then each user must have their own unique code
- If you capture a fingerprint template, then this needs to be unique across users – if you have added the user twice by mistake then you must delete the other records and then resync the one remaining user
- If you capture an optional second fingerprint template this must be from a different finger

BATCH USER CHANGES

There are number of batch user changes that an administrator can perform across multiple users without the need to individual search for them. The functionality is especially useful when trying to review all user roles or adding them to new key system should one be installed.

To access, batch user changes, click on **Users** on the black ribbon and select the task you wish to perform.



TRAKA AUTOMOTIVE: AUTO EXTEND EXPIRY DATE IF INACTIVE

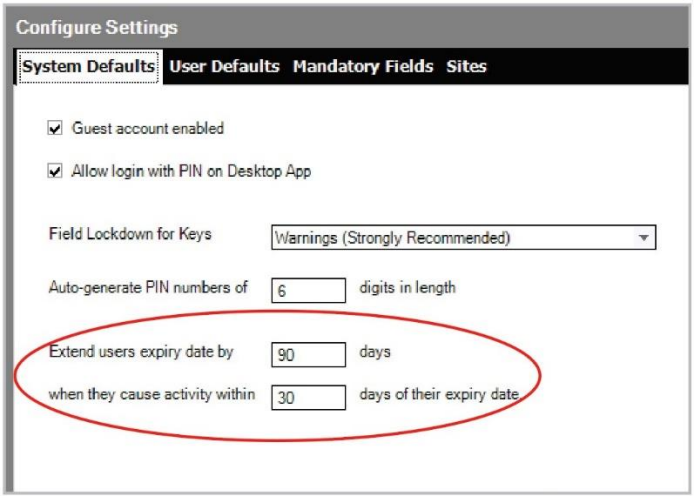
PURPOSE

Users are given an expiry date when they are first added onto the system. By default, this is ten years from the date the user is added.

An expiry date can also be set that is different to the default, for example three months.

As users approach the date of their expiry, you may wish to allow their expiry date to be extended if they are still causing activity on the system within a specific time window.

The user's expiry date will continue to be extended indefinitely if they continue to cause activity.



CONFIGURING EXTENSION PERIOD

Go to the configure menu (cog) and select Configure Global Settings.

From there you can set the amount to extend a user's expiration date by if the user causes activity within the system in a time window of their expiration date.

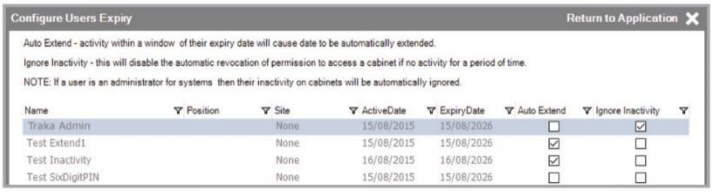
The default is to extend the expiry date of a user by 90 days if they cause activity within 30 days of their expiration date.

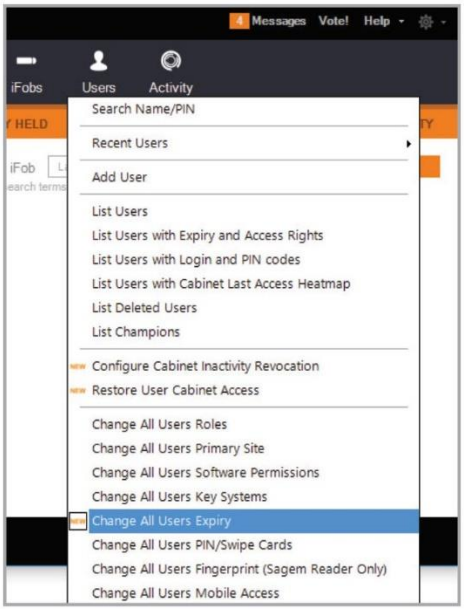
ENABLING AUTO EXTENSION FOR USERS

When adding new users, the default is to automatically extend if there is activity—you can untick the box if you want to exclude the user from this.

By default, existing users will not have their expiry date extended. You can either edit individual users or use the batch edit function.

Go to the user's menu and select Change All Users Expiry. You can then change user's expiry date or enable/disable users from auto-extending their expiry date if they cause inactivity.





TRAKA AUTOMOTIVE: CABINET INACTIVITY

PURPOSE

Users may be given access permission to one or more cabinets to remove and return keys. Sometimes a user may be given permission to access cabinets they no longer have a need to access or given access to a cabinet inadvertently.

By setting up cabinet inactivity duration, you can enable users to have their permission to access specific cabinets revoked if they do not use that cabinet for a period of time.

Not all users will have their permission revoked due to inactivity. If the user has the "administer systems" permission, then they will not have their inactivity monitored. You can also exclude specific users.

SETTING UP CABINET INACTIVITY DURATION

Go to the user's menu and select **Configure Cabinet Inactivity Revocation.**

Within the **Cabinet Setup** tab, enter the duration of inactivity. You can click the "Set to 30 days" button to quickly set the inactivity duration to 30 days.

Leave this at 0 (or click the reset button) if you want to disable the inactivity revocation.

The **Unaffected Users** tab will show you wish users are not affected by inactivity on that cabinet, either as a result of the user being an administrator or the user being specifically excluded.

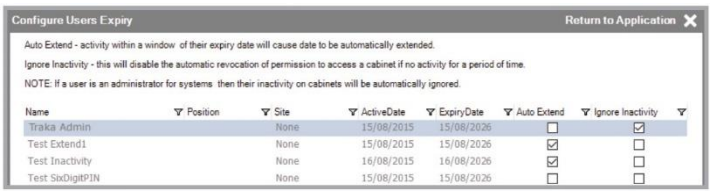
RESTORING CABINET ACCESS TO A USER

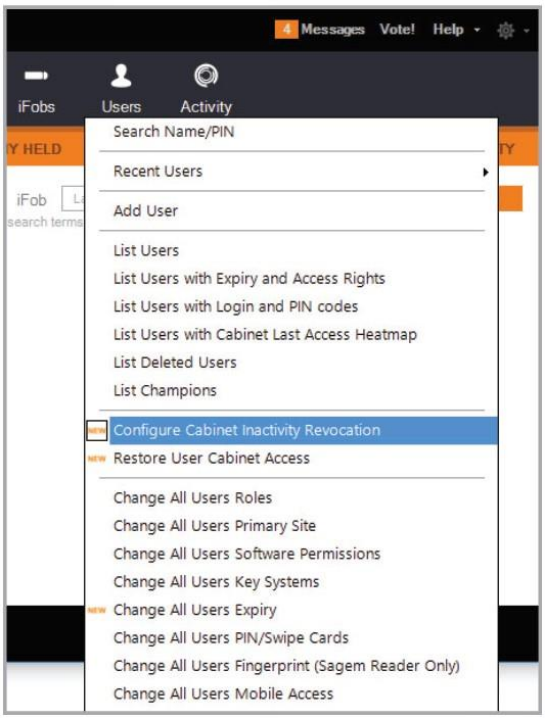
Go to the user's menu and select **Restore User Cabinet Access**. You can see which users have recently had their access to a cabinet revoked either due to inactivity or due to an administrator removing their permission.

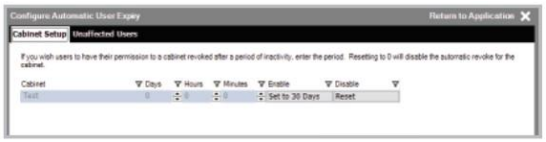
To restore access, tick the restore box for the user(s) and cabinet(s) and click save.

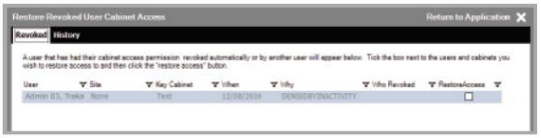
EXCLUDING USERS

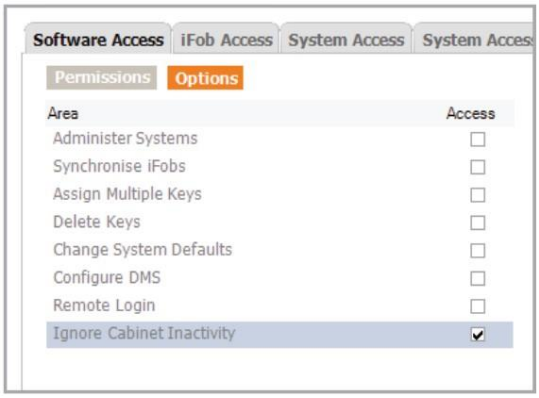
Go to the user's menu and select **Change All Users Expiry**. You can then tick the "Ignore Inactivity" option for the user(s) you wish to exclude and then click save.











You can also exclude a user by editing them and choosing the **Ignore Cabinet Activity** option.